HARBORTOUCH

Harbortouch Online

User Manual

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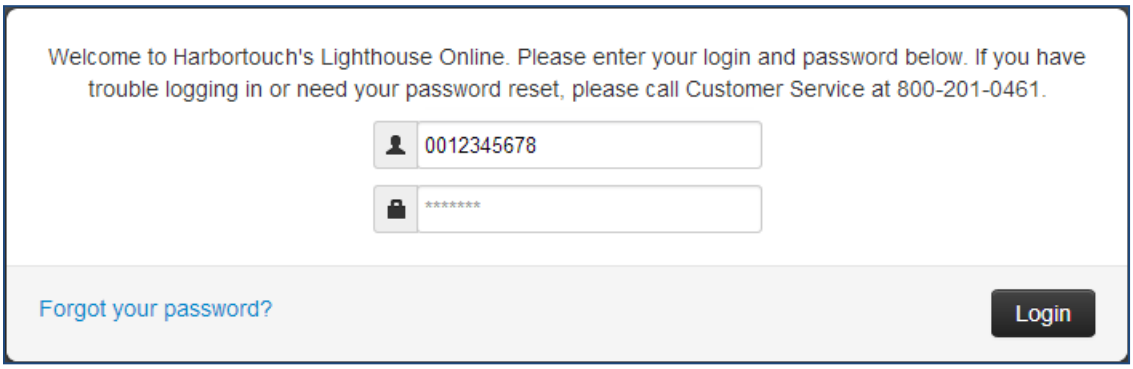
Logging In / Out

1. Open your internet browser
2. Enter hto.harbortouch.com into the address bar and press the Enter key on the keyboard
3. Enter your Harbortouch ID and Password
4. Press the **Login** button on the screen or the Enter key on the keyboard

If you are unable to log into Harbortouch Online it is likely due to either an incorrect Harbortouch ID or Password.

You Harbortouch ID is the same as your Merchant ID (MID) number. It must be 10 digits long when you enter it into the login prompt. If you MID is not 10 digits, enter leading zeros until it is.

Example: An MID of 12345678 should be entered as 0012345678.



If your password meets the above requirements then your password is being entered incorrectly. Ensure CAPS LOCK is not active on your keyboard. If not, you will need to reset your password.

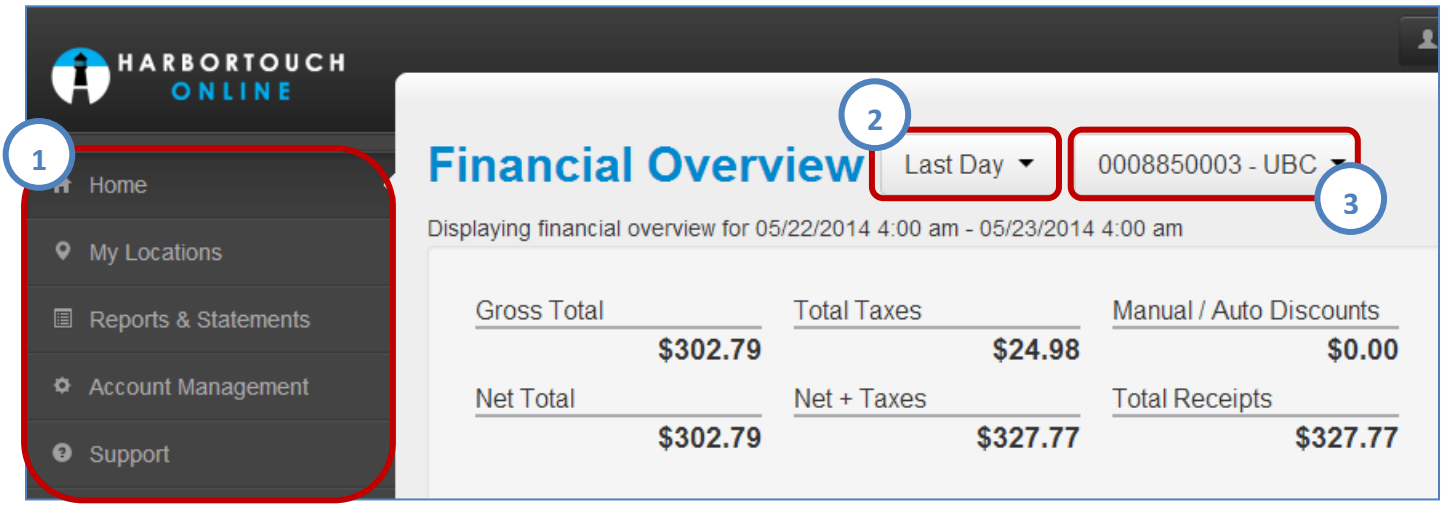
Press the **Forgot your password?** link at the bottom of the login prompt. Enter you MID into both fields and press the **Reset Password** button. A new password will be sent to the email address on the account.

To log out of Harbortouch Online, press the **Logout** button in the top right of the screen.

Home

Immediately after logging into Harbortouch Online, you will be shown the **Home** page. This page is split into three parts. At the top of the page is the Financial Overview. Scrolling down past that will take you to the Processing Data. Scrolling down even more will take you to the News.

To the left, is the **Navigation Pane (1)**. You will use this to access the other areas of Harbortouch Online. It is a persistent element that will be present in all sections of the site.

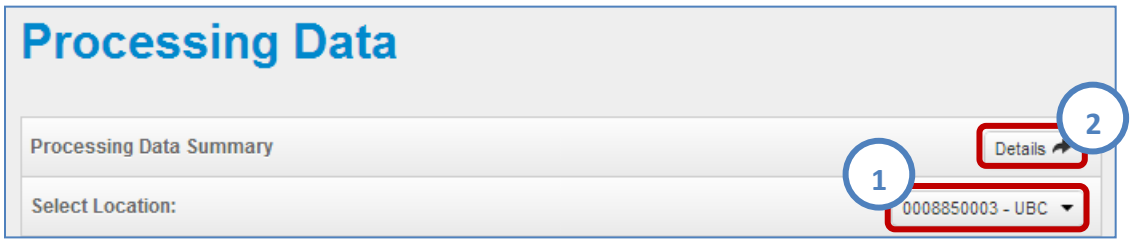


Each of the sections shown here will be discussed in further detail after going over the Home page.

The Financial Overview displays a report summarizing the activity on the Harbortouch POS System. By default it will display information for the most recent business day however this period can be changed using the drop down **(2)** located at the top of the page.

If you have multiple locations, you can select one of the MID's in the rightmost drop down **(3)** in order to view the Financial Overview for a different location.

The Processing Data section displays a listing of the most recent batches and deposits. As with the Financial Overview, you can switch between different merchant locations, provided they exist, using the drop down **(1)** located in the upper right.



Pressing the **Details (2)** Button will open the **Processing Data** section under **Reports & Statements**.

To learn more about the **Processing Data Report**, skip ahead to the Reports & Statements section.

The News section contains notifications regarding the Harbortouch Online system, alerts about upcoming system maintenance, and any general information that comes out of Harbortouch (i.e. newsletters).

News

0008850003 - UBC

POSTED 3/14/2014

SCHEDULED MAINTENANCE

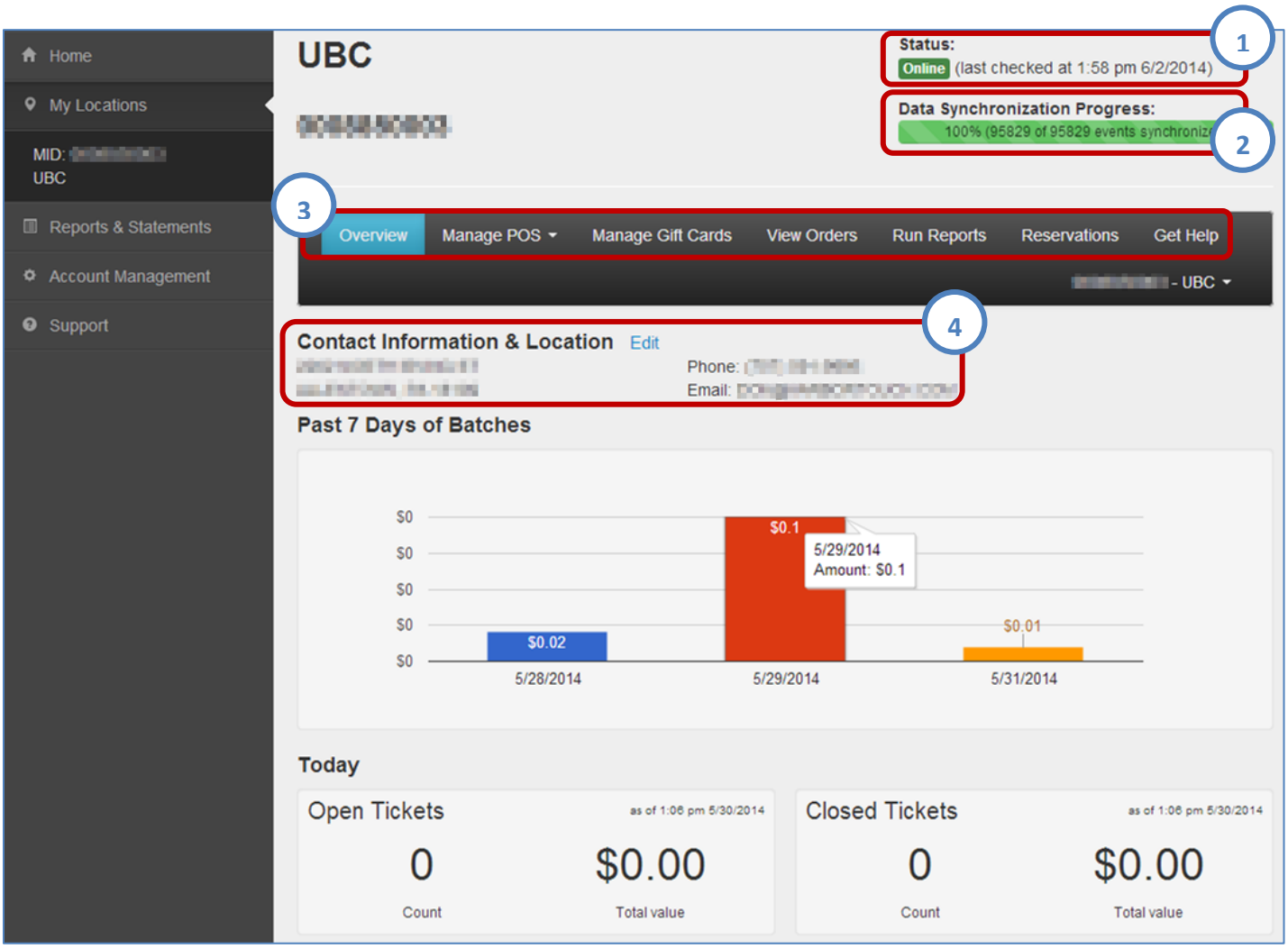
Scheduled system maintenance will begin at 9 PM EST on 3/14/2014 and will last till 9 PM on 3/16/2014. During this time, batch and transaction data for February 2014 will not be available. All other reports will be functional and available. We apologize for this inconvenience and thank you for your patience.

My Locations

When **My Locations** is selected it will expand to show all merchant accounts registered your Harbortouch Online account. Selecting one will navigate to the **Overview** page for that location.

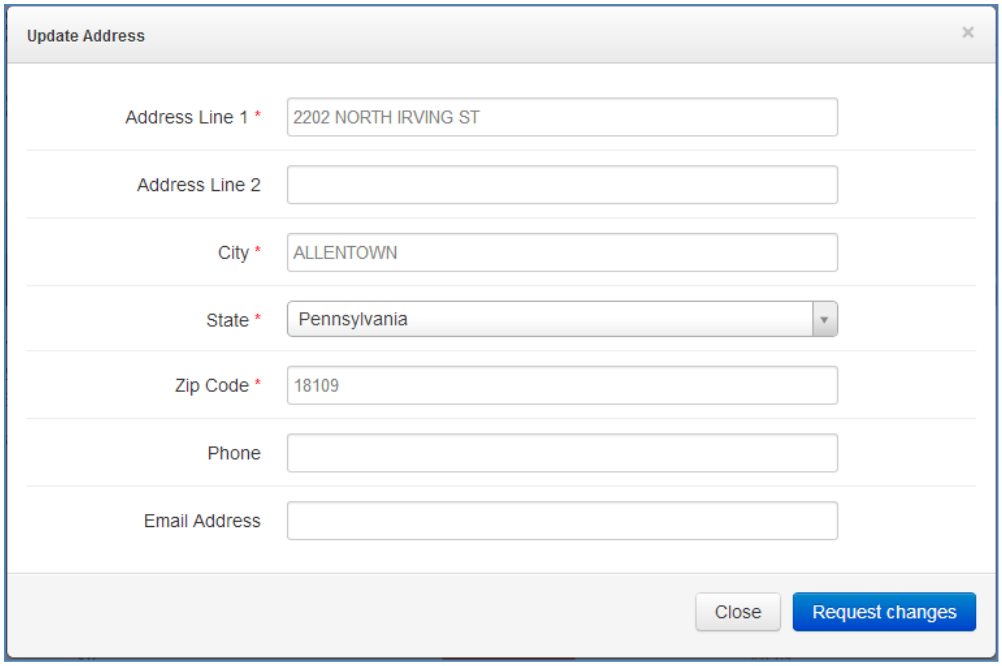
Overview

This page shows a brief overview of the selected merchant account. In the upper right is the connection **Status** Indicator **(1)**. This icon displays either Online or Offline followed by a time/date value for the last contact attempted with the POS system. Below that is the **Data Synchronization Progress** bar **(2).** This displays the percentage of data that is shared between the POS system and Harbortouch Online. If the percentage is below 100%, there have been changes made to either the POS, or to Harbortouch Online, which have not been replicated yet. If you are using Harbortouch Online to run reports, you will want to wait until this bar reads 100% before proceeding or you may be referencing outdated data.



