



TASTE HOW MUCH WE CARE™

CULVER

Franchising System Inc.

Store Management Workstation Manual

CULVER FRANCHISING SYSTEM INC.

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Table of Contents

<i>What is Store Management Workstation</i> _____	<i>1</i>
<i>Downloading Store Management Workstation</i> _____	<i>1</i>
<i>Logging Into Store Management Workstation</i> _____	<i>2</i>
<i>Site Operations</i> _____	<i>3</i>
Manage Shifts _____	3
Daily Processing _____	3
Host Contact _____	3
Edit Deposits _____	3
Edit Timecards _____	3
<i>Site Reporting</i> _____	<i>4</i>
Financial _____	4
Sales Mix _____	4
Sales Activity _____	4
Clocked In _____	5
Discounts/Coupons _____	5
Labor Percent Sales _____	5
Credit Batch _____	5
Site Summary _____	6
Daily Timecard _____	7
Timepunch Adjustment Report _____	7
Item Discount Report _____	7
Speed of Service Report _____	7
Daypart Activity Report _____	8
Credit Report _____	9
Audit Log Report _____	9
Pay Rate Report _____	10
Price Override Report _____	10
<i>Utilities</i> _____	<i>10</i>
Terminal Management _____	10
Substitution Item Pricing _____	10
Relay Generation _____	14
EJ Viewer _____	16
Item Description Editor _____	19
Log Out _____	19
Exit _____	19
<i>Contact Information</i> _____	<i>19</i>
<i>Index</i> _____	<i>20</i>

Introduction to Store Management Workstation

This chapter will introduce you to the logging into Store Management Workstation and navigating through the interface.

What is Store Management Workstation

Store Management Workstation allows access to several applications for managing some of the features of the POS, which include running daily processing, generating reports, and accessing utilities. The applications for Store Management Workstation are run through the Site Controller. The Store Management application is divided into the following areas:

- **Site Operations**
- **Site Reporting**
- **Utilities**

ICON KEY

	Valuable Information
	Move Ahead
	Special Attention



This document will use the following abbreviations

Downloading Store Management Workstation

If you have SMW installed, you may skip this section.

SMW is available on the extranet in the Information Center under POS-Computer support, SMW(Store Manager Workstation). Right-click on SMW Install File – Very Large and select **Save Target As** from the popup that appears. Save the file to an easily accessible location on your computer such as the desktop. The file may take some time to download and when it is finished you'll have a file called SMW_SiteManager_PreInstall_Culvers.exe saved to the location that you selected. Save the Install Guide in the same manner as the Install File. Please preview the Install Guide prior to double clicking on SMW_SiteManager_PreInstall_Culvers.exe to install SMW. When prompted for a server IP address, use 192.168.1.253. If you receive error messages or have other questions on the installation, please call RDS or CfSi IS support team.

Logging Into Store Management Workstation

After successfully installing Store Management Workstation onto your office PC, you will find the Store Management Workstation icon (Figure 1.1) has been added to your computer desktop.

SMW – Store Management Workstation

POS – Point of Sale



FIGURE 1.1
SMW Icon

1. Double click the icon to start the Store Management Workstation application.
2. Enter your **POS PIN** in the password box (Figure 1.2)

FIGURE 1.2
SMW Log In Box

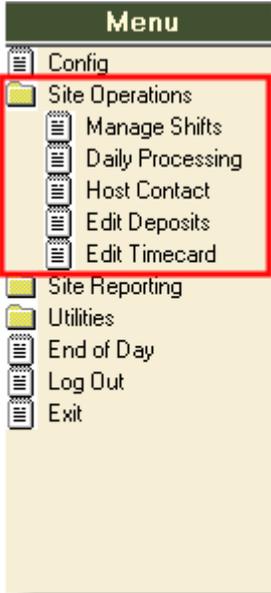
⚡ **POS PIN number is not the same as Clock-In PIN. Check the Radiant back office for this number. The Clock-In PIN must also be associated with an employee who has the Access All POS Security Role.**

📁 If you would like to find or change your POS PIN in the Radiant Back Office, navigate to the following location. **Workforce Management → Employee Setup → POS User Setup →** (This is available under the Related Links tab). From the **POS User Setup** screen look for the **POS PIN** field. (Figure 1.3)

FIGURE 1.3
POS User Setup shown in the Radiant Back Office

POS User Setup -	
POS User Configuration	POS Security Role
Employee Member Id	TAI
POS PIN	801916
Clock In PIN	3980
Operator Mode	Cashier - Clock In Not Required
Primary Job	A Team Member
MSR Number	
Safe Drop Alert Amount	

⚡ **All reports and utilities in SMW are available to all employees who have the Access All POS Security Role. We will be able to restrict access to the Pay Rate Report after the upgrade to 6.2 back office.**



Site Operations

The **Site Operations** folder has the same options as the **Site Operations** button on the POS. These options will be briefly covered in the following section.

