BarkeepApp User Guide for iPhone

Version 7.0
September 2024

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

Table of Contents

About Barkeep v7.0

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

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

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

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

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

System Requirements

BarkeepApp

BarkeepApp v7.0 requires **iOS** version 12.0 or later.

Hardware Required

BarkeepApp v7.0 is compatible with the following:

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

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

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

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

Infinea Tab and **Infinea Tab M** laser scanners for **iPad** users.
      (available by special order from barkeepapp.com)
      Note:
- The **Infinea Tab** only works with the **iPad 7** or later models.
- The **Infinea Tab M** only works with the **iPad Air 4** and **5**, and **iPad Mini 2** or later models.

      See the **Help Section** at barkeepapp.com for details.

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

System Requirements (cont.)

Etekcity Luminary Nutrition Scale

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

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

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

BarkeepOnline

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

- **Chrome 120** or later
- **Firefox 123** or later
- **Edge 120** or later
- **Opera 105** or later
- **Safari** (desktop) **v17.0** or later
- **Safari (iOS) v17.0** or later

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

> *Tip:* **Make sure your iOS Software and version of BarkeepApp are up-to-date.**
> We recommend keeping your **iOS** Device up-to-date with the latest version of Apple's **iOS** software.
> Check your settings ⚙ to make sure you are running the latest version available. You may need to update Apple's **iOS** software in order to update to the latest version of BarkeepApp.
> Check the App Store 🅰 on your **iOS** Device for the latest BarkeepApp update. There is no additional cost to update BarkeepApp.

Getting Started

Checklist – *Before you take your first Inventory…*
Please review this list and to make sure your version of Barkeep is ready and set-up correctly:

✓ **Install BarkeepApp**

BarkeepApp is available from the App Store 🅰 for $40.

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

✓ **BarkeepApp Settings**

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

✓ **Setting up Email**

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

✓ **Customizing your Barkeep**

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

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

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

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

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

Settings

General Settings

We recommend configuring your basic settings before you begin using Barkeep. It is easy to reconfigure your settings later. After you are more familiar with Barkeep, you may want to adjust your settings to suit your specific needs.

To configure BarkeepApp:
1. Select "Settings" **a** from the Main Screen.
2. Next select **General**. **b**
3. Below and on the following pages you'll find descriptions of the different General Settings.
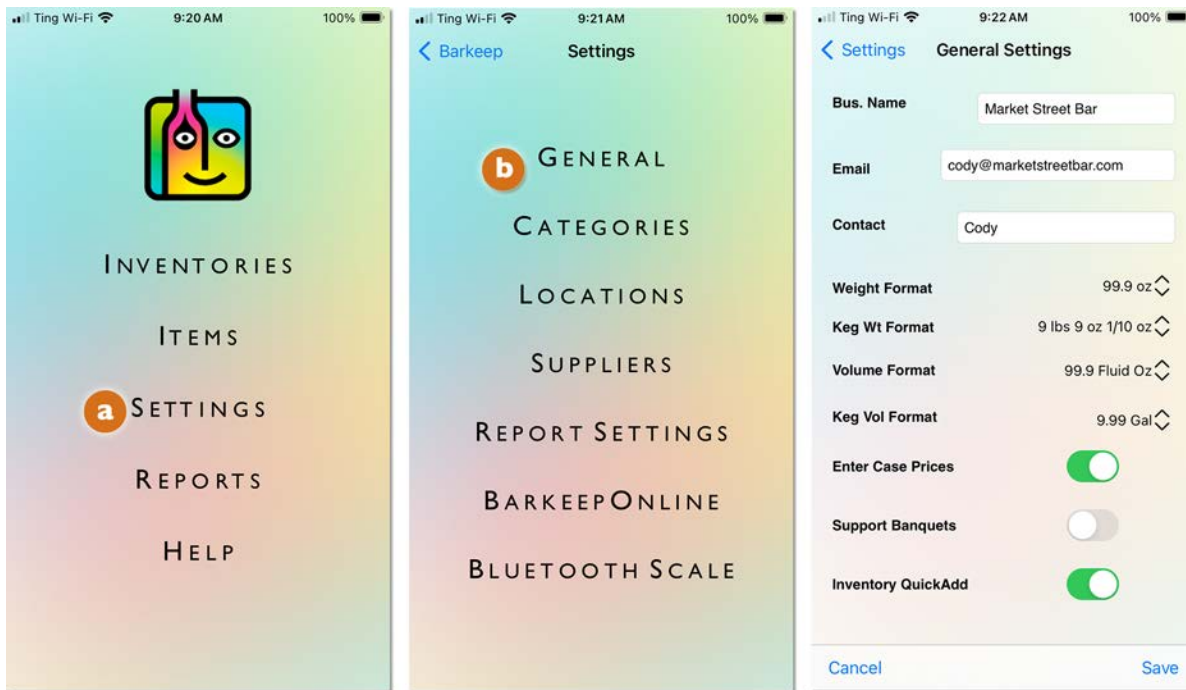
Name, Email and Contact

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

You need an Email address for your account

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

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

General Settings (cont.)

Weight Format and Measurement Settings

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

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

Keg Weight Format

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

Volume Format

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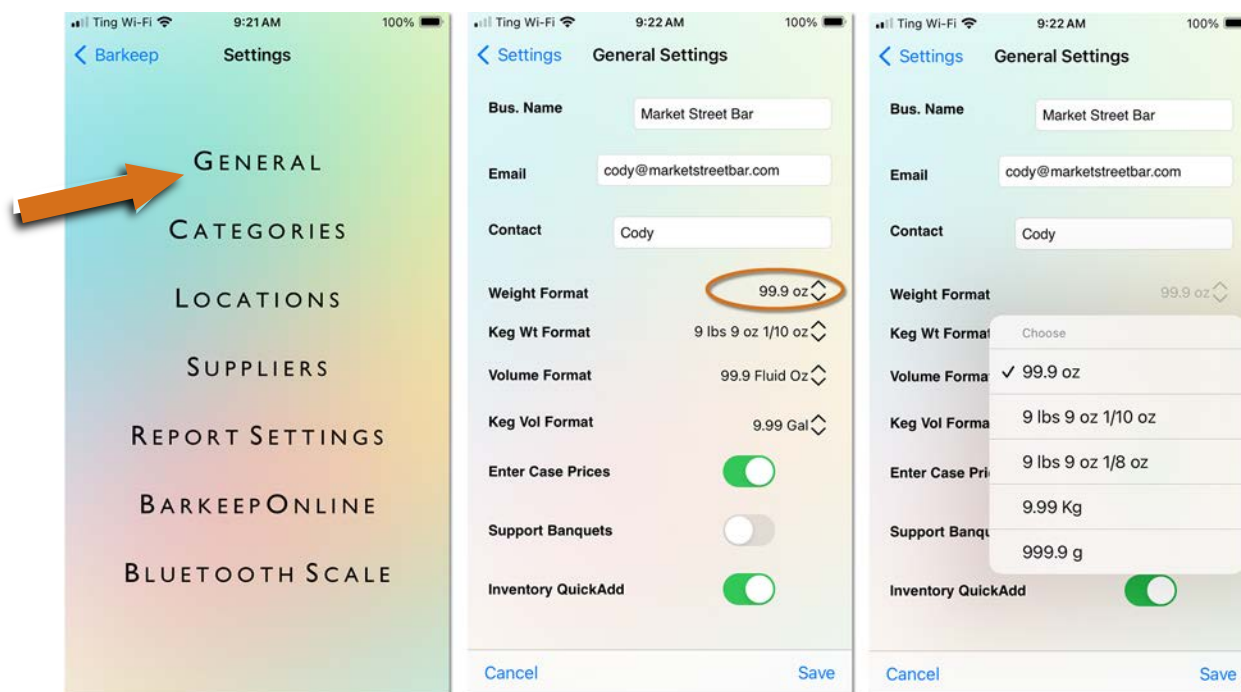
Digital Scale Settings

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

See the **Using a Bluetooth Scale Section** for specific system requirements for digital scale use.

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

👆 **click here** — To purchase an **Etekcity Luminary** scale via barkeepapp.com.

General Settings (cont.)

Metric Users

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

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

Additional General Settings

- **Case Price Setting**
  BarkeepApp is set to allow Case Prices by default.   You may turn off this setting if you prefer.
  Adding Cases for more about using Case Prices vs. Prices per Bottle.
- **Support Banquets**
  Use to activate Barkeep's Banquet feature. See the **next page** for details.

Other Settings

- This User Guide has detailed sections about:
  - **Categories**
  - **Locations**
  - **Suppliers**
    The **Receiving Inventories Section** has details about managing Suppliers in Barkeep.
  - **Report Settings**
  - **BarkeepOnline**
  - **Bluetooth Scale**
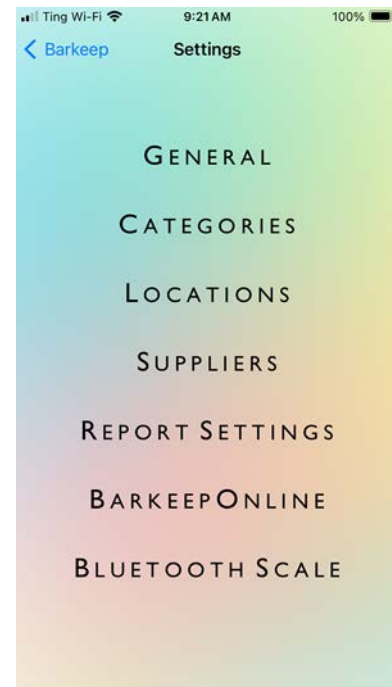
Banquet Settings

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

1. Select "Settings" **a** from the Main Screen. Next select **General Settings**. **b**
2. On the General Settings screen switch "Support Banquets" **c** to the on setting.
3. Press **Save** on the bottom toolbar **d** to save your changes or select to **Cancel** discard them.
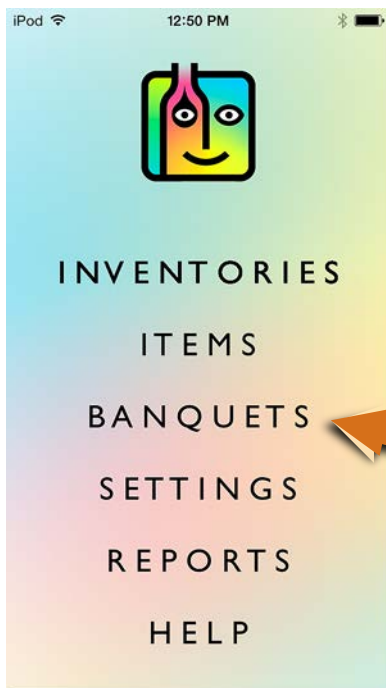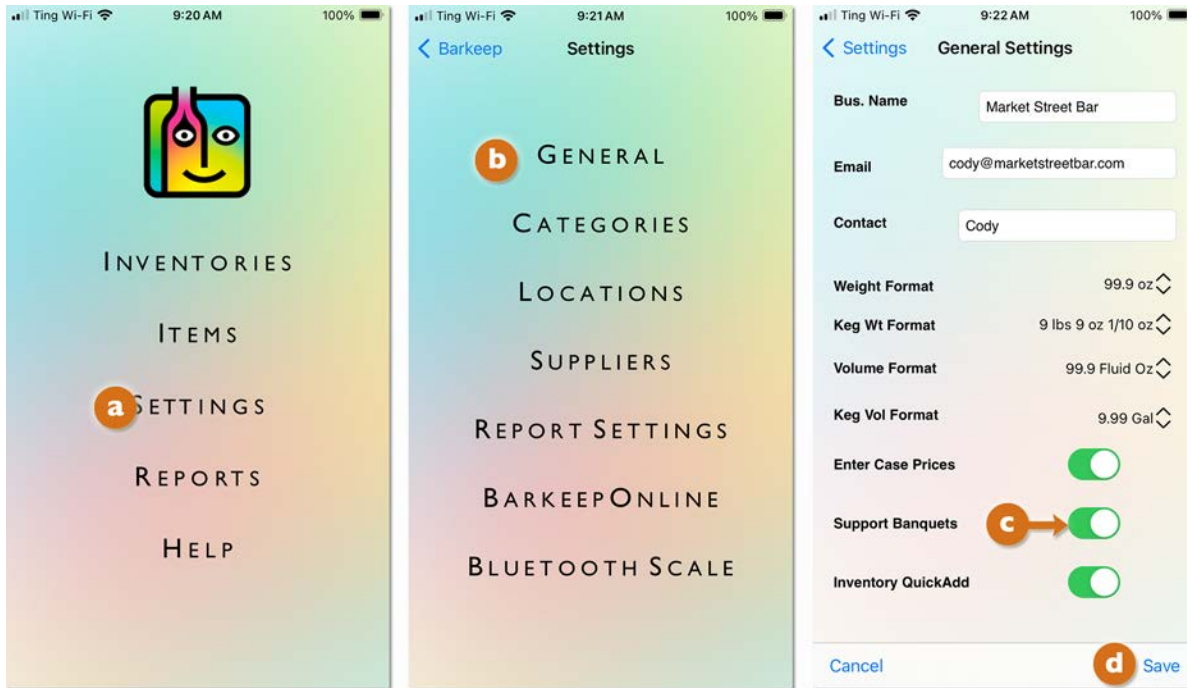
Note: If you want to stop using the Banquet features you can return to General Settings and turn Support Banquets off.

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

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

Data Storage

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

To turn on the Auto Delete feature:
1. Select "Settings" **a** from the Main Screen. Next select **BarkeepOnline**. **b**
2. On the BarkeepOnline Settings screen, switch "Auto Delete Inventories" **c** to the on setting.
3. Press **Save** on the bottom toolbar **d** to save your changes or select to **Cancel** discard them.
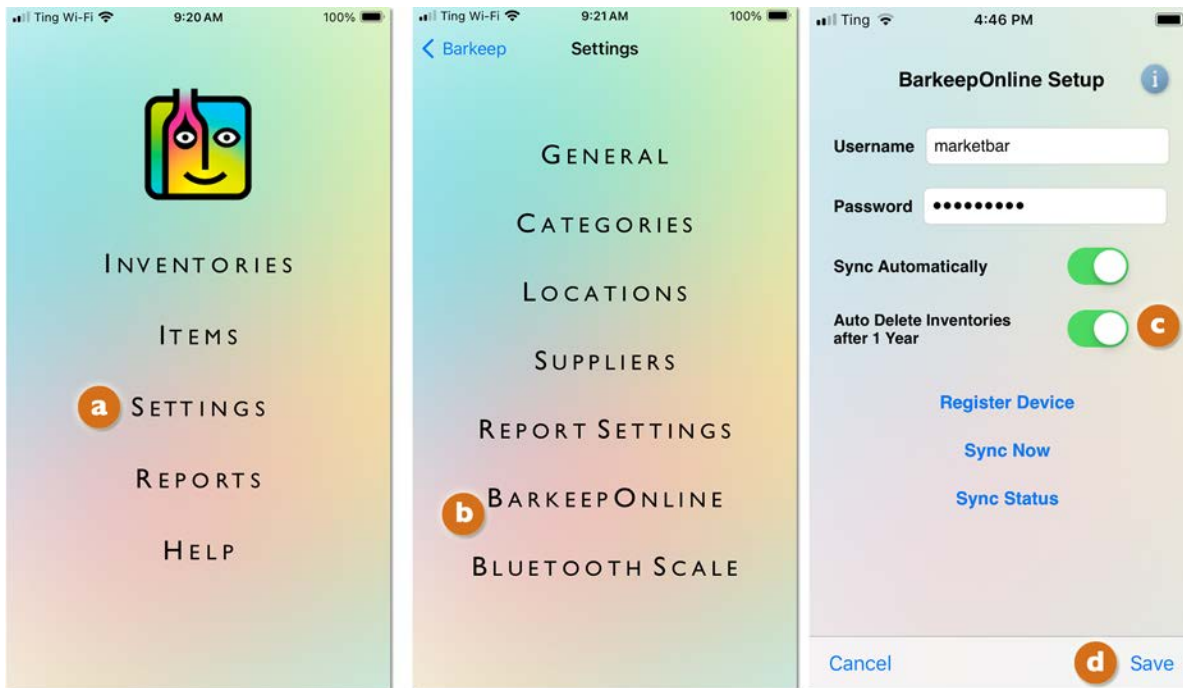
Note: When you review your Inventories list on your **iOS** Device, Barkeep will display Inventories from the last 30 days by default. You may see your older Inventories by using the "Show Old Inventories" filter.
See **Filtering Inventories** for details on filtering your Inventories List.

With BarkeepOnline
With a BarkeepOnline account, your older Inventories remain available on our secure server[1], so there is no reason to keep the older Inventories on your Device.
BarkeepOnline is an add-on, hosted service, see barkeepapp.com for more information.

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

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

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[1] **Note:** The data in your BarkeepOnline account is stored on Barkeep's secure servers and is never shared with or sold to a third party.

Locations

Barkeep is able to track Inventory and usage by multiple Locations.

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

For example, you can have a single Location named "My Bar," or you can have many Locations like "Storage," "Walk-In Cooler," "Well 1," "Well 2," "Well 3," "Patio Bar," etc.

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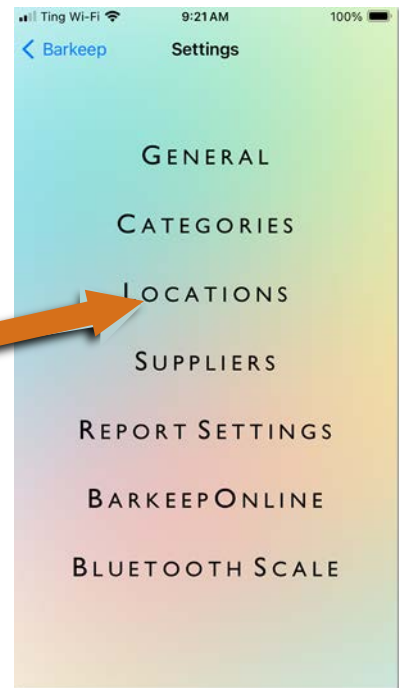
Adding a new Location

To add a new Location:

1. Go to Settings and select **Locations**.
2. Select the ➕ icon on the bottom toolbar **a** of the Locations screen.
3. Enter a unique name **b** for your Location and press ⟨Done⟩. **c**
4. Press **Save** on the bottom toolbar **d** to save your new Location or select **Cancel** to discard it.
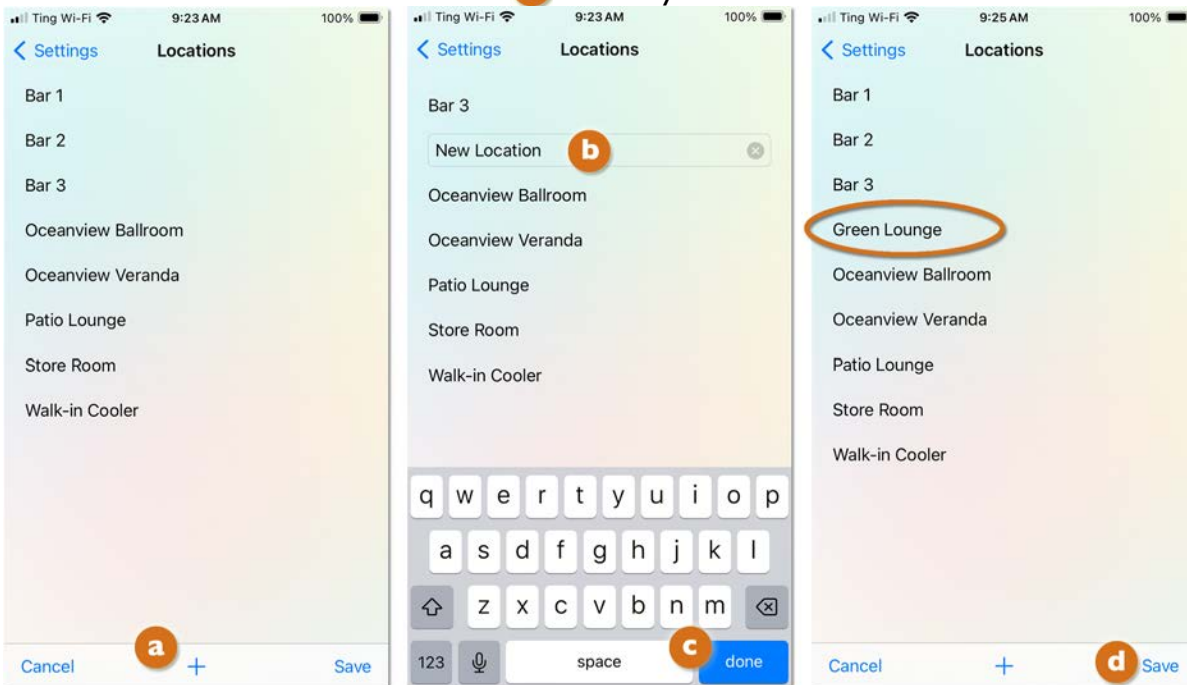
Modifying an Existing Location

To rename or modify an existing Location:

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

The example below shows renaming the Location **Green Lounge** to **Mezzanine**.
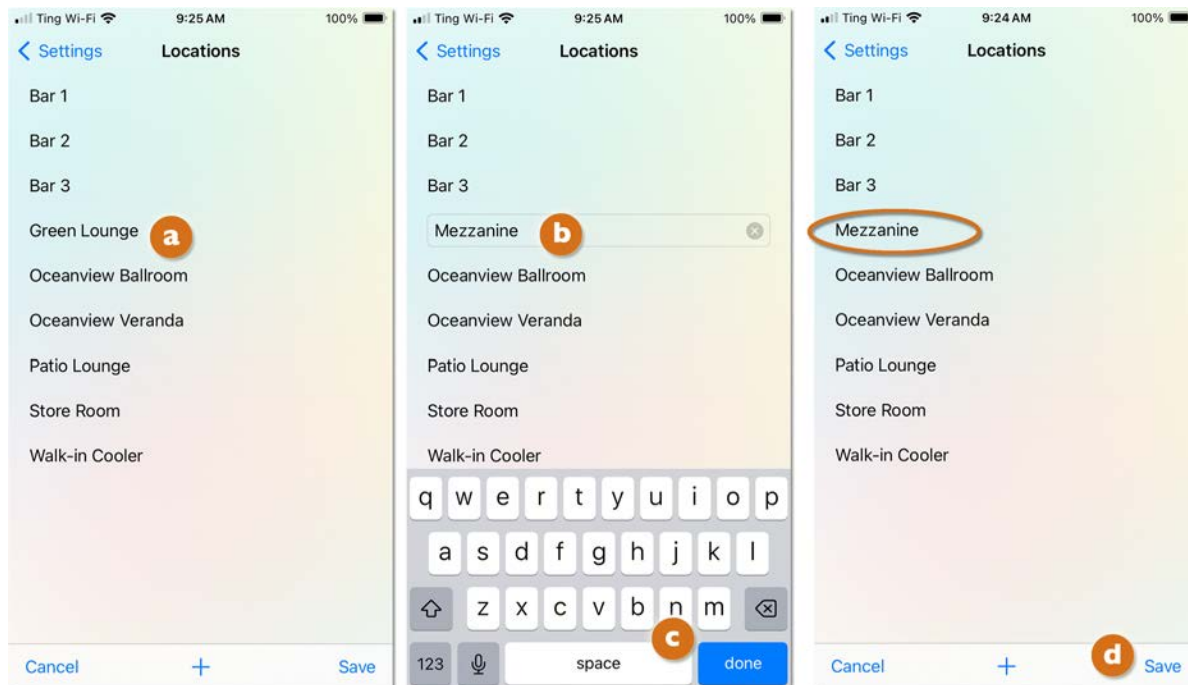
Deleting a Location

To delete a Location:
1. Go to Settings and select **Locations**.
2. Slide your finger along the Location name and a red `Delete` button will appear.
3. Press the `Delete` button.
4. Confirm your choice **(a)** by choosing **Delete** or select **Cancel**.
5. Press **Save** on the bottom toolbar **(b)** to save your changes.
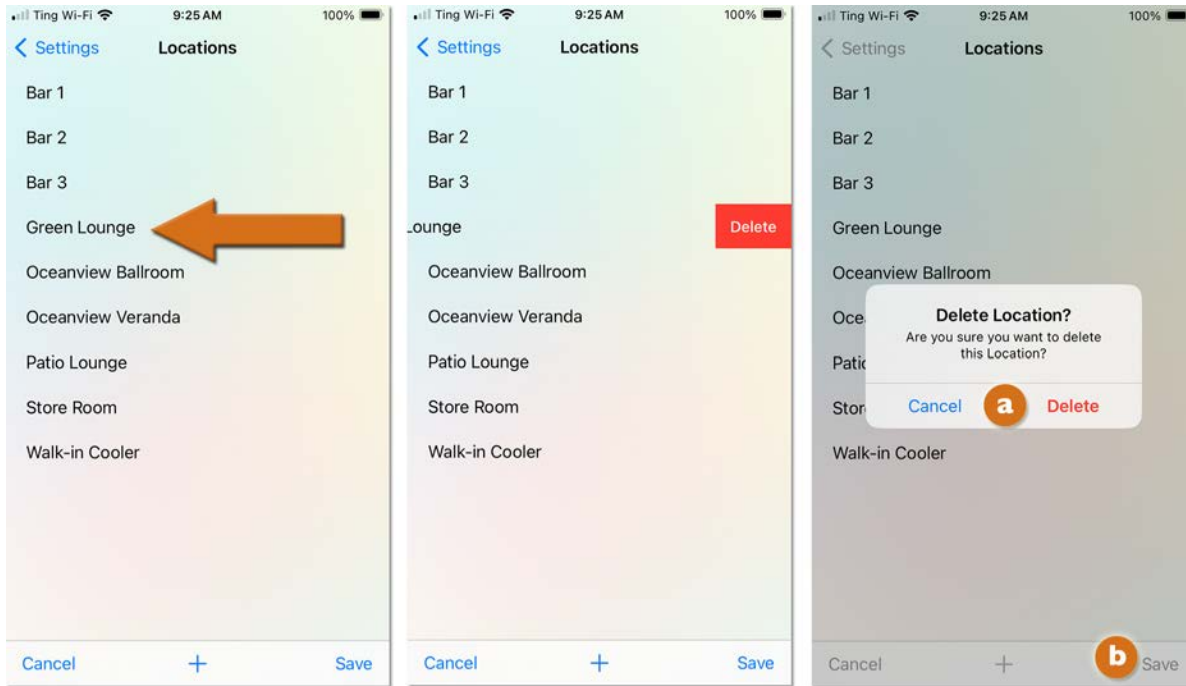
Note: If you delete a Location that is used in an existing Inventory, the Items that have been added to the deleted Location will show up with a blank Location name. You can move those Items to a different Location or leave them with a blank Location name.

Categories

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

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

How do I choose and assign Categories?

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

Getting Started with Categories

To manage your Categories:
1. Select the Categories button on the Settings screen.
2. This will take you to the Categories screen, which shows you a list of all your existing Categories. The example below shows Barkeep's default Categories which are explained on the **next page**.
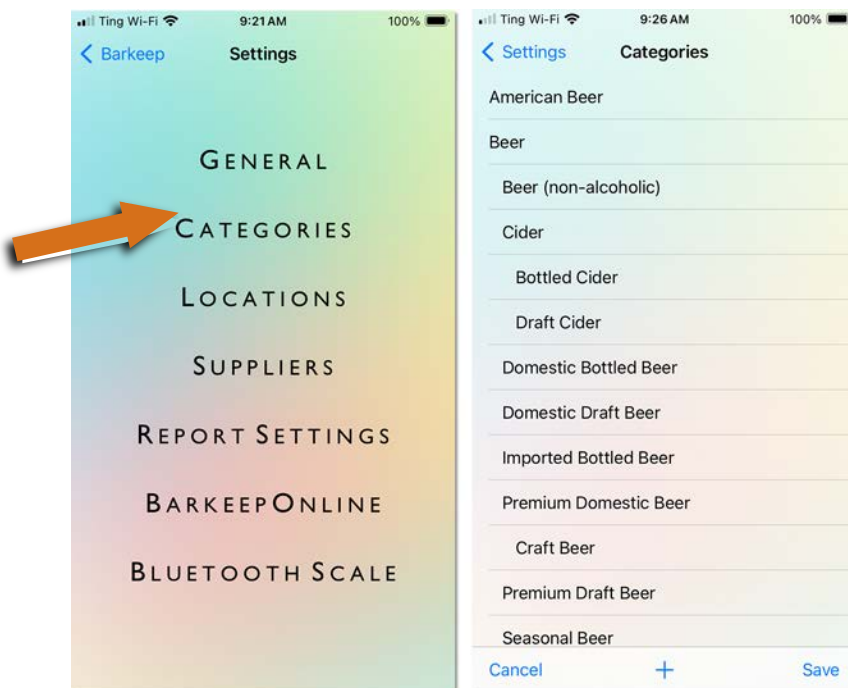
Default Categories

Barkeep has been set up with the following default Categories.

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

Starting with Barkeep Defaults

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

Why Categories Matter

When you use BarkeepOnline[2] to upload Sales Data from your POS System, you will need to set up Barkeep Sales Items that correspond to each Sales Items in your POS System.

When your POS System uses Sales Items that specify certain Items (products) you would match them to Sales Items in BarkeepOnline. A POS System with a Sales Item like **Tanqueray G&T** would have a corresponding Barkeep Sales Item **Tanqueray G&T**. In Barkeep, you will need to add a Recipe for the amount of **Tanqueray** you use for that cocktail (e.g., 2 oz.). In BarkeepOnline, when you run a Variance Report, you would be able to compare your Sales Data for **Tanqueray** to your actual usage based on Inventories.
With a more generalized POS System, say with a Sales Item like **Call G&T** where the gin used could be **Tanqueray**, **Grey Goose** or **Beefeater** you will only be able to compare Sales Data and Actual Usage at a Category level and not the Item Level. For example, a Category like **Call Liquor** or **Call Gin**.

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[2] Uploading Sales Data Requires a BarkeepOnline account and subscription.

A Nested Categories Example

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

- Beer
  - Beer
    - Domestic Bottled Beer
    - Domestic Draft Beer
    - Imported Bottled Beer
      - Canadian Beer
      - German Beer
    - Premium Draft Beer
      - Craft Beer
    - Bottled Cider
    - Draft Cider
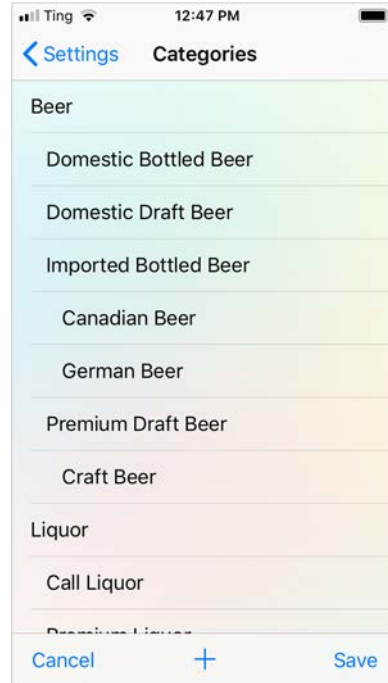
You can assign an Item to any <u>one</u> Category, and when you run your Reports, you will see your Categories and subtotals organized in a way that reflects how you organize the products you serve.

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

POS Systems with single keys for a Brand Family

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

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

An Absolut Example

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

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

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

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

Adding Categories

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

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

To add a new Category:

1. Select the ➕ icon ⓐ on the bottom toolbar of the Categories screen.
2. A new Category details screen will appear. ⓑ
3. Press the name field ⓒ to activate the keyboard and enter a name for the new Category in the name field and then press Done.
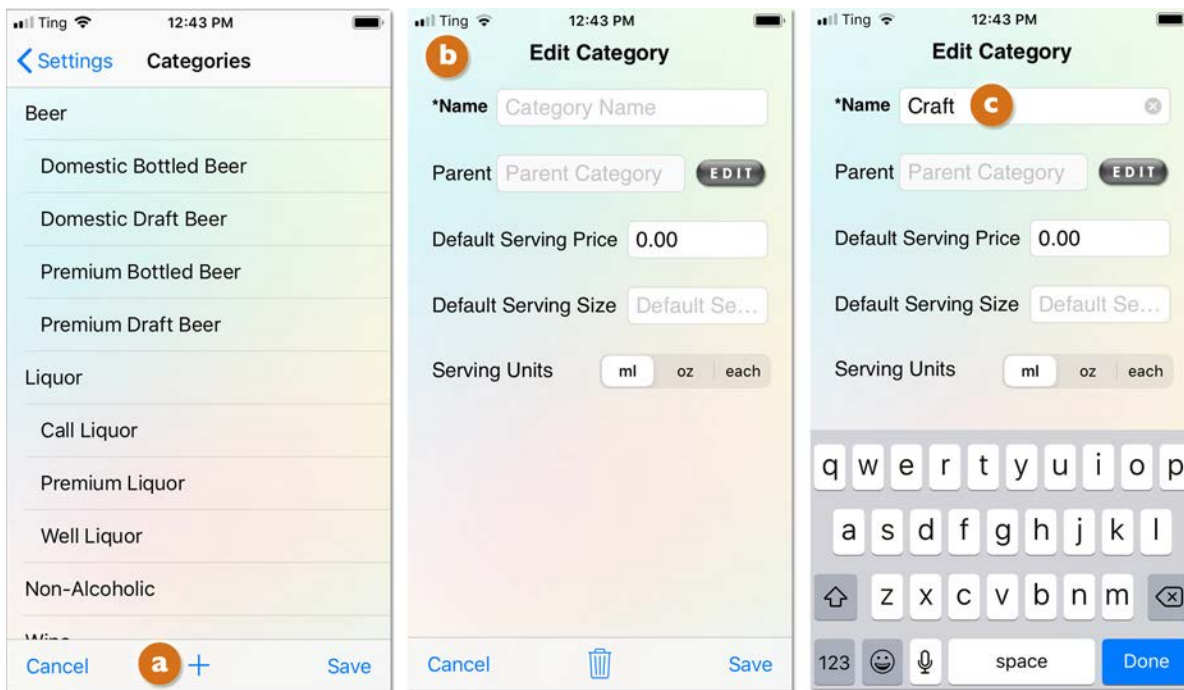
Adding Categories (cont.)

4. You can choose a Parent Category (this is optional). Press the **EDIT** button. **d**
5. Select a Parent Category **e** and press **Save** on the bottom toolbar **f** to save your choice or select **Cancel** to discard it.
6. There is additional information you can add to your Category **g** if needed.
7. In this example, as you always sell the beer in this Category by the pint, you have entered 16 ounces for the default serving size. Select ounces **h** for the Serving Units.
8. The final step is to press **Save** on the bottom toolbar **i** to save your Category or select **Cancel** to discard your changes.
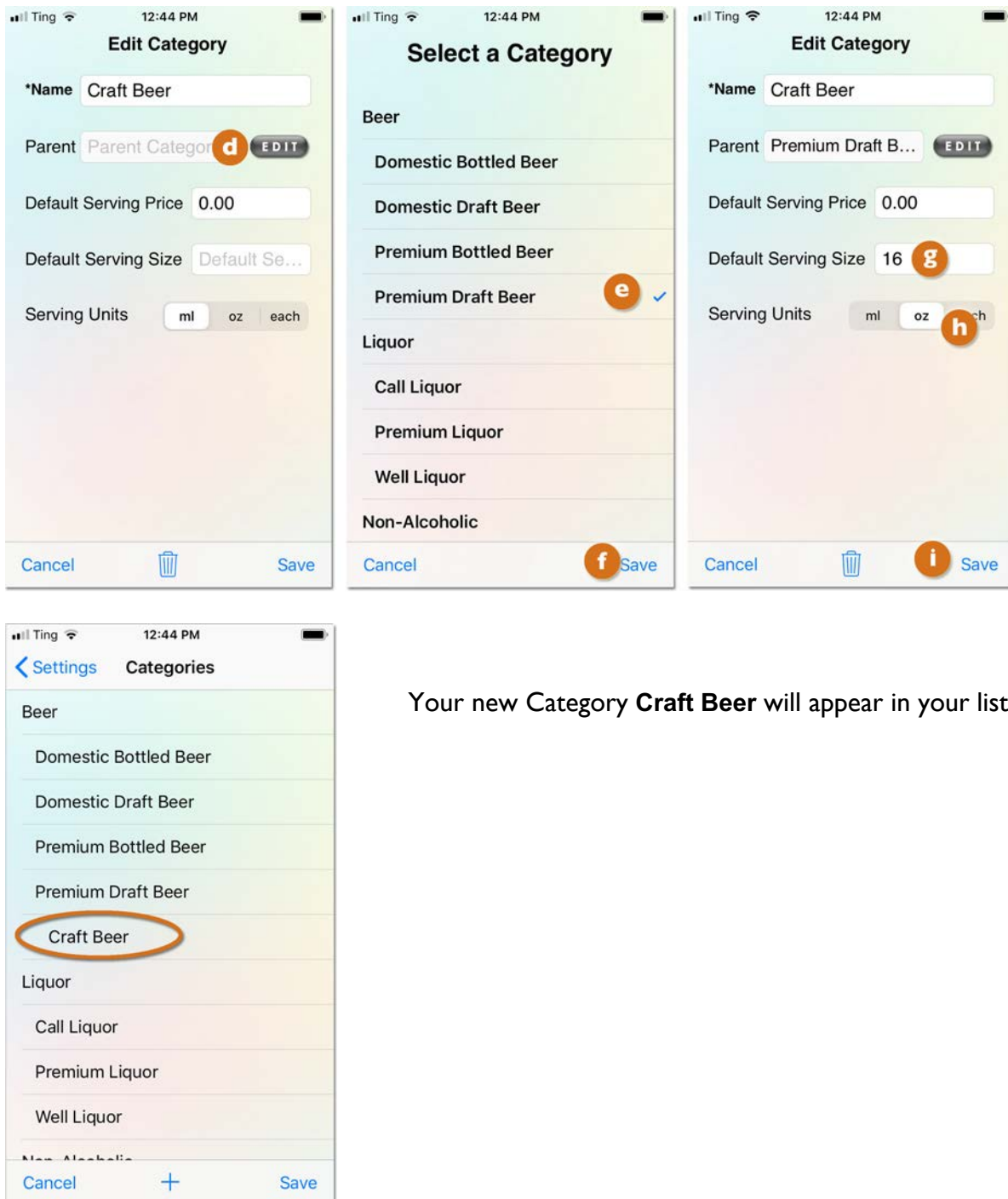
Your new Category **Craft Beer** will appear in your list.

Editing Categories

To edit and add information to a Category:

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

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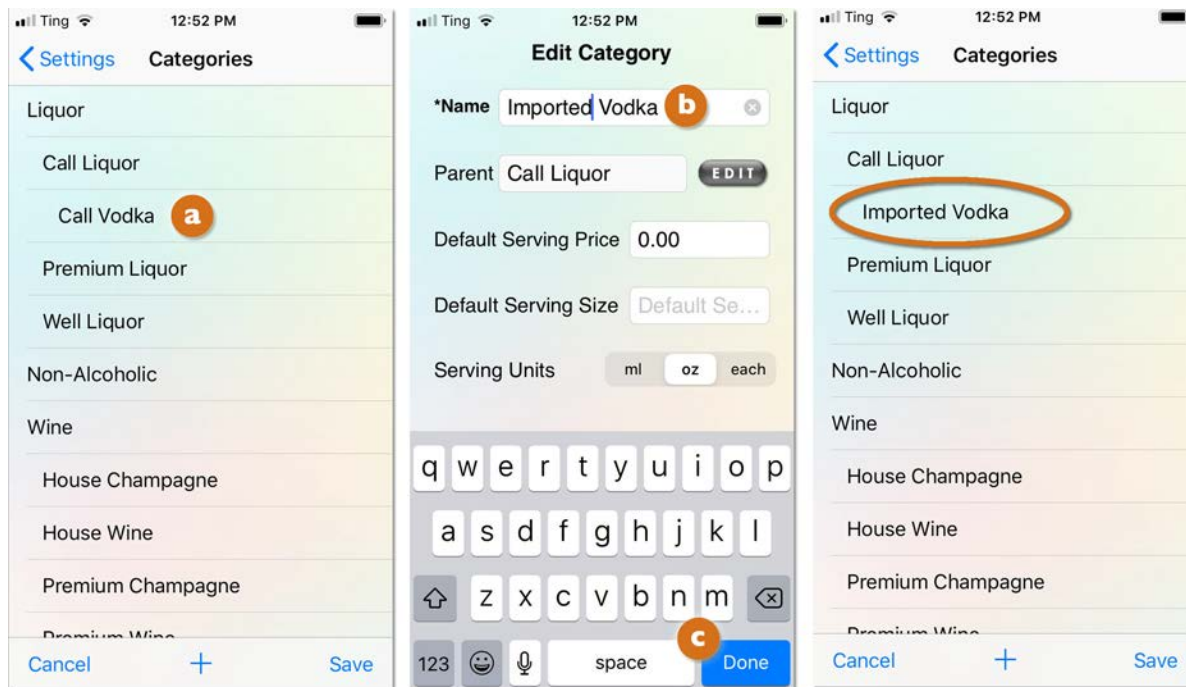
Deleting Categories

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

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

How to Delete a Category
There are two methods for deleting a Category:

1. With the first option, go to the Categories screen.
2. Slide your finger along the Category name you would like to delete.
3. A red Delete button will appear. After you press Delete an action menu will appear.
4. Press **Delete** to confirm you would like to delete the Category (a) or press **Cancel** to keep it.
3. The final step is to press **Save** on the bottom toolbar (b) to confirm your deletion or select **Cancel** to undo the change.

22
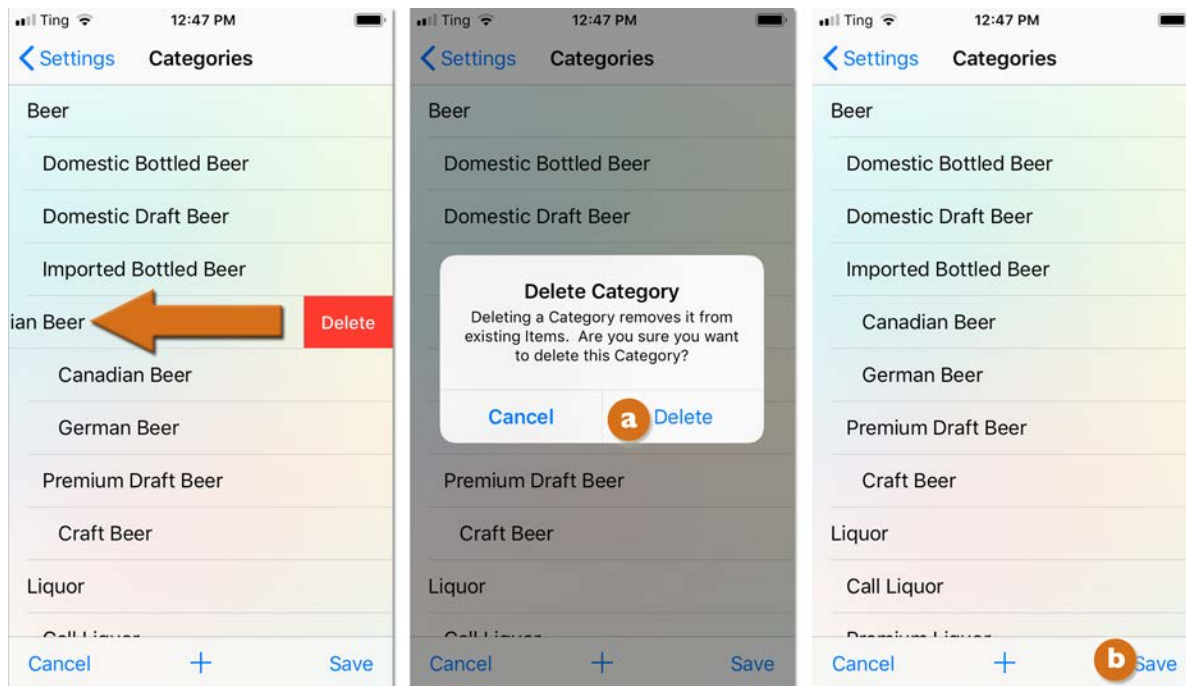
Deleting Categories (cont.)

5. The second option is to press the 🗑 icon **c** on the bottom toolbar in the Edit Category screen.
6. An action menu will appear. Press **Delete** to confirm you would like to delete the Category **d** or press **Cancel** to keep it.
4. With this option, when you select **Delete** the Category is immediately deleted.
5. In this example, note the Item **Stella Artois** no longer has a Category. **e** It had been in the Category **Belgian Beer**.

Note: We recommend assigning all your Items to a Category
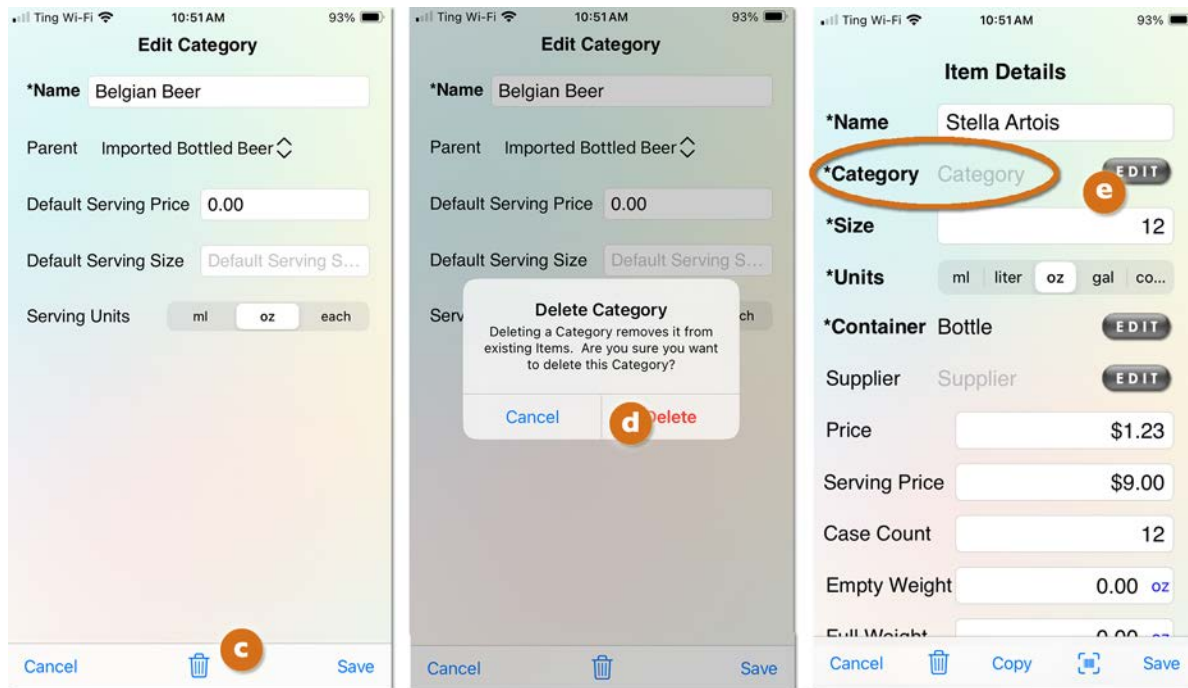
Tip: When you review your Items List and select **By Category**, **f** Barkeep will display your Items without Categories at the top of the list. You can select each Item and add a Category.
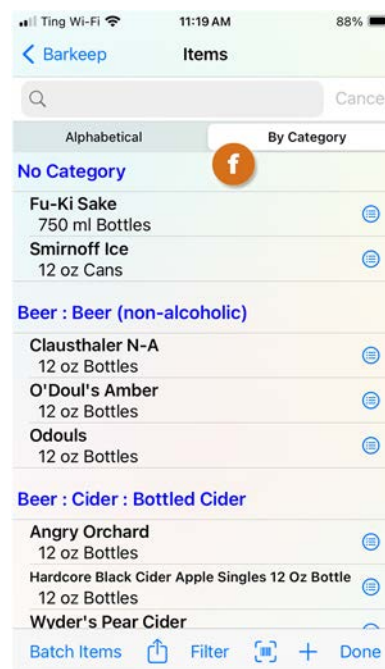
Deleting Categories (cont.)

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

This example below illustrates how Barkeep manages Categories when you delete a parent Category:
- In this example, a **Call Liquor** Category is nested in the Category **Liquor**.
- A **Vodka** Category is nested in **Call Liquor** (a) and because the bar offers a large selection of vodka separate Categories of **Polish Vodka**, **Russian Vodka** and **Swedish Vodka** have been added to manage those Items of imported vodka.
- Because a wide variety of **Absolut** products are offered, there is even an **Absolut Vodka** Category (b) in the **Swedish Vodka** Category.

- When the Category **Vodka** is deleted (c) the Categories **Polish Vodka**, **Russian Vodka** and **Swedish Vodka** are all moved (d) to the top level in the Categories List.
- But notice that the Category **Absolut Vodka** (e) remains nested in **Swedish Vodka**.
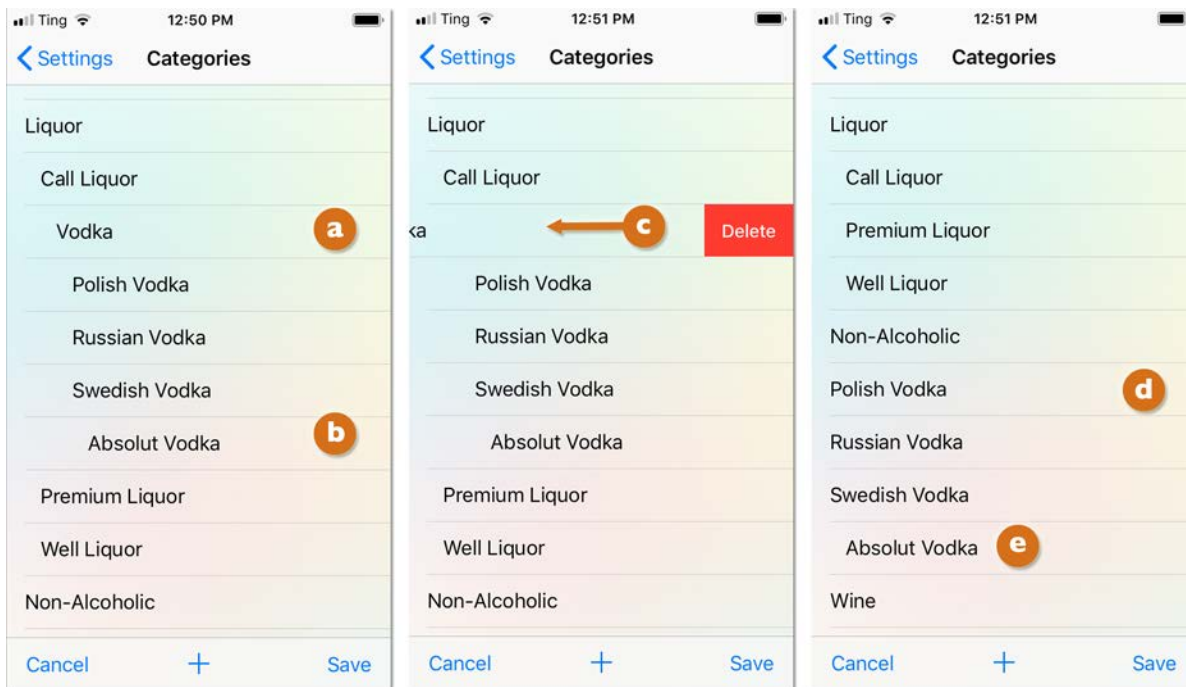
Changing and Reassigning Parent Categories
After you have deleted a Parent Category you can edit any of the Categories that were moved to the top level and reassign them to a new Parent Category. For example, if you wanted to nest **Russian Vodka** under the Category **Call Liquor**. When you add a Parent Category to Category, any Categories nested in that Category move with it. For example, if you were to reassign **Swedish Vodka** to **Call Liquor**, then the **Absolut Vodka** Category would remain under **Swedish Vodka**.