Beneath the Status indicator is the navigation bar **(3).** This allows you to access the other **My Location** functions. The first item on the navigation bar is **Overview**. Select this option from any **My Location** section to return to this page.

Beneath the navigation bar, the page displays the **Contact Information & Location** (address, phone number, and email address) for the business **(4)**. If you need to make changes to this information you can do so through the **Edit** link next to the section header.



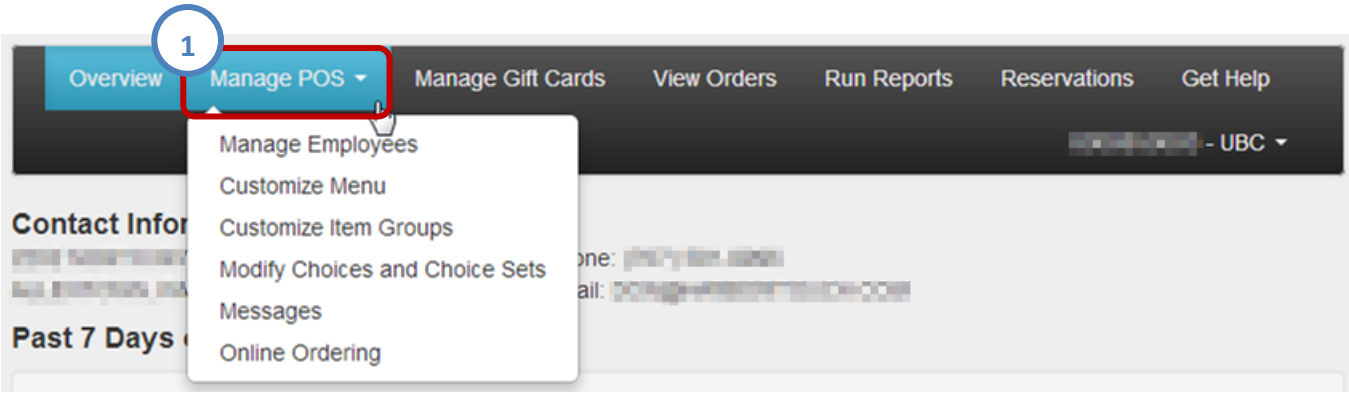
Make any changes to the information displayed in the Update Address window and press the **Request Changes** button to send the requested changes to Harbortouch.

Any changes to the legal business information needs to be reviewed by Harbortouch and will not take effect immediately upon submission.

The remainder of the page displays a summary of recent batch totals, currently open tickets and associated dollar value, as well as any closed tickets and their associated value.

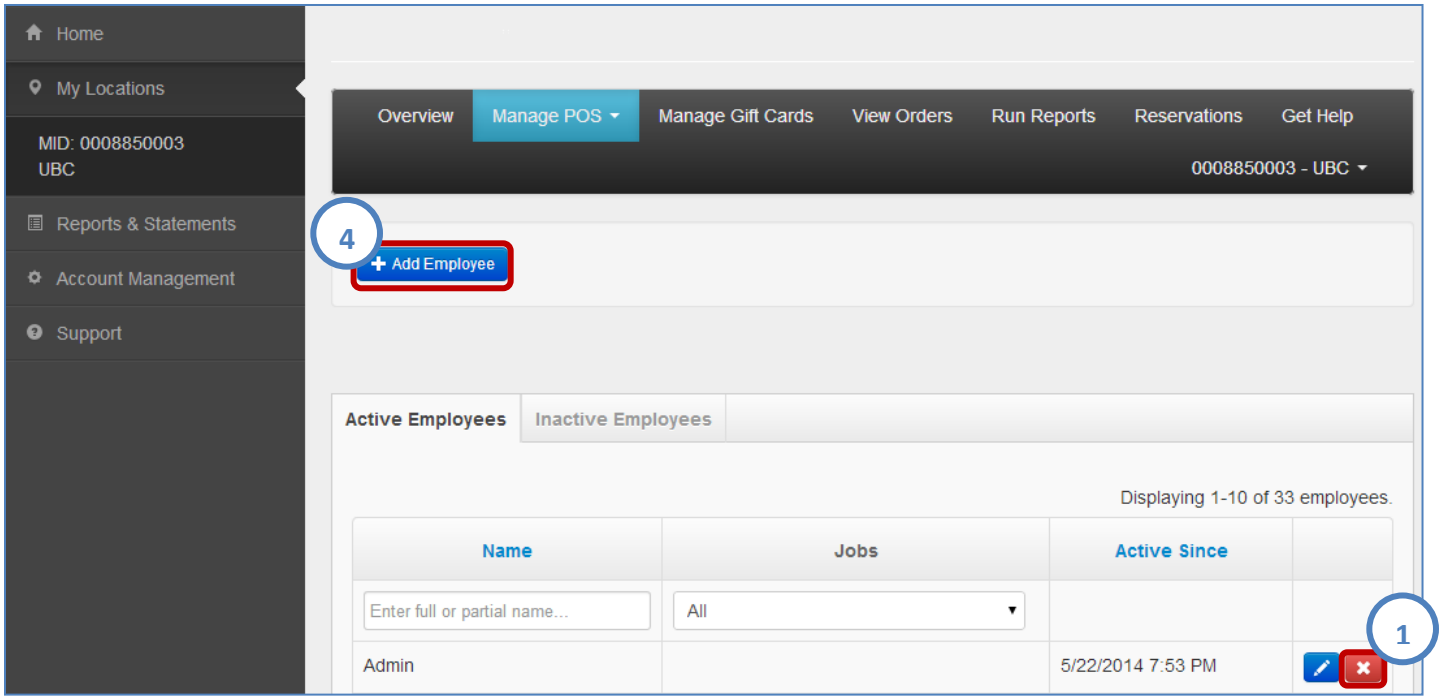
Manage POS

The second option on the **My Locations** navigation bar, **Manage POS (1)**, has no page of its own. It is a drop down which gives you access to several subpages from which you can make changes to (i.e. manage) the POS system at the currently selected location.

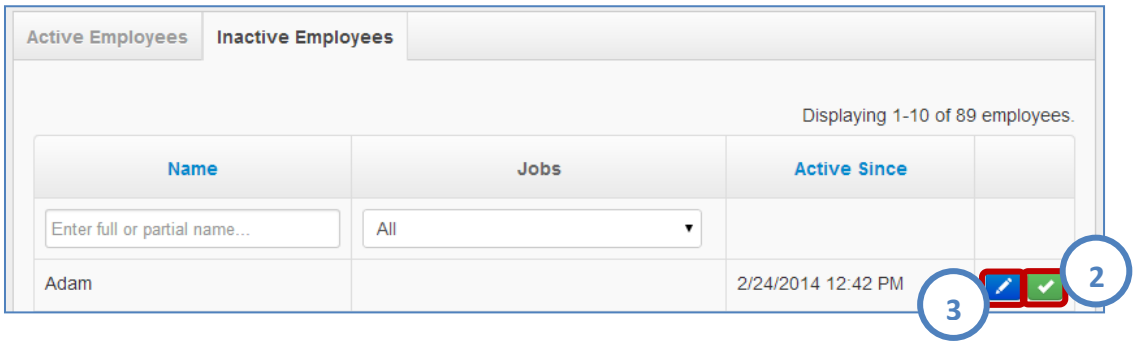


Manage Employees:

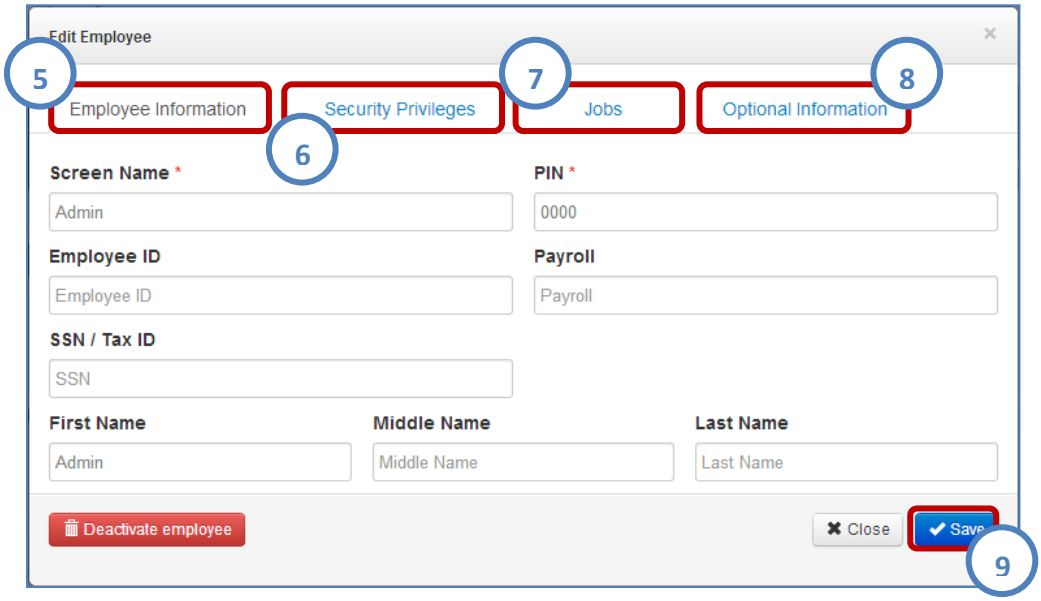
The Manage Employees page is split into two sections, **Active Employees** and **Inactive Employees**.



Both sections provide the same set of options with one distinct difference. In the **Active Employees** section, each employee has a red X **(1)** next to its entry that allows you to deactivate it. In the **Inactive Employees** section, each employee has a green check mark **(2)** next to its entry that allows you to reactivate it.



Next to these buttons is a blue pencil shaped icon **(3)**. This is the edit button. Clicking it brings up a new screen that allows you to make changes to each employee. This screen is broken out into four sections.



Employee Information (5) – Make changes to the employees Screen Name, Entry PIN, Employee ID, Payroll, SSN, and Name.

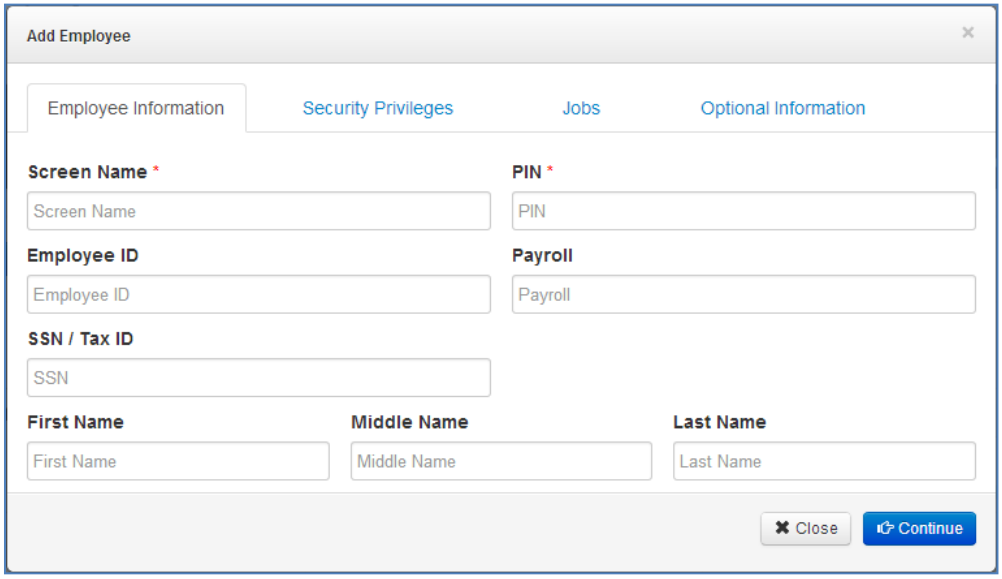
Security Privileges (6) – Make changes to the employee's permissions for the POS system.

Jobs (7) – Make changes to the jobs available to this employee.

Optional Information (8) – Make changes to the employees address, phone number, email address, and personal dates.

