

CONFIGURING YOUR POS FOR TAKE AWAY OPERATION

Pre-Requisites

- Squirrel Professional (all supported versions)
- SIAB 9.1+
- Squirrel CRM Add-On is not required and must NOT be installed.
- Dine in operations are closed and changing to taking phone in orders.
- No existing online ordering integrated interface or Squirrel CRM Module
- **Take Away requires an external USB Keyboard to be plugged into the Squirrel workstation.**

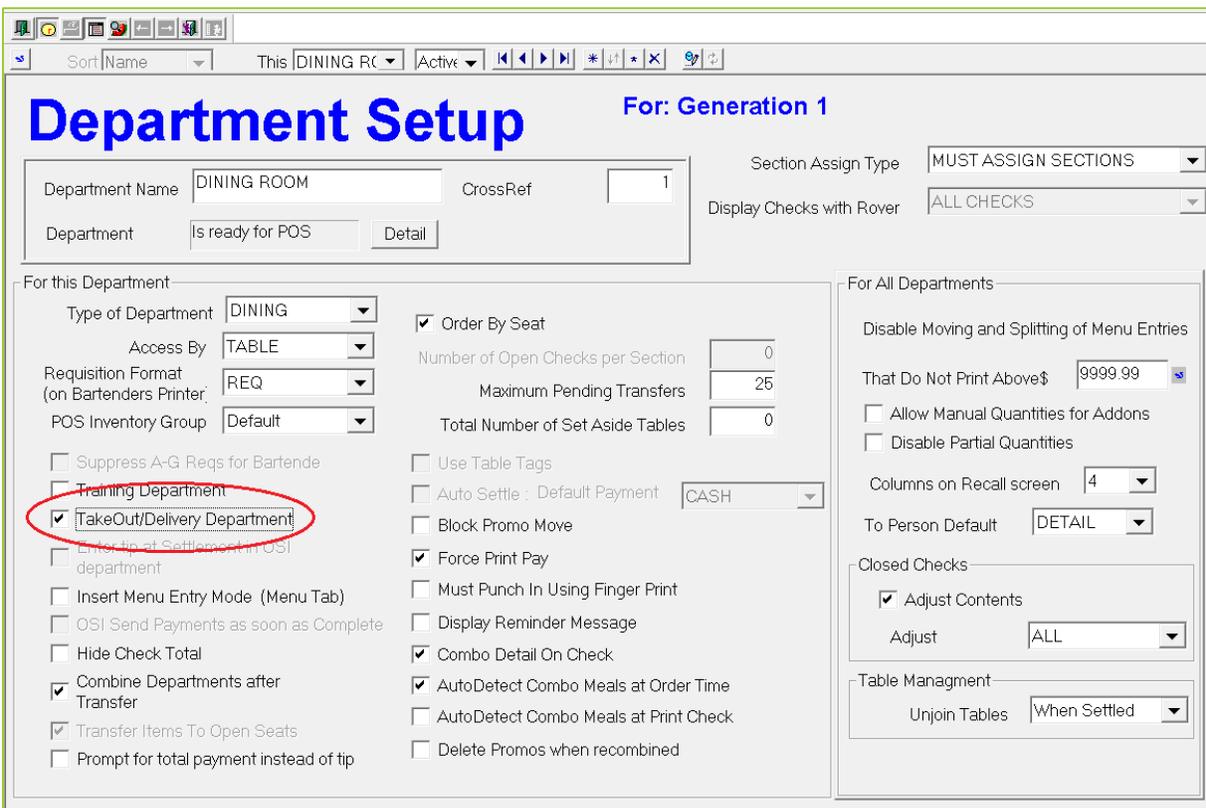
Configuration

Back Office Configuration

