CULVER

Franchising System Inc.

BlueCube Version 6.2 Training Manual

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Table of Contents

Learning the User Interface

The following section will go over the basics of the BlueCube version 6.2 back office interface.

Taskbar

The Taskbar is the blue bar that resides at the top of the BlueCube back office.*(Figure 1.1)* The taskbar allows for easy access to many of the features of the back office. The taskbar is especially useful when using the back office in full screen mode. The following section provides an overview of the taskbar.

FIGURE 1.1
Common Tasks Toolbar

1. **Favorites**: Allows for the quick viewing of menu items that the user has selected as a "Favorite". Adding items to the **Favorites** button can be achieved by clicking on the **Organize Favorites** button from the **Favorites** button.
2. **Menu:** Allows for the viewing of the current users menu. This button is especially useful when using the back office in Full Screen mode.

📁   To set the back office to Full Screen mode click on the series of less than symbols **<** *(Figure 1.2)* that are located next ot the menu.

FIGURE 1.2
Switching the back office to Full Screen Mode

3. **Open Tasks:** Displays all of the current open tasks. This button can be used to toggle between several open tasks. This button is especially useful when using the back office in Full Screen mode.
4. **Workflow Tasks:** Displays the number of Workflow Tasks that have not yet been completed. A number will appear after the user opens the workflow they would like to complete.
5. **Search Box:** Allows for search while you type functionality. For example, if a user were to type Employee, all meny items with the word employee would appear as possible selections. *(Figure 1.3)*

Side Menu

Each User Role has its own specefic Side Menu. *(Figure 1.4)* This Side Menu contains all of the menu items that the specific user roll is allowed to accomplish. Each Menu folder can contain single menu items or other subfolders that correspond to the main folder task. There will be no more than 1 subfolder per main menu item in order to provide quick access to tasks.

Owner Side Menu   **Shift Manager Side Menu**   **Team Member Side Menu**

Daily Management Duties

*The following section will cover the steps and procedures needed to manage a business day with
the 6.2 back office environment.*

Closing Management POS Functions

Sign out and close shifts
    Can be done one of two ways.

1. Go to any terminal that has a **Store Management** button at the bottom of the POS screen and touch that button.
2. Swipe your manager card or enter your MSR number.
3. Touch the **Site Operations** button.
4. Touch the **Shift Operations** button on the left side of the screen.
5. Sign out and then Close each shift, touch the shift to highlight it.
6. Touch the **Close Shift** or **Force Sign Out** button at the bottom of the screen, repeat for each shift. The **Force Sign Out** button is visible if you press the right pointing arrow at the bottom of the screen.
7. Touch the **Home** button.
8. Touch the **Site Reports** button.
9. Choose **Financial Reports** from the list on the left of the screen.
10. Select the current date and choose either All or choose to do each shift separately.
11. Place tape(s) into cash drawer(s) and close the Store Management Application.
12. Remove cash drawers and take to office.

OR

1. Touch the **Mgr. Funct.** button on the right side of the POS screen
2. Touch the **Close Shift** button on the bottom left of the screen.
3. Swipe your manager card or enter your MSR number.
4. A Shift Financial Report will print automatically, place this into the cash drawer.
5. Repeat steps 1-3 at each register
6. Remove cash drawers and take to office.

Check clocked in report to make sure all employees have clocked out.
1. From the Store Management application, touch **Site Reports**.
2. Touch the **Clocked In Report** button.

Reconcile cash and enter deposit
   There are two options
   If settling cash on the POS, go to the next section: Cash Settlement Option 1 – POS.

OR

If settling cash in the back office, Run Daily Process on POS, then continue to Back Office Morning Management Functions below.

Cash Settlement Option 1 – POS

1. Count drawers back down to beginning amount; keep each drawer's deposit totals separate.
2. Record Final Pickup information for each drawer (shift) and return to the POS with your numbers.
3. Sign into Store Management.
4. Touch **Site Operations**, then **Shift Operations** on the left side of the screen.
5. Review Drawer Events.
   a. Highlight a shift by touching it and select the **Drawer Event** button from the bottom menu.
   b. Check that all **Loans**, **Paid-Ins, Paid-Outs**, and **Pickups** are entered correctly for each shift.

📁 After the Shift is Settled you can not Add or Edit loans, Paid-Ins etc… at the POS

6. Final Pick Up / Settle.
    a. From the Shift Operations screen in Store Management, highlight a shift by touching it.
    b. Touch the **Final Pick Up/Settle** button at the bottom menu.
    c. Confirm that each tender amount matches amount counted in drawer. If changes are necessary, *(Figure 1.5)*

FIGURE 1.5
Entering a Pickup at the POS

- Highlight any entry to be edited by touching it.
- Key in the correct amount, touch **Enter**, touch **Save** when all entries are correct.
- Repeat for all shifts.

FIGURE 1.6
Shift showing as settled on the POS

- Make sure to validate that all shifts are marked as **Settled** *(Figure 1.6)*

7. Safe Operations at the POS (can be completed in back office if desired).
    a. From the Shift Operations screen in Store Management.
    b. Choose **Safe Operations** from the menu on the left of screen.
    c. Touch **Add Deposit** button in the bottom menu. *(Figure 1.7)*

FIGURE 1.7
**Adding a deposit
on the POS**

EVENT	TRAN NUM	BUS DATE	BAG	AMOUNT	TIME
DEPOSIT	257	11/10/05	999	$0.00	11/10/05 2:05 PM
DEPOSIT	258	11/10/05	999	$2,246.41	11/10/05 2:10 PM

Add Deposit   Edit Deposit

1. From the next screen, choose **Edit Bag #**, key in your bag #, press save.
2. Choose tender type (cash, check) and key in the $ amount, touch **Save.**

To Edit a Deposit at the P.O.S. (from the Safe Operations screen)
   o Touch the **Deposit** to be edited.
   o Touch the **Edit Deposit** button.
   o Touch the tender type (cash, check) and key in correct amount.
   o Touch **Enter**, touch **Save**; receipt will print.

8. Run the Daily Process.
9. Complete back office morning management functions as listed below.

Cash Settlement Option 2 - Back Office

1. Clock In at POS. Verify Daily Process has been completed.
2. Count drawers down to beginning amount, keep each drawer's total separate.
3. Complete the back office morning management functions outlined below

Back Office Morning Management Functions.

1. Log in to the Blue Cube Enterprise site (**https://qsr.radiantenterprise.com**).

Information Center
Daily Tasks
Workflow Calendar
Saved Reports
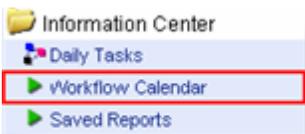
2. Click the **Information Center** system folder, click the **Workflow Calendar** task.
3. Click on the day that needs to be ended-typically the previous day.
4. If the day has not been Started; click **Start of Day**, **Manager Open Day, Post, Close**.
5. Click the **End of Day** link.
6. Click **Browse Repair Unprocessed Punches.** See Daily Time Keep section for details.
7. Click **Browse Review Unpaired Punches.** See Daily Time Keep section for details.
8. If you are currently utilizing the Supply Chain features of the BlueCube back office, add any adjustments, counts, or receivings that you may have for the day by click on the appropraite tasks.

✗ **Supply Chain events cannot be entered for a previously closed day in the back office. All entries must be made for the current open business day in the back office.**

9. Click the **Shift Review** link. This will navigate to the **Manage Shifts** screen.

➔ *If you complete your cash settlement on the POS as in option 1 above skip to step f below, as all shifts will show as being settled.*

     a. Check that all shifts are closed. Click on a shift to highlight it.
     b. Click **Drawer Events** to review and edit Loans, Paid-ins and Paid-outs for each shift.
     c. Click the **Settle Shift** button in the bottom menu for a selected shift.
     d. Confirm that each tender type amount matches the drawer counts, editing as necessary.
     e. Verify the information is correct and click **Save & Reconcile** button.
     f. .Verify that all information is correct on the reconcillation screen and click on **Save & Close** to continue.
     g. When all shifts are Settled and/or Reconciled click **Save as Complete** at the top of the page.
10. Click on the **EOD Safe Reconciliation** link
     a. Enter **Ending Change Fund,** this amount should equal the **Starting Change Fund** amount.

🗁 Your Ending Change Fund amount will be your next days' Starting Change Fund amount.

     b. Add deposit
         i. Click **Add Deposit**.
         ii. Enter **Bag Number.**
         iii. Confirm Check and Cash totals, making any corrections as necessary.
         iv. Click **Save and Close**.
     c. On the Safe Count page, click **Save as Complete**.
     d. Click on **Daily Reconciliation**. Confirm Totals and click **Save as Complete.**
10. Click **Post**

    a. Click **OK** to perform.
    b. On the Background Job Status screen click the **Refresh** button several times until all jobs are completed. Click **Close**.
11. In **Workflow Calendar** click on current day to open day.
    a. Click **Start of Day-Culvers**.
    b. Click **Manager Open Day**.
    c. Click **Post**, Click **OK**. then click **Close**.

Midday Management Functions

1 Sign out and Close 1st Shifts/Sign in 2nd Shifts for Current Day (At Register)
2 Replace 1st Shift Drawers with 2nd Shift Drawers (At Register)
3 **Record Loans** for 2nd shift tills (refer to Management Functions)

→   *If you complete cash settlement on the POS, complete Cash Settlement Option 1 – POS (Follow steps 1-6)*

4 **Settle 1st Shifts** for Current Day in the back office
    a Log into the Blue Cube Enterprise site (**https://qsr.radiantenterprise.com**).
    b Click the **Information Center** system folder.
    c Click the **Workflow Calendar** system folder. Click the current day.
    d Click **Midday Workflow.**

✎   **IMPORTANT! If not on current business day proceed to the End of Day Workflow!**

    e Click **Midday Shift Review**.
    f Settle closed shifts as in EOD. Click **Close** when drawers are reconciled.

🗁   Note: You will not be able to save as completed.

    g Open **Midday Safe Reconciliation** and complete as in EOD.

Troubleshooting Cash Settlement

🗁   Shifts DO NOT have to be Reconciled before clicking Save as Complete in the Shift review. This will allow for the ability to Edit Final Pickups from the Safe if the shift review is completed without reconciling shifts. Once a shift is reconciled, it cannot be edited without contacting RDS or the CfSi.

✎   **If you should ever have a scenario where you are unsure of what to do, please contact RDS or CfSi. Once a day has been posted it cannot be edited.**

Paid Ins, Paid Outs, Loans cannot be added to or edited for a shift once it has been Settled or Reconciled without contacting RDS or CfSi.

Scenario:

You have closed the shift on the POS, and are preparing to count the drawers in the office. You login to Blue Cube Enterprise, and navigate to the Manage Shifts application, and notice there is no data in any of the fields.

Solution:

The shift information has not been exported from the POS to the Blue Cube Enterprise site. You can manually force the export, so that you can see your shift information in Blue Cube.

1   Touch the **Store Management** button at the bottom of the POS screen

2   Swipe your manager card, or enter your MSR number.
3   Touch the **Site Operations** button
   a   Touch the **Host Contact** button *(Figure 1.8)*
   b   Touch the **Initiate All Exports** button
   c   A popup box will appear alerting you that exports have been sent

FIGURE 1.8
Store Management screen showing the buttons to push to export the data to Enterprise

4   After the data export click the **Refresh** button in the **Manage Shifts** application to see if you data has been uploaded.

It may take up to 30 minutes for the data to reach Blue Cube Enterprise. If after this 30 minute period you still do not have any information in the **Manage Shifts** application please contact RDS or CfSi.

POS Management Functions

The following section will cover the managerial and specialty functions that can be preformed on the POS

POS Sign In

The first action that must be completed to use the POS is signing in. When singing in a register you are actually signing in an employee. CfSi has created several employees solely for this purpose. These employees are available at each restaurant. The following table will further explain the employees that are available to use at each restaurant. It is recommended that you choose to use one group of either 1,2, etc.; 501, 502, etc.; or 701,702, etc. and call CfSi or RDS to disable the other employees. If you see an employee name listed below in your employee list that you do not use, please call to have it disabled at your restaurant. This will prevent employees from using the other sign in numbers to override POS security.

Sign In #	Employee Name	Description
1 2 Etc.	zReg, One zReg, Two	Normal security on all POS functions
501 502 Etc.	zReg, One CC zReg, Two CC	Prompts for manager override when selling Culver Cards
701 702 Etc.	zReg, One GC zReg, Two GC	Prompts for manager override when redeeming Gift Certificates
111 112 Etc.	zyTraining One zyTraining Two	Places the POS in training mode – Orders are able to be tendered but not include in sales, and transactional data

Store Management Application

🗁   Performing these functions may require a manager PIN or swipe card.

Accessing the Store Management Application
1. Touch the **Menu** button in the lower corner until you see **Store Mgmt**
2. Touch the **Store Mgmt** button. Enter your PIN (MSR#) or swipe your card

Closing a Shift
1. Access Store Management, Site Operations
2. Touch **Shift Operations**

3. Touch the name of the employee (Register)
4. Touch **Close Shift**

<div align="center">**OR**</div>

1. Touch the **Mgr Funct**
2. From the Manager Function screen press the **Close Shift** button

Running the Daily Process
1. Access Store Management, choose **Site Operations;** touch the **Shift Operations** button
2. Verify that the end date and start date are correct. Touch the **Perform** button.
3. Touch **Yes**. Double-check that the new dates are correct.

Entering a Loan, Pickup, Paid In, or Paid Out
1. Access Store Management, choose **Site Operations;** touch the **Shift Operations** button.
2. Highlight a shift by touching it, touch **Drawer Events** in the bottom menu.
3. Touch **Add Loan** etc… in bottom menu, touch tender type, key in amount, touch **Enter**, touch **Save**. (Figure 2.2)

Editing a Loan, Pickup, Paid In, or Paid Out

📁   Credit Cards and Gift Cards cannot be edited

1. Access **Store Management** functions, choose **Site Operations;** touch the **Shift Operations** button.
2. Highlight a shift by touching it, from the menu at the bottom, touch the arrow button next to the Close button to navigate within the menu options, and select **Edit Drawer Events**. (Figure 2.2)
3. Touch the drawer event to navigate to the **Edit Screen**, key in the corrected amount.
4. Touch **Save**, the adjusted amount will then display; touch **Close**.

