



## Harbortouch POS Frequently Asked Questions

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## **General**

### **Does Harbortouch integrate with 3rd party software?**

Harbortouch is a support based business that invests equipment into the merchant's business with the goal to improve profitability and ensure their continued success. Harbortouch's software offers the flexibility to support third-party integrations in order to deliver customized solutions that meet each of our customer's unique business needs. If you have a company in mind that is looking to work with us, please have them fill out the form found here: <https://www.harbortouch.com/developers>

### **Does a Harbortouch POS system perform recurring billing?**

Harbortouch offers Authorize.Net which can independently manage recurring billing. Harbortouch POS customers using Authorize.Net would pull their processing reports from Harbortouch Online.

### **Does Harbortouch integrate with Quickbooks Accounting Software?**

Harbortouch POS merchants can export all reports in .xls or .csv formats. Quickbooks changes the methods available for importing data from version to version.

### **Can you erase previous sales data? How far back are past sales tracked?**

All Harbortouch POS products provide infinite reporting history. The local data is constantly synced with a cloud based database through Harbortouch Online. If a merchant's business generates an uncommonly large database of sales the information can be archived into smaller databases for reporting purposes.

### **Can we setup a stage only file with a competitor \*POS Company\*?**

You would need to contact that POS company to ensure that they are compatible with TSYS. If they are compatible, we would be able to set up a stage only file for the merchant account.

### **Do we have an ETA on when HarborPay will be available?**

As of this time, we do not have an ETA on when HarborPay will be released. It is currently in Beta.

### **Can a merchant run two different POS software types at one location?**

Two software products such as HT Hospitality and HT Retail could operate on the same network at a merchant's location. The products would operate independently and would both require separate end of day procedures. The sales, employees, menu, and other data would be available for each product on Harbortouch Online. Typically, underwriting will require two separate MIDs to account for both software types. In most cases, running two types of software in one locations is not recommended.

### **What options does the merchant have at the end of their 3/5 year POS Service Agreement?**

The service agreement is meant to establish an ongoing relationship with the merchant and Harbortouch. At the end of the 3/5 years the merchant should let the service agreement auto-renew if they are happy with their system, and if they are not happy they should contact support well before the service agreement expires to see what options are available for getting new equipment. Many merchants are automatically upgraded during the normal course of business once they encounter an issue with their current POS system. This is explained in more detail in the following link:

[http://s3.amazonaws.com/Harbortouch\\_Files/ServiceAgreementFAQ.pdf](http://s3.amazonaws.com/Harbortouch_Files/ServiceAgreementFAQ.pdf)

**How do you export a menu/inventory from another POS system?**

We're not familiar with "competitor POS software", so you may need to contact the competitor's support to get this accomplished. HT will need the menu or inventory in an excel format, or legible menu. During the Order Administrative process, we will review with the merchant what exactly will be needed for their business. Our programmers will be able to work with the merchant to ensure the menu or inventory is programmed to the merchant's expectations.

**Can you view multiple locations from Lighthouse?**

With Lighthouse 4, you will be able to select which locations reporting you would like to view. To view multiple locations on Lighthouse, you will need to login. Once logged in, navigate to Reports at the top of the screen. You will be able to select a drop down and select which locations you would like to pull a report on. Select Generate and you will see the report reflecting the information for the selected locations.

## **HT Hospitality**

### **Will a 3rd party printer work with Harbortouch (HT) Hospitality?**

One of the highest values of having a Harbortouch system is we ensure all of our hardware is compatible. We cannot guarantee the compatibility of 3rd party hardware and we cannot support the hardware. If the merchant purchases the printer from a 3rd party, Harbortouch does not warranty that printer. The merchant will either need to purchase a printer from Harbortouch or pay the monthly service fee and then Harbortouch can provide the merchant with a printer and ongoing support.

### **Does Harbortouch Hospitality integrate with a third party liquor control system?**

Currently the answer is no. Harbortouch will integrate with third party draft and liquor control systems in the future. An announcement will be made when the integration is available.