****Changes do not take effect until the next START BUSINESS DAY****

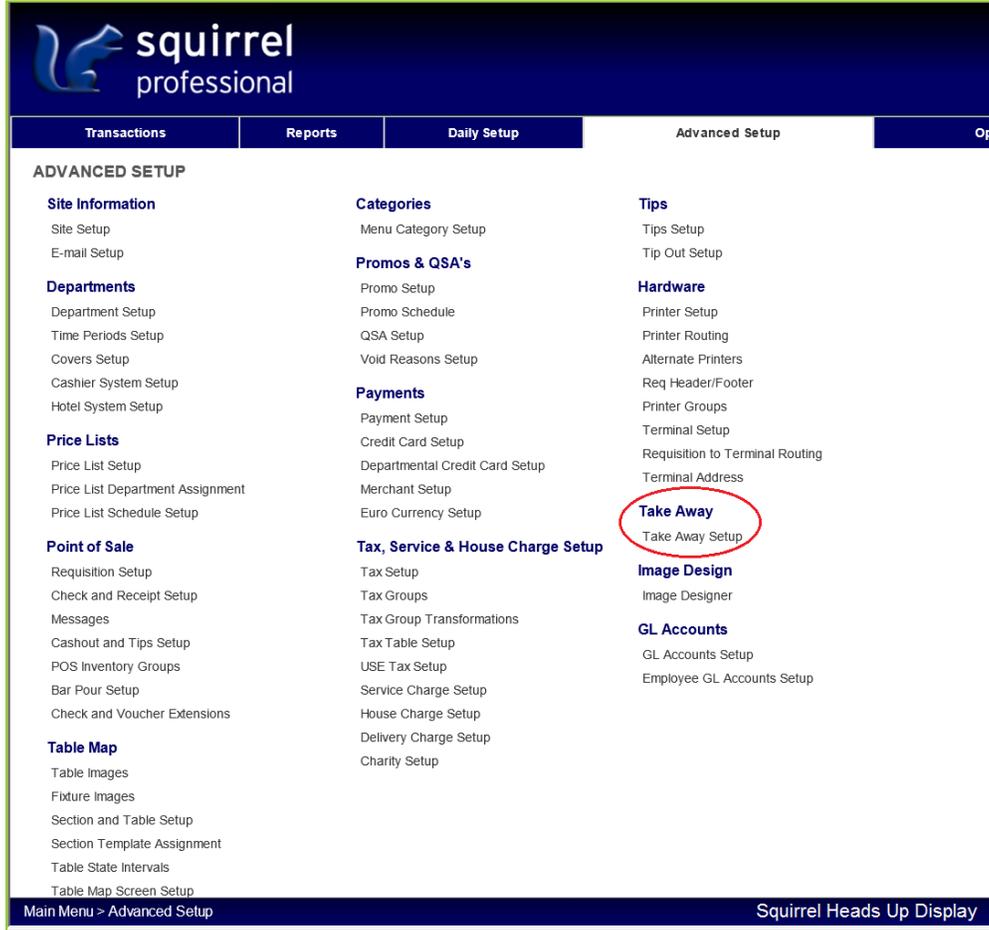
Advanced Setup | Department Setup

The Take Away option is set up on a per department basis; the department may be a dining or a bar department. The flag that must be configured is in Advanced Setup | Department Setup 'Takeout/Delivery Department'. If dine in operations are closed, use an existing department(s) that you would like to use for ordering. **DO NOT create a new department**, if you require this please contact squirrel support.



