



ORDERSOFT SET UP GUIDE FOR CLOVER V1.1



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Introduction:

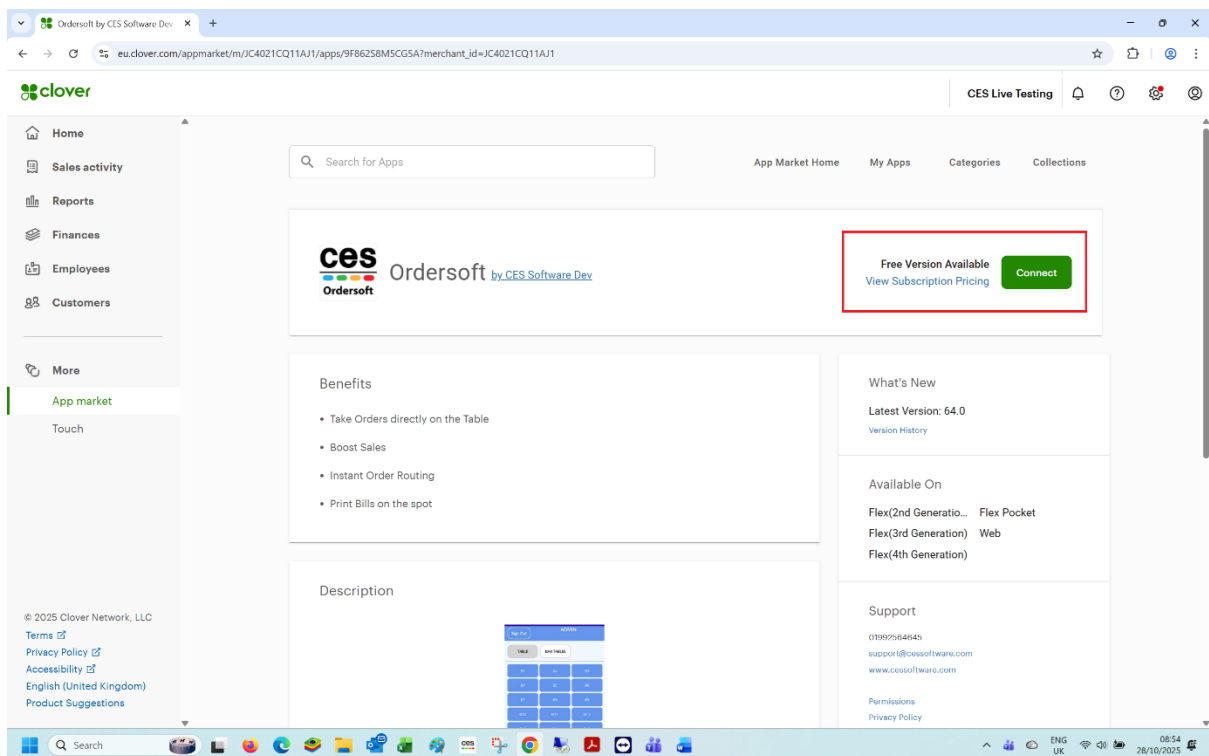
Ordersoft is an Android app designed for order-and-pay-at-table in the hospitality environment. It works seamlessly alongside CES Touch EPOS Software, allowing staff to add food and drink items to tables and take payments directly on the same device. Ordersoft is fully compatible with the Clover Flex range of terminals. The Ordersoft app communicates with the POS via the Ordersoft Bridge, which manages the exchange of data between the app and the POS as required.

Connecting the Ordersoft App to Clover:

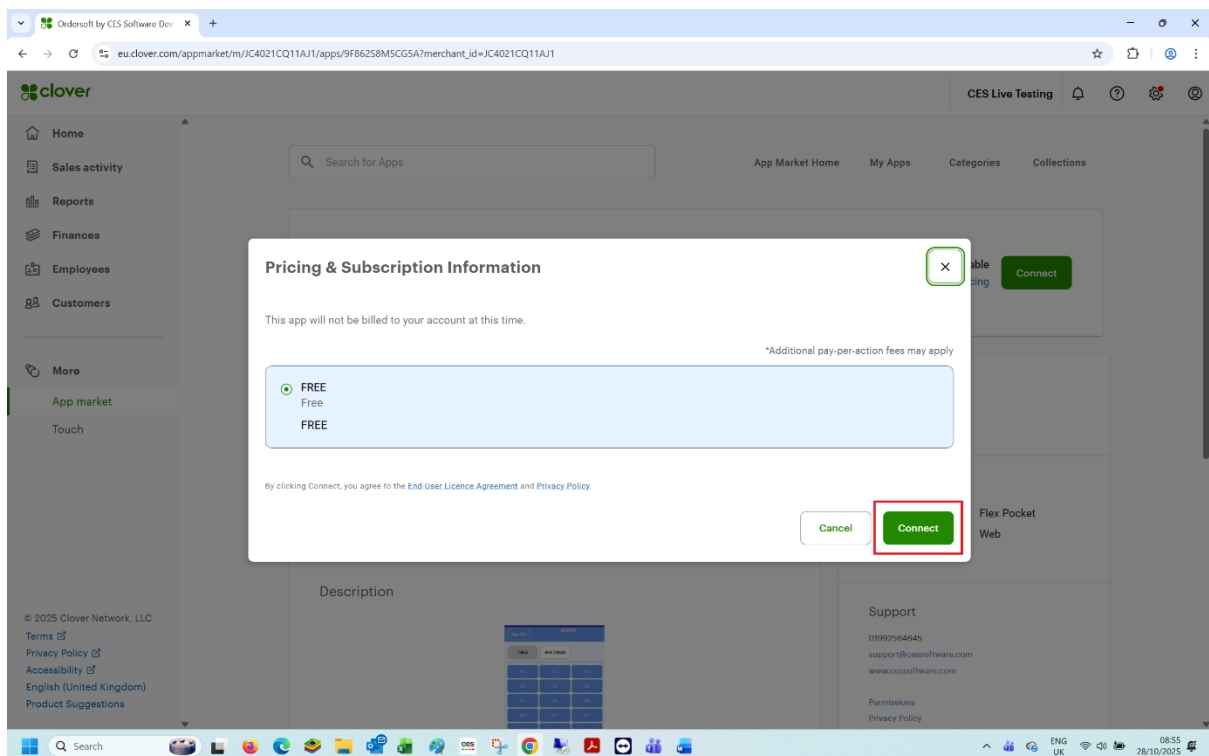
The Ordersoft app must be connected through the merchant's Clover portal and downloaded directly to the terminal from the App Market (accessible via the App Market icon on the terminal's home screen).

To connect the Ordersoft app:

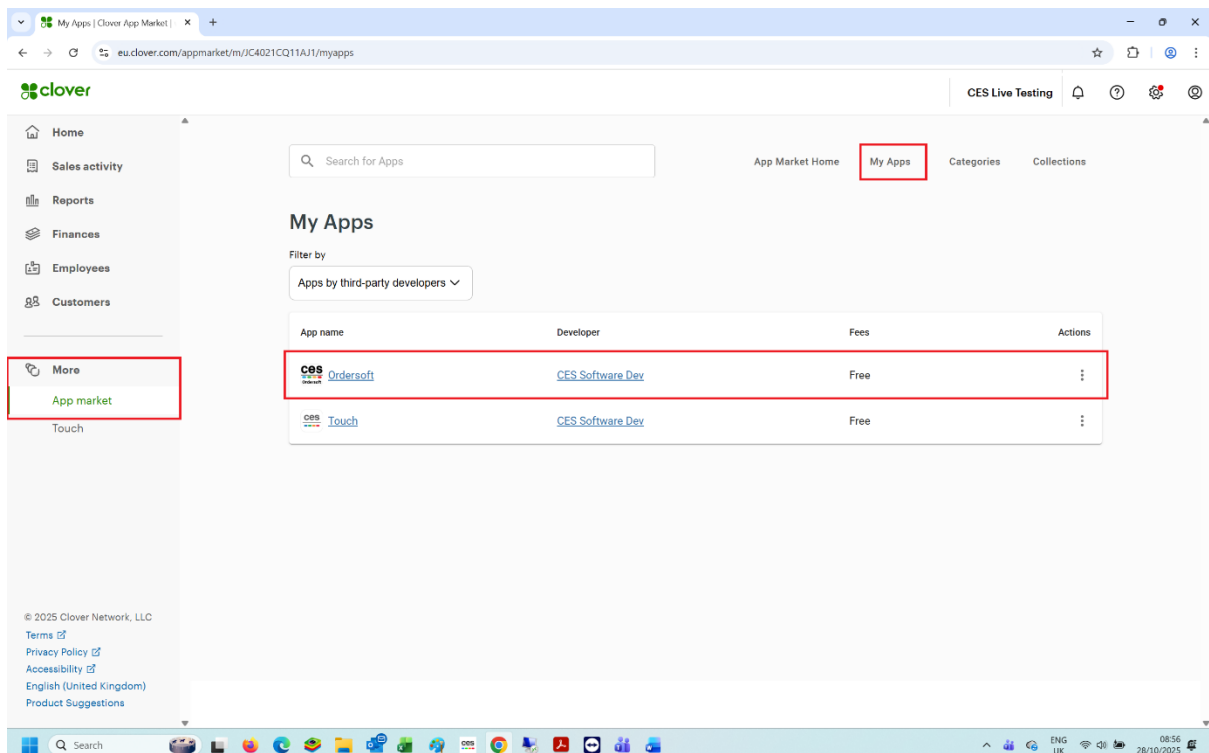
1. Click on the link below
https://www.eu.clover.com/oauth/authorize?client_id=9F862S8M5CG5A
2. Log in to the merchant's Clover account and complete the two-factor authentication process.
3. Click the green **"Connect"** button to link the Ordersoft app to the merchant's account.



