

Installation Questionnaire

Store Information:

Client Name:	
Store Name:	
Contact Name:	
Contact Phone #:	
Email:	
(City, State, Zip)	
Store Phone #:	
Store Fax #:	
Website:	

Hours of Operation:

Day	Open/Close Time	Lunch	Dinner	Other
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

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Order Types:

Please check the order types you offer.

Quick Sale	
Dine In	
Take Out	
Delivery	
Drive Thru	
Catering	
Pick Up	
Refund	

If your establishment does deliveries, please include the following information:

Delivery Charge Amount	
Label	
Minimum Order Amount	

Menu and Menu Items:

Yes No

Do you have a breakfast menu?		
Do you have a lunch menu?		
Do you have a dinner menu?		
Do you have an alcohol menu?		
Do you have a dessert menu?		
Do you have a kid's menu?		
Do you have a daily specials menu?		
Do you have a retail (clothing, gift items) menu?		
Do you have menus that will run on specific schedules? If yes, specify which and what times in a separate attachment		
Do you have any menus that change prices during different hours of the day?		
- If yes, please specify which menus change price and when price takes effect in a separate attachment.		

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Tax Rates:

Menu Item	Tax Rate %	Tax Included in Price?	
Food		Yes	No
Beer		Yes	No
Wine		Yes	No
Liquor		Yes	No
Non-alcoholic Beverage		Yes	No
Retail		Yes	No
		Yes	No

Payment Methods:

Type	Accept?
Cash	
Credit	
External Credit	
Check	
Coupon	
Gift Card (Mercury, STS, Swipelt)	
Bill (Gift Cards Thru Ordyx)	
External Gift Cards (3rd Party Service)	
Tab	
Other:	

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Comps:

Comp Name	% Amount

Discounts:

Discount Name	% Amount

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Cash Management:

Do servers have a personal bank or make cash payments into a cash drawer?	Personal Bank	Cash Drawer	Both
Are managers alone authorized to take payments?	Managers	Servers Others	Bar
Are cash payments only to be taken on a terminal with a cash drawer?	Yes	No	
Are servers authorized to cash themselves out?	Yes	No	
Are bartenders authorized to cash themselves out?	Yes	No	
Do you pay out credit card tips every night or in payroll	Yes	No	
- If yes, please specify which roles	Servers	Bartenders	Other
Is wait staff authorized to split orders?	Managers	Servers Others	Bar
Do you want wait staff to be forced to declare cash tips?	Managers	Servers Others	Bar
Do you use tip pooling?	Yes	No	
Do you use Auto Gratuity?	Yes	No	
- If yes, what seat minimum and what percentage	Seat #:	%:	

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Petty Cash:

This element of cash management gives an employee access to the cash drawer for miscellaneous withdrawals or deposits that have nothing to do with order taking. Debit- Taking out cash to purchase milk and produce for the restaurant. Credit- Inserting the change received from purchasing the milk and produce for the restaurant. If the user received \$10.00 change from purchasing the produce and milk, the user can enter it as credit.

Name	Debit (Out)	Credit	Unspecified

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Terminals:

Name	Make	Model	Serial #	# of Cash Drawers
TS1				
TS2				
TS3				
TS4				
TS5				
TS6				
TS7				
TS8				
TS9				
TS10				

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Areas:

This will separate out your establishment by area to have different table layouts appear and terminals assigned. Examples of areas: Patio, Bar, Main, Dance Floor, Stage. Please list the area name with table layout and what number terminal will be assigned to that area.

Area Name	Table Layout	Terminal #'s

Customer Receipts:

We populate the header of your customer receipts with your store name, address, phone numbers, date and time stamp and order info (Server name, order name and number, etc.). We give you three lines for the footer and there are 42 characters per line and that includes spaces. If you go over on a line, it will roll over to the next one.

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Your Network:

ISP		Modem		Router	
Is there anything else set up on the router/network? (IE: Cameras, Phone Line)					
Do you have a network switch device?		Yes		No	
What type of switch do you have? How many ports?					
Do you have guest Wifi?		Yes		No	

Roles:

Roles are the different job titles your employees have and must be configured in the system. We have a standard selection of roles that we provide. Please list any additional role and brief description of the things you want that role to be able to perform.

Manager	Able to take and view all orders, apply comps and discounts, void items, and payments, change item pricing
Server	Able to take orders, may or may not take payments, tip adjust
Cashier	Take payments, create customer accounts, split orders
Back Office	Able to access website and make changes to menus, staff, inventory, customers, payroll and reporting
Auditor	Able to access website but only view, cannot make any changes

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Attachments:

Please attach a file containing all your menus, preparations (modifiers, IE: Meat Temp: Rare, Med Rare) and which items those preps will be applied to, prices and any descriptions and info that might be helpful in creating your menu. Please check the box below for the items that you attach.

Staff List	Lunch Menu and Prices	Other Menu and Prices
Table Layout	Dinner Menu and Prices	Liquor Menu and Prices
Breakfast Menu and Prices	Kids Menu and Prices	Happy Hour Menu and Prices