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retail systems for a digital world

How-To Guide Configuring Hospitality – Menus

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Introduction

The purpose of this guide is to provide a foundational understanding of the options and capabilities available when configuring Hospitality specific Menus related to product sales and other functions.

This guide will cover the configuration for the following Hospitality specific menus:
- Restaurant Course Menu
- Restaurant Bar Menu
- Restaurant Functions Menu
- Restaurant Bar Functions Menu
- Hospitality Modify Item Functions Menu
- Restaurant Bill Split Menu
- Restaurant Manager Functions Menu
- Restaurant Non-Table Sales Functions Menu
- Restaurant Transaction Notes Functions Menu
- Restaurant Item Notes Functions Menu
- Tender Menu

Prior Training / Experience

You should be familiar with the following:
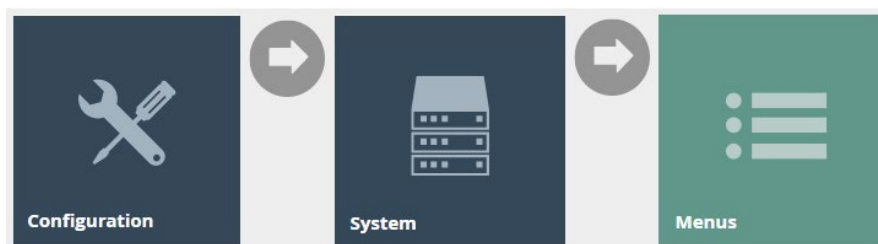- Estate Manager Configuration
- Data Broadcasting

POS Menus

Enactor Applications that present User Interfaces (UIs) use **Menus** as the principal means to navigate and access functionality of the Application. Menu configuration provides the first level control over what Application Functionality individual Users and groups of Users may access and how they navigate to the functions they require.

Menus are associated with a **Locale**, **User Role** and **Menu Group**. Before configuring menus, the related configuration elements must be understood and configured. From the POS User perspective some POS Menu options select other Menus or refer to software functions. In most hospitality POS Menus, the action behind the Menu Option is an Event; a Function or a Process defined within the constraint of the Menu Set.

Restaurant Menu Configuration

The Menu Maintenance application can be accessed through:
Configuration -> System -> Menus

Creating a Linked Menu

A linked menu is a series of menus linked to one another to form one large menu. Linked menus can be defined when configuring food menus to be used in the POS application. Before creating the main Restaurant Course menu or Restaurant Bar menu, we should create linked menus for each product category. This would enable to add these linked menus to the main Restaurant Course menu or Restaurant Bar menu which will be configured later.

Following is an example of creating a Linked Menu for the product category Champagne and adding an item to it:

To create a new linked Menu, select **Create New Menu** on the Menu Maintenance page**.**

You will be presented with the following options.

Set the appropriate values on the **Menu Maintenance** screen as follows:

Configuration	Description
Menu Set	This selection determines the basic elements of functionality offered by the Application. Select **POS** from the drop-down list.
Role	Role provides the necessary permissions to access the function options of the Menu. Select **Restaurant-UK** from the drop-down list.
Menu Group	This selection allows to identify a set of Menus associated the with Location(s) in which its use is enabled. Select **United Kingdom** from the drop-down list.
Locale	Defines the defines locale in which the Menu may be used. Select **English (UK)** from the drop-down list.
Menu ID	Must be a unique ID that identifies an Application Context in which the Menu will be requested. Can contain up to a maximum of 30 alphanumeric characters.

 Select **Create.**

You will be presented with the following options to complete creating the new linked menu:

Enter a **Name** that can contain up to maximum of 20 alphanumeric characters.

Select **Tree** from the Menu Type drop-down.

Select **Hospitality** from the Menu Category drop-down.

Select the Menu root **Champagne**, and the menu options will appear at the bottom left corner.

Select **Add**.

From the list select **Add a new Button** to proceed.

Menu Maintenance - General Tab

On adding a basic menu item, the general tab captures the main data associated with the item.

Set the appropriate values on the **General** tab as follows:

Configuration	Description
Event	Select **Sell Product** from the drop-down list.
Button Label	Enter a value that describes what the product ID button will sell on selection, this will be displayed on the POS Application.
Position	Enter a numeric value that will indicate where the menu item is to be displayed in the Menu Order.

Menu Maintenance - Data Tab

The Data Tab allows the user to set a restaurant product for sale in the Restaurant Courses menu. Here the product must be specified in the data tab. This can be done by clicking on the **Product Search icon** in the Data tab.

After configuring both the tabs, select **Save** to complete creating the new Product in the Menu Link.