- When the screen below appears, click the green **“Connect”** button. Once completed, the Ordersoft app should be successfully connected to the merchant’s Clover account.



- Once connected the Ordersoft app will be displayed in the My Apps tab on the merchants Clover portal



Installing the Ordersoft App:

Once the app has been connected to the merchant's Clover portal the Ordersoft app can then be downloaded directly onto the Clover payment terminal.

1. On the terminal's home screen, tap the **App Market** icon, (the app is a private app and is not accessible in the main section of the App Market).
2. From the top menu, select **My Apps** — the **Ordersoft App** will appear there and can be downloaded from this section.

Licence Ordersoft App:

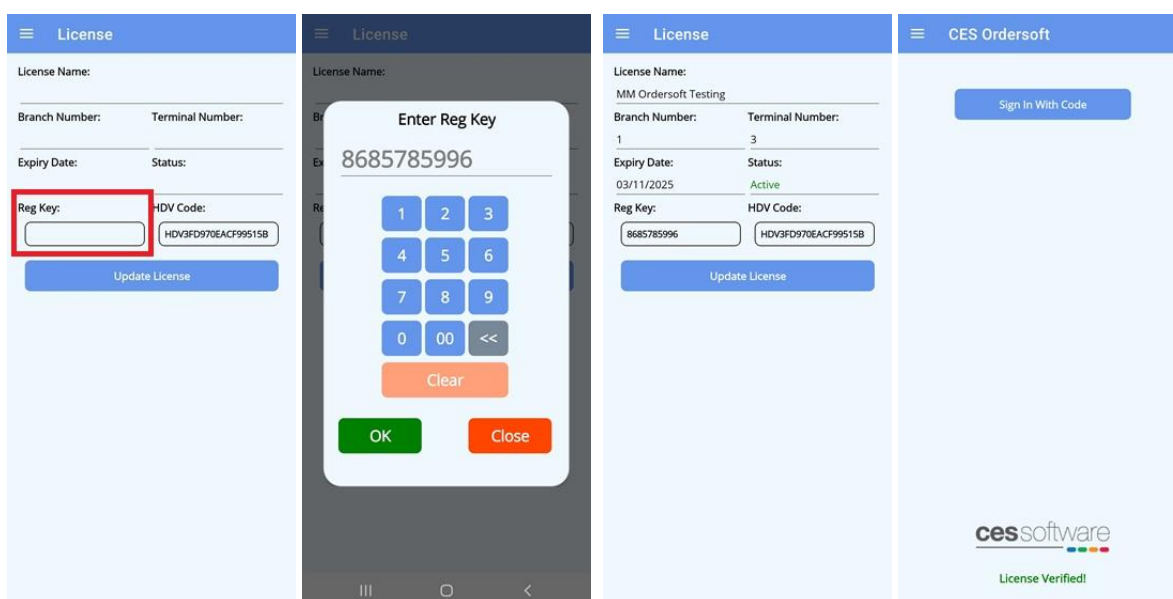
The Ordersoft App needs to be licenced on each payment terminal and gets set with a branch and terminal number the same as Touch. When ordering Ordersoft licenses from CES Software the branch and terminal numbers required need to be requested in advance.

