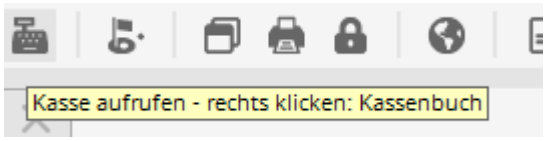
Operating the cash register: user interface starting with 2016

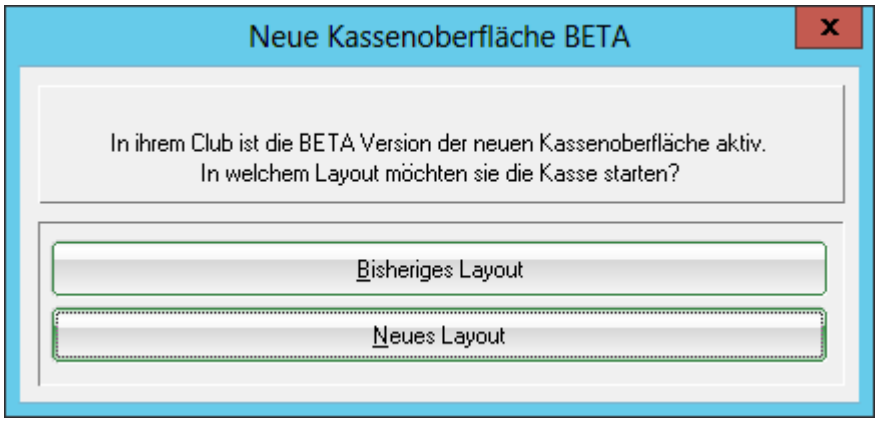
The main change is the creation of a head navigation with „customer / tables / sales“. This creates room for a large number of quick selection items in the sales mask - the most frequently requested improvement by many customers. The head navigation also results in more space in the customer mask, for example, for a directly displayed person picture as well as a clear table plan. Additional buttons in the head navigation for the timetable (direct in the cash desk view), and in the next version also to the online Table reservation display of PCCO, makes the new surface even more clear for specialized „golf gastro cash register“.

Please change to the register account area, for example, ***GASTRO.***

Call the cash register via the button ***Cash register*** in the PC CADDIE toolbar or via ***Accounts/Cash register:***

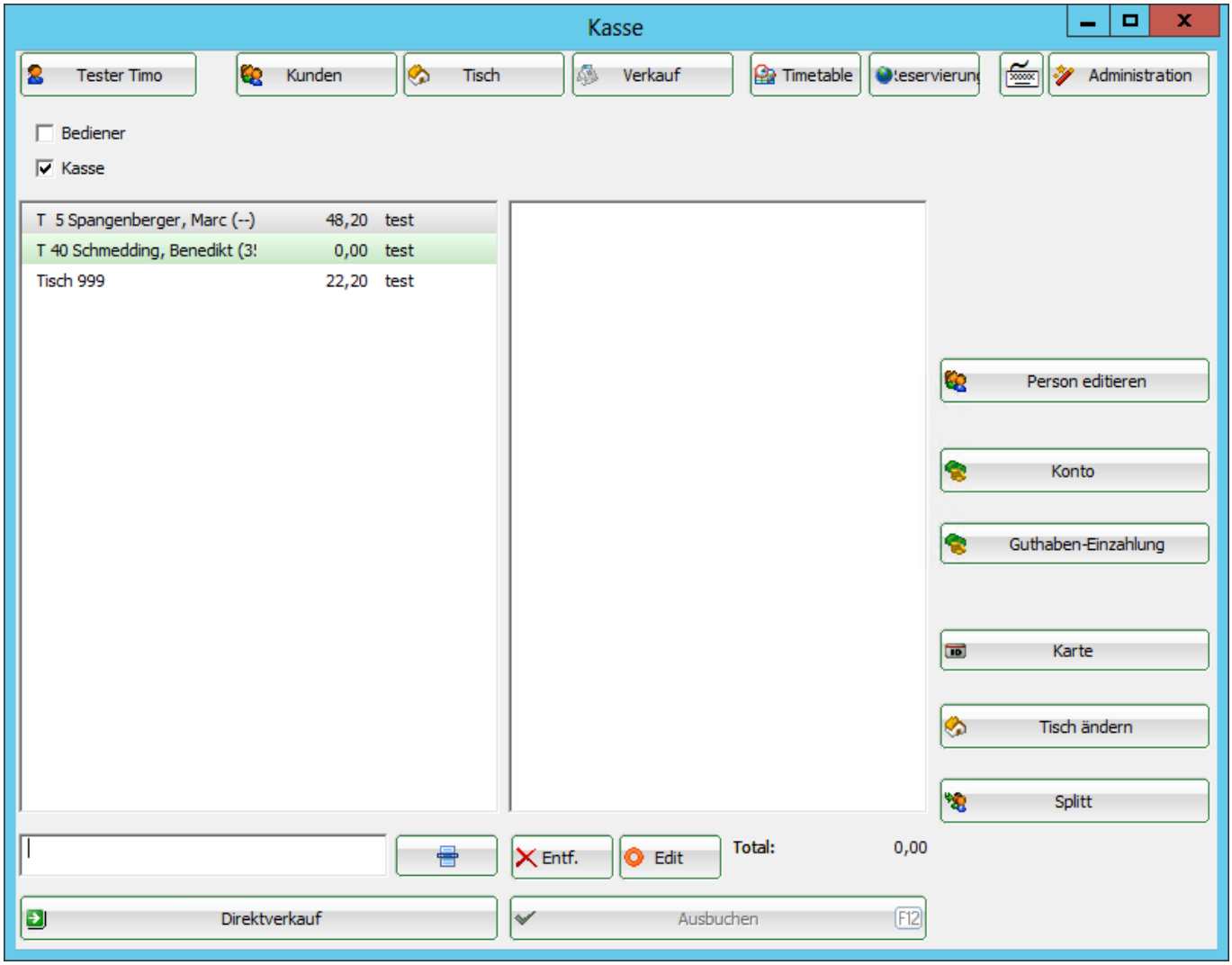


It opens a query window regarding which layout should be started; click ***New layout*** to start the new interface:



The opened cash window looks as follows:

Customer level



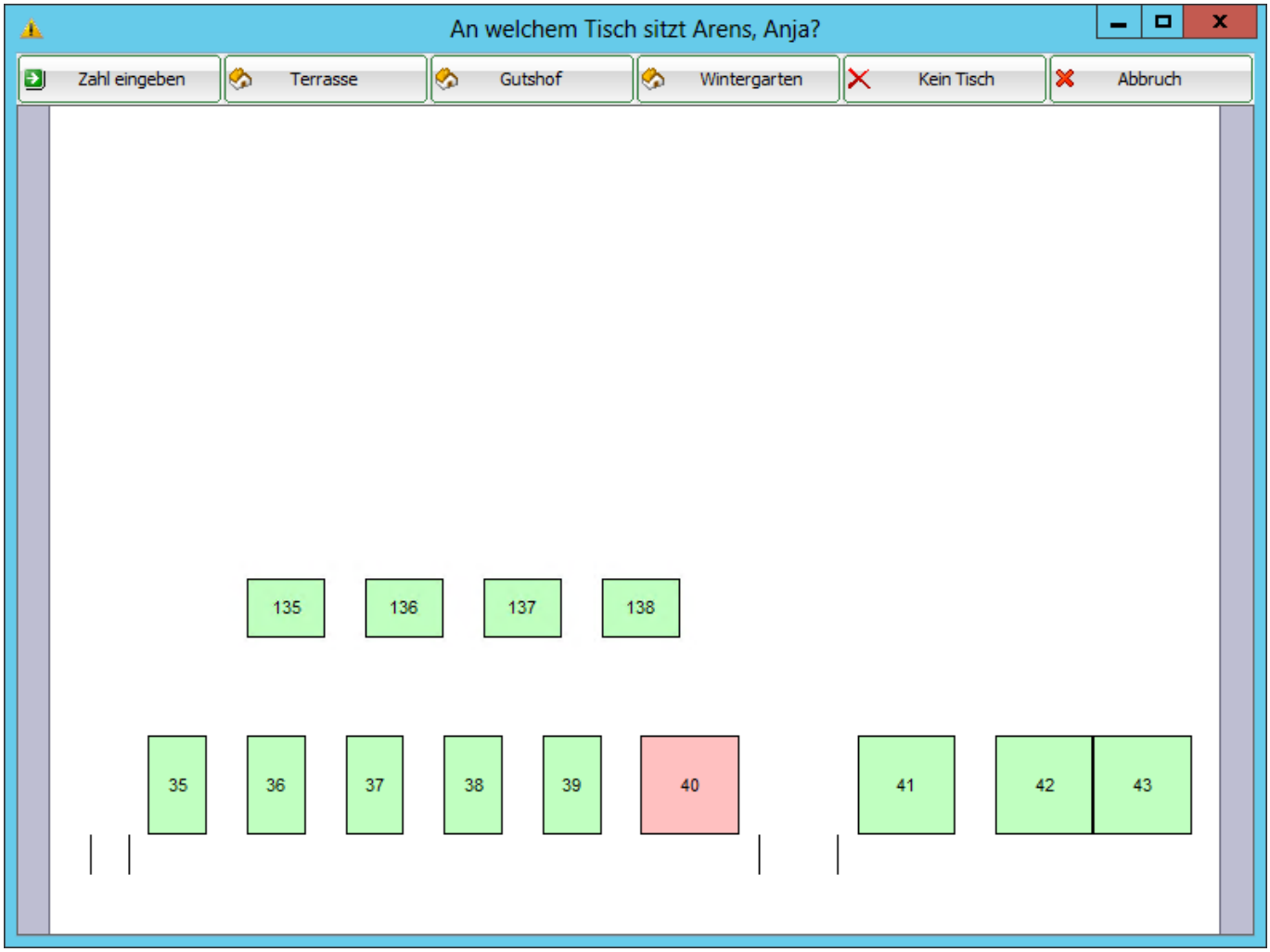
Here you can edit the previously selected **Person** or open the sales or clearing **account**, **deposit credit** or recharge **Card**. You can also **change the table** or **split** an item booking.

Select customer

At the bottom left of the box, enter your guest's abbreviation, full name, or even just part of the name, and the matching people will be shown to you. Another option is the button for the list function right next to it. If you have a magnetic card reader, you can pull through the magnetic strip of a DGV badge and the customer will be selected immediately. It works in the same way if you have a Mifare reader.

