



Refresh POS Data

Quick Start Guide

Document Details

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Overview

The Refresh POS Data functionality enables users to repoll the most up-to-date POS data for any active location with a live Connex integration.



Be Aware: If you are integrated with Connex V3, this process will generate a new file **ONLY** if there is updated POS data that needs to be pulled into Crunchtime.



Be sure to grab the latest version of this document here:

<https://links.crunchtime.com/QS-RefreshPOSData>

OR by scanning the QR code to the left.

Related User Group Permissions

Screen Name	Control Name	Description
NC-Enter Sales Transactions	Refresh POS Data	Enables the Refresh POS Data button on the Recent Sales Transactions screen in Net-Chef.
NC-Labor Detail	Refresh POS Data	Enables the Refresh POS Data button on the Labor Summary screen in Net-Chef.
NC- Menu Mix Report	Refresh POS Data	Enables the Refresh POS Data button on the Menu Mix Report, Consolidated Menu Mix Report, and Consolidated Menu Mix by Reporting Calendar Report in Net-Chef.
Undo and Reprocess Batch Menu Mix Summary	Refresh POS Data	Enables the Refresh POS Data button on the Undo and Reprocess Batch Menu Mix Summary screen in Enterprise Manager.



Refresh POS Data

Overview

The Refresh POS Data button allows you to refresh the sales and time clock data in Net-Chef to align with the data in your point of sales (POS) system. This makes it easy to quickly update the POS data in the instance of a data discrepancy.

Requirements

The following requirements must be met to use the Refresh POS Data functionality:

- The location(s) must have an active Connex integration for sales and/or time clock data.
- The location(s) must be using one of the following POS systems:

Aloha	Nextep	Simphony V2 API
Appetize	Northstar	Simphony V2 OnPrem
Brink	PDQ	Squirrel
Franpos	POSitouch (Time Punch only)	Task
Givex	Qu (Sales and Menu Mix only)	Toast
Micros 3700	Revel (Sales and Menu Mix only)	XPIENT

How Does It Work?

When the Refresh POS Data button is selected, a request is sent to Connex to retrieve the current sales or time clock data from your POS system for the selected dates. The data that is retrieved depends on where in the Crunchtime application the Refresh POS Data button is selected. There are three different types of data that can be refreshed:

1. **Menu Mix** – This file contains check level detail tracking the sales of your menu items throughout the day. Includes data such as quantity, price, server, time, and revenue center.
2. **Sales Mix** – This file contains sales summary information used to create a daily reconciliation report. Gross and net sales, tenders, discounts, and sales tax by daypart may be included.
3. **Time Clock** – This file contains time punch details with employee, position, time in and out, sales and tips, and break indicators.

Once the data is retrieved from the POS, it is uploaded into Crunchtime. The import status of all files can be viewed from the Inbound Integrations screen in Enterprise Manager. All successfully processed files will then update the corresponding data in Net-Chef.



Time to Repoll: The time it takes to repoll data will vary depending on several factors, such as the number of dates/locations in the repoll request and your POS system. Here is a general estimate of the time needed to complete a repoll, depending on your POS type:

On-Premises – Most repolls take about 60 minutes to complete.

API (Cloud) – Most repolls take about 30 minutes to complete.

The times provided above are estimates and may vary between POS systems.





Repoll Sales Data

Single Location

Getting Started

Sales data (Sales Mix and Menu Mix) can be repolled for a single location by selecting the *Refresh POS Data* feature button from one of the following screens in Net-Chef:

- Recent Sales Transactions
- Menu Mix Report
- Consolidated Menu Mix
- Consolidated Menu Mix by Reporting Calendar

Refresh POS Sales Data

Net-Chef > Sales > Recent Sales Transactions

Sales Date ↑	Register	Total Net Sales	OVERRINGS	Complimentary	Bank Deposits	Over/Short	Guest Count	Actions
09/02/2022	FOH	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	View Edit
09/03/2022	FOH	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	View Edit
09/04/2022	FOH	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	View Edit
09/05/2022	FOH	\$8,955.45	\$26.32				286	View Edit
09/05/2022	Drive-Thru	\$275.25	\$0.00				0	View Edit
09/06/2022	FOH	\$7,118.31	\$20.00				253	View Edit
09/07/2022	FOH	\$9,025.84	\$0.00				398	View Edit
09/08/2022	Drive-Thru	\$110.00	\$0.00				421	View Edit
09/08/2022	FOH	\$10,495.84	\$0.00				\$20	View Edit
09/09/2022	FOH	\$10,378.84	\$20.00				398	View Edit
09/10/2022	FOH	\$9,075.84	\$0.00					

- 1 Select the *Refresh POS Data* button.



