
10 Steps to Getting Started with Restaurant Pro Express

Your copy of Restaurant Pro Express (RPE) must be registered before use. To register your software, choose **Register** from the **File** menu at the **Login Screen**. Restaurant Pro Express will prompt you for your activation number; enter the serial number located on your RPE box.

After entering your activation number, Restaurant Pro Express will access the pcAmerica registration server over the internet to register your software.

NOTE: The registration process requires an active internet connection. If you do not have an internet connection, please contact your pcAmerica sales representative to manually register your software.

For more information see step 2 of the **10 Steps to Getting Started** section of the manual.

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10 Steps to Getting Started

Step 1 - Plug in the Equipment

The first step of setting up your point of sale system is plugging in the equipment. Some of the devices require **hardware drivers** which is what your computer uses to talk to each piece of equipment.

Step by step instructions on how to plug in your new POS hardware, peripherals and install drivers are located at:

- <http://faq.pcAmerica.com/hardware>



Pole Display

Your Pole Display allows customers to quickly and easily view their transaction as it is being entered into the system.



Cash Drawer

Store cash for the day in one safe and convenient place. RPE features an antitheft setting to only allow employees to ring in a transaction with the cash drawer closed.



Receipt Printer

Receipt printers allow your customers to have an itemized breakdown of their transaction. RPE will also enable you to place your company logo and bounce back coupon on the receipt.



Kitchen Printer

A kitchen printer is designed for speed. Orders immediately print to the kitchen and food items can be designated to print at certain stations.

For more detailed information about hardware and hardware configurations please see the **Hardware Setup** section of the manual.

Note: These are common connection arrangements. Depending on the equipment you purchased, your connection arrangements will vary.

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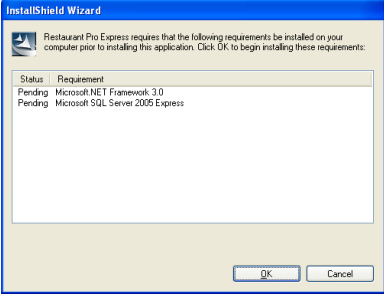
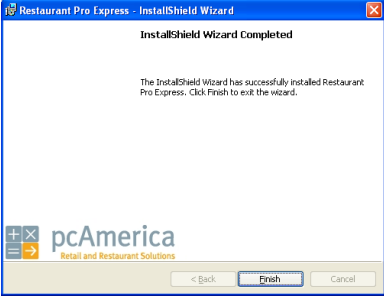
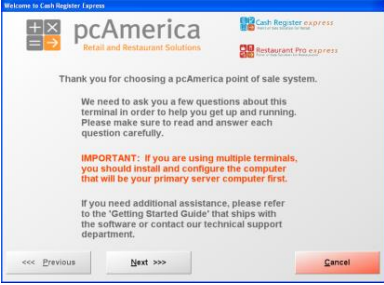
Step 2 - Install and Start Restaurant Pro Express

Below are instructions on installing Restaurant Pro Express and starting it for the first time.

You must be logged onto your computer as an Administrator with full access rights in order to properly install Restaurant Pro Express.

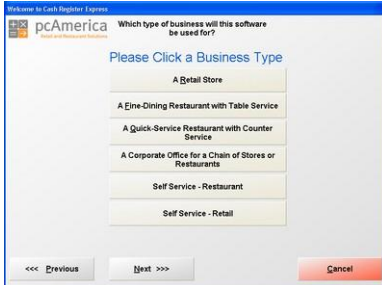
If you have multiple stations within your store, it is very important that you **install the server first!** We also recommend you read the **Configure Multiple Stations** section later in this manual.

If you have multiple stores communicating to a corporate office, it is recommended you sign up for a pcAmerica training session to ensure you fully understand the process.

	<ol style="list-style-type: none">1. Insert the Restaurant Pro Express CD into the CD-ROM drive. Before installing RPE the installer will scan for any prerequisites. Whatever is listed on this screen MUST be installed prior to the RPE install. If nothing on this screen is installed you will get prompted to select ok to install everything.
	<ol style="list-style-type: none">2. After all prerequisites have been installed the RPE installer should automatically launch and bring you to the next step.3. After the install has completed select Finish to exit the wizard.
	<ol style="list-style-type: none">4. Select Next to begin the configuration process. You will be asked a series of questions that will determine how your system is installed.

