Quick Start Guide

Microinvest Warehouse Pro Light Restaurant

2016

Address: 215 Tzar Boris III blvd., 1618 Sofia, Bulgaria
tel./fax: +359 2 9555515, **National Tel:** +359 700 44 700
e-mail: office@microinvest.net, **http:**//en.microinvest.net

I. Application Installation

During the initial installation of the product, the application "gets to know" the computer system, on which it shall work and configures its features. The memory, processor and disk space are tested, as well as the availability of local network, printer and other peripheral devices. In order to facilitate the procedure, it is necessary that:

- The operation system MS Windows is stable;
- The date format in Short Date Format is dd.mm.yyyy.

The application can be installed from a CD-ROM or by obtaining the installation file directly from our web site http://www.en.microinvest.net.

Installing from CD-ROM

Place the CD-ROM containing ***Microinvest*** Warehouse Pro Light in the CD drive of the computer. Wait while the installation file loads. The main application window with the list of products appears.

Note: If the installation file does not load within 30 seconds after the CD is placed, you must select the CD-ROM and start Autorun.exe or go to the "Products" folder and select the application you wish to install.

1. The installation process consists of 3 stages:
   - System checking and installation of the required additional applications *(Microsoft.NET Framework, Crystal Reports, Windows Installer)*;
   - Selection of working directory;
   - Copying of files in the working directory.
2. After the installation process is completed, the last window contains an option to start the application.

Installing from the Internet

Go to http://www.en.microinvest.net, then go to the product page of the ***Microinvest*** Warehouse Pro Light. Click the **Download** button.

1. The installation file will be saved on your computer.
2. The installation process consists of 3 stages:
   - System checking and installation of the necessary additional applications *(Microsoft.NET Framework, Crystal Reports, Windows Installer);*
   - Selection of working directory;
   - Copying of files in the working directory.

Please, note that ***Microinvest*** Warehouse Pro Light point of sale application can be downloaded and installed for a free 30 day trial, after which you should purchase a license key.

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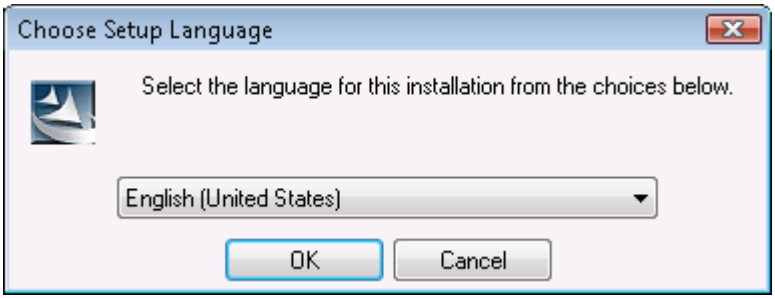
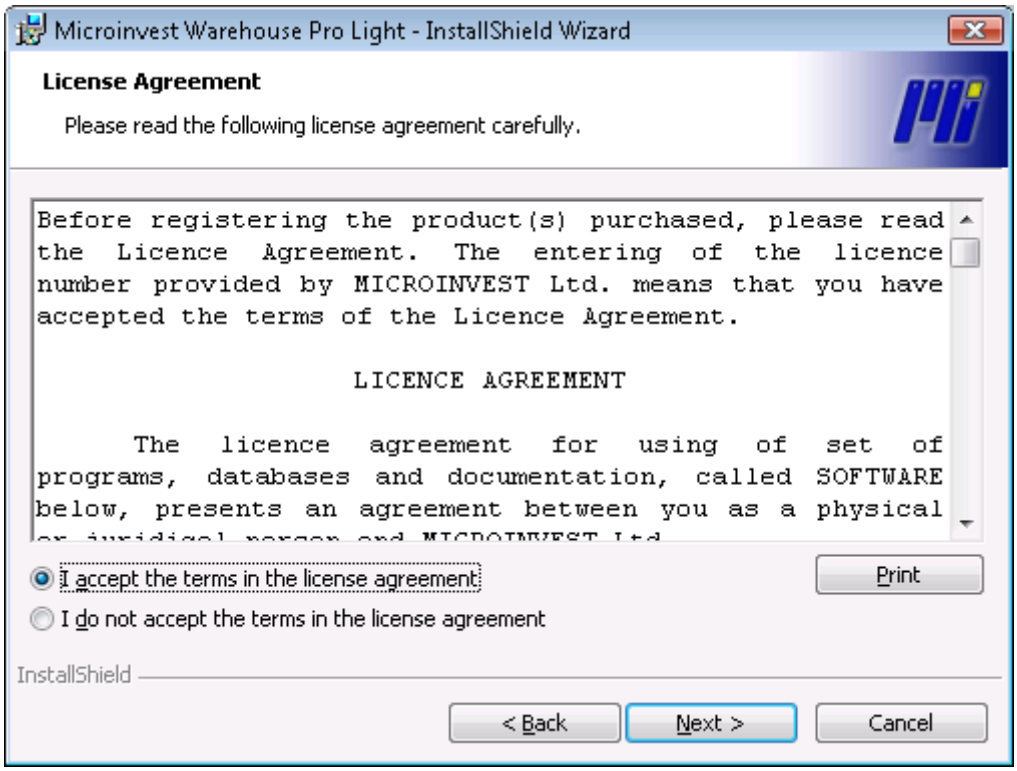
II. Microinvest Warehouse Pro Light Installation Steps

