

BarkeepApp User Guide for iPad

Version 7.1 October 2024

The Instructions in this User Guide are intended for the **iPad** users. **iPhone** and **iPod Touch** users should refer to the **BarkeepApp iPhone User Guide**.

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About Barkeep v7.1

Barkeep is a liquor inventory tracking system designed exclusively for the Apple **iPad**, **iPhone** and **iPod Touch**.

Barkeep allows you to track your liquor inventory and usage, determine your Pour Cost, manage Suppliers and liquor orders, and track and analyze sales.

To run a successful bar or nightclub, it is extremely important to understand and manage your Pour Cost. Barkeep helps you understand and track how well your bar is performing by determining exactly how much liquor your bar SHOULD have used based on sales and comparing that with how much liquor your bar ACTUALLY used. This comparison between Expected Usage and Actual Usage is the key piece of information that will allow you to

- Identify problem areas
- Set concrete metrics for your staff and managers
- Track progress
- Reduce costs by eliminating over-pouring
- Increase sales by reducing undercharging
- Improving staff training by identifying errors and correcting them

The primary goal of Barkeep is to make your business more successful. However, at Barkeep we have a secondary goal that is almost as important to us – that our product should be fun and easy to use. There's no reason that inventory has to be a slow and painful process – so we work hard to make the process as fast, easy, and accurate as possible. Our product adheres to the Apple **iPhone** Human Interface Guidelines so that new users can feel immediately comfortable interacting with a familiar **iPhone** interface.

System Requirements

BarkeepApp

BarkeepApp v7.1 requires **iOS** version 12.0 or later.

Hardware Required

BarkeepApp v7.1 is compatible with the following:

- iPad 5 or later, iPad Mini 2 or later
- iPhone 5s or later
- iPod Touch (6th generation) or later

The barcode scanning with built-in camera on all compatible **iOS** Devices.

- iPad
- iPad Mini
- iPhone 5s or later
- iPod Touch 6th generation or 7th generation.

Linea Pro scanner for iPhone/iPod users.

(available by special order from barkeepapp.com)

Note:

- The Linea Pro only works with the iPhone 5s and 6s, iPhone SE, iPhone 6 or later
- and the iPod Touch 6th or 7th generation.
- A Linea Pro for iPhone Plus models is available by special order
- The Linea Pro will not work with earlier models.
- The Linea Pro will not work with iPhone X/XS.
- The Linea Pro for iPhone 15 is coming soon.
- The Linea Pro requires that you match the corresponding version to your iPhone/iPod Touch (e.g., Linea Pro for iPhone 6s, Linea Pro for iPod Touch 6, etc.)

Infinea Tab and Infinea Tab M laser scanners for iPad users.

(available by special order from barkeepapp.com) Note:

- The Infinea Tab only works with the iPad 7 or later models.
- The Infinea Tab M only works with the iPad Air 4 and 5, and iPad Mini 2 or later models.

See the <u>**Help Section**</u> at <u>barkeepapp.com</u> for details.

Note: Older models of **iPhones**, **iPads** and the **iPod Touch** running an older version of Apple's **iOS** will not support the latest version of BarkeepApp. Older models are no longer capable of syncing with the BarkeepOnline server. Users can continue using BarkeepApp, but for maximum functionality and to take advantage of all BarkeepApp features, we recommend replacing your older **iOS** Device.

System Requirements (cont.)

Etekcity Luminary Nutrition Scale

The **Etekcity Luminary** digital scale is the **Bluetooth** scale that is designed to exclusively work with the latest version of BarkeepApp. The **Etekcity Luminary** digital scale does not require an additional scanner and will work with any **iOS** Device with **Bluetooth LE** capacity.

Note: There are many other models of the **Etekcity Luminary** scales available. <u>Only</u> models purchased via <u>barkeepapp.com</u> are certified to work with BarkeepApp. Other models will not work with BarkeepApp and are <u>not</u> supported by Barkeep. We are not able to provide assistance with or answer questions about scales purchased that are not recommend by Barkeep. Please refer to the <u>Setting up an Etekcity Luminary</u> section of this User Guide for further details.

Note: The Escali SmartConnect digital scale was discontinued by the manufacturer and is no longer available. Users with an existing Escali SmartConnect will still be able to use the scale with BarkeepApp. If you have questions regarding your Escali SmartConnect, contact support@barkeepapp.com

BarkeepOnline

If you are using the latest available version of your web browser, we do not anticipate any issues using BarkeepOnline. Below are specific requirements for common web browsers:

- Chrome 120 or later
- Opera 105 or later
- Firefox 123 or later
- Edge 120 or later
- Safari (desktop) v17.1 or later
- Safari (iOS) v17.1 or later

Notes: No Barkeep software is installed on your PC or Mac.

Tip: Make sure your iOS Software and version of BarkeepApp are up to date.

We recommend keeping your **iOS** Device up to date with the latest version of Apple's **iOS** software. Check your settings (a) to make sure you are running the latest version available. You may need to update Apple's **iOS** software to update to the latest version of BarkeepApp.

Check the App Store 🔥 on your **iOS** Device for the latest BarkeepApp update. There is no additional cost to update BarkeepApp.

Getting Started

Checklist – Before you take your first Inventory...

Please review this list and to make sure your version of Barkeep is ready and set-up correctly:

Install BarkeepApp

BarkeepApp is available from the App Store $\stackrel{\frown}{\leftarrow}$ for \$40.

Multiple Devices?

Can you install BarkeepApp on more than one iOS Device?

Yes, but you <u>must</u> have a BarkeepOnline account subscription to share data between your Devices. We also recommend getting your first **iOS** Device set up and all of your data customized before you sync to additional Devices.

BarkeepApp Settings

In the next pages, you will find an explanation of Barkeep Settings and the options users have to change the default settings.

Setting up Email

If you have a brand-new **iOS** Device, remember to configure the Settings **(S)** to send and receive email. BarkeepApp uses the Mail App **(S)** to send Barkeep Reports to your laptop or desktop computer. You will also need email if you need to contact Barkeep Support.

✓ Customizing your Barkeep

Before you are ready to start an Inventory, you will need to customize and configure your version of Barkeep to fit your business. This includes:

Locations - Setting up the Locations where you store and serve beer, wine and liquor.

Categories - Setting the Categories you use to classify the Items you serve.

Items - Making sure your Items List has all of the Items (the beer, wine and liquor) that you will count and add to Inventories.

The instructions on the following pages will help you prepare to get started so you can begin using Barkeep and take your first Inventory.

Settings

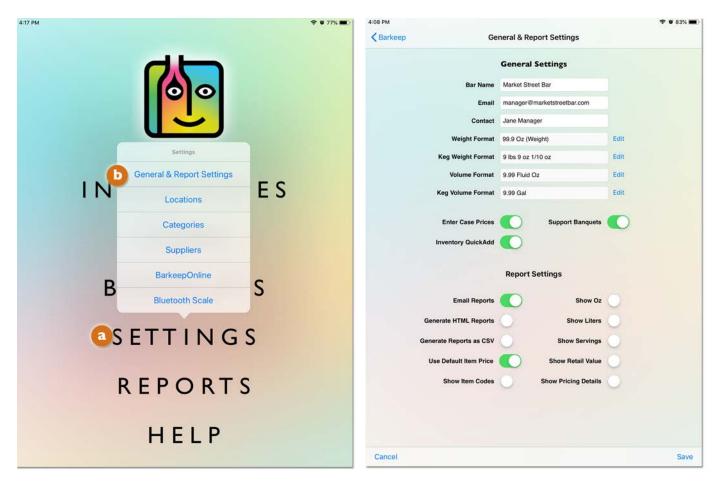
General Settings

We recommend configuring your basic settings before you begin using Barkeep.

It is easy to reconfigure your settings later. After you are more familiar with Barkeep, you may want to adjust your settings to suit your specific needs.

To configure BarkeepApp:

- I. Select "Settings" <a>[0] from the Main Screen.
- 2. Next select General & Report Settings on the pop-up menu.
- 3. Below and on the following pages you'll find descriptions of the different General Settings.



Name, Email and Contact

You will add your Bar/Business Name, Email and Contact Name. The Bar Name is used to customize the reports generated by BarkeepApp, and the email address you enter will be the recipient for all emailed reports. A Contact Name is needed for BarkeepOnline.

You need an Email address for your account

In order to generate a report in BarkeepApp, your **iPad** must be capable of sending email. Please verify that you have set up an email account on your **iPad**. Please double check that you are able to send email using the default **iOS** Mail program before attempting to run a report in BarkeepApp. Simply setting an email address in the General Setting in BarkeepApp is not sufficient to run reports in BarkeepApp – you must also configure an email account on your **iPad**.

Note: If you use a different app for mail on your **iPad** (e.g., Gmail, **M** Outlook, **v** etc.) you still must set up the **iOS** Mail **v** app to email yourself Barkeep reports.

Weight Format and Measurement Settings

The default format is to express weight in ounces (e.g., 99.9 oz). You can press Edit and choose to set BarkeepApp for a pounds and ounces format or for a metric format. A Weight Format will be needed when you enter partial bottle weights during inventories.

If you would like to manually enter partial bottle weights into BarkeepApp, you can use any digital scale to weigh the bottles. Choose the Weight Format in BarkeepApp that matches your digital scale. If you would like to have BarkeepApp automatically detect the weight of partial bottles using **Bluetooth**, you must purchase an approved **Etekcity Luminary** via <u>barkeepapp.com</u>.

4:08 PM		♥ 83%
Barkeep Ge	eneral & Report Settings	
	General Settings	
Bar Name	Market Street Bar	
Email	manager@marketstreetbar.com	
Contact	Jane Manager	
Weight Format	99.9 Oz (Weight)	Edit
Keg Weight Format	9 lbs 9 oz 1/10 oz	Edit
Volume Format	9.99 Fluid Oz	Edit
Keg Volume Format	9.99 Gal	Edit
Enter Case Prices	Support Banquets	
Inventory QuickAdd		
	Report Settings	
Email Reports	Show Oz	0
Generate HTML Reports	Show Liters	0
Generate Reports as CSV	Show Servings	0
Use Default Item Price	Show Retail Value	0
Show Item Codes	Show Pricing Details	0
Cancel		Save

Digital Scale Settings

Keg Weight Format

Weighing kegs requires a different, larger scale. You can also set the appropriate format for the scale you use to weigh kegs. D The default keg weight format is pounds, ounces and 1/10 oz. (e.g., 148 lbs. 3.5 oz.)

Volume Format

If you choose to enter quantities by volume (i.e., fluid oz., gallons, etc.) you can choose separate Volume Formats for bottles and kegs.

Metric Users

Weighing Bottles: When weighing bottles and kegs, Barkeep's default setting is for U.S. weights and measurements (ounces, pounds, etc.). To switch to metric settings (kilograms, grams, etc.), launch BarkeepApp and press "Settings" then General Settings and select a Weight format. There are options for setting BarkeepApp to metric measurements (see above).

Units of Measure: Barkeep supports both United States customary units <u>and</u> the Metric System. For example, Items are listed with the appropriate Size or Units that the product is bottled or packaged in (750 ml, 12 oz., etc.). Some Items may have multiple entries due to different sizes (e.g., 375 ml, 750 ml).

The Etekcity Luminary scale does not require the use of an additional scanner.

See the **<u>Setting up an Etekcity Luminary</u>** section for specific system requirements for digital scale use.

Note: There are many other models of **Bluetooth** digital scales available. Only those purchased via <u>barkeepapp.com</u> are certified to work with BarkeepApp. Other models will not work with BarkeepApp and are <u>not</u> supported by Barkeep. We are not able to provide assistance with or answer questions about scales purchased elsewhere.

🔓 <u>click here</u> — To purchase an Etekcity Luminary scale from Barkeep.

Additional General Settings

Case Price Setting

BarkeepApp is set to allow Case Prices by default. You may turn off this setting if you prefer. For details about using see the section on <u>Case Prices vs. Prices per Bottle</u>.

- Support Banquets
 Use to activate Barkeep's Banquet feature. See the <u>Banquet Settings</u> section for details.

 Inventory Quick Add
- Inventory Quick Add
 Use to activate Quick Add feature. See the <u>Inventories</u> section for details.
- Use Default Item Price
 This setting allows you to manage data in your Usage Reports.

 See the Pricing Items in Inventories section and the Usage Report section for details.
- Show Ounces in Usage Report
 This setting allows you to manage data in your Usage Reports. See the Usage Report section for details.
- Show Pricing Details

This setting allows you to manage data in your Usage Reports. See the <u>Usage Report</u> section for details.

CSV Reports

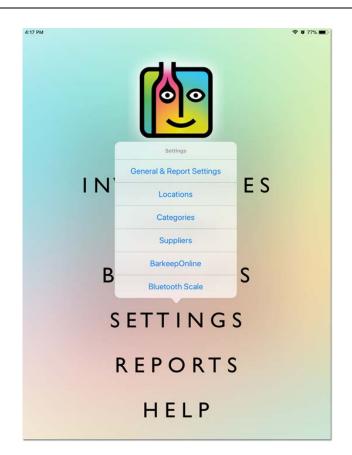
Barkeep's default setting is for all reports to be generated as Excel spreadsheets. If you do not use Excel or are having trouble opening reports, you can generate reports as comma-separated value (CSV) files. There is an option for turning on the setting to generate reports as comma-separated value (CSV) files. CSV files can be opened by various **iOS** apps, Microsoft Excel, Open Office, Apple Numbers, etc. The Reporting section of this User Guide has additional information.

Item Codes in Detail Report

This setting allows you to manage data in your Details Reports. See the **Detail Report** section for details.

Other Settings

- This User Guide has detailed sections about:
 - Categories
 - Locations
 - o BarkeepOnline
 - o Bluetooth Scale
 - Reports
- The <u>Receiving Inventories</u> section has details about managing <u>Suppliers</u> in Barkeep.



Banquet Settings

If you wish to use Barkeep's Banquet features, you must turn on Support Banquets. By default, BarkeepApp does not show the Banquet feature on the Main Screen.

To turn on the Banquet feature and include the Banquet feature in the Main Screen menu:

- I. Select "Settings" from the Main Screen. Next select General Settings.
- 2. On the General Settings screen switch "Support Banquets" 🔕 to the on setting. 🇨
- 3. Press Save on the bottom toolbar 🕑 to save your changes or select to Cancel discard them.
- 4. Banquets will now appear as an option on the Main Screen.

4:08 PM		♥ 83% ■)	5:31 PM 🗢 🖉 60% 🔳 🔿
Barkeep	General & Report Settings		
	General Settings		
Bar Nan	Market Street Bar		
Ema	ill manager@marketstreetbar.com		
Conta	ct Jane Manager		
Weight Form	at 99.9 Oz (Weight)	Edit	
Keg Weight Form	at 9 lbs 9 oz 1/10 oz	Edit	
Volume Forma	at 9.99 Fluid Oz	Edit	
Keg Volume Form	at 9.99 Gal	Edit	INVENTORIES
Enter Case Price			ITEMS
Email Repor	Report Settings		BANQUETS
Generate HTML Repor Generate Reports as CS Use Default Item Pric	Show Servings	0	SETTINGS
Show Item Code		0	REPORTS
Cancel		b Save	HELP

Note: If you want to stop using the Banquet features you can return to General Settings and turn Support Banquets off.

Even if you have disabled the Banquet feature, your Banquet data will be retained on your **iOS** Device per your settings (see next page). With a BarkeepOnline account, your Banquet data remains available on our secure server

For detailed instructions for using the Barkeep's Banquet feature see the **Banquet User Guide**

Data Storage

Your BarkeepApp data is stored locally on your **iOS** Device. By default, your data is stored indefinitely on your Device. To prevent your Device from being filled with older inventories, we recommend you turn on the Auto Delete Inventories option. This will automatically remove Inventories from your **iOS** Device after 365 days from the Inventory Date.

To turn on the Auto Delete feature:

- I. Select "Settings" (a) from the Main Screen. (b) Next select BarkeepOnline.
- 2. On the BarkeepOnline Settings screen, switch "Auto Delete Inventories" 🧿 to the on setting.
- **3.** Press Save on the bottom toolbar **(i)** to save your changes or select to Cancel discard them.

4-17 PM	₹0 // %■	4-10 PM		• • ol% —)
			BarkeepOnline Setup 🕕	
		Username	marketbar	
		Password		
		Sync Automatically		
Settings		Auto Delete Inventories after 1 Year	00	
General & Report Se	ttings		Unregister Device	
I N'	ES		Sync Now	
Categories			Sync Status	
Suppliers				
BarkeepOnline	c			
B Bluetooth Scale	S			
OSETTIN	IGS			
REPOR	TC			
KEPUP				
HEL	D			
neu		Cancel		d _{Save}

Note: When you review your Inventories list on your **iOS** Device, Barkeep will display Inventories from the last 30 days by default. You may see your older Inventories by using the "Show Old Inventories" filter. See the **Filtering** section for details on filtering your Inventories List.

With BarkeepOnline

With a BarkeepOnline account, your older Inventories remain available on our secure server, so there is no reason to keep the older Inventories on your Device.

BarkeepOnline is an add-on, hosted service see <u>barkeepapp.com</u> for more information.

BarkeepOnline subscribers also have their data synced automatically to their BarkeepOnline Account. This is the <u>recommended</u> way to back up your Barkeep data and provides you with added security if your **iOS** Device is ever lost or stolen.

See the **Data Backup** section for more information.

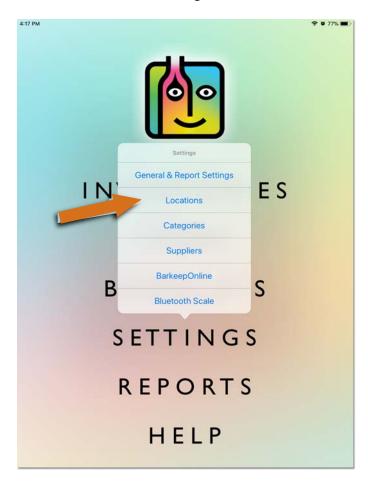
Note: The data in your BarkeepOnline account is stored on Barkeep's secure servers and is <u>never</u> shared with or sold to a third party.

Locations

Barkeep is able to track Inventory and usage by multiple Locations. You may set up just one Location or any number of Locations to suit your business. You can use Locations to track Liquor Usage at specific spots within your bar (i.e., individual bartender stations).

For example, you can have a single Location named "My Bar," or you can have many Locations like "Storage," "Walk-In Cooler," "Well I," "Well 2," "Well 3," "Patio Bar," etc.

By default, Barkeep creates two Locations named "Storage" and "Bar." We recommend starting with a small number of Locations and adding to them as needed.



Adding a new Location

To add a new Location:

4:10 PM

- I. Select "Settings" from the Main Screen. Next select Locations.
- Select the + icon on the bottom toolbar
 of the Locations screen.
- **3.** Enter a unique name **b** for your Location and press **Done**. **C**
- **4.** Press Save on the bottom toolbar **d** to save your new Location or select Cancel to discard it.

	/ Parkaan	Locations	
	Barkeep Bar 1	Locations	
	Bar 2		
	Bar 3		
ſ	Cart		
	Green Lounge		
n	Oceanview Ballroom		
	Oceanview Veranda		
	Patio Lounge		
to	Store Room		
to	Walk-in Cooler		
	Cancel	a +	Save
🗢 🖉 81% 🔳 🗎	4:11 PM		
			🗢 🖲 80% 🔳
	< Barkeep	Locations	♥ 0 80% ■
	Karkeep Bar 1	Locations	♥ ● 80% ■
		Locations	* 0 80%
	Bar 1	Locations	≪ 0 80% ■
	Bar 1 Bar 2	Locations	 ♥ 0 80%
	Bar 1 Bar 2 Bar 3	Locations	 ✓ ● 80%
	Bar 1 Bar 2 Bar 3 Cart	Locations	* • sox.
	Bar 1 Bar 2 Bar 3 Cart Green Lounge	Locations	* • sox =
	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine	Locations	* • sox =
	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom	Locations	
	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom Oceanview Veranda	Locations	
	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom Oceanview Veranda Patio Lounge	Locations	
	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom Oceanview Veranda Patio Lounge Store Room	Locations	
	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom Oceanview Veranda Patio Lounge Store Room	Locations	
	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom Oceanview Veranda Patio Lounge Store Room	Locations	
	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom Oceanview Veranda Patio Lounge Store Room	Locations	
	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom Oceanview Veranda Patio Lounge Store Room	Locations	
	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom Oceanview Veranda Patio Lounge Store Room	Locations	
	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom Oceanview Veranda Patio Lounge Store Room		
Done	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom Oceanview Veranda Patio Lounge Store Room	Locations	
Done	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom Oceanview Veranda Patio Lounge Store Room	Locations	
	Bar 1 Bar 2 Bar 3 Cart Green Lounge Mezzanine Oceanview Ballroom Oceanview Veranda Patio Lounge Store Room		

Bar 1																			
Bar 2																			
Bar 3																			
Cart																			
Green I	Loung	ge		_															
New L	ocati	on		b											0				
Ocean	view I	Ballr	oon	1															
Ocean	view \	Vera	nda																
Patio L	oung	e																	
Store R	loom																		
Walk-ir	n Coo	ler																	
Walk-ir	n Coo	ler																	
Walk-ir	n Coo	ler																	
Walk-ir	n Coo	ler																	
Walk-ir	n Coo	ler																	
Walk-ir	n Coo	ler																	
Walk-ir	2 W	ler	e e		4 r		5 t		y		7 U		8		9.0		p	<	×
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q	2	ļ						g		h		j	⁸ i m	k					

Modifying an Existing Location

To rename or modify an existing Location:

- I. Go to "Settings" and select Locations.
- 2. On the Locations screen press the name <a>[a] of the Location that you'd like to change.
- 3. This will activate the keyboard and take you to that Location's name field.
- **4.** Edit the Location name **b** and press **b**.
- 5. Press Save on the bottom toolbar 🖸 to save your changes or select Cancel to discard them.

The example below shows renaming the Location Mezzanine to Club Bar.

4:11 PM		🗢 🖉 80% 🔳	4:12 PM		🗢 🛛 79% 🔳
Keep	Locations		Barkeep	Locations	
Bar 1			Bar 1		
Bar 2			Bar 2		
Bar 3			Bar 3		
Cart			Cart		
Green Lounge		<	Club Bar		
Mezzanine a	0		Green Lounge		
Oceanview Ballroom			Oceanview Ballroom		
Oceanview Veranda			Oceanview Veranda		
Patio Lounge			Patio Lounge		
Store Room			Store Room		
Walk-in Cooler			Walk-in Cooler		
1 2 3 4 5 q w e r t		p 🗵			
a s d f g		Done			
	b n m ! ?	Ŷ			
.7123	.7123	, in the second se	Cancel	+	G Save

Deleting a Location

To delete a Location:

- I. Go to "Settings" and select Locations.
- 2. Slide your finger along the Location name (e.g., Club Bar) and a red Delete button will appear.
- **3.** Press the Delete button.
- 4. Press Save on the bottom toolbar (2) to save your changes or select Cancel to discard them.

4:12 PM		🗢 🛛 79% 🔳)	4:12 PM		🗢 🛛 81% 🔳)
Barkeep	Locations		K Barkeep	Locations	
Bar 1			Bar 1		
Bar 2			Bar 2		
Bar 3			Bar 3		
Cart			Cart		
ar		Delete	Green Lounge		
Green Lounge			Oceanview Ballroom		
Oceanview Ballroom			Oceanview Veranda		
Oceanview Veranda			Patio Lounge		
Patio Lounge			Store Room		
Store Room			Walk-in Cooler		
Walk-in Cooler					
Cancel	+	Save	Cancel	+	a Save

Note: If you delete a Location that is used in an existing Inventory, the Items that have been added to the deleted Location will show up with a blank Location name. You can move those Items to a different Location or leave them with a blank Location name.

Categories

Categories are used to organize Items into logical groupings and help users run more effective Reports. Every Item in Barkeep should be assigned to a Category. Barkeep uses a system of Nested Categories where users can customize and "layer" their Categories.

Barkeep has been set up with some basic default Categories. You may begin using Barkeep now and return later to customize Categories to suit your needs. The Categories in Barkeep are fully customizable. You can create as many Categories as you need. For example, if you specialize in Wine and want to track usage by each varietal you can create a Category named "Wine" which contains fifty different Categories of Wine.

How do I choose and assign Categories?

If you already have a way that you have categorized all of your Items that works well for you, we recommend that you keep using that set of Categories. Also, if you have a POS System you would want to set your Barkeep Categories in a way that is <u>very</u> similar to how your POS System is organized. It is crucial to make sure that the Categories you define in Barkeep can be exactly matched to the Categories you use in your Sales Data – otherwise it will be impossible for BarkeepOnline to generate meaningful Variance or Pour Cost Reports.

Getting Started with Categories

To manage your Categories:

- I. Select Settings 🙆 and then Categories 🕒 in the pop-up menu.
- 2. This will take you to the Categories screen, which shows you a list of all your existing Categories. The example below shows Barkeep's default Categories which are explained on the **next page**.

4:17 PM	♥ 77% ■)	4:16 PM		🗢 🖉 78% 🔳)
		Keep	Categories	
		Beer		
		Domestic Bottled Beer		
		Domestic Draft Beer		
		Premium Bottled Beer		
		Premium Draft Beer		
Settings.		Liquor		
General & Report Settings	FC	Call Liquor		
IN'	ES	Premium Liquor		
Categories		Well Liquor		
		Non-Alcoholic		
Suppliers		Wine		
BarkeepOnline	~	House Champagne		
BIuetooth Scale	S	House Wine		
		Premium Chanmpagne		
OS ETTIN G	S	Premium Wine		
O E I I I I I I I	•			
	~			
REPORT	S			
HELP				
		Cancel	+	Save

Default Categories

Barkeep has been set up with the following default Categories.

Beer	Domestic Bottled Beer Domestic Draft Beer Premium Bottled Beer
	Premium Draft Beer
Liquor	Well Liquor
	Call Liquor
	Premium Liquor
Wine	House Wine
	Premium Wine
	House Champagne
	Premium Champagne
Non-Alcoholic	

Starting with Barkeep Defaults

Because it is easy to change Categories later, we recommend that you get started with a fairly simple, basic configuration. After your first Inventory, you'll have a better understanding of your usage when you start running Barkeep Reports and are ready to narrow down on specific issues.

To start adding and modifying your Categories see the **Adding Categories** section.

Why Categories Matter

When you use BarkeepOnline¹ to upload Sales Data from your POS System, you will need to set up Barkeep Sales Items that correspond to each Sales Items in your POS System.

When your POS System uses Sales Items that specify certain Items (products) you would match them to Sales Items in BarkeepOnline. A POS System with a Sales Item like **Tanqueray G&T** would have a corresponding Barkeep Sales Item **Tanqueray G&T**. In Barkeep, you will need to add a Recipe for the amount of **Tanqueray** you use for that cocktail (e.g., 2 oz.). In BarkeepOnline, when you run a Variance Report, you would be able to compare your Sales Data for **Tanqueray** to your actual usage based on Inventories.

With a more generalized POS System, say with a Sales Item like **Call G&T** where the gin used could be **Tanqueray**, **Grey Goose** or **Beefeater** you will only be able to compare Sales Data and Actual Usage at a Category level and not the Item Level. For example, a Category like **Call Liquor** or **Call Gin**.

continue to next page for some Category examples

¹ Uploading Sales Data Requires a BarkeepOnline account and subscription.

A Nested Categories Example

Below is an example of how you might organize your beer. Instead of separate Categories like **Beer**, **Bottled Beer**, **Premium Beer**, etc. For example, you might set up your Categories like this:

- Beer
 - o Bottled Beer
 - o Cider
 - o Cider
 - Bottled Cider
 - Draft Cider
 - Domestic Bottled Beer
 - o Domestic Draft Beer
 - Imported Bottled Beer
 - Premium Bottled Beer
 - o Draft Beer
 - Premium Draft Beer
 - Specialty Draft Beer

4:12 PM		🗢 🛛 79% 🔳
K Barkeep	Categories	
Beer		
Bottle Beer		
Cider		
Bottled Cider		
Draft Cider		
Domestic Bottled Beer		
Domestic Draft Beer		
Imported Bottled Beer		
Premium Domestic Beer		
Premium Draft Beer		
Specialty Draft Beer		
Liquor		
Call Liquor		
Aperitif		
Call Gin		
Call Rum		
Call Vodka		
Call Whiskey		
Premium Liquor		
Single Serve Cocktail		
Well Liquor		
Cancel	+	Save

You can assign an Item to any <u>one</u> Category, and when you run your Reports you will see your Categories and subtotals organized in a way that reflects how you organize the products you serve.

In the example above you would assign Items such as **Budweiser Bottle** and **Rolling Rock** to the **Domestic Bottled Beer** Category. **Budweiser Draft** would be assigned to **Domestic Draft Beer** but **Sierra Nevada Keg** could be under **Specialty Draft Beer**. Most of your imported bottled beer would be in the **Imported Bottle Beer** Category (e.g., **Heineken**, **Corona**, **Molson**) but if you carry a large selection of German and Belgian beers you could have separate Categories for those under **Imported Bottle Beer**. If your served specialty craft beers and local microbrews you could also create additional Categories as needed.

POS Systems with single keys for a Brand Family

Detailed POS Systems typically are configured with separate keys for every Item (product). Occasionally some POS systems have keys that are just for a brand family like **Bacardi**, **Gallo Wine** or **Absolut** without specific keys for different varieties (e.g., **Absolut Citron**, **Absolut Vanilla**, etc.). When a POS System does not have specific keys for each Item, it will not be possible to review those products at the Item level in BarkeepOnline's Variance Report and Pour Cost Report.

If your POS System is set up with less-specific keys that cover brand families, we recommend a nested Category for that brand.

An Absolut Example

The example below shows a scenario where the POS System only has a single key for cocktails using **Absolut**. There are not separate keys for all the varieties of **Absolut**.

- In the first sample Variance Report, <a>2 the Variance Details show that the Used and Ideal Used amounts in the Category Call Vodka are the same. The usage based on your Inventories and the expected usage based on sales totals matches. The numbers also match for specific Items like Skyy Vodka and Stoli 80 prf.
- The POS System is set up with one key for **Absolut** and the Barkeep Sales Item has a Recipe specifying 2 oz. of **Absolut**. Because <u>any</u> variety of **Absolut** might be used for the **Absolut Cocktail** Sales Item, the Used and Ideal Used amounts for all the varieties of **Absolut** do not match.
- In the second sample Variance Report, there now is a Category called **Absolut Products**. The Recipe for the Sales Item **Absolut Cocktail** does not specify a specific Item (variety of **Absolut**), but it is does specify 2 oz. from any Item in the **Absolut Products** Category.

If you have keys for a brand family in a POS System, a brand-specific Category will result in more effective Reports.

Liquor			5:00 PM	1	🗢 🛛 65% 🔳 🖯
Call Liquor			Barkeep	Categories	
Call Vodka			Barkeep	Categories	
Absolut	\$2,315.00	9.7	Aperitif		
Absolut Citron Vodka	\$0.00	3	Beer		
Absolut Mandarin Vodka	\$0.00	4.2			
Absolut Peach Vodka	\$0.00	0.1	Beer (non-alcoholic)		
Absolut Pear Vodka	\$0.00	1	Cider		
Absolut Vanilla Vodka	\$0.00	2.5			
Skyy Vodka	\$420.00	3.5	Bottled Cider		
Stoli 80 prf	\$650.00	4.6	Draft Cider		
Total Call Vodka	\$3,385.00	28.6	Domestic Bottled Beer		
Liquor		_	Domestic Draft Beer		
Call Liquor			Imported Bottled Beer		
Call Vodka			Imported Bottled Beer		
Absolut Products			Premium Domestic Beer		
Absolut	\$0.00	9.7	Craft Beer		
Absolut Citron Vodka	\$0.00	3			
Absolut Mandarin Vodka	\$0.00	4.2	Premium Draft Beer		
Absolut Peach Vodka	\$0.00	0.1	Seasonal Beer		
Absolut Pear Vodka	\$0.00	1	Specialty Draft Beer		
Absolut Vanilla Vodka	\$0.00	2.5	_ Specially Drait Beel		
All Items	\$2,8 00	0	Call Gin		
Total Absolut Products	\$2,812.00	20.5	Call Rum		
Skyy Vodka	\$420.00	3.5			
Stoli 80 prf	\$650.00	2.6	Call Vodka		
Total Call Vodka	\$3,882.00	28.6	Absolut Products		
			Call Whiskey		
			Liquor		
			Premium Liquor		
			Cancel	· · +	Save

For more about BarkeepOnline Report features, see the **BarkeepOnline User Guide**.

Adding Categories

In this example, you add a new Category called **Craft Beer** to separate out some of the local microbrews you serve. You will use nested Categories to place the Category in the **Premium Draft Beer** Category.

Tip - Use Unique Names: When you create Categories, we suggest using unique names. For example, if you wanted a **Vodka** Category nested in both **Call Liquor** and **Premium Liquor**, do <u>not</u> create two Categories called **Vodka**. Instead, we would suggest naming those two Categories something like **Call Vodka** and **Premium Vodka** to avoid confusion managing your data and reading Barkeep reports.

To add a new Category:

- I. Select the \pm icon (a) on the bottom toolbar of the Categories screen.
- 2. A new Category details screen will appear. 🕒
- 3. Press the name field () to activate the keyboard and enter a name for the new Category in the name field and then press . C

4:12 PM		🗢 🛛 79% 🔳)	4:21 PM							4	74%
Barkeep	Categories		K Barkeep		С	ategori	es				
Beer			Beer								
Bottle Beer			Beer (non-alcoholic)			t Categ	b				
Cider			Bottle Beer	*Name	Craft	Beer		٢			
Bottled Cider			Cider	Parent	Paren	t Categ	ory	EDIT			
Draft Cider			Bottled Cider	Default \$	Serving P	rice C	0.00				
Domestic Bottled Beer			Draft Cider	Default	Serving S	Size 0	Default	Serving			
Domestic Draft Beer			Domestic Bottled Be	Serving	Units	1	ml	oz each			
Imported Bottled Beer			Domestic Draft Beer								
Premium Domestic Beer			Imported Bottled Be								
Premium Draft Beer			Premium Domestic E								
Specialty Draft Beer			Premium Draft Beer	Cancel		1		Sa	ve		
Liquor			Specialty Draft Beer								
Call Liquor			Liquor								
Aperitif			Call Liquor								
Call Gin			Aneritif								
Call Rum			5 ୯ ୩								
Call Vodka			q w e	r	t	6 y	u u	i	9	p	\otimes
Call Whiskey				3 8	1.		1				Danse
Premium Liquor			as	d f	g	Ľ		j k		C	Done
Single Serve Cocktail			☆ z x	c	v	b	n	m	;	?	Ŷ
Well Liquor Cancel	+0	Save	.?123 🙄 🖉						.?1	23	Ű

continue to next page to add more details

Adding Categories (cont.)

- 4. You can choose a Parent Category (this is optional). Press the 💷 button.
- 5. Select a Parent Category e and press Save on the bottom toolbar to save your choice or select Cancel to discard it.

4:21 PM		🗢 🛛 74% 🔳	4:22 PM		🗢 🛛 74% 🔳)
< Barkeep	Categories		≺ Barkeep	Categories	
Beer			Beer	Select a Category	
Beer (non-alcoholic)	Edit Category		Beer (non-alcoholic)	Cider	
Bottle Beer	*Name Craft Beer		Bottle Beer	Bottled Cider	
Cider	Parent Parent Category 0		Cider	Draft Cider	
Bottled Cider	Default Serving Price 0.00		Bottled Cider	Domestic Bottled Beer	
Draft Cider	Default Serving Size Default Serving		Draft Cider	Domestic Draft Beer	
Domestic Bottled Be	Serving Units mi oz each		Domestic Bottled Be	Imported Bottled Beer	
Domestic Draft Beer			Domestic Draft Beer	Premium Domestic Beer 🗸	
Imported Bottled Be			Imported Bottled Be	Premium Draft Beer	
Premium Domestic E			Premium Domestic E	Specialty Draft Beer	
Premium Draft Beer	Cancel 🚺 Save		Premium Draft Beer	Cancel Cancel Save	
Specialty Draft Beer			Specialty Draft Beer		
Liquor			Liquor		
Call Liquor			Call Liquor		
Aneritif			Aperitif		
5 C 1			Call Gin		
q w e			Call Rum		
			Call Vodka		
a s	d f g h j k l	Done	Absolut Products		
☆ z x	cvbnm [!] ?	Ŷ	Call Whiskey		
.7123 😄 👰	.?123		Premium Liquor		
	.7123		Cancel	+	Save

- There is additional information you can add to your Category
 if needed.
- 7. In this example, as you always sell the beer in this Category by the pint, you have entered 16 ounces for the default serving size. Select ounces for the Serving Units.
- 8. The final step is to press Save on the bottom toolbar 😢 to save your Category or select Cancel to discard your changes.

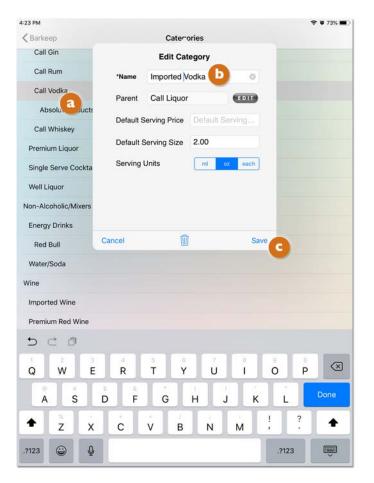
EDIT
-
each

Editing Categories

To edit or add information to a Category:

- I. Go to the Categories screen. Select the Category <a>[0] that you'd like to modify.
- 2. This will take you to the Edit Category screen for that Category.
- 3. To edit the name, press the name text field 🕒 and activate the keyboard.
- **4.** When you are done making changes, press Done
- 5. You can add or select a different the Parent Category by pressing the use button. If you wish to remove the Parent Category, you can uncheck it and press Save on the bottom toolbar. Without a Parent Category, the Category will now appear at the top level of the Categories List.
- 6. You can also change Default Serving Size, Serving Units, etc.
- 7. Press Save C on the bottom toolbar to save your changes or select Cancel to discard them.

The example below shows renaming the Category from Call Vodka to Imported Vodka. All of your Items in the Call Vodka Category will now be in the Imported Vodka Category.



Deleting Categories

Please read before you delete!

Read this section <u>before</u> you delete any Categories in order to understand how Barkeep manages your data. When you delete a Category, the action is permanent. If you delete a Category by mistake and save your changes, you will not be able to recover your Category. Instead, you will have to create a new Category with the same name and then reassign Items to that new Category.

Are Items deleted when I delete their Category?

No! Deleting a Category will only remove the Category selection from any Items that are currently in the Category. This will <u>not</u> delete the Items. These Items will appear in your Reports with a Category named "None" until you edit the Item(s) and select new Categories for them.

How to Delete a Category

There are two methods for deleting a Category:

- I. Go to the Categories screen.
 - **2a.** Slide your finger along the Category name you would like to delete.

A red Delete button will appear. ⓐ After you press Delete an action menu will appear.

Press Delete to confirm you would like to delete the Category D or press Cancel to keep it.

2b. An alternative method is to press the *income to be a set of the experimentation is to press the income to be a set of the experimentation is to be a set of the experimentation of the experimentation*

After you press 🔟 an action menu will appear.

Press Delete to confirm you would like to delete the Category **O** or press Cancel to keep it

- 3. After you press Delete, you will return to the Categories screen.
- **4.** Press Save on the bottom toolbar **(e)** to confirm your deletion or select Cancel to undo the change.

4:23 PM	🗢 🛛 72% 🔳)	4:24 PM		? 0 72% 🔳
Barkeep	Categories	< Barkeep	Categories	
Beer		Seasonal Beer		
Beer (non-alcoholic)		Specialty Draft Beer	Edit Ostanovi	
Cider		Liquor	Edit Category	
Bottled Cider		Call Liquor	*Name Seasonal Beer	
Draft Cider		Aperitif	Parent Beer	
Domestic Bottled Beer		Call Gin	Default Serving Price Default Serving	
Domestic Draft Beer		Call Rum	Default Serving Size 1.00	
Imported Bottled Beer	Delete Category Deleting a Category removes it from existing items. Are you sure you want	Call Vodka	Serving Units mi oz each	
Premium Domestic Beer	to delete this Category?	Absolut Products		
Craft Beer	Cancel Delete	Call Whiskey		
Premium Draft Beer		Premium Liquor		
nal Beer	a Delete	Single Serve Cockta	Cancel C 🗊 Save	
Specialty Draft Beer		Well Liquor		
Liquor		Non-Alcoholic/Mixers	Delete Category Deleting a Category removes it from	
Call Liquor		Energy Drinks	existing Items. Are you sure you want to delete this Category?	
Aperitif		Red Bull	Cancel Delete	
Call Gin		Water/Soda		
Call Rum		Wine		
Call Vodka		Imported Wine		
Absolut Products		Premium Red Wine		
Call Whiskey		Premium White Wine		
Cancel	+ e save	Cancel	+	e Save

What happens if the deleted Category was also a Parent Category?

- When you delete a Category that was also used as Parent Category, only that Category will be deleted.
- The Categories that were "nested" in the Category remain.
- Those Categories will be moved to the top level.
- But, if those Categories that move up to the top level have Categories nested in them, those nests will remain intact.

This example below illustrates how Barkeep manages Categories when you delete a parent Category:

- In this example, a Call Liquor Category is nested in the Category Liquor.
- A Call Vodka Category is nested in Call Liquor.
- Because a wide variety of Absolut products are offered, there is even an Absolut Products Category b in the Call Vodka Category.
- When the Category Call Liquor is deleted C the Categories Call Vodka, Call Gin and Call Whiskey are all moved 1 to the top level in the Categories List.
- But notice that the Category Absolut Products 일 remains nested in Call Vodka.

4:24 PM		👻 🛡 72% 🔳 🔿	5:00 PM		🗢 🛛 65% 🔳 🗎
Keep	Categories		Barkeep	Categories	
Beer			Aperitif		
Beer (non-alcoholic)			Beer		
Cider			Beer (non-alcoholic)		
Bottled Cider			Cider		
Draft Cider			Bottled Cider		
Domestic Bottled Beer			Draft Cider		
Domestic Draft Beer			Domestic Bottled Beer		
Imported Bottled Beer			Domestic Draft Beer		
Premium Domestic Beer			Imported Bottled Beer		
Craft Beer			Premium Domestic Beer		
Premium Draft Beer			Craft Beer		
Seasonal Beer			Premium Draft Beer		
Specialty Draft Beer			Seasonal Beer		
Liquor			Specialty Draft Beer		
quor a		C Delete	Call Gin		
Aperitif			Call Rum		
Call Gin			Call Vodka		
Call Rum			Absolut Products		
Call Vodka			Call Whiskey		
Absolut Products			Liquor		
Call Whiskey			Premium Liquor		
Cancel	+	Save	Cancel	+	Save

Barkeep Tip: When you review your Items List and select **By Category**, Barkeep will display your Items without Categories at the top of the list. You can select each Item and add a Category.

1:05 PM			4	r o 100% 🚥
Barkeep	Items			
٩				Cance
Alphabetical		By C	ategory	
No Category			-	
PERNOD - PERNOD FILS 750 ml Bottles				
Samuel Adams Boston La 12 oz Bottles	ager Singles 12 Oz L	ong Neck Bottle		
Beer : Beer (non-alcoh	olic)			
Clausthaler N-A 12 oz Bottles				
O'Doul's Amber 12 oz Bottles				
Beer : Cider : Bottled C	ider			
Angry Orchard Crisp App 12 oz Bottles	ble			
Wyder's Pear Cider 12 oz Bottles				
Beer : Cider : Draft Cide	er			
Wyder's Draft Pear Cider 15.5 Gallon Kegs				
Beer : Domestic Bottled	d Beer			
Amstel Light 12 oz Bottles				
Anchor Steam Beer 12 oz Bottles				
Anchor Steam Singles 22 22 oz Bottles	2 Oz Bottle			
Rud Light Cancel Batch Items	rħ Fi	lter 💽		Done

Changing and Reassigning Parent Categories

After you have deleted a Parent Category you can edit any of the Categories that were moved to the top level and reassign them to a new Parent Category. For example, if you wanted to nest **Russian Vodka** under the Category **Call Liquor**. When you add a Parent Category to Category, any Categories nested in that Category move with it. For example, if you were to reassign **Swedish Vodka** to **Call Liquor**, then the **Absolut Products** Category would remain under **Swedish Vodka**.

Categories with older versions of BarkeepApp

Note: If you are a new user to BarkeepApp using version 6 or later, skip ahead to the next section.

Does BarkeepApp still have Category Groups?

No. BarkeepApp 5.2 introduced Nested Categories in place of Category Groups and Categories. Nested Categories allows users greater flexibility to manage the Items they track in Barkeep.

What happened to my Category Groups?

When you upgrade to BarkeepApp 5.2 or later your Category Groups are automatically converted to Categories. The Categories in each former Category Group are now Parent Categories nested in the converted Categories.

Before BarkeepApp 5.2

BarkeepApp 5.2 and later

Pad 🛜	4:16 PM	Ø 🕏 89% 📖	5:00 PM		🗢 ö 65% 🔳
< Barkeep	Categories		Barkeep	Categories	
Categories	at	eg Groups	Aperitif		
BEER	4	0	Beer		
Domestic Bottled Beer			Beer (non-alcoholic)		
Domestic Draft Beer			Cider		
Imported Bottled Beer			Bottled Cider		
Premium Champagne			Draft Cider		
Premium Domestic Beer			Domestic Bottled Beer		
Premium Draft Beer			Domestic Draft Beer		
Specialty Draft Beer			Imported Bottled Beer		
LIQUOR			Premium Domestic Beer		
Call Liquor			Craft Beer		
Premium Liquor			Premium Draft Beer		
Well Liquor			Seasonal Beer		
NON-ALCOHOLIC/MIXERS			Specialty Draft Beer		
Non-Alcoholic			Call Gin		
WINE			Call Rum		
House Champagne			Call Vodka		
House Wine			Absolut Products		
Premium Wine			Call Whiskey		
Premiun Champagne			Liquor		
			Premium Liquor		
Cancel	+	Save	Cancel	+	Save

How do I get the Nested Categories feature?

You need to upgrade the latest version of BarkeepApp. Only with BarkeepApp 5.2 or later will you be able to take full advantage of Barkeep's new Category Management Feature with nested Categories.

Check the App Store $\stackrel{\scriptstyle{\frown}}{\leftarrow}$ on your **iOS** Device for the latest update.

Note: Before you update your BarkeepApp software you may need to upgrade the Mac **iOS** Software on your **iPhone**, **iPad** or **iPod Touch**. See settings in your **iOS** Device.

What if my older iOS Device cannot upgrade to the latest version of BarkeepApp?

You can still use older versions of BarkeepApp. If you need instructions for setting up Category Groups and Categories see the <u>Classic iPad User Guide</u> or contact Barkeep support at

support@barkeepapp.com

Categories with older versions of BarkeepApp (cont.)

BarkeepOnline and Categories

BarkeepOnline no longer shows Category Groups and now features Nested Categories the same as BarkeepApp.

Can I use an older iOS Device with BarkeepOnline?

Yes. If you are a BarkeepOnline user using BarkeepApp in an older **iOS** Device, you will see nested Categories when you log in to your BarkeepOnline account but your version of BarkeepApp will still display Category Groups and Categories (see below).

	BarkeepApp BarkeepOnline	iPad ♥ C Barkeep	4:16 PM Categories	0 * 89% 🚥
	Done	categories		Category Groups
Barleon	Categories Add Category	BEER		
Barkeep		Domestic Bottled Beer		
Admin	Name Parent Category	Domestic Draft Beer		
Home	💥 Beer	Imported Bottled Beer		
Inventories	Comestic Draft Beer Beer	Premium Champagne		
Items	Y Premium Draft Beer Beer	 Premium Domestic Beer 		
Banquets	Comestic Bottled Beer Beer	 Premium Draft Beer 		
Sales	X Imported Bottled Beer Beer	 Specialty Draft Beer 		
Orders	Premium Domestic Beer Beer	LIQUOR		
Reports	Specialty Draft Beer Beer	Call Liquor Premium Liquor		
Settings	💥 Liquor	Well Liquor		
Help	💥 Call Liquor Liquor	NON-ALCOHOLIC/MIXERS		
Sign Off	💥 Premium Liquor Liquor	Non-Alcoholic		
	💥 Well Liquor Liquor	WINE		
		House Champagne		
		House Wine		
		Premium Wine		
		Premiun Champagne		
		Cancel	+	Save

What if I have multiple devices registered to my BarkeepOnline account?

If you have more than one **iOS** Device with a BarkeepOnline account and some have the current version of BarkeepApp with nested Categories on the new Device and have an older version of BarkeepApp on an older Device — BarkeepApp will still work. We would recommend using the older **iOS** Device(s) only for adding Items to Inventories. Use your **iOS** Device(s) with the latest version of BarkeepApp for adding and modifying Categories.

If you have additional questions regarding using an older version of BarkeepApp with BarkeepOnline, see the **BarkeepOnline User Guide** for more details.

Items

Barkeep defines Items as the products that you purchase from distributors and keep in Inventory (e.g., bottles and cases of **Absolut Vodka** and kegs and cases of **Budweiser**, etc.).

Pre-Installed/Default Items

BarkeepApp is automatically installed with a set of standard Items that are commonly used in most bars – like **Absolut Vodka** and **Budweiser Beer**. We want to keep the number of Items that is installed on your **iPhone**, **iPod Touch** or **iPad** as small as possible. This will make it easier for you to navigate through the Items List as you are taking Inventory.

However, you are not limited to the set of default Items (see below). Barkeep has a database of over 75,000 wine, beer and liquor products that are maintained on the Barkeep Server. They can be added to your Items List. You can add as many Items as you'd like.

10:29 AM 🗢 🕫 77% 🖿	10:30 AM	국 전 77% 🔳)
		ms
	Q	Cancel
		By Category
	Barton California Brandy 1 Liter Bottles	6
	Barton Gin 1 Liter Bottles	
	Barton Gold Rum 1 Liter Bottles	۲
INVENTORIES	Barton Light Rum 1 Liter Bottles	•
TINVEINT ORTES	Barton Reserve Whiskey 1 Liter Bottles	٢
ITEMS	Barton Triple Sec 1 Liter Bottles	9
IT LITS	Barton Vodka 1 Liter Bottles	6
SETTINGS	Becks 12 oz Bottles	9
	Becks Dark Singles 12 Oz Bottle 12 oz Bottles	9
REPORTS	Beefeater Dry Gin 1 Liter Bottles	۲
	Benedictine 1 Liter Bottles	۲
HELP	Blackstone Cabernet Sauvginon 750 ml Bottles	۹
	Blue Angel 1 Liter Bottles	۹
	BLUE CURACAO - BOLS 750 ml Bottles	٢
	Cancel Batch Items 🔆 📋	Filter 🗐 🕂 Done

Note: If you do not carry the product, you can delete any default Items from Items List. You can re-add the Items, if needed, by following the steps on the following pages.

