How to Sign into the TallOrder POS for the first time

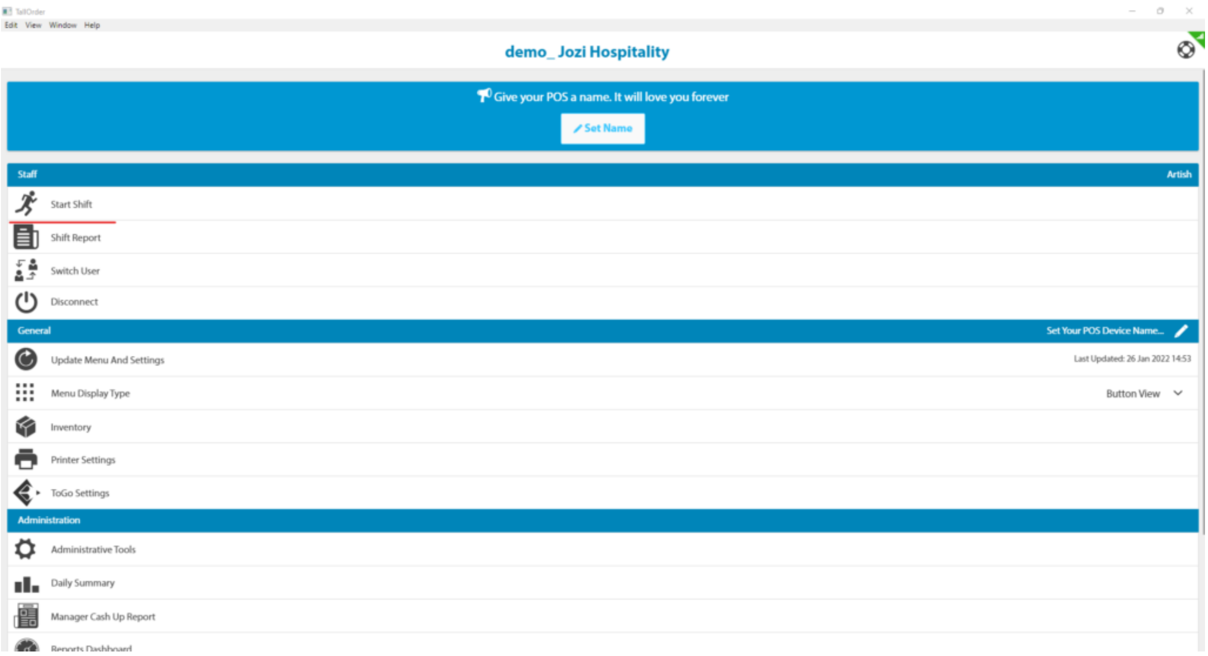
- On the POS sign in screen, enter the relevant credentials (this includes your email address and password).
- Under Advanced, please select the ‘Override as Master POS’.
- Next, click ‘Sign in’ to proceed.
- Once you have signed in, you will arrive at the ‘Select a Store’ screen.
- Select your store and wait for the staff sign in screen to appear. Enter your unique 4 digit code (this would’ve been provided to you during TallOrder admin setup).
- You will now arrive at the POS home screen which means you are ready to start a shift.
- *Watch our YouTube Tutorial:* https://youtu.be/DPmn5qsNqxI

How to Login as Manager on the POS

- On the TallOrder POS, you can switch users on the Home screen and log in as a Manager.
- On the Home screen, you can click on the Switch User icon at the top of the screen. This is represented by two profiles and arrows moving in different directions.
- To switch a staff member, enter the new staff 4 digit pin to proceed.
- If you would like to sign in as a Manager, simply click on the TallOrder logo within the pop up screen login number pad.

How to End and Start a New Shift

- On the TallOrder home screen, please click on the Settings icon (represented by three horizontal lines).
- You will be presented with a drop-down menu. Please click on 'End Shift'.
- Please check and proceed past cash up details.
- The Manager Sign Off pin will be entered in order to proceed.
- You have now arrived back at the Settings area of the TallOrder POS. Select 'Start Shift' in order to start a new Shift.
- Here, you can add your Float amount. If you like, you can move straight past the Float entry step and arrive at the POS home screen to continue.
- *Watch our YouTube Tutorial: https://youtu.be/RBZYZUiy5I0*

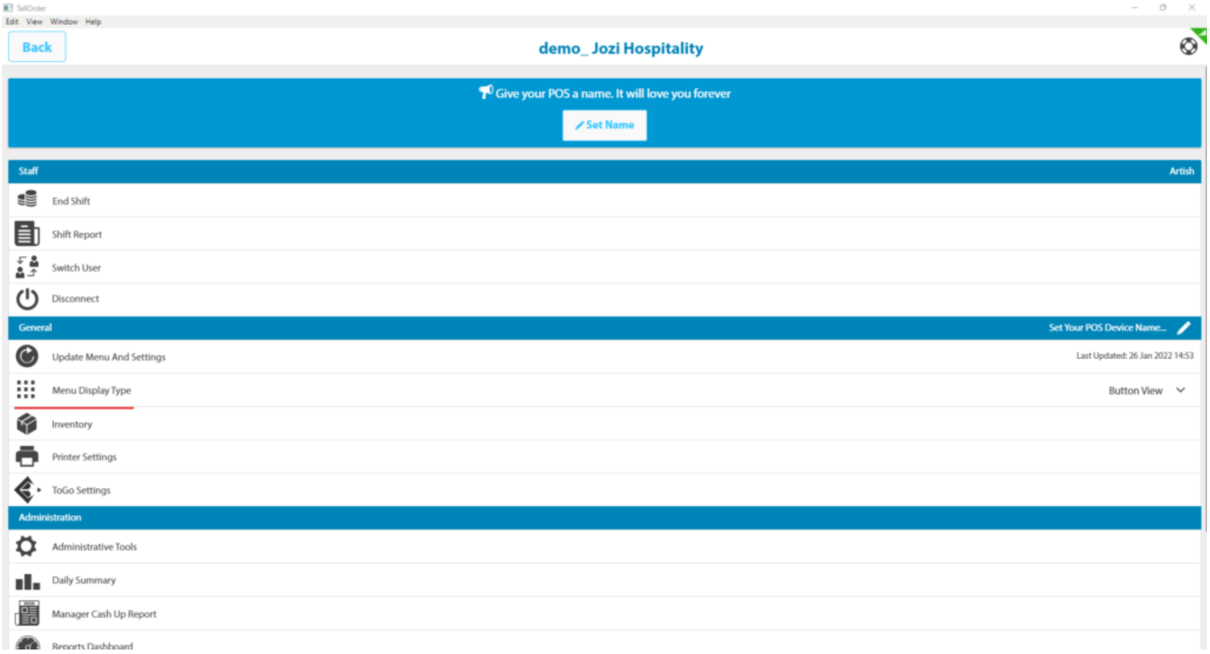


How to Switch User on the POS

- Switching users is quick and easy on the TallOrder POS.
- Select the Switch User icon at the top of the page on the home screen.
- Next, enter the unique 4 digit code to open the new shift of a new user.
- Next, add a Float amount if necessary.
- Once completed, you will arrive at the home page, but now as a different user.
- *Watch our YouTube Tutorial: https://youtu.be/yBDp3d1FH9c*

How to change your Menu Display Type

- Go to the Settings area of the TallOrder POS. (Which can be accessed by clicking on the three lines on the top left hand corner of the screen.).
- Select "Menu Display Type" and you will be presented with a drop-down option of "List" or "Button" view. Choose an option according to your own needs.

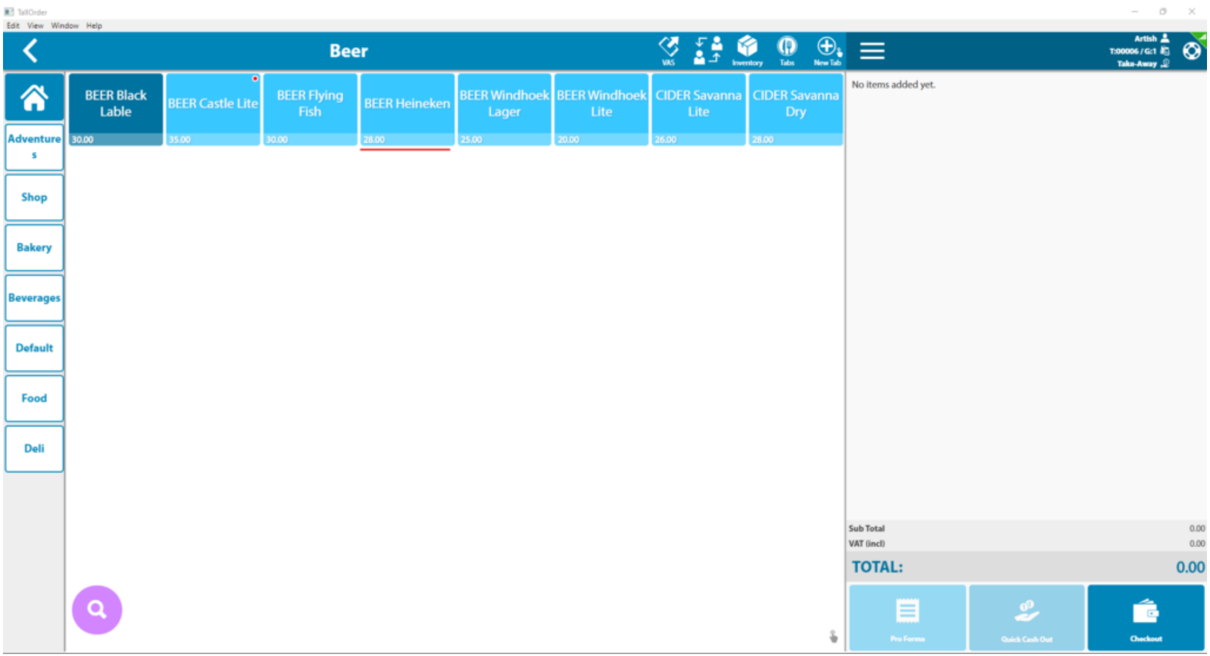


How to Create a New Tab on the POS

- On the POS home screen, you will see the tab section to the right of the screen. If this is your first time creating a tab in your current shift, there will be a 'Create new Tab' button. You can also use the 'New Tab' icon at the top of the screen, represented by a plus sign.
- Next, you will be presented with 'Table and Guest Count' pop up block. Please enter the table name or number as well as the number of guests. This pop up block can be skipped if not applicable.
- Click on 'OK' to proceed. You will be automatically returned to the home screen where you will note the details entered previously at the top right-hand corner of the screen.
- *Watch our YouTube Tutorial:* [*https://youtu.be/At7JOlRdHWc*](https://youtu.be/At7JOlRdHWc)