Advanced Setup | Take Away Setup

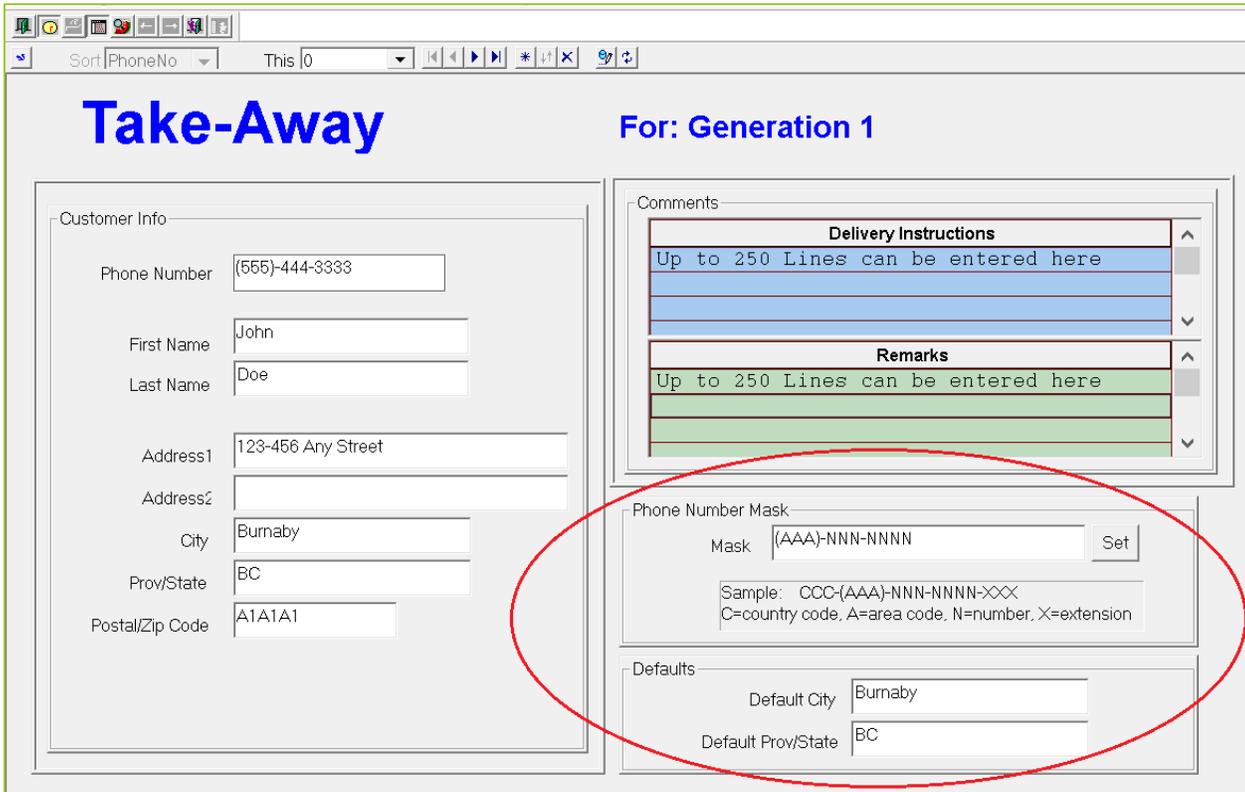
The other screen that must be configured is in Advanced Setup called Take Away Setup. This is where phone format and city/province/state defaults are configured on this page.



The screenshot shows the 'Advanced Setup' menu in Squirrel Professional. The menu is organized into several categories, and the 'Take Away' option is highlighted with a red circle.

Transactions	Reports	Daily Setup	Advanced Setup	Op
ADVANCED SETUP				
Site Information		Categories		Tips
Site Setup		Menu Category Setup		Tips Setup
E-mail Setup		Promos & QSA's		Tip Out Setup
Departments		Promo Setup		Hardware
Department Setup		Promo Schedule		Printer Setup
Time Periods Setup		QSA Setup		Printer Routing
Covers Setup		Void Reasons Setup		Alternate Printers
Cashier System Setup		Payments		Req Header/Footer
Hotel System Setup		Payment Setup		Printer Groups
Price Lists		Credit Card Setup		Terminal Setup
Price List Setup		Departmental Credit Card Setup		Requisition to Terminal Routing
Price List Department Assignment		Merchant Setup		Terminal Address
Price List Schedule Setup		Euro Currency Setup		Take Away
Point of Sale		Tax, Service & House Charge Setup		Take Away Setup
Requisition Setup		Tax Setup		Image Design
Check and Receipt Setup		Tax Groups		Image Designer
Messages		Tax Group Transformations		GL Accounts
Cashout and Tips Setup		Tax Table Setup		GL Accounts Setup
POS Inventory Groups		USE Tax Setup		Employee GL Accounts Setup
Bar Pour Setup		Service Charge Setup		
Check and Voucher Extensions		House Charge Setup		
Table Map		Delivery Charge Setup		
Table Images		Charity Setup		
Fixture Images				
Section and Table Setup				
Section Template Assignment				
Table State Intervals				
Table Map Screen Setup				
Main Menu > Advanced Setup			Squirrel Heads Up Display	

Take Away Setup Screen



Take-Away For: **Generation 1**

Customer Info

Phone Number: (555)-444-3333

First Name: John

Last Name: Doe

Address1: 123-456 Any Street

Address2:

City: Burnaby

Prov/State: BC

Postal/Zip Code: A1A1A1

Comments

Delivery Instructions

Up to 250 Lines can be entered here

Remarks

Up to 250 Lines can be entered here

Phone Number Mask

Mask: (AAA)-NNN-NNNN Set

Sample: CCC-(AAA)-NNN-NNNN-XXXX
C=country code, A=area code, N=number, X=extension

Defaults

Default City: Burnaby

Default Prov/State: BC

Phone Number Mask

The structure of the phone number is configured here. Note: if area code or extension is configured they must be entered at POS with every order; if they are not configured they cannot be entered.

