InTuBars™ User Guide:

Reports

Vendors

Product List

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InTuBars™ main menu screen

When you first open the InTuBars™ application you will find a screen that looks like this:

Figure 1: Main Screen

Main menu options are listed in a column of clickable buttons on the left side of the screen. Make your selection from the following choices:

- **Synchronize Bar Pilot**. Click on this button to open a pop-up window that will allow you to start the HotSyncing process.
- **Reports**. Click on this button to open the Reports menu.
- **Product List**. Click on this button to open the Product List database.
- **Orders**. Click on this button to open and then generate purchase orders.
- **Vendors**. Click on this button to open the Vendor database, where you can find, add and e-mail vendors.
- **Edit/View Transaction Log**. Click on this button to edit or view a transaction log documenting all your purchases, breakages, orders, and current inventory.
- **Utilities**. Click on this button to re-install software on the BarPilot™, register the BarPilot with HotSync, or fuse your last two inventory scans.
- **Download Prices**. Click on this button to download updated product prices from InTuBars. This option is open only to current subscribers to product list updates.

You can return at any time to the main menu by clicking on the following icon:

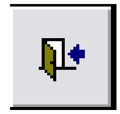
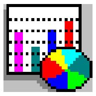


Figure 2: Close Screen

This icon will appear at the top and center of each screen, unless you have generated a report. In this case, to return to the main menu, close the open report window.

Reports



InTuBars™ reports can be generated once you have run the HotSync procedure with the BarPilot™. There are two steps to running any InTuBars report. The first step is to select a date range for your report, and the second step is to select the specific report you wish to generate. Click on the tab marked **Step 1 – Select a date range** to get started.

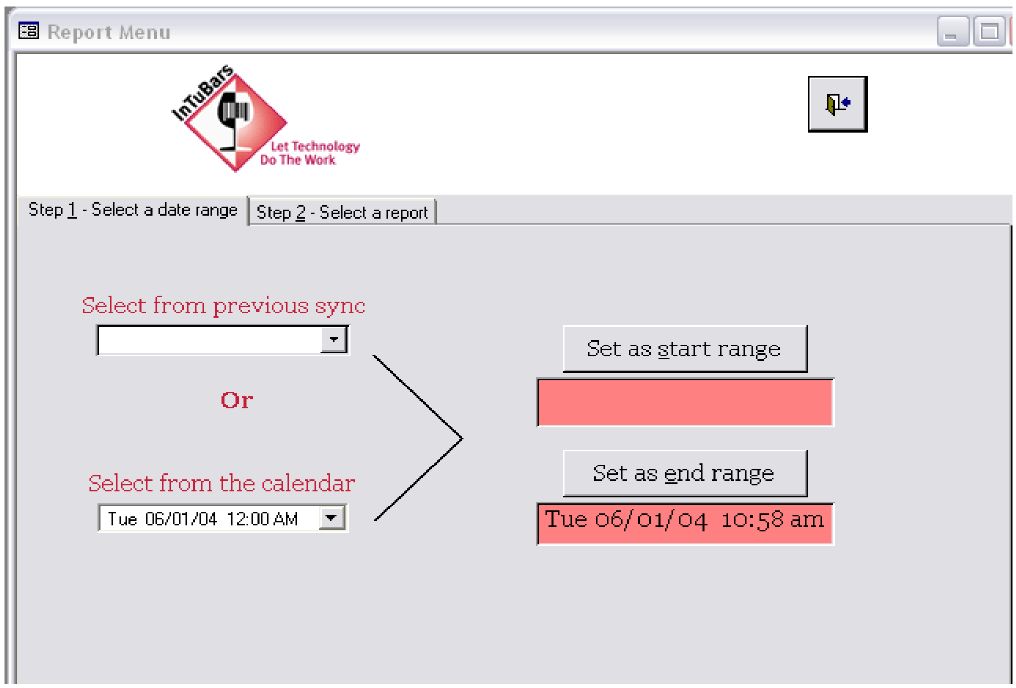


Figure 3: Reports Step 1 - Select a date range

Selecting date ranges

Selecting a previous sync or calendar date

You can select either the date of a previous sync (inventory scan), or a calendar date of your own choosing. Whichever dates you choose will determine the options for your start and end range dates for your reports.

Select from previous sync

1. Click on the arrow of the drop down menu. A list of choices will pop up.
2. Scroll down, highlight, and click on the sync date you want.

Select from the calendar

1. Click on the arrow of the drop down menu. A small calendar will pop up.
2. Use the small forward and back arrows at the top of the calendar pop-up window to locate the calendar month you require.
3. Click on the calendar date you want.