1. Choose the language you will work with. Then press **OK**.



2. The installation wizard will start up, press **Next**.

3. Read carefully the License Agreement and confirm that you agree with it. Then press **Next**.



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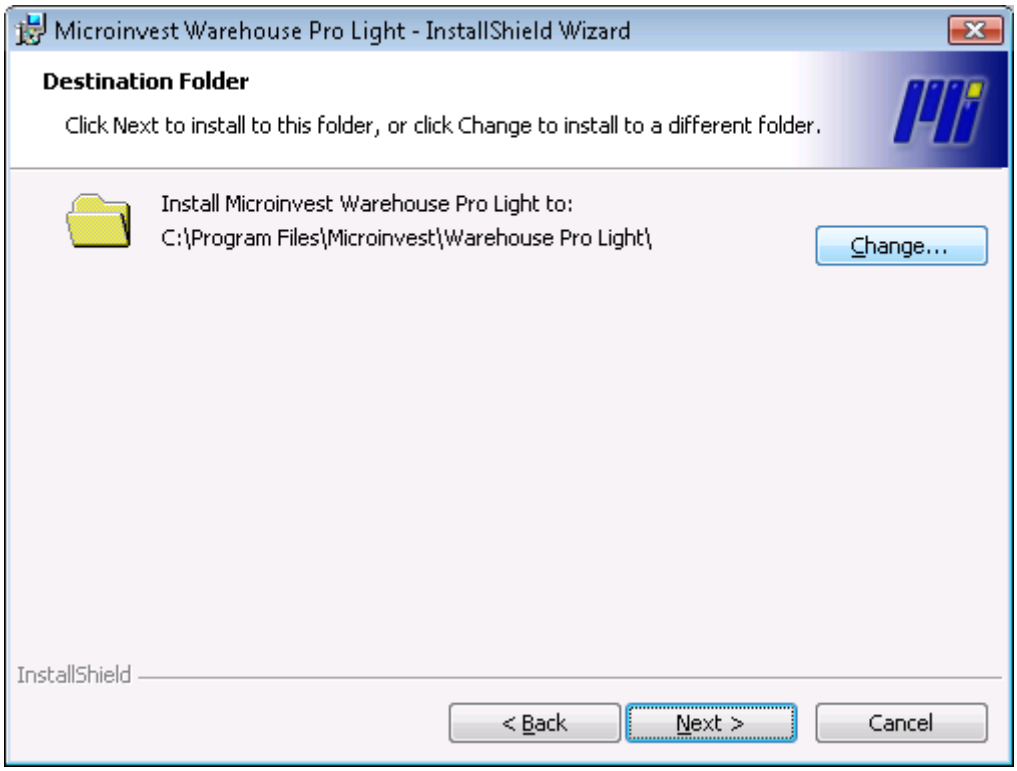
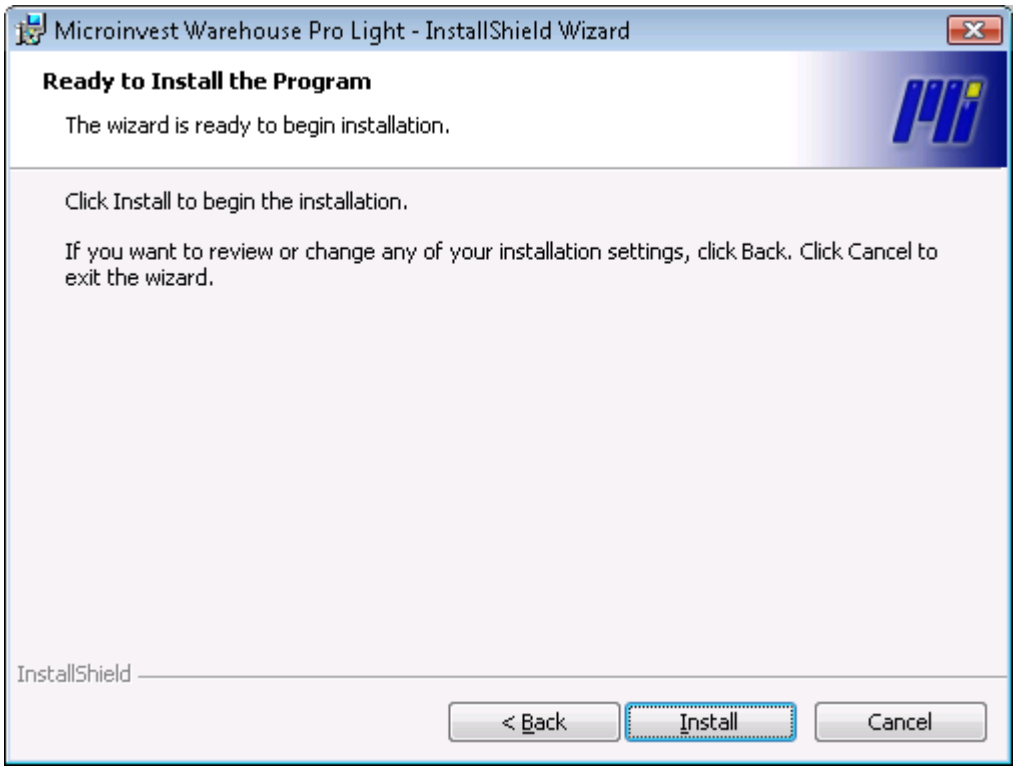
4. The Installation Wizard will install ***Microinvest*** Warehouse Pro Light by default in **Program Files** folder. If you prefer other folder enter the directory path using **Change** button.



5. Press **Install** button to start the process.



6. When the installation is completed successfully press **End** button.

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7. Start up the application from the following icon on your desktop:

III. *Microinvest* Warehouse Pro Light Restaurant Setup

Important to know!
Microinvest Warehouse Pro Light is designed to work in tandem with ***Microinvest*** Warehouse Pro which provides all back office functions. Please refer to the quick start guide of ***Microinvest*** **Warehouse Pro** how to set up the back office before you can move to using the point of sale module. ***Microinvest*** **Warehouse Pro Light** will not operate independently as the application cannot create its own database, but must use the created in advance database of ***Microinvest*** **Warehouse Pro**.

When you start up ***Microinvest*** **Warehouse Pro Light Restaurant** the program automatically checks the connection with the database of ***Microinvest*** **Warehouse Pro**. There are five mandatory requirements which must be completed in order to start work with ***Microinvest*** **Warehouse Pro Light Restaurant** in the back office module ***Microinvest*** **Warehouse Pro**. Those conditions are checked at start of the restaurant point of sale module and marked on the screen with a green tick. If there is a problem the condition will be marked with red tick. You should access ***Microinvest*** **Warehouse Pro** to fix issues with such setup conditions.

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ATTENTION: All of the steps below ought to be done in the main module of *Microinvest* Warehouse Pro!

Listed below are the settings required for ***Microinvest*** Warehouse Pro Light Restaurant :

Condition 1: Define passwords for each user (waiter) - Create New Users with unique passwords, at least one:

> **Steps:** Go to **Edit => Users => New** enter the name and the password and in filed **State** pick up the following option "The user is frequently used" to sort before others. Save the information at the end by pressing **Save** button.

Condition 2: Frequently Used Items – Mark all items which will be used in ***Microinvest*** Warehouse Pro Light Restaurant as "Frequently used" and divide them in groups.

> **Steps***:* Go to **Edit** =>**Items**. Select item and press **Edit**. Then from **State** field pick up "*Frequently used*". Go to **Groups** tab to create new group or use already existing one. Save the information at the end by pressing **State** button.

Condition 3: Define default locations with Code=100 – **This is the billing center of the restaurant module.** If you have large restaurant with few billing centers, you can set up the second center with Code=200, the third to be with Code=300, and so on.

> **Steps:** Go to **Edit** => **Locations**=> **New** with code 100, write name and from **State** field pick up "The location is frequently used, sort before others". Save the information.

Condition 4: Define the Tables in your restaurant (Locations code range 001-099). All tables within the first billing center of the restaurant (defined with Code=100 in a previous step) **will be set up as new locations** with codes 1, 2, 3…99. If you want to set up another location within the same restaurant (another floor for instance), you set up a new billing location with a code of 200 and each table handled by this location will be with a code of 101 through 199.

> **Steps**: Go to **Edit** => **Locations** => **New** write with codes from 1 to 99 with names. Most frequently the names are Table 1, Table 2… Table99. Then from **State** field pick up "The location is frequently used, sort before others". Save the information

Condition 5: Frequently used partners – you should mark all clients you will work with in the restaurant.

> **Steps**: Go to **Edit** =>**Partners** => **New**. From General Information write the name of the Partner and from **State** field pick up "Partner is frequently used, sort before others". Then go to **Additional Information** choose **Type** to be **Client**. Save the information.
>
> **Important note**: Check splitting (explained in a later section of this QuickStart guide) is a regular function for some restaurants and bars. To be able to use it in restaurant module, you need to set up two or three clients in the main back office system (***Microinvest*** Warehouse Pro) between which you can split and transfer customer checks and orders.

Start ***Microinvest*** Warehouse Pro Light Restaurant again from the icon on the desktop. Enter user name and password to open the main window.

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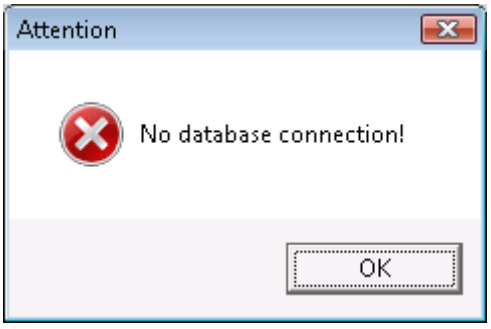
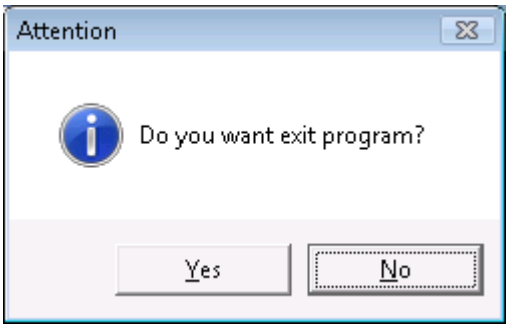
Open the database of *Microinvest* Warehouse Pro Light Restaurant

1. Make sure that you already have installed and set up ***Microinvest*** Warehouse Pro and database.
2. Start up ***Microinvest*** **Warehouse Pro Light Restaurant** from the icon on the desktop.
3. Notification "**No database connection**" will appear on your screen. Press **OK** button.



4. Notification **"Do you want to exit the program?"** will appear on your screen. Press "NO". At this point it is important to select **No**, because you do not wish to exit the application. If you click **No**, the application opens the **Settings** window.



