

**FREQUENTLY ASKED QUESTIONS ON HART
POS**



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1. INTRODUCTION TO HART POS

HART POS can be either used independently or in link with any of the HART PMS modules.

As a result it can be configured to run a business in a variety of configurations. Some examples include:

- Single Retail Point Of Sales including just the till application
- Multiple point Of Sales configuration including multiple tills
- Any Point Of Sales configuration with Stock Control option
- Any Point Of Sales configuration with Sales & Marketing option
- Any Point Of Sales configuration with Sales Ledger
- Any combination of the previous with or without Central Management
- Hotel EPOS in the framework of HART PMS

After you have completed your POS configuration (inside the HART PMS software –see the relevant manual) you must double click on the POS icon that exists on your desktop:



The first window that opens in front of you is the POS logon window:



Here you can select:

- Whether you want to use the HART POS training mode by checking the **Training** check box
- The desired **Language** from the drop down menu.
- The desired **Hotel** (in cases of multiple connections) from the drop down menu.

Otherwise you can press the **Logon** button if you want to logon to your POS or **Exit** if you want to close the window.

Once you press **Logon** the **Configure/Choose Outlet** window opens in front of you. This window allows you to select which outlet you want to connect to:



At the left part of the window you can see all **Configured outlets** and the **computer port** in which their receipts are printed. The **Up** and **Down** buttons allow you to scroll the window up or down in cases that you have many available outlets and cannot see all of them.

Usually the configured/available outlets will appear in front of you immediately, but in cases that the administrator has not already configured the outlets, you can use the buttons on your right to do that. Let's see what these buttons allow you to do (from top to bottom):

- : Once you press this button the window expands to your right and there you can see all POS **Available outlets**:



You can select the outlet you want to add to the configured outlets list by left clicking on it (on the right part of the window) and pressing the  button in the middle part of the window. The outlet will be immediately transferred to the configured outlets list on your left.

- : Once you press this button the window expands to your right and there you can see all POS available outlets:



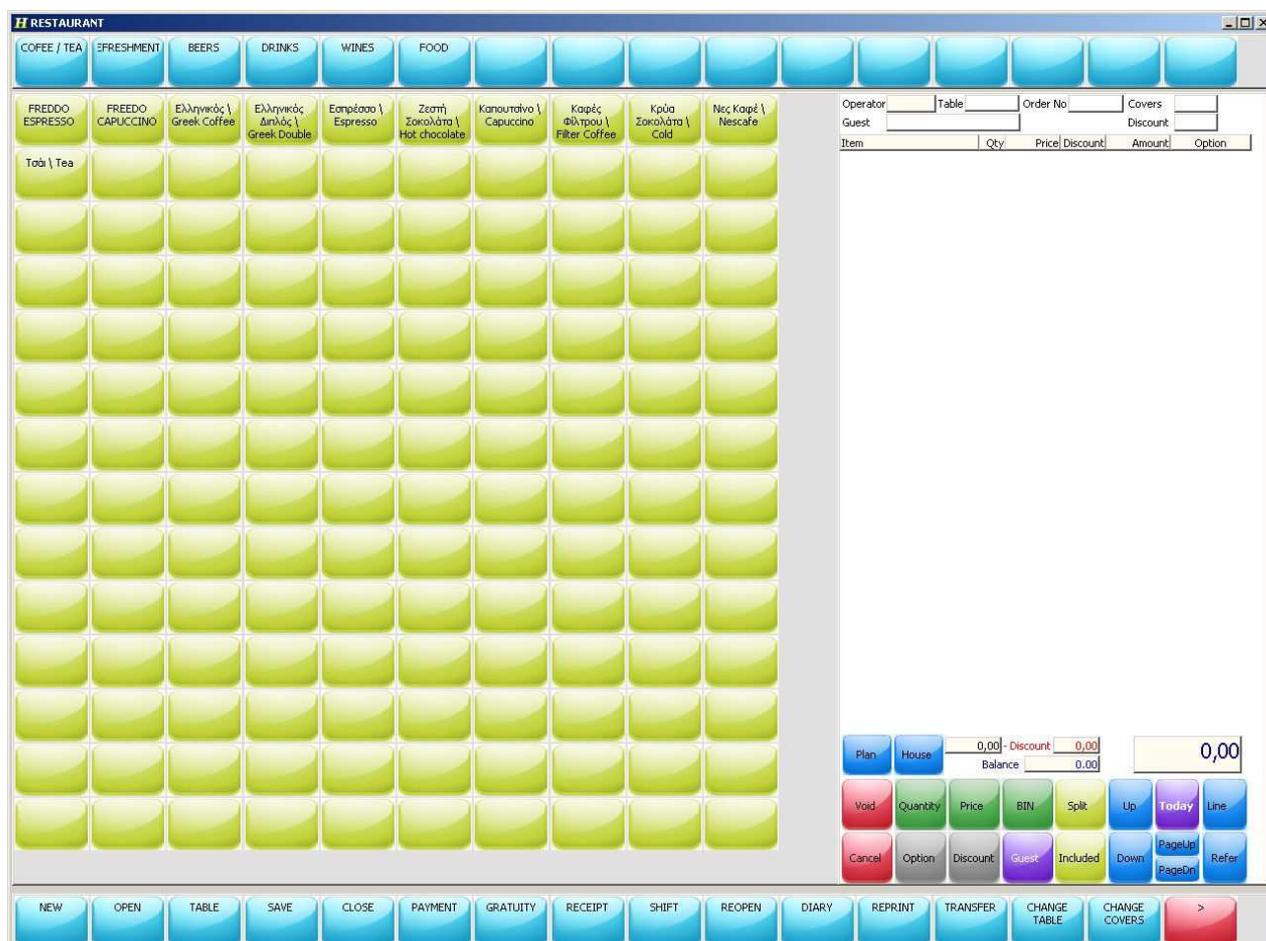
You can select the outlet you want to remove from the configured outlets list by left clicking on it (on the left part of the window) and pressing the  button in the middle part of the window. The outlet will be immediately transferred to the available outlets list on your right.