Manage Shifts

Selecting **Manage Shifts** gives the following options:

- Open Shifts, Close Shifts, Force Signouts
- Add/Edit the following items: Loans, Pickups, Paid Ins, Paid Outs
- Print Operator Shift Report (Daily Financial Report)

Daily Processing

Selecting **Daily Processing** gives the following options:

- End current business day
- Start next business day

Host Contact

Selecting **Host Contact** gives the following options:

- View logs
- Initiate download from Radiant Enterprise
- Initiate all exports to Radiant Enterprise

Edit Deposits

Selecting **Edit Deposits** gives the following options

- Add Deposit
- Edit Deposit (If entered originally using SMW or the POS)

Edit Timecards

Selecting **Edit Timecards** gives the following options

- Add clock-ins (clock-ins, breaks, meals)
- Add clock-outs (clock-outs, breaks, meals)
- View time punch details

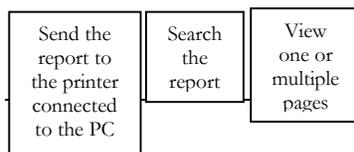
⚡ **There are certain limitations that apply when using SMW to add time punches. They are as follows:**

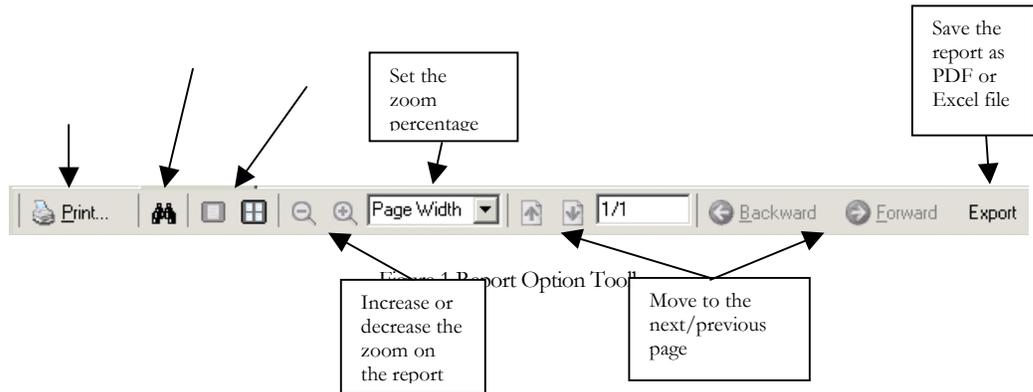
- Punches cannot be edit once added (either at the POS or SMW)
- You cannot add new punches after the current time, or for a future day.
- You cannot add punches for previous days.



Site Reporting

The **Site Reporting** folder has many of the same options as the **Site Reporting** button on the POS. These options will be outlined in the following section. To run reports in SMW you will make your report parameter selections and then click the **Generate Report** button. Once the report has been generated you will see the report options toolbar as described below.





Financial

Description: The **Financial** task* allows you to view the Operator Shift Report (Daily Financial) for the last 21 days. You can view any of the shifts that were available for each POS each day.

Application: The Operator Shift Report is identical to the Operator Shift Report that is printed when closing a POS. This report can be used to help settle drawer totals. Some key items to view on this report are as follows:

- **Cash Due** – This should be the amount of money that is currently in the drawer. This includes all cash, credit, check, and gift card/certificate redemptions.
- **Paid Outs** – This is a good field to reconcile against any receipts that coincide with the Paid Out reason.

*Task - The word task will refer to each item on the menu preceded by the  icon

Sales Mix

Description: The **Sales Mix** task allows you to view the Sales Mix Report for the last 21 days. You can view both single item, and item group totals on this report.

Application: The **Sales Mix** report is identical to the Sales Mix report that can be printed from the POS. Use this report to track any current promotions that you may be running in your restaurant.

Sales Activity

Description: The **Sales Activity** task allows you to view your gross sales for the last 21 business days. You can view your sales broken down per register, or all registers. You can also view the report in 15, 30, or 60 minute intervals.

Application: The **Sales Activity** report is identical to the Sales Activity report that can be printed from the POS. Use this report to check on your sales throughout the day.

Clocked In

Description: The **Clocked In** task allows you to view all currently clocked in employees. This will include all currently clocked in employees, and any employees

who currently have an unpaired punches from another date (a clock in with no clock out).

Application: The **Clocked In** report is identical to the Clocked In report that can be printed from the POS. Use this report before you run your daily processing on the POS. This will allow verifying that all employees have punched out for the day.

Discounts/Coupons

Description: The **Discounts/Coupons** task allows you view all coupons and discounts that were utilized on the POS. This report can be run for a specific register, or for all registers for the last 21 days.

Application: The **Discounts/Coupons** report is identical to the Discounts/Coupons report that is available from the POS. This report should be ran daily and checked for items that may seem out of the ordinary.

Labor Percent Sales

Description: The **Labor Percent Sales** task allows you to view all your restaurant's labor and net sales information for the last 21 days. This report can be run for 15, 30, or 60 minute intervals.

Application: The **Labor Percent Sales** report is identical to the Labor As A Percent Of Net Sales report available on the POS. It is a good practice to periodically check this report throughout the day. This report is not meant to give exact figures for labor data, only approximate amounts.

 The labor cost calculated in this report is found by using an hourly employees wage multiplied by the number of hours worked for that period. The labor cost **does not** account for items such as breaks, meals, or overtime. Salaried employees are also not figured when calculating the labor cost.

Credit Batch

Description: Culver's does not utilize credit batches with the Radiant POS to authorize credit transactions.

Application: Culver's does not utilize credit batches with the Radiant POS. You should never see any information in this report.

