BUSINESS plus ACCOUNTING
RESTAURANT DELIVERY

Quick Start Guide

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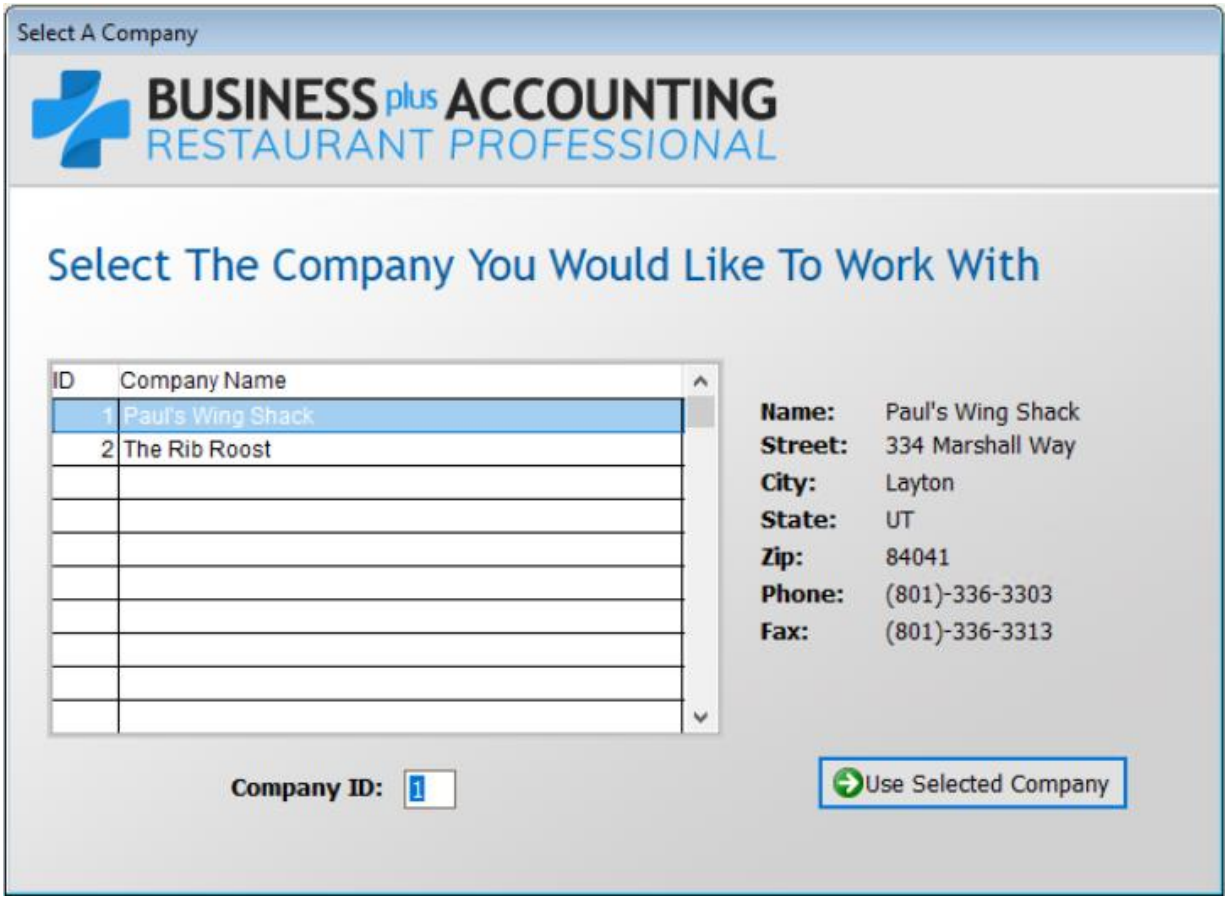
Initial System Startup

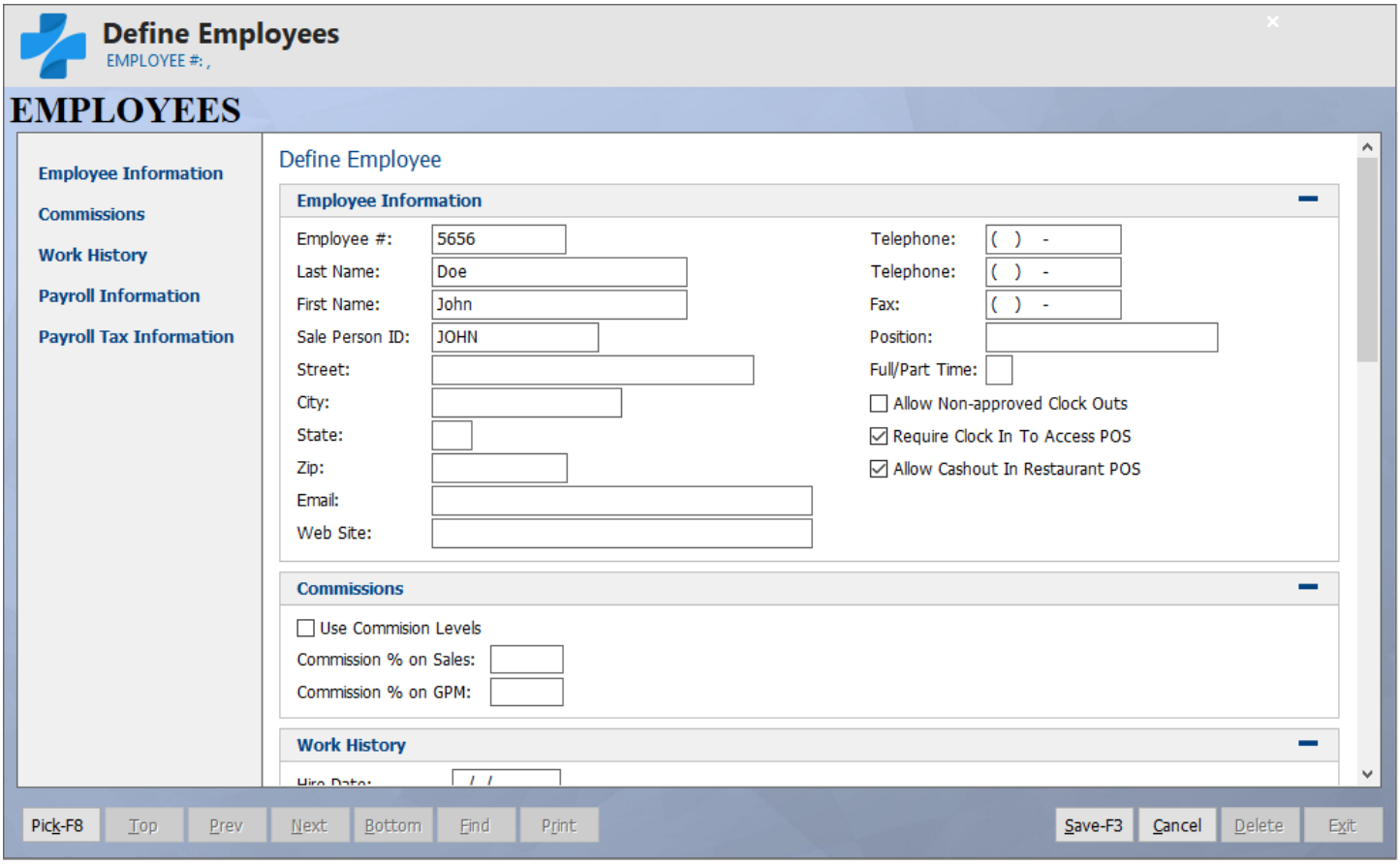
When you initially open the BPA software, you will be asked to enter your company information. At minimum, you should enter your company name. All other information can be entered later by going to Business System →Definitions→Companies→Modify.