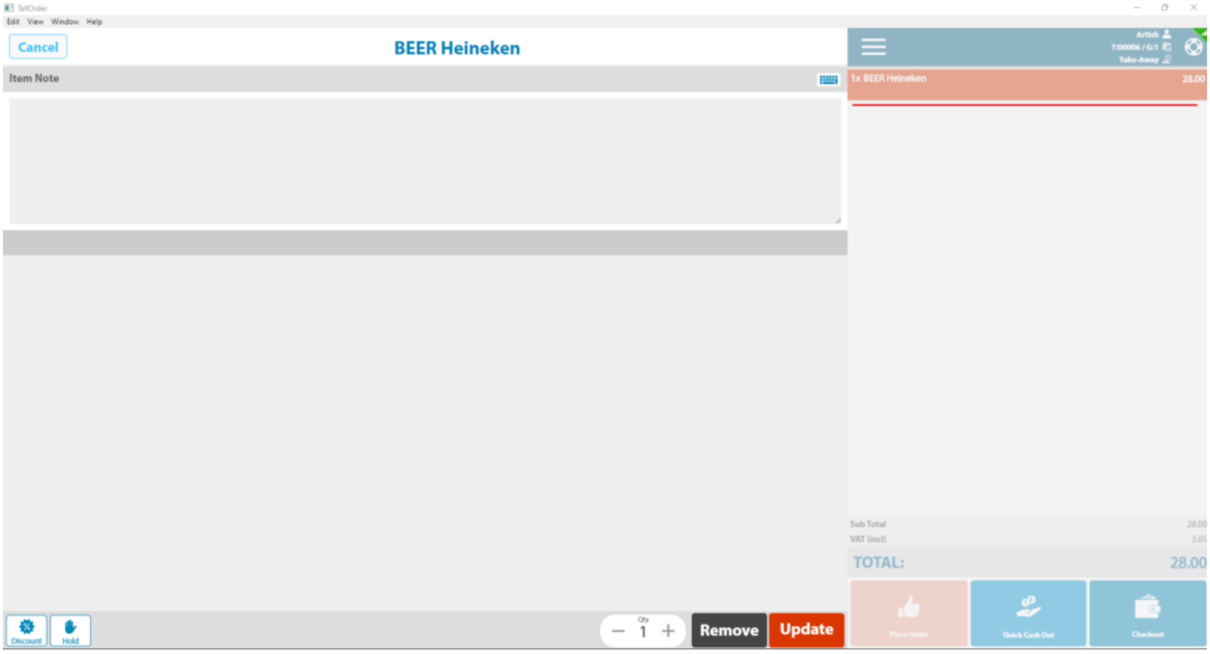
How to Add an Item to a Tab on the POS

- Once you have Created a Tab (see note 2), you will be able to Add Items to this tab. For this example, we will add a coffee to the tab.
- To the left of the POS screen, you will see the various item Headings. Please select the relevant heading for coffee. Here we have decided on the term Hot Beverages.
- Depending on your menu, you may have to select the specific Hot Beverage subheading.
- Next, you will arrive at the Item Detail Screen. Please select the item (coffee), and further specifics depending on your menu. This could be coffee size, single or double shot, milk preference and quantity.
- You will be able to add any specific ordering notes within the Item Detail Screen.
- Once complete, select Add Item to proceed.
- The POS will return you back to the home screen. On the right-hand side of the screen, you will see your current tab or tabs opened. Within each tab, you will see the items you have added.
- *Watch our YouTube Tutorial: https://youtu.be/hIKZU6__gbY*



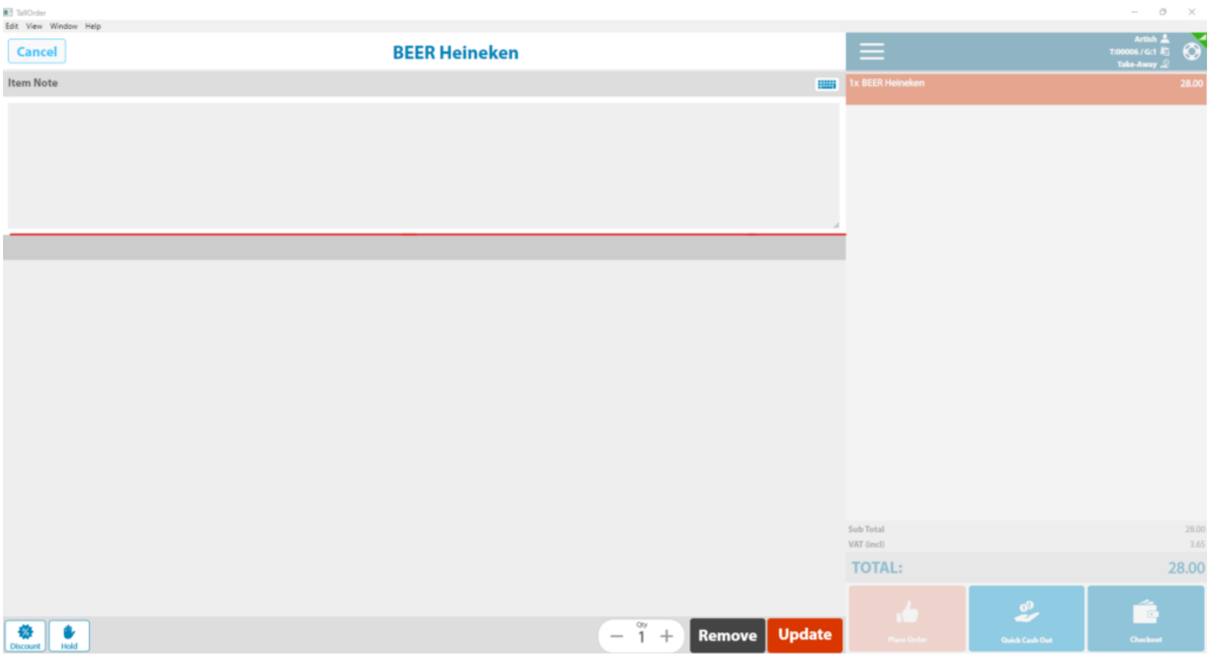
How to Edit a Tab (and change items) on the POS

- On the POS home screen, you will be able to see how many tabs you currently have open on the tab section to the right-hand side of the page. (How to Create a Tab has been explained in the tutorial above).
- If you click on the tab that you would like to edit, you will see that the tab opens and there, you will be able to see the relevant details i.e. the menu items already ordered).
- To change the details of the tab, please click on the relevant item.
- If you click on the item you would like to change (for example, I would like to change my skim milk order for the coffee order to the full cream milk option), the item detail pop up screen will appear.
- Here, you can change the details of your order. Please click on the Update button to action changes.
- *Watch our YouTube Tutorial: https://youtu.be/Qh5_IGELSOA*



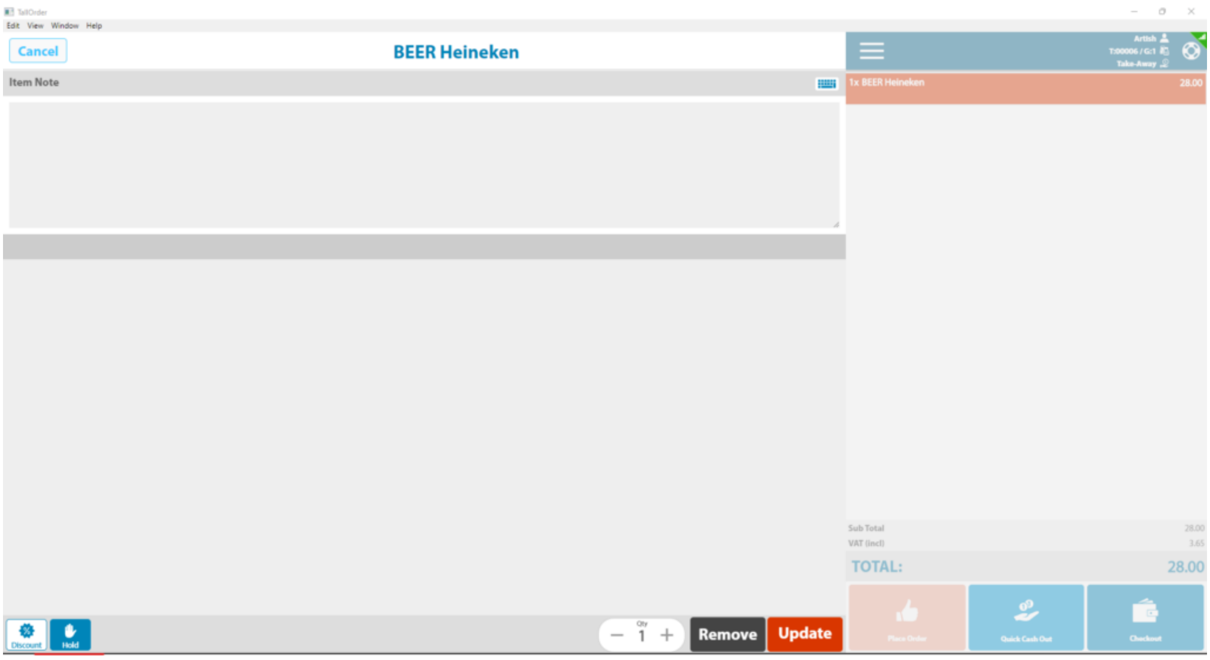
How to Add Notes to Items on the POS

- On your home screen, please select the tab you would like to open and then add the item to that tab. (How to add an item can be found in previous tutorials).
- Once you have selected the options for an item, you will be able to add a note with each menu item you add. For example, if you selected ‘fried eggs’ for a breakfast menu item, the note could let the kitchen know what exact type of fried egg the customer would like. If they would like their fried egg sunny side up, this detail can be added to the Notes section.
- Once the Note has been added, you can Add Item and proceed.
- *Watch our YouTube Tutorial:* https://youtu.be/Q7OUpiPu7lw



How to Hold an Item on the POS

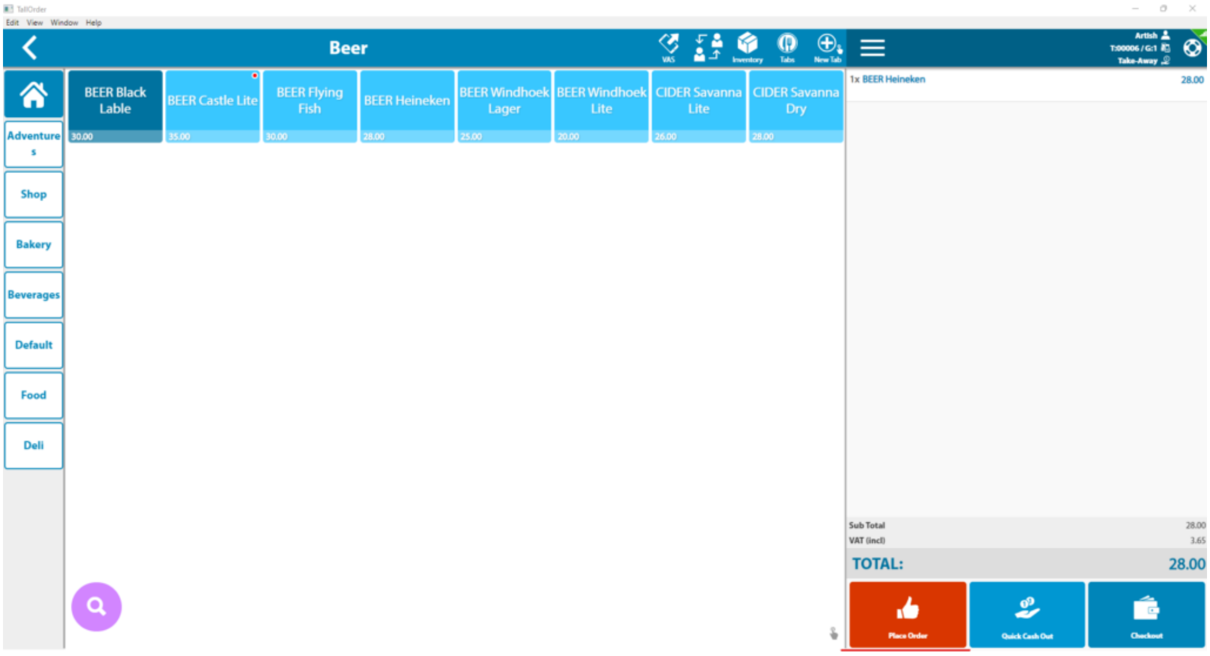
- In some cases, in a restaurant environment, a patron may order their starters and mains together. This is when you can use the TallOrder Hold Item function – allowing you to hold the placing of the main order until the patrons have finished their starters.
- On your home screen, please select the tab you would like to open and then add the multiple items to that tab. (How to add an item can be found in previous tutorials).
- Once you have added your items, you can click on the specific item you would like to hold.
- An item detail pop up screen will appear. At the bottom of this pop up page you will see a 'Hold" button. Please click on that button to activate the holding of this item until the patrons are ready for this order to proceed.
- To action this change, click on the 'Update' button at the bottom of the page. Once you have returned to the home page, you will see that your hold item has changed colour in the Tab section of the screen.
- *Watch our YouTube Tutorial:* [*https://youtu.be/TMTvSXtxblQ*](https://youtu.be/TMTvSXtxblQ)



