

**NCR BACK OFFICE
USER'S GUIDE**

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Introduction

This user's guide is designed to provide detailed instructions regarding NBO manager activities.

The NCR BackOffice (NBO) Program

This module identifies the various applications that are used to manage the day to day activities such as Employee Maintenance, Forecasting, Scheduling and Labor functions.

NCR BackOffice NBO is used by the manager on a daily basis. It is a complete in store back office system for managing all aspects of Purchases, Inventory Management, Cash Control, Timekeeping, and Employee/Manager Scheduling.

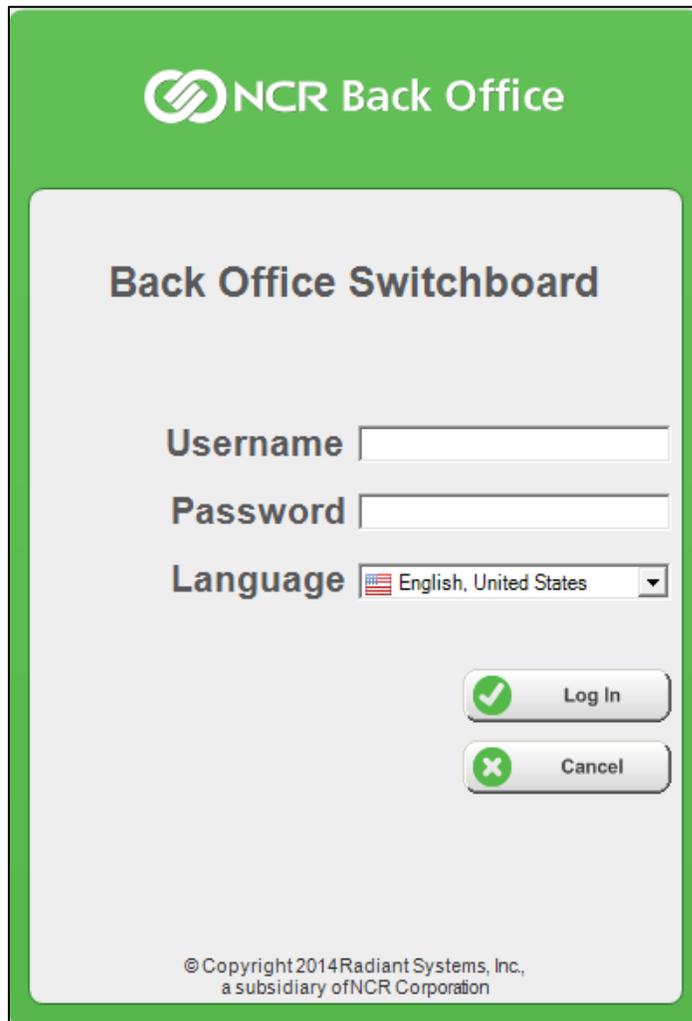
NBO requires a login name and password that is unique to each Manager. For security purposes your password should never be shared with others. Only managers and Shift Leaders should be granted access to this tool.

NBO Back Office Switchboard provides a graphical and user-friendly interface starting with a screen called a Switchboard.

Switchboards group related tasks together for ease of use providing you access to complete your daily work; clear and easy to understand menu options guide you through your various tasks.

Logging In and Out – NBO

1. From the Desktop, double-click the icon to display the NBO Log-In dialog:



The image shows a login dialog box for the NCR Back Office. It has a green header with the NCR logo and the text "NCR Back Office". Below the header is a white box titled "Back Office Switchboard". Inside this box are three input fields: "Username" with a text input field, "Password" with a text input field, and "Language" with a dropdown menu showing "English, United States". At the bottom right of the white box are two buttons: "Log In" with a green checkmark icon and "Cancel" with a green X icon. At the bottom of the white box is the copyright notice: "© Copyright 2014 Radiant Systems, Inc., a subsidiary of NCR Corporation".

2. Type your NBO user ID (your 9 digit employee ID#) in the **User Name** field.
3. Tab to the **Password** field and type your NBO password.
4. Click 

5. The first time you log into NBO you will need to set up your password.

Create New Password

Your password has been cleared by asteenbergh. Please enter your new password.

Strong passwords are enabled (?)

Password

Confirm Password

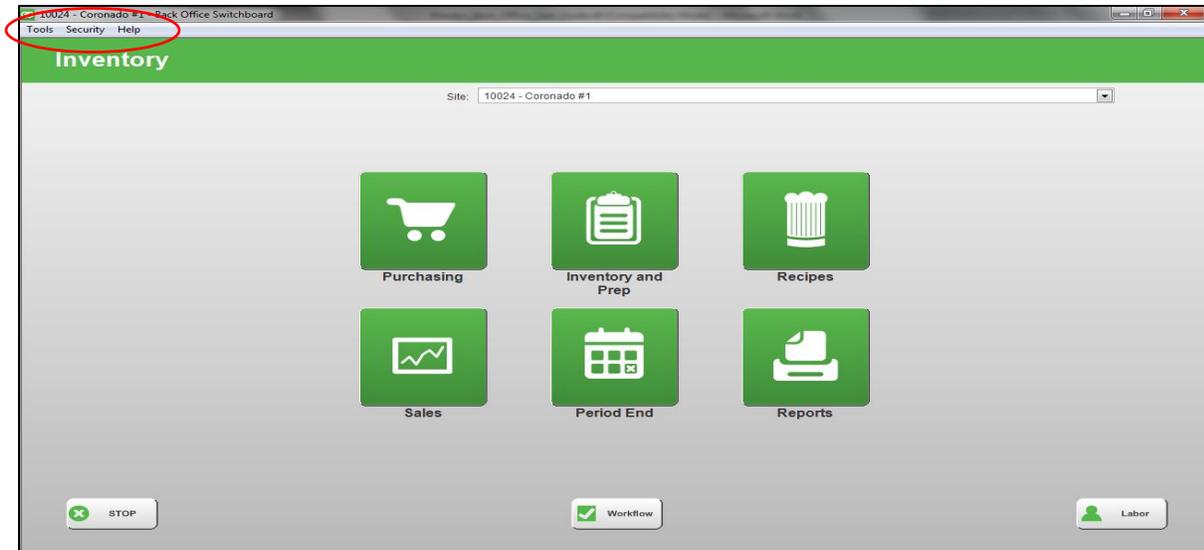
6. You will be prompted if your password does not meet the required criteria.
- For added security, you will be prompted to change the initial password at your first login. You will also be prompted to change your password every 60 days.

MenuLink Information

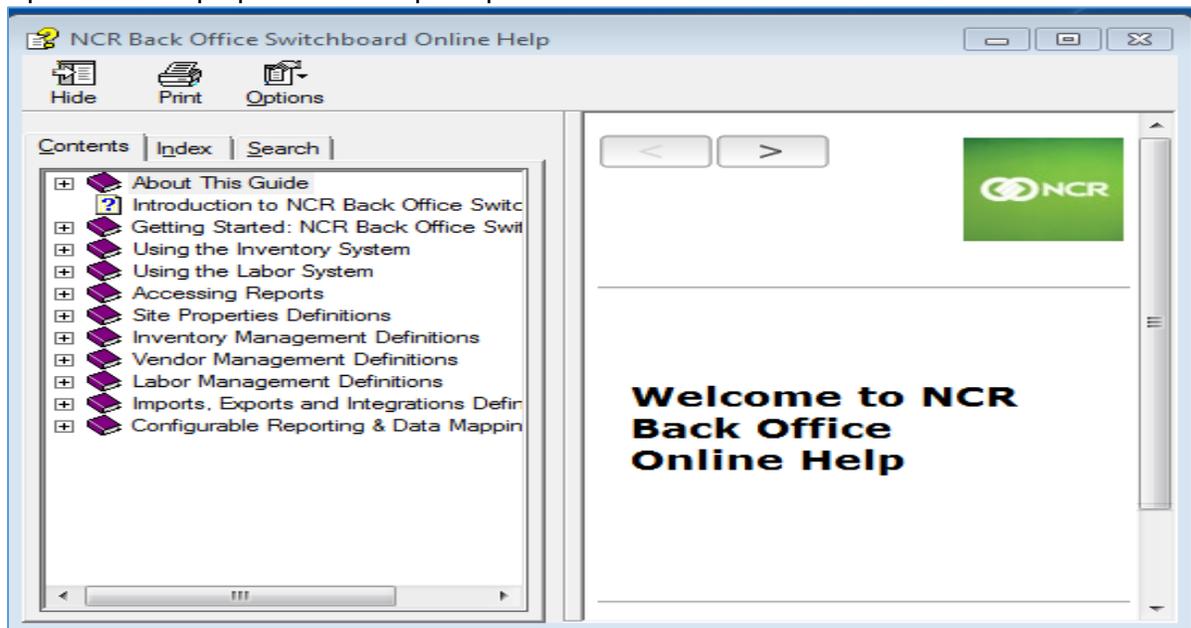
A password must be entered that meets the following criteria:

- at least 8 characters in length
- contains at least three of the following four character types:
 - uppercase letter
 - lowercase letter
 - numeral
 - special character (\$,#,%,~)

7. After you log in, NBO displays the **Main Switchboard**, which defaults to **Inventory**.
- To access the Labor Suite, click the **Labor** icon on bottom right of screen.
 - A tool bar in the top left corner of each switchboard contains easily accessible tabs for: **Tools, Security, and Help** options.



For NBO How To Questions: There is a great tutorial with self-help information in the Help>Online Help option at the top left part of the Switchboard screen.



Labor Switchboard

Employees- contains employee information

Payroll- contains time keeping and payroll related information

Scheduling- forecasting and employee/manager scheduling

Staffing- general information

Manager Tools- not used at this time

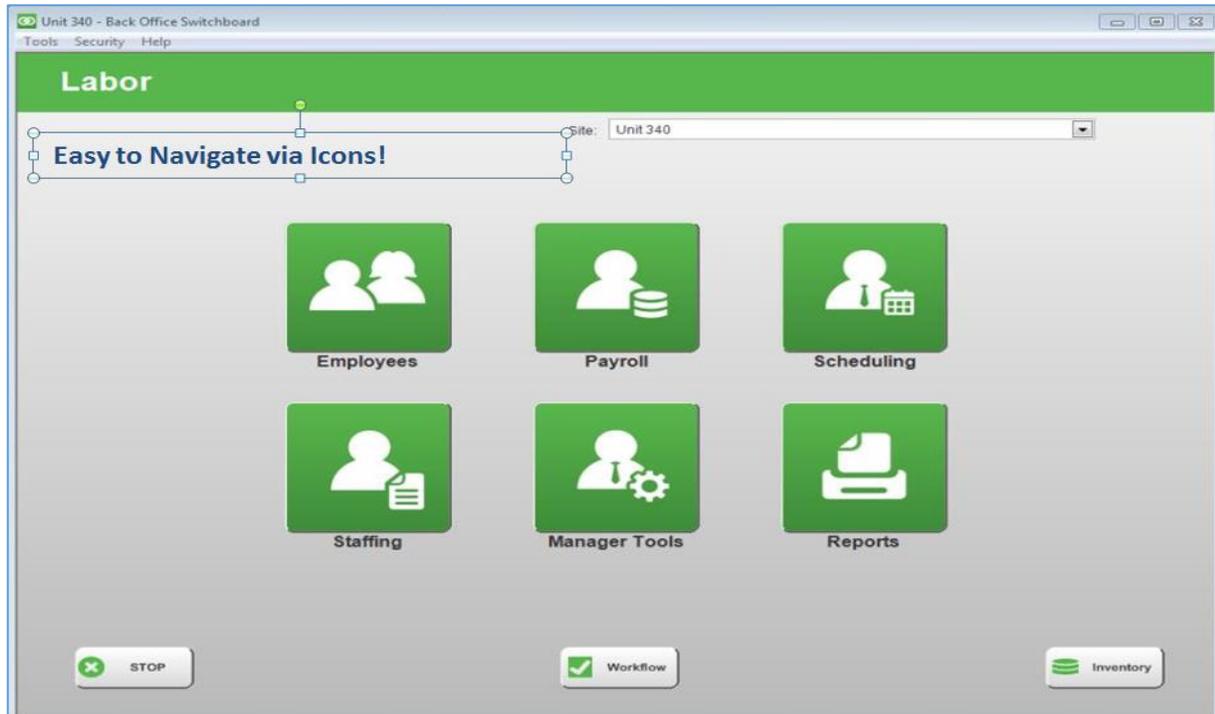
Reports- Various labor and payroll related reports

Stop- To close NBO

Workflow- Important daily/weekly tasks related to labor, payroll and other important tasks to run your restaurant.

Help- To access the NBO Online Help Guide

Inventory- To go back to Inventory Switchboard



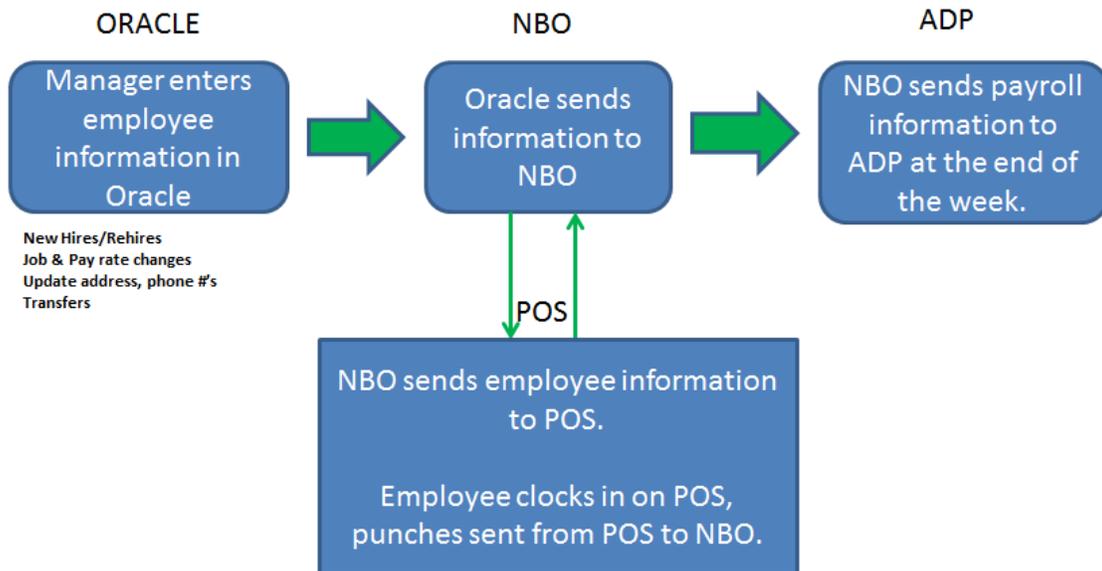
Employees

Employee Maintenance

All employee HR related information is entered/ updated by the manager in Oracle. Oracle sends the employee information to NBO. NBO will send employee information to the POS system.

Example of Oracle HR information:

- New Hires/ Re-hires
- Job and pay rate changes
- Address and phone # changes
- Transfers
- LOAs



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Employee Profile

To view employee profile information in NBO, do the following:

- 1. Select Labor
- 2. Select Employee
- 3. Select Employee Maintenance
- 4. Select Employee Name

Employee Tab-Name, Employee #, Contact Information

Emergency- If emergency contact information was entered in Oracle, this would be displayed here.

Status- Active or Inactive, Schedule Group, Employment Type, FT/PT Status Type

Job Code- Job Code assigned to the employee

Point of Sale- POS Access level information

Custom Fields- Send Employee to POS

PTO Hours - Remaining information for Managers

Employee - Profile

<u>Employee</u>	<u>Emergency</u>	<u>Status</u>	<u>Jobcode</u>	<u>Point of Sale</u>	<u>Custom Fields</u>
Employee ID:	Last Name:				
100340046	Brandon				
Current Jobcode Rates					
Jobcode Name					
▶	Team Member - Server				
	FOH Trainee				

Employee Central

To view employee information for all of your employees in NBO, you can do so by selecting Employee Central on the Labor switchboard:

1. Select Labor
2. Select Employees
3. Select Employee Central



You can drill into any information [underlined and blue](#) in Employee Central.

Unit 340		Employee Central					Start Date:		End Date:	
										
		Special Days			Contact Info		Hours			
Name ▲	Status Type ▼	Birthdate ▼	Hire Date ▼	Years of Service ▼	Phone/ Text	Email Address ▼	Actual ▼	Remaining ▼		
0340_Inventory	PT	01/01	03/23	2 Months		Unit_340@bobevans.com	0.00	0.00		
226Expo_Elvis	PT	02/22	03/01	1 Year 2 Months			0.00	0.00		
226Host_Howard	PT	02/22	03/01	1 Year 2 Months			0.00	0.00		
226Server_Abby	PT	02/22	03/01	1 Year 2 Months			0.00	0.00		
Adams_Joshua	FT	06/09	04/07	10 Years 1 Month	4192104316		27.67	7.00		
Arenas Estrada, Karei	FT	11/14	07/12	11 Years 10 Months	6148685935		28.84	8.00		
					6143975317					
^b Baker, Phillip	FT	08/28	09/17	8 Months	614-420-4875		38.84	0.00		
Baltierra, Christina	PT	09/05	01/09	4 Months	6143904245		18.11	7.43		
Barnett, Odario	PT	^m 02/02	02/27	3 Months	614-596-9391		10.43	5.75		
Behn, Emman	PT	10/15	10/27	1 Year 7 Months	6143167847		20.00	6.00		
					6144778683					
Beneloueddah, Mharr	PT	01/01	03/17	2 Months	614-806-4169		19.63	0.00		
Bennett, Melissa	PT	08/12	09/01	7 Years 8 Months	7409759628		19.37	14.60		
					7409759628					
Buckerfield, Patricia	FT	07/15	07/29	9 Years 10 Months	6143136874		22.18	13.75		
Bulger, Brittany	PT	05/22	04/16	2 Years 1 Month	6148064391		15.18	3.75		
Burks, Rusti	PT	07/19	05/18	3 Years	5672322619	†	0.00	6.75		

^b Borrowed Employee † Employee uses My Schedule
^{*} Employee Has Hours at Multiple Stores ^m Employee is a Minor

Sending Employee Updates to POS

In order to send new/updated employee information from NBO to POS for same day use, the manager must manually send the update from NBO to the POS. If the manager does not perform this step, NBO will naturally update the POS with the employee's information overnight for the next day.

To send new/updated employee or manager information from NBO to POS:

1. Enter Employee Information in Oracle.
2. Oracle updates NBO every 15 minutes.
3. Select **Labor**.
4. Select **Employees**.
5. Select **Employee Maintenance**.
6. Verify Employee is in NBO.
7. Select Employee's Name.
8. Select **Custom Fields Tab**.
9. In the Send Employee to POS field, type in "new" or some other letter or word if new is already there (ex. new is displayed, type in "new 1", "new 2" etc).
10. Select **Save** button.
11. NBO will now send the new/updated employee information to the POS system for immediate use. The employee/manager can now clock in, out, use the POS.
12. If you experience any issues, please contact the Help Desk for assistance.

The screenshot shows a web interface titled "Employee - Profile". At the top, there is a navigation bar with several tabs: "Employee", "Emergency", "Status", "Jobcode", "Point of Sale", and "Custom Fields". The "Custom Fields" tab is currently selected and highlighted in green. Below the navigation bar, there are two input fields. The first field is labeled "PTO Remaining" and is currently empty. The second field is labeled "Send Employee to POS" and contains the text "new".

Assigning Managers/Shift Leaders to Manager Schedule Group

In order to schedule a Manager or Shift Leader on the Manager Schedule, you must first assign the manager or Shift Leader to the Manager Schedule Group.

To assign a Manager or Shift Leader to the Manager schedule group:

1. Select **Labor**.
2. Select **Employees**.
3. Select **Employee Maintenance**.
4. Select **Manager/SL Name**.
5. Select **Status Tab** in their Employee Profile.
6. Update Schedule Group to **Manager**.
7. Select **Save**.
8. The SL/manager's name will now be visible on the manager's schedule.
9. To remove a SL/manager name from the manager's schedule, simply remove them from the Manager schedule group in the Employee Profile.

Employee - Profile

Employee	Emergency	Status	Jobcode	Point of Sale	Custom Fields
Employee ID:	Last Name:				
100701585	Bain				
User:	Jeff Bain (100701585)				
*Employment Status:	Active				
Employment Reason:	Active				
Status Reporting Date:	5/17/2016				
*User Level:	Manager				
Schedule Group:	Manager				
*Payroll Code:	032341				

Borrowing Employees/Managers

Employee Borrowing

To borrow an employee/manager from one restaurant to another:

1. Oracle: Home Restaurant must process borrow in Oracle the day (or before) the borrowed employee/manager can work, clock in/out on the POS, ring orders, perform manager functions, etc. Oracle updates NBO ~every 15 minutes.
2. Check NBO: Once borrowed by the home restaurant in Oracle, the employee will be visible in the borrowed NCR Restaurant's Employee Maintenance screen in NBO (**Labor>Employees>Employee Maintenance**).
3. Update POS: Borrowed Restaurant will need to update the POS so the employee can clock in/out, use the POS, assign biometrics, etc. for their shift:

To Send Employee Update the Aloha POS:

1. Log into NBO.
2. Select **Workflow**.
3. Select the '**Same Day Employee Borrow**' workflow- this will allow the borrowed employee to clock in/out and use the POS the same day they are borrowed.
4. **Important!! This workflow will bring down your POS for several minutes, so pick the appropriate time to do so.** This is needed to update your POS so the borrowed employee/manager can clock in and use the POS system.
5. Select **Run** to run the workflow.
6. Manager can now assign biometrics to the borrowed employee.
7. Borrowed employee can clock in and use the POS.
8. The home restaurant has total control over jobs and pay rate information; this information cannot be changed by the borrowed restaurant.

Once the borrowed employee/manager is processed by the home restaurant in Oracle; the borrowed employee information appears in NBO in **Labor>Employees>Employee Maintenance**. Select the employee to see home store job information, if needed.

Employee Maintenance Include Inactive Employees
 Missing Required Information

Search for

Last Name	First Name	Employee ID	Home Site Name	Home Site ID
Clouse	James	100163762	Unit 340	340
Delgado	Liza	100340027	Unit 340	340
Disbennett	Walla	100163838	Unit 416	416
Dodd	Kaitlyn	300031161	Unit 340	340



Select **Workflow** to send the employee information to the POS

Labor Site:

Employees

Payroll

Scheduling

Staffing

Manager Tools

Reports

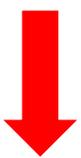


Select the **Same Day Employee Borrow** workflow.

Workflow Selection

Search for

Name	Description	Number
▶ 9. Same Day Employee Borrow	Run 15 minutes after borrowing in Oracle.	1004233
CURRENT DAY IMPORT	CURRENT DAY IMPORT	5647
END OF WEEK WORKFLOW	END OF WEEK WORKFLOW	6138
EOD WORKFLOW	EOD WORKFLOW	1003568
MID WORKFLOW WORKFLOW	MID WORKFLOW WORKFLOW	1003569
OPENING SHIFT WORKFLOW	OPENING SHIFT WORKFLOW	6131
PURCHASE WORKFLOW	PURCHASE WORKFLOW	6130



Employee Transfers

To transfer an employee/manager from one restaurant to another:

1. Oracle: The employee/manager's Home Restaurant must process the transfer in Oracle before the transferred employee/manager can work at their new restaurant, clock in/out, use the POS, etc. Oracle updates NBO ~every 15 minutes.
2. Check NBO: Once transferred by the home restaurant in Oracle, the employee/manager will be included in the new restaurant's Employee Maintenance screen in NBO (Labor>Employees>Employee Maintenance).
3. In the event the transferred employee/manager is starting work at their new restaurant the same day the transfer was processed, see steps below, otherwise the employee information will naturally update from NBO overnight in the POS the next day.

