One Blue Hill Plaza, 16th Floor, PO Box 1546
Pearl River, NY 10965
1-800-PC-AMERICA, 1-800-722-6374
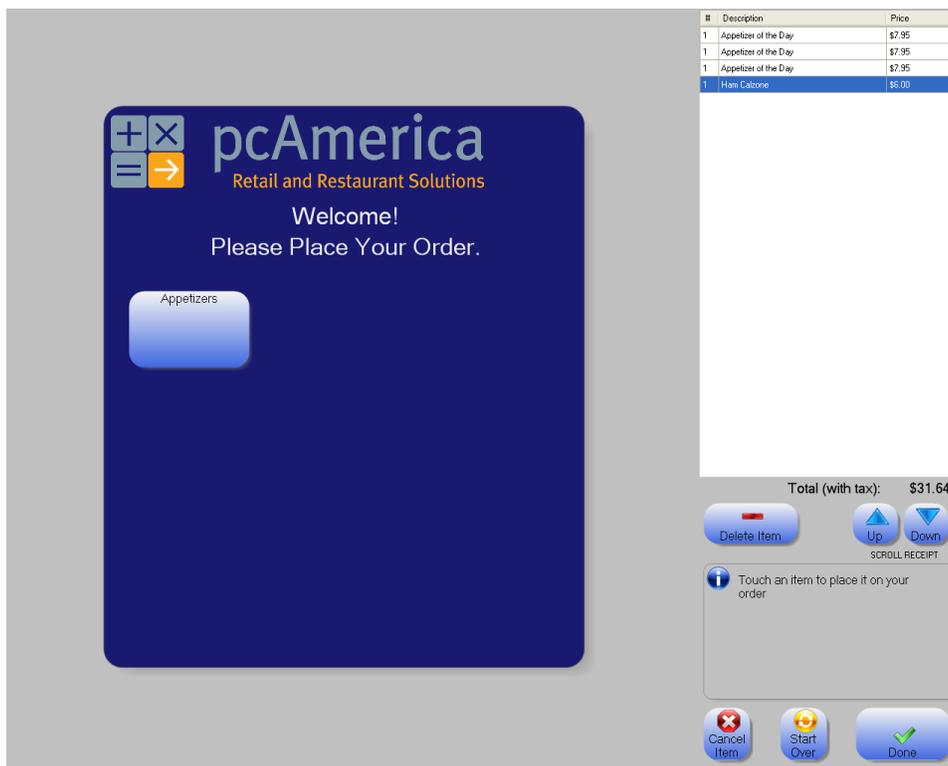(Voice) 845-920-0800 (Fax) 845-920-0880

Using the Self Service Feature

In your retail store or restaurant you may want to give customers the ability to place their order themselves at a kiosk or separate terminal. To enable and configure this feature please follow the directions in this document.

NOTE: As of version 12.8018 the following processors supporting EMV have been integrated into self-service, click on the links below to be redirected to the installation guide for each processor & the certified EMV pinpad:
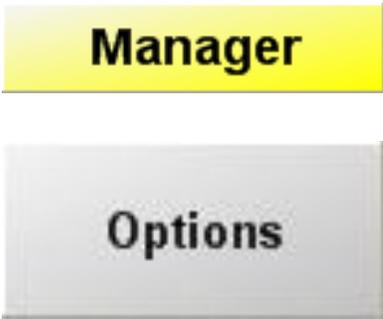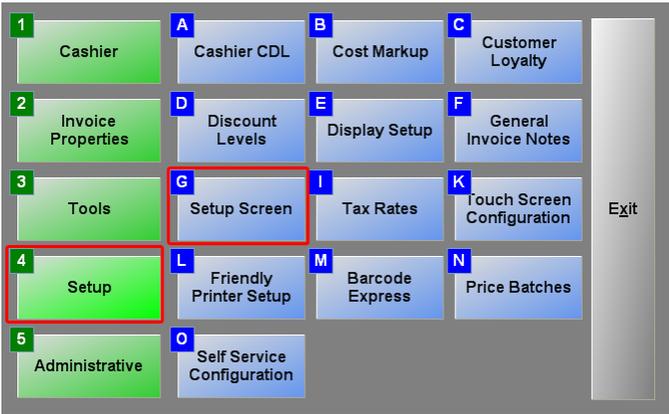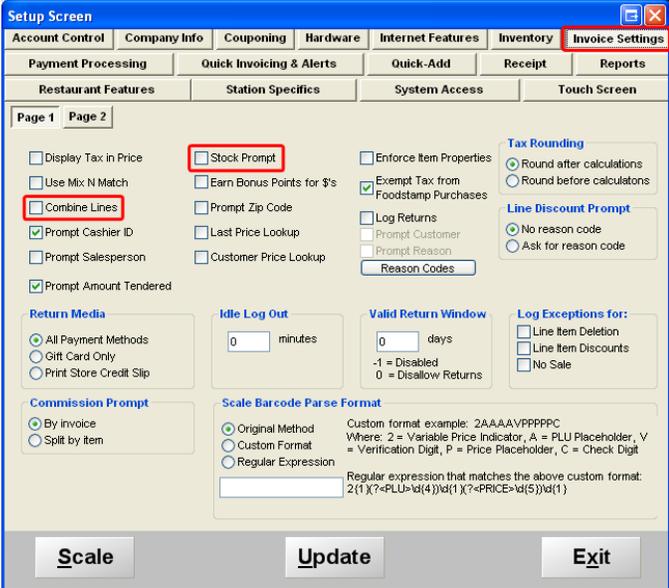
PAX S300 with Heartland Payments

VeriFone VX805 via Datacap with Mercury, Chase, Vantiv, First Data, and TSYS

TABLE OF CONTENTS

Configure CRE/RPE for Self Service - Options

Manager **Options**	1. Select the **Manager** or **Options** button. 2. Enter the administrator password (default: admin) where applicable.
Setup Screen menu with buttons: 1 Cashier, A Cashier CDL, B Cost Markup, C Customer Loyalty 2 Invoice Properties, D Discount Levels, E Display Setup, F General Invoice Notes 3 Tools, G Setup Screen, I Tax Rates, K Touch Screen Configuration, Exit 4 Setup, L Friendly Printer Setup, M Barcode Express, N Price Batches 5 Administrative, O Self Service Configuration	3. Select **Setup** and then **Setup Screen**. **Note**: you will want to avoid any options that prompt the cashier.
Setup Screen window — Invoice Settings tab, Page 1 with various checkboxes	4. Select the **Invoice Settings** tab. Make sure the following are unchecked: • **Stock Prompt** • **Combine Lines**

5. Select the **Restaurant Features** tab.

6. Under **On Hold ID** it is recommended that **Abbreviated (3 digits)** is selected.

7. Select the **Receipt** tab.

8. Under **Print Invoices** select **Yes**.

9. Check **Print Bar Codes On "On-Hold" Receipts**. This will help make checkout faster as the cashier accepting payment will only have to scan a barcode.

