

User Guide for Restaurants



Technical Support: 800-966-5520 – Option 3 Exatouch® Online Knowledge Base: help.exatouch.com



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Introduction

The Exatouch Point of Sale (POS) system allows users to process sales, track inventory, manage employees, and perform other essential functions.

This document is intended to be a Quick Reference Guide, and does not incorporate all capabilities and features available in the Exatouch POS system. Hyperlinked topics within this document will take you to the Exatouch Knowledge Base for more information.

Getting Started

Home Screen

Clickable modules on the Home screen provide access to Exatouch features. Identify your location in Exatouch by viewing the description on the bottom left of your screen. Your Home screen is labeled **HOME**.



Navigate to the Home screen by tapping the Home icon at the bottom of most Exatouch screens.



Exatouch Navigation Bar

The navigation bar is located by default along the bottom of most Exatouch screens. Within the navigation bar are clickable images that function like buttons.



Name	lcons	Function
Global Menu	• • • • • •	Displays the Options menu, which includes Machine ID, version number, and log in/log off functions
Home	E>	Returns user to the Home screen
Local Menu		Select to access the following functions: Delivery Manager, Bank Manager, Bank Swap, Age Check, Close Batch, Open Drawer, Refund, or Reprint
Lock		Select to access the Lock screen. Clicking the Lock icon also accesses the following features: Fresh Sheet, Check Gift Card Balance, Remote Support, Shift Report, Snapshot by Station, and Snapshot
Previous	\bigotimes	Returns user to the previous screen
Register	ß	Returns user to the Register from any other screen

Navigation bar icons perform various functions, which are defined in the following table:



Clocking In and Out

Exatouch lets users assign a unique, four-digit personal identification number (PIN) to every employee. Employees use PINs or swipe an employee ID card to clock in and out during shift changes or when taking breaks. PINs are set to 1111 by default and can be changed if desired.

Fresh Sheet	Shift Report		***			
Check Gift	Snapshot By Station		Clock In	7	8	9
Card Balance Remote	Snapshot	Enter PIN Or Swipe Access Card	Clock Out	4	5	6
Support Station Name:	Shapshot	Swipe Access Card	Start Break	1	2	3
EPI - TW - Pizza	nnical Support (800) 966-5520 - Option 3		End Break		D	\boxtimes

Clocking In to Start a Shift

- 1. From the Lock screen, tap **Clock In**.
- 2. Enter your PIN or swipe your employee ID card.
- 3. Tap Close to confirm.

Clocking Out to End a Shift

- 1. From the Lock screen, tap **Clock Out**.
- 2. Enter your PIN or swipe your employee ID card.
- 3. If declaring cash tips, enter an amount in the **Declare tips** field and tap **OK**.

Cancel			ок
	Clear	0	
	4	2	3
	4	5	6
Declare tips:	7	8	9

4. Tap Close.



Clocking Out for a Break

- 1. From the Lock screen, tap **Start Break**.
- 2. Enter your PIN or swipe your employee ID.
- 3. Tap Close.

Clocking In from a Break

- 1. From the Lock screen, tap **End Break**.
- 2. Enter your PIN or swipe your employee ID.
- 3. Tap Close.

Navigating the Register

Register View

Register View displays by default when you begin operating your Exatouch system.

In **Register View**, items are organized in Categories and Subcategories and display in columns in the middle of the screen. Users can create new orders, edit existing orders, process payments, and perform other functions within the Register view.

Navigate to **Register** app by clicking or tapping the **Register** icon at the bottom of most Exatouch screens. The register configurations in this guide may differ from your customized Exatouch system.



Dine In	Take Out Pick Up	Delivery	Delivery Service	Beverage	s	Slice					Floor Plan
	·			Appetizer	rs	Personal					Register
				Salads		Small					Order Details
				Pizza		Medium					Pay
				Sandwic	h	Large					Save Order
						Specialty					Get Order
					Slic	e and Whole					Print Order
Order #	4.										Print Remote
	Fi Ticket Label										Find Items
	Item Count: Subtotal: Discount:		0.00 0.00 0.00								Misc. Sale
	Tax: Tip: Other:		0.00 0.00 0.00								Open Item Taxable
	Total:		0.00								Open Item Non
	Paid:		0.00	Course	Fire	Apply Group Tip	Reassign	Take		Complete	Taxable
Cas	Balance Due: h Credit	: .	0.00 Debit	Seats Repeat Line	Remove	_	Discount	Info	Refresh Promo	Auth	Clear All
	REGISTER Logged In: EPI Adm	in			\bigcirc	 命 @			03:25: Fri. Apr.) =

Simple Mode

Simple Mode (also Quick Service Mode) removes the Category and Subcategory groupings, allowing users to quickly take orders. Selecting Simple Mode as the default is ideal for restaurants with smaller, simpler menus. System Administrator permissions are required to set default screen modes.

Dine In	Take Out	Pick Up	Delivery	Delivery Service	Seasoned F	ries	Waff	le Fries	Blackberry Cobbler Trifle	Butterm	ilk Pie	Caro	olina Pecan Cake	Floor Plan
					Carrot Ca	ke	Сосс	onut Pie	Devils Delight Cake	Drunken Cal		Lemo	on Crème Ice Cream	Register
					Lemon Po	und	Lemo	nade Pie	Peach Sorbet	Pecan	Pie	Pu	mpkin Pie	Order Details
					Tomato P	ie	Curl	y Fries	Steak Fries	Sweet F Frie			American Burger	Pay
					Bacon Chee Burger			Cheddar no Burger	Bacon Egg & Cheese Burger	Hall Of Bacon E		Kie	d's Burger	Send Order
					Mac N Che Burger		Maç Chee	jnolias seburger	O'Shea's Burger	Pimento & Bacon			om N Swiss Burger	Get Order
					Tarheel Bu	rger	Triple	B Burger	Western Burger	Boiled F Humr		Coo	quina Crab Dip	Print Order
Order #	4.				Crab Bisq	ue	Devil	ed Eggs	Down South Eg Roll	East C Oyst		Frie	ed Oysters	Print Remote
	F: Ticket Label				Little Neck C	lams	Shrim	p Bisque	Shrimp Cocktai	West C Oyst		Bud	Light Draft	Find Items
		count: btotal: count:		0.00 0.00 0.00	Budweiser pack	12	But Lig	ht Pitcher	Coffee	Col	æ	Co	ke - single BTL	Misc. Sale
	(Tax: Tip: Other:		0.00 0.00 0.00	Diet Cok	e	Diet C	oke 20 oz	Draft Beer	Elysian Dust		E	spresso	Open Item Taxable
	То	otal:		0.00	Course Seats		Fire	Apply Group Ti	p Reassign	Take	M el	gift	Complete Auth	Open Item Non Taxable
	Balance I	Paid: Due:		0.00 0.00	Repeat Line		move ₋ine	Split By Item	Discount		Refre Pro		Mods	Clear
Cas	h	Credit	Tal	o Auth							Aloha E	Burger		All
	REGISTI Logged In:					\bigcirc	ر با	1 4	<u>ه</u>				18 PM	} ≡