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Step 2 – Install and Start Restaurant Pro Express



5. **Restaurant Pro Express** will prompt you to select your industry type, select **A Retail Store**. Otherwise, choose **A Corporate Office for a Chain of Stores or Restaurants ONLY** IF this computer is an office computer in your corporate office (not an office computer in a retail store).



6. The next screen in the wizard will be the **Database Selection** tab.
 - Select **Configure This Computer** to start a NEW database. To connect to your server please see the **Configure Multiple Stations** section later in this manual for more information.



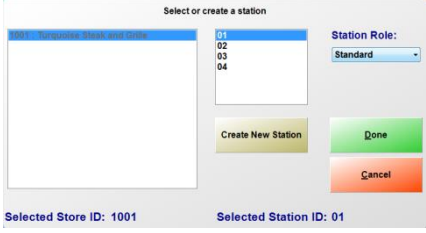
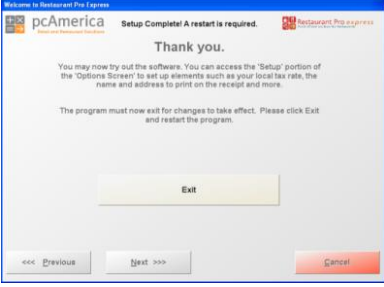


7. You will need to answer a series of questions to help configure your system properly.



8. If you are connecting more than one computer in your store to a server you must select the right server that station will be connecting to.

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Step 2 – Install and Start Restaurant Pro Express

	<p>8. To setup a Store Server you will need to choose the appropriate Store ID by highlighting it. In addition, you need to select a Station. For connecting a Station to a Store Server please see the Configure Multiple Stations section later in this manual.</p> <p>Note: Every station must have a unique number.</p>
	<p>9. After you have configured your system select either Begin or Exit and restart the program.</p>
	<p>10. In order to gain access to your new software you must now register it. Select the Register Now tab and scan or enter the registration number that came with your software. You must have an internet connection to register your software or call your customer service representative (1-800-722-6374 x278) to guide you through the manual registration process.</p>
	<p>11. If you are not connecting to a corporate office, Restaurant Pro Express will proceed to the Login Screen after a brief loading process. If you are connecting to a corporate office, you will be prompted for the corporate office information before progressing to the Login Screen.</p>

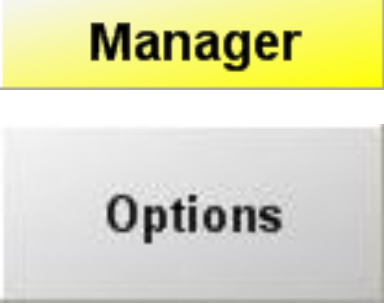

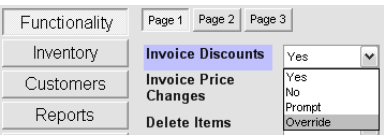
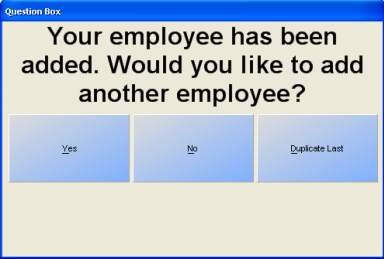
For a detailed installation guide please see the link below:

- <http://faq.pcAmerica.com/maintenance/cre-rpe-installation>

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Step 3 - Add Your Employees into the System

Employees are configured within the **Employee Maintenance** screen of Restaurant Pro Express. Cashiers and servers must be added into the system before they can log in and ring up sales. Other types of employees can be added and their hours tracked within RPE, even if their jobs don't require them to use the POS. The steps below describe how to add your initial cashier into RPE; the **Employee Maintenance** section later in this manual will describe additional employee options, job codes and how to record employee hours.