10. Select **Update**.

Note: To print barcodes please refer to your printers installation guide located at:

- http://faq.pcamerica.com

Creating an Employee

An employee must be created to track the self service transactions.

	1. Select the **Manager** or **Options** button. 2. Enter the administrator password (default: admin) where applicable. 3. Select **Administrative** then, **Employee Maintenance**. Only the administrator can access this screen.
	4. Select the **Add Employee** button to create a new employee record. Assign a unique Employee ID (e.g. **99**), password and a **Display Name** (e.g. **Self Service Orders**) that prints on the receipt. **Note**: If you would like to assign a secure login card to this employee, swipe the card in the **Card Swipe ID** box.
	5. For security purposes you will need to set the **Allow Exit** permission to **Prompt**. This will prompt for an administrator password if the customer tries to exit the invoice screen.
	6. Select the **Save Changes** button. Your employee has been added! Add any additional employees you wish to configure and then select **Exit**.
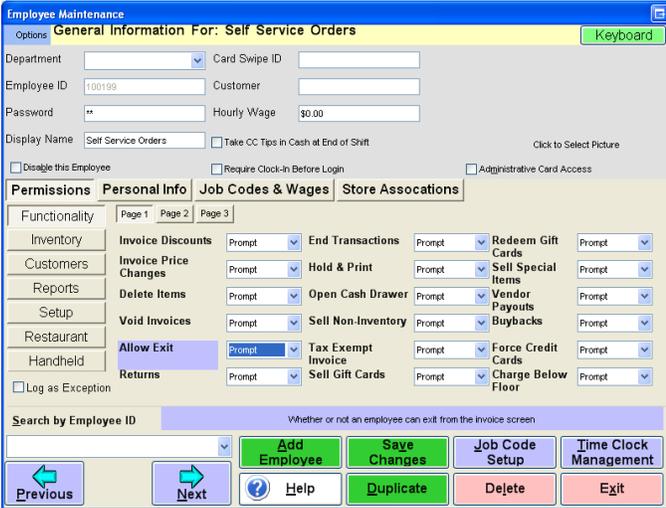
Enabling the Self Service Feature
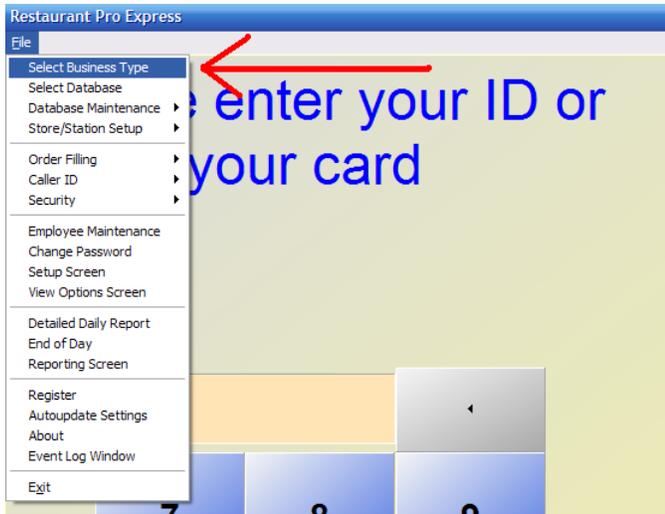
	1. Configure the station to use the self service Feature by going to the **File** menu and then select, **Select Business Type**.
	2. Choose either **Self Service – Restaurant** or **Self-Service – Retail** depending on your environment. **Note**: The choice between retail and restaurant has implications on credit card processing.
	3. Select **Manager** or **Options** (entering the required credentials when applicable). 4. Select **Setup** and then **Self Service Configuration**.
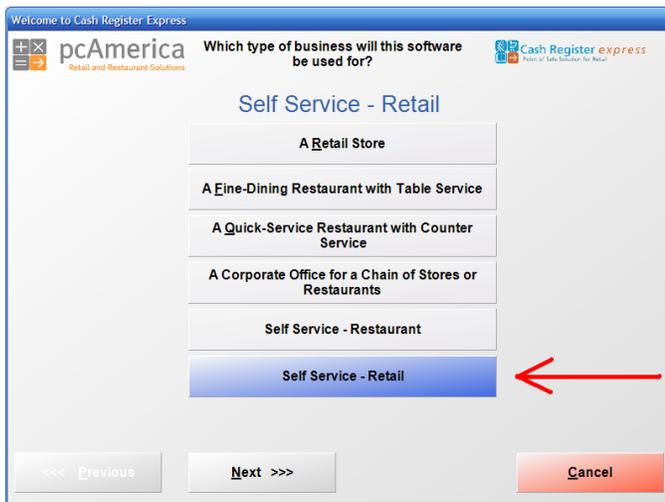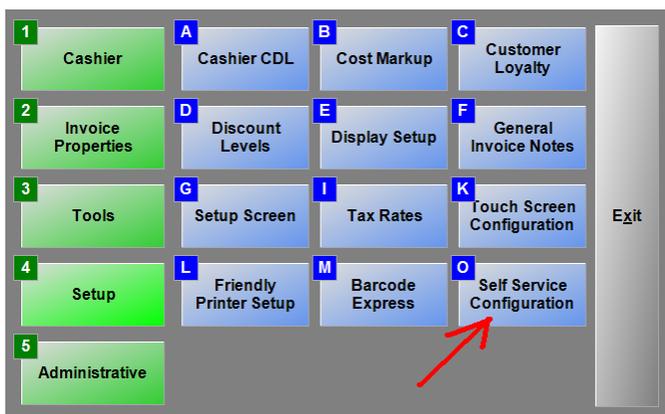
Self Service Configuration

When configuring the self service screens (the screens that the customer will see when placing their order), we must customize the following:

- **Main Screen Configuration** - This is the background screen for all of the panels. The main screen holds the important information pretaining to the invoice such as:
  - Invoice readout - This will show the customer everything that has been added to the order, as well as the total that they owe (with tax included).
  - Invoice Options - These options will allow customers to delete items off of the invoice as well as move them up and down on the invoice.
  - Order Options - These options will allow the customer to cancel the item currently being ordered, start the complete order over and complete the order.

