



Aspect Software, Inc.
Back-office software for restaurateurs

Aspect Software Users Manual

Budgets

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How To: Budget

SALES

Entering Budgets

First, you will need to add a line to the Daily Sales report where you can enter your budgets. To do this, select Sales Setup from the Settings Menu and then Sales Record Setup. Scroll down to the bottom and find a line with no description. Double-click on this line and enter 'Sales Budget' as the description. It must be named exactly 'Sales Budget'. Press Ok.

Next, select Sales Setup from the Settings Menu and then Sales Input Setup. Find a blank line around row 15 or so and double-click on it. Enter 'Sales Budget' as the description and select 'Sales Budget' in the first drop-down list. Press Ok and close this window. Make sure to answer yes when prompted to save your changes.

If you select Edit Daily Sales from the Sales menu, you should now see a line where you can enter your sales budget. Click the arrow to the right at the top of the window to move forward day by day and enter the sales budget for each day.

How can I created Projected Sales (Budget) based on historical data (Weighted Average)?

First, you will need to add a line to the Daily Sales report where you can enter your projected sales. To do this, select Sales Setup from the Settings Menu and then Sales Record Setup. Scroll down to the bottom and find a line with no description. Double-click on this line and enter 'Projected Net Sales' as the description. It must be named exactly 'Projected Net Sales'. Change the Input type to Calculated Total and in the Field box, put the corresponding Field number for "Net Sales". Press Ok and right-click anywhere on the window. Select Adjust Projections from the pop-up menu and make sure that 'Method' is set to 'Weighted Average'.

In the Weighted Average box, you have the capability to set projections based on historical data for up to five (5) periods. Under the section for Enable, click on the boxes for the period you want to enable. Next, choose the period, for instance 1 Week. Next, set an adjustment factor, if any. Finally, set the Weight of the period, for instance 1. When done, hit OK and close the Sales Record.

An example of projecting weighted average for net sales and all corresponding sales data for three historical weeks would have three boxes enabled. The first box would be set to 1 Week with a Weight of 1, the second box would be set to 2 week with a Weight of 1 and the third box would be set to 3 week with a Weight of 1. By entering in 1 week, 2 week, and 3 week, you are telling Aspect to historically search for data covering three (3) weeks with an equal weighted average.

SCHEDULE / PAYROLL

Entering Budgets

To enter budgets, right-click anywhere on the schedule and select Budget from the pop-up menu. Aspect will open a new window showing totals by day for each schedule. Budgets are entered by day for each schedule. For example, you will enter a Bar budget for Monday, Tuesday, Wednesday, etc.

To enter or change a budget, double-click the line containing the budget and enter budgeted pay for

the selected day. Press the Tab key to enter budgeted hours, if desired, and select Ok to save the budget.

You can change the display from budgeted pay to budgeted hours and visa versa by pressing the Display button. Current versions of Aspect also include a display for projected labor percentages. For information on viewing projected labor percentages, see the topic named 'FAQ: Labor & Scheduling.

How can I view projected labor percentages when I create an employee schedule?

First, you will need to add a line to the Daily Sales report where you can enter your projected sales. To do this, select Sales Setup from the Settings Menu and then Sales Record Setup. Scroll down to the bottom and find a line with no description. Double-click on this line and enter 'Projected Net Sales' as the description. It must be named exactly 'Projected Net Sales'. Press Ok and right-click anywhere on the window. Select Adjust Projections from the pop-up menu and make sure that 'Method' is set to 'No Projection'. Press Ok and close the sales record window.

Next, select Sales Setup from the Settings Menu and then Sales Input Setup. Find a blank line around row 15 or so and double-click on it. Enter 'Projected Sales' as the description and select 'Projected Net Sales' in the first drop-down list. Press Ok and close this window. Make sure to answer yes when prompted to save your changes.

If you select Edit Daily Sales from the Sales menu, you should now see a line where you can enter your projected net sales. Click the arrow to the right at the top of the window to move forward day by day and enter the projected sales for each day.

To view projected labor percentages, open the employee schedule, right-click anywhere on the schedule and select Budget. Click on the Display button and change the display to 'Projected Labor Percentages'.

If you use the project sales option in the sales record, it will not project sales for the current day. You might see a situation where the projected sales remain in the sales record until they are replaced with actual numbers but you cannot count on it. The only way you're going to be able to get projections to stick is if they are entered manually or if they are a calculation that you create yourself based on past figures. Here are two approaches you can take:

1. Create a USER-INPUT field in the sales record named "Projected Net Sales". Someone will need to be responsible for editing the Daily Sales window for days in the future to enter the projected sales figure.
2. Create a CALCULATED field in the sales record named "Projected Net Sales" and base it on past sales. Here's how you would do that:

You can use a calculated total in the sales record to access past data by using a formula like "&7,100". This formula would be equal to line 100 in the sales record from 7 days ago. Suppose your net sales field was on line 100 and you wanted to average the last 2 weeks to get a projection. Also suppose that you started defining these fields on line 200 of the sales record. The fields would look like:

200 Sales Two Weeks Ago - &14,100 (gets sales from 14 days ago)
201 Sales One Week Ago - &7,100 (gets sales from 7 days ago)
202 Total Past Sales - 200+201 (adds the two together)
203 Projected Net Sales 202/2 (divides by 2 to get the average)

You could add any number of past weeks you wanted to. You could also use &364,100 to get sales for the same day of the week from one year ago.

