

micros[®] e7

**Common Manager
Operations**

**COPPERSTATE BUSINESS SYSTEMS
(480) 603-3020**

PROCEDURE: Clocking out an Employee that did not clock

- 1) Using a Manager Card or ID, enter “Manager Procedures”
- 2) Press “Employees” (Left – Top of screen)
- 3) Scroll to and then press the employee needing to be clocked out
- 4) Press “Time Card Adjustment” (Right – Middle of screen)
- 5) Select the top time card detail by pressing anywhere along the row
- 6) Press “Edit” (Left – Bottom)
- 7) When asked “Employee is currently clocked in. Do you wish to clock them out?” press “Yes”
- 8) Adjust the time of clock-out if desired
- 9) Press “Save” (Left – Bottom)
- 10) Adjust any other employees as needed by repeat steps 4-10
- 11) Press “Exit” (Right – Top) when done

PROCEDURE: when there is a Database Mismatch error

- 1) Using a Manager Card or ID, enter “Manager Procedures”
 - 2) Press the “Workstations” key (Middle–Top)
 - 3) Press the workstation or PC that you want to update *from* (whichever workstation is coming up on the “Database Mismatch” prompt)
 - ⇒ Press “Retrieve Newer Definitions” (next to last key on Bottom–Right)
- ⇒ This can be done to every workstation available, if you so desire (i.e. workstation #1 can “retrieve” from workstations #2, #3, #4, etc. with no negative effects)

PROCEDURE: when a Workstation (or the PC) is on but not recognized by the other Workstations (or the PC)



1st Workstation is Red (Inactive)
2nd Workstation is Red
3rd Workstation is Red
Last light is green and indicates the PC is Active



For example, the above status bar indicates that the PC (the bottom device) is “Active” while the other devices are not recognized as being “Active” (even if they indicate on their own status screen that they ARE Active).

The “cure” is to go to the Workstation (or PC) that is not showing up on the other Workstation(s)/PC and set it as Inactive and then Active right again.

(in this example, the 3 Workstations need to be set to Inactive-then-Active so that the PC recognizes them as “Active”)

- 1) Goto the Workstation (or PC) that is not showing as Active on the other Workstation(s)/PC
- 2) Using a Manager Card or ID, enter “Manager Procedures”
- 3) Press the “Workstations” key (Middle–Top)
- 4) Press the Workstation that you are currently using
- 5) Press “Set _____ Inactive” (third key from the top, right side of screen)
- the blank will be the name of the Workstation (e.g. “Set Bar Terminal Inactive”)
- 6) Press “Yes” when asked to confirm setting the Workstation Inactive
- 7) Press the same key which will now say “Set _____ Active”
- 8) Press “Exit” (Right – Top) when done
- 9) If this prompts a “Database Mismatch” error, press “Ok” and proceed to the appropriate PROCEDURE in this packet
- you may have to set the workstation to Active one more time before exiting

PROCEDURE: Assigning a Number or Magnetic Card to an Employee

- 1) Using a Manager Card or ID, enter “Manager Procedures”
- 2) Press “Employees” (Left – Top of screen)
- 3) Scroll to and then press the employee needing a Mag Card or Sign-In Number
- 4) Press “Edit Employee ID” (Right – Middle of screen)
- 5) Press the Keypad key  to the right of “New ID”
- 6) Enter Sign-In number or Swipe the Mag Card
- 7) Press the Keypad key  to the right of “Confirm New ID”
- 8) Re-enter Sign-In number or Swipe the Mag Card again
- 9) Press “Save” (Left – Bottom)
- 10) Repeat with any other employees as desired
- 11) Press “Exit” (Right – Top) when done

PROCEDURE: (Re)Opening a Closed Check

(This is also the procedure used to reprint a closed check)

- 1) Sign-in as a Manager (i.e. goes to Manager screen)
- 2) Press the “ReOpen Closed Check” key
- 3) Pressing the column headings will sort the closed checks (e.g. pressing “Check” will sort numerically by check number, pressing “Check” again will reverse the sort from ascending to descending [to ascending ...])
- 4) Press the check to be reopened, then press “OK”
- 5) Press the payment (Cash, Visa, etc.) and press “Void”
- this makes the check “live” again, as if it had never been paid
- 6) Adjust the check if needed (adding new items, discounting, etc.)
- 7) Pay (close) the check as desired (Cash, Visa, etc.)