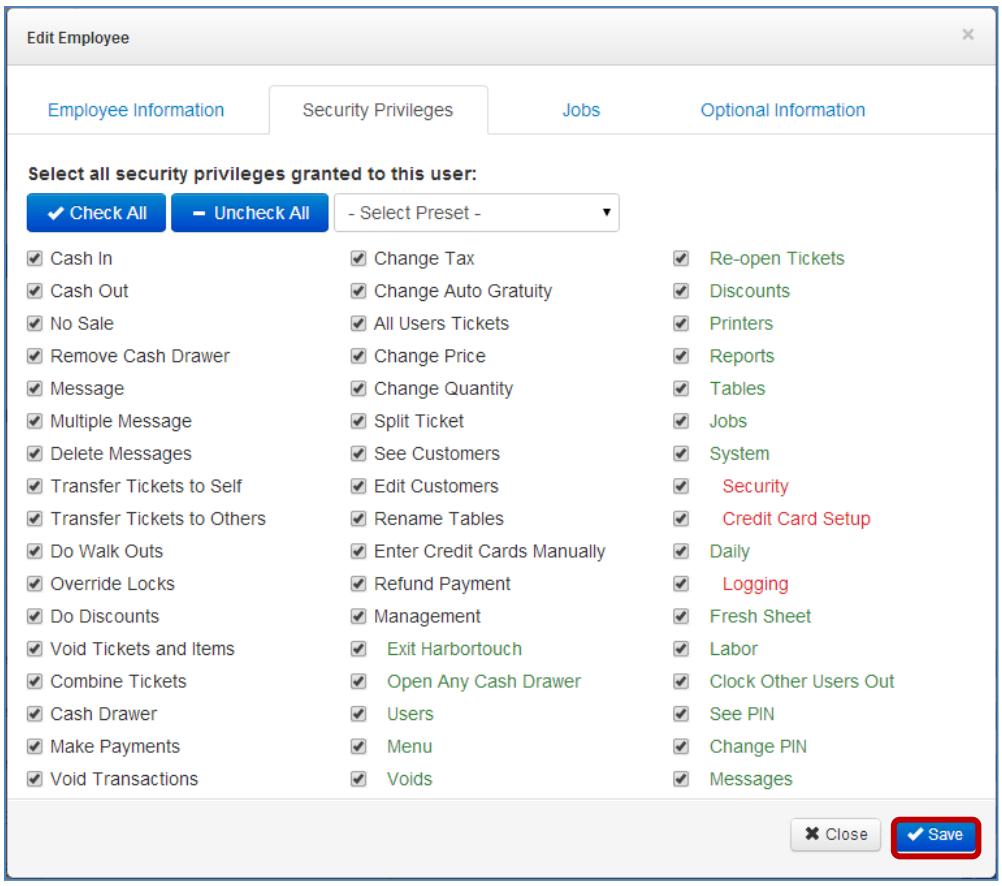
Once all the changes have been made, press the **Save (9)** button to commit them to the POS system.

In order to add a new employee, click the **Add Employee (4)** button in the upper left of the **Manage Employees** page. This will bring up the same screen that was displayed when editing an employee only, now, there will not be any information yet filled in.

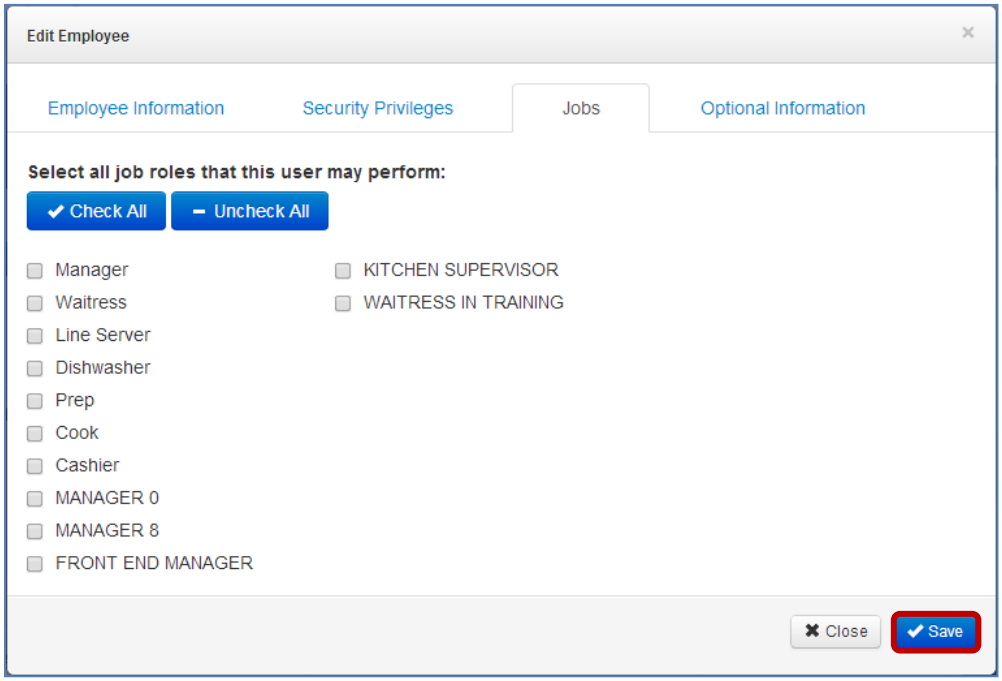


Starting on the **Employee Information** tab, you will need to enter a **Screen Name** and **PIN**. All other information on this tab is optional.

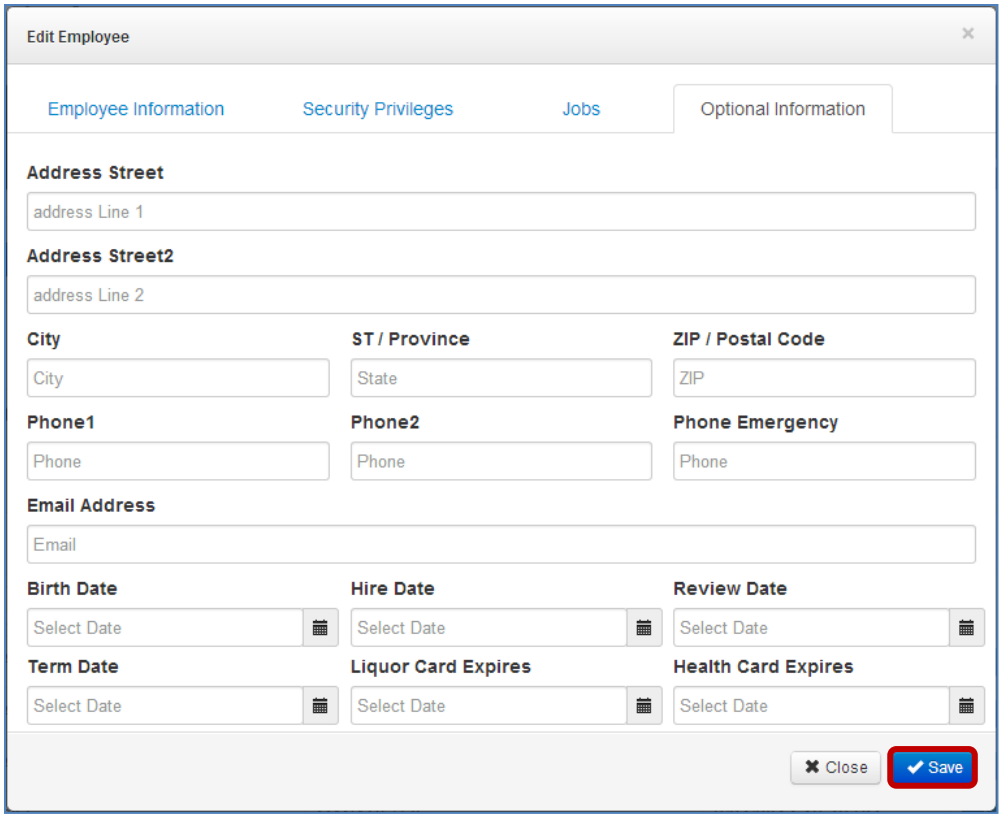
On the **Security Privileges** tab, you will need to check off any function the new employee will need access to on the POS system.



On the **Jobs** tab, check all jobs that the employee will be performing at the merchant location.



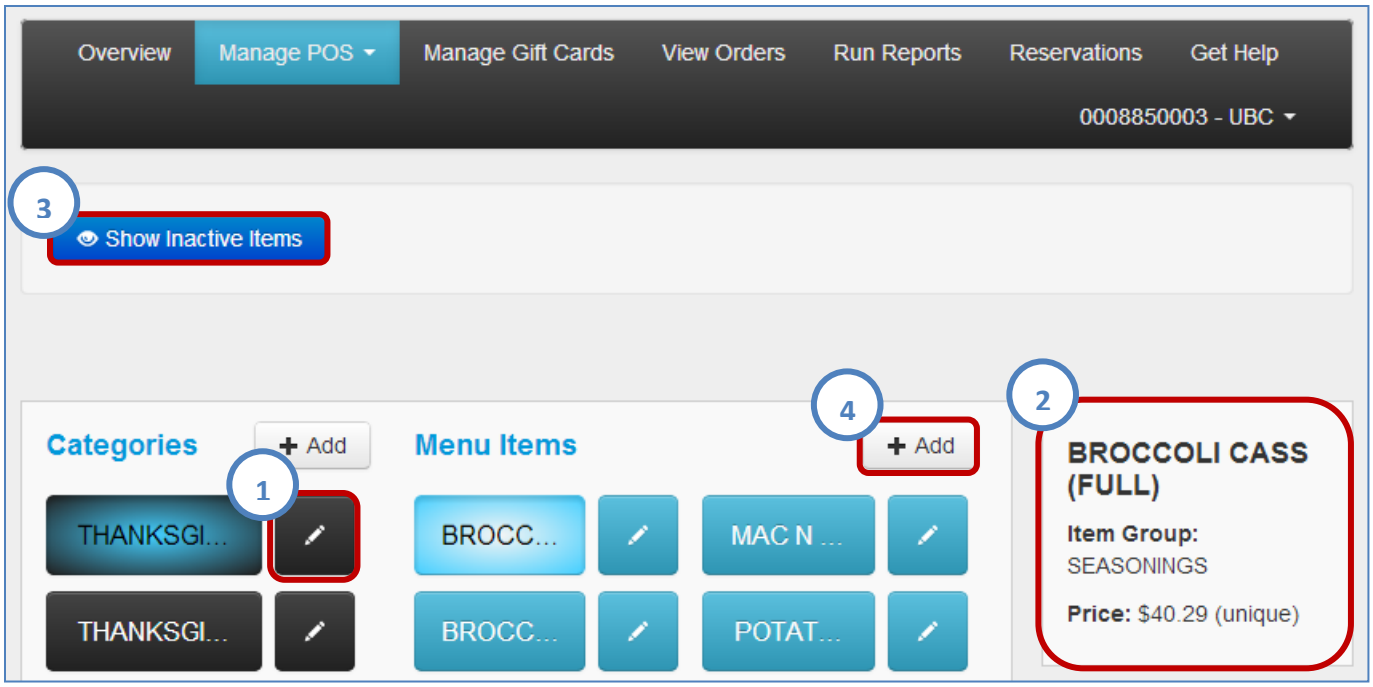
The **Optional Information** tab, as the name implies, is entirely optional. This information is purely for your reference purposes.



Throughout this process you will be informed if any information is missing, incorrect, or, in the case of PIN, already in use. One you have entered all the information for the new employee, press the **Save** button.

Customize Menu:

This section displays the **Screen Categories** and **Menu Items** arranged as they would show natively on the POS system. **Screen Categories** on the left with **Menu Items** within that category on the right. Next to each item is a button with an image of a pencil on it. This is the edit icon **(1)**.

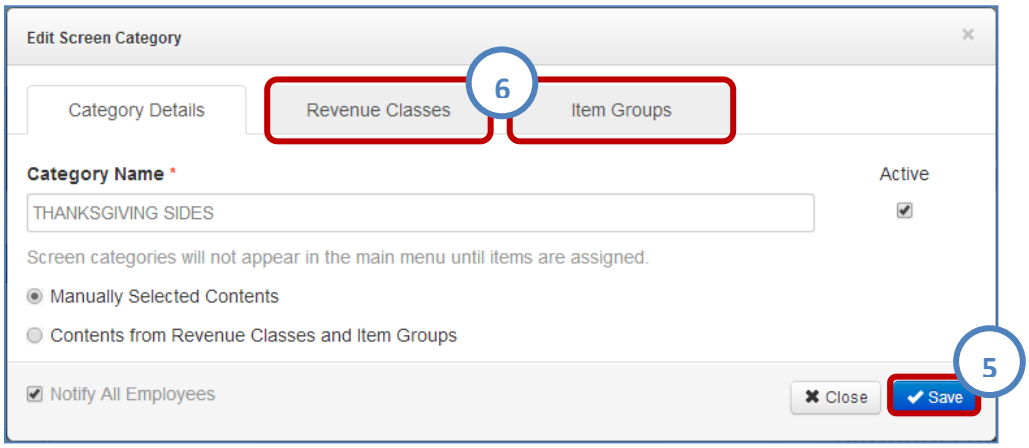


Pressing the edit icon will allow you to choose from the same options that are available in the POS system when making changes to an item.