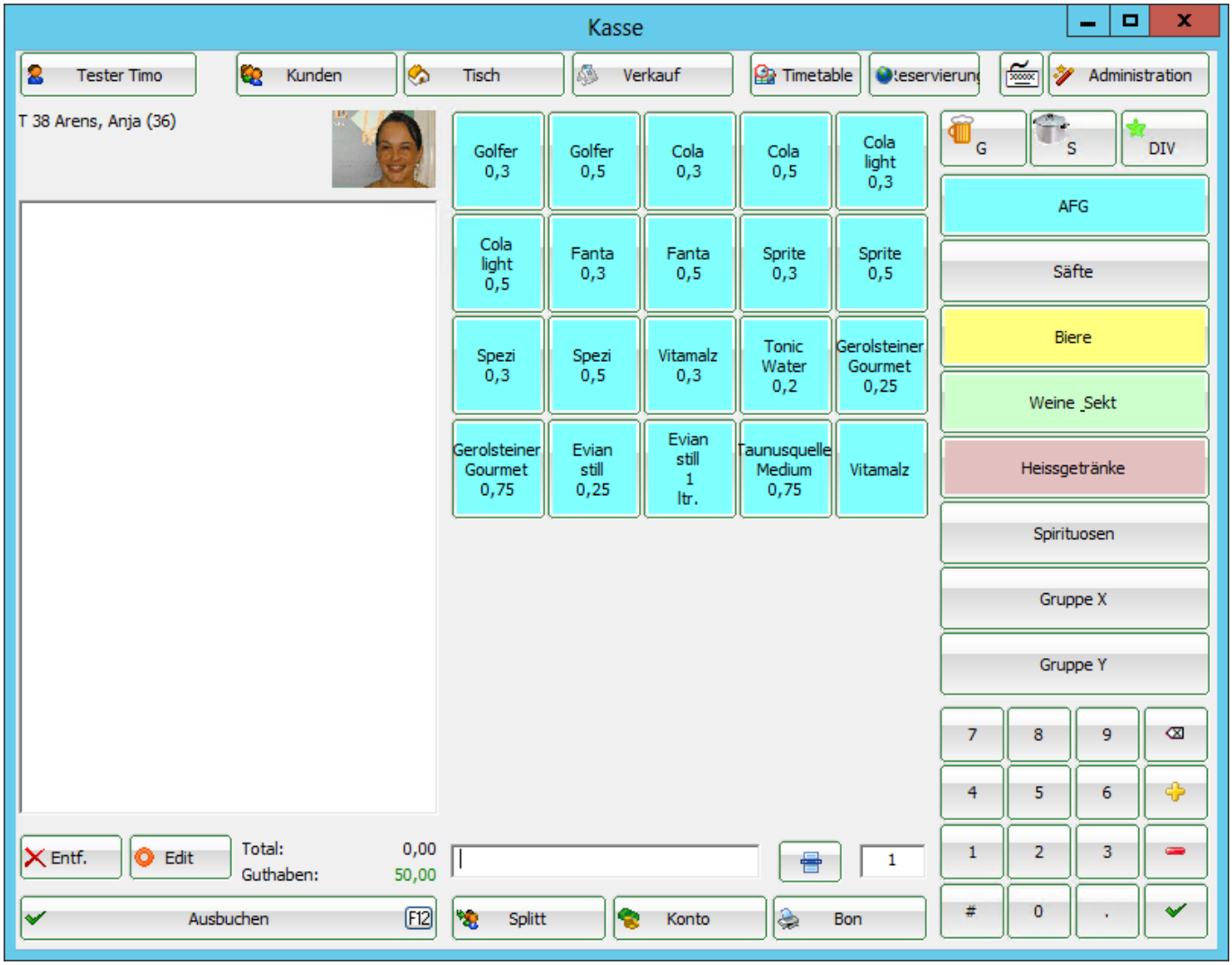
If the person does not yet exist in PC CADDIE, it will be created with ***Add new person***. If you do not want to create the person, for example if you just sell them a cereal or chocolate bar, go to the button ***Direct sell.*** Alternatively, you can also go over the table and book directly on a table.

The table prompt opens after selecting the guest. Here you can either directly click on the table in the table plan, or access it via the button ***Enter number*** from the top left, and type in the number as usual.



If the table is selected, PC CADDIE changes to the sales view.
For creating the plan of the tables with the graphic editor.

Sales level



There are several possibilities for article selection in the input field:

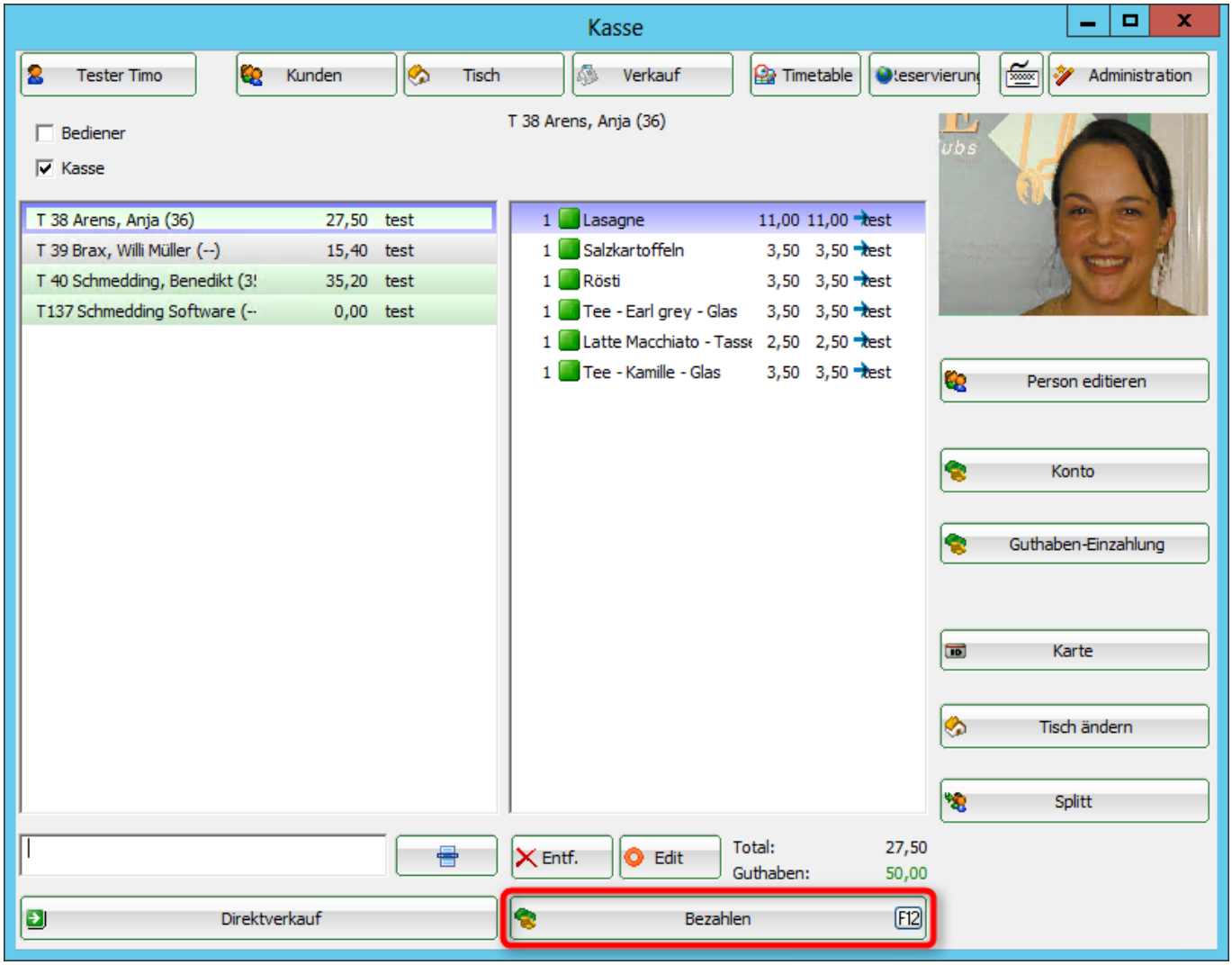
- Enter the article number of the article
- Enter the name of the article or only part of the name
- Button List function (F2)
- Scan the item if here is a label with barcode

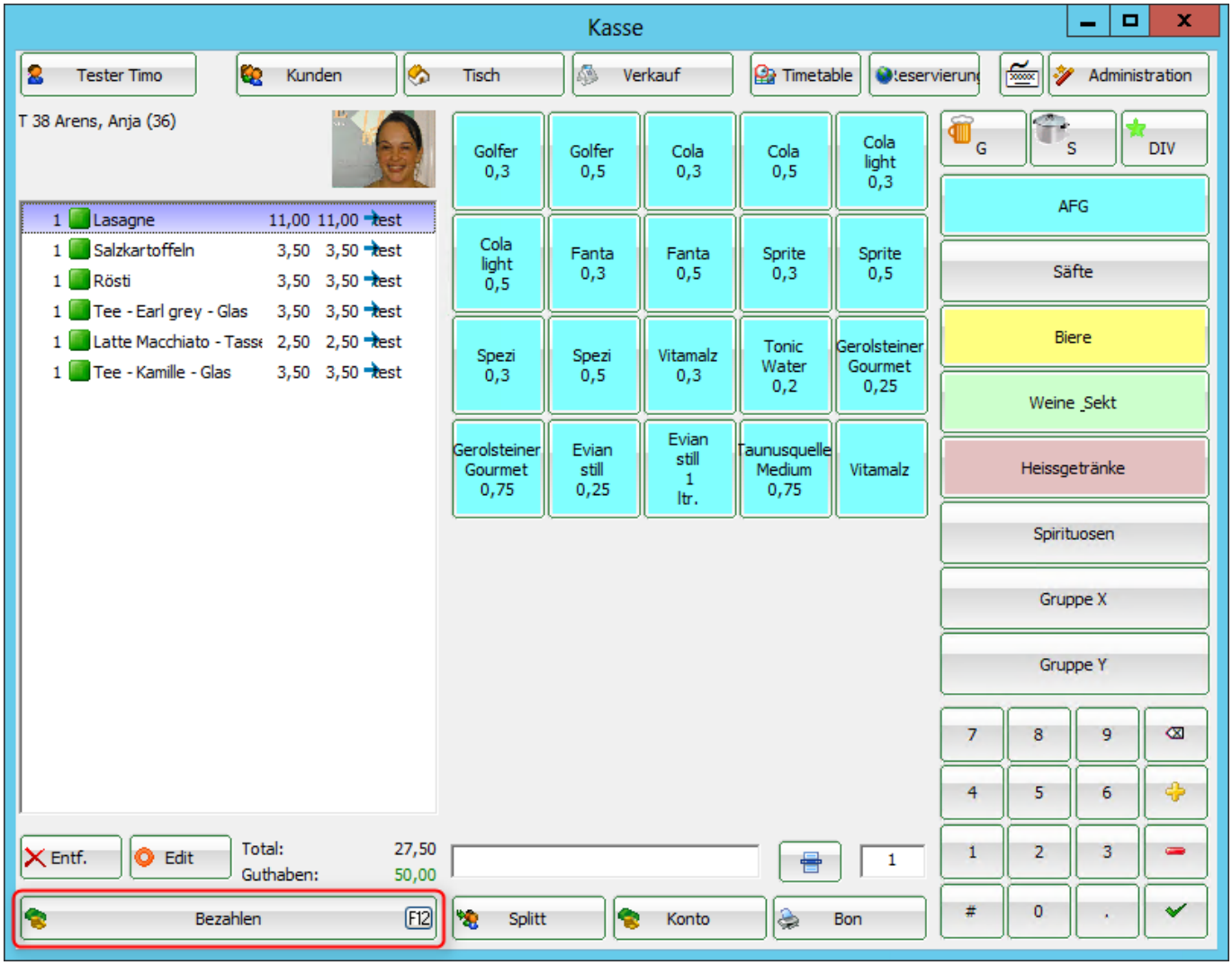
The article is immediately booked in the cash register after pressing ***OK***. After selection, you can increase the number in the field ***Number***, if necessary.

We recommend the quick selection for exploiting the full potential of the new interface (see Quick selection in the catering checkout).

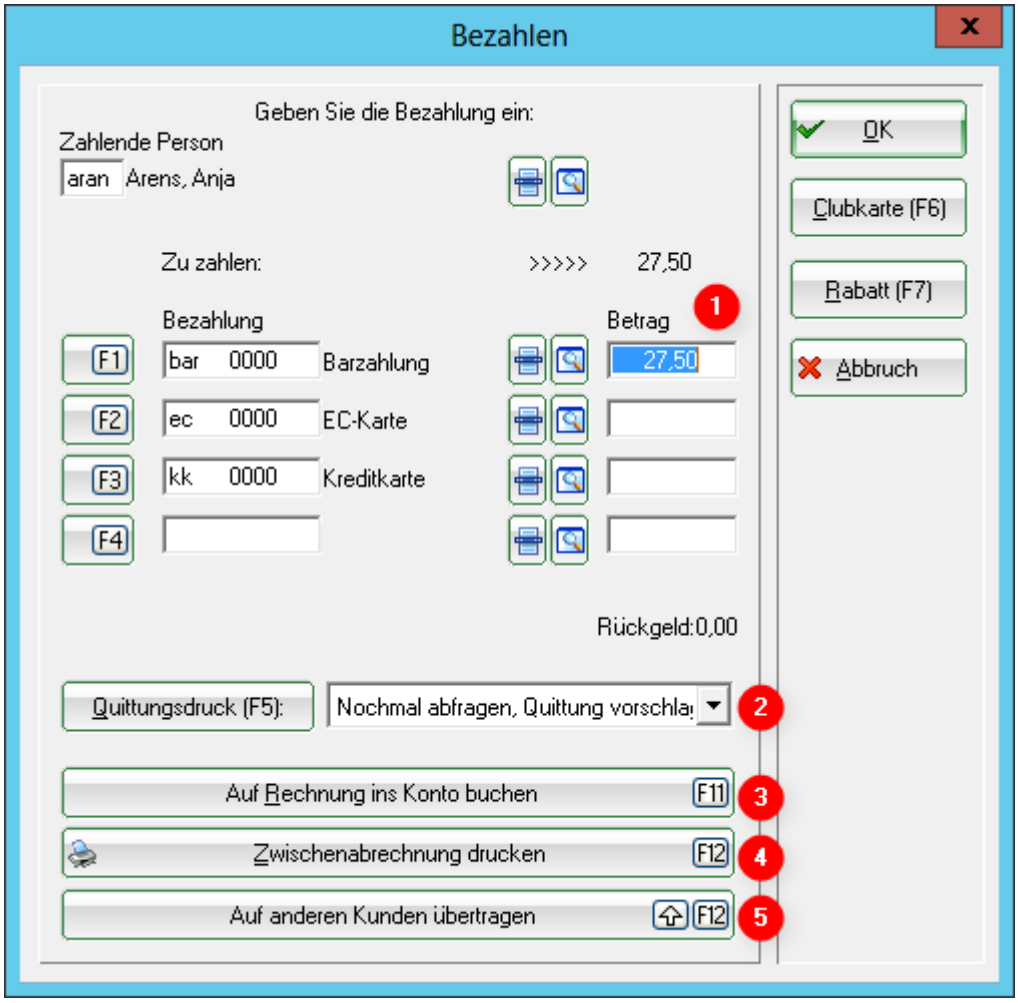
Payment

Start the payment process by clicking the button ***Pay***(F12). You have this button both at the customer level as well as at the sales level.