Items

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

Pre-Installed/Default Items

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

However, you are not limited to the set of default Items (see below). Barkeep has a database of over 75,000 wine, beer and liquor products that are maintained on the Barkeep Server. They can be added to your Items List. You can add as many Items as you'd like.
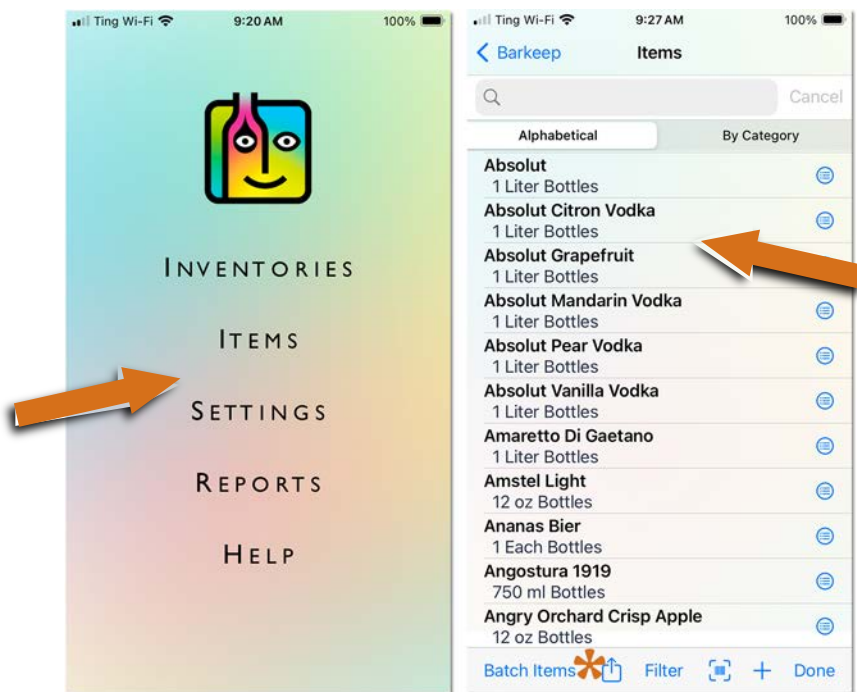
Note: If you do not carry the product, you can delete any default Items from Items List. You can re-add the Items, if needed, by following the steps on the following pages.

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

Adding New Items

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

- **Scanning** – Scan Barcodes and search the Barkeep Server's database to find the Item add to your List.

- **Searching** – Search the Barkeep Server's database by name and find over 75,000 products you can add to your Items List.

- **Copying** – Make a copy of an existing Item and then modify it.

- **Manually** – If you cannot find the Item(s) in our database, you can manually create a new Item.

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

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

Is it possible to import Items from a Spreadsheet?

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

How does it work?

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

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

Adding New Items by Scanning

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

To begin adding Items by scanning, select "Items" to go to the Items screen:
1. On the bottom toolbar **a** of the Item screen, press the scan icon to activate your Device's camera or **Linea Pro** scanner and scan the barcode. **b**
2. After the barcode is scanned a pop-up menu will give you three choices. Select **Search Barkeep**. **c**
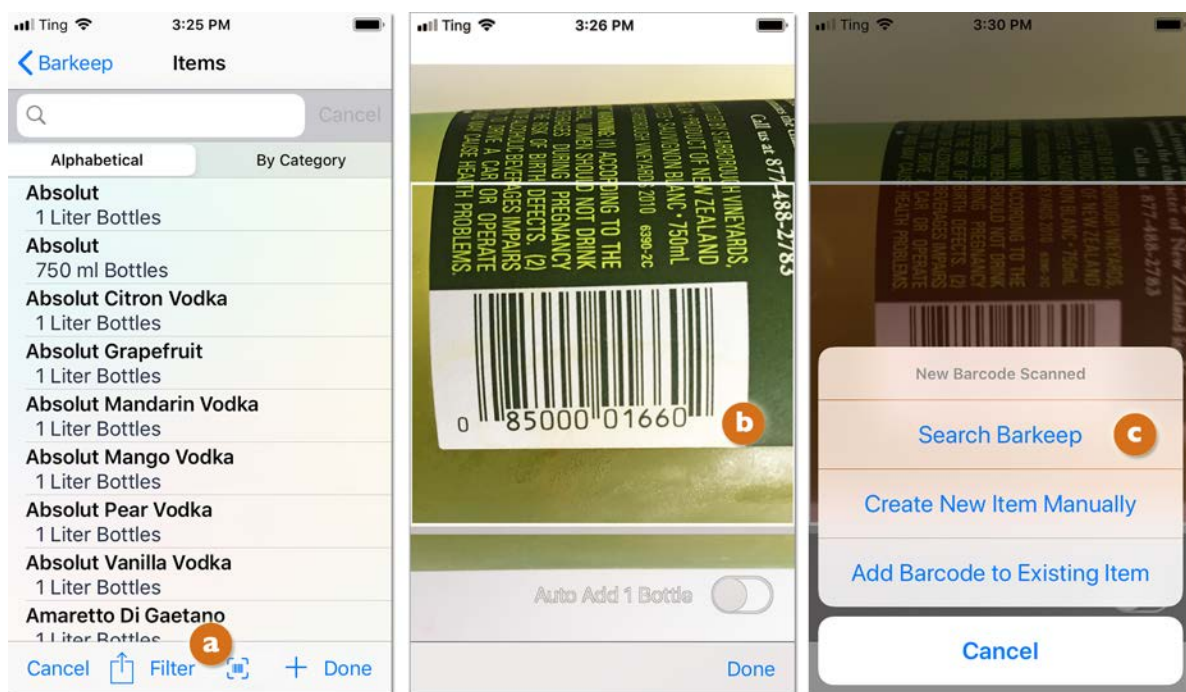
3. If the Item's barcode is in the Barkeep Database, an alert will indicate it has been added to your Items List. **d**
4. You can now add additional information to your Item, for example a Category, Supplier, etc. **e**
5. When you are finished, press **Save** on the bottom toolbar. **f**
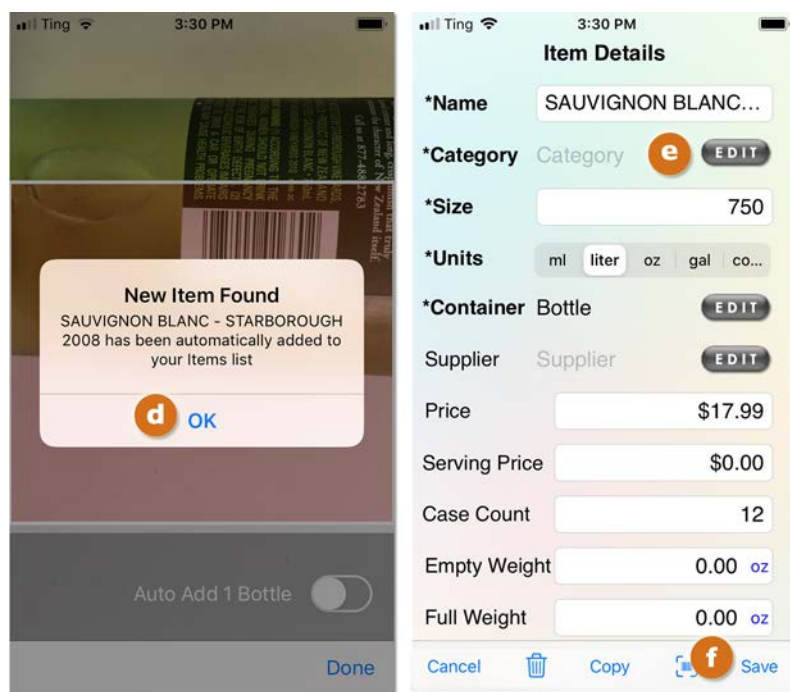
continue to next page

Adding New Items by Scanning (cont.)

What happens if you scan a barcode that is <u>not</u> in the Barkeep Database?

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

8. If you select **No**, **g** and do not have Barkeep create a new Item, you will return to the scanning screen.
9. If you do want to create a new Item and select **Yes**, **h** you will see a new Item Details screen.
10. When you scroll down, **i** you will see that the <u>only</u> detail for the new Item will be the barcode.
11. You will need to add an Item Name, Category, etc. to your Item Details before pressing **Save**.

Note: Not every Item in the Barkeep Database has a barcode. You may also choose to select **No**, **g** and then search the Barkeep Database before entering all the Item Details.

Why are there some Items in the Barkeep Database without UPC Barcodes?
The product information in the Barkeep Database is supplied to us by manufacturers and distributors. The current database has over 75,000 Items that include different products, bottle sizes and varieties. We continually are updating and expanding the database when we receive additional information and new products. Some Items even have more than one barcode, and this can be determined by region or country. There can also be separate barcodes for specific varieties, limited editions and different vintages of wine.

If there is more than one barcode, which one should I use?
If you are going to scan barcodes to add Items to Barkeep inventories, be sure to add the barcode to the Item Details that appears on the bottles you receive from your Supplier.
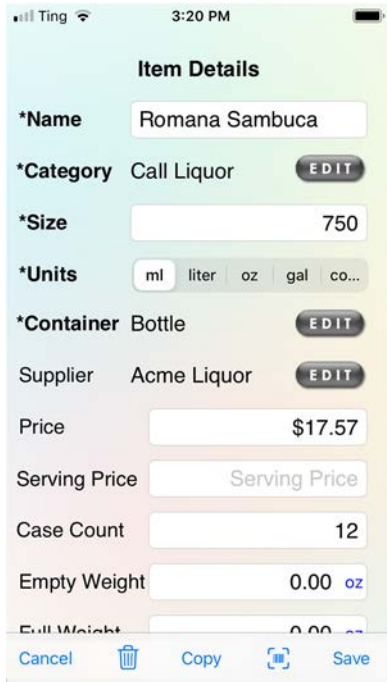
Adding New Items by Scanning (cont.)

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

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

Adding New Items by Searching

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

To begin searching, select **Items** (a) to go to the Items screen:

1. Press the search bar (b) at the top of the screen to activate the keyboard.
2. Begin typing the name of the Item you are searching for. (c)
3. If the Item is not already in your Items List, you will be given a choice to *Search Barkeep's Online Database* or *Add New Item* (manually).
4. Select *Search Barkeep's Online Database.* (d)
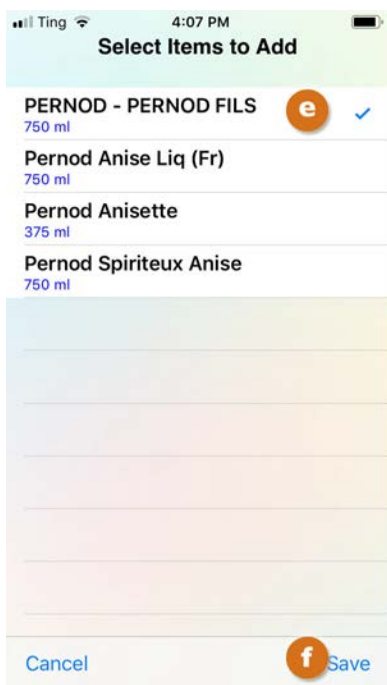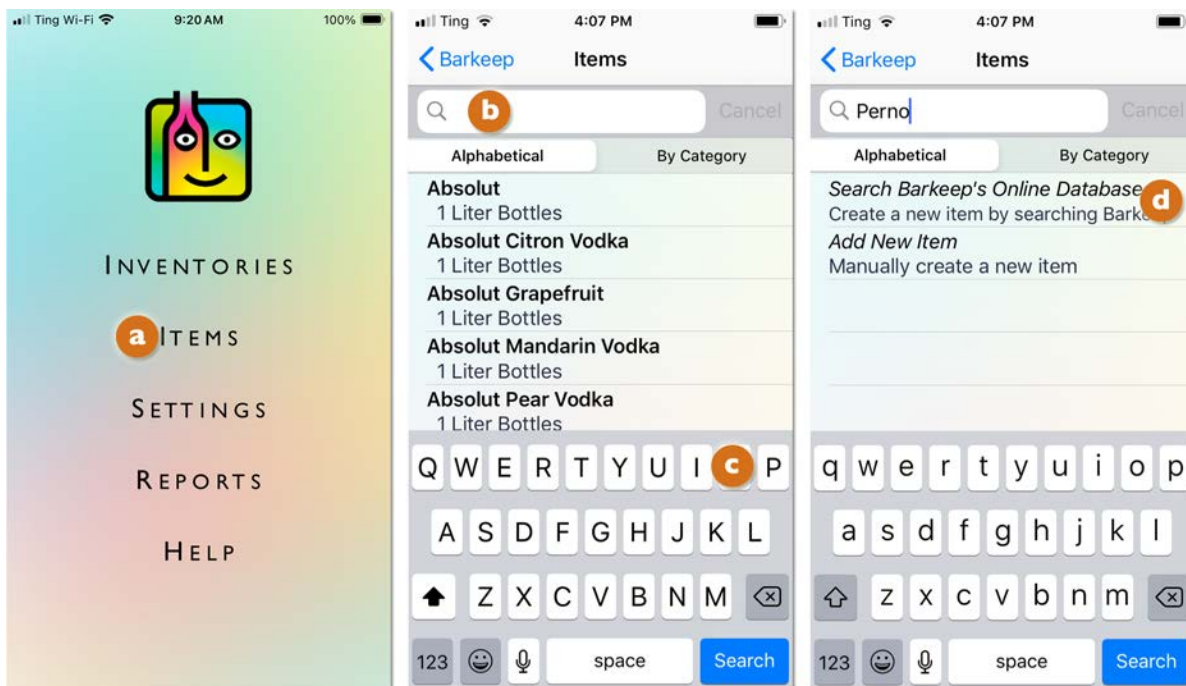
5. Select the Item(s) (e) you wish to add to your Items List.
6. The final step is to press **Save** on the bottom toolbar (f) or select **Cancel** to discard your changes.

Reminder: The Search Barkeep feature requires an Internet connection using either Wi-Fi 📶 or your phone's carrier network is required.

Adding New Items by Searching (cont.)

Searching for a more specific Item

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

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

You use the same steps shown on the previous page.
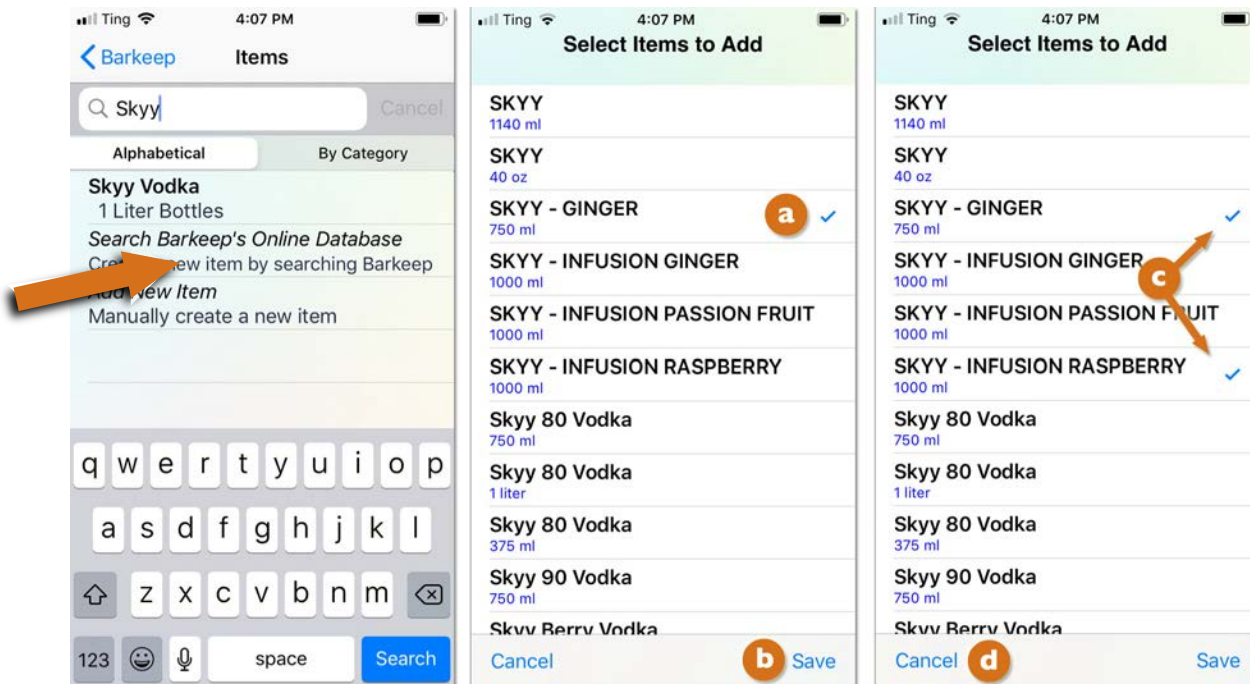
1. When using Search Barkeep to add new Items, you will be shown a list of the first 50 products, sorted alphabetically, that contain your search words.
2. The Items that you've selected to add have a check mark **a** on the right-hand side of the row to show that they will be added.
3. You add Items from this list by selecting the Items that you want to add and then press **Save**. **b**
4. Note that you can add several Items at once by selecting multiple Items **c** before pressing **Save**.
5. You can deselect an Item by pressing it a second time to uncheck it.   Only checked Items will be added to your Items list.
6. If you decide not to add any selected Items, press **Cancel**. **d**

Reminder: The Search Barkeep feature requires an Internet connection using either Wi-Fi 📶 or your phone's carrier network is required.

Adding New Items by Searching (cont.)

Search Tips

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

- ✓ *Be as specific as possible.* Typing the entire word will help eliminate unwanted matches. For example, if you are searching for a new flavor of **Hangar One Vodka** it is better to search for "Hangar" or "Hangar One" than "Han."
- ✓ *Search for unique words.* For example, if you are searching for the new **Absolut Acai Vodka** it may be better to search for "Acai" than "**Absolut**."
- ✓ *Enter at least three characters.* BarkeepApp will not perform a search with less than three characters.
- ✓ *Lower or upper case doesn't matter.* BarkeepApp will search for any products that contain the word that you've entered anywhere in the product name, regardless of capitalization.
- ✓ *Check the size!* Many searches will come back with the same Item in different sized bottles. Be sure to choose the product with the correct size. For example, you do not want to choose **Absolut 750ml** if you carry the standard **Absolut 1l** bottles. Make sure to double-check this when you add the Items to your Inventory, or your Usage Reports will be inaccurate.
- ✓ *Beware of punctuation differences.* For example, a product may be listed as either **Hangar One** or **Hangar-One** depending on the manufacturer-released data. So, if you are searching for a product and including punctuation like spaces or dashes, you may have to try more than one time before finding the product you want. It will probably be quicker not to use punctuation when searching for an Item.

> **Don't forget to review new Items after your Inventory!**
> When you add Items to an Inventory by Searching the Barkeep Database, we recommend reviewing the new Item(s) in your Items list after you have completed the Inventory.
> You will need to add a Category as well as other details in order to generate accurate Reports.

Adding New Items by Copying
an Existing Item

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

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

To create a new Item by copying an existing Item:
1. We recommend you search the Barkeep Database first to be sure the Item does not already exist.
2. Next, you begin by finding the Item you wish to copy. Select the Item **a** from the Items List.
3. This will take you to the Item Details screen.
4. Press to **Copy** to create the new Item. **b**
5. Select **Yes** **c** to confirm your choice.
6. You will notice all the details are the same for the copied Item, except the name now has a number 1 at the end.
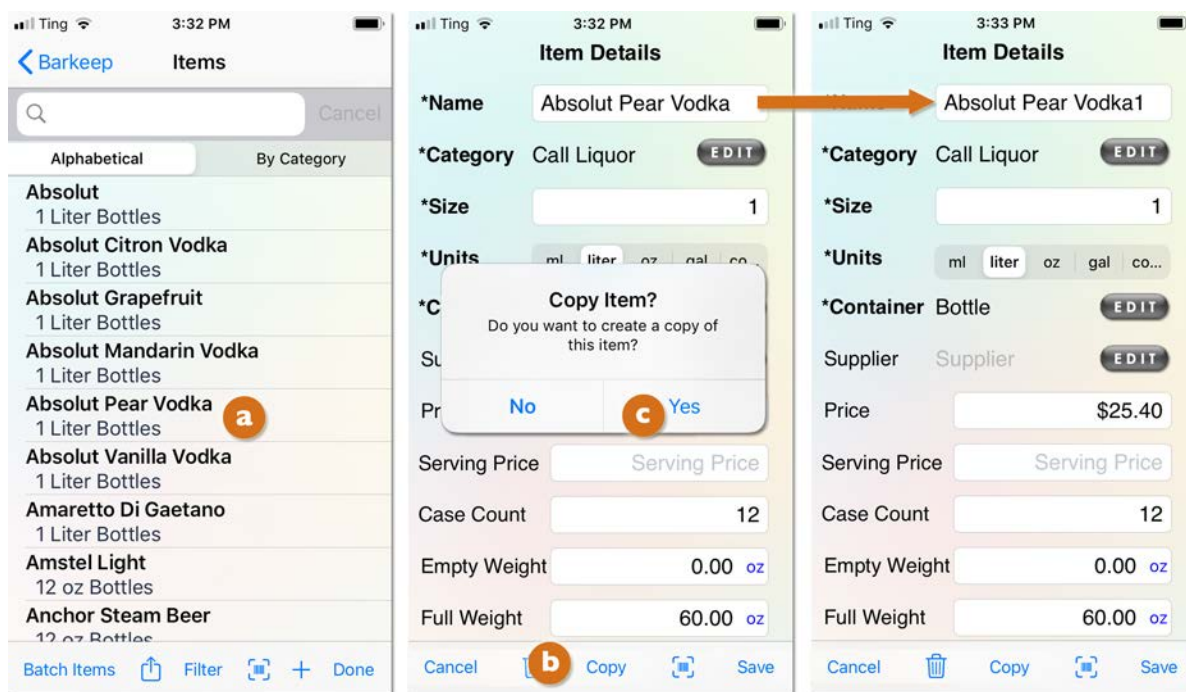
7. Now make the necessary changes to your new Item.

Adding New Items by Copying (cont.)

8. Modify the name of the copied Item. **d** In this example it's changed to **Absolut Mango**.
9. You can make other changes to the new Item's details, e.g., Category, Size, Units, etc. **e**
   Note: The detail fields with an * are required. The other information is optional.
10. Barkeep will remove the existing barcode(s) when you copy an Item.
11. You will need to scroll down and add a new barcode **f** by scanning the new Item. You also can enter it manually.
12. Once you have finished entering details for your new, copied Item, you can save your changes by pressing **Save** on the bottom toolbar **g** or select **Cancel** to discard them.
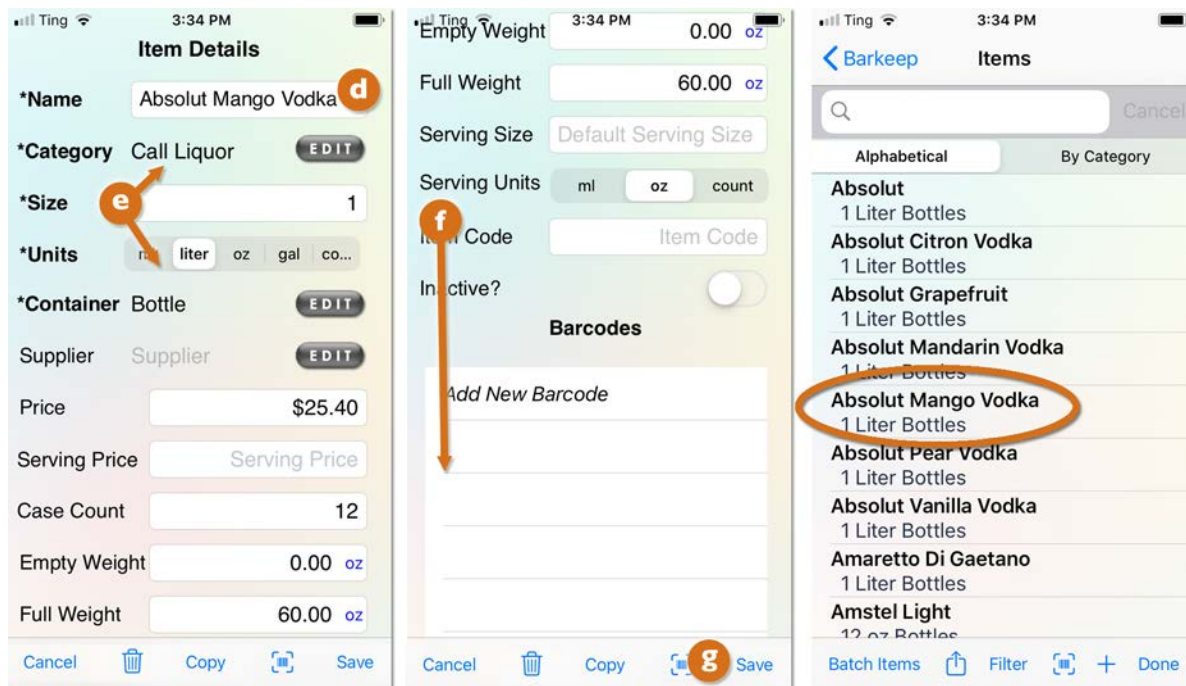
Note: See the **Support Section** at barkeepapp.com for a guide with tips for managing **Products with Different Sizes and Varieties**.

Adding New Items Manually

Search or Scan First
Before you choose to add an Item manually, we recommend you search **a** the Barkeep Database first.

Below is an example of a search that did not find the Item you would like to add. Select "**Ok**" **b** and now choose to *Add New Item* manually. **c** You will be taken to a blank, new Item Details screen. **d**

> **Note:** Item Details where the field name has
> an * asterisk are required.
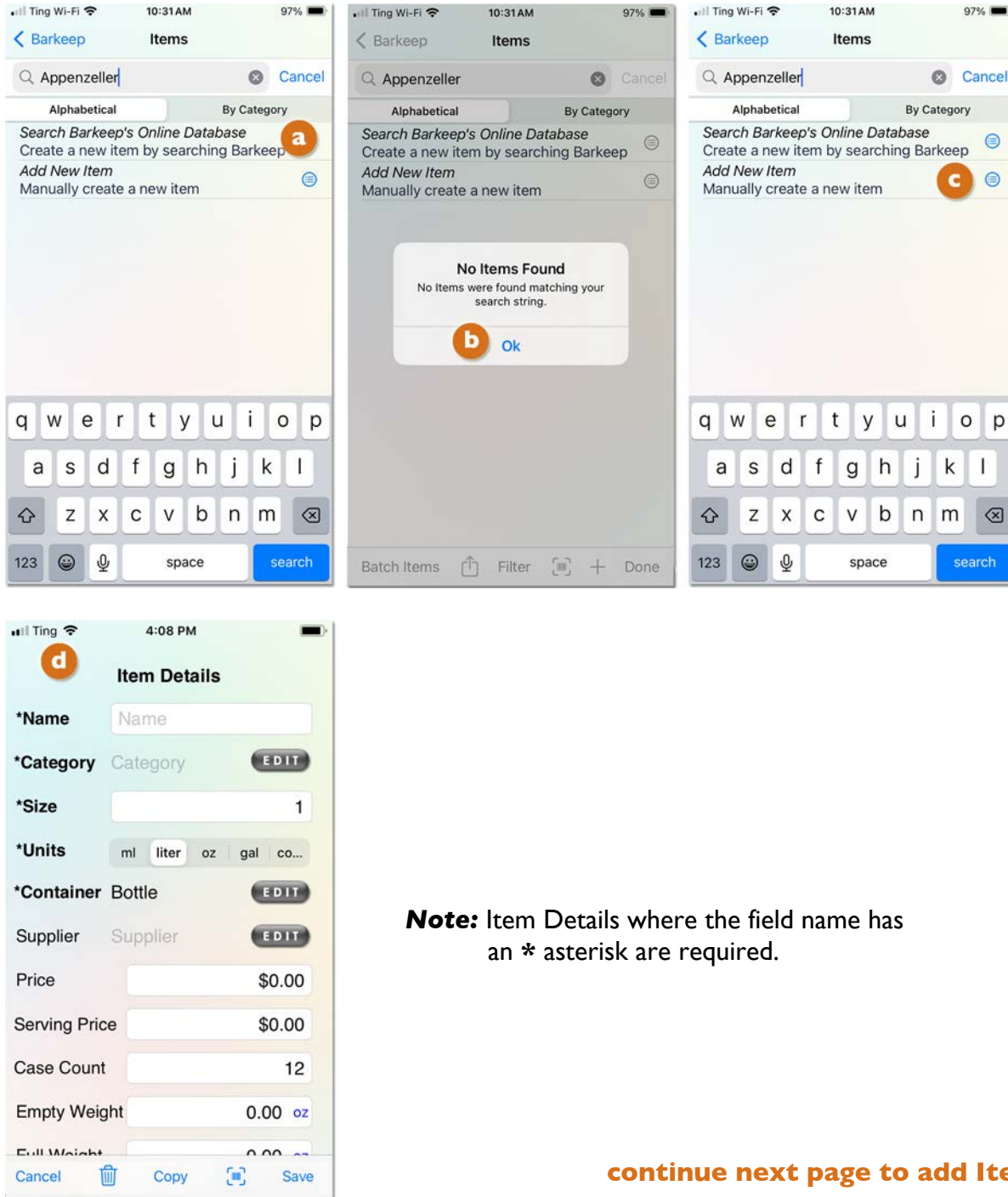
Adding New Items Manually (cont.)

To add an Item manually:

1. Select "Items" **a** on the Main Screen.
2. On the Items screen, select the ➕ icon **b** in the bottom toolbar.
3. You will see a blank, new Item Details screen. **c** Press the name field **d** to activate the keyboard.
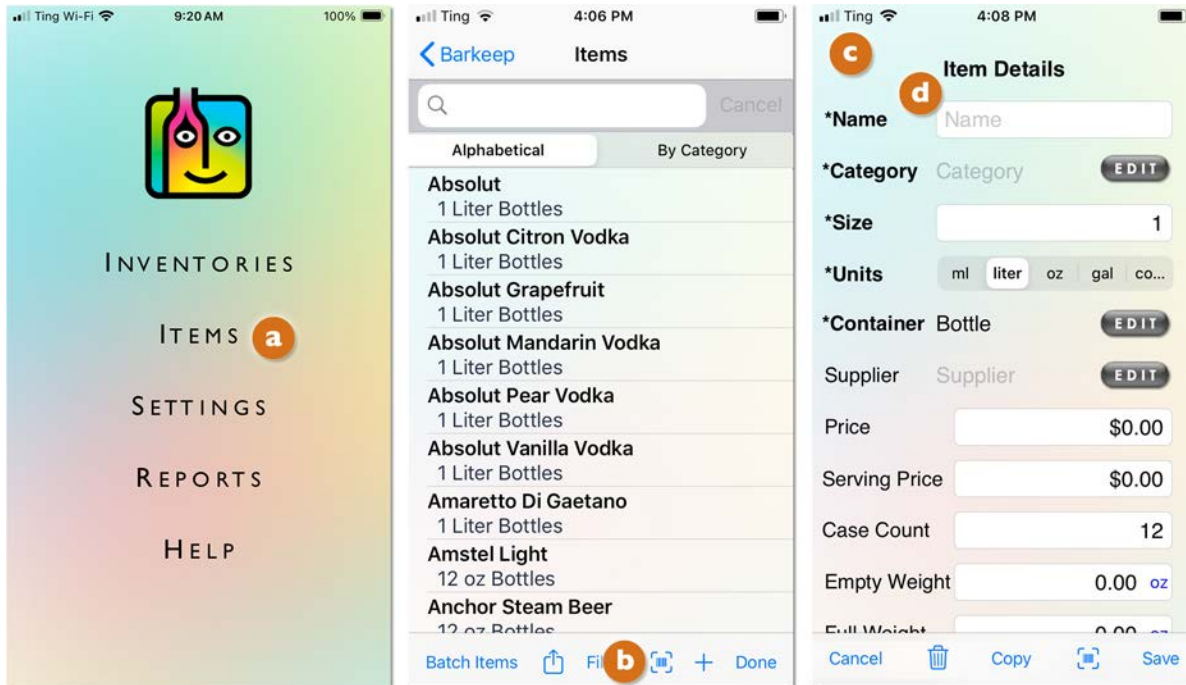
4. The Item Details screen allows you to enter the details **e** for a new Item that you create manually or modify the details of an existing Item. Details with an asterisk * are required.
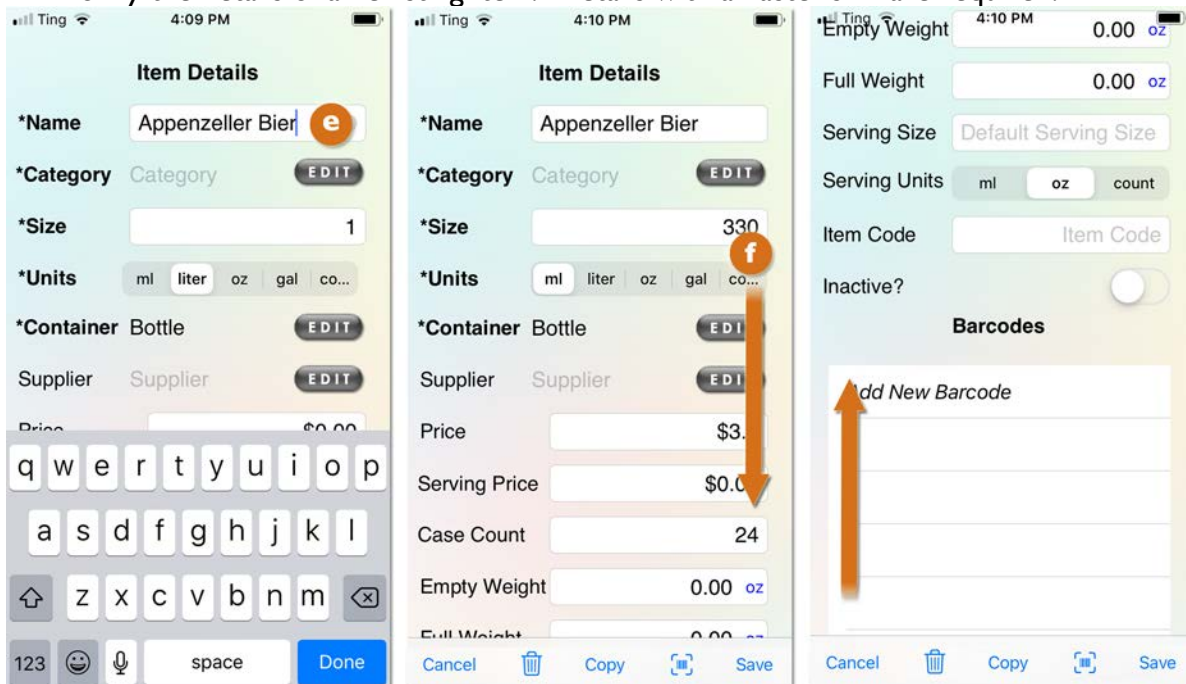
Note: that the Item Details screen SCROLLS down. **f** There is more data to be entered on the Item Details screen than can fit on a single screen. To enter the Full Weight, Serving Size, etc. you need to scroll down to these fields.

Adding New Items Manually (cont.)

5. Selecting a Category for your new Item is another important detail you must add.
   See the previous **Categories Section** for more information.
6. Press the ▐ EDIT ▌ button next to the Category field. **g**
7. Choose a Category **h** (e.g., Imported Bottled Beer).
8. Press to **Save** your selection. **i**
9. You can continue adding Item Details for your Item.
   Note: The details with an asterisk ✱ are required and crucial for you to use Barkeep effectively.
   Each Item needs a Name, Category, Size, Units of Measure and a Container Type.
   The following pages will explain these Item Properties further.
10. Once you have finished entering details for a new Item, or modified an existing Item, you can save your changes by pressing **Save** on the bottom toolbar **j** or select **Cancel** to discard them.
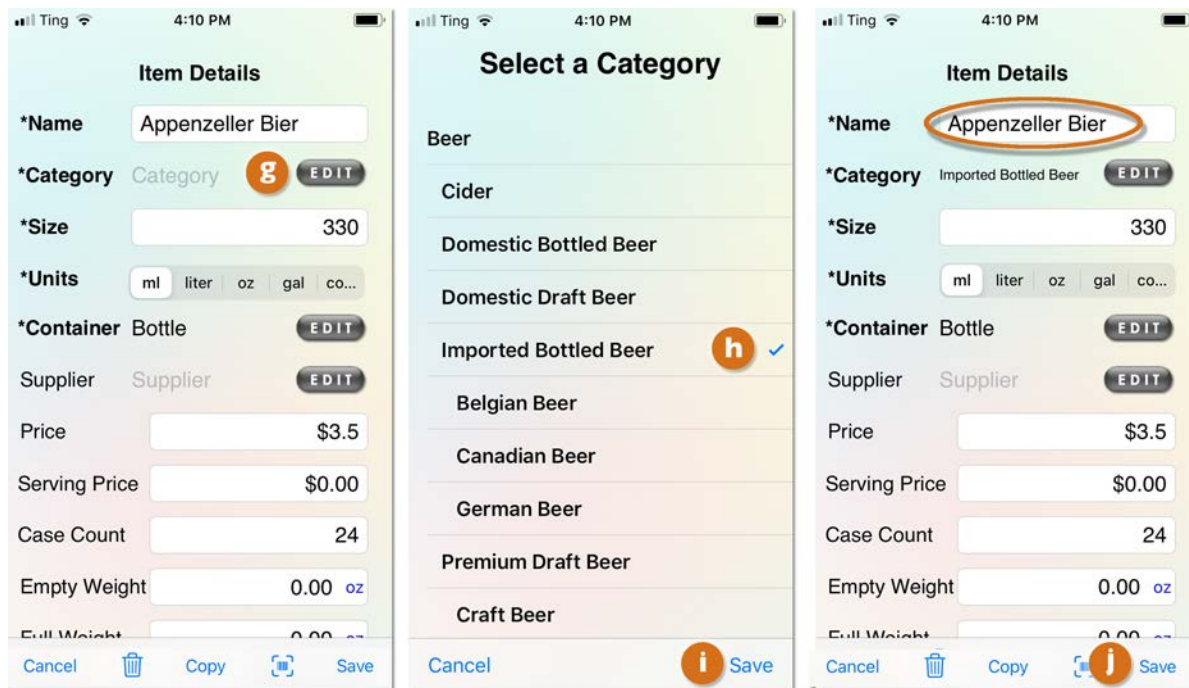
Note: You can return to any Item later to make changes or add more details.

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

Adding Barcodes to Items

Assigning barcodes to Items is optional. If you plan to scan barcodes when taking Inventory, you must make sure the Item Details includes a barcode. To scan and add a barcode to an existing Item:

1. Select the Item from your Items List.
2. After selecting the Item, you will be taken to the Item Details screen.
3. On the bottom toolbar **a** of the Item screen press the scan icon to activate your Device's camera or **Linea Pro** scanner. The scanner will beep to indicate the barcode has been successfully scanned and added to the Item Details.
4. Barkeep will take you to the Barcode Details screen.   Press to **Save** **b** the barcode or select **Cancel** to discard the changes.
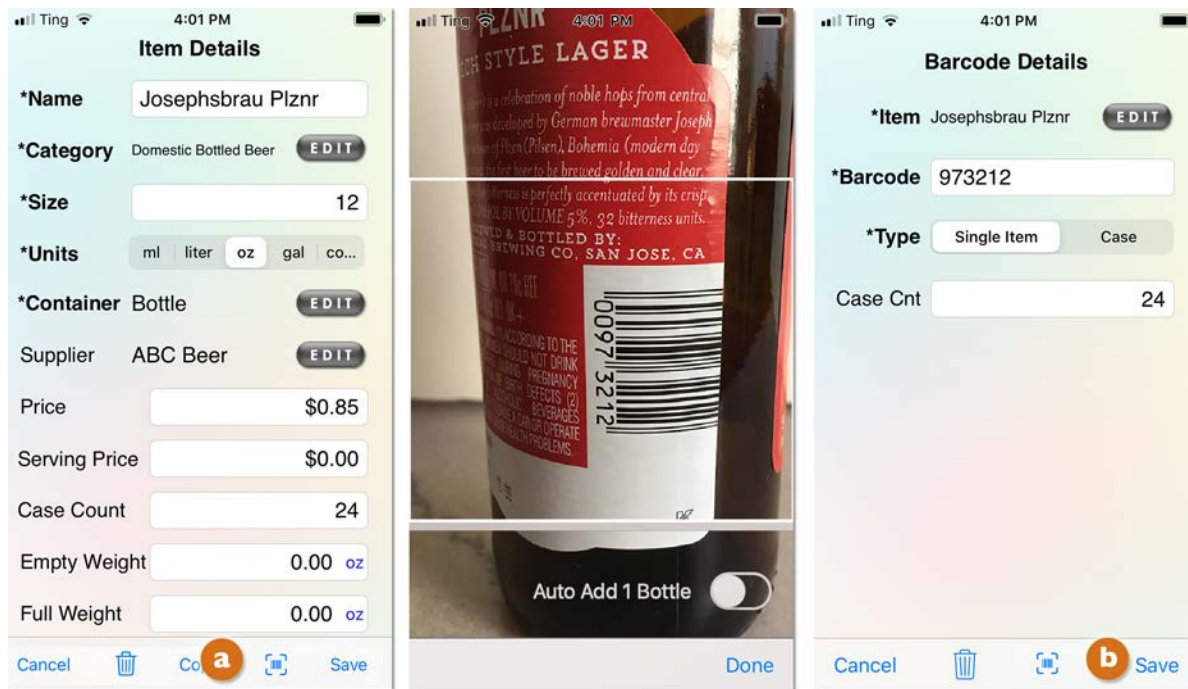
Note: You can also scroll down in the Item Details screen and add the barcode manually.

Multiple Barcodes

What if I need to add more than one UPC barcode to an Item?
You may assign different barcodes for the same Item. For example, many manufacturers have a barcode for a single bottle as well as different barcodes for a case of 6 bottles and 12 bottles, etc.
See the **Receiving Inventories Section** for specific instructions.

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

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

Adding/Modifying an Item's Category

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

To an add or modify a Category for an Item:
1. Select the Item from your Items List and press [EDIT] on the Items Detail screen. **a**
2. Select a Category **b** and press to **Save** your selection. **c**
3. You can make additional changes to the Item Details. Once you have finished modifying details for the Item, you can save your changes by pressing **Save** on the bottom toolbar **d** or select **Cancel** to discard them.
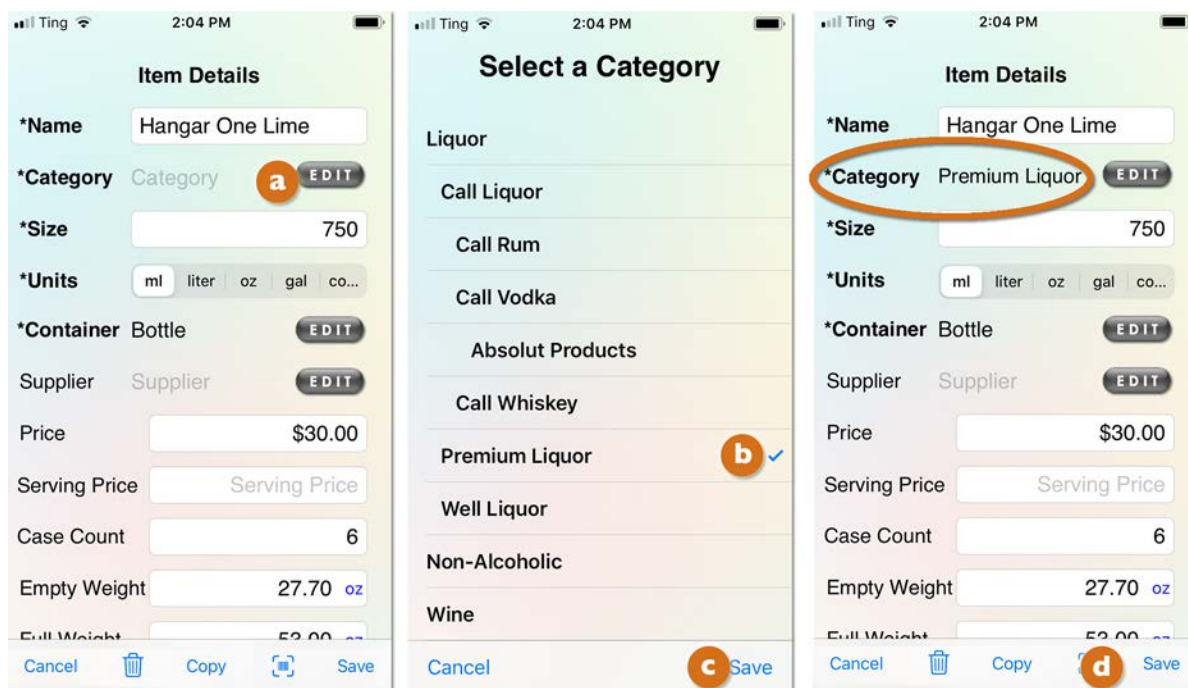
Reminder: BarkeepApp is automatically installed with a set of standard Items that are commonly used in most bars – like **Absolut Vodka** and **Budweiser Beer**. We start out by keeping the number that is installed on your **iOS** Device as small as possible. The pre-installed Items are assigned Categories, but you may change the Category for <u>any</u> Item.

Adding/Modifying the Container Type

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

Note: You may have many products with identical brand names, (e.g., **Budweiser**) but you will have to have separate Items in Barkeep such as **Budweiser** (12 oz. bottles) and **Budweiser Keg** (15.5 gallon kegs).

To add or modify a Container Type for an Item:
1. Select the Item (a) from your Items List and press ▢EDIT▢ on the Items Detail screen. (b)
2. This will activate the "Choose a Container Type" picker. (c) Select a Container Type.
3. Press to **Save** your selection. (d)
4. You can make additional changes to the Item Details. Once you have finished modifying details for the Item, you can save your changes by pressing **Save** on the bottom toolbar (e) or select **Cancel** to discard them.
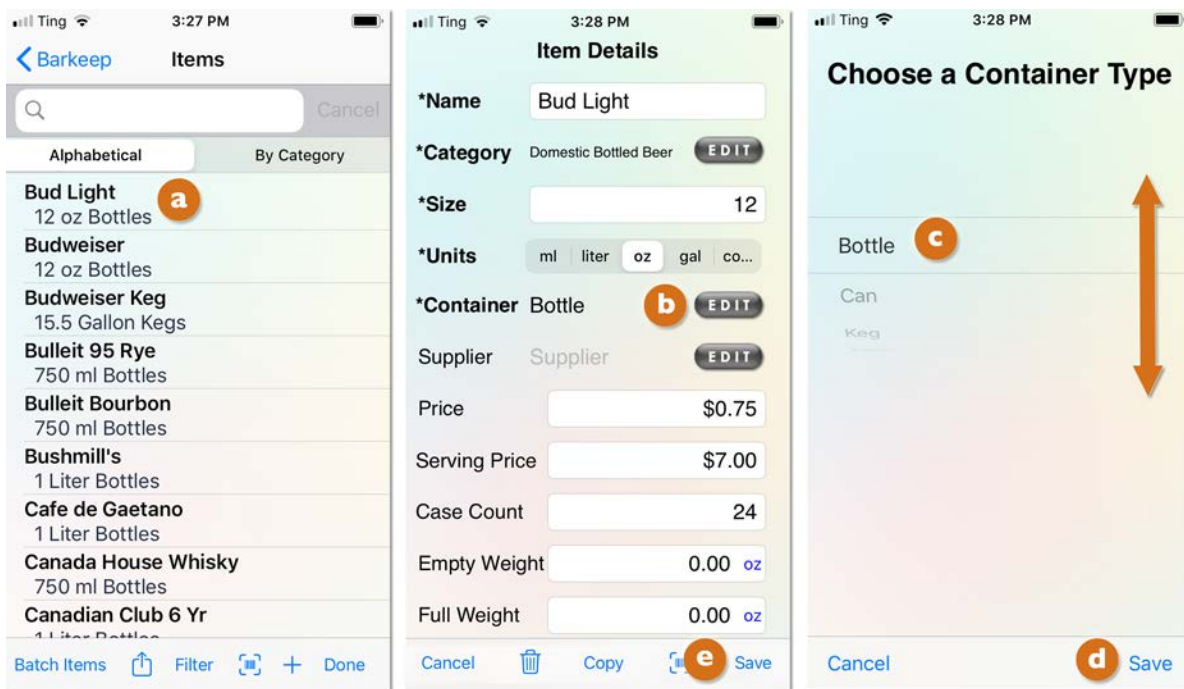
Item Properties

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

In the Item Details Screen, the Item Properties, or details, with an asterisk ***** are required and crucial for you to use Barkeep effectively. Each Item needs a:
- ✓ Name
- ✓ Category
- ✓ Size
- ✓ Units of Measure
- ✓ Container Type

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

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

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

Property	Description
Name	The name of the Item. This should be descriptive enough to differentiate between different products. For example, **Kendall Jackson Vintner's Reserve Chardonnay** instead of **Kendall Jackson Chardonnay**.
Category	Categories are used to group Items for Usage Reports, Variance Reports and Pour Cost analysis. It is important that you align your Categories with the way that you capture Sales Data to make effective Pour Cost analysis possible.
Size and Units	The size and units of measure for the bottle or other container type. For example, 750ml, 12 oz, 1.5 gallons, etc.
Container	Choose the container type for the Item. Containers can be one of Bottles, Cans, Kegs, Each. Boxes, Bags in Box or Cartons.

