



backbook

Accurate. Consistent. Efficient.

Paperless ordering and inventory management for the modern restaurant

Background - Rick Webb



- Backbook founder
- Restaurant business for 40 years
 - Lexington 1990-1998
 - Ciao Bella 1997-current
 - Zelo 1999-current
 - Bacio Sold
- Country Club member
 - Edina C.C. 30 years
 - Somerset C.C. 15 years

Problem



2:00 PM on Monday June 1, 2015

Building the Solution



- Use one system for ordering - no vendor portals
- Compile ordering worksheets and send - no phone calls or paper
- Receive invoices digitally - no hand keying
- Associate items one-time to general ledger code - no redundant coding
- Easy to learn, use and maintain
- Integrate with our accounting system
- Integrate with our food & beverage costing system
- Test with Johnson Brothers companies - vendor partner

Building the Solution



When Backbook integrated ordering and invoicing with Johnson Brothers both parties knew we were going to forever change the relationship between vendors and customers... **in a good way!**

Continuing to Build the Solution



- Added inventory capability based on Pool & Yacht requirement
- Completed Beta Site testing in June 2019
- 60,000 items ordered without an error
- \$1m spent for product development and beta sites
- **Tried. Tested. Proven.**

Beta Sites

Ciao Bella

Zelo

Keys Cafe

Whiteys

Rojo

Pool & Yacht

Background - Paul Lundberg



- Backbook founder & CTO
 - Product Vision & Architecture
 - Product Management
 - Team Building

- Software Engineering for 32 years
 - IBM 6 years
 - MCI 2 years
 - Camworks/Zamba 7 years
 - Vocabra 10 years
 - Agosto Holdings 7 years - current Co-founder & CTO

Integrations



Food & Beverage

- Johnson Brothers*
- US Foods*
- Sysco
- Edward Don
- Southern
- Breakthru
- The Wine Company
- Paustis Wine
- Winebow
- Bix Produce
- Reinhart
- Greco & Sons

Club Systems

- Jonas Club
- Club Essentials
- TAI
- ForeTees

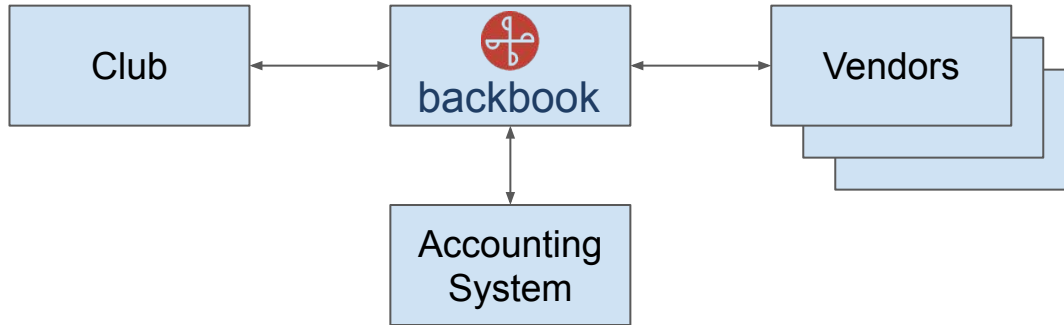
Accounting

- QuickBooks Desktop
- QuickBooks Online
- Business Works
- Intacct

The Future

- Changing Relationships with Vendors
 - Fully integrated ordering
 - No vendor portals
 - Sales Reps are now Sales Consultants
 - Fully integrated invoicing
 - Automate paper Bill of Lading
- Digital File Cabinet
 - Searchable access to look at invoices
 - Searchable access to support audit
- All Software Moving from On Premise to Cloud
 - Accounting
 - POS
 - Food Costing

Backbook Setup



- Free setup for clubs through February 2020
- Setup vendors
 - Setup email address and notifications
- Setup iPad with club ordering guide - beverage, food, and other items
 - Associate club items to vendor items
- Setup general ledger codes
 - Associate general ledger codes to beverage and food items
- Setup iPad with inventory guide
- Training for add/change/delete items
- On site for first two orders

