

PixelPoint<sup>®</sup>

# **Signature Capture**

## Configuration & Functionality

## Publication Details

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### **Patents**

The following patents apply to some areas of functionality within the PixelPoint software suite: Pat. 6,384,850; 6,871,325; 6,982,733; 8,146,077; 8,287,340

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## Overview

PixelPoint POS now offers the ability to capture customer signatures within the POS during the payment authorization process. Users will create a new form with an allocated space for the customer to place their signature, which can then be printed as part of the customer receipt and/or authorization slip. This feature supports dual-monitor station environments and requires a touch-enabled monitor in order to be utilized.

## Requirements

- POS v17.6.x
- Touch screen-enabled monitor
  - Single and dual-monitor environments supported
- POS Signature.oth file
  - Place in the Template folder on the POS Server, where PixelPoint is run.
    - C:\\POSServer\\PixelPOS\\Templates (if using classic/non-HA version)
    - C:\\POSServer\\PixelServer\\Templates (if using High Availability version)

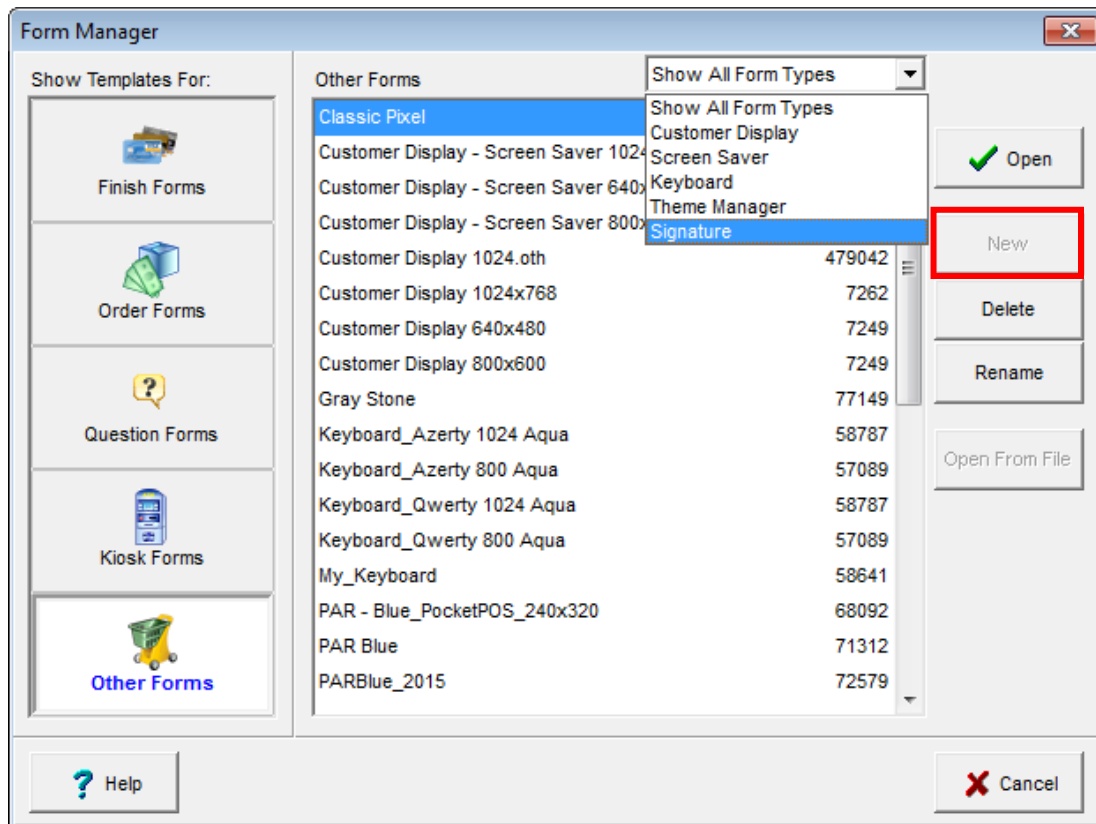
## Policies

- DisplaySignatureOnPay Policy
  - Set to Yes (default)

