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## STEP 4 CONFIGURATION WIZARD

The software needs some basic information about the site and the first user before KitMan can run.

### Notes on Firewalls

KitMan regularly connects to the Internet to check for:

- Software updates
- Licence updates including expiry date and package details
- Backup and Price Updates if applicable

The main PC the software is installed on needs to have Internet connection or the software cannot update and the licence may expire very quickly leaving KitMan in a read only mode.

If you see messages like these or a similar one from Windows Firewall please allow the connection.

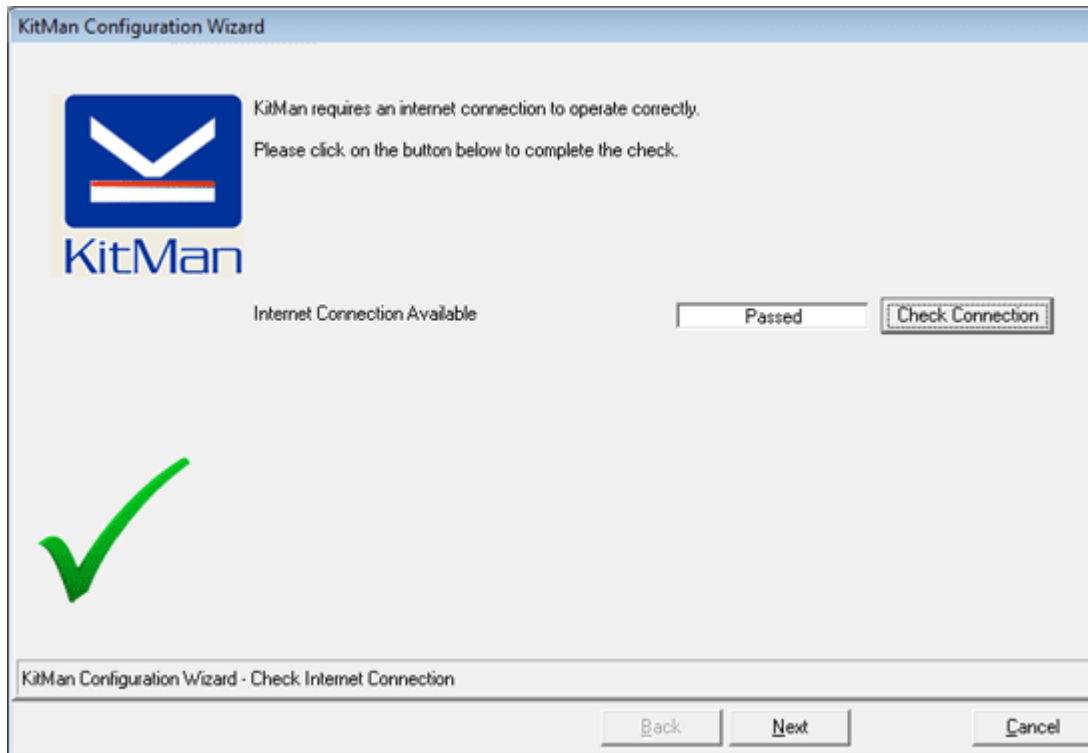




For larger organisations there may be a separate Firewall on your network. Your IT staff need to permit access to kitman.com and kitmansoftware.co.uk

For backup to work the main PC also needs FTP permissions.

## Step 4.1 Check Internet Connection



The first step is to check the software has an Internet connection.

Click **Check Connection**

If any Firewall messages pop up at this stage please allow the connection, see above for more information.

## Step 4.2 Validate Trial Details



KitMan Configuration Wizard

Registered Trial Details

Please enter the Email Address and Password used when registering and the Trial Code sent via email.

Email:  \*

Password:  \*

Trial Code:  \*

Check Trial Details:

Don't have any trial details? Simply click here to register: <http://www.kitman.com/downloadtrial/>

KitMan Configuration Wizard - Trial Details Required

Enter the Email Address and Password that you registered with then the Trial Code you received by email and click **Check Trial**.

## Step 4.3 Outlet Information

Please enter the name and address of your establishment.

KitMan Configuration Wizard

Name and Address Details of your establishment.

Please enter as many details of your establishment as possible. Please note the following are required: Name, 1st Address Line, City, County/State, Postcode/Zipcode and VAT/Tax Rate

Outlet Name:  \*

Address:  \*

City:  \*

County/State:  \*

Postcode/Zipcode:  \*

Country:  \*

VAT/Tax Rate:  \*

Check Outlet Details:

KitMan Configuration Wizard - Establishment Details

The boxes marked with an asterisk are required.



