

MicroSale POS Systems  
**VERSION 10**



NEW LOOK

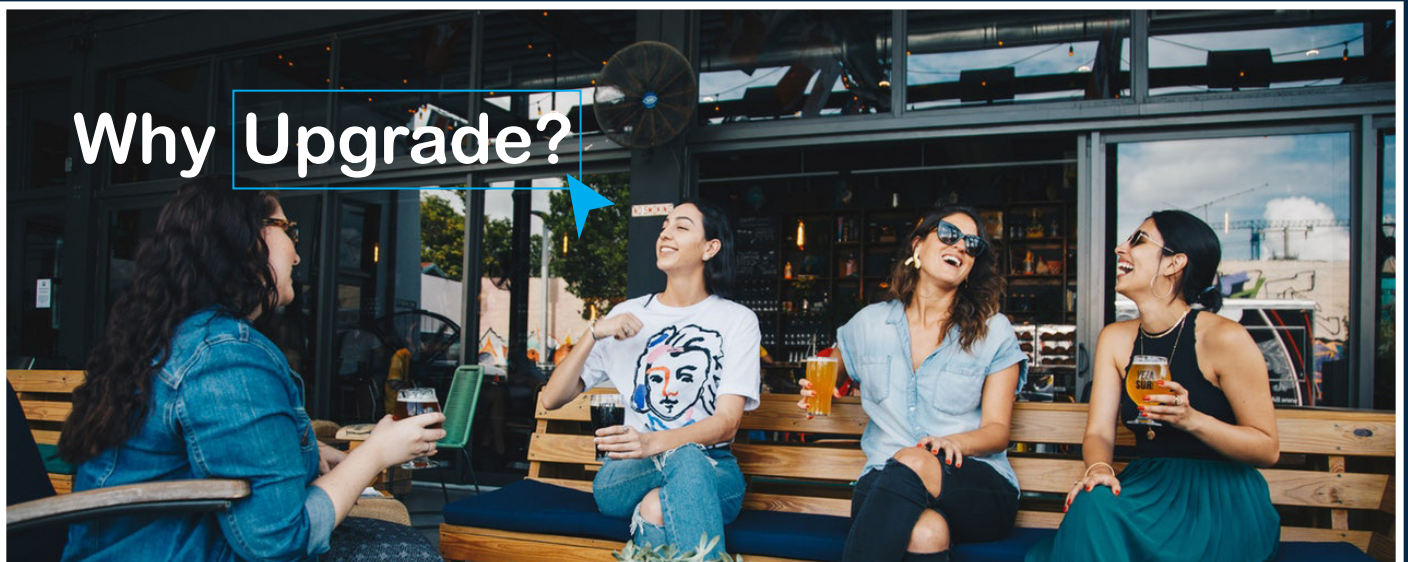
NEW TOOLS

NEW INTEGRATIONS

## Version 10 Upgrade Guide

Revised June 2020





### Version 10 Highlights

- ✓ New look
- ✓ Better performance
- ✓ Enhanced EMV technology
- ✓ Pay at the table
- ✓ Enhanced usability
- ✓ New integrations
- ✓ New functionality
- ✓ Streamlined setup

**Version 10 includes major updates across the entire platform. 10 has a fresh new look, stunning transformations and new ways to complete your tasks faster**

MicroSale Version 10 delivers an updated, modernized look packed with new tools and functionality. The changes are subtle enough that you can easily navigate through screens with minimal effort, but you'll notice a lighter design and newly optimized ways to get your job done faster.

The overall performance of the software is substantially faster than previous versions. Discover new tools to improve your operation such as pay at the table, EMV with offline credit card storage, new software for tablets, additional integrations and more.