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

Serving Prices and Serving Sizes

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

- How many Servings were consumed in both Usage, Variance and Pour Cost Reports[3].
- The Retail Value of the liquor consumed in both your Usage and Pour Cost Reports.

This is a great way to get a sense for how much Sales you should have gotten based on the quantity of liquor used. By comparing this to your actual Sales, you can quickly determine whether or not your Sales figures are consistent with how much liquor has been used.

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

- **Can a Category have a Serving Size and Price?**

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

- **What if an Item's Serving Price is different from the other Items in the Category?**

  Setting a different Serving Size and Serving Price for an Item will override the values set for that Item's Category.

  For example, if the price for **Michelob Draft** was $6.00 (b) instead of the Category price of $5.00.

- **Can you set a Serving Size without a Price?**

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

---

[3] Variance Reports and Pour Cost Reports are a feature available only to BarkeepOnline subscribers

Serving Prices and Serving Sizes (cont.).

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

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

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

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

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

Finding Items

In the Items screen, you can search for Items by typing part of the Item name in the search bar. **a**

As you type, the Items List will automatically reduce to show only Items containing the letters typed into the search bar.

You can also view the Items List **b** Alphabetically or **c** By Category using the sort buttons located directly below the search bar.
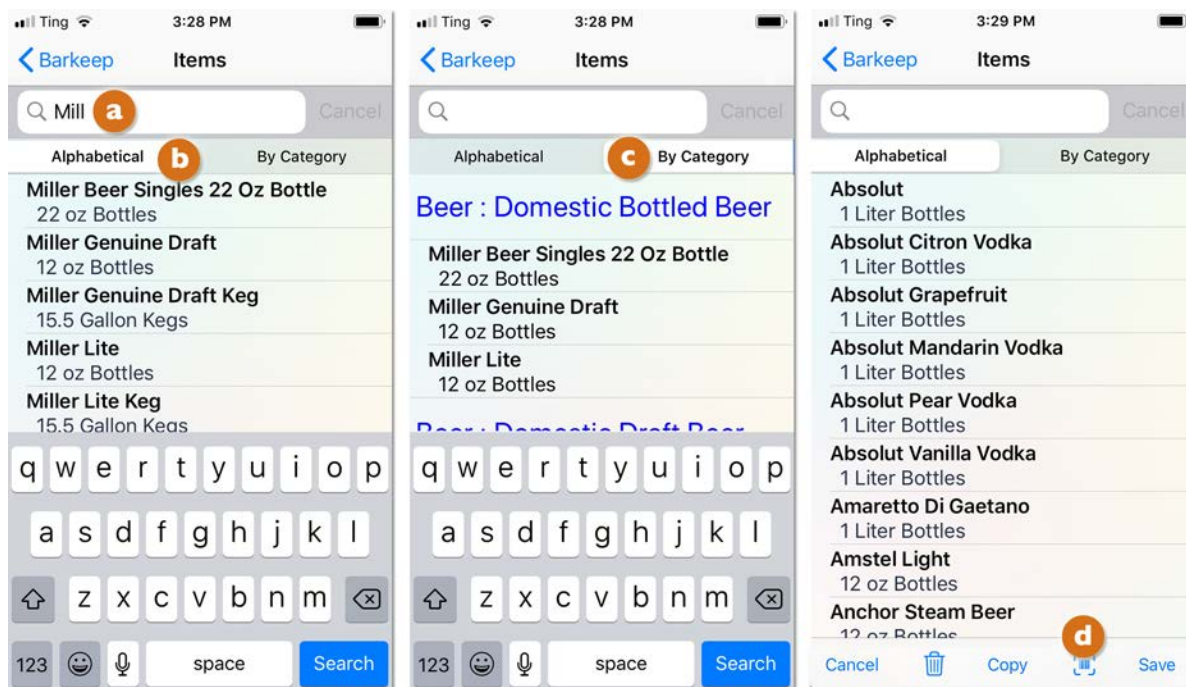
Note: You also can scan **d** the bottle's barcode to find the Item.

Editing Items

To edit an existing Item:
1. You begin by finding or scanning (a) the Item as shown on the previous page.
2. Press the Item (b) you wish to edit on the Items List.
3. This will take you to the Item Details screen where you can change the information for the Item.
4. Press to **Save** the changes or select **Cancel** to discard them. (c)
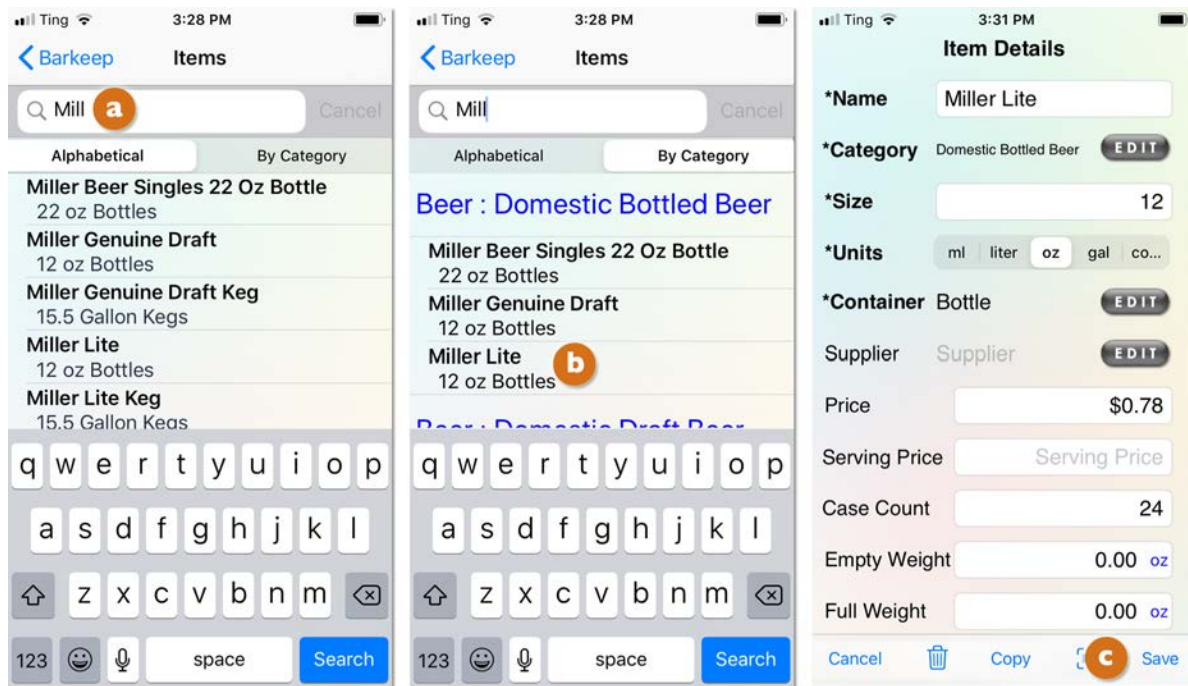
Note: For detailed instructions for adding Full Bottle Weight and Empty Bottle Weight information to an Item see the **Bottle Weight Section**.

Items Report

You can generate a report containing your Items list by pressing action ⬆ icon **a** on the bottom toolbar and then selecting **Items Report**. **b** BarkeepOnline users can download this report as an Items List.
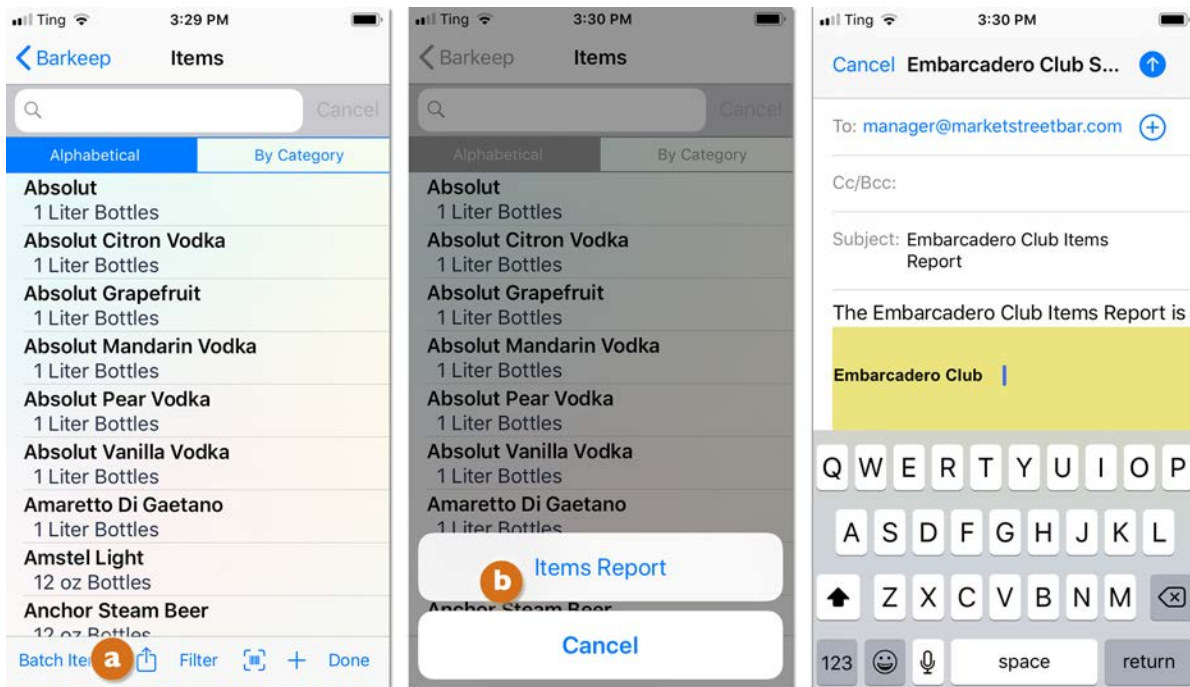
For more information see the **Suppliers Section**.

Deactivating and Deleting Items

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

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

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

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

1. You begin by finding the Item.
2. Press the Item **a** you wish to deactivate on the Items List.
3. This will take you to the Item Details screen where you can change the information for the Item.
4. Scroll down **b** the screen and you will see the switch with the question: "Inactive?"
5. Switch ⬤ to the on position. **c**
6. Press to **Save** the changes or select **Cancel** to discard them. **d**
7. When you press **Filter**, **e** you can select an option to **Show Inactive Items** in your Items List.
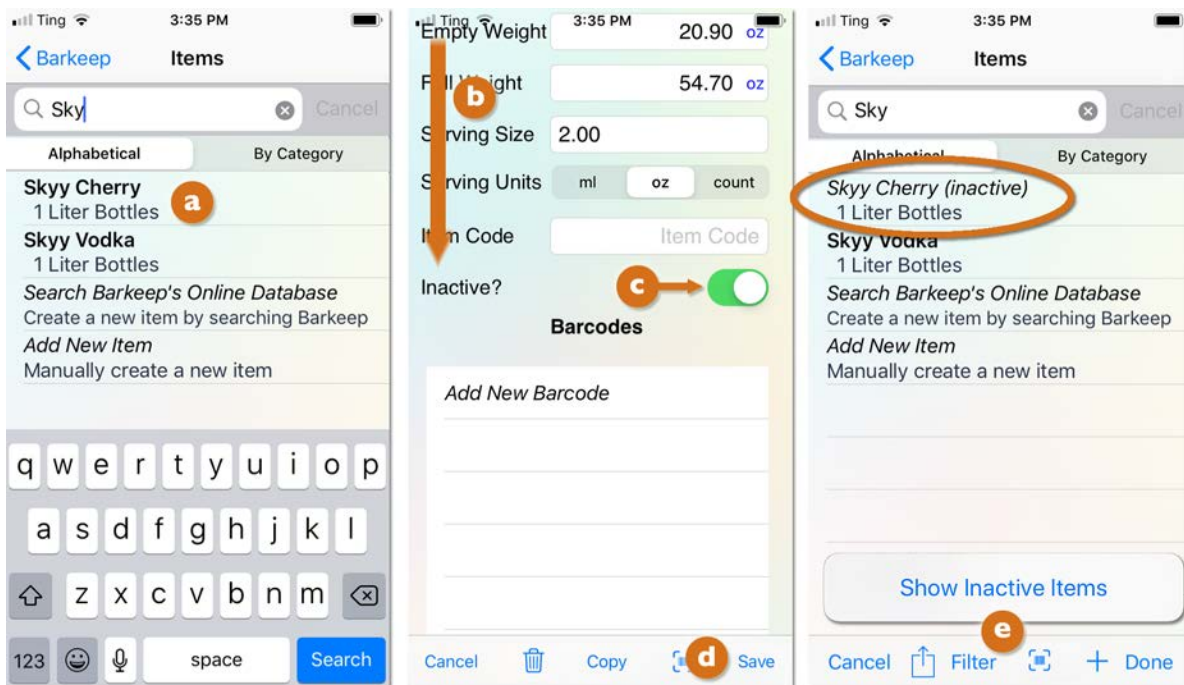
Note: To reactivate an Item, you simply follow the steps shown above but switch to the off position. If you are managing your Items List and scan the barcode of an inactive Item, the Item details screen will appear, and you can switch the Item to active again.

Deactivating and Deleting Items (cont.)

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

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

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

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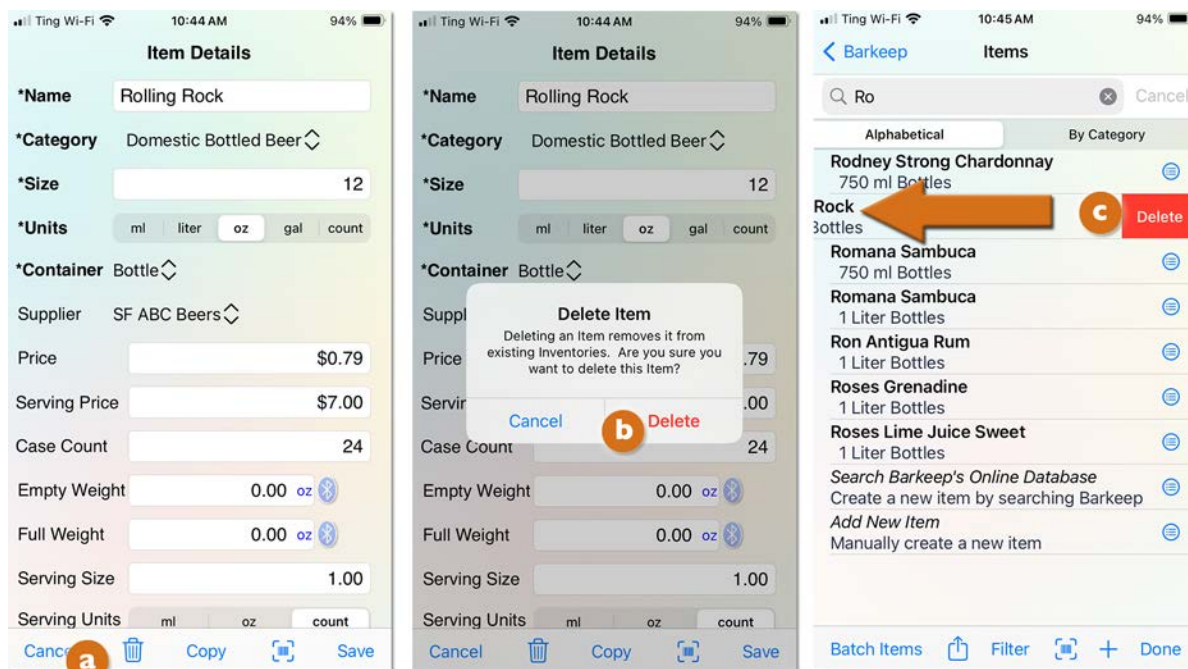
Inventories

Barkeep allows you to create six different types of Inventories.

Full Inventories

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

Transfer Inventories

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

Waste Inventories

Used to track when liquor is lost rather than used. If waste or breakage occurs, you must do a Waste Inventory.
For example, if a case of **Budweiser** was dropped in the **Store Room** on the morning before the final Full Inventory, you need to do a Waste Inventory to show what happened to that product. Waste Inventories differentiate between liquor that has been wasted or lost and liquor that has been sold and are crucial for determining an accurate Pour Cost.

Empties Inventories

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

Receiving Inventories

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

Return Inventories

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

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

Starting Inventories

Full Inventories and other Inventories

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

1. To create an Inventory, press Inventories on the Main Screen to go to the **Inventories screen**.
2. Next, press the ➕ icon on the bottom toolbar on the Inventories screen **a** to create a new Inventory.
3. On the Create Inventory screen, **b** choose the type of Inventory you would like to create.
4. You can also set various details for the Inventory like the Date/Time the Inventory was taken, a general description of the Inventory, etc. For an explanation of each of these properties, see the **Editing Inventories Section**.
5. Press **Start Inventory** to save the new Inventory or select **Cancel** to discard it. **c**
6. After you have saved and started the new Inventory you will automatically navigate to the Inventory screen where you can start adding **d** Items to your Inventory by scrolling, searching or scanning.
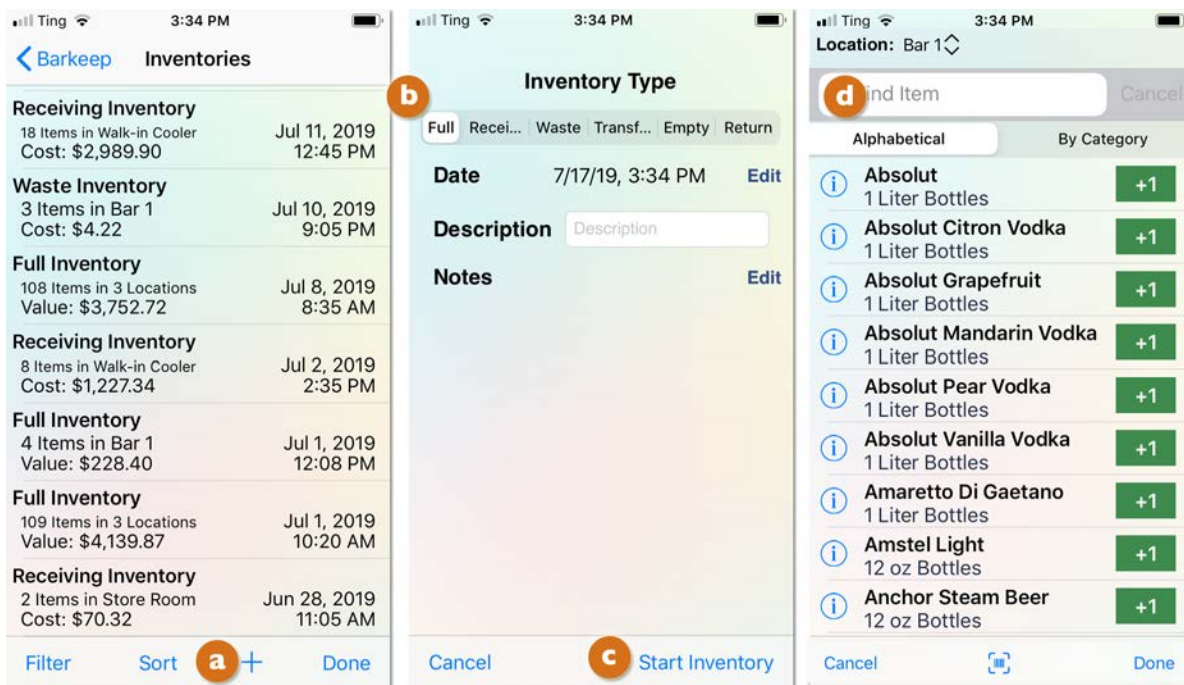
Note: The **Support Section** on the Barkeep website has a document with more **Inventory Tips**.

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

Adding Items to Inventories

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

There are two ways to add Items to an Inventory:
- **By Name** – You can scroll/search and add Items by name
- **By Scanning** – You can scan the Item's barcode

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

New Feature: **Quick Add to Inventories**

BarkeepApp 6.0 introduced a Quick Add feature. It lets you immediately add a quantity of one (1) bottle when scrolling through their list of Items. Simply press the green `+1` button. **a** An alert will sound, and a pop-up confirms which Item will be added to the Inventory. Press **Done** **b** or simply wait a moment and the Item will be added automatically. Or, select **Cancel** to stop the Item from being added to the Inventory.

- If you need to add a different quantity, add a case(s) and/or weigh a bottle, do <u>not</u> press `+1`. Select the Item and add the quantity or weight in the regular pop-up screen.
- You cannot add cases with the green `+1` button.
- If you accidentally add an Item with the green `+1` button, you can simply delete that Item from the Inventory.
- If you wish to disable the Quick Add feature, you can turn it off **c** in the General Settings.
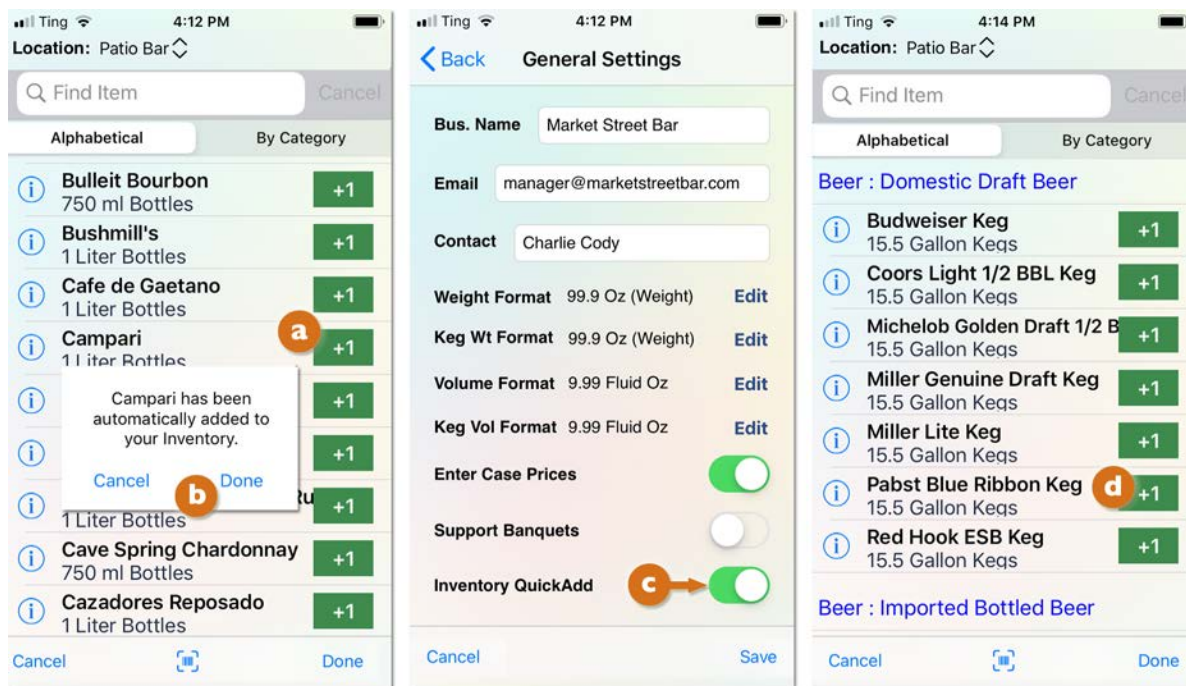
Note: When pressing the green `+1` button, Barkeep will add a quantity of one (1) bottle unless the container type for the Item is specified as a can, keg, box, etc. For example, when you press the green `+1` button next to **Pabst Blue Ribbon Keg**, **d** Barkeep will automatically add the quantity of one (1) keg.

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

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

(a) When you have bottles of the same Item in different Locations (e.g., **Bar 1**, **Bar 2**, etc.), you enter them separately.

(b) If you weigh bottles, you will need to make separate entries for full bottles and an entry for <u>each</u> individual partial bottle.

(c) When you enter partial bottles, you should add each one separately. We do not recommend manually adding up partial bottles into one entry. For example, if you have two partial bottles of **Dewar's White Label**, one that is .2 Bottle and one that .65 Bottle, do not create a single entry with an amount of .85 Bottles. Add each bottle separately.

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

(e) If you have full cases <u>and</u> bottles in the same Location, you should always have separate entries for the cases and the bottles.

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

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

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

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

Adding Items by Name

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

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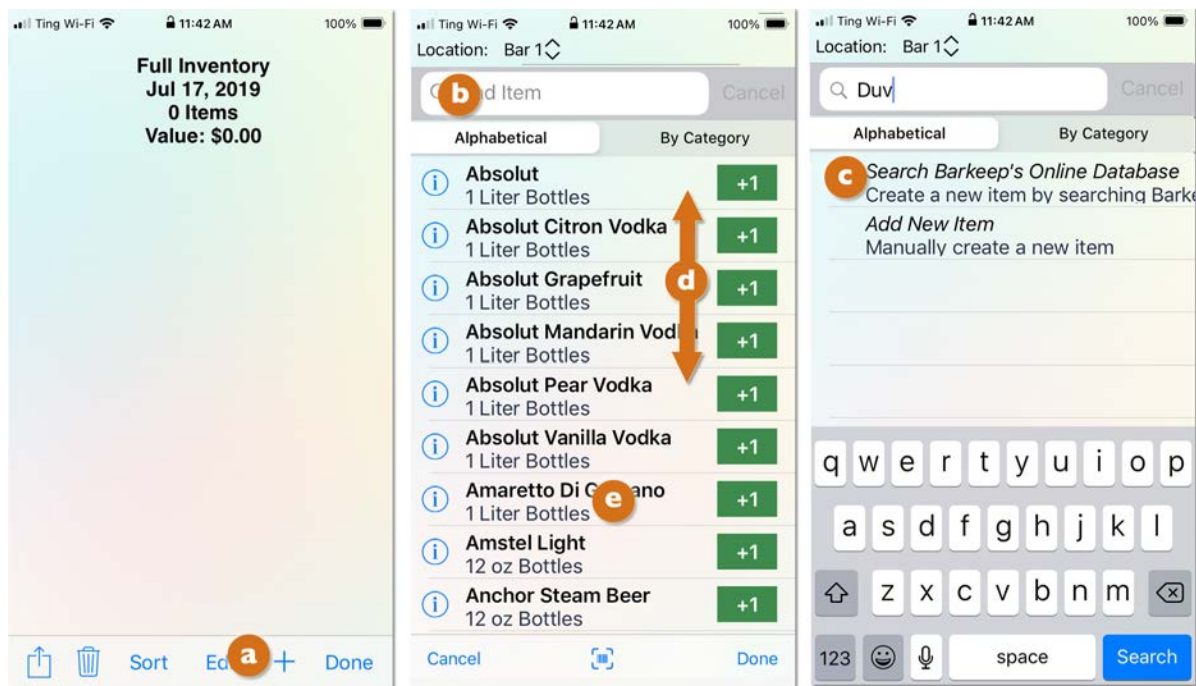
4. Or you may scroll through the Items List **d** and select Items to add.
5. You can press the **+1** button for the Item to add a quantity of **1**.
6. If you need to add a quantity other than **1**, choose the Item, **e** you will be taken to the pop-up Inventory Item screen.

Adding Items to Inventories (cont.)

7. After choosing an Item, **f** you will be taken to the Inventory Item screen.
8. Enter a quantity **g** and press **h** the **ADD** button.
   Notice that the product you are adding and the Location that the product will be added to are displayed at the top of the screen.
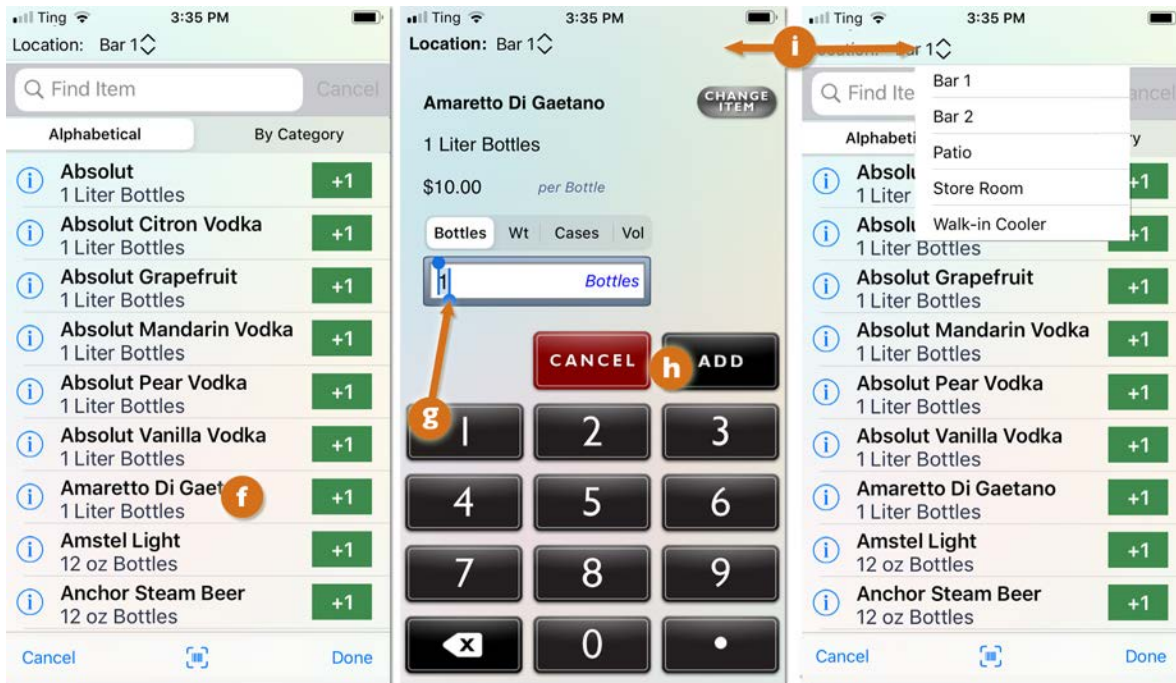
9. Once you've entered a quantity and pressed the **ADD** button, BarkeepApp will add the Item to your Inventory with the specified quantity at the chosen Location and return you to the Items list.
10. Repeat this until you have added all of your Items to the current Location.
11. When you are finished adding Items to the first Location in your Inventory, you can then move onto the next Location.
12. When you add the first Item in a different Location go to the top of the screen and use the drop down menu to change the Location **i** for the Item you are adding to the Inventory.
    Also, if you continue adding more Items to the Inventory, the Items will be added to your newly selected Location until you change to a different Location.

Adding Items by Scanning

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

To begin entering Items by scanning:
1. Go to the Inventory that you want to add Items to.
2. Press the ⊞ icon on the bottom toolbar on the Inventory screen **(a)** to add an Item.
3. On the Inventory screen, press the scan icon in the bottom toolbar. **(b)**
4. Pressing the scan icon will activate:
   a. The **Linea Pro** scanner if one is attached, or
   b. Your **iOS** Device's camera.[4]
5. The instructions for using a **Linea Pro** scanner are slightly different than when using your **iOS** Device's camera.
6. To continue using a **Linea Pro** scanner and to scan with the built-in camera .

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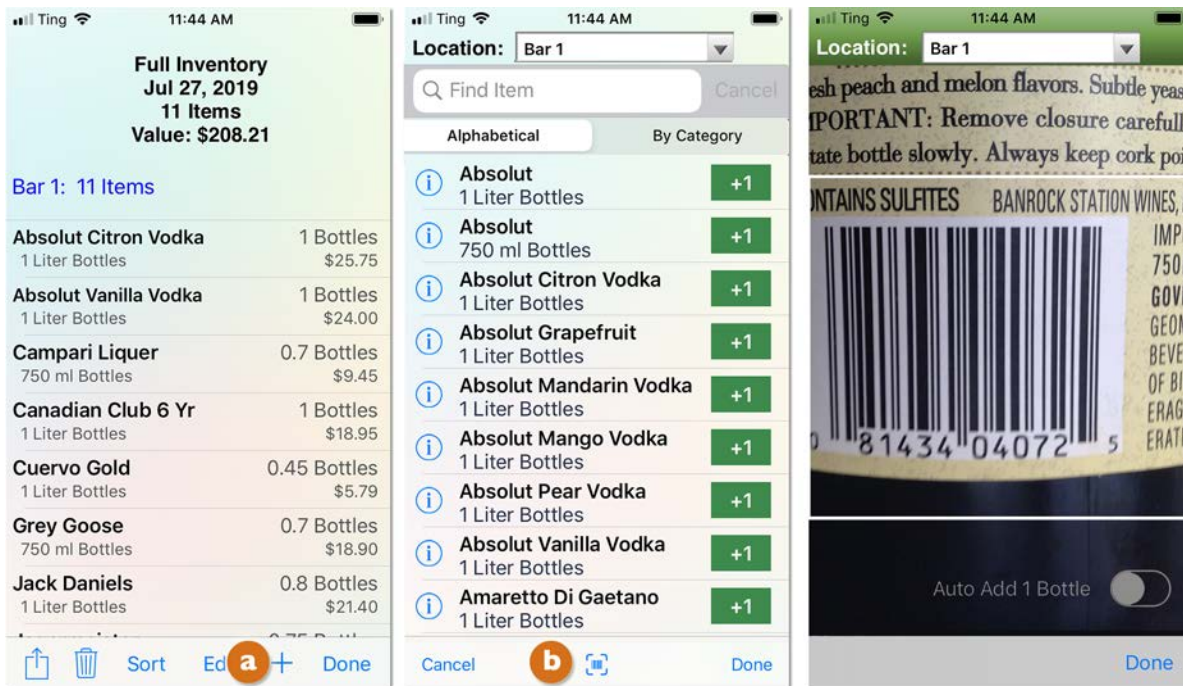
[4] If you do not have a scanner attached and/or you have an older **iOS** Device without a camera, the feature is disabled.

Scanning with the iPhone Camera

Barkeep supports scanning Items using the **iPhone**, **iPod Touch** or **iPad**'s built-in camera. To scan with your built-in camera, do the following steps:

1. On the Inventory screen, press the scan icon in the bottom toolbar to activate the camera.
2. Hold the **iPhone/iPod Touch** camera up to the barcode until the barcode is centered on the screen and holding the Device still while the barcode is scanned.
3. Once the barcode has been scanned, **(a)** BarkeepApp will match the barcode against products in your Device's Items List.
4. After the barcode is scanned and a matching Item is found, BarkeepApp will automatically go to the Inventory Item screen.
5. The default quantity of 1 appears (you can change the quantity).
6. Press the **ADD** button **(b)** to add the Item to your Inventory. BarkeepApp will add the Item to your Inventory with the specified quantity at the chosen Location (e.g., Bar 1) and return you to your Items list.
7. If you inadvertently re-scan the same Item, simply press the **CANCEL** button and it will not be added to the Inventory.
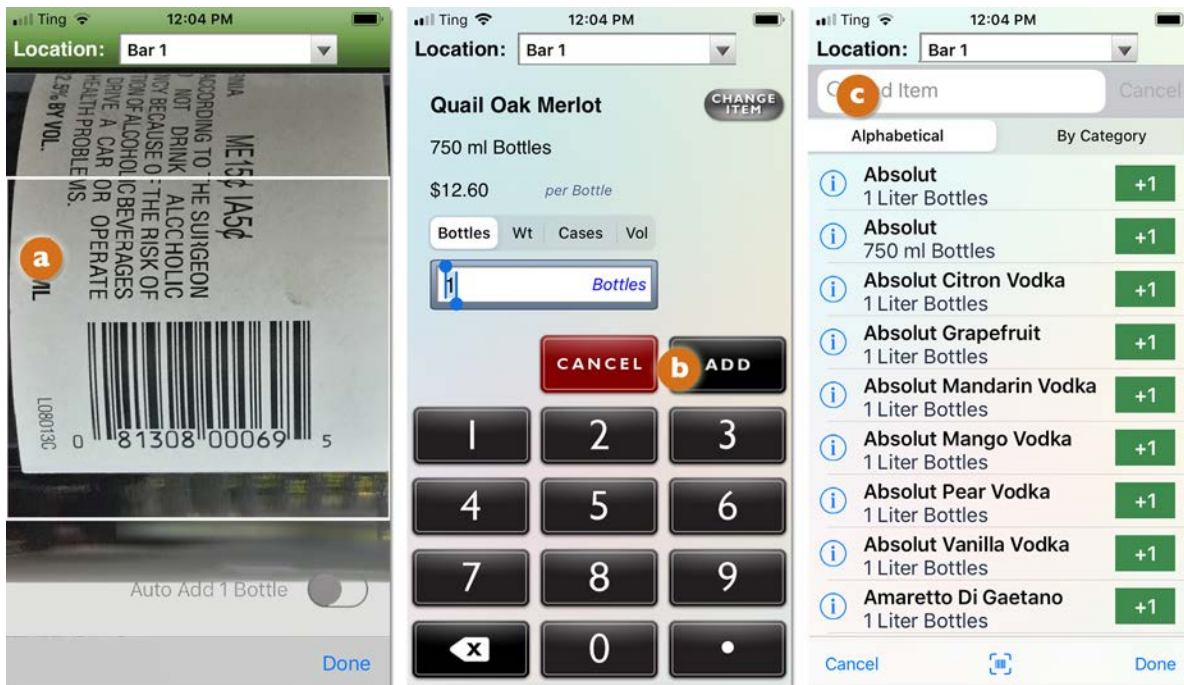
8. What happens if Barkeep does not recognize a barcode?
   If the Item is not found, you will always see a pop-up menu with three choices:
   - **Search Barkeep**
   - **Create New Item Manually**
   - **Add Barcode to Existing Item**

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

Scanning with the iPhone Camera (cont.)

Camera Settings
The very first time you use your **iOS** Device's built-in camera, you will be prompted with a pop-up message that asks: **"Barkeep" Would Like to Access the Camera**. You simply need to press OK.
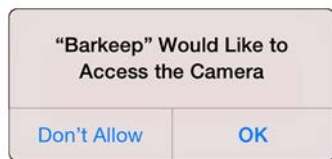
Note: See the **Support Section** at barkeepapp.com for detailed instructions for **iOS** Device camera settings with BarkeepApp.

Auto-Scanning with the iPhone Camera[*]

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

To auto-scan with your built-in camera, start with the following steps:
1. Auto-Scanning is switched off by default.
2. Select the scan icon **a** and activate the camera
3. Switch 🔘 the auto-scanning feature on. **b**
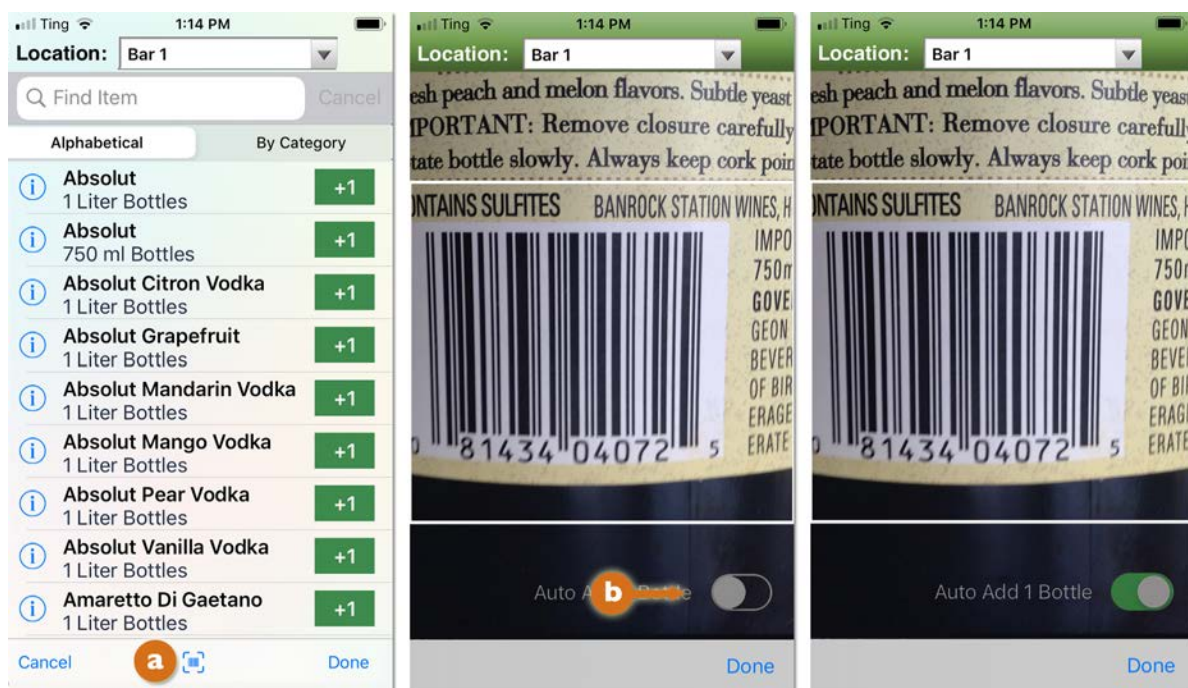
4. Now you are ready to start entering Items using auto-scanning.

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[*] Auto-Scanning occurs automatically when using a **Linea Pro** scanner – see the next section for details.

Auto-Scanning with the iPhone Camera (cont.)

5. As soon as Barkeep recognizes the barcode **c** you are taken to a new screen.
   A pop-up appears **d** and you have the following choices:

   - Simply do nothing, <u>ignore</u> the pop-up screen.
     In a few seconds, you will hear an alert signal indicating Barkeep has added a quantity of 1 to your Inventory of the scanned Item (**Quail Oak Merlot**).
     Barkeep will return to the scan screen and you are ready to scan the next barcode. **e**

   - The pop-up screen has three optional steps:
     - **f** **Edit** – For example, if you wanted to change the quantity.
     - **g** **Save** – Add the Item to your inventory and then continue scanning. **e**
     - **h** **Cancel** – Ignore the barcode you have just scanned and continue scanning. **e**

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

7. You can switch the auto-scanning feature off ⬤ to disable auto-scanning.
   For example, you probably would not want to use auto-scanning when you often select **Edit** because you are scanning partial bottles and need to adjust the default quantity of 1 after each scan.
   Note: We do not recommend using auto-scanning when you are scanning bottles and placing them on your digital scale to add the weight.
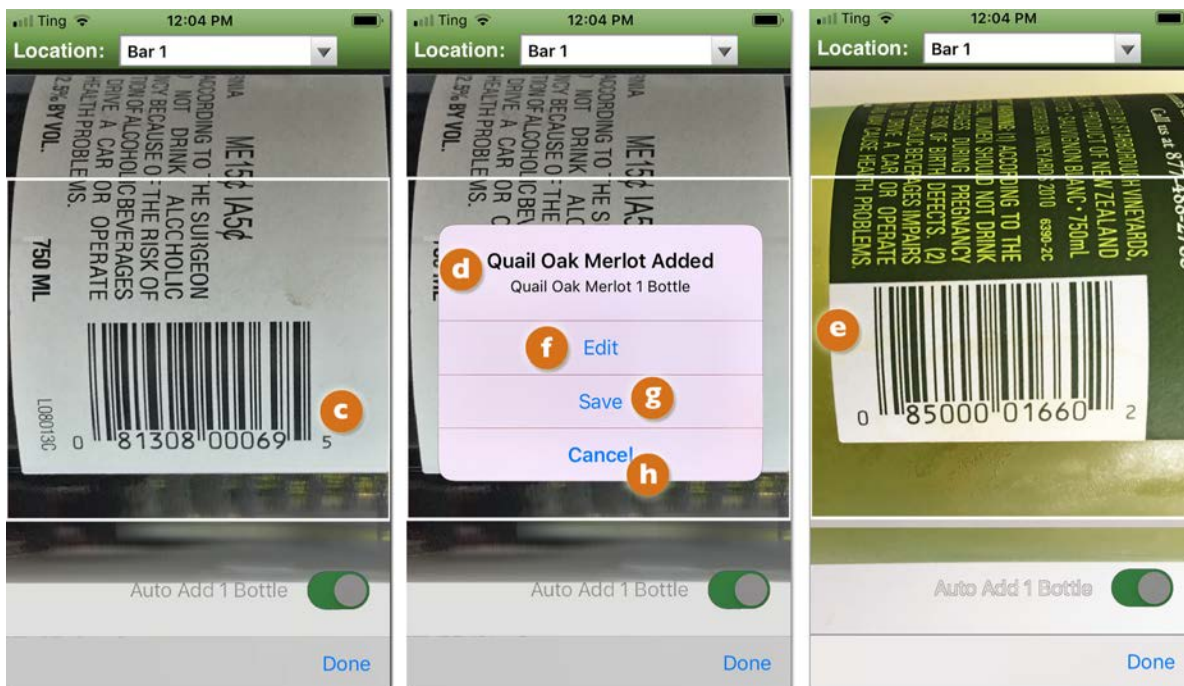
Tip: To get used to using the auto-scanning feature, we recommend setting up a sample Inventory and practice using the feature. Just remember to delete the sample Inventory when you are finished.

Scanning Items with a Linea Pro Scanner

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

Barkeep has integrated with the **Linea Pro** barcode scanner.[*] The **Linea Pro** is the same Device used in all Apple Stores to scan Items and process credit card transactions.

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

Compatibility:
- To scan Items using the **Linea Pro** scanner, you must be running BarkeepApp on an **iPod Touch**, **iPhone**.
- An **Infinea Tab** scanner is available for the **iPad** (see the **iPad User Guide** for details).
- The **Linea Pro** only works with the **iPhone 5s** and **6s, iPhone SE**, **iPhone 6** or later
- and the **iPod Touch 6th** or **7th generation**.
- A **Linea Pro** for **iPhone Plus** models is available by special order
- The **Linea Pro** will not work with earlier models.
- The **Linea Pro** will not work with **iPhone X/XS**.
- The **Linea Pro** for **iPhone 15** is coming soon.
- The **Linea Pro** requires that you match the corresponding version to your **iPhone/iPod Touch** (e.g., **Linea Pro** for **iPhone 6s**, **Linea Pro** for **iPod Touch 6**, etc.)

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

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[*] The **Infinea Tab** is available for **IPad** users.

Scanning Items with a Scanner (cont.)

To add Items to an Inventory using a **Linea Pro** scanner:
1. Slide your **iPhone** or **iPod Touch** into your scanner.
2. On the Inventory screen, press the scan icon **a** in the bottom toolbar to activate the scanner.
3. Press **Done** **b** after you have scanned the barcode or wait for Barkeep to take you to the next screen.
4. After the barcode is scanned and a matching Item is found, BarkeepApp will automatically go to the Inventory Item screen.
5. The default quantity of 1 appears **c** (you can change the quantity).
6. If you are only scanning one barcode, press the **ADD** button **d** to add the Item to your Inventory. BarkeepApp will add the Item to your Inventory with the specified quantity at the chosen Location (e.g., Bar 1) and return you to the Inventory's Items list.
7. If you want to continue scanning full bottles or cases, simply scan the next barcode. Barkeep will automatically add a quantity of 1 for the previous Item. You can continue scanning and adding Items by repeating this step.
8. You can always scan a barcode and then enter a different quantity for the Item.
   For example, you would not need to scan all five bottles of the same Item. You could scan once and change the quantity to 5. On the next scan, the default quantity always returns to 1.
9. If you inadvertently re-scan the same Item, simply press the **CANCEL** button **e** and it will not be added to the Inventory.
8. What happens if Barkeep does not recognize a barcode?
   If the Item is not found, you will always see a pop-up menu with three choices:
   - **Search Barkeep**
   - **Create New Item Manually**
   - **Add Barcode to Existing Item**

   See next page for detailed instructions.

61
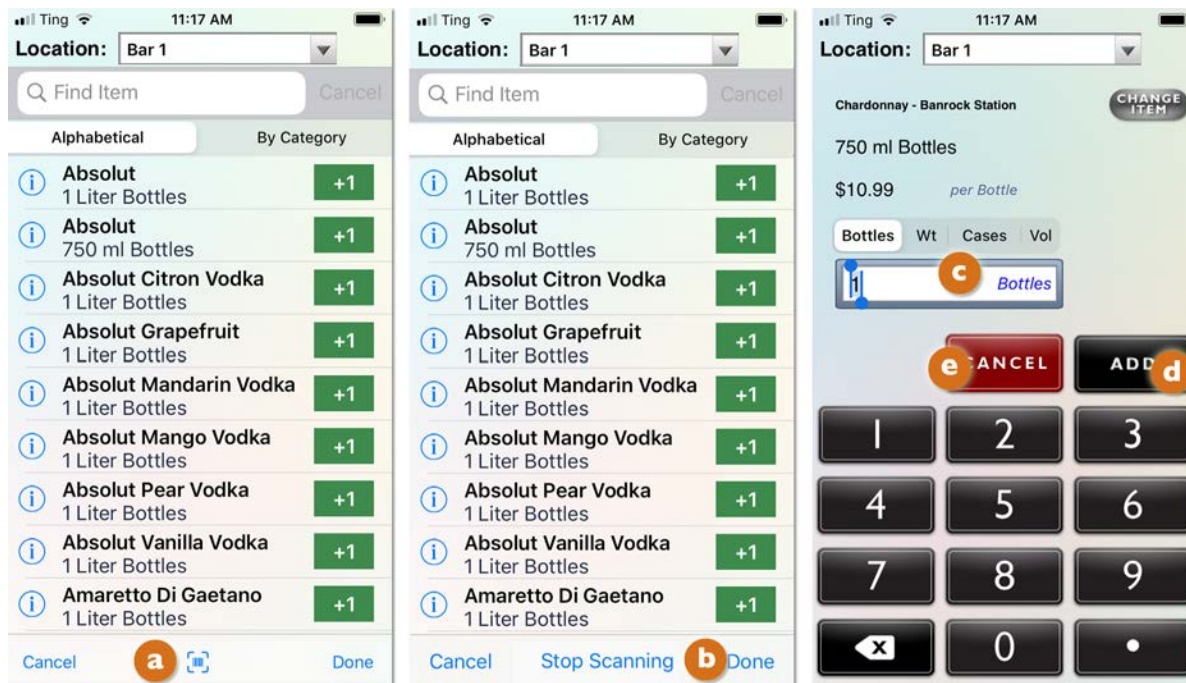
Adding Items to Inventories by Scanning (cont.)