* Instructions for using Batch Items can be found in the **Batch Items User Guide**.

Adding New Items

There are three options for adding new, additional Items to your list that you do not find in the default set:

There are four options for adding new, additional Items to your list that you do not find in the default set:

- **Scanning** Scan Barcodes and search the Barkeep Server's database to find the Item add to your List.
- **Searching** Search the Barkeep Server's database by name and find over 75,000 products you can add to your Items List.
- **Copying** Make a copy of an existing Item and then modify it.
- **Manually** If you cannot find the Item(s) in our database, you can manually create a new Item.

What if I deleted an Item and need to re-add it?

If you wish to re-add Items you have deleted, you will take the same steps used for adding new Items. See the section **Deactivating and Deleting Items** for more details.

Is it possible to import Items from a Spreadsheet?

Yes. If you already have a detailed spreadsheet of Items (products) we might be able to import the data. This could be a spreadsheet exported from the current system you use, or it could be a spreadsheet you created on your own. The spreadsheet should have columns for names and ideally other Item Properties such as Size, Container Type, Price, and even Category, Supplier and Serving Price. See **Item Properties** for the sort of information you will need to assign to each Item in Barkeep.

How does it work?

The feature is <u>only</u> available after you have set up a BarkeepOnline account. You can email the spreadsheet to us at <u>support@barkeepapp.com</u> After we review the spreadsheet, we will get back to you. Our support team will upload the data to your BarkeepOnline account. Your Items will then sync to your **iOS** Device(s) that is registered with your account. You will still need to review each Item carefully and may need to add more details. But, if you have a large list of Items, this might be a more efficient way to get started.

Please note, we can upload a spreadsheet one time for an account. In the future, if you add any new Items, you will be responsible for adding them yourself using the steps on the following pages.

continue to next page for detailed instructions

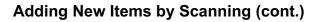
Adding New Items by Scanning

One of the easiest ways to add a new Item is by scanning the barcode using your **iPad's** camera or an attached **Infinea Tab** scanner. After scanning the barcode, BarkeepApp can search the Barkeep Database. If found, the Item is added to your Items List. We recommend scanning and/or searching the Barkeep Database before entering a new Item manually.

To begin adding Items by scanning, select "Items" to go to the Items screen:

- I. On the bottom toolbar ^(a) of the Item screen, the scan icon to activate your **iPad's** camera or **Infinea Tab** scanner and scan the barcode. ^(b)
- 2. After the barcode is scanned a pop-up menu will give you three choices.
- 3. Select Search Barkeep.

0:04 AM		🗢 100% 🔳	10:04 AM		হ 100% 🔳
Keep	Items		K Barkeep	Items	
٩		Cancel	Q		Canto
Alphabetical	By Cat	igory	Alphabetical	By Cat	legory
Absolut 1 Liter Bottles			Absolut 1 Liter Bottles		
750 10 11	And a second sec		Absolut 750 ml Bottles		
Absolut Citron Voc 1 Liter Bottles			Absolut Citron Vodka 1 Liter Bottles		
Absolut Grapefruit	Auto Add 1 Bottle		Absolut Grapefruit 1 Liter Bottles		
Absolut Mandarin 1 Liter Bottles	Done		Absolut Mandarin Vodka 1 Liter Bottles		
Absolut Pear Vodka 1 Liter Bottles			Absolut Pear Vodka 1 Liter Bottles		
Absolut Vanilla Vodka 1 Liter Bottles			Absolut Vanilla Vodka 1 Liter Bottles		
Amaretto Di Gaetano 1 Liter Bottles			Amaretto Di Gaetano 1 Liter Bottles		
Amstel Light 12 oz Bottles			Amstel Light 12 oz Bottles		
Anchor Steam Beer 12 oz Bottles			Anchor Steam Beer 12 oz Bottles		
Anchor Steam Singles 22 Oz Bo 22 oz Bottles	ottle		Anchor Steam Singles 2 22 oz Bottles	New Barcode Scanned	
Angostura 1919 750 ml Bottles			Angostura 1919 750 ml Bottles	C Search Barkeep	
Angry Orchard Crisp Apple 12 oz Bottles			Angry Orchard Crisp Ap 12 oz Bottles	Create New Item Manually	
Arrow Cream de Cacao 1 Liter Bottles			Arrow Cream de Cacao 1 Liter Bottles	Add Barcode to Existing Item	
Cancel Batch Items	🖞 Filter a 🗐	+ Done	Cancel Batch Items	s (أ) Filter (۲)	+ Done



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K Barkeep	Items			🗸 Barkeep		Iten	IS		
۹			Carried	C		Item	Details		
Alphabetical		By Category		*Name	Stoli Gala Appl	e	Supplier	Supplier	EDIT
Absolut 1 Liter Bottles				*Category	Category	e	Serving Size		It Serving Size
Absolut				, *Size		750	Serving Units	ml	oz count
750 ml Bottles				*Units	ml liter	oz gal count	Serving Price		\$0.00
Absolut Citron Vodka 1 Liter Bottles				/ *Container	Bottle	EDIT	Empty Wt		15.50 oz
Absolut Grapefruit				Case Count		12	Full Wt		35.80 oz
1 Liter Bottles				Price		\$18.04	Item Code		83664871285
Absolut Mandarin Vodka 1 Liter Bottles				4			Inactive?		
Absolut Pear Vodka 1 Liter Bottles	New Item Found Stoli Gala Apple has been			,	arcodes	83664871285 Add New Barco		Single Ite	m
Absolut Vanilla Vodka 1 Liter Bottles	automatically added to your items	list							0
Amaretto Di Gaetano 1 Liter Bottles	ок 🗿			Cancel 1 Liter Bottles	الل ب	Co	ру	90	Save
Amstel Light 12 oz Bottles				Amstel Light 12 oz Bottles					
Anchor Steam Beer 12 oz Bottles				Anchor Steam 12 oz Bottles	n Beer				
Anchor Steam Singles 22 O 22 oz Bottles	z Bottle			Anchor Steam 22 oz Bottles		Dz Bottle			
Angostura 1919 750 ml Bottles				Angostura 19 750 ml Bottle					
Angry Orchard Crisp Apple 12 oz Bottles				Angry Orchard 12 oz Bottles	d Crisp Apple	1			
Arrow Cream de Cacao 1 Liter Bottles				Arrow Cream 1 Liter Bottles					
Cancel Batch Items	🗂 Filter	(iii) -	+ Done	Cancel	Batch Items	₾	Filter	(m)	+ Done

- 4. If the Item's barcode is in the Barkeep Database, an alert will indicate it has been added to your Items List.
- 5. You can now add additional information to your Item, for example a Category, Supplier, etc. 🤒
- 6. When you are finished, press Save on the bottom toolbar. 🚺

Why are there some Items in the Barkeep Database without UPC Barcodes?

The product information in the Barkeep Database is supplied to us by manufacturers and distributors. The current database has over 75,000 Items that include different products, bottle sizes and varieties. We continually are updating and expanding the database when we receive additional information and new products. Some Items even have more than one barcode, and this can be determined by region or country. There can also be separate barcodes for specific varieties, limited editions and different vintages of wine.

If there is more than one barcode, which one should I use?

If you are going to scan barcodes to add Items to Barkeep inventories, be sure to add the barcode to the Item Details that appears on the bottles you receive from your Supplier.

Adding New Items by Scanning (cont.)

What happens if you scan a barcode that is not in the Barkeep Database?

- I. Not every barcode you scan will be found in the Barkeep Database.
- 2. When a scanned barcode is not found you will see an Item Not Found pop-up alert.

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Barkeep	Items			Karkeep		Iten	ns		
٩			(Canical)	C		Item	Details		
Alphabetical		By Category		*Name	Name		Supplier		EDIT
Absolut 1 Liter Bottles				*Category	Category	EDIT	Serving Size	-	erving Size
Absolut				'Size		1			count
750 ml Bottles				*Units	ml liter	oz gal count	Serving Price		\$0.00
Absolut Citron Vodka 1 Liter Bottles				/ *Container		EDIT	Empty Wt		0.00 oz
Absolut Grapefruit 1 Liter Bottles				Case Count		12 \$0.00	Full Wt Item Code		0.00 oz 2297406
Absolut Mandarin Vodka 1 Liter Bottles				1			Inactive?		0
Absolut Pear Vodka 1 Liter Bottles	Item Not Found Create new item?			,	Barcodes	2297406 Add New Barco	ode	Single Item	
Absolut Vanilla Vodka 1 Liter Bottles	No res			1	100				
Amaretto Di Gaetano 1 Liter Bottles	U			Cancel 1 Liter Bottle	in s	Co	ру	8	Save
Amstel Light 12 oz Bottles				Amstel Light 12 oz Bottles					
Anchor Steam Beer 12 oz Bottles				Anchor Stear 12 oz Bottles					
Anchor Steam Singles 22 Oz I 22 oz Bottles	Bottle			Anchor Stea 22 oz Bottles		Oz Bottle			
Angostura 1919 750 ml Bottles				Angostura 19 750 ml Bottl					
Angry Orchard Crisp Apple 12 oz Bottles				Angry Orcha 12 oz Bottles		le			
Arrow Cream de Cacao 1 Liter Bottles				Arrow Cream 1 Liter Bottle					
Cancel Batch Items	🗂 Filter) (ii) +	Done	Cancel	Batch Items	Û	Filter	(m) +	Done

- 3. If you select No, 😢 and do not have Barkeep create a new Item, you will return to the scanning.
- **4.** If you do want to create a new Item and select Yes, **1** you will see a new Item Details screen.
- 5. In the Item Details screen 🕕 you will see that the <u>only</u> detail for the new Item will be the barcode.
- 6. You will need to add an Item Name, Category, etc. to your Item Details before pressing Save.

Note: Not every Item in the Barkeep Database has a barcode. You may also choose to select No, **(2)** and then search the Barkeep Database before entering all the Item Details. <u>See next page</u> for instructions.

What happens when you scan a barcode for an Item already in your Items List?

When you scan a barcode and the Item is already in your Items List, you will automatically see the Item Details screen. You can review and make changes as needed, or simply press **Cancel** on the bottom toolbar. If the barcode is in your Items List, Barkeep will not allow you to scan an existing Item and inadvertently add a duplicate Item.

Adding New Items by Searching

If you prefer not to scan barcodes, or if a scanned barcode is not in the Barkeep Database, you can add Items by searching the database. We recommend searching the Barkeep Database before entering a new Item manually.

To begin searching, select "Items" to go to the Items screen:

- I. Press the search bar a at the top of the screen to activate the keyboard.
- 2. Begin typing the name 🕒 of the Item you are searching for and press the "Search" button.
- **3.** If the Item is not already in your Items List, you will be given a choice to Search Barkeep's Online Database or Add New Item (manually).
- 4. Select Search Barkeep's Online Database.

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Absolut 1 Liter Bottles		۲	Search Barkeep's Onlin Create a new item by s		
Absolut 750 ml Bottles			Add New Item Manually create a new	item	
Absolut Citron Vodka 1 Liter Bottles					
Absolut Grapefruit 1 Liter Bottles		۲			
Absolut Mandarin Vodka 1 Liter Bottles		۲			
Absolut Pear Vodka 1 Liter Bottles					
Absolut Vanilla Vodka 1 Liter Bottles		۲			
Amaretto Di Gaetano 1 Liter Bottles		۲			
Amstel Light 12 oz Bottles		(3)			
Anchor Steam Beer		~			
500			5 C I		
1 2 3 4 5 Q W E R 1	6 7 8 9 Y U I O I		1 2 3 4 q w e r		o p 🛛
A S D F	g н ј к 🕒	Search	a s d	f g h j	k i G Search
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Adding New Items by Searching (cont.)

- 5. Select the Item(s) O you wish to add to your Items List (e.g., Pernod).
- 6. The final step is to press Save on the bottom toolbar 🚺 or select Cancel to discard your changes.

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Q. Pernod				Iten	ns						
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Reminder: The Search Barkeep feature with an **iPad** requires an Internet connection using Wi-Fi.

Adding New Items by Searching (cont.) Searching for a more specific Item

Some brands have a large family of products, **Skyy Vodka** is a good example – remember that you will need a separate Item for each individual product, for example, **Skyy Vodka**, **Skyy Cherry**, etc.

Below is an example of what might happen if you search "**Skyy**" in Barkeep to add a specific Item to your Items List. For example, you want to add **Skyy Infusion Ginger**. When you search you would find Skyy but would have to Search Barkeep's Online Database to find and add **Skyy Infusion Ginger** to your Items List.

You use the same steps shown on the previous pages.

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Keep Items		< Barkeep Iter	ns
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Skyy Cherry 1 Liter Bottles	۲	S' C' Select Iter	ns to Add
Skyy Vodka 1 Liter Bottles	a	SKYY 1140 ml SKYY	
Search Barkeep's Online Database Create a new item by searching Barkeep		40 oz SKYY - GINGER 750 mi	
Add New Item Manually create a new item	6	SKYY - INFUSION GINGER	
		SKYY - INFUSION PASSION FRUIT	
		1000 ml Skyy 80 Vodka 375 ml	
		Skyy 80 Vodka 1 liter	
		Skyy 80 Vodka	
		Skyy 90 Vodka Z50 ml	C Save
Cancel Batch Items 🗂 Filter	🗐 🕂 Done	Cancel Batch Items	Filter (III) + Done
		Number of the second seco	

- I. When using Search Barkeep to add new Items, <a>2 you will be shown a pop-up list of the first 50 products, sorted alphabetically, that contain your search words. Scroll down to see additional Items.
- The Items that you've selected to add have a check mark on the right hand side of the row to show that they will be added.

Note: that you can add several Items at once by selecting multiple Items.

- **3.** You can deselect an Item by pressing it a second time to uncheck it. Only checked Items will be added to your Items list.
- 4. Press Save C to add the checked Items to your Items list.
- 5. If you decide not to add any selected Items, press Cancel.

Reminder: The Search Barkeep feature with an iPad requires an Internet connection using Wi-Fi. $\widehat{\uparrow}$

Adding New Items by Searching (cont.)

Search Tips

Remember that there are over 75,000 products in our system. So, there will likely be multiple matches for the word(s) you search on. Below are a few search tips:

- **Be as specific as possible.** Typing the entire word will help eliminate unwanted matches. For example, if you are searching for a new flavor of **Hangar One Vodka** it is better to search for "Hangar" or "Hangar One" than "Han."
- **Search for unique words.** For example, if you are searching for the new **Absolut Acai Vodka** it may be better to search for "Acai" than "Absolut."
- **Enter at least three characters.** BarkeepApp will not perform a search with less than three characters.
- Lower or upper case doesn't matter. BarkeepApp will search for any products that contain the word that you've entered anywhere in the product name, regardless of capitalization.
- <u>Check the size!</u> Many searches will come back with the same Item in different sized bottles. Be sure to choose the product with the correct size.
 For example, you do not want to choose Absolut 750ml if you carry the standard Absolut 11 bottles.
 Make sure to double-check this when you add the Items to your Inventory, or your Usage Reports will be inaccurate.
- **Beware of punctuation differences.** For example, a product may be listed as either Hangar One or Hangar-One depending on the manufacturer-released data. So, if you are searching for a product and including punctuation like spaces or dashes, you may have to try more than one time before finding the product you want. It will probably be quicker not to use punctuation when searching for an Item.

Don't forget to review new Items after your Inventory!

When you add Items to an Inventory by Searching the Barkeep Database, we recommend reviewing the new Item(s) in your Items list after you have completed the Inventory. You will need to add a Category as well as other details to generate accurate Reports.

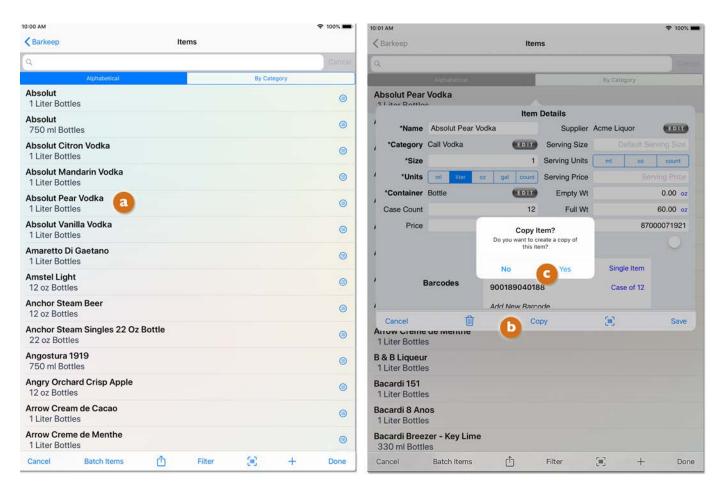
Adding New Items by Copying an Existing Item

Barkeep has a feature where you can copy an existing Item and then modify the copy to create a new Item. This feature is especially useful if you need to add a new Item that is very similar to an existing Item, for example, the same Item but in a different size or a new flavor/variety of a popular Item.

The instructions below show an example where you create a new Item for Absolut Grapefruit.

To create a new Item by copying and by copying an existing Item:

- I. We recommend you search the Barkeep Database first to be sure the Item does not already exist.
- 2. Next, you begin by finding the Item you wish to copy. Select the Item (2) from the Items List.
- 3. This will take you to the Item Details pop-up screen.
- 4. Press to Copy to create the new Item.
- 5. An action menu will ask you to confirm you want to copy the Item. Select Yes. C



Adding New Items by Copying (cont.)

6. You will notice all the details are the same for the copied Item, dexcept the name now has a number 1 at the end.

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вагкеер		iten	15			Keep				_	Iter	ns						
2					(Dance)	٩												(Can)
	Annabetica)			By Category	(Alphabetical							By Cat	egory		
Absolut Pear						Absolut P												
		Item	Details			-				_	Item	Det	ails					
*Name	Absolut Pear Vodk	a1 🔫	Supplier		EDIT	′ *Na	me	Absolut Grap	efruit	e	0		Supp	lier S			1	EDIT
*Category	Call Vodka	EDIT	Serving Size		ult Serving Size	, *Categ	ory	Call Vodka			EDIT	Se	erving S	ize		Defaul	t Servin	ig Size
*Size		1	Serving Units	mt	oz count	*5	Size				1	Se	rving Ur	nits	ml	0	z	count
*Units	ml liter oz	gal count	Serving Price		Serving Price	′ •u	nits	ml liter	oz	gal	count	Se	rving Pr	ice				g Price
*Container	Bottle	EDIT	Empty Wt		0.00 oz	*Contai	iner	Bottle		(EDIT	1	Empty	Wt			c	0.00 oz
Case Count		12	Full Wt		60.00 oz	Case Co	ount				12		Full	Wt			60	0.00 <mark>oz</mark>
Price		\$25.40	Item Code		Item Code	, Р	rice				\$25.40		Item Co	de				n Gode
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1 Liter Bottle	S						*			-	12				T		?	
acardi Bree 330 ml Bottl	zer - Key Lime es						z	x c		V	b		n	m			•	
				30	141	.?123 6		Ŷ								.?12	2	Ŵ

- 7. Now make the necessary changes to your new Item.
- 8. Modify the name of the copied Item. 🕒 In this example it's changed to Absolut Grapefruit.
- 9. You can make other changes to the new Item's details, e.g., price, Category, size, etc.
- **10.** Also, if a barcode already exists, remove the old barcode associated with the Item you copied from and add a new, correct one.
- II. Once you have finished entering details for your new, copied Item, you can save your changes by pressing Save on the bottom toolbar for select Cancel to discard them.

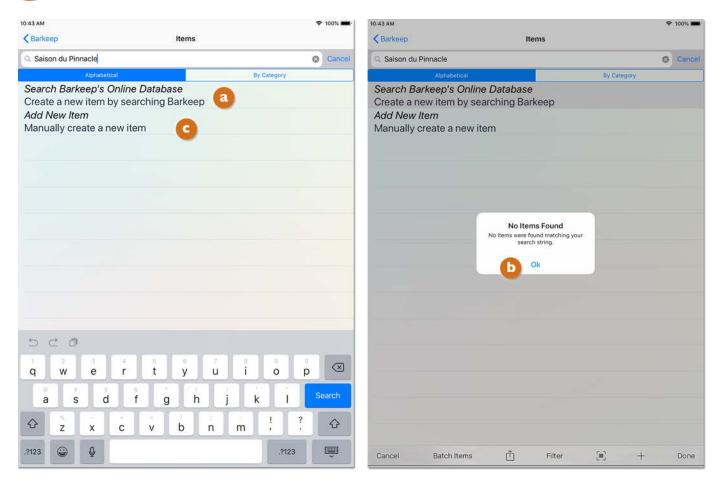
Note: See the <u>Support Section</u> at <u>barkeepapp.com</u> for a guide with tips for managing <u>Products with Different Sizes and Varieties</u>.

Adding New Items Manually

Search First

Before you choose to add an Item manually, we recommend you search 🔕 the Barkeep Database first.

In the example below, you are searching on "Saison du Pinnacle" to add the Canadian craft beer. Because the Item is not yet in Barkeep's Online Database, select "Ok" b and now choose to Add New Item manually. C You will be taken to a blank, new Item Details screen.



Adding New Items Manually (cont.)

To add an Item manually:

- I. Select "Items" on the Main Screen.
- 2. On the Items screen, select the \pm icon $\boxed{2}$ in the bottom toolbar.
- 3. You will see a blank, new Item Details pop-up screen. 🕒
- 4. If you have searched first (see previous page) C and then chosen to manually Add New Item, you will be taken directly to a blank, new Item Details pop-up screen.
- 5. Press the name field 🧿 to activate the keyboard and begin entering details.

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ç n	·····		Details			C D	11- 0-	Item	Details			
*Name	b		Supplier	Supplier	EDIT	*Name	Name	d	Supplier	Supplier.		
Category	Category	EDIT	Serving Size		fault Serving Size	/ *Category	Category	EDIT	Serving Size	De	afault Servi	ing Size
*Size		1	Serving Units	ml	oz count	*Size		1	Serving Units	ml	OZ	count
*Units	ml liter o	z gal count	Serving Price		\$0.00	*Units	ml: liter	oz gal count	Serving Price	-		\$0.00
*Container	Bottle	EDIT	Empty Wt		0.00 oz	*Container	Bottle	EDIT	Empty Wt			0.00 oz
Case Count		12	Full Wt		0.00 oz	Case Count		12	Full Wt			0.00 oz
Price		\$0.00	Item Code		Item Code	Price		\$0.00	Item Code		Ite	m Code
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Cancel	Batch Items	Ċ	Filter	a	+ Done	.?123	Ŷ				.?123	Ű

Barkeep Tip: Try adding a test Item manually.

Give the Item a name like **ABC Test** and add a Category and all the other information, etc. Just be sure, to delete the test Item after you have finished.

Adding New Items Manually (cont.)

6. The Item Details pop-up screen allows you to enter the details ⁽²⁾ for a new Item that you create manually or modify the details of an existing Item.

Note: Item Details where the field name has an * asterisk are required.

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*Name	е	Saison d	u Pinna	cle			Suppl	ier Su						*Name	Saison	du Pinna	cle			Supp	olier		Ŕ.		EDIT
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*Size	е				24.5	5 Se	rving Ur	iits 🗧	ml	oz	cou	int		*Size				24.5	Se	rving U	nits	mi	oz		count
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*Containe	er E	Bottle	1		EDIT		Empty	Wt			0.00) oz	*Co	ntainer	Bottle			EDIT)	Empty	Wt			0	0.00 oz
Case Coun	nt	C	-	-	24	1	Full	Wt			0.00) oz	Cas	e Count				24		Full	Wt			0	0.00 oz
Price	е	-		>> \$	3.45 😋		Item Co	de				ode		Price				\$3.45		Item C	ode				Code
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Select a Catego	ory
Beer 😗	
Beer (non-alcoholic)	
Bottle Beer	
Cider	
Bottled Cider	
Draft Cider	
Domestic Bottled Beer	
Domestic Draft Beer	
Imported Bottled Beer	
Cancel	(h) Save

- Selecting a Category for your new Item is an important detail you need to add.
 See the previous <u>Categories</u> section for more information.
- 8. Press the 💷 button next to the Category field. 🚺
- 9. A pop-up menu will appear. 🙆
- 10. Select a Category ad press to Save your selection.
- II. Once you have finished entering details for a new Item, or modified an existing Item, you can save your changes by pressing Save on the bottom of the Item Details popup screen i or select Cancel to discard them.

Note: You can return to any Item later to make changes or add more details.

Adding Barcodes to Items

To scan and add a barcode to an existing Item:

- I. Select the Item from your Items List.
- 2. After selecting the Item, you will see the pop-up Item Details screen.
- 3. On the bottom toolbar <a>2 of the Item Details screen the scan icon to:
 - a. Activate your iPad's camera
 - b. Activate the Infinea Tab scanner
- **4.** After scanning the barcode, camera users should press **Done b** to continue.
- 5. The Infinea Tab scanner will beep to indicate the barcode has been successfully scanned and added to the Item Details.
- 6. Barkeep will take you back to the Barcode Details screen.

10:06 AM					100%	12:22 PM					🕈 89% 🔳
🗸 Barkeep		Iten	ns			Barkeep		Items			
c		Item	Details			Q					Cancel
*Name	Stoli Gala Apple	e	Supplier		EDIT	Alphabetical			By Cate	egory	
*Category	Category	EDIT	Serving Size	Defau	It Serving Size	Stoli Gala Apple 750 ml Bottles	The second second second second				
*Size		750	Serving Units	mi	oz count	Stoli Pomegranite	States in the state of the state				
*Units	ml liter o	oz gal count	Serving Price		\$0.00	1 Liter Bottles	And A COLOR OF A	N SERVICE AND A			
/ *Container	Bottle	EDIT	Empty Wt		15.50 oz	Stoli Razberi	MALANPLE FLAVOR	0			
Case Count		12	Full Wt		35.80 oz	Stoli Vanil	AAPSIAN AODICA				
Price		\$18.04	Item Code		Item Code	1 Liter Bottles			16 🕑		
,	0		Inactive?		0	Tanqueray Gin 1 Liter Bottles			Done		
· .	Barcodes	Add New Barco	ode		_	Test Weigh 0 ml Bottles					
						Tia Maria 1 Liter Bottles					
Cancel 1 Liter Bottle	s	Co	ру	8 0	Save	Tin Roof Merlot 750 ml Bottles					
Amstel Light 12 oz Bottles						Tuaca 1 Liter Bottles					
Anchor Stear 12 oz Bottles	Contraction of the second					Tullamore Dew 1 Liter Bottles					
Anchor Stear 22 oz Bottles	m Singles 22 C s	z Bottle				Well Vodka 1 Liter Bottles					
Angostura 19 750 ml Bottl						White Zinfandel - Sutter 750 ml Bottles	Home				
Angry Orcha 12 oz Bottles	rd Crisp Apple					WHITE ZINFANDEL - WO 750 ml Bottles	DODBRIDGE				
Arrow Cream 1 Liter Bottle						Widmeyer Hefeweissen 15.5 Gallon Kegs	Keg				
Cancel	Batch Items	Û	Filter	(m) ·	+ Done	Cancel Batch Item	s Ô	Filter	90	+	Done

Note: You can also select Add New Barcode **G** in the Item Details screen and add the barcode manually.

Adding Barcodes to Items (cont.)

7. On the Barcode Details screen, press to Save d the barcode or select Cancel to discard the changes.

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Karkeep	Iten	ns		✓ Barkeep	Iten	ns		
م			Candal	c	Item	Details		
Alphabeti	cal	By Categor	y.	*Name Stoli Gala App	le	Supplier		EDIT
Stoli Gala Apple				*Category Category	EDIT	Serving Size	Default Ser	ving Size
				*Size	750	Serving Units	ml oz	count
		e Details		*Units milliter	oz gal count	Serving Price		\$0.00
	Item Stoli Gala Ap	ople (EDIT)		/ *Container Bottle	EDIF	Empty Wt		15.50 oz
	Barcode 8366487128	85		Case Count	12	Full Wt		35.80 oz
	Type Single Item	Case		Price	\$18.04	Item Code	8366	64871285
	туре		1	1		Inactive?		0
c	Case Cnt	12			8366487128	-	Single Item	
				Barcodes	Add New Barc		C	Save
				Amstel Light				
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1 Liter Bottles				Anchor Steam Beer 12 oz Bottles				
Well Vodka 1 Liter Bottles				Anchor Steam Singles 22 22 oz Bottles	Oz Bottle			
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WHITE ZINFANDEL - V 750 ml Bottles	WOODBRIDGE			Angry Orchard Crisp Appl 12 oz Bottles	e			
Widmeyer Hefeweisse 15.5 Gallon Kegs	en Keg			Arrow Cream de Cacao 1 Liter Bottles				
	ems (Ť)	Filter 🗐	+ Done	Cancel Batch Items	ſŤ	Filter)ii) +	

Multiple Barcodes

What if I need to add more than one UPC barcode to an Item?

You may assign different barcodes for the same Item. For example, many manufacturers have a barcode for a single bottle as well as different barcodes for a case of 6 bottles and 12 bottles, etc. See the **Receiving Inventories** section for specific instructions.

What if I add the same UPC barcode to a different Item?

For example, when you are adding a barcode and accidentally scan the wrong bottle. Barkeep will <u>not</u> recognize your mistake. If that barcode is already in your data, every time you scan it, by default Barkeep only recognizes the first Item you assigned to the barcode.

Note: When you add a new Item by copying an existing Item, it is important to add the barcode for the new Item.

Note: See **<u>Scanning Tips</u>** and instructions for scanning Items to add to an Inventory.

Adding/Modifying an Item's Category

Once you've searched Barkeep's database and added a new Item, you will need to go in and modify the Item Details to set the Category. This is also required if you have added an Item manually and not yet added a Category. Because you can customize the Categories that are defined in Barkeep, we do not attempt to set a default Category for Items that you added by Searching Barkeep. By default, these Items will show up with a Category of "None."

To an add or modify a Category for an Item:

1. Select the Item from your Items List and press (EDDD) on the Items Detail screen. (2)



- 2. Select a Category **b** and press to Save your selection.
- 3. You can make additional changes to the Item Details. Once you have finished modifying details for the Item, you can save your changes by pressing Save on the bottom toolbar d or select Cancel to discard them.

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Barkeep		Iten	ns			Keep			Item	S				
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Angry Orchar		•				Angry Orchard	Crisp Apple							
		Item	Details				t a Categ	ory						
*Name	Angry Orchard	Crisp Apple	Supplier	ABC Beers	EDIT	(Beer								
*Category	Category	a	Serving Size	1	1.00	' Beer (non-a	lcoholic)							
*Size		12	Serving Units	m	oz count	Cider								
*Units	ml liter	oz gal count	Serving Price		\$8.00	Bottled Cir							-	
*Container	Bottle	EDIT	Empty Wt		0.00 oz								b) '
Case Count		24	Full Wt		0.00 oz	Draft Cide								
Price		\$1.00	Item Code			Domestic Bo	ottled Beer							
			Inactive?		0	Domestic Dr	aft Beer							
		Add New Barc	ode			Imported Bo	ttled Beer							
B	Barcodes					Premium Do	mestic Beer	ł						
						Craft Beer								
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Reminder: BarkeepApp is automatically installed with a set of standard Items that are commonly used in most bars - like Absolut Vodka and Budweiser Beer. We start out by keeping the number that is installed on your **iOS** Device as small as possible. The pre-installed Items are assigned Categories but you may change the Category for any Item.

Adding/Modifying the Container Type

Once you've added a new Item, you may modify the Item Details to set the Container Type. By default, new Items added from the Barkeep Server will have the correct Container Type (e.g., Bottles, Kegs, etc.). If you manually create a new Item without searching the Barkeep Server, it will have the default Container Type "Bottle." You can change the Container Type if needed.

Note: You may have many products with identical brand names, (e.g., **Wyder's Pear Cider**) but you <u>must</u> have separate Items in Barkeep such as **Wyder's Pear Cider** (12 oz. bottles) and **Wyder's Draft Pear Cider** (15.5 gallon kegs).

To add or modify a Container Type for an Item:

- I. Select the Item from your Items List.
- 2. Press 💷 on the Items Detail screen. 🔕
- 3. Select a Container Type. In this example replace the default Bottle with Keg. 🕩
- 4. Press to Save your selection.
- 5. You can make additional changes to the Item Details. Once you have finished modifying details for the Item, you can save your changes by pressing Save on the bottom toolbar ¹ or select Cancel to discard them.

0:11 AM					≎ 100% 🔳	10:11 AM								중 100% ■
ζ Barkeep		Iten	ns			Karkeep			Items					
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	Alphabetical			By Category			Alphabe	tical			E	y Category		
Nyder's Draf						Wyder's D			100					
		Item	Details			с.		Choose	a Con	tainer	Туре			
*Name	Wyder's Draft Pe	ear Cider	Supplier	ABC Beers	EDIT									
*Category	Draft Cider	EDIT	Serving Size		16.00									
*Size		15.5	Serving Units	ml	oz count									
*Units	ml liter or	gal count	Serving Price		\$9.00			ficitite						
*Container	Bottle	a	Empty Wt		0 oz			Can	-					
Case Count		0	Full Wt		0 oz			Keg 🕒						
Price		\$95.00	Item Code		Item Code			Each						
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Item Properties

Barkeep defines an Item as any product that you carry in inventory – like **Absolut 1I**, **Bud Light**, **Stella 15.5** gallon kegs, etc. The Item's entry contains general information about the product shown on the Item Details screen.

	🔇 Barkeep	Iten	ıs			
ľ	۹				Carica	
Ì	Alphabetic	al		By Category		1
	Absolut					
	750 ml Rottloc	Item	Details			
	*Name Absolut		Supplier	Acme Liquor	EDIT	١.
	*Category Call Vodka	EDIT	Serving Size		2.00	
	*Size	750	Serving Units	ml oz	count	
	' *Units mi lite	r oz gal count	Serving Price		\$6.00	
	*Container Bottle	EDIT	Empty Wt		25.50 oz	
	Case Count	12	Full Wt		36.20 oz	
	Price	\$18.00	Item Code	870	00069929	
			Inactive?		0	Ŀ
	•					
		97815965259	79	Single Item		
	' Barcodes	Add New Barco	ode			
	1	谕 c o		6.2		
	Cancel Ancnor steam singles	-	ру		Save	
	22 oz Bottles					
	Angostura 1919 750 ml Bottles					
	Angry Orchard Crisp A 12 oz Bottles	pple				
	Arrow Cream de Cacao 1 Liter Bottles)				
	Arrow Creme de Menth 1 Liter Bottles	ne				
	Cancel Batch Iten	ns (أ)	Filter	(m) +	Done	

In the Item Details Screen, the Item Properties, or details, with an asterisk * are required and crucial for you to use Barkeep effectively.

Each Item needs a:

- ✓ Name
- ✓ Category
- ✓ Size
- ✓ Units of Measure
- ✓ Container Type

The other Item Properties are optional but will be needed depending on which Barkeep features you plan to take advantage of. For example, if you plan to weigh partial bottles you will need a Full and Empty Bottle Weight, but you would only need that for the Items you plan to weigh. If you plan to scan barcodes, you will have to make a barcode is assigned to the Item.

The Price is not required, but we highly recommend you include the Price you pay your Supplier for the Item. This will allow you to cross-reference your Receiving Inventories with Supplier Invoices and will also result in more useful Reports.

Note: The more optional information you add to your Items will result in more effective and detailed Reports in BarkeepApp and BarkeepOnline.

Property	Description
Name	The name of the Item. This should be descriptive enough to differentiate between different products. For example, Kendall Jackson Vintner's Reserve Chardonnay instead of Kendall Jackson Chardonnay .
Category	Categories are used to group Items for Usage Reports, Variance Reports and Pour Cost analysis. It is important that you align your Categories with the way that you capture Sales Data to make effective Pour Cost analysis possible.
Size and Units	The size and units of measure for the bottle or other container type. For example, 750ml, 12 oz, 1.5 gallons, etc.
Container	Choose the container type for the Item. Containers can be one of Bottles, Cans, Kegs, Each. Boxes, Bags in Box or Cartons.
Supplier	Any supplier, vendor or company that provides you with Items (the products you carry in Inventory).
Price	The price that you normally pay for the product. On occasion you may pay a different price for a specific Item. You can make that price change on your Receiving Inventory.
Serving Price	You can set an optional default Serving Price and Serving Size for any Item. When you set a Serving Price and Size for your Items this information can be included in Usage Reports and, for BarkeepOnline users, Pour Cost Reports.
Case Count	The quantity of Items per case (e.g., 12, 24, etc.). If you want to count an Item by the case, an Item must have a Case Count.
Full Wt	The weight of a FULL bottle/can/keg, in ounces. This is important if you want to use Weight to measure partial bottles, kegs or other container types. BarkeepApp uses the difference between the full bottle weight and empty bottle weight to calculate exactly how much liquor (by volume) is in a partial bottle when you enter partial bottle quantities by weight. The combination of Full Bottle Weight and Partial Bottle Weight allows BarkeepApp to be highly accurate in calculating partial bottles or other container types. Note: You should enter the weight of a partial bottle including the pour spout if you plan to weigh partial bottles with a pour spout.
Empty Wt	The weight of an EMPTY bottle/can/keg, in ounces. This is important if you want to use Weight to measure partial bottles or other containers. BarkeepApp uses the difference between the full bottle weight and empty bottle weight to calculate exactly how much liquor (by volume) is in a partial bottle when you enter partial bottle quantities by weight. The combination of Full Bottle Weight and Partial Bottle Weight allows BarkeepApp to be highly accurate in calculating partial bottles.
Serving Size	See Serving Price (above)
Serving Units	The units you measure you use to serve the Item (e.g., oz., ml, count/each). The unit of measure does not have to match the bottle, for example a 750ml bottle can have a Serving Size of 2 oz. – the Serving Units would be ounces.
Item Code	A number or other identifier used by your Supplier to identify products when placing orders. It may be the same as the UPC barcode, or it may be a different identifier determined by your Supplier.
Barcode	The UPC barcode number(s) for the product. You may assign different barcodes for the same Item. For example, many manufacturers have a barcode for a single bottle as well as different barcodes for a case of 6 bottles and 12 bottles, etc.

Serving Prices and Serving Sizes

Barkeep allows you to set a default Serving Size and Serving Price for every Item. When you set a Serving Size for your Items, Barkeep will show:

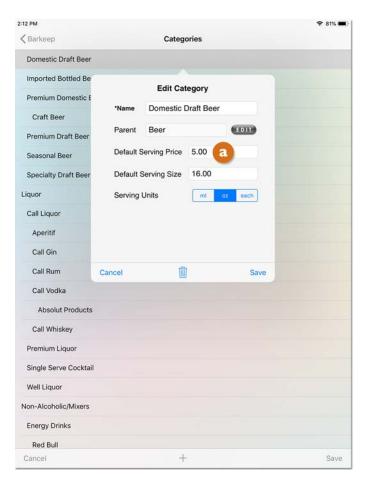
- How many Servings were consumed in both Usage, Variance and Pour Cost Reports².
- The Retail Value of the liquor consumed in both your Usage and Pour Cost Reports.

This is a great way to get a sense for how much Sales you should have gotten based on the quantity of liquor used. By comparing this to your actual Sales, you can quickly determine whether your Sales figures are consistent with how much liquor has been used.

Note: Serving Sizes and Serving Prices work with Items that you always serve in the <u>same</u> quantity and sell for the <u>same</u> price. They will not give you useful results for Items that you sell in different serving sizes and at different prices.

Can a Category have a Serving Size and Price?

Yes. 2 When you set a Serving Price and Size at the Category level it will apply to all Items in that Category. For example, with the category **Domestic Draft Beer** if you set your Serving Size to 16 oz. and your Price to \$5.00 every Item in the Category (i.e., **Budweiser Draft, Miller Draft**, etc.) will show the same Serving Size and Price.



² Variance Reports and Pour Cost Reports are a feature available only to BarkeepOnline subscribers

Serving Prices and Serving Sizes (cont.).

What if an Item's Serving Price is different from the other Items in the Category? Setting a different Serving Size and Serving Price for an Item will override the values set for that Item's Category. For example, if the price for **Michelob Draft** was \$6.00 **D** instead of the Category price of \$5.00.

Barkeep		Item	127								
2			15			Karkeep		Iten	ns		
					Cancel	٩					Cam
	Alphabetical			By Category			Alphabetical			By Category	
Aichelob Golde	en Draft 1/2 Barr					Sierra Nevad					
		Item	Details			1			Details		
*Name M	lichelob Golden Draft	1/2 Barrel	Supplier /	ABC Beers	EDIT	*Name	Sierra Nevada Ke	eg	Supplier /	ABC Beers	EDIT
*Category Do	omestic Draft Beer	EDIT	Serving Size		16.00	1 *Category	Specialty Draft Be	er EDIT	Serving Size		G 16.00
*Size		15.5	Serving Units	ml oz	count	*Size		15.5	Serving Units	mi	oz count
*Units	ml liter oz	gai count	Serving Price	b	\$6.00	L *Units	ml liter oz	gal count	Serving Price	d	Serving Price
*Container Ke	eg	EDIT	Empty Wt	33 lb	0.00 oz	/ *Container	Keg	EDIT	Empty Wt	32 lb	0.00 oz
Case Count		1	Full Wt	160 lb	0.00 oz	Case Count		1	Full Wt	166 lb	2.00 oz
Price		\$94.00	Item Code	18	3200029400	l Price		\$185.00	Item Code		
			Inactive?		0	4			Inactive?		0
	18	3200029400)	Single Item		1		Add New Barc	ode		
Bar	rcodes Ac	dd New Barco	ode			1	Barcodes				
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375 ml Bottles						750 ml Bottle	es				
himay Ale Blue 11.2 oz Bottles	e Label					Bushmill's 1 Liter Bottle	s				
Corona Extra 12 oz Bottles						Christian Bro 1 Liter Bottle					
uinness Draug 11.2 oz Bottles	ght Singles 11.2	0 Oz Bottle				Cuervo Gold 1 Liter Bottle	s				
leineken 12 oz Bottles						Cuervo Silver 1 Liter Bottle					
		(Ť)		(ii) +		•·· • ·	Batch Items	ŕ	Filter	(m)	+ Do

Can you set a Serving Size without a Price?

Yes. C You do not need to add a Serving Price. C You would be able to review your Servings in Usage, Variance and Pour Cost Reports for accuracy. However, without a Serving Price, your Reports would not show Retail Value.

Serving Prices and Serving Sizes (cont.).

Examples

Below are some examples of Items you might assign a Serving Price and Size to:

		Item	Details		
*Name	Rolling Rock		Supplier	ABC Beers	EDIT
*Category	Domestic Bottled Beer	EDIT	Serving Size	e (e)	1.00
*Size		12	Serving Units	ml oz	count
*Units	ml liter oz	gal count	Serving Price		\$7.00
*Container	Bottle	EDIT	Empty Wt		0.00 0
Case Count		24	Full Wt		0.00 0
Price		\$0.75	Item Code		Item Code
			Inactive?		0
		143934806	3	Single Item	
1	Barcodes Add	d New Barco	ode		
Cancel	Ŵ	Co	ру	8	Sav
		Item	Details		
*Name	Merlot - Sutter Home	(Supplier	Smith & Jones	EDIT
*Category	Red Wine	EDIT	Serving Size	•	6.0
*Size		750	Serving Units	ml oz.	count
*Units	m liter oz	gal count	Serving Price		\$6.0
*Container	Bottle	EDIT	Empty Wt		0.00
Case Count		12	Full Wt		0.00
Price		\$7.99	Item Code	85	20000108
			Inactive?		0
	85	200001088	3	Single Item	
1	Barcodes Ad	d New Barco	ode		
Cancel	Û	Co	ру	œ	Sav
		Item	Details		
*Name	Skyy Vodka		Supplier	Acme Liquor	EDIT
*Category	Call Vodka	EDIT	Serving Size	B	2.00
*Size		1	Serving Units	ml oz	count
*Units	mi liter oz	gal count	Serving Price		\$9.00
*Container	Bottle	EDIT	Empty Wt		20.90
Case Count		12	Full Wt		54.70 0
Price		\$15.67	Item Code		Item Code
			Inactive?		0
		d New Barco	ode		
1	Barcodes				
Cancel	闡	Cor	ov	33	Save

- An Item that you sell by the bottle, for example bottled beer is obviously an Item as you sell an entire unit each time you sell this Item.
 The Serving Size is 1 the Serving Unit is count.
- Draft beer where you consistently serve the same pint size (i.e., 16 oz.).
- Wine by the glass,
 your house wines where you sell glasses often and open multiple bottles during a business day.
- Liquor where you consistently serve the same amount of the Item (2) in each cocktail (e.g., 2 oz.) and always price cocktails the same when they include the Item.

Below are examples where you would <u>not</u> assign a Serving Price and Size:

- ✓ Draft Beer served in multiple sizes.
- Liquor Items that are in used in different amounts in various cocktails that are also priced differently. An example where you could not assign a Serving Size and price might be a variety of **Triple Sec**.
- ✓ Champagne that is used in cocktails, sold by the glass and by the bottle all at different prices.

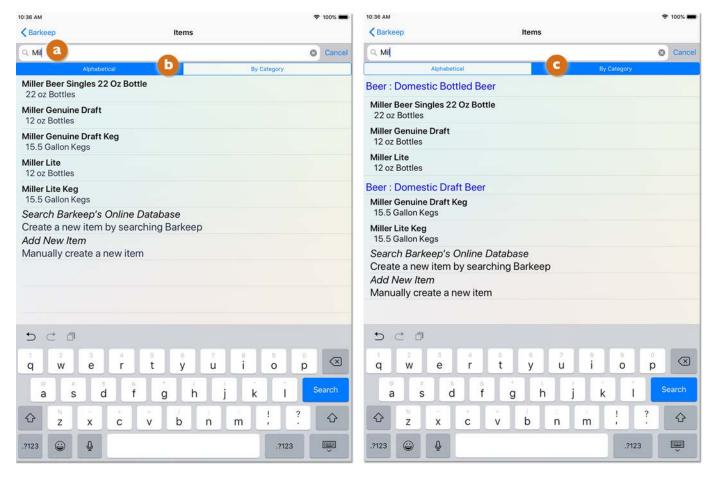
Note: To use this feature effectively, you must assign Serving Price, Size and Unit to an Item. If you were to assign a Price without a Size or vice versa, you would not have meaningful information in your Reports.

Also see the **Usage Report** section for Reports showing Serving Price, Size, etc.

Finding Items

In the Items screen, you can search for Items by typing part of the Item name in the search bar. As you type, the Items List will automatically reduce to show only Items containing the letters typed into the search bar.

You can also view the Items List (b) Alphabetically or C By Category using the sort buttons located directly below the search bar.



Editing Items

To edit an existing Item:

- 1. You begin by finding <a>[a] the Item as shown on the previous pages.
- 2. Press the Item (b) you wish to edit on the Items List.
- 3. This will take you to the Item Details screen where you can change the information for the Item.
- 4. Press to Save the changes or select Cancel to discard them.

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			Detaile
		Name Miller Lite	
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Miller Lite Keg			
Create a new item by searching Add New Item			<u> </u>
Manually create a new item			ode
		Cancel 🗍 Co	py 😥 👩 Save
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Note: See detailed instructions for adding **Full Bottle Weight and Empty Bottle Weight** information.

Items Report

You can generate a report containing your Items list by pressing action (1) icon (2) on the bottom toolbar and then selecting Items Report. (D) BarkeepOnline users can download this report as an Items List.

10:15 AM		중 100% ■
Karkeep	Items	
٩		Cano
Alphabetical	By Category	
Absolut 1 Liter Bottles		
Absolut 750 ml Bottles		
Absolut Citron Vodka 1 Liter Bottles		
Absolut Grapefruit 1 Liter Bottles		
Absolut Mandarin Vodka 1 Liter Bottles		
Absolut Pear Vodka 1 Liter Bottles		
Absolut Vanilla Vodka 1 Liter Bottles		
Amaretto Di Gaetano 1 Liter Bottles		
Amstel Light 12 oz Bottles		
Anchor Steam Beer 12 oz Bottles		
Anchor Steam Singles 22 Oz Bottle 22 oz Bottles		
Angostura 1919 750 ml Bottles		
Angry Orchard Crisp Apple 12 oz Bottles		
Arrow Cream de Cacac Items 1 Liter Bottles	s Report	
Cancel Batch Items	🕒 Filter 🔐 -	+ Done

Deactivating and Deleting Items

Deactivate Items

When you make an Item inactive, the Item remains in your older Inventories. This is a good choice when you do <u>not</u> want to change your older Barkeep data. You can reactivate an Item by simply unchecking the option.

What happens to Inactive Items?

Inactive Items will no longer appear when scrolling through the Items list to add it to an Inventory or when you search for an Item while adding to an Inventory. But, Inactive Items will appear in your regular Items List and will be marked (*inactive*) – as shown below.

What sort of Items would a user want to make inactive? Any Item you no longer carry. Perhaps it is a discontinued product, it might have been a special promotional product or one-time purchase. It could also be a seasonal product that you might make inactive in the fall and reactivate in the spring.

2:31 PM					4	73% 🔳
Barkeep		ltems				
Q Sierr					۵	
	Alphabetical		B	y Category		_
Sierra Nev 12 oz Bott	ada Big Foot Ale	Singles				
Sierra Nev 15.5 Gallo						
Sierra Nev 12 oz Bott	ada Pale Ale Sing	les 12 Oz Bottle				
Sierra Neva 12 oz Bott	ada Summerfest (:les	inactive)				
Sierra Nev 12 oz Bott	ada Wheat Single	es 12 Oz Bottle				
	arkeep's Online	e <i>Database</i> arching Barkeep				
Add New Manually	<i>Item</i> create a new it	em				
		Show Inact	ive Items			
Cancel	Batch Items	رأً) Filte	er 🔅	+		Done

Note: If you press **Filter** at the bottom of the screen, you can select an option to **Show Inactive Items** in your Items List.

continue to next page to deactivate an Item

Deactivating and Deleting Items (cont.)

Making an Item Inactive

To deactivate an Item, begin with the same steps you follow to an edit an Item:

- I. You begin by finding the Item.
- 2. Press the Item 🔕 you wish to deactivate on the Items List.
- 3. This will take you to the Item Details screen 🕒 where you can change the information for the Item.
- **4.** Note the switch with the question: "Inactive?" Switch **(**) to the on position.
- 5. The Item will appear in the Items List as inactive.
- 6. Press to Save the changes or select Cancel to discard them.

