

---

# Front End Training Guide - Managers

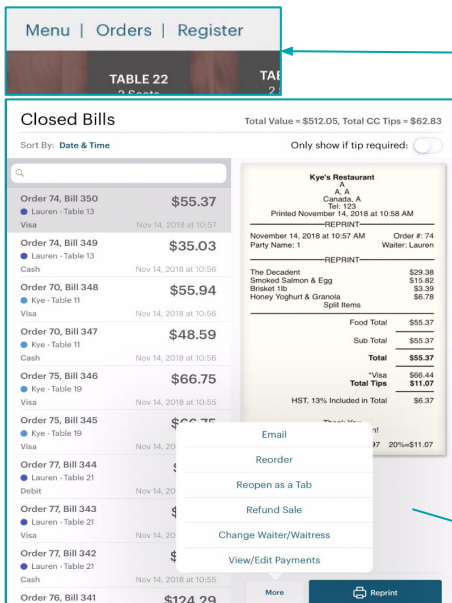


# Index

Refunds .....	3-4
Reports .....	5
Staff List .....	6
Perform End of Day .....	7-8

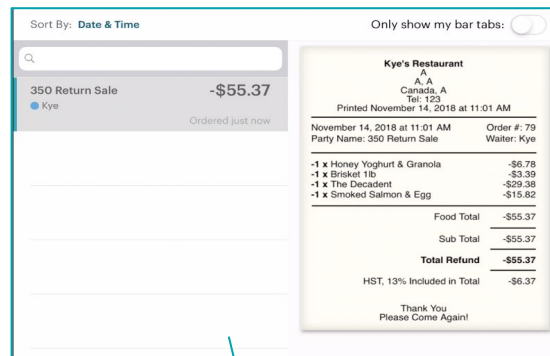


# Refunds

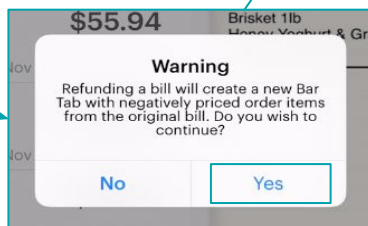


To start your refund process: select Orders (top left of the floorplan screen) > Closed Bills

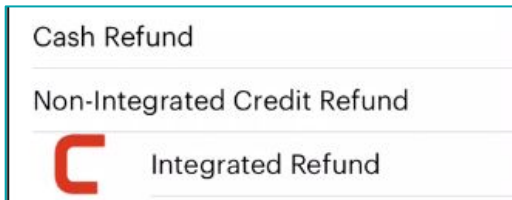
Tap onto Bar Tabs at the top of the screen. Select the negatively priced bill, and select Edit Order at the bottom



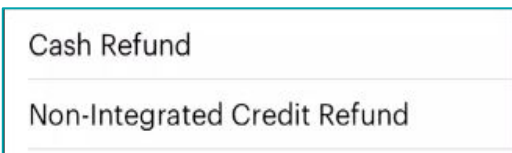
You can see all the items being returned on this bill. You can delete any items that you **do not** want to refund. Then tap on Checkout



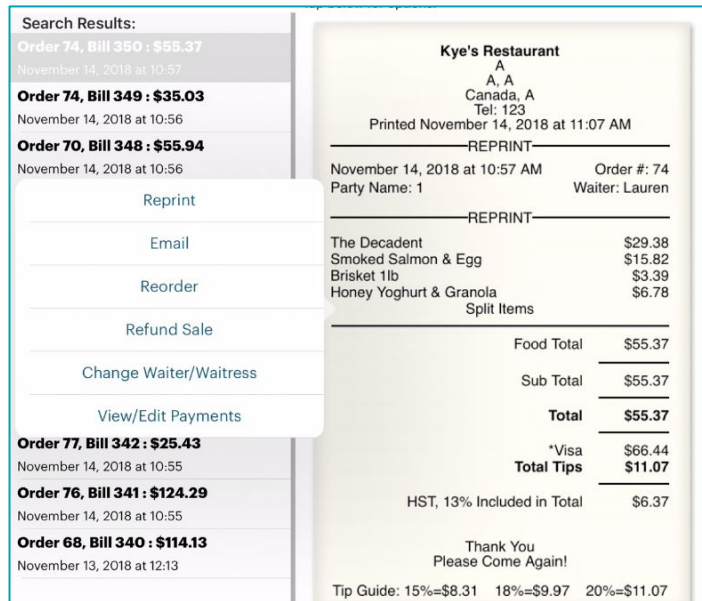
# Refunds (Previous Day)