How to Place an Order Once you have Confirmed an Item on the POS

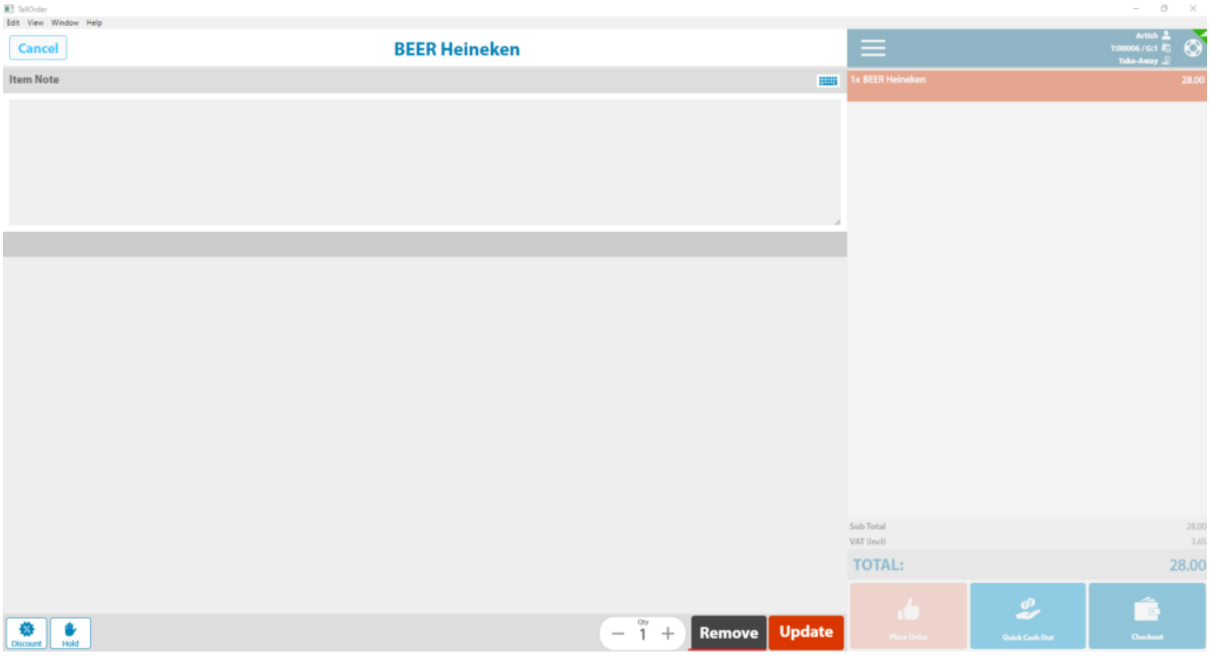
- After you have taken the order from the customer and added the item to the tab, you must 'Place Order' for the that order to be sent to the kitchen for processing.
- On your home screen, click on one of the orders within the tab. (How to Create a Tab and Add an Item can be found in previous tutorials).
- For the order to be officially placed and for it to be sent to the kitchen or the bar, please click on the 'Place Order' button at the bottom of the page.
- From here, you will be presented with a confirmation pop up screen, where you can click on the 'Place Order' button again to confirm.

- Once this has been actioned, you will see that the colour of the items in that tab have changed, meaning that the order has now been placed.
- Watch our YouTube Tutorial: https://youtu.be/K550ng1DWsU



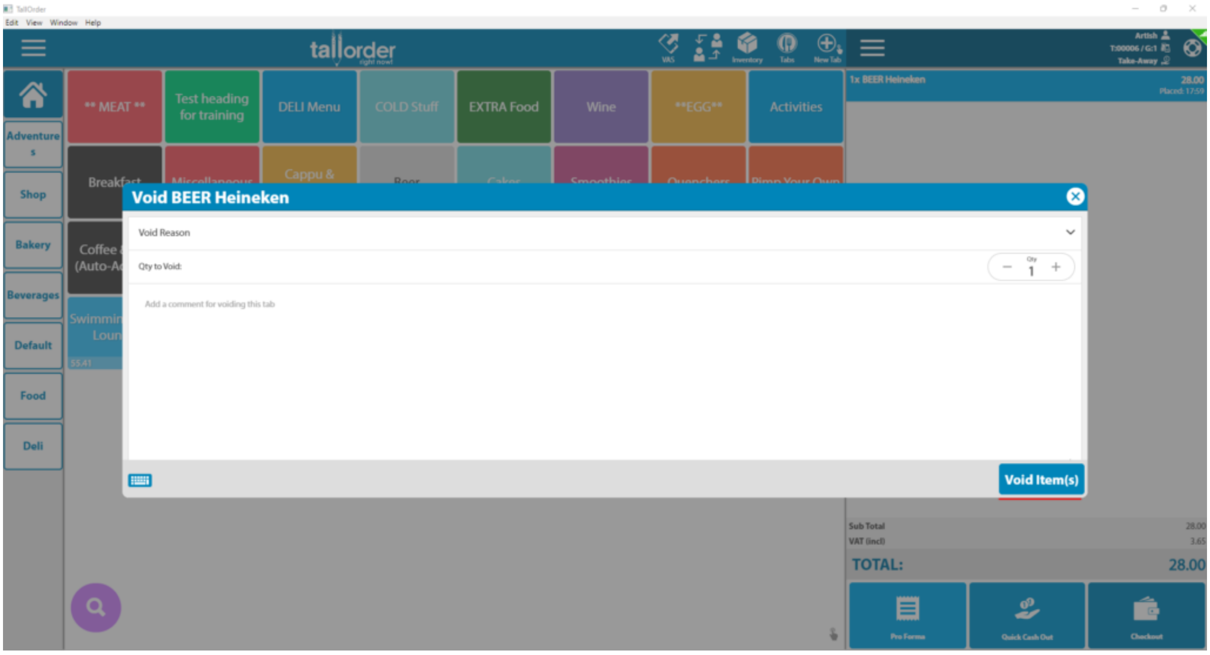
How to Remove an Item from a Tab on the POS

- There may be a case where you will need to remove an item. On your home screen, you can see open items within a tab on the right-hand side of the screen.
- Select the item you would like to delete by clicking on the item.
- You will then arrive at the item detail pop up screen. Here you can select Remove at the bottom of the screen. You can also remove by swiping from right to left on the item.
- You will then be presented with a confirmation pop up which will allow you to confirm the removal of the item.
- Click 'OK' to proceed.
- When returning to the home screen, you will see that there are no those items presented on the right-hand side tab.
- *Watch our YouTube Tutorial: https://youtu.be/Xu69mhM4lkQ*



How to Void an Item on the POS

- If your customer changes their mind, it is possible to void an entire menu item after the order has been placed. This is called 'Voiding'
- Click on the item you would like to void on the right-hand side of the screen under the relevant tab.
- You will then be presented with a pop up screen. Here, you can select the number of items you would like to void.
- Once you have selected the number of items that will be voided, your manager must input their unique pin to continue.
- On the home screen, you will now see that the item voided under the relevant tab will change colour, showing that it has been voided.
- *Watch our YouTube Tutorial: https://youtu.be/9ulhEKgXjrU*

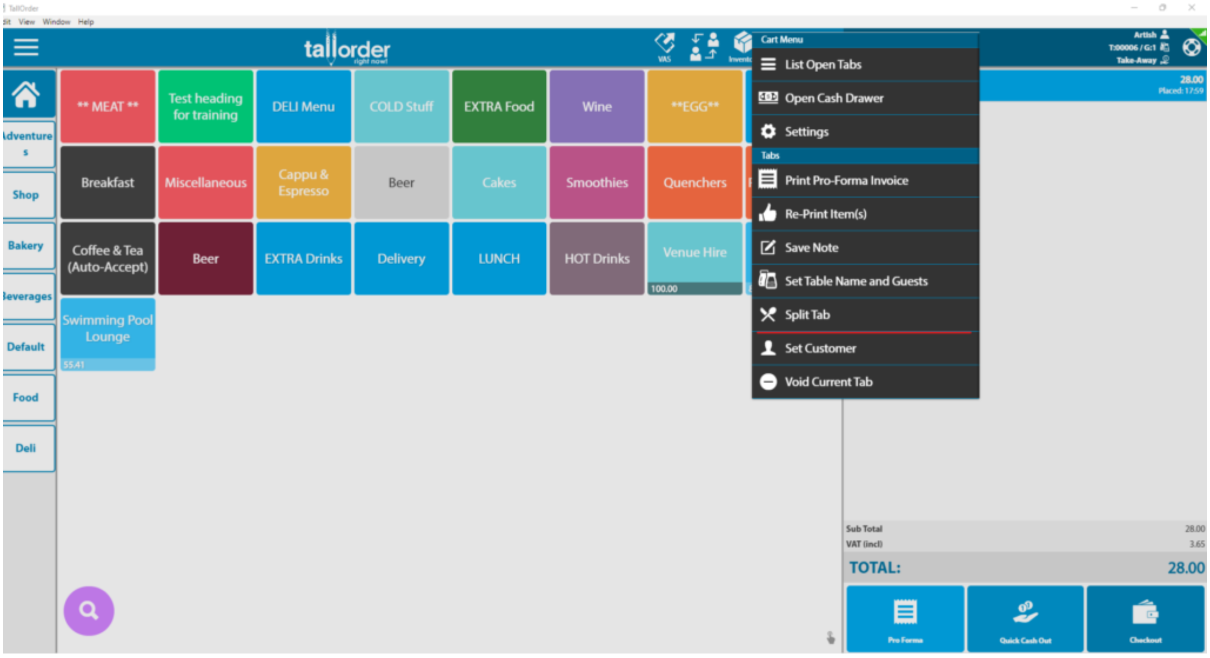


How to Checkout your Tab on the POS

- On the home screen, please select the tab you would like to check out. Note that you can only check a tab out if the relevant orders have been placed.
- Click on the order under the tab. Here you will see the relevant items that were placed under that tab.
- Please click on the Checkout tab at the bottom of the screen.
- The next screen will show you what it due. You can select the various payment options depending on what payment method the customer preferred.
- Above the payment options, you can select the tip if applicable. Tips are shown in monetary increments and percentages.
- Once complete, click on the 'Proceed Payment' button to continue.
- Once payment has been made, you will be returned to the home screen to address your other open tabs.
- Watch our YouTube Tutorial: https://youtu.be/r_u3b3yC_iA

