



Restaurant Pro express
Point of Sale Solution for Restaurants

Getting Started Guide

Includes 10 Quick Steps To Ringing Up Your First Sale



pcAmerica
Retail and Restaurant Solutions

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Configuring Restaurant Pro Express

Registering Restaurant Pro Express

Your copy of Restaurant Pro Express must be registered before use. To register your software, choose **Register** from the **Register** menu in the **Login Screen**. Restaurant Pro Express will prompt you for your activation number; enter the serial number on the side of your RPE box.

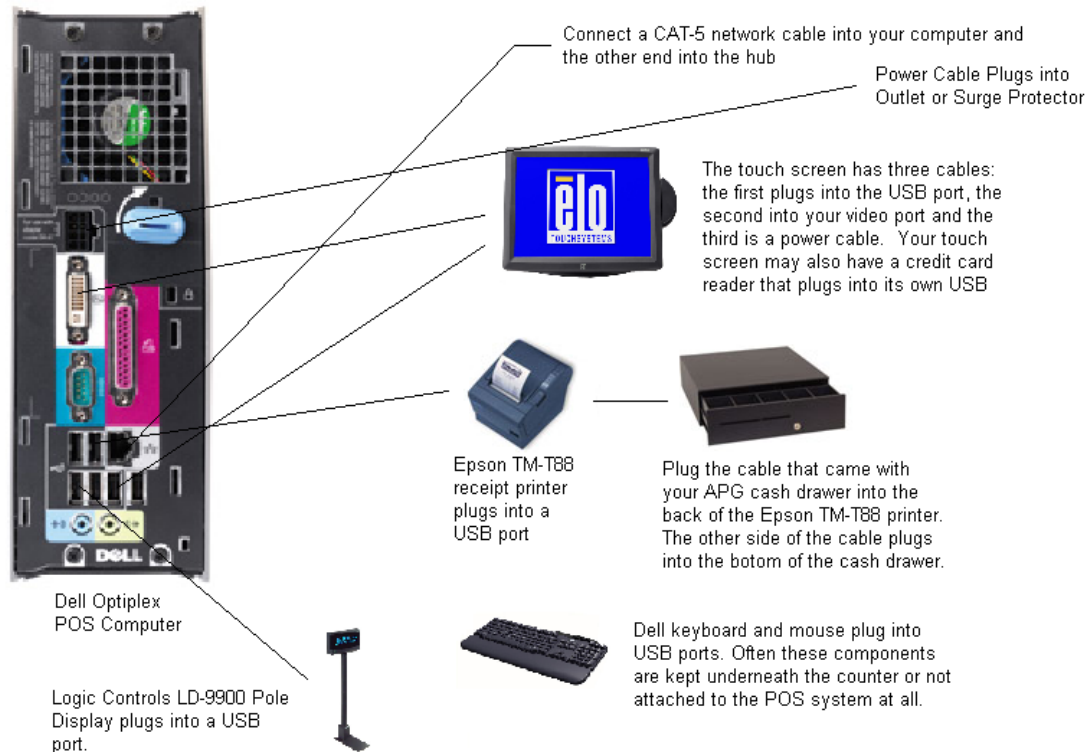
After entering your activation number, Restaurant pro Express will access the PC America registration server over the internet to register your software.

NOTE: The registration process requires an active internet connection. If you do not have an internet connection, please contact your PC America sales representative to manually register your software.

10 Steps to Getting Started

Step 1 - Plug in the Equipment

The first step of setting up your point of sale system is plugging in the equipment. The diagram below shows you where each device plugs in. Some of the devices require 'hardware drivers' which is what your computer uses to talk to each piece of equipment. Instructions of how to install these drivers are included below and also inside of the built-in F1 Help Section.



Some of the drivers may be installed with Restaurant Pro Express. For instructions on installing additional drivers, refer to the 'Hardware and Driver Installation' section. We recommend you read the driver installation pages below for both the Logic Controls pole display and the ELO Touch Screen before plugging them in – it may be easier to install these two drivers immediately upon plugging the devices in!

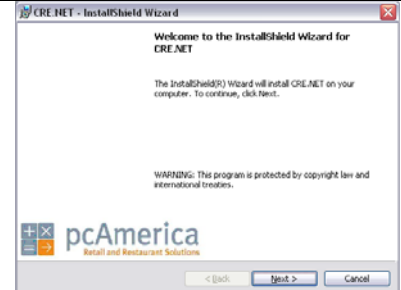
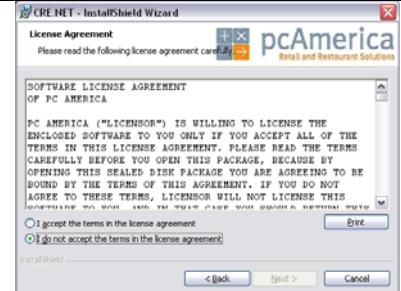
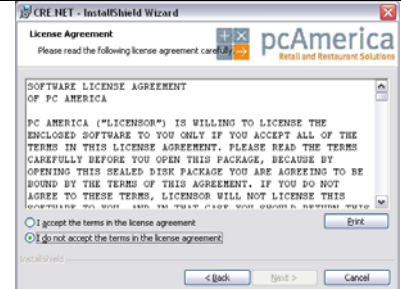
10 Steps to Getting Started

Step 2 - Install and Start Restaurant Pro Express

Below are instructions on installing Restaurant Pro Express and starting it for the first time. You must be logged onto your computer as an Administrator with full access rights in order to properly install Restaurant Pro Express.

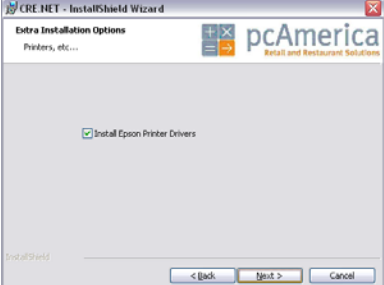
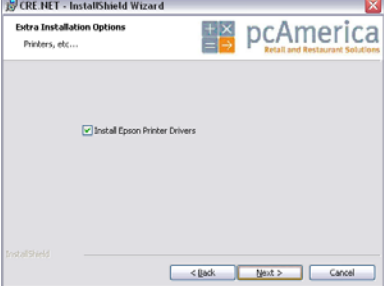

If you have multiple stations within your restaurant, it is very important that you **install the server first!** We also recommend you read the **Configure Multiple Stations** section later in this manual.

If you have multiple restaurants communicating to a corporate office, it is recommended you sign up for a PC America training session to ensure you fully understand the process.

	1. Insert the Restaurant Pro Express CD into the CD-ROM drive. The RPE installer should automatically launch and bring you to the next step.
	2. Depending on your computer, the Restaurant Pro Express installer may install a few pre-requisite files and applications. If you are not currently using a version of SQL Server Express, the install will automatically install and configure a new instance of SQL Server Express Edition with the instance name PCAMERICA, username sa and password of pcAmerica. This password should be changed for security reasons.
	3. The installer will guide you through a few informational and user license screens. Make sure to accept all license agreements and hit the Next button whenever prompted.






10 Steps to Getting Started

Step 2 – Install and Start Restaurant Pro Express

	<p>4. Restaurant Pro Express will automatically install and configure the most common Epson receipt and kitchen printer drivers for your convenience. If you would like to suppress the installation of these drivers, uncheck the Install Epson Printer Drivers check box. It is recommended that you keep this option selected.</p>
	<p>5. The selections you make on this tab are VERY IMPORTANT to ensure that your data is shared between stations (if you have multiple registers) and up to the corporate office (if you have more than one location.).</p> <p>Select Install RPE Server if this is your server computer inside of a multi-station restaurant OR if this is your only computer using RPE inside of the restaurant and you want to communicate with your corporate office (if you own more than one restaurant.)</p> <p>Select Install RPE Client if this computer is NOT the server but you do have more than one terminal using RPE within the restaurant</p> <p>The only situations in which you should not select either of the above options are:</p> <ul style="list-style-type: none"> • If this is the ONLY computer using RPE in your restaurant and you do not have more than one restaurant. • If this computer is inside of your corporate office
	<p>6. Start Restaurant Pro Express by selecting it from the Programs menu in the Windows Start Menu.</p>

10 Steps to Getting Started

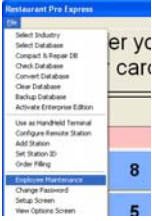
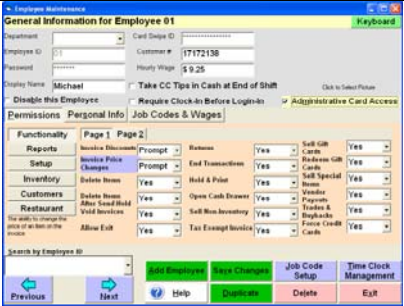
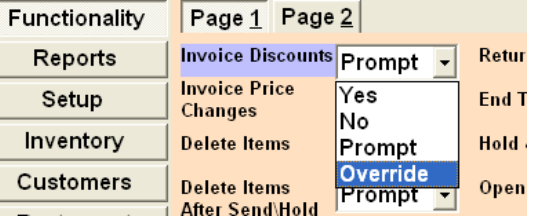
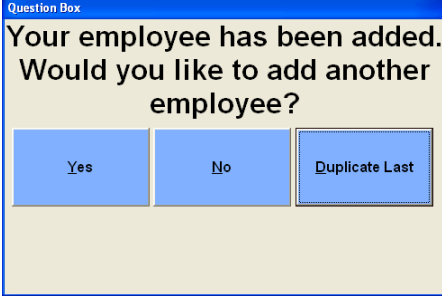
Step 2 – Install and Start Restaurant Pro Express

	<p>6. The first time you start Restaurant Pro Express, the Welcome Wizard will be displayed. Click Next >>> to begin the RPE Configuration Wizard and configure this station for use.</p>
	<p>7. Restaurant Pro Express will prompt you to select your Industry Type. Select A Corporate Office for a Chain of Stores or Restaurants ONLY IF this computer is an office computer in your corporate office (not an office computer in the restaurant.) Otherwise, choose A Fine Dining Restaurant with Table Service or A Quick Service Restaurant with Counter Service depending on your type of restaurant.</p>
	<p>8. The next screen in the wizard will be the Database Selection tab.</p> <ul style="list-style-type: none"> • Select Connect To My Server if you have more than one station and you have already installed your server. For more information, see the Configure Multiple Stations section later in this manual. • Choose Start a New Store or Restaurant if this is a single station restaurant or if it is the sever station for a multi-station restaurant
	<p>9. Depending on the above selections, you may be asked Does this computer communicate with a corporate office? Choose Yes if you have a chain of restaurants and this restaurant sends data to and receives data from a corporate office. Select No if you do not have multiple restaurants.</p>
	<p>10. If you are not connecting to a corporate office, Restaurant Pro Express will proceed to the Login Screen after a brief loading process. If you are connecting to a corporate office, you will be prompted for the corporate office information before progressing to the Login Screen.</p>

10 Steps to Getting Started

Step 3 - Add Your Employees into the System

Employees are configured within the ‘Employee Maintenance’ screen of Restaurant Pro Express. Cashiers and servers must be added into the system before they can log in and ring up sales. Other types of employees can be added and their hours tracked within RPE, even if their jobs don’t require them to use the POS. The steps below describe how to add your initial cashier into RPE; the ‘Employee Maintenance’ section later in this manual will describe additional employee options, job codes and how to record employee hours.

	<p>1. From the ‘Login Screen’, select ‘Employee Maintenance’ from the ‘File’ menu. Only the administrator can access this screen; enter the default administrator password ‘admin’ (without the apostrophes) to proceed.</p>
	<p>2. Click the ‘Add Employee’ button to create a new employee record. Assign a unique Employee ID (which could be their initials or some other unique identifier), password and a ‘Display Name’ that prints on the receipt. If you would like to assign a secure login card to this employee, swipe the card in the ‘Card Swipe ID’ box.</p>
	<p>3. Assign security permissions by touching the dropdown list and selecting Yes (the employee can do this), No (they can not), Prompt (they can with managers permission) or Override (they can and are a manager for this function.)</p>
	<p>4. Touch the ‘Save’ button. Your employee has been added! Add any additional employees you wish to configure and then touch the ‘Exit’ button to go back to the Login Screen.</p>

10 Steps to Getting Started

Step 4 - Configure a Few Setup Options

Restaurant Pro Express has hundreds of built-in features that can be turned on or off. The 'Setup Screen' includes many of these options, organizing them into multiple tabs. You can access the 'Setup Screen' from the 'Login Screen' by clicking on the 'File' menu and 'Setup Screen' – you must use the administrator password to enter this screen (default: admin.) Global settings only need to be configured once for all stations while settings that are not global need to be configured once at each station. Below is a chart of recommended feature settings per vertical:

Feature	Tab	QSR	Table Service	Delivery	Drive-Thru	Global
'Prompt Cashier ID', requires a server or cashier to login for every check	Invoice Settings		X			
Change the 'Receipt Size' to 'Short Receipt' to print only the most important information	'Receipt'	X	X	X	X	
Enter the company information that prints on the receipt	'Company Info'	X	X	X	X	X
Enter necessary credit card information if you are processing credit cards through Restaurant Pro Express	'Credit & Debit'	X	X	X	X	
Select the 'Detailed' Amount Tendered screen to allow for multiple credit cards on one check	'Station Specifics'	X	X	X	X	
Quick Change is a great way to select common currency types in fast paced operations	'Quick Invoicing & Alerts'	X		X	X	
'Quick Tender' will show the amount of change on the invoice screen, eliminating a touch from every transaction	'Quick Invoicing & Alerts'	X		X	X	
'Stock Prompt' is only useful if you are tracking your inventory, otherwise it will pop up an unnecessary message that you are out of stock	'Restaurant Features'	X	X	X	X	
'Reason Codes' allow you to choose a reason why you are voiding, comping and discounting items	'Restaurant Features'	X	X	X	X	X
'Prompt Table' enables table tracking and tabs; combine this with the 'Table Selection Screen' to configure how you operate within your restaurant.	'Restaurant Features'		X			
'Order by Guest' tracks which guest ordered which meal, preventing the need to auction meals at the table.	'Restaurant Features'		X			

You can read about the other settings and options in the 'Setup Screen' in our 'F1 Help Section' built into Restaurant Pro Express.

10 Steps to Getting Started

Step 5 - Create Your Menu Items

Your menu is separated into separate groups called **Departments**. A few examples of departments are **Appetizers**, **Desserts**, **Pastas** and **Value Meals**. Departments are used to organize your menu items on the screen and also to report on your items. After your departments are created, you create menu items inside of each of your departments.

To begin creating your menu, touch the **Manager** Button on the top right of the **Login Screen** and enter a username and password (default username: 01, password: admin.) Navigate to the **Inventory Maintenance** screen inside of the **Administrative** tab.

To add a new department, touch the blue **Department for this Item** link in the top left of the screen. This will bring you to the **Department Maintenance** screen. Touch the **Add Department** button, type in a department ID (ex: APP) and description (ex: APPETIZER) and touch **Save**. After adding the department, touch **Exit** to return to the **Inventory Maintenance** screen.

General Information for Blended Cappucino			
Department for this Item	Smoothies	Item Type	Standard
Item Number	BLENDCAPP	Cost	\$1.00
Description	Blended Cappucino	Price you charge	\$3.95
		# In Stock	0
			<input checked="" type="checkbox"/> Tax 1 <input type="checkbox"/> Bar Tax
			<input type="checkbox"/> Tax 2
			<input type="checkbox"/> Tax 3

To add a new item, touch the **Add Item** button on the bottom of the **Inventory Maintenance** screen. The required information is on the top one-third of the screen:

- The **Department** this item will be inside of (ex: Smoothies)
- A unique **Item Number** (ex: SM001, or an abbreviated form of the item name)
- A **Description** which will print on the receipts
- Your **Cost**, which is the price you pay
- The **Price you charge** the customer
- An optional **# In Stock** value if you track ingredients or portions
- Various tax options if you charge tax for this item

Touch the **Save** button and the item will now be added to your menu. See the next step to change the default format of your button and customize with your own colors.

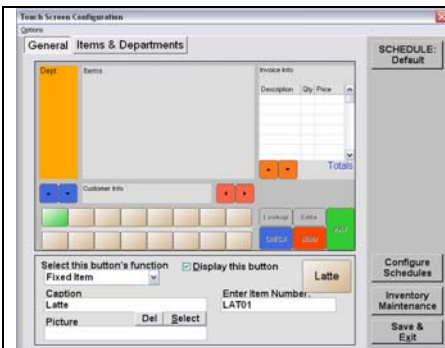
TIP: Most restaurants apply modifiers (such as meat temperatures, toppings, side dishes, etc.) to their items. See the **Menu Items, Recipes and Your Inventory** section to configure modifiers and for more details on configuring your menu.

10 Steps to Getting Started

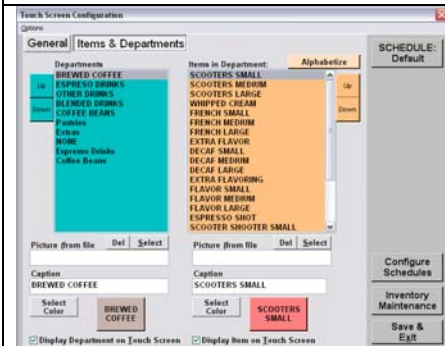
Step 6 – Configure Your Menu and Function Buttons

The menu screen where you place your orders is a highly customizable screen. By default, menu items are displayed in the order you add them. The button is a default color. This configuration can be changed easily.

To change the look of your menu, and configure function buttons and best sellers, touch the **Manager** Button on the top right of the **Login Screen** and enter a username and password (default username: 01, password: admin.) Navigate to the **Touch Screen Configuration** screen inside of the **Setup** tab.



The **General** tab is used to configure the custom buttons on the bottom of the screen. To assign a function or a best seller to a custom button, touch the button on the screen (it will highlight in green), choose the function from the **Select this button's function** dropdown and fill in the information beneath. Make sure to check **Display this Button** to display it on the screen. A popular use for a function button is for best sellers, which is a menu button that will be on the screen no matter what department you are in. – to assign one, choose the function **Fixed Item** and fill in the item number in the box below.



The functions in the **Items & Departments** tab are used to change the order, color, caption and picture of your menu buttons. You can also choose to make certain items or departments invisible.

- To change the color of a department or menu item button, click on the department (in the left list) or menu item (in the right list) and touch the **Select Color** button
- Change the order of your departments or menu items by selecting them from the list and using the **Up** or **Down** button.