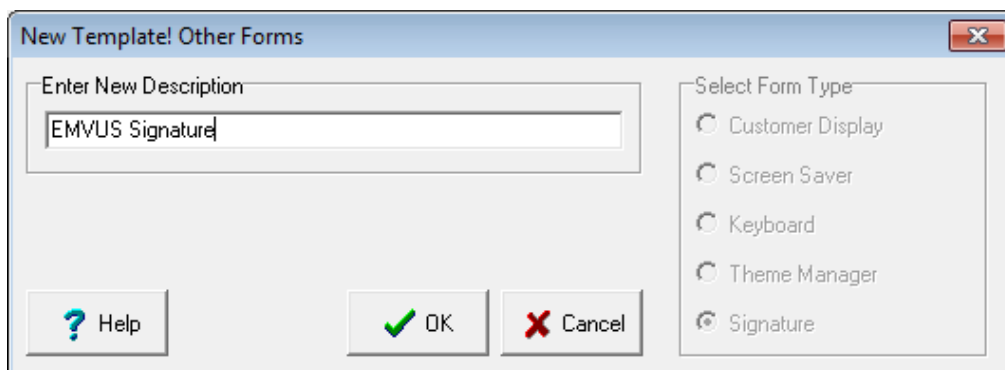
## Signature Form

To create a Signature Form that allows customers to sign on-screen:

1. In BackOffice, open Form Designer.
2. Select the Other Forms template.
3. Using the dropdown menu at the top of the window, select Signature.



4. Click the New button to create a new form.
5. Enter a name for the new form and click OK.





6. The system will ask to import a template from a file. Click Yes.
7. Locate and select the provided POS Signature.oth file. The template form is shown below.

The screenshot shows a Windows-style application window titled 'POS Signature'. It contains a large rectangular drawing area at the top. To the left of this area is a smaller rectangular box labeled 'PixelMemo1'. Below the drawing area is a grid of buttons: 'Switch Monitor', '\$10', '10%', 'Clear', '\$20', '20%', 'Enter Amount', and 'Enter Percent'. At the bottom of the window, there are labels for 'Net Total', 'Net Total Tip', and 'Custom Tip', followed by a 'Method of Payment' label and 'Cancel' and 'OK' buttons.

The object inspector window on the right side of the Form Designer has a dropdown menu that allows users to select the various components of the template. Each component can be edited and customized to the preference of the user, both in terms of look as well as functionality.

The chart below lists the components of the template and describes their intended function.

PixelDrawingBox1	: TPixelDrawingBox
PixelDrawingBox1	: TPixelDrawingBox
PixelFormStyle1	: TPixelFormStyle
PixelFunctionBtn1	: TPixelFunctionBtn
PixelFunctionBtn10	: TPixelFunctionBtn
PixelFunctionBtn11	: TPixelFunctionBtn
PixelFunctionBtn2	: TPixelFunctionBtn
PixelFunctionBtn3	: TPixelFunctionBtn
PixelFunctionBtn4	: TPixelFunctionBtn
Color	<input type="checkbox"/> clBtnFace
Ctl3D	<input type="checkbox"/> False
Enabled	<input checked="" type="checkbox"/> True
Font	(TFont)
Height	395
Hint	
Left	316
Name	PixelDrawingBox1
PenColor	<input checked="" type="checkbox"/> clBlack
Tag	0
Thickness	3
Top	14
Width	692

Component (Button Type)	Function	Required Settings
PixelDrawingBox (TPixelDrawingBox)	Defines the space on the form where the customer signs. Only one is needed per form.	
ClearSignature (TPixelFunctionBtn)	Clears the drawing box from any signature entry by the customer. One per form.	FunctionType=ftSpecial, FunctionName=Clear Drawing Box
SwitchMonitor (TPixelFunctionButton)	In a station environment where there is both a cashier and customer-facing monitor, this function allows input to be received on the customer-facing monitor in order for them to sign. The form is duplicated from the cashier's monitor to the customer's, though input will only be allowed on the customer-facing monitor until it is switched back. One per form.	FunctionType=ftSpecial, FunctionName=Switch Monitor3
PaymentMethod (TPixelLabel)	Shows the method of payment selected. One per form.	FunctionType=ftSpecial, FunctionName=Method of Payment
Amount10/20 (TPixelFunctionBtn)	These buttons automatically add a pre-set tip amount to the total of the check. Users can create as many buttons as they would like with different pre-set amounts. The entry in the Caption field determines the tip amount. The examples shown are set for a \$10 or \$20 tip (one per button).	FunctionType=ftCustomTip, FunctionName=Enter Fixed Amount, Caption=\$10/\$20, GroupIndex=1
ManualAmount (TPixelFunctionBtn)	Allows the customer to manually enter a custom tip amount. One per form.	FunctionType=ftCustomTip, FunctionName=Enter Manual Amount, GroupIndex=1
Percentage10/Percentage20 (TPixelFunctionBtn)	<p>These buttons automatically calculate and add a 10% or 20% tip based on the total of the check. Users can create as many buttons as they would like with pre-set tip percentage amounts. The entry in the Caption field determines the tip percentage. The examples shown are set for a 10% or 20% tip (one per button).</p> <p><b>Note:</b> To have a tip percentage button display the equivalent dollar amount based on the value of the check, enter the FunctionName as Enter Default Fixed Percent.</p>	<p>FunctionType=ftCustomTip, FunctionName=Enter Fixed Percent, Caption=10%/20%, GroupIndex=1</p> <div>  Enter Fixed Percent            Enter Default Fixed Percent       </div>