### **Does Harbortouch Hospitality handle delivery orders?**

HT Hospitality has many built in features for delivery. First, if the merchant has low volume delivery, the order taker can transfer the ticket to the driver using the List View function. Once the ticket is transferred, it will automatically print the delivery information on the guest check. For high volume delivery, we can setup the remote printout to print a barcode. When a driver is ready to deliver the food, the order taker can scan the barcode and it will automatically transfer the ticket to the driver. When the ticket is transferred to the Driver, it will track the sales and tip information.

We also have the ability to set "promise times" for a particular section. The remote ticket will have a "Promise Time" which will let the kitchen staff know when an order needs to be completed. Also, the system will show the time the order was placed and the time that was promised. This will give a manager greater ability to manage their delivery times. Harbortouch Online Ordering (HOLO) and delivery work intuitively with each other. Once the order is submitted online, it will print an alert at a printer the merchant specifies and populate a ticket on the screen. The ticket can be transferred to the driver if it's a delivery order.

The merchant can also set up Delivery Zones in online ordering which will surcharge specific amounts based on the location of the delivery. The customer can also conveniently pay for a delivery order online. This eliminates the customer from giving sensitive card information over the phone. Many of these features are not as self explanatory as they are in QSR & Delivery. These features will require training for the merchant to ensure they understand all the delivery concepts in Hospitality.

### **Does Harbortouch Hospitality have a loyalty feature?**

Harbortouch Hospitality does have the ability to track loyalty points for customer purchases. There is a report available that shows all of the customer's details as well as their points earned/used which can be exported and used for the merchants needs, such as mailing lists for marketing purposes. Harbortouch does not currently have a built in marketing tool that will email customers directly. Harbortouch does have the ability to import customers as long as they are sent to us in an excel format.

### **Does Harbortouch Hospitality have marketing features?**

All Elite software contain a customer database which can allow the merchant to export and use the data for their needs. Harbortouch does not have a built in marketing tool for HT Hospitality.

**Can I export reports directly to Quickbooks?**

To import reports into Quickbooks, the merchant will need to export the reports into an Excel or .CSV file, then import that file to Quickbooks. At this time there is not a direct import option from the software itself.

**What inventory features does Harbortouch Hospitality contain?**

HT Hospitality has 2 inventory management features that can be used on all menu items, just not retail items. First, the Fresh Sheet will allow us to keep track of the Quantity on Hand (QoH). The merchant will enter their current QoH and when they sell the item, it deducts from the Fresh Sheet. The Fresh Sheet can be edited at any time so when your merchant receives a new shipment, he/she can account for new items. The Fresh Sheet will not account for any ingredients or modifiers added to the base item. Secondly, HT Hospitality contains "Item Sales" and "Product Mix" reports. These reports break down the amount of times an item has been sold during a specific date range. This can give the merchant a snapshot of their most and least popular items during a specified date range.

**Does Harbortouch Hospitality have a POS that supports pool/billiards times?**

Yes, this can be accommodated with the section timer feature. There is a detailed video on this feature available on our training platform:

[https://s3.amazonaws.com/Harbortouch\\_Files/Training/Videos/SectionTimer.mp4](https://s3.amazonaws.com/Harbortouch_Files/Training/Videos/SectionTimer.mp4)

This will allow the user to track how long a customer has been at a particular pool table. The billing and pro-rate would all be handled by ringing in different items onto the ticket. We can make a category with different buttons with 15 minute increments and you can price them with whatever pricing the merchant would charge for that timeframe. Please review the video for details.

**Can we transfer loyalty information from another POS to Harbortouch Hospitality?**

We are able to transfer the customer's information to HT Hospitality with an Excel document. We would be able to transfer the customer's name, phone, email, address, phone, birthday, and anniversary. We aren't able to transfer any loyalty points or redemption information into HT Hospitality. Also, if the merchant has a current gift card program, we may be able to transfer the customer's balances over to the HT Gift Card System. The merchant would need to send us a gift card and our Gift Card Department will test it for compatibility with Harbortouch.