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Q Skyy	0	(Cancel	Q Skyy					O Cano
Alphabetica	4	By Category		Alphabetical			By Catego	ay,
Liquor : Call Liquor : C	Call Vodka		Ľ		Item	Details		
Skyy Cherry 1 Liter Bottles				Skyy Cherry Call Vodka		Supplier Serving Size	Supplier	EDIT 2.00
Skyy Vodka 1 Liter Bottles			size		1	han a Sanna	mt	oz count
Search Barkeep's Or Create a new item by			*Units (*Container		oz gal count	Serving Price Empty Wt		\$9.00 20.90 oz
Add New Item Manually create a ne			Case Count		12	Full Wt		54.70 oz
		Price		\$15.98	Item Code Inactive?			
				Add New Barco	ode			
				Barcodes				
			Cancel	Ū	Co	ру	90	d Save
	A	-						
Cancel Batch Item	ns 🗇 Filter	💭 🕂 Done	Cancel	Batch Items	Ċ	Filter	96	+ Do

Note: To reactivate an Item you simply follow the steps shown above but switch to the off position. If you are managing your Items List and scan the barcode of an inactive Item, the Item details screen will appear, and you can switch the Item to active again.

What sort of Items would a user want to delete?

An Item that is in your Items List that you have never included in an Inventories. It might be a default Item that came pre-loaded in BarkeepApp that you do not carry. It also could be an Item that you inadvertently added to your Items List. We recommend making older Items inactive if you have added them to Inventories in the past.

Please read this page before deleting any Items.

Warning: If you choose to delete an Item from your Items List, BarkeepApp will remove the Item and all references to that Item. This means that if you have used the Item in an existing Inventory, the Item will be deleted from that Inventory. So please be careful when deleting an Item to avoid unexpectedly altering an existing Inventory.

To delete an existing Item:

- I. You begin by finding the Item as shown on the previous pages.
- 2. Press the Item you wish to delete on the Items List.
- 3. This will take you to the Item Details screen where you can <a>2 press the <a>1 icon on the bottom toolbar.
- 4. An action menu will ask you to verify that you want to Delete the Item. 🕒
- 5. Or, you can also delete an Item from your Items List by swiping your finger horizontally across the Item on the Items List screen C and then pressing the Delete button. This will immediately delete the Item.

Note: If you have inadvertently deleted an Item you will have to re-add to your Items List (See the <u>Adding New Items</u> section of this User Guide). But remember, if that Item was in existing Inventories, it will not automatically be added back into the Inventories when you re-add the Item.

10:12 AM				হ 100% 🔳	10:12 AM					🗢 100% 🛲
🗸 Barkeep	Iter	ns			< Barkeep		Item	s		
Q				Constant.	Q					Testing .
I LITEI DOTTE	Alphabetical		By Category		I LILEI DOLLE	Alphabetical			By Category	
Absolut Man	darin Vodka				Absolut Man	darin Vodka				
		Details		-		e	Item	Details		
*Name	Absolut Mandarin Vodka	Supplier	Acme Liquor	EDIT	/ *Name	Absolut Manda	irin Vodka	Supplier	Acme Liquor	EDIT
, *Category	Call Vodka	Serving Size		2.00	, *Category	Call Vodka	EDIT	Serving Size		2.00
*Size	1	Serving Units	mi oz	count	*Size		1	Serving Units	mi .	oz count
' *Units	ml liter oz gal count	Serving Price		erving Price	/ *Units	ml liter	oz gal count	Serving Price		Serving Price
*Container	Bottle	Empty Wt		27.10 oz	*Container	Bottle	EDIT	Empty Wt		27.10 oz
Case Count	12	Full Wt		59.50 oz	Case Count					59.50 oz
/ Price	\$24.00	Item Code	87	000071926	/ Price		Delete Deleting an Item n	emoves it from		87000071926
,		Inactive?		0	,		existing Inventories. want to delete			
	Add New Barc	ode		-			Cancel	Delete)	
́ Е	Barcodes				, E	Barcodes				
Cancel	a 🛍 🗠	ру	3	Save	Cancel	1	Co	by	3	Save
Arrow Cream 1 Liter Bottles					Arrow Cream 1 Liter Bottle					
Arrow Creme 1 Liter Bottles					Arrow Creme 1 Liter Bottle					
B & B Liqueur 1 Liter Bottles					B & B Liqueur 1 Liter Bottle					
Bacardi 151 1 Liter Bottles	5				Bacardi 151 1 Liter Bottle	s				
Bacardi 8 An	os				Bacardi 8 An	os				
Cancel	Batch Items	Filter	(ii) +	Done	Cancel	Batch Items	Û	Filter		+ Done

continue to next page

Deleting Items (cont.)

Swiping Option

6. You can also delete an Item from your Items List by swiping your finger horizontally across the Item on the Items List screen C and then pressing the Delete button. This will immediately delete the Item.

Note: If you have inadvertently deleted an Item you will have to re-add to your Items List (see the <u>Adding New Items</u> section of this User Guide). But remember, if that Item was in existing Inventories, it will not automatically be added back into the Inventories when you re-add the Item.

11:39 AM				우 🛿 100% 💼
K Barkeep	Ite	ms		
٩				Cancel
Alphabetical			By Catego	ry
Absolut 1 Liter Bottles				0
Absolut Citron Vodka 1 Liter Bottles				۲
Absolut Grapefruit 1 Liter Bottles				۲
t Mandarin Vodka Bottles				C Delete
Absolut Pear Vodka 1 Liter Bottles		-		۲
Absolut Vanilla Vodka 1 Liter Bottles				۲
Amaretto Di Gaetano 1 Liter Bottles				۲
Amstel Light 12 oz Bottles				۲
Ananas Bier 1 Each Bottles				۲
Angostura 1919 750 ml Bottles				۲
Angry Orchard Crisp Apple 12 oz Bottles				۲
Arrow Cinnamon Schnapps 1 Liter Bottles				۲
Arrow Cr De Banana 750 ml Bottles				۲
Arrow Cream de Cacao 1 Liter Bottles				۲
Cancel Batch Items	Û	Filter		+ Done

Inventories

Barkeep allows you to create six different types of Inventories.

Full Inventories

Used to track how much of each product you have at a given point in time. Full Inventories can contain data for one or more Locations. You can also start a Full Inventory as a Repeat Inventory, but Barkeep still classifies a Repeat Inventory as a Full Inventory, it's not a different type.

Transfer Inventories

Used to track when liquor is moved between Locations. A Transfer Inventory has a single FROM Location, which tracks the Location that Items are moved out of. A single Transfer Inventory can transfer Items TO multiple Locations.

Waste Inventories

Used to track when liquor is lost rather than used. If waste or breakage occurs, you <u>must</u> do a Waste Inventory.

For example, if a case of **Budweiser** was dropped in the **Walk-in Cooler** on the morning before the final Full Inventory, you need to do a Waste Inventory to show what happened to that product. Waste Inventories differentiate between liquor that has been wasted or lost and liquor that has been sold. They are crucial for determining an accurate Pour Cost.

Empties Inventories

Used to track the empty bottles at the end of the night. Empties Inventories have no effect on your Usage Reports. However, you can compare the Empties totals to Usage totals to track discrepancies. If you do Full Inventories less frequently, Empties Inventories can also be useful when running an Order Report.

Receiving Inventories

Used to track when you receive liquor from Suppliers. They allow Barkeep to track how much liquor is purchased which is crucial for tracking Usage over time.

Return Inventories

Used to track when liquor is returned to the Supplier. Items on this Inventory will typically match up to Credit invoices from your Supplier.

Note regarding Banquet Inventories: You can create Waste, Empties, Receiving, and Return Inventories when using Barkeep's Banquet features. When an Inventory is created as part of a Banquet it is referred to as a Banquet Inventory. For example, you may create a Banquet Receiving Inventory, Banquet Return Inventory, Banquet Transfer Inventory, etc. The difference between a regular Inventory and a Banquet Inventory is that the Banquet Inventory is used within the context of the Banquet and is contained within a specific Banquet event. See the **Banquet User Guide** for further instructions.

continue to the next page for instructions on starting an Inventory

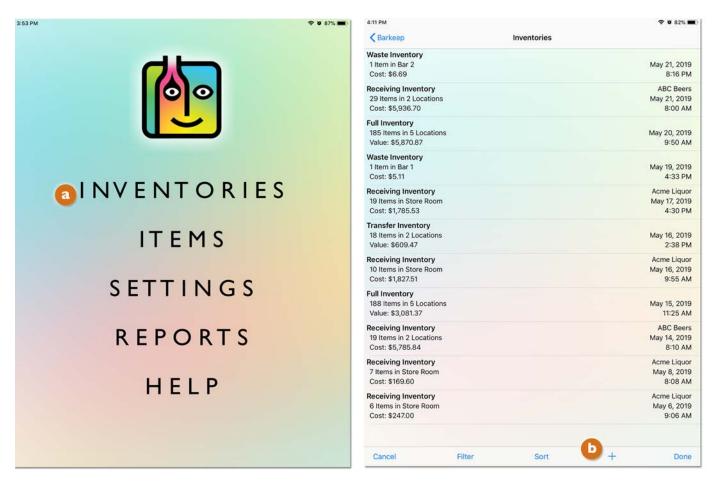
Starting Inventories

Full Inventories and other Inventories

The instructions below show examples for creating a new Full Inventory. The beginning steps are the same for all Inventories. On the following pages there are instructions for adding Items, adding cases, changing Locations, editing your Inventory, weighing bottles, etc. These instructions are the same for all Inventory types.

To create an Inventory:

- I. Press Inventories on the Main Screen <a>2 to go to the Inventories screen. *
- 2. Next, press the <u>+</u> icon on the bottom toolbar on the Inventories screen **b** to create a new Inventory.



Barkeep Tip: Try starting with a test Inventory. Before you do your first "official" Inventory, you can do a few, small practice Inventories to get accustomed to using Barkeep. Just be sure to delete the test Inventories when you're finished so they do not remain in your data permanently.

* For more details see the section on the **Inventories Screen**.

Starting Inventories (cont.)

- 3. On the pop-up Inventory Type screen, C choose the type of Inventory you would like to create. **Note:** The default is a Full Inventory.
- **4.** You can also set various details for the Inventory like the Date/Time the Inventory was taken, a general description of the Inventory, etc. For an explanation of each of these properties, see the **Editing Inventories** section.
- 5. Press Start Inventory (1) to save the new Inventory or select Cancel to discard it.
- 6. After you have saved and started the new Inventory you will automatically navigate to the Inventory screen where you can begin adding e Items to your Inventory by scrolling, searching or scanning.

4:28 PM		🗢 🖉 82% 🔳)	4:28 PM	🗢 🖲 82% 📖)
〈 Barkeep	Inventories		Location: Bar 1	×
Full Inventory 0 Items in 0 Locations Value: \$0.00	Inventory Type	May 23, 2019 4:27 PM	Aphabetical	By Category
Waste Inventory 1 Item in Bar 2 Cost: \$6.69	Full Receive Waste Transfer Empties Return	May 21, 2019 8:16 PM	100 Pipers Scotch 1 Liter Bottles Absolut Liter Bottles	+1
Receiving Inventory 29 Items in 2 Locations Cost: \$5,936.70	Date 5/23/19, 4:27 PM Edit Description	ABC Beers May 21, 2019 8:00 AM	Absolut 750 ml Bottles Absolut Citron Vodka	+1
Full Inventory 185 Items in 5 Locations Value: \$5,870.87	Notes Edit	May 20, 2019 9:50 AM	Absolut Citron Volka Absolut Mandarin Volka Absolut Mandarin Volka	+1
Waste Inventory 1 Item in Bar 1 Cost: \$5.11		May 19, 2019 4:33 PM	Absolut Vanilla Vodka Liter Bottles Amaretto Di Gaetano	+1
Receiving Inventory 19 Items in Store Room Cost: \$1,785.53		Acme Liquor May 17, 2019 4:30 PM	1 Liter Bottles Amstel Light 12 oz Bottles	+1
Transfer Inventory 18 Items in 2 Locations Value: \$609.47		May 16, 2019 2:38 PM	Anchor Steam Beer 12 oz Bottles Anchor Steam Singles 22 Oz Bottle	+1
Receiving Inventory 10 Items in Store Room Cost: \$1.827.51	Cancel d Start Inventor	Acme Liquor May 16, 2019 9:55 AM	22 oz Bottles Angostura 1919 750 ml Bottles	+1
Full Inventory 188 Items in 5 Locations Value: \$3,081.37		May 15, 2019 11:25 AM	Angry Orchard Crisp Apple 12 oz Bottles AFOLDOPE RIDGE - CHARDONNAY 2005 AFOLDOPE RIDGE - CHARDONNAY 2005	+1
Receiving Inventory 19 Items in 2 Locations Cost: \$5,785.84		ABC Beers May 14, 2019 8:10 AM	750 ml Bottles APRICOT SCHNAPPS - MARILLEN 700 ml Bottles	+1
Receiving Inventory 7 Items in Store Room Cost: \$169.60		Acme Liquor May 8, 2019 8:08 AM	Arrow Cream de Cacao 1 Liter Bottles Arrow Creme de Menthe Liter Bottles	+1
Receiving Inventory 6 Items in Store Room		Acme Liquor May 6, 2019	i B & B Liqueur 1 Liter Bottles	+1
Cancel	Filter Sort	+ Done	Cancel	Done

Note: The Support Section on the Barkeep website has a document with Inventory Tips.

continue to next page for detailed instructions on adding Items to your Inventory

Adding Items to Inventories

Adding an Item to an Inventory in BarkeepApp is essentially telling BarkeepApp that there is a certain quantity of a specific Item in a specific Location at a given time.

There are two ways to add Items to an Inventory:

- By Name You can scroll/search and add Items by name
- By Scanning You can scan the Item's barcode

We suggest trying both methods and deciding which one works best for you. We've found that, in general, entering Items by name is faster than scanning barcodes. However, if you have a large wine collection and there are subtle differences in the name of different wines, then you may find that scanning the bottles is best to insure accuracy.

Quick Add to Inventories

The Quick Add feature lets you immediately add a quantity of one (1) bottle when scrolling through their list of Items. Simply press the green 1 button. An alert will sound and a pop-up confirms which Item will be added to the Inventory. Press Done b or simply wait a moment and the Item will be added automatically. Or, select Cancel to stop the Item from being added to the Inventory.

- If you need to add a different quantity, add a case(s) and/or weigh a bottle, do not press _____.
 Select the Item and add the quantity or weight in the regular pop-up screen.
- You cannot add cases with the green +1 button.
- If you accidentally add an Item with the green +1 button, you can simply delete that Item from the Inventory.
- If you wish to disable the Quick Add feature, you can turn it off **G** in the General Settings.

Location: Walk-in Cooler Cancel Cancel General & Report Settings Q. Find Item Cancel General Settings General Settings	
Concert Settings	
General Settings	
Alphabetical By Category General Settings	
1 Bogle Pinot Noir +1 Bar Name Market Street Bar	
1 Bohemian Highway Merlot +1 Email manager@marketstreetbar.com	
Bols Coffee Liqueur +1 Contact Jane Manager 11 Liter Bottles +1 Weight Format 99.9 Oz (Weight) 10	Edit
Bols Creme de Cacao	Edit
1 Bols Creme de Cassis +1 Volume Format 9.99 Fluid Oz	Edit
1 Bols Sloe Gin 1 Liter Bottles +1	Edit
1 Bombay Dry Gin 1 Liter Bottles +1 Enter Case Prices Support Banquets	
Bombay Sapphire Bombay Sapphire has been automatically added to your Inventory. Inventory QuickAdd	
Borsodi Bivaly 500 ml Bottles Cancel Done +1 Beport Settings	
Bounty Cellars Pinot Noir Bounty Cellars Pinot Noir 750 ml Bottles +1	
1 Brennan's Irish Whiskey +1 Email Reports Show Oz	\bigcirc
Bud Light 12 oz Bottles +1 Generate HTML Reports Show Liters	
Budweiser 12 oz Bottles +1	
Budweiser Keg +1 Use Default Item Price Show Retail Value +1 Show Item Codes Show Pricing Details	
Bulleit 95 Rye 750 ml Bottles +1	
1 Bulleit Bourbon +1	
1 Bushmill's +1	
Cancel Done Cancel	Save

Note: When pressing the green **+1** button, Barkeep will add a quantities of one (1) bottle unless the container type for the Item is specified as a can, keg, box, etc. For example, when you press the green **+1** button next to **Guinness Keg**, Barkeep will automatically add the quantity of one (1) keg.

Guinness Keg
 13.2 Gallon Keas
+1

Adding the same Item multiple times to an Inventory

Can an Inventory have more than one entry for the same Item?

Yes. Barkeep does the math and calculates all your totals. Below is an example showing a single Inventory with multiple entries for the same Items.

- When you have bottles of the same Item in different Locations (e.g., Bar 1, Bar 2, etc.), you enter them separately.
- If you weigh bottles, you will need to make separate entries for full bottles and an entry for <u>each</u> individual partial bottle.
- C When you enter partial bottles you should add each one separately. We do not recommend manually adding up partial bottles into one entry.

For example, if you have two partial bottles of **Dewar's White Label**, one that is .2 Bottle and one that .65 Bottle, do not create a single entry with an amount of .85 Bottles. Add each bottle separately.

If you have full bottles and just <u>one</u> partial bottle, you could have an entry such as Dewar's White Label 2.5 Bottles.

12:41 PM	Full Inventory May 27, 2019 12 Items Value: \$1,468.97	२ 83% ■
Bar 1: 4 Items a Dewar's White Label Scotch		2 Bottles
1 Liter Bottles		\$57.50
Dewar's White Label Scotch 4 1 Liter Bottles	20	28 Oz (Weight) \$8.08
Dewar's White Label Scotch 🤳 1 Liter Bottles		47.5 Oz (Weight) \$20.67
Dewars 18 Yr Special Reserve 750 ml Bottles		1 Bottles \$63.45
Bar 2: 3 Items		
Dewar's White Label Scotch 1 Liter Bottles		0.2 Bottles \$5.75
Dewar's White Label Scotch 1 Liter Bottles		0.65 Bottles \$18.69
Dewar's White Label Scotch 1 Liter Bottles		3 Bottles \$86.25
Bar 3: 1 Item		
Dewar's White Label Scotch 1 Liter Bottles		2.5 Bottles \$71.88
Store Room: 4 Items		
Dewar's 12yr Special Reserve 1 Liter Bottles	g	f 6 Bottles \$172.50
Dewar's White Label Scotch 1 Liter Bottles		7 Bottles \$201.25
Dewar's White Label Scotch Cases of 12 1 Liter Bottles		2 Cases of 12 \$690.00
Dewar's White Label Social 750 ml Bottles	b	3 Bottles \$72.96
<u>ф</u>	Sort Edit	+ Done

If you have full cases and bottles in the same Location, you should always have separate entries for the cases and the bottles.

🚺 If you have an open case with 6 bottles, enter 6 Bottles. <u>Never</u> add a partial entry such as .5 Cases.

B When you are entering a family of products (e.g., **Dewar's**) it is crucial to have separate Items in Barkeep and separate Inventory entries for each variety (**Dewar's White Label, Dewar's 12yr Special Reserve**, etc.) Scanning barcodes can help avoid this mistake.

If you carry more than one size of the same Item/product (e.g., **1I, 750mI**, etc.) you <u>must</u> have separate Items in Barkeep and separate entries for each variety.

Note: You can have an Inventory where some partial bottles are weighed, and some are estimated partial amounts. In other words, if you weigh partial bottles you do not have to weigh all the partial bottles

Adding Items by Name

To enter Items by name, go to the Inventory that you want to add Items to.

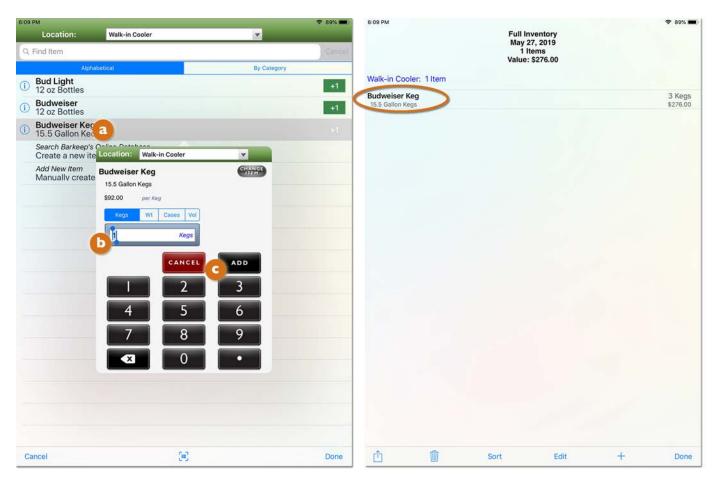
- I. On the Inventory screen, press the + icon on the bottom toolbar. @
- 2. Begin by typing the Item name in the search box at the top of the screen. Dypically, within two or three characters BarkeepApp will narrow the list down to the Item(s) that you want.
- **3.** If the Item that you want doesn't appear in the List, you can choose to add it now by selecting: Add New Item or Search Barkeep's Online Database
- **4.** Or you may scroll through the Items List **G** and select Items to add.
- 5. You can press the 💶 button 🧿 for the Item to add a quantity of 1.
- 6. If you need to add a quantity other than 1, choose the Item, ^(e) you will be taken to the pop-up Inventory Item screen. Continue to next page.

Note: The top of the screen has a drop down menu where you can assign or change a Location **(**) for the Item you are adding to the Inventory. You can add Items to multiple Locations in a single Inventory by adding Items to one Location, selecting another Location, and then adding more Items to the Inventory at the second Location.

6:07 PM	🗢 90% 🔳	6:08 PM		🗢 90% 📖)
Full Inventory		Location:	Bar 1	<u> </u>
May 27, 2019 0 Items		b Item	Bar 1	1 Cancel
Value: \$0.00		Alphabel	Bar 2	
		10000000	Bar 3	Category
		Absolut 1 Liter Bottles	Store Room	+1
		Absolut	Walk-in Cooler	
		(i) 750 ml Bottles		+1
		(i) Absolut Citron Vo 1 Liter Bottles	odka	+1
		Absolut Grapefru 1 Liter Bottles	it	+1
		(i) Absolut Mandarir 1 Liter Bottles	n Vodka	+1
		Absolut Pear Vod 1 Liter Bottles	ka	+1
		Absolut Vanilla V	odka	+1
		Amaretto Di Gaet 1 Liter Bottles	ano	+1
		Amstel Light 12 oz Bottles		+1
		Anchor Steam Be 12 oz Bottles	er	+1
		(i) Anchor Steam Sin 22 oz Bottles	ngles 22 Oz Bottle	+1
		Angostura 1919 750 ml Bottles		+1
		Angry Orchard Co 12 oz Bottles	risp Apple 🕒	d +1
		Arrow Cream de O 1 Liter Bottles	Cacao	+1
		Arrow Creme de l 1 Liter Bottles	Menthe	+1
		B & B Liqueur 1 Liter Bottles		+1
		(i) Bacardi 151 1 Liter Bottles		+1
🖞 🔟 Sort Edit 🎱 🕂	Done	Cancel	(Done

Adding Items to Inventories (cont.)

- 1. After choosing an Item, <a>
 you will be taken to the pop-up Inventory Item screen.
- Enter a quantity D and press C the button.
 Notice that the product you are adding and the Location that the product will be added to are displayed at the top of the screen.
- 3. Once you've entered a quantity and pressed the button, BarkeepApp will add the Item to your Inventory with the specified quantity at the chosen Location and return you to the Items list.
- 4. Repeat this until you have added all of your Items to the current Location.



5. When you are finished adding Items to the first Location in your Inventory, you can then move onto the next Location. When you add the first Item in a different Location go to the top of the screen and use the drop down menu to change the Location for the Item you are adding to the Inventory. Also, if you continue adding more Items to the Inventory, the Items will be added to your newly selected Location until you change to a different Location. (see previous page).

Adding Items by Scanning

You can scan barcodes with your iPad's built-in camera or an optional scanner.

To begin entering Items by scanning:

- I. Go to the Inventory that you want to add Items to.
- 2. Press the + icon on the bottom toolbar on the Inventory screen \bigcirc to add an Item.
- 3. On the Inventory screen, the scan icon in the bottom toolbar. \bigcirc
- 4. Pressing the scan icon will activate:
 - a. The Infinea Tab scanner if one is attached, or
 - b. Your **iPad**'s camera.[‡]
- 5. The instructions for using an Infinea Tab scanner are slightly different than when using your iPad's camera.
- 6. Go to the Infinea Tab Instructions or to scan with the built-in camera see next page.

6:50 PM			👻 74% 🔳	6:39 PM			중 76% ■
	Full Inventor May 27, 201			Location:	Bar 1	*	
	17 Items Value: \$268.3	20		Q. Find Item			Cancel
Bar 1: 17 Items				CONTROL CONTROL	abetical	By Category	_
Absolut			1 Bottles	Absolut 1 Liter Bottles			+1
1 Liter Bottles			\$25.50	Absolut 750 ml Bottles	LINE RULE	1118/108 283	+1
Absolut Mandarin Vodka 1 Liter Bottles			0.8 Bottles \$19.20	Absolut Citror			
Absolut Vanilla Vodka			0.2 Bottles \$4.80	1 Liter Bottles	80432	40063 0 21	+1
B & B Liqueur 1 Liter Bottles			1 Bottles \$36.40	Absolut Grape 1 Liter Bottles			+1
Bacardi 151 1 Liter Bottles			0.16 Bottles	Absolut Mand 1 Liter Bottles		Auto Add 1 Bottle	+1
Bacardi Gold 1.5 Liter Bottles			0.8 Bottles \$26.00	(i) Absolut Pear \ 1 Liter Bottles		Done	+1
Beefeater Dry Gin 1 Liter Bottles			0.52 Bottles \$11.11	Absolut Vanilla 1 Liter Bottles	Vodka		+1
Bombay Dry Gin 1 Liter Bottles			1 Bottles \$24.15	Amaretto Di Ga 1 Liter Bottles	ietano		+1
Brennan's Irish Whiskey 1 Liter Bottles			0.25 Bottles \$4.38	Amstel Light			+1
Canadian Club 6 Yr 1 Liter Bottles			0.24 Bottles \$4.55	 12 oz Bottles Anchor Steam 	Beer		
Captain Morgan Spiced Rum			0.9 Bottles \$15.63	12 oz Bottles			+1
Jack Daniels			0.8 Bottles \$21.40	22 oz Bottles	Singles 22 Oz Bottle		+1
Jameson 1 Liter Bottles			0.5 Bottles \$11.79	Angostura 1919 750 ml Bottles	9		+1
Myers Dark Rum			1 Bottles \$19.45	Angry Orchard 12 oz Bottles	Crisp Apple		+1
Seagram's 7 Crown 1 Liter Bottles			0.3 Bottles \$4.25	Arrow Cream d 1 Liter Bottles	e Cacao		+1
Southern Comfort 1 Liter Bottles			0.8 Bottles \$14.96	Arrow Creme d 1 Liter Bottles	e Menthe		+1
Tanqueray Gin 1 Liter Bottles			1 Bottles \$21.20	(i) B & B Liqueur 1 Liter Bottles			+1
		-		(i) Bacardi 151 1 Liter Bottles	-		+1
ů 🛈	Sort	Edit a	+ Done	Cancel	•	(a)	Done

continue to the next page for additional instructions

[‡] If you do not have a scanner attached and/or you have an original **iPad** without a camera, The feature is disabled.

Adding Items to Inventories by Scanning (cont.)

Scanning with the iPad Camera

Barkeep supports scanning Items using the **iPad**'s built-in camera. To scan with your camera, follow these steps:

- I. On the Inventory screen, the scan icon in the bottom toolbar to activate the camera.
- 2. Hold the iPad camera up to the barcode until the barcode is centered in the pop-up screen.
- 3. Once the barcode has been scanned, <a>[2] BarkeepApp will match the barcode against products in your Items List.
- **4.** After the barcode is scanned and a matching Item is found, BarkeepApp will automatically go to the Inventory Item screen.
- 5. The default quantity of 1 appears (you can change the quantity).
- 6. Press the button to add the Item to your Inventory. BarkeepApp will add the Item to your Inventory with the specified quantity at the chosen Location (e.g., **Bar 1**) and return you to your Items list. If you inadvertently re-scan the same Item, simply press the chosen Location and it will not be added to the Inventory.

Location: B	ar 1		76% 🔳 6:41 P	Location:	Bar 1	v	♥ 76%
L Find Item			Cancel	d Item			Can
Alphabetical		By Category		Alpha	abetical	By Category	
Absolut 1 Liter Bottles				Absolut 1 Liter Bottles	Location: Bar 1		+1
Absolut 750 ml Bottles		<u>ai</u>	+1	Absolut 750 ml Bottles	Glenlivet Scotch 12Yr 750 ml Bottles	CHANGE	+1
Absolut Citror 1 Liter Bottles	0 ¹¹ 80432 ¹ 40063 ¹⁰ 0			Absolut Citron 1 Liter Bottles	\$58.50 per Bottle		+1
Absolut Grape			+1 (1)	Absolut Grapef 1 Liter Bottles	Bottles Wt Cases Vol		+1
Absolut Mand 1 Liter Bottles			+1	Absolut Manda 1 Liter Bottles	Bottles		+
Absolut Pear \ 1 Liter Bottles		a Done		Absolut Pear Vo 1 Liter Bottles	CANCEL	ADD	+1
Absolut Vanilla Vod 1 Liter Bottles	ka			Absolut Vanilla 1 Liter Bottles	2	₽ <u>3</u>	+
Amaretto Di Gaetan 1 Liter Bottles	0			Amaretto Di Ga 1 Liter Bottles		6	+
Amstel Light 12 oz Bottles			+1	Amstel Light 12 oz Bottles	7 8	9	+
Anchor Steam Beer 12 oz Bottles			+1	Anchor Steam			+
Anchor Steam Singl	les 22 Oz Bottle			Anchor Steam			+
Angostura 1919 750 ml Bottles			+1	Angostura 1919 750 ml Bottles	9		+1
Angry Orchard Cris	p Apple		+1	Angry Orchard 12 oz Bottles	Crisp Apple		+
Arrow Cream de Ca 1 Liter Bottles	сао		+1 (1)	Arrow Cream d 1 Liter Bottles	e Cacao		+
Arrow Creme de Me	nthe			Arrow Creme d 1 Liter Bottles	e Menthe		+
B & B Liqueur 1 Liter Bottles				B & B Liqueur 1 Liter Bottles			+
Bacardi 151 1 Liter Bottles			+1 (i)	Bacardi 151 1 Liter Bottles			+
Cancel			Done Ca	ncel			Dor

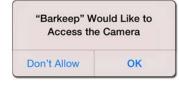
 7. What happens if Barkeep does not recognize a barcode? If the Item is not found, you will always see a pop-up menu with three choices:
 Search Barkeep Create New Item Manually Add Barcode to Existing Item

Note: While in scanning mode, you can also search for Items by name. If you are scanning many Items into Inventory and come across a particular barcode that is difficult to scan, you can simply search for it in the "Find Item" search box. G BarkeepApp will display the list of matching Items.

Scanning with the iPad Camera (cont.)

Camera Settings

The very <u>first</u> time you use your **iPad's** (or other **iOS** Device) built-in camera, you will be prompted with a pop-up message that asks: "Barkeep" Would Like to Access the Camera. You simply need to press OK.



Note: See the <u>Support Section</u> at <u>barkeepapp.com</u> for detailed instructions for **iOS** Device camera settings with BarkeepApp.

Auto-Scanning with the iPad Camera^{*}

Auto-Scanning with the built-in camera is a new feature in BarkeepApp. With auto-scanning you can switch the feature on and quickly scan and add Items to an Inventory.

To auto-scan with your built-in camera, start with the following steps:

- I. Auto-Scanning is switched off by default.
- 2. Select the scan icon <a>[] and activate the camera
- 3. Switch 🌔 the auto-scanning feature on. 🕒
- 4. Now you are ready to start entering Items using auto-scanning.

6:39 PM		중 76% ■	6:39 PM		₹ 76	%)
Location:	Bar 1	×	Location:	Bar 1	v	
Q Find Item		Gandel	Q Find Item			
Alpha	petical	By Category	Alph	abetical	By Category	
i Absolut 1 Liter Bottles		+1	Absolut 1 Liter Bottles			+1
Absolut 750 ml Bottles	1011010101010101010	+1	i Absolut 750 ml Bottles	CONTRACTOR OF A	1962	+1
Absolut Citror 1 Liter Bottles		+1	Absolut Citror 1 Liter Bottles	E . 80432'40063		+1
Absolut Grape 1 Liter Bottles		+1	Absolut Grape 1 Liter Bottles			+1
(i) Absolut Mand 1 Liter Bottles) +1	Absolut Mand 1 Liter Bottles	Auto	>→ ●	+1
Absolut Pear \ 1 Liter Bottles		Done +1	Absolut Pear \ 1 Liter Bottles		Done	+1
(i) Absolut Vanilla 1 Liter Bottles	Vodka	+1	(i) Absolut Vanilla 1 Liter Bottles	a Vodka		+1
(i) Amaretto Di Gao 1 Liter Bottles	etano	+1	Amaretto Di Ga 1 Liter Bottles	aetano		+1
Amstel Light 12 oz Bottles		+1	Amstel Light 12 oz Bottles			+1
Anchor Steam E 12 oz Bottles	Beer	+1	(i) Anchor Steam 12 oz Bottles	Beer		+1
(i) Anchor Steam S 22 oz Bottles	Singles 22 Oz Bottle	+1	Anchor Steam 22 oz Bottles	Singles 22 Oz Bottle		+1
(i) Angostura 1919 750 ml Bottles		+1	Angostura 191 750 ml Bottles	9		+1
Angry Orchard 12 oz Bottles	Crisp Apple	+1	Angry Orchard 12 oz Bottles	I Crisp Apple		+1
Arrow Cream de 1 Liter Bottles	e Cacao	+1	Arrow Cream d 1 Liter Bottles	de Cacao		+1
(i) Arrow Creme de 1 Liter Bottles	Menthe	+1	i Arrow Creme d 1 Liter Bottles	de Menthe		+1
(i) B & B Liqueur 1 Liter Bottles		+1	i B & B Liqueur 1 Liter Bottles			+1
(i) Bacardi 151 1 Liter Bottles		+1	i Bacardi 151 1 Liter Bottles			+1
Cancel	a 🕫	Done	Cancel	Ξ.	Do	one

continue to next page

^{*} Auto-Scanning occurs automatically when using an **Infinea Tab** scanner – see the next section for details.

Auto-Scanning with the iPad Camera (cont.)

- 5. As soon as Barkeep recognizes the barcode, a pop-up appears 🥝 and you have the following choices:
 - Simply do nothing, <u>ignore</u> the pop-up screen.
 In a few seconds you will hear an alert signal indicating Barkeep has added a quantity of 1 to your Inventory of the scanned Item (Glenlivet Scotch).
 Barkeep will return to the scan screen and you are ready to scan the next barcode.
 - Barkeep will return to the scan screen and you are ready to scan the
 - The pop-up screen has three optional steps:

G Edit – For example, if you wanted to change the quantity.

Save – Add the Item to your inventory and then continue scanning.

Cancel – Ignore the barcode you have just scanned and continue scanning.

6. What happens if Barkeep does not recognize a barcode?

If the Item is not found, you will always see a pop-up menu with three choices:

- Search Barkeep
- Create New Item Manually
- Add Barcode to Existing Item
- You can switch the auto-scanning feature off to disable auto-scanning.
 For example, you probably would not want to use auto-scanning when you will often select Edit because you are scanning partial bottles and need to adjust the default quantity of 1 after each scan.
 Note: We do not recommend using auto-scanning when you are scanning bottles and placing them on

your digital scale to add the weight.

6:41 PM	76% ■	6:39 PM	중 76% ■	
Location: Bar 1	*	Location: Bar 1	×	
Q Find Item	Cancel	Q Find Item	Gance	
Alphabetical By Category		Alphabetical By Category		
Absolut 1 Liter Bottles Location: Bar 1	+1	Absolut 1 Liter Bottles	+1	
Absolut 750 ml Bottles Glenlivet Scotch 12Yr 750 ml Bottles	Charles +1	Absolut 750 ml Bottles	+1	
Absolut Citron 1 Liter Bottles S58.50 per Bottle	+1	Absolut Citror Liter Bottles	+1	
i Absolut Grapef 1 Liter Bottles Wt Cases Vol	+1	Absolut Grape Absolut	+1	
Absolut Manda Liter Bottles	+1	Absolut Mand Liter Bottles	- +1	
Absolut Pear Vo 1 Liter Bottles CANCEL	ADD +1	Absolut Pear \ 1 Liter Bottles	ne +1	
i Absolut Vanilla 1 Liter Bottles	3	Absolut Vanilla Vodi Liter Bottles Glenlivet Scotch 12Yr Added Glenlivet Scotch 12Yr 1 Bottle	+1	
Amaretto Di Ga 1 Liter Bottles 4 5	6 +1	Amaretto Di Gaeta Edit Edit	+1	
Amstel Light 12 oz Bottles 7 8	9 +1	Amstel Light 12 oz Bottles	+1	
Anchor Steam I 12 oz Bottles		Anchor Steam Beer Cancel 12 oz Bottles	+1	
Anchor Steam ! 22 oz Bottles		Anchor Steam Singles 22 Oz Bottle 22 oz Bottles	+1	
Angostura 1919 750 ml Bottles	+1	Angostura 1919 750 ml Bottles	+1	
Angry Orchard Crisp Apple 12 oz Bottles	+1	Angry Orchard Crisp Apple 12 oz Bottles	+1	
Arrow Cream de Cacao 1 Liter Bottles	+1	Arrow Cream de Cacao 1 Liter Bottles	+1	
Arrow Creme de Menthe 1 Liter Bottles	+1	Arrow Creme de Menthe 1 Liter Bottles	+1	
B & B Liqueur 1 Liter Bottles	+1	(i) B&B Liqueur 1 Liter Bottles	+1	
Bacardi 151 1 Liter Bottles	+1	1 Liter Bottles	+1	
Cancel	Done	Cancel	Done	

Tip: To get used to using the auto-scanning feature, we recommend setting up a sample Inventory and practice using the feature. Just remember to delete the sample Inventory when you are finished.

Scanning Items with an Infinea Tab

You have the option to purchase an **Infinea Tab** or **Infinea Tab M** scanner. The scanners have a cradle containing a magnetic card reader and laser scanner that you slide an **iPad** into (see below for specifics). Scanners are useful for scanning barcodes on liquor bottles when taking inventory. However, a separate scanner is optional. You can also enter Items into an Inventory by name, so you do not need to scan the barcodes. Or you can use your **iPad**'s built-in camera to scan barcodes on bottles. The advantage of a laser scanner is that it usually scans faster than the camera-based scanning and some users find it easier to hold and point the scanner instead of using the camera in the **iPad**.

Barkeep has integrated with the Infinea Tab, Linea Pro and Infinea Tab barcode scanners. The Linea Pro is the same device used in all Apple Stores to scan Items and process credit card transactions.

More details on scanners and how to order them are available on our website <u>barkeepapp.com</u>.

Compatibility:

- To scan Items using the Infinea Tab scanner, you must be running BarkeepApp on an iPad 4.
- To scan Items using the Infinea Tab M scanner, you must be running BarkeepApp on an iPad Air, iPad Air 2, iPad Mini or an iPad Mini 2.
- An Infinea Tab scanner is not available for other models of the iPad.
- A Linea Pro scanner is available for the iPod Touch and iPhone
 See the iPhone User Guide for details and compatibility requirements.

Note: There are many models of the **Infinea Tab** and **Linea Pro** available. <u>Only</u> those purchased from <u>barkeepapp.com</u> are certified to work with BarkeepApp. Other models may not work with BarkeepApp and are <u>not</u> supported by Barkeep. We are not able to provide assistance with or answer questions about scanners purchased elsewhere.

Scanning Items with an Infinea Tab (cont.)

To add Items to an Inventory using an Infinea Tab scanner:

- I. Slide your iPad into your scanner.
- 2. On the Inventory screen, the scan icon <a>[0] in the bottom toolbar to activate the scanner.
- **3.** Press Done D after you have scanned the barcode or wait for Barkeep to take you to the next screen.
- 4. After the barcode is scanned and a matching Item is found, BarkeepApp will automatically go to the Inventory Item screen.
- 5. The default quantity of 1 appears C (you can change the quantity).
- 6. If you are only scanning one barcode, press the button to add the ltem to your Inventory. BarkeepApp will add the ltem to your Inventory with the specified quantity at the chosen Location (e.g., **Bar 1**) and return you to the Inventory's Items list.
- 7. If you want to continue scanning full bottles or cases, simply scan the next barcode. Barkeep will automatically add a quantity of 1 for the previous Item. You can continue scanning and adding Items by repeating this step.
- 8. You can always scan a barcode and then enter a different quantity for the Item. For example, you would not need to scan all five bottles of the same Item. You could scan once and change the quantity to 5. On the next scan, the default quantity always returns to 1.
- 9. If you inadvertently re-scan the same Item, simply press the **CANCEL** button **(**) and it will not be added to the Inventory.



What happens if Barkeep does not recognize a barcode?

If the Item is not found, you will always see a pop-up menu with three choices:

- Search Barkeep
- Create New Item Manually
- Add Barcode to Existing Item

See next page for detailed instructions.

Adding Items to Inventories by Scanning (cont.)

What if I scan a barcode and the Item is not found?

Some barcodes you scan may <u>not</u> be assigned to an Item in your Items List. When you are scanning Items in an Inventory and Barkeep does not recognize the barcode, here are the steps to follow^{*}:

- **I.** If the Item is not found, you will see a pop-up menu **a** with three choices:
 - Search Barkeep
 - Create New Item Manually
 - Add Barcode to Existing Item
- 2. If you choose Search Barkeep and the Item is found, (D) you will see an alert that the new Item has been added to your Items List.

1:43 PM Location: Bar 1	÷ ¥ 93% ■)`	1-43 PM TO 93%
Q Find Item	Cancel	Q. Find Item
Alphabetical	By Category	Alphabetical By Category
1 Liter Bottles	+1	1 Liter Bottles
Absolut 1 Liter Bottles	+1	Absolut Liter Bottles +
Absolut 750 ml Bottles	+1	Absolut 750 ml Bottles
Absolut Citron Vodka 1Liter Bottles	+1	Absolut Citron Vodka Liter Bottles +
Absolut Grapefruit 1 Liter Bottles	+1	Absolut Grapefruit Liter Bottles +
Absolut Mandarin Vodka 1 Liter Bottles	+1	Absolut Mandarin Vodka Liter Bottles
Absolut Pear Vodka 1Liter Bottles	+1	Absolut Pear Vodka 1 Liter Bottles New Item Found
Absolut Vanilla Vodka 1Liter Bottles	+1	Absolut Vanilla Vodka Liter Bottles Campari Liquer has been automatically added to your Items list
Amaretto Di Gaetano 1 Liter Bottles	+1	① Amaretto Di Gaetano 1 Liter Bottles
Amstel Light 12 oz Bottles	+1	Amstel Light 12 oz Bottles
Anchor Steam Beer 12 oz Bottles	+1	Anchor Steam Beer 12 oz Bottles
Anchor Steam Singles 22 Oz Bottle 22 oz Bottles	+1	Anchor Steam Singles 22 Oz Bottle 22 oz Bottles +
Angostura 1919 750 ml Bottles New Barcode Scanned	+1	Angostura 1919 750 ml Bottles
Angry Orchard Crisp 12 oz Bottles	+1	Angry Orchard Crisp Apple 12 oz Bottles
Arrow Cream de Liter Bottles	+1	Arrow Cream de Cacao 1 Liter Bottles *********************************
Arrow Creme de Me. 1 Liter Bottles	lly +1	Arrow Creme de Menthe 1 Liter Bottles
B & B Liqueur 1 Liter Bottles	em +1	B & B Liqueur 1 Liter Bottles
Cancel	Done	Cancel 💽 Dor

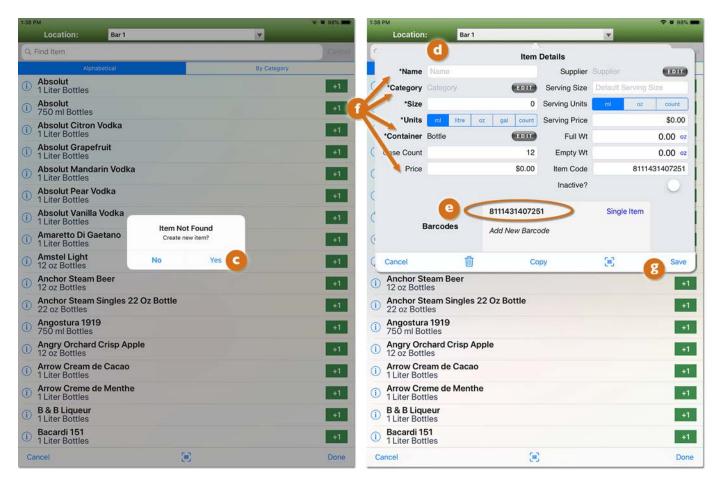
3. If you choose **Search Barkeep** and the Item is <u>not</u> found, you will see a new pop-up screen where you can make the choice to create a new Item.

^{*} The steps are the same for scanner and built-in camera.

Adding Items to Inventories by Scanning (cont.)

- 4. After the Item was not found and you see the pop-up screen, choose Yes. C
- 5. You will see a new Item Details screen 0 that only has the barcode, 9 but without other details.
- 6. Enter a Name and select a Category 🧾 and then add other details before you select Save. </u> 🛽
- 7. If you choose Create New Item Manually, you will also see a new Item Details screen 4 that has the barcode without other details. Again, add details to the Item before you select Save. 8
- 8. If you choose Add Barcode to Existing Item, you will see an Items list where you can search or scroll for the correct Item. Select the Item to add the barcode to and select Save on the Barcode details to add the barcode to the Item.

See the section on Adding Barcodes to Items for more details.

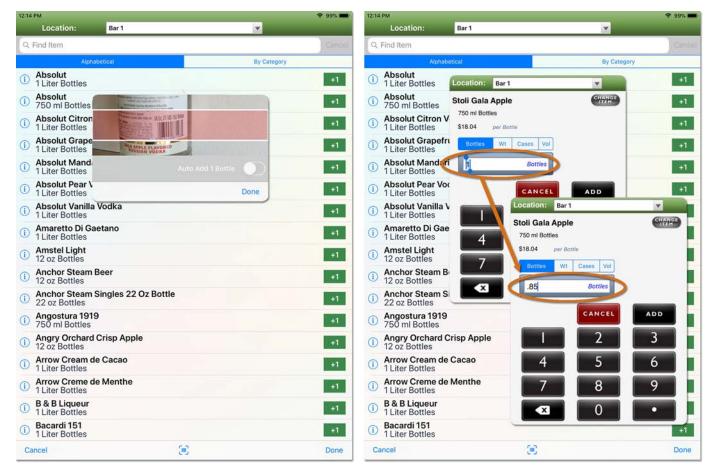


9. Important Final Step – If you Create New Item Manually or Add Barcode to Existing Item to an existing Item, this will <u>not</u> add the Item to your Inventory.
 You <u>must</u> rescan the Item to add it to your Inventory.

Adding Items to Inventories by Scanning (cont.)

Scanning Partial Bottles

With the **Infinea Tab** scanner, as well as your **iPad's** built in camera, you can scan partial bottles. The important step is to always remember to change the quantity or Barkeep will add 1 full bottle by default.



Scanning Cases

When you scan cases, be sure the barcode is a different barcode on the case than on the bottle. Most manufacturers have a barcode for a single bottle as well as a different barcode for a case. Barkeep is setup for users to assign more than one barcode for the same Item.

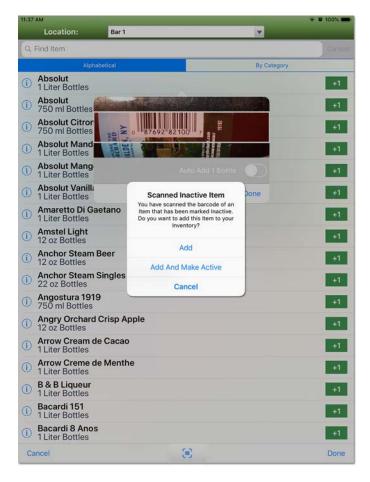
If the barcode on the case were the same as on the bottle, you would need to change the quantity when you scan a case to the case amount (e.g., 12).

Only scan full cases: We do not recommend scanning a case barcode if the case it not full. It is best to scan an individual bottle and then enter the quantity of bottles in the partial case.

See the section with detailed instructions for scanning cases and adding them to an Inventory.

^{*} The instructions on this page are the same for scanner and built-in camera.

Scanning Inactive Items



When you scan an Inactive Item to add to an Inventory you will see a pop-up alert where you can make the choice to:

> Add Add and Make Active Cancel

After you make your choice you will see the regular screen where you select the quantity for the Item.

Location:	Bar 1	~
12 oz Bottle	k Cider Apple Singles 12 s per Bottle	2 Oz Bottle
Bottles	Wt Cases Vol	
1	Bottles	
	CANCEL	ADD
	2	3
4	5	6
7	8	9
	0	•

Scanning Tips

Here are some tips on how to effectively use the scanning feature:

- Lighting Using the camera to scan doesn't work well in low-light conditions. So, make sure that you have good, even lighting.
- ✓ Avoid glare if your lighting is causing a glare on the bottle, it can wash out part of the barcode making it difficult / impossible to scan.
- Keep the bottle still We personally have trouble holding both the bottle and camera still at the same time. It will be easier to place the bottle on a counter and hold the camera up to the bottle. This works better than trying to hold both at the same time.
- ✓ Hold the bottle parallel The camera should be parallel to the bottle. If the camera is tilted at an angle, it skews the barcode and can make it difficult for BarkeepApp to recognize.
- Center the barcode The scanning works best when the barcode is centered in the viewing area on the scan Items screen and is filling the viewing area by about 70%.
- Slowly "zoom" in If holding the camera still isn't scanning the barcode, then start out with the barcode filling the viewing area at about 50% size. Then slowly move the camera towards the bottle so that the barcode increases to 70-80% will help.
- ✓ What if the barcode will not scan? Occasionally some barcodes just don't scan. It may be because the barcode is extremely long and narrow and/or curves around the bottle too much the barcode recognition package that is integrated into BarkeepApp might be unable to recognize it.

Pricing Items in Inventories

Every time that BarkeepApp calculates the cost of a product, it uses the default Item price specified at the Item level. You can override the price of an Item as you add the Item to a Receiving or Return Inventory.

Note: The Item price can only be modified in a Receiving or Return Inventory but <u>not</u> any other type of Inventory.

In Usage Reports, Barkeep determines the cost of an Item based on either:

- The amount you actually paid for the Item, or
- The default Item Price you set in Barkeep.

