

Setting up public holiday surcharges

Automatic surcharges

ESTIMATED TIME 20 minutes

A surcharge set up in the back office applies itself. You build a schedule of public holidays, list the dates, and attach a percentage surcharge to that schedule — from then on it goes onto bills on those days and nowhere else, with nobody having to remember to switch it on.

Before you start

- Access to POS Management in PowerEPOS.
- Your public holiday dates.
- The surcharge percentage you want to charge.

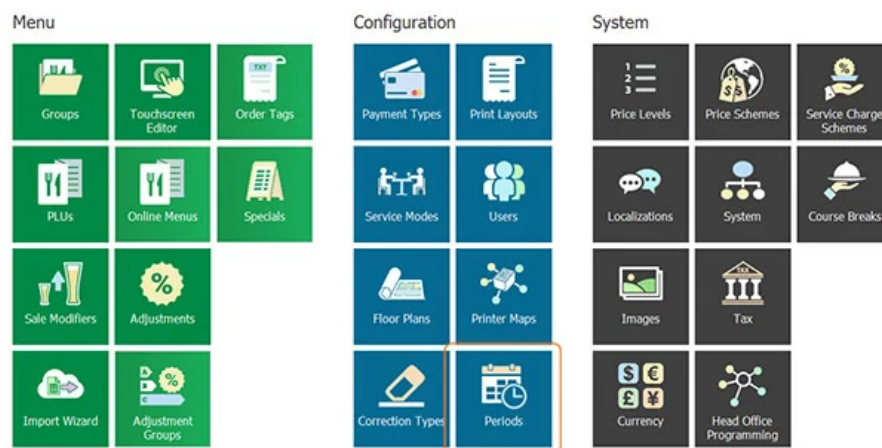
NOTE Publishing

Each part of this ends with a publish, and it is the same publish every time: go back to the POS Management screen, select **Publish** at the top right, check the changes and the locations are right, and select **Publish** to roll them out to the POS.

Creating the schedule

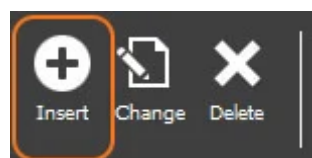
1 Open Periods

From POS Management, open **Periods**.



2 Insert a new period

Select **Insert** from the toolbar.



3 Choose For normal use

For the time period, select **For normal use**.

What will this time period be used for?

For normal use

You will have access to the full array of functionality available with predefined period configuration.

For use with Online Menus

You will only be able to configure partial functionality for this predefined period, specifically the parts that are applicable and supported by Online Menu availability.

4 Name it and save

Give the schedule a name — *Public Holidays* here — set the date range to **Single Day**, and select **Save**.

1. Locale: Common

Includes following time range(s):

15/03/2024 All day

2. Date Range: **Single Day**

from: 15/03/2024

No ☒ Use time period?

+ × 👁
Insert Delete Show Deleted

3. Save Cancel

5

Publish

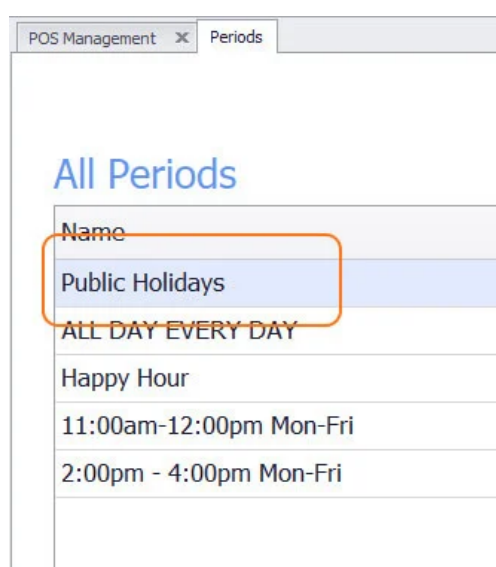
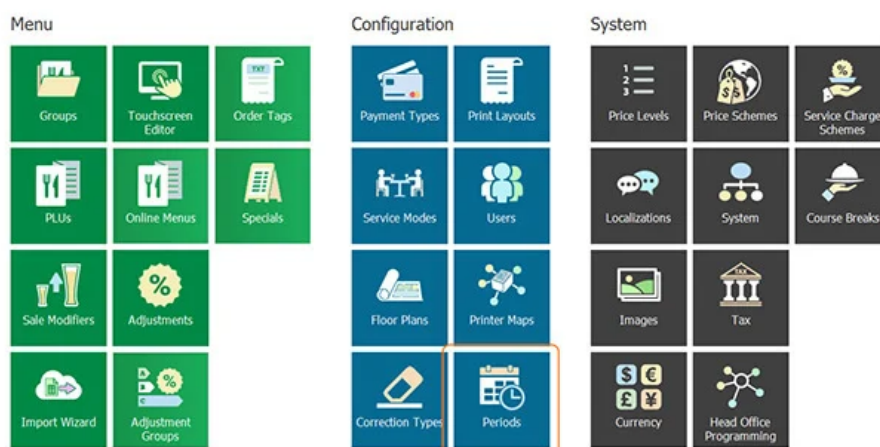
Publish the change out to the POS. The schedule now exists and is ready for dates.