**Can Harbortouch Hospitality be used in place for a hotel/lodging solution?**

At this time Harbortouch does not offer a POS system which targets hotels and the lodging industry. If the business is looking for a simple solution to run credit card sales, then they might be a good fit for HT Echo. If they need more features than what is offered on HT Echo, then they might be a good fit for HT Hospitality. It's important to keep in mind that HT Hospitality was designed to make a restaurant or bar more efficient and does not have Property Management Software integration or capabilities.

## **HT Retail**

### **Does Harbortouch Retail work with an inventory scanner?**

Yes. We recommend the Honeywell Dolphin 6100 & Honeywell Dolphin 6500, along with our HT Inventory App for your phone. The inventory scanner or data collector is a tool that assists a business in performing an inventory count. Please keep in mind that this is not used for adding new items to the system, but is used to update the quantity on hand (QoH) of existing items. This is to be used in conjunction with the Inventory Count feature in the HT Retail software by connecting the data collector via the USB cable, then loading the list of inventory items from the POS station to the data collector. After each item is scanned in the warehouse, the data collector will be connected to the POS station again via the USB cable, then the variance is applied to the system. The variance is the difference between the QoH that the software expected and the physical QoH from the data collector.

### **Can you print labels with Retail?**

You will be able to print labels through HT Retail. The merchant would need to purchase a Zebra LP 2824+ or the Dymo Labelwriter 450/450 Turbo. The labels will then print out to these printers.

### **Does Retail have loyalty and rewards?**

HT Retail has a reward system built in. You will be able to award a percentage discount, not a dollar amount. Example: If a customer accumulates 250 points, they will receive a 25% discount.

### **Does Retail integrate with a merchant's online store?**

With HT Retail, there would not be a direct integration with their online store. Any sales performed online would need to manually be entered into the POS station. The merchant would be able to create a payment type called Online Sales, then manually enter the inventory and amount collected for that sale. Once the sale is completed, the merchant will see this sale reflected within their reporting.

### **Can you import and export customers?**

Customers can be exported in a Excel or .CSV file with HT Retail. During the programming phase of the order, the merchant will be able to fill out an import sheet which will allow Harbortouch to easily import customers into the system.

### **Can Retail work with consignment?**

HT Retail can work with consignment. The merchant builds queries to customize their reporting and reflect information that they would like to view on the report. Consignment inventories require an attribute in order for the consignment items to be tracked with the appropriate MemberID for the Consignee. Consignments are manually set on each individual inventory item. When you submit the consignment inventory for programming, this will be specifically outlined on the template.

### **Can Retail utilize a scale?**

HT Retail will be able to integrate with the CAS-PD-II scale offered through Harbortouch. The scale can read up to 30 lbs or 60 lbs, depending on the functionality the merchant needs.

### **Does Harbortouch Retail handle random weight barcodes?**

These types of labels are called Random Weight Barcodes and are typically used in a deli or butcher shop where the employee weighs the item, prints a label with the weight and price, and the POS is able to understand the barcode and input the item/price when it is scanned. Harbortouch does not have a



preferred label scale because this is a 3rd party setup. As long as the scale prints either EAN 13 or UPC-A barcodes, it will work with HT Retail and our scanner. Also, these types of scales do not directly sync with the POS station. The merchant will need to program both the scale and POS separately. The best way to ensure if the scale or label printer is compatible with HT Retail is to send us sample labels and we can test them at headquarters.

**Is the Harbortouch Retail Software EMV compatible?**

The HT Retail software is able to work with the PAX SP30 PIN Pad to accept EMV transactions.

**Can Harbortouch Retail work with a gas station?**

HT Retail will allow us to create Quick Launch buttons so the merchant can calculate the price a customer should pay based on the amount of gallons that were purchased. HT Retail cannot control the pay at the pump operation and does not replace the functionality of a "site controller".

## **Harbortouch Bar & Restaurant**

### **Can HBR be used with Tableside?**

Yes, with Harbortouch Bar & Restaurant, the merchant must utilize Galaxy s2 tablets to run Tableside. Please keep in mind that Harbortouch does not supply the tablets. Other Android tablets will be available in the future and will be announced when available.

### **Does HBR work with Online Ordering?**

Yes, Harbortouch Bar & Restaurant is able to utilize Online Ordering (OLO) through Lighthouse. The merchant will need to activate OLO through Lighthouse. The merchant will be able to customize their online website through Lighthouse, as well as customize what menu items will appear on the website.