## Step 4.4 User Information

The screenshot shows the 'KitMan Configuration Wizard' window at the 'Username' step. On the left is the KitMan logo. The main text reads 'KitMan Username' and 'Please choose a username for accessing the system. Please note it can be no more than 10 characters long.' Below this is a text input field containing 'demouser' with a red asterisk to its right. Underneath is a 'Check Username Details:' label followed by a button labeled 'Passed'. A large green checkmark is positioned on the left side of the window. At the bottom, there are 'Back', 'Next', and 'Cancel' buttons.

Please enter a Username, no spaces are allowed, the password will be the one used when registering for the trial.

## Step 4.5 Complete Wizard

The screenshot shows the 'KitMan Configuration Wizard' window at the 'Complete Setup' step. On the left is the KitMan logo. The main text reads 'Information Complete and Validated.' and 'All of the details have now been entered and we are now able to complete the setup.' Below this is a list of tasks, each with a 'Waiting' button:

Setup Trial	Waiting
Update Country	Waiting
Update Outlet	Waiting
Download Test Database	Waiting
Set Main Machine	Waiting
Create User	Waiting
Complete Config	Waiting
Write Licence	Waiting

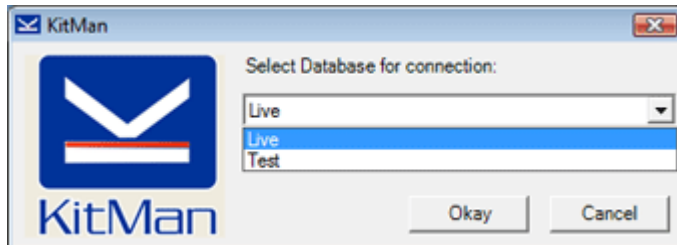
To the right of this list is a 'Complete Setup' button. At the bottom, there are 'Back', 'Next', and 'Cancel' buttons.



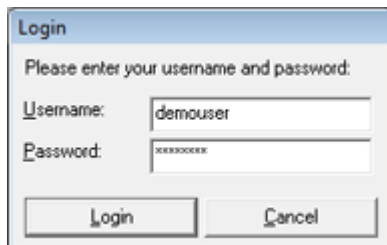
Click **Complete Setup** to finish configuring the software. Once this is complete clicking Finish will close the software.

## Step 4.6 Launch Software

Double click on the KitMan Logo or select Start: Programs: KitMan to open the Program.



A select box allows you to choose between the live data and the test data



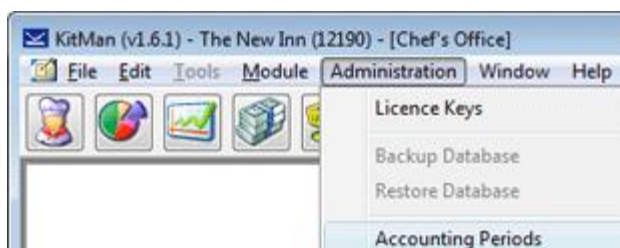
Login using the Username you setup during the configuration wizard and Password when registering online.

## STEP 5 SETUP ACCOUNTING PERIODS

KitMan should be configured to match as closely as possible your accounting periods so that it reports in a similar way to your other systems.

Please Note:

1. There is a chance to check them but once created these cannot be changed.
2. When creating Purchase Orders you can edit or place an order for a whole week. If you select 'calendar months' then the week at the month end may be split between two periods.