Adding the public holiday dates

6

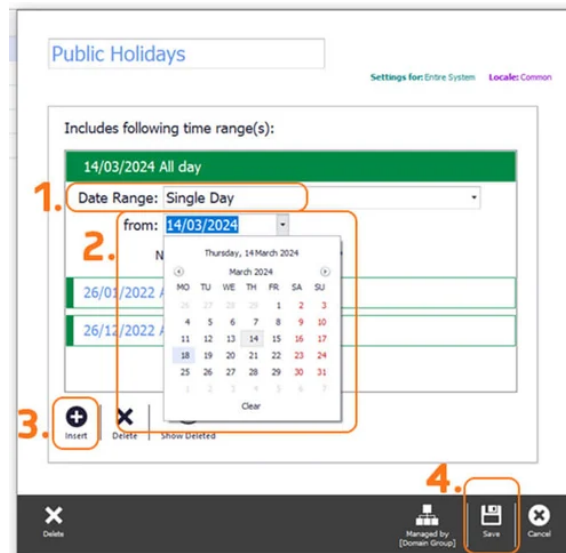
Open the schedule

From POS Management, open **Periods**, then double-click **Public Holidays**.



7 Add each date

Choose **Single Day** from the drop-down, pick the public holiday from the calendar, and select **Insert**. Repeat that for every date you want, then select **Save** once at the end.



8 Publish

The dates are listed but unpublished until you send them out. Publish the change to the POS.

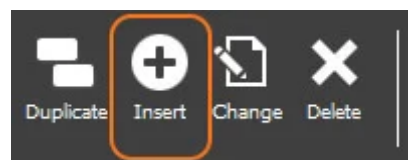
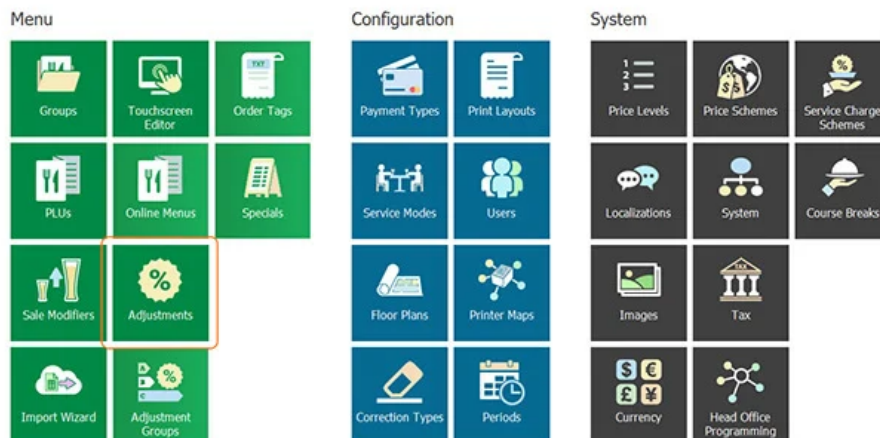
All Periods			Settings for: Entire System	Locale: Common
Name	Summary	Status		
Public Holidays	[29/03/2024 All day] [26/12/2024 All day] [1/04/2024 A...	Unpublished		
ALL DAY EVERY DAY	Every Day All day			
Happy Hour	Every Day (5:00 PM - 6:00 PM) [xMTWTxx]			
11:00am-12:00pm Mon-Fri	6/12/2023 - 6/12/2023 (11:00 AM - 12:00 PM) [Weekdays...			
2:00pm - 4:00pm Mon-Fri	Weekdays (2:00 PM - 4:00 PM)			

Setting the surcharge amount

The surcharge itself is a simple adjustment, tied to the schedule you just built.