Defaults

A default City and default Province or State may be configured here. They are automatically entered at POS so the employee will not have to enter them with every order. The POS employee may overwrite the defaults at any time for a particular customer.

Customer Info

Customers may be pre-configured in the backend or are entered at POS when they place their order. Press the * button to add a new customer. Phone Number is the only required field on this page. The same phone number may be entered for multiple customers to allow operations such as offices to have the same phone number but retain detail information about individual's orders. The customer information that is configured here appears on the POS screen for the employee to verify. If multiple customers are configured for the same phone number they all appear at POS for the employee to choose from.

Delivery Instructions

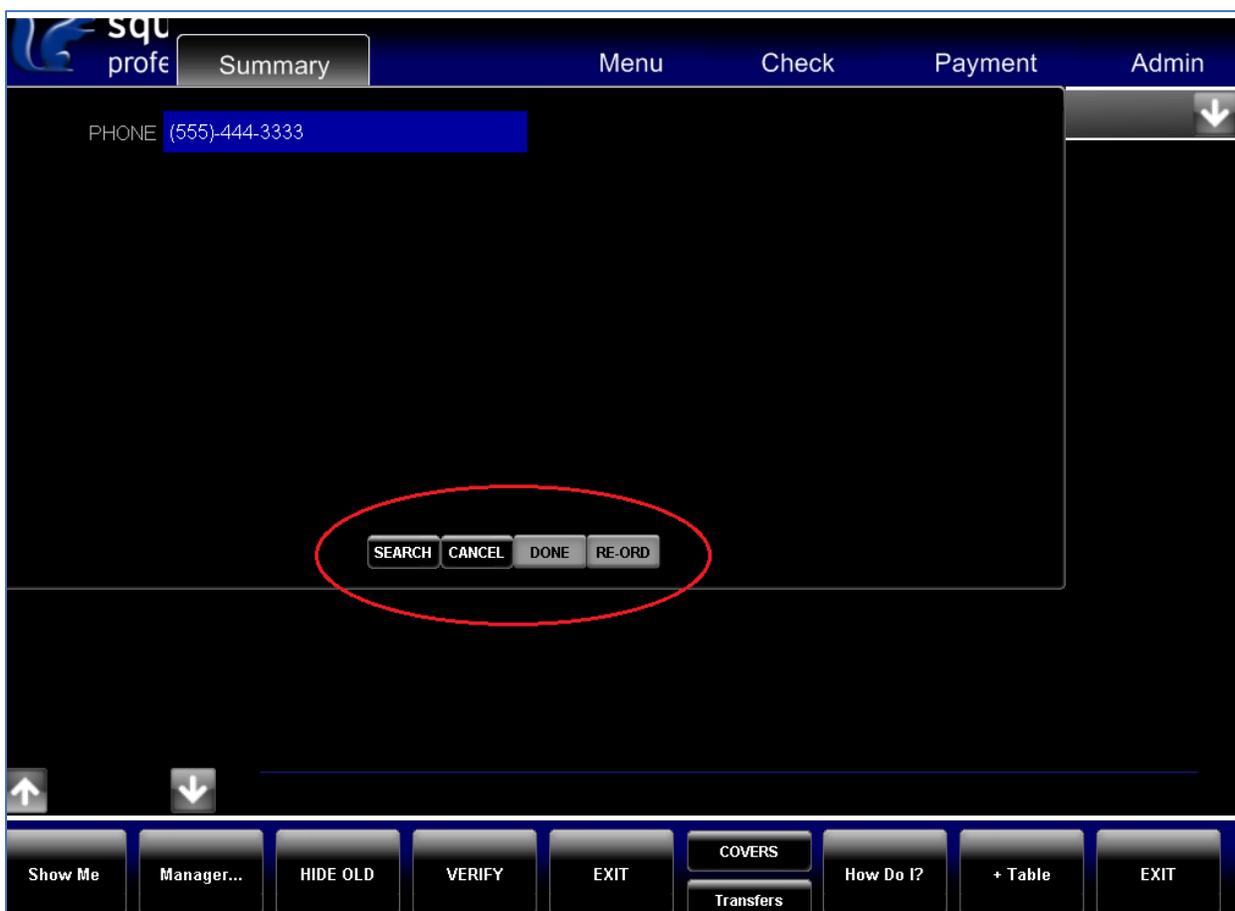
250 lines of delivery instructions can be configured or are entered at POS when they place their order. These instructions print on the guest check for the delivery driver to take when they make the delivery. Note: This box has a minimal set of "control" keys implemented. It recognizes the 4 cursor keys (up, down, left and right) as well as Home and End. It does not recognize enter, delete, insert, pageup, pagedown or tab inside the edit boxes. The arrow down key must be used at the end of each line of typing and it will not wrap the words from line to line. Since there is no insert, it is permanently in "overwrite" mode.

