SECTION 11

Advanced Brand Operations

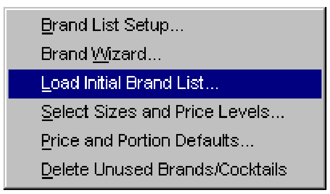
This section provides help with the following tasks:

Load Initial Brand List

Perform this task to load Berg's list of brands to your computer. You can select which product types of the brand list to load. Any brands already in your brand list are skipped by this process—they're not reloaded and no settings are changed. Each brand in the Berg list has default prices and portions which have the "Standard" category name. If you want to change the default prices and portions for one or more product types before you load Berg's list, see *Price and Portion Defaults* in this section. (You don't need to load the brand list if you already loaded it with the Brand Wizard.)

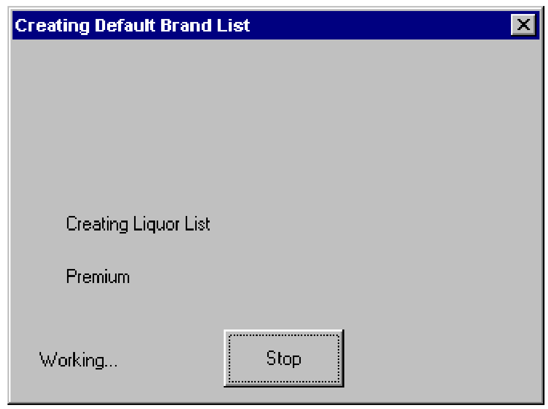
■ To load the initial brand list:

1. Run **Manager**.



2. Pull down the **Pouring** menu and point to **Brand Operations**. Click **Load Initial Brand List...**.

3. Select the product type(s) you want to load.
4. Select a **Container** for each product type.
5. Click **OK** to load the list.



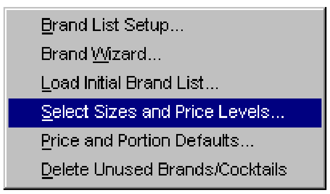
Wait while the brand list for the selected product type(s) is loaded.

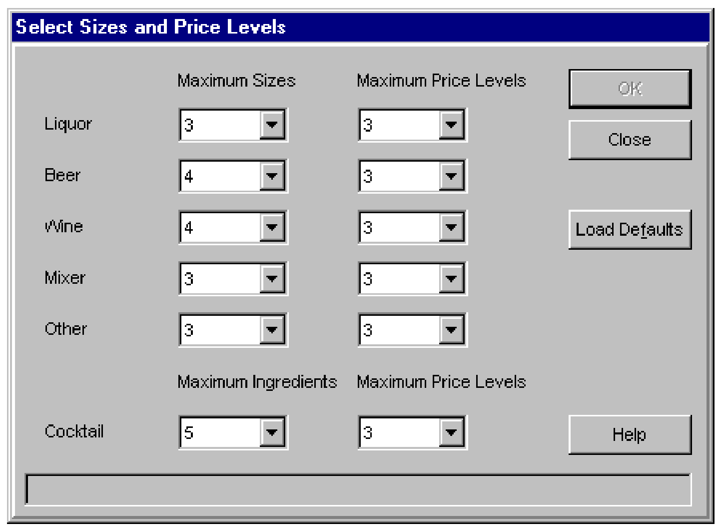
Select Sizes and Price Levels

This task lets you modify the number of sizes and price levels for a particular product type. This is useful if you never use all the sizes and price levels available or if you want to increase the sizes and price levels available because you've added a 1544 Infinity ECU or an All-Bottle ID dispenser to your system. (You don't need to perform this task if you already set the number of sizes and price levels with the Brand Wizard.)

■ To select sizes and price levels:

1. Run **Manager**.
2. Pull down the **Pouring** menu and point to **Brand Operations**. Click **Select Sizes and Price Levels...**.





3. Select the maximum number of portion sizes you want for each product type. (For the cocktail product type, select the maximum number of ingredients you want for a cocktail recipe.)

   You're not setting any portion sizes—you're selecting the number of different portion sizes you'll need for each product type.

4. Select the maximum number of price levels you want for each product type.

   You're not setting specific price levels—you're selecting the number of price levels you'll need.

5. Click **OK** to save the maximum sizes and price levels and exit the screen.

Load Defaults

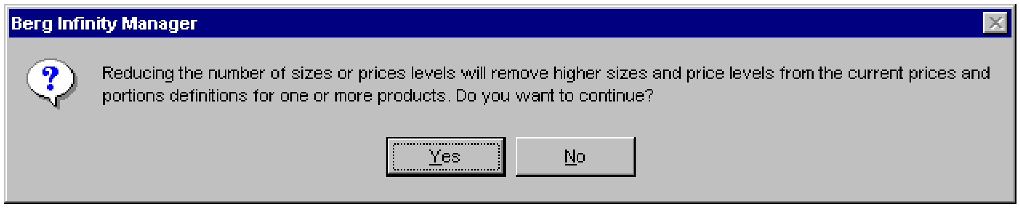
If you want to use Berg's default number of sizes and price levels, click Load Defaults.

The Berg default sizes are 3 for Liquor, Wine and Mixers, 4 for Beer and 5 ingredients for Cocktails. The Berg default price levels are 3 for all product types.

Price Levels

Price levels are optional tiers of prices and portions that can be defined to accommodate various needs. Some owners don't use price levels; others use them for switching between happy hour, regular and entertainment pricing; still others use them to track shift sales.

6. If you reduce the number of portion sizes and price levels, a message warns you the highest portion sizes and price levels are the ones that will be eliminated.



Click **Yes** to continue (and remove the higher sizes and price levels) or **No** to abort the process.

OR

If you increase the number of portion sizes and price levels, a message reminds you that no prices and portions are affected by the change. Just remember to enter prices and portion sizes for the new sizes and price levels—they aren't automatically filled.

Click **OK** to continue the process.

Notes

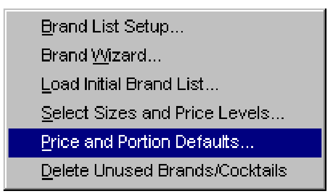
- You can choose the number of portion sizes and price levels you want, but you can't specify their designations. For example, if you choose 2 price levels they will be A and B. If you choose 2 portion sizes, they will be 1 and 2. The higher sizes and price levels are always the ones eliminated.
- The number of portion sizes and price levels for Test Pour can't be changed.
- If you eliminate previously defined higher prices and portions, the changes are sent to the ECUs.

Price and Portion Defaults

Perform this task at any time to modify the default prices and portions for any product type. Defaults are base prices and portions which are automatically entered for each brand of a product type when the brand is added to the brand list. (They're also used when you press the **Load Defaults** button on the **Modify Prices and Portions** screen.) Berg's default prices and portions are used if you don't set your own using this procedure or the Brand Wizard. (You don't need to perform this task if you've already set your price and portion defaults with the Brand Wizard.)

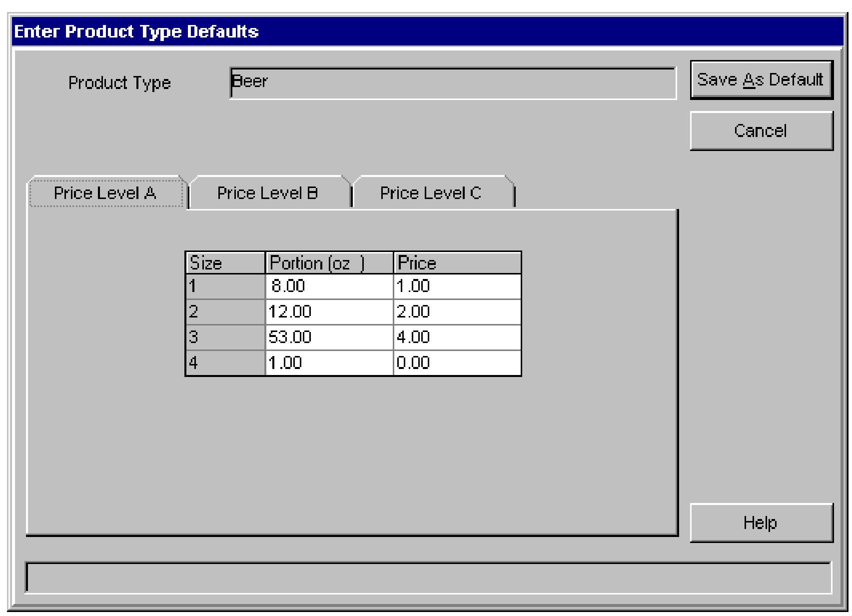
■ To enter price and portion defaults:

1. Run **Manager**.



2. Pull down the **Pouring** menu and point to **Brand Operations**. Click **Price and Portion Defaults...**.

3. Select the **Product Type** with price and portion defaults you want to change.

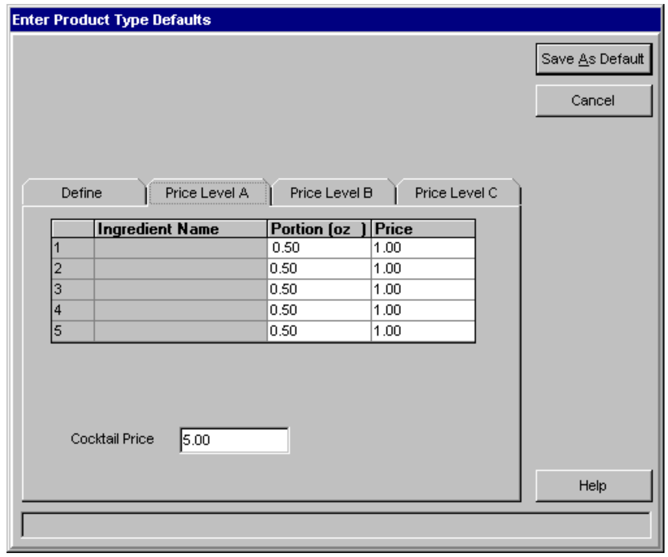


You don't need to type a decimal if you're entering a whole number, e.g., type 6 for 6.00 oz, or 2 for $2.00.

4. Click a **Price Level** tab.

5. Type the correct **Portion** and **Price** for each **Size** listed on the tab. **Sizes 1-3** correspond to small, regular and large

portions for All-Bottle and Laser dispensers. **Sizes 1-8** correspond to the eight possible sizes on TAP 1 taps if alternate sizes are enabled. **Sizes 1-4** correspond to the four possible portions for 1544 Infinity dispensers.



Cocktail Defaults

- Even though all your cocktail recipes are different, you may have several recipes with a 1/2 oz ingredient and a 1 oz ingredient. By defining default portions and prices for ingredients, you can save time re-entering the same numbers in each recipe.
- When you create a cocktail recipe (see Cocktail Prices and Portions), any unused default prices and portions are removed from the recipe, so it's okay to define defaults here that some cocktails won't use.

Note that for cocktails you're entering default portion sizes and prices for each **Ingredient** in the cocktail in addition to a default **Cocktail Price**.

6. Repeat steps 4 and 5 for any **Price Level** tab that has prices and/or portions you want to change.
7. Click **Save As Default** to save the prices and portions you just entered (on all tabs) as the default prices and portions for this product type.
8. Repeat steps 3 through 7 to enter default prices and portions for other product types.
9. Click **Close** to exit the **Price and Portion Defaults** screen.

Notes

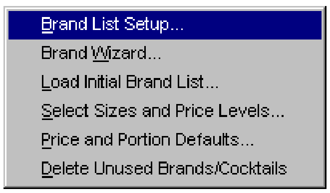
- ❑ You can also set default prices and portions for a product type when you enter a brand's prices and portions and use the **Save as Default** button. See *Brand Prices and Portions* in this section.
- ❑ If you want to enter prices and portions other than the defaults for a particular brand see *Brand Prices and Portions* in this section.
- ❑ Changing price and portion defaults does not affect any existing brand prices and portions.

Switch Product Type

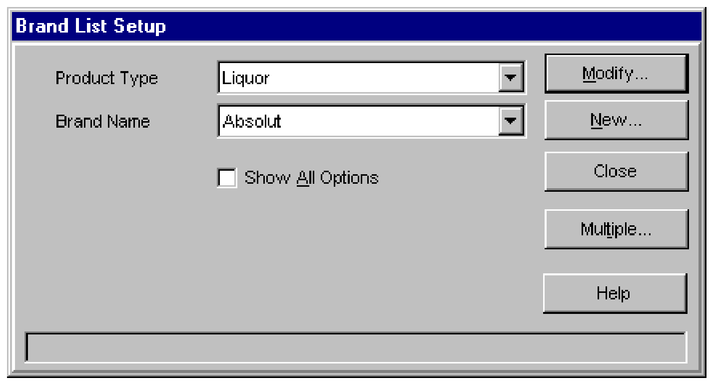
You can change the product type designation of a brand when you modify a brand's setup. Switching a brand's product type is useful if a brand's product type was defined incorrectly and you want to switch to the correct product type.

To switch a product type:

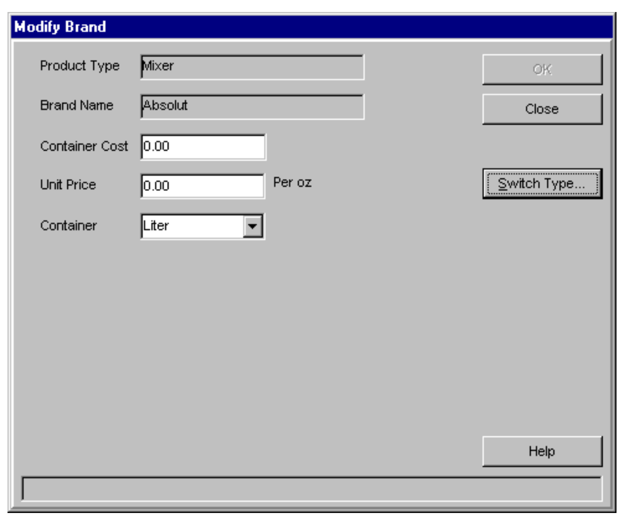
1. Run **Manager**.



2. Pull down the **Pouring** menu and point to **Brand Operations**. Click **Brand List Setup...**.



3. Select the **Product Type**.
4. Select the **Brand Name**.
5. Click **Modify...**.



6. Click **Switch Type...**.

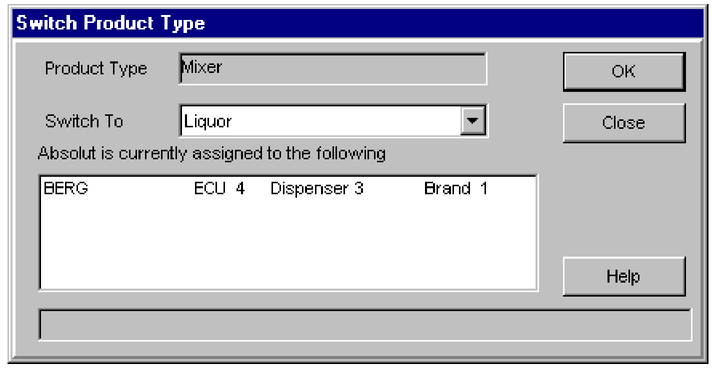
Product Types

Product types are categories Infinity uses to organize the brand list.

- Beer can only be assigned to TAP 1 dispensers.
- Cocktails can only be assigned to Laser dispensers.
- Liquor can be assigned to Laser or All-Bottle dispensers.
- Mixers can be assigned to any dispenser.
- Other can be assigned to any dispenser.
- Wine can be assigned to any dispenser.

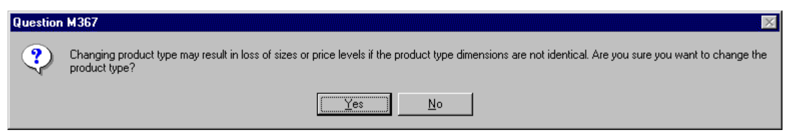
Switching Restrictions

- Beer can be switched to the Mixer, Wine or Other product type.
- Cocktails can't be switched to any other product type.
- Liquor can be switched to the Wine, Mixer or Other product type.
- Mixers can be switched to the Liquor, Wine, Beer or Other product type.
- Other can be switched to the Liquor, Beer, Mixer or Other product type.
- Wine can be switched to the Liquor, Beer, Mixer or Other product type.
- If a brand is assigned to dispensers, the switch is restricted to the product types allowed on those dispensers.

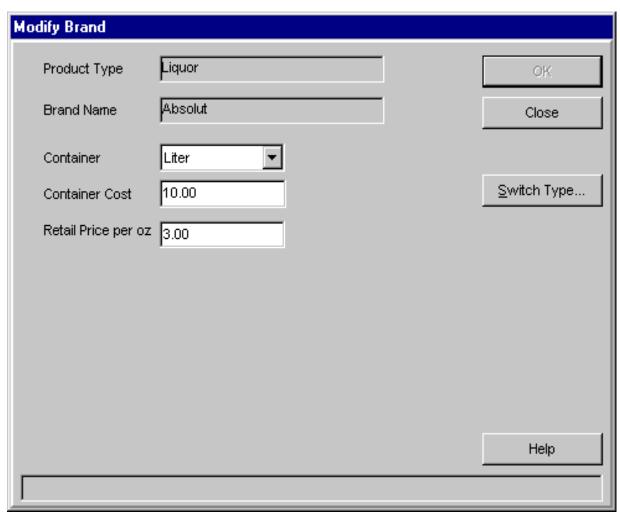


7. Select the product type you want to **Switch To**.
8. Click **OK** to proceed or click **Close** to exit without saving any changes.

   A message reminds you that a change in product type may result in a loss of higher sizes or price levels if the product types do not have the same number of sizes and price levels.



9. Click **Yes** to complete the product type switch or click **No** to cancel the switch.

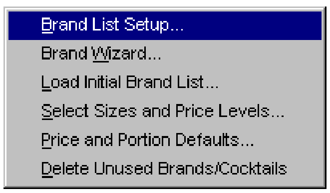


10. Click **OK** to save your entries and exit the **Modify Brand** screen.
11. Click **Close** to exit the **Brand List Setup** screen.

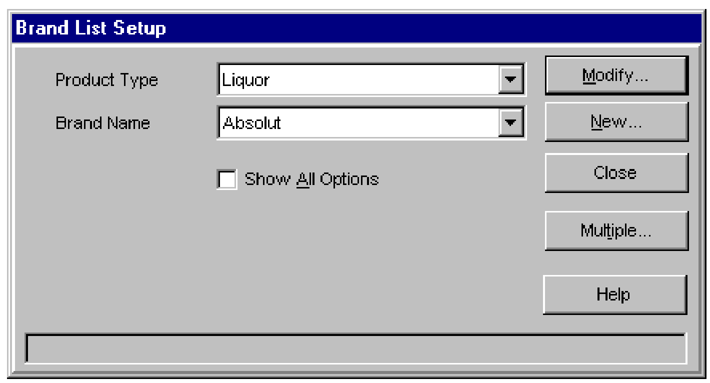
Rename a Brand or Cocktail

You can easily rename any brand or cocktail in the brand list. The name change does not change the other setup features of the brand or cocktail (e.g. cost, cocktail ingredients, prices and portions). It just replaces the old name with a new one everywhere it is used.

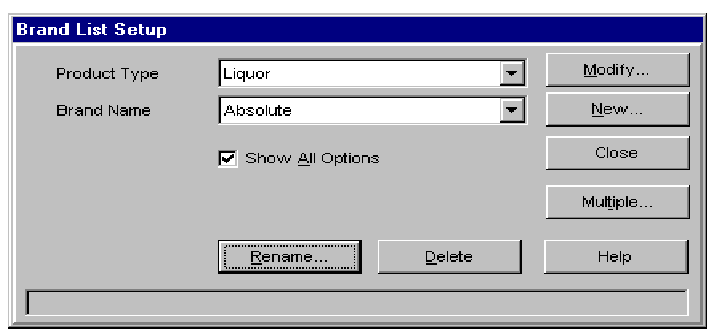
■ To rename a brand or cocktail:



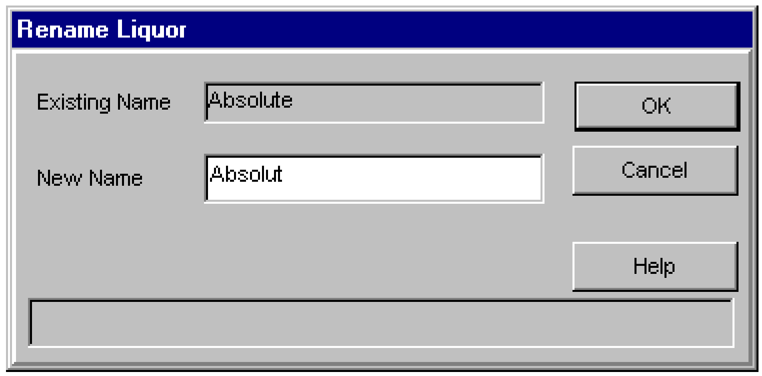
1. Run **Manager**.
2. Pull down the **Pouring** menu and point to **Brand Operations**. Click **Brand List Setup...**.



3. Select the **Product Type**.
4. Select the **Brand Name**.
5. Select **Show All Options**.



6. Click **Rename...**.



7. Type in the brand or cocktail's **New Name**. It can be up to 19 characters.

8. Click **OK** to save your entry and exit the screen. Click **Cancel** to exit the screen without saving any changes.

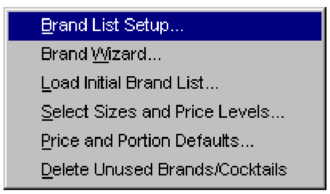
9. Click **Close** to exit the **Brand List Setup** screen.

Delete a Brand or Cocktail

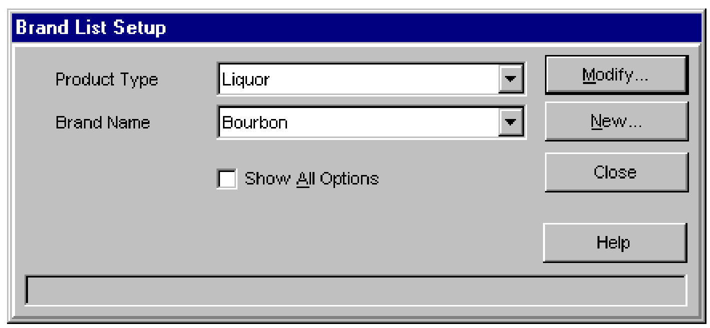
Use this feature to remove the name of a brand or cocktail from the brand list. The brand or cocktail's prices and portions are deleted at the same time. If you delete a brand from the list that is already assigned to dispensers, all of the assignments are lost as well as any sales data for the brand. (To preserve the sales data, see Archive and Clear Sales (Z) in the *Reports* section.) You can't delete a brand that is an ingredient in a cocktail recipe assigned to Laser dispensers. (To modify cocktail recipes see Cocktail Prices and Portions in this section.)

■ To delete a brand or cocktail:

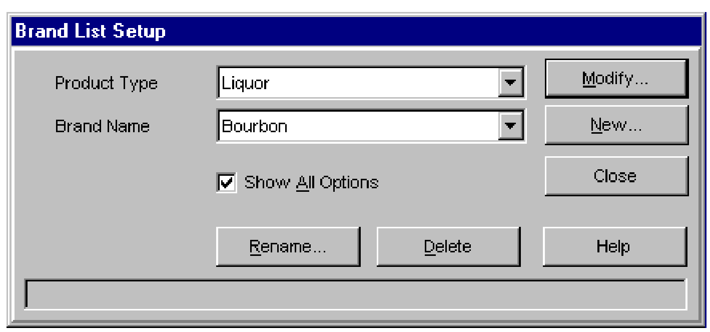
1. Run **Manager**.



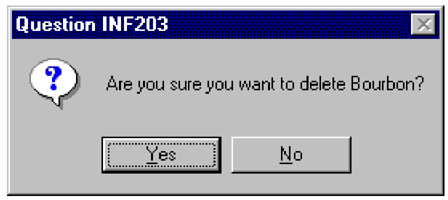
2. Pull down the **Pouring** menu and point to **Brand Operations**. Click **Brand List Setup...**.



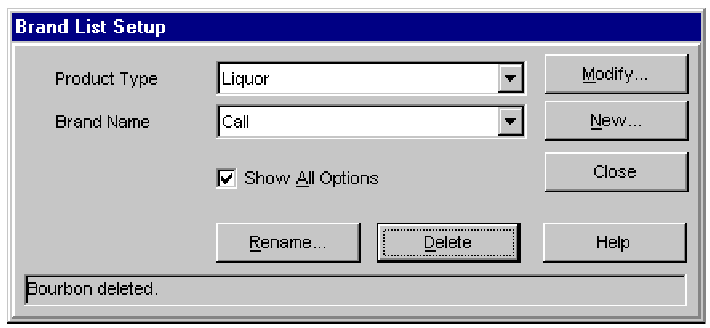
3. Select the **Product Type**.
4. Select the **Brand Name**.



5. Select **Show All Options**.
6. Click **Delete**.



7. Click **Yes** to confirm the deletion or click **No** to cancel the deletion.



8. Click **Close** to exit the **Brand List Setup** screen.

Notes

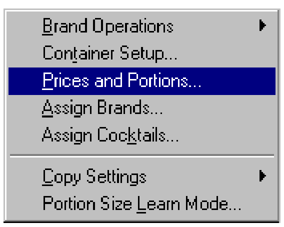
- ❑ If you want to quickly delete all unused brands and cocktails from the brand list see *Delete Unused Brands and Cocktails* in this section.
- ❑ **Assigned Brand** popup screen: If you're deleting a brand already assigned to dispensers, a list of dispenser assignments appears. Click **Continue...** to unassign the brand from the dispenser(s) and delete it from the list.
- ❑ **Required Ingredient** popup screen: If you attempt to delete a brand that is part of a cocktail recipe, a list of the affected cocktail recipes appears. Click **Cancel** to exit the screen and abort the deletion process. You can't delete the brand unless it is removed from all cocktail recipes.

Assign PLUs to Brands and Cocktails

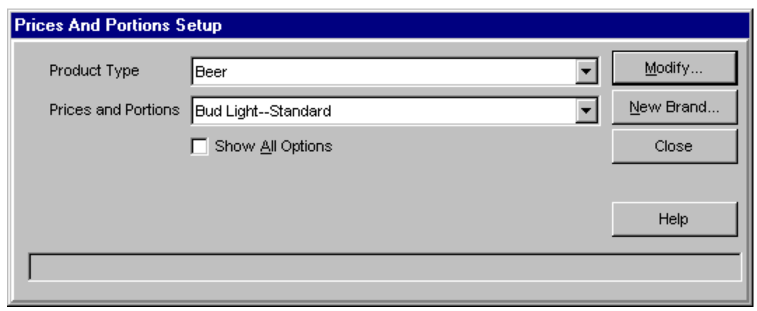
To accurately compare data from **Infinity** and a sales terminal on a Reconciliation report or to use **Interface**, you need to assign PLUs to brands and cocktails in **Infinity** that match the PLU assignments at the sales terminal. Get the list of PLUs from the sales terminal and match them with the correct brands, sizes and price levels in **Infinity. You** can assign PLUs at the same time you enter a brand's prices and portions or you can go back and enter or change them at any time. If you use the Reconciliation report, you may need to create PLU "recipes" in **Infinity** for some of the PLUs used at the sales terminal. See *About PLU Recipes* and *Create and Assign a PLU Recipe* in the *Reconciliation and Variance Reports* section.

■ To assign PLUs to brands and cocktails:

1. Run **Manager**.



2. Pull down the **Pouring** menu and click **Prices and Portions...**.



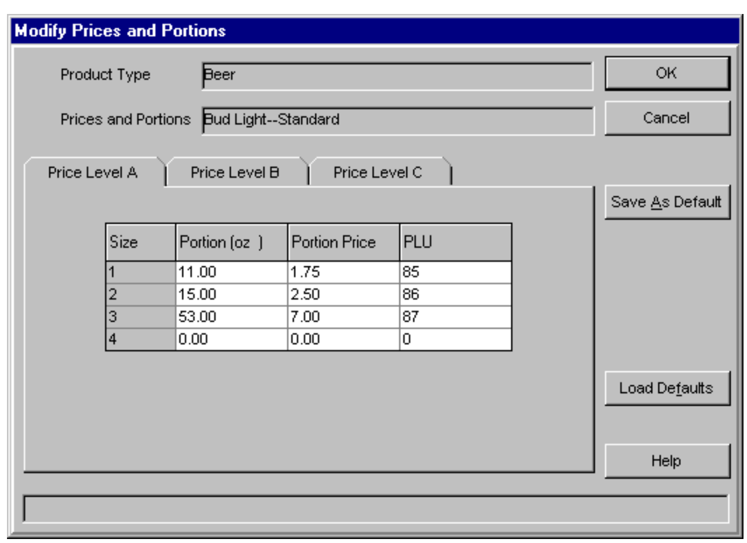
PLU Column

The PLU column is shown under any of the following conditions:

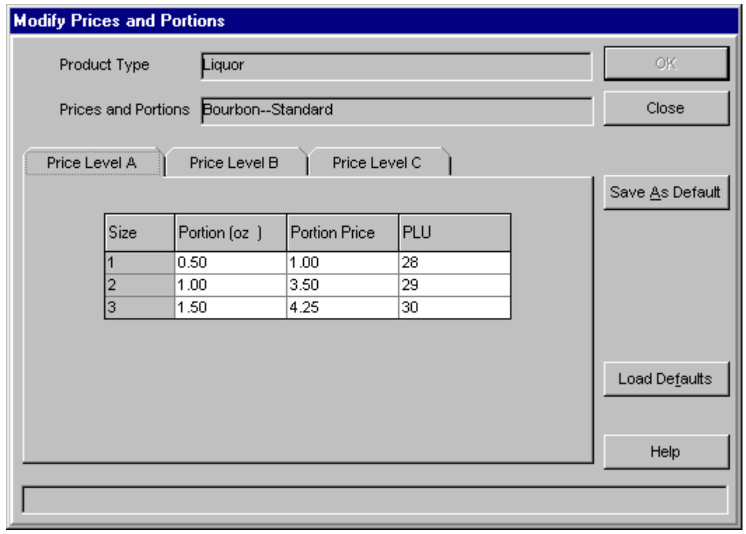
- You've installed Interface software.
- You've enabled the Reconciliation report feature.
- You've selected Show PLU on the Preferences screen.

3. Select the **Product Type**.
4. Select the brand's **Prices and Portions** you want to give a PLU.

Beer prices, portions and PLUs



Liquor, Wine and Mixer prices, portions and PLUs



PLUs

- Infinity accepts numbers to 999,999,999 as a PLU.
- PLUs to be used with Interface can be up to 65535.
- Depending on the sales terminal, the PLU may be the same for every size at a certain price level or it may be different.

5. Click **Modify...**.
6. Click a **Price Level** tab that has PLUs you want to enter or change.
7. Type the correct **PLU** for each **Size** listed on the tab. **Sizes 1-3** correspond to the three possible portion sizes (small, regular and large) for All-Bottle 7 and Laser dispensers. **Sizes 1-8** correspond to the eight possible sizes on TAP 1 taps if alternate sizes are enabled. (If you don't use alternate sizes don't worry about sizes 5-8.) **Sizes 1-4** correspond to the four possible portions (small, regular, large and special) for 1544 Infinity ECU dispensers.
8. Repeat steps 6 and 7 for any **Price Level** tab that needs PLUs.
9. Click **OK** to save your entries on all tabs. Click **Cancel** to exit the screen without saving.
10. Repeat steps 3-9 for every brand that needs PLUs.
11. Click **Close** to exit the **Prices and Portions Setup** screen.

Defaults

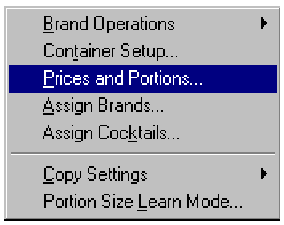
- There are no factory default PLUs.
- If you click Save As Default after you've entered prices, portions and PLUs, only the prices and portions on all tabs become the defaults for that product type. PLUs are not saved as defaults.

Rename a Price Portion Category

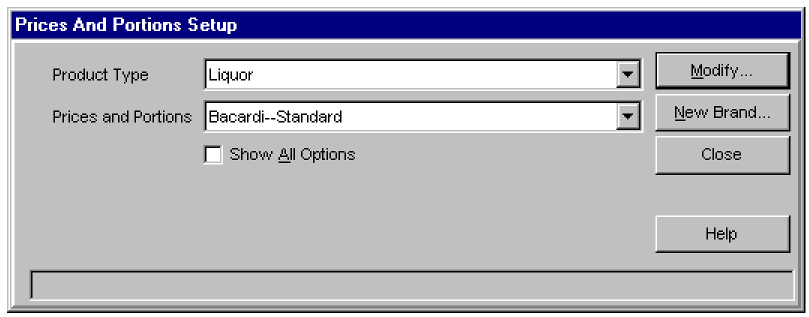
You can rename a category of prices and portions if you need to. ("Standard" is an example of a price/portion category.) Renaming a price/portion category for a single brand changes the category name for all brands using that category.

■ To rename a price portion category:

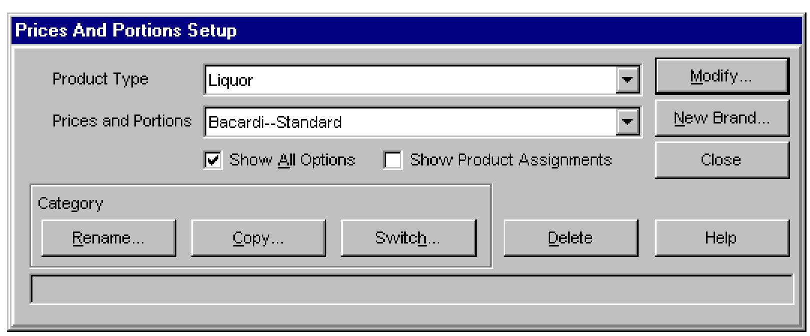
1. Run **Manager**.



2. Pull down the **Pouring** menu and click **Prices and Portions...**.



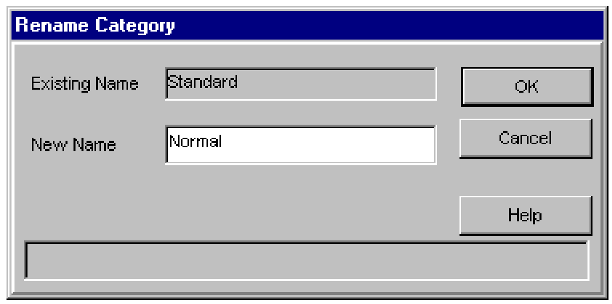
3. Select the **Product Type**.
4. Select the brand's **Prices and Portions** you want to rename.
5. Select **Show All Options**.



6. Click **Rename...**.

Show Product Assignments

Check Show Product Assignments to see which dispensers pour this brand.



7. Type the **New Name** for the prices and portions category.
8. Click **OK** to save the new name or **Cancel** to exit without saving.
9. Click **Close** to exit the **Prices and Portions Setup** screen.

Note

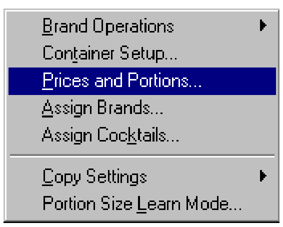
❑ Renaming a price/portion category does not create new prices and portions. If you want to create a new category of prices and portions, see *Create a New Price Portion Category* in this section.

Create a New Price Portion Category

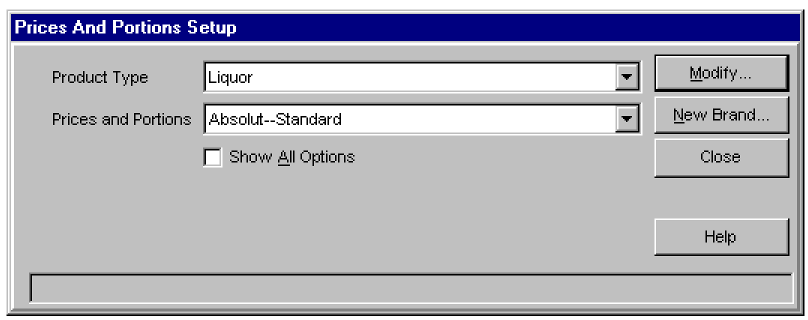
You can define additional price/portion categories for a brand or cocktail if necessary. If you do not have any more price or portion differences than you have price levels, it may be easier to just use price levels than to create additional categories. You can create as many new price/portion categories as you need. Each new category of prices and portions includes a new set of price levels. The prices and portions are distinguished from each other by the names you give them, for example, Absolut--Standard, Absolut--Restaurant, Absolut--Dancing. You perform this task for each brand individually.

■ **To create a new price portion category:**

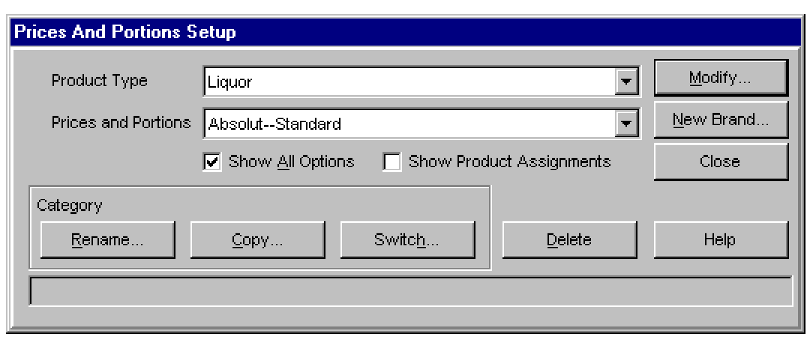
1. Run **Manager**.