- ⇒ If a check is opened, but no changes are made (e.g. just looking at a check):
- a) double-check that the Amount Due is \$0.00
 - b) close the check to Cash (this will not alter Cash totals nor the amount of cash due since the Amount Due is \$0.00)

Ex. Scenario #1: Check is closed to Cash instead of the Credit Card that was swiped

- 1) Reopen the check
- 2) Press the “Cash” line on the check (it should be the last line)
- 3) Press “Void” – the Cash line should disappear and the Amount Due should be more than \$0
- 4) Press “Close Credit Card”

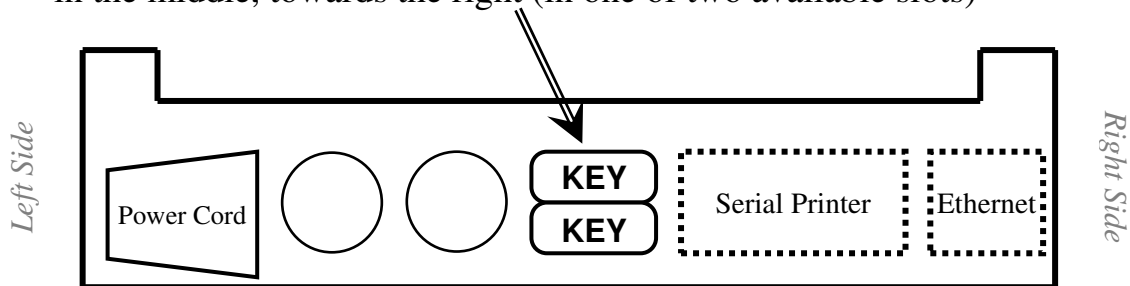
Ex. Scenario #2: The employee is not sure if the check was entered or tendered correctly

- 1) Reopen the check
- 2) Look over the check or Print the check (it will then have to be picked up again)
- 3) Since no changes were done, press the “Cash” tender – this will close the check to \$0.00 cash, which is essentially “nothing”

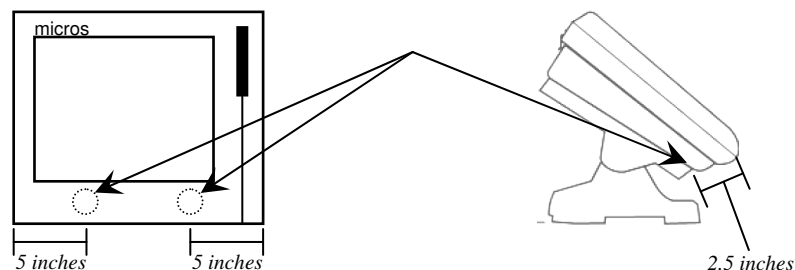
PROCEDURE: when there is a “Grace Period” error

(This can happen if workstation loses connection with the Blue Key inside)

- 1) This will require getting into the top/back of the workstation (or the back of the PC if that is where the error occurs)
- 2) The top of the e7 Workstation has a flap-door that is 5.5” wide and 2” deep, inside of which is a blue Micros key
– if you are looking from the front of the device, over the top, the key will be in the middle, towards the right (in one of two available slots)



- 3) Simply unplug the key and plug it back in by pulling the key straight out between 1/4 and 1/2 of an inch
- the key does not have to be pulled out of the workstation; when the key feels “loose” (often there is a slight ‘pop’ feeling), plug it back in (another ‘pop’)
- 4) If the flap-door is “stuck” shut, then the workstation must slide up on the stand a bit – this will allow the flap-door to open:
 - a) locate the two, black thumb-screws on the bottom of the device, just around the back, and unscrew them
- the screws are 1/4” across & 1/8” deep
- they are located 5” in from the outermost side of the workstation and 2.5” from the bottom edge/seam of the workstation
 - b) once the screws are undone, the workstation will move up-and-away from the base just enough to allow the flap-door to open
 - c) use the above steps to reset the switch, then re-secure the base