Defining Employees

The first thing you should do is create an employee in the system. To do this, go to Restaurant System→Manager Functions→Define Employees→Add. At minimum, you will want to fill out the following fields:

a. Employee # - This is a number that you will define for each employee. Use a unique number that you can identify the employee by.
b. Last Name.
c. First Name.
d. Sale Person ID – When a sale is made in the software, this field will be printed on the customer receipt, indicating who made the sale. We recommend either entering the Employee number, or the first name of the employee.

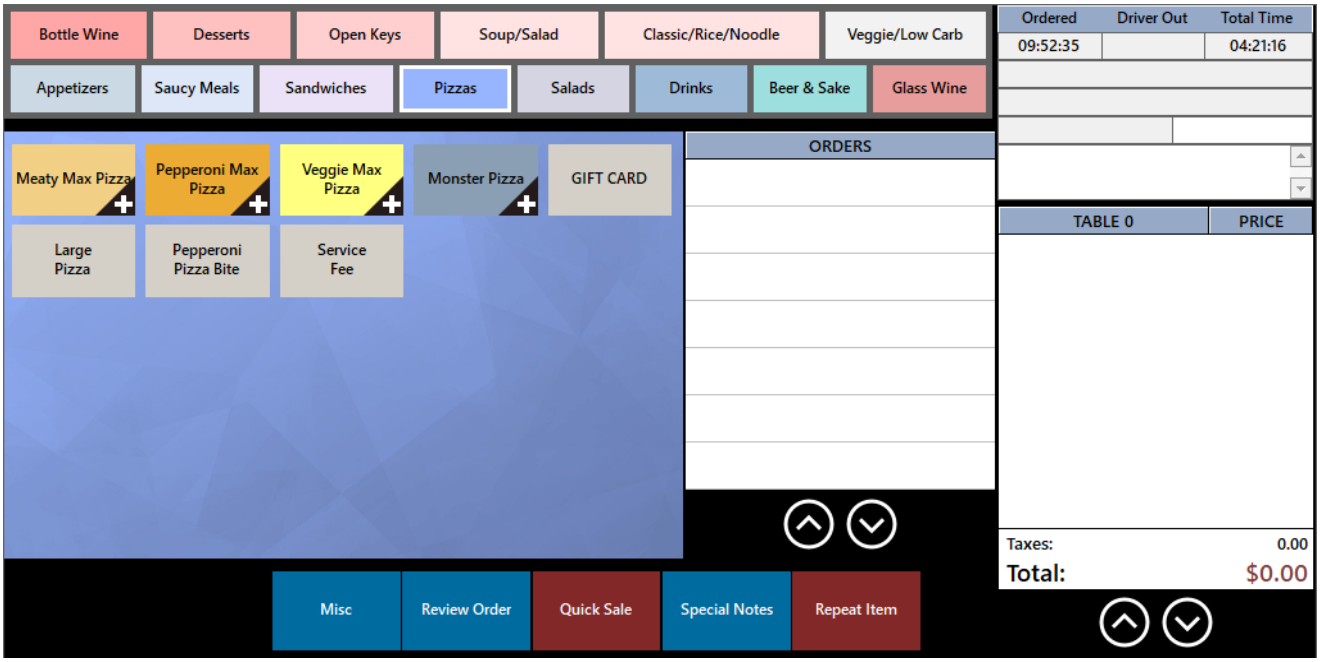


Creating Your Menu

To create your menu, you should perform the following steps:

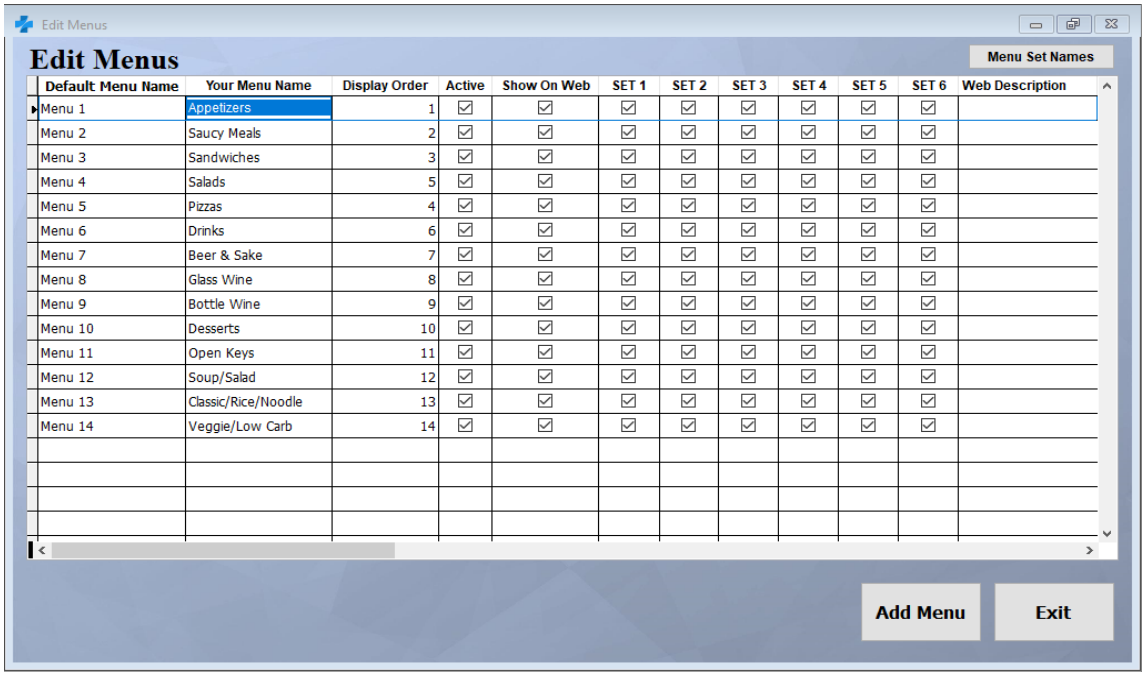
Changing Menu Tab Names

On your restaurant menu, you can have unlimited tabs. The more tabs that you add the less space you will have for menu buttons so try to limit the number of tabs and length of the description.