2. Pull down the **Pouring** menu and click **Prices and Portions...**.



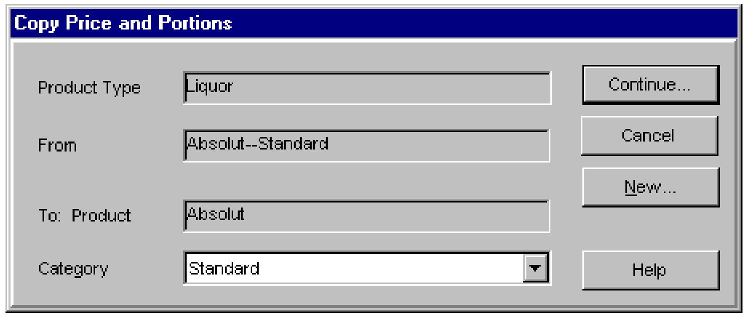
3. Select the **Product Type**.
4. Select the brand's **Prices and Portions** on which to base the new prices and portions.
5. Select **Show All Options**.



6. Click **Copy...**. (You are making a copy of the displayed prices and portions so you can change them.)

Show Product Assignments

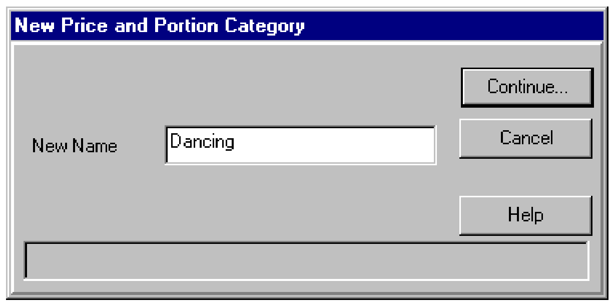
Check Show Product Assignments to see which dispensers pour this brand.



7. Select an existing **Category** name and click **Continue...**. Proceed with step 11.

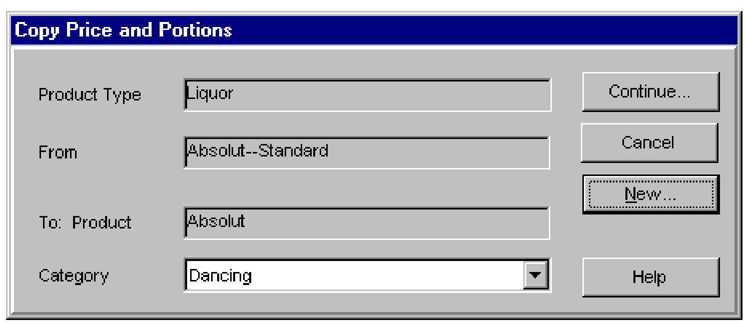
   OR

   Click **New...** to create a new category name.



8. Type the **New Name** for your prices and portions category. Do not type the name of the brand. (For example, type *Dancing* not *Absolut--Dancing*.)

9. Click **Continue...**.



10. Click **Continue...** to enter prices and portions under the new name you just entered or click **Cancel** to exit without saving the new name you entered.

11. Follow the steps outlined in *Brand Prices and Portions* in this section to enter the correct prices and portions.

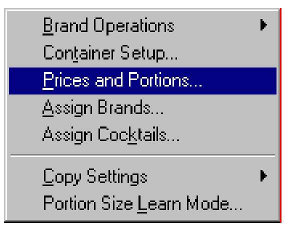
12. Click **Close** to exit the **Prices and Portions Setup** screen.

Switch a Price Portion Category

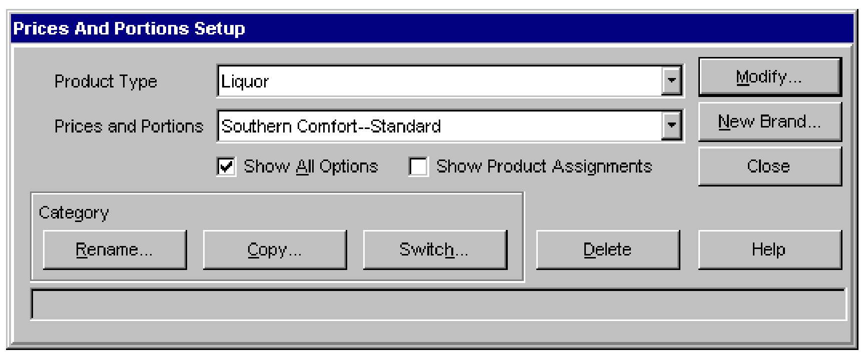
Once you've created additional price portion categories, you can use this feature to quickly switch the price portion category of all brands that qualify for the switch. (Note that you can also make pricing changes with price levels.) For example, if you create a new price portion category for an Oktoberfest promotion, you can easily switch your brands to pour at Oktoberfest prices. The brands to be switched must have an Oktoberfest category defined. (Any brands without an Oktoberfest category do not receive the switch.) When the promotion ends, you can switch from Oktoberfest back to any other price portion category you've defined.

■ To switch a price portion category:

1. Run **Manager**.



2. Pull down the **Pouring** menu and click **Prices and Portions...**.



3. Select the **Product Type**.

Show Product Assignments

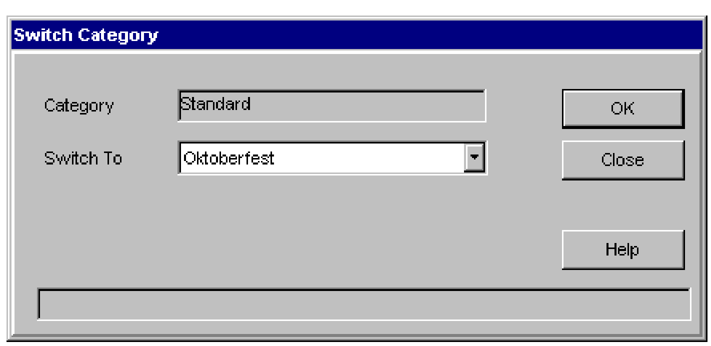
Check Show Product Assignments to see which dispensers pour this brand.

4. Select a brand's **Prices and Portions** you want to switch.

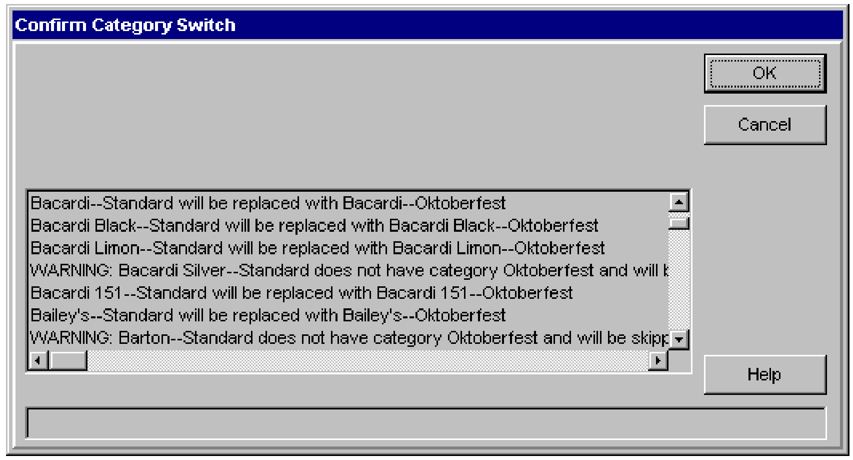
   You're selecting the brand and also the category name. (The switch is performed for every assigned brand in your list that has the category name you select and also the new category name you're switching to.) You must select a brand that has more than one price portion category defined.

5. Select **Show All Options**.

6. Click **Switch...**.

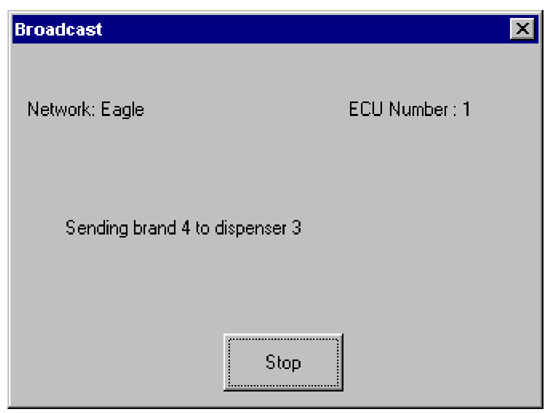


7. Select the category you want to switch to.
8. Click **OK**.



9. Click **OK** after reading the confirmation message or click **Cancel** to abort the switch process.

   The confirmation message tells you which brands will receive the switch and which will not.



> Schedule a Switch
>
> You can automatically switch price portion categories at specific times by including the switch in a schedule. See *Create a Time Schedule* in the *Schedules* section.

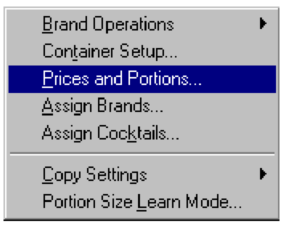
10. Wait while the switch is broadcast to the ECU(s).
11. Click **Close** to exit the **Prices and Portions Setup** screen.

Notes

- ❑ Switching a price portion category doesn't delete the old category.
- ❑ If a cocktail qualifies for the switch with the correct category name, but doesn't have the same ingredient list for the old and new categories, it won't be switched.
- ❑ Switching occurs for all brands that qualify in your system.

Delete a Brand or Cocktail's Prices and Portions

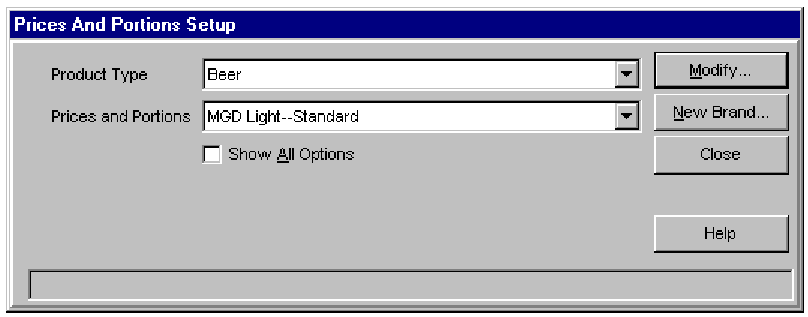
You cannot delete a brand or cocktail's prices and portions if they are currently assigned to a dispenser. Deleting a category of prices and portions deletes the brand from the brand list if you haven't previously defined another category of prices and portions for the brand.



■ **To delete a brand or cocktail's prices and portions:**

1. Run **Manager**.

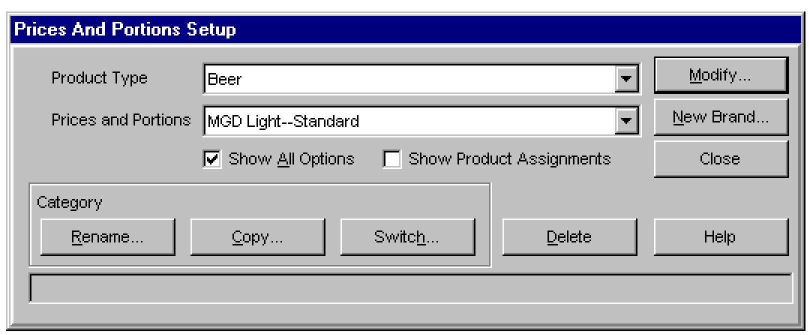
2. Pull down the **Pouring** menu and click **Prices and Portions...**.



3. Select the **Product Type**.

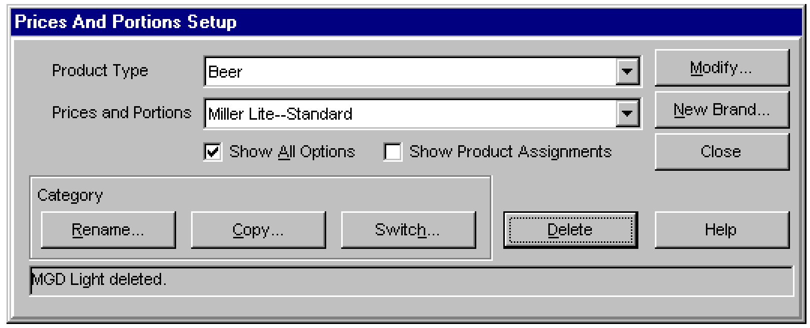
4. Select the **Brand Name**.

5. Select **Show All Options**.



6. Click **Delete**.

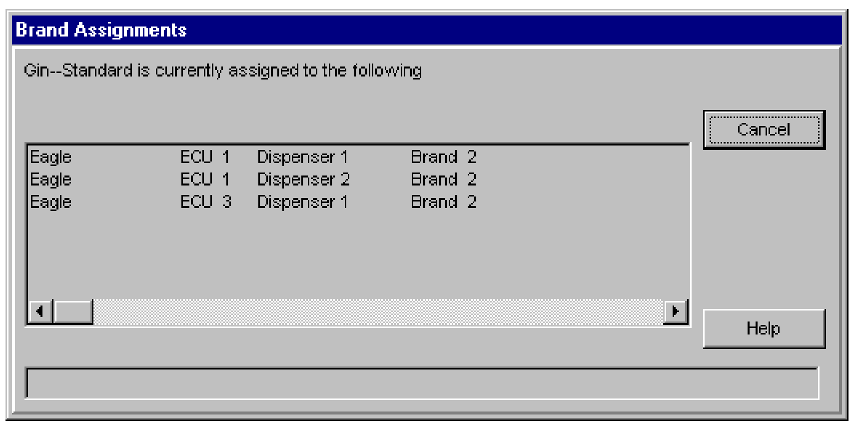
7. Click **Yes** to confirm the deletion or click **No** to cancel the deletion.



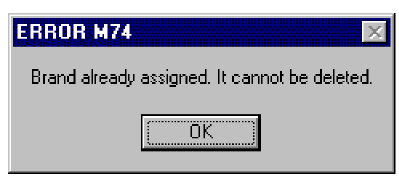
8. Click **Close** to exit the **Prices and Portions Setup** screen.

Note

- ❑ If you try to delete a brand or cocktail's prices and portions that are already assigned to a dispenser, a list appears showing the dispenser assignments.



Click **Cancel** after viewing the list.



Click **OK** after viewing the message.

- ❑ If you want to quickly delete all unused brands and cocktails and their prices and portions, see *Delete Unused Brands and Cocktails* in this section.

SECTION 12

Calibration

Calibration ensures the amount of beverage poured by a dispenser matches the amount recorded by the ECU. Unless you calibrate your dispensers they can't be expected to pour accurate portion sizes. After you've assigned brands to each dispenser, you must calibrate the dispensers by checking the accuracy of calibration pours and making any necessary adjustments using **Infinity** software. If you are converting a stand-alone TAP 1 system to work with **Infinity**, enter the meter counts and flow rates (listed on a TAP 1 configuration report) before performing calibration. *See Initialize Calibration Values* in this section. This section provides help with the following tasks:

What is Calibration?

Calibration is the process of checking and adjusting the amount of beverage poured from each **Infinity** dispenser. Using the calibration process, you tell **Infinity** how long to pour individual brands at a specific dispenser to achieve the desired portion size. If you are unsure about the need for calibration or the process involved in calibrating an **Infinity** system, the following tips may be helpful.

Why do I have to calibrate? Isn't the system calibrated at the factory?

It's true that each **Infinity** dispenser is set up with default calibration values. However, these values are identical for every All-Bottle pourer code and Laser gun button. (TAP 1 taps have default flow meter counts or flow rates.) Since each system is unique as to brands poured, lengths of tubing, location of equipment, etc., the default calibration values may give unpredictable results. The actual flow rates of different brands can vary significantly. (A two second pour of Schnapps yields less volume than a two second pour of vodka.) Slight variations in lengths of tubing runs or tubing diameters also affect the accuracy of pours. The *only* way to make sure a system pours accurately is to calibrate each dispenser using the brands assigned to the dispensers.

Can't I just copy the calibration of one dispenser to another?

Yes, if you have All-Bottle dispensers. You can calibrate the coded pourers of one dispenser and copy the calibration values to any other All-Bottle dispensers pouring identical brands. (Since All-Bottle dispensers do not use tubing, there is little variation in calibration values between two dispensers that pour identical brands.) See *Copy ECU* or *Copy Dispenser* in the *Brands, Cocktails, Prices and Portions* section.

You can't copy the calibration values of Laser or TAP 1 dispensers. Each Laser gun or tap controller has its own tubing length, beverage source, etc., so each needs to be calibrated separately. However, you can use the Dispenser Calibration feature to calibrate one button on a Laser gun and copy its values to all other buttons on the gun. (See *Calibrate Dispensers* in this section.) Be sure to calibrate other buttons on the gun that pour beverages with significantly different flow rates (Amaretto, for instance). You don't have to calibrate each button on a TAP 1 tap.

What is activator ring alignment? Is it the same as calibrating?

Activator ring alignment is only performed for All-Bottle 7 dispensers. It ensures the activator ring accurately recognizes each pourer code. Though the activator ring is aligned at the factory, the subtle electronic signals it uses to identify the pourer codes can be affected by installation and changes in components or cables. Aligning the activator ring is a separate task and should be performed before calibration.

How does calibration work?

When you calibrate, you put a dispenser in calibration "mode". In this mode, the dispenser pours only calibration portion sizes. You then go to the dispenser and pour a calibration portion size in a measuring cup or cylinder. At the computer, you enter the exact amount poured. **Infinity** calculates the difference between the amount poured and the calibration portion size. It calculates the difference as a percentage and determines if the percentage is within the defined level of accuracy.

What is level of accuracy or % accuracy?

The level of accuracy is the percentage difference between the amount poured and the amount expected. (A 0% difference means the pour measures exactly as expected.) The default level of accuracy for **Infinity** is a difference of no greater than 10% between the actual pour and the expected pour. If a pour has a percentage difference greater than 10%, you can choose to pour again. (You can change the default 10% level of accuracy. See *Modify Calibration Units and Accuracy* in this section.)

Example of % accuracy

For example, the calibration portion size for TAP 1 is 16 oz. If you pour at a tap and the pour measures only 14 oz, the difference between the expected pour and the actual pour is 2 oz. Figured as a percentage, 2 oz is 12.5% of the calibration portion size. Since 12.5% is greater than the acceptable 10% difference, **Infinity** prompts you to pour again. The next pour measures 15 oz, which has a percentage difference of 6.2% from the expected amount. Since 6.2% is within the 10% level of accuracy, the amount poured is considered close enough to the expected amount. You can move on to calibrate the next tap. (You don't have to perform any calculations to calibrate--**Infinity** does all the calculating.)

When do I calibrate?

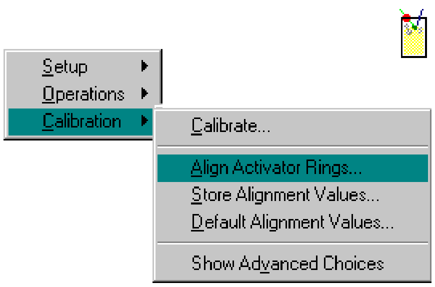
You should calibrate a new system after you've installed all hardware and software and set up the equipment in the software. You should re-calibrate a dispenser if you change the brands poured at the dispenser, or if you make any adjustments to delivery pressure, tubing diameter, etc., or if a brand appears to pour inaccurate portions. Berg recommends you calibrate All-Bottle pourers when the beverage volume is in the middle third of the bottle.

What if I don't calibrate?

If you don't calibrate a new system, unexpected portion sizes often result. If you then try to adjust portion size amounts to account for the unexpected portions, you'll only create more chances for errors in the system. When you call Berg service personnel for help with the errors, they'll ask you to calibrate the system before proceeding with anything else.

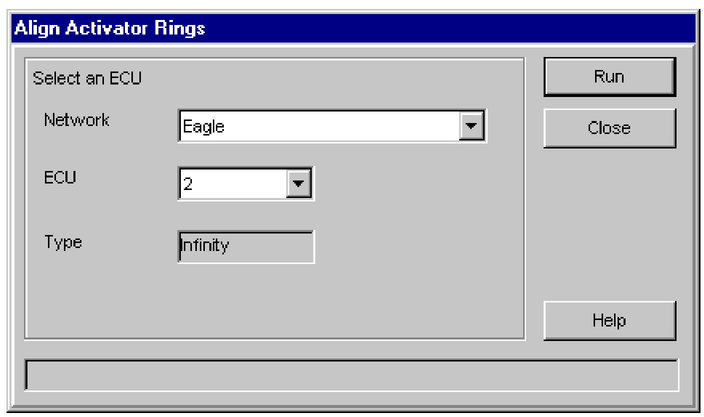
Align All-Bottle 7 Activator Rings

All-Bottle activator rings "read" the subtle electronic signals on each coded pourer to assign the correct price and portion information to a pour. Aligning the activator rings is an important procedure that ensures the activator rings can recognize each pourer's code. You should perform the alignment before calibration and any time you make changes to the I-Box or the activator ring itself. Even changing the length of the cable between the ECU and the I-Box can alter activator ring alignment, so perform this procedure as needed. Use a complete set of coded pourers when you perform the activator ring alignment. You don't need to perform this task for 1544 Infinity ECUs or All-Bottle ID dispensers.



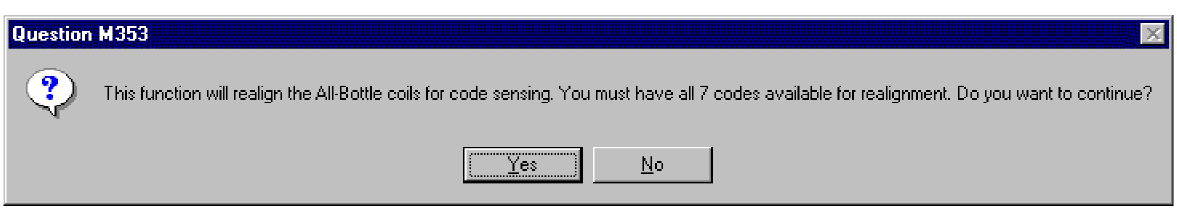
■ To align All-Bottle activator rings:

1. Run **Manager**.
2. Pull down the **Equipment** menu and point to **Calibration**. Click **Align Activator Rings.....**

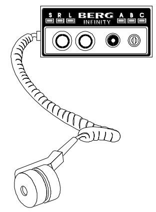


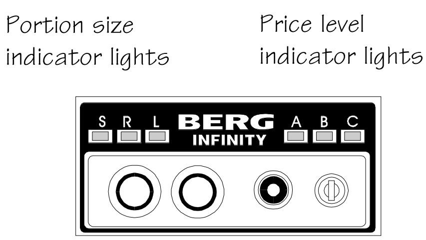
3. Select the name of the **Network**.
4. Select the number of the **ECU** with an All-Bottle activator ring you want to align. Only ECUs with an All-Bottle dispenser are shown.
5. Click **Run** to put the activator ring into alignment mode.

   A message reminds you of the need for a complete set of coded pourers. Make sure the activator ring is in an upright position before proceeding.

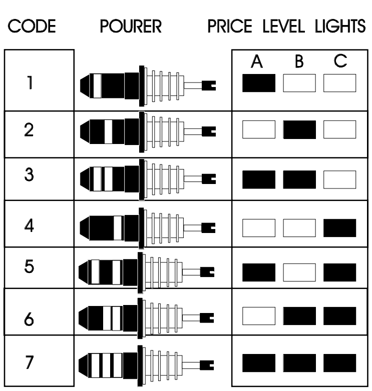


6. Click **Yes** to continue with the alignment or click **No** to cancel the alignment.





Berg light



Code Chart

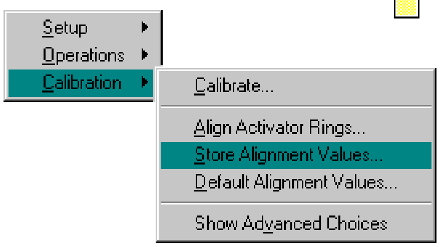
7. Repeat steps 3-6 for every ECU with an activator ring you want to align.
8. Go to any of the activator rings you put into alignment mode. Take a complete set of coded pourers with you.
9. Hold the activator ring upright (as though you were holding a bottle) and place the coded pourers in sequence within convenient reach of your other hand.
10. Make sure the dispenser is ready for you to continue by observing the lights on the dispenser. All six of the portion size and price level indicator lights should be off while the Berg light is blinking.
11. **IMPORTANT.** Turn the empty activator ring over as if to pour a drink and hold the ring in this position until the price level indicator lights change. (This transmits the "no-bottle" state of the activator ring to the ECU.)
12. Return the activator ring to the upright position and insert the pourer that corresponds to the display of price level indicator lights (see the code chart).
13. Tip the activator ring and the pourer upside down and hold in this position until the price level indicator lights change again. (Tipping the activator ring signals the ECU to read the pourer code and change the indicator lights.)
14. Repeat steps 12 and 13 for each of the other coded pourers.

    If a wrong pourer is used for any part of the alignment procedure, finish all remaining tilts for that ECU before starting over at step 3 for that ECU (just tilting with an empty ring is OK).
15. When you've completed the alignment using all coded pourers, the Berg light stops blinking to indicate the procedure for that dispenser is finished.
16. Repeat steps 8-15 for every activator ring you want to align.
17. Return to the computer and click **Close** to exit the **Align Activator Rings** screen.
18. Import the activator ring alignment values from the ECUs to the computer. See *Store Alignment Values* in this section.

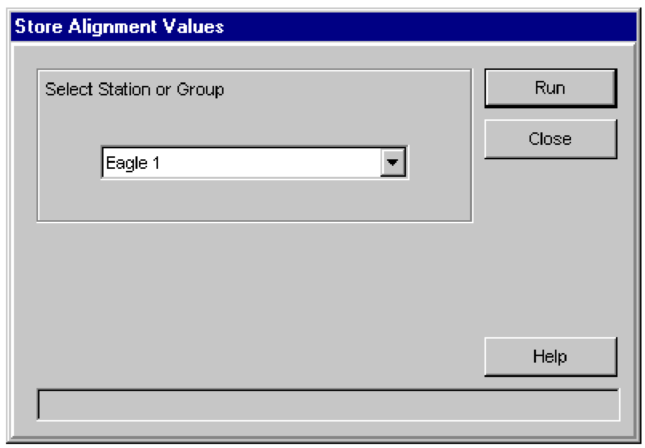
Store Alignment Values

Perform this procedure after aligning All-Bottle activator rings. This procedure imports the activator ring alignment values from the ECUs to "store" them at the computer. It's important for the computer to have a copy of the alignment values so they can be reset at the ECUs if necessary. (If you perform a Restore Station Memory, alignment values at the ECU are reset using the values stored at the computer.)

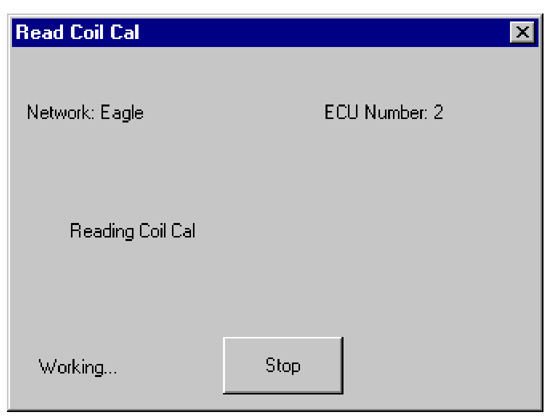
■ To store alignment values:

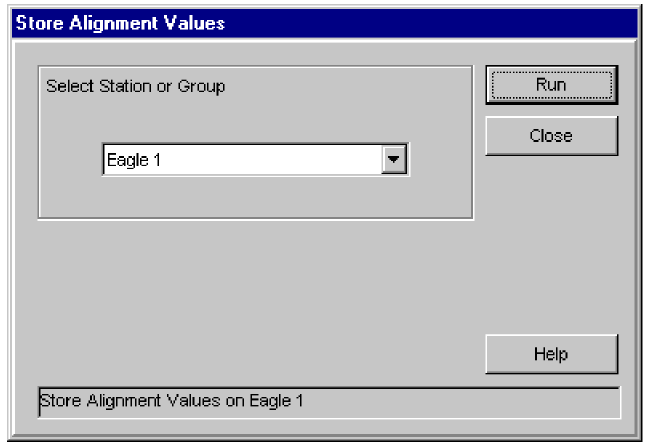


1. Run **Manager**.
2. Pull down the **Equipment** menu and point to **Calibration**. Click **Store Alignment Values.....**



3. Select the name of the **Station** or **Group** with alignment values you want to import. (Select your master group to import the values for all activator rings in one step.)
4. Click **Run** to import the alignment values from the ECU(s) to the computer.



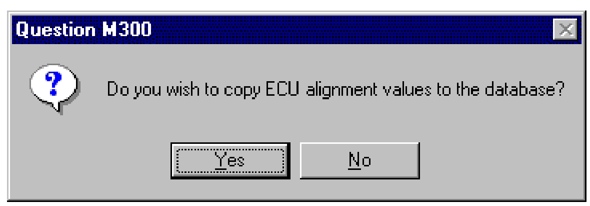


A message informs you when the alignment values are stored.

5. Click **Close** to exit the **Store Alignment Values** screen.

Note

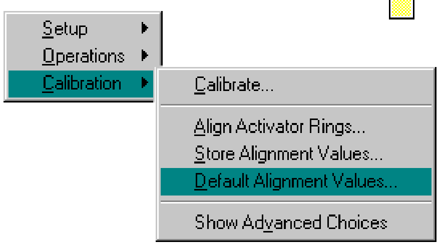
- ❑ If you forget to store alignment values at the computer after performing an activator ring alignment, you'll be prompted to perform this task when you exit the **Manager** program.



Click **Yes** to store the alignment values.

Default Alignment Values

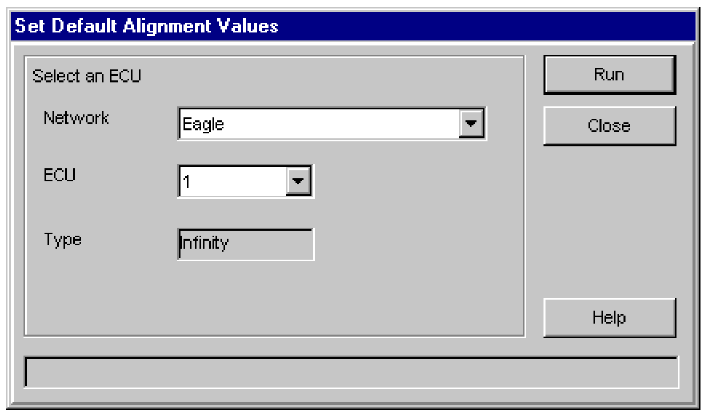
When you set up a new ECU with an All-Bottle dispenser in the software, default alignment values are automatically defined for that activator ring. If you do not have a complete set of coded pourers or something happened to the stored alignment values in your database, use this procedure as a temporary way to set up activator ring alignment values. (If the default values do not work for your coded pourers, you'll need to perform the alignment process. See *Align All-Bottle Activator Rings* in this section.) Berg recommends always aligning the activator rings.



■ To set default alignment values:

1. Run **Manager**.

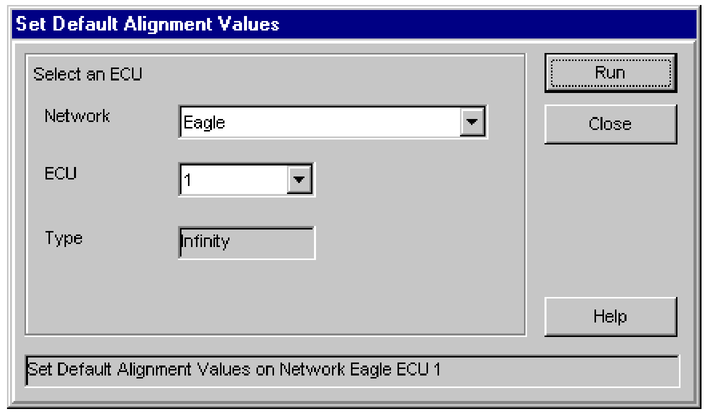
2. Pull down the **Equipment** menu and point to **Calibration**. Click **Default Alignment Values.....**



3. Select the name of the **Network**.

4. Select the number of the **ECU** with an All-Bottle activator ring.

5. Click **Run** to set default alignment values for the ECU.



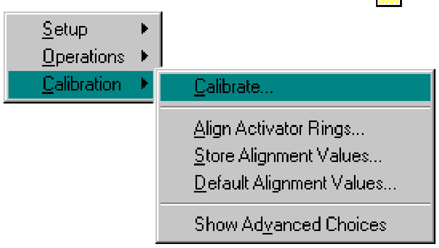
A message informs you when the default values are set.

6. Repeat steps 3-5 for every ECU with an All-Bottle activator ring.

7. Click **Close** to exit the **Set Default Alignment Values** screen.

Calibrate Dispensers

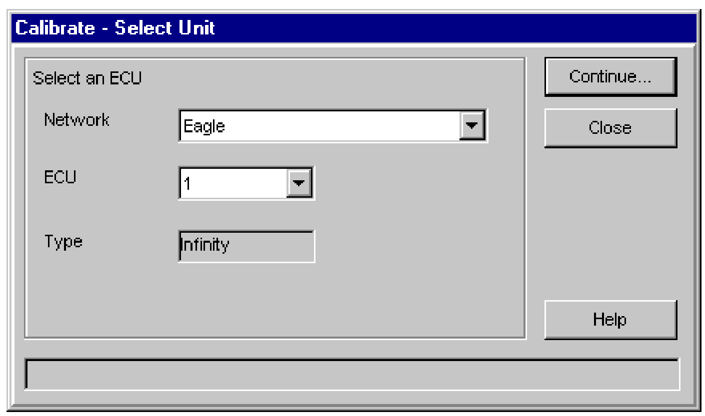
Calibration is vital to the successful installation and maintenance of an **Infinity** system. Calibration provides the data **Infinity** uses to fine-tune the duration of each pour and deliver accurate portions. The calibration procedure involves measuring pours at the dispensers, entering the amount of the pours at the computer, and re-pouring and measuring (as necessary) until the level of accuracy for the pour is acceptable. The default level of accuracy is 10% of the calibration portion size. The calibration portion size is shown using the unit of measure selected for your system. If you need to change the unit of measure (for calibration only) or the level of accuracy see *Calibration Units and Accuracy* in this section. It's helpful to have a partner or carry a portable computer from dispenser to dispenser when performing the calibration procedure.



If you want to put more than one ECU into calibration mode at a time see *Enter Calibration Mode* in this section.

■ To calibrate dispensers:

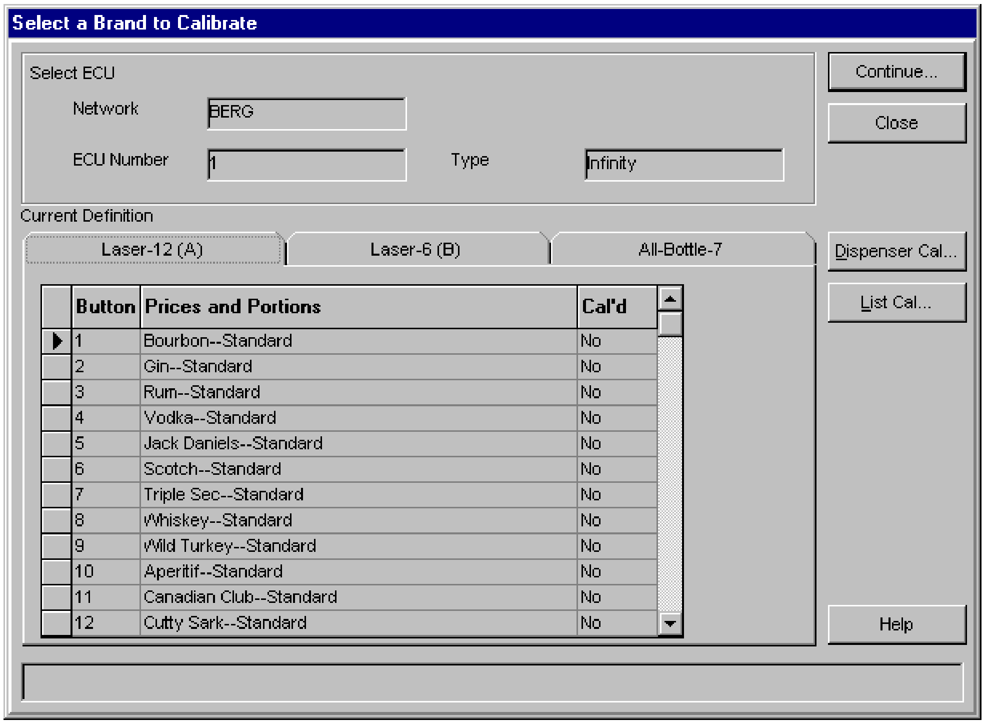
1. Run **Manager**.
2. Pull down the **Equipment** menu and point to **Calibration**. Click **Calibrate....**.



3. Select the name of the **Network**.
4. Select the **ECU** with dispensers you want to calibrate.
5. Click **Continue....**

   The **Select a Brand to Calibrate** screen appears. The tabs on the screen of an Infinity ECU represent the Laser and All-Bottle dispensers connected to the ECU.

Laser and All-Bottle dispensers



6. Select a **Button** number (Laser), pourer **Code** number (All-Bottle) or **Disp.** number (TAP 1) on the displayed dispenser tab.

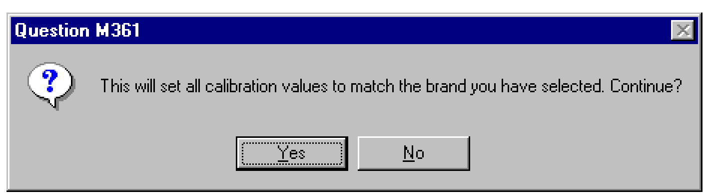
Dispenser Calibration

- You can speed up the process of calibrating All-Bottle pourer codes and Laser gun buttons using "dispenser calibration". (Click the Dispenser Cal... button.)
- Dispenser calibration copies the timing values of the selected Laser button to all other buttons on the gun or the values of one pourer code to all other All-Bottle codes at the dispenser. This brings the values for all buttons or coded pourers (at that dispenser) closer to the correct range.
- You still have to calibrate the other buttons and pourer codes using "brand calibration"—just click Continue... after you select a brand. (Use the Dispenser Cal... button only once for each dispenser.)

