

Business Software Solutions Inc.



BPA Restaurant Professional Operations Manual

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1 Introduction

BPA Restaurant Professional is a product of Business Software Solutions Inc. The most important thing to an owner of a business is to provide a quality product or service to his customers. BPA Restaurant Professional was designed to enhance this process by providing rich functionality in an easy, user friendly environment.

There are two manuals that you will receive with your restaurant software. This manual contains information that is specific to the restaurant software. The other manual contains information that is directed toward the business accounting portion of the software you are receiving. This software system allows you to run a traditional POS and traditional accounting functions, in addition to the POS functions designed for restaurants. This is because some restaurants have gift stores, liquor stores, pro shops, etc. and use the traditional POS portion of the software for these functions.

With BPA Restaurant Professional you can perform accounts receivable, accounts payable, general ledger, customer orders, vendor orders, inventory control and product receiving. If you need to create budgets for each G/L account you can. If you want to convert any of your data base files to a spreadsheet format for import into a spreadsheet you can. If you want to browse any of your major data base files you can. If you want to order products from a specific vendor automatically when products fall below a specific level, you can. If you want to keep a phone list on-line, you can. If you want the system to automatically pay invoices that have an early payment discount coming it will. If you need to enter manual checks as well as print automated checks you can. If you need to password protect major module, you can. If you need to look at prior years' data for comparison you can. If you need to enter employee information and track hours worked and print payroll checks you can. If you need to track maintenance on your equipment you can. If you need to make financial calculations, you can.

BPA Restaurant Professional also provides 100's of reports/printouts: food costs, daily sales postings, monthly statements, past due statements, invoices, trial balance sheets, general ledger activity, balance sheets, income statements, changes in financial position, financial statements for any accounting period, variance in financial statements, vendor mailing labels, aged receivables, aged payables, sales analysis by customer, check registers, reports for all postings, customer lists by city, state or zip, vendor lists by state, employee and salesperson lists, phone lists, and a variety of product reports and inventory lists printed for cycle counting.

1.1 Scope of Document

Welcome to your new restaurant management system. This document will assist you in getting started. Topics that will be covered include software installation, system definitions, restaurant setup, and restaurant operations.

1.2 Hardware Requirements

You must meet the following minimum hardware requirements to use Business Plus Accounting:

1. Pentium 4 Processor or above.
2. Windows® XP/Vista/7/8 or Windows Server® 2003/2008
3. 10 GB of hard drive space.
4. 512 MB of memory.

Receipt printers used with this system must be Epson compatible receipt printers that support the cutoff command or another brand of printer that has a defined cutoff command and will operate in the generic text print mode. If your printer does not support the cutoff command you will waste time manually line feeding the printer before you tear the receipt from the printer. You must install the generic text print driver. Printer driver setup is accomplished in the Printer Setup area of your operating system.

1.3 Install Windows Software

To install your software correctly you must use the distribution CD, USB flash drive, or download link you received from Business Software Solutions. If your computer is not on, start it as you normally do. If installing from the CD, put the distribution CD into the CD drive. The system will immediately run the installation setup.exe routine on the CD. If you are installing the software from a USB flash drive, simply insert the flash drive, choose **Open folder to view files**, double click **start.exe**, and choose **Install BPA**. If you are installing from a download, simply save the downloaded file to your desktop and double click the file to run the installation.

The setup routine defaults to "\\BPA" for the installation directory. In the current software you must use "\\BPA" as that subdirectory. The setup routine then copies the distribution files to your hard drive.

1.4 Network Setup

When you run BPA Restaurant Professional on a network, most files are loaded onto the server computer. However, for optimal performance some files need to be loaded onto the client computers. To load these files on the client computers follow the steps outlined below for each computer.

First, you must map a network drive from the client computer to the root of the drive that BPA is installed in on the server. For example, if BPA is installed in C:\BPA on your server, then your client computer should have a drive mapped to the root of drive C on your server (Drive C on the server also needs to have read/write access enabled).

Next, from the client computer go to the mapped drive and the \BPA directory on that drive and run the file netsetup.exe. The default options should be correct, showing the **Destination Drive** as C, and the **Network Drive** as the drive you have mapped. Press the **Install BPA on this Workstation** button. The appropriate BPA client files will be installed on your computer, and a shortcut for Business Plus Accounting will be placed in your programs menu.

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2 Getting Started

2.1 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**.

Business Plus Accounting
Restaurant Professional 8.0
by Business Software Solutions, Inc.

We are glad you have chosen Business Plus Accounting by Business Software Solutions for your business. Please take a moment to enter the following information regarding your company.

Business Plus Accounting includes the following features:

- Customer Order Processing
- Point of Sale
- Inventory Control
- General Ledger
- Accounts Receivable
- Accounts Payable
- Vendor Orders
- Product Receiving
- ... And Much More!

Please Enter Your Company Information

Company Name:

Street:

City/State/Zip:

Country:

Telephone:

Fax:

State ID Number:

Federal ID Number:

Corporate ID:

G:\post (c:\bpa\glpost.dbf) Record: None Record Unlocked NUM 9:13:46 am

2.2 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:

1. **Employee #** - This is a number that you will define for each employee. Most of our customers will use the last 4 digits of each employee's Social Security number for this field.
2. **Last Name.**
3. **First Name.**

4. **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.

Define Employee

Employee Information			
Employee #:	<input type="text" value="5656"/>	Telephone:	<input type="text" value="() -"/>
Last Name:	<input type="text" value="Doe"/>	Telephone:	<input type="text" value="() -"/>
First Name:	<input type="text" value="John"/>	Fax:	<input type="text" value="() -"/>
Sale Person ID:	<input type="text" value="5656"/>	Position:	<input type="text"/>
Street:	<input type="text"/>	Full/Part Time:	<input type="checkbox"/>
City:	<input type="text"/>	<input type="checkbox"/> Allow Non-approved Clock Outs	
State:	<input type="text"/>	<input checked="" type="checkbox"/> Require Clock In To Access POS	
Zip:	<input type="text"/>	<input checked="" type="checkbox"/> Allow Cashout In Restaurant POS	
Email:	<input type="text"/>		
Web Site:	<input type="text"/>		

2.3 Creating Your Menu

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

2.3.1 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. 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 cheeseburger, you would type “Cheeseburger.”
 - 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 “Cheeseburger” example, you can place this product under the “Food Items” category. Press the F8 key to view a list of categories, and then select the appropriate category. 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 check in this box if this product needs to be taxed.
 - e. **Price Level 1** – This is the price that you are charging for this product.
3. Press **Save** when finished.

Define Product

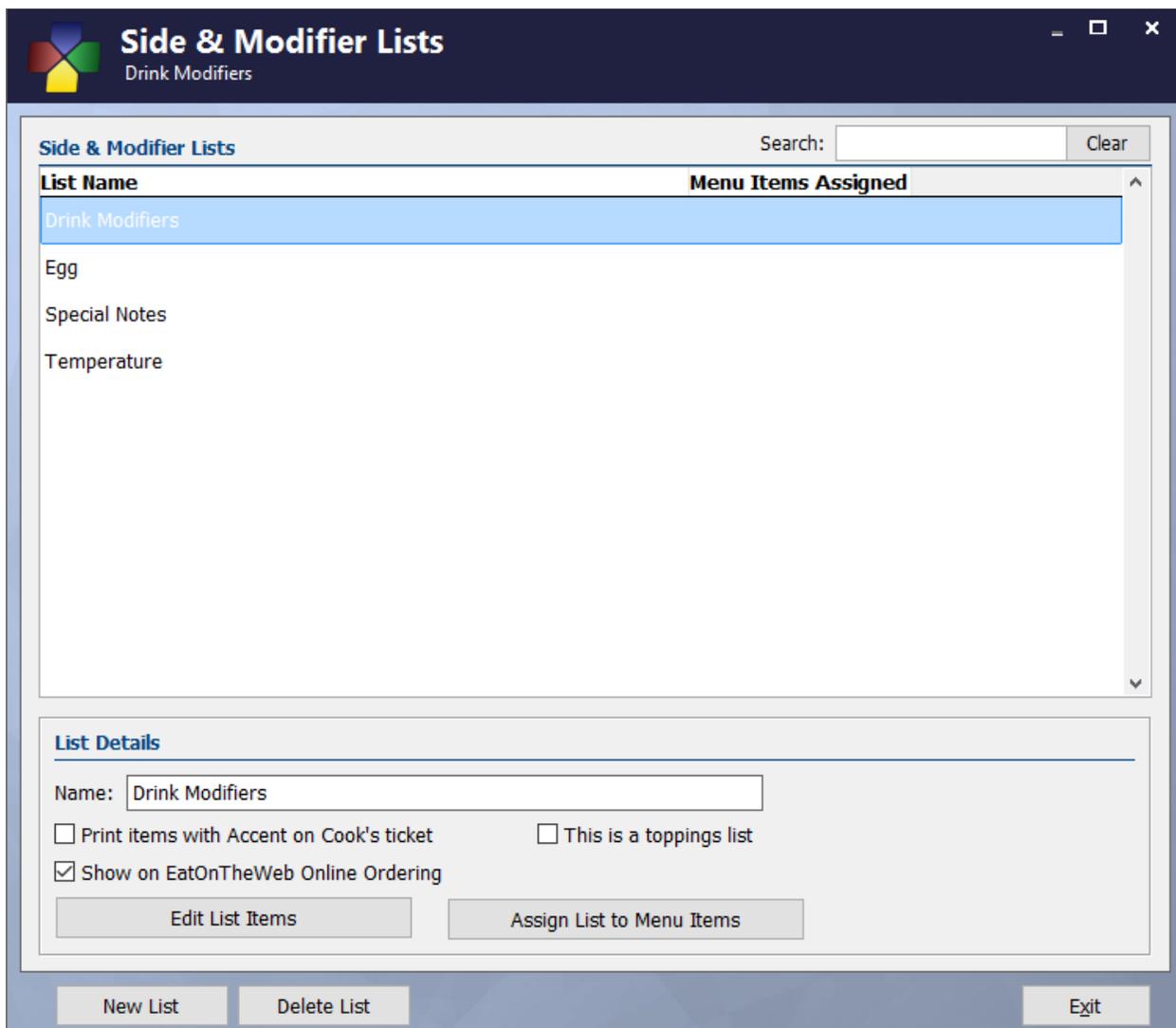
Product Information	
Product/Service:	ENT_BERGDELUXE
UPC Code:	
Description 1:	Burger Deluxe
Description 2:	
Description 3:	
Department:	
Product Type:	FOD
Product/Service:	P
<input checked="" type="checkbox"/> Product is Active	
<input checked="" type="checkbox"/> Sales Taxable	
Tax Group:	Sales Tax
<input type="checkbox"/> Tax Included In Price	
<input checked="" type="checkbox"/> Goods Taxable	
<input checked="" type="checkbox"/> Tax Dine In	
<input checked="" type="checkbox"/> Tax Dine Out	
Bar Tax %:	0.000
Unique Tax% :	0.000

Pricing & Cost	
Price Level 1 (Dine In):	7.990
Price Level 2 (Dine Out):	
Price Level 3:	
Price Level 4:	
Price Level 5:	
Compare At:	
Cost:	
Happy Hour Price:	
Lunch Price:	
Other Price:	
Member Price:	
Sunday Price:	
Monday Price:	
Tuesday Price:	
Wednesday Price:	
Thursday Price:	
Friday Price:	
Saturday Price:	

2.3.2 Creating Side and Modifier Lists

The next step would be to create side and modifier lists. To create a new list, follow these steps:

1. Go to **Restaurant System > Manager Functions > Define Side & Modifier Lists**
2. There are 4 Modifiers that are predefined in the software **Drink Modifiers, Egg, Special Notes** and **Temperature**. You can remove or edit any of these lists based on your requirements.
3. Click the **New List** button on the bottom of this window to create a new list and then fill out the information under **List Details**.
 - a. **Name** – The name of the modifier list.
 - b. **Print items with Accent on Cook's ticket** – Print items from this list using the accent printing option available under **Misc Definitions > Printer & Devices**.
 - c. **Show on EatOnTheWeb Online Ordering** – Show these modifiers on your integrated EatOnTheWeb online ordering web site.
 - d. **This is a Toppings List** – Treat items on this list as toppings which allows you to:
 1. Use a pricing matrix to charge for the number of toppings selected.
 2. Configure a half & half item, where each half can have different toppings.
 3. Specify the default values that are selected for an item.



4. Click on **Edit List Items** to add items to the list. For each item on this list specify the following options:
 - a. **Name** – The name that will appear on the screen and on the kitchen ticket.
 - b. **Product ID** – Optionally assign a product ID for this item. A product ID is required if you want to track inventory or costing for this item.
 - c. **Price** – The price that should be added to an item if this side is selected.
 - d. **Member Price** – Alternate price to add for sales to customer marked as members.
 - e. **Display Order** – The order in which the button for this item will appear on the screen.
 - f. **Print Order** – The order in which this item will print on the cook's ticket.
 - g. **Hold/Fire** – Specify the default Hold/Fire value for this item.
 - h. **Color** – Specify the color of the button for thisw modifier.
 - i. **Sublist ID** – If this modifier will also have options available, specify the Side List to use.

- Click **Add Item** to add a new item to the list and use **Delete Item** to remove items from the list and press **Exit** when you are done.

Sides & Modifiers: Drink Modifiers
something

List Items

Product ID	Name	Price	Order
	Mineral Water		1
	Club Soda		2
	Cola		3
	Cranberry Juice		4
	Lemon Juice		5
	Line Juice		6
	Orange Juice		7
	Ginger Ale		8
	Grapefruit Juice		9
	Pineapple Juice		10
	Tomato Juice		11

Item Details

Name: Display Order:

Product ID: Print Order:

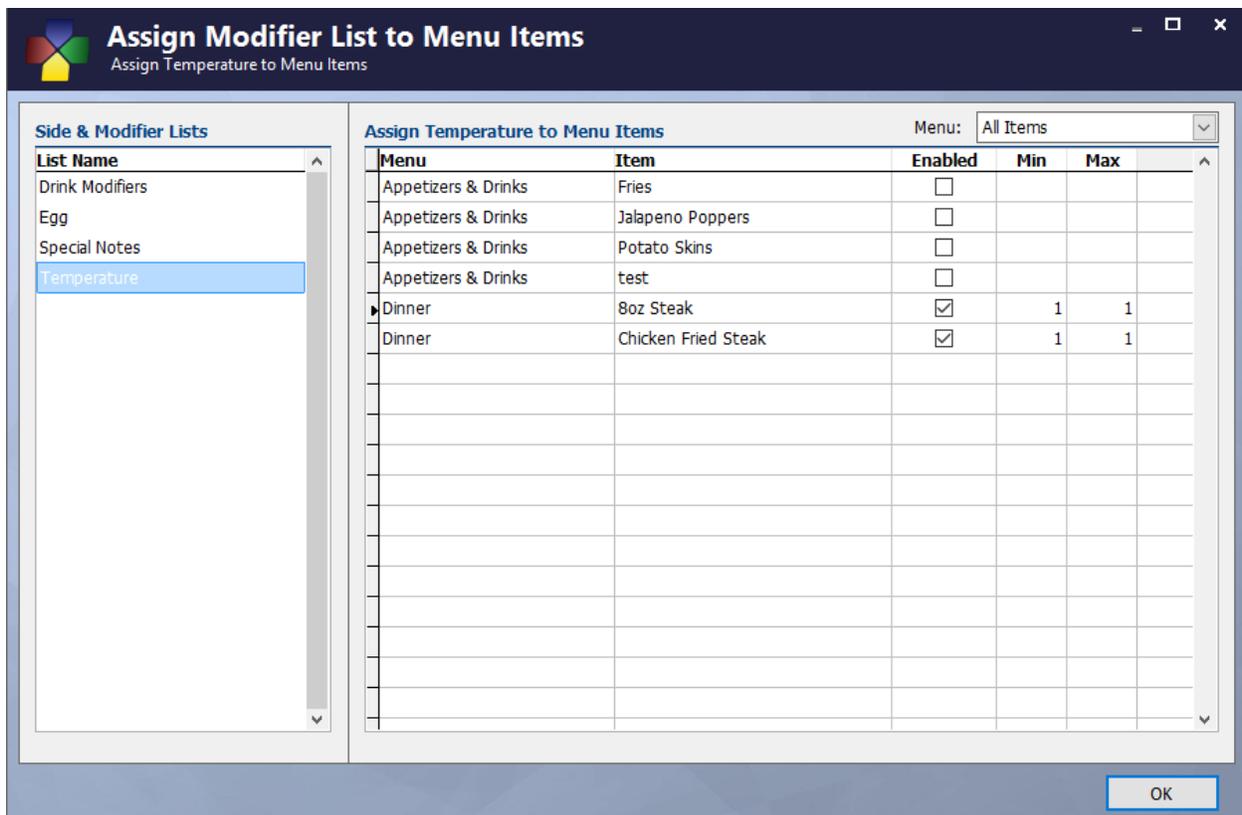
*Required for inventoried items Hold/Fire:

Price: Color:

Member Price: Sublist ID:

Sublist Name:

- Click on **Assign List to Menu Items** and select your Side/Modifier list and check **Enabled** next to the menu button to add this list to that menu button. You can also put in a Minimum and Maximum number to restrict the number of side items that can be added for this button. When you are finished press **OK**.



2.3.3 Define Per Topping Price Matrix

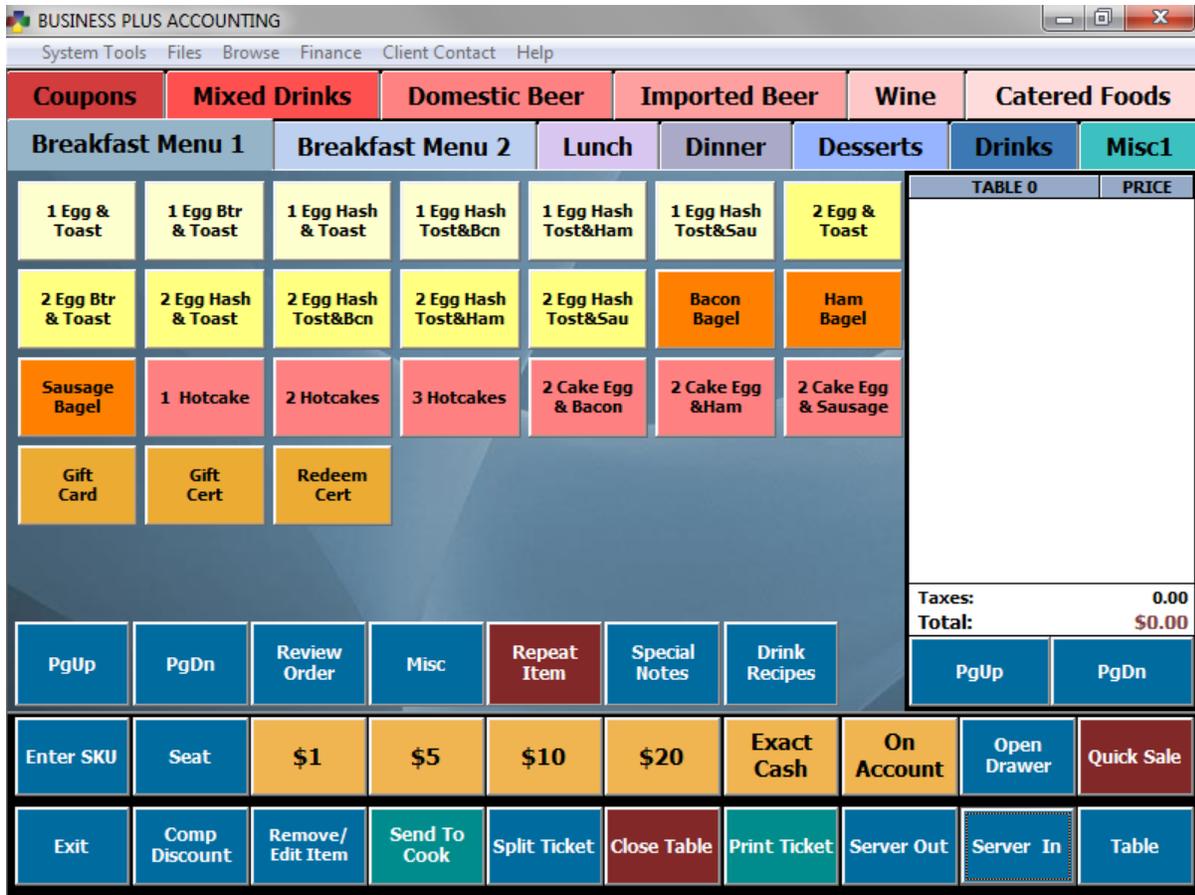
Some restaurants want to make ordering as simple as possible to speed up operations. This is important to the pizza industry because such a large portion of your daily business happens during a short period of time. One way to accomplish this is to use a pricing matrix for each type of pizza you sell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

Any side list that is assigned as a topping list can use the **Per Topping Price Matrix**.

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. Remember, the base price for each pizza was already defined in **Define Products**.
4. Press F3 on your keyboard when finished.



To change the tab names, perform the following steps:

1. Go to **Restaurant System > Manager Functions > Assign Menu Names**.
2. Change the menu names as needed.
3. If you will not be using all of the menu tabs, you may place an "N" in the active column.
The menu tab will not be displayed on the restaurant sales screen
4. Press the F3 key on your keyboard when you are finished.

- a. **Product Code (SKU)** - This is the name of the products that you added in Define Products. To view a list of these products, 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, select the F8 key on the keyboard.
- c. **Button Text Top/Bottom** – This is the text that will show on the button on your menu. For example, using our Cheeseburger, you could just enter “Cheeseburger” in this field. 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.

Item Modifiers

Assign Sides and Modifier Lists to this menu item.

Modifier List	Min	Max	Order	Topping Price Matrix	Default Toppings
Temperature	1	1			

Charge 1/2 and 1/2 pizzas for most expensive side

Kitchen Printing

Print on Kitchen Printer 1 Items not assigned to 1 or more cook's printers can print on default receipt printer (See Misc Definitions)

Print on Kitchen Printer 2

Print on Kitchen Printer 3

Print on Kitchen Printer 4

Print on Kitchen Printer 5

Print on Expediter Printer

Cook's Printer Text:

- d. **Modifier Lists** – This is where you will select which side list will appear when the menu item is added to the ticket. Click **Assign Side Lists** and place a check mark next to the appropriate side lists. You can specify the minimum and maximum selections from each list, as well as the order in which the Side Lists will display. For lists that are marked as Toppings Lists, you can also specify a pricing matrix and default selections if they are applicable.
 - e. **Cook's Printers** – 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 check next to the appropriate kitchen printer. If you only have one (1) kitchen printer, then you can just check **Print on Cook's Printer 1**.
3. Press **Save** when finished.

2.4 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.

Define Sales Tax Rates

Customer Sales Tax Rates | **Product Tax Reporting Groups**

When customers are defined they are given a sales tax table number. That table number corresponds to a sales tax rate. All customers given the same table number will have the same sales tax rate.

Use this screen to assign tax rates to the tax table numbers. To change a sales tax rate for a group of customers you only have to change the rate in the tax table. For exempt customers create a 0.0 tax rate.

If you have products that should be charged at a different rate from your standard sales tax rate, you can specify their tax unique tax rate using product definitions.

Sales Tax

TAX CODE	CITY - COUNTY	STATE	TAXRATE
1	Your City	UT	6.0000
2			0.0000
3			0.0000
4			0.0000
5			0.0000
6			0.0000
7			0.0000

Sales Tax name to print on invoices:

Minimum Sales Amount for Sales Tax In Restaurant POS (If Applicable):

GST Tax

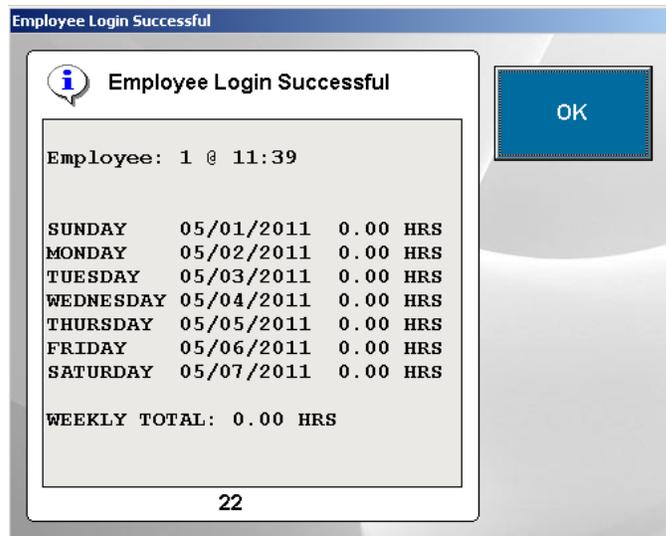
Goods And Services Tax Rate (Used In Canada):

Goods & Services Tax name to print on invoices:

2.5 Clocking In and Out of the Time Clock

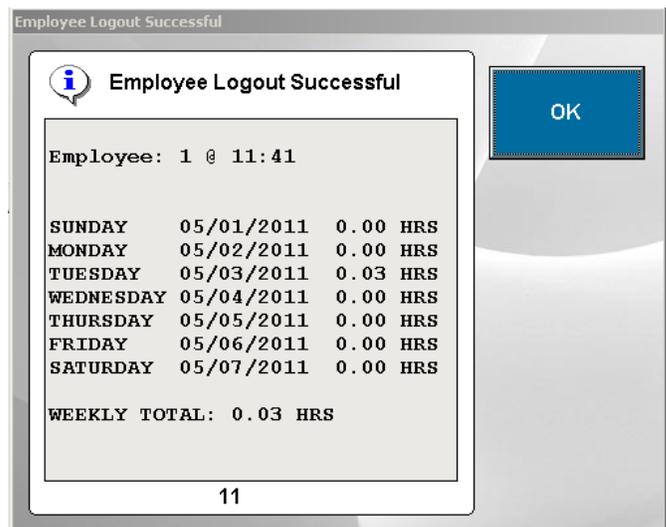
Before you can perform sales in the system, you must be clocked into the time clock. To clock in, perform the following steps:

1. Go to **Restaurant System > Server Clock In/Clock Out > 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 > Server Clock In/Clock Out > 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.**

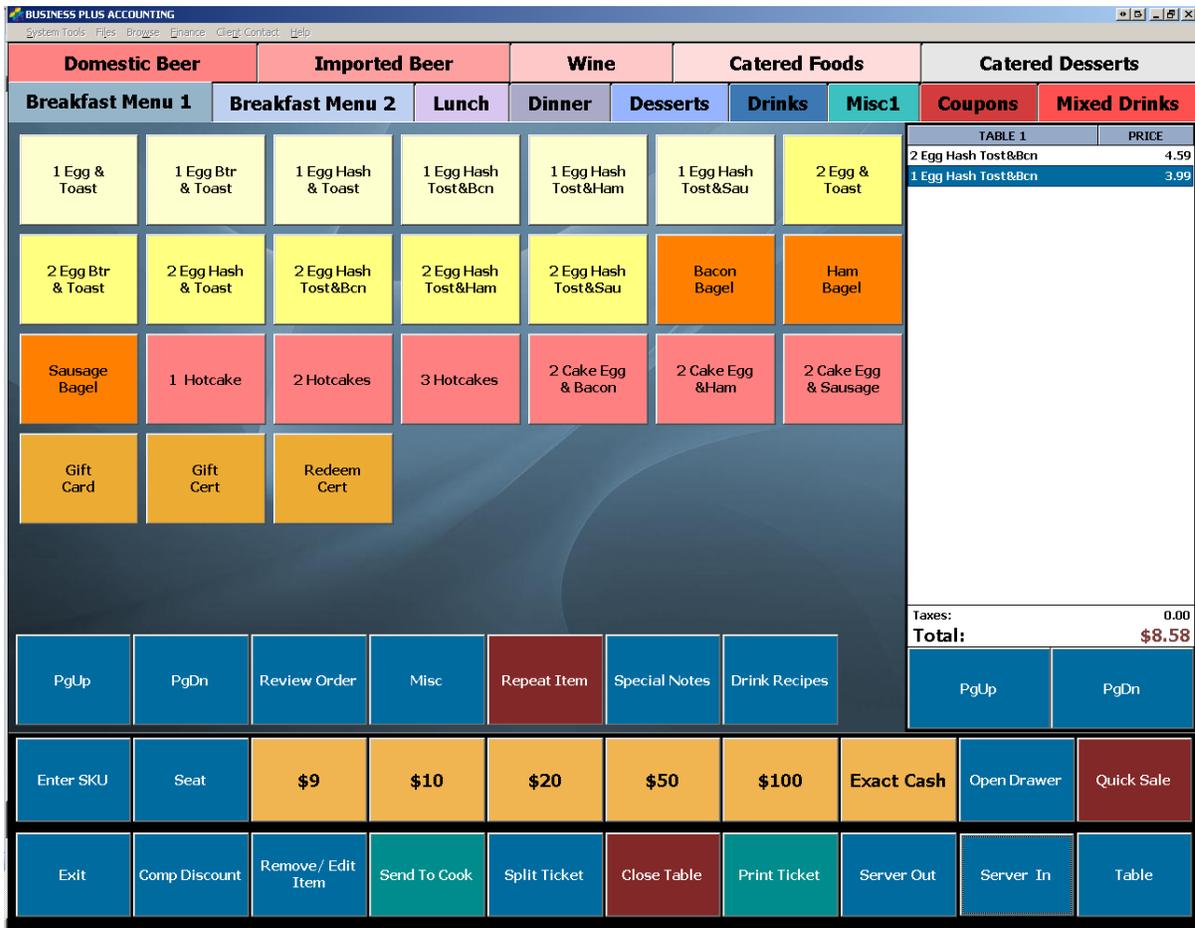


2.6 How to Create an Order

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 Server Log In screen will appear. Enter your employee number, then press **OK**.
3. You will then see the **Open Table** screen. To create a new sale, click the **New Table** button.
4. The next screen will show table numbers where you can seat a guest. Click on the appropriate table number. This table layout can be changed in **Restaurant System > Manager Functions > Define Table Areas**.
5. At this point, you may begin adding items to the ticket.



