

# Installation Questionnaire

## Store Information:

Client Name:	
Store Name:	
Contact Name:	
Contact Phone #:	
Email:	
Address:	
(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				

# Installation Questionnaire

## Order Types:

Please check the order types you offer.

Quick Sale	<input type="checkbox"/>
Dine In	<input type="checkbox"/>
Take Out	<input type="checkbox"/>
Delivery	<input type="checkbox"/>
Drive Thru	<input type="checkbox"/>
Catering	<input type="checkbox"/>
Pick Up	<input type="checkbox"/>
Refund	<input type="checkbox"/>

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

# Installation Questionnaire

## Tax Rates:

Menu Item	Tax Rate %	Tax Included in Price?	
Food		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Beer		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Wine		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Liquor		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Non-alcoholic Beverage		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Retail		<input type="checkbox"/> Yes	<input type="checkbox"/> No
		<input type="checkbox"/> Yes	<input type="checkbox"/> No

## Payment Methods:

Type	Accept?
Cash	<input type="checkbox"/>
Credit	<input type="checkbox"/>
External Credit	<input type="checkbox"/>
Check	<input type="checkbox"/>
Coupon	<input type="checkbox"/>
GC (Mercury, STS, SwipeIt, Factor 4)	<input type="checkbox"/>
Gift Card(Gift Cards Tonic)	<input type="checkbox"/>
External Gift Cards (3rd Party Service)	<input type="checkbox"/>
Tab	<input type="checkbox"/>
Other:	<input type="checkbox"/>



# Installation Questionnaire

## Cash Management:

Do servers have a personal bank or make cash payments into a cash drawer?	<input type="checkbox"/> Personal Bank	<input type="checkbox"/> Cash Drawer	<input type="checkbox"/> Both
Who is authorized to take cash payments?	<input type="checkbox"/> Managers	<input type="checkbox"/> Servers <input type="checkbox"/> Others	<input type="checkbox"/> Bar
Are cash payments only to be taken on a terminal with a cash drawer?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Do you want to add the "Store wide cash drawer" permission to any role?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Are servers authorized to cash themselves out?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Are bartenders authorized to cash themselves out?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Do you pay out credit card tips every night or in payroll	<input type="checkbox"/> cash Out (every night)		<input type="checkbox"/> Payroll
- If yes, please specify which roles	<input type="checkbox"/> Servers	<input type="checkbox"/> Bartenders	<input type="checkbox"/> Other
Is wait staff authorized to split orders?	<input type="checkbox"/> Managers	<input type="checkbox"/> Servers <input type="checkbox"/> Others	<input type="checkbox"/> Bar
Do you want wait staff to be forced to declare cash tips?	<input type="checkbox"/> Managers	<input type="checkbox"/> Servers <input type="checkbox"/> Others	<input type="checkbox"/> Bar
Do you use tip pooling?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Do you use Auto Gratuity?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
- If yes, what seat minimum and what percentage	Seat #:		%:
Do you use Cash discount/Dual pricing?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
If so, which one and what is the percentage?			

# Installation Questionnaire

## 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
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Installation Questionnaire

Terminals:

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

# Installation Questionnaire

## 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
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	

## 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.




# Installation Questionnaire

## Printers:

A printer can be used to print receipts for terminals, service tickets to the kitchen, bar, or handhelds receipts. Receipt printers for terminals are connected to the terminal by one of 3 connections: Parallel, Serial or USB. Kitchen/Bar printers are not connected directly to the terminals, but instead are connected directly into the router. Sample Names: Bar, Grill, Pantry, Expo, Salad, Dessert, Kitchen.

Printer Name	Make	Model (TM #)	Serial #	IP Address	Connection Type

# Installation Questionnaire

## 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?		<input type="checkbox"/> Yes		<input type="checkbox"/> No	
What type of switch do you have? How many ports?					
Do you have guest Wifi?		<input type="checkbox"/> Yes		<input type="checkbox"/> 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



# Installation Questionnaire

## 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.

<input type="checkbox"/> Staff List	<input type="checkbox"/> Lunch Menu and Prices	<input type="checkbox"/> Other Menu and Prices
<input type="checkbox"/> Table Layout	<input type="checkbox"/> Dinner Menu and Prices	<input type="checkbox"/> Liquor Menu and Prices
<input type="checkbox"/> Breakfast Menu and Prices	<input type="checkbox"/> Kids Menu and Prices	<input type="checkbox"/> Happy Hour Menu and Prices