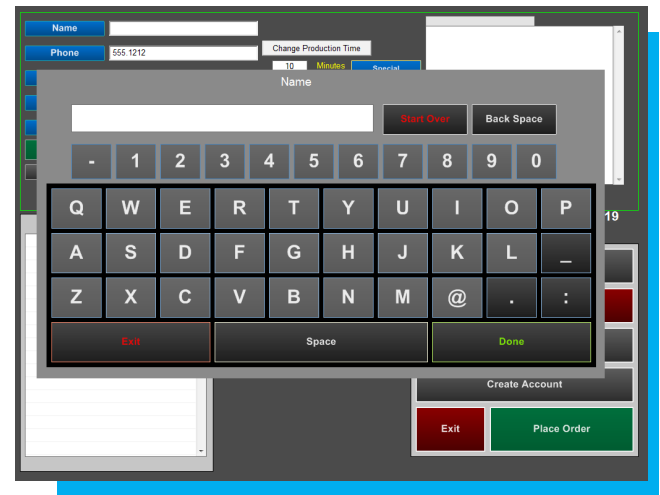
## Simple yet significant

Version 10 has a brand new, sleek look with updated tools to shorten your time spent on the computer

The new design offers a lighter feel with more prominent buttons and text geared for better usability on tablets and smaller screens. The sloping curves, concave gradients and floating text have been replaced with sharp edges, one-dimensional buttons and bold fonts.

The change is subtle enough that you can easily navigate through screens with minimal effort but you'll notice a modernized interface and improved button descriptions.

The menu setup areas include slight modifications that substantially improve the process of menu creation. Setup terminology is more consistent and tips have been added to more easily make changes to the system.



### Design Changes

- ✓ Updated buttons
- ✓ Expanded virtual check to see more items on one page
- ✓ Added space for more category buttons (14 appear on main screen)
- ✓ Added space for more function buttons (20 buttons appear on main screen)
- ✓ Added space for more modifier buttons (48 appear on one screen)
- ✓ Streamlined phone order management
- ✓ Simplified register options and reorganized options

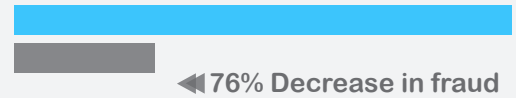


## Keep customers' data safe

Version 10 offers quick transaction speeds using EMV chip readers and provides secure, yet flexible mobile payment solutions

For merchants who have completed the chip upgrade, counterfeit fraud dollars dropped **76%**

\*usa.visa.com, May 28, 2019



### New Features

#### Hold card data on open tabs

Simply swipe a credit card to automatically start a tab and hold card data in the system. Close out customers quickly and prevent accidental unpaid tabs.

Available with Datacap's NETePay solution.

#### Take payments offline

Continue to process credit cards without the internet. Data stores locally in the EMV device and automatically processes when the internet is restored. Available with Datacap's NETePay solution.

### Integrated pay at the table

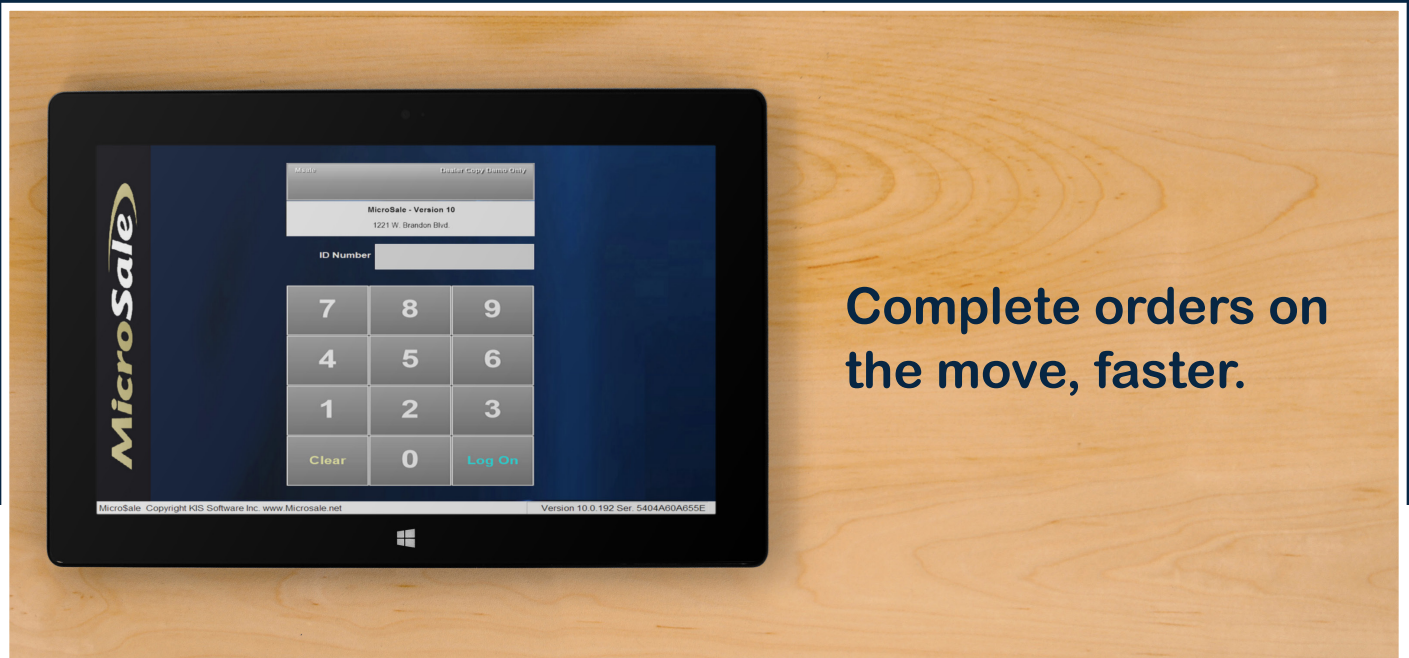
#### Process transactions right at the customer's table