7. Click **Continue...** to perform calibration only for the **Button** number, pourer **Code** number or **Disp.** number you have selected.

OR

Click **Dispenser Cal...** to perform a dispenser calibration for the displayed dispenser (All-Bottle or Laser only). Select a brand that is representative of the viscosity (or thickness) of most brands at the dispenser.



This calibrates the button number or coded pourer you have selected and copies its calibration values to all other button numbers or coded pourers at the dispenser. Click **Yes** to continue.

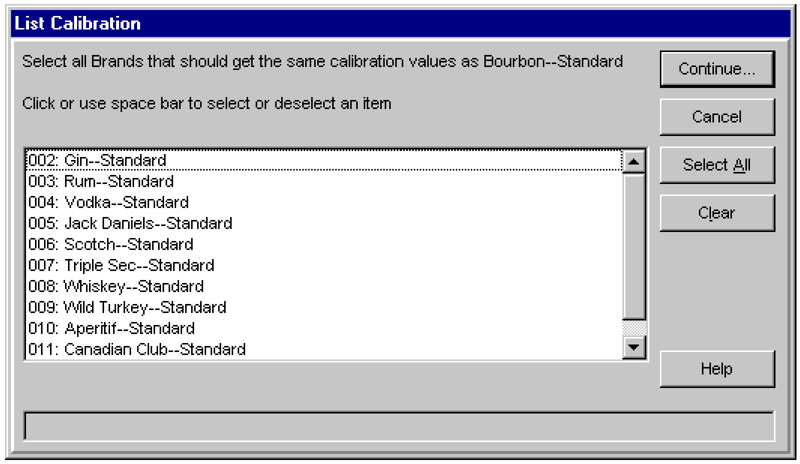
(continued on next page)

List Calibration

- List calibration is similar to Dispenser calibration. However, you can select which brands at the dispenser receive the selected brand's calibration values.
- List calibration copies the timing values of the selected brand to other brands which you select on the gun. Or it copies the values of one pourer code to any other pourer code you select at the dispenser. This brings the values for all buttons or coded pourers which you've selected closer to the correct range.
- For the most accuracy, you still have to calibrate the other buttons and pourer codes using "brand calibration"—just click Continue... after you select a brand.

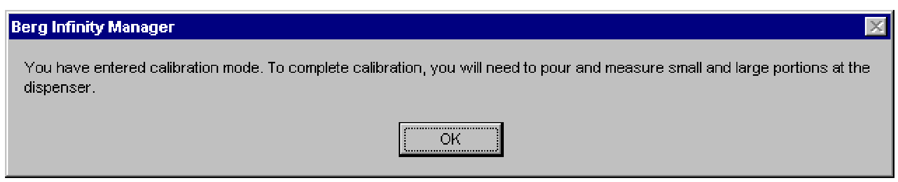
OR

Click **List Cal...** to calibrate the brand you've selected and copy its calibration values to other brands at this dispenser you select (All-Bottle or Laser only).



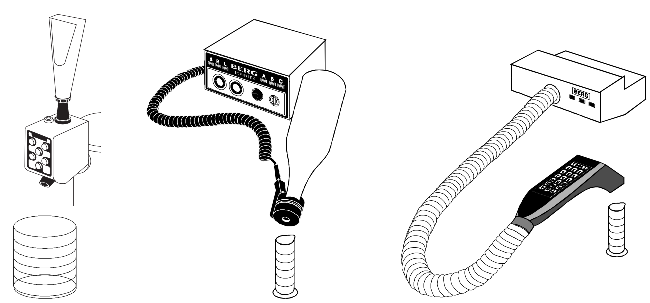
Select the brands to receive the calibration values and click **Continue...**. (Use the space bar or a mouse click to select or de-select brands. Click **Select All** to select all brands or **Clear** to de-select all brands.)

Wait while the dispenser is put into calibration mode.



8. Click **OK** when you've read the message about entering calibration mode.

Berg recommends you calibrate All-Bottle pourers when the beverage volume is in the middle third of the bottle.



9. Go to the dispenser and pour a drink using a measuring cup or graduated cylinder. Record the amount of each pour.

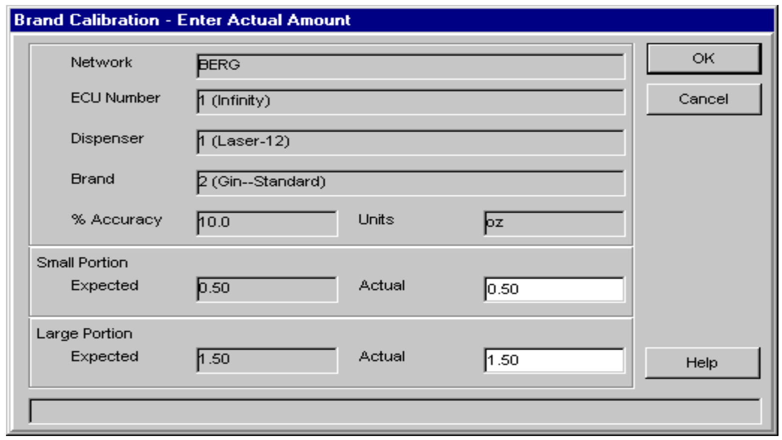
Calibration Portion Sizes

- You can define your small and large calibration portion sizes. See *Modify Calibration Units and Accuracy* in this section.

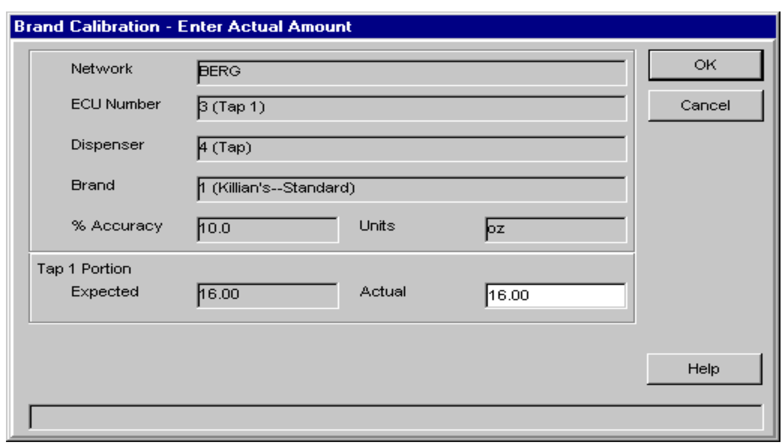
At an All-Bottle or Laser dispenser, pour a small portion first and then a large portion with the button number or coded pourer you selected. (For EPROMs 3.0 or greater, All-Bottle and Laser dispensers automatically switch to small portion size when put in calibration mode. After you pour a small portion, they switch to large. You can still toggle between the two. You can't set the portion size to regular.)

At a TAP 1 tap, pour a single portion with button 1 at the tap number you selected. (Wait for any foam to settle before measuring.)

At a 1544 Infinity ECU, pour a single portion with the coded pourer you selected.



10. At the computer type the exact amount poured for the small portion in the **Small Portion Actual** field and the exact amount poured for the large portion in the **Large Portion Actual** field.



OR

Type a TAP 1 amount in the **Tap 1 Portion Actual** field or a 1544 amount in the **1544 Portion Actual** field.

11. Click **OK**.

(continued on next page)

Calibration Mode

- In calibration mode, the regular portion size won't work on Laser and All-Bottle dispensers and all tap buttons pour 16 oz. With EPROMs 3.0 or greater, the portion size light at the I-Box or on the Laser gun blinks and the lights behind tap buttons 2, 3, and 4 go out. When a 1544 Infinity ECU is in calibration mode, all size and price level lights go on. An All-Bottle ID dispenser displays "Calibrate" and the intended pour size.
- When you complete the steps in this procedure, the dispenser is automatically taken out of calibration mode. With EPROMs 3.0 or greater, none of the calibration pours are recorded as sales.

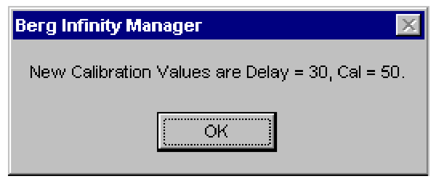
Monitor Mode Calibration (TAP 1)

- When you calibrate flow meters in lines without TAP 1 tap controllers, you can't discern calibration mode at the tap with lights or programmed portion sizes.
- Perform the same calibration steps. The amount you pour will be compared with the amount recorded by the ECU. (The amount you pour is not fixed at 16 oz.) Pour at least a full glass or representative pour. Calibration pours will be recorded as sales.

Level of Accuracy

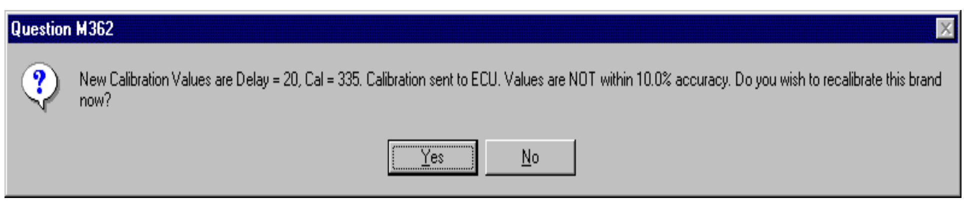
Level of accuracy is the percentage of difference between the amount poured and amount expected. The default level of accuracy is 10%.

Infinity displays new calibration values based on the amounts you entered.



12. If the values are within the accepted accuracy range, you'll see a message displaying the values. Click **OK**. Proceed with step 14.

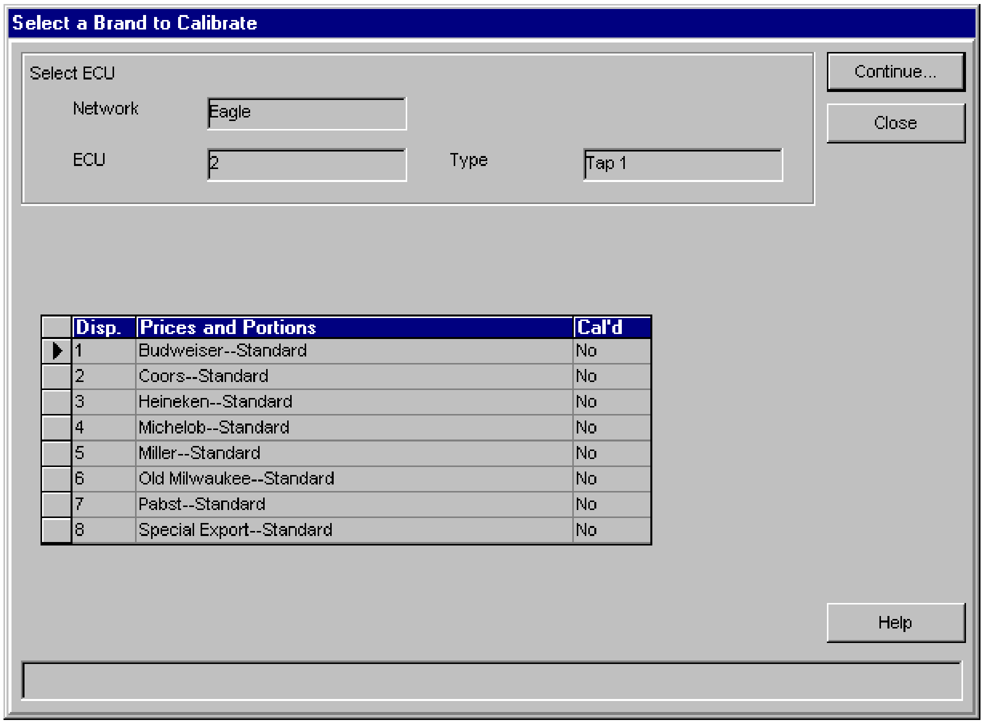
    OR



If the values are not within the accepted accuracy range, click **Yes** to re-calibrate. If you click **No**, **Infinity** considers the brand calibrated but it might not pour at the accepted level of accuracy.

13. If you clicked **Yes** repeat steps 9-12 until the level of accuracy is acceptable. Each time you enter a new amount for an actual pour, **Infinity** recalculates the timing values needed to bring the actual pour closer to the calibration portion size.

TAP 1 dispensers



14. Select the next button, coded pourer or tap to calibrate and repeat steps 7-13. Do not click **Dispenser Cal...** for more than one button or coded pourer at the dispenser.

15. When you've calibrated all button numbers or coded pourers at a dispenser, click the tab for the next dispenser (if any) at an Infinity ECU and repeat steps 7-14.

16. When you've calibrated all dispensers at the ECU click **Close** to exit the **Select a Brand to Calibrate** screen.

17. Repeat steps 3-16 for each ECU in the system.

18. Click **Close** to exit the **Calibrate - Select a Unit** screen.

Notes

- ❑ If you are converting a stand-alone TAP 1 system to work with **Infinity**, enter the meter counts and flow rates (listed on a TAP 1 configuration report) in the software before performing calibration. *See Initialize Calibration Values* in this section.
- ❑ You can copy the calibration values of an All-Bottle dispenser to another All-Bottle dispenser. See *Copy Dispenser Assignments* in the *Brands, Cocktails, Prices and Portions* section. You can't copy the calibration values of Laser or TAP 1 dispensers to other dispensers.
- ❑ All-Bottle ID dispenser calibration values are automatically copied to all other All-Bottle ID dispensers.

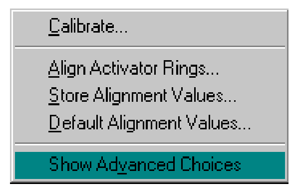
Show Advanced Calibration Choices

To see more calibration menu items you can select this option. The additional menu items help you perform tasks you may not use your first time calibrating an **Infinity** system. The advanced calibration choices include the following menu items: **Units and Accuracy...**, **Enter Calibration Mode...**, **Exit Calibration Mode**, and **Initialize Calibration Values...**.

■ To access advanced calibration choices:

1. Run **Manager**.

2. Pull down the **Equipment** menu and point to **Calibration**.

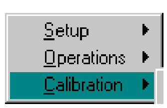


3. Click **Show Advanced Choices** to see additional menu items.

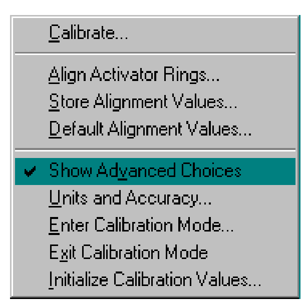
   The menu disappears. When you access it again the **Calibration** menu shows additional items and continues to do so until you hide them again.

■ To hide advanced calibration choices:

1. Run **Manager**.



2. Pull down the **Equipment** menu and point to **Calibration**.
3. Click **Show Advanced Choices** (it should be checked) to hide the additional menu items.



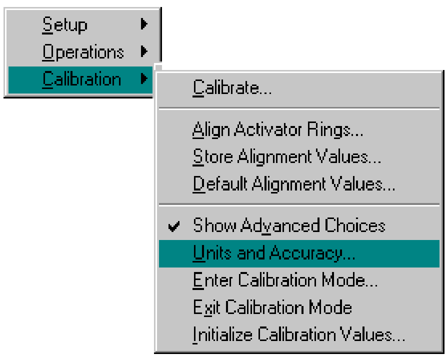
   The menu disappears. When you access it again the **Calibration** menu hides the additional items and continues to do so until you access them again.

Modify Calibration Units and Accuracy

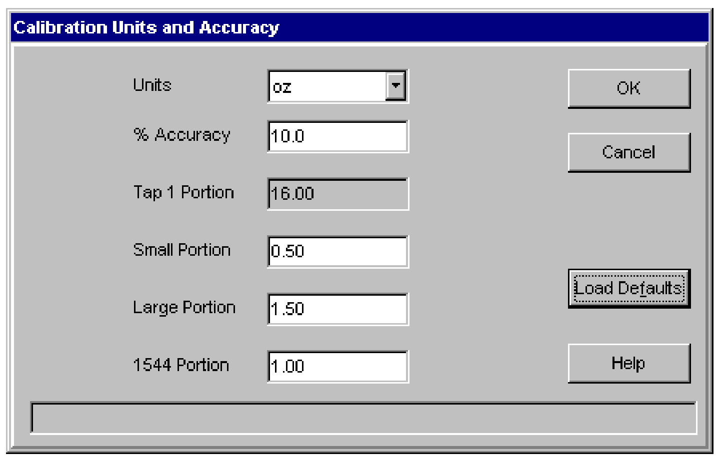
Perform this task if you want to change the default calibration unit of measure, the default calibration level of accuracy, or the default calibration portion sizes. A common reason for changing the default unit of measure is the use of metric units on graduated cylinders. You can change the calibration unit of measure to milliliters (or any other unit) without affecting the unit of measure set up for the entire system. The default level of accuracy is 10% but you may want to change this if you need a higher level of accuracy. You may want to modify the default calibration portion sizes if you prefer to pour calibration portions that are exactly the same as your small and large portion sizes. To perform this task you must first expand the **Calibration** menu. See *Show Advanced Calibration Choices* in this section.

■ **To modify calibration units and accuracy:**

1. Run **Manager**.

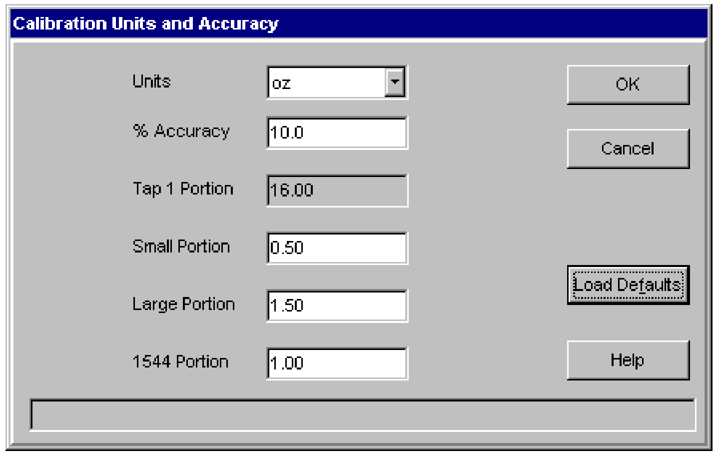


2. Pull down the **Equipment** menu and point to **Calibration**. Click **Units and Accuracy.....** (**Show Advanced Choices** must be checked.)



3. Select the **Units** in which to measure calibration portion sizes. Choose from ounces (oz), milliliters (ml), cubic centimeters (cc), centiliters (cl) or liters (l). (Your selection changes the calibration unit only; it doesn't change the unit of measure you selected on the **Country Options** screen.) The default calibration unit of measure is whatever unit your system uses.

4. Type the **% Accuracy**. The percentage of accuracy is the percentage difference between the amount actually poured and the calibration portion size. The percentage of accuracy must be between 2% (high level of accuracy) and 50% (low level of accuracy). The default level of accuracy is 10%. (For further discussion of level of accuracy see *What is Calibration?* in this section.)



5. Type the **Small Portion** size. This is the small portion size All-Bottle and Laser dispensers pour when they are in calibration mode. The small portion size must be at least .5 oz (15 ml) and no larger than one-third of the large portion size. The default small portion size is .5 oz (15 ml).

6. Type the **Large Portion** size. This is the large portion size All-Bottle and Laser dispensers pour when they are in calibration mode. The large portion size must be at least 3 times greater than the small portion size and no greater than 6 oz (150 ml). The default large portion size is 1.5 oz (45 ml).

7. Type the **1544 Portion** size. This is the single portion size 1544 Infinity ECUs pour when they are in calibration mode. This portion size must be between .5 oz (15 ml) and 6 oz (150 ml). The default 1544 portion size is 1 oz (30 ml).

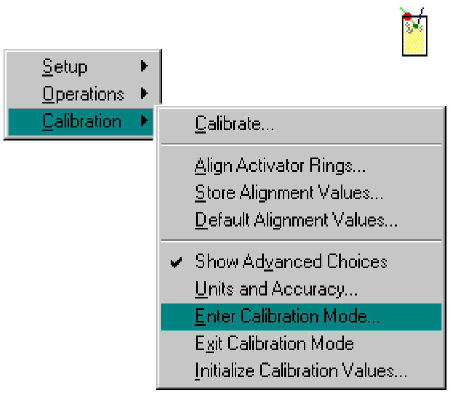
8. Click **OK** to save your entries and exit the **Calibration Units and Accuracy** screen.

Notes

- ❑ You can't modify the TAP 1 calibration portion size–it remains set at 16 oz (475 ml).
- ❑ **Infinity** retains any changes you make to calibration units and accuracy.

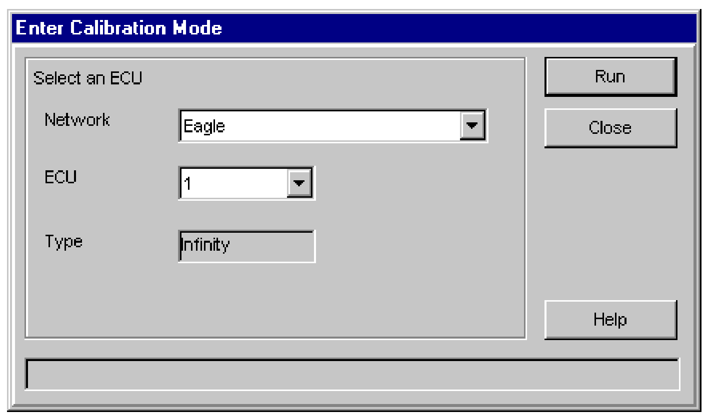
Enter Calibration Mode

This advanced calibration feature lets you put any number of ECUs in calibration mode at the same time. You still perform the same basic calibration tasks described in *Calibrate All Dispensers* in this section. However, if you use this feature you can save trips back and forth to the computer. For example, if the computer is in an office distant from the bar, you can go to the office, put all the ECUs in calibration mode and then go to the bar. At the bar, you can pour and record calibration portions at all dispensers. Then go back to the office to enter the actual pour amounts. Jot down any dispensers that need an additional pour (click No when prompted to "recalibrate at this time"). Go back to the dispensers that need more pours and record the pour amounts. Return to the office to enter the amounts, etc. Instead of making all the back and forth trips for each ECU, you're making them for the entire system. To use this calibration feature, first expand the **Calibration** menu. See *Show Advanced Calibration Choices* in this section.



■ **To enter calibration mode for one or more ECUs:**

1. Run **Manager**.
2. Pull down the **Equipment** menu and point to **Calibration**. Click **Enter Calibration Mode....** (**Show Advanced Choices** must be checked.)

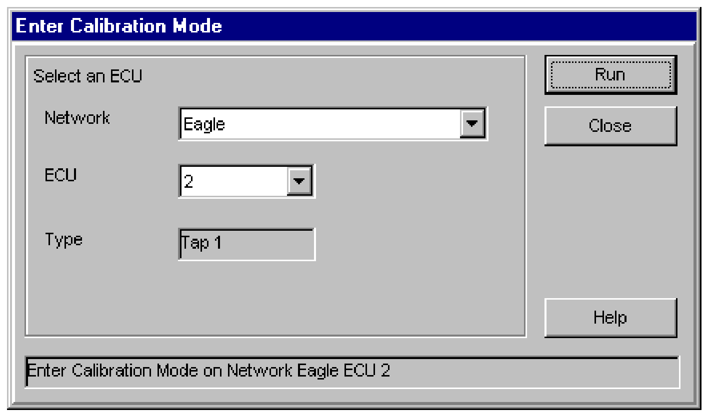


3. Select the name of the **Network**.
4. Select the number of the **ECU** with dispensers you want to calibrate.
5. Click **Run**.

   Wait while the ECU is put into calibration mode.When an ECU is in calibration mode, the regular portion size won't work on Laser and All-Bottle dispensers and all tap buttons pour 16 oz. With EPROMS 3.0 or greater, the small portion size light at the I-Box and on the Laser guns blinks. (After you pour a small portion, the large portion size light blinks.) The lights behind tap buttons 2, 3, and 4 go out. The size and price level lights of a 1544 Infinity ECU go on.

6. Click **OK** when you've read the message box about entering calibration mode.

   The ECU you have selected now pours calibration portion sizes on all dispensers and continues to do so until you use **Exit Calibration Mode...** or exit the **Manager** program. (With EPROMS 3.0 or greater, none of the pours are recorded as sales.) This message only appears for the first ECU you put in calibration mode.



Berg recommends you calibrate All-Bottle pourers when the beverage volume is in the middle third of the bottle.

7. Repeat steps 3-5 for each ECU you want to put in calibration mode.

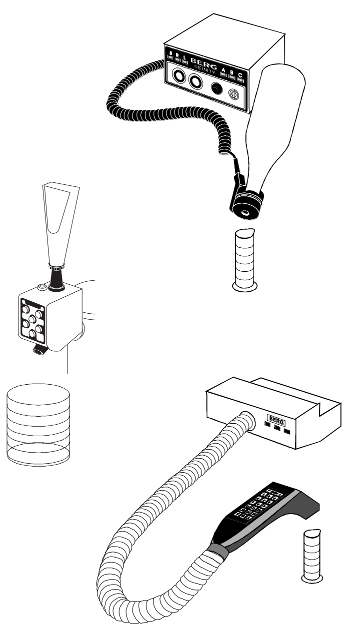
8. Click **Close** to exit the **Enter Calibration Mode** screen when you have finished entering ECUs.

9. Go to the dispensers and pour drink(s) using a measuring cup or graduated cylinder. Record the Laser gun button number or the All-Bottle coded pourer number or the tap controller number and the exact amount of each pour.

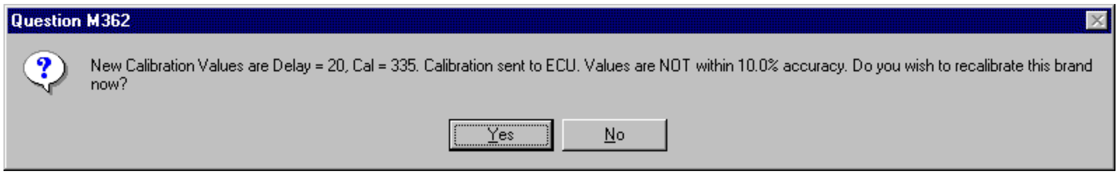
   At an All-Bottle or Laser dispenser, pour a small portion first and then a large portion. (For EPROMS 3.0 or greater, All-Bottle and Laser dispensers automatically switch to small portion size when put in calibration mode. After you pour a small portion, they switch to large. You can press either the small or large portion size buttons to toggle between the two sizes. You can't set the portion size to regular.)

   At a TAP 1 tap, pour a single portion with button 1.

   At a 1544 Infinity ECU, pour a single portion with the selected coded pourer. Sizes or price levels can't be changed.



10. Perform the steps outlined in *Calibrate All-Bottle or Laser Dispensers* or *Calibrate TAP 1 Dispensers*. The only difference is you have already entered calibration mode and made your calibration pours. You still have to select one ECU at a time and enter the amount of the calibration pours.



If the level of accuracy is not acceptable for a pour and you want to conserve trips to the bar, click **No** when prompted to recalibrate at this time. Write down all dispensers that need additional pours. When you finish entering pour amounts make another trip to the bar for additional pours and then return to the computer to re-enter the amounts.

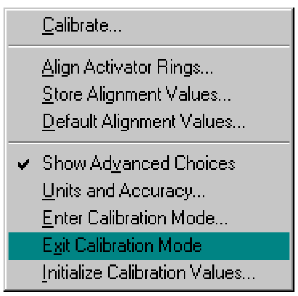
11. When you have completed the calibration process and want to take all the ECUs out of calibration mode, perform the steps outlined in *Exit Calibration Mode* in this section. (The ECUs are not automatically taken out of calibration mode when you complete the calibration process.)

Notes

- ❑ If you change your mind, get interrupted or for any other reason want to take an ECU out of calibration mode before the calibration process is complete see *Exit Calibration Mode* in this section.
- ❑ If you forget to take the ECUs out of calibration mode, you won't be able to pour a regular portion size at Laser or All-Bottle dispensers and all tap buttons pour 16 oz (475 ml). With EPROMs 3.0 or greater, the lights help you see if a dispenser is still in calibration mode.
- ❑ If you exit the **Manager** program with ECUs still in calibration mode the ECUs are automatically taken out of calibration mode.

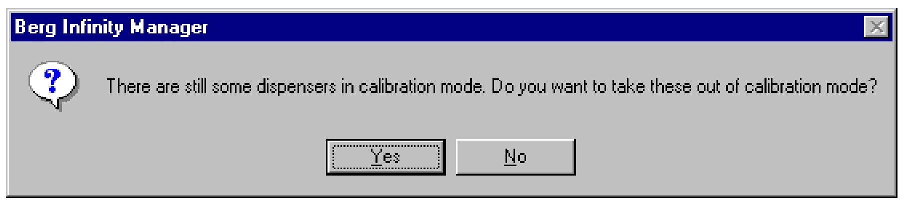
Exit Calibration Mode

Use this advanced calibration choice only if you have used the **Enter Calibration Mode...** menu item. You do not have to use this feature if you complete the calibration process outlined in *Calibrate All Dispensers*. This procedure exits calibration mode for all ECUs. (You can't select specific ECUs to exit calibration mode.) To use this calibration feature you must first expand the **Calibration** menu. See *Show Advanced Calibration Choices* in this section.

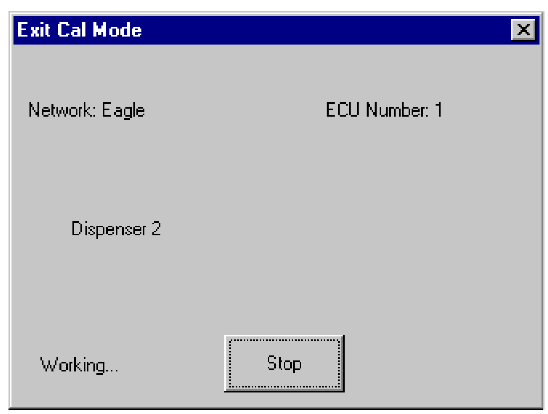


■ To exit calibration mode:

1. Run **Manager**.
2. Pull down the **Equipment** menu and point to **Calibration**. Click **Exit Calibration Mode.....** (**Show Advanced Choices** must be checked.)



3. Click **Yes** to exit calibration mode for all ECUs. Click **No** to stay in calibration mode.



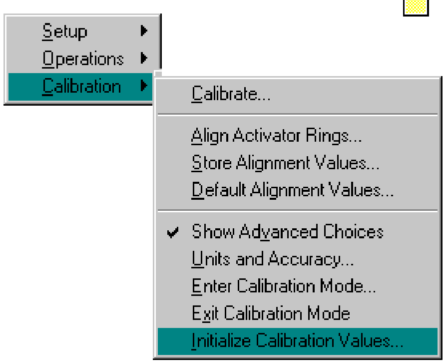
4. Wait while the ECUs are taken out of calibration mode.

Note

❑ If you exit the **Manager** program with ECUs still in calibration mode the ECUs are automatically taken out of calibration mode.

Initialize Calibration Values

Perform this task if you know the correct timing values or meter count/flow rate numbers for your dispensers. Entering the correct values speeds up the calibration process and is helpful if you are upgrading a system and already know the exact values or when something happens to your database and you need to re-enter the values. (The delay/cal values and meter count/flow rate values can be found on a price/portion report.) To use this calibration feature you must first expand the **Calibration** menu. See *Show Advanced Calibration Choices* in this section.

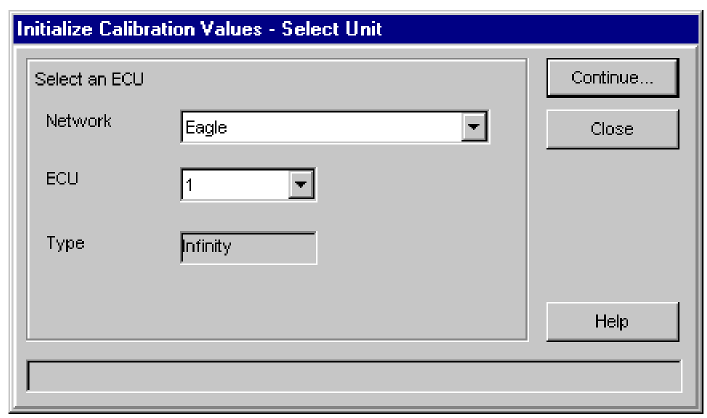


Switching to High Flow Pourers

If you switch from standard flow to high flow pourers, you should re-calibrate the brands using the new pourers. You can speed up the calibration process by entering the high flow Delay and Cal values before calibration.

■ To initialize calibration values:

1. Run **Manager**.
2. Pull down the **Equipment** menu and point to **Calibration**. Click **Initialize Calibration Values.....** (**Show Advanced Choices** must be checked.)



3. Select the name of the **Network**.
4. Select the number of the **ECU** with delay/cal values or meter count/flow rates you want to change.
5. Click **Continue....**

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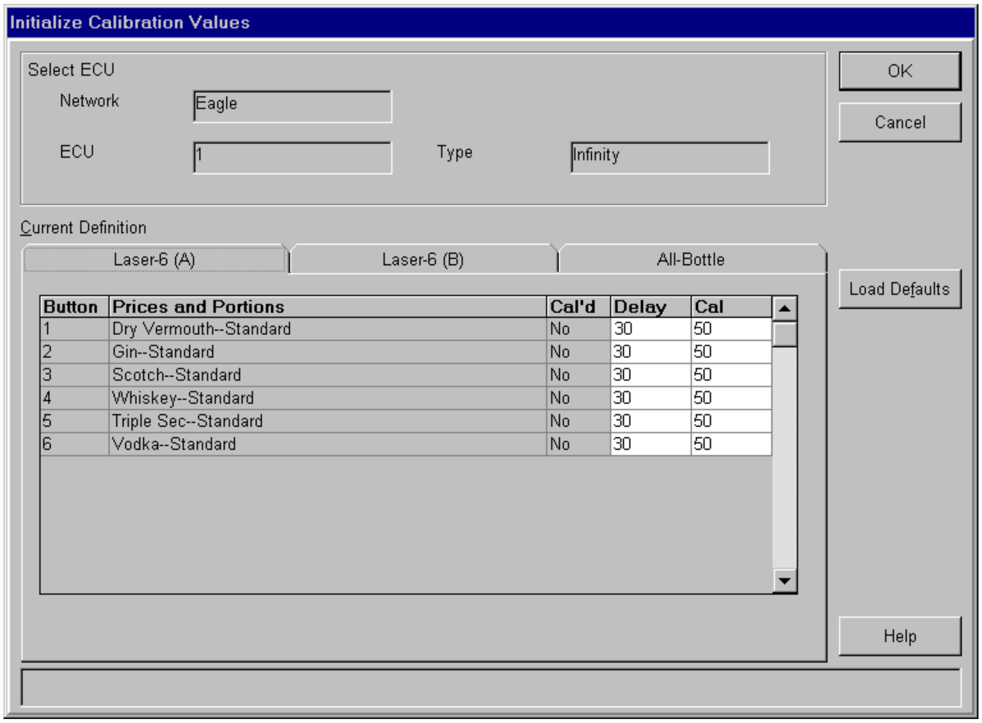


Load Defaults

Click Load Defaults to see the default calibration values on all tabs. You'll be prompted to choose standard or high flow pourers if you have an All-Bottle 7 dispenser.

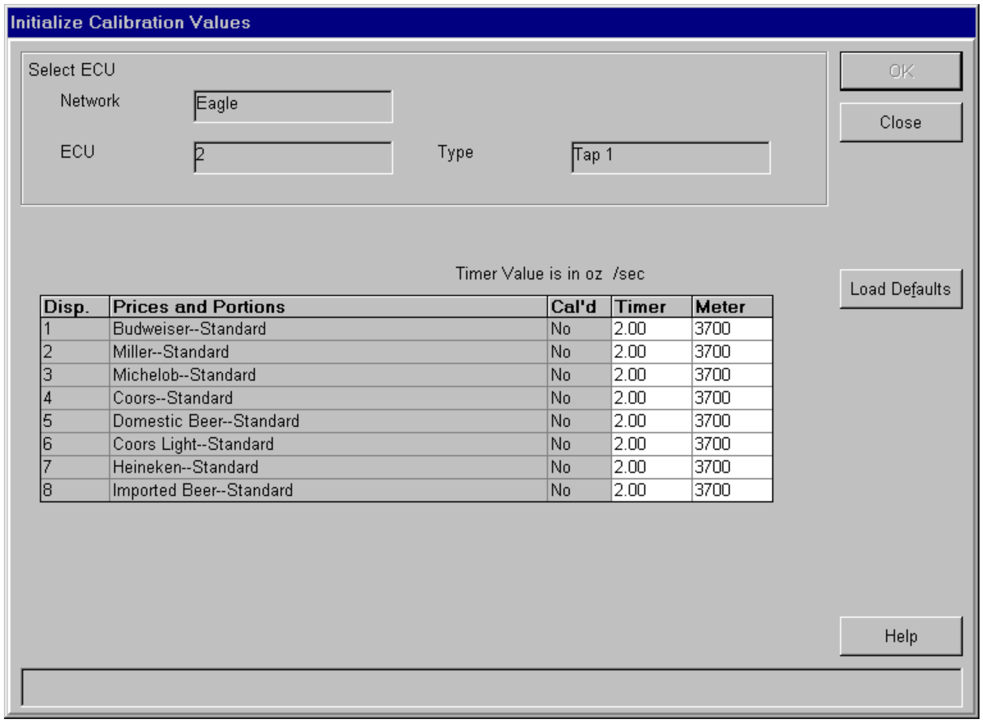
6. For an Infinity ECU type in the correct values in the **Delay** and **Cal** fields for each button number on the displayed Laser dispenser or each coded pourer on an All-Bottle dispenser.

