

HOW GENIE WORKS:

# Clients Guide

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# Accelerated collaboration through open communication

At Genie, we understand that the success of each partnership hinges on open communication, trust, and delivering real-time solutions tailored to your business's unique needs.

That's why we've crafted this guide to shed light on our operations, fostering a transparent, two-way conversation with those considering Genie as their business solution. Our commitment is to provide a clear description of how we operate, from your initial interaction with us, through the implementation process, and beyond.

We aim to show how we empower businesses to overcome their operational challenges, from stock ordering to compliance workflows. Your success is our success, and we're here to guide you every step of the way.



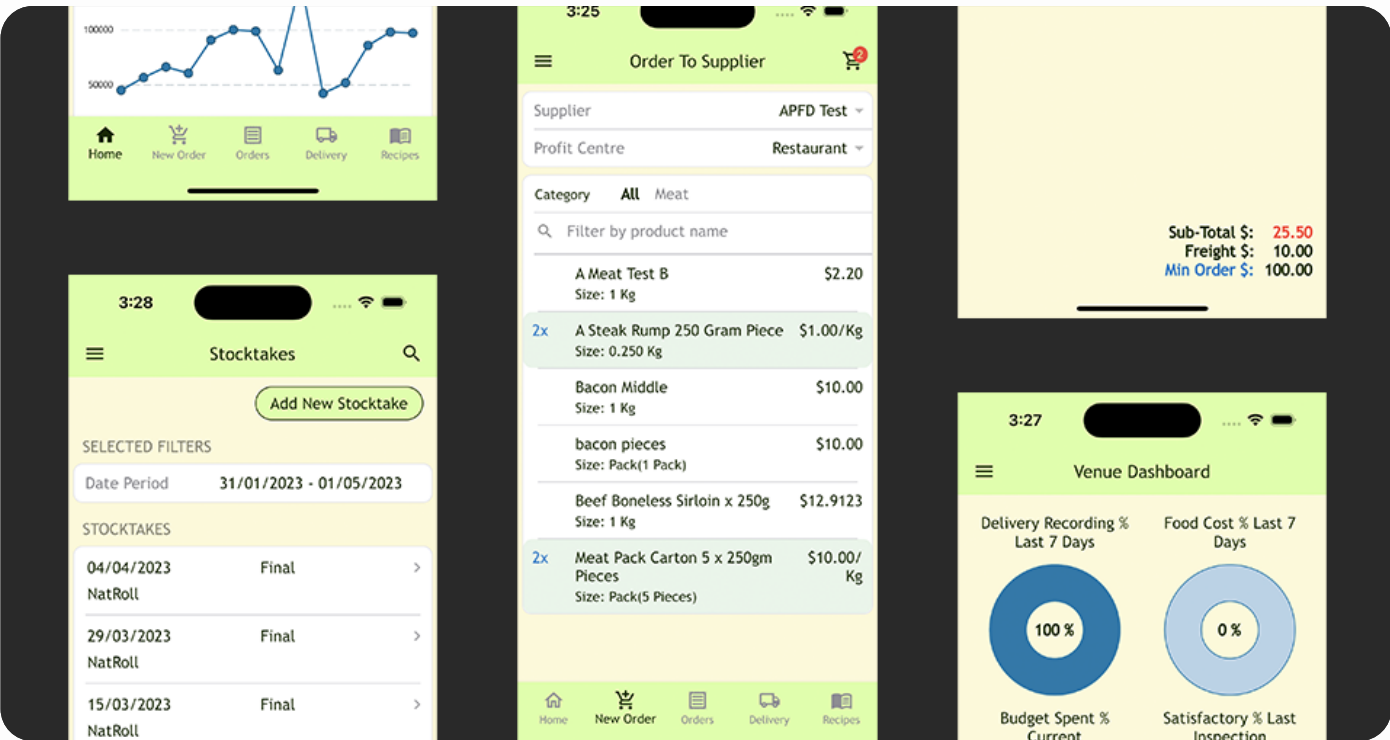
# Why work with Genie

## Expertise in Business Operations

Genie is not just a software solution; we’re a strategic partner for your business. Our expertise lies in offering a comprehensive suite of features designed to streamline your daily operations.

From stock ordering and supplier invoice matching to real-time data reporting and compliance workflows, Genie takes the hassle out of essential tasks, allowing you to focus on your core business. We are meticulous in our approach, just like when we bring new talent on board.

Every member of the Genie team goes through a rigorous selection process, ensuring they have the skills to provide you with a top-quality solution. With Genie, you’re not just getting software; you’re gaining a dedicated partner committed to your success.