Using a pay at the table device, your customers can review the bill, add a tip and settle their transaction without ever losing sight of their credit card.

- ✓ Accept contactless payments with Apple Pay, Android Pay and Samsung Pay
- ✓ Customers can easily review their bill via the payment device
- ✓ Increase productivity of your staff and protect your business from data breaches



## LIGHTER SOFTWARE APPLICATION FOR TABLETS



**Complete orders on the move, faster.**

**Built-in tablet version of software.** Version 10 now comes with a built-in tablet version of MicroSale. The Windows-based tablet application is substantially lighter, running up to 2x faster than the standard software. The application offers an identical user interface, providing users with a seamless experience when moving between tablets and workstations.

**Designed for order entry.** The tablet application allows order entry, payments, recalling checks and all other functionality needed for guest management. Back office management, time clock and scale integration has been disabled to reduce the size of the program and increase speed.

For the ultimate mobile experience, snap an Augusta chip card reader directly into the tablet.

### **A simple EMV upgrade solution is here.**

MicroSale Version 10 is integrated with the ID Tech Augusta virtual terminal technology (allowing manual card entry), bypassing the need for an external pin pad device.

The Augusta reader is a low cost, secure, compact EMV chip and stripe reader that plugs directly into a USB port on your existing POS unit.



## Simplified check management

Version 10 not only empowers you to get your work done faster, it gives you the tools you need to adopt new and more efficient ways to complete tasks.

### Quickly close out separate seats

You can now cash out individual seats directly from the order screen. This shortcut bypasses the need to go to the payment screen and pay out the seats individually.

### Add new checks on occupied tables

Multiple checks can now be assigned to a single table. This feature is perfect for communal tables or large parties with multiple servers. Instead of separating tickets by seat, servers can simultaneously enter items on the same table plus add and close tickets with ease.

### Void an open check on the order screen

You can now void all items off of an open check which automatically closes the check.

### Easily delete modifiers

You can now delete a modifier from a menu item with one tap. Simply select "Delete Item" followed by the item you want to remove.

### Faster course line entry

Course lines are now assigned to menu items to more easily manage course lines. If an item needs to be reassigned, simply tap "Change Course" to change the course of an item on the fly (i.e. App as Entrée or Entrée as App).

### Re-ring multiple drinks at once

Unlike repeat item which repeats a single item, Next Round gives you the ability to quickly ring in multiple drinks and modifiers in one tap.

### 86 items in the middle of a rush

Instead of logging into the back office, the 86 function lets you mark items out of stock directly from the order screen.

### Evenly split all items

Now split all items into multiple parts on separate seats in one tap. Enter how many times you want to share an item and it automatically splits and distributes everything by that denomination on separate seats.

### Suspend check

You can now suspend an open check, hold payment information on file and close it on a future date.

### QR Codes

A QR Code can now print on the bottom of a receipt. Designed for convenience stores that use a separate POS system for payment, the code automatically re-rings all items into the non-integrated point of sale system to accurately track inventory and quickly cash out customers.