Background - Eileen Lundberg



- **Backbook - COO**
 - Product Management
 - Product Development Lead
 - Customer Onboarding Experience
- **Accountant (CPA) for 33 years**
 - Cargill 13 years
 - Hallmark Cards 15 years
 - Consulting 5 years



Home > Create Purchase Orders

+ Create purchase orders

<input type="checkbox"/> Worksheet name	Total item count	<input type="text" value=""/>
1 Wine - BTG	0	NEW
2 Wine - Bottles	0	NEW
3 Beer Cooler	0	NEW
4 Liquor Room	0	NEW
5 Dry Storage	0	NEW
6 Walk-in Cooler	0	NEW
7 Freezer	0	NEW
8 Cleaning Supplies	0	NEW
9 Plateware, Silverware and Glassware	0	NEW

Home > Create Purchase Orders > worksheet

1 Wine - BTG worksheet

Work Offline

Quantity	Item	Par	Order Unit	Vendor	Cost	Ordering History	
<input type="text"/>	Whitehall Lane, Cabernet order by case	0.0	Case	Paustis & Sons	\$240.00 Nov 07, 2019	1 / 0 / 1 / 1	⋮
1	Hess Shirtail Ranches Cab order by the case	0.0	Case	Phillips Wine & Spirits	\$132.00 Nov 05, 2019	2 / 3 / 4 / 3	⋮
1	Meiomi, Pinot Noir Order by case	0.0	Case	Johnson Brothers Liquor Co.	\$206.76 Nov 05, 2019	0 / 3 / 3 / 4	⋮
1	Belle Glos Dairyman Pinot Noir Order By Case	0.0	Case	Grape Beginnings	\$240.00 Nov 05, 2019	0 / 2 / 2 / 2	⋮
<input type="text"/>	Villa Antinori Rosso order by case	0.0	Case	Southern Wine & Spirits of MN	\$180.00 Oct 29, 2019	0 / 0 / 0 / 1	⋮
1	Kendall Jackson Chardonnay order by case	0.0	Case	Breakthru Bev MN Wines (Wirtz)	\$114.00 Nov 05, 2019	0 / 4 / 3 / 2	⋮
<input type="text"/>	Dr. Loosen Riesling order by case	0.0	Case	The Wine Company	\$96.00 Nov 06, 2019	0 / 0 / 1 / 1	⋮
<input type="text"/>	Astoria Prosecco Splits 24/187ml/cs - order by case	0.0	Case	Wine Merchants	\$79.50 Nov 05, 2019	0 / 0 / 2 / 2	⋮

Home > Purchase Orders

+ Add

↶ Send

🔄 Refresh

Start date

mm/dd/yyyy

End date

mm/dd/yyyy

Reset

Showing 1 - 10 out of 160 records

First « 1 2 3 4 5 6 7 8 9 10 ... 16 » Last

Vendor	Order number	Amount	Created by	Ordered	Item count	Status	
<input type="checkbox"/> Johnson Brothers Liquor Co.	CC450C55	206.76	Eileen Lundberg	Nov 10, 2019 at 12:45:48 PM	1	PENDING	
<input type="checkbox"/> Phillips Wine & Spirits	5C15B098	132.00	Eileen Lundberg	Nov 10, 2019 at 12:45:48 PM	1	PENDING	
<input type="checkbox"/> Breakthru Bev MN Wines (Wirtz)	776ABEEB	114.00	Eileen Lundberg	Nov 10, 2019 at 12:45:48 PM	1	PENDING	
<input type="checkbox"/> Grape Beginnings	7E6A1D6D	240.00	Eileen Lundberg	Nov 10, 2019 at 12:45:48 PM	1	PENDING	