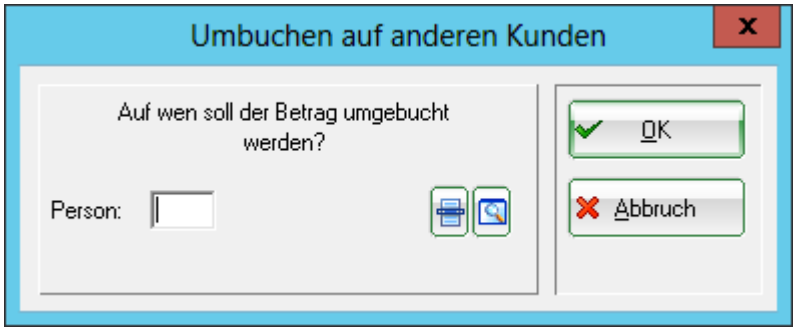

Kasse
Tester Timo
Kunden
Tisch
Verkauf
Timetable
Administration
Bediener
Kasse
T 38 Arens, Anja (36)
T 38 Arens, Anja (36) 27,50 test
T 39 Brax, Willi Müller (--) 15,40 test
T 40 Schmedding, Benedikt (3! 35,20 test
T137 Schmedding Software (-- 0,00 test
1 Lasagne 11,00 11,00 test
1 Salzkartoffeln 3,50 3,50 test
1 Rösti 3,50 3,50 test
1 Tee - Earl grey - Glas 3,50 3,50 test
1 Latte Macchiato - Tasse 2,50 2,50 test
1 Tee - Kamille - Glas 3,50 3,50 test
Person editieren
Konto
Guthaben-Einzahlung
Karte
Tisch ändern
Splitt
Entf.
Edit
Total: 27,50
Guthaben: 50,00
Direktverkauf
Bezahlen
F12



The payment window looks like this:



1. Now you select the desired payment method by placing the cursor in the corresponding field, and the amount immediately appears. The payment methods available for selection in this payment window are defined elsewhere:Payment methods
2. Set the receipt printing according to your wishes.
3. The function ***Book as invoice into the account*** is explained in the next chapter.
4. Print an interim billing without closing the payment process.
5. Here you have the option to transfer the payment to another person. You will see the following window:

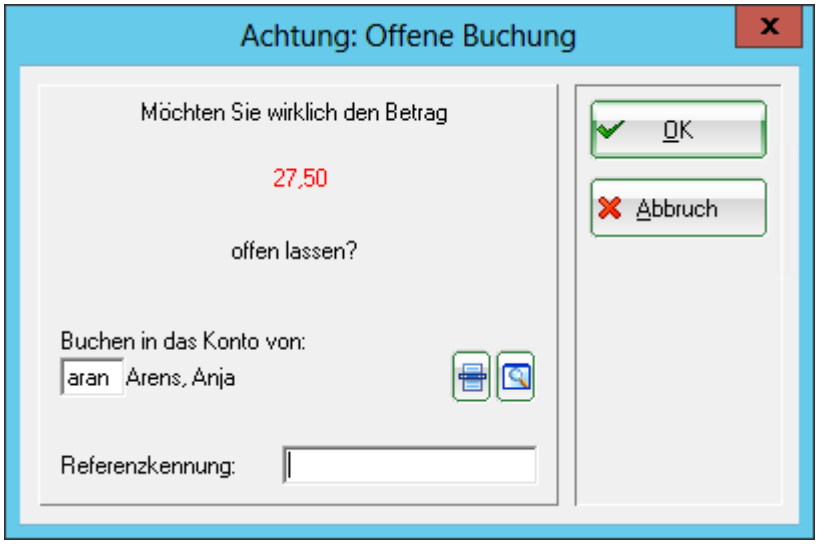


Enter the appropriate person to book the payment for this person.

Click ***OK*** to complete the payment process.

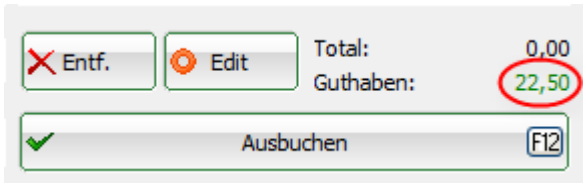
Book as invoice into the account

This function allows you to leave open postings in the accounts (OI-postings). The payment can be made later. If you click on ***Book as invoice into the account*** during the payment, you will see the following window:



Click ***OK*** to complete the booking.

If you later select this customer in the cash register, you will see the open balance in red color or a credit in green color, on the right side, above the payment button.



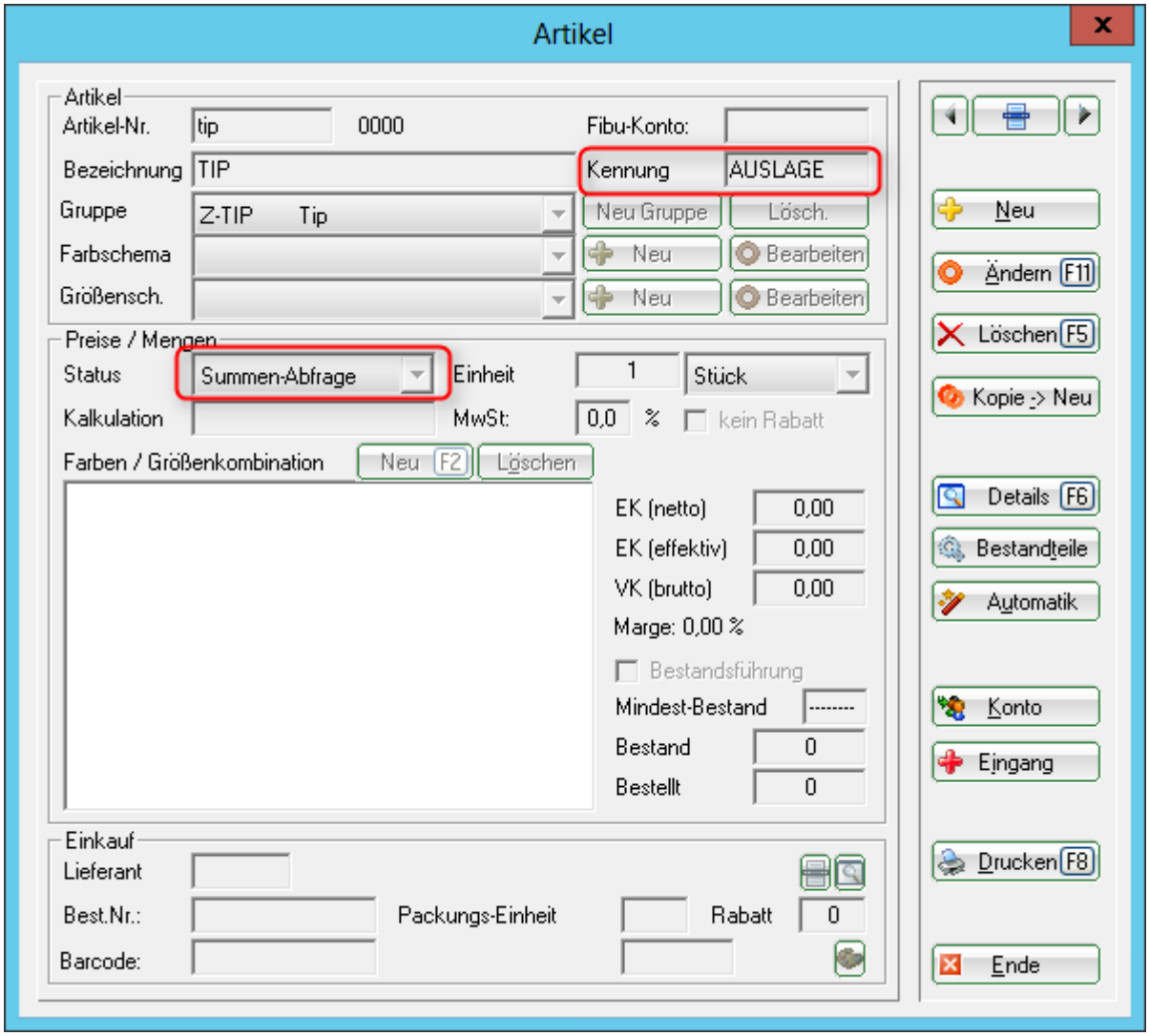
If you have a so-called OI-area set up, the booking will be automatically transferred to this area. Please contact PC CADDIE Support to set up this specific account range.

Book as tip

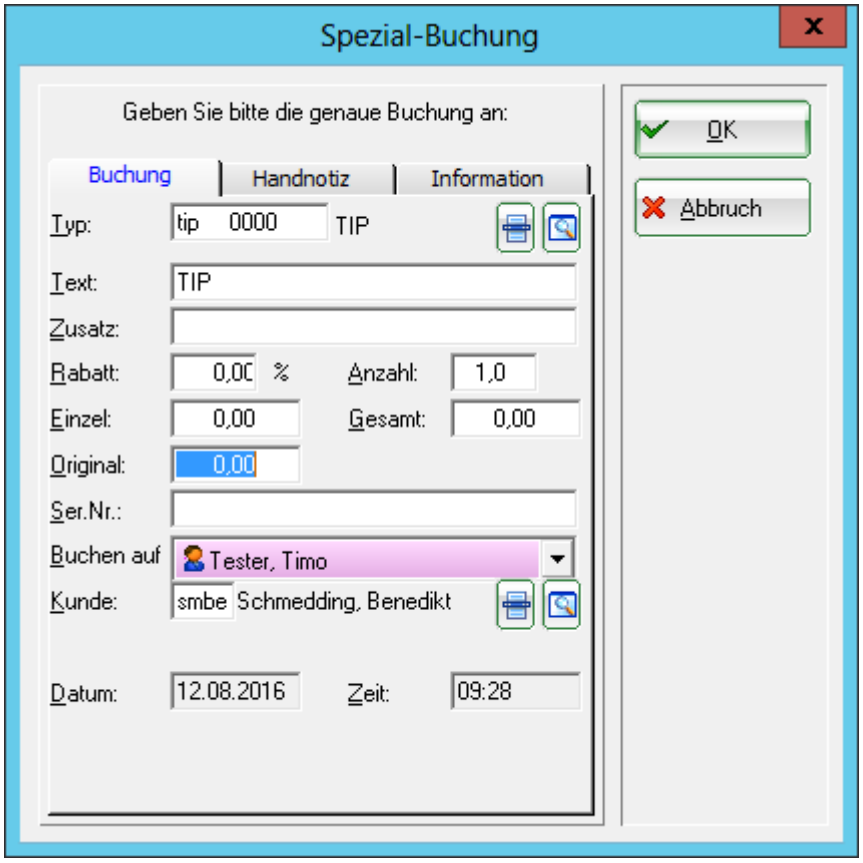
There are multiple possibilities:

1st possibility: A guest gives tip

For this you book the article (artikel) Tip in the cash register.