Selecting date ranges

You will need to select either previous sync dates or calendar dates for both the start and end date range.

Select start date

1. Using the previous sync or calendar procedure, choose your desired date.
2. Click on the button **Set as start range**.
3. Your desired date will appear in the start range box.

Select end date

1. Using the previous sync or calendar procedure, choose your desired date.
2. Click on the button **Set as end range**.
3. Your desired date will appear in the end range box.

Selecting a report

Once you've set your start and end range dates for your reports, you can click on the second tab, marked **Step 2 – Select a report**, to choose either to calculate your Pour Costs (PC) by product or category, or to generate one of four different reports by date range:

- purchase reports
- breakage reports
- last inventory reports
- ideal PC to usage comparison

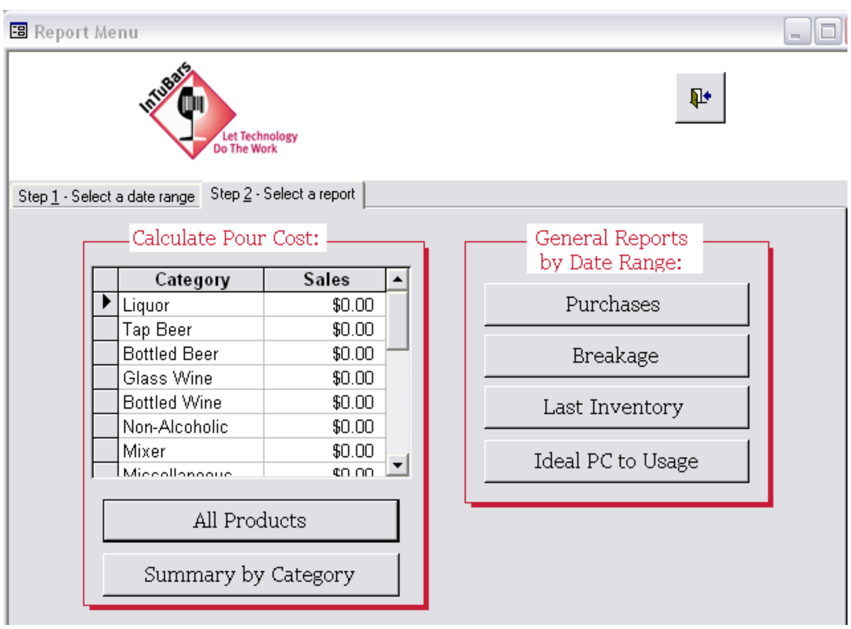


Figure 4: Reports Step 2 - Select a report

Calculating Pour Costs (PC) by product or category

The Pour Costs report can show you your PC either by individual products from specific vendors known as product lines, or by categories of products, like tap beer, bottled beer, glass wine, bottled wine, etc.

Calculating PC by product line
To calculate your PC by product line, you first need to select categories.

Figure 5: Calculate Pour Cost

To select categories:

- To choose a single category, click on the small gray box just to the left of your desired category. This will highlight your chosen category.
- To choose two or more categories, click on one category, then press and hold the **Shift**· key while clicking on the other chosen categories. Note: you will only be able to choose multiple categories that are adjacent to one another.
- To choose all categories, click on the Category title bar on the top of the left column.

Click on the button **All Products**, once you've selected the categories you want.

A report will automatically be generated that breaks down the PC on each individual product in each category. To scroll back and forth between pages, use the small left and right arrows at the left hand bottom of the screen. This report can also be printed or imported to other Microsoft Office applications using the standard MS Office icons on the top right of your screen. To return to the reports main menu, close the window.

Calculating PC by Category

You can also generate a PC report by different categories without a listing of specific product lines.

To calculate PC solely by categories:

1. Select your category or categories using the "Select Categories" procedure (see above.)
2. Click on the button Summary by Category, once you've selected your desired categories.
3. A report will automatically be generated that gives you a PC summary by categories only. To scroll back and forth between pages, use the small left and right arrows at the left hand bottom of the screen. This report can also be printed or imported to other Microsoft Office applications using the standard MS Office icons on the top right of your screen. To return to the Reports main menu, close the window.

General reports by date range

You can generate four different reports based on your previously selected date range:

- purchase reports
- breakage reports
- last inventory reports
- ideal PC to usage comparisons

In any of these reports you can scroll back and forth between pages using the small left and right arrows at the left hand bottom of the screen. These reports can also be printed or imported to other Microsoft Office applications using the standard MS Office icons on the top right of your screen. To return to the Reports main menu, close the window.