Setup: Users must have the “NC-Recent Sales Transactions > Refresh POS Data” and/or the “NC-Menu Mix Report > Refresh POS Data” user group permissions enabled for the *Refresh POS Data* button to be visible on the respective screens.

This button will be greyed out at locations that do not have a Connex integration for Sales/Menu Mix data.

- 2 Choose a range of dates to refresh. A maximum of 7 days can be submitted per request. If you are refreshing data for only one day, the *Start Date* and *End Date* will be the same.
- 3 Select *Submit* to begin the process of retrieving Sales and Menu Mix data from your POS system.





Repoll Time Clock Data

Single Location

Refresh POS Time Clock Data

The *Refresh POS Data* feature on the Labor Summary screen enabled you to repoll Time Clock data for a single location.



Warning: Refreshing Time Clock data will overwrite any edits or approvals that were done to the Labor Actuals for the selected dates. You may re-enter edits and re-approve shifts after the data has been refreshed.

Net-Chef > Labor > Labor Summary

Week Ending Date	Last Import Date	Last Edit Date	Last Edit User	Status	Action
08/07/2022	08/09/2022	08/09/2022			Edit View
08/14/2022	08/14/2022	08/14/2022			Edit View
08/21/2022	08/22/2022	08/23/2022			Edit View
08/28/2022	08/29/2022	08/30/2022			Edit View
09/04/2022	09/01/2022	09/01/2022			Edit
09/11/2022					Edit
09/18/2022					Edit
09/25/2022					Edit

Refresh POS Data

Select the date(s) to refresh POS data. A maximum of 7 days can be submitted per request.

Start Date: 09/02/2022

End Date: 09/04/2022

[Submit](#) [Cancel](#)

- 1 From the Labor Summary screen, select the *Refresh POS Data* button.



Setup: Users must have the “NC-Labor Detail > Refresh POS Data” user group permission enabled for the *Refresh POS Data* button to be visible on this screen.

This button will be greyed out at locations that do not have a Connex integration for Time Clock data.

- 2 Choose a range of dates to refresh. A maximum of 7 days can be submitted per request. If you are refreshing data for only one day, the *Start Date* and *End Date* will be the same.
- 3 Select *Submit* to begin the process of retrieving Time Clock data from your POS system.



Note: Refreshed time clock data will be reflected on the Labor Actuals screen in Net-Chef for the selected date(s). On the Labor Summary screen, select either *Edit* or *View* for the corresponding Week Ending Date to see the Labor Actuals for that week.





Repoll Sales Data

Multiple Locations

Getting Started

Sales data (Sales Mix and Menu Mix) can be repolled for multiple locations at once when selecting the *Refresh POS Data* button from the Undo and Reprocess Batch Menu Mix Summary screen in Enterprise Manager.

Refresh POS Sales Data

Enterprise Manager > Interfaces > Undo and Reprocess Batch Menu Mix

CrunchTime! Enterprise Manager

CrunchTime Cafe

1 Refresh POS Data

File Date Range Start: * 08/28/2022 File Date Range Finish: * 09/16/2022 Retrieve Begin Undo Menu Mix Batch

Reprocess Selected Batches Reprocess Files

Select All	Batch Number ↑	Batch Files Start Date	Batch Files End Date	Batch Status	Undo Date and Time	Reprocess Date and Time	Reason for Undo Menu Mix
☐	1	09/11/2022	09/11/2022	Reprocess in Progress	09/16/2022 14:24	09/16/2022 14:25	Recipe Modification
☐	2	09/01/2022	09/02/2022	Undo Successful	09/16/2022 14:24		Incorrect Component Product Setup

- 1 From the Undo and Reprocess Batch Menu Mix Summary screen, select *Refresh POS Data*.



