



# Restaurant Manager Ver 17 OO Installation and User Guide

Version 2.0

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# INTRODUCTION

Restaurant Manager offers an integrated approach to On Line Ordering. Using RM Online Ordering you can add menu items using your RM BackOffice Module and easily upload them to your web menu. This approach eliminates the need of having to learn new software and removes the necessity of double menu entry processes experienced with third party software. This, in turn, saves time and places more control in your hands.

ASI is committed to the success of your On Line Ordering system. ASI and your dealer will help guide you through the startup process. ASI will help with the initial configuration of your On Line Ordering. In addition, ASI makes marketing tools available to help with the success of On Line Ordering system depending on the level of service you have purchased. Regardless of your purchased level of service, you will want to read the section on [Marketing Tips](#) to pick up some helpful pointers to insure the success of On Line Ordering.

Before proceeding with the setup, it is highly recommended you read the section on [Requirements](#). This section outlines both the hardware and software needed to keep the data on your computer network safe and to insure proper operation of your On Line Ordering system. The requirements are few but are considered important.

Restaurant Manager v.17 and RM's On Line Ordering Service allows you to sell the restaurant's products online. It can be implemented in two ways:

1. **An Integrated system (preferred)**- this system seamlessly interfaces to the Restaurant Manager point of sale system running at the restaurant.
2. **A Stand-Alone system**- channeling customer's orders to a fax machine or dedicated computer terminal connected to the internet. ([Covered at END of this document](#))

In the former case, orders placed on-line by customers are processed for payment and then routed directly to the preparation area printers, eliminating the need to enter the order manually into the POS system. Also, if integrated to Restaurant Manager, changes made to the menu are uploaded to the online ordering web pages, eliminating the need to maintain two separate menu databases.

Before proceeding lets outline the setup process that lies ahead. The setup process is relatively easy.

- [Verify System Requirements](#)
- [Send ASI Setup Information](#)
- [Receive OO Information from ASI](#)
- [A Mercury or YesPay account for CC processing](#)
- [Setup Chain Information](#)



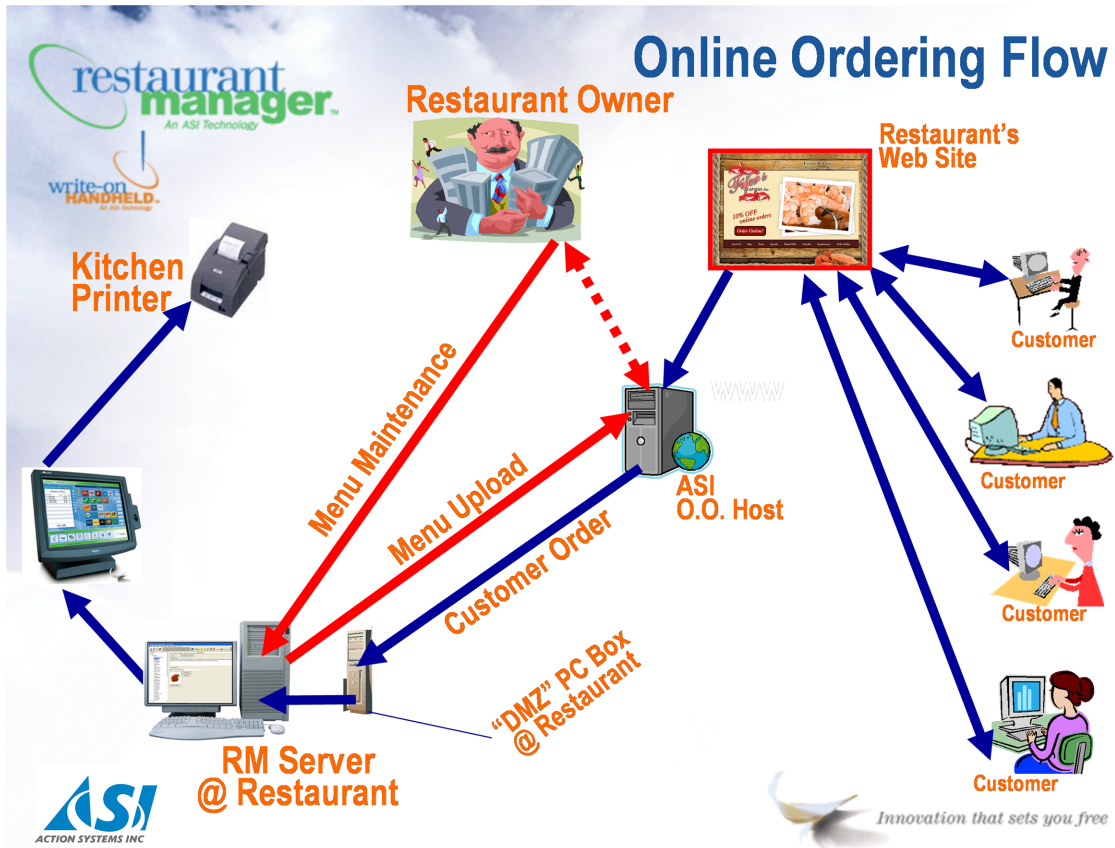
- [Setup Store Information](#)
- [Setup Menu and Station Configurations in store on site RM Program](#)
- [Upload information to ASI Host OO Site](#)
- [Connect the restaurant's web site to the online ordering portal](#)
- [Test Orders](#)
- Go Live

***This document focuses on the INTEGRATED On Line Ordering. For information on Stand-Alone On Line Ordering (without RM POS at the restaurant) see the Section on [Stand-Alone Web Ordering Option](#).***

Before we get started on the Administration and Setup information, let's get familiar on how On Line Ordering data is processed. After your On Line Ordering system is in place the following are the basic steps on the ordering process:

- Customers accesses your web site and places order
- Order is routed through the ASI OO Host Server
- From the ASI Host server the order is sent to the Restaurant and processed through a DMZ server
- The order is sent to the Restaurants Server Computer it is and is a split second is sent to both a local POS terminal and the prep printer (i.e. kitchen)
- Customer receives a confirmation notice via email that order has been accepted.

It is that easy. Menu maintenance takes even less steps to process! Below is a chart to illustrate the process.



(continued from Payments)

# MARKETING TIPS

## Marketing Tips for the Restaurant Owner / Manager

The marketing of your On Line Ordering program is critical. Marketing is the linchpin to its success. Proper marketing will drive customers to your web site. The suggestions below will not only get customers to your web site but give them the incentive to order.

You can start to consider different marketing concepts by reviewing the [Online Ordering Best Practices](#). This document offers more details in marketing your On Line program including advertising and marketing collaterals. From this document you will want to:

Start your marketing program before starting On Line Ordering by:

- Start in advance to announce that “On Line Ordering Is Coming” You may want to offer incentives like “Save X% for ordering online”. Marketing in advance will get customers excited about the new program.
- Contact ASI at 800-356-6037 for information on Optional monthly email, direct mail, and other marketing activities that can help drive your online sales.
- Have professional photos taken of your main items, so they can be posted on line. (see specs later in this document)

Once installed you will want to do “Whatever It Takes” do drive traffic to your web site, and then to order on line by:

- Offering an incentive to order on line. Consider offering [percent discount](#), a free drink, cookie, or brownie. You may also want to consider the option to free [delivery](#) for online customers.
- Write up “delicious” [descriptions](#) of your menu items offered for sale on line. A restaurant menu is more than a list of food and prices. Rather, it should be considered a reflection of your restaurants style and concept. Find and use resources if you have troubles with descriptions. Go on-line to sites like [Restaurants.about.com](#) or go to other restaurant’s web sites to see what they are doing.
- The single most important thing you can do to increase on line sales is install a “telephone auto-attendant” in your restaurant. Implementing this procedure is a sure fire method to drive customers to your web site.

(continued from Appendix: Additional Sources)

# REQUIREMENTS

Restaurant Manager's On Line Ordering has very few requirements needed to operate. The requirements that are needed will help keep the security of computer system safe, aid in the transfers of data between your Restaurant Manager program and the web ordering site, expedite the setup process. Please read the sections on System Requirements and Configuration Requirements carefully.

## SYSTEM REQUIREMENTS

***Before proceeding, you should download the latest version of RM v. 17 and Write On v.17.***

The following lists the hardware and software requirements:

### HARDWARE REQUIREMENTS

The following require a minimal investment in hardware but are necessary to keep data on your local network secure.

**Dedicated Back-End Fileserver-** The fileserver must have a fixed IP address. This computer must not operate as a POS terminal. The fileserver will run the Restaurant Manager RMServices.exe used for Online Ordering connectivity

### RESTAURANT MANAGER SOFTWARE REQUIREMENTS

Most of the RM software are included at no extra cost but must be enabled and will be run from the local site:

- **Restaurant Manager Version 17-** The version should be the most current.
- **Write-On Handheld Version 17-** The WO software aids in the processing of on line data. The WO program should have at least one station enabled. You do *not* need to order Write-On software separately; it is included when you order OO. Make sure you are using WOPKG17.0.2011.07250 or later.
- **Advance Ordering Module-** This module is used to process and convert On Line Orders at the local site. The Advanced Ordering Module software come included with On Line ordering but must be enabled in both the system and in the station configurations.
- **TABS, and/or DELIVERY Module-** On Line Orders can be configured to be sent to one of the two modules. One of the two modules needs to be ordered if the site doesn't is not currently being used. IMPORTANT: These modules must be enabled in the system and in station configurations.

### OTHER SOFTWARE REQUIREMENTS

It is important to verify that these requirements are met.

- **Windows XP Professional** (minimum)
- **Bitwise Tunnelier**- the Bitwise Tunnelier program provides safe data passage between ASI hosted servers and the restaurant computers. The Bitwise Tunnelier program replaces the need for a "DMZ" computer. Please refer to the [Bitwise Installation Guide](#) for specific install instructions.
- **Third Party Remote Access Software**- this will provide the ability for support to remotely access your local computer. This can take many forms including Logmein Central (preferred) or PC Anywhere over a secure network (i.e. VPN). You must consider PCI Guidelines when using a third party remote access software.

Online Ordering Setup requires you to make changes/additions to the RM Back Office software in the restaurant. In addition, you must also log onto the [ADMIN](#) pages on the web, and "link" the Online Ordering "portal" to the restaurant's RM Back Office PC/Server

## DATA REQUIREMENTS

The data requirements listed in the next two sections are needed to setup and establish connections to the On Line Ordering host site, the store site, and to set online ordering parameters. You will need the information listed below to fully configure Online Ordering.

### DATA NEEDED FROM RESTAURANT

The sooner this information is received by ASI, the smoother the startup process. Please contact ASI or your dealer if you are unsure of any of the requirements.

- Restaurant Web ID for each restaurant. (if more than one) If only one, use name of rest.
- Type of ordering methods allowed: DINE-IN, TAKE-OUT, DELIVERY
- Business name and logo, if available (preferred size is 775x125 pixels at 72dpi)
- Fixed IP address of the RM PC/Server at the restaurant
- For Chain Setup: Call Center operators' username & passwords (if applicable)
- Credit card information from [Mercury Payments](#) for the e-commerce account. (Merchant ID, and Password)
- Allowed Payment Methods for On Line Orders.
  - [PayPal](#) or Credit Cards thru [Mercury Payments](#) or ([YESPAY](#) – UK Only)
  - Even if the restaurant has a [Mercury](#) account at the restaurant, a second e-commerce account from Mercury is required.

Note: A restaurant may take credit cards online, without a Mercury or YesPay, but this can only be done thru PayPal. It is easier and faster for the end-user to simply select "pay with credit card", than it is to "pay with credit card thru PayPal, and then be re-directed to the PayPal site.

Note: All pay types used On Line need a corresponding Method of Payment in RMWIN Back Office. You can have them all go to one payment method, but it is advised to give each on-line payment method its own corresponding RMWIN payment method. (RMREFNO)

(continued from Placing an Order via the Internet)

## ASI'S OO HOST SETUP

This section describes the procedures and data fields on the OO administration page used to define many of the parameters needed to process on line orders. The data you provide ASI will be used in data fields. Most of the fields will be setup by ASI or your RM reseller (dealer). However, you should possess some basic knowledge of the information provided in this section so you can make changes when business requirements demand it. Example: you decide to expand your delivery range and need to change the zip code range. In this case you can login into your unique OO Admin page and adjust the [zip code range](#). Perhaps you are expanding your hours of operation and need to change the information of your OO web menu page. You can make this change yourself by going into [the Operating Hours Entry field](#) .

The information needed to access your OO Administration page will be provided by ASI after your dealer submits your OO purchase to ASI. Please retain this information for your records. The information provided will be used to connect to the Admin page, passwords to limit access, and links to be placed on your website to access the OO portal. The information you will be sent is as follows:

- URL for On Line Ordering [Admin pages](#). – The URL is the web link used to access the Admin page where web site parameters are defined.
- URL for On Line Ordering Portal. This URL is the web link used to access your On Line ordering page. This is the site your customers will use to place orders. This is also the link that must be embedded in the restaurant's web site by whoever manages their web site.
- User name and Password for administrator to login into [Admin pages](#).-This information is used to access the Admin page.
- Web ID (For identification purposes only) - The web ID is unique to your establishment.
- Link to Install User Setup Guide and Checklist- the Guide and Checklist are reference materials

## OO ADMIN PAGE AND FORMS

The Admin page contains the data fields used to define the behavior and information displayed on the OO Portal. To make changes to the OO Portal you must access the Admin page using the link sent to you by ASI. You must use the user name and password provided by ASI to enter the site to access the Admin page.

### LOGGING ON

Use the following steps to logon to the Online Ordering Administration Server v.17:

1. Copy and paste the following into your web browser address bar: <http://webordering.rmwservices.com/v17.0.AdminUI/Login.aspx>

restaurant  
manager™  
An ASI Technology

Online Ordering Service

Administrator Log In

Username

Password

Login

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2. Enter the assigned username and password. (These will have been emailed to you, from ASI)

## OO ADMIN DEFAULT PAGE

Once on the Admin Page you can proceed to one of the setup forms listed below:

- [Chain Setup](#)- contains the entry fields for site address, phone numbers, email address, policy statements.
- [Restaurants](#)- This form contains the data fields for store specific data for information relating to addresses, stores name and telephone numbers. In addition, this form contains fields relating to discounts, delivery minimums, and various information sections displayed on the OO Portal.
- [Accounts](#)- In this area, you may set up several different administrators who can make changes to the Online Ordering account, thru the ADMIN pages.
- [Menu](#)- This form allows you to change the order of how menu groups and items are displayed on the OO Portal independent from the RM BackOffice option.
- [Pizza Setup](#)- Pizza information is uploaded from the RM BackOffice. This form allows you to view how the Pizza menu is displayed On Line.
- [Customers](#)- This form contains customer information for all restaurants in a chain are kept in the same database when using Call Center mode
- [Coupons](#)- -This form is used to add additional restrictions to coupons
- [Error Log](#)- The primary use of the error log is to assist ASI developers and tech support personnel in determining the reason an error occurred.
- [Reports](#)- This page contains various online reports where you can view information on customers who have been online and made a purchase and those who have registered but did not make a purchase.





## CHAIN SETUP FORM

The Chain Setup Form contains the entry fields for site address, phone numbers; email address, policy statements etc. Click on the Chain Setup option on the default Admin page to access the form. The Chain setup form is divided into four sections:

1. [Edit Chain Info](#)- This section is where you record basic information for policy statements, various contact information, etc.
2. [Order Type Names](#)- used to name the method of product deliverance (i.e. pick up vs. carry-out)
3. [Statues](#)- To be implemented.
4. [Call Center Operators](#)- Add and/or edit the call center operators when using the Call Center Mode

## Edit Chain Info

Chain ID **170**

Chain Name  Single Menu

Web Id

Country

State

City  Address 1

Phone Number  Address 2

E-Mail  Zip Code

Allow Phone Login  Order Time Inc

Main Color  Login Timeout

Home Page Url  PH. Format

Reseller EMail

Privacy Policy

Return Policy

Terms & Conditions

## Order Type names

Delivery  Carry Out  Dine In

Picture

Only GIF images allowed

## Statuses

	ID	Name
Select	299	Accepted
Select	300	Closed

< >

## Call Center Operators

ID	Login Name
----	------------

< >

## **Edit Chain Info:**

The following lists and defines the purpose of each field in the Edit Chain Info section of the Chain Setup Form. When you are finished with your changes it is important you save your changes by:

1. Press the "SAVE" button on the bottom page
2. Click OK when prompted



### **Edit Chain Info Fields**

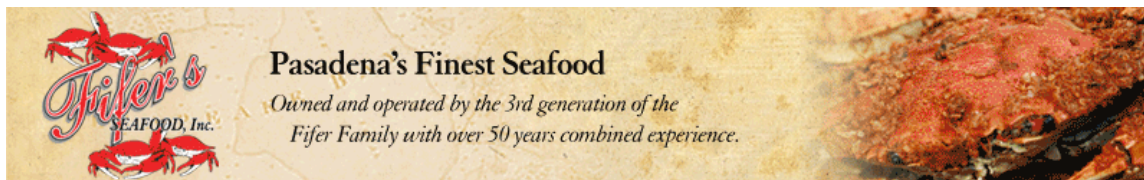
**Chain ID** – Initially setup by ASI. This will be numeric value and cannot be changed by user. You will not use.

**Chain Name** – Initially setup by ASI and cannot be changed by user.

**Single Menu** – This should be enabled by ASI if the chain uses same menu for all locations. This information cannot be changed by user.

**Web ID** – Web identifier for the chain. Initially setup by ASI and cannot be changed by user. **Used later in [Web Upload Set-Up](#), in the field called "[Chain Connection ID](#)".**

**Picture** – Use this to upload the logo/banner for your chain, and if you choose [Mercury](#) or [YesPay](#), an image for each credit card logo, (displayed on the start page of the OO Portal) The banner picture is displayed across the top of each page. Recommended dimensions are 800 by 125 pixels or smaller, 72 dpi. There is a maximum file size limit of 500KB. The images are limited to GIF files, but can contain animation. If you have any questions, please contact [design@actionssystem.com](mailto:design@actionssystem.com)



**Chain address/contact information** – Information as you want it to appear on the online ordering page.

**Phone Number** – Enter the number you wish customers to call if they have questions (HQ number is this is a chain or multi-unit account. (You can enter phone numbers for individual stores/restaurants in a different screen)

**ZIP Code-** Enter the restaurant zip code in this field.

**Order Time Inc-** The number in this field allows the customer to choose the ready time (on the OO customer portal information field). The increments available are: fifteen minute, on the half hour, or on the hour.

**LogIn TimeOut-** Enter the time you will allow the customer to stay logged into to the OO customer portal before logging out.

**E-Mail –** Enter the email address for the restaurant.

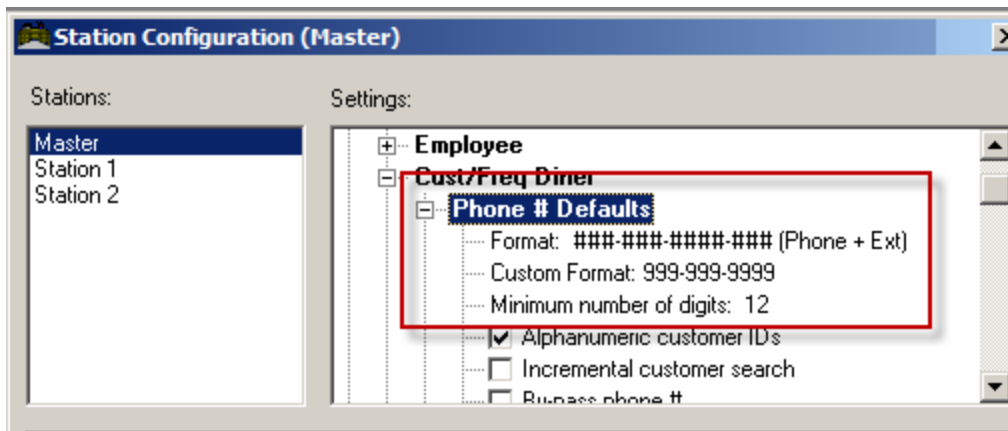
**Allow Phone Login –** Select this box if you want the customers to register with their phone number, as opposed to their e-mail address. Leave unchecked if you want the customers to register with their email address.

**Main Color –** Set by ASI. *Do not modify.*

**Log In Timeout-** Enter the number of minutes you want the browser to timeout after no activity.

**Home Page URL –** Enter the address of the restaurant’s web site.

**PH Format –** Uploaded from RM BackOffice System Configuration. To change the format- go to RM Back Office > Setup > Station Configuration > Cust/ Freq Diner > Phone # Defaults. You will have to change both the Format, Custom Format, and Minimum Number of Digits field settings if implementing a custom format. This change will only have to be done on the Master Station unless the system is using another station to process online orders.



**Reseller E-Mail –** Entered by ASI at Set-Up

**Privacy Policy –** Make any changes to the standard or “boilerplate” that is included.

**Return Policy –** Make any changes to the standard or “boilerplate” that is included.

There are places for the restaurant’s NAME, E-Mail Address, & Phone Number in this section.

**Terms & Conditions –** Make any changes to the standard or “boilerplate” that is included.

There are places for the restaurant’s NAME, E-Mail Address, & Phone Number in this section.

For a SAMPLE copy of Privacy Policy, Return Policy, and Terms & Conditions, go to: [http://www.actionsystems.com/downloads/jerry/privacy policy.doc](http://www.actionsystems.com/downloads/jerry/privacy%20policy.doc)

## **Order Type Names**

The Order Type is typically defined as the method of product deliverance. By default, Restaurant Manager has three order types: Delivery, Carry Out, and Dine In. However, Restaurant Manager understands your establishment may use different terminology when it comes to describe order types. As example, instead of Carry Out, you store may use the term “Take-away” or “Pickup”.

Use the field boxes associated with each default order type to enter a new name if so desired. Make sure you press “Save” when finished. The changes made here will appear throughout the admin UI page as well the Web UI pages.

The screenshot shows two sections of the admin UI. The first section is titled 'Statuses' and contains a table with two rows. The first row has 'Accepted' as the name and '299' as the ID. The second row has 'Closed' as the name and '300' as the ID. Below the table are navigation arrows and an 'Add' button. The second section is titled 'Call Center Operators' and contains a table with two columns: 'ID' and 'Login Name'. Below the table are navigation arrows and an 'Add' button.

ID	Name
299	Accepted
300	Closed

ID	Login Name
----	------------

## **Call Center Operators:**

Add and/or edit the call center operators when using the Call Center Mode. Call Center Mode is where operators, instead of the customer, enter the orders and then route them to the appropriate restaurant. Add an operator by :

- Click on the Add Button
- Login Name Field- Enter an unique Login Name (i.e. employees first name)
- Password Field- Enter a unique password
- Confirm Field- reenter the password
- Click on Save button

The screenshot shows the 'Edit Call Center Operator' form. It has a 'Customer ID' label, a 'Login Name' text input field, a 'Password' text input field, and a 'Confirm' text input field. At the bottom, there are three buttons: 'Back', 'Delete', and 'Save'.

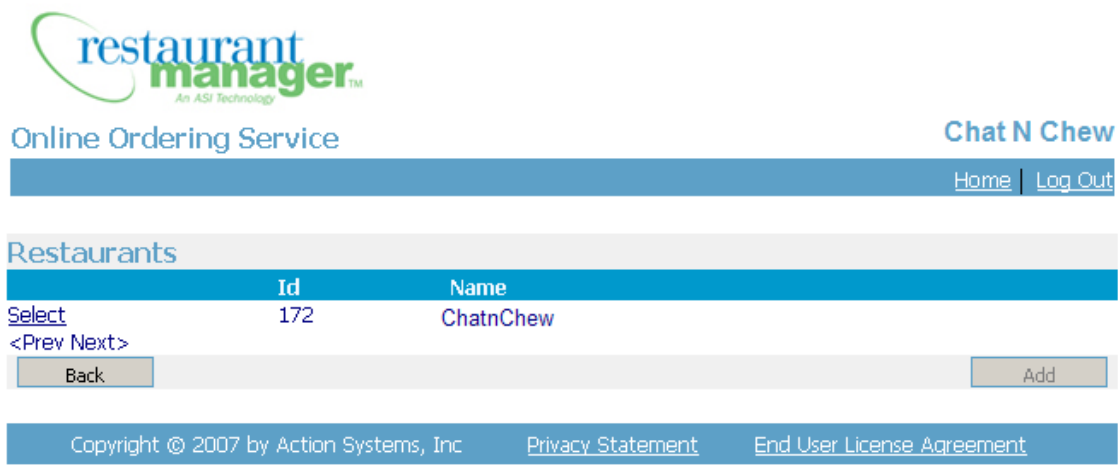
This topic will be discussed in later in the section: [Placing orders via Call center](#) .

**IMPORTANT:** Press the **SAVE** button to save your changes!

## RESTAURANT(S) SETUP FORM

The Restaurant Setup Form contains the data fields for store specific data for information relating to [addresses](#), [stores name](#) and [telephone numbers](#). This form is used for both single or multiple restaurants belong to a chain. In addition, this form contains fields relating to [discounts](#), [delivery minimums](#), and various information sections displayed on the OO Portal.

To access this form, click RESTAURANTS on the [default Admin page](#). It should have a minimum of one store on the list. Click the SELECT button. To change the restaurant name or edit any of the other parameters found on this form.



The Restaurant Setup Form is broken down into eight sections:

1. [General Settings](#)
2. [Order Time Options](#)
3. [Site Appearance](#)
4. [Zip Code Range](#)
5. [Tip Percentages](#)
6. [Operating Hours](#)
7. [Payments](#)
8. [Order Routing Modes](#)

The illustration below is a sample screen shot with some of the fields already populated.

### General Settings

Restaurant ID	67		
Name	Fifers Seafood Restaurant	City	Pasadena
Street Address	8894 Ft. Smallwood Road	Delivery Info	MINIMUM \$30.00 Order for Delivery!
Phone Number	410-360-2826	Restaurant Web Id	fs1
Menu	Fifer's Seafood, Inc.'s Defaul	Pizza Upload	<input type="checkbox"/>
Prep. Time(min.)	25	Delivery Charge	0.00
Time Zone	(GMT-04:00)		
Min.Del. Amt	30.00		
MinOrder Charge Refno	661		
MinOrder Charge Item Discountable	<input type="checkbox"/>		
Discount	Online Discount(10.00%)	applied for orders greater than	0.00
Toppings Pricing	<input type="text"/>		

### Order Time Options

Disallow "Immediate" 
 Disallow "Today" 
 Disallow "Future Date"

### Site Appearance

Menu Title	Menu	Quantity Width	3
Operating Hours Description	***** SAVE 10% WHEN YOU ORDER ON LINE ! *****		
Delivery Hours:	Mon, Tue, Wed, Thu, Sun 11:00 AM - 08:30 PM		

## General Settings

**Restaurant ID:** Number generated by the ASI to uniquely identify the restaurant. Shown for informational purposes only and cannot be edited.

**Name, phone, and address information:** Fill out as appropriate.

**Delivery Info:** Enter information pertaining to your delivery service that you wish your customers to see before they enter a delivery order.

**Menu:** Select the menu you wish to use for this restaurant. Note that this is only applicable if you use more than one menu in your chain. This option is grayed out if there is only one store in the chain.

**Restaurant Web ID:** Enter a unique name for this restaurant. Note what you entered. **You will need to enter this exact same name in the Web Upload set up.**

**Prep Time:** This is uploaded from the RMWIN BackOffice database of the restaurant.

You will need to offset the time to allow for food preparation. EXAMPLE: If it takes 25 minutes to prepare an order and the customer orders food for a 4:30pm take out, the system will print the order 25 minutes before (4:05pm) if this setting is set to 25. This cannot be changed from this [ADMIN page](#)

If the customer then orders a meal from the website and selects “immediately” the customer will see a warning like this:

Login | Home

Restaurant: Fifers Seafood ... → Type/Time → Order → Delivery → Payment → Submit

### Your Order Information

What type of order is this?

When do you want your order?

**Accepting orders at the moment.**  
 Order will not be ready for pick up/delivery until 9/11/2008 1:20:00 PM

### Hours and Directions

**Online hours**  
 \*\*\*\*\* SAVE 10% WHEN YOU ORDER ON LINE ! \*\*\*\*\*

Delivery Hours:  
 Mon, Tue, Wed, Thu, Sun  
 11:00 AM - 09:30 PM

Fri, Sat  
 11:00 AM - 09:30 PM

Carry Out/Pick-Up Hours:  
 Mon, Tue, Wed, Thu, Sun  
 11:00 AM - 09:00 PM

Order was placed at 12:55pm, and prep time is set for 25 minutes.

**Pizza Upload:** Check this option if you want to upload the pizza menu that you’ve set up from RMWIN Back Office. (SET-UP → MENU → PIZZAS)

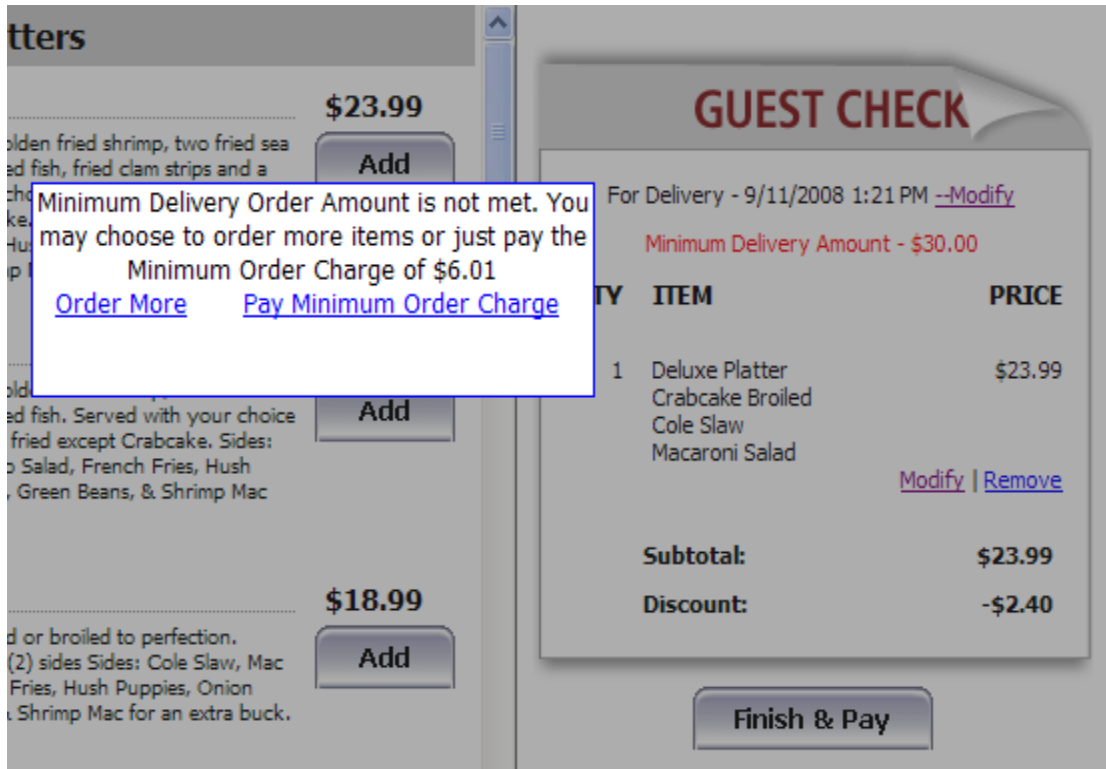
**Time Zone:** You may disregard this; the time zone is pulled from the restaurant’s RM Server

**Delivery Charge:** Amount to add to the price on an order to cover delivery service. This is uploaded from RMWIN Back Office. It cannot be changed here. This is [set up as a tip](#) from RMWIN BackOffice Module.

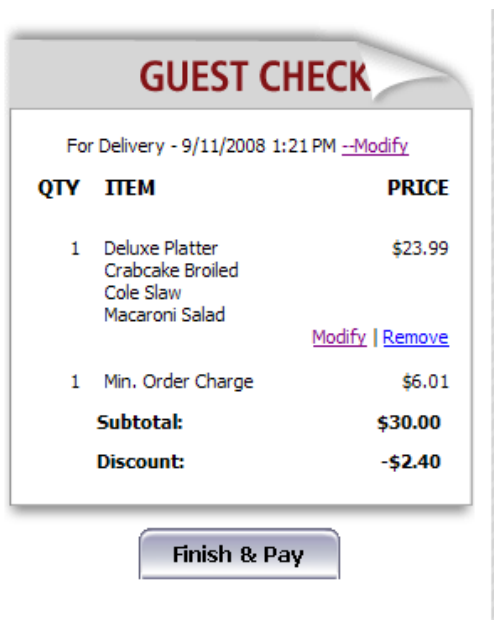
**Min. Del. Amt. (Minimum Delivery Amount):** Enter the dollar amount (if applicable) that is required to accept a delivery order.

**NOTE:** If the customer who is ordering a meal clicks FINISH & PAY, and they have **not** met the Minimum Delivery Amount, they will be offered a choice as shown below:





If the customer selects ORDER MORE, the screen returns to the order page, if they select PAY MINIMUM ORDER CHARGE, the dollar value shown (Difference between their order, and the amount programmed in the Min. Del. Amt.) is added to their virtual guest check. See below.



**MinOrder Charge Refno (Minimum Order Charge Reference Number):** This is uploaded from RMWIN Back Office. It cannot be changed here. This is required if you use the MINIMUM DELIVERY AMOUNT option, as RM needs a place to “dump” the dollar amount (which is random) into. You will need to

set this number up in RMWIN Back Office. Simply choose a menu item, name it something similar, and note it down, as you will need it when you UPLOAD the RMWIN dBase. (You should **not** choose this menu item to be a “web item” when building it in RMWINBackOffice)

**MinOrder Charge Item Discountable:** This is uploaded from RMWIN BackOffice. When building this menu item ([see paragraph above](#)) under the Price Options tab in the Menu Setup form of the RM Back-Office Module, chose whether or not you want the Minimum Order Charge to be discountable when discounting the web order (if applicable).

**Discount:** You may apply a discount exclusive to Online Ordering. This is uploaded from RMWIN Back Office. If no discount appears in the drop-down box, (and it won't when you are first setting up the restaurant here in the ADMIN pages) you will need to add an “Online Discount” (if applicable) from RM BackOffice Module. (SET UP > SETTLEMENT AND TIPS > DISCOUNTS). Additional information on setting up discounts can be found under the section: [Discounts for On Line Use](#).

**Toppings Pricing:** This is a text field for explaining the pizza pricing. It will show up on the web as shown below:

Topping	Whole	1st Half	2nd Half
PEPPERONI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GROUND BEEF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Order Time Options:

**Disallow Immediate:** If you want to allow customers to place orders for immediate pick-up or delivery, leave this field unchecked. To prohibit orders being placed for immediate pick-up or delivery, then check this box.

**Disallow Today:** If you want to allow customers to place orders for a time later in the day, leave this field unchecked. To prohibit orders being placed for later in the day pick-up or delivery, then check this box.

**Disallow “Future Date”:** If you want to allow customers to place orders for future days, either pick-up or delivery, leave this field unchecked. To prohibit orders being placed for future days, either pick-up or delivery, then check this box.

## Site Appearance

**Google Maps:** This option comes enabled by default. You may disable Google Maps by removing the check mark for the field setting.

**Quantity Width:** The number of digits allowed in the quantity box of the order entry screen. See screen shot below:

**Add Item**

Adding **Crab Cakes** to the order ...

Only the finest blue swimming crabs make it into our steamer. No filler, nothing but crab meat and spices. Choice of two sides.

Enter Quantity  ← **Quantity Box**

**Select Modifiers**

**Choose A Side.....(Choose One)**

<input type="radio"/> Tossed Salad	<input type="radio"/> Baked Potato	<input type="radio"/> Fries
<input type="radio"/> Cole Slaw	<input type="radio"/> Sauteed Morrell Mushrooms	<input type="radio"/> Stewed Heirloom Tomatoes
<input type="radio"/> Skillet Beans	<input type="radio"/> Vegetable	<input type="radio"/> none

**Choose A Side.....(Choose One)**

<input type="radio"/> Tossed Salad	<input type="radio"/> Baked Potato	<input type="radio"/> Fries
<input type="radio"/> Cole Slaw	<input type="radio"/> Sauteed Morrell Mushrooms	<input type="radio"/> Stewed Heirloom Tomatoes
<input type="radio"/> Skillet Beans	<input type="radio"/> Vegetable	<input type="radio"/> none

**Operating Hours Description:** This TEXT field is for entering descriptive times and other information about the restaurant.

