



User Guide for BarkeepPro

Version 7.0
September 2024

Who should use this User Guide?

This user guide contains supplemental instructions for BarkeepOnline subscribers with a BarkeepPro account. The instructions are for Account Administrators and other users authorized as Admins.

The instructions in this user guide assume you are familiar with using BarkeepApp and BarkeepOnline. All the basic instructions for using Barkeep can be found in the other user guides. You and your staff taking Inventory and running reports may need to refer to them from time to time.

For additional instructions please see:

[**BarkeepOnline User Guide**](#)

[**BarkeepApp User Guide \(iPad\)**](#)

[**BarkeepApp User Guide \(iPhone/iPod Touch\)**](#)

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About BarkeepPro v7.0

BarkeepPro is an enhanced version of BarkeepOnline that works in conjunction with BarkeepApp. It includes all the features available with BarkeepOnline as well as additional features that are ideal for:

- Large venues including hotels, casinos, and country clubs.
- Managing more than one venue/account.
- Auditors using Barkeep to provide inventory services to their clients.

BarkeepPro Features¹

Some of the exclusive features available with BarkeepPro include:

- **Multiple Venues**
Users can manage multiple venues from a single account.
- **Multiple Venues with a single iOS Device**
BarkeepPro makes it simple to switch between accounts on a single iOS Device.
- **Multiple Users, Individual Passwords and Permission Levels**
BarkeepPro allows you to designate Account Administrators. Only they can add and manage individual users for their account. They also assign a user's level of access to data and the ability to use certain features. For example, certain staff members can be given permission to carry out inventories without having access to sales data and BarkeepOnline reports.
- **Audit Trail**
Review and track activity for your BarkeepPro users. Selecting Audit Info will show when Inventories were created or updated. You will be able to see either which user was logged in to BarkeepOnline or which registered iOS Device was used.
- **Manage Registered Devices**
Review a list of all Devices and track when they last synced to your account.
- **Manage Sales Data by Location within a single Venue**
BarkeepPro users can upload Sales Data by Location and run Variance Reports by Locations. For example, a Venue with separate bars and restaurants such as a hotel or large club.

BarkeepPro for Auditors

BarkeepPro is recommended for auditors using Barkeep to provide inventory and auditing services to their clients. Auditors can take advantage of the Multiple Venue features to manage their client accounts. All of the instructions in this user guide can be applied to both single businesses that operate Multiple Venues and to auditors servicing different clients and their Venues.

Some instructions in this user guide make recommendations about using consistent Categories and Items. There are also instructions for copying data from one Venue to another. These instructions will not always be applicable for auditors because their unique clients offer different products (Items), have varied serving sizes and categorize Items differently to match their own POS Systems.

¹ BarkeepPro requires BarkeepApp v6.0 or later.

Managing Venues

Every BarkeepPro account has at least one Venue. When a BarkeepPro account is created² it automatically creates your first Venue. This section includes instructions for setting up and managing your Venue. You can add as many users as you need and assign them to your Venue (or additional Venues)

More than one Venue?

BarkeepPro allows you to manage Multiple Venues with one BarkeepPro account. With BarkeepOnline, when your business has more than one Venue, you need to have a separate account for each Venue. This section will include instructions for adding additional Venues.

Do I need to create separate Venues?

Yes. Barkeep is designed to manage your data, including Inventories, Sales Items and Sales Data, separately by Venue. Even if you have a single business that owns three different bars, you will need to set up a separate Venue for each bar. If you tried to combine multiple Venues into a single Venue, you would not be able to use Barkeep effectively and would not be able to run accurate reports. Barkeep Support cannot assist users when they attempt to use Barkeep in a way it was not designed to be used.

What is the difference between a Location and a Venue?

When we use the term “Location” in Barkeep we mean different locations within a single Venue (e.g., store room, walk-in cooler, bar, etc.). You might refer to your different Venues as “locations” as in “We have a location in Oakland and two locations in San Jose.” To avoid confusion, we use the word “Venue” when referring to other bars and clubs you may own or manage.

² **Note:** If you upgrade from a regular BarkeepOnline account to BarkeepPro your account will also start with one Venue.

Upgrading to BarkeepPro

BarkeepPro Costs

The annual cost for BarkeepPro is \$500 for the first Venue (\$400 for each additional Venue).³
The monthly cost for BarkeepPro is \$50 for the first Venue (\$40 for each additional Venue).

If you are a current BarkeepOnline subscriber, to upgrade to BarkeepPro:

1. Log in to BarkeepOnline and choose **Account Info** **a** from the menu.
2. Press the **Upgrade to BarkeepPro** button **b** and a new window will appear.
3. Choose an annual or monthly subscription. **c**
If you are less than five days from your automatic renewal, you will be charged the full BarkeepPro amount (\$50 or \$500) and your account will be renewed immediately.
If you are more than 5 days from your renewal, you will see a calculation **d** of the pro-rated cost to convert your existing subscription to BarkeepPro.
4. The next step is to press the **Upgrade Account** **e** button at the bottom of the screen (press cancel if you do not wish to upgrade).
5. A pop-up **f** will indicate that Barkeep is redirecting you to PayPal.

The screenshot displays the BarkeepOnline web interface. On the left is a navigation menu with 'Account Info' highlighted and marked with a red circle 'a'. The main content area shows 'Account Info' with a 'Getting Started' section and a 'BarkeepOnline User Guide' button. A modal window titled 'Upgrade to BarkeepPro' is open, showing a 'Thank you for choosing to upgrade to BarkeepPro!' message with a red circle 'd' next to the renewal date '09/11/2019'. Below this, 'Subscription Options' are shown with 'Recurring Annual Renewal Subscription: \$500.00/year' selected and marked with a red circle 'c'. The 'Terms of Service' section has two checked boxes. At the bottom of the modal, an 'Upgrade Account' button is marked with a red circle 'e'. A separate pop-up window titled 'Upgrade to BarkeepPro' is shown in the bottom right, with a loading spinner and a 'Cancel' button, marked with a red circle 'f'. A red circle 'b' is placed over the 'Upgrade to BarkeepPro' button in the main interface.

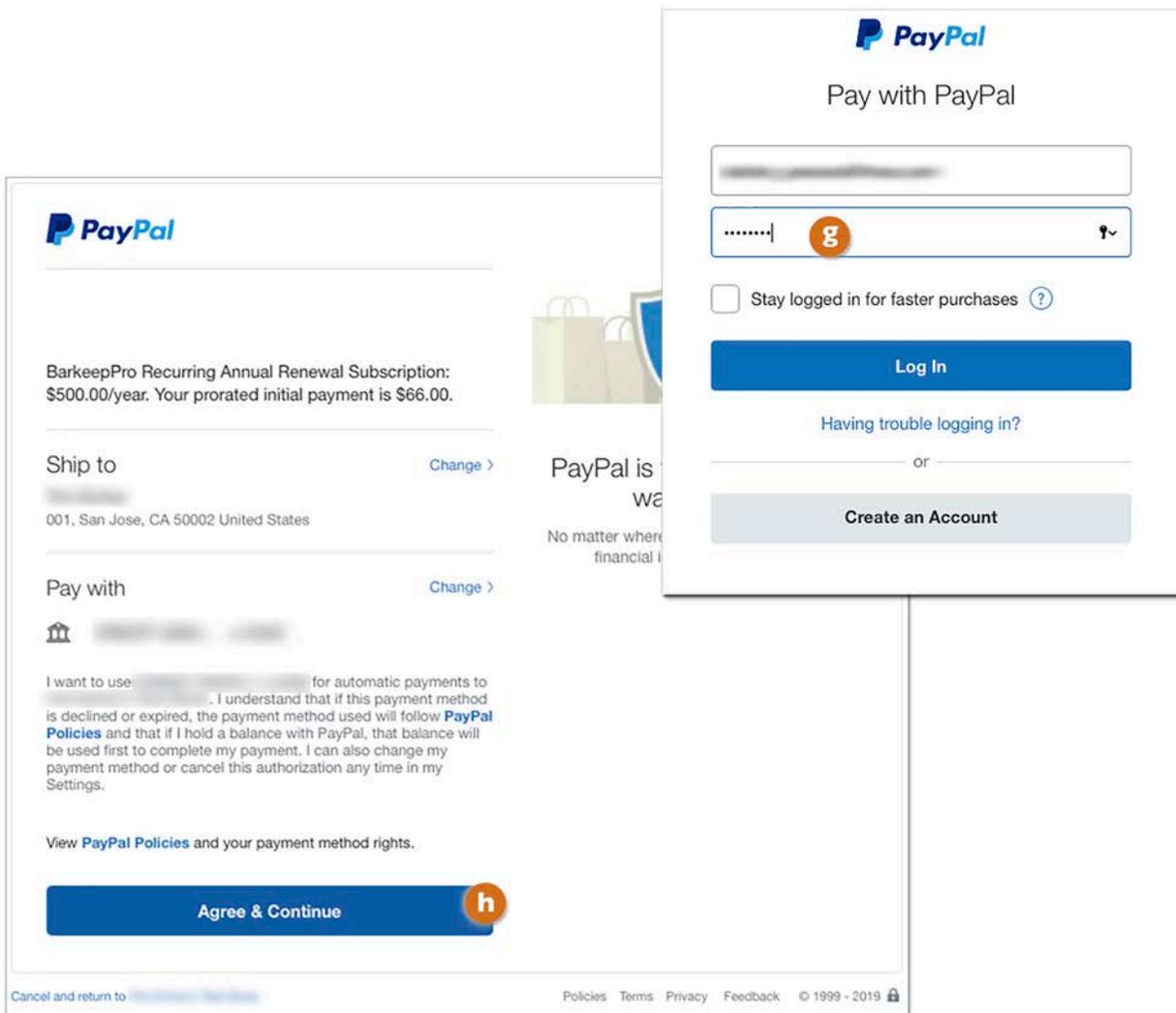
To add a brand new Venue to an existing BarkeepPro account, skip ahead to [Adding a New Venue](#).

[continue to next page](#)

³ All prices subject to change.

Upgrading to BarkeepPro (cont.)

6. Log in **g** to your PayPal Account.
7. Next review the bank account or credit card that will be used for your BarkeepPro subscription. You can press [Change](#) if you want to use a different account.
8. After you confirm your selection, you will see a new screen where you have to agree **h** to the payment.
9. PayPal will automatically suspend your previous PayPal Payment profile and create a new one.
10. Once PayPal processes your transaction you will be automatically signed out and redirected to Barkeep.
11. Your final step will be to press confirm in Barkeep to charge your account and process the upgrade. [See page 11](#) for details.



Can I merge existing BarkeepOnline accounts into one BarkeepPro account?

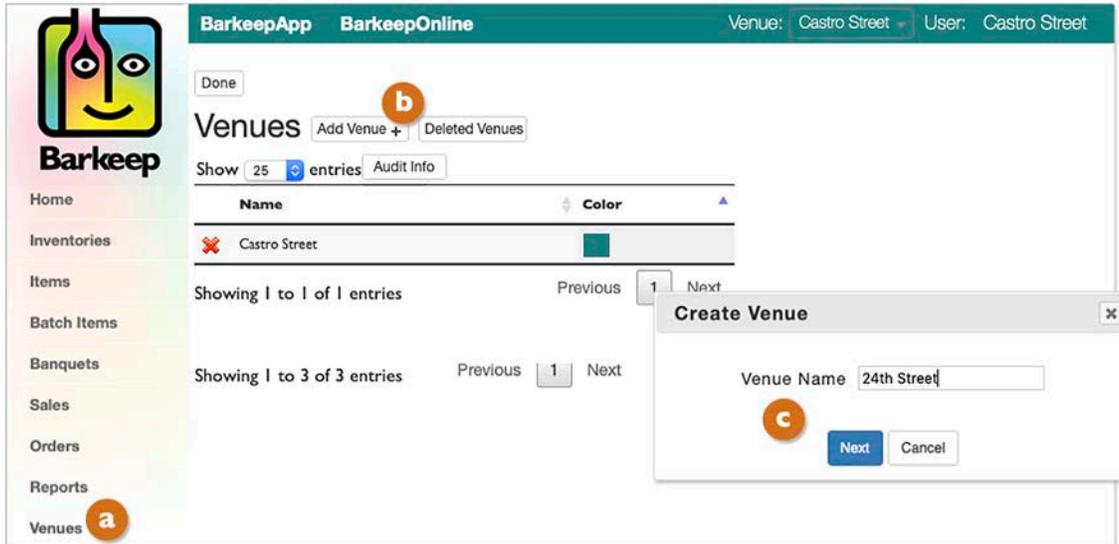
Yes. Your existing accounts can be merged into one BarkeepPro account and each account will be treated as a separate Venue. If you have more than one account to upgrade, please contact Barkeep Support at support@barkeepapp.com and we will assist you with setting up and merging accounts and applying the additional venue pricing.

Adding a New Venue

If your business has more than one Venue, you will need to add additional Venues to your BarkeepPro account. Only an Account Administrator is able to add a Venue.

To add a brand new Venue:

1. Log in to BarkeepOnline and choose **Venues** **a** from for a list of your Venues.
2. Select the Add Venue button. **b**
3. A pop-up will appear **c** where you need to enter a unique name for your Venue. We recommend choosing Venue names that are distinct and will be obvious when your staff uses BarkeepPro. This is to prevent adding inventories to the wrong Venue.
4. Press the **Next** button and begin copying data from an existing Venue (see below)



Copying Venue Data

from one Venue to a new Venue

After you have entered a Venue name, your next step is to copy data from one of your existing Venues. This will save time by copying Items, Categories, Suppliers, etc. You will not need to “start from scratch.” With your new Venue, you might need to add some additional Items, or delete a few Items after copying after the process is completed. But, when your Items list is similar from Venue-to-Venue, we recommend this step.

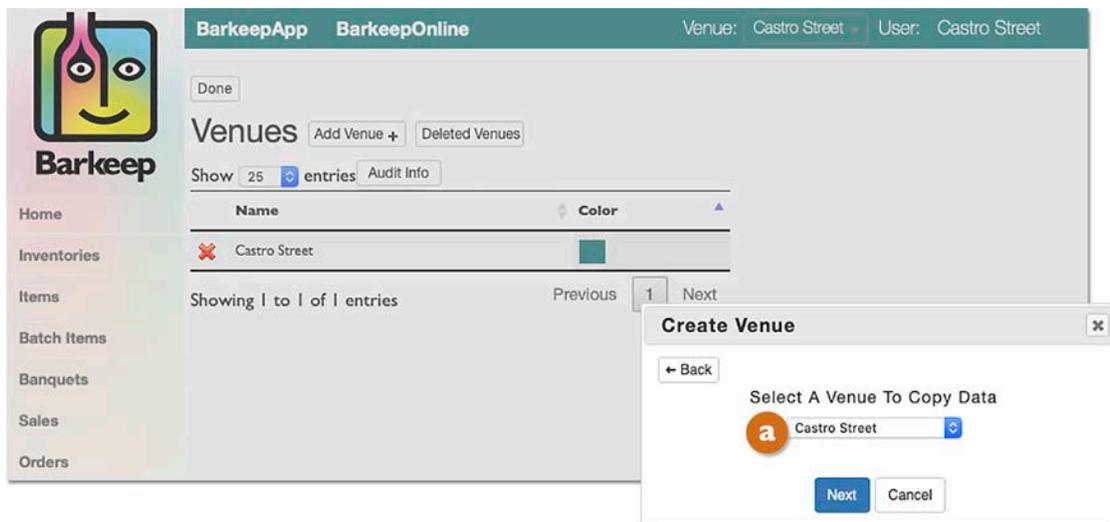
Note: Copying your basic data, Items, Categories, etc. can only be done when you first set up your Venue. It is not possible come back later and move data from one Venue to another.

continue to next page for details

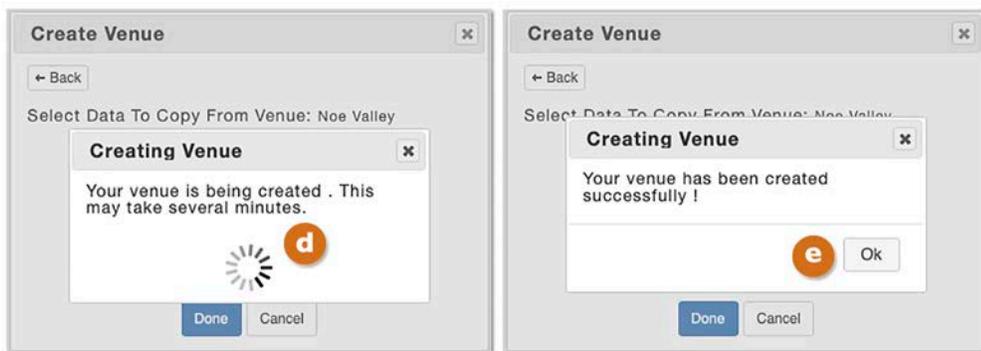
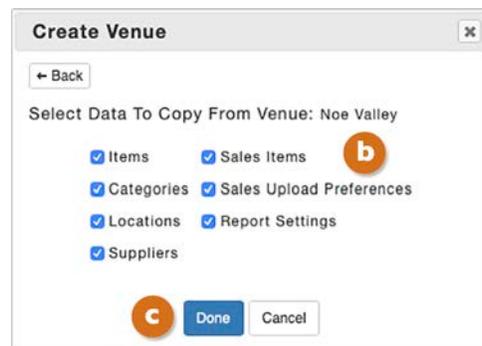
Copying Data from one Venue to a new Venue (cont.)

To copy data:

1. After you press the **Next** button (**previous page**) you will see a pop-up asking you to select a Venue.
Note: You can only Copy data from one Venue.
2. Choose a Venue from the menu. **a**



3. Next a new pop-up will appear for you to select the data you wish to copy. **b** By default, all of the options are selected.
4. After you make changes, if needed, **c** press the done button.
5. If you do not choose to copy Sales Items, you can upload Sales Items spreadsheet later from any of your Venues — see the **Copying Sales Items** section for more details.
6. If you do not want to copy any data but still create a new Venue, simply uncheck all the boxes.
7. A pop-up will appear to indicate your data is being copied. **d** Depending on the size of your data, this might take several minutes. Please be patient. After the process is successfully completed, **e** you will see a confirmation.
8. Now, your copied data is unique for your new Venue.

