



*Aspect Software, Inc.*  
*Back-office software for restaurateurs*

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# CONVERTING POS SYSTEMS

## Support Guide for Customers Changing POS Systems

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If you ever are faced with switching or converting your Point-of-Sale (POS) System, you will have to follow these instructions in order to maintain data integrity within the Aspect Software program. Before you start, there are three (3) things to consider:

1. Do you have or need a cutoff date for the POS conversion?
2. Do you have or need a cutoff date for the Aspect conversion for Sales, Payroll, and Inventory?
3. Do you need to access the old Aspect POS data?

Once you have considered these three (3) things, you are now ready to Convert POS Systems.

## **\*\*System Preparation\*\***

Follow these steps BEFORE conversion or importing any data into the NEW store in Aspect.

Step 1 – Make a backup of your Aspect data, including your store directory.

To determine your store directory, go to Settings / Store Settings within Aspect and it will show you the store path, such as C:\Aspect\Store1. To make a backup, you may use programs such as WINZIP or PKZIP.

Step 2 – Delete Application(s) within Aspect.

To delete the Application(s) within Aspect, go to Settings / Applications. You will most likely see some applications here such as “Import POS Totals.” To delete the Application(s), simply highlight the Application itself and click on the Red Negative (-) in the top left corner. Additionally, you may right click on the Application itself and choose “Delete Record”

Step 3 – Rename the existing store.

To rename the existing store, go to Settings / Store Settings and double click on the store. Under the Store Name, add the word “OLD”, for instance “Aspect OLD”, and change the Code to “OLD.” When done, click OK.

**\*\*Note:** If you are polling to a home office, make a note of the Code prior to changing it.

Step 4 – Add a new store to Aspect.

To add a new store to Aspect, go to Settings / Store Settings and click on the Green Plus (+) in the top left corner.

Under the Store Name, add the name of the store followed by the word “NEW”, for instance “Aspect NEW,” and change the Code to “NEW” or use the original Code you noted as instructed above if you are polling to a Home Office.

Under the Store Directory, it should default to the next logical store directory.

Under the Point-of-Sale, choose the proper Point-of-Sale System.

Once done, hit OK. Some Point-of-Sale Systems have automatic import routines such as Aloha or Restaurant Manager. Other Point-of-Sale Systems don't have automatic import routines, such as Micros. Please consult with Aspect Software. If you are prompted to create an import routine, simply follow the on-screen instructions until finished.

As a result of creating a new store, you will have remade new import scripts as well as new import Applications.

Step 5 – Copy data from OLD store folder to NEW store folder.

In order to maintain consistency in your Sales, Payroll, and Inventory, you will need to copy over certain files to the NEW store folder. Copy all of the \*.dta files and \*.fmt files to the NEW store folder. To Copy you can use a DOS command or simply Edit / Copy and Edit / Paste the data from the OLD store folder to the New store folder.

Once you have copied the \*.dta and \*.fmt files to the NEW store folder, you will need to remove certain files. The files THAT NEED TO BE REMOVED are:

ACCTPYBL.dta  
CATEGORY.dta  
COMP.dta  
DEPTMNT.dta  
DISC.dta  
DLYLABOR.dta  
GIFTCERT.dta  
INVPOST.dta  
JOBDEF.dta  
NOIMPORT.dta  
PAIDIN.dta  
PAIDOUT.dta  
PRCHORDR.dta  
RACEDEF.dta  
REVCTR.dta  
SALE[YYYY].dta  
TAX.dta  
TENDER.dta  
UPDTPERP.dta  
VOID.dta

You are now ready to begin setting up the NEW store.

## **Inventory**

Follow these steps to maintain your Inventory Settings, Inventory Items, Inventory Groups, Vendors, and Recipes.

