Installation:

1. Install LATEST version
2. Enter the license, add the store and do an import
3. Set up the daily sales report (accept the defaults)
4. Set up automated import in task scheduler

Session 1: (Sales & Labor)

1. Daily sales (discuss any necessary changes but make them later - don't interrupt the flow)
2. Sales Summary Report (discuss Display Options, importing past sales)
3. Period-to-date sales report
4. Daily labor (how to edit and how to import past labor)
5. Labor Detail Report (how to edit and how to export to Adp, Paychex, etc.)

[The customer should now have a program that automatically imports sales and labor each day. They should know how to use the basic sales and labor reports. Leave them alone to get comfortable with this.]

Session 2: (Scheduling)

1. Set up schedule names
2. Set up schedule positions
3. Do a small schedule

[The customer should now know how to do an employee schedule. Exporting the schedule to the POS should also be covered if necessary]

Session 3: (Inventory setup)

1. Set up inventory groups
2. Set up vendors
3. Set up a few inventory items.
4. How to print an inventory worksheet and enter a count

[Leave the customer alone for a few days to enter the rest of their inventory items. They should enter the rest of their items, print a count worksheet and enter their first inventory count.]

Session 4: (Inventory Maintenance)

1. Check that beginning count was entered
2. Enter an invoice or two

[Leave the customer alone to enter invoices for the coming week or month. They should do another inventory count at the end of the week or month.]

Session 5: (First full inventory period)

1. Review cost of sales
2. Review inventory extensions

[The customer should have a beginning count, an ending count and all of the invoices in between. The cost of sales report and inventory extension reports should be reviewed to make sure they are reasonable. Help the customer fix any problems (i.e. missing or incorrect counts, incorrect invoice entries, etc.]

Session 6: (Menu costing)

1. Cost out a few recipes.
2. Discuss use of batch recipes

[This is absolutely the last thing that is done although it's the first thing everyone wants to do. The customer should have one or more decent cost of sales reports behind them before they start doing anything with recipes. After showing them how to enter a few recipes, leave them alone to do the rest.]