For example, if you have 21 bottles of **Cutty Sark** in your Starting Inventory, BarkeepApp will look at the 21 most recently received bottles of **Cutty Sark** (based on Receiving Inventories). The actual cost of the 21 bottles of **Cutty Sark** is calculated based on the price that you set in the most recent Receiving Inventories where you received **Cutty Sark** instead of the default price for the Item. See the **Usage Report** section for further details.

To override the price of an Item in a Return or Receiving Inventory, do the following steps:

- I. After choosing an Item, you will be taken to the Inventory Item screen.
- 2. Press the PRICE button.
- 3. Delete the existing price before entering a new price. \bigcirc
- 4. The price change will only be for this Item in this <u>one</u> Inventory, unless you decide to select **MAKET**. If you select to make the new price the default price, an alert will pop-up d that asks you to confirm your choice.
- 5. Press to add the Item to your Inventory and save the new price or select cancel to discard the price change.

3:49 PM			∻ 43% ∎_>	3:50 PM		? 43% I
Location:	Store Room			Location:	Store Room	×
Q Find Item			Clainceil	Q. Find Item		Can
Alphat	petical	By Category		Alphat	setical	By Category
1 Liter Bottles			*1	1 Liter Bottles		*1
Cuervo Gold 1 Liter Bottles			+1	(i) Cuervo Gold 1 Liter Bottles		+1
Cuervo Silver 1 Liter Bottles			+1	Cuervo Silver 1 Liter Bottles		+1
Cutty Sark 1 Liter Bottles				(i) Cutty Sark 1 Liter Bottles		
DeKuyper Anise 1 Liter Bottles	Location: Store Room		+1	DeKuyper Anise 1 Liter Bottles	Location: Store Room	•
DeKuyper Blue 1 Liter Bottles		Giving	+1	DeKuyper Blue 1 Liter Bottles	Cutty Sark	CHANICE +1
DeKuyper Butte 1 Liter Bottles	1 Liter Bottles \$23.57 per Bottle		+1	DeKuyper Butte 1 Liter Bottles	\$24.65 brie Falls OFFAULT	C
DeKuyper Cact 1 Liter Bottles	Bottles Wt Cases Vol		+1	DeKuyper Cact 1 Liter Bottles	Bottles Wt Cases Vol	+1
DeKuyper Cren 1 Liter Bottles	Bottles		+1	DeKuyper Cren 1 Liter Bottles	1 Bottles	+1
DeKuyper Cren 1 Liter Bottles	CANCEL	ADD	+1	i DeKuyper Cren 1 Liter Bottles	Item Price Changed The default price for item Cutty Sark has been changed to 24.65	DD +1
DeKuyper Haze 1 Liter Bottles	2	3	+1	DeKuyper Haze 1 Liter Bottles		3
DeKuyper Hot I 1 Liter Bottles	4 5	6	+1	DeKuyper Hot I 1 Liter Bottles	4 5	6
DeKuyper Melo 1 Liter Bottles	7 8	9	+1	DeKuyper Melo 1 Liter Bottles	7 8	9
(i) DeKuyper Peac 1 Liter Bottles			+1	DeKuyper Peac 1 Liter Bottles		+1
DeKuyper Pepr 1 Liter Bottles			+1	DeKuyper Pepp 1 Liter Bottles		-1
DeKuyper Rootl 1 Liter Bottles	beer		+1	DeKuyper Roott 1 Liter Bottles	beer	+1
(i) DeKuyper Sour 1 Liter Bottles	Apple Pucker		+1	DeKuyper Sour 1 Liter Bottles	Apple Pucker	+1
👝 DeKuyper Wilde	erberry			👝 DeKuyper Wilde		
Cancel) ()		Done	Cancel	E	Done

Weighing Bottles Adding and Weighing Partial Bottles, Kegs and other Containers

This section has general instructions for using any scale to weigh your bottles, kegs and other containers. This section should be reviewed before using any type of scale. This section covers the following topics with which you will have to be familiar with in order to successfully use a scale to weigh bottles for your Inventories.

- Estimating Quantity vs. Weighing Bottles
- Using the correct Weight Display Format
- Setting Full and Empty Bottle Weight
- How Barkeep calculates amounts based on Weight
- Weighing the Bottles
 - Manually Weighing the Bottles
 - Weighing the Bottles with a **Bluetooth** scale
 - Adding Multiple Entries for the same Item
 - Weighing Kegs
 - Weighing multiple Bottles of the same Item
 - Updating Full and Empty Bottle Weights
 - Weighing Bottles without Full and Empty Weights
- Setting up a **Bluetooth** Digital Scale
 - Systems Requirements for Scales
 - Setting up your Etekcity Luminary scale
 - Tips for using Etekcity Luminary scale

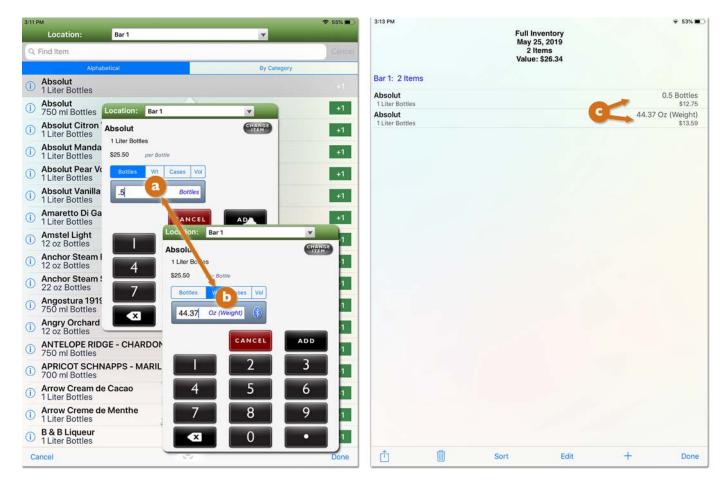
Weighing Bottles (cont.) Estimating vs. Weighing

There are two ways to count partial bottles⁴. The simplest is to enter partial bottles using decimal notation (e.g., .5). However, this method requires you to estimate how much liquor is in a bottle. This is generally okay when you're doing a Full Inventory and the margin of error is balanced out over a large quantity. But to be more accurate, you might consider weighing your bottles. If you are trying to narrow down on a specific problem area and want an extremely accurate count, you can weigh partial bottles and add the amounts by weight.

The example below shows the difference when you estimate the quantity versus weighing the bottles.

In this example, you have two bottles of Absolut. They both appear to be half full:

- I. For the first, half full bottle of **Absolut**, you simply enter .5 and a press the button to add the ltem to your Inventory.
- 2. You place the second bottle on your approved Bluetooth digital scale. 🕒
- **3.** The scale detects the weight of 44.37 oz. Press the button to add the ltem to your Inventory.
- 4. Notice how the value of each Item is different. G If you had estimated the second bottle precisely you would have had to enter .533 and not. .5 Bottles.



Note: You do not have to weigh every partial bottle, only those where you want a more precise quantity. The same Inventory can contain Items that are counted by the bottle, the partial bottle where you estimate the amount (e.g., .75) as well as Items where you weigh the bottles to get a very exact amount.

⁴ What about kegs? The most accurate way to count partial kegs is to weigh them because it is impossible to look at keg and estimate how full it is.

Adding and Weighing Partial Bottles (cont.) Using the correct Weight Display Format

Barkeep allows you to enter partial bottle weights in Pounds, Ounces and 1/8's of an ounce rather than Ounces so that you don't have to translate the data from your digital scale before entering it into BarkeepApp. In other words, you can set BarkeepApp to match the Weight Format your scale uses. You can also enter weight in 1/10's of an ounce, kilograms or grams.

We recommend setting the weight format on the scale to the weight format you use in Barkeep to make it easier to verify bottle weight as it is being read from the scale.

The example below shows you how to change your Weight Format and enter data in Pounds, Ounces, and 1/8's of an Ounce:

- Go to "Settings" and verify that you have selected the correct weight format.
 See <u>Weight and Measures Settings</u> section for details.
- 2. When adding an Item to the Inventory, choose the center Wt button.
- **3.** Enter **(()** the correct weight.
- 4. Pressing the fields will allow you to navigate as needed to enter pounds and ounces, etc.

3:54 PM			🗢 97% 🗰	3:55 PM			🗢 92% 페 ·
Karkeep	Ge	eneral & Report Settings		Location:	Bar 1	×	
0				Q Find Item			Cancel
U		General Settings		Alph	habetical	By Category	
	Bar Name	Market Street Bar		Absolut 1 Liter Bottles			
	Email	manager@marketstreetbar.com		Absolut 750 ml Bottles	Location: Bar 1		+1
	Contact	Jane Manager		Absolut Citron		CHANGE	+1
We	eight Format	99.9 Oz (Weight)	Edit	I Liter Bottles	1 Liter Bottles		+1
Keg We	ligt			Absolut Grape 1 Liter Bottles	\$25.50 per Bott		+1
Vol	um (Choose a Weight Form	nat	Absolut Mand 1 Liter Bottles	a Bottles Wt Cases V	0	+1
Keg Vol	um			(i) Absolut Pear V 1 Liter Bottles	/t Ib oz I/8		+1
Enter	Ca	99.9 oz 9 lbs 9 oz 1/10 oz		Absolut Vanil 1 Liter Bottles	CANC	ADD	+1
Inventor	y (9 lbs 9 oz 1/8 oz		(i) Amaretto Di G 1 Liter Bottles	a 🚺 2	3	+1
	4 9	9.99 Kg		i Amstel Light	4 5	6	+1
		999.9 0		Anchor Steam 12 oz Bottles			+1
Er	nai			Anchor Steam 22 oz Bottles		9	+1
Generate HT	FML			Angostura 191 750 ml Bottles			+1
Generate Rep	ort			Angry Orchard 12 oz Bottles			+1
Use Defau	Cance		Save	1 Liter Bottles	de Cacao		+1
Show	Item Codes	Show Pricing Details		Arrow Creme 1 Liter Bottles	de Menthe		+1
				B & B Liqueur 1 Liter Bottles			+1
				i Bacardi 151 1 Liter Bottles			+1
Cancel			Save	Cancel	8		Done

continue to next page

Adding and Weighing Partial Bottles (cont.)

Barkeep Tip: Check the Bottle Size

When you select an Item to weigh, be sure to check the bottle size! If your Items List has different size bottle of the same product, be sure to choose the Item with the correct size. For example, you do not want to choose **Absolut 750ml** if you are weighing an **Absolut 11** bottle.

Why does Barkeep need Full and Empty Bottle Weights?

If BarkeepApp doesn't know the weight of a full bottle and empty bottle for a particular Item, it can't determine how much of the contents are still in the bottle based on the weight of the partial bottle. A calculation using Full Bottle Weight and Partial Bottle Weight allows BarkeepApp to be highly accurate in calculating partial bottles or other container types.

5:03 PM					₱ 74% ■>	5:03 PM					🗢 74% 🖿
Karkeep		Iten	ns			< Barkeep		Iten	ıs		
۹					Cancel	Q					Cance
	Alphabetical			By Category			Alphabetical			By Category	
Sonoma Cutr	er Chardonnay					Sonoma Cutr	rer Chardonna	iy			
		Item	Details					Item	Details		
*Name	Sonoma Cutrer C	Chardonnay	Supplier	Supplier	EDIT	*Name	Sonoma Cutre	r Chardonnay	Supplier	Supplier	EDIT
Category	Premium White W	/ine EDIT	Serving Size	(ault	Serving Size	• *Category	Premium White	Wine EDIT	Serving Size	Default Se	erving Size
*Size		750	Serving Units	r	count	*Size		750	Serving Units	ml oz	count
*Units	mi liter oz	gal count	Serving Price		Service Price	t *Units	ml liter	oz gal count	Serving Price	So	rving Price
*Container	Bottle	EDIT	Empty Wt		0.00 oz 🚷	*Container	Bottle	EDIT	Empty Wt	22	.68 oz 🚷
Case Count		12	Full Wt		0.00 oz 🚷	Case Count		12	Full Wt	49	.63 oz 🚷
Price		\$29.99	Item Code		Item Code	! Price		\$29.99	Item Code	-	Rem Code
			Inactive?		0 -				Inactive?		0
!	Barcodes	76961110032		Single Item			Barcodes	76961110032		Single Item	
1		Add New Barc	ode					Add New Barco	ode		
Cancel	Ŵ	Co	ру		Save	Cancel	1	Co	ру	90	Save
1 Liter Bottles						1 Liter Bottle					
Stoli Razberi 1 Liter Bottles	s					Stoli Razberi 1 Liter Bottle					
Stoli Vanil 1 Liter Bottles	s					Stoli Vanil 1 Liter Bottle	s				
Tanqueray Gi 1 Liter Bottles						Tanqueray Gi 1 Liter Bottle					
Tia Maria 1 Liter Bottles	s					Tia Maria 1 Liter Bottle	s				
Cancel	Batch Items	ŵ	Filter	(m) +	Done	Cancel	Batch Items	ſħ	Filter	(iii) +	Done

Note: When you attempt to enter an Item by weight and the Full and Empty bottle weights are missing, BarkeepApp searches⁵ the Barkeep Database and automatically updates the Item if the weight information is in our Database.

Weights in the Barkeep Database

The Full and Empty Bottle Weights in our database are supplied to us by manufacturers, distillers and distributors. The bottle weights may vary slightly when a manufacturer makes changes to their bottle. There also might be slight variations in bottles used in different countries and regions. If you need to be absolutely precise, we recommend you double-check the Full and Empty Weight listed for your Item.

⁵ **Reminder:** The Search Barkeep feature requires an Internet connection using either Wi-Fi $\stackrel{<}{>}$ or your phone's carrier network is required.

Adding and Weighing Partial Bottles (cont.)

Full and Empty Bottle Weight

You can set the Full and Empty Bottle Weights when you add a new Item or you can return to that Item later and add those details. As with any Item details, you can add and edit information manually. After you weigh full and empty bottles, read the weight from the scale and enter the information into your Item's details. You may wish to review the <u>Editing Items</u> section for instructions on editing existing Items.

With the **Etekcity Luminary**^{*} digital scale you weigh bottles and automatically add Full and Empty Bottle Weights to an existing Item by following these instructions:

- I. Select the Item you wish to edit on your Items List.
- 2. This will take you to the Item Details screen where you can add the Full and Empty Bottle Weights for the Item.
- **3.** Place a full bottle of your Item on your **Etekcity Luminary**⁶ scale.
- **4.** Press the 🛞 button with the **Bluetooth** icon 🙆 next to the "Full Wt" field.
- 5. The Full Bottle Weight (49.63 oz) 🕒 will be automatically added to your Item's details.
- 6. Place an empty bottle of your Item on the scale.
- 7. Repeat the steps by pressing the 🛞 button 🧿 next to the "Empty Wt" field.
- 8. The Empty Bottle Weight (22.68 oz) will be automatically added to your Item's details.
- 9. Press to Save the changes or select Cancel to discard them.

Pad 🗢			6:05 PM	1		\$ 92% 📖
K Barkeep			Items	\$		
			Q			
	Alphabe	rtical			By Categor	у
Sonoma Cu 750 ml Bo		donnay				
-			Item D	Details		
Name	Sonoma	Cutrer Charc	donnay			
Category	Premium	White Wine	EDIT	Container	Bottle	EDIT
Units	ml	litre oz	gal	Supplier	Supplier	EDIT
Size			750	Item Code		Item Code
Cas	e Cnt		12	Full Wt	0-	49.63 oz 🚷
Price			\$29.99	Empty Wt		0.00 oz 🚷
			Barc	odes		
		7696111003	324	Si	ngle Item	
		Add New Ba	arcode			
Cancel		<u></u>	Сору		Scan	d Save
Vine: White	Vine					
Blue Angel 1 Liter Bot	tles					
Geyser Pea 750 ml Bo		non Blanc				
Geyser Pea 750 ml Bo		non Blanc				
James Arth	ur White					

Note: You should enter the Full and Empty Bottle Weights of a bottle including the pour spout if you plan to weigh partial bottles with a pour spout.

* **Reminder:** There are many other models of the **Etekcity** and other digital scales available.

<u>Only</u> scales purchased via <u>barkeepapp.com</u> are certified to work with BarkeepApp. Other models will not work with BarkeepApp and are <u>not</u> supported by Barkeep.

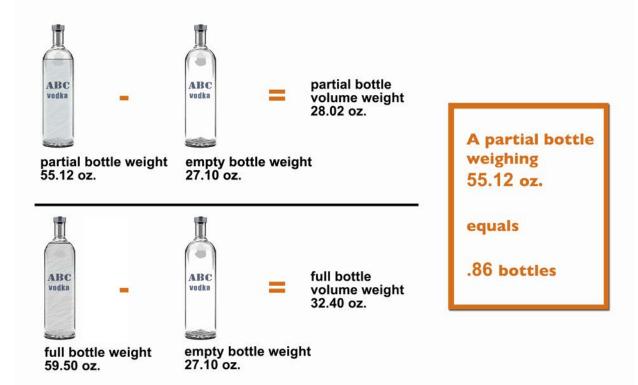
⁶ **Do you use pour spouts?** For greater accuracy, you should enter the Full and Empty Bottle Weights of a bottle including the pour spout if you plan to weigh partial bottles with a pour spout.

Adding and Weighing Partial Bottles (cont.) How does Barkeep calculate amounts based on Weight?

When you are conducting an Inventory and weigh a partial bottle, this is the formula that Barkeep uses for calculating the volume of liquor in a partial bottle:

Bottle Volume * ((Partial Bottle Weight – Empty Bottle Weight) / (Full Bottle Weight – Empty Bottle Weight))

Below is an example showing an Item that has the Full Bottle Weight and Empty Bottle Weight added into the Item Details.



What happens if I do not enter either a Full Bottle Weight nor an Empty Bottle Weight?

Ideally each partial bottle you weigh will be for an Item where you have entered the Full and Empty Bottle weights. Many Items in the Barkeep database already have Full and Empty Bottle weights by default.

BarkeepApp will allow you to enter weights of partial bottles without Full and Empty Bottle weights. You will receive a pop-up alert warning, but still be able to enter the weight information. Without Full and Empty Bottle weights added to the Item's detailed information, your results will be far less accurate. At a minimum, we recommend adding a Full Bottle weight for each Item you intend to weigh.

How does Barkeep calculate with missing bottle weights?

If there is no Full Bottle Weight information for an Item in the Item Details, Barkeep will add the Item's volume to the Empty Bottle Weight to calculate a default Full Bottle Weight.

- For example, a one quart (32 oz.) bottle will be given a Full Bottle Weight of the Empty Bottle Weight plus 32 ounces.
- A one-liter bottle will be given a Full Bottle Weight of the Empty Bottle Weight plus 33.81 ounces (1 liter = 33.81 oz.), etc.
- If there is no Empty Bottle Weight information for an Item in the Item Details, Barkeep will calculate the Empty Bottle Weight by subtracting the Item's volume from the Full Bottle Weight. If the Full Bottle Weight is also not set, then the Empty Bottle Weight will default to 0.

Adding and Weighing Partial Bottles (cont.)

Weighing the Bottles

The following pages have instructions that are for all users who weigh their bottles. Below are instructions for users who weigh their bottles with a digital scale and then enter the weight manually. The next page has instructions for users with an approved **Bluetooth** digital scale purchased from Barkeep that will enter the weight automatically into your Inventory.

Note: Multiple Bottles - See the section for entering and <u>weighing multiple bottles</u> of the same ltem.

Manually Weighing Bottles

To weigh a bottle (or another container) and manually add the amount to an Inventory:

- Select the Item.
- 2. Switch the quantity format 🕒 from Bottles to Wt.
- 3. Be sure that your Weight Format set in Barkeep matches the format used by your scale
- 4. Place your bottle on the scale.
- 5. Enter the weight of the partial bottle. 🤤
- 6. Press for add 🚺 the Item to your Inventory or cancel to discard it.



continue to next page for using a Bluetooth digital scale

Adding and Weighing Partial Bottles with a Bluetooth Digital Scale (cont.)



Are you connected to your Etekcity?

The **Bluetooth** icon 🛞 will appear next to the weight fields on the Inventory Item Entry screen to indicate that your **iPad** is communicating with your approved **Bluetooth** digital scale.

not conn	cucu				M		₹ 90%
Location:	Bar 1	*		Location:	Bar 1		
Q. Find Item			Cancel	Q Find Item			Gane
Alph	abetical	By Category		Alph	abetical	By Category	
D Absolut 1 Liter Bottles			+1	Absolut 1 Liter Bottles			
Absolut 750 ml Bottles	Location: Bar 1		+1	i Absolut 750 ml Bottles	Location: Bar 1		+1
Absolut Citron 1 Liter Bottles		CHANGE	+1	Absolut Citron 1 Liter Bottles		CHANGE	+1
Absolut Grape 1 Liter Bottles	f 1 Liter Bottles \$25.50 per Bottle		+1	Absolut Grape 1 Liter Bottles	f Liter Bottles \$25.50 per Bottle		+1
Absolut Manda 1 Liter Bottles	Bottles Wt Cases Vol		+1	Absolut Manda 1 Liter Bottles	Bottles Wt Cases Vol		+1
Absolut Pear V 1 Liter Bottles	k lb oz 1/8		+1	Absolut Pear V 1 Liter Bottles	K 10 oz 1/8		+1
Absolut Vanilla 1 Liter Bottles	CANCEL	ADD	+1	(i) Absolut Vanilla 1 Liter Bottles	CANCEL	ADD	+1
Amaretto Di Ga 1 Liter Bottles	a 2	3	+1	Amaretto Di Ga 1 Liter Bottles	^a 2	3	+1
Amstel Light 12 oz Bottles	4 5	6	+1	Amstel Light 12 oz Bottles	4 5	6	+1
Anchor Steam		9	+1	(i) Anchor Steam 12 oz Bottles		9	+1
Anchor Steam 22 oz Bottles			+1	(i) Anchor Steam 22 oz Bottles			+
Angostura 191 750 ml Bottles			+1	Angostura 191 750 ml Bottles	<u>د</u> ا		+
Angry Orchard	l Crisp Apple		+1	(i) Angry Orchard 12 oz Bottles	I Crisp Apple		+1
Arrow Cream of 1 Liter Bottles	de Cacao		+1	Arrow Cream of 1 Liter Bottles	le Cacao		+1
Arrow Creme of 1 Liter Bottles	de Menthe		+1	Arrow Creme of 1 Liter Bottles	de Menthe		+1
B & B Liqueur 1 Liter Bottles			+1	i B & B Liqueur 1 Liter Bottles			+1
Bacardi 151 1 Liter Bottles			+1	Bacardi 151 1 Liter Bottles			+1
Cancel			Done	Cancel	(Don

continue to next page for troubleshooting

Can you use more than one Etekcity Luminary at the same time? Yes. When you have more than one staff member weighing and adding Items to the same Inventory, they each can be using their own **Etekcity** digital scale.⁷ But, only one **iOS** Device can be connected to scale at a time.

If you need help managing multiple scales, please contact support@barkeepapp.com

No Connection?

If the **Etekcity Luminary** failed to configure and/or you cannot see the **Bluetooth** icon when you select to weigh bottles, below is a checklist to review:

- Make sure that your scale is on. The scale will turn off automatically after 3 minutes of inactivity.
- The scale's display will show LO to warn of a low battery.
- Make sure your iOS Device and scale are near each other.
 For example, if you leave the area where you are conducting your Inventory, it may take a moment for your iOS Device and Etekcity
 Luminary to reconnect after you return.



- ✓ The Etekcity Luminary is designed to only work with one iOS Device at a time. Check that another iOS Device is not connected to your scale. For example, if you are taking Inventory with your iPad and using the Etekcity Luminary, your iPhone should not be connected to your scale at the same time.
- Occasionally another piece of your equipment such as printer or laptop with will have Bluetooth capacity and connect to the Etekcity. You might have to shut down the interfering piece of equipment or move your scale and iOS Device to another room.
- ✓ In rare instances, an older iOS Device might detect an Etekcity Luminary, but it will not be compatible with the scale unless it is one of the newer iOS Devices with Bluetooth LE capacity.
- Verify that the iOS Device and Etekcity Luminary you are using are compatible.
 See <u>System Requirements</u>.
- ✓ If you have installed the **VeSync** app, remove it from your **iOS** Device.

Still no Connection?

After reviewing the checklist and trying these steps, if you still are unable to configure your scale, please contact Barkeep Support.

Note: If you were using early models of scales purchased through BarkeepApp (e.g., **Escali SmartConnect**) you may need to go to Settings in BarkeepApp, select Bluetooth Scale and Reset to Default.

⁷ A BarkeepOnline subscription is required for multiple staff members to work together in Barkeep.

Weighing Bottles with a Bluetooth Digital Scale (cont.)

To weigh a bottle with a **Bluetooth** digital scale^{*} and automatically add the amount to an Inventory:

- I. Select the Item. 🔕
- 2. Switch the quantity format 🕑 from Bottles to Wt.
- **3.** Be sure that your Weight Format set in Barkeep matches the format used by your scale. This is not a requirement, but it makes it easier to confirm that the scale displays the weight that is entered for your Inventory Item.
- 4. Place your bottle on the scale.
- 5. Wait a few seconds for the scale to register the partial bottle weight and until the weight display shows a constant, non-changing reading.
- 6. The Bluetooth icon 🛞 indicates Barkeep and the scale are connected.
- 7. BarkeepApp will automatically fill the quantity field with the weight that it receives from the scale.
- 8. If the partial bottle weight is not displayed after a few seconds, press the **Bluetooth** icon 🛞 to re-read the weight from the scale.
- 9. Press the button C to add the Item to the Inventory or CANCEL to discard it.



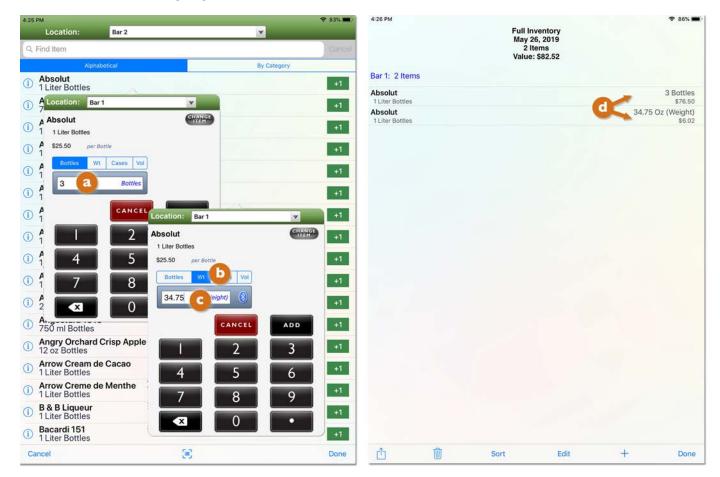
^{*} There are many other models of the **Bluetooth** digital scales available. Only those purchased via <u>barkeepapp.com</u> are certified to work with BarkeepApp. Other models will not work with BarkeepApp and are <u>not</u> supported by Barkeep. We are not able to provide assistance with or answer questions about scales purchased elsewhere.

Adding and Weighing Partial Bottles (cont.) Adding Multiple Entries for the same Item

Important: To add partial bottles by Weight, you will need to make separate entries for full bottles and an entry for each individual partial bottle.

For example, if you have three full bottles of **Absolut** and one partial bottle, you will need to:

- I. Add the 🙆 3 Bottles and press
- 2. And then add the individual partial bottle by re-selecting Absolut.
- **3.** Press the "Wt" button **b** on the Unit Selection control.
- 4. Place the partial bottle on the scale.
 - a. Weigh the bottle on a digital scale and manually enter the number of ounces 🤤 (For example, 34.75 oz.) and press the button.
 - b. Or have the Bluetooth digital scale automatically detect the weight from the scale.
- 5. Note that the Inventory now includes two Item entries for Absolut. individual bottle weighing 34.75 ounces.



Reminder: If you have a digital scale that displays weights in pounds and ounces or are using metric measurement, you can change your preferences in General Settings.

See the Weights and Measurements section for additional information.

Adding and Weighing Partial Bottles (cont.) Weighing Kegs

The instructions in this section specifically mention weighing partial bottles of liquor, but the same instructions can be used for any container type. For example, it is difficult to estimate the amount of draft beer in an open keg. Many bars use a freight scale to weigh their kegs. If you choose to do so, you can use the same instructions as you would for weighing partial bottles.

Note: The maximum weight that can be placed on the **Etekcity Luminary** scale is 10kg or 22 lbs. For larger Items (i.e., Kegs) you will need to use a higher capacity scale and enter the weight manually such as the **Accuteck** keg scale available at <u>barkeepapp.com</u>.

See the **<u>Support Section</u>** at <u>barkeepapp.com</u> for additional information on <u>Managing Kegs</u>.

Weighing and Scanning Bottles

When you are weighing bottles, you can also choose the Items you will weigh by scanning them.

To weigh and scan a bottle and automatically and add the amount to an Inventory:

- I. Place the bottle on the scale.
- Scan the barcode. You can use an optional scanner or your iPad's built-in camera.
 Note: If you are using the built-in camera, we recommend you turn off auto-scanning.
- 3. If the barcode is successfully scanned, switch the quantity format <a>[3] from Bottles to Wt.
- **4.** The **Bluetooth** icon (3) indicates Barkeep and the scale are connected.
- 5. BarkeepApp will automatically fill the quantity field with the weight that it receives from the scale.
- 6. Press the button button to add the Item to the Inventory or cancel to discard it.

12:14 PM		🗢 99% 💼	12:14 PM			🗢 99% 💼
Location: Ba	r1 💌		Location:	Bar 1	*	
Q. Find Item		Cancel	Q Find Item			
Alphabetical	By Category		Alpha	abetical	By Category	
(i) Absolut 1 Liter Bottles		+1	Absolut 1 Liter Bottles	Location: Bar 1	*	+1
Absolut 750 ml Bottles	A Research of the second	+1	i Absolut 750 ml Bottles	Stoli Gala Apple	CHANGE	+1
Absolut Citron 1 Liter Bottles	A CONTRACTOR OF A CONTRACTOR O	+1	Absolut Citron 1 Liter Bottles	\$18.04 per Bottle		+1
Absolut Grape 1 Liter Bottles	MARAPPLE FLAVORED RESEAR VODRA	+1	Absolut Grapet 1 Liter Bottles	fr Bott Wt Cases Vol		+1
(i) Absolut Manda 1 Liter Bottles	Auto Add 1 Bottle	+1	Absolut Mand 1 Liter Bottles	(C 36.68 Oz (Weight) (8)		+1
Absolut Pear V 1 Liter Bottles	Done	+1	(i) Absolut Pear V 1 Liter Bottles	CANCEL	ADD	+1
(i) Absolut Vanilla Vodk 1 Liter Bottles	a	+1	(i) Absolut Vanilla 1 Liter Bottles	2	3	+1
Amaretto Di Gaetano 1 Liter Bottles	0	+1	Amaretto Di Ga 1 Liter Bottles	a 4 5	6	+1
Amstel Light 12 oz Bottles		+1	Amstel Light 12 oz Bottles	7 8	9	+1
Anchor Steam Beer 12 oz Bottles		+1	Anchor Steam 12 oz Bottles			+1
Anchor Steam Single 22 oz Bottles	es 22 Oz Bottle	+1	Anchor Steam 22 oz Bottles	s		+1
Angostura 1919 750 ml Bottles		+1	Angostura 1919 750 ml Bottles	9		+1
Angry Orchard Crisp 12 oz Bottles	Apple	+1	Angry Orchard 12 oz Bottles	Crisp Apple		+1
Arrow Cream de Cac 1 Liter Bottles	cao	+1	Arrow Cream d 1 Liter Bottles	le Cacao		+1
Arrow Creme de Mer 1 Liter Bottles	nthe	+1	Arrow Creme d 1 Liter Bottles	le Menthe		+1
1 Liter Bottles		+1	B & B Liqueur 1 Liter Bottles			+1
i) Bacardi 151 1 Liter Bottles		+1	i Bacardi 151 1 Liter Bottles			+1
Cancel		Done	Cancel			Done

Adding and Weighing Partial Bottles (cont.)

Weighing Multiple Bottles

Important: Always weigh <u>one bottle at a time</u>! Never add together multiple partial bottles as a single weight entry.

BarkeepApp will automatically deduct the weight of a <u>single</u> bottle to determine the quantity of liquor that remains in the bottle. If you add the weights of more than one bottle together, there is no way for BarkeepApp to know how many bottles to deduct from the weight entered.

The example below shows an instance where two partial bottles of **Absolut Vodka** were weighed and added to an Inventory:

- In the correct version, a each bottle was weighed one at a time. The weight of each bottle was entered manually or automatically using an approved **Bluetooth** digital scale.
- In the second, incorrect version, b both bottles were placed on the scale together. The total weight of both bottles was entered manually or automatically using an approved Bluetooth digital scale.

a correct			🕒 in	correct				
4:28 PM	Full Inventory May 26, 2019 2 Items Value: \$5.42	ę	* 84% 🔳) 4:28 PM		Full Inve May 26, 1 Item Value: \$2	ntory 2019 15 25.50		∻ 85% ■)
Bar 2: 2 Items			Bar 2: 1 Ite	m				
Absolut 1 Liter Bottles		32.03 Oz (W	Absolut \$3.88 1 Liter Bottles	5			61.8 C	z (Weight) \$25.50
Absolut 1 Liter Bottles		29.05 Oz (W	/eight) \$1.54		K			
<u>Ô</u>	Sort Edit	+	Done	1	Sort	Edit	+	Done

Also note that the total value of both Items is shown as \$5.42 in the correct version above. When the bottles are weighed incorrectly and b both bottles are placed on the scale together, the volume amount (quantity) will be incorrect. The value shown in the incorrect version is \$25.50 Incorrect amounts in your Inventories cause your Reports to be inaccurate.

Adding and Weighing Partial Bottles (cont.)

What happens when Bottle Weights are missing?

BarkeepApp will allow you to enter weights of partial bottles without Full and Empty Bottle weights. You will receive a pop-up alert warning, but still be able to enter the weight information. First BarkeepApp will search for missing bottle weights in the Barkeep Database. If the Full and Empty Bottle Weights are still missing, you will receive a warning but still be allowed to enter the weight manually or with the **Bluetooth** digital scale.

Without Full and Empty Bottle weights added to the Item's detailed information, your results will be far less accurate. At a minimum, we recommend adding a Full Bottle weight for each Item you intend to weigh.

Weighing Items and Updating Bottle Weights

Below is an example to show what happens when an Item is weighed and there is either a missing Empty Bottle Weight, Full Bottle Weight or both:

- I. You can weigh the bottle and enter the weight manually or have the **Bluetooth** digital scale automatically detect the weight from the scale.
- 2. When your press the button, a you will get a warning if the Item is missing Full and Empty Weights.
- 3. In this example, BarkeepApp has automatically searched the Barkeep Database and updated the Item with the missing Full and Empty Bottle Weights.

See the next page for what happens if Barkeep does not update the missing weights.

4. Press "Ok" to finish adding the Item to your Inventory.

4:41 PM			🗢 82% 🔳)	4:41 PM		🗢 82% 📖 ·
Location:	Bar 2			Location:	Bar 2	Y
Q Find Item			Claincial	Q. Find Item		Cancel
Alş	ohabetical	By Category		Alphabe	tical	By Category
Campari Liqu 750 ml Bottles	er S		+1	Campari Liquer 750 ml Bottles		+1.
i Cinzano Extra 1 Liter Bottles			+1	Cinzano Extra Dr 1 Liter Bottles	У	+1
(i) Cinzano Ross 1 Liter Bottles	Campari Liquer	CHANGE	+1	(i) Cinzano Rosso 1 Liter Bottles		+1
Dubonnet Re 1 Liter Bottles	d		+1	Dubonnet Red 1 Liter Bottles		+1
Dubonnet Wh 1 Liter Bottles	hit Bottles Wt Cases Vol		+1	① Dubonnet White 1 Liter Bottles		+1
Liquor : Call Liquor :	C 36.68 Oz (Weight) (8)			Liquor : Call Liquor : Call	Gin Warning: Item Missing Full /	
i) Beefeater Dry 1 Liter Bottles		ADD	+1	1 Liter Bottles	1 Empty Weights You have entered a quantity by weight	+1
(i) Bombay Dry (1 Liter Bottles		3	+1	(1) Bombay Dry Gin 1 Liter Bottles	for an Item which has no full or empty bottle weight defined. We have automatically downloaded the full &	+1
Tanqueray Gi 1 Liter Bottles	n	6	+1	Tanqueray Gin 1 Liter Bottles	empty bottle weights from our database and applied them to your item.	+1
Liquor : Call Liquor :	c			Liquor : Call Liquor : Call	Rum Ok D	
Bacardi 151 1 Liter Bottles	7 8	9	+1	Bacardi 151 1 Liter Bottles		+1
i Bacardi 8 And 1 Liter Bottles	os 💌 O	•	+1	(i) Bacardi 8 Anos 1 Liter Bottles		+1
i) Bacardi Ciclo 1 Liter Bottles	n		+1	Bacardi Ciclon 1 Liter Bottles		+1
(i) Bacardi Gold 1.5 Liter Bottle	es		+1	Bacardi Gold 1.5 Liter Bottles		+1
i Bacardi Lemo	on		+1	(i) Bacardi Lemon 1 Liter Bottles		+1
(i) Bacardi O 1 Liter Bottles			+1	Bacardi O 1 Liter Bottles		+1
(i) Bacardi Rum 1 Liter Bottles	Coconut		+1	(i) Bacardi Rum Coc 1 Liter Bottles	onut	+1
Deserdi Cuma			1000	Descerdi Cumanian		
Cancel			Done	Cancel		Done

What happens when Bottle Weights are missing? (cont.)

Updating Item Weights — How does it work?

When manufacturers provide us with updated weight information, we add the Full and Empty Weights to Items in our Barkeep database. If the Item you are weighing is missing its Full and Empty Bottle weights, BarkeepApp will update and add the weight information that is missing from your Item when it becomes available in the Barkeep database.

When Barkeep updates your Full and Empty Bottle weights it matches your Items by barcode and bottle size in our database. If there is no barcode, it matches your Items by exact name and bottle size. If you have added a new Item by copying an existing Item and changed the name, Barkeep will <u>not</u> add Full and Empty Weight to the new Item with an altered name. If you add an Item manually and the barcode and/or name and bottle size matches an Item in our database, Barkeep will update the Full and Empty Bottle Weights.

Will Barkeep replace my existing Full and Empty Bottle Weight Information?

No. If you have weighed a bottle and added the Full and/or Empty Bottle Weight, Barkeep will <u>not</u> change your information. For example, if you are being precise and have added Full and Empty Bottle Weight with your pour spouts attached to the bottles, Barkeep will not replace the information you have entered. Also, keep in mind that if you have estimated Full and/or Empty Bottle Weights, Barkeep will not change your existing information.

When you update your Item Weights Barkeep will only add weight information to an Item when no information exists. If you have only entered a Full Bottle Weight and do not have an Empty Bottle Weight, Barkeep will not update your Item.

BarkeepOnline – With a BarkeepOnline account you can also update your Full and Empty Bottle weights with the Update Item Weight feature. See the **BarkeepOnline User Guide** for details.

What happens to the Items in my Inventories after the weights have been updated? When you update an Item and add or change the Full and Empty Bottle Weights, Barkeep will automatically correct the results for that Item in your existing Inventories. For example, if you had been entering an Item by weight without Full and Empty Bottle weights, Barkeep would have calculated a quantity that would not have been totally accurate. Once Barkeep has the missing information, the Full and Empty Bottle Weights, Barkeep can now recalculate quantities more accurately.

What happens when Bottle Weights are missing? (cont.)

Adding Items by Weight when they are Missing Full and Empty Bottle Weights

BarkeepApp will allow you to enter weights of partial bottles without Full and Empty Bottle weights. As shown on the previous pages, Barkeep will automatically check if missing weights are available in the Barkeep Database. Here is what happens if you enter and Item and Barkeep is <u>not</u> able to add the missing Full and Empty Bottle weights:

- I. First you weigh the bottle and enter the weight manually a or have the **Bluetooth** digital scale automatically b detect the weight from the scale.
- 2. When your press the button or the button, Barkeep will attempt to update the missing Full and Empty weights.
- 3. If no weight information was found, you will get a warning the Item is missing Full and Empty Weights.
- 4. When you press Ok, (b) the partial bottle will be added to the Inventory, but the calculated amount will not be as accurate as when the Item Details included the Empty Bottle Weight and Full Bottle Weight.

This is generally okay when you're doing a Full Inventory and the margin of error is balanced out over a large quantity. But to be more accurate and focus on a specific problem area, you should add the Empty Bottle Weight and Full Bottle Weight to any Items you plan to weigh.

- 5. Without Full and Empty Bottle weights added to the Item's detailed information, your results will be as exact. At a minimum, we recommend adding a Full Bottle weight for each Item you intend to weigh.
- 6. If you have neither a Full nor Empty Bottle weight, you might have more accurate results if you enter the item without weighing it and estimate the quantity instead (i.e., .4, .5, .75, etc.).

Location:	Bar 2	♥ 80% ■.	Location:	Bar 2		×	÷ 79% ■)
Q Find Item		Cancel	Q Find Item				Cancel
Alp	habetical	By Category	Alph	abetical		By Category	
McGillicuddy's 1 Liter Bottles	s Vanilla Schnapps	+1	(i) McGillicuddy's 1 Liter Bottles	Vanilla Schnap	ps		+1
1 Merlot - Chat 750 ml Bottles	eau St. Jean Sonoma	+1	Merlot - Chate 750 ml Bottles	au St. Jean Sor	ioma		+1
i MERLOT - BAI 750 ml Bottles	Location: Bar 2	+1	(1) MERLOT - BAR 750 ml Bottles	REFOOT CALIFO	RNIA		+1
i Merlot - Sutte 750 ml Bottles	Merlot - Chateau St. Jean Sonoma	+1	① Merlot - Sutter 750 ml Bottles	Home			+1
Metaxa 750 ml Bottles		+1	① Metaxa 750 ml Bottles				+1
(i) Metaxa Ouzo 1 Liter Bottles	Bottles Wt Cases Vol	+1	① Metaxa Ouzo 1 Liter Bottles		ter her history Fait		+1
15.5 Gallon Ke		+1	15.5 Gallon Kee	en Draft	ing: Item Missing Full/ Empty Weights e entered a quantity by weight		+1
i) Michelob Ultra 12 oz Bottles	CANCEL ADD		(1) Michelob Ultra 12 oz Bottles	for an Ite Bottle V	em which has no Full or Empty Neight defined. Please set at he Full Bottle Weight for this		+1
Middle Sister 750 ml Bottles		₽ +1	(i) Middle Sister F 750 ml Bottles		Item.		+1
Midori 1 Liter Bottles	4 5 6	+1	① Midori 1 Liter Bottles		C Ok		+1
(i) Miller Beer Sin 22 oz Bottles		+1	(1) Miller Beer Sin 22 oz Bottles	gles 22 Oz Bottl	e		+1
(i) Miller Genuine 12 oz Bottles		+1	(i) Miller Genuine 12 oz Bottles	Draft			+1
(i) Miller Genuine 15.5 Gallon Ke		+1	Miller Genuine 15.5 Gallon Kee	Draft Keg			+1
i Miller Lite 12 oz Bottles		+1	Miller Lite 12 oz Bottles				+1
(i) Miller Lite Keg 15.5 Gallon Ke		+1	(i) Miller Lite Keg 15.5 Gallon Ked	ıs			+1
i MOLSON - BL 58667 ml Keas	ACK LABEL	+1	(1) MOLSON - BLA 58667 ml Keas	ACK LABEL			+1
(i) MOLSON - BL 12 oz Cans	ACK LABEL S.C.	+1	(i) MOLSON - BLA	ACK LABEL S.C.	8		+1
Cancel		Done	Cancel				Done

Setting up an Etekcity Digital Scale

You may use a digital scale to weigh bottles. If you would like to manually enter partial bottle weights into BarkeepApp, you can use any digital scale to weigh the bottles and choose the Weight Format in BarkeepApp that matches your digital scale.

Important: If you would like to have BarkeepApp automatically detect the weight of partial bottles using **Bluetooth**, you <u>must</u> purchase a certified **Bluetooth** digital scale via <u>barkeepapp.com</u>.

The **Etekcity Luminary** is the **Bluetooth** scale that will exclusively work with the latest version of BarkeepApp⁸.

The **Etekcity Luminary** digital scale does not require an additional scanner and will work with any **iOS** Device with **Bluetooth LE** capacity.

Note: There are many other models of the **Etekcity** scales available. <u>Only</u> models purchased via <u>barkeepapp.com</u> are certified to work with BarkeepApp. Other models will not work with BarkeepApp and are <u>not</u> supported by Barkeep. We are not able to provide assistance with or answer questions about scales purchased elsewhere.

Systems Requirements for the Etekcity Scale

Your iOS Device must have Bluetooth capability.

B Etekcity Digital Scale

The **Etekcity** digital scale does <u>not</u> require the use of any **Linea Pro** scanner or **Infinea Tab** scanner. Both will work with any **iOS** Device with **Bluetooth LE** capacity listed below. The following **iOS** Devices are compatible with one of our **Etekcity** digital scale:

- iPad 3rd generation and later
- iPad Mini
- iPhone 4S or later
- iPod Touch 5th generation and later

Charging the Etekcity Batteries

The **Etekcity Luminary** comes with a built-in 300mAh Li-ion battery. The battery should be fully charged when the scale is shipped. The scale's display will show **LO** to warn of a low battery.

To charge the battery:

- ✓ The **Etekcity Luminary** ships with a charging cable.
- \checkmark It can be plugged into an DC 5V adapter that is plugged into an outlet or you can plug the cable into a powered USB outlet.
- \checkmark The scale does not include a DC 5V adapter.
- \checkmark The battery indicator will flash on the display while charging.
- ✓ **Note:** You cannot weigh bottles while the battery is charging.

⁸ **Note:** The **Escali SmartConnect** digital scale was discontinued by the manufacturer and is no longer available. Users with an existing **Escali SmartConnect** will still be able to use the scale with BarkeepApp. If you have questions regarding your **Escali SmartConnect**, contact <u>support@barkeepapp.com</u>

Setting up an Etekcity Luminary for use with BarkeepApp

The first step is to turn on your scale by pressing $\frac{O}{ZERO}$.

- Note that the scale will turn off automatically after 3 minutes of inactivity.
- To manually turn off the scale, tap and hold $\frac{0}{2ERO}$ for 2 seconds.
- If the scale does not turn on, the battery might need charging.

Make sure your **iPad** has **Bluetooth** turned on and you are using an **iPad** that supports **Bluetooth LE** (Low Energy). The following **iOS** Devices will work with an **Etekcity Luminary** scale:

- iPad 3rd generation and later
- iPad Mini
- iPhone 4S or later and iPod Touch 5th generation and later

ad ₹	Settings	11:13 AM \$ 96% Bluetooth	
≻	Airplane Mode	Bluetooth	
?	Wi-Fi mybarwifi	Now discoverable as "Jane Manager's iPad".	
*	Bluetooth On	Devices 🎲	
٦	Notifications		
8	Control Center		
C	Do Not Disturb		
0	General		
AA	Display & Brightness		
*	Wallpaper		
(1)	Sounds		
â	Passcode		
D	Privacy		
	iCloud tofu@tofuart.com		
\bigcirc	iTunes & App Store		
	Mail, Contacts, Calendars		
	Notes		
	Reminders		
	Messages		

With the **Etekcity Luminary** scale you do <u>not</u> need to take additional the steps to register the scale with Barkeep. You do not to "pair" the scale with any **iOS** Device(s). The **Etekcity Luminary** scale works directly with your **iOS** Device. It does not require the use of an **Infinea Tab** scanner.

Reminder: There are many other models of the **Etekcity** scale available. <u>Only</u> those purchased via <u>barkeepapp.com</u> are certified to work with BarkeepApp. Other models will not work with BarkeepApp and are <u>not</u> supported by Barkeep. We are not able to provide assistance with or answer questions about scales purchased elsewhere.

Do not download the VeSync app!

The manufacturer's website offers an **Etekcity VeSync** app.

You do <u>not</u> need to download and install this app to use your scale with Barkeep. We do <u>not</u> recommend installing the app from **Etekcity**.

Connecting the Etekcity Luminary with BarkeepApp

- I. Select iOS Settings ind verify that your iOS Device's Bluetooth support is turned on.
- **2.** Launch BarkeepApp on your **iOS** Device and go to your inventory.
- **3.** Turn on you **Etekcity Luminary**, when the scale is turned on and is in proximity to your **iOS** Device, your scale should automatically connect to BarkeepApp.
- 4. You are ready to start weighing bottles.

Tips for Using your Etekcity Scale

Below are a few tips and things to remember when using your **Etekcity Luminary** scale:

Capacity

22 lbs. (10 kg.)

Touch Sensitive Controls

- The controls are touch sensitive.
 Light contact with the surface of the controls will activate them.
- Pressing hard on the controls will cause the scale to malfunction.
- You must operate the controls with bare hands.

Automatic Shut-Off

The scale will turn off after 3 minutes of inactivity to save battery.

Warning Messages

- LO Low battery warning *Reminder:* You cannot weigh bottles while the battery is charging.
- Err Overload warning

Tips for Proper Use and Care

- Use and store the scale at room temperature. Avoid exposure to damp environments or extreme temperatures.
- Use on a flat, level and stable surface.
- The scale is an instrument of precision. Do not submit the scale to shaking, excessive vibration or other rough treatment.
- The display may be affected by electromagnetic disturbances such as radios, microwaves or cell phones. If such disturbances occur, remove the source of the disturbance and restart the scale.
- Do not exceed the weight capacity (22 lb/10 kg), as it will damage the scale. An error indicator will appear on the display if the limit is exceeded (**Err**).
- Disassembling or tampering with the scale voids the manufacturer's warranty.
- Clean the scale with gentle, dish soap and a damp cloth.
- Do not submerge in liquid. The scale is water resistant but <u>not</u> waterproof.
- The scale can withstand most liquid spills without permanent damage. However, we still recommend wiping the scale dry with a soft cloth after any spills to keep it in optimal condition.

Etekcity Luminary Manual

For additional information, there is a manual from the manufacturer – <u>click this link</u>.

Adding by Volume

Typically, during an Inventory, users add Items by the bottle, keg or case as well as weighing partial bottles. With Barkeep, users can also add quantities to an Inventory by volume (e.g., liquid ounces).

When would you add Items by Volume?

There might be times when you need to count a beverage that is no longer in its in original bottle or another container. For example, we have some users that create cocktails that they age in barrels and other containers. If you have full containers with your mix of ingredients you could add Items to an Inventory based on those quantities (e.g., 40 oz. of **Nolet's Gin**, 12 oz. of **Negroni**, etc.).