FIGURE 2.2
**Entering
Pickups, Loans,
Paid Ins, etc
from the POS
with the drawer
actions
highlighted**

Employee:	zReg, Two		Business Date:	11/8/05
Shift #:	1		Over/(Short):	$0.00
Drawer #:	1		Shift Status:	Closed

Event	Tran#	Initial Tran	Amount	Adjusted Amount
Pick Up	192	11/8/05 11:34 AM	$512.51	
Pick Up	201	11/8/05 11:34 AM	$512.51	$0.00

◄   Add Loan   Add Pickup   Add Paid-In   Add Paid-Out   ►

Currently on the Clock Report
1. Access **Store Management** on POS. Touch the **Site Reports** button.
2. Touch the **Currently on Clock** button.

✎   **The Currently on the Clock Report will show all employees who currently have
unpaired punches (a clock in with no clock out). Employees who may have been
edited in the back office will still show in this report.**

Check Labor on POS
1. Access **Store Management** on POS. Touch the **Site Reports** button.
2. Touch **Labor Percent of Sales**.
3. Select a business date and a time interval.

📁   The labor cost is calculated as the sum of an employee's clocked in job pay rate times
the number of hours worked in that time period. **Labor cost at the POS does not
allow for overtime, meals or breaks.**

Add Time Punch

If you are adding a Clock-In

1. Access **Store Management** functions, choose **Site Operations;** touch the **Edit Timecard** button.
2. Touch the **Add Clock-In** button, and then select the appropriate employee from the list.
3. Select the appropriate Job if the Job selection box appears.
4. Touch the Date or Time box to select which you would like to change, and touch enter when complete

✗   **You may only add time punches on the POS for the same day.**

If you are adding a time punch to an employee who is already clocked in
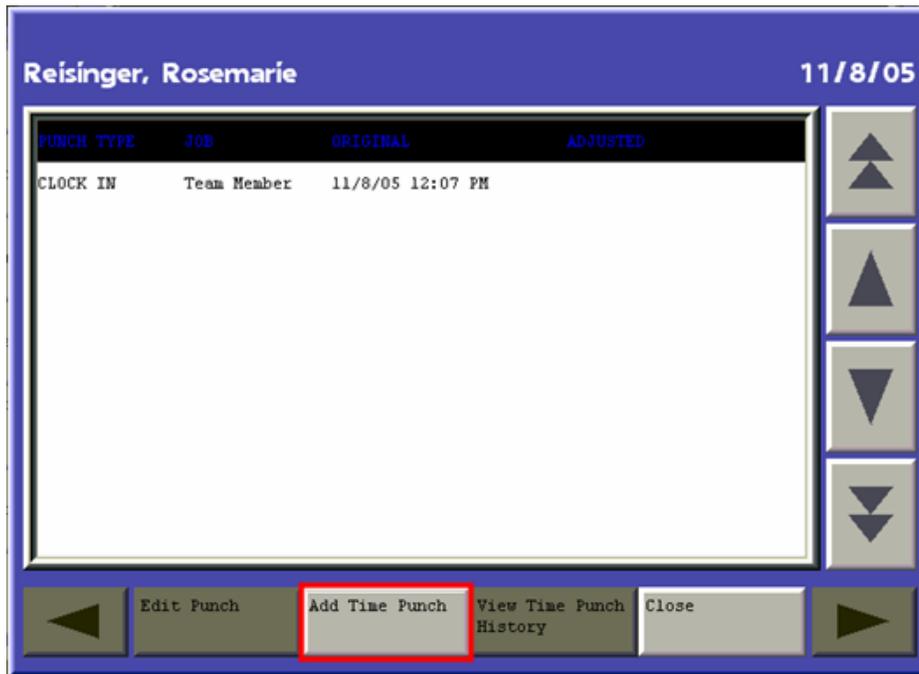
1. Access **Store Management** functions, choose **Site Operations;** touch the **Edit Timecard** button.
2. Touch the appropriate employee, and the touch the **View Details** button.

FIGURE 2.3
The employee add time punch screen

3. Touch the **Add Time Punch** button, (Figure 2.3) and then select the type of punch (Clock Out, On Break, Meal Started), and edit the time as appropriate.

Edit Time Punch on POS (if available)

📁 *RDS/CfSi* will need to turn this on before you can use this feature.
With this configuration, all time punches are sent to enterprise only after the end of day is run on the register. Current business day figures will not appear in back office labor reports. **Time punch edits cannot be made in enterprise.**

1. Access Store Management; choose **Site Operations**
2. Touch **Time Punch Processing**.
3. Touch the persons name, touch **View Details**.
4. Touch the **Adjust Time Punch** button.
5. Touch the Date or Time box to select which you'd like to change, then touch **Backsp** and enter the desired value.
6. Touch **Enter**.
7. Touch **Close** to return to the Store Management Application.

Manager Functions

📁 The following three refund items all require a manager pin number or swipe.

Refunding Items
1. Touch **Mgr. Funct;**.then touch **Refund Item**.
2. Enter all items from the transaction exactly as they appear on the original receipt.
3. Touch the **Tender** button. Touch the **Exact Cash** button.

✏ **A receipt will not print automatically when refunding by item**

Refunding Dollar Amounts
1. Touch the **Mgr. Funct**. button. Touch the **Refund Item** button.
2. Ring up a **Misc Item** from the Special Inst. page.
3. Touch the **Mgr. Funct** button. Touch the **Price Override** button.
4. Enter the refund amount, touch **Ente**r. Touch the **Tender** button. Touch the **Exact Cash** button.

Refunding by Transaction Number
1. Touch the **Mgr. Funct**. button.
2. Touch the **Refund by Trans Number** button.
3. Enter the full transaction number from the receipt, touch **Enter**.
4. A refund receipt will print.

📁 *Hint:* Transaction numbers are in numerical order. The first 2-3 digits will be the same for most of the orders in a business day, so if you know these digits along with the last three numbers from the register or monitor, you can determine the entire transaction number.

Printing a Receipt Using Scroll Previous Transaction Button
1. Touch the **Mgr. Funct**. button. Touch the **Scroll Previous Trans**. Or **Scroll Previous Trans Local** button.
2. Touch the **Print Receipt** button. Touch the **Done** button.

📂   **Scroll Previous Trans** allows you to seqentially view transactions from all registers, **Scroll Previous Trans Local** allows you to view transactions from the register that you are currently on.

Printing a Receipt Using Transaction Number
1. Touch the **Quantity** button on the main screen.
2. Key in the **Full Transaction Number**.
3. Touch the **Print Receipt** button.

Price Override
1. In the Active Receipt, touch the item to be overridden.
2. Touch the **Mgr. Funct**. button. Touch the **Price Override** button.
3. Enter the amount of the override, touch **Enter**. Swipe manager card. Tender the order. (Figure 2.4)

FIGURE 2.4
Price Override with the item selected in the active receipt

Reading an MSR Card (Magnetic Stripe Read)
1. Touch the **Mgr. Funct**. button. Touch the **MSR Read** button.
2. Swipe your manager card for MGR override, swipe the new card.
3. Record the PIN (MSR) number. Touch Go Back.

No Tax
1. Enter the order. Touch the **Mgr. Funct**. button. Touch the **No Tax** button.
2. Enter the customer's tax-exempt ID number (optional), touch **Enter**.

No Sale

🗁   Use to open the till without a drawer key.

1. Touch **Mgr. Funct**. Touch the **No Sale** button. Swipe **Mgr Card**.

KPS Activity Level

The KPS Activity level allows you to control what items appear on the kitchen displays. This function is useful when running the kitchen with varying amounts of employees. The table below will further explain each level, and an example of when the levels could be used.

KPS Activity Level	Item Routing	When to use
Low Level	Items that are routed to the **grill** and **fryer** screens are routed to the **bun** screen	One-man kitchen setup. All displaying items can be controlled from one location.
Normal Level	**Fryer** items are routed to both **fryer**, and bun **screen**	Typical business volume. Fryer items routed to both displays for redundancy.
Busy Level	All items are routed singly to their respective screens	Expected high business volume. Displays will show only show items directly related to the screen to reduce clutter.

The current KPS Activity Level can be viewed by checking the top portion of any of the kitchen displays. (Figure 2.5) To configure the current KPS activity level:

1. Touch the **Mgr. Function** button. Touch the desired activity level button

FIGURE 2.5
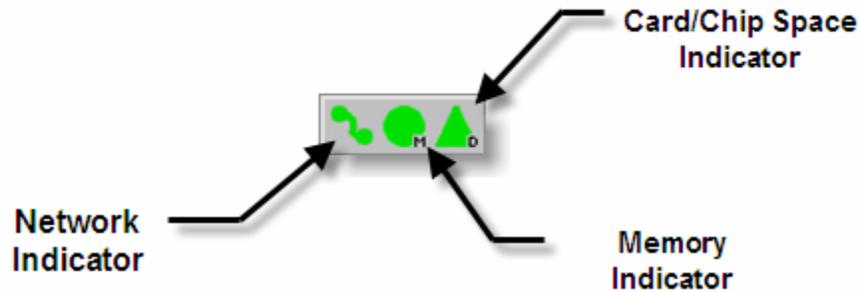**KPS Activity Level shown on kitchen display**
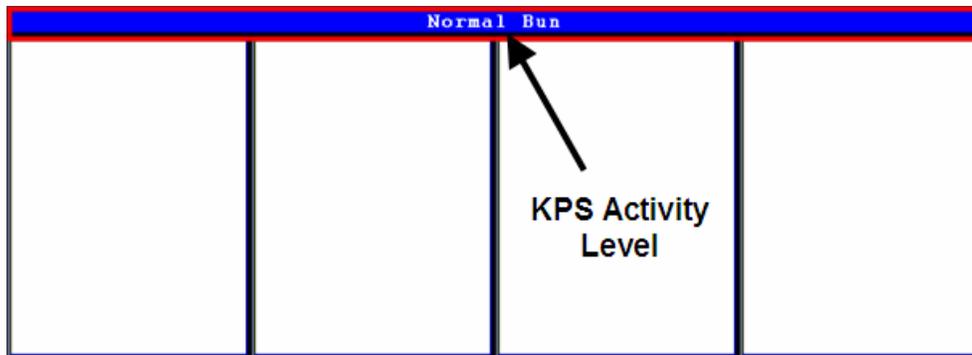
POS Status Symbols

It is import to understand the POS status symbols that are located in the lower right portion of the display. (Figure 2.6) These symbols can alert you to issues that you may have with your POS system.

FIGURE 2.6
**POS status
symbols**

The network indicator alerts you to whether the POS is currently able to communicate with the site controller. This information may be important when trying to troubleshoot credit issues.

Approving Downloads

Approve Download
1.   Click on the **POS Management** system folder. Click on the **Approve Download** task.
2.   Select appropriate download from the drop-down list. Select your store code by checking box.
     a.   **Full Download** – for coupons, discounts, new items
     b.   **Employee Download** – for new employees, wage or job changes
     c.   **Pricing and Item Locks Only** – for pricing changes and item lock changes
3.   Click **Download.**

Initiating Downloads
After approving the download in the Back Office you can have the updates applied to your site one of two ways.
1.   Do nothing, the download will be applied for the next business day on the Point of Sale.
2.   Initiate a download from the POS terminals
     a.   Access **Store Management** functions, choose **Site Operations,** and touch the **Host Contact** button and then the **Initiate Download** button. (Figure 2.7)
     b.   You should receive a screen telling you that a download has been requested.

FIGURE 2.7
**Initiate
Download
button from the
Radiant POS**
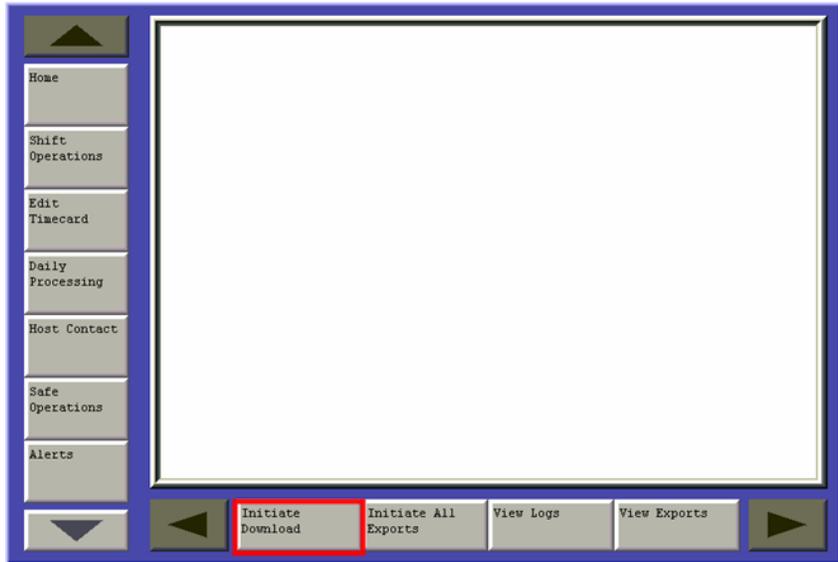
Update Notifications

Once updates are applied to your site via a download or through sending files, you will receive a notification bar on the POS alerting you to the new updates. They are as follows:

Rebooting the POS Terminals

You may need to reboot the POS or the KPS devices (kitchen and front displays) after you receive a full download, or to correct performance issues that you may be experiencing. The following is how to initiate this process.