5. Go to **Special** tab and select the database you already set up for your restaurant in ***Microinvest*** Warehouse Pro.
    a. For work with MS Access database:
        1. Choose **Database type** – MS Access.
        Insert the path to the database in the **Database path** field or press the button to browse to the location where the dabatase for your restaurant is located

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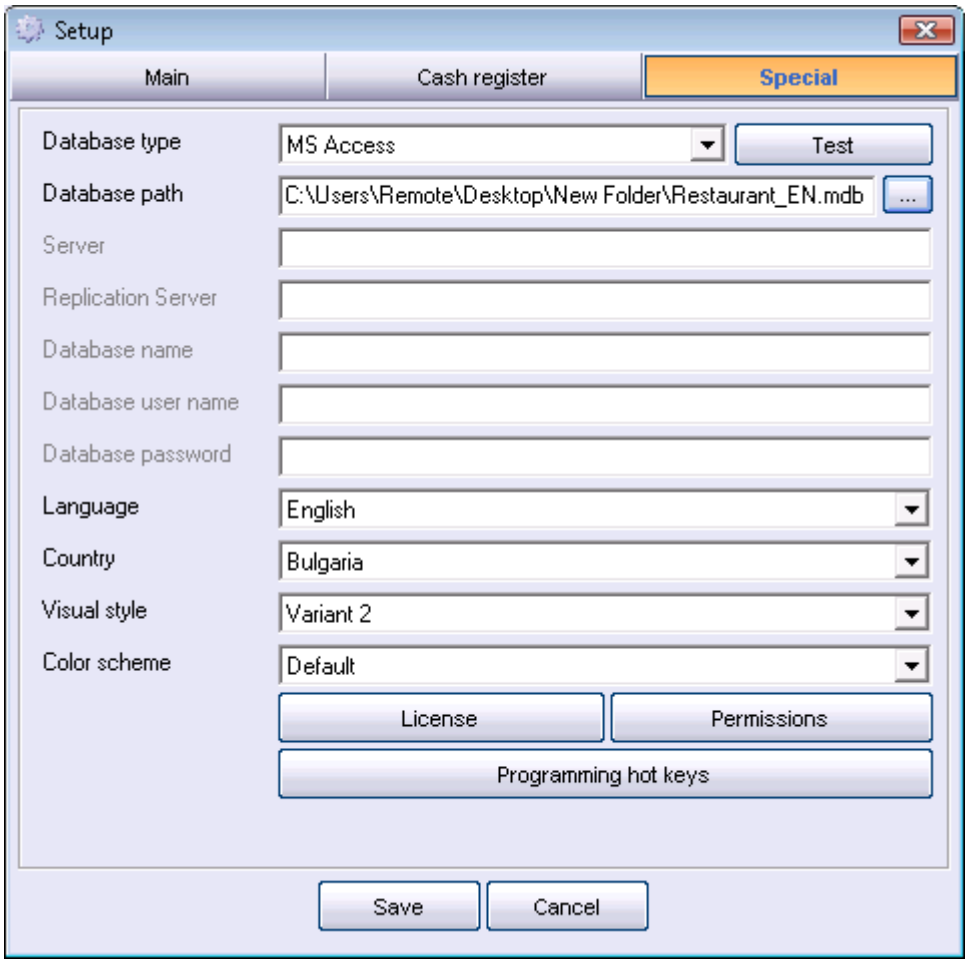

- For work with SQL Server database:
  - Choose **Database type** - MS SQL Server
  - In the **Server name** field fill in the name or IP address of the computer on which SQL Server is installed.
  - In the **Database name** field fill in the name of the database or click the button to the right to select an existing database *(if all other fields are filled in accurately)*;
  - In the **Database user name** field fill in the username for access to the database.
  - In the **Database password** field fill in the password for access to the database.

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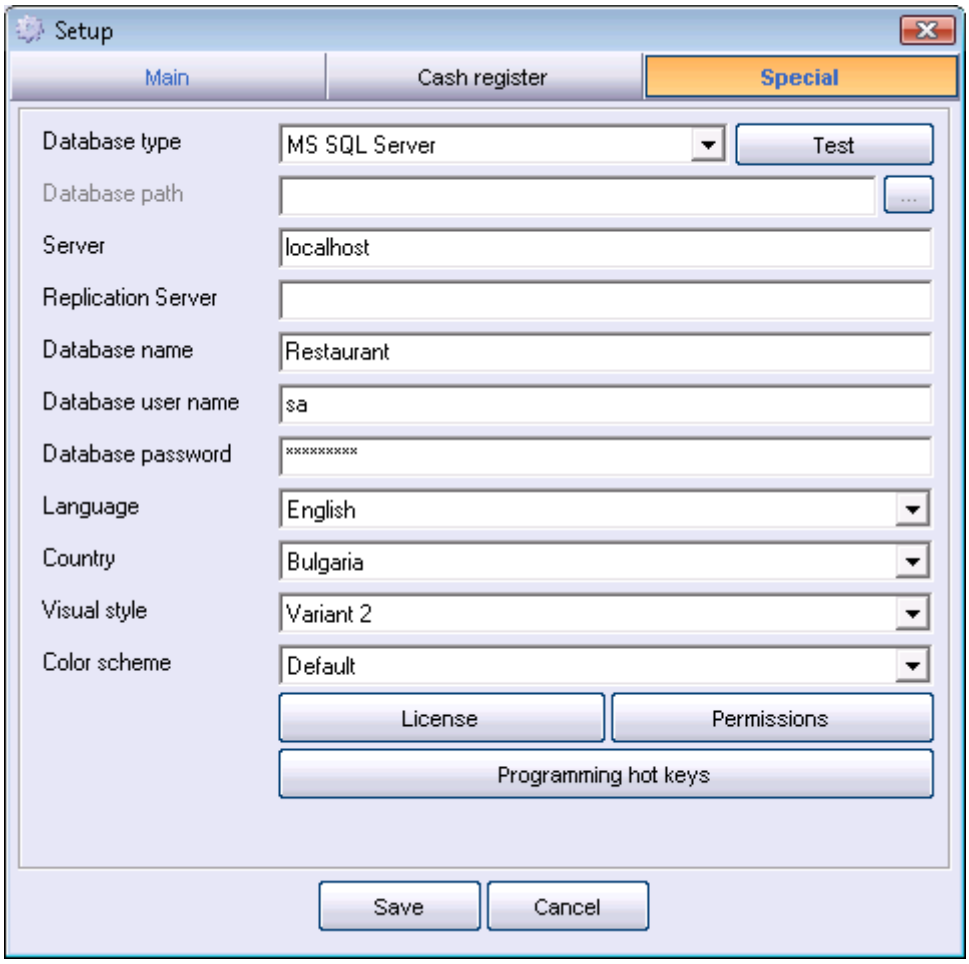

6. Use the **Language** field to select the language that you want to work with. .
7. Use the **Country** field to select the country you will work in. This selection drives a number of functional changes in the product according to the country legislation
8. Visual styles – the application has three different visual styles:
   - **Visual style 1** – all items are displayed as a list on the screen. It is oriented towards fast work with the mouse and the keyboard
   - **Visual style 2** - all items will be in a picture form. This is good for touch screen setup where users need large buttons for quick selection.
   - **Visual style 3** – this is a visual editor of tables and is a new advanced system for creation of restaurant models with table position scheme.
8. Save the information

The system settings are made only upon initial starting of the application. After that ***Microinvest*** **Warehouse Pro Light Restaurant** automatically loads the selected database.

IV. Working with Microinvest Warehouse Pro Light Restaurant

Microinvest Warehouse Pro Light Restaurant has a powerful settings system for configuring of the application according to specific user needs. To activate the settings click the icon or use keyboard shortcut **Ctrl+S**. Settings are visible only to owners or administrators. Users with lower access level cannot open them for better system protection. After the Settings window is visualized, the desired changes in the application functions can be done.