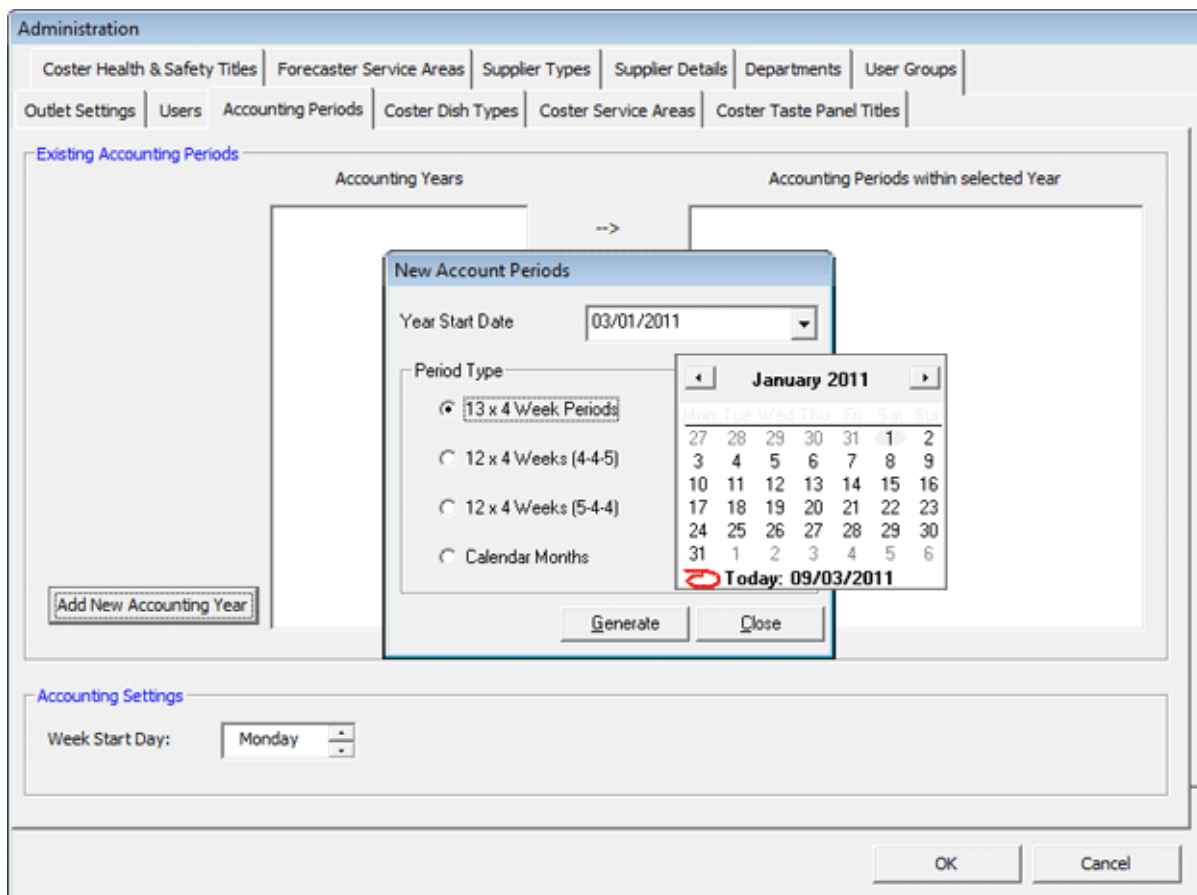
To set these up select from the Administration Menu: Accounting Periods.

## Step 5.1 Select Type of Period

The dates will be empty so need setting up before using many of the KitMan Modules.

The screenshot shows the 'Administration' window in KitMan. At the top, there are several tabs: 'Coster Health & Safety Titles', 'Forecaster Service Areas', 'Supplier Types', 'Supplier Details', 'Departments', 'User Groups', 'Outlet Settings', 'Users', 'Accounting Periods', 'Coster Dish Types', 'Coster Service Areas', and 'Coster Taste Panel Titles'. The 'Accounting Periods' tab is selected. Below the tabs, there is a section titled 'Existing Accounting Periods' which contains two empty boxes: 'Accounting Years' on the left and 'Accounting Periods within selected Year' on the right, with a double arrow '-->' between them. An 'Add New Accounting Year' button is located at the bottom left of this section. Below this is the 'Accounting Settings' section, which includes a 'Week Start Day:' label and a dropdown menu currently set to 'Monday'. At the bottom right of the window are 'OK' and 'Cancel' buttons.

Firstly select the day of the week you want your weeks to start, by default this is Monday then click **Add New Accounting Year**.



Click on the Date and a calendar will appear, you can then select the date your **current** financial year started. Even if there are only a few days left in your year always create the current one then create subsequent years.