ManualPercentage (TPixelFunctionBtn)	Allows the customer to manually enter a custom tip percentage, calculated using the total of the check. One per form.	FunctionType=ftCustomTip, FunctionName=Enter Manual Percent, GroupIndex=1
PixelItemList (TPixelItemList)	Lists the items being purchased. One per form.	
PixelMemo (TPixelMemo)	Displays an itemized total of the order. One per form.	FunctionType=mtSpecial, FunctionName=Totals
AmountDue (TPixelLabel)	Displays the amount owing for the order. One per form.	FunctionType=ltSpecial, FunctionName=Amount Due
NetTotal (TPixelLabel)	Displays the net total. One per form.	FunctionType=ltSpecial, FunctionName=Net Total
CustomTip (TPixelLabel)	Displays the tip amount being added to the bill. One per form.	FunctionType=ltSpecial, FunctionName=Custom Tip
PaymentMethod (TPixelLabel)	Displays the method of payment selected. One per form.	FunctionType=ltSpecial, FunctionName=Method of Payment
Cancel (TPixelFunctionBtn)	Closes the form without applying the signature or tip. One per form.	FunctionType=ftNormal, ModalResult=mrCancel
OK (TPixelFunctionBtn)	Closes the form and applies both signature and tip. One per form.	FunctionType=ftNormal, ModalResult=mrOk



## BackOffice Configuration

### Payment Method Setup

To enable the POS to prompt for an on-screen signature when using a specific payment method:

1. In BackOffice, navigate to Administrator>Payment Method Setup.
2. Locate the Method of Payment you wish to prompt for a signature, or create a new payment method.
3. Click the Advanced tab.
4. Check the box Ask for Signature on the POS.

**CASH** ☒ Is Active? ✕

Method of Payment | **Advanced** | Payment Denominations

Accounting Code

Tip Accounting Code

Custom DLL

Cash Change Processing

☐ Print Customer Authorization Slip with Transaction Receipt  
☐ ...and also when receipt is reprinted  
☐ Do not print Customer Authorization Slip

Min Value  ... Max Value  ...

☐ Always Print on Receipt  
☐ Do not ask for swipe  
☐ Do not ask for Expiry Date  
☐ Ask for CVV on manual entry  
☐ Applies to internal member gift cards only  
☐ Do not show in POS payment list  
☐ Prompt for Payment Note  
☒ Allow Voids  
☐ Do not show in Gift Card list  
☒ Ask for Signature on the POS

Printed Card Number Format

**Methods of Payment Setup**

Repeat the above steps for each method of payment method you wish to prompt for a signature. Signature capture functionality can be used on any type of payment method.

## Printer Code Setup

To allow for captured signatures to be printed on authorization slips and receipts:

1. In BackOffice navigate to Administrator>Printer Code Setup.
2. Locate the printer being used.
3. Enter the appropriate codes in the Normal Print and Bit Image Code fields.
  - The Normal Print field requires the codes 25,50 at the beginning, in addition to any other codes in use in that field.
  - The Bit Image Code field requires the following codes: 27,51,x,27,42,x. The "x" should be replaced with either a 0 for single-density strokes or 1 for double-density strokes.