2.7 How to Close a Sale

To close a sale, perform the following steps:

1. If you do not have the order pulled up, in **Restaurant Sales**, click on the **Table** button (bottom right corner), and select the table number you want to close.
2. Click the **Close Table** button.
3. 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."

- Press the appropriate payment type button. For example, if the customer gave you cash, click the **Cash** button
- Press **Close Guest**.

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Coupons Mixed Drinks Domestic Beer Imported Beer Wine Catered Foods

Breakfast Menu 1 Breakfast Menu 2 Lunch Dinner Desserts Drinks Misc1

Table: 1 CASH OUT Ticket: 1003

1 Egg & Toast	1	2	3	\$20	Guest	Select Guest	2	SPLIT PAYMENT	PRICE
2 Egg Btr & Toast	4	5	6	\$10	Ticket Total:			\$7.38	4.59
Sausage Bagel	7	8	9	\$5	Gratuity	Use Change As Tip	\$1.50	AUTHORIZE CREDIT CARD	1.49
Gift Card	0	.	Clear	\$1	Card	Exact Card	\$0.00	REPRINT CREDIT CARD SLIP	1.49
	Value: <input type="text"/>			\$50	Check	Exact Check	\$0.00	ON ACCOUNT	1.29
PgUp	Exit Without Closing			\$100	Cash	Exact Cash	\$10.00	OFF ACCOUNT	0.00
Enter SKU	Close Guest				Pay With Gift Card		\$0.00		\$10.15
					Change:		\$2.62		

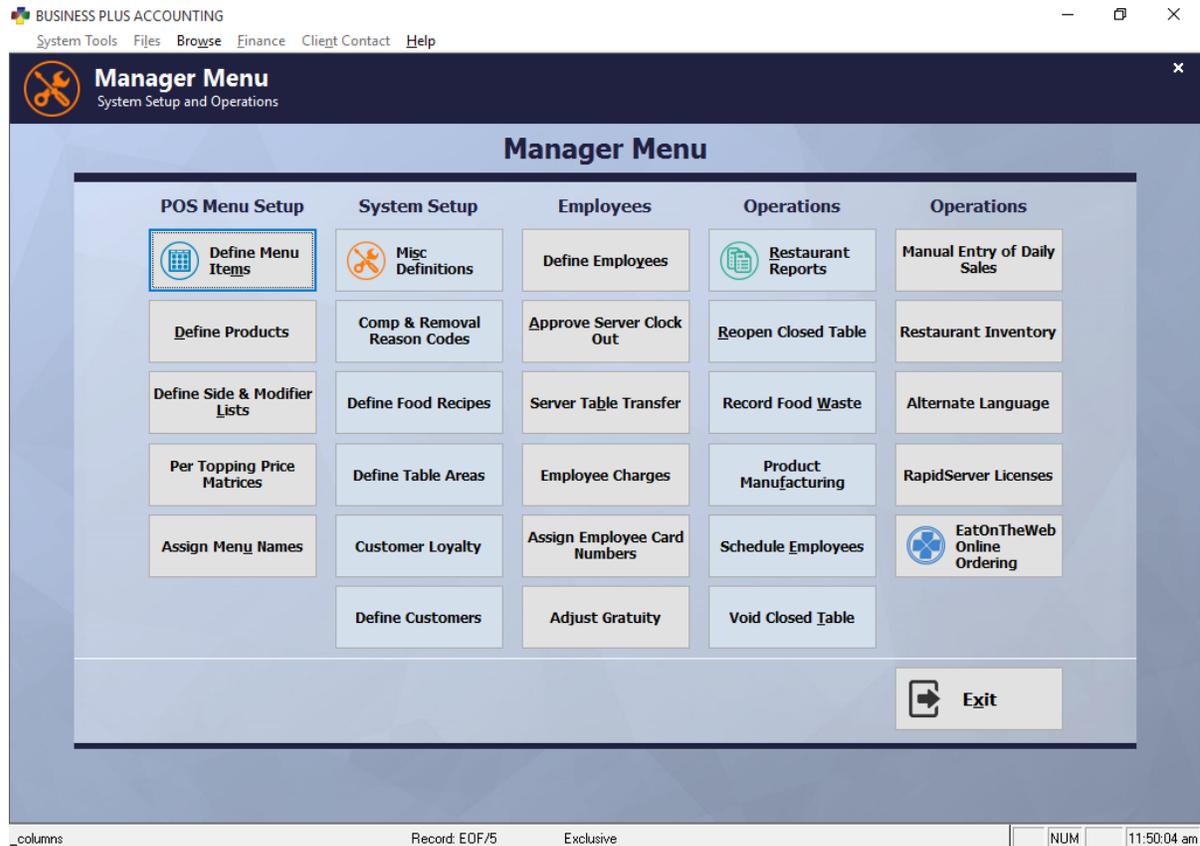
Quick Sale

Exit Comp Discount Remove/Edit Item Send To Cook Split Ticket Close Table Print Ticket Server Out Server In Table

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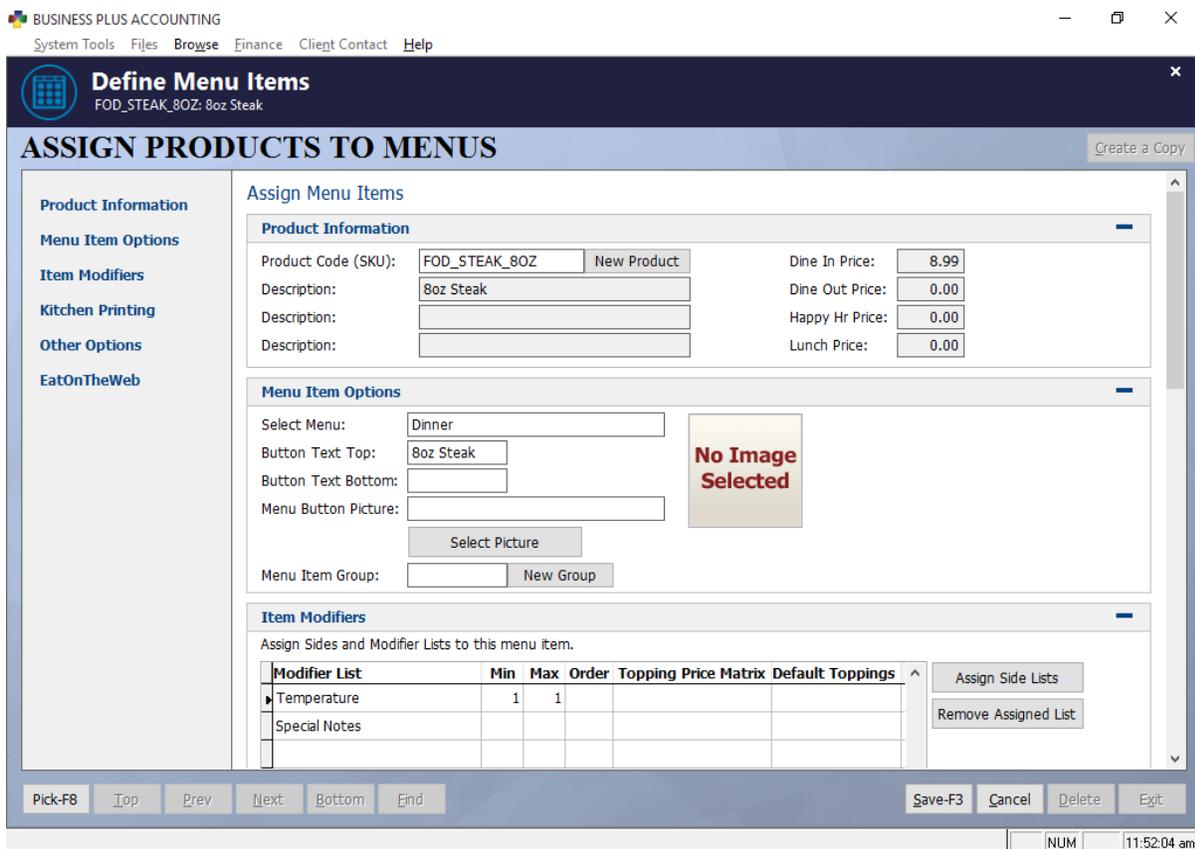
3 Manager Functions



After you have set up your hardware and installed the software on your server computer you can begin setting up your restaurant software. First go to the restaurant manager screen by clicking on **Restaurant System** and then **Manager Functions**. This is where most of the setup occurs for the restaurant system. First, define your employees. Assign employee numbers to them i.e. 1,2,3,4,5 etc. Next define all the products that you will put on your menus i.e. Chicken Wings, House Salad etc. Then define your vegetable list, your soup/salad list, your potato list, your mixing modifiers, your custom side lists, your recipes. Next assign the products to your menus. You also need to assign a sales tax percentage to the sales tax table # 1. To do this, go to the **Business System** off the main menu. Then select **Definitions** and the **Sales Tax Table** option and enter your percentage. You are now ready to log a server in and run your restaurant. To prevent unauthorized personal for entering the accounting system or the manager screen you will want to go to the accounting definition screen and assign passwords. Refer to the accounting manual for instructions on passwords.

3.1 Define Menu Items

3.1.1 Adding Menu Items



Before assigning items to the various menus (i.e. appetizer, dinner, lunch, breakfast, liquor, sides and extras), you must define each item in the product definition screen. You must also define the sides (soups/salads, vegetables, custom items lists, recipes, and the potatoes) that can be selected and added to an entree. When your products and sides have been defined you can assign each item to one or more menus.

Product Code (SKU): Here you enter the SKU of the product you are adding to the menu. If you cannot remember the SKU then you can press F8 and get a pick list of all defined products (items)

New Product: Use this button if you need to define a new product for the menu item.

Select Menu: Again, you can press F8 and get a pick list of the valid menus. This is the menu the menu item or button will be placed on. See **Assign Menu Names** to rename menus.

Button Text Top/Bottom: After selecting the menu you will need to key in the text you want to appear on the button for the item. You can enter two lines of text for the button, each 10 characters long i.e. "Roast" in the top line and "Beef" in the bottom line for a button that will be shown as "Roast Beef".

Menu Button Picture: This feature allows you to use an image for your menu button instead of button text. The image to be used can be any image you choose but the best size to use is about 100 pixels x 100 pixels.

Menu Item Group: Menu buttons may be grouped together under one menu group button. I.e., You may set up a menu item for a large cheese pizza, medium cheese pizza, and small cheese pizza and assign all of them to a group called cheese pizza. You may select F8 to choose an existing group or press the **New Group** button to set up a new group.

Modifier Lists: Assign any sides that are needed or offered with this item (i.e. **Soup/Salad, Vegetable, Potato**). Select **Assign Side Lists** and place a check box to the appropriate side lists. When a server enters an item for a customer and the item has been defined as requiring a vegetable, the vegetable list will come up and the server will select the vegetable that the customer has requested. These sides print on the cook's ticket with the item.

A side/modifier list can also be a toppings list to add items on it such as pepperoni on a pizza or toppings on a sub. For list that are toppings the Min and Max feature should not be used.

Kitchen Printing	
<input checked="" type="checkbox"/> Print on Kitchen Printer 1	Items not assigned to 1 or more cook's printers can print on default receipt printer (See Misc Definitions)
<input type="checkbox"/> Print on Kitchen Printer 2	
<input type="checkbox"/> Print on Kitchen Printer 3	
<input type="checkbox"/> Print on Kitchen Printer 4	
<input type="checkbox"/> Print on Kitchen Printer 5	
<input type="checkbox"/> Print on Expediter Printer	
Cook's Printer Text: <input type="text"/>	
Other Options	
<input type="checkbox"/> This item is a Security Event	
<input type="checkbox"/> Prompt for a custom price	
<input type="checkbox"/> Prompt for a custom credit amount	
<input checked="" type="checkbox"/> Item button is active	

Kitchen Printers: There are 5 cook's printers and 1 expediter printer that can be assigned to each item. Usually, an item is assigned to only one cooks printer. Occasionally, an item will need to go to two different cooks printers (part of the order is prepared by one cook and part by another). When this situation occurs, you can assign multiple cook's printers to one item.

- Cook's Printer Text:** This option allows you to define alternate text that will print on the cook's ticket. Without this option set, the cook's ticket text will be whatever is defined as the button text. This allows you to put item specific information for the cook to make things easier for the cook.
- Security Event:** The security event option allows you to make a record of each sale of this menu item so that you can use the security events reports to track the activity. You may also choose to password protect the selling of items marked as security events.
- Allow a Custom Price:** If you need to be able to assign a price at the POS screen when the item is selected this is the option that allows this. To enable custom pricing for the item you are defining check this box. As an example, you might use this function if you were selling lobster and charging different prices based on the weight of the lobster.
- Allow a Custom Credit:** Use this option if you need to apply a custom credit or dollar discount at the time of the sale. Use this option for things such as custom coupon products that have varying value.
- Make Item Button Active:** This option allows you to remove a menu item from your menu without actually removing the item. If the menu button is marked inactive it will appear greyed out on the menu and will not be able to be used. This is useful for items that are only needed periodically.
- Create a copy:** Use this option if the item you want to add will have the same settings as another menu item. Simply select the item with the required settings and then use the option to create a copy to save time and effort.

3.1.2 *Assign Menu Item Order*

ITEM	TOP TEXT	BOTTOM TEXT	SCREEN ORDER	BUTTON COLOR	ACTIVE
1 Egg & Toast	1 Egg &	Toast	001	Choose Color	Y
1 Egg Beater & Toast	1 Egg Btr	& Toast	005	Choose Color	Y
1 Egg Hash Brns & Toast	1 Egg Hash	& Toast	010	Choose Color	Y
1 Egg Hash Brn Toast Bac	1 Egg Hash	Tost&Bcn	015	Choose Color	Y
1 Egg Hash Brn Toast Ham	1 Egg Hash	Tost&Ham	020	Choose Color	Y
1 Egg Hash Brn Toast Sau	1 Egg Hash	Tost&Sau	025	Choose Color	Y
Bacon Bagel	Bacon	Bagel	030	Choose Color	Y
Ham Bagel	Ham	Bagel	035	Choose Color	Y
Sausage Bagel	Sausage	Bagel	040	Choose Color	Y
1 Hotcake	1 Hotcake		045	Choose Color	Y
2 Hotcakes	2 Hotcakes		050	Choose Color	Y
3 Hotcakes	3 Hotcakes		055	Choose Color	Y
Hotcake 2 Eggs Bacon	2 Cake Egg	& Bacon	060	Choose Color	Y
Hotcake 2 Eggs Ham	2 Cake Egg	&Ham	065	Choose Color	Y

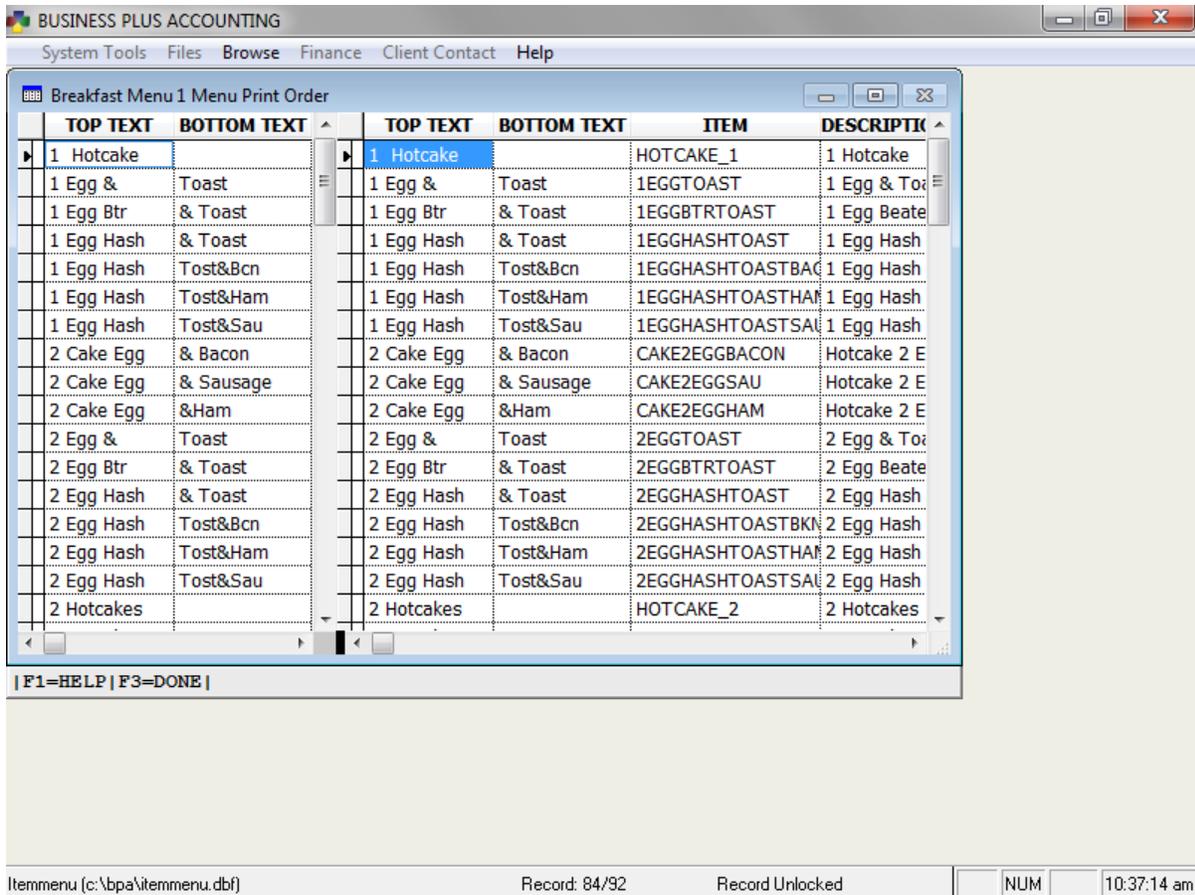
| F1=HELP | F3=DONE |

Itemmenu (c:\bpa\itemmenu.dbf) Record: 69/92 Record Unlocked NUM 10:28:13 am

Assign menu item order gives you the opportunity to set the order of your buttons and select the color of each menu button. You can access this function by going to **Restaurant System > Manager Functions > Define Menu Items > Assign Menu Item Order**. Select the F8 key on your keyboard and select the menu you would like to work with and hit Enter. The **Screen Order** field is a 3 digit numeric field. Buttons will be arranged on the screen from left to right and top to bottom in the numeric order you specify here. In the example above you will notice that the first button is numbered 001 and not simply 1. Be sure to always include a 3 digit number. You will also notice that we have left space between our numbering, starting with 001 and then 005. This will make it much easier for us to add buttons between the first two if we add items to the menu at a later time.

To assign a color to the menu button simply click the **Choose Color** button and select the color.

3.1.3 Change Menu Item Assignments



Occasionally you may find that you need to quickly change the printer assignments or side lists for multiple items on a menu. **Change Menu Item Assignments** gives you this functionality. To access this function simply go to **Restaurant System > Manager Functions > Define Menu Items > Change Menu Item Assignments**. Hit F8 on your keyboard and select which menu you would like to work with and hit enter. In the right pane you may scroll to the right and change any side lists, printer options, etc., for multiple items at a time. Hit F3 when you are finished.

3.2 Define Employees

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EMPLOYEE #1: Jones, John

EMPLOYEES

Define Employee

Employee Information

Employee #: 1 Telephone: (801) 334-3303
 Last Name: Jones Telephone: () -
 First Name: John Fax: () -
 Sale Person ID: 1 Position: Server
 Street: 334 Marshall Way Full/Part Time: F
 City: Layton Allow Non-approved Clock Outs
 State: UT Require Clock In To Access POS
 Zip: 84014 Allow Cashout In Restaurant POS
 Email:
 Web Site:

Comissions

Use Commission Levels
 Commission % on Sales:
 Commission % on GPM:

Work History

Hire Date: 01/01/2005
 Eligible For Rehire
 Termination Date: / /
 Term Reason:

Pick-F8 Top Prev Next Bottom Find Print Save-F3 Cancel Delete Exit

Employee (c:\bpa\employee.dbf) Record: 1/2 Record Unlocked NUM 8:44:20 am

Each employee that is going to use the system must be defined with an employee number. This number will be used to clock in and out as well as to log into the system to place orders. At the very minimum you must define an employee number, first and last name, and sales person ID. Other fields are optional. Hourly rates and tax information must be filled out in order to use labor tracking and payroll features in the software.

- Employee Nbr:** Enter the employee's identification number. The employee's identification number will be used throughout the system to identify a specific employee.
- Last Name:** Enter the employee's last name.
- First Name:** Enter the employee's first name.
- Salesperson ID:** Defaults to the employee number.
- Street:** Enter the employee's mailing address (street).
- City:** Enter the employee's mailing address (city).
- State:** Enter the employee's mailing address (state).

Zip: Enter the employee's mailing address (zip).

Email: Enter the employee's email address.

Website: Enter the employee's website address.

Telephone: Enter the employee's phone #.

Fax: Enter the employee's fax #.

Position: Enter the employee's position in the company.

Full/Part Time (F/P): Enter "F" for full-time, "P" for part-time status.

Allow Non-approved Clock Outs: Choose whether or not to allow servers to clock out without manager approval.

Require Clock In To Access POS: This option requires employees to be clock in to the time clock in order to place restaurant sales. If an employee will not be using the time clock, uncheck this option.

Allow Cashout In Restaurant POS: Choose whether or not to allow the employee to close orders in the Restaurant POS.

Use Commission Levels: Select whether or not to use defined commission levels.

Commission % on Sale: If this employee has been defined as a salesperson, enter the percentage you wish to be used in calculating sales commissions. The commission is a percentage of net sales.

Commission % on G.P.M.: If this employee has been defined as a salesperson, enter the percentage you wish to use in calculating sales commissions. The commission is a percentage of gross profit margin.

Date Of Hire: Enter the date the employee was hired.

Rehire Eligible: Check this option to indicate whether or not the employee is eligible for rehire in the future.

Termination Date: Enter the date the employee was terminated, if applicable.

Term Reason: Enter the reason for terminating the employee for future reference.

Payroll Information	
Payroll Parameters	
Soc Sec #:	<input type="text" value="111-11-1111"/>
Exemptions (0-10):	<input type="text" value="1"/>
Tax Status (M/S/X):	<input type="text" value="S"/>
Paid Leave	
Vacation Current/Bank:	<input type="text"/> / <input type="text"/>
Total Vacation Hours:	<input type="text"/>
Sick Hours Current/Bank:	<input type="text"/> / <input type="text"/>
Total Sick Hours:	<input type="text"/>
Floating Hol. Hours Avail:	<input type="text"/>
Date Leave Calculated:	<input type="text" value="/ /"/>
Wages	
Hourly Rate 1:	<input type="text" value="2.00"/>
Job Code 1:	<input type="text"/>
Hourly Rate 2:	<input type="text"/>
Job Code 2:	<input type="text"/>
Hourly Rate 3:	<input type="text"/>
Job Code 3:	<input type="text"/>
Over Time Rate 1:	<input type="text"/>
Over Time Rate 2:	<input type="text"/>
Over Time Rate 3:	<input type="text"/>
Salary:	<input type="text"/>

- Soc Sec #: Enter the employee's social security number.
- # Of Exemptions (0-10): Enter the number of tax exemptions claimed by the employee (0-12).
- Tax Status (M/S/X): Enter the employee's tax status. M= Married, S=Single, X=Exempt Student.
- Vac Hrs Current/Bank: Enter the number of vacation hours earned by the employee.
- Total Vac Hours: Enter the total number of vacation hours for the employee.
- Sick Hrs current/Bank: Enter the number of sick hours used by the employee.
- Total Sick Hours: Enter the total number of sick hours for the employee.
- Floating Holiday. Hrs: Enter the total number of floating holiday hours.
- Date Leave Calculated: Enter the date that the above totals were calculated.
- Hourly Rate 1-3: Enter the employee's hourly rate, if applicable. The software allows for each employee to clock in under one of three job descriptions and allows for a different pay rate for each, i.e. Server, Busser, Cook etc.
- Job Code 1-3: Click in this box and select the **Pick** button to see available job codes or positions. Additional positions may be defined from the **Define Employees** menu.
- O.T. Rate 1-3: Enter the overtime rate for each of the hourly rates defined above (where applicable).

Salary: Enter the employee's salary based on the pay period, weekly, biweekly, semimonthly, monthly.