### Server Pre-check & Berg Server Drink List

Using a Berg Liquor Control System, drinks entered from the server stations will now automatically populate on the bartender's terminal. The "Drink List" unlocks the Berg controls and allows the drinks to be made. When Berg detects that the drink is poured, the drink is removed from the list.



# New tools for more efficient phone and delivery management

### Quickly add tips for delivery drivers

At the end of each driver's shift, he or she can now enter all tips on individual checks in one place using the new shortcut, Close All.

### Easily reconcile driver reports

You can now label prepayments for UberEats, GrubHub and various online ordering vendors. The prepayments separate out sales on the driver report to more clearly reconcile driver's sales.

### Improve accuracy of driver delivery times

Mark Transaction Paid stops the delivery timer to more accurately determine how long it takes from order entry to actual delivery. This feature has been added for restaurants that close all checks at once at the end of a shift.

### Easily determine delivery from pickup

A toggle button has been added to the phone order screen to quickly filter between delivery and pickup orders.

### Make higher tips

To make it easier for customers to tip, a customer facing tip option has been added. On the payment screen, the cashier can rotate the touch screen which displays large, easy-to-use buttons to tip based on a percentage or custom amount.

### Reopen a phone order and keep payment attached to order

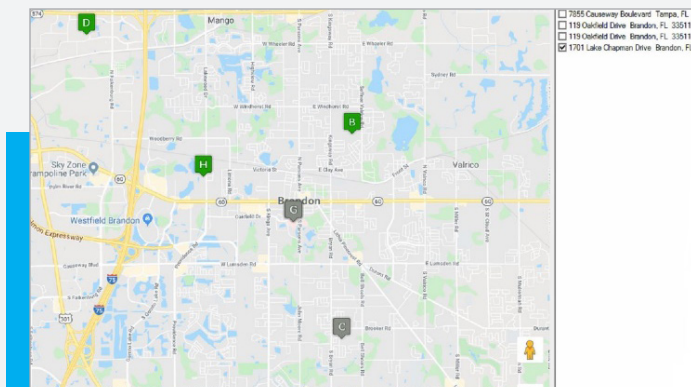
Phone management is now much more forgiving when mistakes are made. If an incorrect order is closed, you can now reopen the check and place it back into the active orders list while the prepayment stays attached to the order.

### Search transactions by address

You can now search transactions by delivery address when the customer name or check number may not be known.

### Pay at the door

Similar to Pay at the table, your delivery drivers can now take a payment device on deliveries. The device allows customers to review the bill, add a tip and print a receipt.



### Google Maps Integration

An integration to Google Maps is available in Version 9 and 10. Addresses auto-complete to prevent errors and increase speed.

Assign orders to a driver directly from the on-screen map to visually see stops closest together.

Using **integrated caller ID**, inbound calls from previous customers automatically drag in contact information, their address and the previous order to speed up phone orders.

## MORE ADDITIONS

### Simplified and improved system setup

Version 10 has eliminated dependencies on certain networking requirements and eliminated conflicting Windows settings.

These changes drastically reduces networking errors and makes terminal replacements significantly faster.

### Choose who receives reports

Instead of reports sending to every email address saved in MicroSale, you can now create groups of recipient. Groups may include “owners”, “shift leaders”, “general managers”, etc.

### Change the 'Phone Order' button name

You can now change the "Phone Order" button name. For example, you may want to see “Mobile Orders” instead of Phone Order.

### Prompt QTY for Repeat Item

A new register option has been added to prompt a quantity when selecting “Repeat Item”

### Punch In/Out Access by Job Code

You can now block the time clock functionality based on job code. For example, you can allow bartenders to clock in and out freely while forcing manager approval for cooks.

### Safe Report

The end of day prompts to enter the amount in the safe. This report provides additional accountability to help management better track all cash in the restaurant.

### Modify modifiers on demand

Users can now modify modifiers on demand. This feature allows users to call upon a modifier group connected to a modifier after the item is already entered. For example, if a salad is listed as modifier side choice, the user can now highlight the salad and further edit the item with ‘no tomatoes’, ‘extra dressing’, etc.