Restaurant Course Menu

This is the main menu which displays all the Restaurant Products for the Restaurant Dine-in location. If you have a Dine-in location in your Restaurant and you want to list your Restaurant Products to sell, this is the menu that must be created.

Following is a configured Restaurant Course Menu in the Estate Manager:

Creating a Restaurant Course Menu

To create a root Restaurant Course menu with the link menu created, select **Create New Menu** on the Menu Maintenance page.

You will be presented with the following options:
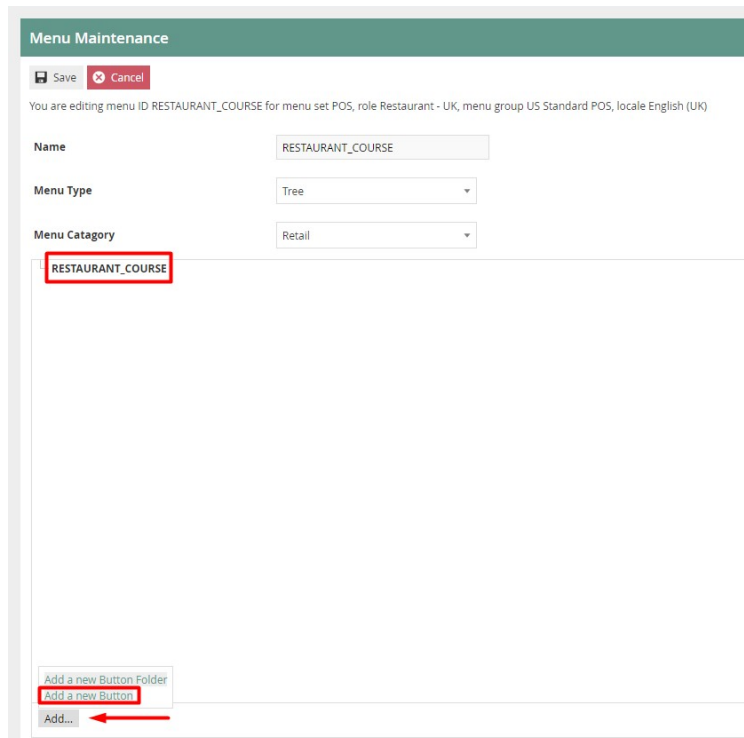
Select **Restaurant Course** from the Menu ID drop-down list.

Select **Create**.

You will be presented with the following options to complete creating the new restaurant course menu:

Enter a **Name** that can contain up to maximum of 20 alphanumeric characters.

Select **Tree** from the Menu Type drop-down.

Select the Menu root **RESTAURANT_COURSE**, and the menu options will appear at the bottom left corner.

Select **Add.**

From the list select **Add a new Button** to proceed.

You will be presented with the following options:

Set the appropriate values on the **General** tab as follows:

Configuration	Description
Type	Select **Menu Link** which will provide a reference to the link Menu that was previously defined independently which requires to be added to this course menu.
Menu	Select the appropriate Menu that needs to be linked to, from the drop-down list.
Button Label	This is a fixed text which will appear on Tile of Menu tree entry that will select the menu folder. Can be alphanumeric and contain a maximum of 30 characters. Enter an appropriate Button label name.
Image URL	Captures the URL identifying an image to be displayed on the button. Can be alphanumeric and contain a maximum of 100 character. Enter **Pos/Restaurant/item_button.png**
Pressed Image URL	Captures the URL of any image to be displayed on the button when it is pressed. Enter **Pos/Restaurant/item_button_pressed.png**

After configuring both the tabs, select **Save** to complete creating the new Restaurant Course Menu item.

This menu can be accessed in the POS as follows:
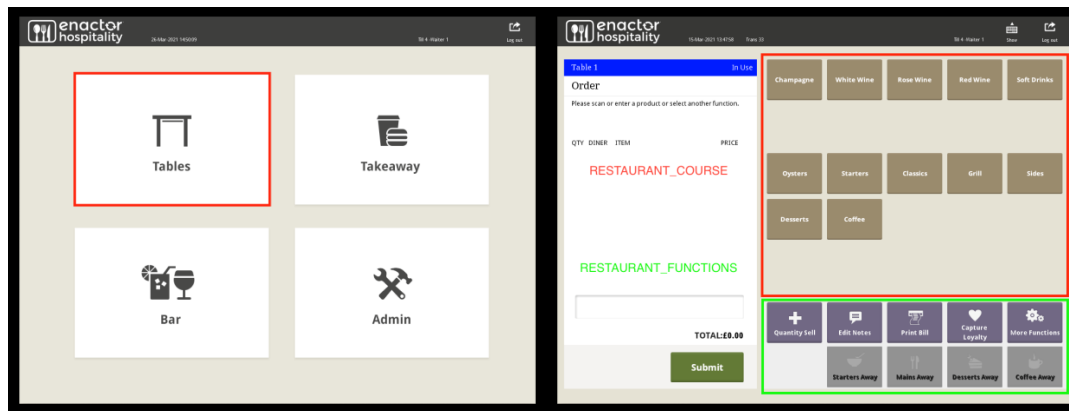
The menu represented by RESTAURANT_COURSE in the above image is the one to be configured.