Payroll Tax Information	
YTD Gross:	<input type="text"/>
YTD Soc Sec:	<input type="text"/>
YTD Medicare:	<input type="text"/>
YTD Fed With Holding:	<input type="text"/>
YTD State With Holding:	<input type="text"/>
State Tax % of Federal:	<input type="text" value="0.000"/>
State Tax % of Gross:	<input type="text" value="0.000"/>
City Tax % of Federal:	<input type="text" value="0.000"/>
City Tax % of Gross:	<input type="text" value="0.000"/>

State Payroll Tax Thresholds	
If the taxing state for this employee requires a minimum payroll amount to be met before any state taxes are withheld, you may enter the minimum taxing thresholds for this employee below.	
Weekly:	<input type="text"/>
Bi-Weekly:	<input type="text"/>
Semi-Monthly:	<input type="text"/>
Monthly:	<input type="text"/>
Quarterly:	<input type="text"/>
Semi-Annual:	<input type="text"/>
Annual:	<input type="text"/>

YTD Gross: Enter the employee's year-to-date gross earnings. If you are using BPA's payroll module this and the next four fields are automatically updated when the payroll is posted. If you are using a manual system, these fields will need to be manually updated.

YTD Soc Sec: Enter the employee's year-to-date social security withholdings.

YTD Medicare: Enter the employee's year-to-date Medicare withholdings.

YTD Fed With: Enter the employee's year-to-date federal withholding tax.

YTD State With: Enter the employee's year-to-date state withholding tax.

State Tax% Of Fed: The state withholding tax tables for the state of Utah are included in the software. For states other than Utah the payroll deduction for state withholding tax can be made as a percentage of the federal withholding tax. The individual state tax commission will know what the percentage is for the state in which you live.

State Tax % Of Gross: If the State Withholding Tax for your state is a percent of gross wages, enter the % into this field.

City Tax% Of Fed: The payroll deduction for city withholding tax can be made as a percentage of the federal withholding tax. The individual city tax commission will know what the percentage is for the city in which you live.

City Tax % Of Gross: If the city withholding tax for your city is a percent of gross wages, enter the % into this field.

State Payroll Tax Thresholds are setup for those states that require a minimum payroll amount to be met before any state taxes are withheld.

The thresholds are setup as follows: **Weekly, Bi-Weekly, Semi-Monthly, Monthly, Quarterly, Semi-Annually, Annually, and Daily.**

3.3 Define Products

PRODUCTS Create a Copy

Define Product

Product Information

Product/Service: BURGDELUXE Sales Taxable
 UPC Code: Tax Group: Sales Tax
 Description 1: Burger Deluxe Tax Included In Price
 Description 2: Goods Taxable
 Description 3: Tax Dine In
 Department: STE Tax Dine Out
 Product Type: FOD Bar Tax %: 0.000
 Product/Service: P Unique Tax% : 0.000
 Product is Active

Pricing & Cost

Price Level 1 (Dine In): 7.990	Happy Hour Price: 0.000	Sunday Price: 0.000
Price Level 2 (Dine Out): 0.000	Lunch Price: 0.000	Monday Price: 0.000
Price Level 3: 0.000	Other Price: 0.000	Tuesday Price: 0.000
Price Level 4: 0.000	Member Price: 0.000	Wednesday Price: 0.000
Price Level 5: 0.000		Thursday Price: 0.000
Compare At: 0.000		Friday Price: 0.000
Cost: 0.000		Saturday Price: 0.000

Inventory Information

Unit Of Measure: ea Vendor Conversion UM:
 Unit Weight: 0.000 Vendor Conversion ID:

Pick-F8 Top Prev Next Bottom Find Print Add Modify Delete Exit

add new record / Save edits NUM 9:15:30 am

All products that you sell in your restaurant, gift shop, or that you order from your vendors must be defined in your system. This includes entrees, beverages, side items, modifiers, and up charges. If you intend to use the system to track inventory you will also need to define a product for each raw item you order from your vendors. The costs assigned to these items will aid you in obtaining accurate food costs. The description you enter for each **Product/Service** will appear on your customer receipts. Services are treated like products. To define an hourly service rate, first assign a product number. Enter a description in the description field (i.e., "Hourly Service Rate"). Enter a unit of measure (i.e., "hour"). Then enter the price (i.e., \$30.00 meaning \$30.00 per hour). If you have different labor rates, you will need to define a **Product/Service** number for each rate.

There are several fields on the product definition screen that you will not be using in your **Restaurant System**. Those fields are used in the **Business System** for traditional sales. The fields that you must fill in for the **Restaurant System** are the **Product/Service**, **Description 1**, **Product Type** (this is needed for food cost reports-use F8 for a pick list), the **Unit of Measure** (use 'EA' for each serving), **Cost**, **Price Level 1(Dine In)**, **Price Level 2 (Dine Out)**, and **Shelf Life** if you intend to track products by shelf life.

On hand quantities can be entered when you define a product, but after that point in time all inventory quantities must be entered into **Inventory Management** or into **Product Receiving** when product is received from your vendor. The costs assigned to these inventory items must be accurate. These costs are used for food cost reports and to calculate cost of goods when the product is sold. If you adjust inventory for lost merchandise, you should also adjust your general ledger accounts (inventory and cost of goods sold) by doing a journal entry. Postings to inventory and cost of goods automatically occur when you sell product in the **Restaurant System** or the **Business System**.

The fields defined below are the ones most likely to be used in the **Restaurant System** and is not a complete list. For a complete list please see the Business Plus Accounting business system manual.

Product/Service:	Enter the Product/Service identification number. The identification number will be used throughout the system to identify a specific Product/Service. This value must be unique for every product. It can be helpful to start the Product/Service with a code to help you keep your products organized, such as "Bev_Cola," indicating the product is a beverage.
UPC Code:	Enter the product UPC code if the product already has a UPC which is different from the Product/Service code you entered above.
Description 1:	Enter Product/Service description. This description is printed on receipts and on standard reports.
Description 2&3:	Enter additional Product/Service description if needed. This description will be printed on invoices and can be printed on any custom product report.
Department:	Products are classified according to Department and Product Type. Department is primarily used on inventory reports. Use F8 to see a pick list of available departments. Additional departments may be defined from the define products menu.
Product Type:	Products should be classified according to type. Product Type is primarily used for sales reports. For example: You may want to assign a Product Type to all beverage products to see your total beverage sales. Use F8 to see a pick list of available Product Types. Additional Product Types may be defined from the Define Products menu.
Product/Service P/S:	Enter 'P' if the record created here is for a product. Enter 'S' if the record created here is for a service.

Product is Active:	Use this option to deactivate a product that you no longer sell. Deactivating a product will hide the product from the product list. Use this option instead of deleting a product. We do not recommend deleting products you have sold in the past.
Sales Taxable:	If this product is always non-taxable uncheck this option. Otherwise, leave it checked.
Tax Group:	Use F8 to select a Tax Group. Tax Groups may be defined under the Business System > Definitions > Sales Tax Table . Tax Groups may be used to differentiate the tax used on certain products such as alcohol.
Tax Included In Price:	Check this option if you would like the price of this product to include sales tax. The system will calculate what portion of the price is sales tax based on the sales tax percentage.
Goods Taxable:	Goods tax is a tax primarily used in Canada. If the product qualifies for goods tax, check this option.
Tax Dine In:	Certain items in certain states are not taxable if they are consumed in the establishment. Uncheck this option if this product is not taxable when dining in.
Tax Dine Out:	Certain items in certain states are not taxable if they are part of a to-go order. Uncheck this option if this product is not taxable when dining out.
Bar Tax %:	Bar Tax is a station specific tax. If a particular POS station is set to use Bar Tax, it will use Bar Tax for all products and will override the regular sales tax rate.
Unique Tax %:	Use this field to enter a unique tax percentage for this product. This percentage overrides your regular sales tax rate and does not add to it. I.e. If your alcohol gets charged 7% sales tax and 5% alcohol tax, enter 12.000.
Price (1-5):	We support five pricing levels for each product. For the restaurant POS system Price Level 1 is the Dine In price and Price Level 2 is the Dine Out price. Price Levels 3,4, & 5 can be used for special customers, i.e. distributor, wholesale, employee etc. Enter the unit price for this product in each of the price level fields. When customers are defined they can be assigned to a Price Level to get the price level 3, 4, or 5 pricing.

Cost: Enter the unit cost for this product. Example: If the unit of measure of this product is "Each" and the cost to you is \$1.00 each, enter 1.000. Be aware that this is only a default cost field. Normally the cost of goods sold comes from the inventory record which holds the exact cost of each product. To keep your default costs as accurate as possible use the **Move Latest Costs To Product Records** option in Inventory Management.

Happy Hour, Lunch, and Other Price: These price levels may be used for special pricing during particular days of the week and between certain times. Time and day scheduling may be found under **Restaurant System > Manager Functions > Misc Definitions > Prices**.

Member Price: Member Price is used if a customer has a membership date and number of days defined on their customer definition. See Define Customers for more information.

Sunday – Saturday Price: These price levels may be scheduled for certain hours for the day of the week to which they apply. Time scheduling may be found under **Restaurant System > Manager Functions > Misc Definitions > Prices**.

Inventory Information	
Unit Of Measure:	ea
Unit Weight:	0.000
On Hand:	0.00
Order Level:	0
Maximum Level:	0
Reorder Vendor 1:	
Reorder Vendor 2:	
Reorder Vendor 3:	
Vendor Conversion UM:	
Vendor Conversion ID:	
Vendor Conversion #:	0
Lead Time Days:	0
Default Location:	
Shelf Life Days:	0

Unit Of Measure: Enter the smallest unit that you will sell (usually each). Use this unit of measure to sell and to receive products. You may choose your own units. Example: You may want EA=Each, CS=Case, LB=Pound, HR=Hour etc. Remember, if you choose CS for case you must sell and receive by case.

Unit Weight: Enter the weight of one of the units of measure for this product.

On Hand: Enter the number of units of this product you have on hand. Example: If you selected case as the unit of measure and you have 5 cases, enter 5.

Order Level:	Enter the minimum number of units of this product you want to have available. Anything at or below this number will put this product on the reorder report.
Maximum Level:	Enter the maximum number of units of this product you want to have available. If the number of units available is at or below the reorder level the auto reorder function will order enough products to bring the available level up to the maximum level.
Reorder Vendor:	Enter the vendor number or use the Pick button to select the vendor from whom you will purchase this product during an auto reorder. When you select auto reorder from the vendor order option menu, each product that has fallen below its reorder level will be ordered from the vendor entered here.
Reorder Vendor 2&3:	Enter the vendor number or use the Pick button to choose your 2nd and 3rd choice for vendors for this product. Use this data for price comparisons at order time.
Conversion UM:	If this product can only be ordered from your vendor in a unit that you do not sell, enter the vendor order unit here. This UM will print on the vendor purchase order. When product is received from the vendor it is received using your UM, and your product id. It is much easier for you, as an end user, if you do not use a conversion unit of measure or a conversion number. If you do use these conversions, the conversion takes place when you receive the product in product receiving. As a result you will see different line item numbers (quantity ordered, cost, price, UM) on your purchase order verses your product receiving report.
Conversion Id:	If the vendor requires a different product ID on his orders, enter the vendors product ID here. The system will print this product ID on the vendor order.
Conversion #:	To convert from the vendor order unit to the unit you sell by, enter the conversion number here, (i.e., If you sell in each but you must order in case and a case contains 12 then enter 12 here.)
Lead Time In Days:	Enter the lead time for ordering this product from your vendor. The lead time is helpful in manufacturing lead time analysis.
Default Storage Loc:	Enter the location where you normally store this product. This storage location will appear on the product receiving screen. This will save you the trouble of entering the location. You can change

the location in the receiving screen if you store the product in a different location. If you are not tracking inventory storage locations, leave the field blank.

Shelf Life: Enter the number of days you allow this product to sit on the shelf. The product and product location will appear on the shelf life report if shelf time exceeds this number of days.

Exclude From Restaurant Discount:

Check this option to disable this product from being discounted.

Include In Loyalty Programs: Uncheck this option if you would like this product to be removed from loyalty program calculation.

Exclude From Restaurant Auto Gratuity:

Check this option to remove this product from auto gratuity calculation.

Sales G/L Accounts:

If you track product sales based on departments or product types, these products may be assigned separate general ledger accounts for sales (i.e., 4101-0000.) When a product which is assigned an account number is sold, the system will automatically post to that G/L account. This account should be defined in the general ledger prior to doing postings.

COG G/L Acct:

If you track product cost of goods based on Departments or Product Types, these products may be assigned separate general ledger accounts for cost of goods (i.e., 5105-0000.) When a product which is assigned an account number is sold, the system will automatically post to that G/L account. This account should be defined in the general ledger prior to doing postings.

3.4 Define Side & Modifier Lists

Use this function to define your sides lists. You can have up to 9,999,999,999 sides lists. These lists are used when an entree is assigned to them. When the entree is selected by the server the list pops up automatically and the server selects the sides from the list. The selected sides will be printed on the cook's ticket with the selected item. Each side list item can have a price assigned to it.

Our software uses the multiple language support found in your operating system (I.e. Windows 7). To use multiple languages you must first learn how to configure your operating system to use an alternate language. Then you can define your lists in that language.

3.5 Per Topping Price Matrix

Some restaurants want to make ordering as simple as possible to speed up operations. This is important in 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 i.e. Large, Medium, Small. First, you set up the matrix for each type of pizza. You charge per topping and set up a matrix of prices. For example, for a large pizza you may charge \$10.00 as the base price and \$1.00 for each addition topping. So a one topping large pizza would cost \$11.00. If you had one topping on the left side and two toppings on the right side you would probably make the price for a 1.5 topping pizza in your matrix $\$10.00 + 1.50 = \11.50 . When you set up your matrix only the prices of the toppings are entered into the matrix. The base price of the pizza is entered when the item is defined as a product. Products are defined by pressing the **Define Product** button on the manager screen. To define your matrix prices select the **Define Per Topping Price Matrix** button found on the manager screen. There are three default pizza matrix sizes: Large, Medium, and Small. However, you can add as many different product types as you like to the matrix and define the prices for each.

When you have finished defining your matrix prices, you will need to assign the menu items that you want to use matrix pricing to one of the matrixes. This is accomplished when you define menu items. To do this select the button **Define Menu Items** on the manager screen. When you add or modify an item for a menu one of the fields on the screen is labeled **Topping Price Matrix**. If you enter a matrix name into this field (i.e. Large, Medium, Small) the software will use that matrix pricing when this item is purchased by a customer. If you selected a large pizza with one topping and the price came from the price matrix, and then you selected shrimp from one of the priced toppings lists, the total price of the pizza would be the price of the one top large matrix pizza plus the price assigned to shrimp in the priced toppings list.

3.6 Create Recipes For Items

If you are seriously committed to tracking inventory, you need to use entree recipes and side recipes. Recipes allow you to define items that need to be pulled from inventory when an entree or mixed drink is sold. Typically, these would be items like 8oz sirloin, mixed vegetables, cheese, olives, garnishments, bread, spices etc. First, these items need to be defined as products. The unit of measure assigned to them needs to be small enough to allow practical assignments in the recipes and also needs to be a practical unit for ordering the item. For example, if milk was part of the recipe its unit of measure in its product definition should be some reasonable unit like gallon, so that you can specify .25 for 1/4 gallon in your recipe and still order milk from your vendor in gallons. The items defined for a recipe are automatically removed from inventory when you post your daily sales.

3.7 Define Table Areas

There are seven table areas that can be defined. There is a table area tab for each area. In this definition screen you assign the starting and ending table numbers for each area. Table numbers cannot overlap from one area to the next. You must not assign tables 900-999 to your table areas since these tables are used for quick sales when the Quick Sale button is pressed on the sales screen.

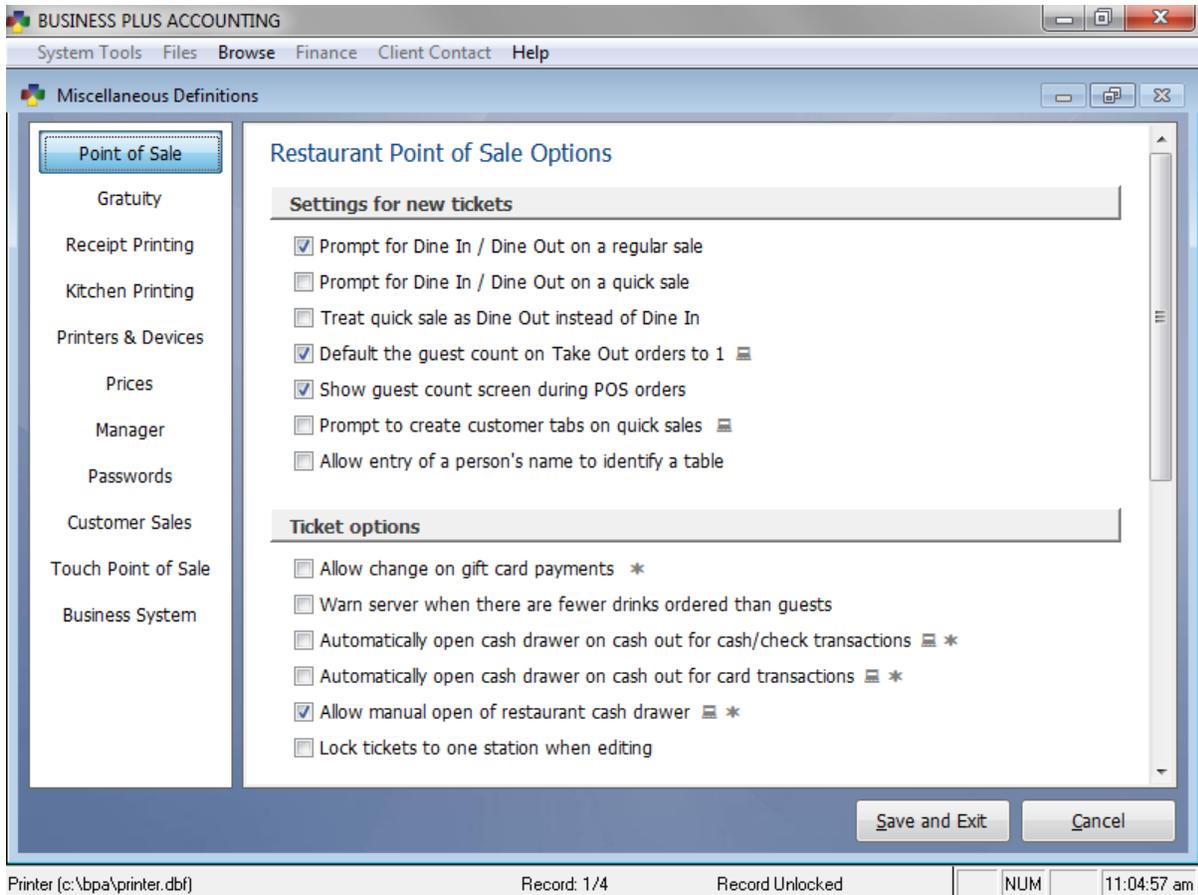
3.8 Assign Menu Names

You can assign your own names to the menu tabs. This allows you to create menu names that are more meaningful to your business. It also allows you to use another language for your servers if needed. You have 14 different menus that occupy two rows. When you rename your menus you must use names that are reasonably short. If the names you use are too long you will force the menus to occupy three lines. Also, you cannot change these names if you have open tables or if you have not posted your closed tables. Our software uses the multiple language support found in your operating system. To use multiple languages you must first configure your Windows operating system to use an alternate language. Then you can define your menus in that language.

3.9 Define Comp & Removal Reason Codes

You have the option to create pre-defined codes to pick from when you need to remove or comp an item on an order (bad flavor, server error, cooked wrong, etc.) You can track your removed and comped items through the removed and comped items reports in the **Security Events Reports** section of the **Restaurant Reports** menu.

3.10 Miscellaneous Definitions



The miscellaneous definitions screen is a page full of options that allows you to fine tune and customize your system to run the way that you need it to. This menu allows you to pick from over 150 options and choose your own settings for the system. This option is essential for system setup and allows you to modify everything from what functions need to be password protected, what printers to use, what to print on your receipts, and hundreds of other options.

3.10.1 Point of Sale Options

Prompt for Dine In / Dine Out on a regular sale:

The server will be prompted to choose whether the order is a dine in or dine out sale on a regular order.

Prompt for Dine In / Dine Out on a quick sale:

The server will be prompted to choose whether the order is a dine in or dine out sale when using the quick sale option. This option is useful in quick serve environments.

Treat quick sale as Dine Out instead of Dine In:

The system will automatically treat a quick sale order as a dine out order.

Default the guest count on Take Out orders to 1:

If a sale is marked as dine out it will automatically have a guest count of 1.

Show guest count screen during POS orders:

The system will prompt the server to enter a guest count on every order.

Prompt to create customer tabs on quick sales:

Note: This is a per-station option. When starting a quick sale you will have the option to start a tab using a credit card. Note you must be using integrated credit card processing to use this function.

Allow entry of a person's name to identify a table:

The system will prompt for a customer's name when the order is started.

Allow change on gift card payments:

The server will have the option to cash out the remainder of a gift card.

Warn server when there are fewer drinks ordered than guests:

Before the server logs out or sends the ticket to the kitchen, the system will notify them there are not enough drinks on the order. The system determines the number of drinks by looking at how many items on the order are assigned to the product types BEV, BER, LIQ, or WIN.

Prevent cooks ticket from printing when there are fewer drinks ordered than guests:

Prevents the server from being able to send the order to the kitchen until there are enough drinks on the order that are assigned product types of either BEV, BER, LIQ, or WIN.

Automatically open cash drawer on cash out for cash/check transactions:

The cash drawer will automatically open when a cash or check transaction is cashed out.

Automatically open cash drawer on cash out for card transactions:

The cash drawer will automatically open when a card transaction is cashed out.

Allow manual open of restaurant cash drawer:

Enables or disables the **Open Drawer** button in restaurant sales.

Lock tickets to one station when editing:

Prevents opening of an order on one station that is currently being modified on a different station.

Enable quick sales:

This is a per-station setting. Enables or disables the use of quick sales. You may also enable automatic quick sales which is useful in a quick serve environment. This option starts a quick sale with the push of a menu button.

Enable quick cash out buttons on POS screen:

Enables or disables the yellow quick cash out buttons on the Restaurant Sales screen.

Include 'On Account' with quick cash out buttons:

Adds an **On Account** button to the quick cash out buttons in Restaurant Sales.

Display order for active tables: Choose whether to arrange active tables by table number or table name.

Enable Hold and Fire

:

When a server selects **Send to Cook** in Restaurant Sales, they will be presented with the hold and fire screen. This allows them to select which items they would like to send to the kitchen now and which items they would like to send at a later time.

Show all tables on this station: This is a station specific option. When this option is selected, the table screen will show every server's orders and not just their own. This is useful in an environment where you have a separate cashier.

Disable ticket closing on this station:

This is a station specific option. Disables tickets from being cashed out.

Allow entry of a reason code for removed and comped items:

When a server comps or removes an item from a ticket, they will be prompted to select a reason code for performing that action, such as "Server Error" or "Upset Customer." Reason codes may be defined in restaurant Manager Functions.

Automatically prompt for seat number after an item is entered:

Server will be prompted to select a seat number for the guest at the table after they click on a menu item.

Automatically close the change due screen after 'X' seconds:

Enter the number of seconds before the screen that shows change due automatically closes.

Restaurant POS Button Setup: There are 3 buttons on the restaurant sales screen that may be swapped with a number of buttons from the **Misc** menu in Restaurant Sales. Use this option to swap those buttons.

Activate scheduled orders 'X' minutes before scheduled time:

Here you may define the threshold when a scheduled order will become active. When the order becomes active a cook's ticket will automatically be sent to the kitchen and the scheduled order notification on the table screen will turn red.

Show scheduled orders and web orders that are ready to process:

Check this option if you would like scheduled and web orders to automatically be shown on the table screen when they become active. This is a per station option.

3.10.2 *Gratuity Options*

Enter number of guests required for auto gratuity:

Select the number of guests required for the system to automatically add gratuity.

Enter the percent for auto gratuity:

Enter the percentage of auto gratuity to be charged if the guest count above is reached.

Calculate auto gratuity prior to any meal discounts:

Auto gratuity will be calculated before any discounts are applied to the order.

Charge sales tax on auto gratuity:

Most states do not require sales tax to be charged on auto gratuity. Select this option if your state requires sales tax on auto gratuity.

Print gratuity line on 1st receipt: This option will print a gratuity line on the ticket that is printed when the server selects **Print Ticket**.

Remove gratuity line on credit card authorization slip:

This is a per station option. If your establishment does not except tips, check this option.

Display auto gratuity % on customer receipt:

If auto gratuity is used, the percentage will be displayed on the customers receipt.

Print "Gratuity Not Included" on receipt:

This is a per station option. Select whether or not to include a "Gratuity Not Included" text message at the bottom of the receipt.

Print suggested gratuity on receipt:

This option allows you to display three percentages and dollar values at the bottom of the receipt for suggested gratuity. You may specify the percentages to calculate. Suggested gratuity is calculated before tax.

Enter % to deduct from server tips for credit card charges:

This option allows you to deduct a percentage from credit card tips to help cover the cost of credit card processing on those tips. Enter the percentage to deduct.

Allow server to enter tips when he/she clocks out:

When the server clocks out they will be presented with a screen allowing them to claim the amount of tips they earned for tax purposes.

Warn server when credit card cash out has no tip:

When a server attempts to cash out a credit card sale they will be warned if there has been no gratuity added to the order.

Default % of tippable sales to claim as tips:

This is the default percentage of cash tippable sales that will automatically be calculated as tips when approving server clock out or if the server is claiming tips at clock out.

Treat dine out sales as exempt from gratuity for declaring tips and tippable sales:

If the majority of your dine out sales are pickup orders or you have an employee that handles dine out orders that is not paid a server's hourly rate, check this option. This will allow servers to not have to claim tips on dine out sales.

Enter service fee % to charge Dine In orders:

A service fee will be applied to dine in orders if a percentage is specified here.

Enter service fee % to charge Members:

If a customer account is marked with a membership date and the account is applied to an order they will be charged this fee.

Pay auto-gratuities to employees \ Pay charge tips to employees:

If these options are set to pay at shifts end, the system assumes you will be paying out tips to the server from the cash drawer. If they are set to pay out at payroll, the system will report these tips to pay at payroll on the Daily Sales and Tips Report and the Time Clock Report. If you are using the BPA payroll module these tips will also be included in the payroll check.

3.10.3 *Receipt Printing Options*

Receipt layout:

Here you may enter your company information to be printed on your receipts. The name, address, city, and telephone fields print at the top of the receipt. Notes 1-6 will print at the bottom. These fields may be used to list a website or short return policy.

Print receipt when cashing out: This is a per station option. This will automatically print the customers receipt when a sale is closed.

Print credit card transaction slip at the end of credit card sale:

Use this option to print a final receipt when an order is closed.
This receipt shows the actual gratuity that was applied to the order.

Print 'X' copies of the credit card slip:

Here you may specify how many copies of a credit card slip you would like printed if you are using integrated credit card processing.

Minimum amount to print credit card signature line:

Some states only require a signature on a credit card slip if the sale is over a certain dollar amount. Here you may specify that amount if you would like the signature line left off of the receipt.