Waste Inventories are another time that it might be appropriate to add Items by Volume. The example below shows a Waste Inventory where you want to account for a spilled pitcher of beer:

4:46 PM	হ ৩ 77% 🔳)	4:46 PM		ଚ ୪ 77% 🔳 ି
Location: Bar 2	_		Waste Inventory May 21, 2019	
Q Sier	O Cancel		1 Items Cost: \$4.67	
	tegory	D. 0. 4 H.		
Sierra Nevada Big Foot Ale Singles 12 oz Bottles	+1	Bar 2: 1 Item Sierra Nevada Keg		32 Fluid Oz
1) Sierra Nevada K 3 15.5 Gallon Keas	*1	15.5 Gallon Kegs		32 Fiuld 02 \$4.67
Sierra Nevada Polo Alo Cingles 12 Oc. attle 12 oz Bottles Location: Bar 2	+1			
Sierra Nevada Sierra Nevada Keg 12 oz Bottles Search Barkeep's Create a new ite Seguina Sierra Nevada Keg Search Barkeep's Create a new ite	41			
Add New Item Manually create				
4 5 6 7 8 9				
Cancel	Done	Ċ Û	Sort Ed	lit + Done

- 1. First select the Item that you want to add to the Inventory.
- 2. On the Inventory Item screen press the "Vol" button.
- 3. Then enter your quantity **G** (e.g., 32 fluid oz. for a spilled pitcher).
- **4.** Press the **button d** to add the Item to your Inventory.
- 5. Your Inventory will display the amount in Fluid Ounces.⁹

Note: Users can set a Volume Format – see <u>General Settings</u>.

⁹ Metric Users can enter volume in liters or milliliters

Adding Cases

To add cases to an Inventory:

- 6. First select the Item that you want to add to the Inventory.
- 7. On the Inventory pop-up Item screen, press the "Cases" button. **Note:** When selecting "Cases" Barkeep shows the price per case.
 In the example below a bottle of Absolut costs \$25.50, there are 12 bottles in a case and the price shown is \$306.00 (\$25.50 x 12). The Item name also includes the bottle size (e.g., Absolut 1I) when displaying cases.
- 8. When "Cases" is selected, the Item size will change to display "Case of N" where N is the number of Bottles/Cans in a Case (12). In the example shown, the name of the Item will change to include the size of the bottles/cans in the case. For example, "Case of 12"

12:43 PM				12:43 PM			🗢 86% 📖
Location:	Store Room	*		Location:	Store Room	×	
Q. Find Item			Cancel	Q Find Item			Cambel
Alp	habetical	By Category		Alph	abetical	By Category	
Absolut 1 Liter Bottles			+1	Absolut 1 Liter Bottles			
Absolut 750 ml Bottles		×	+1	(i) Absolut 750 ml Bottles			+1
(i) Absolut Citron 1 Liter Bottles	Absolut	CHANGE	+1	(i) Absolut Citron 1 Liter Bottles	Absolut 1L	CHANGE	+1
Absolut Grape 1 Liter Bottles	ef \$25.50 per Bottle		+1	Absolut Grape 1 Liter Bottles			+1
Absolut Mand 1 Liter Bottles	la Bottles Wt Cases		+1	Absolut Mand 1 Liter Bottles	a Bottles Wt Cases Vol		+1
Absolut Pear 1 Liter Bottles	Vc 1 Bottles		+1	Absolut Pear V 1 Liter Bottles	/c 1 Cases		+1
Absolut Vanill 1 Liter Bottles		ADD	+1	(i) Absolut Vanilla 1 Liter Bottles	CANCE	ADD	+1
Amaretto Di G 1 Liter Bottles		3	+1	Amaretto Di G 1 Liter Bottles	^a 2	3	+1
(i) Amstel Light 12 oz Bottles	4 5	6	+1	(i) Amstel Light 12 oz Bottles	4 5	6	+1
Anchor Steam 12 oz Bottles	7 8	9	+1	Anchor Steam 12 oz Bottles	7 8	9	+1
Anchor Steam 22 oz Bottles			+1	Anchor Steam 22 oz Bottles			+1
Angostura 19 750 ml Bottles			+1	Angostura 191 750 ml Bottles			+1
Angry Orchary 12 oz Bottles	d Crisp Apple		+1	Angry Orchard 12 oz Bottles	d Crisp Apple		+1
Arrow Cream 1 Liter Bottles	de Cacao		+1	Arrow Cream of 1 Liter Bottles	de Cacao		+1
(i) Arrow Creme 1 Liter Bottles	de Menthe		+1	Arrow Creme of 1 Liter Bottles	de Menthe		+1
B & B Liqueur 1 Liter Bottles			+1	1 Liter Bottles			+1
Bacardi 151 1 Liter Bottles			+1	Bacardi 151 1 Liter Bottles			+1
Cancel			Done	Cancel			Done

The number of bottles/cans in a case will automatically default to the Default Case Size that is specified on the Item Definition. The default case size for **Absolut** I Liter bottles is set to 12, so when you choose Cases of **Absolut** it automatically sets the case size to 12. You can modify this by pressing the **EDIT** button to the right of "Case of 12." This will allow you to edit the field with a new number of bottles per case.

Note: Changing the case size here will only change the number of bottles in a case of **Absolut** for this particular Inventory. If you would like to change the case size permanently so that it applies to all future Inventories, you should change the default case size on the Item screen.

More than one barcode

What if a case has a different UPC barcode than a bottle?

You may assign different barcodes for the same Item. For example, many manufacturers have a barcode for a single bottle as well as different barcodes for a case of 6 bottles and 12 bottles, etc.

See the **<u>Receiving Inventories</u>** section for specific instructions.

Adding Cases and Bottles together

in the same Inventory

If you want to add both cases and bottles of the same Item to an Inventory, you will need to add the Item twice.

For example, if you have 3 cases of **Absolut** and 2 bottles of **Absolut**. You can either add the Item once indicating there are a total of 38 bottles, or you can add three cases and then go back to the Item and add two bottles as a separate entry as shown in the example below.

12:43 PM		May 2	26, 2019 tems \$969.00		
Store Room: 2 It	ems				
Absolut 1 Liter Bottles					2 Bottles \$51.00
Absolut Cases of 12 1 Liter E	Bottles				3 Cases of 12 \$918.00
Û	Û	Sort	Edit	+	Done

Changing Inventory Locations

If you are adding Items to multiple Locations within a single Inventory, you can easily switch between Locations in the middle of an Inventory.

3:40 PM		중 50% ■◯	3:41 PM		🗢 49% 🔳 🔿
Location:	Bar 1	Y	Location:	Bar 1	×
Q. Find Item	Bar 1	Carriere	Q. Find Item		Cancel
Alphab	Bar 2	Category	Alt	phabetical	By Category
100 Pipers Scote	Bar 3	+1	i Becks Dark S	ingles 12 Oz Bottle	+1
Absolut 1 Liter Bottles	Oceanview Ballroom	+1	Beefeater Dry 1 Liter Bottles		
Absolut 750 ml Bottles		+1	Benedictine 1 Liter Bottles		+1
Absolut Citron V 1 Liter Bottles	/odka	+1	Blackstone C 750 ml Bottles	S 1 Liter Bottle: Bar 1 Bar 2	41 ×1
Absolut Mandari 1 Liter Bottles	in Vodka	+1	(i) Blue Angel 1 Liter Bottles	Rar 3	+1
Absolut Pear Voo 1 Liter Bottles	dka	+1	(i) BLUE CURAC 750 ml Bottles	A Bottles	+1
Absolut Vanilla V 1 Liter Bottles	Vodka	+1	(i) Bogle Pinot N 750 ml Bottles	loi Bottles	+1
Amaretto Di Gae 1 Liter Bottles	etano	+1	(i) Bohemian Hig 750 ml Bottles	gh S CANCEL	ADD +1
Amstel Light 12 oz Bottles		+1	Bols Coffee L 1 Liter Bottles	iq I 2	3 +1
(i) Anchor Steam B 12 oz Bottles	leer	+1	Bols Creme d 1 Liter Bottles	le 4 5	6 +1
(i) Anchor Steam S 22 oz Bottles	ingles 22 Oz Bottle	+1	(i) Bols Creme d 1 Liter Bottles		9 +1
Angostura 1919 750 ml Bottles		+1	(i) Bols Sloe Gin 1 Liter Bottles		
Angry Orchard C 12 oz Bottles	Crisp Apple	+1	Bombay Dry 1 Liter Bottles	Gi Gi	
Arrow Cream de 1 Liter Bottles	Cacao	+1	i Bombay Sapp 1 Liter Bottles	phire	+1
(i) Arrow Creme de 1 Liter Bottles	Menthe	+1	(i) Borsodi Bival 500 ml Bottle		+1
(i) B & B Liqueur 1 Liter Bottles		+1	i Bounty Cellar 750 ml Bottles	rs Pinot Noir S	+1
1 Liter Bottles		+1	Brennan's Iris 1 Liter Bottles	sh Whiskey	+1
Cancel	10	Done	Cancel	(m)	Done

To change an Item's Location, you have two options:

Option I

The top of the Inventory's Item List screen has a drop down menu where you can assign or change a Location for the Item you are adding to the Inventory.

Option 2

To change the Location, first select an Item that you want to add to the Inventory. The top of the Item screen has a drop down menu where you can assign or change a Location for the Item you are adding to the Inventory.

Note: On the Add Item screen, the Location will now display your newly selected Location and this Item will be added to the newly selected Location. Also, if you continue adding more Items to the Inventory, the Items will be added to your newly selected Location until you change to a different Location.

Inventory by Location

When is a Full Inventory not a Full Inventory?

When Barkeep uses the name Full Inventory, it implies that you must count everything. Generally, that is true, you do count everything. As a general rule, a Full Inventory is when you count every Item you have on hand — every Item in every Location. Full Inventories are the basis of Barkeep Reports when users choose a Start and End Inventory, they choose from a list of their Full Inventories.

A Limited Full Inventory

You may also do Full Inventories in selected Locations. That inventory would not be a true "Full" Inventory, but more of a Limited Full Inventory. For example, some users do a weekly Full Inventory where they count everything in the building, in all their Locations. They also do a daily "Full" Inventory where they only count in their bar station Locations. With their daily Inventories, they do not count in the walk-in and other storage areas. When they run Reports, for example a Usage Report between a few days, they only select the Locations that were counted.

3:28 PM ♥ 58% ■) 3:26 PM 중 60% ■ < Barkeep Inventories **Usage Report** ABC Beers Choose a Start and End Inventory **Receiving Inventory** May 21, 2019 for your Usage Report 29 Items in 2 Locations Cost: \$5.936.70 8:00 AM Full Inventory Start Inventory Full Inventory on 5/15/19, 11:25 AM Choose 185 Items in 5 Locations May 20, 2019 Value: \$5,571.62 9:50 AM End Inventory Full Inventory on 5/20/19, 9:50 AM Choose Waste Inventory Choose Locations (Bar 1, Bar 2 1 Item in Bar 1 May 19, 2019 Cost: \$5.11 4:33 PM Report Options **Receiving Inventory** Acme Liquor May 17, 2019 19 Items in Store Room Cost: \$1785.53 4:30 PM Group by Location Show Pricing Details Transfer Inventory Use Default Item Price Show Usage by Oz 18 Items in 2 Locations May 16, 2019 Value: sou 2:38 PM Exclude Banquet Usage Show Usage by Liter Acme Liquor **Receiving Inventory** 10 Items in Store Room May 16, 2019 Generate Reports as CSV Show Usage by Serving Cost: \$1,827.51 9:55 AM Email Reports Show Retail Value Full Inventory 188 Items in 5 Locations May 15, 2019 Generate HTML Value: \$3.053.02 11:25 AM **Receiving Inventory** ABC Beers May 14, 2019 19 Items in 2 Locations Cost: \$5,785.84 8:10 AM **Receiving Inventory** Acme Liquor 7 Items in Store Room May 8, 2019 Cost: \$169.60 8:08 AM Acme Liquor **Receiving Inventory** May 6, 2019 6 Items in Store Room Cost: \$24700 9:06 AM **Receiving Inventory** Acme Liquor 11 Items in Store Room Apr 23, 2019 Cost: \$1,589.94 3:39 PM Waste Inventory 1 Item in Bar 2 Apr 23 2019 Run Report Cancel Filter Sort + Done Cancel Save

The example below shows a Usage Report where only the Locations **Bar 1** and **Bar 2** are selected.

Note: If you choose to do Full Inventories and only count certain Locations, Transfer Inventories are crucial. See **Transfer Inventories** section for details. In this example, in order to run accurate Reports based on Limited Full Inventories, Transfer Inventories track when Items are moved to the bar stations (i.e., stock the bar).

Managing your Inventories

The Inventory Screen

The Inventory screen shows you the details for a single Inventory and allows you to add Items to the Inventory, delete Items from the Inventory, modify Items in the Inventory, edit the details of the Inventory itself, or delete the entire Inventory.

The top of the Inventory screen shows a few overview details about the Inventory including:

	3:56 PM	🗢 🖉 86% 🔳
	Full Inventory May 15, 2019 188 Items Value: \$3,081.37	
	Bar 1: 76 Items	
The Inventory Type	Absolution Forties	0.48 Bottles \$12.24
	Absolut Manuarin Vodka	0.93 Bottles \$22.32
• The date that the Inventory was created	Absolat Vanilla Vodka	35.9 Oz (Weight) \$6.52
	Amstel Light 12 oz Bottles	4 Bottles \$3.52
• The total number of Items in the Inventory	Anchor steam Beer 12 grootites	0 Bottles \$0.00
,	Ingry Orchard Crisp Apple	5 Bottles \$5.00
 The total value of the Items in the Inventory 	Arrow Creme de Menthe 1 Liter Bottles	0.1 Bottles \$0.90
	Bacardi 151 1 Liter Bottles	0.4 Bottles \$8.58
	Bacardi Gold 1.5 Liter Bottles	0.91 Bottles \$29.58
	Bailey's Irish Cream	0.53 Bottles \$11.40
	Barton California Brandy 1 Liter Bottles	0.8 Bottles \$6.32
	Barton Gold Rum	1 Bottles \$5.00
	Barton Reserve Whiskey 1 Liter Bottles	1 Bottles \$6.08
	Barton Triple Sec	1 Bottles \$5.00
	Barton Vodka 1 Liter Bottles	1 Bottles \$5.00
	Becks 12 oz Bottles	5 Bottles \$5.24
	Beefeater Dry Gin 1 Liter Bottles	0.58 Bottles \$12.39
	Beefeater Dry Gin 1 Liter Bottles	0.2 Bottles
	Bogle Pinot Noir	\$4.27 1 Bottles
	ि 🕅 Sort Edit	+ Done

By default, the Inventory screen is sorted by Location. The Items¹⁰ within the Inventory are grouped by Location, and Items within a Location are sorted alphabetically. The Location Name and number of Items in that Location are displayed in the header for each section. Each Item within the Location is listed displaying the Item Name, Item Size (11, 12 oz., etc.), and the Quantity of that Item. If an Item is added to the Location more than once, there will be multiple rows displayed showing each time that the Item was added to the Inventory.

¹⁰ The total number of Items indicates the total number of entries for the Inventories.

For example, if **Budweiser** is entered in more than on Location, each entry will count towards the Item count.

Inventory Sort Order

To sort an Inventory:

- 1. You can choose to sort the Items list by pressing Sort (2) at the bottom of the toolbar.
- 2. An action menu appears with five options to sort you're the Items in your Inventory by:
 - Inventory Order First to Last
 - Inventory Order Last to First
 - Item
 - Location, Item
 - Location, First to Last
- 3. You may re-sort the Items so that they are displayed in exactly the same order in which they were added to the Inventory (First to Last). D This is particularly useful if you are reviewing your Inventory for accuracy and want to go back through the Items in the same order that they were added.
- 4. If you choose to sort the list by Inventory Order or Item the individual Items are no longer grouped by Location so the name of the Location that the Item was added to is included in each row.

The example below shows an Inventory sorted by First to Last.

3:34 РМ Full Inventory May 20, 2019 185 Items Value: \$5,571.62		� 57%.∎⊇∙	SI34 PM Full Inver May 20, 2 185 Iter Value: \$5,5	2019 ns
Bar 1: 73 Items			Absolut 1 Liter Bottles	1 Bottles
Absolut 1 Liter Bottles		1 Bottles \$25.50	Bar 1	\$25.50
Absolut Mandarin Vodka		0.8 Bottles \$19.20	Absolut Mandarin Vodka 1 Liter Bottles Bar 1	0.8 Bottles \$19.20
Absolut Vanilla Vodka		0.2 Bottles \$4.80	Absolut Vanilla Vodka	910.20
Amstel Light 12 oz Bottles		12 Bottles \$10.56	1 Liter Bottles Bar 1	0.2 Bottles \$4.80
Anchor Steam Beer 12 oz Bottles		8 Bottles \$8.80	Brennan's Irish Whiskey	0.25 Bottles
Angry Orchard Crisp Apple		12 Bottles \$12.00	Bar 1	\$4.29
Arrow Creme de Menthe 1 Liter Bottles		1 Bottles \$9.00	Canadian Club 6 Yr 1 Liter Bottles	0.5 Bottles
Bacardi 151 1 Liter Bottles		0.16 Bottles \$3.35	Bar 1 Jack Daniels	\$9.48
Bacardi Gold 1.5 Liter Bottles		1 Bottles \$32.50	1 Liter Bottles Bar 1	1 Bottles \$26.75
Bailey's Irish Cream		0.53 Bottles \$11.40	Jameson	
Barton California Brandy 1 Liter Bottles		1 Bottles \$7.90	1 Liter Bottles Bar 1	0.5 Bottles \$11.79
Barton Gold Rum 1 Liter Bottles	Sort By	1 Bottles \$5.00	Seagram's 7 Crown 1 Liter Bottles	0.3 Bottles
Barton Reserve Whiskey 1 Liter Bottles	First to Last	2 Bottles \$12.16	Bar 1	\$4.25
Barton Triple Sec 1 Liter Bottles	Last to First	0.84 Bottles \$4.20	Southern Comfort 1 Liter Bottles Bar 1	0.25 Bottles \$4.60
Barton Vodka		2 Bottles \$10,00	Bacardi 151	\$4.00
Becks 12 oz Bottles	Item	12 Bottles \$12.57	1 Liter Bottles Bar 1	0.16 Bottles \$3.35
Beefeater Dry Gin 1 Liter Bottles	Location, Item	0.58 Bottles \$12.39	Bacardi Gold	1 Bottles
Bogle Pinot Noir 750 ml Bottles	Location, First to Last	1 Bottles \$7.00	Bar 1	\$32.50
Bombay Dry Gin		0.4 Bottles	Captain Morgan Spiced Rum	
Ô 🛈	3 Sort Edit	+ Done	[1] 🗊 Sort	Edit + Done

-

Inventories List

When you select Inventories on the Main Screen (a) the next screen you will see is the Inventories screen. This is where you press the + icon to start (b) a new Inventory but it also is the screen you go to review your existing Inventories if you need to edit Inventory details, make changes by adding and deleting Items in the Inventory and also to delete existing Inventories.

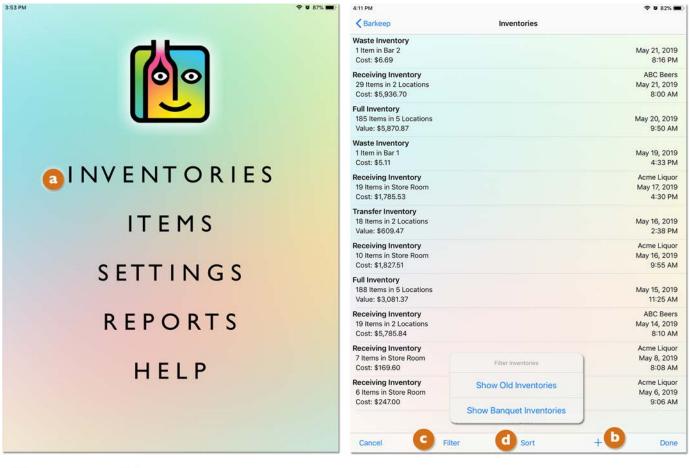
Filter and Sort

When reviewing your Inventories, Barkeep has options to Filter C and Sort C the Inventories on the Screen.

Filtering

When you select to Filter Inventories, C you can choose to:

- Show Old Inventories and see Inventories that remain on your iPad but are more than 30 days old.
- Show Banquet Inventories (if you have created Banquet Inventories). By default, Banquet Inventories will be hidden from your list of Inventories.
- Tap the screen to close the pop-up menu and keep the contents of the list on your Inventories screen as is.





Note: To undo any filtering choices you need to reselect **Filter** and then you will see options **Hide Old Inventories** and **Hide Banquet Inventories** if you have selected to show them.

continue to next page for sorting

Inventories List (cont.) Sorting

When reviewing your Inventories, Barkeep has options to sort the Inventories on the Screen.

By default, Barkeep displays your list in the order Last to First – showing the most recent Inventory at the top of the list. When you select to Sort Inventories, **1** you can choose to:

- Sort First to Last.
- Sort Last to First.
- Tap the screen to close the pop-up menu and keep the contents of the list on your Inventories screen as is.

4:11 PM		🗢 🛛 82% 🔳)	4:11 PM		🗢 0 82% 💻
Keep	Inventories		Barkeep	Inventories	
Waste Inventory 1 Item in Bar 2 Cost: \$6.69		May 21, 2019 8:16 PM	Waste Inventory 1 Item in Bar 2 Cost: \$6.69		May 21, 2019 8:16 PM
Receiving Inventory 29 Items in 2 Locations Cost: \$5,936.70		ABC Beers May 21, 2019 8:00 AM	Receiving Inventory 29 Items in 2 Locations Cost: \$5,936.70		ABC Beers May 21, 2019 8:00 AM
Full Inventory 185 Items in 5 Locations Value: \$5,870.87		May 20, 2019 9:50 AM	Full Inventory 185 Items in 5 Locations Value: \$5,870.87		May 20, 2019 9:50 AM
Waste Inventory 1 Item in Bar 1 Cost: \$5.11		May 19, 2019 4:33 PM	Waste Inventory 1 Item in Bar 1 Cost: \$5.11		May 19, 2019 4:33 PM
Receiving Inventory 19 Items in Store Room Cost: \$1,785.53		Acme Liquor May 17, 2019 4:30 PM	Receiving Inventory 19 Items in Store Room Cost: \$1,785.53		Acme Liquor May 17, 2019 4:30 PM
Transfer Inventory 18 Items in 2 Locations Value: \$609.47		May 16, 2019 2:38 PM	Transfer Inventory 18 Items in 2 Locations Value: \$609.47		May 16, 2019 2:38 PM
Receiving Inventory 10 Items in Store Room Cost: \$1,827.51		Acme Liquor May 16, 2019 9:55 AM	Receiving Inventory 10 Items in Store Room Cost: \$1,827.51		Acme Liquor May 16, 2019 9:55 AM
Full Inventory 188 Items in 5 Locations Value: \$3,081.37		May 15, 2019 11:25 AM	Full Inventory 188 Items in 5 Locations Value: \$3,081.37		May 15, 2019 11:25 AM
Receiving Inventory 19 Items in 2 Locations Cost: \$5,785.84		ABC Beers May 14, 2019 8:10 AM	Receiving Inventory 19 Items in 2 Locations Cost: \$5,785.84		ABC Beers May 14, 2019 8:10 AM
Receiving Inventory 7 Items in Store Room Cost: \$169.60		Acme Liquor May 8, 2019 8:08 AM	Receiving Inventory 7 Items in Store Room Cost: \$169.60	Sort Inventories	Acme Liquor May 8, 2019 8:08 AM
Receiving Inventory 6 Items in Store Room Cost: \$247.00		Acme Liquor May 6, 2019 9:06 AM	Receiving Inventory 6 Items in Store Room Cost: \$247.00	First to Last	Acme Liquor May 6, 2019 9:06 AM
				Last to First	
Cancel Filter	1 Sort	+ Done	Cancel Filter	Sort	+ Done

To undo any sorting choices, you need to reselect Sort and then re-sort your list.

Can you merge Inventories?

If you have created more than one Inventory and you would prefer a single Inventory, you are able to merge the Inventories you with a BarkeepOnline account. See the **BarkeepOnline User Guide** for more details.

Editing an Inventory

To edit properties of an Inventory, such as the Inventory Type or Inventory Date/Time for a particular Inventory, do the following steps:

- I. Go to the Inventory screen for the Inventory <a>[a] that you'd like to modify.
- **2.** Press Edit on the **b** bottom toolbar.
- **3.** After making your changes **C** in the pop-up Inventory Type screen, **d** press to **Save** your changes or select **Cancel** to discard them.

4:11 PM			♥ 82% ■)	4:36 PM			🗢 🖉 80% 🔳
K Barkeep	Inventories				Receiving Invento May 17, 2019	ry	
Waste Inventory 1 Item in Bar 2		N	May 21, 2019		19 Items Cost: \$1,785.53		
Cost: \$6.69			8:16 PM	Store Room: 19 Items	Inventory Type	(
Receiving Inventory 29 Items in 2 Locations Cost: \$5,936.70		N	ABC Beers May 21, 2019 8:00 AM	Barton California Brandy Cases of 12 1 Liter Bottles	Full Receive Waste Transfer E	mpties Return	1 Case of 12 \$94.80
Full Inventory				Barton Gin Cases of 12 1 Liter Bottles	Date 5/17/19, 4:30 PM	Edit	4 Cases of 12 \$264.00
185 Items in 5 Locations Value: \$5,870.87		Ν	May 20, 2019 9:50 AM	Barton Gold Rum Cases of 12 1 Liter Bottles	Invoice No 1200000356	2	1 Case of 12 \$60.00
Waste Inventory 1 Item in Bar 1			May 19, 2019	Barton Light Rum Cases of 12 1 Liter Bottles	Invoice Amt \$1,785.00	- 2	1 Case of 12 \$66.00
Cost: \$5.11			4:33 PM	Barton Reserve Whiskey Cases of 12 1 Liter Bottles	Supplier Acme Liquor	Edit 🧖	4 Cases of 12 \$291.84
Receiving Inventory 19 Items in Store Room			Acme Liquor May 17, 2019	Barton Triple Sec Cases of 12 1 Liter Bottles	Description		2 Cases of 12 \$120.00
Cost: \$1,785.53		•	4:30 PM	Barton Vodka Cases of 12 1 Liter Bottles	Notes	Edit	6 Cases of 12 \$360.00
Transfer Inventory 18 Items in 2 Locations		N	May 16, 2019	DeKuyper Anisette 1 Liter Bottles			1 Bottles \$9.08
Value: \$609.47 Receiving Inventory			2:38 PM Acme Liquor	DeKuyper Blue Curacao			2 Bottles \$18.66
10 Items in Store Room Cost: \$1,827.51			May 16, 2019 9:55 AM	DeKuyper Blue Curacao 1 Liter Bottles		•	1 Bottles \$9.85
Full Inventory				DeKuyper Buttershots 1 Liter Bottles	Cancel	G Save	1 Bottles \$8.33
188 Items in 5 Locations Value: \$3,081.37		h	May 15, 2019 11:25 AM	DeKuyper Cactus Juice Cases of 12 1 Liter Bottles			1 Case of 12 \$116.04
Receiving Inventory 19 Items in 2 Locations		Ν	ABC Beers May 14, 2019	DeKuyper Creme de Cas 1 Liter Bottles	sis		1 Bottles \$10.07
Cost: \$5,785.84			8:10 AM	DeKuyper Sour Apple Pu 1 Liter Bottles	cker		1 Bottles \$9.62
Receiving Inventory 7 Items in Store Room			Acme Liquor May 8, 2019	DeKuyper Wilderberry 1 Liter Bottles			1 Bottles \$9.40
Cost: \$169.60			8:08 AM	DeKuyper Wilderberry			1 Bottles
Receiving Inventory 6 Items in Store Room			Acme Liquor May 6, 2019	1 Liter Bottles Juarez Tequila Cases of 12 1 Liter Bottles			\$9.40 2 Cases of 12 \$120.00
Cost: \$247.00			9:06 AM	Smirnoff Vodka Cases of 12 1 Liter Bottles			1 Case of 12 \$138.96
				Smirnoff Vodka	-		6 Bottles
Cancel Fil	ter Sort	+	Done	rîn 🕅	Sort D E	dit	+ Done

Inventory Properties

Property	Applies To	Description
Date	All - Required	The time that the Inventory was created.
Description	All (optional)	A brief description of the Inventory. For example: "Premium Inventory"
Notes	All (optional)	Notes about the Inventory. For example: "Received a broken bottle of Absolut . Expect a credit from Southern."
Invoice No.	Receiving (optional)	The invoice number for a receiving invoice.
	Return (optional)	
Invoice	Receiving (optional)	The total cost of the invoice associated with a Receiving
Amount	Return (optional)	Inventory. This can be used to compare the cost on the invoice to the actual value of the Inventory by running a Summary Report on the Inventory.
Supplier	Receiving (optional)	The Supplier, vendor or company that provides you with
	Return (optional)	ltems.
From Location	Transfer - Required	The Location that Items are being transferred out of.

The properties that you can set on an Inventory are:

Locked Inventories

BarkeepOnline includes a feature where you can lock any of your Inventories by clicking on the 🔒 lock icon next to the Inventory.

- The icon indicates whether the Inventory is locked.
- All Inventories are unlocked by default.
- If an Inventory is locked, you cannot edit the Inventory. You must first unlock the Inventory to make changes.
- You can lock or unlock an Inventory only when you are logged in to BarkeepOnline.
- All users can still view a locked Inventory, but it cannot be changed.
- You can use a locked Full Inventory to create a <u>new</u> Repeat Inventory (the new Inventory will be unlocked by default).



For additional information see the **BarkeepOnline User Guide**.

Editing Inventory Items

To edit details of an Inventory Item, do the following:

- **I.** Select the Item **(a)** you would like to modify from the Inventory screen (e.g., **Anchor Steam**).
- 2. This will take you to the Inventory Item screen.
- 3. In the Inventory Item screen, you can:
 - select a different Item
 - change the Quantity
 - change the Units (Bottles, Wt, Cases, Vol)
 - change the Location of the Item
- **4.** After making your changes, **b** you can press **save** to save your changes or select **cancel** to discard them.

12:21 PM	중 96% ■	12:22 PM 🗢 96% 🖬
Receiving Inventory May 21, 2019 28 Items Cost: \$5,720.70		Receiving Inventory May 21, 2019 28 Items Cost: \$5,720.70
Store Room: 2 Items		Store Room: 2 Items
Red Bull Cases of 24 250 ml Cans	8 Cases of 24 \$318.72	Red Bull 8 Cases of 24 Cases of 24 250 ml Cans \$318.72
Red Bull Sugar Free Cases of 24 250 ml Cans	6 Cases of 24 \$239.04	Red Bull Sugar Free 6 Cases of 24 Cases of 24 250 ml Cans \$239.04
Walk-in Cooler: 26 Items		Walk-in Cooler: 26 Items
Amstel Light Cases of 24 12 oz Bottles	4 Cases of 24 \$84.48	Amstel Light 4 Cases of 24 Cases of 24 12 oz Bottles \$84.48
Anchor Steam Beer Cases of 24 12 oz Bottles	6 Cases of 24 \$158.40	Anchor Steam Beer 6 Cases of 24 Cases of 24 12 oz Bottles \$158.40
Angry Orchard Crisp Apple Cases of 24 12 oz Bottles	6 Cases of 24 \$144.00	Angry Orchard Crisp A Location: Walk-in Cooler V 6 Cases of 24 12 oz Bottles \$144.00
Becks Cases of 24 12 oz Bottles	6 Cases of 24 \$150.90	Becks Anchor Steam Beer 12oz 6 Cases of 24 Cases of 24 12 oz Bottles Case of 24 5150.90
Bud Light Cases of 24 12 oz Bottles	12 Cases of 24 \$216.00	Bud Light Cases of 24 12 oz Bottles \$26.40 per Case Failth 12 Cases of 24 \$216.00
Budweiser Cases of 24 12 oz Bottles	12 Cases of 24 \$216.00	Budweiser Cases of 24 12 oz Bottles Wt Cases Vol \$216.00 \$216.00
Budweiser Keg 15.5 Gallon Kegs	2 Kegs \$184.00	Budweiser Keg 6 Cases 2 Kegs \$184.00
Corona Extra Cases of 24 12 oz Bottles	8 Cases of 24 \$211.20	Corona Extra Cases of 24 12 oz Bottles DELETE CANCEL SAVE 8 Cases of 24 2 oz Bottles
Crystal Geyser Alpine Spring Water Cases of 24 12 oz Bottles	8 Cases of 24 \$192.00	Crystal Geyser Alpine : 8 Cases of 24 Cases of 24 12 oz Bottles 9 192.00 192 192 192 192 192 192 192 192 192 192
Crystal Geyser Sparkling Mineral Water Cases of 24 12 oz Bottles	8 Cases of 24 \$192.00	Crystal Geyser Sparkli 22 3 8 Cases of 24 Cases of 24 12 oz Bottles
Crystal Geyser Wild Berry Cases of 24 12 oz Bottles	4 Cases of 24 \$96.00	Crystal Geyser Wild Be 4 5 6 4 Cases of 24 Cases of 24 Cases of 24 12 oz Bottles \$96.00
Fat Tire Keg 15.5 Gallon Kegs	1 Kegs \$155.00	Fat Tire Keg 7 8 9 1 Kegs 15.5 Gallon Kegs 7 8 9 \$155.00
Guinness Keg 13.2 Gallon Kegs	3 Kegs \$438.00	Guinness Keg 3 Kegs 3 Kegs \$438.00
Heineken Cases of 24 12 oz Bottles	6 Cases of 24 \$177.00	Heineken Cases of 24 12 oz Bottles 6 Cases of 24
Lagunitas Keg 15.5 Gallon Kegs	2 Kegs \$270.00	Lagunitas Keg 2 Kegs 15.5 Gallon Kegs \$270.00
Miller Lite Keg	2 Kegs	Miller Lite Keg 2 Kegs 15.5 Golion Kare 172.00
[[↑]] ∭ Sort Edit	+ Done	ر اُل اُل Sort Edit + Done

Deleting Inventory Items

To delete an existing Item in an Inventory you have two choices. You can delete an Item from an Inventory by either:

- Swiping your finger horizontally across an Item a in the Inventory screen and then pressing the Delete button.
- 2. Or press the button button con the keyboard for the Inventory Item screen.

After you press **Delete**, an action menu will appear. Press **Delete** to confirm you would like to delete the Item **C** or press **Cancel** to keep it.

12:22 PM	♥ 95%	12:22 PM	🗢 95% 🖬
Receiving Inventor May 21, 2019 28 Items	у	Receiving Inventory May 21, 2019 28 Items	
Cost: \$5,720.70		Location: Walk-in Cooler 🗸	
Store Room: 2 Items		Store Room: 2 Items Corona Extra 12oz	
Red Bull	8 Cases of 24	Red Bull Case of 24 EDIT Cases of 24 250 ml Cans \$26.40 per Case per Case	8 Cases of 24
Cases of 24 250 ml Cans	\$318.72		\$318.72
Red Bull Sugar Free	6 Cases of 24	Red Bull Sugar Free Bottles Wt Cases Vol	6 Cases of 24
Cases of 24 250 ml Cans	\$239.04		\$239.04
Walk-in Cooler: 26 Items		Walk-in Cooler: 26 Ite	
Amstel Light	4 Cases of 24	Amstel Light	4 Cases of 24
Cases of 24 12 oz Bottles	\$84.48	Cases of 24 12 oz Bottles	\$84.48
Anchor Steam Beer	6 Cases of 24	Anchor Steam Beer	6 Cases of 24
Cases of 24 12 oz Bottles	\$158.40	Cases of 24 12 oz Bottles	\$158.40
Angry Orchard Crisp Apple	6 Cases of 24	Angry Orchard Crisp A Cases of 24 12 oz Bottles 2 3	6 Cases of 24
Cases of 24 12 oz Bottles	\$144.00		\$144.00
Becks	6 Cases of 24	Becks	6 Cases of 24
Cases of 24 12 oz Bottles	\$150.90	Cases of 24 12 oz Bottles	\$150.90
Bud Light	12 Cases of 24	Bud Light	12 Cases of 24
Cases of 24 12 oz Bottles	\$216.00	Cases of 24 12 oz Bottles Are you sure you want to delete this	\$216.00
Budweiser	12 Cases of 24	Budweiser	12 Cases of 24
Cases of 24 12 oz Bottles	\$216.00	Cases of 24 12 oz Bottles	\$216.00
Budweiser Keg	2 Kegs	Budweiser Keg Cancel Delete	2 Kegs
15.5 Gallon Kegs	\$184.00		\$184.00
At 12 oz Bottles	a 8 Cases of 24 Delete	Corona Extra Cases of 24 12 oz Bottles	8 Cases of 24 \$211.20
Crystal Geyser Alpine Spring Water	8 Cases of 24	Crystal Geyser Alpine Spring Water	8 Cases of 24
Cases of 24 12 oz Bottles	\$192.00	Cases of 24 12 oz Bottles	\$192.00
Crystal Geyser Sparkling Mineral Water	8 Cases of 24	Crystal Geyser Sparkling Mineral Water	8 Cases of 24
Cases of 24 12 oz Bottles	\$192.00	Cases of 24 12 oz Bottles	\$192.00
Crystal Geyser Wild Berry	4 Cases of 24	Crystal Geyser Wild Berry	4 Cases of 24
Cases of 24 12 oz Bottles	\$96.00	Cases of 24 12 oz Bottles	\$96.00
Fat Tire Keg	1 Kegs	Fat Tire Keg	1 Kegs
15.5 Gallon Kegs	\$155.00	15.5 Gallon Kegs	\$155.00
Guinness Keg	3 Kegs	Guinness Keg	3 Kegs
13.2 Gallon Kegs	\$438.00	13.2 Gallon Kegs	\$438.00
Heineken	6 Cases of 24	Heineken	6 Cases of 24
Cases of 24 12 oz Bottles	\$177.00	Cases of 24 12 oz Bottles	\$177.00
Lagunitas Keg	2 Kegs	Lagunitas Keg	2 Kegs
15.5 Gallon Kegs	\$270.00	15.5 Gallon Kegs	\$270.00
Miller Lite Keg	2 Kegs	SE E Gallan Kan	2 Kegs
🗍 🗐 Sort Edi	t + Done	Sort Edit	+ Done

Double-Check Your Inventory

Once you've completed an Inventory, it's a good habit to double-check the Inventory. It is very easy to miscount Items or miss a product or two while doing your Inventory.

- I. The easiest way to do that is to select the Inventory you'd like to double-check in BarkeepApp.
- 2. On the Inventory screen, press Sort at the <a>2 bottom of the toolbar.
- 3. An action menu appears with four options to sort your Inventory. (D) Select First to Last.
- **4.** This will display all of the Items in the Inventory **G** in the same order that you added them.
- 5. Working from this list, go back through your Inventory and check each Item against the quantity that you entered in the Inventory. If you find any mistakes or missing Items, you can immediately modify or add them from the Inventory screen.

3:34 PM	Full Inventory May 20, 2019 185 Items	중 57% ■〕	3:34 PM Full Invent May 20, 20 185 Items	19 1
	Value: \$5,571.62		Value: \$5,57	1.62
Bar 1: 73 Items			1 Liter Bottles	1 Bottles
Absolut		1 Bottles	Bar 1	\$25.50
1 Liter Bottles		\$25.50	Absolut Mandarin Vodka	
Absolut Mandarin Vodka 1 Liter Bottles		0.8 Bottles \$19.20	1 Liter Bottles Bar 1	0.8 Bottles \$19.20
Absolut Vanilla Vodka		0.2 Bottles	Absolut Vanilla Vodka	\$19.20
1 Liter Bottles		\$4.80	1 Liter Bottles	0.2 Bottles
Amstel Light 12 oz Bottles		12 Bottles \$10.56	Bar 1	\$4.80
Anchor Steam Beer 12 oz Bottles		8 Bottles \$8.80	Brennan's Irish Whiskey	0.25 Bottles
Angry Orchard Crisp Apple		12 Bottles \$12.00	Bar 1	\$4.29
Arrow Creme de Menthe 1 Liter Bottles		1 Bottles \$9.00	Canadian Club 6 Yr 1 Liter Bottles	0.5 Bottles
Bacardi 151 1 Liter Bottles		0.16 Bottles \$3.35	Bar 1 Jack Daniels	\$9.48
Bacardi Gold 1.5 Liter Bottles		1 Bottles \$32.50	1 Liter Bottles Bar 1	1 Bottles \$26.75
Bailey's Irish Cream		0.53 Bottles \$11.40	Jameson	
Barton California Brandy		1 Bottles \$7.90	1 Liter Bottles Bar 1	0.5 Bottles \$11.79
Barton Gold Rum 1 Liter Bottles	Sort By	1 Bottles \$5.00	Seagram's 7 Crown	0.3 Bottles
Barton Reserve Whiskey	First to Last 🕒	2 Bottles \$12.16	Bar 1	\$4.25
Barton Triple Sec	Last to First	0.84 Bottles \$4.20	Southern Comfort 1 Liter Bottles	0.25 Bottles
Barton Vodka		2 Bottles	Bar 1 Bacardi 151	\$4.60
1 Liter Bottles Becks 12 oz Bottles	Item	\$10.00 12 Bottles	1 Liter Bottles	0.16 Bottles
12 oz Bottles Beefeater Dry Gin 1 Liter Bottles	Location, Item	\$12.57 0.58 Bottles \$12.39	Bar 1 Bacardi Gold	\$3.35
Bogle Pinot Noir 750 ml Bottles	Location, First to Last	1 Bottles \$7.00	1.5 Liter Bottles Bar 1	1 Bottles \$32.50
Bombay Dry Gin		0.4 Bottles	Captain Morgan Spiced Rum	
r III	a Sort Edit	+ Done	Î] ÎÎ Sort	Edit + Done

Note: Alternatively, if you prefer to work from paper, you can print the Inventory Detail Report, which will display each Item that you added to the Inventory in the same order that you added them. From this report, you can double-check each Item that you added to the Inventory to confirm that the quantity, Location, and units are all correct.

BarkeepOnline users can take advantage of additional methods to sort their inventories and check them with their laptop or desktop computer.

Double-Check Your Inventory (cont.)

Reviewing your Inventories by Item

When you need to review the inventory entries for any Item, simply click on the Item's details icon <a>[] to the right. You will see a list of all the inventories where this Item appears. <a>[] Reviewing this list can help you spot any potential inventory errors.

10:30 AM	🗢 😆 77% 📖)	10:34 AM	ବ 🛿 76% 🔳
K Barkeep Ite	ems	Inventory Entries for Barton Gin 1L	
Q	Cancel	Inventory Entries for Barton Gin 1L	
Alphabetical	By Category	Receiving Inventory	
Barton California Brandy 1 Liter Bottles	9	Mar 7, 2024 08:20 AM Store Room	2 Cases of 12 \$132.00
Barton Gin 1 Liter Bottles	a	Full Inventory Mar 4, 2024 03:59 PM Store Room	2 Cases of 12 \$132.00
Barton Gold Rum 1 Liter Bottles	9	Receiving Inventory Feb 22, 2024 04:06 PM	2 Bottles
Barton Light Rum 1 Liter Bottles	9	Store Room Full Inventory Dec 26, 2023 03:01 PM	\$11.00 2 Cases of 12
Barton Reserve Whiskey 1 Liter Bottles		Store Room Banquet End Inventory	\$132.00
Barton Triple Sec 1 Liter Bottles	6	Nov 26, 223 10:40 PM Store Room	0.25 Bottles \$1.38
Barton Vodka 1 Liter Bottles	٢	Banquet Waste Inventory Nov 26, 2023 08:40 PM Store Room	0.65 Bottles \$3.58
Becks 12 oz Bottles	9	Banquet Start Inventory Nov 26, 2023 05:45 PM	2 Bottles
Becks Dark Singles 12 Oz Bottle 12 oz Bottles	•	Store Room	\$11.00
Beefeater Dry Gin 1 Liter Bottles	۲		
Benedictine 1 Liter Bottles	۲		
Blackstone Cabernet Sauvginon 750 ml Bottles	۲		
Blue Angel 1 Liter Bottles	۲		
BLUE CURACAO - BOLS 750 ml Bottles	(9)		
Cancel Batch Items	Filter 💽 + Done	Sort	Done

Note: Before your delete any Item, this is a good way to check if you should make an Item inactive instead of deleting it. If an Item is used in inventories, we recommend making it inactive instead of deleting it. See the section **Deactivating and Deleting Items** for more details.

Saving Time with Repeat Inventories

Barkeep includes a Repeat Inventory feature. Repeat Inventories are a way to save time when you perform the same Inventory on a regular basis. With a Repeat Inventory, you can use a previous Inventory like a template – you will not need to look-up and/or scan each Item, instead you will just need to update all the quantities. When you do a Repeat Inventory, Barkeep prompts you to add the items from the original inventory in the same order that they were entered in the original inventory.

A Repeat Inventory Example — How we use Repeat Inventories in our own club.

We perform a Premium Liquor Inventory every day. This involves counting all the Premium Liquor Inventory in five different Locations and weighing all partial bottles. The size of our daily Premium Inventory is 110 Items in five Locations.

Our Premium Liquor Inventory is exactly the same process every day. We know how many Items should be in each Location. We rarely add new Premium Liquor Items, so the Items are the same every day — only the quantities vary.

When taking inventory, we had to be careful to remember to switch back and forth between Bottles and Weight, otherwise we would end up with entries like 63.2 Bottles or .7 oz. It's an easy mistake to make. Using a Repeat Inventory automatically selects the correct Quantity Type based on the entry in the previous Inventory, helping to speed up the process and minimize mistakes.

1:18 PM			우 🖉 100% 🔳
Bar 1: 94 Items	Full Inventory Mar 2, 2024 170 Items Value: \$6,713.32	2	
Absolut			1 Bottles
1 Liter Bottles Absolut 1 Liter Bottles			\$21.20 0.8 Bottles \$16.96
Absolut Citron Vodka			1 Bottles \$25.75
Absolut Citron Vodka 1 Liter Bottles			2 Bottles \$51.50
Absolut Citron Vodka 1 Liter Bottles			1 Bottles \$25.75
Absolut Vanilla Vodka 1 Liter Bottles			0.3 Bottles \$7.20
Absolut Vanilla Vodka 1 Liter Bottles			1 Bottles \$24.00
Absolut Vanilla Vodka 1 Liter Bottles			1 Bottles \$24.00
Amstel Light 12 oz Bottles			8 Bottles \$10.96
Amstel Light 12 oz Bottles			4 Bottles \$5.48
Anchor Steam Beer	Summary Repo	rt	12 Bottles \$13.20
Angry Orchard 12 oz Bottles	Summary Report by L	ocation	4 Bottles \$5.49
Angry Orchard Crisp Apple 12 oz Bottles	Datel Decent		8 Bottles \$8.00
Bacardi 151 1 Liter Bottles	Detail Report		0.8 Bottles \$17.16
Bacardi 151 1 Liter Bottles	Usage Report		0.5 Bottles \$10.73
Bacardi Ciclon 1 Liter Bottles	Repeat Inventor	ry	1 Bottles \$10.00
Bacardi Gold 1.5 Liter Bottles	Repeat Inventory by L	ocation	1 Bottles \$32.50
Bacardi Lemon	hepear inventory by L		1.2 Bottles \$20.40
Ċ Ū	Sort E	dit -	- Done

Repeat Inventory vs. Repeat Inventory by Location

When you select Repeat Inventory by Location, Barkeep allows you to select each Location from the original inventory in any order that you choose.

Barkeep prompts you to add all the items for that Location in the order that they were entered for that Location in the original Inventory.

A regular Repeat Inventory can only be performed by one person at a time. A Repeat Inventory by Location can be performed by multiple people at the same time on different devices with each person repeating a different Location.

continue to next page for instructions

Repeat Inventories (cont.)

To start a Repeat Inventory, do the following steps:

- I. Select the existing Inventory you would like to use for a Repeat Inventory.
- 2. Press the action \square icon on \blacksquare the toolbar at the bottom of the Inventory screen.
- **3.** Choose **b** Repeat Inventory.
- 4. This will take you to the first Inventory Item screen. C Barkeep has created a new Repeat Inventory with the same Inventory Type as the original Inventory that you are repeating.
- 5. The Inventory Item screen appears with the Location, Item, and Quantity Type (Bottles / Wt / Cases) automatically filled in for you with the details for the first Item in the original Inventory.
- 6. The quantity from the original Inventory is highlighted. You will then be asked to enter a quantity for each Item d that exists in the original Inventory.
- 7. If the quantity is the same, press the button. Or change and enter the quantity for the Item, press the button. C This will add the Item to the Repeat Inventory.
- 8. Automatically the next Item from the original Inventory will appear. Continue to enter quantities for each Item individually until you have entered quantities for each Item in the original Inventory.

1:18 PM			🗢 🛛 100% 🔲	1:19 PM				🗢 ŭ 100% 🔲
		nventory 2, 2024			Location:	Bar 1🗘		
Parts Od Isano) Items \$6,713.32		Dest 1 hor	Absolut 1 Liter Bottles		CHANGE	
Bar 1: 94 Items				Bar 1: 1 Item	\$21.20 per Bo	ttle		
Absolut 1 Liter Bottles			1 Bottles \$21.20	Absolut 1 Liter Bottles	Bottles Wt	Cases Vol		1 Bottles \$21.20
Absolut 1 Liter Bottles			0.8 Bottles \$16.96		D 1	Bottles		
Absolut Citron Vodka 1 Liter Bottles			1 Bottles \$25.75		DONE			
Absolut Citron Vodka 1 Liter Bottles			2 Bottles \$51.50				e	
Absolut Citron Vodka 1 Liter Bottles			1 Bottles \$25.75			2 3		
Absolut Vanilla Vodka 1 Liter Bottles			0.3 Bottles \$7.20		4	5 6		
Absolut Vanilla Vodka 1 Liter Bottles			1 Bottles \$24.00		7	8 9		
Absolut Vanilla Vodka 1 Liter Bottles			1 Bottles \$24.00			0		
Amstel Light 12 oz Bottles			8 Bottles \$10.96					
Amstel Light			4 Bottles					
Anchor Steam Beer	Summa	ary Report	12 Bottles \$13.20					
Angry Orchard 12 oz Bottles	Summary Re	port by Location	4 Bottles \$5.49					
Angry Orchard Crisp Apple			8 Bottles \$8.00					
Bacardi 151	Detai	il Report	0.8 Bottles \$17.16					
Bacardi 151 1 Liter Bottles	Usag	e Report	0.5 Bottles \$10.73					
Bacardi Ciclon 1 Liter Bottles	(b) Repeat	Inventory	1 Bottles \$10.00					
Bacardi Gold	Depent Inuer	tanu hu Lagatian 刘	1 Bottles \$32.50					
Bacardi Lemon	Repeat inven	tory by Location	1.2 Bottles \$20.40					
🖞 a 🖞	Sort	Edit	+ Done	đ	Sort Sort	Edit	+	Done
	Castro	Clubhouse			(Castro Clubhouse		

Note: In a Repeat Inventory you do not need to choose an Item, scan any bottles, select a Location, or choose a quantity type. Each of these was automatically filled in for you based on the Item details in the original Inventory.

continue to next page

* Instructions for the Repeat Inventory by Location feature follow.