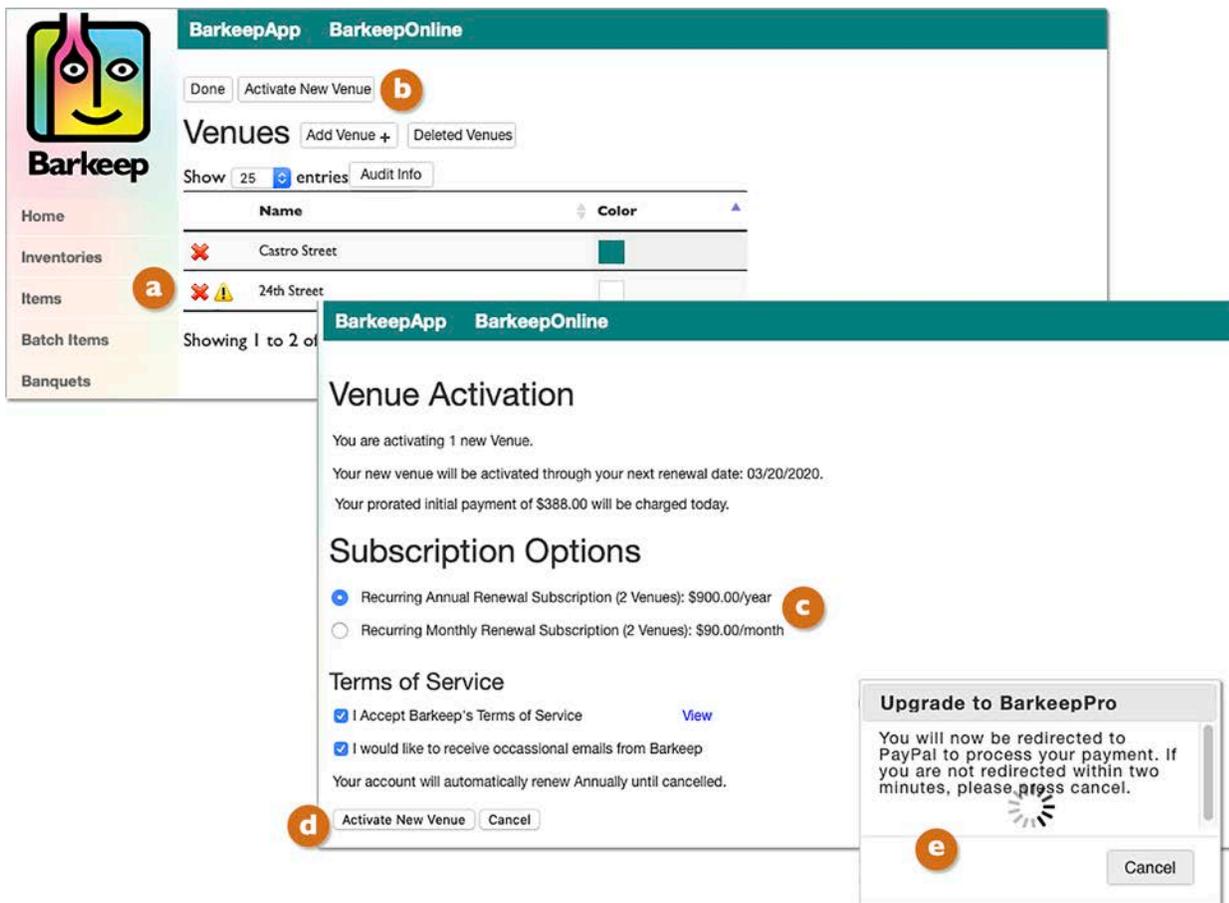


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Activating your New Venue

Your Venue now appears in the list. Before you can access and use your new Venue, it needs to be activated by processing a payment. To activate a new Venue:

1. The warning  icon. **a** indicates that your Venue needs to be activated with a payment.
2. Press the **Activate New Venue** button. **b**
3. A new screen appears where you select an annual or monthly subscription. **c**
Every one of your Venues must be billed either annually or monthly. It is not possible to have some bill annually and some bill monthly.
 - Your first Venue subscription is \$500 annually/\$50 monthly.
 - Every additional subscription costs \$400 annually/\$40 monthly.⁴
 - If you are less than five days from your automatic renewal, you will be charged the full BarkeepPro amount (\$50 or \$500) at your next renewal.
 - If you are more than five days from your automatic renewal, you will be charged a prorated amount to activate your new Venue(s) through your next renewal date.
4. When you press the **Activate New Venue** button **d** at the bottom the screen.
5. A pop-up **e** will indicate that Barkeep is redirecting you to PayPal.



Note: Even with multiple Venues, you will only have a single renewal date for annual subscriptions or the same day of the month for monthly subscriptions. When you activate new venues and authorize a new PayPal payment profile, any other existing PayPal payment profiles will be suspended.

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⁴ All prices subject to change.

Activating your New Venue (cont.)

6. Log in **f** to your PayPal Account.
7. Next review the bank account or credit card that will be used for your BarkeepPro subscription. You can press **Change** if you want to use a different account.
8. After you confirm your selection, you will see a new screen where you have to agree **g** to the payment.
9. PayPal will automatically suspend your previous PayPal Payment profile(s) and create a new single PayPal Payment Profile. All of your Venues will be billed with one profile with one renewal date.
10. Once PayPal processes your transaction you will be automatically signed out and redirected to Barkeep (**see next page**).

The image shows a PayPal checkout page for a BarkeepPro subscription. The main page displays the following information:

- PayPal** logo at the top left.
- Subscription details: BarkeepPro Recurring Annual Renewal Subscription: \$400.00/year. Your prorated initial payment is \$388.00.
- Shipping information: Ship to [redacted], 001, San Jose, CA 50002 United States. A **Change >** link is available.
- Payment method: Pay with [redacted]. A **Change >** link is available.
- Terms and conditions: I want to use [redacted] for automatic payments to [redacted]. I understand that if this payment method is declined or expired, the payment method used will follow **PayPal Policies** and that if I hold a balance with PayPal, that balance will be used first to complete my payment. I can also change my payment method or cancel this authorization any time in my Settings.
- Agreement: View **PayPal Policies** and your payment method rights.
- Bottom button: **g** Agree & Continue

A callout box titled "Pay with PayPal" is overlaid on the right side of the page, showing the login process:

- PayPal logo and "Pay with PayPal" text.
- Input fields for email/phone and password.
- Checkbox: Stay logged in for faster purchases ?
- Blue button: **f** Log In
- Link: Having trouble logging in?
- Text: or
- Grey button: Create an Account

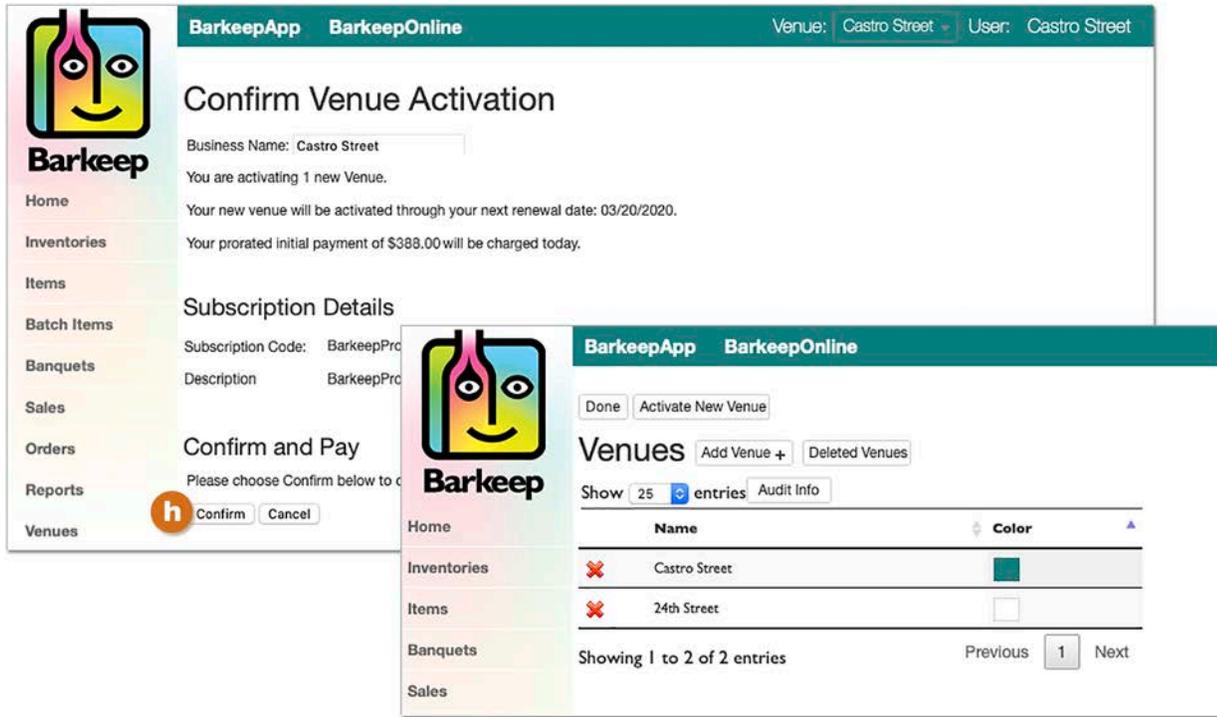
At the bottom of the main page, there are links for Policies, Terms, Privacy, Feedback, and a copyright notice: © 1999 - 2019.

Reminder: If you need to upgrade multiple, existing BarkeepOnline accounts to BarkeepPro please contact Barkeep Support at support@barkeepapp.com and we will assist you with setting up and merging accounts.

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Activating your New Venue (cont.)

11. After you are redirected to Barkeep, your final step will be to press confirm  to charge your account and activate the new Venue.
12. After you confirm your activation, the warning  icon will no longer be displayed. This indicates that your new Venue is active and ready to use.



The screenshot displays the BarkeepOnline interface. The top navigation bar includes the Barkeep logo, 'BarkeepApp BarkeepOnline', and dropdown menus for 'Venue: Castro Street' and 'User: Castro Street'. The main content area is titled 'Confirm Venue Activation' and contains the following text:

Business Name: Castro Street
You are activating 1 new Venue.
Your new venue will be activated through your next renewal date: 03/20/2020.
Your prorated initial payment of \$388.00 will be charged today.

Below this is the 'Subscription Details' section, followed by a 'Confirm and Pay' section with a 'Confirm' button (marked with a red 'h' icon) and a 'Cancel' button.

Overlaid on the bottom right is a 'Venues' management screen. It features a 'Done' button and an 'Activate New Venue' button. The 'Venues' section includes an 'Add Venue +' button and a 'Deleted Venues' button. A 'Show 25 entries' dropdown and an 'Audit Info' button are also present. A table lists the venues:

	Name	Color
Inventories	Castro Street	
Items	24th Street	

At the bottom of the table, it says 'Showing 1 to 2 of 2 entries' and includes 'Previous', '1', and 'Next' navigation options.

Venue Settings

Once your new Venue is activated you should review the Settings for that Venue.

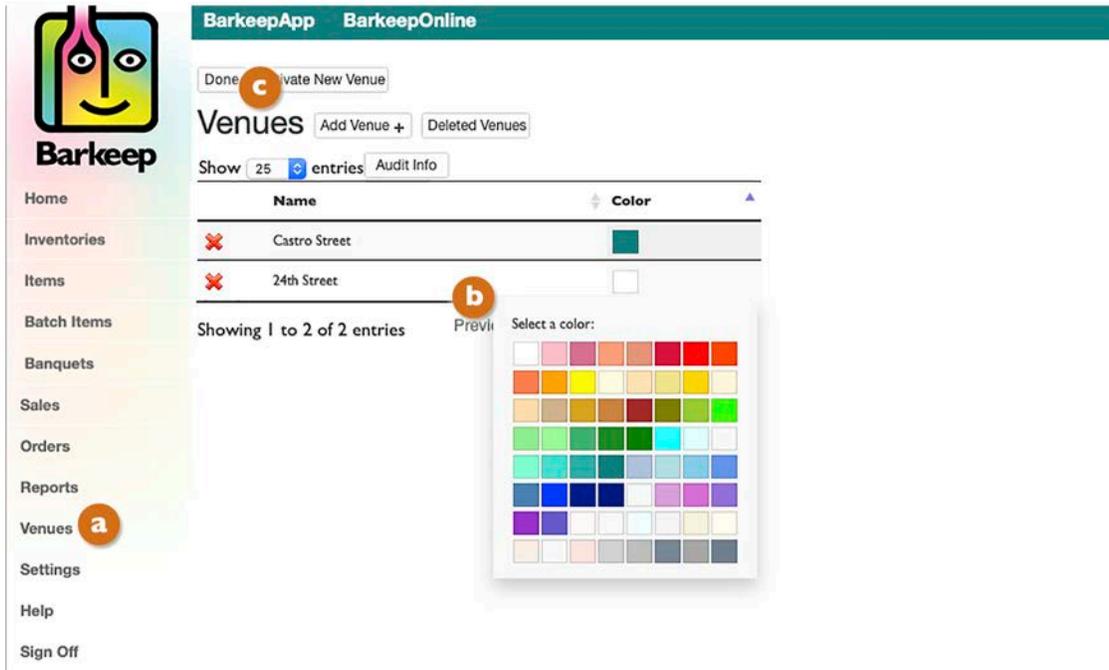
You can also assign additional users to any Venue, and when appropriate, give them Admin access for the Venue(s). You also can limit the access of users — see [Managing Users](#).

Assigning a Color to your Venue

We recommend assigning a different color for each Venue as a visual reminder for which Venue you are currently working in. Your color choice will also sync to every **iOS** Device that is registered with the Venue. This is useful when an **iOS** Device is authorized to switch between Venues.

To assign a color to a Venue

1. Log in to BarkeepOnline and select **Venues**. **a**
2. Select the color box **b** for the Venue you would like to choose or change the color for. We recommend a unique and contrasting color for each Venue.
3. Press the button on the top of the screen **c** to save your changes.



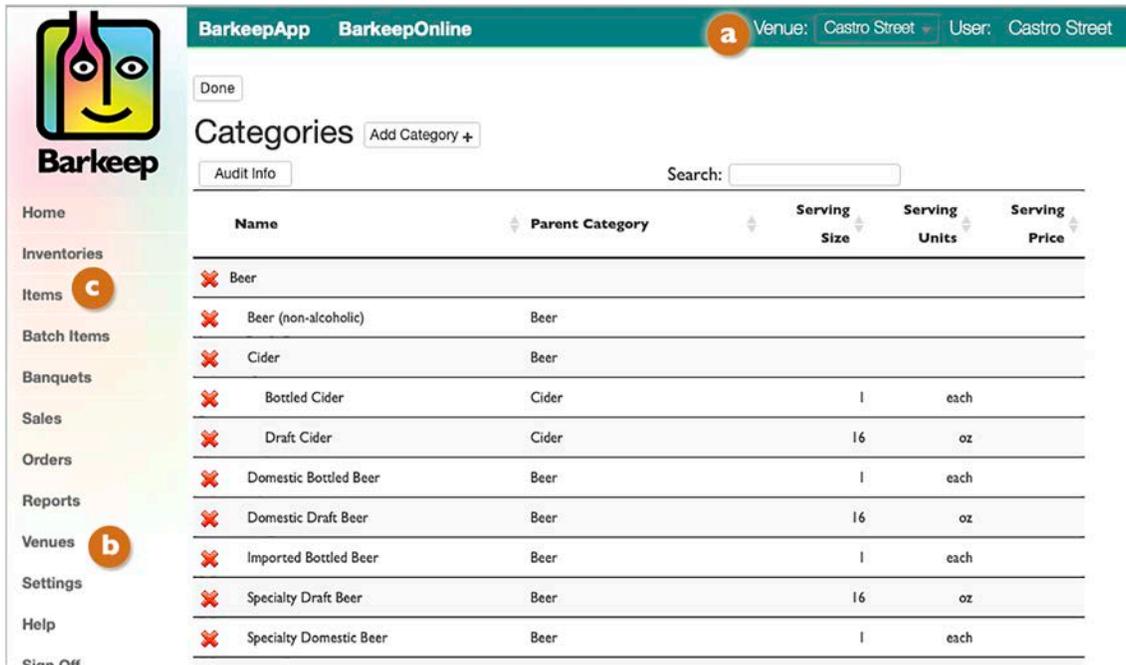
Note: Color choices can only be set by an Account Administrator by accessing the Venue online in BarkeepPro. Color choice settings cannot be accessed with BarkeepApp.

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Venue Settings (cont.)

The top of the screen will indicate which Venue you are in. **a** The steps to change Settings **b** such as Categories, Locations, etc. remain the same. Managing your Items **c** with BarkeepPro is the same as with a regular BarkeepOnline account as well.⁵ If you need instructions see the [BarkeepOnline User Guide](#).

The changes and additions you make in Settings for each Venue are unique for that Venue. Once you have finished copying over data from another Venue, for example the Categories and Items, the data set is unique to that Venue. If you change a Category name, add an Item, etc. Those changes are only for the current Venue you are working in.



The screenshot shows the BarkeepApp interface for the 'Castro Street' venue. The top navigation bar indicates the venue and user. The left sidebar lists various settings categories, with 'Settings' highlighted. The main content area is titled 'Categories' and features a search bar and an 'Add Category +' button. Below this is a table listing various beverage categories with their parent categories, serving sizes, and units.

Name	Parent Category	Serving Size	Serving Units	Serving Price
Beer				
Beer (non-alcoholic)	Beer			
Cider	Beer			
Bottled Cider	Cider	1	each	
Draft Cider	Cider	16	oz	
Domestic Bottled Beer	Beer	1	each	
Domestic Draft Beer	Beer	16	oz	
Imported Bottled Beer	Beer	1	each	
Specialty Draft Beer	Beer	16	oz	
Specialty Domestic Beer	Beer	1	each	

Can different Venues have different Categories?

Whenever possible, consistency is best. When you have multiple Venues, we recommend using the same Categories and the same Nested Category configuration in all your Venues. But in some situations, one Venue might have different specialties that require a more detailed Category set up. For example, if a Venue is a wine bar, brew pub, etc.

Tip: Review your Locations

Before your first Inventory, be sure to review your Locations (bar stations, storage, etc.). Even when your Categories and Items are the same for different Venues, the Locations are usually different.

Changing a Venue's Name



If you need to change a Venue's name, the Account Administrator can change the name in the Venue's list. Your name change will sync automatically to all registered iOS Devices.

⁵ The changes can also be made on an iOS Device in BarkeepApp when it is registered with the Venue.

Deleting a Venue

When a Venue closes, or perhaps you no longer need to use Barkeep for a Venue, you are able to delete that Venue.

To delete a Venue:

1. Only an Account Administrator is allowed to delete a Venue.
2. Log in to BarkeepOnline and choose **Venues** **a** from the menu for a list of your Venues.
3. Press the red **X** next to the Venue you wish to **b** delete
4. A pop-up will appear asking you to confirm your decision. **c**
Note: Technically you are not deleting a Venue, but actually deactivating it.
5. Note the Deleted Venues button. **d** When you press the button, a list **e** of Deleted Venues will appear.
6. If a Venue was inadvertently deleted or needs to be reactivated, you can press the Restore button and it will be moved back to your list of Venues.
7. See below for billing details when you delete a Venue.

The screenshot shows the BarkeepOnline interface. The top navigation bar includes 'BarkeepApp BarkeepOnline', 'Venue: Castro Street', and 'User: Castro Street'. The left sidebar has a 'Venues' menu item highlighted with a red circle 'a'. The main content area shows a 'Venues' list with columns for 'Name' and 'Color'. The 'Berkeley Pub' entry is highlighted in red and has a red 'X' icon next to it, with a red circle 'b' next to the icon. A confirmation dialog box titled 'Delete Venue?' is open, asking 'The Venue Berkeley Pub will be permanently deleted. Are you sure?' with 'Delete' and 'Cancel' buttons, and a red circle 'c' next to the 'Delete' button. A 'Deleted Venues' button is highlighted with a red circle 'd'. A 'Deleted Venues' pop-up window is shown with a red circle 'e', displaying a table with one entry: 'Berkeley Pub' with a 'Restore' button. The table has columns for 'Name' and 'Color'.