### Printer Codes Setup

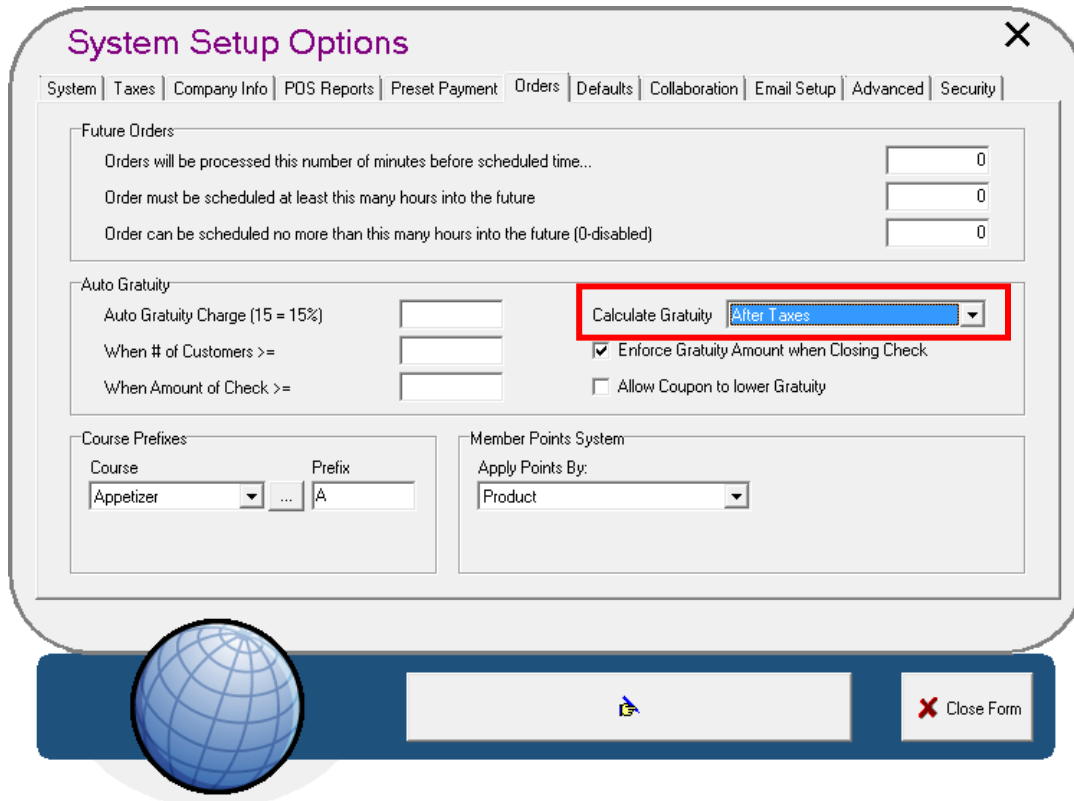
Print Description	Epson TM-88IIP	Print Bar Code	29,119,2,29,107,4
Printer Start Job Code		Print Logo	27,97,1,28,112,1,0
Cut Code if applicable	27,105	Bit Image Code	27,51,0,27,42,0
Open Drawer #1	27,112,0,10,80		
Open Drawer #2	27,112,0,10,80		
Open Drawer #3			
Normal Print	27,50,27,33,0,27,97,0		
Turn Red Print On	27,33,32		
Turn Red Print Off			

**Note:** The above example shows printing codes for an Epson TM-88 printer. Epson has set most code standards for POS printers, so the above codes are likely to work for many different makes and models.

## System Setup

To select whether tips will be added to the transaction total before or after taxes:

1. Navigate to BackOffice>Administrator>System Setup>Tab Orders.
2. In the Auto Gratuity section, use the Calculate Gratuity dropdown to choose whether tips will be applied before or after taxes are applied to the transaction.



The screenshot shows the 'System Setup Options' dialog box with the 'Orders' tab selected. The 'Auto Gratuity' section is highlighted with a red box, showing the 'Calculate Gratuity' dropdown menu set to 'After Taxes'. The 'Future Orders' section contains three input fields for scheduling. The 'Course Prefixes' section shows a 'Course' dropdown set to 'Appetizer' and a 'Prefix' input field with 'A'. The 'Member Points System' section shows an 'Apply Points By:' dropdown set to 'Product'. The dialog box has a blue header bar with a globe icon and a 'Close Form' button.