If you are using an integrated payment processor you will see something like this. Select the appropriate type of refund and follow the steps on the screen.



If you are unintegrated, you will see these options. Select the appropriate type of refund and follow the steps on the screen.



To refund a bill from a previous business day, on the main screen tap on Options > Bill/Guest Check History. You can use the Start & End date to search for a bill from a specific time. If you tap on one of the search results, then on the picture of the bill, you can refund the sale through here.

# Reports



Restaurant Reports Generate Report

Start Date	Years: <input type="radio"/>	End Date
Thu Nov 15 9 57	<input type="button" value="Business Day"/>	Sat Nov 17 4 47
Fri Nov 16 10 58	<input type="button" value="Load Template"/>	Sun Nov 18 5 48
Sat Nov 17 11 59	<input type="button" value="Save Template"/>	Mon Nov 19 6 49 AM
Sun Nov 18 12 00 AM	<input type="button" value="Save Template As"/>	Today 7 50 PM
Mon Nov 19 1 01 PM		Wed Nov 21 8 51
Today 2 02		Thu Nov 22 9 52
Week Nov 21 3 03		Fri Nov 23 10 53

Sales Accounting Menu Payments Labor

**Possible Reports**

- Hours Report**  
List waiters number of shifts and total hours
- Detailed Shift Report**  
A detailed list of shift lengths & times
- Cash Tip Report**  
A summary of the cash tips recorded by each waiter.
- Credit Card Tips Report**  
List the tips generated from credit card transactions
- Waiter Tip Summary**  
Display the total amount of tips collected by each waiter.
- Deleted Items Report**  
Displays information on how many items waiters have deleted from orders.
- No Sale Report**  
Displays information on how many times the cash drawer was opened without an order.

**CURRENT REPORT**

- Hours Report**  
List waiters number of shifts and total hours
- Detailed Shift Report**  
A detailed list of shift lengths & times

## Where to find reports?

- From the Floorplan, tap Admin/Options > Reports

## Creating Templates

- Choose from possible reports on the left
- Preview them by selecting Generate Report (top right)
- Tap “Save Template As” to create a new report, or “Save Template” to make changes to an existing report.

## Loading Pre-set Templates

- Select “Load Template” to view existing report templates. Select your start and end date

## Generate Report

- Select in the top right corner to view your report

## Tips & Tricks

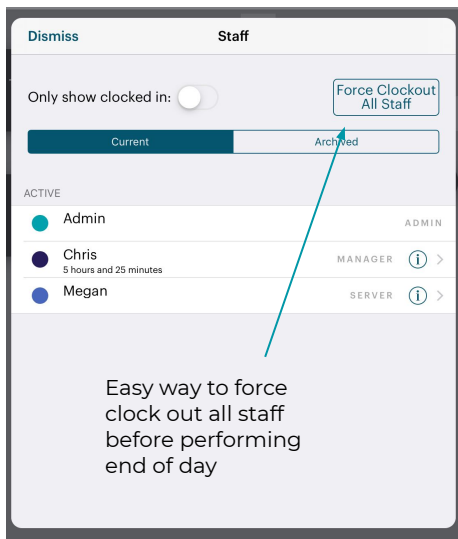
- You must add a name and description to each report
- You can remove a report by tapping the red circle on the left of the report, then “Delete”
- You can also view reports on [cloud.touchbistro.com](https://www.touchbistro.com)