- **Template Configuration** - Templates are a way to create a predefined layout, when new panels are created they will use the options you specified for the template. There are two types of templates that can be created:
 - **Template Configuration – Choice Template** - Choice templates are the templates used when creating new Choice Panels, where the customer will select the departments and items in the departments.
  - **Template Configuration – Modifier Template** - Modifier templates are templates used when creating new Modifier Panels.

- **Creating New Choice Panels** - Choice Panels are the main screens where the customer will select the departments and items in the departments.

- **Modifier Panels** - Modifier Panels are used if an item selected from a choice panel has modifiers or modifier groups attached to it.
  - **Modifier Panels – Custom** - Custom modifier panels display up to 6 uniform buttons per page. A change to one button's properties will change all of the buttons on the page.
  - **Modifier Panels – Simple** - Simple modifier panels display up to 20 uniform buttons per page. A change to one button's properties will change all of the buttons on the page.

Main Screen Configuration
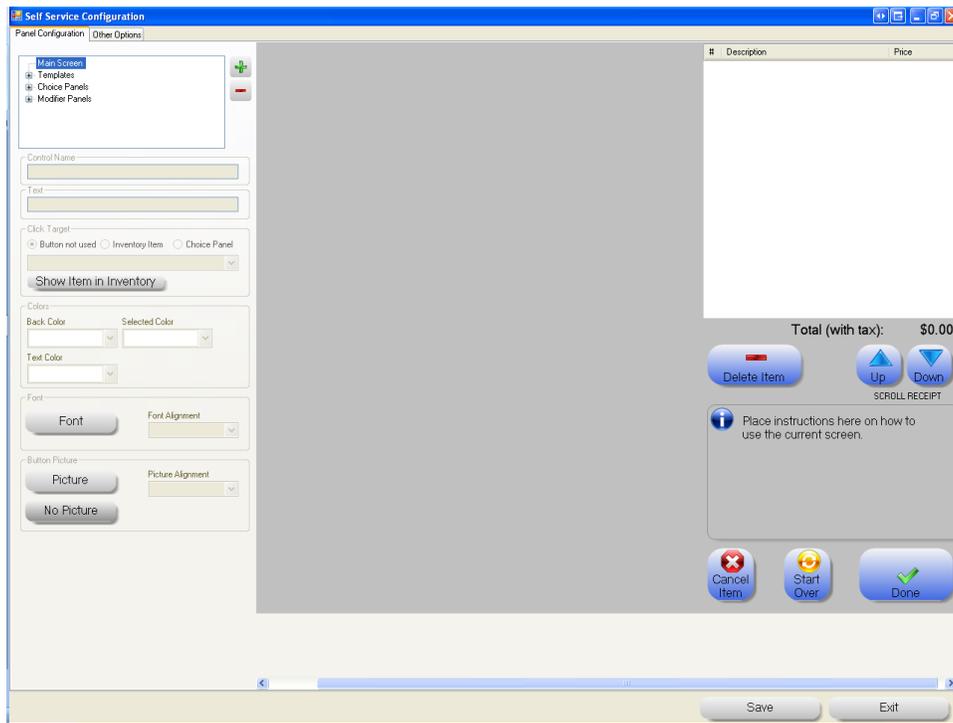
1. Select **Main Screen** under **Panel Configuration**.

Note: The following is editable on the **Main Screen**:
   - **All buttons** (including, images, color, and caption)
   - **Totals labels**
   - **"Info icon"**
   - **Background color**

2. To edit a section, double-click an empty area of the section (i.e. background). Depending on what kind of control you clicked, and what type of panel you are editing, the editable options vary. The options that are not valid will be disabled and you will be unable to edit them.
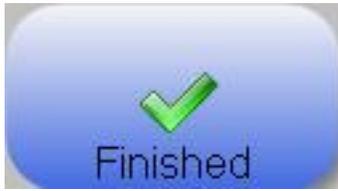
3. To edit a particular button or caption, select the control (button) then use the options on the left side to edit it. The options that are not valid will be disabled and you will be unable to edit them.
4. Select **Save** when finished.

The following are the buttons maximum pixel dimensions, if you will be using images in place of buttons:

- o The **Delete** button – 125x54 pixels.
- o The **Up** and **Down** buttons – 60x60 pixels.
- o The **Done** button – 127x71 pixels.
- o The **Information** button – 32x32 pixels.
- o The **Cancel Item** and **Start Over** buttons – 63x71 pixels.
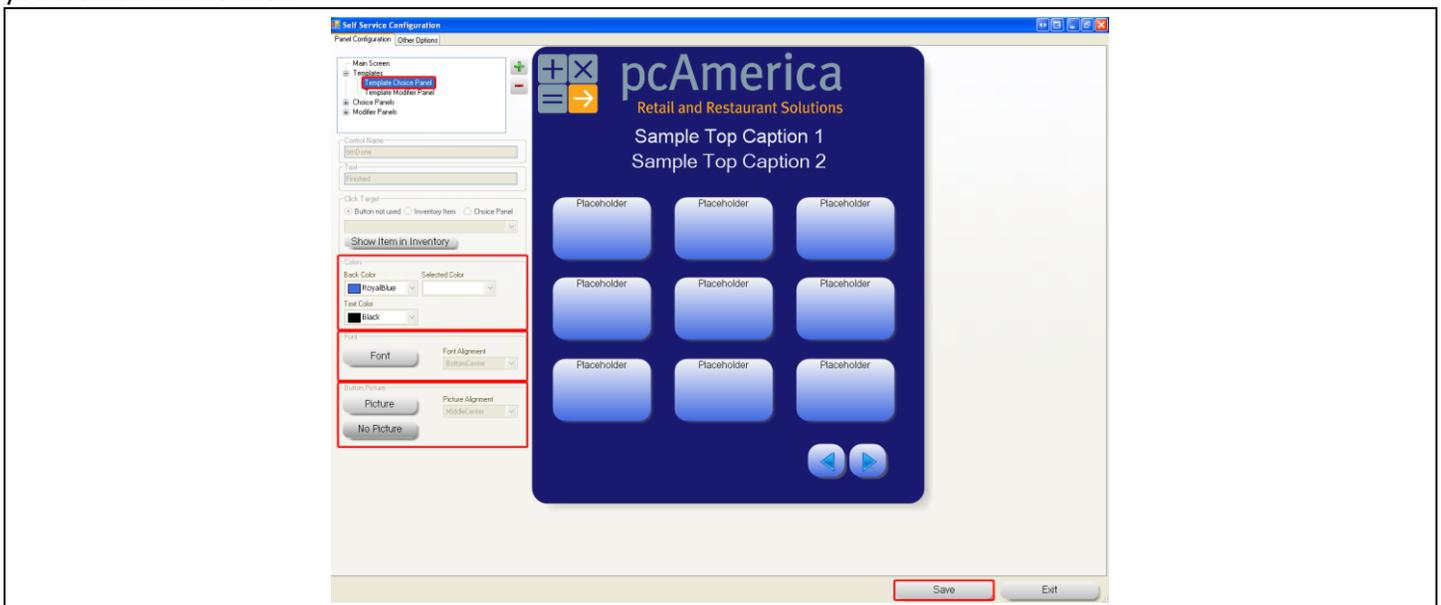
Template Configuration

Templates can be edited to set default fnts, sizes and alignments, text, button and background colors and/or pictures. There are two types of templates that can be created:

- **Choice Template** - Choice templates are the templates used when creating new Choice Panels, where the customer will select the departments and items in the departments.
- **Modifier Template** - Modifier templates are templates used when creating new Modifier Panels.

When you add a new Choice panel or Modifier panel, these defaults that you created will be used.

Template Configuration – Choice Template

There are 2 types of templates: Choice and Modifier. The Choice template can be edited to set default fonts, sizes and alignments, text, button and background colors and/or pictures. When you add a new Choice panel, these defaults that you created will be used.
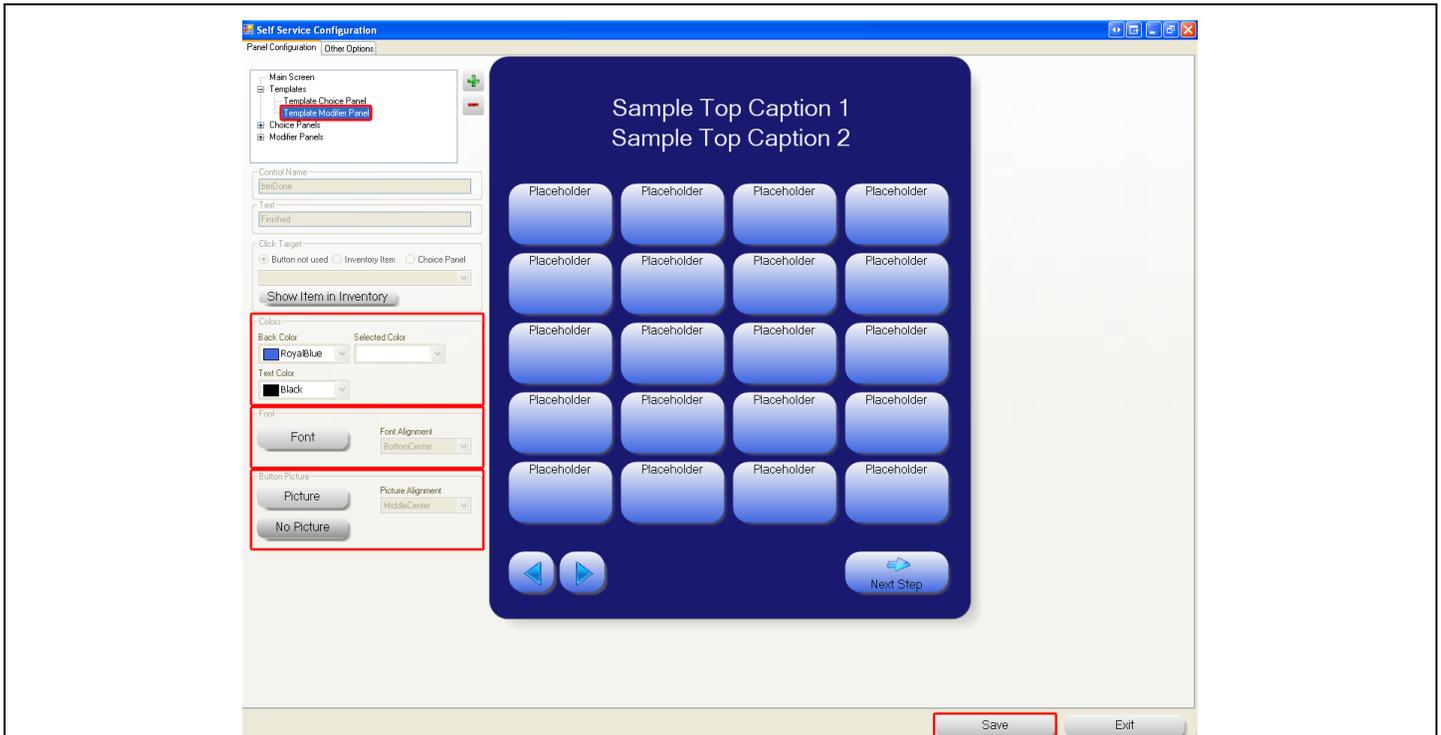

1. Select **Templates** then **Template Choice Panel** under **Panel Configuration**.

Note: The following is editable on the **Template Choice Panel**:
   - **All buttons** (including images, font, color, and caption)
   - **Font**
   - **Logo**
   - **Background color**

2. To edit a button simply select the button in question and use the options on the left to edit it. The edits for the buttons include changing the buttons color, the font of the text and, adding a picture of your item.