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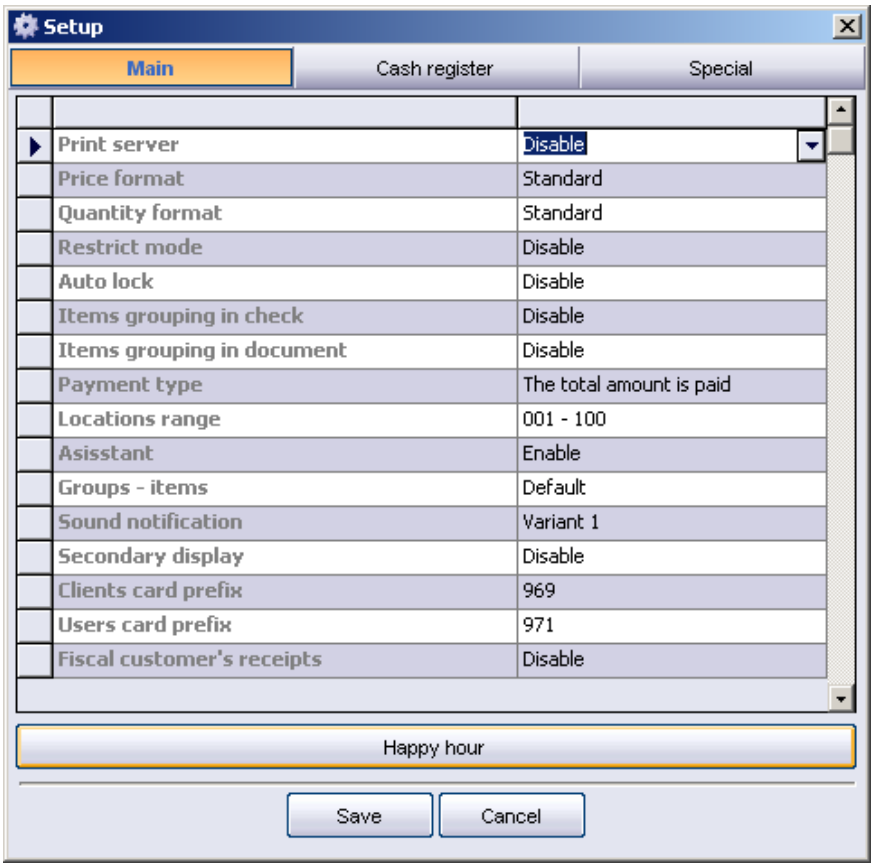
In the **Main** tab you can modify the functions according to your restaurant needs, define the location, access level, price format, etc.



The **Cash register** tab allows you to work with various peripheral devices and you can specify what shall be printed on them and in what order. When choosing a particular device model from the dropdown menu, the program automatically displays the settings that are configured by the manufacturer and are necessary for the proper functioning of this device. These settings can be changed if necessary.

1. Connect the devices to your computer. Start up ***Microinvest*** Warehouse Pro Light Restaurant and input your peripheral device specifications in the device setup windows.
2. Go to settings icon, **Cash Register** tab.
3. From the dropdown menu for every peripheral device, select the model and specify system settings.
4. Press the button **Test – fiscal device** in order to test the device.
5. Press **Save** button to save all changes and close the window.

To set again the default settings, press **Default** button.

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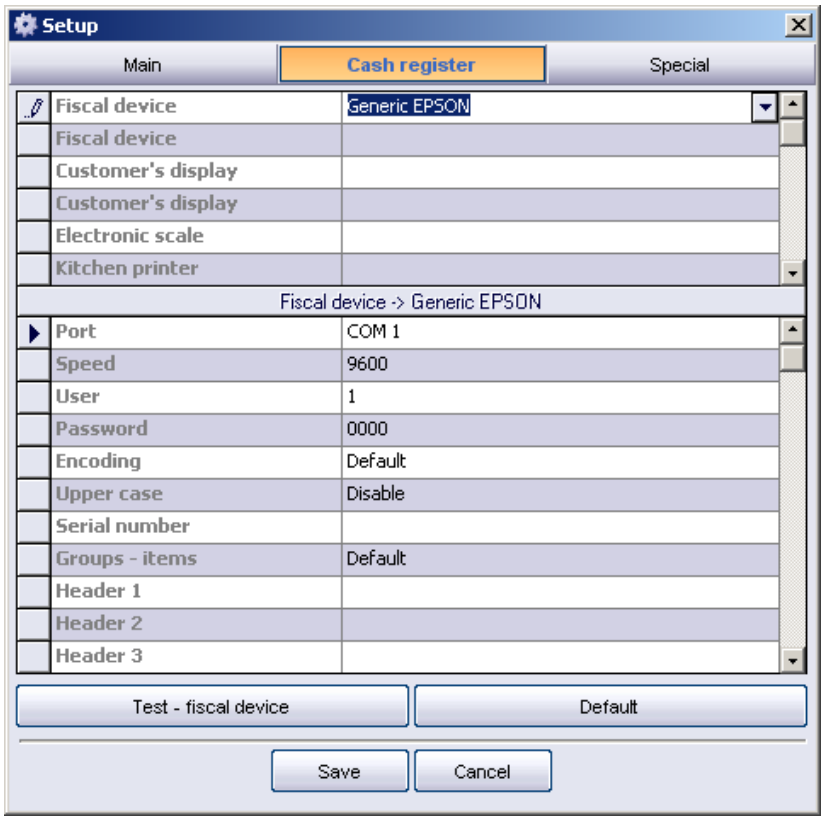
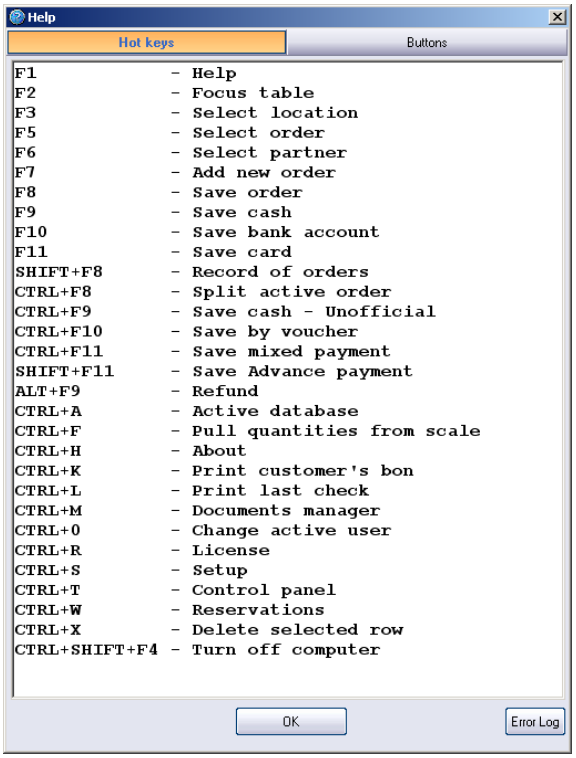


Work with Help Menu

You can open the Help menu by pressing **F1**. The first tab **Hot keys** contains a description of the keyboard shortcuts in the application:



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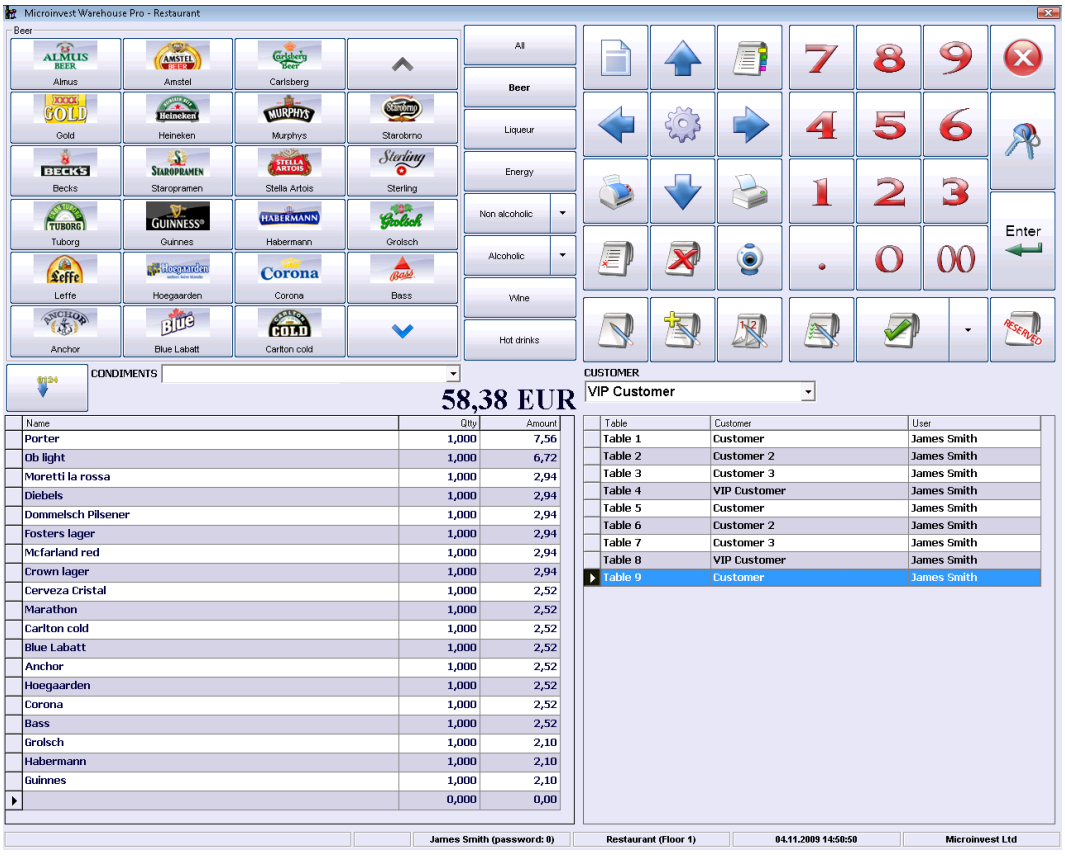
All function can be accessed via the buttons on the screen as well:

When the application is ready for work and the user has logged in, the main application window is activated.



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Visual Styles in *Microinvest* Warehouse Pro Light Restaurant

As we already mentioned **the Restaurant** module has three different visual styles. To change the current visual style, please go to **Settings->Special->Visual style**.

Visual Style 1

This style is developed for busy places and fast work with mouse and keyboard. To select table and partner go to the dropdown menus **Table** and **Customer**.

Visual Style 2

This style is oriented towards work with a Touch Screen POS terminal. The new feature in this screen layout is the possibility to label all items with pictures. The picture files of the items must have a **.JPG** extension and must be saved in subfolder **Pictures**, which must be created in the installation folder of *Microinvest* Warehouse Pro Light Restaurant. Please note that the names of the JPG files have to match the code of the corresponding items. Their resolution depends on the resolution of the Touch Screen - 800x600, 1024x768 or 1280x1024.

The **Pictures** folder can contain also files with an **.avi** extension. This is an attractive feature and allows watching of commercial clips, when the application is in standby mode *(the operator is logged off)*. This is one of the latest trends in restaurant software and allows playing of sponsors' commercial clips or advertising of promotions in the restaurant. It is recommended to use smaller size files, i.e. shorter clips, otherwise this could additionally load the computer and impede the application.

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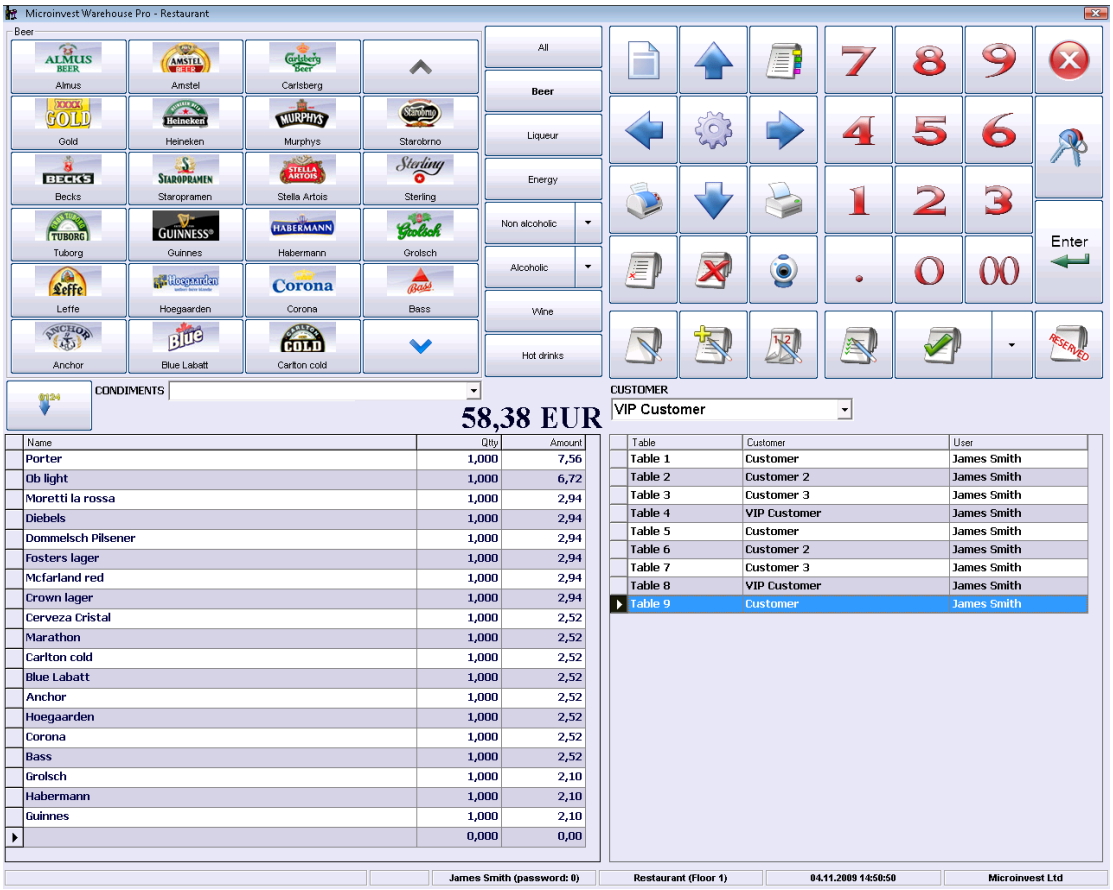
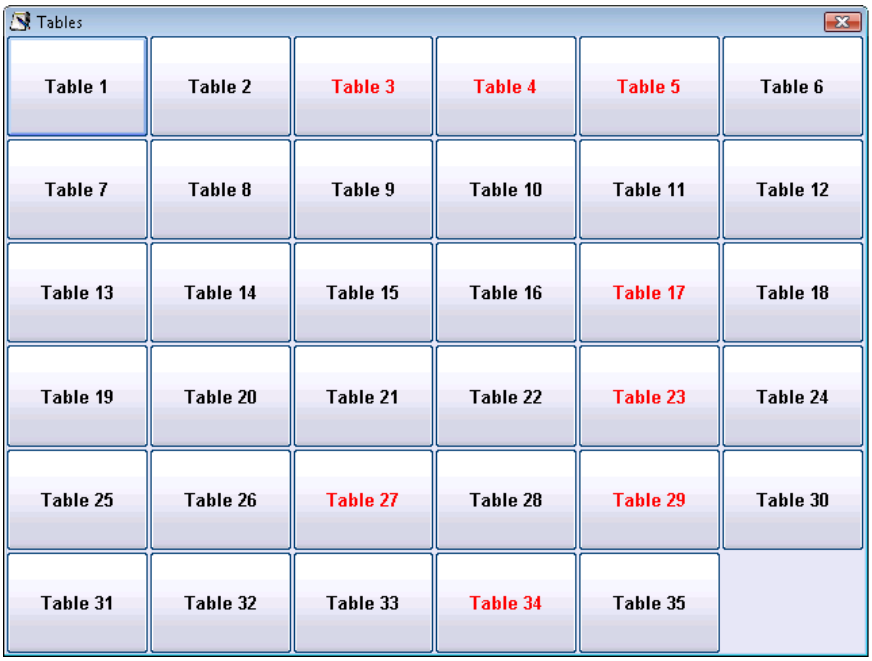


To add a new order in Visual Style 2, use the button and select a table. If the table is busy, it is marked with red.