### Easily add price adjustments to modifier prefixes

Users can now set multipliers on prefixes. For example, a restaurant may charge 1.5x the modifier price for “Extra” or 75% of the price for “Light”.

### Customer Game Tracking

The customer game feature was created for an organization that sells games and scratch-off tickets. Selecting “Add Game Function” automatically adds a “Games” department and automatically creates a Games report using the Menu Items by Individual report. Users can view the report to see how many games are in stock and how many have been sold.

# compeat™

## CTUIT Compeat Integration

**Giving restaurants operational insights to maximize their profitability.**

MicroSale is now fully integrated to Compeat. Compeat is the only restaurant management software that provides integrated Accounting, Back Office, Workforce and Intelligence portfolio in one place.

A onetime integration fee enables the connection between MicroSale and Compeat. The integration opens the connection to send all POS data to Compeat. Please contact Compeat for third-party fees.



## Version 10 now comes standard with Employee Scheduler and Advanced Inventory.

### Employee Scheduler

Create schedules for employees based on forecasted sales. Create templates or create completely new schedules each week. View labor hours, labor dollars, and total number of shifts to make sure your schedule falls within your desired goals



#### Control the time clock

The scheduling software communicates with the time clock. If an employee is trying to clock in too early or too late, the system forces a manager to approve the shift

#### Track labor costs against projected sales

The software uses the pay rates of the scheduled employees to properly calculate labor costs vs projected sales

#### Create schedules in minutes

Create and save recurring work schedules with templates. Drag and drop employee names with each assigned job code on the schedule

#### Reduce overtime

The schedule prompts a warning if an employee is scheduled overtime or over their allotted hours

#### Automatically emails the schedule

When the schedule is published, it automatically emails to all employees that are scheduled for the week

### Inventory Management

MicroSale's Inventory program is powerful, easy to use and fully integrated with the POS system. Simplify your inventory tasks, create costed menu items with recipes to maximize profits and minimize losses

- ✓ Order directly from your vendors using EDI
- ✓ Monitor high usage items
- ✓ Update costs automatically from vendor pricing
- ✓ Input items with a tablet or barcode scanner
- ✓ Create invoices and purchase orders
- ✓ Compare ideal cost vs usage
- ✓ Automatically determines ideal price based on current food costs

## Order Entry

### Order Screen

- 14 categories are shown on main page
- 20 functions can now fit on order screen. 12 buttons are displayed to the right of the virtual check. If the remaining 8 additional functions are not assigned to buttons, the virtual check expands. When you add additional functions, the virtual check shrinks back to the default size with the functions placed below the virtual check.

### Modifiers (order entry side)

- Added an additional column and row of modifiers; a total of 48 modifier buttons fit on one page (previously 35) \*\*note, if you are using 'Invisible' modifiers to space out buttons, you may need to revisit your modifier screens and make adjustments\*\*

## Menu Maintenance

### Category Setup

- Shifted several attributes associated with the setup of category buttons
- Moved Alternate Description to the immediate right of the "Category Name". Renamed the function to "Alternate Button Name, Leave Blank for Default"
- Renamed "Mandatory" function name to "Mandatory Category, Item in this category will be required on check"

### Subcategory Setup

- Added functionality; you can now change a subcategory name with items assigned to the group; This allows you to easily change a name instead of reassigning menu items, deleting subcategory, adding a new subcategory and then reassigning the items again.
- Improvements have been made to this screen to make it more intuitive
- Changed Timed Event Section of subcategory screen; Added description to make it more understandable that the timed event section only controls the availability of the subcategory buttons

### Department Setup

- Removed Misc. printing setup; Misc Sale function has been removed to prevent tax issues. Instead of a misc sale item, create Open Item buttons such as "Open Food" with appropriate tax levels.
- Added Game Function; automatically creates a report to be referenced. Using the Menu Items by Individual report, restaurant management can see how many games are in stock and how many have been sold.
- Added descriptions to the Timed Event Section; helpful to see that timed events set here use the global price changes.

### Shift Levels

- Key name is now listed as "Prefix Name". This keeps the terminology the same from the Shift Level setup in the Menu Items and Pricing screen.
- Added hint to keep the prefix name short. This hint helps remind users to keep the name short so that the name does not cut off when a menu item is entered.
- Renamed Key Description to Name on Button. This allows you to expand the name of your prefix; such as SM as a prefix can be displayed as SMALL on the button.
- Headers have been added to the columns of saved shift levels. The left column is named "Prefix Name" and the right is "Category Assigned".