   For a 1544 Infinity ECU type in the correct values in the **Cal** fields for each coded pourer. (The **Delay** values are fixed.)

   Delay and Cal are the timing values adjusted during calibration to regulate the duration of each pour. The default values are listed in the following table. Default delay values may vary based on dispenser type, pourer type and/or assigned brand.

Unit of Measure	All-Bottle 7 Standard Flow		All-Bottle 7 High Flow		Laser		1544 Infinity High Flow		All-Bottle ID High Flow	
	Delay	Cal	Delay	Cal	Delay	Cal	Delay	Cal	Delay	Cal
oz	5	80	5	60	30	50	20	670	5	60
metric	20	25	20	19	40	15	20	200	20	19

7. Click the tab for the next dispenser (if any) and repeat step 6.



8. For a TAP 1 ECU type in the correct flow rate in the **Timer** field or the correct flow meter count in the **Meter** field for each tap controller.

   The default flow rate is 2 oz (59.1 ml) of beverage per second. If you want to estimate the actual flow rate of a tap controller use a stopwatch to pour for exactly 10 seconds into a 20 ounce or larger measuring cup. When the foam settles divide the number of ounces or milliliters poured by 10. This is the estimated flow rate.

   The default flow meter count is 3700. The flow meter count is the number on the flow meter you recorded and saved at the time of installation.

9. Click **OK** to save your entries and exit the **Initialize Calibration Values** screen. For an Infinity ECU **OK** saves entries for all tabs at the same time.

SECTION 13

Equipment Operations

You can control day to day operations of stations and groups using **Infinity** software. This section provides help with the following tasks:

Enable or Disable a Station or Group

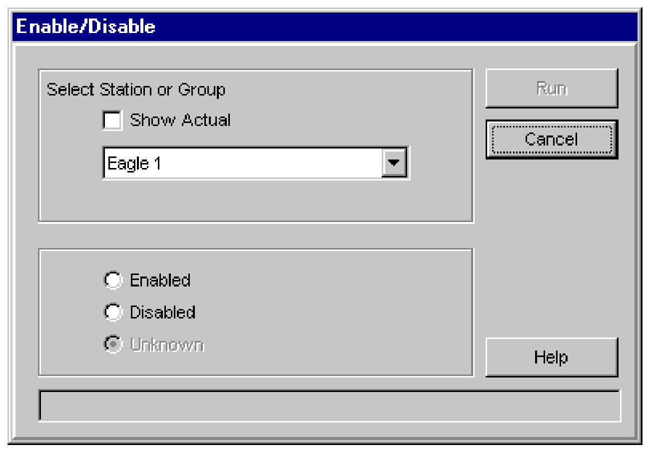
Use this feature to activate or deactivate stations or groups within an **Infinity** system. A station is the smallest component of the system for which you can perform this operation. (You can't enable or disable a single dispenser.) **Infinity** can automatically perform this task at specified times if you include it in a schedule. See the *Schedules* section.

You can also access this feature using the Equipment | Operations menu.

■ To enable or disable a station or group:

1. Run **Manager**.

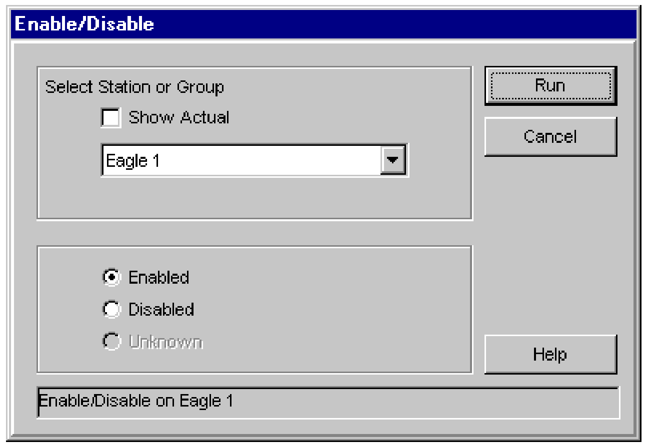
2. Pull down the **Operations** menu and click **Enable/ Disable...**.



3. Select the name of the **Station or Group** you want to enable or disable.
4. Select **Show Actual** if you want the software to communicate with the ECUs to determine their current status. Wait while the communication occurs.
5. Select **Enabled** to enable the station or group you have selected.

   OR

   Select **Disabled** to disable the station or group you have selected.
6. Click **Run** to send the enable or disable message to the ECUs.



Wait while the communication occurs. A message informs you when the procedure is complete.

7. Click **Cancel** to exit the **Enable/Disable** screen.

Note

- The **Unknown** field is selected if **Show Actual** is not selected. (The software has no way of knowing the current enable status of an ECU unless it communicates with the ECU.) The **Unknown** field may also be selected if some ECUs within a group you've selected are enabled and others are disabled.

Change the Price Level of a Station or Group

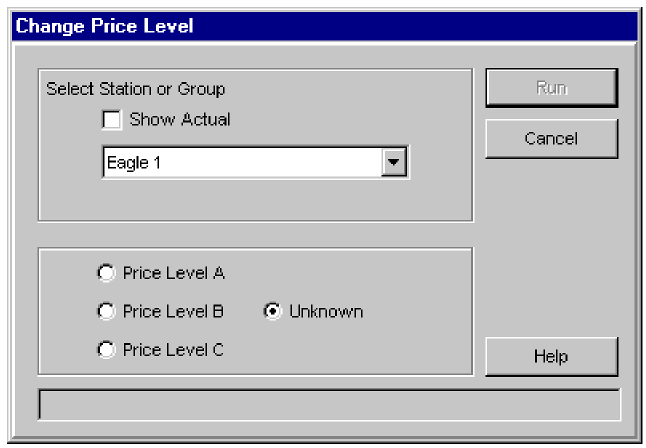
You can quickly make price level changes for a station or group using the software. This is a convenient way to change the price level for the entire system. **Infinity** can automatically perform this task at specified times if you include it in a schedule. See the *Schedules* section.

You can also access this feature using the Equipment | Operations menu.

■ To change the price level of a station or group:

1. Run **Manager**.

2. Pull down the **Operations** menu and click **Change Price Level...**.



3. Select the name of the **Station or Group** whose price level you want to change.
4. Select **Show Actual** if you want the software to communicate with the ECUs to determine their current status. Wait while the communication occurs.
5. Select the new price level.
6. Click **Run** to communicate the change to the ECUs.

Wait while the communication occurs. A message informs you when the change is complete.

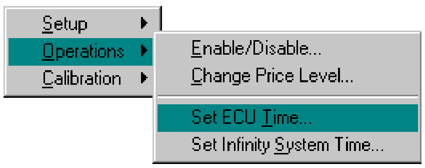
7. Click **Cancel** to exit the **Change Price Level** screen.

Note

- The **Unknown** field is selected if **Show Actual** is not selected. (The software has no way of knowing the current price level of an ECU unless it communicates with the ECU.) The **Unknown** field may also be selected if the ECUs within a group you've selected are currently using different price levels.

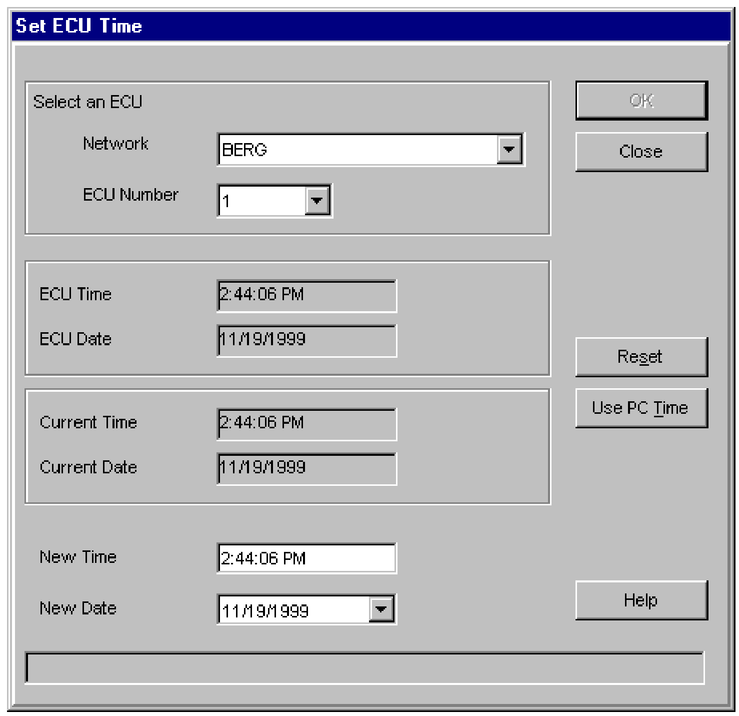
Set an ECU's Date/Time

You can adjust the time and/or date at an individual ECU using this feature. It's a good idea to keep the same time set on the computer and all the ECUs in an **Infinity** system.



■ To set an ECU's date/time:

1. Run **Manager**.
2. Pull down the **Equipment** menu and point to **Operations**. Click **Set ECU Time.....**



Date/Time Formats

Enter the new date and time in the format displayed for your Windows system.

3. Select the name of the **Network**.
4. Select the number of the **ECU**.
5. Type the **New Time** for the ECU.

   Type the **New Date** for the ECU.

New Date

Click the drop-down arrow to see a calendar from which to choose your date.

OR

Click **Use PC Time** to set the new ECU time and date to match the computer time.

6. Click **Reset** to update the displayed times (they do not automatically advance as time passes).
7. Click **OK** to save your entries and reset the ECU time. (Click **Cancel** to exit without saving.)

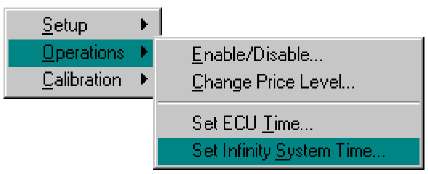
   Wait while the change is communicated to the ECU.
8. Click **Close** to exit the **Set ECU Time** screen.

Set the Infinity System Date/Time

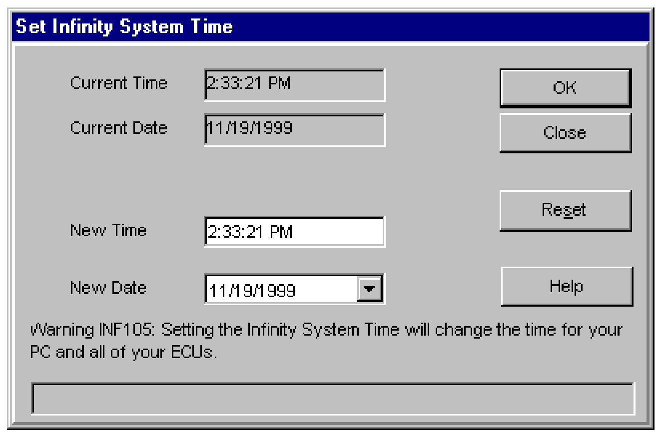
Perform this operation when you need to reset the time and/or date for the computer and all the ECUs in an **Infinity** system. If you only need to set the computer time and/or date use the Date/Time feature under the Windows Control Panel. If you only need to set an ECU's time see **Set ECU Time** in this section.

■ To set the Infinity system date/time:

1. Run **Manager**.



2. Pull down the **Equipment** menu and point to **Operations**. Click **Set Infinity System Time.....**



Date/Time Formats

Enter the new date and time in the format displayed for your Windows system.

3. Type the **New Time** for the computer and ECUs.

   Type the **New Date** for the computer and ECUs.

4. Click **Reset** to update the displayed times (they do not automatically advance as time passes).

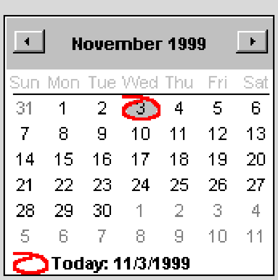
5. Click **OK** to save your entries and reset the entire system time. (Click **Cancel** to exit without saving.)

   Wait while the change is communicated to all the ECUs.

6. Click **Close** to exit the **Set Infinity System Time** screen.

New Date

Click the drop-down arrow to see a calendar from which to choose your date.



SECTION

14 Server ID

Server ID is a feature of **Infinity** that provides security through the use of access keys assigned to specific servers. To use server ID you must have EPROM version 3.04 for Infinity ECUs, version 3.08 for 1544 Infinity ECUs and version 5.04 for TAP 1 ECUs.You must also install the correct hardware to use the keys. You must enable the server ID features of **Infinity** software. Each server must be assigned a key with specific options enabled or disabled. This section provides help with the following tasks:

What is Server ID?

Server ID is an optional feature of **Infinity** that controls access to pouring operations with server keys. With server ID enabled, a server can only pour a drink by using a valid key. This feature provides both security and accountability.

What do I have to do to use server ID?

EPROM version

Server ID requires the following minimum EPROM version numbers in each ECU:

- Version 3.04 for Infinity ECUs
- Version 3.08 for 1544 Infinity ECUs
- Version 5.04 for TAP 1 ECUs

- Use the appropriate EPROM version in the ECU(s).
- Install the Datakey box and the remote server access box (see the *Hardware Installation* section).
- Enable the Server ID feature of the software (see the *Configuration Options* section).
- Set the server key code (see *Set the Server Key Code* in this section).
- Enable the server ID feature for each ECU (see the *New ECU Setup* tasks in the *Network and ECU Setup* section).
- Set up a server list with unique server names (see *Add a Server* in this section).
- Assign a key to each server (see *Assign or Modify a Server Key* in this section).
- Manage the keys and server sales data (see the tasks in this section for managing keys, see the *Reports* section to run server reports).

How do the keys work?

When you assign a key to a server, you electronically program the key with the server's name, an ID number and a system-wide key code. You specify if the key is valid for the entire system or only selected stations, whether comp pouring is allowed and whether the key has an expiration date. The server must then insert the key in a server key receptacle to pour drinks at dispensers enabled with server ID. If a valid key is inserted, pouring is enabled at the dispenser and all pours and sales that occur while the key is inserted are assigned to the server. The server pours, sales, comp sales and cancel sales are recorded in the ECU.

How many servers can use the system?

You can add an unlimited number of servers to your server list and assign an unlimited number of server keys. However, each ECU keeps track of server sales data for 20 servers at one time. (If you have a TAP 1 ECU split into more than 4 partitions, the TAP 1 ECU tracks sales for 10 servers at each partition.) The 20 servers can be different at each ECU.

If you have more than 20 servers using the same ECU at the same time, the server sales data in the ECU for the server that's been pouring the longest will be erased when the 21st server inserts a valid key.

The total sales data in the ECU is not erased or changed (the first server's sales are still figured into the total).

If you have more than 20 servers but they don't work at the same time, you may want to run a Clear Server Sales (Z) report for servers as they leave. You can also End Shift for servers. This clears the server's sales and frees the "slot" used to track the server's sales in the ECU, so the slot can be used by a new server.

Is it hard to keep track of and manage the keys?

The server ID feature isn't hard to manage—the way you use it depends on your security and accountability needs. It's the sole responsibility of the owner to handle and program the keys responsibly. You'll probably want to establish guidelines for picking up and returning the keys (You may want to keep them in an office and sign them out when a shift begins, or make servers responsible for their own keys at all times or some other convenient method.) Be sure to retain and disable any keys when a server leaves the business. You can re-program keys for new employees.

The attributes and restrictions you can assign to each key provide further management flexibility. For instance, you may want to set a daily expiration date on keys where loss or theft is a concern, or the server is temporary or in training. You may also want to limit the stations or dispensers where a server's key is valid.

What if a key is lost?

You can't disable the key if you don't have it to insert in the Datakey box. If there is an expiration date programmed on the key, the key is automatically disabled after that date. If you want to prevent access to your system with the missing key, you can change the server key code for your entire system and re-program all existing keys with the new code. Any key which is not re-programmed with the new code (including the missing key) is not valid on your system.

What about reports?

Infinity generates two different reports with server sales data: the Server Summary report and the Server Sales by Price Level report. When you clear server sales at the ECU, a Server Summary report is generated. For details about these reports, see the *Sample Reports* section. If you plan to run reports on server sales data, you'll want to make sure the sales for a server are not overwritten (if you have more than 20 servers) and always clear the server sales before clearing sales for the ECU.

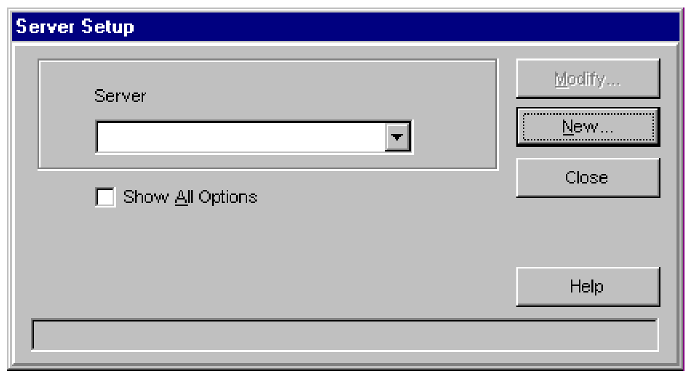
Add a Server

Before you can assign keys to your servers, you must add each server to your server list. To add a server to the list, you must enter a unique name and a unique ID number for the server. When you assign a key to the server, the ID number identifies the server to the ECU.

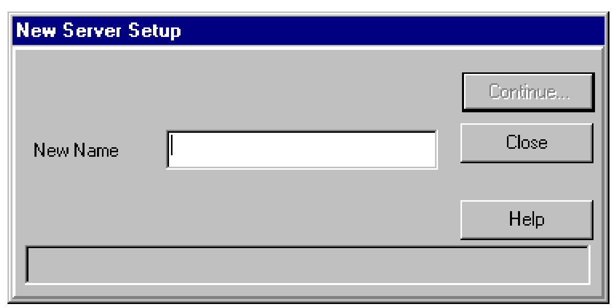
■ **To add a server:**

1. Run **Manager**.

2. Pull down the **Server ID** menu. Click **Server Setup...**.

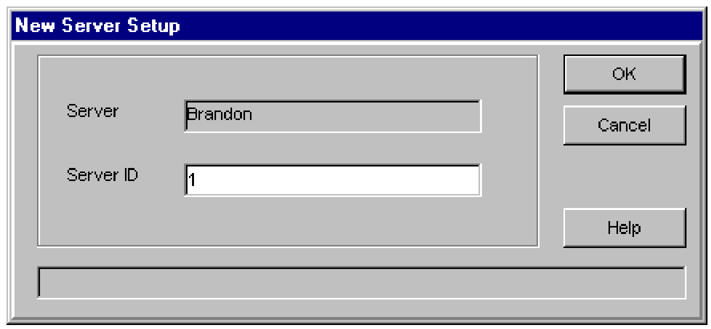


3. Click **New...**.



4. Type the **New Name** to add to the server list. The name can be up to 16 characters (letters or numbers).

5. Click **Continue...**.



6. View the **Server ID** number displayed for the server. If you want a different number for the server, type the new number.

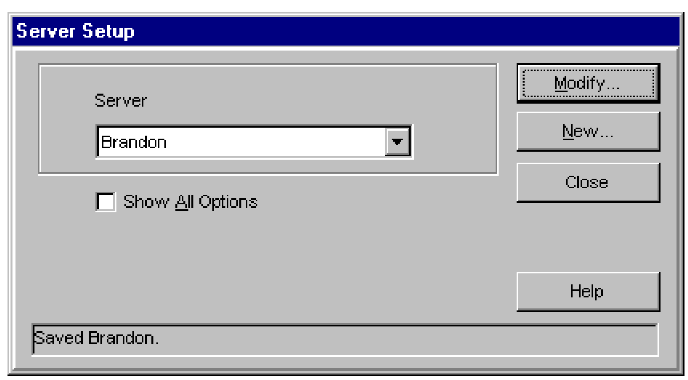
7. Click **OK** to save the server name and number and exit the screen or click **Cancel** to exit the screen without saving the server name or number.

8. Repeat steps 3 through 7 for every server you want to add.

9. Click **Close** to exit the **Server Setup** screen.

What is the Server ID number?

- The server ID number identifies the server to the ECU and must be unique for each server.
- Infinity keeps track of the ID numbers that have been assigned and automatically generates a new ID number for each server.
- You can change the ID number to another unique number (up to 99999) if you choose.
- You don't need to remember the ID numbers to perform future server operations. Servers are always identified by name in Infinity software (for assigning, reading and clearing keys, generating reports, etc.).



Note

- ❑ The server list is independent of the list of registered users (set up for password protection of **Infinity** software).

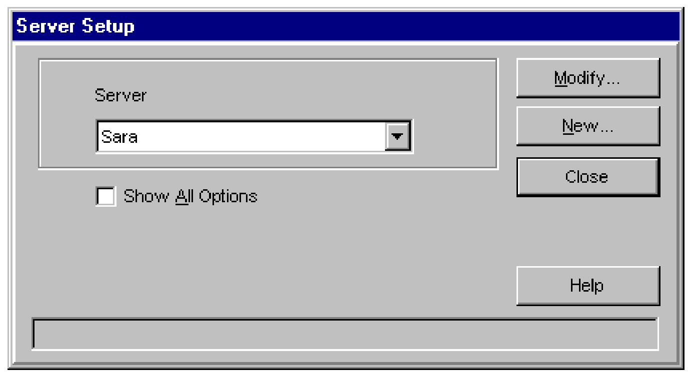
Modify a Server's ID Number

You can change a server's ID number if necessary. You may want to do this if you have ID numbers for your servers from another system (e.g., a POS system) and you want to use the same numbers for **Infinity**. The new number you give the server must not be used by any other server in the system.

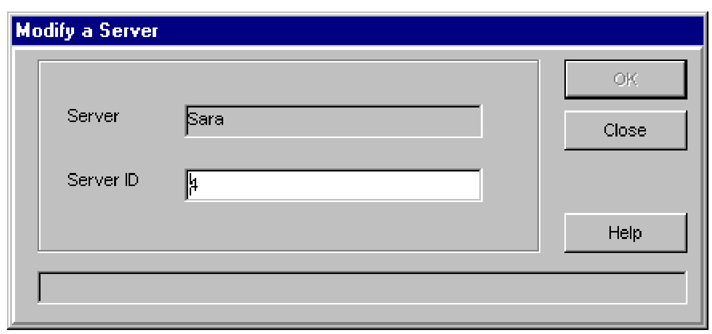
■ To modify a server's ID number:

1. Run **Manager**.

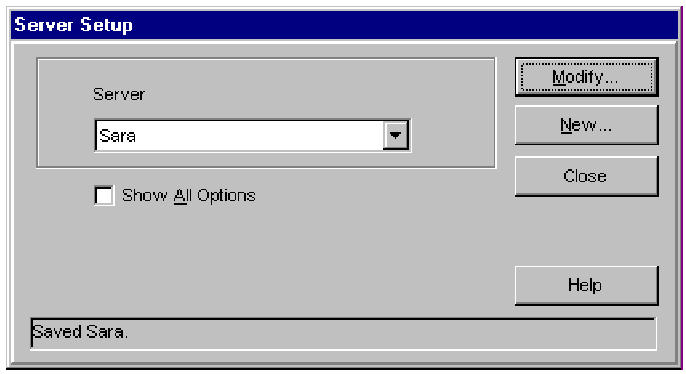
2. Pull down the **Server ID** menu. Click **Server Setup...**.



3. Select the **Server**.
4. Click **Modify...**.



5. Type the new **Server ID** number.



6. Click **OK** to save the number and exit the screen or click **Cancel** to exit the screen without saving the number.

7. Click **Close** to exit the **Server Setup** screen.

Notes

- ❑ The server ID number is not changed on the server's key until you insert the key in the programming box and modify the key. See *Assign or Modify a Server Key* in this section.

- ❑ It's a good idea to clear the server's sales before changing the server ID number. If you don't, any existing sales data with the old ID number appears on reports with the heading "Server #" (# is the ID number).

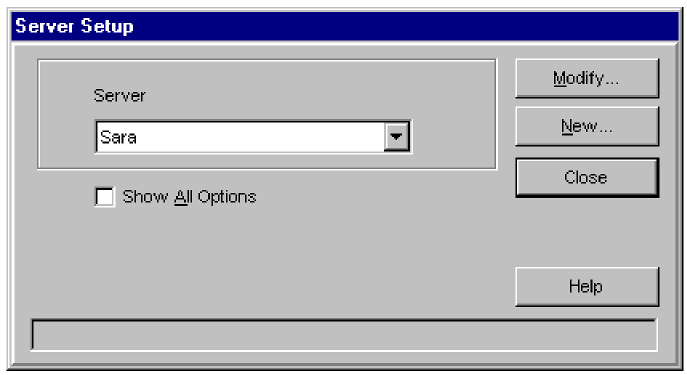
Rename a Server

Use this procedure if you want to change a server's name in the server list.

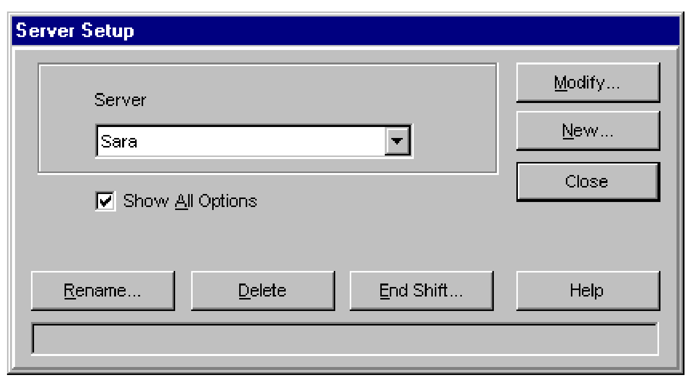
■ To rename a server:

1. Run **Manager**.

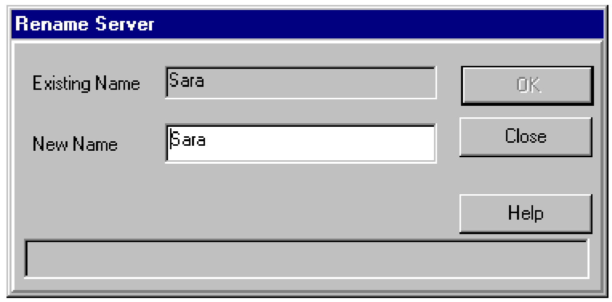
2. Pull down the **Server ID** menu. Click **Server Setup...**.



3. Select the **Server**.
4. Select **Show All Options**.



5. Click **Rename...**.



6. Type the **New Name** of the server. The name can be up to 16 characters (letters or numbers).

7. Click **OK** to save the server name and exit the screen or click **Cancel** to exit the screen without saving the server name.

8. Click **Close** to exit the **Server Setup** screen.

Notes

- ❑ The server's name is not changed on the server's key until you insert the key in the programming box and modify the key. See *Assign or Modify a Server Key* in this section.

- ❑ Renaming a server does not affect server sales data currently stored in the ECU since the data is stored by ID number. All sales data for the server will appear on reports under the new server name.

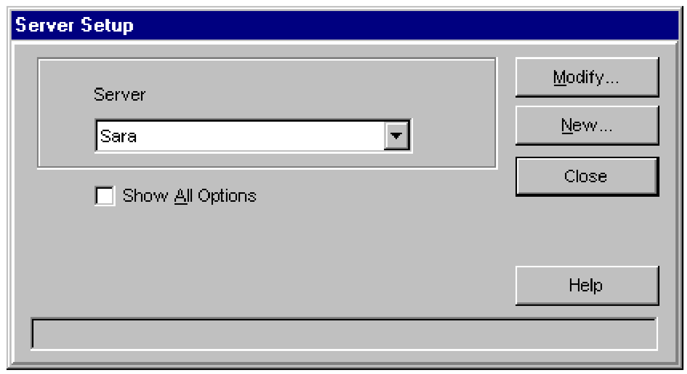
Delete a Server

If you make a mistake setting up your server list or if a server leaves the business, you can easily remove the server's name from the server list. The server's key should be retained and reprogrammed for use by another server.

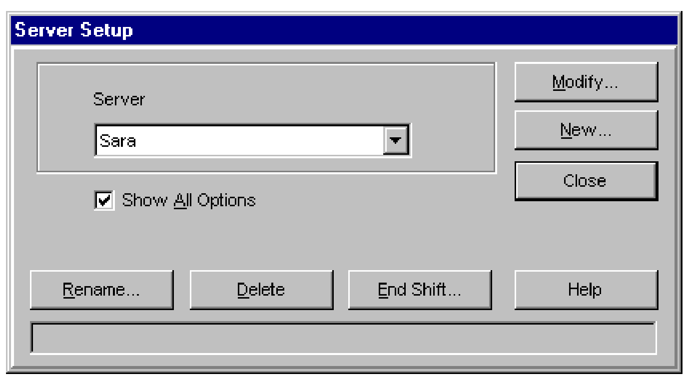
■ **To delete a server:**

1. Run **Manager**.

2. Pull down the **Server ID** menu. Click **Server Setup...**.

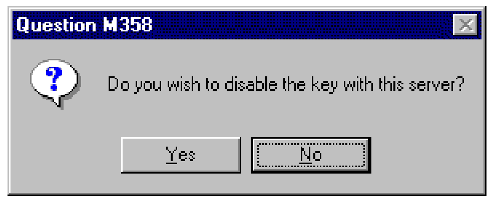


3. Select the **Server**.
4. Select **Show All Options**.

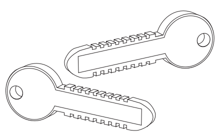


5. Click **Delete**.

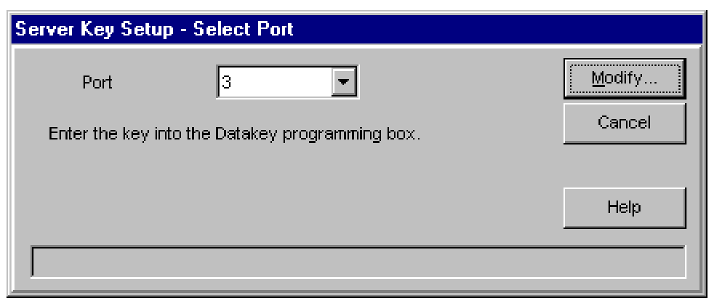
6. Click **Yes** to confirm deletion of the server or click **No** to cancel the deletion process.



7. To disable the deleted server's key, click **Yes**. (Click **No** if you don't want to disable the server's key at this time.)

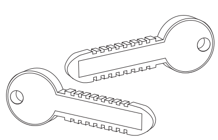


Insert the key into Datakey box.



Select the **Port** where the Datakey box is attached and click **Modify...**.

Wait for the key to be disabled.



Remove the key from the Datakey box.

8. Click **Close** to exit the **Server Setup** screen.

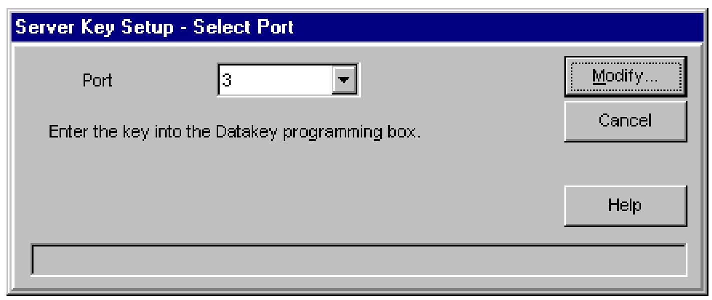
Assign or Modify a Server Key

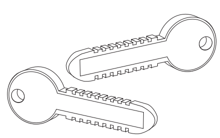
To assign or modify server keys you use a Datakey programming box (Berg PN 8009191) attached to a COM port at the computer. A server key must be inserted in the Datakey box and "programmed" for each server. Any time you want to modify the information programmed on the key you must reinsert the key and reprogram it. (If you're using a switchbox to switch between network operations and key operations, be sure to set the switch for key operations.)

■ To assign or modify a server key:

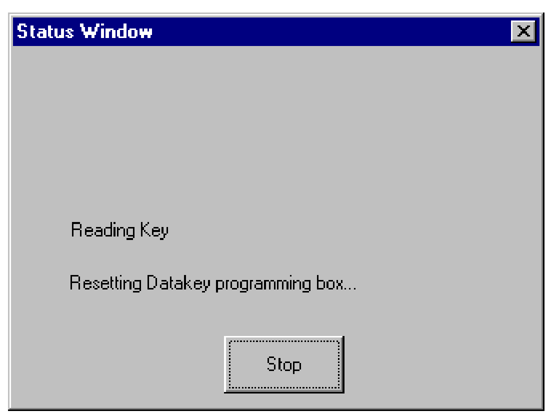
1. Run **Manager**.

2. Pull down the **Server ID** menu. Click **Server Keys Setup...**.





3. Select the **Port** where the Datakey programming box is attached.
4. Insert the key into the Datakey box.
5. Click **Modify...**.

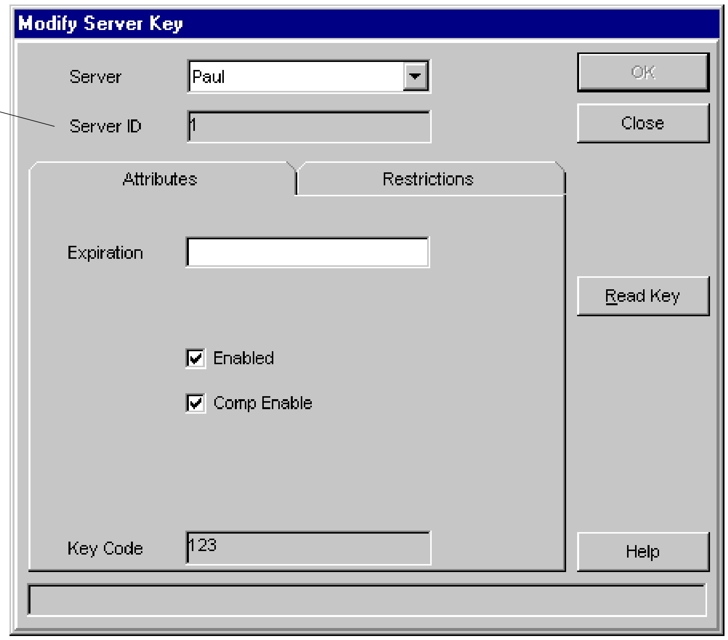


Wait for the computer to communicate with the Datakey box and read the key.

The Server ID number can't be changed from this screen. If you need to change it, see *Modify a Server's ID Number* in this section.

The values shown reflect the content of the key inserted. If there are irregular or illegal values on the key, a popup message shows the conflict and the field is replaced with a valid value.

- Key Code displays the server key code for the entire system. This code is programmed on each key you assign to a server. To change the key code, see *Set Server Key Code* in this section.



6. Select the **Server**.

7. Select the **Attributes** for the server's key.

   Expiration is the date through which the key is valid (e.g., 12/31/02). This feature is optional. If you don't want an expiration date programmed on the key leave this field blank.

   Select **Enabled** to enable the key for use in the system. If you don't select this option the key can't be used for pouring.

   Select **Comp** to enable complimentary pouring with the key.

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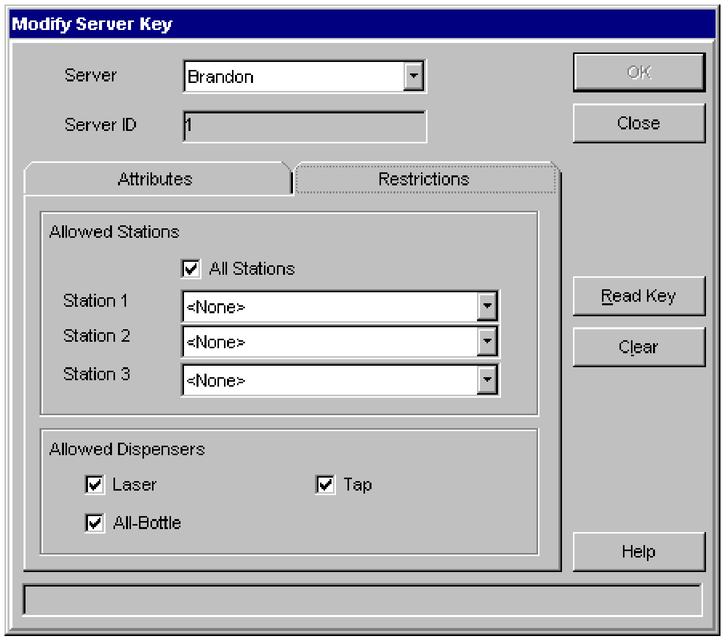


8. On the **Restrictions** tab, select the **Allowed Stations** and **Allowed Dispensers** for the key.

   Allowed Stations are the stations where you want the key to work. You can allow pouring at all stations or up to three individual stations. **All Stations** gives access to every station in your system. **Station 1**, **2** and **3** give access to the station(s) you select.

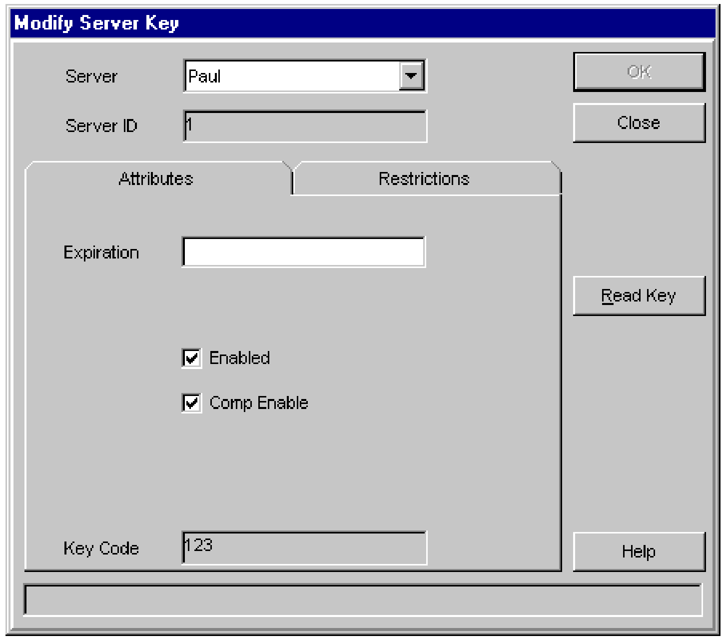
   Allowed Dispensers are the types of dispensers where you want the key to work. Choose from **Laser**, **All-Bottle** and **Tap** dispensers.