Repeat Inventories (cont.)

Pre-filled Quantities in Repeat Inventories

With a Repeat Inventory, quantities from the original Inventory are now included. Users can always update any quantity, but when doing frequent (i.e., daily) Inventories where many quantities have not changed, this can save time. It also could be useful for Receiving Inventories for regular deliveries with little variation from week-to-week.

Here is how Repeat Inventories now work:

- I. When each Inventory Item screen appears, as always, it shows the same Location, Item, and Quantity Type (Bottles / Wt / Cases) automatically filled in from the original Inventory.
- 2. The quantity from the original Inventory is included and highlighted.
- 3. If the quantity is unchanged, simply press the **EADE** button.
- 4. Or change and enter a new quantity for the Item, and then press the button.
- 5. If you inadvertently add the wrong quantity for an Item, press the button to interrupt the Repeat Inventory.
- Next, select the Item is from the list and make changes to the quantity or other details as needed.
 Note: Continue ahead for an explanation about interrupting and restarting Repeat Inventories.



Repeat Inventories – Skipping Items

When repeating an Inventory, you sometimes come across Items that you want to skip.

For example, if there are no bottles of **Angry Orchard** in your **Bar 1** Location because you ran out, and the Inventory Details screen is displaying:

- Location: Bar 1
- Item: Angry Orchard 8 Bottles
- Quantity Type: Bottles

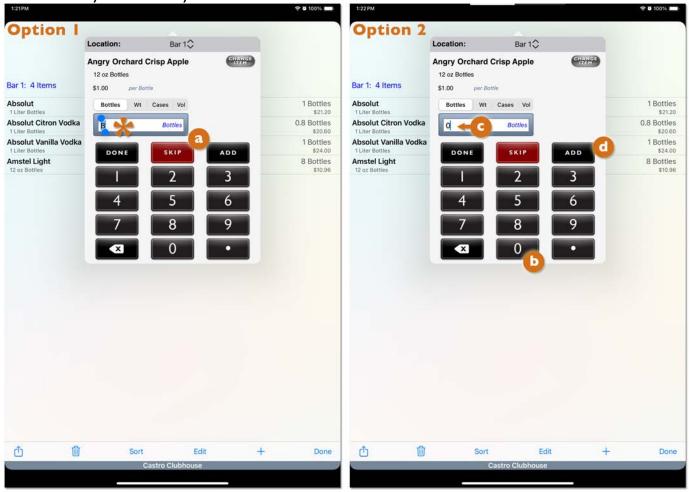
You need a way to skip this Item and move on to the next one. There are two ways to do skip an Item:

Option I

- 1. First, you can skip the Angry Orchard Item¹¹ by pressing **SKIP** button.
- 2. This will move on to the next Item in the original Inventory without entering Angry Orchard for the Location Bar 1 in your Repeat Inventory.
- **3.** The Repeat Inventory will NOT contain an entry for any Items that were skipped. So, the Repeat Inventory will have fewer entries than the original Inventory.

Option 2

- On the other hand, if you want to make sure that you always have the same number of Items in your Inventory (so that you are sure you didn't accidentally miss anything), you can also simply enter b the guantity 0 and c the button.
- 2. This will add the Angry Orchard at Bar 1 to the Repeat Inventory, but the quantity is zero, so it does not affect your Inventory totals.



 $^{_{\rm II}}$ * The Item always shows the quantity from the original Inventory.

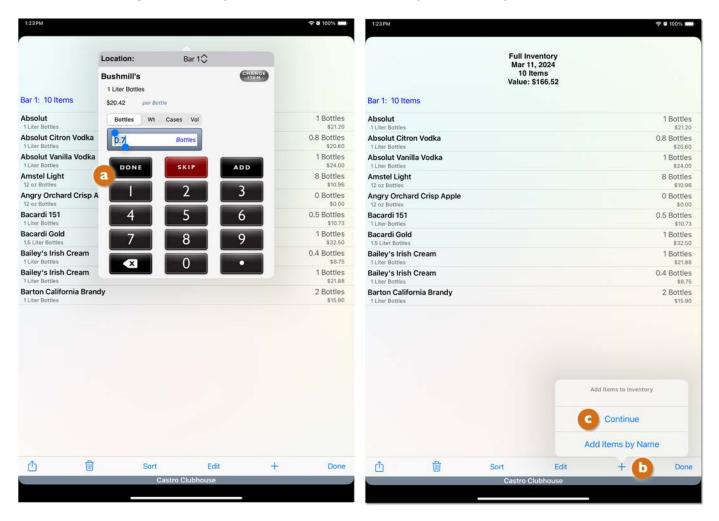
Repeat Inventories (cont.) Interrupting a Repeat Inventory ...and then Continuing

To interrupt a Repeat Inventory, do the following:

- 1. You can interrupt a Repeat Inventory by pressing 🙆 the 🔤 button.
- 2. This will dismiss the Inventory Item screen without adding the currently displayed Item to the Repeat Inventory.
- 3. Even after you interrupt a Repeat Inventory, you can still come back, press the + icon and Continue Continue
- 4. This will automatically take you to the Inventory Item screen where you can enter the quantity for the next Item in the original Inventory. The Item displayed will be the first Item in the original Inventory that was not already added to or skipped in the Repeat Inventory.

Note: You continue from the Repeat Inventory, <u>not</u> the original Inventory.

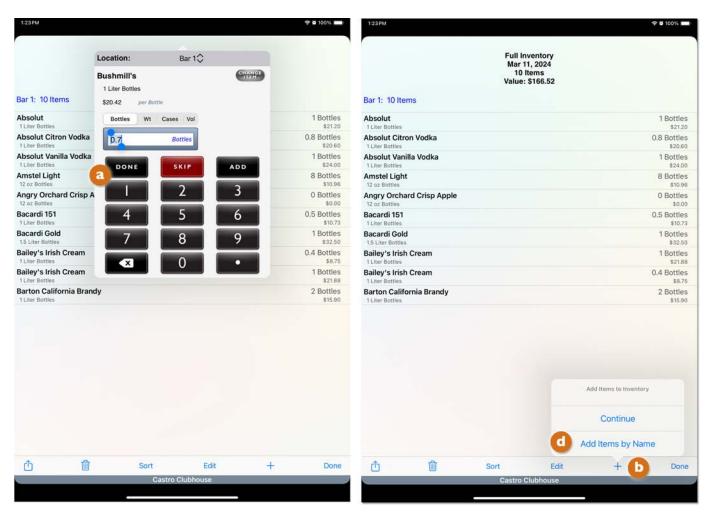
If there are no more Items in the original Inventory that have not already been Added or Skipped, then the Continue option will not be displayed. The Continue option is only available if there are additional Items in the original Inventory that can be added to the Repeat Inventory.



Adding a New Item to a Repeat Inventory

To insert a new Item in the middle of a Repeat Inventory, do the following:

- 1. You simply interrupt the Repeat Inventory by pressing the **DONE** button **(a)** (see previous page).
- 2. This will take you to the Inventory screen for the Repeat Inventory.
- 3. From the Inventory screen, you can insert new Items by pressing the + icon b on the bottom toolbar.
- 4. Choose Add Items by Name (1) and then add the new Items to the Repeat Inventory in the same way that you normally add Items to any Inventory.



continue to next page for Repeat Inventories by Location

Repeat Inventory by Location

BarkeepApp 7.0 includes a new Repeat Inventory by Location feature[•]. Here is how it works:

- I. First you select Repeat Inventory by Location.
- 2. Next choose any Location 🕒 that has entries in the original Inventory.

3:01PM			র й 100% 🗖
Bar 1: 94 Items	Full Inventory Mar 2, 2024 170 Items Value: \$6,713.32		
Absolut 1 Liter Bottles			1 Bottles
Absolut 1 Liter Bottles			0.8 Bottles \$16.96
Absolut Citron Vodka			1 Bottles \$25.75
Absolut Citron Vodka 1 Liter Bottles			2 Bottles \$51.50
Absolut Citron Vodka 1 Liter Bottles			1 Bottles \$25.75
Absolut Vanilla Vodka 1 Liter Bottles			0.3 Bottles \$7.20
Absolut Vanilla Vodka 1 Liter Bottles			1 Bottles \$24.00
Absolut Vanilla Vodka 1 Liter Bottles			1 Bottles \$24.00
Amstel Light 12 oz Bottles			8 Bottles \$10.96
Amstel Light 12 oz Bottles			4 Bottles \$5.48
Anchor Steam Beer 12 oz Bottles	Summary Report		12 Bottles \$13.20
Angry Orchard 12 oz Bottles	Summary Report by Location		4 Bottles \$5.49
Angry Orchard Crisp Apple 12 oz Bottles	Detail Report		8 Bottles \$8.00
Bacardi 151 1 Liter Bottles	Detail Report		0.8 Bottles \$17.16
Bacardi 151 1 Liter Bottles	Usage Report		0.5 Bottles \$10.73
Bacardi Ciclon 1 Liter Bottles	Repeat Inventory		1 Bottles \$10.00
Bacardi Gold	Repeat Inventory by Location		1 Bottles \$32.50
1 Liter Bottles			1.2 Bottles \$20.40
<u>ث</u>	Sort Edit	+	Done

		Mar 17(nventory 2, 2024) Items \$6,713.32		
Bar 1: 94	4 Items				
Absolut	lac				1 Bottles \$21,20
Absolut					0.8 Bottles \$16.96
	Citron Vodka				1 Bottles \$25.75
	Citron Vodka				2 Bottles \$51.50
	Citron Vodka				1 Bottles \$25.75
Absolut	Vanilla Vodka				0.3 Bottles \$7.20
Absolut	Vanilla Vodka				1 Bottles \$24.00
Absolut A	Vanilla Vodka les				1 Bottles \$24.00
Amstel L					8 Bottles \$10.96
Amstel L					4 Bottles \$5.48
A:	Choose Location				12 Bottles \$13.20
Ai 1	Store Room				4 Bottles \$5.49
Ai 1	Store Room				8 Bottles \$8.00
Bi 1	Walk-in				0.8 Bottles \$17.16
B; 1	Patio Bar				0.5 Bottles \$10.73
Bi 1	Bar 1				1 Bottles \$10.00
B; 1.					1 Bottles \$32.50
B:	Bar 2 🕒				1.2 Bottles \$20.40
ŵ	m	Sort	Edit	+	Done



- 3. The basic steps G for adding Items are the same as in a regular Repeat Inventory (see previous pages).
- **4.** Begin adding Items and start repeating the Inventory for the Location.
- 5. Like in a regular Repeat Inventory, you can interrupt the Inventory by pressing the button.

[•] This feature is not yet available in BarkeepOnline but will be including in an upcoming release.

Repeat Inventory by Location (cont.)

- 6. Even after you interrupt a Repeat Inventory, you can still come back, press the + icon and continue the Repeat Inventory in the same Location (e) (i.e., Continue with Bar 2)
- 7. When the Location is complete you will return to the Inventory screen. 0
- 8. You can stay in that Location and Add Items by Name or choose **(B)** Continue with Next Location.

Important: As soon as you Add Items by Name to a different Location, you will <u>not</u> be able to use the repeat process for that Location in this Inventory.

Note: We recommend completing the Repeat Inventory in all your Locations before adding new/additional Items.

3:03 PM			≈ 2 99% 🗖	3:04 PM					☆ 월 99% ■
Bar 2: 13 Items	Full Inventory Mar 11, 2024 13 Items Value: \$163.40			f Bar 2: 30 lt	ems	Ma	l Inventory Ir 11, 2024 30 Items Je: \$358.66		
Amstel Light 12 oz Bottles			10 Bottles \$13.70	Absolut					1 Bottles \$21.20
Bogle Pinot Noir 750 ml Bottles			4 Bottles \$28.00	Absolut Van	illa Vodka				0.5 Bottles \$12.00
Bounty Cellars Pinot Noir 750 ml Bottles			1 Bottles \$18.60	Amstel Ligh	t				10 Bottles \$13.70
Bud Light 12 oz Bottles			12 Bottles \$10.83	Bacardi 151 1 Liter Bottles					1 Bottles \$21.45
Budweiser 12 oz Bottles			15 Bottles \$13.53	Bacardi O 1 Liter Bottles					0.8 Bottles \$13.16
Crystal Geyser Alpine Spring Water 12 oz Bottles			12 Bottles \$12.00	Barton Calif 1 Liter Bottles	ornia Brandy				1 Bottles \$7.95
Crystal Geyser Sparkling Mineral Water 12 oz Bottles					Barton Gin 2 Bottl 1 Liter Bottles \$111				
Heineken 12 oz Bottles			8 Bottles \$10.98						1.2 Bottles \$6.00
Miller Lite 12 oz Bottles			9 Bottles \$8.48	Barton Reserve Whiskey 1 Liter Bottles				0.6 Bottles \$3.65	
Pacifico 12 oz Bottles			14 Bottles \$14.29	Barton Tripl 1 Liter Bottles	e Sec				0.6 Bottles \$3.39
Rolling Rock 12 oz Bottles			8 Bottles \$6.32	Barton Vodi 1 Liter Bottles	ka				2.3 Bottles \$11.50
Roses Grenadine 1 Liter Bottles			0.8 Bottles \$3.60	Bogle Pinot 750 ml Bottles	Noir				4 Bottles \$28.00
Stella Artois 12 oz Bottles			9 Bottles \$11.07	Bounty Cell 750 ml Bottles	ars Pinot Noir				1 Bottles \$18.60
				Bud Light 12 oz Bottles					12 Bottles \$10.83
		Add Items to Inventory	(Budweiser 12 oz Bottles				Add Items to Inventory	S 3
	e	Continue with Bar 2		Captain Morgan Spiced Rum 1 Liter Bottles Crystal Geyser Alpine Spring Water		8 Con	Continue with Next Location		
		Add Items by Nam	ne	12 oz Bottles Crystal Gey 12 oz Bottles	ser Sparkling M	ineral Water		Add Items by Nam	e s
🖞 🗍 Sor	Edit	+	Done	Û	圃	Sort	Edit	+	Done
	Castro Clubhouse					Cast	o Clubhouse		

- 9. When you continue to the next Location, you will repeat the same steps.
 Note: You must complete the repeat process for the Location before you choose a different Location. You will not be able to return to the Location and continue the repeat process.
- **10.** After you have completed the repeat process, you can choose to Add Items by Name. Add those Items to their appropriate Location(s).
- **II.** You also can add Items to an additional Location not in the original Inventory.

continue to next page for multiple devices

Can multiple users work on the same Repeat Inventory by Location?

Yes! But there are a few limits:

- ✓ Before you start, the new Repeat Inventory by Location must sync to other **IOS** Device(s).
- ✓ You cannot use more than one **IOS** Device for any Location in the same Repeat Inventory by Location.
- \checkmark Your co-workers can continue the Repeat Inventory on their device by selecting the + icon in the

inventory details screen and choosing Continue with Next Location.

- \checkmark BarkeepApp will only display the Location(s) \bigcirc that are still available,
- ✓ You cannot start repeating a location on one **IOS** Device and then finish it on a different **IOS** Device.

N	3:06 PM ull Inventory Mar 11, 2024 30 Items alue: \$358.66	84% 🔳	📶 Ting 🗢	3:06 PM Full Inventory Mar 11, 2024 30 Items Value: \$358.66	84%	
Bar 2: 30 Items			Bar 2: 30 Item	ns		
Absolut 1 Liter Bottles		1 Bottles \$21.20	Absolut 1 Liter Bottles		1 Bottles \$21.20	
Absolut Vanilla Vo 1 Liter Bottles	dka	0.5 Bottles \$12.00	Absolut Vanilla 1 Liter Bottles	a Vodka	0.5 Bottles \$12.00	
Amstel Light 12 oz Bottles		10 Bottles \$13.70	Amstel Light		10 Bottles	
Bacardi 151 1 Liter Bottles		1 Bottles \$21.45	Choose Location			
Bacardi O 1 Liter Bottles		0.8 Bottles \$13.16	1	Walk-in		
Add I	Items to Inventory		1	Store Room		
Continue	with Next Loc	ation		Bar 1		
Add I	tems by Name	e	1	Patio Bar		
1 liter Rottles		\$2.65	1 liter Rottles		\$3.65	
i	Cancel			Cancel		

Transfer Inventories

Transfer Inventories are used to keep track of liquor moved between Locations. You will need to create them when you move those Items if you intend to track liquor usage by Location.

Tracking Liquor by Location with limited Full Inventories

When you choose to do Full Inventories that are only in certain Locations, it is crucial that you always do Transfer Inventories.

For example, some users do a weekly Full Inventory where they count everything in the building, in all their Locations. They also do a daily "Full" Inventory where they only count in their bar station Locations. In order to run accurate Reports based on their limited "Full" Inventories, they to do Transfer Inventories when they move Items to the bar stations (i.e., stock the bar).

Note: Each Transfer Inventory has a single <u>from</u> Location, which is the Location that Items are moved out of. A single Transfer Inventory can transfer Items <u>to</u> multiple Locations.

To create a Transfer Inventory, follow the same steps used to create other Inventories:

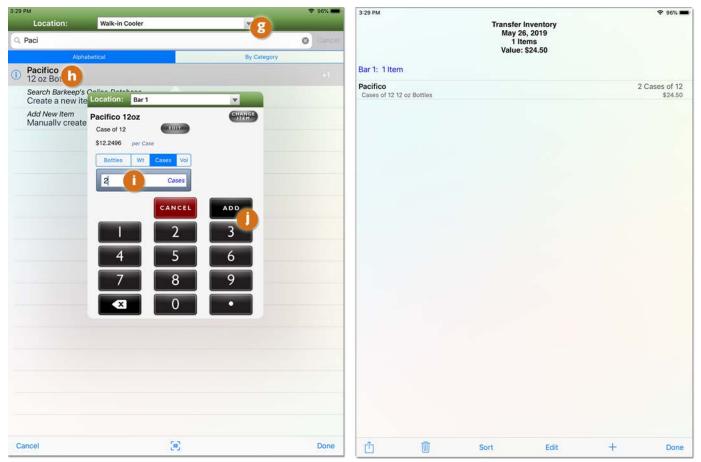
- I. Press Inventories on the Main Screen then go to the Inventories screen.
- 2. Next, press the <u>+</u> icon on the bottom toolbar on the Inventories screen <u>a</u> to create a new Inventory. On the pop-up Inventory Type screen, choose "Transfer." **b**
- 3. You can set various details G for the Inventory like the Date/Time the Inventory was taken, a general description, etc.
- **4.** When you create a Transfer Inventory you <u>must</u> select a Location. This is the Location you are transferring Items from. Press Edit **1** to activate the "Select a Location" from the pop-up menu.
- 5. After you have made your choice, press Save. CAfter pressing Save you will return to the Inventory Type screen for where you can press Start Inventory to save the new Inventory or select Cancel to discard it.

3:28 PM			🗢 96% 📖	3:28 PM			
< Barkeep	Inven	tories		Karkeep	Inventorio	es	
Transfer Inventory 0 Items in 0 Locations Value: \$0.00	Invento	ry Type	May 26, 2019 3:28 PM	Transfer Inventory 0 Items in 0 Locations Value: \$0.00	Inventory 1	Type	May 26, 2019 3:28 PM
Waste Inventory 1 Item in Walk-in Cooler Cost: \$18.00	Full Receive	ransfer Empties Return	Dropped case May 26, 2019 3:15 PM	Waste Inventory 1 Item in Walk-in Cooler Cost: \$18.00	Full Receive Waste Transf		Dropped case May 26, 2019 3:15 PM
Full Inventory 2 Items in Store Room Value: \$969.00	Date 5/26/19, 3: From Locatio		May 26, 2019 12:41 PM	Full Inventory 2 Items in Store Room Value: \$969.00	Date 5/26/19, 3:28 P From Walk-in Co		May 26, 2019 12:41 PM
Receiving Inventory 60 Items in Store Room Cost: \$4,419.40	Description Notes	Edit	Acme Liquor May 24, 2019 10:40 AM	Receiving Inventory 60 Items in Store Room Cost: \$4,419.40	Description Notes	Edit	Acme Liquor May 24, 2019 10:40 AM
Transfer Inventory 16 Items in 2 Locations Value: \$408.31			May 23, 2019 2:20 PM	Transfer Inventory 16 Items in 2 Locations Value: \$408.31			May 23, 2019 2:20 PM
Waste Inventory 1 Item in Bar 2 Cost: \$2.98			May 21, 2019 8:16 PM	Waste Inventory 1 Item in Bar 2 Cost: \$2.98			May 21, 2019 8:16 PM
Receiving Inventory 29 Items in 2 Locations Cost: \$5,936.70			ABC Beers May 21, 2019 8:00 AM	Receiving Inventory 29 Items in 2 Locations Cost: \$5,936.70			ABC Beers May 21, 2019 8:00 AM
Full Inventory 185 Items in 5 Locations Value: \$5,571.92	Cancel	Start Inventory Select a I Bar 1	Location	Full Inventory 185 Items in 5 Locations Value: \$5,571.92	Cancel	Start Inventory	May 20, 2019 9:50 AM
Waste Inventory 1 Item in Bar 1 Cost: \$5.11		Bar 2		Waste Inventory 1 Item in Bar 1 Cost: \$5.11			May 19, 2019 4:33 PM
Receiving Inventory 20 Items in Store Room Cost: \$1,810.18		Bar 3 Store Room		Receiving Inventory 20 Items in Store Room Cost: \$1,810.18			Acme Liquor May 17, 2019 4:30 PM
Transfer Inventory 18 Items in 2 Locations Value: \$609.57		Walk-in Cooler	~	Transfer Inventory 18 Items in 2 Locations Value: \$609.57			May 16, 2019 2:38 PM
Receiving Inventory 10 Items in Store Room		Cancel	Ce Save May 16, 2019	Receiving Inventory 10 Items in Store Room			Acme Liquor May 16, 2019
Cancel	Filter	Sort a +	- Done	Cancel	Filter Sor	t +	Done

Transfer Inventories (cont.)

- 6. After the Transfer Inventory is created. You will automatically navigate to the Search Items screen for the new Transfer Inventory.
- 7. You can add Items by searching. Or you can start scanning Items by pressing the scan icon. The scanning steps are the same as with other types of Inventories.
- 8. At the top of the screen, you will notice the Location menu. ⁽²⁾ Pressing the menu drops down your list of Locations and allows you to select a Location to transfer the Item(s) to (e.g., **Bar 1**).
- 9. When you select the Item (1) (e.g., Pacifico), Barkeep takes you to a pop-up screen where you can add (1) the quantity of bottles (or cases) you are moving from the Walk-in Cooler to Bar 1.

10. Then press the button () to complete the transfer or the cancel to discard your changes.



Reminder: You can transfer Items to multiple Locations in one Transfer Inventory. For example, you might remove 24 bottles **Pacifico** from your **Walk-in Cooler** and put 12 bottles in each of two bar station areas (e.g., **Bar 1** and **Patio Lounge**). To do so you would select **Walk-in Cooler** as your *transfer from* Location and then first add 12 bottles moving them to the *transfer to* Location **Bar 1** (as shown above), and then repeat the step but change your *transfer to* Location to show **Patio Lounge**.

Can I use a Transfer Inventory when I move Items between different venues?

No. A Transfer Inventory is only used for transferring Items between Locations in a single venue/club. If you have more than one venue and more than one Barkeep account, do not <u>use</u> a Transfer Inventory when you move Items between venues. When you remove Items, you would account for them in a Return Inventory and then account for the Items in a Receiving Inventory in the venue you deliver them into.

Also see <u>barkeepapp.com</u> for a guide with tips for managing Multiple Venues.

Waste Inventories

Are used to track when liquor is lost rather than used. If product is wasted or bottles break, you <u>must</u> do a Waste Inventory. Waste Inventories differentiate between liquor that has been wasted or lost versus liquor that has been sold. They are crucial for determining an accurate Variance Report and Pour Cost.

For example, if a case of **Budweiser** was dropped in the **Walk-in Cooler** in the afternoon before a Full Inventory, you need to do a Waste Inventory to show what happened to that product.

To create a Waste Inventory:

- I. Press Inventories on the Main Screen then go to the Inventories screen.
- 2. Next, press the + icon on the bottom toolbar on the Inventories screen (a) to create a new Inventory.
- 3. On the Create Inventory screen, choose "Waste." 🕒
- **4.** By default, the Date/Time for the Inventory will be the time you created it. You can select Edit if you wish to assign a specific Date/Time when the damage/loss occurred if it is different.
- 5. You can also add optional notes and descriptions for the Inventory (e.g., "Dropped case").
- 6. Press Start Inventory to save **(**) the new Inventory or select Cancel to discard it.
- 7. After the Waste Inventory is created. You will automatically navigate to the Search Items screen for the new Waste Inventory.

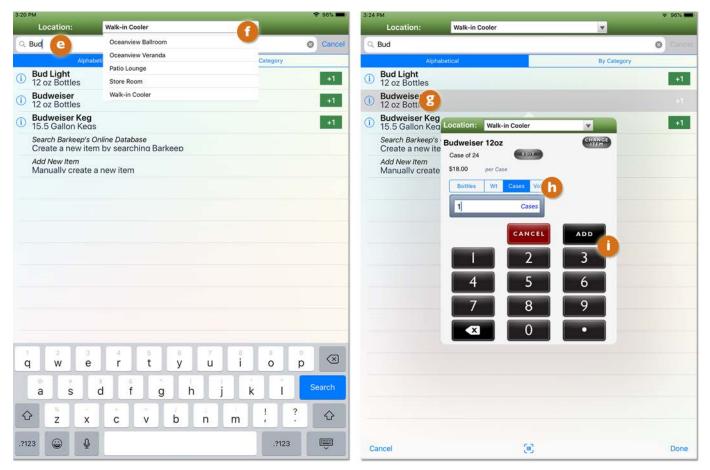
3:19 PM		🗢 96% 🛲	3:20 PM	ຈ 96% -
Karkeep	Inventories		Location: Store Room	× 1
Waste Inventory 0 Items in 0 Locations Cost: \$0.00	Inventory Type	Dropped case May 26, 2019 3:15 PM	Q. Find Item Alphabetical Absolut	By Category
Full Inventory 2 Items in Store Room Value: \$969.00	Full Waste Transfer Empties Return	May 26, 2019 12:41 PM	Absolut Absolut Absolut 750 ml Bottles	+1 +1
Receiving Inventory 60 Items in Store Room Cost: \$4,419.40	Date 5/26/19, 3:15 PM Edit Description Dropped case	Acme Liquor May 24, 2019 10:40 AM	Absolut Citron Vodka Liter Bottles	+1
Transfer Inventory 16 Items in 2 Locations Value: \$408,31	Notes Edit	May 23, 2019 2:20 PM	Absolut Grapefruit 1 Liter Bottles Absolut Mandarin Vodka Liter Bottles	+1
Waste Inventory 1 Item in Bar 2 Cost: \$2.98		May 21, 2019 8:16 PM	Absolut Pear Vodka 1 Liter Bottles	+1
Receiving Inventory 29 Items in 2 Locations Cost: \$5,936.70		ABC Beers May 21, 2019 8:00 AM	Absolut Vanilla Vodka Liter Bottles Amaretto Di Gaetano Liter Bottles	+1
Full Inventory 185 Items in 5 Locations Value: \$5.571.92		May 20, 2019 9:50 AM	Amstel Light 12 oz Bottles	+1
Waste Inventory 1 Item in Bar 1 Cost: \$5.11	Cancel d Start Inventory	May 19, 2019 4:33 PM	Anchor Steam Singles 22 Oz Bottle 22 oz Bottles	+1
Receiving Inventory 20 Items in Store Room Cost: \$1,810.18		Acme Liquor May 17, 2019 4:30 PM	Angostura 1919 750 ml Bottles Angry Orchard Crisp Apple	+1
Transfer Inventory 18 Items in 2 Locations Value: \$609.57		May 16, 2019 2:38 PM	Argy Octate Crisp Apple 12 oz Bottles Arrow Cream de Cacao 1 Liter Bottles	+1
Receiving Inventory 10 Items in Store Room Cost: \$1,827.51		Acme Liquor May 16, 2019 9:55 AM	Arrow Creme de Menthe 1Liter Bottles B & B Liqueur Litter Bottles	+1
Full Inventory 188 Items in 5 Locations		May 15, 2019	Bacardi 151 1 Liter Bottles	+1
Cancel	Filter Sort a +	Done	Cancel	Done

Waste Inventories (cont.)

- 8. You can add Items by searching. 🤒
- **9.** Or you can start scanning Items by pressing the scan icon. The scanning steps are the same as with other types of Inventories.
- 10. At the top of the screen you will notice the Location menu. Pressing the menu drops down your list of Locations and allows you to select the Location where the waste occurred (e.g., Walk-in Cooler).
- **II.** Now you can start adding Items to your Inventory following the same steps you would with any other Inventory.
- 12. The example below shows a Waste Inventory for a case of Budweiser dropped in your Walk-in Cooler. Search for the Items containing "bud" as you are looking for Budweiser.
- 13. When you select the Item (Budweiser), ⁽³⁾ Barkeep takes you to a new screen where you can add the quantity of cases (or bottles) you need to add to the Inventory.

In this example, be sure to select "Cases." 🕕

14. Then press the button it to add the ltem to the Waste Inventory or the button to discard your changes.



Note: You can also add a quantity to an Inventory by volume. For example, if a drink(s) was spilled before it was served a Waste Inventory could show the amount of liquor, wine or beer wasted in ounces.

Empties Inventories

Used to track the empty bottles (breakage) at the end of the night. Empties Inventories are not crucial; however, you can use the information from your Empties totals to:

- Have more accurate data for generating Order Reports in BarkeepOnline. Especially when you place orders more frequently than you conduct Full Inventories.
- Compare the Empties totals to Usage totals to track discrepancies. Empties Inventories have no effect on your Usage Reports. Inventories can help you track down Items that appear to be going missing.

For example, if your Empties Inventory shows 7 empty bottles of **Jack Daniels** and your Usage Report shows that you've used 8 bottles, then you *may* have a missing bottle to track down. This could indicate a bottle was stolen, miscounted, or that a bottle was dropped and broken. Broken bottles need to be entered into a Waste Inventory.

To create an Empties Inventory:

- I. Press Inventories on the Main Screen then go to the Inventories screen. Next, press the <u>+</u> icon on the bottom toolbar on the Inventories screen <u>a</u> to create a new Inventory.
- 2. On the pop-up Inventory Type screen, choose "Empty."
- 3. By default, the Date/Time for the Inventory will be the time you created it. You can select Edit if you wish to assign a specific Date/Time when the Inventory occurred if different. O You can also add optional notes and descriptions for the Inventory.
- **4.** Press Start Inventory to save **1** the new Inventory or select Cancel to discard it.
- **5.** After the Empties Inventory is created. You will automatically navigate to the Search Items screen for the new Empties Inventory.
- 6. At the top of the screen you will notice the Location menu. Make sure you have chosen the correct Location for each Item as your add it to the Inventory.
- You can add Items by searching. Or you can start scanning Items by pressing the scan icon. The scanning steps are the same as with other types of Inventories.
- 8. Now you can start adding Items to your Inventory following the same steps you would with any other Inventory.

4:40 PM			🗢 🛛 79% 🖿
< Barkeep	Inventories		
Empties Inventory 0 Items in 0 Locations Value: \$0.00			May 23, 2019 4:39 PM
Waste Inventory 1 Item in Bar 2 Cost: \$6.69	Full Receive Waste T	Empties Return	May 21, 2019 8:16 PM
Receiving Inventory 29 Items in 2 Locations Cost: \$5,936.70	Date 5/23/19, 4:39 PM Description	Edit	ABC Beers May 21, 2019 8:00 AM
Full Inventory 185 Items in 5 Locations Value: \$5,870.87	Notes	Edit	May 20, 2019 9:50 AM
Waste Inventory 1 Item in Bar 1 Cost: \$5.11			May 19, 2019 4:33 PM
Receiving Inventory 19 Items in Store Room Cost: \$1,785.53			Acme Liquor May 17, 2019 4:30 PM
Transfer Inventory 18 Items in 2 Locations Value: \$609.47			May 16, 2019 2:38 PM
Receiving Inventory 10 Items in Store Room Cost: \$1,827.51	Cancel	Start Inventory	Acme Liquor May 16, 2019 9:55 AM
Full Inventory 188 Items in 5 Locations Value: \$3,081.37			May 15, 2019 11:25 AM
Receiving Inventory 19 Items in 2 Locations Cost: \$5,785.84			ABC Beers May 14, 2019 8:10 AM
Receiving Inventory 7 Items in Store Room Cost: \$169.60			Acme Liquor May 8, 2019 8:08 AM
Receiving Inventory 6 Items in Store Room			Acme Liquor May 6, 2019
Cancel	Filter Sort	a) +	Done

Receiving Inventories

Receiving Inventories are used to track when you receive deliveries of beer, wine, liquor and all products you list as Items in BarkeepApp.

We recommend always taking a Receiving Inventory after every delivery. This step is crucial because you need to account for all Items you receive in order for Barkeep to generate correct Pour Cost and Usage Reports.

A Receiving Inventory does two important things:

- It is the way Barkeep helps you to check your delivery against your Supplier's invoice. It helps to make sure you have received all the Items you are being billed for.
- It enters all the Items received into your Barkeep account to assure accuracy when you run your Reports.

4:09 PM				₹ 48%
	May 3 14 li	Inventory 6, 2019 tems 1,719.08		
Walk-in Cooler: 14 Items				
Amstel Light Cases of 24 12 oz Bottles			8	Cases of 24 \$168.00
Anchor Steam Beer Cases of 24 12 oz Bottles			8	Cases of 24 \$211.20
Becks Cases of 24 12 oz Bottles			4	Cases of 24 \$100.60
Bud Light Cases of 24 12 oz Bottles			4	Cases of 24 \$72.00
Budweiser Cases of 24 12 oz Bottles			4	Cases of 24 \$72.00
Budweiser Keg 15.5 Gallon Kegs				2 Kegs \$184.00
Guinness Keg 13.2 Gallon Kegs				1 Kegs \$146.00
Heineken Cases of 24 12 oz Bottles			4	Cases of 24 \$118.00
Miller Genuine Draft Cases of 24 12 oz Bottles			4	Cases of 24 \$74.88
Miller Lite Cases of 24 12 oz Bottles			4	Cases of 24 \$74.88
Miller Lite Keg Cases of 1 15.5 Gallon Kegs				3 Cases of 1 \$267.00
Pabst Blue Ribbon Keg 15.5 Gallon Kegs				1 Kegs \$75.00
Red Hook ESB Keg 15.5 Gallon Kegs				1 Kegs \$126.00
Stella Artois Cases of 12 12 oz Bottles			2	Cases of 12 \$29.52
Û	Sort	Edit	+	Done

How can I use a Receiving Inventory when I move Items between different venues?

A Receiving Inventory can also be used when you remove Items from one venue/club and deliver them to another venue. If you have more than one venue and more than one Barkeep account, do not <u>use</u> a Transfer Inventory when you move Items between venues. When you remove Items, you would account for them in a Return Inventory and then account for the Items in a Receiving Inventory in the venue you deliver them into.

Also see <u>barkeepapp.com</u> for a guide with tips for managing <u>Multiple Venues</u>.

If I add Items to a Receiving Inventory, do I need to add them to my next Full Inventory?

Yes! When you do your next Full Inventory, you must count and add all the Items you have on hand. Items accounted for in earlier Receiving Inventories still must be counted in all future Full Inventories as long as they remain in stock. This is necessary to have accurate results and Reports.

Suppliers

Barkeep users have the option to add Supplier information to Receiving and Return Inventories. In order to use this feature, Suppliers have to be added to your Barkeep data.

To add or modify a Supplier:

- I. Press "Settings" on the Main Screen then go to the pop-up Settings screen.
- 2. On the pop-up Settings screen, select Suppliers.
- 3. Press the \pm icon on the bottom toolbar on the Suppliers screen \bigcirc to create a new Supplier.
- **4.** Or select an existing Supplier **(G)** if you wish to modify, add to or delete the Supplier's information.
- 5. Each Supplier has a Supplier Details screen where you add the Supplier's name details you want to keep track of in Barkeep.
- 6. Press Save to save 🕒 the new Supplier and your changes or select Cancel to discard it.

3:57 PM	중 ♥ 85% ■) 3:57 PI	м			🗢 Ø 85% 🔳)
	< Ba	arkeep	5	Suppliers	
	ABO	C Beers	-		
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Locations	Smi	ith & lor			
			Sup	plier Detai	ls
		Name	New Supplier	Address	Address
a Suppliers		Contact	Contact	City	City
BarkeepOnline		Email	Email	State	State
		Phone	Phone	Zip	Zip
Bluetooth Scale	2	Account	Account		
SETTINGS					
SEITINGS					
		Cancel			e Save
REPORTS					
REFORTS					
HELP					
	Car	ncel	Ь	+	Save

Note: Your Suppliers are also listed in your Item's Report.

to create a Receiving Inventory, continue to next page

Receiving Inventories (cont.)

To create a Receiving Inventory:

- I. Press Inventories on the Main Screen then go to the Inventories screen.
- 2. Next, press the + icon on the bottom toolbar on the Inventories screen (2) to create a new Inventory.
- 3. On the pop-up Inventory Type screen, choose "Receive." 🕒
- **4.** By default, the Date/Time for the Inventory will be the time you created it.
 - a. You can select Edit if you wish to assign a specific Date/Time when the delivery occurred.
 - b. If you are creating a Receiving Inventory much later, say the day after a delivery, we recommend editing the Date/Time to assure future Reports will be accurate.
- 5. You can add details such as the invoice amount, invoice number and Supplier to a Receiving Inventory.
- 6. You can also add optional notes and descriptions for the Inventory.
- 7. Press Start Inventory to save **(**) the new Inventory or select Cancel to discard it.
- 8. After the Receiving Inventory is created. You will automatically navigate to the Search Items screen for the new Receiving Inventory. Here you can start adding Items to your Inventory following the same steps you would with any other Inventory. If you do not want to search for Items to add to your Inventory, press Cancel at the upper part of the screen.

Waste Inventory 1 Item in Walk-in Cooler Cost: \$14.00Date 5/26/19, 3:41 PMEdit Corpoped case May 26, 2019 3:41 PMDropped case May 26, 2019 3:41 PMDropped case May 26, 2019 1:24 TPMAbsolut Citron Vodka11Ful Inventory 4 Jue: \$96000Supplier Supplier Edit EditMay 26, 2019 1:24 TPMMay 26, 2019 1:24 TPMAbsolut Citron Vodka11Receiving Inventory 40 Item in Store Room Value: \$408.31DescriptionMay 24, 2019 1:24 TPMMay 22, 2019 1:24 TPMMay 23, 2019 2:20 PMMay 23, 2019 2:20 PMMay 23, 2019 2:20 PMMay 22, 2019 3:16 PMMay 22, 2	3:42 PM			🗢 96% 🛲 ·	3:42 PM	🗢 95% 🔳
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Mase intentionMay Ba 2019 315 PMAbsolut Circo Vocka111 Item in Wake 1000er Cost: \$18.00Invoice NoMay 26, 2019 315 PM11111 Item in Wake 306 00SupplierEditMay 26, 2019 	1 Item in Bar 1	BReceive Waste Transfer E	mpties Return		Absolut	+1
Full Inventory Invoice Amt \$0.00 Invoi	1 Item in Walk-in Cooler		Edit	May 26, 2019	1 Liter Bottles	+1
Value: \$969.00SupplierSupplierEdit12:41 PM11:41	A MILLION CONTRACTOR	Invoice Amt \$0.00		3.15 PM		+1
60 Items in Store Room Cost: \$4,419.40DescriptionMay 24, 2019 10:40 AM11 Liter Bottles11Transfer Inventory Value: \$408.31Image: Store Room Cost: \$2.98NotesEditMay 23, 2019 2:20 PMImage: Store Room Cost: \$2.98Image: Store Room Cost: \$2.98Image: Store Room Cost: \$2.98Amstel LightImage: Store Room Cost: \$2.98Image: Store Room May 21, 2019 8:00 AMImage: Store Room May 21, 2019 9:00 AMImage: Store Room 1:1 Eure BottlesImage: S		Supplier Supplier	Edit			+1
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Receiving Inventory 29 Items in 2 Locations Cost: \$5,936.70CancelCanc						+1
Receiving InventoryABC Beers May 21, 2019 8:00 AMABC Beers ABC Beers 22 or BottleAnchor Steam Singles 22 Oz Bottle411122 oz Bottles411 </td <td></td> <td>Cancel ds</td> <td>tart Inventory</td> <td></td> <td>+1</td>		Cancel ds	tart Inventory			+1
Full Inventory 185 Items in 5 LocationsMay 20, 2019 9:50 AM1Waste Inventory Value: \$5,571.92May 20, 2019 9:50 AM1Waste Inventory 1 Item in Bar 1 Cost: \$5,11May 19, 2019 4:33 PM1Receiving Inventory 20 Items in Store Room Cost: \$1,810.18May 17, 2019 4:30 PM1Transfer Inventory 18 Items in 2 LocationsMay 16, 20191Battems in 2 LocationsMay 16, 20191	29 Items in 2 Locations					+1
Value: \$5,571.92 9:50 AM 1 Angry Orchard Crisp Apple 4:1 Waste Inventory May 19, 2019 1 Liter Bottles 4:1 1 tem in Bar 1 4:33 PM 1 Liter Bottles 4:1 Cost: \$1,810.18 Arrow Cream de Cacao 1 Liter Bottles 4:1 1 Arrow Cream de Menthe 1 Liter Bottles 4:1 1 Liter Bottles 1 Liter Bottles 4:1 1 Bitems in 2 Locations May 16, 2019 1 Liter Bottles	Full Inventory			May 20, 2019	Angostura 1919 750 ml Bottles	+1
I Item in Bar 1 May 19, 2019 Arrow Cream de Cacao +1 Cost: \$5.11 4:33 PM 1 Liter Bottles +1 Receiving Inventory Acme Liquor 1 Liter Bottles +1 20 Items in Store Room May 17, 2019 4:30 PM 1 Liter Bottles +1 Transfer Inventory 1 B tems in 2 Locations May 16, 2019 1 Bacardi 151 1 Liter Bottles +1					Angry Orchard Crisp Apple 12 oz Bottles	+1
Access Liquor Access Liquor Access Liquor Access Liquor 1 Liter Bottles +1 20 Items in Store Room Cost: \$1,810.18 May 17, 2019 4:30 PM B& B Liqueur 1 Liter Bottles 1 +1 Transfer Inventory 18 Items in 2 Locations May 16, 2019 May 16, 2019 1 Bacardi 151 1 Liter Bottles +1	1 Item in Bar 1					+1
20 Items in Store Room May 17, 2019 Image: B & B Liqueur +1 Cost: \$1,810.18 4:30 PM Image: Liqueur +1 Transfer Inventory May 16, 2019 Image: B & B Liqueur +1 18 Items in 2 Locations May 16, 2019 Image: Liqueur +1						+1
18 Items in 2 Locations May 16, 2019 U 1 Liter Bottles	20 Items in Store Room			May 17, 2019	B & B Liqueur	+1
Cancel Filter Sort a + Done Cancel 8 😭 Done				May 16, 2019		+1
	Cancel	Filter Sort	a +	Done	Cancel 8	Done

9. You can start scanning Items by pressing the scan icon. (2) The scanning steps are the same as with other types of Inventories.

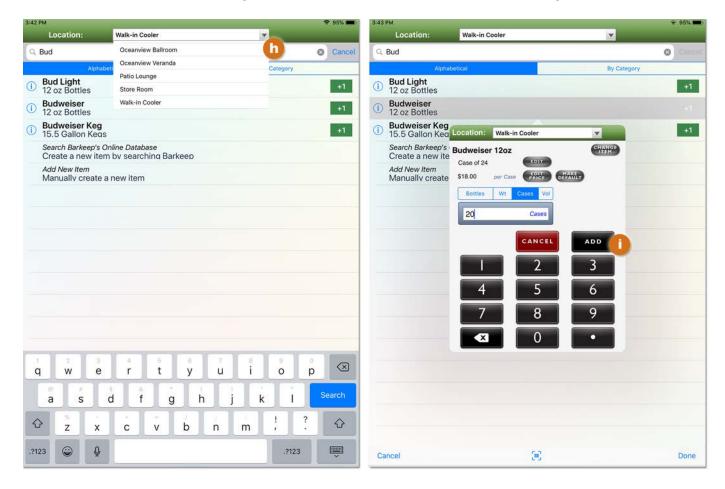
Note: If you are scanning cases, some Items may have a different UPC barcode on the outside of the case than on the actual bottle.

See page 43 for instructions for assigning more than one barcode to an Item.

Receiving Inventories (cont.)

IO. At the top of the screen you will notice the Location menu:

- Pressing the menu (1) drops down your list of Locations and allows you to select the Location where the delivery was received (e.g., Walk-in Cooler).
- If you place the received Items in more than one Location (e.g., **Store Room** and **Walk-in Cooler**) be sure to switch Locations for those Items as needed during the Inventory.
- We recommend adding all the Items for each Location before switching Locations.



Most bars and clubs will be receiving Items to storage Locations such as a **Store Room** or **Walk-in Cooler**. As Items are moved to various Bar Locations, you will need to create a Transfer Inventory when you move those Items if you intend to track liquor usage by Location.

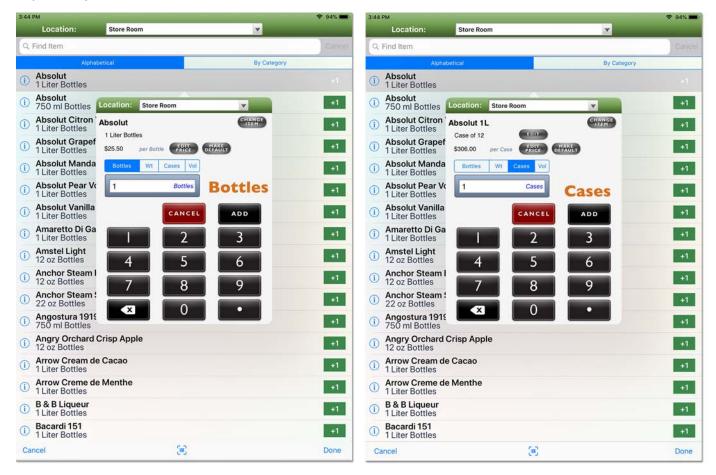
II. If you add Items by searching, or scanning, the final step for every Item is always to press the button is add the Item to the Receiving Inventory or the cancel button to discard the Item.

Note: As soon as a Receiving Inventory is complete, we recommend that you verify that the amount of beer and liquor on the Invoice matches the amount of beer and liquor that you actually received. This step will help you to immediately spot and correct an error in your Barkeep data.

Receiving Inventories – Adding Cases

When adding Items to a Receiving Inventory you can add Items by the Bottle (or other Container Type e.g., Can, Keg, etc.) or you can add Items by the Case. When entering Items by Case, you enter the Case price instead of the per Bottle price.

The example above shows where you can add Bottles of **Absolut** by the Bottle at \$25.50 each or by the Case of 12 at \$306.00 per Case. This feature can be particularly useful if your Supplier's invoice shows Items priced by the Case.



Note: A price of a Bottle can be a fractional cent. The example below shows **Amstel Light** for \$21.00 per Case. When you divide the Case Price by the number of Bottles (24), the Bottle Price is 87.5 ¢ per Bottle. Also note, that a Case Price cannot be a fractional number.

Location:	Walk-in Cooler		Location: Walk-in Cooler	*
Amstel Lig Case of 24 \$21.00	EDIT	CHANGE	Amstel Light 12 oz Bottles \$0.875 per Bottle	HAKE
Bottles	Wt Cases We	Cases	Bottles With Comp With Quantity Bottles	Bottles
	CANCEL 2	ADD 3	CANCEL 1 2	ADD 3
4	5	6	4 5	6
7 • 🛛	8 0	9	7 8 ▲ 0	9

Receiving Inventories (cont.) Adding Case *and* Bottle Barcodes

You may assign more than one barcode for the same Item. For example, many manufacturers have a barcode for a single bottle as well as different barcodes for a case of 6 bottles and 12 bottles, etc.

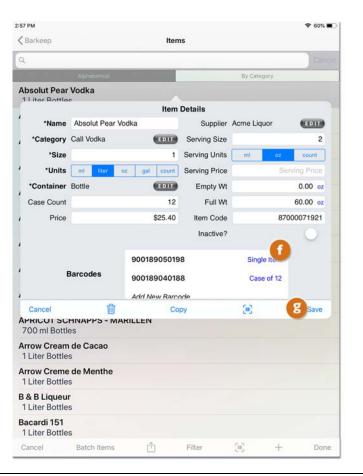
Basically, you repeat the steps for adding a barcode. Below is an example where an Item has a barcode for a bottle, and you wish to now add the <u>additional</u> barcode for the <u>same</u> Item that appears on the case.

- I. Select the Item from your Items List. (2)
- 2. After selecting the Item, you will be taken to the Item Details screen.
- 3. Select "Add New Barcode." 🕒
- 4. On the Barcode Details screen select "Case."
- 5. Barkeep's default Case Count is 12. Change the Case Count if there is different number of bottles per bottles per case (e.g., 24).
- 6. You could enter the barcode manually, but let's assume you are scanning it.
- 7. On the bottom toolbar the scan icon 🕑 to activate your iPad's camera or the Infinea Tab scanner. The scanner will beep to indicate the barcode has been successfully scanned and added to the Item Details. If using your iPad's camera, press Done after the barcode is read.

2:57 PM					🗢 60% ■◯	2:58 PM						≑ 60% ∎⊃
🗸 Barkeep		Item	IS			🗸 Barkeep		Items				
٩					(cance)	Q						Candel
	Alphabetical			By Category			Alphiabetical			By Cate	igory	
Absolut Pear						Absolut Pear		- A				
		Item	Details									
*Name	Absolut Pear Vodka		Supplier	Acme Liquor	EDIT			Barcode D	C - 100 - 100	-		
, *Category	Call Vodka	EDIT	Serving Size		2		Item	Absolut Pear Vo	idka	EDIT		
*Size		1	Serving Units	ml oz	count		Barcode	Barcode				
' *Units	ml liter oz	gal count	Serving Price		Serving Price			Single Item	Cas	. C		
*Container	Bottle	EDIT	Empty Wt		0.00 oz		Туре	Single Rem	003		·	
Case Count		12	Full Wt		60.00 oz		Case Cnt			12	0	
/ Price		\$25.40	Item Code	8	37000071921						-	
			Inactive?		0 -							
, ı	Para da C	0018905019 Id New Barco		Single Item								
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APRICOT SC 700 ml Bottle	HNAPPS - MAKILL	EN			Market L	700 ml Bottle	INAPPS - MARI S	LLEN				
Arrow Cream 1 Liter Bottle						Arrow Cream 1 Liter Bottles						
Arrow Creme 1 Liter Bottle						Arrow Creme 1 Liter Bottles						
B & B Liqueu 1 Liter Bottle						B & B Liqueur 1 Liter Bottles						
Bacardi 151 1 Liter Bottle	s					Bacardi 151 1 Liter Bottles						
Cancel	Batch Items	Ó	Filter	(m) +	- Done	Cancel	Batch Items	Ċ F	ilter	(m)	+	Done

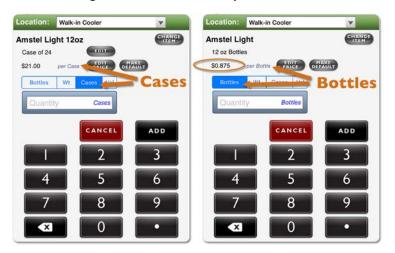
Receiving Inventories (cont.) Adding Case and Bottle Barcodes

- 8. Barkeep will take you back the Item Details screen. Notice there are now two barcodesfor the same Item.
- 9. Press to Save (2) the barcode or select Cancel to discard the changes.