Placing Orders

Restaurants can choose an order type at the **Register**. By default, the Order Type buttons display on the top left corner of the **Register**.



Dine In Orders

Select **Dine In** for customers who order, eat, and pay at the restaurant. Although customer information is not required for **Dine In** orders, customers can be assigned to an order for tracking purposes.

NOTE: Dine In is the default setting for most Restaurant orders unless changed by the user.



- 1. Ring up items from the menu.
- 2. Tap **Save Order/Send Order** to send a **Dine In** order via a simple receipt to the remote kitchen printer

or display.



Take Out Orders

Select **Take Out** for in-restaurant customers placing an order to be packaged and brought home.



- 1. Navigate to the **Register**.
- 2. Select Take Out.
- 3. After selecting Take Out, staff can begin entering menu items.
- 4. Tap Save Order/Send Order. A receipt marked Take Out Order is sent to the remote kitchen printer

or display so staff can package the order accordingly.

Pick Up Orders

Select **Pick Up** when a customer places an order remotely and wishes to pick up the order at the restaurant. Unlike Take Out orders, Pick Up orders require a customer name and phone number.



- 1. Tap **Pick Up** for Pick Up orders. A Customer Phone Number pop-up displays.
- 2. For new customers:
 - a. Enter a telephone number.
 - b. Click Add Customer.



		ner Phone N <mark>5-555-55</mark>			
	1	2	3		
	4	5	6		
	7	8	9		
	Clear	0	Æ		
Cancel	Add Custom	er	Search	ОК	

c. Complete the customer information fields as needed and tap Save.

Delivery Service	Phone:	Email:				
	555 555-5555	SampleEmail@gmail.com				
	First Name:	Delivery Instructions:				
	Thomas	House is located in a cul de sac with a large live oak in the front				
	Last Name:	yard. Blue Volvo and red pickup in driveway.				
	Smith					
	Address:	v				
	111 Magnolia Lane	Delivery Address:				
		111 Magnolia Lane Aiken SC 29801				
Order #:	City:					
Order #:	Aiken					
	State: Zip:					
With Without Customer Customer	SC ~ 29801 ~	Search Manage Address Cancel Save				

- d. Proceed with the customer's order.
- 3. For existing customers:
 - a. Click Search. A list of saved customers displays.



		ner Phone N <mark>5-555-55</mark>		
	1	2	3	
	4	5	6	
	7	8	9	
	Clear	0	Æ	
Cancel	Add Custom	er	Search	ОК

- b. Select a saved customer and tap OK.
- c. Proceed with the order.
- 4. Process payment over the phone when manually entering card sales or when the customer presents payment at the time of pick up.

Delivery Orders

Select **Delivery** when a customer places an order remotely and wishes to have the order delivered by the restaurant (if available). Delivery orders require a customer name. phone number, and valid address.



- 1. Navigate to the **Register**, then tap **Delivery**.
- 2. Enter the customer's phone number in the pop-up that displays.
- 3. Search for a saved customer or add a new customer, if necessary.
- 4. Proceed with the order.
- 5. When a Delivery order is saved, a receipt marked Delivery is sent to the remote kitchen printer or

display and a receipt with the address is printed for the driver.



DeliverMe

Exatouch supports integration with DeliverMe, an online ordering feature designed specifically for Exatouch. Visit the <u>DeliverMe</u> section of the Exatouch Knowledge Base for more information.

Delivery Manager

Delivery Manager will show all in-house and third party orders, as well as DeliverMe orders. Order statuses and delivery service information display on the Delivery Manager screen. Visit the <u>Delivery Manager: 3rd</u> <u>Party Delivery</u> section of the Exatouch Knowledge Base for more information.

Place an Order from the Register

The following steps will help you place an order from your register.

- 1. Navigate to the **Register**.
- 2. Choose Order Type from the following options: Dine In, Take Out, Pick Up, or Delivery.
- 3. Select one or multiple items from the menu. Order items display as they are selected.
- 4. Optional: Apply a discount by selecting an item and tapping Discount.

Dine In Take C	ut Pick Up	Delivery	Delivery Service	Beverages	Slice	Bread Sticks	Budweiser	House Blush	Floor Pla
1 Alfred	o Fettuccine		5.99	Appetizers	Personal	House Burgundy	House Chablis	House Chianti	Register
1 Bake			15.00	Salads	Small	1 Topping NY - Slice	1 Topping Sicilian - Slice	1/2 Cheeseburger	Order Details
1 Budw	eiser		4.00	Pizza	Medium	2 Topping NY - Slice	2 Topping Sicilian - Slice	3 Topping NY - Slice	Pay
				Sandwich	Large	3 Topping Sicilian - Slice	Alfredo Fettuccine	Antipasta	Save Order
				Entrees	Specialty	Antipasta Salad	Baked White Fish	Baked Ziti	Get Order
				Sides	Slice and Whole	Basket of Garlic Bread	Bloody Mary	BLT Pizza	Print Order
				Kids		BLT Pizza	Bruchetta	Buffalo Calamari	Print Remote
Order #: * Create Ticket L	ibel			Dessert		Buffalo Wings(8)	Cacio e Pepe	Caesar	Find Items
	m Count: Subtotal: Discount:		3 24.99 -4.00			Calamari	Calzone	Cannoli	Misc. Sale
	Tax: Tip: Other:		1.78 0.00 0.00			Caprese Salad	Cheerwine	Cheese Pizza	Open Item Taxable
	Total:		22.77			Cheese Pizza	Cheese Ravioli	Cheese Steak Sub	Open Item Nor Taxable
Balan	Paid: ce Due:		0.00	Cours Sect	Fr. Apply Group Ti	Rease	Take	Complete	Clear
Cash	Credit	D	ebit	Repeat I Line	Remove Split Line By Item	Discount	Info Refr	no Mods	All
III REGI	STER In: EPI Admir	1		(:25:23 PM Apr. 22, 2022	} =