Site Summary

Description: The **Site Summary** task allows you to view the Daily Site Summary Report. This report shows several key items such as Net Sales, Transaction Details, and Discounts and Coupons. This information can be viewed for up to the last three months. (*Figure 2.1*)

FIGURE 2.1
Site Summary Report
as viewed from
SMW – Site
Summary

Daily Site Summary Report

Report Time: 2/20/2006 3:03:53 PM

Business Date: 2/17/2006

Sales Summary		
Cnt	Today	% of Gross Sales
	Gross Sales (without tax)	\$3,740.44
2	Refunds (-)	\$8.78 0.23%
	Item Sales (=)	\$3,731.66 99.77%
125	Total Reductions	\$193.99 5.19%
99	Discounts (-)	\$149.07 3.99%
26	Coupons (-)	\$44.92 1.20%
0	Auto detect discnts (-)	\$0.00 0.00%
	Net Sales (=)	\$3,537.67 94.58%
	Sales Tax (+)	\$190.73
	Net Sales plus tax (=)	\$3,728.40
472	Transaction Count	
	Avg. Net sales/transaction	\$7.50
	Avg. Item sales/transaction	\$7.91
Taxable (Net)		
	Non-Taxable Sales	\$135.50 3.62%
	Taxable Sales	\$3,402.17 90.96%
Transaction Details		
5	Tax exempt transactions	\$10.18
14	No Sale Transactions	
137	Item Deletions before total	\$407.00
1	Item Deletions after total	\$4.09
0	Item Deletions after tender	\$0.00
1	Cancelled Transaction	\$9.48

Credit Card Tenders		
Type	Cnt	Amount
Visa	0	\$0.00
Mastercard	0	\$0.00
Amex	0	\$0.00
Discover	0	\$0.00
Gift Cards	0	\$0.00
Other	0	\$0.00

Paid Outs by Reason code	
Reason	Amount

Discounts and Coupons		
Name	Cnt	Amount
FSI-\$1 Off Basket	1	\$1.00
Promo Turtle	1	\$3.49
FSI-\$1 Off Dinner	2	\$2.00
Promo Item (Selection)	2	\$5.98
Promo Sundae	4	\$9.96
\$1 Off	5	\$5.00
Promo Cake, Dish, Waffle	11	\$17.49
16week/60hour Training	5	\$18.31
Employee 50%	5	\$11.71
Senior	19	\$14.02
10%	48	\$50.33
Manager 100%	5	\$26.49
VIP - 25% - MGR	17	\$28.21

Cash Reconciliation		
Cnt	Today	
Cashier Over/(Short)		
	Net Sales (incl tax)	\$3,728.40
0	Paid Ins (+)	\$0.00
0	Paid Outs (-)	\$0.00
0	Gift cert sold (+)	\$0.00
0	Gift card sold (+)	\$0.00
	Total Responsibility (=)	\$3,728.40
	Pickups	\$0.00
	Loans (-)	\$0.00
	Total Accounted For (=)	\$0.00
	Cashier Over/(Short) (=)	-\$3,728.40
Safe Over/(Short)		
	Pickups (+)	\$0.00
	Loans (-)	\$0.00
	Safe Adjustment (-)	\$0.00
	Total Responsibility (=)	\$0.00
	Non-depositable Total	\$642.86
49	Credit	\$602.37
6	Culver's Card	\$40.49
	Deposit Total (+)	\$0.00
	Total Accounted For (=)	\$642.86
	Safe Over/(Short) (=)	\$642.86

Application: The Daily Site Summary Report is similar to the Daily Financial Summary Report in the Radiant back office. Use this report at the end of the day to check for any items that may seem out of the ordinary.

✎ **Certain items appearing under the Cash Reconciliation field will not have any values unless you are currently using the POS to enter cash reconciliation or deposit numbers.**

Daily Timecard

Description: The **Daily Timecard** task allows you to view the time punches and hours for a specified date range up to 23 days from the current date. You can view either single employees or all employees.

Application: The **Daily Timecard** report can be used to quickly see how many hours an employee has worked for the current week or pay period.

Timepunch Adjustment Report

Description: The **Timepunch Adjustment Report** will list adjustments made to timepunches on the POS. Most Culver’s restaurants do not do time edits on the POS as this limits availability of ongoing labor information in the back office.

Application: The **Timepunch Adjustment Report** report will allow you to see when adjustments are made to employee’s punch events and who made the adjustment.

Item Discount Report

Description: Culver’s uses transaction level discounts, so this report will be empty.

Speed of Service Report

Description: The **Speed of Service** report will report your transaction count, order, line, service and total times in minutes and seconds by 15 minute increments throughout the date range specified. The report options available are **Cashier** format that will allow you to select a cashier to report on or **Destination** format that will allow you to select one or many destinations to report on.

Time	#Tran	Average Times		
		Order	Delivery	Total
10:15 AM	1	4:00	0:00	4:00
10:30 AM	5	0:57	6:55	7:52
10:45 AM	12	0:51	13:13	14:04
11:00 AM	20	1:21	9:55	11:16
11:15 AM	24	3:59	5:41	9:40

Figure 2 Speed of Service Report Cashier Format

Destination(s): *Park, -Served at D/T

Time/Volume	#Tran	Average Times			
		Order	Line	Serve	Total
10:15 AM					
Low	1	0:16	3:36	0:08	4:00
High	0	0:00	0:00	0:00	0:00
10:30 AM					
Low	2	0:07	0:35	2:21	3:03
High	1	0:07	1:06	2:03	3:16
10:45 AM					
Low	1	0:27	1:03	2:22	3:52
High	0	0:00	0:00	0:00	0:00
11:00 AM					
Low	3	0:24	0:36	3:08	4:08
High	4	0:15	1:56	2:17	4:29
11:15 AM					
Low	10	0:28	0:20	2:24	3:12
High	1	0:35	1:11	3:24	5:10

Figure 3 Speed of Service Report - Destination Format

Application: The **Speed of Service** report can be run at the end of each shift to identify strengths and weaknesses in the team’s speed performance in the drive thru. Note: we cannot accurately calculate line or service times for front counter orders so it is recommended that you don’t use those cashiers or destinations.

Daypart Activity Report

Description: The **Daypart Activity Report** task allows you to view the Daypart Activity Report for any range of days up to 23 days ago. This report displays sales and transactions by destination along with the average check for each destination.