Generating purchase reports

If you wish to generate a report listing all of your current purchases within the date range previously selected, click **Purchases**. This report will list by each category the specific product lines scanned in as a purchase.

Generating breakage reports

If you wish to generate a report listing all breakage within the date range previously selected, click **Breakage**. This report will list by each category the specific product lines scanned in as a breakage.

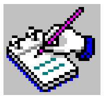
Generating last inventory reports

If you wish to generate a report that lists your entire beverage inventory on the last inventory in your date range (note: this will be the same date as your "end date",) click on **Last Inventory**. The report will list first by category and then by product line, your inventory current to the date you've selected. (If you wish to generate a report of two inventories, see Fuse last two inventories under the Utilities menu.)

Generating ideal PC to usage comparisons

If you wish to generate a report that gives you an ideal PC to usage comparison, click on **Ideal PC to Usage**. This report will list first by category and then by product line a comparison of your ideal sales versus costs, with a PC percentage total in the far right column.

Product List



Viewing and updating information in the product list

(CAUTION: Only open the product list database through the InTu-Bars™ application, NOT through Access, or you may corrupt your database file.)

The product list is a series of Access database records of all your individual products that have a bar code. When you first purchased InTuBars, you were supplied with the standard beverage inventory database, and you may have added to this database through BarPilot™ scanning procedures or through subscription updates from InTuBars. You can view or update information through the product list database itself. You can only add items to the database through the BarPilot.

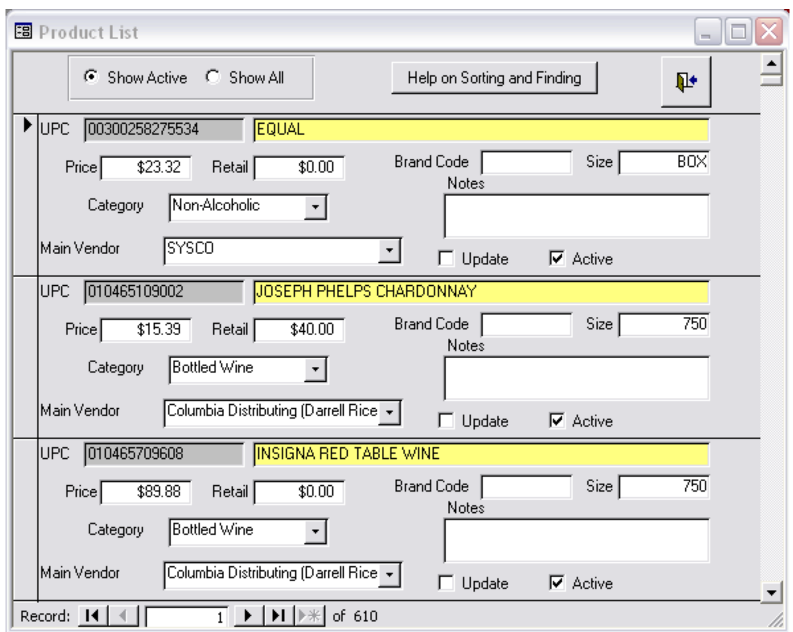


Figure 6: Product List

Viewing product list information

To view product list information:

1. Click on **Product List** from the Main Menu screen.
2. Click on **Show Active** if you wish only to view those records that are in active use in your inventory scans. Click on **Show All** if you wish to view all item records listed in the database.

3. Use the scroll bar on the right, or the left and right arrows on the bottom left of your screen, to find the record you want.
4. Click on **Help on Sorting and Finding** if you wish to locate a specific item record or records, and follow the instructions.

Updating Product list information

To update product list information:

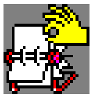
1. Click on **Product List** from the Main Menu screen.
2. Click on **Show Active** if you wish only to update a record or records that are in active (current) use in your inventory scans. Click on **Show All** if you wish to update a record or records not in active use.
3. Use the scroll bar on the right, the left and right arrows on the bottom left of your screen, or **Help on Sorting and Finding** to find the record you want.
4. Highlight the text in the specific field that you wish to update, and type in the new information.
5. Click on **Records** from the Main Menu, and then click on **Save Record** to save your new information. You can also use the keyboard to save your new record; press and hold the **Shift**· key while also pressing the Enter button.

NOTE: You will not be able to update the UPC code, and can only update the vendor code from selecting from the drop-down vendor menu.

Any product list record can also be printed or imported to other Microsoft Office applications using the standard MS Office icons on the top right of your screen.