# Staff List

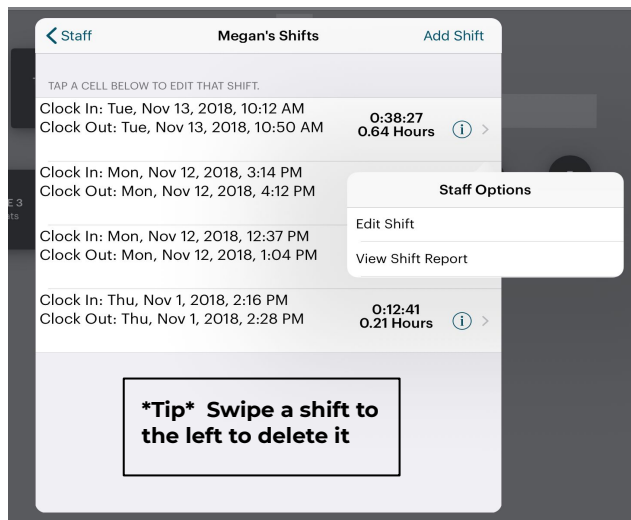
<https://www.touchbistro.com/help/articles/staff-list/>



Login as a manager and tap on Options > Staff List

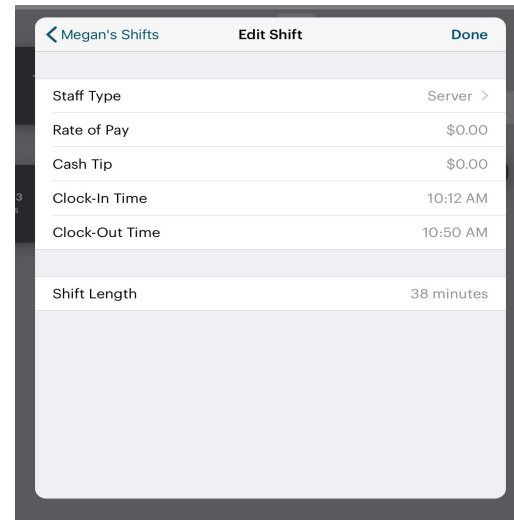


Tap on the ⓘ next to the staff member to edit their clock in time or reprint/view their shift report



Tap on “Edit Shift” to edit a staff member’s shift or select “View Shift Report” to reprint or view the sales for this shift

<https://www.touchbistro.com/help/articles/staff-list/>



You can adjust a servers clock in/out times, cash tips, rate of pay, and more under “Edit Shift”

# Perform End of Day



## Why do I perform End of Day (EOD)?

- To separate today's transactions from tomorrow's
- Ensure your numbers balance (i.e. Cash in till and Credit Card deposit)

## When should EOD be done?

- Every night!
- The night before going live - (separates practice transactions from real)

## Who can perform EOD?

- Anyone you choose (Permissions are set up in Staff > Staff Types)
  - Turn ON "Can Perform EOD," "Can Manage Staff," "Can Manage Orders" (all required)

The screenshot shows a mobile application interface for Bianca's Restaurant. At the top, there are navigation tabs: Menu, Orders, Register, Bianca's Restaurant, Reservations, and Options. The main content area displays the 'End of Day' report for the period from Tuesday, Nov 6, 2018, 4:53 PM to Wednesday, Nov 7, 2018, 3:01 PM. The report is organized into sections: Sales Totals, Payment and Refund Totals, and Statistical Summary. The Payment and Refund Totals section shows Cash, Total Payments, Cash Refund, and Total Refunds, all with a total of \$0.00. The Statistical Summary section shows Total Bills, Avg. Amount per Bill, Total Guests, Avg. Amount per Guest, and Closed Bill Numbers, all with a total of 0. The interface also includes a 'Done' button at the top right and a 'Payouts Report' link at the bottom.