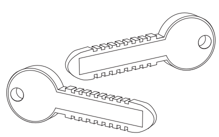
All-Bottle Dispensers

When you select All-Bottle as an Allowed Dispenser, it includes All-Bottle 7, All-Bottle 15 and All-Bottle ID.

9. Click **OK** to save the options and write them to the key in the Datakey box or click **Cancel** to exit the screen without saving any options.

   Wait while the computer communicates with the Datakey box.





10. Remove the key from the Datakey box. Tag or label the key with the server's name if you haven't already done so.

11. To assign another server's key, insert the next key into the Datakey box.

    Click **Read Key**. Wait while the key is read.

    Repeat steps 6 through 10.

12. Click **Close** to exit the **Modify Server Key** screen.

13. Click **Close** to exit the **Server Key Setup** screen.

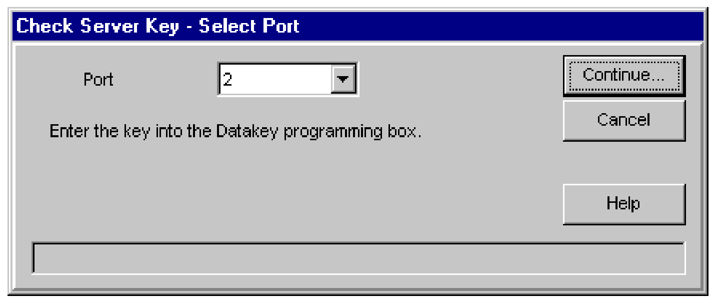
Check a Server Key

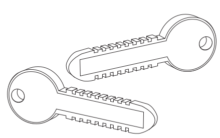
If a server key isn't working, use this feature to check the key's validity. You'll be able to see the key code programmed on the key and the attributes and restrictions assigned to the key. You can also check the server key against a particular ECU to see why the key won't work at that ECU.

■ To check a server key:

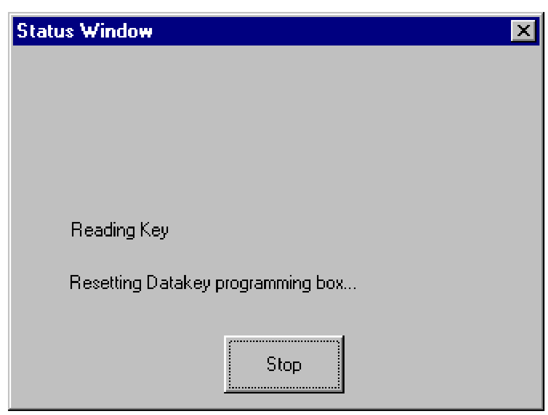
1. Run **Manager**.

2. Pull down the **Server ID** menu. Click **Check Server Key...**.



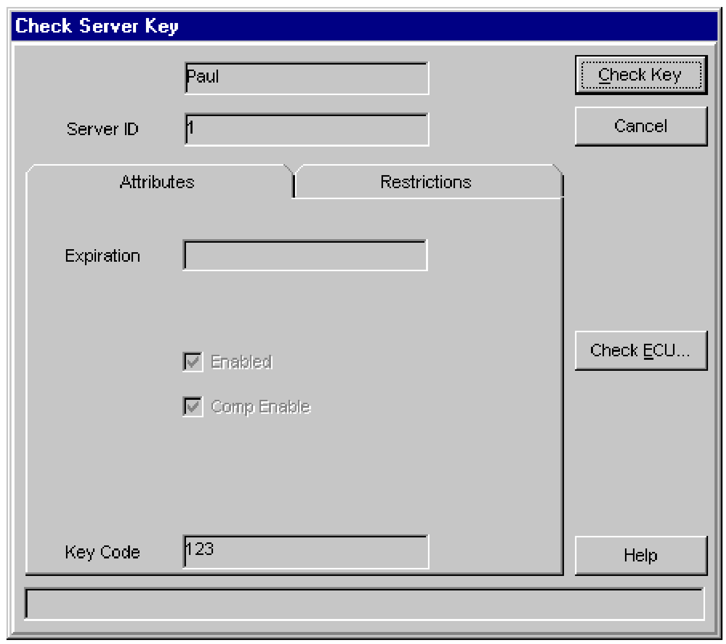


3. Select the **Port** where the Datakey box is attached.
4. Insert the key into the Datakey box.
5. Click **Continue...**.



Wait for the computer to communicate with the Datakey box and read the key.

6. Click **OK** after reading the message about the key's state.



You can't make any changes from this screen. If you want to make changes to the key see *Assign or Modify a Server Key* in this section.

The server name and ID number assigned to the key are displayed along with the attributes, restrictions and key code for the key.

7. To check the key's validity for a specific ECU click **Check ECU...**.

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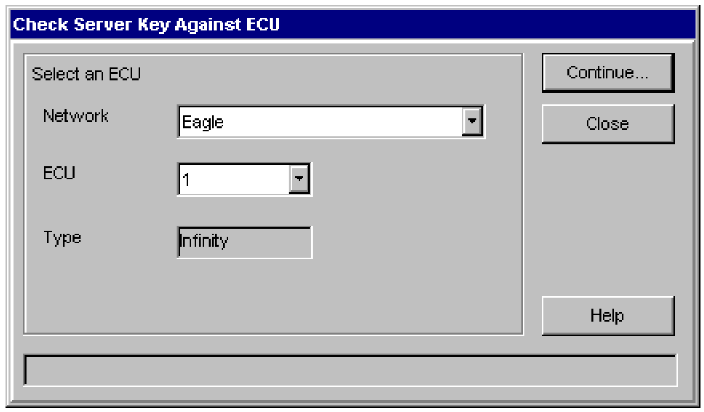
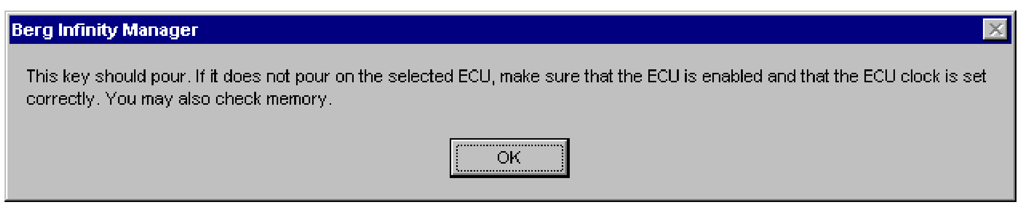


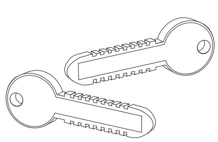
8. Select the name of the **Network**.

9. Select the **ECU** number.



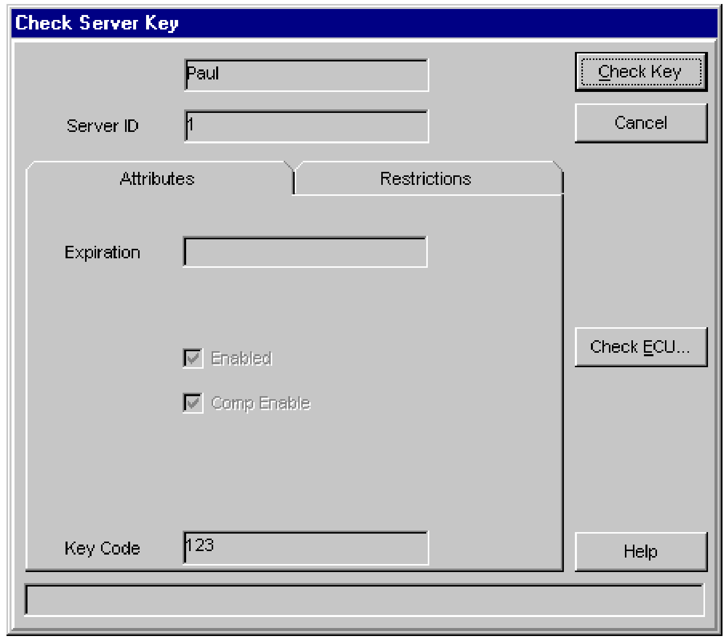
10. Click **Continue...**.

    The software checks the key's attributes against the specific ECU to see if the key is programmed to work at that ECU or if something is invalid. A message informs you of the results.



11. Remove the key from the Datakey box.

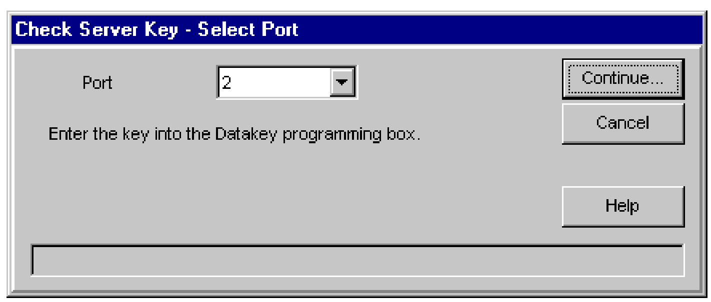
12. To read another key, insert the new key into the Datakey box.



13. Click **Check Key**. Wait for the new key to be read.

    Repeat steps 6-11.

14. Click **Cancel** to exit the **Check Server Key** screen.



15. Click **Cancel** to exit the **Check Server Key - Select Port** screen.

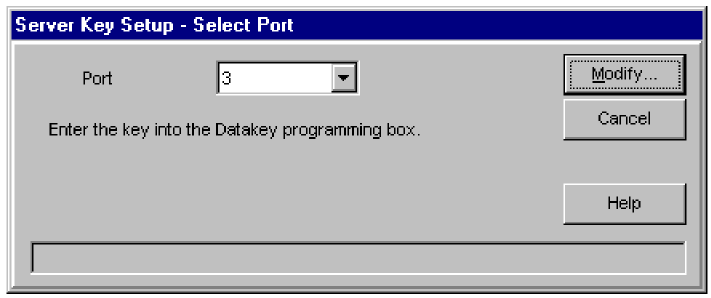
Disable a Server Key

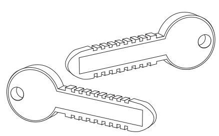
You can only disable a server key if you have it in your possession. You should retain and disable the keys of servers who leave the business.

■ To disable a server key:

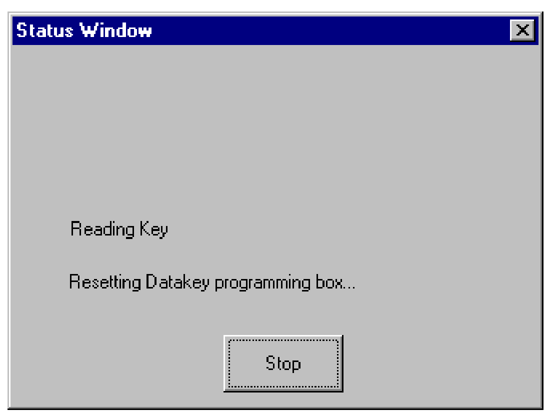
1. Run **Manager**.

2. Pull down the **Server ID** menu. Click **Server Keys Setup...**.

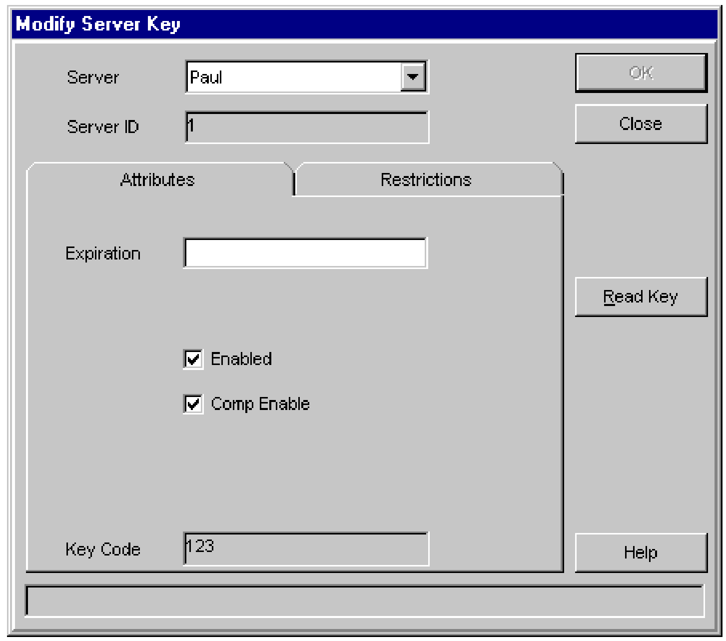




3. Select the **Port** where the Datakey box is attached.
4. Insert the key into the Datakey box.
5. Click **Modify...**.

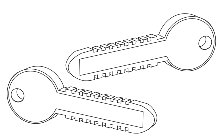


Wait for the computer to communicate with the Datakey box and read the key.



6. Click the **Enabled** check box. (An unchecked box signifies a disabled state.)

7. Click **OK** to exit the **Modify Server Key** screen.



8. Remove the key from the Datakey box. No one can pour drinks with the key until you enable it again.

9. Click **Close** to exit the **Server Key Setup** screen.

Notes

- ❑ Disabling the key does not change the name or ID number on the key. It just makes the key invalid at any of your stations.

- ❑ If you delete a server from your server list, you'll be prompted to disable the server's key.

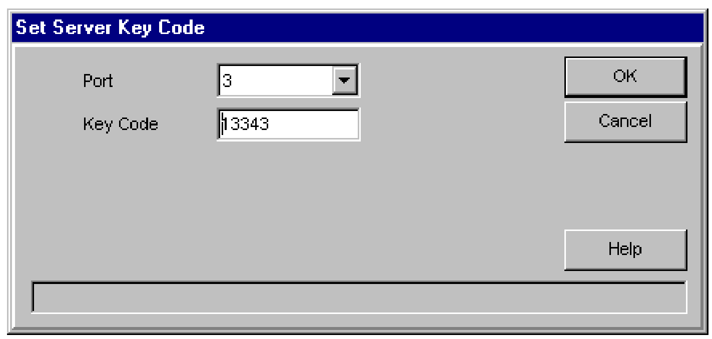
Set the Server Key Code

The server key code is the number you assign to your system that is programmed on every server key. It's like a password stamped on every key and recognized by every ECU in your system. You set this number initially on the Security Options screen when you install the software. You can change the server key code using the Server ID menu of the **Manager** program. Changing the server key code is the only way to prevent access to your system by a lost or stolen key (unless the key is expired). Perform this procedure when the system is not in use and you have all the keys in your possession.

■ To set the server key code:

1. Run **Manager**.

2. Pull down the **Server ID** menu. Click **Set Server Key Code...**.

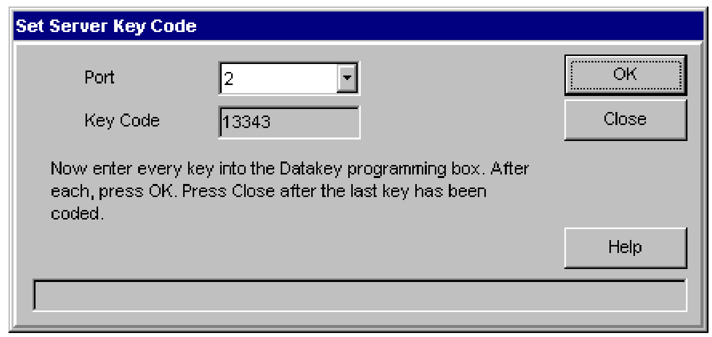


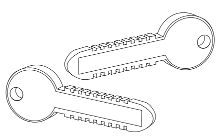
3. Select the **Port** where the Datakey box is attached.
4. Type the **Key Code** you want for your system. It can be any number from 0 to 65535.
5. Click **OK** to save the code.

   Wait while the code is communicated to the ECU(s).

What is the Server Key Code?

The server key code is any number you choose between 0 and 65535. The key code is used by the ECUs to determine if a key belongs to your system, thus preventing unwanted access. The server key code is programmed on each key you assign to a server and is the same for all keys in your system.





6. Insert a key into the Datakey box.
7. Click **OK**.

   Wait for the new key code to be written to the key.
8. Remove the key from the Datakey box.
9. Repeat steps 6 through 8 for every key.
10. Click **Close** to exit the **Set Server Key Code** screen.

Note

❑ If you forget a key it will not work in the system. You can update the key later by using the procedure in *Assign or Modify a Server Key* in this section. Anytime you update any information for a key, the key code is updated to the most recent value.

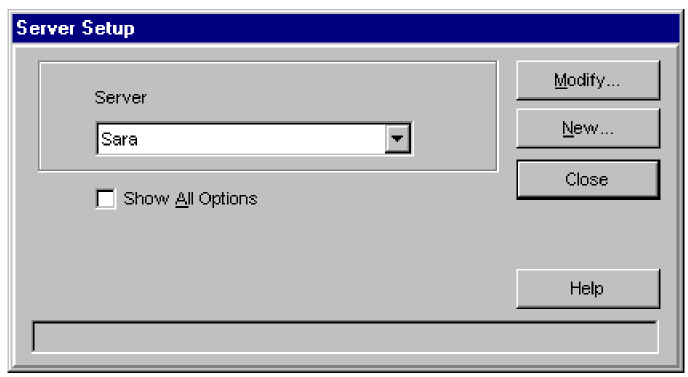
End Shift for a Server

End Shift lets you clear a server's sales data and name from a station or group. Clearing the sales with End Shift does not generate a report. This feature is useful if you have more than 20 servers and you want to clear a server's specific slot (for tracking sales) at the ECU. If you have more than 20 servers and you don't clear any servers' sales, the 21st server's sales overwrite the sales of the server that has been pouring the longest. You can End Shift for the server that is leaving and the 21st server's sales are recorded in the now empty slot. This clears the server's sales at the ECU so you may want to run a Server Summary report (in the **Report** program) first.

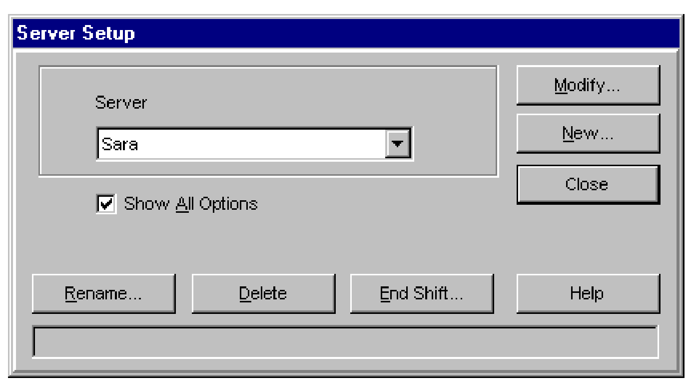
■ To end shift for a server:

1. Run **Manager**.

2. Pull down the **Server ID** menu. Click **Server Setup...**.



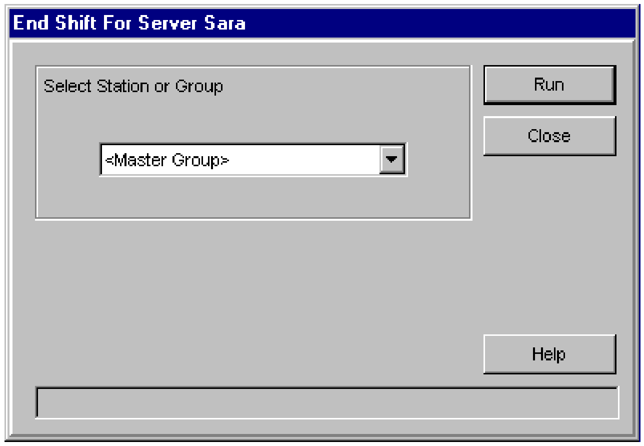
3. Select the **Server**.
4. Select **Show All Options**.



5. Click **End Shift...**.

Server Limit with Partitions

If you divide a TAP 1 ECU into more than 4 partitions, the number of servers whose sales are tracked (at any given time) is reduced from 20 per partition to 10 per partition.



6. Select the **Station** or **Group** from which to clear the server's name and sales.

7. Click **Run** to communicate the end shift message to the ECU(s).

   Wait for the communication with the ECU(s) to occur. A message informs you when the end shift is complete.

8. Click **Close** to exit the **End Shift for Server** screen.

9. Click **Close** to exit the **Server Setup** screen.

SECTION 15

Inventory

Infinity's Inventory feature uses volume data generated by the ECUs to keep track of stock amounts and help determine which products should be ordered. It allows you to print orders for each supplier and provides a place to enter delivery amounts, thus helping you keep a reliable account of your **Infinity** inventory. This section provides help with the following tasks:

Inventory Overview

What is Inventory?

Inventory is **Infinity's** stock-tracking feature that helps you streamline and automate your inventory and ordering tasks. Each time you Archive and Clear Sales, the drink volume recorded by the ECUs is available at the computer for running an Inventory Check. Inventory Check uses the volume data that's been archived to calculate the reduction in inventory that has occurred. Because Inventory also lets you enter the actual stock on hand, you can easily review the amount of any product loss for each brand. In addition, once you've set up a minimum amount of stock you want on hand for a brand (its "order point"), **Infinity** can let you know when it's time to re-order. You can point and click to generate an order and print it right from **Infinity's** Report program. When the order is delivered, simply verify the delivery amounts and **Infinity** adjusts your electronic inventory accordingly.

Which brands does Inventory track?

Inventory tracks any brand in your **Infinity** brand list that has a supplier. However, Berg recommends not assigning a supplier to brands assigned to All-Bottle-7 and All-Bottle-15 codes unless a single brand is assigned to a single code, e.g., "Irish Cream". (Since multiple brands are typically dispensed under each All-Bottle code, e.g., "Well" or "Call", Inventory is generally not useful for these dispensers.) Any product not dispensed by Berg equipment can't be included since only the volume data generated at an ECU is used to track product.

Initial Setup

An Inventory menu appears in both **Manager** and **Report** once you enable the feature in Configuration Options. Several Inventory setup tasks should be performed after other **Infinity** setup tasks (including calibration) are completed. See *Inventory Setup Checklist* in this section for a complete setup guideline.

Physical Inventory

You'll still need to take a physical inventory of your stock at regular intervals if you want to have the most accurate picture of overall product cost and loss. **Infinity** provides a place to enter the numbers from your physical inventory so the stock amounts will be accurate in the software. See *Inventory Check* in this section for help with entering these numbers.

Product Loss

Whenever you enter physical inventory amounts, **Infinity** can compare those amounts with the amounts from the ECUs' volume data and determine the difference (or product lost). You can run a Cost Analysis report showing the volume of lost product and the retail value of that loss for each brand. See *Reports* in this section or *Cost Analysis Report* in the *Sample Reports* section.

Generating Orders

To generate an order using the Inventory feature, you must first run an Archive and Clear Sales report and then an Inventory Check. This gives **Infinity** a chance to calculate how much your stock has been reduced. You can then adjust **Infinity's** stock amounts using numbers from your own physical inventory. Finally, Inventory helps you select which brands need ordering and you can save and print the order. See *Inventory Check* and *Orders* in this section.

Deliveries

It's important to record all the items received so Inventory can keep an accurate count of your stock. Inventory displays the amount you ordered and you can either accept that number or enter a different number if the delivery doesn't match the order. See *Deliveries* in this section.

Reports

Inventory includes three reports: Current Stock, Cost Analysis and Brand Order. These reports can be run using the Advanced Reporting menu or the Inventory menu. See *Reports* in this section.

Schedule

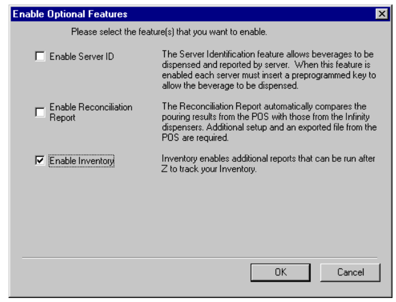
You can run Inventory Check using an **Infinity** schedule once the Inventory feature is enabled. (It will be performed on the Master Group.) Typically, an Archive and Clear Sales report should precede the Inventory Check in the schedule. (You can't adjust inventory amounts, order points, order quantity or order cost while the schedule is running, so set them up correctly before the schedule runs.) Any brands with stock amounts below their order points are automatically included in the order generated. See the *Schedules* section for help creating a schedule.

Inventory Setup Checklist

Follow this sequence of steps to set up **Infinity's** inventory tracking feature.

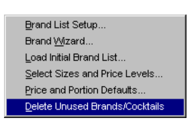
■ To set up Inventory:

1. Enable the Inventory feature when you install the software or by accessing Configuration options. See *Enable Inventory* in the *Configuration Options* section.



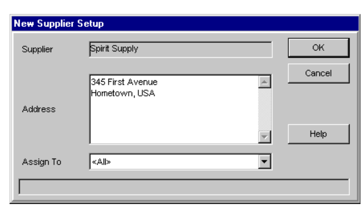
2. If you use the Brand Wizard, select a **Container** for each product type and enter a default **Order Point** for all brands. (The order point is the minimum number of containers you want on hand before you reorder.)

3. Perform all other **Infinity** setup tasks (ECUs, brand and cocktail assignments, etc.) Calibrate all dispensers. See the *Network and ECU Setup*, *Brands, Cocktails, Prices and Portions* and *Calibration* sections in this manual.

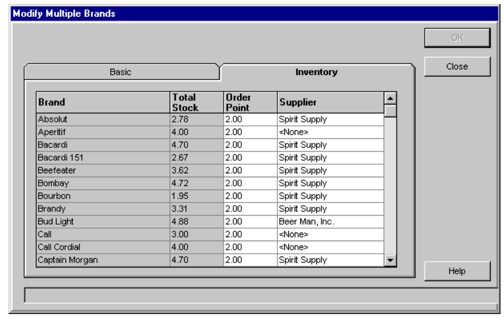


4. Delete unused brands and cocktails from your brand list. See *Delete Unused Brands and Cocktails* in the *Brands, Cocktails, Prices and Portions* section.

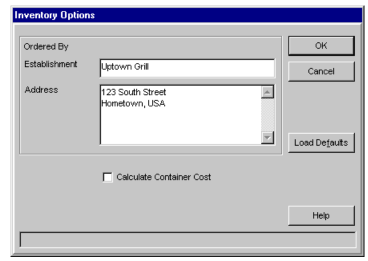
5. Set up your suppliers. See *Supplier Setup* in this section.

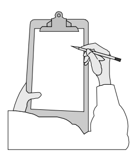


6. Set up ordering information for each brand. See *Brand List Setup* in this section.

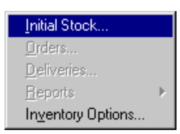


7. Enter Inventory options. See *Inventory Options* in this section.

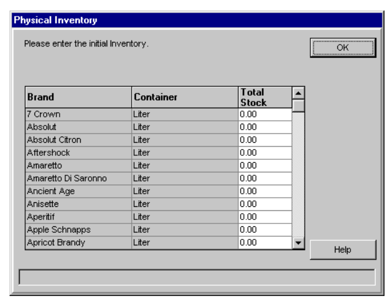




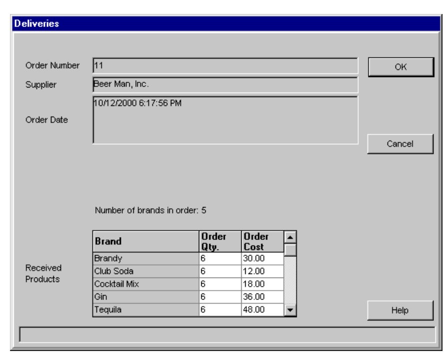
8. Perform a physical inventory and record the number of containers on hand for each brand.



9. Run Initial Stock. It will prompt you to Archive and Clear Sales so any recorded pours can be cleared before you enter stock amounts. Then it will prompt you to enter initial stock amounts (from your physical inventory) for each brand. See *Initial Stock* in this section.



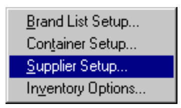
10. Inventory is now set up and ready to use. At regular ordering intervals, perform an Inventory Check to assess stock amounts and adjust as needed before generating orders. Promptly enter all deliveries received.



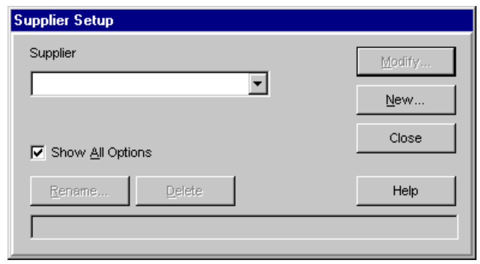
Supplier Setup

Supplier setup information includes the supplier's name and address.When you create a new supplier, you can assign it to a product type or to all brands. Each brand can only have one supplier. Any brands in your list without a supplier are not included in Inventory.

To set up a new supplier:

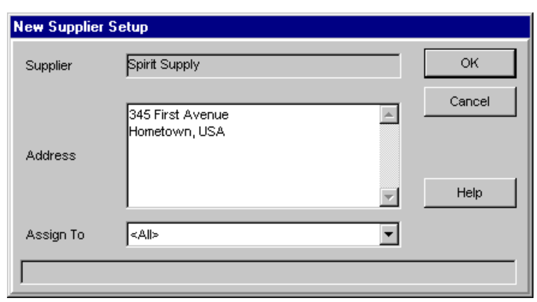


1. Run **Manager**.
2. Pull down the **Inventory** menu and click **Supplier Setup....**.



3. Click **New...**.

4. Type the **New Name** of the supplier and click **Continue...**.



5. Type the **Address** of the supplier (as you want it to appear on printed orders).
6. If you want to assign this supplier to a product type, select the product type in the **Assign To** field. All brands in the product type receive the supplier assignment (even if they already have a supplier assignment). Select **<All>** to assign this supplier to all brands.
7. Click **OK**.

Brand List Setup

- Use Brand List Setup to assign different suppliers to brands of the same product type or to assign the same supplier to brands of two or more (but not all) product types.

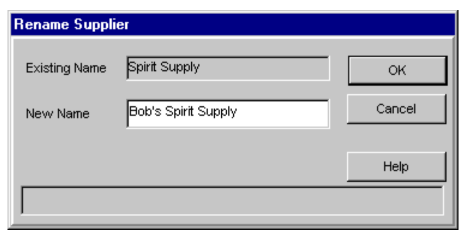
■ To modify an existing supplier's address:

1. Select a **Supplier** to modify.
2. Click **Modify...**.

3. Type the **Address**.
4. Click **OK**.

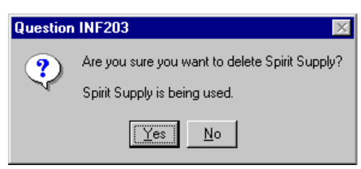
■ To rename or delete a supplier:

1. Select **Show All Options**.
2. Click **Rename...**.
3. Type in the **New Name** of the supplier and click **OK**.



OR

2. Click **Delete**.



3. Click **Yes**.

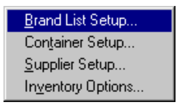
   If you delete a supplier already assigned to a brand a prompt reminds you. Click **Yes** to delete the supplier or **No** to keep it. If you proceed with the deletion, any brands with the supplier assignment will automatically be assigned the first remaining supplier in the supplier selection list.

Brand List Setup

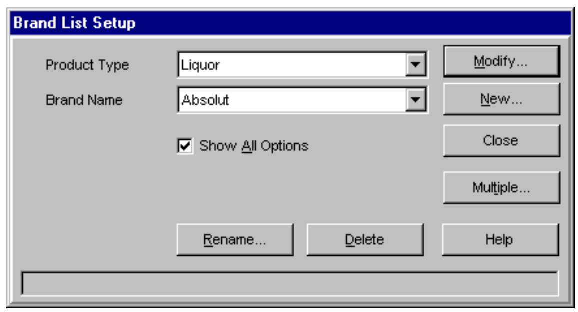
To use Inventory, each brand must be set up with container, supplier and ordering information. In Brand Wizard, you already defined default containers per product type and a default order point for all brands. In supplier setup, you assigned a supplier to selected product types. You need to verify those default entries and also enter container costs and retail prices for each brand.

■ To use Brand List Setup for Inventory:

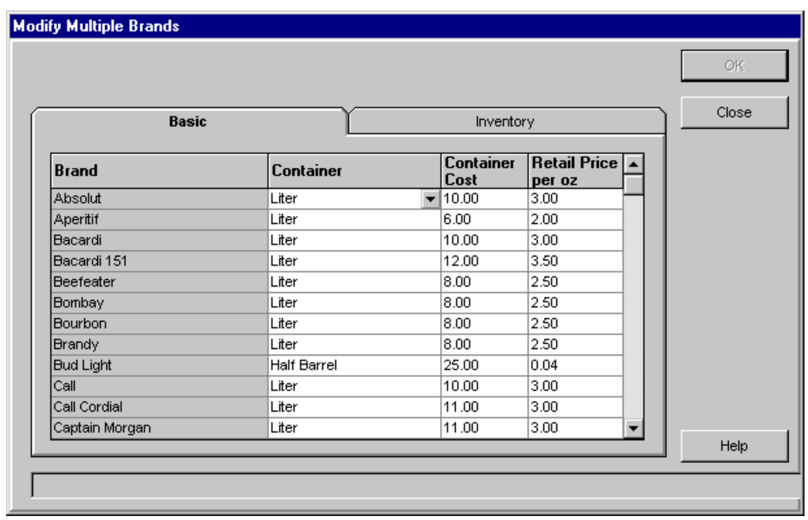
1. Run **Manager**.



2. Pull down the **Inventory** menu and click **Brand List Setup...**.



3. Click **Multiple...**.



4. On the **Basic** tab, select a **Container**, type the **Container Cost** and **Retail Price**.

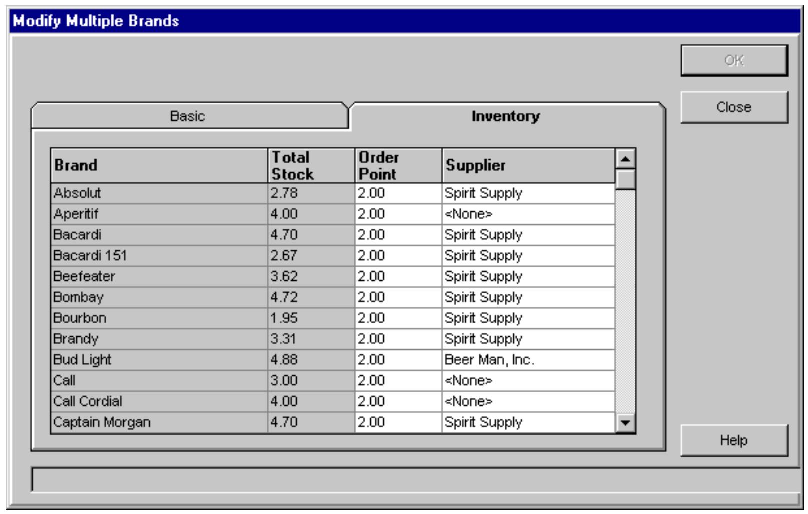
   Container is the name of the container the brand comes in.

Container Setup

To define a new container or modify a container's size, see *Container Setup* in the *Brands, Cocktails, Prices and Portions* section.

Container Cost is the cost (to you) of each container of the brand. It's also used on both Inventory and Usage reports.

Retail Price is the retail price the customer pays for each unit of measure of the brand. It's used to calculate stock value on the Container Stock report and to calculate retail value on the Cost Analysis report, the Retail Usage report and the Reconciliation report.



Brand	Total Stock	Order Point	Supplier
Absolut	2.78	2.00	Spirit Supply
Aperitif	4.00	2.00	<None>
Bacardi	4.70	2.00	Spirit Supply
Bacardi 151	2.67	2.00	Spirit Supply
Beefeater	3.62	2.00	Spirit Supply
Bombay	4.72	2.00	Spirit Supply
Bourbon	1.95	2.00	Spirit Supply
Brandy	3.31	2.00	Spirit Supply
Bud Light	4.88	2.00	Beer Man, Inc.
Call	3.00	2.00	<None>
Call Cordial	4.00	2.00	<None>
Captain Morgan	4.70	2.00	Spirit Supply

5. On the **Inventory** tab, type the **Order Point** and select a **Supplier** (if necessary).

   Order Point is the minimum number of containers of the brand you want in your total stock. When the number of containers falls below the order point, Inventory flags the brand to let you know it's time to re-order. This can be a partial container amount (up to two decimal points).

   > Supplier Assignment
   >
   > You must assign a supplier to every brand you want to include in Inventory.

   Supplier is the name of the supplier of the brand. Select **<None>** as the supplier for brands not included in Inventory (e.g., All-Bottle-7 and All-Bottle-15 brands).

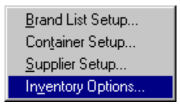
   (**Total Stock** is entered when you set up a new brand or in Inventory Check.)

6. Click **OK** to save your brand list setup on both tabs. Click **Cancel** to exit the screen without saving.

7. Click **Close** to exit the **Brand List Setup** screen.

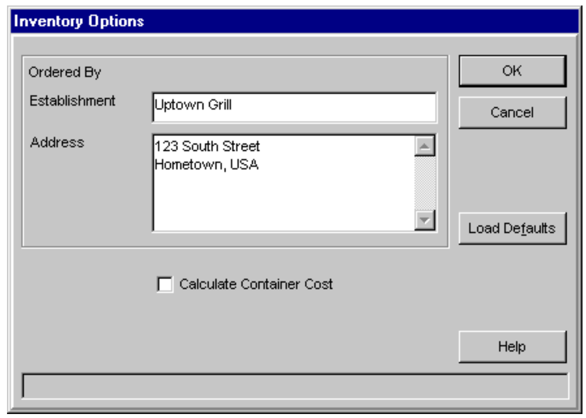
Inventory Options

In Inventory Options, you enter the name and address of your establishment for printed orders.