	<ol style="list-style-type: none"> 1. Select the Manager or Options button. 2. Enter the administrator password (default: admin) where applicable. 3. Select Administrative then, Employee Maintenance. Only the administrator can access this screen.
	<ol style="list-style-type: none"> 4. Select the Add Employee button to create a new employee record. Assign a unique Employee ID (which could be their initials or some other unique identifier), password and a Display Name that prints on the receipt. If you would like to assign a secure login card to this employee, swipe the card in the Card Swipe ID box.
	<ol style="list-style-type: none"> 5. Assign security permissions by selecting the dropdown list and selecting Yes (the employee can do this), No (they cannot), Prompt (they can with manager's permission) or Override (they can and are a manager for this function). <p>For more information see the Top Five Employee Permissions and Uses section of the manual.</p>
	<ol style="list-style-type: none"> 6. Select the Save button. Your employee has been added! Add any additional employees you wish to configure and then select the Exit button to go back to the Login Screen.

For a detailed guide on adding and configuring employees in RPE please see the link below:

- <http://faq.pcamerica.com/software/employees/creating-employees>

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Step 4 - Configure a Few Setup Options

Restaurant Pro Express has hundreds of built-in features that can be turned on or off. The **Setup Screen** includes many of these options, organizing them into multiple tabs. You can access the **Setup Screen** from the **Login Screen** by selecting the **File** menu and **Setup Screen** – you must use the administrator password to enter this screen (default: admin). Global settings only need to be configured once for all stations while settings that are not global need to be configured once at each station. Below is a chart of recommended feature settings:

Feature	Tab	Quick Service Restaurant	Quick Service Restaurant	Global
Prompt Cashier ID , requires a cashier to login for every check.	Invoice Settings	X		
Change the Receipt Size to Short Receipt to print only the most important information.	Receipt	X	X	
Enter the company information that prints on the receipt.	Company Info	X	X	X
Enter necessary credit card information if you are processing credit cards through Restaurant Pro Express.	Payment Processing	X	X	
Prompt Table option will either prompt for a table layout after logging in or go straight to the invoicing screen.	Restaurant Features -> Functionality	X	X	
Create text that will print on the bottom of a receipt as a coupon.	Coupons	X		
On Hold ID will allow you to choose how the On Hold ID is handled with Restaurant Pro Express.	Restaurant Features -> Functionality	X	X	
Reason Codes allow you to choose a reason why you are accepting a return.	Invoice Settings	X	X	X
Combine lines items scanned multiple times will appear on the same line item.	Invoice Settings	X	X	

You can read about the other settings and options in the **Setup Screen** in our **F1 Help Section** built into Restaurant Pro Express. You can also get detailed information about the setup screen from the link below:

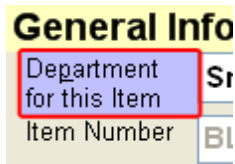
- http://faq.pcamerica.com/file-lockers/pdf-locker/Setup_Screen.pdf

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Step 5 - Create Your Inventory Items

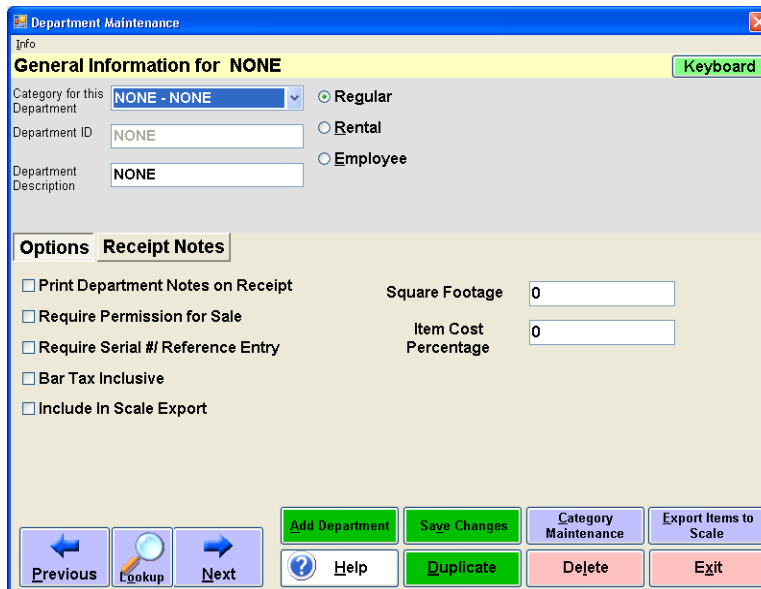
Your goods are separated into groups called **Departments**. A few examples of departments are **Appetizers**, **Desserts**, **Pastas** and **Value Meals**. Departments are used to organize your menu items on the screen and also to report on your items. After your departments are created, you may create menu items inside of each of your departments.