- : Once you press this button the HART PMS logon window opens in front of you, so that you can enter your software and configure your outlets further.
- : Once you press this button the Configure/Choose Outlet window closes.

Select the configured outlet you want to connect to, by left clicking on it.

MAIN HART POS WINDOW:

This is how the main HART POS window will look like (more or less):



The window is separated in five parts:

- The buttons at the **far top row** of the window show you the outlet's **primary sales groups**.
- The buttons at the **wide left part** of the window show you each primary sales group's **items** (you must first select the primary sales group you want to see items for).
- The buttons at the **far bottom part** of the window allow you to make all your actions.

These buttons are the following:

- **New:** Opens up a new order.
- **Open:** Opens up all open orders.
- **Table:** Opens up the open orders of the table number/name requested.
- **Save:** Saves the order you have entered.
- **Close:** Closes the order in front of you.
- **Payment:** Opens up the payment window.
- **Gratuity:** Opens up a window where you can key in the gratuity amount.
- **Receipt:** Issues a receipt for the order in front of you.
- **Shift:** Opens up a shift report for the operator requested.
- **Reopen:** Reopens orders already closed.

- **Diary:** Links your outlet with the restaurant diary (basically it gives you a list with all restaurant bookings and opens up the order by bringing its basic information automatically).
- **Reprint:** Reprints the receipt requested by order number.
- **Transfer:** Transfers an order from one POS to another.
- **Change table:** Changes the table number/name.
- **Change Covers:** Changes the number of covers inside the order.
- **Merge Tables:** Merges more than one table into one.
- **Printers:** Opens up a POS Receipt and POS Report printer window definition.
- **Remove Service Charge:** Removes the predefined service charge.
- **Add Service Charge:** Adds the service charge to your order.
- **Top Up Card:** Allows you to enter more money inside a card (by keying in the cards number and the amount).
- **Open Drawer:** Opens up the POS cashier drawer.
- **Statement:** Opens up a transaction statement for the card requested.
- **Exit:** Closes the POS.

TIP: The red button (with the small arrow on it -> or <- expands the button selection to your right and to your left.

- The white area at the **top right part** of the window is the order sheet (items will appear here once you start selecting them). The information appearing at the top part of the order sheet is the following:

- **Room:** The room number in which the guest stays in (if there is one).
- **Table:** The number/name of the table from which the guest made the order.
- **Order No:** The order number.
- **Covers:** The number of covers (usually the number of guests seating on the table).
- **Guest:** The name of the guest who ordered.
- **Discount:** If the operator has given a discount to the order.