5. Tap **Save Order** to send the order to the kitchen.



Items and Modifiers

You can manually enter items by using the category and subcategory features. Use Modifier pages to organize MODs and find them quickly on the MOD tab. Selected MODs display in yellow in association with the menu item they are modifying.

Depending on how Exatouch is configured, modifiers may be required or optional. The following images depict Modifier pages with merchant required and non-required MODs.

Required Mo	Required Modifiers For:Hall Of Fame Bacon Burger							
Size Min: 1, Max: 1	Heat Min: 1, Max: 1	Sides Min: 1, Max: 1		Register				
Make it 1/2 lb.	Med	Baked Beans		Order Details				
Make it 1/4 lb.	Med Well	Chips		Pay				
Make it 3/4 lb.	Rare	No Side		Save Order				
	Well	Onion Rings		Get Order				
		Seasoned Fries		Print Order				
		Steak Fries		Print Remote				
		Sweet Potato Fries		Find Items				
				Minn				



Optional Modifiers For:Hall Of Fame Bacon Burger							
All Modifiers	Hold	American	Bacon	Bleu Cheese			
Special Instructions	Add \$0.00	Bleu Cheese Crumbles	Cheddar	Chili			
	Sub \$1.50	Fried Jalapeno Bottle Caps	Grilled Mushrooms	Grilled Onions			
	Side of \$0.75	Ketchup	Lacey Swiss	Lettuce			
	Cup of \$0.50	Мауо	Mustard	No Cheese			
	Double \$2.00	Onion Rings (2)	Pepper Jack	Pickles			
		Pineapple Ring	Red Onion	Sauteed Peppers			
		Tomato					



Finding an Open Order

- 1. Navigate to the **Register**.
- 2. Tap Get Order. The list of open orders displays.
- 3. Select an order. Tap **Open** and proceed with the order.

	Time	Order #	Customer/Location/Label	Total	Balance		Staff	
	05/19 01:07 PM	51		\$16.28	\$16.28	1	EPI Admin	
	05/11 10:32 AM	43		\$32.55	\$32.55	Т.	EPI Admin	
	05/09 10:09 AM	41	Adam G	\$34.72	\$34.72	N	EPI Admin	
/05 10 :00 AN	1	40		\$20.6	2 \$	520.62	I EPI Adm	in
	05/02 05:40 PM	39		\$29.30	\$29.30	1	EPI Admin	
	05/02 11:01 AM	37	013	\$39.60	\$39.60	Т	Joe Johnson	
	05/02 11:01 AM	36		\$16.28	\$16.28	Т	EPI Admin	
	04/22 10:48 PM	33	234	\$11.50	\$11.50	N	EPI Admin	
	04/22 10:44 PM	32	Cheri Ellis	\$18.45	\$18.45	Р	EPI Admin	
	04/22 10:43 PM	31	Adam Noble	\$4.34	\$4.34	N	EPI Admin	
	04/22 11:31 AM	30	Angelo Denofrio	\$18.45	\$18.45	N	EPI Admin	
	04/21 11:46 AM	29	007*	\$13.02	\$13.02	Т	EPI Admin	
	04/21 11:45 AM	28	*	\$16.28	\$16.28	Т.	Aaron A.	
	04/21 11:42 AM	27	*	\$18.45	\$18.45	Т	Aaron A.	
	04/20 04:56 PM	26	007*	\$16.28	\$16.28	1 A atia	EPI Admin	
l.	Search:			`			Settings to activate Wir	ndi ws.

Merging Orders

- 1. From the **Register**, tap **Get Order**.
- 2. Select the first desired order to merge from the Open Orders list.
- 3. Tap Join In.
- 4. Select a second order.
- 5. Tap **Save Join** to finalize the merge.

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Starting a Customer Tab

Open customer tabs in the Register with the Tab Auth feature.

NOTE: Tab Auth must be enabled to use this feature. See: Tab Auth Set Up.

- 1. Create an order by selecting items at the **Register**.
- 2. Select Tab Auth.
- 3. Insert or swipe the card the customer uses for payment. The **Tab Auth** feature applies the

cardholder's name to the order label and runs a pre-authorization of the customer's card to ensure

it has sufficient funds to cover the purchase.

- Once the card is authorized, an itemized receipt prints. Return the receipt and card to the customer. The customer's card will no longer be needed to run or close the tab.
- 5. To add items to the customer's order, tap **Get Order** to access open orders.
- 6. Select the customer's and tap **Open**.

	Open Orders							
	Time	Order #	Customer/Location/Label	Total	Balance		Staff	
	05/19 01:07 PM	51		\$16.28	\$16.28	Т	EPI Admin	
	05/11 10:32 AM	43		\$32.55	\$32.55	I.	EPI Admin	
	05/09 10:09 AM	41	Adam G	\$34.72	\$34.72	N	EPI Admin	
05/05 10:00	АМ	40		\$20.62	2 \$	20.62	I EPI Ad	min
	05/02 05:40 PM	39		\$29.30	\$29.30	T.	EPI Admin	
	05/02 11:01 AM	37	013	\$39.60	\$39.60	Т	Joe Johnson	
	05/02 11:01 AM	36		\$16.28	\$16.28	Т	EPI Admin	
	04/22 10:48 PM	33	234	\$11.50	\$11.50	N	EPI Admin	
	04/22 10:44 PM	32	Cheri Ellis	\$18.45	\$18.45	Р	EPI Admin	
	04/22 10:43 PM	31	Adam Noble	\$4.34	\$4.34	N	EPI Admin	
	04/22 11:31 AM	30	Angelo Denofrio	\$18.45	\$18.45	N	EPI Admin	
	04/21 11:46 AM	29	007*	\$13.02	\$13.02	I	EPI Admin	
	04/21 11:45 AM	28	*	\$16.28	\$16.28	I	Aaron A.	
	04/21 11:42 AM	27	*	\$18.45	\$18.45	I.	Aaron A.	
	04/20 04:56 PM	26	007*	\$16.28	\$16.28	1	EPI Admin	
	Search:	· · · · · · · · · · · · · · · · · · ·					rate Windows Settings to activate V	Vindews.
		Void Join Order In	Copy Order	Send Email P	review Prin	t	Print Remote	Open