9 Open Adjustments and insert one

From POS Management, open **Adjustments**, then select **Insert** from the toolbar and choose **Simple Adjustment** from the list.



What type of adjustment would you like to make?

- A simple adjustment**
Adjustments like percentage or value discounts and surcharges, complimentary or even cover charges
- Buy X items for \$**
Useful for deals where the customer purchases multiple items from a specific type or group of items for a fixed specified amount
- Buy X of the same PLU for \$**
Useful for deals where the customer can purchase multiples of the same PLU for a fixed amount, where that amount varies from PLU to PLU. Prices can be managed per PLU accordingly
- Buy X and receive Y for free**
Configure which items a customer needs to purchase in order to qualify for free items of your choosing
- An integration related adjustment**
Used by integrations like credit card interfaces, remote ordering interfaces and so on

Cancel

10 Name it and set the percentage

Enter the name of the adjustment, choose the reward method, set the percentage surcharge, and turn the three options on.

The screenshot shows the 'Public Holiday Surcharge' settings page. The left-hand menu has tabs for General, Schedule, Service Modes, Permissions, and Reward Rounding. The 'General' tab is selected. The main area contains the following fields and options:

- Name:** Public Holiday Surcharge
- Receipt Text:** Public Holiday Surcharge
- Reward Method:** Percentage Surcharge (with an information icon)
- Percentage:** 10.00
- Maximum Amount:** 0.00 (with a note '0 for no limit')
- Include Child Products?:** Yes (checked)
- Enabled?:** Yes (checked)
- Apply Automatically?:** Yes (checked)
- Sort Order:** A-Z (with a 'Configure Sort Order' link)
- Applies to:** All Items (with a search icon and a note 'Including All Items')

The bottom toolbar includes icons for Delete, Managed by (Domain Group), Customer, Predefined Periods, Save, and Cancel.

11 Restrict it to the Public Holidays schedule

Go to **Schedule** in the left-hand menu, turn on **Restrict usage to specific periods**, and select **Public Holidays**.

If no schedule is offered here, create one first: either **Periods** in POS Management or **Predefined Periods** in the toolbar, then **Insert**.

The screenshot shows the 'Public Holiday Surcharge' settings page with the 'Schedule' tab selected. The main area contains the following fields and options:

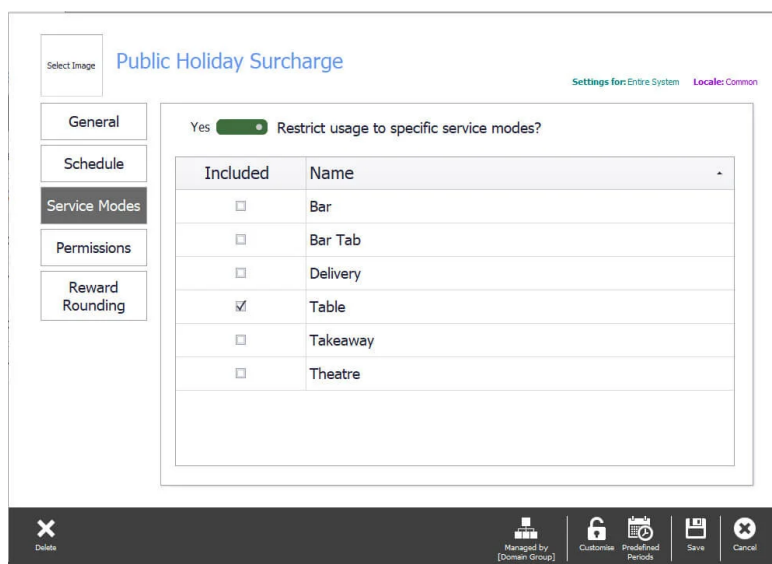
- Restrict usage to specific periods?:** Yes (checked)
- Included:** A table with a checkbox and a 'Name' dropdown.