Daypart Activity Report - Wage rate of \$7.50 used

From Sunday, December 17, 2006 through Sunday, December 17, 2006
 Report Time: 12/19/2006 5:46:13 AM
 Business Unit: Middleton, 005 Middleton

Daypart/Destination	Transaction Count	Net Sales	Check Avg	Labor Prod.	Labor %	Cumulative Totals				
						Transaction Count	Net Sales	Check Avg	Labor Prod.	Labor %
*Dine In	193	1,811.03	9.38			193	1,811.03	9.38		
*Park	257	2,051.85	7.98			257	2,051.85	7.98		
*To Go	56	548.73	9.80			56	548.73	9.80		
Call In	3	28.35	9.45			3	28.35	9.45		
Eat In - Kiosk	3	30.52	10.17			3	30.52	10.17		
-Served at Counter	84	246.66	2.94			84	246.66	2.94		
-Served at D/T	36	159.62	4.43			36	159.62	4.43		
To Go - Kiosk	1	11.56	11.56			1	11.56	11.56		
Outside of Daypart	633	4,888.32	7.72	0.00	0.00%	633	4,888.32	7.72	0.00	0.00%
Report Totals:	633	4,888.32	7.72	0.00	0.00%					
*Dine In	193	1,811.03	9.38							
*Park	257	2,051.85	7.98							
*To Go	56	548.73	9.80							
Call In	3	28.35	9.45							
Eat In - Kiosk	3	30.52	10.17							
-Served at Counter	84	246.66	2.94							
-Served at D/T	36	159.62	4.43							
To Go - Kiosk	1	11.56	11.56							

Application: The **Daypart Activity Report** can give you insight into how your sales and transactions break down by destination.

✈ **The dayparts and labor information require additional configuration and will not be available until after the upgrade to 6.2.**

Credit Report

Description: The **Credit Report** will give you immediate details on every credit and gift card transaction run through the registers. You can view the report using many search options such as card type, approval status, online/offline status, dollar amount, register used, and last 4 digits.

Customer Name	Business Date	POS #	Tran #	EPS Tran #	Card Description	Card Number	Exp Date	Approval Code	Amount	Batch #	Tran Type	Credit Type	Authorization Type	Epsilon Status	Epsilon Detail
SIMONSEN/MOLLIE R	12/18/06	22	1261635	394133	Mastercard	0538	6/8	061302	\$7.59	20	Sale	Credit	Online Credit	Approved	

Application: The **Credit Report** can be used to see whether transactions are being taken in offline or store and forward mode, whether transactions have been approved, and whether refunds were done for credit transactions. It also provides the approval code if you need to call Concord to reverse a charge or re-apply a charge.

Audit Log Report

Description: The **Audit Log Report** will list the date, time, manager and transaction number of each register event that requires a manager swipe. You can view the report by manager or by security action.

Date	Time	Term #	Tran #	Operator	Manager	Security Action
12/18/06	12:37:54 PM	1	1262061	One zzReg	Heidi Pease	Discount (High)
12/18/06	1:53:13 PM	1	1262177	One zzReg	Sarah Elliott	Discount (High)
12/18/06	2:34:15 PM	1	1262226	One zzReg	Justin Thornton	Discount (High)
12/18/06	2:55:18 PM	1	0	One zzReg	Connie Vacho	Close Shift
12/18/06	4:02:36 PM	1	1262307	One zzReg	Sarah Elliott	Coupon (High)
12/18/06	5:03:17 PM	1	1262366	One zzReg	Matthew Mengelt	Discount (High)
12/18/06	5:41:06 PM	1	1262405	One zzReg	Matthew Mengelt	Discount (High)
12/18/06	6:04:40 PM	1	1262435	One zzReg	Matthew Mengelt	Discount (High)
12/18/06	7:01:19 PM	1	1262525	One zzReg	Matthew Mengelt	Coupon (High)
12/18/06	9:39:39 PM	1	1262662	One zzReg	Connie Vacho	Discount (High)
12/18/06	10:03:00 PM	1	0	One zzReg	Matthew Mengelt	No Sale
12/18/06	10:03:04 PM	1	0	One zzReg	Matthew Mengelt	Close Shift
12/18/06	11:03:33 AM	2	1261857	Two zzReg	Connie Vacho	Price Override (High)
12/18/06	12:13:16 PM	2	0	Two zzReg	Mary Frey	Retrieve And Refund

Application: The **Audit Log Report** can be useful in loss prevention initiatives to determine which manager approved certain security events.

Pay Rate Report

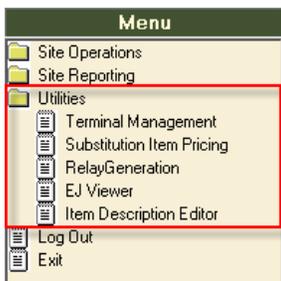
Description: The **Pay Rate Report** allows you to view a list of all employees and their current rate for each assigned job.

Application: The **Pay Rate Report** can be used when state wage increases require you to update wages for many crew members. It can also be used to determine employee's wage prior to their review and to verify that wages are configured correctly in the back office.

Price Override Report

Description: The **Price Override Report** will list each item that you have configured substitution pricing for. It will show the default price that is set up at the corporate level and the price that is configured at your store level.

Application: The **Price Override Report** should be checked at least once a year to verify that the prices being charged on your point of sale correctly match to the prices on your menu board.



Utilities

The **Utilities** folder contains several new items. These items include the ability to change the substitution pricing at the restaurant level, as well as the Electronic Journal, which is also available in Radiant Enterprise. The Electronic Journal included with SMW includes new features that allow for easier searching of transactions.

Terminal Management

Description: The **Terminal Management** task allows you to manage all of your restaurants POS, and KPS (Kitchen Production System) units. You can both reboot terminals, and inactivate (take offline) from this task.