Cases vs. Bottles – an important reminder!

When adding Items to an Inventory remember to switch between Bottles and Cases (see below).



BarkeepApp remembers the last Container Type used by default. For example, if you added 3 bottles of **Budweiser** and then want to add 2 cases of **Heineken**, Barkeep will be set to add Bottles unless you switch to Cases.

Note the exception: When you scan a Case barcode, Barkeep recognizes that you have set the barcode as a Case barcode and will automatically switch to Cases.

Important: We recommend <u>only</u> scanning barcodes for <u>full</u> cases.

To avoid errors in your Inventory, do <u>not</u> add partial cases. For example, if you were to scan the Case barcode for a partial case, say with 9 bottles instead of 12, you would have to carefully edit the entry to indicate it was .75 Cases. Or you would have to manually edit the entry and change it to 9 bottles. It is much better to simply switch from Cases to Bottles (shown above) and then enter 9 bottles and never enter any Item to your Inventory as a partial case.

Receiving Inventories (cont.) Verifying Amount Totals

As soon as a Receiving Inventory is complete, we recommend that you verify that the amount of beer and liquor on the Invoice matches the amount of beer and liquor that you actually received. This step will help you to immediately spot and correct an error in your Barkeep data and make sure all your Reports are accurate.

Acn	ne B	eer	Dist	ributi	on				2:38 PM		Receiving Inve Feb 26, 201 6 Items Cost: \$1,232	18	२ 70%
	Invo	ice					Acme		Walk-in Co	oler: 6 Items			
	Bill To My Bar 123 Mark			Ship To: My Bar 123 Market S San Francisco	treet				Bud Light Cases of 24	12 oz Bottles			8 Cases of 2 \$144.0
	San Fran	cisco, CA 9	4109	San Francisco	D. CA 94109				Budweiser Cases of 24	12 oz Bottles			12 Cases of 2 \$216.0
	Invoice	#.	123D000	02					Heineken Cases of 24	12 oz Bottles			6 Cases of 2 \$177.0
	Invoice Custon	Date:	2/26/18 XXSF000						Michelob L Cases of 24	l tra 12 oz Bottles			5 Cases of 2 \$96.0
									Miller Genu Cases of 24	i ine Draft 12 oz Bottles			20 Cases of 2 \$374.4
to	Your C	Order #	Our Order #	Sales Rep.	FOB \$	Ship Via	Terms	Tax ID	Miller Lite				12 Cases of 2
/26/18	8 65432		123D-0678				30 Days		Cases of 24	12 oz Bottles			\$224.6
antity	Item	Units	Description	n	Discount %	Taxable	Unit Price	Total					
No.	Cases	24	Budweiser			Mark Charles	and the second sec	\$144.00					
g i	Cases	24	Budweiser		-			\$216.00					
	Cases	24	Heineken		-			\$177.00					
	Cases	24	Michelob L	litra	-			\$96.00					
	Cases	24	Miller Gon					\$374.40					
-	00000		Vinney Service Con			-		\$224.64					
		B	alance	Due	\$1,23	32.04		\$1,232.04					
-	_	_	_			-	Do. TOTY	free					
	TANCE ner ID: 123L	D					Miscellan, vs	<u>.</u>					
	/15/14						Balance Due	\$1,232.04					
	t Due: t Enclosed	10											
moun	Enclosed.		-										
Acr	ne Beer	Distri	ibution	1234 Bro Oakland	adway CA 94001		510-555-1212 0-555-1212						
				Crantanto,		Tak on	e une randi		l,				
									Ô	Ŵ	Sort	Edit -	- Doi
										<u>الل</u>	Join	Cont	DI

If the Inventory Cost (total) and the Supplier invoice total do <u>not</u> match this could indicate a number of problems:

- A Supplier mistake, i.e., billing you for product that was not delivered.
- The total amount might include a delivery charge that you do not track in Barkeep. If so, match the Inventory Cost to the subtotal for product on your Supplier's invoice.
- Maybe Items were miscounted. Are the quantities correct?
- Maybe an incorrect Item was entered in Barkeep.
- Maybe Cases were entered instead of Bottles or vice versa.
- Check that the amount of Items in the Inventory match the amount of Items on the invoice.
- Look for price changes. If your Supplier has discounted or increased a price for an Item, you will need to make this change in your Receiving Inventory

continue to next page for price changes

Receiving Inventories (cont.) Price Changes

If your Supplier has charged a different Item price, you need to edit the Item's information and update the price for the Item. You can do this during a Receiving Inventory when you enter the new price. If the price change is permanent, be sure to select to make the new price the default price.

Below is an example that shows an instance where the vendor has increased for an Item and you have to return to the Inventory to make a correction:

- 1. Your Inventory Cost (total) is \$1,719.08 2 but your Supplier's Invoice shows a total of \$1,727.48
- 2. Review your Receiving Inventory and compare it to your Supplier's Invoice and look for discrepancies.
- **3.** Discover that your Supplier charged \$29.70 per case of **Heineken** and the price you have for the Item in Barkeep is \$27.60 per case.
- 4. Select the Item Heineken () and choose the FRICE button to () edit the price.

4a. If the change is permanent, and it is the Item's new default price, select the **DEFAULT** button.

4b. An alert will appear verifying the changed price. **Ok**" to continue.

5. Press **SAVE** to save **(**) the new price or select **CANCEL** to discard the price change.

4:09 PM		🗢 48% 🔳	4:09 PM			👻 48% 🔳 🔿
	Receiving Inventory May 3, 2019 14 Items Cost: \$1,719.08			Ma 1	ng Inventory y 3, 2019 4 Items : \$1,719.08	
Walk-in Cooler: 14 Items			Walk-in Cooler: 14 Iten	ns		
Walk-in Cooler: 14 Items Amstel Light Cases of 24 12 oz Bottles Anchor Steam Beer Cases of 24 12 oz Bottles Becks Cases of 24 12 oz Bottles Bud Light Cases of 24 12 oz Bottles Budweiser Cases of 24 12 oz Bottles Budweiser Keg 13.5 Gallon Kegs Heineken Cases of 24 12 oz Bottles Miller Genuine Draft Cases of 24 12 oz Bottles Miller Lite Cases of 24 12 oz Bottles Miller Lite Keg Cases of 24 12 oz Bottles Miller Lite Sallon Kegs Pabst Blue Ribbon Keg 15.5 Gallon Kegs		8 Cases of 24 \$188.00 8 Cases of 24 \$211.20 4 Cases of 24 \$100.60 4 Cases of 24 \$72.00 4 Cases of 24 \$72.00 2 Kegs \$184.00 4 Cases of 24 \$72.00 2 Kegs \$146.00 4 Cases of 24 \$146.00 4 Cases of 14 \$146.00 1 Kegs \$126.00 1 Kegs \$126.00	Walk-in Cooler: 14 Iten Amstel Light Cases of 24 12 oz Bottles Becks Cases of 24 12 oz Bottles Bud Light Cases of 24 12 oz Bottles Budweiser Cases of 24 12 oz Bottles Budweiser Keg 15.5 Gallon Kegs Heineken Cases of 24 12 oz Bottles Miller Genuine Draft Cases of 24 12 oz Bottles Miller Genuine Draft Cases of 24 12 oz Bottles Miller Cenuine Draft Cases of 24 12 oz Bottles Miller Lite Cases of 24 12 oz Bottles Miller Lite Keg Cases of 126 Sallon Kegs Pabst Blue Ribbon Keg Red Hook ESB Keg 15.5 Gallon Kegs	Location: Walk-in Heineken 12oz Case of 24 S29.70 Bottles Wt 4 DELETE	Cooler	8 Cases of 24 \$168.00 8 Cases of 24 \$211.20 4 Cases of 24 \$72.00 4 Cases of 24 \$72.00 2 Kegs \$184.00 4 Cases of 24 \$146.00 4 Cases of 24 \$146.00 4 Cases of 24 \$148.00 4 Cases of 24 \$74.88 3 Cases of 24 \$74.88 3 Cases of 124 \$74.88 3 Cases of 124 \$74.88 5 Cases of 124 \$74.88 5 Cases of 124 \$74.89 \$75.00 1 Kegs \$75.00
Stella Artois Cases of 12 12 oz Bottles		2 Cases of 12 \$29.52	Stella Artois Cases of 12 12 oz Bottles		Oke	2 Cases of 12 \$29.52
Ċ 🔟	Sort Edit	+ Done	Ċ 🛈	Sort	Edit +	Done

Note: You can only change prices in a Receiving or Return Inventory. You cannot change a price when conducting other types of Inventories. The other way to change an Item's price is to edit an Item in your Item's List.

Distributor Promotions and Free Products

Sometimes Suppliers offer special deals. It is crucial to enter those Items correctly into your Receiving Inventories for accurate Barkeep Reports.

What happens when my Supplier charges a special price or gives me products for free? With every Receiving Inventory, it is essential that you enter the price you pay for the Item for that particular delivery. If the price is discounted, enter the price you paid for the Item for that delivery. If you receive Items for free, you should enter the Items and enter the price you pay as \$0.

Do I have to count and add free Items to my Receiving Inventory? Yes! Even if you receive products for free, you need to add them to a Receiving Inventory. If you do not add the Items, your future Reports will be inaccurate.

Below is an example of a Receiving Inventory with some free Items from your Supplier. For this order, your Supplier gave you a free bottle of **Bacardi Coconut Rum**. There is also a 2-for-1 promotion for **Midori**. Here is the proper way to enter those Items:



- When you add the Item to your Receiving Inventory, choose the **PRICE** button to **a** edit the price, and change it to \$0 and then **ADD** the Item. **b**
- Do <u>not</u> select the **DEFAULT** button.
- When you review the Receiving Inventory, note the quantity for **Bacardi Rum Coconut** is 1 bottle and the cost is \$0.00
- With a 2-for-1 promotion, like in this example with Midori, we recommend entering the ltem the way it appears on the Supplier's invoice. Our invoice had one line for a bottle of Midori at the regular price (\$19.00). For the second bottle, Midori was listed with a cost of \$0. We chose the price button and changed the price to \$0 for that bottle.
- You also might enter a quantity of 2 and edit the price to half the normal cost (i.e., \$9.50) if the Item appears that way on a Supplier's invoice.

Receiving Inventories (cont.) Adding Suppliers to Receiving Inventories

To add a Supplier to a Receiving Inventory:

- I. On the bottom toolbar press Edit. 🧕
- **2.** On the Inventory Type screen, press **Edit (**) next to the Supplier field.
- **3.** This activates a screen with a picker **C** where you choose one of your Suppliers to assign to the Receiving Inventory (e.g., **ABC Beers**).
- **4.** Press Save to save **(u)** your choice or select Cancel to discard it.
- 5. The final step is to press Save 😳 on the bottom toolbar of the Inventory Type screen.

4:22 PM	Receiving Inventory May 1, 2019 7 Items Cost: \$1,312.08		축 45% ∎_>	4:22 PM	Receiving Inventory May 1, 2019 7 Items Cost: \$1,312.08	� 45% ∎⊃
Walk-in Cooler: 7 Items	Inventory Type			Walk-in Cooler: 7 Items	A	
Angry Orchard Crisp App Cases of 24 12 oz Bottles	Full Receive Waste Transfer Empt	ies Return	8 Cases of 24 \$192.00	Angry Orchard Crisp Apple Cases of 24 12 oz Bottles	Choose a Supplier	8 Cases of 24 \$192.00
Bud Light Cases of 24 12 oz Bottles	Date 5/1/19, 4:20 PM	Edit	8 Cases of 24 \$144.00	Bud Light Cases of 24 12 oz Bottles		8 Cases of 24 \$144.00
Budweiser Cases of 24 12 oz Bottles	Invoice No ABD1200000040	9	12 Cases of 24 \$216.00	Budweiser Cases of 24 12 oz Bottles	1	12 Cases of 24 \$216.00
Corona Extra Cases of 24 12 oz Bottles	Invoice Amt \$1,313.08		12 Cases of 24 \$316.80	Corona Extra Cases of 24 12 oz Bottles	ABC Beers	12 Cases of 24 \$316.80
Heineken Cases of 24 12 oz Bottles	Supplier Supplier	Edit	6 Cases of 24 \$178.20	Heineken Cases of 24 12 oz Bottles	Acme Liquor	6 Cases of 24 \$178.20
Pacifico Cases of 12 12 oz Bottles	Description		12 Cases of 12 \$147.00	Pacifico Cases of 12 12 oz Bottles	Markor Dar Chikland	12 Cases of 12 \$147.00
Stella Artois Cases of 12 12 oz Bottles	Notes	Edit	8 Cases of 12 \$118.08	Stella Artois Cases of 12 12 oz Bottles		8 Cases of 12 \$118.08
	Cancel	e Save			Cancel d Save	Ţ.
rh Mi	Sort Edit	a +	Done	rh mΩ		
	SOIL Edit	(a) +	Done	Ū W	Sort Edit	+ Done

Note: If you need to add a new Supplier to the Inventory, first you need to go to the Supplier screen in your Settings.

Receiving Reports

BarkeepOnline users have the option to run a Receiving Report.

Receiving Reports can be useful for double-checking that all of your invoices have been accurately entered into Barkeep while analyzing a Variance or Pour Cost Report. The Receiving Report is based on the data from your Receiving Inventories. You can see how much liquor you have received during a specific period of time. You can group the data by Category, Supplier or Invoice.

Perpetual Reports

BarkeepOnline users have the option to run a Perpetual Report. This is the Report that will help you estimate a running total of the Items you have on hand before your next Full Inventory. A Perpetual Report factors in your Full Inventory and any Receiving and/or Waste Inventories you have entered since that Full Inventory.

See the **BarkeepOnline User Guide** for instructions for Receiving Reports and Perpetual Reports.

Return Inventories

Return Inventories are ways to account for products returned to a Supplier.^{*} They are basically the opposite of Receiving Inventories. These typically match up to credit invoices from your Supplier. Items entered into Return Inventories will show up as negative amounts in the Received column of a Usage Report.

For example, if you receive a case of **Absolut** and return two bottles of **Absolut** the Receiving quantity in your Usage Report will be 12-2=10. If you return a case of **Absolut** and receive none, the receiving quantity in your Usage Report will be -12.

To create a Return Inventory:

- I. Press Inventories on the Main Screen then go to the Inventories screen.
- 2. Next, press the <u>+</u> icon on the bottom toolbar on the Inventories screen <u>a</u> to create a new Inventory. On the pop-up Inventory Type screen, choose Return Inventory.
- 3. You can set various details G for the Inventory like the Date/Time the Inventory was taken, a Supplier invoice number, invoice amount, a general description, etc. You have the option to add a Supplier to a Return Inventory. The steps are the same as those shown on the previous page for adding Suppliers to a Receiving Inventory.
- 4. Press Start Inventory to save the new Inventory or select Cancel to discard it.
- 5. You will automatically navigate to the Search Items screen for the new Receiving Inventory. You can start adding Items to your Inventory following the same steps you would with any other Inventory. Here you can start adding Items to your Inventory following the same steps you would with any other Inventory.

10:31 AM		🗢 100% 🛲	10:31 AM	÷ 100% 🛲
〈 Barkeep	Inventories		Location: Store Room	•
Return Inventory 0 Items in 0 Locations Cost: \$0.00		May 27, 2019 10:30 AM	Alphabetical	By Category
Transfer Inventory 1 Item in Bar 1 Value: \$24.50	Inventory Type	May 26, 2019 3:28 PM	Absolut 1 Liter Bottles Absolut 750 ml Bottles	+1
Waste Inventory 1 Item in Walk-in Cooler Cost: \$18.00	Date 5/27/19, 10:30 AM Edit	Dropped case May 26, 2019 3:15 PM	Absolut Citron Vodka Liter Bottles	+1
Receiving Inventory 61 Items in Store Room	Invoice Amt \$0.00	Acme Liquor May 24, 2019	Absolut Grapefruit 1 Liter Bottles Absolut Mandarin Vodka	+1
Cost: \$5,906.44	Supplier Supplier Edit	10:40 AM	1 Liter Bottles	+1
Transfer Inventory 16 Items in 2 Locations	Description	May 23, 2019	Absolut Pear Vodka Liter Bottles	+1
Value: \$408.31 Waste Inventory	Notes Edit	2:20 PM	Absolut Vanilla Vodka 1 Liter Bottles	+1
1 Item in Bar 2 Cost: \$2.98		May 21, 2019 8:16 PM	(i) Amaretto Di Gaetano 1 Liter Bottles	+1
Receiving Inventory 29 Items in 2 Locations		ABC Beers May 21, 2019	Amstel Light 12 oz Bottles	+1
Cost: \$5,936.70	Cancel d Start Inventory	8:00 AM	Anchor Steam Beer 12 oz Bottles	+1
Full Inventory 185 Items in 5 Locations Value: \$5,571.92		May 20, 2019 9:50 AM	Anchor Steam Singles 22 Oz Bottle 22 oz Bottles	+1
Waste Inventory			Angostura 1919 750 ml Bottles	+1
1 Item in Bar 1 Cost: \$5.11		May 19, 2019 4:33 PM	i Angry Orchard Crisp Apple 12 oz Bottles	+1
Receiving Inventory 20 Items in Store Room Cost: \$1,810.18		Acme Liquor May 17, 2019 4:30 PM	i Arrow Cream de Cacao 1 Liter Bottles	+1
Transfer Inventory		4.00 PM	Arrow Creme de Menthe 1 Liter Bottles	91
18 Items in 2 Locations Value: \$609.57		May 16, 2019 2:38 PM	B&BLiqueur 1 Liter Bottles	+1
Receiving Inventory 10 Items in Store Room		Acme Liquor May 16, 2019	(i) Bacardi 151 1 Liter Bottles	+1
Cancel	Filter Sort a	+ Done	Cancel	Done

^{*} If you have more than one club/venue, a Return Inventory can also be used when your remove Items to move them over to a different venue. See <u>barkeepapp.com</u> for a guide with tips for managing <u>Multiple Venues</u>.

Return Inventories (cont.)

Positive and Negative Numbers in Return Inventories

When you enter a quantity into any Barkeep Inventory you <u>only</u> enter positive numbers. Never enter negative numbers.

For example, when you enter quantities into a Return Inventory you would enter a positive number. The example below shows the return of 6 cases (72 bottles) of **Red Tree Cabernet**. Barkeep does the calculations automatically in Reports and shows negative numbers where appropriate.

		Return Invent May 27, 201 2 Items Cost: \$923.5	9	
tore Room: 2 Iten	ns			
erlot - Sutter Hor				4 Cases of 12
ed Tree Cabernet Cases of 12 750 ml Bo	Sauvignon			6 Cases of 12
	Location:	Store Room		
	Case of 12 \$90.00 Bottles	per Case FAITE	DEFAULT	
		CANCEL 2	ADD 3	
	4 7	5 8 0	6 9 •	

Deleting Inventories

If you do <u>not</u> register your **iPad** (or the **iOS** Device you use) with BarkeepOnline, by default all your Inventories will remain on your **iPad**. You may choose to delete individual Inventories (see instructions below).

Note: Your Inventories and other data will <u>not</u> be backed-up unless you choose to back-up your **iPad** to your laptop or desktop computer. Only users who have registered their **iOS** Device(s) with BarkeepOnline can take advantage of the automatic syncing feature and back-up their data to the Barkeep server.

To manually delete an Inventory:

- I. On the Inventory screen a press the i icon on the bottom toolbar. Press Delete Inventory to confirm you would like to delete the Inventory b or press Cancel to keep it.
- 2. Or, you can also delete an Inventory from your Inventory List by swiping your finger horizontally across the Inventory on the List screen C and then pressing the Delete button. This will immediately delete the Inventory.
- 3. Deleting an Inventory is permanent.

Note: BarkeepOnline users will have the Inventory permanently deleted from their BarkeepOnline Account after your **iPad** Syncs Automatically to the Barkeep server. Only BarkeepOnline users can restore deleted Inventories.

3:58 PM				♥ 84%	3:58 PM				
	Receiving Invent May 17, 2019				Karkeep	Inv	entories		
	19 Items Cost: \$1,785.5	3			Waste Inventory 1 Item in Bar 2 Cost: \$6.69				May 21, 2019 8:16 PM
Store Room: 19 Items					Transfer Inventory				U.I.U.I.M
Barton California Brandy Cases of 12 1 Liter Bottles				1 Case of 12 \$94.80	46 Items in 2 Locations Value: \$2,085.40				May 21, 2019 8:00 AM
Barton Gin Cases of 12 1 Liter Bottles				4 Cases of 12 \$264.00	Receiving Inventory				ABC Beers
Barton Gold Rum Cases of 12 1 Liter Bottles				1 Case of 12 \$60.00	29 Items in 2 Locations Cost: \$5,936.70				May 21, 2019 8:00 AM
Barton Light Rum Cases of 12 1 Liter Bottles				1 Case of 12 \$66.00	Full Inventory 185 Items in 5 Locations				May 20, 2019
Barton Reserve Whiskey Cases of 12 1 Liter Bottles				4 Cases of 12 \$291.84	Value: \$5,870.87				9:50 AM
Barton Triple Sec Cases of 12 1 Liter Bottles				2 Cases of 12 \$120.00	Waste Inventory 1 Item in Bar 1				May 19, 2019
Barton Vodka Cases of 12 1 Liter Bottles	Delete Inventory? This Receiving Inventory from May 17,			6 Cases of 12 \$360.00	Cost: \$5.11				4:33 PM
DeKuyper Anisette 1 Liter Bottles	2019 with 19 Items will be p deleted. Are you s			1 Bottles \$9.08	in Store Room 785.53		C	May	e Liquor 17, 2019 Delete
DeKuyper Blue Curacao	Delete Invento	bry D		2 Bottles \$18.66	785.53 Transfer Inventory	-	-		4:30 PM
DeKuyper Blue Curacao 1 Liter Bottles	Cancel			1 Bottles \$9.85	18 Items in 2 Locations Value: \$609.47				May 16, 2019 2:38 PM
DeKuyper Buttershots 1 Liter Bottles				1 Bottles \$8.33	Receiving Inventory				Acme Liquor
DeKuyper Cactus Juice Cases of 12 1 Liter Bottles				1 Case of 12 \$116.04	10 Items in Store Room Cost: \$1,827.51				May 16, 2019 9:55 AM
DeKuyper Creme de Cassis 1 Liter Bottles				1 Bottles \$10.07	Full Inventory 188 Items in 5 Locations				May 15, 2019
DeKuyper Sour Apple Pucker				1 Bottles \$9.62	Value: \$3,081.37				11:25 AM
DeKuyper Wilderberry 1 Liter Bottles				1 Bottles \$9.40	Receiving Inventory 19 Items in 2 Locations				ABC Beers May 14, 2019
DeKuyper Wilderberry 1 Liter Bottles				1 Bottles \$9.40	Cost: \$5,785.84 Receiving Inventory				8:10 AM Acme Liquor
Juarez Tequila Cases of 12 1 Liter Bottles				2 Cases of 12 \$120.00	7 Items in Store Room Cost: \$169.60				May 8, 2019 8:08 AM
Smirnoff Vodka Cases of 12 1 Liter Bottles				1 Case of 12 \$138.96	Receiving Inventory				Acme Liquor
Smirnoff Vodka				6 Bottles	6 Items in Store Room				May 6, 2019
n an	Sort E	Edit	+	Done	Cancel	Filter	Sort	+	Done

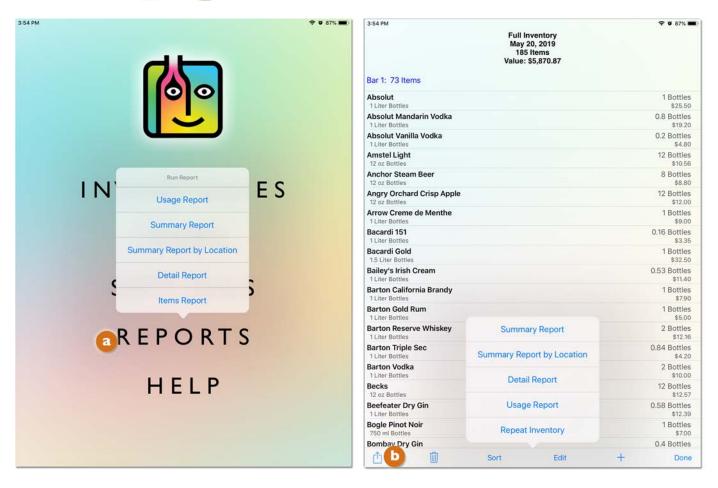
Note: Users registered with BarkeepOnline can take advantage of the Auto Delete feature that will automatically remove Inventories from your **iPad** after 120 days from the Inventory Date. This prevents your **iPad** from being filled with older Inventories. With a BarkeepOnline account, your older Inventories always remain available on our server, so there is no reason to keep the older Inventories on your **iPad**.

Reports

Running a Report

Barkeep provides several different built-in reports. These reports are available either by:

- Pressing the Reports a on the BarkeepApp Main Screen or
- 2. Pressing action (1) icon (1) on the left side of the bottom toolbar for a particular Inventory.



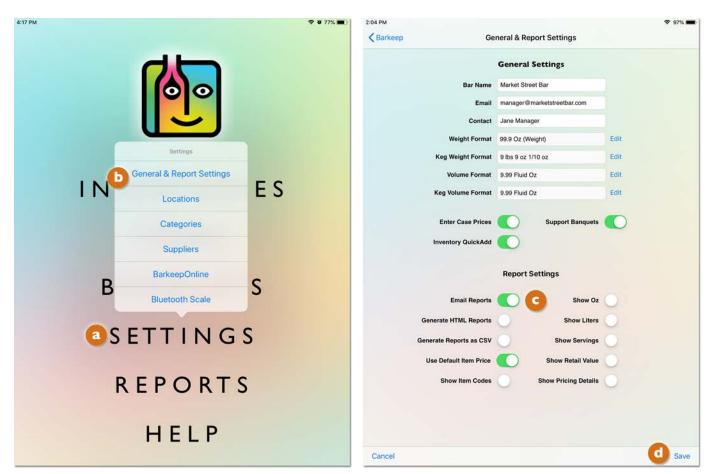
Report Settings

When you run Reports in BarkeepApp you have a choice of several different, optional settings.

Note: The choices you make for Report Settings are unique to BarkeepApp on the **iPad** you are using. You may select different options in BarkeepOnline, or additional Devices registered to the same account.

To configure any Report Settings for your iPad:

- Select "Settings" <a>[]
 Government of the Main Screen.
- 2. Next select General & Report Settings.
- 3. On the lower half of the screen, you will see the Report Settings switch next to each option.
- 4. Switch 🚺 to the on position every option you would like to activate. 🧧
- 5. Press Save on the bottom toolbar d to save your changes or select to Cancel discard them.
- 6. You can deactivate any of the options by following the same steps but moving the switch to the off position.



On the following pages you'll find descriptions of the different General Settings.

Report Settings (cont.)

Email Reports 🌔

When you run a report, BarkeepApp automatically creates an email. The email contains both an HTML version of the report, which is embedded in the text of the email, and an attached Excel spreadsheet version of the report. By default, the email is sent to the email address specified in your Account Settings.

You must also set up email on your iPad

In order to generate a report, your **iPad** must be capable of sending email. Please verify that you have set up an email account on your **iPad** and that you are able to send email using the default **iOS** Mail program before attempting to run a report in BarkeepApp.

Can I email Reports to someone else?

Yes, like with any email you can change or add additional email addresses to the email before you press **Send**. For example, if you wanted to share a Report with an owner, coworker, etc.

What happens if I do not email Reports?

If you turn off **Email Reports** Instead you will see a screen with downloading/sharing options such as using **AirDrop** Report to **iCloud**.

2:10 PM				÷ 96% 🔳	2:10 PM					🗢 95% 🔳
Karkeep	Ge	neral & Report Settings					Usa	ige Report		
		General Settings						rt and End Inventory r Usage Report		
	Bar Name	Market Street Bar								
	Email	manager@marketstreetbar.com				Start Inventory	Full Inventory	on 5/15/19, 11:25 AM	Cho	ose
	Contact	Jane Manager				End Inventory	Full Inventory	on 5/20/19, 9:50 AM	Cho	ose
	Weight Format	99.9 Oz (Weight)	Edit			Locations	All		Cho	ose
	Keg Weight Format	9 lbs 9 oz 1/10 oz	Edit				Report Options			
	Volume Format	9.99 Fluid Oz	Edit						-	
	Keg Volume Format	9.99 Fluid Oz	Edit		Gr	oup by Location	0	Show Pricing Details		
					Use De	efault Item Price		Show Usage by Oz		
	Enter Case Prices	Support Banquets			Exclude	Banquet Usage	00	Show Usage by Liter	00	
	Inventory QuickAdd				Generate	Reports as CSV	0	Show Usage by Serving		
						Email Reports	01	Show Retail Value		
	•	Report Settings			-					
	2 Email Reports	Show Oz				irDrop. Share instantly ou'll see their names h		they turn on AirDrop from Control (Center on iOS or from F	inder on the Mac,
	Generate HTML Reports	Show Liters	5		Ь					
	Generate Reports as CSV	Show Servings	-		-					
		~						1000		
	Use Default Item Price	Show Retail Value								
	Show Item Codes	Show Pricing Details			Message	Mail Add t	to Notes Save PDF iBooks	to More		
									0	
Cancel				Save	Slideshow	AirPlay	Hide Assign Conta		Add To iClou Drive	i More

Note: When you want to download reports from your **iPad** directly to your computer, turn off **Email Reports** and use AirDrop.

Report Settings (cont.)

Generate Reports as CSV 🇨

Barkeep's default setting is for all reports to be generated as Excel spreadsheets. The reports are set-up to be read in Microsoft Excel. If you do not use Excel or are having trouble opening reports, you can generate reports as comma-separated value (CSV) files.

To switch to CSV reports, launch BarkeepApp and press Settings, General Settings. There is an option for the setting **Generate Reports as CSV** to generate reports as comma-separated value (CSV) files.

Note: CSV files are very simple text files. They do not support formatting (colors, currency, etc.). They also do not support formulas

Show HTML Reports

When you select <u>both</u> the option to **Show HTML Reports** and **Email Reports** then run a Report, the email will contain both an HTML version of the report, which is embedded in the text of the email, **b** and an attached Excel spreadsheet version of the report.

2:04 PM			1:44 PM				〒 100%
	eneral & Report Settings		Cancel	Mark	et Street Bar Detail Repor	t	
	General Settings		T	fo: manager@marketstreetbar.co	n		
Bar Name	Market Street Bar		C	Ce/Bee:			
Emai	manager@marketstreetbar.com		S	Subject: Market Street Bar Summa	y Report		
Contac	Jane Manager		T	The Market Street Bar Inventory	Summary Report is attache	d!	
Weight Format	99.9 Oz (Weight)	Edit		Market Street Bar			Ge
Keg Weight Forma	9 lbs 9 oz 1/10 oz	Edit	Ð	Summary Report			
Volume Format	9.99 Fluid Oz	Edit			ventory Type Full ventory Date May 20, 2019 09:50AM	c.	
Keg Volume Format	9.99 Fluid Oz	Edit		tem Name	Quantity	Price	Cost
Enter Case Prices		•		Seer Cider Bottled Cider Angry Orchard Cidsp Apple 12oz Total Bottled Cider Draft Cider Wyder's Draft Pear Cider 15.5gal Total Draft Cider Total Cider	18.0000 18.00 1.4000 1.40 19.40	1.0000 95.0000	18.00 18.00 133.00 133.00 151.00
Email Reports	Report Settings			Domestic Bottled Beer Amstel Light 12oz Anchor Steam Beer 12oz Bud Light 12oz Bud Light 12oz Budweiser 12oz	24.0000 8.0000 120.0000 216.0000	0.8800 1.1000 0.7500 0.7500	21.12 8.80 90.00 162.00
Generate HTML Reports			1	Michelob Ultra 12oz Miller Genuine Draft 12oz Miller Lite 12oz	138.0000 68.0000 114.0000	0.8000 0.7800 0.7800	110.40 53.04 88.92
Generate Reports as CSV		ŏ		Rolling Rock 12oz Total Domestic Bottled Beer	114.0000 802.00	0.7500	85.50 619.78
Use Default Item Price	2	ö		Domestic Draft Beer Budweiser Keg 15.5gal Miler Lite Keg 15.5gal Pabtet Blue Ribbon Keg 15.5gal Ded Medt ESP Keel 15 Seal	3.4000 0.2500 1.6400	92.0000 89.0000 75.0000	312.80 22.25 123.00 321.50
Show Item Codes	Show Pricing Details	0		Red Hook ESB Keg 15.5gal Total Domestic Draft Beer Imported Bottled Beer Becks 12oz Corona Extra 12oz	2.5516 7.84 18.0000 143.0000	126.0000 1.0479 1.1000	779.55 18.86 157.30
				Heineken 12oz Pacifico 12oz Stella Artois 12oz Total Imported Bottled Beer Premium Draft Beer	36.0000 60.0000 66.0000 323.00	1.2292 1.0208 1.2300	44.25 61.25 81.18 362.84
Cancel		Save		Fremium Draft Beer Guinness Keg 13.2gal Total Premium Draft Beer Snerialty Draft Beer	3.6890 3.69	146.0000	538.59 538.59

Note: if you select the option to **Show HTML Reports** but do <u>not</u> select **Email Reports**, Barkeep will not automatically generate an email. Instead you will see a screen with downloading/sharing options such as using AirDrop or adding the Report to iCloud. You will only see the Report in Excel spreadsheet format.

Report Settings (cont.)

Item Codes in Detail Report 🇨

This setting allows you to manage data in your Details Reports. See the **Detail Report** section for details.

Usage Report Options

These are the Report Settings that allow you to manage data in your Usage Reports:

Show Oz in Reports Show Liters in Reports Show Servings in Reports Show Retail Value Use Default Item Price Show Pricing Details

See the <u>Usage Report</u> section beginning on the next page has details on using all of these options to manage the data included in your Usage Reports.

Also see the **Pricing Items in Inventories** section for additional information about the **Use Default Item Price** setting.

Barkeep Tip: One of the easiest ways to become familiar with the Usage Report options is to simply try running the same Usage Report with different options turned on and off.

Usage Report

The main report that you will use with BarkeepApp is the Usage Report. A Usage Report tells you exactly how much product you've used between two Inventories. The Usage Report is calculated by taking the difference between your Starting Inventory and Ending Inventory and factoring in your Receiving, Return, Transfer and Waste Inventories.

The Usage Report calculates how much of each Item (e.g., Budweiser, **Absolut 1I**) you've used, subtotals usage by Category and optionally subtotals by Location.

The example below shows the first page of the Usage Report for usage between two Inventories taken on January 8th and January 15th. The Inventories contain Items from Categories including, **Domestic Bottled Beer**, **Domestic Draft Beer**, **Imported Draft Beer**, etc.

Castro Bar								BarkeepApp
Inventory Usage Report						July	/ 1, 2	019 04:03PM
Starting Inventory	J	une 24, 20	19 10:30A	м				
Ending Inventory	J	uly 1, 2019	10:30AM					
Report Locations	А	Il Location	5					
		ltem Price		Received		7		
Item Name		tem	Start	Rece	End	Used		Cost
Beer	_							
Domestic Bottled Beer								
Amstel Light 12oz	\$	0.88	60	0	36	24	\$	21.00
Anchor Steam Beer 12oz	\$	1.10	0	240	0	240	\$	264.00
Bud Light 12oz	\$	0.75	98	240	70	268	\$	201.00
Budweiser 12oz	\$	0.85	28	480	20	488	\$	414.80
Miller Genuine Draft 12oz	\$	0.78	79	192	129	142	\$	110.76
Miller Lite 12oz	\$	0.78	133	48	132	49	\$	38.22
Rolling Rock 12oz	\$	0.75	9	72	18	63	\$	47.25
Total Domestic Bottled Beer			407	1,272	405.0	1,274.0	\$	1,097.03
Domestic Draft Beer								
Budweiser Keg 15.5gal	\$	92.00	1.6	0	1.5	0.1		9.20
Miller Genuine Draft Keg 15.5gal	\$	89.00	0	2	0	2	1270	178.00
Miller Lite Keg 15.5gal	\$	89.00	1.5	60	3	58.5		5,206.50
Pabst Blue Ribbon Keg 15.5gal	\$	75.00	0	4	0	4		300.00
Total Domestic Draft Beer			3.1	66	4.5	64.6	\$	5,693.70
Imported Bottled Beer								
Becks 12oz	\$	1.05	54	0	16	38	\$	39.82
Corona Extra 12oz	\$	1.10	79	144	172	51	\$	56.10
Guinness Draught Singles 11.20 Oz Bottle 11.2oz		1.20	0	24	0	24	\$	28.80
Heineken 12oz	\$	1.23	58	96	108	46	\$	56.54
Pacifico 12oz	\$	0.96	27	12	31	8	\$	7.68

continue to next page for detailed instructions

Usage Report (cont.)

To generate a Usage Report:

- I. Go to the Main Screen and select Reports. (a)
- 2. Then select Usage Report.
- 3. This will take you to a settings screen specific for the new Usage Report.
- 4. The first step you will need to take is to press Choose C and select a Starting Inventory for your Usage Report.

10:50 AM	중 100% ■ 10:50 AM		중 100% 🔳
		Usage Report	
		Choose a Start and End Inventory for your Usage Report	
		ior your osuge report	
	Start Inventory	<none></none>	G Choose
	End Inventory	<none></none>	Choose
	Locations	All	Choose
		Report Options	
	Group by Location	Show Pricing Details	0
Usage Report	Use Default Item Price	Show Usage by Oz	0
Summary Report	Exclude Banquet Usage	Show Usage by Liter	00
Summary Report by Location	Generate Reports as CSV	Show Usage by Serving	00
Detail Report	Email Reports	Show Retail Value	00
	Generate HTML		
Items Report			
DEDODTS			
^a REPORTS			
HELP			
	Cancel	Save	Run Report

Note: You can also generate a Usage Report directly from an Inventory.

Usage Report (cont.)

- 5. After you press Choose, C you will see a list of Full Inventories. Press on the Inventory you would like to select. In this example choose the April 9th Full Inventory as the Starting Inventory.
- 6. Barkeep will return you to the screen where you now repeat the steps to press Choose, this time for an Ending Inventory.
- 7. This takes you to a list of Full Inventories that were taken <u>after</u> the April 9th Starting Inventory. The Ending Inventory can be chosen from this list. **1** Select the May 15th Inventory as the Ending Inventory.
- 8. You will now see the selected Starting and Ending Inventories. Re-press Choose if you wish to change your selections.

Note: If you are running multiple Usage Reports, be sure to double-check that you have selected the correct Starting and Ending Inventories before you press **Run Report**.

11:17 AM			10:49 AM		100%
Full Inventory 185 Items in 5 Location Value: \$5,571.92	IIsage Report s May 20, 2019 9:50 AM	ny	Cho	Usage Report ose a Start and End Inventory for your Usage Report	
Full Inventory 188 Items in 5 Location Value: \$30530	s May 15, 2019 2 11:25 AM	Choose		Inventory on 4/9/19, 9:55 AM	Choose
Full Inventory 189 Items in 5 Locatio Value: \$3,134.50	Apr 15, 2019 7:05 AM	Choose	End Inventory Full Locations All	Inventory on 5/15/19, 11:25 AM	Choose
Full Inventory 205 Items in 5 Location Value	Apr 9, 2019 9:55 AM			Report Options	
Full Inventory 191 Items in 5 Location Ust Value: \$10,745.27	s Apr 1, 2019 8:20 AM	Details O	Group by Location	Show Pricing Details Show Usage by Oz	
Exclt Full Inventory 193 Items in 5 Location Value: \$8,425,31	s Feb 18, 2019 9:55 AM	iy Liter	Exclude Banquet Usage	Show Usage by Liter) j
Genera Full Inventory 189 Items in 5 Location Value: \$3,036.66	s Jan 28, 2019 9:40 AM	ierving	Generate Reports as CSV	Show Usage by Serving Show Retail Value	ŏ
Cancel			Generate HTML)	
Cancel	Save	Run Report	Cancel	Save	8 Run Report

- 9. Once you have chosen a Starting and Ending Inventory you are ready to run a Usage Report.
- 10. When you press Run Report on the bottom toolbar, ³³ Barkeep automatically generates the report and creates an email containing both an HTML version of the report embedded in the text of the email, and an Excel spreadsheet version of the report attached to the email.
- **II.** Depending on your Report Settings, Barkeep will:
 - Create an email containing an Excel spreadsheet version (or CSV if you have selected that option) of the report attached to the email.
 - Create an email containing both an HTML version of the report embedded in the text of the email, and an Excel spreadsheet.
 - o Create an Excel spreadsheet version of the report to be downloaded/shared.
- 12. The final step is to send the email to deliver the Report or download/share options using AirDrop or iCloud.

Usage Report (cont.) Locations

By default, your Usage Report will include all your Locations. But there may be situations where you wish to focus in on a specific Location(s). When you choose a specific Location or Locations <u>only</u> those selected will be included in your Usage Report. The example below shows selections where your Usage Report will only include information from your **Store Room** and **Walk-in Cooler**. Any activity in other Locations will not be included in the Usage Report.

To choose specific Locations take the following steps before running your Usage Report:

- 1. Press Choose if you wish to filter your report by Location(s).
- 2. Press the Location(s) you wish to use for your Usage Report. D If you make a mistake, simply press the checked Location(s) to unselect it.
- 3. Press Save on the bottom toolbar 🖸 to save your changes or select to Cancel discard them.
- **4.** Now you are ready to press **Run Report** on the bottom toolbar and follow the steps on the previous page.
- 5. For additional Report Options, such as "Group by Location" continue to the next page.

:47 AM		奈 100% ■
	Usage Report	
	Choose a Start and End Inventory for your Usage Report	
Start Inventory	Full Inventory on 5/15/19, 11:25 AM	Choose
End Inventory	Full Inventory on 5/20/19, 9:50 AM	Choose
Locations	All	Choose a
	Select Locations	
	Bar 1	
Group by Location	Bar 2	
Use Default Item Price	Bar 3	
Exclude Banquet Usage	Green Lounge	
Generate Reports as CSV	Oceanview Ballroom	
Email Reports	Oceanview Veranda	
Generate HTML	Patio Lounge	
	Store Room	
	Walk-in Cooler	
	Cancel Save	
Cancel	Save	Run Report

continue to next page for additional Report Options

Usage Report (cont.) Usage Report Options

Usage Report Options

Barkeep allows you to switch on eight different options/settings that are specific for Usage Reports. All of these options are off by default. To activate any of these options:

- I. On the Usage Report screen and you will see the switch next to each option.
- 2. Switch 🚺 to the on position every option you would like to activate before you press Run Report.
- **3.** Before you press **Run Report**, you can deactivate any of the options by moving the switch to the off position.
- 4. What happens to my choices after I run a Usage Report?
 - ✓ The options you have activated will remain on for future Usage Reports.
 - ✓ You can simply turn them off the next time your run a Usage Report if you prefer.
 - ✓ Note that the choices you make will match the choices in Report Settings and vice versa.
- 5. Note: The options Generate Reports as CSV, Email Reports and Generate HTML will be applied to all the Reports you can run with Barkeep.

Report Settings

<u> </u>				<u> </u>		
10:45 AM		♥ 100% ■	10:46 AM			奈 100% ■
	Usage Report		K Barkeep	Ge	neral & Report Settings	
	Choose a Start and End Inventory for your Usage Report				General Settings	
				Bar Name	Market Street Bar	
Start Inventory	Full Inventory on 5/15/19, 11:25 AM	Choose		Email	manager@marketstreetbar.com	
End Inventory	Full Inventory on 5/20/19, 9:50 AM	Choose		Contact	Jane Manager	
Locations	All	Choose		Weight Format	99.9 Oz (Weight)	Edit
	Report Options			Keg Weight Format	99.9 Oz (Weight)	Edit
				Volume Format	9.99 Fluid Oz	Edit
Group by Location	Show Pricing Details			Keg Volume Format	9.99 Fluid Oz	Edit
Use Default Item Price	Show Usage by Oz					
Exclude Banquet Usage	Show Usage by Liter	00		Enter Case Prices	Support Banquets	
Generate Reports as CSV	Show Usage by Serving			Inventory QuickAdd		
Email Reports	Show Retail Value				Report Settings	
Generate HTML					Report Settings	
				Email Reports	Show Oz	
			Ge	nerate HTML Reports	Show Liters	\odot
			Gen	erate Reports as CSV	Show Servings	
			u	Ise Default Item Price	Show Retail Value	
				Show Item Codes	Show Pricing Details	
Cancel	Save	Run Report	Cancel			Save

Reminder: The choices you make for Usage Report options are unique to BarkeepApp on **iPad** or other **iOS** Device(s) you are using. You may select different options in BarkeepOnline, or additional Devices registered to the same account.

Usage Report Options (cont.)

Below are explanations of the different Usage Report options.

Group by Location

Usage Report data can be separated into subtotals by all Locations. You also can select a specific Location or Locations for your Usage Report.

Use Default Item Price 🧲

When calculating a Usage Report, Barkeep uses the Real Cost Report Method. That means that your cost calculations are based on what you actually paid for the Items used. Barkeep offers the option to calculate your Usage Report costs based on what we call the Default Item Price Method. This method uses the default prices you have set for each Item. Below is an explanation of each method:

Real Cost Report Method – Barkeep calculates the cost of Items that are used based on the price that you actually paid for the Items in your Inventory. Barkeep calculates this using the prices that you set for each Item in your Receiving and Return inventories.

The costs match the default Item Price unless they reflect discounts or price increases.

To calculate the cost of your liquor usage using this method, Barkeep uses a *First-In First-Out* (FIFO) algorithm, which means that Barkeep always assumes that the oldest liquor in your Inventory is used first. For example, if you received a bottle of **Absolut** for \$20 on May 7th and another bottle for \$22 on May 18th, the \$20 bottle received on May 7th will be used before the \$22 bottle received on May 18th. **Default Item Price Method** – If you switch on "Use Default Item Price," Barkeep will calculate your Usage Report costs based on the default prices you have set for each Item.

The default Item Price will be used for each Item in your Usage Report even when you have paid a different price for any Items. For example, if you were conducting a Receiving Inventory after a Supplier delivery and your Supplier charged you \$22 per bottle instead of the default Item Price of \$20. The Usage Report will base the calculations on the \$20 price when you switch on "Use Default Item Price." Also see the <u>Pricing Items in Inventories</u> section for overriding the default Item Price in a Receiving Inventory.

Show Pricing Details

When you select to **Show Pricing Details** your Usage Report will have additional information for each Item that goes beyond the Item Price and Cost. Your Usage Report will include starting, received and end prices, values and costs. This is useful when you want to see very detailed cost information and perhaps narrow in on a cost problem. The Usage Report will also highlight Items where the receiving price was different due to price changes, increases and/or vendor discounts.

Exclude Banquet Usage

This option allows you to exclude banquet usage from your Usage Report. For instructions for using Barkeep's Banquet feature see the **Banquet User Guide**.

Usage Report Options (cont.)

Show Usage by Oz 🌔

A Usage Report will show you the number of bottles and other containers you have used for each Item. When you select to **Show Usage by Oz** you will have an additional column of data that will show the total ounces of each Item used. For example, if you used 4.5 one-liter bottles of **Jack Daniels** you will also see that you used 151.5 ounces.

Show Usage by Liter 🌔

When you select to **Show Usage by Liter** you will have an additional column of data that will show the total ounces of each Item used. For example, if you used 4.5 one-liter bottles of **Jack Daniels** you will also see that you used 4.5 liters.

Below is the Item **Jack Daniels** with some examples of how the specific Item Details you enter will be factored into a Usage Report when you select the following options.

Show Usage by Servings 🌔

When you select to **Show Usage by Servings** you will have an additional column of data that will show the total number servings of each Item used. For example, if you used 4.5 one-liter bottles of **Jack Daniels** you will also see that you used 76 servings based on a Serving Size of 2 oz. 1 that you set for the Item **Jack Daniels**. If you have not set a serving size for an Item, the servings will display **0**.

Show Retail Value 🌔

When you select to **Show Retail Value** you will have an additional column of data that will show the total retail value of each Item used. For example, if you used 4.5 one-liter bottles of **Jack Daniels** you will also see that the retail value is \$494.00 servings based on a Retail Value of \$6.50 per serving. It is the Serving Price amount that you set for the Item **Jack Daniels**. If you have not set a Serving Price for an Item, the Retail Value will be empty in the Usage Report.

		Item	Details		
*Name	Jack Daniels		Supplier	Acme Liquor	EDIT
*Category	Call Whiskey	EDIT	Serving Size		a 2.00
*Size		1	Serving Units	ml oz	count
*Units	ml liter	oz gal count	Serving Price		\$6.50
*Container	Bottle	EDIT	Empty Wt		18.30 02
Case Count		12	Full Wt		51.80 oz
Price		\$26.75	Item Code		Item Code
			Inactive?		0
		Add New Barco	ode		
1	Barcodes				
Cancel	勈	Co	DV	30	Save

The **BarkeepOnline User Guide** has additional details about the use of Serving Sizes and Serving Prices.

Generate Reports as CSV 🌔 Email Reports 🌔 and Generate HTML 🌔

When you select to turn these options on or off it will also be the optional setting for all your reports. You can also manage these options under Report Settings. See the **Report Settings** section for more details.

Barkeep Tip: One of the easiest ways to become familiar with the Usage Report options is to simply try running the same Usage Report with different options turned on and off.