**Special Offers:** This TEXT field is for entering any promotions the restaurant offers.

**Menu Schedules:** Disregard this field setting. Price schedules are performed in the RM BackOffice.

**NOTE:** Remember to press SAVE! Shows up on web as seen below:

**Hours and Directions**

**Online hours**  
 \*\* Save 10% on ON LINE Orders Over \$35.00 \*\*

We offer Delivery every day from 11:00AM to 11:00PM

We Deliver ZIP CODE 20903 ONLY! If you live outside this zip code, you can STILL ORDER PICK-UP! ! !

Text entered into the Operating Hours description field

Text entered into the Delivery Info field

SPECIAL HOURS for DELIVERY:  
 On FRIDAY & SATURDAY, we DELIVER 'til MIDNIGHT!

Come see our NEW PLASMA BIG SCREEN in our NEW SPORTS BAR.

WHILE dining with us, sign up for our VIP CLUB, and register to WIN a BIG SCREEN TV.

CHAT-N-CHEW specializes in CATERING AND PARTIES, so please give us a call before your next event !!

[Click here for directions.](#)

Text entered into Special Offers field

**Special Offers**

On Tuesday, if you order one Pizza at the regular price, you get the second Pizza FREE!. Mark you calendar!

**Payment Information**

**Payment Options:** Pay at Restaurant, Credit Cards via Mercury  
**Credit Cards Accepted:** Visa / MasterCard /AMEX / Diners



**Additional Information**

We Deliver ZIP CODE 20903 ONLY! If you live outside this zip code, you can STILL ORDER PICK-UP! ! ! If you paid for your order with a credit card, please bring that card with you to the restaurant for verification. This is for YOUR PROTECTION. Thank you.

## Zip Code Range

Enter a single or multiple zip codes if you wish to enforce a delivery area. The maximum postal code digit length to be entered in the US is five and ten for the UK. The following are examples of how to enter postal codes:

- **One postal code-** 55555
- **Two postal codes-** 55555, 55557 (comma must be present and separate the two numbers).

- **A range of codes in numeric sequence-** 55555-55558 (the dash must be present and between the numbers).
- **A range of codes in sequence with others out of sequence-** 55545, 55555-55559

Note: spaces are not required after the comma when separating postal codes and **are** supported if present. Dashes are used to designate a range and should not be used in nine digit postal codes in the United States.

You may also enter zip code ranges using wild card characters (on builds v.17.0.0.16 or later). The wildcards supported are "\*" matching any number of alphanumeric characters and "?" matching single alphanumeric character. Example

- '10??' - matches any 4-character code starting with '10'
- '11\*11\*' - matches codes starting with '11' and having another '11' somewhere inside the code.

To better illustrate zip code ranges using wild cards we will type the following in the "Allowed Zip Range" field:

2090?, 12?45, T3L\*

By doing so we would expect the following behavior:

- For 2090?
  - 20901 (or 20902-20909) - should be allowed because "2090" is within the first two digit criteria range and the all following digits are suitable for the wild card
  - 20910 or 2090123 - should not be allowed because the "1" does not meet the first four digit criteria
- For 12?45
  - 12345 - should be allowed because "12" is within the first two digit criteria range and the 3rd digit is suitable for the wild card
  - 11145 - should not be allowed because the second "1" in the sequence does not meet the first two digit criteria
- For TSL\*
  - T3L-123 - should be allowed (numbers only) -should be allowed because "T3L" is within the first three digit criteria range and all following numbers meet the wild card criteria.
  - T3LAbCd - should be allowed (letters only) -should be allowed because "T3L" is within the first three digit criteria range and all following letters meet the wild card criteria.
  - T3L-1Z3 - should be allowed (mixed) -should be allowed because "T3L" is within the first three digit criteria range and all following letters sand numbers meet the wild card criteria.

Note that OO does not mind the case (lower or upper)... e.g., zip code T3LAbCd can be entered t3labcd

## Tip Percentages

OO picks up Suggested Tip Percentages as set up from RM BackOffice Module->Setup->Settlement and Tips.

## Operating Hours

The Operating Hours configuration gives you full flexibility for programming the allowed times customers can enter **orders according to the type of order**: Carry Out, Delivery or Dine in. You can add as many operating time periods as necessary to accommodate practically any opening times scenario.

**NOTE:** You **must** specify valid operating times for the restaurant! If you don't, the OO link that ASI sent you for the restaurant won't even load.

The screenshot shows the 'Edit Operation Hours' form in the Restaurant Manager Online Ordering Service. The form is for 'Fifer's Seafood, Inc.' and includes the following fields and options:

- ID:** A text input field.
- Name:** A text input field.
- From:** Time selection with dropdowns for 12, 00, and AM.
- To:** Time selection with dropdowns for 12, 00, and AM.
- Day Of Week:** A dropdown menu set to 'Use Override Date'.
- Override Date:** Date selection with dropdowns for 1, Jan, and 2006.
- CLOSED:**
- Delivery Allowed:**
- Carry Out Allowed:**
- Dine In Allowed:**
- Buttons:** Back, Copy, Paste, Delete, and Save.

At the bottom of the page, there is a copyright notice: 'Copyright © 2007 by Action Systems, Inc' and links for 'Privacy Statement' and 'End User License Agreement'.

To setup a new time range, click the "ADD" button and enter the following:

- **Name:** - Name for the operating period. For example "Lunch"
- **From, To:** - Time range for the operating period. If you want the whole day to be unavailable enter 12am to 12am.
- **Day of Week:** - Enter the day of the week for the operating period. If the time range is for every day of the week select the "EVERY DAY" option. Select this option if you plan to program an "Override Date" (see below).

- **Order Type Check boxes:** - Enable the order types allowed for the time period (Delivery, Carry Out, and Dine In) see the section on [Order Types](#) if you need to change names.
- **Override Date:** - Note: this is only relevant if you selected the “Override Date” option for the Day of Week field. Enter the specific date for which you wish to enforce the time period.
- **Precedence order:** When programming your operating hours note that Override Dates trump Week Day settings, and that Week Day Settings trump the Everyday settings.

### **Example: Operating Hours**

Restaurant provides Carry Out service 7 days a week from 11am to 9pm, Delivery Service only on Saturdays and Sundays from 5 to 9pm. Closed on New Year’s Day.

To implement the above you need to create 4 time periods:

#### **Period 1: Carry Out Service Hours**

Name = **Carry Out Service Hours**

From/To = 11am to 9pm

Day of Week = EVERY DAY

Allowed Order Types checked = Carry Out only

#### **Period 2: Delivery Service Hours (Saturday)**

Name = **Delivery Service Hours-Saturday**

From/To = 5pm to 9pm

Day of Week = Saturday

Allowed Order Types checked = Delivery only

#### **Period 3: Delivery Service Hours (Sunday)**

Name = **Delivery Service Hours-Sunday**

From/To = 5pm to 9pm

Day of Week = Sunday

Allowed Order Types checked = Delivery only

#### **Period 4: New Years Day (Closed)**

Name = **New Years Day-Closed**

From/To = 12 am to 12 am

Day of Week = Override Date (set date to January 1)

Enable "Closed" option

Allowed Order Types checked = none

**EXAMPLE: "Other Holidays" –Different Date Each Year (Closed)**

Name = "Name of Holiday"Closed

From/To = 12 am to 12 am

Day of Week = Override Date (set date actual holiday you will be closed)

Enable "Closed" option

Allowed Order Types checked = none

**NOTE:** You *must* specify at **least one set** of valid operating times for the restaurant!

## **Payments**

In this section, you configure the allowed forms of payment for the different services (Delivery, Take Out, Dine In) you might offer. For example: you can enforce prepayment via credit card for Take Out orders, and allow payment upon delivery for delivery orders (you would select PAY AT RESTAURANT in this example). You can also define your own forms of payments by clicking on the Add button.

Payments			
	ID	Name	Enabled
<a href="#">Select</a>	1	Paypal & Credit Cards	True
<a href="#">Select</a>	2	Direct Debit	False
<a href="#">Select</a>	3	Check	True
<a href="#">Select</a>	4	Pay at Restaurant	False
<a href="#">Select</a>	6	Credit Cards via Mercury	True
<a href="#">Select</a>	28	Yes-Pay	False
<a href="#">Select</a>	29	Credit Cards via YesPay	True
< >			
			<input type="button" value="Add"/>

### **PayPal**

If using PayPal, the merchant must first establish a PayPal account. Go to [www.paypal.com](http://www.paypal.com), select the BUSINESS tab, select CREATE ACCOUNT button, select BUSINESS "Get Started" box, choose "Website Payments Standard" from the drop down box, and complete the PayPal process....

Then log into the PayPal account, and:

1. Go to Edit Profile, under "Selling Preferences"; click "Web site Payment Preferences."
2. Turn "Auto Return" to "On" and put "https://webordering.rmwservices.com/process.aspx" in "Return URL". (This URL is actually passed from OO during the transaction request, so it is not strictly required.) You can leave the rest of the settings on the PayPal site at their default



Now that you've set up your PayPal account, enter the following information in the [PayPal/Credit Cards](#) setup screen.

**Payment Settings for Paypal & Credit Cards**

Enabled

API Username

API Password

API Signature

RM RefNo

Delivery

Carryout

Dine In

Custom Name

**Enabled:** Check this box to enable the payment.

**API Username:** Information acquired from Paypal

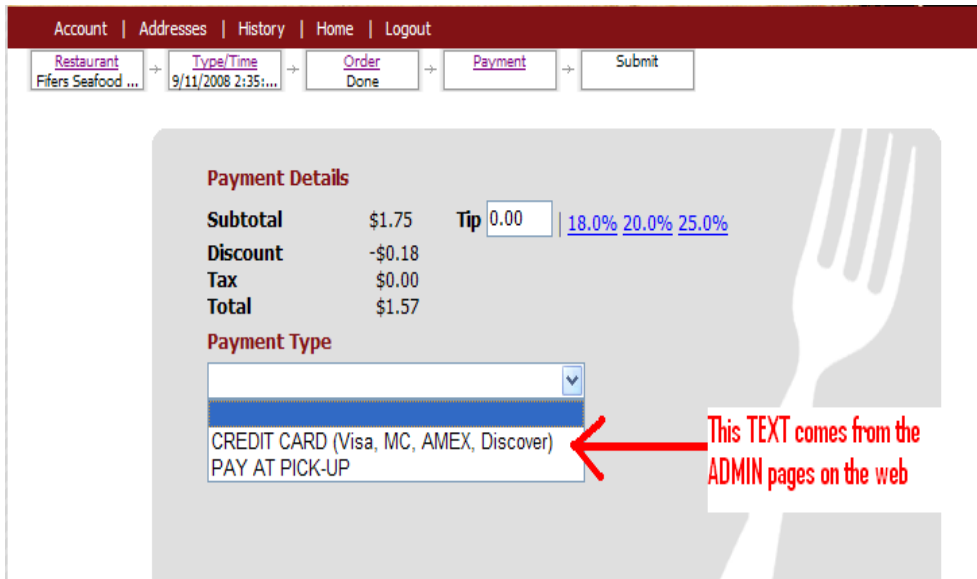
**API Password-** Information acquired from Paypal

**API Signature:** Information acquired from Paypal

**RM RefNo:** corresponding [form of payment ID](#) in Restaurant Manager (not used of Stand Alone installations). This information is found under RMWIN->Setup->Settlement and Tips->Method of Payment. Enter the corresponding number found under the “#” column.

**Delivery, Carryout, Dine In** Enable the revenue centers you will accept Paypal Payments

**Custom Name** – Enter the name you wish the customer to see when they select this method of payment when completing their order on line. See below:



### Credit Cards (via Mercury)

Establish a Mercury online ordering account. Also known as an “E-Commerce Account”.

Credit card accounts for online ordering must be separate from the restaurant’s “brick & mortar” credit card account.

When contacting MPS, at 800-846-4472, make sure to tell the MPS account rep this is for an “ASI Online Ordering Account”. Inform them that it is **not** for the customer’s web site, but for the Online Ordering Portal. Additionally, if the MPS rep asks, the account should “settle automatically” (2am or 3am in the morning).

For online CC payment, you have to create another form of payment in the RMWIN Back Office. (Suggest calling it “On Line Order) Note that the CC payment online is processed online, hence, the “CC Authorization” option in the RMWIN Back Office SHOULD **NOT** be checked for this particular payment form.

Enter the following information in the Credit Cards setup screen:

**Payment Settings for Credit Cards via Mercury**

Enabled

Web Service Url

Merchant Id

Merchant Password

Dine In

Delivery

Carryout

RM RefNo

Credit Cards Accepted

CVV field required  **Check this box to REQUIRE the user to enter the CC security code.**

CVV Match required  **Check this box to enforce a MATCH of code.**

AVS fields required  **Check this box to REQUIRE the user to enter address, zip.**

Address and Zip Match required  **Check this box to enforce a MATCH of the zip code**

Custom Name

Back Delete Save

**Enabled:** Check this box to enable the payment.

**Web Service URL:** enter: https://w1.mercurypay.com/ws/ws.asmx

**Merchant ID:** Enter the Merchant ID of account (provided by Mercury). Include the “=” and following descriptive characters.

**Merchant Password:** Enter the Merchant password provided by Mercury.

**Order Types: (Dine In, Delivery, Carry Out)** Check proper box(s) if credit cards are allowed for the designated order type.

**RM RefNo:** corresponding form of payment ID from RMWIN BackOffice

(Not used with Stand Alone installations).

NOTE: The RM RefNo for Online Credit Cards should neverbe “3”. (The reason is that the Credit Card payment in O.O. should not require C.C. authorization (an option under the payment set-up form) Note that this option is enabled in RM RefNo # 3 because it is set (hard-coded) for VISA

**Credit Cards Accepted:** This text will appear on the front page of the Online Ordering portal, informing customers what cards the restaurant accepts.

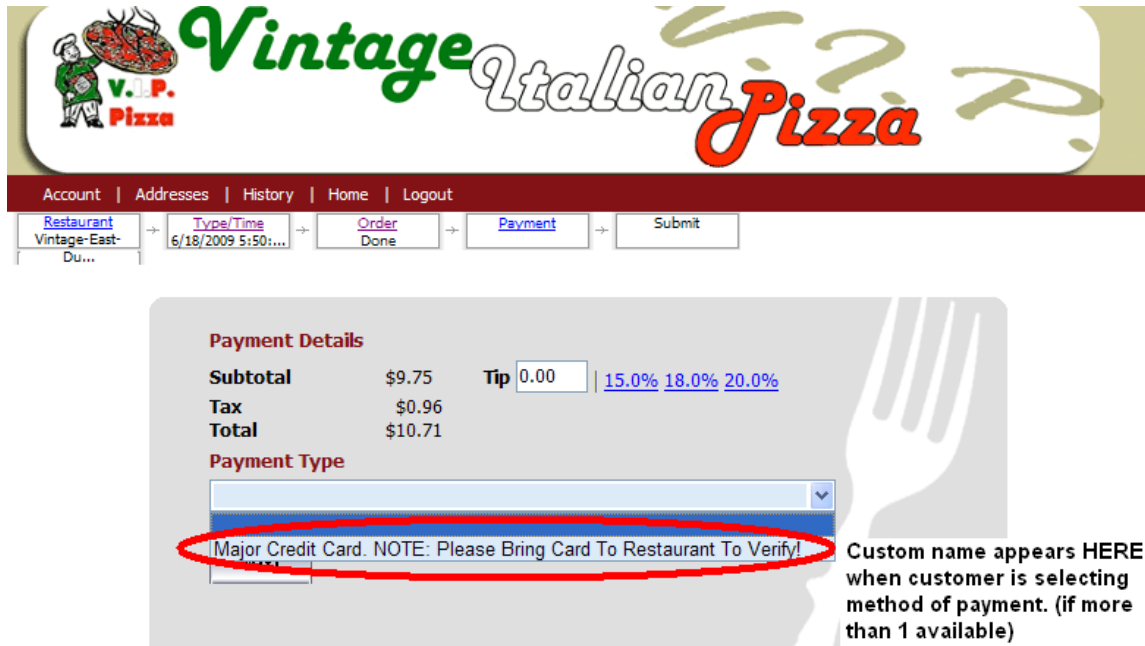
**CVV Field Required:** Check this box if you wish to REQUIRE the customer to enter their credit cards cvv number (found on the back of MC/Visa and the front of AMEX cards).

**CVV Match:** Check this box if you wish to enforce a MATCH of the CVV number (recommended).

**AVS Field Required:** Check this box if you wish to REQUIRE the customer to enter their street address and zip code (recommended).

**AVS Match:** Check this box if you wish to enforce the MATCH of the AVS fields that the customer entered, to what is on file with the CC processor (recommended).

**Custom Name:** Enter what you want the customer to see, when they select their payment method. Suggest something like below:



The following are messages the end user will receive if credit card information is incorrectly entered:

**Incorrect CC#-** "Your payment couldn't be executed. Reason: Invalid Check Digit. Check Acct Number. Click here to reenter credit card information"

**Card not accepted by Restaurant-** This type of credit card is not accepted by merchant, please use alternate credit card

**Credit Card Declined-** "Your payment couldn't be executed. Reason: DECLINE. Click here to reenter credit card information"

**Incorrect CVV#-** "Your payment couldn't be executed. Reason: CVV not matching. Click here to reenter credit card information"

**Incorrect AVV#-** "Your payment couldn't be executed. Reason: Address or zip code not matching. Click here to reenter credit card information"

**Incorrect Zip Code-** "Your payment couldn't be executed. Reason: Address or zip code not matching. Click here to reenter credit card information"

#### Credit Cards via YesPay

YesPay is typically used in Europe / UK only.

**Payment Settings for Credit Cards via YesPay**

Enabled  ← **Make sure this field is enabled**

Delivery

Carryout

Dine In

RM RefNo

Merchant ID

Currency

Credit Cards Accepted

Custom Name

Back Delete Save

Please follow these steps to setup YesPay for Online Ordering:

1. Create a new "Method of Payment" from the RM BackOffice (e.g., Online CC). DO NOT check "CC authorization" or "Allow cash back". (Be sure to check "Enable")
2. Call YESPAY to ask for the "Merchant ID" and "Terminal ID" if they have not provided you yet.
3. Submit the "Merchant ID" and "Terminal ID" to ASI tech support. This is needed for our internal server setup.
4. Access your Admin UI->Payment Settings for Credit Card via YesPay
  - Enable the order type where you will except YesPay as a payment
  - Make sure Credit cards via YesPay is Enabled
  - Enter the [RMRefNo](#) of what you created [step one](#)
  - Enter currency. Call ASI tech support if you do not know your currency ID
  - Enter site's Merchant ID.

In case you encounter errors, access your Admin UI->Error Log. You need to click on the error # and look at the "INNER MESSAGE". You may search the knowledge base for the error that you see.

### **Order Routing Modes**

After a customer has entered an order online, it is sent to the location by using one or all of the routing methods below. Depending on the method used you will have more or less control and functionality.

If your system is integrated to Restaurant Manager POS (The most common scenario) select and enable the RM ADVANCE ORDER option. All orders are routed through the Advance Order module, and then converted to tabs or deliveries, based on the selections detailed below.

### RM Advance Order Mode

You **MUST** enable this mode, to print orders to the Restaurant's printers. All online orders will be sent to Advanced Order first and the converted to either the Tabs or Delivery module.

The screenshot shows the 'restaurant manager' logo at the top left, with the tagline 'An ASI Technology'. The page title is 'Online Ordering Service' and there are links for 'Chat n' Chew', 'Home', and 'Log Out'. The main content area is titled 'Order Routing Mode Settings for RM Advance Order'. It contains several fields: 'Enabled' (checked), 'RM Server's IP Address' (71.252.120.85), 'Emp No' (100), 'Emp Password' (masked with dots), 'Delivery Revenue Center #' (5), 'Delivery POS Sale Type' (Delivery (4)), 'Carry Out Revenue Center #' (2), 'Carry Out POS Sale Type' (Tabs (2)), 'Dine In Revenue Center #' (2), 'Dine In POS Sale Type' (Tabs (2)), 'pre-April 2007 compatibility mode' (unchecked), 'Primary' (checked), and 'Only if primary failed' (unchecked). At the bottom are 'Back', 'Test', and 'Save' buttons. The footer contains copyright information and links for 'Privacy Statement' and 'End User License Agreement'.

**Enabled:** - check this box to enable the interface

**RM Servers IP Address:** Enter the IP address of the RM Server at the restaurant.

(Can use [www.whatismyip.com](http://www.whatismyip.com), or [www.ipchicken.com](http://www.ipchicken.com), to find out what the RM's server IP is.....)

**EMP No / Password:** - Enter the employee number that will be used to process orders at the restaurant. If necessary, [create a "dummy" employee](#) in RM BackOffice Module that will be associated with online orders. Very important: the employee defined here must be logged on at the restaurant for online orders to be processed.

**DeliveryRevenueCenter:** - Revenue Center # used at the restaurant to identify Online Delivery orders. *This setting must be unique if you wish to distinguish between delivery orders initiated by phone and those initiated online.*

**Carry Out Revenue Center:** - Revenue Center # used at the restaurant to identify Online Carry Out orders. This setting must be unique if you wish to distinguish between Carry Out orders initiated by phone and those initiated online.

**Dine In RevenueCenter:** - Revenue Center # used at the restaurant to identify Dine In orders. This setting must be unique if you wish to distinguish between Carry Out orders initiated by phone and those initiated online.

**POS Sale Type:** - Choose what POS Mode (Tabs or Delivery) an order is converted to. This should be set up for each order type.

**Primary & Only If Primary Failed:** - In order to alert the restaurant of an order that has not gone thru, you may if you wish select RM Advance Order to be designated as the “Primary” method of ordering. If this option is selected, and OO cannot for whatever reason pass the order to the restaurant, the “backup method” (if chosen) will be used, and an email will be sent to the ADMIN Email on file, notifying them of the failure. (See below)

**Primary:** Enabling this option means that the online order is voided if the RM Routing Mode fails. If OO cannot pass the order to the POS and this option is enabled, these 3 things happen:

1. Customer sees an error from the Web UI, hence, he will not be thinking that his order went thru
2. The payment made (e.g., credit card) is rolled back meaning customer will not be charged for failed order
3. The Admin will received an email (usually called “order dump email”) detailing the reason for error and the order details of the failed order. The purpose of this email is to notify the Admin of the failure so he can correct it. Please see screen shot below to know where this Admin Email is to be set up.

The screenshot shows the 'General Settings' page for a restaurant named 'Chat n' Chew'. The page has a blue header with 'Online Ordering Service' on the left and 'Chat n' Chew' on the right, with 'Home' and 'Log Out' links. Below the header, the 'General Settings' section is titled and shows 'Restaurant ID 37'. The settings are organized into two columns. The left column contains: Name (Chat n' Chew Cafe), Street Address (612 Oswego), Phone Number (301-445-6100), and Menu (BigByte's Default Menu). The right column contains: Admin Email (empty field), City (Ann Arbor), Delivery Info (We Deliver ZIP CODES 48104 and 48193 only!), and Restaurant Web Id (chow).

**Important:** if Primary option is disabled with an enabled RM Routing Mode, and the RM Routing Mode failed, the online order is not voided if there is another routing mode that passed. For example, if the Email Routing mode is working, the online order is considered “successful” even if the RM Routing Mode failed

**Only if primary failed-** This option cannot be edited when the “primary option” is enabled. This cannot also be edited if there is not even a single mode that is set to primary. If you wish to enable this option in the RM Routing Mode (which is very unlikely), you’d only see the online orders in the POS when the primary mode failed.

### Email

If this interface is enabled, the order will be routed to an email address. Devices that can receive an email range from a standard desktop pc to a Blackberry or cell phone capable of receiving TXT messages

If you are only sending orders to an email account, it is strongly recommended that you use an email handling system that will generate some sort of audible alert when an email is received from the online ordering service. This will minimize missing orders.

## Online Ordering Service

[Chat n' Chew](#)

[Home](#) | [Log Out](#)

### Order Routing Mode Settings for Email

Enabled	<input checked="" type="checkbox"/>
From	<input type="text" value="rmweborder@actionssystem.com"/>
To	<input type="text" value="diano@actionssystem.com, pilcher@actionssystem.com, 4438511"/>
Smtp Server	<input type="text" value="mailserver.actionssystem.com"/>
Primary	<input type="checkbox"/>
Only if primary failed	<input checked="" type="checkbox"/>
<input type="button" value="Back"/>	<input type="button" value="Save"/>

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**Enabled:** - check this box to enable the interface (this means an e-mail will be sent out with EVERY order, even thou it goes to POS also)

**From:** - Enter “rmweborder@actionssystem.com”

**To:** -email address where you want to receive the orders.

**SMTP Server:** - Enter “mailserver.actionssystem.com”

**Primary / Only If Primary Failed:** In order to alert the restaurant of an order that has not gone thru, you may if you wish select Email to be designated as the “Primary” method of ordering.

**Primary:** Enabling this option means that the online order is voided if the Email Routing Mode fails (even if the RM Routing Mode is working). If OO cannot pass the order via email and this option is enabled, these 3 things happen:

1. Customer sees an error from the Web UI, hence, he will not be thinking that his order went thru



2. The payment made (e.g., credit card) is rolled back meaning customer will not be charged for failed order
3. The Admin will received an email (usually called "order dump email") detailing the reason for error and the order details of the failed order. The purpose of this email is to notify the Admin of the failure so he can correct it. Please see screen shot below to know where this Admin Email is to be set up.

## Online Ordering Service

Chat n' Chew

[Home](#) | [Log Out](#)

### General Settings

Restaurant ID **37**

Name	<input type="text" value="Chat n' Chew Cafe"/>	Admin Email	<input type="text"/>
Street Address	<input type="text" value="612 Oswego"/>	City	<input type="text" value="Ann Arbor"/>
Phone Number	<input type="text" value="301-445-6100"/>	Delivery Info	<input type="text" value="We Deliver ZIP CODES 48104 and 48193 only!"/>
Menu	<input type="text" value="BigByte's Default Menu"/>	Restaurant Web Id	<input type="text" value="chow"/>

**Important note:** if **Primary** option is disabled with an enabled Email Routing Mode, and the Email Routing Mode failed, the online order is not voided if there is another routing mode that passed. For example, if the RM Routing mode is working, the online order is considered "successful" even if the Email Routing Mode failed.

**Only if primary failed** - This option cannot be edited if "primary option" is enabled. In addition, this cannot be edited if there is not even a single mode that is set to primary. If you wish to enable this option in the Email Routing Mode (which is the very likely case), you'd only receive the email when the primary mode failed.

**Important note:** if **Only if primary failed** option is disabled with an enabled Email Routing Mode, email is always received (as long as the Email Routing Mode is working) no matter if the primary mode fails or not. See Tip below.

**TIP!** If the settings are the following:

- RM Routing Mode = enabled, primary is checked
- Email Routing Mode = enabled (nothing else is checked)

Owner would still get EVERY COPY of the order via email even if the RM Routing Mode has failed. **This is how flexible OO is!** Note though that the "order dump" email is only sent when the primary fails.

The advantage of having the email sent "only if primary fails" is that when owner receives such email, then he knows that the RM Routing Mode is failing. However, because many owners want to get an

email of every order, you might suggest doing the "only if primary fails" with Fax Routing Mode (note though that this may not be needed if he receives the "order dump" email).

## Fax

In the case of a fax interface you must place the fax machine at a location where someone can continuously monitor it so that orders are not missed. Alternatively you can enable the phone alert option, so that you receive a phone call every time an order is sent via this method. Note that it is your responsibility to contact the customer in case of a problem with the order, such as an out of stock situation or a delay in the order preparation. The faxed order contains all the information you need to contact the customer.

**Enabled:** - check this box to enable the interface

**From:** - enter "rmweborder@actionsystems.com"

**To:** - In the US and Canada enter "XXX-XXX-XXXX@Myfax.com", where <XXX> is the fax number where you wish to receive the orders. International phone number should not contain spaces or dashes. The fax must be in the format 1-area code-number (In US & Canada only- this does not apply to oversea numbers)

**SMTP Server:** - address for SMTP server.

**Primary / Only If Primary Failed:** In order to alert the restaurant of an order that has not gone thru, you may if you wish select "Fax" to be designated as the "Primary" method of ordering.

**Primary:** Enabling this option means that the online order is voided if the Fax Routing Mode fails (even if the RM Routing Mode is working). If OO cannot pass the order via fax machine and this option is enabled, these 3 things happen:

1. Customer sees an error from the WebUI, hence, he will not be thinking that his order went thru
2. The payment made (e.g., credit card) is rolled back meaning customer will not be charged for failed order
3. The Admin will received an email (usually called "order dump email") detailing the reason for error and the order details of the failed order. The purpose of this email is to notify the Admin of the failure so he can correct it. Please see screen shot below to know where this Admin Email is to be set up.

General Settings

Restaurant ID **37**

Name	Chat n' Chew Cafe	Admin Email	<input type="text"/>
Street Address	612 Oswego	City	Ann Arbor
Phone Number	301-445-6100	Delivery Info	We Deliver ZIP CODES 48104 and 48193 only!
Menu	BigByte's Default Menu	Restaurant Web Id	chow

**Important Note-** if primary option is disabled with an enabled Fax Routing Mode, and the Fax Routing Mode failed, the online order is not voided if there is another routing mode that passed. For example, if the Email Routing mode is working, the online order is considered “successful” even if the Fax Routing Mode failed

**Only if primary failed-** This option cannot be edited if “primary option” is enabled. This cannot also be edited if there is not even a single mode that is set to primary. If you wish to enable this option in the Fax Routing Mode, you’d only receive the fax when the primary mode failed.

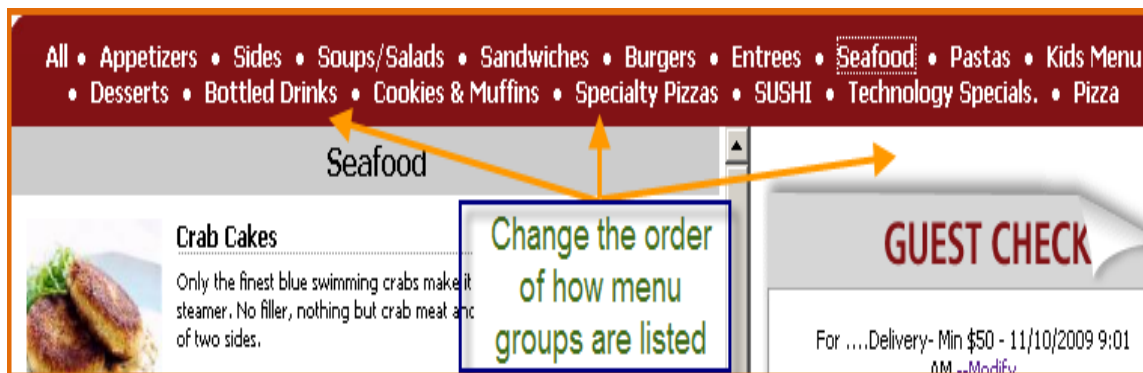
**Important note:** if **Only if primary failed** option is “disabled” with an enabled Fax Routing Mode, fax should always be received (as long as the Fax Routing Mode is working) no matter if the primary mode fails or not.

**NOTE ON FAXING:** *When* the fax will be sent depends solely on Myfax.com. There is usually a short delay.

**MENU (GROUPS ORDER & MENU ITEM ORDER AS THEY APPEAR ONLINE)**

This information is uploaded from the RM BackOffice Module, and is here only for viewing the online menu. Menu Item Setup must be done from RM BackOffice Module (RMWIN->Menu Setup). See “Selecting Items to Sell Online” in the ” RM Back Office” section of this document for details on how to select and configure the items sold online.

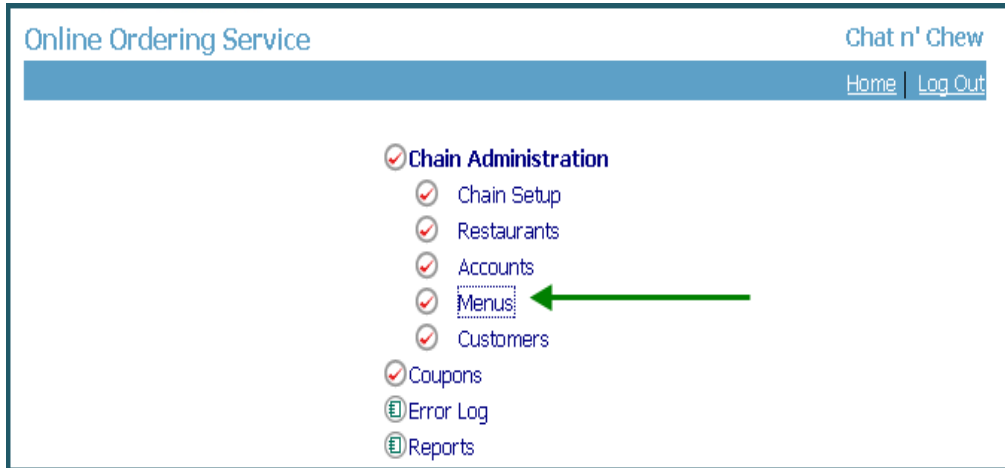
However, you can change the order in which the [menu groups](#) and [individual menu items](#) appear on the on line pages regardless of how they are uploaded from the RM BackOffice module.



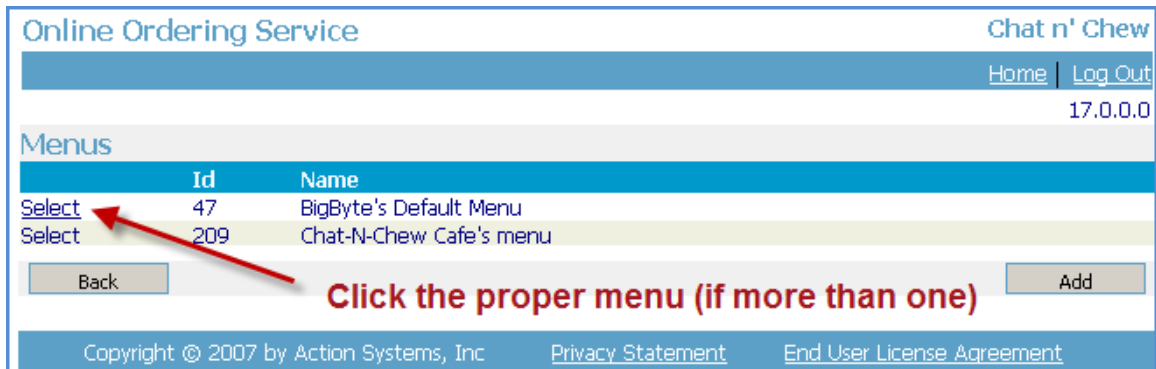
## Changing the GROUPS Order

Use the following steps to change the order of how menu groups are arranged on the OO customer portal:

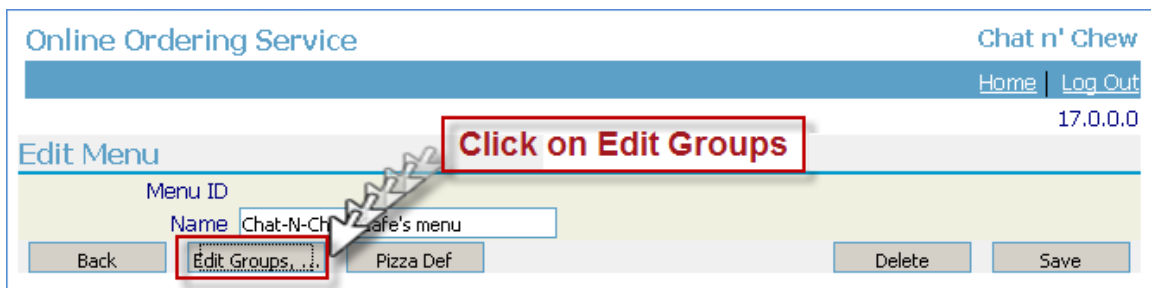
1. On the Chain Administration page, select the MENU option.



2. Select the proper menu. (if more than one)



3. Click the EDIT GROUPS button. The default menu is the order in which the groups are originally set in the RM BackOffice Module.



4. Click the GROUPS ORDER button

Item Groups			
	ID	Name	Active
<a href="#">Select</a>	6271	Appetizers	True
<a href="#">Select</a>	6272	Sides	True
<a href="#">Select</a>	6273	Soups/Salads	True
<a href="#">Select</a>	6274	Sandwiches	True
<a href="#">Select</a>	6275	Burgers	True
<a href="#">Select</a>	6280	Desserts	True

< >

[Groups Order](#) [Add](#)

Click on Groups Order to access the screen where you can change the order of groups and how they appear on the restaurants OO portal

From here you can now reorder the way the groups will appear online.

- Now select the group you wish to re-order, and click either UP or Down.

Online Ordering Service Chat n' Chew

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### Menu Groups Order

Appetizers  
 Sides  
 Soups/Salads  
 Sandwiches  
 Best Sandwich Example  
 Retail  
 Technology Specials.