The following are the buttons maximum pixel dimensions, if you will be using images in place of buttons:
   - The **Placeholder** buttons – 162x102 pixels.
   - The **Left** and **Right** buttons – 60x60 pixels.

3. To edit the background color, or the logo, simply select an area of the background and, use the controls on the left, to make any changes.

4. To edit the Top Caption 1, simply select the text. Using the controls on the left, make any changes.

5. Select **Save**.

Template Configuration – Modifier Template

When an item has a modifier group attached to it, the program will automatically create a "Simple" Modifier screen based on the template you have setup. You can override this behavior on a per group, per item basis by adding a modifier panel manually.

6. Select **Templates** then **Template Modifier Panel** under **Panel Configuration**.
Note: The following is editable on the **Template Modifier Panel**:
   o **All buttons** (including images, font, color, and caption)
   o **Font**
   o **Background color**

7. To edit a button simply select the button in question and use the options on the left to edit it. The edits for the buttons include changing the buttons color, the font of the text and, adding a picture of your item.

The following are the buttons maximum pixel dimensions, if you will be using images in place of buttons:
   o The **Placeholder** buttons – 162x102 pixels.
   o The **Left** and **Right** buttons – 60x60 pixels.
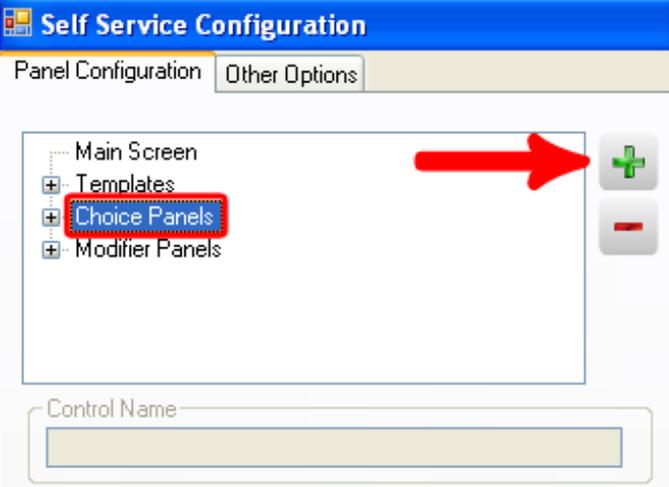   o The **Next Step** button – 140x60 pixels.
8. To edit the background color, simply select an area of the background. Using the controls on the left, make any changes.
9. To edit the Top Caption 1, simply select the text. Using the controls on the left, make any changes.
10. Select **Save**.

Creating New Choice Panels

Choice panels are the main type of panel, and at least 1 must be created in order to get a working self service screen. In our example we will be creating a Main Choice Panel (which will be the first panel that your customer views) and then a sub page containing items.

	1. To create a new panel, select the node you'd like to add a panel to (**Choice Panels**), and select the green plus icon next to the tree. 2. This will create a new blank panel, based on the template, with a name that says **Not Set**. Click on the panel's background and change the **Control Name** to give it a friendlier name (i.e. **Main**). We will then want to create another **Choice Panel** and name it **Appetizer**. **Note:** Remove a panel by selecting it in the list and selecting the minus button. **Note**: You can create an unlimited number of choice panels and link them however you'd like.
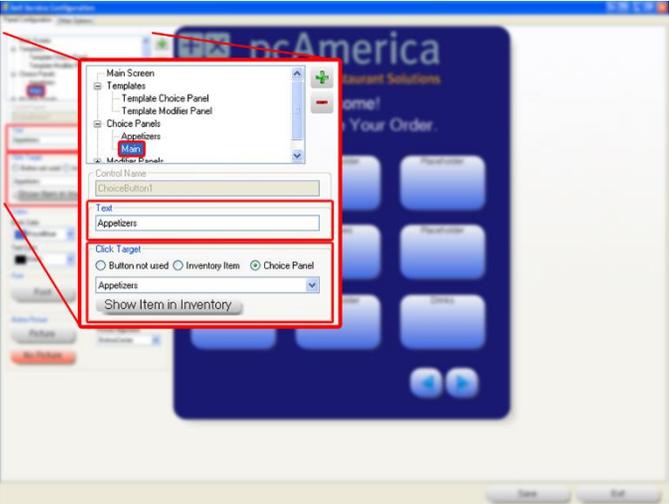
	3. Choice panels have buttons that have 2 different functions:
	   • **Inventory Item** – Choose the item from the dropdown that you wish to sell when the button is pressed.
	   • **Choice panel** – Select the panel from the dropdown you want to display when the button is pressed.
	Note: Any buttons whose Click Target is **Button not used**, will not be displayed to the customer. If there are not enough items for more than 1 page, the next and previous buttons will be hidden as well.
	4. Select a button from the **Choice Panel** "Main" we created in step 2, and then change the **Text** to **Appetizer**. We will then change the **Click Target** to **Choice Panel**. We will then use the dropdown to select the **Choice Panel** that we created (**Appetizer**).
	5. To change the **Sample Top Captions**, select the text and enter something on the left under the **Text** field (e.g. Welcome!).