To change the tab names, perform the following steps:

1. Go to Restaurant System→Manager Functions→Assign Menu Names.
2. Menu sets will allow you to display defined tabs when that set is selected.
3. Change the menu names in Your Menu Name field as needed, then press the Exit.

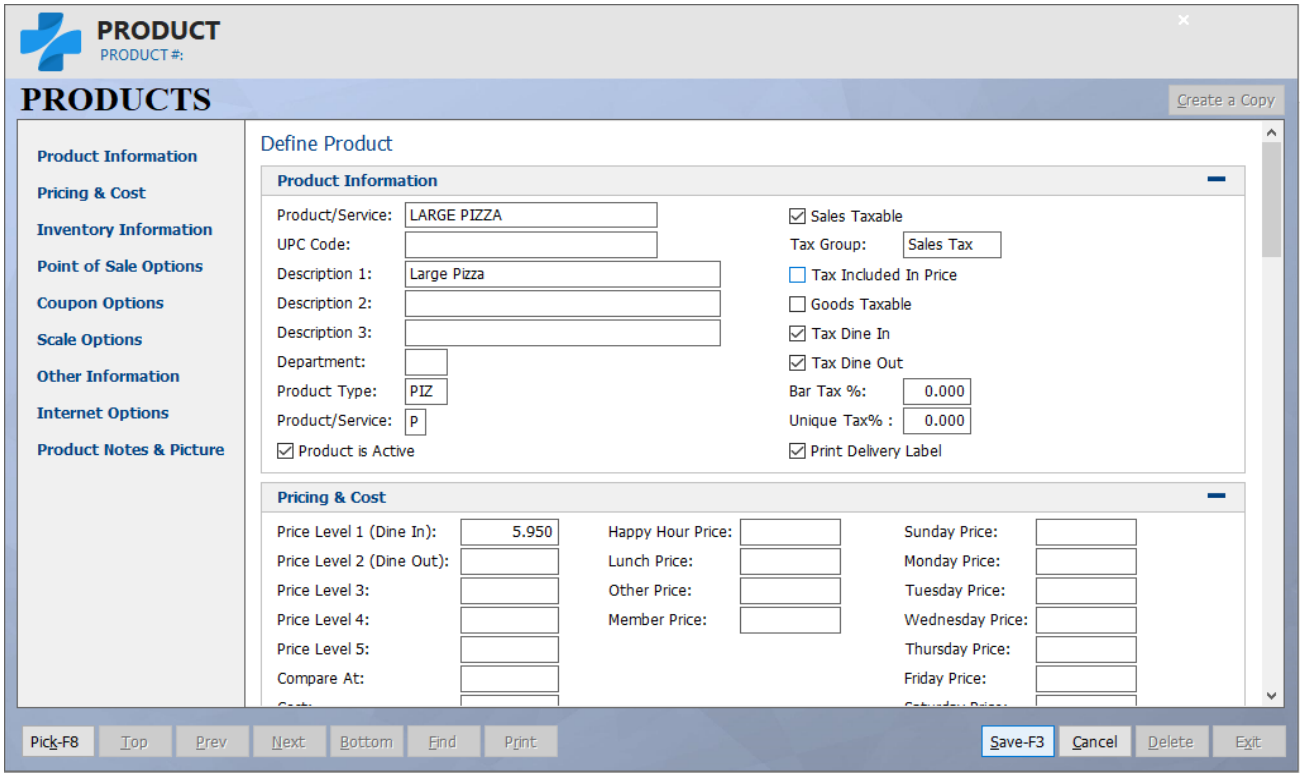


Default Menu Name	Your Menu Name	Display Order	Active	Show On Web	SET 1	SET 2	SET 3	SET 4	SET 5	SET 6	Web Description
Menu 1	Appetizers	1	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 2	Saucy Meals	2	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 3	Sandwiches	3	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 4	Salads	5	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 5	Pizzas	4	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 6	Drinks	6	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 7	Beer & Sake	7	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 8	Glass Wine	8	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 9	Bottle Wine	9	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 10	Desserts	10	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 11	Open Keys	11	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 12	Soup/Salad	12	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 13	Classic/Rice/Noodle	13	☑	☑	☑	☑	☑	☑	☑	☑	
Menu 14	Veggie/Low Carb	14	☑	☑	☑	☑	☑	☑	☑	☑	

Adding Product Information to Your System

Anything that may possibly be sold in the system should be defined as a product. This would include side items and toppings. To create the product record, perform the following steps:

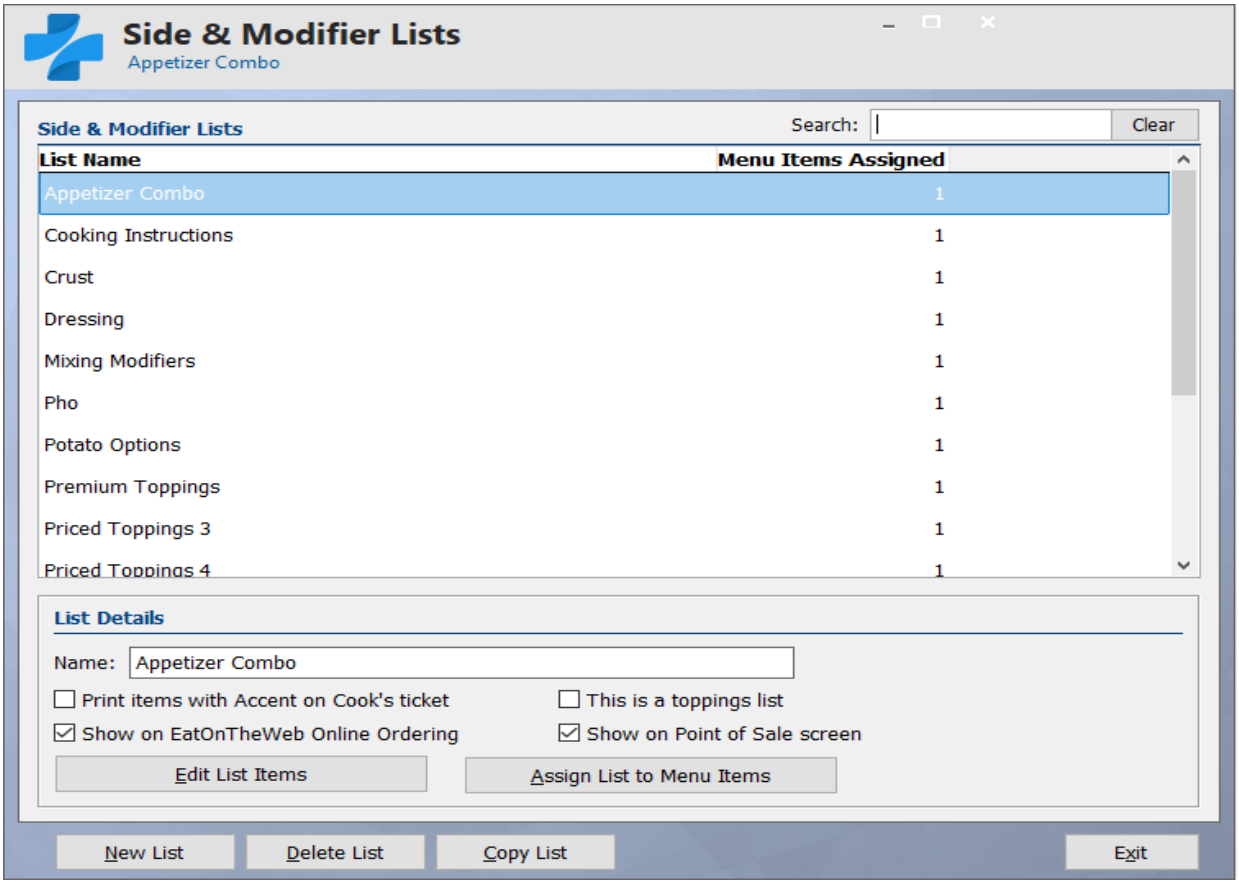
1. Go to Restaurant System→Manager Functions→Define Products→Add.
2. At minimum, fill out the following fields:
    a. Product/Service – This will be the name of the product that you are selling. For example, if you are adding a Large Pizza, you would type "Large Pizza."
    b. Description 1 – Again, this is the name of the product you are selling. This field appears on the customer receipt, so try not to use any abbreviations in this field. If you run out of space, you can use Description 2 and 3.
    c. Product Type – This field allows you to categorize the product for reporting purposes. Using our "Large Pizza" example, you can place this product under the "Pizza" category. Press the F8 key to view a list of categories, then select the appropriate category.
        i. If you need to add an additional Product type to the system, you can do this by going to Restaurant System→Manager Functions→Define Products→Define Product Types.
    d. Sales Taxable – Place a Y in this field if this product needs to be taxed. This will be checked by default.
    e. Price Level 1 – This is the price that you are charging for this product.
        i. NOTE: If the product you are adding is a pizza that will have optional priced toppings added to it, you will want to enter the **base price** of that pizza. In our Large Pizza example, the base price is $10.00. Each additional topping requires an extra cost (defined later in this guide).
3. Press Save when finished.



Creating Side Lists

The next step would be to create side lists. The system allows you to create unlimited side lists. To create a side list, perform the following steps:

1. Go to Restaurant System→Manager Functions→Define Side & Modifier Lists. The system comes with several pre-defined side list names. If these lists apply to your business then click on the list and click on Edit list Items and add the item that you need. If you do not need the default list items then ignore them. Do not delete any of the default lists because the program uses them for reference even if they are not in use.
2. Click the New List button
3. Under list Details enter the name of the list in the Name field, then click on Edit List Items
4. On the next screen, the following fields will need to be entered under Item Details:
    a. Name - This is the text that will show on the button on your menu. For example, if the product was Bacon, you could just enter "Bacon" in this field.
    b. Product ID - This is the name of the topping that you added in Define Products. To view a list of these products, click in the product ID field and then press the F8 key on the keyboard. This will be used to track sales and inventory for that item. If you leave the product ID field blank the item will not be tracked on your reports.
    c. If it is a Non-Priced List then skip step d.
    d. Price – The system allows you to define pricing specific pricing for each item on your list. If this item requires an up-charge on the order, type in the up-charge price here. Otherwise, leave it at 0.
5. Press Exit when finished.
    a. You can also define your Priced Toppings and Non-Priced Toppings lists in this screen which is explained in the next section.

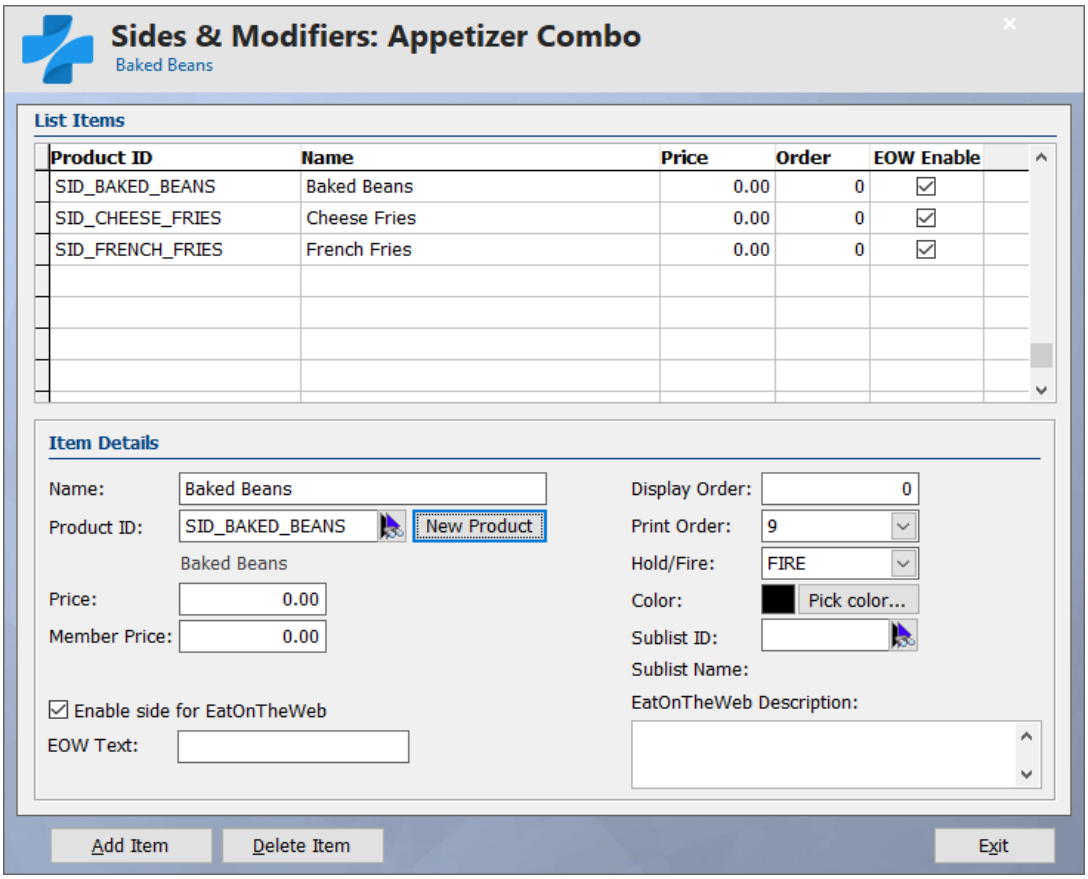


Creating Priced & Non-Priced Toppings Lists

The BPA Restaurant Delivery software allows for unlimited priced & non-priced toppings lists. These lists are used when a pizza/entrée requiring topping is ordered by a customer. To add items to a toppings list, perform the following steps:

1. Go to Restaurant System→Manager Functions→Define Side & Modifier Lists
2. Click the New List button
3. Under list Details enter the name of the list in the Name field, check the box next to the option that says This is a toppings list, then click on Edit List Items
4. On the next screen, the following fields will need to be entered under Item Details:
    a. Name - This is the text that will show on the button on your menu. For example, if the product was Bacon, you could just enter "Bacon" in this field.
    b. Product ID - This is the name of the topping that you added in Define Products. To view a list of these products, click in the product ID field and then press the F8 key on the keyboard. This will be used to track sales and inventory for that item. If you leave the product ID field blank the item will not be tracked on your reports.
    c. If it is a Non-Priced Toppings List then skip step d.
    d. Price/Half Top Price – The system allows you to define separate full and half pizza pricing for your toppings. If this topping requires an up-charge on the order, type in the up-charge price here. Otherwise, leave it at 0.
5. Press Exit when finished.

Non-Priced Toppings Lists are also used in the Per Topping Price Matrix (explained later in this guide).



Define Per Topping Price Matrix

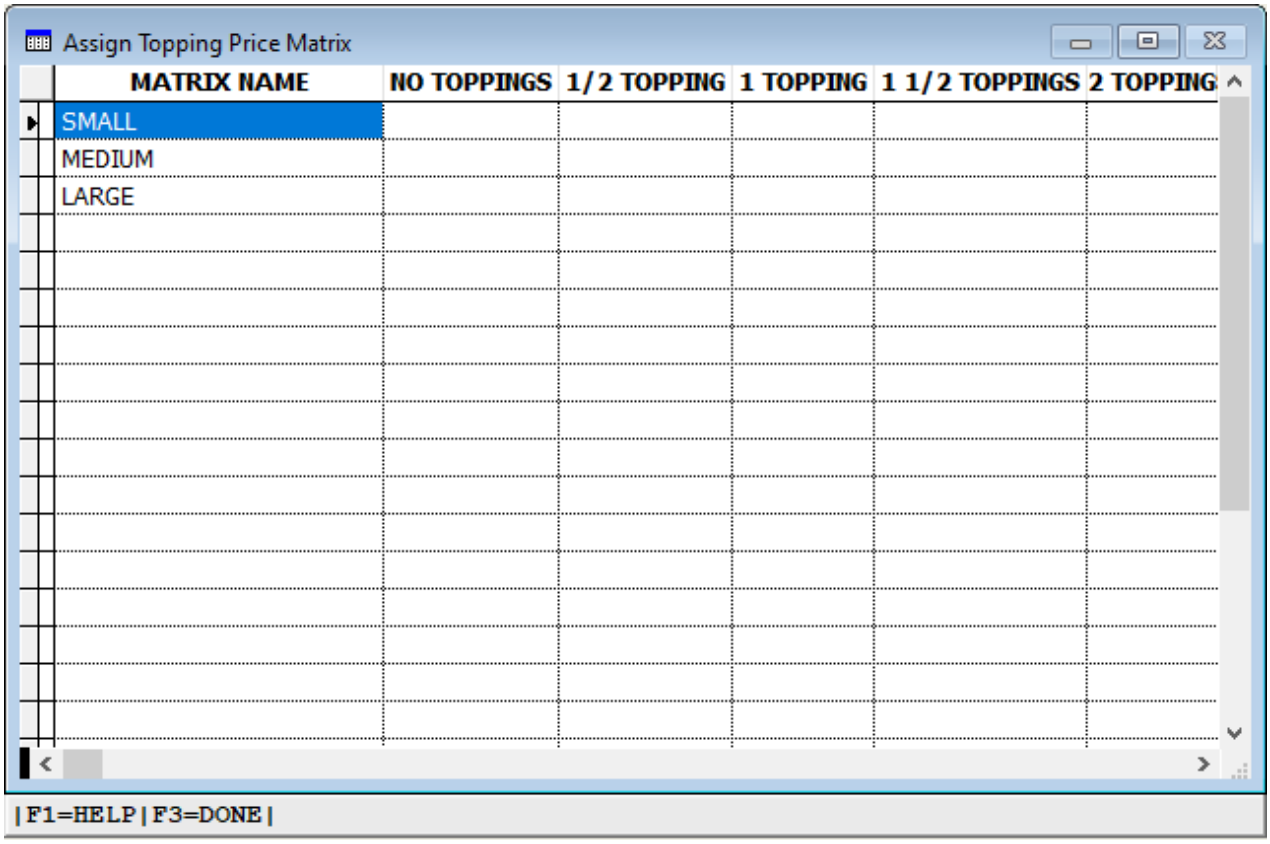
Some restaurants want to make ordering as simple as possible to speed up operations. This is important to the pizza industry because such a large portion of your daily business happens during a short period of time. One way to accomplish this is to use a pricing matrix for each type of pizza you sell (such as Large, Medium, Small, etc.).

An example of a Per Topping Price Matrix would be you sell a large pizza at the base price of $10.00. Each additional topping is $1.00. So, a one topping pizza would be $11.00.

The Per Topping Price Matrix option will be using your Non-Priced Toppings list. Ensure that all of your toppings are entered into this list.

To define the Per Topping Price Matrix, perform the following steps:

1. Go to Restaurant System→Manager Functions→Define Per Topping Price Matrix
2. By default, your system will come with three default pizza matrix sizes – Small, Medium and Large. However, you can add as many different sizes as you like in the matrix.
3. For each matrix, enter the **Additional Price** for each column. For example, if 3 toppings on a Large Pizza requires an additional cost of $3.00, enter 3.00 in this field.
    a. Note: Remember, the base price for each pizza was already defined in Define Products.
4. Press F3 on your keyboard when finished.