### **Does HBR work with Reservations?**

Yes, with Harbortouch Bar & Restaurant, the merchant can utilize Reservations through the software itself, or through Lighthouse. There would be no additional charge to the merchant for utilizing this service. To enable Reservations, the merchant will log into Lighthouse, select Locations, then select Reservations. This will allow the merchant to create a reservation, view the calendar for future and previous reservations, create reservation blocks, and review settings applicable to Reservations.

### **Will we be supporting a Kitchen Video System (KVS) on HBR?**

The KVS is fully functioning on Harbortouch Bar & Restaurant at this time. The KVS is new and improved - it runs off of an Android platform and is plug & play.

### **Does HBR work with 3rd party vendors?**

At this time, we cannot integrate with a 3rd party vendor. We will be releasing the Harbortouch Marketplace in the near future that will allow the merchant to view applications that will work with our POS system.

### **Does HBR work with Caller ID?**

Harbortouch Bar & Restaurant does integrate with our Caller ID. This would need to be purchased through Harbortouch if the merchant would like to utilize Caller ID.

### **Will EMV be available for HBR upon release?**

Harbortouch Bar & Restaurant will be EMV ready upon release utilizing the PAX SP30 PIN Pad.

### **Does HBR have a pre-authorization feature?**

Yes, credit card pre-authorizations are currently working with Harbortouch Bar & Restaurant.

### **What are the hardware specs for HBR?**

Harbortouch Bar & Restaurant will run on the Elite III. The Elite III features a capacitive touch screen, customized Android operating system, optimized motherboard ports for simpler cable management, and an ARM processor which runs quieter and cooler to last longer.

### **Does HBR have timers for pool halls?**

At this time, Harbortouch Bar & Restaurant does not have section timer functionality. This may be implemented in the future and we will send out an announcement once it is finalized.

## **HT Salon & Spa**

### **Does Salon & Spa work with text message reminders?**

Text message and email reminders are available on Salon & Spa through 3rd party applications called Twilio or Clickatell. The merchant must sign up for one of these services and enter the API key, username, password, and telephone number into Lighthouse under Advanced Settings > Text Message Settings. The text message reminders will send a text to the customer 24 hours and 4 hours before an appointment.

### **Does Salon & Spa contain an online booking module?**

Yes, Salon & Spa has two options for customers to book appointments online. First, your customer can create a website directly through the Back Office on Lighthouse. This will allow the merchant to input basic website information that will be reflected on the website. The merchant will also be able to input a message or an about section for the main page of the website. The merchant will have the ability to format the content using the formatting bar that is available. This will also have a section to enable online booking. Once enabled, the site will auto populate employees assigned services, work schedule, and availability to the booking section. Second, the merchant can add a piece of HTML code that's supplied by Harbortouch and post it on their current website.

### **Can employees adjust their schedule remotely?**

The employees would be able to view/adjust their schedule remotely through the Back Office if they have the appropriate permissions. The employee(s) would also be able to adjust their appointments through the calendar if they have permissions to view this. If the merchant does not want to provide the employees with Back Office permissions, the schedule will be able to be exported in an Excel format and printed.

### **What types of businesses does Salon & Spa work with?**

Salon & Spa software current targets hair and nail salons, spas, tattoo parlors, and pet groomers. Please speak with Underwriting or your RM for approval if the potential merchant does not fall under one of these target markets.

### **Does Salon & Spa have Quickbooks integration?**

Yes, Salon & Spa's Back Office has a direct Quickbooks integration to Quickbooks Online.

### **Does Salon & Spa have the ability to do memberships with recurring payments?**

Salon & Spa has a built in loyalty platform which allows the business to add points to a customer profile based on the amount of sales performed. Recurring payments within the membership platform will be available in the near future.

### **Can you import customers to Salon & Spa?**

Salon & Spa has the ability to import and export large amounts of data utilizing an Excel spreadsheet. Harbortouch will forward the data template which the merchant will fill out with their information such as products, services, and employees.