When opening the Ordersoft App for the first time, the **License** screen on the left will appear.

1. Tap in the Reg Key box highlighted on the first image
2. The number pad highlighted in the second image will appear, enter a valid **Ordersoft Registration Key** and press the **Green "OK"** button
3. Tap the **Blue "Update License"** button as shown on the third image, if successful the licence details will be populated

Once the license has been verified, **"License Verified!"** will appear at the bottom of the sign on screen as shown in the fourth image.

Note: You will not be able to proceed any further until the Ordersoft App has been successfully licensed.



OrderSoft Bridge:

The Ordersoft is the middleware between the Ordersoft app and the CES Touch Epos software and is typically run on the master terminal. In certain environments for example where there may be a retail till as the master and a restaurant till as a slave it is fine to run the Ordersoft Bridge on the restaurant till.

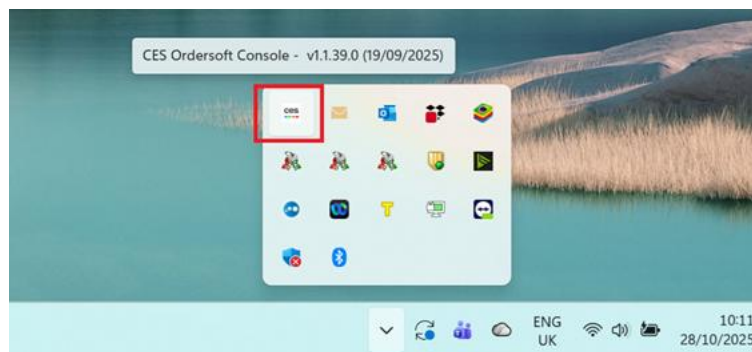
The OrdersoftBridge.exe is in the C:\Touch\OrderSoft\ folder. It can be started manually by double-clicking the OrderSoftBridge.exe or by using a desktop shortcut.

The setting below must be enabled on the till running the Ordersoft Bridge. This setting has three functions.

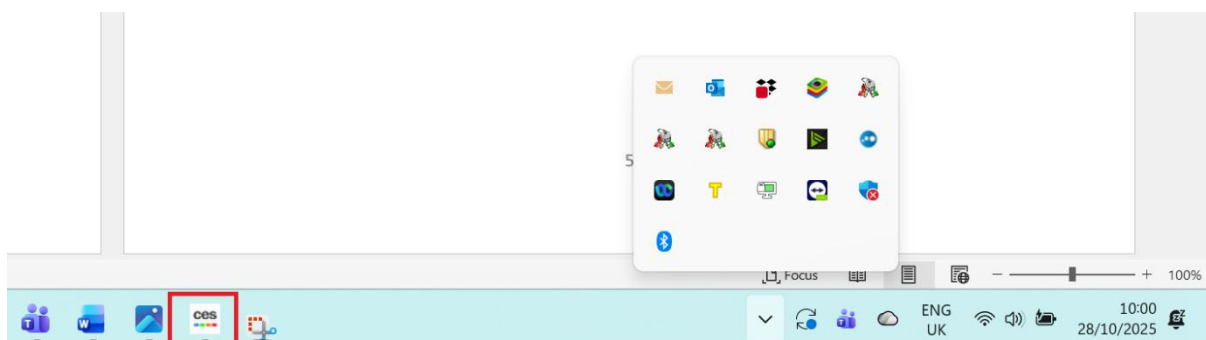
1. It will monitor the Ordersoft Bridge to ensure it is always running
2. It will check for updates when the CES Touch software is started
3. It will enable an option to add Ordersoft terminals to the intelligence configuration screen