**System Setup Options**

System | Taxes | Company Info | POS Reports | Preset Payment | **Orders** | Defaults | Collaboration | Email Setup | Advanced | Security

**Future Orders**

Orders will be processed this number of minutes before scheduled time...

Order must be scheduled at least this many hours into the future

Order can be scheduled no more than this many hours into the future (0-disabled)

**Auto Gratuity**

Auto Gratuity Charge (15 = 15%)

When # of Customers >=

When Amount of Check >=

Calculate Gratuity **After Taxes**

☒ Enforce Gratuity Amount when Closing Check



☐ Allow Coupon to lower Gratuity

**Course Prefixes**

Course  Prefix

**Member Points System**

Apply Points By:

  **X Close Form**

## Applying Signatures in the POS

Once the appropriate methods of payment have been configured to prompt for a signature and a Signature Form has been created and selected in BackOffice, the POS is ready to accept customers signatures during the payment process.

When ready to accept payment, the user will proceed to the Signature Form. The customer will then select a tip option using either the preset amount, percentage or custom amount tip buttons and enter their signature into the provided area on the form. The OK button will remain disabled until a signature has been entered into the provided area.

The screenshot shows the POS Signature Form interface. On the left, a list of items is displayed with their quantities, names, and prices. The last item, '1 (A) Test Product 1 \$5.00', is highlighted in red. Below the list, a summary box shows: 'Net Total : \$52.50', 'HST \$6.83', 'Final Total : \$59.33'. At the bottom left, the totals are repeated: 'Net Total \$52.50', 'Amount Due \$59.33', 'Tip \$11.87'. The word 'CASH' is centered at the bottom. On the right, a large grey area is for the signature. Below it, a keypad contains buttons for '\$10', '10%', 'Clear', '\$20', '20% [\$11.87]', 'Enter Amount', 'Enter Percent', 'Cancel', and 'OK'.

2	(A) Test Product 1	\$10.00
1	(M) Test Product 2	\$4.50
1	(A) Test Product 1	\$5.00
1	(M) Test Product 2	\$4.50
1	(A) Test Product 1	\$5.00
1	(M) Test Product 2	\$4.50
1	(A) Test Product 1	\$5.00
2	(M) Test Product 2	\$9.00
1	(A) Test Product 1	\$5.00

Net Total : \$52.50  
HST \$6.83  
-----  
Final Total : \$59.33

Net Total \$52.50  
Amount Due \$59.33  
Tip \$11.87

**CASH**

\$10 10% Clear

\$20 20% [\$11.87]

Enter Amount Enter Percent

Cancel OK

Selecting a custom tip amount or percent option will prompt the keypad to appear for the customer to enter the desired tip amount.

The Clear button can be used to clear the signature field if the customer wishes to reenter the signature.

The screenshot shows the 'Enter Amount' keypad. It has a dark blue header with the text 'Enter Amount'. Below the header is a white input field displaying the number '10'. The keypad contains buttons for digits 0-9, a decimal point, a 'Cancel' button with a red 'X', a 'Clear' button, and an 'OK' button with a green checkmark.