To update the POS:

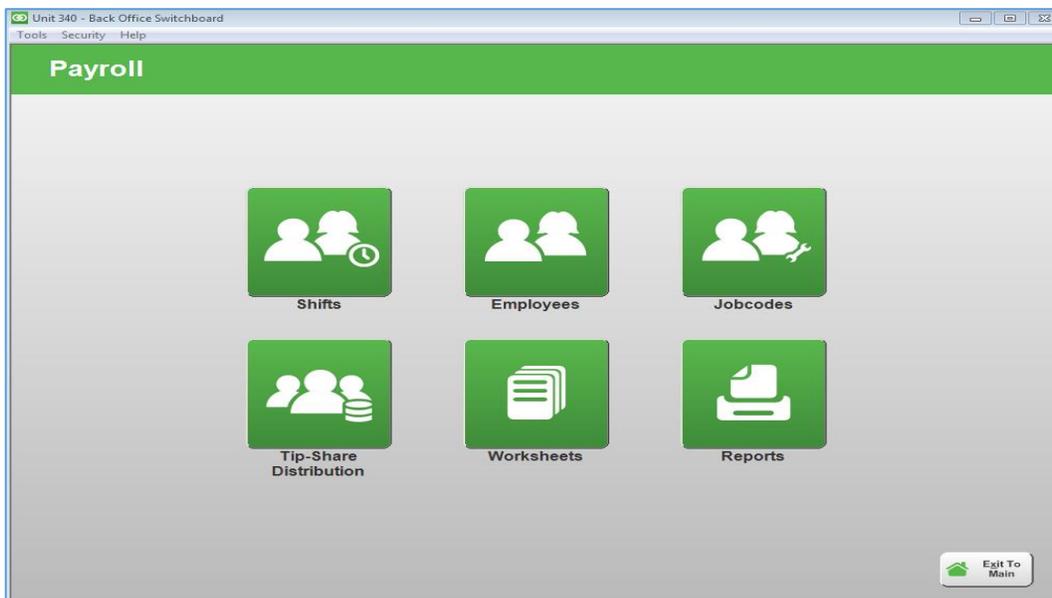
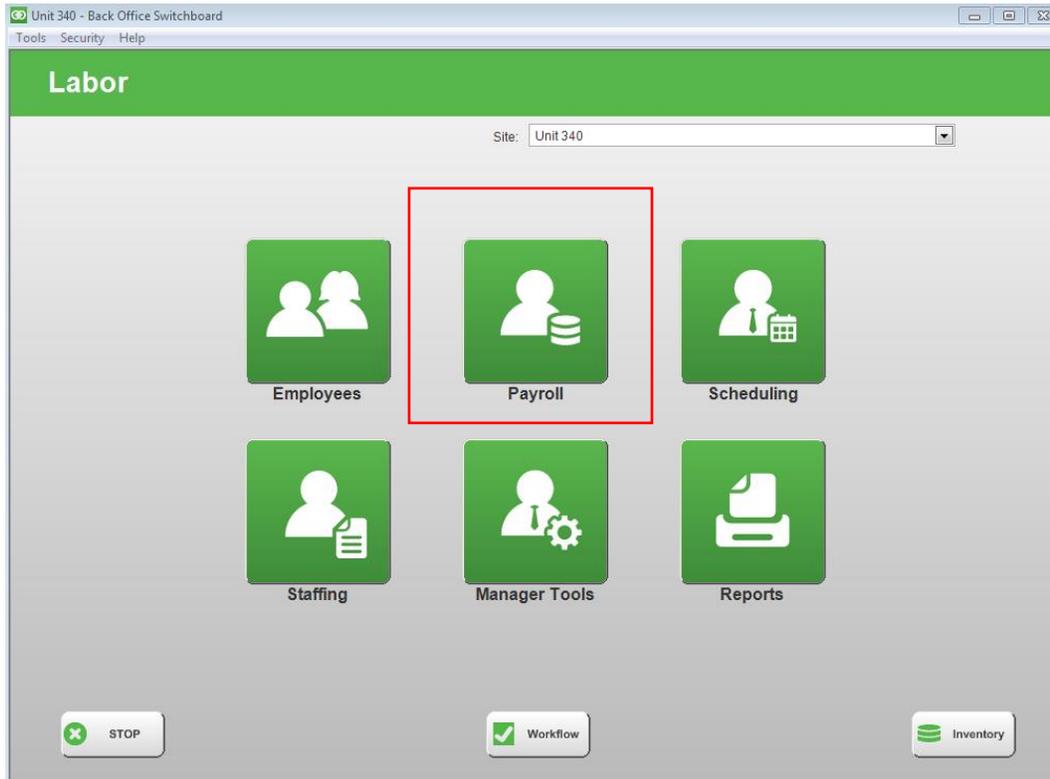
1. Log into NBO, Select **Employees**.
2. Select **Employee Maintenance**.
3. Select the Transferred Employee's/ Manager's name.
4. Select **Custom Field** tab.
5. Type in "new" or other letter or word if new already exists in the '**Send Employee to POS**'.
6. Select **Save**.
7. Transferred employee/manager is now updated in POS, can clock in/out, use POS, etc.
8. If you experience any issues, please contact the Help Desk.

The screenshot shows the 'Employee - Profile' form with the following elements:

- Tabbed interface with 'Employee', 'Emergency', 'Status', 'Jobcode', 'Point of Sale', and 'Custom Fields' (highlighted in green).
- A 'PTO Remaining' field with an empty input box.
- A 'Send Employee to POS' field containing the text 'new', with a red arrow pointing to the input.

Payroll

The Payroll function in the Labor Switchboard allows you to manage employee hours for payroll purposes. Here you can edit the employee's worked hours, add Weekly Non Worked hours such as PTO or other types of pay adjustments.



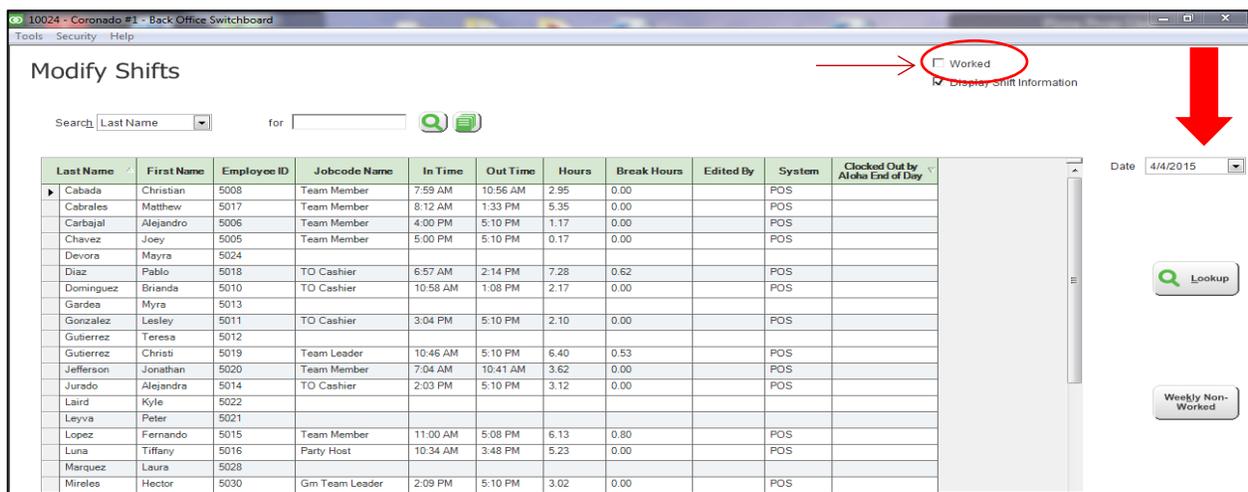
Editing Employee Time Punches

In Payroll use the **Shifts** feature to access an employee's time clock information for a selected day within the current pay period. Only previous day clock in and out information can be edited through NBO. Current day clock in and out adjustments must be performed directly on the POS terminals.

Editing previous day Time Clock Information in NBO

1. From Labor Switchboard, select **Payroll** button.
2. Select **Shifts** button.
3. The **Modify Shifts** screen will appear.

NOTE: The **Worked** option indicates will display employees that worked on the selected day. Unselect the **Worked** option to see all employees.



4. Select the **Date**: Business Date cannot be current day, but any prior day that current week.
5. Select the name of the employee and click **Lookup** (or double-click directly on the employee's name in the Shifts screen).
 - This opens the **Adjust Shifts** screen.

In the **Adjust Shifts** window, you can modify an existing shift or add a new shift if needed by selecting **Edit** icon.

Adjust Shifts

100086417 Ford, Amber Business Date 5/23/2016

Time Clock Punches
 Print Confirmation Report

Jobcode Name	In Time	Out Time	Hours	Break Hours	Reason	Edit	Edited By	System
▶ Team Member - Server	6:58 AM	1:50 PM	6.87	0.00				POS
* [Empty]								



Shift Details

Ford, Amber Business Date 5/23/2016

Reason [Dropdown]

Notes [Text Area]

Jobcode Team Member - Server [Dropdown] Clock In 6:58 AM Clock Out 1:50 PM

Break	In Time	Out Time	Hours
* Unpaid			

Make the appropriate adjustments to time, jobs, breaks, etc.
 Enter the audit reason for the change and any additional notes that are needed.

Tips

Declared Tips in NBO is the total of all cash and credit tips.
 Declared Tips must at least total the Charge Tips total.
 Tips are assigned to the job the employee worked.

NOTE: It is advised that any time punch or tip adjustments that need to occur; the manager should make those adjustments out front on the POS the day they occur.

Clock Out EOD at 2am

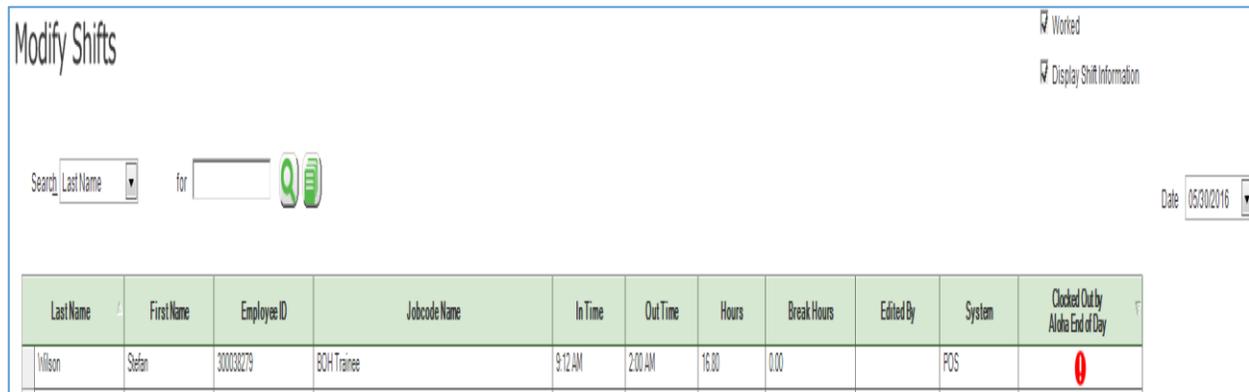
If an employee/manager does not clock out at the end of their shift, the NCR system will clock out the employee/manager at 2am that day.

Daily & Weekly Workflows have been created to check for and remind the manager to verify all employees/managers have clocked out at the end of their shifts.

In the event, an employee/manager did not clock out, and was clocked out at 2am. If not corrected, this could have a costly impact on the restaurant's labor costs.

Any employee that was clocked out at 2AM will be displayed on the top of the Shifts screen for that day with a **red !** in the far right column- Clocked out by Aloha End of Day; the employee's out time will be show as being clocked out at 2AM.

To resolve, the manager would select the employee's name and edit the out time of the shift.



The screenshot shows the 'Modify Shifts' interface. At the top right, there are two checked checkboxes: 'Worked' and 'Display Shift Information'. Below these, there is a search area with a dropdown menu for 'Last Name', a text input for 'for', and a date selector set to '06/30/2016'. The main part of the interface is a table with the following data:

Last Name	First Name	Employee ID	Jobcode Name	In Time	Out Time	Hours	Break Hours	Edited By	System	Clocked Out by Aloha End of Day
Wilson	Stefan	300030279	BOH Trainee	9:12 AM	2:00 AM	16.00	0.00		POS	!

Tips in NBO

Sales & Tip Amounts are sent each day at EOD from the POS to NBO.

Sales & Tip Amounts cannot be edited in NBO; they must be edited, checks split/re-assigned/transferred, etc. on the POS the day this occurs.

At the bottom of the screen you will see Declared Tips and Credit Tips

Declared Tips=Cash Tips + Credit Tips

Tip amounts in NBO are assigned to the job the employee worked when they received the tips

If you need assistance with adjusting/re-assigning tip amounts, please contact Payroll Services.

300038008 | Michell, Logan
Business Date: 05/30/2016

Time Clock Punches

Print Confirmation Report

Jobcode Name	In Time	Out Time	Hours	Break Hours	Reason	View	Edited By	System
Team Member - Server	4:16 PM	10:33 PM	6.28	0.00		View		POS
*						View		

Payroll Hours

Regular Daily: 7.28 Regular Weekly: 29.74
Overtime Daily: 0.00 Overtime Weekly: 0.00

Non-Worked

Jobcode Name	Pay Adjustment	Hours	Edited By
*			

Sales and Tips

Jobcode: Team Member - ▼

Declared
Tips

\$25.97

Charge
Tips

\$14.97

Tip Share
Earned

\$0.00

Sales

\$282.17

Guests

0

Other
Earnings

\$0.00



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Weekly Non-Worked Hours

PTO and Other Pay Adjustments

Within the Weekly Non Worked Hours function (located inside Shifts) you can edit the employee's worked hours, add non-worked hours to account for occurrences such as PTO or other types of pay adjustments Prior Week Adjustments can be added for each individual day or by week.

The types of pay adjustments that can be entered in Weekly Non Worked Hours:

PTO- Used to pay PTO for hourly management (AGMs, AMs, and MIT's).

PRG- Prior week hours pay of hourly management and non- management employee's

BRV- for Bereavement pay

JURY- for Jury Duty pay

For more specific guidance and requirements on PTO refer to your PTO resource and policy information in the Bob Evans Restaurant Operations Manual under the PTO topic.

For more specific guidance and requirements on Bereavement & Jury Duty pay, refer to your Employee Handbook.

Adding Non-Worked Hours

1. Log into **NBO>Select LABOR>Select Shifts>Select Date.**

2. Select Weekly Non-Worked.

Unit 340 - Back Office Switchboard

Tools Security Help

Modify Shifts

Worked
 Display Shift Information

Search: Last Name for

Date: 9/4/2015

Last Name	First Name	Employee ID	Jobcode Name	In Time	Out Time	Hours	Break Hours	Edited By	System
Bulger	Brittany	100142657							
Burks	Rusti	100103943	Server	8:58 AM	1:00 PM	4.03	0.00		POS
Cantor-Wagner	Andrew	100647061							
Cashier	Cashier	993							
Chambliss	Eugenia	100467192							
Clouse	James	100163762							
Cole	Niaja	300011026							
Curtis	Brooke	100082461							
Dallas	Stacy	100407068							
Davis	Karlina	100181240							
Delgado	Liza	100340027	Kitchen Prep	5:35 AM	1:00 PM	7.42	0.00		POS
Dickson	Amanda	100115484	Shift Leader	8:59 AM	9:00 AM	0.02	0.00		POS
Dickson	Amanda	100115484	Server	9:00 AM	1:00 PM	4.00	0.00		POS
Ferguson	Tenika	700511727	Server	9:05 AM	1:00 PM	3.92	0.52		POS
Floyd	Michelle	100348092	Asst. Manager	5:35 AM	1:00 PM	7.42	0.00		POS
Ford	Jeremy	100142331							
Foster	Chad	100178910							
Garrison	Marjorie	100149005							
Garvin	Kym	100146053							
Goelz	Mary	100157104							
Graley	Gracyn	100144436							
Gresko	Rob	998							
Haley	Aisha	100133549	Carryout	9:59 AM	1:00 PM	3.02	0.00		POS
Hampton	Gerri	100340217	Server	8:17 AM	1:00 PM	4.72	0.55		POS

Buttons: Lookup, Weekly Non-Worked, Exit To Main, Exit To Previous

3. Select Employee/Manager Name from the drop down.
4. Use the Tab button on your keyboard to tab over to business date.
5. Business Date: Enter in up to yesterday's date in the current week.
6. Select Job Code.
7. Select Pay Adjustment Type.
8. Enter in Amount of Hours.
 - PTO can be added in increments of 0-10 hours per day.
 - If there are multiple days of PTO for a manager, you can either enter the hours for each individual day of PTO by business date or use the Multi Day Calculator. See instructions for the Multi Day Calculator on the next page.
9. Select **SAVE** to complete the transaction.

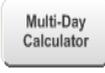
Unit 340 - Back Office Switchboard

Tools Security Help

Weekly Non-Worked

Pay Week Starting Date: Pay Week Ending Date: 

Employee Name	Employee ID	Business Date	Jobcode	Pay Adjustment	Hours	Dollars	Edited By	Created On
Baker, Phillip	300020401	5/23/2016	Assistant Manager	PTO	10.00		jeast	
* <input type="text"/>	<input type="text"/>							

Using the Multi Calculator

If there are non-worked hours for multiple days in the current week that need to be entered for an employee/manager, these can be entered using the Multi Day Calculator (for example a manager is on PTO for the entire week, 5 days, 50 hours).

To use the Multi Day Calculator:

1. Log into NBO
2. Select Labor
3. Select Payroll
4. Select Shifts
5. Select Weekly Non Worked
6. Select Multi-Day Calculator

Weekly Non-Worked

Pay Week Starting Date: Pay Week Ending Date:

Employee Name	Employee ID	Business Date	Jobcode	Pay Adjustment	Hours	Dollars	Edited By	Created On
*								



Enter the following information:

Employee Name: Select Employee/Manager name

Job Code Name: Select Job Code

Pay Adjustment: Select Pay Adjustment type (in this case PTO)

Total Hours: Enter in the Amount of Hours (in this case 50 hours for the current week)

Business Date: Select date for the beginning of the current week

Number of Days: (in this case 5 days of PTO) 5 days at 50 total hours=10 hours of PTO per day for the current week

Select **OK**

Select Cancel if you make a mistake and need to start over.

Multi-Day Non-Worked

Employee Name:

Employee ID:

Jobcode Name:

Daily Distribution

Pay Adjustment:

Total Hours:

Total Dollars:

Business Date:

Number of Days:

Pay Week

Pay Week Starting Date:

Pay Week Ending Date:

Daily Distribution Preview

Business Date	Distribution Amount

After Selecting OK, the information will populate, review for accuracy.
 Select **Save** to finalize your changes.

Any Weekly Non Worked Hours added to an employee/manager can be seen in the 1.46 Payroll with Non –Worked Hours report in NBO. (Labor>Reports)

Weekly Non-Worked

Pay Week Starting Date: Pay Week Ending Date:

Employee Name	Employee ID	Business Date	Jobcode	Pay Adjustment	Hours	Dollars	Edited By	Created On
English, Troy	100375851	5/19/2016	Assistant General	PTO	10.00		jeast	
English, Troy	100375851	5/20/2016	Assistant General	PTO	10.00		jeast	
English, Troy	100375851	5/21/2016	Assistant General	PTO	10.00		jeast	
English, Troy	100375851	5/22/2016	Assistant General	PTO	10.00		jeast	
English, Troy	100375851	5/23/2016	Assistant General	PTO	10.00		jeast	
*								

Multi-Day Calculator

Save

Exit To Main

Exit To Previous

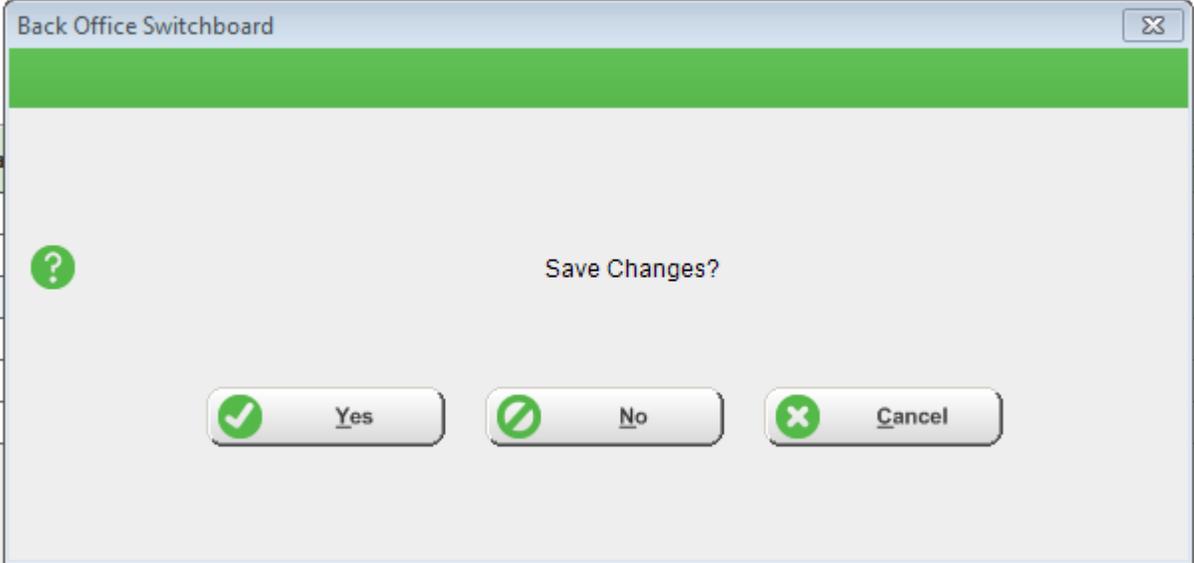


If you made a mistake select **Exit to Previous**. Then Select **NO** to start over.

Back Office Switchboard

Save Changes?

Yes No Cancel



Scheduling Process

In order to write a great schedule for perfect shifts every day, the restaurant forecast must be accurate and the restaurant must be staffed appropriately with well- trained employees.

Use your Staffing Calculator weekly/monthly and have regular conversations to review and anticipate staffing needs with your management team and Director of Operations.

The company's scheduling process and procedures are a 5 step process:

1. Forecasting: GM reviews/verifies forecast, makes any needed changes as needed.
2. Entering/Updating Availabilities & Time-Off Requests
3. Creating a Schedule that meets the business needs
4. Executing the Schedule for Perfect Shifts
5. Reporting/Measuring Results

Scheduling Standard Operating Procedure

Schedules are to be completed using the 5 step process as outline above.

The schedule must be completed, published, and posted on the schedule board for employees a minimum of ~2 weeks out.

Schedules are to be completed in NBO each week by the GM or designated scheduling manager. If another manager other the GM is doing the schedules, the GM must review and approve before publishing the schedule.

Reminders regarding the scheduling process have been built into the Scheduling and other workflows.

Recommended Success Routine for Scheduling

Thursday mornings- System generates forecast for upcoming schedule period 2 weeks out. GM reviews forecast, makes any needed changes to the forecast for that week.

Thursday/Friday- GM copies schedule from previous week. Makes adjustments based on forecasted business and recommended staffing levels. Complete and publish schedule (2 weeks out) by EOD Friday. Post completed schedule on schedule board at the restaurant.

Forecasting

NBO automatically forecasts sales each week. The forecast is based on the last 6 weeks of historical sales and guest count information for your restaurant. Recommended Labor Deployment, Recommended Ordering and Daily Suggested Prep is determined by your Forecasted Sales & Guests.

The NCR Forecast will not account for upcoming holiday periods, seasonal shifts in business or local events that affect business. The GM will have to adjust the forecasted sales and guest counts for those.

The Forecast directly influences Employee Scheduling, Recommended Food Orders, and Suggested Daily Prep.

It is critical the GM review their forecast for the upcoming schedule period to ensure it accurately reflects the expected business for that week. Workflows have been built to remind you of this important task.

To Review/Adjust the forecast:

1. Log into NBO

2. From the **Inventory Switchboard** screen, select  **Sales**.

- The Forecast can also be accessed from the Labor Switchboard>Scheduling.