Remarks

250 lines of Remarks can be configured or are entered at POS when they place their order. These remarks appear for the POS employee but will not print on the guest check. Note: the same constraints apply as with the Delivery Instructions.

Point-of-Sale Operation

In a dining department, employees must always touch a table to begin the ordering process. In a bar department, if they are setup to default to the Menu tab, the PHONE number screen appears automatically to begin the ordering process. If they are setup to default to the Summary tab they must touch New Order or the Menu tab to bring up the Phone number screen to begin the ordering process. The latter setup may be the more desirable if the same employees are both ordering and settling, as they won't have to press Cancel (from the phone # screen) every time they need to Print or Settle checks.

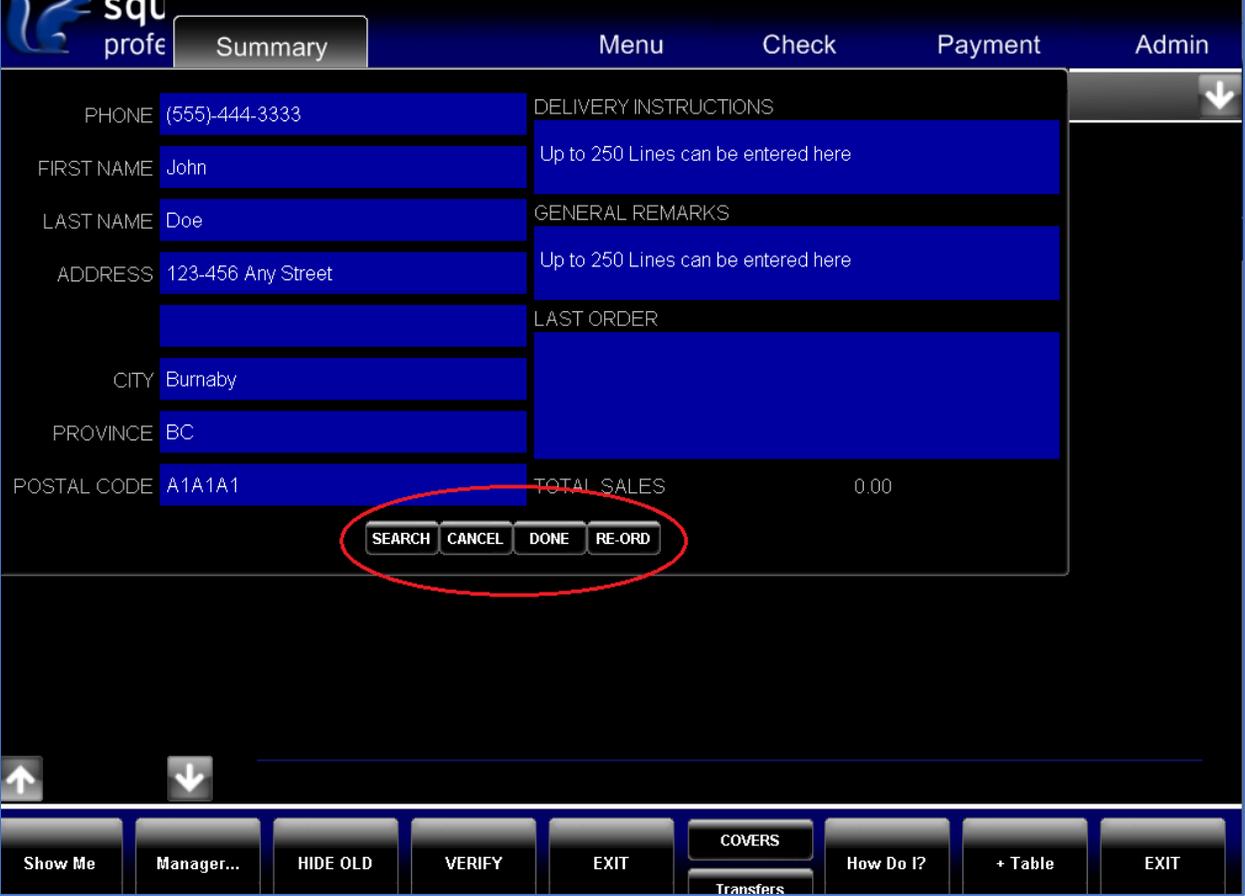


The employee types in the customer's phone number on their external keyboard and presses SEARCH.

If there is more than one customer associated with a phone number, the employee will choose from a pick list which is the desired customer.

NOTE: if the employee leaves the phone number blank and presses SEARCH – all of the customers in the database are listed, sorted alphabetically by last name. Use the scroll buttons to search for the customer.