Billing and Deleted Venues

When you delete a Venue, the future billing will be updated and will not include the deleted Venue.

- If you restore a Venue within the existing subscription period, the Venue will be including in the renewal billing.
- If you restore a Venue after the subscription expires, a new payment will be required.
- Barkeep's Terms of Service do not allow refunds or credits. It is not possible to apply credits to other accounts and/or Venues.
- If you want to switch from BarkeepPro to regular BarkeepOnline contact us at support@barkeepapp.com

We sold the business, is there a way to transfer the Venue to a new owner?

Yes. On occasion our users sell a business and they wish to transfer their Barkeep data to the new owners. When that happens, contact us at support@barkeepapp.com

Switching Venues in BarkeepOnline

Permissions and access to Venues is managed by the BarkeepPro Account Administrator. See [Admin Settings](#) section for details.

To switch to a different Venue:

1. With a BarkeepPro account, there is a drop-down menu in the top right corner **a** of the screen.
2. Simply use the menu to select the Venue you wish to switch to. Only Venues that are linked to the same account will appear in the menu.
3. After making a selection you will immediately see the main screen.
4. Notice how the current Venue name **b** now appears in the top of the screen.
5. Also notice that the color **c** you have set for that Venue now appears at the top of the screen.
Reminder: We recommend assigning a different color for each Venue as a visual reminder of which Venue you are currently working in.

Inventory Type	Inventory Date	Item Count	Total Cost	Description	Supplier	Invoice Number	Invoice Amount	Notes
Waste	02/03/2019	2	\$53.50					
Full	02/03/2019	185	\$10,553.04					
Receiving	02/01/2019	20	\$5,324.80		ABC Beers		\$0.00	
Receiving	01/29/2019	1	\$316.80		ABC Beers		\$0.00	

Welcome

Welcome to BarkeepOnline. Your BarkeepOnline Account allows you to manage your inventories, upload sales data, identify sales discrepancies, analyze your pour cost, and create liquor orders based on par levels.

Account Info

Your BarkeepOnline account expires on: 2020-01-01

Getting Started

Find out how to get started with BarkeepOnline by downloading the BarkeepOnline User Guide or viewing the Getting Started Video

[BarkeepOnline User Guide](#) [Download User Guide](#)

Note: Account Administrators have access to all of a BarkeepPro account's Venues. For other staff, when they log in to BarkeepOnline with their username, they will only be able to switch to Venues that they are authorized to access.

Managing Users

Account Administrators

Every BarkeepPro Account must have at least one Account Administrator. They can add and authorize as many users as needed. Account Administrators can manage Users, User Permissions, and Venues. Account Administrators automatically have Admin Permissions for every Venue in the account.

Account Administrator Access

Only Account Administrators can:

- Add, modify and delete Venues.
- Add, modify and delete users and grant permission levels to users.
- Assign users to Venue(s).
- Designating other users as Account Administrators.

Can a user have access to more than one Venue?

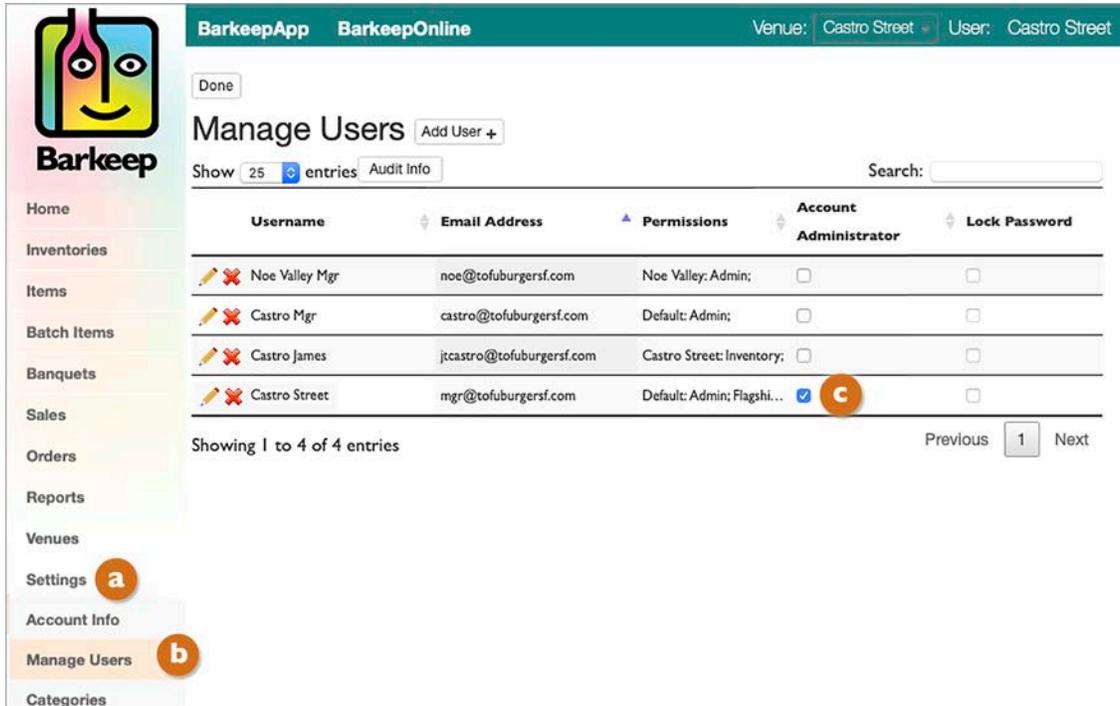
Yes. For example, a bartender in one of your Venues who helps with inventory, typically will only be given access to that one Venue. But some staff members may be given access to more than one Venue. The chart below shows the three access levels.

Permission Level	User Type		
	Account Administrator	Admin	Inventory
Manage Venues including adding Venues	√		
Manage Users Including adding, modifying, deleting and setting permissions and access to Venues, locking passwords	√		
Manage Sales Items and Sales Data	√	√	
Variance and Pour Cost Reports	√	√	
Review Audit Trail	√	√	
Access to BarkeepApp and BarkeepOnline	√	√	√
Manage Venue Settings such as Categories, Locations, Suppliers	√	√	√
Manage Items including adding and modifying	√	√	√
Manage Batch Items	√	√	√
Inventories	√	√	√
Inventory Related Reports, i.e., Usage, Summary, etc.	√	√	√
Order and Perpetual Reports	√	√	√

Account Administrator Settings

To access and manage your Settings:

1. Log in to BarkeepOnline and choose **Settings** **a** and select **Manage Users** **b** from the menu.
2. The list will include all of the users for your BarkeepPro account.
3. Only users designated Account Administrator **c** will have access to this information.



The screenshot displays the 'Manage Users' page in the BarkeepOnline application. The top navigation bar shows 'BarkeepApp BarkeepOnline' and the current venue and user as 'Castro Street'. The left sidebar contains a menu with 'Settings' (marked 'a') and 'Manage Users' (marked 'b') highlighted. The main content area shows a table of users with the following data:

Username	Email Address	Permissions	Account Administrator	Lock Password
Noe Valley Mgr	noe@tofuburgersf.com	Noe Valley: Admin;	<input type="checkbox"/>	<input type="checkbox"/>
Castro Mgr	castro@tofuburgersf.com	Default: Admin;	<input type="checkbox"/>	<input type="checkbox"/>
Castro James	jtcastro@tofuburgersf.com	Castro Street: Inventory;	<input type="checkbox"/>	<input type="checkbox"/>
Castro Street	mgr@tofuburgersf.com	Default: Admin; Flagshi...	<input checked="" type="checkbox"/> c	<input type="checkbox"/>

At the bottom of the table, it says 'Showing 1 to 4 of 4 entries' and 'Previous 1 Next'.

Note: You cannot manage Account Administrator settings from BarkeepApp.

BarkeepOnline account email address

With every BarkeepOnline account you select an email address for your account. It is important to choose an email address that is the same one you will use to communicate, if needed, with Barkeep Support. Your inquiries might be for technical questions, account administration or billing issues. Many users have more than one email address, but when you do not contact us from the registered email address, it can delay our response while we authenticate your inquiry.

Note: Only Account Administrators have the ability to add and update user email addresses.

continue to next page

Adding Users

Unique Usernames

Every user needs a unique username. Because the username is used to sign in and sync with the Barkeep Server, it must be unique for the entire Barkeep System — not just your BarkeepPro account. When choosing usernames, you might find that common names like **Bob** and **Mary** are probably in use, as well as **bartender**, **manager**, etc. Think of it like choosing a unique username or email address for any large system. For example, if they are not already in use, you can have usernames like **Bob338**, **Mary456**, **Mgr Baker Street**, etc.

To add a new user:

1. Log in to BarkeepOnline and choose **Settings** **a** and select **Manage Users** **b** from the menu.
2. On the Manage Users screen, press the **Add User** button. **c**
3. You will see a **Create New User** pop-up screen. Add a username **d** and then a password.
4. Barkeep will auto generate a password, or you can **e** create your own.
5. Next, finish by pressing **Create User**. **f**

Note: If you have chosen a username that is already in use, you will see an alert and need to change the username.

• Username - An account with this username already exists. Please select a different username.

The screenshot shows the BarkeepOnline interface. On the left is a sidebar menu with items like Home, Inventories, Items, Batch Items, Banquets, Sales, Orders, Reports, Venues, Settings (a), Account Info, and Manage Users (b). The main area is titled 'Manage Users' and includes an 'Add User +' button (c). Below this is a table with columns: Username, Email Address, Permissions, Account Administrator, and Lock Password. The table lists several users, including 'Castro Mgr', 'tofuburger comptroller', 'Noe Valley Jose', 'Castro James', 'Castro Street', and 'Noe Valley Mgr'. A 'Create New User' pop-up is overlaid on the table, with fields for Username (Berkeley Mgr, d), Password (ciDwek: Strong Password), Repeat Password (ciDwek: Strong Password), Email Address, and Account Administrator? (checkbox). A Safari alert is also visible, stating 'Safari created a strong password for this website. This password will be saved to your iCloud Keychain and will AutoFill on all your devices. Look up your saved passwords in Safari Passwords preferences or by asking Siri.' Buttons 'Don't Use' and 'Use Strong Password' are present. At the bottom of the pop-up are 'Create User' (f) and 'Cancel' buttons.

continue to next page to manage permissions and assign Venues

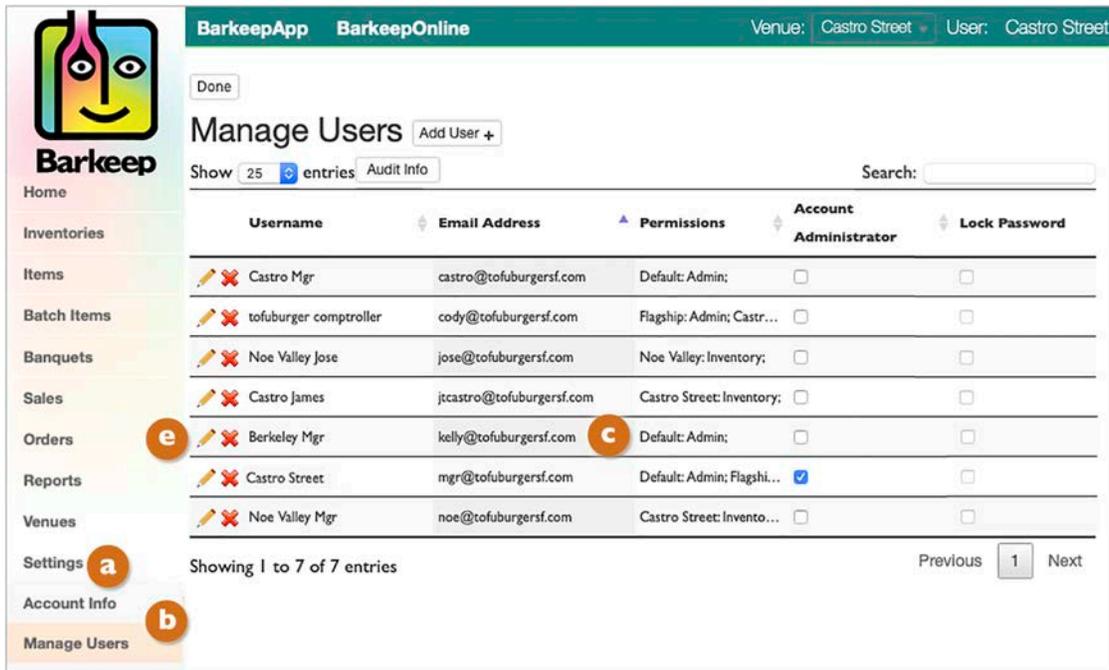
Managing Permissions

After you create a new user the next step is to review and manage the user's permissions.

By default, when you create a new user, they are given access to all your Venues and are set at the Admin level. Only an Account Administrator can modify permissions.

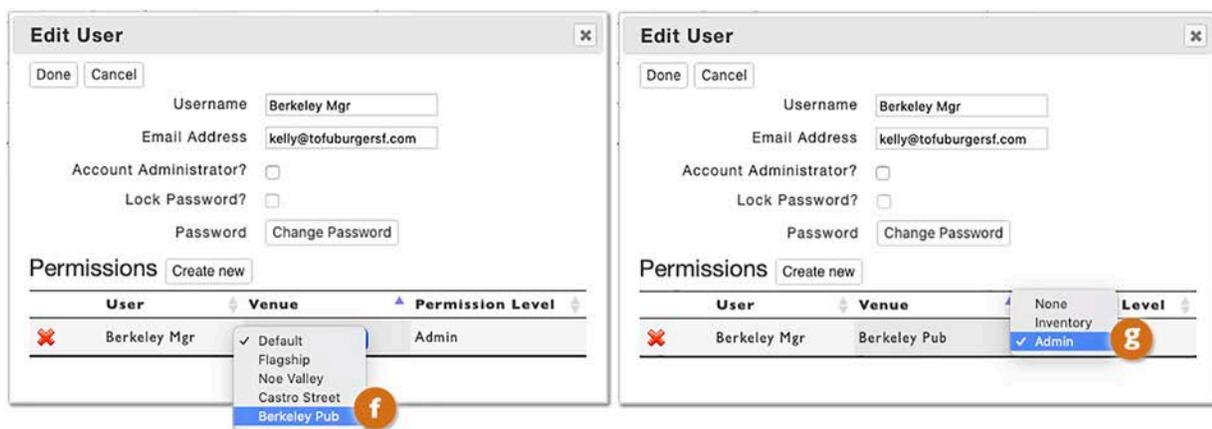
To modify the permissions for a new or existing user:

1. Log in to BarkeepOnline and choose **Settings** **a** and select **Manage Users** **b** from the menu.
2. In this example, let's look at the new user **Berkeley Mgr.** **c**
Notice how Permissions column shows Default (for all Venues) and the permission level Admin.
3. If you need to authorize users to be additional Account Administrators, **d** you can check that option.
4. On the Manage Users screen, press the pencil  next **e** to the user you wish to modify.



Username	Email Address	Permissions	Account Administrator	Lock Password
Castro Mgr	castro@tofuburgersf.com	Default: Admin;	<input type="checkbox"/>	<input type="checkbox"/>
tofurger comptroller	cody@tofuburgersf.com	Flagship: Admin; Castr...	<input type="checkbox"/>	<input type="checkbox"/>
Noe Valley Jose	jose@tofuburgersf.com	Noe Valley: Inventory;	<input type="checkbox"/>	<input type="checkbox"/>
Castro James	jtcastro@tofuburgersf.com	Castro Street: Inventory;	<input type="checkbox"/>	<input type="checkbox"/>
Berkeley Mgr	kelly@tofuburgersf.com	Default: Admin;	<input type="checkbox"/>	<input type="checkbox"/>
Castro Street	mgr@tofuburgersf.com	Default: Admin; Flagshi...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Noe Valley Mgr	noe@tofuburgersf.com	Castro Street: Invento...	<input type="checkbox"/>	<input type="checkbox"/>

5. You can select a Venue **f** for the user and also set the permission level. **g**
6. You can also add additional permissions ([see next page](#)).



User	Venue	Permission Level
Berkeley Mgr	Default	Admin

User	Venue	Level
Berkeley Mgr	Berkeley Pub	Admin

continue to next page

Adding Users – Managing Permissions (cont.)

7. You can modify **h** the user, e.g., change email, add an Account Administrator, change password, etc.
8. When you press Create New **i** you can add additional permissions for the users.
9. You can lock the password so only an Account Administrator can make changes,
10. For example, you might want the user to have access to another Venue **i** but not every Venue.

Edit User

Done Cancel

Username: Berkeley Mgr

Email Address: kelly@tofuburgersf.com

Account Administrator?

Lock Password?

Password: Change Password

Permissions Create new **i**

User	Venue	Permission Level
h Berkeley Mgr	Berkeley Pub	Admin

Edit User

Done Cancel

Username: Berkeley Mgr

Email Address: kelly@tofuburgersf.com

Account Administrator?

Lock Password?

Password: Change Password

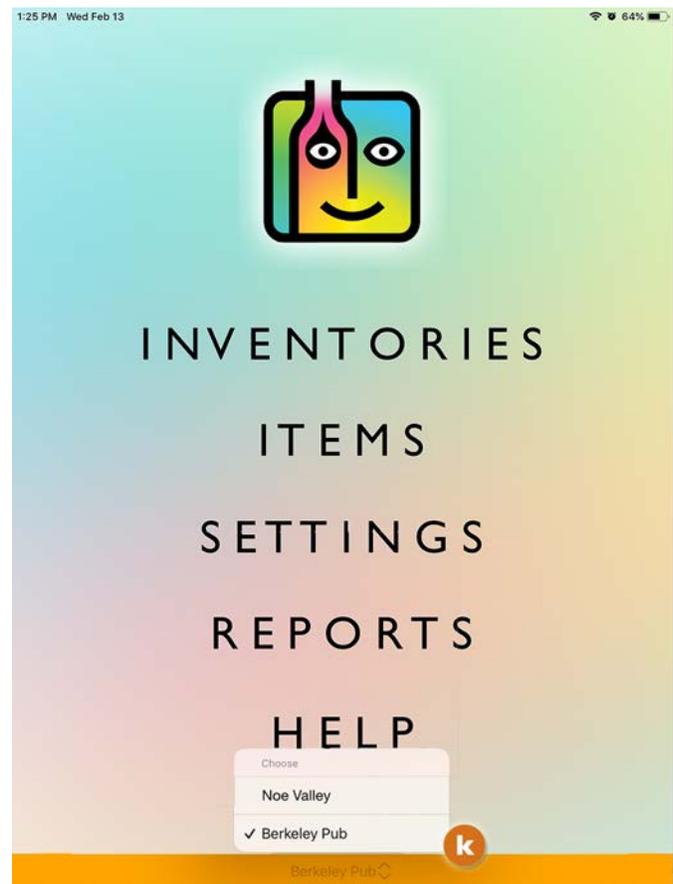
Permissions Create new

User	Venue	Permission Level
h Berkeley Mgr	Berkeley Pub	None Inventory
h Berkeley Mgr	Noe Valley i	Admin

What happens next?

11. After you make changes to a user, all of the changes will be applied to any iOS Device that is already registered by that user.
12. As soon as BarkeepApp syncs automatically, the changes are applied.