Back Up Down Save

Use the Up and Down buttons to arrange the Group Order

## Changing the MENU ITEMS Order

Use the following steps to change the order of how menu items are arranged on the OO customer portal:

All • Appetizers • Wings • Soups/Salads • Sides • Pastas • Burgers • Sandwiches • Seafood • Entrees • Pizza • Kids Menu • Desserts • Cookies & Muffins • VIP Club • SUSHI • Specialty Pizzas • Freq Buyer Club • Draught Beer

### Appetizers

**Fried Mozzarella** \$4.25  
EVER TRY GOAT CHEESE? WE DID, AND LOVED IT. THESE MOZZ STIX ARE MADE FROM REAL GOAT MILK. LOWER IN FAT, AND NO TRANS-FATS. YUMMY. 6 TO AN ORDER

**White Pizza** \$2.75  
TOP IT HOW YOU WANT, ALLOW AN EXTRA 10 MINUTES FOR US TO MAKE THE SAUCE FRESH

**Filled Skins** \$5.95  
NOTHING GOES TO WASTE AT THIS PLACE! WHEN WE MASH OUR TATERS, WE SAVE THE SKINS, SO WE CAN FILL 'EM WITH TASTY MORSALS FOR YOU. SERVED WITH SOUR CREAM, CHEESE, AND BACON BITS. (POOR PORKEY)

#### GUEST CHECK

For Delivery - 1/21/2009 2:41 PM [--Modify](#)

QTY	ITEM	PRICE
<b>Subtotal:</b>		<b>\$0.00</b>

Can change the order in which the menu-items appear, independent from how they are uploaded from the restaurant's dBase

1. To change the order, click the MENU option.

Online Ordering Service
Chat n' Chew

---

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- Chain Administration**
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  - Restaurants
  - Accounts
  - Menus ←
  - Customers
- Coupons
- Error Log
- Reports

2. Select the proper menu. (if more than one)

Online Ordering Service Chat n' Chew

[Home](#) | [Log Out](#)  
17.0.0.0

### Menus

	Id	Name
<a href="#">Select</a>	47	BigByte's Default Menu
<a href="#">Select</a>	209	Chat-N-Chew Cafe's menu

**Click the proper menu (if more than one)**

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3. Click the EDIT GROUPS button.

### Item Groups

	ID	Name	Active
<a href="#">Select</a>	6271	Appetizers	True
<a href="#">Select</a>	6272	Sides	True
<a href="#">Select</a>	6273	Soups/Salads	True
<a href="#">Select</a>	6274	Sandwiches	True
<a href="#">Select</a>	6275	Burgers	True
<a href="#">Select</a>	6280	Desserts	True

**Click on Groups Order to access the screen where you can change the order of groups and how they appear on the restaurants OO portal**

4. Select the group that the ITEMS YOU WISH TO RE-ORDER are in

### Item Groups

	ID	Name	Active
<a href="#">Select</a>	6271	Appetizers	True
<a href="#">Select</a>	6272	Sides	True
<a href="#">Select</a>	6273	Soups/Salads	True
<a href="#">Select</a>	6274	Sandwiches	True
<a href="#">Select</a>	6280	Desserts	True

**Select the Group containing the menu items you want to change**

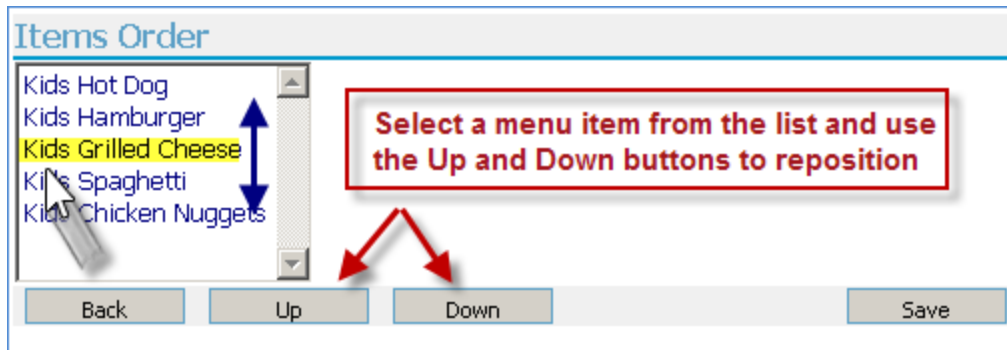
5. Then Click ITEMS ORDER.

### Items in group Kids Menu

	ID	Name	Description	Price	Active
<a href="#">Select</a>	64769	Kids Hot Dog	All beef hot dog. Served with chips.	6.9500	True
<a href="#">Select</a>	64770	Kids Hamburger	Smaller version of our grass-fed whopper. Served with fries. Come with only ketchup. Add other condiments if you like!	6.9500	True
<a href="#">Select</a>	64771	Kids Grilled Cheese	Just enough for Junior. Served with chips. Available on Wheat, Rye, or White.	6.9500	True
<a href="#">Select</a>	64772	Kids Spaghetti	Whole-Wheat N	6.9500	True
<a href="#">Select</a>	64773	Kids Chicken Nuggets	Cage Free, Org:	6.9500	True

**Click the Items Order button after selecting the Menu Group containing the item, to re-arrange the items in the group**

6. Select the menu item you wish to re-order, and then click either UP or Down.



### ***DON'T FORGET TO PRESS SAVE!***

Repeat this process as many times as necessary, for each item. In most cases, it will not be necessary to use the ITEMS ORDER, as the items will display in the order entered in the Menu Setup (RM BackOffice Module). However, ITEMS REORDER gives the restaurateur additional flexibility.

### **NOTE On "Timing" of Web Updates:**

It is advisable to try to limit any changes you make to your online ordering application during times when on line orders are NOT accepted. Though rare, there is the slight chance that while making changes on the web thru the ADMIN pages, while at the same time a customer is attempting to order, may result in an error. This does NOT apply to menu items being updated from RM Back Office, and then uploaded to the Web.

## **Pizza Setup**

Pizza setup is typically done within the Pizza Matrix setup form located in the RM BackOffice Module. This information is uploaded from the RM BackOffice Module; any fields relating to Pizzas are only for viewing the online menu.

## **COLORS ON ONLINE ORDERING PORTAL**

If your client wants the banners or separators on the Online Ordering Portal to be a different color, perhaps to more closely match their web site, please forward the color information to ASI.

**This completes the ADMIN pages portion of the Online Ordering set up.**

**However, you will now need to go to the RM BackOffice Module on the local PC / Server onsite at the restaurant, where the Online Orders will be printed, to complete the *Integrated* Online Ordering set up.**

**You *do not* need to go into Accounts, Customers, Error Log, or Reports. These fields are more informational and have no fields relating to setup. However, additional setup may be required in the [Coupons](#) form.**



Online Ordering Service Chat n' Chew

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17.0.0.0

- Chain Administration
  - Chain Setup
  - Restaurants
  - Accounts
  - Menus
  - Customers
- Coupons
- Error Log
- Reports

The information below provides more detail about: Accounts, Customers, Error Log, and Reports.

## ACCOUNTS

In this area, you may set up several different administrators who can make changes to the Online Ordering account, thru the ADMIN pages. Effective September 29, 2008 there is only one level of security. Use "9" when entering the security level.

### Chain Administrators

	Id	Login Name
<a href="#">Select</a>	286	Jimmy
<a href="#">Select</a>	379	ChatnChewAdmin

<Prev Next>

Click on the "Select" link on the admin's corresponding row to enter Administrator information:

### Edit Administrator

Account ID: 286

Login Name:

Password:

Confirm Password:

Level:

Administers:

Remember to press "Save" when finished.

## CUSTOMERS

ASI's Online Ordering captures the email address of every customer who orders, and those who log on, but don't place an order. These addresses may be exported to third party email programs for marketing purposes, or to ASI's E-Mail club.

Customers for all the restaurants in a chain are kept in the same database. This allows the Online Ordering System to be used in Call Center mode, where operators, instead of the customer, enter the orders and then route them to the appropriate restaurant.

## **Synchronizing Customer Databases**

If your system allows processing takeout and delivery orders from the POS as well as from your web site then you have to periodically run a utility (synccust.exe) to synchronize the POS and Online customer databases so that they reflect the same customer information.

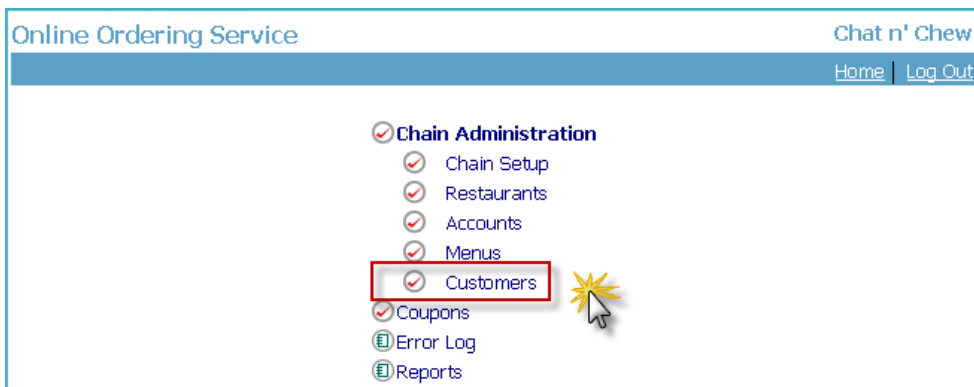
## **Email Merge From Online Ordering to ASI's E-Mail Club**

If the account is also set up with a corresponding email club, ASI can automatically merge all of the email addresses harvested from those clients who have signed up as online ordering customers, into the email club.

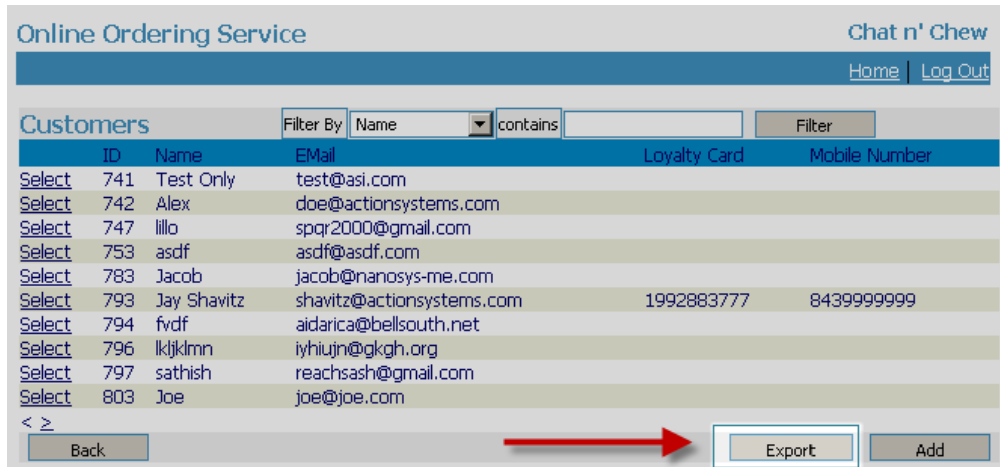
## **Exporting E-Mail Addresses**

Before attempting to export the email addresses, you must have MS Excel loaded on the computer you are working from. From this Chain Admin screen do the following to export customers:

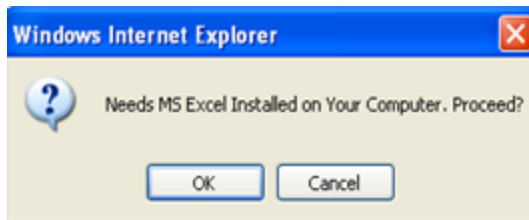
1. Select CUSTOMERS option:



2. A Customer screen similar to below will appear. Select EXPORT.



A warning that you need MS Excel will appear, click OK if you have MS Excel. SAVE or OPEN the file that is being created.



Once that file is OPENED in MS Excel, you may reformat per your individual needs.

See the Email Club User Manual, page 8, for details on formatting the file for IMPORT into ASI's Email Club. Get the manual at: <http://www.actionssystem.com/rmmailclub.pdf>

Note: you can use the filters on the top of the Customers form to target specific customers. See the section on [Report Filters](#) for more information on the use on filters.

## COUPONS

An alternative method to using [discounts](#) to drive business is the use of Coupons (fixed dollar discounts). The setup of the actual coupon is performed in the RM BackOffice Module in the Menu Setup form by creating a negative priced menu item. A more detailed coupon setup description can be found under the section: [Dollar Discounts For Online Ordering](#).

**Note: the process of setting up coupons is not the same as the regular Coupon functionality employed at the POS. You need to use a menu item for coupons.**

Once the coupon (fixed dollar discount) has been uploaded to the admin site you can proceed to apply and enable the coupon by doing the following:

1. Click on Coupons option on the Admin UI page
2. Access the Admin UI->Restaurant Setup->Coupon Settings section to record the allocated menu group(s). If only one group is allocated, that group number is entered in both fields (i.e., in "1st Menu Group" and "Last Menu Group")
3. Go back to the Menu Setup Form in the RM BackOffice to upload the menu. Even though these items are marked as "web items", they will be invisible from the online menu because they are under the coupon-group-range
4. When upload is finished, Coupon Table is now populated. At this point, the user needs to enter in the following fields:
  - **CODE**- the digits in the field can be alpha numeric (i.e. LZ1SH9). Keep in mind that the customer will have to know this code prior to entering the OO web page.
  - **COUPON AMOUNT**- Where the price of the coupon is typically setup in the RM BackOffice; you can override the price in this field. However, changing the price of a coupon here will not be accurately reported in the RM BackOffice Module.
  - **MIN. CHECK AMOUNT**- The min dollar amount before coupon can be applied.
  - **Active**- activates or deactivates coupon to be used.

The screenshot shows the 'Edit Coupon' form within the 'Online Ordering Service' interface for 'Chat n' Chew'. The form includes the following fields and controls:

- Coupon ID**: Restaurant: Chat n' Chew
- Name**: \$10 Off
- Code**: [Empty text input field]
- Coupon Amount**: -10.00
- Min. Check Amount**: 0.00
- Active**:

At the bottom of the form, there are three buttons: 'Back', 'Delete', and 'Save'.

5. When all of the above is completely set up, the Customer can now enter the coupon code on the Order Entry Screen on the Web UI. Upon pressing [Verify], the dollar discount is applied when min order amount is met. Code entry screen can be seen on the OE Screen so customer can apply coupon while ordering. If coupon is not entered during order entry, it can be done on the Payment Screen.

**GUEST CHECK**

For ...Delivery- Min \$15 - 4/30/2010 11:15 AM --  
[Modify](#)

Minimum ...Delivery- Min \$15 Amount - \$15.00

QTY	ITEM	PRICE
1	Steamed Shrimp	\$5.95
		<a href="#">Modify</a>   <a href="#">Remove</a>
<b>Subtotal:</b>		<b>\$5.95</b>
<b>Discount:</b>		<b>-\$0.60</b>

It should be noted that the above steps are only done on the initial setup. When new coupons are added, user only needs to define the menu items (under the pre-defined groups) then upload the menu and complete the Coupon setup from the Admin UI.

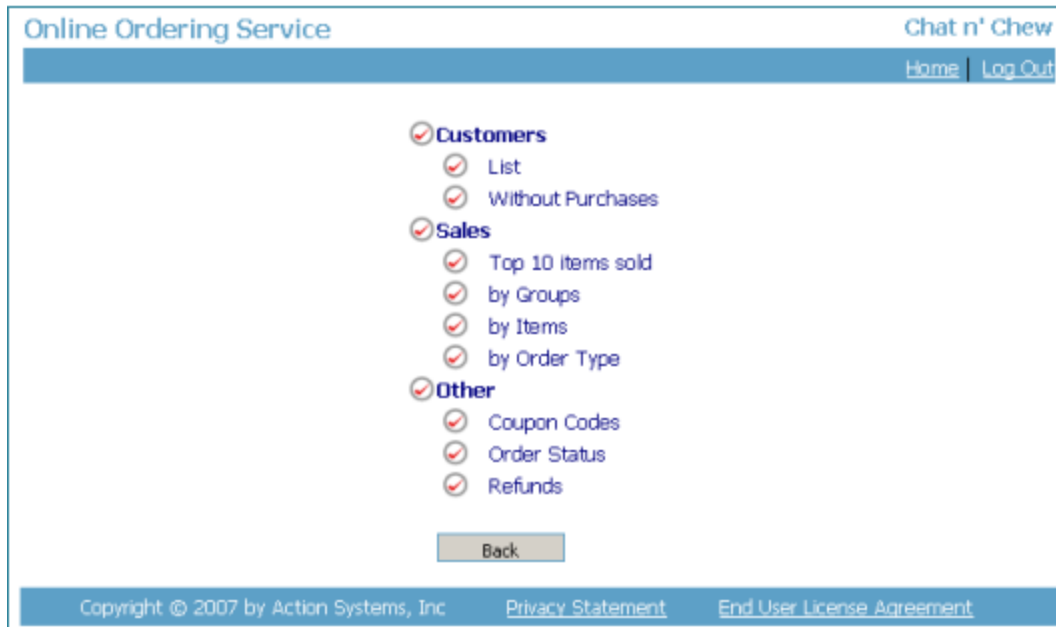
Further, when wanting to temporarily disable a coupon, the user only needs to deactivate it from the Admin UI->Coupons List. He may use the [Delete] function to delete the coupon from the Admin UI. Note though that if item is not deleted from the Menu Setup Form, it gets uploaded again the next time a menu upload is done.

## ERROR LOG

The primary use of the error log is to assist ASI developers and tech support personnel in determining the reason an error occurred.

## REPORTS

Various reports are available online, for review of the online orders. On Line reports allow you to view customers who have purchased items, registered but not purchased items, various sales reports, and miscellaneous reports covering Coupon Codes, Order Status, and Refunds. On line reports are meant to compliment the reports found in the RM Report Module where the bulk of reporting will be done.



## **Reports Filters**

On Line Reports allow you to track customers who have or have not made purchases. For this reason ON Line reports provides filters to help you better manage information. The filter section of the report form has three parts:

- **Filter by-** List the available filters
- **Condition Filters-** use the filters to further qualify search results. The filters used here are typically used to restrict a search. Example: the "=" filter will return exact results for data entered in the Data Entry Field.
- **Filter Data Entry Field-** types the information you are filtering. The information can be full or partial telephone number, name, address, etc. The information entered should relate to the filter type selected. Example: when selecting the Phone number filter the data entered should be numeric.

Once all fields have been completed, you must select the "Add Filter" button. Filters can be removed by selecting the "remove" button.

As example, we want to find when a customer registered for on line ordering. We happen to have the customer's telephone number. We will use the "Customers" reports to find the information. In the illustration below, we used the phone number filter, used the "=" Conditional filter, and the entered the phone number for the customer". We then pressed the "Add Filter" button and then selected the "Execute" button to run the report.

**Filter Field**      **Conditional Filters**      **Data Entry Field**

**Customers**

**Filters**

Filter by: Phone Number = 555-555-5556      Add filter

Phone Number = 555-555-5556      remove

**Sort**

Sort By: Name      Add column

Execute      Back      **Report Results**

Name	Address	Phone Number	City	Zip Code	Registration Date
John	1234 Main	555-555-5556	Centerville	55555	3/31/2009 8:08:00 PM

## Adding Filters

You can add a many filters as needed to refine you search. In our next example we want to run a report for customers who have registered but have not made a purchase so we can send coupons encouraging the customer to make a purchase. We will run the “Customers without Purchases” report; use the Name filter, “Contains” in the Conditional filter field, and type “Test” in the Data Entry field. The illustration below shows the results:

**Customer without Purchases**

**Filters**

Filter by: Name Contains test      Add filter

Name Contains test      remove

**Sort**

Sort By: Name      Add column

Execute      Back      **Results**

Name	Address	Phone Number
test	123 sssss	222-334-3211
test	test	508-123-1231
test	test	616-555-1212
test	asdfa adfaf	766-345-7656

Perhaps we want to refine our search by address. To do this will add an additional filter using the Address filter, “Contains” in the Conditional filter field, and type “Test” in the Data Entry field. The illustration below shows the new results:

Note: Filters may vary depending on the report.

**Customer without Purchases**

**Filters**

Filter by: Address Contains test

Name Contains test  ← **1st Filter**

Address Contains test  ← **2nd Filter**

**Sort**

Sort By: Name

**New Results**

Name	Address	Phone Number
test	test	508-123-1231
test	test	616-555-1212

## Sorting

The sorting function for On Line Reports is particularly useful on reports with large amounts of data. For these types of reports you can use the “Sort” filter. This is a simple function only requiring you to click on the Sort By filter drop down menu, choose a filter from the list, and then select the “Add Column” button. The Add Column button simply adds the designated filter to the report.

As an example we want to know what our top selling pizzas are. We will run the By Group report found in the Sales section of the Online Reports. In the filter section we will use the Item Group filter and look for menu groups containing the “pizza’. Next, we will use the sorting filter the list the lowest to highest selling pizzas using the Income sorting filter. After pressing the Execute button to run the report we get the following result as pictured below.

**Sales by Groups**

**Filters**

Filter by: Item Group Contains pizza

Item Group Contains pizza  ← **Group Filter**

**Sort**

Sort By: Income  ← **Sorting filter**

Income

Item Group	Income
Specialty Pizzas	0.00
MI PIZZAS	7.99
LRG Pizzas	49.95
EX Pizzas	59.96
MED Pizzas	89.91
M Pizzas	90.93
SM Pizzas	183.77
LG Pizzas	230.82

Note: the Income filter will only sort from lowest to highest.

## Running and Printing Reports

Once the filters are defined you must use the “Execute” button to run the report. Most reports are printed using your web browser print function.



## Order status

The Order Status report deserves some special mention. This report tells us the status of pending orders. This report is particularly useful when a customer calls stating they have not received their order. You can use this report to verify the order was received and if the order was accepted. You can view the particular order detail information by using the “print” button on the order row.

	Id	Restaurant
<a href="#">Select</a>	252	Mexican Restaurant Sample: Under Construction
<a href="#">Select</a>	37	Restaurant Manager's OnLine Ordering for ver.16
<a href="#">Select</a>	190	United States: OnLine Ordering v.17

<Prev Next> **Use the Select option to view a single restaurants information (if running more than one restaurant)**

Back

Details	Requested For	Customer	Phone	Elap. Time	Type	Paid	Print	Status
<a href="#">details</a>	1/7/2010 1:02:00 PM	susan	123-908-1234	168503 min.	Delivery	False	<a href="#">print</a>	<a href="#">Accepted</a>
<a href="#">det.</a>	Printable Order - Mozilla Firefox				arryout	False	<a href="#">print</a>	<a href="#">Accepted</a>
<a href="#">det.</a>	File Edit View History Bookmarks Tools Help				arryout	False	<a href="#">print</a>	<a href="#">Accepted</a>
<a href="#">det.</a>	http://webordering.rmwservices.com/v17.0.AdminUI/PrintableOrder.asp				elivery	False	<a href="#">print</a>	<a href="#">Accepted</a>
<a href="#">det.</a>	<b>Customer</b>				elivery	False	<a href="#">print</a>	<a href="#">Accepted</a>
<a href="#">det.</a>	Name	susan	Address	1234 Main St	arryout	False	<a href="#">print</a>	<a href="#">Accepted</a>
<a href="#">det.</a>	State	CA	Loc. Info	5694	arryout	False	<a href="#">print</a>	<a href="#">Accepted</a>
<a href="#">det.</a>	City	Centerville	Phone Number	555-5555	elivery	False	<a href="#">print</a>	<a href="#">Accepted</a>
<a href="#">det.</a>	Zip Code	55555	Email		elivery	False	<a href="#">print</a>	<a href="#">Accepted</a>
<a href="#">det.</a>	<b>Order Details</b>				arryout	False	<a href="#">print</a>	<a href="#">Accepted</a>
<a href="#">det.</a>	5 x	French Dip		2 on potato roll & 3 on rye	elivery	False	<a href="#">print</a>	<a href="#">Accepted</a>
		Potato Roll						
	10 x	Evia Water						
	10 x	Cole Slaw						
	5 x	Reuben		2 no sauerkraut				
		Rye						
	12 x	Chocolate Chip Cookie						

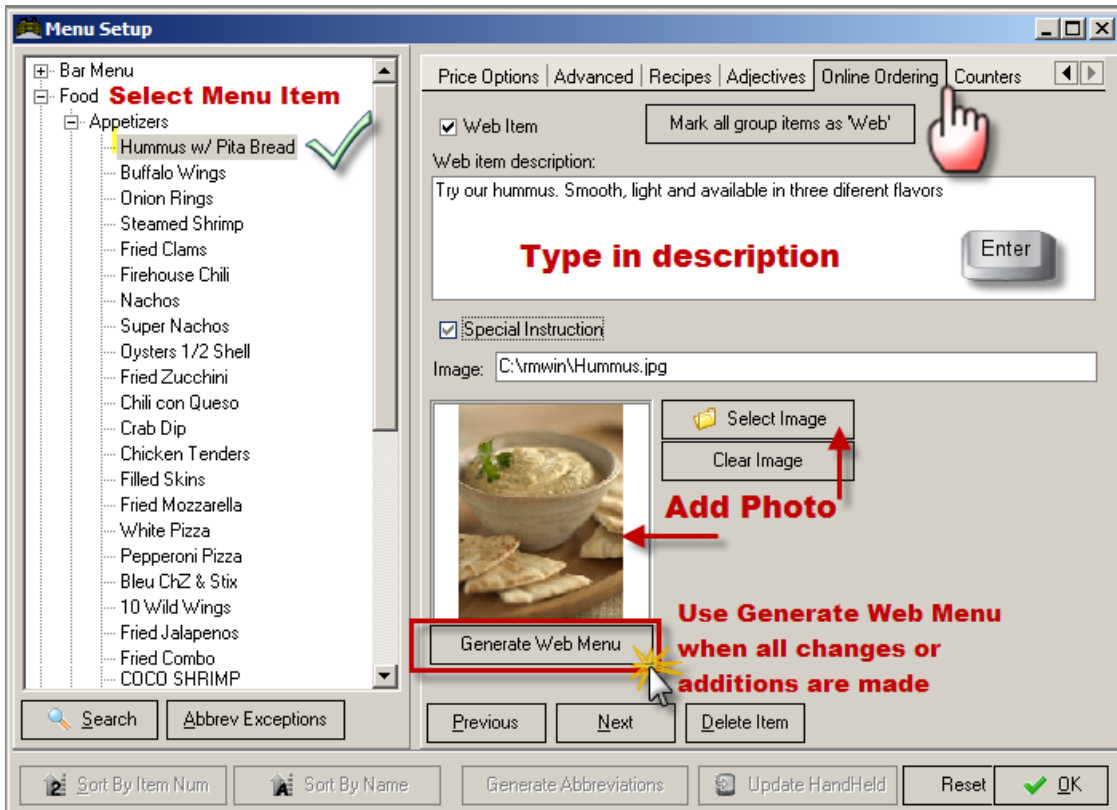
# RESTAURANT MANAGER BACK OFFICE SETUP (RM BACK OFFICE)

Certain settings in the RM BackOffice Module must be set so that RMWIN can properly communicate with the On Line Ordering portal.

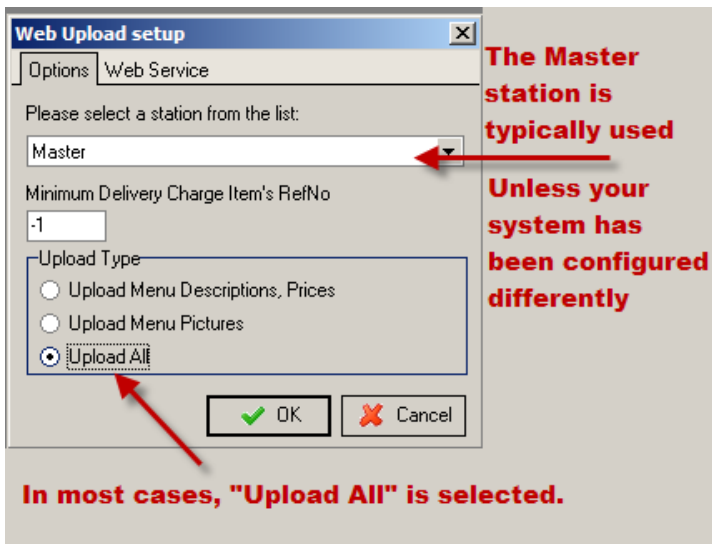
## **PHOTOS & MENU ITEMS TO DISPLAY ONLINE (FROM RM BACK OFFICE)**

Adding and modifying web menu items is a similar process to the POS. In fact, if you are already a RMPOS user there will be very little you will have to do when adding On Line Ordering to your system. Typically, all you will have to do is make some data additions under the Online Ordering tab of the Menu Setup Form for any menu items offered online. Use the following steps in the Menu Setup Form in Restaurant Manager BackOffice Module to add or modify existing menu items for online ordering offerings:

1. Select the item from the menu tree.
2. Select the "Online Ordering" tab for the item.
3. Check the "Web Item" box.
4. Enter a long text description of the item. This is what the on line customers will see. Make this description "Sizzle". You are selling your item here.
5. Enable the Special Instruction setting if you allow customers to enter special requests for menu items. Leave the setting blank if you do not want customers to place special requests outside standard modifiers.
6. Include a good photo. Pictures sell! If available, enter a photo of the item (preferred size is 300 x 300 pixels at 72dpi) Photos can be re-sized using numerous different shareware or freeware services such as [www.webresizer.com](http://www.webresizer.com), just do a Goggle-search. If the photos are bigger than 80K, you will be presented with a "warning window" and an ID of each photo that is larger. The photos will still upload, but may take longer to appear when the customer goes to the online web page. It is suggested that all photos should be kept in the working rmwin directory.

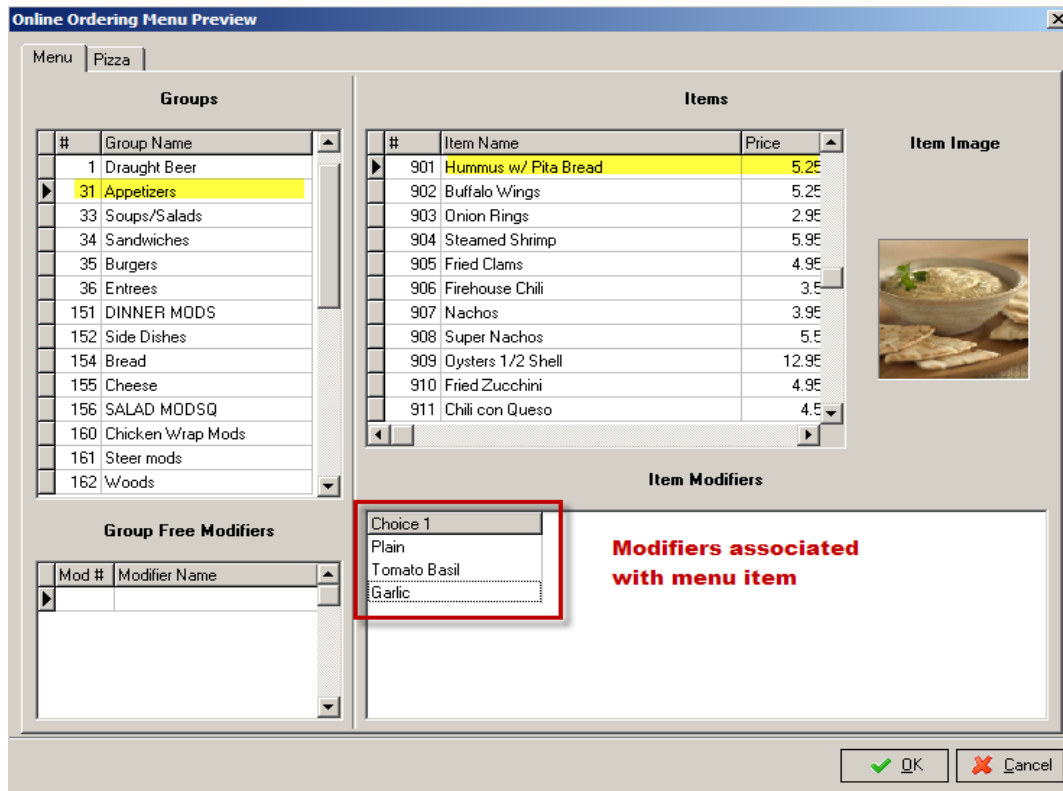


7. Once all the items are selected, click on the “Generate Web Menu” button. A screen similar to below will pop up. Make your selections, and press OK.

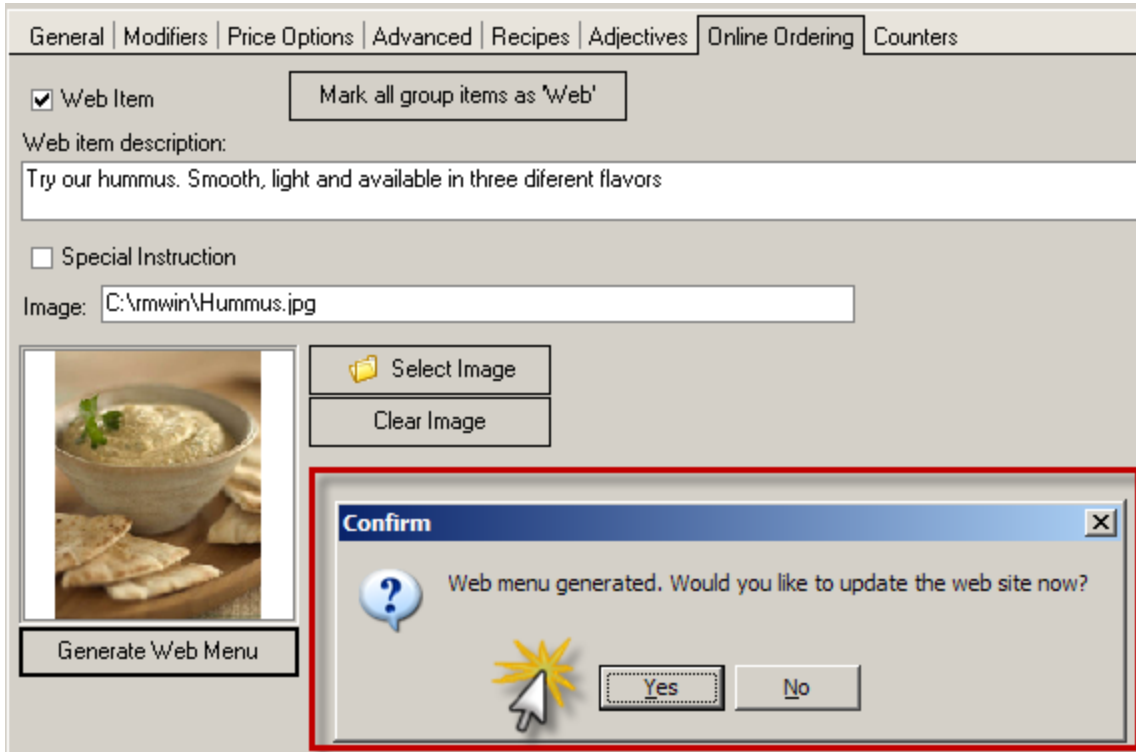


8. Click OK
9. After several seconds you will get a preview screen similar to the one below. Use this screen to verify that all the items you wish to sell online are present. Note that you can even check the

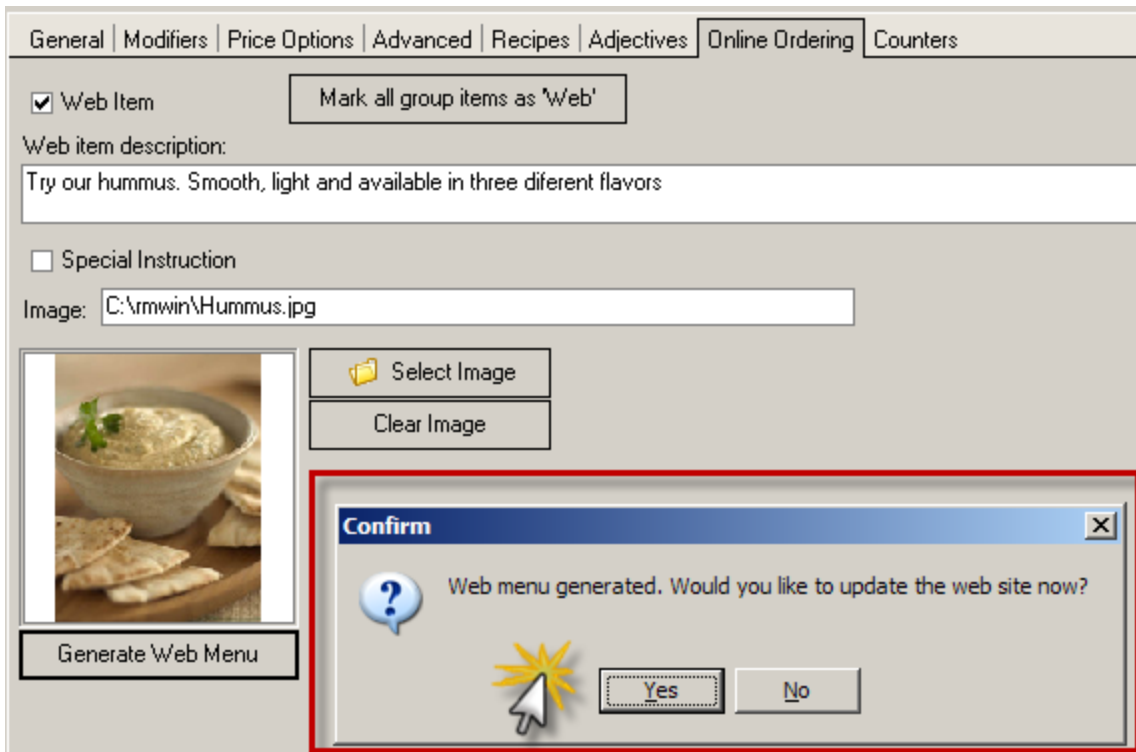
modifiers for each item in the Item Modifiers pane by clicking/scrolling through the items in the Items pane. If everything is correct, click on the OK button in the Preview screen to finalize the upload process.



