



Quick Reference Guide for Salido: Server

I. Start of Shift

Clock In to the POS

Using a PIN Code:

1. Enter **PIN** on terminal and tap **orange check mark**
2. Tap appropriate **Job Position** if prompted
3. Confirm you are clocked in

Using a Swipe Card:

1. Tap **Card Reader icon** on PIN screen
2. Swipe employee card
3. Select appropriate **Job Position** if prompted

Open a Cash Bank

1. Enter **PIN** to log in if logged out
 2. Tap **Global Menu** (four squares icon) and select **Cash Banks**
 3. Tap **Open Bank** button
 4. Enter cash amount in **In Dollar Amount** field
 5. Select your name from **Assign To** and tap **Open Bank**
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II. Ordering

Create a New Check (Floor Plan)

1. Tap **Tables** in top left drop-down menu
2. Select **Revenue Center** from top
3. Tap desired **Table**
4. If prompted, select **Order Type** and **Party Size**
5. Tap **Start Order**

Create a New Check (Checks List)

1. Tap **Checks** in top left drop-down menu
2. Tap **+** button in bottom right
3. Select **Order Type**, **Party Size**, **Table**, and **Revenue Center**
4. Tap **Start Order**

Start a Tab with a Credit Card

1. Tap **Check** button or **Floor Plan** button
2. Create New check
3. Choose **Credit Card Payment Method** if prompted
4. **Swipe, Insert, Tap, or Manually Enter** card immediately when modal appears
5. Manually enter **Customer's Name** if not auto-captured
6. Tap **Open Check**

Add Menu Items

1. Tap **Display Group** to view items
2. Tap desired **Menu Item(s)**
3. Tap desired choices in **Modifier Group** if prompted
4. Tap **Save**

Add Special Commands to Modifiers

1. Tap Menu Item to view Modifiers
2. Tap **Show Commands** button at bottom of screen
3. Tap command such as "No", "Extra", or "Light"
4. Tap **Modifier** to apply command
5. Tap **Save**

Add Duplicate Modifiers

1. Select Menu Item and navigate to Modifier Group

2. Tap **Modifier** to add it once
3. Tap **plus sign (+)** on button to increment count
4. Tap **Save**

Assign Items to Seats (If not set to seat position required)

1. Select check from Checks List
2. **Method A:** Tap menu item, select **Seat Position**, and tap **Save**
3. **Method B:** Tap **Seat Hotkey** then tap **Item** to assign

Send Order to Kitchen

1. Verify all items are correct
 2. Tap **Send** at bottom left
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III. Check Management

Split Check by Seat

1. Ensure all items are assigned to seat positions
2. Tap **three dots** for Check Options
3. Tap **Split**
4. Tap **Split By Seat** to auto-create checks
5. Tap **Done**

Split Check by Item

1. Open check and tap **three dots**
2. Tap **Split**
3. Tap **Item(s)** you wish to move
4. Tap **Add to Check** on blank check
5. Tap **Done**

Split an Item

1. Select item on check
2. Tap **Split**
3. Enter number of ways to split item
4. Tap **Confirm Split**

Merge Checks

1. Open check you want to merge (Source Check)

2. Tap **three dots** for Check Options
3. Tap **Merge**
4. Select **Target Check** from list
5. Tap **Merge**

Transfer a Check

1. Open check you want to transfer
2. Tap **three dots** for Check Options
3. Tap **Transfer**
4. Select **Revenue Center, Table, and Server**
5. Tap **Transfer**

Void an Item

1. Select item on check
2. Tap **Void**
3. Select **Void Reason**
4. Enter **Manager PIN** if prompted
5. Tap **Void**

Discount a Check

1. Open check and tap **three dots**
 2. Tap **Discount**
 3. Select **Discount** to apply
 4. Select **Reason** if prompted
 5. Tap **Done**
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IV. Payments

Take a Credit Card Payment

1. Open check and tap **Pay**
2. **Swipe, Insert, Tap, or Manual** credit card
3. Choose credit card **Method** if asked
4. If manual, enter card details
5. (Stationary POS) Flip screen for **Flip & Tip** if enabled
6. Select **Receipt** or tap **Done**

Take a Cash Payment

1. Open check and tap **Pay**
2. Tap **Exact, Custom Amount, or Preset Amount**
3. Enter amount and tap **Next** if Custom
4. Review **Change Due** and tap **Receipt** or **No Receipt**

Process a Partial Payment

1. Tap **Pay**
2. Tap **Partial Payment**
3. Enter payment amount and tap **Next**
4. Select payment method and process

Process Split Payments (Evenly)

1. Tap **Pay**
2. Tap **Split Evenly**
3. Enter number of splits and tap **Next**
4. Process payment for first split
5. Repeat for remaining splits

Add or Edit Tips (Stationary POS)

1. Navigate to check or payment screen
2. Tap **Adjust Tips**
3. Tap **Tip** button next to payment
4. Enter tip amount and tap **Save Tip**

Add Funds to a Gift Card

1. Tap **three dots** inside check
2. Tap **Gift Card**
3. Swipe card or enter number to check balance
4. Choose **Gift Card Method** if prompted
5. Tap **Add Funds** or enter amount in Activate modal
6. Tap **Add to Check** and process payment (Check must be closed for card funds to be available)

V. End of Shift

Verify All Checks Closed

1. Tap **Check** button from **Global Menu** to open Checks List View

2. Ensure no open checks remain under your name

Print Shift Report

1. Tap **Global Menu** (four squares icon) in top right
2. Tap **Shift Report**
3. Retrieve report from printer

Clock Out

1. Tap **Initials** at top right of screen
2. Tap **Clock Out**
3. Confirm by tapping **Clock Out** again