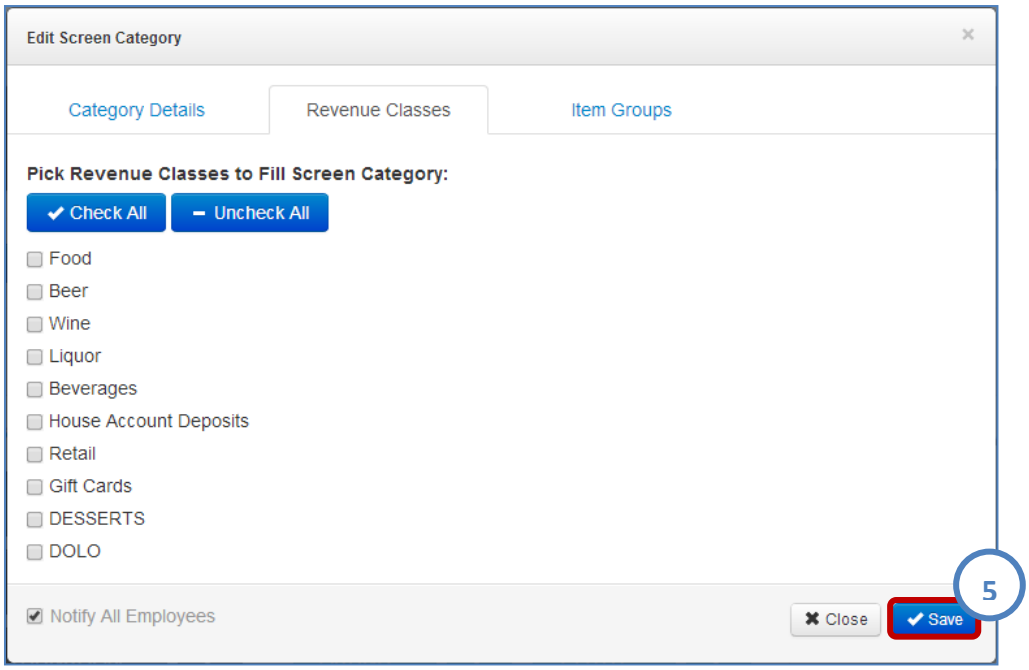
To the right of the categories and items is a details pane **(2)** that displays a brief summary of the selected item. This summary includes the Item Name, Item Group, and Item Price.

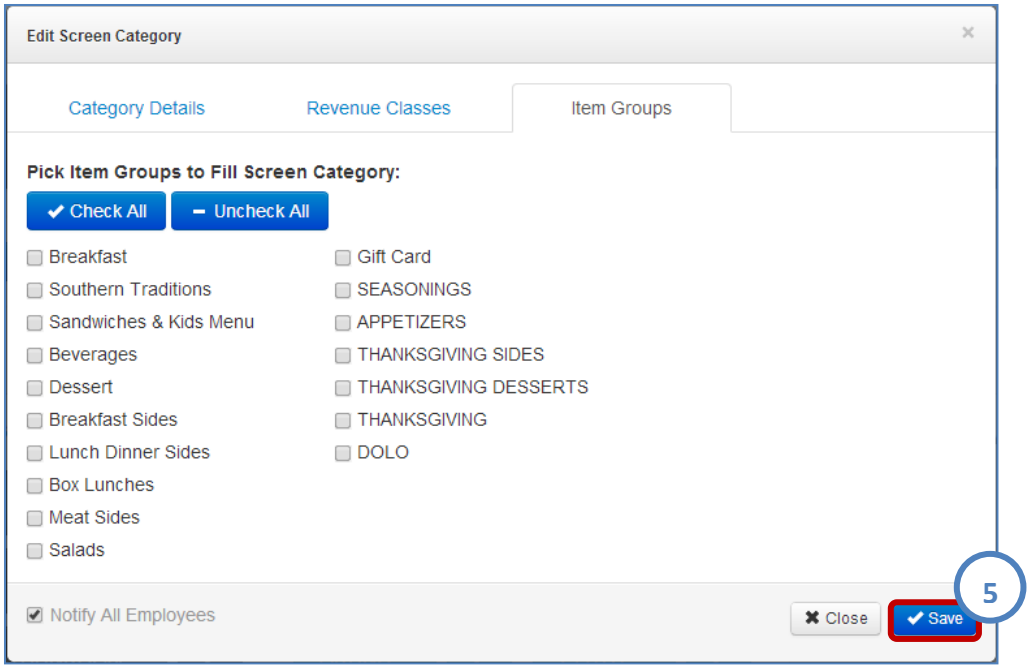
In the top left of the page is a button labeled **Show Inactive Items (3)**. Pressing this button will add any inactive Screen Categories and Menu Items to the list in white. Afterwards the button will say **Hide Inactive Items**. Pressing it will remove the inactive items from the list.

To create a new Screen Category or Menu Item, press the **Add (4)** button next to their respective headers, fill out the required information, and press the Save button to commit the item to the system.



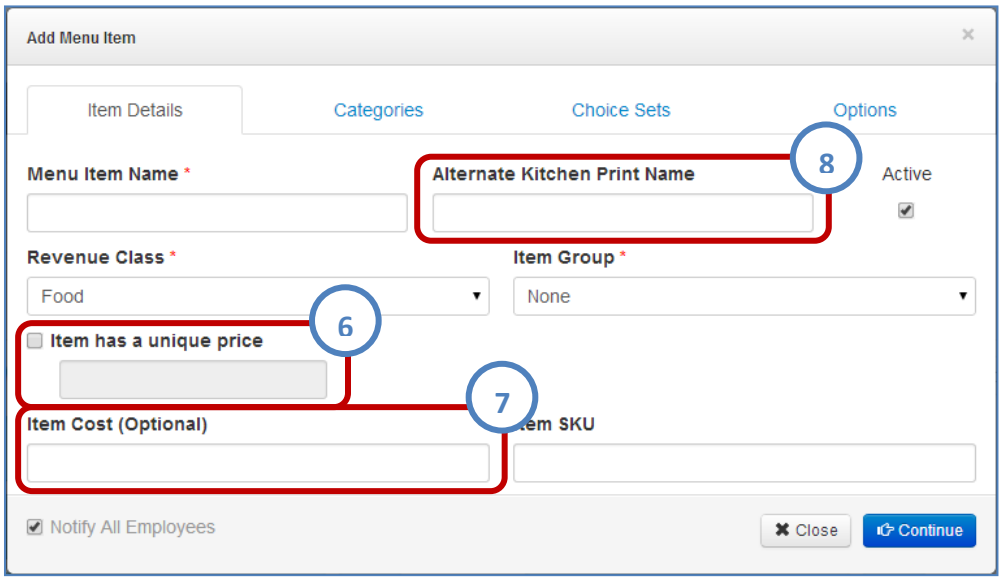
In the case of a Screen Category, you will need to enter a name and choose either **Manually Selected Contents** (Items are entered into this category by selecting it from item add/edit) or **Contents from Revenue Classes and Item Groups** (Items with the chosen Revenue Class(s) or Item Group(s) will display in this category). If you chose **Manually Selected Contents**, you are finished with the **Screen Category** and can press the **Save (5)** button to commit it to the POS system. If not, you will need to make at least one selection from either of the remaining tabs, **Revenue Classes** and **Item Groups (6)**, both of which are lists containing their namesakes.



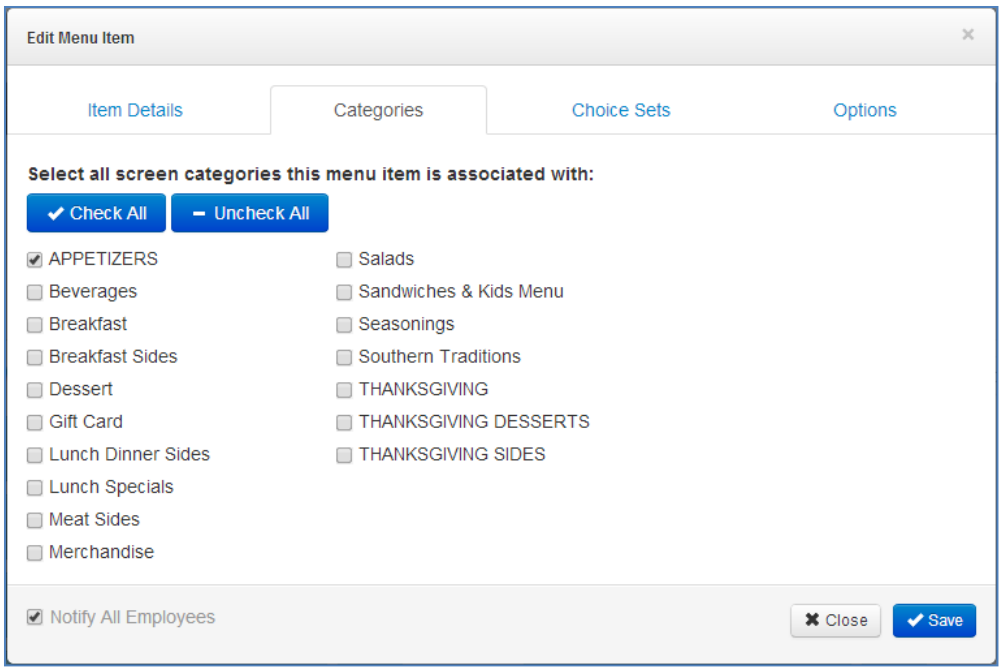


Check off which ones you would like to include in the new **Screen Category** and press the **Save (5)** button.

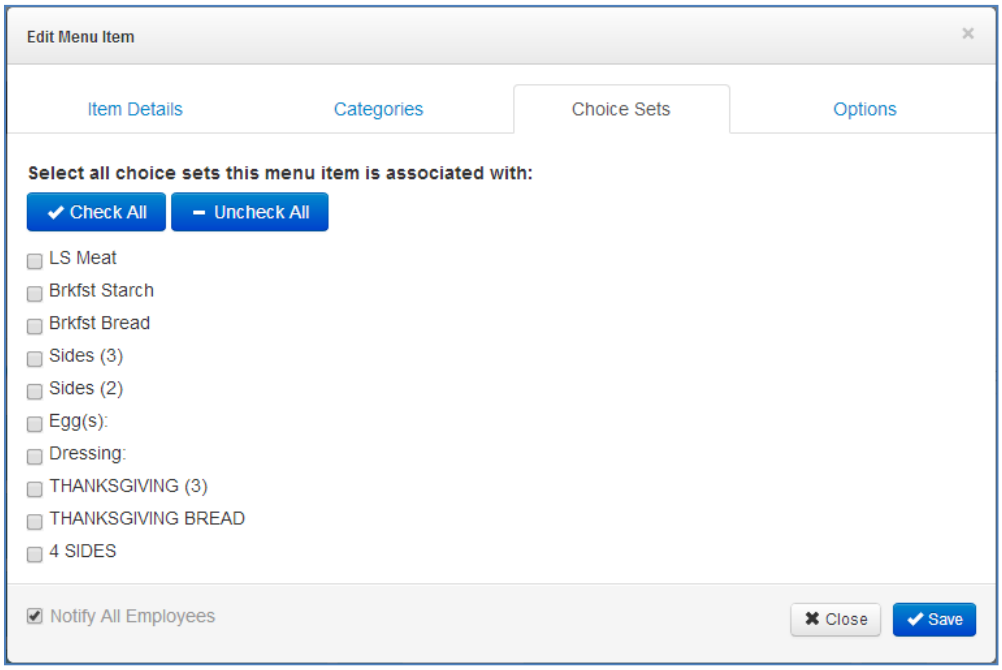
In the case of a **Menu Item**, you will need to enter a **Menu Item Name** and choose a **Revenue Class** as well as an **Item Group**. All other options are not technically required, however, depending on how you have setup your **Item Groups**, it may not have a price and, depending on how you have setup your **Screen Categories**, it may not appear on the menu at all. Once you have made all intended selections, press the **Save** button on any of the four tabs to commit the item to the POS system.



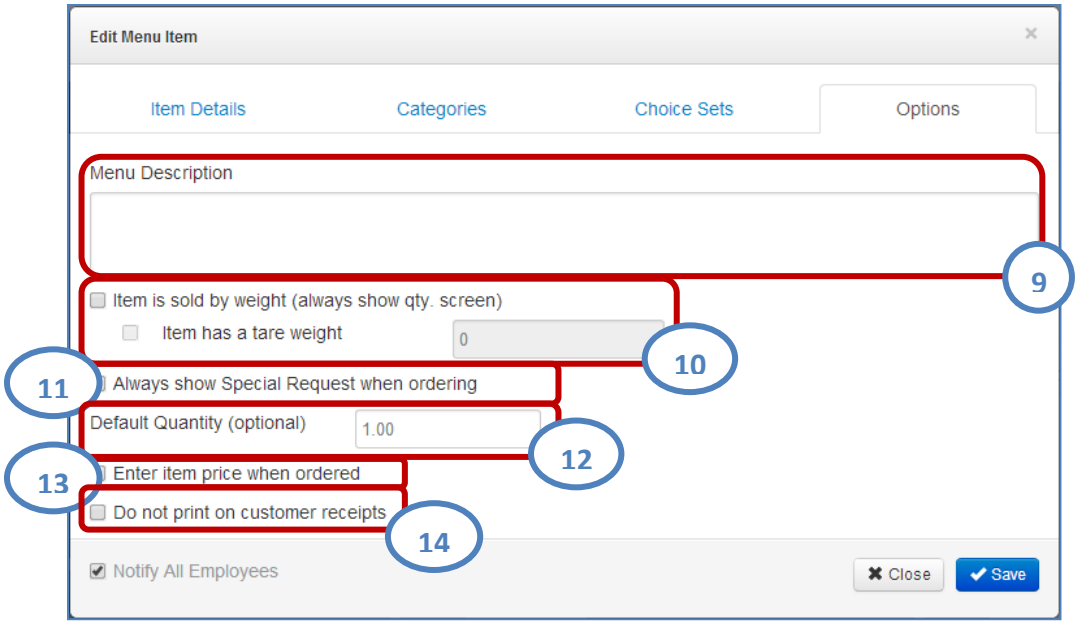
6. Check the box and enter a dollar value to add a price to this item. If the selected **Item Group** has a default price, this box will already have a value in it.
7. Enter the cost, to your business, of the item.
8. The text entered here will show on kitchen prints in place of the **Menu Item Name**.