1. Access **Store Management** functions, and then scroll to your right using the arrow key. Touch the **Utilities** button
2. You should be brought to the Terminal Management screen, if not press the **Terminal Management** button. (Figure 2.8)

FIGURE 2.8
**Terminal
Management
Screen from the
Radiant POS**
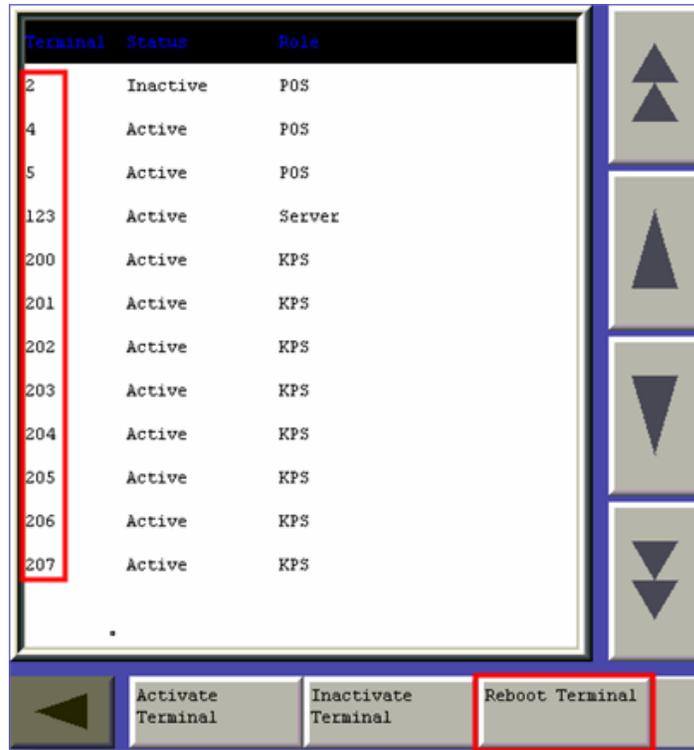
3. From this screen, touch the terminal number of the POS or KPS (See chart below for corresponding terminal to name lookup) that you would like to reboot. Then press the **Reboot Terminal** button.

📁 Remember that when rebooting all terminals, to reboot the POS that you are currently using last.

Terminal ID (KPS)	Location
200	Grill
201	Fryer
202	Bun
203	Bun D/T
204	Shake
205	Park
206	Custard

Call-in Order Function

Call-in orders can be rung in using the following steps:
1. Press the **Other Funct** button, then press **Start deferred Order**.
2. A pop up window will appear telling you that the order is set as deferred, touch **Go Back**.
3. Touch **Go Back** and ring up the order..
4. Touch **Other Funct**, Press the **Store Deferred Order** button.
5. To enter the time to fire the order to the kitchen, click the left arrow button to clear the time and enter a new time. Press A for AM and P for PM. Please note that noon is 12:00 PM. (Figure 2.9)
6. To enter a customer number or name, touch the box below the time and use the keypad to enter the information. This is the name that will appear both on the kitchen display, and on the receipt.

FIGURE 2.9
Deferred Order (Call-In) order screen from the Radiant POS

7. Click **Done**.
8. A pop up window will appear telling you that the order has been stored.
9. When the order is sent to the kitchen monitors the words "Change Order" will appear on the header.
10. When the customer arrives, the order can be recalled from any terminal:
    a. Touch the **Other Funct** button
    b. Touch the **Recall Deferred Order** button
    c. Tender the transaction as usual

Tendering a Call-In at Drive Through

If a guest informs you that they have a Call-In order at the Drive Thru speaker, the process of ringing up the Call-In differs slightly. Go to the *Special Instructions* page on the POS. Press the **D/T Call-In Holder** button, and then store the order. Then when you recall the order on the Drive Thru money taker register, you can recall the Call-In order.

Workforce Management

The following section covers many of the tasks needed to effectively manage your restaurant's workforce.

Adding a New Employee

1. Log into the Radiant Enterprise site (https://qsr.radiantenterprise.com) under any of the following roles.
   - Owner
   - Restaurant Manager
   - Restaurant Manager w/o Salary View
   - Schedule Manager

📂 The Restaurant Manager w/o Salary View, and Schedule Manager roles are both able to add employees. However, they cannot set a wage for the employees.

2. Navigate to **Workforce Management** ➔ **Employee Setup** from here click on the **Add Employee** button at the bottom left.
3. Enter Employee information; required informational fields are highlighted in red, and are as follows.
   - **Name** Tab – Employees First Name and Last Name
   - **Address** Tab – Optional information about employees address and contact information
   - **Login** Tab – The password to use when accessing Blue Cube Enterprise, and Language settings
   - **Role** Tab – The login role that the employee will have when accessing Blue Cube enterprise
   - **Organization** Tab – The business unit that the employee is allowed to login at, this should default to your business unit
4. Click the **Related Links** (Figure 3.1 1) button at the top right of the page and select **Workforce Management Setup** (Figure 3.1 2) from the drop down menu. You will be prompted to save the employee information before proceeding.

FIGURE 3.1
**Add Employee
application**

Workforce Management Setup

General Tab (Figure 3.2)
1. **Home Site:** Will default to your restaurant. If you share employees with another Culver's, all hours worked at both sites will be on the Home Site payroll, and all pay related reports.

✎   **The Home Site cannot be changed for an employee once WFM setup is Saved as Complete**

2. **Birth Date:** Used to determine minor status by Blue Cube Enterprise..
3. **Hire Date:** Used to determine seniority when using workforce tools such as the scheduling application and employee review.
4. **EEOC Information:** Can be left blank, or must be legally filled out for all employees

FIGURE 3.2
**General Tab
in Workforce
Management
setup**

Contacts Tab (Figure 3.3)
All information located in the contacts tab is optional.

1. **Emergency Contact Information:** Emergency contact information for the employee
2. **Benefits Information:** Information about the person the employee has chosen for the possible distribution of benefits.

FIGURE 3.3
**Contacts Tab
in Workforce
Management
setup**

Scheduling Tab (Figure 3.4)
All information located in this tab is optional. Filling out this information however will make use of the scheduling application both much easier and useful.

1. Select whether the employee is available to work on the specific day.
2. Fill in the specific times that the employee can work.

All other specifics of the Scheduling Tab will be covered in detail in the Inventory and Scheduling with Radiant manual.

FIGURE 3.4
**Scheduling
Tab in
Workforce
Management**

Time and Attendance Tab (Figure 3.5)
1. **Allow Overrides at Timeclocks:** If selected the employee would be allowed to enter their password and override any manager prompts that appear while using time keep functions at the POS such as schedule validations. This should be left unchecked.
2. **Clock in Pin/Badge Number:** This should be the same as the employee's *POS Clock In Pin*. This will be used to view all of the employees *POS Clock In Pin* by running the *Employee List* report with the "Show Badge ID" checkbox checked.
3. **Can work unassigned jobs:** If selected the employee will be allowed to select a job at the time clock that is not either their primary or secondary job. (This should be left unchecked)

4. **Punch Validation:** (Figure 3.5 A) Works in conjunction with the scheduling application to compare the employee's punches to the schedule and restrict unauthorized punches. The following options are available
   - **No Schedule Validation –** Default Setting, choose if you are not scheduling on Blue Cube
   - **Validation with Self-Override** – Employees can override any exceptions that may occur outside the punch rule. This would be useful to assign to Management with Access All POS security permissions.
   - **Full Schedule Validation** – Checks against the schedule and allows punches as specified in the *Punch Rule*. Will require a Manager override for Clock in or Clock out outside of Punch Rule.
   - **Employee Does Not Punch** – Employee will not be allowed to time keep at the POS. (Owners or Salaried Management)
5. **Employee Generates Alerts/Exceptions:** Will show alerts (Inbox) or Exceptions (Reports) to any employees who generate manager overrides when punching. (Default is checked)

FIGURE 3.5
Time and Attendance Tab in Workforce Management setup

After filling in all of the information in the **Time And Attendance** tab click the continue button to continue onto the employees job information.

Jobs Tab (Figure 3.6)
1. **Dept:** Crew, Sub Manager or Manager, these choices define available jobs to choose from. Generally, the Dept of Crew and the Job of Team Member are used in Culver's for non-management employees.
2. **Job:** A Team Member, 1st Asst. General Manager etc… Choosing the Job of A Team Member and avoiding choosing Grill, Middle etc…for non management employees will make scheduling easier to manage as we move forward.
3. **Job Title:** This information is optional. Select a Job Title that may better define the employee than their job.
4. **Skill Level**, **Rank Level**, **Hours per week:** Leave blank at this time. These options will be used with Auto Scheduling which is under development at this time.
5. **Pay Class Code:** To choose this item think of the following three questions:
   - Is this employee full time or part time
   - Is this employee hourly or salaried
   - Is this employee exempt from overtime or not exempt from overtime

6. **Pay Policy:** Use regular; this will allow overtime pay, and specific holiday pay to be applied if/when appropriate.
7. **Punch Rule:** Determines the rule you would like to use with the employee when using full schedule validation. CfSi currently suggests using *Regular 2 – min.*
8. **Shift Strategy:** Will be used in Auto Scheduling. <u>Please leave at the default of none</u>.
9. **Initial Rate:** The starting wage you would like to give to the employee
10. **Reason:** This field is optional and can be left at none. The reason field can be useful for tracking an employees wage history
11. **Comment:** This field is optional and can be left blank. The reason field can also be useful for tracking an employees wage history.

FIGURE 3.6
Job screen in Workforce Management Setup

Assigning a Secondary Job
A secondary job can be assigned to an employee who has two pay rates. An example would be your Porter might work as a Team Member for extra hours at a different pay rate. The employee will be required to choose his/her job at the POS when they clock in.

1. To assign a secondary job click the Assign Secondary Job button (Figure 3.7 A).This when then take you to the Job Detail Screen
2. The Dept, Job, Job Title, Initial Rate, Reason and Initial Rate are set up the same as with a primary job. You have the ability to set an Optional End Date for a temporary job assignment. The Skill Level, Rank Level, and Hours per week should be left unfilled as with the primary job.

FIGURE 3.7
**Assigning a
Secondary
Job**
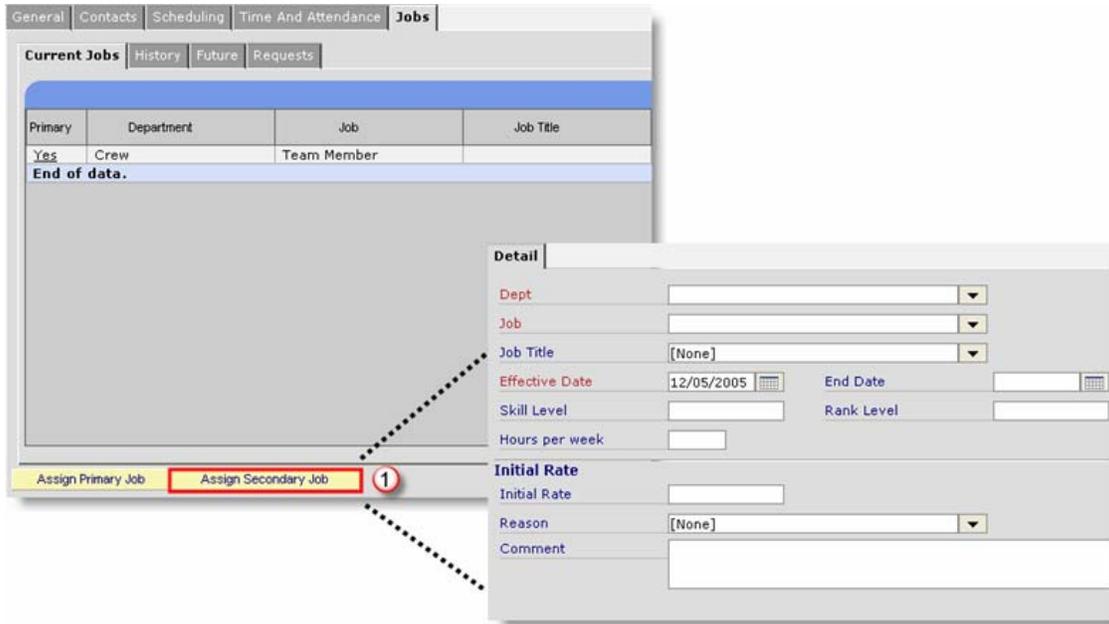
Pay Rate Adjustments

1. Select the *Jobs* tab under Workforce Management Setup. From here click on the **Yes** link. (Figure 3.8A)
2. From the *Edit Primary Job* screen click the **Job Rates** button. (Figure 3.8B)
3. From the *Edit Job Rates* screen, click the **Add Job Rate** button. (Figure 3.8C)
4. From the *Job Rate Change* screen enter the new wage, the effective date, and any comments that you may have about the rate change.

FIGURE 3.8
**Changing a
Pay Rate**
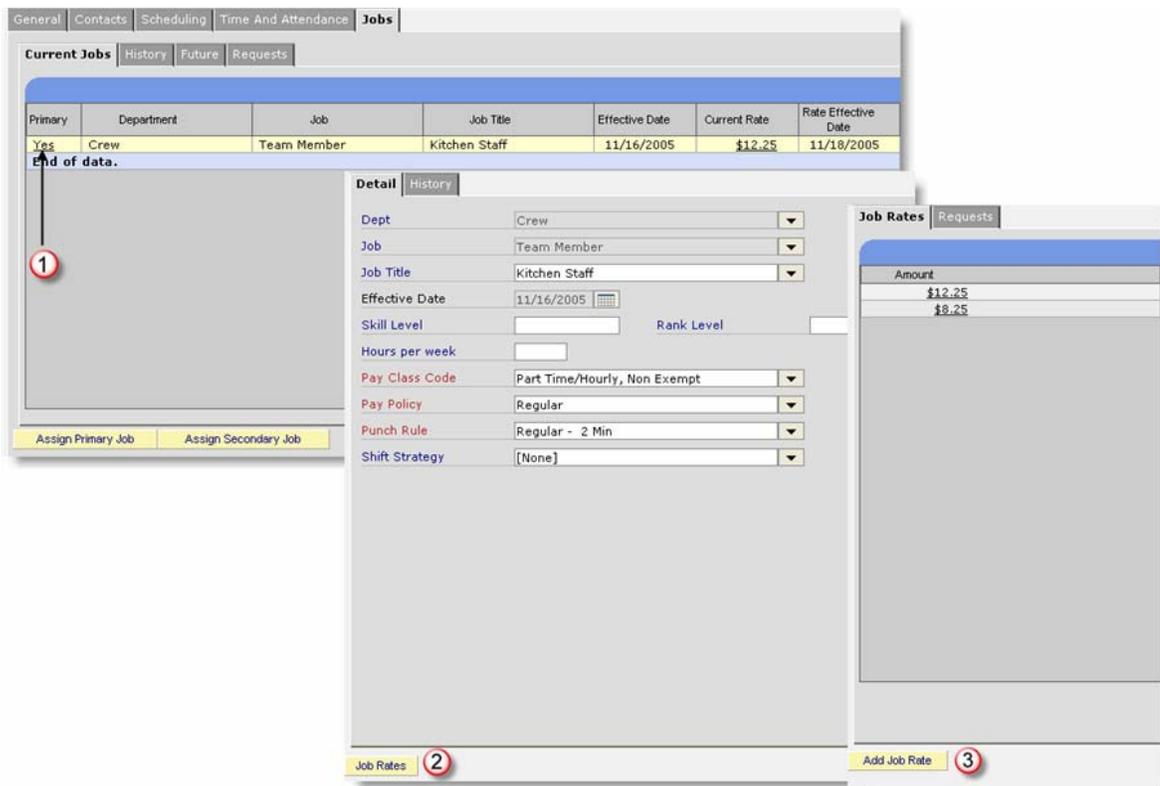
POS User Setup

Click Related Links tab at the top right of the Edit Employee page to navigate to the POS User set up.