Print authorization receipts for on account sales:

This option will allow you to print an authorization slip with a signature line for an on account sale.

Print receipt at the end of an on account sale:

When an on account sale is closed a receipt will be printed.

Print size for receipts:

Select whether you would like the print size on the receipt to be normal or large. This option requires a compatible receipt printer.

Print server name on receipt:

This option will print the server's first name and last initial on the customers receipt.

Print table number on customer receipt:

Choose whether or not to print the table number on the customers receipt.

Print table name on customer receipt:

Choose whether or not to print the customer's name on the receipt.

Print line items on credit card slip:

If selected, this option will print all the items on the credit card receipt as opposed to just a subtotal, tax, and total.

Print product description line 2 and 3 on receipt:

If a product has a second/third line a description it will be printed on the customer receipt.

Print sides on customer receipt: Use this option to print all sides and modifiers on the customers receipt.

Print prices for sides on customer receipt:

You must first select to print sides on customer receipt. If selected, you may also choose whether to include the price of those sides. If you do not show the price, it will be automatically added into the price of the item the side is modifying.

Print custom special notes on customer receipt:

Select this option to print custom special notes on the customer receipt.

Print daily transaction number as order number on receipt:

Normally the order number on the receipt is an ever-increasing number that does not reset. If you choose, you may print an order number that can be reset. This is particularly useful in quick serve environments. This order number is reset when the Z-1 report is run.

Combine identical items on customer receipt:

If identical menu items are rung in on a ticket, this option will combined them and show a quantity instead of listing each one as a separate line item.

3.10.4 Kitchen Printing Options

Auto print Cook's Ticket when table is cashed out:

Use this option to automatically send the cooks ticket when an order is closed. This option is particularly useful in a quick serve environment. Note: If a server has already pressed **Send to Cook** before the order is cashed out, this option will attempt to resend the ticket at cash out.

Disable 'Send To Cook' button on this station:

Select this option to disable the send to cook button. This is a station specific option.

Print Cook's Ticket at receipt printer for items not assigned to the Cook's Printer:

This option will print a prep ticket at the receipt printer for items that are not assigned to a kitchen printer. Use this option if you require a prep ticket for drinks or other items that do not normally go to the kitchen.

Warn on 'Server In' or table change when prior items need to go to Cook's Printer:

If a server tries to server in or select a different order, the system will notify them if the order has not yet been sent to the kitchen.

Warn user on cash out for items not send to Cook's Printer:

When a server tries to cash out an order they will be notified if the order has not been sent to the kitchen.

Prompt to reprint all items when new items are sent to cook:

If this option is selected the server will be prompted to **Send Entire Order or New Items Only** if the order has already been sent to the cooks. If not selected, only new items will be sent. You may also resend the entire order by selecting the **Misc** button on the restaurant sales screen and selecting **Reprint Cooks Ticket**.

Print size for Cook's Printers: Select whether you would like the print size on the kitchen ticket to be normal or large. This option requires a compatible kitchen printer.

Print guest count on Cook's Ticket:

Enable this option to print the number of guests on the kitchen ticket.

Print item numbers on Cook's Ticket:

The item number for each item will be printed on the kitchen ticket.

Print seat numbers on Cook's Ticket:

The seat number for each item will be printed on the kitchen ticket.

Print item price on Cook's Ticket:

You may choose whether or not to print prices on the kitchen tickets.

Print item quantity on Cook's Ticket:

Identical items that are entered using either the **Repeat Item** button or **Change Quantity** will be printed showing the quantity.

Print button text/product description/alternate cook's text for items on Cook's Ticket:

Here you may specify what text you would like printed for the description of the item on the kitchen ticket. You may choose the actual text of the menu button, the product description from the product definition, or the alternate text from the menu item definition. You may choose to print more than one description but typically only one of these options is chosen. If more than one is chosen you will see more than one description on the kitchen ticket for each item.

Use print order on Cook's Ticket:

Each menu or side item in the software may be assigned to a print order group. This option allows the software to use the assigned group to determine the order in which the items will print. I.e. All items in group 1 will print first, then items in group 2, etc. Groups may be assigned using the **Change Menu Item Assignments** function under the **Define Menu Items** menu.

Print already fired groups on Cook's Ticket:

If using the hold and fire option, choose whether or not you would like items that have already been fired to print when unfired items are sent. Already fired items will show up in a separate section noting they have already been fired.

Print hold groups on Cook's Ticket:

If using the hold and fire option, choose whether to print items that are marked to hold along with items that are to be fired. Hold items will show up in a separate section noting they have been held.

Print station label on bottom of Cook's Ticket:

Here you may enter a line of text to print at the bottom of the kitchen ticket to identify which station it came from. I.e., "Drive Through."

Print removed items ticket for cook if items have already been sent to cook:

Enable this option to print a separate cooks ticket when an item is removed that has already been sent to the cook.

3.10.5 *Printers and Devices*

- Assign printers:** Up to 7 printers may be assigned to each station. Printer assignments are station specific. Printers assigned here must first be installed in Windows through the add printer wizard. Select the **Load** button on the right to select from this list of printers. Items must be specifically assigned to kitchen printers in **Define Menu Items** for the item to go to the appropriate printer.
- Enable dual cash drawer:** Use this function only if you have two cash drawers attached to one station. You must then use the **Dual Cash Drawer Setup** to define which printer each cash drawer is attached to. If enabled, the server will be prompted to select a drawer number to use when they server in.
- Enable POS pole display:** Enable this option only if you have a separate customer pole display and it is installed and configured. The pole display driver must be defined in the **Business System** under **Definitions > Printer and Form Setup**.
- Display pole driver:** If you are using a customer display pole, check the option above and then select the **Load** button and select the display pole driver from the list of printers.
- Weight Scale Type:** If you are using an integrated weight scale with the BPA software, you need to select the type of scale you will be using.
- Weight Scale Com Port:** Enter the com port number the scale is attached to.
- Weight scale label price digits:** In a deli type environment where items are sold by the pound, the price of the item is often embedded in the bar code that is printed by the produce scale. Here you may select whether to read the price using 4 or 5 digits in the barcode.
- Enable USB HID Credit Card Scanner:**
Select the correct type of credit card swipe you are using with the system. MagneSafe card swipes typically have a lock symbol engraved on the side of the card swipe.
- Use OPOS scanner:** Check this option if you are using an OPOS scanner with the BPA software. Typically you will only check this options if instructed by a BPA technician. The OPOS scanner profile must be configured before this option is checked.

3.10.6 *Pricing Options*

Special pricing start/end times: Here you may specify start and end times to be used for special pricing. For happy hour, lunch, and other pricing you may also specify the days of the week the pricing is active by entering a "Y" in the appropriate box. Keep in mind that the time format is hh:mm:ss and all times must be entered in military time.

Pre-defined discounts: Here you may specify predefined discounts. These discounts will be available to choose from on the discount order screen in restaurant sales. The discount name will also appear on the discounted items report so you can monitor the types of discounts being given.

3.10.7 *Manager Options*

Disable the use of checks for cashout:

Enable this option to not allow employees to cash out orders with the check payment type.

Enable on account restaurant sales:

This option allows employees to close out restaurant sales to a customer account. The on account option will appear on the **Close Table** screen in restaurant sales.

Enable product bar tax for this station:

This is a station specific option. If enabled, the station will use the bar tax value for every product in the system whether there is a value specified or not.

Minimum amount required to charge credit cards:

Enter a value here to disallow cashout with a credit card for a sale below the specified dollar amount.

Assign terminal cash drawer number:

Each terminal that has a cash drawer should be assigned a unique cash drawer id between 01 and 99. This cash drawer id will be used when closing out the drawer in end of day functions as well as for certain cash drawer reports.

Show room charge button on Cashout screen:

Enable this option if you are using the integrated Hotel and Property Management software and would like to allow restaurant sales to be charged to a room.

Accounts for Quick On Account screen:

Here you may specify up to 5 quick on account buttons. You may pick the accounts that you use most. These buttons will appear on the **On Account** screen when you go to place an order on a customer account. You must enable on account restaurant sales to use this function.

Enable employee charges:

In order to use this option you must also enable on account restaurant sales. This option allows you to track employee charges by cashing out employee charges and then using the employee charge report in manager functions to settle charges with your employees.

Log employees in using:

Here you may specify whether your employees will be logging in by manually entering their employee number or if they will be using employee swipe cards. Note that once cards are enabled, employees will no longer be able to log in using employee numbers. Employee cards are available through the sales department.

Require manager approval for employee clock out:

This is a station specific option. Enabling this option will require that your employees be approved to clock out using the **Approve Server Clock Out** function under the manager menu. This allows you to settle sales and tips with the server before they can clock out.

Print employee time clock totals on receipt printer at clock out:

Enable this option to print a weekly time clock report for the employee each time they clock out.

Allow employee to clock out with open tables:

Choose whether or not to allow a server to clock out if they still have open orders. If disabled, servers can either close their tables or transfer them to a different server before clocking out.

Print sold quantity for each product group on Daily Sales & Tips Report:

Select this option to print the number of items sold in each product type on the server sales and tips report.

Enter default report start and end time:

Enter the start and end time to use for reports. Time must be entered in military time. Any report that runs by time of day will use the time specified here as the default time. We suggest that you always cover a 24 hour period to ensure accurate reporting. I.e. If you are open until 2:00 am enter a start time of 03:00 and an end time of 02:59 to ensure all of your sales information is accounted for.

Use default report end time to determine accounting business date:

Select this option if you are open past midnight. This option will ensure that any sales done between midnight and your closing time will be grouped with the previous business day on the monthly and yearly sales reports. i.e. If you open on Oct. 11 at 4pm and close Oct. 12 at 2am all the sales closed Oct. 12 from 12am to 2 am will be reported as part of the business day on Oct. 11.

Restaurant Summary Report Options:

These options allow you to customize your daily sales and tips report. You may also configure the system to automatically e-mail a summary report each day. In order to use the e-mail option you must set up the **E-mail Configuration** under the **Business System** tab in **Misc Definitions**.

Auto log out employee after cashout:

After a sale is cashed out the system will require a server to log in before using the system. This allows the server to walk away from the system without any further action to secure it.

Auto log out employee after printing cooks ticket:

After pressing send to cook the system will require a server to log in before using the system. This allows the server to walk away from the system without any further action to secure it.

POS employee time out in seconds:

They system will automatically log a server out after the specified amount of idle time. After that time a server will be required to log in before using the system.

Mark tables as “Ordered” when:

Select whether a table should be marked as ordered when the first item is entered or when the ticket is sent to the cook. This status is displayed on the **Table Management** screen in restaurant sales.

Clear table status ‘X’ minutes after table close:

The table is removed and changed to an available status so many minutes after the table is closed. This allows the bussers time to clear the table before it is made available.

3.10.8 Password Options

In order for the following password options to work a master password must be defined in the system and the **Restaurant Manager Password** option must be activated under **Business System > Definitions > Passwords for Modules > Activate Module Passwords**.

Require manager password to manually open cash drawer:

A password will be required to use the **Open Drawer** button in restaurant sales.

Require manager password for petty cash payouts:

A password will be required to use the petty cash payout function under the **Misc** button in restaurant sales or touch screen pos.

Require manager password to comp items:

A password will be required to use the comp items function.

Require manager password to discount items:

This is a station specific option. A password will be required to use the discount by percent function.

Require manager password to add security event menu items to an order:

A password will be required to add any menu item that has been marked as a security event on the menu item definition to an order.

Require manager password to create gift cards:

A manager password will be required to sell a gift card. You must be using gift cards provided by Business Software Solutions to use this function.

Require manager password to reprint a Customer Ticket:

A password will be required to reprint a customer's receipt.

Require manager password to reprint entire Cook's Ticket:

A password will be required to resend the entire cook's ticket.

Require manager password to redeem loyalty credit and punch cards:

If you are using the loyalty system in the software, a password will be required to apply the loyalty credit to the order.

Require manager password to receive payment by gift certificate:

A password will be required to use the redeem certificate product.

Require manager password to split a ticket:

A password will be required to split a ticket between multiple guests.

Require Definitions password to create customers from Point of Sale:

The definitions password will be required to create a new customer account from the restaurant sales screen.

Require manager password to close a credit card table without a credit card authorization:

If a sale is marked as a credit card sale but no credit card has been authorized, a manager's password will be required to close the order.

Require manager password to remove items at any time for this station:

This option is station specific. A password will be required to remove an item from an order at any time.

Require manager password to remove items after they are printed at Cook's Printer:

A password will be required to remove items from an order only after they have been sent to the cook's printer.

Require manager password to remove items after the server leaves their current table:

If a server switches to a different order or servers out, a password will be required to remove items from that order.

Require manager password to remove items after printing the receipt:

After the customers receipt is printed, a password will be required to remove items from that order.

Require manager password to edit items after they are printed at Cook's Printer:

A password will be required to change the modifiers on an item after it has been sent to the kitchen printer.

Require manager password to merge tables in POS Misc Screen:

A password will be required to use the **Merge Two Tables** function under the **Misc** button in restaurant sales.

Require manager password to change table numbers in POS Misc Screen:

A password will be required to change the table on an order using the **Change Table Number** function under the **Misc** button in restaurant sales.

Require manager password to change gratuity in POS Misc Screen:

A password will be required to change the auto gratuity percentage using the **Set Auto Gratuity Percent** option under the **Misc** button in restaurant sales.

Require manager password to enter equipment pickup function:

A password will be required to use the equipment pickup function under the **Misc** button in restaurant sales.

Require manager password to enter table management in POS Misc Screen:

A password will be required to access the **Table Management** area under the **Misc** button in restaurant sales.

Require manager password to change print order in POS Misc Screen:

A password will be required to change the cook's printer order under the **Misc** button in restaurant sales.

Require manager password to transfer an order to Touch POS:

A password will be required to transfer a table to the Touch Screen POS in the business system.

Require manager password to transfer tables between servers:

A password will be required to transfer a table from one server to another using the **Server Table Transfer** function under the **Misc** button in restaurant pos.

Require POS manager password to access End Of Day functions:

A password will be required to access **End of Day Processing** from the restaurant menu.

Require manager password to print Daily Sales & Tips Report for all servers:

A password will be required to run the daily sales and tips report if 000 is entered as the employee number.

Require manager password to print Daily Sales & Tips Report for individual servers:

A password will be required to run the daily sales and tips report if an individual's employee number is entered.

Require manager password to clock in more that 'X' minutes prior to employee schedule:

You may use this function only if you are using the employee scheduling function that is built into the software. A password will be required to clock in more than the specified number of minutes before the employee is scheduled.

Password to use for time clock reporting and editing:

Select whether to require restaurant manager access or payroll access in order to edit the time clock.

Require manager password to return items in Touch POS:

A password will be required to perform a return order in touch screen POS in the business system.

Require manager password to void items in Touch POS:

A password will be required to void items from a sale in touch screen POS.

Require manager password to discount/change item price in Touch POS:

A password will be required to use the discount or change price function in touch screen POS in the business system.

Require POS manager password to reprint receipt in Touch POS:

A password will be required to reprint a customer's receipt in touch screen POS in the business system.

Require POS manager password to place current transaction on hold:

A password will be required to use the hold order function in touch screen POS in the business system.

Require master password to modify or delete invoices:

The master password will be required to modify or delete invoices in the customer orders module under the business system.

Require POS manager password to edit price in Customer Orders:

A password will be required to edit the price or time on a sale in the customer orders module under the business system.

Require POS manager password to edit order header information:

A password will be required to modify order header information such as the order date in customer orders.

Require POS manager password to apply memos on order screen:

A password will be required to apply a credit memo to a customer order in the customer orders module under the business system.

3.10.9 Customer Sales

Enable customer profile on orders screen:

If enabled, you will be presented with a screen enabling you to change the customer's name and contact information when creating a customer order in the business system.

Enable quick point of sale input: Select this option if you are using the customer orders module with a barcode scanner. This option moves the cursor down to the next line after an item is entered.

Enter quick point of sale account:

If you use the customer orders module for regular cash sales, you may specify which account to use for those sales. When one sale is created with this customer account and cashed out, the following sale will automatically use the same account information.

Default customer order invoices to order / sale:

In customer orders you have to option of marking a transaction as a sale or an order. Here you may specify whether you would like the default setting to be order or sale.

Require sales person in customer orders:

Select whether the sales person id must be entered to complete a sale in customer orders.

Add commission % prompt to orders screen:

Enable this option to allow you to key in a commission percentage at the time of the order.

Allow product pick short:

Enable this option to allow your on hand quantity to go less than 0. Otherwise the system will ring the product up as backordered at the time of the sale.

Allow applying of credit memos on order screen:

Select whether to allow credit memos to be applied when cashing out a customer order.

Add note/shipping address prompt for POS invoices:

Select whether to have the system give you the opportunity to enter notes or change the shipping address in customer orders.

Enter # of invoice copies to print:

Select the number of copies of the invoices you would like printed for customer orders.

Print signature line on large invoice if credit card payment applied:

Select whether to print a signature line on a full size invoice if a credit card is used to process the order.

Print vendor order for drop shipments:

If a customer sale is marked as a drop shipment when closing out the order and a vendor is assigned to the product, the system will automatically print a vendor order for the product.

Create default invoice notes: Here you may define default notes that will be printed on each invoice if the **Include Notes** option is selected when printing the invoice.

Create default quote notes: Here you may define default notes that will be printed on each quote.

Mark web orders as paid when converting to invoices:

This option is for use with our E-commerce module. When importing orders from E-commerce into customer orders you may choose to have the invoices marked as paid.

Force credit card authorization for internet orders:

This option will require and credit card authorization when using the E-commerce module.

3.10.10 Touch Point of Sale

Show images for products in Touch POS:

If enabled, an image pane will appear in the upper right portion of touch screen POS. If there is an image associated with the product it will be displayed at the time of the sale.

Print Touch POS receipt when cashing out:

This is a per station setting. Select whether or not you would like the customers receipt to automatically print when cashing out a sale in touch screen POS.

Print receipt for debit card transactions:

Select this option to print a receipt for debit card transactions at cashout.

Allow change on gift card payment:

If enabled, an employee will be allowed to cash out the remainder of a gift card when it is used for a sale in touch screen POS.

Automatically open cash drawer on cash out:

Select whether you would like the cash drawer to automatically open at the end of each sale.

Allow manual open of restaurant cash drawer:

Select whether to enable or disable the open drawer button in touch screen POS.

Touch POS Button Setup: Up to seven miscellaneous POS functions may be displayed on the POS sales screen. Here you may select which functions to display.

POS Summary Report Options: These options allow you to customize your daily sales report for touch screen POS. You may also configure the system to automatically e-mail a summary report each day. In order to use the e-mail option you must set up the **E-mail Configuration** under the **Business System** tab in **Misc Definitions**.

Alternate Currencies for Touch POS:

The Touch Screen POS software has the ability to show order totals in an alternate currency if needed. Here you may specify the alternate currency and the conversion rate. The alternate currency will be displayed on the receipt.

3.10.11 Business System Options

Post Cost Of Goods and Inventory automatically:

If this option is enabled when you post your table sales the system will automatically deduct your inventory and post your food cost to the general ledger.

Show general accounts when browsing general ledger:

When using the **Browse** option at the top of your screen to browse GL accounts, you may choose whether or not to display general accounts.

Print receipt to be signed for credit card payments in A/R:

Select this option to print a credit card receipt when receiving a credit card payment in A/R.

Enter default currency symbol: Enter your countries currency symbol to be used by the software.

Automatically generate customer account numbers:

This option will allow the system to generate customer account number instead of allowing you to specifying the account number.

Enter a New Starting Number For Auto Account Numbers:

Here you may specify the starting account number for generating automatic account numbers.

Automatically generate Product ID's when adding new products:

This option will allow the system to automatically generate product ID's when adding new products to the system.

Enter a New Starting Number For Auto Product ID's Numbers:

Enter the starting product number to be used when automatically generating product ID's.

Automatically generate UPC's as numbers when adding products:

This option will allow the system to automatically generate UPC codes when adding new products to the system.

Enter a New Starting Number For Auto UPC Numbers:

Enter the starting product number to be used when automatically generating UPC codes.

Data archival:

The BPA software is designed to archive information after a certain number of days. BPA does not delete data. Rather, we move it into a separate database that is not regularly used by the system in order to keep the software running optimally. Occasionally you may need to adjust these archive settings. Adjusting them shorter may improve performance in the software. Adjusting them longer will allow you to run reports on more information. The software must be closed on any network clients before adjusting these settings. It is recommended that you only adjust these settings from your BPA server computer.

Archive sales order records after 'XXXX' days:

This archive setting primarily effects how much data is available for business system reports as well as the monthly and yearly sales reports in the restaurant system.

Archive posting transactions after 'XXX' months:

This archive setting effects how much information is available in the general ledger.

Archive time clock records after 'XXXX' days:

Time clock records will be archived after the time period specified here.

Archive POS sales records after 'XXXX' days:

This archive setting primarily effects how much data is available for restaurant system reports, not including the monthly and yearly sales reports.

Set default customer search field:

Here you may select the account number, customer name, or phone number as the field you will use most often to search for customer accounts.

Set default product search key field:

Here you may select either product or description as the normal search field you will use to find products.

Select product barcode label size:

Select whether you will be using a small (2") label or large (4") label when printing barcodes.

Enable daily inventory snapshot:

If you would like to use the daily inventory snapshot report functionality, this option must be enabled to enable the actual snapshot to take place.

Starting day of work week:

Here you will want to specify the starting day of your work week for payroll. This setting will be used by the time clock report as well as for calculating weekly overtime.

Starting time of work day:

The system uses this time to determine when a pay period starts on the day selected above. Any shift that ends before this time will go toward the previous week on the time clock report. Any shift that overlaps this time on the day selected above will be split between two pay periods.

Award weekly overtime after 'X' hours per week:

Enter the number of hours during the week before the system starts calculating overtime. The default value is 40.

Award daily overtime after 'X' hours per day:

If your state requires you to pay daily overtime, enter the number of hours a day an employee can work before the system calculates overtime.

FTP backup server:

These settings are only intended to be used with the BPA corporate backup and restore functionality which is used to upload store information to a corporate office. For more information on this feature please contact Business Software Solutions technical support.

Email Configuration:

Use this option to configure your outgoing mail server settings to be used for sending automatic reports, invoices, quotes, statements and direct deposit slips. You may also specify the default subject and text to be included in the email for invoices, quotes, and statements.

Online Gift Card Setup:

This configuration is intended for use only with Business Software Solutions' online gift card service. This service allows you to sync gift card information between multiple locations. Please contact the Business Software Solutions sales department for more information.

Backup Configuration:

Here you may specify up to three locations to store a backup of the BPA software. This backup will be created when you exit the software and choose to run a Backup and Exit. These storage locations may be a local drive, network location, or flash drive.

3.11 Approve Server Clock Out

After the manager has reviewed the server's sales and tips report and has received the correct cash from the server, the manager will use this function to approve a server for clock out. If the system is configured to use this option the server will be unable to clock out until they have been approved by a manager. To approve a server to clock out enter their employee number on the keypad and then select the **Load Value** button next to server #.

Approve Server Clock Out

Approve Server Clock Out

Employee Test

Server #: **Load Value**

1	2	3	Auto Gratuity:	<input type="text" value="16.20"/>
4	5	6	Charged Sales:	<input type="text" value="261.95"/>
7	8	9	Charged Tips:*	<input type="text" value="42.00"/>
0	Clear		Tip % of Charged Sales:	<input type="text" value="16%"/>
			Other Sales:	<input type="text" value="81.00"/>
			Cash Tippable Sales:	<input type="text" value="0.00"/>
			Tip %:	<input type="text" value="15%"/> Load Value
			Cash Tips:	<input type="text" value="0.00"/> Load Value
			Declared:	<input type="text" value="40.74"/>

*An amount of \$1.26 will be charged to the server for credit card tip fees.

Save **Cancel**

You can then choose to adjust their cash tips by either adjusting the tip % or adjusting the cash tip amount. This may be done by entering the new value on the keypad and then selecting the **Load Value** button next to the appropriate option. Press **Save** when finished. An explanation of how each value on this screen is calculated is listed below.

- Auto Gratuity:** This box reports any auto gratuity that was recorded on the closed sales.
- Charged Sales:** This box shows any sales that were closed with a tip with a payment method of credit card, gift card, or placed on account.
- Charged Tips:** This field reports any tips left on a sale that was closed with a credit card, gift card, or placed on account.
- Tip % of Charged Sales:** This percentage is automatically calculated based on the charged sales and charged tip amounts.

Other Sales:	Other Sales includes sales that were closed with auto gratuity or items that are marked to be excluded from gratuity. Because auto gratuity is not treated as a tip and is considered as wages, tips do not need to be claimed on this sales amount.
Cash Tippable Sales:	This field includes cash sales as well as any charged sales on which no tip was added. If no tip was added to a charged sale the system assumes the patron left a cash tip. There is an option to exclude dine out orders from this total which will be discussed later.
Tip %:	This field allows you to claim a percentage of your cash sales as tips. You may change this percentage by entering the percentage on the keypad on the left and then selecting Load Value.
Cash Tips:	Cash Tips is the amount of cash tips that you are claiming. This amount may be calculated by entering the percentage above or you may adjust this amount by entering the tip amount on the keypad on the left and then selecting Load Value.
Declared:	The declared field contains the amount of charge and cash tips claimed.

3.12 Void Closed Table

If a server has made a mistake on a closed table and the table needs to be removed, you can remove the table here. This can only be done after the table has been closed by the server and before you have posted sales. This function will not reverse any credit card charges that have taken place.

3.13 Server Table Transfer

This manager function allows you to transfer tables from one server to another. You can transfer one table at a time or all tables. This function would typically be used when a server had to leave and another server was being assigned that server's tables or when the manager is trying to balance the table work load. This option can be password protected.

3.14 Reopen a Table/Order

In the manager screen you can reopen an order by entering the transaction number of that order. You can use the pick list (F8) to see the existing orders and pick the one you need. You cannot reopen orders after they have been posted using the manager post function. If you are reopening the order to do a receipt reprint you should use the reprint function on restaurant POS screen. When an order is reopened it can be modified but it must be closed again just like any other order. Reopening an order will void any credit card charges that have taken place but the credit card information is stored for later use. If you need to reauthorize the card in restaurant sales, simply go to **Close Table, Authorize Credit Card**, and choose to use the stored card.

3.15 Adjust Gratuity

Use this function to modify the tip on a server's ticket. There will be times (especially where credit cards are used) when it will be necessary for the manager to correct the tip that was entered for a server when the order was closed. To adjust gratuity, enter the server number and select the ticket to correct. Change the value in the credit card, cash, or check field. The new tip amount will automatically reflect the change.

3.16 Restaurant Reports



This menu option will bring you to the restaurant report screen which contains more than 40 different reports which include everything from hourly, daily, monthly and yearly sales reports to security reports to track removed items and sales. The reports contained in this menu will help you track the status of your restaurant to keep it running in excellent shape.

3.16.1 Summary Sales Report

The summary sales report shows each table and transaction grouped by server. For each transaction you will see the type of payment, the sub-total, tax and total. You will also see totals for all transactions at the bottom of the report.