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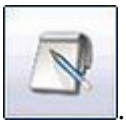
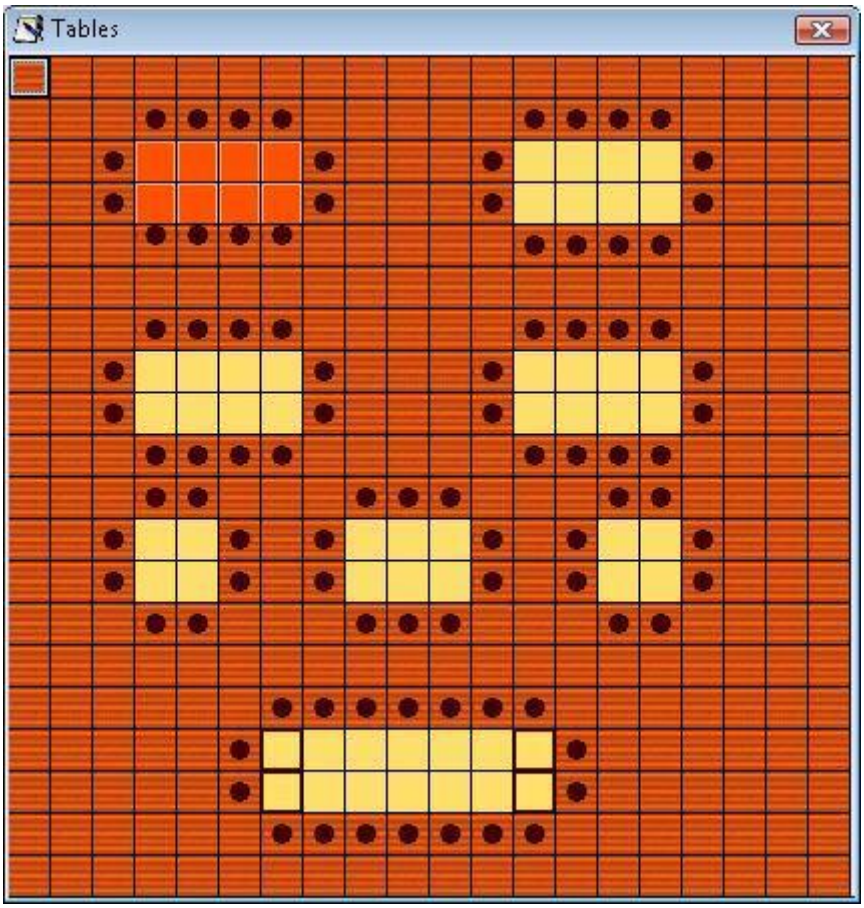
Visual Style 3

This is the latest visual style of ***Microinvest* Warehouse Pro Light Restaurant.** This is a visual editor of tables and is a new advanced system for creation of restaurant models with table position scheme. To add a new order, press the button  . A window with table scheme will automatically open. Busy tables are marked with red. After selection of the table, the window will be automatically closed.



Users can set up the layout in their restaurant by selecting the "Settings" gearwheel, then selecting "Special" -> "Variant 3 " in the **Visual Style** dropdown, and clicking on the **Visual Editor** button that shows at the bottom of the window. A visual editor opens up where the user can specify the size of the restaurant, table layout and type of tables. To insert a selected shape in the layout, select the shape in the vertical menu and double click on the square where you want this shape to appear.

After you are done with creating your layout, please save your work so that the restaurant layout grid will show on the screen in the future.

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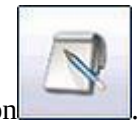
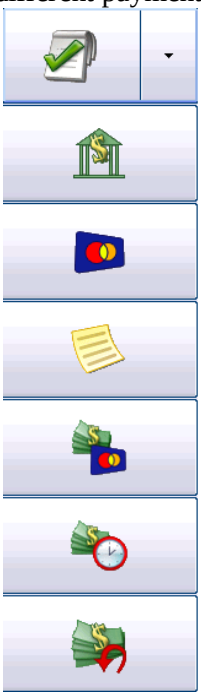
How to add a new order?

- To begin servicing the customer, to add a new order or to select items from the list in **Visual style 1** use the dropdown menu **Table** to select the table. In **Visual Style 2** and **Visual Style 3** click the button  .
- Add the items and their quantities.
- To close orders use the buttons for different payment types.



Management daily reporting function

Most often repots made at the end of the day are so called Z and X reports. Below we'll give you some tips. To create some of them go to **Control panel** (use keyboard shortcut **Ctrl+T** or button), then to the first tab **ECR Reports.** In this tab are managed different fiscal reports:

- Daily Z report with clear - made at the end of the day, this report clear all transactions for this day;
- Daily X report without clear - made at the end of the day;
- Print ECT – Print Electronic Journal
- Report for period by dates – short;
- Report for period by dates – full;
- Report for period by records- short;
- Report for period by records- full.

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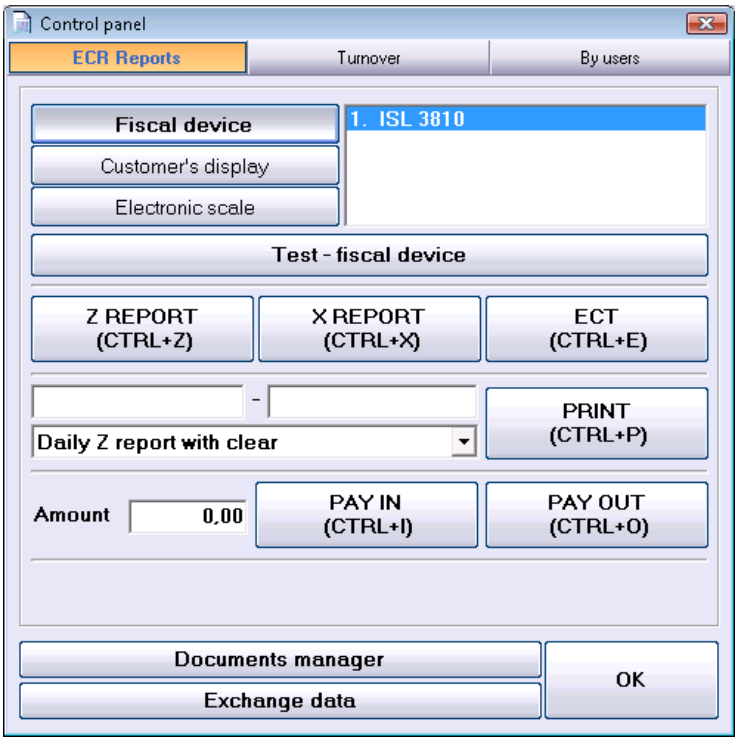
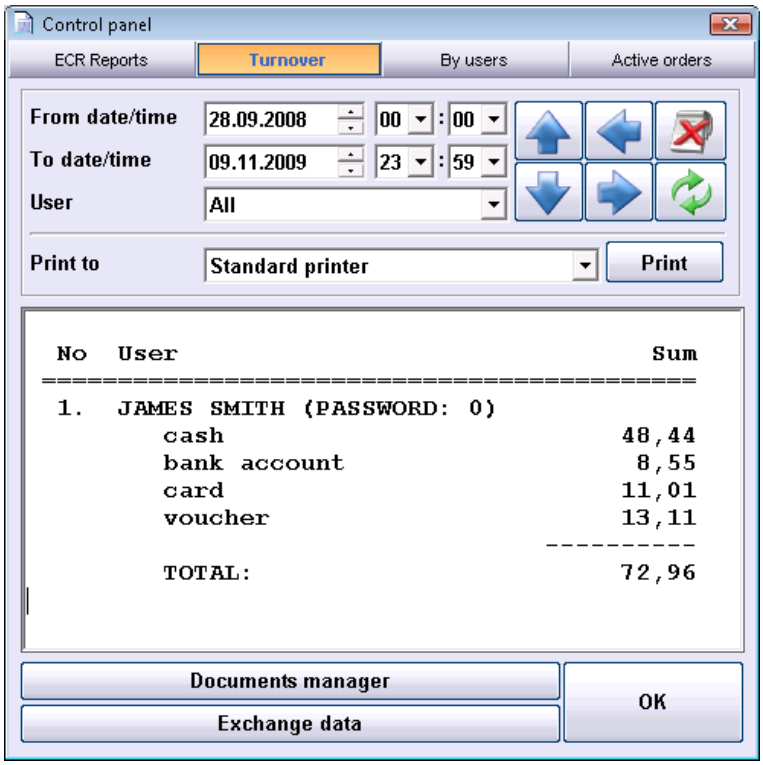


The buttons **Pay In** (***Ctrl+I***) and **Pay Out** (***Ctrl+O***) allows the operator to deposit and withdraw official money in the cash register till.