Caution: In InTuBars™, each product list record will print on its own individual page. As the numbers of product list records in your database are likely to exceed 600 items, we suggest that you import your desired product list records to another Office application to format and then print your desired information

Vendors



The InTuBars vendors list is a series of Access database records of all of the individual suppliers of your inventory. When you first purchased InTuBars, you were supplied with the standard beverage inventory database, which included a list of all vendors that supply these items. You may have added to this database through BarPilot™ scanning procedures or through subscription updates from InTuBars. You can also enter and update your own suppliers through the Vendors section.

Viewing and updating information in the vendors database

(CAUTION: Only open the vendors database through the InTuBars™ application, NOT through Access, or you may corrupt your database file.)

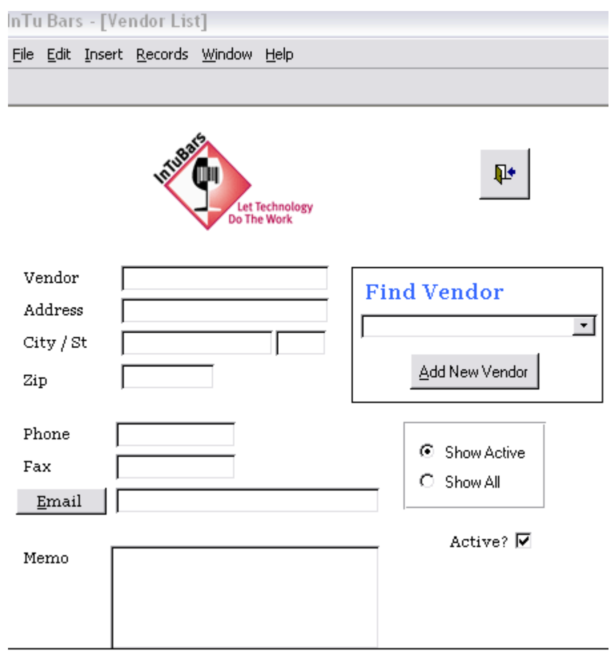


Figure 7: Vendor List

Viewing the Vendor List

To view your list of vendors:

1. Click on **Vendors** from the Main Menu Screen.
2. Click on **Show Active** if you wish only to view those item records that are in active use in your inventory scans. Click

on **Show All** if you wish to view all item records listed in the database.

3. Choose the alphabetical order in which you wish to view vendors. Use the Sort icons **(AZ or ZA)** on the top right of the screen, or select from the top menu **Record**, then **Apply Filter/Sort**.
4. Use the left and right arrows at the bottom of the screen to scroll through the vendor database records.

Note: If you select Remove Filter/Sort from the menu, it will remove your previously selected filter/sort choice.

Updating Vendor information

To update information on an existing vendor:

1. Locate the vendor whose information you wish to update.
2. Highlight the field that has text you wish to update or add, and type in the new text.

Your changes will be automatically saved into the vendors database.

Finding vendors

If you wish to find a specific vendor, select from the drop-down menu on the right side of the screen under **Find Vendor**, and click on your desired choice.

Figure 8: Find Vendor

Adding new vendors

To add a new vendor to your vendor list:

1. Click on **Add New Vendors**. The screen will clear, and you will see a blank vendor form. You can also access this blank form by selecting **Insert**, then **New Record** from the menu at the top.
2. Fill out all fields on the left side of the screen.
3. Put a click in the box on the right that asks **Active?** if the vendor will be an active vendor
4. Each vendor can have more than one record, if you have several contacts you order from at the same vendor. If this is the case, when you add a vendor, put the contact's name in parentheses after the name of the company, and then fill in the rest of the record as desired.

Your changes will be automatically saved into the database.

E-mailing vendors

To e-mail a vendor, you must first ensure that a valid e-mail address is listed in the field marked “E-mail” in the record of the vendor you wish to contact. If there is no e-mail address in this field, use the “Updating Vendor Information” procedure to enter the e-mail address.

To e-mail a vendor:

1. Locate and display the record of the vendor you wish to contact
2. Click on the **Email** button located to the left of the vendor’s e-mail address.
3. Word will automatically be opened as your e-mail editor. Type your e-mail message. Format your document as required.
4. Click on **Save** if you wish to retain a copy of your e-mail before sending the message. Saving an e-mail will automatically give it a title, as long as you’ve entered information into the Subject line.
5. Click on **Send** to send your message to your vendor. This e-mail can be managed through your configured e-mail server.

Any vendor record can also be printed or imported to other Microsoft Office applications using the standard MS Office icons on the top right of your screen.

Caution: Each vendor record will print on its own individual page, which you will not be able to format. We suggest that you import your desired vendor record(s) to another Office application to format and then print the desired information.