Restaurant Bar Menu

This is the main menu which displays all the Restaurant Products for the Restaurant Bar location. If you have a Bar location in your Restaurant and you want to list your Restaurant Products to sell, this is the menu that must be created.

When creating this new menu, make sure to select **Restaurant Bar** from the Menu ID drop-down list.

Following is a configured Restaurant Bar Menu in the Estate Manager:

Following are the events which can be configured for this menu:

Event Name and Data	Description	Privileges
Sell Product Data: Product ID	Allows the user to set a restaurant product for sale in this menu. Here the product must be specified in the data tab. This can be done by clicking on the Product Search icon in the Data tab. 	No privileges are required.

This menu can be accessed in the POS as follows:

The menu represented by RESTAURANT_BAR in the above image is the one to be configured.

Restaurant Functions Menu

This is the main menu which displays all the Restaurant related functions in the Restaurant Dine-in location.

When creating this new menu, make sure to select **Restaurant Functions** from the Menu ID drop-down list.

Following is a configured Restaurant Functions Menu in the Estate Manager:

Menu Maintenance

💾 Save   ⊗ Cancel

You are editing menu ID RESTAURANT_FUNCTIONS for menu set POS, role Restaurant - UK, menu group UK MENU TESTING, locale English (UK)
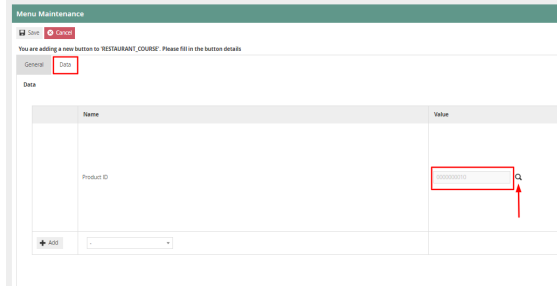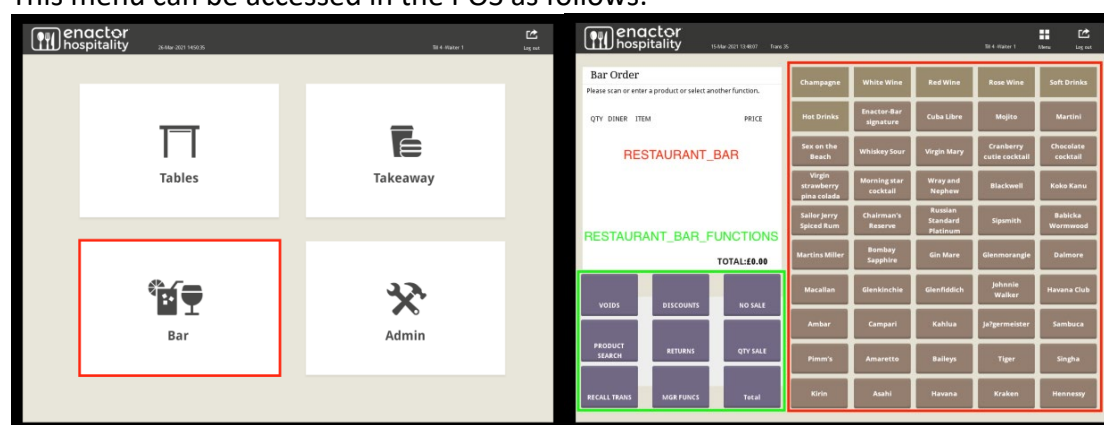
Name	RESTAURANT_FUNCTIONS
Menu Type	Tree ▾
Menu Catagory	Hospitality ▾

⊟ RESTAURANT_FUNCTIONS
— 1 - PrintBill
— 2 - ManagerFunctions
— 3 - Add Notes
— 4 - CaptureLoyalty
— 5 - Total

Add...

Following are the events which can be configured for this menu:

Event Name and Data	Description	Privileges
Print Bill	Allows the user to print the bill for a table (note - this is also available from one of the quick launch buttons on each table).	No privileges are required.
Manager Functions	Allows to user to access the Restaurant Manager Functions menu.	No privileges are required.
Add Notes	Allows to user to access the Restaurant Transaction Notes Functions menu.	No privileges are required.
Total	Enables to start the Tender process by taking the user to the Tender menu.	No privileges are required.