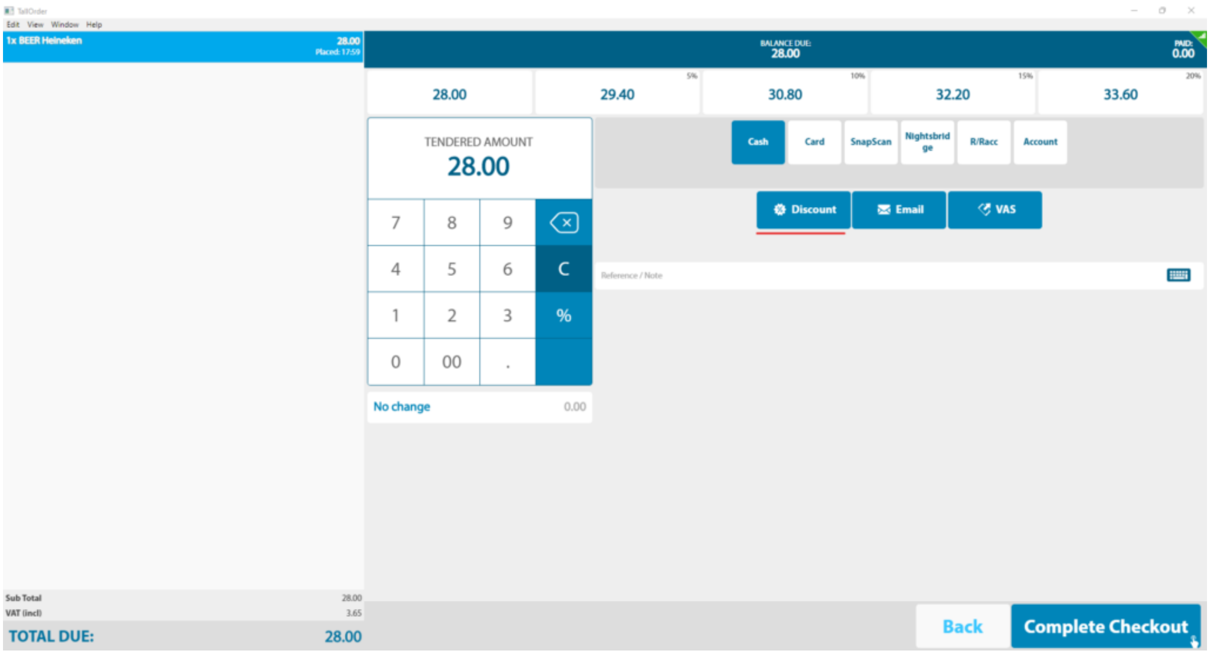
How to Split to the Bill During Checkout on the POS

- In some cases, customers will request to split their order between one of two people.
- When looking at the numerous items ready for checkout under the relevant tab (on the right-hand side of the home screen) you will need to click on the 'Settings' icon above the order (represented by three horizontal lines).
- The drop-down list will then appear, allowing you to select the 'Split Tab' button from the options presented.
- Select the items that you would like to add to bill number one and click 'Proceed' to continue.
- Split bills require the unique manager pin for approval.
- Back on the home screen, you will see that the tab has been split into two different tabs (on the right-hand side of the page).
- Watch our YouTube Tutorial: https://youtu.be/FXVKFXCk-MY



How to Apply a Discount on a POS Item

- When checking out an item, below your payment types there will be a button that reads “Add Discount”. If you click on this button you will be given the option to add either a percentage or an amount discount on the tab amount that is about to be checked out.
- Once you have selected your discount value it will be automatically calculated to the checkout amount.
- This discount amount can be edited or remove before checkout too.

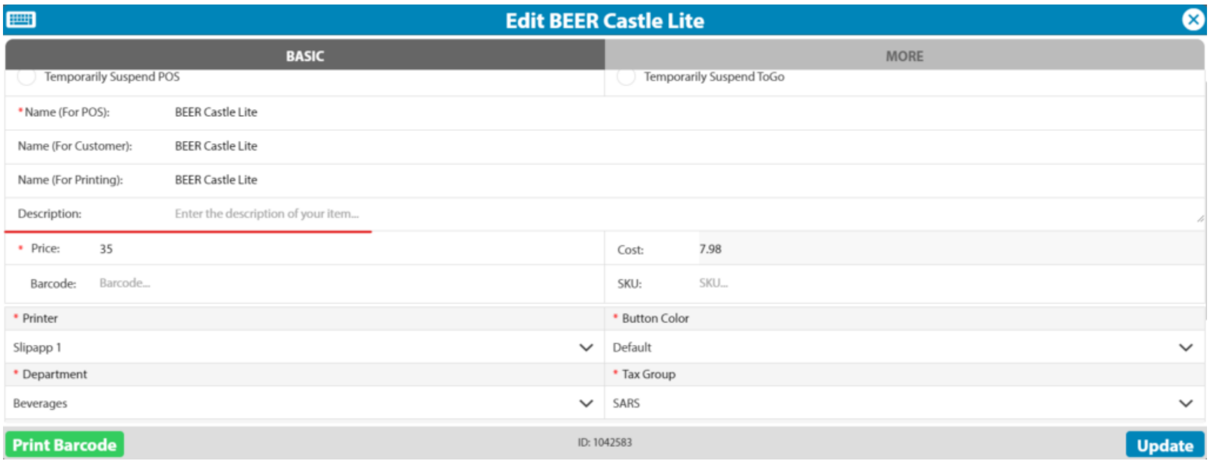


How to Reprint a Slip on the POS

- On the home screen, please select the ‘Settings’ button at the top of the page above the tabs (represented by three horizontal lines).
- Select the Reprint Orders button.
- You will then be presented with the items available, where you can individually select each item for a reprint.
- Click on the Proceed button to continue.
- Note that the unique manager pin will need to be entered for approval.
- Watch our YouTube Tutorial: https://youtu.be/hOCBPPRy010

How to edit the Description of an Item Directly on the POS

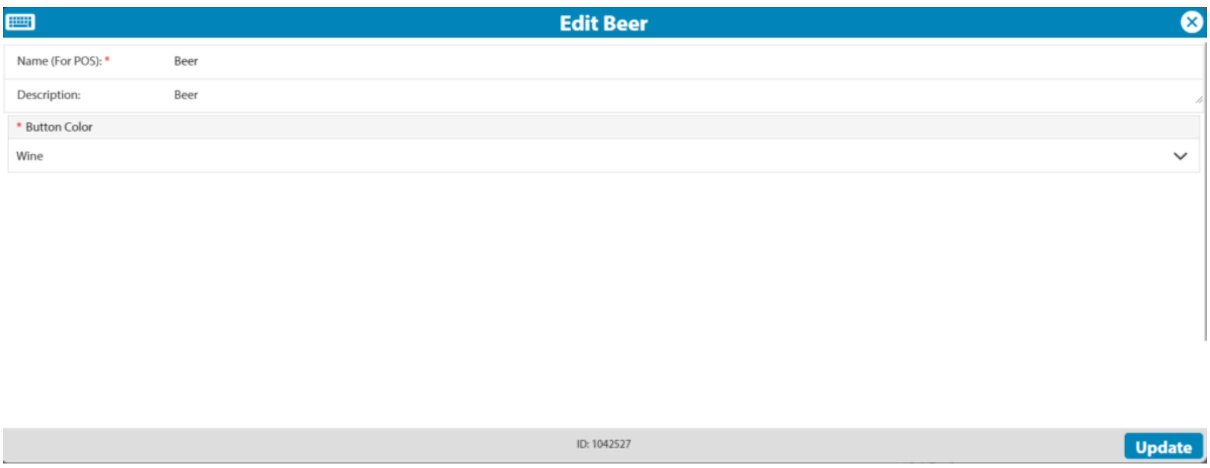
- You can update an edit an item description directly from the POS.
- At the home screen, select the item description you would like to edit.
- Once you have clicked on that particular item, click and hold on that item (also known as long press / click.).
- You will then be presented with the item description. From here, you can edit accordingly.
- Once complete, click on ‘Update’ to proceed.
- The unique manager pin will need to be entered to proceed.
- You will then receive a notification that the item description has been updated directly on the POS.
- Watch our YouTube Tutorial: https://youtu.be/EhM976Nu5So



How to edit the Heading Directly on the POS

- For convenient quick changes, you can edit the item heading directly in the POS.
- On your home screen, click and hold on the Heading item you would like to edit (also known as a 'long press/click').
- A pop up screen will show the heading description. Click on the pencil icon at the bottom right hand side of the pop up.
- Edit the Heading accordingly by changing the 'Name (for POS)'
- Select Update to continue. Remember that for these changes, a unique manager pin is needed to proceed.
- You will now see that the Heading on the home screen has changed.
- Watch our YouTube Tutorial: https://youtu.be/s10UQ5PxWg4

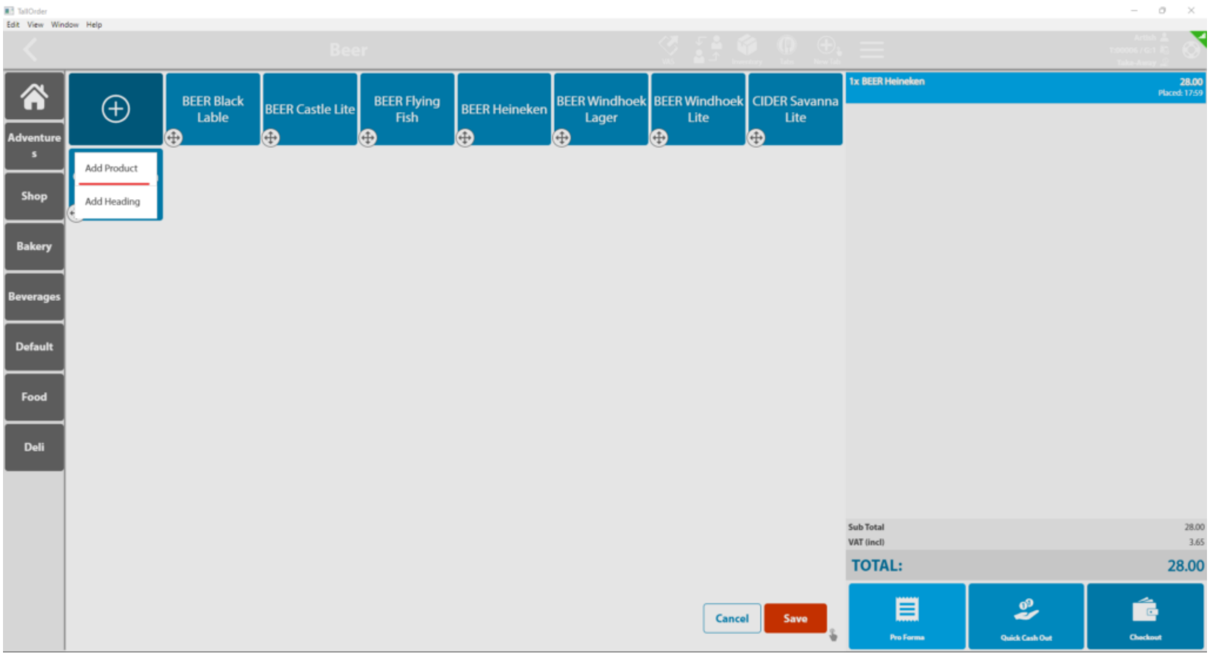
- From here, enter your 6 digit manager pin.
- Once you have signed in, click on the tenant and then Start Shift within that tenant.
- Start your shift with a Float amount if applicable.
- Watch our YouTube Tutorial: https://youtu.be/vZKsze-9a-8



How to Add a Product Within a Heading

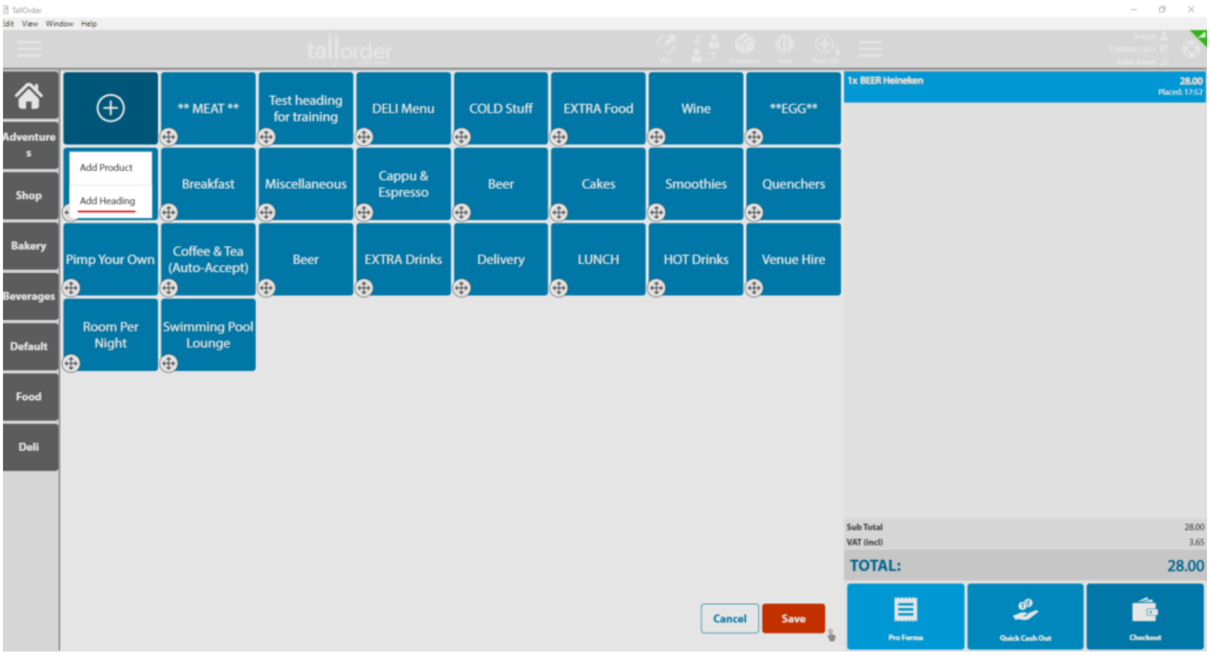
- On the TallOrder POS home screen, click on the selected Heading you'd like to add the Product to.