From the **Categories** tab, check off any **Screen Categories** that this item should appear under on the menu.

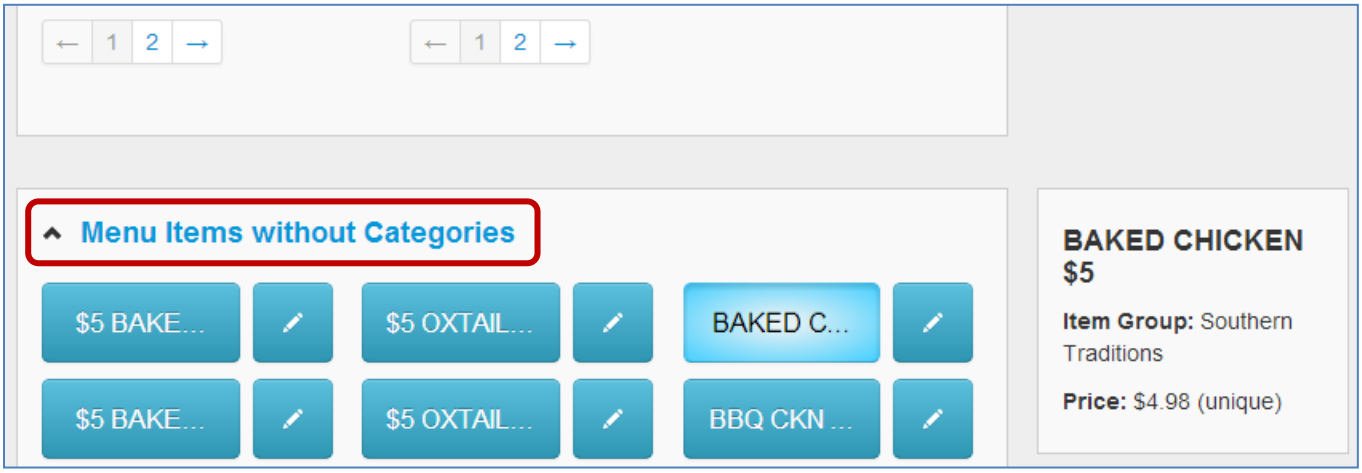


From the **Choice Sets** tab, check off any **Choice Sets** that will be available on this item at the time of sale.



9. Enter a description for the item (Purely for your own records).
10. Select this option if you item is priced and sold per weighted unit.
11. Select this option if you want the **Special Request** prompt to display each time this item is sold.
12. Enter a value into this field if the item is sold in some quantity other that one unit.
13. Select this option if you want to enter the price of the item at the time of sale.
14. Select this option if you do not want this item to display on the printed receipt.

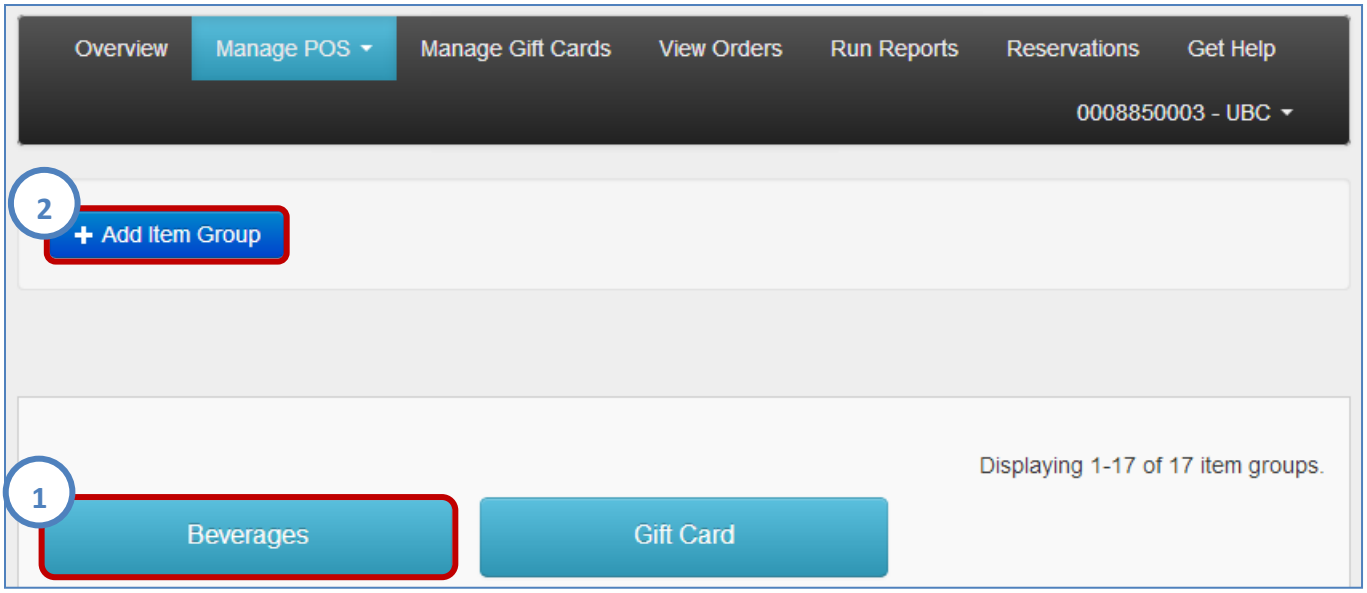
Beneath the Categories and Menu Items, is a heading labeled **Menu Items without Categories**. Pressing it will expand a separate listing of items that are not currently assigned to a Screen Category.



Pressing it again will collapse the items once more.

Customize Item Groups:

This section displays a list of all the Item Groups in the POS system.

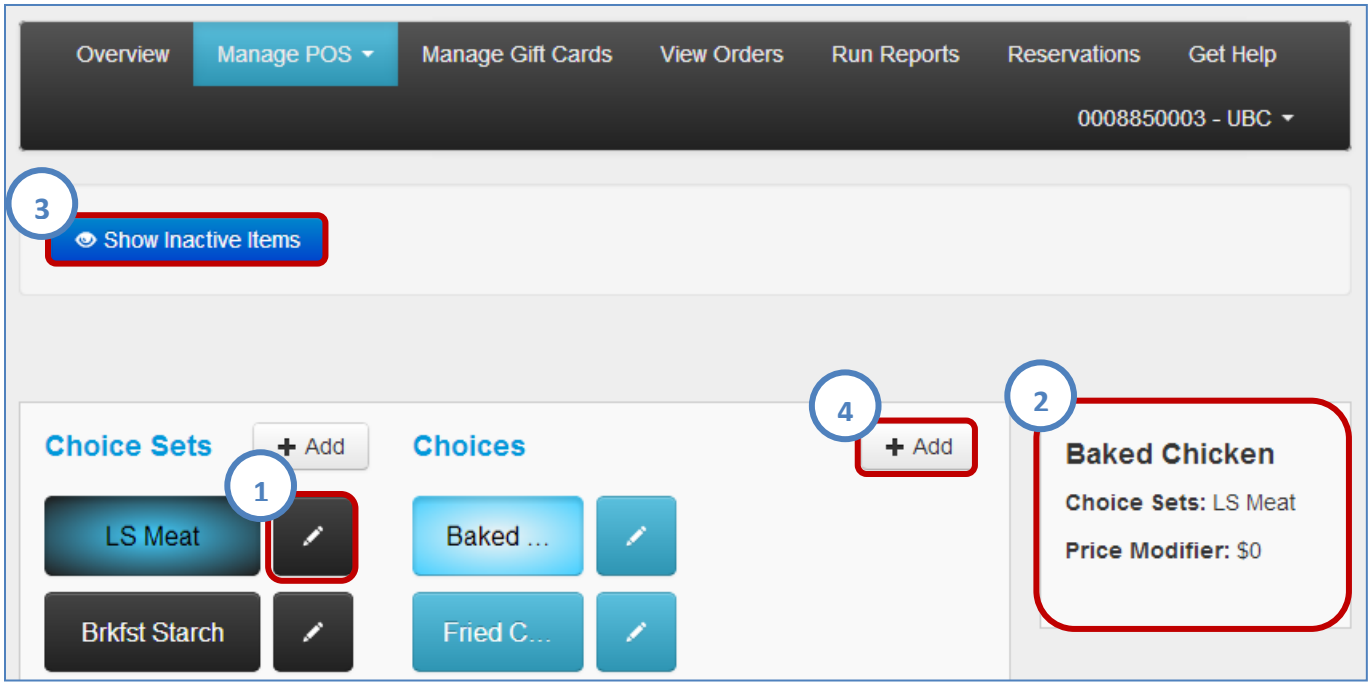


Clicking one of them **(1)** gives you the option to change the **Item Group Name** and **Default Item Price** of the selected **Item Group**. Make changes to one or both options and press the **Save (3)** button.

To create a new Item Group, press the **Add Item Group (2)** button at the top of the page. In the Add Item Group window, enter an **Item Group Name** and **Default Item Price**, and press the **Save (3)** button to commit the Item Group to the system.

Modify Choices and Choice Sets:

This section displays the **Choice Sets** and **Choices** as they would show natively on the POS system. **Choice Sets** on the left in black with **Choices** within that set on the right in blue. Next to each item is a button with an image of a pencil on it. This is the edit icon **(1)**.



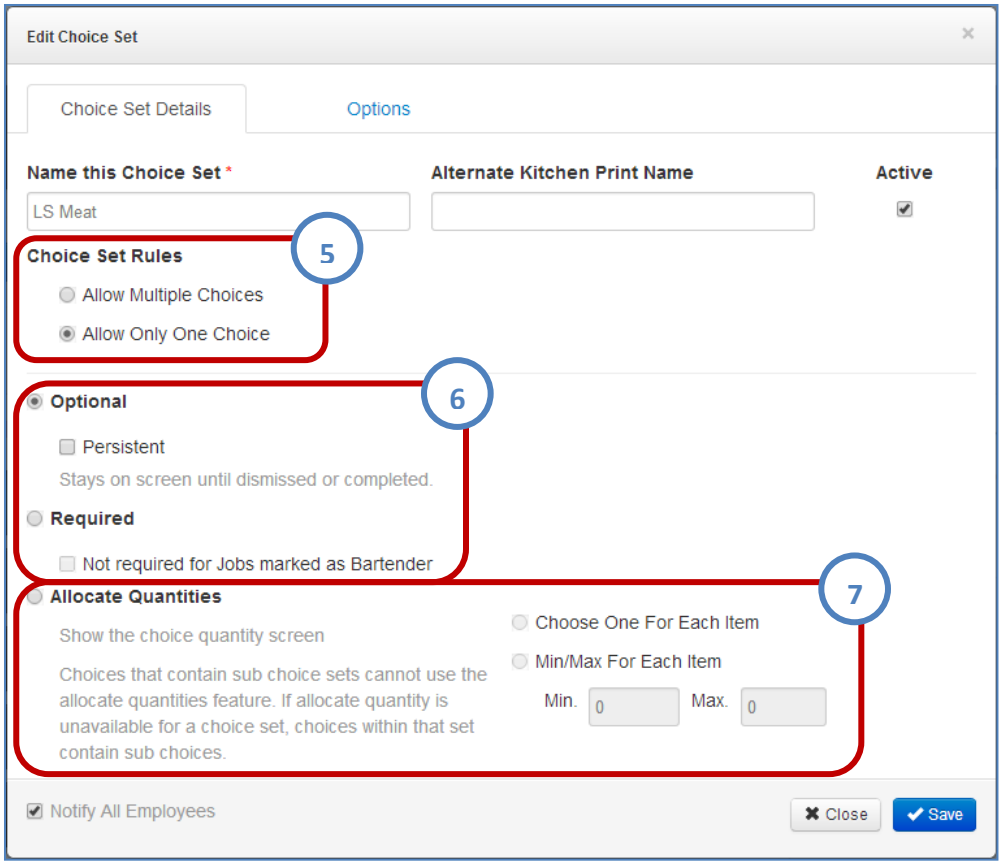
Pressing the edit icon will allow you to choose from the same options available in the POS system when editing these items.

To the right of the choices and sets is a details pane **(2)** that displays a brief summary of the selected choice. This summary includes the **Choice Name**, **Choice Set**, and **Price Modifier**.

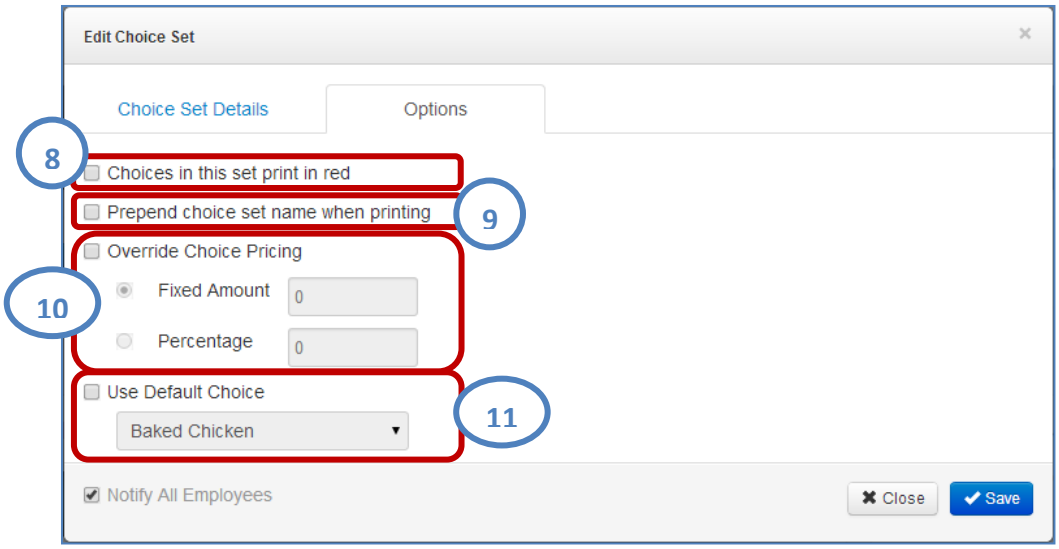
In the top left of the page is a button labeled **Show Inactive Items (3)**. Pressing this button will add any inactive **Choice Sets** and **Choices** to the list in white. Afterwards the button will say **Hide Inactive Items**. Pressing it will remove the inactive items from the list.