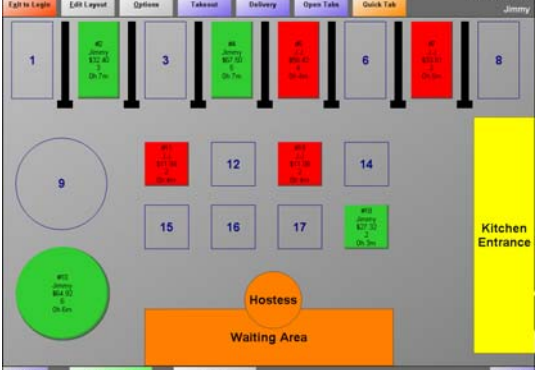
When you are finished making changes, touch the **Save & Exit** button. Your changes will display the next time you log into the menu screen.

TIP: Changes made to the menu on one terminal automatically update ALL terminals in real time. You do have the ability to design different menus for specific terminals in your restaurant without affecting the other terminals. For example, restaurants with a bar commonly have a different menu layout at the bar than at the rest of the restaurant. To do this, select the **Configure This Station Individually** menu option from the **Options** menu on the top of the screen. If this is checked, any layout changes made within **Touch Screen Configuration** will not affect other terminals.

10 Steps to Getting Started

Step 7 - Login To the System

Cashiers must log in to Restaurant Pro Express before they can ring up customers or enter orders. The 'Login Screen' prompts cashiers for a user name and password, or alternatively the cashier can swipe their card to gain access.

	<p>1. To log into RPE, simply enter your ID and password (default for the demo is '01' and 'admin'), enter the employees pin code or swipe the secure login card you configured in the 'Employee Maintenance' screen in Step 3 above. If you are a QSR and not using the table service features of RPE, you will go immediately into the restaurant invoice screen; otherwise you will proceed to number two below.</p>
	<p>2. If your establishment is a table service restaurant, select the table next. Your table layout can be configured to resemble your restaurant, with tables organized in different sections (ex: dining room, patio, bar) and options to vary shapes and sizes. Touch the 'Edit Layout' to modify your table layout from any station. Please refer to the Laying Out Your Tables for Fine Dining and Table Service section for instructions on configuring your tables.</p>



A secure login card helps prevent one cashier from logging in as a different cashier (which is a hole for theft.) Without a secure login card, cashiers must type in a user name and password, which is visible to others close by. The only way to log in with the card is to swipe the card, protecting the cashier's cash banks from others trying to steal money. You can buy these cards from PC America.

10 Steps to Getting Started

Step 8 - Ring in Some Items

Ringin up items is easy. Simply select the department the item is in (examples: appetizers, entrees, desserts, pastas, etc) and touch the menu items to add to the check. If the item has modifiers that apply to it (such as a meat temperature for a burger) RPE will prompt the server to make the choices and then add the item to the check.

The screenshot shows the RPE interface with a menu grid on the left, a list of items ordered on the right, and a total amount at the bottom right. The menu grid is organized by department: Brewed Coffee, Espresso Drinks, Other Drinks, Blended Drinks, Coffee Beans, Pastries, Scooters, French, Decaf, Flavor, Scooter Shooter, Cafe au Lait, Whipped Cream, Extra Flavor, Espresso Shot, Soy Milk, and Skim Milk. The list of items ordered shows: French Roast 16 oz. (1, \$1.60), Scooters Decaf 20 oz (1, \$1.75), Flavor of the Day 16 (1, \$1.60), Scooter Shooter 12 o (1, \$2.40), and French Roast 16 oz. (1, \$1.60). The total amount is \$8.95.

Department selection buttons

Item buttons; touch an item to add it to the order

Items ordered so far on this check with quantity & price

Custom buttons that you can use for one-touch access to our best sellers (or other commonly used functions.) For example, a coffee shop would have 'Medium Coffee', their best seller, as a one-touch button.

TIP: For table service restaurants, Restaurant Pro Express does allow you to assign each item ordered to the guest ordering it, using the **Order by Guest** features. The guest number for each item will print in the kitchen so the runner knows which guest ordered which menu items and doesn't have to "auction off the food." For help turning on this feature, please refer to the F1 Help Section.

10 Steps to Getting Started

Step 9 – A Few Basic Every Day Functions

You can access additional functions by touching an item on the invoice grid. Below is an explanation of each of these buttons.



To delete one or more items, touch the items (which will highlight them) and touch the **Delete** button.

To apply a discount to one or more items, touch the items (which will highlight them) and touch the **Line Disc** button. You will be prompted by a discount percentage.

If you would like to order more than one item, you can touch the item and touch the **Change Quantity** button. An alternate way of doing this is just touching the menu item button multiple times.

Modify is used to modify the modifiers that are already on an item..

Reorder Round is commonly used in a restaurant or bar where many people want to reorder the same item they previously drank. Touch the items you'd like to order and touch **Reorder Round**, which will up the quantity by one.

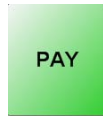
Transfer is used to transfer this check to a different table..

Touch the **Show Menu** button to deselect all the items you've selected in the invoice grid and go back to the menu buttons.

10 Steps to Getting Started

Step 10 - Cash – or Credit – Out the Transaction

Step 10 is the most important part of the transaction – taking the money. The three most common forms of payment in most restaurants are cash, credit\debit card and gift card.



To PAY for a transaction, touch the PAY button. This will bring up the amount tendered screen where you can pay using one or more payment methods.



Restaurant Pro Express's amount tendered screen is built for speed and flexibility. The default amount is always the exact amount remaining. To enter a payment, touch in the amount and touch the payment method. If paying by gift card, credit\debit card or check, RPE will ask you for more information. You can also enable one-touch quick payment buttons for the most common tender amounts. RPE supports split tendering, meaning you can pay with more than one tender.



To put a check on hold (for table service, or quick service where you pay at a separate counter), use the CHECK or SEND button. This check is then put on hold waiting for more items to be added or for the customer to finish their meal and pay their bill.

SPEED TIP Pay by credit card without touching a button; our unique 'swipe-and-go' feature allows you to pay by credit card or gift card without touching a button. All you need to do is swipe the credit card on the invoice screen and it will process the card. This is the fastest way to pay.

	<p>In table service restaurants, some parties will ask for separate checks. To split a check the server can touch 'EDITS' and then 'SPLIT CHECK.' Inside of the split checks screen you can split evenly (example split 3 ways), split by guest (if using the order by guest feature) or touch and drop items amongst different split check in any fashion you wish.</p>
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Congratulations! You've rung up your first sale inside of Restaurant Pro Express. You've covered the basics and can now use your new point of sale system. The remainder of this manual includes some useful information for configuring and using your Restaurant Pro Express point of sale system.



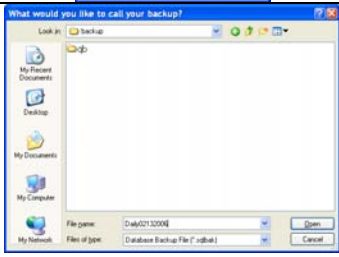
On the surface, Restaurant Pro Express is a very simple to use point of sale system. Cashiers can ring up customers quickly and accurately. Behind the scenes, however, your Restaurant Pro Express quick service restaurant point of sale system consists of multiple components, functioning together, that run on the Microsoft Windows operating system. Likely your computers are connected to the Internet for e-mail, credit card processing and a variety of other uses. In today's world of computers a variety of risks (both internal and external) exists that you should protect against.

Viruses and worms are malicious programs written by outsiders that can use serious damage to your data or even your computer. Unknown to you, these can be downloaded and installed on your computer by visiting an infected web page, downloading and running malicious programs or by an outside intruder access your computer from a different continent via the Internet. To protect yourself you should do the following:

- Install a router, which is an Internet buffer between you and the outside world. Routers help control who can access your computer and will help keep unwanted intruders out. Popular brands of routers include LinkSys and DLink, however you should do your homework and choose the router you feel most comfortable with.
- Install and activate a firewall which is an additional layer of protection against outside intruders.
- Anti-virus and anti-worm software runs on your computers and, if configured properly, can actively watch each of your actions and put on the brakes if you are about to download or use an infected file. It's important to scan your hard drive regularly for viruses and also keep current with the latest virus updates (which can change very frequently.) Popular brands of anti-virus software include Symantec (Norton Anti-Virus) and McAfee, however you should do your homework and choose the anti-virus software you feel most comfortable with
- Spy ware is another malicious form of software that can sneak onto your computers. The effects of spy ware vary from slowing down your computer to revealing your personal information with a wide array in between. Many anti-virus packages also protect you against spy ware, however you can also download additional packages that can scan for spy ware, eliminate it and protect against future infections.
- Hardware and database failure, while extremely uncommon, is a reality of life that you should protect against. Lightning may strike – literally – and fry a hard drive or files on your computer. The two best ways to protect against this are fairly simple. The first is to have a surge protector unit with a battery backup; common brands are APC and SmartPower, however you should do your homework and pick the one you are most comfortable with. The second way to protect yourself is to perform daily backups of your data that you keep off-site.

Computer Essentials
Backing Up Your Database

Your menu, inventory, customer records and entire sales history is stored inside of your database. It is highly recommended you backup your data on a daily basis in order to avoid loss of data due to unforeseen circumstances. It is very uncommon to lose data, however it can be catastrophic for a business to lose their entire database. It is **YOUR RESPONSIBILITY** to backup your database on a daily basis. In CRE/RPE, backing up your database can be done easily through the Database Maintenance section of the File Menu of the Log In Screen.

	<p>1. From the Login Screen, click on File, then Database Maintenance, and finally then Backup Database.</p>
	<p>2. Enter your Administrator's Password and click OK.</p>
	<p>3. Choose a backup folder and type a filename for the data backup file. We recommend using today's date and keeping a week's worth of backups at a time.</p>

You can never be too careful when it comes to backing up your system. The only way to recover from a catastrophic occurrence, such as a fire at your store, is to have an off-site backup copy of your database. We recommend using high capacity backup drives or any removable mass storage device as part of your backup system. A removable mass storage device usually plugs into your computer through a USB port and will be recognized by your computer as another hard drive. Your computer will assign a drive letter and will be available through the windows explorer (see picture above). You may remove this device from your business each and every day to ensure that you can be up and running quickly in case one of these catastrophic events actually takes place.



Hardware and Driver Installation

Logic Controls Pole Display



Pole displays face the customer and display the items you are selling as you ring them up. Other information such as amount tendered, change, the current day and time and discounts will appear on the pole display at the proper time.

	<p>1. Plug your USB pole display into the USB port on the back of your computer. Windows will automatically detect that new hardware has been plugged into the computer. Choose to install from a list or specific location and then click Next. If you are using a serial pole display that plugs directly into a COM port (and not a USB port), skip to step four.</p>
	<p>2. Insert the Restaurant Pro Express CD in your CD/DVD-ROM drive, click on Search for the Best Driver and check off the Search Removable Media check box. Click Next to continue; the wizard will search for the driver. If it asks you to grant permission to install the driver, always choose Yes or Continue.</p>
	<p>3. From the Login Screen, click on the File Menu, then Setup Screen and type in the Administrator password. Inside of the Hardware Tab, click on USB option under the Pole Display Port selection. Click the Update button at the bottom of the screen to save your changes.</p>

Additional Hardware Settings	
Credit Card Reader & Bar Code Scanner	
	

Credit card readers and bar code readers differ greatly but have two things in common. The first is they are both used to read data (either a magnetic card such as a credit card, or a bar code.) The second is they enter the information into the computer like a really fast typist – meaning they are as easy to install as keyboards – just plug them in!

Hooking up both devices is fairly easy. Both the credit card reader and the bar code scanner are plug-and-play, meaning you simply plug them in and they work without installing any software or drivers.

Credit card readers (also referred to as MSRs or Magnetic Stripe Readers) are fairly simple devices that allow you to swipe a credit card into Restaurant Pro Express. MSRs read the data on the magnetic stripe on the back of the card and automatically type it into Restaurant Pro Express. In addition to credit cards, you can also swipe gift cards, loyalty cards and security cards through the same reader.

Your ELO touch screen may have a credit card reader bolted to the side. While this provides for a nicer looking presentation, the credit card reader still has its own cable and is the same as described above.

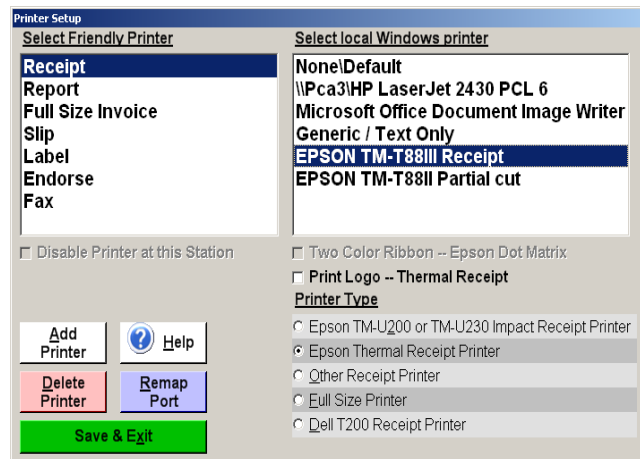
Bar code readers (or scanners) are used to scan bar codes on different products such as sodas, juice and milk containers, candy, t-shirts and other items. Loyalty cards can also use a bar code instead of a magnetic stripe reader. A simple scan of the item will read the bar code into the point of sale system and ring it up. Food items (such as hamburgers, pizza and tacos) obviously can't be bar coded, however, if you sell lots of items that do have bar codes than a bar code scanner will speed up your checkout.

Additional Hardware Settings

Installing Epson Receipt Printer

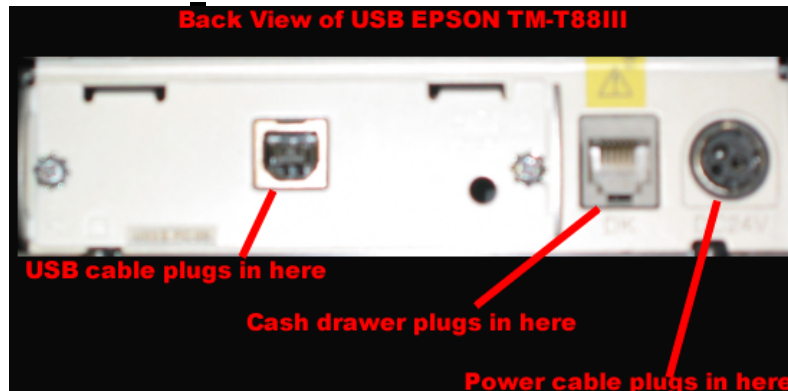


Restaurant Pro Express automatically installs and configures the most common Epson receipt printer drivers. It is still necessary to select which printers you are using to print your receipts inside of Restaurant Pro Express.



To select and configure your receipt printer within Restaurant Pro Express, access the **Friendly Printers** screen from the **Setup** tab of the **Options Screen**. Inside of the **Friendly Printers** screen, follow the below steps:

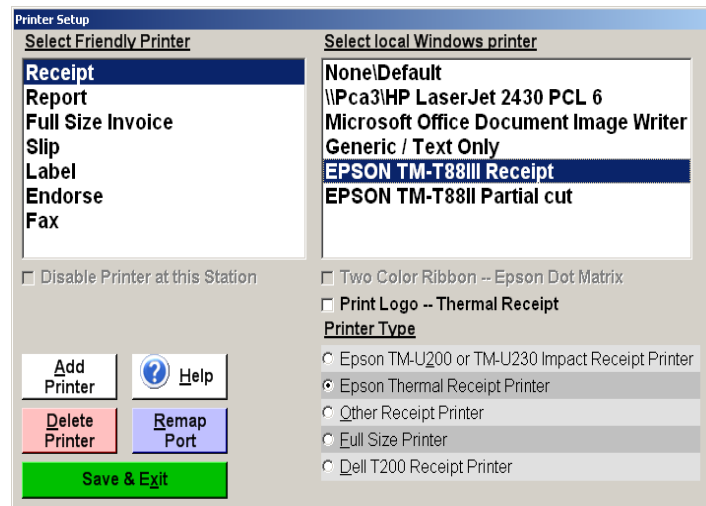
1. Select **Receipt** from the **Select Friendly Printer** box on the left side
2. Select the proper Epson driver from the **Select local Windows printer** within the right box. If you are using a USB Epson TM-T88 receipt printer you will choose the **Epson TM-T88III Receipt USB** driver.
3. Select **Epson Thermal Receipt Printer** from the list of **Printer Type** options
4. Touch the **Save & Exit** button



Additional Hardware Settings

Installing Epson Kitchen Printer

Restaurant Pro Express automatically installs and configures the most common Epson kitchen printer drivers. It is still necessary to add and configure the kitchen printers you are using inside of Restaurant Pro Express.



To add and configure your kitchen printers within Restaurant Pro Express, access the **Friendly Printers** screen from the **Setup** tab of the **Options Screen**. Inside of the **Friendly Printers** screen, follow the below steps:

1. Touch the **Add Printer** button
2. Type in a description for your new printer (examples: Kitchen, Bar, Grill, etc.)
3. Select your new printer from the **Select Friendly Printer** box on the left side.
5. Select the proper Epson driver from the **Select local Windows printer** within the right box. If you are using a parallel Epson TM-U220 receipt printer you will choose the **Epson TM-U220 Receipt LPT1** driver.
6. Select **Epson TM-220 or Epson TM-U230 Impact Receipt Printer** from the list of **Printer Type** options if the printer is connected to this computer. Select the mapped networked version if the printer is connected to another computer on your network.
7. Touch the **Save & Exit** button

Additional Hardware Settings

Cash Drawer

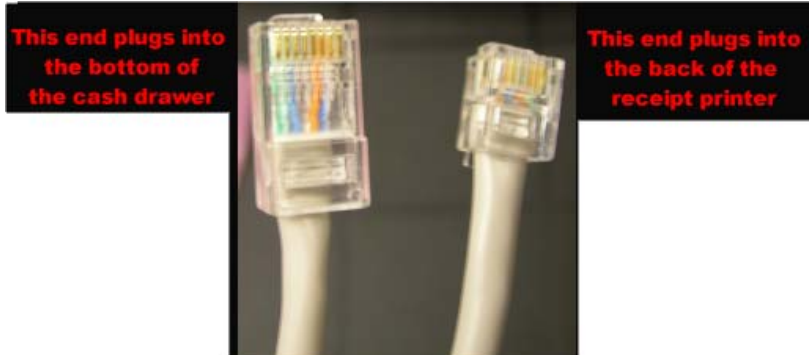


1. The majority of cash drawers plug into the bottom of the receipt printer. To install a Cash Drawer, first make sure the cable that comes with your cash drawer is securely plugged in to both the cash drawer and the receipt printer. A cash drawer cable looks similar to a phone cable. There is often writing on the cable that says 'TO PRINTER' and 'TO CASH DRAWER' to ensure it is connected correctly.