3. Select **Forecasting** 

Forecasting

Forecast Options

Start Date	End Date	Period	Week	Fiscal Year
2/25/2016	3/2/2016	11	2	2016

Select Data Source: Current Year

Number of weeks back to use for calculations:

Sales/Guests: Sales Mix:

Daily Forecast Amounts

Sales Date	Day	Sales	LY Same Day Sales	Guests	Forecasted
02/25/2016	Thursday	\$4,169	\$4,240	394	02/11/2016
02/26/2016	Friday	\$5,000	\$5,448	450	02/20/2016
02/27/2016	Saturday	\$5,826	\$8,278	528	02/11/2016
02/28/2016	Sunday	\$5,900	\$5,652	512	02/20/2016
02/29/2016	Monday	\$3,500	\$4,052	301	02/20/2016
03/01/2016	Tuesday	\$3,600	\$5,609	301	02/20/2016
03/02/2016	Wednesday	\$3,975	\$4,399	315	02/20/2016
		\$31,970	\$37,678	2,801	

Forecast is tied directly to the restaurant's:

Recommended Ordering

Suggest Prep

Employee Scheduling/
Labor Planning

New Forecast

Forecast By Average

Show Sales Mix

Show Intervals

Events

Save

4. From the Forecasting page, you can select/enter new Periods, Week, and Fiscal year to review or create a forecast.
5. You can then make any needed adjustments to your Sales and Guests for the week.
6. Select **Save** to save any changes. Your Forecast is now updated.

NOTE: To create a new Forecast for a selected time period, select New Forecast.

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Forecast by Average

The manager also has the option to increase or decrease the forecast by % of sales. Note: this does not update any needed changes to forecasted guest counts.

1. On the Forecasting page, select Forecast by Average.
2. In the % column on the right side of the screen, increase (ex. 10%) or decrease (ex. -5%) the selected day.
3. Select Save to save your changes, the forecast will now be updated.

Forecasting

Forecast Options

Start Date: End Date: Period: Week: Fiscal Year:

Select Data Source:

Number of weeks back to use for calculations:
 Sales/Guests: Sales Mix:

Daily Forecast Amounts

Sales Date	Day	Sales	LY Same Day Sales	Guests	Forecasted
02/25/2016	Thursday	\$4,169	\$4,240	394	02/11/2016
02/26/2016	Friday	\$5,000	\$5,448	450	02/20/2016
02/27/2016	Saturday	\$5,826	\$8,278	528	02/11/2016
02/28/2016	Sunday	\$5,900	\$5,652	512	02/20/2016
02/29/2016	Monday	\$3,500	\$4,052	301	02/20/2016
03/01/2016	Tuesday	\$3,600	\$5,609	301	02/20/2016
03/02/2016	Wednesday	\$3,975	\$4,399	315	02/20/2016
		\$31,970	\$37,678	2,801	

Forecasting

Forecasting - Calculate Average

	Week of 1/14/2016	Week of 1/21/2016	Week of 1/28/2016	Week of 2/4/2016	Week of 2/11/2016	Week of 2/18/2016	Average	(%) Increase	Sales Forecast Week of 2/25/2016
Thursday	3,596	3,435	3,906	3,832	3,938	4,410	3,818	0%	3,818
include/weight	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 1			
Friday	4,148	4,443	4,286	5,040	5,106	4,261	4,508	0%	4,508
include/weight	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 1			
Saturday	5,885	5,750	6,130	5,810	5,223	6,158	5,894	0%	5,894
include/weight	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1						
Sunday	4,855	5,284	5,517	4,976	7,405	6,735	5,628	0%	5,628
include/weight	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 1			
Monday	3,567	3,012	2,735	2,993	3,575	3,770	3,287	0%	3,287
include/weight	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 1			
Tuesday	3,158	2,764	837	3,290	4,053	3,648	3,215	0%	3,215
include/weight	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 1			
Wednesday	3,447	3,710	3,548	4,077	3,461	4,007	3,682	0%	3,682
include/weight	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1			
TOTAL	16206	24963	23389	25942	10974	18652	30031		30032

Can increase/decrease forecast by % of Sales.
 Can see exactly what 6 weeks are used in the forecast.

Forecast Events

Managers can also use the **Events** diary on the Forecast page to forecast and record significant forecast/sales events such as Catering, CFRs, etc.

Forecasting

Forecast Options

Start Date	End Date	Period	Week	Fiscal Year
<input type="text" value="5/26/2016"/>	<input type="text" value="6/1/2016"/>	<input type="text" value="2"/>	<input type="text" value="1"/>	<input type="text" value="2017"/>

Select Data Source:

Number of weeks back to use for calculations:

Sales/Guests: Sales Mix:

Daily Forecast Amounts

Sales Date	Day	Sales	LY Same Day Sales	Guests	Forecasted
▶ 05/26/2016	Thursday	\$4,142	\$0	387	05/12/2016
05/27/2016	Friday	\$4,715	\$0	412	05/12/2016
05/28/2016	Saturday	\$5,663	\$0	497	05/12/2016
05/29/2016	Sunday	\$6,065	\$0	532	05/12/2016
05/30/2016	Monday	\$3,609	\$0	327	05/12/2016
05/31/2016	Tuesday	\$3,758	\$0	325	05/12/2016
06/01/2016	Wednesday	\$3,919	\$0	328	05/12/2016
		\$31,871	\$0	2,808	

Select **New** to add a new event

Events Selection Show Excluded

Search: for

Events between and

Event Name	Event ID	Start Date	End Date	Inherited From:
------------	----------	------------	----------	-----------------

Event Maintenance Exclude

Name:
ID:

Event Type
 Single Day
 Date Range

Event Date(s)
Start Date:

Forecast is based on:
 Default Forecast Method
 Previous Sales Date(s) Start Date:
 Empty Forecast

Comment:

Modify Menu Mix Forecast Exclude
Menu Items affected
All Specific
Increase/Decrease Menu Items by %
Add quantity by sales interval for affected Menu Items:

Enter the following information for the New Event:

Name: Enter Name of Event

ID: not needed

Event Type: Select Single Day or Date Range

Event Date(s): Start Date of event

Forecast: Default Forecast Method or Previous Sales Date

Comments: Any pertinent comments about this event

If this event is targeted to specific menu items:

Menu items affected:

Select All or Specific menu items

% of Increase/Decrease Menu Items: Select the % of Increase/Decrease

Select **Save** to save your Event. Your Event will now show up on your Event page.

If you make a mistake, you can Delete the Event and re-enter, etc.

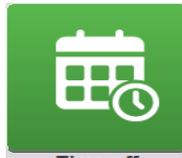
Scheduling

Entering Availability & Time-Off Requests

Schedule Availability is used to keep track of days off requests and employee availability.



1. From the Labor Switchboard, click the **Scheduling** **Scheduling** icon.



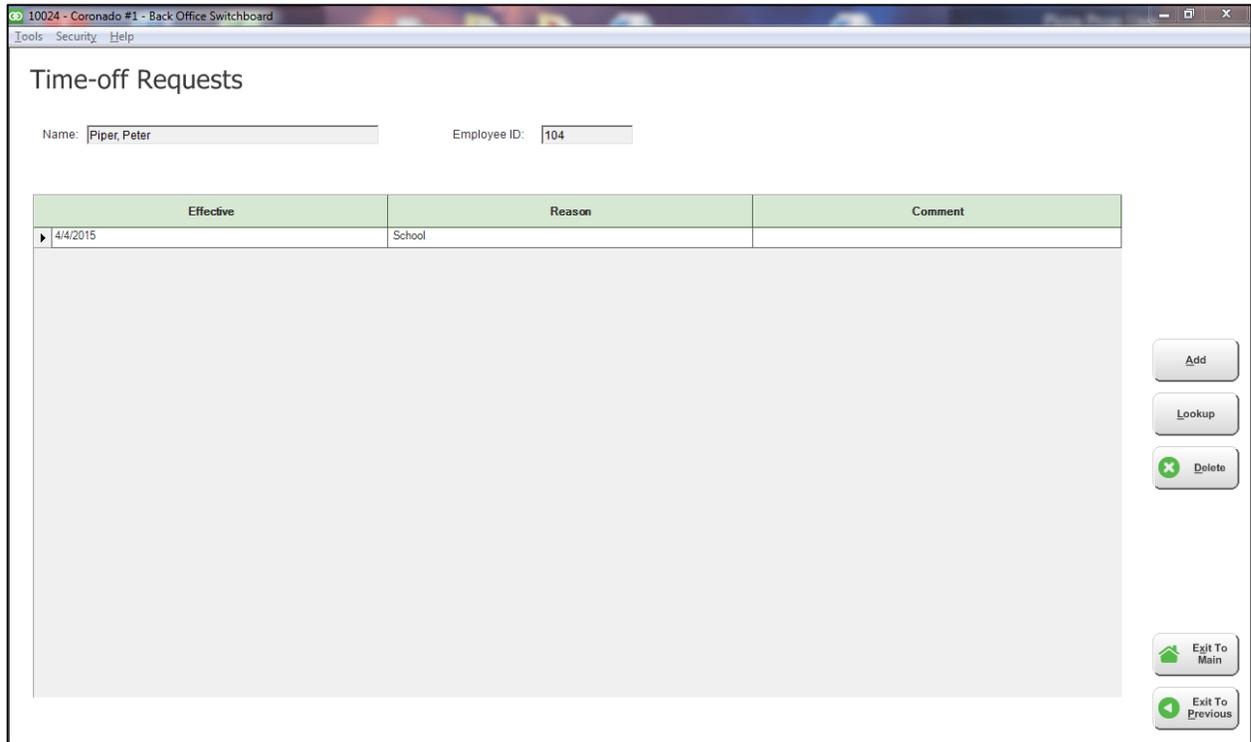
2. In the Scheduling screen, click **Time-Off Requests**. This screen will show all active employees at your location

Time-off Requests

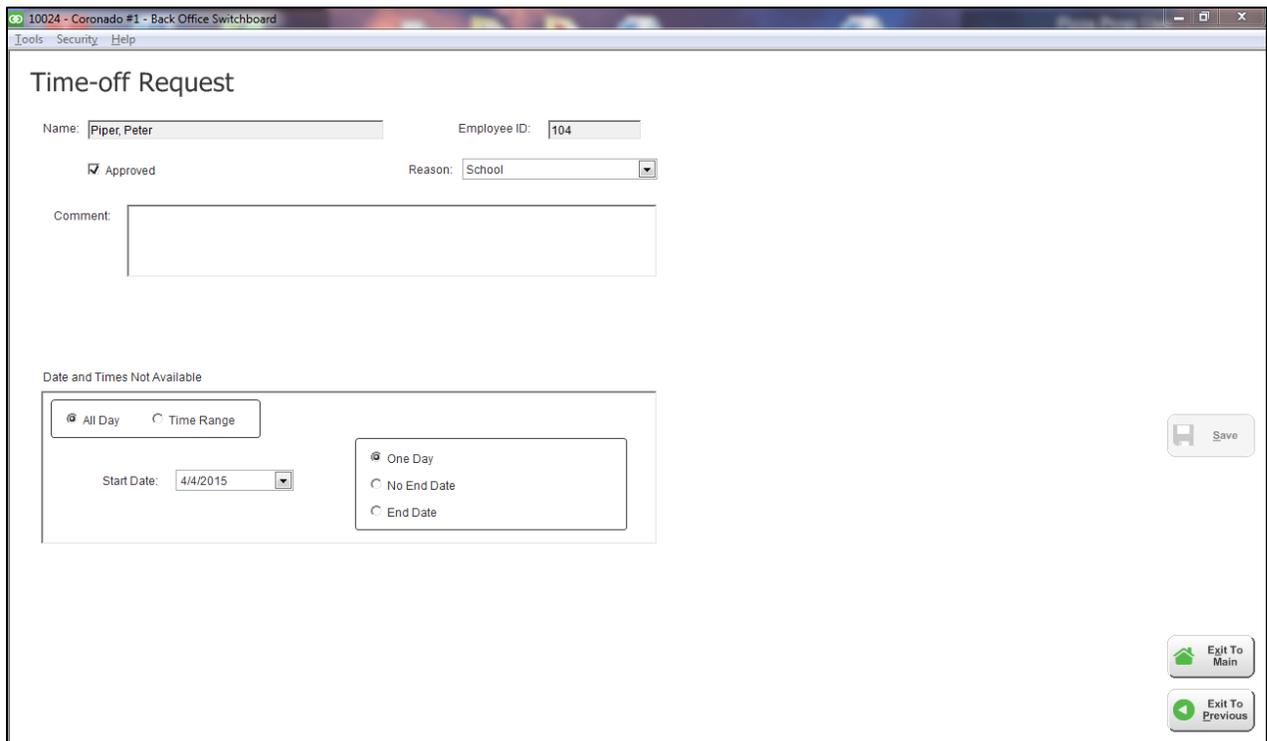
Search: for

Last Name	First Name	Employee ID
▶ Kelly	Lauren	5004
Kent	Clark	106
Murphy	Charlie	102
Murphy	Eddie	103
Piper	Peter	104
Rios	Geri	5006
Stark	Tony	107
Test	NCR	10000
Test2	NCR	5001
Trump	Donald	105

3. Select the employee you would like to adjust and click **Lookup**.



4. To add a schedule request, click **Add**. To adjust or delete an existing request, select the request and click **Lookup**. Both actions open the Availability Setting screen:



5. Select whether the Time Off request is **Requested** or **Approved**.
 - Requested time off appears in Yellow on the schedule and can be overwritten in the schedule.
 - Approved time off appears in Pink on the schedule and, depending on your system settings, may or may not be able to be overwritten in the schedule.
6. Select the **reason** for the time off. The available reasons for time off are configured by your system administrator.

7. Add **comments** to the comment section if desired.
8. In the **Dates and Times Not Available** section, select **All Day** if the request is for the whole day. If the request is for multiple days or only a certain time on a single day, select **Time Range**.

- Depending on the nature of the **availability request**, adjust the settings to enter the request into NBO.
- To keep your changes, click **Save**.

Date and Times Not Available

All Day Time Range

Start Time: 7:00 AM End Time: 7:00 AM

Start Date: 4/4/2015

One Day
 No End Date
 End Date

Recurrence

Every Day Sunday Monday Tuesday Wednesday
 Selected Days Thursday Friday Saturday

Creating a Schedule

With the Create Schedule function, you can create a new schedule from scratch or use an existing schedule as a starting point.

NOTE: Prior to creating a schedule, you should perform a Sales Forecast to review the labor percentage as it relates to scheduling. See [Forecasting Sales](#).

1. From the Switchboard, click the **Scheduling** icon.
2. In the Scheduling screen, click **Create Schedule**. This opens the Create Schedule dialog.
3. In the **Create Schedule** dialog, select the date for the schedule you want to create.

NOTE: The date shown is the starting date of the week.

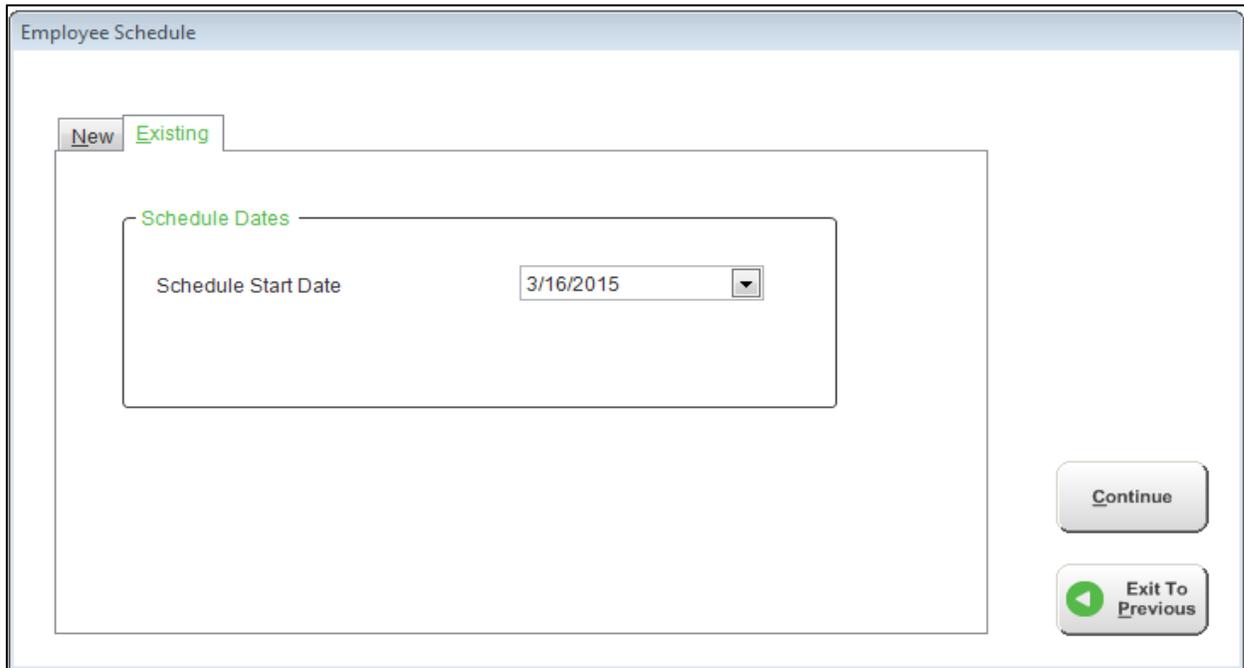
The screenshot shows the 'Employee Schedule' dialog box. It features two tabs: 'New' and 'Existing'. Under the 'New' tab, there are two radio buttons: 'Copy Previous Schedule' (selected) and 'Use Blank Schedule'. Below this is a section titled 'Schedule Dates' containing two date pickers: 'Schedule Start Date' set to 3/30/2015 and 'Copy From Schedule Start Date' set to 3/16/2015. At the bottom left, there is a checked checkbox labeled 'Do not copy shifts if employee has approved time off for a day'. On the right side, there are two buttons: 'Continue' and 'Exit To Previous'.

4. Select one of the following options:
 - **Blank** to create a blank schedule
 - **Copy From** to start with a previous schedule
5. Select one of the following view formats:
 - The **Daily View** displays the schedule in a graphical format where you can edit the schedule by 'painting' bars. The schedule displays one day at a time and shows the sales forecast, recommended staffing, and the variance between actual scheduled and recommended staffing figures.
 - The **Weekly View** displays the schedule in a text entry format and shows all seven days of the week at once. This format does not show the sales forecast or recommended staffing.
6. Click **Continue**.
7. The Schedule window appears based on the view format selected.
8. See [Weekly Schedule View \(p. 24\)](#) for instructions on editing shifts in the Weekly Schedule View.
See [Daily Schedule View \(p.26\)](#) for instructions on editing shifts in the Daily Schedule View.
9. Click **Save** to keep the changes.

Editing a Schedule

Use Edit Schedule to view or modify an existing schedule that was previously created through the [Create Schedule](#) feature.

1. From the Labor Switchboard, click the **Scheduling** icon.
2. In the Scheduling screen, click **Edit Schedule**.



The screenshot shows a dialog box titled "Employee Schedule". At the top, there are two tabs: "New" and "Existing", with "Existing" selected. Below the tabs is a large rectangular area containing a "Schedule Dates" section. This section has a label "Schedule Start Date" and a dropdown menu showing "3/16/2015". To the right of this area are two buttons: "Continue" and "Exit To Previous". The "Exit To Previous" button has a green circular icon with a white left-pointing arrow.

3. In the Update Schedule dialog, select the schedule you want to update. Click the drop-down list button to view the list of available schedules, which are listed by date.
4. Select one of the following view formats:
 - The **Daily View** displays the schedule in a graphical format where you can edit the schedule by 'painting' bars. The schedule displays one day at a time and shows the sales forecast, recommended staffing, and the variance between actual scheduled and recommended staffing figures.
 - The **Weekly View** displays the schedule in a text entry format and shows all seven days of the week at once. This format does not show the sales forecast or recommended staffing.
5. Click **Continue**. The Schedule window appears based on the view format selected.
 - See [Weekly Schedule View \(p. 24\)](#) for instructions on editing shifts in the Weekly Schedule View.
 - See [Daily Schedule View \(p. 26\)](#) for instructions on editing shifts in the Daily Schedule View.
6. When you are done working with the schedule, click **Save**.

Weekly Schedule View

The Weekly Schedule View displays each day of the week on a separate page for ease of use. In contrast with the [Daily Schedule View](#), the weekly view shows shifts for the entire week, but does not show forecast sales dollars or recommended staffing.

1. From the Labor Switchboard, click the **Scheduling** icon.
2. In the Scheduling screen, click **Create Schedule**.
3. In the **Create Schedule** dialog, select the date for the schedule you want to create.
4. Select **Blank** to create a blank schedule.
5. Select **Weekly**.
6. Click **Continue** to display the **Weekly Scheduler** view:

Employee Schedule

This schedule has not been published

Forecast Sales and Staffing Detail - Week of 4/13/2015 - 4/19/2015

		Mon 4/13	Tue 4/14	Wed 4/15	Thu 4/16	Fri 4/17	Sat 4/18	Sun 4/19
Forecasted Sales Total	\$35,615.	\$2,280.00	\$2,124.00	\$2,421.00	\$2,458.00	\$7,099.00	\$9,866.00	\$9,367.00
Scheduled Hours	11.25	0.00	0.00	11.25	0.00	0.00	0.00	0.00
Scheduled OT Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Scheduled Dollars	\$253.88	\$0.00	\$0.00	\$253.88	\$0.00	\$0.00	\$0.00	\$0.00
% Forecasted Sales*	0.71%	0.00%	0.00%	10.49%	0.00%	0.00%	0.00%	0.00%

Name	Total	Mon 4/13	Tue 4/14	Wed 4/15	Thu 4/16	Fri 4/17	Sat 4/18	Sun 4/19
Kelly, Lauren	0	Off	Off	Off	Off	Off	Off	Off
Kent, Clark	0	Off	Off	Off	Off	Off	Off	Off
Murphy, Charlie	0	Off	Off	Off	Off	Off	Off	Off
Murphy, Eddie	0	Off	Off	Off	Off	Off	Off	Off
Piper, Peter	4.500	Off	Off	10:45a-3:15p Manager	Off	Off	Off	Off
Rios, Geri	0	Off	Off	Off	Off	Off	Off	Off
Stark, Tony	0	Off	Off	Off	Off	Off	Off	Off
Test, NCR	3.000	Off	Off	8:30a-11:30a Manager	Off	Off	Off	Off
Test2, NCR	3.750	Off	Off	9:45a-1:30p Manager	Off	Off	Off	Off
Trump, Donald	0	Off	Off	Off	Off	Off	Off	Off

Mon 4/13 | Tue 4/14 | Wed 4/15 | Thu 4/16 | Fri 4/17 | Sat 4/18 | Sun 4/19 | Weekly

Save | Exit To Previous

Employees – Filters Schedule to view by all or only scheduled employees

Jobs – Filters schedule view by job assigned job code.

Schedule Notes  - Press this button to add additional schedule notes

Schedule Legend  - The Schedule Legend offers detail about Shift colors

Binocular  - Filters Schedule by Employee

Schedule Report  - Provides a graph of forecasted sales and scheduled staff for the selected day

Forecasted Sales – Forecasted Sales for the day

Scheduled Hours – Scheduled labor hours

Scheduled OT Hours – Scheduled Overtime Hours

Scheduled Dollars - Scheduled labor dollars for the day

% Forecasted Sales - Scheduled labor % of forecast sales

Employee Name - Employee list, affected by sorting and filtering options. The columns to the right of the employee's name shows total, regular, and overtime hours. Use the scroll bar at the bottom of the Employee/Total section to view these columns.

Adding a Shift in Weekly View

1. From the Weekly Scheduler view, locate the **employee** and **day** for which you would like to add a shift.
2. In the employee's row, click the dropdown for the day you would like to add the shift.

Piper, Peter	4,500	Off	Off	10:45a-3:15p Manager	Off	Off	Off	Off
Rios, Geri	0	Off	Off	Off	Off	Off	Off	Off
Stark, Tony	0	Off	Off	Off	Off	Off	Off	Off

3. Type in the desired **shift**. (ex. '3:00pm-8:00pm').
 - **NOTE:** NBO may adjust the formatting of this text after you enter it. If NBO cannot determine the start and end times if your entry, try using the above format.
4. Press the **Enter** key to move to the next field.
5. To keep your changes, click **Save**.