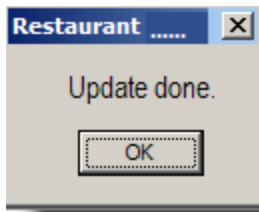
- Click on the "Yes" button to start the update process. Depending on the size of the menu/pictures, this might take a couple of minutes to complete.



11. A progress bar will appear (pictured below), as the menu and pictures (if selected) begin to upload menu items will be the first to upload, followed by menu pictures.



12. When finished, click OK. The RM database is now available on line.



## ON LINE ORDERING EMPLOYEE SET-UP

OO Coupons (Dollar Discounts) must be uploaded to the Admin UI similar to other menu items available to web ordering. However, this should not be done until the Coupon Settings form in the Admin UI has been completed. Additional setup must be done starting on the Admin UI page only after you have set up the OO Dollar Discounts. More on this is covered in the section: [Coupons](#)

In order for On Line Ordering (Integrated) to accept orders, the session must be open, and the designated On Line Ordering employee must be logged in. NOTE: If your restaurant is set up to automatically close the session, and log out employees at a certain time after close, it will result in "shutting down" the On Line Ordering option, until the designated on line employee is logged back in. One option is to switch the restaurant to "[24 hour mode](#)" but the ramification of should be carefully considered as it may affect regular restaurant operations. Regardless, you must have an employee setup specifically for On Line Ordering. Employee Set Up is preformed in the RM BackOffice Module > Setup > Labor > Employees> Employee Setup Form, Make sure the security level for the "On Line" employee is set to a level to that allows sending and printing items.

No	Name	Logged In
97		<input type="checkbox"/>
98		<input type="checkbox"/>
99		<input type="checkbox"/>
100	Online Order	<input checked="" type="checkbox"/>
101		<input type="checkbox"/>
102		<input type="checkbox"/>
103		<input type="checkbox"/>
104		<input type="checkbox"/>
105		<input type="checkbox"/>
106		<input type="checkbox"/>
107		<input type="checkbox"/>
108		<input type="checkbox"/>
109		<input type="checkbox"/>

#	Hourly Rate	OT Rate	Job Classification
1	0	0	00
2	0	0	
3	0	0	
4	0	0	
5	0	0	


You may also want to set up a JOB CLASSIFICATION, just for the online ordering employee, for more detailed reporting or other. If so, In the RM BackOffice Module go to SETUP > LABOR/JOB CLASSIFICATION and make your selections. You will want to minimize the use of prompts and make sure the job class can create a new transaction and allow transfers.

## OO REMINDER

On Line Orders will not be process if a designated [OO Employee](#) is not logged in. To aid in this process, ASI created an executable named OOReminder.exe to warn when an OO Employee is not

logged. The OOReminder.exe can be run from any computer on the network including a POS station. The program can also run from more than one computer if needed. It is suggested that the executable be placed on a computer used on a regular basis.

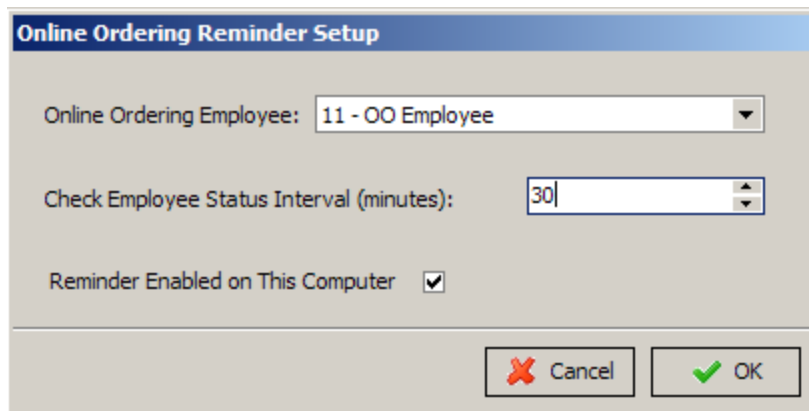
## **OO Reminder Setup**

Some minor setup is required to run OOReminder. You will need to access OOReminder program from the computer you will be utilizing the application. You can access the program by performing a right click on the OOReminder icon  in the systray and choose the Setup option. In the OO Reminder Setup form fill in the following data fields:

**Online Ordering Employee-** Select the designated OO Employee from the Employee list using the drop down menu

**Check Employee Status Interval-** This field is measured in minutes. RM will scan the logging status of the employee selected in the increment selected. Select a value you are comfortable with.

**Reminder Enabled on This Computer-** Place a check mark in the field if this is the computer you will be using. You can run this executable on more than one computer at a time and will have to be enabled on each Click the OK button once the fields have been completed. OOReminder will return to the systray.

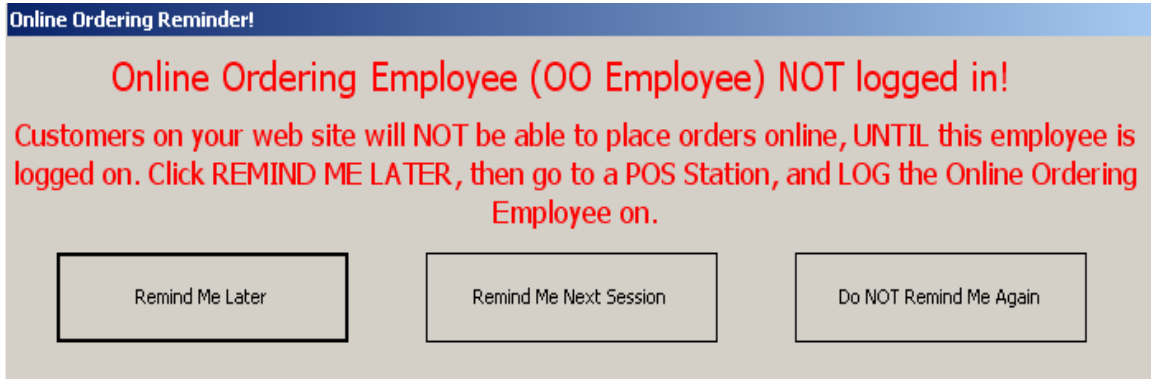


The screenshot shows a dialog box titled "Online Ordering Reminder Setup". It contains the following fields and controls:

- Online Ordering Employee:** A dropdown menu with the selected value "11 - OO Employee".
- Check Employee Status Interval (minutes):** A text input field containing the number "30".
- Reminder Enabled on This Computer:** A checkbox that is checked.
- Buttons:** "Cancel" (with a red X icon) and "OK" (with a green checkmark icon).

## **OO Reminder Operation**

The message you received when the designated Online Order Employee will be similar to the illustration below:



You must choose one of the message options listed. At this point you have the option to log in the designated OO Employee. The options presented at the bottom of the screen will perform the following operations:

**Remind Me Later**- will suspend the message until the next interval time

**Remind Me Next Session**- will suspend message until next open session. This message will only appear again if the session is opened and the OO Employee is not logged in.

**Do NOT Remind Me Again**- will suspend message until next open session. This message will only appear again if the session is opened and the OO Employee is not logged in.

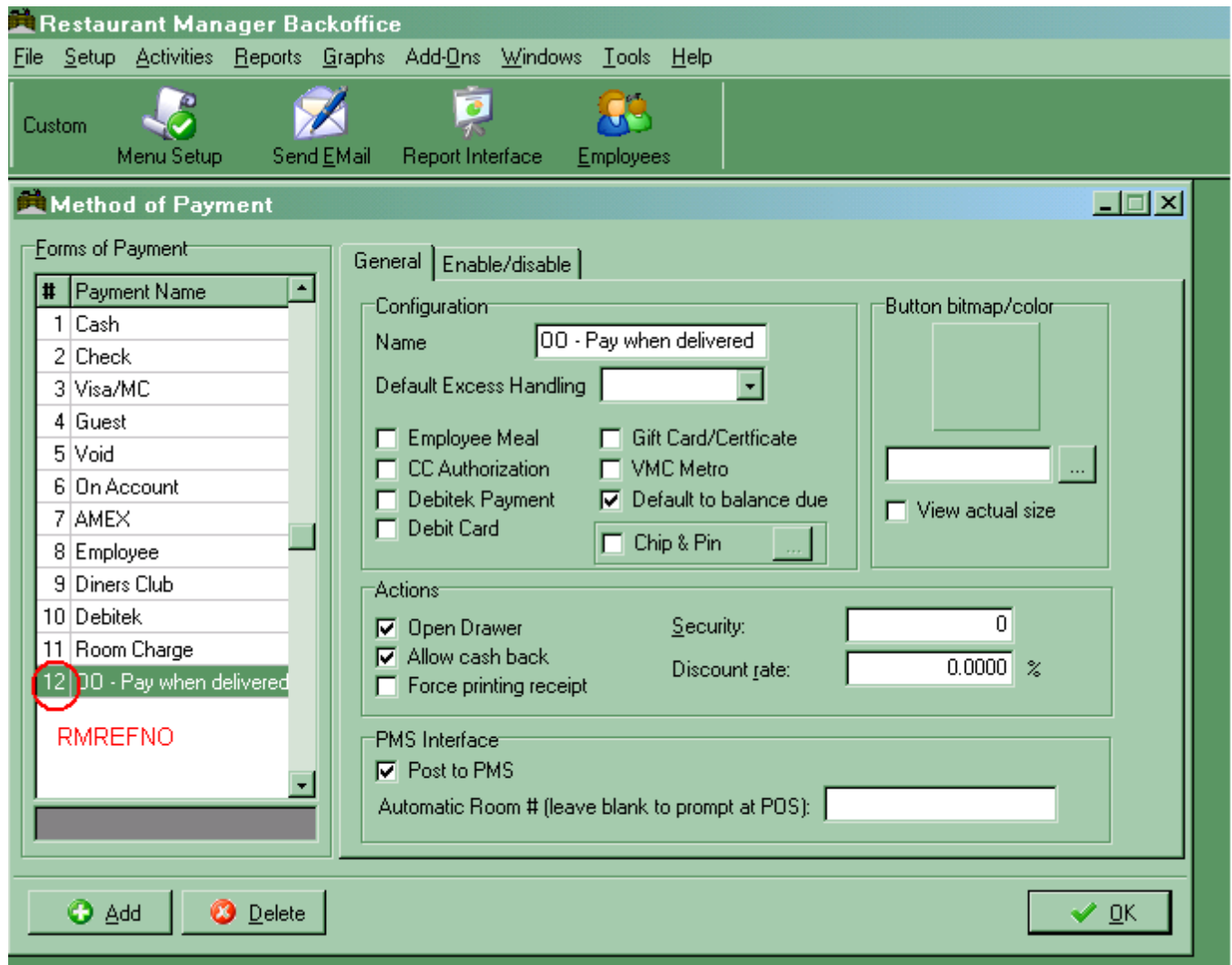
## **REVENUE CENTERS**

For each TYPE of On Line Ordering you have (Carry-out, Delivery, Dine-In) you should have a corresponding revenue center set up in RM Back Office. Make sure to properly configure the revenue center so that items print in the proper location, and that orders that go to that revenue center follow the conventions used for that type of order. (carry outs print/don't print, etc.)

## **METHOD OF PAYMENT FROM RM BACK OFFICE**

In the RM BackOffice Module, you must also set up a new method of payment, and probably call it "On Line Orders" or something similar. The reference number (or payment number) you create in RM BackOffice is the RMREFNO that you will enter in the Online Ordering general setup/payments. You may choose to have only one method of payment in setup in the RM Back Office Module linked to all of the On Line Ordering payments, or, you may set up a separate method of payment in the RM BackOffice for **each** of the corresponding On Line Ordering payments.





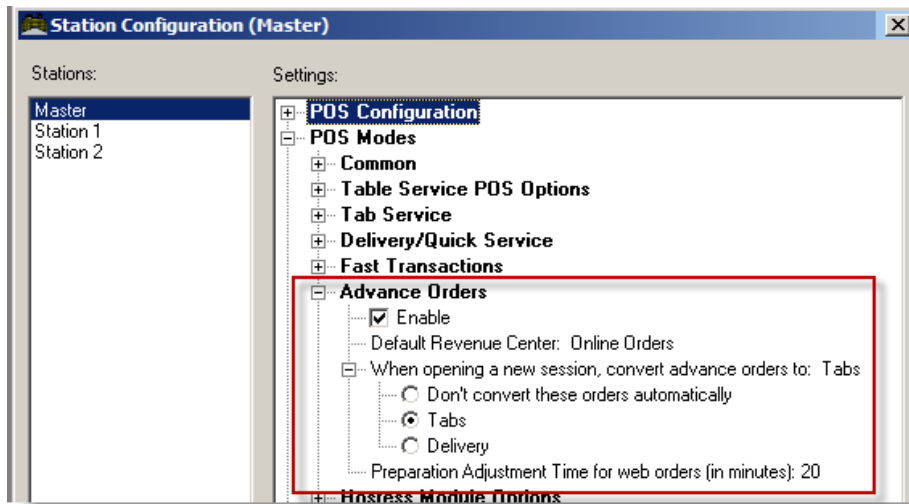
If the restaurant takes credit card and allows for “payment upon pickup” on line, it is suggested that you have two separate methods of payments set up in RM BackOffice for each.

### **ADVANCE ORDERING MODULE**

The Advanced Ordering Module must be enabled under the Advance Orders (POS Modes) section in the RM BackOffice Station Configuration for all stations (including Master Station) where you want orders to appear. The Advanced Ordering Module is included when you purchase On Line Ordering module.

Advance orders can be automatically converted to Tabs or Delivery orders on the date they are active. The conversion occurs when opening the session. If you do want advance orders to convert automatically at Session Open, you must choose either Tabs or Delivery under the Advance Orders (POS Modes) section in the RM BackOffice Station Configuration. You will need either the Tab or Delivery Module enabled in the Station Configuration for orders to process correctly. If you do not want orders to convert automatically, select the option "Don't convert these orders automatically" under the Advance Orders (POS Modes) section in the RM BackOffice Station Configuration.

Orders will remain in the Advance Ordering screen and must be converted manually if you want to process the order early. If left untouched, they will convert at the appointed time. Default value: Don't convert these orders automatically



Restaurant Manager can be configured using Station Configuration settings to affect the way on line orders are processed at Session Open. Let's look at a few example when we configure the system with the following settings and use the Tabs Module:

1. Session is opened at 5 am everyday
2. At Session Open, convert to Tabs is set in Station Configuration.
3. Preparation Adjustment Time for web order is set for 20 minutes in Station Configuration.

**Example #1-** Here's what happens at 9 AM, customer does IMMEDIATE ORDER

- **On the Web page**, OO advises customer that order cannot be ready until 9:20 AM

At POS:

- order converts to tab immediately
- order is printed immediately

**Example #2** - Here's what happens at 9 am, Customer enters LATER TODAY for 5 PM when ordering on line:

- order converts to tab at 4:40 PM
- order is printed at 4:40 PM

**Example #3-** Here's what happens at 9 AM when a customer does FUTURE ORDER for 12 noon tomorrow when ordering on line:

- order converts to tab at 5 AM
- order is printed at 5 AM

**Example # 4-** If Session Open is set to “DON'T CONVERT” in Station Configuration, the only difference is in example #3. Here's what happens:

- order converts to tab at 11:40 AM the next day
- order is printed at 11:40 AM the next day

## TABS OR DELIVERY MODULE

Either the Tabs or delivery Module MUST be enabled.

## DELIVERY MINIMUM ORDER

From the menu Setup Screen, go to any menu item in the food area, and create a new menu item called Minimum Delivery Charge. **Do not set this as a web item.** You may or may not set this as DISCOUNTABLE. Make a note of this menu item's PLU number.

The screenshot shows a software interface for menu item setup. The 'General' tab is active. The 'Item Name' is 'Minimum Delivery Charge'. The 'In Stock' field contains '9999.000' and is accompanied by an 'Inactive' checkbox. The 'PLU' field contains '1801'. A red arrow points from the '1801' value to a text box labeled 'Menu's Item Number'. Other fields include 'Prep Area Desc', 'Category' (set to '(no category)'), 'Prices Cost' (set to '0.00'), and 'Button bitmap/color'.

## FIXED DELIVERY FEE

You may or may not want to set a FIXED DELIVERY FEE. The fee is set-up as a gratuity in both Station Configuration and the default revenue center. You may also set up the delivery charge as a menu item. Please consult the RM Manual section [Delivery Charge as a Menu Item](#) for specific instructions. Note that there's a difference between how the delivery charge will be displayed on the Guest Receipt vs. the Confirmation Email that the customer receives. The guest check will have the delivery charge displayed as a menu item while the confirmation email will display it as delivery charge.

## CUSTOMER RECEIPT

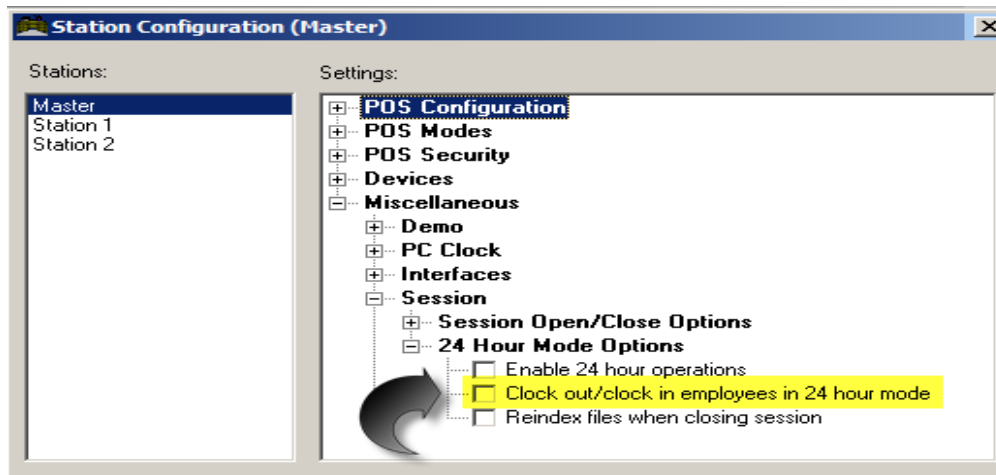
Discuss with the owner what message they want to have print at the bottom of ALL customer receipts, but especially Dine-In guest checks. Many locations will use this receipt as a “form” to collect email addresses, by printing a message something like this. “Next Time You Need to Order for Carry-Out or Delivery, Go To [www.FifersSeafood.com](http://www.FifersSeafood.com) And You Can SAVE 10% By Ordering On Line”

“Print your email address below, and drop it off at the cashier for a chance to win a meal for two....”

## 24 HOUR MODE OPERATION

It is advised that all sites linking to ASI’s On Line Ordering system “turn on” the 24 hour mode in RMWIN RM Back Office. (Station Configuration) Problems can occur if the 24 hour mode is NOT enabled, and an order is placed online for “immediate pick-up”, but the session is closed.

Be sure to check other settings that may be affected by enabling the 24 hour mode.



## DISCOUNTS FOR ON LINE USE

Offering a discount for customers to use On Line Ordering helps incent the customer to do so, and takes some of the pressure “off” the restaurant’s phone lines.

Version 17 On Line Ordering allows your restaurant the choice of choosing between two discount methods. One discount method is to incorporate a [percentage discount](#). This method will take a pre-determined percentage off all items on the guest check. The second method is to take a [fixed dollar amount](#) off the check. Note that only one discount can be in use at any time with On Line Ordering.

## Percent Discounts For On Line Ordering to Use

Standard percentage discounts may be defined on the Discounts Setup Form in the RM BackOffice to apply discounts to individual items or to an entire check. Most restaurants offer discounts on all items on the entire check for ON Line Ordering. The percentage amount of any standard discount for On Line Orders must be a “fixed” discount. Restaurant Manager does allow you to exclude certain categories of menu items from specific discounts. For instance, a restaurant that offers an ON Line Discount might not apply this discount to items with a Group Type of “Liquor”. Individual Menu Items may also be configured as “Non-discountable”. Once a discount has been created, you can proceed to the Restaurant UI page to enable and [select the discount for use](#).

Use the Discounts Setup Form to create an unlimited number of pre-defined percentage discounts:



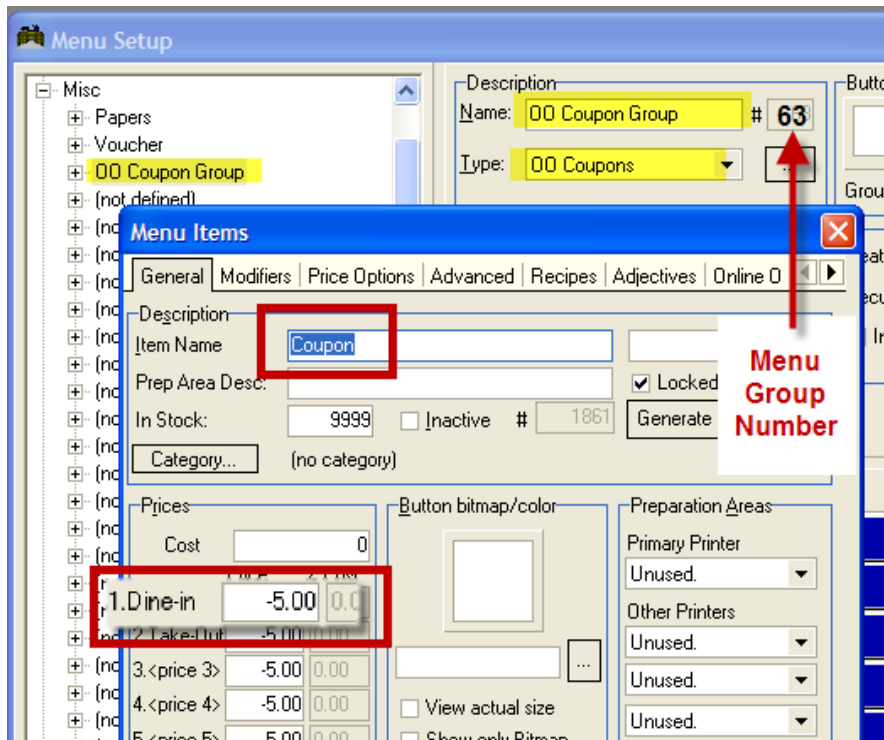
Use the **[Add]** button at the base of the form to add blank fields for configuring new discounts. Then use the following fields to configure the new discount:

- **Discount Name**- Use this field to type in the name of the discount (i.e. "OnLine Order")
- **Percent**- Use this field to define the percentage amount of the discount.
- **Security Level**- Make sure this field is marked as "Zero"
- **Fixed**- This field must be marked with an "X" or enabled.
- **Group Type**- This column lists all the categories of menu items defined on the Group Types Setup Form.
- **Apply Discount**- Click on the field beside each Group Type to indicate whether the discount you are defining should or should not be applied to those items categorized as belonging to a particular Menu Group Type. (Use your mouse to toggle between "Yes" and "No").

## **Dollar Discounts For On Line Ordering to Use**

Dollar Discounts (Coupons) are created and defined in the Menu Setup form in the RM BackOffice module. You will need to follow the standard menu setup procedures described in the Restaurant Manager Manual. Below is a brief description of the process:

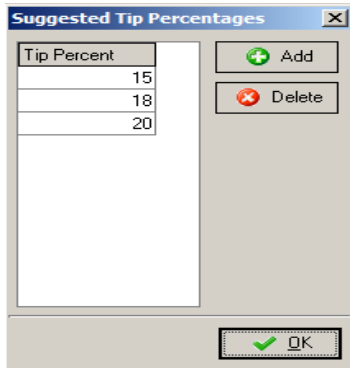
1. **In the Group Type Setup Form-** create and name a new Group Type appropriate for your establishment (i.e. OO Coupons). Make sure taxes are applied in accordance with local laws.
2. **In Menu Setup Form-** create and name a new menu group suitable for your store (i.e. OO Coupon Group). Make a note of the menu group number being used: you will need this number later on when configuring coupons on the Admin UI page.



3. **Under the new menu group-** create and name coupons fitting for your purposes. Here you will define the description and values of each item (i.e., Coupon). The coupon dollar value is entered as a negative price and should be in PRICE #1. Under the Online Ordering Tab of the menu item, make sure the "Web Item" checkbox is enabled on each item.
4. Additional setup will need to be done in the [OO Admin Coupon Setup Form](#)

### **TIP PERCENTAGES:**

You can configure your On Line order system to show "Suggested Tip Percentages" show up in the payment screen. If you wish to implement this function, you must configure the percentages in the RM BackOffice Module > Setup > Settlement and Tips > Suggested Tip Percentages.



(continued in Payments)

## Restaurant Manager Back Office Setup (RM Back Office)

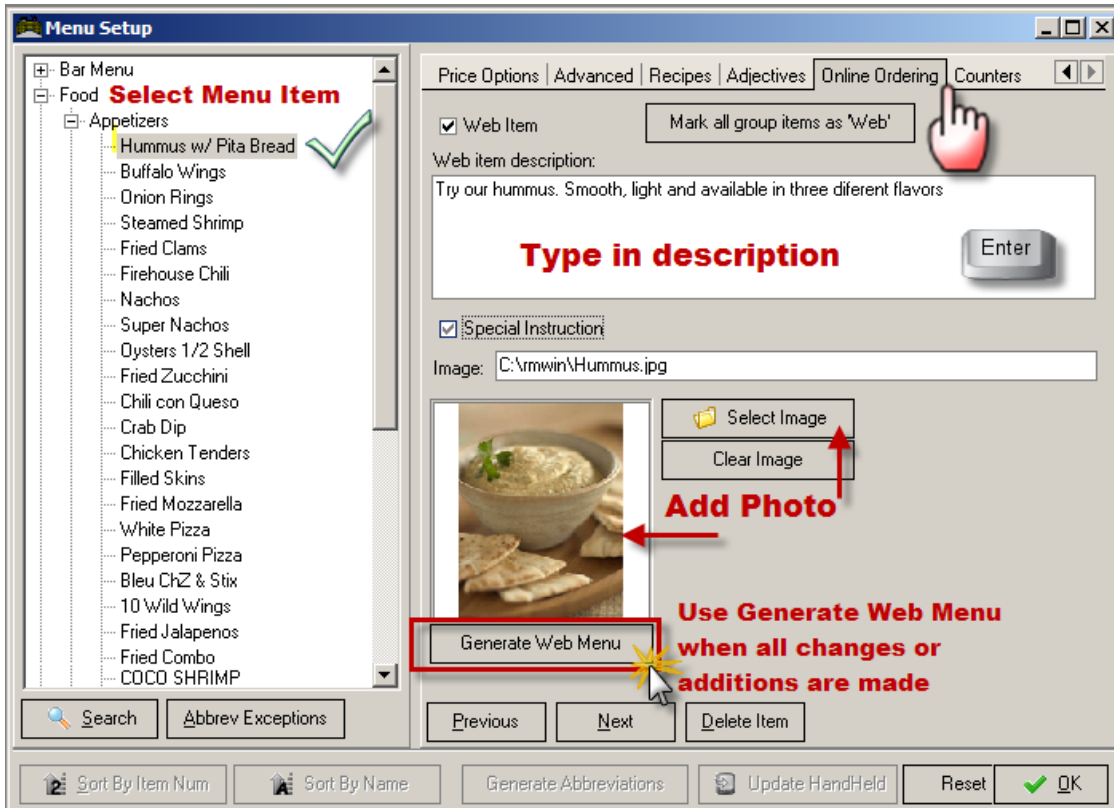
Certain settings in the RM BackOffice Module must be set so that RMWIN can properly communicate with the On Line Ordering portal.

### Photos & Menu Items to Display Online (From RM Back Office)

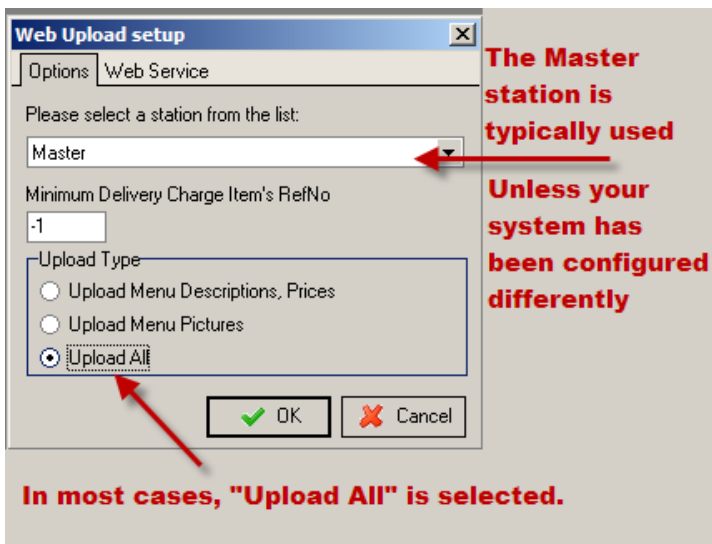
Adding and modifying web menu items is a similar process to the POS. In fact, if you are already a RMPOS user there will be very little you will have to do when adding On Line Ordering to your system. Typically, all you will have to do is make some data additions under the Online Ordering tab of the Menu Setup Form for any menu items offered online. Use the following steps in the Menu Setup Form in Restaurant Manager BackOffice Module to add or modify existing menu items for online ordering offerings:

1. Select the item from the menu tree.
2. Select the "Online Ordering" tab for the item.
3. Check the "Web Item" box.
4. Enter a long text description of the item. This is what the on line customers will see. Make this description "Sizzle". You are selling your item here.
5. Enable the Special Instruction setting if you allow customers to enter special requests for menu items. Leave the setting blank if you do not want customers to place special requests outside standard modifiers.
6. Include a good photo. Pictures sell! If available, enter a photo of the item (preferred size is 300 x 300 pixels at 72dpi) Photos can be re-sized using numerous different shareware or freeware services such as [www.webresizer.com](http://www.webresizer.com), just do a Goggle-search. If the photos are bigger than 80K, you will be presented with a "warning window" and an ID of each photo that is larger. The photos will still upload, but may take longer to appear when the customer goes

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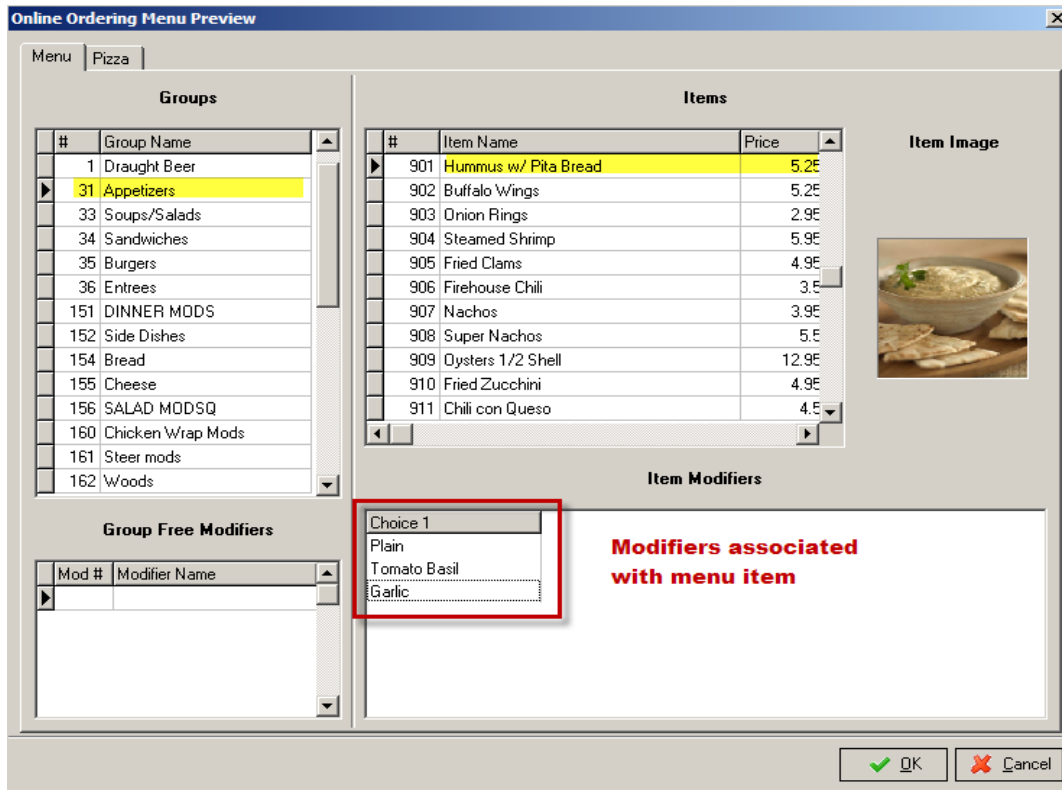
7. Once all the items are selected, click on the “Generate Web Menu” button. A screen similar to below will pop up. Make your selections, and press OK.