The screenshot shows the 'Setup Screen' with the 'Hardware' tab selected. Under 'Page 1', the 'Pole Display Port' is set to 'None'. Under 'Page 2', the 'PinPad Port' is set to 'None'. The 'Weight Scale - Counter' is set to 'None'. The 'Weight Scale - Floor' is set to 'None'. The 'Pole Display Type' is set to 'General'. The 'PinPad Type' is set to 'Verifone Pinpad 1000'. The 'Primary Scale Type' is set to 'CAS PD-1'. The 'Secondary Scale Type' is set to 'CAS PD-1'. The 'Default Cash Drawer Port' is set to 'Epson Receipt Printer Driven'. The 'Cash Drawer' section has 'Open Default Drawer' selected. The 'Signature Pad Type' is set to 'NONE'. The 'Scale', 'Update', and 'Exit' buttons are at the bottom.

2. Inside of the **Setup Screen**, drop down the **Default Cash Drawer Port** inside of the **Hardware** tab and select **Epson Receipt Printer Driven** if your cash drawer is connected to an Epson receipt printer (the most common.) This will pop open the cash drawer attached to your receipt printer for all cash transactions.

If you are using more than one cash drawer at a register, please refer to additional documentation or contact technical support for assistance.






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Restaurant Pro Express

Additional Hardware Settings

Installing the Elo Touch Screen

	<p>1. The ELO touch screen monitor has three plugs. The first is a standard power cable. The second cable is a USB cable which must be plugged into one of the USB ports on the back of your computer. The third cable will plug either into the VGA port or the DVI port depending on your computer. After connecting the touch screen, insert the CD that came with the ELO Touch Screen monitor which will start the ELO Setup Wizard.</p>
	<p>2. The ELO driver welcome screen will ask you what type of drivers you would like to install. Select USB (unless you are using a serial touch screen) and click Next to continue. Follow the prompts (clicking Yes and Next when applicable) to install drivers for the ELO touch screen.</p>
	<p>On the last page of the ELO Setup Wizard, click the Calibrate ELO Touch Screen Monitor button. A new window will appear instructing you on how to correctly calibrate and align your touch screen. Follow the on screen instructions. In the future, if you touch the screen and the mouse pointer is not directly beneath your finger, you will need to recalibrate the touch screen monitor.</p>



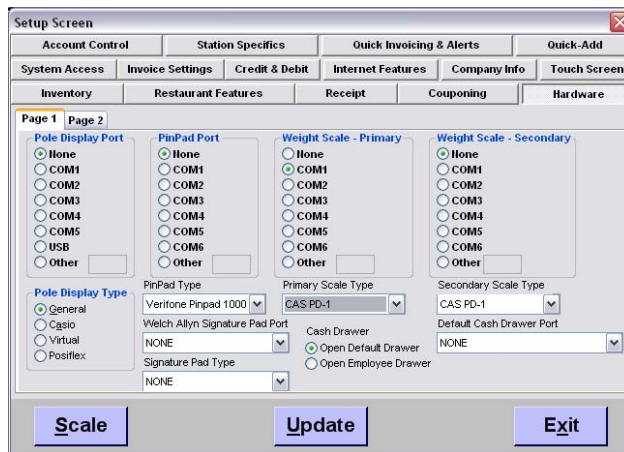
Additional Hardware Settings

Weight and Deli Scales

Restaurant Pro Express supports scales that are directly connected to the computer (where items are weighed at the register) as well as deli scales, where the items are weighed at the deli or other food preparation station, and a bar code label is printed and affixed to the item.



1. Restaurant Pro Express supports two types of scales that directly connect to the PC. The CAS PD-1 and the Weightronics NCI-6720 weight scales both connect to the serial port on the back of your computer.



2. Two options must be configured inside of the **Setup Screen** in order to use your scale. First select the your scale model from the **Primary Scale Type** dropdown. The second step is to select the serial COM port it is connected to from the **Weight Scale – Primary** list. RPE will ask you to enter an optional tare amount which is the weight of the container a weighed item is sold in (ex: a plastic salad container.) The tare value can also be set by the item inside of **Inventory Maintenance**.

NOTE: Checking off the **Auto-Weigh** property of an item (found in **Inventory Maintenance**) will automatically query the scale for a weight whenever you sell it.



Restaurant Pro Express can scan and properly interpret the standard UPC random weight bar codes printed by many deli scales such as the CAS LP-1000 or Hobart weight scales. This scale does not interface with the computer. For assistance in setting up your random weight bar code printing scale, consult the manual that comes with the scale or contact the manufacturer.

There are two types of passwords inside of Restaurant Pro Express.

Employee passwords are passwords that are assigned to an individual employee. A description of the use and configuration of the employee password is discussed in the 'Tracking your Employees' section.

The **administrator password** is the "super password" of the system which can be used to access any function inside of the software. This password should only be known to the owner and the administrator of the system. Standard employees and managers should not receive this password.



Change Password Screen

By default, the password is 'admin' – you should change this Day 1 of using the system to enhance your security. To change your password, choose the 'Change Password' menu link under the 'File' menu in the 'Login Screen.'

You can also assign create an administrator swipe card using the 'Change Password' screen. Swiping an administrator card takes the place of typing in the password, providing for faster and more secure overrides.

Configuring Restaurant Pro Express

Tax Rates

Set Tax Rate

Default Tax Rate

Area Tax Rates

	Store ID	Tax1 Rate	Tax1	Tax2 Rate	Tax2	Tax3 Rate	Tax3
	5192	0.25	Sales Tax	0.1	Liquor Tax	0	Tax 3

<

>

UPDATE

Cancel

The ‘Set Tax Rate’ screen is accessed from the ‘Setup’ tab in the ‘Options Screen.’ Restaurant Pro Express has three tax rates. Most restaurants use only the first tax rate, however some restaurants charge different tax for food and liquor. Change the percentage of the tax to match your local tax rate.

Set Tax Rate

Default Tax Rate

Area Tax Rates

ID	Area	Description	Percent
0	NONE	DEFAULT	0.000%
1	ROCKLAND	ROCKLAND	8.275%
2	WESTCHESTER	WESTCHESTER	9.000%
3	ULSTER	ULSTER	7.000%
4	ORANGE	ORANGE	7.500%

Add

Change Rate

Remove

UPDATE

Cancel

Some restaurants that deliver or ship food are required to charge the tax rate of the county or region where the food is being sent. Restaurant Pro Express allows you to configure different tax rates in different regions inside of the ‘Area Tax Rates’ tab. In order to apply an area tax rate to an order, the tax rate must be applied to the customer in customer maintenance and the customer selected for the invoice.

Configuring Restaurant Pro Express

Configure Your Receipt

The receipt you give to your customers can be more than a simple listing of items; it can be an advertising piece that will encourage your customers to come back to your restaurant. Receipts are configured in the 'Receipt' and 'Company Info' tabs of the Setup Screen.

Setup Screen

Account Control Station Specifics Quick Invoicing & Alerts Quick-Add

System Access Invoice Settings Credit & Debit Internet Features Company Info Touch Screen

Inventory Restaurant Features Receipt Couponing Hardware

Page 1 Page 2

Receipt Size

☐ Receipt

☒ Short Receipt

☐ Full

☐ Full Professional

Print Invoices

☐ No

☒ Yes

☐ Prompt

☐ CC Only

☐ Prompt Size

Print Logo

☒ None

☐ Picture

☐ Company Info

☐ Pic and Info

Print Modifiers on Receipt

☒ No, Print None

☐ Print all, total only

☐ Print all, breakdown

☐ Print charged, total only

☐ Print charged, breakdown

of Copies

1

Print Bar Code On Receipt (Epson Receipt Printers)

☒

Print Extra Copy of On Account Receipts

☐

Suppress Extra Signature Copy

☒

Print Notes on CC Receipt

☐

Print Dept Notes Receipt

☐

Print Item count on Receipt

☐

Print Second Description on Full Size Professional

☐

Validate Checks

☐

Combine Lines on Receipt

☒

Scale Update Exit

Below are some of the most commonly used receipt options.

Option	Description
Receipt Size	The 'Short Receipt' selection prints a more compact, nicer looking receipt and is recommended for restaurants
Print Invoices	Set this to 'Yes' to print a receipt for every check, 'No' to never print receipts or 'Prompt' to ask you every sale if you'd like a receipt
Suppress Extra Signature Copy	Many quick service restaurants do not require a signed copy of the receipt. Turn on this option to suppress the signature copy.
Print Modifiers on Receipt	Select whether or not you want to list modifiers and their respective prices on the customer receipt
Combine Lines on Receipt	If the same item is ordered more than once on the same check, this option will combine their quantities on one line on the receipt
Company Name	In the 'Company Info' tab, prints on the top of the receipt

BONUS FEATURE: It is also possible to print a logo on the on the top of the receipt using the Dell or Epson printers. The check box for printing the logo is located in the 'Friendly Printers' screen. Your logo must be uploaded to the receipt printer before it can be printed on your receipt. PC America offers a logo upload service during which an engineer will format your logo artwork for the printer and walk you through uploading the logo to the printer. Please contact your PC America sales representative to order this service.

Configuring Restaurant Pro Express

Personalize Colors and Pictures

Many restaurants have a color theme that is consistent throughout your dining establishment. Restaurant Pro Express can be configured to match. The colors of both the login screen and invoice screen are customizable. A picture of your choice can also be placed on the login screen.

The colors and pictures can be configured within the 'Display Setup' screen which can be accessed from the 'Setup' tab of the 'Setup Screen'.

Screen Display Setup

Invoice Screen Options

☒ Toolbar

☒ Customer Display

Select Invoice Screen to Use

☒ Modern

☐ Traditional

☐ Split Invoicing

Set Form's Background Color >>

Login Screen Options

Display Type ☒ Numeric ☐ Alphanumeric

Background Color

Foreground Color

Select Picture \ Logo

Update Cancel

To change the background color of the 'Invoice Screen', click the 'Set Forms Background Color >>' button and select the color from the color template that pops up on your screen. Similar buttons are used to select the colors and picture of the 'Login Screen.'

Configuring Restaurant Pro Express

Credit Card Processing

Restaurant Pro Express includes built-in credit card processing with the ability to process credit cards over the internet in as little as 2-3 seconds. Credit cards are sent securely to CoPay, CoCard's internet gateway, for authorization. The use of integrated credit and debit card processing requires:



- A merchant account through CoCard Merchant Services. Application approval and fees apply. To apply for an account please contact CoCard at 1-800-317-1819 or by e-mailing info@cocard.info.
- A high speed internet connection (cable modem, DSL, T1 or other) with a speed of at least 128kbs. Please contact a PC America Sales Representative for a recommendation of who to use for your local internet connection as well as a virtual private network.
- The use of an internet router with dialup backup is highly recommended. A router will help protect you from electronic intrusions from others on the internet and the dialup backup will ensure you can continue to process credit cards even if your high speed internet connection is down.

CoCard will provide you with a **User Name** and **Password** which must be inputted in the **Credit and Debit** tab of the **Setup Screen** of **Restaurant Pro Express**.

Your CoCard User Name and Password merchant number and other credit card account information must be entered into the 'Credit and Debit' tab of the 'Setup Screen' inside of Restaurant Pro Express.

For instructions on configuring an existing third party merchant account with Restaurant Pro Express, please contact the PC Sales Department at 1-800-PC-AMERICA (1-800-722-6374) or sales@pcamerica.com. The use of a third party merchant account will require the purchase and configuration of an additional third party credit card module provided by PC America.

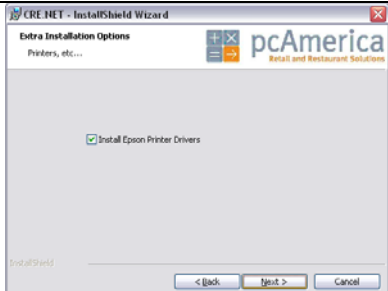

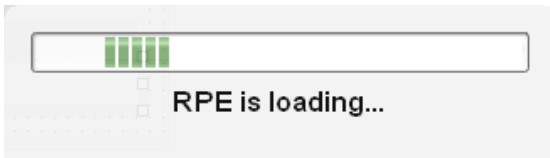
Configuring Restaurant Pro Express

Configuring Multiple Stations

It is fairly easy to configure multiple stations in **Restaurant Pro Express**. Before configuring RPE, ensure your Windows computer network is properly installed. If you need over-the-phone help to assess and configure a computer network, please contact your sales representative. If your network is properly configured, please follow the steps below.

Restaurant Pro Express is a redundant multi-user software package. A change made on one station will be shared amongst all stations in real time. In addition, the data is copied to each server – if the server goes down, the individual stations will continue to function independently.

It is very important to install your RPE Server first before installing additional workstations.

	<p>1. When installing RPE on your server, make sure the RPE Server application is installed first on your server computer. The installation of RPE Server is documented in Step 2 of the 10 Steps to Getting Started in the beginning of this manual.</p>
	<p>2. Install Restaurant Pro Express on the second station. When starting Restaurant Pro Express, in the Database Selection in the startup wizard, select Connect to My Server. Restaurant Pro Express will automatically detect your database over the network. If for some reason this automatic detection fails you will be prompted to manually select the database.</p>
	<p>3. There will be a brief wait while Restaurant Pro Express communicates with the server, downloads a copy of the data and starts for the first time on this station. This may take a number of minutes; however it is a fully automatic process.</p>

Configuring Restaurant Pro Express

Configuring Multiple Menus

Restaurant Pro Express allows you to configure multiple menus that can be set to automatically turn on or off at certain times on certain days. For example, a sit-down restaurant might have their lunch menu on the screen from 1-4 pm and then at 4:01 pm the POS would automatically switch to their dinner menu. This feature also allows for special items to appear at specific days or times. For instance, a steak house might have a weekend menu with higher end items that are only offered Friday, Saturday and Sunday. Alternatively, many cafeterias change their menu daily on a 30 day rotation. Another use is a holiday menu such as a Valentines Day menu.

Multiple menus and menu schedules are set up in the **Touch Screen Configuration** screen which is accessible from the **Setup** tab of the **Setup Screen**. Touch the **Configure Schedules** button to enter this screen.


Day	Time
Sunday	
Monday	
Tuesday	12:00 AM-11:59 PM
Wednesday	
Thursday	
Friday	
Saturday	

The **Menu Schedule Configuration** screen is used to setup your multiple menus. To create a new menu, touch the **Add** button. The **Add Time** and **Delete Time** buttons are used to specify which times the menu is active. The check box titled **This is a special event or holiday menu** is used to specify that the menu takes precedence over other menus scheduled during the same time.

Multiple menus automatically display on the **Restaurant Invoice Screen** at their scheduled time. You can manually select an alternate menu at any time by touching the **Select Menu** from the **Edits** screen. For example, breakfast may end at 10:30 AM but a server may wish to place a breakfast order for someone that places their order at 10:34 AM.

Configuring Restaurant Pro Express

Laying Out Your Tables for Fine Dining and Table Service



The table service features of Restaurant Pro Express include the ability to visually lay out your tables on the screen. Your tables can be arranged by section (ex: bar, patio, dining, etc.) and can be dragged and dropped to allow for easy arrangement. Sections colors are customizable to match the look of your restaurant and to provide easy association for your servers.

In order to use the table service features of Restaurant Pro Express, the **Prompt Table** checkbox must be turned on in the **Restaurant Features** tab of the **Setup Screen**.

To modify the layout of your tables touch the **Edit Layout** button and enter the administrator password. At this point you are now in edit mode.



Before you can add tables to your table layout you must first create a section using the **Add Section** button. Inside of a section you can use the three **Add Table** buttons (circle, square and rectangle) to create tables of different shapes. Each table will require the entry of a table number. If you touch your new table you'll see a few properties you can set for this table.

Table Number	Number of Seats	Cost Center	Table Size			
34	<input type="text" value="0"/>	<input type="text" value="NONE"/>	<input type="button" value="◀"/>	<input type="button" value="▶"/>	<input type="button" value="▼"/>	<input type="button" value="▲"/>

Number of Seats should only be used if you want to select the actual seats that the guests are sitting at and is NOT recommended for most restaurants. **Cost Center** (choices can be configured in the **Setup Screen**) is helpful in tracking which seating areas in your restaurant generate the most income. The **Table Size** arrows can be used to resize your table to be smaller or larger.

The table layout features also include the ability to create objects (circle, square and rectangle) which are used to represent landmarks, obstacles or details of your restaurant and help your servers pick the correct table. A few examples are 'Bar', 'Plant' and 'Coat Check'. Objects can have their own customizable color and captions.

Quick service and fast food restaurants increase throughput, customer satisfaction and overall profits by streamlining their operations to be as efficient as possible. Reducing transaction time by a few seconds can have substantial results. Restaurant Pro Express is designed to provide the fastest checkout possible. Below are a few tips on how to speed up the order taking and payment of every check.

- **Swipe-and-go** credit card processing. In order to pay by credit card, most point of sale systems require touching a **PAY** or **TENDER** button and then the selection of the **CREDIT CARD** tender type. RPE is easier and fast; simply swipe the credit card on the menu screen. As soon as the card is swiped RPE will process the card. Eliminating these two button presses shaves a few valuable seconds off every credit card sale.
- **Gift card swipe-and-go** functionality provides the same speed savings if using Restaurant Pro Express's built-in gift card processing.
- **Quick Tender** button (configured in the **Quick Invoicing and Alerts** tab of the **Setup Screen**) turn on quick pay buttons for cash; this will turn on \$ 5, \$ 10, \$ 20, \$ 50 and \$ 100 fast payment buttons for speedy cash payment.
- The **customizable buttons** on the bottom of the invoice screen can be used to dramatically increase the speed of order taking. The buttons should be configured to be the best selling items or most used modifiers in your restaurant, eliminating the need to first select the department. For example, one of the best sellers in a pizza shop will be a plain slice of pizza; a fixed pizza slice button on the bottom of the screen helps save one to two seconds every time that item is ordered.
- **Secure Login Cards** are a fast and secure way to log servers into the system. Typing an ID and password (or a PIN code) takes a couple of seconds longer than swiping a card.