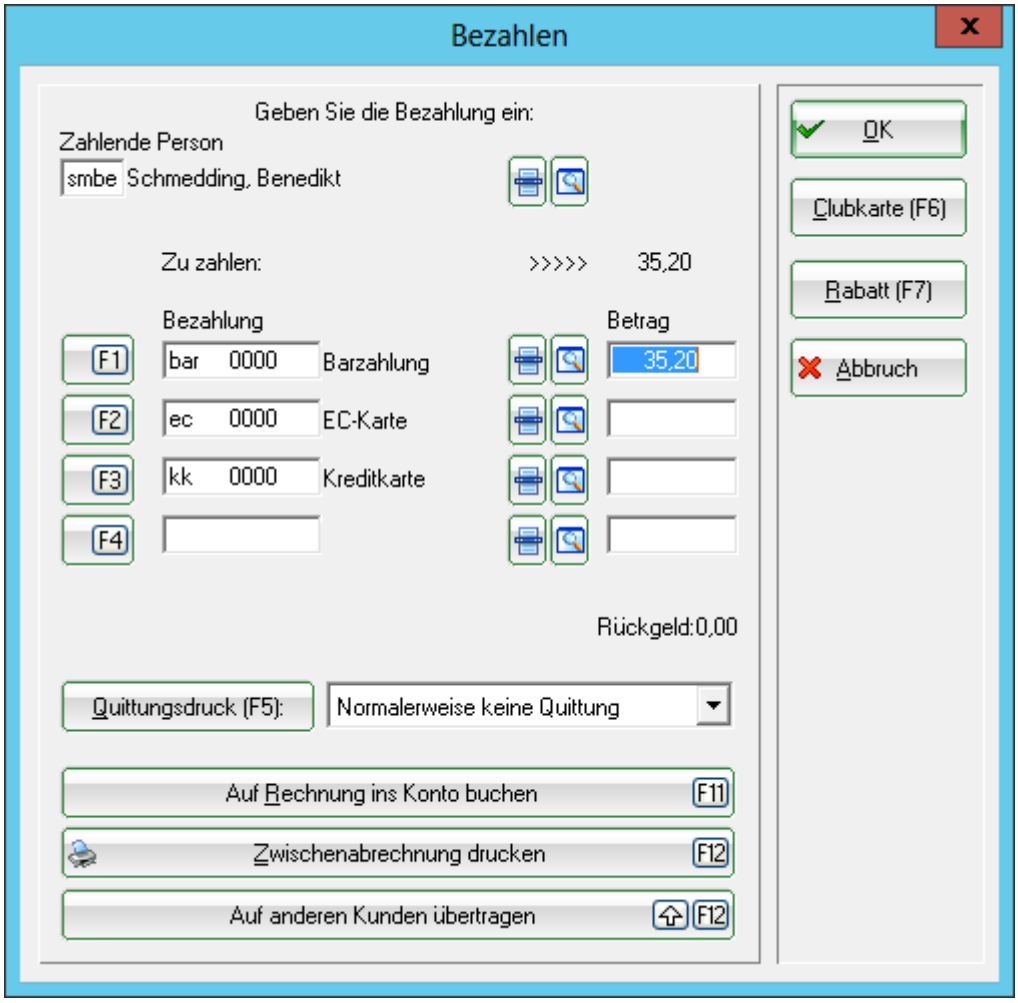
Selecting the article opens the following window:



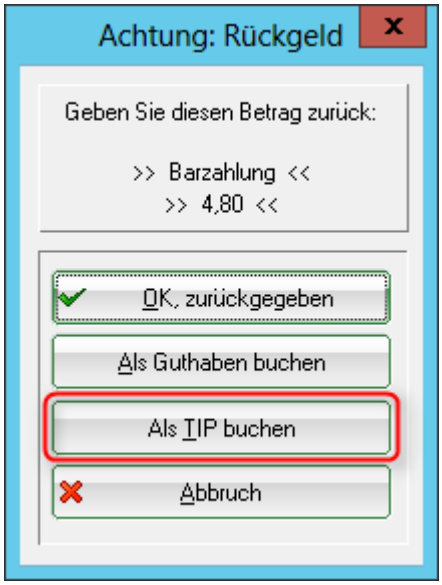
Here you enter the amount that was given as a tip, confirm with OK and then click on pay.

2nd possibility: A guest pays his bill and gives tip

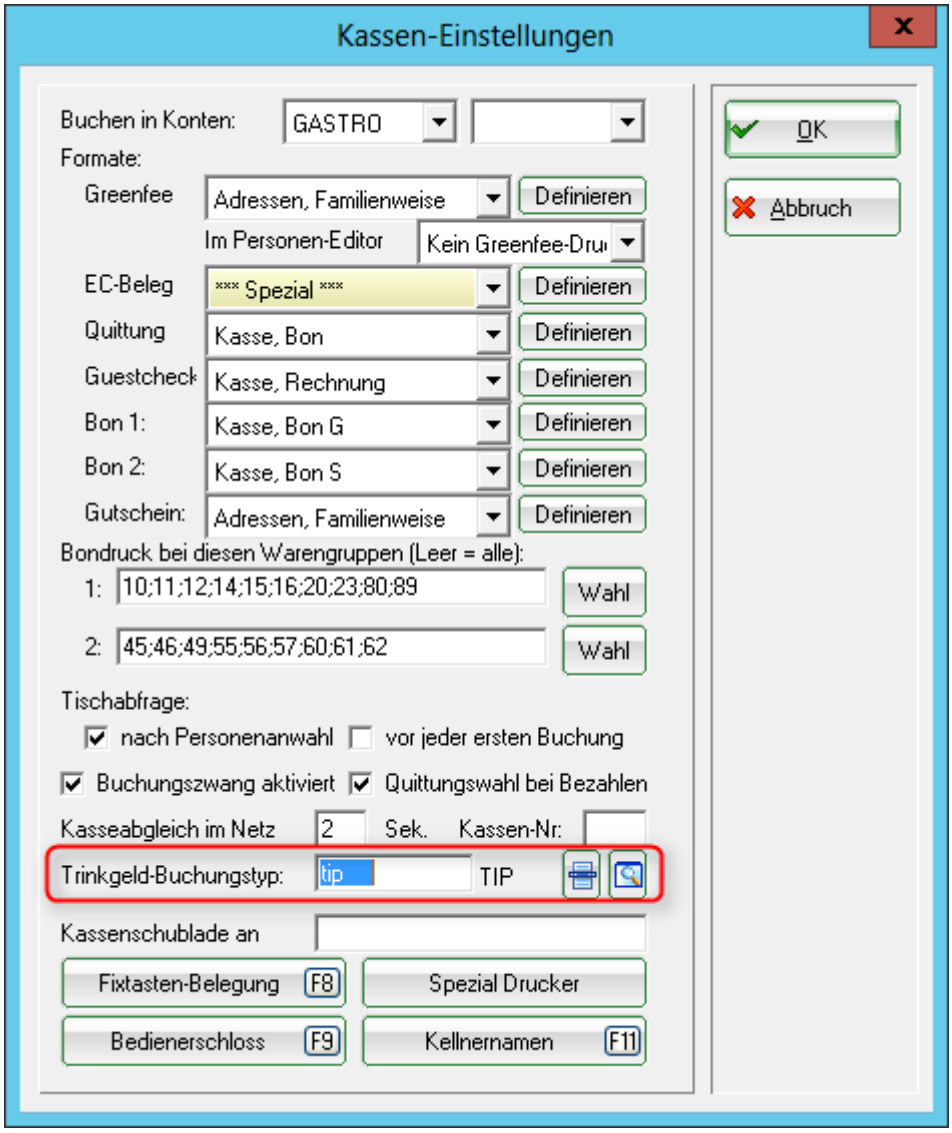
The guest has to pay 35,20 € and gives 40,00 €. Click on the button ***Pay***. The following window opens. Here you enter € 40.00.



Click Ok and then **Book tip.**



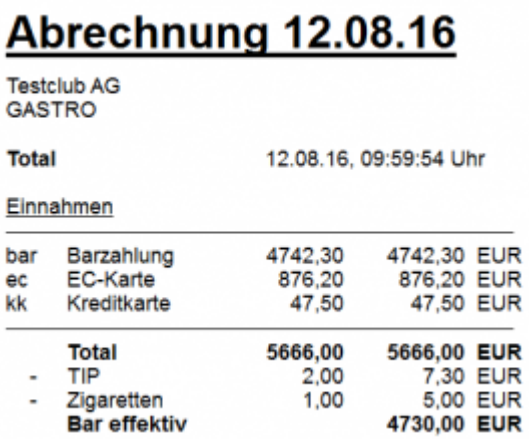
If you don't see this button, it means that the article is missing in the basic settings of the cash register. So you have to go to the default setting. 1 - Button **Administration**, 2 - Cashier Register Settings, Basic Settings, Tip Booking Type: tip (select the corresponding article).



3rd possibility: A guest still has credit in the account, for example, because of the Consumption flat rates and wants to give the credit as tip

Book item Tip in the cash register as in item 1, enter the desired amount, and then click on pay. If the amount is billed to the account, the credit will be reduced and deducted from the cash receipts as EXPENSES.

The posted tip is always displayed on the daily closing.



Abrechnung 12.08.16

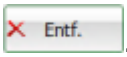
Testclub AG
GASTRO

Total 12.08.16, 09:59:54 Uhr

Einnahmen

bar	Barzahlung	4742,30	4742,30	EUR
ec	EC-Karte	876,20	876,20	EUR
kk	Kreditkarte	47,50	47,50	EUR
	Total	**5666,00**	**5666,00**	**EUR**
-	TIP	2,00	7,30	EUR
-	Zigaretten	1,00	5,00	EUR
	Bar effektiv		**4730,00**	**EUR**

Cancel article / wrong payment method selected

You can cancel an article reservation that is still in the cash register with the help of the button ***Remove*** (F5) 