This menu can be accessed in the POS as follows:
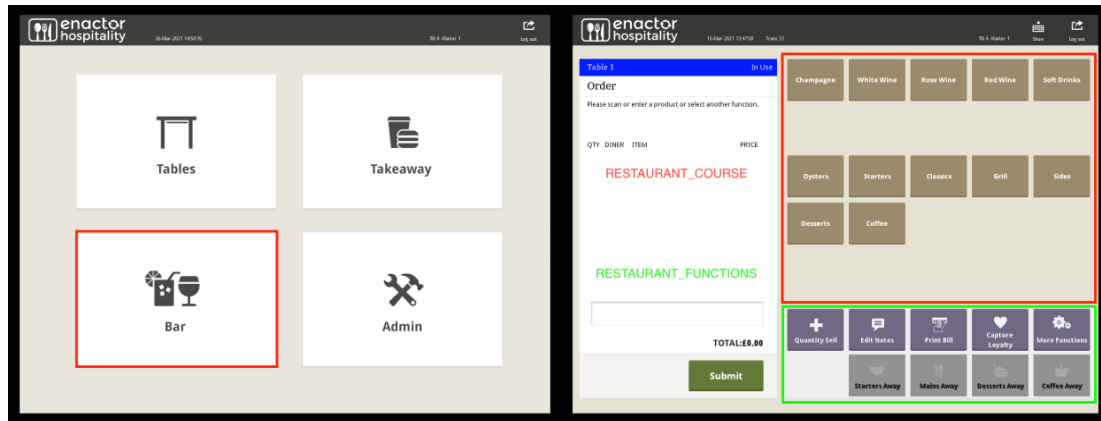
The menu represented by RESTAURANT_FUNCTIONS in the above image is the one to be configured.

Restaurant Bar Functions Menu

This is the main menu which displays all the Restaurant related functions in the Restaurant Bar location.

When creating this new menu, make sure to select **Restaurant Bar Functions** from the Menu ID drop-down list.

Following is a configured Restaurant Bar Functions Menu in the Estate Manager:

The events that are available for configuration in this menu are the same set of events available for the Restaurant Functions menu.

This menu can be accessed in the POS as follows:
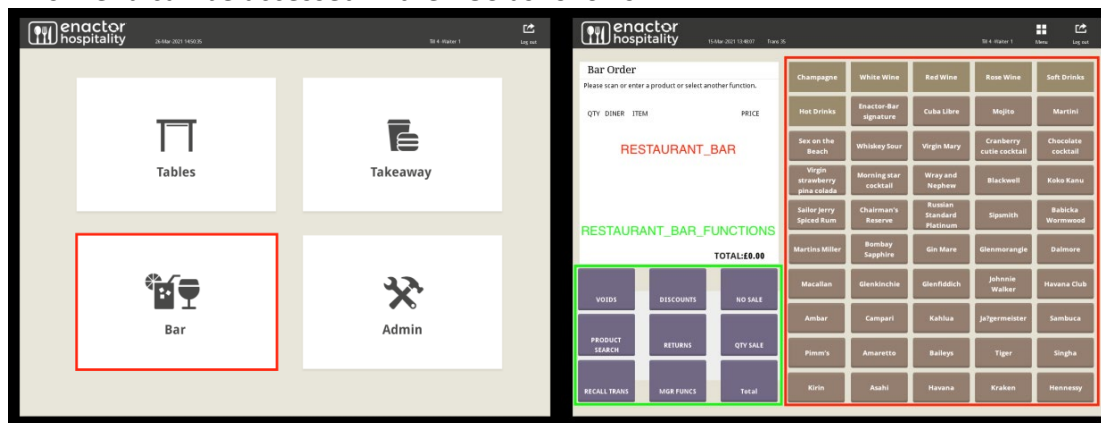
The menu represented by RESTAURANT_BAR_FUNCTIONS in the above image is the one to be configured.

Hospitality Modify Item Functions Menu

This is the menu which allows to make modifications to the list of items added in the order.

When creating this new menu, make sure to select **Hosp Modify Item Functions** from the Menu ID drop-down list.