Configuring Restaurant Pro Express

Configuring and Tracking your Drivers for Delivery

You can configure your employees to be drivers for restaurants that deliver food. In order to do this, you must configure the Job Code of your employee to be part of the delivery tracking system.

To initiate a delivery, select the **Delivery** tab from the **Table Selection** screen. Restaurant Pro Express will prompt you to select the customer to which this order will be delivered.

ManagerHelpExit

Orders

SortFilterTime OrderedTime PromisedWaiting for PreparationWaiting for AssignmentWaiting for PickupOut for Delivery

Time Ordered	Time Promised	First Name	Last Name	Address	City	State
7:16:58 PM	8:16:00 PM	CARLOS	RAMIREZ	21 WILLOW STREET	MERRISTOWN	Assigned to Drive
7:17:22 PM	8:17:00 PM	MIKE		CONVENT SHEL	CONVENT STATION	Waiting for Assignme
7:17:52 PM	8:17:00 PM	JJ	Dunn	52 Speedwell Ave	Middletown	Assigned to Drive

View OrderAuto-Assign DriverManually Assign DriverChange Order StateEnter Names to Filter betweenStart TimeEnd TimeScroll UpScroll Down

Drivers

SortFilterLongest AvailableCooked inOut on Delivery

State	Name	Time Available
Order Assigned	Jimmy	11:17:53
Cooked in	Simon	10:10:19

DispatchBackScroll UpScroll Down

Deliveries for Jimmy

First Name	Last Name	Address
CARLOS	RAMIREZ	21 WILLOW STREET
JJ	Dunn	52 Speedwell Ave

Clear Selected OrderClear All OrdersScroll UpScroll Down

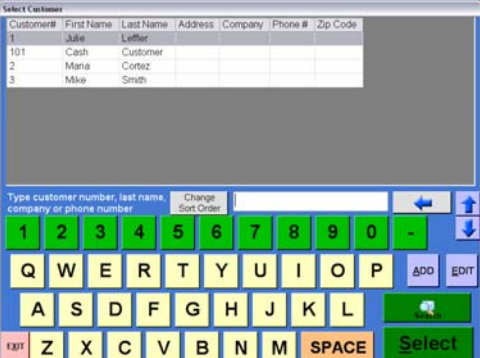

After the customer is selected, ring up the items for the customer in the same fashion you would place any other order. When you are finished with the order, touch the **SEND** button to send the items to the kitchen. Restaurant Pro Express will ask you for the **Time Promised**, which is the time that the customer is told to expect delivery.

To assign drivers to certain orders, and to track all of your deliveries, touch the **Delivery Tracking** button in the **Delivery** tab of the **Table Selection** screen. The delivery screen (represented above) allows you to assign drivers to orders, record which orders are out for delivery, dispatch drivers and record when they arrive back in the restaurant.

Common Restaurant Functions
Select a Customer

Selecting a Customer for the Invoice

Customer tracking is a very valuable function of Restaurant Pro Express. The ‘Tracking Your Customers’ section of this manual (and the built-in F1 Help Section) describes how to add and modify customers and loyalty plans. To actually select the customer for the invoice, follow these steps.

<div style="border: 1px solid black; padding: 10px; text-align: center;"> Lookup Customer </div>	<p>Touch the ‘Lookup Customer’ button in the bottom right corner of the invoice screen. This will bring up the ‘Customer Lookup.’</p>
	<p>The customer search screen is an easy screen that allows you to search by first name, last name, customer number, phone number and company name. You don’t have to select which criteria you are searching on – you can simply type the information and it will search all fields.</p>
	<p>After you find the customer, touch the line that has their record and touch the ‘Select’ button to select them for the invoice. The selected customer’s name and bonus activity will appear to the right of the department scroll buttons.</p>



The fastest way to select a customer is to swipe their loyalty card at any time in the invoice screen. In addition to fast customer selection, loyalty cards are a physical reminder of your business. Please contact the PC America Sales Department to purchase customized loyalty cards with your logo.

All items sold to the selected customer will appear in that customer’s sales history in the reporting screen and the Customer Sales History report.

Common Restaurant Functions
Voids, Comps and Discounts



Restaurants often need to modify an order for a variety of different reasons. RPE provides void, comp and discount functions that are logged upon their use along with a reason code of why the server modified the check. Reason codes can be configured by navigating to the **Invoice Settings** tab of the **Setup Screen**, touching the **Reason Codes** button, selecting the **Reason Code Type** button at the bottom

Voids, comps and discounts are all permission based functions that can be set to be accessible for managers only. These permissions are configured in the **Employee Maintenance** screen (please see the **Tracking Your Employees** section for further details.)

A server can use the **Void Item** button to indicate that an item was mistakenly ordered. First select the items you want to void, then hit the **Edits** button and finally touch the **Void Item** button. This function should only be used if the item has not yet been cooked and therefore the item and it's ingredients will not be deducted from stock.

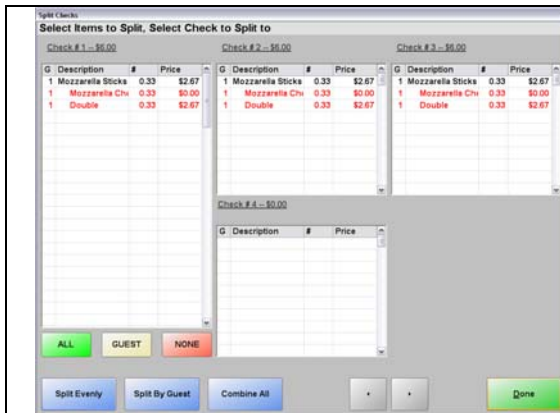
Servers will **Comp** an item for a variety of reasons. A comped item is given away at no charge. A few examples of why a server would comp an item include giving a free appetizer to a regular customer, the guest had to wait a long time for their seat or even the rare situation where a customer did not like their food. To comp an item, select the items you would like to comp and touch the **Edits** button followed by the **Comp** button. Select the reason code for the comp and the item will be changed to a zero price.

Touch the **Discount** button to discount individual items on the check. The user will have a choice of discounting specific items or all the items on the check within a specific category (for example a discount on all drinks.) Next the user will be prompted for a discount percentage and the reason code for the discount.

Voids, comps and discounts will all show on the bottom of the invoice grid. To remove one of these edits, select the void, comp or discount on the invoice grid and touch the **Undo Edit** button.

Common Restaurant Functions

Splitting a Check



It is very common for guests in a restaurant to ask for separate checks. Checks are separated in Restaurant Pro Express by using the **Split Check** function found inside of the **Edits** screen. Once a check is split, you can touch the **Done** button to print checks or close out the transaction; to recombine the splits into one check by choosing the **Combine All** button.



There are three ways to split a check:

The **Split Evenly** button will prompt you how many checks you want and split evenly that many times. For example a \$ 10 check split four ways will create four splits for \$ 2.50 apiece. This is a fast way to get two or more equal checks where the party decides to 'split it down the middle'.

Split by Guest will create separate checks for each guest based on what they ordered. This button is only available if you are using the **Order by Guest** feature that is used to specify which guest is ordering each item. This is a one touch split operation that charges customers based on what they ordered.

The third way to split checks is the **Touch and Drop** method which is a more manual method that provides the greatest flexibility. Touch an item on the main check (or any of the splits) and then drop it onto any one of the splits by touching the split you would like to place it on.

The individual splits of the check will have the same invoice number as the original check, however there is a split number printed on each check.

After a check is split, each split can be individually closed out. You can close out some of the splits while the remainder of the party continues to dine and order more items.

Common Restaurant Functions

Transfer Tables and Combine Checks

Restaurant Pro Express has built-in features for the instance where a party moves from one table to another (ex: party moves to a table in a warmer area of the restaurant, or a guest may transfer their check from the bar to a table when they are seated.) Checks can also be combined in the instance that two separate parties decide to dine together under one check. The Transfer and Combine features are only used inside of table service restaurants.

TRANSFER \ COMBINE

To transfer or combine a check, touch the **TRANSFER\COMBINE** button inside of the **EDITS** screen. Select the table to with and the two checks will be combined into one check.

NOTE: By default, if you combine two checks they will merge into the table you chose first before using the **COMBINE** feature. You can configure RPE to combine into the destination table instead of the source. This setting is called **Combine Checks** and is located in the **Restaurant Features** tab of the **Setup Screen**

TRANSFER SERVER

A server can also opt to transfer a check from them self to another server. The use of this feature requires the other server to accept the table transfer (if the permissions are configured for this.)



Common Restaurant Functions
Adding a Tip

Tips are applied in a variety of fashions listed from the most common to the least common below:

Credit card tips added after the fact: The majority of checks closed to credit card have a tip applied after the fact. These tips can be applied in three ways:

- **Recommended:** For table service restaurants, turn on the **Keep Check Open Until Tip Applied** option. The table will turn yellow after the check is closed to credit card; touch the yellow table to add a tip to that check.
- Tips may also be added using the **Add Tip** button in the **Credit Card Settlement** screen (accessible from the **Administrative** tab of the **Setup Screen**.) This is usually used in restaurants where a manager enters all the tips on behalf of the server.
- Upon clock-out, RPE will prompt the server for a tip for any checks paid by credit card that have not yet had a tip applied.

Auto tipping for sales over a certain party size: Many restaurants automatically apply a gratuity percentage over a specific party size. This functionality can be configured inside of the **Restaurant Features \ Tips** tab of the **Setup Screen**.

Manual Applied Gratuity: Tips can be manually applied to a check by using the **Apply Gratuity** button inside of the **Edits** menu. This should only be used in the rare case where a tip needs to be applied and the above two methods are not applicable. Manually applied tips are more difficult to account for, in part because servers rarely report cash tips.

Most forms of tips inside of Restaurant Pro Express are displayed inside of the **Shift Report** as well as various other reports inside of the **Reporting Screen**.

Common Restaurant Functions

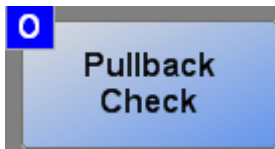
Void a Check \ Pullback a Check

Checks can be voided before they are paid for and closed out. They can also be voided **AFTER** being paid for as long as it is within the same day by pulling back the check.



To void a check before it has been paid simply touch the **VOID INVOICE** button inside of the **Edits** screen. This permission based function will save the invoice as a voided invoice with the next invoice number in sequence. The voided invoice totals will not be included in the sales totals.

A check may be re-opened after it is closed out as long as the day hasn't yet been closed out. After the check is re-opened you can either void the check (by using the **VOID INVOICE** button as described above) or you may modify it and re-close it to another form of tender.



To re-open a check, use the **Pullback Check** button inside of the **Options Screen**. RPE will ask you which server committed the check you would like to pullback followed by a listing of invoice numbers closed out by the selected cashier. After the check is reopened it is as if it was never closed out.

TIP: A few of the reports inside of the **Reporting Screen** can be generated for voided invoices. It is good practice to run these reports on a regular basis as post voiding of checks opens up opportunity for theft. There are valid uses of the void function; an audit trail is kept to protect against theft in such a fashion.

TIP: It is recommended that you use the **Tie Pullbacks to Time Clock** feature (which can be turned on inside of the **Setup Screen**) in order to prevent employees from pulling back checks that were from a previous shift.

Common Restaurant Functions

Sell and Redeem Gift Cards and Stored Value Cards

Gift Card

Gift cards and stored value cards are tracked inside of Restaurant Pro Express with no transaction fees. They can be sold for any value. In order to sell a gift card you must first configure one of your custom buttons for the **Sell Gift Card** feature. After this is configured, all you need to do to sell a gift card is touch the **Gift Card** button, swipe the new card and enter the dollar amount you wish to sell the gift card for. A gift card does not become active until the transaction is fully paid for and completed.

The screenshot shows the 'Payment Information - Split 2' screen. At the top, it says 'Type Tender Amount & Select Tender Type'. Below this, a numeric keypad is visible with the amount '\$6.00' entered. To the right of the keypad, there is a section for 'Amount Remaining' showing '\$6.00' and a 'Paid So Far' section with a table. The table has columns for 'Type', 'Amount', and 'Details'. Below the keypad, there are buttons for 'Cash', 'Credit', 'Check', 'Gift Card', and 'On Account'. At the bottom, there are five green buttons with values: '\$ 5.00', '\$ 10.00', '\$ 20.00', '\$ 50.00', and '\$ 100.00'. There are also 'Cancel' and 'Done' buttons.

To pay by gift card, simply choose the **Gift Card** button from the **Payment Screen**.

You do not need to enter the amount tendered as Restaurant Pro Express will automatically calculate the most desirable amount. A box will pop up asking you to swipe the gift card; swipe the card and RPE will deduct the proper amount from the gift card. If the gift card balance is more than the total amount due then RPE will deduct the amount from the gift card. If the balance is less, RPE will exhaust the balance on the gift card and display the new amount remaining to be paid by another form of tender.

SPEED TIP: If the gift card will be the only form of tender for the transaction (which is prevalent in quick service and also happens often in table service), you can swipe the gift card at any time from the **Restaurant Invoice Screen**. This will automatically deduct the amount from the gift card and end the transaction.

NOTE TO FRANCHISEES: The internal gift card system is ideal for single unit restaurants or for multi unit restaurants owned by the same owner. Many franchise restaurants have separate accounts and will the money from gift cards automatically transferred from one account to another, which requires the use of a third party gift card processor. Depending on the third party gift card merchant provider, this may or may not be possible directly inside Restaurant Pro Express. Please contact PC America for further assistance.

Common Restaurant Functions

Clocking Out and Closing Out a Day



There are two steps to closing out a day in a restaurant. The first step is every server should **Clock Out** of Restaurant Pro Express. Servers can clock out by touching the clock out button on the **Login Screen**. They will be prompted to close out all tables, enter all credit card tips and, if configured, enter their closing cash amount for the day. A **Shift Report** will print out for the server providing important end of shift information as well as an over\short amount if they are carrying their own cash bank.

After each server is clocked out, the manager of the restaurant should run the **End of Day** function within Restaurant Pro Express. The **End of Day** will scan all the checks for the day and ensure that all of the tables are closed out, that there was a tip entered for every credit card sale and that all of your servers are clocked out of the system.

Expected Cash: \$12.60
Enter Actual: \$12.60

7	8	9
4	5	6
1	2	3
.	0	+/-

Clear Cancel

OK

Restaurant Pro Express will prompt the manager for the amount of cash at the end of the day. This cash figure is a total for all server shifts from the current restaurant shift. The restaurant over\short amount will be printed in the **Daily Close** report as well as other vital information detailing the activities at the restaurant for that day. This report can be re-printed in the future from within the **Reporting Screen**.

The **End of Day** function is subject to the **Perform End of Day** permission in the **Reporting** tab of the **Employee Maintenance** screen. Please see the **Tracking Your Employees** section for an explanation of how to configure permissions.

Tracking Your Customers

Customer Maintenance Screen

The 'Customer Maintenance' screen is used to add and update your customers. One customer is displayed at a time. Detailed information is stored in the tabs across the top of the screen. This screen is fully touch screen compatible, meaning you can double touch any field (or touch the field and then the keyboard button) to bring up an on screen keyboard.

Each customer within Restaurant Pro Express must have a unique customer number. It is to use the phone number as the customer number, as this provides a fast and easy way to look up a customer if they forget their membership card.

Loyalty and membership cards are easy to assign to a customer. Below the 'Card Swipe IDs' label, touch the 'Add' button and swipe or scan the loyalty card.

The 'General Info' tab stores basic information such as name and address. 'Extended Info' has more, less commonly used information. Information regarding accounts receivable is stored in the 'Account Info' tab. Optional 'Ship To' and 'Bill To' addresses are stored in the 'Shipping\Billing' tab, followed by the 'History' tab which stores a detailed purchase history for the current customer. The 'Notes' tab has an open notes section. Custom configured 'Properties' can be established and populated to prevent certain customer from buying specific items (i.e. to avoid a customer buying food they are allergic to.)

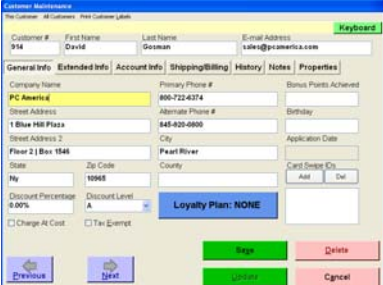
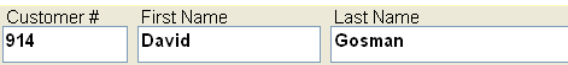
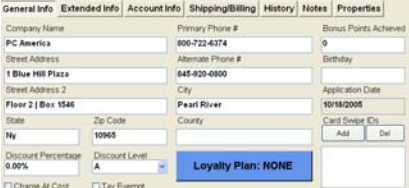
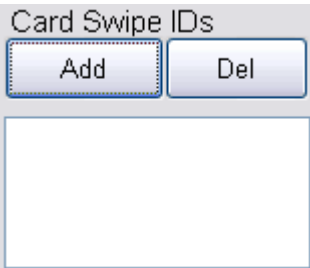

Track Your Customers

Remember, your customers are the most essential part of your business. You purchased a point of sale system that provides several great tools to track your customers and get them back into your restaurant. You have the tools – now use them!

- Enter their name, address, phone e-mail address and other information
- Run reports to see who your best customers are; perhaps once a year you should have a special flat price meal for your best customers where you spoil them with free dessert and extra service.
- Configure customer loyalty plans to reward your loyal customers
- Send mass e-mails with news and specials about your business
- Remember your customers and they will remember you

Tracking Your Customers
Adding and Modifying Customers

Adding customers in Restaurant Pro Express is easy. Use the ‘Customer Maintenance’ screen to add our customers; this screen can be accessed in the ‘Administrative’ tab of the ‘Options Screen.’

	<p>1. Inside of the ‘Customer Maintenance’ screen, touch the ‘Add’ button on the bottom of the screen. This will set the screen to add mode, during which RPE is waiting for you to enter the information for the new customer.</p>
	<p>2. Fill in the information on the top; a unique customer # as well as the customer’s first and last name is required. An e-mail address is highly recommended.</p>
	<p>3. Optionally, fill in other pieces of information such as the phone number, name, company, etc.</p>
	<p>4. Optionally, to assign a loyalty card to a customer, click or touch the ‘Add’ button and swipe the loyalty card through your magnetic stripe reader. Loyalty cards are a great way to increase repeat business. You can order customized loyalty cards with your logo from PC America.</p>
	<p>5. Click the ‘Save’ button to save the new customer in the database.</p>

Modifying customers is just as easy. First search for the customer you want to modify (using the Look Up button on the bottom left corner of the screen.) Make your changes to the customer record and click or touch ‘Update’ at the bottom to save the updated information.

