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CLOCKING IN/LOGGING IN

1. From the log in screen, type your four digit PIN. The first time you log in each day will also clock you in for your shift. You should have created this PIN during the Setup Wizard sent to you via email. For additional assistance, please contact Technical Support at 800-201-0461.

LOGGING OUT

1. Select the user name in the top right corner of the ticket screen.
2. Choose Logout/Exit from the drop down menu.

Note: Logging out will not clock you out of your shift. You must go to your Shift Report to clock out.
CALCULATOR, ECR AND POS MODE

You can switch between ECR or POS Mode at any time by selecting the corresponding button at the top of the screen.

ECR Mode
This mode can be used to list items on the screen with a calculator displayed for entering prices of items not listed in the system. This view mimics a traditional cash register.

POS Mode
This mode organizes your items by Departments and Item Tags for easy searching. It is ideal for businesses with a large number of items or different departments.

ECR Mode
To begin a transaction in ECR Mode, select an item from the right side of the order screen, scan an item’s barcode, or enter a dollar amount on the calculator. This will automatically create a new ticket and you can continue adding items.

POS Mode
To begin a transaction in POS mode, select an item from the right side of the order screen or scan an item’s barcode. This will automatically create a new ticket and you can continue adding items.

Calculator Mode
Calculator mode will be shown by default if the departments and items modules are not activated on the system.

BEGINNING A TRANSACTION

Calculator Mode
To begin a transaction in Calculator Mode, enter a dollar amount on the calculator that corresponds to the price of each item being purchased. Press the + button after each item price to add it to the ticket.

ECR Mode
To begin a transaction in ECR Mode, select an item from the right side of the order screen, scan an item’s barcode, or enter a dollar amount on the calculator. This will automatically create a new ticket and you can continue adding items.

POS Mode
To begin a transaction in POS mode, select an item from the right side of the order screen or scan an item’s barcode. This will automatically create a new ticket and you can continue adding items.
ITEM FUNCTIONS

To access the Item Functions below, select an item from the ticket.

By selecting an item on the ticket, the item management functions will appear.

- Quantity: This function will allow you to modify the quantity of the selected item.
- Special Request: This function allows you to enter custom requests for the kitchen.
- Remove Item: This function will allow you to remove the selected item from the ticket.
- Cancel: This function allows you to cancel the current changes and return to the ticket screen.
- Change Price: This function allows you to change the price of the selected item.
- Discount Item: This function will list all available discounts that apply to the selected items.

If there are Modifier Sets assigned to an item they will be listed on this page. You will be unable to leave this page until you have selected any required modifiers.

TICKET FUNCTIONS

- RECALL: This function opens the ticket function screen.
- PRINT: This function prints the currently selected ticket.
- VOID: This function voids the currently selected ticket. If the ticket was previously paid, a void slip will print in the kitchen.
- SEARCH: Search options are available at the top of the screen. Held or completed transactions can be filtered as well as date ranges. Select “Open” to re-open the selected ticket.

DISCOUNT TICKET

This function will prompt to select a discount that applies to the entire ticket.

HOLD TICKET

The “Hold” function parks the transaction for recalling at a later time.
Note: Holding a ticket does not automatically send the order to the kitchen. This must be done manually on the Recall screen.
1. The most common increments for cash payment will be displayed at the bottom of the ticket. These quick pay options will include exact change as well as the closest amount if paid in singles, fives, tens, or twenties. Selecting one of these options will finalize the transaction and display the change due. This method is commonly used for counter-based transactions.

2. Alternatively, you can select “Pay” on the bottom of the ticket.

3. On the payment screen, shortcuts are available on the left and right sides of the number pad. The shortcuts or the number pad can be used to enter an amount if using multiple tender types. Otherwise, selecting the tender type without an amount will enter the exact amount.

4. If “Credit” is selected, the system will prompt to enter a credit card number. Swipe the card or if necessary the credit card number can be manually entered using the attached keyboard.

5. “Force Authorization” allows you to enter transactions taken while offline. The credit card information can be manually entered using the keyboard. You will need to enter an Authorization Code.