Note: If adding Inventory items that have modifiers or modifier groups attached to them, the Modifier Panel Template will be used by default. However, each Modifier/Modifier Group Panel can be customized per item.
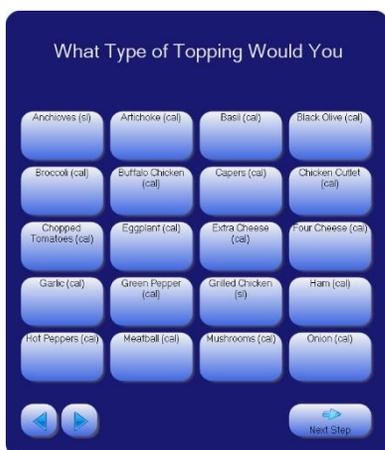
Modifier Panels
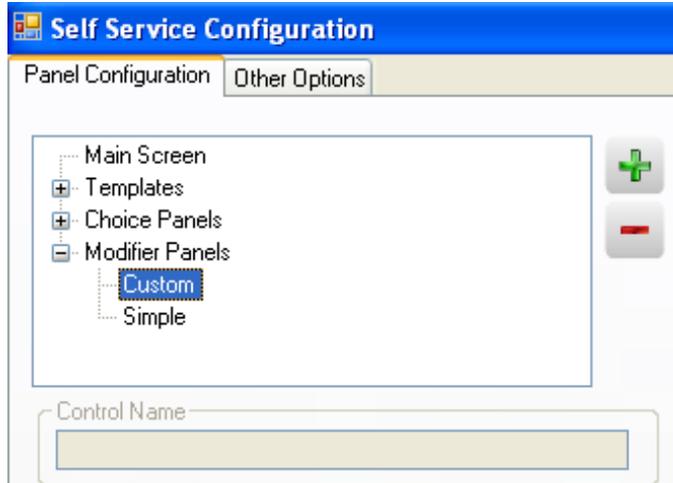
1. When adding new Modifier Panels there are two choices of panels to create:
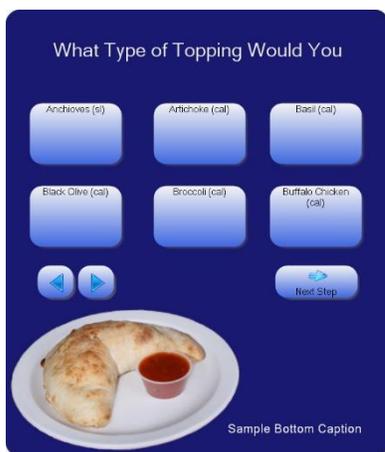
- **Custom**
  - Custom modifier panels display up to 6 uniform buttons per page. A change to one button's properties will change all of the buttons on the page.
  - Custom modifier panels have a picture available at the bottom left of the page.
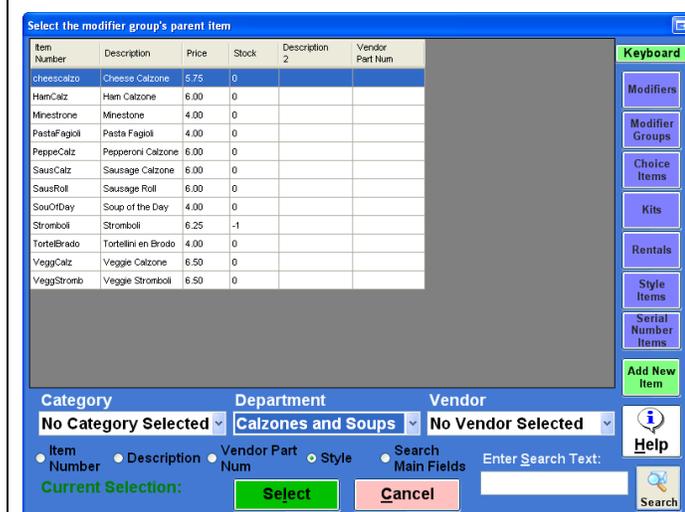

- **Simple**
  - Simple modifier panels display up to 20 uniform buttons per page. A change to one button's properties will change all of the buttons on the page.
  - Simple modifier panels do not use pictures.

Modifier Panels – Custom
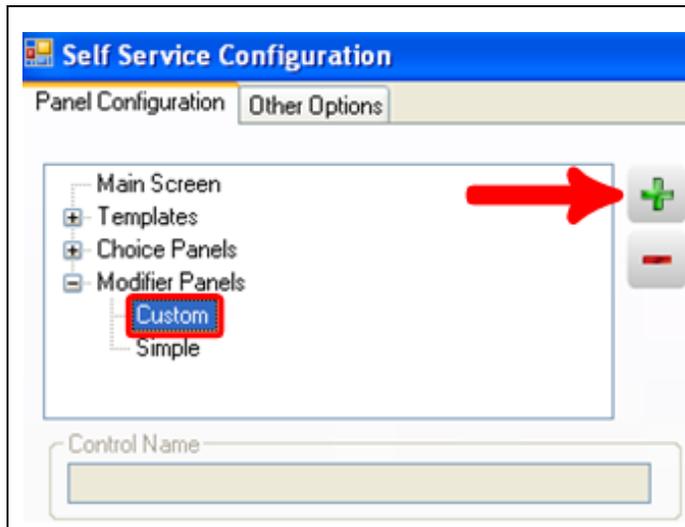
1. To add a new **Custom Modifier Panel**, highlight **Custom** under **Modifier Panels** and select the green plus icon next to the tree.

2. When you choose to add a new modifier panel, you will first be asked to select the parent item (item to be modified), followed by which modifier group to add.
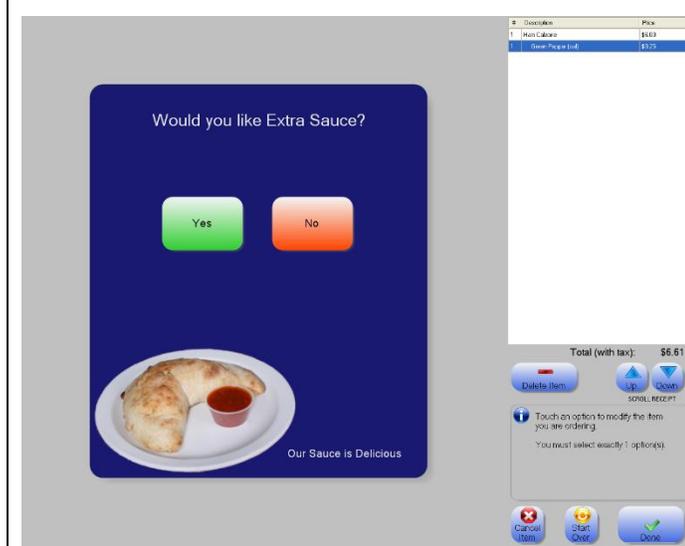
Note: Any modifier groups that have a single item in them are converted into a yes/no question. You are able to modify the yes/no buttons.
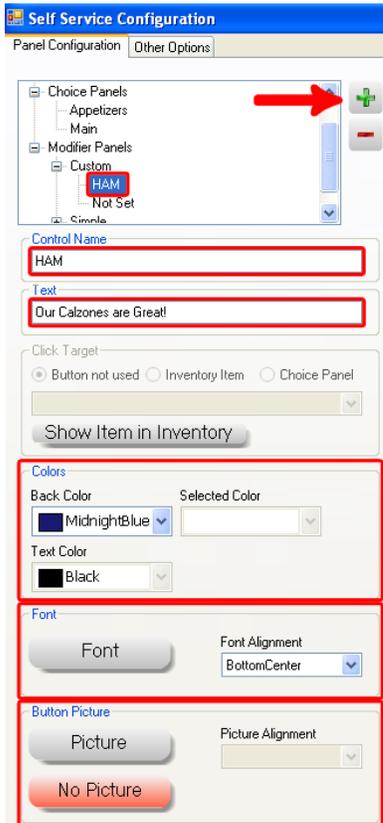
3. After adding the **Modifier Panel** you can configure it using the controls on the left.