To make a report by turnover go to **Turnover** tap and select the criteria you want (date, time, user, and printing device).



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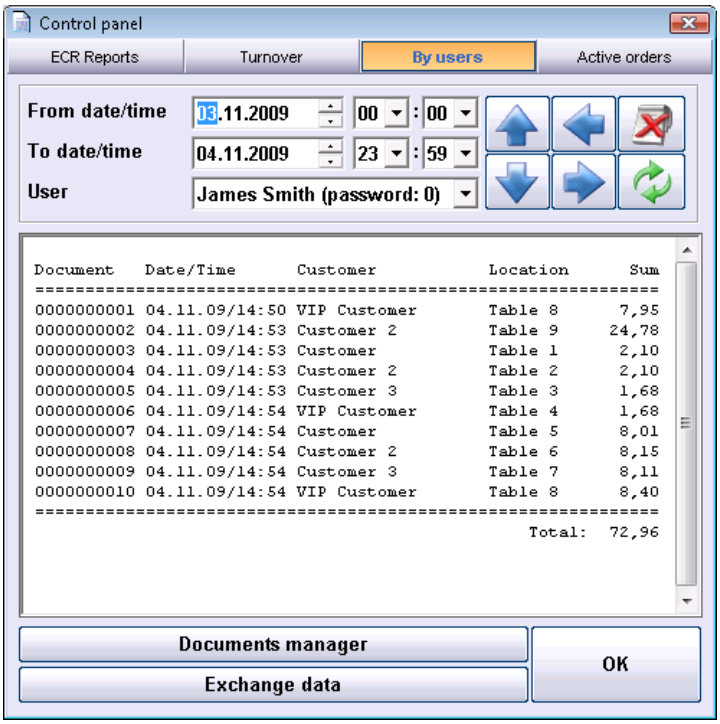
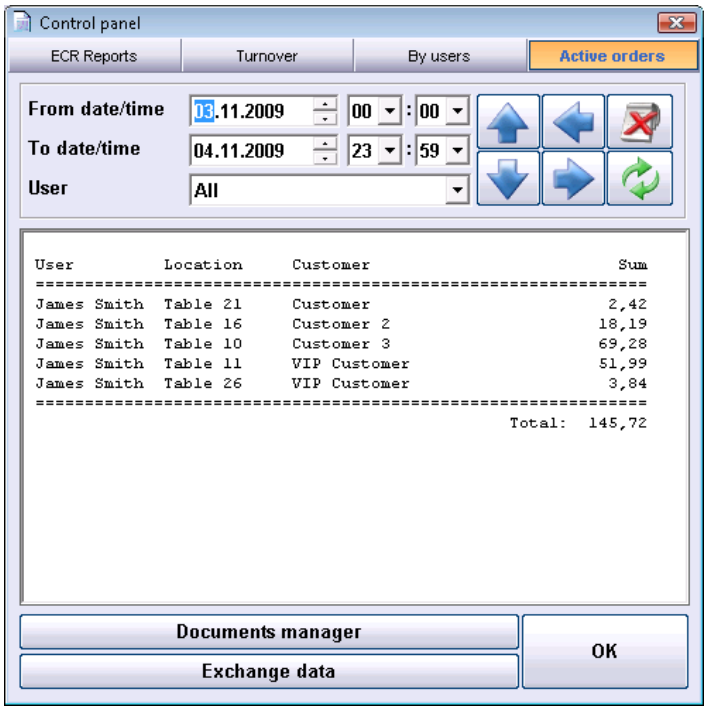
To make a report by turnover go to **By users** tap and select the criteria you want (date, time, user, printing device).



Please, note that all transactions created via ***Microinvest*** Warehouse Pro Light Restaurant module are available to managers using ***Microinvest*** Warehouse Pro where the more robust reporting is available.

In the last tab **Active orders** are listed all active orders (which table, customer, waiter, current total).



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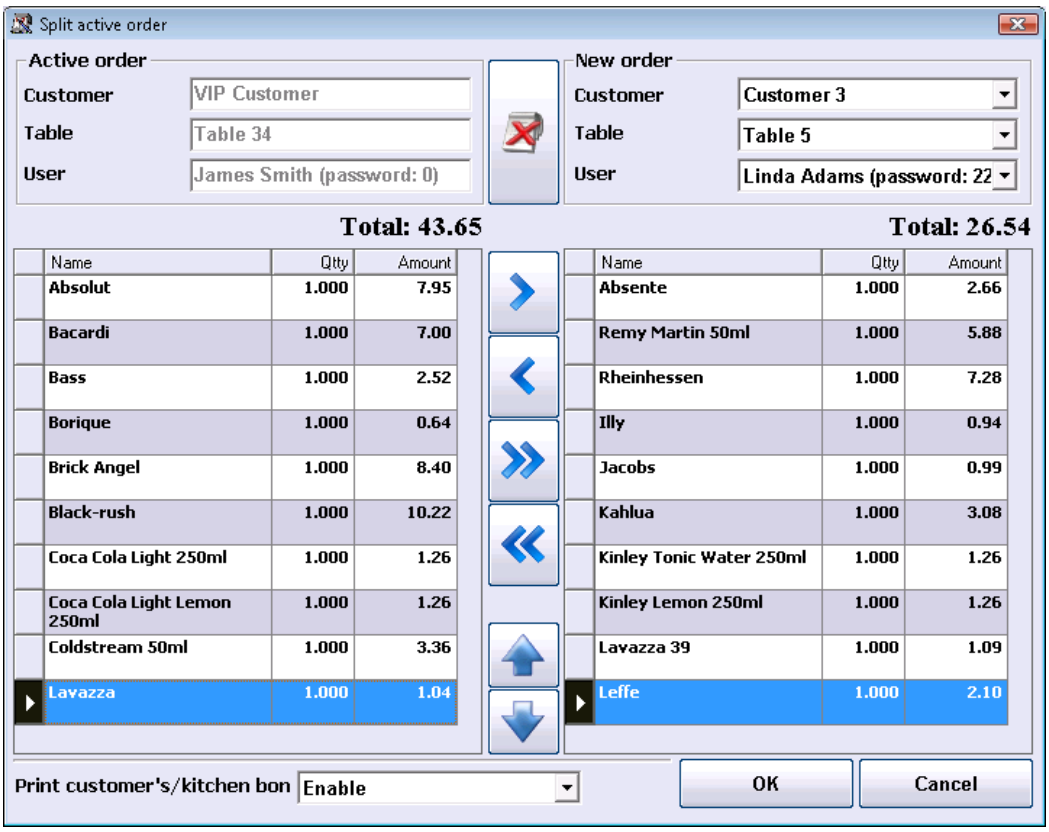
Splitting orders

To activate the window for splitting an order, use the button or use the keyboard shortcut ***Ctrl+F8***. As explained above, at least two customers need to be set up in the main Microinvest Warehouse Pro module amongst which a user can split the customer checks. In the example below, "VIP Customer" and "Customer 3" are used for the check splitting.

Use this function in case of:

- Splitting order by tables, by customers
- Transfer an order to other table, customer, user (waiter)
- Merge two orders



To split, merge or transfer an order, select the customer, the table and the waiter. After that mark the items one by one and through buttons and transfer every item. The buttons and allows you to transfer the entire item's quantity at once.