Usage Reports directly from the Inventory¹²

If you have just completed an Inventory (or are reviewing the Inventory in the Inventory screen) and want to generate the Usage Report immediately, do the following steps:

- I. Select the Action $\stackrel{(1)}{=}$ icon $\stackrel{(2)}{=}$ on the left-hand side of the bottom toolbar.
- 2. Choose Usage Report. (b) from the action menu.
- **3.** This will take you to a settings screen specific for this Usage Report. The Inventory that you are creating a Usage Report from will automatically be your Ending Inventory. Note that this Inventory already appears as the selection for the Ending Inventory.
- 4. The next step you will need to take is to press Choose C and select a Starting Inventory for your Usage Report.
- 5. Next you can choose any of the Report Options 🥝 explained on the previous pages.
- 6. When you press Run Report (2) on the bottom toolbar, Barkeep automatically generates the report and creates an email containing both an HTML version of the report embedded in the text of the email, and an Excel spreadsheet version of the report attached to the email.
- 7. The final step is to send the email to deliver the report.

10:48 AM		🗢 100% 🛲	10:48 AM		🗢 100% 🔳
	Full Inventory May 20, 2019 185 Items Value: \$5,571.92			Usage Report Choose a Start and End Inventory for your Usage Report	
Bar 1: 73 Items					
Absolut 1 Liter Bottles		1 Bottles \$25.50	Start Inventory	<none></none>	Choose
Absolut Mandarin Vodka 1 Liter Bottles		0.8 Bottles \$19.20	End Inventory	Full Inventory on 5/20/19, 9:50 AM	Choose
Absolut Vanilla Vodka 1 Liter Bottles		0.2 Bottles \$4.80	Locations	All	Choose
Amstel Light 12 oz Bottles		12 Bottles \$10.56		Report Options	Q
Anchor Steam Beer 12 oz Bottles		8 Bottles \$8.80	Group by Location	Show Pricing Details	1
Angry Orchard Crisp Apple 12 oz Bottles		12 Bottles \$12.00	Use Default Item Price	Show Usage by Oz	
Arrow Creme de Menthe		1 Bottles \$9.00	Exclude Banquet Usage	Show Usage by Uz	× ·
Bacardi 151 1 Liter Bottles		0.16 Bottles \$3.35	Generate Reports as CSV	Show Usage by Serving	Sec. 1
Bacardi Gold		1 Bottles \$32.50	Email Reports	Show Retail Value	
Bailey's Irish Cream		0.53 Bottles \$11.40	Generate HTML	Show Retail Value	<u>U</u>
Barton California Brandy		1 Bottles \$7.90	Generale HTML		
Barton Gold Rum		1 Bottles \$5.00			
Barton Reserve Whiskey	Summary Report	2 Bottles \$12.16			
Barton Triple Sec	Summary Report by Location	0.84 Bottles \$4.20			
Barton Vodka 1 Liter Bottles	Date II Demost	2 Bottles \$10.00			
Becks 12 oz Bottles	Detail Report	12 Bottles \$12.57			
Beefeater Dry Gin	Usage Report	0.58 Bottles \$12.39			
Bogle Pinot Noir 750 ml Bottles	Repeat Inventory	1 Bottles \$7.00			
Bomb Gin		0.4 Bottles			0
1 ¹	Sort Edit	+ Done	Cancel	Save	Run Report

Usage Reports and Pour Cost

The Usage Report is useful in determining your Pour Cost. Pour Cost is determined by dividing the cost of all liquor used (totals from your Usage Report) by your sales over the same period.

You can calculate your Pour Cost manually using the Usage Report to determine your liquor costs. Or you can subscribe to BarkeepOnline to receive complete Pour Cost Analysis, Sales Tracking, and Order Management. If you subscribe to BarkeepOnline, all of your Inventory data from BarkeepApp will automatically be uploaded to BarkeepOnline for analysis.

¹² We recommend running a Usage Report after every Full Inventory. It is one of the best ways to spot possible errors.

Negative Usage

Spotting Negative Usage and Price Increases in your Usage Reports

Negative usage will only occur if there is an error somewhere in your data. When you run and download your Usage Reports as an Excel spreadsheet, some figures may be in red.

Negative usage is shown in red like in the example below. In this example, the end count has more bottles of **Becks** on January 15th than the start count on January 8th. When this happens, review the two Inventories. Were bottles undercounted on January 8th or was there a mistake on January 15th? Or, perhaps you received **Becks** but did not add the Item to a Receiving Inventory.

Market Street Bar							by BarkeepApp
Inventory Usage Report						January 2	9, 2018 06:50PN
Starting Inventory	J	January 8, 3	2018 08:25A	M			
Ending Inventory		lonuoni 15	2018 08:15				
Ending Inventory		lanuary 15,	2010 00.10				
Report Locations	A	All Location	s				
		Item Price		Received		_	
Item Name		Item	Start	Rece	End	Used	Cost
Beer	_						
Domestic Bottled Beer							
Amstel Light 12oz	\$	0.88	60	0	36	24 \$	21.00
Anchor Steam Beer 12oz	\$	1.10	24	240	38	226 \$	248.60
Bud Light 12oz	\$	0.75	98	240	118	220 \$	165.00
Budweiser 12oz	\$	0.85	28	480	68	440 \$	374.00
Miller Genuine Draft 12oz	\$	0.78	79	192	129	142 \$	110.76
Miller Lite 12oz	\$	0.78	133	48	132	49 \$	38.22
Rolling Rock 12oz	\$	0.75	9	72	18	63 \$	47.25
Total Domestic Bottled Beer			431	1,272	539.0	1,164.0 \$	1,004.83
Domestic Draft Beer							
Budweiser Keg 15.5gal	\$	92.00	1.6	0	1.5	0.1 \$	9.20
Miller Genuine Draft Keg 15.5gal	\$	89.00	0.8	2	0.9	2.0 \$	
Miller Lite Keg 15.5gal	\$	89.00	1.5	5	3	3.5 \$	311.50
Pabst Blue Ribbon Keg 15.5gal	\$	75.00	0	4	3.8	0.2 \$	
Total Domestic Draft Beer			3.9	11	9.2	5.8 \$	509.25
Imported Bottled Beer							
Becks 12oz	\$	1.05	54	0	136	C-82 \$	
Corona Extra 12oz	\$	1.10	79	144	172	51 \$	56.10
Guinness Draught Singles 11.20 Oz Bottle 11.2oz	\$	1.20	0	24	5	19 \$	22.80
Heineken 12oz	\$	1.23	58	96	108	46 \$	56.54
Pacifico 12oz	\$	0.96	27	12	31	8 \$	7.68
Stella Artois 12oz	\$	1.23	20	24	22	22 \$	27.06
Total Imported Bottled Beer			238	300	474.0	64.0 \$	84.25

Also see the **BarkeepOnline User Guide** for further information as well as the **Support Section** of **barkeepapp.com** also features Troubleshooting Documents on:

- Negative Usage
- Price Increases

Negative Usage (cont.)

Do Empties affect Negative Usage?

No. Empties do not affect Usage. The Empties count (if you track Empties) allows you to compare Usage for a particular Location against the Empties that were removed from the Location. In general, the difference between the Usage for a particular Location and the Empties for that Location should be somewhere between -1 to +1 bottles. If the difference between the Usage and Empties for a particular Location is greater than one bottle, then you have used more liquor than can be accounted for by the Empties that were counted at the end of the night. This may indicate that a bottle of liquor has disappeared.

Some users choose to track Empties, and some users choose not to. Tracking Empties does not affect your Usage Reports and will not affect your Pour Cost. However, it can be a useful piece of information in helping you to track down problems. If you routinely find discrepancies between your Usage Report and empties, then either your staff isn't tracking empties consistently or bottles of liquor are disappearing before they can be tracked.

Also see **Empties Inventory** section for further details.

Summary Report

The Summary Report shows the total amount of each type of product (Items) that is included in a single Inventory.

If you've entered an Item into an Inventory multiple times, potentially in different Locations, the Summary Report will add together all of the quantities and include only the total in the Summary Report.

The sample Summary Report¹³ shows the summary of all Items included in the January 15th Full Inventory.

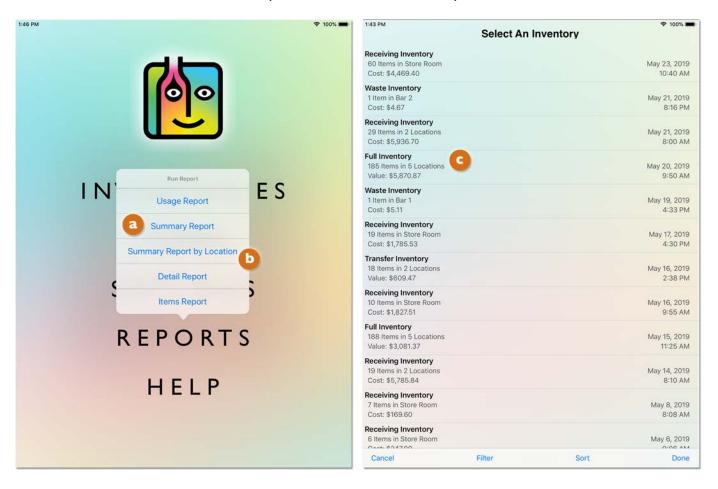
Castro Bar				Generated I	-	arkeepApp 19 03:49PM
Summary Report				July 2	, 20	19 03.49 10
Inventory Type	Full					
Inventory Date	July 1, 2019 10:30	AM				
Item Name	Quantity	Oz		Price		Cost
Beer						
Beer (non-alcoholic)						
Clausthaler N-A 12oz	5	60	\$	0.90	\$	4.50
Total Beer (non-alcoholic)	5.0	60.0			\$	4.50
Cider						
Bottled Cider						
Wyder's Pear Cider 12oz	9	108	\$	2.85	\$	25.65
Total Bottled Cider	9.0	108.0			\$	25.65
Total Cider	9.0	108.0			\$	25.65
Domestic Bottled Beer						
Amstel Light 12oz	24	288	\$	0.88	\$	21.00
Anchor Steam Beer 12oz	19	228		1.10	\$	20.90
Bud Light 12oz	38	456		0.75	\$	28.50
Budweiser 12oz	72	864	· ·	0.75	\$	54.00
Michelob Ultra 12oz	5	60		0.80	\$	4.00
Miller Lite 12oz	24	288		0.78	\$	18.72
Rolling Rock 12oz	24	288	· ·	0.75	\$	18.00
Sierra Nevada Big Foot Ale Singles 12oz	16	192	\$	98.00	\$	1,568.00
Total Domestic Bottled Beer	222.0	2,664.0			\$	1,733.12
Domestic Draft Beer						
Budweiser Keg 15.5gal	1	1984		95.00	\$	95.00
Miller Genuine Draft Keg 15.5gal	0.4	793.6	1957	89.00	\$	35.60
Miller Lite Keg 15.5gal	1	1984		89.00	\$	89.00
Pabst Blue Ribbon Keg 15.5gal	0.6	1,190.4		75.00	\$	45.00
Sierra Nevada Keg 15.5gal	0.6	1,190.4	\$	185.00	\$	111.00
Total Domestic Draft Beer	3.6	7,142.4			\$	375.60
Imported Bottled Beer	2101	1200000		1.200.000		1212/00/00
Corona Extra 12oz	24	288	\$	1.10	\$	26.40
Heineken 12oz	21	252		1.24	\$	25.99
Pacifico 12oz	26	312	100	1.02	\$	26.54
Stella Artois 12oz	36	432	\$	1.23	\$	44.28
Total Imported Bottled Beer	107.0	1.284.0			\$	123.21

¹³ Please note – the actual Summary Report will be about 2-3 pages long.

Summary Report (cont.)

To create a Summary Report, do the following steps:

- I. Go to the Main Screen and select Reports. Then select Summary Report.
- 2. Or, if you prefer a Summary Report separated into subtotals by all Locations, the select Summary Report by Location.
- 3. You are presented with a list of Inventories to choose from. Choose the Inventory that you would like to run a Summary Report on. C In this example, choose the May 20th Full Inventory.
- **4.** BarkeepApp will run the report and create an email with an HTML version of the report included in the text of the email and an Excel Spreadsheet version of the report attached to the email.



Summary Report (cont.)

5. Press Send to email the report.

		\$	100%	1:43 PM	₹ 100%I
cel	Market Street Bar Detail Rep	ort 🖸	Send	Select An Inve	ntory
		-		Receiving Inventory	
To: manager@mai	rketstreetbar.com			60 Items in Store Room	May 23, 201
				Cost: \$4,469.40	10:40 AM
Cc/Bcc:					10140 /
			- 1	Waste Inventory	
Subject: Market Str	eet Bar Summary Report			1 Item in Bar 2	May 21, 201
				Cost: \$4.67	8:16 P!
The Market Stree	t Bar Inventory Summary Report is attach	ned!		Receiving Inventory	
			Section and	29 Items in 2 Locations	May 21, 201
Market Street Bar			Generate May	Cost: \$5,936.70	8:00 AI
Summary Report			may	Full Inventory	
	and the second				No. 00.000
	Inventory Type Full			185 Items in 5 Locations	May 20, 201
	Inventory Date May 20, 2019 09:50.	AM		Value: \$5,870.87	9:50 AI
5.000 and 1000 and 10				Waste Inventory	
Item Name	Quantity	Price Cost		1 Item in Bar 1	May 19, 201
Beer Cider				Cost: \$5.11	4:33 P
Bottled Cider					
Angry Orchard Crisp	Apple 12oz 18.0000	1.0000 18.00		Receiving Inventory	
Total Bottled Cider	18.00	18.00		19 Items in Store Room	May 17, 201
Draft Cider				Cost: \$1,785.53	4:30 P
Wyder's Draft Pear C	ider 15.5gal 1.4000	95.0000 133.00		CUSI: \$1,705.55	4-30 FI
Total Draft Cider	1.40	133.00		Transfer Inventory	
Total Cider	19.40	151.00		18 Items in 2 Locations	May 16, 201
Domestic Bottled Bee					
Amstel Light 12oz	24.0000	0.8800 21.12		Value: \$609.47	2:38 P
Anchor Steam Beer 1		1.1000 8.80		Describing Inventory	
Bud Light 12oz	120.0000	0.7500 90.00		Receiving Inventory	1000 - 1000 - 1000 - 1000 - 1000 - 1000
Budweiser 12oz	216.0000	0.7500 162.00		10 Items in Store Room	May 16, 201
Michelob Ultra 12oz Miller Genuine Draft 1	138.0000 2oz 68.0000	0.8000 110.40 0.7800 53.04		Cost: \$1,827.51	9:55 A
Miller Lite 12oz	202 68.0000	0.7800 53.04			
Rolling Rock 12oz	114.0000	0.7500 85.50		Full Inventory	
Total Domestic Bottled		619.78		188 Items in 5 Locations	May 15, 201
Domestic Draft Beer				Value: \$3,081.37	11:25 A
Budweiser Keg 15.5g	al 3.4000	92.0000 312.80		Construction of the second sec	11.2011
Miller Lite Keg 15.5ga	0.2500	89.0000 22.25		Receiving Inventory	
Pabst Blue Ribbon Ke		75.0000 123.00		19 Items in 2 Locations	May 14, 201
Red Hook ESB Keg 1		126.0000 321.50		Cost: \$5,785	in the second
Total Domestic Draft B		779.55		Filter Inventories	Sort Inventories
Imported Bottled Bee		120220 12242		Receiving In	
Becks 12oz	18.0000	1.0479 18.86			First to Last
Corona Extra 12oz Heineken 12oz	143.0000 36.0000	1.1000 157.30 1.2292 44.25		rinde Old inventories	
Pacifico 12oz	60.0000	1.2292 44.25		Cost: \$169.6	A
Stella Artois 12oz	60.0000	1.0208 61.25		Description In	1 10 10 10 10 10 10 10 10 10 10 10 10 10
Total Imported Bottled		1.2300 61.16 362.84		Receiving In Show Banquet Inventories	Last to First
Premium Draft Beer	010.00	302.04		6 Items in St	ال
Guinness Keg 13.2ga	3,6890	146.0000 538.59		Cost \$24700	0.06 1
Total Premium Draft Be		538.59		Cancel	Sort Don
Specialty Draft Beer					Don

Note: When selecting an Inventory, you can first choose to Filter **1** the Inventories list if you want to select an older Inventory and/or a Banquet Inventory and you can also Sort **1** the order of the list.

Summary Report (cont.) Directly from the Inventory

Alternatively, if you have just completed an Inventory (or are reviewing the Inventory in the Inventory screen) and want to generate the Summary Report immediately, do the following steps:

- **I.** Select the Action (1) icon (2) on the left-hand side of the bottom toolbar.
- 2. Choose **b** Summary Report from the action menu.
- 3. Or, if you prefer a Summary Report separated into subtotals by all Locations, the select Summary Report by Location.
- 4. This automatically generates the Summary Report and creates an email containing both an HTML version of the report embedded in the text of the email, and an Excel spreadsheet version of the report attached to the email.
- 5. Press Send to email the report.

1:52 PM		🗢 99% 🛲)	1:44 PM			~	100%
	Full Inventory May 20, 2019 185 Items		Cancel M	arket Street Bar Detail Report		d	
	Value: \$5,870.87		To: manager@marketstreetbar	com			
Bar 1: 73 Items			Cc/Bcc:				
Absolut		1 Bottles \$25.50	Subject: Market Street Bar Sum	mary Report			
Absolut Mandarin Vodka 1 Liter Bottles		0.8 Bottles \$19.20	The Market Street Bar Invent	ory Summary Report is attached!			
Absolut Vanilla Vodka 1 Liter Bottles		0.2 Bottles \$4.80	Market Street Bar				Genera M
Amstel Light 12 oz Bottles		12 Bottles \$10.56	Summary Report	Inventory Type Full			
Anchor Steam Beer 12 oz Bottles		8 Bottles \$8.80		Inventory Date May 20, 2019 09:50AM			
Angry Orchard Crisp Apple		12 Bottles \$12.00	Item Name Beer	Quantity	Price	Cost	
Arrow Creme de Menthe		1 Bottles \$9.00	Gider Bottled Cider				
Bacardi 151		0.16 Bottles \$3.35	Angry Orchard Crisp Apple 12oz Total Bottled Cider Draft Cider	18.0000 18.00	1.0000	18.00 18.00	
Bacardi Gold		1 Bottles \$32.50	Wyder's Draft Pear Cider 15.5gal Total Draft Cider	1.4000 1.40	95.0000	133.00 133.00	
Bailey's Irish Cream		0.53 Bottles \$11.40	Total Cider Domestic Bottled Beer Amstel Light 12oz	19.40	0.8800	151.00 21.12	
Barton California Brandy		1 Bottles \$7.90	Anchor Steam Beer 12oz Bud Light 12oz Budweiser 12oz	8.0000 120.0000 216.0000	1.1000 0.7500 0.7500	8.80 90.00 162.00	
Barton Gold Rum		1 Bottles \$5.00	Michelob Ultra 12oz Miller Genuine Draft 12oz	138.0000 68.0000	0.8000 0.7800	110.40 53.04	
Barton Reserve Whiskey	Summary Report	2 Bottles \$12.16	Miller Lite 12oz Rolling Rock 12oz Total Domestic Bottled Beer	114.0000 114.0000 802.00	0.7800 0.7500	88.92 85.50 619.78	
Barton Triple Sec	Summary Report by Location	0.84 Bottles \$4.20	Domestic Draft Beer Budweiser Keg 15.5gal	3.4000	92.0000	312.80	
Barton Vodka 1 Liter Bottles	9	2 Bottles \$10.00	Miller Lite Keg 15.5gal Pabst Blue Ribbon Keg 15.5gal Red Hook ESB Keg 15.5gal	0.2500 1.6400 2.5516	89.0000 75.0000 126.0000	22.25 123.00 321.50	
Becks 12 oz Bottles	Detail Report	12 Bottles \$12.57	Total Domestic Draft Beer Imported Bottled Beer	7.84	1.0470	779.55	
Beefeater Dry Gin	Usage Report	0.58 Bottles \$12.39	Becks 12oz Corona Extra 12oz Heineken 12oz	18.0000 143.0000 36.0000	1.0479 1.1000 1.2292	18.86 157.30 44.25	
Bogle Pinot Noir	Repeat Inventory	1 Bottles \$7.00	Pacifico 12oz Stella Artois 12oz Total Imported Bottled Beer	60.0000 66.0000 323.00	1.0208 1.2300	61.25 81.18 362.84	
Bomb gry Gin		0.4 Bottles	Premium Draft Beer Guinness Keg 13.2gal	3.6890	146.0000	538.59	
û 👻 û	Sort Edit	+ Done	Total Premium Draft Beer Specialty Draft Beer	3.69		538.59	

Detail Report

The Detail Report contains a line for each time that an Item was added to an Inventory. For example, if you've added an Item (e.g. **Bud Light**) to an Inventory multiple times, there will be multiple lines in the report for each time that the Item was added to the Inventory. Items are not subtotaled for you. This gives you a report with the "raw data" for a given Inventory, which you can review to suit your needs.

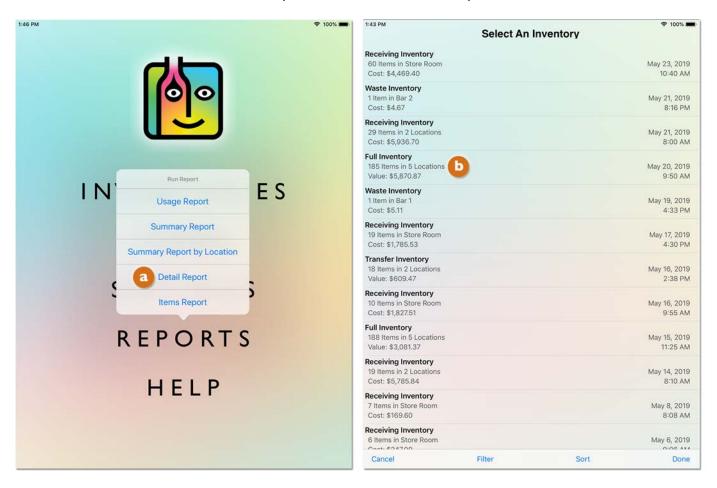
The sample shows the beginning of a multi-page Detail Report with the data from a January 15th Full Inventory.

Embarcadero Club Generated by BarkeepApp July 28, 2019 03:46PM Detail Report								
Inventory Type	Full							
Inventory Dete	WW 22, 2010 11:50AM							
Inventory Date	July 22, 2019 11:59AM	Catanami	Quantity Units					
Location Walk-in Cooler	Item Name	Category Domestic Bottled Beer	Quantity Units 1 Case of 24					
Walk-in Cooler <i>C</i>	Amstel Light 12oz Bud Light 12oz	Domestic Bottled Beer	2 Cases of 24					
Walk-in Cooler	Miller Genuine Draft 12oz	Domestic Bottled Beer	4 Cases of 24					
Walk-in Cooler	Miller Lite 12oz	Domestic Bottled Beer	5 Cases of 24					
		Domestic Draft Beer						
Walk-in Cooler Walk-in Cooler	Budweiser Keg 15.5gal	Domestic Draft Beer	1 Kegs					
Walk-in Cooler	Miller Lite Keg 15.5gal Corona Extra 12oz		2 Kegs 6 Cases of 24					
Walk-in Cooler	Heineken 12oz	Imported Bottled Beer	4 Cases of 24					
Walk-in Cooler		Imported Bottled Beer Premium Draft Beer						
Stock Room	Guinness Keg 13.2gal		2 Kegs 10 Bottles					
Stock Room	Beefeater Dry Gin 1L	Call Liquor	5 Bottles					
Stock Room	Bailey's Irish Cream 1L Bombay Dry Gin 1L	Call Liquor Call Liquor	6 Bottles					
Stock Room	Captain Morgan Spiced Rum 1L		5 Bottles					
Stock Room	Dubonnet Red 1L	Call Liquor	5 Bottles					
Stock Room	Dubonnet White 1L	Call Liquor	8 Bottles					
Stock Room	J & B Scotch 1L	Call Liquor	8 Bottles					
Stock Room	Jack Daniels 1L		1 Case of 12					
Stock Room	Jagermeister 1L	Call Liquor Call Liquor	1 Case of 12					
Stock Room	Kahlua 1L	Call Liquor	1 Case of 12					
Stock Room	Myers Dark Rum 1L	Call Liquor	8 Bottles					
Stock Room	Seagram's 7 Crown 1L	Call Liquor	9 Bottles					
Stock Room	Smirnoff Vodka 1L	Well Liquor	10 Bottles					
Stock Room	Southern Comfort 1L	Call Liquor	11 Bottles					
Stock Room	Wild Turkey 101 1L	Call Liquor	10 Bottles					
Stock Room	Grey Goose Vodka 750ml	Call Vodka	8 Bottles					
Bar 2	Johnnie Walker Black 1L	Premium Liquor	9 Bottles					
Stock Room	Red Bull 250ml	Non-Alcoholic	3 Cases of 24					
Stock Room	Red Bull Sugar Free 250ml	Non-Alcoholic	5 Cases of 24					
Bar 1	Amstel Light 12oz	Domestic Bottled Beer	12 Bottles					
Bar 1 C	Bud Light 12oz	Domestic Bottled Beer	20 Bottles					
Bar 1	Budweiser 12oz	Domestic Bottled Beer	14 Bottles					
Bar 1	Miller Genuine Draft 12oz	Domestic Bottled Beer	16 Bottles					
Bar 1	Rolling Rock 12oz	Domestic Bottled Beer	18 Bottles					
Bar 1	Miller Lite 12oz	Domestic Bottled Beer	12 Bottles					

Detail Report (cont.)

To generate a Detail Report, do the following steps:

- I. Select Detail Report from the Reports screen.
- 2. This will show you a list of your existing Inventories.
- **3.** Choose the Inventory that you would like to generate a report for, in this example **b** choose the May 20th Full Inventory.
- 4. BarkeepApp will run the report and automatically create an email with an HTML version of the report embedded in the email and an Excel spreadsheet version of the report attached to the email.



Detail Report (cont.)

5. Press Send to email the report.

			-	≈ 100% -	1:43 PM Select An Inve	€ 100%	
cel	Market Street Bar De	etail Report		C Send			
2	2 827 22				Receiving Inventory		
To: manager@marketstreetbar.com					60 Items in Store Room	May 23, 20	
0+10++					Cost: \$4,469.40		
Cc/Bcc:					Waste Inventory		
					1 Item in Bar 2	May 21, 20	
Subject: Market Street Bar Detail Report				Cost: \$4.67			
The Marlesh (- March and I				8:16 F	
The Market s	Street Bar Inventory Detail Report is	attached:			Receiving Inventory		
Market Street	Bar			Generated	29 Items in 2 Locations	May 21, 20	
				May 2	Cost: \$5,936.70	8:00 /	
Detail Report					Full Inventory		
					185 Items in 5 Locations	May 20, 20	
Inventory Type Full				Value: \$5,870.87	9:50		
Invent	ory Date May 20, 2019 09:50AM				Value: \$5,670.67	9.007	
					Waste Inventory		
Location Bar 1	Item Name Absolut 1L	Category Call Vodka	Quantity	Units Bottles	1 Item in Bar 1	May 19, 20	
Bar 1	Absolut Mandarin Vodka 1L	Call Vodka	0.8	Bottles	Cost: \$5.11	4:33	
Bar 1	Absolut Vanilla Vodka 1L	Call Vodka	0.2	Bottles			
Bar 1	Brennan's Irish Whiskey 1L	Call Whiskey	0.25	Bottles	Receiving Inventory		
Bar 1	Canadian Club 6 Yr 1L	Call Whiskey	0.5	Bottles	19 Items in Store Room	May 17, 20	
Bar 1	Jack Daniels 1L	Call Whiskey	1	Bottles	Cost: \$1,785.53		
Bar 1	Jameson 1L	Call Whiskey	0.5	Bottles		4:30 F	
Bar 1	Seagram's 7 Crown 1L	Call Whiskey	0.3	Bottles	Transfer Inventory		
Bar 1	Southern Comfort 1L	Call Whiskey	0.25	Bottles	18 Items in 2 Locations	May 16, 20	
Bar 1 Bar 1	Bacardi 151 1L Bacardi Gold 1.5L	Call Rum Call Rum	0.16	Bottles	Value: \$609.47	2:381	
Bar 1	Captain Morgan Spiced Rum 1L	Call Rum	0.6	Bottles	Value: 0005.47	2.001	
Bar 1	Myers Dark Rum 1L	Call Rum	1	Bottles	Receiving Inventory		
Bar 1	Malibu Caribbean Rum 1L	Call Rum	0.8	Bottles	10 Items in Store Room	May 16, 20	
Bar 2	Beefeater Dry Gin 1L	Call Gin	0.2	Bottles	Cost: \$1.827.51	9:55	
Bar 1	Bombay Dry Gin 1L	Call Gin	0.4	Bottles	0050.01,027.01	9.00 /	
Bar 1	Tanqueray Gin 1L	Call Gin	1	Bottles	Full Inventory		
Bar 1	Campari 1L	Aperitif	0.35	Bottles	188 Items in 5 Locations	May 15, 20	
Bar 1	Cinzano Extra Dry 1L	Aperitif	1	Bottles			
Bar 1 Bar 1	Cinzano Rosso 1L Bailey's Irish Cream 1L	Aperitif Call Liquor	1.25	Bottles	Value: \$3,081.37	11:25 /	
Bar 1	Bushmil's 1L	Call Liquor	0.53	Bottles	Receiving Inventory		
Bar 1	Cuervo Gold 1L	Call Liquor	0.1	Bottles	19 Items in 2 Locations	May 14, 20	
Bar 1	Jagermeister 1L	Call Liquor	1.5	Bottles			
Bar 1	Jim Beam 1L	Call Liquor	0.7	Bottles	Cost: \$5,785 Filter Inventories	Sort Inventories	
Bar 1	Kahlua 1L	Call Liquor	0.4	Bottles	Receiving In		
Bar 1	Jose Cuervo 1800 750ml	Call Liquor	0.5	Bottles		First to Last	
Bar 1	Midori 1L Secondary VO 11	Call Liquor	0.2	Bottles	7 Items in Ste Hide Old Inventories	THOLEO LUOT	
Bar 1 Bar 1	Seagrams VO 1L Wild Turkey 101 1L	Call Liquor Call Liquor	0.65	Bottles	Cost: \$169.6		
Bar 1	Arrow Creme de Menthe 1L	Well Liquor	1	Bottles	Paceiving In all a second	Louise Fluis	
Bar 1	Barton California Brandy 1L	Well Liquor	1	Bottles	Receiving In Show Banquet Inventories	Last to First	
Bar 1	Barton Gold Rum 1L	Well Liquor	1	Bottles	6 Items in St		
Bar 1	Barton Reserve Whiskey 1L	Well Liquor	2	Bottles	Cost \$24700 C	(e)	
Bar 1	Barton Triple Sec 1L	Well Liquor	0.84	Bottles	Cancel	Sort Do	
Bar 1	DeKuyper Peachtree 1L	Well Liquor	0.69	Bottles			

Note: When selecting an Inventory, you can first choose to Filter **1** the Inventories list if you want to select an older Inventory and/or a Banquet Inventory and you can also Sort **1** the order of the list.

Detail Report (cont.)

Directly from the Inventory

Alternatively, if you have just completed an Inventory (or are reviewing the Inventory in the Inventory screen) and want to generate the Detail Report immediately, do the following steps:

- **I.** Select the action (1) icon (a) on the left-hand side of the bottom toolbar.
- 2. Choose Detail Report from the action menu.
- **3.** This automatically generates the Detail Report and creates an email containing both an HTML version of the report embedded in the text of the email, and an Excel spreadsheet version of the report attached to the email.
- 4. Press Send to email the report.

1:52 PM		🗢 99% 🛲-	1:44 PM				≈ 100% 💻	
Full Inventory May 20, 2019 185 Items			Cancel	Market Street Bar De	etail Report		C Send	
	Value: \$5,870.87	To: manager@m	arketstreetbar.com					
Bar 1: 73 Items			Cc/Bcc:					
Absolut 1 Liter Bottles		1 Bottles \$25.50	Subject: Market S	itreet Bar Detail Report				
Absolut Mandarin Vodka 1 Liter Bottles		The Market Street Bar Inventory Detail Report is attached!						
1 Liter Bottles \$19.20 Absolut Vanilla Vodka 0.2 Bottles 1 Liter Bottles \$4.80			Market Street Bar Gene					
Amstel Light 12 oz Bottles		12 Bottles \$10,56	Detail Report					
Anchor Steam Beer		8 Bottles	Inventory 1	Type Full Date May 20, 2019 09:50AM				
Angry Orchard Crisp Apple		12 Bottles \$12.00	Location	Item Name	Category	Quantity		
Arrow Creme de Menthe		1 Bottles \$9.00	Bar 1 Bar 1 Bar 1	Absolut 1L Absolut Mandarin Vodka 1L Absolut Vanilla Vodka 1L	Call Vodka Call Vodka Call Vodka	1 0.8 0.2	Bottles Bottles Bottles	
Bacardi 151 1 Liter Bottles		0.16 Bottles \$3.35	Bar 1 Bar 1	Brennan's Irish Whiskey 1L Canadian Club 6 Yr 1L	Call Whiskey Call Whiskey	0.25 0.5	Bottles Bottles	
Bacardi Gold		1 Bottles	Bar 1 Bar 1 Bar 1	Jack Daniels 1L Jameson 1L Seagram's 7 Crown 1L	Call Whiskey Call Whiskey Call Whiskey	1 0.5 0.3	Bottles Bottles Bottles	
Bailey's Irish Cream		\$32.50 0.53 Bottles	Bar 1 Bar 1	Southern Comfort 1L Bacardi 151 1L	Call Whiskey Call Rum	0.25 0.16	Bottles Bottles	
1 Liter Bottles Barton California Brandy		\$11.40 1 Bottles	Bar 1 Bar 1	Bacardi Gold 1.5L Captain Morgan Spiced Rum 1L	Call Rum Call Rum	1 0.6	Bottles Bottles	
1 Liter Bottles		\$7.90	Bar 1 Bar 1	Myers Dark Rum 1L Malibu Caribbean Rum 1L	Call Rum Call Rum	1 0.8	Bottles	
Barton Gold Rum		1 Bottles \$5.00	Bar 2 Bar 1	Beefeater Dry Gin 1L Bombay Dry Gin 1L	Call Gin Call Gin	0.2	Bottles Bottles	
Barton Reserve Whiskey	Summary Report	2 Bottles \$12.16	Bar 1 Bar 1	Tanqueray Gin 1L Campari 1L	Call Gin Aperitif	1 0.35	Bottles Bottles	
Barton Triple Sec	Summary Report by Location	0.84 Bottles \$4.20	Bar 1 Bar 1 Bar 1	Cinzano Extra Dry 1L Cinzano Rosso 1L Bailey's Irish Cream 1L	Aperitif Aperitif Call Liquor	1 1.25 0.53	Bottles Bottles Bottles	
Barton Vodka		2 Bottles	Bar 1 Bar 1	Bushmill's 1L Cuervo Gold 1L	Call Liquor Call Liquor	0.53 0.1	Bottles Bottles	
Becks	Detail Report	\$10.00 12 Bottles	Bar 1 Bar 1 Bar 1	Jagermeister 1L Jim Beam 1L Kählua 1L	Call Liquor Call Liquor Call Liquor	1.5 0.7 0.4	Bottles Bottles Bottles	
12 oz Bottles Beefeater Dry Gin	Usage Report	\$12.57 0.58 Bottles	Bar 1 Bar 1 Bar 1	Jose Cuervo 1800 750ml Midori 1L Seagrams VO 1L	Call Liquor Call Liquor Call Liquor	0.5 0.2 0.65	Bottles Bottles Bottles	
1 Liter Bottles Bogle Pinot Noir	Repeat Inventory	\$12.39 1 Bottles	Bar 1 Bar 1	Wild Turkey 101 1L Arrow Creme de Menthe 1L	Call Liquor Well Liquor	0.65 0.24 1	Bottles Bottles	
750 ml Bottles	in a post in toricory	\$7.00	Bar 1 Bar 1	Barton California Brandy 1L Barton Gold Rum 1L	Well Liquor Well Liquor	1	Bottles	
Bomba y Gin	Sort Edit	0.4 Bottles + Done	Bar 1 Bar 1 Bar 1	Barton Reserve Whiskey 1L Barton Triple Sec 1L	Well Liquor Well Liquor	2	Bottles Bottles	
		2010	Bar 1	DeKuvoer Peachtree 1L	Well Liquor	0.69	Bottles	

Pour Cost Analysis

The reason behind using a Liquor Inventory Tracking system like Barkeep is to make sure that you aren't losing product either through theft, over-pouring, charging the wrong price, or other common problems.

The key to tracking your Liquor Usage is to understand your Pour Cost. Industry standard Pour Cost is in the 18-24% range, although this can vary based on many factors, including obviously the price that you charge for a particular drink, the price you pay for your product, the mix of well versus call versus premium sales, etc.

Getting a handle on your Pour Cost is an essential first step in identifying and solving any possible problems.

The starting point is to determine your alcohol usage over time and compare it to your sales. This will give you your gross Pour Cost. From there, you can decide whether or not it's worth looking at more details. If your Pour Cost is relatively low, below 20%, then you're doing really well and may not need to track it any more closely. However, if you're running in the 22%+ range, then it's probably worth some time to better understand where your liquor is going.

BarkeepOnline

BarkeepOnline is an add-on, hosted service that provides the tools to monitor and assess your Pour Cost. BarkeepOnline uses inventory data generated by Barkeep to track Liquor Usage and combines it with Sales Data either automatically generated by your POS system or manually entered into BarkeepOnline.

The unique feature of BarkeepOnline is that it determines exactly how much of each category of liquor should have been used based on your Sales Data and calculates exactly how much "lost product" has been consumed. In other words, BarkeepOnline can tell you that, according to sales, you should have used 104.23 ounces of Call Liquor and instead you used 122.38 ounces, which is a loss of 18.15 ounces or a little over half a bottle. This is extremely powerful information, because it allows you to focus in on exactly which types of liquor you are "losing" and how much of it is getting "lost."

Barkeep customers typically reduce their overall Pour Cost by at LEAST 1%, and generally by 2-3%, by using BarkeepOnline. Reducing Pour Cost by 1-3% is equivalent to reducing the amount that you spend on liquor by 5%-15%. Do a little simple math, and you'll see that Barkeep and BarkeepOnline will pay for themselves in the first month that you start using them. How's that for ROI!

Configuring your iPad for BarkeepOnline

To configure your **iPad** for BarkeepOnline, you must first register for a BarkeepOnline account. You do this by going to <u>barkeepapp.com</u>, clicking on BarkeepOnline, choosing New User, and then following the instructions for setting up a new BarkeepOnline account. As part of registering for a BarkeepOnline account, you will choose a username and password.

Note: There is a separate **BarkeepOnline User Guide** at barkeepapp.com

After you have created your BarkeepOnline account, you will need to register your Device(s) with BarkeepOnline.

Check your connection and battery life first!

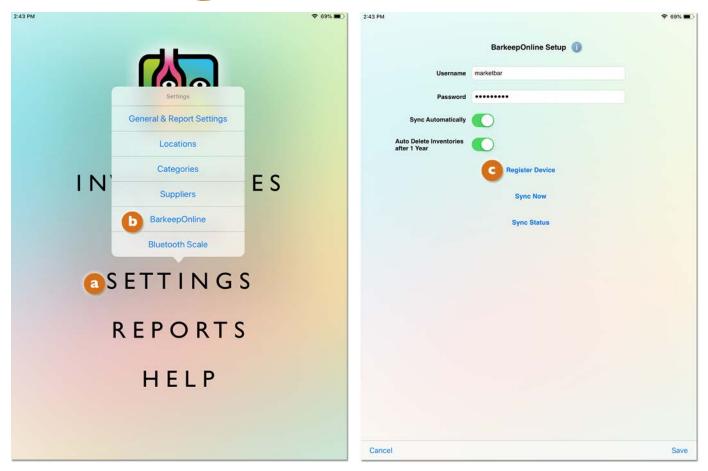
Before Registering any Device with BarkeepOnline, please make sure that you have a reliable network connection and plenty of battery life remaining on your Device (or your Device is plugged in). Registering your Device includes synchronizing data between your Device and your BarkeepOnline account. This process can take some time (15 minutes for hundreds of Inventories and 10's of thousands of Inventory Items), and this process should not be interrupted. So be prepared when you register your Device.

Note: If you are an existing BarkeepOnline subscriber and register a new Device with BarkeepApp and attempt to Copy Data to Server, you will receive an error message. You will have to reset your BarkeepOnline account first. See the **BarkeepOnline User Guide** for details.

Configuring Your iPad for BarkeepOnline (cont.)

To register your **iPad** with BarkeepOnline:

- I. Verify you have a reliable network connection and plenty of battery life.
- 2. Press Settings on the BarkeepApp Main Screen.
- 3. Then choose BarkeepOnline.
- 4. Enter the Username and Password that you chose when setting up your BarkeepOnline account.
- 5. Press Register Device.



- 6. If your Device can successfully connect to BarkeepOnline and log into your account with the username and password that you provided, you will be presented with an alert stating that your Device has been successfully registered. If registration fails, please confirm that you have supplied the correct username and password, and that your Device has a reliable network connection.
- 7. Next you have to make a decision regarding copying data (see below and please read carefully)

The Important Choice!

Once your Device has been registered, you will be asked whether you want to: Copy Data to Server or Copy Data From Server

First Device/Primary Device: You should choose a primary Device that contains the data that you would like to use to initialize your BarkeepOnline account. Register that Device FIRST, and choose **Copy Data to Server**. This will initialize your BarkeepOnline account with the data from your primary Device.

Additional Devices: You can then register additional Devices with your BarkeepOnline account. For additional Devices, choose *Copy Data From Server* and NOT *Copy Data to Server*. This will delete the existing data on your additional Devices and replace it with the data from your BarkeepOnline account.

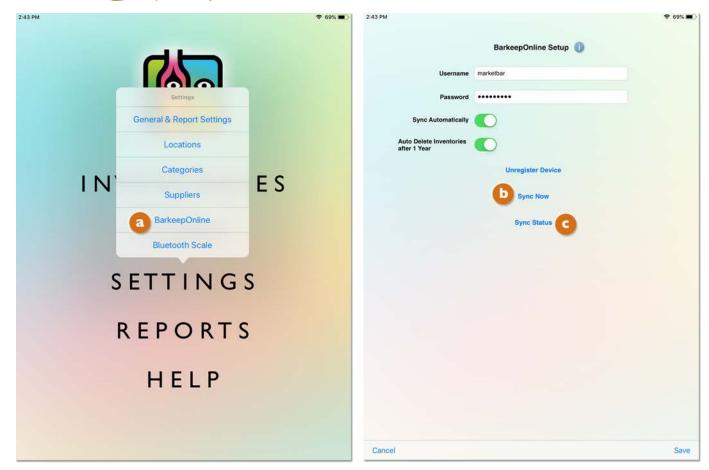
Sync Automatically

Once you have registered your Devices, any changes that you make on your Devices will be automatically synchronized with your BarkeepOnline account. And any data on your BarkeepOnline account will be automatically synchronized with your Devices. Multiple Devices can be kept in sync via a single shared BarkeepOnline account.

By default, BarkeepApp will automatically sync changes between your Device(s) and BarkeepOnline. This happens automatically in the background as long as your Device is on and has a reliable network connection and your account info remains valid.

If you don't want BarkeepApp to automatically sync data with your BarkeepOnline account, you can turn this feature off by deselecting the "Sync Automatically" option on the BarkeepOnline Set-up screen.

Note: You can also manually sync a Device by going to Settings <a>a and selecting <a>BarkeepOnline.



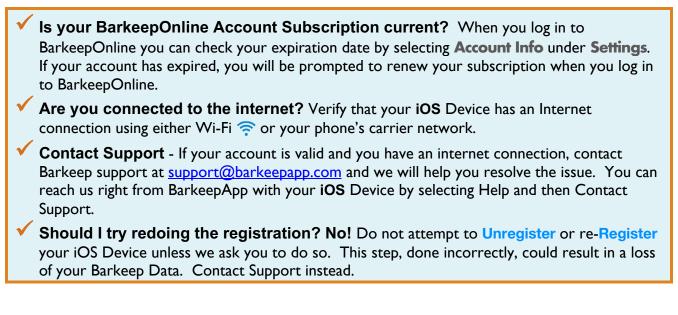
Reminder: We recommend that you turn on Auto Delete Inventories on any Devices that are registered with a BarkeepOnline account. See the **BarkeepOnline User Guide** for details.

Manual Sync and Sync Status

You can also manually sync a Device by going to Settings and selecting BarkeepOnline (a) and then pressing Sync Now (b) to sync a registered Device. You can verify your data was synced successfully by pressing Sync Status. (C)

Sync Automatically (cont.)

Why is my iOS Device not syncing with BarkeepOnline?



Sync Error Warning

When using BarkeepApp you might see the warning

4 icon 🙆 at the top of the screen.

This indicates that your registered, **iOS** Device is not syncing correctly.

By pressing **b** the icon **1** a pop-up warning will appear explaining there is a Sync Error.

Note: This warning will only occur if the **iOS** Device that has been registered with a BarkeepOnline account.



Data Backup

Only users who have registered their Device(s) with BarkeepOnline can take advantage of the automatic syncing feature. This is the recommended method for backing up the Barkeep data on your **iOS** Device(s).

When your **iOS** Device is backed up to your computer, your latest Barkeep data is usually included as part of the backup. Accessing that data would require restoring the entire Device. Only BarkeepOnline Users have their data backed up regularly and frequently with auto syncing.

Can I back up my Barkeep data with iCloud?

Yes, iCloud can be set to back up your Barkeep data file and would enable you to restore your data if needed.

Note: It is important to check your **iCloud** settings in your **iOS** Device to make sure your BarkeepApp data is being backed up.

Can I share Barkeep data between iOS Devices with iCloud?

No. An active BarkeepOnline account is the only way for users to use multiple Devices and share and sync data.

Glossary

Accuteck – a digital shipping scale that enables BarkeepApp to weigh kegs and manually enter the weight into Inventories. The scale is available for purchase at <u>barkeepapp.com</u>.

Banquet Inventories – a list of Transfer, Receiving, Return, Waste, and Empties Inventories associated with a Banquet. These inventories are directly associated with a Banquet and will be used to calculate Banquet Usage.

Category – crucial for organizing Items into logical groupings. Every Item in Barkeep should be assigned to a Category. Barkeep uses Nested Categories which means that a Category can also have a Parent Category. For example, users could create a Category called **Imported Vodka** which has a Parent Category called **Vodka** that itself has a Parent Category called **Liquor**. In this scenario, the Item **Absolut 1L** is assigned to the Category **Imported Vodka** which is part of the Category **Vodka**, etc.

CSV – is an alternative format for reports generated by BarkeepApp. The default format is Excel. The Reporting section of this User Guide has additional information.

Data – includes the Categories, Locations and Items in your account. Including the unique ones that you have added. Data also includes the Inventories you have performed with BarkeepApp.

Escali SmartConnect – a digital scale that enables BarkeepApp to automatically detect the weight of partial bottles. The manufacture discontinued the model. But existing scales purchased via <u>barkeepapp.com</u> continue to work with BarkeepApp.

Etekcity Luminary – a digital scale that enables BarkeepApp to automatically detect the weight of partial bottles. Only those purchased via <u>barkeepapp.com</u> are certified to work with BarkeepApp.

Infinea Tab – is a small device that attaches to the bottom of an **iPad**. The **Infinea Tab** and **Infinea Tab** M provide a barcode scanner, magnetic stripe reader, and backup battery supply.

iOS Device – refers to Apple Devices that support BarkeepApp including the **iPhone**, **iPod Touch** and **iPad**. Your Primary Device is the first Device you register with BarkeepOnline to upload your data to the BarkeepOnline servers.

Item – refers to any product that you carry in inventory – like **Absolut 1I** bottles, **Stella 15.5 Gal Kegs**. The Item contains general information about the product like its barcode, default price, default case size, container type (bottle • keg • can • each • box • bag • bag in box • carton), full bottle weight, empty bottle weight, etc.

Item Code – refers to a number or other identifier used by your Supplier to identify products when placing orders. It may be the same as the UPC barcode, or it may be a different identifier determined by your Supplier.

Inventory – Barkeep allows you to create six different types of Inventories each type each designed to generate different sets of information. Full definitions can be found in the Inventory section of this User Guide.

Inventory Item – refers to an entry in an Inventory specifying the quantity of an Item for a particular Location. Depending on the Inventory type, this can represent the quantity of an Item in stock in a particular Location, the quantity of an Item received into or returned from a Location, the quantity of an Item transferred between two Locations, the quantity of an Item wasted (broken, spilled, etc.) at a particular Location, or the number of empty bottles (breakage) for a particular Location.

Location – refers to separate Locations in your bar or venue. For example, you can have a single Location named "My Bar," or you can have many Locations like "Storage," "Walk-In Cooler," "Well 1," "Well 2," "Patio Bar," etc. Barkeep can track Inventory and usage by multiple Locations. You may set up just one Location or any number of Locations to suit your business.

Linea Pro – is a barcode scanner. This is the same device used in all Apple Stores to scan Items and process credit card transactions. The **Linea Pro** scanner is a small cradle that you slide an **iPod Touch** or **iPhone** into. The cradle provides a barcode scanner, magnetic stripe reader, and backup battery supply.

Pour Cost – is determined by dividing the cost of all liquor used by your sales over the same period. After completing an Inventory, you can generate a Usage Report. It will give you the totals needed to determine Pour Cost. Further information can be found in the Pour Cost section of this User Guide.

Recipe – in BarkeepOnline a "Recipe" refers to the mix of Items used in a Sales Item. A Recipe is how Barkeep defines the amount(s) of any products (Items) used in a Sales Item. For example, a Recipe can be the mix and amounts of liquor to make a particular cocktail, but a Recipe is also the 16 oz of **Guinness Draft Beer** in the Sales Item **Guinness Pint** or the 1.5 ounces of **Call Liquor** in the Sales Item **Call Shot**. Recipes are used to calculate how much liquor should be used for each of your Sales Items when calculating your Expected Usage and Expected Pour Cost.

Sales Items – refers to things that you sell and ring up on your cash register or POS system. Sales Items are defined in BarkeepOnline. The Sales Items should mirror the Sales Data that you generate from your POS System or cash register. While the names in your Sales Data and your POS System do not need to be an exact match, we suggest using names that are similar so that you can easily enter Sales Data and match it to your Sales Items in BarkeepOnline. Sales Items should not be confused with Items as in the products your carry and enter into Barkeep (see Items defined on previous page).

Starting Inventory – refers to an initial Full Inventory that is used as base to compare data with future Inventories.

Supplier – refers to any Supplier, vendor or company that provides you with Items (the products you carry in Inventory).

Variance – is how Barkeep describes the difference between how much liquor you used versus how much you should have used (based on your sales). A positive number in your Variance means that you used more than you should have, and a negative number indicates that you used less than expected.

Venue – is the term Barkeep uses to describe the different bars, clubs and restaurants you may own or manage. We do not refer to these as "locations." Location has a different definition in Barkeep (see above).