OFFICIAL PRODUCT TRAINING MANUAL

bamisOS Restaurants & Bars

Role-based operating guide for owners, managers, cashiers, servers, bartenders, kitchen teams, stock controllers and finance reviewers. Use it for onboarding, daily SOPs and supervisor checks.

EDITION	FORMAT	DEMO IDENTITY	SUPPORT
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CHAPTER 1

Operating principles

Core rule: Record every order, payment, void, refund, stock adjustment, waste event and shift close under the correct user and outlet.

Use named access

Each operator uses the assigned login or PIN. Shared credentials weaken staff accountability and audit records.

Record before closing

Do not reconstruct orders, stock losses or payment totals after the shift. Enter events while they are current.

Confirm transfers

Verify account credit before marking a transfer as paid. A payment alert or customer screenshot alone is not settlement proof.

Use reasons

Voids, refunds, discounts, spillage, waste and stock adjustments require a clear reason for manager review.

CHAPTER 2

Roles and access

Owner / Director

Reviews outlet performance, shift summaries, stock variance, margin and management reports.

Manager / Supervisor

Opens and closes shifts, reviews exceptions, approves controlled actions and confirms daily reconciliation.

Cashier / Server

Creates orders, records modifiers, routes tickets and settles payments under the correct order.

Bartender

Works bar tickets, follows configured pours and records waste, returns and open-bottle issues.

Kitchen team

Receives production tickets and updates new, in-progress, ready and exception states.

Stock / Finance

Maintains units, receives stock, reviews movement and reconciles sales, payments and inventory records.

Control: Give each role only the access needed for its job. Managers should review role assignments whenever staff responsibilities change.

CHAPTER 3

Initial outlet setup

1. **Create outlet and service areas**
   Set the branch, restaurant, bar, lounge, terrace, room-service or takeaway areas used in daily operations.

2. **Add users and roles**
   Create named access for managers, cashiers, servers, bartenders, kitchen teams, stock controllers and reviewers.

3. **Build menu and price lists**
   Add food, drinks, bottles, shots, cocktails, modifiers, taxes and outlet-specific prices as configured.

4. **Configure units and recipes**
   Define bottle, shot, glass, case, carton, keg and ingredient relationships, then connect recipes to sellable items.

5. **Configure payment types**
   Enable the payment methods the outlet accepts and train cashiers on the correct settlement choice.

6. **Test the full order**
   Create a test order, route it to production, settle it and confirm the expected stock and report entries before go-live.

Go-live check: Menu, prices, tax, recipes, production routing, users, payment methods, opening balances and printers/displays should be checked together.

CHAPTER 4

Daily opening routine

- ☐ Manager confirms the correct outlet and trading date.
- ☐ Cash drawer opening balance is counted and recorded.
- ☐ Payment terminals and transfer-confirmation access are ready.
- ☐ Cashiers, servers, bartenders and kitchen teams use their assigned access.
- ☐ Fast-moving spirits, beer, mixers, proteins, garnishes and packaging are checked.
- ☐ Open bottles and high-value items are counted where required.
- ☐ Kitchen/bar displays or printers are tested.
- ☐ Active menu, price list and unavailable items are confirmed.

CHAPTER 5

POS, tables and order capture

1. **Select the order source**
   Choose table, bar seat, counter, takeaway, QR or WhatsApp according to how the order arrived.

2. **Add the correct items and units**
   Select bottle, shot, cocktail, food item and modifier buttons. Avoid manual prices unless authorised.

3. **Confirm notes and quantities**
   Review guest notes, preparation modifiers, quantity and assigned table/server before sending.

4. **Send to production**
   Route food to kitchen and drinks to bar. Verify that the ticket appears in the correct production queue.

5. **Update the order**
   Add approved items to the existing order rather than opening duplicate tickets for the same table.

6. **Settle only when complete**
   Review the bill, split where needed, choose the verified payment method and issue the receipt.

CHAPTER 6

Kitchen and bar production

Ticket states

- **New:** received but not started
- **In progress:** preparation has begun
- **Ready:** complete and awaiting service
- **Urgent / exception:** needs supervisor attention

Production discipline

- Work the oldest due ticket first unless priority is approved.
- Read modifiers before preparation.
- Do not mark ready before the full ticket is complete.
- Report unavailable ingredients before accepting more orders.

Order-source visibility: production staff should be able to distinguish table, takeaway, QR and WhatsApp tickets while following the same preparation status process.