3.16.2 Sales By Product Type And Hour

This report allows you to enter a start date and time and an end date and time. The report shows summary sales totals by product type (i.e. food, drink, appetizer, alcohol, etc.). The report also shows sales totals for each hour of the day. This report will help you decide how to staff your restaurant based on the productive hours of the restaurant.

3.16.3 Sales By Payment Type

If you are using integrated credit card processing, this report will break down your sales amounts by credit card type, cash, check, on account, and gift card. This reports shows sales, tax, tips, and totals for each payment type.

3.16.4 On-Account Sales Report

The on-account sales report shows a list of all on account sales that took place during the specified date range. This report shows the account name and number, transaction #, total, and date of the sale.

3.16.5 Monthly Sales Report

The monthly sales report shows sales for each day of the month. The report shows taxable sales, exempt sales, costs, profits, profit margin, sales tax, sales per table, payments received and payments outstanding. You must post your table sales to populate this report.

3.16.6 Yearly Sales Report

The yearly sales report shows sales for each month of the year. The report shows taxable sales, exempt sales, costs, profits, profit margin, sales tax, sales per table, payments received and payments outstanding. You must post your table sales to populate this report.

3.16.7 Hourly Sales Summary Report

The hourly sales summary report breaks down your sales by hours of the day. This report shows number of items and totals sales in one-hour blocks of time. This report is helpful in determining how to staff your restaurant.

3.16.8 Loyalty Credit Report

If you are using the loyalty credit functionality in the software you may use this report to see a list of customers that have accrued loyalty credits. This report shows the total they have spent and how many credits they have earned, have spent, and have remaining.

3.16.9 Active Gift Card Report

The active gift card report shows a list of gift cards that were purchased during the specified date range and currently have a balance. This report shows the transaction number of the gift card purchase, gift card number, date of purchase, starting balance on the card, total used, and amount remaining.

3.16.10 Redeemed Gift Card Report

The redeemed gift card report shows when a gift card was used for a purchase. This report shows the transaction # of the purchase, gift card number, date of purchase, starting balance on the card, date used, total used, and amount remaining.

3.16.11 Pickup Equipment Request Report

The pickup equipment request report shows equipment requests that have been generated from the **Pickup Equipment Request** function located under the **Misc.** button in restaurant sales. This report is useful to report equipment that must be picked up with catering orders.

3.16.12 Server Tips Report

The server tips report allows you to see each servers' total tips for a certain date range along with their total sales, credit card tips, on account tips, cash tips, and the tips they claimed at clock out.

3.16.13 Pre-Post Sales Report

The table sales pre-posting report should be printed each day and kept for your records in case you have a printer problem when you print the actual posting report. The posting report shows each table transaction with subtotal, tax and total and it shows time in and time out. This report is printed by server so you can see what each server did. At the bottom of the report are report totals for number of tables, average ticket, sales per guest, tickets per server, guests per server, guests per table and average table time.

3.16.14 Re-Print Posting Report

If you are unable to print the posting report at the time that you post table sales in end of day processing, you may use this function to reprint your posting report. The table sales posting report should be printed each day and kept for your records. The posting report shows each table transaction with subtotal, tax and total and it shows time in and time out. This report is printed by server so you can see what each server did. At the bottom of the report are report totals for number of tables, average ticket, sales per guest, tickets per server, guests per server, guests per table and average table time. At the end of this report you will find the postings to the G/L for sales account, bank account, tax account, COG account, inventory account and A/R account.

3.16.15 Security Event Reports

3.16.15.1 Remove Closed Table Report

The remove closed table report shows each item that was removed along with price, date and time. These items were removed after the table was closed.

3.16.15.2 Remove Open Items Report

The remove open items report shows each item that was removed along with price, date and time. These items were removed when the table was open.

3.16.15.3 Complimentary Items Report

The complimentary items report shows all items that were complimented during the selected date range. The report shows transaction #, table, item, price, date and time.

3.16.15.4 Discounted Items Report

The discounted items report shows all tables that were discounted during the selected date range. The report shows transaction #, table, discount %, discount, total, date and time.

3.16.15.5 Menu Item Event Report

The menu item event report records the sale of any products that are marked as menu item events. The report is grouped by server and shows transaction #, table, item, price, date and time.

3.16.15.6 Server Table Transfer Report

The server table transfer report records the transfer of tables from one server to another. This report shows the transaction #, table, old server, new server, and the date and time the table was transferred.

3.16.16 Food Cost Report

The food cost report shows items by product type (i.e. appetizer, food, drink etc.). For each item you see the number sold, the total sales for that item, the percent of total sales for all items, the costs and percent of costs, the sides served with the item, and the percent of costs incurred by the sides for that item.

3.16.17 Food Waste Report

The food waste report shows all items that have been entered into the food waste system. The report is printed by date range and each type of waste is printed on a separate sheet (i.e. spillage, cooking error, etc.)

3.16.18 Sales Margin Report

The sales margin report shows sales margins for items you have sold during the date range you select.

3.16.19 Profit Ranking Report

The profit ranking report shows items for a date range ranked by the profit generated by the item. The highest profit items are at the top. The report shows item, quantity sold, sales totals, cost totals, profit, and profit percent.

3.16.20 Menu Items Report

The menu items report allows you to print out the structure and pricing of your menu. This report shows the menu items on each tab and what modifier lists are enabled on each item. At the end of the report you will find each side list and the items that are included on each list. This report also shows pricing for each item.

3.16.21 Daily Sales And Labor Report

The daily sales and labor report shows each hour of the day and the totals for that hour. You, as a manager, can look at each hour and decide if you have too many or too few workers based on total sales and labor for the hour. You will also see a breakdown of sales by product type if you are using the default types (i.e. appetizers, drinks, food, alcohol, desserts, beer, wine, etc.). At the bottom of this report is a summary of all hours for the day.

3.16.22 Server Efficiency Report

The server efficiency report is used to report the average table time as well as average sales amount for each server during a specific period of time. This can be useful in evaluating employee performance.

3.16.23 Product Activity Report

This report shows each month of the current year and the total quantities sold for each item for each month. Monthly totals for all items sold during a month are at the bottom of the report.

3.16.24 Product Aging Report

The product aging report shows all inventory that has been in inventory longer than XX days. You decide how many days. For those products that have been in inventory for more than XX days the report shows you how close those products are to the shelf life you have assigned to them. A negative life on the report indicates that the product is past its shelf life. The report also shows the date the item was stored in inventory. The software removes inventory based on first in first out. For this report to be meaningful, you, as a manager, will need to make sure you remove product from the shelf first in first out. You will need a system to do this (i.e. put on the left remove from the right as you stock and remove shelf inventory).

3.16.25 Average Stock Usage Report

The average stock usage report shows average usage per day (calculated over the last 21 days). The report shows the quantity that will be used for XXX days (which you enter). The report shows how short you are in quantity for XXX days. The report also shows current on hand and days of stock that you currently have in inventory.

3.16.26 Restaurant Usage Report

This report allows you to enter a start date and time and an end date and time. Using these dates and times you can print a report of the inventory consumed. The report displays the SKU, the item description, the unit of measure, the quantity used, and the source. The source indicates whether the item consumed came from a recipe or was simply a finished goods item.

3.16.27 Weekly Product Usage Report

This report allows you to enter a start date and time. The software will create a product usage report beginning at that date and time and going for seven days. The report can be filtered by department and product type and will include finished goods and raw materials from your recipes.

3.16.28 Product Usage By Weight

The product usage by weight report displays the recorded weight used of certain products using the **Record Product Usage by Weight** function under the **Misc** button in restaurant sales.

3.16.29 Active Cash Drawer Report

The active cash drawer report shows each sale that was closed for a given cash drawer number before the drawer is closed and cleared. Sales are grouped by drawer number and then by server.

3.16.30 Cash Drawer Close Report

The cash drawer close report shows how and when each cash drawer was closed for a certain period of time. You may also use this report as a reprint of the drawer closing report if it was not printed at the time the drawer was closed.

3.16.31 Summary Sales By Cash Drawer Report

The summary sales by cash drawer report shows each table and transaction grouped by cash drawer number. For each transaction you will see the type of payment, the sub-total, tax and total. You will also see totals for all transactions at the bottom of the report.

3.16.32 Item Sales By Cash Drawer

The item sales by cash drawer report shows each product that was sold grouped by cash drawer number. The report includes the product name, quantity, sales total, and cost.

3.16.33 Cash Drawer Payout Report

The cash drawer payout report shows any petty cash payout that was made using the **Petty Cash Payout** function under the **Misc** button in restaurant sales. This report shows the employee that made the payout, what was purchased, the drawer number, total, and date and time the payout was recorded.

3.17 Assign Employee Card Numbers

This function will allow you to make your restaurant more secure by assigning a reusable magnetic card to each employee. Cards may be used to clock in as well as to server in. These cards are available from our sales department in an assortment of colors. Employee cards help you keep track of your employees as well as prevent anyone from using the system that is not assigned a card.

3.18 Record Food Waste

It is impossible to run a restaurant without a little bit of food waste. With this menu option, BPA Restaurant Pro allows you to track each occurrence of waste and give a reason (samples, spillage, cooking/order errors, etc.), quantity, shift (when it happened) and so on. To record food waste, enter the product ID / sku for the wasted item. Enter the quantity of waste. Select the waste type and key in the shift. The waste type and shift data remain on the screen as you enter each item that was wasted so that you only have to enter these fields once for each waste type. When you have finished entering each item for each type of waste you press **Post Waste** to record your waste and remove the wasted inventory. After posting waste you can run a waste report for any date range.

3.19 Product Manufacturing

Our Product Manufacturing module gives you the power to setup and maintain those inventory items that you make out of other components in inventory. Using this powerful tool you can create a kit that specifies which raw components are used to make the end product and then create a batch of that kit to maintain an accurate inventory. This module is especially useful for pre-made items that need to reflect in inventory as the end item and not the raw components. Our recipe module serves a similar purpose, however the recipe items are pulled from your inventory as they are sold. The manufacturing kits pull your inventory when you run the batch, regardless of the date they are purchased.

3.20 Customer Loyalty

Within the BPA Restaurant Pro system we provide several different options for you to reward your most loyal customers. We currently have three basic types of customer loyalty systems: A percentage discount based on the dollar amount spent, a redeemable credit based on the total amount spent, and a punch card type program where you can define a specific item to generate a reward after a certain quantity of specified items are sold to a specific customer. These loyalty systems are customizable in order to fit your needs. Customer loyalty cards are available from our sales department.

3.21 Schedule Employees

Use this module to create a daily schedule for your employees. This not only allows you to keep track of your employees work times and gives them a clear schedule to go from but you can also use the schedule and certain options in the miscellaneous definitions menu to prevent your employees from clocking in when they are not scheduled to work.

3.22 Manual Entry Of Daily Sales

This function is most often used by restaurants who are writing hand tickets for customer orders. In other words, they do not use the computer to select items, sides, print receipts etc. If you are that type of restaurant, you will use this function to record all your sales. This is necessary for you to track food costs, sales, and inventory.

To use this function you will need to collect the sales data you will be entering into the system. You will need the quantity sold for each item and the total paid for the items you are entering. If you want to track guest counts and sales per guest you will need to know how many guests you served. The data you are collecting is usually for one day. However, it can be for any time period you desire including multiple times in a day. To collect your data print a **Product Sales Work Sheet**. Use this as a worksheet to collect your data. Then to enter your data select the **Manual Entry of Daily Sales** button on the manager menu. You will then enter the date for the sales, the guest count (optional) and the sales tax collected for the sales you are entering.

At this point you will be presented with a screen of your defined product items similar to your worksheet. Transfer your sales data to the screen entering the quantity sold for each item. When you enter the quantity sold the system will calculate the total paid for each item using the

defined default price. If the total paid is correct simply go to the next item and enter it's quantity. If the total paid is not right change it to the correct total.

When you have entered all your data press F3 to continue. Next the system will ask you if you are ready to post your sales. When you post these sales the data you have entered will be posted to your general ledger (sales, cost of goods, sales tax, bank account, and inventory) and physical inventory will be adjusted for the sales. The data will also be posted to your sales data files so that sales reports (daily, monthly, yearly, etc.) can be printed.

For restaurants who are writing hand tickets for customer orders, it is important to use this function to record sales and process inventory. This is the only way that the system can get the data it needs to compare what you have sold with what you have purchased to help you control your recipes, waste and shrinkage. In other words, what you sell and what you purchase should match but they will not, especially in a restaurant. You will need help in determining how accurate your recipes are and how much food is being lost. You will also need to complete your periodic monthly inventories to help the system give you this information.

Note: This manual entry of sales function can also be used by restaurants running the computerized POS system for ease of entry for catering and banquets, where large quantities of items need to be entered. For example, it may be easier to enter 1000 chicken dinners here than in the POS screen where you would need to press the screen 1000 times.

3.23 Restaurant Inventory

The Restaurant Inventory system is a fully functional inventory tracking system that will allow you to perform all the necessary tasks to setup, track and maintain your complete inventory.

3.23.1 Print Inventory Cycle Count Report

Use this function to print a report for counting inventory. This count is a periodic cycle count and will be used to adjust inventory. The report has a column for quantity counted and a column for the difference between what the software thinks is in inventory and what you counted. This column represents the adjustment to inventory that will need to be made to make inventory accurate.

3.23.2 Enter Cycle Count Adjustments

Use this function to enter the adjustments to inventory that you entered on your cycle count report. After you have entered these adjustments you will need to post them to actually apply them to physical inventory and to the general ledger inventory account.

3.23.3 Print Inventory Discrepancy Report

Use this function to print a report showing the inventory discrepancies that you have entered into the system from your inventory cycle count report. After you have reviewed these adjustments you will need to post them to actually apply them to physical inventory and to the general ledger inventory account.

3.23.4 *Post Inventory Cycle Count Changes*

Use this function to post the changes you have entered to physical inventory and to the general ledger inventory and cost of goods accounts. If you have lost inventory your G/L inventory account will be reduced and your cost of goods account will be increased.

3.23.5 *Print Perpetual Vs Periodic Inventory Discrepancies Report*

Use this function to compare your periodic counts to your perpetual inventory. This report will help you identify inventory problems you have in your restaurant. The report shows the 1st count and the 2nd count and what was purchased between the two counts. It also shows what was sold and wasted between the two counts. It shows what the computer says should have been on hand and it shows the difference/variance. The difference represents the difference between what the computer thought was on hand and what the physical count shows was on hand.

3.23.6 *Manual Inventory Adjustment*

You can adjust inventory using the **Add**, **Modify** or **Delete** functions contained within this module. However, it is better to use the cycle count function to adjust inventory and the vendor order and receiving functions to put product into inventory. The cycle count function will count and adjust inventory including the general ledger sales and cost of goods accounts. The manual inventory adjust function does not adjust the general ledger. These adjustments must be made as journal entries in the accounting general ledger module. The manual inventory adjustment function is not typically used for restaurant inventory but is more commonly used for products sold in your gift shop or similar environment. The cycle count functions are typically used for restaurant inventory.

3.23.7 *View Manual Changes To Inventory*

This function allows you to view dates, times, and modifications made to inventory using the manual inventory adjustment function. This will help you identify inventory changes that you may not be aware of that were made by your employees.

3.23.8 *Print Daily Inventory Snap Shot Report*

This function allows you to print a snap shot report of your inventory for any day. For example, if you are looking at your on hand inventory levels and you see some on hand quantities that do not seem right, you can print an inventory snap shot report for each day of the last week or month and see when the on hand levels changed. This will help you find the point of time that your inventory changed. To print this report and have it be meaningful you must be taking inventory snap shots each day. This will happen automatically if you have enabled inventory snap shots. To enable inventory snap shots go to the **Restaurant System > Manager Functions > Misc Definintions**. Go to **Business System** on the left and find the function labeled **Enable Inventory Snap Shots**. From this point on the system will automatically take one inventory snap shot each day.

3.24 **Employee Charges**

Employee charges may be used to track employee meals or product that an employee is purchasing. A report can be run to show the employee charges so they may be deducted from the employee's

paycheck. To enable employee charges go to **Restaurant System > Manager Functions > Misc Definitions** and click on the **Manager** tab on the left side. There are two options you will need to select. Check the boxes labeled **Enable on account restaurant sales** and **Enable employee charges**.

3.24.1 *Employee Charge Report*

Here you may print all outstanding charges or charges during a certain date range which may coincide with your payroll. You can also choose to run the report for all employees or just a specific employee. This report can be provided to your payroll company or accountant for payroll deduction(s).

3.24.2 *Mark Charges as Paid*

Here you will see all the outstanding employee charges. You can select individual orders by simply placing a “Y” in the Pay Now column or you may use the **Select All** option to mark all invoices as paid. In addition you can filter the orders by employee number or date range. To mark all invoices for a pay period as paid, enter the start date and end date of the pay period and click **Apply** and then **Select All**. Once you have selected the orders to mark as paid, click **Mark Selected Charges as Paid**. You will then be asked if you would like to print a report showing the orders that were marked as paid.

3.25 **Alternate Language**

The Alternate Language function allows you to choose out of 11 different languages which will then be used as the alternate language for your menu names and menu items.

3.26 **RapidServer Licenses**

This option allows you to manage and assign licenses to RapidServer mobile devices. Here you will see any available licenses as well as the device to which they are assigned. You may enter new licenses received from Business Software Solutions by clicking **Enter License**. If you would like to assign a license to a new device, click **Request License** under the **Options** screen on the RapidServer device you would like to assign a license to. In **RapidServer Licenses** you will see any outstanding requests listed next to **Requested Licenses**. To assign the license, select from the list of licenses below and click **Assign License**. Choose the new device from the list and click **Ok**.

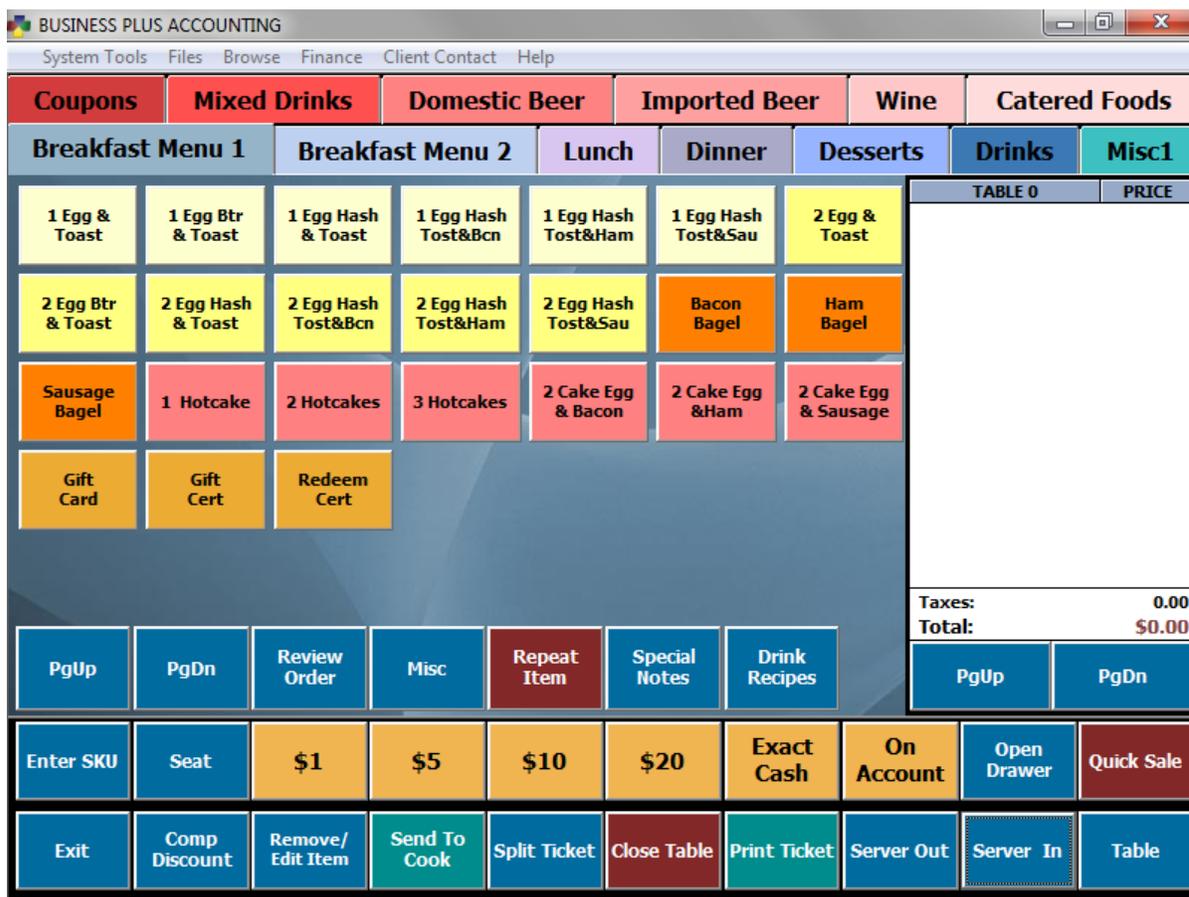
3.27 **Online Ordering**

This option is used to integrate the Eat On the Web online ordering service from Business Software Solutions. Please contact us at (801)336-3303 for more information on this service.

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4 Restaurant Sales

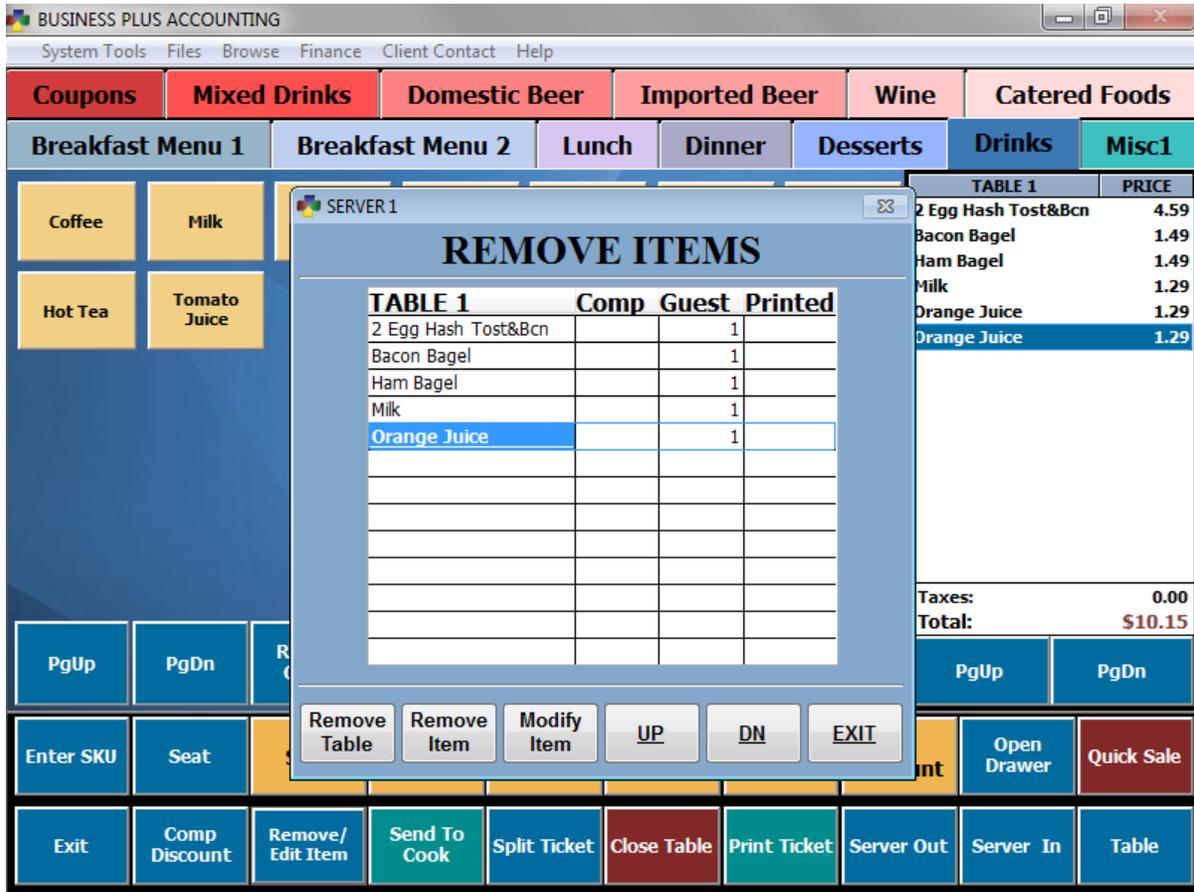


4.1 Entering Restaurant Sales

To enter restaurant sales the server must first clock in. After clocking in the server can press the **Restaurant Sales** button to enter the restaurant sales menu. The server will then press the server button and key in his/her server (employee) number. Then a table menu will pop up. The table menu shows all the tables the server is currently working and has a **New Table** button at the bottom. The server will select the table he/she is working or the server will press the **New Table** button and enter the number for the new table. Once a table is selected the server can select any of the menus and select items from those menus. If the item selected requires a soup, salad, potato, vegetable or requires cooking instructions the appropriate defined selection screen will pop up and the server will select what the customer has ordered. If the server makes a mistake on the sides selected for an item, the server may select remove/edit item and either modify the item and choose the correct sides or simply remove the item. The server can print customer receipts or cook tickets at any time. The cook tickets contain all the items selected for a table and any sides or cooking instructions that go with the items. The server can comp items or the entire order. If the manager password is active the server will need a password to comp or remove an item unless the password requirement has been turned off in miscellaneous definitions. When the server has finished with a table the server can close the table by accepting cash, credit card, or check. Credit

definition system, you must enter that password to execute this function unless the password requirement has been turned off in miscellaneous definitions.

Modify Item may be used when changes need to be made to the sides associated with the item that was ordered.