When an existing customer is selected, their customer information screen appears. If this is a new customer, the customer info screen is blank except for the phone number and default City and Province and the employee can proceed to fill in their information. This will enter the customer information into the database.



PHONE (555)-444-3333
 FIRST NAME John
 LAST NAME Doe
 ADDRESS 123-456 Any Street
 CITY Burnaby
 PROVINCE BC
 POSTAL CODE A1A1A1

DELIVERY INSTRUCTIONS
 Up to 250 Lines can be entered here

GENERAL REMARKS
 Up to 250 Lines can be entered here

LAST ORDER

TOTAL SALES 0.00

SEARCH CANCEL DONE RE-ORD

Show Me Manager... HIDE OLD VERIFY EXIT COVERS Transfers How Do I? + Table EXIT

When they are finished entering the customer information, they press DONE to proceed to the ordering screens.

When an order is complete the employee may press Send to send the order to the kitchen or Check to send the order to the kitchen and print a guest check with Delivery Instructions on it.

The system will display the customer information screen again for verification, Press DONE to continue

squ
profe
Summary
Menu
Check
Payment
Admin

PHONE (55)-444-3333	DELIVERY INSTRUCTIONS	DOUG Z ↓
FIRST NAME John	Up to 250 Lines can be entered here	FdMod
LAST NAME Doe	GENERAL REMARKS	ADD ON
ADDRESS 123-456 Any Street	Up to 250 Lines can be entered here	FEMALE
CITY Burnaby	LAST ORDER	HOLD
PROVINCE BC		IGNORE
POSTAL CODE A1A1A1	TOTAL SALES 0.00	SEE ME