Application: The **Terminal Management** screen is similar to the Terminal Management available on the POS. Use the Terminal Management to easily reboot both your POS, and KPS systems after you receive a Full Download.

 You cannot reboot the Site Controller (Terminal 123) from the SMW application.

Substitution Item Pricing

Description: The **Substitution Item Pricing** task allows you to manage your substitution pricing at the restaurant level. The substitution price is the amount charged when substituting a different item than the default item in a value basket. (Example Onion Rings instead of Fries in a Value Basket).

Application: Follow the steps below to use SMW to manage your restaurants Substitution Pricing.

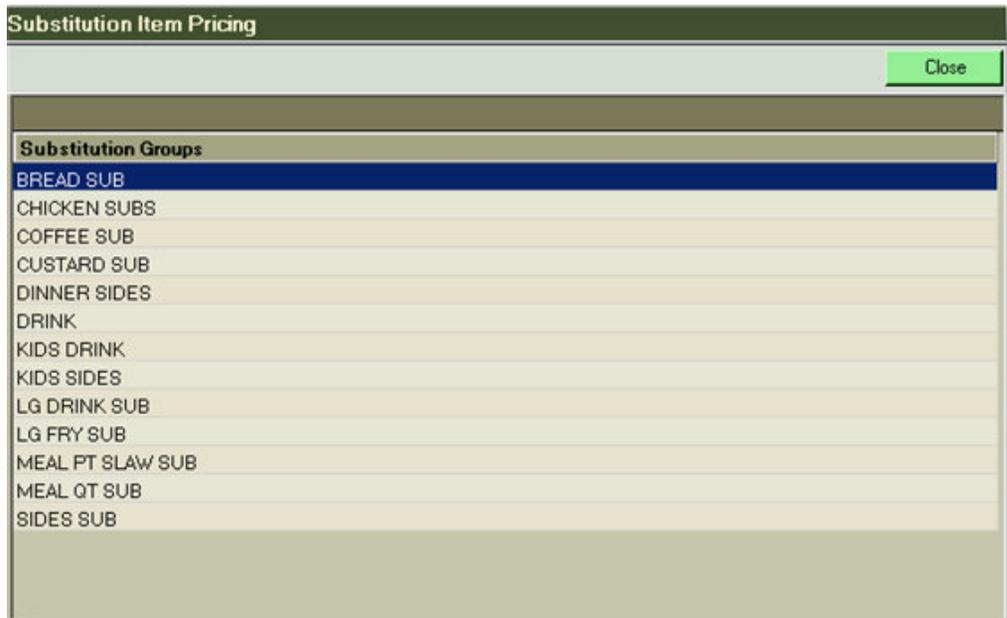
1. Click on the **Substitution Item Pricing** task. You will see the following pop-up window (*Figure 3.1*) alert regarding changes and their affect on pricing. Click on the **OK** button to continue.

FIGURE 3.1
Warning from Substitution Item Pricing alerting the user to the affects of changes made to pricing



2. You will then be brought to the substitution group screen. The substitution groups represent categories for all of the items that can be substituted for a Value Basket, Dinner, Kids Sides, etc. Use the chart below to better understand what each substitution group contains. (*Figure 3.2*)

FIGURE 3.2
Substitution Item Group selection screen



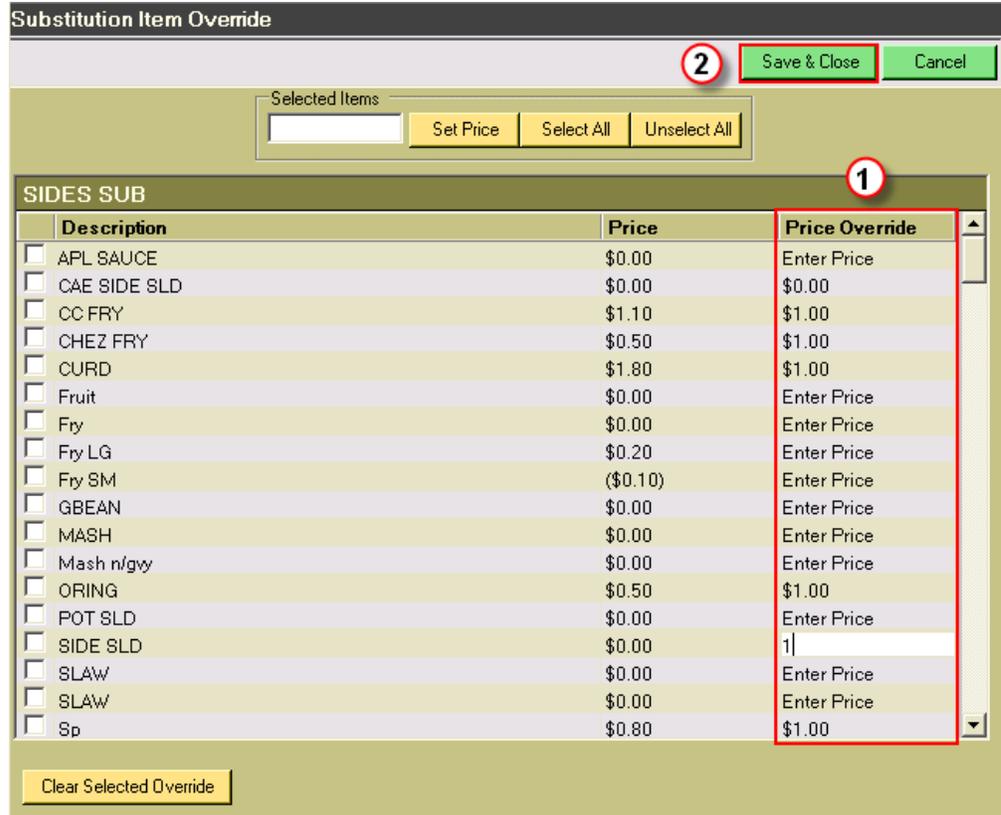
Substitution Group	Description
BREAD SUB	Used for restaurants serving breakfast, allows for the pricing of toast choices on breakfast meals
CHICKEN SUBS	Allows for pricing of the chicken choices in salads
COFFEE SUB	Used for restaurants serving breakfast, allows for the pricing of drinks choices on