Accounts Receivable

Restaurant Pro Express gives you the ability to open accounts for your customer, charge on account and send statements out at a later point in time. These features, as well as the ability to make payments and credit balance are part of the built-in Accounts Receivable system. To open an account for a customer, find the customer inside of 'Customer Maintenance' and touch the 'O' button in the 'Account Info' tab (and save the changes.) Touch the 'Detailed Account Info' button next to it to access the payment and credit screen, where you can apply payments to open balance and print customer statements.

Customer Loyalty

Offering incentives and bonuses to your customers is a great way to earn their loyalty and bring them back to your restaurant many times in the future. Some great examples are a local steak restaurant that offers free dinner on your birthday and also mails coupons with discounts based on how many times you visit – people continue to dine there to earn their points. The coffee shop downstairs from the PC America office earns the majority of the coffee business in the building by offering a buy 9 get the 10th free coffee special. Many restaurants offer \$ 2 off your meal if you dine within a week of your last visit. These, and more, are part of the loyalty features built into Restaurant Pro Express.



Most restaurants that offer loyalty plans will give out a loyalty card that the customer carries as a physical reminder of the restaurant. They swipe their card at time of sale in order to earn their loyalty points for the order. Customized loyalty cards are available from PC America and may be assigned to customers inside of Restaurant Pro Express.

It's easy to set up customer loyalty inside of Restaurant Pro Express. In the 'Options Screen', select the 'Customer Loyalty' function. You must create both 'Loyalty Incentives' and 'Loyalty Plans.' Incentives are the actual rewards you give to your customers, such as a free meal or \$ 2 off the next purchase. Plans consist of one or more incentives. After you have created a loyalty plan, you can assign it to a customer by touching the 'Loyalty Plan' button in the customer's record in 'Customer Maintenance.'

The F1 Help Section includes a full description and tutorial for configuring loyalty incentives, plans and assigning them to customers.

Menu Items, Recipes and Your Inventory

Inventory Maintenance – Adding and Modifying Items

The screenshot shows the 'Inventory Maintenance' window for 'Mozzarella Sticks'. It includes fields for 'Item Type' (Standard), 'Cost' (\$2.17), 'Price you charge' (\$6.95), and '# in Stock' (27). There are tabs for 'Optional Info', 'Sales History', 'Matrix', 'Recipe', 'Special Pricing', and 'Ordering Info'. A table lists ingredients: Mozzarella Cheese (0.75, 15.000%, \$0.147), Breadcrumbs (0.07, 20.000%, \$0.021), and Marinara Sauce (0.5, 5.000%, \$0.063). At the bottom, there are buttons for 'Previous', 'Look up', 'Next', 'Add', 'Save Changes', 'Duplicate', 'Delete', and 'Exit'.

Restaurant Pro Express allows you to create menu items with modifiers, create recipes, track ingredients and configure retail and other inventory items. Creation and modification of these inventory items, as well as modifier groups and coupons, is done through the 'Inventory Maintenance' screen which can be accessed from the 'Administrative' section of the 'Options Screen.' **A full tutorial of this screen is in the built-in F1 help section;** below are some basic pointers to get you started.

You can add standard items and modifiers from the menu screen or from the inventory maintenance screen. Adding them through the Inventory Maintenance screen gives you more options and flexibility. Click on the 'Add' button to add a new item. You'll have a choice of four different types of items:

- **'Standard Item'** encompasses all menu items, modifiers and SKU based retail items
- A **'Choice Item'** is not a real item, but rather it is a fake item that when "sold", gives you a choice of which item to sell. For example, you can create a Latte choice item whose choices would be Small Latte, Medium Latte and Large Latte. The advantage is one menu button that drills down into choices, as opposed to an overwhelming number of menu buttons.
- The **'Modifier Group'** is used to group modifiers together. For example, if you have modifier items 'Rare', 'Medium Rare', 'Medium' and 'Well Done', you can group them into one modifier group called 'Meat Temperatures.' Using modifier groups simplifies creation of menu items; instead of adding four modifiers to many meat entrees, you can add the group once to each item.
- **'Coupon'** items are created to give the customer a discount. They can be configured to give a flat amount or percentage off an entire check or only specific items. Coupons automatically calculate the discount amount based on price paid, date and time and other options.

Fill in the data for the item and click 'Save.' The most important fields for a standard item are the item number (must be unique), description, cost, price and tax rates. Modifying an item is just as easy. Find the item in our list by using the 'Lookup' button on the bottom left; modify the item and touch 'Save Changes' to update the item.

Special pricing is an extremely powerful feature of Restaurant Pro Express. A variety of sale and promotional pricing can be configured at any time; these prices will automatically be used when the server rings in the items. For example, happy hour pricing on drinks and bar items can be pre-configured; during happy hour the happy hour price will automatically be used without the servers having to apply a discount.

There are three main types of special pricing:

Sale Pricing: This function allows you to place an item on sale between certain dates. To create sale pricing for an item, click on the **Add** button in the **Special Pricing** tab. Enter the percent of the sale mark down and select the start and end dates for the promotion. To remove a sale price for an item, select the desired sale price then click on Remove. To place an item on sale for only one day, select the same day for both starting and ending date.

Example: All steak dishes 10% off next week

Bulk Pricing is used to sell items at a reduced price when your customers buy more than one of an item. To set up a bulk price for an item, click on Add, enter the quantity needed to be purchased for bulk pricing, and then enter the new price. To remove a bulk price for an item, select the desired bulk price then click on Remove.

Example: Two apple pies for the price of one

Time-Based Pricing allows you to offer alternate prices on certain days within certain time ranges and is most commonly used for happy hours. Restaurants often use time based pricing to attract customers during their non-busy hours. To enter time-based price for an item, click on Add, select the day on which you want to offer the sale price, and then enter the start and end times. To remove a time-based price for an item, select the desired price then click on Remove.

Example: A bar may offer a beer during happy hour on Fridays from 4PM to 6PM for a sale price of \$2.00 while the normal price is \$4.00.

TIP: If happy hour is 4 PM to 6 PM, start your time-based price at 3:50 PM and end it at 6:10 PM. You may sell a few extra discounted drinks, but you will also avoid annoying a customer who orders a beer at 6:02 PM and wants the discount.

Restaurants can carry anywhere from a few dozen items to hundreds of items and more. Regardless of how many inventory and menu items your business sells, it is useful to break your items down into smaller groups of items to perform a certain task or search. In Restaurant Pro Express, items can be grouped into Departments. Departments can be further grouped into Categories.

A few examples of departments are Appetizers, Entrees and Wines. Common choices for categories are Food and Drinks, the top most breakdowns to see which area of the restaurant is bringing in the most profit.

Please note that Restaurant Pro Express comes with a default department of **NONE**. This department can not be deleted.

The **Department Maintenance** screen can also be used to set up employee departments, which allows you to group your employees in different ways for functions such as labor scheduling. See the 'Department Type' description below for more details.

You can access the **Department Maintenance** from the **Administrative** tab of the **Options Screen**.

To add a department:

1. Enter the 'Department Maintenance' screen
2. Click or touch the 'Add' button
3. Type in a Department in the corresponding box (ex: VEGGIES)
4. Click or touch the 'Department Description' box (ex: Vegetables)
5. Type in a description for your new department
6. Select a category and department type (or leave these as is)
7. Click the 'Save' button

Optionally you can check the **Bar Tax Inclusive** check box which includes tax built into certain items if they are ordered and immediately paid for at a bar station. This provides for a fast cash transaction where the tax is built into the price for an even round number.

Categories are configured in the **Category Maintenance** screen which is accessible in the button below the **Department Maintenance** screen. Adding a category is nearly identical to adding a department.


Menu Items, Recipes and Your Inventory


Recipes and Ingredient Tracking

Restaurant Pro Express allows you to configure a separate recipe for each item. Recipes provides a useful reference for restaurant employees for assistance in preparing the item and also as a reference for allergies in the case that a customer asks if a menu item contains a specific ingredient that they are allergic to.

Recipes can be configured in the **Recipe** tab of the **Inventory Maintenance** screen. To create a recipe, first add each ingredient as a separate standard inventory item with both an in stock value and a cost (examples: chicken breast, portabella mushroom). Then, after creating your main menu item (example: Chicken Portabella), navigate to the **Recipe** tab, touch the **Add Ingredient** button and choose your individual ingredients off the list. RPE will ask for both a quantity (the amount of that ingredient used in the recipe) and a yield (which is used to factor in waste and improper measurement.)

Optional Info	Printers	Sales History	Matrix	Recipe	Special Pricing
Ordering Info	Price Levels	Modifiers	Notes	Properties	Pending Orders


Add Ingredient


Remove

An item's ingredients will be deducted from stock when it's sold

Ingredient	Amount	Yield	Cost
Chicken Breast	0.3	5.000%	\$1.172
Portabella Mushroom	0.1	15.000%	\$0.066

To track ingredients, turn on the **Deduct Ingredients** option in the **Inventory** tab of the **Setup Screen**. This option has three settings:

- The **Never** option disables ingredient tracking
- **At End of Sale** deducts the ingredient stock when the item is sold and the
- **At Preparation** menu allows you to deduct ingredients when you first make the item.

In the **Restaurant** tab of the **Reporting Screen**, run the **Ingredients – Theoretical Usage** report to view a list of all ingredients that should have been used based on the sales recorded within the selected date range. You can compare this list to your actual ingredients to determine if any food has been wasted or stolen.

Tip: Use the **Ingredients – Theoretical Usage** report for last weekend to see what items you need to have in stock this weekend. If you only used four dozen eggs during Sunday morning brunch, this report will help save you from purchasing 6 dozen for this Sunday.

Menu Items, Recipes and Your Inventory

Modifiers

Modifiers are items that alter the menu item they are modifying. For example, Rare, Medium and Well Done would be modifiers for a steak. French, Italian and House dressings would be modifiers for a salad. Assorted toppings would be a modifier for pizzas. Modifiers are added into **Restaurant Pro Express** in the same fashion that a standard menu item would be created, however the **Modifier Item** checkbox in the **Optional Info** tab should be checked off.

Modifiers may also be grouped together into **Modifier Groups**, which is a big time-saver when creating your menu items. To create a Modifier Group, first create the individual modifier items. Next, add an item and choose the **Modifier Group** item type. Finally, touch the **Add Modifier** button to add a modifier to the group. You can add as many modifiers as you'd like to a group.

The next step is to **ASSIGN** modifiers (or modifier groups) to an item. To do this, go to your menu item (or create a new menu item) and navigate to the **Modifiers** tab. There are two options on the top of this tab (under the label **Modifier List**.)

Add Modifier Group adds the modifier groups created using the explanation above. Modifier groups are more functional than the below option, allowing you to customize a few properties related to adding the modifier group to the selected menu item:

- The **Prompt** field allows you to enter the question the user is asked when selecting this modifier (ex: What temperature?)
- **Charge for Modifiers** is checked if you want to charge for the modifiers in this group when applied to the current item (ex: you may charge for ice cream toppings on a standard cone but not when applied to a Sunday)
- **Forced?** Indicates whether the server **MUST** choose a modifier. It is a good idea to force modifiers such as meat temperature for a steak, where the chef always needs to know the selection. Modifiers such as **Toppings** on a pizza don't need to be force as the customer may purchase a plain pizza without toppings.
- **# To Select** indicates whether the cashier must choose one, two or three modifiers, or if there is a maximum number of modifiers.

Add Individual Modifiers is used if you do not want to create a group for the modifiers for this item. This method is less efficient than modifier groups, however it is useful for lists of modifiers that are not repeated for other items. If you reuse the same list of modifiers more than once, you should create a modifier group to save you time.

Menu Items, Recipes and Your Inventory

Choice Items

Inventory Maintenance

General Information for CAPPUCINO

Department for this Item: ESPRESSOS Item Type: Choice

Item Number: CAPPUCINOP

Description: CAPPUCINO

Prompt: WHAT SIZE?

Click to Select Picture

Choice Items:

Item Number	Description	Quantity
Capp12	Cappuccino 12 oz	1
Capp166	Cappuccino 16 oz	1
Capp20	Cappuccino 20 oz	1

A choice item isn't an actual item. When you 'sell' a choice item, it will let you choose the item to sell off the above list.

Search by Item Number

Profit%: 123.75 % Retail Discount: 0 % Gross Margin: 55.307 %

Buttons: Previous, Look up, Next, Add, Save Changes, Duplicate, Delete, Exit, Transfer, Instant PO

A **Choice Item** is not a real item, but rather provides a way to have the user choose from a list of actual menu items. For example, if you have a coffee shop that sells a small **Cappuccino 12 oz.**, medium **Cappuccino 16 oz.** and large **Cappuccino 20 oz.**, you can create a choice item called cappuccino. When you sell this choice item, you will be prompted to choose which of the three sizes of cappuccino is being sold. This simplifies your menu – you can replace three buttons for Cappuccino on the screen with one button that drills down into a choice of sizes.

Choice items are primarily used to limit the number of items on the main invoice screen and provide drill downs for quicker, easier selection.

In the example above, the choice item is the 'fake' item called 'Cappuccino'. The items included inside of the pass-along are the 'real' items, the choices that are displayed when you 'sell' the pass-along. In this example, the items would be **Cappuccino 12 oz.**, **Cappuccino 16 oz.**, and **Cappuccino 20 oz.**

Some restaurants and bars may use this for a liquor menu. The person configuring the menu would create all their liquors as standard inventory items, and create an 'S Liquor' **Choice**, with all liquors that start with the letter S inside of it. Instead of scrolling through searching for Smirnoff vodka, the bartender can touch S and see a drill-down with Smirnoff amongst a few other S liquors.

When setting up a **Choice Item** you can include a **Prompt** which is the question that is asked to the server when provided with the individual choices. For the above example, a suitable question would be “What Size Cappuccino?”

Menu Items, Recipes and Your Inventory

Coupon Items

Inventory Maintenance

Enter the information for this item and touch 'Save' to save the item Keyboard

Department for this Item: **Appetizers** Item Type: **Coupon** ☒ Tax 1

Item Number: **SCHOOLDISC** ☐ Flat Amount ☒ Percent ☐ Tax 2

Description: **School Discount** Discount Amount: **-10.00%** ☐ Tax 3

Click to Select Picture

Days Valid Restrictions

☐ Does this coupon expire? Expiration Date:

Valid Days and Times

Day	Time
Sunday	12:00 AM-11:59 PM
Monday	12:00 AM-11:59 PM
Tuesday	12:00 AM-11:59 PM
Wednesday	12:00 AM-11:59 PM
Thursday	12:00 AM-11:59 PM
Friday	12:00 AM-11:59 PM
Saturday	12:00 AM-11:59 PM

Search by Item Number Profit% 0% Retail Discount 0% Gross Margin 0%

Save **Save Changes** **Transfer** **Instant PO**

Previous **Look up** **Next** **Help** **Duplicate** **Delete** **Cancel**

Coupons are commonly used in restaurants. A couple of examples are buying one entrée getting one free on Thursday and 10% off all alcoholic drinks 3 – 5 PM daily. In order to account for the wide variety of types and restrictions of coupons in the restaurant business, the Restaurant Pro Express inventory screen includes an item type just for coupons.

Coupons may be configured to give either a percent or a flat dollar amount off the Grand Total. Redemptions of a coupon appear as a sale of an item for a negative dollar amount. It is a good idea to put all of your coupons in one department for easier reporting.

The discount for coupons are triggered either by adding the coupon to a check, or tying it to a loyalty plan where the customer will get the discount either at award time or every time they are selected as the customer for a check.

The **Days Valid** tab is used to set what days and time the coupon is valid. Use the **Add Time** and **Delete Time** buttons to configure the times. You may also set the expiration date for a coupon date by checking the **Does this coupon expire?** check box and filling in the expiration date.

Rule	Type	Description
Include	Department	Appetizers

Minimum Amount # Days Between Use

Include **Exclude** **Exclusive** **Delete**

The **Restrictions** tab allows you to specify which items, departments or categories are included or excluded in the coupon discount. Coupons can also be made exclusive of specific items; this feature is often used to restrict a check to include only one coupon.

There are a number of other restrictions below the grid including a minimum dollar amount, number of days between use and other restrictions to make your coupons more customizable.

Menu Items, Recipes and Your Inventory
Setting Up SKU Based Retail Items

Restaurant Pro Express allows you to configure, ring up and track the sales of SKU based items with bar codes. You can also track retail items that do not have bar codes. To do this, add a standard item to inventory. Scan (or type) the bar code into the **Item Number** field. The main fields on the top third of the screen should be filled in for every retail item you carry in your restaurant.

General Information for Espresso Roast 1 lb				Keyboard
Department for this Item	Coffee Beans	Item Type	Standard	
Item Number	762111206039	Cost	\$4.00	<input checked="" type="checkbox"/> Tax 1 <input type="checkbox"/> Bar Tax
Description	Espresso Roast 1 lb	Price you charge	\$8.95	<input type="checkbox"/> Tax 2
		# In Stock	12	<input type="checkbox"/> Tax 3
Click to Select Picture				

It is easy to ring up a SKU based item inside of Restaurant Pro Express – simply scan the item at any time during the transaction using a bar code scanner. The quantity sold will deduct from the in stock value in the **Inventory Maintenance** screen.

There are a variety of useful inventory reports in the **Reporting Screen** to help you track your retail items. The simple numerical and alphabetical listings will show you what is currently in stock. More advanced reports, such as the **Item Activity Report** will show you what was sold and received of each item between a date range.

Restaurant Pro Express also has a built in **Purchase Orders** screen (accessible from the **Administrative** tab of the **Setup Screen**.) This screen can be used to place orders for items, print purchase orders and at a later time receive the items when they arrive at your restaurant. You can learn how to use the **Purchase Orders** feature by reading the F1 Help Section.

NOTE: If you are scanning SKU-based retail items with a bar code scanner, you may not want buttons from these items cluttering up your menu screen. If you would like to hide your retail items from the touch screen, the easiest way is to put them in one or more retail departments and hide the department buttons within the **Touch Screen Configuration** screen.