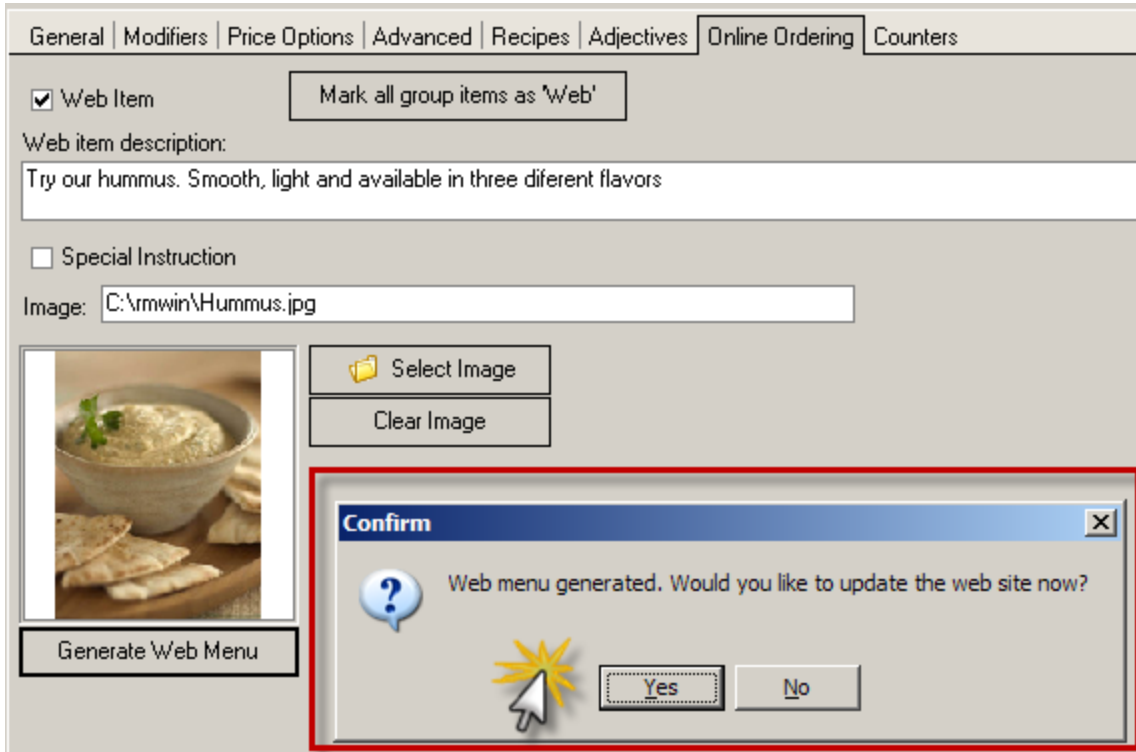
8. Click OK



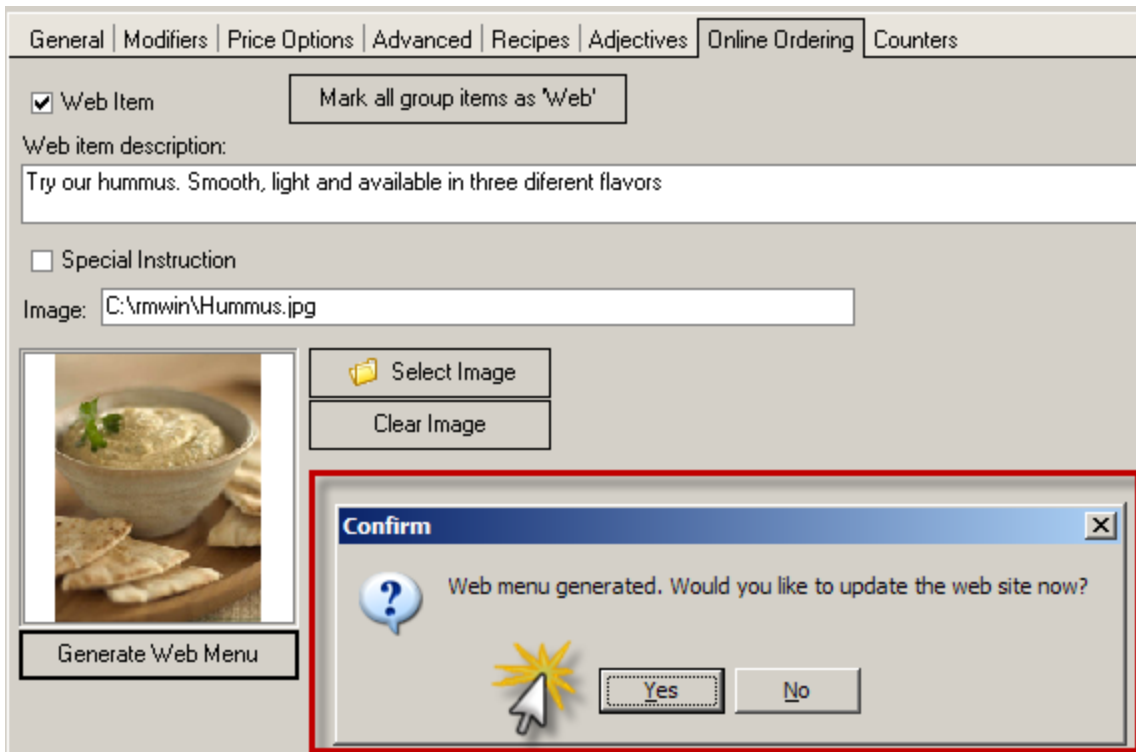
- After several seconds you will get a preview screen similar to the one below. Use this screen to verify that all the items you wish to sell online are present. Note that you can even check the modifiers for each item in the Item Modifiers pane by clicking/scrolling through the items in the Items pane. If everything is correct, click on the OK button in the Preview screen to finalize the upload process.



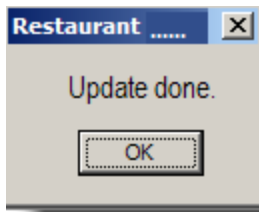
- Click on the "Yes" button to start the update process. Depending on the size of the menu/pictures, this might take a couple of minutes to complete.



11. A progress bar will appear (pictured below), as the menu and pictures (if selected) begin to upload menu items will be the first to upload, followed by menu pictures.



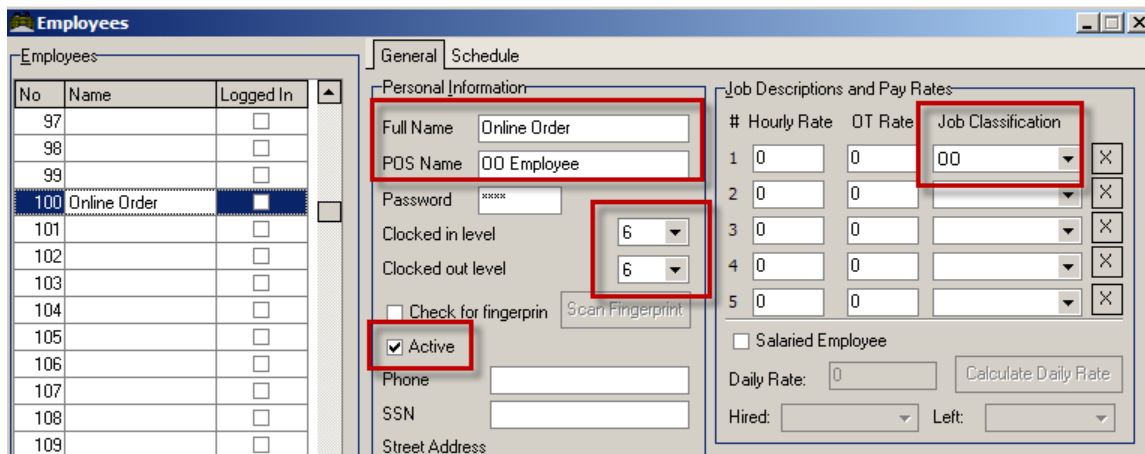
12. When finished, click OK. The RM database is now available on line.



### On Line Ordering Employee Set-Up

OO Coupons (Dollar Discounts) must be uploaded to the Admin UI similar to other menu items available to web ordering. However, this should not be done until the Coupon Settings form in the Admin UI has been completed. Additional setup must be done starting on the Admin UI page only after you have set up the OO Dollar Discounts. More on this is covered in the section: [Coupons](#)

In order for On Line Ordering (Integrated) to accept orders, the session must be open, and the designated On Line Ordering employee must be logged in. NOTE: If your restaurant is set up to automatically close the session, and log out employees at a certain time after close, it will result in "shutting down" the On Line Ordering option, until the designated on line employee is logged back in. One option is to switch the restaurant to ["24 hour mode"](#) but the ramification of should be carefully considered as it may affect regular restaurant operations. Regardless, you must have an employee setup specifically for On Line Ordering. Employee Set Up is preformed in the RM BackOffice Module > Setup > Labor > Employees> Employee Setup Form, Make sure the security level for the "On Line" employee is set to a level to that allows sending and printing items.




You may also want to set up a JOB CLASSIFICATION, just for the online ordering employee, for more detailed reporting or other. If so, In the RM BackOffice Module go to SETUP > LABOR/JOB CLASSIFICATION and make your selections. You will want to minimize the use of prompts and make sure the job class can create a new transaction and allow transfers.

## OO Reminder

On Line Orders will not be process if a designated [OO Employee](#) is not logged in. To aid in this process, ASI created an executable named OOReminder.exe to warn when an OO Employee is not logged. The OOReminder.exe can be run from any computer on the network including a POS station. The program can also run from more than one computer if needed. It is suggested that the executable be placed on a computer used on a regular basis.

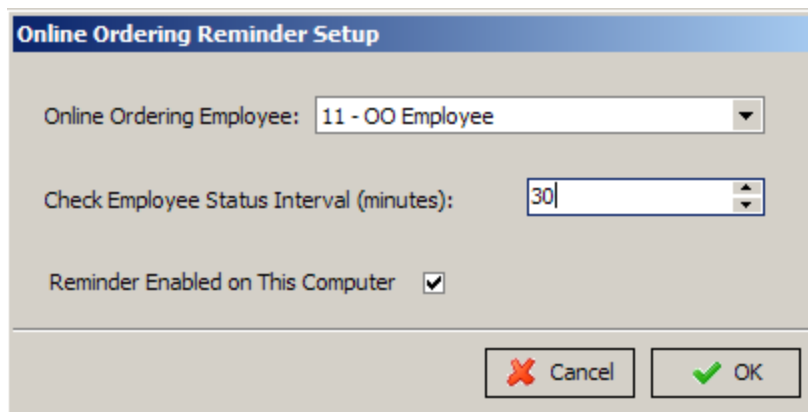
### OO Reminder Setup

Some minor setup is required to run OOReminder. You will need to access OOReminder program from the computer you will be utilizing the application. You can access the program by performing a right click on the OOReminder icon  in the systray and choose the Setup option. In the OO Reminder Setup form fill in the following data fields:

**Online Ordering Employee-** Select the designated OO Employee from the Employee list using the drop down menu

**Check Employee Status Interval-** This field is measured in minutes. RM will scan the logging status of the employee selected in the increment selected. Select a value you are comfortable with.

**Reminder Enabled on This Computer-** Place a check mark in the field if this is the computer you will be using. You can run this executable on more than one computer at a time and will have to be enabled on each Click the OK button once the fields have been completed. OOReminder will return to the systray.



Online Ordering Reminder Setup

Online Ordering Employee: 11 - OO Employee

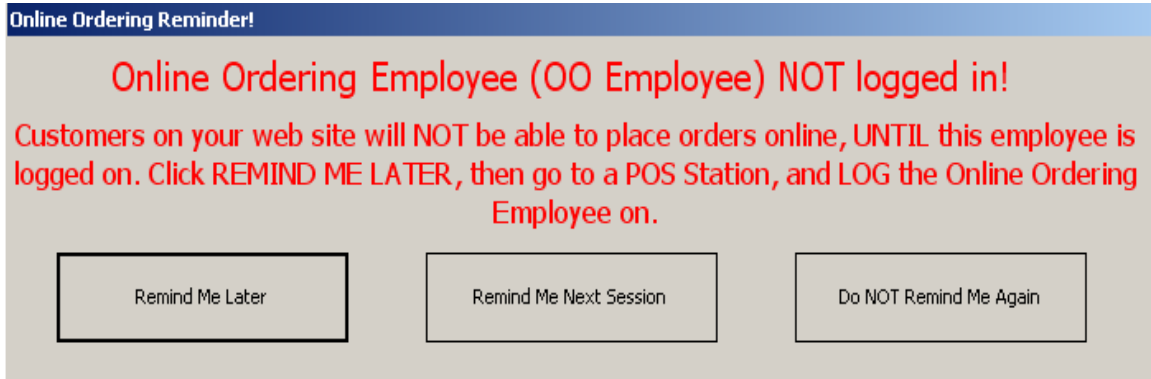
Check Employee Status Interval (minutes): 30

Reminder Enabled on This Computer

Cancel OK

### OO Reminder Operation

The message you received when the designated Online Order Employee will be similar to the illustration below:



You must choose one of the message options listed. At this point you have the option to log in the designated OO Employee. The options presented at the bottom of the screen will perform the following operations:

**Remind Me Later**- will suspend the message until the next interval time

**Remind Me Next Session**- will suspend message until next open session. This message will only appear again if the session is opened and the OO Employee is not logged in.

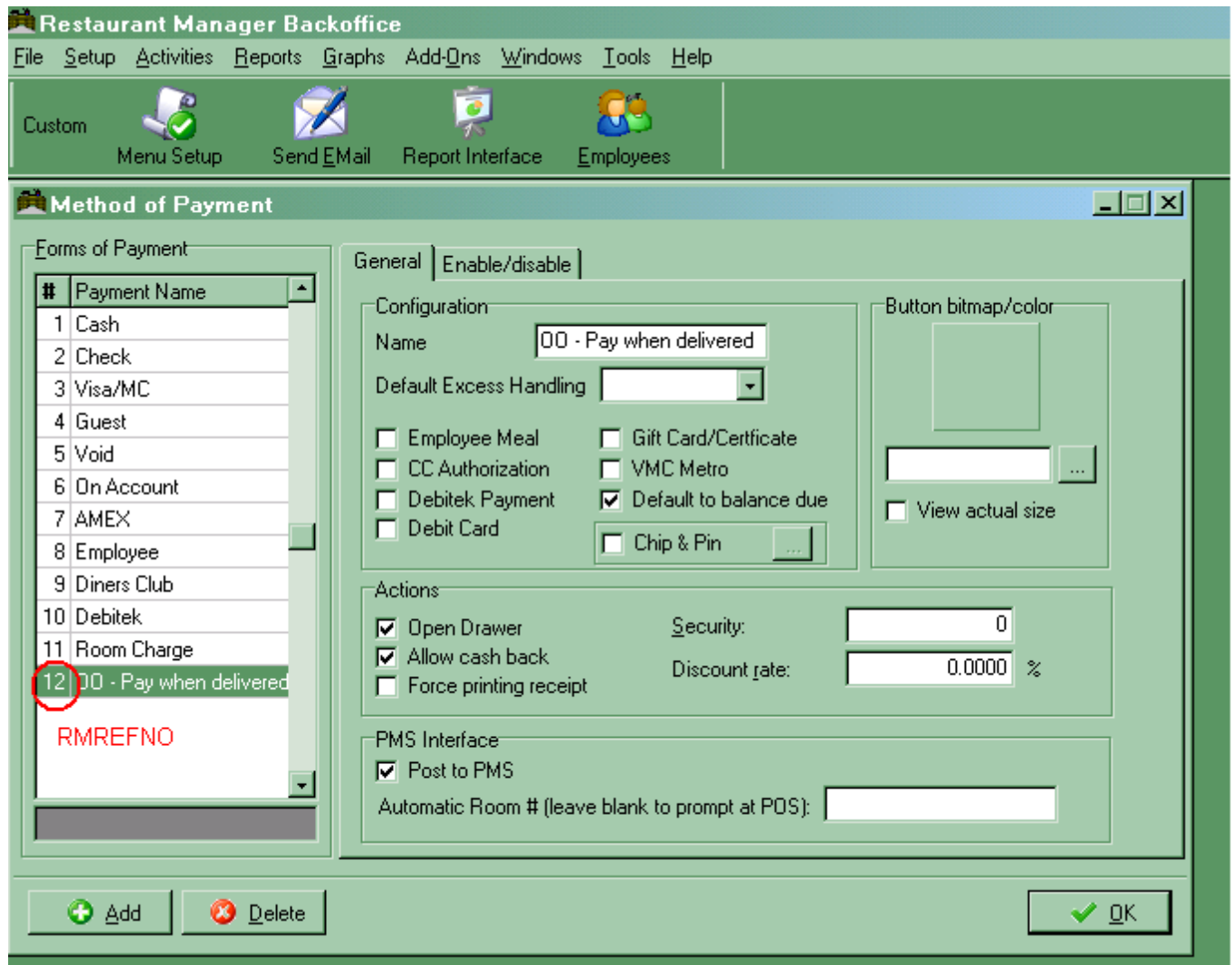
**Do NOT Remind Me Again**- will suspend message until next open session. This message will only appear again if the session is opened and the OO Employee is not logged in.

### Revenue Centers

For each TYPE of On Line Ordering you have (Carry-out, Delivery, Dine-In) you should have a corresponding revenue center set up in RM Back Office. Make sure to properly configure the revenue center so that items print in the proper location, and that orders that go to that revenue center follow the conventions used for that type of order. (carry outs print/don't print, etc.)

### Method of Payment From RM Back Office

In the RM BackOffice Module, you must also set up a new method of payment, and probably call it "On Line Orders" or something similar. The reference number (or payment number) you create in RM BackOffice is the RMREFNO that you will enter in the Online Ordering general setup/payments. You may choose to have only one method of payment in setup in the RM Back Office Module linked to all of the On Line Ordering payments, or, you may set up a separate method of payment in the RM BackOffice for **each** of the corresponding On Line Ordering payments.



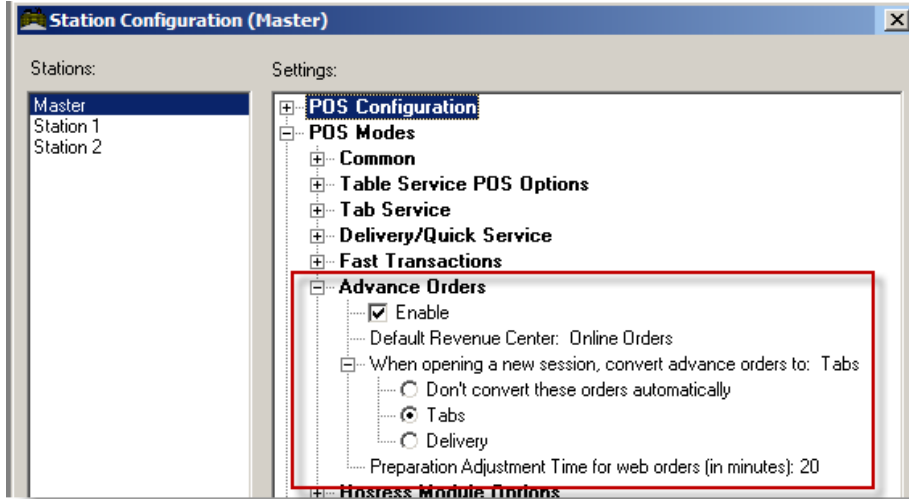
If the restaurant takes credit card and allows for “payment upon pickup” on line, it is suggested that you have two separate methods of payments set up in RM BackOffice for each.

### Advance ordering module

The Advanced Ordering Module must be enabled under the Advance Orders (POS Modes) section in the RM BackOffice Station Configuration for all stations (including Master Station) where you want orders to appear. The Advanced Ordering Module is included when you purchase On Line Ordering module.

Advance orders can be automatically converted to Tabs or Delivery orders on the date they are active. The conversion occurs when opening the session. If you do want advance orders to convert automatically at Session Open, you must choose either Tabs or Delivery under the Advance Orders (POS Modes) section in the RM BackOffice Station Configuration. You will need either the Tab or Delivery Module enabled in the Station Configuration for orders to process correctly. If you do not want orders to convert automatically, select the option "Don't convert these orders automatically"

under the Advance Orders (POS Modes) section in the RM BackOffice Station Configuration. Orders will remain in the Advance Ordering screen and must be converted manually if you want to process the order early. If left untouched, they will convert at the appointed time. Default value: Don't convert these orders automatically



Restaurant Manager can be configured using Station Configuration settings to affect the way on line orders are processed at Session Open. Let's look at a few example when we configure the system with the following settings and use the Tabs Module:

1. Session is opened at 5 am everyday
2. At Session Open, convert to Tabs is set in Station Configuration.
3. Preparation Adjustment Time for web order is set for 20 minutes in Station Configuration.

**Example #1-** Here's what happens at 9 AM, customer does IMMEDIATE ORDER

- **On the Web page**, OO advises customer that order cannot be ready until 9:20 AM

At POS:

- order converts to tab immediately
- order is printed immediately

**Example #2 -** Here's what happens at 9 am, Customer enters LATER TODAY for 5 PM when ordering on line:

- order converts to tab at 4:40 PM
- order is printed at 4:40 PM

**Example #3-** Here's what happens at 9 AM when a customer does FUTURE ORDER for 12 noon tomorrow when ordering on line:

- order converts to tab at 5 AM
- order is printed at 5 AM

**Example # 4-** If Session Open is set to “DON'T CONVERT” in Station Configuration, the only difference is in example #3. Here's what happens:

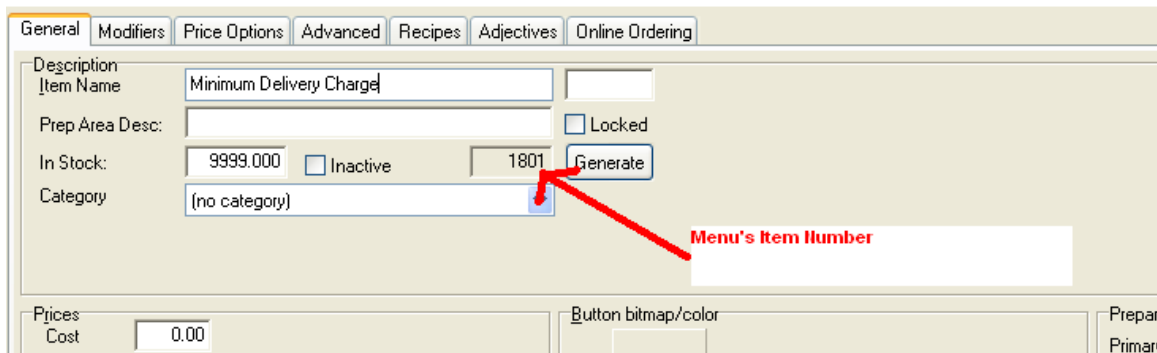
- order converts to tab at 11:40 AM the next day
- order is printed at 11:40 AM the next day

### Tabs or Delivery Module

Either the Tabs or delivery Module MUST be enabled.

### Delivery Minimum Order

From the menu Setup Screen, go to any menu item in the food area, and create a new menu item called Minimum Delivery Charge. **Do not set this as a web item.** You may or may not set this as DISCOUNTABLE. Make a note of this menu item’s PLU number.



### Fixed Delivery Fee

You may or may not want to set a FIXED DELIVERY FEE. The fee is set-up as a gratuity in both Station Configuration and the default revenue center. You may also set up the delivery charge as a menu item. Please consult the RM Manual section [Delivery Charge as a Menu Item](#) for specific instructions. Note that there's a difference between how the delivery charge will be displayed on the Guest Receipt vs. the Confirmation Email that the customer receives. The guest check will have the delivery charge displayed as a menu item while the confirmation email will display it as delivery charge.

### Customer Receipt

Discuss with the owner what message they want to have print at the bottom of ALL customer receipts, but especially Dine-In guest checks. Many locations will use this receipt as a “form” to collect email addresses, by printing a message something like this. “Next Time You Need to Order for Carry-Out or Delivery, Go To [www.FifersSeafood.com](http://www.FifersSeafood.com) And You Can SAVE 10% By Ordering On Line”

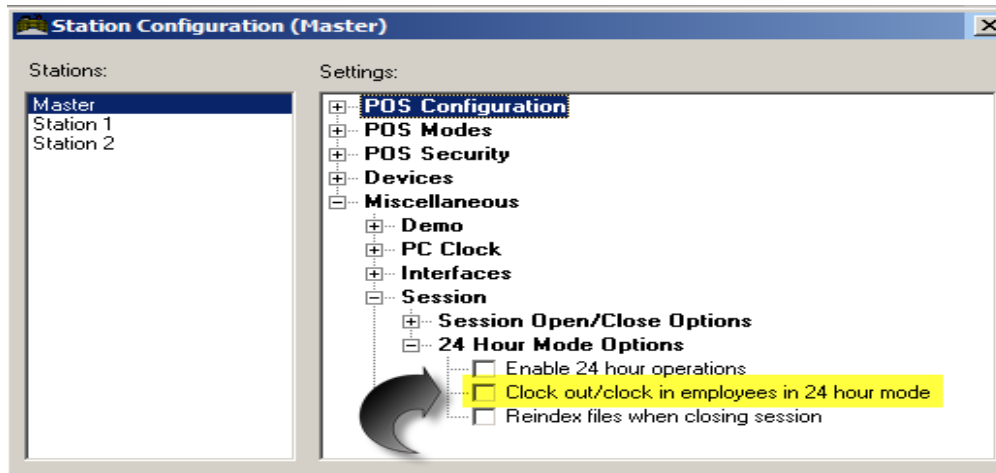


“Print your email address below, and drop it off at the cashier for a chance to win a meal for two....”

## 24 Hour Mode Operation

It is advised that all sites linking to ASI’s On Line Ordering system “turn on” the 24 hour mode in RMWIN RM Back Office. (Station Configuration) Problems can occur if the 24 hour mode is NOT enabled, and an order is placed online for “immediate pick-up”, but the session is closed.

Be sure to check other settings that may be affected by enabling the 24 hour mode.



## Discounts for On Line Use

Offering a discount for customers to use On Line Ordering helps incent the customer to do so, and takes some of the pressure “off” the restaurant’s phone lines.

Version 17 On Line Ordering allows your restaurant the choice of choosing between two discount methods. One discount method is to incorporate a [percentage discount](#). This method will take a pre-determined percentage off all items on the guest check. The second method is to take a [fixed dollar amount](#) off the check. Note that only one discount can be in use at any time with On Line Ordering.

### Percent Discounts For On Line Ordering to Use

Standard percentage discounts may be defined on the Discounts Setup Form in the RM BackOffice to apply discounts to individual items or to an entire check. Most restaurants offer discounts on all items on the entire check for ON Line Ordering. The percentage amount of any standard discount for On Line Orders must be a “fixed” discount. Restaurant Manager does allow you to exclude certain categories of menu items from specific discounts. For instance, a restaurant that offers an ON Line Discount might not apply this discount to items with a Group Type of “Liquor”. Individual Menu Items may also be configured as “Non-discountable”. Once a discount has been created, you can proceed to the Restaurant UI page to enable and [select the discount for use](#).

Use the Discounts Setup Form to create an unlimited number of pre-defined percentage discounts:



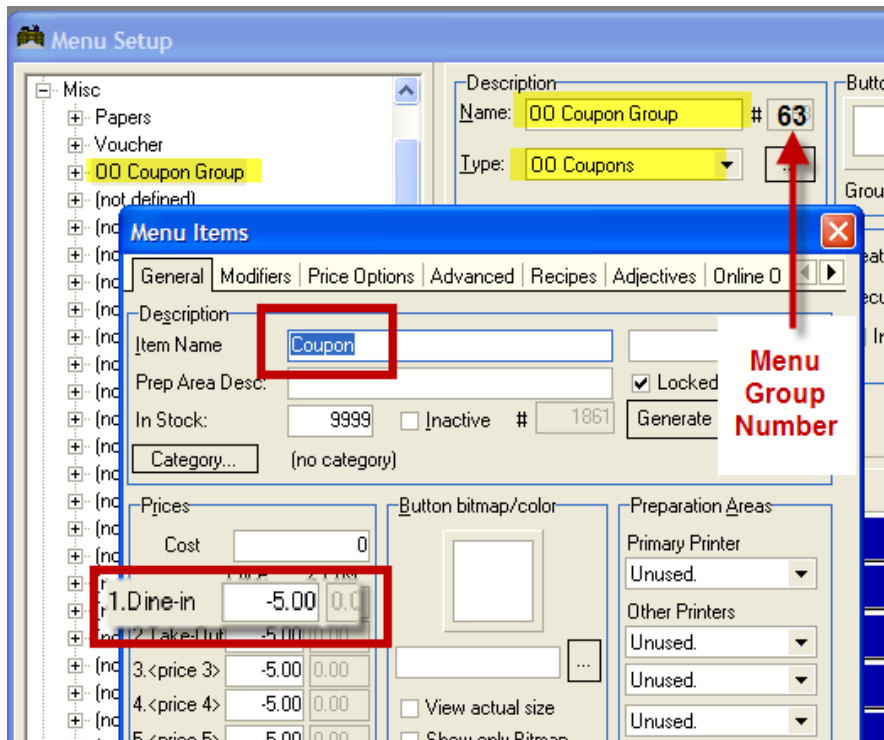
Use the **[Add]** button at the base of the form to add blank fields for configuring new discounts. Then use the following fields to configure the new discount:

- **Discount Name**- Use this field to type in the name of the discount (i.e. "OnLine Order")
- **Percent**- Use this field to define the percentage amount of the discount.
- **Security Level**- Make sure this field is marked as "Zero"
- **Fixed**- This field must be marked with an "X" or enabled.
- **Group Type**- This column lists all the categories of menu items defined on the Group Types Setup Form.
- **Apply Discount**- Click on the field beside each Group Type to indicate whether the discount you are defining should or should not be applied to those items categorized as belonging to a particular Menu Group Type. (Use your mouse to toggle between "Yes" and "No").

#### Dollar Discounts For On Line Ordering to Use

Dollar Discounts (Coupons) are created and defined in the Menu Setup form in the RM BackOffice module. You will need to follow the standard menu setup procedures described in the Restaurant Manager Manual. Below is a brief description of the process:

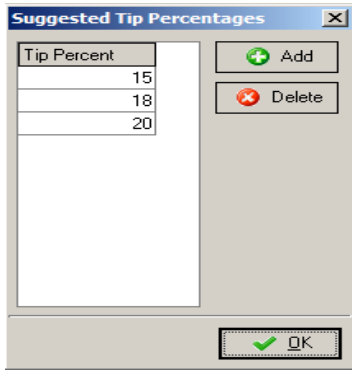
1. **In the Group Type Setup Form-** create and name a new Group Type appropriate for your establishment (i.e. OO Coupons). Make sure taxes are applied in accordance with local laws.
2. **In Menu Setup Form-** create and name a new menu group suitable for your store (i.e. OO Coupon Group). Make a note of the menu group number being used: you will need this number later on when configuring coupons on the Admin UI page.



3. **Under the new menu group-** create and name coupons fitting for your purposes. Here you will define the description and values of each item (i.e., Coupon). The coupon dollar value is entered as a negative price and should be in PRICE #1. Under the Online Ordering Tab of the menu item, make sure the "Web Item" checkbox is enabled on each item.
4. Additional setup will need to be done in the [OO Admin Coupon Setup Form](#)

### Tip Percentages:

You can configure your On Line order system to show "Suggested Tip Percentages" show up in the payment screen. If you wish to implement this function, you must configure the percentages in the RM BackOffice Module > Setup > Settlement and Tips > Suggested Tip Percentages.



(continued in Payments)

# ADDING ONLINE ORDERING TO THE RESTAURANT'S WEB SITE

To connect to the online ordering portal from the restaurant's web site, embed the following link in the web site:

[https://webordering.rmwservices.com/restaurants.aspx?wci=\\*\\*ChainWebId\\*\\*](https://webordering.rmwservices.com/restaurants.aspx?wci=**ChainWebId**)

Where **\*\*ChainWebId\*\*** is the name ASI assigned the restaurant chain. This can be in the [ADMIN pages](#), found under [CHAIN SETUP](#). It is called WEB ID on the [ADMIN pages](#). See below:

**restaurant manager**  
An ASI Technology

Online Ordering Service Fifer's Seafood, Inc.  
[Home](#) [Log Out](#)

### Edit Chain Info

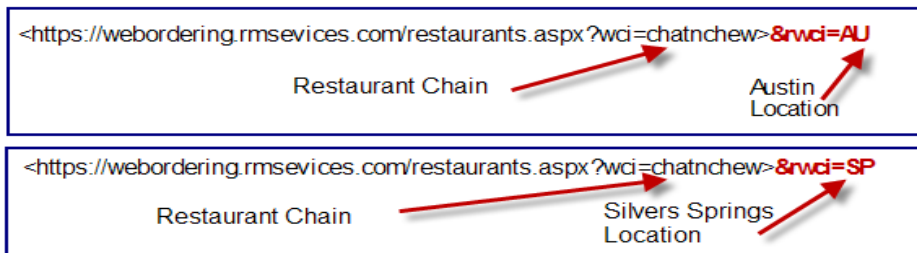
Chain ID	<b>64</b>	Single Menu	<input checked="" type="checkbox"/>
Chain Name	<input type="text" value="Fifer's Seafood, Inc."/>	Logo	<input type="text"/> <input type="button" value="Browse..."/>
Web Id	<input type="text" value="FifersSeafood"/>	Country	<input type="text" value="United States"/>
State	<input type="text" value="Maryland"/>	City	<input type="text" value="Pasadena"/>
Phone Number	<input type="text" value="410-360-2826"/>	Address 1	<input type="text" value="8894 Ft. Smallwood Drive"/>
E-Mail	<input type="text" value="fifersseafood@verizon.net"/>	Address 2	<input type="text" value="ELIZABETH STATION"/>
Allow Phone Login	<input type="checkbox"/>	Zip Code	<input type="text" value="21122"/>
Main Color	<input type="text" value="#B0B0B0"/>	Login Timeout	<input type="text" value="30"/>
Home Page Url	<input type="text" value="http://www.fifersseafood.com/"/>	PH. Format	<input type="text" value="999-999-9999-000"/>
Reseller EMail	<input type="text" value="dan@techmarkinc.com"/>		
Privacy Policy	<input type="text" value="Privacy Policy&lt;br/&gt;Safeguarding your privacy and the security of your personal information is important to us. Please take a few minutes to read the following policy so that you understand how we treat your personal information. As we continuously improve and expand our services, this policy might change. So"/>		
Return Policy	<input type="text" value="Guarantee&lt;br/&gt;Fifer's Seafood operates seven days a week during our normal business hours. It is our commitment to provide your fresh made meal as you ordered it within the time frame that will satisfy your needs and desires. We will use only the finest ingredients and safe cooking methods to"/>		
Terms & Conditions	<input type="text" value="Fifer's Seafood Restaurants is committed to supplying products and services which meet the needs of our customers. As such we are committed to preparing your meal with the freshest ingredients and best cooking methods. If however we fall short of these goals please contact us. If you have any concerns, questions or comments please call 410-360-2628 or e-mail us"/>		

Make sure to use the alpha-numeric "Web I", **not** the numeric "Chain ID".

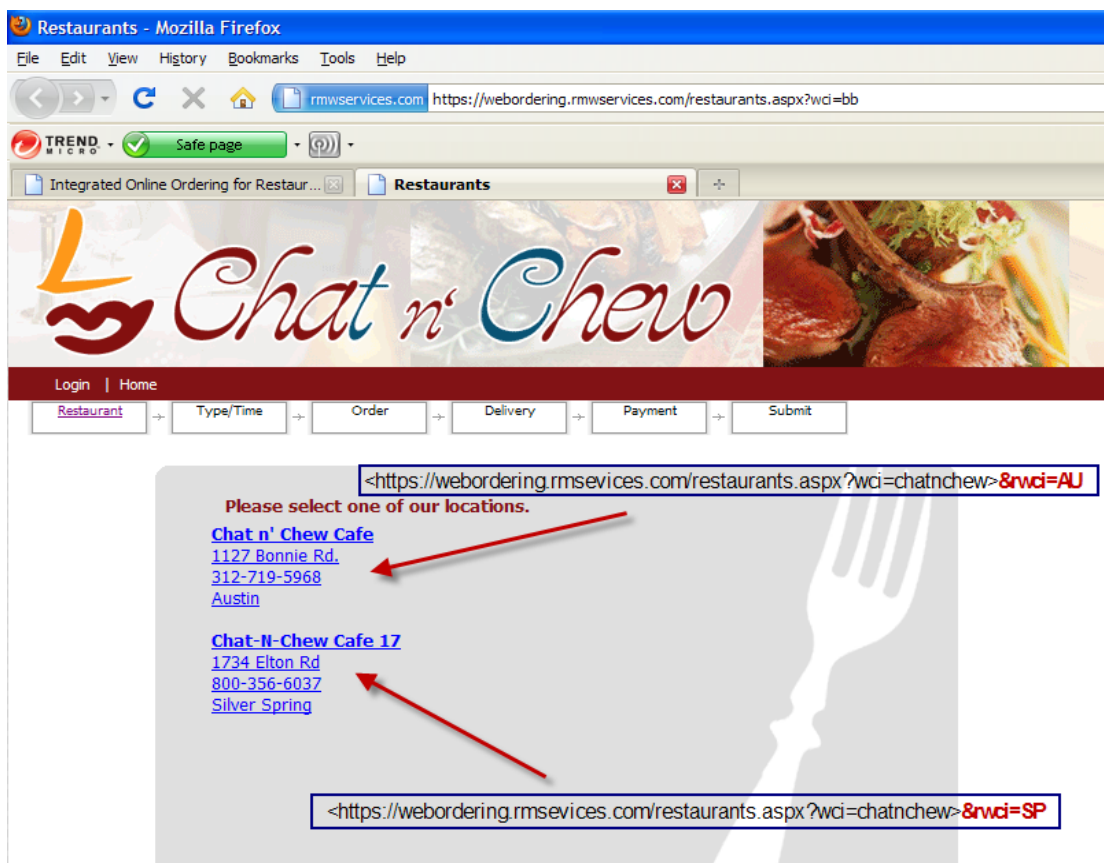
## DIRECTING CUSTOMERS TO MULTIPLE LOCATIONS

Restaurant Manager On Line Ordering allows the customer to access several restaurant locations within the same chain. The customer will access a common URL or web page where a list of each location will be accessible. The webmaster will have to setup the links on the common web page using the ending suffix to the URL will need to be: **&rwci=<restaurant ID>**

The complete sting would look like this for two different locations:



The Common web page would look something like this:



# INSTALLATION- AT THE RESTAURANT

This section details the setup needed for the store computer to communicate with the Web OO Portal. Communications between all computers is essential. The sections under this topic cover:

- [Software and running executables](#) needed at the restaurant site
- [Configuration of the Web Upload form](#)
- [Connectivity Parameters & Testing](#)
- [Connectivity Troubleshooting](#)

## AT THE RESTAURANT'S RM PC/SERVER

Make sure the following has been installed on the server computer (RMServer).