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tel./fax: +359 2 9555515, **National Tel:** +359 700 44 700
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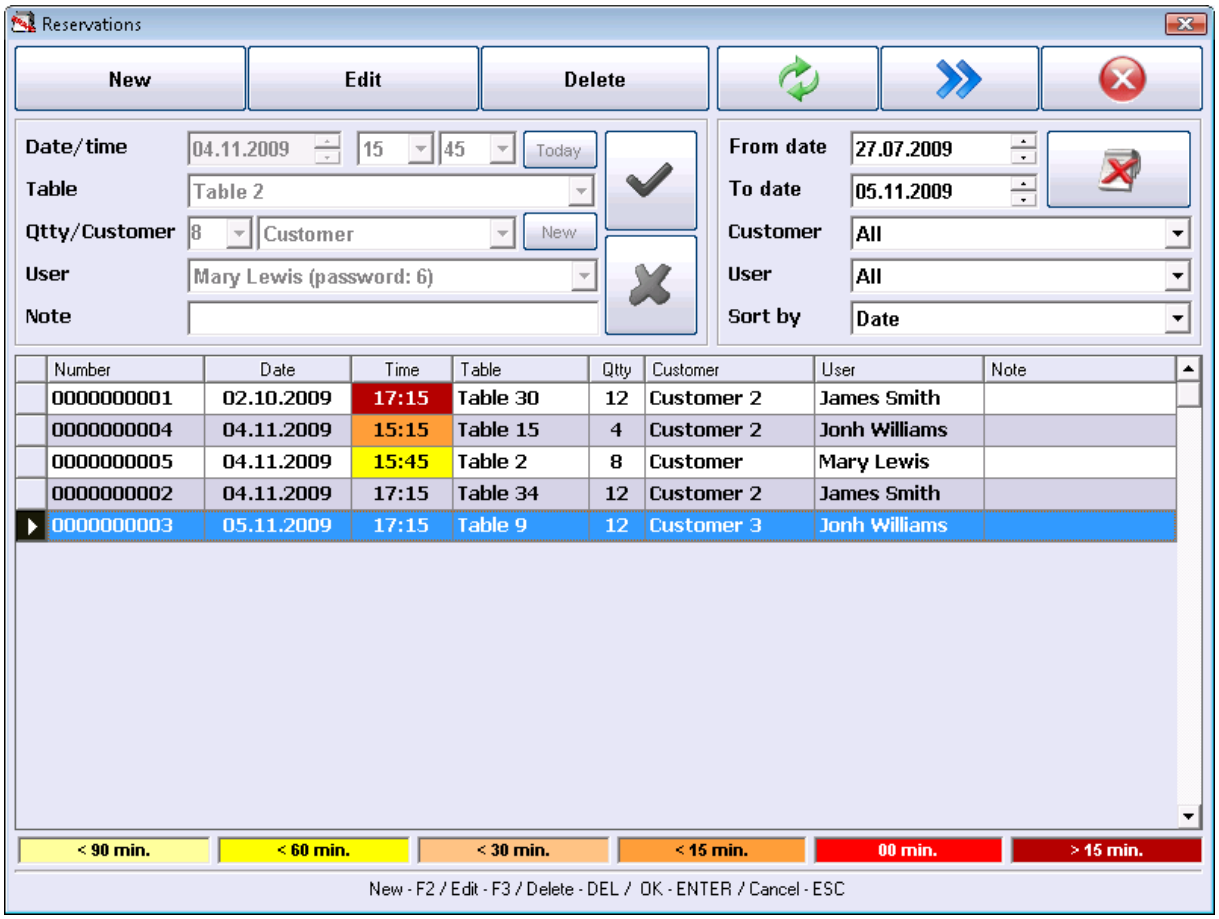
Reservation module

The following functions are available in the Reservation module:

- Add new reservation, edit an existing one and delete a reservation.
- Transfer a reservation to an active order
- Report for reservations filtered by certain criteria (data and customer)
- Availability for tracking the status of all records

To active the module, please use the button

or press **Ctrl+W**.



To add a new reservation press **New** and enter the date, time, table, and party of how many people will come. Use the button to confirm the reservation. With button clear all data.

To transfer a reservation to an active order use the button , but firstly mark the reservation.

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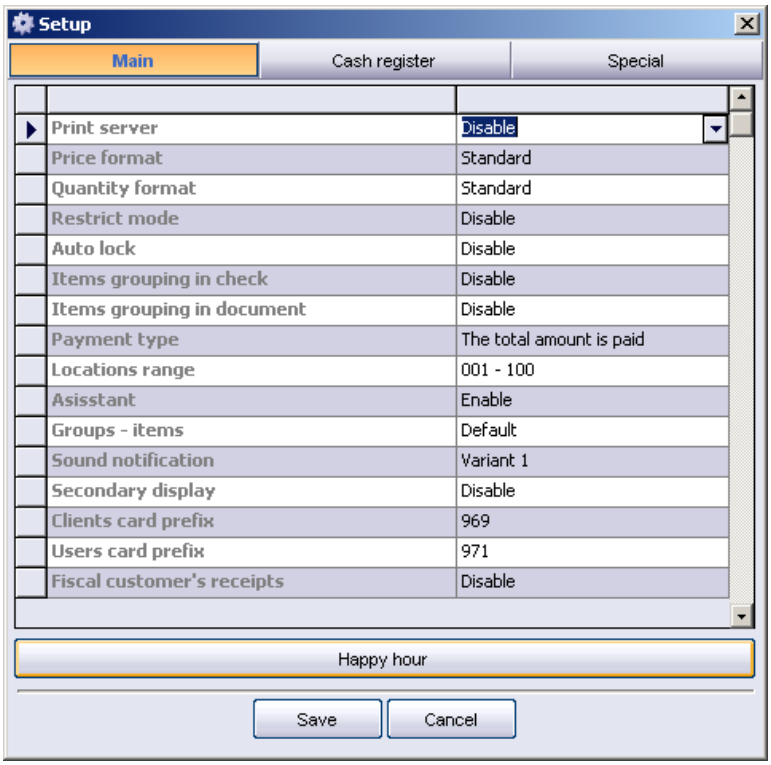
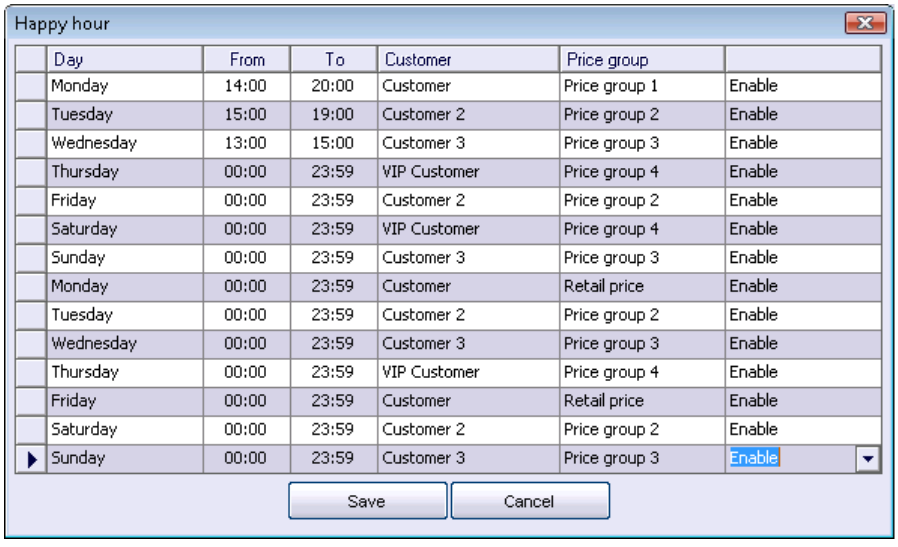
Happy hour

Open the **Setup** window and press the button **Happy hour.**



A window called **Happy hour** will open. Here you can define the days and what hours in your restaurant will have Happy Hour, i.e. when certain items will be offered at a special price. To set the special price, you should define special price group and customer for which this price group will be applicable. This setting should be done in advanced in the back office system ***Microinvest*** Warehouse Pro**.**



Feel free to send us an email with a specific question and we will be glad to assist you. Thank you for choosing ***Microinvest*** Warehouse Pro!

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