First « 1 2 3 4 5 6 7 8 9 10 ... 16 » Last

Home > Invoices

Export Type: ▾ **Export** Start date: End date: **Reset**

Showing 1 - 10 out of 59 records

First « 1 2 3 4 5 6 » Last

	Invoice Number ▾	Vendor ▾	Invoice Total ▾	Date ▾	Type ▾	Export Status		
						Food Costing ▾	Accounting ▾	
<input type="checkbox"/>								
<input type="checkbox"/>	2671212	Johnson Brothers Liquor Co.	620.28	11/08/2019	INVOICE	IN PROGRESS	IN PROGRESS	
<input type="checkbox"/>	68658	Paustis & Sons	240.00	11/07/2019	INVOICE	APPROVED	APPROVED	
<input type="checkbox"/>	124179	The Wine Company	96.00	11/06/2019	INVOICE	APPROVED	APPROVED	
<input type="checkbox"/>	1464980	Johnson Brothers Liquor Co.	620.28	11/05/2019	INVOICE	APPROVED	APPROVED	
<input type="checkbox"/>	2646230	Phillips Wine & Spirits	396.00	11/05/2019	INVOICE	APPROVED	APPROVED	
<input type="checkbox"/>	MN00068427	Grape Beginnings	480.00	11/05/2019	INVOICE	APPROVED	APPROVED	
<input type="checkbox"/>	2646231	Phillips Wine & Spirits	528.00	11/05/2019	INVOICE	IN PROGRESS	IN PROGRESS	
<input type="checkbox"/>	1081045895	Breakthru Bev MN Wines (Wirtz)	342.00	11/05/2019	INVOICE	APPROVED	APPROVED	
<input type="checkbox"/>	7258366	Wine Merchants	159.00	11/05/2019	INVOICE	APPROVED	APPROVED	
<input type="checkbox"/>	2222	J.J. Taylor Distributing MN	60.20	11/01/2019	INVOICE	APPROVED	EXPORTED 11/01/2019	

Results per page: 10 ▾ First « 1 2 3 4 5 6 » Last

Home > Fill Out Inventory Worksheet

Date	Status	Updated
Oct 31, 2019	IN PROGRESS	Oct 31, 2019 at 01:38:33 PM
Sep 30, 2019	COMPLETE	Oct 10, 2019 at 01:34:04 PM

[Export to CSV](#)

Status

All



<input type="checkbox"/>	Worksheets: Oct 31, 2019	Total Count	Status	Updated
<input type="checkbox"/>	1 Bar - Main	0	NEW	Oct 31, 2019 at 01:38:33 PM
<input type="checkbox"/>	2 Bar - Patio	0	NEW	Oct 31, 2019 at 01:38:33 PM
<input type="checkbox"/>	3 Wine Room	0	NEW	Oct 31, 2019 at 01:38:33 PM
<input type="checkbox"/>	4 Liquor Room	0	NEW	Oct 31, 2019 at 01:38:33 PM
<input type="checkbox"/>	5 Dry Storage	0	NEW	Oct 31, 2019 at 01:38:33 PM
<input type="checkbox"/>	6 Walk-in Cooler	0	NEW	Oct 31, 2019 at 01:38:33 PM
<input type="checkbox"/>	7 Freezer	0	NEW	Oct 31, 2019 at 01:38:33 PM
<input type="checkbox"/>	8 Line	0	NEW	Oct 31, 2019 at 01:38:33 PM

[Home](#) > [Fill Out Inventory Worksheet](#) > 1 Bar - Main[Work Offline](#)[Finish Later](#)[Complete](#)[Clear](#)[Copy all previous inventory](#)