POS User Configuration Tab (Figure 3.9)

1. **POS Pin**: This number is used to sign an employee onto a register. Currently, not applicable to Culvers. <u>Do not change the system generated number here</u>.
2. **Clock In Pin**: This number is used by the employee to clock in and out, and all other time keep functions.

   These two numbers **Should Not Be The Same!**

3. **Operator Mode**: Should be left as Cashier – Clock In Not Required.
4. **MSR Number**: This is the unique number encoded on the back of the Manager Swipe Card and should be entered when configuring a managers POS set up.
5. **Safe Drop Alert Amount**: This field will trigger an alert when a managers Safe Drop Amount is over a designated threshold. <u>Leave this blank for all employees</u>.

FIGURE 3.9
**POS User
Setup**

POS User Configuration	POS Security Role
Employee Member Id	DOrth4
POS PIN	758998
Clock In PIN	978933
Operator Mode	Cashier - Clock In Not Required
Primary Job	Team Member
MSR Number	
Safe Drop Alert Amount	

POS Security Role Tab (Figure 3.10)

Everyone must have a security role in order to Clock In without a manager override. Choose from options listed; multiple assignments can be made to one employee. These permissions apply to the POS only.

POS Security Role	Description
Access All	For upper management, allows all management functions including Store Management Applications functions (perform EOD, View Reports etc.) All POS functions are also allowed. Cannot view wages in SMW.
Cashier	Allows Clock In, Clock Out, some Coupons & Discounts, Recall Orders. Assign this to every employee.
Drive Thru Cashier	Same as Cashier, but needed to clock in on Drive Thru Registers
Shift Manager	Same as Access All without the ability to access any Store Management features

Limited D/T Cashier	Same as Cashier without the ability to cancel item from recalled order.
Discount Only	Allows discount and coupon permissions. Must be paired with Cashier and Drive Thru Cashier
No Refunds (Access All)	Same as Access All except no ability to give refunds
Access All no MSR Read	Same as Access All except no ability to read MSR cards
All SMW	SMW features only – includes wage viewing capability
Cashier Restrict Payment	Same as Cashier except requires a manager override when using Gift Certificates (Paper)

FIGURE 3.10
POS Security Role selection

Separating an Employee

Separating an employee keeps both your Active Employees list, and Labor Reports accurate by removing the employee information. The process also deactivates both the employee login to Blue Cube Enterprise, and the clock-in number at the POS.

1. You must be logged into Blue Cube Enterprise as Owner, Restaurant Manager, Restaurant Manager w/o Salary View or Payroll Management to perform this task.
2. Navigate to **Workforce Management ➔ Change Employee Status**
3. Click on the employee name, or use the **Search Options** button to located the employee
4. Click on either the **Separate** or **LOA** (Leave of Absence) buttons at the bottom of the screen (Figure 3.11 A)
5. Required fields are highlighted in red, all others are optional
   a. **Notice Date:** Select the date notice was given
   b. **Effective Date:** Select the date the status change will occur
   c. **Voluntary/Eligible for Rehire?:** Select the appropriate option
   d. If you would like to add more information about the status change, click on the **Add Comment**. (Figure 3.11 B)
6. After all information has been entered click on the **Save & Close** button.

FIGURE 3.11
Separating an employee
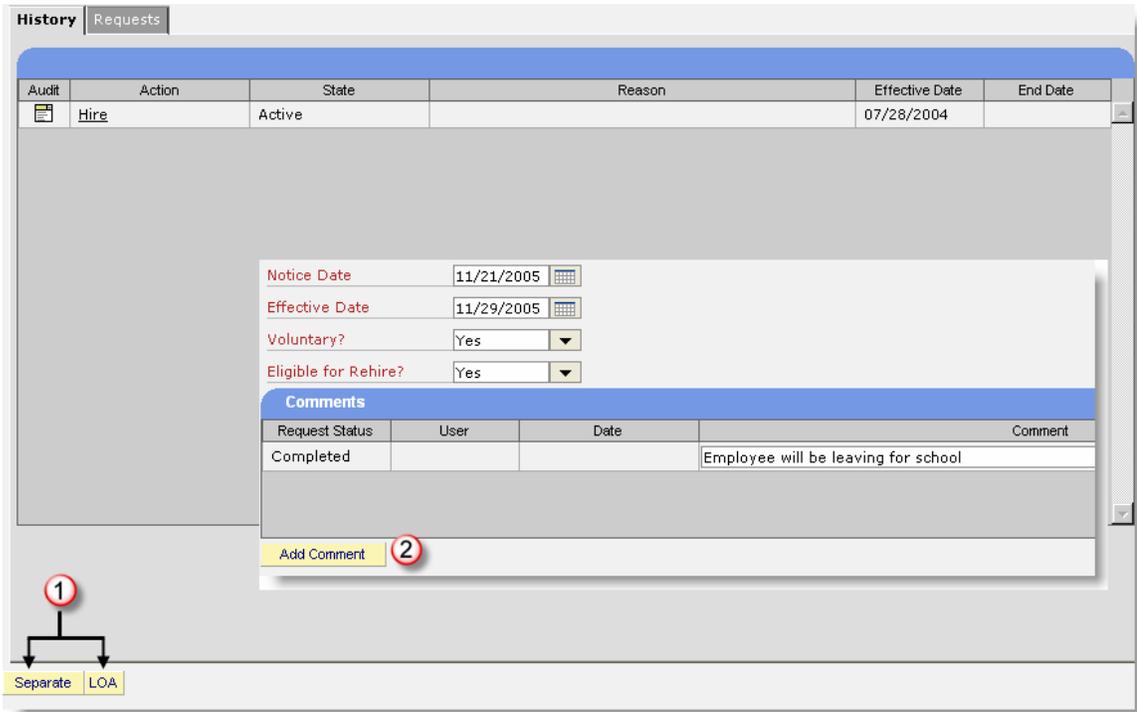
7. You can view separated employees by clicking on the **Search Options**, and then searching by either employee status, or employee name.

Daily Time Keep Functions

Review Unprocessed Time Punches
1. Click on the **Information Center** system folder.
2. Click on the **Workflow Calendar** and proceed with daily workflow.

Or
1. Click on the **Workforce Management** system folder.
3. Click on the **Time and Attendance** sub folder.
4. Click the **Fix Unprocessed Punches** task.

Review and Edit Timecards
1. Navigate to **Workforce Management ➔ Time & Attendance ➔ Edit Timecards**

2. Select your search parameters as described below (Figure 3-12)
- **Employee Option (1)**
  - **Only Show Employee Assigned to BU –** Shows only employees with your store BU set as home site
  - **Show Employees assigned to BU or borrowed by BU -** Will show both home site, and employee currently configured to your restaurant under BU sharing
  - **Show Employees borrowed by BU –** Will show any employee currently borrowed from another restaurant
  - **Show Employees borrowed from BU –** Will show any employees current borrowed to other restaurants

BLUECUBE 6.2 TRAINING MANUAL

- **Show Employees working for BU** – Will show all employees currently configured to work at the restaurant
- **Select (2)**– Will display the timecard range from either a Pay Period, or Date Range
- **Employees (3)**– Allows for the selection of specific employee to open in the timecard editor
- **Job Name (3)**– Allows for the selection of specific jobs to open in the timecard editor
- **Exception Type (4)**– Allows you to either selectPay Exception or Punch Exception
  - **Pay Exception** – Will only show punches with exception issues that occur with Meal, or Break punches
  - **Punch Exception** – Uses your schedule created in Blue Cube Enterprise to check for specific conditions that may have been met such as In Late, Out Early, No Show
- **Show only unpaired punches (5)**– Will show only punches that do not currently have both a Clock-in and a Clock-out
- **Sort by** – Will show punches grouped by Employee or BU

📁 Sorting by employee will allow for easier viewing of entire pay periods.

FIGURE 3.12
Edit Timecards option screen
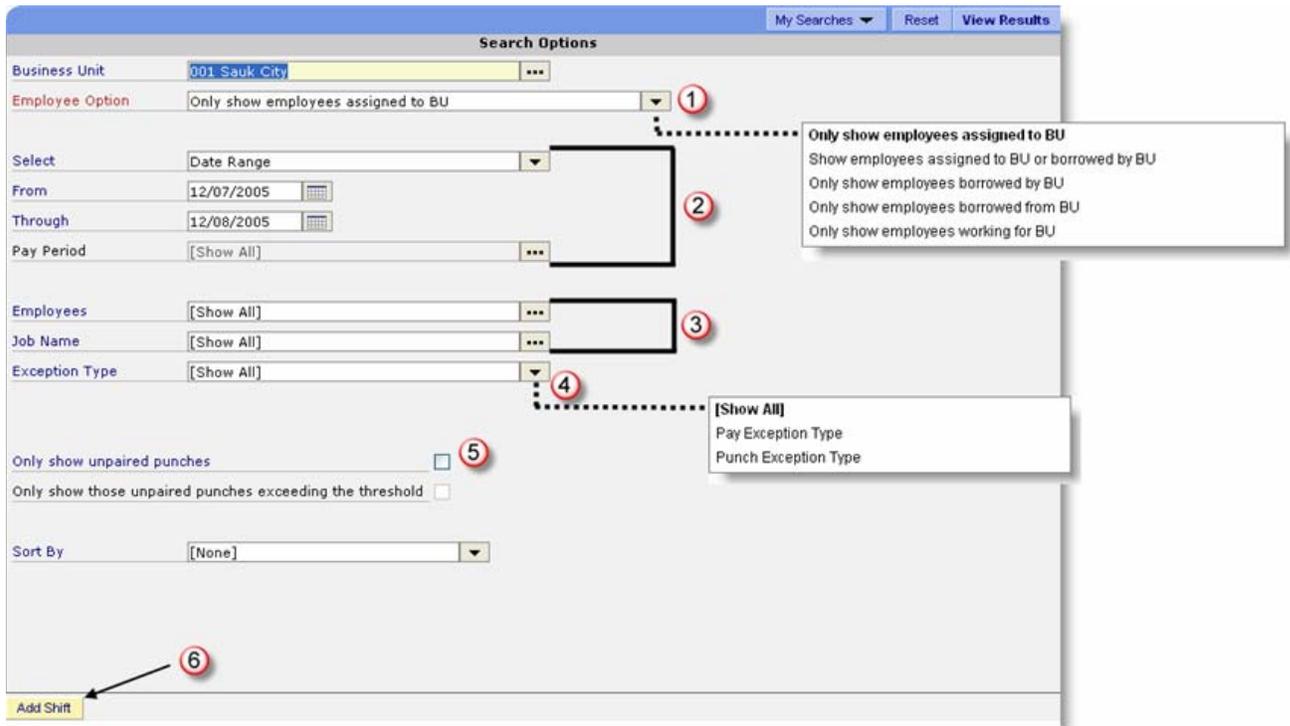
3. Once you have made your selection click on the **View Results** button to be taken to the edit timecards page. Alternatively, if you just want to add a shift, you can click the **Add Shift (6)** button located in the bottom left of the screen.

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> ✈   If you would like to add a shift please move ahead to the section labeled **Adding A Shift**

Review Timecards

The review timecards screen has many available options to help you better view and edit your employee's time keep. The following list corresponds with the example below.
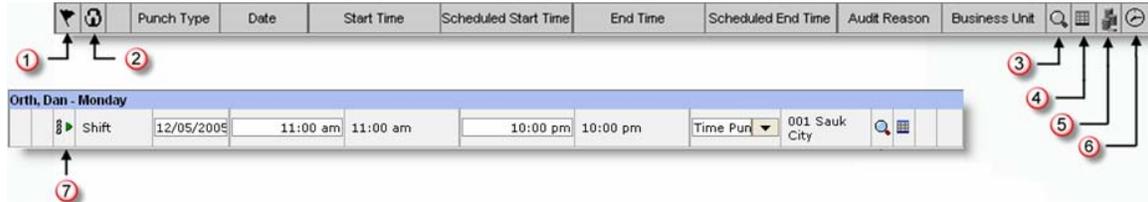
1. ⚑ This column is used to show if the shift has an unpaired punch. If the shift has an unpaired punch, a flag will appear in the column.

2. 🔒 This column is used to show if the shift belongs to a pay period that is closed. If the shift is part of a closed pay period a lock will show in the column.

3. 🔍 This column is used to show additional information about the shift such as Home BU, Job, and Gross Hours. Click on the magnify glass in the column to view this information.

4. ▦ This column is used to show raw punch information for the shift. Click on the graph in the column to view this information

5. 🖳 This column is used to show any pay exceptions that may be associated with the shift.

6. ⊘ This column is used to show any time punch exceptions that may be associated with the shift.

7. ⦂▶ This icon is used to edit the shift. Clicking on the icon will allow you to view Punch Details, Scheduled Details, and other shift related information

Adding A Shift

1. Click on the **Add Shift** button located at the bottom of the edit timecards screen.
2. From the Add Shift screen click on the **Employee Name** ··· button to bring up the employee selection screen. (Figure 3.13)
3. **Schedule –** If using the Blue Cube Enterprise scheduling solution, you will be able to select a day listed in the weekly schedule to associate the added time punch with.
4. **Job Name –** Will default to the employees primary job. However this can be changed to any job the employee currently has assigned to them.
5. **Audit Reason** – Displays a selectable list of why the timecard is being manually audited.

FIGURE 3.13
**Add Shift from
Edit Timecards**

6. Fill out the shift details (Date, Start and End Time) in the *Punch Details* section.
7. Breaks and meals can both be added by clicking on the **Add Meal/Break** button. If you are using the Scheduling portion of Blue Cube Enterprise, you can select to match up the added break or meal to a scheduled break or meal.

Retail Item Management

The following section will cover the actions needed to successfully manage your retail pricing in your restaurant using Blue Cube Enterprise.