### **Step 1 – Maintain Recipes and Inventory Settings.**

Ensure you have these files in the NEW store. They are located in the store directory of the OLD store if you are missing any:

Ingr.dta - inventory items  
Ingrgrp.dta - inventory groups  
Nvsize.dta - size descriptions  
Recipe.dta - menu items  
Recpingr.dta - recipe ingredients  
Recpgrp.dta - recipe groups  
Vendors.dta - vendors

These files must always be copied as a group. Never try to copy any single file or a subset of this group.

### **Step 2 – Obtain a Menu Item List from the NEW POS.**

The first step is to print out a Menu Item list by Number or Name. It is important that the NEW POS Menu Item number be available for mapping. Please consult your NEW POS manual for instructions on how to obtain the report.

### **Step 3 – Setup Recipe and Inventory Mapping.**

To setup Recipe and Inventory Item mapping, go to Inventory / Edit Recipes. Once at the screen, right click and choose “Clear Menu Numbers”. The purpose of clearing the numbers is so you can enter in NEW menu numbers based on the NEW POS system.

### **Step 4 – Enter in NEW Menu Numbers**

Simply take your Menu Item List from the NEW POS system and begin entering in the menu item numbers into Aspect. To enter in the menu item numbers, go to Inventory / Edit Recipes and double click on each Recipe. An Edit Recipe box will appear and in the area called “Menu #”, enter in the corresponding number from the NEW POS Menu Item List. After each one, hit OK.

Inventory and Recipes are now mapped.

## Payroll

Follow these steps to maintain your Payroll Settings.

### Step 1 – Ensure Payroll Setup.

In order for Aspect to calculate overtime correctly, you will need to enter the frequency of your payroll and the overtime rules that should be used. Go to Settings / Payroll Setup / Payroll Settings.

Click the Overtime button at the bottom and enter the beginning day of your payroll week, the date of the first day of the current payroll period and your payroll frequency.

Next, turn on the checkboxes next to each overtime rule that should be applied.

The checkbox labeled 'Use average regular rate...' determines whether the overtime rate is 1-1/2 times the current job being worked or 1-1/2 times the employee's average rate. For example, if an employee works 20 hours as a hostess and 20 hours as a server, they will have 40 regular hours. If they then come into work the 41st hour as a server, this checkbox determines whether they are paid 1-1/2 times their server rate or 1-1/2 times their average hourly rate during the first forty hours.

The checkbox labeled 'Use tip credit...' is only used if you pay servers less than minimum wage. If you do not pay any employee less than minimum wage, leave it turned off. If you do, turn it on.

The checkbox labeled 'Overtime for hours over 40...' works as follows: Suppose an employee works several 10 hour shifts and you are paying them overtime for hours over eight in a single day. They will have some combination of regular and overtime hours even if they have not worked 40 hours yet. When the employee does reach 40 hours, they will be paid overtime for each additional hour. However, some states do not include the earlier overtime as part of the 40 hours.

## **Sales**

### Step 1 – Maintain Sales Reports.

To update the Daily Sales report and Sales Summary reports, copy the files below. They are located in the store directory.

Salesdef.dta - sales record setup

S1file.dta - sales record setup

Salefmt.dta - sales input setup

S1summ.fmt - sales summary reports

Slcusdef.dta - custom buttons on the right of the daily sales report

Slcustom.dta - custom buttons for the daily sales report

Incmdef2.dta - income and expense reports

As with the inventory files, these must always be copied as a group.

**\*\*Import Data into NEW Store\*\***

You are now ready to import data to the NEW Store. To do so, simply click on Action / Import POS Totals.



## **\*\*Post Configuration\*\***

Follow these steps AFTER importing any data into the NEW store in Aspect.

### **Sales**

#### **Step 1 – Setup Sales Defaults**

To setup the sales defaults, go to Sales / Edit Daily Sales. Once the wizard appears, simply follow the prompts. A default report is created the first time you use this feature based on the information available from your POS system. Generally, you will see sales, tax and gross sales on the left. On the right, discounts, charges and other adjustments are deducted from the gross sales to calculate a deposit due. You may key in your actual deposit to calculate your over/short.

There are buttons on the right of the report that bring up additional information. For example, click on the Discounts button to view a breakdown of each individual discount.