■ To enter Inventory Options:

1. Run **Manager** or **Report**.
2. Pull down the **Inventory** menu and click **Inventory Options...**.



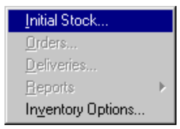
3. Type your **Establishment** name and **Address** (to be printed on orders).
4. Check **Calculate Container Cost** if you want Inventory to recalculate the container cost for each brand in an order based on its order cost. (If your order cost changes frequently, you may not want to select this option, but keep the container cost entered in Brand List Setup.)
5. Click **OK** to save your entries and exit. Click **Cancel** to exit the screen without saving.

Initial Stock

You must enter the initial number of containers on hand for each brand as part of Inventory setup. Your stock amounts should include all containers, both behind the bar and in the storeroom.

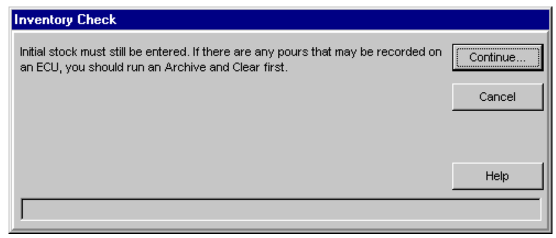
■ To enter initial stock:

1. Run **Report**.

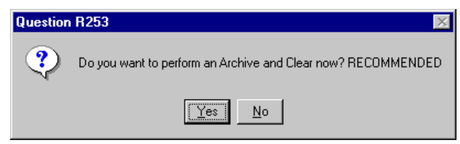


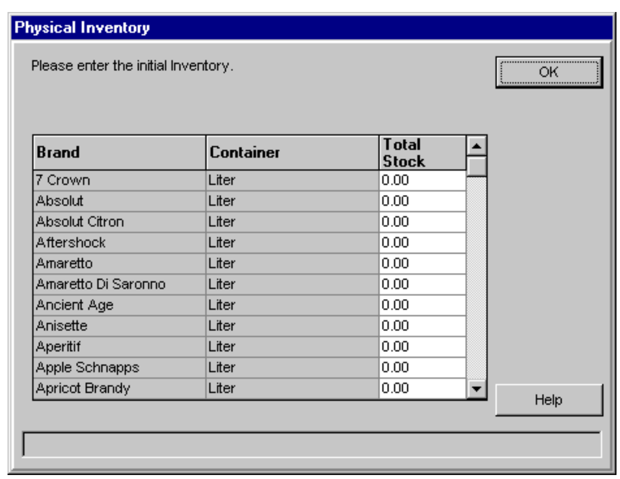
2. Pull down the **Inventory** menu and click **Initial Stock....**.

3. Click **Continue...** after reading the note about clearing sales.



4. Click **Yes** to Archive and Clear Sales if you've poured any drinks since your last Archive and Clear Sales. Wait for the report to run. View, save and/or print the report and click **Close** to exit the **View** screen.





Supplier Assignment

Brands without an assigned supplier will not appear in this inventory list.

5. Type your current stock amounts for each brand in the **Total Stock** column. This includes containers behind the bar and in the store room. Partial container amounts can be entered up to two decimal places.

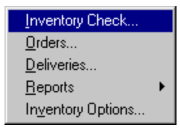
6. Click **OK**. If you leave any stock amounts at zero, a prompt reminds you.

Inventory Check

Inventory Check uses only volume data that's been archived at the computer to adjust inventory. It also provides a chance to enter stock amounts from your physical inventory before generating orders. To calculate volume lost, you must take a physical inventory. However, you can run inventory check without doing a physical inventory to review stock amounts and generate orders.

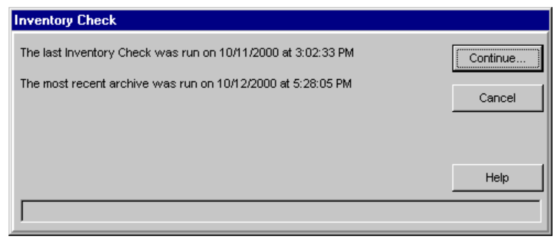
■ To run Inventory Check:

1. Run **Report**.

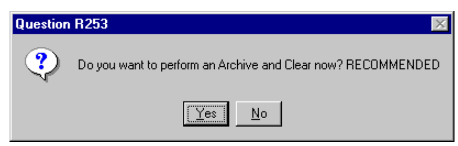


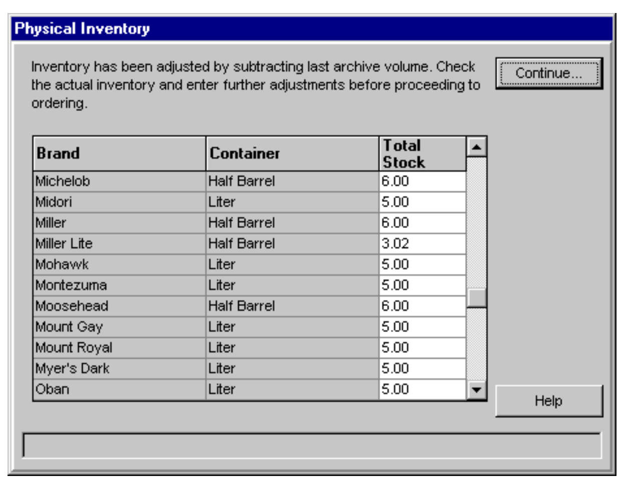
2. Pull down the **Inventory** menu and click **Inventory Check.....**

3. Click **Continue...** after reviewing the dates of the most recent archive and inventory check.



4. Click **Yes** to Archive and Clear Sales if you've poured any drinks since your last Archive and Clear Sales. Wait for the report to run. View, save and/or print the report and click **Close** to exit the **View** screen.





5. If you've performed a physical inventory, type any adjusted stock amounts in the **Total Stock** column. This includes containers behind the bar and in the store room. Partial container amounts can be entered up to two decimal places.

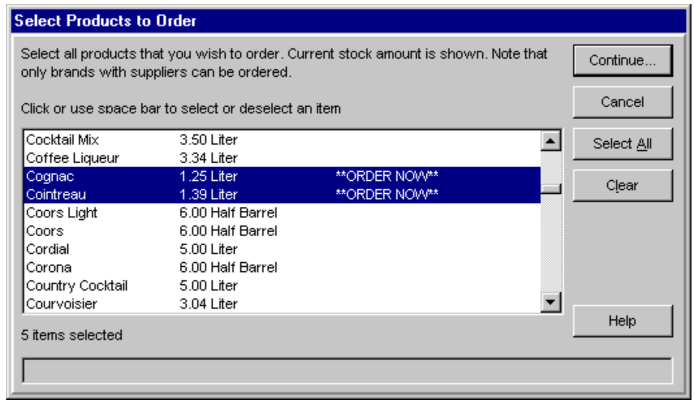
Archive and Clear Sales (Z)

- Infinity uses volume data from the Archive and Clear Sales report to calculate the reduction in stock amounts for each brand.
- If you haven't cleared sales since your last Inventory Check, you are prompted to do so before proceeding.
- If you've cleared sales more than once since your last Inventory Check, Infinity uses combined volume data from all of those Archive and Clear Sales reports to determine stock reduction.

Calibration Pours

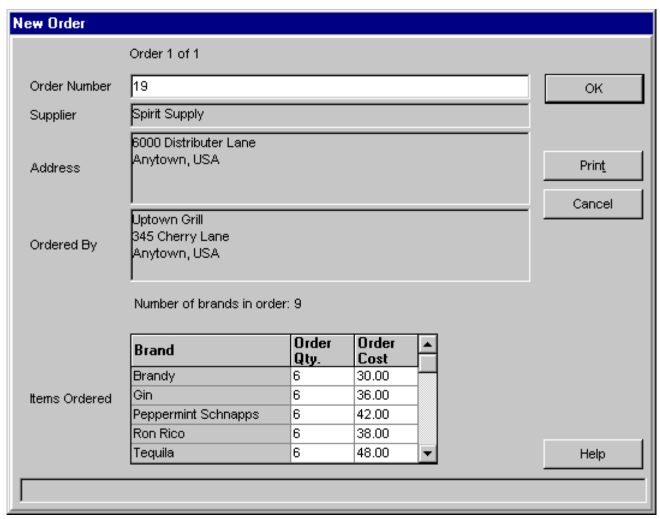
- Calibration pours aren't included in the volume amount in the Archive and Clear Sales report. If you've made any calibration pours since your last Archive and Clear Sales, adjust your physical inventory amounts to account for the calibration pours.

6. Click **Continue...**. If you leave any stock amounts at zero, a prompt reminds you.



7. Add or remove brands from the order by clicking or using the space bar. Brands with a total stock number below the order point are already highlighted and include the tag "ORDER NOW". Click **Continue...**.

8. Type a new **Order Number** if desired. Successive order numbers are automatically generated.



9. Type the **Order Quantity** for each brand. Once you enter a quantity for a brand, it's remembered for future orders .

10. Type the **Order Cost** for each brand. Once you enter a cost, it appears on every order until you change it.

11. Click **Print** to print a copy of the order.

12. Click **OK** to save the order and exit.

    OR

    If you're ordering brands from more than one supplier, click **Next** and repeat steps 8-12 for each order.

Order Cost

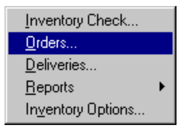
- If you checked Calculate Container Cost on the Inventory Options screen, any order cost you enter here will be divided by the order quantity to determine a new container cost for the brand.
- If you didn't check Calculate Container Cost, the order cost has no effect on the container cost.

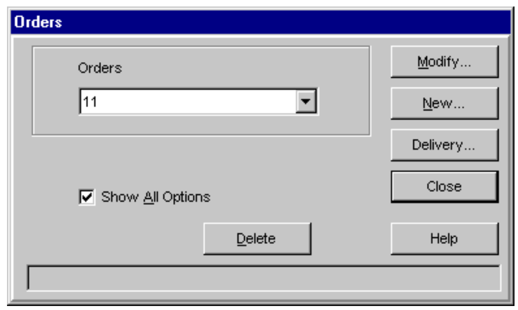
Orders

You can modify or delete any existing orders. When you create a new order, Inventory Check prompts you to run an Archive and Clear Sales report and then adjusts all stock amounts using volume data from the report.

■ To create a new order:

1. Run **Report**.
2. Pull down the **Inventory** menu and click **Orders...**.





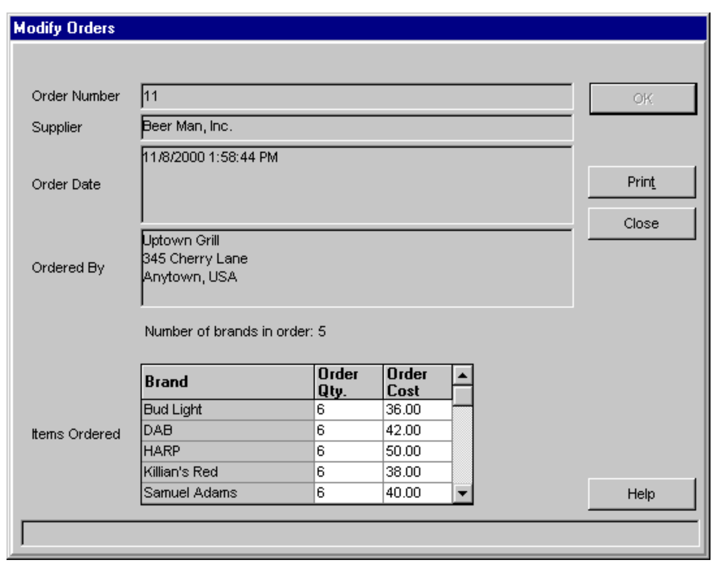
3. Click **New...**.
4. Follow steps 3-14 of *Inventory Check* in this section.

Deliveries...

Click the Deliveries... shortcut button to enter quantities delivered. Follow the steps outlined in *Deliveries* in this section.

■ To modify an existing order:

1. Select an **Order** number to modify.
2. Click **Modify...**.



Remove Items

Type in an Order Quantity of zero to remove any item from the order.

3. Type a new **Order Quantity** or **Order Cost** for the desired brand(s).

4. Click **Print** to print a copy of the order.

5. Click **OK** to save any changes and exit. Click **Close** to exit if you haven't made changes.

Supplier
Beer Man, Inc.
5000 Distributor Lane
Anytown, USA

Ordered By
Uptown Grill
345 Cherry Lane
Anytown, USA

Order Number
11

Order Date
11/8/2000 1:58:44 PM

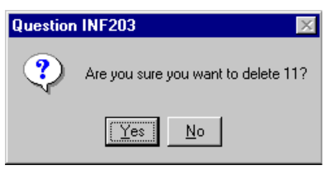
Page 1 of 1

Brand	Order Qty.	Order Cost
Bud Light	6	36.00
DAB	6	42.00
HARP	6	50.00
Killian's Red	6	38.00
Samuel Adams	6	40.00
		206.00

■ To delete an order:

1. Select **Show All Options**.

2. Click **Delete**.



3. Click **Yes**.

4. Click **Close** to exit the **Orders** screen.

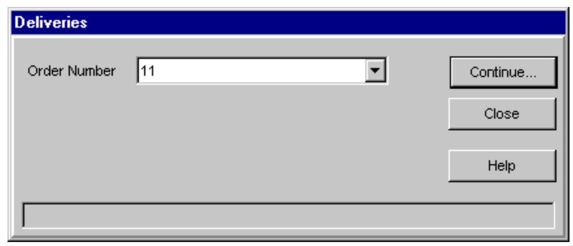
Deliveries

Whenever stock is added to your inventory, you should enter the container quantities using the Deliveries menu option.

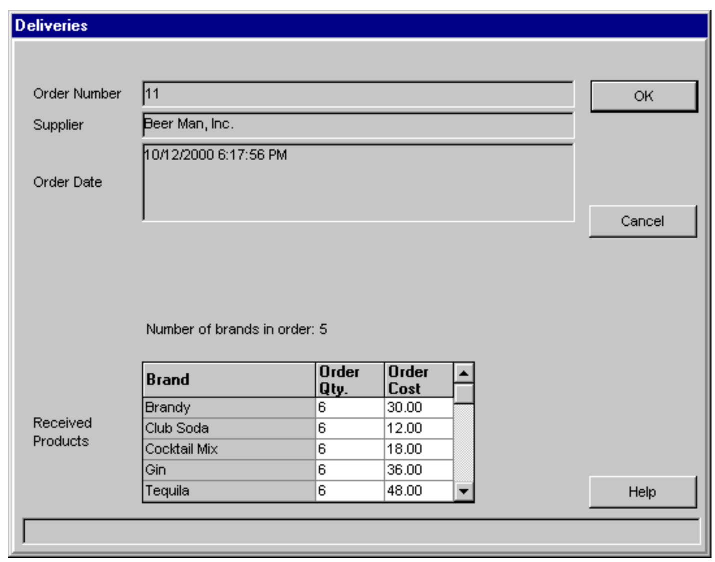
■ To enter deliveries:

1. Run **Report**.

2. Pull down the **Inventory** menu and click **Deliveries...**.



3. Select the **Order Number** of the delivery and click **Continue...**.



> **Incomplete Deliveries**
>
> If you don't receive a brand listed on the order, enter zero for its order quantity. This cancels the order for that brand. If the brand is expected at a later date, create a new order for the brand.

4. Type in a new **Order Quantity** if the delivery quantity differs from the order.

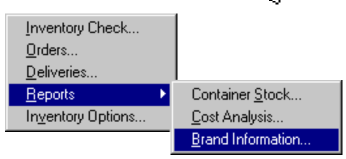
5. Type in a new **Order Cost** if the invoice reflects a different cost.

6. Click **OK** to accept the delivery with the amounts shown. This adds the received containers to the total stock and removes the order from the system.

7. Click **Close** to exit the **Deliveries** screen.

Reports

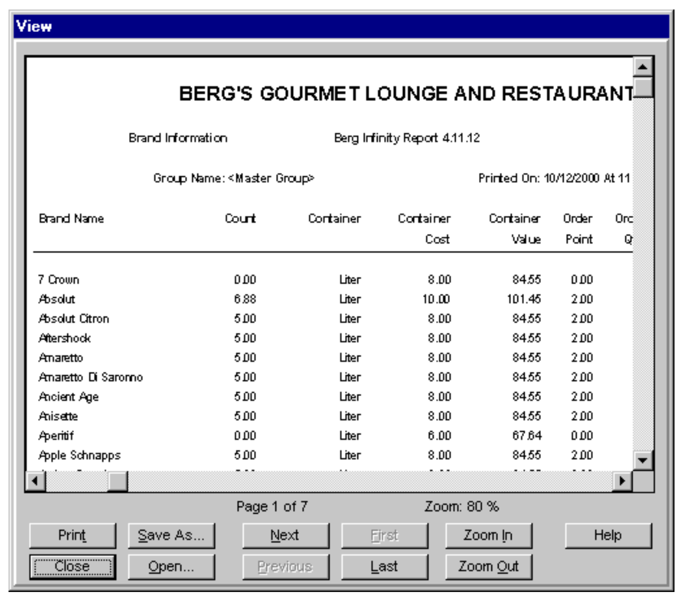
All Inventory reports can be run from the Inventory menu or the Advanced Reporting menu. Inventory reports are only run on the data from the most recent Inventory Check. They can't be run on data in the ECU or by archive dates.



■ To run Inventory reports:

1. Run **Report**.
2. Pull down the **Inventory** menu and point to **Reports**. Click the report name.

   Wait for the report to run.



3. Click **Print** to print the report.
4. Click **Save As...** to save the report.
5. Click **Close** to exit.

> Sample Reports
>
> *See Container Stock Report, Cost Analysis Report or Brand Information Report* in the *Sample Reports* section for further explanation of each report.

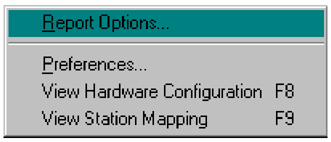
SECTION 16

Reports

Infinity collects sales data from each ECU and calculates totals by station or group. This data can be reviewed on screen and/or on paper to help monitor inventory, track daily operations and identify potential problems. **Infinity** provides a broad range of reports to permit review of data from different perspectives. See the *Sample Reports* section for an example of each **Infinity** report. See the *Reconciliation and Variance Reports* section for help with reports that compare sales terminal data with **Infinity** data. You can also set up a schedule to run **Infinity** reports at specific intervals. See the *Schedules* section. This section provides help with the following tasks:

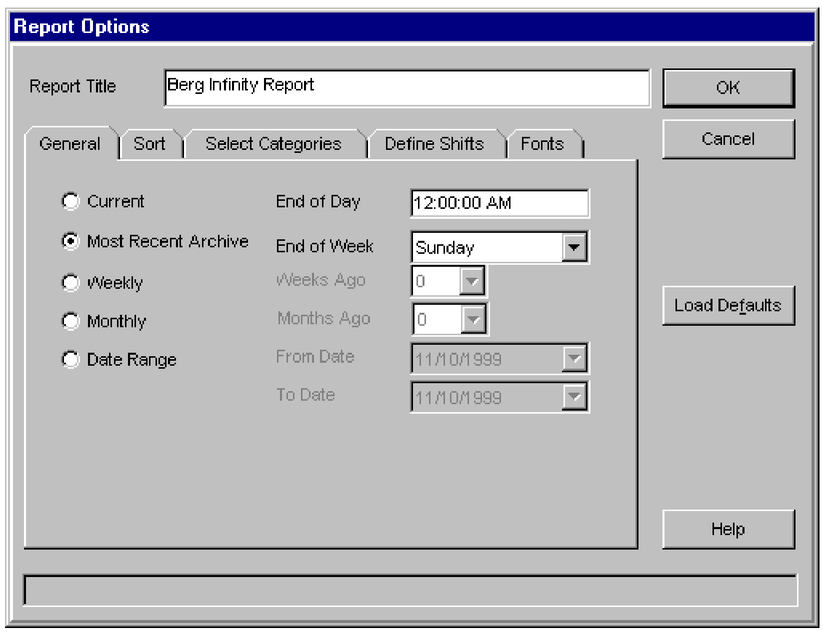
Set Report Options

Report options determine the look and scope of **Infinity** reports. The options you select are used as the default report options for your system. Specific reports can be customized with different options using the **Advanced Reporting** menu if desired. If you don't change any report options in the **Options** menu the Berg default options are used.



■ **To set report options:**

1. Run **Report**.
2. Pull down the **Options** menu. Click **Report Options...**.



3. Type a **Report Title**. (The Berg default is Berg Infinity Report.) The title appears at the top of all reports.

   The report title can be the name of the business or any name you prefer. It can be up to 39 characters (letters or numbers).

4. On the **General** tab, select the data you want **Infinity** to use for reports. (The Berg default is **Most Recent Archive**.)

   Current reports on all data currently stored at the ECUs, or in other words, all data since the last time you cleared sales at the ECU(s). To run this type of report the computer must communicate with the ECU(s).

Most Recent Archive reports on data from the last time you cleared sales at the ECU(s). This data is stored at the computer in the most recent archive record. (This was formerly known as Last Z.) To run this type of report the computer does not communicate with the ECU(s) or report on any data currently stored at the ECU(s).

Weekly reports on a business week of archive records stored at the computer. (A business week is defined by the **End of Week** day.) The week reported on can be the current week, 1, 2 or 3 weeks ago. The archive records available at the computer depend on the number of times you cleared sales at the ECU during the specified week. (The computer looks for all archive records with dates that match the days in the specified week.) To run this type of report the computer does not communicate with the ECU(s) or report on any data currently stored at the ECU(s).

Weeks Ago specifies which week's data to use for a **Weekly** report. 0 is the current business week (from the first day of the week to today), 1 is the business week before the current week, 2 is the week before that, etc.

Monthly reports on a calendar month of archive records stored at the computer. The month reported on can be the current month or any month up to a year ago. The archive records available depend on the number of times you cleared sales at the ECU during the specified month. (The computer looks for all archive records with dates that match the days in the specified month.) To run this type of report the computer does not communicate with the ECU(s) or report on any data currently stored at the ECU(s).

Months Ago specifies which month's data to use for a **Monthly** report. 0 is the current month (from the first day of the month to today), 1 is the month before the current month, 2 is the month before that, etc.

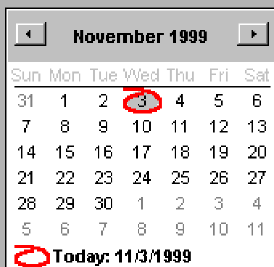
(continued on next page)

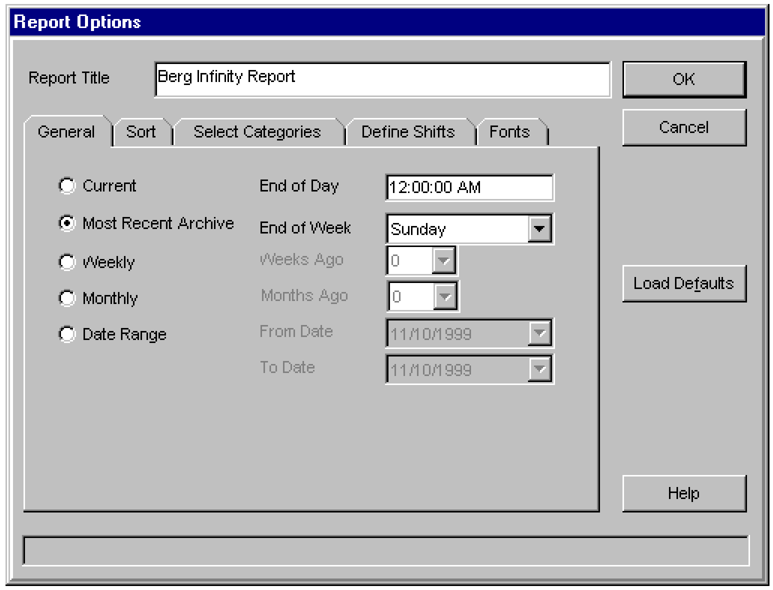
Archive Records

- Archive records for a specific date are only created at the computer when you archive and clear sales (Z) on that date.
- The archive record storage length is the amount of time the computer keeps archive records. This determines what data is available for archive reports. If your storage length is 3 months, you won't be able to run reports on any data further back than 3 months. The archive record storage length is set at the time of software installation. See *Enter Data Storage and Display Options* in the *Configuration Options* section.

Date Range

Click the drop-down arrow to see a calendar from which to choose your date.





To select a number of days ago as your default option, use **Date Range**.

Date Range (when set as a default option in the **Report Options** screen) doesn't actually specify a specific date range to report on—it specifies the number of days before the report date you want your reports to show data for. To use **Date Range** as your default option, determine the number of days ago you want to report on. Subtract that number from today's date. Type the result in the **From** field. (If today is 1/21 and you want reports to show data for the ten days previous to the report date, the **From** date should be 1/11. **Infinity** then runs reports on archive records for the ten days previous to and including the report date. It does not include data from 1/11 once the report date is later than 1/21.) The **To** date can't be changed to any date but today in **Report Options**. The archive records available depend on the number of times you cleared sales at the ECU during the specified days. (The computer looks for all archive records with dates that match the specified days.) To run this type of report the computer does not communicate with the ECU(s) or report on any data currently stored at the ECU(s).

Archive Reports

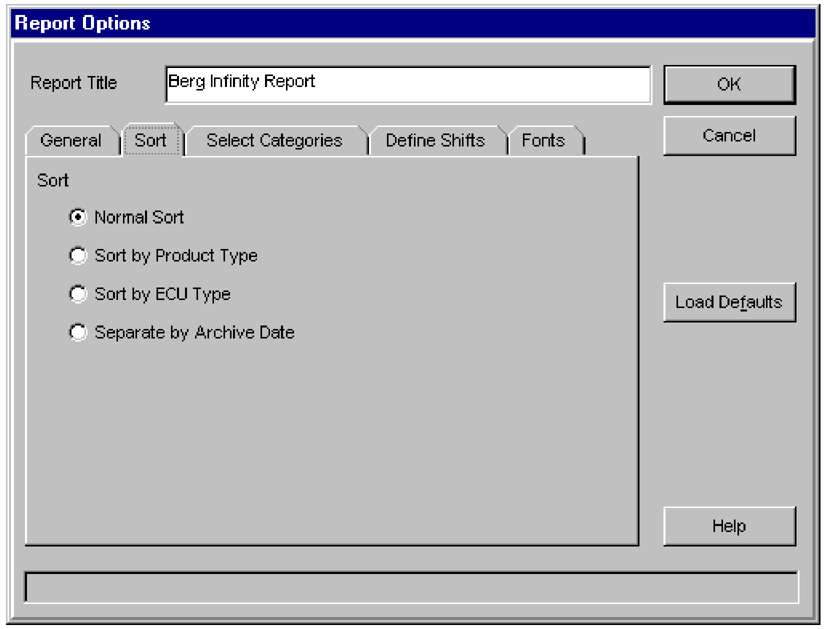
- Reports that use archive records (Most Recent Archive, Weekly, Monthly, Date Range) can only report on data you've put in the archive records during the time specified. They don't necessarily report on all sales activity for the time specified.
- For example, if you run a weekly report on sales from 2 weeks ago but the last time you archived and cleared sales was a month ago, there is no data in the archive records to run the weekly report.
- Even if you archive and clear sales from the ECU right before you try to run the weekly report, there are no archive records with the dates from 2 weeks ago. (Of course, sales information for that week is included in the archive record you just ran, but it can't be broken out into a weekly report because it wasn't archived weekly.)

5. Type the **End of Day** time. (The Berg default is 12:00 AM.)

   End of Day is the hour that marks the end of your business day (e.g 2:00 AM). Reports reflect the date the business day started. For example, if you ask for data from July 30, this will include data archived from 2:00:01 AM July 30 until 2:00 AM July 31. (12:00 PM is noon and 12:00 AM is midnight).

6. Select the **End of Week** day. (The Berg default is Sunday.)

   End of Week is the day that marks the end of your business week. This is used for weekly reports.



7. Click the **Sort** tab.

8. Select how **Infinity** sorts brand names on reports. (The Berg default is Normal Sort.)

   The sort does not determine subtotals–it just specifies how brand names are listed.

   Normal Sort provides a combined alphabetical list of all brands followed by an alphabetical list of cocktails.

   Sort by Product Type provides an alphabetical list of brands for each product type (liquor, wine, mixer, beer) followed by an alphabetical list of cocktails.

   Sort by ECU Type provides al list of all brands poured at Infinity ECUs followed by an alphabetical list of all brands poured at TAP 1 ECUs, then 1544 Infinity ECUs.

   Separate by Archive Date separates sales for each brand by archive dates. This option is only available on weekly, monthly or date range reports. The archive dates that appear on the report are the dates you cleared sales at the ECU. Each separate archive and clear sales (Z) report you've run appears on a different line (if the brand had sales for that report).

9. Click the **Select Categories** tab.

10. Select the **Product Type**, the **Pour Type**, and the **ECU Type** to include in reports. (The Berg defaults are All.)

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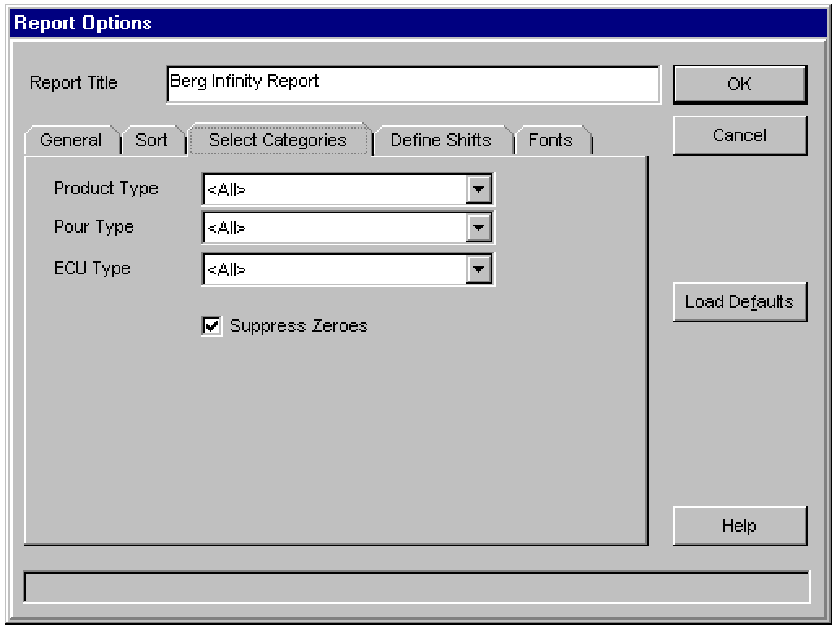


Product Types include Beer, Liquor, Wine, Mixer, Cocktail, Other and All. If you select a product type other than All, only sales data for that product type appears on reports.

Pour Types include Charged, Complimentary, Canceled and All.

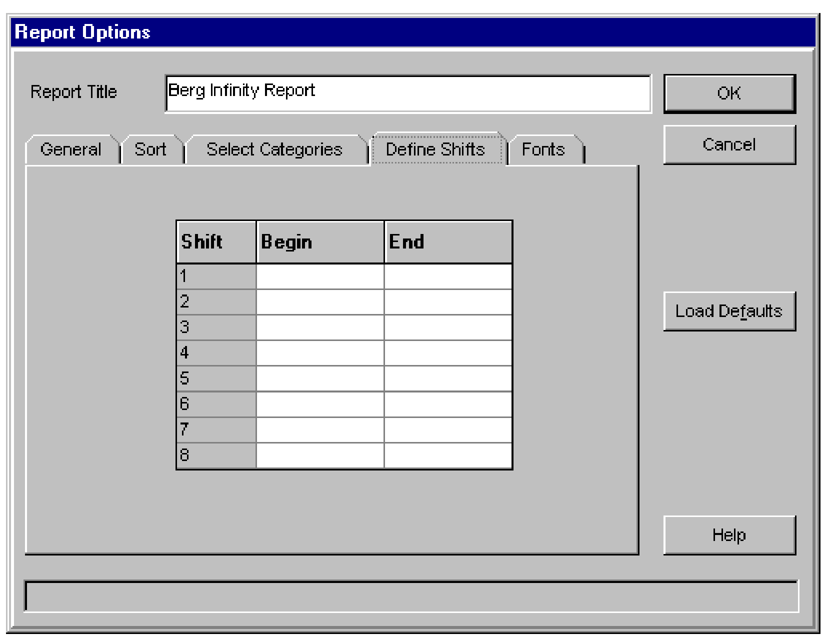
ECU Types include Infinity, TAP 1, 1544 Infinity and All.

11. Select **Suppress Zeroes** to eliminate any lines in a report that show zero in every column. (This is the Berg default.)

12. Click the **Define Shifts** tab.

Shift definitions are optional and are used to display sales data by shifts in an Hourly Sales (X4) report. If you define shifts, all sales from an entire shift are reported on one line

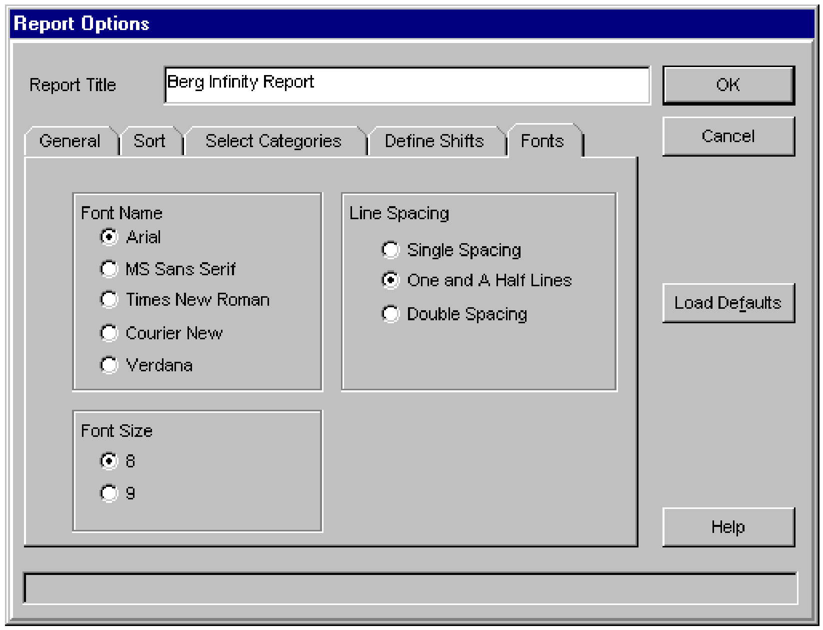
Shift definitions are only used by the Hourly Sales (X4) Report.



in the report (rather than sales being reported for each hour). See the sample *Hourly Sales (X4) Report* in this section for more details about the report.

13. Type the **Begin** and **End** time of each shift. (There is no Berg default.)

    Shift 1 is the first shift of a business day. Type the hour, a space and am or pm (e.g. 2 am). You can also use 24 hour notation. You can't enter minutes. Make sure shift times don't overlap.



14. Click the **Fonts** tab.

15. Select the **Font Name**, the **Font Size**, and the **Line Spacing** to use in all reports.

    Font Names include MS Sans Serif, Arial, Times New Roman, Courier New and Courier. Select the font you prefer for reading your reports. (The Berg default is Arial.)

    Font Sizes include 8 and 9. (The Berg default is 8.)

    Line Spacing determines the space between each line of data in a report. Options include Single Spacing, One and A Half Lines and Double Spacing. (The Berg default is One and A Half Lines.)

16. To load the Berg defaults for all tabs and the report title click **Load Defaults**.

17. Click **OK** to save the entries on all tabs and exit the **Report Options** screen. Or click **Cancel** to exit without saving any changes.

Berg Font Defaults

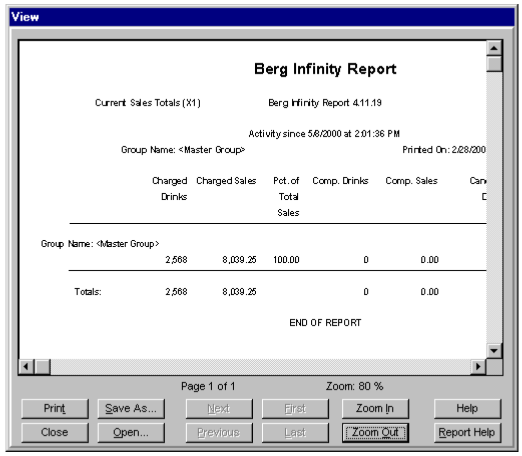
- The font defaults have been chosen to work well with the greatest range of printers. You should change the defaults only if it's necessary to get a good-looking report with your printer.
- If you choose MS Sans Serif, the Zoom buttons on the View screen will be disabled.

Managing Report Files

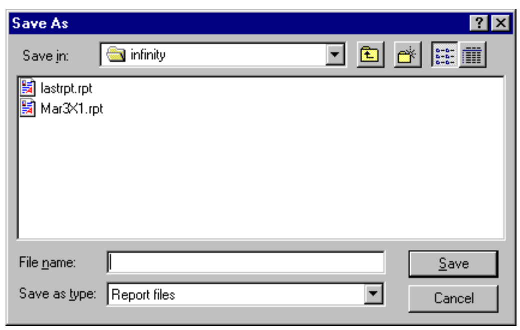
When you run an **Infinity** report, you can save a copy of it in a computer file. You can then open or delete any of your report files.

■ To save an Infinity report to a file:

1. Run the report. See *Run a Current Sales Report* or *Run an Advanced Report* in this section.



2. With the report in the **View** screen, click **Save As...**.



3. Select the **Save in:** folder for the report.

4. Type a **File name:** for the report. Choose a name that easily distinguishes this report file from other report files. You don't need to type the file extension (.rpt).