Sync Automatically
13. The user does not need to take any additional steps.
14. The example shows the iPad for the user **Berkeley Mgr**.
15. After the Account Administrator added the Venue **Noe Valley** to the permissions, it was be included as a Venue the user has access to in BarkeepApp **k** and when they sign in to BarkeepOnline with a laptop or desktop computer.



continue to next page

Adding Users – Managing Permissions (cont.)

Permission Level: Inventory

Below is an example of the user, **Castro James** — the Account Administrator has assigned the Permission Level **Inventory**. **a** The user only has access for a single Venue, **Castro Street**.

Here is what James has permission to do:

Allowed

- ✓ Use BarkeepApp to register an iOS Device with his username/password.
- ✓ Use BarkeepApp for Inventories, Usage Reports, manage Categories, Items, etc.
- ✓ When James signs in to BarkeepOnline with his username he only will see data for the one Venue.
- ✓ Access and manage **b** Inventories, Items and Banquets in BarkeepOnline.
- ✓ Run Usage Reports, Perpetual and Order Reports. **c**
- ✓ Manage Venue Settings **d** such as Categories, Locations.

Not Allowed

- Switching Venues in BarkeepApp or BarkeepOnline. **e**
- Access to Sales Items and Sales Data.
- Variance and Pour Cost Reports.

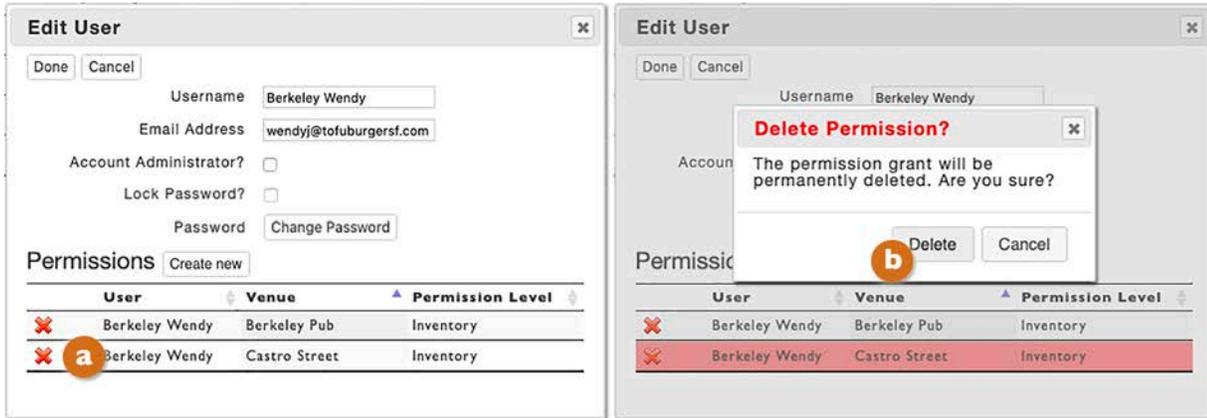
User	Venue	Permission Level
✗ Castro James	Castro Street	Inventory a

Item Name	Category	Bottle Size	Bottle Units	Price	Bottle Type	Default Case Size
Absolut	Call Vodka	l	liter	\$25.50	Bottle	12
Absolut	Call Vodka	750	ml	\$18.00	Bottle	12
Absolut Citron Vodka	Call Vodka	l	liter	\$25.50	Bottle	12
...rin Vodka	Call Vodka	l	liter	\$24.00	Bottle	12
Vodka	Call Vodka	l	liter	\$23.90	Bottle	12
...aetano	Well Liquor	l	liter	\$10.00	Bottle	12
... Domestic Bottled Beer		12	fluid oz	\$0.88	Bottle	24
... Crisp Apple	Bottled Cider	12	fluid oz	\$2.00	Bottle	24
...INAPPS - MARIL...	Top Shelf Liquor	700	ml	\$59.11	Bottle	6
... Arrow Cream de Cacao	Well Liquor	l	liter	\$7.48	Bottle	12

Deleting Permissions

When an Account Administrator needs to delete a specific permission for a user:

1. Log in to BarkeepOnline and choose **Settings** and select **Manage Users** from the menu.
2. On the Manage Users screen, press the pencil  next to the user you wish to modify.
3. Press the red  next **a** to the user permission you wish to permanently delete.
4. A pop-up will ask you to confirm your decision. **b**
5. Like all user permission changes, they will sync automatically to their registered iOS Device(s).



User Passwords

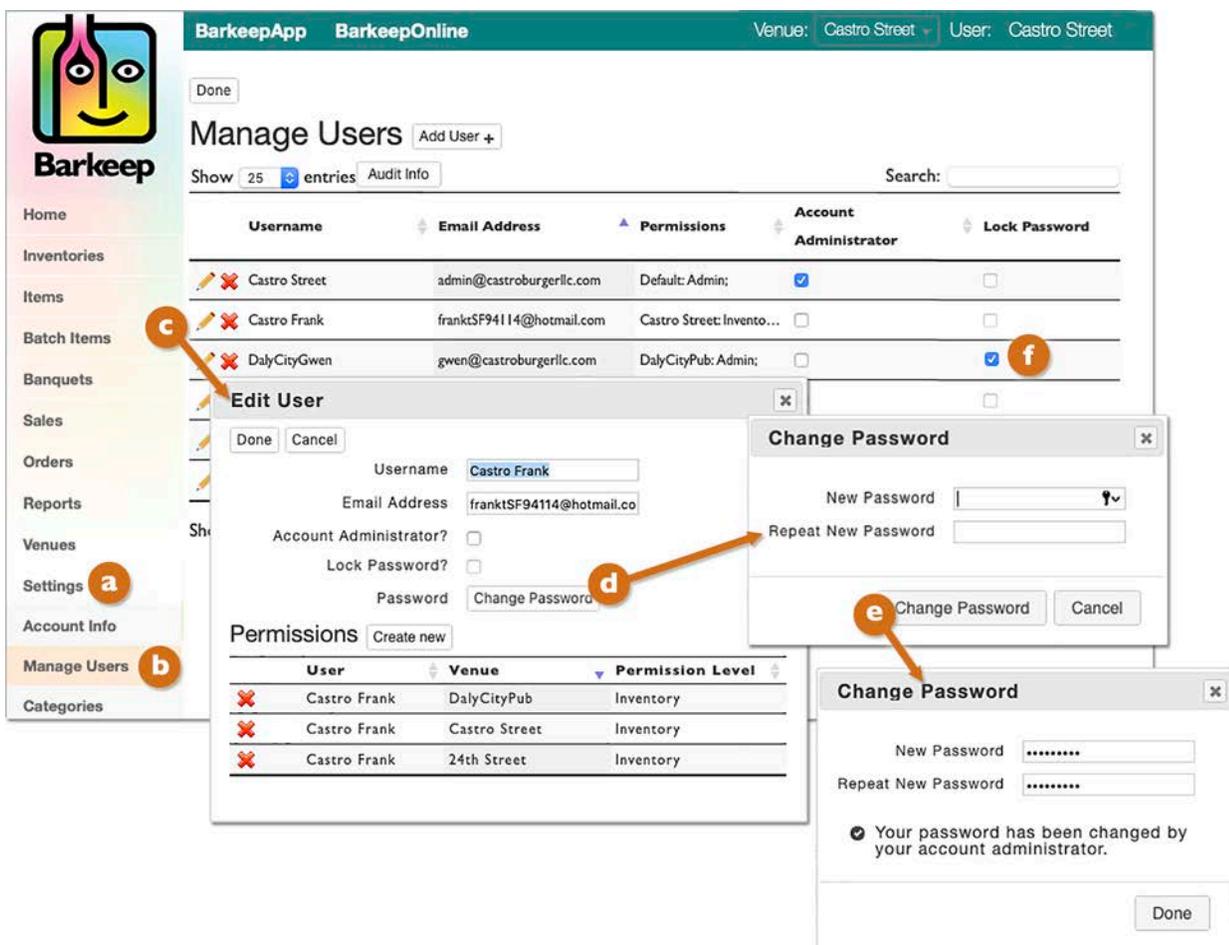
Only Account Administrators have access to passwords including the ability to lock, update and change them. When staff have password questions, they must refer to an Account Administrator.

Note: Barkeep Support can assist with passwords but can only respond to emails from Account Administrators. Barkeep Support will refer other users to their Account Administrator.

Managing Passwords

When an Account Administrator needs to change a user password:

1. Log in to BarkeepOnline and choose **Settings** **a** and select **Manage Users** **b** from the menu.
2. Press the **c** pencil  next to the user you wish to change the password for.
3. Press the **Change Password** button **d** and a new pop-up will appear where you can add a new password. You need to enter the password twice to confirm it is correct.
4. When you press the **Change Password** button in the pop-up, **e** Barkeep will indicate that the password is being updated.
5. When the process is completed, you will see a pop-up like the one shown below.
6. The next step is to press the **Done** button.
7. When a password is locked, only an Account Administrator may change it. **f**

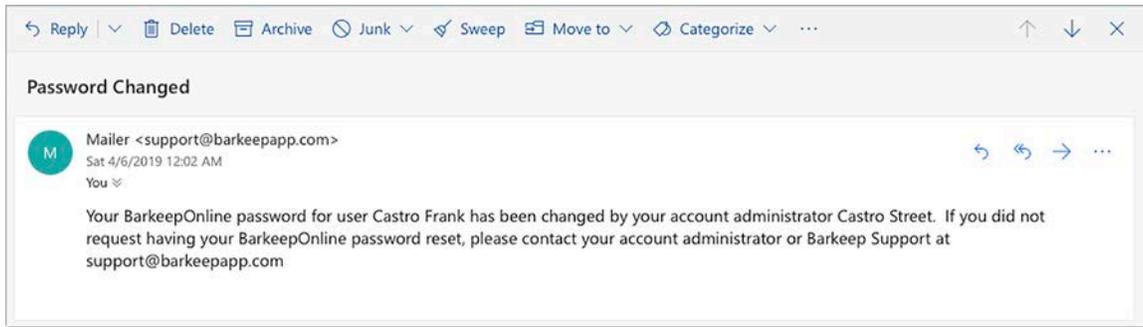


The screenshot displays the BarkeepOnline interface. On the left is a sidebar with navigation options: Home, Inventories, Items, Batch Items, Banquets, Sales, Orders, Reports, Venues, Settings (marked with 'a'), Account Info, Manage Users (marked with 'b'), and Categories. The main content area is titled 'Manage Users' and includes a search bar and a table of users. The table has columns for Username, Email Address, Permissions, Account Administrator, and Lock Password. Three users are listed: Castro Street, Castro Frank, and DalyCityGwen. The 'Castro Frank' user is selected, and an 'Edit User' pop-up is open over it. This pop-up contains fields for Username (Castro Frank), Email Address (franktSF94114@hotmail.co), Account Administrator?, Lock Password?, and Password (Change Password). Below these fields is a 'Permissions' section with a table listing permissions for 'Castro Frank' at 'DalyCityPub', 'Castro Street', and '24th Street', all with 'Inventory' permission level. A 'Change Password' pop-up is also open, showing fields for 'New Password' and 'Repeat New Password', and a 'Change Password' button (marked with 'e'). A second 'Change Password' pop-up is shown at the bottom, displaying a confirmation message: 'Your password has been changed by your account administrator.' and a 'Done' button. Orange callout letters 'a' through 'f' are placed on the interface to correspond with the steps in the text above.

continue to next page

Changing Passwords (cont.)

- An email will be sent to the user advising them their password has been changed



What happens in BarkeepApp?

After a user password is changed, any changes, Inventories, etc. made in BarkeepApp will not sync automatically to the server. After the correct, new password is added to the Settings, the iOS Device will begin syncing automatically again.

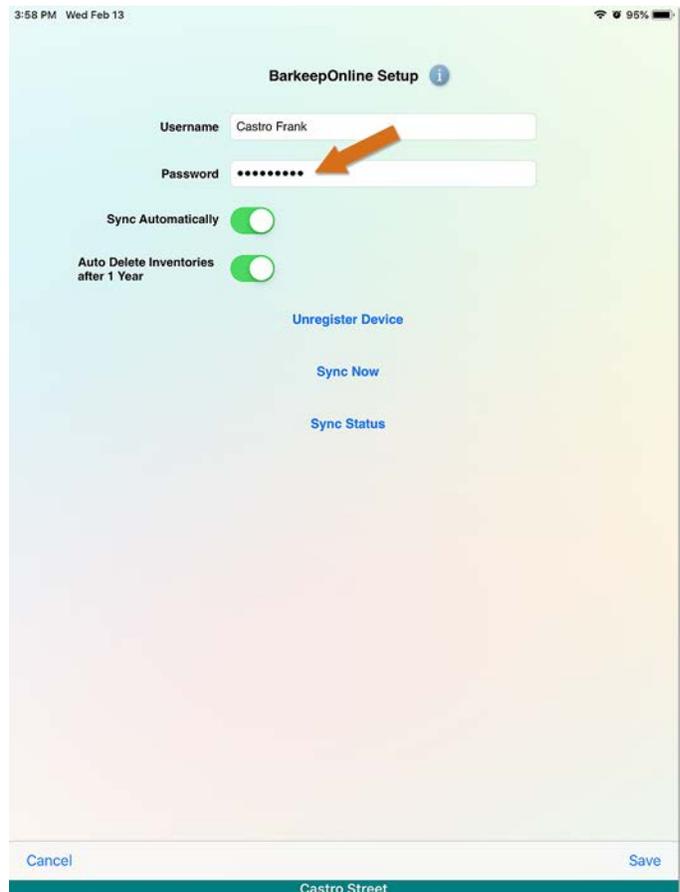
What happens in BarkeepOnline?

After a user password is changed, the user will not be able to sign in to the BarkeepOnline on their laptop or desktop computer with the old password.

Password Security Tip

After a password is entered in BarkeepApp, it always remains hidden. So, when Account Administrators and other management set up and register iOS Devices themselves, your staff will not need to know user passwords.

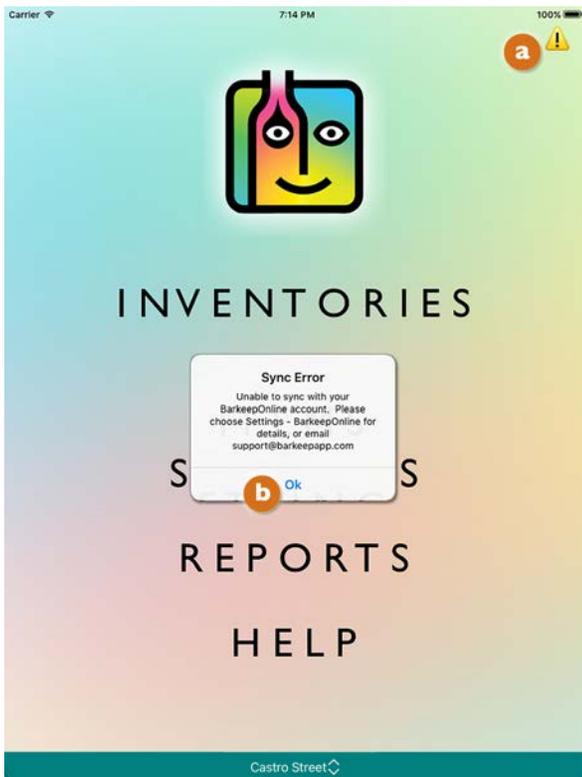
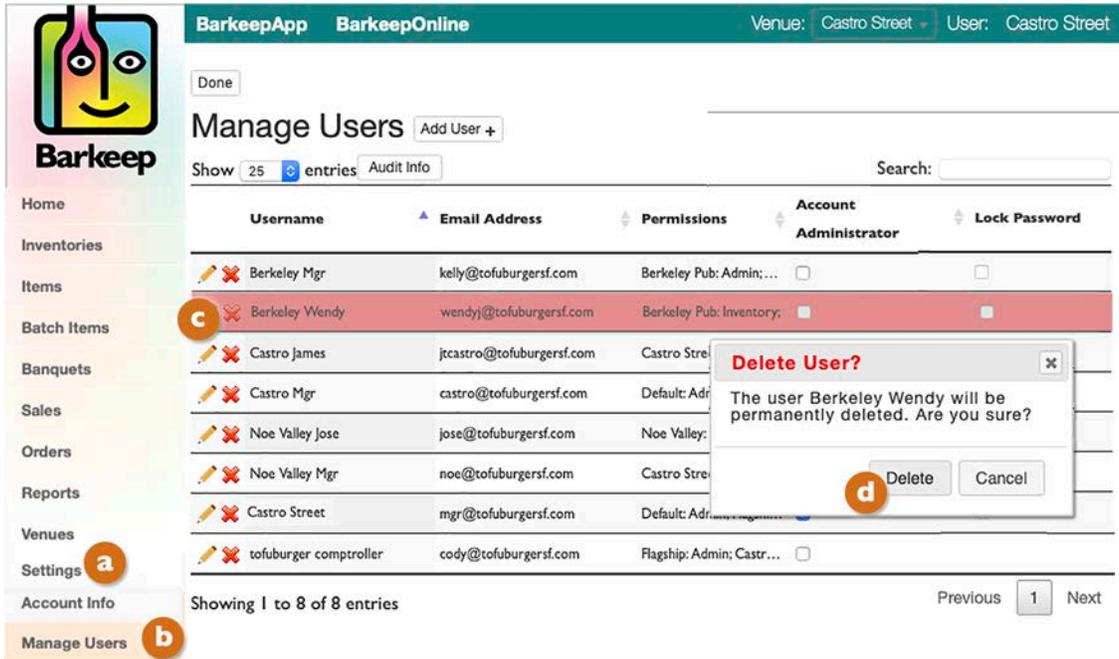
Keep in mind, without a user password, they will not be able to sign in to the BarkeepOnline.



Deleting Users

When an Account Administrator needs to delete a user:

1. Log in to BarkeepOnline and choose **Settings** **a** and select **Manage Users** **b** from the menu.
2. Press the red **X** next **c** to the user permission you wish to permanently delete.
3. A pop-up will ask you to confirm you want to delete the user. **d**



4. What happens next?

If the deleted user was registered on one of your company's iOS Devices:

- a. You will need to go to Settings in BarkeepApp and **Unregister** that iOS Device.
- b. Next, you can add a different username and password and then select **Register**.
- c. To complete the process, you must select **Copy Data from Server**.

See **Registering Devices** for more details.

5. If the staff member was using their own, personal iOS Device, BarkeepApp will remain on their Device. But any changes they make will no longer sync to your account.
6. They will also see a warning **!** icon **a** at the top of the screen. This indicates that their, iOS Device is no longer syncing. By pressing **b** the icon **!** a pop-up warning will appear explaining there is a Sync Error.
7. A deleted user will no longer be able to sign in to BarkeepOnline with their computer.

Using BarkeepApp with BarkeepPro

When using BarkeepApp synced to a BarkeepPro account, all the basic steps remain the same. Users can manage Items, Batch Items, Categories and Locations. The Inventories features have not changed, and users can run the same selection of Reports.

All the basic instructions for using BarkeepApp can be found in the [Barkeep User Guide](#).

What's the difference with BarkeepPro?