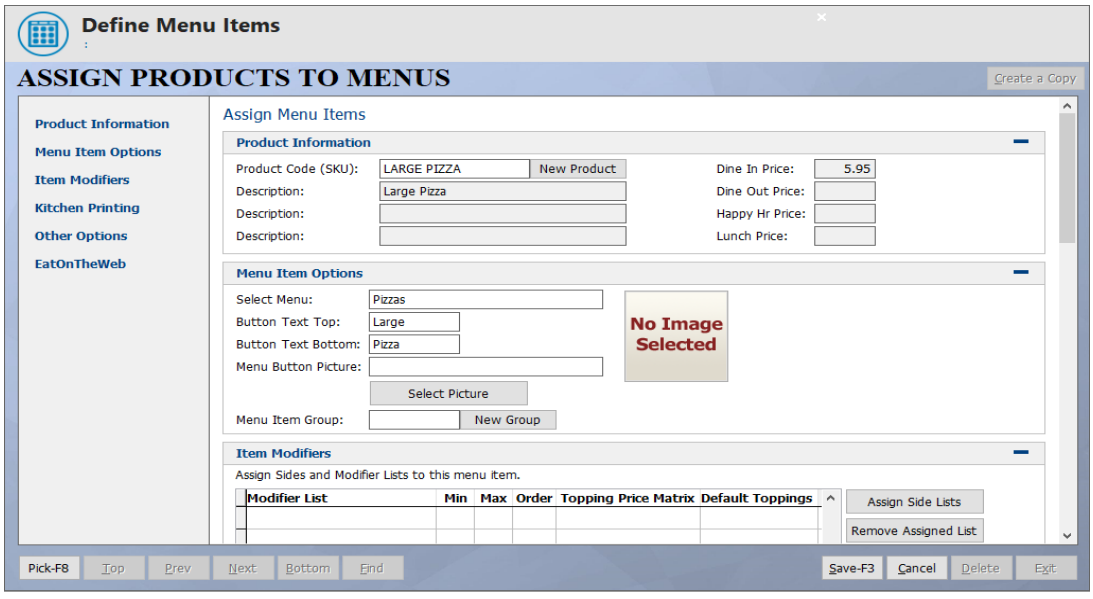


NOTE: Make sure you put a dollar amount for each choice. The system will not charge extra if nothing is defined. For example, if you charge a dollar per topping up to 8 toppings you would have to put $8 for the 9th, 10th, 11th, etc.... topping.

Adding Menu Items (buttons to your menu)

Once you have created all product records, defined side lists, define your toppings lists, and created menu tabs, you can now begin placing products into your menu. To do this, perform the following steps:

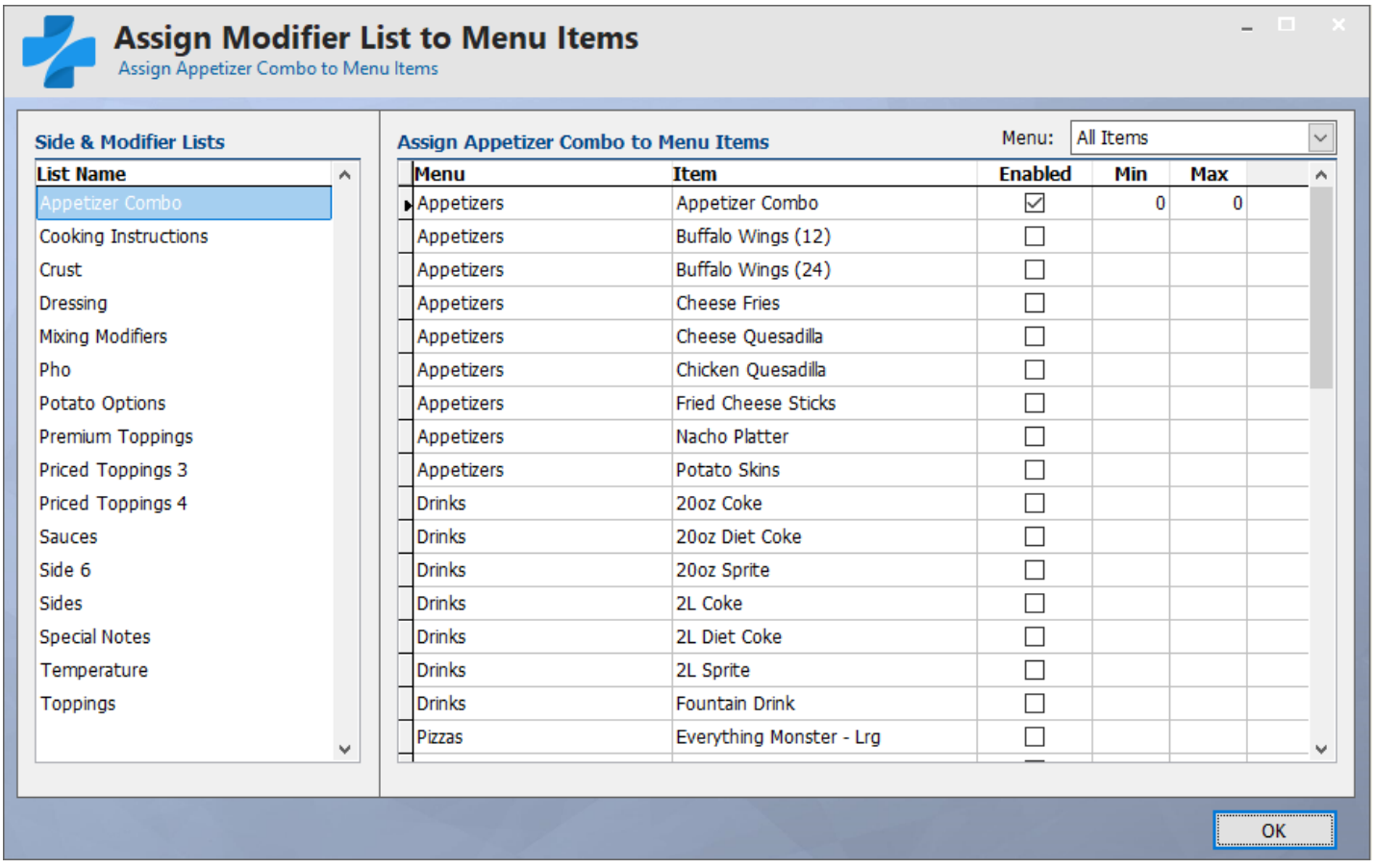
1. Go to Restaurant System→Manager Functions→Define Menu Items→ Click on Add.
2. Enter the following fields:
    a. Product Code (SKU) - This is the name of the product that you added in Define Products. To view a list of these products, click in the field and press the F8 key on the keyboard.
    b. Select Menu – This is where you will place the product in the appropriate menu tab. To view a list of your menu tabs, click in the field select the F8 key on the keyboard.
    b. Button Text Top/Bottom – This is the text that will show on the button on your menu. For example, using our Large Pizza, you could just enter "Large Pizza" in this field.
        i. Each line allows you to type in ten (10) characters. So, if you do not have enough space on the Button Text Top, you can use the Button Text Bottom to fill this space.
    c. Menu Item Group – This is an optional feature which allows you to group several menu items into the same group. Any items added to the group will show up as one button on your menu. Then when the one button is pressed you will see all the menu items in that group and can select them from there.
    d. Item Modifiers – This is where you will select which side list or toppings lists, will appear when the menu item is added to the ticket. Click on Assign Side Lists and check box in the Enabled field to add the list to your menu item.
        i. If you are using the **Per Topping Price Matrix**, perform the following steps:
            1. Select the list that will have a topping matrix by clicking on the lists Topping Price Matrix field.
            2. Press the F8 key on the keyboard which will display your topping matrix list.
            3. Highlight the Price Matrix you want to use, then click Pick This Record.
    e. Kitchen Printing – The system allows for five (5) kitchen printers, and one (1) expediter printer. For example, you can have one printer assigned for your cooks in the kitchen, one assigned for a bar, etc. If the item needs to be sent to the cook, you will want to place a Y next to the appropriate kitchen printer. If you only have one (1) kitchen printer, then you can just put a Y next to "Print on Cook's Printer 1."
3. Press Save or F3 when finished.