Following is a configured Hospitality Modify Item Functions Menu in the Estate Manager:

Following are the events which can be configured for this menu:

Event Name and Data	Description	Privileges
Re Order Item	Allows the operator to select an item already in the virtual basket, then re-order it (including any options selected) with one button press.	No privileges are required.
Modify Sales Item	Allows the operator to edit the item, changing options selected or editing the item message.	No privileges are required.
Reallocate Item To Diner	Allows an item to be allocated to a different diner.	No privileges are required.
On Hold	Adds a text message of On Hold to the item when it is submitted to the kitchen.	No privileges are required.
Add Message	Allows the operator to add a message to the item that will be submitted to the kitchen.	No privileges are required.
Edit Notes	Allows the operator to edit notes already added to the item.	No privileges are required.
Serve With Course	Allows the operator to allocate an item to a course other than the one it is configured against (e.g. customer orders a starter as a main course).	No privileges are required.
Selected Item Void	Allows the operator to void the selected item.	No privileges are required.

This menu can be accessed in the POS as follows:
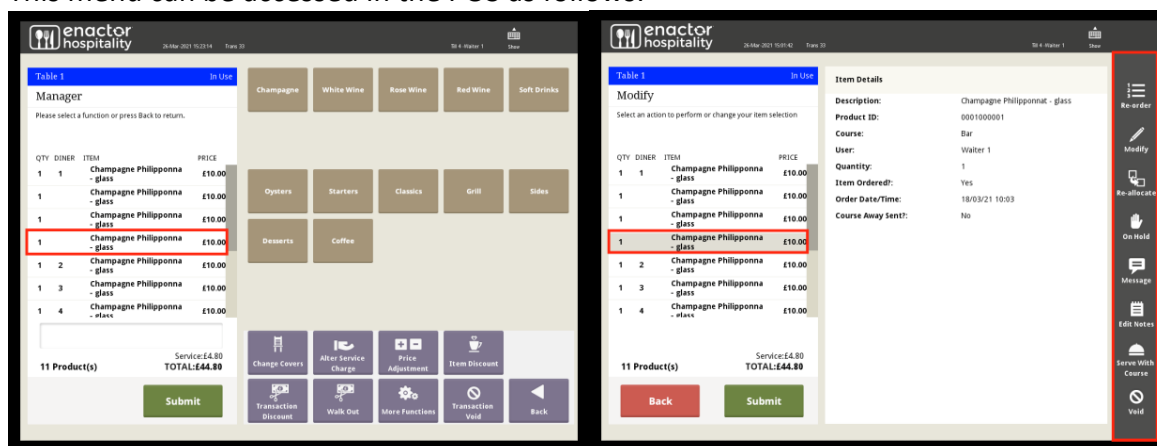
The menu appears on the right when the item is selected.

Restaurant Bill Split Menu

This is the menu which allows to split the total amount of the restaurant bill based on the split requirement.

When creating this new menu, make sure to select **Restaurant Bill Split Menu** from the Menu ID drop-down list.

Following is a configured Restaurant Bill Split Menu in the Estate Manager:

Following are the events which can be configured for this menu:

Event Name	Description	Privileges
Full Payment Pressed	Enables the transaction to be paid in full without any bill splitting.	No privileges are required.
Split By Value Pressed	Enables the transaction total to be split by the number entered by the POS operator.	No privileges are required.
Split By Item Pressed	Allows the operator to split the bill per item in the transaction.	No privileges are required.
Split By Customer Pressed	Once selected, a split is created for each diner on the table and each diner's items are automatically allocated to their split.	No privileges are required.
Individual Payment Pressed	Allows an operator entered cash amount to be paid off the value of the transaction.	No privileges are required.

This menu can be accessed by clicking on the total button of another menu, and would appear in the POS as follows:
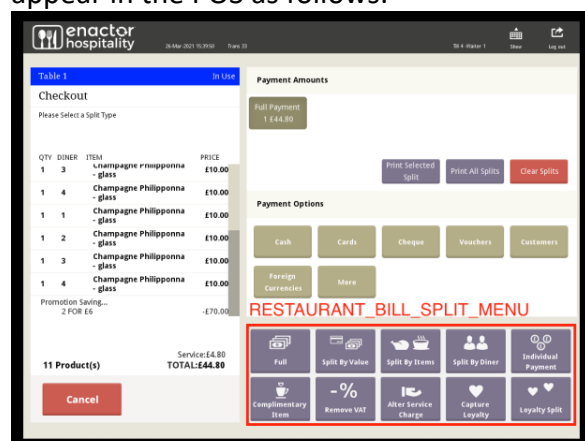
The menu represented by RESTAURANT_BILL_SPLIT_MENU in the above image is the one to be configured.

Restaurant Manager Functions Menu

This is the menu which allows to access and run Manager based events and functions for a Restaurant.

When creating this new menu, make sure to select **Restaurant Manager Functions** from the Menu ID drop-down list.