4. When selecting the background you will be able to; change the **Control Name** (recommended for organization), add an image (custom panel only) under button picture, and change the background color under Colors.

5. To edit any text on this screen, select the text in question you will then be able to edit the **Font** and **Colors**.

6. To edit the buttons, select one and you will be able to edit the color and font. Any change made to a modifier button will change all of the modifier buttons.

Note: You will be able to edit the Previous, next, and next step buttons separately. You will also have the ability to add a picture to any of them by selecting one and then specifying a picture under **Button Picture**.

After adding the Modifier Panel (Ham Calzone Toppings) and configuring it how you want it, you will need to add the parent item (Ham Calzone) to one of your choice panels.

Modifier Panels – Simple

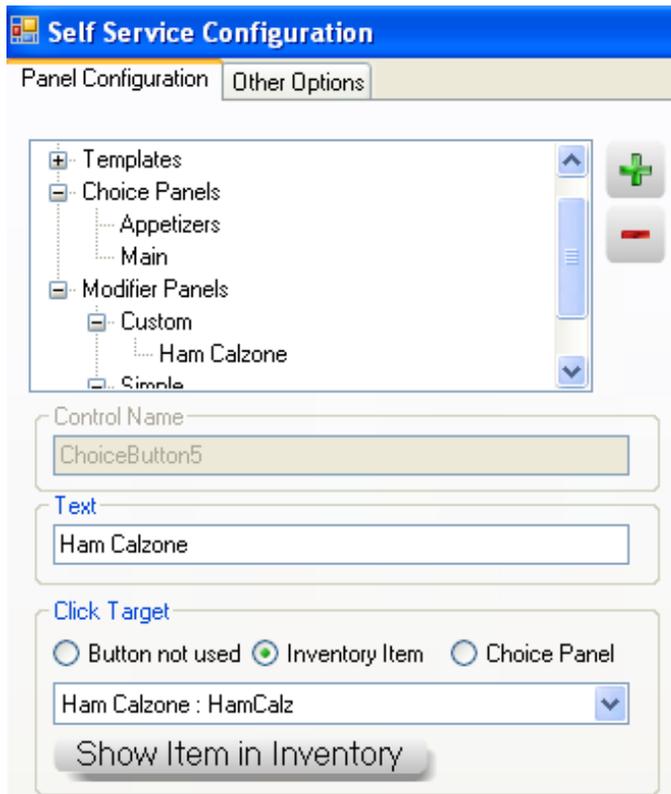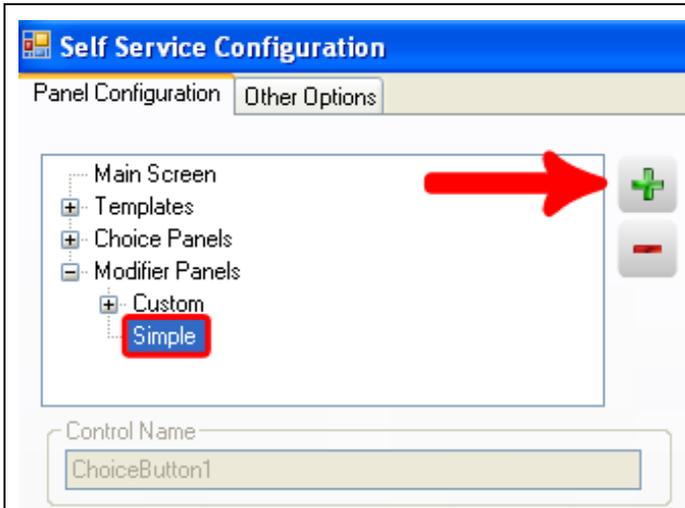|	
	1. To add a new **Custom Modifier Panel**, highlight **Simple** under **Modifier Panels** and select the green plus icon next to the tree.
	2. When you choose to add a new modifier panel, you will first be asked to select the parent item (item to be modified), followed by which modifier group to add.

3. After adding the **Modifier Panel** you can configure it using the controls on the left.

4. When selecting the background you will be able to change the **Control Name** (recommended for organization), and change the background color under Colors.

5. To edit any text on this screen, select the text in question you will then be able to edit the **Font** and **Colors**.

6. To edit the buttons, select one and you will be able to edit the color and font. Any change made to a modifier button will change all of the modifier buttons.

Note: You will be able to edit the Previous, next, and next step buttons separately. You will also have the ability to add a picture to any of them by selecting one and then specifying a picture under **Button Picture**.
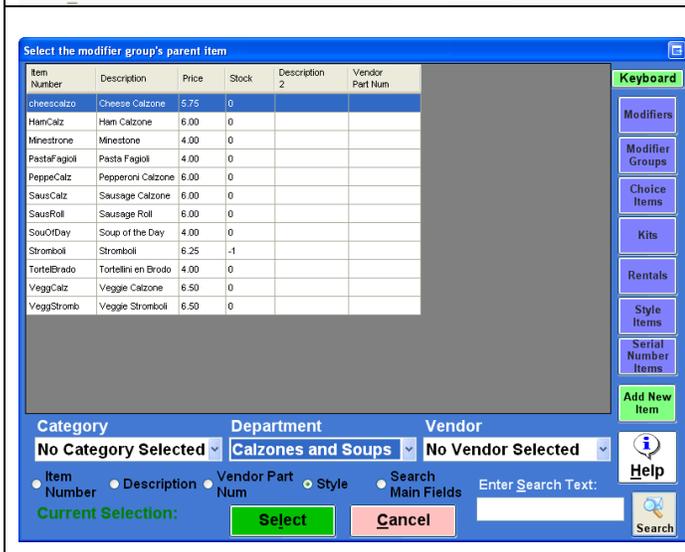

After adding the Modifier Panel (Ham Calzone Toppings) and configuring it how you want it, you will need to add the parent item (Ham Calzone) to one of your choice panels.