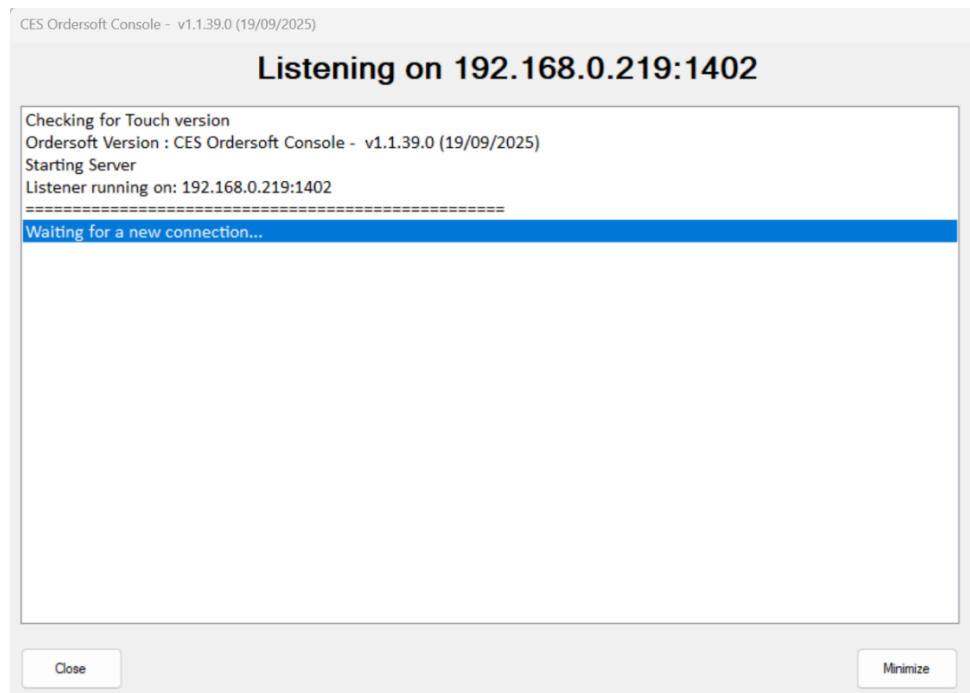
The OrderSoft Bridge runs minimised in the background, and when active, an icon will appear in the system tray.



To run the Ordersoft Bridge in full screen mode click on the CES OrderSoft icon in the system tray and then click on the highlighted icon below that will show on task bar.