Setup: Users must have the “Undo and Reprocess Batch Menu Mix Summary > Refresh POS Data” user group permission enabled for the *Refresh POS Data* button to be visible on this screen. This button will be greyed out if the organization does not have a supported Connex integration.

(Continued)



Repoll Sales Data

Multiple Locations (Continued)

EM > Interfaces > Undo and Reprocess Batch Menu Mix > Refresh POS Data

CrunchTime! Enterprise Manager

CrunchTime Cafe

6 Submit

2 Start Date: * 09/02/2022 End Date: * 09/03/2022 Select the date(s) to refresh POS data. A maximum of 7 days can be submitted per request.

3 +

Location Code	Location Name	Eligible
300004	304 - Portland	Y

5 <

4

Location Code	Location Name	Eligible
300001	301 - Cardiff	Y
300002	302 - Dubai	Y
300003	303 - Naples	Y

- 2 Choose a range of dates to refresh. A maximum of 7 days can be submitted per request. If you are refreshing data for only one day, the *Start Date* and *End Date* will be the same.
- 3 Select the *Add (+)* icon. The *Add Location* window will slide open.
- 4 Select the *Location(s)* that need refreshed data.



Tip: Hold the CTRL key on your keyboard to select multiple locations at once. Please be mindful that selecting a large number of locations may increase the time it takes to refresh the sales data.

- 5 Drag the selected locations to the left window or use the *Left Arrow (<)* button to move the locations over to the left window.
- 6 Select *Submit* to begin the process of retrieving Sales and Menu Mix data from your POS system.



Warning: All active locations may be selected for a repoll, however only eligible locations (*Eligible = Y*) will have their data refreshed. Locations are eligible if they have an active Connex integration for sales data (Sales/Menu Mix).

Use the *Inbound Integrations* screen to validate that the new POS files have successfully processed. If a file fails to process, this screen can be used to identify and resolve any errors. Once the errors have been resolved you may reprocess the file.





FAQ's

Q: Why is my Sales/Time Clock data still the same?

A: Here are a few common reasons why your POS data may not have updated:

1. Your initial repoll request may not have completed! The timing of your request will vary depending on a variety of factors, such as your POS configuration and the size of your request.
2. There may not be any new data in your POS system. Double-check your POS to confirm all data is up-to-date and accurate.
3. The files may have failed to process through Inbound Integrations. Check the Inbound Integrations screen in Enterprise Manager for failed files and use the Error Report to determine why the file did not process successfully.
4. Your POS system may have an inactive heartbeat (On-Prem systems only). Reestablish the heartbeat to restart the flow of data. Any missing data should flow into Crunchtime shortly after the heartbeat connection is reestablished. If you're still missing data, try refreshing the POS data again.

Q: Can I repoll sales for a posted period?

A: Sales Mix files can be processed for a posted period, whereas Menu Mix files can only be processed for an open (not-posted) period.



Setting: When the “Allow Sales Mix file to import if data is exported” preference in Enterprise Manager is enabled, Sales Mix files can be imported even after sales data has been exported.

Q: What is the difference between Sales Mix and Menu Mix?

A: Sales Mix and Menu Mix files contain unique information and process a little differently. Here's a quick overview:

Sales Mix – This import updates the register sales information on the Recent Sales Transaction screen. Sales Mix files can be used to create new register sales records or update existing records.



Setting: The “Allow Sales Mix File to update existing Register and Date record” preference in Enterprise Manager must be enabled for Sales Mix data will overwrite existing data with new data. In other words, this must be enabled for Sales Mix files to “flush and fill” data.

Menu Mix – This import records recipe sales information on the Menu Mix reports as well as depletes the inventory of the Recipe items and/or Components, according to the Recipe setup in Enterprise Manager. If a subsequent file is processed containing one or more Check Number/Open Time combinations for the same Location and Business Date as a previous file, on a check-by-check basis the system will “flush and fill” the original check data, replacing it with the new check data.

Q: Why do multiple shifts have the same clock out time?

A: When an employee does not have a clock out time on the 273 Time Clock file, Crunchtime will automatically update the clock out time to match when that Time Clock file was uploaded for that date (also referred to as the file's Create Time). If you see this happen, make sure all employees have clocked out in the POS system. If everyone has punched out, try refreshing POS data for this date again.