To begin creating your inventory list, select the **Manager** Button on the top right of the **Login Screen** and enter a username and password (default username: 01, password: admin). Navigate to the **Inventory Maintenance** screen inside of the **Administrative** tab.



To add a new department, select the blue **Department for this Item** link in the top left of the screen. This will bring you to the **Department Maintenance** screen.

Select the **Add Department** button, type in a department ID (ex: SMTH) and description (ex: Smoothies) and select **Save**. After adding the department, select **Exit** to return to the **Inventory Maintenance** screen.



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Step 5 – Create Your Inventory Items

To add a new item, select the **Add Item** button on the bottom of the **Inventory Maintenance** screen. The required information is on the top one-third of the screen:

- The **Department** this item will be inside of (ex: Smoothies).
- A unique **Item Number** (ex: SW1001, or the barcode of the item).
- A **Description**, which will print on the receipts (ex: short sleeve v-neck).
- Your **Cost**, which is the price you pay.
- The **Price you charge** the customer.
- An optional **# In Stock** value if you track stock levels.
- Various tax options can be selected, if you charge tax for this item.

Item: Blended Cappuccino		Pizza Setup	
Department for this Item	Smoothies	Avg Cost	\$1.00000 <input checked="" type="checkbox"/> Tax
Item Number	BLENDCAPP	Price You Charge	\$3.95 <input type="checkbox"/> Tax 2
Description	Blended Cappuccino	Price with tax	\$4.27 <input type="checkbox"/> Tax 3
		# In Stock	0 <input type="checkbox"/> Bar Tax

Select the **Save** button and the item will now be added to your inventory list. See the next step to change the default format of your button and customize the touchscreen with your own colors.

TIP: Most restaurants apply modifiers (such as meat temperatures, toppings, side dishes, etc.) to their items. See the following document for information on how to configure modifiers:

- http://faq.pcamerica.com/file-lockers/pdf-locker/Creating_modifiers.pdf

For a complete breakdown of all options in Inventory Maintenance please see the document below:

- http://faq.pcamerica.com/file-lockers/pdf-locker/Inventory_Maintenance_Screen.pdf

For detailed instructions on adding inventory please see the link below:

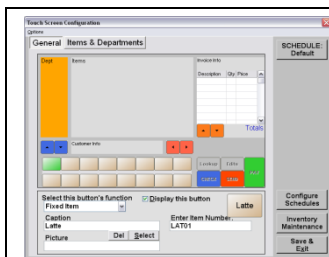
- <http://faq.pcamerica.com/software/inventory/creating-new-inventory-items>

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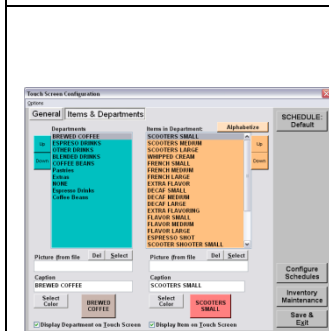
Step 6 – Configure Your Inventory and Function Buttons

The menu screen where you place your orders is a highly customizable screen. By default, menu items are displayed in the order you add them. The buttons are a default color and their configuration can be changed easily.

To change the look of your menu, and configure function buttons and best sellers, select the **Manager** Button on the top right of the **Login Screen** and enter a username and password (default username: 01, password: admin). Next select the **Setup** tab and then **Touch Screen Configuration**.



The **General** tab is used to configure the custom quick buttons on the bottom of the screen. To assign a function or a best seller to a custom button, select the button on the screen (it will highlight in green), choose the function from the **Select this button's function** dropdown and fill in the information beneath. Make sure to check **Display this Button** to display it on the screen. A popular use for a function button is for best sellers, which is a menu button that will be on the screen no matter what department you are in. To assign one, choose the function **Fixed Item** and fill in the item number in the box below.



The functions in the **Items & Departments** tab are used to change the order, color, caption and picture of your menu buttons. You can also choose to make certain items or departments invisible.

- To change the color of a department or menu item button, select the department (in the left list) or menu item (in the right list) and choose the **Select Color** button.
- Change the order of your departments or menu items by selecting them from the list and using the **Up** or **Down** buttons.

When you are finished making changes, select the **Save & Exit** button. Your saved changes will display the next time you log into the menu screen.