6. If signature screen is enabled, the system will prompt to enter the tip amount after the credit card information is entered.
PAYMENT OPTIONS  (CONTINUED)

7. If enabled, an option will be available for the customer to sign directly on the touchscreen for credit card transactions. The Harbortouch Echo station has a release button on the base that will allow the screen to swivel 180 degrees to face the customer and lock into place so that they can sign the screen.

REFUNDING A SALE

1. To refund a ticket, go to Recall on the order screen, and then choose “Complete Sales” at the top of the screen.

2. Choose your desired transaction, and then click the “Refund” button in the lower left corner.

3. Once you have chosen which transaction to refund, you will see a dialog box with the amount. You will have the option to complete a full or partial refund.

4. For a full refund, you will need to give a reason (and confirm it) and it will refund the money onto the tendered payment type.

Note: You may need to enter a manager PIN if you do not have the proper permissions to void/refund a transaction.

5. For a partial refund, you will need to choose which items from the ticket you would like you refund. You can do this by selecting the items on the left of the screen.

6. After making your selection and choosing to refund, you will then be able to choose how the customer will have their refund tendered.

Note: You may need to enter a manager PIN if you do not have the proper permissions to void/refund a transaction.

To Perform an Open Refund (not associated with a particular purchase):

1. Choose “Open Refund” from the manager dropdown menu on the order screen.

2. Enter the amount you would like to refund to the customer and press “Refund”.

REFUNDING A SALE  (CONTINUED)
3. On the next screen, verify that the amount is correct and hit “Refund” again.
4. On the final payment screen, press “Cash / Credit” and then either provide the customer with the appropriate cash amount or swipe their credit card to refund the amount to their card.

CUSTOMER DATABASE

1. If the Customer Database module is activated, press “Customer” at the top of the ticket screen to open your customer database.

2. You may select a customer or search for a customer using any information you have stored (i.e. name, phone number, address).

3. To create a new customer, the only information required is a name, but it is recommended to enter at least a phone number as well to provide a unique identifier for the customer. You can also swipe a gift card while this screen is open to assign the card to the customer.

GIFT CARDS

The gift card dropdown menu is found on the bottom of the order screen.

ISSUING OR RELOADING A GIFT CARD

1. To issue a gift card, choose “Issue Gift Card” from the gift card dropdown menu.
2. Enter the desired value to add to the card.
3. Swipe the gift card through the card reader or manually key in the card number.
4. Press “Issue”.

REDEEMING A GIFT CARD

1. Press “Pay” at the bottom of the order screen.
2. Select “Gift Card” from the payment screen and then either swipe the card or enter the number manually.
GIFT CARDS (CONTINUED)

CHECKING A GIFT CARD BALANCE
1. To check the balance, choose “Check Balance” from the gift card dropdown menu.
2. Swipe the gift card through the card reader or manually key in the card number.
3. Press “Check Balance” to show the amount.

SHIFT REPORT/CLOCKING OUT

1. Choose “Shift Report” from the user dropdown on the main order screen.
2. From the Shift Report screen, you will be able to clock out as well as report your breaks, cash tips, and view your shift report.

ENABLING/DISABLING MODULES

Each module can be activated using the option available at the top of the respective settings screen. Once deactivated, all functions associated with the module will be hidden from the interface.

ACCESSING THE MANAGER SCREEN

The manager screen allows you to change settings in the system and access reports. You can only access the manager screen if you are signed into the system as a manager.

1. To access the manager screen, select “Manager” at the top of the order screen, and then select “Settings” from the dropdown menu.
2. Each option on the manager screen includes an explanation. Select the appropriate option.

EMPLOYEE FUNCTIONS

MANAGER FUNCTIONS
1. Select “Manager > End of Day” from the ticket screen.

2. Count all of the cash in your drawer and enter the amount into the Cash Count field.

3. If using any custom tender types, verify that the amount listed for that tender is the correct amount. Once you have confirmed the correct amount is entered, press “Save”.

4. Alternatively, you can use the Bill Calculator to input how many pennies, nickels, dimes, etc. you have in your drawer.