## An individual approach to your business

At Genie, we recognize that every business is unique, with its distinct set of challenges and requirements. We understand that there's no one-size-fits-all solution to managing your business operations. That's why we take the time to immerse ourselves in your business and audience, delving deep to comprehend your operational challenges.

Our approach is tailored to your project's specific needs, ensuring that we develop the right strategies to address your challenges effectively. So you can rest assured, you're not just getting a generic solution; you're partnering with a team dedicated to understanding your individual needs and creating tailored approaches that work for your business.

# The ways we customize your Hospitality Genie and provide the value your business needs to thrive

## Industry expertise

Genie's industry expertise lies in its comprehensive understanding of various sectors, including hospitality, retail, healthcare, and more. With years of experience working closely with businesses across different industries, Genie has developed tailored solutions to address industry-specific challenges effectively.

Whether it's optimizing inventory management in a restaurant, ensuring compliance with healthcare regulations, or streamlining retail operations, Genie's platform is equipped with industry-specific features and functionalities to meet the unique needs of each sector.

Our team of experts continually monitor industry trends and regulations to ensure that Genie remains at the forefront of innovation and provides cutting-edge solutions to businesses across diverse industries.

# Our work processes: project kick-off & what happens next

## Project Launch

Genie's onboarding process is meticulously designed to ensure a smooth and seamless transition for new clients. Here's an overview of how it works:

**Initial Consultation:** The process typically begins with an initial consultation where our team gets to know the client's business, goals, and pain points. This allows us to understand their specific needs and tailor our approach accordingly.

**Customized Demo:** Based on the information gathered during the consultation, we provide a customized demo of the Genie platform, focusing on features and functionalities that align with the client's requirements. This gives them a firsthand look at how Genie can address their business challenges.

**Data Migration:** Once the client decides to proceed, we assist with data migration from their existing systems to Genie. Our team ensures that the transition is seamless and that all relevant data is accurately transferred to the new platform.

**Training and Support:** We provide comprehensive training sessions to familiarize the client and their team with the Genie platform. These sessions cover everything from basic navigation to advanced features, ensuring that users feel confident and empowered to make the most of Genie's capabilities. Additionally, our dedicated support team is available to answer any questions and provide assistance throughout the onboarding process.

**Ongoing Assistance:** Our commitment to client success doesn't end after onboarding. We continue to provide ongoing support and guidance to ensure that clients derive maximum value from Genie. Whether it's troubleshooting technical issues, optimizing workflows, or exploring new features, our team is always available to help clients every step of the way.

"Having totally transparent and agreed pricing is the key to the successful relationship between me and my suppliers — I simply won't have it any other way"

— Steve Sidd  
Brand Ambassador

# All the elements in your Hospitality Genie Toolbox

A comprehensive breakdown of all the tools Genie enables your business with

## Global Dashboard

Genie's Global Dashboard is a powerful feature designed to provide a centralized and comprehensive view of your business's operations. It's like having a control center that empowers you to make informed decisions with ease.

**Real-time Insights:** The Global Dashboard offers real-time data reporting, giving you instant access to critical information about your business. You can monitor stock levels, sales data, compliance statuses, and more, all in one place.

**Customization:** Genie allows you to tailor the dashboard to your specific needs. You can choose which metrics and data points are most relevant to your business, ensuring that you have a clear view of what matters most to you.

**Efficient Decision-Making:** With all the essential data at your fingertips, you can make quicker, more informed decisions. Whether it's optimizing stock levels, adjusting pricing, or ensuring compliance, the Global Dashboard streamlines your decision-making process.