TIP: Changes made to the menu on one terminal automatically update ALL terminals in real time. You do have the ability to design different menus for specific terminals in your restaurant without affecting the other terminals. For example, restaurants with a bar commonly have a different menu layout at the bar than at the rest of the restaurant. To do this, select the **Configure This Station Individually** menu option from the **Options** menu on the top of the screen.

If this is checked, any layout changes made within **Touch Screen Configuration** will not affect other terminals.

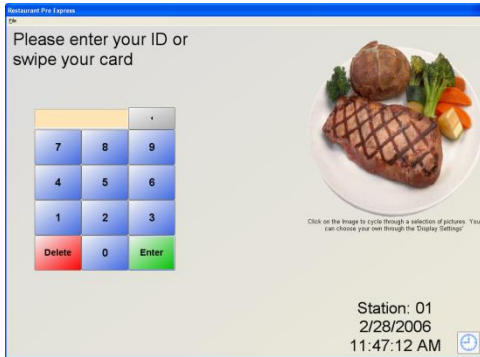
For a detailed guide on using the touch screen configuration window please see the link below:

- http://faq.pcamerica.com/file-lockers/pdf-locker/Touch_Screen_Configuration.pdf

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Step 7 - Login to the System

Servers must login to Restaurant Pro Express before they can ring up customers or enter orders. The **Login Screen** prompts servers for a user name and password, or alternatively the server can swipe their employee card to gain access.



1. To log into RPE, simply enter your ID and password (default for the demo is "01" and "admin"), enter the employees id or swipe the secure login card you configured in the **Employee Maintenance** screen.

If you are a QSR and not using the table service features of RPE, you will go immediately into the restaurant menu screen. Otherwise, you will proceed to number two below.



2. If your establishment is a table service restaurant, select the table. Your table layout can be configured to resemble your restaurant, with tables organized in different sections (ex: dining room, patio, bar) and options to vary shapes and sizes. Select the **Edit Layout** to modify your table layout from any station. Please refer to the **Laying Out Your Tables for Fine Dining and Table Service** section for instructions on configuring your tables.

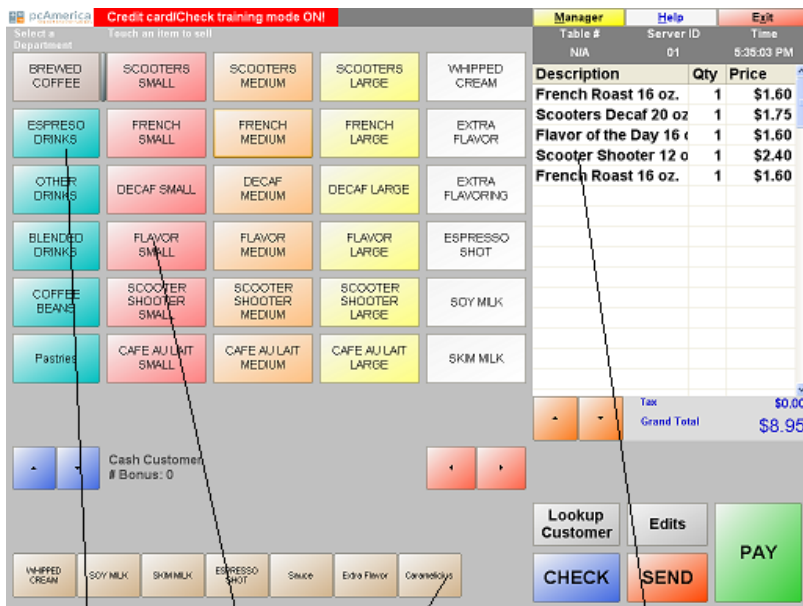


A secure login card helps prevent one server from logging in as a different server (which is a hole for theft). Without a secure login card, servers must type in a user name and password, which is visible to others close by. The only way to log in with the card is to swipe the card, protecting the server's drawer from others trying to steal money. You can purchase these cards from pcAmerica.

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Step 8 - Ring in Some Items

Ring up items is easy. Simply select the department the item is in (examples: appetizers, entrees, desserts, pastas, etc) and select the menu items to add to the check. If the item has modifiers that apply to it (such as a meat temperature for a burger) RPE will prompt the server to make the choices and then add the item to the check.