Bianca's Restaurant End of Day	
From: Tuesday, Nov 6, 2018, 4:53 PM	
To: Wednesday, Nov 7, 2018, 3:01 PM	
Sales Totals	
Payment and Refund Totals	
Cash	
Orders: 0	Total: \$0.00
<b>Total Payments</b>	<b>Total: \$0.00</b>
Orders: 0	
Cash Refund	
Orders: 0	Total: \$0.00
<b>Total Refunds</b>	<b>Total: \$0.00</b>
Orders: 0	
<b>Net Total</b>	<b>\$0.00</b>
Statistical Summary	
Total Bills:	0
Avg. Amount per Bill:	\$0.00
Total Guests:	0
Avg. Amount per Guest:	\$0.00
Closed Bill Numbers:	
Payouts Report	

# How to Perform End of Day



1

Options > Perform End of Day  
NOTE: Usually setup for only managers to complete unless otherwise adjusted

2

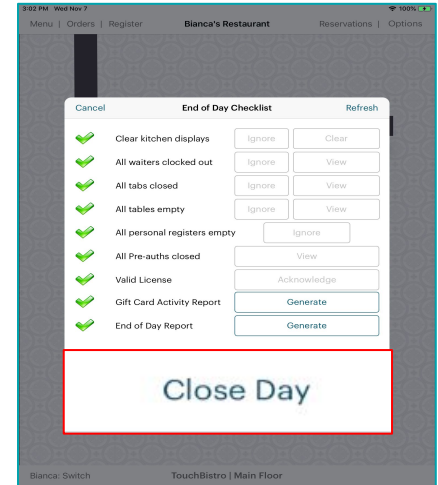
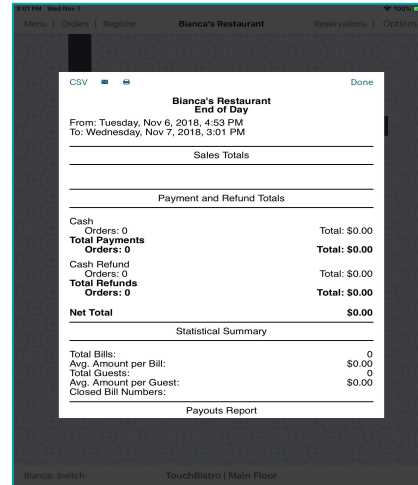
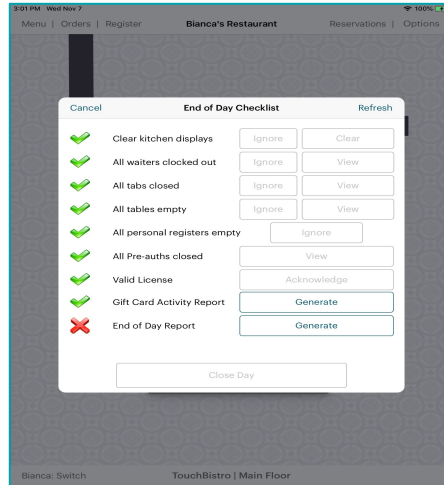
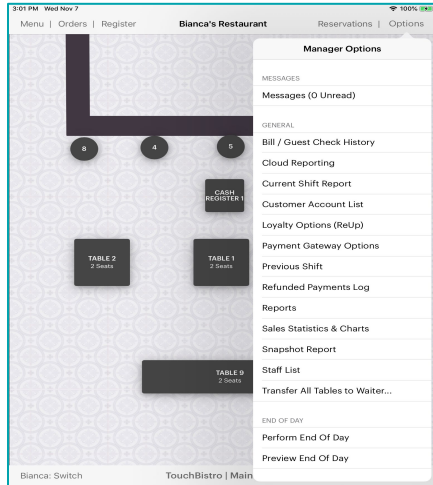
Ensure all areas have a green checkmark. For those that do not - be sure to make the necessary changes

3

Print/Email the report to the necessary parties  
NOTE: Email must be setup on iPad's email app (not TB)

4

**\*TAP CLOSE DAY\***  
This is the most important step to ensure sales are separated between each day



**NOTE:** Don't ignore any red X's. Tabs, tables and personal registers can be closed by going into "Orders." Waiters can be clocked out from the checklist by selecting "View." Pre-Auths will be found in closed bills.