	breakfast meals
DINNER SIDES	Allows for the pricing of dinner side items
DRINK	Allows for pricing of drinks choices used in a Value Basket
KIDS DRINK	Allows for the pricing of drinks choices used in a Kids Meal
KIDS SIDES	Allows for the pricing of sides choices used in a Kids Meal
LG DRINK SUB	Allows for the pricing of drinks choices used in a Extra Size Value Basket
LG FRY SUB	Allows for the pricing of sides choices used in Extra Size Value Basket
MEAL PT SLAW SUB	Allows for the pricing of sides choices used in both the 8pc & 12pc Family Dinners
MEAL QT SUB	Allows for the pricing of sides choices used in the 16pc, 20pc, & 24pc Family Dinners
SIDES SUB	Allows for the pricing of sides choices used in a Value Basket
Snack Pak Sub	Allows for the pricing of sides choices in a SnackPak
SnackPak Drink	Allows for the pricing of alternative drinks in a SnackPak

- Once you have selected a substitution group. You will be brought to the Substitution Item Override screen. From this screen you can make all of the positive adjustments to your substitution items. Place your cursor in the *Price Override* and select the *Enter Price* text. (Figure 3.2 1). You can also check the boxes to the left of any group of items, enter the price in the white box at the top of the screen and click the **Set Price** button.

⚡ **Negative substitution prices cannot be added using SMW. (Example: Substitution price for a coffee in a Value Basket) If you would like to make a negative price adjustment please contact CfSi or RDS.**

FIGURE 3.2
Substitution Item
Pricing display



- Once all of the necessary changes have been made. Click on the **Save & Close** button to save your changes. (Figure 3.2 2)

SCENARIO

You would like to change your substitution pricing for your soups. The following steps would need to be taken to complete this process.

- Select the SIDES SUB group. From this group enter the appropriate pricing change you would like made. We will use \$1.00 in this example. You will need to change all of the items beginning with SP for soup. This includes Bread Bowl soups as well.
- Next select the KIDS SIDE SUB. Follow the directions outlined above. Make sure that you change all of the appropriate items for the substitution group.
- Finally select the LRG FRY SUB. Follow the directions outlined above. Make sure that you change all of the appropriate items for the substitution group. Double-check your work that you have just done, and then click the **Save & Close** button.

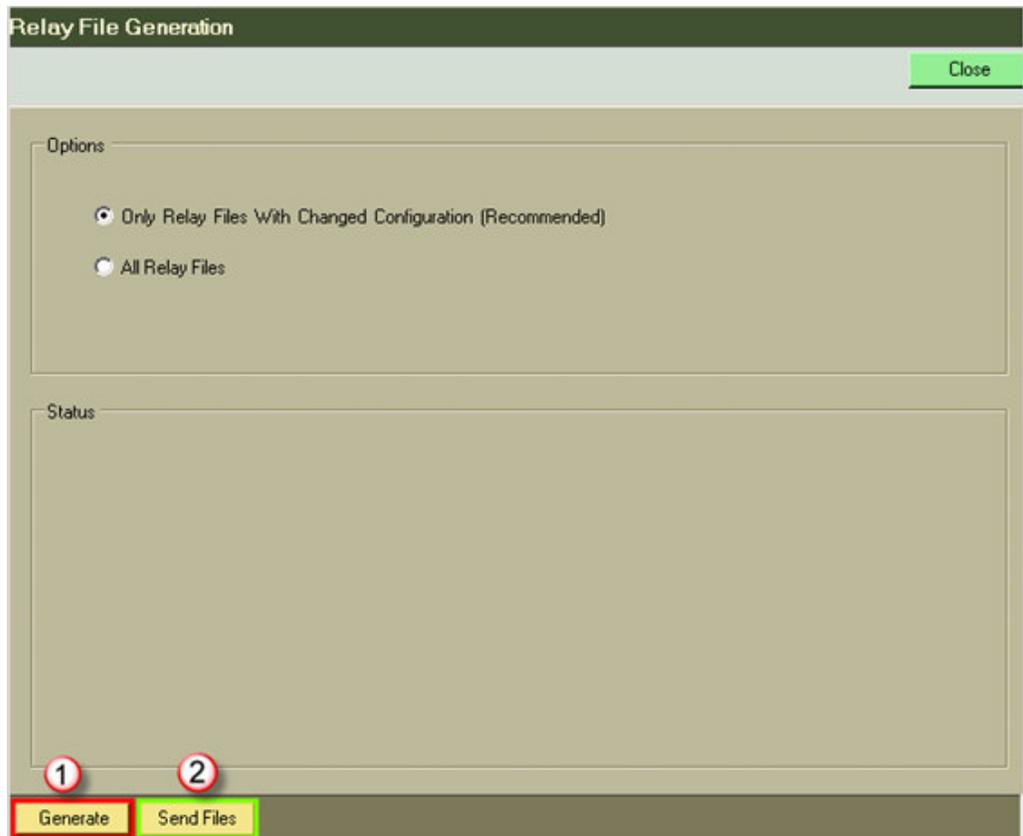
Relay Generation

Description: **Relay Generation** is used to update the changes on your restaurants site controller, (specifically substitution prices) and then send the new files to the POS.