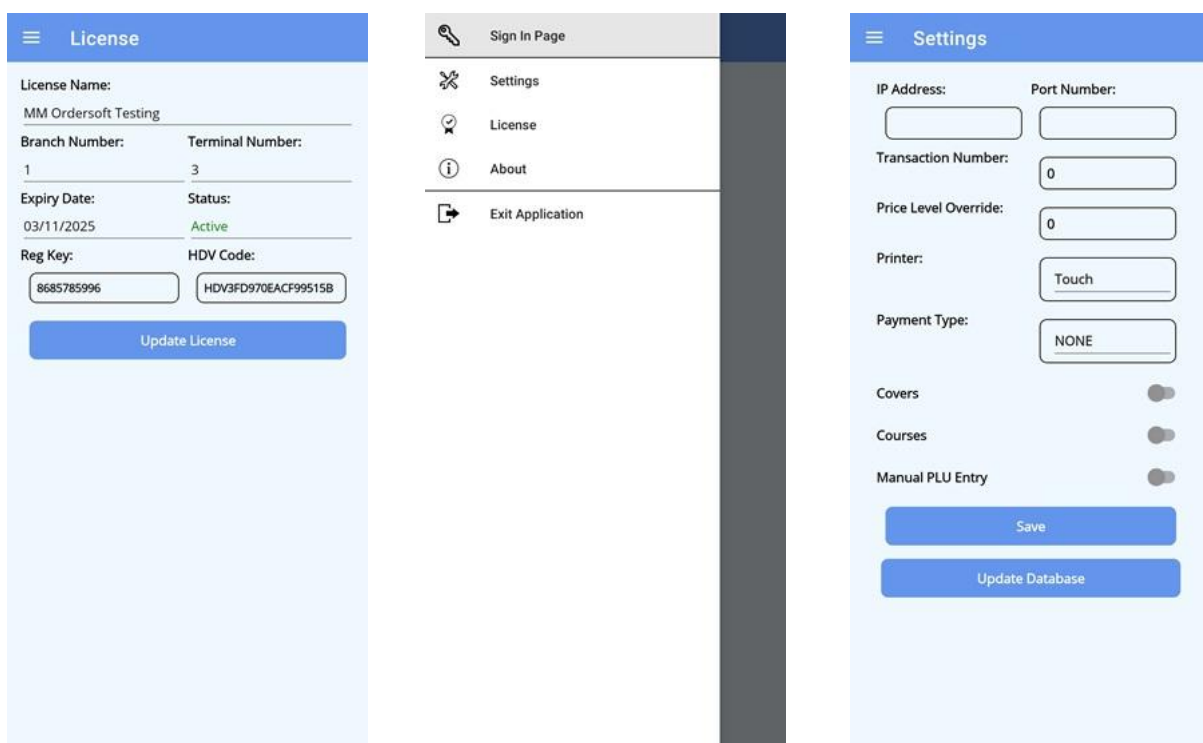


The Ordersoft Bridge screen will display the IP address of the till it is running on and will use the default port 1402.



OrderSoft App Settings:

- Once the Ordersoft App is licensed click on the menu bar in the top left corner to display the menu on the second image and select the Settings option, a blank settings screen will appear



- Set the IP address and port number as displayed on the Ordersoft Bridge, the pop-up number pads will appear when tapping inside the IP Address and Port Number boxes. Enter the details and press the green OK button on each.

- Set the Printer and Payment Type, by tapping in the relevant settings box to bring up the options shown below. Select the printer type as Clover if printing on the Clover payment terminal or set to Touch if printing on the POS. Set the Payment Type to Clover.

- Now tap the **Save** button and the settings Saved Successfully message box will be displayed.

- Once the settings have been saved tap the **Update Database** button this will sync the Ordersoft app with the CES Touch Epos system and import the data it requires. You must restart the app after updating the database.

Optional Settings

Hide Cash Button – This will hide the Cash button on the payment screen

Covers – If enabled will prompt for Covers when opening a table

Courses – Select if Courses are in use on the POS

Manual PLU Entry – Will enable a manual tab for selecting items by entering the PLU number

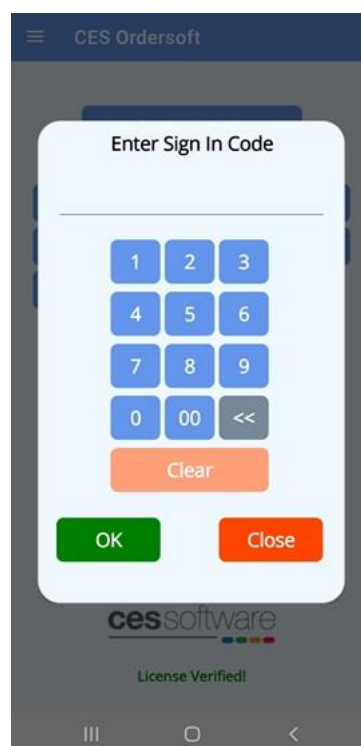
Sign In Page:

Once the Ordersoft app has been configured it will go to the Sign In page when the app is started.

The list of operators displayed is controlled by the Operator set up on CES Touch

The example on the left is where the operators have been set to be displayed on Touch and a button with the operator's name will also be displayed on the Ordersoft app.

Ordersoft also supports manual sign on codes and passwords for operators, again the operator settings on Touch for sign on codes and passwords are also used on Ordersoft. The example on the right is where the **Sign In With Code** button has been tapped, and the number pad opens to enter the operator sign in code.



Once an operator has signed in, their name will appear at the top of the table selection screen. All orders and payments processed will be recorded in Touch under that operator's name. The operator will remain signed in until they tap the **Sign Out** button located at the top of the table selection screen.

Table Selection:

Once an operator has signed in, the Table Selection page will be displayed. In the example below, there are two charge sheets in use — TABLE and BAR TABLE. By default, OrderSoft will display the first charge sheet option (in this case, TABLE). To switch to BAR TABLE, simply tap the BAR TABLE button.



The colours displayed on the table selection buttons match the *CHARGE/V buttons on Touch.

Red = The table is in use on another terminal

Green = The table has a current order

Blue = The table is not currently in use and is available

Product Selection:

When a table has been selected the image on the left showing the departments selected on Touch for use on Ordersoft will be displayed.