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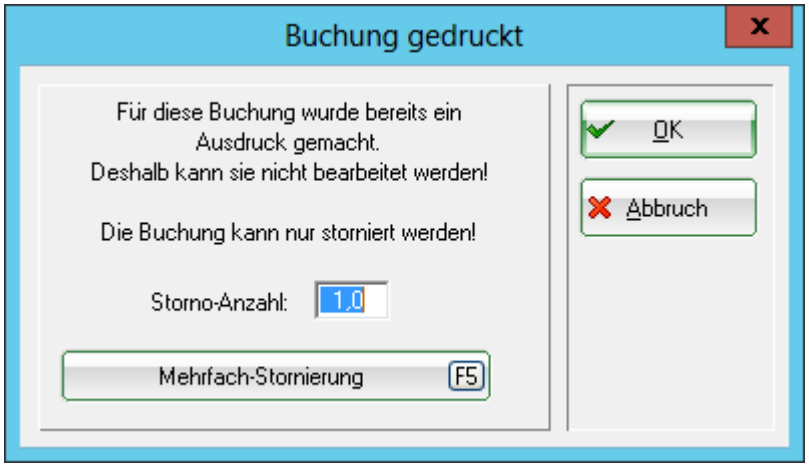
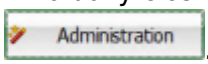
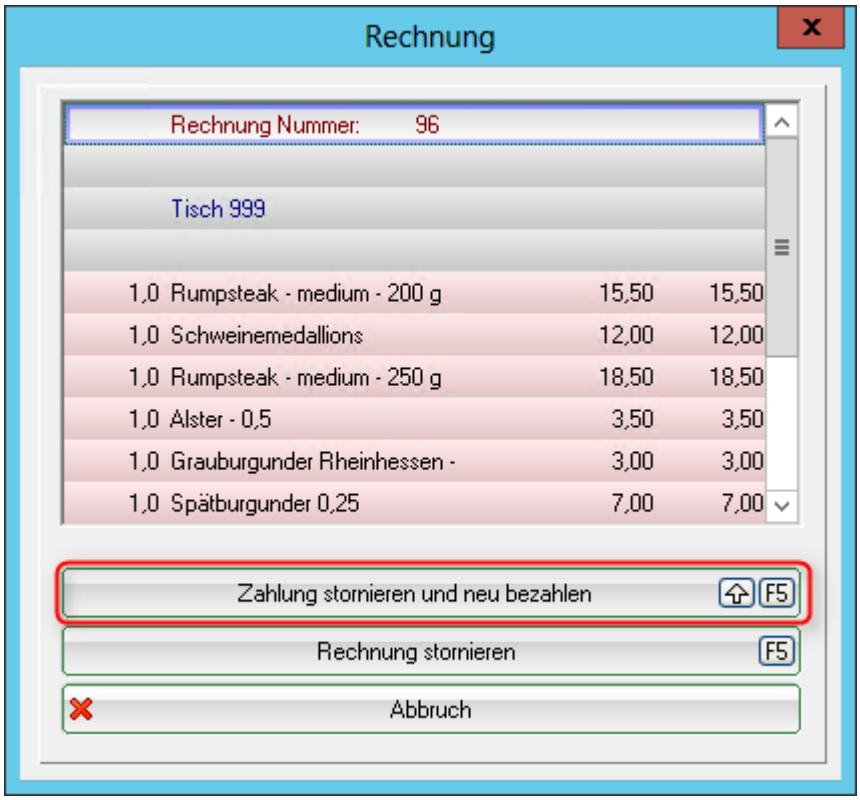
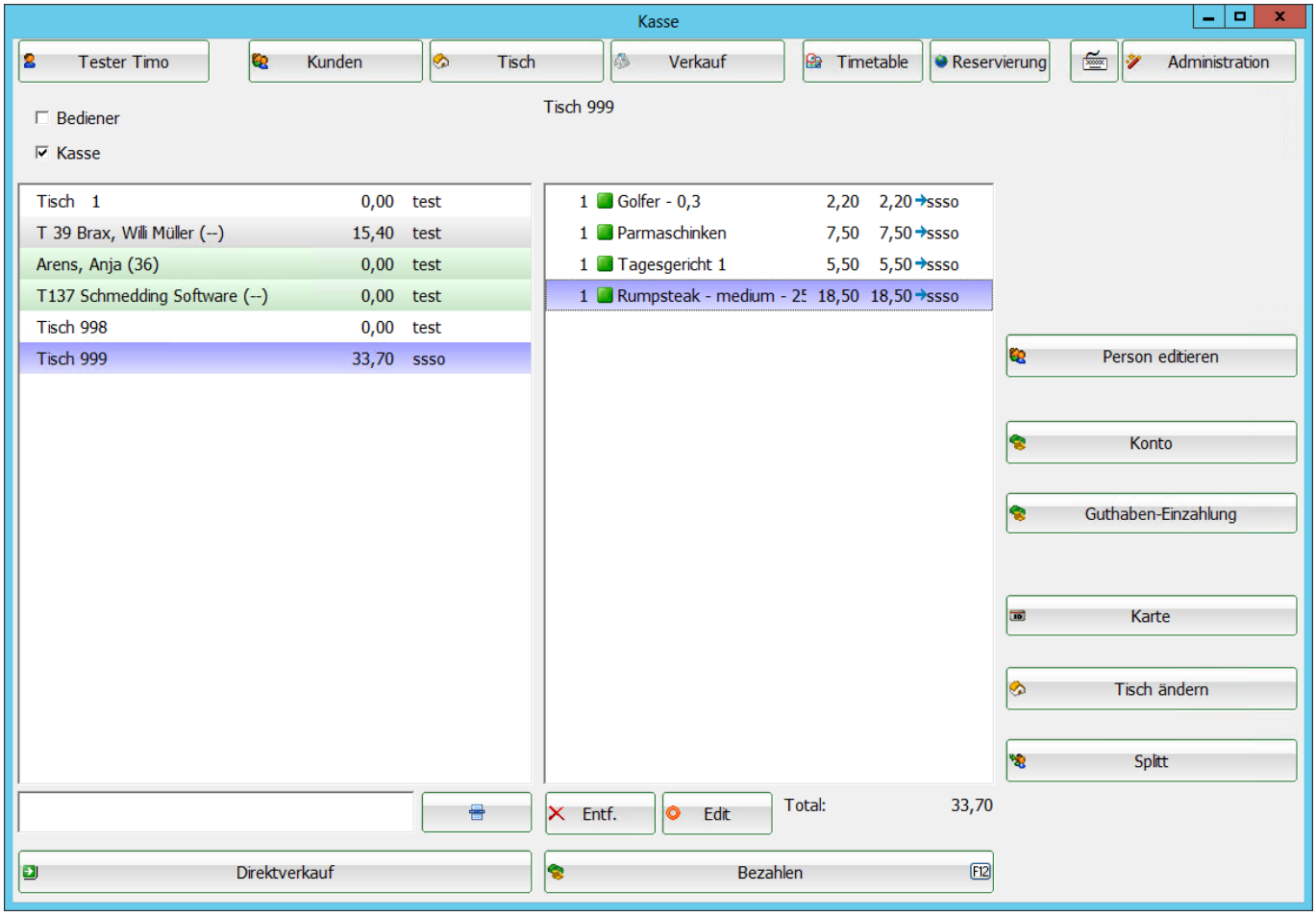


You can only nullify a completed payment by means of a cancellation transaction in the cash register, if no daily closing has been created yet. Switch to the administration level in the upper right corner 

. Select ***Repeat / Cancel***(F4). This window shows all the bookings made. Mark the booking to be canceled and click ***Cancel*** (F5), which brings you to the following selection:



The booking will be returned to the cash register for further processing after pressing ***Cancel payment and repeat the payment***.



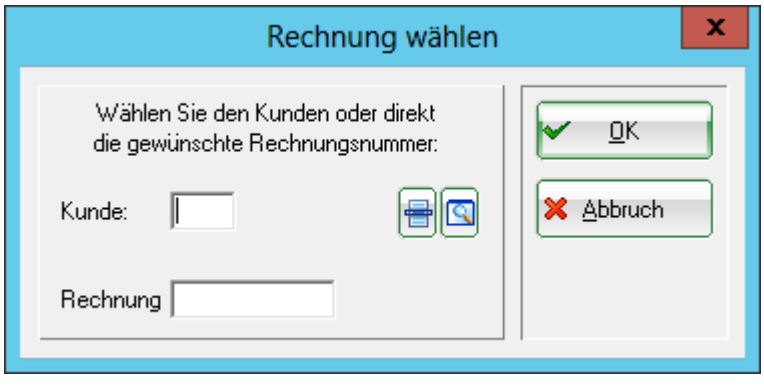
You have the option of canceling the item bookings (see above) and / or adding additional bookings.

Or if an incorrect payment method was selected, then you can start the usual payment process; the previous process is canceled.

Cancel articles after the day closing

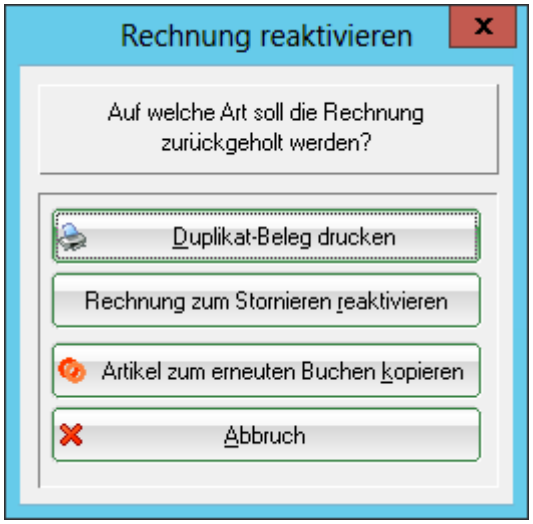
Working with the archive button

As soon as a daily closing has been completed, all processes are completed and the button ***Repeat / Cancel*** is no longer available. You can reload the bookings to the cash register by pressing ***Archive***.

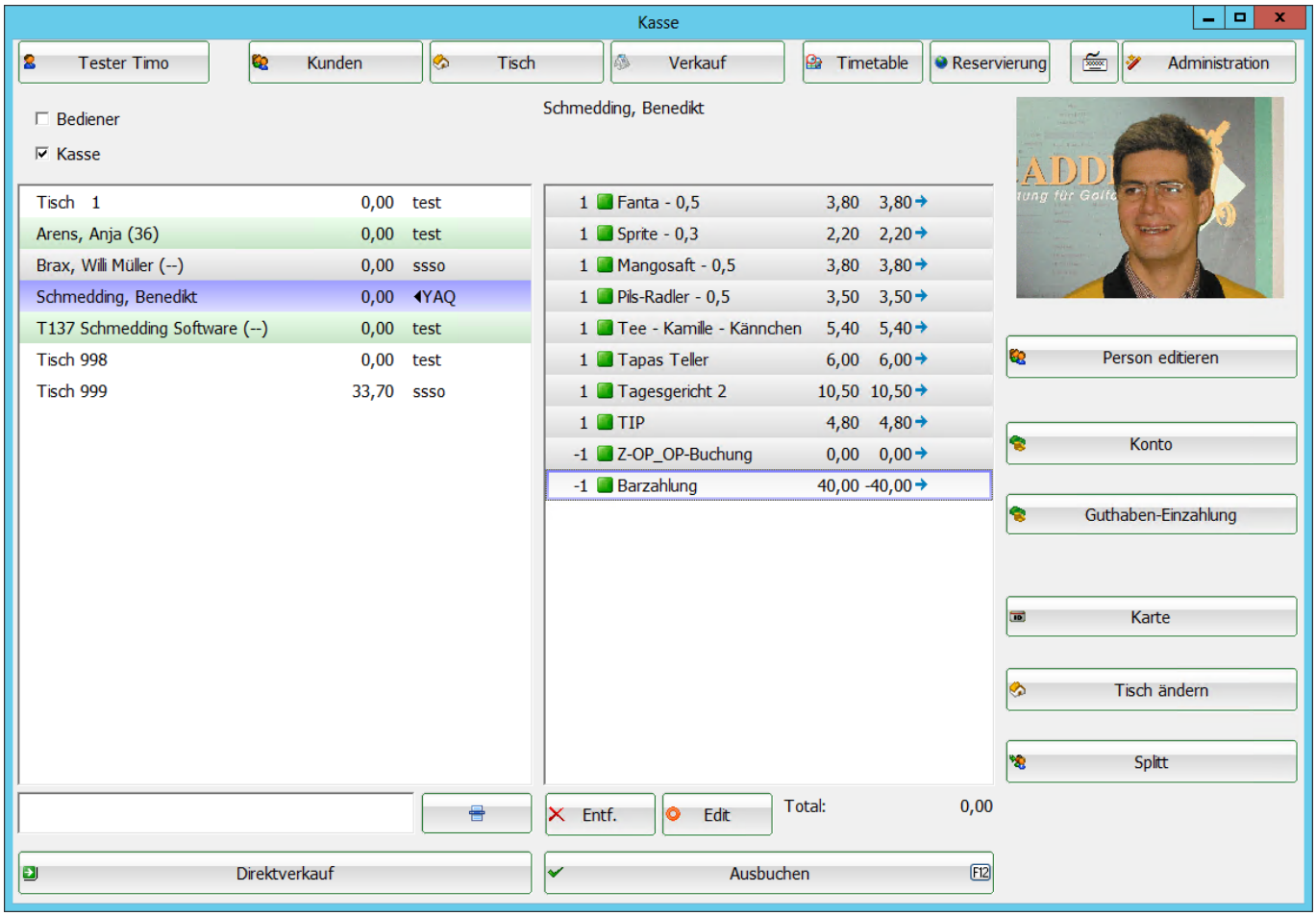


After entering the customer and the invoice number, which you have to find out in advance from the

account entries, the following window opens:

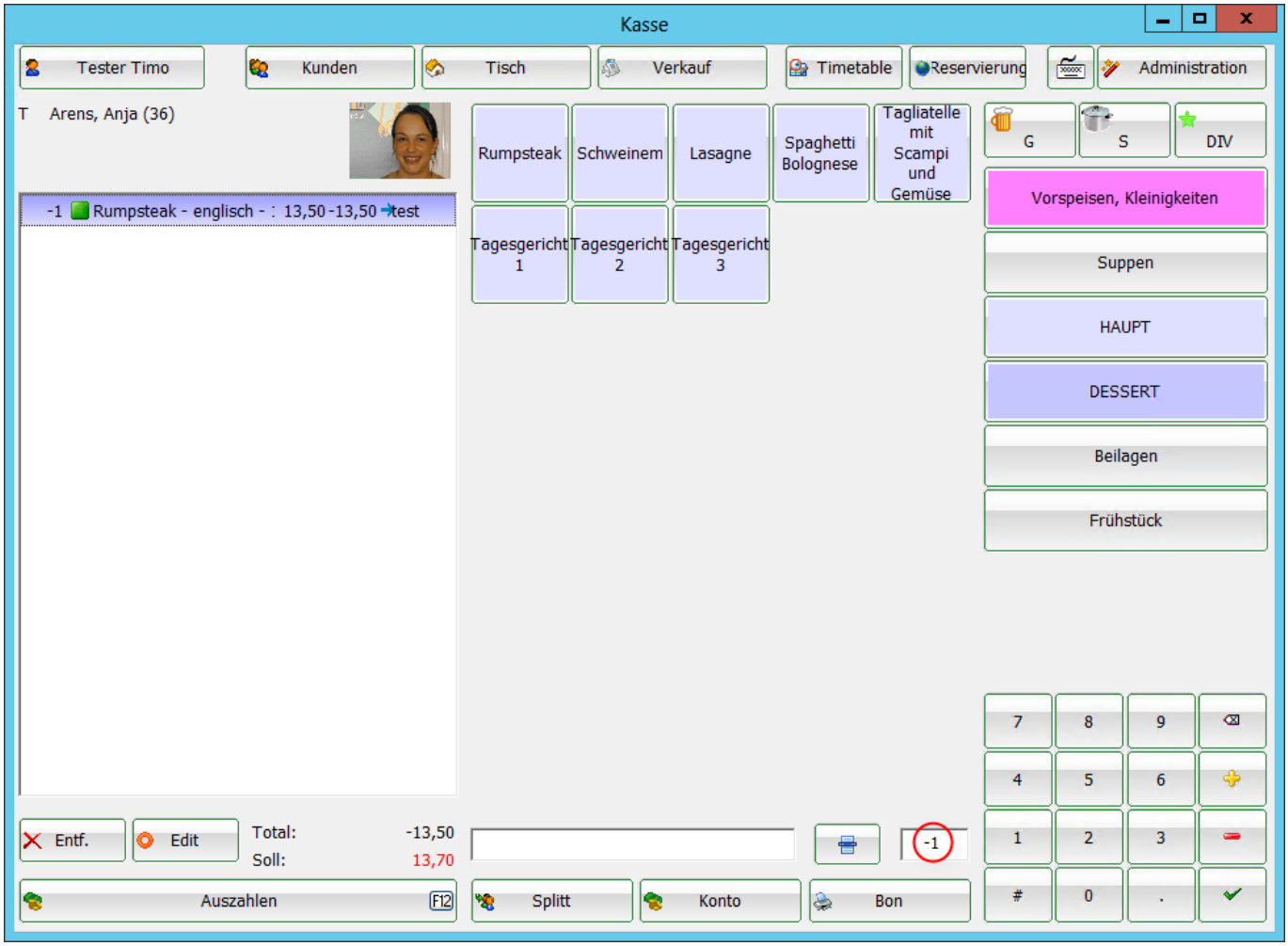


Press ***Reactivate invoice for cancellation*** to retrieve the entire booking back to the cash register. You can now cancel article postings. This is especially useful for event invoices, because you do not have to remember all the articles. The way to cancel only a few items is presented below.

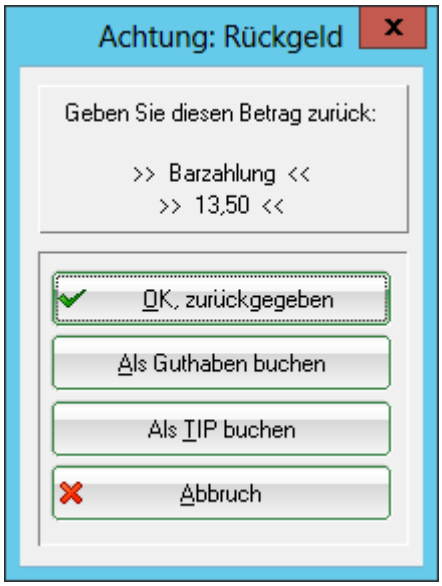


Working with minus numbers

Another cancellation option is working with the minus sign, i.e., negative numbers. Choose again the customer in the cash register, book the article that you want to correct and enter the appropriate correction number with a minus as sign in the field for the number, for example, „-1“:

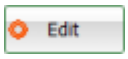


Confirm your entry with Tab or Enter. To complete the booking, select ***Pay out*** and the payment method in the payment window. Or ***Book as invoice into the account*** to get the following option:

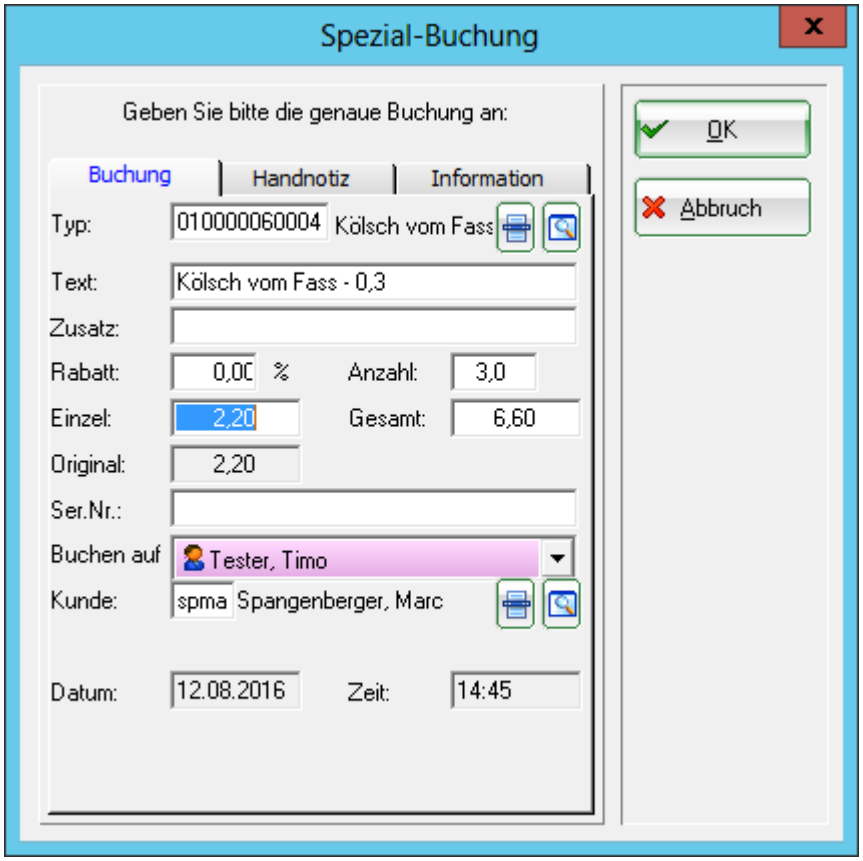


Book as credit means the customer's account is credited with this amount.

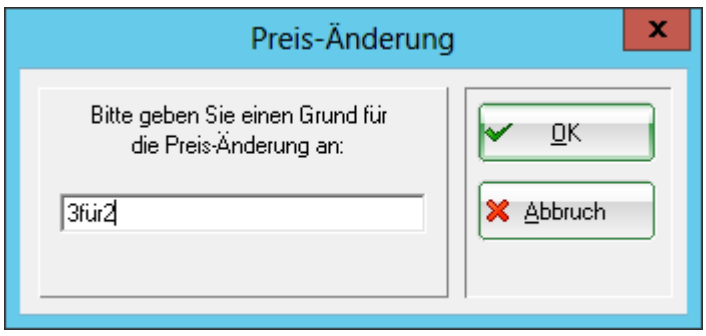
Make a discount

You can use the button ***Edit*** (F7) 

to change the article for a booking, as long as the receipt has not been issued.

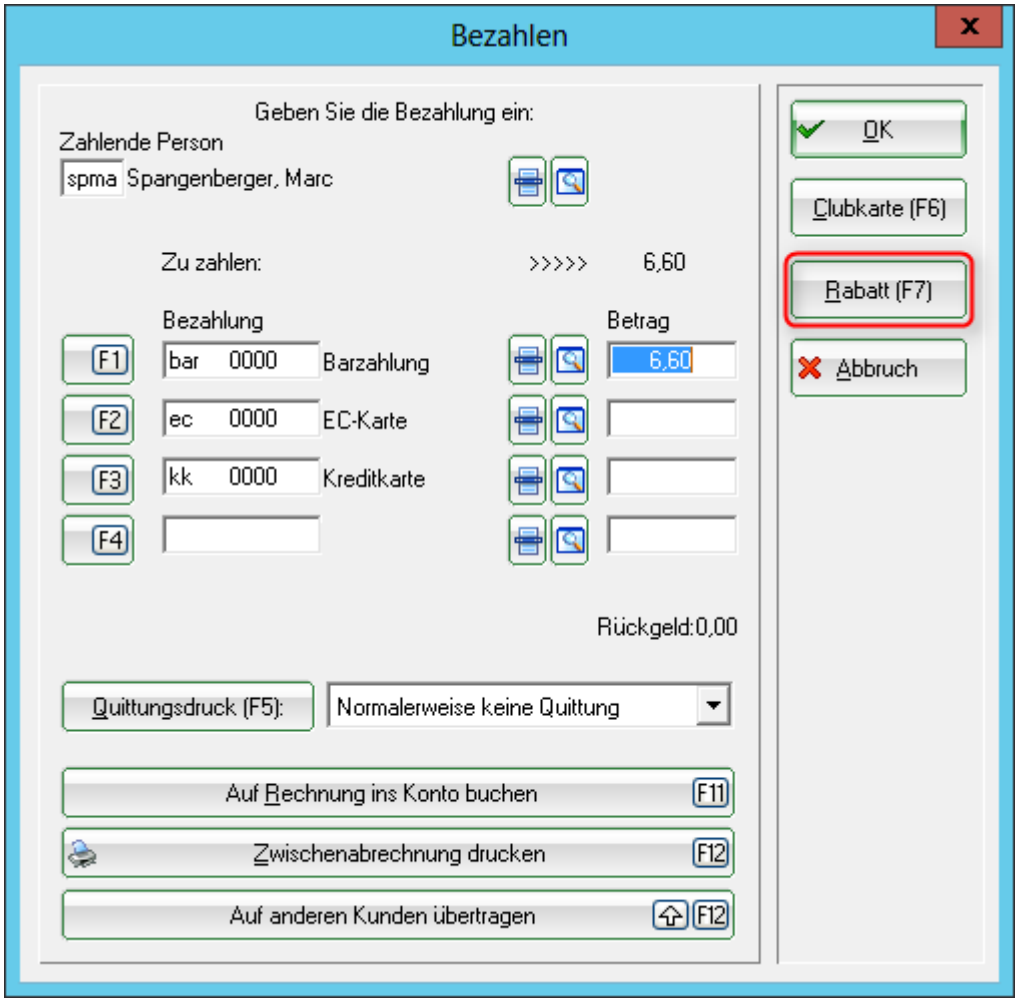


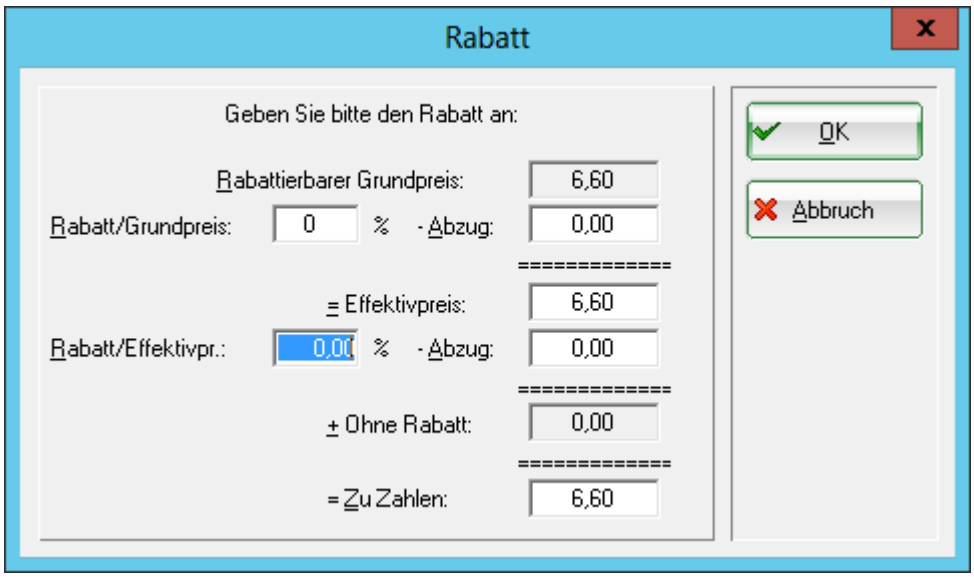
You can now enter a discount percentage, like 10% discount. Or change the unit price, for example make it 20 cents cheaper. Or you can also change the total price if you want to reduce the price if a certain amount or items have been bought. PC CADDIE asks for a reason for the price change after you press ***OK***:



This will be displayed on your receipt. You will see the new item price in the cash register.