Application: **Relay Generation** is two-part process. Follow the steps below to use SMW to perform Relay Generation.

1. Click on the **Relay Generation** task. You will be brought to the following screen. (*Figure 3.3*)

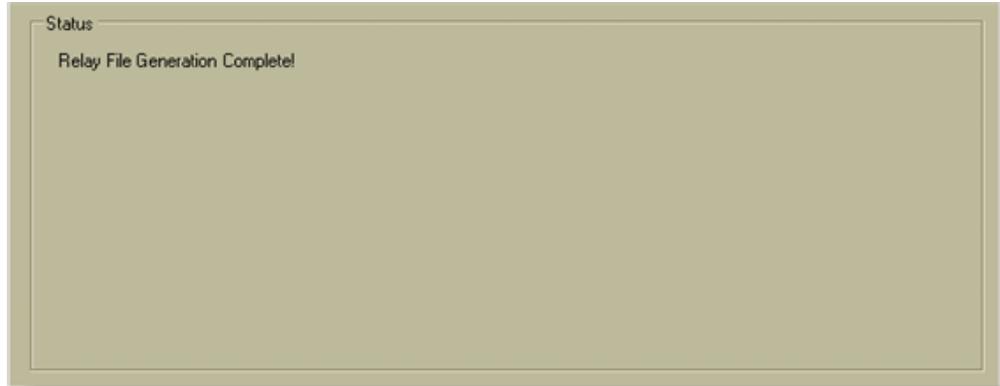
FIGURE 3.3
Relay Generation
display



2. Leave the default option of *Only Relay Files With Changed Configuration (Recommended)* selected. Click on the **Generate** button. (*Figure 3.1 1*)

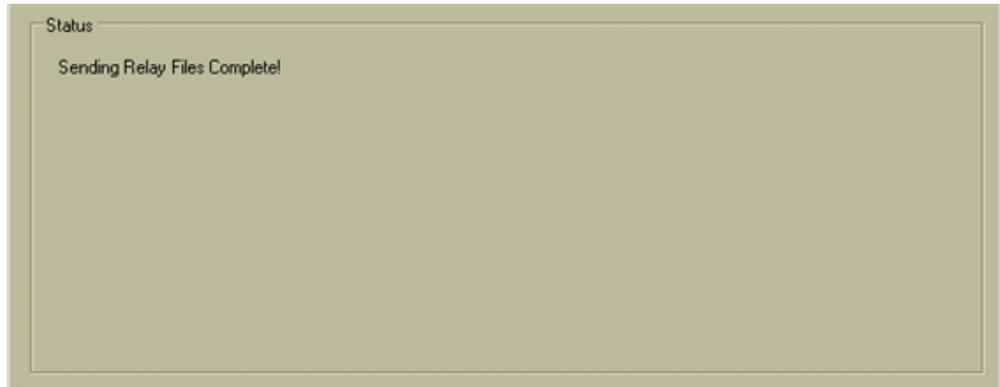
3. Once the Relay File Generation has completed you will notice the following text in the *Status* area of the screen.

FIGURE 3.4
Generate Relay Files
Completion



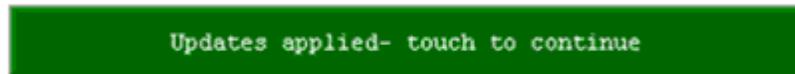
4. Next, click on the **Send Files** button. (Figure 3.3 2) This will send all up the newly updated prices to your POS. Once this has completed you will notice the following text in the *Status* area of the screen. (Figure 3.5)

FIGURE 3.5
Send Relay Files
completion



5. Once the Relay Files have been sent to the POS you should see the following display on the POS. (Figure 3.6) This will confirm that the POS has received the files. Touching the message **will not** cause the POS to reboot.

FIGURE 3.6
POS update files
display message



EJ Viewer

Description: The **EJ Viewer** allows for the same functionality as the Electronic Journal in the Radiant Back Office. However, the SMW version has several added features that make the EJ Viewer a better choice for some search options. The **EJ Viewer** used by SMW also keeps a larger amount of business dates available to search through. SMW has 90 available days of archived transactions, while the Radiant Back Office has 45 days.

Application: Follow the steps below to use the EJ Viewer to search through transactions at your Restaurant.

1. Click on the **EJ Viewer** task. (Figure 3.7) You will be brought to the follow screen.

FIGURE 3.7
EJ Viewer search parameters display

2. The **EJ Viewer** has multiple options available to search by. Each field will be covered in the following section.
 - **Business Date** – Allows you to search by a single date, or date range
 - **Transaction End Date** – Allows you search by a single date or data range, as well as a time range
 - **Employee** – Culver’s does not currently utilize employee sign ins at the POS. The generic employees setup up for each restaurant (when you sign-in a POS as 1, 2, 401, 402, etc.) will be displayed as choices.