Included	Name
☐	11:00am-12:00pm Mon-Fri
☐	2:00pm - 4:00pm Mon-Fri
☐	ALL DAY EVERY DAY
☐	Happy Hour
☒	Public Holidays

The bottom toolbar includes icons for Delete, Managed by (Domain Group), Customer, Predefined Periods (highlighted with an orange box), Save, and Cancel.

12 Choose the service modes

If the surcharge should only apply to certain service modes, turn the toggle on and pick them. Left off, it applies to every service mode.



Public Holiday Surcharge

Settings for: Entire System | Locale: Common

General

Schedule

Service Modes

Permissions

Reward Rounding

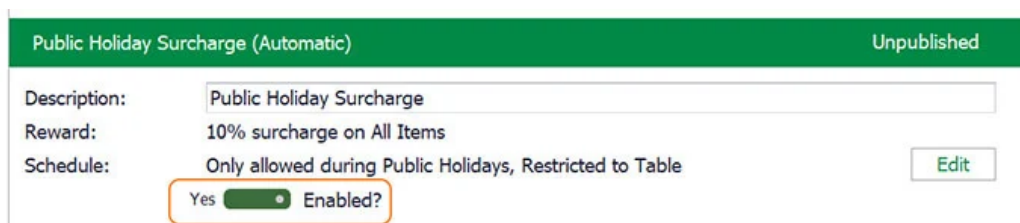
Yes ☒ Restrict usage to specific service modes?

Included	Name
☐	Bar
☐	Bar Tab
☐	Delivery
☒	Table
☐	Takeaway
☐	Theatre

Buttons: Delete, Managed by [Domain Group], Customise, Predefined Periods, Save, Cancel

13 Enable and save

Save your settings, then on the final screen toggle the schedule to enabled and select **Save**.



Public Holiday Surcharge (Automatic) Unpublished

Description: Public Holiday Surcharge

Reward: 10% surcharge on All Items

Schedule: Only allowed during Public Holidays, Restricted to Table

Yes ☒ **Enabled?** Edit

14 Publish

Publish the new adjustment out to the POS.

Checking it on the POS

15

Add today to the schedule and ring up an order

To see how the surcharge looks, add today's date to **Public Holidays**, publish it, and start an order on the POS. The surcharge calculates on the bill.

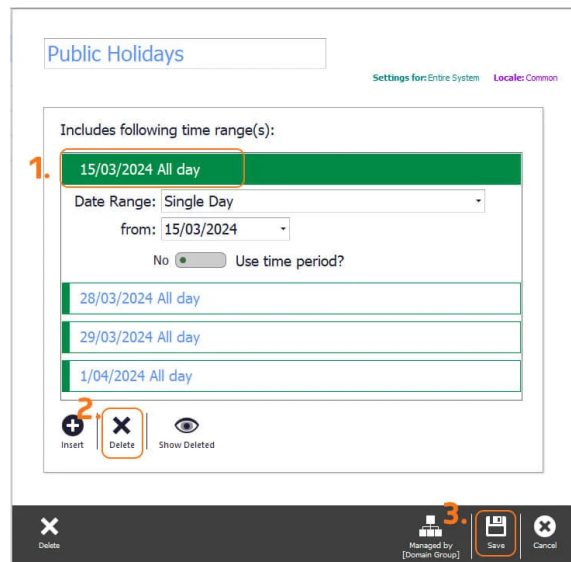
1 x Pumpkin Ravioli		
Table		COVERS
12		0
Kym Hart		9:54 AM
Qty	Amount	
01 9:52 AM - Kym Hart		
1 Marinated Fetta		\$8.00
1 Minestrone		\$20.00
1 Pizza Bianca		\$9.50
01 9:54 AM - Kym Hart		
1 Pollo Toscana		\$30.00
1 Penne con Pollo		\$30.00
1 Pumpkin Ravioli		\$25.00
No Selection		
Public Holiday Surcharge		\$12.25

CAUTION Take the date back off straight away

While today's date sits in the schedule, every customer is charged the surcharge. Remove it as soon as you have seen it work.

16 Remove the date and publish

Select the date, select **Delete**, then **Save**. Publish again so the POS loses it too.



17 Need a hand? Contact Triniteq Support

NEED A HAND? CONTACT TRINITEQ SUPPORT

Phone **1300 784 276**

Email **support@triniteq.com**

Our support team is here to help.