Deleting a Shift in Weekly View

1. From the Weekly Scheduler view, locate the **employee** and **day** you would like to delete a shift for.
2. Select the shift by clicking the dropdown for the shift.

Piper, Peter	4,500	Off	Off	10:45a-3:15p Manager	Off	Off	Off	Off
Rios, Geri	0	Off	Off	Off	Off	Off	Off	Off
Stark, Tony	0	Off	Off	Off	Off	Off	Off	Off

3. Change the shift to **Off**.

Modifying a Shift in Weekly View

1. From the Weekly Scheduler view, locate the **employee** and **day** you would like to change a shift for.
2. Select the shift by clicking the dropdown for the shift.
3. Edit the **text** by using your keyboard.

Swapping a Shift in Weekly View and Assigning a Station

1. From the Weekly Scheduler view, locate the **employee** and **day** you would like to change a shift for.
2. Right click on the shift

Shift Detail Assignment

Employee Cabralles, Matthew

Assign to *Please Select*

Job *Team Member*

4:00 PM-10:00 PM

Un-Post Shift
 Post Shift

Time-off Requests

Station
<None>
Cash
DRA
GRA
Hostess
Make Table
Oven/Cut

Cancel Delete Shift Save

3. In the pop-up box swap a shift with another employee, assign a station or delete the shift entirely.

Copying a Shift in Weekly View

1. From the Weekly Scheduler view, select the shift you would like to copy by clicking the dropdown for the shift.
 2. Right click inside of the shift's text and select **Copy** from the menu.
 3. Select the shift you would like to copy to by clicking the dropdown for the shift.
 4. Right click inside of the shift's text and select **Paste** from the menu.
- NOTE:** You can also use the keyboard shortcuts **CTRL+C** to copy and **CTRL+V** to paste.

Daily Schedule View

The Daily Schedule View displays each day of the week on a separate page for ease of use. In contrast with the [Weekly Schedule View](#), the daily view shows forecasted sales, recommended staffing, and the variance between recommended and scheduled staffing levels per interval.

1. From the Labor Management screen, click the **Scheduling** icon.
2. In the Scheduling screen, click **Create Schedule**.
3. In the **Create Schedule** dialog, select the date for the schedule you want to create.
4. Select **Blank** to create a blank schedule.
5. Select **Daily**.
6. Click **Continue** to display the **Daily Scheduler** view:

Employee Schedule

This schedule has not been published

Forecast Sales and Staffing Detail - Wednesday, April 15, 2015

Forecasted Sales Total	\$2,421.00	285	0	43	352	368	371	20	416	247	0	174	0	63	82	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Scheduled Hours	11.25	0	0	0	0	0	0	0	0	1	1	1	1	1	2	2	2	2	2	3	3	3	2	2	2	2	2	2	2	2	2	2	2	1	1	1	1	1	1

Name	Total	6:30 AM	7:30 AM	8:30 AM	9:30 AM	10:30 AM	11:30 AM	12:30 PM	1:30 PM	2:30 PM
Kelly, Lauren	0									
Kent, Clark	0									
Murphy, Charlie	0									
Murphy, Eddie	0									
Piper, Peter	4.500									Manager - 4.50 Hours
Rios, Geri	0									
Stark, Tony	0									
Test, NCR	3.000									Manager - 3.00 Hours
Test2, NCR	3.750									Manager - 3.75 Hours
Trump, Donald	0									

Mon 4/13 | Tue 4/14 | **Wed 4/15** | Thu 4/16 | Fri 4/17 | Sat 4/18 | Sun 4/19 | Weekly

Schedule Metrics				
	Hours	OT Hours	Dollars*	% F Sales*
Daily:	11.25	0.00	\$253.88	10.49%
Weekly:	11.25	0.00	\$253.88	0.71%

Save | Exit To Previous

The **Forecasted Sales Total** row displays the forecasted sales by the time interval set up in your system (typically half or quarter hours). The forecast is created through the [Forecasting function](#).

The **Employee Name** section lists all employees as well as the total, regular, and overtime hours as currently scheduled. Use the scroll bar at the bottom of the employee name section to view.

NOTE: Your viewing options may affect which employees are displayed on this list, including total scheduled hours, scheduled overtime hours, scheduled labor dollars, and scheduled labor dollars as a percent of forecasted sales.

Forecast Sales and Staffing Detail - Wednesday, April 15, 2015									
Forecasted Sales Total		\$2,421.00							
Scheduled Hours		11.25							
Name	Total	Regular	OT	ID	Group	Ranking	Time	Jobcode	Status Type
Kelly, Lauren	0	0	0	5004					Full-Time
Kent, Clark	0	0	0	106					Part-Time
Murphy, Charlie	0	0	0	102					Part-Time
Murphy, Eddie	0	0	0	103					Part-Time
Piper, Peter	4.500	4.500	0	104			10:45 AM	Manager	Part-Time
Rios, Geri	0	0	0	5006					Full-Time
Stark, Tony	0	0	0	107					Part-Time
Test, NCR	3.000	3.000	0	10000		Meets Expectatio	8:30 AM	Manager	Part-Time
Test2, NCR	3.750	3.750	0	5001		Exceeds Expectat	9:45 AM	Manager	Part-Time
Trump, Donald	0	0	0	105					Part-Time

The **Daily and Weekly Labor Metrics** displays information about the current schedule, including total scheduled hours, scheduled overtime hours, scheduled labor dollars, and scheduled labor dollars as a percent of forecasted sales.

The Bar Graphs represent the scheduled shift for each employee. The color of the graph indicates information about the shift or employee as follows:

Blue	Regular scheduled shift
Green	Employee and shift currently being modified.
Orange	Indicates the employee scheduled will be approaching overtime
Red	Indicates the employee is scheduled into overtime
Purple	Indicates a minor law violation (defined by system administrator)
Gray	Indicates the employee is already scheduled for a shift for another job type.
Yellow	Indicates the employee has a requested Not Availability
Pink	Indicates the employee has an approved Not Available setting.

When you are finished viewing or working with the Daily Scheduler view, click **Exit to Main** or **Exit to Previous**.

Deleting a Shift in Daily View

1. From the Daily Scheduler view, select the shift you want to delete by clicking inside the colored bar.
2. The shift turns green to indicate that it is the currently selected shift.
3. Press the **delete** button on your keyboard.

Modifying a Shift in Daily View

1. From the Daily Scheduler view, click either end of the shift you wish to change.
2. Hold the left mouse button down and drag the bar to the desired start or end time.

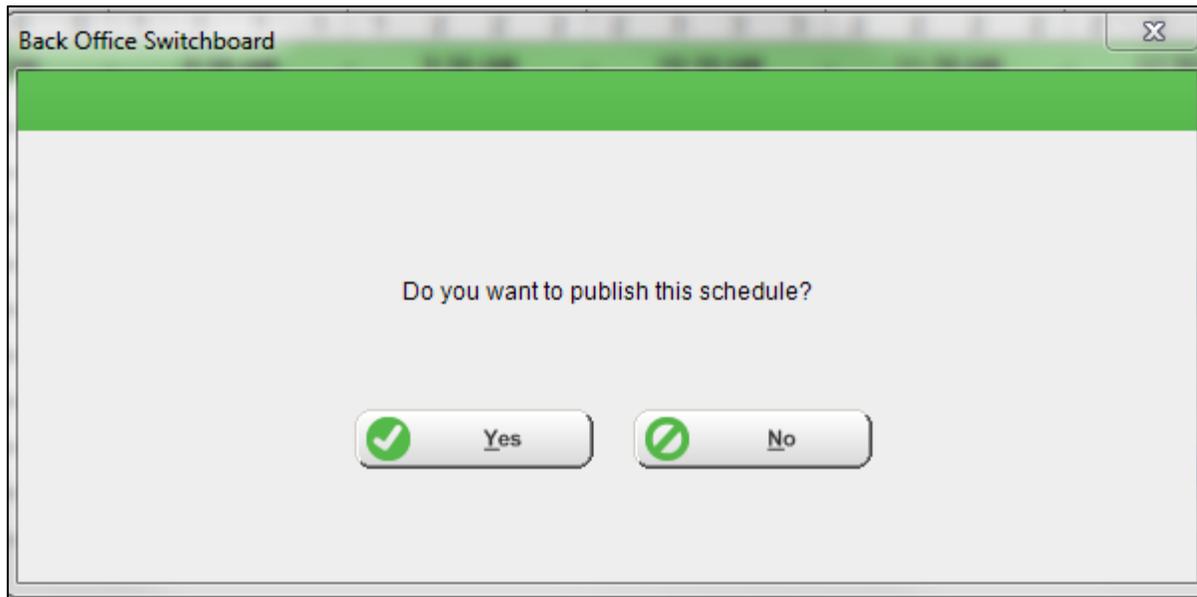
Swapping a Shift in Weekly View and Assigning a Station

1. From the Daily Scheduler view, locate the **employee** you would like to change a shift for.
2. Right click on the shift and proceed to swap a shift, assign a station or delete the shift entirely.

Publishing a Schedule

After you have completed the Schedule, Save it and **press exit to previous**. Before being able to move forward to the next screen the system will prompt you to choose whether or not you want to **publish** the schedule.

Upon publishing, employees will receive either an email and/or text message with their schedule information, depending on their set-up in Schedule Options on the POS terminal. It is recommended that the schedule should only be published when the entire schedule has been completed and approved.



Mobile Schedules

Mobile Schedules allows employees and manager to receive schedules via text message and/or email electronically based on how they enrolled.

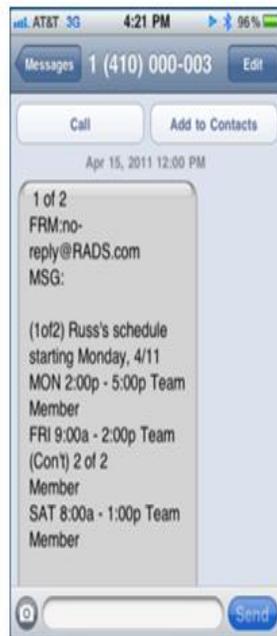
1. Employees enroll directly thru the POS system
2. Log into POS
3. Select Special Functions
4. Selects NCR Back Office Mobile Schedules

Employees can choose to receive their schedules via text message and/or email.

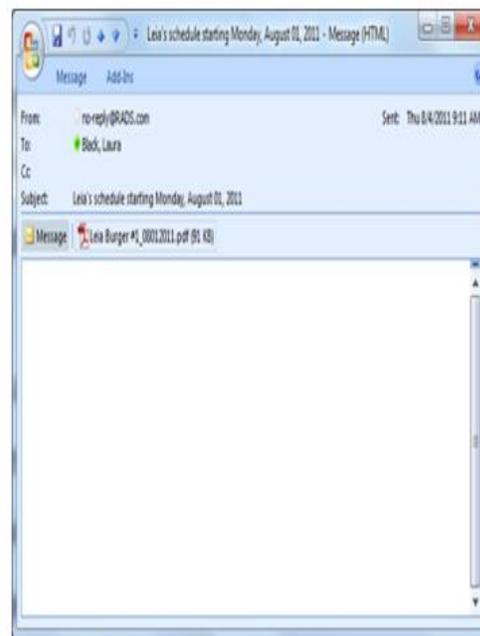
Employee Signs Up on the POS system



Text Message



Email



Once employee self-enrolls, make sure to select My Schedules in the employee's Employee Profile to activate Mobile Schedules for the employee.

1. Select Labor
2. Select Employees
3. Select Employee Maintenance
4. Select Employee's Name

Employee - Profile

* Indicates Required Fields

Employee Emergency Status Jobcode Point of Sale Custom Fields

General Information

*Employee ID: 100340072 *Hire: 9/1/2008

*First: Melissa Middle: *Last: Bennett

*Birth: 8/12/1949

Contact Information

Address: 6397 Upperridge Drive

Phone: 7409759628

Alternate Phone: 7409759628

Email Address:

Other Information

NCR Pulse Apps

My Schedule

Save

Print

Select My Schedule

Select Save to save changes

NCR Pulse Apps

My Schedule

Managers can also send a message to employees that have enrolled in Mobile Schedules.

This messaging capability is helpful for trying to quickly reach employees to cover an available shift, or important team/store information the team may need to know.

You can access the messaging functionality directly in the Employee Schedule or in Employee Central by selecting the employee's name.

Employees are not required to enroll in Mobile Schedules, but the manager should inform the employees about this option.

Team members highlighted in **blue** on your schedule indicate they have signed up for Mobile Schedules. The manager can also send an alert message or notification to them.

<u>Forecasted Sales Total</u>	\$5,320.00	
Daily Recommended	186.00	
Staffing +/-	-27.00	
Rec Peak Shift Coverage		
Name	Total	Regular
Arenas-Estrada, Karen	34.000	34.000
Baltierra, Christina	0	0
Barner, Tyler	20.000	20.000
Behn, Emman	0	0
Bennett, Melissa	27.000	27.000
Bogue, Zane	0	0
Buckerfield, Patricia	36.000	36.000
Bulger, Brittany	18.250	18.250
Burks, Rusti	29.500	29.500
Cashier, Cashier	0	0
Ceesay, Sulayman	35.000	35.000
Clayton, Thomas	0	0

Send Schedules & Messages

Recipient

Employee Jobcode All Employees

Barner, Tyler

Send Schedule  

Send Message

We have a serving shift tonight,
would you like to work?

New Menu Meeting on Thursday at
2pm!

0 of 150 Characters Allowed



Manager's Schedule

Standard Operating Procedure:

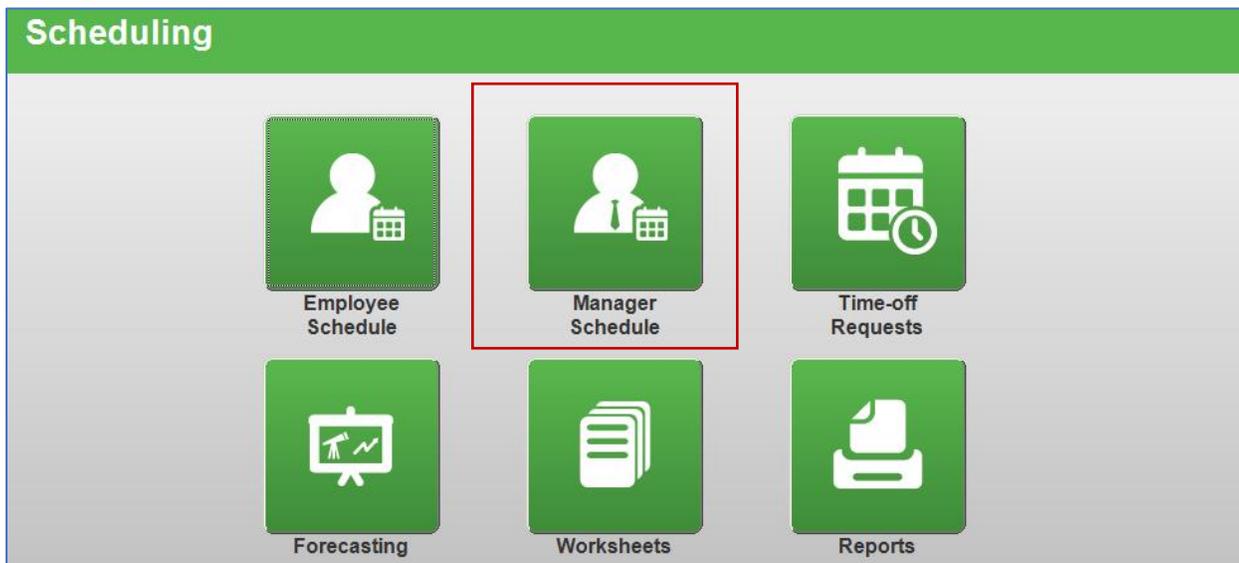
The GM will need to enter the Manager's Schedule into NBO by the 3rd week of each month for the following month. Up to 6 weeks of manager's schedules can be entered into NBO.

- The GM will notify their Director of Operations when the Manager's Schedule has been entered into NBO.
- The Director of Operations will review the Manager's Schedule of all of their restaurants each month to ensure there is appropriate management coverage at the restaurant to meet the needs of the expected business.
- Director of Operations can review all of their restaurants Manager's Schedules in NBO directly in the Manager Schedule page by simply selecting the site they want to review.

To Enter a Manager's schedule into NBO:

All Managers and Shift Leaders are assigned to the Manager Schedule Group in Employee Maintenance.

- Log into NBO>Labor>Employees>Employee Maintenance>Select Manager>Select Status tab>Schedule Group: Select Manager>Save to Update.
- Enter any upcoming Time-Off Requests for the manager in Time-Off Requests.
- In NBO>Select Labor>Select Scheduling>Select Manager Schedule



Manager's Schedule

Similar to the Employee Schedule, you have the option to:

- Existing-Select an Existing Schedule to view or edit an existing schedule.
- New-Copy a Previous schedule.
- New-Use Blank Schedule to create a new one.
- Number of Weeks: You can select up to 6 weeks for the schedule.
- Once you select your options for the manager's schedule, select **Continue**.

Manager Schedule

New Existing

Copy Previous Schedule
 Use Blank Schedule

Schedule Dates

Schedule Start Date: 5/19/2016

Number of Weeks: 6

Copy From Schedule Start Date: 3/24/2016

Do not copy shifts if employee has approved time off for a day

Continue

Exit To Previous

Manager Schedule

Display Options

Start Date: 6/2/2016 Employees: All

Weeks: 4 Jobcodes: All

Site: Unit 5 Group by Schedule Group

Managers	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	
Approved	Total	6/02	6/03	6/04	6/05	6/06	6/07	6/08
Hill, Christopher	49,000	Off	Off	12:30p-10:30p	1:00p-10:00p	12:00p-10:00p	12:00p-10:00p	12:00p-10:00p
Koehler, Crystal	40,000	Off	12:30p-10:30p	5:30a-3:30p	Off	5:30a-3:30p	5:30a-3:30p	Off
Stanley, Tisha	40,000	8:30a-6:30p	5:30a-3:30p	9:00a-7:00p	6:30a-4:30p	Off	Off	Off
Approved	Total	6/09	6/10	6/11	6/12	6/13	6/14	6/15
Hill, Christopher	49,000	Off	Off	12:30p-10:30p	1:00p-10:00p	12:00p-10:00p	12:00p-10:00p	12:00p-10:00p
Koehler, Crystal	50,000	Off	12:30p-10:30p	9:00a-7:00p	6:30a-4:30p	5:30a-3:30p	5:30a-3:30p	Off
Stanley, Tisha	20,000	Off	Off	5:30a-3:30p	Off	Off	Off	9:00a-7:00p
Approved	Total	6/16	6/17	6/18	6/19	6/20	6/21	6/22
Hill, Christopher	49,000	Off	Off	12:30p-10:30p	1:00p-10:00p	12:00p-10:00p	12:00p-10:00p	12:00p-10:00p
Koehler, Crystal	50,000	Off	12:30p-10:30p	5:30a-3:30p	6:30a-4:30p	5:30a-3:30p	5:30a-3:30p	Off
Stanley, Tisha	50,000	12:30p-10:30p	9:00a-7:00p	9:00a-7:00p	9:00a-7:00p	Off	Off	9:00a-7:00p
Approved	Total	6/23	6/24	6/25	6/26	6/27	6/28	6/29
Hill, Christopher	49,000	Off	Off	12:30p-10:30p	1:00p-10:00p	12:00p-10:00p	12:00p-10:00p	12:00p-10:00p
Koehler, Crystal	50,000	Off	12:30p-10:30p	9:00a-7:00p	6:30a-4:30p	5:30a-3:30p	5:30a-3:30p	Off
Stanley, Tisha	50,000	12:30p-10:30p	9:00a-7:00p	5:30a-3:30p	9:00a-7:00p	Off	Off	9:00a-7:00p

Payroll Close

Validation of your restaurant's labor and payroll each day and at the end of the week is a critical task to running a great restaurant and controlling your labor.

Key steps have been built into your Daily & End of Week workflows to assist you with performing the key tasks to validating your daily labor and end of week payroll close.

Every Wednesday- Perform your Payroll Pre Close Steps:

1. Go to Workflow>Select Current Day Import to import current day information.
2. GM reviews the (1.15) Time Clock Detail report for the current week.
 - Verify Manager Hours are accurate for the week.
 - Verify hours for all employees that worked are accurate for the week.
 - Any non-worked time (PTO, etc.) has been correctly entered in Weekly Non Worked Hours.
 - Review the (1.46) Payroll with Non Worked Hours Report to verify Weekly Non Worked Hours.
 - **IMPORTANT: Look for any employees/managers clocked out at 2AM, meaning they did not clock out and were auto clocked out by the system.**
3. Check the Shift tab from the prior day to ensure all employees clocked out from the day before.
4. GM reviews the (1.20) Employee Punch Errors Report for the week for any rejected punches for the week. If needed, contact the help desk to resolve the issue.
5. Review the (1.45) Hours and Tips Report for excessive tip issues (ex. Employee entered cash tip incorrectly on POS for \$10,000). If needed, correct the declared tip amount in NBO.
6. Review the (1.50) Weekly Tip Credit by Employee Report for any employees in a tip shortfall that resulted in minimum wage make up pay; coach employee's on tip reporting as needed.

IMPORTANT: Thursday mornings before 11am the Opening Manager will need to confirm Step 3 again to check for any employees that may not have clocked out on Wednesday night, and as a result the NCR system clocked them out at 2AM on Thursday.

NOTE: The system will automatically close out the restaurant's payroll on Thursday mornings at 11am EST.

Labor Reports

To access NBO Labor Reporting, select Labor> Select Reports

There are many reports on the POS & NBO to assist you with labor performance, payroll, and employee information.

In becoming an expert on the NCR system, begin to familiarize yourself with POS & NBO reporting.

Some of the more critical NBO labor reports are:

Payroll/Time Keeping

- 1.15 Time Clock Detail
- 1.20 Employee Punch Errors
- 1.25 Employees Clocked Out by NCR Aloha End of Day
- 1.45 Hours and Tips
- 1.50 Weekly Tip Credit by Employee
- 1.46 Payroll with Non- Worked Hours
- 1.55 Employee Shift Edit by Business Date

Labor Performance

- 2.05 Proactive Labor Report
- 2.06 Reactive Labor Report
- 2.07 Labor Analysis
- 2.10 Approaching Overtime
- 3.06 Sales Comparison

Scheduling

- 2.40 Employee Schedule Chart by Job
- 3.30 Weekly Schedule by Schedule Group
- 3.40 Manager Schedule
- 3.45 Time Off Request-Sortable

Employee Information

- 4.35 Employee Central by Status Type

Transferring Inventory from One Restaurant to Another

There are two functions to every transfer. First, the sending store (the lender) creates a Transfer Out. Second, the receiving store (the borrower) accepts the pending transfer. Both of these functions should be performed on the actual day of the product transfer from one store to the other, however it must be transferred and accepted before end of week.

NOTE: The product doesn't "leave" the transfer initiating site until the receiving store accepts the transfer in NBO.

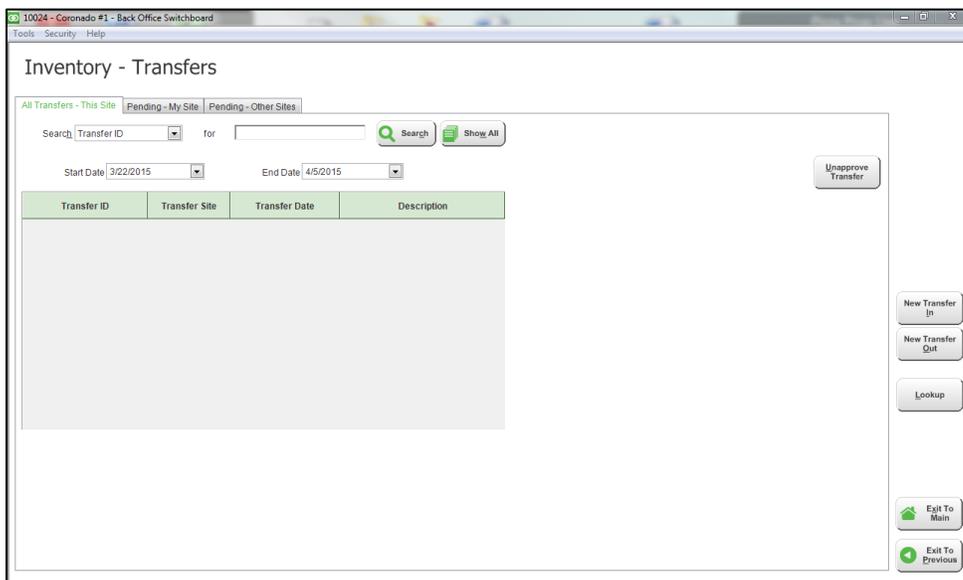
Creating a Transfer Out

From the Desktop, log in to NBO.