- You will be able to see if the Heading already has Products present, as there will be Files in the bottom right-hand side of the Heading block.
- Click on the Heading block to open that folder.
- Long click or press down and hold on the screen and a pop-up will appear at the bottom of the page. Here, you can create a Product or Create Heading.
- Note: you can create another Heading Within a Heading if your product is more complex.
- Click on the Create Product button and a Create Product description box will pop up. Here, you can add the relevant details such as Name, Description, Price etc.
- Once the relevant details have been inserted, click 'Create' to continue.
- A Manager Pin is needed to proceed.
- You will now be directed back to the home screen where you will see a pop-up block confirming your Product addition.
- Watch our YouTube Tutorial: https://youtu.be/O4O-Sy3YL7Y



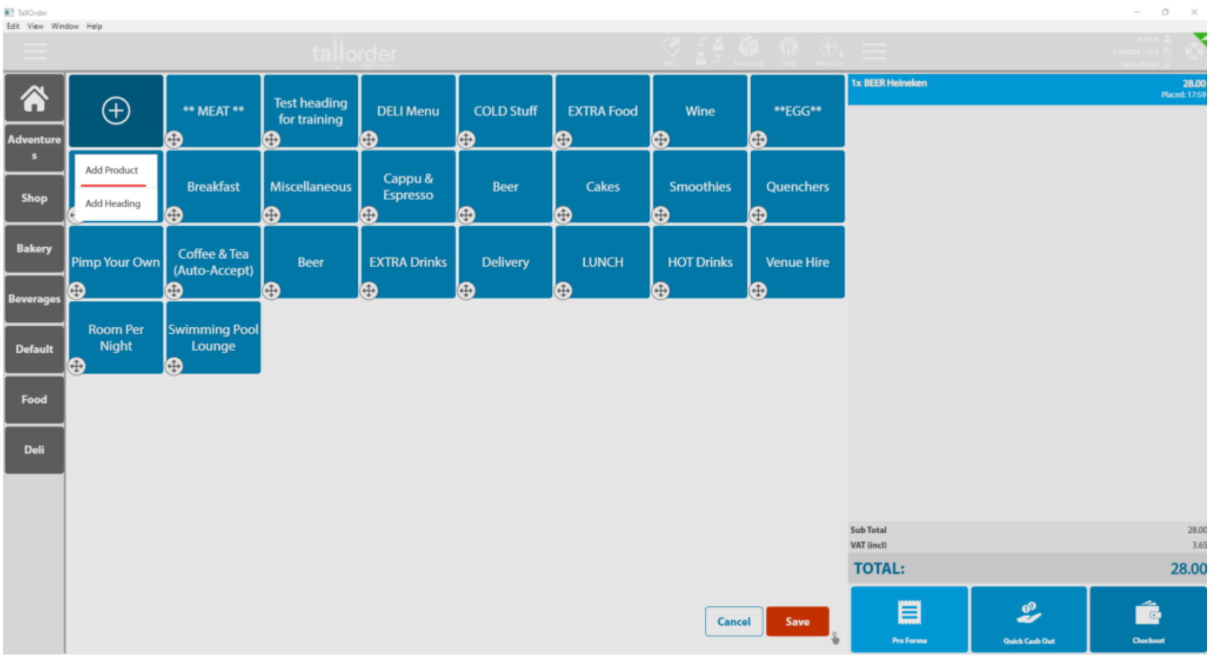
How to Create a Heading Straight from the POS

- You can create a Heading straight from the POS for your convenience. Simply long press or long click on the home screen.
- Here, you can 'Create Product' or 'Create Heading'.
- Select 'Create Heading' to proceed.
- Here you will have to add all of the relevant information to create the Heading. This can include name and description. Once happy, please click 'Create' to continue.
- You will need the Manager Authorization pin to continue.
- Once a new Heading has been created, you will be presented with a pop-up block, asking you whether you would like to create another Heading. Close this pop-up block if you have completed the task.
- You will now see your new Heading available directly on the POS.
- Watch our YouTube Tutorial: https://youtu.be/01q6ouQ1RjE



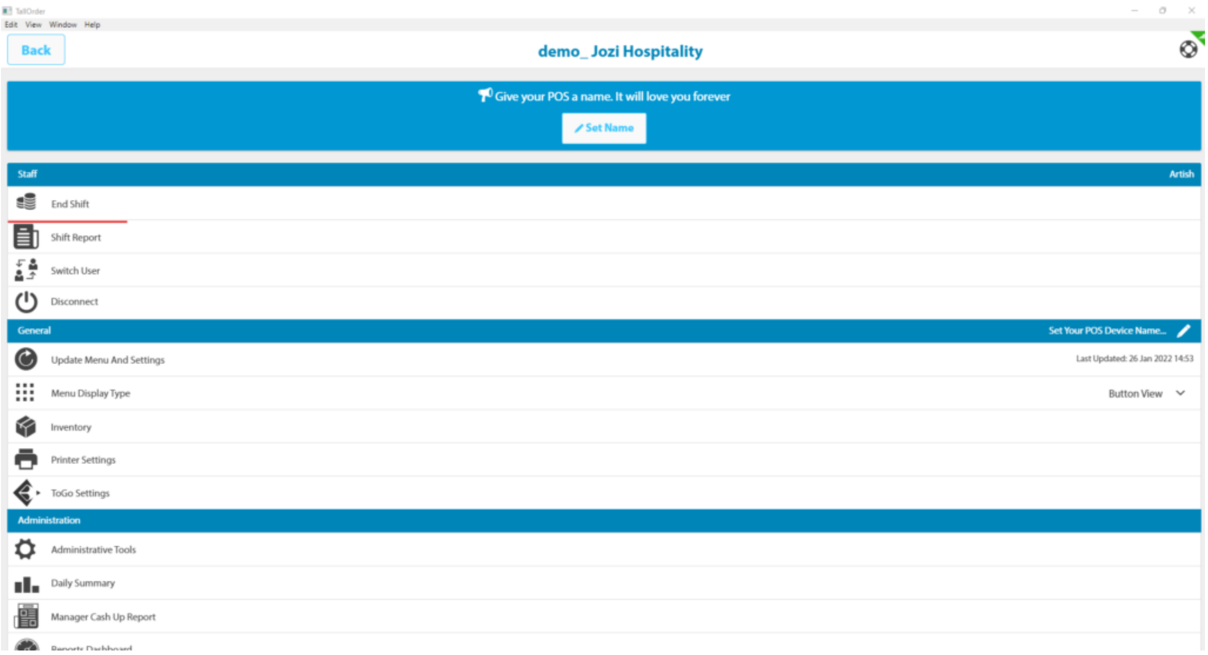
How to Add a Product Straight from the POS onto the Home Screen

- Long click or press down and hold on the TallOrder POS home screen.
- Here, you can 'Create Product' or 'Create Heading'.
- Select 'Create Product' to proceed.
- Please add the name and description, as well as any other relevant details.
- Click on the 'Create' button to proceed.
- A Manager Pin is needed to proceed.
- You will now be directed back to the home screen where you will see a pop-up block confirming your Product addition.
- Watch our YouTube Tutorial: https://youtu.be/chNz_z8cqEE



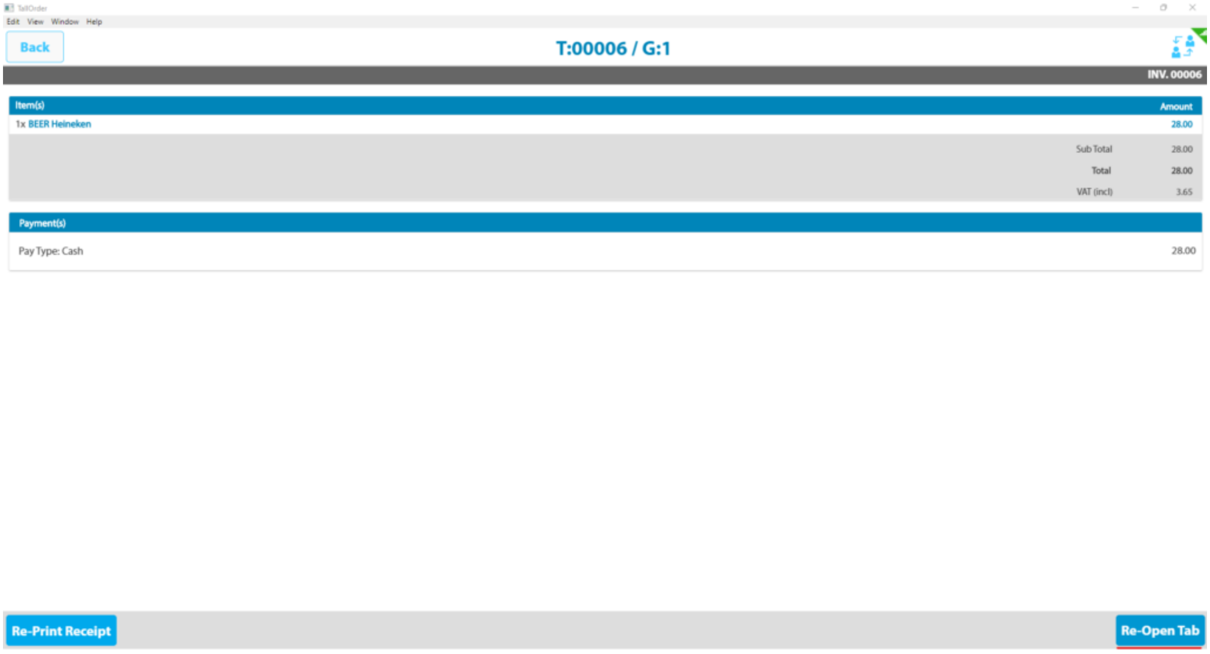
How to Cash Up and End Shift

- On the TallOrder home screen, go to the ‘Settings’ button on the left of the screen. This is represented by three horizontal lines.
- When the drop-down menu appears, please select ‘End Shift’ to continue.
- You will be directed to the ‘End Shift’ totals. Click ‘Next’ to continue.
- Please add in your own amount in order to balance the totals.
- If needed, please add any notes to the ‘Notes’ section at the top of the page.
- Next, click on ‘Manager Sign Off’ and enter the Manager Pin to confirm.
- Your Shift is now complete. From here, you can automatically start a New Shift if necessary. You can add your float amount (if applicable) or simply select ‘Start Shift’ to start.
- Watch our YouTube Tutorial: https://youtu.be/i2-mZ3jDEt4