**Does Salon & Spa allow a business to enforce a cancellation policy and charge the customer for not showing up?**

Ensuring a guest shows up for an appointment is an understandable concern in the beauty industry. In fact, industry research has shown that a business can lose thousands of dollars per year due to guests not showing up for their appointment(s). Salon & Spa has features that will help the business confirm and remind a guest of their upcoming appointment. The Appointment Report allows the business to view all appointments during a desired date range and mark the appointment confirmed once a customer has been contacted. Storing credit card information and charging for a service not rendered carries a high risk with credit cards. These policies promote chargebacks and can result in the card associations preventing the business from accepting credit cards in the future.

**Is EMV available for Salon & Spa?**

EMV comes standard with HT Salon & Spa through the PAX SP30 PIN Pad.

**Does Salon & Spa use multiple MIDs to pay the stylists?**

Many stylist and salon owners have accepted credit card payments on a standalone credit card terminal, which deposits the stylist's earnings directly into their bank account using multiple merchant accounts or MIDs. Harbortouch has decided that each location will be under one MID and the business can use the powerful reporting to reconcile what is owed to each stylist. This adds multiple advantages for the salon owner and stylists. In the past, when a salon hired a new stylist, they needed to open a new MID which was less than ideal for the business because they had to wait for the account to open and download the data to the terminal after approval. Also, the multiple MID approach was difficult for the salon owner to keep track of sales because reporting was not integrated on the terminal. HT Salon & Spa uses extremely robust reporting to determine the amount owed to each stylist regardless if the business uses an employee, commission, or booth rental model. These reports are available on the POS system and available on Harbortouch Online. Also, the salon owner can easily view cumulative sales information on Harbortouch Online or the POS station.

## **HT QSR & Delivery**

### **What is the difference between QSR & Hospitality software's?**

HT Hospitality has many built in features for delivery. First, if the merchant has low volume delivery, the order taker can transfer the ticket to the driver using the List View function. Once they transfer the ticket, it will automatically print the delivery information on the guest check. For high volume delivery, we can setup the remote printout to print a barcode. When a driver is ready to deliver the food, they can scan the barcode and it will automatically transfer the ticket to the Driver. When the ticket is transferred to the Driver, it will track the sales and tip info.

We also have the ability to set "Promise Times" for a particular section. The remote ticket will have a "Promise Time" which will let the kitchen staff know when an order needs to be completed. Also, the system will show the time the order was placed and the time that was promised. This will give a manager greater ability to manage their delivery times. Harbortouch Online Ordering (HOLO) and delivery work intuitively with each other. Once the order is submitted online, it will print an alert at a printer the merchant specifies and populate a ticket on the screen. The ticket can be transferred to the driver if it's a delivery order.

The merchant can also set up "Delivery Zones" in online ordering which will charge specific surcharge amounts based on the location (distance) of the delivery. Another feature is the customer can pay for a delivery order online. This eliminates giving sensitive card information over the phone. Many of these features are not as self explanatory as they are in QSR & Delivery. These features will require training for the merchant to ensure they understand all the delivery concepts in Hospitality.

### **Can QSR work with Harbortouch Online Ordering (HOLO)?**

At this time, HT QSR & Delivery will not be able to integrate with HOLO. Any online ordering would need to have a separate tender type setup called Online Ordering, then all sales would need to be manually entered on the POS.

### **Does QSR have the ability to import customers from another database?**

All customers would need to be manually input into the customer database.

### **How can the delivery drivers accept credit card payments?**

The credit card payment will need to be taken over the phone, then processed on the station itself. The delivery driver will then bring the credit card receipt to the customer, have them sign and tip, then adjust the tip when they come back to the restaurant. Alternatively, the merchant could use Charge Anywhere to be able to accept payments at the time of delivery. However, this will not sync up with HT QSR & Delivery reporting and would be reflected on separate reporting.

### **Does QSR have driver tracking and mapping?**

Yes, drivers are able to map their route. This allows the driver to get turn-by-turn directions printed on the receipt printer paper. This will also include the addresses that the driver is going to.

### **Does HT QSR & Delivery work with a KVS?**

HT QSR & Delivery can be integrated with the Harbortouch supplied Kitchen Video System.

