What's New in TouchBistro 8.4

We've improved our Customer Account feature, better integrating account activity into end-of-day reporting. We have also added a number of improvements to the Cloud Portal's reporting capabilities.

For our UK customers, we now support integrated tableside payment processing with the Paymentsense iWL250.

Consult these releases note for further details about these changes and more.

Need More Help?

Email support@touchbistro.com if you are experiencing any issues with this update.

Customer Account Improvements

In TouchBistro, **Customer Accounts** is a feature that lets you extend temporary credit to customers. Instead of a customer paying for an order, the order can be charged to a preconfigured account. The customer can, at a later date (say, end of the month), settle the account's outstanding balance. The **Customer Accounts** feature is also useful for taking and tracking a deposit on a future order (like a large catering job or a company holiday party).

In 8.4 we've added several improvements:

1. Improved payment/deposit reporting
2. Favoriting Accounts
3. Expanded Account Profiles
4. Account Archiving
5. Improved Account History screen

Improved Reporting

In previous versions, deposits and account payments did not report on payments and deposits, leaving a gap in end of day and monthly income reporting.
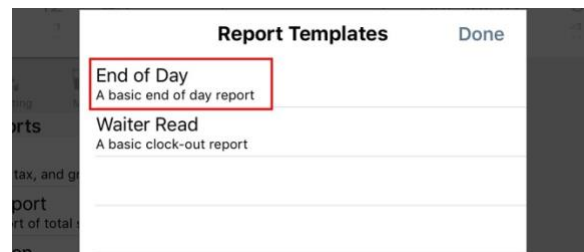

In 8.4 we've improved **Account** reporting. The **Accounts Report** and the **Detailed Accounts Report** (both found under **Admin | Reports | Accounting**) now detail deposits and payments made to accounts.
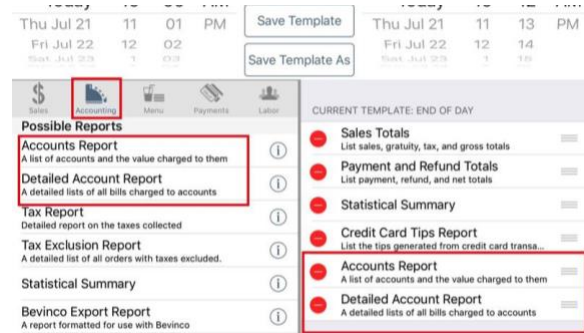
If you are using the **Customer Accounts** feature you should add these reports to your End Of Day report.
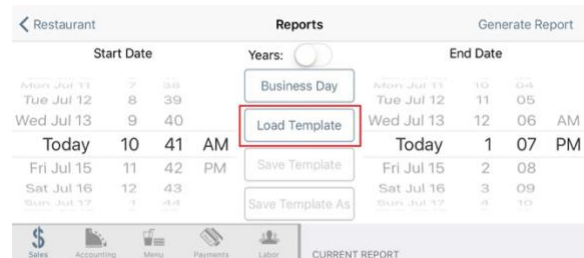
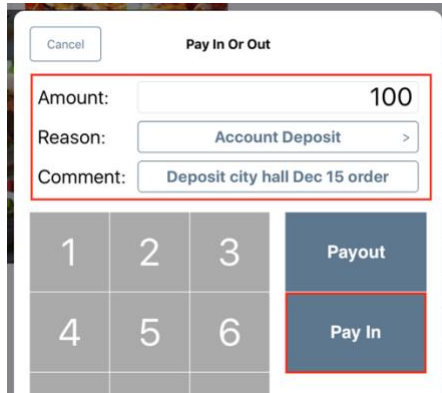Go to **Admin | Reports** and tap **Load Template**.


Select the **End of Day**.

Add the **Accounts Report** and the **Detailed Accounts Report** and tap **Save Template**. These reports will now be included with your End of Day.

If You Were Using Pay Ins

Previous to 8.4 we advised setting up **Pay Ins** as a way to reflect money coming into your venue for deposits. Because the **Accounts Report** and the **Detailed Accounts Report** now properly reflect funds paid in for a deposit, you should stop using Pay Ins.

You might also want to review which staff types were given access to Pay In/Payouts.
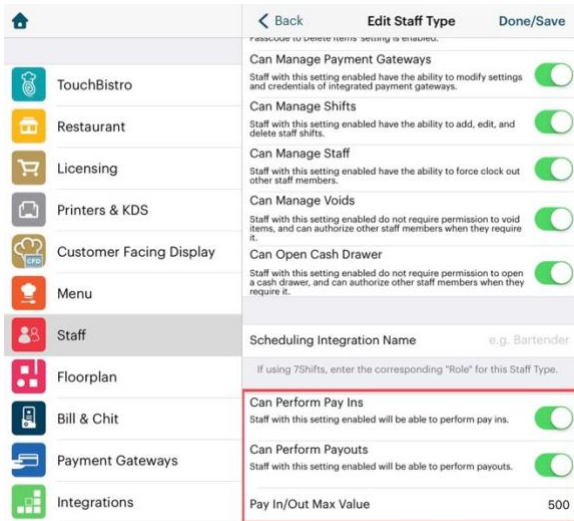
Review your **Staff Types** at **Admin | Admin Settings | Staff** and disable **Pay In/Payout** access for any staff type given this functionality simply to handle account deposits.

