

# Restaurant Manager

## Customer Setup

### Local Integration

This requires the BarTrack Software to be installed on the POS server. Some anti-virus and/or firewalls may need to be set up to allow the service to run in the background. Please allow a BarTrack support engineer access to the server for initial assessment.

Download our remote access software to get started.

[Click Here to Download](#)

### Installation Requirements

- Password to Restaurant Manager (we prefer having an account made for BarTrack)

This password should give us access to creating report groups and custom reports and assigning a security level to BarTrack custom group

- Windows username/password with Administration security level (we prefer having an account made for BarTrack).
- Windows 10 create user, see:
  - <https://support.microsoft.com/en-us/windows/create-a-local-user-or-administrator-account-in-windows-10-20de74e0-ac7f-3502-a866-32915af2a34d>
- Windows 7 & 8 create user, see:

- <https://support.microsoft.com/en-us/windows/create-a-user-account-in-windows-4fac6fd5-74c0-9737-69b8-6e77e00422dc>

## Best Practices

- If third-party deliveries are discounted to 0, but not with a coupon because the tax is already paid at the third party. If you deal with these orders in a different way, WE NEED TO KNOW THIS.
- We need to create a revenue center for this and initiate all orders of third-party type with this Revenue Center.
- We add these discounts back into the price of the item since the price paid becomes 0, which is technically untrue.
- Adding Items - Make sure all items are entered in the system properly before ordering.
- Avoid adjusting pricing on the fly, or using zero priced items like Open Items cause reporting inconsistencies.

## Technical Caveats (POS Dealer/Support Info)

- We use the MenuListing.xml export to retrieve raw pricing of items due to the fact that ItemsByTime.xml only provides the price paid.
- We're only able to pull a MenuListing.xml for current dates pricing and there is no way to reference historical pricing. Therefore, we would not be able to provide accurate data if a price change occurs, and for some reason, we have to run old reports because data changed or never reached BarTrack.
- Discounts are treated differently than coupons, they can be increased (to raise a price on the fly), or decrease showing a positive or negative amount.
- The CSV export seems to be broken on Restaurant Manager, so we export XML. The CSV option likes to nest records inside of a single column on random records. This probably means nothing to you as a user, but I'm noting it for good measure. It's not something you'll ever need to worry

about

- Reports may be wrong when attempting to retroactively pull reporting data to re-send when pos data is missing for a date. The reason for this that item prices are not kept separately per day. This also means pricing should not be changed on the last day of the month after midnight if possible. Prices changed after midnight would attribute to next days pricing on which we base our figures.

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