**Does Harbortouch QSR & Delivery work with Caller ID?**

HT QSR & Delivery does provide Caller ID integration. The merchant will need a caller ID box. The Caller-ID box will connect to the POS system with an Ethernet cable that will run to the TP-Link router that is provided upon installation. Also, the Caller ID box will need to be hooked into the phone system using a standard phone cable.

**Can we set up delivery zones in QSR?**

In HT QSR & Delivery, you will be able to set up delivery zones by configuring the zones in the database settings. Additionally, you can customize the reimbursement rate per zone as well.

**Does QSR have Lighthouse capabilities?**

All Harbortouch software is compatible with Harbortouch Online. The feature set can vary from software to software. Posted below is the Harbortouch Online Feature set for each software. HT Retail contains four reports and HT QSR & Delivery does not have any POS reports available on Harbortouch Online. Both of these systems allow each report to be emailed from the POS system.

**Do we have a live demonstration of QSR?**

At this time demand for Harbortouch QSR & Delivery demonstrations are low compared to other products and are not being hosted on a regular basis. To request a Harbortouch QSR & Delivery demonstration fill out the opportunity profile as you would for any other product, and a trainer will be in touch to set a demo time.

## **HT Echo**

### **Does Echo have wireless capabilities?**

Harbortouch requires the HT Echo to be connected to the internet with a standard CAT5 Ethernet cable for security and stability.

### **Does Echo come programmed with the menu and/or inventory?**

Typically the merchant will program the menu since the software is geared to be user-friendly. However, Harbortouch can program the menu as long as it's notated on the paperwork that Harbortouch is required to program the menu. The Echo Team will program up to 250 menu items into the software. These items must include the item name, department, price, and any applicable sales tax. Turnaround time is typically 2 weeks from when the order is approved in the Order Administrative process.

### **Does Echo have loyalty and rewards?**

At this time, HT Echo does not have loyalty or rewards built into the system. If the merchant does need this functionality, we work with a strategic referral partner called FiveStars who will be able to send the merchant tablets that their customers can enter their phone numbers and receive text or email rewards and points per purchase.

### **How many retail items can Echo hold?**

There is no hard technical limit on how many SKUs HT Echo can manage because the database is housed on a cloud based server. However, there are practical limitations, right now the HT Echo cannot import SKUs. Each SKU would need to be manually created and scanned in to associate it with an item by the merchant while they're standing in front of the HT Echo station or via Lighthouse. This would be very time consuming and most merchants will not opt to go this route. Harbortouch is working on developing a method for importing items and SKUs, similar to what is done for HT Retail, but there is no ETA on when this functionality will be available.

### **Can Echo work with multiple kitchen printers?**

At this time, HT Echo can only accommodate one kitchen printer per MID. If the merchant requires more than one kitchen printer, HT Hospitality may be a better fit for the merchant.

### **Does Echo have a customer database?**

The HT Echo software has a customer database which will allow you to enter basic information of a customer, such as their name, address, phone number, and email address. The customer database would be used to attach a customer to a ticket for pick-up or delivery orders, or to see how much a customer has spent over a specific time frame. At this time, the merchant would not be able to export or import customers for HT Echo.

### **Can Echo print barcodes?**

At this time, HT Echo does not have the ability to print barcodes. If the merchant needs this functionality, they would be able to use a separate computer software and label printer for this, then scan the barcode on the appropriate item.

**Can Echo keep running tabs?**

With HT Echo, the merchant will be able to put an order on hold, and recall at a later time. Please keep in mind that the merchant would not be able to perform pre-authorizations on cards, so if the merchant needs this functionality, they may be better suited for HT Hospitality.

**Can Echo perform pre-authorizations?**

HT Echo does have the ability to put an order on Hold to recall at a later time, but does not provide pre-authorization functionality. If the merchant needs advanced ticket management, such as pre-authorizations, renaming tickets, and table management, HT Hospitality may be a better fit.

**Can Echo integrate with a KVS?**

At this time, HT Echo would not be able to integrate with a kitchen video system. If the merchant does need this functionality, they may be a better fit for HT Hospitality.