 Add more items as desired until the customer is ready to close their tab. See Closing a Customer Tab (below) for more details.

Closing a Customer Tab

- 1. From the **Register**, tap **Get Order**.
- 2. Find the customer's order and tap **Open**.
- 3. Once the order opens, Tab Complete displays instead of Tab Auth. Tap Tab Complete.

NOTE: Always close Tab Auth by using Tab Complete and NOT Complete Auth.

- 4. When prompted, enter a tip amount from the merchant's signature copy of the receipt.
- 5. Tap **OK** to complete the **Tab Auth**.

Dine In	Take Out	Pick Up	Delivery	Delivery Service	Beverage	IS						Floor Plan
1	Alfredo F	ettuccine		5.99	Appetize							Register
1	Baked Zit			15.00	Salads							Order Details
1	Budweise	er		4.00	Pizza							Pay
					Sandwic	h						Save Order
												Get Order
					Sides							Print Order
Ordered	и.				Kids							Print Remote
Order #	Ŧ: Ticket Labe	i										Find Items
		Count: btotal: count:	1	3 24.99 -4.00								Misc. Sale
		Tax: Tip: Other:		1.78 0.00 0.00								Open Item Taxable
		otal:		22.77								Open Item Non Taxable
	Balance	Paid: Due:	-	0.00	Course Seats	Fire	Apply Group Tip	Reassign	Take		Complete Auth	Clear
Cas	h	Credit	Tal	o Auth	Repeat Line	Remove Line	Split By Item	Discount	Info	Refresh Promo	Mods	All
	REGIST Logged In:	ER EPI Admir	n			<u>ک</u> ا ()	J 👜			03:08: Fri. Apr. :		} ≡

Navigating the Floor Plan

The Floor Plan displays tangible views of the table setup and quick information about table assignments, order information, and table status. Access the **Floor Plan** app directly from the register by tapping the **Floor Plan** tab.



Exatouch also can be configured to display the **Floor Plan** by default. This is recommended for restaurants whose business primarily comes from table orders. System Administrator permissions are required to configure default display modes.



Viewing Floor Plans

You can view floor plans from the **Register**. Perform the following to view floor plans:

- 1. Navigate to the **Register**.
- 2. If your register does not default to the Floor Plan, select the Floor Plan tab.

Viewing Table Status

From the Floor Plan view, use the Status feature to view each table's status.

- 1. Navigate to the Register.
- 2. If your register does not default to the Floor Plan, select the Floor Plan tab.
- 3. Tap Status.
- 4. View table status detail beneath each table icon.



Table Status Descriptions

Status	Description
Open	Table is open and available for customers (light green).
Occupied	Table is reserved or occupied or a customer (sky blue).
Ordered	Table is occupied by a customer who has placed an order (medium blue).
Check	Table is still occupied, but the check has been printed (golden yellow).
Clean Up	Table is no longer occupied and being cleaned for the next customer (turquoise).
Split Order	Table has a split order (midnight blue).

The following describes the various table status states in the Floor Plan view:

Place an Order from the Floor Plan

1. In **Floor Plan** view, tap the table you are waiting on. If you cannot see your tables, navigate to the

Register screen, and tap Floor Plan.

2. Once you've selected the table, tap **Order** from the pop-up menu.

	Location: 013 Section: Default Section Status: Open	Take Reassign	Available Occupied	Move To Join To	Apply Group Tip Fire Next	Complete CC Auth Print Check
•••	Last Event: 4/6/2022 7:26:39 AM Order#: N/A Staff: EPI Admin	Close	Cash	Credit	PIN Debit	Order

3. You may now place an order.

Joining Tables

Tables can be joined from the **Floor Plan** screen. Both tables must have open orders associated with them before they can be joined.

- 1. Select the first table.
- 2. Tap Join To.
- 3. Select the second table.



4. The two tables join, and the first table's status changes to **Clean Up**.

Reassigning Tables

Tables with orders attached can be reassigned to another wait staff member from the Floor Plan.

- 1. Navigate to the **Register**.
- 2. Select the Floor Plan tab.
- 3. Tap a table with an active order attached. Tables with active orders are colored blue by default.



- 4. Note the current staff assignment, and then select Reassign.
- 5. Choose the name of the employee to whom you wish to reassign. Use the search field to narrow your search.

Collecting Payments

Accepting Payment Directly in the Register App

Quick Pay options display on the **Register** and include **Cash**, **Credit**, or **Debit** payments as default payment types. Some bars and restaurants may also have a **Tab Auth** / **Tab Complete** option configured.



	REGIST					()	۔ ک				08:40: Mon. Jul. 1		h =
Cash		Credit		Tab Aut							Aloha Burger		Clear All
	Balance I	Paid:		0.00	Repeat Line		nove ine	Split By item	Discount	Info	Refresh Promo	Mods	
		otal:		0.00	Course Seats	F	ire	Apply Group Tip	Reassign	Take	# eGift	Complete Auth	Open Item Non Taxable
	C	Tip: Dther:		0.00	Merchar	dise							Open Item Taxable
		ototal: :ount: Tax:		0.00 0.00 0.00	Desse	rts							Misc. Sale
* Create 7	licket Label			0.00	Sandwid	ches							Items
Order #	:												Remote Find
					Side								
					Entre	es							Print Order
					Burge	rs							Get Order
					Bread	ls							Send Order
					Soup / S	alad							Pay
					App	s							Order Details
					Bevera	ges							Register
Dine In	Take Out	Pick Up	Delivery	Delivery Service	Pizz	a							Floor Plan

- 1. Enter an order or open a saved customer order.
- 2. Select a payment option.
- 3. Follow the prompts for your selected tender type to complete the payment.

