

What's New in TouchBistro 6.1

TouchBistro 6.1 offers a new integration with a third party app: 7shifts. Pro users will discover noticeable speed improvements for operations that access the Mac server. We are also in the process of changing how staff types and rights work. In 6.1, you can now create your own custom staff types and assign rights to the staff types.

Consult these release notes for full details on these changes along with other significant improvements added in version 6.1.

Need More Help?

Email <u>support@touchbistro.com</u> if you are experiencing any issues with this update.

7shifts Integration

If you are a user of the 7shifts scheduling app, TouchBistro now integrates with the app.

To enable the Integration on TouchBistro, access Admin | Admin Settings. Tap on the new Integrations section. Tap 7shifts.



Slide **Enable** to the green position. Enter the **API Key** you received from 7shifts. Slide **Enforce Schedule** to the green position. This will ensure TouchBistro users can't clock in unless they are explicitly scheduled to work via 7shifts.

You must also visit **Admin | Admin Settings | Staff** and modify staff passcodes to match the **PunchIDs** entered for the matching staff profile.

| < Restaurant | | < Back | Edit Staff | Done/Save | | |
|--------------|------------------|--------------------|-------------------------------|----------------------------------|-------------------------------------|----------------|
| | г | | | | | |
| 82 | Του | 👤 🖍 🗙 <u>Robin</u> | Lee | | | Robin |
| | | Basic Info Locatio | ns / Departmer | its / Roles HR / Pay | roll Notes | |
| | Res | Hire date | 0000-00-0 | 00 | | Robin |
| | | | The date this en | nployee was hired on. | | |
| H | Lic | Wage | Hourly | v | | Lee |
| | | | Do not include t | he \$ sign. Example: 10.00 | | |
| <u>(</u> _) | Prir | Skill level | 1 (Beginn | er) * | | 555-545-2323 |
| | | Max weekly hours | | | | Optional |
| CFD. | Cu | | The maximum . | amount of hours an employee ca | n work in a given week. Example: 15 | |
| | _ | Punch ID | 7834 | | | 12.5 |
| | Me | | The number that Show addre | t this employee can punch in wit | 1 | 20 |
| | L | | Show addre | | | 20 |
| 8 8 | Staf | f | | Assign Color f | or Tables | • |
| H | Floo | rplan | | | Change Passcode (| 5858) |
| ļ | Bill & Chit | | | Force Clockout | t | |
| | | | | | View/Edit Shifts | S |
| _ | Payment Gateways | | | Manage QR Coo | 40 | |
| | Inter | mations | | | | |
| | integ | grations | | Assign | Default Table/Point of | Sale/Floorplan |
| ø° | Adva | anced | | | | |
| 0 | | | Staff Type | | Manager > | |
| B | Secu | unty | | | | |

For example, if Robin Lee in 7shifts has a **PunchID** of 7834, change Robin Lee's TouchBistro passcode to 7834.

Pro Speed Improvements

Pro (multi iPad) users will notice significant speed improvements. TouchBistro has dedicated significant effort to improve the performance of the system, users will notice an increase in speed when opening the restaurant, loading the floorplan, and most importantly when closing a table

Custom Staff Types

We are in the process of re-vamping how TouchBistro handles staff profiles and rights. For 6.1, we've eliminated the long list of "canned" profiles and offer, by default, a shorter list of standard front of the house and back of the house profiles.



Adding New Staff Types

| < Restaurant | | Staff |
|--------------|-------------------------|--|
| | | |
| 8 | TouchBistro | Edit Staff Types |
| Ē | Restaurant | Customize the roles which are assigned to all your staff |
| | Linneire | Edit Staff |
| H | Licensing | Create and manage staff records and assign roles |
| | Printers & KDS | |
| < | Customer Facing Display | |
| | Menu | |
| 8 | Staff | |
| 8 | Floorplan | |

You can create your own staff types by tapping **Edit Staff Types** and tapping the **Add** \blacksquare icon on the top right.

| < Restaurant | 🗸 Staff | Staff Types | + |
|-------------------------|-----------------|-------------|-------|
| | | | |
| TouchBistro | Bartender | | () > |
| Restaurant | Busser | | (i) > |
| Licensing | Chef | | (j) > |
| | Cook | | (j) > |
| Printers & KDS | Dishwasher | | (j) > |
| Customer Facing Display | General Manager | | (j > |
| Menu | Host | | (j) > |
| 3 Staff | Manager | | (i) > |
| | Staff | | (i) > |
| Floorplan | Waiter | | (j) > |
| | | | |