If the item is already booked or the guest gets a total discount of 10% on everything, select the button ***Discount*** when the payment is made.



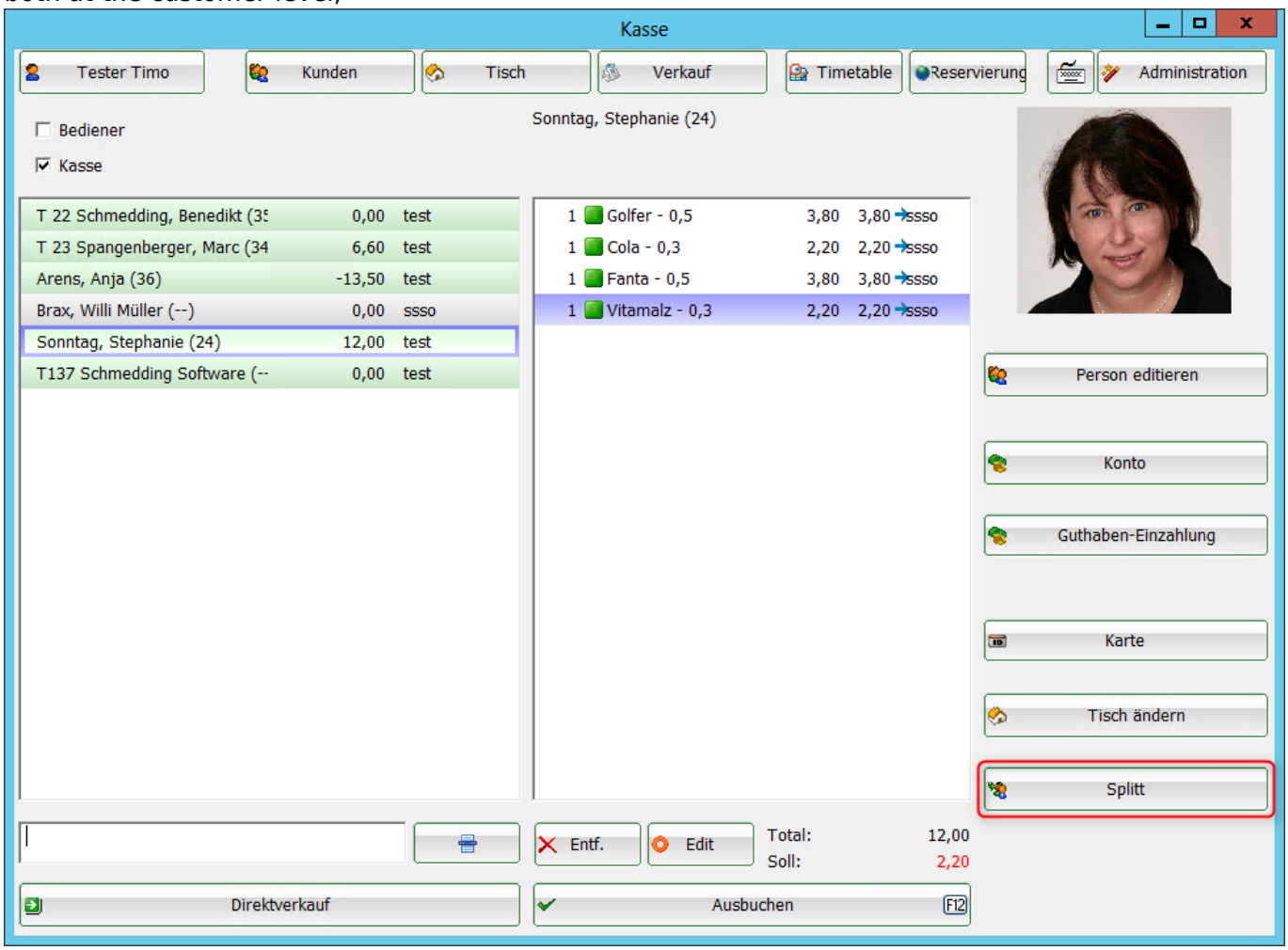


The amount to be paid is calculated automatically when you enter the discounts. Press ***OK*** to complete the booking.

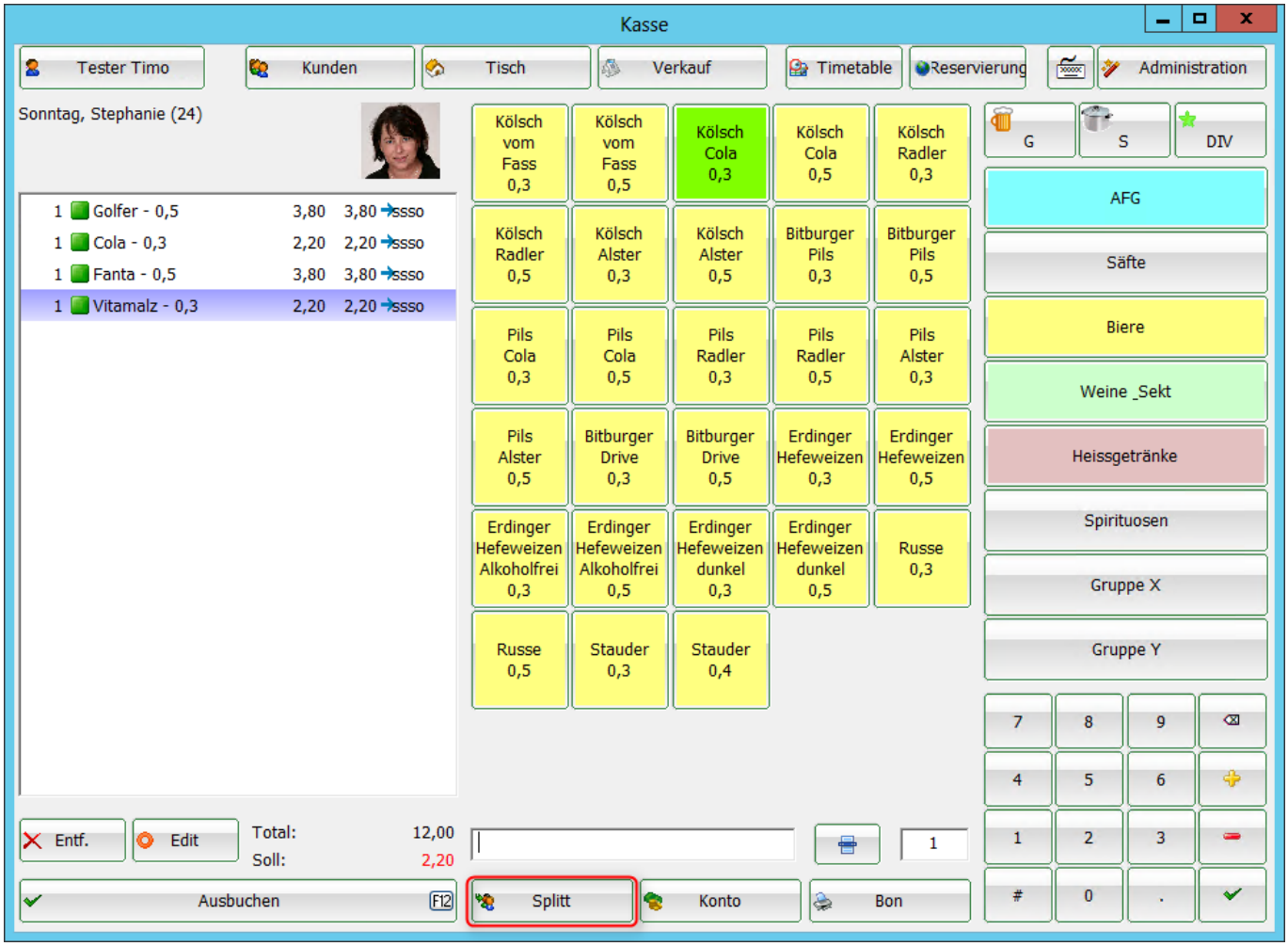
Split function

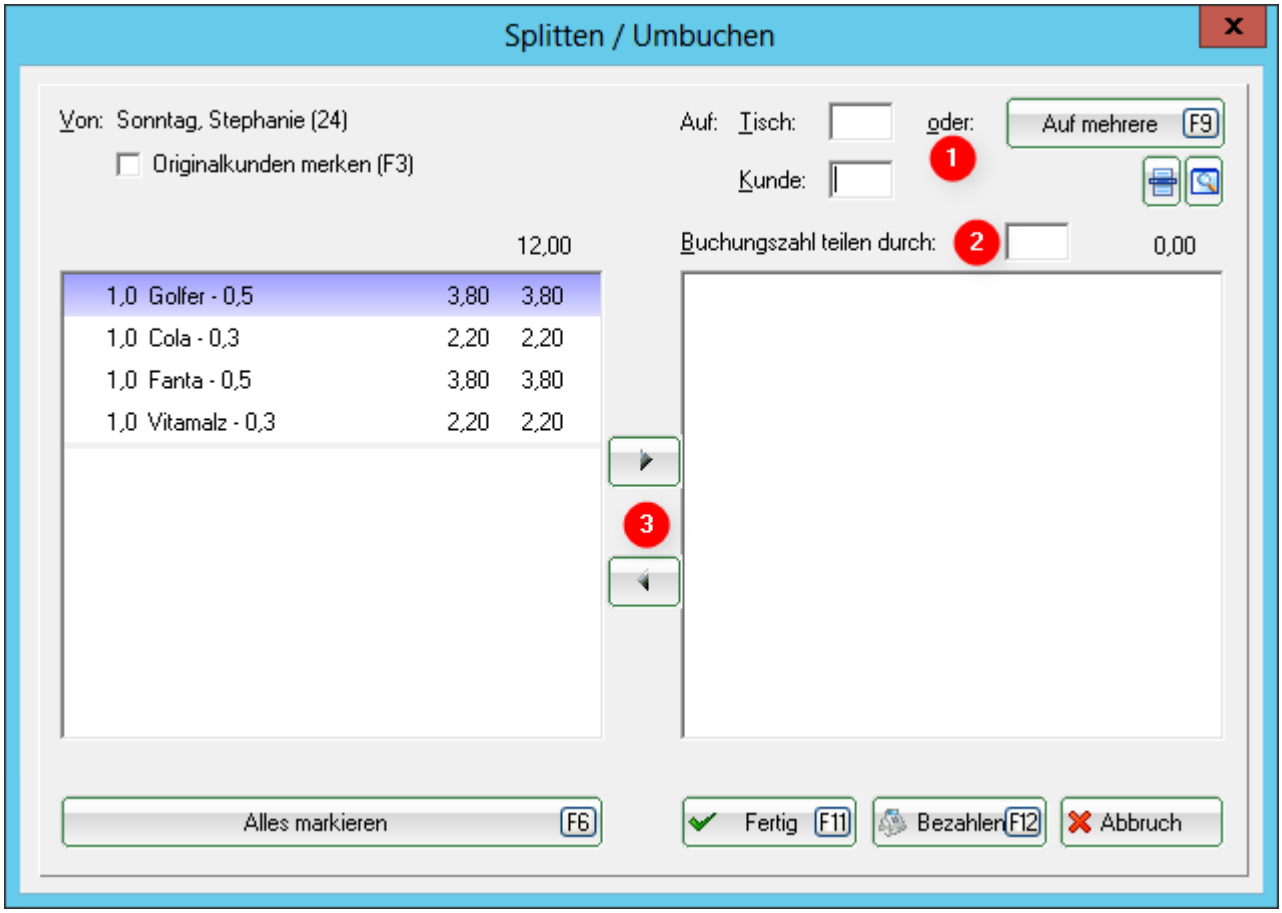
In restaurants, it often happens that all orders are first booked on a person or a table, and later split when paying. For doing this, use the ***Split***(F6) button in the gastronomy cash register. You have it