Previous	On Hand	Unit	Total Quantity	Item
3.5	<input type="text" value="4.5"/>	+ Bottle	4.50	Justin Cabernet, Case order by case
5	<input type="text" value="8"/>	+ Bottle	8.00	Fransican Cabernet, Case order by case
7.5	<input type="text" value="7"/>	+ Bottle	7.00	Whitehall Lane, Cabernet order by case
3	<input type="text" value="2"/>	+ Bottle	2.00	Frank Family Cabernet Order by Case
3.5	<input type="text" value="3.5"/>	+ Bottle	3.50	Orin Swift Saldo, Zinfandel order by case
4.5	<input type="text" value="4.5"/>	+ Bottle	4.50	The Federalist Zinfandel Order by the Case
5.5	<input type="text" value="5.5"/>	+ Bottle	5.50	Villa Caffagio Chianti, Case order by case
6	<input type="text" value="18"/>	+ Bottle	18.00	Robert Mondavi Pinot Noir, Case order by case
5.5	<input type="text" value="5.5"/>	+ Bottle	5.50	Meiomi, Pinot Noir Order by case
3.5	<input type="text" value="3.5"/>	+ Bottle	3.50	Stags Leap Artemis Cabernet, Case order by case
2.5	<input type="text" value="2.5"/>	+ Bottle	2.50	Spell, Pinot Noir order by case

Hess Shirtail Ranches Cab: Current extension details

Receive Date	Invoice Number	Vendor	Order Unit	Invoice Quantity	Extended Net Price	Pack Value	Shipping	Sales Tax	Extended Unit Price	Included in Inventory	Inventory Value
10/29/2019	2639876	Phillips Wine & Spirits	Case	1.00	\$122.00	12.00	\$0.00	\$0.00	\$10.17	12.00	\$122.00
10/22/2019	2626789	Phillips Wine & Spirits	Case	3.00	\$396.00	12.00	\$0.00	\$0.00	\$11.00	2.00	\$22.00

Close

Grocery Total												\$0.00
^ Liquor												
Liquor Total												\$2,329.92
^ Seafood												
Seafood Total												\$0.00
^ Soft Drinks												
Soft Drinks Total						\$591.29				\$558.49		\$32.79

Wine											
Astoria Prosecco Splits	Bottle	21.0	\$3.31	\$69.56	0.0	\$0.00	\$0.00	21.0	\$69.56		
Belle Glos Dairyman Pinot Noir	Bottle	18.5	\$20.00	\$370.00	3.5	\$20.00	\$70.00	15.0	\$300.00		
Chandon Brut, Case	Bottle	3.0	\$17.00	\$51.00	3.0	\$17.00	\$51.00	0.0	\$0.00		
Conquista Malbec, Case	Bottle	3.5	\$7.83	\$27.41	2.5	\$7.83	\$19.58	1.0	\$7.83		
Dr. Loosen Riesling	Bottle	9.0	\$8.00	\$72.00	5.0	\$8.00	\$40.00	4.0	\$32.00		
Emmolo Sauv Blanc	Bottle	3.0	\$13.08	\$39.24	3.0	\$13.08	\$39.24	0.0	\$0.00		
Ferrari Carano Siena, Case	Bottle	2.5	\$144.00	\$360.00	2.5	\$144.00	\$360.00	0.0	\$0.00		
Flowers Perennial, Case	Bottle	1.5	\$0.00	\$0.00	2.5	\$0.00	\$0.00	-1.0	\$0.00		
Frank Family Cabernet	Bottle	2.0	\$27.00	\$54.00	3.0	\$27.00	\$81.00	-1.0	-\$27.00		
Fransican Cabernet, Case	Bottle	8.0	\$12.50	\$100.00	5.0	\$12.50	\$62.50	3.0	\$37.50		
Gaja Sito Moresco	Bottle	1.5	\$0.00	\$0.00	1.5	\$0.00	\$0.00	0.0	\$0.00		
Hess Shirtail Ranches Cab	Bottle	14.0	\$10.29	\$144.00	0.0	\$0.00	\$0.00	14.0	\$144.00		
Justin Cabernet, Case	Bottle	4.5	\$16.00	\$72.00	3.5	\$16.00	\$56.00	1.0	\$16.00		
Kendall Jackson Chardonnay	Bottle	17.5	\$9.50	\$166.25	5.5	\$9.50	\$52.25	12.0	\$114.00		

Demo Restaurant Food Costing Report

October 2019

Generated November 2, 2019 at 14:19 (CDT)