To create a new **Choice Set** or **Choice**, press the **Add (4)** button next to their respective headers, fill out the required information, and press the **Save** button to commit the item to the POS system.

In the case of a Choice Set, you will need to, at least, provide a name for the set. All other options are technically not required and can be left in their default state, however, these control the behavior of the set and may need to be changed depending on its intended purpose. If not you may press the **Save** button at this time to commit the **Choice Set**.



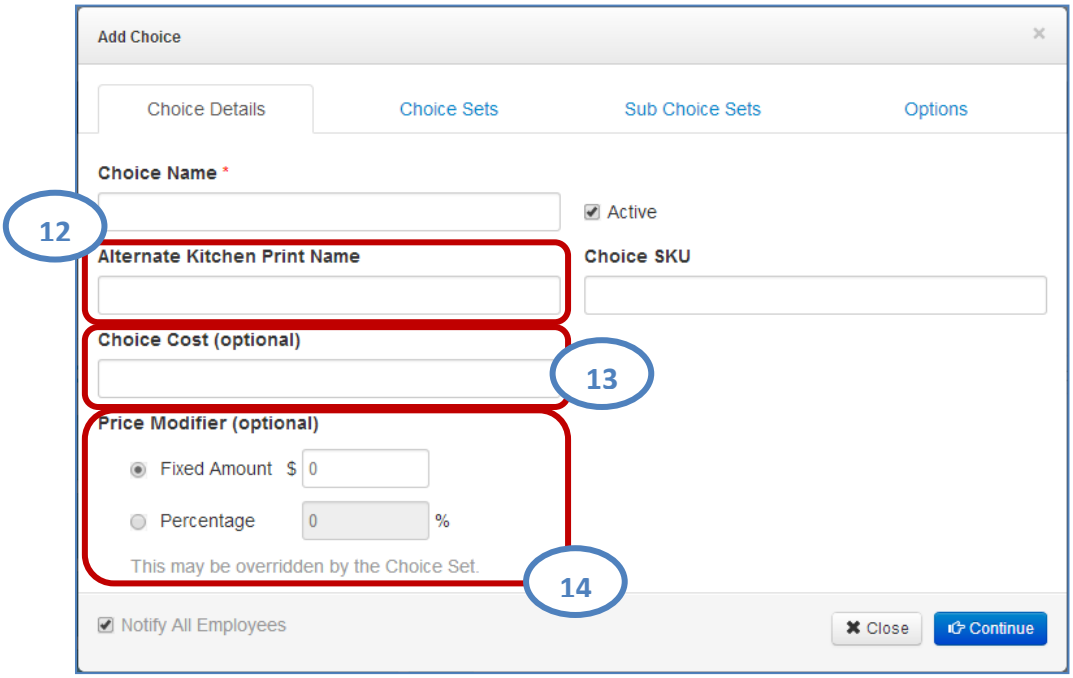
5. **Allow Only One** (a single choice from this set may be chosen at the time of sale) or **Allow Multiple** (Up to one of each choice from this set may be chosen at the time of sale).
6. **Optional** (You do not need to select a choice from this set may be chosen at the time of sale) or **Required** (You must select a choice from this set may be chosen at the time of sale).
7. **Choose One For Each** (Same as Allow Multiple from **Choice Set Rules** but with a different screen) or **Min/Max For Each** (Set a minimum number of choices that must be selected and a maximum number of choices that can be selected).



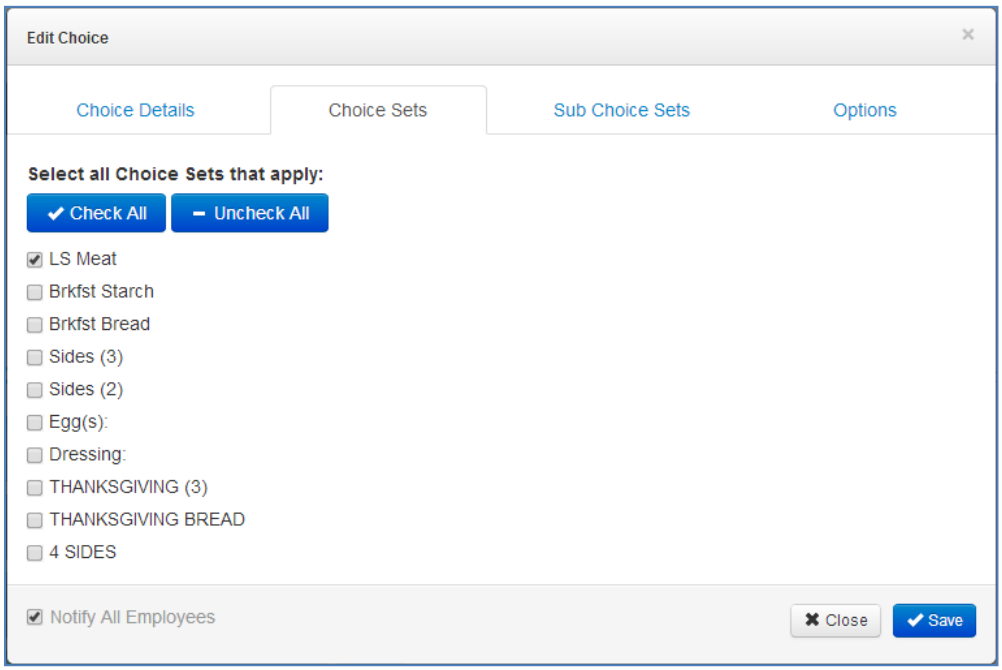
8. If you are using a dot matrix printer for kitchen receipts, the choices in this set will print in red ink.
9. Choices in this set will be prefaced with the set name on receipts (Ex. Ice Cream – Double Fudge).

10. Replace the price associated with all choices in a set with either a set dollar amount or a percentage of the item price that the choice is attached to.
11. Select one of the choices in the set to be the choice that will be automatically selected in the event one is not chosen manually.

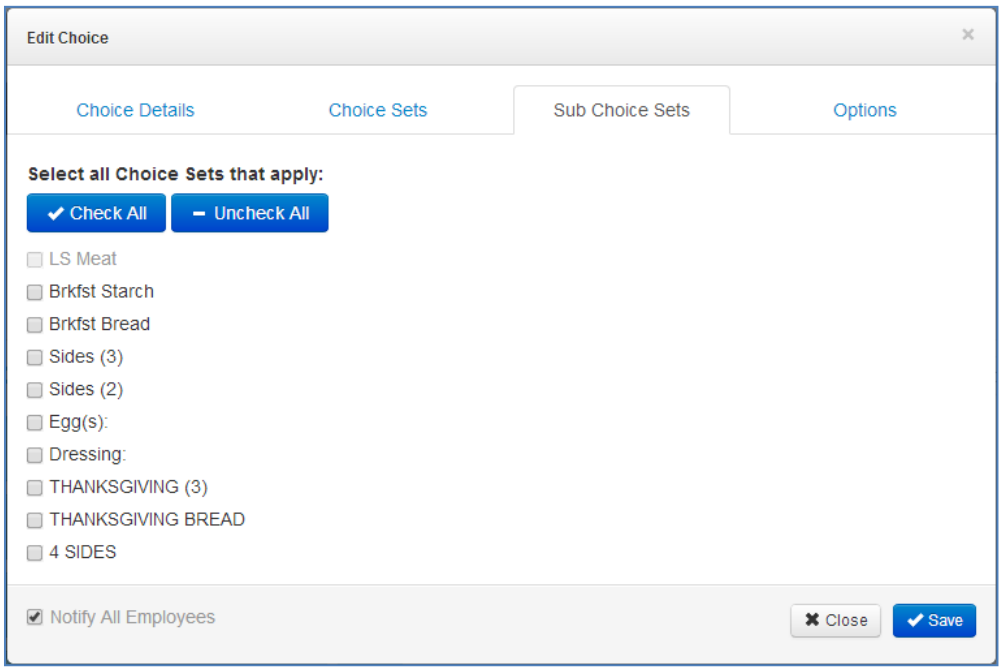
In the case of a choice, you will need to, at least, provide a name for the set. All other options are technically not required and can be left in their default state, however, you need to select at least one **Choice Set** to start using the choice. If you have not yet created the **Choice Set,** you may press the **Save** button at this time to commit the **Choice**.



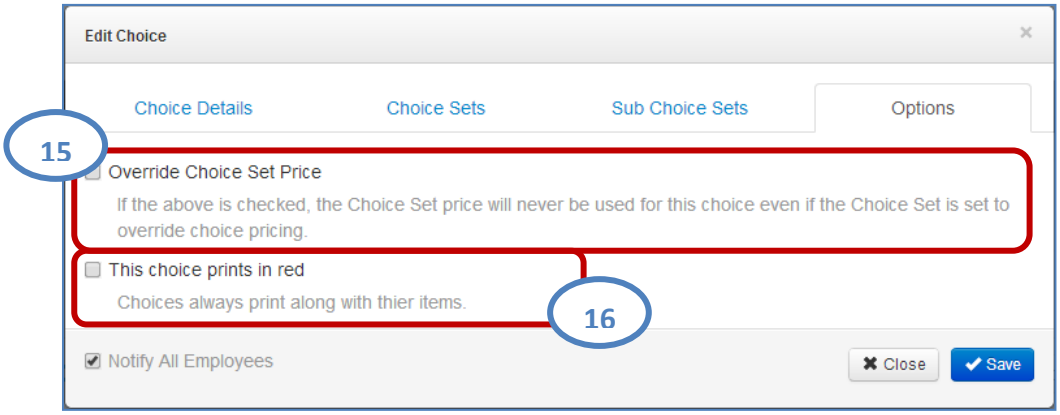
12. The text entered here will show on kitchen prints in place of the Choice Name.
13. Cost, to you, of the choice.
14. Price, to the customer, of the choice. **Fixed Amount** (Dollar Value) or **Percentage** (of the Item Price).



From the **Choice Sets** tab, check off any **Choice Sets** that this **Choice** will be included in.

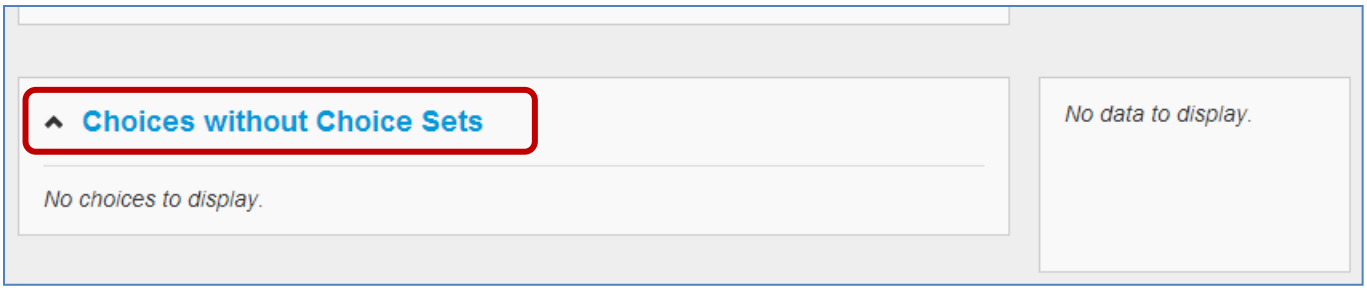


From the **Sub Choice Sets** tab, check off any **Choice Sets** that will be activated as a result of selecting this **Choice** at the time of sale.



15. **Choice Set** price override will not affect the price of this **Choice**.
16. If you have a dot matrix kitchen printer, this **Choice** will print in red ink.