both at the customer level,



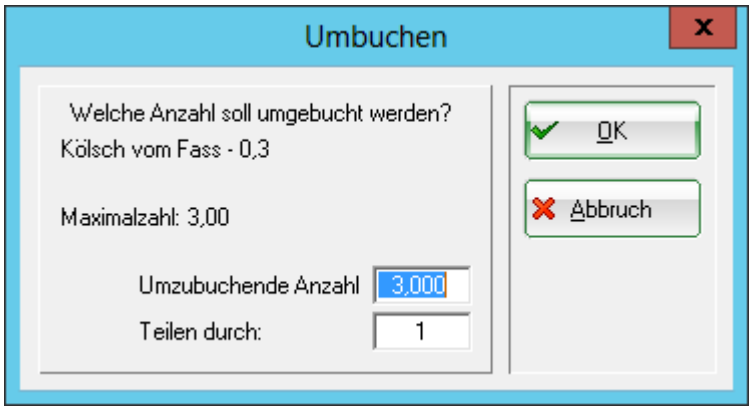
as well as at the sales level.


Kasse
Tester Timo
Kunden
Tisch
Verkauf
Timetable
Reservierung
Administration
Sonntag, Stephanie (24)
1 Golfer - 0,5 3,80 3,80 ssso
1 Cola - 0,3 2,20 2,20 ssso
1 Fanta - 0,5 3,80 3,80 ssso
1 Vitamalz - 0,3 2,20 2,20 ssso
Kölsch vom Fass 0,3
Kölsch vom Fass 0,5
Kölsch Cola 0,3
Kölsch Cola 0,5
Kölsch Radler 0,3
Kölsch Radler 0,5
Kölsch Alster 0,3
Kölsch Alster 0,5
Bitburger Pils 0,3
Bitburger Pils 0,5
Pils Cola 0,3
Pils Cola 0,5
Pils Radler 0,3
Pils Radler 0,5
Pils Alster 0,3
Pils Alster 0,5
Bitburger Drive 0,3
Bitburger Drive 0,5
Erdinger Hefeweizen 0,3
Erdinger Hefeweizen 0,5
Erdinger Hefeweizen Alkoholfrei 0,3
Erdinger Hefeweizen Alkoholfrei 0,5
Erdinger Hefeweizen dunkel 0,3
Erdinger Hefeweizen dunkel 0,5
Russe 0,3
Russe 0,5
Stauder 0,3
Stauder 0,4
G
S
DIV
AFG
Säfte
Biere
Weine _Sekt
Heissgetränke
Spirituosen
Gruppe X
Gruppe Y
Entf.
Edit
Total: 12,00
Soll: 2,20
Ausbuchen F12
Splitt
Konto
Bon


Splitten / Umbuchen
Von: Sonntag, Stephanie (24)
Originalkunden merken (F3)
Auf: Tisch:
Kunde:
oder:
Auf mehrere F9
12,00
Buchungszahl teilen durch:
0,00
1,0 Golfer - 0,5 3,80 3,80
1,0 Cola - 0,3 2,20 2,20
1,0 Fanta - 0,5 3,80 3,80
1,0 Vitamalz - 0,3 2,20 2,20
Alles markieren F6
Fertig F11
Bezahlen F12
Abbruch

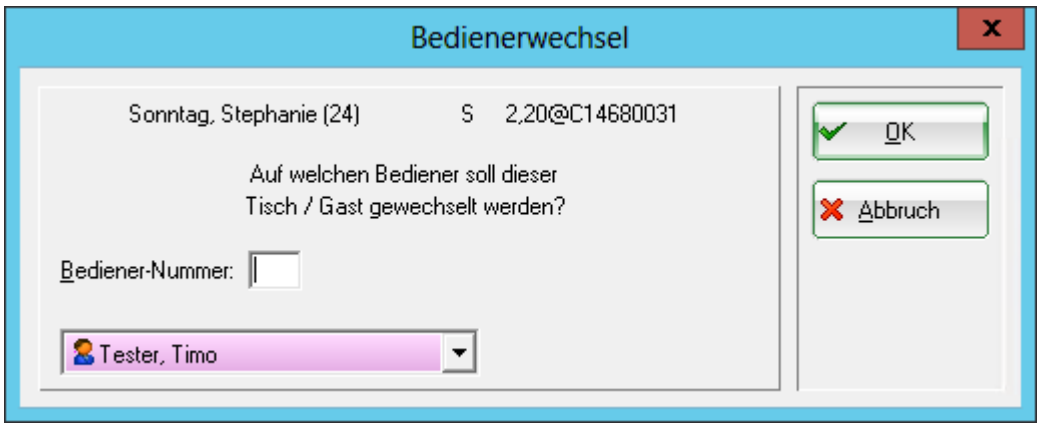
1. Select a table number, a customer, or use the button ***To several*** for the persons already registered in the cash register
2. You can now divide the total amount by a certain number
3. or use the arrow keys to transfer the desired items to the previously selected customer or table

A query window opens in which PC CADDIE asks what number you want to repost or divide, in case there are two or more articles.



Transfer open tables or guests to another operator

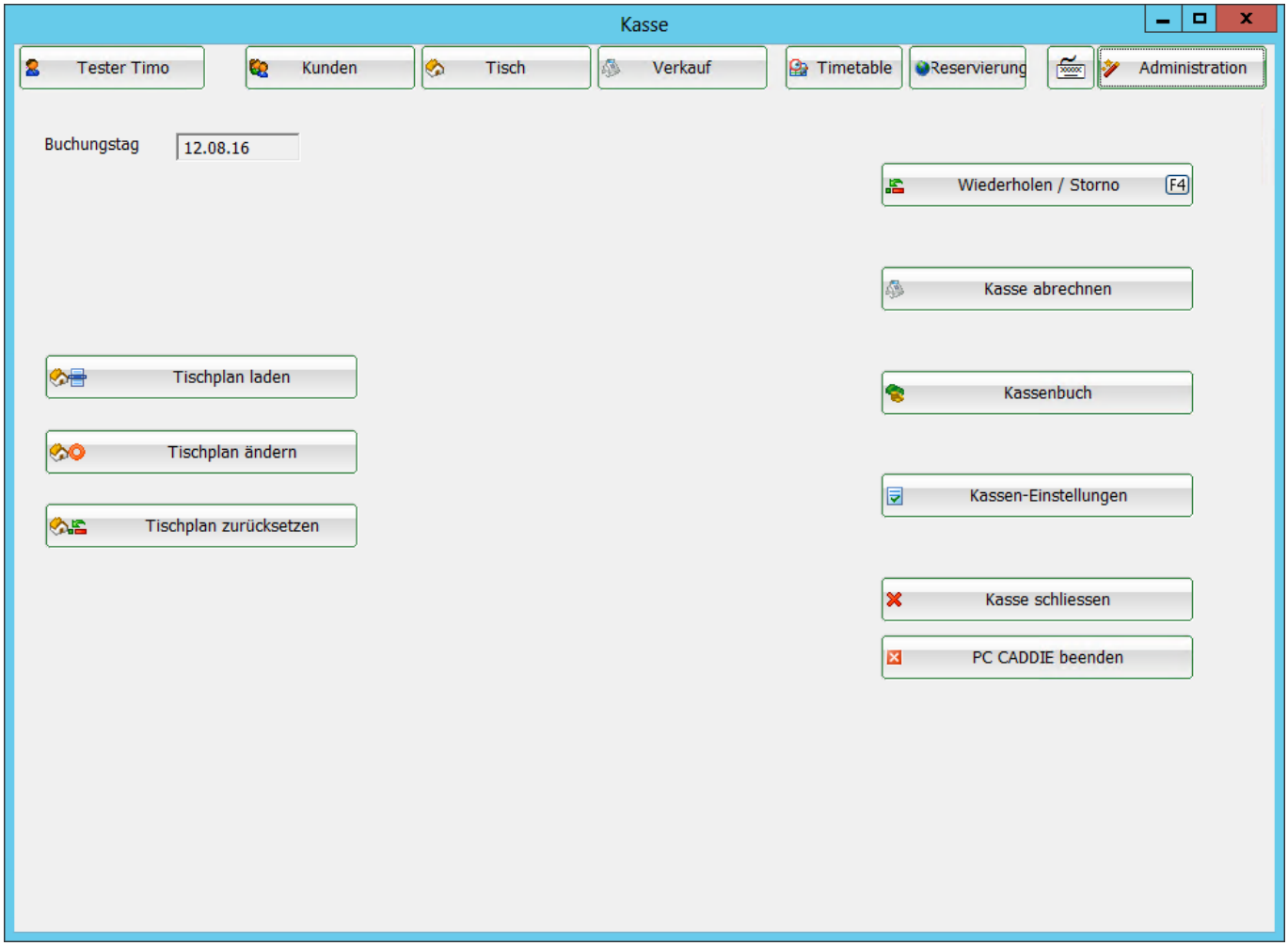
You have the option of transferring your open tables or customers to another operator for a change of shift or after-work hours. Mark the table to be transferred and simultaneously press the **SHIFT** and **F9** keys on your keyboard.



Then select the operator to which you want to transfer it. Repeat this with each table that is still open.

Administration level

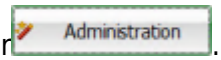
Some functions/buttons can be disabled depending on user rights.



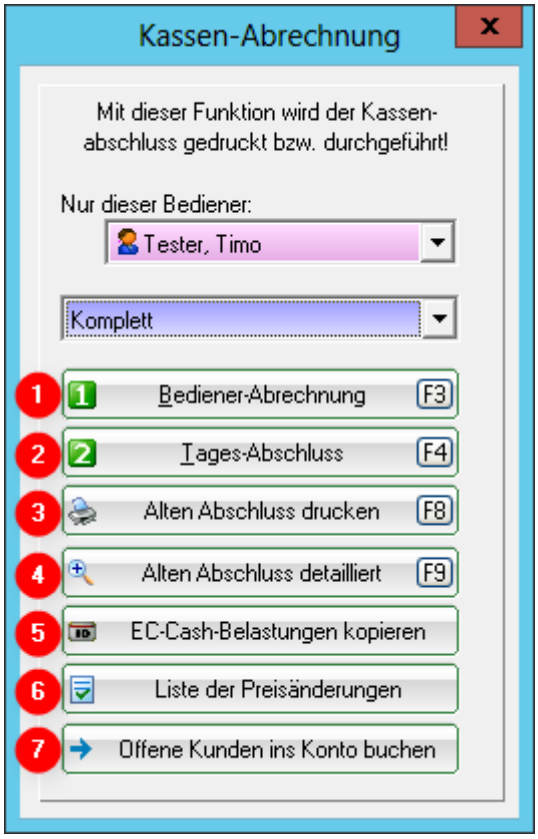
Here you can change your table plan, for example, to move your tables to their current position.

You will also find the accesses to the functions Repeat / Cancel, Cash-Out, Cash book, Cash register settings, Close cash register and Exit PC CADDIE.

Operator billing and daily closing

Switch to the administration level in the upper right corner 

. Select **Cash balance**:



1. Operator billing
2. End of the day
3. Print old degree
4. Old financial statements in detail
5. Copy EC-Cash debits
6. List of price changes
7. Post open customers to the account

Working with the cash book

Press ***Cash book*** in the administration level to open the Cash book.

Open items booking

Open item postings

Edit quick selection

Quick selection