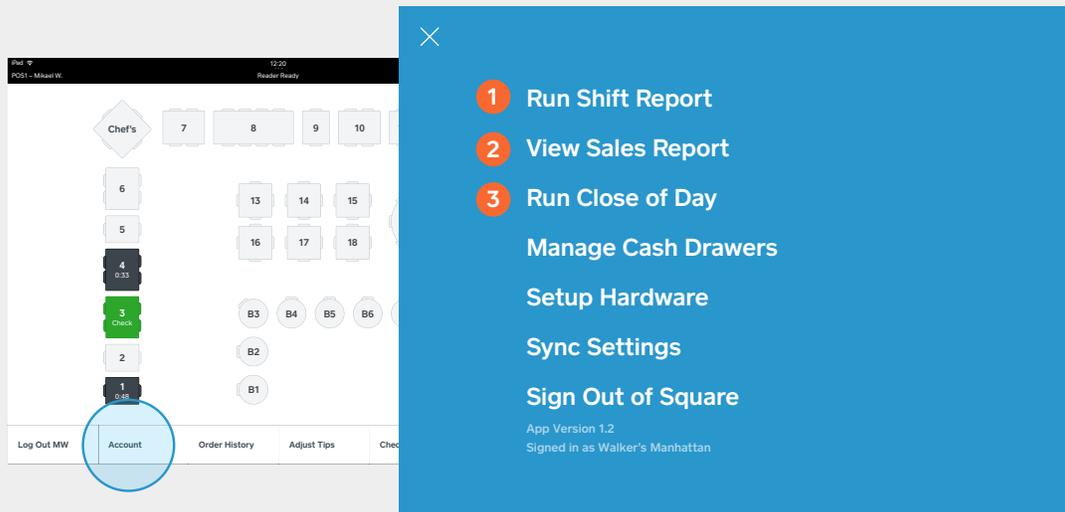**SQUARE FOR RESTAURANTS**

In The Weeds: POS Quick Tips

Common Terms

If you are new to Square for Restaurants, or just the restaurant industry in general, these are some terms that will help. Some are common, everyday terms used in restaurants, while others are unique to Square for Restaurants.

Categories	Categories are assigned to individual items in order to track them in Square for Restaurants' Reporting and Inventory. They also help determine in which order items will appear in their Display Groups.
Comp	A Comp is a check management function that allows you to apply a partial or full discount of either an individual item or an entire check, specifically when that discount results in waste or loss to your business.
Course	A Course is a step of service in which food or drinks are being brought to a table, usually in a specific order. For example, if a guest orders an appetizer and an entree, the appetizer would be placed in the First Course and the entree would be placed in the Second Course.
Device	Refers to iPad that you have Square for Restaurants downloaded on. Devices are important because many of the settings in Square for Restaurants are unique to the device level.
Display Groups	Display Groups contain items and can be added to any Menus in order to populate the POS grid with tiles. They are used to help organize items and can be used across multiplE Menus.
Fire	Fire is a coursing term that means a table is ready to receive a certain course. For example, if a table is finishing their First Course, a server will "Fire" the Second Course to let the kitchen know they can finish preparing and send the second course items.
Hold	Hold is a coursing term that applies to items that have been ordered, but which the guests are not yet ready for. Hold is the opposite of Fire.
Menu	Menu denotes a specific set of display groups and items that will appear on your POS for a certain period of the day, or a certain Shift. For example, Breakfast, Lunch and Dinner can all be separate menus.
Modifiers	Modifiers are sets of options that you can apply to individual items directly, or to entire Display Groups if you want whole collections of items to receive the same Modifiers. Modifiers can be priced or unpriced
Conversational Modifiers	A phrase used in Square for Restaurants to denote the system of combining verbs such as "add" and "extra" with the modifier ingredient for maximum ordering versatility. For example: "add + ketchup" or "no + lettuce".
Role	Role is how Square for Restaurants will designate an employee with access to a specific level of permissions. For example, the Server Role might not have as many permissions as the Bartender or Manager Roles.
Sections	Sections are created in the Floor Map section of dashboard, and are used primarily for reporting. You can add multiple sections to any floor plan.
Variations	Variations live on the item level and designate different sizes of a particular item with respective price and inventory quantities.

Close of Day and Shift Reports

1	Run Shift Report
2	View Sales Report
3	Run Close of Day

Manage Cash Drawers

Setup Hardware

Sync Settings

Sign Out of Square

App Version 1.2
Signed in as Walker's Manhattan

To locate your in-app reporting options, tap the **Account** button on the POS home screen.

When should I run a Shift Report?

This option is for individual tipped employees (like servers or bartenders) looking for a running total of their sales, open checks and Cash Owed.