Multiple Venues

- With BarkeepPro users can access more than one Venue with the same iOS Device.
- There is no need to Unregister and Register your iOS Device to switch between BarkeepOnline accounts.
- Access to different Venues, and the permission to switch Venues is controlled by the Account Administrator(s).

Register by username instead of account user name

- With BarkeepPro you can set up individual usernames with their own passwords.
- Each username has a permission level.
- Each username has access to Venues depending on the permissions.
- When you register an iOS Device, you choose the username to register the iOS Device with.

Reminder: How it is works with a regular BarkeepOnline account

With a regular BarkeepOnline account there is only one username and one password. Everyone given access, registers their iOS Devices with that same username and password. With a regular BarkeepOnline account it is not possible to have separate permission levels. It is not possible to access Audit Trail and iOS Device activity.

Registering Devices with a BarkeepPro Account

Is this your first time registering with Barkeep?

When you are brand new to BarkeepOnline or BarkeepPro, you need to register your first iOS Device with your newly created account. This is the step when all of the existing Barkeep data in your iPhone, iPad, or iPod Touch is registered. This is when you choose to copy the data to the Barkeep Server.

If you are a beginner and registering for the first time, only then you will need to make the choice: “[Copy Data to Server](#)”.

The detailed instructions can be found in the [BarkeepOnline User Guide](#).

continue to next page

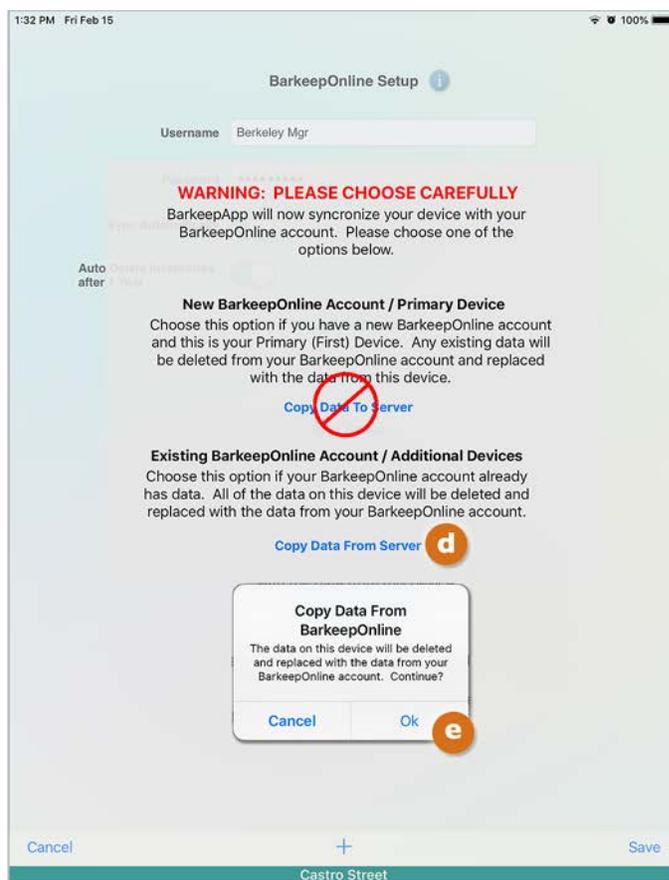
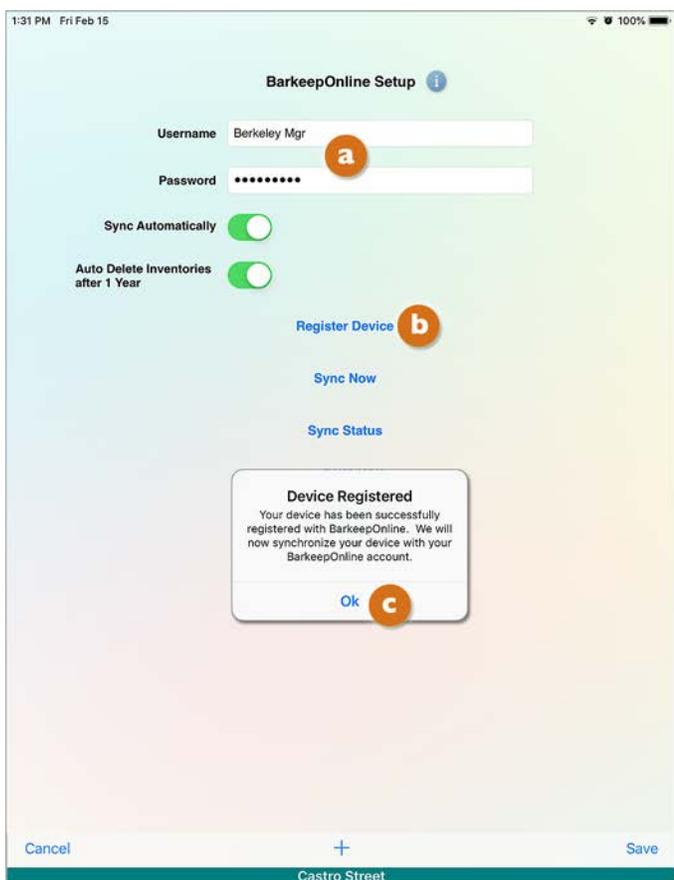
Registering Additional Devices

After you have your account set up and the first iOS Device is registered, every time you register an iOS Device you treat it as an Additional Device. The detailed instructions for registering additional Devices can be found in the [BarkeepOnline User Guide](#).

- ✓ The crucial step, after successfully registering an iOS Device, is to choose [Copy Data From Server](#).

To register an Additional Device:

1. Press Settings on the BarkeepApp Main Screen. Then choose [BarkeepOnline](#).
2. Enter the Username and Password for the user. **a**
3. Press [Register Device](#). **b**
4. If your Device is able to successfully connect to our server with the username and password that you provided, you will be presented with an alert stating that your Device has been successfully registered. Press [Ok](#). **c**
5. Choose to [Copy Data From Server](#). **d**
6. After you select [Copy Data From Server](#), you will see an alert will pop-up that asks you to confirm your choice by selecting [Ok](#). **e**
7. Wait for the data to complete copying over to the iOS Device then press [Save](#) on the bottom of the screen. This make take several minutes.



continue to next page

Frequently Asked Questions about Registration

Can you register more than one Device with the same username?

Yes. For example, your manager at your Venue in Berkeley might have an iPad they use for inventories registered with the username **Berkeley Mgr.** But they might also install BarkeepApp on their personal iPhone and register with the same username. This would allow the manager to easily monitor Barkeep activity when they are off site.

Note: Barkeep Account Administrators can review which usernames and which iOS Devices are accessing the account. See the [Audit Trail](#) section for more details.

Who should handle registering iOS Devices?

We recommend having one or two staff members that are well versed in the steps for registering with Barkeep. An inexperienced user is more likely to make mistakes which could lead to data loss.

Should I Unregister an iOS Device?

In most situations, users should never press [Unregister Device](#). See below for some exceptions.

Can you change the username that an iOS Device is registered with?

Yes. But this needs to be done with care. You would go to the BarkeepOnline Settings in BarkeepApp and begin by selecting [Unregister Device](#). You would then follow the steps on the [previous page](#) to register the iOS Device with a different username.

Can staff members share an iOS Device when each one has their own username?

Yes, but we do not recommend this. Your staff would need to unregister and register very time they handed off the iOS Device.

What happens when an *unregistered* iOS Device is used?

Do not do it! That iOS Device will not sync to your account. Any changes made will be lost when you attempt to register the Device.

What happens when the Account Administrator updates permissions?

After the changes are made, every registered iOS Device syncs automatically by default. Those changes will take place on the Devices. There is no need to go to Settings in BarkeepApp.

Additional questions?

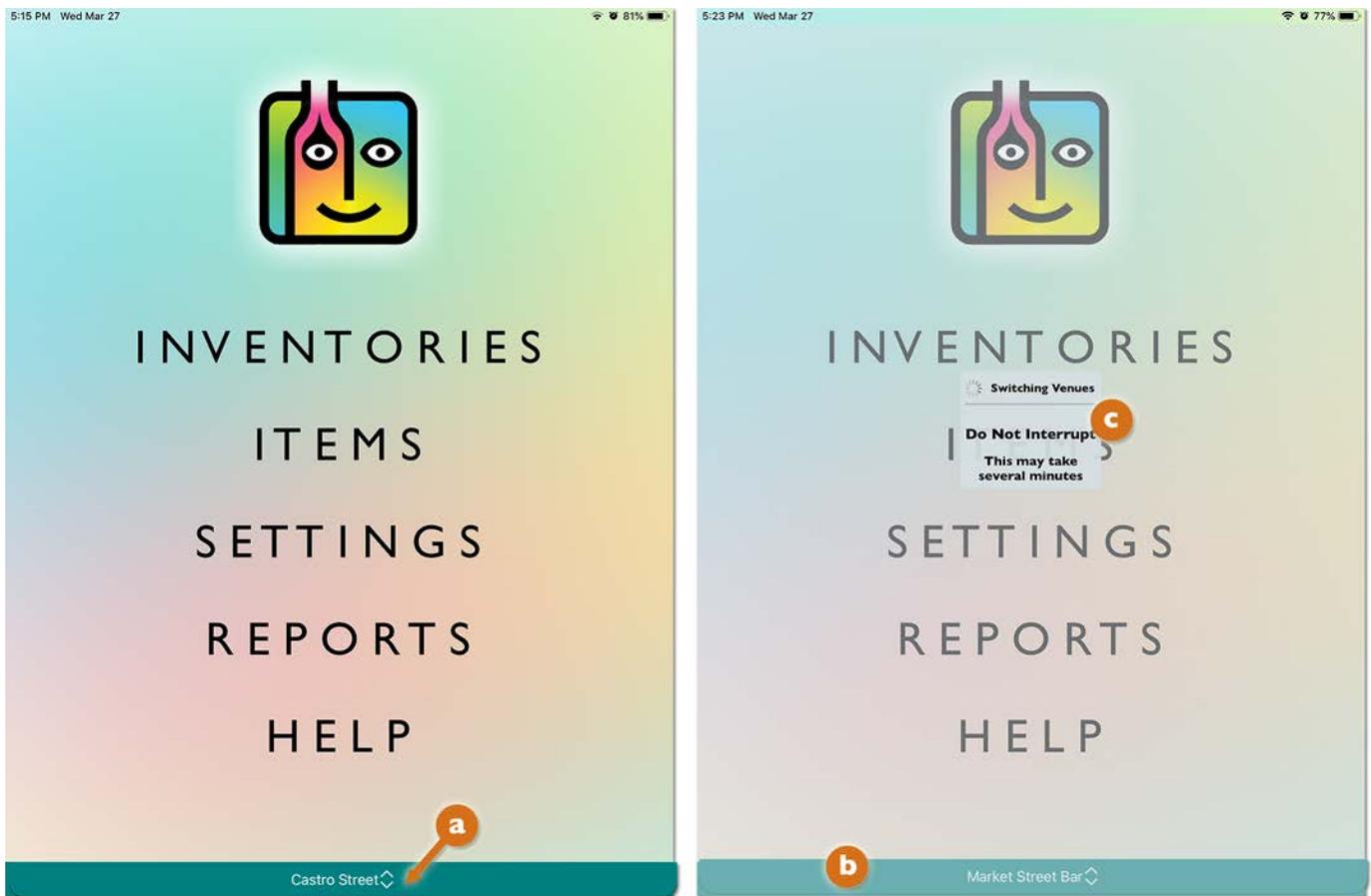
If anything is unclear about the instructions for registering Devices, do not hesitate to contact us at support@barkeepapp.com

To change Venues, see the next section [Switching Venues in BarkeepApp](#).

Switching Venues in BarkeepApp

To switch to a different Venue

1. When an **iOS** Device is registered with a BarkeepPro account, the name of the Venue you are working in will appear at the bottom of every screen. **a** Also note, the color you set for the Venue in BarkeepOnline will also appear in BarkeepApp.
2. To switch Venues, you must return to the Main Screen **b** where a pop-up menu will appear listing all the Venues authorized for the user with this **iOS** Device.
3. After you select a Venue, wait a moment. **c**
BarkeepApp will verify that all your changes in the first Venue have synced and will then sync the second Venue with any updated changes to your **iOS** Device.
Note: If you have large sets of data and/or multiple staff members accessing your BarkeepPro account, this might take a minute or two. It also depends on the speed of your Wi-Fi network and internet connection.
4. You will be able to access the second Venue after the syncing process is completed.



Note: Users will only be able to switch to Venues that the Account Administrator has given permission to access. If you are not able to switch to a Venue, please see your Account Administrator for assistance.

Managing your Data with BarkeepApp

Who can make changes?

Modifying your Barkeep data with BarkeepApp works the same with BarkeepPro. All authorized staff members can create Inventories, count and add Items to Inventories and modify those Inventories as needed. They can add and modify Categories, Items, Locations, etc.

Does a change in one Venue happen in all Venues?

No. Any changes you make in BarkeepApp are only for that Venue. For example, if you add an Item, change an Item price add or modify a Category, etc. This change only happens for that Venue.

Syncing

By default, Sync Automatically is turned on in BarkeepApp (we recommend leaving it turned on). All of your changes will sync to the Venue in the BarkeepPro account on our server and to all the **iOS** Devices you have registered to the Venue.⁶

Data Syncing and Switching Venues

When you switch Venues, BarkeepApp will verify that all your changes in the first Venue have synced and then will copy and sync the second Venue, with any updated changes, to your **iOS** Device.

BarkeepPro will only sync Inventories to your **iOS** Device that are less than 365 days from the Inventory Date. Older Inventories remain in in your account and can be accessed by signing in to BarkeepOnline.

Data Storage with BarkeepPro

With BarkeepPro, when you use a single **iOS** Device for multiple Venues, the data for the current Venue you are logged in with is the data stored on your **iOS** Device.

Do you have enough space on your iOS Device?

When BarkeepPro users are managing Multiple Venues, we recommend using **iOS** Devices with greater storage capacity. If you are using an **iOS** Device(s) dedicated to Barkeep, we recommend removing unnecessary apps and/or using your **iOS** Device's Storage Setting to offload unused apps.

⁶ You must have a reliable network connection for syncing.

BarkeepApp Settings for BarkeepPro

Settings on an iOS Device

When you use BarkeepApp on any iOS Device synced to a BarkeepPro account, the General Settings, Report Settings, Banquet activation, Bluetooth Scale pairing, etc. that are set up for that iOS Device are the same for every Venue you access with that Device. For example, with your iOS Device, the weight formats you choose will be the same for all Venues.

Can different iOS Devices have different Settings?

Yes, if for any reason, you need different settings on different Devices, you are able to do that. That said, we recommend using the same configuration on all your registered Devices if possible.

Tip: Make sure your staff have configured the iOS Device they are using correctly

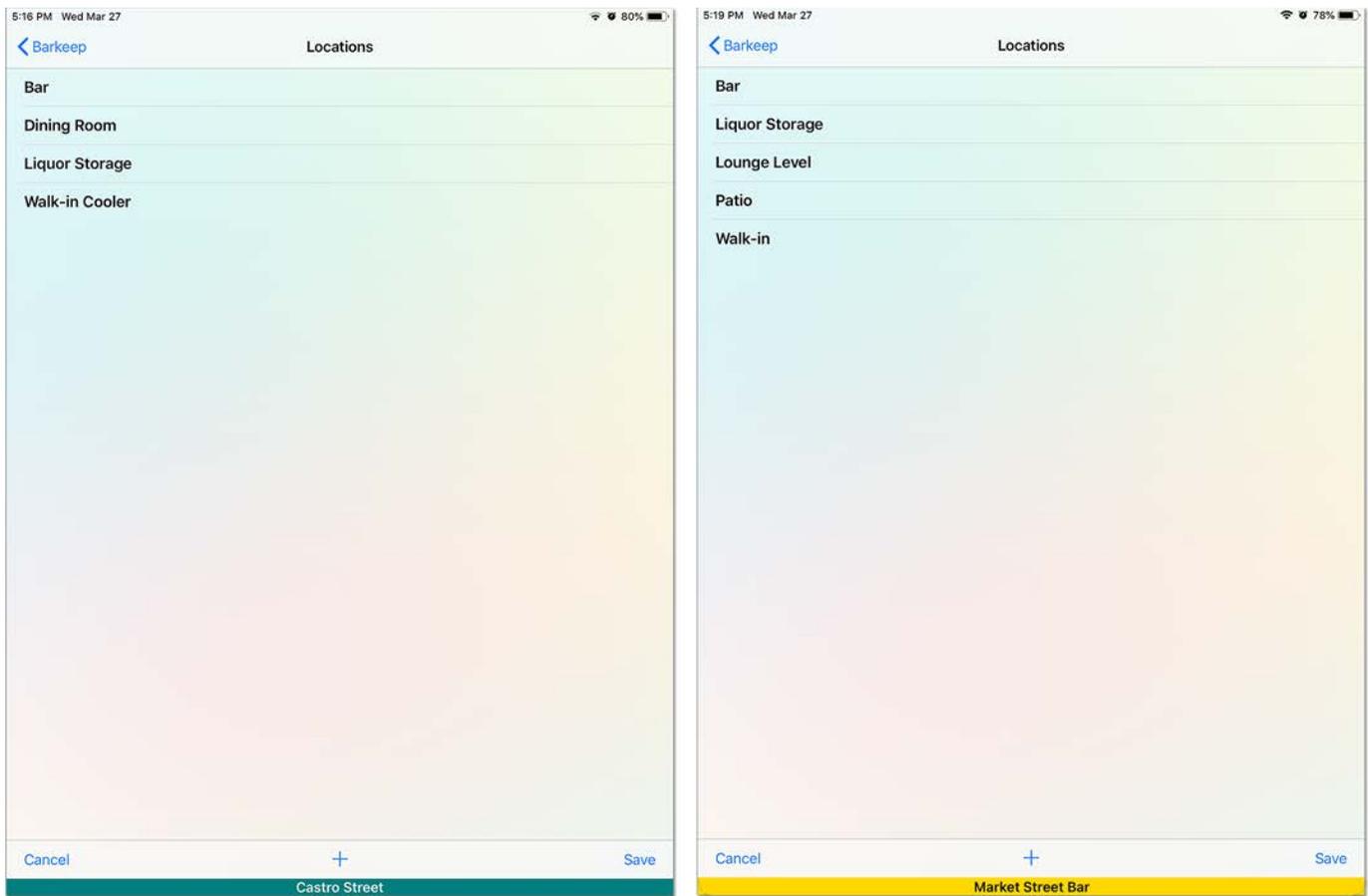
We recommend that the BarkeepPro Admin review the settings on each iOS Device to make sure it is configured correctly.

Venue Specific Settings – Categories, Items, Locations and Supplier Settings

These settings are specific to each Venue. Any changes or additions you make in BarkeepApp to these settings will sync to the Barkeep Server and all Devices registered with the Venue.

One iPad – Two Venues

The example below shows the same iPad but notice the Locations are different for each Venue



Audit Trail Feature/Track Users

With a BarkeepPro Audit Trail⁷, you have the ability to track users by username and when iOS Devices access your account. The Audit Trail can be used to monitor activity with all your Venues. It can be crucial when trying to pinpoint staff errors when using Barkeep. Only an Account Administrator or staff with Admin permissions have access to the feature.