Tracking Your Employees

Employee Maintenance – Adding & Modifying Employees

The screenshot shows the 'Employee Maintenance' screen. At the top, it says 'Enter the information for this item and touch "Save" to save the employee'. Below this are fields for Department, Employee ID, Card Swipe ID, Customer, Password, Hourly Wage, and Display Name. There are checkboxes for 'Take CC Tips in Cash at End of Shift', 'Require Clock in Before Login', and 'Assign Card Access'. A 'Click to Select Picture' button is also present. Below these fields are tabs for 'Permissions', 'Personal Info', and 'Job Codes & Wages'. The 'Permissions' tab is active, showing a grid of permissions with 'Prompt' dropdowns. At the bottom, there are buttons for 'Previous', 'Next', 'Help', 'Duplicate', 'Delete', and 'Exit'.

It's important to track your employees and configure functions they have access to within your point of sale system. Employees and security, as well as job codes and other employee settings, are configured in the 'Employee Maintenance' screen which can be accessed from the 'File' menu of the 'Login Screen.' **A full tutorial of this screen is in the built-in F1 help section;** below are some basic pointers to get you started.

The basic steps of how to add an employee are included in step three in the '10 Steps to Getting Started'. Modifying an employee is just as simple; navigate to the employee using the buttons in the bottom left corner of the screen, modify the employee and click or touch the 'Save Changes' button to update the employee.

Swipe Cards and Security



The fastest and most secure way to log an employee into the system is to use a POS Access Card. Alternatively an employee can use a pin number or their username and password, which is not as secure as another employee may watch the login number typed in over their shoulder. When an employee needs to log in or clock in/out of the system or a manager needs to provide override permission, they can simply swipe their card which is faster, easier and more secure than a pin code or user name. POS Access cards can be purchased directly from PC America.

To assign a card, swipe the card into the 'Card Swipe ID' field using the MSR.

NOTE: The **Display Name** for an employee will print on guest checks and in the kitchen. Fill this field in for the results of a friendlier receipt and easier identification of orders in the kitchen. The employee ID will print in the case of the **Display Name** is left blank

Tracking Your Employees

Employee Security and Exceptions Tracking

Restaurant Pro Express can be configured in a flexible fashion, allowing you to define which employees can access which functions inside of the system. It is important to understand and properly configure the permissions to ensure employees can only access the functionality you want them to access.

Invoice Discounts

Invoice Price Changes

Delete Items

Prompt

Yes

No

Prompt

Override

Security is a priority within Restaurant Pro Express. The ‘Employee Maintenance’ screen has dozens of permissions which can be set individually for each employee and determine what that employee is allowed to or restricted from doing. Most of the permissions have four settings:

- **Yes** allows the use of a function
- **No** restricts the selected function
- **Prompt** asks for manager’s permission to use the selected function
- **Override** makes the selected an employee a manager for the selected function, meaning they can access the function and also give an employee with the ‘Prompt’ setting permission to use this function

The **Exceptions Tracking** features of RPE provide a great way to identify and track suspect activity. If you log a certain activity as an exception (ex: Server 01 ringing in a discount or Server 03 opening the cash drawer for change), RPE will record this instance in an Exceptions Log for later viewing. Even though many of these functions are already recorded for all employees, this will provide you with a list of functions and servers you would like to specifically watch.

Exceptions Tracking is a great analytical tool that will provide you with specific lists of activity you define as suspect without having to wade through pages of information. You can view the results in the **Operational Exceptions** report, viewable in the **Sales** tab of the **Reporting Screen**.

Log as Exception

Configuring **Exceptions Tracking** is easy; simply check the **Log as Exception** check box for each permission and employee combination that you wish to watch. This setting is configured individually for each employee and permission to provide maximum flexibility.

Tracking Your Employees

Job Codes, Time Clock, Hours & Wages

If you are just using the basics then you don't need to worry about job codes and the employee time clock. However these are valuable features that are easy to configure and will help you control your business.

Simply put, Job Codes are the different jobs that your employees work inside of your business. A few examples are server (waiter/waitress), bartender, cashier and chef. Job codes can be configured inside of the Employee Maintenance screen (by clicking the 'Job Code Setup' button.) You can configure if an employee working a certain job code may access the POS, if they handle cash and how many shift reports to print at the end of their shift. You can read more about these options in the built-in F1 Help Section.

After creating job codes, they can be assigned to an employee using the 'Add' button in the 'Job Codes & Wages' tab in 'Employee Maintenance.' Hourly wages and overtime wages are configured in the same tab. An employee can have more than one job code each with a different wage; when they clock in, they will be asked which job code they are working this shift.

To track the hours worked by your employees, have them clock in by touching the clock icon on the Login Screen. Staff members use the same icon to end their shift and clock out. In the occasional situation an employee forgets to clock in or clock out, the 'Time Clock Management' screen can be used to modify times. If you want to enforce that your employees clock-in before starting their shift, select the 'Require Clock-In Before Login.'

Typical steps for a server or cashier:

1. Servers (table service) or cashiers (quick service and table service) clock in when they come in for the day
2. They take orders and close out checks throughout the day
3. Any credit card tips are added before the end of the shift
4. At the end of the shift, the server or cashier clocks out and enters their closing cash amount
5. A shift report print is printed upon clock-out which includes a cash count that shows how much money was taken in and removed. At the bottom is an over/short amount that helps ensure that your cashiers are properly reporting and turning in the money they collected throughout the day.

Reporting
How to Use the Reporting Screen

Restaurant Pro Express has dozens of built-in reports that help you view and analyze sales figures, inventory and ingredients, efficiency, employee activity, customer history and a substantial amount of additional statistics and data regarding your restaurant operations. These reports are generated from the reporting screen which can be accessed from the 'Administrative' tab of the 'Options Screen'. There are six categories of reports you can choose from, listed down the left side.

To run a report, first select the report you'd like to run by clicking on its name in the 'Report' list box. Each report can be customized on the fly by selecting one or more pieces of criteria such as a date range, one or more cashier IDs, one or more registers, etc. For example you can run the 'Receipt Listing' report to see a detailed sales transaction listing for cashier 01 from January 1st, 2006 through January 5th, 2006.

The built-in reports will satisfy all or most of your reporting needs. The Restaurant Pro Express Enterprise Edition includes a built-in report writer which can be accessed by clicking on the 'Advanced Reporting' button. The report writer is for more computer savvy users that are familiar with report builders. Training Sessions on how to use the 'Advanced Reporting' section can be purchased from PC America.

Reporting
Listing of the Most Useful Reports

Most restaurateurs use less than ten of the built-in reports. It is a good idea to click on each report and read the description of what information the report includes. Many users miss out on valuable information simply because they haven't taken the time to learn the figures that each report generates and how it will benefit their business. Listed below are a few of the most useful reports.

Report Name	Category	Description
Invoice Totals Report	Sales	Summary of each invoice processed within a date range
Invoice Totals - Daily Summary	Sales	Summary by day with totals, # of tickets and average dollar amount per ticket
Grand Totals by Payment Method	Sales	Total dollar amount collected by each payment method with the option to break down by cashier
Detailed Daily Report	Sales	Detailed report with payment breakdowns (receipt printer)
Detailed Department Sales	Sales	Breakdown of items sold by department
General Hourly Report	Sales	Breakdown of income by hour within a day
Grand Totals by Date	Sales	Quick figure of how much was sold in a date range
Receipt Listing	Sales	Detailed summary of each check within a date range
Shift Summary	Sales	Summary of each server's shift
Financial Summary	Sales	Detailed 'picture' of your business within a date range, gathering all of your key figures in one compact report
Invoice and Operational Exceptions	Sales	List of functions that you have identified as suspicious with server ID and manager ID. Useful to prevent theft.
List Alphabetical	Inventory	Summary of your in stock inventory and value
Reorder Report	Inventory	Breakdown of items sold
Top Sellers	Inventory	See your best selling items
Discrepancy Report	Inventory	Identify what is in stock versus what should be in stock, use this to identify theft, waste and other loss factors
Top 10 Sellers	Inventory	Another report to identify the best sellers on your menu
Pending Orders \ Details	Inventory	Used for catering businesses to view future orders
A/R Summary	Customer	View a list of all outstanding accounts
Purchasers of Item	Customer	View all customers who purchased a specific menu item so you may market to them for similar new menu items
Sales History	Customer	Detailed list of which customers ordered which menu items
Hours and Wages	Employee	List the hours, wages and tips of your employees
Server Tips	Employee	Tip details for each server
Commissions	Employee	View the commissions you rewarded to your servers for recommending and selling certain items
# of People Server	Restaurant	Crucial statistic for any restaurant
Ingredients – Theoretical Usage	Restaurant	List of the ingredients that should have been used based on your sales, use this as a shopping list for future food purchases or to prevent theft and loss

Before You Begin

In order to communicate between stores, they must have a way of connecting to a main location where the corporate database will be stored. Normally, the corporate database is located in the main office of the entire store/restaurant wide operation. This is where the Host Module will be loaded onto an office computer.

About Virtual Private Networks

In recent years, the most popular and cost effective way to connect one location of a business to another is by a Virtual Private Network (VPN). A VPN uses the Internet to communicate from one location to another. Using a DSL, Cable, T1/T3, ISDN, or even modem, you can connect one location to another via a VPN, where your data will be encrypted to protect your business from unwanted intrusion. A VPN, in effect, puts one location on the same network as another with security.

It is our recommendation to use a dedicated Internet connection, such as DSL, T1/T3, or Cable Modem so as to prevent drops in your Internet service. We DO NOT recommend connecting through a modem using a regular telephone line.

You must have a VPN, or equivalent form of communication, between your business locations prior to setting up your CRE/RPE multi-site point-of-sale system. You may contact PC America for recommendations on companies who will help you set up a VPN for your business.

Host Module – Connecting Multiple Restaurants

Configuring Your System to Accept Connections

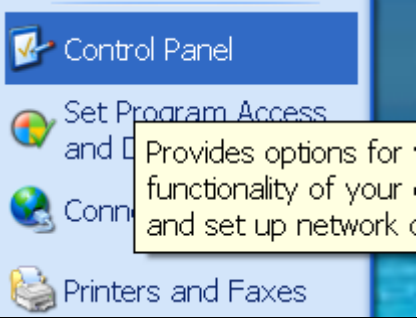

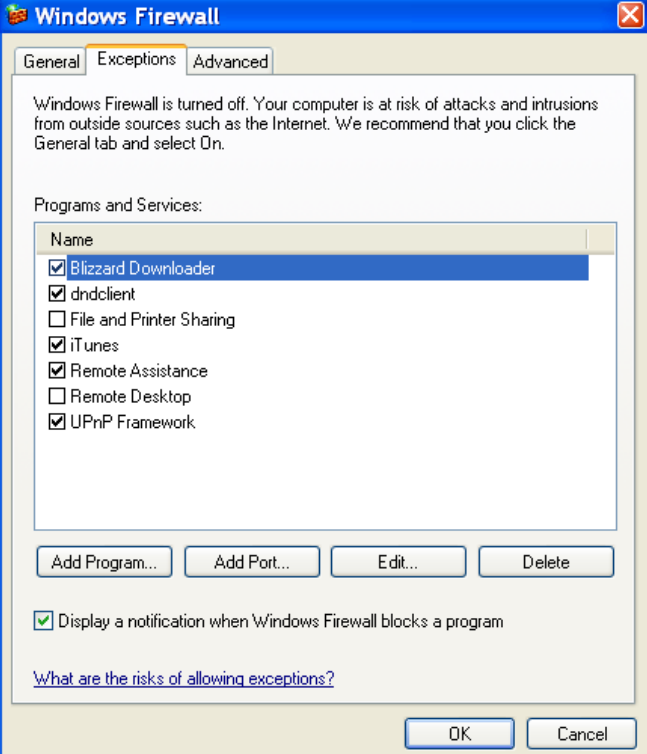
On a multi user environment, it may be necessary to adjust firewall or anti-virus worm protection settings to allow communication between computers. Picture your network as a road map where each computer is like a house in a neighborhood. Each house has an address and you must travel by a road or route to get to another house. Much like this roadmap, each computer has an address and data must travel from computer to computer through a route, called a port. In order to block unwanted visitors to your computer, it is necessary to use a firewall or some form of worm protection. Sometimes firewalls and worm protection software may block data that you need. Therefore it is necessary to make sure the port that CRE/RPE uses is unblocked. You may put certain restrictions where only certain computers can have access to this port.

By default, CRE/RPE communicates through Port 50,000. When creating an exception to the firewall, open the port you specify as TCP.

Host Module – Connecting Multiple Restaurants

Configuring Your System to Accept Connections

To configure the Microsoft Windows XP (Service Pack 2) Firewall:

	<p>1. Go to Control Panel</p>
	<p>2. Double click on the Windows Firewall icon</p>
	<p>3. Click the Exceptions tab</p> <p>4. Click Add Port</p>

Host Module – Connecting Multiple Restaurants

Configuring Your System to Accept Connections

5. In the Name field, you may specify a name to identify the program (CRE or RPE)

6. In the Port Number Field, type the port that you choose to have CRE/RPE listening on. In our example above, you would choose 50,000.

7. Choose TCP under the Port number field.

8. Click Change Scope

9. Choose My network (subnet) only. This will only allow computers within your local network to have access to this computer through the port specified above.

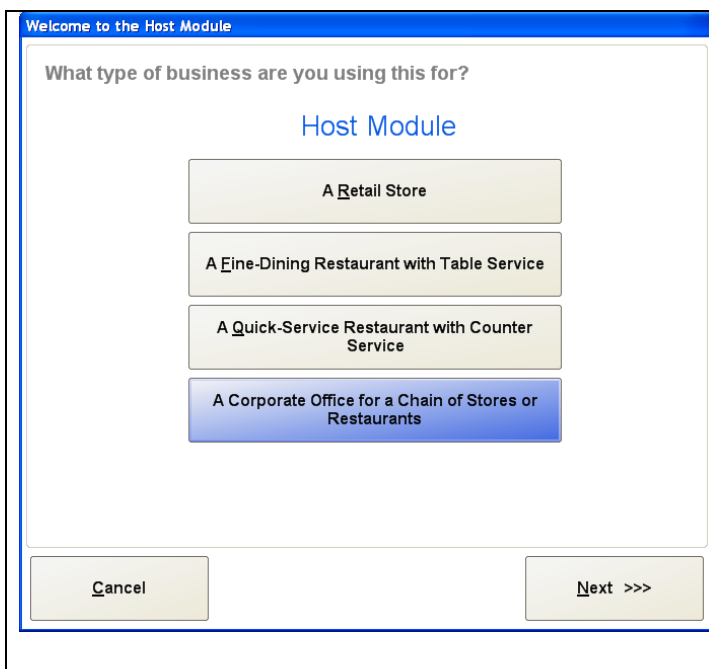
10. Click Ok twice to save the changes and exit the Windows Firewall Settings.

Host Module – Connecting Multiple Restaurants

Setting Up Your Corporate Database

The Corporate Host Module must be installed at the same location as the corporate database. You may purchase licenses of the Host Module on as many computers as you need, as long as they have a direct connection to the main corporate database.

Step 1: Configure your station to be a Corporate Host Module



Welcome to the Host Module

What type of business are you using this for?

Host Module

A Retail Store

A Fine-Dining Restaurant with Table Service

A Quick-Service Restaurant with Counter Service

A Corporate Office for a Chain of Stores or Restaurants

Cancel

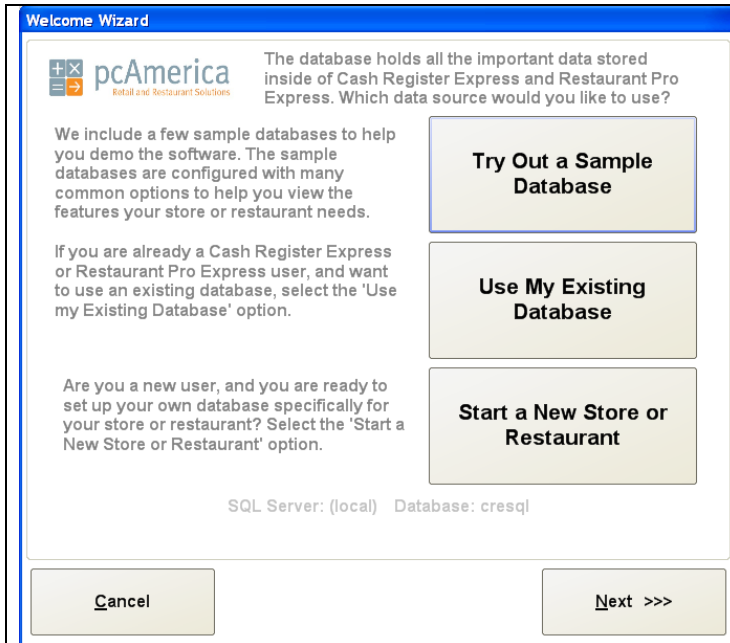
Next >>>

Once you have installed CRE/RPE from the CD, you will be taken to a welcome screen where you will need to select the Industry Type. If you have already installed CRE/RPE on this station, then you can reach the Industry Selection Screen from the **File Menu** of the **Log In Screen**, under **Select Industry**. You will be prompted for the Administrator's password to access the Industry Selection Screen. To set this station to be the Host Module, select **A Corporate Office for a Chain of Stores or Restaurants**, then click **Next** to continue.


Host Module – Connecting Multiple Restaurants

Setting Up Your Corporate Database

Step 2: Create a New Database



Welcome Wizard

 **pcAmerica**
Retail and Restaurant Solutions

The database holds all the important data stored inside of Cash Register Express and Restaurant Pro Express. Which data source would you like to use?

We include a few sample databases to help you demo the software. The sample databases are configured with many common options to help you view the features your store or restaurant needs.

If you are already a Cash Register Express or Restaurant Pro Express user, and want to use an existing database, select the 'Use My Existing Database' option.

Are you a new user, and you are ready to set up your own database specifically for your store or restaurant? Select the 'Start a New Store or Restaurant' option.

