# Front End Training Guide - Managers

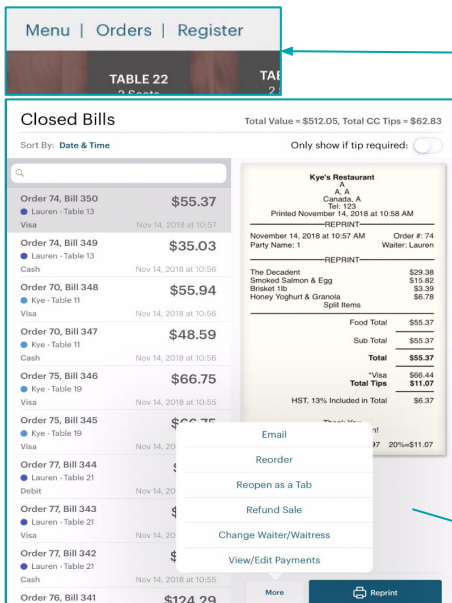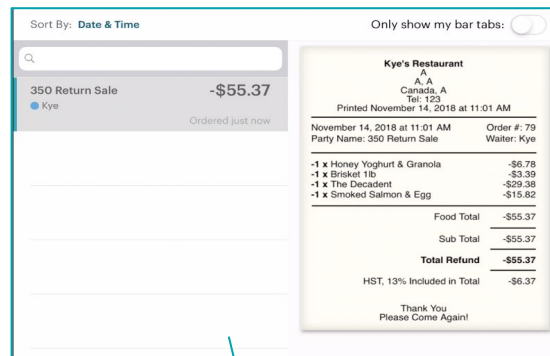**TouchBistro**

# Index

# 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
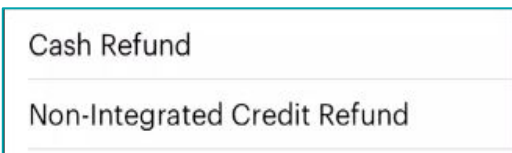
You can see all the items being returned on this bill. You can delete any items that you **do not** want to refund. Then tap on Checkout
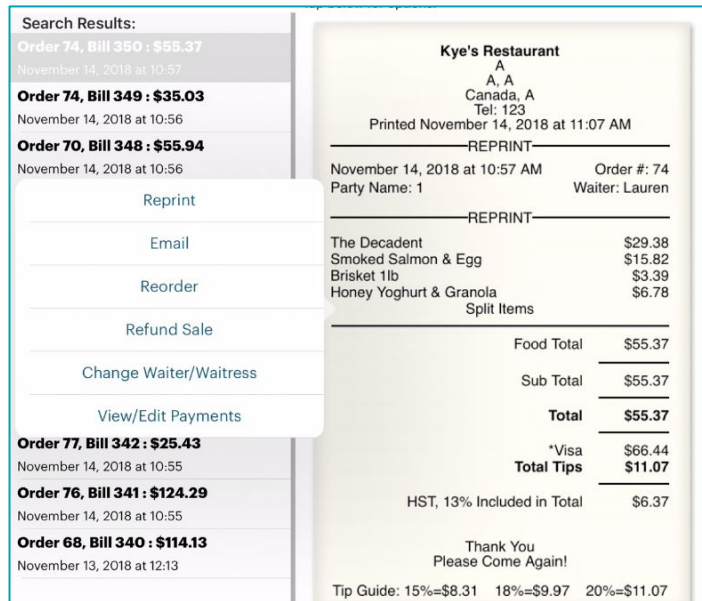
TouchBistro.com
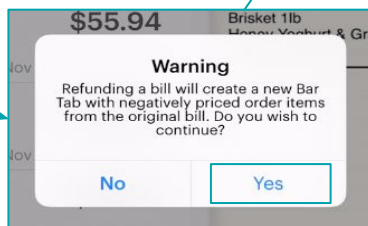
# Refunds (Previous Day)
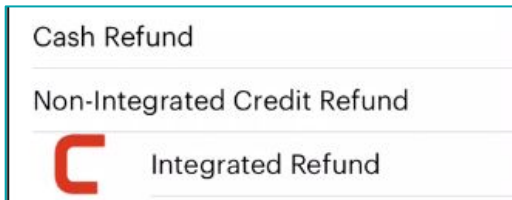


If you are using an integrated payment processor you will see something like this. Select the appropriate type of refund and follow the steps on the screen.