> **Note:** The Cash Owed calculation is specifically for restaurants who want to pay out all employee tips in cash at the end of a shift. This way you'll know exactly how much of an employee's cash sales should go back to the house, or how much cash they're still due in order to account for their credit card tips.

When should I run a Sales Report?

This option is typically for managers with passcode access who would like to see a comprehensive report on today's sales organized by category and item, in addition to other rubrics.
Managers can use this screen to export the daily sales numbers via printout or email, or as shortcut access to Dashboard reporting features.

> **Note:** The Sales Report only shows transactions where the tip has been settled. Pending transactions will not be factored into the sales numbers, which may cause differences to the Shift Report.

When should I run a Close of Day Report?

This option is for a manager, at the end of a service shift or the entire day, to close out all open checks, close out the remaining cash drawers, and run the service report. You'll also be able to clock out any employees who are still clocked in! You can use Dashboard to customize which summary features must be completed in order to run the Close of Day report (e.g. closing out all open checks, closing the active drawers, etc.)

Device Settings Troubleshooting

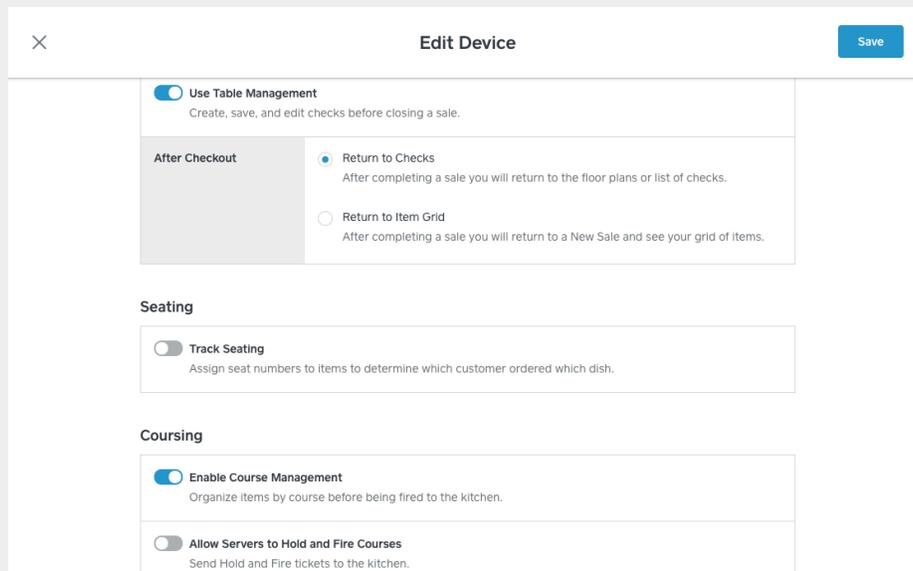Go to the web **Dashboard** then select **Points of Sale › Devices** and click/tap the device.

Why are my Gratuity settings different on different Devices?

Remember that each individual Device (iPad) has its own set of Device Settings that are configured independently. For example, just because Tipping is activated on your Dining Room POS, doesn't mean they will be activated on your Bar POS. So if you like the settings on one iPad and want to replicate them, you'll need to do it manually.

What is Offline Mode?

Offline Mode allows you to continue accepting payments in the event of wifi network disconnection. It's just a contingency (and hopefully you'll never have problems with your wifi) but we don't want to risk you missing out on any payments. When the internet is restored, all your payments are passed through to Square for processing. Note that some features will not work when offline, such as the Time Clock.

Device Settings Troubleshooting

Go to the web **Dashboard** then select **Points of Sale > Devices** and click/tap the device.

What is Table Management?

It's a suite of settings that allows you to create checks that you can then edit and add to over the duration of a meal (as opposed to a quick service order that is created and closed out almost immediately). There are several different Table Management features that allow you to customize each POS for more advanced workflows, such as:

- **Coursing** - Organize a check's items into "courses" that can be toggled between Fire and Hold so that you control both the pace of the meal and the order of kitchen preparation.
- **Seating** - Assign numbered positions to each guest so that anyone running food or drinks to the table knows exactly who they're for.
- **Floor Plans** - Display a timestamp and color key on individual tables so that you can see how far along they are in their meal.

Why aren't my Coursing options showing up in the Restaurants POS app?

If a certain feature isn't showing up on your POS, it's probably because that option needs to be turned on in Dashboard. But it's very simple to change these settings in the middle of service if you're missing something. Just find a manager with a passcode. They can access Dashboard through your iPad browser and the changes will take effect immediately!

Wifi Troubleshooting

Do I need Wifi to use Square for Restaurants?