Selecting Other Payment Options

- 1. Enter an order or open a saved customer order.
- 2. Tap Pay to display the Pay screen.
- 3. Select a payment option and follow prompts to complete the transaction.

NOTE: The actual display varies since users can customize how buttons display. Highlighted tabs are enabled; faded tabs are disabled.



Cash	Credit
Manual €C Entry	Tab Complete
Debit	a e gift
EBT	Payout Customer
Rewards	Check
Discounts	Promos & Coupons
Gift Certificate	Delivery Services

Quick Cash Payments

The Pay screen displays likely cash payments your customer may use.

Quick Cash Pay	/ments
19.86	20.00
50.00	100.00

eGiftSolutions Cards

This section provides basic instructions for processing payments made with eGiftSolutions cards. Refer to the online Knowledge Base for <u>more detailed information on eGiftSolutions</u>.

Checking Balances from the Lock Screen

- 1. Select Check Gift Card Balance.
- 2. Swipe the gift card when prompted to display the card balance.

Checking Balances from the Register

- 1. From Home, tap Register.
- 2. Tap **Pay**. The Pay screen displays.
- 3. Tap Check Balance and select eGift.



- 4. Swipe the gift card when prompted to display the card balance.
- 5. View the balance on the receipt that displays.

Checking Balances Online

- 1. Access <u>www.cardbalance.info</u>.
- 2. In the empty field, enter the eGift number from the back of the card.
- 3. Click the **Search** arrow.

Redeeming eGiftSolutions Cards

- 1. Enter an order or open a saved order and tap **Pay**.
- 2. Tap the **eGift** button.
- 3. Enter the **eGift Amount** and tap **Pay**. The Pay screen displays.

NOTE: The eGift amount cannot exceed the total bill.

- 4. Tap Pay or No Receipt, Pay.
- 5. Swipe the eGift card, or tap **Manual Entry** to enter the eGift card number manually.
- 6. Complete transaction as prompted.
- 7. Select and apply other payments to the order, if needed.



Pre-paid Gift Card Payments

Process pre-paid gift cards, such as Visa or Mastercard, the same way as traditional credit or debit cards.

- 1. Create an order or open a saved order.
- 2. Swipe, insert, or tap the gift card on the payment device.
- 3. Tap **Debit** or **Credit**. The Balance pop-up screen displays.
- 4. In the **Debit Amount** field, enter the amount of the gift card to apply, then tap **OK**.
- 5. Continue with the transaction as prompted.
- 6. Tap **Pay** to complete the transaction.

Splitting Payments

Customers can pay with multiple tenders or each member of a party can pay for specific parts of the check.

Split an Order by Item in the Register App

- 1. Enter or open a customer order.
- 2. Tap Split by Item. The Split Item screen displays.
- 3. All items display in the **Order 1** work area.



Г	Order 1				Order 2			Order 4		
	1	Ryan's Crazy Brew								
	1	Ashcraft IPA								
	1	White Claw Watermelon								
	1	Ashcraft Ale								
	1	Taco Tuesday Dinner								
	1	8 Wings		b				Order 5	Subtotal:	\$0.00
		Chipotle BBQ								
		Celery Sticks								
		Ranch Dressing								
					Order 3	Subtotal:	\$0.00			
								Order 6	Subtotal:	\$0.00
		Subtotal:	\$43.99			Subtotal:	\$0.00		Subtotal:	\$0.00
	Clo	se	Reset						Print Orders	Done

- 4. Select an item or items to move.
- Tap the Order 2 work area. Items selected in the Order 1 work area transfer to the Order 2 work area. Repeat as needed.
- Tap Done to complete the order split, or tap Reset to start over. Order 1 retains the original order number, and newly split orders are assigned individual order numbers. Any ticket labels are copied to the new orders.
- 7. Tap Close.
- 8. If Print Orders is enabled, separate checks for each order print when tapping Done.
- 9. Find and open each split order.
- 10. Accept payments directly in the **Register** app.

NOTE: Exatouch supports splitting orders by item up to six ways in a single transaction. To split more orders, reopen the original order with the remaining items and split those items.

EXATOUCH[°]

Adjusting Tips for an Order

After a credit card payment is processed, a tip is added to the merchant copy of the receipt. Card tips must

be added from the station where the order originated. Adjust for tips using the **Complete Auth** function.

- 1. From **Register**, tap **Complete Auth**.
- 2. Select an order and tap **Complete**.
- 3. Enter a tip amount and select OK. Note the "Adjusted Total."

Applying a Group Tip

Add group tips from the **Register**. Gratuity percentages can be predefined by system administrators.

- 1. Navigate to the **Register**.
- Verify the customer's order displays. If not, pull up the customer's order. See Finding an Open Order.
- 3. Tap Apply Group Tip.
- 4. View order subtotals to confirm that a group tip is applied.

Discounting Payments

Manually apply discounts to single items, multiple items, or an entire transaction. Discount settings are set by system administrators. Enter or open a customer order in the Register app.

Discounting Single Items

- 1. Select an item, then tap **Discount**.
- 2. Select the desired discount for the highlighted item and tap Apply.
- 3. The discount amount displays in the order total calculation.
- 4. Tap Undo Discount to remove the discount. Discounted line items display green in the order list.



Discounting an Entire Order

- 1. Enter or open a saved customer order in the **Register**.
- 2. Tap the **Pay** tab. The Pay screen displays.
- 3. Tap Promos & Coupons. A list of available global discounts displays.
- 4. Select a discount or coupon, or use **Search** to find a specific promo. Tap **Apply**.



5. Continue processing the transaction.

Applying an Open Discount

Create an open discount to an entire order.