You can delete a staff type by swiping left.

| Name | Bartender Fast Bar | | |
|---|------------------------|--|--|
| | | | |
| Permission Level | Bartender > | | |
| Managers have the ability to authorize discou transfers, as well as performing the End of D Bartenders have access to bartender printers Staff only have access to the individual abilit | ay. s and Fast Bar. | | |
| Clock-In/Out Only | \bigcirc | | |
| Can Access Takeout | | | |
| Can Access Accounts | \bigcirc | | |
| Can Access Reservations | | | |
| Can Access Point of Sale | | | |
| Tap a staff type to edit its name, Permission Level , and security settings. | | | |

Edit Staff Type Select Permission Manager Staff Bartender ✓

The **Manager** permission level gives any staff member assigned to that staff type **Manager** functionality (closing a day, running reports, etc.).

The **Bartender** permission level will have their bill and end of day reports sent to any configured **Global Bartender Printer**.

Security Settings set here will be applied to any staff member given this staff type.

New Back of the House Security Setting

We've also added a **Is Back of House?** setting. If enabled, hours clocked by staff members assigned staff types with this enabled will have their hours reported as **Back of House Staff.** Previously this was determined by assigned the staff member a clock in only setting. 6.1 allows you to create staff members who have access to the floor plan but are flagged as **Back of House** staff for labor reporting purposes.

Setting Staff Types for Staff Members

The new **Edit Staff** option allows you to access your staff list, edit staff members, and assign staff types.

| < Restaurant | < Back | Edit Staff | Done/Save | | |
|------------------|------------------|--|--------------|--|--|
| | | | | | |
| Staff | | Change Passcode (583 | 3) | | |
| Floorplan | Force 0 | Clockout (1 day and 44 | minutes) | | |
| Bill & Chit | | View/Edit Shifts | | | |
| Payment Gateways | | Manage QR Code | | | |
| | Assign De | Assign Default Table/Point of Sale/Floorplan | | | |
| Integrations | | | | | |
| 6 Advanced | Staff Type | | Dishwasher > | | |
| G Security | PERMITTED | | | | |
| Cloud | Can Access Take | out | Yes | | |
| | Can Access Rese | ervations | Yes | | |
| Pro Server | Can Access Point | t of Sale | Yes | | |
| | Can Access Perse | onal Register | Yes | | |

If you tap **Staff Type**, you can assign staff types you created or edited. You can also edit the staff type settings before assigning the staff type.

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At the bottom of the staff member's details page, is a list of enabled (permitted) and disabled (not permitted) settings as set by the assigned staff type. You cannot change these individually.

If you want to change them, assign the staff member a new staff type or edit the staff type assigned. If you change settings to a staff type, all staff members assigned the staff type will have the updated security settings.

6.1 Updating Existing Staff Types

If you were using non staff/bartender/manager staff types from the previous TouchBistro (for example, Waiter, Cook, Door Greeter, Snack Counter, etc.) TouchBistro will automatically create staff types with those staff types/permission levels assigned in the previous version. The security settings assigned to the new staff type will be the same as the security settings assigned to the staffer given the staff types/permission level.

If more than one staff member was assigned the same staff types/permission level but had different security settings, (for example you had two Snack Counter staffers but one had **Can Access Accounts** enabled and one had **Can Access Accounts** disabled), 6.1 will create two similarly named staff types (e.g., Snack Counter 1, Snack Counter 2).

New Takeout Types

| | Printers & KDS | Cooking instructions, sides, etc. |
|---|-------------------------|---|
| | Customer Facing Display | Menu Items Caesar Salad, Filet Mignon, California Roll, etc. |
| | Menu | Discounts |
| 8 | Staff | Customize the list of present discounts that waiters or managers can choose from when discounting items. |
| 8 | Floorplan | Promotional Pricing |
| | Bill & Chit | Set up a schedule to change the pricing and availability of menu items throughout the day & week. |
| | Payment Gateways | Gratuity Settings |
| | Integrations | Setup and manage the gratuity that can be applied automatically to your bills/guest checks. |
| ø | Advanced | Takeout Types |
| f | Security | Greate custom takeout types that will appear on kitchen ohits and reports. |

Under the **Menu** settings page, we've added a **Takeout Types** option. If you need to send chits/tickets to the kitchen flagged for different kinds of takeout orders, you can create these here.