Yes. Since we are a cloud-based system, you need to have a dedicated restaurant Wifi network. It's vital that the wifi network is set up properly so that your points-of-sale and printers can communicate reliably.

Are printer issues related to Wifi?

If the printers aren't receiving tickets or the iPads aren't syncing up with one another, it's most likely a wifi connectivity problem. There are a number of basic troubleshooting measures you can take to diagnose the problem and resolve this. The first step is verifying that both are on the same network.

How can I verify that my POS is on the correct network?

Go to the **Settings app** on your iPad (outside of the Square for Restaurants app). You should be connected to the appropriate restaurant Wifi network. But sometimes your iPad will connect to another familiar network accidentally. Reconnect to the appropriate network, if this is the case. If you *are* connected, but the internet still isn't working, try turning your wifi off (in your iPad Settings) and turning it back on again. Wait a few moments and then check the connectivity.

How do I check my hardware?

If this doesn't solve the issue, then take a moment to locate your router and double check that it's working properly. You can try turning off your router (with the switch, if it has one, or by unplugging the main power source) and then turning it back on a few seconds later. Check to see if all the wires are undamaged and properly connected, both to the router and to their respective sources.

> **Caution:** Unplugging your router means that all checks will stop syncing and printers will stop printing. Be sure to let your staff know to not enter any orders while you do this.

What if I've taken the above steps and the internet still isn't working?

If this still doesn't fix the connection problem, we recommend that you **contact your Internet provider**, because there could be network or infrastructure problems in your area that aren't related to your POS.
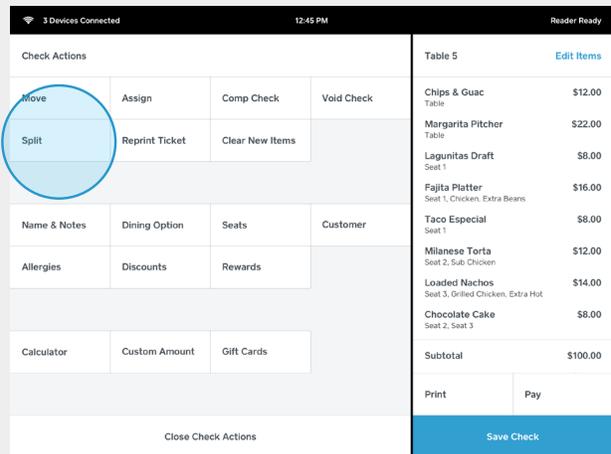
When should I use Offline Mode?

If for some reason the wifi does go down during a shift and you can't reconnect it, then you can utilize "Offline Mode" in order to continue processing payments. (If Offline Mode is already enabled in your Device Settings, then this will happen automatically.)

Splitting Options
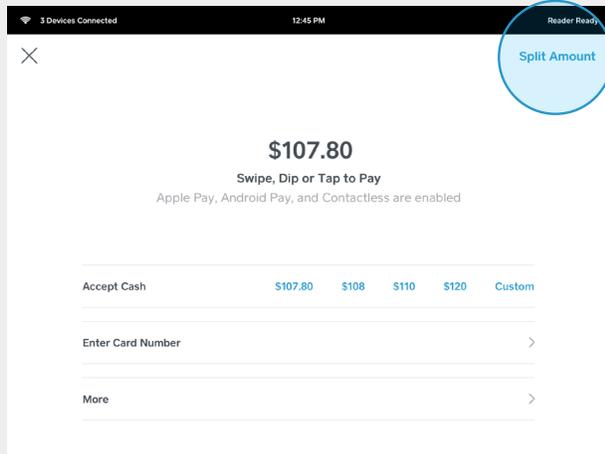


Splitting a Payment

Splitting a Check

What's the difference between splitting a check and splitting a payment?

Splitting a check is when you need to move specific items to different checks to be paid for separately. Use this when someone leaves early or guests want itemized bills, or as a step to separate comp/void items ("splitting off" items). This **Split** function can be found in **Check Actions**.

Splitting a payment is when guests want to pay for a portion of the bill. If you want to split a check by percentages or amounts (for example, a Guest hands you three credit cards and ask you to split the check three ways - ⅓, ⅓ and ⅓) you can do this by tapping **Pay** and then **Split Amount** in the top right corner.

> **Caution:** If you process a partial payment, and then CANCEL the payment because the Split was incorrect or you ran the wrong card, ALL of the payments on that check will be cancelled, and you'll need to run them again. Even if you have an authorization slip for the transactions that are correct.