- Download and Install the correct Restaurant Manager 17.xx, or from the ASI reseller pages
- Download and Install the correct Write-On Hand Held application from the ASI reseller pages
- Verify that you have remote access via PCAnywhere, Logmein, or so other program.
- Note the fixed IP address of the RM PC/Server (the public IP address)- this will be used in the OO Admin > Ordering Routing Mode Setup
- Install [OOReminder](#).exe (located in rmwin directory) in RMStartsetup to load with RMStart.
- Install RMWSERVICES.exe (located in rmwin directory) in RMStartsetup to load with RMStart.
- Install POSLINK.exe (located in rmwin directory) in RMStartsetup to load with RMStart

Communication between the Online Ordering Server and Restaurant Manager POS occurs via RMWSERVICES, and POSLINK. . RMWSERVICES facilitates communicating orders from the online site to the restaurant.

## WEB UPLOAD SET-UP

The following are the procedures to setup the Web Load function used to upload menu and configuration changes and additions to the OO Admin Portal. The Web Load Setup Form is accessed in the RM BackOffice Menu Setup Form by selecting a menu item > Online Ordering Tab >Generate Web Menu > Web Service tab. Fill in each field described below:

The screenshot shows the POS software interface with a 'Web Upload setup' dialog box open. The dialog box has a 'Web Service' tab selected. The URL field contains 'http://webordering.rmwservices.com/v17.0.DbGate'. Other fields include 'Chain Connection ID' (Issued by ASI), 'Restaurant Connection ID' (Issued by ASI), 'Admin Username' (xxxxAdmin), and 'Admin Password' (xxxx). There is a 'Test Connection' button and 'OK'/'Cancel' buttons at the bottom. A red box with the text 'OO for v.17' is overlaid on the top right. A blue box contains the URL 'http://webordering.rmwservices.com/v17.0.DbGate/FileOp.aspx'. A black arrow points from this URL to the 'Web Service' tab in the dialog box. Below the dialog box, a text box says: 'After clicking "Generate Web Menu" You will be presented with the WEB UPLOAD SET UP. Enter the appropriate settings.'

**Chain Connection ID** = Chain Web ID provided by ASI (*not* the numeric Chain ID.) The Web ID can be retrieved from the [Edit Chain Info](#) form on the [Admin pages](#). (see screen shots below).

The screenshot shows the 'Edit Chain Info' form. At the top, it says 'Do not use this number' next to the 'Chain ID' field which contains '170'. The 'Chain Name' is 'Chat and Chew'. The 'Web Id' field is highlighted with a red box and contains 'Chatnchew'. A green checkmark is next to the 'Web Id' field with the text 'Provided by ASI'. Other fields include 'Country' (United States), 'State' (Maryland), 'City' (Silver Springs), 'Address 1' (1234 Main Street), 'Phone Number' (555-555-5555), 'E-Mail' (chatnchew.com), 'Order Time Inc' (30), 'Login Timeout' (30), and 'Home Page Url' (http://www.chatnchew.com).

**Restaurant Connection ID** = Restaurant Web ID, *not* the numeric Restaurant ID. (If you have forgotten it can be found under the Restaurant Setup from the [General Settings Form](#) under the Admin pages, below.)



General Settings		Restaurant Web ID	
Restaurant ID	190	Restaurant Web Id	aa
Name	United States: OnLine Ordering v.1	City	Washington, DC
Admin Email	pilcher@actionssystem.com	Phone Number	SAMPLE !
Street Address	1600 Pennsylvania Blvd	Menu	Chat-N-Chew Cafe's menu
Time Zone	(GMT-05:00)	Delivery Charge	3.00
Prep. Time(min.)	30		

**Admin Username:** Administrator name provided by ASI

**Admin Password:** Administrator password provided by ASI

### CONNECTIVITY TEST (LOCAL SITE “SEES” OO HOST AT ASI)

Click on the [Test Connection] button. This should result with a “SUCCESS” to ensure a successful RMWIN menu upload. This means that the RM PC/Server can “see” or connect to the Online Ordering portal that you created earlier. For any error, consult the ASI Knowledge base.

### RM PC/SERVER CONNECTIVITY TEST (OO HOST AT ASI “SEES” LOCAL SITE)

For Online Ordering to work the restaurant server must be accessible from the outside world. If you are using a firewall you will have to modify the NAT to associate the fixed IP to the server’s local IP. To test connectivity to the restaurant, login to the OO Admin pages:

- Click RESTAURANTS
- Click SELECT next to the restaurant’s name
- Scroll down to the ORDER ROUTING MODE section
- Click SELECT next to the RM ADVANCE ORDER
- Click on the [TEST] button.

If it is setup correctly, you’ll see Url used:

<http://xxx.xxx.xxx.xxx/soap/IEmployeeOps> Where “xxx.xxx.xxx.xxx” is the RM Servers Public IP address.

## Order Routing Mode Settings for RM Advance Order

Enabled	<input checked="" type="checkbox"/>
RM Server's IP Address	207.188.233.105:9644
Emp No	25
Emp Password	••••
Delivery Revenue Center #	8
Delivery POS Sale Type	Delivery (4) ▼
Carry Out Revenue Center #	7
Carry Out POS Sale Type	Tabs (2) ▼
Dine In Revenue Center #	1
Dine In POS Sale Type	Tabs (2) ▼
pre-April 2007 compatibility mode	<input type="checkbox"/>
Primary	<input type="checkbox"/>
Only if primary failed	<input type="checkbox"/>

Url used: <http://207.188.233.105:9644/soap/IEmployeeOps>  
 TEST RESULT - Server Error:Employee is not clocked in. Please clock in at a full service station.

**TEST RESULT – “SUCCESS”** this means that the Online Order portal can “see” the restaurant’s RM PC/Server. (In the image above the test is a “SUCCESS” but orders will NOT be taken because the online employee is NOT logged in.....)

Not working? See the [Troubleshooting Section](#)

## CONNECTIVITY SETTINGS FOR WINDOWS XP

### PC/SERVER SOFTWARE INSTALLATION PROCEDURES

IIS is no longer required to run for Online Ordering to operate OO for v.17. If you need to restart the RMSoapServer, issue the following 2 commands from a CMD prompt:

**NET STOP** RMSoapServer

**NET START** RMSoapServer

To do an RM install, you will have to manually stop the RMSoapServer.

Issue the following command:

**NET STOP** RMSoapServer

After the install, make sure to restart the SOAP Server:

**NET START** RMSoapServer

Since RMServices now runs as a Windows Service, it will automatically start when the server is rebooted.

You should always see the RMSoapServer icon in the system tray when it is running. You cannot exit the RMSoapServer service via the GUI. You must enter the NET STOP command to stop it. Closing the GUI simply minimizes the service to the tray.

If you change the location of RMWIN, you'll need to re-register the RMSoapServer. If you don't uninstall it first, you will get an error message that the service is already installed, so you must first uninstall it. It will uninstall, even if the directory has changed. The following lines will re-install the service in a new directory:

- NET STOP RMSoapServer
- RMServices /uninstall
- RMServices /install
- NET START RMSoapServer

### **STEP 1: SHUT DOWN ALL APPLICATIONS**

**Important:** This step is not required if you are installing the ASI Write-On Handheld demo system.

Shut down all applications on the PC/Server before going to the next step.

In addition to this, if you are installing the ASI Write-On Handheld Server on an existing Restaurant Manager system:

- Shutdown all POS stations and add-on programs such as printer spooling (RMSPOOL.exe) and credit card processing (rmccwin.exe.)
- Perform full backup of RESTAURANT MANAGER working directory.

### **STEP 2: INSTALL/UPGRADE RESTAURANT MANAGER SOFTWARE**

Install the RESTAURANT MANAGER software per the instructions found in the [Restaurant Manager Installation Guide](#). (If you are using an existing RM database, select “upgrade” vs. “full install”.)

- Download and install the **latest RM update** with the v17 packages from the P&U page. Use RM PKG \_\_\_\_\_ & WO PKG \_\_\_\_\_ (Check website CAREFULLY for notes!)
- TABS or DELIVERY, and ADVANCE ORDERING modules installed for RM.

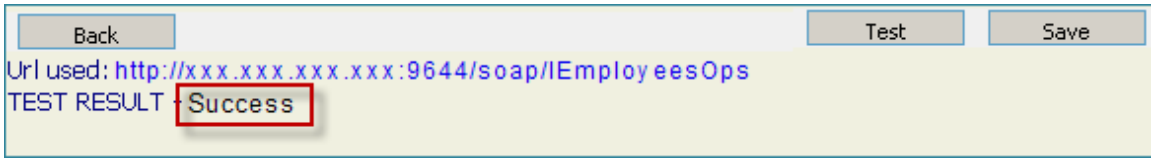
### **DETAILED CONNECTIVITY TEST**

For Online Ordering to work the restaurant server must be accessible from the outside world. If you are using a firewall you will have to modify the [NAT](#) (Network Address Translation) to associate the fixed IP (public IP) to the server's local IP.

Test the connectivity to the restaurant by

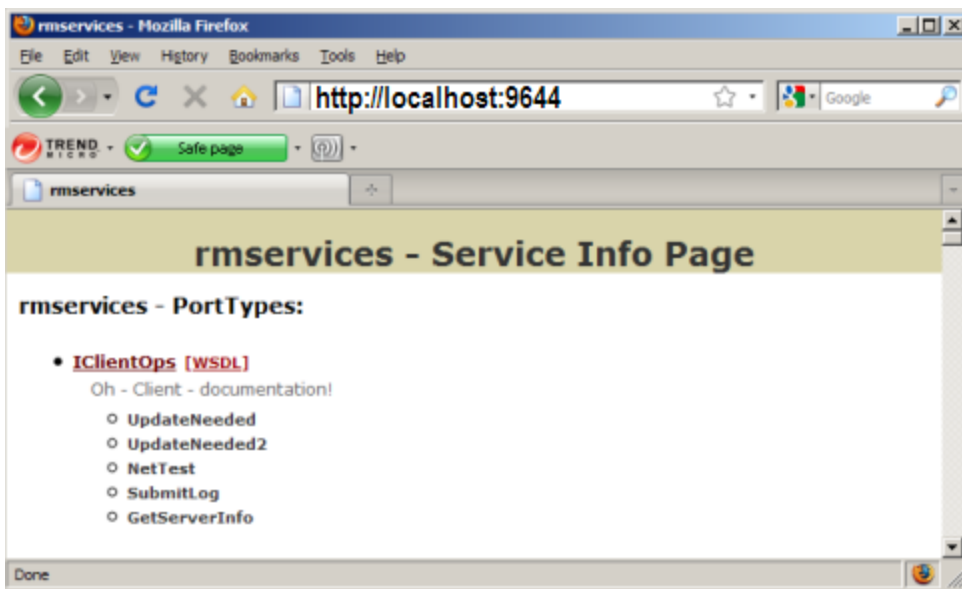
1. Logging into your [dealership's Admin pg](#) and access Restaurants Setup->Order Routing Modes >RM Advance Order.

2. Click on the [TEST] button. If the NAT is setup correctly, you'll see "**TEST RESULT – SUCCESS**".



If this message does not appear, try reinstalling the WOPKG [fullsetup](#) if you're having server side errors (e.g. html, xml errors). After re-installing, test the WOPKG by

- Typing <http://localhost:9644/> in a browser window (I.E. or Firefox) of the PC/Server. The result returned



- [Repeat steps 1 & 2 above](#)- see the section on [Connectivity Troubleshooting](#) if connectivity issues still exist

## CONNECTIVITY TROUBLESHOOTING

The following is a list of potential problems with connectivity and possible solutions. If the below solutions do not work: open a support ticket or email [support@actionssystem.com](mailto:support@actionssystem.com).

### Connectivity Test Fails

The failure of the connectivity test could occur for several reasons. Some of the possible reasons are list below:

- **Invalid IP address**- make sure correct IP address was typed
- **Firewall Issue**- [NAT](#) (Network Address Translation) issue, etc.

- **Port-Forwarding Issue-** Make sure the correct port is being used and that it is associated with the correct PC IP address.
- **Other network issues...**

The following is a list of steps to be taken to determine where the problem lies. The next two sections outline actions to be implemented using both internal and external network testing for when a Connection error occurs.

### Local Network Testing

A “Connection Error” means that the OO server located at ASI offices, cannot “talk” to the restaurant’s PC/Server.

restaurant manager™  
An ASI Technology

Online Ordering Service Mario's @ ASI LAB  
[Home](#) | [Log Out](#)

#### Order Routing Mode Settings for RM Advance Order

Enabled

RM Server's IP Address

Emp No

Emp Password

Delivery Revenue Center #

Delivery POS Sale Type  ▼

Carry Out Revenue Center #

Carry Out POS Sale Type  ▼

Dine In Revenue Center #

Dine In POS Sale Type  ▼

pre-April 2007 compatibility mode

Primary

Only if primary failed

Url used: <http://207.188.233.105:9644/soap/IEmployeeOps>

TEST RESULT - Connection Error: The underlying connection was closed. Unable to connect to the remote server.

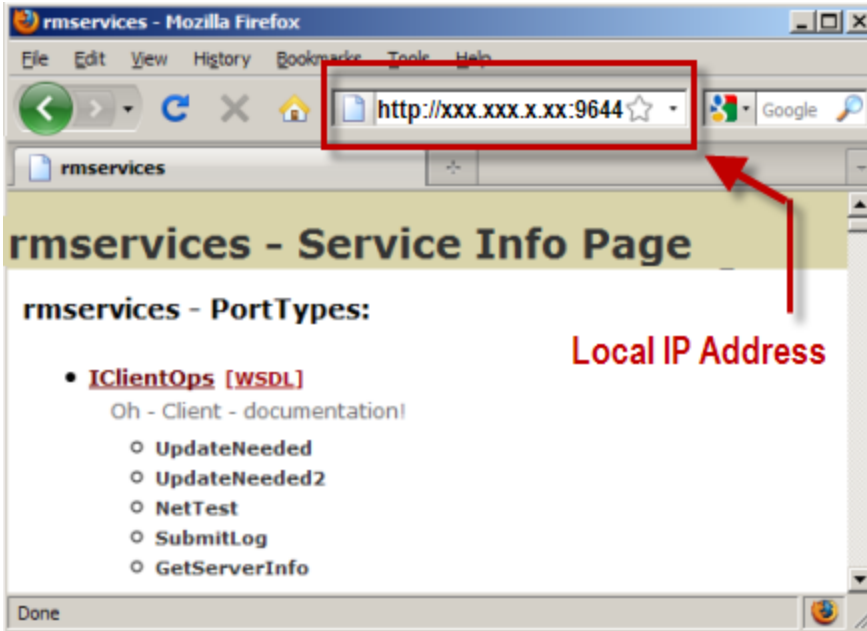
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Means the OO Server cannot "Talk" to the RM Server at the restaurant. Could be many reasons, firewall, router, wrong port, internet down, etc., etc.

If the steps outlined in the [Connectivity Test](#) fails try the following steps when PC/Server returns the correct screen but still can't connect from Web

1. Go to another computer on the same network as the PC/Server, open a browser window, and type : **http:// xxx.xxx.x.xx:9644 – (x = local IP address, 9644= port)**

The result returned should present a web page like show below:



2. If step 1 fails then there may be an issue with:
  - a. The firewall settings- try turning off firewall
  - b. An incorrect IP address- double-check the IP address of the PC/Server

### External Network Testing

If the internal testing succeeds and you still receive a Connection Error, you may have either a firewall or a port-forwarding issue. Our next step is to test connectivity from outside the local network and do the following:

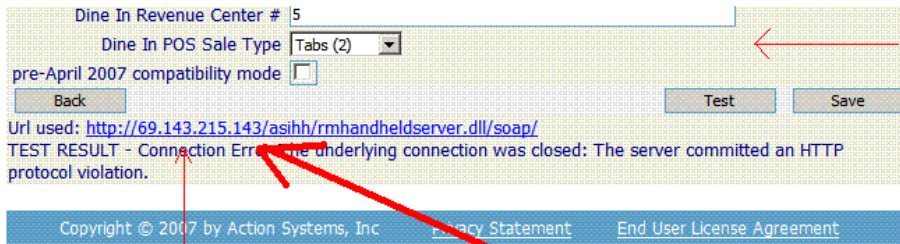
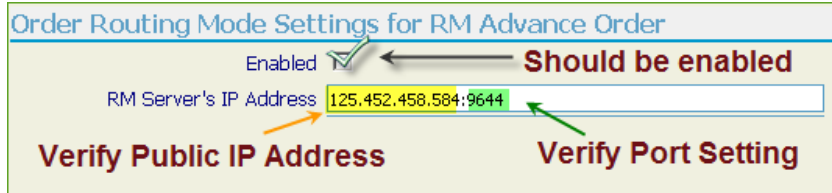
1. Open the software for the router/firewall **& open port 80 to allow 9644 access.**: If you have to use Port Forwarding at the site, you must enter the port you are forwarding to (i.e. 9644).
2. Turn off the firewall on the PC/Server, and try [Connectivity Test](#) again.

### Admin Page Ordering Routing Settings

If internal testing works and the port and firewall settings are confirmed to be correct we can check the setting in the Order Mode Routing for RM Advance Order:

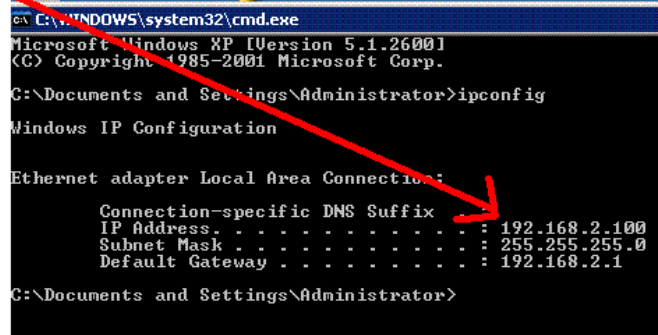
1. Log onto ASI's Admin page
2. Go to Restaurants > Press the [Select](#) option next to restaurants name and:
  - a. Scroll down to Order Mode Routing
  - b. Press the [Select](#) option next to RM Advance Order and press Test. Proceed to step
3. On the RM Advance Order Setting page check the following:

- a. **Public IP address**- Remember that in the ASI OO Admin pages, the IP address that is required is the “Public IP address” of the PC/Server, not the local network IP address.
- b. **Port Setting is correct**- the port setting should match the local computers port forwarding number. Also make sure the colon separates the IP Address and the port number
- c. **RM Advance Order Routing – should be “Enabled”**



From ADMIN pages of restaurant...

This IP Address, 69.143.215.143 is the "public" or "fixed" IP Address of the server. However, it is sitting "behind a firewall or router" and must be "port-forwarded" to the LOCAL IP Address of the RM Server, in this example, 192.168.2.100



ipconfig on RM Server

## Server Error

If you get a “Server Error” message similar to (shown below), the employee is not logged into to the Restaurant Manager POS s/w at the location noted in the IP address on this screen.

restaurant manager™  
An ASI Technology

Online Ordering Service Mario's @ ASI LAB  
Home | Log Out

### Order Routing Mode Settings for RM Advance Order

Enabled

RM Server's IP Address

Emp No

Emp Password

Delivery Revenue Center #

Delivery POS Sale Type

Carry Out Revenue Center #

Carry Out POS Sale Type

Dine In Revenue Center #

Dine In POS Sale Type

pre-April 2007 compatibility mode

Primary

Only if primary failed

Back

Url used: <http://207.188.233.105:9644/soap/IEmployeeOps>  
TEST RESULT - Server Error:Employee is not clocked in. Please clock in at a full service station.

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## System Settings

Verify that the site has the proper Upgrade Code for HH by making sure the HH module exists in Sysview (if the site did not have handhelds before). If not, contact ASI for the proper code.

```

C:\WINDOWS\system32\cmd.exe
Config file.....SYSCNFG.SCR
Serial Number.....010360-0803
Restaurant Name.....'Ferraro's'
# of fixed stations....13
# of Handhelds.....1
Central Mgr locations...0
Security Key type.....9
Table Service POS.....Yes
Tabs POS.....Yes
Quick Service POS.....Yes
Delivery POS.....Yes
Delivery Databases.....Yes
Inventory Version.....0
Guest Accounts.....Yes
Hostess Module.....Yes
Credit Card Auth.....Yes
Debit cards/Chip & Pin..No
Age Verification.....No
PMS Interface.....No
Accounting Interface...No
Scale Interface.....Yes
Club Interface.....No
Monthly pass code.....No
Mapping Interface.....No
Chinese Remote Prt.....No
Coin Dispenser.....Yes
Browser Interface.....No
Employee Scheduling....No
Debitek Interface.....No
Scanner Interface.....Yes
Advance Ordering.....Yes
Customer Loyalty.....Yes
Fingerprint Recog.....Yes
Givex Interface.....No
Real time KDS.....Yes
Video Overlay.....Yes
Caller ID Interface....Yes
Liquor control.....Yes
Quickstaffer Empl's...200
Redundancy limit.....1
Last version update....16.0
Subscription expir.....N/A
E:\rwin>

```

(Above is an image of the SYSVIEW that shows at "least one HH")

## SETTINGS FOR WINDOWS 2003 SERVER

To install Internet Information Services on Windows 2003:



- Click Start->Control panel > Administrative Tools > Manage Your Server.
- Click Add or Remove .
- Click Next.
- Click on "Application Server"
- Click Next.

Then make sure that the DLL files are there also, do this:

Under Windows 2003 Server, it is configured to not allow unknown web server applications. Use the following steps to insure proper setup:

1. Start->Administrative Tools->Internet Services Manager.
2. Click on the computer name.
3. Click on Web Service Extensions
4. Click on All Unknown ISAPI Extensions, and then click Allow.
5. Click on All Unknown CGI Extensions, and then click Allow.

You can also allow specific DLL's to run by using the "Add a new Web Service extension" task listed in that same screen. (i.e. rmhandheldserver.dll)

(continued from Daily Operation Tips)

## PLACING AN ORDER VIA THE INTERNET

The steps to place an online order can occur in any sequence Example: a customer can go directly to the menu to start ordering and then return to change the “Order Information” later. In addition, the customer can always return to login or create an account at anytime during the process. This functionality invites new and existing customers to simply view the menu at their own discretion. The basic outline of placing an online order is as follows:

1. [Adding or accessing customer information](#)
2. [Ordering Menu Items](#)
3. [Removing Items from An Order](#)
4. [Editing Items on a Order](#)
5. [Completing an Order](#)
6. [Order Confirmation](#)

The following sections outline the steps the restaurant’s customers will use to place an online order.

### **NEW CUSTOMER / EXISTING CUSTOMER**

Customers will go to your restaurant’s web site, and when they choose to order a meal on line will be re-directed to your restaurant’s specific Online Ordering portal. If there are multiple restaurants to choose from, after they select the restaurant of their choice, they will be presented with a page similar to below)

This section outlines the steps to navigate to a web site and enter the customer information necessary for placing an online order.

1. Navigate to the appropriate Restaurant WEB site, and click on their “Order On Line” or “Order Now” button or link.

The below is a sample screen of a customer’s web site



Selecting the Order Online option will lead the customer directly a similar Online Ordering Portal pictured below:

Login | Home

[Select Restaurant](#) [Change Type or Time](#) [Select Items](#) [Change Address](#) [Go to Payment Screen](#)

### Your Order Information

**What type of order is this?**

Delivery  
 Pick-Up

**When do you want your order?**

Immediately ▾

**Accepting orders at the moment.**

Order will not be ready for Delivery/ Pick-Up until 8/6/2010 1:05:00 PM

[Start Ordering](#)  
 or  
[Recall Last Order](#)

### Hours and Directions

**Online hours**  
 \* SAVE 10% WHEN YOU ORDER ON LINE ! \*

Carry Out/Pick-Up Hours:  
 MON-THURS: 11:00a - 09:00p  
 FRI-SAT: 11:00a - 10:00p  
 SUN: 11:00a - 09:00p

GO TO OUR MAIN SITE [www.FifersSeafood.com](http://www.FifersSeafood.com) AND SIGN UP FOR OUR EMAIL/VIP CLUB!

[Click here for directions.](#)

### Special Offers

Save 10%! If paid by Credit Card, please have card ready for delivery to verify. If pick-up, please bring the Credit Card with you, for cashless verify. THIS IS FOR YOUR PROTECTION. Thank you.

2. Select the **TYPE OR ORDER:** (Delivery, Carry Out, Dine In) -Restaurant Manager forces the customer to define the order. This is accomplished under the “Your Order Information section of the default web menu page(pictured above).
3. Select **WHEN YOU WANT YOUR ORDER:** (Immediately, Later Today, Future Date)-You can configure your system to enforce a “[web preparation time](#)”. If the customer orders at 1:30 PM, and your restaurant has a “30 minute web-prep time” the message (noted in red print on above image under the “Your Order Information” section) will inform them that the “Order will not be ready for pick-up/delivery until 2:00 PM.”

**Your Order Information**

**What type of order is this?**

Delivery  
 Pick-Up

**When do you want your order?**

Immediately ▾

**Accepting orders at the moment.**

Order will not be ready for Delivery/ Pick-Up until 8/6/2010 1:05:00 PM

**Start Ordering**

or

**Recall Last Order**

4. Click on the Policies link at the bottom of the OO Portal to view the restaurants policies. Read over the policies on the page and click "Back" to return to the main OO Portal. Restaurant Manager allow you to [custom configure your restaurants various policies](#) relating to Information Privacy, Returns, and Agreement terms.

### Privacy Policy

Privacy Policy  
Safeguarding your privacy and the security of your personal information is important to us. Please take a few minutes to read the following policy so that you understand how we treat your personal information. As we continuously improve and expand our services, this policy might change. So please check it out periodically.  
Our server collects certain information from you that we store and maintain. When you set up an account to use with our service you are required to provide us with your full legal name, email address, full street address including city, state and zip code, and telephone number. You must also choose your Username and Password and provide those to

### Return Policy

Guarantee  
Fifer's Seafood operates seven days a week during our normal business hours. It is our commitment to provide your fresh made meal as you ordered it within the time frame that will satisfy your needs and desires. We will use only the finest ingredients and safe cooking methods to provide this service to you.  
However we are only human, and if for any reason we fall short of this goal, please call us at **410-360-2525** or email us at [fifersseafood@verizon.net](mailto:fifersseafood@verizon.net) so we can work with you to make it right. Your satisfaction is our business and your feedback is important to us as well.

### Terms & Conditions

Fifer's Seafood Restaurants is committed to supplying products and services which meet the needs of our customers. As such we are committed to preparing your meal with the freshest ingredients and best cooking methods. If however we fall short of these goals please contact us. If you have any concerns, questions or comments please call **410-360-2525** or e-mail us [fifers@broadstripe.net](mailto:fifers@broadstripe.net)

[Back](#)

5. When you are ready, click **START ORDERING** or **RECALL LAST ORDER** (if existing customer)

[Start Ordering](#)

or

[Recall Last Order](#)

## ORDERING MENU ITEMS

This section details the steps the customer will use to add menu items to the online order:

1. Click on the group or description of food you wish to order, or select ALL, and use the middle scroll bar to scroll up and down.

**Pasadena's Finest Seafood**  
Owned and operated by the 3rd generation of the Fifer Family with over 50 years combined experience.

Navigation: Login | Home  
 Select Restaurant: Fifers Seafood ...  
 Change Type or Time: 5/3/2010 6:21:4...  
 Select Items  
 Change Address  
 Go to Payment Screen  
 Submit

Menu Groups: All, Crabs To Go, Steamed Seafood, **Platters**, Ala Carte Seafood, Sides / Wings, Sandwiches / Wraps, Soups / Salads, Kids Menu, Sodas / Beverages, FRESH CRABMEAT, Seasonal Trays, PARTY TRAYS, Desserts

Menu Items:

- Crab Platter** \$21.99 [Add]
- Fried Clam Platter** \$14.99 [Add]  
A big helping of deep fried clam strips served with cocktail or tartar sauce and choice of (2) sides. Sides: Cole Slaw, Mac Salad, Potato Salad, French Fries, Hush Puppies, Onion Rings, Corn, Green Beans, & Shrimp Mac for an extra buck.
- Shrimp Salad Platter** \$18.00 [Add]  
A generous portion of our "Famous" Shrimp Salad on a bed of lettuce and served with (2) side orders. \* A Pasadena Favorite! Sides: Cole Slaw, Mac Salad, Potato Salad, French Fries, Hush Puppies, Onion Rings, Corn, Green Beans, & Shrimp Mac for an extra buck.

Callouts:

- Use All use the Scroll Bar to view all menu items through all the groups
- Select Menu Group to limit options to a single group and use the Scroll Bar to view items within group
- Use the Add button to select menu item to be added to order

- After selecting the items you wish to order, you may be prompted to enter the quantity, and some special instructions (if applicable). Special instructions are limited to 40 characters.

**Add Item**

Adding **Hush Puppies** to the order ...  
Hush Puppies with onion, Deep fried to perfection.

Enter Quantity  **40 Character Limit**

Special Instructions

[Add to Order] [Cancel]

**GUEST CHECK**

For Delivery - 5/3/2010 6:21 PM [--Modify](#)

QTY	ITEM	PRICE
	Subtotal:	\$0.00

- If the item contains “modifiers”, such as a dressing option to go with a salad, you will be prompted to make your selections.
- Select the desired modifier(s) and complete ordering the item by clicking on the ADD TO ORDER button. It’s that easy!

**Fifer's SEAFOOD, Inc.**  
Pasadena's Finest Seafood  
*Owned and operated by the 3rd generation of the Fifer Family with over 50 years combined experience.*

Login | Home

**Add Item**  
Adding **Deluxe Platter** to the order ...

One lump crab cake, two golden fried shrimp, two fried sea scallops, one piece of battered fish, fried clam strips and a softcrab. Served with your choice of (1) SIDES All food must be fried except Crabcake. Sides: Cole Slaw, Mac Salad, Potato Salad, French Fries, Hush Puppies, Onion Rings, Corn, Green Beans, & Shrimp Mac for an extra \$ buck \$.

Enter Quantity

**Select Modifiers**

**COOK TYPE ?(Choose One)**

Crabcake Broiled (\$0.00)       Crabcake Fried (\$0.00)

**CHOOSE SIDES.....(Choose One)**

Cole Slaw (\$0.00)       Fries (\$0.00)       Potato Salad (\$0.00)  
 Macaroni Salad (\$0.00)       Onion Rings (\$0.00)       Hush Puppies (\$0.00)  
 Corn (\$0.00)       Shrimp Macaroni (\$1.00)       Green Beans (\$0.00)  
 Mash Pot W/Gravy (\$0.00)       Mash Potatoes (\$0.00)       Corn on the Cobb (\$0.00)  
 House Salad (\$0.00)       Caesar Dressing (\$0.00)       none

Special Instructions

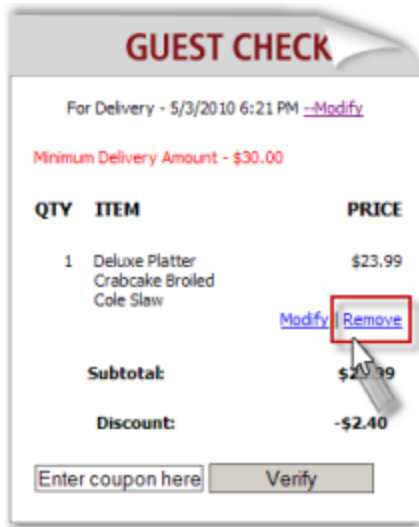
**GUEST CHECK**  
For Delivery - 5/3/2010 6:21 PM [--Modify](#)

QTY	ITEM	PRICE
	<b>Subtotal:</b>	<b>\$0.00</b>

**Modifier Selections**

## REMOVING ITEMS FROM AN ORDER

Click on REMOVE from the virtual guest check to remove it from the order.



## EDITING ITEMS ON AN ORDER

Click on the **MODIFY** button on the virtual guest check to change items associated with the menu item.



## COMPLETING AN ORDER

Use the following steps to finish the ordering process:

1. Click the FINISH & PAY button, and you will be taken to the PAYMENT SCREEN. (Unless you have not met the minimum order amount, if applicable). In addition, if the customer did not login or sign up at the beginning the customer will be prompted to either LOGIN, or SIGN UP HERE! After they have logged in, or created a new account, the customer is taken to the payment screen where they must choose a method of payment.



[Login](#) | [Home](#)  
[Restaurant](#) → [Type/Time](#) → [Order](#) → [Delivery](#) → [Payment](#) → [Submit](#)  
 Fifers Seafood ... 9/11/2008 5:44:... Done 12 oak

**Current Customers Please Login Below**

E-Mail

Password

[Forgot your password?](#)

**New Customers Sign Up Here!**

- When the Payment screen appears, Select your desired payment, and click NEXT the order. In most circumstances the only choice is MAJOR CREDIT CARD, but some restaurants may opt to allow for “pay-at-the-restaurant/upon delivery” option.

[Account](#) | [Addresses](#) | [History](#) | [Home](#) | [Logout](#)  
[Restaurant](#) → [Type/Time](#) → [Order](#) → [Delivery](#) → [Payment](#) → [Submit](#)  
 Fifers Seafood ... 9/11/2008 5:44:... Done 12 oak

**Payment Details**

<b>Subtotal</b>	\$30.00	<b>Tip</b> <input type="text" value="0.00"/>	<a href="#">18.0%</a> <a href="#">20.0%</a> <a href="#">25.0%</a>
<b>Discount</b>	-\$2.40		
<b>Tax</b>	\$1.66		
<b>Delivery Charge</b>	\$0.00		
<b>Total</b>	\$29.26		

**Payment Type**

CREDIT CARD (Visa, MC, AMEX, Discover) ▾

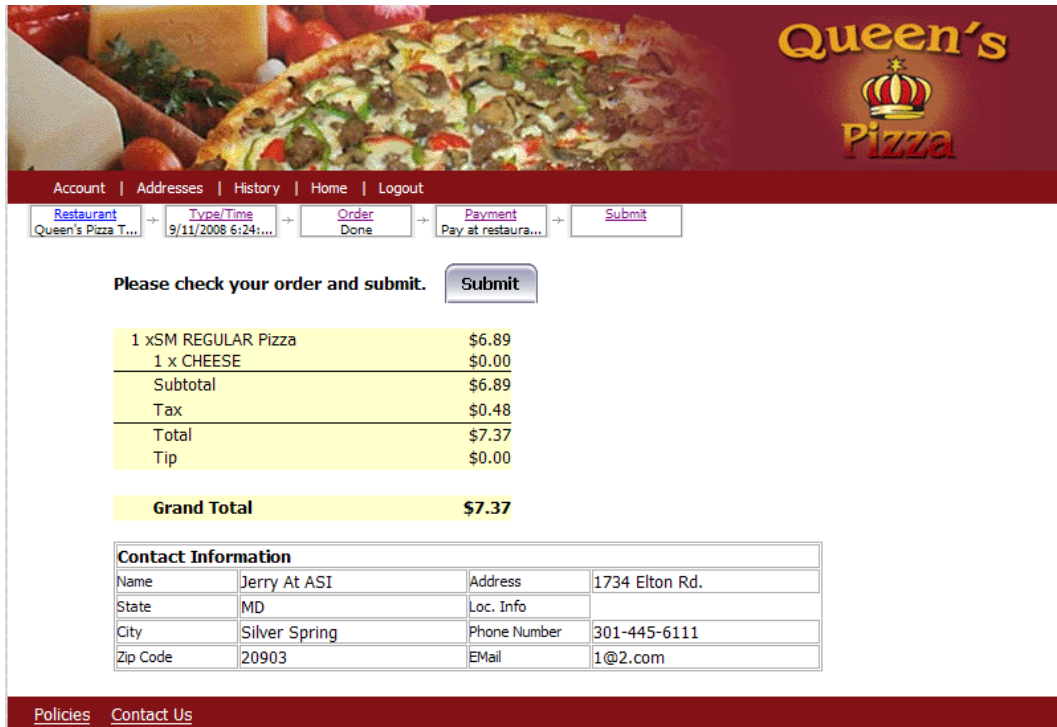
Required Information:

Account Number

Exp. Date (MMYY format) 01 ▾ 05 ▾

[Policies](#) [Contact Us](#)

- Once you click **NEXT**, a screen similar to below will appear:



4. Click **SUBMIT** once the order is verified
5. After the customer clicks SUBMIT, the order is sent to your restaurant's POS system, and it is now treated exactly like any other order in your POS system, except for the fact that there is **NO BALANCE DUE** assuming they paid with a credit card.

## CONFIRMATION

Once the order has been paid for, and accepted by the restaurant, a screen similar to the one below will appear:

**Order successfully sent to location!**  
Please use your browser's print button to print this confirmation page,  
and present it when picking up or accepting delivery.