### Timed Event Setup

- Additional descriptions have been added; Hints user to make timed event name more descriptive, as only the timed event name is assigned to menu items. When the name includes the availability of the event, it makes it easier for the user to alter existing menu items. Such as making a name "HH M-F 4-7pm" instead of "Drink Special".
- Reinforces that price changes on timed events are Global; if the user needs to set the prices individually by item, it directs them to the Menu Items and Pricing screen.

### Modifier Setup

- Edit Modifier With; this function works similar to "Modify Item". This is beneficial for scenarios such as Side Salad modifier, where you want to add/edit the salad.

### Menu Items and Pricing

- Shift Pricing (bottom of screen, gray); Renamed header of "Prefix Name" to Prefix (Shift Name); Event Name has been renamed to Timed Event Name; Price has been renamed to Timed Event Price; Mod Price has been renamed to Mod Price Level
- Modifier area (top right, gray with yellow border); Removed labels of "Modifier #1, Modifier #2, etc, to 1, 2, etc; Added "First Matrix Stop" under the modifier names, to make it more understandable. The number of the matrix stop correlates to the modifier number
- The optional checkmark (to the right of the modifiers) now reads "Use with Modify Item"
- Timed Event area; Renamed "Use Timed Event With This Menu Item" to "Enable Timed Events"; Renamed "Available all of the time" to "Menu Item Always Available (unchecked works with timed events only)"

### Menu Item Button Layout

- Additional category buttons have been added for ease of use.
- Renamed "Alphabetical Order" to "Alphabetize Items on Buttons"
- Renamed "Restore Default" (bottom of screen) to "Restore All Buttons Back to Default Size and Placement". This should eliminate confusion between "Restore" and "Restore Default".
- Toggle functions have been made larger to more easily select buttons.
- Renamed "Restore" to "Restore Button Size"
- Renamed "All Categories" (under unassigned menu box) to "Show All Menu Items".
- Renamed "Main Category" (under unassigned menu box) to "Show Only This Category".

### Employee Maintenance

- Reformatted screen to make it easier to complete fields
- Employee ID has been moved under "Secondary Access Number". An added description has been added of, "Employee ID is only used for external payroll systems". This will eliminate confusion on users that think the Employee ID is the Primary Access Number.
- Renamed "View Terminated Employees" to "Filter Terminated Employees", as the function filters the employees using the "Last Name" field.
- Renamed "View Active Employees" to Filter Active Employees, as the function filters the employees using the "Last Name" field.

### Reports Menu

- On Reports Menu (main page) Updated buttons, buttons have not been renamed
- Sales Reports updated screen, important numbers have been highlighted
- Calendar has been updated
- Menu and Menu Sales > Menu Items by Individual
- Screen has been reworked
- Load from Menu File and Load from Sales History buttons have been moved to the top of the screen. Load from Menu File has been renamed to Load Menu Items from Menu Database. Load from Sales History has been renamed to Load Sold Menu items from Sales History
- The page up and page down buttons have been moved to the left of the screen
- Select All and Clear All have been moved directly under the menu item box
- Select by Category filter has been renamed to "Select By Individual Category". The "Select Category" Button has been moved to the right of the filter name
- To the right of the screen, an additional header has been added and reads "Option Filter Options".
- The two options in this area has been renamed and moved
- Sales By Individual has moved to the top and has been renamed to "Group Menu Items Sold by Employee"
- Group Items together has moved to the top and has been renamed to "Group Menu Items and Modifiers with Same Name Together".
- Mix Name has been moved under the "Additional Filter Options" area and has been renamed to Product Mix Report Name.