What if I scan a barcode and the Item is not found?
Some barcodes you scan may <u>not</u> be assigned to an Item in your Items List. When you are scanning Items in an Inventory and Barkeep does not recognize the barcode, here are the steps to follow[*]:

1. If the Item is not found, you will see a pop-up menu **a** with three choices:
   - **Search Barkeep**
   - **Create New Item Manually**
   - **Add Barcode to Existing Item**
2. If you choose **Search Barkeep** and the Item is found, you will see an alert that the new Item has been added to your Items List.
3. If you choose **Search Barkeep** and the Item is <u>not</u> found, you will see a new pop-up screen where you can make the choice to create a new Item.
4. If you choose **Yes**, you will see a new Item Details screen **b** that only has the barcode, **c** but without other details.
5. Enter a Name and select a Category **d** and then add other details before you select **Save**. **e**
6. If you choose **Create New Item Manually**, you will also see a new Item Details screen **c** that has the barcode without other details. Again, add details to the Item before you select **Save**. **e**
7. If you choose **Add Barcode to Existing Item**, you will see an Items list where you can search or scroll for the correct Item. Select the Item to add the barcode to and select **Save** on the Barcode details to add the barcode to the Item.
   See the section on <u>**Adding Barcodes to Items**</u> for more details.
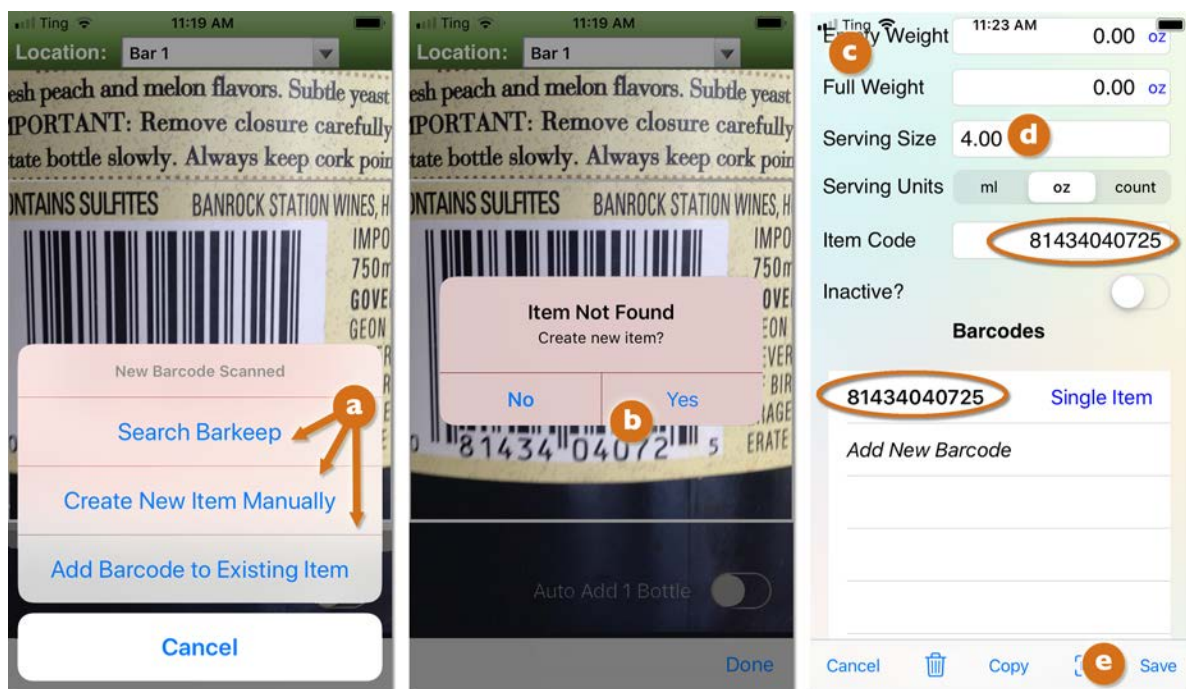
8. ***Important Final Step*** – If you **Create New Item Manually** or **Add Barcode to Existing Item** to an existing Item, this will <u>not</u> add the Item to your Inventory.
   You <u>must</u> rescan the Item to add it to your Inventory.

---

[*] The steps are the same for scanner and built-in camera.

Adding Items to Inventories by Scanning (cont.)
Scanning Partial Bottles[5]

With the **Linea Pro** scanner, as well as your **iOS** Devices built in camera, you can scan partial bottles. The important step is to always remember to change the quantity or Barkeep will add 1 full bottle by default.
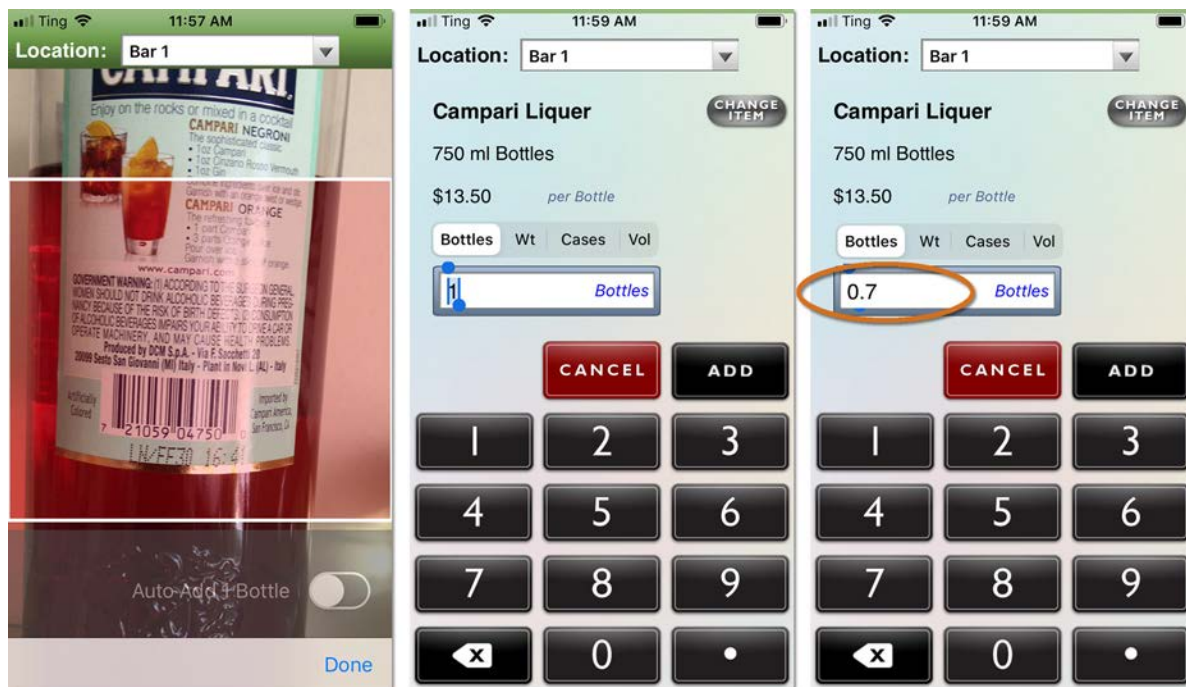
Scanning Cases

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

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

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

---

[5] The instructions on this page are the same for scanner and built-in camera.

Scanning Inactive Items

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

       Add
       Add and Make Active
       Cancel

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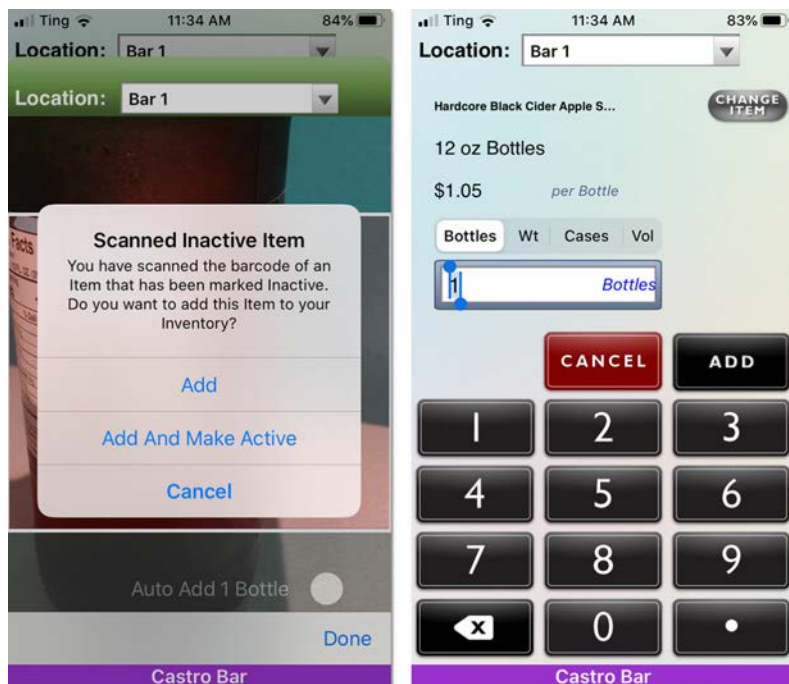
Scanning Tips

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

- ✓ **Lighting** - Using the camera to scan doesn't work well in low-light conditions. So, make sure that you have good, even lighting.

- ✓ **Avoid glare** - if your lighting is causing a glare on the bottle, it can wash out part of the barcode making it difficult / impossible to scan.

- ✓ **Keep the bottle still** - We personally have trouble holding both the bottle and camera still at the same time. It will be easier to place the bottle on a counter and hold the camera up to the bottle. This works better than trying to hold both at the same time.

- ✓ **Hold the bottle parallel** - The camera should be parallel to the bottle. If the camera is tilted at an angle, it skews the barcode and can make it difficult for BarkeepApp to recognize.

- ✓ **Center the barcode** - The scanning works best when the barcode is centered in the viewing area on the scan Items screen and is filling the viewing area by about 70%.

- ✓ **Slowly "zoom" in** - If holding the camera still isn't scanning the barcode, then start out with the barcode filling the viewing area at about 50% size. Then slowly move the camera towards the bottle so that the barcode increases to 70-80% will help.

- ✓ **What if the barcode will not scan?** Occasionally some barcodes just don't scan.   It may be because the barcode is extremely long and narrow and/or curves around the bottle too much - the barcode recognition package that is integrated into BarkeepApp might be unable to recognize it.

Pricing Items in Inventories

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

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

In Usage Reports, Barkeep determines the cost of an Item based on either:
- The amount you actually paid for the Item, or
- The default Item Price you set in Barkeep.

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

To override the price of an Item in a Return or Receiving Inventory, do the following steps:
1. After choosing an Item, you will be taken to the Inventory Item screen.
2. Press the (EDIT PRICE) button. **a**
3. Delete the existing price before entering a new price. **b**
4. The price change will only be for this Item in this <u>one</u> Inventory, unless you decide to select (MAKE DEFAULT). **c**
5. If you select to make the new price the default price, an alert will pop-up **d** that asks you to confirm your choice.
6. Press [ADD] to add the Item to your Inventory and save the new price or select [CANCEL] to discard the price change.
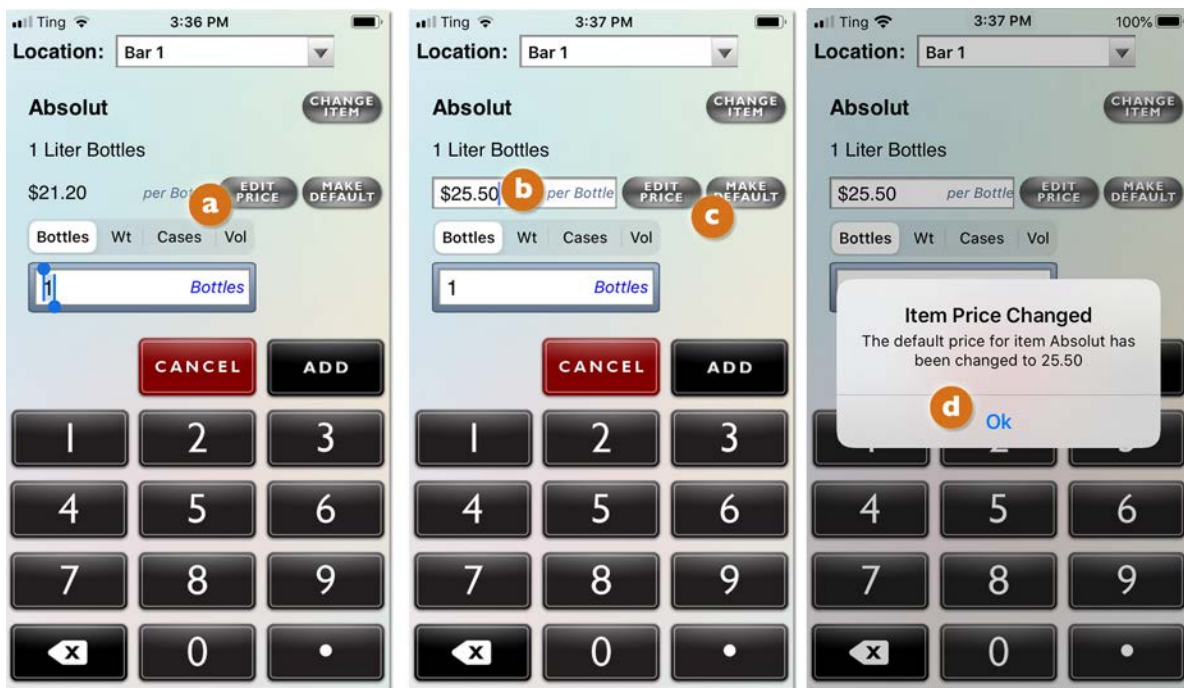
Weighing Bottles
Adding and Weighing Partial Bottles, Kegs and other Containers

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

- Estimating Quantity vs. Weighing Bottles

- Using the correct Weight Display Format

- Setting Full and Empty Bottle Weight

- How Barkeep calculates amounts based on Weight

- Weighing the Bottles

    o Manually Weighing the Bottles
    o Weighing the Bottles with a **Bluetooth** scale
    o Adding Multiple Entries for the same Item
    o Weighing Kegs
    o Weighing multiple Bottles of the same Item
    o Updating Full and Empty Bottle Weights
    o Weighing Bottles without Full and Empty Weights

- Setting up a **Bluetooth** Digital Scale

    o Systems Requirements for scales
    o Setting up your **Etekcity Luminary** scale
    o Tips for using **Etekcity Luminary** scale

Weighing Bottles (cont.)

Estimating vs. Weighing

There are two ways to count partial bottles[6]. The simplest is to enter partial bottles using decimal notation (e.g., .5). However, this method requires you to estimate how much liquor is in a bottle. This is generally okay when you're doing a Full Inventory and the margin of error is balanced out over a large quantity. But to be more accurate, you might consider weighing your bottles. If you are trying to narrow down on a specific problem area and want an extremely accurate count, you can weigh partial bottles and add the amounts by weight.

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

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

1. For the first, half full bottle of **Absolut**, you simply enter .5 and **a** press the **ADD** button to add the Item to your Inventory.
2. You place the second bottle on your approved **Bluetooth** digital scale. **b**
3. The scale detects the weight of 44.37 oz. Press the **ADD** button to add the Item to your Inventory.
4. Notice how the value of each Item is different. **c** If you had estimated the second bottle precisely you would have had to enter .533 and not. .5 Bottles.
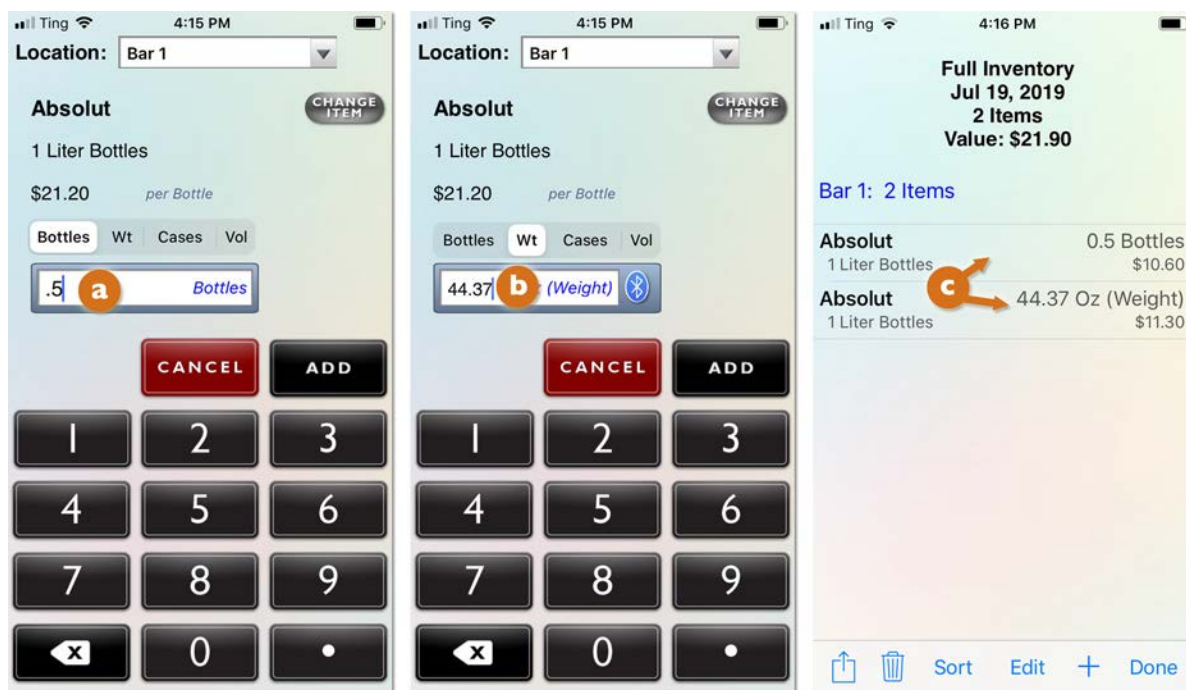
Note: You do not have to weigh every partial bottle, only those where you want a more precise quantity. The same Inventory can contain Items that are counted by the bottle, the partial bottle where you estimate the amount (e.g., .75) as well as Items where you weigh the bottles to get a very precise amount.

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

Weighing Bottles (cont.)

Using the correct Weight Display Format

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

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

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

1. Go to Settings **a** and verify that you have selected the correct weight format. **b** See **Weight and Measures Settings Section** for details.
2. When adding an Item to the Inventory, choose the center Wt button. **c**
3. Enter **d** the correct weight.
4. Pressing the fields will allow you to navigate as needed to enter pounds and ounces, etc.
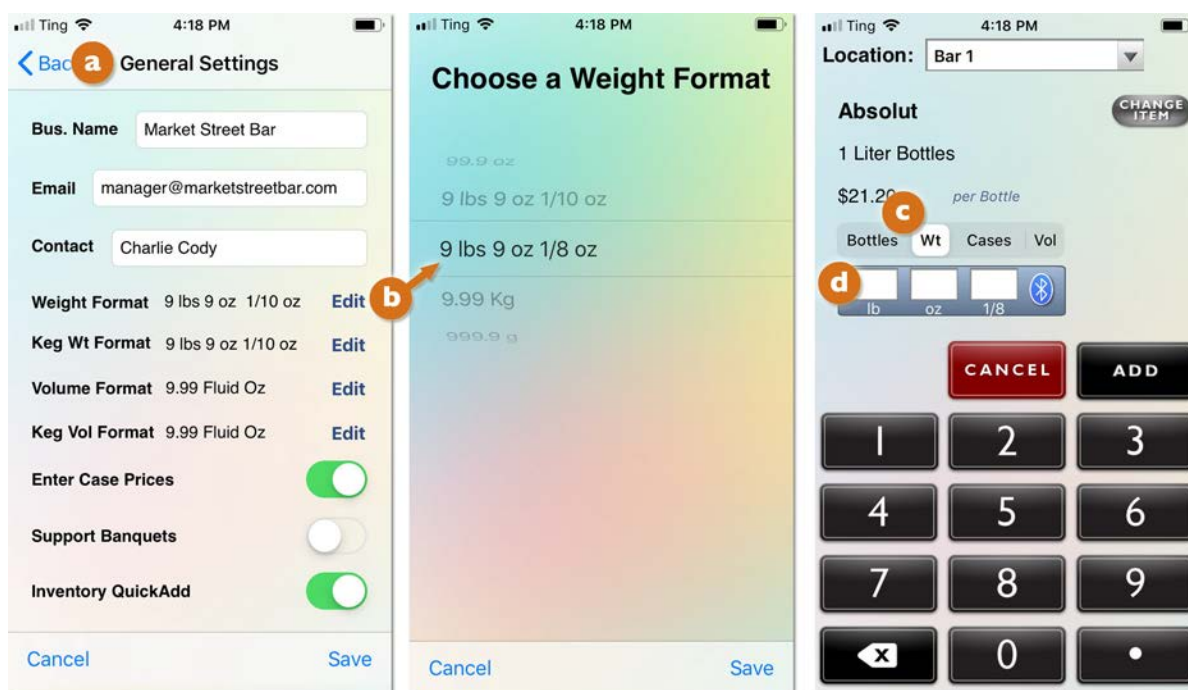
Adding and Weighing Partial Bottles (cont.)

> *Tip:* **Check the Bottle Size**
> When you select an Item to weigh, be sure to check the bottle size! If your Items List has different size bottle of the same product, be sure to choose the Item with the correct size. For example, you do not want to choose **Absolut 750ml** if you are weighing an **Absolut 1l** bottle.

Why does Barkeep need Full and Empty Bottle Weights?

If BarkeepApp doesn't know the weight of a full bottle and empty bottle for a particular Item, it can't determine how much of the contents are still in the bottle based on the weight of the partial bottle.

A calculation using Full Bottle Weight and Partial Bottle Weight allows BarkeepApp to be highly accurate in calculating partial bottles or other container types.

Note: When you attempt to enter an Item by weight and the Full and Empty bottle weights are missing, BarkeepApp searches[7] the Barkeep Database and automatically updates the Item if the weight information is in our Database.

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

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[7] *Reminder:* The Search Barkeep feature requires an Internet connection using either Wi-Fi or your phone's carrier network is required.

Adding and Weighing Partial Bottles (cont.)

Full and Empty Bottle Weight

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

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

1. Select the Item you wish to edit on your Items List.
2. This will take you to the Item Details screen where you can add the Full and Empty Bottle Weights for the Item.
3. Place a full bottle of your Item on your **Etekcity Luminary**[8] scale.
4. Press the 🔵 button with the **Bluetooth** icon (a) next to the "Full Wt" field.
5. The Full Bottle Weight (49.63 oz) (b) will be automatically added to your Item's details.
6. Place an empty bottle of your Item on the scale.
7. Repeat the steps by pressing the 🔵 button (c) next to the "Empty Wt" field.
8. The Empty Bottle Weight (22.68 oz) (d) will be automatically added to your Item's details.
9. Press to **Save** the changes or select **Cancel** to discard them. (e)
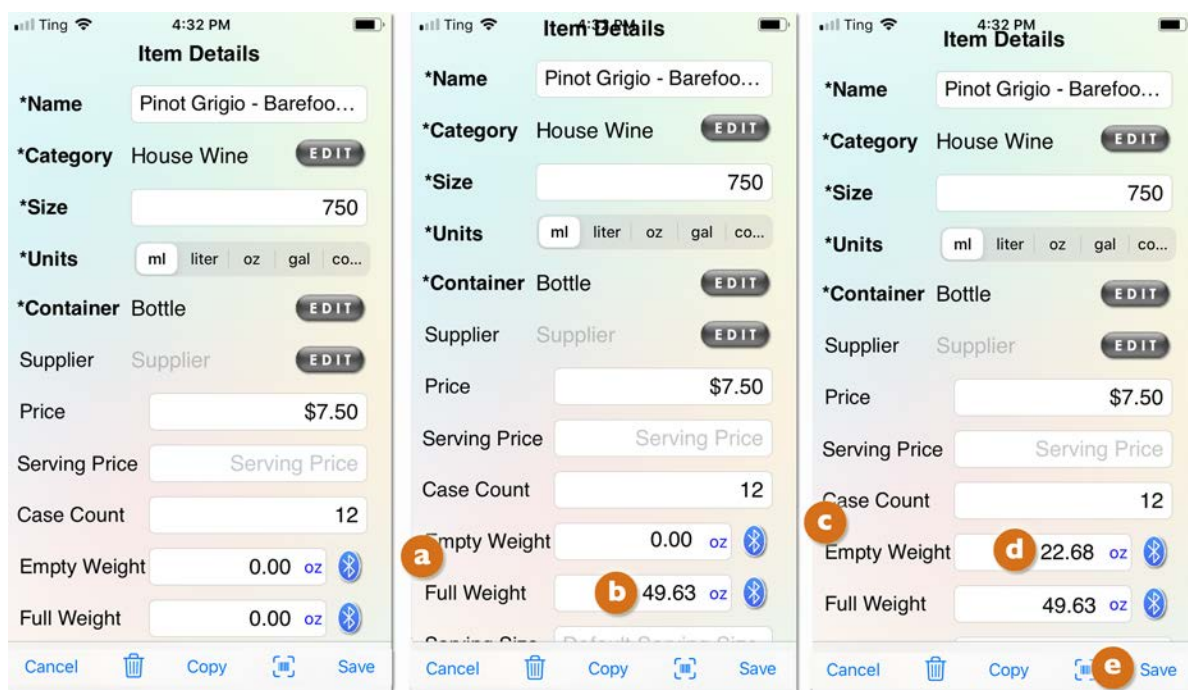
* **Reminder:** There are many other models of the **Etekcity** scales.
Only those purchased via barkeepapp.com are certified to work with BarkeepApp.
Other models will not work with BarkeepApp and are not supported by Barkeep.

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

70

Adding and Weighing Partial Bottles (cont.)
How does Barkeep calculate amounts based on Weight?
When you are conducting an Inventory, and weigh a partial bottle, this is the formula that Barkeep uses for calculating the volume of liquor in a partial bottle:

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

Below is an example showing an Item that has the Full Bottle Weight and Empty Bottle Weight added into the Item Details.
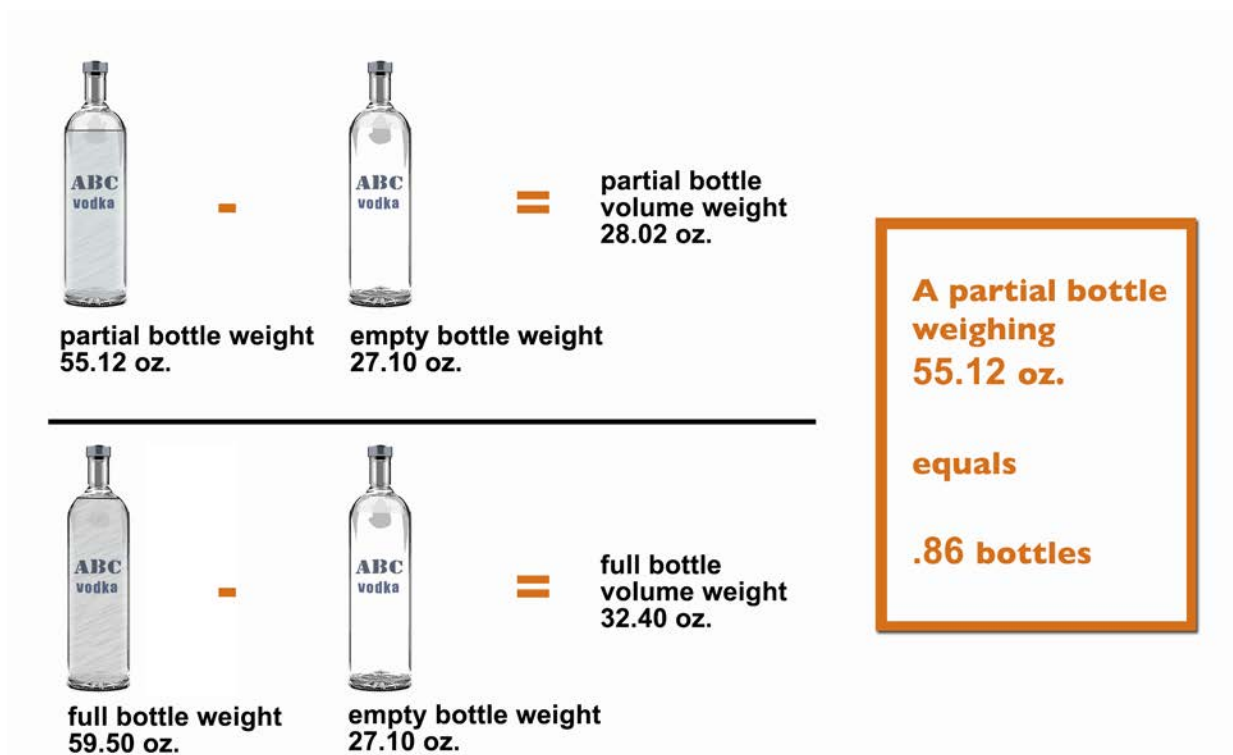
What happens if I do not enter either a Full Bottle Weight nor an Empty Bottle Weight?
Ideally each partial bottle you weigh will be for an Item where you have entered the Full and Empty Bottle weights. Many Items in the Barkeep database already have Full and Empty Bottle weights by default.

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

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

Adding and Weighing Partial Bottles (cont.)

Weighing the Bottles

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

Manually Weighing Bottles

To weigh a bottle (or other containers) and manually add the amount to an Inventory:
1. Select the Item. **a**
2. Switch the quantity format **b** from Bottles to Wt.
3. Be sure that your Weight Format set in Barkeep matches the format used by your scale.
4. Place your bottle on the scale. **c** Enter the weight of the partial bottle.
5. You can move between the weight fields (lb., oz, 1/8) by pressing the **NEXT** button. **d**
6. Press **ADD** to add **e** the Item to your Inventory or **CANCEL** to discard it.
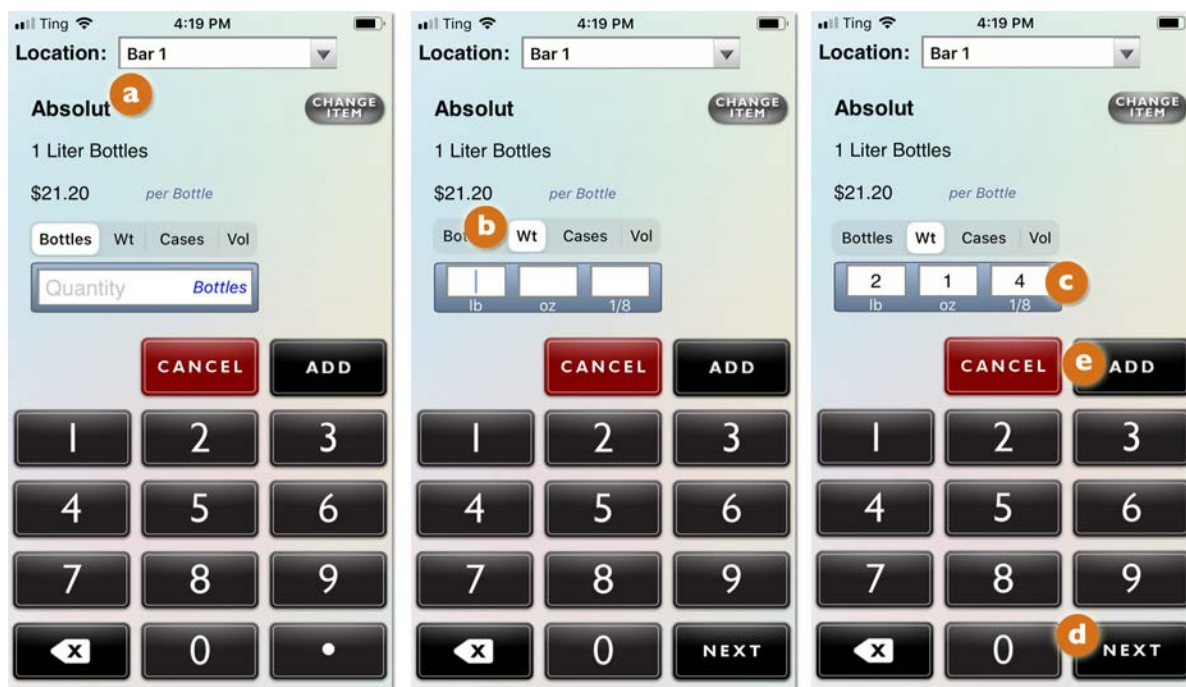
Adding and Weighing Partial Bottles (cont.)
with a Bluetooth Digital Scale

Are you connected to your Etekcity?

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

Troubleshooting: Etekcity Luminary Connection

> **Can you use more than one Etekcity Luminary at the same time?**
> Yes. When you have more than one staff member weighing and adding Items to the same Inventory, they each can be using their own **Etekcity** digital scale.[9] But, only one **iOS** Device can be connected to scale at a time.
> If you need help managing multiple scales, please contact support@barkeepapp.com

No Connection?

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

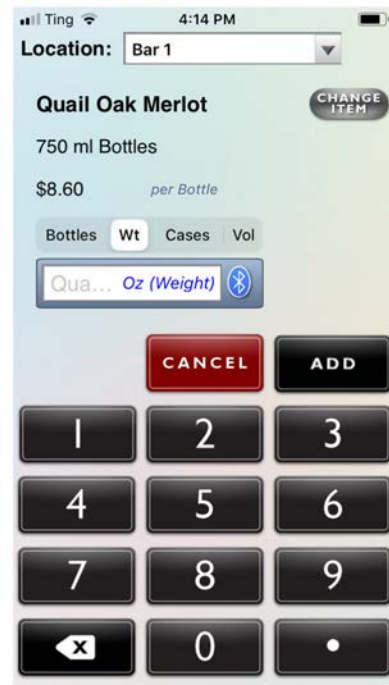✓ Make sure that your scale is on. The scale will turn off automatically after 3 minutes of inactivity.
✓ The scale's display will show **LO** to warn of a low battery.
✓ Make sure your **iOS** Device and scale are near each other.
For example, if you leave the area where you are conducting your Inventory,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

✓ The **Etekcity Luminary** is designed to only work with one **iOS** Device at a time.
Check that another **iOS** Device is not connected to your scale. For example, if you are taking Inventory with your iPad and using the **Etekcity Luminary**, your iPhone should not be connected to your scale at the same time.
✓ Occasionally another piece of your equipment such as printer or laptop with will have **Bluetooth** capacity and connect to the Etekcity. You might have to shut down the interfering piece of equipment or move your scale and **iOS** Device to another room.
✓ In rare instances, an older **iOS** Device might detect an **Etekcity Luminary**, but it will not be compatible with the scale unless it is one of the newer **iOS** Devices with **Bluetooth LE** capacity.
✓ Verify that the **iOS** Device and **Etekcity Luminary** you are using are compatible.
See **System Requirements**.
✓ If you have installed the **VeSync** app, remove it from your **iOS** Device.
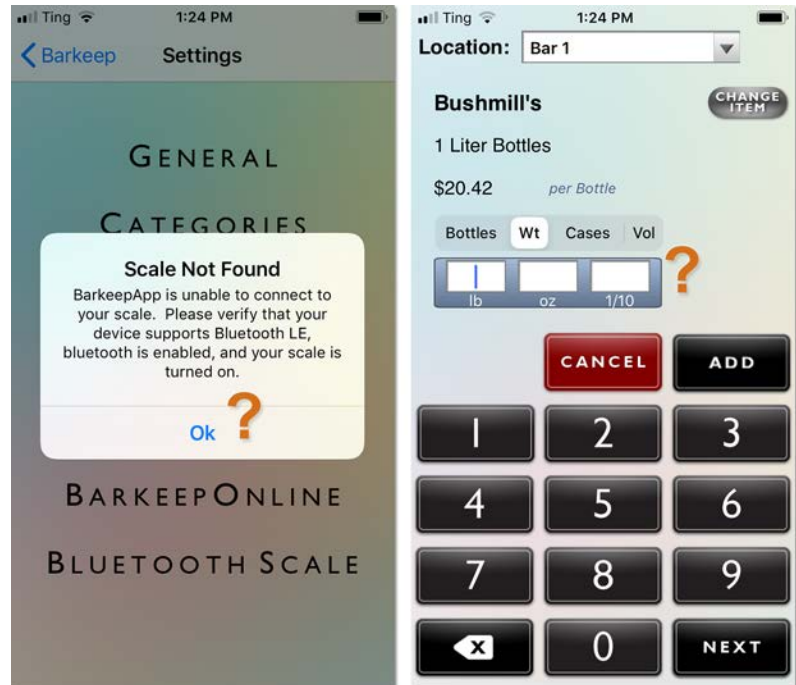
Still no Connection?

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

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

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[9] A BarkeepOnline subscription is required for multiple staff members to work together in Barkeep.

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

To weigh a bottle with a **Bluetooth** digital scale[10] and automatically add the amount to an Inventory:

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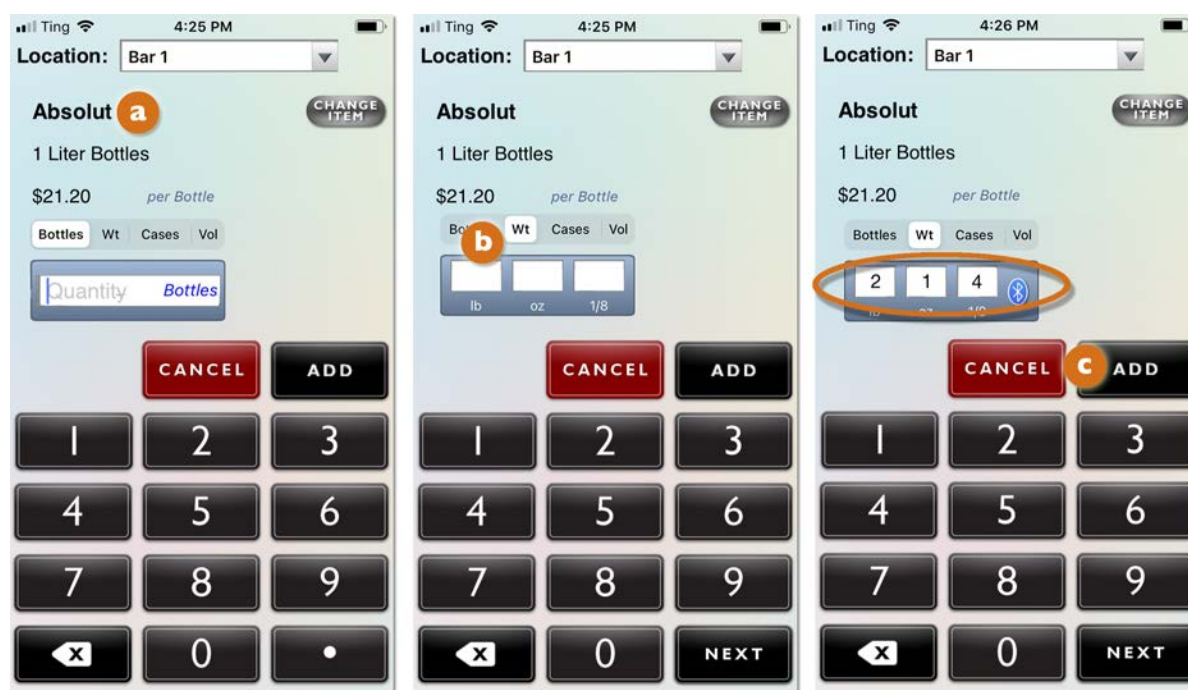
The **next page** has instructions for adding multiple entries for the same Item.

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[10] There are many other models of the **Bluetooth** digital scales available. Only those purchased from barkeepapp.com are certified to work with BarkeepApp. Other models will not work with BarkeepApp and are not supported by Barkeep. We are not able to provide assistance with or answer questions about scales purchased elsewhere.

Adding Multiple Entries for the same Item

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

For example, if you have three full bottles of **Absolut** and one partial bottle, you will need to:
1. Add the (a) 3 Bottles and press ADD .
2. And then add the individual partial bottle by re-selecting **Absolut**.
3. Press the "Wt" button (b) on the Unit Selection control.
4. Place the partial bottle on the scale.
   a. Weigh the bottle on a digital scale and manually enter the number of ounces (c) (For example, 55.12 oz) and press the ADD button.
   b. Or have the **Bluetooth** (*) digital scale automatically detect the weight from the scale.
5. Note that the Inventory now includes two Item entries for **Absolut**. (d) The three full bottles and the individual bottle weighing 55.12 ounces.
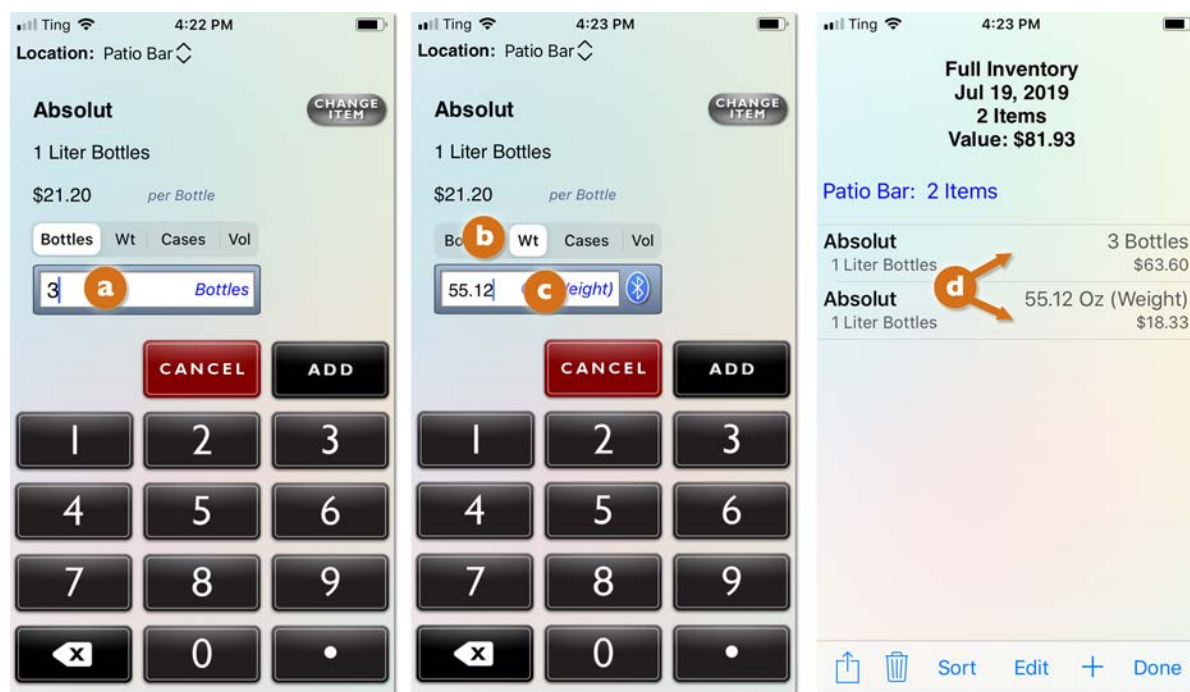
Reminder: If you have a digital scale that displays weights in pounds and ounces or are using metric measurement, you can change your preferences in General Settings.
See the **Weights and Measurements Section** for additional information.

Weighing Kegs

The instructions in this section specifically mention weighing partial bottles of liquor, but the same instructions can be used for any container type. For example, it is difficult to estimate the amount of draft beer in an open keg. Many bars use a freight scale to weigh their kegs. If you choose to do so, you can use the same instructions as you would for weighing partial bottles.
Note: The maximum weight that can be placed on the **Etekcity Luminary** digital scale is 10kg or 22 lbs.
For larger Items (i.e., Kegs) you will need to use a higher capacity scale and enter the weight manually such as the **Accuteck** keg scale available at barkeepapp.com.

See the **Support Section** at barkeepapp.com for additional information on **Managing Kegs**.

Adding and Weighing Partial Bottles (cont.)

Weighing *and* Scanning Bottles

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

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

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

77
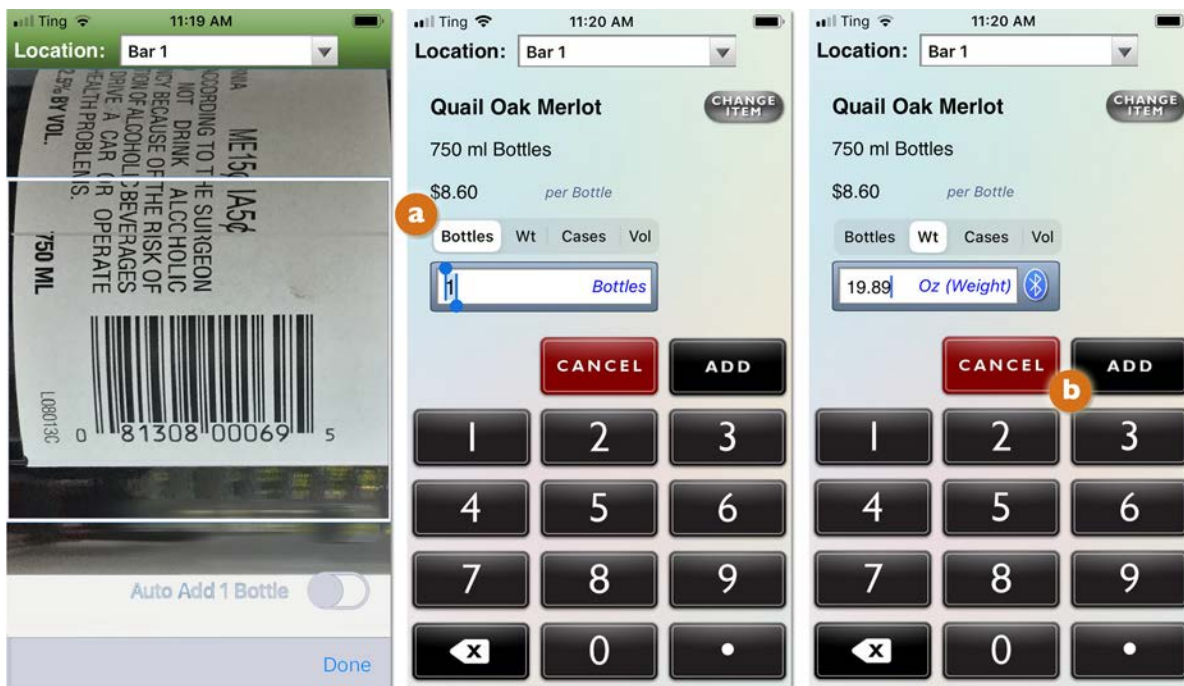
Adding and Weighing Partial Bottles (cont.)
Weighing Multiple Bottles
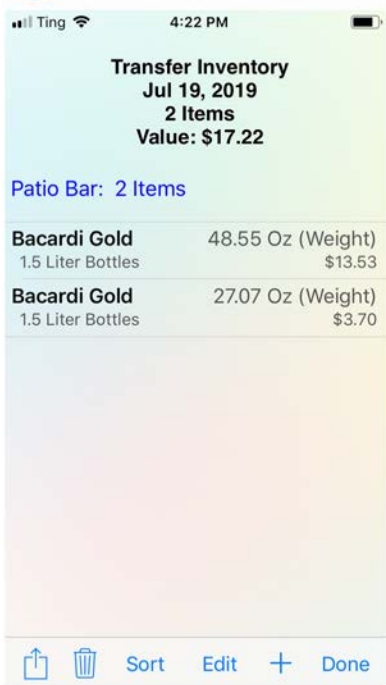
> ***Important:*** Always weigh just <u>one</u> bottle at a time!
> Never add together multiple partial bottles as a single weight entry.

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

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

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

a correct

Ting	4:22 PM
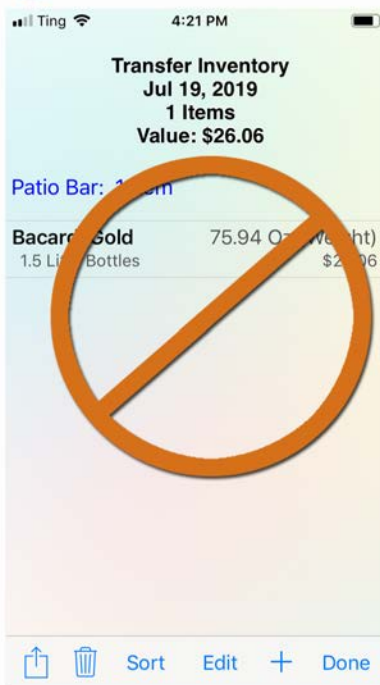
Transfer Inventory
Jul 19, 2019
2 Items
Value: $17.22

Patio Bar: 2 Items

Bacardi Gold	48.55 Oz (Weight)
1.5 Liter Bottles	$13.53
Bacardi Gold	27.07 Oz (Weight)
1.5 Liter Bottles	$3.70

Sort   Edit   +   Done

b incorrect

Ting	4:21 PM

Transfer Inventory
Jul 19, 2019
1 Items
Value: $26.06

Patio Bar: 1 Item

| Bacardi Gold | 75.94 Oz (Weight) |
| 1.5 Liter Bottles | $26.06 |

Sort   Edit   +   Done

- Also note that the total value of both Items is shown as $17.22 in the correct version **a** above. When the bottles are weighed incorrectly and **b** both bottles are placed on the scale together, the volume amount (quantity) will be incorrect. The value shown in the incorrect version is $26.06 Incorrect amounts in your Inventories cause your Reports to be inaccurate.

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

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

Weighing Items and Updating Bottle Weights

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

1. You can weigh the bottle and enter the weight manually **a** or have the **Bluetooth** digital scale automatically **b** detect the weight from the scale.
2. When your press the SAVE button or the ADD button, you will get a warning if the Item is missing Full and Empty Weights.
3. In this example, BarkeepApp has automatically searched the Barkeep Database and updated the Item with the missing Full and Empty Bottle Weights.
     See the next page for what happens if Barkeep does not update the missing weights.
4. Press "**Ok**" to finish adding the Item to your Inventory. **c**
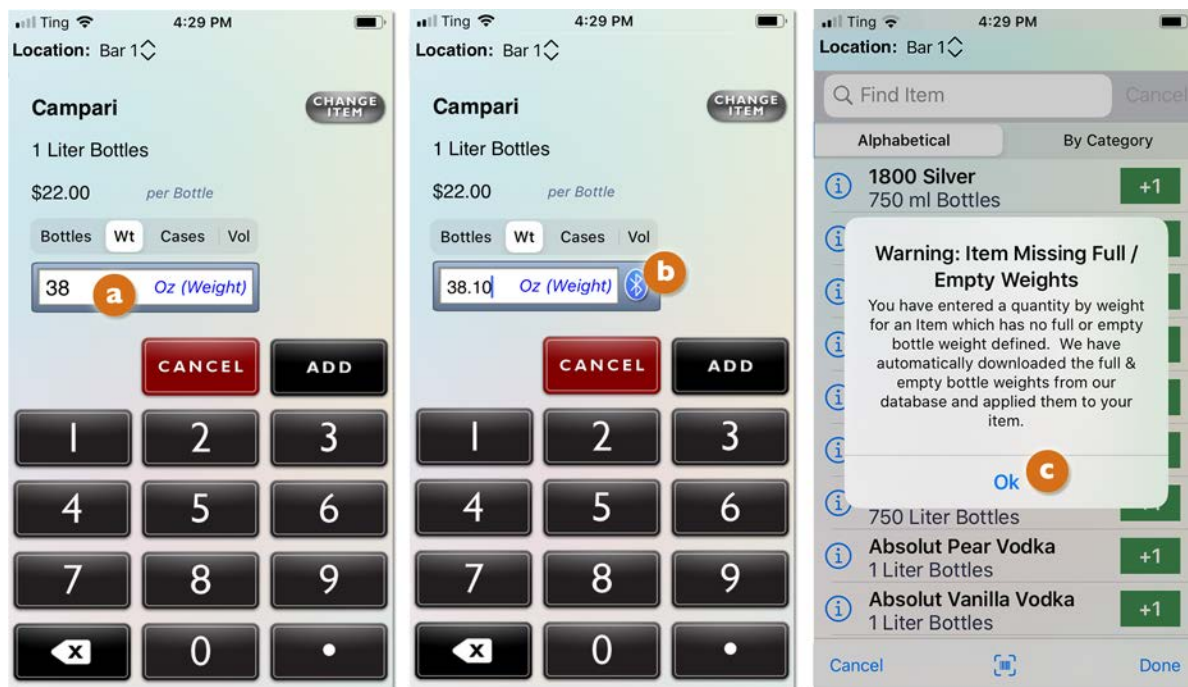
What happens when Bottle Weights are missing? (cont.)