Restaurant	Customer
United States: OnLine Ordering Sample 2301 South Lake Shore Drive Chicago, IL 60616-1497 SAMPLE !	John 1234 Main Street Anywhere, NA 55555 555-555-5555

At this point you will want to use the browsers print button to print the confirmation page. This step is not required if a printer is not available. In addition, a confirmation email will be sent to the customer account email address:

<b>Web Order</b>																													
Ordered at: 8/6/2010 1:28:01 PM																													
Requested for: 8/6/2010 1:28:01 PM																													
Ready for delivery at: 8/6/2010 1:58:01 PM																													
Type: ....Delivery- Min \$15																													
<b>Restaurant</b>	<b>Customer</b>																												
United States: OnLine Ordering Sample	John																												
2301 South Lake Shore Drive	1234 Main Street																												
Chicago, IL 60616-1497	Anywhere, NA 55555																												
SAMPLE !	555-555-5555																												
	go around back																												
<table border="0" style="width: 100%;"> <tr> <td style="width: 40%;">Nachos</td> <td style="width: 10%;">x 1</td> <td style="width: 10%;"></td> <td style="width: 10%; text-align: right;">3.95</td> </tr> <tr> <td>BEEF</td> <td>x 1</td> <td></td> <td style="text-align: right;">2.00</td> </tr> <tr> <td>Firehouse Chili</td> <td>x 1</td> <td></td> <td style="text-align: right;">3.50</td> </tr> <tr> <td>Super Nachos</td> <td>x 1</td> <td></td> <td style="text-align: right;">5.50</td> </tr> <tr> <td>Min. Order Charge</td> <td>x 1</td> <td></td> <td style="text-align: right;">0.05</td> </tr> <tr> <td>Discount</td> <td></td> <td></td> <td style="text-align: right;">-1.50</td> </tr> <tr> <td>Tax</td> <td></td> <td></td> <td style="text-align: right;">0.75</td> </tr> </table>		Nachos	x 1		3.95	BEEF	x 1		2.00	Firehouse Chili	x 1		3.50	Super Nachos	x 1		5.50	Min. Order Charge	x 1		0.05	Discount			-1.50	Tax			0.75
Nachos	x 1		3.95																										
BEEF	x 1		2.00																										
Firehouse Chili	x 1		3.50																										
Super Nachos	x 1		5.50																										
Min. Order Charge	x 1		0.05																										
Discount			-1.50																										
Tax			0.75																										
<hr/> <table border="0" style="width: 100%;"> <tr> <td style="width: 40%;"></td> <td style="width: 10%; text-align: right;">Total</td> <td style="width: 10%;"></td> <td style="width: 10%; text-align: right;">14.25</td> </tr> <tr> <td></td> <td style="text-align: right;">Tip</td> <td></td> <td style="text-align: right;">0.00</td> </tr> <tr> <td></td> <td style="text-align: right;">Delivery Charge</td> <td></td> <td style="text-align: right;">3.00</td> </tr> <tr> <td></td> <td style="text-align: right;">Auto Gratuity</td> <td></td> <td style="text-align: right;">0.00</td> </tr> </table> <hr/> <table border="0" style="width: 100%;"> <tr> <td style="width: 40%;"></td> <td style="width: 10%; text-align: right;">Grand Total</td> <td style="width: 10%;"></td> <td style="width: 10%; text-align: right;">17.25</td> </tr> </table>			Total		14.25		Tip		0.00		Delivery Charge		3.00		Auto Gratuity		0.00		Grand Total		17.25								
	Total		14.25																										
	Tip		0.00																										
	Delivery Charge		3.00																										
	Auto Gratuity		0.00																										
	Grand Total		17.25																										
<b>Payment</b>																													
Pay At Pick-Up /Delivery: Driver's carry less than \$20.00 cash																													

## PLACING ORDERS VIA CALL CENTER

Your particular establishment may prefer to take customer order via a centralized call center rather than have the customer place the order themselves. If you have chosen this option you will need the following:

1. Computer with internet access
2. A method to login to the Web UI online ordering portal:
  - a. Bookmark, etc
  - b. Desktop short cut, etc
  - c. Toolbar Link, etc.
3. Operator setup with [logon and password credentials](#)

## CALL CENTER PROCEDURES

Placing order via a Center is similar to the steps a customer would perform via the web. There are some extra steps which are detailed below:

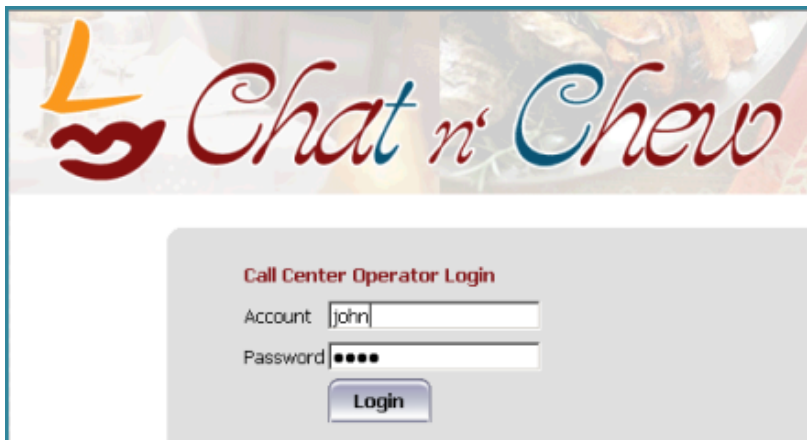
1. Operator must access the Web UI and Log into system by:

**Account Field-** enter login name

**Password Field-** enter employee password

**Login-** Select Login button after entering information in Account and Password fields

Note: Login needs to be performed only once at beginning of shift.



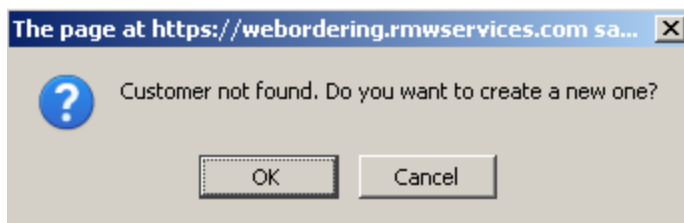
2. Once logged in the Operator will see the screen below. This will be the default screen for the remaining time they are logged into the Web UI page. When a customer calls, the operator will type in the phone number in the available field and then select the Next button.



3. The next screen will vary depending if the customer is already in the database.
  - a. If the caller is already in the database the next screen will be the common URL or web page where a list of each location will be accessible. The Operator should select the location specified by the customer:



- b. If this is the customer's first call (not in database) the operator will be presented a prompt asking if they want to add the new customer: select the "OK" button.



- i. The Operator will be present with a customer registration field

where they must enter information in the data fields. Press the Next button when all necessary fields have been entered.

A screenshot of a web registration form titled "Registration". The form contains the following fields: E-Mail, Password, Confirm Password, Name\*, Address Description\*, Street Address\*, City\*, State (a dropdown menu currently showing "N/A"), Zip Code, Phone Number\* (with three input boxes for area code, prefix, and number), Mobile Number, Loyalty Card, and a large text area for Delivery Instructions. At the bottom of the form are two buttons: "Back" and "Next".

Note: It is highly recommended that the Operator enters a password on behalf of the customer. Failure to do so may have undesirable results for future orders placed directly by the customer. Please see the section on [Passwords and Call Center](#) for issue resolution.

- ii. The next screen will be the [common URL or webpage](#) where a list of each location will be accessible. The Operator should select the location specified by the customer.

4. The remaining order entry procedures will be the same as if the customer placed the order themselves. These steps are outlined in the section: [Placing an Order via the Internet](#)

## **PASSWORDS AND CALL CENTER**

When a customer is registered via call center, he is not allowed to register again (direct OO) using the same phone number. This problem happens only when the call center agent DID NOT enter a password.

If this is so, the customer needs to call the call center and ask the agent to edit his info -- the agent needs to enter **email address** and a **bogus password** (i.e., 12345). To protect his account, the customer should then log in and edit his info ASAP to change the password given by the agent. If during customer registration, the agent DID enter a password (although this is not req.)

The customer can log in directly to OO by:

- in the email address field, enter phone number (follow phone number format)
- in the password field, enter the password given by the agent

In this case, the customer may opt to put in his email address and edit his password (for security purposes) and use the email to log in for his future online orders.

### **ORDER ERRORS**

If customers place an order, and it does not go thru to the POS, the customer will receive an error message similar to the one below:

It seems like the site is experiencing technical problems.
Error Entry Reference #51176
We apologize for any inconvenience.
Please call <input type="text"/> Pizza at 202- <input type="text"/> 7383 to report this error.
<input type="text"/>

If your system is programmed as such, the [ADMINISTRATOR](#) on record with online ordering will also receive an "ORDER DUMP" failure notification, as seen below:

**From:** [rmweborder@actionssystem.com](mailto:rmweborder@actionssystem.com)  
**Date:** 3/10/2009 3:08 PM  
**To:** [\[REDACTED\]](#)

**Exception Identifiers:50927**  
**Order Dump:**

**Web Order**  
 Ordered at: 3/10/2009 6:55:35 PM  
 Requested for: 3/10/2009 6:55:35 PM  
 Type: Delivery

<b>Restaurant</b>	<b>Customer</b>
Chat n' Chew	Thomas, John
1234 Main Street, Centerville	Centerville
	555-555-5555

	x 1		3.50
Edamame			
358 Salmon Avo Uramaki	x 1		6.50
Wafu Salad	x 1		3.50
Wafu Salad	x 1		3.50
401 Salmon Avocado Temaki	x 2		7.00
352 Spicy Tuna Uramaki	x 1		5.50
Discount			-5.90
Tax			0.00

---

	Total		23.60
			0.00
			0.00
			0.00

---

	Grand Total		23.60
--	-------------	--	-------

**Payment**  
 Credit Cards via YesPay  
 RefNo -

It's important to note that if the [ADMINISTRATOR gets an email](#) that reads "ORDER DUMP", the order did not go through the POS. However, in most cases you will have all the information available for contacting the customer to:

- Inform them that their order **did not** go through,
- You have an email copy of the order, and
- Would they like you to fill the order for them?

(continued in Payments)

(continued from Restaurant Manager Back Office Setup RM Back Office)

(continued from Restaurant Manager Back Office Setup RM Back Office)



# PAYMENTS

## CREDIT CARD INFORMATION FOR RESTAURANTS

Most restaurants who accept credit cards for online orders should be advised to do the following:

- Take an imprint of the actual card used, when the customer comes in to pick up the order, or when the drive delivers the order.
- Staple the receipt to the imprint, and file. This will help the restaurant should there be any charge disputes in the future.
- Enable [CVV and AVS](#) verification and match thru the ADMIN pages when setting up their restaurant.
- Print the last four digits of the credit card used for online ordering on the guest check. This will be done automatically as long as the REFERENCE field is set to print on the guest check.
- Ask to see the customer's credit card on delivery orders/pick-ups, and verify that the last four digits printed on the guest check, match the card presented by the customer.

## PAYMENT AT THE RESTAURANT

When a customer comes in to pick up their order, or you wish to dispatch it for delivery, simply click on the tab for that item, and process the order just as you normally would. The only exception is that the order is Paid-In-Full (if paid with CC) .In the case of an online order being paid with a credit card, the order is settled to ONLINE-PAID. If the order was "Pay-At-Restaurant", simply settle the order as you would any other check you are settling at the POS.

When finishing the payment on line, the customer will be presented with a [confirmation page](#) that they are instructed to print, and bring with them to the restaurant for verification. The customer is also mailed an [email copy](#) of the order, once the order goes thru successfully.

We HIGHLY ENCOURAGE YOU to ask your customers who pay with a credit card, to bring that card to the restaurant, for verification. This will help minimize any charge-backs that your restaurant might receive due to stolen cards.

It is advised that you program the LAST 4 digits of the credit card used for the online order to print on the CUSTOMER RECEIPT. In order to do so, just make sure that the REFERENCE LINE is set to print on the customer receipt.

## CREDIT CARD PROCESSING

The credit card account for online ordering is a separate merchant account from your restaurant's "brick-n-mortar" merchant account. There is no processing of credit card information done for online

orders thru your POS; it is all done on the web. Refunds for online orders, however, are processed from your restaurant's POS server, using the Mercury Payment Systems (MPS) Back-Office program. The process for processing card refunds are outlined in the [next section](#).

In order to process credit card refunds for orders placed on line, the restaurateur must first contact Mercury Payment Systems, and request a copy of their "BACK OFFICE" program.

Mercury's tech support will create the appropriate information for you and will provide you with a link to the User's Guide and a link to download the program. MPS will also provide you with the MID that you'll need during the setup.

**REMEMBER TO "ACTIVATE"** your MPS Back Office software before you try to process your first credit card refund. If you need help with activation, call MPS directly at: 800-846-4472



## CREDIT CARD REFUNDS

The following is a detailed description of refunding a customer's credit card account. This section covers refunds when using either [Mercury](#) or [YesPay](#).

### ONLINE CREDIT CARD REFUNDS (PAID VIA MERCURY)

Use the following steps to process an O.O. Refund (i.e. void the CC transaction):

1. You must know the **Reference Number** of the transaction that you need to void. If this is not provided with the order, access the MPS Merchant Portal and run a report.

Mercury Payment Systems :: Microsoft Internet Explorer

Address: https://www.mercurypay.com/mps\_custportal/Reports/MerchantCreditReports.aspx?TID=494901&RptTitle=Real+Time+Processing

MPS MERCURY PAYMENT SYSTEMS

REPORTS | SAVED REPORTS | TOOLS

NO NEW MESSAGES

Real Time Processing Credit Card Reports for Bon Appetit (Test Account)

Selected Report: Today's details with declines & voids

Select Custom Criteria | Reports by Date: Today's details with declines & voids | Reports by Batch:

1 of 1 | 100% | Find | Next

### Credit Transactions - Bon Appetit (Test Account) 494901

8/27/2007 thru 8/27/2007

TranType	Result	Card Number	Exp	Amount	Tip	Total	Name	Operator	Batch	Swipes
Sale	Approved	549999XXXXXX6781	0809	\$5.00	\$0.00	\$5.00			1 2255	Swiped
Sale	Approved	549999XXXXXX6781	0809	\$5.69	\$0.00	\$5.69		ASI Online Ordering	2255	Manual
Subtotal				\$445.42	\$7.00	\$452.42				
Grand Total				\$445.42	\$7.00	\$452.42				

ExecutionTime=8/27/2007 2:56:57 PM

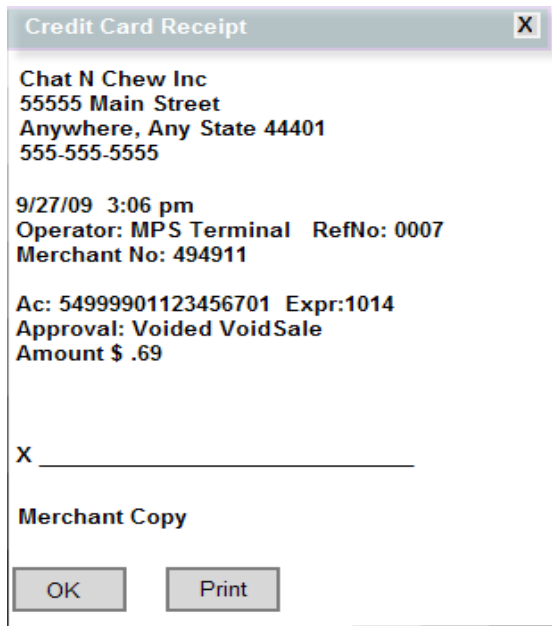
[Return to Top](#)  
Paging Controls are at the Top

2. Run MP Terminal. Fill in the amount and select [Credit Manual]

3. Enter the Credit Card Number on the “account” field. Choose “voidsale” for the Transaction Type then press [Process Manual Transaction]

4. Enter the Reference Number that you got from Step 1 in the prompt below:

5. After processing, you are provided with a receipt:



6. You may check the Merchant Portal to see your voided transaction:

Mercury Payment Systems :: - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address [https://www.mercurypay.com/mps\\_custportal/Reports/MerchantCreditReports.aspx?TID=494901&RptTitle=Real+Time+Proce](https://www.mercurypay.com/mps_custportal/Reports/MerchantCreditReports.aspx?TID=494901&RptTitle=Real+Time+Proce)

BatchClose	Approved			\$0.00	\$0.00	\$0.00		mpsbatch	
Sale	Approved	549999XXXXXXXX6781	0809	\$6.44	\$0.00	\$6.44		1 2255 Sw	
PreAuthCapture	Approved	549999XXXXXXXX6781	0809	\$6.00	\$0.00	\$6.00		10 2255 Sw	
PreAuth	Approved	529149XXXXXXXX4478	0410	\$33.81	\$0.00	\$33.81		test	M
PreAuthCapture	Approved	529149XXXXXXXX4478	0410	\$33.81	\$5.00	\$38.81		test 2255 M	
Sale	Approved	549999XXXXXXXX6781	0809	\$5.00	\$0.00	\$5.00		1 2255 Sw	
Sale	Declined	436800XXXXXXXX4001	1207	\$20.00	\$0.00	\$20.00		NoOperatorID	M
Debit Sale	Declined	549999XXXXXXXX6781		\$25.00	\$0.00	\$0.00		1	Sw
Sale	Approved	549999XXXXXXXX6781	0809	\$5.00	\$0.00	\$5.00		1 2255 Sw	
Sale	Voided	549999XXXXXXXX6781	0809	\$5.69	\$0.00	\$5.69		ASI Online Ordering	2255 M
PreAuth	Approved	400300XXXXXXXX6781	0809	\$2.73	\$0.00	\$2.73		9	M
VoidSale	Voided	549999XXXXXXXX6781	0809	\$5.69	\$0.00	\$5.69		ASI Online Ordering	2255 M
Subtotal				\$439.73	\$7.00	\$446.73			
Grand Total				\$439.73	\$7.00	\$446.73			

ExecutionTime=8/27/2007 3:10:11 PM

[Return to Top](#)  
Paging Controls are at the Top

Done

For additional assistance with online refunds, call MPS directly at 800-846-4472.

### ONLINE CREDIT CARD REFUNDS (PAID VIA YESPAY)

Use the following steps to process Credit Card refunds when using YESPAY:

1. You must know the Reference Number of the transaction that you need to void. This can be found in the customer's Confirmation Receipt.
2. Access WEB Admin User Interface->Restaurants->Payments->Credit Cards via YesPay
3. On the Refund portion, enter the Reference Number (from #1) and press [Search]

Note that Admin Password is re-entered here for security purposes.

(continued in Marketing Tips)

# STAND-ALONE WEB ORDERING OPTION

## **(NOT INTEGRATED TO RM AT SITE)**

If not processing online order through a Restaurant Manger POS system you will have to determine the following:

1. Connectivity
  - Phone line
  - Internet Access
2. **Order Output Device** - (device at the location where order will be displayed/output)
  - Browser
  - Fax
  - Email
3. Order Alert Device
  - Phone
  - Email

## **STANDALONE TERMINAL INTERFACE**

**(For On Line ordering that is *not* integrated to the restaurant's RM POS s/w)**

**(\*\*STILL UNDER TEST. \*\*)**

This interface requires a computer to run the order management software.

Two views are available, Order Management and Order Prep Display. The Order Management screen displays a summary of all the online orders in inverse chronological order (the most recent at the top) with the following information for each order:

- Order Time:
- Customer Name:
- Phone #
- Total
- Elapsed Time: elapsed time since the order was placed.



- Order Type
- Paid:
- Status: order status (see below for options)
- Driver: driver assigned to deliver order.

The following functions are available:

1. View: View selected Order
2. Print: Print selected order
3. Status: allows changing the status of an order to:
  - Pending: order pending preparation
  - Ready: order ready for pickup or assignment to driver
  - In transit: order assigned to driver
  - Closed: order delivered to, or picked up by customer.
  - Assign: Assign order to driver
  - Send: Sends order to POS system. ***Only applicable if used with Restaurant Manager POS.***
  - Prep Display: Switches to Prep Display screen.

The following functions are available in the Prep Display Screen:

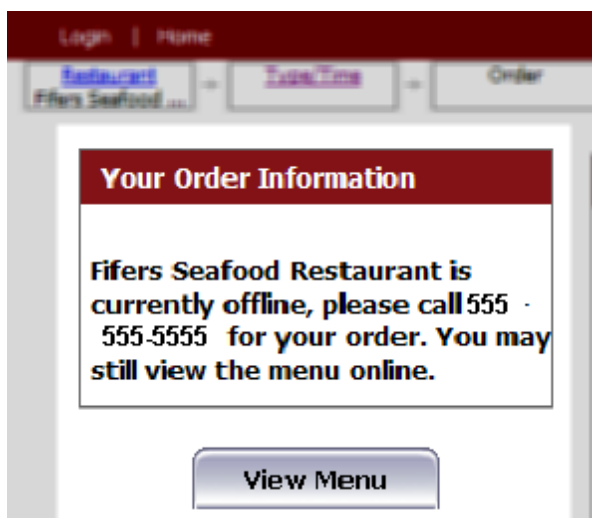
- Status:
- Print
- Assign
- Order Management: switches to Order Management Screen.

(continued from Introduction)

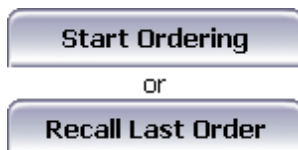
## DAILY OPERATION TIPS

The following are operational tips that should be implemented at the restaurant to insure trouble free operations.

- Make sure [On Line Employee](#) is always logged into system. Orders will not be processed if the OO employee is not logged in. You may want to consult with your local on the configurable options that allow the OO employee to stay logged in.
- Implement the [OO Reminder](#) executable at the On Site server. This executable will force a prompt at the POS whenever the OO Employee is not logged in. The OO Reminder executable should be placed in RM Startup.
- It's good practice to check you online site every day, from no matter where you are, as long as you are connected to the Internet. You can do this by [connecting to your web site](#) and then proceeding to the OO Portal. If you see the button VIEW MENU, your Online Site is OFFLINE, and customers will NOT be allowed to order. This is typically caused when the OO Employee is not logged into the system. the internet connection at the local site is down, or the RM Session is not open.



If you see the buttons START ORDERING and RECALL LAST ORDER then your site is up and ready for customers to start ordering:



- Make sure your Restaurant Manager Session is open well in advance before accepting On Line Orders. Orders will not be accepted if the session is closed. You may want to consult with

your local dealer on automating the Session Open/Close process.

- Make sure all prep printers have plenty of paper.

(continued in Placing an Order via the Internet)

# TECHNICAL NOTES

## SPECIAL PRINTING CONFIGURATIONS

There may be some instances where the restaurant may want to print checks or kitchen slips outside the normal cycle. Example, a restaurant wants a guest checks to [print out immediately](#) upon receiving the order to a selected printer. Another example may be the restaurant wants an [alert to print](#) out when receiving an on line order. Both these example are easily handled within the printing parameters of Restaurant Manager. It is important to remember that all online order printing jobs are subject to normal on site printing rules. Specifically, once an order has been received by the onsite POS system, the printing parameters apply to the order as if it was placed by a POS station.

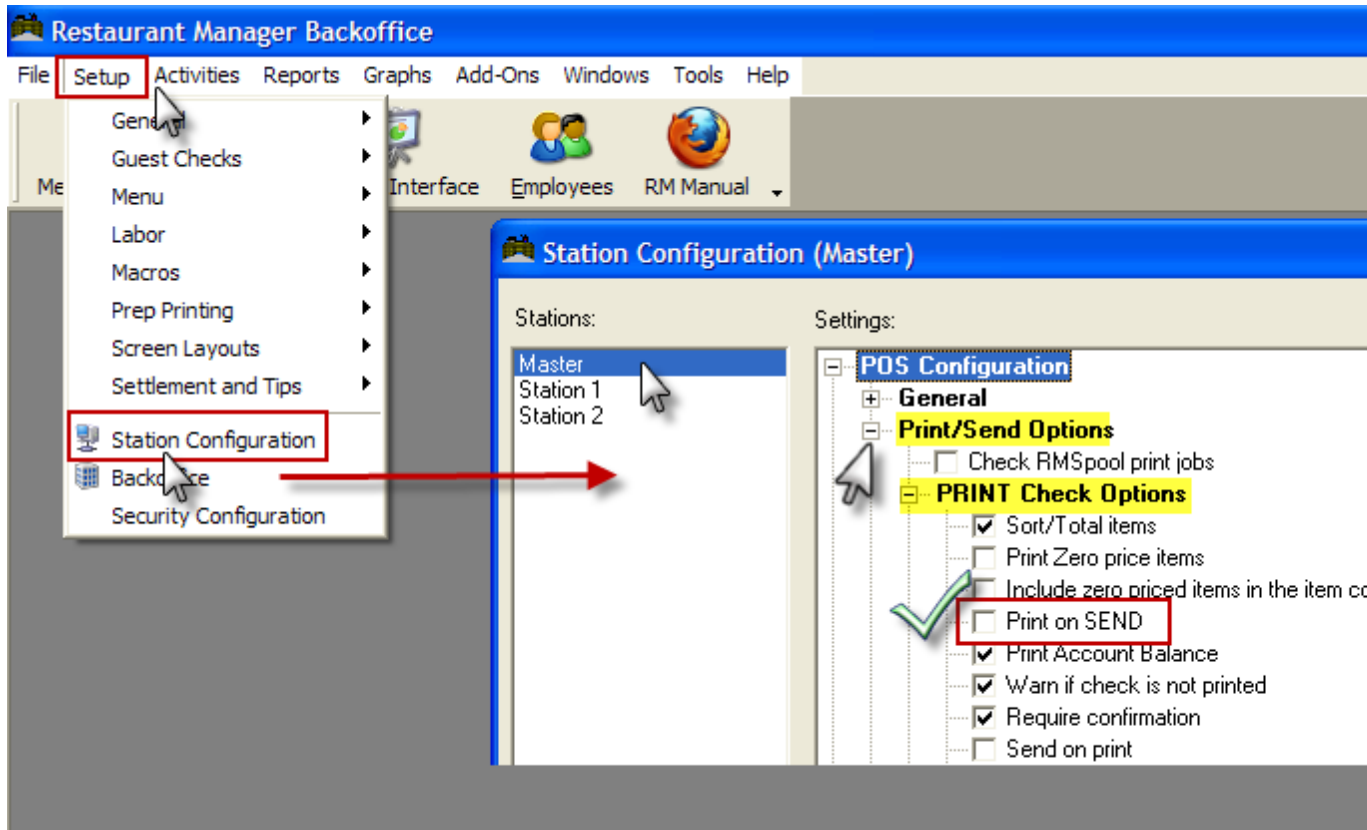
Note: All OO printing functions are handled in the onsite Restaurant Manager Module (RMWin).

**This document section assumes the Master Station Configuration is used to process On Line Orders. If your system has been configured differently, replace the station number used for the Master Station Configuration.**

### PRINTING A GUEST CHECK UPON RECEIVING AN ORDER

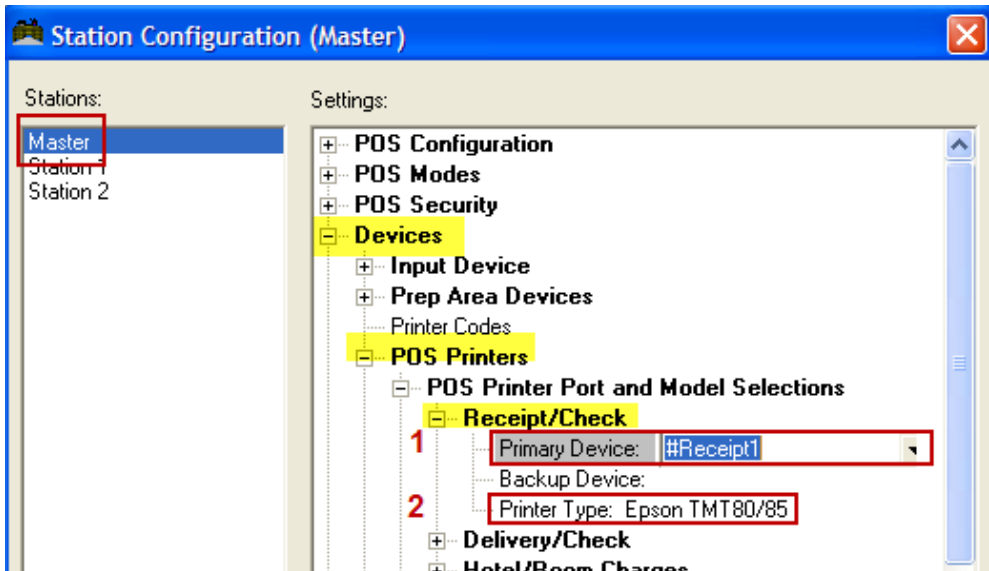
This process is similar to printing a guest check whenever a menu item is sent to a prep area. In fact, we will use the exact same station configuration setting to achieve the desired results:

1. For our first step we will start in the RM BackOffice Module and go to Setup > Station Configuration > Master Station > POS Configuration > Print/Send Options > Print Check Options. Locate and enable the “Print on Send” option listed on the menu tree. Alternatively, use the “Search Settings” function at the bottom of the Station Configuration Setup form and type “Print on Send” to locate and enable the print option.

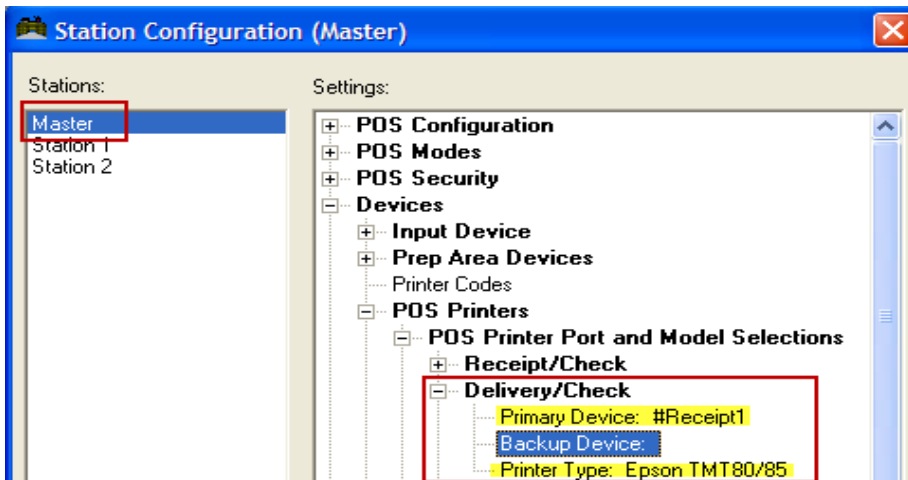


- The second step is dependent on how the Revenue Center has been configured. If the “Delivery Orders” option has been enabled in the Revenue Center Setup form you will need to configure the “[Delivery/Check](#)” option under Devices > POS Printers> POS Printer Port and Model Selections found in Station Configuration. If this option has not been enabled (typical), then the [Receipt/Check](#) option will be configured under the same section of the Station Configuration.

**Receipt/Check-** We will need to assign a station primary receipt/check printer to where the guest check will print. This is accomplished within the Station Configuration setup form. Within the form, use the “Search Setting” function and type “Receipt/Check”. Open the menu tree branch and then double click on the “Primary Device” option. Select the desired station’s printer from the drop down list. A printers name will reflect the POS station it is associated with if configurable correctly in RM Spool setup. In addition, printers’ setup in RMSpool will have a # symbol in front of the name. As example, names like #receipt7, #poschk7, or #check7 would likely be used for denoting a guest check printer used at POS station 7. The next step is to assign the printer type. You can verify the printer type being used at the station by clicking on the station found on the Stations List section (left) on the Station Configuration Setup form.



**Delivery/Check-** If the “Delivery Orders” option has been enabled in the Revenue Center Setup form, we will need to assign a station primary Delivery/Check printer to where the guest check will print. Like the “Receipt/Check” instructions, this is also done within the Station Configuration setup form. Within the form, use the “Search Setting” function and type “Delivery/Check”. Open the menu tree branch and then double click on the “Primary Device” option. Select the desired station’s printer from the drop down list. The next step is to assign the printer type. You can verify the printer type being used at the station by clicking on the station found on the Stations List section (left) on the Station Configuration Setup form.



Note: A printer should never backup to its self and doing so could cause printing error if the primary device becomes inoperable. It is better to choose another station printer or leave the option blank.

## **Printing of Guest Check Automatically w/ Different Revenue Centers**

An account may wish to have a guest checks printed at the time the OO is sent to a printer. What may complicate the issue is if they using two different revenue centers for OO (i.e. pick and delivery) where one revenue center charges for delivery. This can be achieved be creating two revenue centers (i.e. OO Delivery and OO ToGo). In the OO Delivery Revenue Center the following settlement options should be: disable require confirm, send after settle should be “yes”, and condense receipt should be set as “No”. In addition, “Delivery Orders” should be enabled under the Misc Options of the OO delivery Revenue Center.

If the establishment wants a guest check to print for the OO ToGo orders: in settlement options in the OO ToGo Revenue Center disable require confirm, send after settle should be “yes”, and condense receipt should be set as “No”. Do not enable the “Delivery Order” option in the Misc Option of the revenue center if they charge for delivery but not OO Take Outs.

We are assuming that OO is set up using the master station in Station Configuration. It is also recommended that there be a separate station configuration for each pos station avoiding parameter conflicts and subsequent behavior between the OO and fixed pos stations. To affect the desired behavior of having guest check printing at the time of send the order the following setting should be adhered to:

### **1. Under Station Configuration- Print/Send Options**

- Disable Check RMSpool print jobs under Print check options

#### **Under Print Check Options**

- Enable Print On Send (this is a must)
- Disable Require Confirmation

#### **Under Prep Area Send Options**

- Enable Exit After Send
- Enable Auto Send on Exit

#### **Under Devices – POSPrinters > POSPrinterPort and Model Selections**

The following settings are dependent on the revenue center option (Delivery Orders) in the Misc section

- **Receipt Check-** if going to the kitchen and no delivery charge applies (OO ToGo)
  - i. Primary Device: Kitchen printer (i.e. #Kitchen)
  - ii. Secondary Device: Receipt1 (i.e. #Receipt1)

- iii. Printer Type: choose the printer model of the primary printer.
- **Receipt Check**- if going to the guest check printer and no delivery order applies (OO ToGo)
  - i. Primary Device: Receipt1 (i.e. #Receipt1)
  - ii. Secondary Device: Receipt1 Kitchen printer (i.e. #Kitchen)
  - iii. Printer Type: choose the printer model of the primary printer.
- **Delivery/Check**: if going to kitchen printer on delivery applying a gratuity (OO Delivery).
  - i. Primary Device: Kitchen printer (i.e. #Kitchen)
  - ii. Secondary Device: Receipt1 (i.e. #Receipt1)
  - iii. Printer Type: choose the printer model of the primary printer.
- **Delivery/Check**: if going to guest check on delivery applying a gratuity (OO Delivery).
  - i. Primary Device: Receipt1 (i.e. #Receipt1)
  - ii. Secondary Device: Receipt1 Kitchen printer (i.e. #Kitchen)
  - iii. Printer Type: choose the printer model of the primary printer.

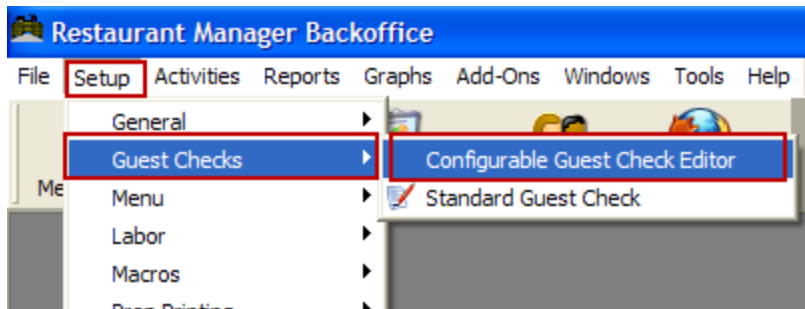
In the circumstance where you want a OO Delivery Order guest check to print to the kitchen printer but a OO ToGo order to go to a receipt (pos) printer, use the following settings:

- Delivery OO Guest Check (marked as Delivery Order in Rev Center) goes to kitchen printer
- Delivery/Check Station Configuration Setting
  - a. Primary Device: Kitchen printer (i.e. #Kitchen)
    - i. Secondary Device: Receipt1 (i.e. #Receipt1)
    - ii. Printer Type: choose the printer model of the primary printer.
- OO ToGo Order Guest Check (not marked as Delivery Order in Rev Center) goes to receipt printer
  - a. Receipt/Check Station Configuration Setting
    - i. Primary Device: Receipt1 (i.e. #Receipt1)
    - ii. Secondary Device: Receipt1 Kitchen printer (i.e. #Kitchen)
    - iii. Printer Type: choose the printer model of the primary printer.