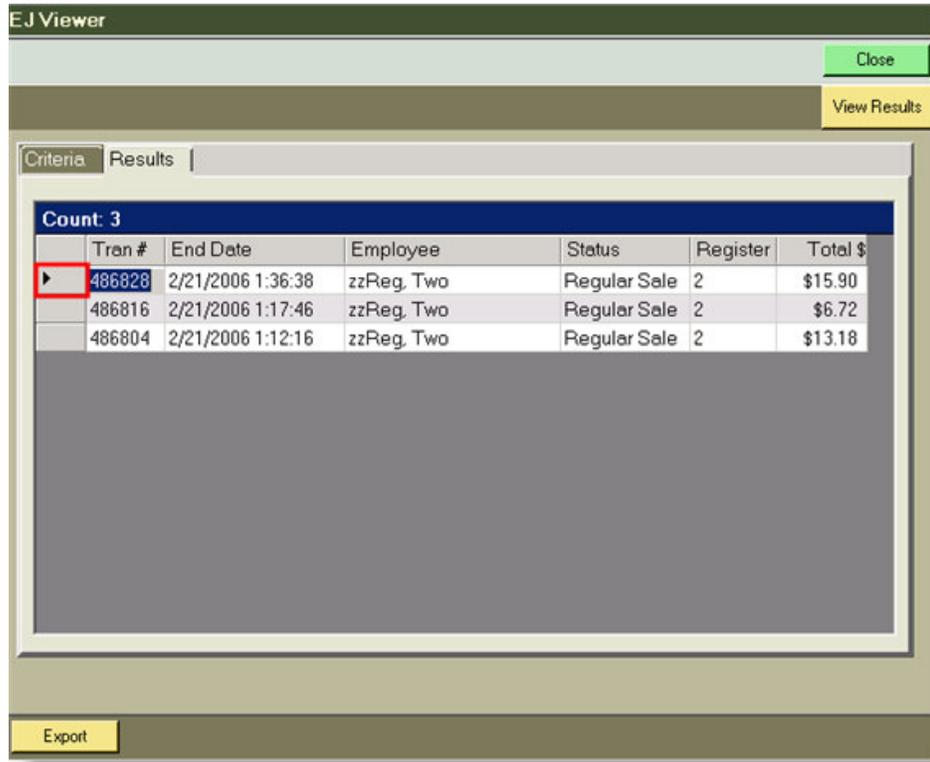
- **Transaction Type** – Allows you to search by how the transaction category. EJ Viewer has several Transaction Types that were not available in the Radiant Back Office.
 - **Cancelled Transactions** – Will display transactions that were cancelled on the POS for the selected time period
 - **Transaction With Cancelled Items** – Will display transactions that had items cancelled at any point of the order taking process.



Canceling items after the transaction has been finalized has been an issue in Drive Thru. An employee is able to store a transaction, and then after recalling the order, cancel an item. The guest still receives the correct food; however, the amount of the cancelled item is not accounted for in the drawer totals.

- **Transaction With Discounts** – Will display transactions that had any discounts applied to them at the POS.
 - **Transaction Number** – Allows you to search by a specific or a range of transaction numbers.
 - **Register** – Allows you search by POS number as defined by the number located in the lower right portion of the POS.
 - **Tender Type** – Allows you to search by different payment methods. These include Cash, Check, Credit, etc.
 - **Tender** – Allows you to search by a variation of the Tender Type. For example, if the Tender Type of Credit has been selected the options of Culver's Card – Online, and Credit – Online Exact, are available.
 - **Transaction Total** – Allows you to search by a specific or a range of total dollar amounts on a transaction.
 - **Cardholder Name Contains** – Allows you to search by a credit transaction's Cardholder Name.
3. After you have selected your search parameters click on the **View Results** button. Alternatively, you can click on the **Export** button that will save the results as a .CSV (Comma Separated Value) file. This file can then be import into Excel or any other spreadsheet program.

FIGURE 3.8
EJ Viewer search
results



- At the results screen click in the column that has the ► symbol. (Figure 3.8) This will then display the EJ Viewer detailed transaction report. From this screen, you can also print the transaction details to your printer attached to your PC. (Figure 3.9) An example of how the transaction details are displayed is shown below.

FIGURE 3.9
EJ Viewer detailed
transaction report



SCENARIO

A customer calls and complains that he did not receive an item with his meal. He tells you the approximate time that he was in the store, that he ordered his meal To Go, what he had approximately paid, and that he paid with a Credit Card. The following steps outline how you could use **EJ Viewer** to help solve this issue.

1. Start by entering the correct date and time information in the Transaction End Date
2. Change the Tender Type to credit, and the Tender to Credit – Online Exact
3. View the Results, and from the transactional summary screen sort by Employee and only look for transactions coming from all registers except zzDrive, Thru. Look for a transaction that is near the amount quoted by the customer.
4. If you can find the transaction, look for any discrepancies that may appear, such as cancelled items.

Item Description Editor

The **Item Description Editor** task allows you to change the receipt text of an item so that it will go to the kitchen and print on the receipt with a different name. The button text remains unchanged, as does the reporting in the back office.

Log Out

The **Log Out** task logs out the currently signed in user. You will then be navigated back to the sign-in screen

Exit

The **Exit** task closes SMW.

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Index

C

Clocked In · 4
Credit Batch · 5

D

Daily Processing · 3
Daily Site Summary Report · 6
Daily Timecard · 7
Discounts/Coupons · 5
Downloading Store Manager Workstation · 1

E

Edit Deposits · 3
Edit Timecards · 3
EJ Viewer · 16
EJ Viewer detailed transaction report · 18
EJ Viewer Options · 16
Electronic Journal Scenario · 19
Exit · 19

F

Financial Report · 4

G

Generate Relay Files · 14

H

Host Contact · 3

I

Item Description Editor · 19

L

Labor Cost Calculation · 5
Labor Percent Sales · 5
Log Out · 19
Logging Into Store Manager Workstation · 1

M

Manage Shifts · 2

O

Operator Shift Report · 4

P

POS PIN · 2
POS Update Message · 15
POS User Setup · 2
Punch Limitations · 3

R

Relay Generation · 14

S

Sales Activity Report · 4
Sales Mix Report · 4
Send Relay Files · 15
Site Summary · 5
Substitution Group · 11
Substitution Group Descriptions · 11
Substitution Item Pricing · 10
Substitution Pricing Scenario · 13

T

Terminal Management · 10