Try Out a Sample Database

Use My Existing Database

Start a New Store or Restaurant

SQL Server: (local) Database: cresql

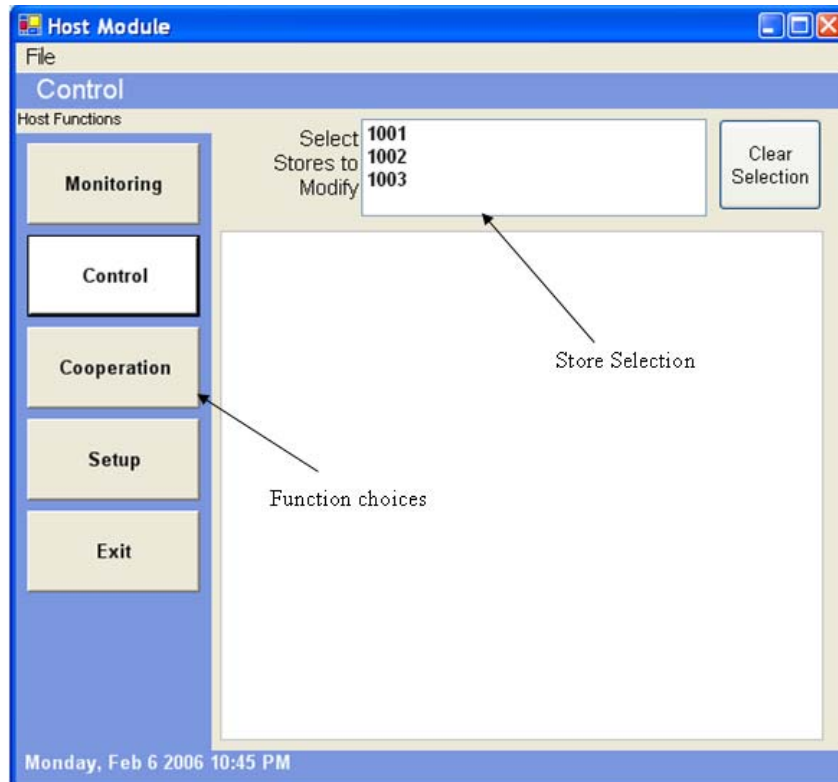
Cancel **Next >>>**

When installing for the first time, you will be prompted to select one of three options related to connecting to a database. To begin a new corporate database, select **Start a New Store or Restaurant**. Once you have selected this option, your database will automatically be created and activated on this computer.

Now that the Corporate Database has been created you may now setup and configure your stores. Once you have configured your stores, each store's server can connect to the corporate database under their store id. The next section explains how to navigate the Host Module and set up your stores.

Host Module – Connecting Multiple Restaurants

Common Areas of the Host Module

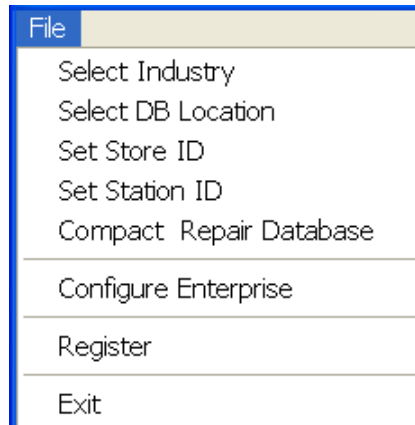


The common areas of the host module are the File Menu, Store Selection section, the Host Functions buttons. These sections are apparent throughout the entire program, and are accessible at all times.

Host Module – Connecting Multiple Restaurants

Common Areas of the Host Module

The File Menu



The File Menu contains the features for configuring your system:

- Select Industry** – You may specify the interface you wish to run this station as. You may configure it to be a retail station, restaurant station or a host module station.
- Select DB Location** – You may choose the location of the SQL database. You may also choose to use your own database, a new blank database, or a sample database.
- Set Store ID** – You may set the store id of this register. When setting the store id of this station, these settings will remain until you change it.
- Set Station ID** – This sets the default station id of this register. Once you change the station id, the setting will remain until you change it.
- Compact and Repair Database** – This is a utility that compacts and re-indexes an Access database. It is not necessary to use this feature if you are using a SQL database.
- Configure Enterprise** – You may set up and configure your station to synchronize data with a main or corporate database within your operation. When the Enterprise feature is activated, you will achieve a level of redundancy so as not to lose your ability to operate your station should the network fail.
- Register** - This is where you register and activate your station. Once you register the station, it will be unlocked for unlimited use.
- Exit** - You may exit to the log in screen from this selection.

Host Module – Connecting Multiple Restaurants
Common Areas of the Host Module

The Store Selection Section

The screenshot shows a window titled 'Host Functions' with a section for 'Select Stores to Modify'. It contains a list of three stores: 1001, 1002, and 1003. The store 1002 is highlighted. To the right of the list is a button labeled 'Clear Selection'.

The Store Selection section is where you may choose which stores to modify or configure data for. If you would like to view and edit inventory for store 1002, simply select and highlight 1002 and enter the Inventory Maintenance. All the data that you edit or add will be sent to that store. You may select multiple stores by clicking on each one. When multiple stores are selected, all the data for the selected stores will be sent to those stores.

NOTE: IF NO STORES ARE SELECTED, THE HOST MODULE WILL BE SET TO MODIFY DATA FOR ALL STORES

To clear the selections you have made, you may either click on the highlighted store to unselect it or Clear Selection to clear all selections at once.

Host Functions

The screenshot shows a vertical sidebar titled 'Host Functions'. It contains five buttons: 'Monitoring', 'Control', 'Cooperation', 'Setup', and 'Exit'. The 'Control' button is highlighted with a black border.

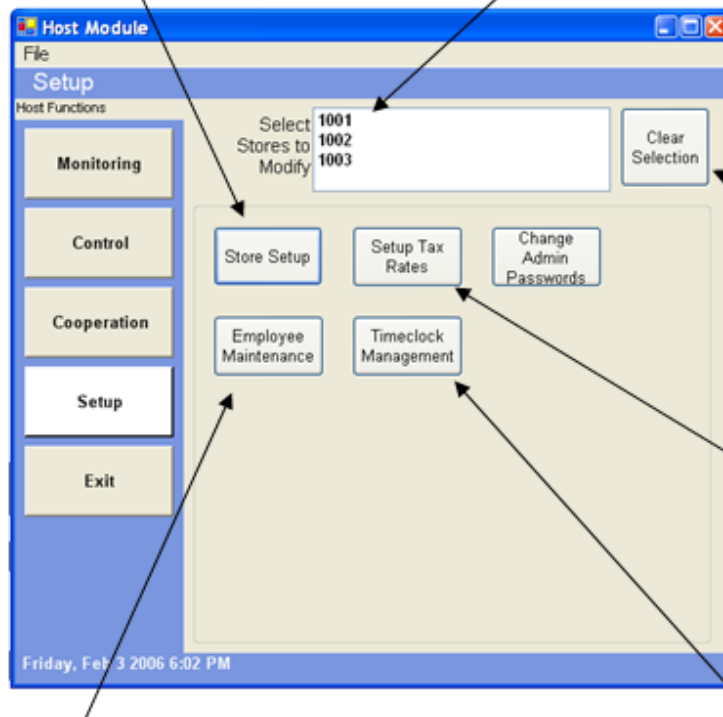
The side bar of the Host Module is made up of buttons that take you to the functions that you may perform. You may view reports, edit inventory, vendors, departments, categories, purchase orders, customers and loyalty plans as well as configure your stores. In the next section, we will describe each function in more detail.

Host Module – Connecting Multiple Restaurants

Setup

Store Setup—You may add, delete and copy inventory to stores

Displays all store id's in your entire operation. You may select more than one store id by left-clicking as many stores id's as you would like.



Clears your selection of store id's

Sets up tax rates at each location

Add, edit or delete your employees and set permissions corporation wide.

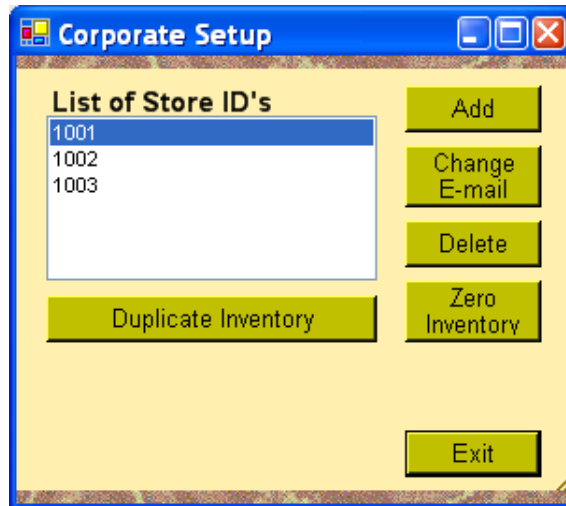
Allows you to manage your employees' clock in and clock out information.

The Setup Screen is where you set up your stores, configure your employees, set corporate wide tax rates, change administrator passwords and manage employee time-clocks.

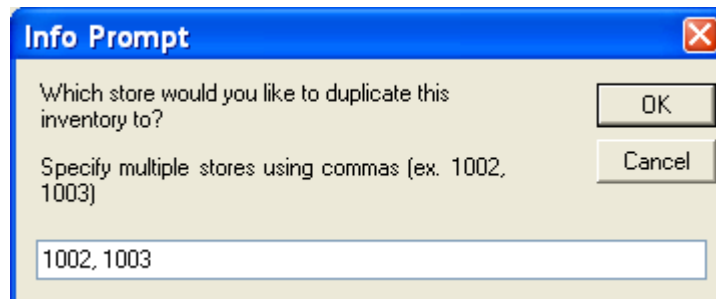
Host Module – Connecting Multiple Restaurants

Setup

Store Setup



To add a store, simply press the add button and type the store id you wish to use for then new store. You may choose to **duplicate inventory** to the new store by highlighting the store id you wish to duplicate inventory from and pressing the Duplicate Inventory button. You will be prompted to type which store you would like to duplicate the inventory to. If you have multiple stores that you wish to copy from an original store, you may type them all in separated by a comma. See the picture below.



This will copy the inventory from the highlighted store to the store(s) you specified.

You may delete a store by pressing the Delete button.

Finally, you may use the Zero Inventory button to set all in stock levels to 0 for the stores that you select. You may wish to do this when you start a brand new store where you are unaware of the stock levels. We recommend doing a physical inventory and adjust the levels from the store. The in stock levels will then transmit to the host.

Host Module – Connecting Multiple Restaurants

Setup

Setup Tax Rates

The screenshot shows the 'Set Tax Rate' dialog box with the 'Default Tax Rate' tab selected. It contains a table with columns: Store ID, Tax1 Rate, Tax1, Tax2 Rate, Tax2, Tax3 Rate, and Tax3. The table lists three stores: 1001, 1002, and 1003. Below the table is a scrollable area and two buttons: 'UPDATE' and 'Cancel'.

Store ID	Tax1 Rate	Tax1	Tax2 Rate	Tax2	Tax3 Rate	Tax3
1001	8.25	Tax	0	Tax 2	0	Tax 3
1002	7.75	Tax	4.25	Tax 2	0	Tax 3
1003	7.25	Tax	4	Tax 2	2	Tax 3

The **Setup Tax Rates** section allows you to enter the tax rates for each store. Each store can have up to 3 tax rates. You may choose the tax rate in the grid and simply make the change right on screen.

Alternatively, you may select the **Area Tax Rate** to add multiple tax rates within an area.

The screenshot shows the 'Set Tax Rate' dialog box with the 'Area Tax Rates' tab selected. It contains a table with columns: ID, Area, Description, and Percent. The table lists three areas: 0 NONE, 1 Rockland, and 2 Orange. Below the table are three buttons: 'Add' (green), 'Change Rate' (yellow), and 'Remove' (red). At the bottom are 'UPDATE' and 'Cancel' buttons.

ID	Area	Description	Percent
0	NONE	DEFAULT	0.000%
1	Rockland	Rockland	8.000%
2	Orange	Orange	7.750%

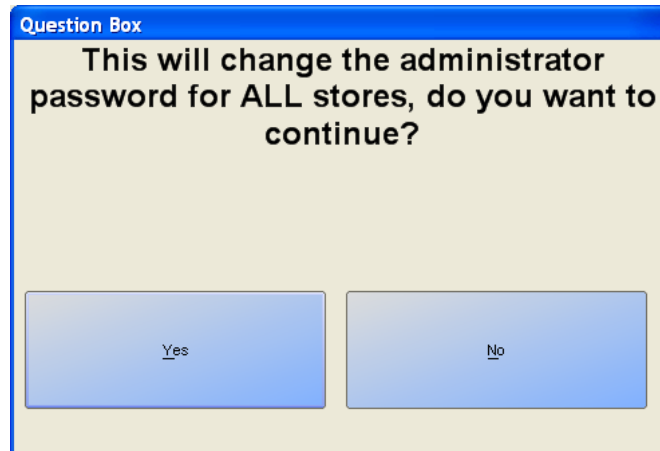
To add a new tax rate, press the Add button. You will be prompted for an Area Id, a Description and a percentage for the tax rate in that area. This feature is designed for charging the appropriate tax rate based on the area that a customer resides. You may select the area that the customer is located in the Extended Info tab of Customer Maintenance. When the customer is selected for the invoice, the appropriate tax rate will be charged. This feature is best used in a mail order scenario where you must charge the correct tax when shipping products to a taxable destination.

Host Module – Connecting Multiple Restaurants

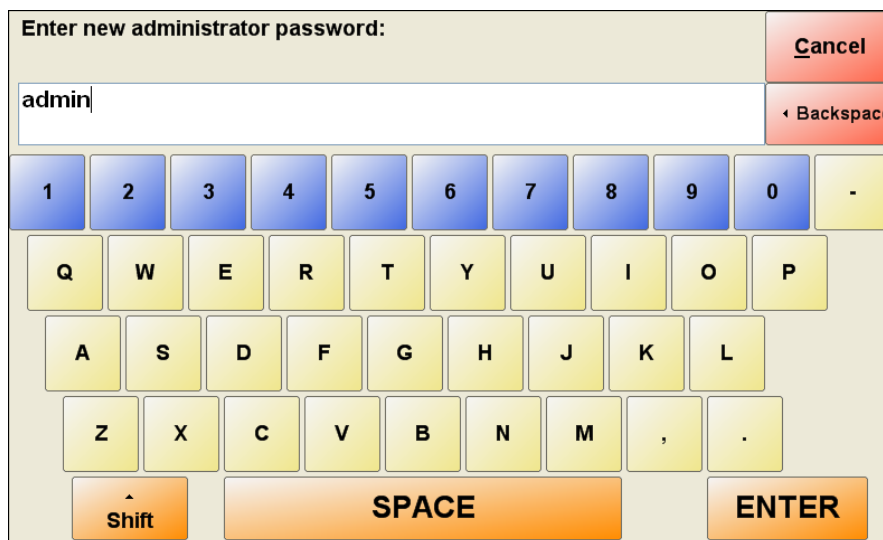
Setup

Change Admin Passwords

You may change the administrator's password for all stores by pressing the Change Admin Passwords button. **PLEASE NOTE: THIS WILL CHANGE THE ADMINISTRATOR'S PASSWORDS FOR ALL STORES.**



Pressing Yes, will take you to an onscreen keyboard input screen where you may type a new password. Once you press Enter, all stores will be reset to the new administrator password.



Employee Maintenance

The CRE/RPE Host module allows you to configure your employees from the corporate office. You may add, edit or even delete employees at the touch of the button.

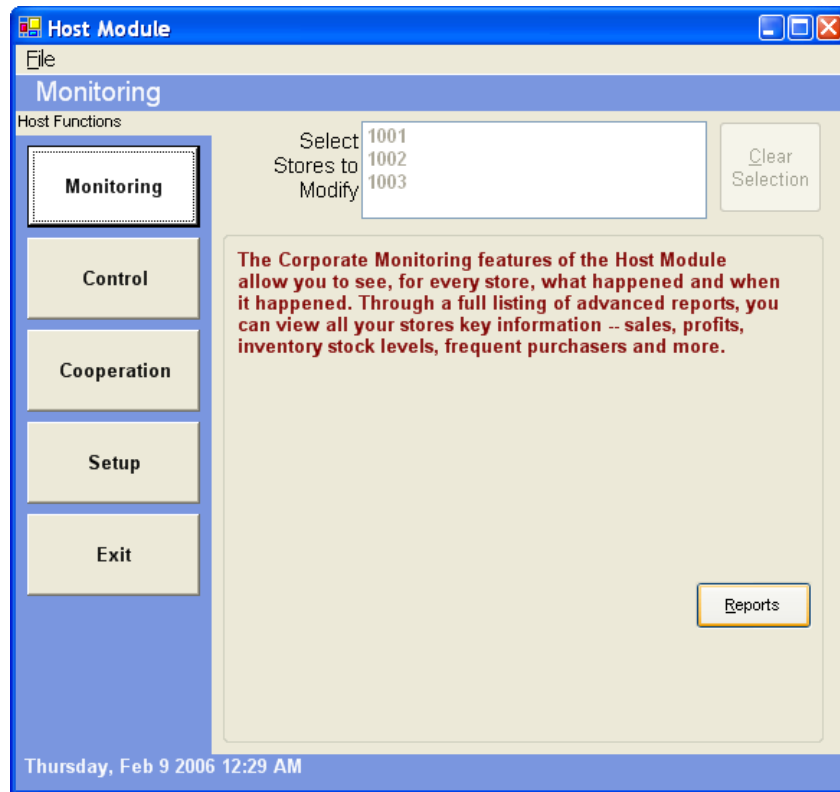
The Employee Maintenance screen is exactly the same screen within CRE/RPE. Please refer to the Employee Maintenance section of this manual for information on configuring your employees. You may also refer to the F1 Help Screen under Managerial Functions and then Employee Maintenance, for more detailed instructions on this feature.

You may also access the Employee Maintenance screen from the File menu of the Log In Screen.

Host Module – Connecting Multiple Restaurants

Monitoring

The Monitoring Screen



The main function of the monitoring screen is reporting. From this screen you may access a vast number of reports to view the progress of your store or your entire operation. The only button present on the screen is the **Reports** button. Press this button to access the reporting screen. As you will notice, the reporting screen is practically identical to the reporting screen within CRE/RPE. The only difference is that the Host Module adds store id as another criteria to sort your reports.

Host Module – Connecting Multiple Restaurants

Monitoring

Navigating the Reporting Screen

Choose from a list of categories of reports to view.

List of all reports within the selected category

Area of the reporting screen where you may specify the date and time range of each report. If the report does not use a date/time range, then the fields below will display as faded.

Allows you to breakdown report by department

Breakdown report by station id.

Breakdown report by store id.

Breakdown report by category.

Breakdown report by vendor

Breakdown report by cashier id.

Summarized the function of the report.