Setting Favorites
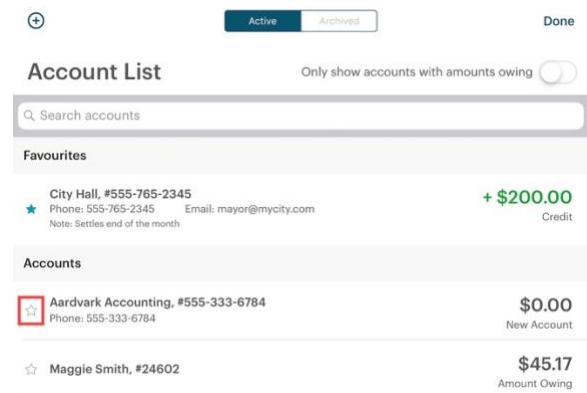
If you have customers that make frequent use of accounts and want those customer accounts to be at the top of the list when **Pay On Account** is selected, simply tap the account's star to move it to the favorites.

Archive Accounts

Previous versions allowed you to delete accounts. In 8.4 you can only delete accounts with no history (that is nothing has ever been charged to the account). Accounts with an account history can now be archived.
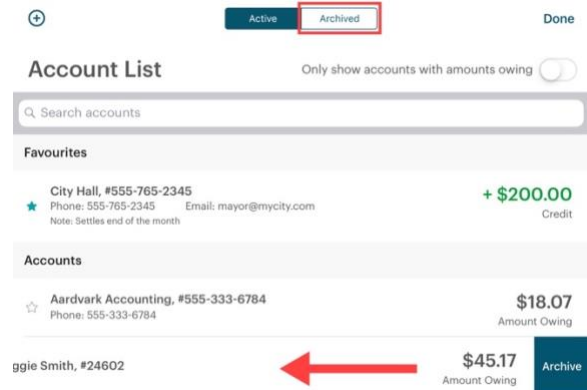
Simply left swipe on the account you wish to archive and tap **Archive**. Once archived, it will be available by tapping the **Archived** tab.

Capture Additional Account Information

When you create a new account, you can now enter a phone number and email address. We also prompt for the **Account Name** first. Previous versions prompted for the **Account Number** first.

The **Search** field on the **Account List** page will now let you search on **Account Name**/**Number**, **Email**, and **Phone number**.

Improved Account History Screen Layout

The **Account History** screen now offers improved layout and additional information. Bills with outstanding balances have their outstanding balances highlighted in red. As well, at the bottom left you can see contact information for the account.

Note: if you tap the star icon next to the **Account Name** across the top, you can favorite the account.

Paymentsense (UK)

TouchBistro now supports Paymentsense in the UK. TouchBistro's Paymentsense integration is available for Pro systems (multi iPad systems using the Pro Server). It allows mobile table-side payments using the iWL250 device.

## Reorganization of Payment Gateway Integrations

We have reorganized the payment gateway integrations based on specific availability by country (for example, PayPal is available for US venues only). **Other** includes integrations that are available for multiple regions (for example, Square is available for Canada/USA/UK/Australia) as well as integrations specifically available for the UK, LATAM, the Caribbean, and Australia.

Note: Cayan is now called **Tsys**. The integration name will be updated in the next version of TouchBistro.

Cloud Reporting

Since the release of 8.3, we've made some additional changes to our cloud portal's reporting.

Hourly Labor Cost Report
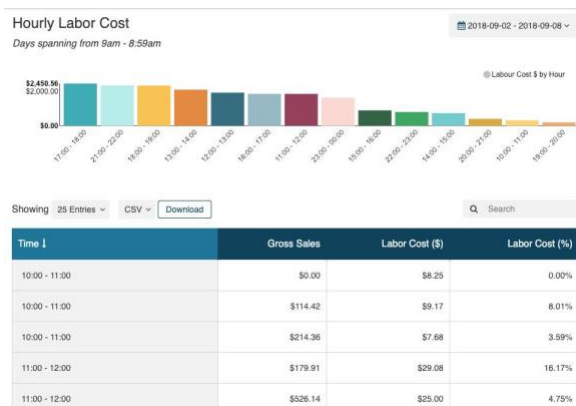
We've added a new **Hourly Labor Cost** report under the Labor section. The **Hourly Labor Cost** report shows, for the given time range, your hourly gross sales, your labor costs for that hour, as well as the labor cost expressed as an percentage of gross sales.

The bar chart at the top will total up labor costs for each hour of the reporting range. The bar chart arranges hours from the most costly to least costly.

Heat Map Hours

Previous to the release of 8.4, the **Heat Map** report displayed each day midnight to 11:59 pm. If your service hours extended past midnight, the gross sales were reported in the next day's column. As well, for venues that opened later in the morning or afternoon, one was required to scroll down to see key data.

The **Heat Map** now uses your configured **Service Time** start time (set under **Settings**) as the start of your heat map plot. Post midnight service hours are now properly reflected for the service day. As well, morning hours without data (post service hours) are now at the bottom of the heat map, ensuring relevant data is available without scrolling.

Heat Map Hours - Bill Start Time
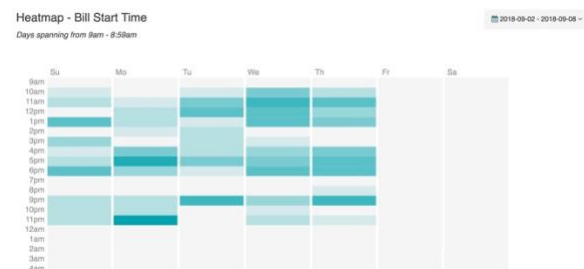
We've also added an alternative heat map. The **Heat Map - Bill Start Time** report is similar to the Heat Map report except it reflects sales from the time the bill was opened. The older Heat Map report shows you sales for the hour in

which the bill was closed. The **Heat Map - Bill Start Time** report can give you a better picture of which hours are busiest.

Overtime Reports

Overtime reports (**OT Details**, **OT Summary**) previously would only display a week's worth of data. You can now set various ranges for your overtime reports.