The information that you can see for each item inside the order is the following:

- **Item:** The item name/description.
- **Qty:** The item quantity.
- **Price:** The item price.
- **Discount:** The amount of discount given (if any).
- **Amount:** The final item amount (together with the item quantity and any given discount).
- **Option:** The item option (if any).

- The buttons at the **bottom part of the order sheet** allow you to make the following actions:

- **Plan:** Opens up a table plan of the outlet (you can create the outlet plan from your HART PMS; specifically from Configuration→ Facilities→ Layout button).
- **House:** Gives a house use discount at the order; usually 75% on the order total (you can enter the outlet's house discount from your HART PMS; specifically from Configuration→ Outlets→ Configuration tab).
- **Void:** Erases the selected item.
- **Quantity:** Allows you to change the selected item's quantity.
- **Price:** Allows you to change the selected item's price.
- **BIN:** Allows you to find an item by its BIN code (you can enter the item's BIN code from Materials→ Items).
- **Split:** You can split an order by item; this button is helpful when guests ask you to pay an order separately and by item. You can split the items of one order up to 10 smaller ones.

- **Up:** Moves your item selection (highlighted) upwards.
- **Today:** Gives you a summary of the outlet's **Revenue, Covers and Open Orders** for the day so far.
- **Line:** Creates an empty line inside the order (this is helpful for the preparation of the order because the empty line separates the items, for example: Salads, Appetizers, Main Dishes etc).
- **Cancel:** Cancels the entire order.
- **Option:** Opens up a window with the selected item's options (you can edit the item's options from your HART PMS; specifically from Materials→ Items→ Options tab). The Custom button inside the Option window allows you to key in options that are not predefined.
- **Discount:** Allows you to make a discount to the order (either the entire order or specific items of it).
- **Guest:** Allows you to link the order with a specific guest (non resident).
- **Included:** Allows you to manage your guest's inclusive services (usually allowances).
- **Down:** Moves your item selection (highlighted) downwards.
- **Page Up/Page Down:** Allows you to move your order upwards or downwards (in cases where orders are very long and cannot see them entirely).
- **Refer:** Links a specific operator with a specific item (in cases where operators are advised to promote specific products and can get commission of their sale).



2. HOW CAN I CREATE A NEW POS ORDER?

- Press **New**.
- Key in your **Operator** code (if HART POS asks you for it).
- Select the **Room** in which the guest stays (if there is one and if HART POS asks you for it).
- Key in the **Table** number/name (if HART POS asks you for it).
- Key in the **Cover** number (if HART POS asks you for it).
- Select the desired **Items**.
- Once you have selected all the desired items press **Save**.

TIP 1: Before you press Save you can change the quantity of an item by pressing the **Quantity** button or/and you can change the price of an item by pressing the **Price** button.

TIP 2: Depending on your outlet's configuration, once you press the **Save** button:

- **Receipt & Keep:** You get a printout of the receipt and the order remains open.
- **Receipt & Close:** The **Payment** window opens immediately; there you can select the payment method of the order. You get the receipt printout once you complete the payment and the order closes.
- **Manual:** The order is just saved. The payment window will open once you decide to press the **Payment** button and you get the receipt printout once you decide to press the **Receipt** button.



3. HOW CAN I PAY OUT A POS ORDER?

Depending on your outlet's configuration the **Payment** window either appears automatically in front of you (Receipt & Close) or you need to press the **Payment** button (Receipt & Keep and Manual). The **Payment** window looks like this:

At the far left part of the window you can see several buttons which allow you to make different types of payments. Specifically:

- **Cash:** Shows you all available payment methods at the middle part of the window.
- **Room:** Shows you all checked in rooms at the middle part of the window.
- **House:** Shows you all house folios at the middle part of the window (House folios are created inside your HART PMS; specifically inside Financials → Sales Ledger (usually the hotel account) → Folios tab: House folios ARE NOT included in revenue).
- **Event:** Shows you all checked in events at the middle part of the window.
- **Non R:** Shows you all checked in non resident bookings at the middle part of the window.
- **Folio:** Shows you all active folios at the middle part of the window.
- **Member:** Allows you to enter a membership card number and make the payment with the selected card.
- **Debtor:** Allows you to select a guest and make the payment as debtor (the guest will still owe you the money).