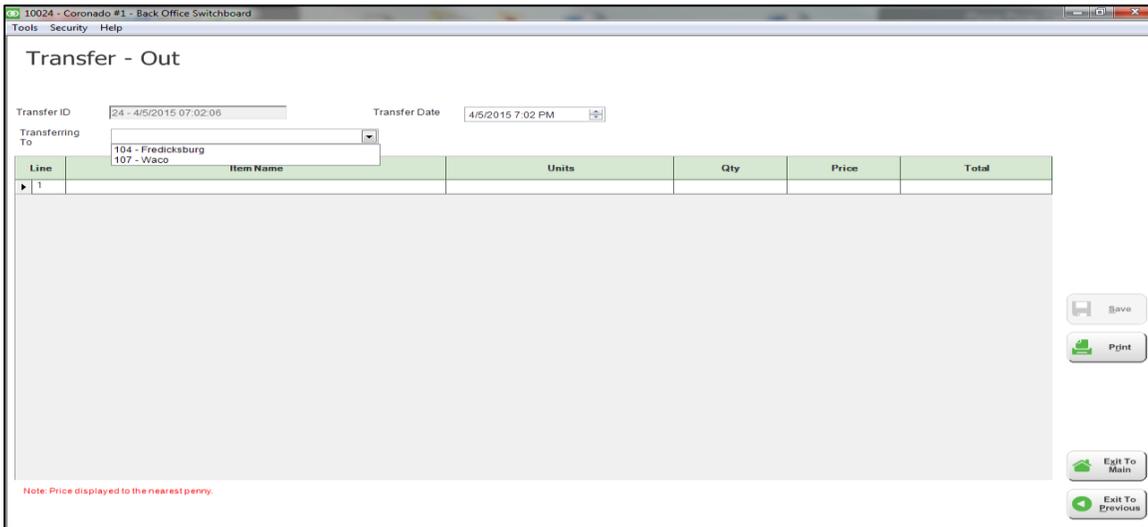
Click Inventory and Prep.



1. Click **Transfers** Transfers. The Inventory – Transfers screen appears.



2. Click **New Transfer Out**. The Transfer – Out screen appears



Transfer ID: 24 - 4/5/2015 07:02:06 Transfer Date: 4/5/2015 7:02 PM

Transferring To: 104 - Fredicksburg
107 - Waco

Line	Item Name	Units	Qty	Price	Total
1					

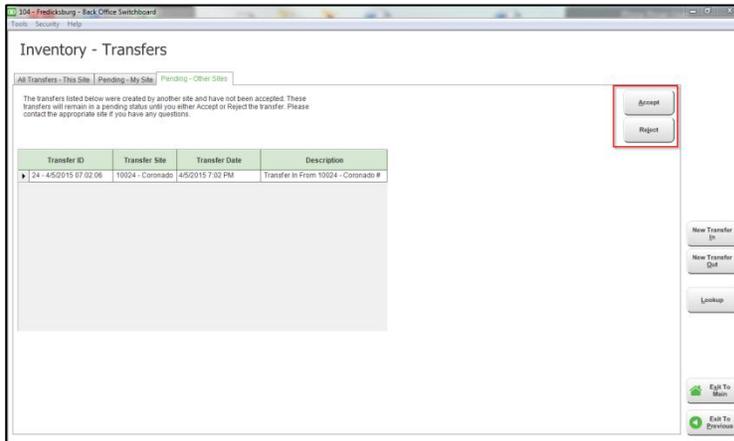
Note: Price displayed to the nearest penny.

3. Use the drop-down arrow to choose the receiving site.
4. Add the products to be transferred by typing the name of the product in the **Item Name** field.
5. Tab to the **Units** field, and choose the correct unit.
6. Type the quantity in the quantity field.
7. The price and total fields will auto-populate.
8. Click **Save**.

Receiving a Pending Transfer

1. From the Desktop, log in to NBO.
2. Click Inventory and Prep.
3. Click Transfers. The Inventory – Transfers screen appears.

Note: All transfers need to be completed before end of week inventory counts per Bob Evans policies.

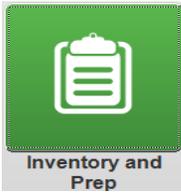


4. Click **Pending- Other Sites** tab.
5. Click the pending transfer so that it is highlighted.
 - At this point you will be able to preview the pending transfer.
 - Once verified product amounts are correct, you can accept transfer.
6. Click Accept.

Inputting and Tracking of Waste

NBO allows you to track spoil and loss by entering items and giving a reason for the waste.

1. From the Desktop, log in to NBO.

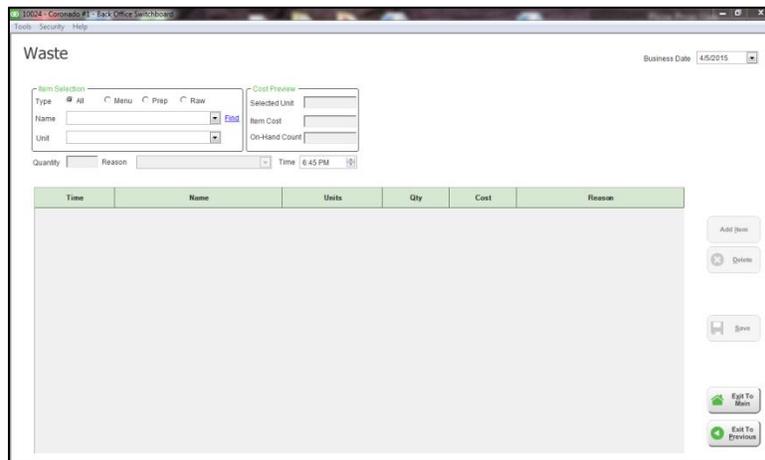


2. Click **Inventory and Prep**.



3. Click **Waste**. The Inventory Waste screen appears.

4. Select an item type by clicking a radio button next to Menu, Prep or Raw.
 - You can also select All to view a list of all items if you are not sure of the category.
 - The Waste flag on the Inventory tab of Item Lookup determines if an item will appear in these lists.



5. Choose an item to waste by doing one of the following:
6. Select an item from the Item Name drop-down list.
 - Items in the drop-down list match the category selected in step 4.
7. Click the Find button to display the Inventory Waste Select window.
 - The items displayed in the window match the category selected in step 4.
8. Highlight a line item and click **Select**.

Item Selection

Search: Item Name for Search Show All

Item Name	Item ID	Raw	Menu	Prep
▶ JUICE ORANGE NFC	90013138*	☑	☐	☐
BAKING POWDER	90012006	☑	☐	☐
BANANAS	90010013	☑	☐	☐
BASE CHICKEN 5 LB	90012124	☑	☐	☐
BASE FRENCH TOAST	90012138	☑	☐	☐
BASE NO MEAT POT PIE	90012086	☑	☐	☐
BEANS GREEN	90009006	☑	☐	☐
BEANS NAVY	90009021	☑	☐	☐
BEEF COUNTRY FRIED STEA	90005026	☑	☐	☐
BEEF GRND PTY ANGUS 3.2	90005033	☑	☐	☐
BEEF GRND PTY ANGUS 7 O	90005082	☑	☐	☐
BEEF ROAST	90005007	☑	☐	☐
BEEF STEAK SIRLOIN 6 OZ	90005003	☑	☐	☐
BEVERAGE COFFEE 2L	90012117	☑	☐	☐

Select

9. To account for spoiled/expired food, find the item Spoiled/Expired Product item and log by the appropriate unit.

Waste & Inventory Adjustments

Business Date 12/15/2015

Waste Corporate Adjustment

Item Selection

Type All Menu Prep Raw

Name BEEF ROAST [Find](#)

Unit CS=6/4LB

Cost Preview

Selected Unit CS=6/4LB

Item Cost 96.630

On-Hand Count 2.916

Quantity Reason Time 2:50 PM

DROPPED

IMPROPER ROTATION

OVER PRODUCED

SPOILED/EXPIRED

Time	Name

Add Item
 Delete
Save

The item populates the Inventory – Waste screen.

10. Verify the date and time the item was lost. By default, NBO displays the current date in the Business Date field and the current time in the Time Item was lost field. You can change these to a date and time prior to the current date and time.
11. In the Enter Quantity field, enter the amount of the item that was wasted based on the corresponding per Unit ID (the unit of measure) that can be selected to the right.
12. In the Reason field, enter a brief reason as to why the waste occurred.
Note: This field, if defined by your administrator, may have a drop-down list of possible waste reasons from which to choose.
13. After all information has been entered, click Add Item to add the item to this Waste list.

NBO calculates and fills in the Cost Information for the waste.

Waste & Inventory Adjustments

Business Date 12/15/2015

Waste Corporate Adjustment

Item Selection

Type All Menu Prep Raw

Name [Find](#)

Unit

Cost Preview

Selected Unit

Item Cost

On-Hand Count

Quantity Reason Time 2:44 PM

Time	Name	Units	Qty	Cost	Reason
▶ 2:44 PM	Salmon	EA	1.000	\$3.65	DROPPED

Add Item

Delete

Save

14. Repeat steps 6 through 9 until all wasted items have been entered.
15. When the list is finished, click **Save**.

Waste Management Tips

When a Prep Item or Menu Item is selected, all of the ingredients listed in their recipes are also wasted and will show in any of the Spoil and Loss reports.

NBO does not save waste information in the database until you click Save. If you haven't clicked Save yet, you can change the quantity wasted or reason by making the correction in the Qty or Reason fields in the Spoilage and Loss grid.

If you entered the wrong amount for an item and have clicked Save, you can modify the quantity and/or reason by going to that item's entry in the spoil and loss detail area and making changes. You cannot make changes to the item name or the units.

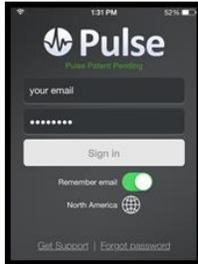
If you need to remove an item from the spoil and loss screen, click the box to the left of the time entry to select the line and press the delete key on your keyboard.

Counting Inventory on the iPad

Inventory counts are done on the iPad and posted from it. It is not finally posted until EOD ends at 2am.

Some of the great features of doing your counts on the iPad are counting each item multiple ways (no conversions) and it eliminates double entry – it does not need to be entered into the back office computer unless the iPad is not functioning correctly.

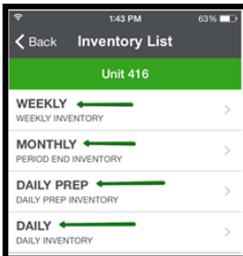
1. Log into Pulse App with your credentials.



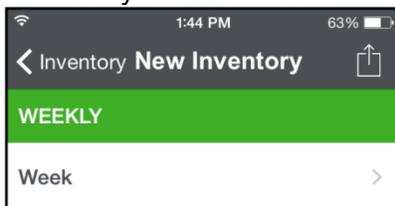
2. Select Inventory.



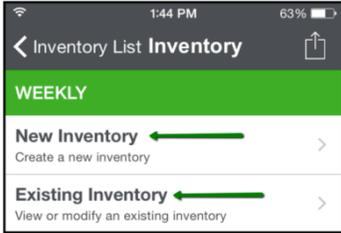
3. Select the type of Inventory you would like to perform. Daily, Weekly, Monthly or Daily Prep.



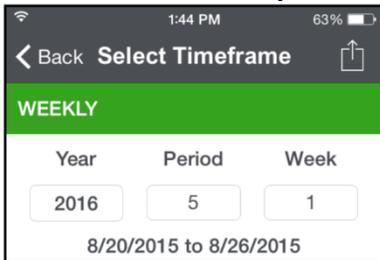
If "Weekly" select "Week"



4. Select if it is a New or Existing Inventory Count



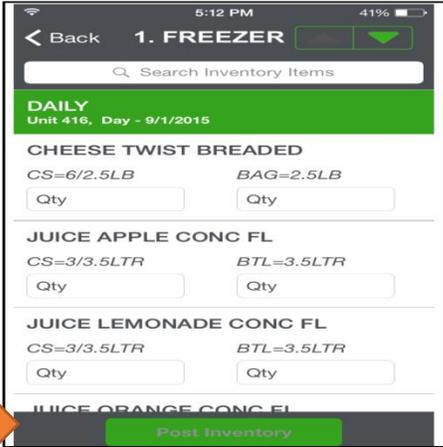
And Select the Week you would like to count



Create Inventory

To begin your counts

- Think about what you're doing when entering counts, don't just go through the motions.
- You must be completely connected to Wi-Fi when you select your inventory list. This gives the device an opportunity to connect with NCR Back Office (NBO) and tell it what is on the list you are about to count.
- It is absolutely necessary to be connected to Wi-Fi when starting a new inventory. You must pull up the location count sheet before proceeding to the WIFI free area. You will not be able to pull up a count sheet in a Wi-Fi free zone.
- You can now enter an area that has no Wi-Fi signal and begin your count.
- Make sure that you return to an area that has Wi-Fi when you "Post" your inventory. The Pulse app will not let you post the inventory unless you are connected to the Wi-Fi+.
- Once you select "post" on the iPad it saves your counts and the final posting will automatically occur at EOD 2 AM.
- Be sure to select "post" after each area to save your counts in that area.
- **Please see user manual for details on how to conduct inventory if Wi-Fi is down.**



The screenshot shows the Pulse app interface for entering inventory counts. At the top, it displays the time (5:12 PM) and battery level (41%). The screen is titled "1. FREEZER" and has a "Back" button. Below the title is a search bar labeled "Search Inventory Items". The main content area lists items with their respective units and quantity input fields:

- DAILY**
Unit 416, Day - 9/1/2015
- CHEESE TWIST BREADED**
CS=6/2.5LB BAG=2.5LB
Qty Qty
- JUICE APPLE CONC FL**
CS=3/3.5LTR BTL=3.5LTR
Qty Qty
- JUICE LEMONADE CONC FL**
CS=3/3.5LTR BTL=3.5LTR
Qty Qty
- JUICE ORANGE CONC FL**
Qty Qty

At the bottom of the screen, there is a green button labeled "Post Inventory". An orange arrow points to this button from the left side of the image.

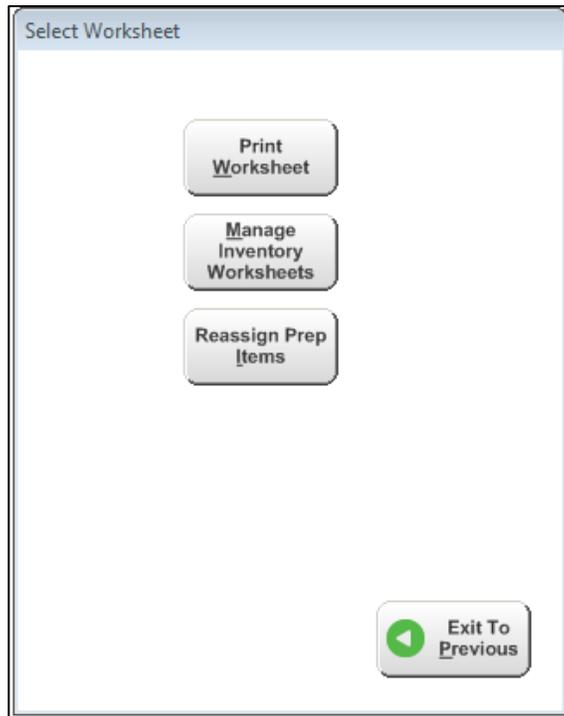
Adding Daily or Weekly Inventory Counts Manually (only if iPad is not working)

Printing Worksheets

1. From the Desktop, log in to NBO.
2. Click **Inventory and Prep**.



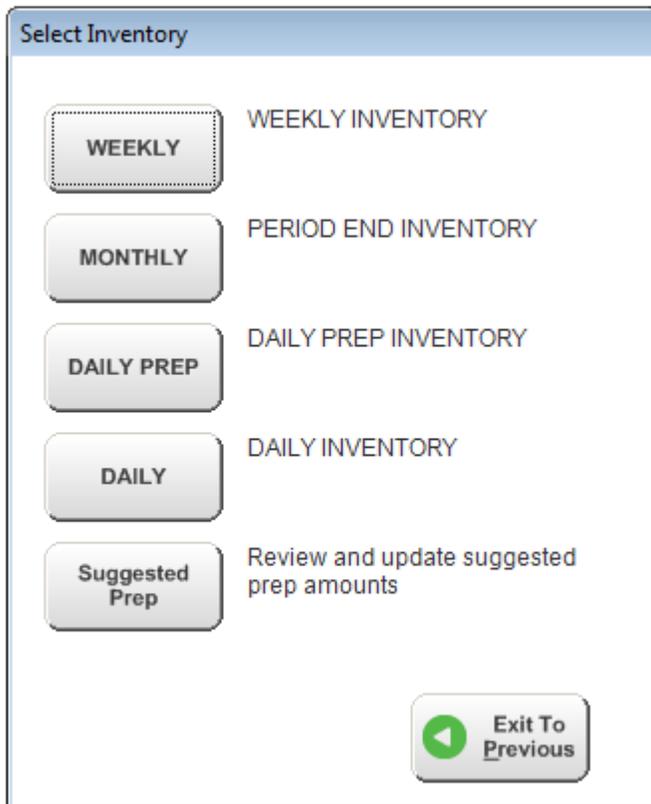
3. Click **Worksheet**. The Inventory Worksheet Selection dialog appears.



4. Click **Print Worksheet**.

Selecting Type of Inventory

1. Select the appropriate inventory type.



NOTE: You cannot have two inventory types on the same day. After selecting the inventory type, click the **print** icon in the upper left corner.

Unit 5		Inventory Worksheet - Landscape				Date Counted: ___/___/___	
						Type: WEEKLY	
1. FREEZER							
Description	Standard Unit	Std Cost	Count	Count	Count	Count	Count
PORK HAM JULIENNE	LB	\$2.32	CS=2/5LB	PACK=5LB			LB
GRAVY BEEF CONC	LB	\$0.95	CS=4/4LB	TUB=4LB			
GRAVY CHICKEN RST CONC	LB	\$1.02	CS=4/4LB	TUB=4LB			
BREAD CINNAMON SQUARES	LB	\$1.62	CS=186/1.5OZ				
ICING CREME CHEESE	LB	\$1.66	CS=12/2LB	BAG=2LB			
TURKEY SAUSAGE LINK	LB	\$3.16	CS=4/2.5LB	PACK=2.5LB			LB
CHICKEN TENDER MARINATED	LB	\$2.66	CS=4/5LB	BAG=5LB			LB
CHICKEN TENDERS RAW	LB	\$2.27	CS=8/5LB	BAG=5LB			LB
CHICKEN BREAST MAR.5OZ	LB	\$2.52	CS=6/5.25LB	BAG=5.25LB			LB

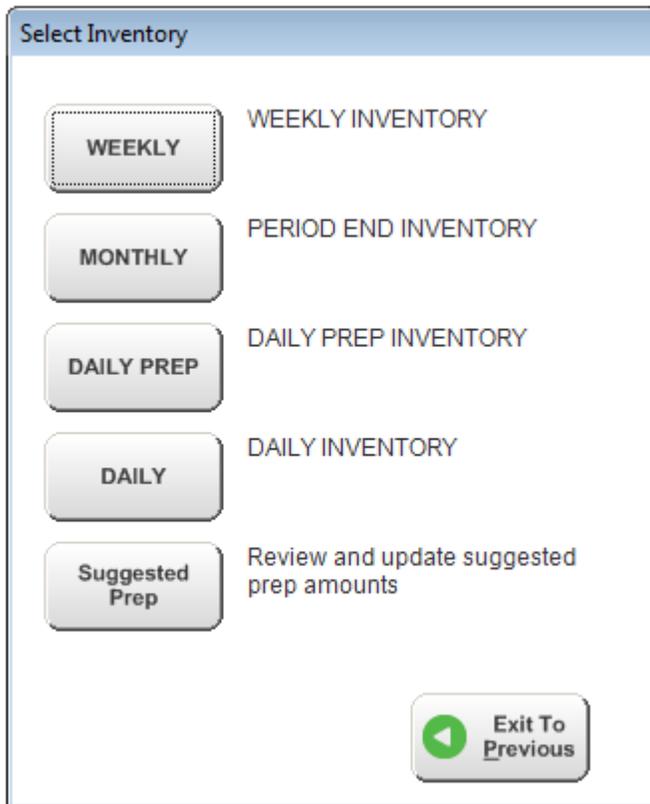
2. Click **Close** and **Exit to Previous** when you are finished.

Posting Inventory

1. From the Desktop, log in to NBO.
2. Click **Inventory and Prep**.



3. Click **Inventory Posting**. The Inventory Posting Selection dialog appears.



4. Choose Inventory Type:
 - **Weekly Food** – Weekly Inventory List
 - **Daily** – Daily Inventory

7. Use the arrows to move between counting locations. For example, Walk-In, Make table, etc.

<h2>Inventory - Posting by Location</h2>		Period: 4
Location #	1000077	Type WEEKLY FOOD
Description	Back Kitchen Storage1	Year: 2015
		<input type="button" value=" <"/> <input type="button" value="<"/> <input type="button" value=">"/> <input type="button" value="> "/>

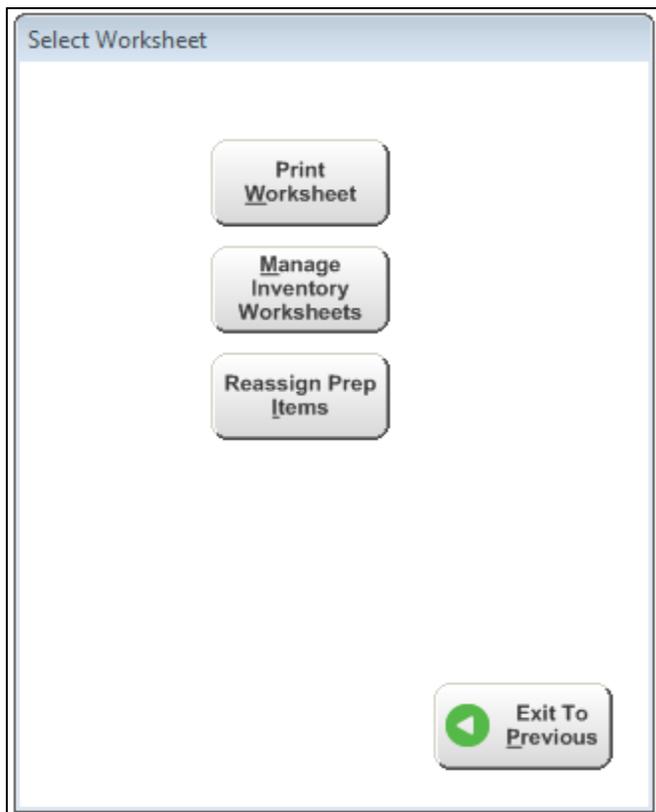
8. Add the count quantities to the corresponding blank above the correct count unit.
9. Click **Save**.