Enter Amount

10

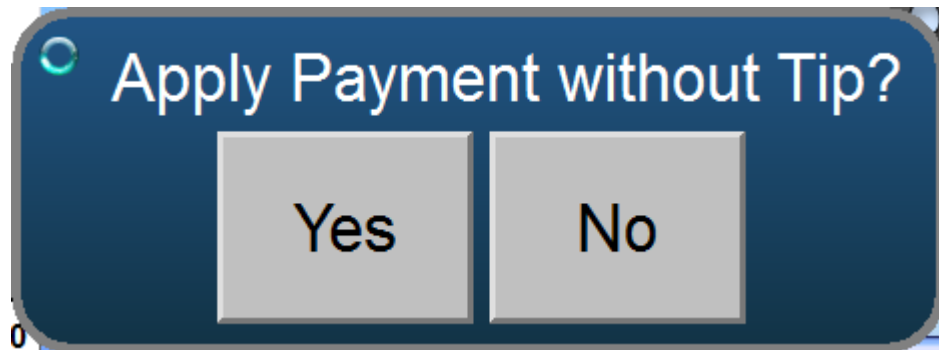
7 8 9 Cancel

4 5 6 Clear

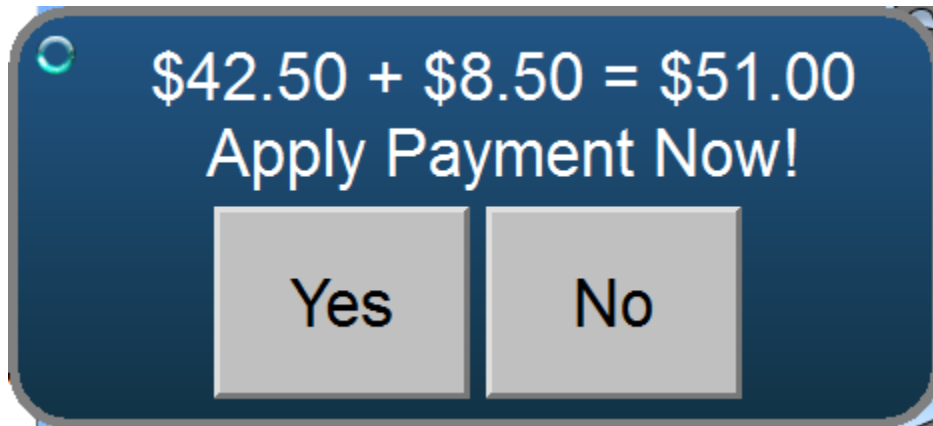
1 2 3 OK

0 .

If the cashier selects the Cancel button, the POS will display the following prompt. Selecting Yes will process the transaction without applying a tip or customer signature. Selecting No will cancel the payment altogether.



Once a tip has been selected and a signature entered, the user will click the OK button to process the payment. A confirmation message will appear for a final approval.



If a second, customer-facing monitor is present and the SwitchMonitor component was added to the Signature Form during the form creation process, the user will have the option to send limited control of the form to the customer in order for them to enter a tip and signature.

**Cashier-facing Form**

2	@	Test Product 1	\$10.00
1	@	Test Product 2	\$4.50
1	@	Test Product 1	\$5.00
1	@	Test Product 2	\$4.50
1	@	Test Product 1	\$5.00
2	@	Test Product 2	\$9.00
1	@	Test Product 1	\$5.00

Net Total : \$43.00  
HST : \$5.59  
=====

Final Total : \$48.59

Net Total \$43.00  
Amount Due \$48.59  
Tip \$9.72

**CASH**

**Send to Customer**

\$10 10% Clear

\$20 20% [\$9.72]

Enter Amount Enter Percent

Cancel OK

**Customer-facing Form**

2	@	Test Product 1	\$10.00
1	@	Test Product 2	\$4.50
1	@	Test Product 1	\$5.00
1	@	Test Product 2	\$4.50
1	@	Test Product 1	\$5.00
2	@	Test Product 2	\$9.00
1	@	Test Product 1	\$5.00

Net Total : \$43.00  
HST : \$5.59  
=====

Final Total : \$48.59

Net Total \$43.00  
Amount Due \$48.59  
Tip \$9.72

**CASH**

\$10 10% Clear

\$20 20% [\$9.72]

Enter Amount Enter Percent

When the Send to Customer button has been selected, the button will then read Back to Cashier on the cashier screen and can be used to return control of the form to the cashier. Notice that the customer-facing screen does not have this option, and also does not include the OK or Cancel buttons, ensuring the cashier retains the ability to approve and finalize the transaction before proceeding.

If using split cheques or partial payments, this screen will appear as many times as payments are needed to settle the check, assuming each selected method of payment being used is set up to Ask for Signature.

## Print Variables

The following variables must be added to their respective layouts in order for the captured signature to be printed:

### Order Receipt

Insert the variable "&payment\_Signature" in the payment section of the order receipt to include the captured signature on printed receipt.

Example:

```
&section_payment
&payment_descr:-28&payment_total:12
&payment_Signature
&section_end
```

### Authorization Slip

Insert the variable "Signature" in the authorization slip layout to include the captured signature on the authorization slip.

Example:

```
[Type_Vendor]
[Custom]
^L
^C&Header
^C^W&#3182&REFERENCE_NO
^C^W&#3191
^C^W&#3166 &TABLE_NUM
^C^NServer: &OPERATOR   Trans Date: &DATE_TIME
^L
^W&#3174   &SALES_TOTAL
&_
&EMV_PRINTOUT
&_
&Signature
```