Once you select the method in which the guest paid (by left clicking on it), HART POS will bring it at the bottom part of the window. The information that you can see for each payment method is the following:

- **Room:** The room number/name (if any).
- **Folio/Account:** The folio or the account name (if any).
- **Payment:** The payment method.
- **Amount:** The amount paid.

In order to complete your payment you must press the **Add** button at the bottom right part of the window. There you can also see and use four more buttons:

- **Split:** Allows you to split the payment into more than one parts. Key in the number of parts you want to split the payment to (on your right) and select the amount (**Next Payment** field-on top) and the method (middle part) of the payment.
- **Receipt:** Gives a receipt printout of the order.

- **Del:** Deletes the payment you have already entered (in cases of mistakes).
- **Exit:** Closes the payment window.

The top right part of the window (**Cash** frame) helps you enter the money the guest has paid you with (cash) and quickly calculate the change that you must give back. The **Paid** field shows you the amount paid and the **Change** field shows you the amount you need to return to the guest. The **Undo** button cancels the payment you just entered (if you have made a mistake) and the **End** button completes the transaction.

The middle right part of the window helps you with the payment Splits. The **Order Total** field shows you the order total amount, the **Balance** field shows you the outstanding amount to be paid and the **Next Payment** field shows you the amount that the next payment will involve. The **Deposit Split** button is used to split restaurant booking deposits.

The logo for HART features a stylized blue 'H' on the left, followed by the letters 'A', 'R', and 'T' in a grey, sans-serif font. The 'H' is composed of two vertical bars and a horizontal bar, with a small grey shape integrated into its top right corner.

4. HOW CAN I GIVE A DISCOUNT TO A POS ORDER?

After you have created a new order and selected the desired items, you can press the **Discount** button, in order to give a discount to the order or specific items of it. Once you press the Discount button, this window appears in front of you:

Item	Qty	Price	Discount	Amount
Esom Zokolatra \ Hot choco	1,00	3,00		3,00
Kanoulativo \ Capuccino	1,00	2,00		2,00
Kafes Filtrou \ Filter Coffe	1,00	2,00		2,00
Króa Zokolatra \ Cold choco	1,00	3,00		3,00

Value 10,00 Discount 0,00 Total 10,00

There you must:

- Check the **Percent** check box if the discount is by percent. Un-check it if the discount is by amount.
- **Right underneath:** Key in the **percent** or **amount** of the discount.
- Select the discount **Type**:
 - **Item:** If the discount is on a specific item (select the item on the right part of the window).
 - **Order:** If the discount is on the entire order.
 - **Member:** If the discount is on a specific membership card (key in the card number or swipe it).
 - **Category:** If the discount is on a specific category (Food, Beverage, Other).

Press the **Reset** button in order to reset the discount given or press the **Exit** button in order to close the Discount window.

Press **Save**.

5. HOW CAN I TURN A REGULAR POS ORDER TO A HOUSE ORDER?

After you have created a new order and selected the desired items, you can press the **House** button in order to turn your order into a house order.

Once you press the **House** button you will see that at the top part of the order sheet, a green frame appears (**House Order**) informing you that the order will turn to house.

Operator	Table 5	Order No 0	Covers	2	
Guest		House Order	Discount		
Item	Qty	Price	Discount	Amount	Option
Καφές Φίλτρου \ Filter Coffe	1	2,00		2,00	
Καπουτσίνο \ Capuccino	1	2,00		2,00	
Φρουτοσαλάτα \ Fruitsalad	1	5,00		5,00	
Πιατέλα τυριών \ Cheese Pla	1	8,00		8,00	
Ντάκος / Dakos	1	6,00		6,00	
Ψαρονέφρι / Pork Fillet	1	15,00		15,00	

Then you must press **Save**. Once you do that you will see that HART POS calculates the predefined house discount (usually 75%) and the order total changes immediately:

Operator	Table 5	Order No 1388	Covers	2	
Guest		House Order	Discount		
Item	Qty	Price	Discount	Amount	Option
Καφές Φίλτρου \ Filter Coffe	1	2,00	1,50	0,50	
Καπουτσίνο \ Capuccino	1	2,00	1,50	0,50	
Φρουτοσαλάτα \ Fruitsalad	1	5,00	3,75	1,25	
Πιατέλα τυριών \ Cheese Pla	1	8,00	6,00	2,00	
Ντάκος / Dakos	1	6,00	4,50	1,50	
Ψαρονέφρι / Pork Fillet	1	15,00	11,25	3,75	

Then, during the payment process you must press the **House** button (at the far left part of the window) so that all house folios appear at the middle part of the window. Select the desired house folio (by left clicking on it) and press **Add**. The order will immediately be transferred inside the selected house folio.

6. HOW CAN I CANCEL AN ITEM OR THE ENTIRE ORDER?

There are three time phases during which you can cancel an item or the entire order:

- **Before you press Save:**
 - Select the item you want to cancel and press the **Void** button.
 - Press the **Cancel** button in order to cancel the entire order.
- **After you have pressed Save but have not yet paid/closed the order:**
 - Select the item you want to cancel and press the **Void** button.
 - Press the **Cancel** button in order to cancel the entire order.

TIP: If your outlet is on Receipt & Keep mode and the receipt has already been printed out, once you press Void or Cancel you will also get a Void receipt on your printer.

- **After you have pressed the Save button and have paid/closed the order:**
 - Press the **Reopen** button.
 - Enter your **override code** and the **order number**.
 - Once the order opens up again, select the item you want to cancel and press the **Void** button or
 - Once the order opens up again, press the **Cancel** button in order to cancel the entire order.

TIP: Again you will get a Void receipt for your cancellation.



7. HOW CAN I SEE THE TRANSACTIONS OF MY SHIFT?

- Press the Shift button at the bottom row of your HART POS.
- Key in your operator code.
- Your shift report will open in front of you:

Order Table	Open Time	Amount	Covers
1384	F 10:36	4,50	2
1385	J 11:34	9,00	2
Total	2	13,50	4

Order Table	Open Time	Close Time	Room No	Guest / Account	Amount	Covers
1386	F 11:54	11:58 0			10,00	3
1387	B 12:00	12:09 0			9,00	2
1388	S 12:15	12:23 0			9,50	2
Subtotal			Number of Checks	3	28,50	7
Grand Total			3		28,50	7

The information that you can see inside the main part of the report is the following:

- Your orders still open. The information that you can see about each open order is:
 - **Order:** The order number.
 - **Table:** The table number/name.
 - **Open Time:** The time on which the order was opened.
 - **Amount:** The order amount.
 - **Covers:** The number of covers involved.
- Your closed orders. The information that you can see about each open order is:
 - **Order:** The order number.
 - **Table:** The table number/name.
 - **Open Time:** The time on which the order was opened.
 - **Close Time:** The time on which the order was closed.
 - **Room No:** The room number to which the order was closed (if any).
 - **Guest/Account:** The guest or account name to which the order was closed (if any).
 - **Amount:** The order amount.
 - **Covers:** The number of covers involved.

At the top row of the report you can also see several buttons. Here's what each one of these buttons does (from left to right):

- **Page Up:** Moves the report page upwards.
- **Page Down:** Moves the report page downwards.
- **By room:** Shows the orders by room number.
- **By order:** Shows the orders by order number.
- **Print Report:** Gives a printout of the report (if you have installed a report printer for your HART POS).
- **OK:** Closes the report.
- **Exit:** Closes the report.

TIP: You can see the Shift reports of previous days from your HART PMS; specifically from Reports→ Financials→ POS Shift Reports.

8. HOW CAN I CHANGE THE PAYMENT METHOD OF AN ORDER ALREADY CLOSED?

- Press the **Reopen** button at the bottom row of your HART POS.
- Key in your **override code** and the **order number**.
- Once the order is open in front of you, just press the **Payment** button and select the correct payment method.

ATTENTION: In order for you to make discounts, cancellations, turn regular orders into house orders, change prices and reopen orders, you will need to have sufficient rights. Operator rights are configured from your HART PMS (see relevant part of this manual).