Tap the Add 🖶 icon on the top right. Enter the Takeout Type. Tap Save.



Setting new **Take Out Types** can be useful if your kitchen or expediting staff needs takeout specifics on the kitchen ticket to treat different kinds of take out differently. For example, you might create a "Drive Thru" take out type that alerts kitchen staff a drive through order needs to be packed differently or given some kind of priority.

Using Your New Take Out Types

| Me | | | | | | Admin |
|----|--------|--------------------|----------|--------------------------|-----------------|--------------|
| | | Choose Ord | ler Type | B1-4 B1-3 B1- | B1-1 | |
| | | Delivery | | | | Done |
| | + | Takeout | | out/delivery. \$32.75 | | |
| | Sort | Drive Thru | | | | |
| | All T | Online Order | | All Seated Tables | All Closed Bill | s |
| | Delive | ery | | | | |
| | | 27, 2015, 10:00 PM | | Unpaid | \$18.0 | 7 (1) |
| | Taked | out | | | | |
| | | 27, 2015, 5:53 PM | | Unpaid | \$14.6 | 8 (i) |

When you create a takeout via the **Orders** screen, you will be given a list of your optional takeout types.

Takeout Header

| < Restaurant | | Bill & Chit | | |
|--|-----|--|------|--|
| TouchBistro | | Current Order # 5879 | | |
| | | Chit Layout | Done | |
| TOP OF CHIT LAYOUT | | | | |
| Spacing from top | 1 > | ****** | | |
| Include takeout header Include sent time Include table name | | TAKEOUT | | |
| | | Sent: Aug 28, 2015, 9:58 PM Table: Table 5, 4 Top 2 Covers Waiter: Joe | | |
| | | Order: 1234 | | |

Under **Bill & Chit**, we've added **Include Takeout Header**, which gives you the ability to enable/disable a banner that prints for takeout and delivery order chits/tickets.





Sent: Aug 27, 2015, 4:19 PM Table: Takeout, 0 Top 1 Covers Waiter: Admin Course: Course 2 Order: 5874

If enabled, TouchBistro will print a TAKEOUT or DELIVERY banner across the top of the ticket.



If a custom takeout type was selected, the ticket will print the banner with the custom takeout type.

Star Kitchen Buzzer



TouchBistro has added support for the Star Kitchen Buzzer. The buzzer is a small device that plugs into your Star impact or thermal printer's cash drawer port. If you send a chit/ticket to the printer, the buzzer will make a loud beeping sound to alert kitchen staff a new chit/ticket has arrived. The buzzer can be useful in noisy kitchen situations where an impact printer is not loud enough or a counter server venue that may be using a thermal printer to print tickets and need the buzzer to alert food preparers about the arrival of a new ticket.



You also need to enable support on your Kitchen printer's setup page (Admin | Admin Settings | Printers & KDS)

Set Menu Items to Require Manager Approval



At the menu item level, you can now prevent a menu item from being added to an order unless there's a manager/admin passcode approval. Enable the new **Requires Manager Approval** setting. You can use this, for

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example, to prevent wait staff from adding a particularly expensive bottle of wine to a customer order.

Printing Zero Priced Items on the Bill



We've moved the options to print zero priced modifiers and menu items, as well as 100% discounted items, from **Advanced** to the **Bill/Guest Check Layout** screen (found under **Admin | Admin Settings | Bill & Chit**).

Modifiers

Custom Modifier Suffix

| < Restaurant | Advanced |
|------------------|--|
| | Print Void Chits When Items Are Voided |
| Bill & Chit | Print Chits to Bartender Printer When a bartender printer is set, the bartender's chits will print to it in addition to receipts |
| Payment Gateways | OTHER |
| Integrations | Enable Animations Disable this to remove most animations from TouchBistro. This may |
| 6 Advanced | Show Contact List when Entering Names Enable this to show a popup with all of your contacts when entering |
| G Security | names on orders. Enable Modifier Price Changes |
| Cloud | Disable this setting to remove the ability to change a modifier's price after it has been added to an item. |
| Pro Server | Custom Modifier Suffix Custom |
| | REGISTER BUTTONS |
| Exit Restaurant | Change Register Buttons Change the composition and order of the register buttons Credit on East Bar |
| | Enables Fast Bar Credit. |

Under **Advanced** settings **Other** section, you can now add a **Custom Modifier Suffix**. The text entered here will be appended to any custom modifier entered by a server,

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helping alert kitchen staff the modifier is a custom modifier.