SEARCH
CANCEL
DONE
RE-ORD

RIGATONI

OPEN FOOD

THEATR

TO GO

TYPE IT

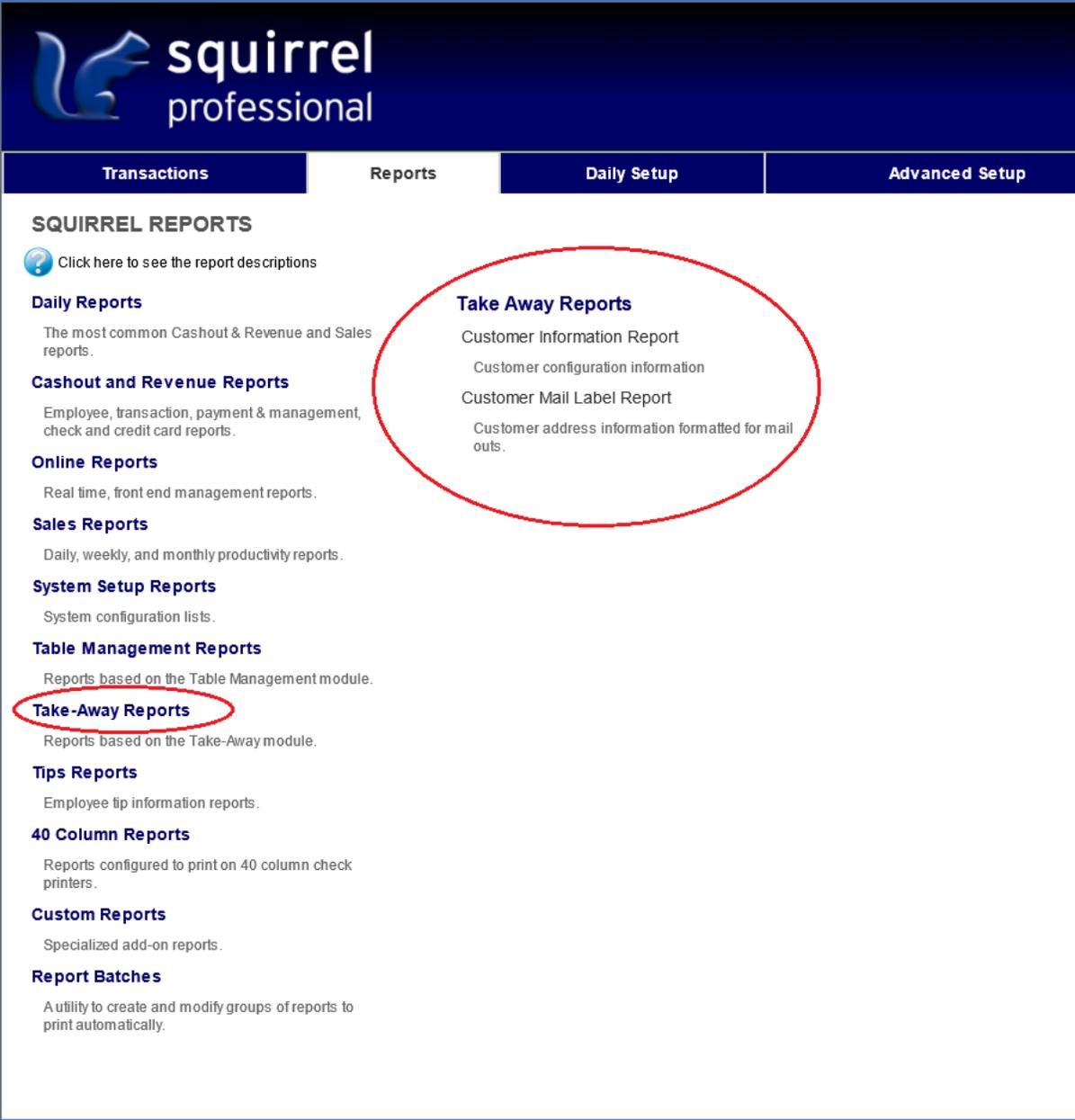
AS READY

Delete
How Do I?
Suspend
COURSE
Re-Order
Quantity
Seat 1
Directory
Send

Override
HIDE OLD
Seat #

Reports

There are two reports available for Take Away:



The screenshot shows the 'Reports' menu in Squirrel Professional. The menu is divided into several sections. A red oval highlights the 'Take Away Reports' section, which includes: Customer Information Report, Customer configuration information, Customer Mail Label Report, and Customer address information formatted for mail outs. Another red oval highlights the 'Take-Away Reports' section under the 'SQUIRREL REPORTS' heading, which includes: Reports based on the Take-Away module.

SQUIRREL REPORTS

[Click here to see the report descriptions](#)

Daily Reports
The most common Cashout & Revenue and Sales reports.

Cashout and Revenue Reports
Employee, transaction, payment & management, check and credit card reports.

Online Reports
Real time, front end management reports.

Sales Reports
Daily, weekly, and monthly productivity reports.

System Setup Reports
System configuration lists.

Table Management Reports
Reports based on the Table Management module.

Take-Away Reports
Reports based on the Take-Away module.

Tips Reports
Employee tip information reports.

40 Column Reports
Reports configured to print on 40 column check printers.

Custom Reports
Specialized add-on reports.

Report Batches
A utility to create and modify groups of reports to print automatically.

Take Away Reports

- Customer Information Report
- Customer configuration information
- Customer Mail Label Report
- Customer address information formatted for mail outs.

When reopening dine-in operations simply remove the check from the Advanced Setup |Department Setup 'Takeout/Delivery Department'.