5. Click **Save**.

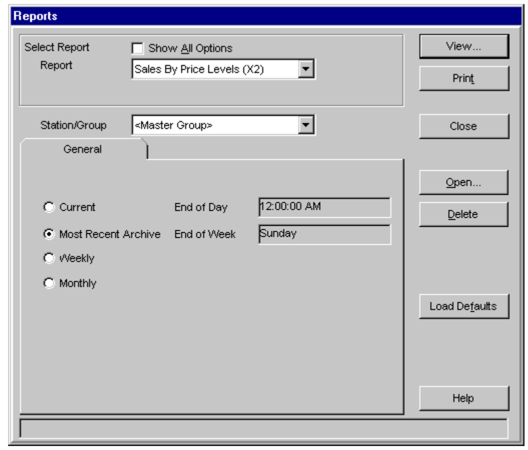
   The report is saved using the formatting information of the current default printer. If you open the file and print it later, it will only print well on that default printer.

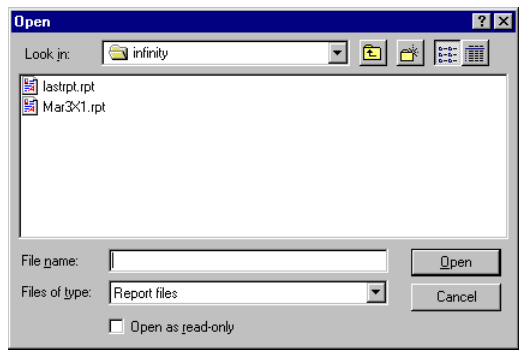
> You can also click on the report file name in Windows and it will start the Report program and display the report in the View screen.

■ To open a saved Infinity report file:

1. Select **Advanced Reporting | Advanced Report...** to access the **Reports** screen OR run a report to access the **View** screen.

2. Click **Open...**.





3. Select the **Look in:** folder of the report file.

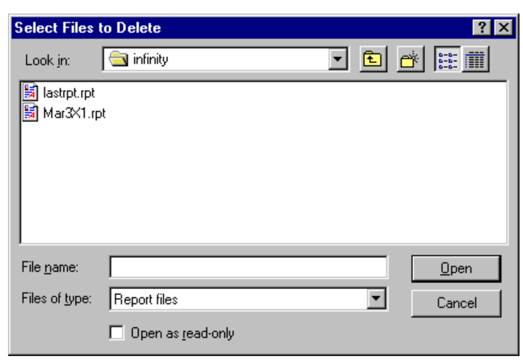
4. Double-click the name of the report OR type the report name and click **Open**.

> You can also delete report files as you would delete any other file in Windows.

■ To delete a saved Infinity report file:

1. Select **Advanced Reporting | Advanced Report...** to access the **Reports** screen.

2. Click **Delete**.



3. Select the **Look in:** folder of the report file.

4. Double-click the name of the report OR type the report name and click **Open**.

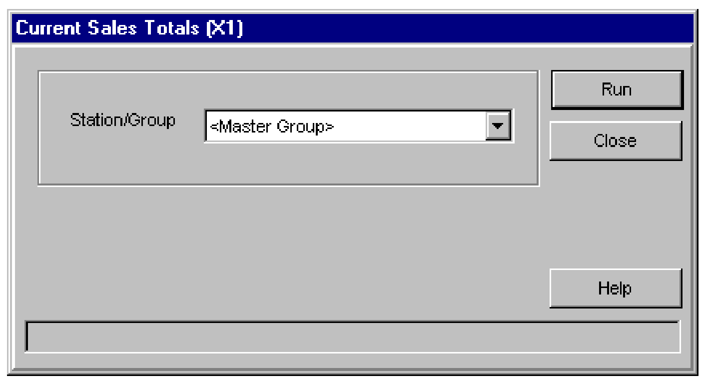
Run a Current Sales Report

Current sales reports show sales data currently stored at the ECU(s) or in other words, all data accumulated since the last time you cleared sales at the ECU. **Infinity** provides a convenient way to access four reports with the **Current Sales** menu. They are: Sales Totals (X1), Sales By Price Levels (X2), Detailed Sales (X3), and Hourly Sales (X4). For a description of each sales report see the *Sample Reports* section. The report options entered in the **Options** menu are used when you run a report with the **Current Sales** menu (with the exception of data type which is **Current** regardless of the data type you selected in the **Options** menu).

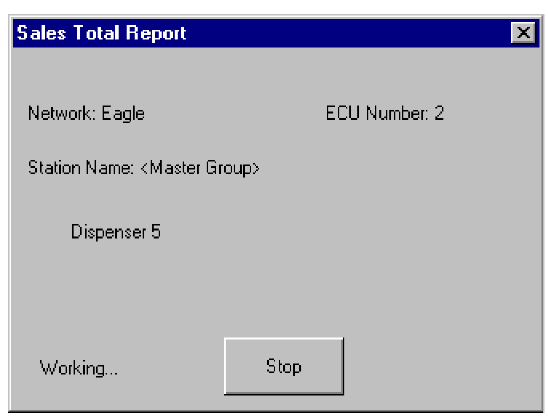
■ **To run a current sales report:**

1. Run **Report**.

2. Pull down the **Current Sales** menu. Click the name of the report you want to run.



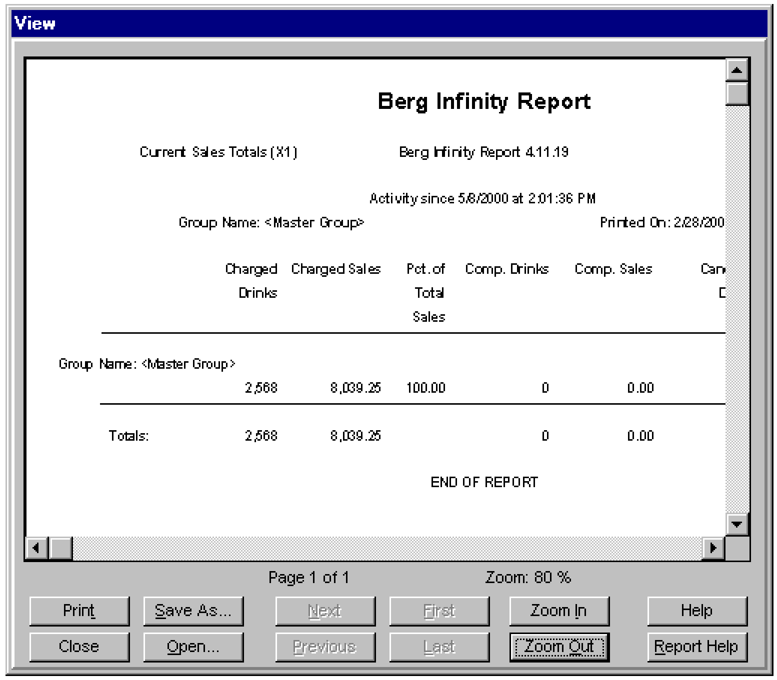
3. Select the **Station/Group**.
4. Click **Run** to run the report.



Never turn off or restart your computer while the report is running or sales data may be lost.

Wait while the data is retrieved from the ECU(s). The time it takes to run the report is determined by the amount of sales activity and the number of ECUs in the station or group.

- You can resize the View window and Infinity remembers the size you set.
- The Page Up and Page Down keys and the up and down arrow keys on your keyboard can be used to move around the report.
- If the report is longer than one page, use the four page navigation buttons on the screen to select the Next, First, Previous or Last page of the report.



- If you try to close the View screen without printing or saving the report, a prompt gives you a chance to cancel so you can save or print the report.
- See *Managing Report Files* in this section for help saving, opening and deleting Infinity report files.

5. View the report in the **View** screen using the scroll bars and **Zoom In** and **Zoom Out** buttons. (The Zoom buttons are disabled if you've chosen MS Sans Serif or Courier as the font for your report.) You can maximize the window by double-clicking the title bar.

6. To save the report to a file click **Save As...**. Enter the file name and click **Save**.

7. To print the report click **Print**. You'll be prompted to select a printer. The printer you select becomes your default printer for all programs running under Windows. If the report has multiple pages you can also select a page range.

8. Click **Close** to exit the **View** screen.

9. Click **Close** to exit the **Current Sales** report screen.

Note

❑ You can also run a current sales report using the **Advanced Reporting** menu. This is useful if you want to set specific options for a current sales report. See *Run an Advanced Report* in this section.

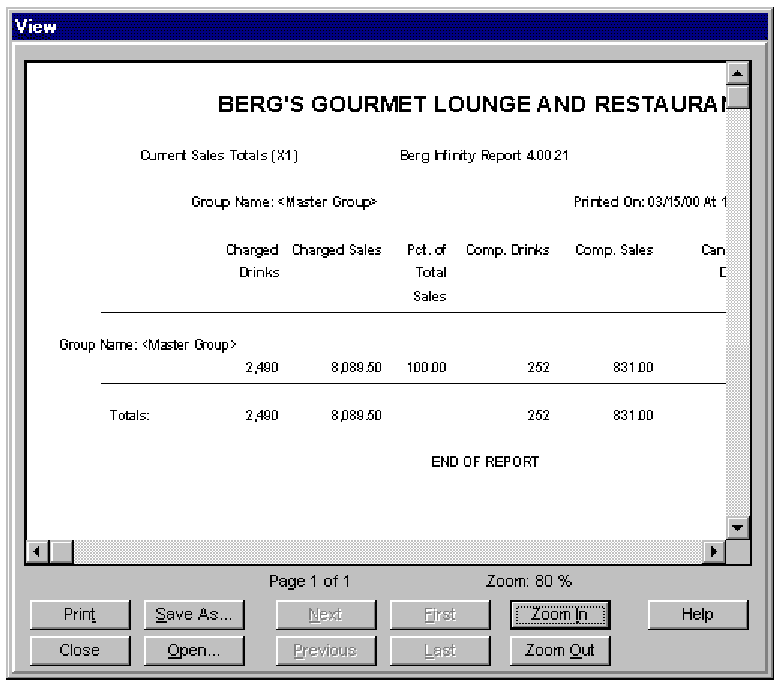
Run the Most Recent Report

You can view (and print) the last report run on your system using this convenient menu option. You select this feature using the **Current Sales** menu but "Most Recent" refers to the last report of any kind run on your system.

■ To run the most recent report:

1. Run **Report**.

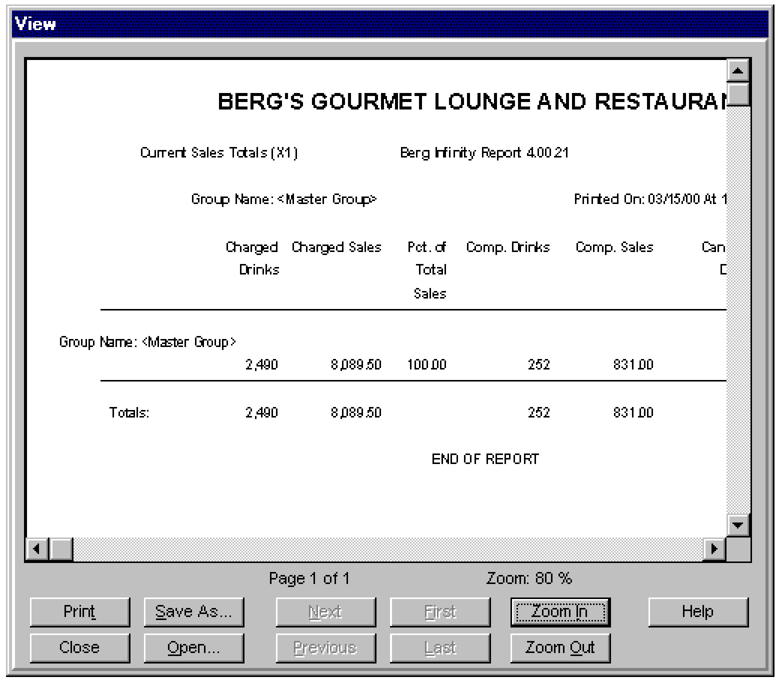
2. Pull down the **Current Sales** menu. Click **Most Recent Report...**.



3. View the report in the **View** screen using the scroll bars and **Zoom In** and **Zoom Out** buttons. (The Zoom buttons are disabled if you've chosen MS Sans Serif as the font for your report.) You can maximize the window by double-clicking the title bar.

Open...

- *Click Open... to view a report previously saved to a file.*



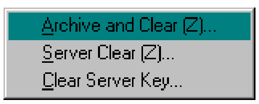
4. To save the report to a file click **Save As...**. Enter the file name and click **Save**.

5. To print the report click **Print**. You'll be prompted to select a printer. The printer you select becomes your default printer for all programs running under Windows. If the report has multiple pages you can also select a page range.

6. Click **Close** to exit the **View** screen.

Archive and Clear Sales (Z)

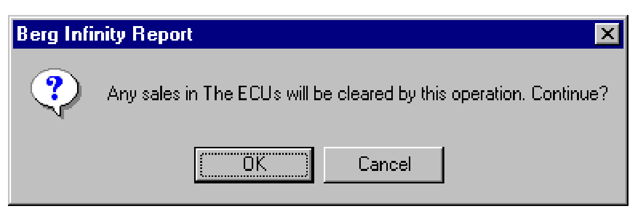
When you archive and clear sales at selected ECUs you reset all totals at the ECUs to zero and send the data to archive records at the computer. (This was called a Z report in earlier versions of **Infinity**.) The sales you clear from the ECU are shown on a **Current Sales Totals/Clear Sales** report which is identical to a **Current Sales Totals (X1)** report *except* running the report zeros out the ECU. See the sample *Current Sales Totals/Clear Sales (Z) Report* in the *Sample Reports* section for help with the data on the report. The archive records sent to the computer are stored for the length of time you selected under Data Storage and Display Options during **Infinity** installation.



■ To archive and clear sales (Z):

1. Run **Report**.
2. Pull down the **Clear Sales** menu. Click **Archive and Clear (Z)...**.

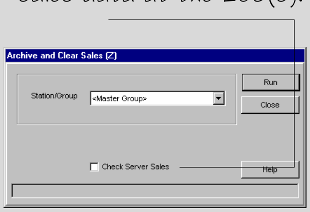
3. Select the **Station/Group**.
4. Click **Run** to archive and clear sales at all ECUs in the selected station or group.
5. Click **OK** to confirm the clearing of sales or click **Cancel** to exit the process.



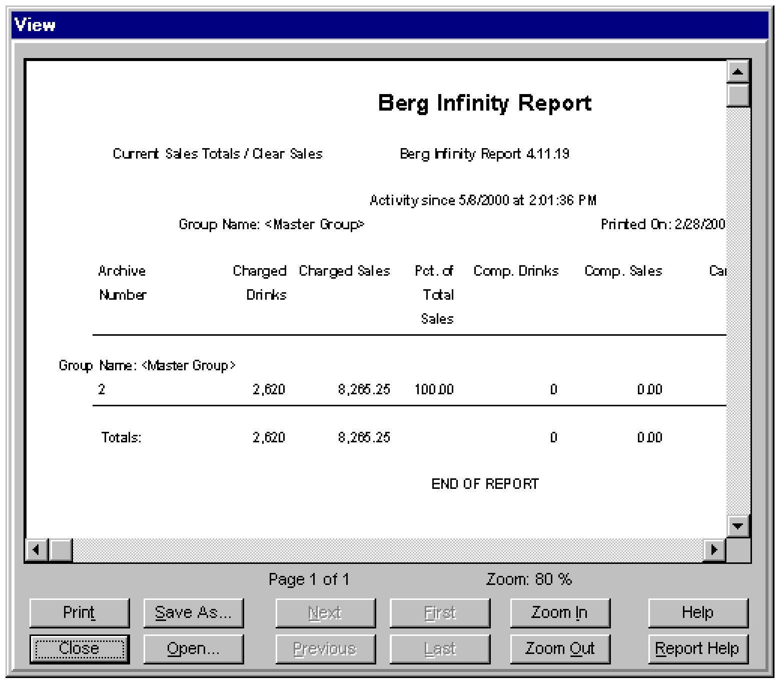
Wait while the data is retrieved from the ECU(s). The time it takes is determined by the amount of sales activity and the number of ECUs in the station or group. Never turn off or restart your computer while data is being retrieved or the data may be lost.

Server ID Sales

- If you have server ID select Check Server Sales to be informed of current server sales data at the ECU(s).



- You should clear server sales before clearing ECU sales if you want a report on server data.
- Sales data organized by server is not included on a Current Sales Total/Clear Sales report and is not archived at the computer.



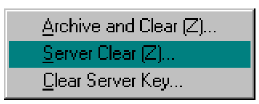
6. View the report in the **View** screen using the scroll bars and **Zoom In** and **Zoom Out** buttons. (The Zoom buttons are disabled if you've chosen MS Sans Serif or Courier as the font for your report.) You can maximize the screen by double-clicking the title bar.
7. To save the report to a file click **Save As...**. Enter the file name and click **Save**.
8. To print the report click **Print**. You'll be prompted to select a printer. The printer you select becomes your default printer for all programs running under Windows. If the report has multiple pages you can also select a page range.
9. Click **Close** to exit the **View** screen.
10. Click **Close** to exit the **Archive and Clear Sales (Z)** screen.

Clear Server Sales at the ECU

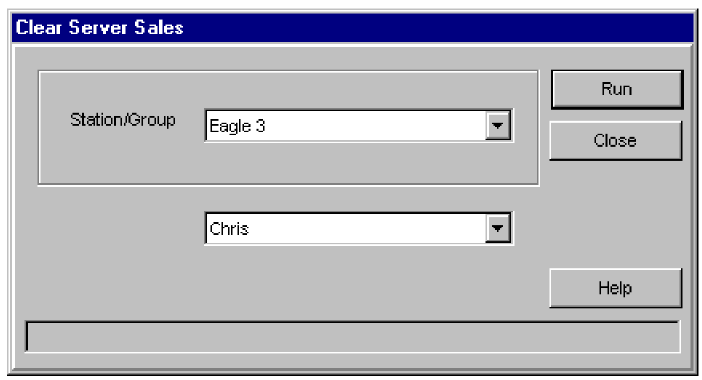
This report is only available if you've enabled Server ID. When you clear server sales at selected ECUs you reset all totals for selected servers at the ECUs to zero. The cleared server sales are not sent to archive records at the computer—the printed report is your only record of the sales by server. Clearing server sales generates a **Current Server Summary/Clear Server** report which is identical to a **Current Server Summary** report *except* running this report zeros out the ECU. See the sample *Server Summary/Clear Server Sales (Z) Report* in the *Sample Reports* section for help with the data on the report.

■ To clear server sales at the ECU:

1. Run **Report**.



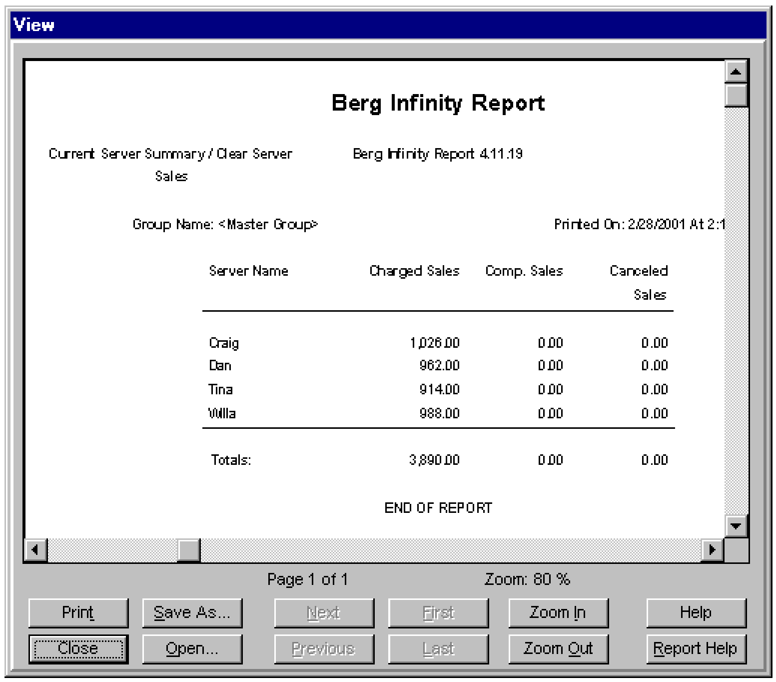
2. Pull down the **Clear Sales** menu. Click **Server Clear (Z)...**.



3. Select the **Station/Group**.
4. Select the server or select All.
5. Click **Run** to clear server sales for the selected server(s) at all ECUs in the selected station or group.

   Wait while the data is retrieved from the ECU(s). The time it takes is determined by the amount of sales activity and the number of ECUs in the station or group. Never turn off or restart your computer while data is being retrieved or the data may be lost.

6. View the report in the **View** screen using the scroll bars and **Zoom In** and **Zoom Out** buttons. You can maximize the screen by double-clicking the title bar.



7. To save the report to a file click **Save As...**. Enter the file name and click **Save**.

8. To print the report click **Print**. You'll be prompted to select a printer. The printer you select becomes your default printer for all programs running under Windows. If the report has multiple pages you can also select a page range.

9. Click **OK**.

10. Click **Close** to exit the **View** screen.

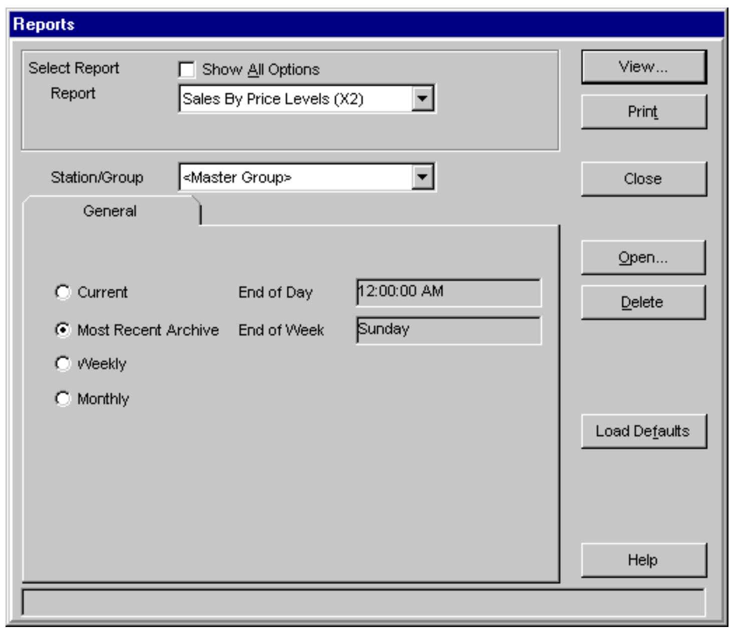
11. Click **Close** to exit the **Clear Server Sales (Z)** screen.

Run an Advanced Report

Infinity offers several reports in addition to those in the **Current Sales** and **Clear Sales** menus. These reports and any custom reports you create are run using the **Advanced Reporting** menu. For a description of all **Infinity** reports see the *Sample Reports* section.

■ To run an advanced report:

1. Run **Report**.
2. Pull down the **Advanced Reporting** menu. Click **Advanced Reports...**.



Load Defaults

- Click Load Defaults to use your default report options.
- Selecting a different report always reloads the default options.

Open.../Delete

- See *Managing Report Files* in this section for help saving, opening and deleting Infinity report files.

3. Select the **Report** you want to run. The list includes any custom reports you've created.
4. Select **Show All Options** if you want to see additional options available for the report.
5. Select the **Station/Group** for which you want to run the report.
6. Select options on the **General**, **Sort** and **Select Categories** tabs if you want to change options for this report only.

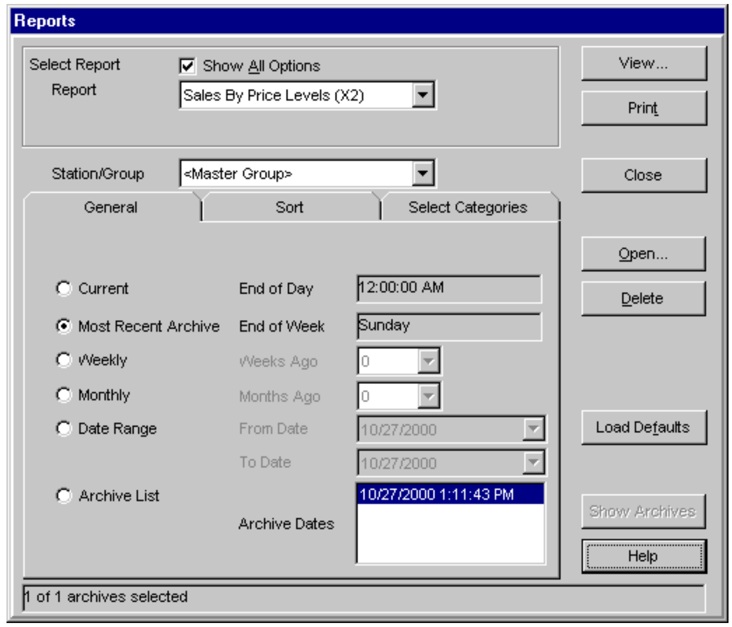
   See *Set Report Options* in this section for a description of all options. If you don't change any options, the default report options set up for your system are used to run the report. If you want to load your system defaults on all tabs click **Load Defaults**. Some options are not available for all reports.

Custom Reports

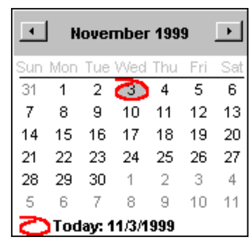
- The options you select for an advanced report are not used by the Schedule program. If you want to run a report with specific options using a schedule, see *Create a Custom Report* in this section.

Show Archives

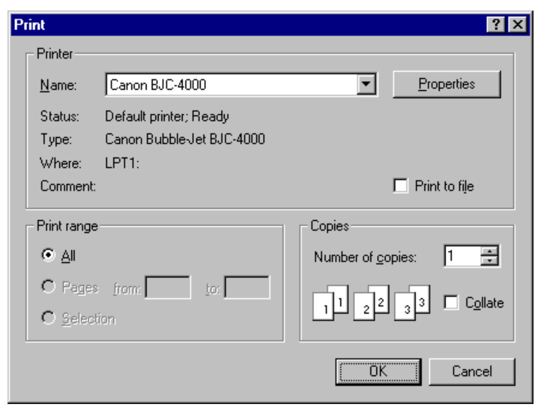
- When Show All Options is checked, you can click Show Archives to see a list of archive dates.
- If you select a monthly or weekly date range, all the archive dates involved will be highlighted.
- You can select archive records directly from the list as long as they are consecutive. The report will show the dates and times of the first and last records.
- The total count of archive records selected is shown in the status bar at the bottom of the screen.



To select a **Date Range**, type in the **From Date** and **To Date**.
OR
Click the drop-down arrow to see calendars to help you choose a date.



7. To send the report directly to a printer, click **Print**.



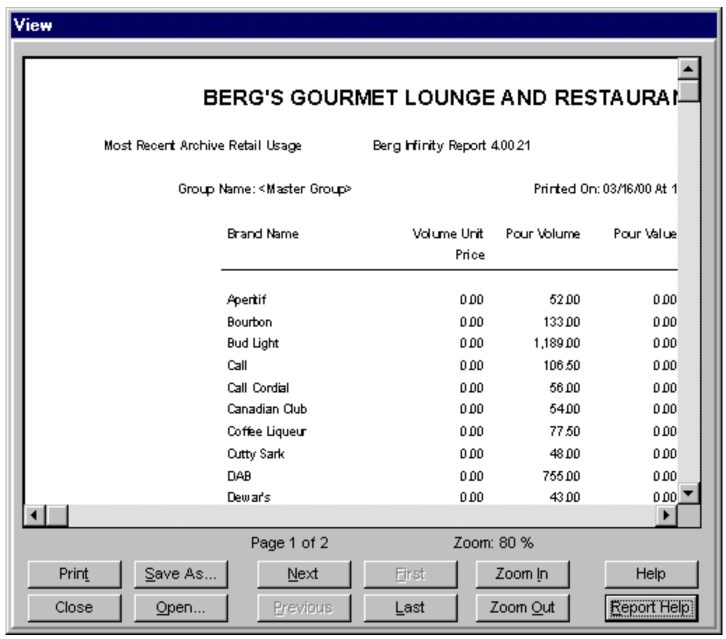
The printer you select becomes your default printer for all programs running under Windows. If the report has multiple pages you can select a page range.

Wait while the report is run. The time it takes to run the report is determined by the amount of sales activity and the number of ECUs in the station or group. Never turn off or restart your computer while the report is running or sales data may be lost. (continued on next page)

8. To view the report on the screen, click **View**.

   Wait while the report is run. The time it takes to run the report is determined by the amount of sales activity and the number of ECUs in the station or group. Never turn off or restart your computer while the report is running or sales data may be lost.

- You can resize the View window and Infinity remembers the size you set.
- The Page Up and Page Down keys and the up and down arrow keys on your keyboard can be used to move around the report.
- If the report is longer than one page, use the four page navigation buttons on the screen to select the Next, First, Previous or Last page of the report.



Open...

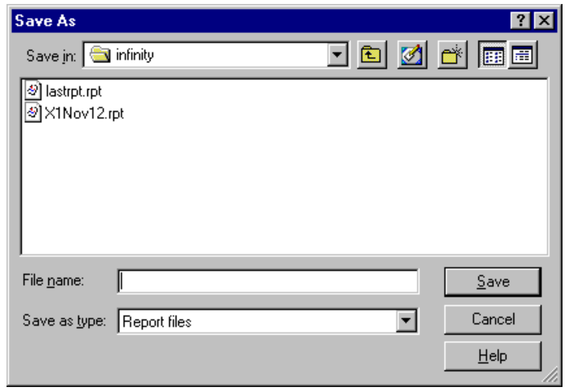
- Click Open... to view a report previously saved to a file.

9. View the report in the **View** screen using the scroll bars and **Zoom In** and **Zoom Out** buttons. (The Zoom buttons are disabled if you've chosen MS Sans Serif or Courier as the font for your report.) You can maximize the window by double-clicking the title bar.

10. To save the report to a file click **Save As...**.

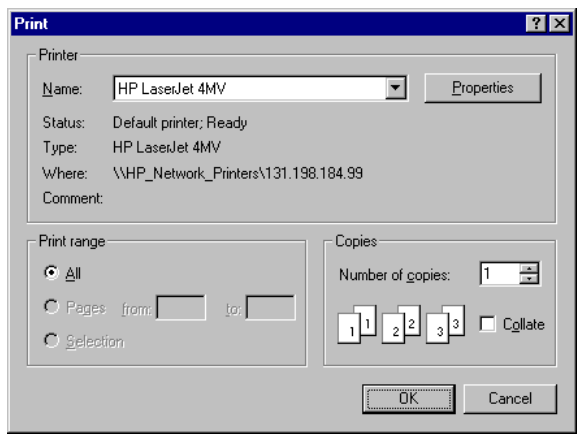
Save to a File

- If you try to close the View screen without printing or saving the report, a prompt gives you a chance to cancel so you can save or print the report.
- Saved report files can be opened by clicking Open on the View screen or the Reports screen. Or, you can click on the report file name in Windows and it will start the Report program and display the report in the View screen.
- When you save a report, you save it using the formatting information of the current default printer. If you open the file and print it later, it will only print well on that default printer.
- Delete report files by clicking Delete on the Reports screen.



Enter the file name and click **Save**.

11. To print the report click **Print**.



The printer you select becomes your default printer for all programs running under Windows. If the report has multiple pages you can select a page range.

12. Click **Close** to exit the **View** screen.

13. Click **Close** to exit the **Reports** screen.

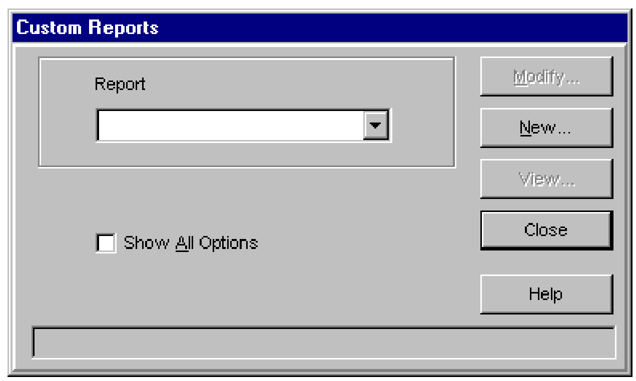
Create a Custom Report

You can create your own custom reports using the report options available in **Infinity**. This is especially helpful if there are several report options you change each time you run a certain report. You can set those options once, save the report with its own name and never have to set the options again. A custom report can be run from the Custom Reports screen, the Advanced Reports screen or by including the report in a schedule. Custom reports can be renamed or deleted if you choose.

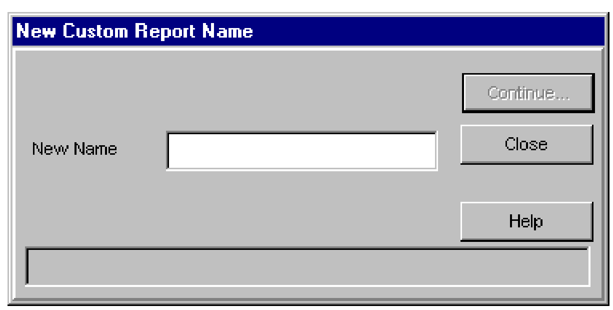
■ To create a custom report:

1. Run **Report**.

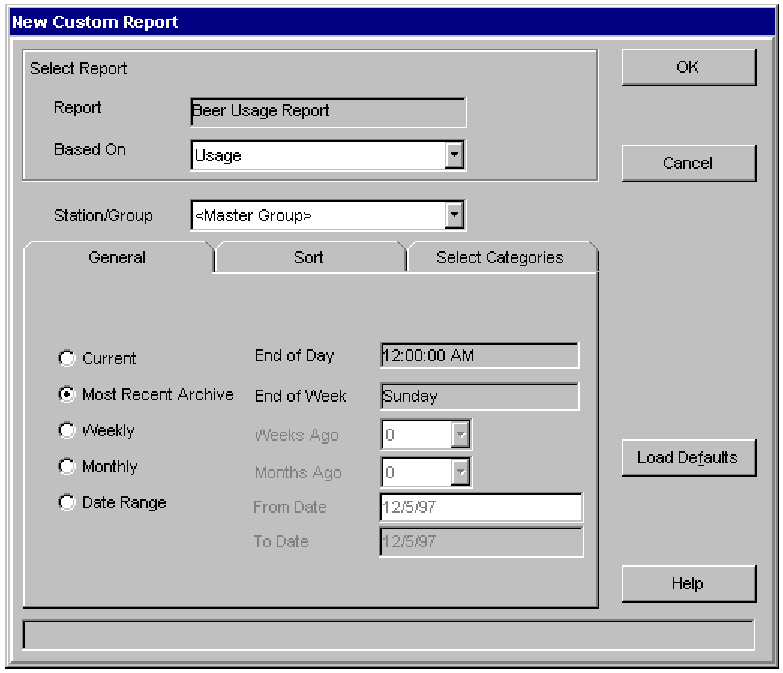
2. Pull down the **Advanced Reporting** menu. Click **Custom Reports...**.



3. Click **New...**.



4. Type the **New Name** of your custom report. It can be up to 19 characters.
5. Click **Continue...**.



6. Select the name of the report you want to customize from the **Based On** list.

   The **Based On** list contains standard reports and does not include other custom reports you may have created.

7. Select the name of the **Station/Group**.

8. Select the options on the **General**, **Sort** and **Select Categories** tabs that you want for your report.

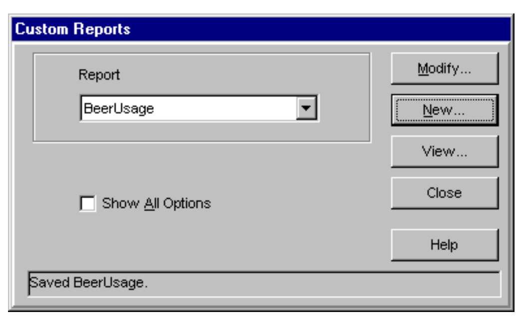
   Some options are not available for all reports. See *Set Report Options* in this section for a description of the options.

9. Click **OK** to save the customized report.

   The report is saved and the new name is added to the report list.

View...

- Click View... to run any custom report you've created.



10. Click **Close** to exit the **Custom Reports** screen.

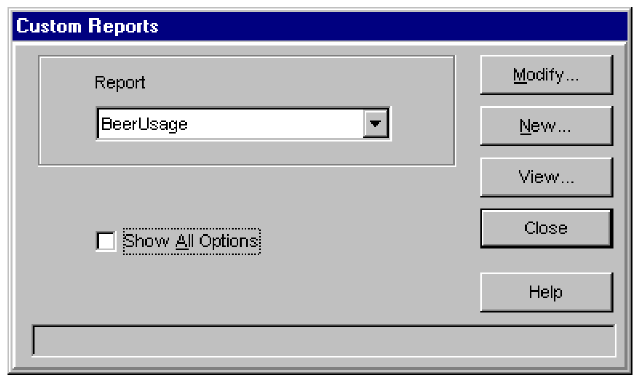
Modify a Custom Report

You can make changes to any custom report you have created. If you want to change the name of a custom report, see *Rename a Custom Report* in this section.