- 1. Enter or open a saved customer order.
- 2. Tap the **Pay** option. The Pay screen displays.
- 3. Tap **Discounts**.
- 4. Review the order's current **Balance** and enter a discount **Amount**.



- 5. Tap **OK**.
 - Reg ent Type 15.00 Discount Pay Save Order **R**eGift Get Order Print Order Order #: 15 00 Tip 0.00 0.00 Other **Quick Cash Payments** 163.06 Total: 163.06 164.00 Paid 0.00 165.00 170.00 Balance Due: 163.06 200.00 All 00:00:00 AM PAY Logged In: Yetty Taniel ណ фå ≡
- 6. The discount amount displays in the payment grid and reflected in the Total.

Voids and Refunds

Depending on the situation, merchants can cancel transactions and return payments by performing either voids or refunds. Voiding occurs with open or saved orders before batching out a register. Refunds occur after a register has batched out.

Voiding Open or Saved Orders

- 1. Navigate to the **Register**.
- 2. Tap Get Order. The Open Orders screen displays.
- 3. Select a saved order from the list, and then tap Void Order at the bottom.
- After selecting Yes, a pop-up screen displays. Select a Reason from the dropdown and add any notes in the Note field.



Reason:	Cold	~ {}}
Note: Waiter also	provided poor service.	~
	F	
		~
Close		ок

5. Tap **OK**. A pop-up displays verifying the order was voided successfully.

Voiding Payments Before Batching Out

Void orders and payments before <u>batching out the register</u>. Credit or debit cards are not required to void payments.

- 1. From **Register**, tap the **Local Menu**.
- 2. Tap **Refund**.
- 3. On the Refunds screen, tap Find Order.



ltem		SI	KU		Qty	Sell	Ext		
Customer:					_	Patind	Subtotal: \$	0.0	00
Date:					Clear	Refund	Subtotal: \$	0.0	
Date: Order #:		Status:				Refund			00
Date: Order #: Subtotal:	0.00	Status:			Clear Find Items	Refund	Discount:	0.0	00 00
Date: Order #: Subtotal: Discount:	0.00	Status:			Find Items	Refund	Discount: Tax:	0.0 0.0	00 00 00
Date: Order #: Subtotal: Discount: Tax:	0.00 0.00	Status:			Find Items Open Ended		Discount: Tax: Tip:	0.0 0.0 0.0	00 00 00 00
Date: Order #: Subtotal: Discount: Tax: Tip:	0.00 0.00 0.00	Status:			Find Items		Discount: Tax: Tip: Other:	0.0 0.0 0.0 0.0	00 00 00 00
Date: Order #: Subtotal: Discount: Tax: Tip: Fee:	0.00 0.00 0.00 0.00	Status:			Find Items Open Ended Refund Find		Discount: Tax: Tip: Other: Admin Fee:	0.0 0.0 0.0 0.0 0.0	00 00 00 00 00
Date: Order #: Subtotal: Discount: Tax: Tip: Fee: Total:	0.00 0.00 0.00 0.00 0 .00	Status:			Find Items Open Ended Refund		Discount: Tax: Tip: Other: Admin Fee: elivery Fee:	0.0 0.0 0.0 0.0 0.0	00 00 00 00 00
Date: Order #: Subtotal: Discount: Tax: Tip: Fee: Total: Paid:	0.00 0.00 0.00 0.00 0.00 0.00	Status:		→	Find Items Open Ended Refund Find Order		Discount: Tax: Tip: Other: Admin Fee: elivery Fee:	0.0 0.0 0.0 0.0 0.0 0.0 0	00 00 00 00 00 00
Date: Order #: Subtotal: Discount: Tax: Tip: Fee: Total:	0.00 0.00 0.00 0.00 0 .00	Status:		→	Find Items Open Ended Refund Find		Discount: Tax: Tip: Other: Admin Fee: elivery Fee:	0.0 0.0 0.0 0.0 0.0	00 00 00 00 00 00

- 4. Select an order with one or more items to void.
- 5. When the itemized order displays, tap **Void**.

ltem		SKU	Qty	Sell	Ext	 Image: A set of the set of the
Regular Pizza	Regular Pizza 459899223388		1.00	16.99	16.99	
Bacon 434764854850		1.00	0.00	0.00		
Diet Coke 20 oz		498919502195	1.00	1.99	1.99	
Customer: Date: 07/17/2023			Clear	Refund	Subtotal: \$	\$18.98
Order #: 1046		Status: Completed			Discount: Tax:	\$0.00 \$0.00
Subtotal:	\$18.98	Cash: \$18.98	Find Items		Tip:	\$0.00
Discount:	\$0.00				Other:	\$0.00
Tax:	\$0.00		Open Ended		Admin Fee:	\$0.00
Tip: Fee:	\$0.00 \$0.00		Refund	C	elivery Fee:	\$0.00
	\$18.98		Find Order		Total:	\$18.98
Paid: Refunded:	\$18.98 \$0.00	Recreate Order	Close		Void	Refund
EFUNDS Logged In: EPI Agent		<u>ن</u> ا ک	La La La La La La La La La La La La La L		10:00:30 AM Mon. Jul. 17, 2023	₽

- 6. Select a reason for the void or enter a reason in the Note field, then tap OK.
- 7. A receipt prints displaying the voided payment amount.





Refunding Payments After Batching Out

Merchants can also void closed transactions and issue partial or full refunds. Credit or debit cards are required to process refunds.

By default, the **Refund** button is accessed from the Register's **Local Menu** located at the bottom right of most Exatouch screens.

Partial Refunds

- 1. From **Register**, tap the **Local Menu**.
- 2. Tap **Refund**.
- 3. On the Refunds screen, tap Find Order.
- 4. Select an order with one or more items to refund.
- 5. When the itemized order displays, select only the items to be refunded and tap **Refund**.