CHAPTER 7

Payments, discounts, voids and refunds

Action	Operator procedure	Manager control
Cash	Count amount received, enter tender and return the displayed change.	Reconcile drawer against system cash at close.
Transfer	Confirm account credit, then mark the order paid by transfer.	Review transfer total against bank record.
POS/Card	Confirm approved terminal response before settlement.	Reconcile system total to terminal report.
Discount	Select approved discount and reason.	Review discount user, value and reason.
Void	Void only the incorrect item/order and enter a clear reason.	Review before or during close according to role policy.
Refund	Reference the original transaction and approved refund reason.	Confirm authorisation and settlement record.

Do not: mark an unpaid order as paid, delete a suspicious ticket, reuse a transfer confirmation or settle an order under the wrong payment type.

CHAPTER 8

Stock, recipes and bottle-to-shot control

Units and conversion

Use configured units for bottle, shot, glass, case, carton, keg and recipe ingredients. Example: a 70cl bottle can be configured into approved 25ml or 50ml pour units.

Recipe deduction

Cocktails and menu items consume the ingredients defined in their recipe. Review recipe quantities when cost, portion or serving method changes.

Receiving and transfers

Record supplier receipt, outlet transfer and return under the correct item, unit, quantity and location.

Waste and adjustment

Record spillage, breakage, spoilage, complimentary use and count corrections with an approved reason.

High-control count

- ☐ Count open and sealed premium-spirit bottles.
- ☐ Count cases, cartons, kegs and fast-moving beer.
- ☐ Review high-value proteins and ingredients.
- ☐ Compare physical count with expected system stock.
- ☐ Investigate material variance before approval.

CHAPTER 9

Shift reconciliation and close

1. **Resolve active orders**
   Settle completed orders and move only authorised balances to the correct house-account process.

2. **Count settlement channels**
   Count cash and obtain transfer and POS/card totals from their source records.

3. **Compare expected and actual**
   Review the system totals against physical cash, bank credits and terminal reports.

4. **Record variance notes**
   Document shortages, overages, timing differences and unresolved transactions for manager review.

5. **Count controlled stock**
   Review open bottles, high-value items, waste and transfers according to outlet policy.

6. **Approve and distribute report**
   Manager reviews exceptions, closes the shift and sends the summary to the approved recipients.

Manager closing checklist

- [ ] All active orders resolved or authorised.
- [ ] Cash, transfer and POS/card totals reconciled.
- [ ] Voids, refunds and discounts reviewed.
- [ ] Open bottles and controlled stock counted.
- [ ] Waste, spillage and adjustments have reasons.
- [ ] Kitchen/bar tickets are cleared.

- ☐ Pending WhatsApp or takeaway orders reviewed.
- ☐ Variance notes completed before approval.

CHAPTER 10

Management reports and review rhythm

Frequency	Review	Questions
Every shift	Sales, payments, open orders, voids, refunds, discounts and variance	Does every settlement source agree with the system?
Daily	Item sales, stock movement, waste, controlled-item count and staff activity	Which differences require follow-up before the next shift?
Weekly	Top sellers, gross margin, stock usage, slow items and supplier receipts	Are pricing, portion, recipe or purchasing changes needed?
Monthly	Outlet comparison, sales trend, inventory variance and role/access review	Where should management tighten process or training?

> **Use reports to ask operational questions.** A sales total alone does not explain payment variance, stock movement, waste, service delay or staff exceptions.

CHAPTER 11

Common issues and recovery

Order missing from kitchen/bar

1. Confirm the order was sent.
2. Check production area routing.
3. Check display/printer connection.
4. Record the order number before escalation.

Transfer not confirmed

1. Do not mark paid.
2. Check the approved bank channel.
3. Leave the order pending where appropriate.
4. Escalate with order and payment reference.

Stock does not match

1. Check item unit and location.
2. Review receipts, transfers and waste.
3. Review recipes and recent sales.
4. Count again before adjustment.

User cannot perform an action

1. Confirm the correct user is signed in.
2. Check assigned role.
3. Ask a manager to approve restricted work.
4. Do not share a higher-level PIN.

Offline or unstable connection: follow the configured outlet procedure. Do not duplicate transactions while waiting for confirmation. Record order/time details before contacting support.

CHAPTER 12

Training, go-live and support preparation

Suggested training sequence

1. Managers and configuration owners
2. Cashiers and servers
3. Kitchen and bar teams
4. Stock and finance reviewers
5. Full opening-to-close practice shift

Before contacting support

- Outlet and user role
- Order, ticket or item reference
- Exact action attempted
- Time the issue occurred
- Screenshot or visible error text
- Whether other users are affected

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Our team provides guided onboarding and support to help your staff use the configured workflow. Response and resolution depend on issue type, access and operating conditions; this manual does not create a guaranteed response-time commitment.