Following is a configured Restaurant Manager Functions Menu in the Estate Manager:

Menu Maintenance

💾 Save ❌ Cancel

You are editing menu ID RESTAURANT_MANAGER_FUNCTIONS for menu set POS, role Restaurant - UK, menu group UK MENU TESTING, locale English (UK)

Name	RESTAURANT_MANAGER_FUNCTIONS

Menu Type	Tree ▼

| Menu Catagory	Retail ▼

RESTAURANT_MANAGER_FUNCTIONS
- 1 - ChangeCovers
- 2 - ModifyServiceCharge
- 3 - PriceOverride
- 4 - ItemDiscount
- 6 - TransactionDiscount
- 7 - NoSale
- 8 - More Functions
- 9 - TransactionVoid
- 10 - Back Button

Add...

Following are the events which can be configured for this menu:

Event Name	Description	Privileges
Modify Service Charge	Enables to modify the service charge of the order.	No privileges are required.
Change Covers	Allows the operator to amend the number of diners originally entered on the table.	No privileges are required.
Cancel Course Away	Enables the operator to cancel an Away Message that was submitted by mistake.	No privileges are required.
Change Table Status	Enables a user to change the status of a table.	No privileges are required.
Merge Transaction By Table	Enables the transactions on two tables to be merged into one transaction on one table.	No privileges are required.

This menu can be accessed by clicking on the Manager button of another menu, and would appear in the POS as follows:
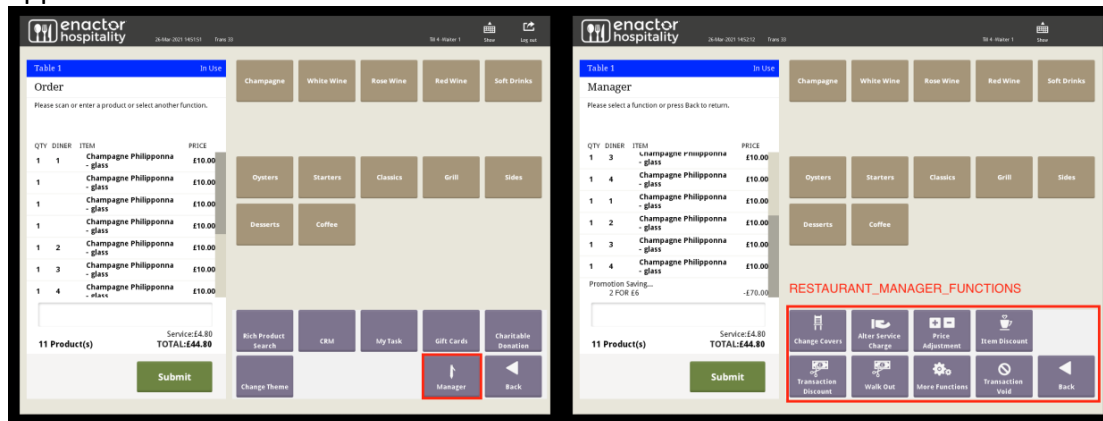
The menu represented by RESTAURANT_MANAGER_FUNCTIONS in the above image is the one to be configured.

Restaurant Non-Table Sales Functions Menu

This is the menu which allows to access and run Admin related functions of a Restaurant.

When creating this new menu, make sure to select **Restaurant Non Table Sales Functions** from the Menu ID drop-down list.

Following is a configured Restaurant Non Table Sales Menu in the Estate Manager:

Following are the events which can be configured for this menu:

Event Name	Description	Privileges
Set Table Out Of Use	Enables to change the status of the table to "Out of Use".	No privileges are required.
Set Table In Use	Enables to change the status of the table to "Out of Use".	No privileges are required.
Set Table Reserved	Enables to change the status of the table to "Out of Use".	No privileges are required.
Remove Table Reservations	If there are any table reservations, this enables to remove them.	No privileges are required.
Product Search	Enables to search for a Product of the list of Products configured.	enactor.pos.AllowProductSearch