When an Account Administrator or Admin log in to the account, they can get username tracking for the following:

Inventories
Items
Banquets

Categories
Locations
Suppliers

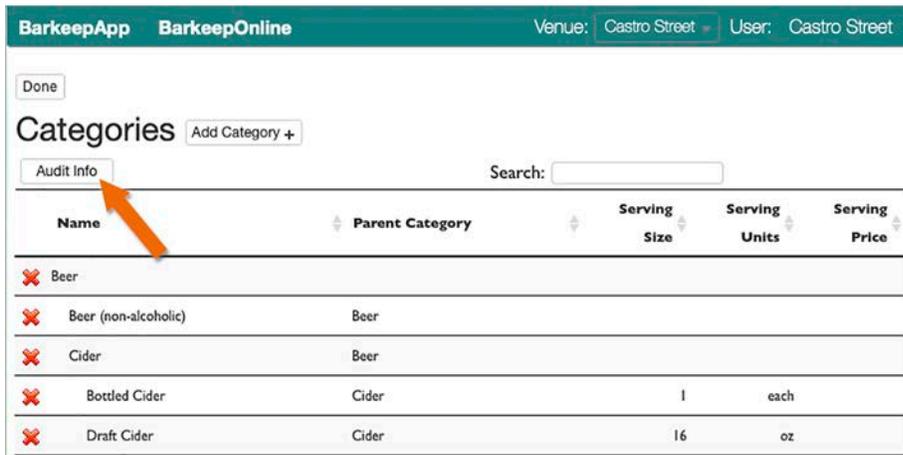
The Account Administrator(s) can also track changes to:

Venues

Manage Users

The Audit Trail will show the date and time of creation of the Inventory, Item, Category, etc. It also will show the most recent date and time when an update occurred. For each entry you will see either a username when the action occurred while logged in to the account online or the name of the registered iOS Device that created or updated using BarkeepApp.

To access Audit information, simply press the button. This will update the window and add columns with the Audit Trail details to right of the data.



Note: The Audit Trail feature was introduced with Barkeep 6.0. Changes made prior to the introduction of v6.0 version will not be tracked.

continue to next page for more detailed instructions

⁷ The Audit Trail Feature is only available when you sign in to your BarkeepOnline account. You cannot access the feature with BarkeepApp.

Audit Trail Feature/Track Users (cont.)

Audit Trail for Items

To review the Audit Trail and changes to your Items, do the following:

1. Log in to BarkeepOnline.
2. Choose the section you wish to review, i.e., **Items**, and select it **a** from the menu.
3. When you press the **Show/Hide** button **b** a pop-up menu will appear where you can select the additional columns of data that will appear on screen in your Items list.
4. Select the **Audit Info** button **c**
(The Audit option is only available for Account Administrators and Admins).
5. Your list will now appear with the additional columns. **d**
You may need to scroll to the right depending on your screen size.
6. Notice the Audit columns **e**

Created **Created By** **Updated** **Updated By**

7. **Created By** and **Updated By** will show either the iOS Device that was used with BarkeepApp or the username signed in when the changes were made with BarkeepOnline.
8. You can sort the columns, **f** for example, to see the most recent updates.
9. Below you can see when the new Item **Angry Orchard Green Apple** was added and when it was updated by the user **Castro Mgr**.

The screenshot displays the BarkeepOnline interface. At the top, it shows 'BarkeepApp BarkeepOnline' and 'Venue: Castro Street User: Castro Street'. The main area is titled 'Items' and includes buttons for 'Add Item +', 'Update Item Weights', and 'Download Items'. A 'Show/Hide' button (b) is highlighted, and its menu is open, showing 'Audit Info' (c) selected. Below this, a table of items is shown with columns for 'Item Name', 'Category', 'Bottle Size', 'Bottle Units', 'Price', 'Bottle Type', and 'Default Case Size'. A second table below shows the audit trail with columns for 'Item Name', 'Category', 'Bottle Size', 'Case Size', 'Created', 'Created By', 'Updated', and 'Updated By' (d, e, f). The 'Updated By' column for 'Angry Orchard Green Apple' is circled, showing 'Castro Mgr'.

Item Name	Category	Bottle Size	Bottle Units	Price	Bottle Type	Default Case Size
Absolut	Call Vodka	1	liter	\$22.00	Bottle	12
Absolut Cit		1	liter	\$25.50	Bottle	12
Absolut Ma		1	liter	\$24.00	Bottle	12
Absolut Va		1	liter	\$23.90	Bottle	12
Amaretto Di Gaetano	Well Liquor	1	liter	\$10.00	Bottle	12
Amstel Light	Domestic Bottled Beer	12	fluid oz	\$0.88	Bottle	24
Angry Orchard Crisp Apple	Bottled Cider	12	fluid oz	\$2.00	Bottle	24
Angry Orchard Green Apple	Bottled Cider	1	each	\$0.00	Bottle	12
APRICOT SCHNAPPS - MARIL...	Tem. Schnap. Liqueur	700	ml	\$59.11	Bottle	6

Item Name	Category	Bottle Size	Case Size	Created	Created By	Updated	Updated By
Angry Orchard Green Apple	Bottled Cider	1	12	03/20/2019 4:16 pm	(iPad) Castro 1's iPad	03/20/2019 5:07 pm	Castro Mgr
Absolut	Call Vodka	1	12	02/08/2019 10:52 am	(iPhone) Alejo's iPhone	02/14/2019 4:32 pm	(iPhone) Alejo's iPhone
Crystal Geyser Sparkling Mine...	Water/Soda	1	24	02/08/2019 10:52 am	Castro Alejo	02/13/2019 3:17 pm	Castro Alejo
Crystal Geyser Alpine Spring ...	Water/Soda	1	24	02/08/2019 10:52 am	Castro Mgr	02/13/2019 3:16 pm	Castro Mgr
Crystal Geyser Lemon	Water/Soda	1	24	02/13/2019 2:55 pm	Castro Alejo	02/13/2019 3:16 pm	Castro Alejo
Crystal Geyser Lime	Water/Soda	1	24	02/13/2019 3:15 pm	Castro Mgr	02/13/2019 3:16 pm	Castro Mgr

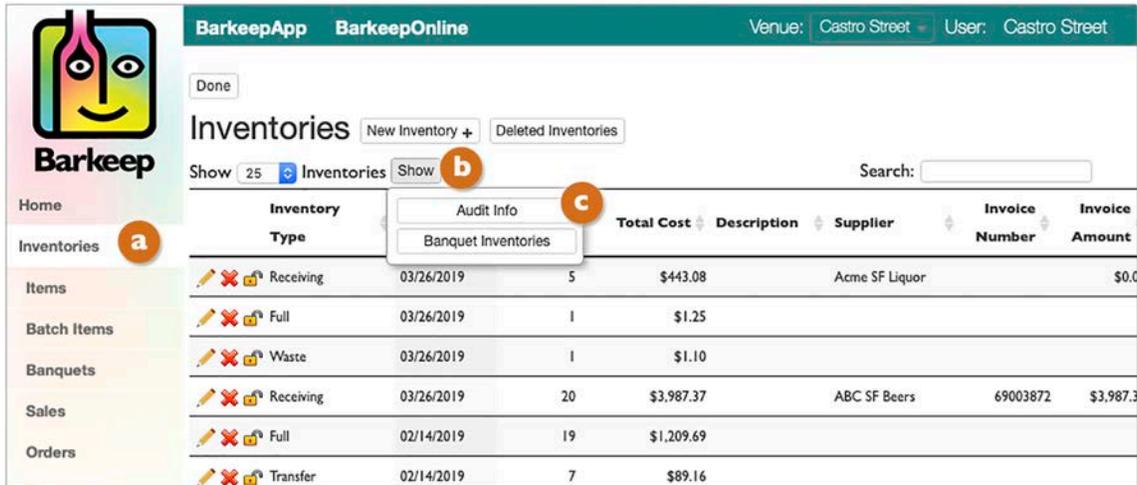
continue to next page

Audit Trail Feature/Track Users (cont.)

Audit Trail for Inventories

To review the Audit Trail and changes to your Inventories, do the following:

1. Log in to BarkeepOnline and choose **Inventories** **a** from the menu.
2. Press Show **b** and select the button. **c**
3. Your list will now appear with the additional columns displaying when each Inventory was created, updated, etc. (as shown on **previous page**).



Inventory Type	Date	Quantity	Total Cost	Description	Supplier	Invoice Number	Invoice Amount
Receiving	03/26/2019	5	\$443.08		Acme SF Liquor		\$0.0
Full	03/26/2019	1	\$1.25				
Waste	03/26/2019	1	\$1.10				
Receiving	03/26/2019	20	\$3,987.37		ABC SF Beers	69003872	\$3,987.3
Full	02/14/2019	19	\$1,209.69				
Transfer	02/14/2019	7	\$89.16				

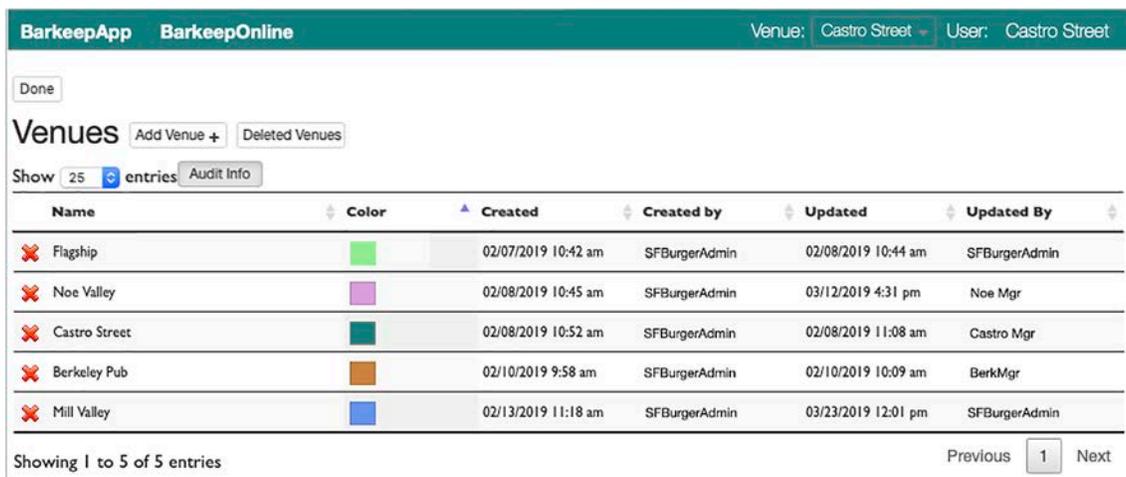
Audit Trail for Banquets

With Banquets you can review the Audit Trail at two levels. When the Banquets were created and updated as well the Audit information for each individual Banquet Inventory.

Audit Trail for Venues and changes to Users

Account Administrators can review the Audit Trail for changes to Venues and users when they choose **Venues** or **Manage Users** from the menu and then press the button.

This can be useful when there is more than one authorized Account Administrator for an account, for example, other members of your management team.



Name	Color	Created	Created by	Updated	Updated By
Flagship	Green	02/07/2019 10:42 am	SFBurgerAdmin	02/08/2019 10:44 am	SFBurgerAdmin
Noe Valley	Purple	02/08/2019 10:45 am	SFBurgerAdmin	03/12/2019 4:31 pm	Noe Mgr
Castro Street	Teal	02/08/2019 10:52 am	SFBurgerAdmin	02/08/2019 11:08 am	Castro Mgr
Berkeley Pub	Brown	02/10/2019 9:58 am	SFBurgerAdmin	02/10/2019 10:09 am	BerkMgr
Mill Valley	Blue	02/13/2019 11:18 am	SFBurgerAdmin	03/23/2019 12:01 pm	SFBurgerAdmin

continue to next page

Audit Trail Feature/Track Users (cont.)

Tracking Devices

In addition to Audit Info, an Account Administrator can also review the **iOS** Devices registered with an account. To review the Devices, do the following:

1. Log in to BarkeepOnline.
2. Choose **Settings** **a** and select **Account Info** **b** from the dropdown menu.
3. Press the **Show Devices** button **c** and a new screen will show your Account Devices. **d**
4. You will see the Device Type, Device Name, Username, when the **iOS** Device was registered and when it most recently synced with the Barkeep Server.
5. You can sort the list with the arrows at the top of each column. **e**
6. When you see the same Device with different Usernames, **f** in this example **Castro 2's iPad**, it is because one user, **Castro Mgr**, unregistered the **iPad** and then it was registered with another user, **Castro James**.

The screenshot shows the BarkeepOnline interface. On the left is a navigation menu with 'Settings' (a) and 'Account Info' (b) highlighted. The 'Account Info' section shows fields for Business Name, Email Address, Renewal Date, and Username. Below it is the 'Account Devices' table. The table has columns for Device Type, Device Name, Username, Date Registered, and Last Sync Date. A 'Show Devices' button (c) is visible. A search bar is at the top right of the table. A red arrow (f) points to the 'Castro 2's iPad' entry, which is listed with two different usernames: 'Castro James' and 'Castro Mgr'.

Device Type	Device Name	Username	Date Registered	Last Sync Date
iPad	Castro 3's iPad	Castro Alejo	03/20/2019 4:07 pm	03/21/2019 9:50 pm
iPad	Castro 1's iPad	Castro Mgr	03/20/2019 3:48 pm	03/20/2019 4:06 pm
iPad	Castro 2's iPad	Castro James	02/15/2019 1:31 pm	03/20/2019 3:47 pm
iPhone	Allie's iPhone	Castro Allie	02/14/2019 4:54 pm	02/15/2019 1:31 pm
iPhone	Greg Baker's iPhone	Berkeley Mgr	02/14/2019 4:47 pm	02/14/2019 4:47 pm
iPad	Castro 3's iPad	Castro Alejo	02/14/2019 4:41 pm	02/14/2019 4:45 pm
iPad	Castro 3's iPad	Castro Alejo	02/14/2019 4:39 pm	02/14/2019 4:40 pm
iPad	Castro 2's iPad	Castro James	02/14/2019 4:30 pm	02/14/2019 4:38 pm
iPhone	Castro 2's iPad	Castro Mgr	02/13/2019 10:26 pm	02/14/2019 4:29 pm
iPad	Castro 1's iPad	Castro Mgr	02/13/2019 2:46 pm	02/13/2019 10:24 pm

How can I remove a registered iOS Device from my account?

If, you no longer wish to allow an **iOS** Device to have access to your BarkeepPro account, you would need to go into BarkeepApp on that Device, select Settings and then **Unregister**.

But we don't have the iOS Device?

If the **iOS** Device is not in your possession, for example the personal **iPhone** of a former employee, then you need to go to log in and select **Manage Users** to delete their username or change the password for that username. The existing data and BarkeepApp would remain on the former employee's **iPhone**, but they will no longer have access to your account.

See the **Deleting Users** section for more details.

BarkeepPro Reports

In addition to the Reports that are exclusive for BarkeepPro subscribers, you can run all the same Reports you would with BarkeepOnline, and the steps are the same. Using BarkeepApp, you also have the same report capability.

If you need to review Report instructions, you can find the details in the [BarkeepOnline User Guide](#).

Multiple Venues and Report Settings

When you first add a new Venue, you have the opportunity to copy the Report Settings and Sales Items from an existing Venue. Keep in mind, any changes you make to the Report Settings for a Venue, will be unique for that Venue. If needed, you different Venues can have different Report Settings.

See the [Copying Venue Data](#) section.

Variance Report by Location

BarkeepPro includes an exclusive feature where you can run Variance reports by Location. With this option, you can focus in on specific Locations and review their Actual Usage (Inventories) versus Expected Usage (Sales Data). This option will help you survey individual Locations and the employees who staff them. For example, when you are concerned about issues with an individual bartender, a Variance Report by Location might help you get to the source of any problems.

Reminder: To run Reports that are organized by Location, Transfer Inventories are crucial. See the [Barkeep User Guide](#) to review Transfer Inventory instructions.

The instructions for running a Variance Report by Location are identical to running any Variance Report. The [BarkeepOnline User Guide](#) has details explaining the other options as well as how to choose a Start and End Inventory correctly. To run a Variance Report by Location, do the following:

1. Log in to BarkeepOnline. Choose **Reports** and select **Variance Report** from the dropdown menu.
2. Choose a Start Inventory and End Inventory.
3. Select Group by Location. a
4. Press the Run Report button and your Variance Report will appear on the screen.

BarkeepApp BarkeepOnline Venue: Market Street Bar

Variance Report Done

Start Inventory Full Inventory 07/17/2018 227 Items Include Sales data from 7/17/2018

End Inventory Full Inventory 08/06/2018 224 Items Include Sales data from 8/6/2018

Use Default Item Price? Show Oz? Show Retail Value?

Exclude Banquets? Show Liters? Fit to Window Width?

Show Pricing Details? Show Servings? Group by Location? a

Your Variance Report will contain all Sales Data where both the Sales Start Date and the Sales End Date are between 7/17/2018 and 8/5/2018

Run Report Download Report

Variance Summary | Variance Details | Sales Data | Used Details | Sold Details

Sales	\$31,519.85	Cost	\$4,317.32	Pour Cost	13.7%
Liquor Cost	\$4,317.32	Ideal Cost	\$4,863.16	Ideal Pour Cost	15.43%
Rating	112.64%	Over/Short (Cost)	-\$545.84	% Over/Short	-11.22%

Category	Sales	Used	Sold	Over / Short	Cost	Ideal Cost	Over / Short (Cost)
Beer	\$16,261.85	1,505	1,500.8	4.3	\$2,340.27	\$3,153.90	\$-813.63
Liquor	\$15,120.00	141.4	137.6	3.7	\$1,753.27	\$1,666.34	\$86.93
Non-Alcoholic/Mixers	\$0.00	108	0	108	\$179.28	\$0.00	\$179.28
Wine	\$138.00	6	5.8	0.2	\$44.50	\$42.92	\$1.58
Total	\$31,519.85	1,760.4	1,644.2	116.2	\$4,317.32	\$4,863.16	\$-545.84

Showing 1 to 5 of 5 entries

5. You can also select the Download Report button to review and manage your Variance Report in an Excel spreadsheet.

Note: When you run a Variance Report and select Group by Location, your spreadsheet will also separate out each Location in the Variance Details.

continue to next page

Variance Report by Location (cont.)

After you run a Variance Report by Location notice that the Variance Summary displays your Locations **b** instead of your Categories (see below).

Variance Report Done

Start Inventory: Full Inventory 07/17/2018 227 Items Include Sales data from 7/17/2018

End Inventory: Full Inventory 08/06/2018 224 Items Include Sales data from 8/6/2018

Use Default Item Price? Show Oz? Show Retail Value?

Exclude Banquets? Show Liters? Fit to Window Width?

Show Pricing Details? Show Servings? Group by Location?