Discounts
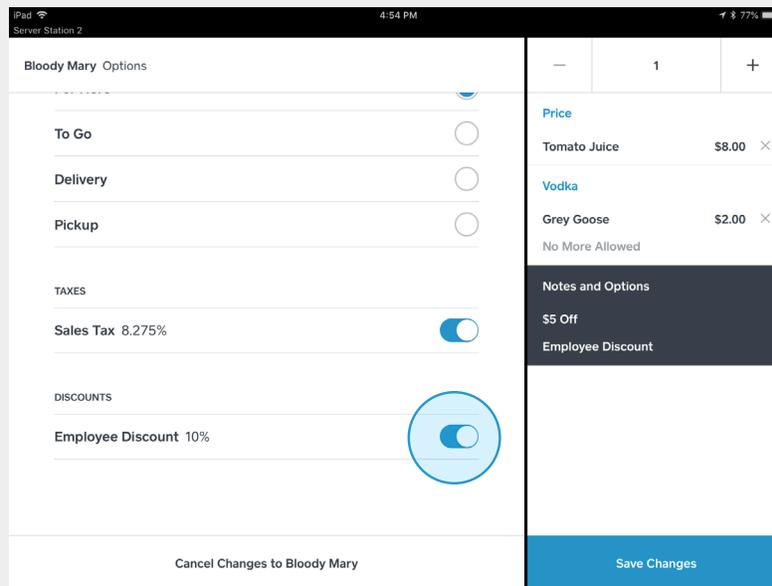
Apply Discounts by editing an item and tapping on **Notes and Options.**

How do I apply discounts?

In order to apply discounts, you'll need to create them in Dashboard. Once you have discounts created, here's how you can apply them:

- On **Dashboard**: When editing your grid layout, click/tap an empty space to add a Function Tile. Select a specific discount to sit in your item grid. On the POS: tap on the discount tile to apply it to the entire check.
- On the **POS**: Tap on the magnifying glass icon to search for a specific discount. Selecting a discount will apply it to the entire check.
- On the **POS**: Tap on an item in the cart and select Edit. Then tap on Notes and Options and select discounts to apply to that item.

Why is my Discounts Button not working ("grayed out")?

The Discounts button is meant to show you which discounts are currently applied to your check. So it will only be functional *after* you've applied specific Discounts.

Refund and Reopen
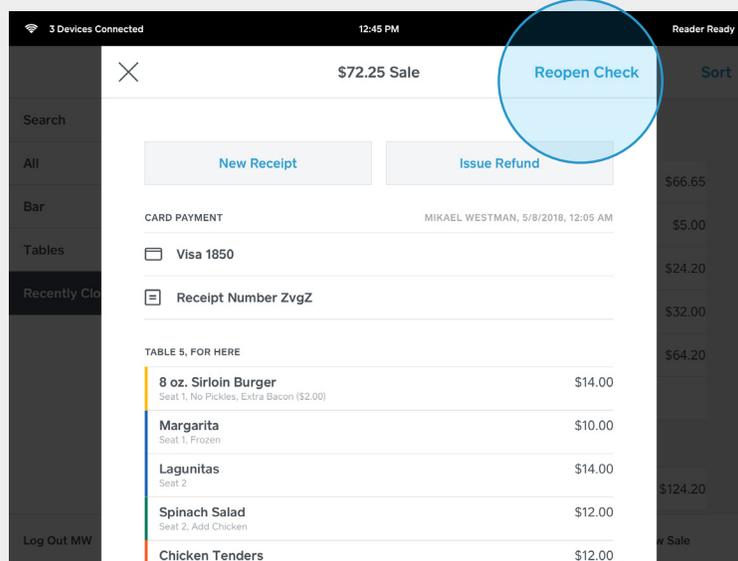
Can I Reopen a Closed Check?

Totally. Mistakes happen! If you've already run the cards for a check, but something went wrong, then there are a few easy steps for you to take in order to remedy it.

Caution: Make sure the guest is still in the restaurant before you reopen the check, because doing so will refund the payment and there's no way to recover it without the credit card information on hand.

Walkthrough

1. Tap on **Transactions** (at the bottom of your Floor Plan or Check List screen)
2. Find the transaction in question and tap on it.
   It will probably be at the top of your list of Transactions, but if it isn't, you can search by card number or Receipt Tracking Number (e.g. #a1B2)
3. Tap on **Reopen Check**.
   You'll see a button that says "Refund" but don't tap this because it won't give you an option to reopen the check.
4. **Confirm the Refund** (if you're sure) and you will be taken back to the Check screen.
5. **Re-process** the payment(s).

Are "Reopen" and "Refund" the same thing?

No, but they're connected. You can refund a check without reopening it but you cannot reopen a check without refunding. (Refunding is designed primarily for returnable merchandise, so it's not likely that you would often want to use this in a restaurant context, but it's there just in case).

Caution: if you reopen a check, you will also refund the payment and lose the authorization, so make sure that you only do this if you still have the customer's credit card or card information on hand.