Adding Side Lists to Menu Items

If you have created all menu items and need to add side lists to menu items, you can do this easily doing the following:

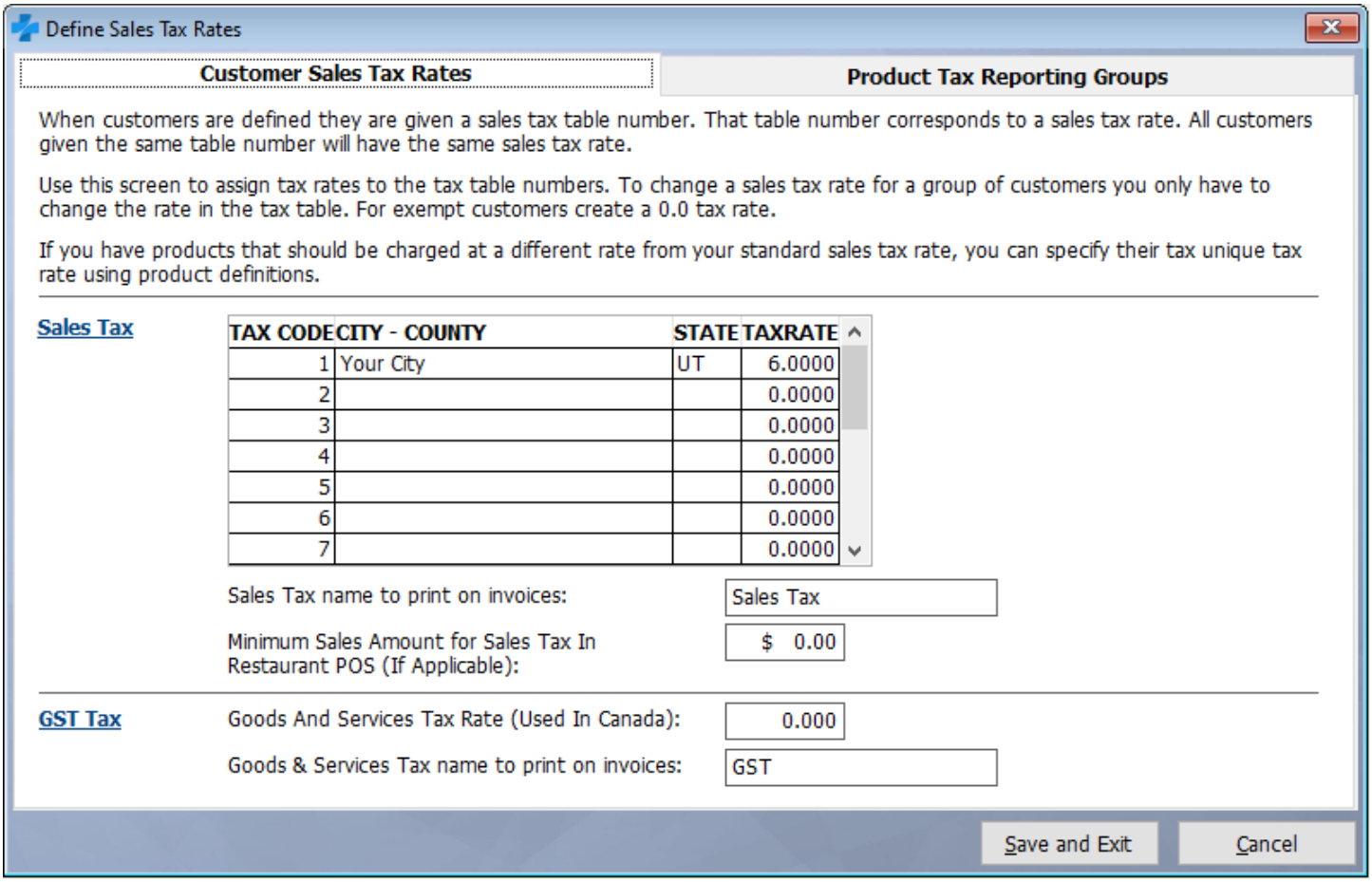
1. Go to Restaurant System→Manager Functions→Define Side & Modifier Lists
2. Click on Assign List to Menu Items
3. This will bring up a list of all the buttons on your menu. You can filter them in the upper right-hand corner under menu by choosing the menu that the buttons are under
4. Under Side and Modifier Lists choose the modifier list that you want to add to the menu item
5. In the Enabled field click on the box by the menu item that you want to add the side list to.
    a. Placing a number in the Min field will require the casher to choose the minimum number of items that you define. Placing a number in the Max field will prevent the cashier from selecting more than the maximum number that you define.
6. Press OK to finish



Adding Sales Tax

To enter your sales tax percentage, perform the following steps:

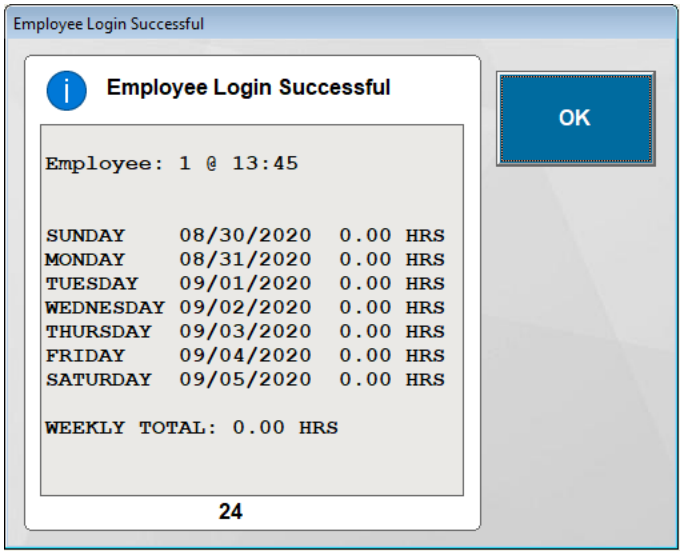
1. Go to Business System→Definitions→Sales Tax Table.
2. Under Tax Code 1, enter your City, State, and Tax Rate.
3. Press Save and Exit when finished.