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

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

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

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

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

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

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

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

1. First you weigh the bottle and enter the weight manually **a** or have the **Bluetooth** digital scale automatically **b** detect the weight from the scale.

2. When your press the [SAVE] button or the [ADD] button, Barkeep will attempt to update the missing Full and Empty weights.

3. If no weight information was found, you will get a warning the Item is missing Full and Empty Weights.

4. When you press Ok, **b** the partial bottle will be added to the Inventory, but the calculated amount will not be as accurate as when the Item Details included the Empty Bottle Weight and Full Bottle Weight.
   This is generally okay when you're doing a Full Inventory and the margin of error is balanced out over a large quantity. But to be more accurate and focus on a specific problem area, you should add the Empty Bottle Weight and Full Bottle Weight to any Items you plan to weigh.

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

6. If you have neither a Full nor Empty Bottle weight, you might have more accurate results if you enter the item without weighing it and estimate the quantity instead (i.e., .4, .5, .75, etc.).
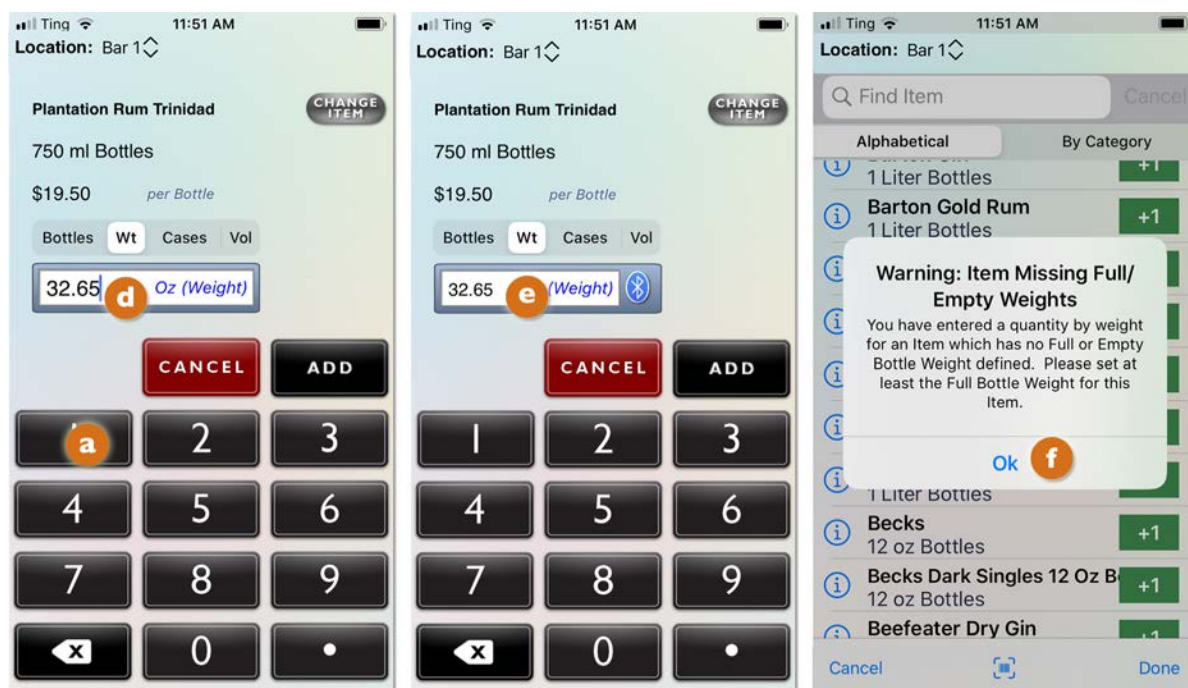
Reminder: When you attempt to enter an Item by weight and the Full and Empty bottle weights are missing, BarkeepApp searches the Barkeep Database and automatically updates the Item if the weight information is in our Database.

Setting up an Etekcity Digital Scale

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

Important: If you would like to have BarkeepApp automatically detect the weight of partial bottles using Bluetooth, you <u>must</u> purchase a certified Bluetooth digital scale via barkeepapp.com.   The **Etekcity Luminary** is the **Bluetooth** scale that will exclusively work with the latest version of BarkeepApp[11].

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

Systems Requirements for the Etekcity Scale

Your **iOS** Device must have Bluetooth capability.

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

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

Charging the Etekcity Batteries

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

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

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

Setting up an Etekcity Luminary (cont.)

The first step is to turn on your scale by pressing ⏻ZERO.
- Note that the scale will turn off automatically after 3 minutes of inactivity.
- To manually turn off the scale, tap and hold ⏻ZERO for 2 seconds.
- If the scale does not turn on, the battery might need charging.

Connecting the Etekcity Luminary with BarkeepApp

1. Select iOS Settings ⚙ and verify that your iOS Device's Bluetooth support **a** is turned on.
2. Launch BarkeepApp on your iOS Device and go to your inventory. **b**
3. Turn on you **Etekcity Luminary**, when the scale is turned on and is in proximity to your iOS Device, your scale should automatically connect to BarkeepApp.
4. You are ready to start weighing bottles. **c**
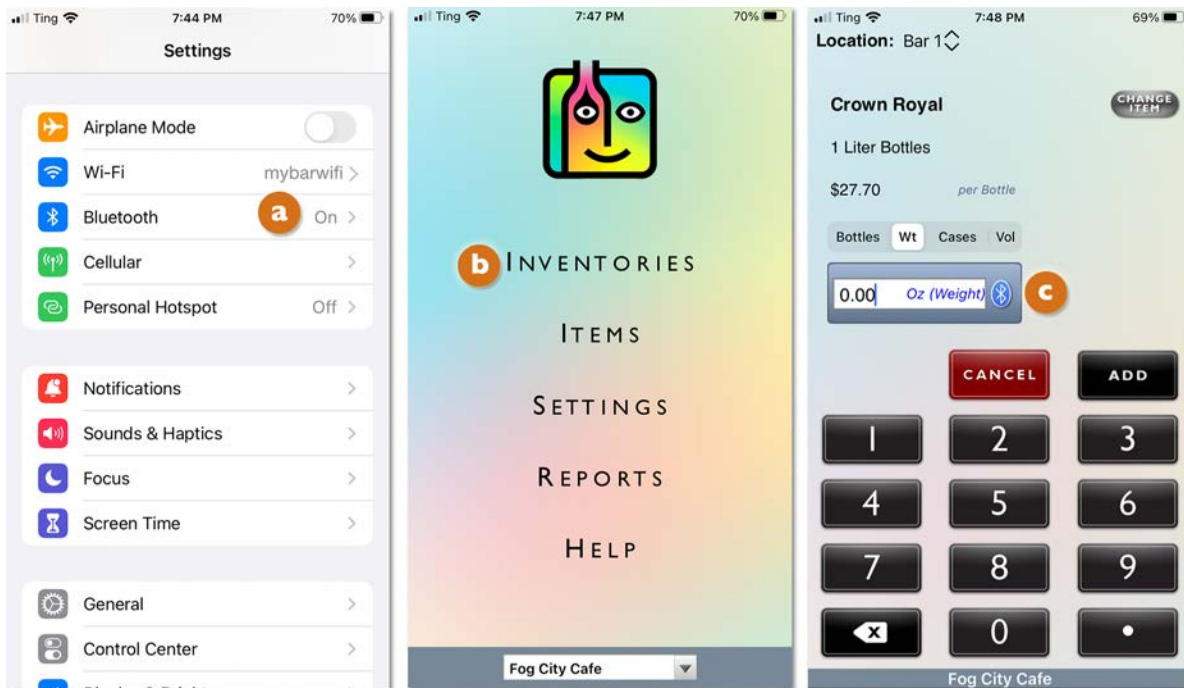
> **Can you use more than one Etekcity Luminary at the same time?**
> Yes. When you have more than one staff member weighing and adding Items to the same Inventory, they each can be using their own **Etekcity** digital scale.[12] But, only one **iOS** Device can be connected to scale at a time.
> If you need help managing multiple scales, please contact support@barkeepapp.com

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[12] A BarkeepOnline subscription is required for multiple staff members to work together in Barkeep.

Tips for Using your Etekcity Scale

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

Capacity
22 lbs. (10 kg.)

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

Automatic Shut-Off
The scale will turn off after 3 minutes of inactivity to save battery.

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

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

Etekcity Luminary Manual
For additional information, there is a manual from the manufacturer – **click this link**.

Adding by Volume

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

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

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

1. First select the Item that you want to add to the Inventory. **a**
2. On the Inventory Item screen press the "Vol" button. **b**
3. Then enter your quantity **c** (e.g., 32 fluid oz. for a spilled pitcher).
4. Press the **ADD** button **d** to add the Item to your Inventory.
5. Your Inventory will display the amount in Fluid Ounces.[13]
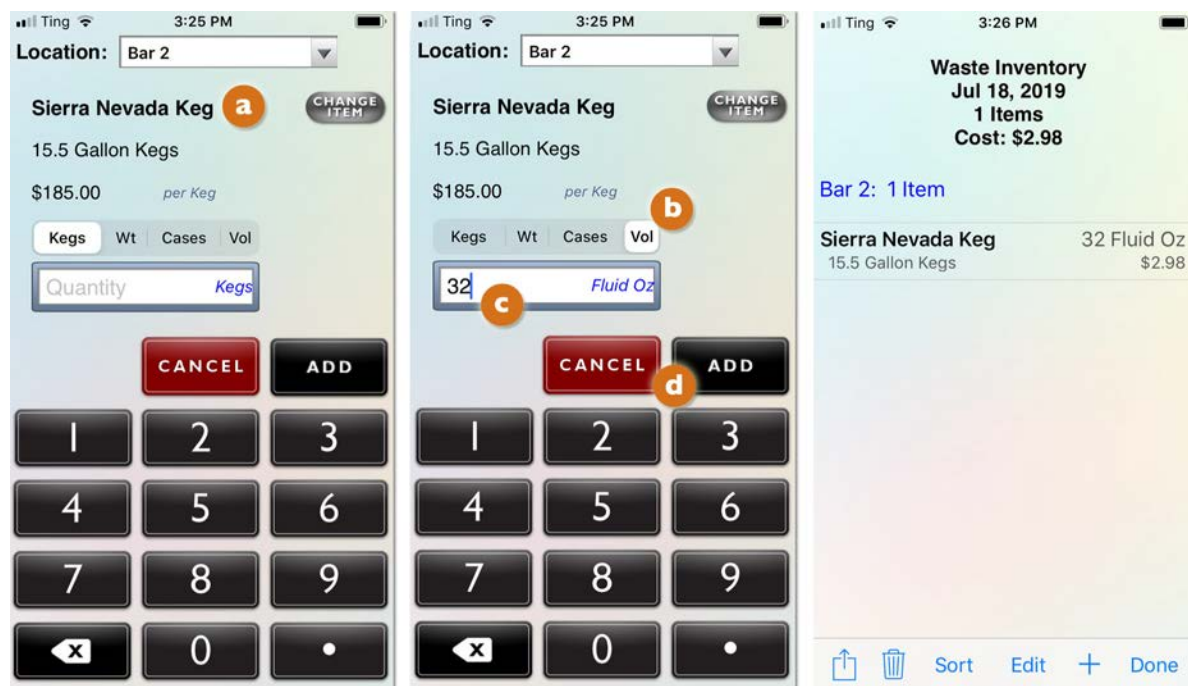
Note: Users can set a Volume Format – see **General Settings**.

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[13] Metric Users can enter volume in liters or milliliters

Adding Cases

To add cases to an Inventory:

1. First select the Item that you want to add to the Inventory.
2. On the Inventory Item screen press the "Cases" button. **a**
   Note: When selecting "Cases" Barkeep shows the price per case.
   In the example below a bottle of **Absolut** costs $23.83, there are 12 bottles in a case and the price shown is $285.96 ($23.83 x 12). The Item name also includes the bottle size (e.g., **Absolut 1l**) when displaying cases.
3. When "Cases" is selected, the Item size will change to display "Case of N" where N is the number of Bottles/Cans in a Case (**12**). In the example shown, the name of the Item will change to include the size of the bottles/cans in the case. For example, "Case of 12"
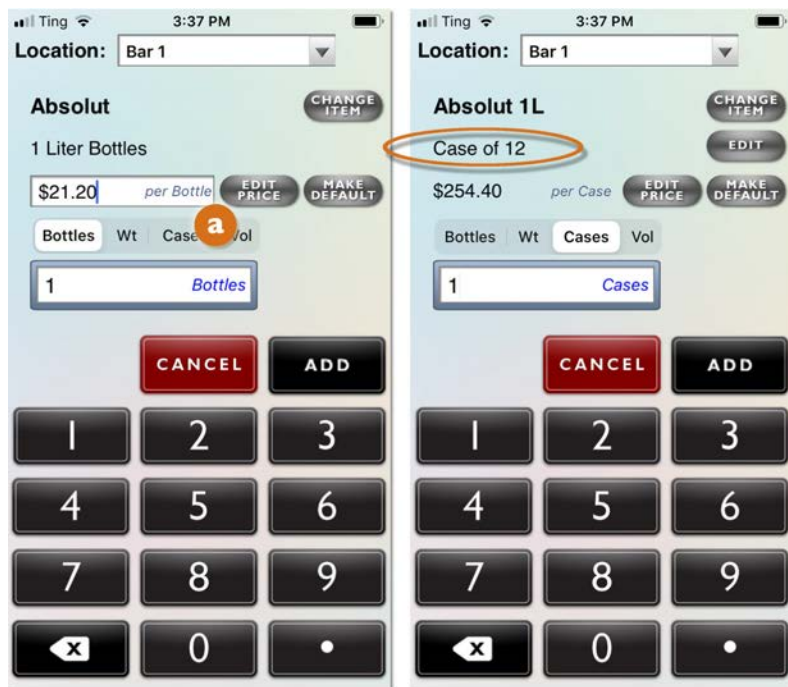
The number of bottles/cans in a case will automatically default to the Default Case Size that is specified on the Item Definition. The default case size for **Absolut 1l** bottles is set to 12, so when you choose Cases of **Absolut** it automatically sets the case size to 12. You can modify this by pressing the ⬤ EDIT button to the right of "Case of 12." This will allow you to edit the field with a new number of bottles per case.

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

More than one barcode

What if a case has a different UPC barcode than a bottle?
You may assign different barcodes for the same Item. For example, many manufacturers have a barcode for a single bottle as well as different barcodes for a case of 6 bottles and 12 bottles, etc.
See the **Receiving Inventories** section for specific instructions.
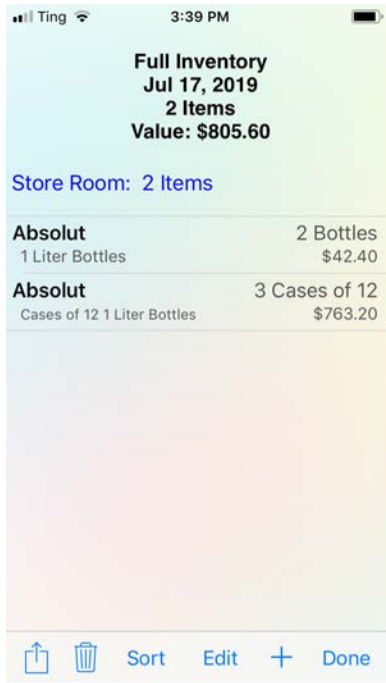
Adding Cases *and* Bottles together
in the same Inventory

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

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

Changing Inventory Locations

If you are adding Items to multiple Locations within a single Inventory, you can easily switch between Locations in the middle of an Inventory.
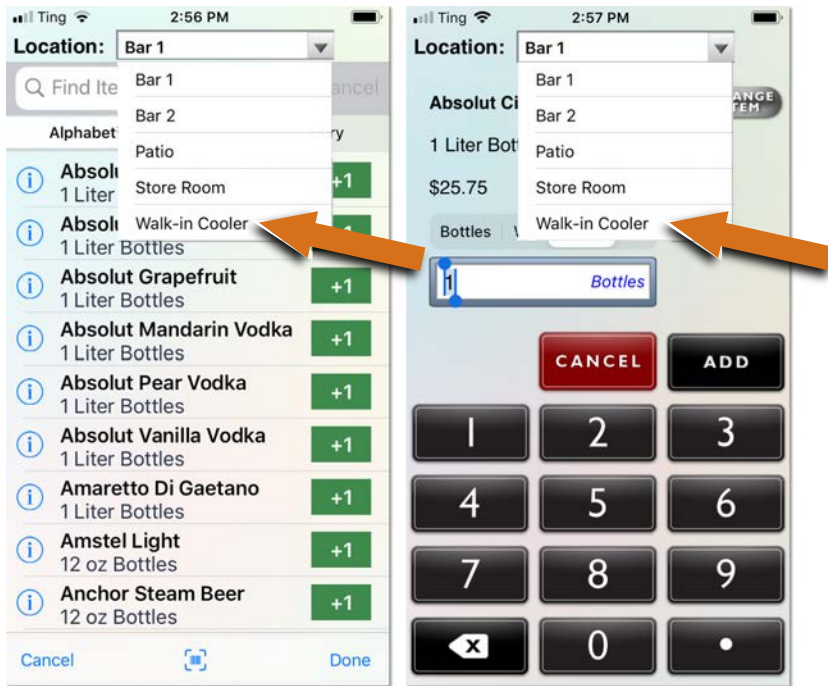
To change an Item's Location, you have two options:

>   **Option 1**
>   The top of the Inventory's Item List screen has a drop down menu where you can assign or change a Location for the Item you are adding to the Inventory.
>   **Option 2**
>   To change the Location, first select an Item that you want to add to the Inventory. The top of the Item screen has a drop down menu where you can assign or change a Location for the Item you are adding to the Inventory.

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

Inventory by Location

When is a Full Inventory not a Full Inventory?

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

A Limited Full Inventory

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

The example below shows a Usage Report where only the Location **Bar 1** is selected.
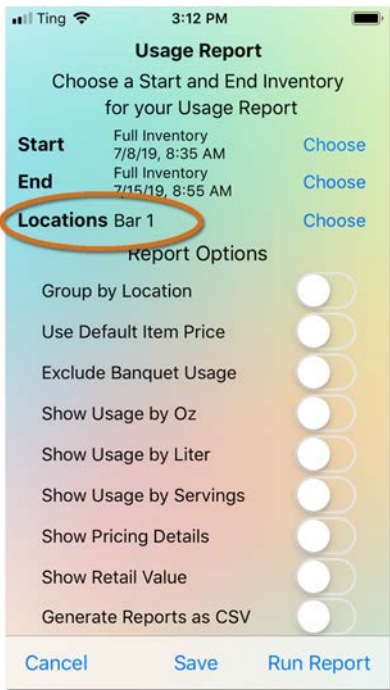
In this example, in order to run accurate Reports based on Limited Full Inventories, users must do Transfer Inventories when they move Items to the bar stations (i.e., stock the bar).
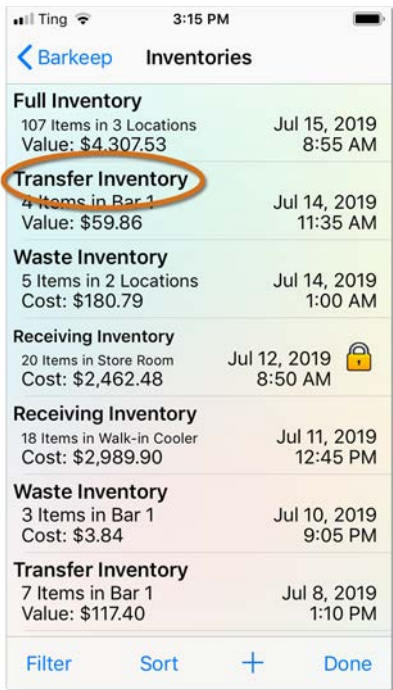
Note: If you choose to do Full Inventories and only count certain Locations, Transfer Inventories are crucial.
See **Transfer Inventories** section for details.
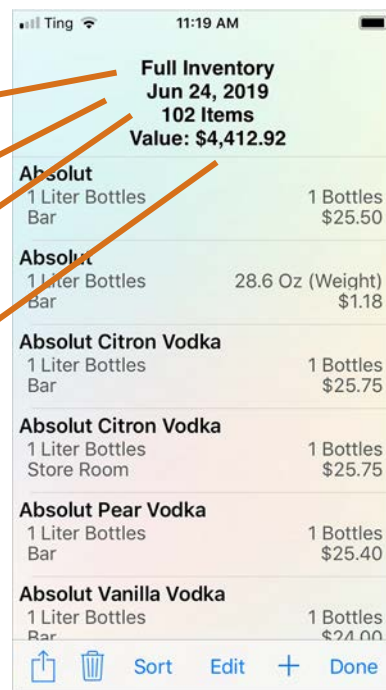
Managing your Inventories

The Inventory Screen

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

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

- The Inventory Type

- The date that the Inventory was created

- The total number of Items in the Inventory

- The total value of the Items in the Inventory

By default, the Inventory screen is sorted by Location. The Items[14] within the Inventory are grouped by Location, and Items within a Location are sorted alphabetically. The Location Name and number of Items in that Location are displayed in the header for each section. Each Item within the Location is listed displaying the Item Name, Item Size (**1l**, 12 oz., etc.), and the Quantity of that Item. If an Item is added to the Location more than once, there will be multiple rows displayed showing each time that the Item was added to the Inventory.

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[14] The total number of Items indicates the total number of entries for the Inventories. For example, if **Budweiser** is entered in more than on Location, each entry will count towards the Item count.

Inventory Sort Order

To sort any Inventory:
1. You can choose to sort the Items list by pressing **Sort** (a) at the bottom of the toolbar.
2. An action menu appears with five options to sort you're the Items in your Inventory by:

   - Inventory Order – **First to Last**
   - Inventory Order – **Last to First**
   - **Item**
   - **Location, Item**
   - **Location, First to Last**

3. You may re-sort the Items so that they are displayed in exactly the same order in which they were added to the Inventory (**First to Last**). (b) This is particularly useful if you are reviewing your Inventory for accuracy and want to go back through the Items in the same order that they were added.
4. If you choose to sort the list by Inventory Order or Item, the individual Items are no longer grouped by Location – so the name of the Location that the Item was added to is included in each row. (c)

The example below shows an Inventory sorted by **First to Last**. (d)
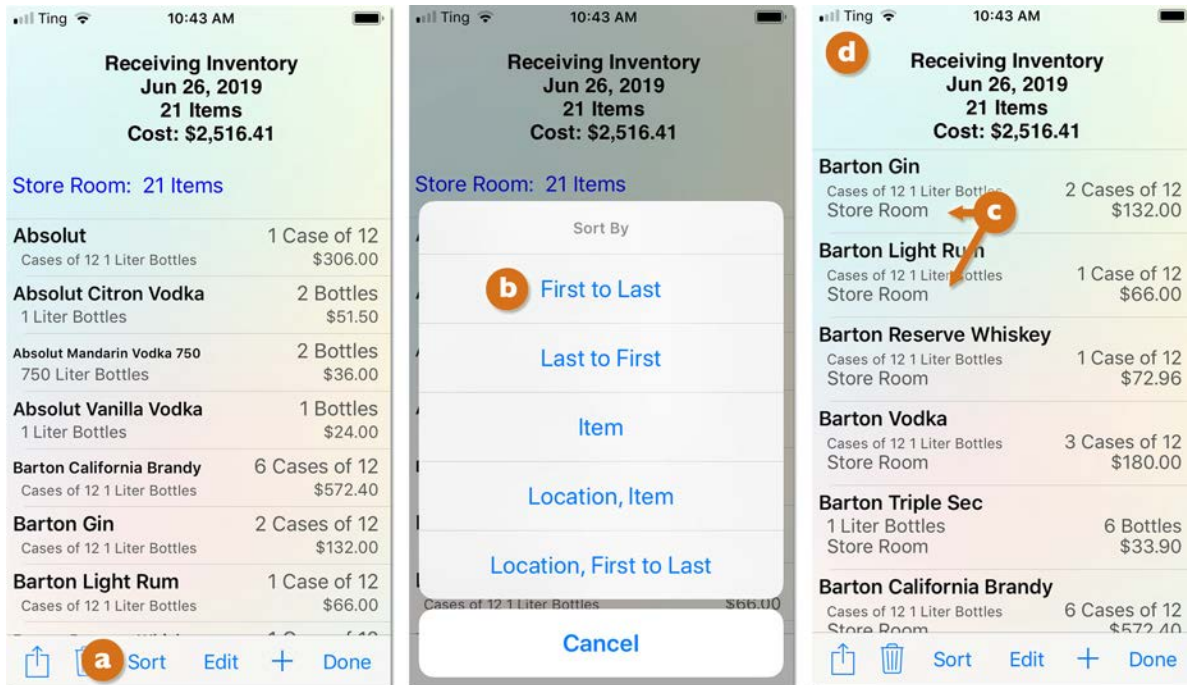
Inventories List

When you select Inventories on the Main Screen **a** the next screen you will see is the Inventories screen.

This is where you press the ⊞ icon to start **b** a new Inventory but it also is the screen you go to review your existing Inventories if you need to edit Inventory details, make changes by adding and deleting Items in the Inventory and also to delete existing Inventories.

Filter and Sort

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

Filtering

When you select to **Filter** Inventories, **c** you can choose to: **e**
- **Show Old Inventories** and see Inventories that remain on your **iOS** Device but are more than 30 days old.
- **Show Banquet Inventories** (if you have created Banquet Inventories). By default, Banquet Inventories will be hidden from your list of Inventories.
- Select **Cancel** and keep the contents of the list on your Inventories screen as is.
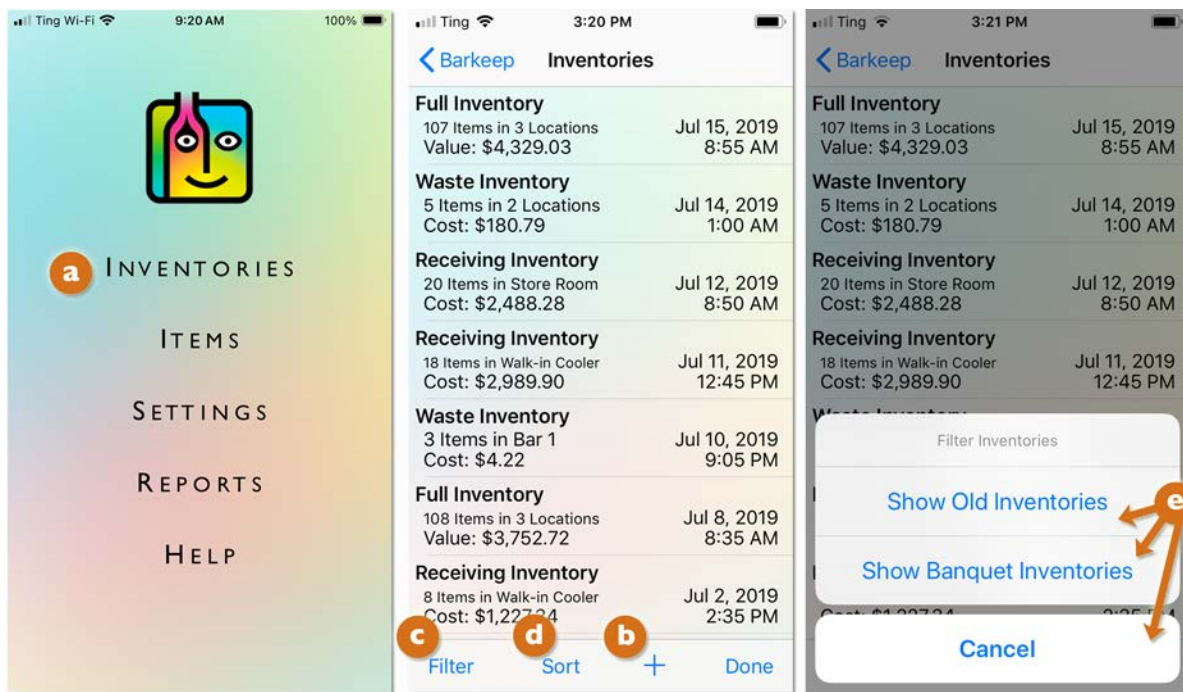
To undo any filtering choices, you need to reselect **Filter** and then you will see options **Hide Old Inventories** and **Hide Banquet Inventories** if you have selected to show them.
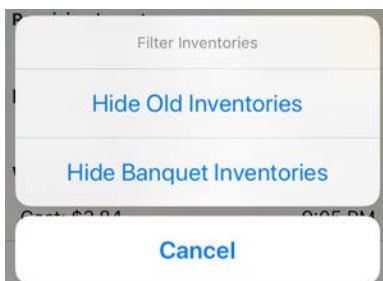
Inventories List (cont.)
Sorting

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

Note: If you have made selections to filter your Inventories (**see previous page**), Barkeep will sort the filtered list.

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

- Sort **First to Last**.
- Sort **Last to First**.
- Select **Cancel** and keep the contents of the list on your Inventories screen as is.
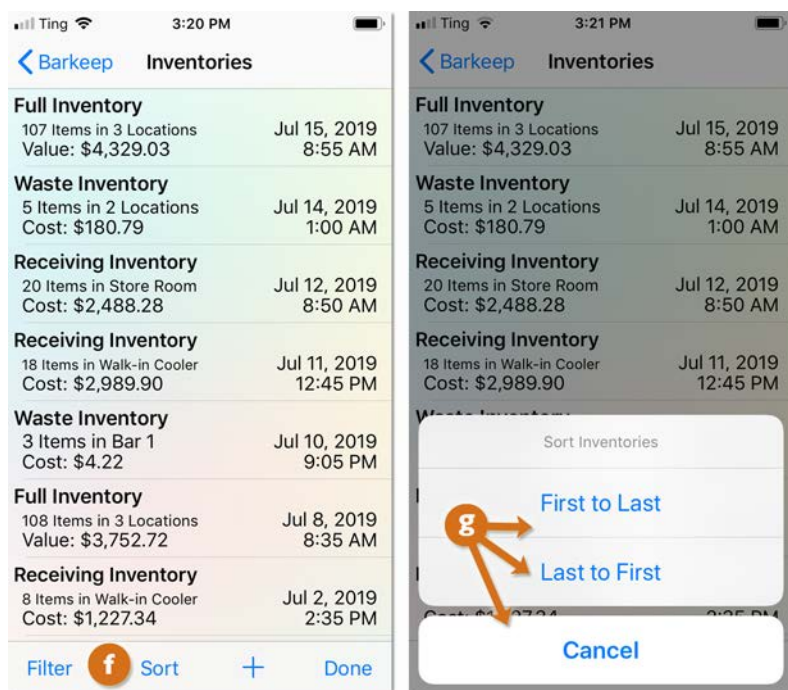
To undo any sorting choices, you need to reselect **Sort** and then re-sort your list.

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

Editing an Inventory

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

1. Go to the Inventory screen for the Inventory **a** that you'd like to modify.
2. Press **Edit** on the **b** bottom toolbar.
3. After making your changes in the Edit Inventory screen, **c** press to **Save** your changes or select **Cancel** to discard them.
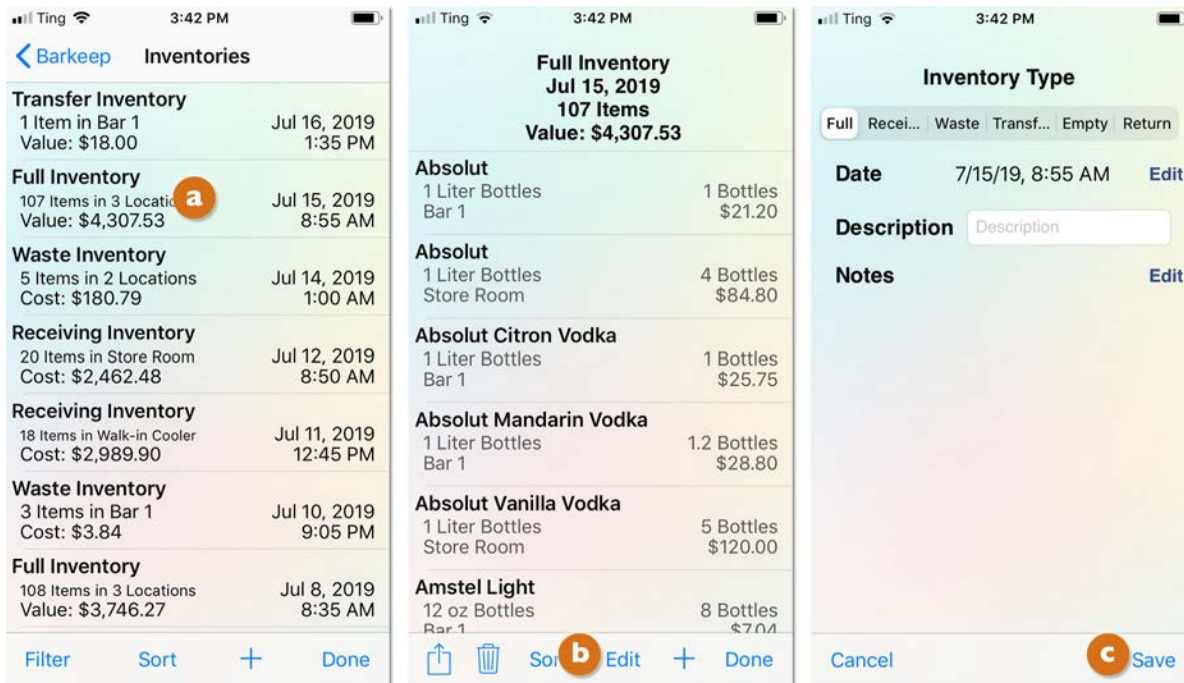
Inventory Properties
The properties that you can set on an Inventory are:
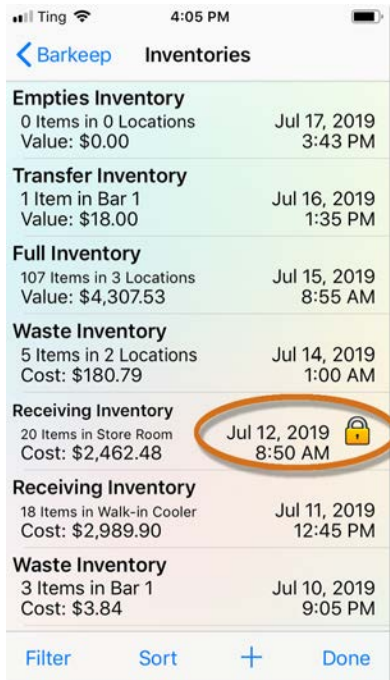
Property	Applies To	Description
Date	All - Required	The time that the Inventory was created.
Description	All (optional)	A brief description of the Inventory. For example: "Premium Inventory"
Notes	All (optional)	Notes about the Inventory. For example: "Received a broken bottle of **Absolut**. Expect a credit from Southern."
Invoice No.	Receiving (optional) Return (optional)	The invoice number for a receiving invoice.
Invoice Amount	Receiving (optional) Return (optional)	The total cost of the invoice associated with a Receiving Inventory. This can be used to compare the cost on the invoice to the actual value of the Inventory by running a Summary Report on the Inventory.
Supplier	Receiving (optional) Return (optional)	The Supplier, vendor or company that provides you with Items.
From Location	Transfer - Required	The Location that Items are being transferred out of.

Locked Inventories

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

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

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

Editing Inventory Items

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

1. Select the Item ⓐ you would like to modify from the Inventory screen.
2. This will take you to the Inventory Item screen.
3. In the Inventory Item screen, you can:
   - select a different Item
   - change the Quantity
   - change the Units (Bottles versus Wt versus Cases)
   - change the Location of the Item
4. After making your changes, ⓑ you can press [SAVE] to save your changes or select [CANCEL] to discard them.
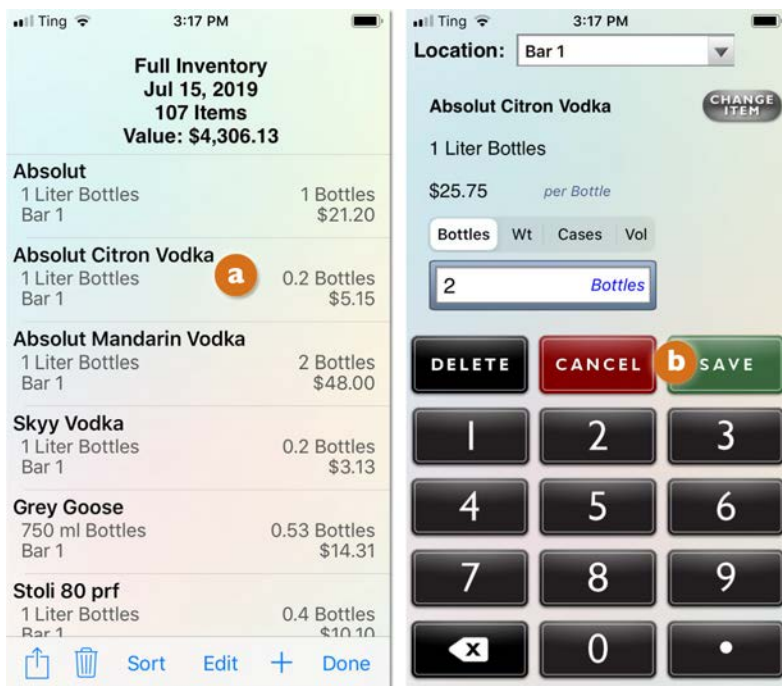
Deleting Inventory Items

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

1. Swiping your finger horizontally across an Item **a** in the Inventory screen and then pressing the Delete button.

2. Or press the **DELETE** button **b** in the Inventory Item screen.
   After you press **DELETE**, an action menu will appear. Press **Delete** to confirm you would like to delete the Item **c** or press **Cancel** to keep it.
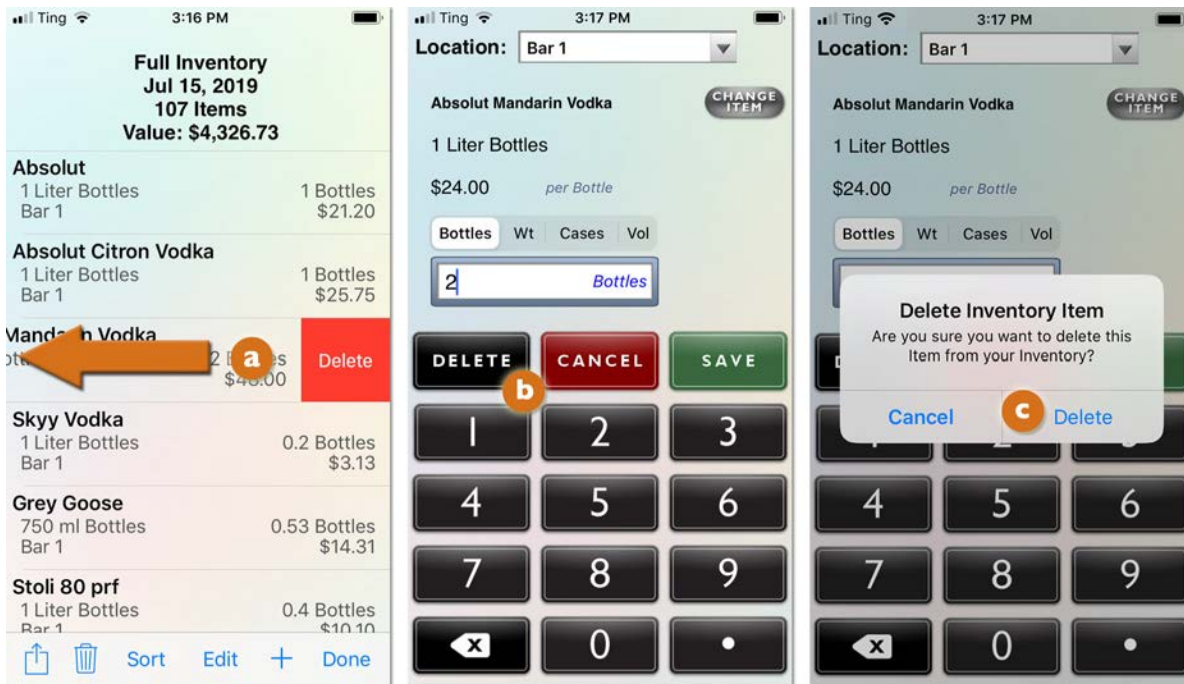
Double-Check Your Inventory

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

1. The easiest way to do that is to select the Inventory you'd like to double-check in BarkeepApp.
2. On the Inventory screen, press **Sort** at the ⓐ bottom of the toolbar.
3. An action menu appears with four options to sort your Inventory. ⓑ Select **First to Last**.
4. This will display all of the Items in the Inventory in the same order that you added them.
5. Working from this list, go back through your Inventory and check each Item against the quantity that you entered in the Inventory. If you find any mistakes or missing Items, you can immediately modify or add them from the Inventory screen.
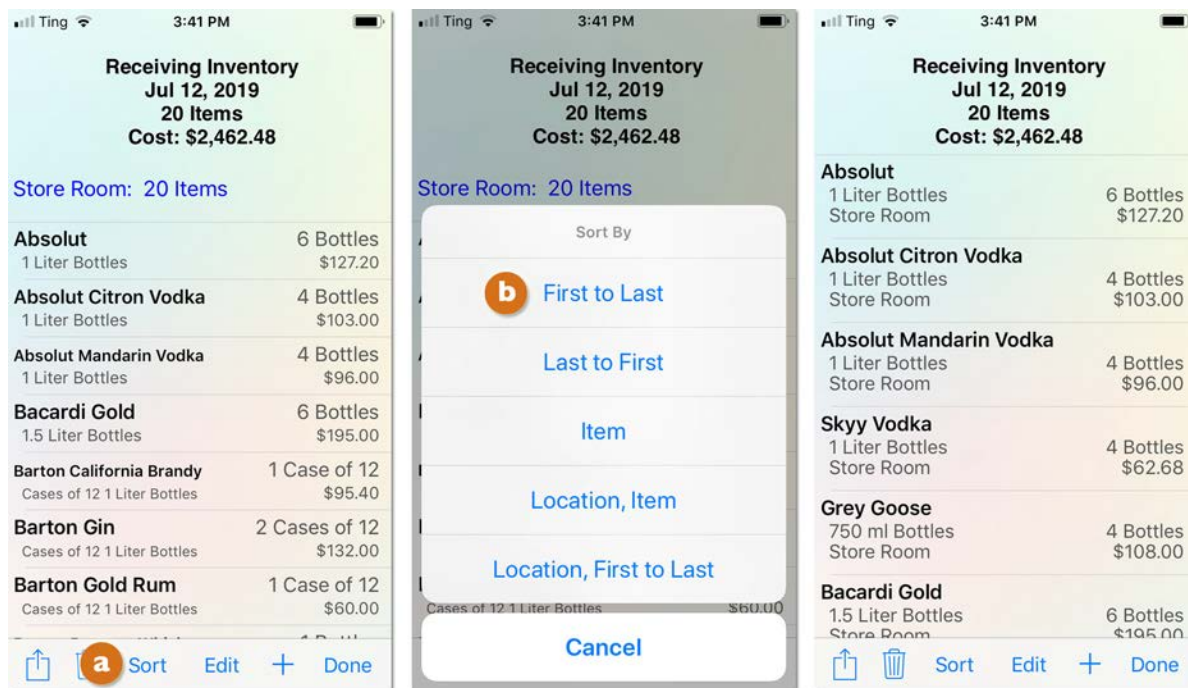
Note: Alternatively, if you prefer to work from paper, you can print the Inventory Detail Report, which will display each Item that you added to the Inventory in the same order that you added them. From this report, you can double-check each Item that you added to the Inventory to confirm that the quantity, Location, and units are all correct.

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

Saving Time with Repeat Inventories

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

> **A Repeat Inventory Example — How we use Repeat Inventories in our own club.**
>
> We perform a Premium Liquor Inventory every day. This involves counting all the Premium Liquor Inventory in five different Locations and weighing all partial bottles. The size of our daily Premium Inventory is 110 Items in five Locations.
>
> Our Premium Liquor Inventory is exactly the same process every day. We know how many Items should be in each Location. We rarely add new Premium Liquor Items, so the Items are the same every day — only the quantities vary.
>
> When taking inventory, we had to be careful to remember to switch back and forth between Bottles and Weight, otherwise we would end up with entries like 63.2 Bottles or .7 oz. It's an easy mistake to make. Using a Repeat Inventory automatically selects the correct Quantity Type based on the entry in the previous Inventory, helping to speed up the process and minimize mistakes.

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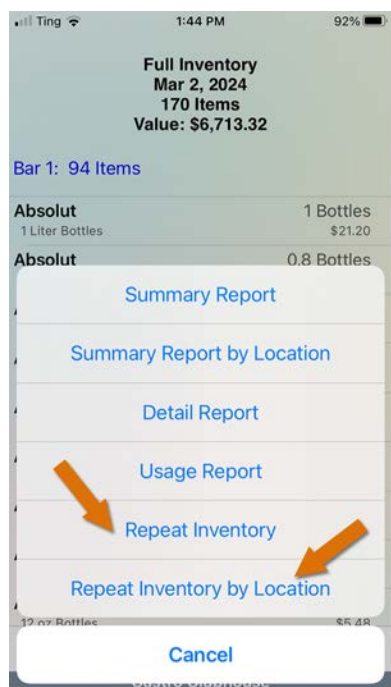
When you select Repeat Inventory by Location, Barkeep allows you to select each Location from the original inventory in any order that you choose.

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

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

Repeat Inventories (cont.)

To start a Repeat Inventory, do the following steps:

1. Select the existing Inventory you would like to use for a Repeat Inventory.
2. Press the action ⬆️ icon on **a** the toolbar at the bottom of the Inventory screen.
3. Choose **b** **Repeat Inventory**.
4. This will take you to the first Inventory Item screen. **c** Barkeep has created a new Repeat Inventory with the same Inventory Type as the original Inventory that you are repeating.
5. The Inventory Item screen appears with the Location, Item, and Quantity Type (Bottles / Wt / Cases) automatically filled in for you with the details for the first Item in the original Inventory.
6. The quantity from the original Inventory is highlighted. You will then be asked to enter a quantity for each Item **d** that exists in the original Inventory.
7. If the quantity is the same, press the **ADD** button. Or change and enter the quantity for the Item, press the **ADD** button. **e** This will add the Item to the Repeat Inventory.
8. Automatically the next Item from the original Inventory will appear. Continue to enter quantities for each Item individually until you have entered quantities for each Item in the original Inventory.
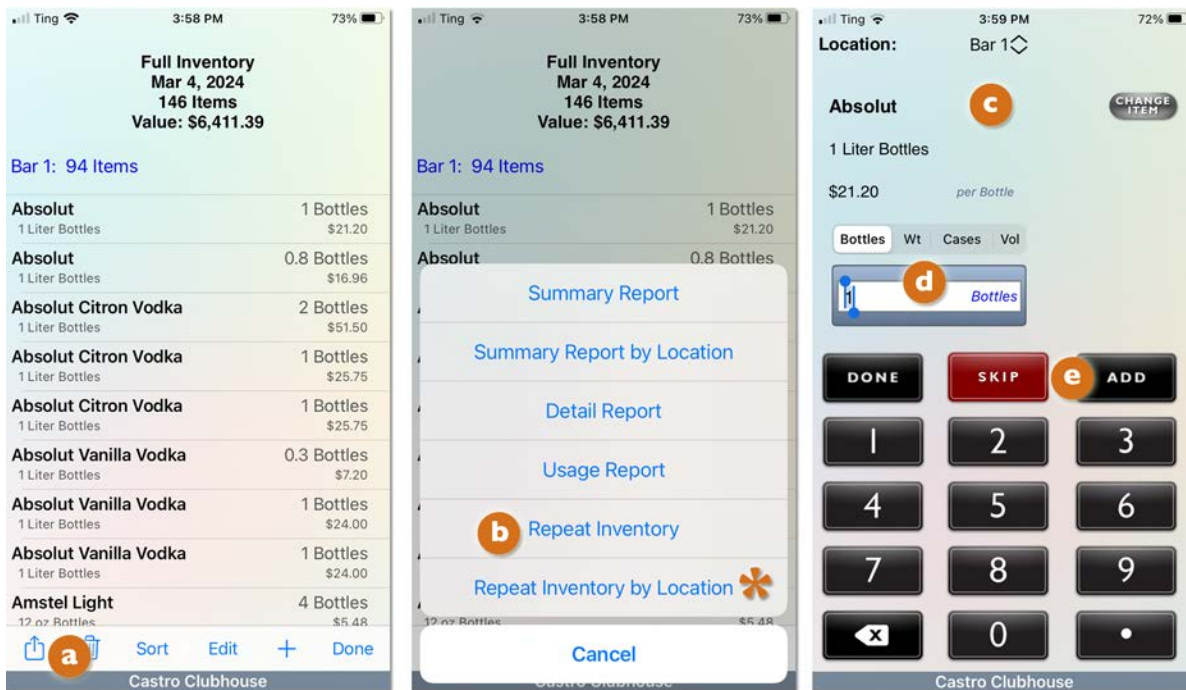
Note: In a Repeat Inventory you do not need to choose an Item, scan any bottles, select a Location, or choose a quantity type. Each of these was automatically filled in for you based on the Item details in the original Inventory.

✳️ Instructions for the **Repeat Inventory by Location** feature are after page 105.