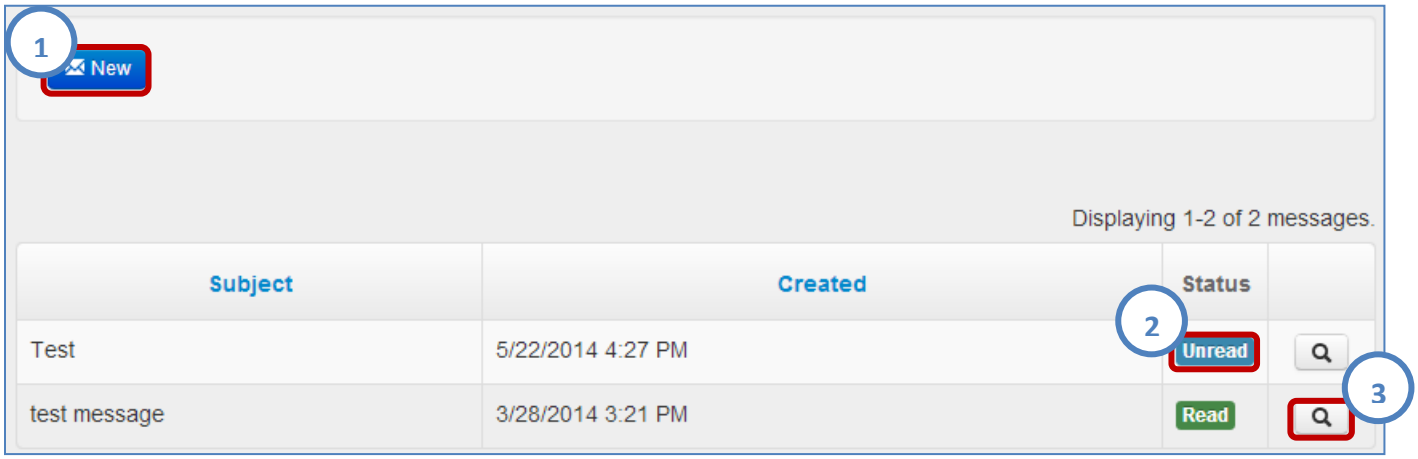
Beneath the Choice Sets and Choices, is a heading labeled **Choices without Choice Sets**. Pressing it will expand a separate listing of all choices that are not assigned to a Choice Set.



Pressing it again will collapse the choices once more.

Messages:

This section allows you to send messages to one or more employees of the business through Harbortouch Online to the POS system by pressing the **New (1)** button.



Once sent, recipient will receive a notification on the POS system that there is a message waiting to be read. They can access the message by clicking on the Harbortouch Online toolbar and selecting Messages.

From Harbortouch Online, you can see all messages that have been sent and whether or not they have been views by the recipient(s). This is indicated with a **Status (2)** icon that shows either Read or Unread. You can also view the message yourself by pressing the magnifying glass icon **(3)** to the right of each message.

Online Ordering:

Selecting **Online Ordering** from the drop down will open a new browser window to the Harbortouch Online Ordering Site.

For assistance with Harbortouch Online Ordering please see the Harbortouch Online Ordering – Users Manual (Manual is not yet released).

Manage Gift Cards

Selecting **Manage Gift Cards** from the navigation bar will open a new browser window to the Harbortouch Gift Card Customization Wizard.

After you have completed the Gift Card Customization Wizard, returning to this page will allow you to order additional gift cards.

View Orders

This section displays any equipment orders that have been placed for this merchant account. This page will display the status of any shipment coming from Harbortouch including the original system order, additional terminals or accessories, and any equipment swaps.

Run Reports

Selecting **Run Reports** from the Navigation Bar will navigate you to the Hospitality Financial Overview page, under Reports & Statements, pre-set to the merchant account you are currently viewing.

To learn more about the Hospitality Financial Overview, skip ahead to the Reports & Statements section.

Reservations

Selecting **Reservations** from the Navigation Bar will open a new browser window to the Harbortouch Reservations Site.

For assistance with Harbortouch Reservations please see the Harbortouch Reservations – Users Manual.

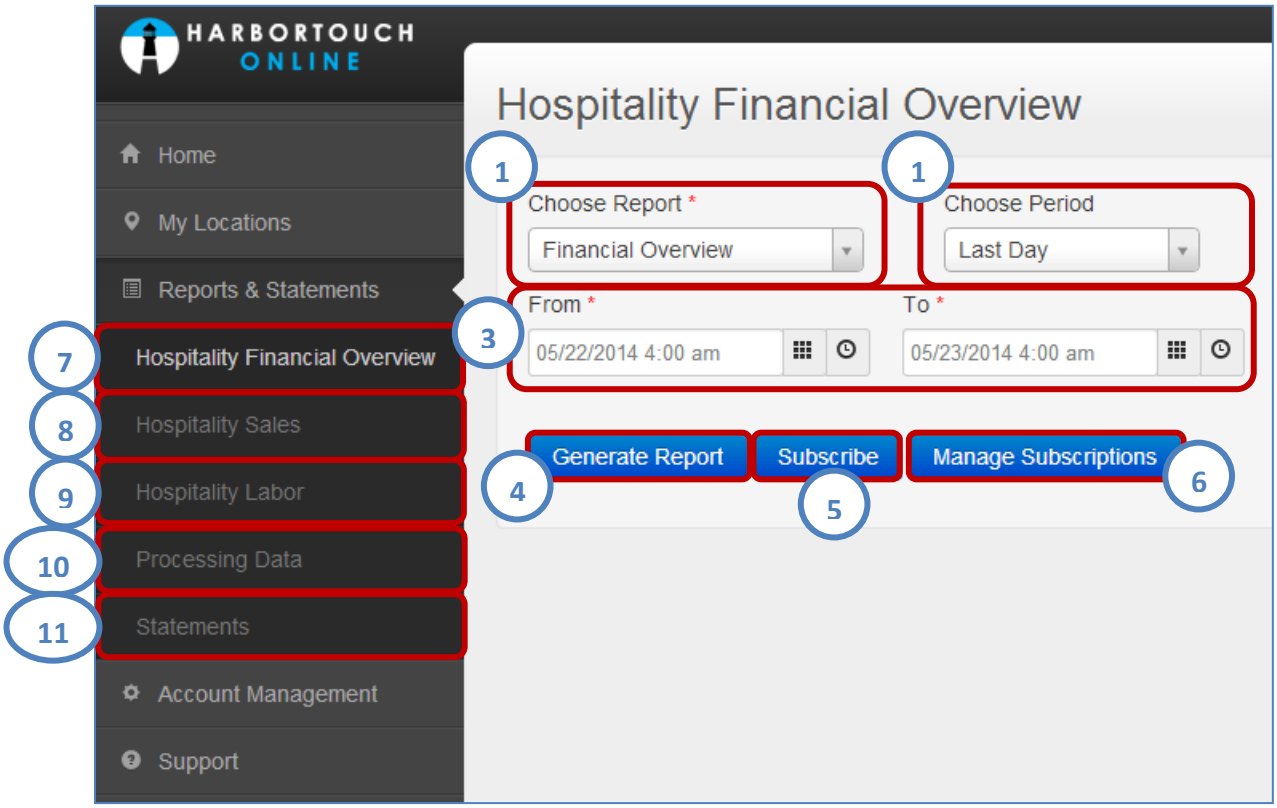
Get Help

Selecting **Get Help** from the Navigation Bar will open a new browser window to the Harbortouch Knowledge Base. From this site you will be able to search for a solution to any problem you may be having, or you can open a chat to a Harbortouch Technical Support representative for assistance.

Reports & Statements

All of the sections under Reports & Statements share several common control elements.

In the header of each section are the options for choosing and modifying the displayed report.



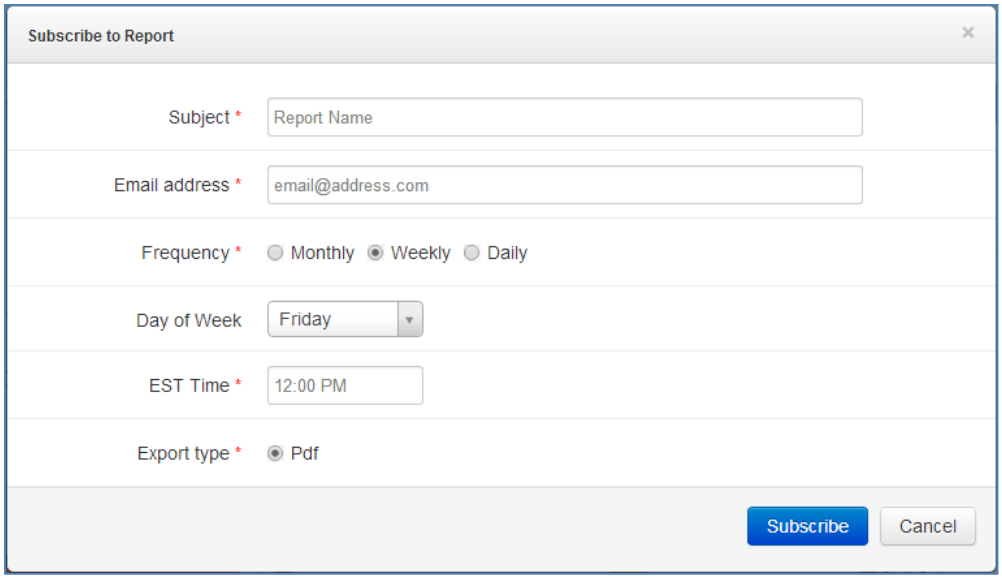
Choose Report (1) – This allows you to select the specific report you wish to view.

Choose Period (2) - This allows you to choose a preset period of time for the report.

From / To (3) - This allow you to select custom Start and End date/times for the report (**NOTE:** If you choose a date only, without a time component, it will default the time to the start of the business day. This means that if you set it from 05/01 to 05/02 then it will give you the day of 05/01, not both days).

Generate Report (4) - This refreshes the section with the new options.

In the upper right of the section are two buttons. **Subscribe (5)** and **Manager Subscriptions (6)**. **Subscribe (5)** opens a new window that will allow you to automate the creation and distribution of the currently displayed report.



Using this function you can set reports to be emailed to you at set intervals. Set the parameters in the **Subscribe to Report** window and press the **Subscribe** button.

Manage Subscriptions (6) navigates to the **Report Subscriptions** section under **Account Management**. There you will be able to make changes to or remove any existing subscriptions.

Below the report subscription buttons are the **PDF** and **Print** buttons. Pressing the **PDF** button will download a PDF document of the current report to your computer. Pressing the **Print** button will bring up you local printing options for the current report.

Hospitality Financial Overview

The **Hospitality Financial Overview (7)** is a report that summarizes the restaurant activities for a given time period. It provides a breakdown of Sales Totals, Taxes, Payments, Tips, Discounts and Voids. The information is presented through a series of lists, tables, and graphs (printed, downloaded, and emailed versions will not have graphs).

Hospitality Sales

The **Hospitality Sales (8)** section allows you to view the various Sales reports from the POS system. Not every Sales report from the POS system is currently available in Harbortouch Online. Over time the remaining reports will become available.

Hospitality Labor

The **Hospitality Labor (9)** section allows you to view the various Labor reports from the POS system. Not every Labor report from the POS system is currently available in Harbortouch Online. Over time the remaining reports will become available.

Processing Data

The **Processing Data (10)** section allows you to view reports on the Credit Card Batches, Transaction History, Chargeback History, and Deposit History related to your merchant accounts.

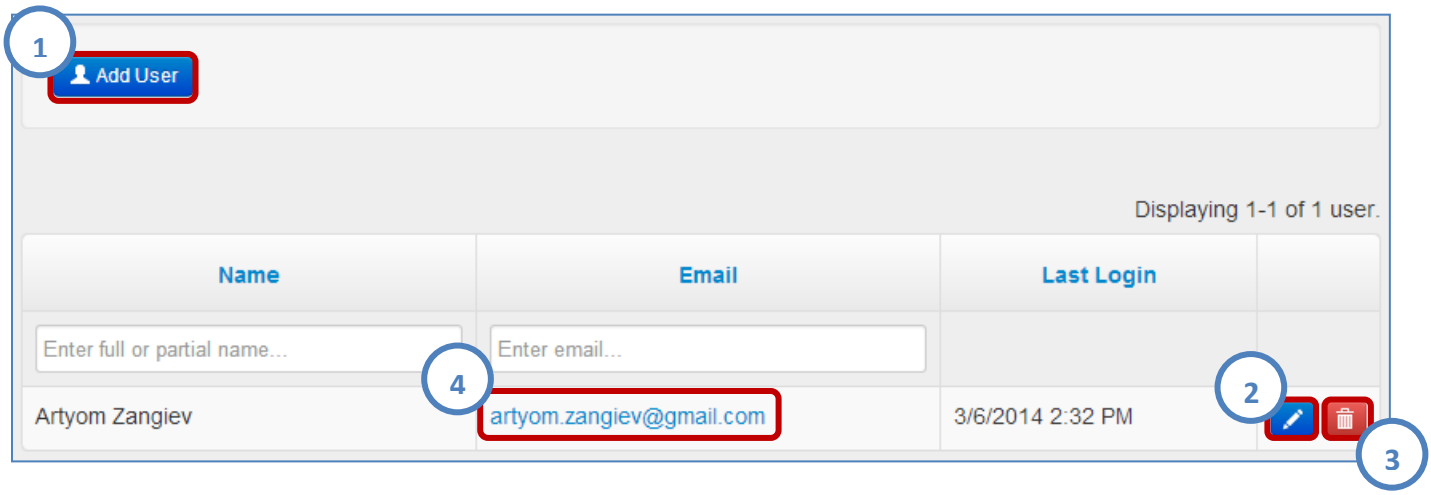
Statements

The **Statements (11)** section allows you to view Merchant Statements sent from Harbortouch.