The screenshot shows the 'Reporting' window with the following sections and annotations:

- Category:** A list of categories including Sales, Inventory, Customer, Employee, Restaurant, and Rentals. An annotation points to this list: 'Choose from a list of categories of reports to view.'
- Report:** A list of reports under the selected category, including 'Invoice Totals Report', 'Invoice Totals by Customer', 'Invoice Totals -- Daily Summary', 'Grand Totals by Payment Method', and 'Daily Totals'. An annotation points to this list: 'List of all reports within the selected category'.
- Date/Time Range:** Fields for Start Date, Start Time, End Date, and End Time. An annotation points to this section: 'Area of the reporting screen where you may specify the date and time range of each report. If the report does not use a date/time range, then the fields below will display as faded.'
- Criteria:** A section with various selection fields, each with a green 'ALL' button. An annotation points to the 'ALL' buttons: 'Green = ALL in list selected Red = One or more selected'.
 - Select Cashier:** Lists 01, JB, KM, MS, RC. An annotation points to this field: 'Breakdown report by cashier id.'
 - Select Department:** Lists Apps, Beverage, Desserts, Entrees, NONE. An annotation points to this field: 'Allows you to breakdown report by department'.
 - Select Station:** Lists 01, 02, 03. An annotation points to this field: 'Breakdown report by station id.'
 - Select Vendor:** Lists 101, 102, 103. An annotation points to this field: 'Breakdown report by vendor'.
 - Select Category:** Lists Food, NONE, Supplies. An annotation points to this field: 'Breakdown report by category.'
 - Select Store I:** Lists 1001, 1002, 1003. An annotation points to this field: 'Breakdown report by store id.'
- Buttons:** 'Display', 'Print', and 'Exit' buttons are at the bottom right.
- Advanced Reporting:** A button in the top right corner.
- Summary:** A link labeled 'View a detailed list of all the invoices processed within a given date range.' An annotation points to this link: 'Summarized the function of the report.'

The **Reporting Screen** allows you to choose various reports and breakdown each report by different criteria. The Category section of the reporting screen allows you to choose from Sales reports, Inventory reports, Customer reports, Employee reports, Restaurant reports and Rental reports.

Host Module – Connecting Multiple Restaurants

Monitoring

Once you select a category, the Report window will populate with the appropriate reports for that category. When you highlight a report, some criteria will be activated to indicate that you may breakdown the report by that criteria. In the above illustration, the Invoice Totals report allows you to breakdown the report by Cashier Id, Station Id and Store Id.

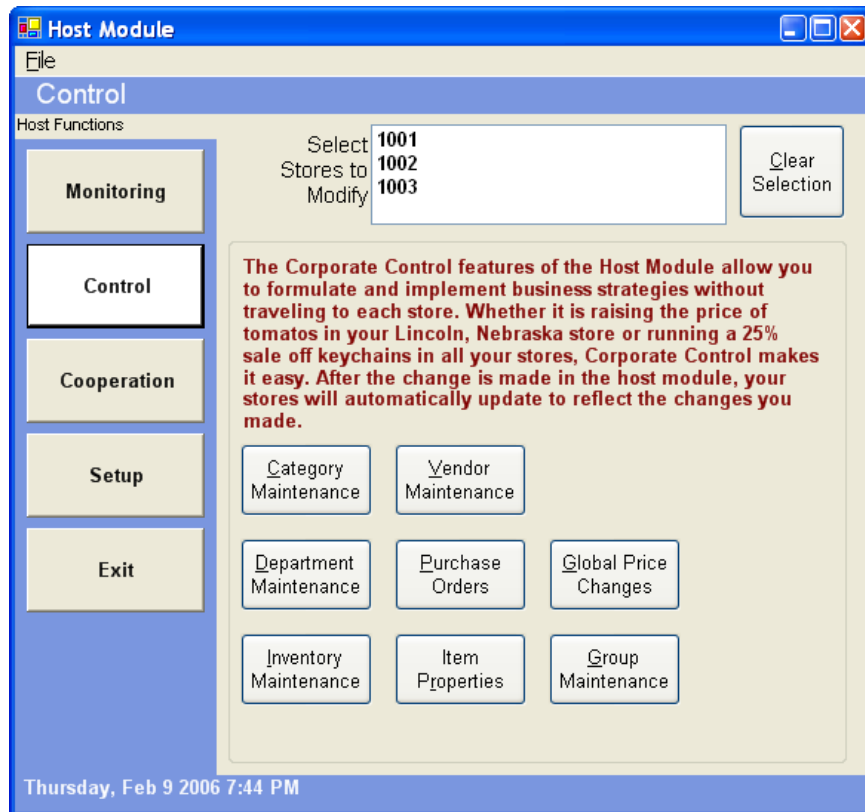
To view a report:

1. Select the category for the report you would like to view
2. Choose the actual report by highlighting it from the Report window
3. Select the date and time range by entering the Start Date as well as the End Date.
Please Note: The reporting screen always defaults to today's date between the hours of 12:00:00 AM and 11:59:59 pm. This encompasses the entire day.
4. Choose the criteria you wish to breakdown the report with. You may press the All button to select all criteria. For example, you may wish to show the Invoice Totals report for all Stations and All Cashiers.

The **Advanced Reporting** feature is a built-in report writing module. For more information or training on report writing, you may contact PC America (1-800-722-6374) for more information.

Host Module – Connecting Multiple Restaurants

Control



The **Control function** of the Host Module is where you can add or edit Categories, Vendors, Departments, Purchase Orders, Global Price Changes, Inventory and Groups as well as changing Item Properties. All features present in this screen are also accessible, at the store level, from within CRE/RPE via the Options Screen. All screens are identical. The only difference in the Host Module is that you may alter the information in each function for multiple stores.

You may specify which store(s) you wish to change data for by selecting them from the Store Selection box at the top of the screen. When editing any of the functions (Inventory Maintenance, Vendor Maintenance, etc), you will be accessing a master record list corresponding to the function you have selected. The master list encompasses all the records of any store in the entire operation that you have selected. For example, if you select all stores, you will see all items in Inventory for the entire operation. If Store 1003 has an item that the other stores do not have, then that store would have to be highlighted to view the item that is unique to that store. So if 1003 and 1002 are highlighted, you will have all the inventory available to you from stores 1002 and 1003.

Category Maintenance

The screenshot shows a 'Category Maintenance' window. On the left side, there are four buttons: 'Add', 'Update', 'Delete', and 'Exit'. On the right side, there are two text input fields: 'Category ID' with the value 'Supplies' and 'Description' with the value 'Supplies'. Below these fields is a search section with a left arrow button, a dropdown menu labeled 'Search by Category ID', and a right arrow button.

Categories are the most general form of categorizing items. You may have inventory items that are part of a department and a department that is part of a category. Generally you have very few categories. For example, you may have a restaurant that has two categories; Food and Supplies. If you wish to track food items, you may create departments under the Food category. You may also track supplies, such as to go food containers, pizza boxes, or cups that may fall under the departments in the Supplies category.

To Add a category, press the Add button. Then enter the Category ID and a Description. Click Save to save the category. If you wish to update the category, you may not change the Category ID. You may only change the Description. If you wish to change the ID, you must first delete the category and then re-add it.

Host Module – Connecting Multiple Restaurants

Control

Vendor Maintenance

The screenshot shows a software window titled "Vendor Maintenance" with a sub-header "Info". Below this is a yellow banner that reads "General Information for General Warehouse" with a "Keyboard" button on the right. The form is divided into several sections: "General Info" with fields for Vendor Number (101), Company Name (General Warehouse), PO Delivery Method (dropdown), Terms, Flat Rent Rate (\$0.00), Tax ID, Minimum Order (\$0.00), Commission % (0), Billable Department, and Social Security #; "Address" with fields for Street Address, Extended Address, City, State, Zip Code, and Country; and "Contact Info" with fields for First Name, Last Name, Telephone Number, Fax Number, Email, and Website. At the bottom, there is a "Search by Company" dropdown, a "Help" button, a "Store Priorities" button, and a row of action buttons: "Previous" (blue with left arrow), "Next" (blue with right arrow), "Add" (green), "Save Changes" (green), "Delete" (red), and "Exit" (red).

Vendor Maintenance is the function that allows you to enter vendor information. Vendors are companies that you purchase products from. In the CRE/RPE Host Module, you can control the vendor information for all stores.. It is important to enter vendors in for the purpose of Purchase Orders (refer to the F1 Help Screen under Inventory Control and then Purchase Orders for more information). Once vendors are added into the system, you may assign inventory items to a vendor to indicate where you purchase the item from. Please refer to the F1 Help Screen on Inventory Maintenance for instructions on how to assign a vendor to an item.

To **Add a Vendor**, simply press the Add button and fill in the appropriate information. Required fields are the Vendor Number, which is a unique identifying number for the vendor and the Company Name. You may also **Edit a Vendor** by simply editing the fields you wish to change. The Vendor Number cannot be edited. If you need to change the Vendor Number, you must delete the vendor and re-add it again. **WARNING: IF YOU HAVE INVENTORY ASSIGNED TO THE VENDOR, THEN DELETING THE VENDOR WILL DELETE THE ASSOCIATION OF ITEMS TO THAT VENDOR. YOU WILL HAVE TO RE-ASSIGN THE ITEMS TO THE NEW VENDOR.**

Host Module – Connecting Multiple Restaurants

Control

Department Maintenance

Department Maintenance

Info

General Information for Appetizers

Keyboard

Category for this Department: NONE - NONE

Department ID: Apps

Department Description: Appetizers

Regular

Rental

Employee

Options

Receipt Notes

☐ Print Department Notes on Receipt

☐ Require Permission for Sale

☐ Require Serial #/ Reference Entry

☐ Bar Tax Inclusive

Square Footage: 0

Item Cost Percentage: 0

Previous

Lookup

Next

Add Department

Save Changes

Category Maintenance

Help

Duplicate

Delete

Exit

You may enter your departments for your store via **Department Maintenance**. Select which stores to modify by highlighting the store id from the Store ID Selection window on the top portion of the Host Module and then press the Department Maintenance button to enter the screen above.

Departments are used to categorize inventory items. For example, in a restaurant, you may specify Entrée as a department where the items you wish to select for an invoice can be found in that department.

For more information on Department Maintenance, please refer to the F1 Help Screen under Inventory Control and then Department Maintenance.

Host Module – Connecting Multiple Restaurants

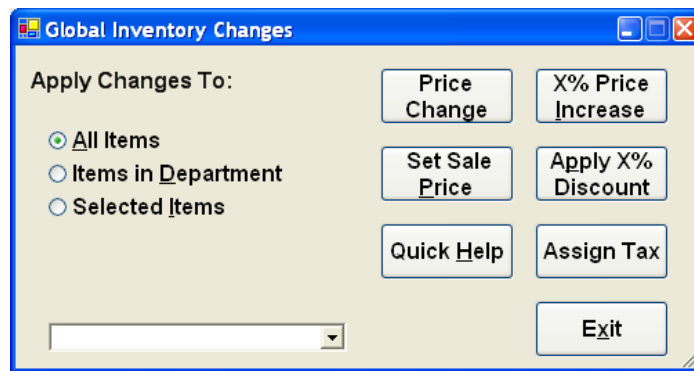
Control

Purchase Orders

The Purchase Order screen allows you to create an order from your vendors. From the corporate office of Host Module location, you may create or edit purchase orders for each store.

Simply select the store id you wish to access purchase orders for and press the Purchase Order button. All additions or changes made will be transmitted to the selected stores. For more information on how to use Purchase Orders, please refer to the F1 Help screen under Inventory Control and then Purchase Orders.

Global Price Changes



The Global Price change feature allows you to change prices of all or some of your items instantly. Select which store you wish to modify and choose the Global Price Change button to access this screen.

Once inside this screen, you may select to modify All Items, Items in a particular department or a list of selected items. After you select which items to apply the changes to, you may then choose the option you want:

Price Change – This feature will change all the prices for the items you selected to the price you specify. Generally, you do not change the price for All items, so be careful on which selection you have chosen where it says Apply Changes To.

X% Price Increase – This will allow you to increase the item prices for all items you have selected by a fixed percentage amount.

Host Module – Connecting Multiple Restaurants

Control

Set Sale Price - This will change the price of an item between a certain date range. Once you specify the price, you will be prompted to enter a start and end date for the sale. Again, it is recommended that you be careful as to what selection you have made where it says **Apply Changes To** on the left portion of the screen. Normally, you would not have **All Items** selected for this feature.

Apply X% Discount – This is virtually the opposite of X% Price Increase. By selecting this feature, you may discount all items selected by a percentage.

Quick Help – This will bring up a quick help screen explaining the Global Price Changes in more detail

Assign Tax – You may globally assign a tax rate to all items selected.

Inventory Maintenance

Using the Host Module, you may add or edit inventory for all stores selected in the Store ID Selection box at the top portion of the screen. The Inventory Maintenance screen within the Host Module is identical to the Inventory Maintenance screen within CRE/RPE.

For more information on adding or editing inventory, please refer to the F1 Help screen under Inventory Control. You may also refer to the section on Inventory Maintenance earlier in this manual.

Item Properties

For more information on Item Properties, please refer to the F1 Help Section under Inventory Control.

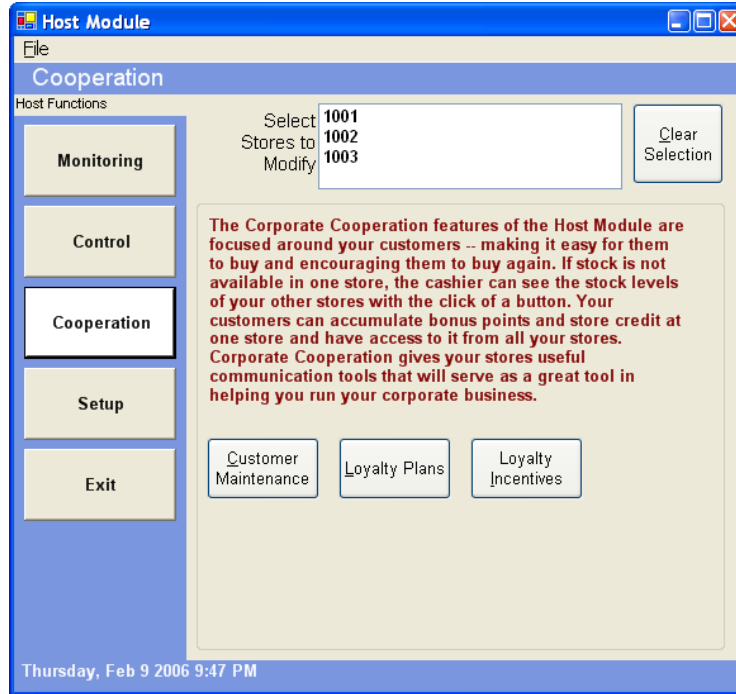
Styles Matrix

Styles Matrix is a feature designed to be used when you have many variations of the same item, usually with different dimensional attributes. For example, a particular style of clothing may come in different sizes and colors. You may create a group to specify the general style and then specify the dimensions of that style. Then you may easily track the inventory of each variation through an on-screen grid.

This feature is geared more to retail than to hospitality, but can be used in any scenario. For more information on setting up groups (also called styles), please refer to the F1 Help Section under Inventory Control and then Styles Matrix.

Host Module – Connecting Multiple Restaurants

Cooperation



The CRE/RPE customer base is globally shared throughout your entire operation. When a customer is entered into a store's register, it will be transmitted to the Host and then back to all the remaining stores. This opens up the ability to share information such as customer account info as well as company wide loyalty incentives and gift cards. For example, a customer may be sold a gift card at one location and they may redeem the gift card at another location. Since CRE/RPE has self contained gift card and loyalty features built-in, you do not have to incur processing fees from an outside gift and loyalty card processor

The three features located in the Cooperation Function are **Customer Maintenance**, **Loyalty Plans** and **Loyalty Incentives**.

Host Module – Connecting Multiple Restaurants

Cooperation

Customer Maintenance

The **Customer Maintenance** screen in the Host Module is identical the Customer Maintenance screen within CRE/RPE. From the Host Module, you may view, add or edit all customers in the entire operation. Any customer entered at any store will be transmitted to the corporate database and accessible from within the Host Module's Cooperation function.

For more information on adding or editing customers, you may refer to the F1 Help section under Customer Maintenance. A brief tutorial can be found earlier in this manual in the Tracking Your Customers section.

Loyalty Plans and Loyalty Incentives

Loyalty Plans and Incentives go hand in hand where a Loyalty Plan is made up of incentives. First, you would set up an incentive and then add the incentive to a plan. The CRE/RPE Host Module allows you to add and edit these plans on a corporate wide scale. An example of an incentive might be a free gift when a customer purchases a certain amount from your business. Once the customer reaches a certain dollar amount, the cashier will be prompted to add the free gift to the invoice. In this case, the free gift is the incentive. The customer must be added to the Loyalty Plan in order to receive the incentive. The Loyalty Plan and Loyalty Incentive screens are identical to the screens from within CRE/RPE. Please refer to the F1 Help section on Customer Loyalty for more information on creating an adding customers to these loyalty features.

Help and Technical Support
Training Sessions and Contacting Technical Support

Got a question? We're here to help.

PC America offers a variety of technical services to help ease your transition, make you comfortable with your new point of sale system and help you with any problems you may have. Contact our sales department to purchase any of our service offerings.

Our **Hourly Training** service is a great way to learn your new point of sale system. A trained engineer will spend a full hour with you on the phone (or over the internet) to walk you through some of our features step by step. They can recommend which features you should use for YOUR business or you can tell them what you'd like to learn. Many business owners also purchase this service after owning the system for many months or years in order to learn new features that they haven't used yet.

A bundled **technical support and upgrades package** is a must-have for your business. This service is purchased on an annual basis and includes not only your technical support but also all the new versions of Restaurant Pro Express released in that year. On average PC America releases four new versions, each packed with new features.

Need more coverage? PC America offers a **24-7 emergency support contract upgrade** which gives you the highest level of comfort that everything is 100% at your restaurant.

Are you too busy to program your menu? Our engineers can do it for you with our **Menu Programming Service**. Send us a copy of your menu with a list of all your appetizers, entrees, modifiers, drinks, prices, etc. and one of our engineers will input the entire menu into the system for you.

Department	Contact Info
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Technical Support	845-920-0888 tech@pcamerica.com
Technical Support (AOL Instant Messenger)	Screen names posnow, posnow2 or posnow4

Thank you for choosing PC America.