100

Pre-filled Quantities in Repeat Inventories

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

Here is how Repeat Inventories work:

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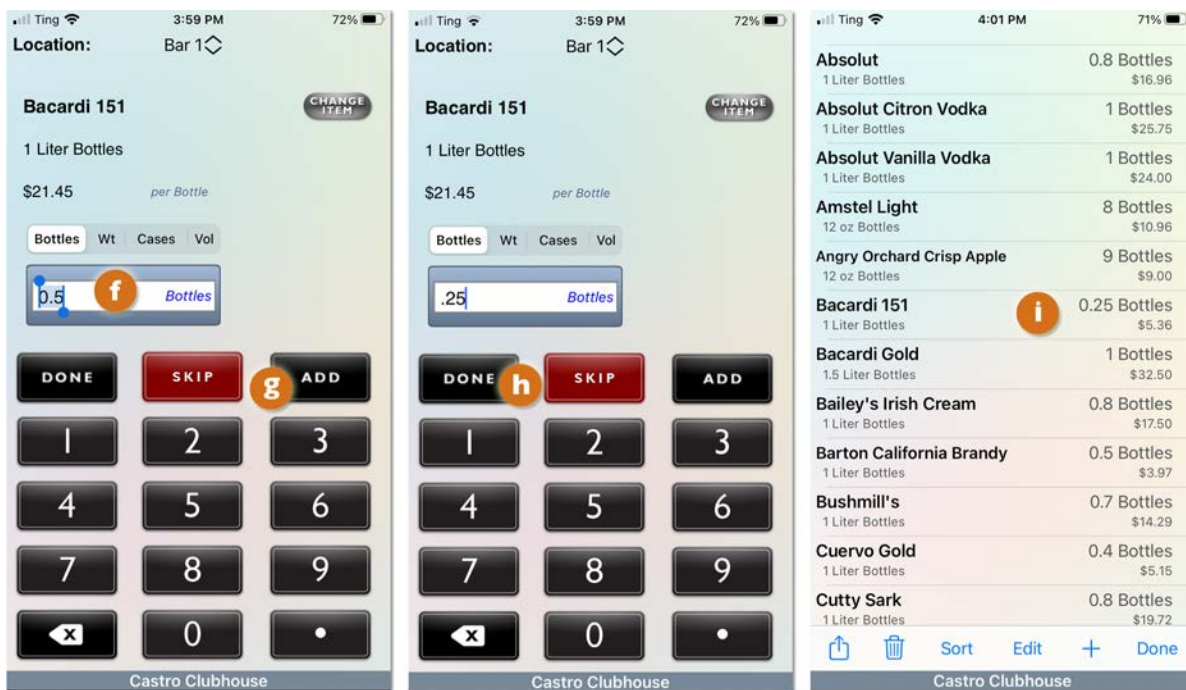
Repeat Inventories – Skipping Items

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

For example, if there is no **Bacardi 151** at **Bar 1** today because someone forgot to restock last night, and the Inventory Details screen is displaying:

- Location: **Bar 1**
- Item: **Bacardi 151** – 1 liter
- Quantity Type: Bottles

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

Option 1

1. First, you can skip the **Bacardi 151** Item by pressing SKIP button. **a**
2. This will move on to the next Item in the original Inventory without entering a **Bacardi 151** Item for **Bar 1** in your Repeat Inventory.
3. The Repeat Inventory will NOT contain an entry for any Items that were skipped. So, the Repeat Inventory will have fewer entries than the original Inventory.

Option 2

1. On the other hand, if you want to make sure that you always have the same number of Items in your Inventory (so that you are sure you didn't accidentally miss anything), you can also simply enter the quantity **0** and **b** the ADD button. **c**
   This will add the **Bacardi 151** Item at Bar 1 to the Repeat Inventory, but the quantity is zero, so it does not affect your Inventory totals.

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

To interrupt a Repeat Inventory, do the following:

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

   Note: You continue from the Repeat Inventory, <u>not</u> the original Inventory.
   If there are no more Items in the original Inventory that have not already been Added or Skipped, then the Continue option will not be displayed. The Continue option is only available if there are additional Items in the original Inventory that can be added to the Repeat Inventory.
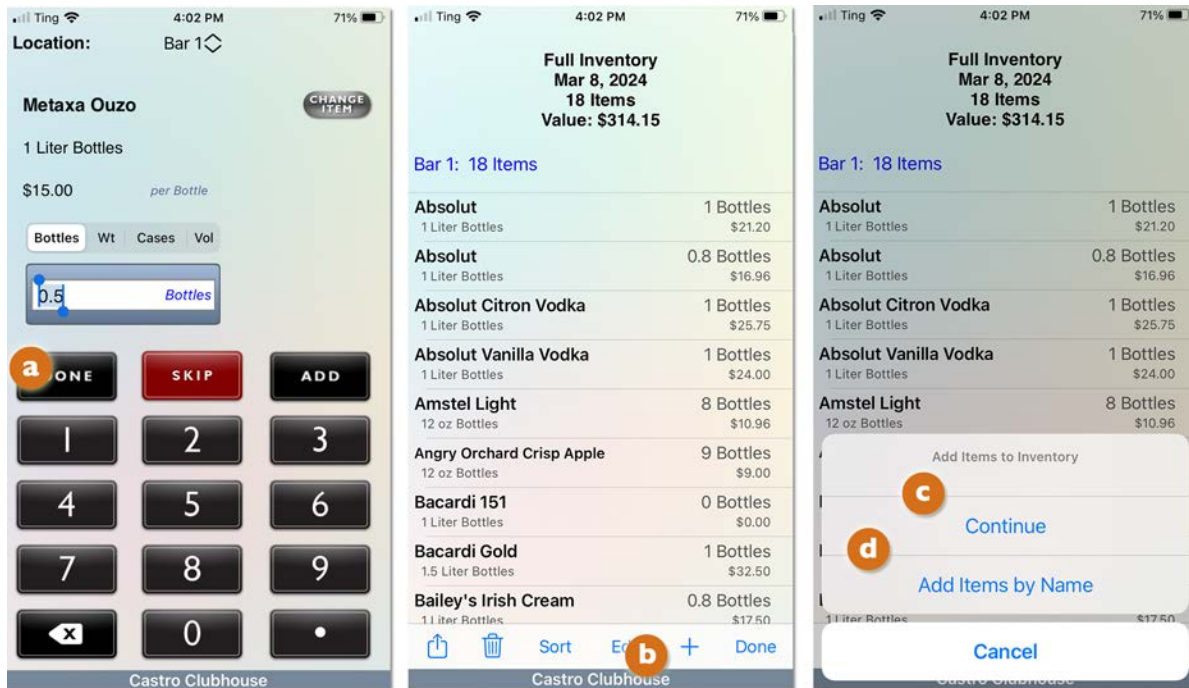
Adding a New Item to a Repeat Inventory

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

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

Repeat Inventory by Location

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

1. First you select **Repeat Inventory by Location**. **a**
2. Next choose any Location **b** that has entries in the original Inventory.
3. The basic steps **c** for adding Items are the same as in a regular Repeat Inventory (see previous pages).
4. Begin adding Items and start repeating the Inventory for the Location.
5. Like in a regular Repeat Inventory, you can interrupt the Inventory by pressing the **DONE** button. **d**

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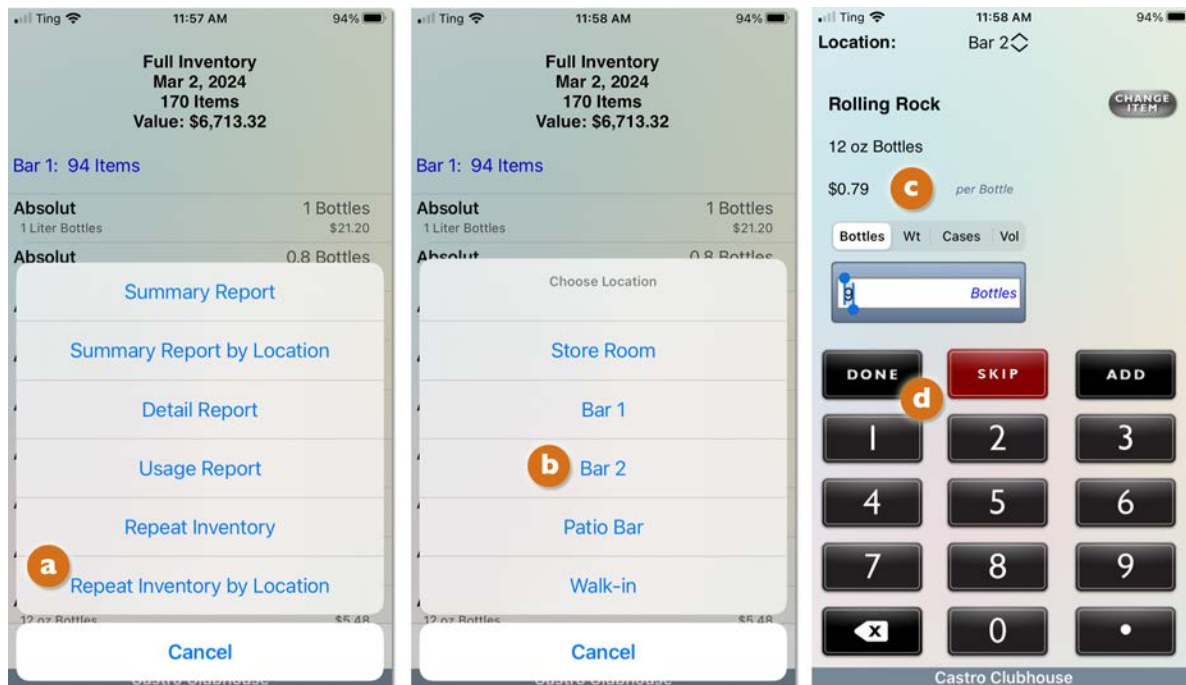
[*] This feature is not yet available in BarkeepOnline but will be including in an upcoming release.

6. Even after you interrupt a Repeat Inventory, you can still come back, press the ⊞ icon and continue the Repeat Inventory in the same Location **e** (i.e., **Continue with Bar 2**)

7. When the Location is complete you will return to the Inventory screen. **f**

8. You can stay in that Location and **Add Items by Name** or choose **g** **Continue with Next Location**.

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

    Note: We recommend completing the Repeat Inventory in all your Locations before adding new/additional Items.
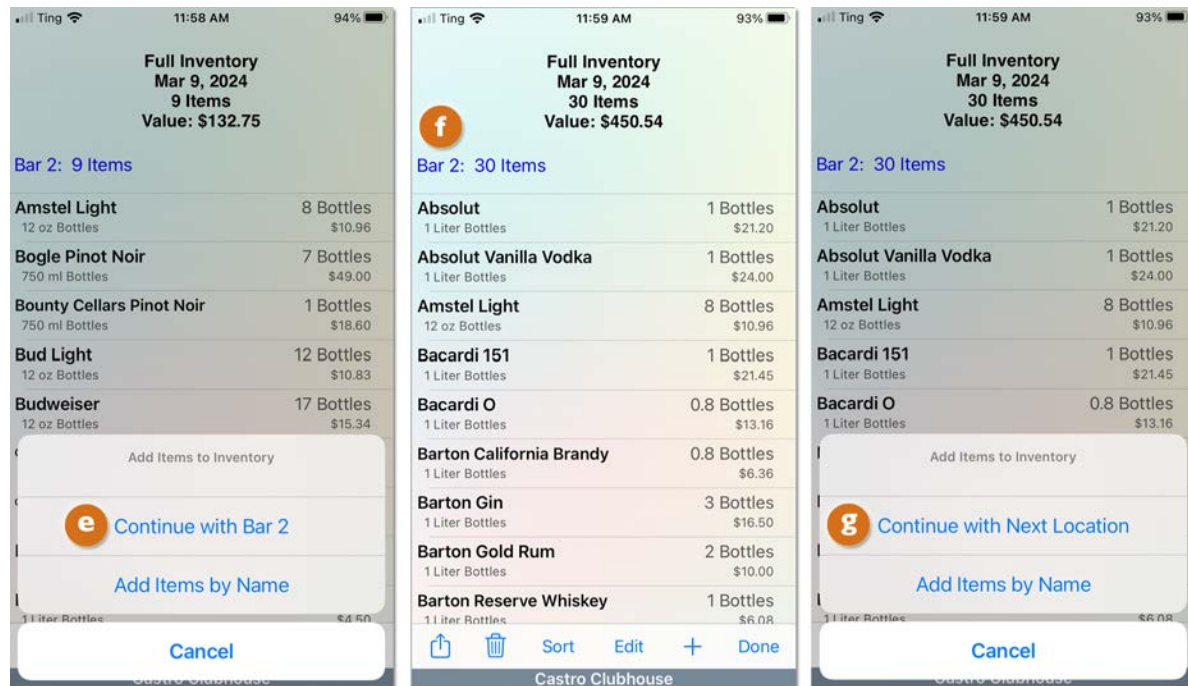
9. When you continue to the next Location, you will repeat the same steps.
    Note: You must complete the repeat process for the Location before you choose a different Location. You will not be able to return to the Location and continue the repeat process.

10. After you have completed the repeat process, you can choose to **Add Items by Name**. Add those Items to their appropriate Location(s).

11. You also can add Items to an additional Location not in the original Inventory.

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

Yes! But there are a few limits:
✓ Before you start, the new Repeat Inventory by Location must sync to other **IOS** Device(s).
✓ You cannot use more than one **IOS** Device for any Location in the same Repeat Inventory by Location.
✓ Your co-workers can continue the Repeat Inventory on their device by selecting the ➕ icon in the inventory details screen and choosing **Continue with Next Location**. 🟠h
✓ BarkeepApp will only display the Location(s) 🟠i that are still available,
✓ You cannot start repeating a location on one **IOS** Device and then finish it on a different **IOS** Device.
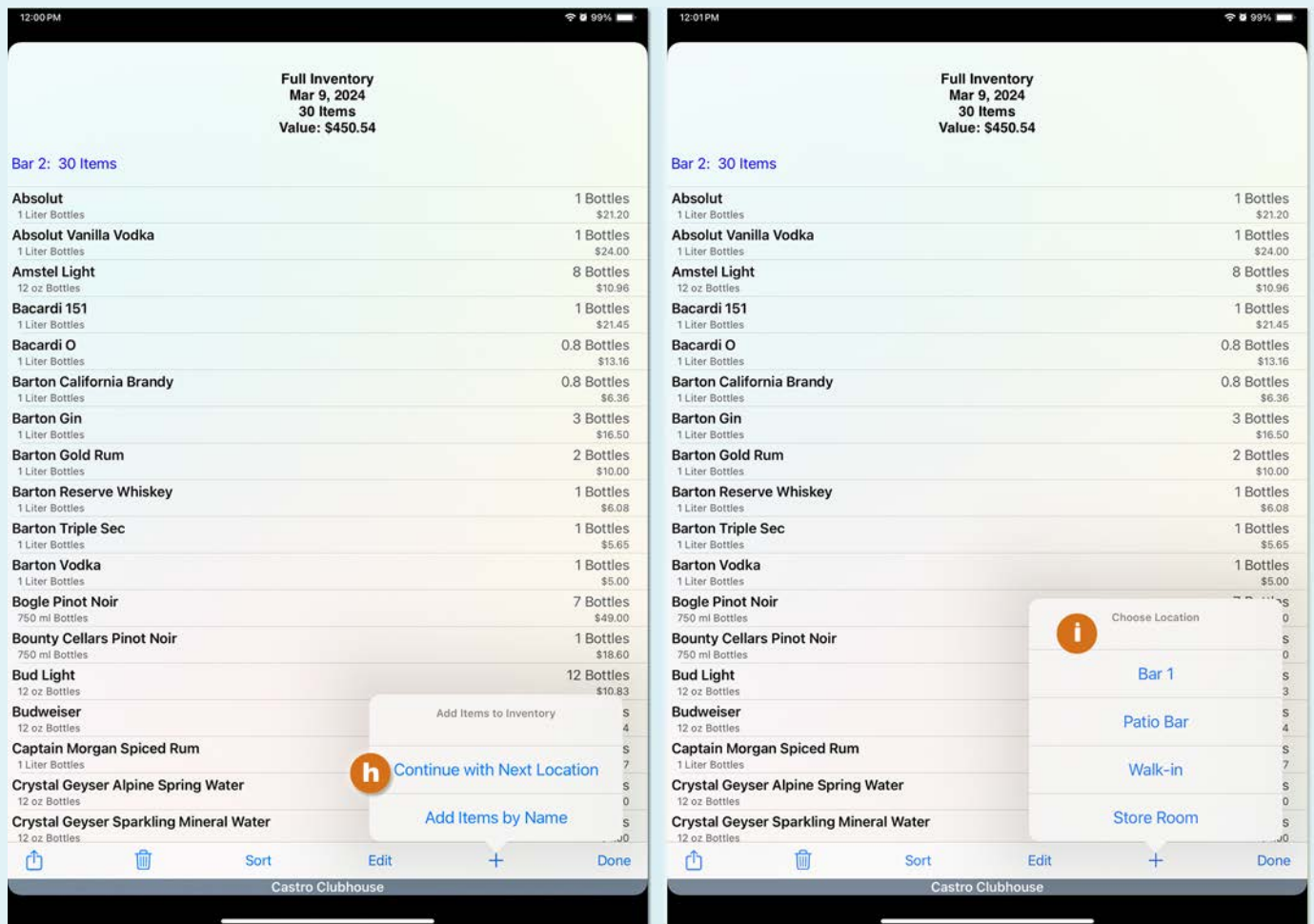
Transfer Inventories

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

> **Tracking Liquor by Location with limited Full Inventories**
> When you choose to do Full Inventories that are only in certain Locations, it is crucial that you always do Transfer Inventories.
> For example, some users do a weekly Full Inventory where they count everything in the building, in all their Locations. They also do a daily "Full" Inventory where they only count in their bar station Locations.   In order to run accurate Reports based on their limited "Full" Inventories, they to do Transfer Inventories when they move Items to the bar stations (i.e., stock the bar).

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

To create a Transfer Inventory, follow the same steps used to create other Inventories:
1. Press Inventories on the Main Screen then go to the Inventories screen.
2. Next, press the ⊞ icon on the bottom toolbar on the Inventories screen **(a)** to create a new Inventory.
3. On the Create Inventory screen, choose "Transfer." **(b)**
4. You can set various details **(c)** for the Inventory like the Date/Time the Inventory was taken, a general description, etc.
5. When you create a Transfer Inventory you <u>must</u> select a Location. This is the Location you are transferring Items from. Press **Edit (d)** to activate the screen where you choose a Location.
6. After you have made your choice, press **Save**. **(e)**
7. After pressing **Save** you will return to the Create Inventory screen **(f)** where you can press **Start Inventory** to save the new Inventory or select **Cancel** to discard it.

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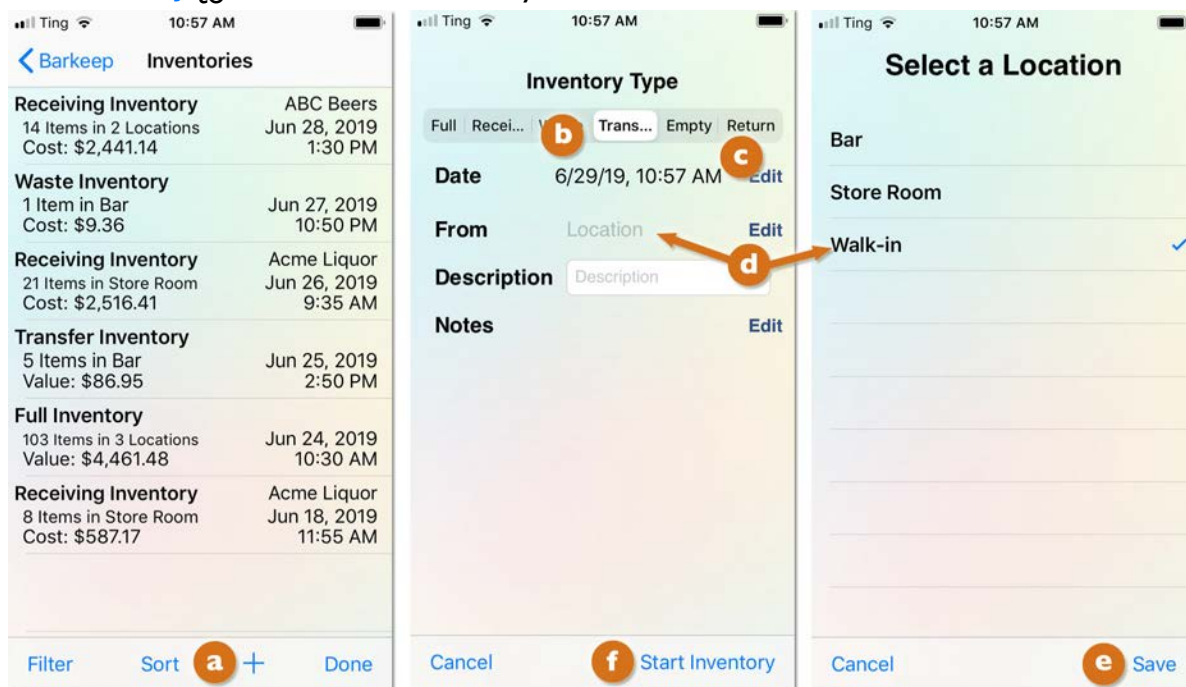
[*] **Note:** You can use Barkeep effectively without creating Transfer Inventories, but when if you want detailed Reports in BarkeepOnline grouped by Location, you will need Transfer Inventories for when you move Items between your different Locations (e.g., from the Walk-in to the Bar, etc.)

Transfer Inventories (cont.)

8. After the Transfer Inventory is created. You will automatically navigate to the Search Items screen for the new Transfer Inventory.
9. You can add Items by searching. **g** Or you can start scanning Items by **h** pressing the scan icon. The scanning steps are the same as with other types of Inventories.
10. At the top of the screen, you will notice the Location menu. **i** Pressing the menu drops down your list of Locations and allows you to select a Location to transfer the Item(s) to (e.g., **Bar**).
11. The example below shows a search for the Items containing "bud" as you are looking for **Budweiser**.
12. When you select the Item (**Budweiser**), Barkeep takes you to a new screen where you can add the quantity **j** of bottles (or cases) you are moving from the **Walk-in** to **Bar**.
13. Then press the **ADD** button **k** to complete the transfer or the **CANCEL** button to discard your changes.
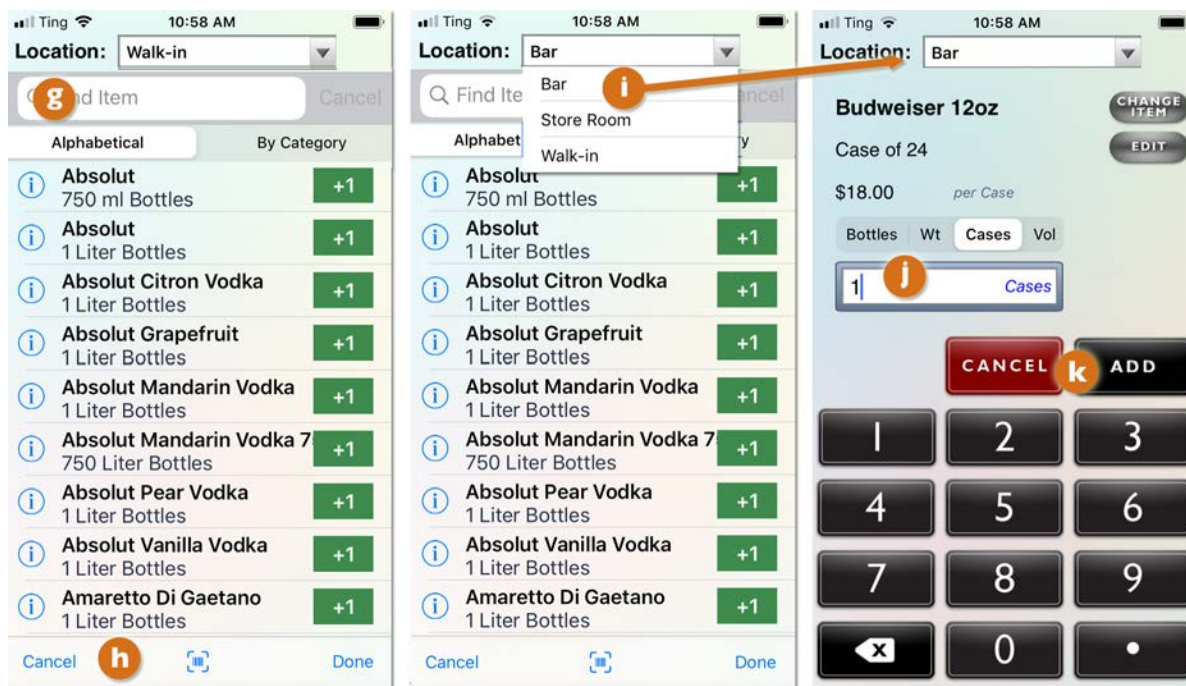
Reminder: You can transfer Items to multiple Locations in one Transfer Inventory.
For example, you might remove 24 bottles **Budweiser** from your **Walk-in Cooler** and put 12 bottles in each of two bar station areas (e.g., **Bar 1** and **Patio Lounge**). To do so you would select **Walk-in Cooler** as your *transfer from* Location and then first add 12 bottles moving them to the *transfer to* Location **Bar 1** (as shown above), and then repeat the step but change your *transfer to* Location to show **Patio Lounge**.

> **Can I use a Transfer Inventory when I move Items between different venues?**
> No. A Transfer Inventory is only used for transferring Items between Locations in a single venue/club. If you have more than one venue and more than one Barkeep account, do not use a Transfer Inventory when you move Items between venues. When you remove Items, you would account for them in a Return Inventory and then account for the Items in a Receiving Inventory in the venue you deliver them into.
> Also see barkeepapp.com for a guide with tips for managing **Multiple Venues**.

Waste Inventories

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

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

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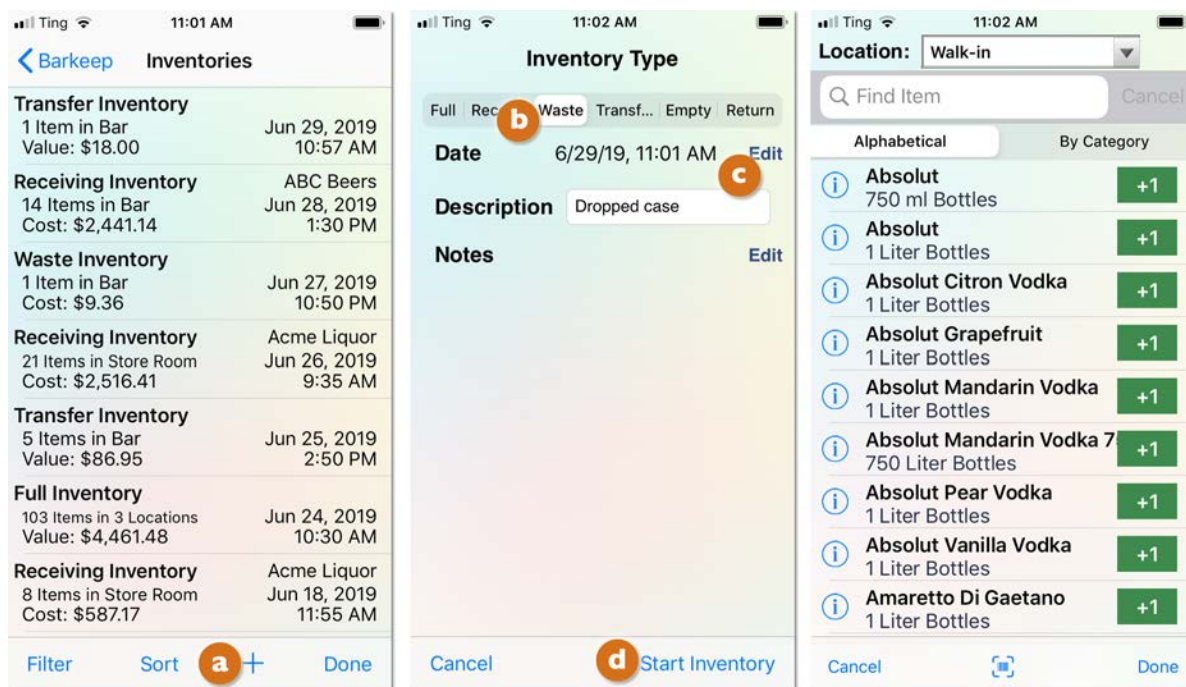
Waste Inventories (cont.)

8. You can add Items by searching. **e** Or you can start scanning Items by **f** pressing the scan icon. The scanning steps are the same as with other types of Inventories.

9. At the top of the screen, you will notice the Location menu. **g** Pressing the menu drops down your list of Locations and allows you to select the Location where the waste occurred (e.g., **Walk-in**).

10. Now you can start adding Items to your Inventory following the same steps you would with any other Inventory.

11. The example below shows a Waste Inventory for a case of **Budweiser** dropped in your **Walk-in**. Search for the Items containing "bud" as you are looking for **Budweiser**.

12. When you select the Item (**Budweiser**), Barkeep takes you to a new screen where you can add the quantity **h** of cases (or bottles) you need to add to the Inventory.

    In this example, be sure to select "Cases." **i**

13. Then press the **ADD** button **j** to add the Item to the Waste Inventory or the **CANCEL** button to discard your changes.
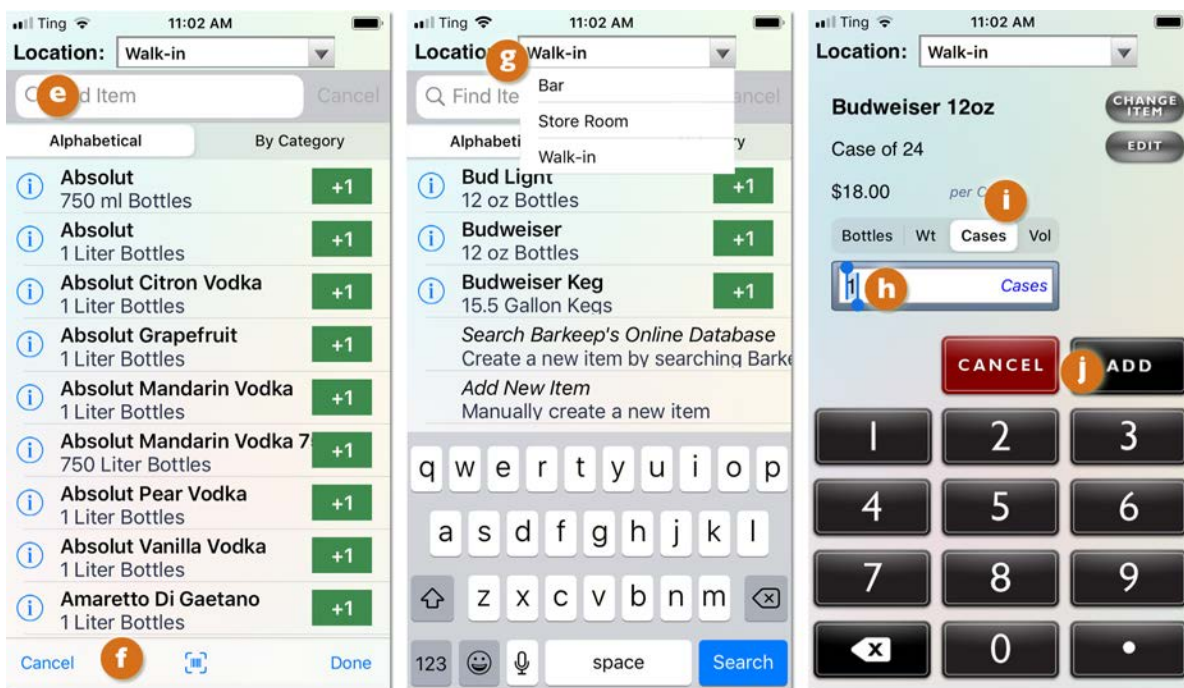
Note: You can also add a quantity to an Inventory by volume. For example, if a drink(s) was spilled before it was served a Waste Inventory could show the amount of liquor, wine or beer wasted in ounces.

Empties Inventories

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

- Have more accurate data for generating Order Reports in BarkeepOnline. Especially when you place orders more frequently than you conduct Full Inventories.
- Compare the Empties totals to Usage totals to track discrepancies. Empties Inventories have no effect on your Usage Reports. Inventories can help you track down Items that appear to be going missing.
  For example, if your Empties Inventory shows 7 empty bottles of Jack Daniels and your Usage Report shows that you've used 8 bottles, then you *may* have a missing bottle to track down. This could indicate a bottle was stolen, miscounted, or that a bottle was dropped and broken. Broken bottles need to be entered into a Waste Inventory.

To create an Empties Inventory:

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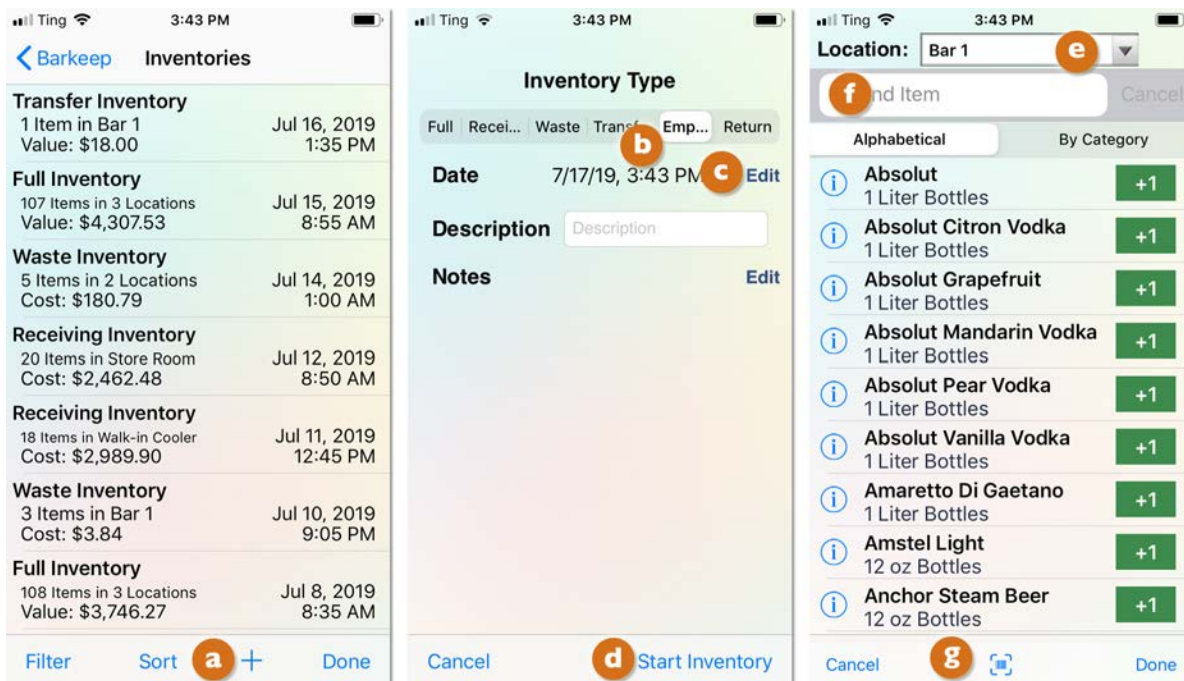
Receiving Inventories

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

We recommend always taking a Receiving Inventory after every delivery. Always create a separate Receiving Inventory for each delivery. These steps are crucial because you need to account for all Items you receive for Barkeep to generate correct Pour Cost, Variance Reports and Usage Reports. A Receiving Inventory does two important things:

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

Suppliers

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

To create or modify a Supplier:
1. Press Settings on the Main Screen then go to the Settings screen.
2. On the Settings screen, select **Suppliers**. **a**
3. Press the ⊞ icon on the bottom toolbar on the Suppliers screen **b** to create a new Supplier.
4. Or select an existing Supplier **c** if you wish to modify, add to or delete the Supplier's information.
5. Each Supplier has a Supplier Details screen where you add the Supplier's name **d** and any other details you want to keep track of in Barkeep.
6. Press **Save** to save **e** the new Supplier and your changes or select **Cancel** to discard it.
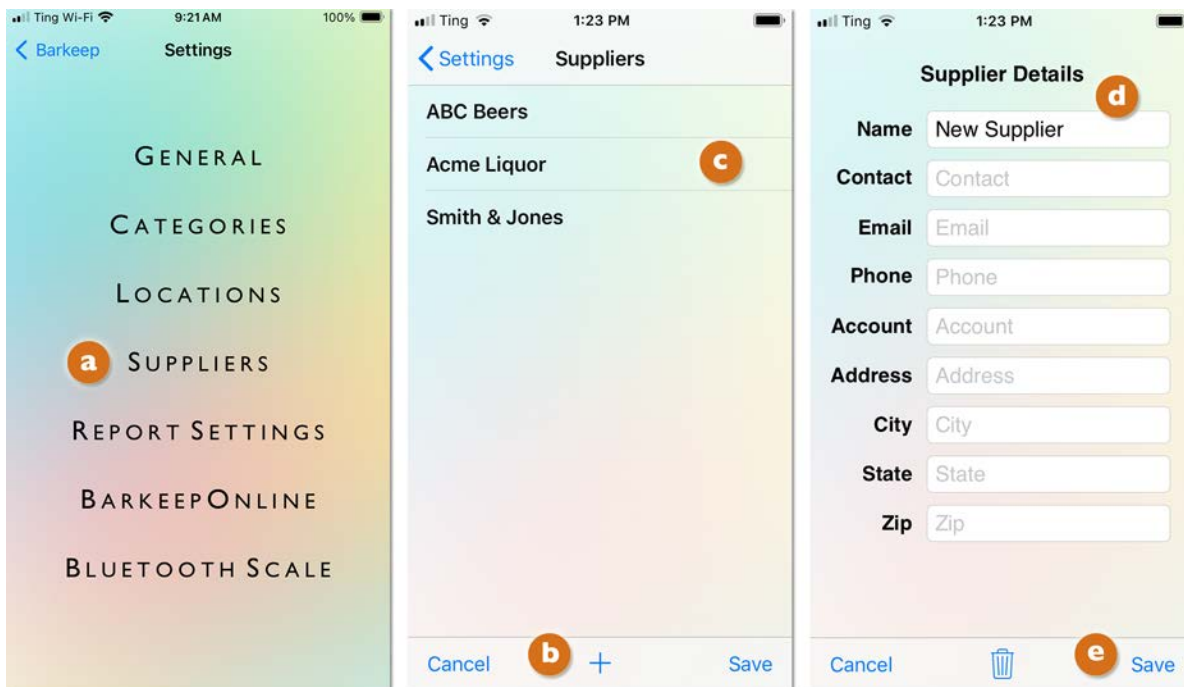
Note: Your Suppliers are also listed in your Item's Report.

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

Starting a Receiving Inventory

To create a Receiving Inventory:
1. Press Inventories on the Main Screen then go to the Inventories screen.
2. Next, press the ⊞ icon on the bottom toolbar on the Inventories screen **a** to create a new Inventory.
3. On the Create Inventory screen, choose "Receive." **b**
4. By default, the Date/Time for the Inventory will be the time you created it.
    a. You can select **Edit** if you wish to assign a specific Date/Time when the delivery occurred.
    b. If you are creating a Receiving Inventory much later, say the day after a delivery, we recommend editing the Date/Time to assure future Reports will be accurate. **c**
5. You can add details such as the invoice amount, invoice number and Supplier to a Receiving Inventory.
6. You can also add optional notes and descriptions for the Inventory.
7. Press **Start Inventory** to save **d** the new Inventory or select **Cancel** to discard it.
8. After the Receiving Inventory is created. You will automatically navigate to the Search Items screen for the new Receiving Inventory. **e**
9. Here you can start adding Items to your Inventory following the same steps you would with any other Inventory.
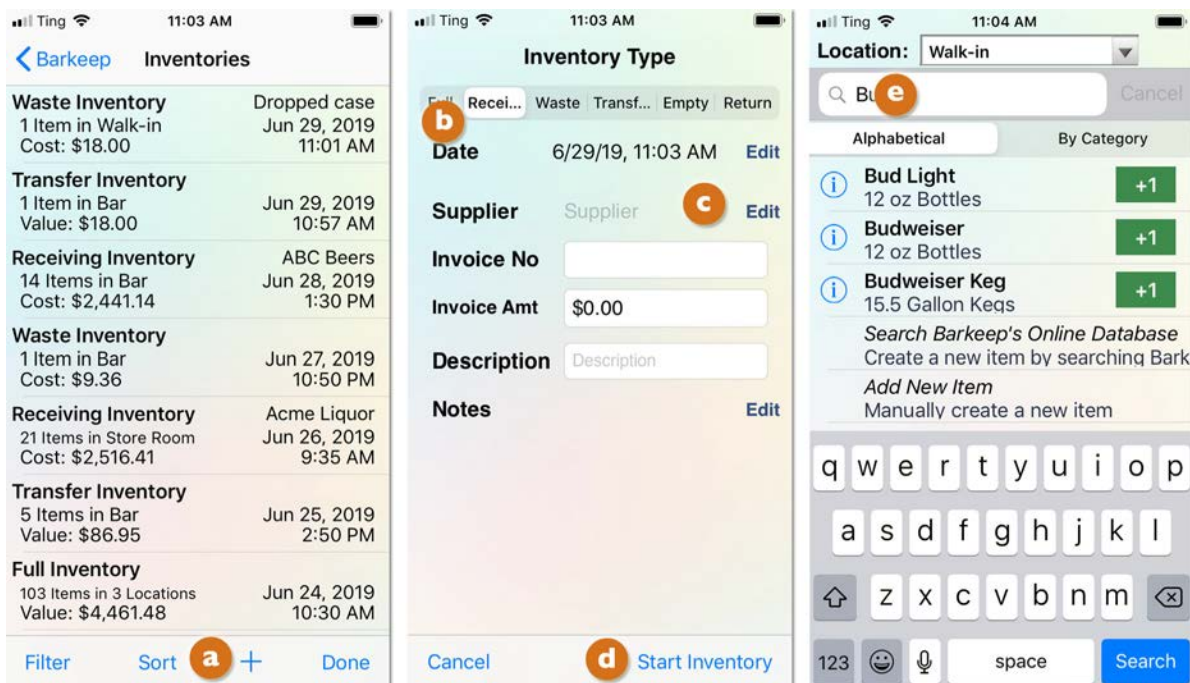
Receiving Inventories (cont.)

10. If you do not want to search for Items to add to your Inventory, press Cancel at the upper part of the screen. **f**

11. You can start scanning Items by pressing the scan icon. **g** The scanning steps are the same as with other types of Inventories.
    Note: If you are scanning cases, some Items may have a different UPC barcode on the outside of the case than on the actual bottle.

12. At the top of the screen, you will notice the Location menu:
    - Pressing the menu **h** drops down your list of Locations and allows you to select the Location where the delivery was received (e.g., **Walk-in**).
    - If you place the received Items in more than one Location (e.g., **Store Room** and **Walk-in**) be sure to switch Locations for those Items as needed during the Inventory.
    - We recommend adding all the Items for each Location before switching Locations.
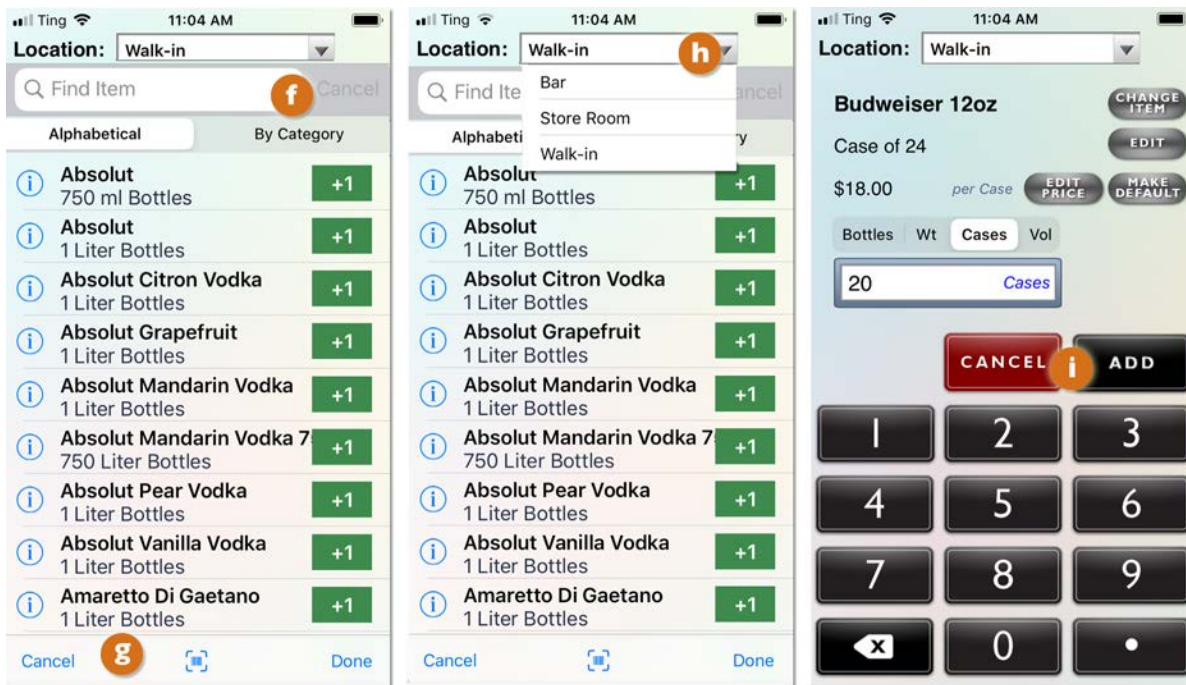
Most bars and clubs will be receiving Items to storage Locations such as a **Store Room** or **Walk-in**. As Items are moved to various Bar Locations, you will need to create a Transfer Inventory when you move those Items if you intend to track liquor usage by Location.

13. If you add Items by searching, or scanning, the final step for every Item is always to press the ADD button **i** to add the Item to the Receiving Inventory or the CANCEL button to discard the Item.

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

Receiving Inventories – Adding Cases

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

The example above shows where you can add Bottles of **Absolut** by the Bottle at $21.20 each or by the Case of 12 at $254.20 per Case. This feature can be particularly useful if your Supplier's invoice shows Items priced by the Case.

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

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

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

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

1. Select the Item from your Items List.
2. After selecting the Item, you will be taken to the Item Details screen.
3. Scroll down ⓐ and you'll see the barcode for the Single Item.
4. Select "Add New Barcode." ⓑ
5. On the Barcode Details screen select "Case." ⓒ
6. Barkeep's default Case Count is 12. ⓓ Change the Case Count if there is different number of bottles per bottles per case (e.g., 24).
7. You could enter the barcode manually, but let's assume you are scanning it.
8. On the bottom toolbar press the scan icon ⓔ to activate your Device's camera or **Linea Pro** scanner. The scanner will beep to indicate the barcode has been successfully scanned and added to the Item Details. If using your **iOS** Device's camera, press **Done** after the barcode is read.

9. Barkeep will take you back the Barcode Details screen.

10. Scroll down and notice there are now two barcodes **f** for the same Item.

11. Press to **Save** **g** the barcode or select **Cancel** to discard the changes.
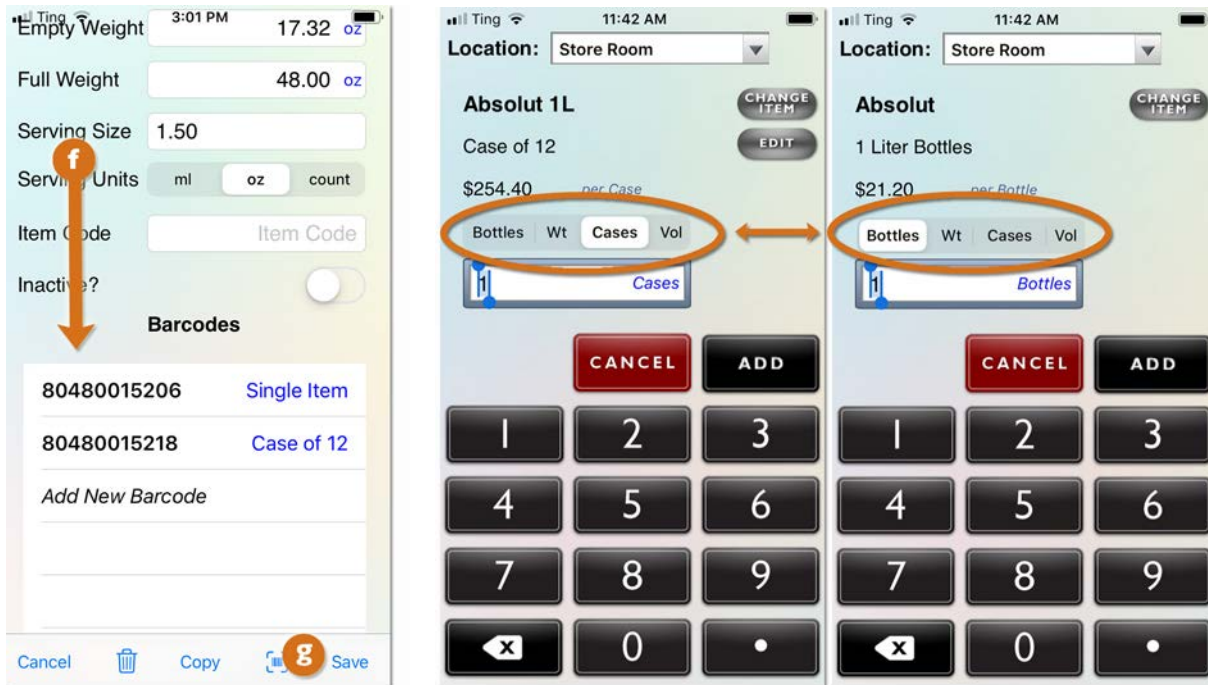
Cases vs. Bottles – an important reminder!

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

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

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

Important: We recommend only scanning barcodes for full cases.

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

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

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

Also see barkeepapp.com for a guide with tips for managing **Multiple Venues**.