This menu can be accessed in the POS as follows:
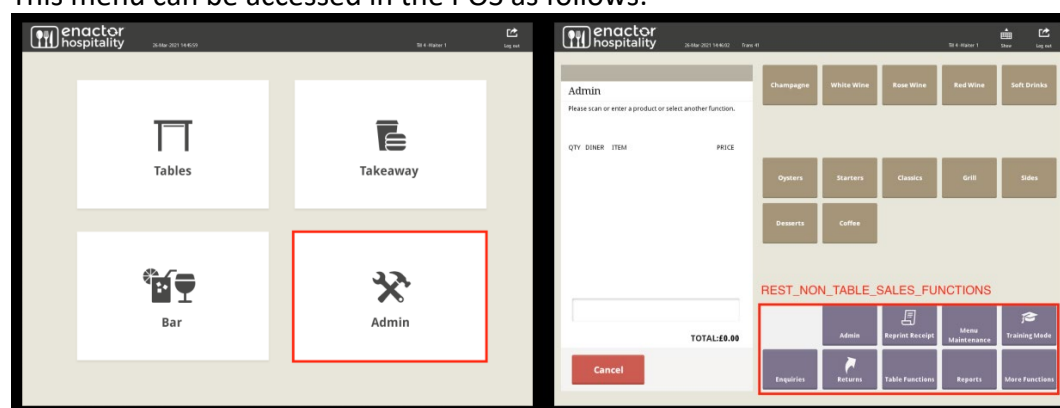
The menu represented by REST_NON_TABLE_SALES_FUNCTIONS in the above image is the one to be configured.

Restaurant Transaction Notes Functions Menu

This is the menu which allows to attach notes to the current transaction of the Restaurant.

When creating this new menu, make sure to select **Restaurant Transaction Notes** from the Menu ID drop-down list.

Following is a configured Restaurant Transaction Notes Functions Menu in the Estate Manager:

Following are the events which can be configured for this menu:

Event Name	Description	Privileges
Free Text	Enables to enter any text to attach with the transaction.	No privileges are required.
Default Note Selected Data: Default Note Value	Enables to have the default note attached with the transaction. When configuring the Default Note, the value that you want to have as your Default Note should be specified in the data tab.	No privileges are required.

This menu can be accessed by clicking on the Edit Notes button of either the Restaurant Functions or Restaurant Bar Functions menu, and would appear in the POS as follows:
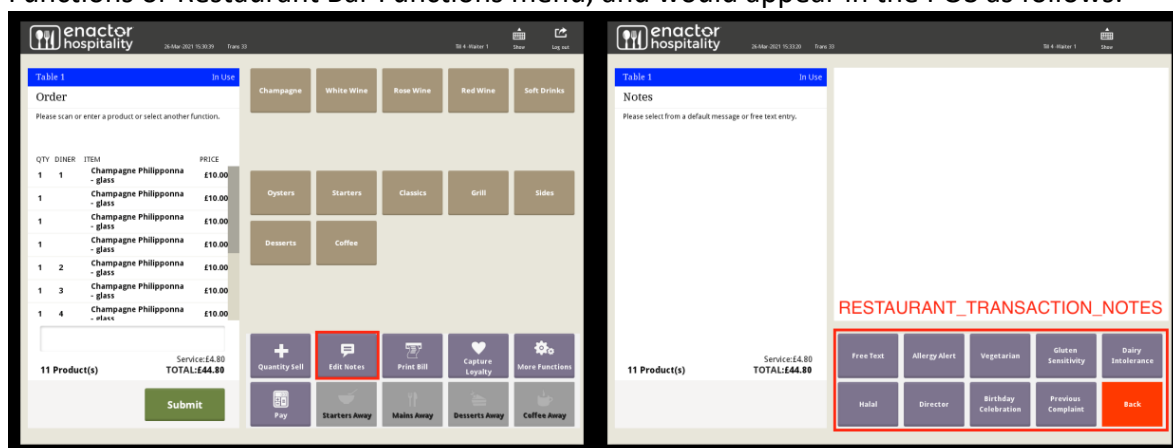
The menu represented by RESTAURANT_TRANSACTION_NOTES in the above image is the one to be configured.

Restaurant Item Notes Functions Menu

This is the menu which allows to attach notes to each item of the current transaction.

When creating this new menu, make sure to select **Restaurant Item Notes** from the Menu ID drop-down list.

Following is a configured Restaurant Item Notes Menu in the Estate Manager:

Following are the events which can be configured for this menu:

Event Name	Description	Privileges
Free Text	Enables to enter any text to attach with the transaction.	No privileges are required.
Default Note Selected Data: Default Note Value	Enables to have the default note attached with the transaction. When configuring the Default Note, the value that you want to have as your Default Note should be specified in the data tab.	No privileges are required.