Clocking In and Out of the Time Clock

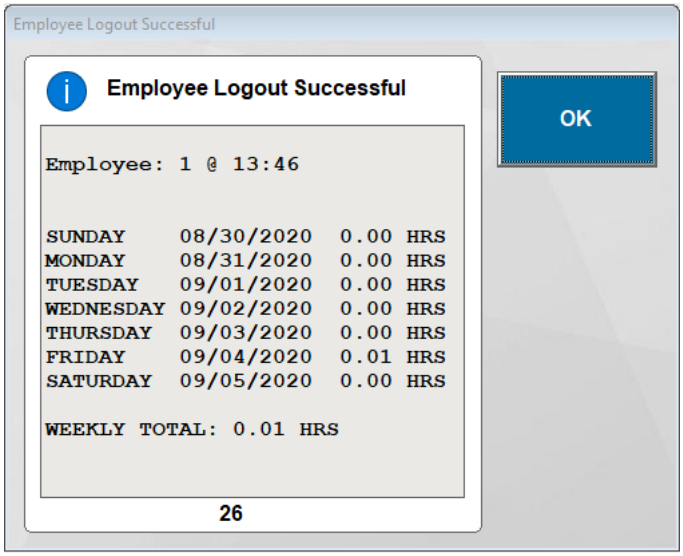
Before you can perform sales in the system, you must be clocked into the time clock. To clock in, perform the following steps:

1. Go to Restaurant System→Employee Time Clock→Employee Clock In.
2. Enter the employee number you wish to clock in, then press OK.
3. You should now receive a message that says "Employee Login Successful."



At the end of the day, to clock out of the time clock, perform the following steps:

1. Go to Restaurant System→Employee Time Clock→Employee Clock Out.
2. Enter the employee number you wish to clock out, then press OK.
3. You should now receive a message that says "Employee Logout Successful."

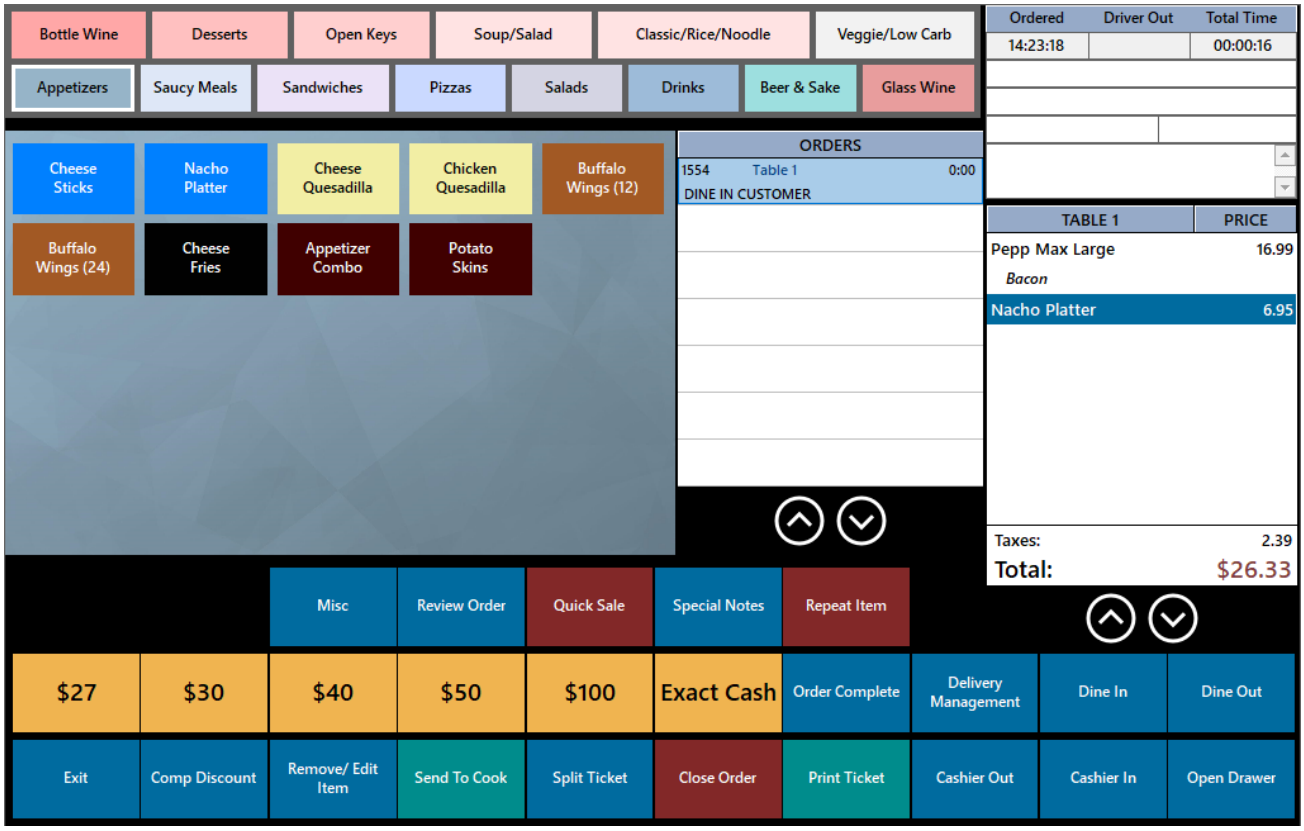


How to Create an Order

Once you have created an employee, and you have built your menu, you can begin creating sales in the system. Remember, you must be logged into the time clock to ring up sales.

To create an order, perform the following steps:

1. Go to Restaurant System→Restaurant Sales.
2. A Cashier Log In screen will appear. Enter your employee number, then press OK.
3. You will then see your menu and any open orders. To create a new sale, you can either click the Dine In button, the Dine Out button, or the Quick Sale button.
    a. Dine In would be used to seat a guest at a table. When you choose the Dine In option, the next screen will show table numbers where you can seat a guest. Click on the appropriate table number.
        i. This table layout can be changed in Restaurant System→Manager Functions→Define Table Areas.
    b. Dine Out would be used for Pick-Up or Delivery orders. When you choose the Dine Out option, the next screen will allow you to define any customer information, such as Name, Address, Phone Number, etc.
    c. Quick Sales are used in quick service environments, or for Take Out orders.
4. At this point, you may begin adding items to the ticket.



How to Close a Sale

To close a sale, perform the following steps:

1. Click the Close Order button.
2. Using the number pad, type in the amount that the customer is giving you. For example, if the customer gave you a $20 bill, then enter “20.00.”
3. Press the appropriate payment type button. For example, if the customer gave you cash, click the Cash button
4. Press Close Guest.

If you have any other questions, feel free to give us a call at 801-336-3303.