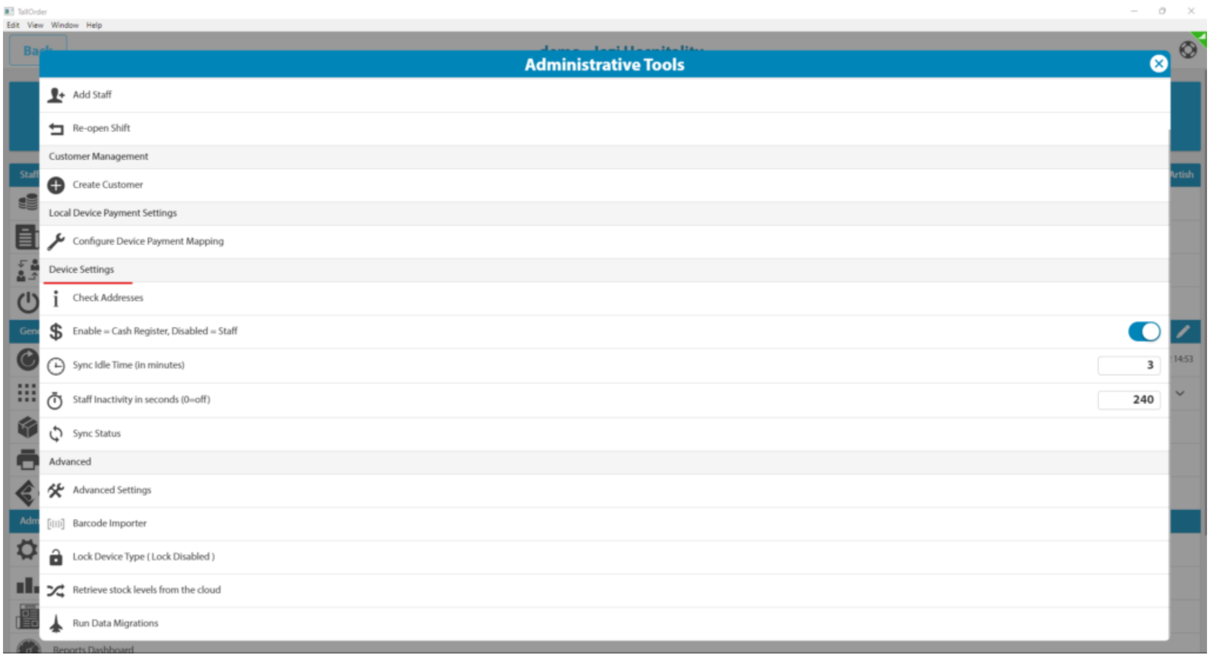
How to Reopen a Closed Tab

- On the TallOrder home screen, click on the Tabs button. This icon is represented by a Knife and Fork.
- Once opened, you will be able to see what Tabs are currently open under the shift.
- Under the Closed Tabs section, please click on ‘Show Closed Tabs’ button.
- Here, you can see the Tabs have already been closed. Select the tab you would like to reopen.
- When you click on the tab, you will be presented with the relevant information pertaining to that tab.
- At the bottom right-hand side of the page, there is an option to Re-open Tab. Select to continue.
- Enter Manager Pin to complete.
- Watch our YouTube Tutorial: https://youtu.be/MWAt5P03Uok

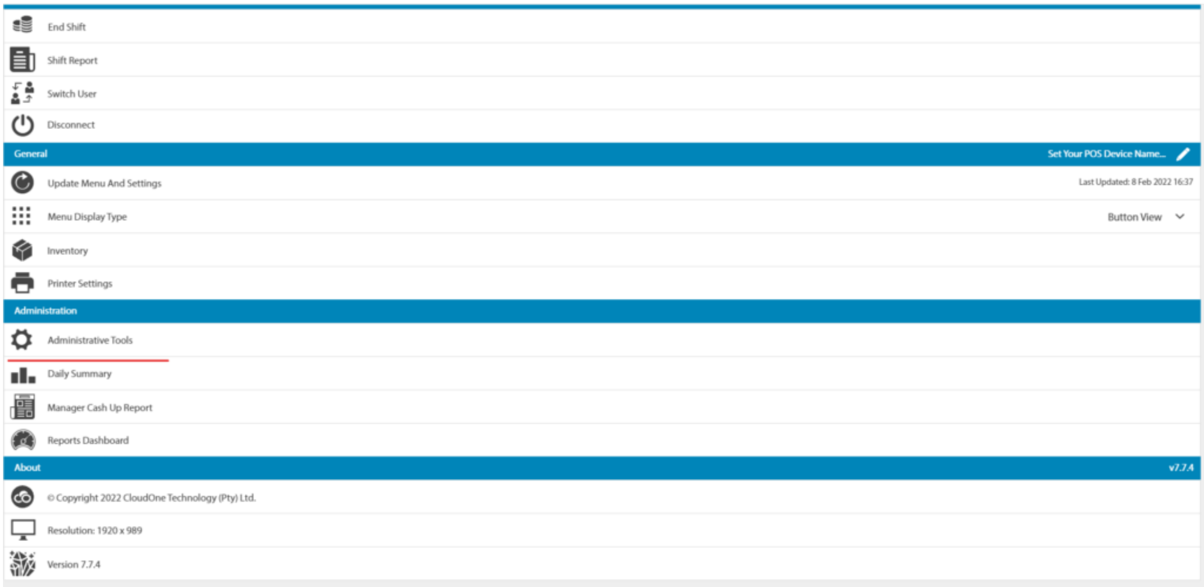


How to Check Device Addresses

- Once in the Administrative Settings Window click on the “Check Addresses” Tab.
- You will be redirected to a window in which all your linked device’s addresses will be displayed.
- You can edit these details on the TallOrder Admin Dashboard.

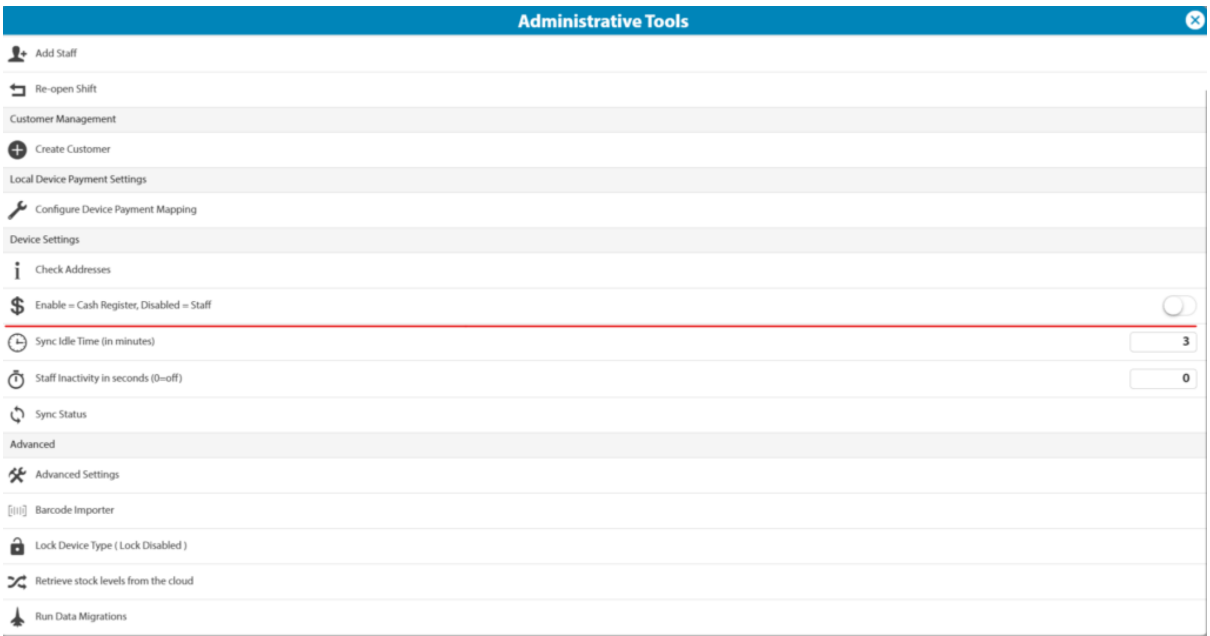


How to Choose How your Petty Cash is allocated



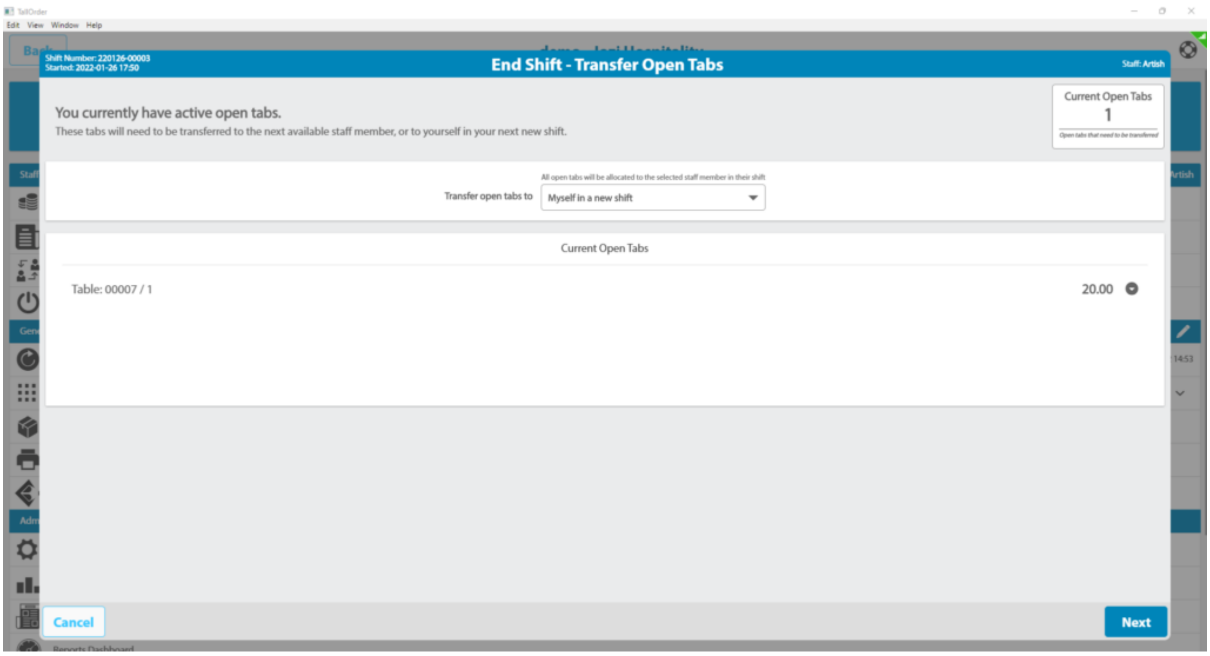
- Once in the Administrative Settings Window scroll down to the "Enable= Cash Register, Disable= Staff".

- Here you can choose whether a petty cash amount is allocated per staff member or whether a petty cash amount is allocated to the cash register for the whole day.
- Click on the blue slider on the right of the tab to indicate your choice- the slider will be blue if you choose to allocate your petty cash to the cash register.