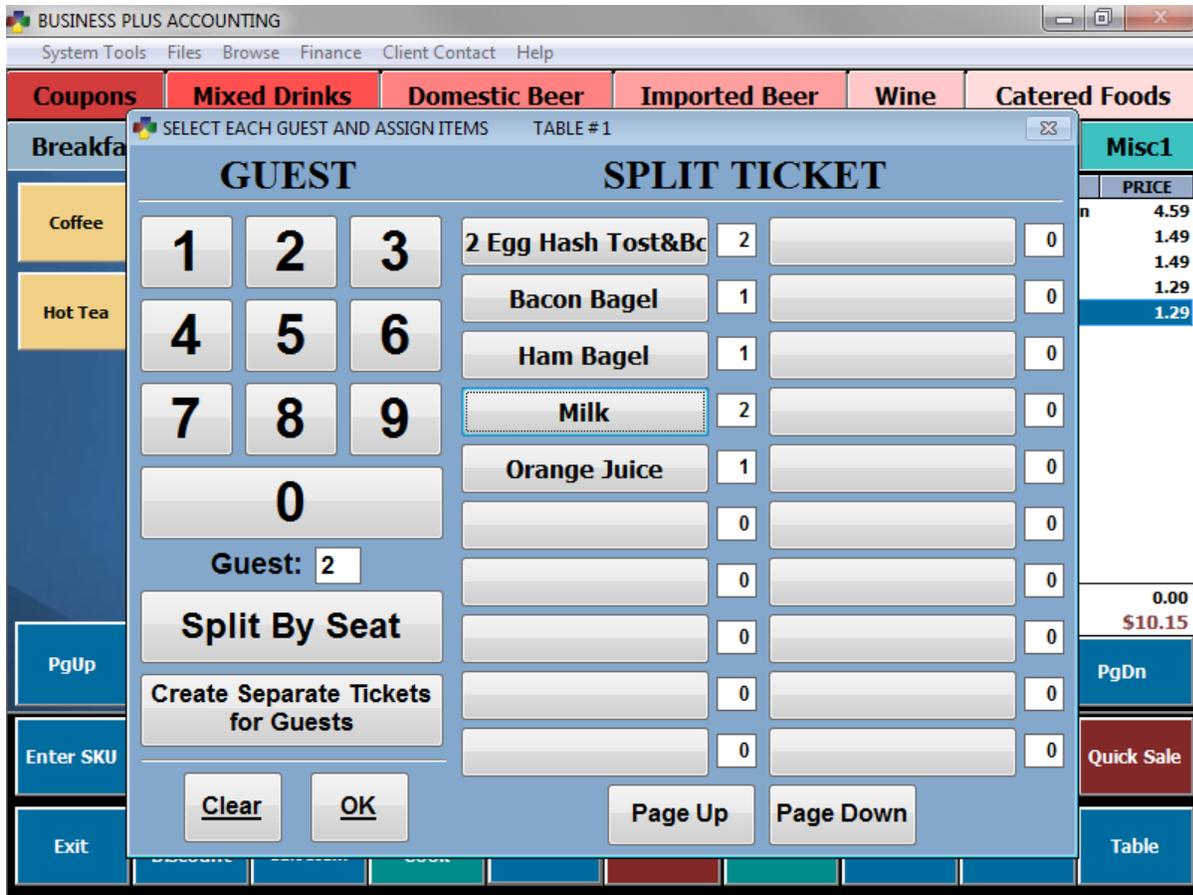


4.4 Send To Cook Button

Use this function to print out the ticket for the cook for the current table order. The ticket will have each item that has been ordered for the table. If an entree has sides assigned to it they will print indented below the item. If the entree requires cooking instructions they will also be printed below the item. The cook's ticket can be printed as often as necessary.

4.5 Split Ticket Button

Use this function to split the ticket for the current table between multiple guests. When the screen comes up all items default to guest # 1. At this point you should press the 2 key. This sets the guest to #2. Now press the item buttons that will be paid by guest #2. If there is a 3rd guest, press the clear button and then press the 3 button. Next press all the items that will be paid by guest #3. The guest number will show up next to the item as you assign the items. Use **Page Up** and **Page Down** buttons to display items that are not visible. Click the **Ok** button when you are done.



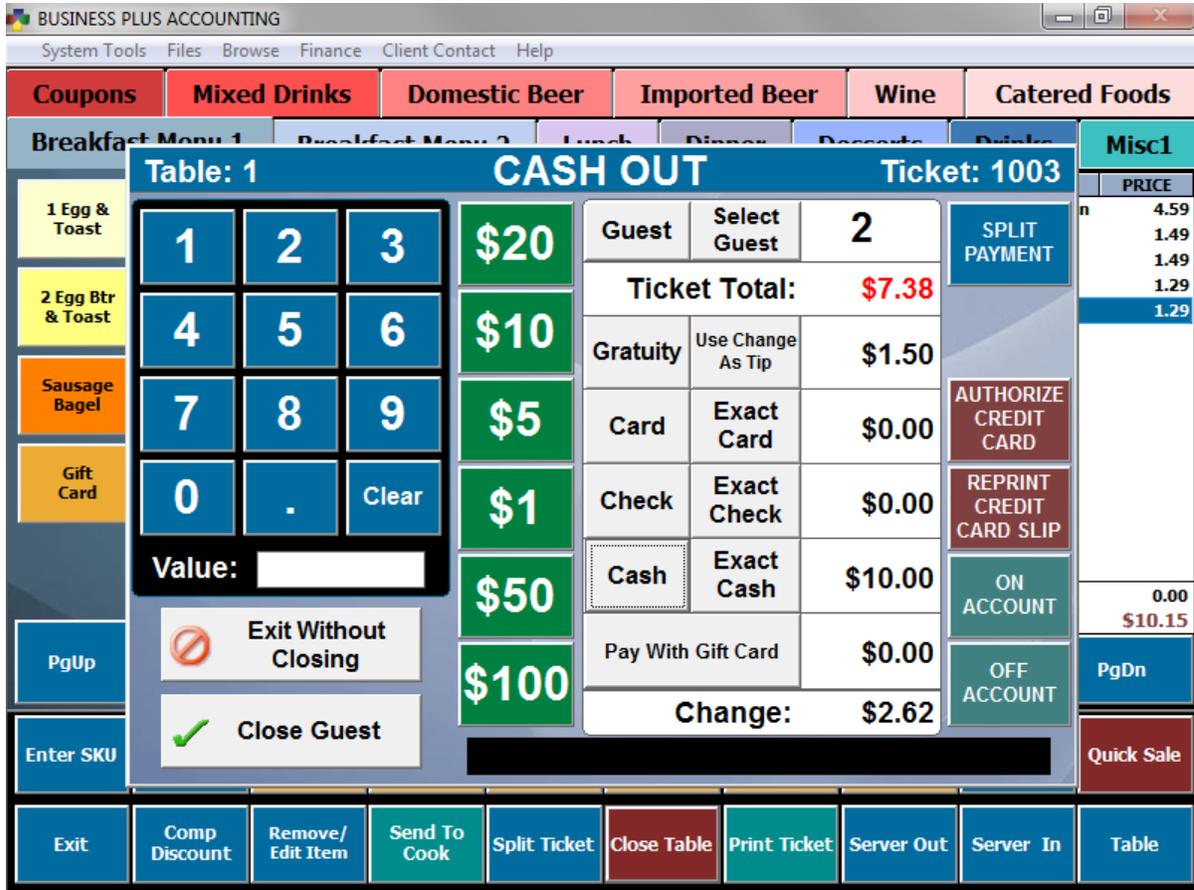
4.6 Close Table Button

Use the **Close Table** button to receive payment and close out a table. If the table is a split table with multiple tickets each ticket will be closed one at a time. When you enter the close table screen the total for guest #1 will be displayed as the total due. To add tips to the total due, use the key pad or the dollar buttons to key in the tip amount and press the **Gratuity** button. This will give you a new total that includes the tip. You may also press the **Load Change** button to set the change for the current amount tendered as the tip.

If the customer has given you the exact amount due you will press the exact button (**Exact Card**, **Exact Check**, or **Exact Cash**). If the customer gives you more than the due amount you will key it into the key pad or use the dollar buttons and press the **Credit Card**, **Check** or **Cash** button. The software will calculate the change for you and display it on the screen. Then you will press the **Close Guest** button. You have now finished cashing out guest #1. If there is a guest #2 (split ticket) the total for guest #2 will be displayed and you will need to process that guest the same way you process guest #1. When you are finished processing all guests the software will print a final receipt for each guest and the entire table will be closed.

If multiple customers wish to split payment of a ticket evenly, press the **Split Payment** button and specify the number of guests to split the payment between. This will create multiple guest entries and allow you close out each guest the same as when you split the ticket.

If you have enabled on account sales in the miscellaneous definitions, you will be able to put a ticket on an account by pressing the **On Account** button and then entering their account number. Press the **Off Account** button to remove the account associated with the ticket and require the ticket to be paid.



If you have enabled integrated credit card processing, use the following procedure to process credit cards and capture tips.

1. Press **Authorize Credit Card** and then swipe the card. The card will be pre-authorized for the total.
2. The software will print the credit card authorization slip.
3. Exit the screen if necessary by pressing **Exit Without Closing**.
4. Have the customer add gratuity to the credit card authorization slip and sign it.

5. Bring the close table form up again. Enter the gratuity amount the customer has indicated on the credit card authorization slip using the numeric keypad.
6. Press the **Gratuity** button to load this total as the gratuity amount. The card amount will automatically adjust to include the gratuity amount.
7. Press **Close Guest** to finalize the transaction.

4.7 On Account Restaurant Sales

There may be times when you want to allow a good customer to purchase food items on account or you may want to charge items to the customer's room. To sell items on account you need to define the customer in the customer definition screen. When you define the customer give them a numeric account number so that the account can be entered in the restaurant software using the numeric key pad. Next enable on account processing in miscellaneous definitions. When on account processing is enabled you will see two extra buttons on the cash out screen. One button says **On Account** the other says **Off Account**. When you press the **On Account** button you will be asked for an account number. You will use the numeric key pad and enter the customer's account number or room number. When you press **Close Guest** the software will create an on account order for the customer. This order will appear on statements that you can print for the customer and can be paid by going to the business system and selecting the **Accounts Receivable** system and entering the customer's account number and payment. If you press the **On Account** button by accident you can press the **Off Account** button.

4.8 Print Ticket Button

Use the print ticket function to print out a receipt for the current table. If this is a split table with multiple guests a receipt will be printed for each guest. Receipts can be printed as often as needed. The receipt that is printed is for the current table.

4.9 Server Out Button

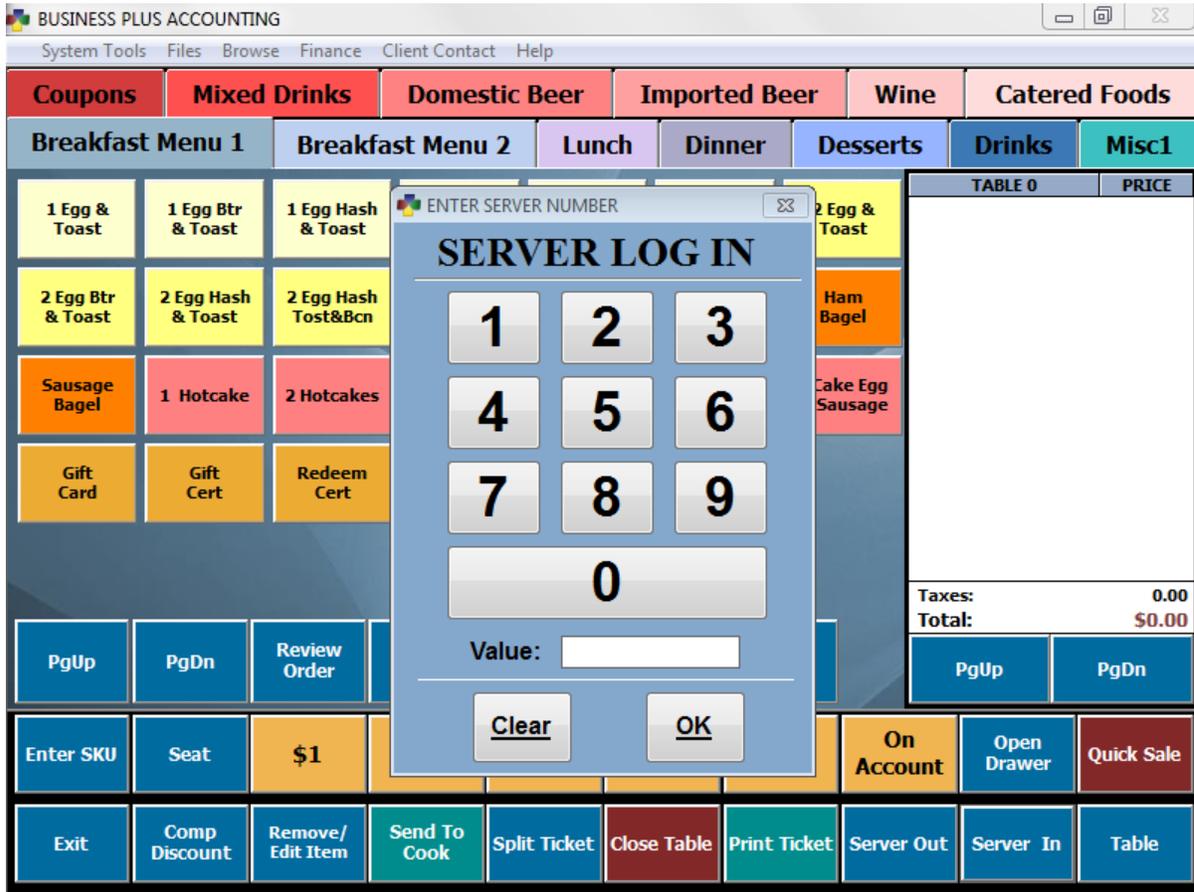
The server uses the **Server Out** function to temporarily log out of restaurant sales. Logging out prevents other servers from accidentally modifying your table items. You should always press the **Server Out** button when walking away from the terminal.

4.10 Server In Button

The server uses this function to log into restaurant sales. To log in use the key pad to enter your server #. This number is the same as your employee number. This number is assigned when an employee is added to the system through the employee definition option selected on the manager menu. In order for servers to log into and out of the restaurant menu system they must have a number.

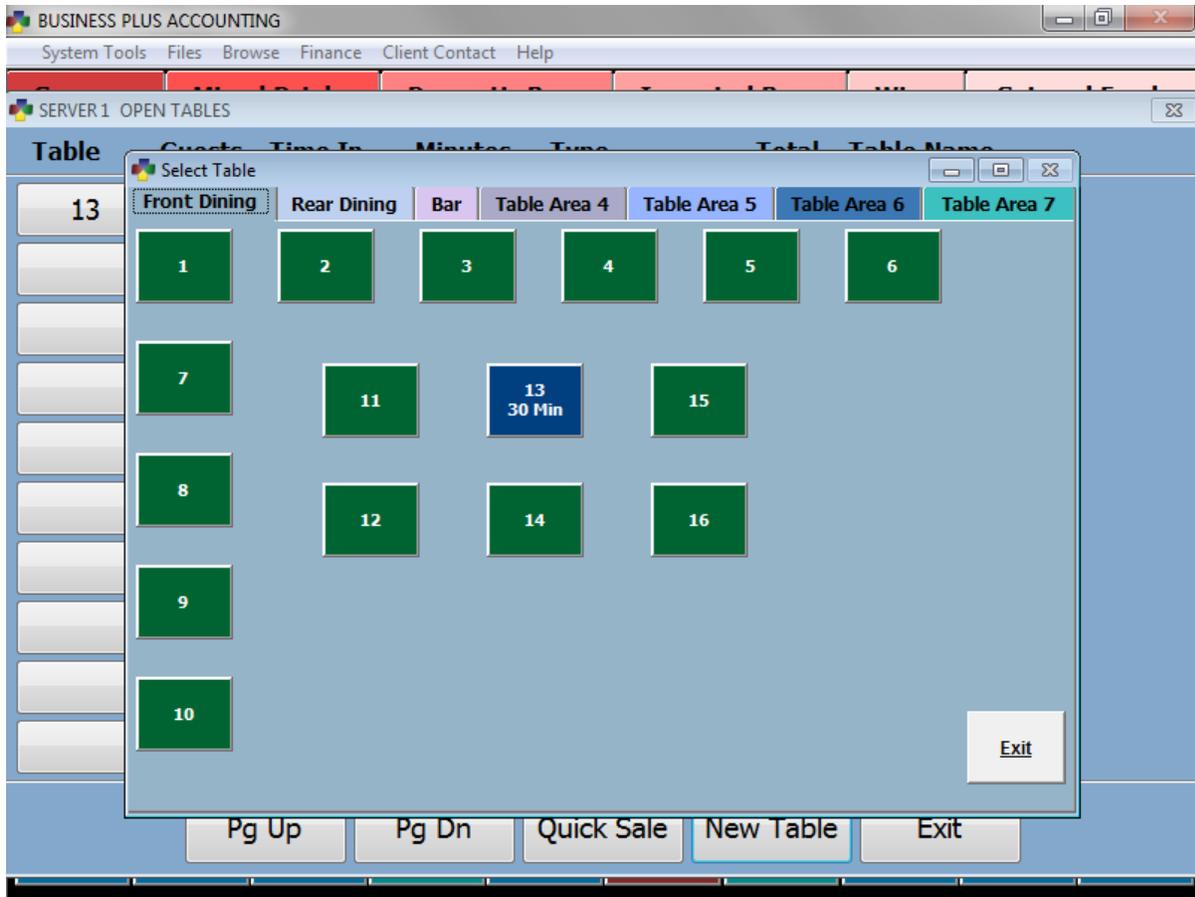
When the server has logged in, a table screen will appear showing all the open tables that are assigned to the server. The server can select one of these tables or press the **New Table** button. If the **New Table** button is pressed the server will be presented with the table layout screen. From

here they may select the table the guest is seated at. Once they have selected a table another screen will appear allowing the server to specify how many guests are at the new table.



4.11 Table Button

When the **Table** button is pressed, a table screen will appear showing all the open tables that are assigned to the server. To the right of the table number the server will see how many guests are being served at the table. Use page up and page down buttons to display tables that are not visible. The server can select one of these tables or press the **New Table** button. If the **New Table** button is pressed the table layout screen will appear allowing the server to choose which table to use for the new order. When the new table has been chosen another screen will appear allowing the server to specify how many guests are at the new table.



4.12 Enter SKU

The **Enter SKU** button allows you to add an item to an order that does not have a menu button. You may choose to use a barcode scanner with this function in order to scan retail items that have a barcode or you may use the **Pick** button to choose a product from your product list. When the items is scanned or selected it will be added to the current order.

4.13 Seat Button

The **Seat** button is used to assign items to a particular seat at the table. To use the **Seat** button correctly simply click the button, select the seat, and then put in the order that corresponds to that seat. Once you are finished with that seat simply click **Seat** again, choose the next seat number, and ring in the order for that guest. Continue this process for each seat. You may choose to have the seat number print on the cook's ticket by changing this setting under the misc. definitions menu.

4.14 Quick Cash Out Buttons On The POS Screen

The quick cash out buttons on the POS screen can be used when the customer is paying with cash. They are very fast and are typically used in a bar setting, on a drive through fast food window, or at a station where cash is most often given, as in a coffee shop. Usually the quick cash buttons are used in conjunction with the quick sale option. A typical scenario would be as follows: A customer

comes to the bar, the quick sale button is pressed, and a drink is select from the alcohol menu. The drink came to \$3.50. The customer offers a five dollar bill to pay for the drink. One of the quick cash buttons will say \$4.00, one will say \$5.00, one will say \$10.00, one will say \$20.00 and one will say \$50.00. Since the customer offered a five dollar bill you will press the \$5.00 button and the receipt will print. Under these conditions you do not need to go to the more time consuming **Close Table** screen. However, if the customer is paying by credit card, or is having the ticket split between multiple guests, or the cost of the meal is being placed on account, you will need to go to the **Close Table** screen.

4.15 Manual Cash Drawer Open

If the auto open cash drawer function is enabled the cash drawer will open when an order is closed and the receipt is printed. If you need the ability to open the cash drawer at any time by pressing the **Open Drawer** button, you must enable the cash drawer manual open function. This is accomplished by going to the **Miscellaneous Definitions** screen and selecting **Point of Sale** on the left. Check the option **Allow Manual Open Of Restaurant Cash Drawer**. To enable the auto open cash drawer function, check the option **Automatically Open Cash Drawer On Cash Out for Cash/Check Transactions** and/or **Automatically Open Cash Drawer On Cash Out for Card Transactions**.

4.16 Quick Sales

There is a **Quick Sale** button on the restaurant sales screen. When this button is pressed, table numbers are automatically assigned (500-999). After pressing the **Quick Sale** button, all the employee has to do is press the item buttons for the items being sold and then cash out the sale. This makes the process very fast. This technique is usually used at the bar. You can enable or disable the quick sale button in the misc. definitions menu.

4.17 Page Up and Page Down

These navigation buttons may be used if you have more menu buttons on one menu than the screen allows. Menu buttons will automatically be placed on the next page if there is no room. You may page down to see the additional menu items and page up to return to the top of the screen.

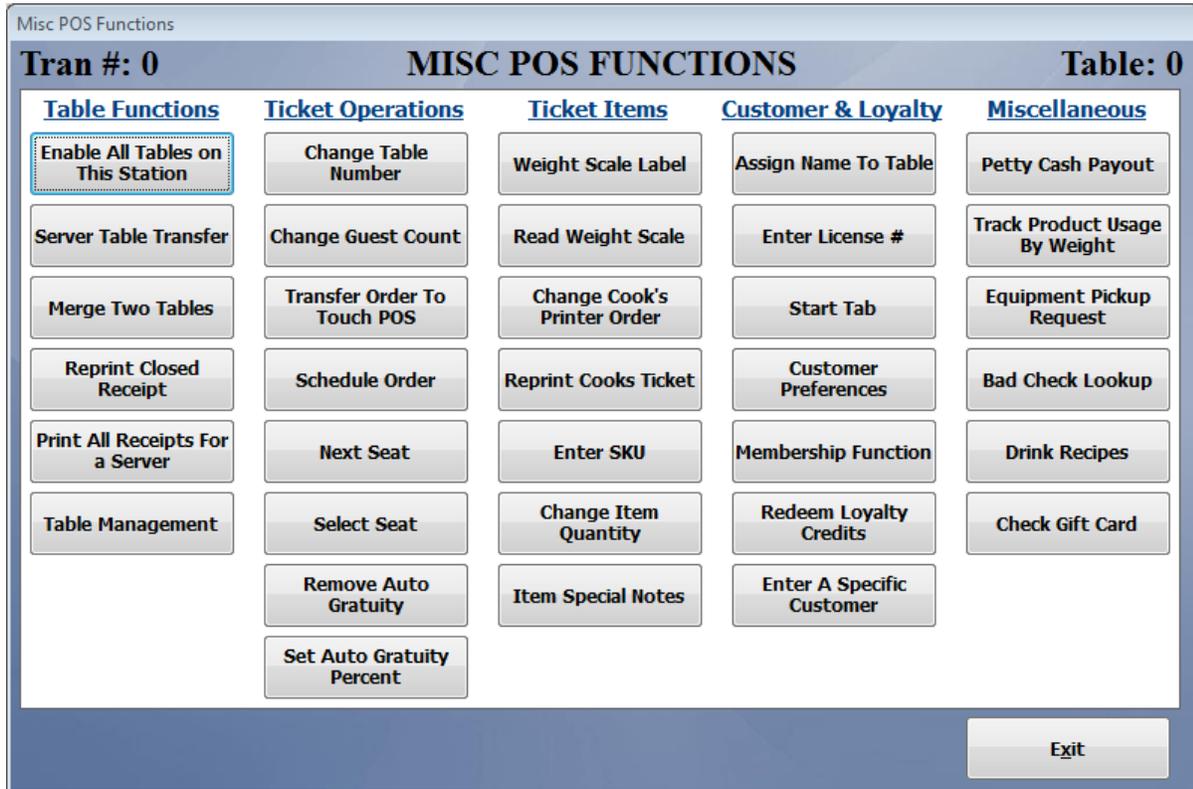
4.18 Review Order

Typically before a server sends an order to the cook's sprinter, it is important to review the items, sides, extras, seat assignments, etc. that have been entered for that order. If there are mistakes they can be fixed before the items are prepared. The **Review Order** button on the POS screen allows you to review all items, sides, prices and seats associated with the current order. Items colored yellow have been printed to the cook's printer. Items colored red have been marked as done by the cook on the cook's monitor screen.

4.19 Misc Button

The **Misc** POS menu contains many functions that may only need to be used occasionally. If you find there are some buttons that you use more than others, several of them may be swapped with

the **Enter SKU**, **Seat**, and **Drink Recipes** buttons on the main POS screen. This can be done from the misc. definitions menu under manager functions.



4.19.1 Enable All Tables

The **Enable All Tables** function is useful for a manager to be able to view and modify all of the tables in the system rather than just the orders that are assigned to one employee number. If you select **Enable All Tables** and then return to the POS screen and select the **Table** button, all of the orders in the system will be available for selection. This option will be disabled when the employee servers out or a different employee servers in. **Enable All Tables** may be permanently enabled in the misc. definitions screen under manager functions.

4.19.2 Server Table Transfer

The server table transfer function is used to transfer a table or multiple tables from one server to another. This is useful on a shift change. When you select **Server Table Transfer** you will be asked for the old or current server and the new server. Simply enter the employee number of the server or select **Pick** to see a list of all servers. You may enter a single table number to transfer or you may leave the table number set to 0 which will transfer all of the tables assigned to the old server.

4.19.3 Merge Two Tables

The **Merge Two Tables** function may be used to combine two orders on two different tables. This is useful if two parties decided to sit together. Simply select **Merge Two Tables**, enter the table

number where the guests are now seated and click **Table 1**. Enter the table number that you would like to merge with the first table number and select **Table 2**. Select **OK** and the two orders will be merged together.

4.19.4 Reprint Closed Receipt

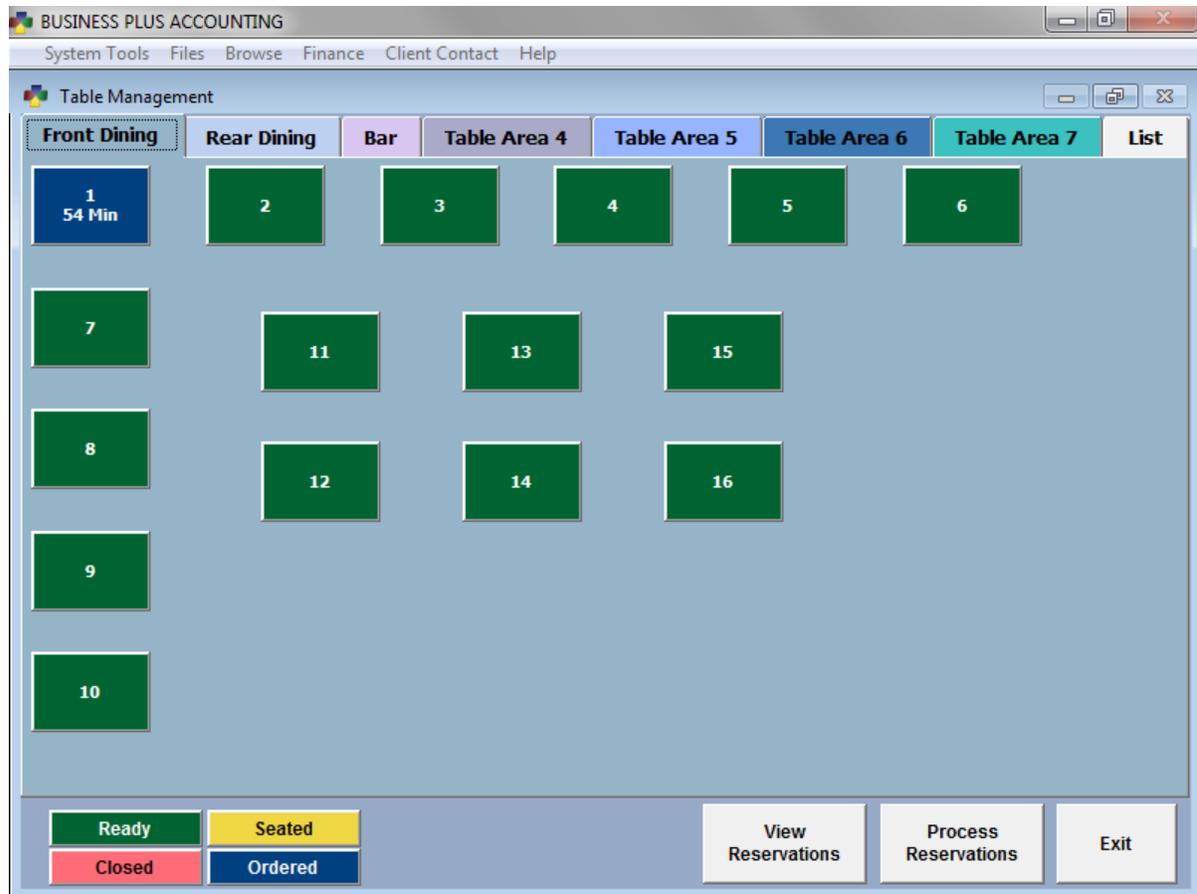
This function may be used to reprint a receipt for an order that has already been closed. Simply select the transaction from the list and select **OK** for the receipt to be reprinted.