Department selection buttons

Item buttons; touch an item to add it to the order

Items ordered so far on this check with quantity & price

Custom buttons that you can use for one-touch access to our best sellers (or other commonly used functions.) For example, a coffee shop would have 'Medium Coffee', their best seller, as a one-touch button.

TIP: For table service restaurants, Restaurant Pro Express does allow you to assign each item ordered to the guest ordering it, using the **Order by Guest** features. The guest number for each item will print in the kitchen so the runner knows which guest ordered which menu items and doesn't have to "auction off food." For help turning on this feature, please refer to the **F1 Help Section**.

For detailed instructions on invoicing in Restaurant Pro Express please see the link below:

- <http://faq.pcamerica.com/software/invoicing/invoicing-in-restaurant-pro-express>

10 Steps to Getting Started

Step 9 – A Few Basic Every Day Functions

You can access additional functions by selecting an item on the menu grid. Below is an explanation of each of these buttons.



To delete one or more items, select the items (which will highlight them) and select the **Delete** button. This function can be limited using employee permissions.

To apply a discount to one or more items, select the items (which will highlight them) and select the **Line Discount %** button. You will be prompted by a discount percentage. This function can be limited using employee permissions.

If you would like to order more than one item, you can select the item and select the **Change Quantity** button. An alternate way of doing this is just selecting the menu item button multiple times. This function can be limited using employee permissions.

Modify is used to modify the modifiers that are already on an item. This function can be limited using employee permissions.

Reorder Round is commonly used in a restaurant or bar where many people want to reorder the same item they previously drank. Select the items you'd like to order and select Reorder Round, which will up the quantity by one. This function can be limited using employee permissions.

Transfer is used to transfer this check to a different table. This function can be limited using employee permissions.

Select the **Show Menu** button to deselect all the items you've selected in the menu grid and go back to the menu buttons.

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Step 10 - Complete the Transaction

Step 10 is the most important part of the transaction – accepting tender (money). The three most common forms of payment in most restaurants are cash, credit\debit cards and gift cards.



To PAY for a transaction, select the PAY button. This will bring up the amount tendered screen where you can pay using one or more payment methods.

Type	Amount	Details

Restaurant Pro Express' amount tendered screen is built for speed and flexibility. The default amount is always the exact amount remaining. To enter a payment, touch in the amount and select the payment method. If paying by gift card, credit\debit card or check, RPE will ask you for more information. You can also enable one-touch quick payment buttons for the most common tender amounts. RPE supports split tendering, meaning you can pay with more than one tender.

CHECK

To put a check on hold (for table service, or quick service where you pay at a separate counter), use the **CHECK** or **SEND** button. The check is then put on hold waiting for more items to be added or for the customer to finish their meal and pay their bill. See below for a more detailed description of these functions.

SEND

CHECK is used to print a copy of the invoice locally at your receipt printer to give to your customer (if they would like to see what they ordered).

SEND is used to send items that have been ordered to a kitchen printer (if applicable) to have your kitchen staff, prepare the ordered items.

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Step 10 - Complete the Transaction

SPLIT CHECK

In table service restaurants, some parties will ask for separate checks. To split a check the server can select **EDITS** and then **SPLIT CHECK**.

Inside of the split checks screen you can split evenly (example split 3 ways), split by guest (if using the order by guest feature) or select and drop items amongst different split check in any fashion you wish.

Split Checks

Select Items to Split, Select Check to Split to

Check# 1-\$10.05

G	Description	#	Price
	Cheese Calzor	1	\$5.75
	Pepperoni	1	\$0.25
	Coke	1	\$0.00
	Small	1	\$3.50

Check# 2-\$5.57

G	Description	#	Price
	Cherry Coke	1	\$0.00
	Medium	1	\$1.25
	Soup of the Da	1	\$4.00

Check# 3-\$7.95

G	Description	#	Price
	Diet Coke	1	\$0.00
	Medium	1	\$1.25
	Stromboli	1	\$6.25

Check# 4-\$0.00

G	Description	#	Price
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ALL GUEST NONE

Split Evenly Split By Guest Combine All Done

Congratulations! You've rung up your first sale inside of Restaurant Pro Express. You've covered the basics and can now use your new point of sale system. The remainder of this manual includes some useful information for configuring and using your Restaurant Pro Express point of sale system.