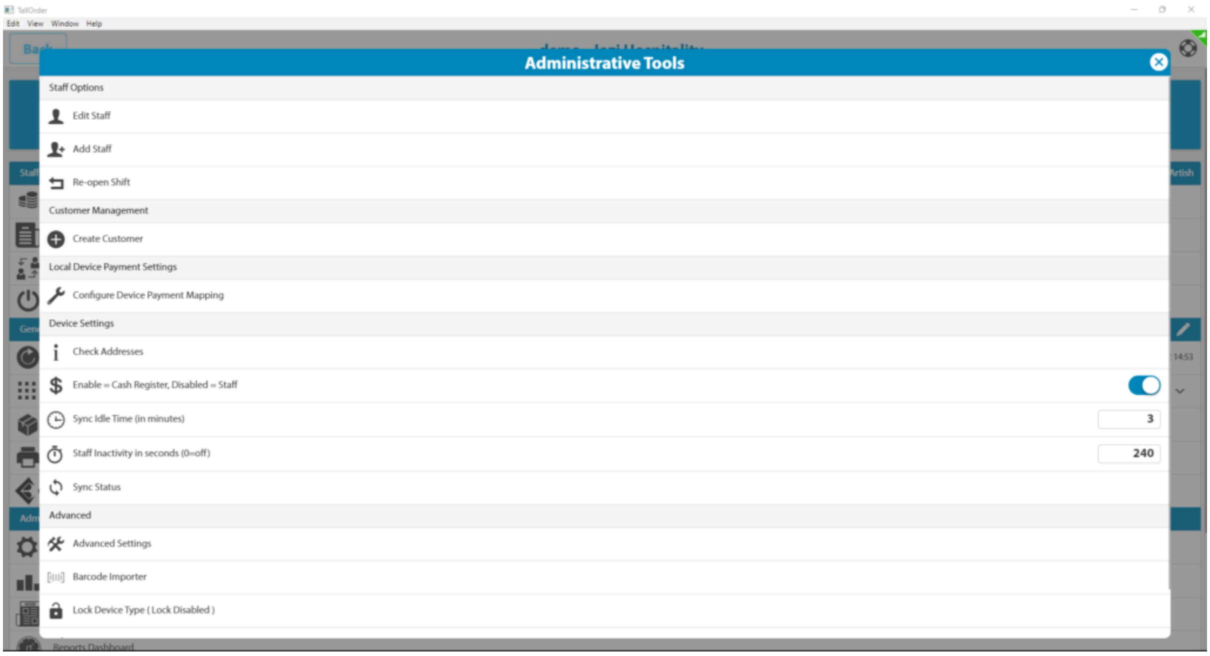
How to Transfer Tabs

- On the TallOrder home screen, click on the Settings icon on the top left-hand side of the screen. This is represented by three horizontal lines.
- Once the drop-down menu appears, please click on ‘End Shift’.
- Please review the end shift totals and details before continuing.
- Click on ‘Next’ to proceed.
- Here, you will be able to transfer your tab. You will be presented with the open tabs that can be transferred. Please select the tab needed to be transferred.
- On the top right-hand side of the screen, you can select where the current tab can be transferred to.
- Select the staff member name and then add the end shift amount details to continue.
- You can also add additional notes where needed.
- The confirmation of the transferring tab process can be confirmed with a Manager Pin entry.
- Watch our YouTube Tutorial: https://youtu.be/hxUDa_XBaHc



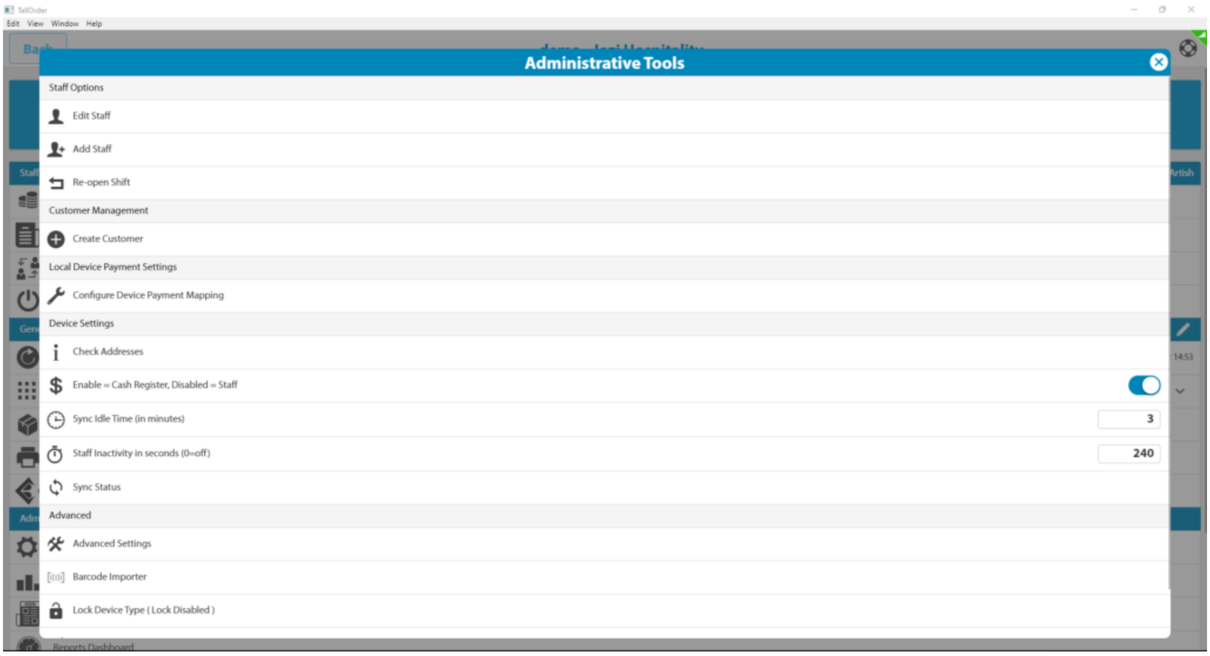
How to Edit Staff Members

- Once in the Administrative Settings Window click on the “Edit Staff” Tab.
- You will be redirected to a list of your current staff members.
- Click on the staff member you wish to edit and you will be presented with their details.
- You can edit their details and then click the “Update” button at the bottom.



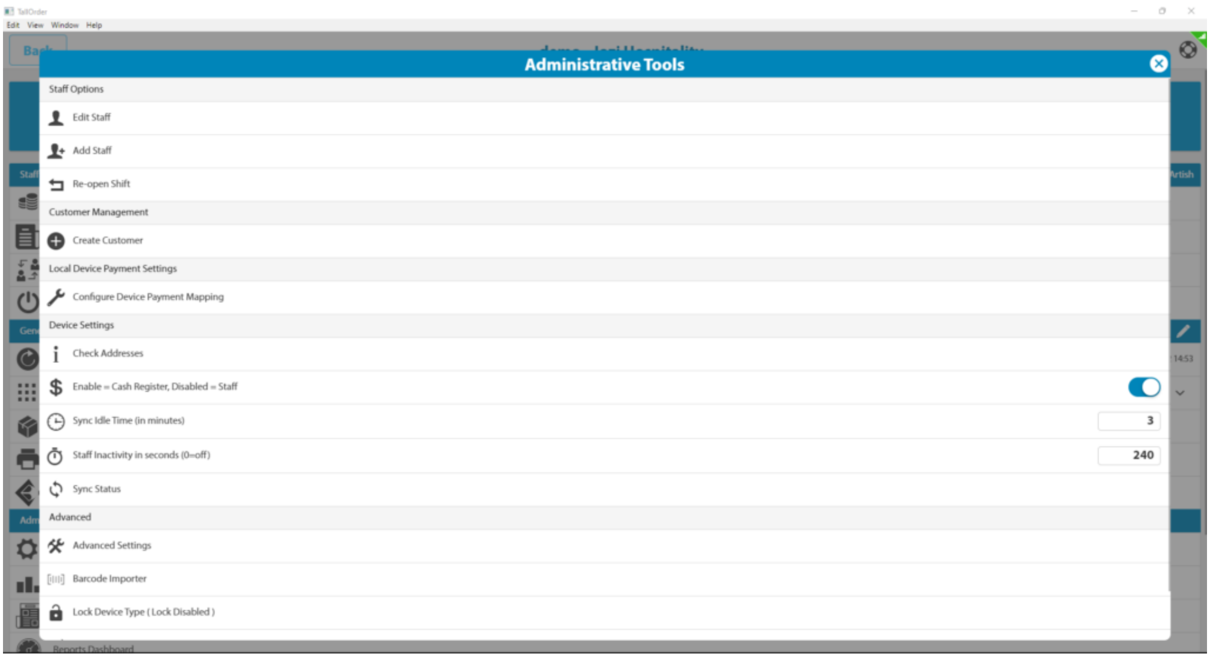
How to Add a New Staff Member

- Once in the Administrative Settings Window click on the “Add Staff” Tab.
- You will be presented with a form in which you can add the new staff member’s details.
- Make sure you pick the correct staff role.
- Once you have filled in all the details click the “Add Staff” button at the bottom.

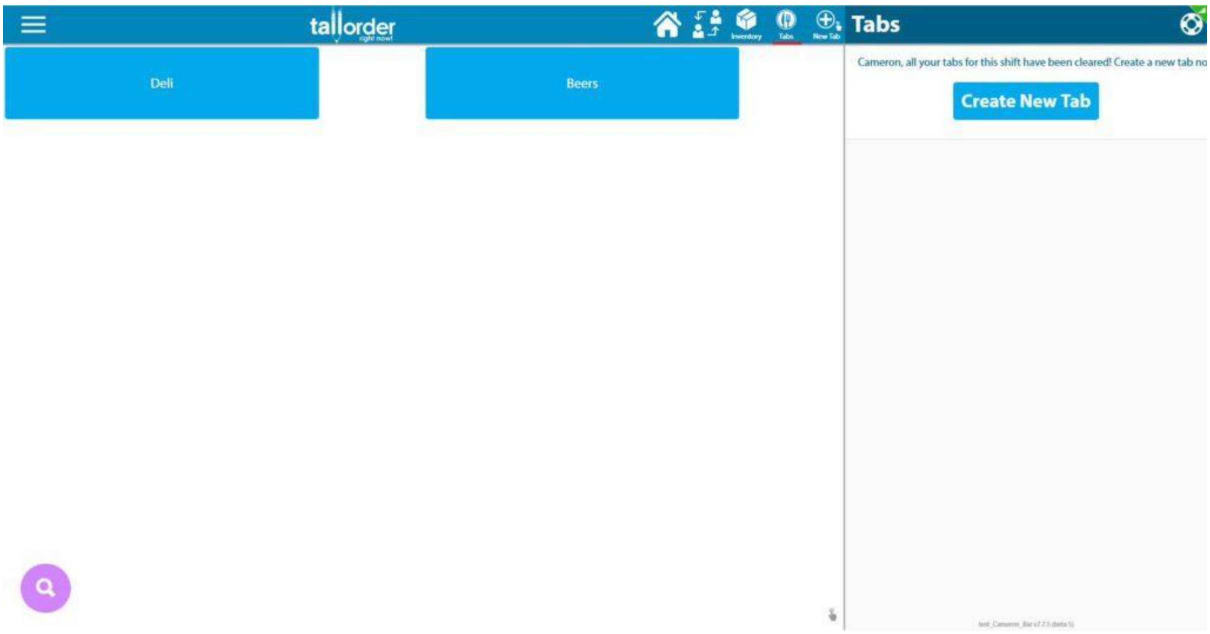


How to Re-Open a Shift

- You can re-open specific staff member's shifts by, once in the Administrative Settings Window, clicking on the "Re-Open Shift" Tab.
- You will be redirected to a list of current staff members.
- Click on the Staff Member whose shift you wish to re-open.
- You will then be re-directed to a window displaying those that staff members closed shifts.
- Click on the shift which you would like to re-open. You will be presented with the option to do so. Click "Confirm".