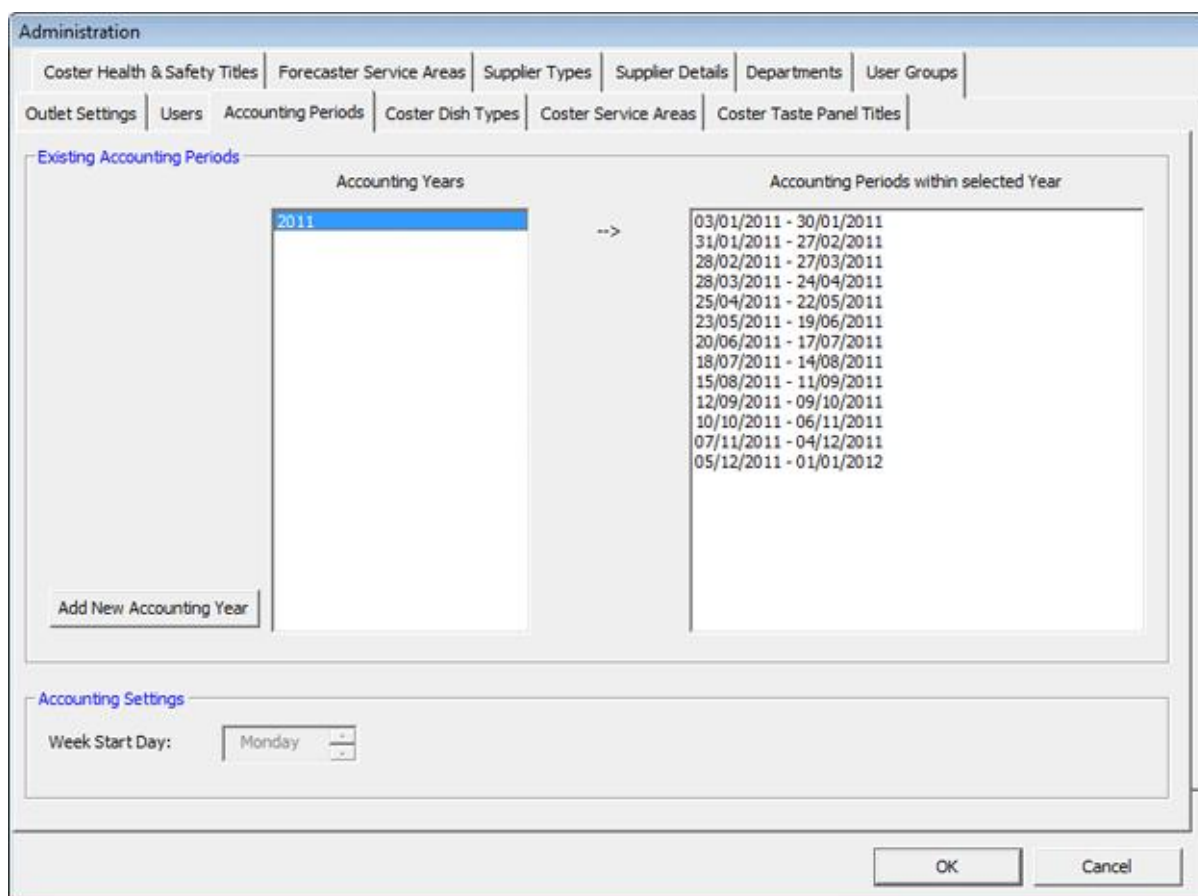
Then select the way you want to break the periods up.

- 13 x 4 Week Periods      52 weeks split into 13 equal periods
- 12 x 4 Weeks (4-4-5)      Four quarters of 4 weeks, 4 weeks then 5 weeks, approximates calendar months
- 12 x 4 Weeks (5-4-4)      Four quarters of 5 weeks, 4 weeks then 4 weeks, approximates calendar months
- Calendar Months

Then click **Generate**

## Step 5.2 Confirm Dates

You can review the dates before committing any changes.







Clicking on the Year on the left you can check the dates created.






If you have made a mistake press **Cancel** to start again or click **OK** to save the dates.

Repeat these steps to create subsequent years.

## KITMAN MODULES

Icon	Module	Purpose
	<b>Coster</b>	Create Recipes, search, view and print individual recipes Cost Recipes for multiple service areas.
	<b>Forecaster</b>	Help Forecast future business, calculate a food budget based on booked and anticipated business.
	<b>Sales Tracker</b>	Track actual sales, compare with the above forecast.
	<b>Purchase Tracker</b>	Track actual purchases, calculate profitability on a daily basis, period and year to date, compare year on year performance.



	<b>Purchase Order</b>	Raise individual supplier Purchase Orders, receive deliveries and match invoices.
	<b>Stock Take</b>	Record a Stock Take for a given date in time.
	<b>Menu Module</b>	Design, Cost and Export a number of different Menus from the Recipes already created.
	<b>KitMan Online</b>	Web based internal requisition system, not included in the downloadable version.
	<b>Chef's Office</b>	Back to the start up page. Along the bottom there are links to various support guides, forms, templates, links etc.

## STEP 6 NEXT STEPS

To start you off we have already entered a number of common products and recipes.

The software is now ready to use, depending on your priorities the next steps over the start of the trial is to setup the following.

### Data setup to get you started

#### Setup Forecaster Service Areas

#### Setup Coster Service Areas

#### Setup Suppliers

#### Setup Products

#### Create Recipes

#### Create Menus

#### Setup Additional Users

There are specific articles in the KitMan Blog and Userguide that explain these in more depth along with further hints and tips that are regularly updated.

## TRAINING COPY

Please Note: It is read only so no changes can be saved. Your login details have been copied to the training site but if any one else want to use it they must login with the username: **demo** and the password: **demo**.

This has data completed for a full two years so you can see examples of how to fill in the information.

# KITMAN DOWNLOAD HELP