This menu can be accessed by clicking on the Edit Notes button of the Hospitality Modify Item Functions Menu in the POS as follows:
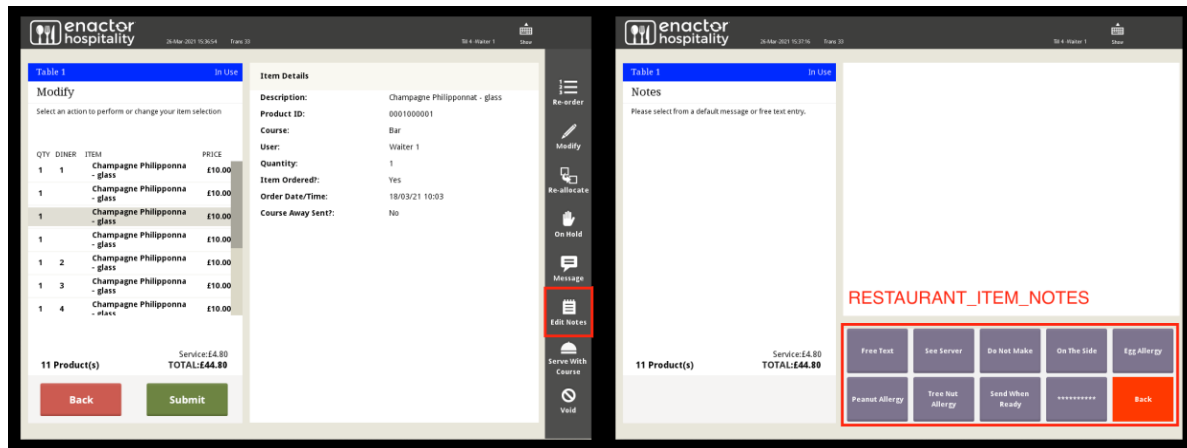
The menu represented by RESTAURANT_ITEM_NOTES in the above image is the one to be configured.

Tender Menu

This is the menu which allows to make tender transactions after the products have been added and are ready to be totalled.

When creating this new menu, make sure to select **Tender** from the Menu ID drop-down list.

Following is a configured Tender Menu in the Estate Manager:

Following are the events which can be configured for this menu:

Event Name	Description	Privileges
Cash Tender Data: enactor.mfc.TenderId	Enables to make cash-based tender transactions. Here the Tender ID must be specified in the data tab with a Cash Tender that has already been configured.	enactor.pos.CashTenderAllowed

This menu can be accessed by clicking on the Total button of another menu in the POS as follows:
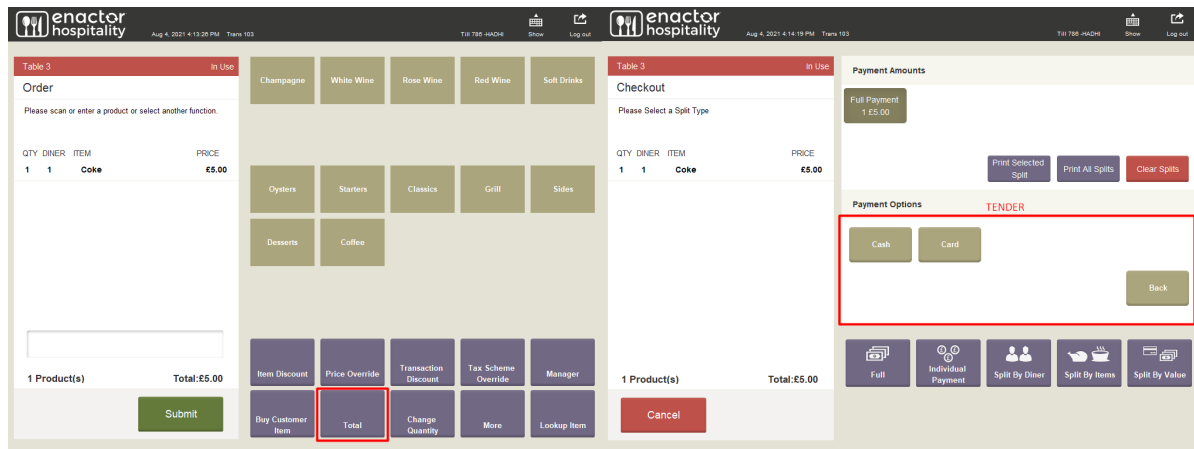
The menu represented by TENDER in the above image is the one to be configured.

About This Document

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The amendment history of this document can be found in the table below.

Current Document Version information

Document Version 1.0
Product Version 2.6

Document Context

This document is part of the Enactor Product Documentation Series. All Enactor products include a comprehensive documentation set designed to improve understanding of the product and facilitate ease of use.

Document Inquiries

At Enactor we aspire to producing the highest quality documentation to reflect and enhance the quality of our product. If you find that the document is inaccurate or deficient in any way, please assist us in improving our standard by letting us know.
For matters of document quality or any other inquiries regarding this document please contact:
By Email: documentation@enactor.co.uk

Document History

The following versions of the document have been produced:

VERSION	STATUS	ISSUE DATE	AUTHOR	REASON FOR ISSUE
1.0	Initial Draft	19/03/21	Savva Kontou	Initial version