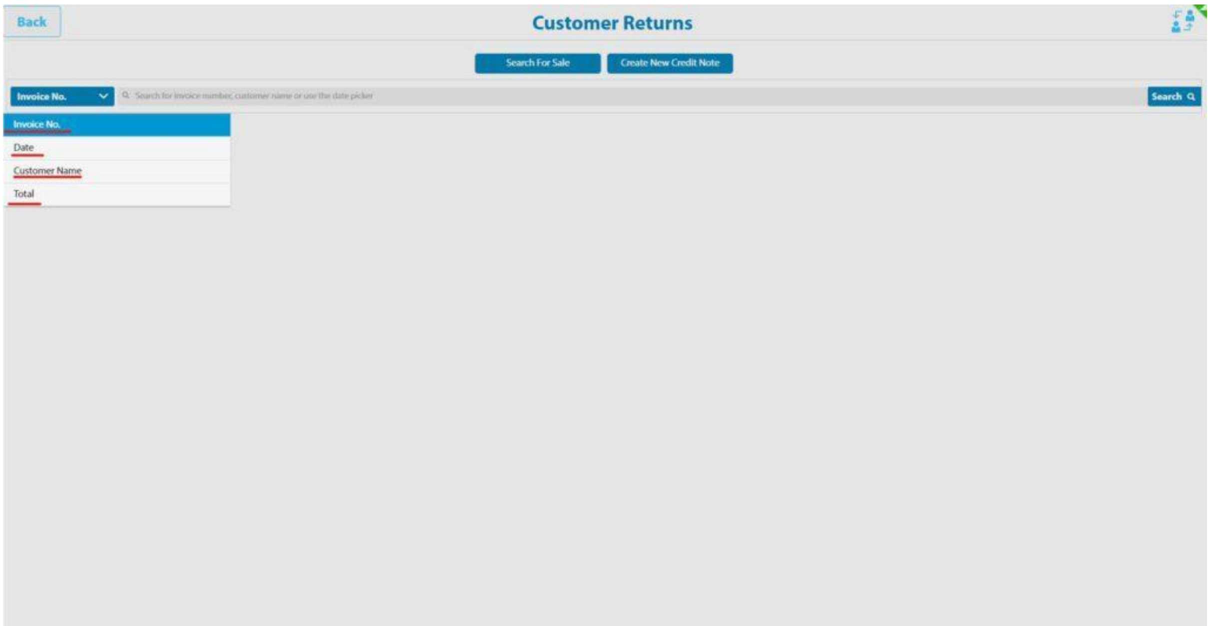
From the POS main menu click on Tabs option on the top right hand corner.



From the next screen please click on the Refunds button in the left-hand corner.

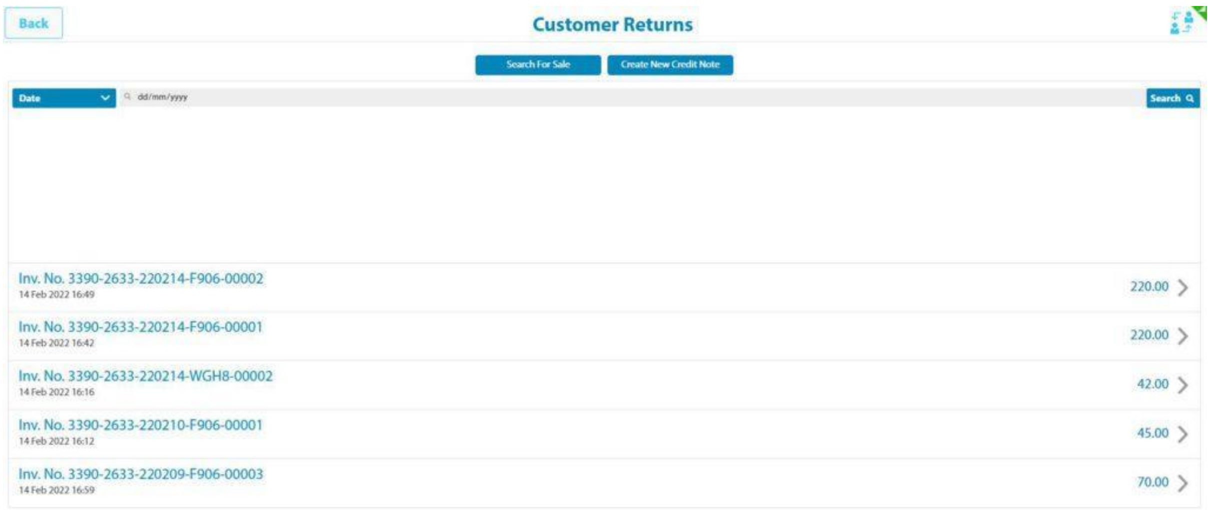
Next you can click on 'Search For Sale'

You can either search by Invoice Number, Date, Customer Name or by Total.



For this example we are going to be searching by date.

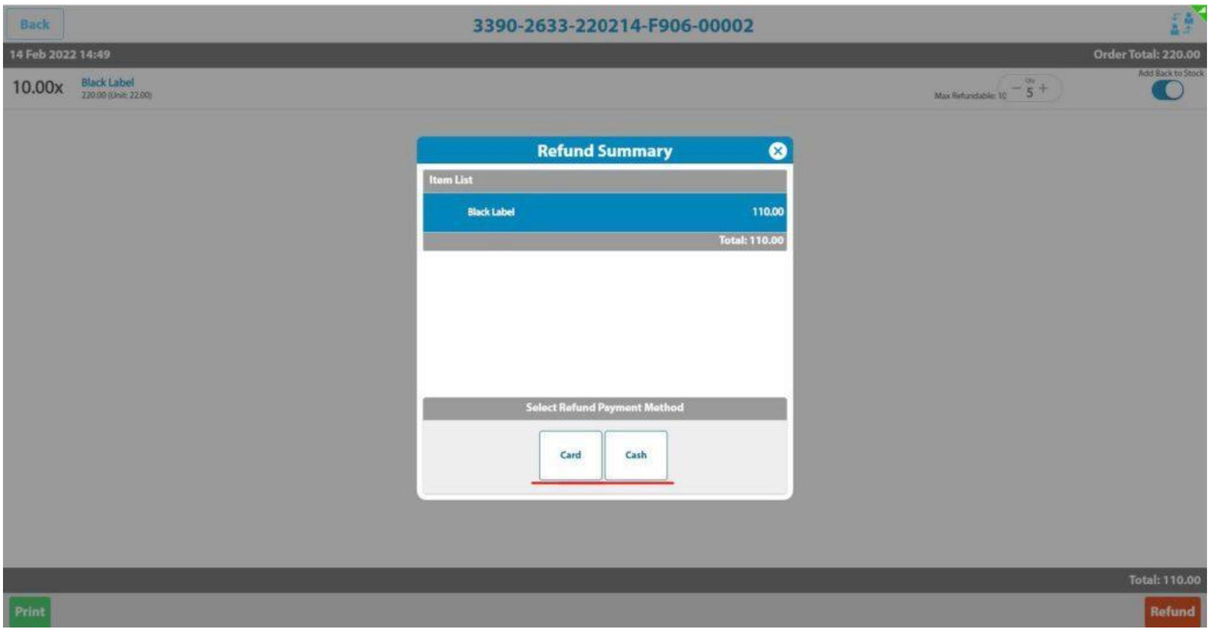
Once you have chosen your filter and entered the correct information you can then click on the search button on the right.

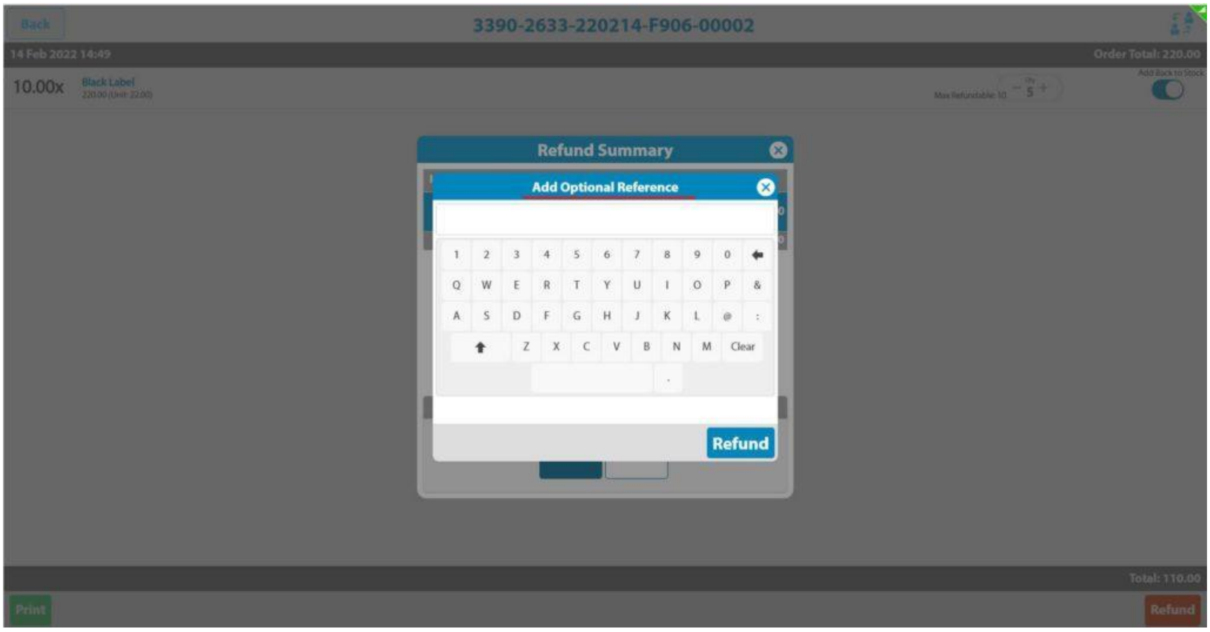


Once you have chosen the correct Tab you can the refund the item or multiple items. If the items was a stock item, please click on the Toggle that say's 'Add Back to Stock'

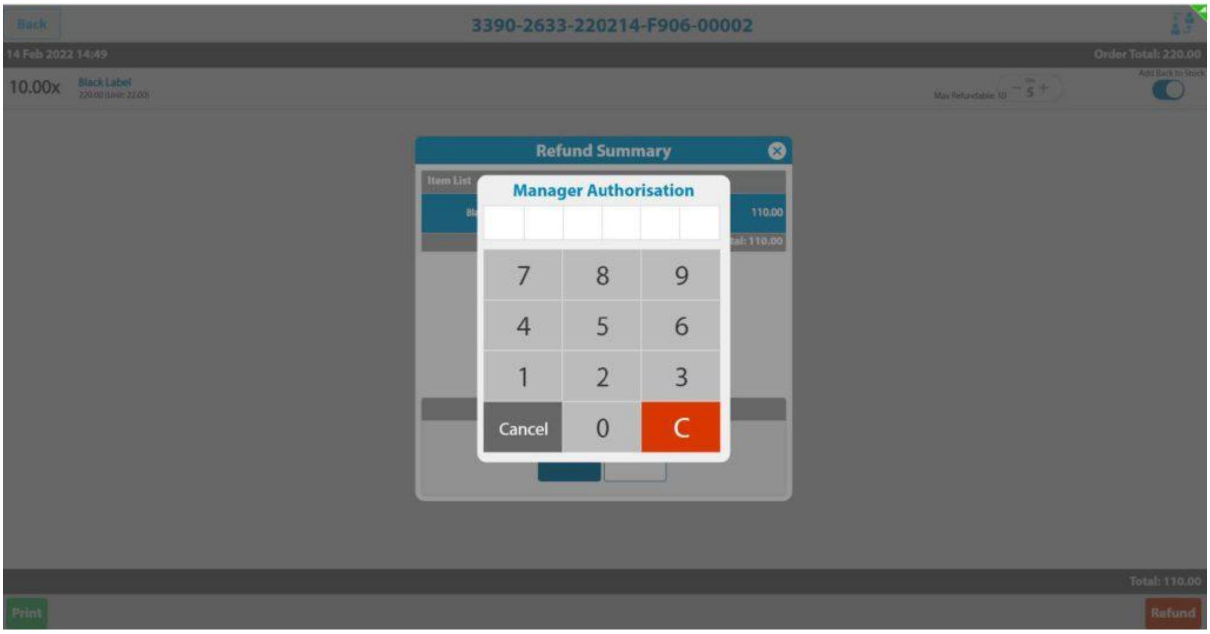
Once you have chosen the correct item and the correct amount that needs to be refunded, please click on the right-hand bottom corner.

From the next screen you can then choose to refund with a card or cash.
Once you have selected the correct payment method another pop up will appear where you can add an Optional reference.





If you need to put in an Reference you can do it there and when that is done click on Refund.
You will be asked a managers PIN as well.



Once that has been done the refund will be recorded on the system.