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



**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
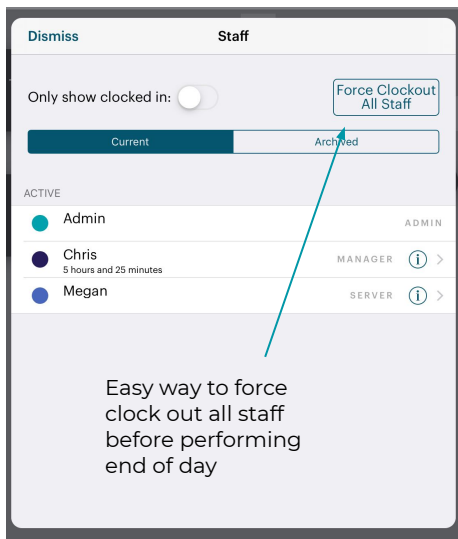
**Tips & Tricks**
- You must add a name and description to each report
- You can remove a report by tapping the red circle on the left of the report, then "Delete"
- You can also view reports on cloud.touchbistro.com

TouchBistro.com

# Staff List

Login as a manager and tap on Options > Staff List

## Screen 1 — Staff

Dismiss     **Staff**

Only show clocked in: [toggle]  |  Force Clockout All Staff

| Current | Archived |

ACTIVE

- Admin      ADMIN
- Chris      MANAGER ⓘ >
  5 hours and 25 minutes
- Megan      SERVER ⓘ >

Easy way to force clock out all staff before performing end of day

## Screen 2 — Megan's Shifts

‹ Staff     **Megan's Shifts**     Add Shift

TAP A CELL BELOW TO EDIT THAT SHIFT.

Clock In: Tue, Nov 13, 2018, 10:12 AM
Clock Out: Tue, Nov 13, 2018, 10:50 AM    **0:38:27 0.64 Hours** ⓘ >

Clock In: Mon, Nov 12, 2018, 3:14 PM
Clock Out: Mon, Nov 12, 2018, 4:12 PM

**Staff Options**

Edit Shift

View Shift Report

Clock In: Mon, Nov 12, 2018, 12:37 PM
Clock Out: Mon, Nov 12, 2018, 1:04 PM

Clock In: Thu, Nov 1, 2018, 2:16 PM
Clock Out: Thu, Nov 1, 2018, 2:28 PM    **0:12:41 0.21 Hours** ⓘ >

**\*Tip\*  Swipe a shift to the left to delete it**

## Screen 3 — Edit Shift

‹ Megan's Shifts     **Edit Shift**     Done

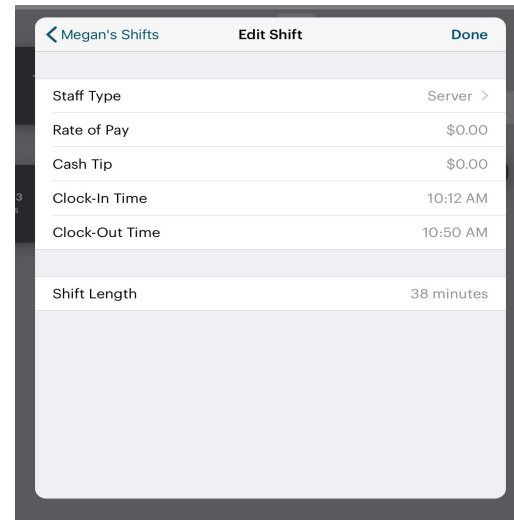| | |
|---|---|
| Staff Type | Server > |
| Rate of Pay | $0.00 |
| Cash Tip | $0.00 |
| Clock-In Time | 10:12 AM |
| Clock-Out Time | 10:50 AM |
| Shift Length | 38 minutes |