■ To modify a custom report:

1. Run **Report**.

2. Pull down the **Advanced Reporting** menu. Click **Custom Reports...**.

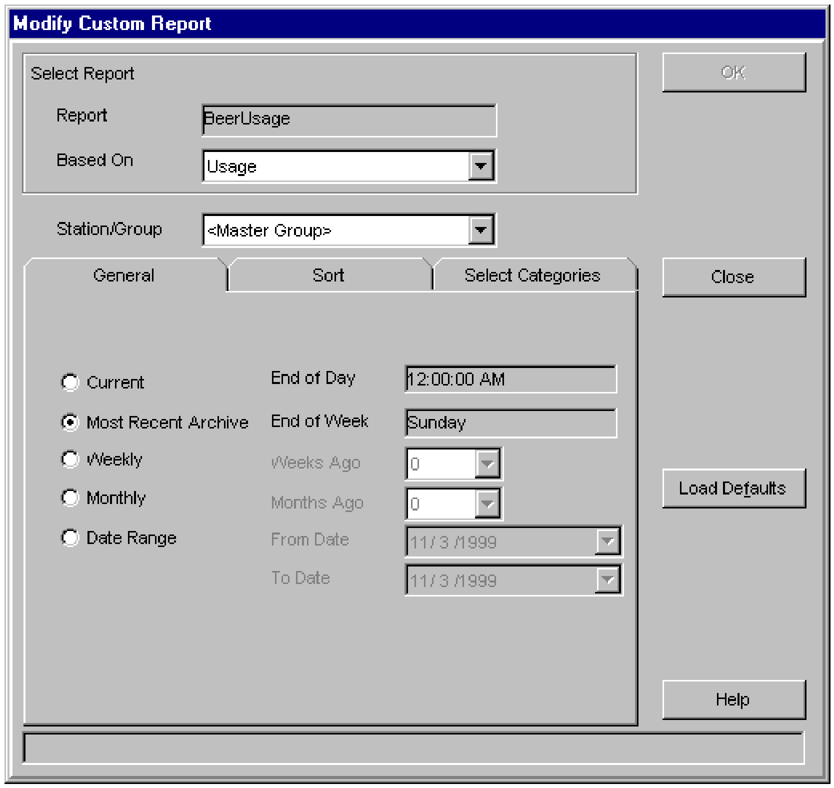


View...

- Click View... to run any custom report you've already created.

3. Select the **Report** you want to modify.

3. Click **Modify...**.



4. Make any modifications to the name of the **Station/Group**, the **Based On** report, and any options on the **General**, **Sort** and **Select Categories** tabs.

   Some options are not available for all reports. See *Set Report Options* in this section for a description of the options.

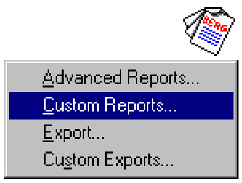
5. Click **OK**.

   The selected report, the selected station or group and all the selected options are saved.

6. Click **Close** to exit the **Custom Reports** screen.

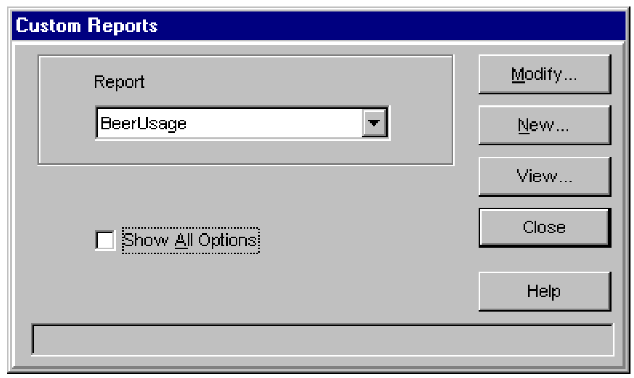
Rename a Custom Report

If you have already created a custom report and you want to change only its name, use this procedure. If you want to change the options you've set for a custom report, see *Modify a Custom Report* in this section.

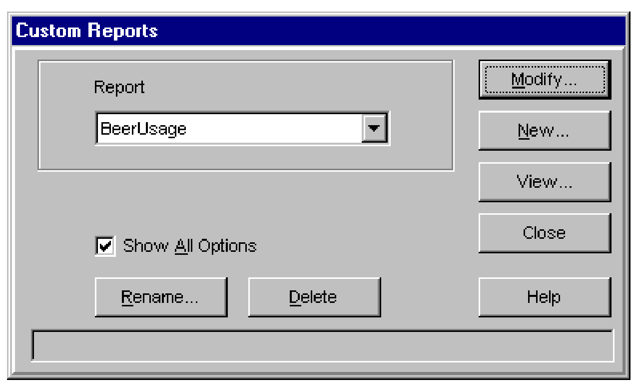


■ To rename a custom report:

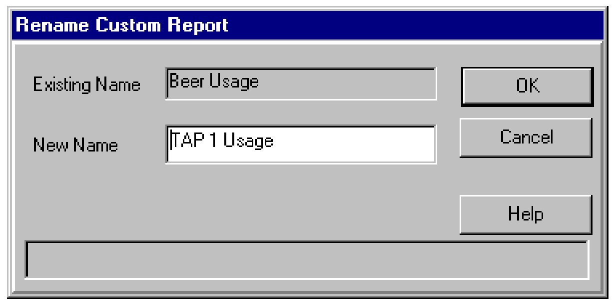
1. Run **Report**.
2. Pull down the **Advanced Reporting** menu. Click **Custom Reports...**.



3. Select the name of the **Report** you want to rename.
4. Select **Show All Options**.

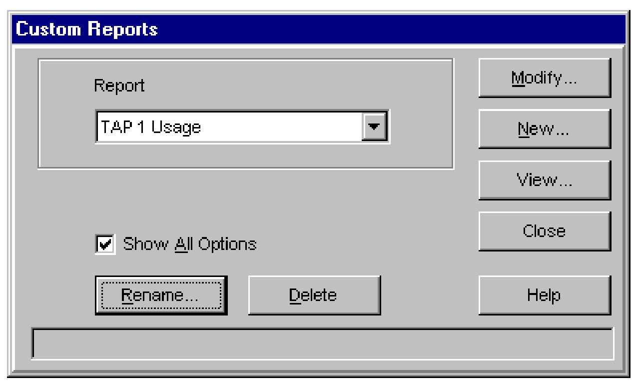


5 Click **Rename...**.



6. Type the **New Name** of your custom report. It can be up to 19 characters.

7. Click **OK**.



The report is saved with the new name.

8. Click **Close** to exit the **Custom Reports** screen.

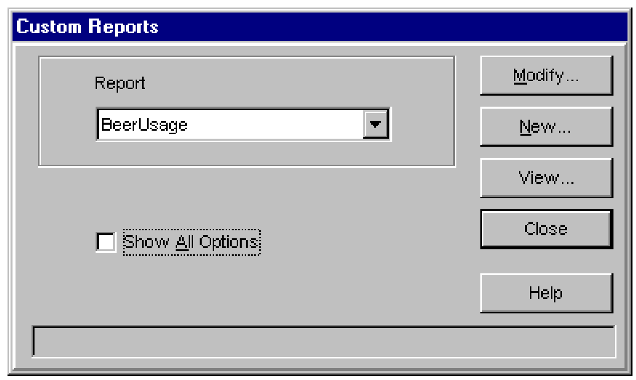
Delete a Custom Report

You can delete any custom reports you have created.

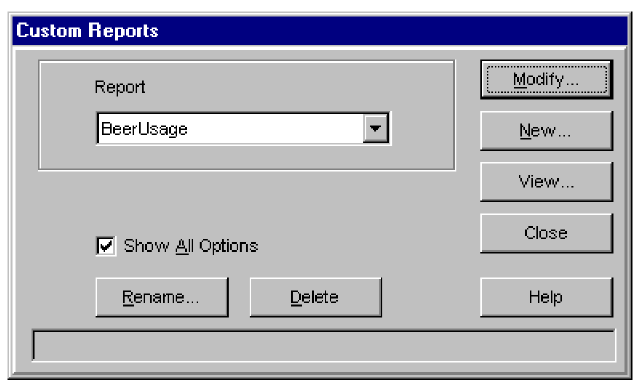
■ To delete a custom report:

1. Run **Report**.

2. Pull down the **Advanced Reporting** menu. Click **Custom Reports...**.

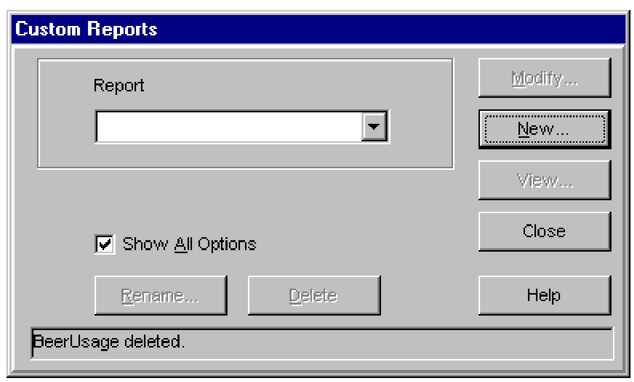


3. Select the name of the **Report** you want to delete.
4. Select **Show All Options**.



5. Click **Delete**.

6. Click **Yes** to confirm the deletion.



The report is deleted from the list.

7. Click **Close** to exit the **Custom Reports** screen.

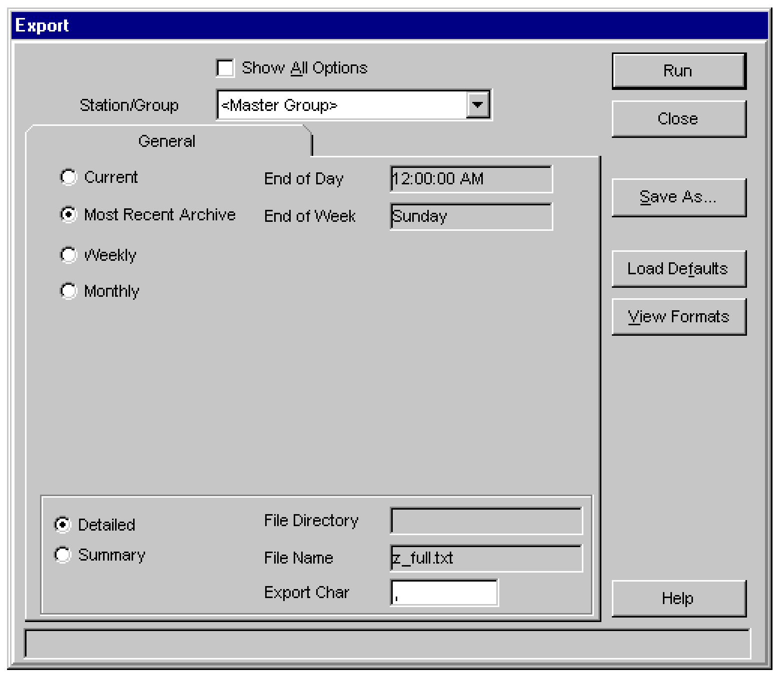
Export Report Data

You can export report data from **Infinity** archive records or current sales data in the ECUs to other software applications. To do this the report must be copied to a file in a form the other software can import. Check the documentation of your other software applications for help with importing data.

■ To export report data:

1. Run **Report**.

2. Pull down the **Advanced Reporting** menu. Click **Export...**.



3. Select **Show All Options** if you want to see additional options available for the export.

4. Select the name of the **Station/Group**.

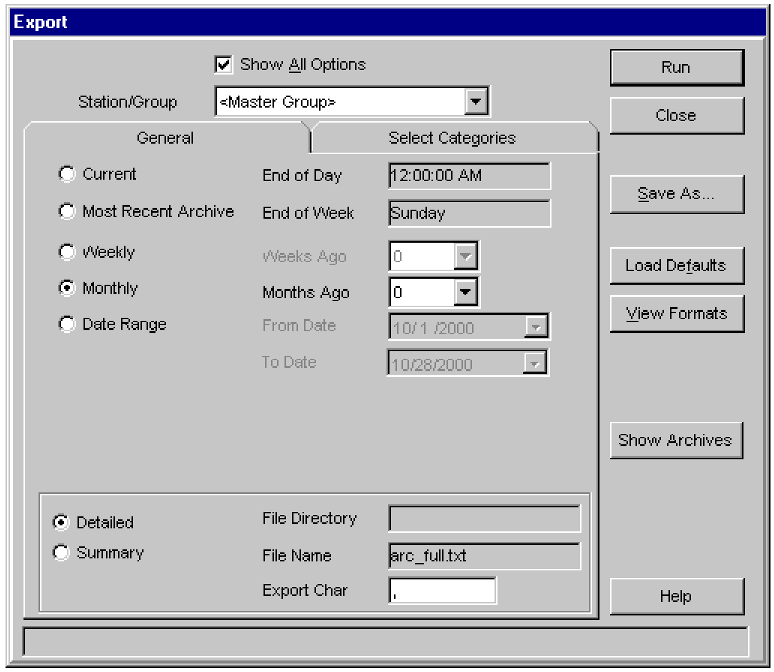
5. Select options on the **General** and **Select Categories** tabs if you want to change options for this export only.

   See *Set Report Options* in this section for a description of the options. If you don't change any options the default report options set up for your system are used. If you want to load your system defaults on all tabs click **Load Defaults**. Some options are not available for all reports.

   Date Range (when set in the **Export** screen) reports on archive data from a specified date to a specified date.

Show Archives

- When Show All Options is checked, you can click Show Archives to see a list of archive dates.
- If you select a monthly or weekly date range, all the archive dates involved will be highlighted.
- You can select archive records directly from the list as long as they are consecutive. The report will show the dates and times of the first and last records.
- The total count of archive records selected is shown in the status bar at the bottom of the screen.



6. Select **Detailed** or **Summary** for the type of report data to export.

   Detailed provides a breakdown of brand sales by portion size (as in a detailed sales report).

   You can't select **Detailed** for **Weekly**, **Monthly** or **Date Range** exports unless you select **Detailed Info** for quantity of stored data under Data Storage and Display Options. (See *Enter Data Storage and Display Options* in the *Configuration Options* section.) You can select **Detailed** for **Current** or **Most Recent Archive** exports regardless of what is set under Data Storage and Display Options.

   Summary does not provide portion size breakdown (as in a sales summary report).

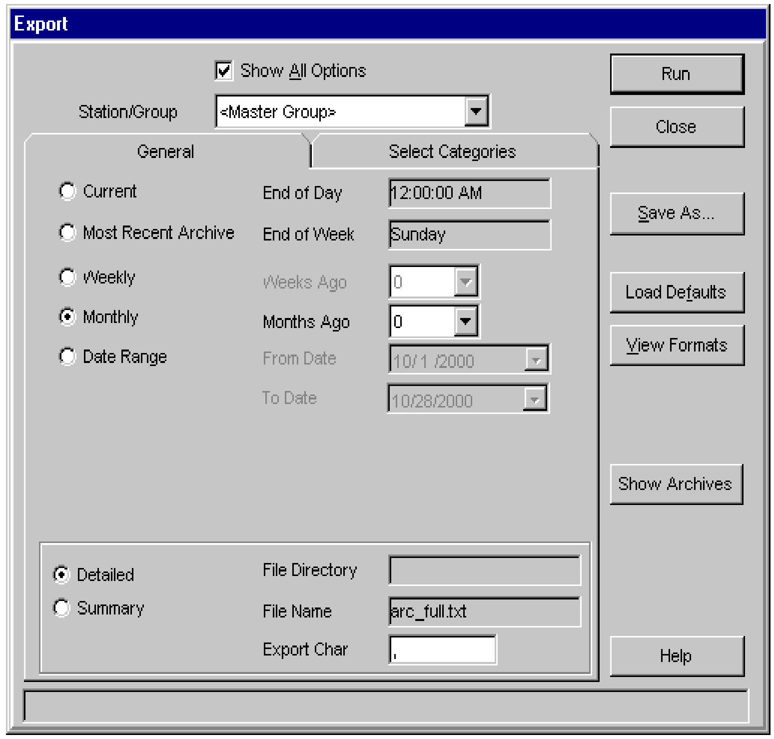
Date Range

Click the drop-down arrow to see a calendar from which to choose your date.

7. Type the **Export Char**.

   The export character (or export delimiter) is a character used to separate fields of information in the export file. The default is a comma (,). You should enter the export character required by the importing software application.

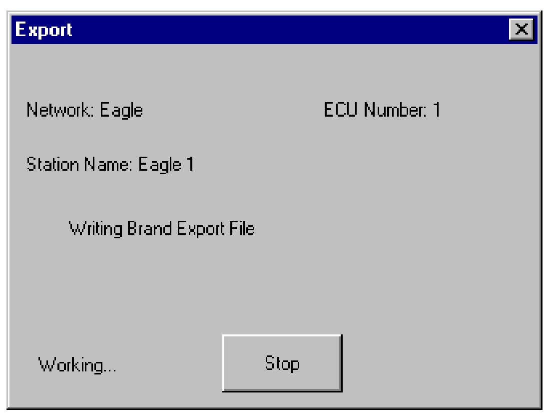
   (continued on next page)



The **File Name** field on the **Export** screen displays the default file name for the export file. Each export you run creates 2 files--one with a **.txt** extension for brand data, and another with the same filename with a **.mix** extension for cocktail data. The default file name changes according to your selection of options. See the table of default filenames.

Default File Name	File Description
cur_full.txt and .mix	current detailed exports
cur_sum.txt and .mix	current summary exports
z_full.txt and .mix	most recent archive detailed exports
z_sum.txt and .mix	most recent archive summary exports
arc_full.txt and .mix	weekly, monthly and date range detailed exports
arc_sum.txt and .mix	weekly, monthly and date range summary exports

8. To export using the default export **File Name**, click **Run**.



Wait while the export file is created. The time it takes is determined by your sales activity, the size of the station or group and whether you're exporting current or archive data. Never turn off or restart your computer while the file is being created or sales data may be lost.

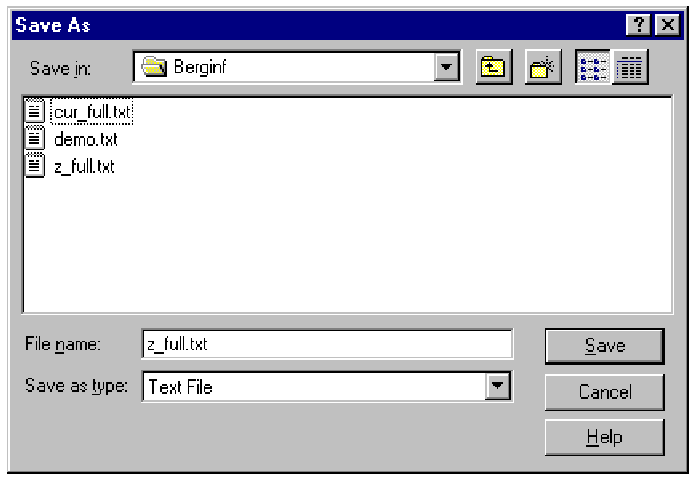
OR

9. To give the export file a new name click **Save As...**.

Variable File Names

You can use a variable string as a file name. See Variable File Names in *Create a Custom Export* in this section.

If you don't want an export file to replace an earlier one with the same name, you should give each export file you create a unique name.



10. Select the directory or folder to **Save in**. Type a **File name** for the file and click **Save**. Wait while the export file is created.

11. Click **Close** to exit the **Export** screen.

Notes

- ❑ If you need information about the **Infinity** export file format (such as field names, types and widths) click **View Formats**. See *Infinity Export File Format* in this section.

- ❑ Four spreadsheet templates for the data in an **Infinity** export file are included with your software. You can use these templates to place **Infinity** data in typical spreadsheet applications. See *Infinity Export Templates* in this section.

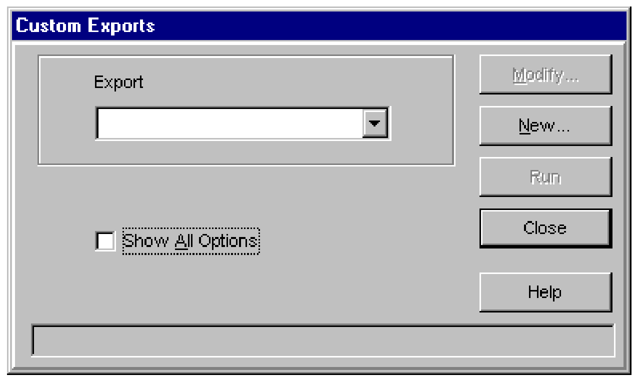
Create a Custom Export

A custom export gives you the chance to specify your own export parameters and save them with a unique name. You can then include the custom export in a schedule.

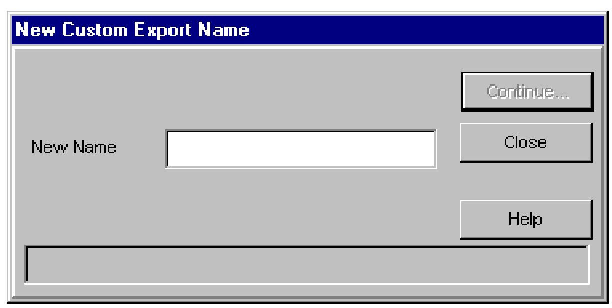
■ To create a custom export:

1. Run **Report**.

2. Pull down the **Advanced Reporting** menu. Click **Custom Exports...**.

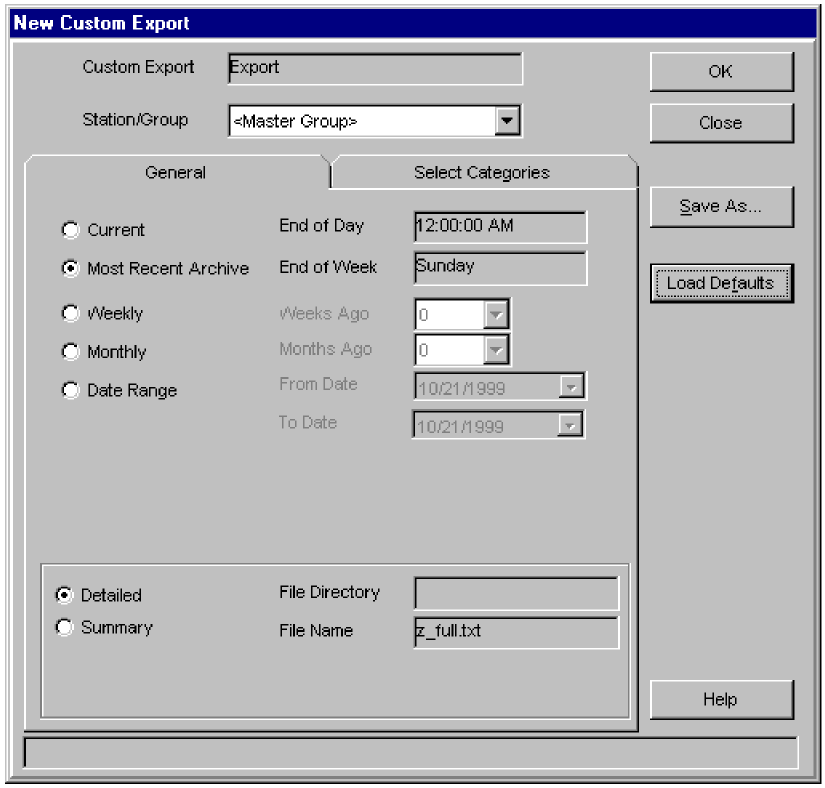


3. Click **New...**.



4. Type the **New Name** of your custom export. It can be up to 19 characters.
5. Click **Continue...**.
6. Select the name of the **Station/Group**.
7. Select options on the **General** and **Select Categories** tabs if you want to change options for this export only.

   See *Set Report Options* in this section for a description of the options. If you don't change any options the default report options set up for your system are used. If you want to load your system defaults on all tabs click **Load Defaults**. Some options are not available for all reports.



Date Range (when set in the **Export** screen) reports on archive data from a specified date to a specified date.

Default File Name	File Description
cur_full.txt and .mix	current detailed exports
cur_sum.txt and .mix	current summary exports
z_full.txt and .mix	most recent archive detailed exports
z_sum.txt and .mix	most recent archive summary exports
arc_full.txt and .mix	weekly, monthly and date range detailed exports
arc_sum.txt and .mix	weekly, monthly and date range summary exports

8. Select **Detailed** or **Summary** for the type of report data to export.

   Detailed provides a breakdown of brand sales by portion size (as in a detailed sales report).

   You can't select **Detailed** for **Weekly**, **Monthly** or **Date Range** exports unless you select **Detailed Info** for quantity of stored data under Data Storage and Display Options. (See *Enter Data Storage and Display Options* in the *Configuration Options* section.) You can select **Detailed** for **Current** or **Most Recent Archive** exports regardless of what is set under Data Storage and Display Options.

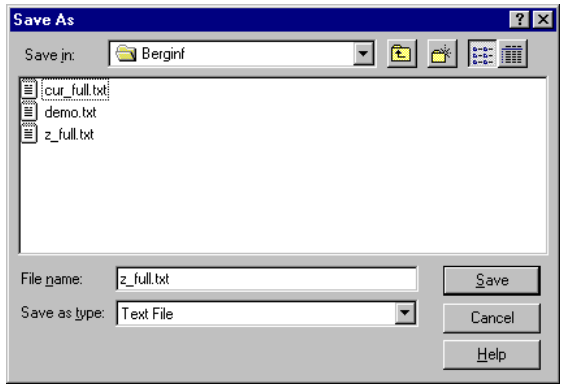
   Summary does not provide portion size breakdown (as in a sales summary report).

   The **File Name** field on the **Export** screen displays the default file name for the export file. Each export you run creates 2 files--one with a **.txt** extension for brand data, and another with the same filename with a **.mix** extension for cocktail data. The default file name changes according to your selection of options. See the table of default filenames.

9. To give the export file a new name click **Save As...**.

   (continued)

If you don't want an export file to replace an earlier one with the same name, you should give each export file you create a unique name.



10. Select the directory or folder to **Save in**. Type a **File name** for the file and click **Save**. To use a variable string as a file name, see the list on the next page.

11. To save the custom export you've created click **OK**.

12. To run the custom export click **Run** on the **Custom Exports** screen.

    Wait while the export file is created. The time it takes is determined by your sales activity, the size of the station or group and whether you're exporting current or archive data. Never turn off or restart your computer while the file is being created or sales data may be lost.

13. Click **Close** to exit the **Custom Export** screen.

Notes

- ❑ If you need information about the **Infinity** export file format (such as field names, types and widths) click **View Formats**. See *Infinity Export File Format* in this section.

- ❑ Four templates for the data in an **Infinity** export file are included with your software. You can use these templates to place **Infinity** data in typical spreadsheet applications. See *Infinity Export Templates* in this section.

Variable File Names

You can use the following strings to substitute for the export file name. Note that these substitutions are for the date the export is run, not the date(s) of the archives being exported.

{dd} - day of the month, e.g., 13

{ddd} - day of the week, short format, e.g., Tue

{dddd} - day of the week, full name, e.g., Tuesday

{mm} - two digit month number, e.g., 10 (for October)

{mmm} - name of the month short format, e.g., Oct

{mmmm} - name of the month, full name, e.g., October

{y} - day of the year, e.g., 355 for Dec.21

{yy} - two digit year, e.g., 00

{yyyy} - four digit year, e.g., 2000

{#} - first number to make the file name unique

If brackets do not match up or do not contain the strings above, they are left intact (as part of the file name).

Examples:

exp{ddd}.txt = exptue.txt

{dd}{mmm}{yy}.txt = 13oct98.txt

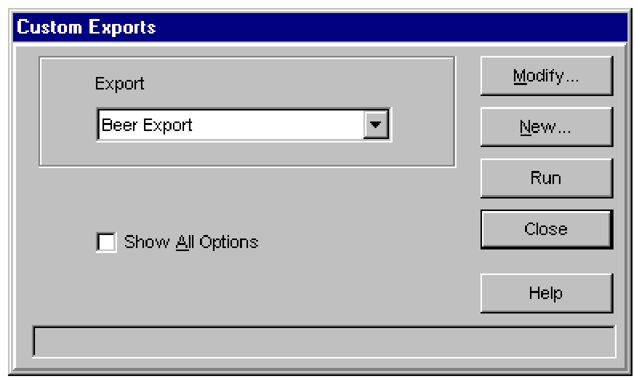
{dd{xxx}.txt = {dd{xxx}.txt (brackets don't match up)

Modify a Custom Export

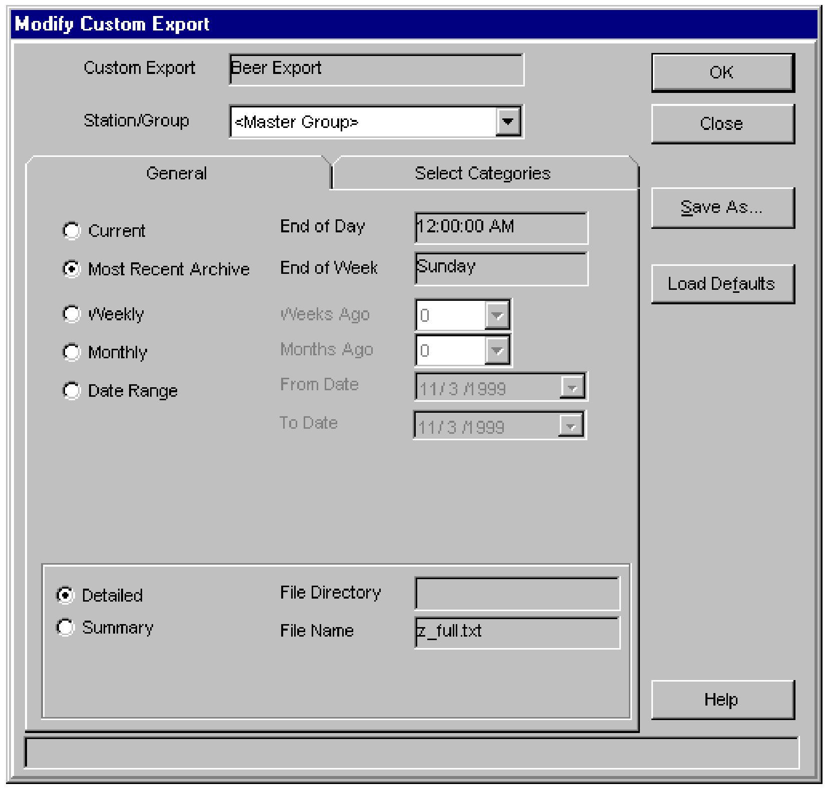
You can make changes to any custom export you've created. If you want to change the name of a custom report, see *Rename a Custom Export* in this section.

■ To modify a custom export:

1. Run **Report**.
2. Pull down the **Advanced Reporting** menu. Click **Custom Exports...**.



3. Select the **Export** you want to modify.
3. Click **Modify...**.
4. Make any modifications to the name of the **Station/Group** and any options on the **General** and **Select Categories** tabs.



Some options are not available for all exports. See *Set Report Options* in this section for a description of the options.

5. Click **OK**.

   The selected export, the selected station or group and all the selected options are saved.

6. Click **Close** to exit the **Custom Exports** screen.

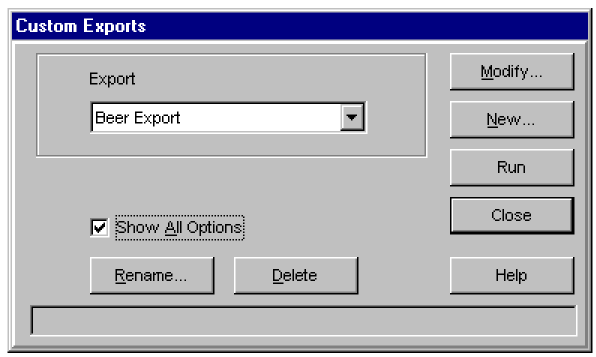
Rename a Custom Export

If you've already created a custom export and you want to change only its name, use this procedure. If you want to change the options you've set for a custom export, see *Modify a Custom Export* in this section.

■ To rename a custom export:

1. Run **Report**.

2. Pull down the **Advanced Reporting** menu. Click **Custom Exports...**.
3. Select the name of the **Export** you want to rename.
4. Select **Show All Options**.



5 Click **Rename...**.

6. Type the **New Name** of your custom export. It can be up to 19 characters.
7. Click **OK**.

   The export is saved with the new name.

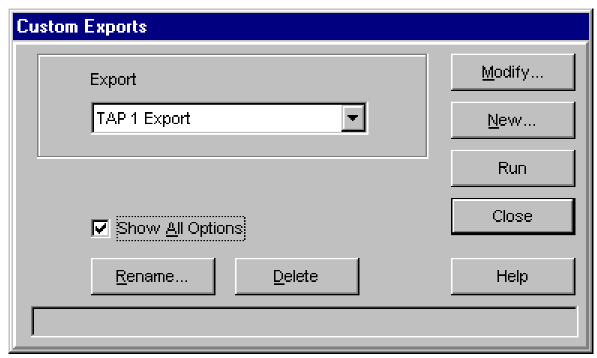
8. Click **Close** to exit the **Custom Exports** screen.

Delete a Custom Export

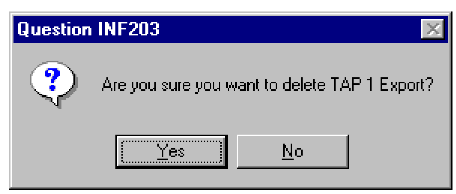
You can delete any custom exports you have created.

■ To delete a custom export:

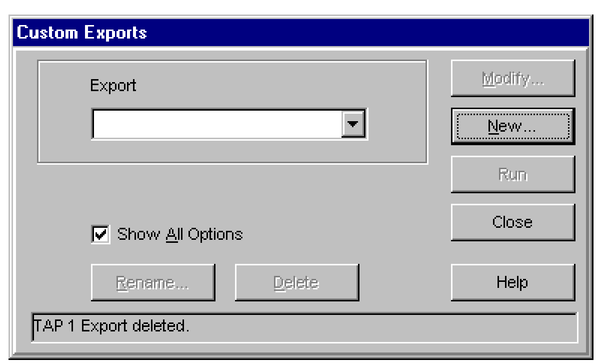
1. Run **Report**.
2. Pull down the **Advanced Reporting** menu. Click **Custom Exports...**.
3. Select the name of the **Export** you want to delete.
4. Select **Show All Options**.



5. Click **Delete**.



6. Click **Yes** to confirm the deletion.



The export is deleted from the list.

7. Click **Close** to exit the **Custom Exports** screen.

Infinity Export File Format

Infinity provides a printout of the format used in all export files. The file format shows the field names, types, column widths, etc. of the data in an **Infinity** export file. To print a four page file format click **View Formats** on the **Export** screen. See *Export Report Data* in this section.

Detailed Format

Detailed Format outlines items contained in an export file if you select a **Detailed** report. The format includes a **Detailed Brand Format** (which is always a .txt file) and a **Detailed Cocktail Format** (which is a .mix file).

Summary Format

Summary Format outlines items contained in an export file if you select a **Summary** report. The format includes a **Summary Brand Format** (which is always a .txt file) and a **Summary Cocktail Format** (which is a .mix file).

Field Name

The **Field Name** column lists the fields of information contained in the export file. The fields are listed in the order they appear in the file. The fields are separated in the export file by the export character (or delimiter).

Type

The **Type** column displays whether each field is a **C** (character) or **N** (number) type. The data in all **C** type fields is surrounded by quotes in the export file.

Max Width

The **Max Width** column lists the maximum number of characters in each field of the export file.

Dec

The **Dec** column lists the decimal precision, or number of places to the right of the decimal for all **N** type fields. All price decimals in **Infinity** are determined by the currency format setting in Windows. All volume decimals are determined by the volume units selected for **Infinity**. (See *Enter Unit of Measure and Cost Format* in the *Configuration Options* section.) Ounces =2 decimal places, Liters=4 decimal places, centiliters=2 decimal places, milliliters/cubic centimeters=1 decimal place.

Berg Infinity Report

Export **Berg Infinity Report 4.00.14** **Page 1**

Time: 3:55:59 PM **Date: 11/22/1999**

Detailed Format

All fields are separated by the export delimiter. Note that all C types are also surrounded by quotes.

Note that when details are not available for all sizes, then the info is put into size 1.

Detailed Brand Format (.txt)

Field Name	Type	Max Width	Dec
Network Name	C	20	
Station Name	C	20	
ECU Number	N	3	
Archive Number	N	5	
Date of Archive And Clear Sales Report	C	11	
Time of Archive And Clear Sales Report	C	11	
Dispenser Number	N	2	
Brand Name	C	20	
Brand Number	N	3	
Price Level	C	1	
Charged Drinks Size 1*	N	6	
Charged Sales Size 1*	N	11	2
Charged Volume Size 1*	N	11	2
Charged Drinks Size 2*	N	6	
Charged Sales Size 2*	N	11	2
Charged Volume Size 2*	N	11	2
Charged Dirnks Size 3*	N	6	
Charged Sales Size 3*	N	11	2
Charged Volume Size 3*	N	11	2
Charged Drinks Size 4*	N	6	
Charged Sales Size 4*	N	11	2
Charged Volume Size 4*	N	11	2
Charged Drinks Size 5*	N	6	
Charged Sales Size 5*	N	11	2
Charged Volume Size 5*	N	11	2
Charged Drinks Size 6*	N	6	
Charged Sales Size 6*	N	11	2
Charged Volume Size 6*	N	11	2
Charged Drinks Size 7*	N	6	
Charged Sales Size 7*	N	11	2
Charged Volume Size 7*	N	11	2

(This is page 1 of the multiple page export format printout.)

Infinity Export Templates

Infinity provides four templates you can use to place **Infinity** export files in other software applications. Each of the four templates comes in a .WK3 format (for most spreadsheets). These templates provide column headers and set appropriate column widths for **Infinity** export file data. See the documentation of the importing software for help with opening and placing the templates in other applications. The template files are located in your main **Infinity** directory or folder.

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branddet.WK3

Use this template for:

cur_full.txt files (detailed current reports)

z_full.txt files (detailed most recent archive reports)

arc_full.txt files (detailed archive reports)

brandsum.WK3

Use this template for:

cur_sum.txt files (summary current reports)

z_sum.txt files (summary most recent archive reports)

arc_sum.txt files (summary archive reports)

cktldet.WK3

Use this template for:

cur_full.mix files (detailed current cocktail reports)

z_full.mix files (detailed most recent archive cocktail reports)

arc_full.mix files (detailed archive cocktail reports)

cktlsum.WK3

Use this template for:

cur_sum.mix files (summary current cocktail reports)

z_sum.mix files (summary most recent archive cocktail reports)

arc_sum.mix files (summary archive cocktail reports)