Your Variance Report will contain all Sales Data where both the Sales Start Date and the Sales End Date are between 7/17/2018 and 8/5/2018

Run Report Download Report

Variance Summary | Variance Details | Sales Data | Used Details | Sold Details

Sales	\$31,519.85	Cost	\$4,317.37	Pour Cost	13.7%
Liquor Cost	\$4,317.37	Ideal Cost	\$4,865.46	Ideal Pour Cost	15.44%
Ratio	112.69%	Over/Short (Cost)	-\$548.09	% Over/Short	-11.26%

Location	Sales	Used	Sold	Over / Short	Cost	Ideal Cost	Over / Short (Cost)	Pour Cost	Ideal Pour Cost
Bar 1	\$18,315.55	978.5	968.4	10.1	\$2,085.04	\$2,564.74	\$-479.70	11.38%	14%
Bar 2	\$10,278.20	404.9	391.6	13.2	\$1,655.93	\$1,830.27	\$-174.34	16.11%	17.81%
Bar 3	\$2,926.10	295	284	11.1	\$440.88	\$470.45	\$-29.57	15.07%	16.08%
Store Room	\$0.00	82	0	82	\$136.12	\$0.00	\$136.12	0%	0%
Walk-in Cooler	\$0.00	0	0	0	\$-0.60	\$0.00	\$-0.60	0%	0%
Total	\$31,519.85	1,760.4	1,644	116.4	\$4,317.37	\$4,865.46	\$-548.09	13.7%	15.44%

Showing 1 to 6 of 6 entries

The Variance Details will show each Location. **c** The Sales column displays totals that are specific for each Item by Location. **d** The Used count **e** is also for the specific Location and the Ideal Used count is based on Sales Data for that Location.⁸

Variance Summary | **Variance Details** | Sales Data | Used Details | Sold Details

Item	Sales	Used	Ideal Used	Over / Short	Cost	Ideal Cost	Over / Short (Cost)	Pour Cost	Ideal Pour Cost
Bar 1									
Beer									
Cider									
Bottled Cider									
Angry Orchard Crisp Apple	\$750.00	150	150	0	\$300.00	\$300.00	\$0.00	40%	40%
Wyder's Pear Cider	\$270.15	51	51	0	\$145.35	\$145.35	\$0.00	53.8%	53.8%
Total Bottled Cider	\$1,020.15	201	201	0	\$445.35	\$445.35	\$0.00	43.66%	43.66%
Draft Cider									
Wyder's Draft Pear Cider	\$770.00	0.9	0.8	0.1	\$80.75	\$74.31	\$6.44	10.49%	9.65%
Total Draft Cider	\$770.00	0.9	0.8	0.1	\$80.75	\$74.31	\$6.44	10.49%	9.65%
Total Cider	\$1,790.15	201.9	201.8	0.1	\$526.10	\$519.66	\$6.44	29.39%	29.03%
Domestic Bottled Beer									
Amstel Light	\$240.00	48	48	0	\$42.31	\$42.31	\$0.00	17.63%	17.63%
Anchor Steam Beer	\$422.00	48	48	0	\$52.80	\$52.80	\$0.00	12.51%	12.51%
Bud Light	\$260.00	69	65	4	\$51.75	\$48.75	\$3.00	19.9%	18.75%
Budweiser	\$229.00	46	46	0	\$34.50	\$34.50	\$0.00	15.07%	15.07%
Michelob Ultra	\$147.00	30	30	0	\$24.00	\$24.00	\$0.00	16.33%	16.33%
Miller Genuine Draft	\$360.00	76	76	0	\$59.28	\$59.28	\$0.00	16.47%	16.47%
Miller Lite	\$100.00	20	20	0	\$15.60	\$15.60	\$0.00	15.6%	15.6%
Rolling Rock	\$725.00	156	156	0	\$117.00	\$117.00	\$0.00	16.14%	16.14%
Total Domestic Bottled Beer	\$2,483.00	493	489	4	\$397.24	\$394.24	\$3.00	16%	15.88%

continue to next page

⁸ See next section for uploading Sales Data by Location.

Variance Report by Location (cont.)

When you select the Sales Data tab **f** you will also see your Sales Count and Total Sales **g** by Location.

Variance Summary | Variance Details **f** | Sales Data | Used Details | Sold Details

Show 25 entries Search:

Item	Sales Item	Sales Count	Average Price	Total Sales
Bar 1				
Beer				
Cider				
Bottled Cider				
Angry Orchard Crisp Apple	Angry Orchard	150	\$5.00	\$750.00
Total Angry Orchard Crisp Apple		150	\$5.00	\$750.00
Wyder's Pear Cider	Wyders Bottle	51	\$5.30	\$270.15
Total Wyder's Pear Cider		51	\$5.30	\$270.15
All Items	Hard Cider		\$0.00	\$0.00
Total Bottled Cider		201	\$5.08	\$1,020.15
Draft Cider				

When you select the Used Details tab **h** you will also see a summary of the Inventories factored into the Variance Report by Location and Item. This includes all the Transfer Inventories. **i**

Variance Summary | Variance Details | Sales Data | **Used Details** | Sold Details

Item	Start	Rec	Waste	Transfers	End	End Value	Used	
Bar 1								
Beer								
Cider								
Bottled Cider								
Angry Orchard Crisp Apple 12oz	11	0	0	144	5	\$10.00	150	
Wyder's Pear Cider 12oz	5	0	0	50	4	\$11.40	51	
Total Bottled Cider		16	0	0	194	9	\$21.40	201
Draft Cider								
Wyder's Draft Pear Cider 15.5gal	0.2	1	0	0	0.4	\$33.25	0.9	
Total Draft Cider		0.2	1	0	0	\$33.25	0.9	
Total Cider		16.2	1	0	194	9.4	\$54.65	201.9
Domestic Bottled Beer								
Amstel Light 12oz	6	0	0	62	20	\$17.50	48	
Anchor Steam Beer 12oz	0	0	0	48	0	\$0.00	48	
Bud Light 12oz	6	0	6	72	3	\$2.25	69	
Budweiser 12oz	6	0	0	45	5	\$3.75	46	
Michelob Ultra 12oz	6	0	0	24	0	\$0.00	30	
Miller Genuine Draft 12oz	6	0	0	72	2	\$1.56	76	
Miller Lite 12oz	6	0	0	24	10	\$7.80	20	
Rolling Rock 12oz	8	0	0	162	14	\$10.50	156	
Total Domestic Bottled Beer		44	0	6	509	54	\$43.36	493

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Variance Report by Location (cont.)

Can you have a Variance Report by Location *without* Sales Data by Location?

Yes, but when you look at the Variance Details, you will only get Sales and Ideal Used figures in the totals at the bottom of the Report. Notice there are not Sales Totals **j** and Ideal Used **k** counts in the Variance Details.

Note: If you do not upload Sales Data by Location, we recommend not using the Group by Location feature for a Variance Report. Instead, to review activity by Location, we recommend a Usage Report by Location.

Variance Report Done

Start Inventory: Full Inventory 01/22/2018 109 Items Include Sales data from 1/22/2018

End Inventory: Full Inventory 02/13/2018 104 Items Include Sales data from 2/13/2018

Use Default Item Price? Show Oz? Show Retail Value?

Exclude Banquets? Show Liters? Fit to Window Width?

Show Pricing Details? Show Servings? Group by Location?

Your Variance Report will contain all Sales Data where both the Sales Start Date and the Sales End Date are between 1/22/2018 and 2/12/2018

Run Report Download Report

Variance Summary | **Variance Details** | Sales Data | Used Details | Sold Details

Search:

Item	Sales	Used	Ideal Used	Over / Short	Cost	Ideal Cost	Over / Short (Cost)	Pour Cost	Ideal Pour Cost
Bar 1									
Beer									
Domestic Bottled Beer									
Amstel Light	\$0.00	7	0	7	\$6.16	\$0.00	\$6.16	0%	0%
Bud Light	\$0.00	9	0	9	\$6.75	\$0.00	\$6.75	0%	0%
Budweiser	\$0.00	12	0	12	\$10.20	\$0.00	\$10.20	0%	0%
Miller Genuine Draft	\$0.00	2	0	2	\$1.56	\$0.00	\$1.56	0%	0%
Miller Lite	\$0.00	10	0	10	\$7.80	\$0.00	\$7.80	0%	0%
Rolling Rock	\$0.00	11	0	11	\$8.25	\$0.00	\$8.25	0%	0%
Total Domestic Bottled Beer	\$0.00	51	0	51	\$40.72	\$0.00	\$40.72	0%	0%

The next section has instructions for entering and uploading Sales Data by Location.

Sales Data with BarkeepPro

Sales Data by Location

BarkeepPro includes a feature where you can enter Sales Data and specify Location(s). If you wish to run a Variance Report by Location ([see previous section](#)) you will also need to manage your Sales Data by Location.

Is my POS System compatible?

In order to take advantage of this feature, you must have a POS System that can separate out Sales Data by Location and/or individual terminal. You may need to contact your POS System provider for instructions on how to export Sales Data in this way. You also can email a spreadsheet to support@barkeepapp.com and we will review the spreadsheet to make sure it will upload correctly to your BarkeepOnline account.

Barkeep Locations vs. POS System Locations

When you run a Variance Report by Location, the Locations are the ones you set up in Barkeep. If you plan to compare Inventory and Sales Data in a Variance Report by Location, your POS System's Locations must correspond to the ones you use in Barkeep. For example, if your Barkeep Locations are separate rooms in your Venue and each room is a Location in your POS System with its own Sales Data, it should work fine. But, if your exported Sales Data Locations do not match your Barkeep Locations, you will not be able to run effective Variance Reports by Location. Of course, you can still run Variance Reports, but the "Group by Location" option will not produce accurate results.

Entering Sales Data

In BarkeepOnline, when you enter Sales Data, you can upload the Sales Data from a spreadsheet, or you can enter it manually. When you enter or upload Sales Data by Location the steps are basically the same with the added steps of specifying a Location(s). All the detailed instructions for entering Sales Data can be found in the [BarkeepOnline User Guide](#). On the following pages are the extra instructions you will need for specifying Locations.

Can different Locations in my Venue have different Sales Items?

Yes. We have some users with large Venues where they have multiple Locations where the beverage offerings can vary. For example, users with Barkeep Locations that include separate bars and a restaurant in the same building. When you upload Sales Data, the key is that every Location has a spreadsheet formatted the same way. It is crucial, that every Sales Item has a unique Sales Item Name or Sales Item Number (depending if you match by name or number).

[continue to next page](#)

Sales Data by Location (cont.)

Sales Data Spreadsheet with Locations

When you upload your Sales Data and want to add a Location you have two options.

- Upload a spreadsheet that includes a column with Location information.
- Upload separate spreadsheets with Sales Data for each Location.

Sales Upload Preferences

If your spreadsheet has Location information, your first step is to check your **Sales Upload Preferences**. **a**
Please note the following requirements:

- Your preferences must designate a Location column.⁹ **b**
- The Location names in your spreadsheet must be an exact match for the ones you created in Barkeep.
- If your POS System cannot export a spreadsheet with Location information, you would need to edit the spreadsheet and add the Locations before uploading to BarkeepOnline.

Sales Item Number	Sales Item Name	Sales Count	Total Sales \$	Location Column
A	B	C	D	E

Note: If you have any questions regarding the suitability of your spreadsheet and/or how to configure your Sales Data Upload settings, please contact support at support@barkeepapp.com and include a copy of your spreadsheet in the email.

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⁹ The Location feature for Sales Data uploads is only available to BarkeepPro subscribers.

Sales Data by Location (cont.)

Uploading Sales Data

After you have reviewed and set your preferences, you are ready to upload your Sales Data. The steps are the same with or without Locations. For detailed instructions see the [BarkeepOnline User Guide](#), below is a quick review:

1. Log in to BarkeepOnline. Choose **Sales** **a** and select **Upload Sales Data** or press the **Upload Sales Data** button. **b**
2. Press the **Choose File** button to select the file containing your Sales Data from your laptop or desktop computer
3. As soon as you choose the file from your computer, Barkeep will upload the spreadsheet and automatically take you to a screen containing your newly uploaded data.
4. Next set the “Sales Start Date” **c** and the “Sales End Date” for your Sales Data.
5. Your uploaded Sales Data will take the Locations directly from the spreadsheet and they will appear in the Location column (see below).

The screenshot shows the BarkeepOnline interface. On the left is a sidebar with navigation options: Home, Inventories, Items, Batch Items, Banquets, Sales, Sales Data (highlighted with a red 'a'), Upload Sales Data, Manually Enter Sales Data, and Manage Sales. The main content area has a 'Sales' header with buttons for 'Upload Sales Data' (highlighted with a red 'b'), 'Manually Enter Sales Data', and 'Download Sales Template'. Below the header are filters for 'Show 25 entries' and a search box. A 'Sales' summary section contains fields for 'Sales Start Date' (01/21/2019, highlighted with a red 'c'), 'Sales End Date' (01/27/2019), 'Sales Count' (3,604), 'Sales Amount' (\$20,728.47), 'Notes', and 'Description'. Below this is a 'Sales Data' section with an 'Add Sales Item +' button, 'Show 25 entries', and a search box. A table displays the sales data with columns: Sales Item Number, Sales Item Name, Location, Sales Count, and Sales Amount. The 'Location' column is circled in red. The table contains six rows of data, each with a red 'X' in the first column.

Sales Item Number	Sales Item Name	Location	Sales Count	Sales Amount
X 1	Domestic Bottled Beer	Bar 1	327	\$917.50
X 1	Domestic Bottled Beer	Bar 2	10	\$50.00
X 1	Domestic Bottled Beer	Green Lounge	88	\$244.00
X 2	Domestic Draft	Bar 1	326	\$930.00
X 2	Domestic Draft	Bar 2	20	\$60.00

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Uploading Sales Data by Location

This is the method to use when you upload Sales Data with separate spreadsheets for each Location.

1. Log in to BarkeepOnline. Choose **Sales** **a** or select **Upload Sales Data**.
2. After pressing the **Upload Sales Data** button **b** a pop-up will appear.
3. Select a single Location from the drop-down menu. **c**
4. Press the **Choose File** button and select the file containing your Sales Data from your laptop or desktop computer

BarkeepApp BarkeepOnline

Done

Sales **Upload Sales Data** **Manually Enter Sales Data** **Download Sales Template**

Show 25 entries Search:

	Start Date	End Date	Sales Count	Sales \$Amt	Notes
Inventories	01/02/2019	01/16/2019	1,092	\$8,920.45	
Items	12/24/2018	01/01/2019	1,490	\$10,162.00	
Batch Items	12/03/2018	12/23/2018			
Banquets	11/05/2018	12/02/2018			
Sales	08/06/2018	08/26/2018			
Sales Data a	07/17/2018	08/05/2018			
Upload Sales Data b	06/28/2018	06/29/2018	110	\$892.00	
Manually Enter	05/07/2018	05/13/2018	3,529	\$23,126.60	
Sales Data	04/23/2018	05/06/2018	14,921	\$110,347.05	
Manage Sales	04/09/2018	04/22/2018	127	\$1,016.00	

Upload Sales Data

Choose File no file selected

Location **c**

- Bar 1
- Bar 2
- Bar 3
- Cart
- Green Lounge
- Oceanview Ballroom
- Oceanview Veranda
- Patio Lounge
- Store Room
- Walk-in Cooler

5. Barkeep will upload the spreadsheet and automatically take you to a screen containing your newly uploaded data. Notice how there is a Location column **d** for your Sales Data.
Note: If you do not choose a Location for the upload, the Location column will remain empty. You can manually add Locations for each Sales Item if needed.
6. On this screen, set the “Sales Start Date” **e** and the “Sales End Date” for your Sales Data.
7. We recommend adding the Location to the notes. **f**
8. Press the **Done** button on the top of the screen to save your Sales Data.

Done Save Cancel

Sales **First** **Previous** **Next** **Last** **Delete**

Sales Start Date 01/17/2019 **e**

Sales End Date 01/21/2019

Sales Count 2,010

Sales Amount \$10,907.70

Notes Bar 1 Sales Data **f**

Description

Sales Data **Add Sales Item** +

Show 25 entries Search:

Sales Item Number	Sales Item Name	Location d	Sales Count	Sales \$Amount
432	Fat Tire Draft	Bar 1	100	\$908.00
433	HH Fat Tire Draft	Bar 1	24	\$200.00
434	Chimay Blue Label	Bar 1		

continue to next page

Sales Data by Location (cont.)

BarkeepApp BarkeepOnline

Done

Sales Upload Sales Data Manually Enter Sales Data Download Sales Template

Show 25 entries Search:

	Start Date	End Date	Sales Count	Sales \$Amt	Notes	Description
	01/17/2019	01/21/2019	2,010	\$10,907.70	Bar 1 Sales Data	
	01/17/2019	01/21/2019	554	\$3,421.25	Bar 2 Sales Data	
	01/02/2019	01/16/2019	1,092	\$8,920.45		
	12/24/2018	01/01/2019	1,490	\$10,162.00		
	12/03/2018	12/23/2018	1,980	\$16,017.00		

9. The example above shows your list of Sales Data after uploading two different spreadsheets with Sales Data for the same set of dates. **g** The first was for your Location **Bar 1** and the second for **Bar 2**.
10. By adding optional notes **h** it will be easier to review and manage your list of Sales Data.
11. You are now ready to run a Variance Report by Location.

BarkeepApp BarkeepOnline

Venue: Market Street Bar

Variance Report Done

Start Inventory Full Inventory 01/17/2019 185 Items Include Sales data from 1/17/2019

End Inventory Full Inventory 01/22/2019 193 Items Include Sales data from 1/22/2019

Use Default Item Price? Show Oz? Show Retail Value?

Exclude Banquets? Show Liters? Fit to Window Width?

Show Pricing Details? Show Servings? **Group by Location?**

Your Variance Report will contain all Sales Data where both the Sales Start Date and the Sales End Date are between 1/17/2019 and 1/21/2019

Run Report Download Report

Variance Summary | Variance Details | Sales Data | Used Details | Sold Details

Sales	\$14,328.95	Cost	\$9,603.48	Pour Cost	67.02%
Liquor Cost	\$9,603.48	Ideal Cost	\$2,684.54	Ideal Pour Cost	18.74%
Rating	27.95%	Over/Short (Cost)	\$6,918.94	% Over/Short	257.73%

Location	Sales	Used	Sold	Over / Short	Cost	Ideal Cost	Over / Short (Cost)	Pour Cost
Bar 1	\$10,907.70	725.4	688.6	36.8	\$2,051.52	\$2,132.24	\$-80.72	18.81%
Bar 2	\$3,421.25	122.8	122.4	0.3	\$522.80	\$552.30	\$-29.50	15.28%
Bar 3	\$0.00	25	0	25	\$22.56	\$0.00	\$22.56	0%
Store Room	\$0.00	342.5	0	342.5	\$1,546.31	\$0.00	\$1,546.31	0%
Walk-in Cooler	\$0.00	3,134	0	3,134	\$5,460.29	\$0.00	\$5,460.29	0%
Total	\$14,328.95	4,349.7	811	1,538.7	\$9,603.48	\$2,684.54	\$6,918.94	67.02%

Showing 1 to 6 of 6 entries

Tip: If you upload your Sales Data in separate spreadsheets for each Location, to help manage the spreadsheet files, we suggest naming them in a way you can easily identify which POS Location they are associated with. This will save time and prevent errors when uploading.

continue to next page

Sales Data by Location (cont.)

Manual entering Sales Data by Location

1. The steps for manually entering Sales Data are the same, with the exception that you specify a Location(s).
2. Log in to BarkeepOnline. Choose **Sales** and select **Manually Enter Sales Data**. **a** Or, you can press the button at the top of the screen. **b**
3. A pop-up will appear where you can choose a single Location **c** from the menu.