## PRINTING MULTIPLE RECEIPTS

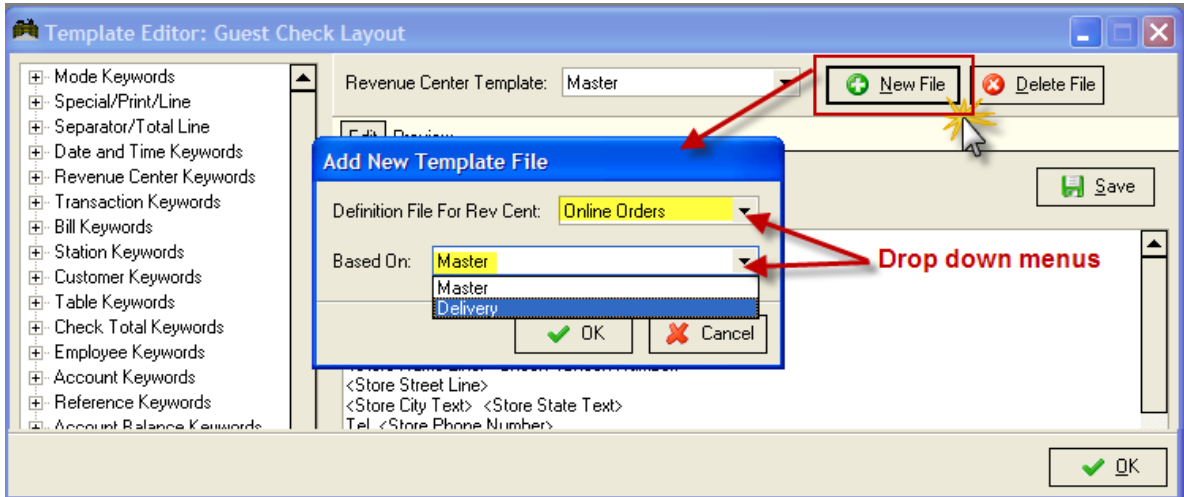
It is common for an establishment processing On Line Orders to require the printing of duplicate guest checks: one copy for the customer, the other for the restaurant. In some circumstance the restaurant may want an abbreviated copy with a signature line. Again, all printing parameters are handled within the onsite RM BackOffice Module and are subject to the same configuration rules established for onsite station fixed POS stations and printers. Thus, all guest check configuration will be designed in the Configurable Guest Check Editor accessed in the RM BackOffice under Setup > Guest Checks.



**Note:** A more detailed description of the functionality of the Configurable Guest check editor can be found in the RM Users Guide.

Using the Configurable Guest Check Editor, you will need to create a "Revenue Center Template" before editing or creating a guest check. Using templates based on a specific revenue center will assure guest check changes and attributes will only occur for orders processed using the specific revenue center (i.e. OO Delivery). Example, you might want a signature line only to print for ON line Orders but not for onsite Table service. Adding a new template is done by selecting the "New File" option on the top of the Guest Check Layout form. Selecting this function will affect a new window "Add New Template File". To add a new template you can do the following:

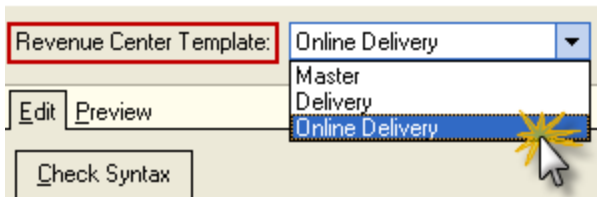
1. **New File-** Select the "New File" button for a Revenue Center-by clicking on the drop down menu connected with this option and then select the revenue center you want the new template to be associated with. In most cases, the revenue center has already been created and will be named accordingly with OO In mind (i.e. OO Delivery).
2. **Based On-** this option will copy an existing template and copy all the settings to the new template. Click on the drop down menu associated with the Based On field and choose a template. As example, your system may have two templates: Master and Delivery. You may want to choose the Delivery Template if the settings are closer to what you need. Note: some systems may utilize only the master template thus reducing your option to one.



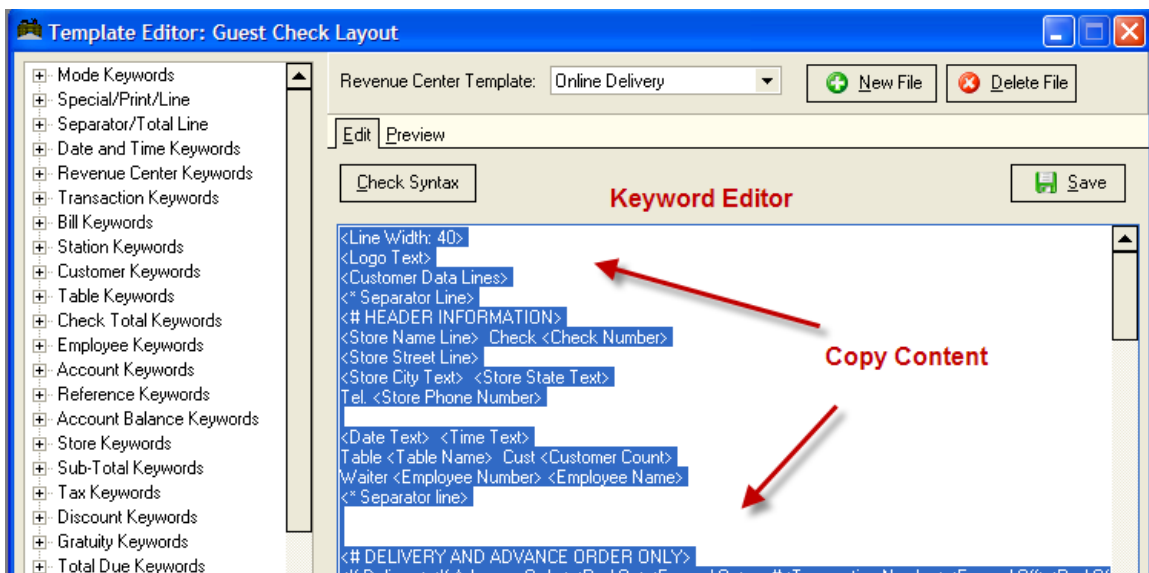
## DUPLICATE GUEST CHECKS (EXACT)

This process is relatively easy. We will accomplish this by doing the following steps:

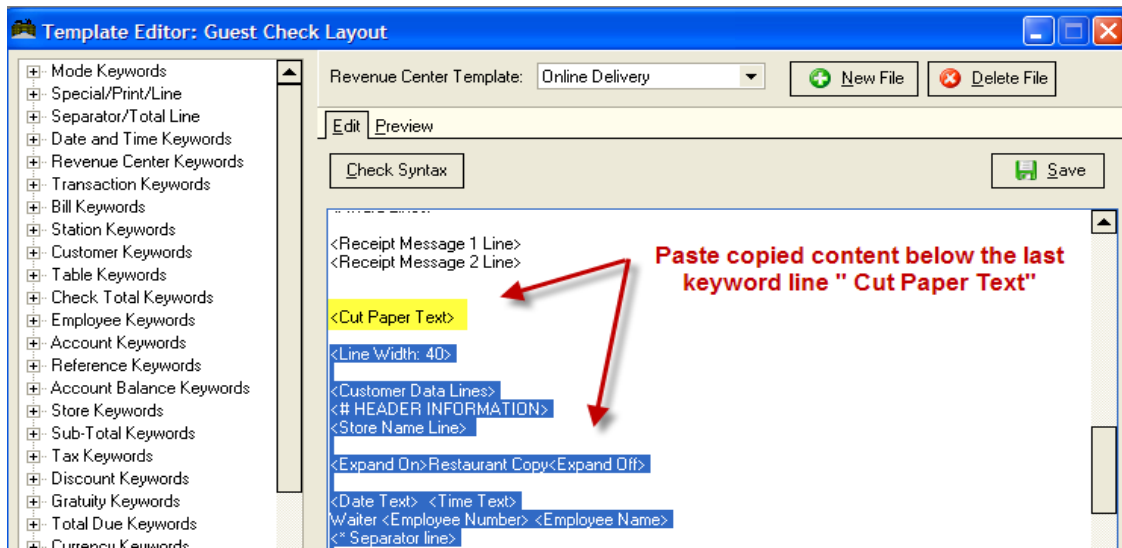
1. Select the Revenue Center template you wish to affect (i.e. OO Delivery) by clicking on the Revenue Center Template option field.



2. Within the Keyword Editor copy all keywords. You can do this by using the shift with the down arrow keys on your keyboard to select the contents and then copy using the Ctrl + C keyboard command. Alternatively, you can click and drag over the content and then right click and copy.



3. Paste the copied content below the last keyword line (should be <Cut Paper Text>).

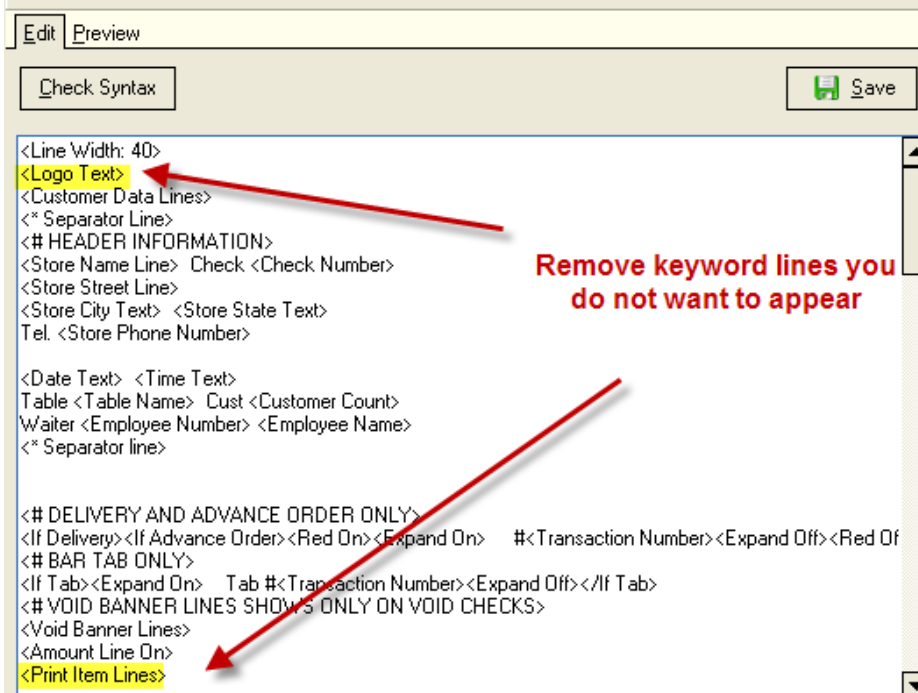


Now every time an order is printer associated with the Revenue Center (i.e. OO Delivery) two guest checks will print out.

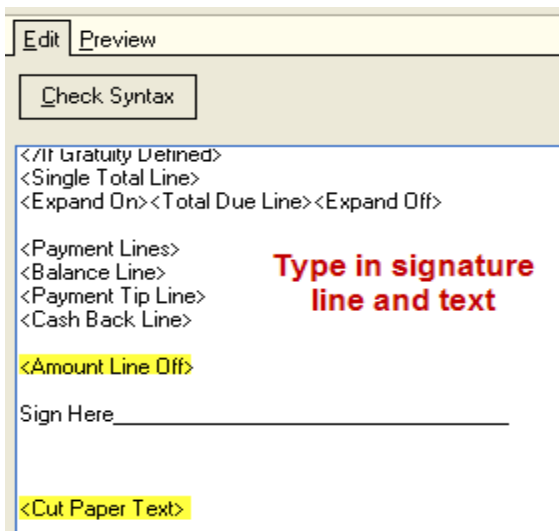
## **TWO GUEST CHECKS/ ONE ABBREVIATED**

There may be some circumstances where you need two guest checks but the second is abbreviated. In our next example will an abbreviated second copy of the check guest minus the menu items but with a signature line for verification. We will follow we follow the steps outlined in the section above and then do the following:

1. Scroll down to the section containing the keywords and attributes of the second guest check on "Keyword Editor" section of the Guest Check Layout form.
2. Select any keywords not need and delete them. Example: if you do not want the logo to print on the second copy, select and highlight the line containing <Logo Text> and delete. Another example if you do want menu items to print, then select the keyword line <Print Item Lines> and delete.



3. Adding a signature line to second guest check- most signature lines are added at the bottom of guest checks. In Our example we will scroll down to the bottom of the second guest check section. Restaurant Manager does not have a keyword for a signature line. You will have to manually type the line in the desired location. In the illustration below, we have typed in “Sign Here” and used the “underline” key function (shift+ dash) on the keyboard to draw the signature line. Additional we have placed the signature line below the <Amount Line Off> keyword and the <Cut Paper Text> keyword. Placing the signature line here will result in having the signature line show below settlement check total information and before the check is physical cut by the printer.



You may want to add additional space separation between the signature line and cut paper keyword by going to the line directly below the signature line and use the “Enter” key on the keyboard.

The end result should look something like this:

The image shows two versions of a guest check side-by-side. The left version is the 'Full Version' and the right is the 'Abbrev Version'. Red boxes and arrows indicate modifications:

- 1st Guest Check (Full Version):**
  - Address: 1234 Main Street, Centerville MM, Tel. 763-515-3590 (boxed).
  - Items: 1 Signature P A S T A (10.95), 1 Penne Pomodoro (7.95), 1 Meatball Linguini (7.95) (boxed).
  - Summary: Taxable: 26.85, Sub-total: 26.85, Tax: 1.34, Total Due: 28.19.
- 2nd Guest Check (Abbrev Version):**
  - Header: ASI Chat & Chew Restaurant, Restaurant Copy (labeled 'Line Added').
  - Date/Time: 11/13/09 1:35 PM, Emp: 1 Ellen.
  - Summary: Sub-total: 26.85, Tax: 1.34, Total Due: 28.19.
  - Signature line: Sign Here (labeled 'Line Added').

Red arrows show that the address and item list from the full version are moved to the top of the abbrev version. The signature line in the abbrev version is added, and the item list is removed.

**Note:** A more detailed description of the functionality of the Configurable Guest check editor can be found in the RM Users Guide.

### PRINTED NOTIFICATION OF ON LINE ORDERS RECEIVED

Restaurant Manager™ makes it possible to send an alert to a remote printer. An alert to a prep or guest check printer may be a preferred method for an employee to realize a new online order has been received. Some of the other methods may be to receive a text message on your cell phone or an e-mail on a computer. However, these methods may add to the cost (text message on cell phone) or have physical restrictions (e-mails only being received on the office computer). Sending a message to a POS system printer proves to be the most cost effective way to implement on-line order alerts. In our process to set up at printer alert, it is assumed that a printer has already been setup for the station that we want to send the alert to. More information on setting up printer can be found in the Restaurant Manager™ User Guide.

Sending a printed alert to a remote printer is a three step process:

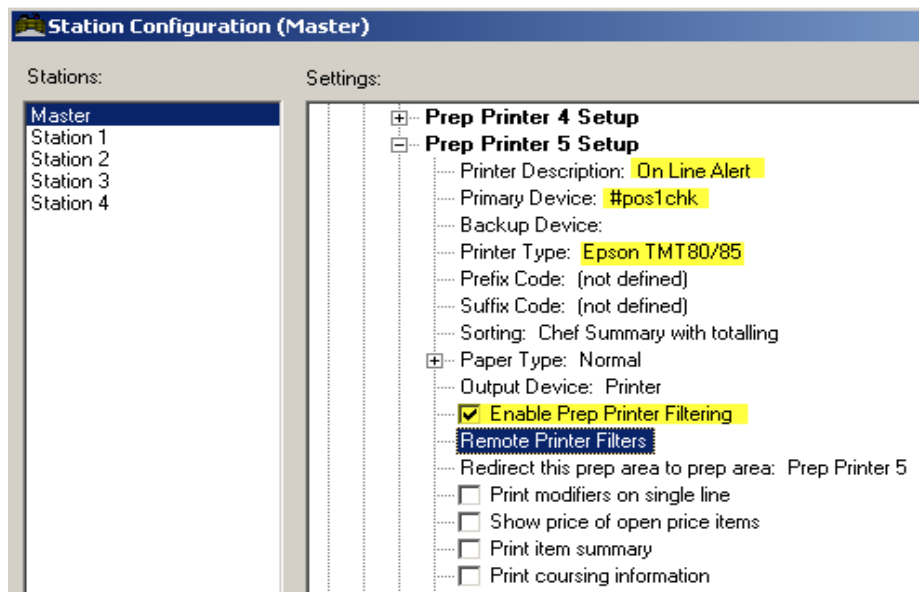
- [Configure a printer](#)
- Create a [printer template](#) based on a printer with our customized text
- Setup a [menu item](#) to be used as a trigger send the alert message

Using the following steps to setup a printed alert to a station printer:

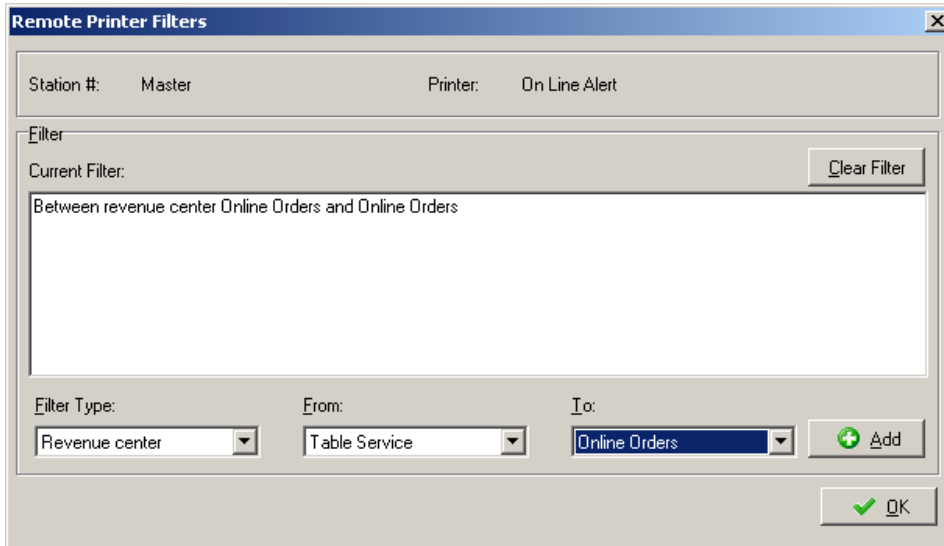
1. **Setup Printer-** In station configuration, choose the station to modify then go to Devices> Prep Area devices> Select a prep printer not in current use(i.e. prep printer 8) and then:
  - a. Enter in Printer description in the “Printer Description Field”
  - b. Enter a Primary device in the “Primary Device Field” (i.e. Cashier check printer).
  - c. Define printer type
  - d. Enable “ Enable Prep Printer Filtering”
  - e. In the Remote Printer Filter form- Select the Filter Type option and choose a the Revenue Center option from the drop down menu.
  - f. In the “From” option- choose the revenue center associated with online ordering (i.e. On Line Orders)
  - g. In the “To” field setting - choose the revenue center associated with online ordering (i.e. On Line Orders)

This will limit tickets to just Online Orders. Use whatever revenue center name used to define OO.

Station Configuration Setup example:



Printer Filter Setup Example:

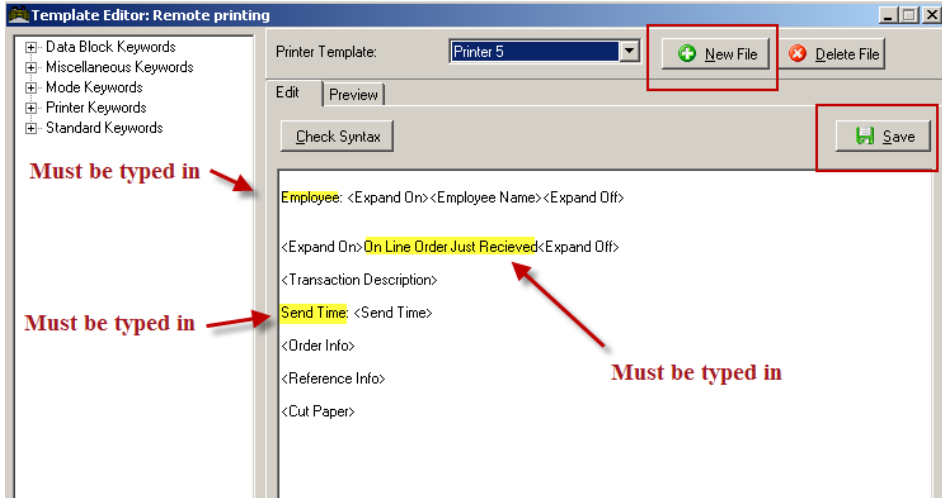


2. **Setup Printer Template**- the second step is to configure a remote printer template where we will define a custom message and limit the message to the appropriate printer. In RM Back-Office go to Setup> Prep Printing > Printer Template Editor

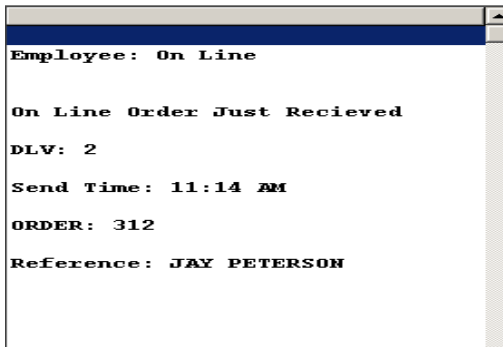
- a. **Add a printer template** – Click on “New File” > choose the printer number setup in Station configuration.
- b. **Text** – erase all information in template editor and insert the new text parameters as listed below
  - i. Employee: <Expand On><Employee Name><Expand Off>
  - ii. <Expand On>On Line Order Just Received<Expand Off>
  - iii. <Transaction Description>
  - iv. Send Time: <Send Time>
  - v. <Order Info>
  - vi. <Reference Info>
  - vii. <Cut Paper>

**Note: Employee, On Line Order Just Received, and Send Time must be typed. The typed text can be replaced to better suite your needs. You may also copy and paste the above text into the check editor**

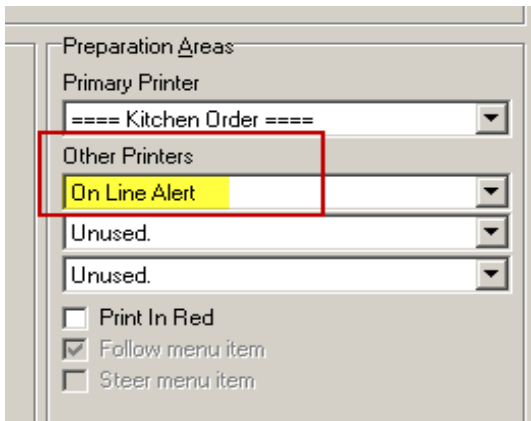
Template Editor Example:



Ticket and printer should look like this:



- Menu Setup-** We are going to add the printer we setup in station configuration to all items available for on line ordering. This will serve as our trigger to send the custom message we setup in the remote template editor. This is done in RM BackOffice > Menu Setup. The same procedure of adding printers to menu items is incorporated. However, you will be adding a second printer under the "Other Printers" located in the menu item set-up form. All On-line orders menu items must be setup with the new printer to guarantee the special text alert will be sent.





Note the alert will only be sent once to the specified printer despite having it attached to all online order menu items.

### USING “MODIFY ITEMS BELONGING TO GROUP” OPTION

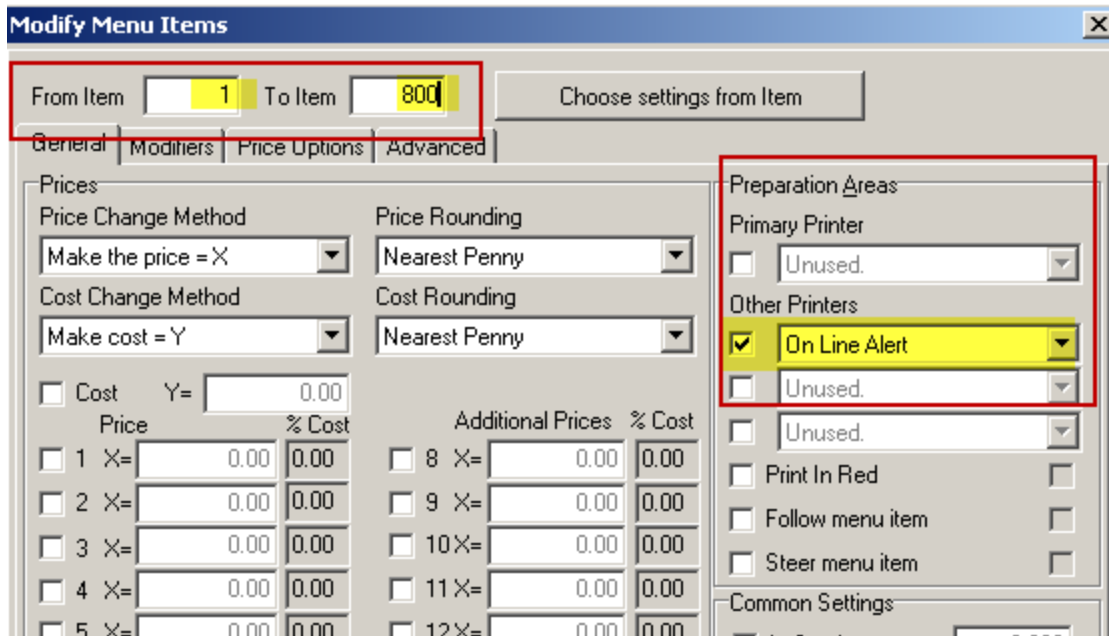
To make large scale changes at once in menu setup: click on the “Modify Items belonging to the Group” button. Go to the “Preparation Area” heading. Under “Other Printer” heading, place a check mark next to the printer field to activate the field where you are going to add a printer. It is important that this is the only check mark that you place. Any other check marks will change the data for those fields as well and may produce undesired results. Add the printer you set up in the station configuration by using the drop down menu in the printer box that you just checked. By default, the plu items in this group will fill in the fields “From Item- To Item”. You can always make mass changes to the menu by increasing the plu range. However, make sure that you do not exceed menu item “3600”. Anything above this number is a modifier. To save changes click “Next”. In the next screen click on “OK” to save changes. Please note that a check mark will appear in the “include” column corresponding with menu. Anything marked with a check will be changed.

To expedite this process, you can use “Modify Items belong to group” in the “Description” heading of the group set-up field.

The screenshot shows a software interface for modifying menu items. It is divided into several sections:

- Description:** Includes fields for Name (Sandwiches), # (34), Type (Food), and Category (no category). There are also buttons for 'Edit Free Modifiers', 'Clear', and a 'Coupon Group' checkbox.
- Button bitmap/color/size:** Includes a button image, Filename (SANDWICH.BMP), Color (Red), and Group Button Sizes (Use Syscnfg setting). A button labeled 'Modify items belonging to this group' is highlighted with a red box.
- Security:** Includes a field for Security Level to Access (0).
- Active/Inactive:** Includes an 'Inactive' checkbox.
- Delete Gr:** A button partially visible on the right side.

Modify Menu Items screen



## WOHH: NOTES FOR SITES W/ WOHH INSTALLED AND IN USE

RM Back Office allows you to manually give each menu item a custom abbreviation, for use with the WriteOn Hand Held.

Some or all of your menu items may have special abbreviations or numbers (for WOHH use) in FRONT of the menu item description, to make it easier and faster for users of the WOHH to find items.

This works fine at the POS, and on the Hand Held. Where it gets "a little ugly" is when these menu items are displayed on the web. (see below)

Effect of NOT CHANGING abbreviations in RM Back Office on how the menu items will display on the OnLine Ordering pages... (By manually changing the abbreviations for each menu item in in Back Office, and then LOCKING the menu item, you can eliminate the "number" in front of the menu item from showing on the OnLine Ordering pages...

32 TEXAS CHEESEBURGER \$3.20 Add

36 LARGE HAMBURGER STEAK \$4.70 Add

37 CHEESE STEAK \$5.29 Add

35 MUSHROOM SWISS BURGER \$3.50 Add

**GUEST CHECK**

For Carry Out - 2/14/2009 7:30 AM --Modify

QTY	ITEM	PRICE
Subtotal:		\$0.00

You accomplish this from the RM Back Office: (see below)

Restaurant Manager Backoffice - [Menu Setup]

File Setup Activities Reports Graphs Add-Ons Windows Tools Help

Custom Menu Setup Send EMail Report Interface Employees

Bar Menu Food

Description Name: Appetizers

Group: Edit Free Modifiers

Type: (no category)

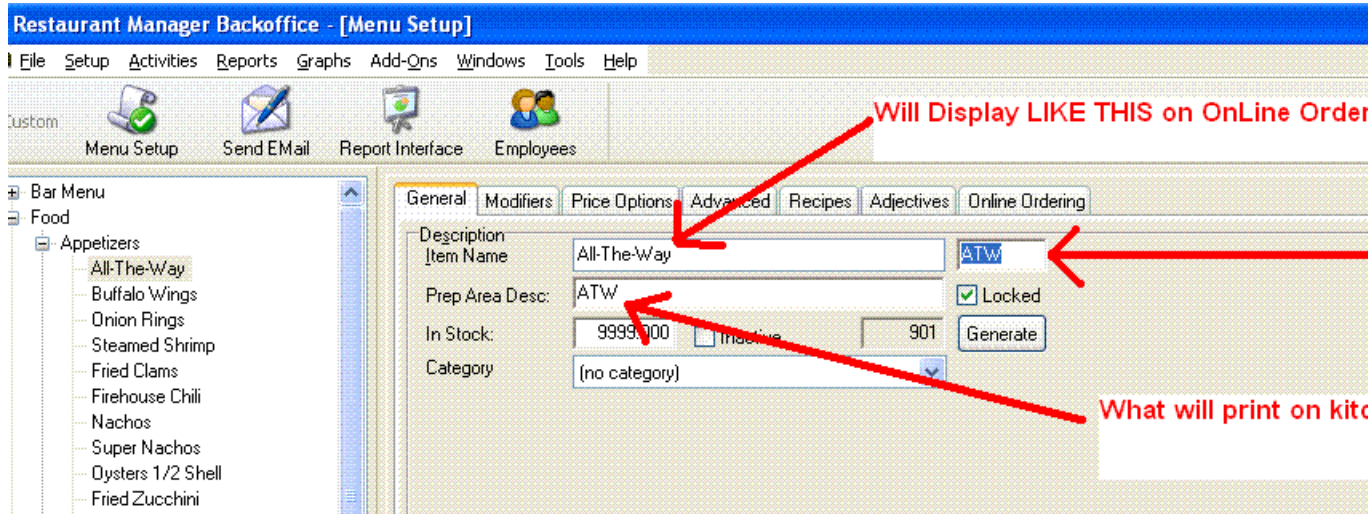
Security Level to Access: 0

Current Group: Appetizers

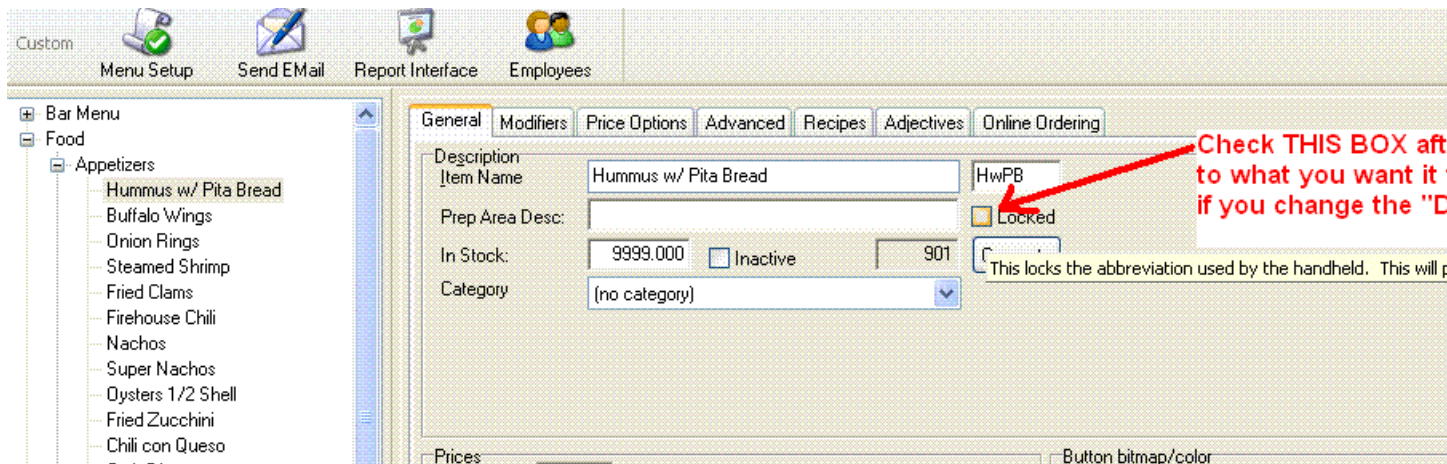
B B Q Shrimp Steamed Shrimp Buffalo

Other option is to RIGHT CLICK on the Group Name, and select "Lock All Abbreviations". (After you have made all of your abbreviation changes to each menu item.....)

Or you can do by INDIVIDUAL menu item (see below)



To LOCK an individual item, as opposed to locking all items in a group. (see below)



## UPGRADING FROM VERSION 16 TO VERSION 17

The following are the upgrade procedures for upgrading a site on v.16 to v.17 using OO.

1. Disable all routing modes In ADMIN UI so any online order is disallowed. (**Dealer** or **Owner** can do)
2. Upgrade the RMServer to v17 (use latest patches, and READ the new info about the WOHH upgrade (**Dealer**) If you want to verify that you have the WOHH s/w installed correctly, copy-n-paste this url into an internet browser address bar, and it should return a page like you see below: <http://localhost:9644/>
3. Open port in site's router for On Line Ordering (i.e. 9644). Make similar change or allow an exception if the server uses the Windows Firewall. (**Dealer**)

4. Access ASI Admin UI, select Chain and change to v17 (**ASI**)
5. still on ASI Admin, select Restaurant and change to v17 (**ASI**)
6. Find the OOLINK.exe, and rename it accordingly. It is no longer used with v.17. (**Dealer**)
7. Go into RM BackOffice and perform a menu upload, pick any menu item, click the On Line Ordering TAB, and click GENERATE WEB MENU. (upload all). *Before you can do the upload, you will need to **enter correct data** in the [Web Service] Tab under [Web Upload Setup].* The URL to use for v.17 is: <http://webordering.rmwservices.com/v17.0.DbGate/FileOp.aspx> *The "Chain Connection ID", "Restaurant Connection ID", "Admin UserName", and "Admin Password" are all identical to what was in the OOLink.exe*
8. Enable the Email (or Fax) Routing Mode only then test. (**Dealer** or **Owner** can do)
9. If result is OK, enable RM Routing Mode; test again. If site has pizzas, order pizzas(**Dealer** or **Owner** can do)
10. Check the order in the POS and verify the following
  - a. Is discount correct?
  - b. Is tax correct?
  - c. Delivery charge correct?
  - d. Tip correct? (**Dealer** or **Owner** can do)
11. If the site is going to use the OO coupons for v.17 (remember, these are NOT the same coupons that are in the POS) please follow the instructions below.

**COUPONS:** An alternative method to using [discounts](#) to drive business is the use of Coupons (fixed dollar discounts). The setup of the actual coupon is *first performed* in the RM BackOffice Module in the Menu Setup form, by creating a negative priced menu item. A more detailed coupon setup description can be found under the section: [Dollar Discounts For Online Ordering](#).

(continued in Appendix: Additional Sources)

## APPENDIX: ADDITIONAL SOURCES

Additional On Line Ordering and Restaurant Manager programming information can be found by clicking on one of the following links:

- [OO Installation and User Guide- HTML Format](#)
- [OO Installation and User Guide- PDF Format](#)
  
- [OO Common Support Issues Guide- HTML format](#)
- [OO Common Support Issues Guide- Mobile Format](#)
- [OO Common support Issues Guide- PDF Format](#)
  
- [OO Best Practices Guide- PDF Format](#)
  
- [RM and Reseller PCI Compliance Guide](#)
  
- [Restaurant Manager Version 17 Manual](#)

## APPENDIX- REINSTALLATION

There may arise an event where OO and all related executables must be re-installed on a new computer (i.e. fire, flood, hard drive failure, etc). Use the following as a general guide when re-installing on a new computer.

- If an version 17 or later site, and *not* using Tunnelier, [install Tunnelier](#).
- Make sure latest RM and WO build are installed.
- Make sure [Tunnelier](#) is installed, and proper profile and credentials are entered in ADMIN UI (shouldn't have to change)
  - Tunnelier (OO profile and PublicKey are stored should be in RMWin folder for existing sites, and named: oo.tlp, & PublicKey.txt)
- IF v.16, make sure IIS is running and properly configured, make sure RMServices is running. Please refer page 62 of the [Version 16 Installation Guide](#) for specific instructions.