#### **Step 2 – Obtain the original Sales Record setup from OLD store..**

The first step is to print out a Sales Record for the OLD store. To print out a Sales Record, go to Settings / Sales Setup / Sales Record Setup and hit Print.

#### **Step 3 – Setup Sales Record**

To setup the Sales Record, go to Settings / Sales Setup / Sales Record Setup.

Using the OLD store sales record as a reference, you will have to recreate all of the custom calculations. To make changes to the Sales Record, first scroll down to the first available area. Then, simply double click on a blank line and add your calculations or custom input.

#### **Step 4 – Setup Sales Input Setup**

To setup the Sales Input Setup (Daily Sales Report), go to Settings / Sales Setup / Sales Input Setup. You will already have the default setup from the OLD store loaded. You will now have to remap the sales links in the Sales Input Setup. To do so, simply double click each line and choose the appropriate sales field. When done, close the screen, ensuring you SAVE your work.

## Step 5 – Setup Custom Input Setup.

To setup the Custom Input Setup (Buttons on right of Daily Sales Report), go to Settings / Sales Setup / Custom Input Setup. You will already have the default setup from the OLD store loaded. You will now have to remap the sales links in the Custom Input Setup. To do so, simply double click each line and choose the appropriate sales field. When done, close the screen, ensuring you SAVE your work.

## **Inventory**

### **Step 1 – Verify Recipe Integrity.**

Go to Inventory / Edit Recipes and double check the price, menu number, and category assignment of all items.

If you come across items that are mapped incorrectly, you may manually modify them. To modify them, simply double click each incorrect item and make the appropriate changes.

If you come across items you are unsure about, you may want to create an “OLD” Inventory Group and reassign items to this group or simply delete the items. First, close all Aspect windows you may have open. Then, to create a new Inventory Group, go to Settings / Inventory Setup / Inventory Groups and hit the Green plus (+) to add a group, name the group, assign a sales link, and hit OK.

### **Step 2 – Change Inventory Group Links.**

Since the sales record has been modified due to a NEW POS system, the sales links in the Inventory Groups will have to be repaired. To repair these links, go to Settings / Inventory Setup / Inventory Groups and double click on each line. Each line will have the potential for six (6) links. To change the link, simply hit the drop down menu. When done, hit OK.

## **Payroll**

### **Step1 – Load Payroll into Sales Record**

To load payroll into the sales record for use on Sales Reports, simply go to Settings / Sales Setup / Sales Record Setup and scroll down to the last entry. Once you have found the last entry, simply go a few more lines then right click and choose “Load Job Hours” and then right click again and choose “Load Job Pay”.

### **Step 2 – Setup Payroll Reports**

If you have created or used customized reports for payroll in the past, you will have to reset up these reports.

Every report in Aspect can be customized by clicking on the binoculars and then Custom after opening the report.

The custom window is divided into three parts. The top part is where you specify how the report will be sorted. The bottom part is where you select the columns to be displayed. The middle section will vary depending on the report.

When you add a column to the report, make sure to highlight the position you want it to occupy in the list of 'fields selected'. Otherwise, new columns will be added to the left side of the report.

Experiment with the display options in each window and learn how to use them. You can always restore a report to its default settings by clicking the Default button at the bottom of the Custom window.

## **\*\*Review\*\***

Once you have done these steps as listed above, you will be able to do the following:

1. Setup a NEW Store for the NEW POS
  - a. Inventory
  - b. Sales
  - c. Payroll
2. Reporting for Historical purposes based on the OLD POS
  - a. Inventory
  - b. Sales
  - c. Payroll
3. Reporting for Historical purposes based on the NEW POS
  - a. Inventory
  - b. Sales
  - c. Payroll

If you have any questions, please feel free to call us at 405.721.4420 or 800.454.3280 Monday through Friday 9am – 5pm CST or visit our website at [www.aspect-software.net](http://www.aspect-software.net) for a list of FAQs.