Changing Retail Prices

Changing Individual Prices

1. Log into Enterprise under Owner, Restaurant Manager, Restaurant Manager w/o Salary View or Shift Manager user roles. Navigate to the following location: **POS Management ➜ Change Retails**.

2. Click the Ellipses (…) next to the Category option and select from the drop down menu. *(Figure 4.1.1)* Next click on the **View Results** button to view all of the categories to choose from. *(Figure 3.11 2)* You must make a selection from the **Categories** list *i.e.: Cheeseburgers, Cake Cones etc.*

FIGURE 4.1
Selecting change retails search options
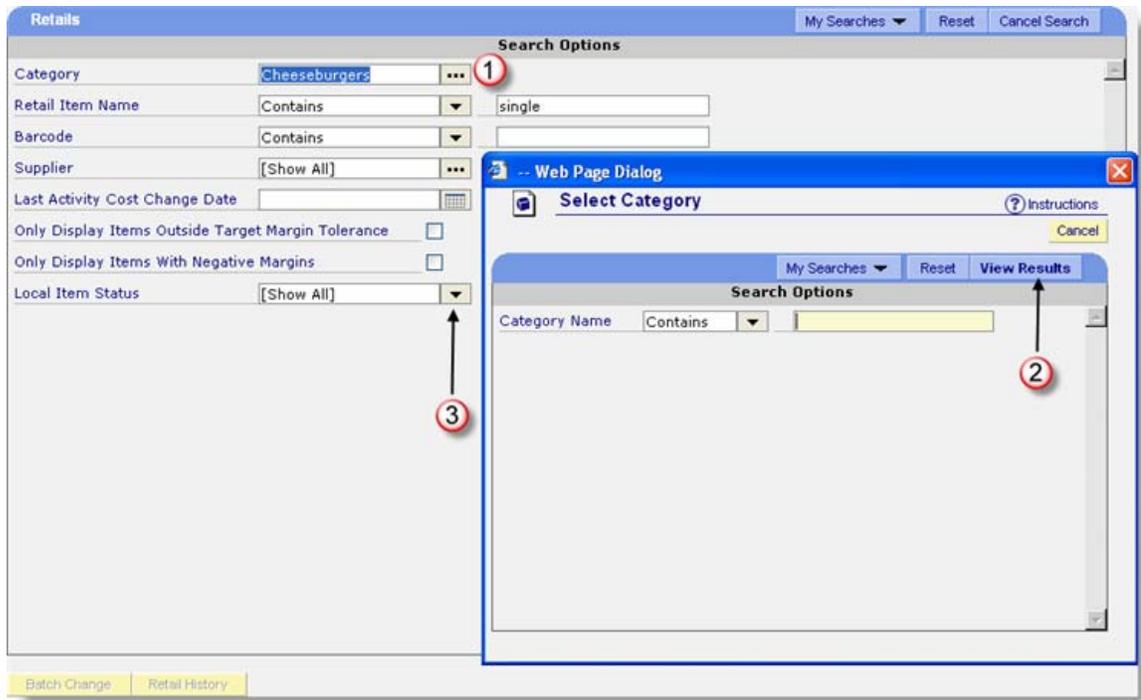
3. Click on the down arrow in the **Retail Item Name** and choose **Contains**, then type in part of the item name for the price change (*i.e.: blue, swiss, double, doub etc…*)
4. Enter other search options, such as put .01 in the Retail Range From search box to view all non $0 items.
5. Click on the drop down arrow in the **Local Items Status** drop down arrow and select *Show All (Figure 4.2. 3)*
6.
7. Click the **View Results** button at the top right of the page; all entries matching the search criteria will be displayed.
8. Click on the price you would like to change and key in the new price in the Retail column. (*Figure 4.2*) Click Save & Close when finished.

FIGURE 4.2
Changing Individual Retail Item Pricing

Changing Multiple Prices
Multiple pricing changes can be made at the same time in a "Batch" or group. *(Figure 4.3)*

1. Select all items on the page by clicking the green check mark at the top left or select multiple items by placing a check mark in the box

2. Click the **Batch Change** button on the bottom left of the screen. In the Batch Change box click the down arrow in the Price Type field.
3. Choose from the following options
    - **% Price Change** – Add or subtract retail price by a percentage
    - **+/- Price Change** – Add or subtract by a dollar amount to the retail price
    - **Set Price** – Changes all current selected items to the amount entered
    - **Set to Target Margin, Set To Suggested Retail, Set Margin Percent To** - These selections may be used at a later date, but are not currently used
4. In the **Price/Percent** text box enter in the amount you would like to modify the price by.
5. Click the **Apply Changes** button and all of the selected prices will be modified, and highlighted in blue.
6. Click on the **Save** or **Save & Close** buttons to confirm your changes.

FIGURE 4.3
Batch Changing Retail Items Pricing
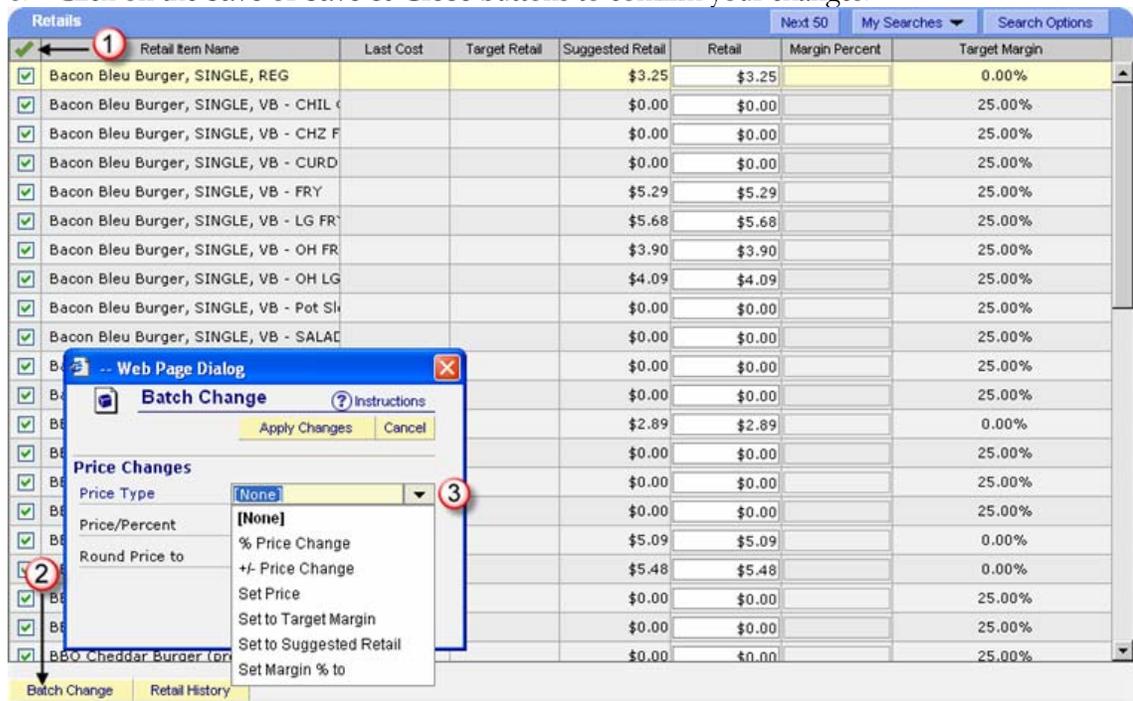
Substitution/Basket Pricing

Substitution pricing is the price adjustment seen when a substitution is made in a Value Basket, kids meal or dinner.

When making price changes with Baskets we only need to change the base prices, as the substitution pricing is set in the system and can be changed by contacting RDS or by using the Substitution Pricing utility in Store Manager Workstation (covered in the Store Manager Workstation manual).

The only prices that need to be changed in the back office are as follows
    - **REG** – the sandwich itself, the
    - **VB – FRY** or **VB – OH FRY** if in Ohio (the basic Value Basket)

> ▪ **VB – LG FRY** or **VB – OH LG FRY** if in Ohio (the basic Extra Size Value Basket).

All substitution pricing is based on these three prices.

Altering the other prices will have no effect on the price charged at the register as the only items sold on the register are the sandwich itself, the regular value basket and the extra size value basket. All other variations are a result of substitution pricing which is not configurable by store level personnel at this time.

> ✎ **Substitution pricing can be adjusted at the restaurant level. Please contact RDS or CfSi to change your substitution pricing.**

Downloading Pricing Changes

You must approve a **Pricing and Item Locks Download** for the pricing changes to take effect at the POS *(not a full download)*. This download will take considerably less time than a full download and can be done at anytime during the course of the day.

1. In Enterprise navigate to **POS Management → Approve Download**.
2. Click the arrow in the Download Type field and select **Pricing & Item Locks only**.
3. Click the box in front of your Business Unit Code and click the **Download** button at the top right of the page.
4. Navigate to **POS Management-->View Download Log** and refresh until the current download status is Awaiting Site Connect.
5. At the POS touch the **Store Mgmt**. button, swipe your card or enter your MSR number. Touch **Site Operations → Host Contact**.
6. From the menu at the bottom of the screen choose **Initiate Download**, a small dialogue box will appear with **Download Requested** in the window, touch the **Go Back** button.
7. Your changes will take approximately 20 minutes to download and take effect. You should see the green update box as shown in the example below.

Updates applied- touch to continue

Locking/Unlocking Items

Locking items provides a method to remove items that you do not sell from the register screens. Only main items and condiments can current be locked items. When locking main items and condiments, all modified retail items need to be locked in order for the item to be removed from the register screen *(Figure 4.4)*. Modifiers (such as soup varieties) can be locked, but will not disappear from the screen. Instructions and examples follow.

Instructions:

1. Log into Radiant Enterprise as Restaurant Manager, Restaurant Manager w/o Salary View, or Owner.
2. Navigate to **POS Management ➔ Sales Item Lock**.
3. In the Item Name drop-down menu you can select Starts With or Contains.
4. In the search box, type in the text that you'd like to search for.
5. Click the **View Results** button; a list of the items that start with (or contains) the search text will be displayed.

6. Click **Lock** or **Unlock** in the last column for the item that you would like to change. Only underlined text can be clicked upon.

FIGURE 4.4
Sales Item Lock

7. A dialog box will appear allowing you to lock or unlock the item. Check the box to lock the item or uncheck it to unlock.
8. Click **Save and Close.**
9. A dialog box will appear verifying that you want to lock/unlock the item, click **OK**.

Examples:

- If you want the veggie burger button to be removed from your screen, you would search for Starts with "veg". In the list that appears, you should lock all of the modified retail items for Veggie Burger. *(Figure 4.5)*

FIGURE 4.5
Search Results for "Veg" on the Sales Item Lock Screen

- You only need to lock the Veggie Burger, REG because that is the item that the POS button is associated with. However, we do recommend that all varieties of Veggie Burger be locked in order to be certain that the item does not appear on the register.

📂 Please feel free to call CfSi if you would like to know which item should be locked to remove a button

Explanation of modified retail item: Veggie Burger is a retail item and it is modified by REG, VB – CHZ FRY, etc. to form modified retail items such as Veggie Burger, REG; Veggie Burger, VB – CHIL CHZ, etc.

- If you want to remove Jalapenos from your menu, you would search for Contains "Jal". In the list that appears, *(Figure 4.6)* you will notice that there are modified items for Jalapenos and also another item called Side of Jalapenos. Locking all of the modified retail items for Jalapenos will remove the Jalapeno condiment from your menu, locking the Side of Jalapenos will remove the Side of Jalapeno button from the Side Of frame.

FIGURE 4.6
Side of and on Side difference on Sales Item Lock screen

- Locking modifiers is possible, but will not result in the removal of any buttons. Example: locking soup flavors or shake flavors will result in no buttons being removed and may result in unexpected errors when attempting to ring up these items.

Setting up Coupons

A list of all coupons assigned to your restaurant will be displayed (see below). There are two different assignments for coupons. *(Figure 4.7)*

- 🗔 - Locally assigned coupon at the restaurant level, and can be edited
- 🌐 - Globally assigned coupon available to all sites, and cannot be edited

FIGURE 4.7
Coupon setup showing assignments

Setting Up New Coupons

Coupon Information Tab
1. Log into Enterprise under the Restaurant Manager, Restaurant Manager w/o Salary View or Owner user role.
2. Navigate to **POS Management ➔ Coupon Setup**.
3. Click on **Add Coupon** to add a new coupon to view the Add Coupon page. *(Figure 4.8)*
4. **Coupon Name** - In the field, type the name of the coupon. This is what will display on the POS as well and may be truncated if too long, please download and test before using the coupon.
5. **Description** - enter a description for the coupon, this is an optional field.

FIGURE 4.8
Coupon setup

6. **Coupon Type** – Determines in what manner that you would like the coupon applied. Click the drop-down arrow to select one of the following discount types:
    - Preset Amount – Coupon will deduct the predefined amount from the total
    - Prompted Amount – Coupon will prompt the employee for the amount to be discounted
    - Prompted Percent – Coupon will deduct the predefined percent from the total
    - Preset Percent - Coupon will prompt the employee for the percent to be discounted
    - Buy One Get One Free – Coupon will automatically add an additional item to the transaction and subtracts that item price.
    - Free Item – Coupon will subtract the price of an item.
7. **Amount/Percent** - If you select a preset type, enter an amount or percentage you would like to apply.
8. **Transaction Type** – This determines how the coupon will be applied to either the item or the entire transaction. Item level discounts are applied to the first item on the order from the coupon item group selected.
9. **Discount Group** – Leave at "All Discounted Items". If you believe you have a case in which "Non Discountable Items" would apply, (such as Gift Cards) please contact CfSi before implementing.
10. **Device Group** – Determines how the coupon should be routed. You should always select Discounts.
11. **Device Control** – Determines the print option for the coupon typically this is "print receipt optional".