5. Press “Save” once completed.

6. Select “Adjust Tips”.

7. Select each transaction to adjust the tip if necessary.

8. Enter the amount and then select “Add Tip”.

9. Highlight any transaction you need to adjust. If a tip is missing, it will say “Enter Tip” in blue.

10. When all transactions have been reviewed, select “Finalize All”. If any transactions have not been adjusted, a warning will display.
TIME MANAGEMENT

1. Select “Timeclock” from the manager dropdown menu.

2. If you have the appropriate permissions, you can view, print, edit, or delete shifts from this screen.

3. Adding a shift will allow you to create a new shift for any employee. You will be able to include a clock in, clock out, and break times as well as assign a job, and add any cash tips.

4. You can also edit, delete, print, or view a shift from this screen.

END OF DAY PROCESS (CONTINUED)

11. Select “Back” to return to the End of Day screen.

12. You can print your X-Report at this time by selecting the button at the bottom right of the screen.

13. Each station can be finalized independently by selecting the left and right arrows and then selecting “Close Register”.

14. A message will be displayed requesting confirmation. Select “OK” to confirm.
1. From the manager screen, select “Employees”.

2. Select “Job Setup” on the left.

3. Select “Add New” to create a job type, or select an existing job type from the left to make modifications.

4. Customize the job using the settings on the right.

5. Jobs allow customization based on the job role being performed during a shift.

6. To select which functions the job can access, press “Permissions” and then highlight each of the permissions you would like that job to have.

7. Each function on the POS can be turned on or off for each particular job.

8. Press “Save” when complete.

1. From the manager screen, select “Employees”.

2. Select “Employee Setup”.

3. You will see additional configuration options for your employees on the right.

2. Select “Employee Setup”.

3. You will see additional configuration options for your employees on the right.
CREATING/EDITING EMPLOYEES (CONTINUED)

4. Select “Add New” to add an employee or select an existing employee from the left to make modifications.

5. Enter the employee’s information. The only required fields are name, PIN code and job.

6. Press “Save” when complete.

CREATING/EDITING DISCOUNTS

1. From the manager screen, select “Discounts”.

2. Select “Add New” to create a discount or select an existing discount from the left to make modifications.

3. Enter the name of the discount and set how it will affect the price of an item (the discount can be a percentage, dollar amount or a forced price)

Other available options include:

• You can restrict discounts to certain items, departments, customers, jobs, or item tags using the boxes on the right.
• The filters at the bottom allow you to limit the discount to certain days, dates and times.
• You can toggle whether the discount will apply automatically when an item ticket is eligible or needs to be applied manually.

4. Press “Save” when complete.
**CREATING/EDITING ORDER TYPES**

1. From the manager screen, select “Order Types”.

2. Select “Add New” to create a new order type or select an existing order type from the left to make modifications.

3. Enter the name of the order type.

4. Adjust required settings on how this type of order will function.

5. Press “Save” when complete.

**ITEM TRACKING**

1. From the manager screen, select “Item Tracking”.

2. Select an item on the left to update quantity on hand. You can also set a quantity at which the system will alert you that the item is running low.

   Note: Make sure you activate the Item Tracking module or your inventory will not deduct.

**GENERAL SETTINGS**

The general settings section offers options to configure tips, default view, end of day options, taxes and tender types.
GENERAL SETTINGS (CONTINUED)

BUSINESS DAY SETTINGS
On the General Settings screen, you can set your primary Echo view to ECR or POS mode, turn tips on or off, set the suggested tip amounts, auto-logout time, and set your End of Day options.
Note: Auto-logout time can be set from 0.5-15 minutes.

MANAGING TAXES
Select “Manage Taxes” on the left of the screen to modify your tax settings. This screen offers options to create new or edit existing taxes.

MANAGING TENDERS
Select “Manage Tenders” on the left of the screen to modify your tender types. This screen offers options to create a new Tender Type, or edit existing Tender Types.

RECEIPT SETTINGS
The receipt settings section allows you to select what information appears on the customer receipts. This includes:
- Items
- Modifiers
- Modifier prices
- Tip suggestions
- Custom Receipt Footer

MANAGING DAY END
Select “Manage Day End” on the left of the screen to modify your end of day settings. This screen allows you to set the time for the end of the business day, set the default starting cash amount, enable editing of the starting cash amount, block the day end process if there are open tickets, and set up an email to be sent upon batching out the system.