---

Tap on the ⓘ next to the staff member to edit their clock in time or reprint/view their shift report
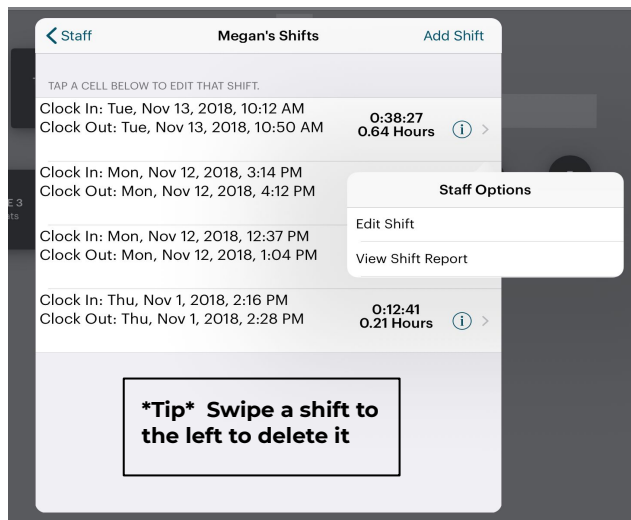
Tap on "Edit Shift" to edit a staff member's shift or select "View Shift Report" to reprint or view the sales for this shift

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

TouchBistro.com

# 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?**

- <u>Every night!</u>
- 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)

TouchBistro.com

# How to Perform End of Day

### 1
Options > Perform End of Day
NOTE: Usually setup for only managers to complete unless otherwise adjusted
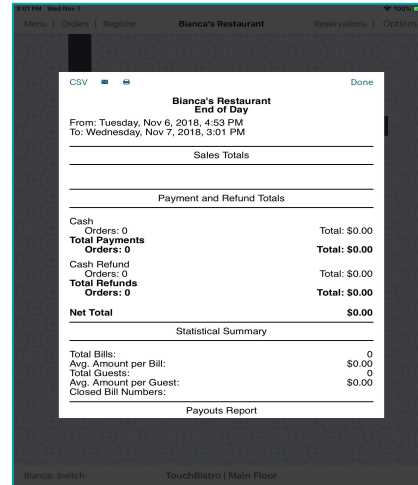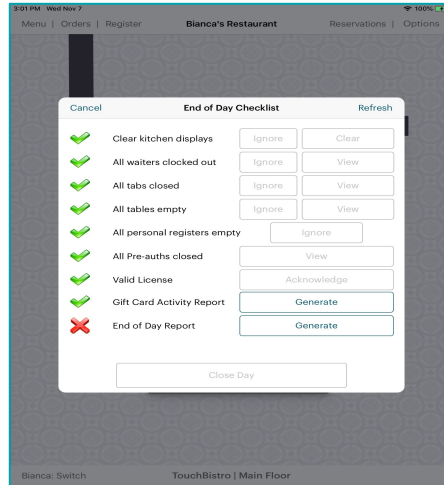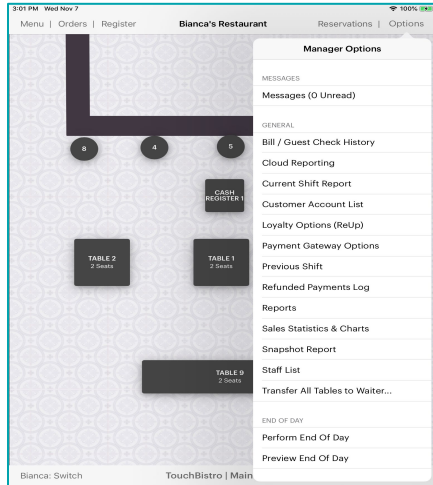
### 2
Ensure all areas have a green checkmark. For those that do not - be sure to make the necessary changes

### 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
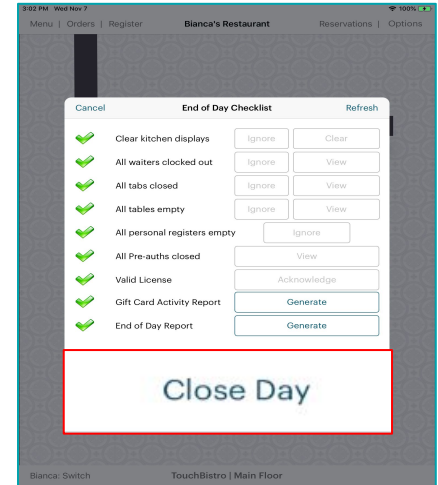








**NOTE:** Don't ignore any <u>red X's</u>. Tabs, tables and personal registers can be closed by going into "Orders."  Waiters can be clocked out from the checklist by selecting "View." Pre-Auths will be found in closed bills.