Working with Set-up and Maintenance of Inventory Worksheets

1. From the main Inventory Switchboard click **Inventory & Prep**.



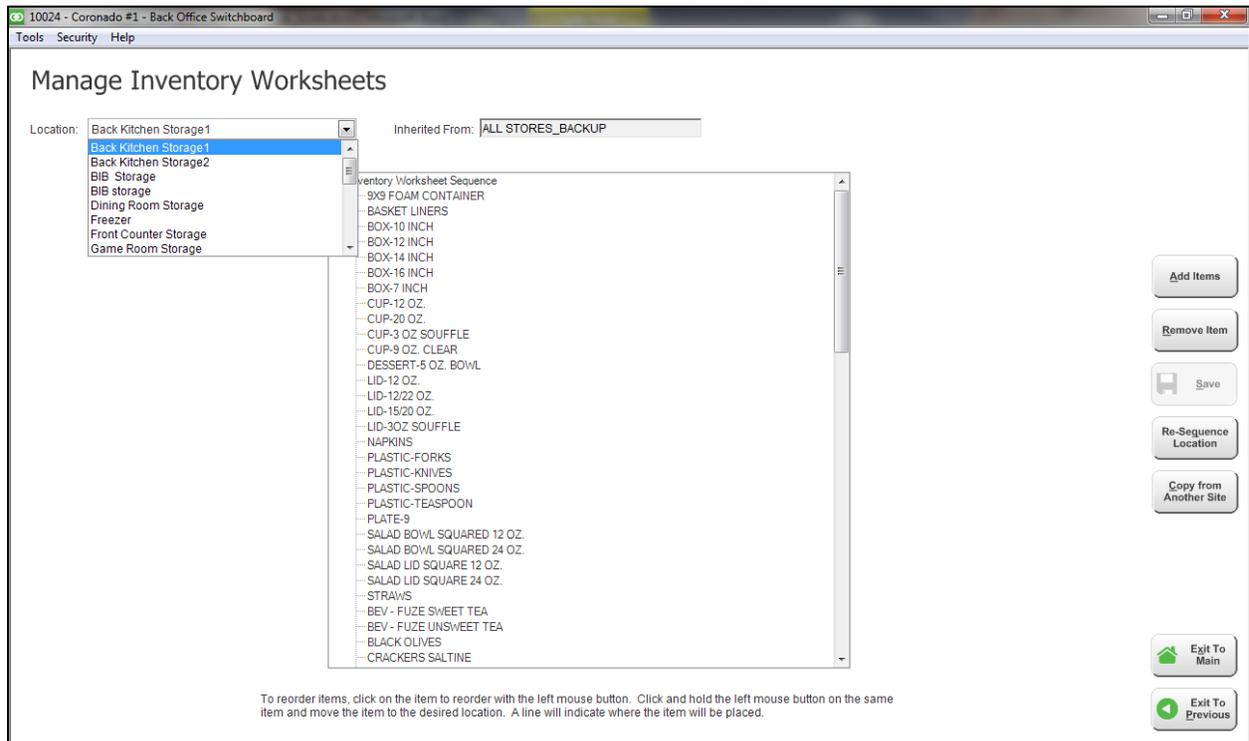
2. Click **Worksheets**.



Worksheets.

3. Select **Manage Inventory**

4. From the Location drop-down select which inventory location you wish to edit.

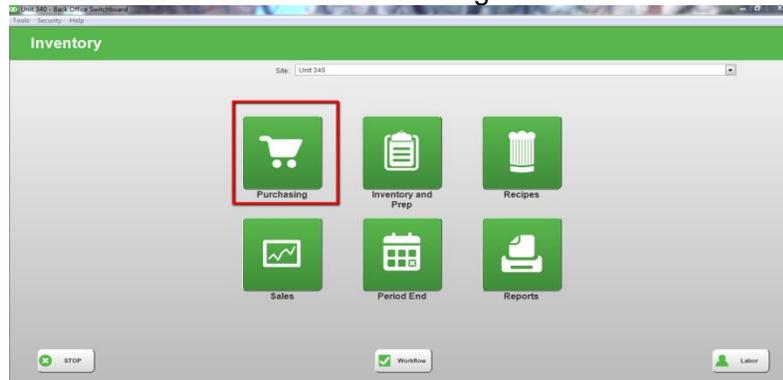


5. To re-order the worksheets, select an. To move hold down the right key of the mouse and drag the item to the desired position. The location of the item during drag is defined by a strong black line.
6. To remove and/or add an item, use the **Add Items** and **Remove Items** buttons.

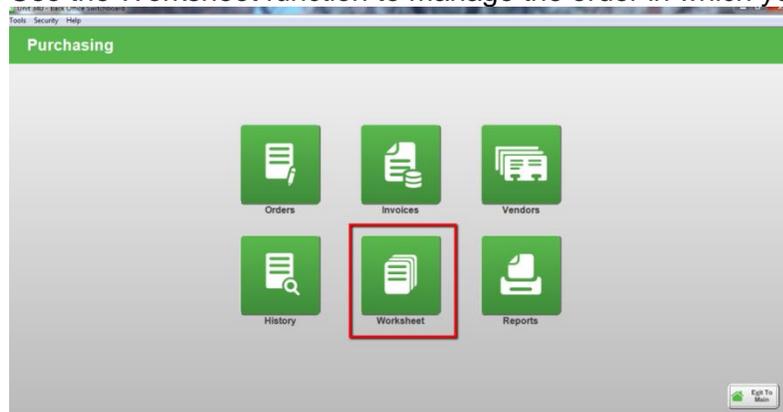
Manage Your Purchasing Worksheets

Self to sheet or managing your purchasing worksheets is one of the great aspects of the NBO inventory system. This allows you to add or delete approved purchase items along with sequencing the list for ease of use. You have the ability to organize your purchasing sheets (order guide) in 3 different ways (alphabetical, by category and by sheet to shelf). It is recommended to use sheet to shelf.

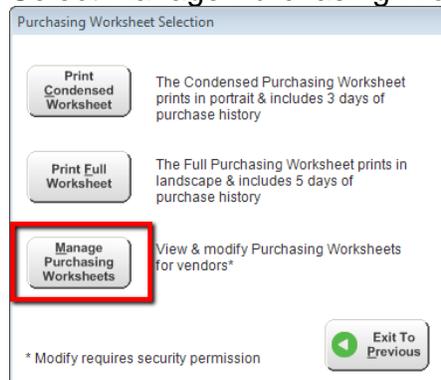
Access NBO and use the Purchasing Module



Use the Worksheet function to manage the order in which your purchasable items appear



Select Manage Purchasing Worksheets



Select the Vendor to manage, in this example we will use Gordon Food Service

Unit 340 - Back Office Switchboard

Tools Security Help

Purchasing Worksheets

Search: Vendor Name for

Vendor Name	Vendor ID	City	State or Province
ALFRED NICKLES BAKERY INC	95		
BOB EVANS FARMS	17		
CADILLAC COFFEE COMPANY	1252		
GORDON FOOD SERVICE	4358		
Local Bread Vendor	MISCBREAD		
Local Produce Vendor	MISCPROD		
LOCAL W/AFFLE	MISCVWAFFLE		
MISC PAID IN	MPI		
MISC PAID OUT	MPO		
NORTHERN BANK NOTE CO	3991		
VELVET ICE CREAM CO	1063		

Drag and Drop items in the order that you choose

Unit 340 - Back Office Switchboard

Tools Security Help

Manage Purchasing Worksheet

Vendor: GORDON FOOD SERVICE

Purchasing Worksheet Sequence

- BEANS GREEN - 0118737 (CS=6#10CAN) - (CS=6#10CAN) *
- OATMEAL STEEL CUT - 0620920 (CS=3/10 LB) - (CS=3/10 LB) *
- BREAD RYE - 0524382 (CS=10LOAF) - (CS=10LOAF) *
- CHERRIES MARASCHINO GARNI - 0602970 (CS=4LB) - (CS=4LB) *
- COATING BROASTER SLO-BRO - 0503001 (CS=40LB) - (CS=40LB) *
- COATING BROASTER TENDERS TBC - 0538313 (CS=40LB) - (CS=40LB) *
- COCONUT TOASTED - 0611700 (CS=3/1LB) - (CS=3/1LB) *
- COFFEE BREAKFAST BLEND - 0478011 (CS=100Z 75OZ) - (CS=100Z 75OZ) *
- COFFEE DECAF PREMIUM - 0478022 (CS=100Z 5OZ) - (CS=100Z 5OZ) *
- COFFEE REGULAR PREMIUM - 0662560 (CS=144Z 25OZ) - (CS=144Z 25OZ) *
- CRACKER SALTINE 2 PK - 0603031 (CS=500) - (CS=500) *
- CRANBERRIES DRIED - 0729469 (BAG=10LB) - (BAG=10LB) *
- CREAMER CINNAMON VAN PC - 0597630 (CS=180 CT) - (CS=180 CT) *
- CREAMER FRENCH VANILLA PC - 0137221 (CS=180 CT) - (CS=180 CT) *
- CREAMER HAZELNUT PC - 0137191 (CS=180 CT) - (CS=180 CT) *
- CROUTON BUTTER GARLIC - 0513912 (CS=5Z 25LB) - (CS=5Z 25LB) ***
- DRESSING BALSAMIC VIN LF - 0881970 (CS=4/1GAL) - (CS=4/1GAL) *
- DRESSING COLONIAL - 0606760 (CS=6/0.5GAL) - (CS=6/0.5GAL) *
- DRESSING FRENCH - 0606881 (CS=10/0.5GAL) - (CS=10/0.5GAL) *
- DRESSING IND VODONAL - 0609590 (CS=60/1.5OZ) - (CS=60/1.5OZ) *
- DRESSING IND FRENCH - 0609620 (CS=60/1.5OZ) - (CS=60/1.5OZ) *
- DRESSING IND HONEY MUSTD - 0250092 (CS=60/1.5OZ) - (CS=60/1.5OZ) *
- DRESSING IND SWEET ITAL - 0697320 (CS=60/1.5OZ) - (CS=60/1.5OZ) *
- DRESSING RASPBERRY RF - 0885730 (CS=2/1GAL) - (CS=2/1GAL) *
- DRESSING SWEET ITALIAN - 0702100 (CS=10/0.5GAL) - (CS=10/0.5GAL) *
- GRANOLA MULTI GRAIN - 0538772 (CS=6/1 LB) - (CS=6/1 LB) *
- GRITS - 0608841 (CS=8/5LB) - (CS=8/5LB) *
- HONEY - 0601690 (CS=1/2LB) - (CS=1/2LB) *

Vendor Items assigned to the worksheet display with the following information:
Item Name / Vendor Item Description - Vendor Item Code (Order Unit) - (Receive Unit)

The Purchasing Worksheet will now appear in order in which the manager sets

Unit 340 - Back Office Switchboard

Tools Security Help

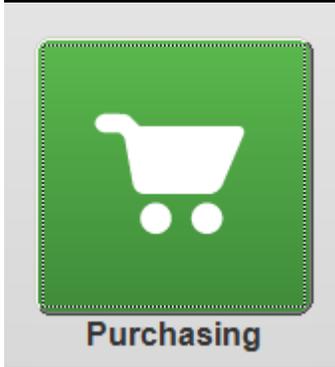
Manage Purchasing Worksheet

Vendor: GORDON FOOD SERVICE

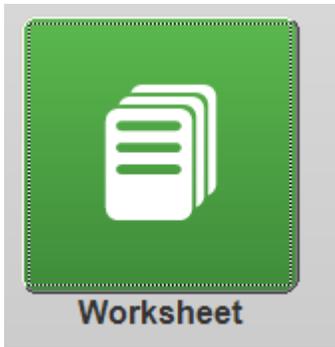
Purchasing Worksheet Sequence

- BEANS GREEN - 0118737 (CS=6#10CAN) - (CS=6#10CAN) *
- DRESSING BALSAMIC VIN LF - 0881970 (CS=4/1GAL) - (CS=4/1GAL) ***
- OATMEAL STEEL CUT - 0620920 (CS=3/10 LB) - (CS=3/10 LB) *
- BREAD RYE - 0524382 (CS=10LOAF) - (CS=10LOAF) *
- CHERRIES MARASCHINO GARNI - 0602970 (CS=4LB) - (CS=4LB) *
- COATING BROASTER SLO-BRO - 0503001 (CS=40LB) - (CS=40LB) *
- COATING BROASTER TENDERS TBC - 0538313 (CS=40LB) - (CS=40LB) *
- COCONUT TOASTED - 0611700 (CS=3/1LB) - (CS=3/1LB) *
- COFFEE BREAKFAST BLEND - 0478011 (CS=100Z 75OZ) - (CS=100Z 75OZ) *
- COFFEE DECAF PREMIUM - 0478022 (CS=100Z 5OZ) - (CS=100Z 5OZ) *
- COFFEE REGULAR PREMIUM - 0662560 (CS=144Z 25OZ) - (CS=144Z 25OZ) *
- CRACKER SALTINE 2 PK - 0603031 (CS=500) - (CS=500) *
- CRANBERRIES DRIED - 0729469 (BAG=10LB) - (BAG=10LB) *
- CREAMER CINNAMON VAN PC - 0597630 (CS=180 CT) - (CS=180 CT) *
- CREAMER FRENCH VANILLA PC - 0137221 (CS=180 CT) - (CS=180 CT) *
- CREAMER HAZELNUT PC - 0137191 (CS=180 CT) - (CS=180 CT) *
- CROUTON BUTTER GARLIC - 0513912 (CS=5Z 25LB) - (CS=5Z 25LB) *
- DRESSING COLONIAL - 0606760 (CS=6/0.5GAL) - (CS=6/0.5GAL) *
- DRESSING FRENCH - 0606881 (CS=10/0.5GAL) - (CS=10/0.5GAL) *

Printing A GFS Order Guide



Click into Worksheets



Click into Print Condensed order guide

Purchasing Worksheet Selection

Print Condensed Worksheet	The Condensed Purchasing Worksheet prints in portrait & includes 3 days of purchase history
Print Full Worksheet	The Full Purchasing Worksheet prints in landscape & includes 5 days of purchase history
Manage Purchasing Worksheets	View & modify Purchasing Worksheets for vendors*

* Modify requires security permission

Exit To Previous

Select GFS

Report Parameter Selection

Suggested Order

Vendor Name:

- ALFRED NICKLES BAKERY INC
- BOB EVANS FARMS
- GORDON FOOD SERVICE**
- Local Bread Vendor
- Local Produce Vendor
- LOCAL WAFFLE
- MISC PAID IN
- MISC PAID OUT

Cancel OK

Ensure suggested order dates are correct. These will populate automatically when you start an order on the day it is due.
Click **OK**

Report Parameter Selection

Suggested Order

Vendor Name: GORDON FOOD SERVICE

Suggested Order

From 12/17/2015 To 12/20/2015

Cancel OK

Unit 5

Purchasing Worksheet

Start Date: 12/17/2015

End Date: 12/20/2015

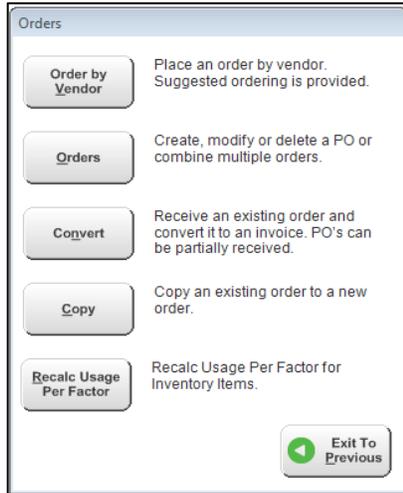
Vendor: GORDON FOOD SERVICE
Vendor ID: 4358

Description	Vendor Code	UOM	Req'd	Open P.O.'s	Theory On-Hand	Actual On-Hand	Suggest Order	Actual Order	Purchase History			
									Qty Received	Date Received	Date Ordered	
BAKING POWDER	0433718	CS=6/5LB	0.04	0.00	0.09		0					
OATMEAL STEEL CUT	0620920	CS=3/10 LB	0.00	0.00	0.00		0					
BEANS GREEN	0118737	CS=6/#10CAN	1.14	2.00	2.87		0		2 - 12/15	2 - 12/10	2 - 12/8	
BEANS NAVY	0555473	CS=6/#10CAN	0.20	2.00	0.32		0		2 - 12/15	1 - 12/1	1 - 11/5	
BEVERAGE DASANI BOTI	0502271	CS=24CT	0.02	0.00	0.13		0		1 - 12/1			
BREAD RYE	0524382	CS=10LOAF	0.49	0.00	0.79		0		1 - 12/1	1 - 11/10	1 - 10/22	
CHERRIES MARASCHINO	0602970	CS=6LB	0.05	0.00	0.25		0		1 - 10/27			
COATING BROASTER SLC	0503001	CS=40LB	0.04	0.00	0.87		0		1 - 11/26	1 - 11/17	1 - 11/10	
COATING BROASTER TEN	0583813	CS=40LB	0.34	0.00	1.44		0		1 - 12/10	1 - 12/8	1 - 11/26	
COCONUT TOASTED	0611700	CS=3/1LB	0.02	0.00	1.33		0					

- The order will populate all the information shown- name, vendor code, Unit of measure, Required, Open PO's, Theory on hand, suggested order and your purchasing history for that product, the last 3 times you ordered it.
- Required= Amount of product that will be needed for the sales that are forecasted.
- Open PO's= product that has been order but not finalized in the system
- Theory on hand= last inventory count + purchases- sales of that product.
- Suggested order= a rounded amount of food needed to get through the sales period based on required and theory on hand.
- Suggested ordering is a great feature in the NCR inventory system because it will help you manage your inventory more effectively. Suggested order is based on forecasted sales mix and theoretical on hand inventory. Theoretical on hand is a great feature for real time on hand. For this be accurate and useful, you must insure that all food PO's are finalized and you have accurate inventory counts.

Placing a GFS Electronic Purchase Order

1. From the Desktop, log into NBO.
2. From the NBO Main Inventory Switchboard click **Purchasing**.
3. Click on **Orders**.
4. Click on **Order By Vendor**.
5. Select GFS.



Unit 340 - Back Office Switchboard

Tools Security Help

Purchasing - Order by Vendor

Vendor Name: Vendor ID: 4338.17001

Purchase Order ID: Delivery Date: 12/18/2015

Suggested Order From: 12/16/2015 To: 12/21/2015 Memo:

Add Category

Order	Sug'd Order	Actual Order	Vendor Code	Item Name	Order Unit	Req'd Qty	Open POs	Current On-Hand	Line
▶	<input type="checkbox"/>	0	* 0433718	BAKING POWDER	CS-6#5LB	0.07	0.00	2.00	0
	<input type="checkbox"/>	0	* 0118737	BEANS GREEN	CS-6#10CA	2.04	0.00	5.00	0
	<input type="checkbox"/>	0	* 0555473	BEANS NAVY	CS-6#10CA	0.51	0.00	1.72	0
	<input type="checkbox"/>	0	* 0502271	BEVERAGE DASANI BOTTL	CS-24CT	0.00	0.00	0.00	0
	<input type="checkbox"/>	0	* 0524382	BREAD RYE	CS-10LOAF	0.82	0.00	4.40	0
	<input type="checkbox"/>	0	* 0793350	BREAD TEXAS TOAST	CS-1222OZ	0.00	0.00	1.29	0
	<input type="checkbox"/>	0	* 0710650	BREAD WHEAT	CS-1222OZ	2.13	0.00	2.14	0
	<input type="checkbox"/>	0	* 0710640	BREAD WHITE	LOAF-32OZ	12.49	0.00	17.68	0
	<input type="checkbox"/>	0	* 0602970	CHERRIES MARASCHINO G	CS-6LB	0.10	0.00	1.17	0
	<input type="checkbox"/>	0	* 0503001	COATING BROASTER SLO-	CS-40LB	0.08	0.00	2.05	0
	<input type="checkbox"/>	0	* 0583813	COATING BROASTER TEN	CS-40LB	0.47	0.00	1.02	0
	<input type="checkbox"/>	0	* 0611700	COCONUT TOASTED	CS-3#1LB	0.07	0.00	2.00	0
	<input type="checkbox"/>	0	* 0478011	COFFEE BREAKFAST BLEN	CS-100#2.75	0.00	0.00	14.11	0
	<input type="checkbox"/>	0	* 0478022	COFFEE DECAF PREMIUM	CS-100#2.50	0.47	0.00	6.93	0
	<input type="checkbox"/>	0	* 0662660	COFFEE REGULAR PREMI	CS-144#2.25	1.00	0.00	2.00	0
	<input type="checkbox"/>	0	0688931	CRACKER SALTINE 2 PK.	CS-500				0
	<input type="checkbox"/>	0	* 0729469	CRANBERRIES DRIED	BAG-10LB	0.52	0.00	2.19	0
	<input type="checkbox"/>	0	* 0597630	CREAMER CINNAMON VAN	CS-180 CT	0.88	0.00	0.99	0
	<input type="checkbox"/>	1	* 0137221	CREAMER FRENCH VANILL	CS-180 CT	1.76	0.00	0.98	0
	<input type="checkbox"/>	1	* 0137191	CREAMER HAZELNUT PC	CS-180 CT	1.76	0.00	0.98	0
	<input type="checkbox"/>	0	* 0513912	CROUTON BUTTER GARLI	CS-5#2.25LB	0.35	0.00	1.09	0
	<input type="checkbox"/>	0	* 0881970	DRESSING BALSAMIC VIN	CS-4#1GAL	0.00	0.00	1.25	0

*Suggest on PO. Suggest on PO items have the current levels and suggested amounts for the item regardless of Vendor Code.

Toggle Search → Use "Toggle Search" to search for an item in the PO that you would like to order

By Location → Use "By Location" to organize the order sheet by their inventory location

Save → Use the "Save" button when you want to save an order and return to it later for review

Update Suggested Order

Accept All → Use "Accept All" to accept any suggestions made in the "Suggested Order" column of the PO

Print → Use "Print" to print the PO

Add To This Order → Another method of adding an item to the order

Send Order Now → When order is complete press "Send order Now" to send electronically to configured vendors

Exit To Main → Use the "Exit to Main" and "Exit to Previous" buttons to exit to a previous screen. You will be prompted to "Save" when you move back to the previous or Main screen

Exit To Previous

Order" is the span of days you need to order food for

Buttons

- Toggle search- Search for items that are not order very often.
- Accept all- Use "Accept all" to accept all suggested order recommendations.
- Save- Use the save button when you want to save your work but not send the final order.
- Add to this order- Another method of adding an item to the order.
- Send order now- When order is complete, press send order now to complete process.

Purchasing - Order by Vendor

Vendor Name: ROMAFOOD Vendor ID: ROMA2007

Purchase Order ID: 10 Due Date: 4/8/2015

Suggested Order: From 4/5/2015 To 4/5/2015

Add Category

Order	Qty'd Order	Actual Order	Order Unit	Vendor Code	Item Name	Rec'd Qty	Open POs	Current On-Hand	Line
25	0	*	CS-000	427529	8V8 FOAM CONTAINER	0.00	0.00	1.00	0
25	0	*	CS	95911	BAG PLUS FOOD CLP	0.00	0.00	8.00	0
25	0	*	CS	97267	BAG PLUS SADDLE VHW LOGO	0.00	0.00	11.00	0
25	0	*	CS	97262	BAG POLY CLP BODYS	0.00	0.00	15.00	0
25	0	*	CS	95469	BAG SANDWICH CLP SADDLE E&X	0.00	0.00	7.00	0
25	0	*	CS	98741	BAG Y-SM THAWK YOU 11 ONE 502	0.00	0.00	11.00	0
25	0	*	CS	97264	BALLOON F-RND NON-PRINTED	0.00	0.00	7.00	0
25	0	*	CS-4 BNCB	434185	GARRET EMBERS	0.00	0.00	0.20	0
25	0	*	CS	98697	SANDY OVAL RED PLUS	0.00	0.00	1.00	0
25	0	*	CS-24 BAG	291777	BEV FLZE SHEET TEA	0.00	0.00	0.00	0
25	0	*	CS-4 GAL	63513	BEV-BB ROOT BEER	0.00	0.00	0.00	0
25	0	*	CS-8 BAG	985219	BEV FLZE UNSWEET TEA	0.00	0.00	0.00	0
25	0	*	CS-4 GAL	93438	BEV-BB COKE CHERRY	0.00	0.00	0.00	0
25	0	*	CS-4 GAL	CC03879	BEV-BB COKE CLASSIC	0.00	0.00	0.00	0
25	0	*	CS-4 GAL	CC03988	BEV-BB COKE DIET	0.00	1.00	0.00	0
25	0	*	CS-4 GAL	93764	BEV-BB DIET DR PEPPER	0.00	0.00	0.00	0
25	0	*	CS-4 GAL	DRP9303	BEV-BB DR PEPPER	0.00	0.00	0.00	0
25	0	*	CS-4 GAL	CC03862	BEV-BB H-C PPRN PRNK LEMONAD	0.00	0.00	0.00	0
25	0	*	CS-4 GAL	CC03935	BEV-BB H-C FRUIT PUNCH	0.00	0.00	0.00	0
25	0	*	CS-4 GAL	93444	BEV-BB ORANGE	0.00	0.00	0.00	0
25	0	*	CS-4 GAL	CC0397010	BEV-BB RASPBERRY TEA	0.00	0.00	0.00	0
25	0	*	CS-4 3 GAL	CC0162626	BEV-BB SPORT MNTN BLAST	0.00	0.00	0.00	0
25	0	*	CS-4 GAL	CC03862	BEV-BB SPRITE	0.00	0.00	0.00	1

*Suggest on PO: Suggest on PO items have the current levels and suggested amounts for the item regardless of vendor Code

Using the numbers pad and the tab key, enter your order into this order guide.