4.19.5 Print All Receipts for Server

Selecting this option will print the tickets for all open orders for the server that is currently logged in.

4.19.6 Table Management

The table management module contains several useful functions. From the main screen you may view open tables and table times. By selecting the table you may view the order and the server assigned to the table. In the bottom right corner you may view any reservations that have been entered into the system or use the **Process Reservations** function to add new reservations or seat a reservation at a table and start the order for the server.



4.19.7 Change Table Number

Use the change table number function if an order has already been started at one table and the guest decides to move to a different table. Simply select **Change Table Number** and enter the new table number for the order.

4.19.8 Change Guest Count

Use this function to change the number of guests assigned to a table.

4.19.9 Transfer Order to Touch POS

You may use this function to transfer a restaurant order to the touch screen POS module in the business system. This is useful if a customer would like to pay for their order in a gift shop that is running the touch screen POS module. Keep in mind that once an order is transferred to touch screen POS it may not be transferred back to restaurant sales.

4.19.10 Schedule Order

The schedule order function may be used to schedule the current order for a later date or time. Once an order has been scheduled it may be displayed by selecting the **Show Web & Scheduled Orders** button on the table screen. Scheduled order will automatically be sent to the cook's printer when they become active. You may set the time period in which they become active by going to **Restaurant System > Manager Functions > Misc Definitions**. Select the **Point of Sale** option on the left and enter the number of minutes the order will become active next to the option **Activate scheduled orders 'X' minutes before scheduled time**.

4.19.11 Next Seat

This button may be used to assign seat numbers in addition to the regular **Seat** button. This button simply advances to the next seat number rather than having to select the seat number each time using the **Seat** function.

4.19.12 Select Seat

The **Select Seat** button is used to assign items to a particular seat at the table. To use the **Select Seat** button correctly simply click the button, select the seat, and then put in the order that corresponds to that seat. Once you are finished with that seat simply click **Select Seat** again, choose the next seat number, and ring in the order for that guest. Continue this process for each seat. You may choose to have the seat number print on the cook's ticket by changing this setting under the misc. definitions menu.

4.19.13 Remove Auto Gratuity

This function may be used to remove auto gratuity that has been automatically or manually added to an order.

4.19.14 Set Auto Gratuity Percent

You may use this function to manually add auto gratuity to an order. Selecting this function will prompt you for the gratuity percentage to add to the order. This function is useful if you do not

have the system set to prompt for a guest count but still would like to add auto gratuity to large parties.

4.19.15 *Weight Scale Label*

The weight scale label function is used to read barcodes that have the price embedded in the barcode. If you sell meats or cheeses that are prepackaged and sold by the pound, many times the scale will print a custom barcode label for the product. This function is designed to read these types of labels. Once your product has been defined you can simply select **Weight Scale Label** and scan the product to add it to the ticket.

4.19.16 *Read Weight Scale*

The read weight scale function is used when selling products by the pound and using a weight scale that is connect with the system. To use this function simply ring in the product that is marked to sell by weight, select **Read Weight Scale**, and place the item on the scale. Select **Okay** and the item will be added to the ticket and the price will be calculated accordingly.

4.19.17 *Cooks Printer Order*

If you are using the option to use print order on cook's ticket, you may use this function to reassign an item on an order to a particular print group. This is useful if a customer requests that their appetizer or salad be brought out with their entrée instead of prior to their entrée. To reassign the order, click the new group number on the left and then click on the items you would like to assign to that group and select done. When you send the ticket to the cook the items will show up under the assigned group.

4.19.18 *Reprint Cooks Ticket*

Use this function to reprint the entire cooks ticket for the currently selected order.

4.19.19 *Change Item Quantity*

If someone orders a large quantity of a particular product you may use this function to adjust that quantity without having to ring the product in repeatedly. Simply select **Change Item Quantity**, highlight the product for which you need to change the quantity, enter the quantity on the keypad, and select **Assign Quantity**.

4.19.20 *Assign Name to Table*

You may use this function to assign a name to a table. This name will be displayed on the table screen when the **Table** button is selected.

4.19.21 *Enter License #*

This function is used to record the drivers license number of the customer in states that require the drivers license number to be recorded for alcohol sales.

4.19.22 *Start Tab*

The Start Tab function may be used to start a bar tab by storing a customer's credit card information if you are using integrated credit card processing with the system. When the credit card is swiped the name on the credit card is also used as the table name. It is important to note that even though the card is stored it must be authorized when the order is closed.

4.19.23 Customer Preferences

Customer preference may be used to view or add notes about a particular customer. A customer account must first be associated with the order using the **Enter Specific Customer** function.

4.19.24 Membership Function

Some establishments may choose to use the member pricing option on products to give customers that have a membership special pricing. The membership function is used to apply the membership to the sale in order for the customer to get member pricing. This function is most often used with membership cards available from Business Software Solutions. To use this function simply select **Membership Function** and swipe the customer's card. If the card is a new card that has not been set up in the system a new customer account will automatically be created using the card number. Membership pricing will be applied when the card is swiped.

4.19.25 Redeem Loyalty Credit

This function is used in conjunction with one of the three loyalty programs available in BPA. When a customer comes in with a loyalty card simply start their order, select **Redeem Loyalty Credit**, and swipe their loyalty card. The system will show you how many credits or punches the customer has available to use. If the customer has not been set up in the system before a screen will prompt you to enter their customer information. When you go to close out the order the system will ask if you would like to apply any credits or punches that are available. Loyalty discounts will automatically be applied if you are using the discount loyalty program.

4.19.26 Enter a Specific Customer

The **Enter a Specific Customer** function allows you to associate a customer account with the ticket that is currently open. You may enter or pick an existing customer account or you may enter customer information to set up a new account. You may use this function to assign an account to an order for the purpose of tracking customer sales, putting the order on account, tracking customer loyalty, applying customer pricing or discounts, or applying a different customer specific tax rate. For more information on customer accounts see the Business Plus Account Business System Manual.

4.19.27 Petty Cash Payout

The petty cash payout function may be used to record payouts from the cash drawer and what the payout was used for. This is useful in an instance where you need to send an employee to the grocery store to purchase a product. Payouts will appear on the daily sales and tips report, on the cash drawer close out screen, and on the payout report in manager functions.

4.19.28 Track Product Usage By Weight

This function may be used to record the usage of alcohol by weight. Records created using this function are displayed on the product usage by weight report in manager functions.

4.19.29 *Equipment Pickup Request*

This function is used in a catering environment to track what equipment needs to be picked up from a customer's location. Once an equipment request is filled out you may print the **Pickup Equipment Request Report** under manager functions to have a record of the equipment that needs to be picked up.

4.19.30 *Bad Check Lookup*

This function may be used to track customers who have tried to use back checks in the past. Here you may record the bad check and look up bad checks that have been recorded.

4.19.31 *Check Gift Card*

This function may be used to check the current balance and usage history on a gift card. Simply select **Check Gift Card** and swipe the card to see the current balance.

4.20 Repeat Item

Repeat item may be used to duplicate an item that has already been added to the current ticket. To use this function simply highlight the item on the ticket at the right side of the screen and select **Repeat Item**. You will see the highlighted item duplicated on the ticket. This is particularly useful in a bar environment where a customer may repeatedly order several of the same drink.

4.21 Special Notes

The special notes function is used to add notes to an item that is ordered. These custom notes may be added to any menu item on the ticket simply by highlighting the item and selecting the **Special Notes** button. These notes will show up on the cook's ticket.

4.22 Drink Recipes

The drink recipes module is a separate add on module that must be purchased. This module is a useful tool for bartenders to look up drink recipes as well as store their own recipes. The module contains 697 predefined drink recipes. Please contact Business Software Solutions sales team for pricing on this module.

4.23 Purchasing Gift Cards

The software supports the purchase and redemption of gift cards. The gift cards are printed and encoded by our company in a format that is compatible to our software. Custom cards printed with your company information and logo are available. Please contact Business Software Solutions for current pricing.

To sell a gift card to a customer you must first create a menu item button for the gift card, if one does not already exist. The product for the gift card has already been created and should be in your product file. The product ID is "GIFTCARD". When a server selects the **Gift Card** button on

one of the menus, a gift card screen will pop up. While on that screen you will scan the gift card. You will then enter the amount for the gift card and press the **Gift Card Amount** button. Then press **Save** and the gift card will become a line item on the current ticket. The actual gift card data will be saved when the order is paid for. The same process is used to add to a gift card that already exists. This allows a customer to add to an existing gift card.

4.24 Redeeming Gift Cards

If the customer is paying for an order using a gift card, the server will use the **Close Table** button to cash the customer out. To pay with gift card select the **Pay By Gift Card** button on the cash out screen. On the screen that pops up you will scan the gift card. The software will show the total remaining on the gift card, the amount that will be used for this purchase, and what will remain on the card when the order is closed. Press the **OK** button and the software will assign the correct amount to pay for the order. The software will then update the history for the gift card and the amount remaining on the gift card. There is also a **Redeemed Gift Card Report**. This report shows past gift card usage for the date range selected. This report is found by going to the restaurant manager functions and selecting **Restaurant Reports**.

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5 Restaurant System Menu



5.1 Server Clock In / Clock Out

This is where the servers clock in and clock out each day. Before a server can work a table he must be clocked in. To clock in a server must enter a valid server/employee number.

Before clocking out the server should print the **Daily Sales & Tips Report**. This report will be used by the manager to verify that the money due at clock out is accurate. As an optional feature in the software you may require each server to have the manager approve him/her for clock out. The server can clock out by entering his/her server/employee number. You may also allow the servers to claim tips when he/she clocks out. This allows credit card as well as cash tip tracking for payroll purposes. To enable this option, go to **Restaurant System > Manager Functions > Misc Definitions**. Select the **Gratuity** option on the left and check the option labeled **Allow server to enter tips when he/she clocks out**.

If this option is selected, the server will be presented with the following screen when they clock out.

Approve Server Clock Out

Employee Test

Server #: **Load Value**

Auto Gratuity:

Charged Sales:

Charged Tips:*

Tip % of Charged Sales:

Other Sales:

Cash Tippable Sales:

Tip %: **Load Value**

Cash Tips: **Load Value**

Declared:

Save **Cancel**

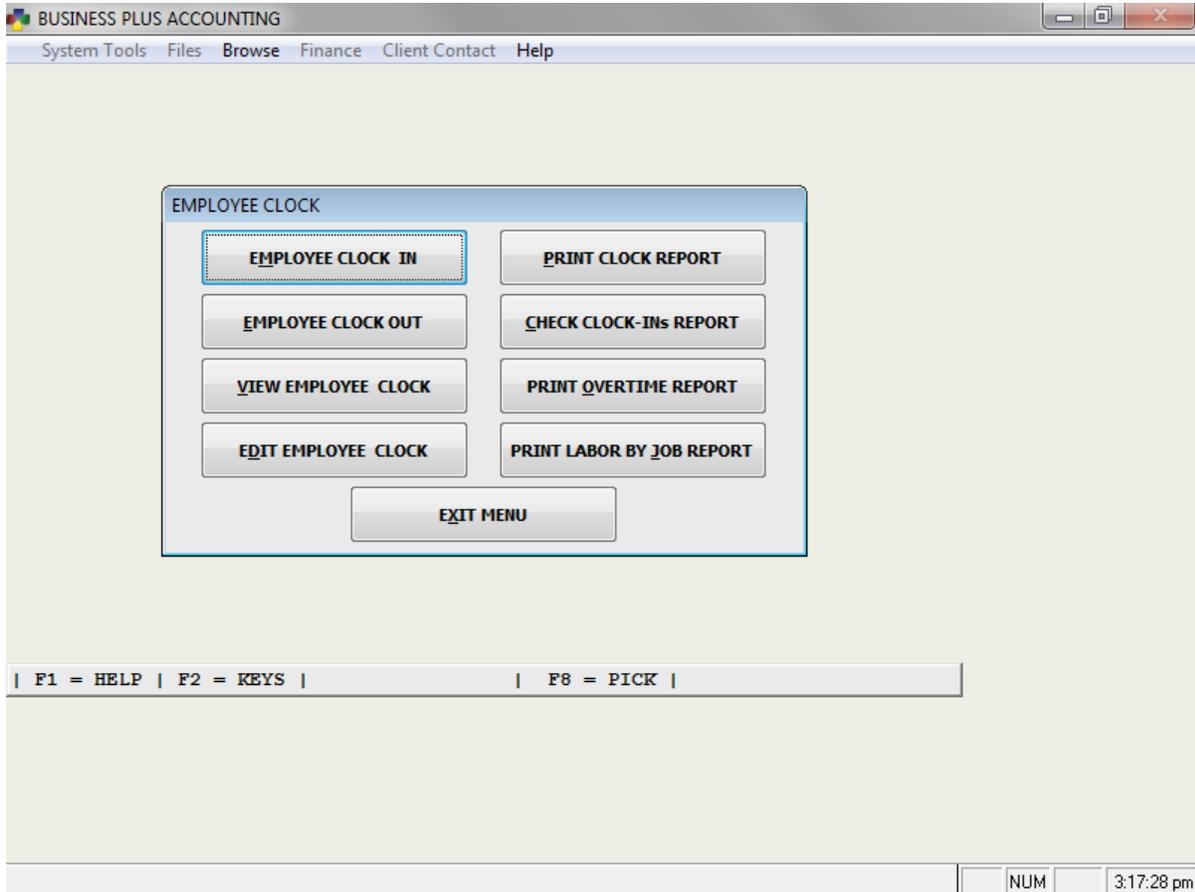
*An amount of \$1.26 will be charged to the server for credit card tip fees.

To clock out, the server may enter their employee number on the keypad and then select the **Load Value** button next to server #. They can then choose to adjust their cash tips by either adjusting the tip % or adjusting the cash tip amount. This may be done by entering the new value on the keypad and then selecting the **Load Value** button next to the appropriate option. Press **Save** when finished. An explanation of how each value on this screen is calculated is listed below.

- Auto Gratuity: This box reports any auto gratuity that was recorded on the closed sales.
- Charged Sales: This box shows any sales that were closed with a tip with a payment method of credit card, gift card, or placed on account.
- Charged Tips: This field reports any tips left on a sale that was closed with a credit card, gift card, or placed on account.

Tip % of Charged Sales:	This percentage is automatically calculated based on the charged sales and charged tip amounts.
Other Sales:	Other Sales includes sales that were closed with auto gratuity or items that are marked to be excluded from gratuity. Because auto gratuity is not treated as a tip and is considered as wages, tips do not need to be claimed on this sales amount.
Cash Tippable Sales:	This field includes cash sales as well as any charged sales on which no tip was added. If no tip was added to a charged sale the system assumes the patron left a cash tip. There is an option to exclude dine out orders from this total which will be discussed later.
Tip %:	This field allows you to claim a percentage of your cash sales as tips. You may change this percentage by entering the percentage on the keypad on the left and then selecting Load Value.
Cash Tips:	Cash Tips is the amount of cash tips that you are claiming. This amount may be calculated by entering the percentage above or you may adjust this amount by entering the tip amount on the keypad on the left and then selecting Load Value.
Declared:	The declared field contains the amount of charge and cash tips claimed.

This menu also contains a number of manager functions for managing your time clock including the ability to view/edit the clock and print clock reports for each employee. The **Check Clock-Ins Report** shows all employees that are currently clocked in. The overtime and labor reports are useful in setting employee schedules.



5.2 End Of Day Processing (EOD)

Most businesses will execute a set of functions at the end of each day or at the end of an employee's shift. In this restaurant system you will need to review each server's daily sales and tips report prior to the server leaving. You will also want to count the servers cash drawer before the server leaves. When all sales are done for the day you will want to go to **End Of Day Processing** on the restaurant menu and execute the functions found here. The only function you are required to run is **Post Table Sales**. This function permanently records your restaurant sales in the system, populates certain reports, deducts inventory, and posts sales to the general ledger. It also gives you the option to print a posting report which is similar in format to the Z reports. Z reports are also provided for your convenience.

5.2.1 Close Cash Drawer

The **Close POS Cash Drawer** function is used to settle the cash drawer at the end of the day or shift. Simply enter the cash drawer number you would like to close and hit enter. The system will

automatically pull in totals for check, credit card, and gift card payments from the sales that were closed under that cash drawer number. To reconcile the drawer, enter the beginning cash amount in the upper left box. This will be the amount that was in your drawer at the beginning of the day or shift. Next, enter the ending cash amount by entering the quantity of pennies, nickels, dimes, etc. If everything reconciles correctly your **Cash Drawer Off By** amount should be zero. Once you have finished reconciling the drawer select **OK**. You will be asked if you would like to print a cash drawer report and then if you are ready to close and clear the drawer. If you choose to clear the drawer all totals will be set back to zero. If you do not choose to close the drawer, all the current sales totals will remain in the close cash drawer screen.

5.2.2 *Post POS Sales*

Each day the manager will need to post all POS sales for the day. This function permanently records your sales in the system, populates certain reports, deducts inventory, and posts sales to the general ledger. It also gives you the option to print a posting report which is similar in format to a Z report. This report is broken down by server. Each servers totals will print on this report. The report includes such information as total sales, average sale and number of sales.

5.2.3 *View Pre-Post Cash Out Data*

View Pre-Post Cash Out Data allows you to view all the transactions that will be posted. Browsing over this data allows you to make sure there are no large accidental transactions that were closed in the software that will not be able to be removed after the posting process.

5.2.4 *Z Reports*

There are 3 different Z reports. These reports each contain sales data for different periods of time. You decide what the time periods will be. Generally the Z1 report is run each day. After running the report the software asks you if you are ready to clear the Z1 totals. If you say **Yes** the software saves the current Z1 totals for the Z2 report. The Z2 report can be run weekly or monthly or whenever it works best for you. After running the Z2 report the software asks you if you are ready to clear the Z2 totals. If you say **Yes** the software saves the current Z2 totals for the Z3 report. When you run the Z3 report the Z3 totals are cleared.

5.3 **View Table Data**

Occasionally a manager may find it useful to be able to browse through the transactional data that is stored in the software. You may use this function to browse for a past order that was closed or to see a list of all the currently open orders in the system. **View Table Data** gives you the opportunity to browse the actual database where transactional data is stored. It is broken down by open and closed orders and header(table) and item information.

5.4 **Kitchen Monitor**

The kitchen monitor button on the restaurant menu takes you to a function that allows the cooks to work off a monitor while they process the orders. The items that appear on cook's monitor #1 are the same items that will print on cook's printer #1 etc. You can have up to 5 cook's monitors. On the right side of the cook's monitor you will see the items that are being processed. On the right

side of the screen you will see all of the cooking instructions and sides that have been assigned for each item. There is an **Item Done** button (commonly called a bump button) on the screen. When you are finished with an item you can press the **Item Done** button and that item will change colors to show that it is done. The cook can also print the cook's ticket from this screen. When the cook's ticket is printed for an order, the items on that order change color indicating that they are done, just as they would had the **Item Done** button been pressed.

5.5 Daily Sales & Tips Report

The daily sales and tips report is one of the most useful summary reports in the system. This report can be run for each individual server or for the entire system by entering '000' as the employee number. This is the only report in the system that is designed to be printed on a receipt printer. It also may be printed on a full size document printer.

This report may be configured to show optional information by going to **Restaurant System > Manager Function > Misc Definitions > Manager > Restaurant Summary Report Options**. This report will give you information on total sales, tips, ticket count, table count, order type, payment types, hourly sales, and labor totals. We suggest printing this report as part of your end of day or end of shift procedures.

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6 FAQ

6.1 How Do I Change The Color Of My Menu Buttons To Group Items By Color?

There are fourteen different menus in your restaurant system. The default color for all the buttons on these menus is gray. It is sometimes helpful to color certain items on your menus with different colors. This makes it easier for your servers to select the correct items. To select the color for your buttons go to the **Manager Functions**. Select the **Define Menu Items** button. Then select **Assign Menu Item Order**. In the assign menu item order screen you can set the order that your items appear on the screen. You can also select a color for each button.

6.2 How Do I Set Up Coupons or Dollar Discounts?

Coupons may be set up in the system one of two ways. The software contains a predefined product called **COUPON**. Add a menu button to your menu using this product as you would add any other menu item. This product is automatically programmed to prompt you for the value of the coupon and then deduct it from the sale.

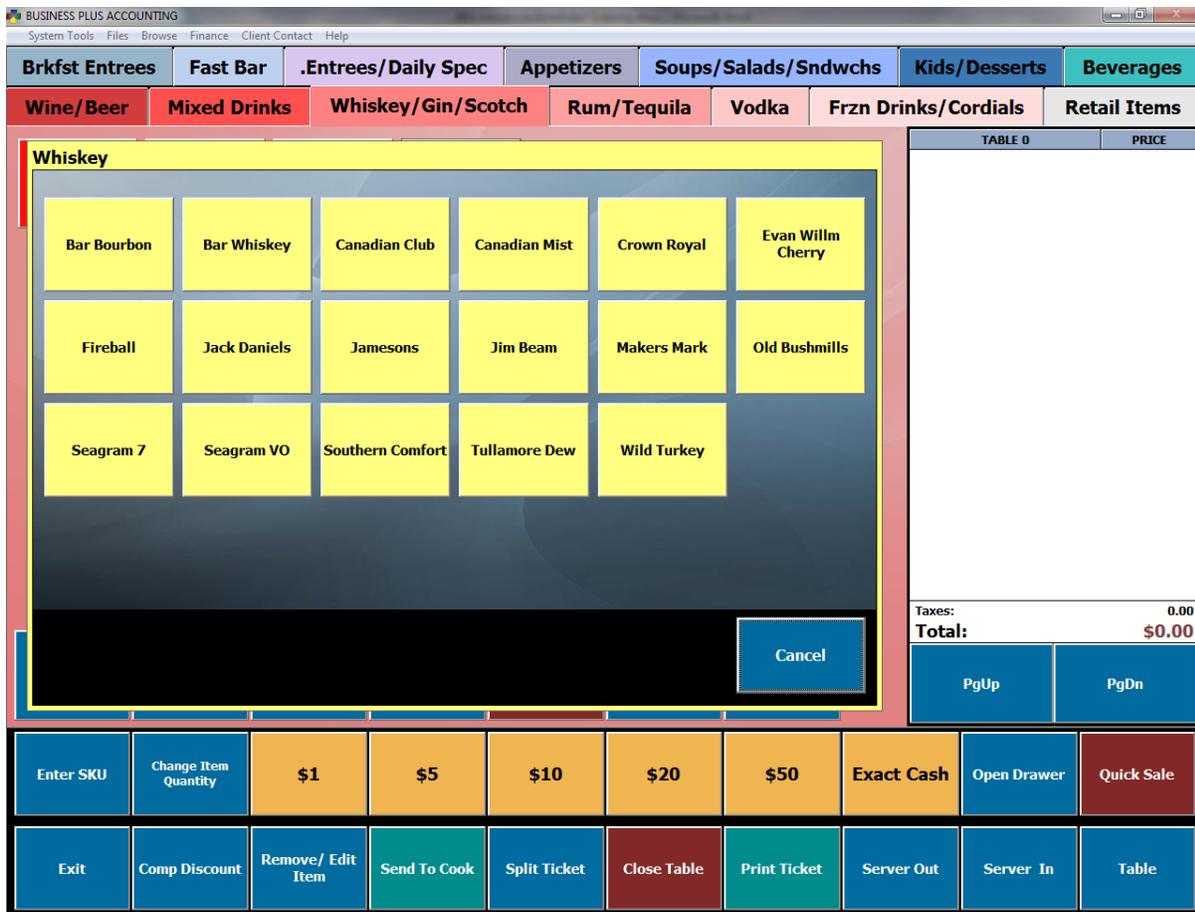
Occasionally you may want to set up a custom coupon product. To do this, add a product like you normally would. When you get to the price field, if you would like the coupon to be a predefined amount, i.e. \$5.00 off, simply enter the price as -5.000. If you would still like the system to prompt you for the value simply leave the price field blank. Next go to **Define Menu Items** and add a menu item using the product you just created. Under **Other Options** select the option that says **Allow a Custom Credit**. This will allow you to enter the value of the coupon when the menu button is selected.

6.3 How Do I Change Multiple Prices At A Time?

If you need to change multiple prices or other product information all at once simply go to **Restaurant System > Manager Functions > Define Products > Manually Set Prices and Options**. Here you will see a table view of all of the products in the system. You may change cost, prices, tax information, product type, etc., in this table view. Hit F3 on your keyboard when finished.

6.4 What Is The Best Way To Set Up My Alcohol Menu?

While there are several ways to set up an alcohol menu in the software we believe the best way to set up the menu is to have individual menu buttons for each drink and then group them together using menu item groups. To do this, define a menu item for each drink. You may then assign the drink to the appropriate menu item group. I.e., you may set up a group call "Whiskey" and assign each whiskey menu item to the whiskey group. On your restaurant menu you will see one menu group button for whiskey and see each of the whiskey drinks when you select that button. Currently you may only have 16 menu items assigned to any group in the delivery software. If you have a large alcohol menu you may consider spreading the menu out over several tabs.



6.5 How Do I Assign Employee Passwords?

To prevent unauthorized personal for entering the accounting system or the manager screens you will want to go to the **Business System** and set up a password system.

To set up passwords select the **Business System** button on the main menu. Then select the **Definitions** button. Then select the **Passwords For Modules** button. On the screen that is displayed you should select the **Activate Module Passwords** button. The modules you want password protected must be enabled in the activate module passwords screen. Check each module you want protected. To password protect manager functions in the restaurant system be sure to check **Restaurant Manager Password**. Checking this option will also require a password to enter the **Business System**.

Next you will want to go back to **Passwords For Modules** and then **Manager Password Groups**. The software allows up to three levels of manager access for the restaurant system. An unlimited number of employees may be assigned to each group. By default **Manager Group 1** has access to all the functions in the restaurant system. If you had certain managers that you wanted to have limited access in the restaurant system you may customize manager groups 2 and 3. For instance, you don't want your manager to access all the functions in the restaurant system but you would like

them to be able to approve the removal or discounting of items. Simply enter “Y” in the box for **Modify Sales Items** under manager group 2.

Next, go back into **Passwords For Modules** and select the **Assign Modules To Users** button. Key in the employee id number and enter a “Y” next to each module that you want the employee to be able to enter. Be sure to assign one of the three manager groups. If the module is enabled for passwords, the user will be required to enter his/her password to get into the module.

Whenever, a user enters his/her password to enter a module the date and time the module was entered and the employee number are logged. This information can be viewed and will show each log in for each module. To view the login information select the **View Employee Logins** button from the **Passwords for Modules** menu.