	Oct. 1, 2019 Beginning Inventory	Purchases	Oct. 31, 2019 Ending Inventory	Actual Costs	Actual Sales	Actual % of Sales
Beverage						
Beer	282.64	306.26	229.26	359.64	1,834.38	19.61%
Liquor	2,182.33	967.65	1,955.88	1,194.10	4,515.80	26.44%
Soft Drinks	264.53	228.73	319.31	173.95	1,663.13	10.46%
Wine	16,209.08	4,207.83	16,780.89	3,636.02	10,024.93	36.27%
Total Beverage	18,938.58	5,710.47	19,285.34	5,363.71	18,038.24	29.74%
Grand Total	18,938.58	5,710.47	19,285.34	5,363.71	18,038.24	29.74%

Getting Started

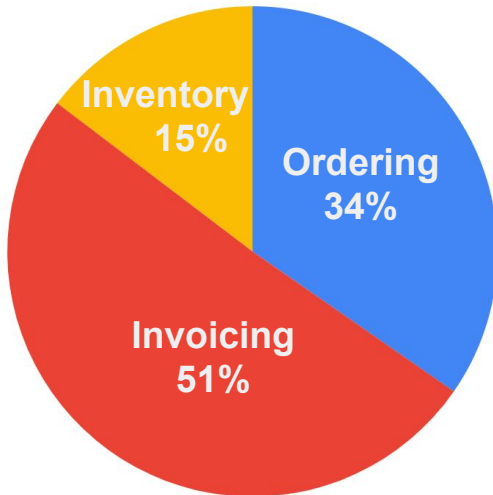


1. Order Wine
2. Order All Beverage
3. Order All Food
4. Order non Food & Bev items
5. Integrate Invoice or convert PO to Invoice
6. Inventory

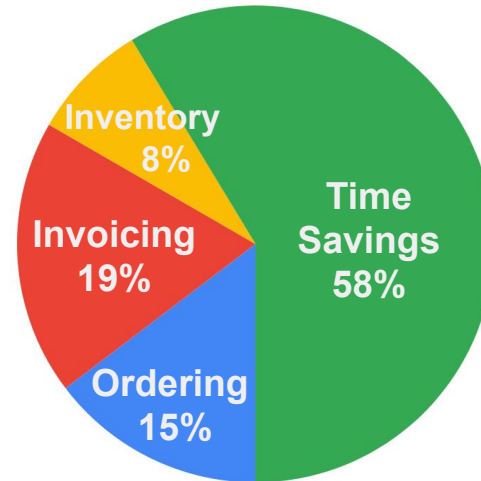
* fully automated after completing 1-6

Accounts Payable Example - Ciao Bella

Before



After



Backbook Pricing



- 2 month Free Trial with Customized Onboarding
- \$100 / month for Beverage
- \$250 / month for Beverage, Food, Supplies
- Includes
 - Customized Setup and Configuration
 - Inventory
 - Accounting Integration
 - Vendor Integration (current and future)
 - PO Conversion to Invoice
 - Ongoing Software Updates

“I finally saw the thing that I knew existed somewhere”

Monika - Pizzeria Lola

“After using backbook, I would never go back”

Jamie - Ciao Bella

Testimonials



- Let's face facts... **Inventory and ordering product are necessary evils.** They are time consuming, inconvenient and tedious. Yet, as a significant metric used to measure the performance of my Club, they must be consistent and accurate.
- Backbook has taken the least favorite portion of my job and **significantly reduced the time** I need to spend on it.
- **I do not need to make calls to each salesperson** to place orders, Backbook interfaces with our major vendors, automatically places my orders and sends an email or text to my salesperson so they are kept in the loop.
- My favorite part is the inventory portion of Backbook. **What used to take 6 to 8 hours now takes under 2 hours. Inventory Pricing is updated and accurate.** The inventory is super **easy to navigate** and I get **instant numbers**.
- I highly recommend **backbook** software.

Maureen - Pool & Yacht Club



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