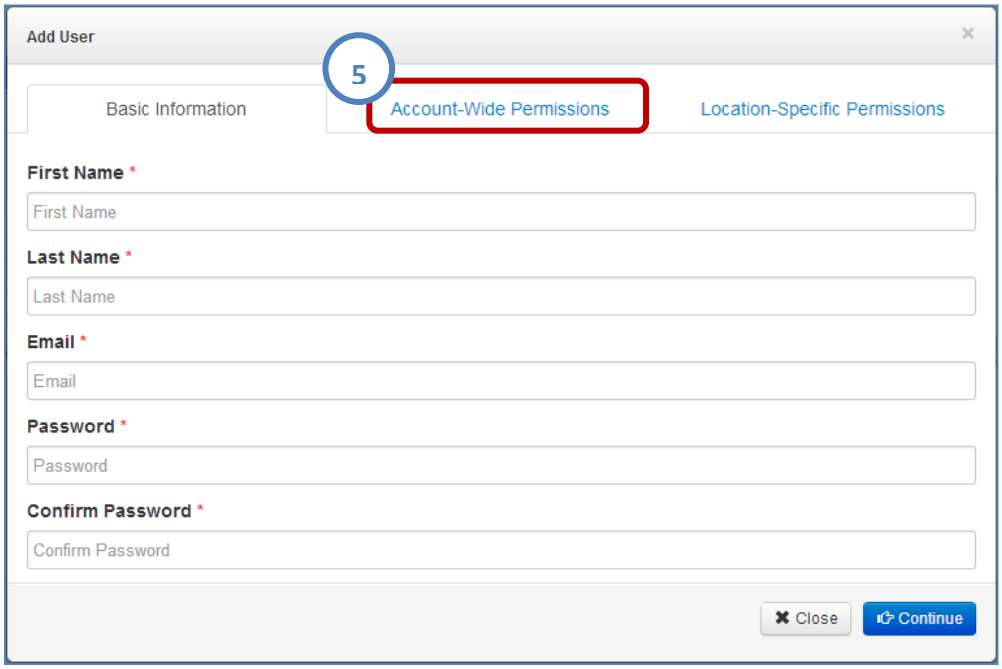
Account Management

Users

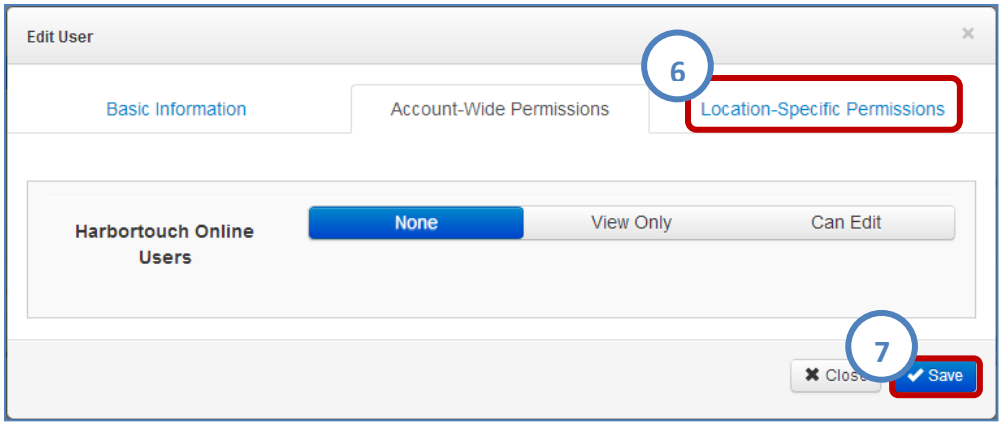
This section allows you to extend access to the Harbortouch Online system to any individual without needing to provide them with your Harbortouch Online login credentials. You can create separate logins using an individual's email address and a custom password. Permissions can be set to restrict what information each user can view and make changes to. Permissions are location specific. If you have multiple merchant accounts, you can create a login that only has access to the locations you specify. You can also edit **(2)** or remove **(3)** existing user accounts.



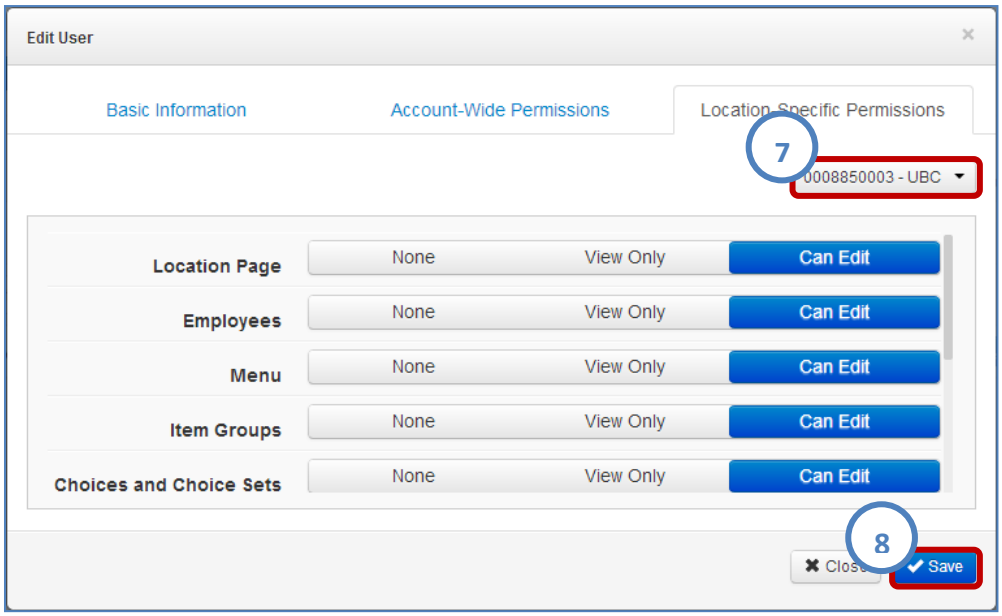
To create a new user account, press the **Add User (1)** button in the upper left.



Enter the new users **Name**, **Email Address**, and **Password**. Enter the password a second time for confirmation then press the **Account-Wide Permissions (5)** tab.



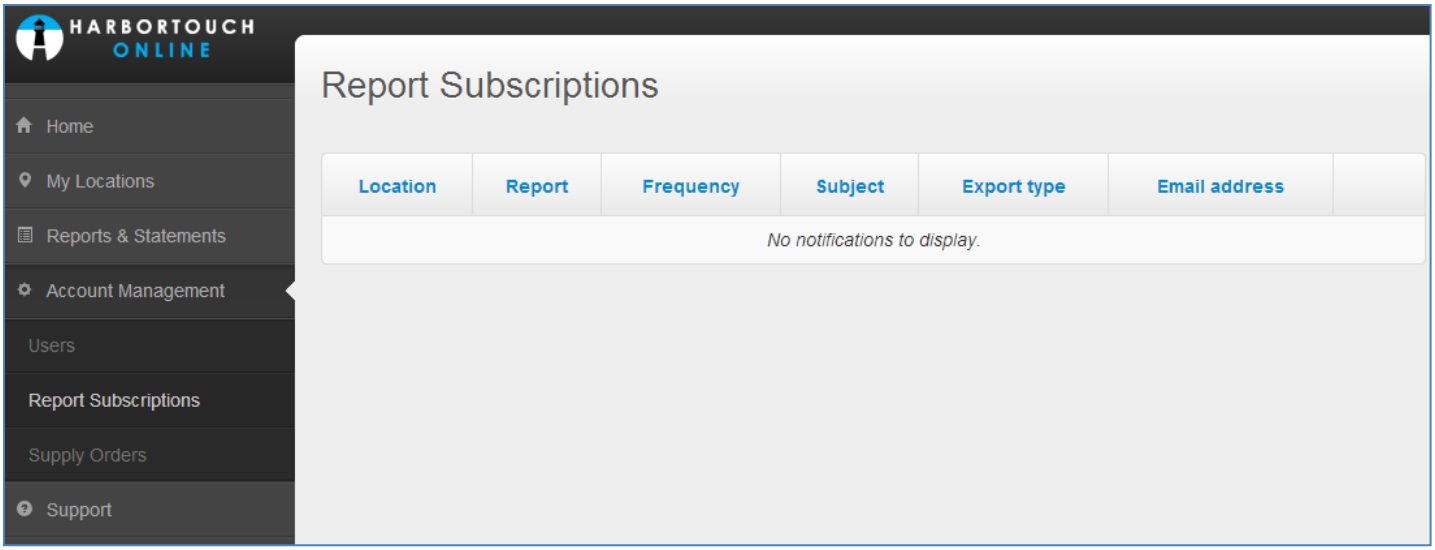
Select the level of access to grant to the new user for any of the **Account-Wide Permissions** (Currently there is only one available) then click on the **Location-Specific Permissions (6)** tab.



Select the level of access to grant to the new user for any of the **Location-Specific Permissions.** To switch locations, use the drop down **(7)** in the upper right. Click on the **Save (8)** button to create the new user with the selected permissions.

Report Subscriptions

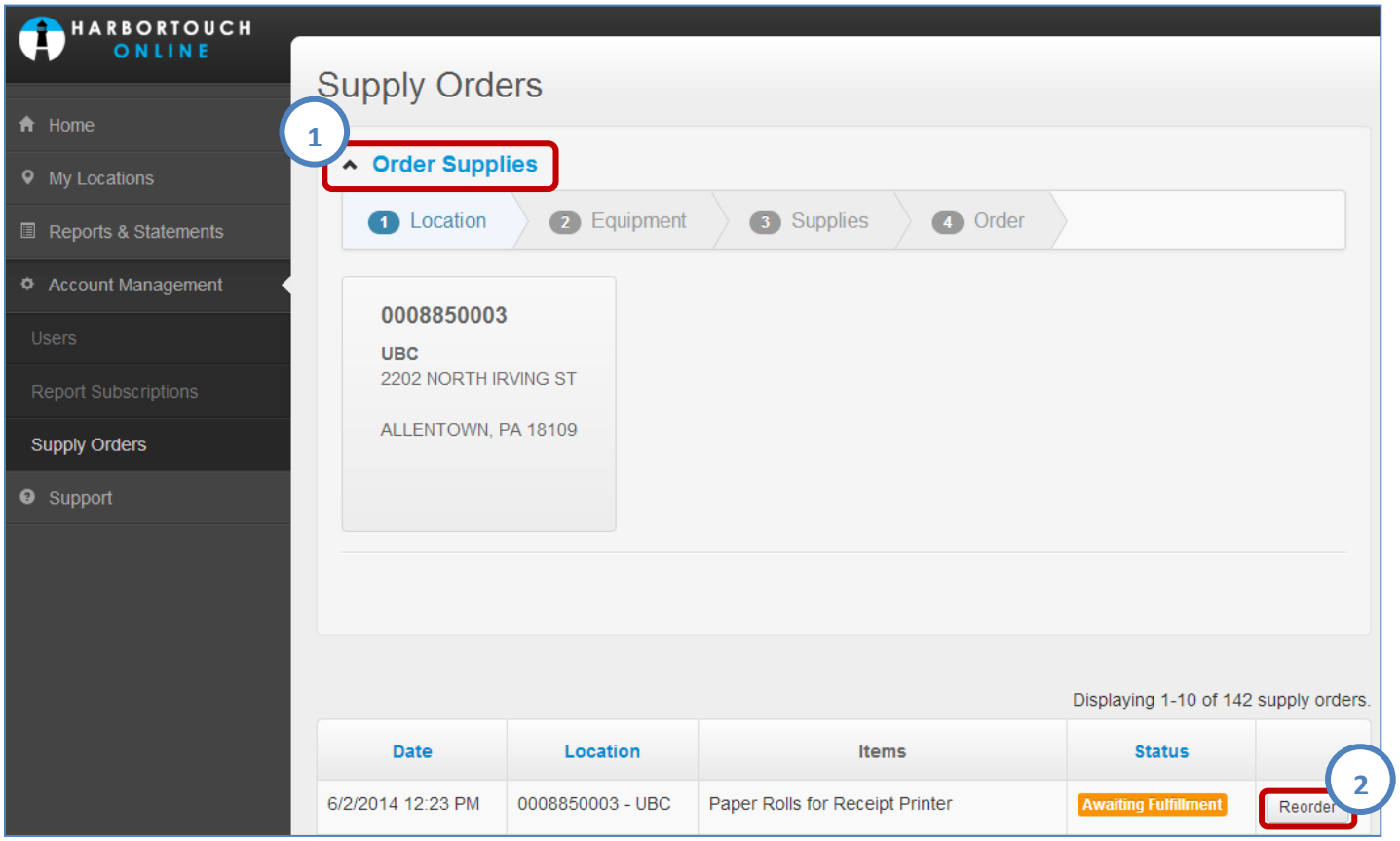
This section displays all existing subscriptions that have been setup on any reports, for any users. In this section you can make changes to or remove any of the existing subscriptions.



New subscriptions cannot be created from this section. To create a new subscription, select **Reports & Statements** from the **Navigation Pane**, find the report you want to create a subscription for, and select the **Subscribe** button.

Supply Orders

This section displays any orders that have been placed with Harbortouch for supplies (i.e. receipt paper, ink ribbons, etc.). You can see the date the order was placed, the merchant account that placed the order (useful if you have multiple locations), the items that were in the order, and the current status of the order.



From this section you also have the option of placing a new supply order or repeating a previous order. To place a new order, click on the **Order Supplies (1)** heading at the top of the page and follow the short, four-step wizard to submit the order.

To repeat an order, find the order in the list below and press the **Reorder (2)** button at the far right.

Support

Dashboard

The **Dashboard** section contains a listing of useful contact information. It displays phone numbers for Technical Support, Customer Service as well as the name, phone number, and email address of your Harbortouch sales representative.

Support Center

Selecting **Support Center** from the **Navigation Pane** will open a new browser window to the Harbortouch Knowledge Base. From there you will be able to search for a solution to any problem you may be having or open a chat to a Harbortouch Technical Support representative for assistance.