Last, Employees create their own passwords by selecting **Assign Passwords** on the **System Tools** drop down menu. To get to the system tools drop down menu select the **Business System** button on the main menu. Then select the **System Tools** option at the top of the screen. Then select the **Assign Passwords** option. Enter your employee number and then enter your password.

6.6 What Is The Difference Between An Employee Password And Employee Number?

The employee number is the number that is assigned to the employee for clocking in and out and entering the restaurant sales screen. An employee password is used for entering password protected areas of the software or approving certain restaurant sales functions. Typically a server will not need their own password. Managers may be assigned passwords and different levels of access.

6.7 What Do I Need To Do To Process Credit Cards?

BPA supports three credit card processing platforms: Paypros, X-charge, and PaywarePC. Paypros and X-charge are also processing merchants. In order to use their integration you must use their merchant service. Because they are directly integrated with BPA, PCI compliance is greatly simplified. There is no credit card information stored at your location with either of these options which greatly increases credit card security. There is no additional software cost for their integration and both companies offer competitive processing rates.

The third option is PaywarePC. PaywarePC is a software package from Verifone that may be used with most other merchant processors. The BPA software does require an additional integration module to integrate with the PaywarePC software. Please contact our sales department for more information. Because PaywarePC is a software package that is hosted at your location, all credit card information resides on your computer. While PaywarePC is convenient in the fact that it may be used with multiple merchant providers, it does introduce higher vulnerability and makes PCI compliance more difficult.

For contact information or pricing for Payware PC please contact our customer service department.

6.8 How Do I Assign Sales Tax Rates For Different Local Taxes?

Different communities have different laws with respect to sales tax. Sometimes sales tax rates differ based on product type, some taxes differ based on where the product is consumed, and some differ depending on where the item is purchased within the restaurant.

If your local laws require you to charge sales tax on all items and the rate is the same for all products with no regard to where they are consumed then follow these directions. When you define your products check the **Taxable** option as well as the **Tax Dine In** and the **Tax Dine Out** fields. These are the defaults when new products are added.

If your local laws require you to charge sales tax but only on dine out items then follow these directions. When you define your products check the **Taxable** field and uncheck the **Tax Dine In** field and check the **Tax Dine Out** field.

If your local laws require you to charge sales tax on all items but the tax is a different rate for some items (i.e. alcohol) then follow these directions. When you define your products check the **Taxable**, **Tax Dine In**, and **Tax Dine Out** options. Then enter the unique tax rate in the **Unique Tax Rate** field. When this item is sold the sales tax will be calculated using the unique tax rate.

If your local laws require you to charge sales tax on all items but the tax on the same item is a different rate when purchased at the bar (i.e. alcohol) then follow these directions. Go to **Manager Functions** and select **Miscellaneous Definitions**. Check the option **Enable Product Bar Tax For This Station**. Now, whenever you define a product enter the tax rate into the **Bar Tax %** field. From this point on, when that item is purchased at the bar its sales tax will be calculated at the **Bar Tax** rate.

6.9 How Do I Assign Prices At the Time An Item Is Ordered?

To allow an item to be assigned a custom price at the time the item is ordered on the POS screen, select **Restaurant System > Manager Functions > Define Menu Items**. When you are adding a menu item or modifying a menu item you can check the option to **Allow Custom Price**. This causes a screen to pop up when this item is sold at the POS screen. On this screen you can key in the custom price. As an example, you might use this function if you were selling lobster and charging different prices based on the weight of the lobster.

6.10 What Prices Have Priority Over Other Prices (i.e. Standard Price vs Lunch vs Daily)?

If you mark an item as requiring a custom price, that price will be hand entered each time the item is sold and that pricing takes precedence over all other pricing. Next happy hour, and lunch hour pricing takes precedence. Then pricing for each day of the week takes precedence. Lastly, dine in and dine out pricing is used. For example, dine in pricing will be used unless there is a special price for the day of the week (i.e. Tuesday). But if you have both a special price for the day of the week and a happy hour price set, the happy hour price will take precedence if you are in the period of time that is defined as happy hour.

6.11 How Does Promotional Pricing Work In The Restaurant POS Software?

Promotional pricing will take precedence over dine in, dine out, lunch hour, happy hour and day of the week pricing. Promotional pricing basically takes precedence over all pricing except custom pricing (where you enter a price each time you sell an item). The price is effective based on the start and end dates entered for the promotion. Outside of those dates standard pricing is used. To define promotions go to the manager menu and select define products. One of the options on the define products menu is **Promotional Pricing**.

This promotion function allows you to set promotional pricing for products you sell. These prices can be set on one product, for products in a department and/or type, all products supplied to you by the same vendor, or you can set a custom filter to separate the products you wish to set promotional pricing for. The promotional pricing can be set by either a percent discount or a specific sale price. Before the sale begins you can have all the promotional pricing defined and then when the start date arrives the system automatically will charge the pre-defined promotional pricing. The system will automatically return to the products regular pricing on the end date you have specified. (Dates are taken from the computer clock.)

6.11.1 Promotions For Single Product

Product Id:	Enter product id for the product you are putting on promotional pricing.
Standard Pricing:	The system will display the standard price for this product.
Percent Disc:	Enter the per cent of discount for this promotion.
Sale Price:	The system will calculate the sale price for this product based on the standard price and the discount.
Start Date:	Enter the start date for this promotion. The system will automatically use the promotional price beginning on this date.
End Date:	Enter the end date for this promotion. The system will automatically end the promotional pricing at the end of this day.

6.11.2 Promotions By Department and Type

Department (999=All):	Enter the department code for a specific department or enter "999" for all departments.
Type (999=All):	Enter the product type code for a specific product type within a department or enter "999" for all product types within a department.
Percent Disc:	Enter the percent of discount off standard pricing for this promotion.

Start Date: Enter the start date for this promotion. The system will automatically use the promotional price beginning on this date.

End Date: Enter the end date for this promotion. The system will automatically end the promotional pricing at the end of this day.

6.11.3 Promotions By Vendor

Vendor Id: Enter the vendor whose product will be on promotional pricing.

Percent Disc: Enter the percent of discount off standard pricing for this promotion.

Start Date: Enter the start date for this promotion. The system will automatically use the promotional price beginning on this date.

End Date: Enter the end date for this promotion. The system will automatically end the promotional pricing at the end of this day.

6.11.4 Promotions By Custom Filter

Percent Disc: Enter the percent of discount off standard pricing for this promotion.

Start Date: Enter the start date for this promotion. The system will automatically use the promotional price beginning on this date.

End Date: Enter the end date for this promotion. The system will automatically end the promotional pricing at the end of this day.

6.11.5 General Promotion Definitions

The general promotions definition screen is a product browse screen that shows you all products and allows you to enter a start date, end date, and price for any product. The promotion and price will be active for that date range.

6.11.6 Backup Current Promotions

This function will backup current promotions. New promotions can then be created. When the new promotions have expired you can restore the backed up promotions. This allows you to have more than one set of promotions defined. This function requires the master password.

6.11.7 Restore Backed Up Promotions

This function will restore backed up promotions. This allows you to restore pricing at the end of a promotion. This function requires the master password.

6.11.8 *Clear All Promotions*

This function allows you to clear your promotions and gives you three options. The first option allows you to clear all promotions or only out of date promotions. The second option allows you to select “Y” to clear all promotional prices from the system. The third option allows you to select “N” to clear only outdated promotional prices.

6.11.9 *Print Promotions*

This function allows you to print promotional product IDs, pricing and dates for promotions. You can print all promotions, print promotions not expired or print promotions for specific dates.

6.12 How Do I Enter And Track Dinner Reservations?

To enter a dinner reservation go to the restaurant POS screen. After entering in your server number, select **Misc** functions. Then select the **Table Management** functions button. The screen you are looking at here has green buttons for tables that are available and yellow buttons for tables that are occupied. The occupied tables also show how many minutes they have been occupied. Next, press the **Process Reservation** button. On the right side of the screen that is presented to you, you see the tables that are available in table area 1. Each table has a field **Tops** that shows the number of seats available at the table. The **Prior** field will show the end time for any prior reservation that exists for the table and the current date. The tables that appear in the **Open Tables** window are the tables that are available for the date, start time and end time that are displayed on the screen. The date and the start and end times can be modified to match the requests of the customers. When they are modified, the software will show all the tables that are available for reservations.

To enter a reservation, first enter the account number for the customer, usually a phone number or an account number created from their last name. Then enter the customer’s name and phone number. Next, enter the number of guests for the reservation. Now you can select the **Add** button for each table you need for this reservation. Once you have selected all of the tables, press the **Save** button.

To switch between areas press the area buttons. To assign the number of seats for each table, select the **Assign Tops** button. Tables with 0 tops cannot be assigned to a reservation. To view current reservations select the **View Reservations** button. To delete a reservation select the **Delete Reservations** button. To print current reservations select the **Print Reservations** button.

When the customer comes to fill the reservation, you can assign a server and the actual table that will be used by selecting the button **Assign Server**. This process will open the table for that server.

6.13 Can Employees Clock Into The Time Clock With Different Jobs At Different Rates?

Yes, a single employee can have up to three different jobs with different rates. To set this up you go to **Restaurant System > Manager Functions > Define Employees** and choose to modify or add an employee record. Here you can assign three different wage rates and a description for each. Click in the **Job Code 1** field and select F8 to see a list of available descriptions. Additional jobs codes may be added from the define employees menu. The descriptions you assign (i.e. "Cook", "Server", "Cashier") will be displayed on the time clock login screen. The employee selects the appropriate job. The rate for this job and hours worked will become part of the next payroll for this employee and will print on the payroll check.

6.14 Can I Assign a Negative Price To a Side List Item or Custom Side List Item?

There may be times when you want to reduce the price of an item if sides are remove. For example, you may have sides like "No Cheese" or "No Meat". In this case you may want to reduce the price of an item when the side list removes part of the item. When you add the item to the side list simply change the price to a negative amount for the side item.

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7 BPA Rapidserver Handheld Restaurant Tablet



Business Plus Accounting Restaurant Professional integrates with BPA RapidServer Tablet PCs to provide a mobile platform for servers to process orders and submit them to the kitchen. Keeping servers on the floor interacting with the customers improves customer service, increases sales per ticket, and decreases table times allowing you to serve more customers. The wireless, real time connection between BPA RapidServer Table PCs and the Business Plus Accounting restaurant software allows instant communication from the server to the kitchen.

7.1 System Requirements

BPA RapidServer is compatible with a 7" Android tablet PC running Android 3.0 or above. BPA RapidServer Tablet PC's are compatible with Business Plus Accounting Restaurant Professional 8.2. You must have a Windows XP Professional, Windows 7 Home Premium or above, or Windows 8 PC with BPA Restaurant Professional 8.2 installed. You must also have a network connection available on this computer. The Tablet PCs connect with your network using wireless networking technology. You must have an 802.11g/n compatible wireless router, base station, or access point available on your network.

7.2 Server Setup and Installation

BPA RapidServer uses Microsoft Internet Information Services to communicate between your RapidServer Tablet PCs and your BPA restaurant software. The server configuration must be

performed by Business Software Solutions technical support. To have your server configured please contact Business Software Solutions at (801)336-3303 Monday through Friday, 8:30am-5:00pm.

7.3 Handheld Setup

The BPA RapidServer software comes pre-installed on the Tablet PC. You will need to set up the wireless network connection on the Tablet PC. To connect the RapidServer software to your BPA installation you must know the IP Address of your server computer. The IP address of the server computer must be set to a static address to ensure that it will not change.

When you start BPA RapidServer for the first time, you will need to select **Options** from the main screen. Proper configuration of these options allows RapidServer to communicate with the BPA installation on your server.

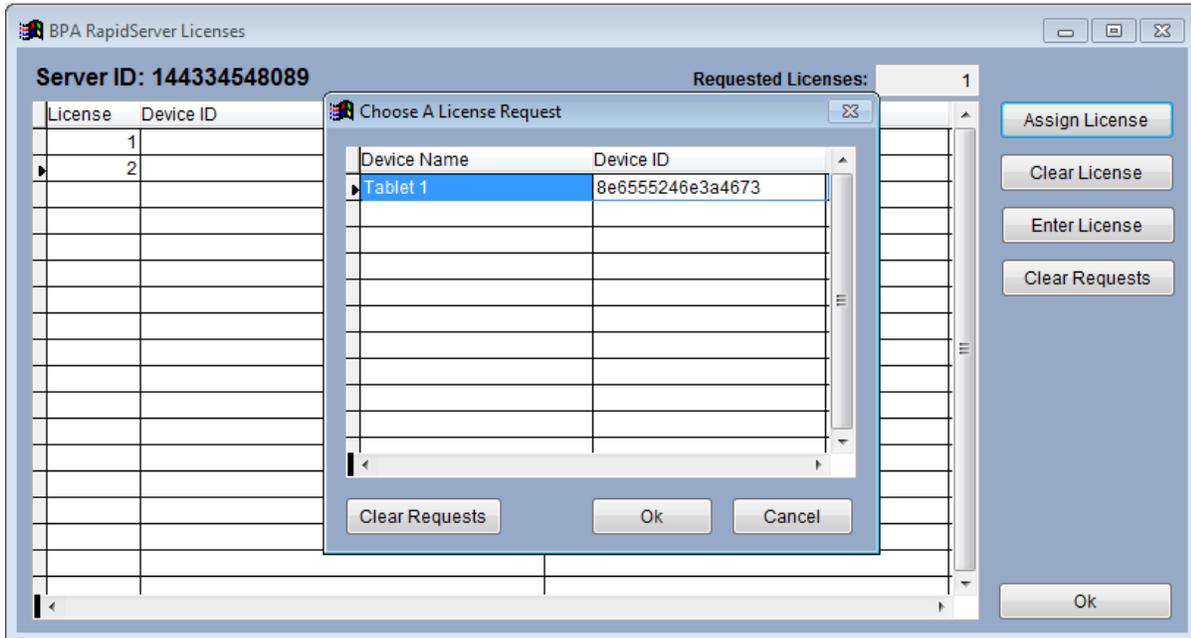
URL: Enter the network IP address to the RapidServer web service. This address must be a static IP address assigned to the server to ensure it does not change.

Server Type: For most installations of RapidServer, choose the **Standalone WCF** option.

User ID: Enter a valid login name for your server computer in this field. The default login is “bpars”.

Password: Enter the password for the login name you specified. The default password is “bpars”.

Once the license had been entered it must be assigned to the device. On the handheld device open the **Options** screen. Click **Request License**. Once the license has been requested you will see the number in the **Requested Licenses** box change. To assign a license click **Assign License**.



You will see the device name and id listed. Select the device and press **Ok**. You will now be able to server in and place orders on the RapidServer device.

7.5 Handheld Operation

Before logging in using a BPA RapidServer Tablet PC, servers must clock in on a terminal based PC. Once the user is clocked in to BPA, they can log in on the handheld unit by tapping the **Server Login** button. The user will be required to enter their server ID.



The process of working with tickets on the handheld is divided into 3 main screens accessible by using the tab buttons along the bottom of the screen. These screens are **Select Ticket**, **Menu**, and **View Ticket**.

7.5.1 Select Ticket Screen

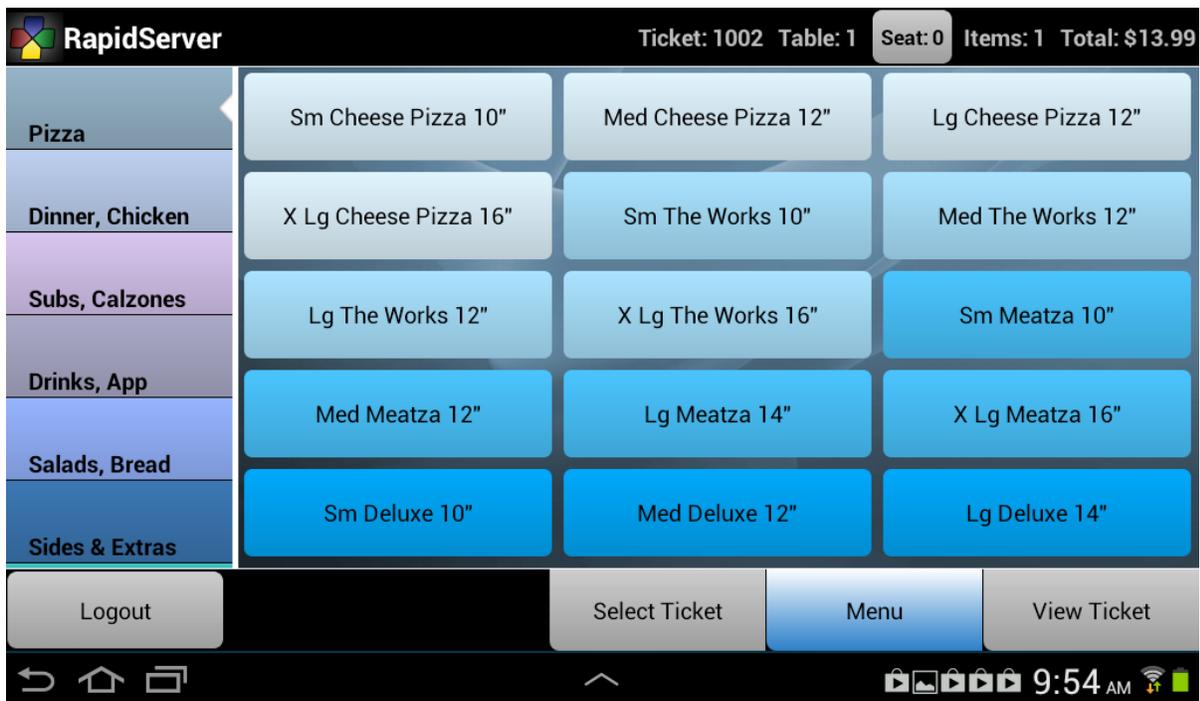


Use this screen to select current tickets and change between tickets. Simply select the ticket you want to work with. The system will then automatically change to the **Menu** tab. To create a new ticket, tap the **Quick Sale** or **New Ticket** button.

Quick Sale Selecting quick sale will automatically assign a table number. You may choose to change the guest count, enter a table name, and select whether the order is a Dine In or Dine Out order. When you are finished entering order information press **OK**. The table will be started and system will switch to the menu screen.

New Ticket Pressing New Ticket will bring up the table area screen. You may select different table areas on the left and then select the table to start the order. You can choose to change the guest count, enter a table name, and select whether the order is a Dine In or Dine Out order. When you are finished entering order information press **OK**. The table will be started and system will switch to the menu screen.

7.5.2 Menu Screen

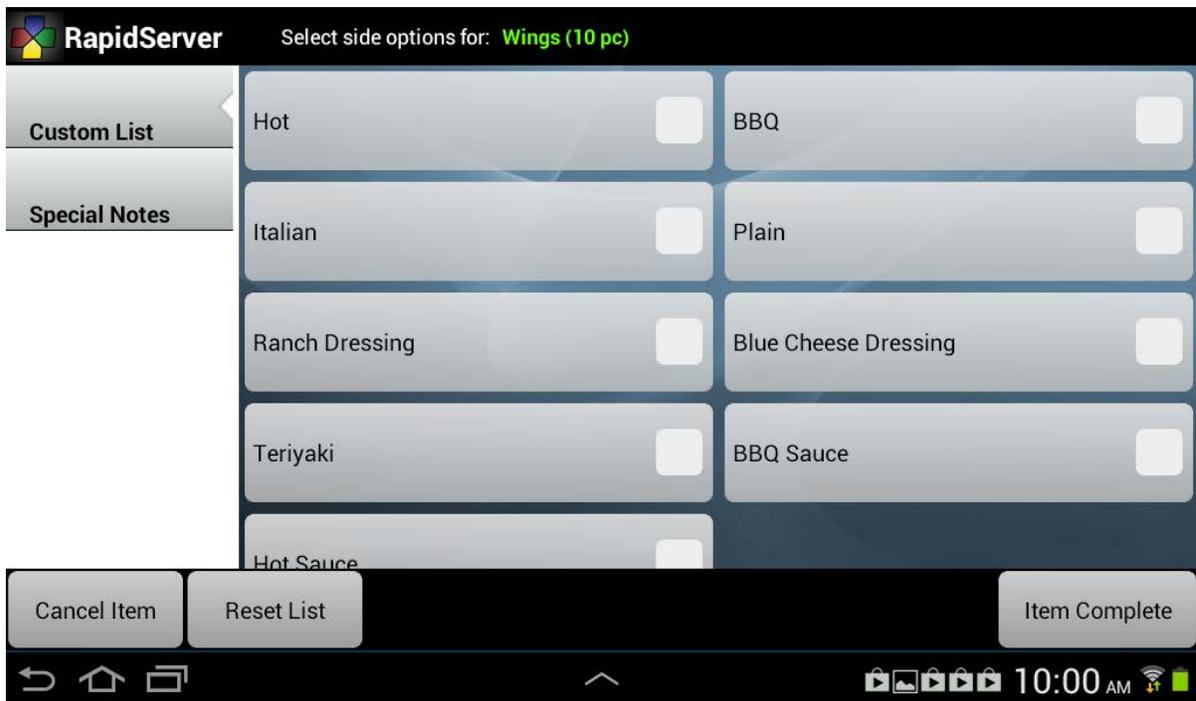


The menu screen allows you to add menu items to the ticket. The menu items are arranged the same way they are in the BPA Restaurant POS screen. There are 14 menu tabs and each menu tab can contain hundreds of items. If there are more items assigned to a menu than can appear on the screen at one time, you can scroll through menu items by swiping up and down on the screen. The 14 menu groups are displayed on the left side of the screen. You may swipe up and down to scroll

through the menu groups. Items in each menu are displayed in the same order and using the same button colors as the desktop BPA software.

The top of the menu screen displays the ticket number, current table, the number of items currently assigned to the table, and the current total for the table, including tax. You may also use the **Seat** button to select a seat before adding items to the order.

If you select an item that includes side list options, you will see a modifier screen which allows you to select the sides for that item. Each available side list will be displayed down the left side of the screen. When you select a list, you will see all of the items assigned to that list in a scrolling list on the right. Check or uncheck items by tapping on them. Selections are remembered so if you have to go back and forth between side lists it will keep the items you have already selected.



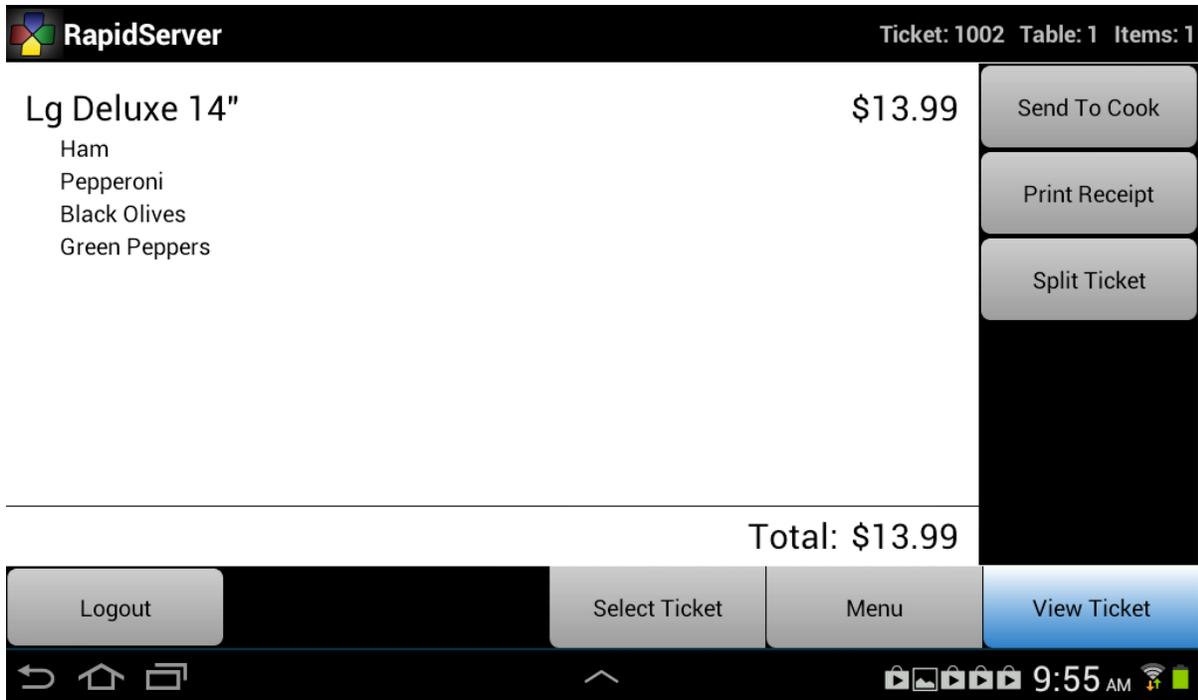
If you select a side item that includes a sub-sides list, you will be presented with another list allowing you to select options from that sub-sides list.

Tap the **Item Complete** button when you have selected all of your modifiers.

If you add an item erroneously, or make mistakes entering your modifiers for an item, you must edit those items from the **View Ticket** tab.

Once you have finished entering items, you will need to send them to the kitchen. This is done from the **View Ticket** tab as well. You can come back to the **Menu** tab at any time as long as the table is still open.

7.5.3 View Ticket



The **View Ticket** tab allows you to review the current order, make modifications to the order, and submit it to the kitchen.

To submit a ticket to the kitchen, tap the **Send To Cook** button. If some items on the ticket have already been printed, the software will notify you and ask whether you want to print just new items.

Kitchen tickets will be printed using the printer configuration from your server computer.

Edit Item: To edit the modifiers on an item or add special notes to an item, click on the item you wish to modify and select **Modify Item**. When you are finished modifying the item select **Item Complete**.

Remove Item: To remove an item simply click on the item and select **Delete Item**. You will be asked to confirm if you would like to remove the item.

Send to Cook: Sends the currently selected ticket to the kitchen.

Print Receipt: Prints the customers receipt on the selected printer.

Split Ticket: You may use the **Split Ticket** function to assign items to different guest checks. Selecting **Split Ticket** will display a button list of each menu item that has been ordered. All items will show they are assigned to guest 1. To assign items to a different guest select the **Pick Guest** button. Select **2** and press **OK**. Click on each menu item guest 2 will be paying for. You will see a 2 appear next to each item selected. Follow this same process to split the ticket

for additional guests. You may also select the **Split by Seat** button to automatically split the ticket by individual seats that were assigned at the time the order was placed. Press **OK** when you are finished.

To select a different table or create a new table, tap the **Select Ticket** tab. To add more items to the current ticket, tap the **Menu** tab.

7.6 Communication With the Server

BPA RapidServer communicates in real-time with your server as long as a network connection is available. However, it stores a local copy of much of the data to improve performance and reliability. Definition data such as product lists, menu items, modifiers, employees, and table areas must be reloaded every time that data changes on the server. This data is saved in a local database on the device. Each time the software is restarted or a connection test is performed this information is automatically updated on the Rapidserver device.

Each time the server logs on, the system will download the current open tables for that server. Additionally, the RapidServer software will regularly check for data which has been entered on the server, and update itself with that data. Items for a ticket can be entered on both the RapidServer tablet, as well as on the server. You should not try to work the same ticket on multiple tablets at the same time. You should also not try to use the same server number on multiple tablets at the same time.