Receiving Inventories (cont.)
Verifying Amount Totals

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

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

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

Receiving Inventories (cont.)
Price Changes

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

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

1. Your Inventory Cost (total) is $2,812.48 **a** but your Supplier's Invoice shows a total of $2,821.48 (**see previous page** for example).
2. Review your Receiving Inventory and compare it to your Supplier's Invoice and look for discrepancies.
3. Discover that your Supplier charged $95.00 per keg of **Budweiser** and the price you have for the Item in Barkeep is $92.00 per keg.
4. Select the Item **Budweiser Keg** **b** and choose the 〔EDIT PRICE〕 button to **c** edit the price.
   4a. If the change is permanent, and it is the Item's new default price, select the 〔MAKE DEFAULT〕 button. **d**
   4b. An alert will appear verifying the changed price. **e** Press "**Ok**" to continue.
5. Press 〔ADD〕 to save **f** the new price or select 〔CANCEL〕 to discard the price change.
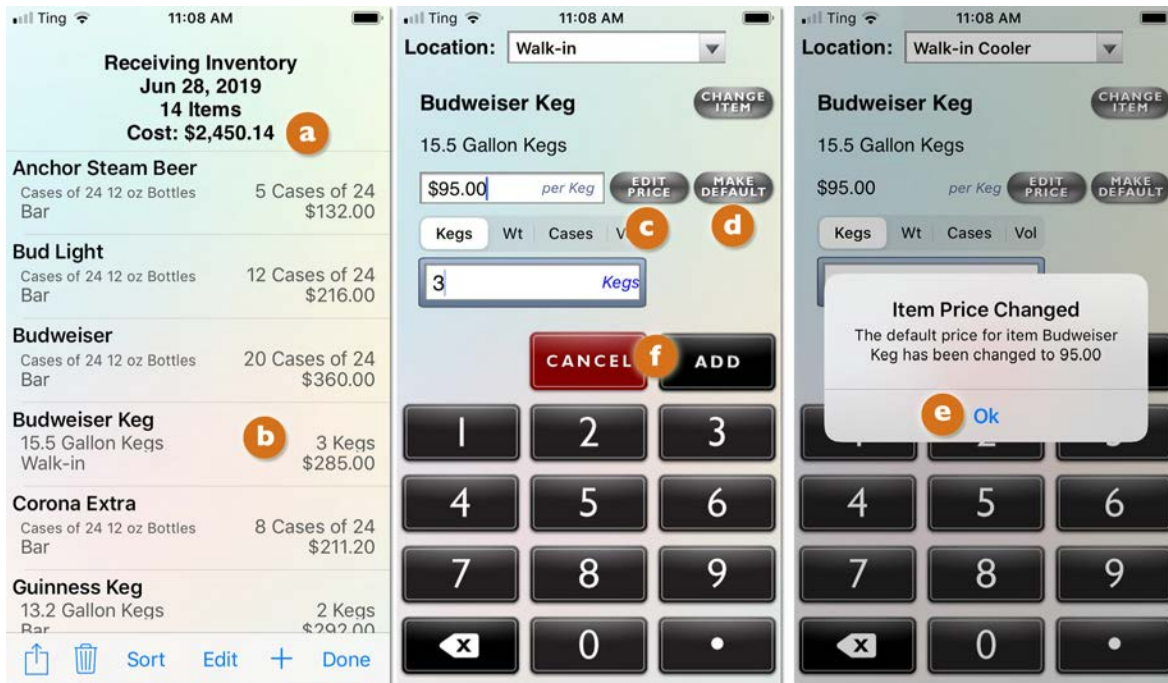
Note: You can only change prices in a Receiving or Return Inventory. You cannot change a price when conducting other types of Inventories. The other way to change an Item's price is to edit an Item in your Item's List.

Receiving Inventories (cont.)
Distributor Promotions and Free Products

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

> **What happens when my Supplier charges a special price or gives me products for free?**
> With every Receiving Inventory, it is essential that you enter the price you pay for the Item for that particular delivery. If the price is discounted, enter the price you paid for the Item for that delivery. If you receive Items for free, you should enter the Items and enter the price you pay as $0.
>
> **Do I have to count and add free Items to my Receiving Inventory?**
> Yes! Even if you receive products for free, you need to add them to a Receiving Inventory. If you do not add the Items, your future Reports will be inaccurate.

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

- For you, **Bacardi Coconut Rum** is a new Item. **a** Before you can add the Item to an Inventory, you need to add it to your Items List. Even though you are receiving it free, we recommend adding the Supplier's price **b** to the Item Details.
- When you add the Item to your Receiving Inventory, choose the EDIT PRICE button to **c** edit the price, and change it to $0 and ADD the Item. **d** Do <u>not</u> select the MAKE DEFAULT button.
- When you review the Receiving Inventory, **e** note the quantity for **Bacardi Coconut Rum** is 1 bottle and the cost is $0.00
- With a 2-for-1 promotion, like in this example with **Midori**, **f** we recommend entering the Item the way it appears on the Supplier's invoice. For example, our invoice had one line for a bottle of **Midori** at the regular price ($19.00). For the second bottle, **Midori** was listed with a cost of $0. We chose the EDIT PRICE button and changed the price to $0 for that bottle. You also might enter a quantity of 2 and edit the price to half the normal cost (i.e., $9.50) if the Item appears that way on a Supplier's invoice.
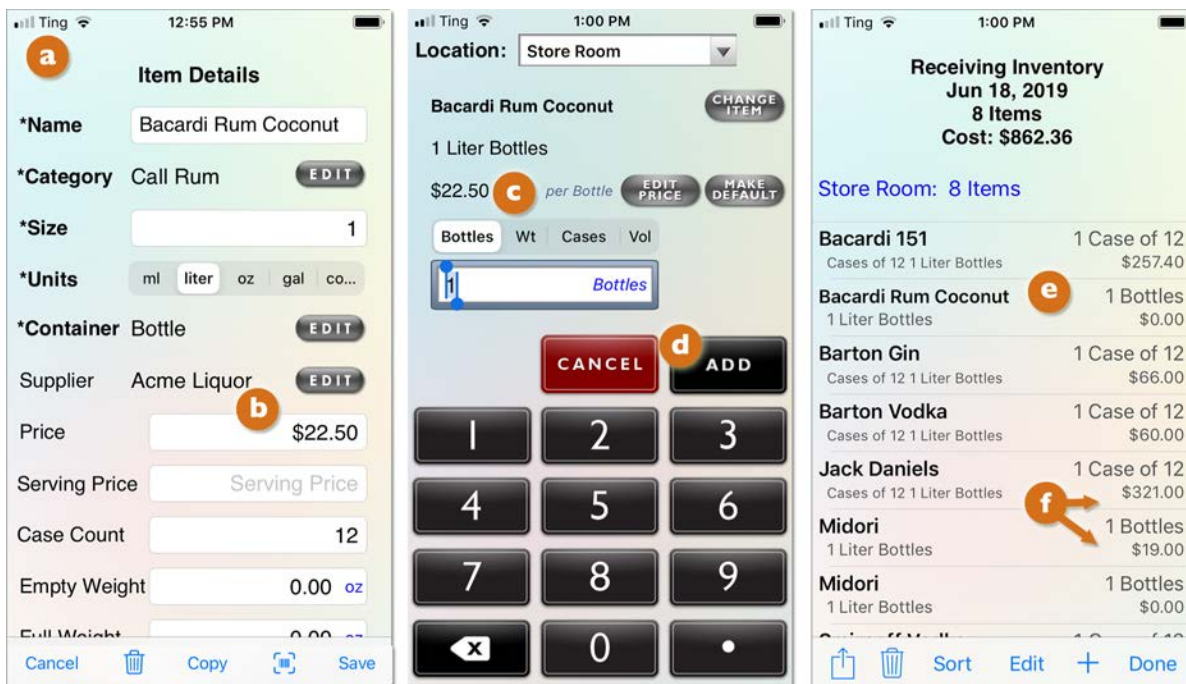
Receiving Inventories (cont.)
Adding Suppliers to Receiving Inventories

To add a Supplier to a Receiving Inventory:
1. On the bottom toolbar press **Edit**. **a**
2. On the Inventory Type screen, press **Edit** **b** next to the Supplier field.
3. This activates a screen with a picker **c** where you choose one of your Suppliers to assign to the Receiving Inventory (e.g., **ABC Beers**).
4. Press **Save** **d** your choice or select **Cancel** to discard it.
5. The final step is to press Save **e** on the bottom toolbar of the Inventory Type screen.
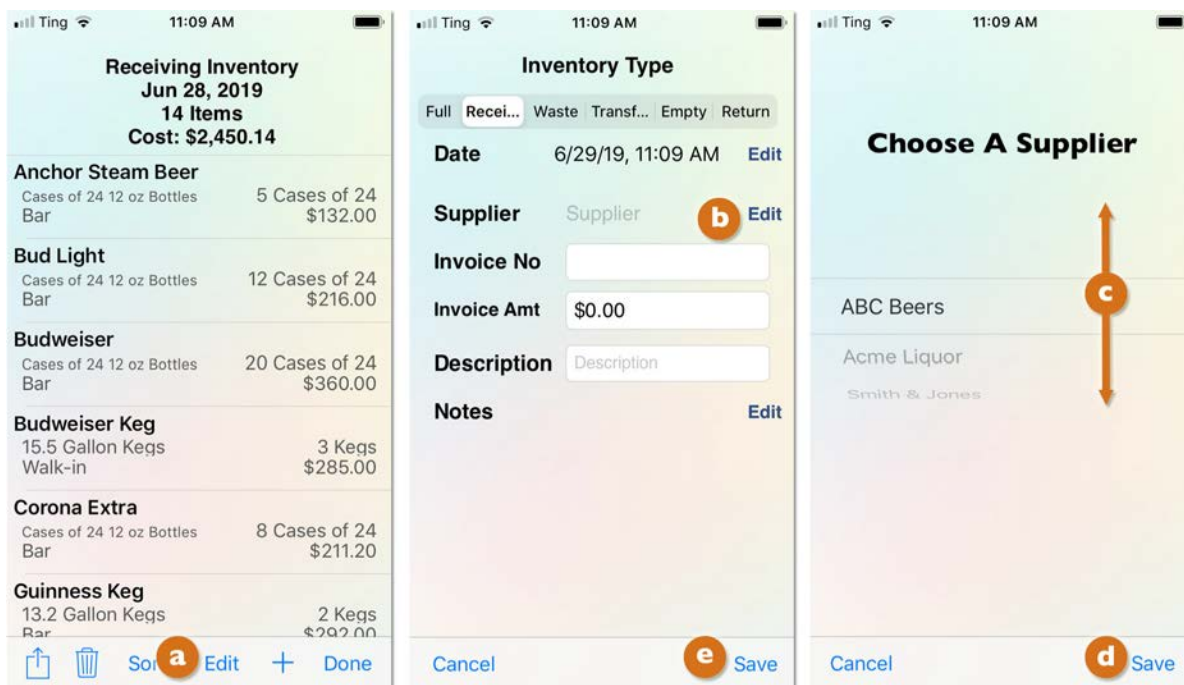
Note: If you need to add a new Supplier to the Inventory, first you need to go to the Supplier screen in your Settings. **See page 111** for instructions.

Receiving Reports

BarkeepOnline users have the option to run a Receiving Report.

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

Perpetual Reports

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

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

Return Inventories

Return Inventories are ways to account for products returned to a Supplier.* They are basically the opposite of Receiving Inventories. These typically match up to credit invoices from your Supplier.

Items entered into Return Inventories will show up as negative amounts in the Received column of a Usage Report.

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

To create a Return Inventory:
1. Press Inventories on the Main Screen then go to the Inventories screen.
2. Next, press the ➕ icon on the bottom toolbar on the Inventories screen **a** to create a new Inventory.
3. On the Create Inventory screen, choose Return Inventory. **b**
4. You can set various details **c** for the Inventory like the Date/Time the Inventory was taken, a Supplier invoice number, invoice amount, a general description, etc.
5. Press **Start Inventory** to save the new Inventory or select **Cancel** to discard it. **d**
6. You will automatically navigate to the Search Items screen for the new Receiving Inventory. **e** Here you can start adding Items to your Inventory following the same steps you would with any other Inventory.
7. Here you can start adding Items to your Inventory following the same steps you would with any other Inventory.
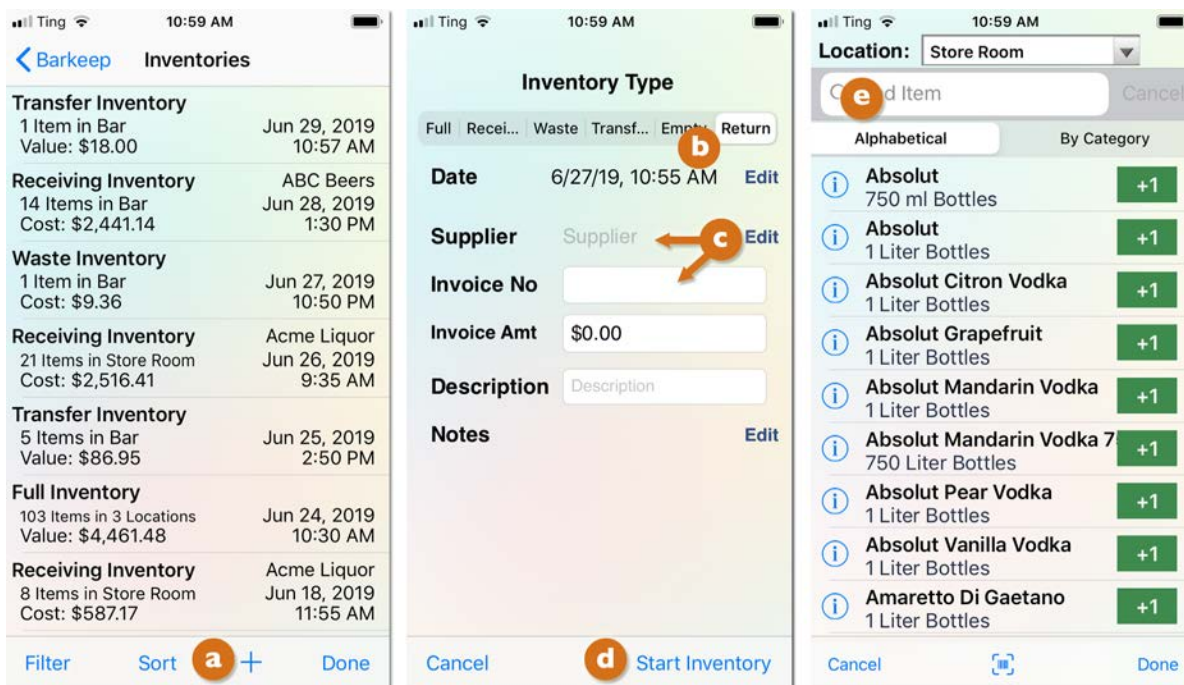
Note: You have the option to add a Supplier to a Return Inventory. The steps are the same as those shown on the previous page for adding Suppliers to a Receiving Inventory.

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

Deleting Inventories

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

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

To manually delete an Inventory:
1. On the Inventory screen **a** press the 🗑 icon on the bottom toolbar.
2. Press **Delete** to confirm you would like to delete the Inventory **b** or press **Cancel** to keep it.
3. Or you can also delete an Inventory from your Inventory List by swiping your finger horizontally across the Inventory on the List screen **c** and then pressing the Delete button.
   This will <u>immediately</u> delete the Inventory.
4. Deleting an Inventory is permanent.

   Note: BarkeepOnline users will have the Inventory permanently deleted from the BarkeepOnline Account after your Device Syncs Automatically to the Barkeep server. Only BarkeepOnline users can restore deleted Inventories.
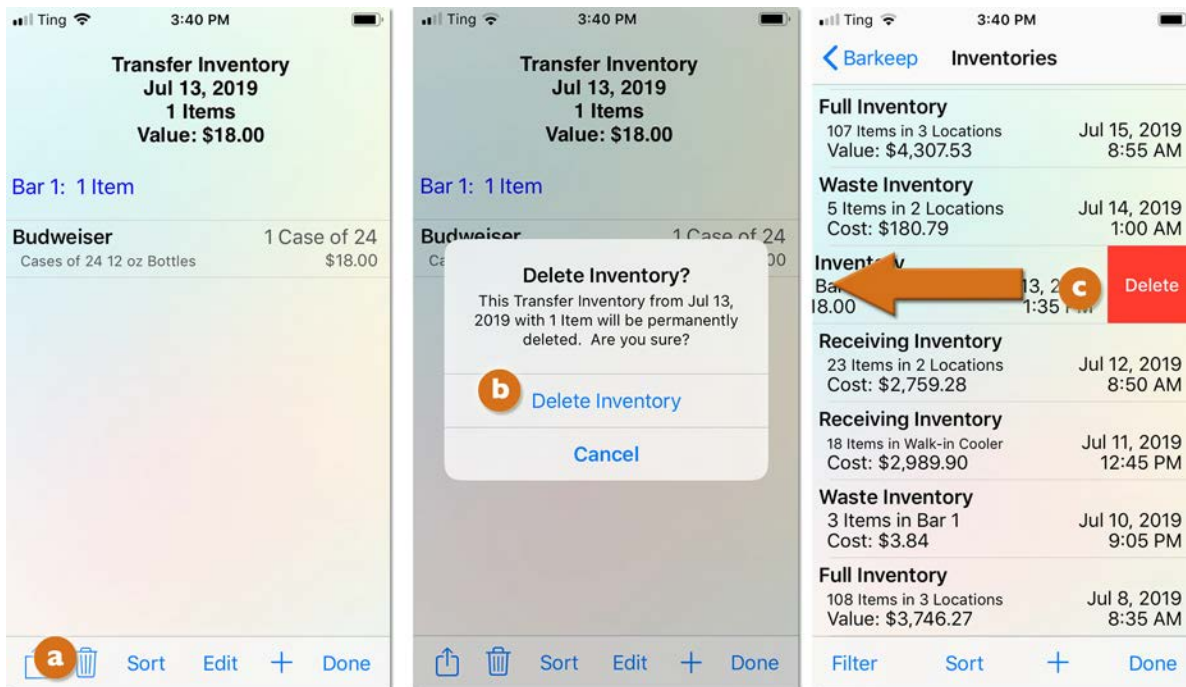
Note: Users registered with BarkeepOnline can take advantage of the Auto Delete feature that will automatically remove Inventories from your **iOS** Device(s) after 120 days from the Inventory Date. This prevents your Device from being filled with older Inventories. With a BarkeepOnline account, your older Inventories always remain available on our server, so there is no reason to keep the older Inventories on your Device.

Reports

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

1. Pressing the Reports ⓐ on the BarkeepApp Main Screen
   or
2. Pressing action ⬆️ icon ⓑ on the left side of the bottom toolbar for a particular Inventory.
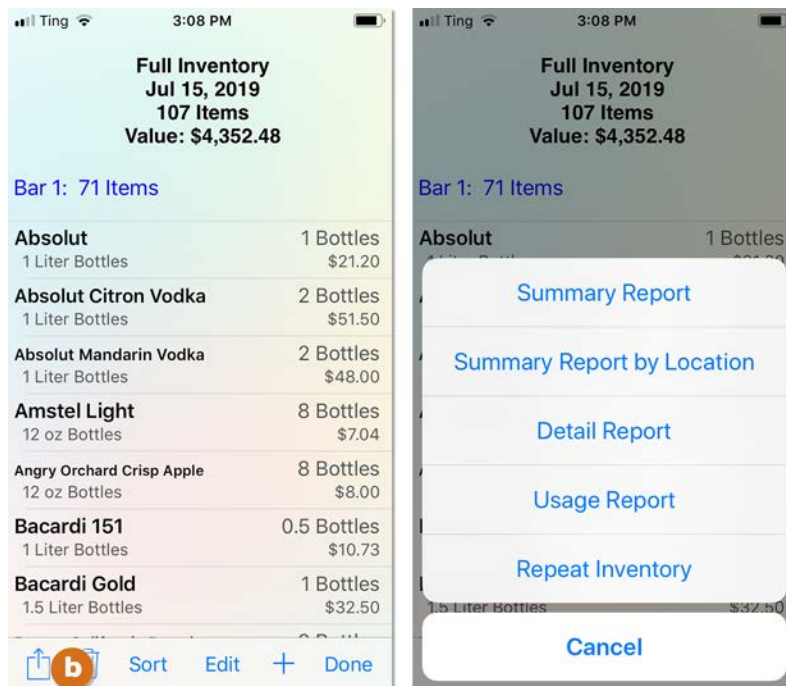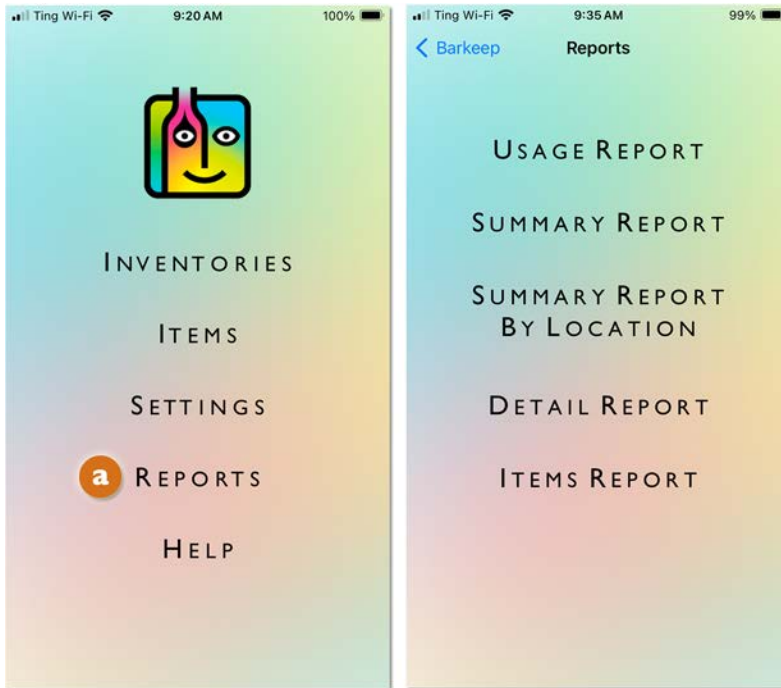
Report Settings

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

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

To configure any Report Settings for your **iOS** Device:
1. Select "Settings" **a** from the Main Screen.
2. Next select **Report Settings**. **b**
3. On the Report Settings screen and you will see the switch next to each option.
4. Switch 🟢 to the on position every option you would like to activate. **c**
5. Press **Save** on the bottom toolbar **d** to save your changes or select to **Cancel** discard them.
6. You can deactivate any of the options by following the same steps but moving the switch to the off position.
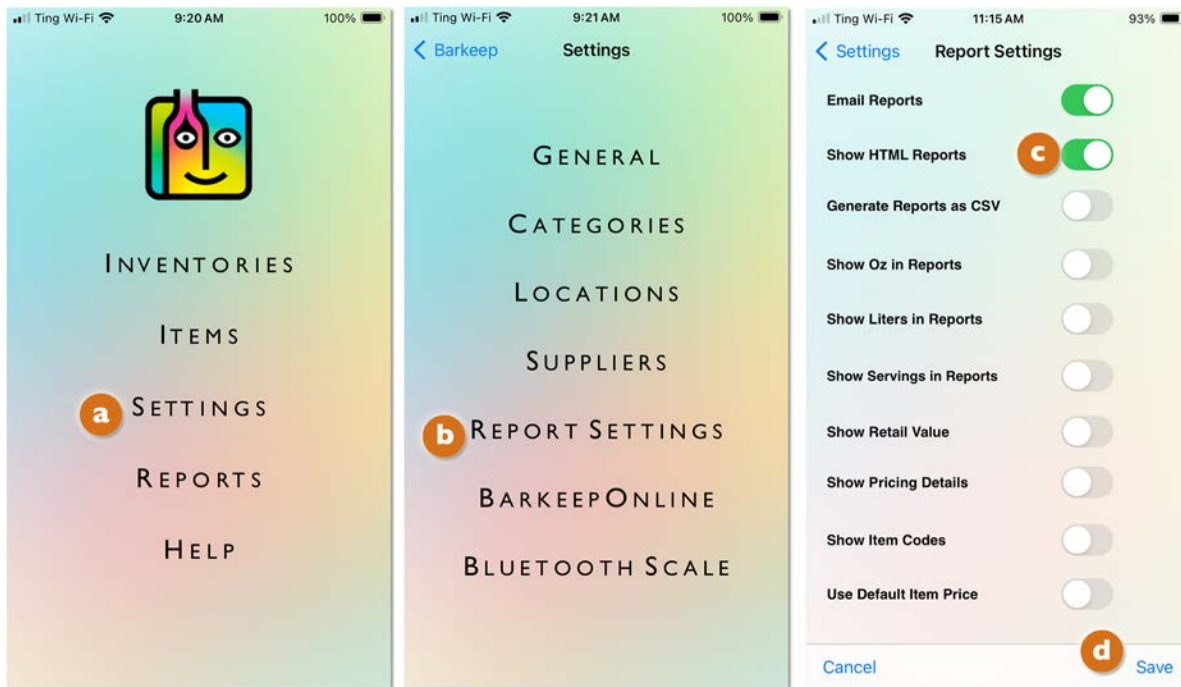
Below and on the following pages you'll find descriptions of the different General Settings.

Email Reports 🟢

When you run a report, BarkeepApp automatically creates an email.   The email includes an attached Excel spreadsheet version of the report. By default, the email is sent to the email address specified in your Account Settings.

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

Report Settings (cont.)

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

What happens if I do <u>not</u> email Reports?
If you turn off **Email Reports** (e) when you run a Report, Barkeep will not automatically generate an email.
Instead you will see a screen with downloading/sharing options such as using AirDrop (f) or adding the
Report to iCloud. (g)

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

Generate Reports as CSV 🔘

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

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

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

Report Settings (cont.)

Show HTML Reports ⬤

When you select <u>both</u> the option to **Show HTML Reports** Ⓐ and **Email Reports** then run a Report, the email will contain both an HTML version of the report, which is embedded in the text of the email, Ⓑ and an attached Excel spreadsheet version of the report.
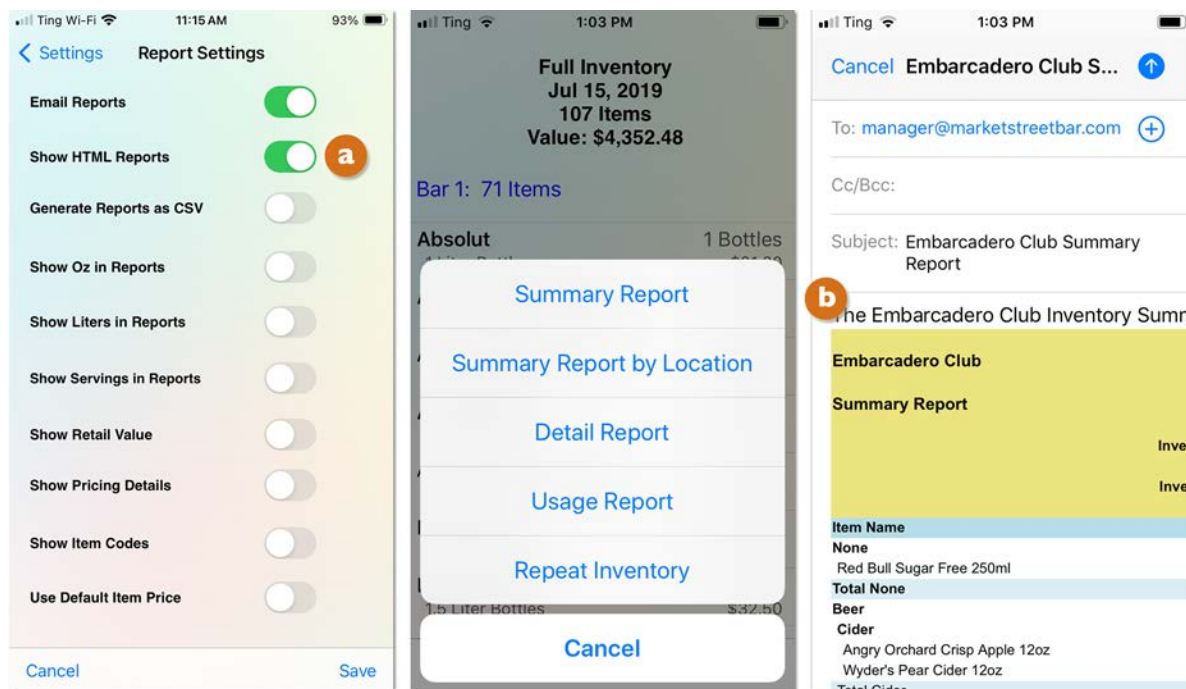
Note: if you select the option to **Show HTML Reports** but do <u>not</u> select **Email Reports**, Barkeep will not automatically generate an email. Instead you will see a screen with downloading/sharing options such as using AirDrop or adding the Report to iCloud. You will only see the Report in Excel spreadsheet format.

Usage Report Options ⬤

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

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

See the **Usage Report Section** for details on using all these options to manage the data included in your Usage Reports. Also see the **Pricing Items in Inventories** section for additional information about the **Use Default Item Price** setting.

Item Codes in Detail Report ⬤

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

Usage Report

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

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

The example below shows the first page of the Usage Report for usage between two Inventories taken on June 24th and July 1st.   The Inventories contain Items from Categories including, **Domestic Bottled Beer**, **Domestic Draft Beer**, **Imported Draft Beer**, etc.

Castro Bar						Generated by BarkeepApp
Inventory Usage Report						July 1, 2019 04:03PM

Starting Inventory	June 24, 2019 10:30AM	
Ending Inventory	July 1, 2019 10:30AM	
Report Locations	All Locations	

Item Name	Item Price	Start	Received	End	Used		Cost
Beer							
Domestic Bottled Beer							
Amstel Light 12oz	$ 0.88	60	0	36	24	$	21.00
Anchor Steam Beer 12oz	$ 1.10	0	240	0	240	$	264.00
Bud Light 12oz	$ 0.75	98	240	70	268	$	201.00
Budweiser 12oz	$ 0.85	28	480	20	488	$	414.80
Miller Genuine Draft 12oz	$ 0.78	79	192	129	142	$	110.76
Miller Lite 12oz	$ 0.78	133	48	132	49	$	38.22
Rolling Rock 12oz	$ 0.75	9	72	18	63	$	47.25
Total Domestic Bottled Beer		407	1,272	405.0	1,274.0	$	1,097.03
Domestic Draft Beer							
Budweiser Keg 15.5gal	$ 92.00	1.6	0	1.5	0.1	$	9.20
Miller Genuine Draft Keg 15.5gal	$ 89.00	0	2	0	2	$	178.00
Miller Lite Keg 15.5gal	$ 89.00	1.5	60	3	58.5	$	5,206.50
Pabst Blue Ribbon Keg 15.5gal	$ 75.00	0	4	0	4	$	300.00
Total Domestic Draft Beer		3.1	66	4.5	64.6	$	5,693.70
Imported Bottled Beer							
Becks 12oz	$ 1.05	54	0	16	38	$	39.82
Corona Extra 12oz	$ 1.10	79	144	172	51	$	56.10
Guinness Draught Singles 11.20 Oz Bottle 11.2oz	$ 1.20	0	24	0	24	$	28.80
Heineken 12oz	$ 1.23	58	96	108	46	$	56.54
Pacifico 12oz	$ 0.96	27	12	31	8	$	7.68

Usage Report (cont.)

To generate a Usage Report:
1. Go to the Main Screen and select **Reports**. **a**
2. Then select **Usage Report**. **b**
3. This will take you to a settings screen specific for the new Usage Report.
4. The first step you will need to take is to press **Choose** **c** and select a Starting Inventory for your Usage Report.
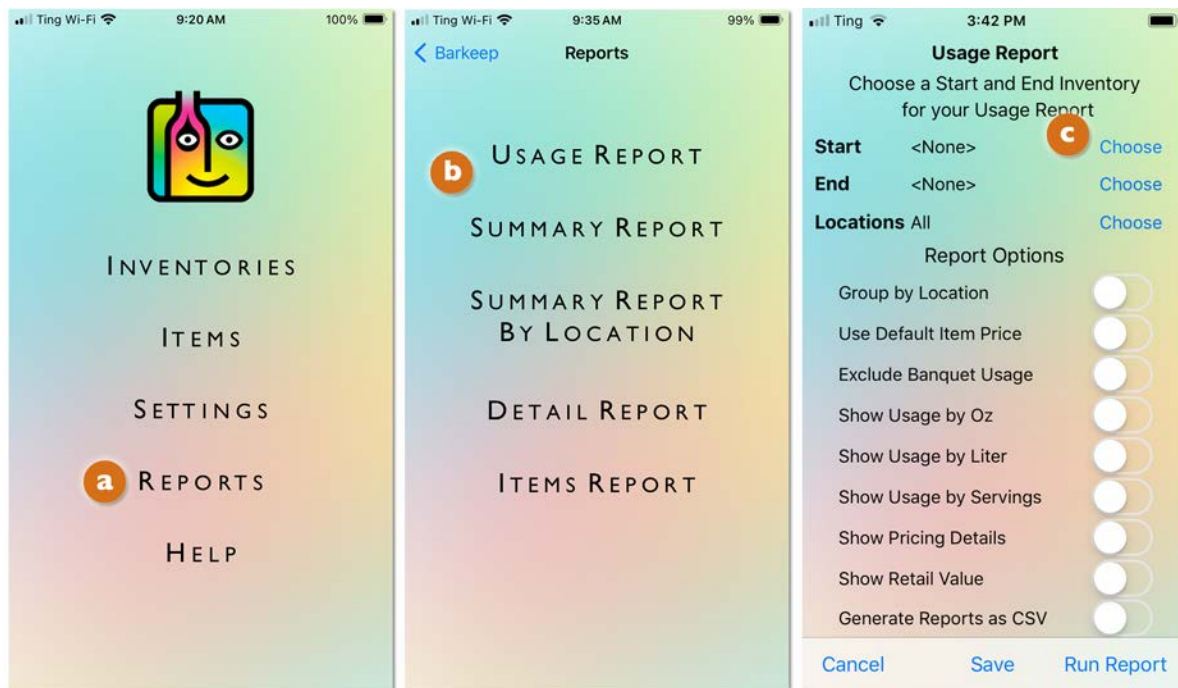
Note: You can also generate a Usage Report directly from an Inventory.

Usage Report (cont.)

5. After you press **Choose**, you will see a list of Full Inventories. Press on the Inventory you would like to select. In this example choose the June 24th Full Inventory as the Starting Inventory. **d**

6. Barkeep will return you to the screen where you now repeat the steps to press **Choose**, this time for an Ending Inventory. **e**

7. This takes you to a list of Full Inventories that were taken <u>after</u> the June 24th Starting Inventory. The Ending Inventory can be chosen from this list. **f** Select the July 1st Inventory as the Ending Inventory.

8. You will now see the selected Starting and Ending Inventories. Re-press **Choose** if you wish to change your selections.
    Note: If you are running multiple Usage Reports be sure to double-check that you have selected the correct Starting and Ending Inventories before you press **Run Report**.
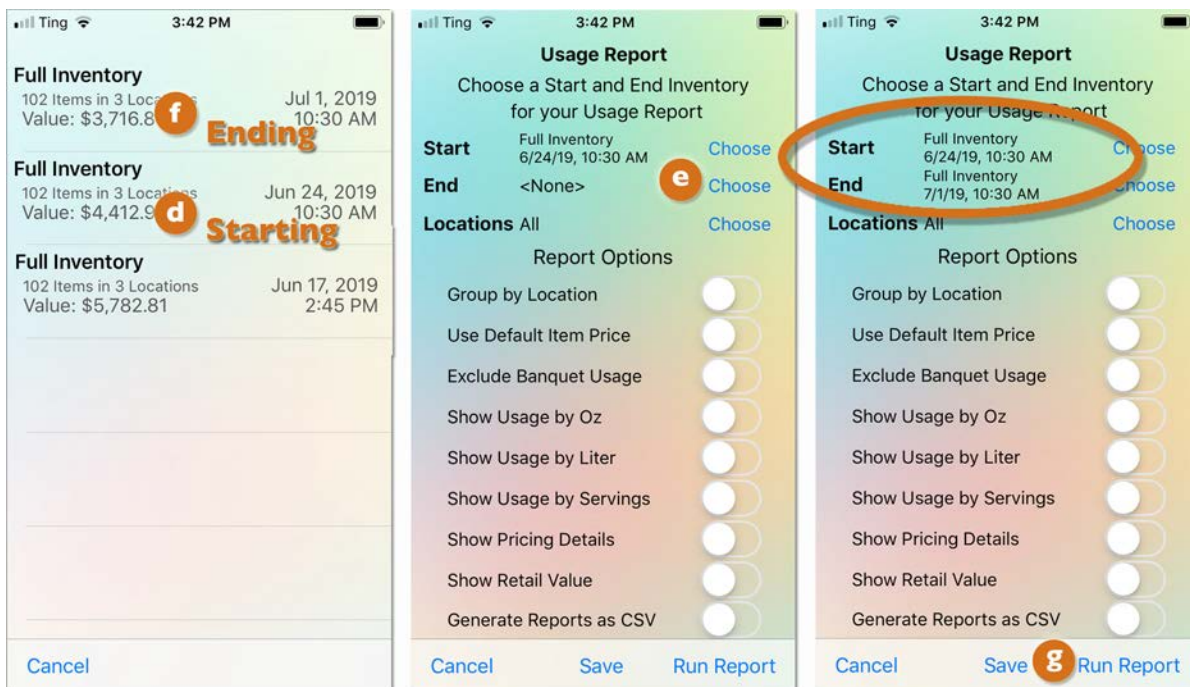
9. Once you have chosen a Starting and Ending Inventory you are ready to run a Usage Report.

10. When you press **Run Report** on the bottom toolbar, **g** Barkeep automatically generates the report.

11. Depending on your Report Settings, Barkeep will:
    o Create an email containing an Excel[*] spreadsheet version of the report attached to the email.
    o Create an email containing both an HTML version of the report embedded in the text of the email, and an Excel spreadsheet.
    o Create an Excel spreadsheet version of the report to be downloaded/shared.

12. The final step is to send the email to deliver the Report or download/share options using AirDrop or iCloud.

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[*] a CSV version if you have selected that option.

Usage Report (cont.)

Locations

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

To choose specific Locations take the following steps before running your Usage Report:
1. Press **Choose** if you wish to filter your report by Location(s). **a**
2. Press the Location(s) you wish to use for your Usage Report. **b** If you make a mistake, simply press the checked Location(s) to unselect it.
3. Press **Save** on the bottom toolbar **c** to save your changes or select to **Cancel** discard them.
4. Now you are ready to press **Run Report** on the bottom toolbar and follow the steps on the previous page.
5. When you select the option to **Group by Location** **d** the Usage Report will also be broken down by your Locations. For additional Report Options, continue to the **next page**.
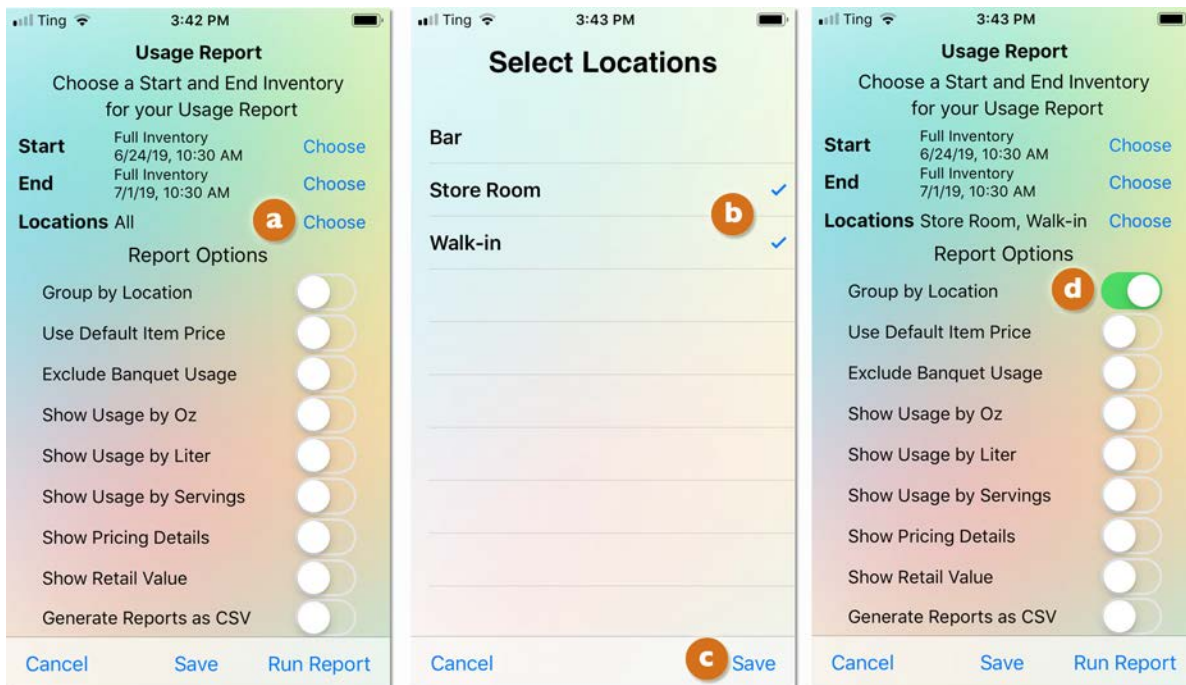
Usage Report (cont.)

Usage Report Options

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

1. On the Usage Report screen and you will see the switch next to each option (scroll down for the complete list).
2. Switch ⬤ to the on position every option you would like to activate before you press **Run Report**.
3. Before you press **Run Report**, you can deactivate any of the options by moving the switch to the off position.
4. What happens to my choices after I run a Usage Report?
   - ✓ The options you have activated will remain on for future Usage Reports.
   - ✓ You can simply turn them off the next time your run a Usage Report if you prefer.
   - ✓ Note that the choices you make will match the choices in Report Settings and vice versa.
5. **Note:** The options **Generate Reports as CSV**, **Email Reports** and **Generate HTML** will be applied to all the Reports you can run with Barkeep.
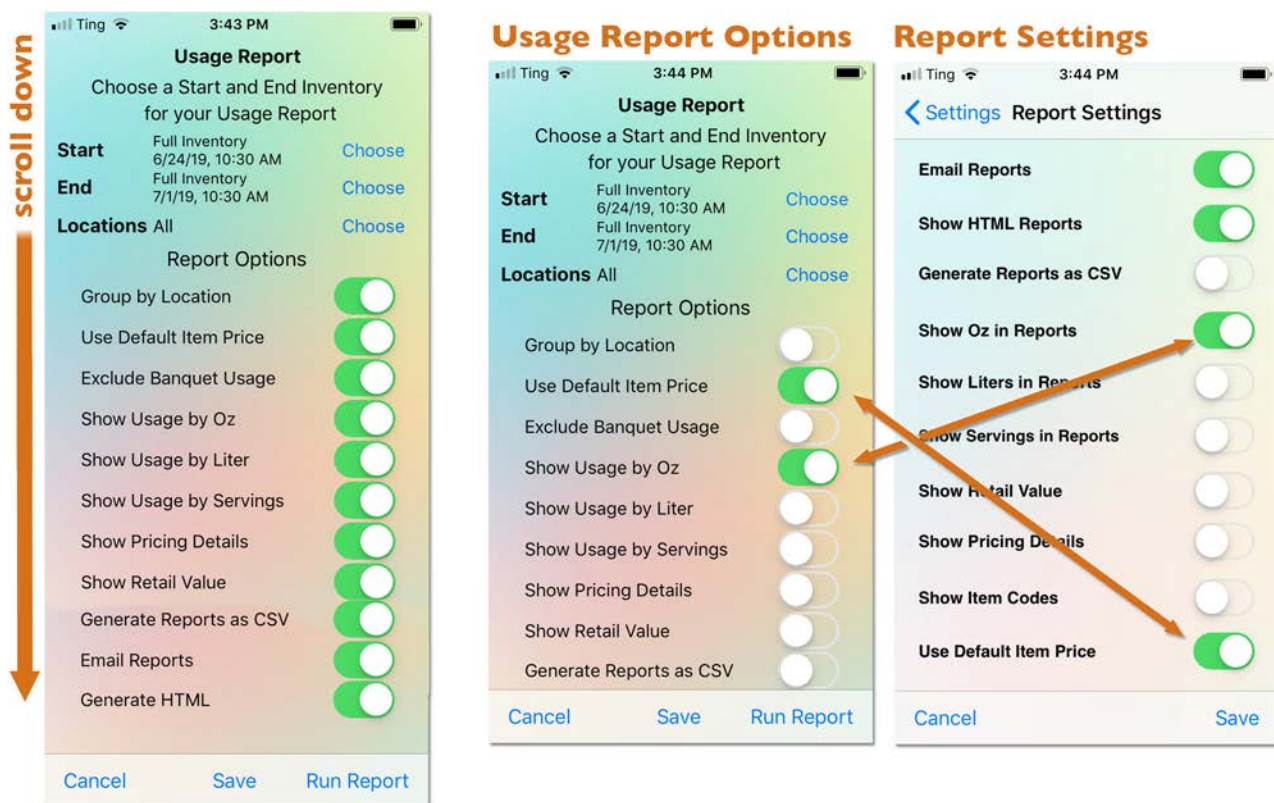
Reminder: The choices you make for Usage Report options are unique to BarkeepApp on the **iOS** Device you are using. You may select different options in BarkeepOnline, or additional Devices registered to the same account.

Usage Report Options (cont.)

Below are explanations of the different Usage Report options.

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

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

Real Cost Report Method – Barkeep calculates the cost of Items that are used based on the price that you actually paid for the Items in your Inventory. Barkeep calculates this using the prices that you set for each Item in your Receiving and Return inventories.
The costs match the default Item Price unless they reflect discounts or price increases.
To calculate the cost of your liquor usage using this method, Barkeep uses a *First-In First-Out* (FIFO) algorithm, which means that Barkeep always assumes that the oldest liquor in your Inventory is used first. For example, if you received a bottle of **Absolut** for $20 on May 7th and another bottle for $22 on May 18th, the $20 bottle received on May 7th will be used before the $22 bottle received on May 18th.

Default Item Price Method – If you switch on "Use Default Item Price," Barkeep will calculate your Usage Report costs based on the default prices you have set for each Item.
The default Item Price will be used for each Item in your Usage Report even when you have paid a different price for any Items. For example, if you were conducting a Receiving Inventory after a Supplier delivery and your Supplier charged you $22 per bottle instead of the default Item Price of $20. The Usage Report will base the calculations on the $20 price when you switch on "Use Default Item Price."
Also see the **Pricing Items in Inventories** section for overriding the default Item Price in a Receiving Inventory.

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

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

Usage Report Options (cont.)

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

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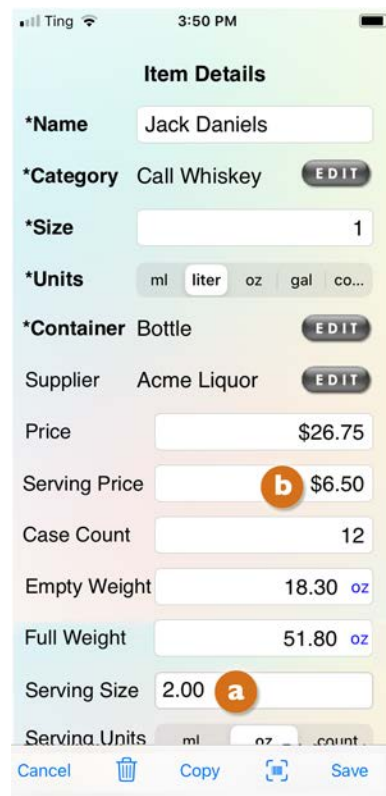
Show Usage by Liter ⬤
When you select to **Show Usage by Liter** you will have an additional column of data that will show the total ounces of each Item used. For example, if you used 4.5 one-liter bottles of **Jack Daniels** you will also see that you used 4.5 liters.

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

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

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

Generate Reports as CSV ⬤ **Email Reports** ⬤ and **Generate HTML** ⬤
When you select to turn these options on or off it will also be the optional setting for all your reports. You can also manage these options under Report Settings.

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

Usage Reports directly from the Inventory[15]

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

1. Select the Action ⬆ icon **a** on the left-hand side of the bottom toolbar.
2. Choose Usage Report **b** from the action menu.
3. This will take you to a settings screen specific for this Usage Report. The Inventory that you are creating a Usage Report from will automatically be your Ending Inventory. Note that this Inventory already appears as the selection for the Ending Inventory.
4. The next step you will need to take is to press **Choose** **c** and select a Starting Inventory for your Usage Report.
5. Next you can choose any of the Report Options **d** explained on the previous pages.
6. When you press **Run Report** on the bottom toolbar, **e** Barkeep automatically generates the report.
7. Depending on your Report Settings, Barkeep will:
   o Create an email containing an Excel spreadsheet version of the report attached to the email.
   o Create an email containing both an HTML version of the report embedded in the text of the email, and an Excel spreadsheet.
   o Create an Excel spreadsheet version of the report to be downloaded/shared.
8. The final step is to send the email to deliver the Report or download/share options using AirDrop or iCloud.
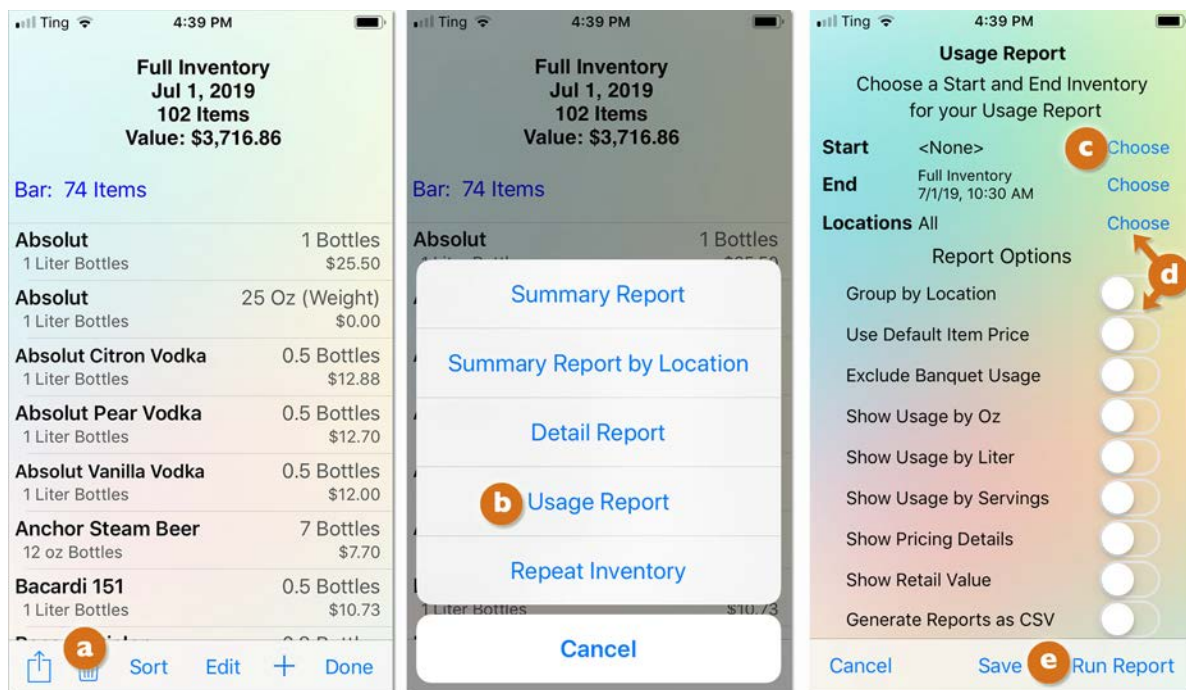
Usage Reports and Pour Cost

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

You can calculate your Pour Cost manually using the Usage Report to determine your liquor costs.