Other Options tab
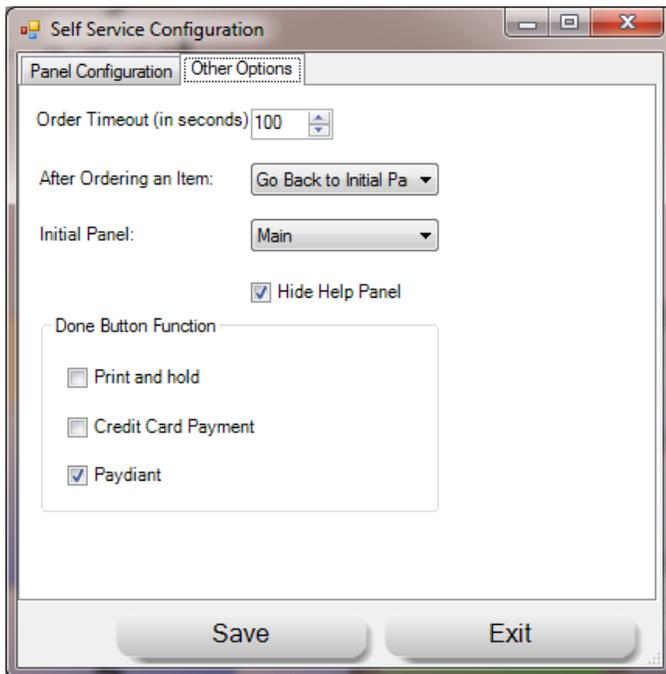
1. For **Order timeout** set an amount of time (in seconds) that the screen will reset due to inactivity. If the customer doesn't touch any buttons or screen at all, when 15 seconds are remaining in the countdown, they will be presented with a question asking if they would like to cancel their order. If they choose to continue, the timer will reset.
2. For **After Ordering an Item** there are two options, go back to initial panel (default), or ask if the customer wants to order another item. If **Ask for More Items** is set and they choose to not order another item, the **Done** button is pressed automatically.
3. Set the **Initial panel** to the choice panel you would like the customer to see by default.
4. Check **Hide Help Panel** to hide the help panel from the customers.
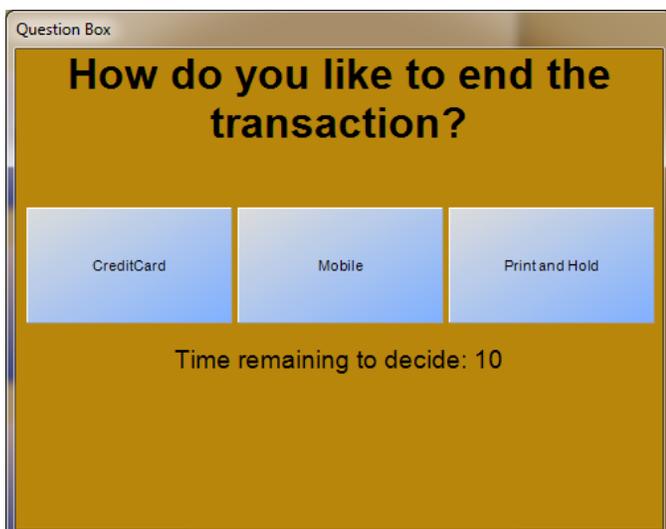5. For **Done Button Function** select the options you would like to give the customer to end the transaction (see: **Step 7**).

**NOTE: As of version 12.8018 the following processors supporting EMV have been integrated into self-service, click on the links below to be redirected to the installation guide for each processor & the certified EMV pinpad:

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6. Once you are done editing your panels, select the **Save** button to save your changes, and then select **Exit**.

7. When **Done** is selected on the invoice screen (by the customer) CRE/RPE will ask the customer how to end the order. The options available will be the options you enabled under the **Done Button Function** section in the **Other Options** tab of the **Self Service Configuration** screen.

Please use pinpad to finish Grand Total: $1.03 Amount Remaining: $1.03 **Failed Transaction Message** **Please use pinpad to finish** Grand Total: $1.03 Amount Remaining: $1.03 The credit payment could not be processed: Cancel	8. **Pay by credit card** (CreditCard) – the application will prompt the customer "Please use pin pad to finish". At this point the configured pin pad will prompt the user to swipe their card. ****NOTE: As of version 12.8018 the following processors supporting EMV have been integrated into self-service, click on the links below to be redirected to the installation guide for each processor & the certified EMV pinpad:** **PAX S300 with Heartland Payments** **VeriFone VX805 via Datacap with Mercury, Chase, Vantiv, First Data, and TSYS** 9. **Note:** If the transaction fails to be processed by the pinpad they will receive the prompt "The Credit payment could not be processed:" The customer must select cancel and press **Done** on the invoice screen to try again.
On Screen QR code pcAmerica Retail and Restaurant Solutions Place Order Below Consult Cashier For Assistance Please scan the QR Code to pay with Mobile Total Amount: $7.18 Cancel Print Total (with tax) $7.18	10. **Pay by Paydiant (Mobile)** – the application will generate a QR code to be scanned by a smartphone using the Paydiant application (for more information please see the document titled Paydiant Processing Configuration and Usage in CRE and RPE. 11. **Print and Hold the Transaction** - the order will print and then be put on hold waiting for payment.

Implementation

To verify that all is set up correctly, log into the **Self Service** screen using the employee that we created earlier (99), select **Appetizer** menu button on Main screen then select item. If item prompts for modifiers and there is more than one level of modifiers to choose from, select **Next Step** to get to the next level of modifiers.

Note: To exit the Self Service screen, quadruple-click the item grid (click the invoice area four times, very quickly).