	Item	SKU	Qty	Sell	Ext	М
Coors Light		447621902199		2.50	2.50	
Corona Light 487247998039		1.00	2.50	2.50		
Guinness		444714341415	0.00	6.50	0.00	
Heineken		491145764863	0.00	2.50	0.00	
Dizzy Monk Ale		422108298316	1.00	3.50	3.50	м
Jason's IPA		462538964276	1.00	3.50	3.50	
						Т
	\$21.00 -\$0.63 \$0.00 \$0.00 \$0.00	Status: Completed Cash: \$20.37 Club discourt: \$0.66 Mug Gold 3.00%	Clear Find Endod Endod Refund Order Close		Subtotal: \$ Discount: Tax: Tip: Other: Admin Fee: elevery Fee: Total:	12.00 50.30 50.00 50.00 50.00 50.00 50.00 \$11.64 Refund
EFUNI Logged In:	DS EPI Agent	③ û	쪨		10:10:30 AM Mon. Jul. 17, 2023	₽ =

- 6. Select a reason for the refund or enter a reason in the **Note** field, then tap **OK**.
- 7. A refund pop-up displays with the amount to be refunded.

Туре	Reference	Amount	\$	Refund Amt \$	Manual Entry
Cash			20.37	0.00	
Club discount	Mug Gold 3.00%		0.66	0.00	
			To R	efund:	11.64
			Remair	ing amount:	
Close		uto fill	Gift Certificat	. Regift	Refund

- 8. Perform one of the following:
 - a. Tap **Close** to cancel.
 - b. Tap Gift Certificate to add the refund amount to a gift certificate.
 - c. Tap **eGift** to add the refund amount to an eGiftSolutions card.
 - d. Tap **Refund** to issue a refund to the original tender.
- 9. A receipt prints, displaying the refund amount.



Full Refunds

- 1. From **Register**, tap the **Local Menu**.
- 2. Select Refund.
- 3. On the Refunds screen, tap **Find Order**.
- 4. Select an order to refund.
- 5. Verify that order details populate on the Refund screen, then perform the following to complete the transaction:
 - a. For cash, checks, or other currency, tap either **Void** or **Refund** and follow the prompts.
 - For debit, credit, and other electronic payment methods, tap **Refund** and follow the prompts.

Printing Receipts

Print a Receipt from the Register Screen

- 1. Confirm that active orders display within the **Register**.
- 2. Select **Print Order**.

Reprinting Receipts

- 1. From **Register**, tap **Reprint**. This tab is located by default in the **Local Menu**.
- Select an available order, or search by Customer, Item, Service, Staff, Card Number, or Date. Use the Search field to search by function, such as Order, Time, Customer/Label, Machine, or Total \$.
- 3. Tap a print option, such as **Print**, **Gift Receipt**, or **Email Receipt**.
- 4. Tap Close.



Reprint a Receipt from the Saved Order Screen

- 1. At the **Register**, tap **Get Order**.
- 2. Select an Order.
- 3. Tap Print Order.

Customer Management

Finding Customer Details

Find customer profiles and corresponding details in the **Customers** module. Refer to the online Knowledge Base for <u>more detailed information about customer management functions</u>.

- 1. From Home, tap Customers.
- 2. Select **Customer List**, and then select a customer.

NOTE: Navigate by scrolling, using the Search field, or tapping Advanced Customer Search.

First Name	Last Name	Phone	Email	Other
Aaron	Tarka	7725551212		
Adam	Noble	5615550101		
Alex	Mozingo	8435551212	jack@elecronicpayments.com	
Angelo	Denofrio	5615552020		
Antonio	Delorentis	5615551010		
Bill	Smith	8455906496	Ryan@electronic.com	
Bobby	Clarke	5615550104		
Bonnie	Воусе	5615550102		
Brent	Whitt	8435551215		
Brian	Johnson	5615553636		
Bruce	Collins	5615553843		
Burt	Beasley	5615553847		
Carolina	Herrera	5615553849		_
Charlie	Sandford	8435551213		
Search:	Advance Customer S	ed Clear earch Search Re	sults Print List	Report
CUSTOMERS I Logged In: EPI Age	-IST nt	ତ ଲି	09	5:14:08 PM



Checking Loyalty Balances

Loyalty rewards balances can be viewed using the following methods. Customers must be attached to an order to view balances. Refer to the Knowledge Base for more detailed information about <u>Loyalty Rewards</u>.

View Balances from Order Details

- 1. From **Home**, tap **Register**.
- 2. Tap the Order Details tab.
- 3. Select the Search button.

Qty	Description			ѕки		Pric	e	Ext	Register
									Order Details
									Pay
									Send Order
									Get Order
									Print Order
-	→ α	Notes	;			Order #	:		Print Remote
					\sim		m Count:	0.00	
							Subtotal: Discount:	0.00	
							Tax:	0.00	Misc.
							Tip:	0.00	Sale
							Other:	0.00	Open Item
					~		Total:	0.00	Taxable Open Item Non
			Remove Line	Add Service		Misc. Scale	Discount	Add/Mod Tips	Item Non Taxable
Custor Detai	ner Manage Is Address History		Pay Out/In	Sell Gift Cert			Refresh Promo		Clear All
CRDER DE Logged In: EPI	TAILS Agent	\bigotimes	ណ៍	ß			11:46 Tue. Apr	5: 14 AM r. 26, 2022	⊕ ≡

- 4. Select a customer. Use the **Search** or **Phone #** fields to search for an existing customer.
- 5. Tap Go To Order.
- 6. The Order Details screen displays with the customer's loyalty balance (if any) populated along with their contact information in the **Customer Details** section.



View Balances on Register Pay Tab

In this scenario, the customer has already been attached to an order.

- 1. Tap **Pay**.
- 2. Tap Check Balance.
- 3. Select **Loyalty** to view a list of saved customers.
- Select a saved customer and tap **OK**. A receipt displays with the customer's Rewards balance.
 Depending on how settings are configured, the balance will either display on the screen or print from a printer.



View Balances in Customer Details

- 1. From **Home**, navigate to **Customers > Customer List**.
- 2. Select a customer. Use the **Search** or **Phone #** fields to search for an existing customer.
- 3. View Loyalty balances on the customer information page.