Forced Modifiers Suppressed at Fast Bar

If a bartender is using the POS in Fast Bar mode, TouchBistro will not pop-up forced modifiers.

New Reports

Sales by Table

| Sales Accounting Menu Payments | Labor | CURRENT REPORT |
|--|-------|------------------------------------|
| Possible Reports | | Sales by Table |
| Sales Totals List sales, gratuity, tax, and gross totals | i | A sales report broken out by table |
| Daily Sales Report A summarized report of total sales separated by day. | i | |
| Sales by Section List total income by section | (i) | |
| Sales by Table A sales report broken out by table | (i) | |
| Sales by Category List total income by menu item category | i | |
| Detailed Takeout Report A list of the takeouts and their totals. | i | |
| Takeout Types Report Show a summary of all takeout types. | i | |
| Detailed Discount Report A detailed list of each discount | i | |

Under **Reports (Admin | Reports)**, we've added a new **Sales by Tables** report to the **Sales** section.

| Sales | by Table |
|------------------|--|
| B1-5 | |
| Count: 4 | Total: \$51.95 |
| B1-6 | T-+-1, #00, 07 |
| Count: 1 P104 | Total: \$23.97 |
| Count: 2 | Total: \$101.93 |
| T1-1 | |
| Count: 1 | Total: \$39.96 |
| T1-4 | |
| Count: 2 | Total: \$71.92 |
| T1-5 | T , 1 , 6 , 6 , 6 , 6 , 6 , 6 , 6 , 6 , 6 |
| Count: 3 | Total: \$122.92 |
| T1-9 | |
| Count: 1 | Total: \$17.97 |
| Totals | |
| Count: 14 | Amount: \$430.62 |

When generated, the report breaks down the pre-tax sales totals for each table name as well as the number of bills generated per table (the count figure).

If customers get separate checks at a table, count includes each separate check. So a table of four that pays one check would be a count of 1. A table of four that splits by seat and pays four separate checks would be a count of 4.



Takeout Type Report

| Sales Accounting Menu Payments | Labor | CURRENT REPORT |
|--|---------|--|
| Possible Reports | | Takeout Types Report |
| Sales Totals List sales, gratuity, tax, and gross totals | i | Show a summary of all takeout types. |
| Daily Sales Report A summarized report of total sales separated by day. | (j) | |
| Sales by Section List total income by section | (j) | |
| Sales by Table A sales report broken out by table | (j) | |
| Sales by Category List total income by menu item category | i | Sort By |
| Detailed Takeout Report A list of the takeouts and their totals. | (i) | Takeout Type (Current) |
| Takeout Types Report Show a summary of all takeout types. | (j) | Sales Total |
| Detailed Discount Report A detailed list of each discount | (j) | |
| Discounts Summary A summary of all discounts | i | Item Count |
| Void Report | \odot | |

Under the **Sales** section, we've also added a new **Takeout Type** report **Sales** section.

| Takeout Types Report | |
|-------------------------|---------------------|
| Bar Tab | |
| Orders: 1 | Total: \$30.97 |
| | Tax: \$4.03 |
| Delivery | Net Total: \$35.00 |
| Delivery Orders: 2 | Total: \$46.97 |
| | Tax: \$6.11 |
| | Net Total: \$53.08 |
| Drive Thru Orders: 4 | Total: \$144.89 |
| | Tax: \$18.84 |
| | Net Total: \$163.73 |
| Takeout Orders: 1 | Total: \$30.98 |
| | Tax: \$4.03 |
| | Net Total: \$35.01 |
| Total | |
| Sales | \$253.81 |
| Tax | \$33.01 |
| Net Total | \$286.82 |

The report will show pre- and post-tax totals for orders created as bar tabs, delivery, or takeout (breaking out any new custom takeout types you've created).

New Dialog Boxes for Promotions and Discounts

The **Menu** section's **Promotions** and **Discounts** dialog boxes have been replaced with slide-in panels similar to **Void Reasons**. Functionality remains the same although controls have been modified slightly.