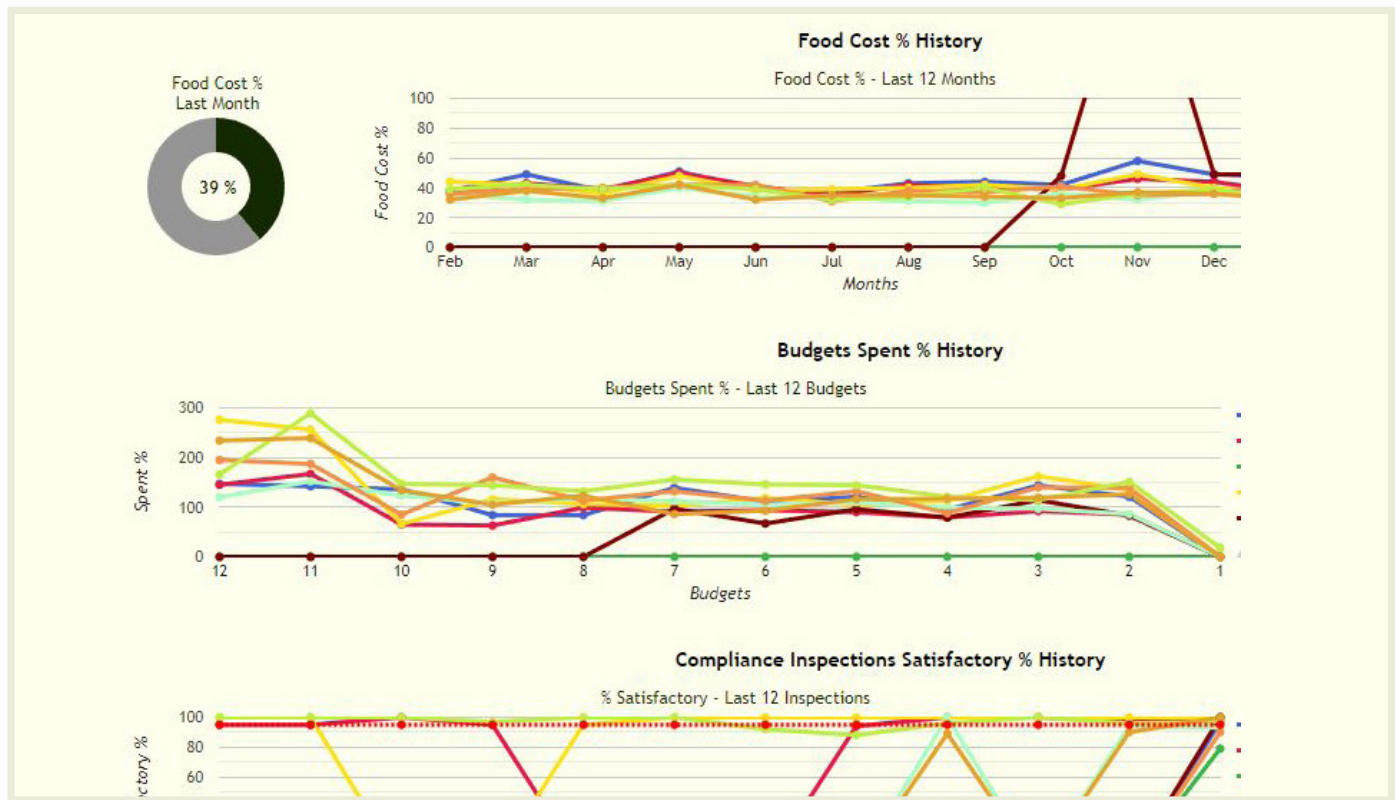
**Cross-Functional Insights:** It's not just for a specific department. The Global Dashboard provides insights into various aspects of your business, from supply chain and inventory management to sales and financial data. This holistic view promotes collaboration across different departments, creating a more integrated and efficient operation.

**Accessible Anywhere:** The dashboard is accessible from anywhere with an internet connection, allowing you to keep an eye on your business, whether you're in the office, on the go, or working remotely.

**Support for Growth:** As your business expands, the Global Dashboard grows with you. It accommodates increased data and helps you adapt your strategies to evolving circumstances.



**Data Visualization:** Genie's dashboard employs data visualization techniques such as graphs, charts, and tables to present information in a visually digestible format. This makes it easier for users to interpret and act on the data.



## Compliance Inspections

Genie's compliance inspections are the secret ingredient to ensuring that your business remains on the right side of regulations, every time. We understand the intricacies of compliance management, and our feature is designed to streamline the process. With Genie, you can effortlessly schedule, conduct, and record inspections, making it a breeze to maintain the high standards of quality and safety that your industry demands.

Whether it's food safety, health and safety, or any other compliance area, Genie's user-friendly interface and real-time reporting give you the peace of mind that comes with knowing your business is in compliance, always.

## Aged Care Management

Nutrition is everyone's business. Good food is essential for the physical, social and emotional wellbeing of our elderly in residential aged care. From clinical assessment experts, chefs preparing the daily meal service, to the care staff assisting during meal service, all have a responsibility to their residents for the food being prepared, served and consumed.

Genie simplifies the daily management of meal service from the kitchen to the dining room. Ensuring kitchen staff are provided with the correct recipes and ingredients for consistency in the day's meal service, quantity required and serving sizes for residents.

### Crispy Pork Belly



**Number Of Portions: 1**

#### Ingredients

0.250 units Carrot Dutch Bunch  
60 g Mushrooms Button Grade Box 4kg  
280 g Pork Belly Rind On  
120 g Potato Chats 20kg

#### Bulk Recipes

#### Allergies

#### Cooking Instructions

- Chopped mix mushrooms and cook with onion, garlic, salt and pepper
- For pea puree refer to previous menu recipe - HEAT up
- In a hot pan saute diced onion, garlic and diced chat potatoes, season
- For plate up, make a bed of pea puree (length ways) add 2 piece of Dutch carrots at one end
- Arrange sauteed potatoes and mushroom in the middle of the puree and then place pork on top

## Kitchen Productions

Genie is a game-changer when it comes to optimizing kitchen productions. It's like having a dedicated sous-chef that streamlines and enhances every aspect of the culinary process.