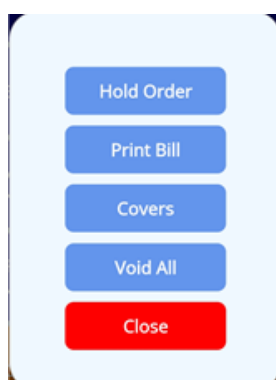
The image in the middle is showing the products available inside a department screen, in this example the SET MENU department has been selected.

The image on the right is showing the basket where the list of items stored on the table can be viewed by tapping on the Basket icon at the bottom of the screen.



Options Menu:

The options menu below is opened by tapping on the gear icon in the top right hand corner when a table is open on the app. The options below are then available to be used and is where you go to print a requested bill before payment has been taken,



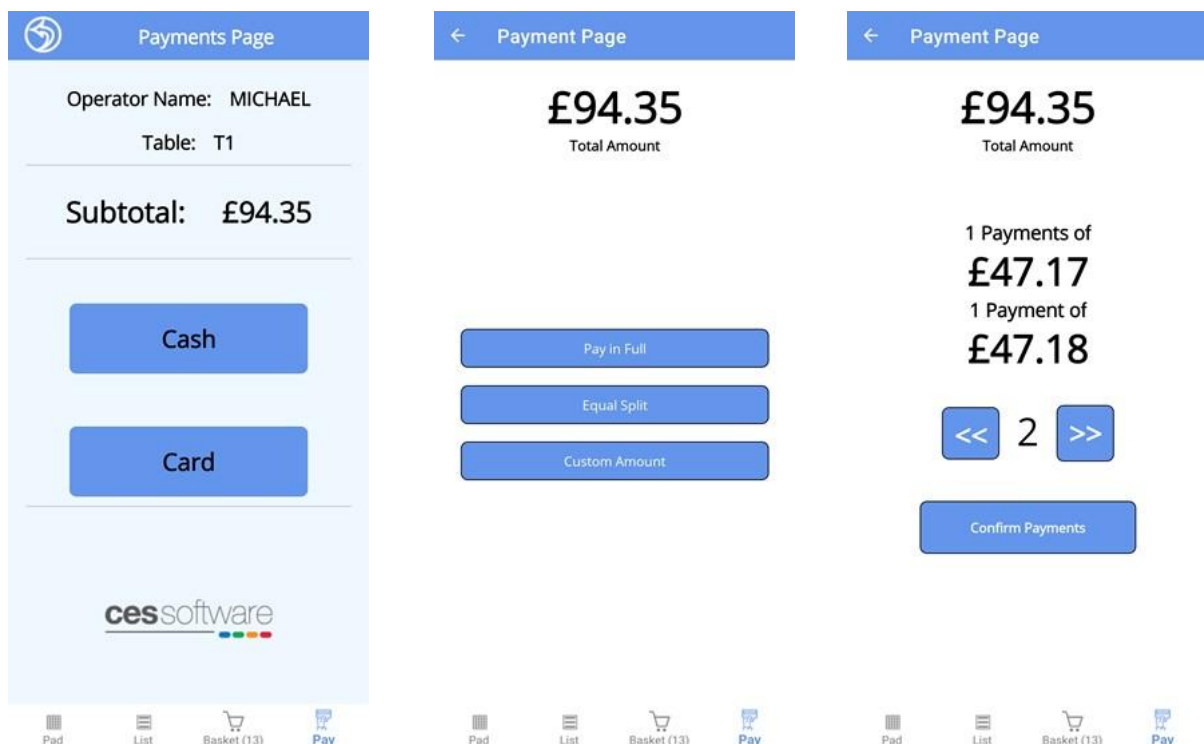
Taking Payments:

The image on the left shows the page that will be displayed when tapping the Pay icon at the bottom of the screen. The Cash option can be disabled in the Ordersoft settings page if the merchant does not wish their staff to take cash payments.

The image in the middle is showing the three options that are available when the Card option is selected.

- Pay in full - Initiates a transaction for the full transaction value
- Equal split – Allows the bill to be split equally, the left and right arrow buttons are used to change the number of splits
- Custom Amount – Allows entering a part payment value (this value cannot exceed the sale total)

The image on the right is showing the Equal Split option.



Tips:

There is a setting to enable Tips on the Clover payment terminals that can be accessed via the Setup icon on the terminals home screen. If enabled Ordersoft will handle tips when taking payments and report on them accordingly.