12. **Reduces Tax** – Determines whether the coupon reduces the sales tax amount for the order. <u>This should almost always be checked</u>. <u>If you believe you have a case in which this should be unchecked, please contact CfSi.</u>

13. Click on the **Options** tab *(Figure 4.9)*

<u>Options Tab</u>

1. **Includes Upcharge?** – Check if the coupon covers the extra cost associated with upsizing an item.
2. **Allow Only Once/Transaction** – Check if you would like the coupon to only be applied once per transaction.
3. **Coupon by Destination**- Check if you want to enable the coupon to be used only at a certain location, such as Eat In, Park, etc. Click the check boxes next to the destinations

FIGURE 4.9
**Coupon setup
Options Tab**
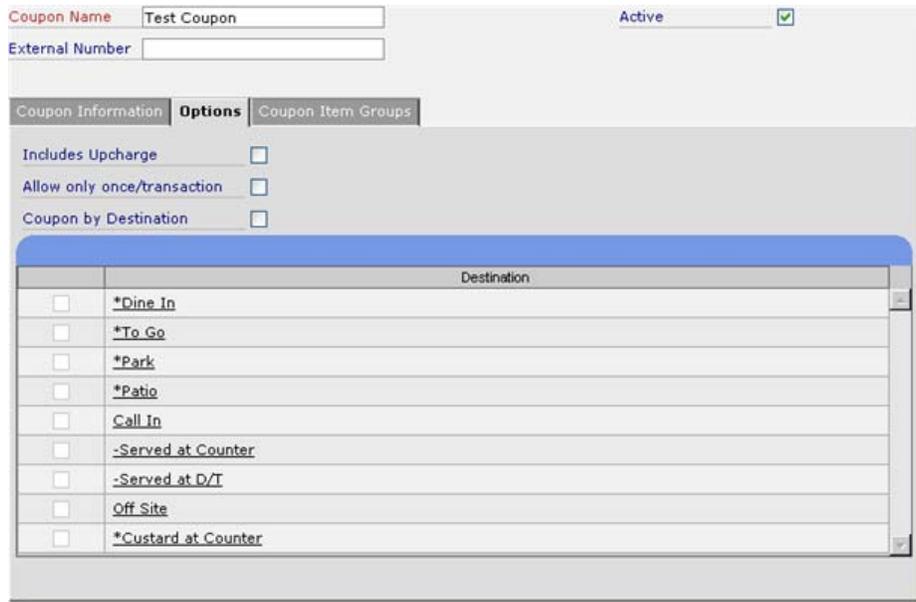
<u>Coupon Item Groups</u>

1. Click the box next to the coupon item group to which the coupon belongs. You can click on the item group to see what item the group contains. *(Figure 4.10)*
2. Click the **Save & Close** button.

📁 Coupon groups restrict when the coupon can be used on the POS. If an item in the group is not on the order, the coupon will not be visible in the coupon selection list. If more than one group is selected, an item from <u>each</u> group will need to be rung in for the coupon to appear on the list. If there is a group that you need that is not in the list or if you need help determining which coupon group to use call CfSi.

FIGURE 4.10
Coupon setup
Coupon Item
Groups Tab
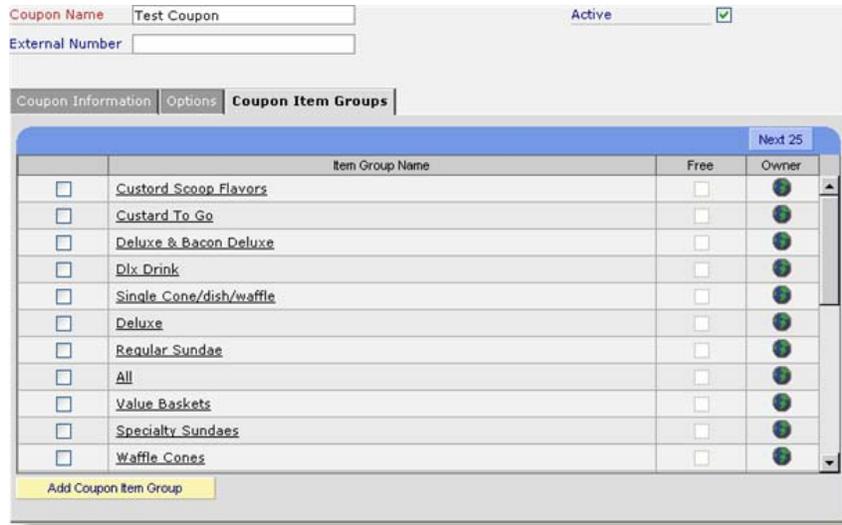
Setting up Discounts

A list of all discounts assigned to your restaurant will be displayed (see below). There are two different assignments for discounts. *(Figure 4.11)*

- 🖥 - Locally assigned coupon at the restaurant level, and can be edited
- 🌐 - Globally assigned coupon available to all sites, and cannot be edited

FIGURE 4.11
Discount Setup
assignment
levels

Setting up New Discounts
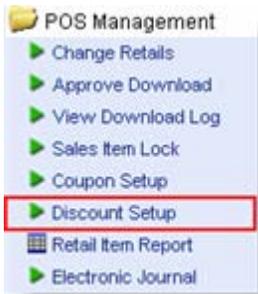
1. Log into Enterprise under the Restaurant Manager, Restaurant Manager w/o Salary View or Owner user roles.
2. Navigate to POS Management ➔ Discount Setup.
3. Click on **Add Discount** to add a new discount to view the Add Discount page. *(Figure 4.12)*
4. **Discount Name** - In the field, type the name of the discount. This is what will display on the POS as well.
5. **Description** - enter a description for the discount, this is an optional field.
6. **Reduces Tax** – Determines whether the coupon reduces the sales tax amount for the order. This should always be checked. If you believe you have a case in which this should be unchecked, please contact CfSi.
7. **Discount Type** – Determines in what manner that you would like your discount applied. Click the drop-down arrow to select one of the following discount types:
   - Preset Amount – Discount will deduct the predefined amount from the total
   - Prompted Amount – Discount will prompt the employee for the amount to be entered
   - Prompted Percent – Discount will deduct the predefined percent from the total

- Preset Percent - Discount will prompt the employee for the percent to be entered
- Price Override

8. **Amount/Percent** - If you select a preset type, enter an amount or percentage you would like to apply.
9. **Employee Discount?** – If checked will prompt the employee to select an employee name for the discount. However, there is no current way to track results.
10. **Transaction Type** – This determines how the coupon will be applied to either the item or the entire transaction. Item level discounts are applied to the first item on the order from the coupon item group selected.
11. Click the **Employee Discount** check box if the discount applies to employees only.
12. **Discount Group** – Leave at "All Discounted Items". If you believe, you have a case in which "Non Discountable Items" would apply, (such as Gift Cards) please contact CfSi before implementing.
13. **Device Group** – Determines how the coupon should be routed. You should always select Discounts.
14. **Device Control** – Determines the print option for the coupon typically this is "print receipt optional".
15. **Discount Level** - Determines whether the discount is applied to the item or whole transaction.
16. **Require Reason Code**? – Prompts the employee to select a reason from the discount reasons list.
17. Click the **Save & Close** button

FIGURE 4.12
Discount Setup screen

Reports

The following section will cover the reports that are available in Blue Cube Enterprise. The reports will be broken into several sections, to help with a better understanding of how each report can be fully utilized to its fullest potential.

Daily Reports

Sales Reports
- Quarter Hour Sales Activity Report
- Day Part Category Sales Report
- Hourly Sales Activity Report
- Sales Mix Report
- Sales Mix By Day Part
- Weekly Operations Summary Report
- Sales Mix by Retail Item Group

Quarter Hour Sales Report
Navigation: Sales Reports ➜ Quarter Hour Sales Activity Report

Description: This key report contains real time non-salaried (hourly) labor information: labor cost, labor % of net sales and transactions per labor hour. It also contains real-time sales information: net sales, transaction counts, sales per labor hour. The report receives updated sales and labor information every 15 minutes. Scroll to the bottom of the report to display the day's current totals.

Quarter Hour Sales Activity Report
Business Unit:
Start Business Date: 08/02/2005
End Business Date: 08/02/2005
Report Time: 10/23/2005 09:28:58

Time Period Begins	Net Sales	Trans Count	Estimated Labor Cost	Labor Hours	Labor Cost % Net Sales	Net Sales / Labor Hour	Trans/ Labor Hour
12:00 PM							
12:00 PM	$389.71	31	$29.82	3.50	7.65%	$111.35	9
12:15 PM	$250.69	36	$29.82	3.50	11.90%	$71.63	10
12:30 PM	$224.55	38	$29.82	3.50	13.28%	$64.16	11
12:45 PM	$206.25	27	$29.82	3.50	14.46%	$58.93	8
12:00 Subtotal	$1,071.20	132	$119.30	14.00	11.14%	$76.51	9
01:00 PM							
01:00 PM	$167.79	28	$29.82	3.50	17.77%	$47.94	8
01:15 PM	$151.32	17	$29.82	3.50	19.71%	$43.23	5
01:30 PM	$124.51	18	$27.71	3.30	22.26%	$37.69	5
01:45 PM	$106.91	16	$23.75	2.78	22.21%	$38.46	6
13:00 Subtotal	$550.53	79	$111.11	13.08	20.18%	$42.08	6
02:00 PM							
02:00 PM	$147.93	24	$20.18	2.30	13.64%	$64.32	10
02:15 PM	$91.95	15	$17.73	2.00	19.28%	$45.98	8
02:30 PM	$78.69	18	$16.89	2.00	21.46%	$39.35	9
02:45 PM	$78.25	17	$17.01	2.02	21.74%	$38.80	8
14:00 Subtotal	$396.82	74	$71.80	8.32	18.10%	$47.71	9
03:00 PM							
03:00 PM	$84.99	16	$18.52	2.28	21.79%	$37.28	7
03:15 PM	$59.90	13	$18.24	2.25	30.45%	$26.62	6
03:30 PM	$71.89	11	$18.24	2.25	25.37%	$31.95	5
03:45 PM	$43.81	10	$16.92	2.07	38.61%	$21.20	5
15:00 Subtotal	$260.59	50	$71.91	8.85	27.60%	$29.46	6
04:00 PM							
04:00 PM	$76.92	13	$19.80	2.50	25.75%	$30.77	5
04:15 PM	$66.34	18	$19.40	2.45	29.24%	$27.04	7
04:30 PM	$118.41	16	$16.09	2.01	13.59%	$58.81	8
04:45 PM	$132.72	17	$16.97	2.12	12.79%	$62.70	8

Previous | Print | Direct Print | Highlight Setup | Export | Save | Forward | Expand All | Collapse All

Date Range: Can be run for any 1 day period, either in the past or the present.

✎ **Quarter Hour Sales Report does not contain salaried hours, overtime hours, or meal/break hours.**

Application: The Quarter Hour Sales Activity Report is meant to be used as "Gut Check" reporting tool. Since the report is updated every 15 minutes, it is a good report t o use when trying to quickly view your sales data for the day. The report is not meant to be utilized as a real-time labor-reporting tool, as it will only show your hourly employee wages with the above mentioned restrictions. Try to develop a mental baseline of where your Labor Cost % of Net Sales should be, and use the Quarter Hour Sales Activity Report to validate your labor percentage.

Sales Reports
- Quarter Hour Sales Activity Report
- Day Part Category Sales Report
- Hourly Sales Activity Report
- Sales Mix Report
- Sales Mix By Day Part
- Weekly Operations Summary Report
- Sales Mix by Retail Item Group

Hourly Sales Activity Report
Navigation: Sales Reports➜ Hourly Sales Activity Report

Description: This report lets you view sales and non-salaried (hourly) labor information at hourly intervals. Scroll to the bottom of the report to display the days current hourly totals. This report has several more fields than the Quarterly Hour Sales Activity Report, such as **Gross Sales, Refunds,** and **Avg Gross Sale.**

Time Period Begins	Gross Sales	% Gross Sales	Net Reductions	Refunds	Net Sales	Trans Count	Avg Gross Sale	Avg Net Sale	Labor Cost	Labor Hours	Labor Cost / Trans	Labor Cost % Net Sales	Gross Sales / Labor Hour	Net Sales / Labor Hour
12:00 AM														
01:00 AM														
02:00 AM														
03:00 AM														
04:00 AM														
05:00 AM														
06:00 AM														
07:00 AM														
08:00 AM														
09:00 AM														
10:00 AM	$159.99	2.00%	$9.37	$0.00	$150.62	28	$5.71	$5.38						
11:00 AM	$589.55	7.38%	$30.01	$1.00	$558.54	75	$7.97	$7.45						
12:00 PM	$1,020.21	12.78%	$41.98	$0.00	$978.23	118	$8.65	$8.29						
01:00 PM	$724.70	9.08%	$48.85	$0.00	$675.85	89	$8.14	$7.59						
02:00 PM	$548.02	6.86%	$23.44	$25.84	$498.74	80	$6.94	$6.23						
03:00 PM	$502.34	6.29%	$38.21	$18.96	$445.17	76	$6.79	$5.86						
04:00 PM	$464.08	5.81%	$37.43	$0.00	$426.65	75	$6.19	$5.69						
05:00 PM	$947.24	11.86%	$73.69	$0.00	$873.55	114	$8.31	$7.66						
06:00 PM	$623.35	7.81%	$30.30	$0.00	$593.05	84	$7.42	$7.06						
07:00 PM	$1,065.68	13.35%	$60.32	$0.00	$1,005.36	109	$9.78	$9.22						
08:00 PM	$744.47	9.32%	$44.54	$0.00	$699.93	81	$9.19	$8.64						
09:00 PM	$521.73	6.53%	$10.66	$0.00	$511.07	75	$6.96	$6.81						
10:00 PM	$73.79	0.92%	$0.44	$0.00	$73.35	12	$6.15	$6.11						
11:00 PM														
Total	$7,985.15	100.00%	$449.24	$45.80	$7,490.11	1,016	$7.89	$7.37	$0.00	0.00	$0.00	0.00%	$0.00	$0.00

Previous | Print | Direct Print | Highlight Setup | Export | Save | Forward

📁   The Hourly Sales Activity Report will only show correct labor amounts after the day you are viewing has been posted. This includes both hourly and salaried wages.

Date Range: This report can be run for the following time ranges: **Day, Week, Month,** and **Period**

Application: The Hourly Sales Activity Report can be used to give you a good overview of a day that has been posted. Key items that you may want to look out on this report are **Refunds** and **Labor Cost % Net Sales**. Checking these two items on this report daily can help you determine if a more in depth analysis of a value that does not appear quite right.