NOTE: The **Suggested Order** column will show a suggested order amount based on sales mix and theoretical inventory levels. It is highly recommended to take it into account what the suggested order amount is and possibly re-verify your actual inventory if the suggested order varies significantly from the actual order amount.

Save and send order.
Once you're finished, press the **Send Order Now** button.

Toggle Search

By Location

Save

Update Suggested Order

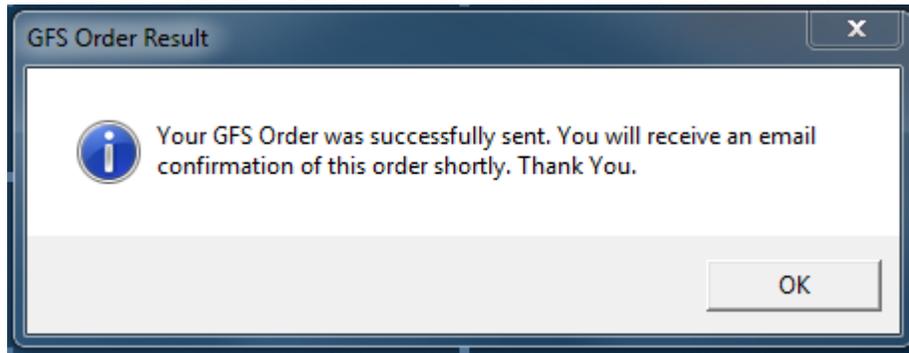
Accept All

Print

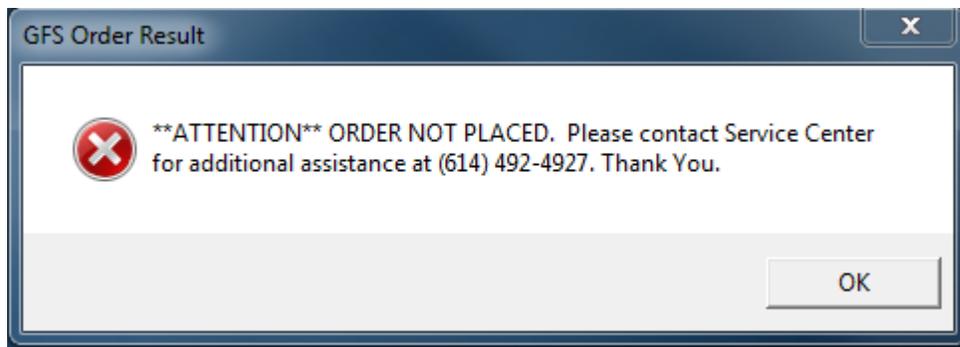
Add To This Order

Send Order Now

Receive a confirmation screen that says order was successfully sent.
This means that the order was sent and not that GFS has received it.



If you receive an error, please follow the directions on the error message.



Review GFS purchase order acknowledgment for confirmation the order was received via email.

This is also a great way to ensure that you will receive everything you ordered.

Gordon Food Service Customer Purchase Order Acknowledgment

Customer Nbr	PO Nbr	Verification Nbr	Ship Date	Status	
100044892	9	9919068	08/21/2015	See Detail Status Line	
Item #	Description	Qty Ordered	Qty Shipped	Unit Price	Status
416442	CHEESE GOAT CRMBL 2-2# SARG	1	0	0.000	Temporary Stock Out
483692	JUICE ORNG 4-120FLZ FLNAT	6	0	0.000	Invalid Item
500153	ITEM DOES NOT EXIST	1	0	0.000	Invalid Item
876440	PUMPKIN CANNED 6-#10 FLAV-R-PAC	1	0	0.000	Invalid Item
231050	SOUP CHILI RESTAURANT 10-4# BOB EVANS	1	1	52.610	ok

Finalizing a GFS Electronic Invoice

Restaurant locating a "Pending" Invoice for Review

From the main NBO Managers home screen they would select Inventory -> Purchasing -> Invoices -> Show Pending.

They must make sure the correct radio button is selected.

The Restaurant Manager can then select the Invoice of choice for review before approving or rejecting it.

Show Pending

All
 Reject
 Not Rejected

Search for

 Start Date End Date

Invoice ID	Invoice Date	Delivered Date	Delivered Time	Vendor Name	Total	Accept	Final	Reject	Invalid
▶ 168317016	02/16/2016			GORDON FOOD	\$5,089.64	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1683170169	02/16/2016			GORDON FOOD	\$5,089.64	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Once inside the Invoice you can review the details of the order and ensure that all amount/ dollar totals match. When all totals match, click finalize and exit.

Vendor: Due:

Vendor I

Search for

Line	Vendor Code	Item Name	Units	Received Qty	Price	Tax	Total
▶ 1	0330078	JELLY APPLE BUTTER	CS=200/ 5OZ	1.000	\$14.030	\$0.000	\$14.030
2	0433718	BAKING POWDER	CS=6/5LB	1.000	\$6.410	\$0.000	\$6.410
3	0118737	BEANS GREEN	CS=6/#10CAN	1.000	\$18.970	\$0.000	\$18.970
4	0860310	OIL BUTTERY TFF	CS=35LB	1.000	\$24.990	\$0.000	\$24.990
5	0253170	TOPPING CINNAMON FLAKES	CS=15LB	1.000	\$34.250	\$0.000	\$34.250
6	0250092	DRESSING IND HONEY MUSTD	CS=60/1.5OZ	1.000	\$11.570	\$0.000	\$11.570
7	0606590	DRESSING IND COLONIAL	CS=60/1.5OZ	2.000	\$9.350	\$0.000	\$18.700
8	0606620	DRESSING IND FRENCH	CS=60/1.5OZ	1.000	\$9.400	\$0.000	\$9.400
9	0697320	DRESSING IND SWEET ITAL	CS=60/1.5OZ	2.000	\$10.590	\$0.000	\$21.180
10	0885790	DRESSING RASPBERRY RF	CS=2/1GAL	1.000	\$18.750	\$0.000	\$18.750
11	0601660	HONEY	CS=12/1LB	1.000	\$35.240	\$0.000	\$35.240
12	0254983	JELLY STRAWBERRY JAM	CS=200/ .5OZ	1.000	\$13.270	\$0.000	\$13.270
13	0602080	JELLY BLACKBERRY DIET	CS=200/ .5OZ	1.000	\$12.750	\$0.000	\$12.750
14	0254975	JELLY GRAPE	CS=200/ .5OZ	1.000	\$10.340	\$0.000	\$10.340

Subtotal (incl. ta)
 Sales Tax:
 Freight:
 Total Amount Paya

Restaurant Locating a “Credit” Invoice (Adjustment)

From the main NBO Managers home screen select Inventory -> Purchasing -> Invoices
 A credit Invoice also known as an adjustment invoice will display on the main Invoice window in NBO.

A credit can usually be identified by two ways.

- The first way will show a reference to the original Invoice that contained the charge and will display in the first Column under “Original Invoice ID”
- The second method to identify a credit adjustment will be in the Total Column. This Column will display the amount in a parenthesis. This is a normal account practice to show a credit amount.

Invoice Selection

Search: Invoice ID for  

Start Date: 2/1/2016 End Date: 2/26/2016

Display Options
 All
 Finalized
 Unfinalized

Original Invoice ID	Invoice ID	Invoice Date	Delivered Time	Vendor Name	Total	Finalized	Reject
122112		02/23/2016	2/23/2016 4:55 PM	CADILLAC COFFEE COMPANY - CLEV	\$1,015.20	<input type="checkbox"/>	<input type="checkbox"/>
168433801	CM1684338017	02/09/2016	2/24/2016 4:05 PM	GORDON FOOD SERVICE - PALATINE	(\$76.74)	<input type="checkbox"/>	<input type="checkbox"/>

If the adjustment was just older than the invoice. Setting the date range back using the “Start Date” and “End Date” setting should revealed it.

When searching for the original Invoice changes to the Display Options radio button may be needed.

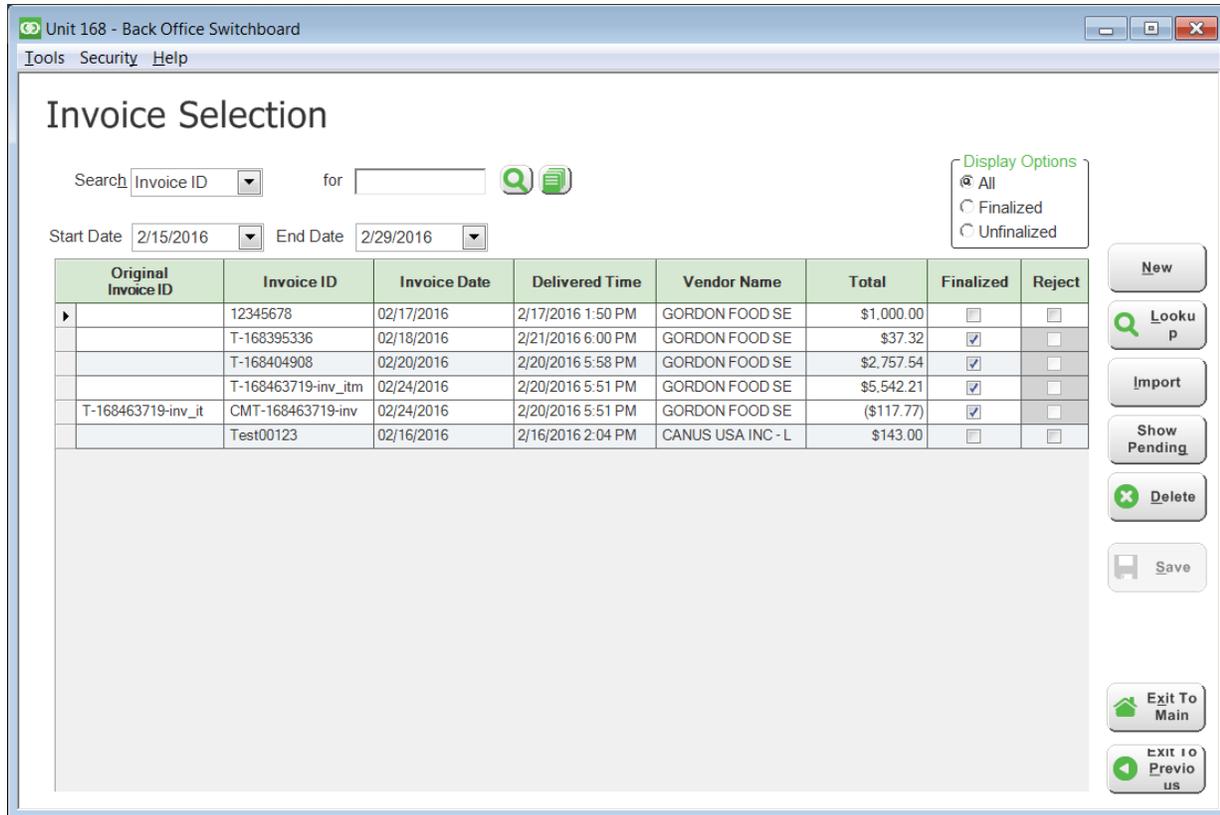
Using the **Unfinalized** filter even if the original is finalized, viewed on the same screen as the invoices.

At the login of NBO an **Unfinalized Invoice** pop up may display advising the user action is needed.

Once the Restaurant manager has located and reviewed the information they may follow normal business rules to finalize it.

Restaurant viewing “Finalized” Invoice

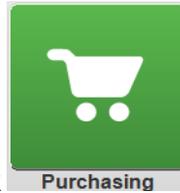
1. From the main NBO Managers home screen they would select Inventory -> Purchasing -> Invoices.
2. From this screen a Restaurant manager can view recent finalized invoices.
 - Changing the date range will allow for older invoices to be retrieved should additional research or viewing be required.
 - Changing the “Display Options” radio button at the top will allow for the user to only view the invoices that have been “finalized.”
3. Invoices that have been “Finalized” can easily be identified by the check mark located in the “Finalized” Column.



4. Once the “finalized” Invoice has been located the user may double click to open it and view the contents.
5. Options within the “finalized” invoice will be limited. Changes should only be made following the approved SOPs.

Manually Posting an Invoice

1. From the Desktop, log in to NBO.



2. From the NBO Main Inventory Switchboard click **Purchasing Purchasing.**



3. Click **Invoices Invoices.** The Invoice Selection screen appears.

Invoice Selection

Search: Invoice ID for [] [] []

Start Date: 3/22/2015 End Date: 4/5/2015

Display Options: All, Finalized, Unfinalized

Original Invoice ID	Invoice ID	Invoice Date	Delivered Time	Vendor Name	Total	Finalized	Reject
095538	04/04/2015	44/2015 8:42 AM	NATIONAL RESTAURANT S	\$307.69	[x]	[]	
095604	04/04/2015	44/2015 8:44 AM	NATIONAL RESTAURANT S	\$21.91	[x]	[]	
1619387	04/04/2015	44/2015 8:41 AM	COZZINI BROS., INC.	\$29.23	[x]	[]	
210670369	03/23/2015	3/23/2015 4:13 PM	PRUDENTIAL OVERALL SU	\$103.27	[x]	[]	
210673117	03/31/2015	3/31/2015 9:48 AM	PRUDENTIAL OVERALL SU	\$58.06	[x]	[]	
42089904	03/27/2015	3/27/2015 1:20 PM	ROMA FOOD	\$5,688.25	[x]	[]	
42084020	03/28/2015	3/28/2015 8:39 AM	ROMA FOOD	\$5,432.39	[x]	[]	
42125669	04/01/2015	4/1/2015 9:20 AM	ROMA FOOD	\$5,165.04	[x]	[]	
42155110	04/04/2015	44/2015 8:13 AM	ROMA FOOD	\$3,259.91	[x]	[]	
518256	03/23/2015	3/23/2015 7:23 AM	QUALITY FRUIT & VEGETAB	\$58.03	[x]	[]	
518652	03/24/2015	3/24/2015 8:10 AM	QUALITY FRUIT & VEGETAB	\$76.13	[x]	[]	
519033	03/27/2015	3/27/2015 1:15 PM	QUALITY FRUIT & VEGETAB	\$83.60	[x]	[]	
519356	03/26/2015	3/26/2015 7:55 AM	QUALITY FRUIT & VEGETAB	\$105.12	[x]	[]	
519672	03/27/2015	3/27/2015 1:48 PM	QUALITY FRUIT & VEGETAB	\$154.06	[x]	[]	
520072	03/28/2015	3/28/2015 9:37 AM	QUALITY FRUIT & VEGETAB	\$45.37	[x]	[]	
520380	03/29/2015	3/29/2015 8:44 AM	QUALITY FRUIT & VEGETAB	\$48.87	[x]	[]	
520505	03/30/2015	3/30/2015 9:46 AM	QUALITY FRUIT & VEGETAB	\$93.34	[x]	[]	
520900	03/31/2015	3/31/2015 9:47 AM	QUALITY FRUIT & VEGETAB	\$31.50	[x]	[]	
521035	04/01/2015	4/1/2015 9:17 AM	QUALITY FRUIT & VEGETAB	\$72.95	[x]	[]	
521531	04/02/2015	4/2/2015 7:32 AM	QUALITY FRUIT & VEGETAB	\$223.05	[x]	[]	
521957	04/03/2015	4/3/2015 8:52 AM	QUALITY FRUIT & VEGETAB	\$160.73	[x]	[]	
522379	04/04/2015	44/2015 1:18 PM	QUALITY FRUIT & VEGETAB	\$123.84	[x]	[]	
601132893	03/28/2015	3/28/2015 1:33 PM	GLAZER'S INC	(\$30.00)	[x]	[]	
670966988	04/04/2015	44/2015 8:39 AM	VW GRANGER	\$13.99	[x]	[]	

4. Click **New**. The Purchasing – Invoices screen appears.

Purchasing - Invoices

Invoice ID: [] Vendor: [] Vendor ID: []

Delivered Time: 4/5/2015 5:00 PM

Invoice Date: 4/5/2015 Due Date: [] Check No.: []

Search: Item Name for [] [] []

Line	Vendor Code	Item Name	Receive Unit	Ordered	Received	Price	Total
1							

Subtotal: \$0.000
Sales Tax: \$0.000
Freight: \$0.000
Total Amount Payable: \$0.000

- Type the Invoice number in the **Invoice ID** field.
NOTE: The Invoice ID is a required field and can be found on the hard copy of the original invoice.
- Use the drop-down arrow to choose the vendor.

- Use the drop-down arrow to choose the date of the invoice.

- Choose the **Due** date for the invoice.
- Choose the **Delivered Date/Time**. **NOTE:** The Delivered Date will determine which fiscal week the invoice is going to be credited for.

Enter Line Items for the Invoice

For certain vendors such as your main food suppliers, the items catalogue can be found by clicking the down arrow in the individual lines. For vendors that don't have any items associated with them, press the **Find** hyperlink.

1. Select the item and tab to the **received** field and type the number of units received. Some items may be purchased in different units, therefore be sure to select the correct one.
2. Tab to the **price** field and type the price per unit. The system will calculate the total price based on units received and price per unit.
3. Verify and correct the price per unit as necessary.
4. Continue adding line items until complete.
5. After all line items are entered, verify that the **Total Amount Payable** equals the total of the original invoice.

Subtotal:	\$138.450
Sales Tax:	\$0.00
Freight:	\$0.00
Total Amount Payable:	\$138.450

6. Click **Save**.
7. Press **Finalize** when you're certain that no other adjustments or changes have to be made.

NOTE: Once an Invoice has been finalized, you will not be able to make any more changes to it. Only your Area Supervisor or System Administrator can un-finalize an Invoice.

Working with Bob Evans Restaurant Suggested Prep and Interval Prep

- Perform daily prep count of all prep items (After 8pm, the prior night).
- Ensure areas are organized and ready to count.
- Ensure iPad with Pulse is set up to count all prep items.
- Count all prep products that do not expire at end of day.
- Count all items 6 days a week (Thursday to Tuesday). Do not count Wednesday.
- Count should happen after 8:00pm and when sales are less than \$150 an hour.
- Count on IPAD

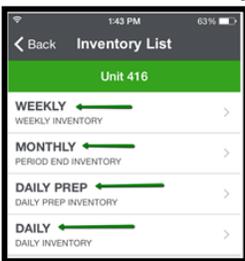
1. Log into Pulse App with your credentials



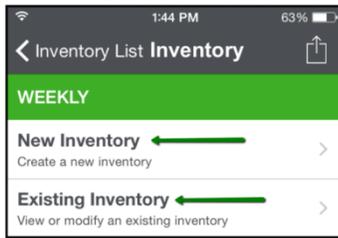
2. Select Inventory.



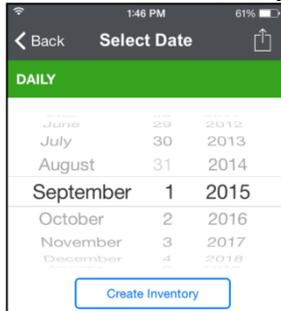
3. Select the type of Inventory you would like to perform - Daily Prep.



4. Select if it is a New or Existing Inventory Count



5. Select the Day you would like to count



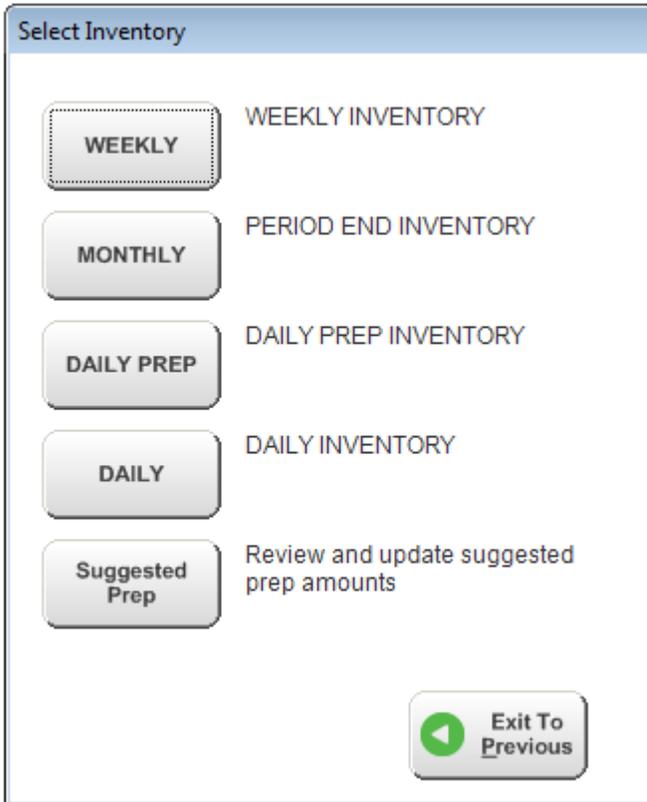
To begin your counts:

- You **must** be completely connected to Wi-Fi when you select your inventory list. This gives the device an opportunity to connect with NCR Back Office (NBO) and tell it what is on the list you are about to count → it is absolutely necessary to be connected to Wi-Fi when starting a new inventory. You **must** pull up the location count sheet **before** proceeding to the WIFI free area. You will **not** be able to pull up a count sheet in a Wi-Fi free zone.
- You can now enter an area that has **no** Wi-Fi signal and begin your count.
- Make sure that you return to an area that has Wi-Fi when you “Post” your inventory. The Pulse app will not let you post the inventory unless you are connected to the Wi-Fi.

Execute suggested prep:

NOTE: The Opening workflow incorporates the suggested prep process by taking the manager directly to Suggested prep step c.

1. Click inventory prep.
2. Click inventory posting.
3. Click suggested prep.



4. Ensure current date and click continue.

Prep Posting Selection Dialog

New Existing

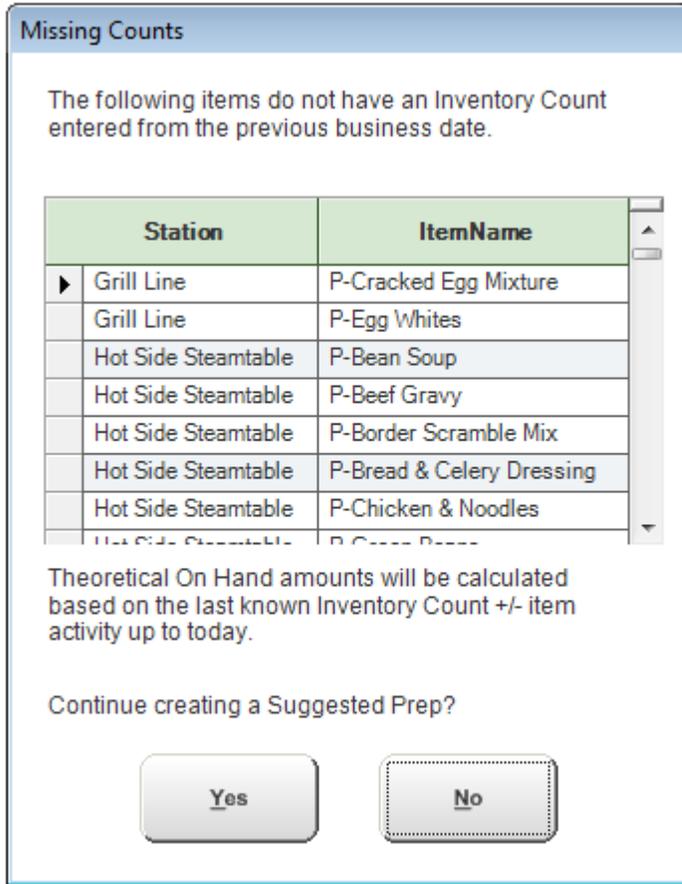
Prep Date

Date: 2/16/2016

Continue

Exit To Previous

5. The missing count screen appears for items that have no ending inventory.
6. Click **No** to enter counts or click **Yes** and the system will use the theory on hand calculations.