PROCEDURE: Changing the time/date (clock) of the e7(s)

- 1) Using a Manager Card or ID, enter “Manager Procedures”
- 2) Press “Workstations” (Middle – Top of screen)
- 3) Press “Set Date and Time” (Middle – Right of screen)
- 4) Press the part of the date or time you want to change (e.g. hour, minute, year, etc.). Use the plus (+) and minus (–) keys to adjust.
- check the box “Update all workstations?” to transmit the time/date change to ALL of the workstations.

⇒ Note: if a PC is being used, the PC’s clock will be updated also

- 5) Press “Exit” (Right – Top) when done

PROCEDURE: Adding Menu Items

- 1) Using a Manager Card or ID, enter “Configurator” or “Programming”
- 2) Use the Triangle ▼ in the Upper Left corner to access the drop-down bar and go to “Menu”
- 3) Select the Category for the new menu item
- 4) Select a menu item that is similar to the one you are creating
- 5) Using the Triangle in the Upper Middle of the screen to get to “Add Copy of Menu Item”
- 6) Press the green Keyboard button in the Upper Right of the screen to get the onscreen keyboard
 - if the keyboard is too small, press the Triangle in the Upper Right of the screen and use the drop-down bar to get to “Next Input Method”
- 7) Go to the “Main” tab (the row of tabs just under the top toolbar)
- 8) Go to the “Name” section and highlight the current name
- 9) Type the new name
 - the name you type is what will print on the Bar requisition as well as the customer’s guest check – if you want a different name displayed on the touchscreen to the server, type that name in the field marked “Touchscreen”
- 10) Press the “Member Of” tab and verify the Report Groups for the new item
- 11) Press “Prices” and verify/change the price
- 12) Press the Save key – the floppy disk looking icon in the Upper Left of the toolbar 


PROCEDURE: Adding Employees

- 1) Using a Manager Card or ID, enter “Configurator” or “Programming”
- 2) Use the Triangle ▼ in the Upper Left corner to access the drop-down bar and go to “Employees”
- 3) Press the Employee Category where the new employee will be added (e.g. “Front of House”)
- 4) Select an employee with a similar job
- 5) Use the Triangle in the Upper Middle to get to “Add copy of Employee”
- 6) Press the green Keyboard button in the Upper Right of the screen to get the onscreen keyboard
 - if the keyboard is too small, press the Triangle in the Upper Right of the screen and use the drop-down bar to get to “Next Input Method”
- 7) Go to the “General” tab (the row of tabs just under the top toolbar)
- 8) Go to the “First name” section and highlight the current name
- 9) Type the new name
- 10) Repeat for “Last Name”
- 11) Go to the “POS” tab and change the “Check name” box to whatever you would like printed at the top of this employee’s checks
- 12) Go to the “Job Information” tab
- 13) If using the Micros for payroll for this employee, select the box called “Employee uses timekeeping”
- 14) Select a “Default job” from the dropdown list
- 15) If the job shown in the “Job Rates” box is correct, simply verify/correct the “Regular rate”

PROCEDURE: Adding Employees, con't

- 16) If the job is NOT right or you want to have more than one job for this employee:
 - Select the job to remove and pres the red minus “-” above the word “Job”
 - Press the green plus “+” then select the job from the “Job” drop-down list
 - Verify/update the employee’s pay in the “Regular rate” field

- 17) If not using Mag Cards, go to the “Security” tab and enter the employees sign-in code in the “Password ID” field
 - if using Mag Cards, use procedures in the User’s Guide
 - if using Mag Cards and would like to ALSO assign a number (so that both the Card and the Number work), enter the sign-in number in “Alternate password ID”

- 18) Press the  Save key – the floppy disk looking icon in the Upper Left of the toolbar