First Name *	Sandie	Membership	1	Details
Last Name *	Johnson	No	Exclusive for	
Sr./Jr./Etc.	Mobile Carrier	From		Notes
Telephone *	561-555-3852 ~	Expire _/_/		Delivery Addresses
Email *			ub 2	
Address	754 Sea Island Drive	Loyalty Member Loyalty Rewards Available	Cub 3	
		Points	Cub 4	
City	Pompano Beach v	Dollars 0.00	Cub 5	
State	FL ~ Zip: 33069 ~		Club 6	List
Delivery Instruction Date Of Birth				First Rec
Gender				Prev

Managing Banks

The Bank tracks cash from the cash drawer at the end of a shift. Users can review bank activity and identify discrepancies between shift activity and any missing money.

Important: Accuracy is critical when managing banks. Any errors translate through the rest of the bank.

Opening a Bank

- 1. Navigate to the **Register** and tap the **Local Menu** icon at the bottom right corner.
- 2. Tap Bank Manager. The Bank Manager screen displays.

Fror	n	То	Status	Staff	N	lachine	
Date:	04/21/2022		New bank				Amount
Machine:	Open		Notes:		Penny:	0	
Supervisor:		\sim	Notes.	^	Nickel:	0	
Staff:		~			Dime:	0	
Drawer:					Quarter:	0	
Start:	07:00 AM				\$1.00:	0	
Close:					\$5.00:	0	
Swap In:					\$10.00:	0	
Swap Out:					\$20.00:	0	
				~	\$50.00:	0	
					\$100.00:	0	
				~	Total:		0.00
Close	Reset	Open Drawer	Duplicate Void Bank Bank		Print		Save



- 3. In the **Date** field, select a date that the bank will be used.
- Tap the Supervisor drop-down menu to select who will be responsible for managing and reconciling the cash drawer.
- 5. Tap the **Staff** drop-down menu and select the staff member who will be using the cash drawer.
- 6. Enter Start and Close times. This data is for reporting purposes only, indicating when a cash drawer is expected to be used. Regardless of times specified, a bank can be swapped in or out when a merchant chooses.
- Enter the cash-in drawer amounts. You don't need to enter the exact monetary denominations.
 Verify the Total amount is accurate. You can enter accurate denominations later when you reconcile the drawer.
- 8. Tap Save.

Swapping in a Bank

- 1. From **Register**, tap the **Local Menu**.
- 2. Tap Bank Swap.
- 3. Select a bank and tap Swap.
- 4. A pop-up notice displays stating the bank has been swapped in.

NOTE: If there is only one bank in your system, Exatouch will swap the one bank automatically. If multiple banks are listed, you'll be prompted to select a bank.

5. When the shift ends, the bank is removed from circulation by swapping out the bank.

Swapping out a Bank

- 6. From **Register**, tap the **Local Menu**.
- 7. Tap Bank Swap.



- 8. Select a bank.
 - a. If you have only one bank, the system will swap the bank in automatically. When prompted,
 tap Yes.
 - b. If multiple banks are engaged, you'll be prompted to select a bank from the Bank list. Select a bank and tap Yes.

Closing a Bank

- 1. Select a Bank and navigate to the **Bank Manager**.
- Click to highlight a bank to close. Be sure the bank has been swapped out, as designated by Status:
 Out. Multiple banks may be listed.
- 3. Review Bank Operation Times.
- 4. Close Shift.
- 5. Count the cash in the drawer and enter the total in the **Cash** column.
- 6. Review Bank Report.



Running Reports

Exatouch features over 70 report functions for both summaries and granular information about staff, sales, items, purchasing, and deliveries. Reports fall under the following categories:

- Appt's: Schedule any available report to run and send by email.
- Customer: Schedule any available report to run and send by email.
- Delivery: Schedule any available report to run and send by email.
- Items: Schedule any available report to run and send by email.
- Purchasing: Schedule any available report to run and send by email.
- **Sales:** Schedule any available report to run and send by email. Note: the Snapshot and Station Snapshot reports cannot be scheduled.
- **Staff:** Schedule any available report to run and send by email. Note: the Staff Shift report cannot be scheduled.

How to Run Reports

- 1. From Home, tap Reports.
- 2. Select a category.
- 3. Choose a report you wish to view.

Email & Print Reports

- **Reports can be printed if you have a Report Printer**. A report printer will enable you to print reports directly from Exatouch.
- Email Settings must be enabled for printing. If your Email Settings are enabled, you can email reports to a designated email address. From email, reports can be printed on your individual printer.
- **Report Formats**. Reports can be emailed and printed in Excel, PDF, and Word format.



Troubleshooting

Review the following table to find common troubleshooting issues and possible solutions:

Function	Issue	Solution(s)
Home Screen	Not able to exit Kiosk Mode after clicking Kiosk Mode module.	Double-click the Exatouch logo at the bottom right to display a numeric keypad. Enter your PIN to return to the Home screen.
Clocking In (Out	Can't clock in/out	Clock Lock icon to access Log in screen
Clocking In/Out		Tap Clock In or Clock Out first, then enter PIN
	Can't find an order	From the Register , tap Get Order . Select the order from the Open Orders display
Orders	Can't open a customer tab	Make sure the Tab Auth feature has been enabled
	Unable to join tables	In Floor Plan view, verify both tables display Ordered as the status.
+Age Verification	State issued cards won't swipe	If card swiping or scanning fails, tap Manual Entry to enter DOB manually
	or scan	Tap Override to skip age verification altogether



Function	Issue	Solution(s)
		From Home , select Customer > Customer List . Select a customer to view loyalty points on Customer Detail work area.
	Unable to check loyalty point balances	From Register , tap Order Details . Click magnifying class icon. Select customer from list and click Go To Order . Loyalty balance displays along with other customer information
Miscellaneous		From Register , click Pay . On the Pay screen, click Check Balance > Loyalty
		Customer is not enrolled and/or saved into system.
		No Internet connection is present. Contact a manager if the Offline Mode message displays.
	An Offline Mode message	
	displays	NOTE: Transactions can be processed offline. See the <u>Open</u> <u>Batch Settlement of Offline</u>
		Transactions topic in the Knowledge Base for details.



Exatouch Wiring Diagram



Scan the QR Code to see Exatouch Quick Reference and User Guides:



Any questions? We're here to help! Contact our 24/7 Technical Support Team at (800) 966-5520 – Option 3 or email us at support@electronicpayments.com.