7. Suggested prep will appear.
8. Review each prep station for theory on hand accuracy and suggested prep amounts.
Suggested prep is calculated by subtracting the on hand from the forecasted sales mix.

Prep - Update Suggested

Station: Oven Date: 2/16/2016

Item Name	Make This Unit 1x Batch =	Shelf Thaw	Theory O/H	Theory Expe	Adj. O/H	Sug. Make This	Adj. Make This	History Day 1	History Day 2	History Day 3	History Day 4	History Day 5	Comments
P-Baked Potatoes*	1.00-EA	1	7.0	-7.0		11.0		Thu 2/11 9	Wed 2/10 0	Sun 2/7 1	Sat 2/6 7	Fri 2/5 2	
	1.00-EA												
P-Blanched Bacon*	1.00-BATCH=1BAG	1	0.4	-0.4		1.0		Thu 2/11 0	Wed 2/10 1	Sun 2/7 1	Sat 2/6 1	Fri 2/5 1	
	1.00-BATCH=1BAG												
P-Sausage Links*	1.00-TRAY	2	9.8	-9.8		10.0		Thu 2/11 11	Wed 2/10 0	Sun 2/7 0	Sat 2/6 0	Fri 2/5 0	
	1.00-TRAY												
P-Slow Roast Chicken*	1.00-BATCH=10LB BAG	2	0.0	0.0		2.0		Thu 2/11 0	Wed 2/10 0	Sun 2/7 0	Sat 2/6 0	Fri 2/5 2	
	1.00-BATCH=10LB BAG												
P-Brioche Bread*	1.00-BATCH=1LOAF	3	26.0	-26.0		20.0		Thu 2/11 0	Wed 2/10 0	Sun 2/7 0	Sat 2/6 28	Fri 2/5 31	
	1.00-BATCH=1LOAF												
P-Portabella Mushrooms*	1.00-BATCH=1LB	3	13.7	-13.7		10.0		Thu 2/11 15	Wed 2/10 10	Sun 2/7 13	Sat 2/6 15	Fri 2/5 15	
	1.00-BATCH=1LB												

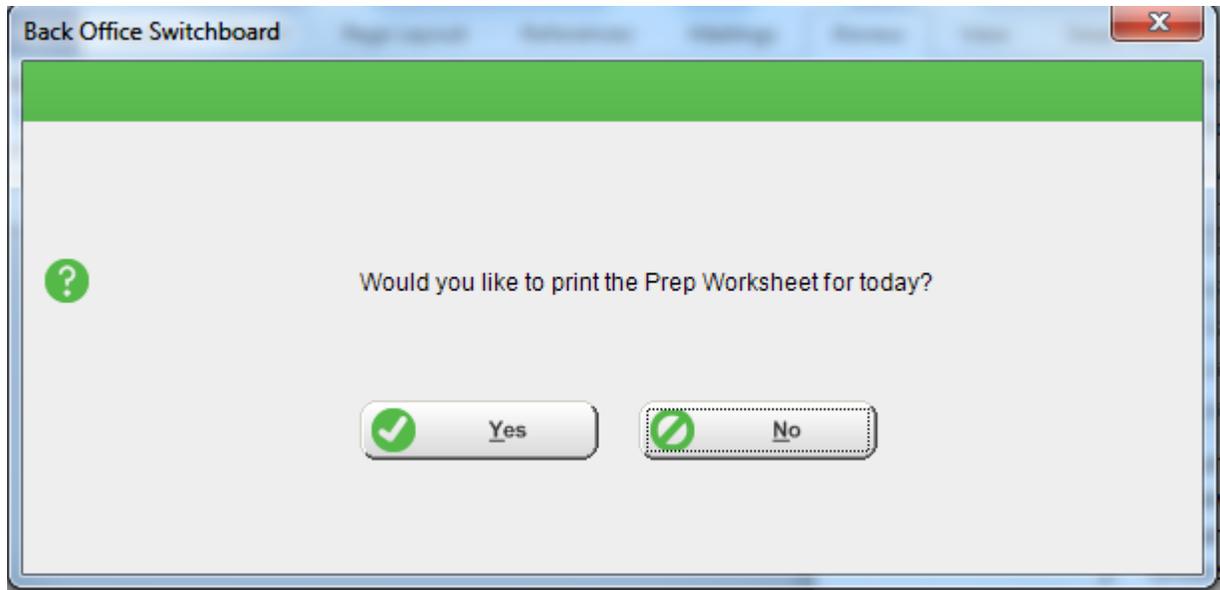
9. Adjust on hand field if inaccurate. If changes are made, click recalculate.
10. Review suggested make column and decide if accurate. If accurate, skip to step J.
 - If changes need to be made, input the updated amounts in the adjusted make this column.
11. Once suggested prep list is done with correct counts click save.

Prep - Update Suggested

Station: Date: 2/16/2016

Item Name	Make This Unit by Batch --	Shelf Thaw	Theory O/H	Theory Expn	Adj. O/H	Sug Make This	Adj. Make This	History Day 1	History Day 2	History Day 3	History Day 4	History Day 5	Comments
P-Baked Potatoes*	1.00-EA	1	7.0	-7.0		11.0		Thu 2/11 9	Wed 2/10 0	Sun 2/7 0	Sat 2/6 1	Fri 2/5 2	
P-Blanched Bacon*	1.00-BATCH+1BAG	1	0.4	-0.4		1.0		Thu 2/11 0	Wed 2/10 0	Sun 2/7 0	Sat 2/6 1	Fri 2/5 1	
P-Sausage Links*	1.00-TRAY	2	9.8	-9.8		10.0		Thu 2/11 11	Wed 2/10 0	Sun 2/7 0	Sat 2/6 0	Fri 2/5 0	
P-Slow Roast Chicken*	1.00-BATCH+1LB BAG 1.00-BATCH+1LB BAG	2	0.0	0.0		2.0		Thu 2/11 0	Wed 2/10 0	Sun 2/7 0	Sat 2/6 0	Fri 2/5 2	
P-Brioche Bread*	1.00-BATCH+1LOAF 1.00-BATCH+1LOAF	3	26.0	-26.0		20.0		Thu 2/11 0	Wed 2/10 0	Sun 2/7 0	Sat 2/6 28	Fri 2/5 31	
P-Portabella Mushrooms*	1.00-BATCH+1LB 1.00-BATCH+1LB	3	13.7	-13.7		10.0		Thu 2/11 15	Wed 2/10 10	Sun 2/7 13	Sat 2/6 15	Fri 2/5 15	

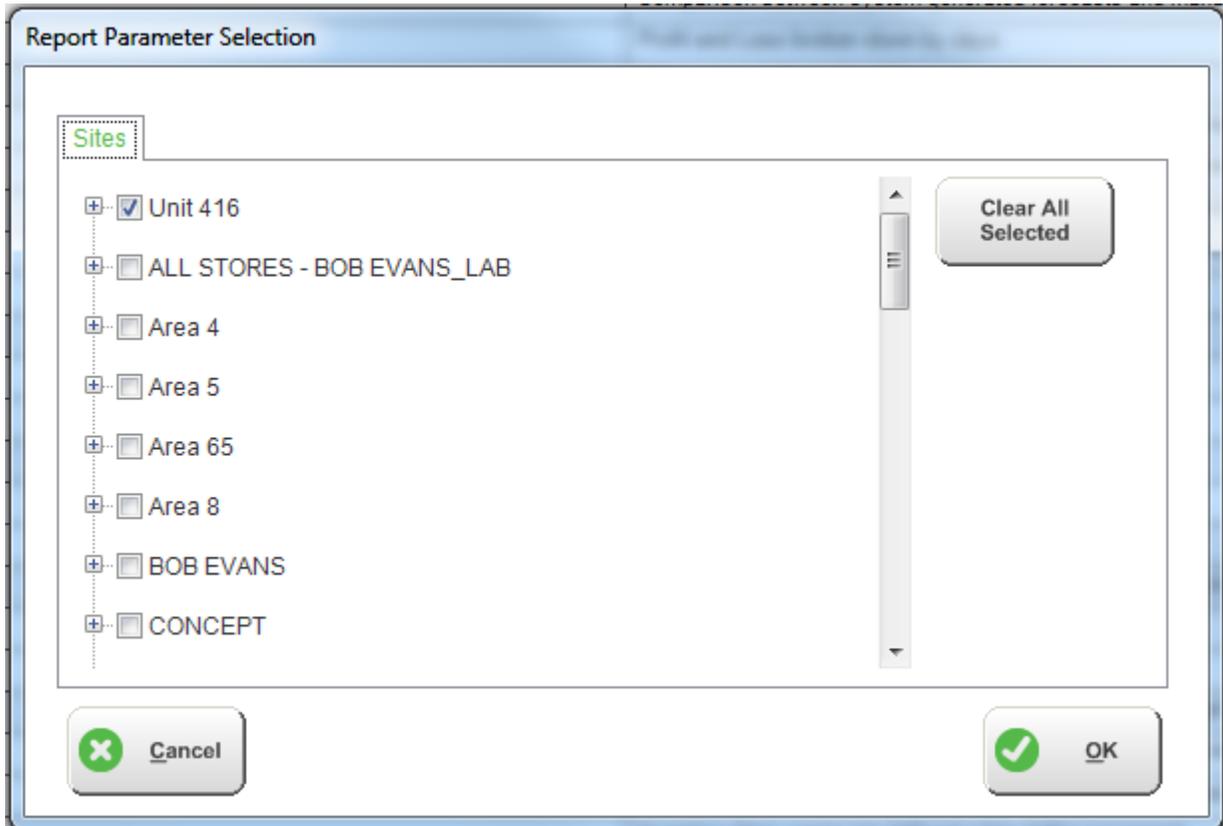
12. A print question pops up, click yes to print the list.



Execute Prep list Intervals:

NOTE: The Opening workflow incorporates the Interval Prep process by taking the manager directly to Interval pre step c.

1. Click Reports from the main NBO page.
2. Click to Open report 3.15 Prep list Intervals by prep station.
3. Click ok.



4. Print 3.15 Prep List Intervals by Prep station



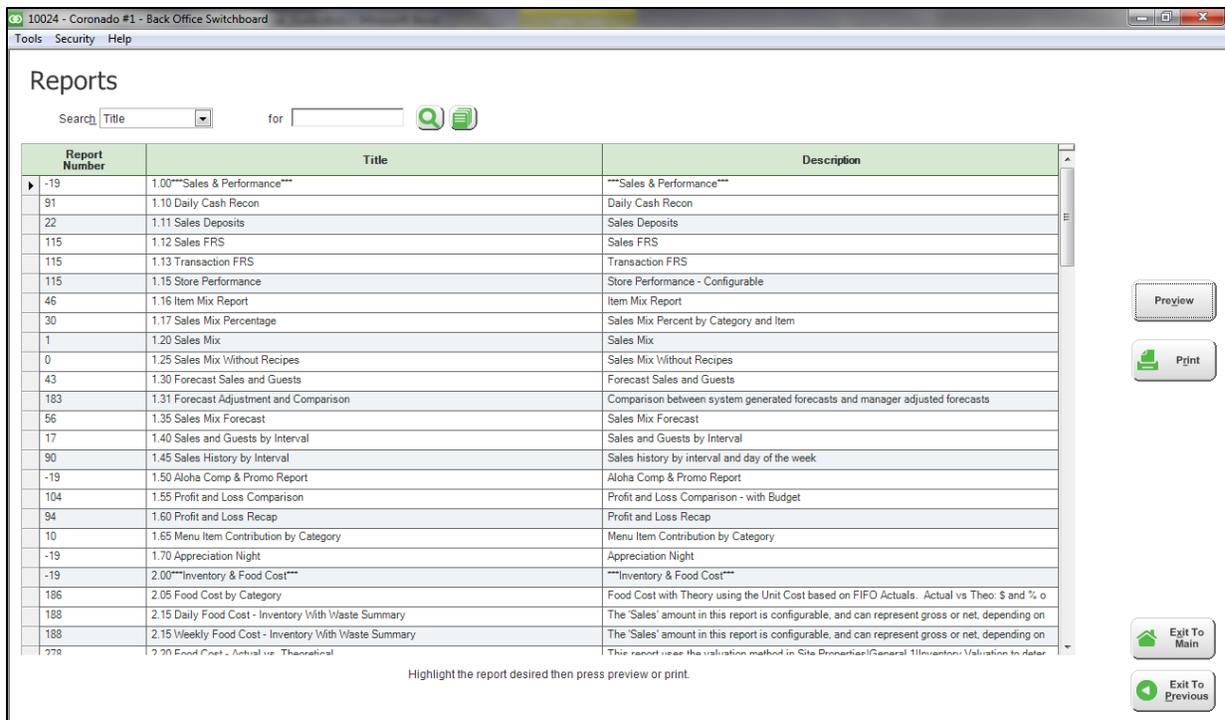
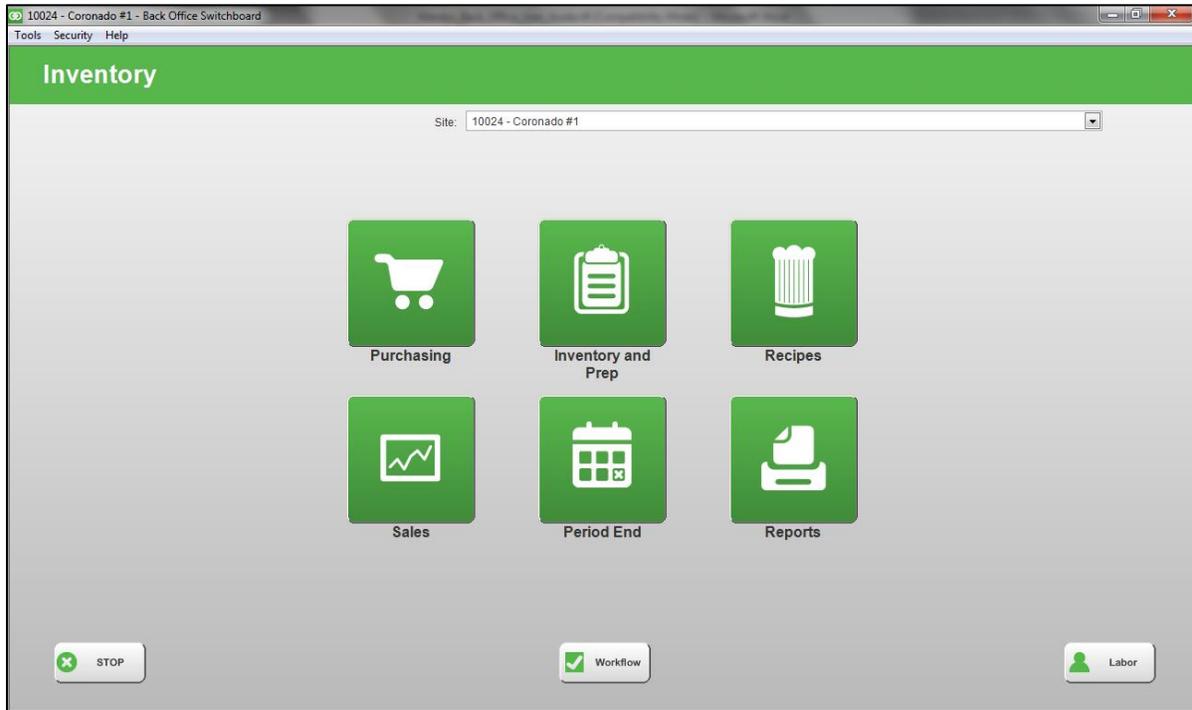
Day Parts: Breakfast, Lunch, Dinner

Broaster Prep

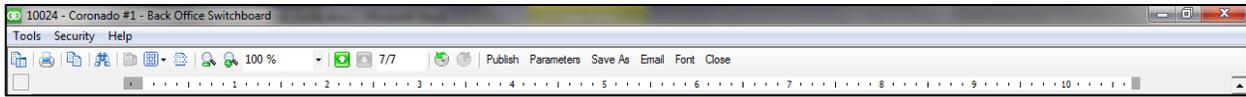
Prep Item	UnitDesc	Prep Start Time																								
		6:00A	7:00A	8:00A	9:00A	10:00A	11:00A	12:00P	1:00P	2:00P	3:00P	4:00P	5:00P	6:00P	7:00P	8:00P	9:00P	10:00P	11:00P	12:00A	1:00A	2:00A	3:00A	4:00A	5:00A	
P-Broaster Chicken	BATCH=8PIECES											1.00	2.00	2.50	1.50	0.50										
P-Bean Soup	BATCH=1.5GAL					0.50					0.50				0.50											
P-Beef Gravy	BATCH=1/6PAN					0.50					1.00				0.50											
P-Border Scramble Mix	BATCH	0.50			0.50					0.50					0.50											
P-Bread & Celery Dressing	BATCH=1BAG					0.50					0.50				0.50											
P-Chicken & Noodles	BATCH=2GAL					0.50					1.75				0.50											
P-Green Beans	BATCH=1GAL					0.50					2.50				0.50											

Viewing and Printing Reports

1. From the Desktop, log in to NBO.
2. From each main Switchboards (Inventory & Labor) click **Reports**. The Reports screen appears.



3. Select the appropriate Report and click **Preview** or click **Print**.
NOTE: Any report can be printed after previewing, so it is recommended you view the report first. Some reports are 100+ pages.
4. After previewing a report, you can choose to print All or selected pages.



5. Choose the radio button that corresponds to the desired time frame.

6. For certain selections, more information regarding the time frame is entered to the right.

Time Frame	Settings
Day	Select Date
Date Range	Select beginning and ending dates
Week	Choose reporting period, week #, and year
Period	Choose reporting period and year

7. Each report can have different date selections available depending on the type of report. When you are finished viewing a report, click the **Close** button

Running a Workflow in NBO

Each day you will have to perform a series of Workflows in order to import all POS Sales and Labor Data into NBO, as well as perform all Manager Duties (adding Safe Count, entering the Bank deposit and making sure that all employees are properly clocked out).

NOTE: If any report does not show data for a specific date, an import will fix this issue.

1. From the Desktop, log in to NBO.
2. From the main Inventory Switchboard click Workflow.
3. The Workflow screen appears with several different options.

Name	Description	Number
1. Opening Shift	Opening Shift	1000716
2. Mid-Day	Mid-Day	1000717
3. PM Manager	PM Manager	1000718
4. End of Day	End of Day	1000719
5. End of Week	End of Week	1000720
6. Scheduling	Scheduling	1000721
7. Purchasing	Purchasing	1000722
91. Current Day Import	Current day import from Aloha	1005220

4. Select the appropriate Workflow and follow the prompts.
 - Opening Shift – Will be used at open and this will walk you through opening tasks along with helping ensure you are setup for shift success. Areas covered are opening cash, overtime review, prep list, sales forecast verification, staffing verification, scheduling/labor plan verification and shiftly to-do list.
 - Mid-day – will be used by opening manager to finish their daily tasks. This will help ensure tasks for the shift are verified and completed. Areas covered are cash reconciliation including deposits, payroll verification, waste, and tomorrows planning.
 - PM Shift– Will be used by closing manager at the start of their shift and this will help ensure you are setup for shift success. Areas covered are prep list, sales forecast verification, staffing verification, scheduling/labor plan verification, shiftly to-do list and tomorrows planning.
 - End of Day (EOD) will be used by closing manager after close. This will help ensure tasks for the shift are verified and completed. Areas covered are cash reconciliation including deposits, payroll verification, waste, and verification of daily cycle counts and daily prep counts.
 - End of Week – will be used on Wednesday after food inventory by GM or person responsible for closing out the week. This will help ensure that food inventory and payroll for current week are completed. Areas covered are verification of food inventory, payroll and next weeks forecasted sales.
 - Purchasing – will be used for GFS purchasing and will help ensure that all steps for proper ordering are completed. Areas covered are GFS electronic order process.
 - Scheduling – will be used for forecasting and scheduling two weeks out. This will help ensure that all steps to proper forecasting and scheduling are completed for future success. Areas covered are sales forecasting and scheduling that meets staffing guidelines.

NOTE: If you haven't completed all tasks, the workflow will prompt you to go back to the POS terminal to perform those functions. You will have to restart the Workflow after you're done.

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Trouble Shooting Food Costs

In order to troubleshoot food cost it is important to know the following:

- Where do the numbers come from and what can affect them?
 - What is the basic food cost calculation?
 - What is the difference between Actual and Theoretical Food Cost?
 - What causes variances between Actual and Theoretical Food Cost?
 - What reports should I use to get the information necessary to troubleshoot food cost?
 - Where do the numbers come from and what can affect them?
 - Beginning and ending inventory – these are the physical counts performed by the manager
 - Differences in counting methodology
 - What time is inventory counted? One day it's counted in the morning and the following Week it's counted at night?
 - How are containers counted? Does everyone use the same information? For example: the stainless steel container that the products are stored in. How much do you deduct when you weigh the container filled with product?
 - What items are counted and what are considered used? For example – do you count the oil in the fryer?
 - Are the items actually being weighed or are they estimated?
 - How are partial containers counted? .1, .2, .3 or are they weighed
 - Purchases – come from Invoices, Paid in/out, and Inventory transfers
 - Mistakes entering invoices - Do the units match the prices? Were all items entered?
 - Missing invoices or transfers
 - Prices – Invoices
 - Mistakes entering invoices – Do the units match the prices?
 - What is the basic food cost calculation?
 - Actual Food Cost = Beginning inventory + Purchases – Ending Inventory
 - Theoretical Food Cost = Sales mix compared to the recipes in MenuLink
- Note: These values can be in units or dollars.**
- What is the difference between Actual and Theoretical Food Cost?
 - Actual food cost is what was used by the restaurant
 - Theoretical food cost is what should have been used based on what was sold by the store
 - What causes variances between Actual and Theoretical Food Cost?
 - Inventory counting issues/differences
 - Mistakes on invoices
 - Over/under portioning
 - Waste
 - Theft

What Reports should I use to get the information necessary to troubleshoot Food Costs?

- Top 20 Report- This report quickly identifies the top 20 items that are overused and the top 10 under used items start by looking at these.
- Food Cost Inventory Summary for the same time frame. This will give you all of the necessary information to troubleshoot the variance. Using the actual food cost calculation verify the information is correct.
- Are the beginning and ending inventory columns correct? You cannot fix the beginning inventory number but you can fix the ending inventory if it is incorrect. Look up the existing inventory, make the correction and re-post the inventory.
- Is the purchases column correct? If not, find the invoice that is incorrect or missing and correct it.
- Look up the item on the Purchasing History screen. Were there any purchases for the week? Do they look correct? You can see the invoice numbers if you need to correct an invoice.
- Are there any negative actual usage numbers? If so, look at the beginning inventory, purchases and ending inventory. You may see that the ending inventory is larger than the beginning inventory and there are no purchases. If so, it usually means that an invoice is missing. Or, it could mean that the ending inventory value is incorrect.
- Any changes you have made to the purchases or ending inventory will be reflected if you re-run your reports.
- If you still can't find the problem, recount the inventory of the product to verify what is in stock. Continue to re-run the Top 20 Item Usage Report and the Food Cost Inventory Summary to research variances until you are satisfied that the reported variances are accurate.
- How to troubleshoot theoretical cost.
- Is there sales mix for each day in the time period?
- If not reimport the sales for the missing day.
- Are there any items in the POS added category?
- If so contact your system administrator to have a recipe added for the new items.
- If sales mix does not reveal any discrepancies, go to the Recipes screen & then click on **Where Used** and make sure that the raw material is in the recipes you expect in the correct quantities.
- Contact your system administrator if you find missing ingredients