Daily Reconciliation Report

Navigation: Financial Reports ➔ Daily Reconciliation Report

Financial Reports
- ▶ **Enhanced Daily Summary Report**
- ▶ Discounts Report
- ▦ Daily Financial Report
- ▦ Deposit Report
- ▦ Paid In Report
- ▦ Paid Out Report
- ▦ Pickup Summary Report
- ▦ Profitability Report
- ▦ Daily Reconciliation Report
- ▦ Shift Reconciliation Report
- ▦ Safe Count Report

| My Searches ▼ | | Add Comment | PDF Report | Options |

Daily Reconciliation Report

Business Unit:

Start Business Date: 08/06/2005
End Business Date: 08/06/2005
Report Time: 12/29/2005 16:05:07

Cashier	Shift ID	
	1	
	1	
zOrder, Taker	1	
zReg, One	1	
zReg, Three	1	
zReg, Two	1	
zzDrive, Thru	1	
zReg, One	2	
zReg, Three	2	
zReg, Two	2	
zzDrive, Thru	2	
Gross Sales	$8,095.15	
Discounts (-)	$257.62	
Coupons (-)	$191.62	
Refunds (-)	$45.80	
Expected Net Sales	$7,600.11	
Sales Variance	$0.00	
Actual Net Sales	$7,600.11	

	Amount	Qty
Actual Net Sales	$7,600.11	
Net Tax	$406.09	
Total Net Sales Plus Tax	$8,006.20	
Sales Count		1,012
Average Gross Sales	$8.00	
Total Net Sales Plus Tax	$8,006.20	
Non-Sales Items	$0.00	
Total Paid Ins (+)	$0.00	
Total Paid Outs (-)	$0.00	
Previously Undeposited Funds (+)	$0.00	
Total Responsibility	$8,006.20	

	Amount	
Cash	$6,591.96	
Business Check	$552.12	
Credit	$777.23	
GC Redeemed	$10.00	
Culver's Card Redeemed	$71.86	
Total Accounted For	**$8,003.17**	
Income (+)	$7,144.08	
Change Fund Adjustment (-)	$0.00	
Available Funds (=)	$7,144.08	
Deposits (-)	$7,144.08	
Undeposited (=)	$0.00	
Sum of Shift Over/(Short)	($3.03)	
Sum of Safe Over/(Short)	$0.00	
Sum of Sales Over/(Short)	$0.00	
Daily Over/(Short)	**($3.03)**	

	Amount	Qty
No Sale Transactions	$0.00	0
Item Deletion	$803.70	266
Item Deletions Before Total	$777.88	256
Item Deletions After Total	$25.82	10
Item Deletions After Tender	$0.00	0
Cancelled Transactions	$0.00	0
Store Value Card	$110.00	6

Print | Direct Print | Highlight Setup | Export | Save | Forward

Description: This report summarizes all of the reconciled sales and cash drawer data for a posted date. The report allows for the review of: **Net Sales**, **Coupons**, **Discounts**, **Refunds**, **Gift Certificates**, **Gift Cards**, **Tendered**; **Drawer Loans**, **Pickups (Skims)** and defines Cash Responsibilities into: Cash, Check, Gift Certificates, Culver Cards and Credit.

Date Range: This report can only run for a **Day**, and that day must be a posted day.

Application: This report allows you to view all of your financial information for a posted day. Use the report to help find trends, and other items that you think it is appropriate to take action on. The **Daily Reconciliation Report** is a good starting point when trying to rectify cash issues that you may be experiencing. By clicking on the underlined cashier (zOrder, Taker zReg, One etc) you will open the **Shift Reconciliation Report**, allowing for a more granular view of the shift.

Shift Reconciliation Report

Navigation: Financial Reports ➔ Shift Reconciliation Report

Description: This report is similar to the Daily Reconciliation Report but views one registers information separately. It breaks down the Total Responsibilities for the shift and allows review of: Net Sales, Coupons, Discounts, Refunds, Gift Certificates, Gift Cards, Tendered, Drawer Loans, Pickups (Skims) and defines Cash Responsibilities into: Cash, Check, Gift Certificates, Gift Cards, and Credit. It also displays NO SALE TRANSACTIONS and the Shift Over/Short totals.

Date Range: This report can only run for a **Day,** and that day must be a posted day. The register, (Cashier Name) can further define the parameters of the report

Application: This report allows you to view all of your financial information by register for a posted day. This report allows for a more granular view for each of the registers financial information. Use this report after you have viewed the **Daily Reconciliation Report** to help pinpoint cash problems per a single register.

Daily Financial Report

Navigation: Financial Reports ➔ Daily Financial Report

Financial Reports
- ▶ **Enhanced Daily Summary Report**
- ▶ Discounts Report
- ▦ Daily Financial Report
- ▦ Deposit Report
- ▦ Paid In Report
- ▦ Paid Out Report
- ▦ Pickup Summary Report
- ▦ Profitability Report
- ▦ Daily Reconciliation Report
- ▦ Shift Reconciliation Report
- ▦ Safe Count Report

Daily Financial Report

Business Unit:
Business Date: 09/01/2005
Report Time: 01/04/2006 16:14:45

Gross POS Sales	$6,241.69
Sales Variance	$0.00
Discounts and Refunds:	
86 Discounts (-)	$131.18
0 Refund Discount (+)	$0.00
Net Discounts (-)	$131.18
37 Coupons (-)	$143.95
0 Refund Coupons (+)	$0.00
Net Coupons (-)	$143.95
0 AutoDetect Disc (-)	$0.00
0 Refund AutoDetect (+)	$0.00
Net AutoDetect Disc. (-)	$0.00
5 Sales Refunds (+tax) (-)	$14.92
0 Net Comps (-)	$0.00
Net Sales (+tax)	$5,951.64
Sales Tax	$304.27
Value Added Tax	$0.00
Net Sales	$5,647.37
824 Sales Count	
Avg Gross Transaction	$7.57
$1 GC Redeemed	$7.00
$10 GC Redeemed	$10.00
$5 GC Redeemed	$15.00
Check	$279.34
Credit - Online Exact	$1,280.52
Culver's Card - Online	$38.65
Net Sales (+tax)	$5,951.64
0 Start Amount (+)	$0.00
0 Paid Ins (+)	$0.00
0 Drawer Loans (+)	$0.00
0 Local Acct Payments (+)	$0.00
0 Drawer Pickups (-)	$0.00
0 Paid Outs (-)	$0.00
0 End Amount (-)	$0.00
Final Pickup (-)	$0.00
Store Value Card	$5.00
Total Tenders Due (=)	$5,956.64
Business Check	$279.34
Credit	$1,280.52
Culver's Card Redeemed	$38.65
GC Redeemed	$32.00
Total Non Cash Due (=)	$1,630.51
Cash Due (=)	$4,326.13
0 No Sale Transactions	
157 Item Deletion	$422.35
150 Item Deletions Before Total	$404.91
7 Item Deletions After Total	$17.44
0 Item Deletions After Tender	$0.00
0 Cancelled Transactions	$0.00
0 Misc. Sales Transactions	$0.00
0 Tax Exempt Transactions	$0.00
0 Safe Deposits	$0.00

Print | Direct Print | Highlight Setup | Export | Save | Forward

Description: This report is used to give a comprehensive view of your daily business and is Identical to the Daily Financial Report generated on POS. This report does not show

reconciled data, as the information in the report is taken directly from the POS. The information in the report is updated every 15 minutes.

Date Range: This report can be run for a single day period only. This report can be used to look at current day information for shifts that have not yet been closed.

Application: This report is useful for giving you an overview of current activity happening on the POS. Since the report is update every 15 minutes, you can get close to real-time information on such areas as Loss Prevention. It is good practice to review and file this report either in this format or by using the tapes from the registers

Period Reports

Use these reports as well as others you find to be useful for reviewing the performance of your restaurant over the course of a (pay) period or by the month. Evaluate trends and averages; look for inconsistencies in labor usage, cash handling error trends, sales increases while featuring daily specials.

Weekly Operations Summary Report
Navigation: Sales Reports ➔ Weekly Operations Summary Report

Description: This report is used to view both the week total and current yearly total for Net Sales. A comparison with variance percentage is also made for the net sales amount of the previous year. The report also breaks out the daily net sales amount by day part, allowing you to view the lunch, afternoon, diner, etc. day part totals for your restaurant.

Date Range: This report can be run for a week period (Monday to Sunday) for each calendar year.

Application: This report is extremely useful to track performance versus the same time last year. The report allows you to view variance percentages for both Net Sales and Total Transaction giving you a clear picture of how your restaurant is currently performing.

Weekly Operations Sun My Searches ▼   Add Comment   PDF Report   Options

Weekly Operations Summary Report
12/18/2006 - 12/24/2006

Business Unit: Report Time: 12/31/2006 02:20:19

RptGrossSalesByDaypart

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
unknown	$4,235.90	$5,336.81	$5,273.26	$5,492.02	$7,871.33	$5,877.59	$2,708.19	$36,795.10
Daily Total	$4,235.90	$5,336.81	$5,273.26	$5,492.02	$7,871.33	$5,877.59	$2,708.19	$36,795.10
WTD Total	$4,235.90	$9,572.71	$14,845.97	$20,337.99	$28,209.32	$34,086.91	$36,795.10	

Daily Net Sales Comparison

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Current Year	$4,002.17	$4,968.07	$4,931.18	$5,102.83	$7,486.97	$5,638.80	$2,472.83	$34,602.85
Last Year	$3,922.25	$4,221.54	$5,165.53	$5,826.12	$7,479.79	$2,432.90		
Change From Last Year	$79.92	$746.53	($234.35)	($723.29)	$7.18	$3,205.90		
Percent Change from Last Year	2.03%	17.68%	(4.53)%	(12.41)%	0.09%	131.77%		

YTD Net Sales Comparison

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
Current Year YTD	$2,075,991.04	$2,080,959.11	$2,085,890.29	$2,090,993.12	$2,098,480.09	$2,104,118.89	$2,106,591.72	
Last Year YTD	$2,126,356.17	$2,130,577.71	$2,135,743.24	$2,141,569.36	$2,149,049.15	$2,151,482.05	$2,151,482.05	
Change From Last Year	($50,365.13)	($49,618.60)	($49,852.95)	($50,576.24)	($50,569.06)	($47,363.16)	($44,890.33)	
Percent Change from Last Year	(2.36)%	(2.32)%	(2.33)%	(2.36)%	(2.35)%	(2.20)%	(2.08)%	

Transaction Count by Destination

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Total	
	Drive	Total	Drive	Total	Drive	Total	Drive	Total	Drive	Total	Drive	Total	Drive	Total	Drive	Total
Current Year	310	656	354	749	341	757	392	790	438	959	344	745	115	298	2,294	4,954
Last Year	285	623	305	636	330	738	354	810	383	920	114	287				
Change From Last Year	25	33	49	113	11	19	38	(20)	55	39	230	458				
Percent Change from Last Year	8.77%	5.29%	16.06%	17.76%	3.33%	2.57%	10.73%	(2.46)%	14.36%	4.23%	201.75%	159.58%				

Pay Summary Report

Workforce Management
- ▶ Employee Setup
- ▶ Employee Sharing
- ▶ Change Employee Status
- 🔲 Pay Summary Report
- 📁 Human Resources Reports
- 📁 Scheduling Reports
- 📁 Scheduling
- 📁 Time & Attendance Reports
- 📁 Time & Attendance

Navigation: Workforce Management ➔ Pay Summary

Description: This report is used to show the actual labor dollar amounts for all employees in your restaurant. These totals include all POS punch information, and any adjustment or timecard edits that may have occurred during the pay period. Information is broken down for each employee by job, and category definition (regular/overtime). This report can be customized for what you would like to see displayed. The following help explain the report options for the Pay Summary report:

- Show Pay Amounts – This field determines whether specific pay information will be shown for each employee on the report

📁 The role of Schedule Manager or Restaurant Manager w/o Salary View **will not** be able to view Salary or Wage information for Management. It is recommended if you are using a 3rd party payroll or accounting service that the use either the External Payroll Management or External Payroll Management – no sales

- Include Salaried Employee – This field determines whether if salaried employee's labor information will appear in the report. This also determines if salaried employee's labor information will appear in the total store amount.

- Totals Only – Will display only the total amounts for both hours worked and dollar amount. The day-by-day break down will not be displayed with totals only selected.

- Include Pay Group ID/Payroll ID – Will displayed Pay Group or Payroll ID values if entered in Employee Setup, Employee Tax & Payroll Information.

- Include Back Pay – Will display any back pay information for the appropriate employees for the selected pay period.

- Include Pay Notifications –

- Refresh Report Data – Will update the Pay Summary report with any outstanding changes that may have been recently made.

✎ **Only 2 Pay Periods can remain open in Enterprise. If you allow 2 past pay periods to remain open, the current Pay Period will not display an information. The Quarter**

Hourly Report or the Profitability Report will not display and labor information. Time punches are still recorded and will display when past pay periods are posted.

Date Range: This report can be run for any pay period in the past, as well as the two currently open pay periods.

Application: This report can be used to provide your payroll service provider with all of your restaurants pay period information.

📁 Payroll exports have been configured for both ADP, and Paychex. This feature allows your restaurants payroll information to be directly exported from the Blue Cube Back office, to one of the above-mentioned payroll providers. If you are interested in using this feature, please contact a member of the CfSi IS Department.

This report is also a good starting point when trying to resolve time punch problems. If the employee is an hourly employee, all shifts that are accounted for in the Back Office will appear in the report.

If you suspect that, an employee is missing a shift from the information you find in the Pay Summary report, the next place to check for the employee punch information would be the Raw Punch Report. The Raw Punch Report will contain all the time punch information from the POS. If missing a shift in the Pay Summary report check the same day in the Raw Punch Report, and look for any exceptions or rejections that may appear for the employee. From this point, you should be able to determine whether the issue is a schedule validation issue, if you have schedule validation configured, or an issue that may require assistance from CfSi of RDS.
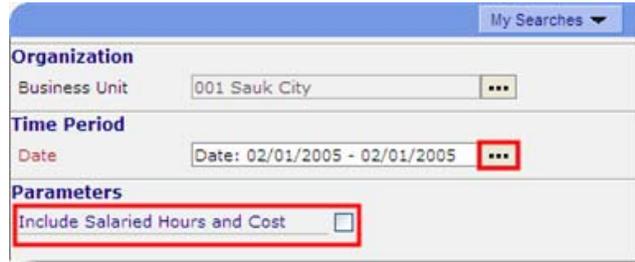
Profitability Report

Financial Reports
▶ Enhanced Daily Summary Report
▶ Discounts Report
▦ Daily Financial Report
▦ Deposit Report
▦ Paid In Report
▦ Paid Out Report
▦ Pickup Summary Report
▦ **Profitability Report**
▦ Daily Reconciliation Report
▦ Shift Reconciliation Report
▦ Safe Count Report

Navigation: Financial Reports ➜ Profitability Report

Description: This report allows you view sales and labor information all in one report. This report can be configured to show labor with, or without salaried labor dollars. Labor information on this report includes all posted labor data, as well as time punch edits performed in the back office.