### Discount Setup

- Added hints/descriptions to make screen more intuitive
- Under "Name", a description has been added, "Name will appear on customer receipt and reports"
- "Combo's" has been renamed to "Choose Combo Items"
- The Multi Select Discount button has been moved into its own section (sectionalized by a blue box). It is now grouped with "Items Needed to Match Per Transaction". Includes a description or key (highlighted in blue) that reads "0=Entire Check, 100=Multiple Items can be selected for the discount, Custom Number entered requires that specific number of items to be selected for the discount to activate".
- The Time/Availability setup has been altered
- The label of "Coupon Not Available on Checked Days" has been renamed to "Select days when discount is NOT available". This change should alleviate some confusion about qualifying days

# DESIGN CHANGELOG

## Register Options

All relevant options are now grouped together to clearly see what settings are available within the software. Each section now includes headers to quickly jump to the group of options you are looking for (such as audit settings, guest check settings).

The goal is to make it easier to find the options you need while keeping all terminology familiar to you.

- You will still access register options by Managers Menu >Register Setup >Terminal Configuration >Register Options
- Close open windows by clicking anywhere in the window
- Save and Exit has been moved to the top right of the Register Options screen

### Printer/Cash Drawer (on toolbar)

The options on this page have been consolidated to one page and regrouped with headers. Options are grouped by Receipts (Guest Check), Remote Printers (Kitchen/Bar Tickets), Report Printing and Cash Drawer Options

### Modifier Setup (on toolbar)

This has been renamed Menu/Modifier Setup

All options relating to how menu items act as well as modifiers are now consolidated into this section.

The following options were moved from Misc Options: Menu items grouped together, menu items in order as entered, prompt quantity, prefix dept name, menu meal periods, timed event prefix, hold price shift, disable modifier price adjust and bar code requires qty.

- Scale Weight By was moved from Terminal Setup
- Berg Liquor System settings have been moved from Misc Options to Menu/Modifier Setup

### Time Keeping (on toolbar)

The following options have been moved from Misc Options: Turn on finger print on this station, finger print is required to log on to station, and turn on schedule enforcement

- Enable Alerts has been moved from Time Keeping to Terminal Setup

### Terminal Setup

The terminal setup page offers options that are set by individual terminal (The Global Setup section sends out options globally across the network while the Terminal Setup section allows you to set up each terminal differently)

The following options have been moved from Misc Options: 24 hour operations, enable employee discount, disable daily close, disable random messages, daily close required turn on automatic service charge, disable menu/employee edits, update prices on order screen, disable void check with closed audit, turn on OfficeAnywhere, turn on quantity bar, employee must be on clock to place order, turn off seats and trays, disable ping for internet servers, I am a tablet, employee access is by job code, and memberships

- Enable Alerts has been moved to Terminal Setup from Time Keeping
- Scale Weight by has been moved from Terminal Setup to Menu/Modifier Setup

### Email-Export-INI (on toolbar)

The Email Setup Screen has been completely revamped.

From a single screen, you can now setup email, create email groups and assign email addresses to nightly email reports.

The automatic email reports section was previously under "Closing Report" which offers settings pertaining to the printing of reports after the close out is ran. The automatic email reports are now directly under the email addresses that will be assigned to the email reports to make it easier to see exactly what reports are emailing nightly.

### Misc Options (on toolbar)

- This has been renamed Wait List
- Re-homed all options except Reservations and Wait List

### Phone Orders (on toolbar)

All phone order options have been consolidated to one screen. Ambiguous options now have explanations under each option name. Delivery Zoning has been added to the same page, placed within the Delivery Settings section.

### Quick Service

The Quick Service options have been reorganized with headers to more quickly find what you need, such as Order Screen Options, Drive Thru Options and Quick Service Audit Options. All options under "additional options" were moved to the main quick service page

- Cashier can start their own audit has been moved from Misc Options to Quick Service

### Full Service

The Full Service options have been reorganized with headers to more quickly find what you need, such as Credit Card/EMV Settings specifically used for full service environments, Order Management Settings, Full Service Printer Settings specifically used for full service environments and more.

The Additional Options button is still used and is organized by Order Screen Settings, Audit Settings and Tip Settings

**Kitchen Video, Kiosk, House Accounts, Credit Card, Misc., Global Setup sections remain unchanged.**

**MicroSale continues to evolve throughout the lifetime of each version.**

MicroSale makes updates within each version of software for 2-3 years to minimize costs & maximize the value of each upgrade.

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**MicroSale is sold and supported by certified resellers throughout the United States. To find a local representative, please contact us at:**

**Toll Free: 844-454-4900**

**Local: 813-681-1875**

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