The screenshot shows the BarkeepOnline interface. On the left is a navigation menu with 'Sales Data' highlighted. The main area shows a 'Sales' summary table with columns for Start Date, End Date, Sales Count, Sales \$Amt, Notes, and Description. A 'Manually Enter Sales Data' button is circled in orange with a 'b'. A pop-up window titled 'Choose Location(s) For Your Sales Data' is open, showing three options: 'No Location Specified', 'All Locations', and 'Choose a Location'. The 'Choose a Location' option is selected, and a dropdown menu shows a list of locations with 'Bar 1' circled in orange with a 'c'.

4. After you choose a Location you will see a screen where you can set the Sales Start and End Date, add notes, etc. **d**
5. Below you will see a line for every Sales Item and a column for Location. **e** Because you chose **Bar 1**, the Location is automatically entered. (You can change the Location for any individual entry).

The screenshot shows the 'Sales' entry form. At the top, there are navigation buttons: First, Previous, Next, Last, and Delete. Below are input fields for Sales Start Date (01/28/2019), Sales End Date (01/29/2019), Sales Count (0), Sales Amount (\$0.00), Notes, and Description. The 'Sales End Date' field is circled in orange with a 'd'. Below the form is a 'Sales Data' section with an 'Add Sales Item +' button. A table shows the sales items with columns for Sales Item Number, Sales Item Name, Location, Sales Count, and Sales \$Amount. The first row shows 'Domestic Bottled Beer' at 'Bar 1' with a sales count of 18. The 'Bar 1' location is circled in orange with an 'e'.

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Manual entering Sales Data by Location (cont.)

No Location Specified

If you do not select a Location, as shown on the previous page, your Sales Data will not have Locations entered in the Location column (see below). You can use the pop-up menu to specify a Location for each Sales Item. This step needs to be done separately for each Sales Item.

Note You can manually enter Sales Data without entering a Location, but you will not be able to run an effective Variance Report with the Group by Location option.

Sales First Previous Next Last Delete

Sales Start Date: 01/28/2019
Sales End Date: 01/29/2019
Sales Count: 18
Sales Amount: \$90.00
Notes:
Description:

Sales Data Add Sales Item +

Show 25 entries Search:

Sales Item Number	Sales Item Name	Location	Sales Count	Sales \$Amount
1	Domestic Bottled Beer	Bar 1	18	\$90.00
2	Domestic Draft	<div style="border: 1px solid gray; padding: 2px;"><input checked="" type="checkbox"/> Bar 1 <input type="checkbox"/> Bar 2 <input type="checkbox"/> Bar 3 <input type="checkbox"/> Cart <input type="checkbox"/> Green Lounge <input type="checkbox"/> Oceanview Ballroom <input type="checkbox"/> Oceanview Veranda <input type="checkbox"/> Patio Lounge <input type="checkbox"/> Store Room <input type="checkbox"/> Walk-in Cooler</div>		
3	Imported Bottled Beer			
4	Imported Draft			
5	Premium Bottled			
6	Premium Draft			
7	Hard Cider			
8	Well			

All Locations

If you select All Locations, your Sales Data will have a separate entry for every Sales Item and every Location (see below).

Sales First Previous Next Last Delete

Sales Start Date: 01/28/2019
Sales End Date: 01/29/2019
Sales Count: 43
Sales Amount: \$215.00
Notes:
Description:

Sales Data Add Sales Item +

Show 25 entries Search:

Sales Item Number	Sales Item Name	Location	Sales Count	Sales \$Amount
1	Domestic Bottled Beer	Bar 1	18	\$90.00
1	Domestic Bottled Beer	Bar 2	11	\$55.00
1	Domestic Bottled Beer	Bar 3	14	\$70.00
1	Domestic Bottled Beer	Cart		
1	Domestic Bottled Beer	Green Lounge		
1	Domestic Bottled Beer	Oceanview Ballroom		

continue to next page

Sales Data by Location (cont.)

Organizing Your Sales Data

If you are uploading multiple spreadsheets by Location, a single spreadsheet with all your Locations, or entering your Sales Data manually, it is important to keep your Sales Data organized. We recommend establishing your own system for how you organize and handle your Sales Data and also to keep it consistent.

This section offers an overview of factors to keep in mind when organizing your Sales Data.

How Barkeep calculates a Variance Report

Inventories

When you run a Variance Report, you must choose a Start Inventory and an End Inventory. The Start and End are always chosen from your entire list of Full Inventories. You might choose last week's Full Inventory as your Start Inventory and this week's Full Inventory **a** as the End Inventory. Or, you might want to run a Variance Report over a larger period of time. The second example **b** shows a Start Inventory on 10/15/18 and an End Inventory on 1/22/19.

Variance Report Done

Start Inventory: Full Inventory 01/15/2019 185 Items Include Sales data from 1/15/2019 **a**

End Inventory: Full Inventory 01/22/2019 193 Items Include Sales data from 1/22/2019

Use Default Item Price? Show Oz? Show Retail Value?

Exclude Banquets? Show Liters? Fit to Window Width?

Show Pricing Details? Show Servings? Group by Location?

Your Variance Report will contain all Sales Data where both the Sales Start Date and the Sales End Date are between 1/15/2019 and 1/21/2019

Run Report Download Report

Variance Report Done

Start Inventory: Full Inventory 10/15/2018 195 Items Include Sales data from 10/15/2018 **b**

End Inventory: Full Inventory 01/22/2019 193 Items Include Sales data from 1/22/2019

Use Default Item Price? Show Oz? Show Retail Value?

Exclude Banquets? Show Liters? Fit to Window Width?

Show Pricing Details? Show Servings? Group by Location?

Your Variance Report will contain all Sales Data where both the Sales Start Date and the Sales End Date are between 10/15/2018 and 1/21/2019

Run Report Download Report

When Barkeep calculates your Variance Report it factors in every Receiving, Return, Transfer and Waste Inventory for the selected time period. But Barkeep disregards all the Full Inventories that are in between the Start and End Inventory.

Sales Data

When you run a Variance Report, Barkeep factors in the following Sales Data:

- All the Sales Data that falls between the Start and End Inventories. This includes multiple uploads that fall within the time period.
- You have the option to include Sales Data from the date of your Start Inventory and End Inventory.
- Barkeep does not factor in Sales Data that overlaps the Start or End dates. In the example above, Barkeep would not factor in Sales Data with the dates 1/20/19 to 1/25/19, because your End Inventory has a date of 1/22/19.

The [BarkeepOnline User Guide](#) has further details regarding choosing dates for all Reports as well as Sales Data,

continue to next page

Organizing Your Sales Data (cont.)

Sales Data List

Below is an example set of Sales Data. Let's review the details:

- The user does a Full Inventory every Monday morning.
- They have three Locations where they serve customers, **Station 1**, **Station 2** and **Lounge**.
- They upload three Sales Data spreadsheets every week, one for each Location.
- The manager carefully tracks when they restock the bars and they enter Transfer Inventories every time they move Items in the club.
- The **Lounge** Location is only open on Friday and Saturday nights. Note that Sales Data for the **Lounge** has dates covering just two days. But, because the dates fall between the Start and End Inventories, the Sales Data will correctly be factored in to the Variance Report.

Sales						
Upload Sales Data		Manually Enter Sales Data		Download Sales Template		
Show	25	entries	Search: <input type="text"/>			
Start Date	End Date	Sales Count	Sales \$Amt	Notes	Description	
01/25/2019	01/26/2019	214	\$1,478.00	Lounge		
01/21/2019	01/27/2019	627	\$4,283.00	Station 2		
01/21/2019	01/27/2019	1,589	\$10,852.87	Station 1		
01/18/2019	01/19/2019	108	\$744.00	Lounge		
01/14/2019	01/20/2019	483	\$3,288.50	Station 2		
01/14/2019	01/20/2019	1,729	\$11,823.00	Station 1		
01/11/2019	01/06/2019	161	\$1,108.20	Lounge		
01/07/2019	01/13/2019	390	\$2,289.00	Station 2		
01/07/2019	01/13/2019	2,109	\$13,218.75	Station 1		

They do a regular Full Inventory each week, and systematically upload Sales Data. This means they can run a Variance Report and include all the Locations, even though they uploaded Sales Data in three, separate spreadsheets. And, of course, they can also run a Variance Report with the Group by Location option.

If this user had uploaded the same Sales Data with one spreadsheet, but their spreadsheet had a Location column, they would also have the same options and results for their Variance Report.

Can you upload Sales Data every day?

Yes. Barkeep is flexible, and if it is ideal for you to do a separate Sales Data upload for each business day, you can upload your Sales Data that way. Then, when you run Variance Reports based on a week, month, etc., Barkeep will factor in all of the uploads between your Start and End Inventories. But the key is consistency, and you would need to do a Sales Data upload for every day your business is open.

continue to next page

Organizing Your Sales Data (cont.)

Overlapping Sales Data

Below is the same set of Sales Data as on the previous page, but with an additional upload.

Here is what happened:

Because the manager was concerned about issues in the Location **Station 2**, a Full Inventory of just that Location was done on the morning of Thursday 1/17 and again, the next day on Friday 1/18.

Sales Data was then uploaded for **Station 2** for the one day, Thursday, 1/17. The manager then could run a Variance Report and focus on one Location on one day.

Here is where there could be a problem, let's look at the details:

- The Sales Data list includes the **Station 2** Sales Data **c** for 1/17/19.
- The next week, Sales Data for **Station 2** for the dates 1/14 to 1/20/19 was uploaded. **d** This would include the Sales Data for 1/17 as part of the totals.
- After running the 1/17 Variance Report and resolving issues with **Station 2**, the manager did not delete that one day's Sales Data upload.
- During the next week, when more Variance Reports will be run, the numbers will be off because Barkeep will include all the Sales Data uploaded that falls between the Start and End Inventory – or in other words, you will have the figures for 1/17/19 for **Station 2**, included twice in your Variance Report.

Sales						
Upload Sales Data		Manually Enter Sales Data		Download Sales Template		
Show	25	entries	Search: <input type="text"/>			
Start Date	End Date	Sales Count	Sales \$Amt	Notes	Description	
01/25/2019	01/26/2019	214	\$1,478.00	Lounge		
01/21/2019	01/27/2019	627	\$4,283.00	Station 2		
01/21/2019	01/27/2019	1,589	\$10,852.87	Station 1		
01/18/2019	01/19/2019	108	\$744.00	Lounge		
01/17/2019	01/17/2019	c 117	\$708.20	Station 2	spot check	
01/14/2019	01/20/2019	d 483	\$3,288.50	Station 2		
01/14/2019	01/20/2019	1,729	\$11,823.00	Station 1		

The Solution

In this situation, after the manager had run and reviewed the one-day Variance Report, it would have been best to delete that upload of Sales Data. At some point, if the report was needed again, the Sales Data could be re-uploaded. We recommend organizing, naming and keeping your Sales Data spreadsheet files on your computer, for instances when you might need them in the future.

Copying Sales Items

How to Download Sales Item from one Venue and upload them to a different Venue

When you first add a new Venue, you can copy the Sales Items from an existing Venue. Or, if you prefer, you can download the Sales Items from one Venue and then upload them to a different Venue. To copy over Sales Items, follow these steps:

1. Log in to BarkeepOnline and/or select the Venue from the top of the screen that you wish to download Sales Items from.
2. Choose **Sales** **a** and select **Manage Sales Items**. **b**
3. Press the **Download Sales Items** button. **c**
4. Save the new spreadsheet to your computer or local file system.
5. If you need to make changes before the upload, open your spreadsheet. After you have made and saved your changes, you are ready to upload.
6. Change Venues at the top of the screen. **d**

The screenshot shows the BarkeepOnline Pro interface for the 'Market Street Bar' venue. The 'Sales' menu item is highlighted with a red circle 'a', and the 'Manage Sales Items' option is highlighted with a red circle 'b'. The 'Download Sales Items' button is highlighted with a red circle 'c'. The 'Venue' dropdown menu at the top right is highlighted with a red circle 'd'. The main content area displays a table of sales items with the following data:

Name	Sales Item Number	Modifier	Description	Average Sales Price
Domestic Bottled Beer	1			\$4.86
Domestic Draft	2			\$5.18
Imported Bottled Beer	3			\$8.00
Imported Draft	4			\$10.99
Premium Bottled	5			\$8.08
Premium Draft	6			\$8.86
Hard Cider	7			\$5.74
Well	8			\$4.44
Well Shot	9			\$4.71
Well Multi	10			\$5.56
Wine Sub Total	12			\$0.00

7. In the second Venue, begin by checking that your **Sales Upload Preference** are configured the same way in the new Venue.¹⁰
8. Select **Sales** and select **Manage Sales Items** from the dropdown menu.
9. Press the **Upload Sales Items** button. Press the **Choose File** button and choose the spreadsheet file from the first Venue.
10. The final step is to press the **Done** button on the top of the screen to save your changes.

See the **Managing Sales Items** section of the [BarkeepOnline User Guide](#) to review the detailed instructions for uploading and managing Sales Item spreadsheets.

continue to next page

¹⁰ After your Sales Items are set up, and if your other Venue has a different POS System, you might need to change your upload preferences.

Copying Sales Items (cont.)

Sales Items							
Add Sales Item +		Download Sales Items		Upload Sales Items		<input type="checkbox"/> Show Inactive Sales Items	
Show 25	Sales Items		Search: <input type="text"/>				
	Name	Sales Item Number	Modifier	Description	Average Sales Price	Cost	
  	Absolut Special	121			\$8.67	\$1.42	
  	Absolut Citron	123			\$8.08	\$1.52	
  	Absolut Mandarin	124			\$8.84	\$1.42	
  	Absolut Mandarin	124	double		\$13.55	\$2.13	
  	Absolut Peach	125			\$7.83	\$1.49	
    	Absolut Pear	126			\$7.73	\$0.00	
  	Absolut Vanilla	127			\$9.38	\$1.42	
  	Absolut Vanilla Special	128			\$7.04	\$1.42	

Review

After your Sales Items have been uploaded you will need to review them. There may be differences in Categories and Items between the two Venues. Here are some issues to watch for:

Categories

It is likely that you use the same Categories for all of your Venues.

But, if you used different Categories and your Items are the same, your Sales Items will still upload.

The Categories as logged in the second Venue will be the ones you assigned for Items in the second Venue.

For example:

- In the first Venue, all of the better brands of vodka were in a Category **Call Liquor**.
- In the Venue you uploaded the Sales Items to, there is a nested Category **Vodka** with a Parent Category **Call Liquor**.

Missing Items

Sometimes you might upload a Sales Item that has a Recipe that uses an Item that is not in your second Venue.

If an Item is missing, you will see the  warning icon.  You will need to add the Item to your Items List before fixing the Sales Item. Or, if the Sales Item is not one you serve in the second Venue, simply delete it.

Reminder: With BarkeepPro, changes you make to Sales Items and Recipes are only for the Venue you are logged in to.

Additional Information

Inventory Tips for BarkeepPro

BarkeepPro features the same Inventories as regular Barkeep. All the Inventory steps remain the same. Below are a few tips for BarkeepPro subscribers:

✓ **Transfer Inventories**

BarkeepPro subscribers can run Variance Reports where you upload Sales Data by Location.

To take advantage of this feature, you will need to do Transfer Inventories every time Items are moved from one Location to another within your Venue. Transfer Inventories are also necessary if you want accurate Reports where you select and sort by Location.

✓ **Price Changes in Receiving Inventories do not Sync to other Venues**

When you make a price change to an Item in a Receiving Inventory, even when you make the new price the Default Item Price , that change is only for the Venue you are doing a Receiving Inventory for.

If you need to change the Item Price in other Venues, you will have to switch to each Venue and change the Item Price. You have a choice to sign in to the other Venue(s) and immediately edit the Item, or, if you prefer you can wait until you add the Item in the next Receiving Inventory for the other Venue(s).

✓ **Suppliers are unique for each Venue.**

You can have the same Suppliers for different Venues, but you will need to set up your Suppliers for each Venue.¹¹

✓ **Moving Items between Venues with Receiving and Return Inventories**

The current version of BarkeepPro does not have a Transfer Inventory feature for transferring Items between Venues. If you have situations where you move Items (products) from one Venue to another, we recommend using Return and Receiving Inventories. See the Help Section at barkeepapp.com where there are instructions for **Multiple Venues**.

✓ **Lock your Inventories**

We recommend that Admins lock finished Inventories. This is especially important when you manage multiple Venues and need to prevent staff from inadvertently deleting or altering completed Inventories. Barkeep includes a feature where you can lock any Inventories by clicking on the lock icon next to the Inventory. The icon indicates whether the Inventory is locked  or unlocked. 

For complete Inventory instructions, see the **[BarkeepApp User Guide](#)**.

¹¹ **Note:** Suppliers can be copied over to another Venue when an account is first set up at the time Items and Categories are copied

BarkeepPro System Requirements

BarkeepPro requires BarkeepApp v6.0 or later. The current version of Barkeep is 7.0
BarkeepPro features are not available with older versions of BarkeepApp.□

Note: All the other System Requirements for using BarkeepPro with BarkeepApp v7.0 as well as using BarkeepPro online are the same.

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  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.

Optional Hardware

With BarkeepPro you can use the same optional scanners and **Escali SmartConnect Scale**. You can use the same equipment for any registered Venue. You can also use your iOS Device's built-in camera. The steps for scanning barcodes and weighing bottles are the same.

Is there a separate BarkeepPro app?

No. You use BarkeepApp. To access the BarkeepPro features you must have a BarkeepPro account instead of a regular BarkeepOnline account. When BarkeepApp syncs to a BarkeepPro account, the BarkeepPro features will be enabled on your iOS Device.

□ **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. Users can continue using BarkeepApp, but for maximum functionality and to take advantage of all BarkeepApp features, we recommend replacing your older iOS Device.

Barkeep Support

Need Additional Information?

Be sure to review the [BarkeepOnline User Guide](#) for detailed instructions as well as the Help page at barkeepapp.com which includes FAQ and Troubleshooting Tips.

We also can be reached at support@barkeepapp.com

Technical Questions

Any staff members who use Barkeep can access our user guides and troubleshooting documents on the Help Page at barkeepapp.com. Occasionally they may need to contact Barkeep support by email at support@barkeepapp.com or by phone. We are happy to assist with their technical questions.

Account Management/Billing

For account administration and billing questions, we can only respond to an Account Administrator **a** or a Venue user who has Admin Authorization. **b** Users with Inventory Only **c** access who inquire regarding account management and billing inquiries will be referred to their Account Administrator.

Username	Email Address	Permissions	Account Administrator	Lock Password
Noe Valley Mgr	noe@tofuburgersf.com	Noe Valley: Admin	<input type="checkbox"/>	<input type="checkbox"/>
Castro Mgr	castro@tofuburgersf.com	Default: Admin	<input type="checkbox"/>	<input type="checkbox"/>
Castro James	jtcastro@tofuburgersf.co	Castro Street: Inventory	<input type="checkbox"/>	<input type="checkbox"/>
Castro Street	mgr@tofuburgersf.com	Default: Admin; Flagshi...	<input checked="" type="checkbox"/>	<input type="checkbox"/>