		My Searches ▼
Organization		
Business Unit	001 Sauk City	•••
Time Period		
Date	Date: 02/01/2005 - 02/01/2005	•••
Parameters		
Include Salaried Hours and Cost	☐	

Date Range: This report can be run for the following date ranges: **Day, Week, Month, Year, Period**

Application: This report is very useful in trying to calculate many important labor figures for your restaurant. Labor statistics such as **Average Hourly Wage**, and **Total Salaried Labor** can be found by using the calculations listed below.

Profitability Report

Business Unit:

Start Business Date: 08/01/2005
End Business Date: 08/07/2005
Report Time: 02/16/2006 09:34:22

Week Begins	Gross Sales	Net Reductions	Refunds	Net Sales	Sales Count	Total Trans Count	Avg Gross Sale	Avg Sale After Net Reductions	Avg Net Sale
8/1/05	$53,689.87	$2,766.46	$100.90	$50,822.51	6,893	6,909	$7.79	$7.39	$7.36
Average	$53,689.87	$2,766.46	$100.90	$50,822.51	6,893	6,909	$7.79	$7.39	$7.36
Total	$53,689.87	$2,766.46	$100.90	$50,822.51	6,893	6,909	$7.79	$7.39	$7.36

Week Begins	Category Sales	Destination Sales	Labor Hours	Labor Cost	Labor Cost / Trans	Labor Cost % Net Sales	Gross Sales / Labor Hour	Net Sales / Labor Hour
8/1/05	$53,689.87	$53,689.87	1,550.60	$12,303.59	$1.78	24.21%	$34.63	$32.78
Average	$53,689.87	$53,689.87	1,550.60	$12,303.59	$1.78	24.21%	$34.63	$32.78
Total	$53,689.87	$53,689.87	1,550.60	$12,303.59	$1.78	24.21%	$34.63	$32.78

Average Hourly Wage
To find your average hourly rate run the profitability report for your last full week of business. Then use The following equation to find your average hourly wage.

To Find Your Average Hourly Rate

Labor Cost ÷ Labor Hours = Average Hourly Rate (Does not include Salary)

Total Salaried Dollars
To find your total salaried dollars first run the report for your last full week of business, and check the *Include Salary Hours and Cost* checkbox from the profitability report options screen. Write down the dollar amount from the *Labor Cost* field. Next, run the report again, but this time make sure to uncheck the *Include Salary Hours and Cost* checkbox so your profitability report is not show salaried dollars. Use the following equation to find your total salaried dollars.

To Find Your Salaried Dollar Amount

Labor Cost (Week Period w/ Salary) − Labor Cost (Week Period w/o Salary) = Salaried Dollar's

Other Reports Available from Profitability Report

Definition: The *Profitability Report* also allows access to several other reports that are available by clicking on the underlined links in the report. These reports are as follows, and will be each briefly touched on.

> Business Unit Daily Report
> Weekly Trend Report
> Business Unit Category Sales Report
> Business Unit Destination Sales Report

Navigation: Each of the above listed reports are accessible by clicking on the underlined links in the *Profitability Report*.

Week Begins	Gross Sales	Net Reductions	Refunds	Net Sales	Sales Count	Total Trans Count	Avg Gross Sale	Avg Sale After Net Reductions	Avg Net Sale
8/1/05	$53,689.87	$2,766.46	$100.90	$50,822.51	6,893	6,909	$7.79	$7.39	$7.36
Average	$53,689.87	$2,766.46	$100.90	$50,822.51	6,893	6,909	$7.79	$7.39	$7.36
Total	$53,689.87	$2,766.46	$100.90	$50,822.51	6,893	6,909	$7.79	$7.39	$7.36

Week Begins	Category Sales	Destination Sales	Labor Hours	Labor Cost	Labor Cost / Trans	Labor Cost % Net Sales	Gross Sales / Labor Hour	Net Sales / Labor Hour
8/1/05	$53,689.87	$53,689.87	1,190.12	$9,255.27	$1.34	18.21%	$45.11	$42.70
Average	$53,689.87	$53,689.87	1,190.12	$9,255.27	$1.34	18.21%	$45.11	$42.70
Total	$53,689.87	$53,689.87	1,190.12	$9,255.27	$1.34	18.21%	$45.11	$42.70

Business Unit Report: This report will allow you to drill down further into the date range ran for the profitability report. For example, if you were to run the report for a month period, clicking on the underlined link would allow you to view the profitability report with all of the weeks in the month broke out. From the week break out you could then click on the link again to view the daily break out for that week.

Trend Report: This report will allow you to view a comparison of the current sales and labor information to the last 5 time periods of the current report. For example, if you were currently view the *Profitability Report* for a week period, the *Trend Report* would show you a comparison of this week's information against the last 5-week periods. Use this report to get a quick overview of how your labor is fluctuating from week to week.

Business Unit Category Sales Report: This report will allow you to view a comparison of the current category sales information to a period in the past. For example, if you ran the *Profitability Report* for a week period you would have comparison information for the current week, and the week before. Use this report to help gauge the results from any local or system wide promotions that may be currently running.

Business Unit Destination Sales Report: This report will allow you to view a comparison of the breakdown of sales for your restaurant by destination. You can use this report to view key figures such as total percentage of Drive Thru sales. Use this report to help identify possible areas of growth in your restaurant by increasing your Call-Ins, and Drive-Thru sales.

Loss Prevention Report

Navigation: Loss Prevention Reports ➜ Loss Prevention Report

Description: This report allows you view many of the key loss prevention figures for your restaurant. Use this report to look for opportunities to improve cash handling and management, as well as increase your restaurants bottom line.

Date Range: This report can be run for the following date ranges: **Day, Week, Month, Year, Period**

Application: This report is very useful in trying to identify cash shortages, as well as possible training issues when using the POS. The following list will help identify key fields in this report, and possible actions to take if any of the numbers seem out of the ordinary.

- **Refunds –** Your refund amount for your restaurant should be watched closely. Many restaurants have developed the practice of signing all refund slips, and then later reconciling the slips to the refund amount contained in this report.

- **Item Deletions Count –** Items deletions are items that are rang up on the POS, and then deleted before the order is tendered out. A high amount of *Item Deletions* may be an indicator of employee training issues.

- **Net Coupons –** This is the total value of coupons rang up for the given period of the report. If you feel that this number is out of the ordinary for your restaurant, run the *Coupon Report* for the same time period for a more granular view of your coupons. Coupons should be tightly monitored as they are an area that can be impacted by employee abuse.

🗀 The majority of the globally assigned coupons (coupons not made at the restaurant level) have both a manager swipe required, and manager swipe not required coupons. These coupons can be set up by contact a member of the IS Support team.

- **Net Discounts** – This is the total value of discounts rang up for the given period of the report.. If you feel that this number is out of the ordinary for your restaurant, run the *Discount Report* for the same time period for a more granular view of your discounts.

Use the *Loss Prevention Report* as starting point for locating potential problem areas in your restaurant. Once you have identified the area you would like to investigate further (coupons, discounts, refunds) use the specific report to have a more granular break down of the item. Once you have located the day, in which the item you are investigating has occurred you can use the *Electronic Journal* to pinpoint the item to a specific transaction.

Loss Prevention Reports
- Cashier Over Short Report
- Coupon and Discount Summary Report
- Coupon Report
- Refund Report
- **Loss Prevention Report**
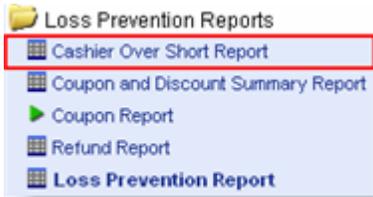
Cashier Over/Short Report
Navigation: Loss Prevention Reports ➜ Cashier Over Short Report

Description: This report allows you to view overages and shortages for each cash drawer per shift. Use this report to look for opportunities to improve cash handling and management.

Date Range: This report can be run for the following date ranges: **Day, Week, Month, Year, Period**

Application: This report is very useful in trying to identify cash shortages, as well as possible training issues when using the POS. Use this report when attempting to pinpoint cash issues to a single drawer per shift. If you are having cash issues this report is most effective when team members are assigned and accountable for one singe cash drawer.

	My Searches ▼		Add Comment	PDF Report	Options

Cashier Over Short Report

Business Unit:
Start Business Date: 12/29/2006
End Business Date: 12/29/2006
Report Time: 12/31/2006 01:46:52

Employee	Business Date	Shift	Over / Short Amount
zzReg, One			
	12/29/2006	1	$0.00
	12/29/2006	2	($0.04)
Subtotal			($0.04)
Total			($0.04)

Sales Mix Report

Sales Reports
- Quarter Hour Sales Activity Report
- Day Part Category Sales Report
- Hourly Sales Activity Report
- **Sales Mix Report**
- Sales Mix By Day Part
- Weekly Operations Summary Report
- Sales Mix by Retail Item Group

Navigation: Sales Reports ➜ Sales Mix Report

Description: This report allows you to view your total sales mix information. This information is broken down into specific item categories with columns for current retail price, number of items sold, and total percent of sales for each item.

Date Range: This report can be run for the following date ranges: **Day, Week, Month, Year, Period**

Application: This report is very useful for measuring the succesfulness of local and system wide promotions. Use the Sales Mix report regularly to find areas of potential improvement by monitoring your low food cost items.

My Searches ▼				Add Comment	PDF Report	Options

Sales Mix Report

Business Unit:

Start Business Date: 12/30/2006
End Business Date: 12/30/2006
Report Time: 12/31/2006 02:02:08

Item	Price	Items Sold	Sold Amount	% Sales	Item Reductions	Item Refunds	Item Net Sales
– Desserts							
– Concrete Mixers (autogenerated)							
– Concrete Mixers							
Concrete Mixers, Medium, Banana	$1.90	1	$1.90	0.03%	$0.00	$0.00	$1.90
Concrete Mixers, Medium, Cherry	$3.29	1	$3.29	0.05%	$0.00	$0.00	$3.29
Concrete Mixers, Medium, Crunch	$3.29	1	$3.29	0.05%	$0.00	$0.00	$3.29
Concrete Mixers, Medium, Heath	$3.29	1	$3.29	0.05%	$0.00	$0.00	$3.29
Concrete Mixers, Medium, Marshmallow	$3.29	1	$3.29	0.05%	$0.00	$0.00	$3.29
Concrete Mixers, Medium, Oreo	$3.29	4	$13.16	0.21%	$0.00	$0.00	$13.16
Concrete Mixers, Medium, Peanut Butter	$3.29	2	$6.58	0.10%	$0.00	$0.00	$6.58
Concrete Mixers, Medium, Raspberry	$3.29	3	$9.87	0.15%	$0.00	$0.00	$9.87
Concrete Mixers, Medium, Reese's PB Cup	$3.29	4	$13.16	0.21%	$0.00	$0.00	$13.16
Concrete Mixers, Medium, Reese's Pieces	$3.29	2	$6.58	0.10%	$0.00	$0.00	$6.58
Concrete Mixers, Medium, Snicker	$3.29	2	$6.58	0.10%	$0.00	$0.00	$6.58
Concrete Mixers, Medium, Strawberry	$3.29	1	$3.29	0.05%	$0.00	$0.00	$3.29

Frequently Asked Questions

I don't do two deposits a day; do I still need to do the midday workflow task?
If you do one deposit a day, please skip over the midday workflow task and complete the End of Day task. The midday workflow is not a required task.

What is a user role?
A user role is a login level assigned to an employee that determines what is available on their menu and what functions they have access to on Radiant Enterprise. The ones in use at Culver's are Owner, Restaurant Manager , Restaurant Manager w/o Salary View, Shift Manager, Store Manager, Team Member, and External Accounting/Payroll management. You can print a list of the user role menu by navigating to Workforce Management ➔ Humar Resources Reports ➔ Role Summary Report.

Is there a way to verify that the EOD/SOD was done on the register the night before?
The opening manager should check this in the morning on the POS by going to Store Management➔Site Operations➔ Daily Processing. The boxes should read: top- current day, bottom-tomorrow if the EOD/SOD was preformed the night before.

Is there a report that lists item prices?
POS Management➔Retail Item Price Report will list all items and their prices. POS Management ➔ Retail Item Report will list items by category and includes prices and

taxability information. The Sales Mix Report includes prices, but doesn't include items that haven't been sold during that report range.

What reports should I run to verify payroll before I send it to my accountant?
Pay Summary Report. You can run a Pay Summary report as part of the End of Pay Period workflow or by navigating to Workforce Management ➜ Pay Summary Report.

Where can I find my non-taxable sales figure?
Run a Daily Summary Report.

I'm a few days behind in doing the back office workflows, should I still do the Mid-day workflow?
No. The Mid-day workflow is optional and should not be performed unless the day that you are working on is the current business day.

Sometimes a receipt doesn't print when I'm doing a refund, why is that?
A receipt will print when doing a refund by transaction number, but will <u>not</u> print when refunding items individually. You will have to print this receipt manually by pressing the Print Receipt button

Contact Information

Retail Data Systems (RDS)
Call for help with problems dealing with hardware (i.e. printers, POS, monitors, etc.), tax rate changes, price changes, general configuration questions.

262-896-2600
800-779-7052

Concord EFS
Call with merchant account issues such as terminal support, billing, and chargebacks. This customer service and support resource directs your inquiry to the appropriate department

1-800-238-7675

For account setup call Chris Bledsoe at 1-800-289-7277 x 66152

CfSi IS support team
Call for assistance in dealing with problems related to coupon setup, product rollout, enhancement requests and cash management.

Carlton, IS Director, 608-644-2125
Greg, IS Manager, 608-644-2106
Chris, IS Technician, 608-644-2149
Dan, IS Technician, 608-644-2147
Jeff, IS Technician, 608-644-2124