Or you can subscribe to BarkeepOnline to receive complete Pour Cost Analysis, Sales Tracking, and Order Management. If you subscribe to BarkeepOnline, all of your Inventory data from BarkeepApp will automatically be uploaded to BarkeepOnline for analysis.

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

Negative Usage

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

Negative usage is shown in red like in the example below. In this example, the end count has more bottles of **Becks** on July 1st than the start count on June 24th. When this happens, review the two Inventories. Were bottles undercounted on June 24th or was there a mistake on July 1st? Or, perhaps you received **Becks** but did not add the Item to a Receiving Inventory.

Castro Bar						Generated by BarkeepApp
						July 1, 2019 04:03PM

Inventory Usage Report

Starting Inventory	June 24, 2019 10:30AM
Ending Inventory	July 1, 2019 10:30AM
Report Locations	All Locations

Item Name	Item Price	Start	Received	End	Used	Cost
Beer						
Domestic Bottled Beer						
Amstel Light 12oz	$ 0.88	60	0	36	24	$ 21.00
Anchor Steam Beer 12oz	$ 1.10	24	240	38	226	$ 248.60
Bud Light 12oz	$ 0.75	98	240	118	220	$ 165.00
Budweiser 12oz	$ 0.85	28	480	68	440	$ 374.00
Miller Genuine Draft 12oz	$ 0.78	79	192	129	142	$ 110.76
Miller Lite 12oz	$ 0.78	133	48	132	49	$ 38.22
Rolling Rock 12oz	$ 0.75	9	72	18	63	$ 47.25
Total Domestic Bottled Beer		431	1,272	539.0	1,164.0	$ 1,004.83
Domestic Draft Beer						
Budweiser Keg 15.5gal	$ 92.00	1.6	0	1.5	0.1	$ 9.20
Miller Genuine Draft Keg 15.5gal	$ 89.00	0.8	2	0.9	2.0	$ 173.55
Miller Lite Keg 15.5gal	$ 89.00	1.5	5	3	3.5	$ 311.50
Pabst Blue Ribbon Keg 15.5gal	$ 75.00	0	4	3.8	0.2	$ 15.00
Total Domestic Draft Beer		3.9	11	9.2	5.8	$ 509.25
Imported Bottled Beer						
Becks 12oz	$ 1.05	54	0	136	-82	$ (85.93)
Corona Extra 12oz	$ 1.10	79	144	172	51	$ 56.10
Guinness Draught Singles 11.20 Oz Bottle 11.2oz	$ 1.20	0	24	5	19	$ 22.80
Heineken 12oz	$ 1.23	58	96	108	46	$ 56.54
Pacifico 12oz	$ 0.96	27	12	31	8	$ 7.68
Stella Artois 12oz	$ 1.23	20	24	22	22	$ 27.06
Total Imported Bottled Beer		238	300	474.0	64.0	$ 84.25

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

- **Negative Usage**
- **Price Increases**

Negative Usage (cont.)

Do Empties affect Negative Usage?

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

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

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

Summary Report

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

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

The sample Summary Report[16] shows the summary of all Items included in the July 1st Full Inventory.

Castro Bar			Generated by BarkeepApp July 2, 2019 03:49PM		
Summary Report					
Inventory Type	Full				
Inventory Date	July 1, 2019 10:30AM				

Item Name	Quantity	Oz	Price		Cost	
Beer						
Beer (non-alcoholic)						
Clausthaler N-A 12oz	5	60	$	0.90	$	4.50
Total Beer (non-alcoholic)	5.0	60.0			$	4.50
Cider						
Bottled Cider						
Wyder's Pear Cider 12oz	9	108	$	2.85	$	25.65
Total Bottled Cider	9.0	108.0			$	25.65
Total Cider	9.0	108.0			$	25.65
Domestic Bottled Beer						
Amstel Light 12oz	24	288	$	0.88	$	21.00
Anchor Steam Beer 12oz	19	228	$	1.10	$	20.90
Bud Light 12oz	38	456	$	0.75	$	28.50
Budweiser 12oz	72	864	$	0.75	$	54.00
Michelob Ultra 12oz	5	60	$	0.80	$	4.00
Miller Lite 12oz	24	288	$	0.78	$	18.72
Rolling Rock 12oz	24	288	$	0.75	$	18.00
Sierra Nevada Big Foot Ale Singles 12oz	16	192	$	98.00	$	1,568.00
Total Domestic Bottled Beer	222.0	2,664.0			$	1,733.12
Domestic Draft Beer						
Budweiser Keg 15.5gal	1	1984	$	95.00	$	95.00
Miller Genuine Draft Keg 15.5gal	0.4	793.6	$	89.00	$	35.60
Miller Lite Keg 15.5gal	1	1984	$	89.00	$	89.00
Pabst Blue Ribbon Keg 15.5gal	0.6	1,190.4	$	75.00	$	45.00
Sierra Nevada Keg 15.5gal	0.6	1,190.4	$	185.00	$	111.00
Total Domestic Draft Beer	3.6	7,142.4			$	375.60
Imported Bottled Beer						
Corona Extra 12oz	24	288	$	1.10	$	26.40
Heineken 12oz	21	252	$	1.24	$	25.99
Pacifico 12oz	26	312	$	1.02	$	26.54
Stella Artois 12oz	36	432	$	1.23	$	44.28
Total Imported Bottled Beer	107.0	1,284.0			$	123.21

---

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

Summary Report (cont.)

To create a Summary Report, do the following steps:
1. Go to the Main Screen and select Reports. Then select **Summary Report**. **a**
2. Or, if you prefer a Summary Report separated into subtotals by all Locations, select **Summary Report By Location**. **b**
3. You are presented with a list of Inventories to choose from. Choose the Inventory that you would like to run a Summary Report on. **c** In this example, choose the August 12th Full Inventory.
4. BarkeepApp will run the report and create an email with an HTML version of the report included in the text of the email and an Excel Spreadsheet version of the report attached to the email.
5. When you press **Done** on the bottom toolbar, **d** Barkeep automatically generates the report.
6. Depending on your Report Settings, Barkeep will:
   o Create an email containing an Excel spreadsheet version of the report attached to the email.
   o Create an email containing both an HTML version of the report embedded in the text of the email, and an Excel spreadsheet.
   o Create an Excel spreadsheet version of the report to be downloaded/shared.
7. The final step is to send the email to deliver the Report or download/share options using AirDrop or iCloud.
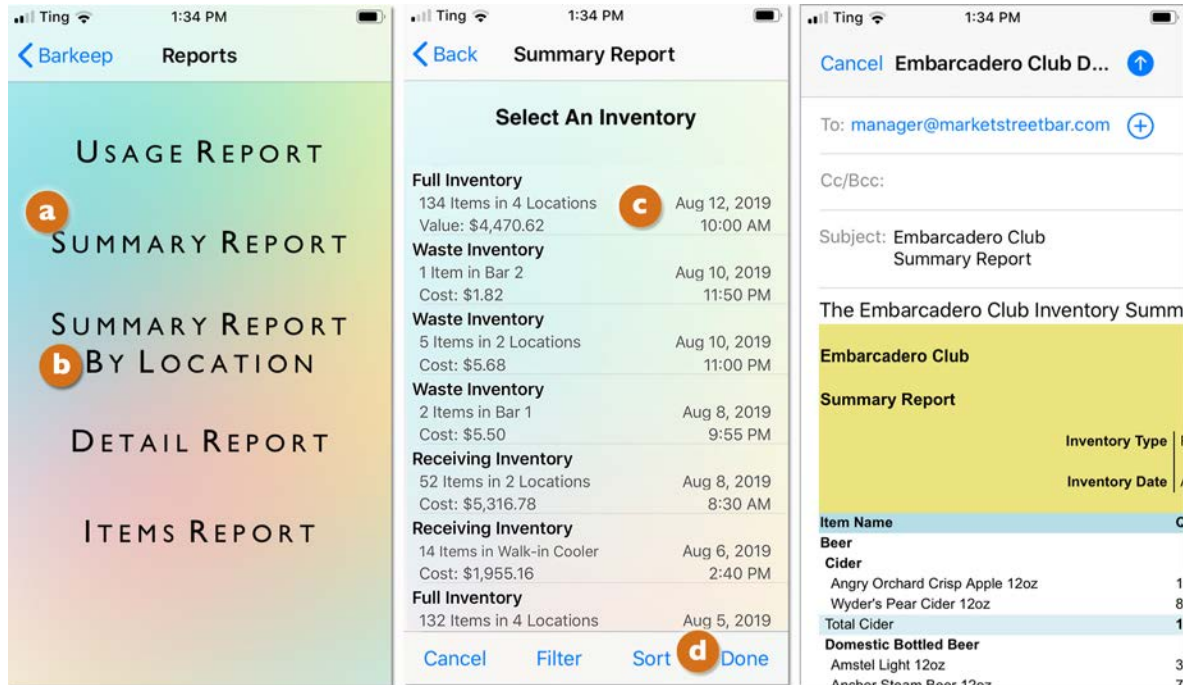
Summary Report (cont.)
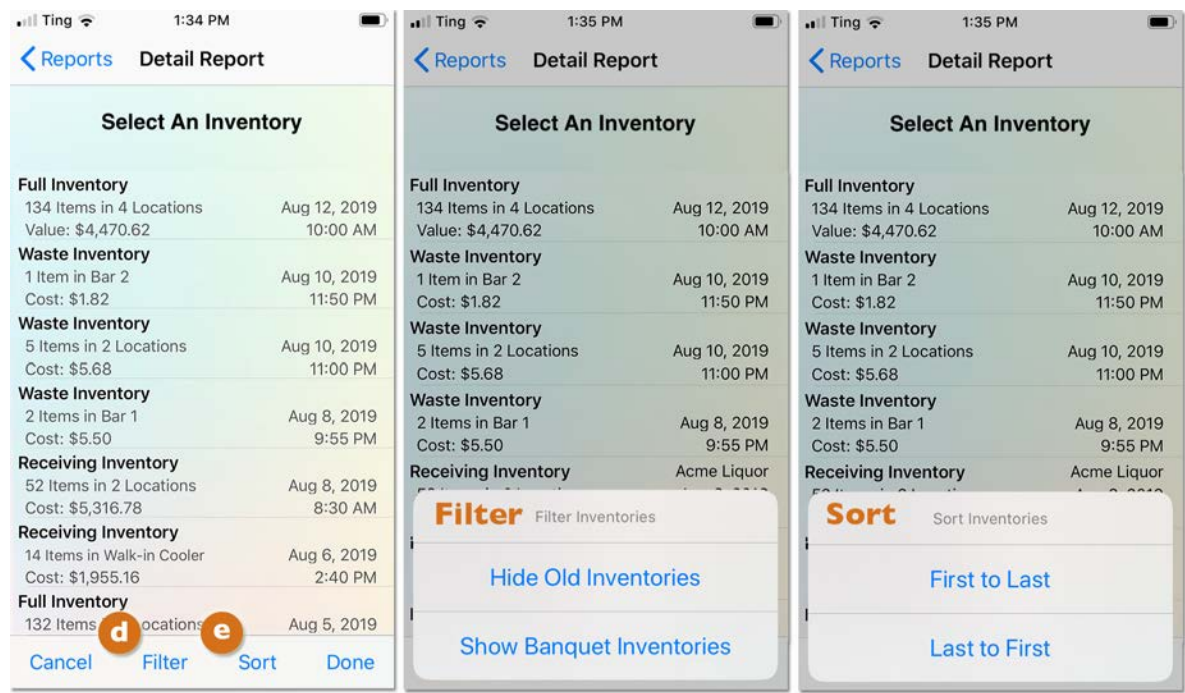
Filter and Sort
When selecting an Inventory, you can first choose to **Filter** **d** the Inventories list if you want to select an older Inventory and/or a Banquet Inventory and you can also **Sort** **e** the order of the list.

Summary Report directly from the Inventory

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

1. Select the Action ⬆ icon **a** on the left-hand side of the bottom toolbar.
2. Choose **b** Summary Report from the action menu.
3. Or, in this example, because you prefer a Summary Report separated into subtotals by all Locations, select Summary Report By Location. **c**
4. Depending on your Report Settings, Barkeep automatically generates the Summary Report creating an Excel spreadsheet version attached to an email with an optional HTML version of the report.
5. Email the report **d** or download/share the report per your Report Settings.
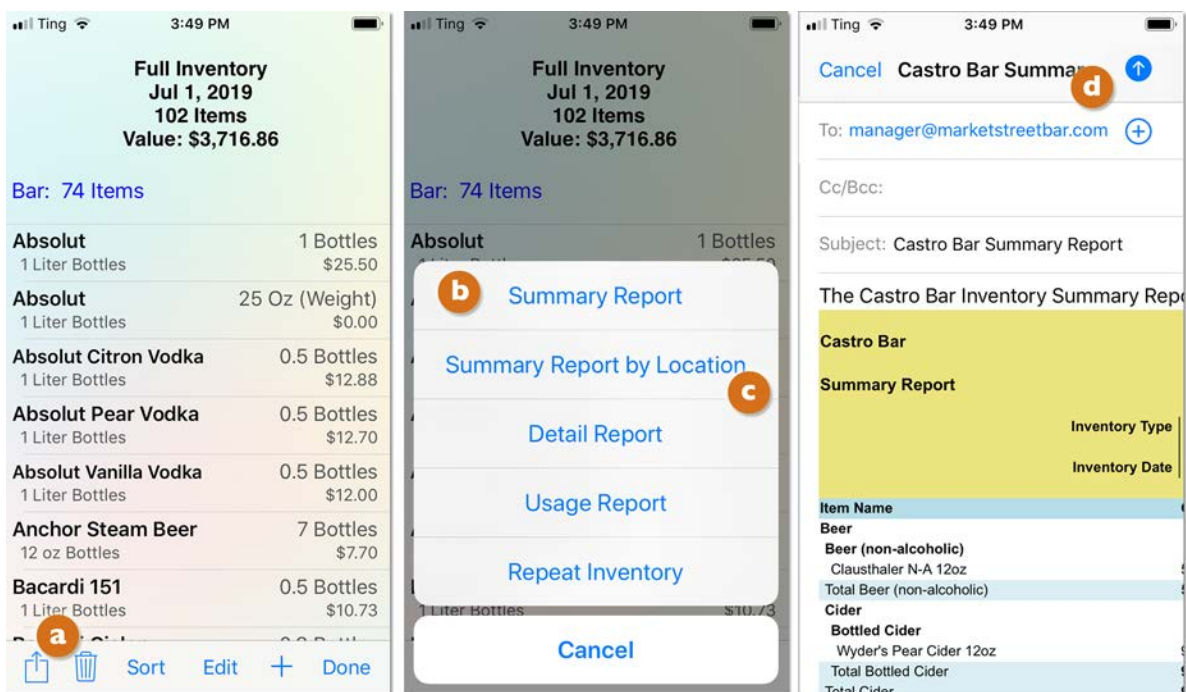
Detail Report

The Detail Report contains a line for each time that an Item was added to an Inventory. For example, if you've added an Item (e.g. **Bud Light**) to an Inventory multiple times, there will be multiple lines in the report for each time that the Item was added to the Inventory. Items are not subtotaled for you. This gives you a report with the "raw data" for a given Inventory, which you can review to suit your needs.

The sample shows the beginning of a multi-page Detail Report with the data from a Full Inventory.

Embarcadero Club

Generated by BarkeepApp
July 28, 2019 03:46PM

Detail Report

Inventory Type	Full
Inventory Date	July 22, 2019 11:59AM

Location	Item Name	Category	Quantity	Units
Walk-in Cooler	Amstel Light 12oz	Domestic Bottled Beer	1	Case of 24
Walk-in Cooler	Bud Light 12oz	Domestic Bottled Beer	2	Cases of 24
Walk-in Cooler	Miller Genuine Draft 12oz	Domestic Bottled Beer	4	Cases of 24
Walk-in Cooler	Miller Lite 12oz	Domestic Bottled Beer	5	Cases of 24
Walk-in Cooler	Budweiser Keg 15.5gal	Domestic Draft Beer	1	Kegs
Walk-in Cooler	Miller Lite Keg 15.5gal	Domestic Draft Beer	2	Kegs
Walk-in Cooler	Corona Extra 12oz	Imported Bottled Beer	6	Cases of 24
Walk-in Cooler	Heineken 12oz	Imported Bottled Beer	4	Cases of 24
Walk-in Cooler	Guinness Keg 13.2gal	Premium Draft Beer	2	Kegs
Stock Room	Beefeater Dry Gin 1L	Call Liquor	10	Bottles
Stock Room	Bailey's Irish Cream 1L	Call Liquor	5	Bottles
Stock Room	Bombay Dry Gin 1L	Call Liquor	6	Bottles
Stock Room	Captain Morgan Spiced Rum 1L	Call Liquor	5	Bottles
Stock Room	Dubonnet Red 1L	Call Liquor	5	Bottles
Stock Room	Dubonnet White 1L	Call Liquor	8	Bottles
Stock Room	J & B Scotch 1L	Call Liquor	8	Bottles
Stock Room	Jack Daniels 1L	Call Liquor	1	Case of 12
Stock Room	Jagermeister 1L	Call Liquor	1	Case of 12
Stock Room	Kahlua 1L	Call Liquor	1	Case of 12
Stock Room	Myers Dark Rum 1L	Call Liquor	8	Bottles
Stock Room	Seagram's 7 Crown 1L	Call Liquor	9	Bottles
Stock Room	Smirnoff Vodka 1L	Well Liquor	10	Bottles
Stock Room	Southern Comfort 1L	Call Liquor	11	Bottles
Stock Room	Wild Turkey 101 1L	Call Liquor	10	Bottles
Stock Room	Grey Goose Vodka 750ml	Call Vodka	8	Bottles
Bar 2	Johnnie Walker Black 1L	Premium Liquor	9	Bottles
Stock Room	Red Bull 250ml	Non-Alcoholic	3	Cases of 24
Stock Room	Red Bull Sugar Free 250ml	Non-Alcoholic	5	Cases of 24
Bar 1	Amstel Light 12oz	Domestic Bottled Beer	12	Bottles
Bar 1	Bud Light 12oz	Domestic Bottled Beer	20	Bottles
Bar 1	Budweiser 12oz	Domestic Bottled Beer	14	Bottles
Bar 1	Miller Genuine Draft 12oz	Domestic Bottled Beer	16	Bottles
Bar 1	Rolling Rock 12oz	Domestic Bottled Beer	18	Bottles
Bar 1	Miller Lite 12oz	Domestic Bottled Beer	12	Bottles

Detail Report (cont.)

To generate a Detail Report, do the following steps:

1. Select Detail Report from the Reports screen. **a**
2. This will show you a list of your existing Inventories.
3. Choose the Inventory that you would like to generate a report for, in this example **b** choose the August 12th Full Inventory.
4. Depending on your Report Settings, Barkeep will:
     o Create an email containing an Excel[17] spreadsheet version of the report attached to the email.
     o Create an email containing both an HTML version of the report embedded in the text of the email, and an Excel spreadsheet.
     o Create an Excel spreadsheet version of the report to be downloaded/shared.
5. The final step is to send the email **c** to deliver the Report or download/share options using AirDrop or iCloud.
6. BarkeepApp will run the report and automatically create an email with an HTML version of the report embedded in the email and an Excel spreadsheet version of the report attached to the email.
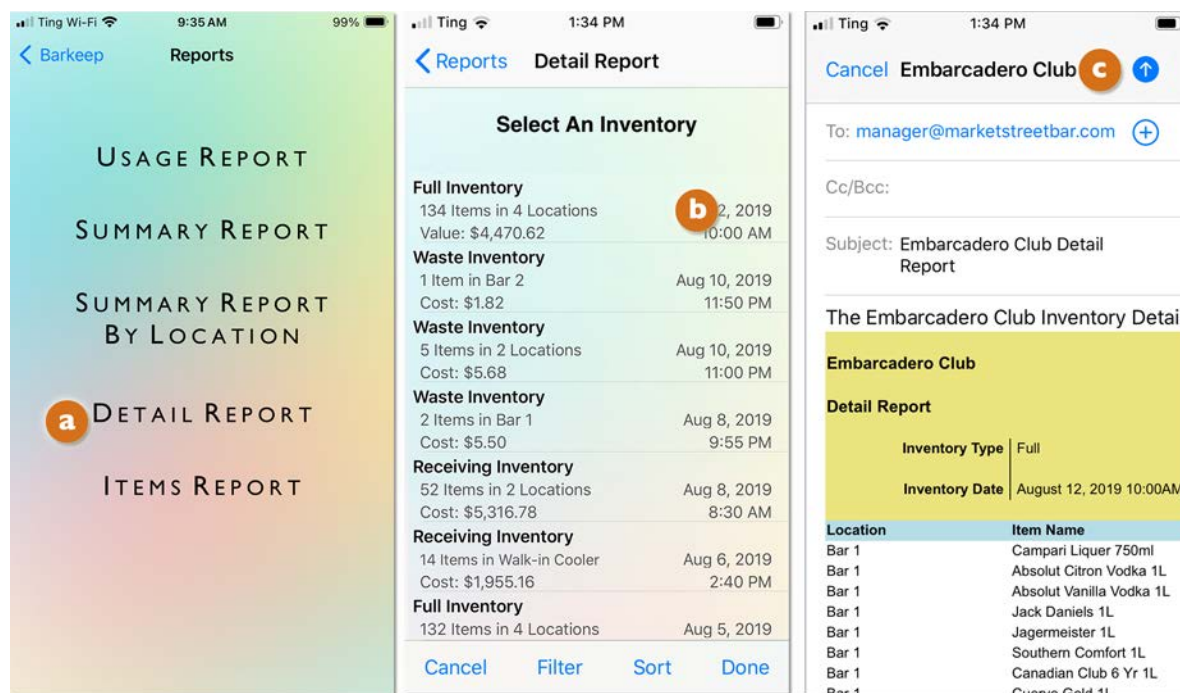
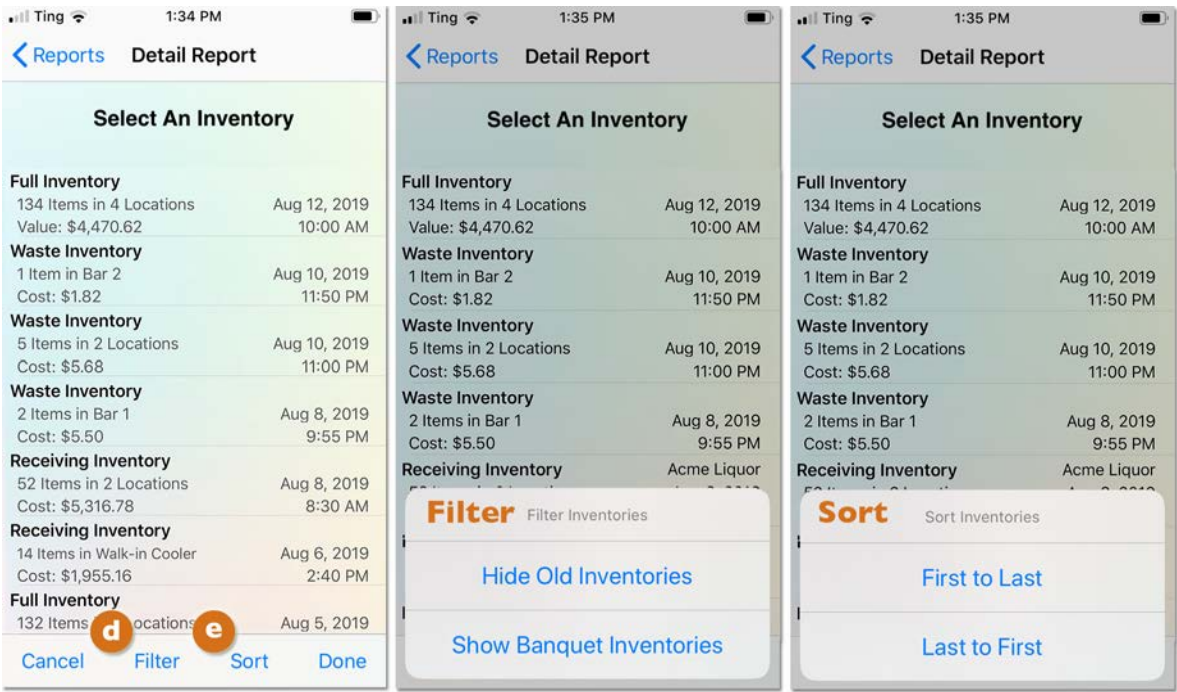[17] a CSV version if you have selected that option.

Detail Report (cont.)

Filter and Sort

When selecting an Inventory, you can first choose to **Filter** **d** the Inventories list if you want to select an older Inventory and/or a Banquet Inventory and you can also **Sort** **e** the order of the list.
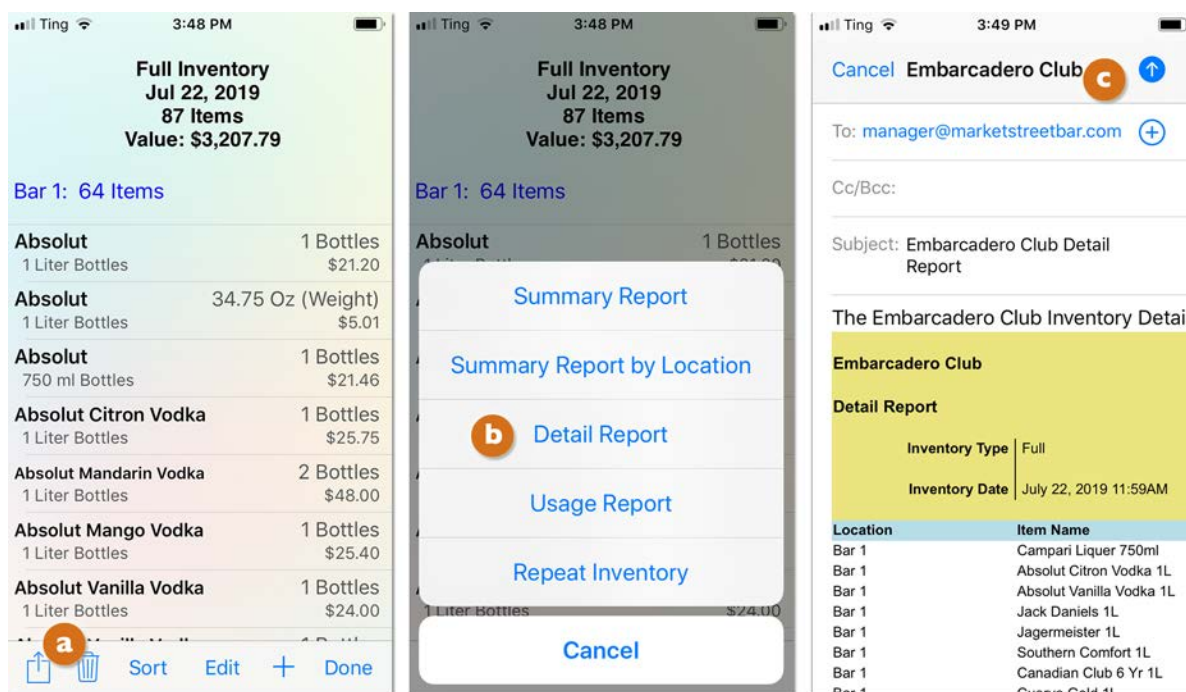
Detail Report (cont.)

Directly from the Inventory

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

1. Select the action ⬆️ icon **a** on the left-hand side of the bottom toolbar.
2. Choose **b** Detail Report from the action menu.
3. This automatically generates the Detail Report and creates an email containing both an HTML version of the report embedded in the text of the email, and an Excel spreadsheet version of the report attached to the email.
4. Depending on your Report Settings, Barkeep automatically generates the Summary Report creating an Excel spreadsheet version attached to an email with an optional HTML version of the report.
5. Email the report **c** or download/share the report per your Report Settings.

Detail Report (cont.)

Item Codes in Detail Reports

When you run **a** a Detail Report you have the option to include the Item Codes. Be sure to switch **Item Codes in Detail Report** **b** on in the Report Settings.
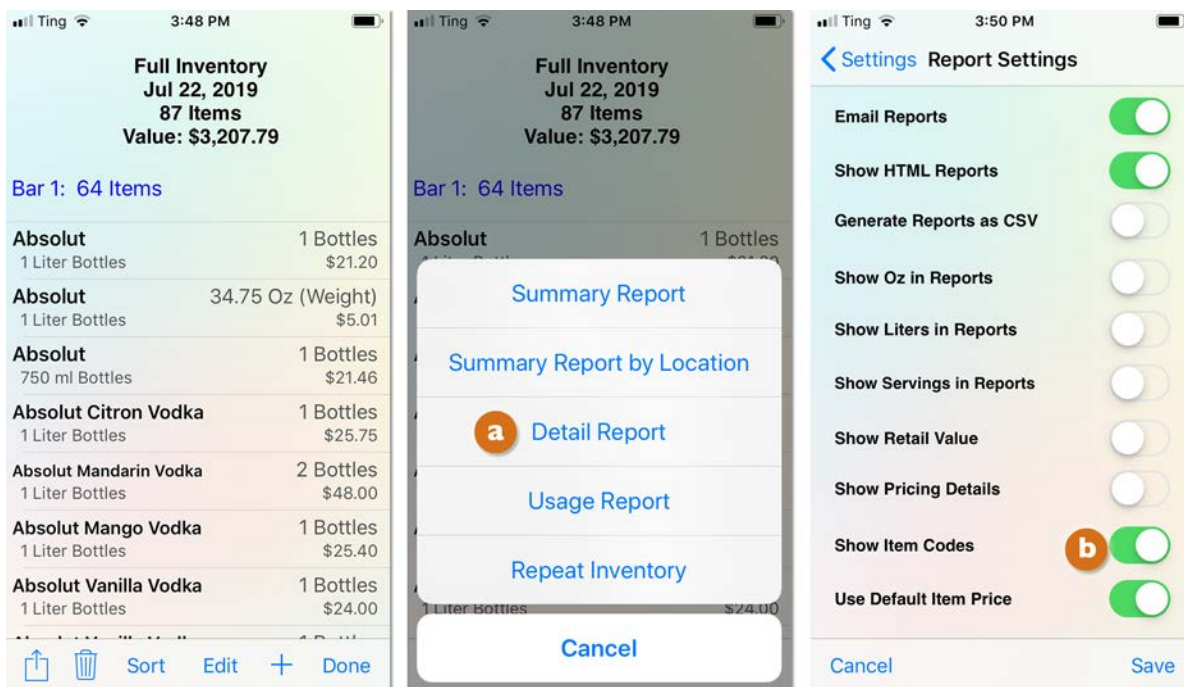
The example below shows a Detail Report for a Receiving Inventory that includes the Item Codes. **c** In this example, a user might want to compare a Detail Report to information on a Supplier's invoice.

Pour Cost Analysis

The reason behind using a Liquor Inventory Tracking system like Barkeep is to make sure that you aren't losing product either through theft, over-pouring, charging the wrong price, or other common problems.

The key to tracking your Liquor Usage is to understand your Pour Cost. Industry standard Pour Cost is in the 18-24% range, although this can vary based on many factors, including obviously the price that you charge for a particular drink, the price you pay for your product, the mix of well versus call versus premium sales, etc.

Getting a handle on your Pour Cost is an essential first step in identifying and solving any possible problems.

The starting point is to determine your alcohol usage over time and compare it to your sales. This will give you your gross Pour Cost. From there, you can decide whether or not it's worth looking at more details. If your Pour Cost is relatively low, below 20%, then you're doing really well and may not need to track it any more closely. However, if you're running in the 22%**+** range, then it's probably worth some time to better understand where your liquor is going.

BarkeepOnline

BarkeepOnline is an add-on, hosted service that provides the tools to monitor and assess your Pour Cost. BarkeepOnline uses inventory data generated by Barkeep to track Liquor Usage and combines it with Sales Data either automatically generated by your POS system or manually entered into BarkeepOnline.

The unique feature of BarkeepOnline is that it determines exactly how much of each category of liquor should have been used based on your Sales Data and calculates exactly how much "lost product" has been consumed. In other words, BarkeepOnline can tell you that, according to sales, you should have used 104.23 ounces of Call Liquor and instead you used 122.38 ounces, which is a loss of 18.15 ounces or a little over half a bottle. This is extremely powerful information, because it allows you to focus in on exactly which types of liquor you are "losing" and how much of it is getting "lost."

Barkeep customers typically reduce their overall Pour Cost by at LEAST 1%, and generally by 2-3%, by using BarkeepOnline.   Reducing Pour Cost by 1-3% is equivalent to reducing the amount that you spend on liquor by 5%-15%. Do a little simple math, and you'll see that Barkeep and BarkeepOnline will pay for themselves in the first month that you start using them. How's that for ROI!

Configuring your iOS Device
for BarkeepOnline

To configure your Device for BarkeepOnline, you must first register for a BarkeepOnline account. You do this by going to barkeepapp.com, clicking on BarkeepOnline, choosing New User, and then following the instructions for setting up a new BarkeepOnline account.   As part of registering for a BarkeepOnline account, you will choose a username and password.

Note: There is a separate **BarkeepOnline User Guide** at barkeepapp.com

After you have created your BarkeepOnline account, you will need to register your Device(s) with BarkeepOnline.

Check your connection and battery life first!
Before Registering any Device with BarkeepOnline, please make sure that you have a reliable network connection and plenty of battery life remaining on your Device (or your Device is plugged in). Registering your Device includes synchronizing data between your Device and your BarkeepOnline account. This process can take some time (15 minutes for hundreds of Inventories and 10's of thousands of Inventory Items), and this process should not be interrupted. So be prepared when you register your Device.

Configuring Your Device for BarkeepOnline (cont.)

To register your Device with BarkeepOnline:
1. Verify you have a reliable network connection and plenty of battery life.
2. Press Settings on the BarkeepApp Main Screen. **a**
3. Then choose **BarkeepOnline**. **b**
4. Enter the Username and Password that you chose when setting up your BarkeepOnline account.
5. Press **Register Device**. **c**
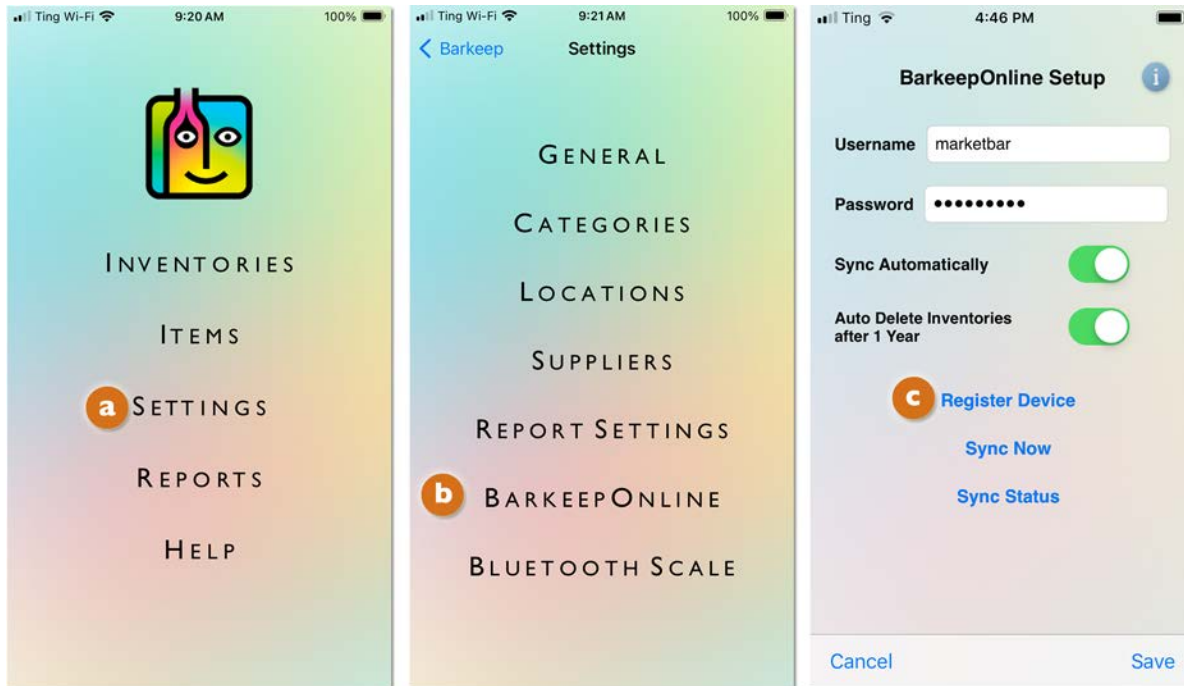
6. If your Device is able to successfully connect to BarkeepOnline and log into your account with the username and password that you provided, you will be presented with an alert stating that your Device has been successfully registered. If registration fails, please confirm that you have supplied the correct username and password, and that your Device has a reliable network connection.
7. Next you have to make a decision regarding copying data (see below and please read carefully)

The Important Choice!

Once your Device has been registered, you will be asked whether you want to:

Copy Data to Server   or   *Copy Data From Server*

First Device/Primary Device: You should choose a primary Device that contains the data that you would like to use to initialize your BarkeepOnline account. Register that Device FIRST, and choose ***Copy Data to Server***. This will initialize your BarkeepOnline account with the data from your primary Device.

Additional Devices: You can then register additional Devices with your BarkeepOnline account. For additional Devices, choose ***Copy Data From Server*** and NOT ***Copy Data to Server***. This will delete the existing data on your additional Devices and replace it with the data from your BarkeepOnline account.

Sync Automatically

Once you have registered your Devices, any changes that you make on your Devices will be automatically synchronized with your BarkeepOnline account. And, vice versa, any data on your BarkeepOnline account will be automatically synchronized with your Devices. Multiple Devices can be kept in sync via a single shared BarkeepOnline account.

By default, BarkeepApp will automatically sync changes between your Device(s) and BarkeepOnline. This happens in the background as long as your Device is on and has a reliable network connection and your account info remains valid.

If you don't want BarkeepApp to automatically sync data with your BarkeepOnline account, you can turn this feature off by deselecting the "Sync Automatically" ⬭ option on the BarkeepOnline Set-up screen.

Reminder: We also recommend that you turn on Auto Delete Inventories on any Devices that are registered with a BarkeepOnline account. See the **BarkeepOnline User Guide** for details.
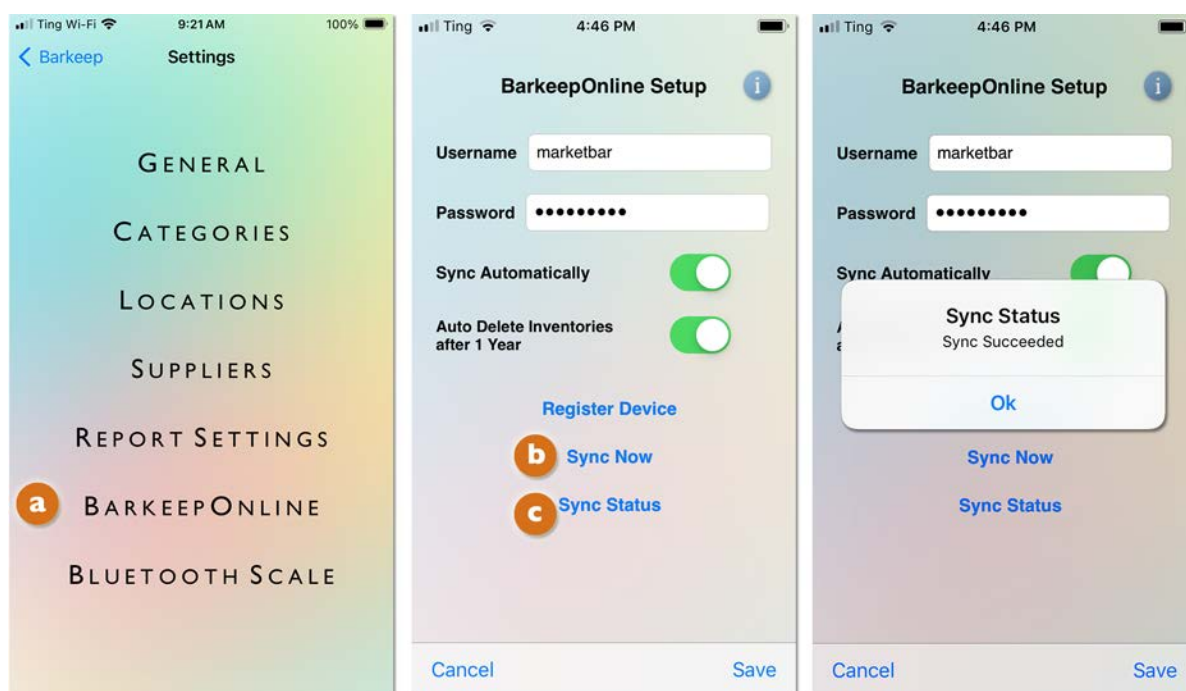
Manual Sync and Sync Status

You can also manually sync a Device by going to Settings and selecting **BarkeepOnline** ⓐ and then pressing **Sync Now** ⓑ to sync a registered Device.
You can verify your data was synced successfully by pressing **Sync Status**. ⓒ

Sync Automatically (cont.)

<div style="border:2px solid orange; background:#e8f4f8; padding:10px;">

Why is my iOS Device not syncing with BarkeepOnline?

✓ **Is your BarkeepOnline Account Subscription current?** When you log in to BarkeepOnline you can check your expiration date by selecting **Account Info** under **Settings**. If your account has expired, you will be prompted to renew your subscription when you log in to BarkeepOnline.

✓ **Are you connected to the internet?** Verify that your **iOS** Device has an Internet connection using either Wi-Fi 📶 or your phone's carrier network.

✓ **Contact Support** - If your account is valid and you have an internet connection, contact Barkeep support at support@barkeepapp.com and we will help you resolve the issue. You can reach us right from BarkeepApp with your **iOS** Device by selecting Help and then Contact Support.

✓ **Should I try redoing the registration? No!** Do not attempt to **Unregister** or re-**Register** your iOS Device unless we ask you to do so. This step, done incorrectly, could result in a loss of your Barkeep Data. Contact Support instead.

</div>

Sync Error Warning

When using BarkeepApp you might see the warning ⚠️ icon **a** at the top of the screen. This indicates that your registered, **iOS** Device is not syncing correctly. By pressing **b** the icon ⚠️ a pop-up warning will appear explaining there is a Sync Error.

Note: This warning will only occur if the **iOS** Device that has been registered with a BarkeepOnline account.
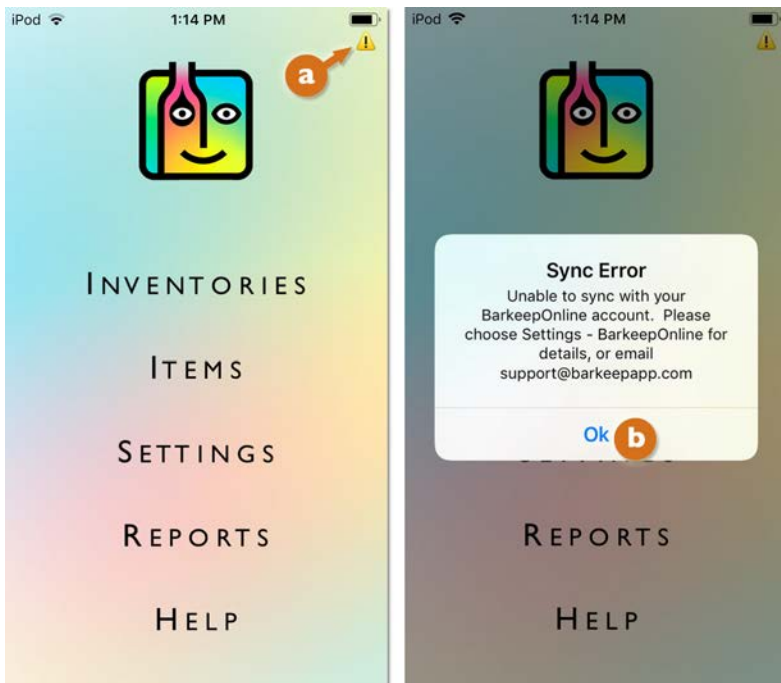
Data Backup

Only users who have registered their Device(s) with BarkeepOnline can take advantage of the automatic syncing feature. This is the recommended method for backing up the Barkeep data on your **iOS** Device(s).

When your **iOS** Device is backed up to your computer, your latest Barkeep data is usually included as part of the backup. Accessing that data would require restoring the entire Device. Only BarkeepOnline Users have their data backed up regularly and frequently with auto syncing.

Can I back up my Barkeep data with iCloud?
Yes, **iCloud** can be set to back up your Barkeep data file and would enable you to restore your data if needed.

Note: It is important to check your **iCloud** settings in your **iOS** Device to make sure your BarkeepApp data is being backed up.

Can I share Barkeep data between iOS Devices with iCloud?
No. An active BarkeepOnline account is the only way for users to use multiple Devices and share and sync data.

Glossary

Accuteck – a digital shipping scale that enables BarkeepApp to weigh kegs and manually enter the weight into Inventories. The scale is available for purchase at barkeepapp.com.

Banquet Inventories – a list of Transfer, Receiving, Return, Waste, and Empties Inventories associated with a Banquet. These inventories are directly associated with a Banquet and will be used to calculate Banquet Usage.

Category – crucial for organizing Items into logical groupings. Every Item in Barkeep should be assigned to a Category.   Barkeep uses Nested Categories which means that a Category can also have a Parent Category. For example, users could create a Category called Imported Vodka which has a Parent Category called Vodka that itself has a Parent Category called Liquor. In this scenario, the Item Absolut 1L is assigned to the Category Imported Vodka which is part of the Category Vodka, etc.

CSV – is an alternative format for reports generated by BarkeepApp. The default format is Excel. The Reporting section of this User Guide has additional information.

Data – includes the Categories, Locations and Items in your account. Including the unique ones that you have added. Data also includes the Inventories you have performed with BarkeepApp.

Escali SmartConnect – a digital scale that enables BarkeepApp to automatically detect the weight of partial bottles. The manufacture discontinued the model.   But existing scales purchased via barkeepapp.com continue to work with BarkeepApp.

Etekcity Luminary – a digital scale that enables BarkeepApp to automatically detect the weight of partial bottles. Only those purchased via barkeepapp.com are certified to work with BarkeepApp.

Infinea Tab – is a small device that attaches to the bottom of an **iPad**. The **Infinea Tab** and **Infinea Tab** M provide a barcode scanner, magnetic stripe reader, and backup battery supply.

iOS Device – refers to Apple Devices that support BarkeepApp including the **iPhone**, **iPod Touch** and **iPad**. Your Primary Device is the first Device you register with BarkeepOnline to upload your data to the BarkeepOnline servers.

Item – refers to any product that you carry in inventory – like **Absolut 1l** bottles, **Stella** 15.5 Gal Kegs. The Item contains general information about the product like its barcode, default price, default case size, container type (bottle • keg • can • each • box • bag • bag in box • carton), full bottle weight, empty bottle weight, etc.

Item Code – refers to a number or other identifier used by your Supplier to identify products when placing orders. It may be the same as the UPC barcode, or it may be a different identifier determined by your Supplier.

Inventory – Barkeep allows you to create six different types of Inventories each type each designed to generate different sets of information. Full definitions can be found in the Inventory section of this User Guide.

Inventory Item – refers to an entry in an Inventory specifying the quantity of an Item for a particular Location. Depending on the Inventory type, this can represent the quantity of an Item in stock in a particular Location, the quantity of an Item received into or returned from a Location, the quantity of an Item transferred between two Locations, the quantity of an Item wasted (broken, spilled, etc.) at a particular Location, or the number of empty bottles (breakage) for a particular Location.

Location – refers to separate Locations in your bar or venue. For example, you can have a single Location named "My Bar," or you can have many Locations like "Storage," "Walk-In Cooler," "Well 1," "Well 2," "Patio Bar," etc. Barkeep is able to track Inventory and usage by multiple Locations. You may set up just one Location or any number of Locations to suit your business.

Linea Pro – is a barcode scanner. This is the same device used in all Apple Stores to scan Items and process credit card transactions. The **Linea Pro** scanner is a small cradle that you slide an **iPod Touch** or **iPhone** into. The cradle provides a barcode scanner, magnetic stripe reader, and backup battery supply.

Pour Cost – is determined by dividing the cost of all liquor used by your sales over the same period. After completing an Inventory, you can generate a Usage Report. It will give you the totals needed to determine Pour Cost. Further information can be found in the Pour Cost section of this User Guide.

Recipe – in BarkeepOnline a "Recipe" refers to the mix of Items used in a Sales Item. A Recipe is how Barkeep defines the amount(s) of any products (Items) used in a Sales Item. For example, a Recipe can be the mix and amounts of liquor to make a particular cocktail, but a Recipe is also the 16 oz of Guinness Draft Beer in the Sales Item Guinness Pint or the 1.5 ounces of Call Liquor in the Sales Item Call Shot. Recipes are used to calculate how much liquor should be used for each of your Sales Items when calculating your Expected Usage and Expected Pour Cost.

Sales Items – refers to things that you sell and ring up on your cash register or POS system. Sales Items are defined in BarkeepOnline. The Sales Items should mirror the Sales Data that you generate from your POS System or cash register. While the names in your Sales Data and your POS System do not need to be an exact match, we suggest using names that are similar so that you can easily enter Sales Data and match it to your Sales Items in BarkeepOnline. Sales Items should not be confused with Items as in the products your carry and enter into Barkeep (see Items defined on previous page).

Starting Inventory – refers to an initial Full Inventory that is used as base to compare data with future Inventories.

Supplier – refers to any supplier, vendor or company that provides you with Items (the products you carry in Inventory).

Variance – is how Barkeep describes the difference between how much liquor you used versus how much you should have used (based on your sales). A positive number in your Variance means that you used more than you should have, and a negative number indicates that you used less than expected.

Venue – is the term Barkeep uses to describe the different bars, clubs and restaurants you may own or manage. We do not refer to these as "locations." Location has a different definition in Barkeep (see above).