Here's how Genie can transform your kitchen operations:

**Stock Management:** Genie ensures your kitchen is always well-stocked. It automates stock ordering, keeps track of inventory levels, and sends alerts when it's time to restock. This means you never run out of essential ingredients, and there's no excess waste.

**Recipe Costing:** Genie helps you cost out your recipes with precision. It calculates the cost of each dish, factoring in every ingredient (including portions from your bulk recipes), helping you price your menu for profitability.

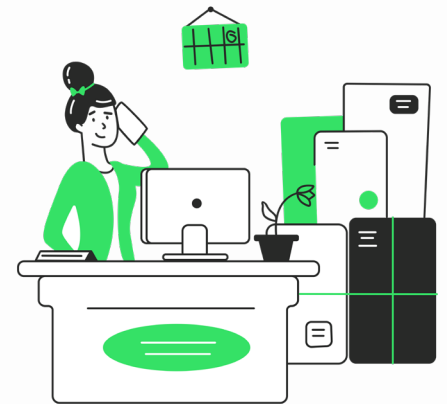
**Real-time Data:** The real-time data reporting feature provides instant insights into sales trends, customer preferences, and kitchen efficiency. This empowers you to make data-driven decisions, optimize your menu, and reduce food waste.

**Compliance:** With compliance workflows, Genie simplifies the process of adhering to food safety and health regulations. It ensures that your kitchen maintains the highest standards of quality and safety, reducing the risk of compliance-related issues.

**Supplier Invoice Matching:** Genie automates the matching of supplier invoices with orders, reducing the risk of errors and ensuring accurate accounting. It helps you keep a tight handle on your finances.

**Function and Event Management:** Genie is versatile, making it easy to manage functions and events. It helps you plan, coordinate, and execute catering orders and special events with precision.

**Efficiency:** By streamlining these processes, Genie liberates your kitchen staff from tedious administrative tasks. This enables your chefs and kitchen crew to focus on what they do best - creating exceptional culinary experiences for your customers.



**Genie doesn't just offer software; it's a culinary partner that enhances kitchen production efficiency, reduces waste, and empowers your team to deliver outstanding dishes and experiences consistently.**

## Daily Prep Lists

Genie's Daily Prep Lists are a dynamic tool that revolutionizes the way your kitchen operates. They are like a personalized to-do list for each day, meticulously designed to ensure your kitchen is always prepared and running smoothly.

By setting a PAR level for each of your menu items, Genie will calculate how much needs to be prepared per day as it updates the quantity at hand once the sales data is imported from your POS system.

## Genie Workflows

Genie workflows are like the guiding threads that help you navigate the complex tapestry of business operations with ease and efficiency. These workflows are a structured sequence of tasks and actions designed to automate, streamline, and standardize various processes within your business.

"I've increased sales by a staggering 26% in the peak time of year, by creating and scheduling daily workflow routines around busy service times. Using Genies Workflow APP, staff check in at the beginning of their shift and see where and when they're needed for tasks such as food prep, restocking, temperature checks, stock ordering and cleaning.

I've time stamped tasks to make sure their primary focus is on customer service during our busiest times, and I can check in to make sure task completion is being done - in real time. Workflows aren't just for Compliance management, they'll help you improve your customer service focus, general operations, and boost your profitability too."

*-Dawnian O'Reilly*  
MANAGING DIRECTOR  
CONCEPT CO

Internal Orders

Genie’s internal orders feature is a valuable tool for managing internal processes and resource allocation within your business.

It enables you to efficiently request, approve, and track internal orders, ensuring that resources like ingredients, equipment, or even staffing are allocated to where they’re needed the most.

With an easy-to-use interface, it simplifies the internal order creation process and helps streamline operations, reducing the risk of resource bottlenecks or overspending.

Whether you’re coordinating supplies for an event, assigning tasks, or simply ensuring that your various departments have what they need, Genie’s internal orders provide a systematic and transparent approach to resource management, optimizing efficiency and productivity.

▼ Orders- Internal

Create Internal Order

Print Order Sheets

➡

Select Core Products to Order from Central Venue

Q Search

Supplier

Catering HQ Logistics

Profit Centre

Display Products

All

Product	Qty. To Order	Remarks
Fresh Falafel	0	
Fresh Pasta: Aust Prawn & Balmain Bug Ravioloni	0	
Fresh Pasta: Linguine 5kg box	0	
Fresh pasta: Slow-Cooked Beef Ravioloni	0	

Stock Ordering

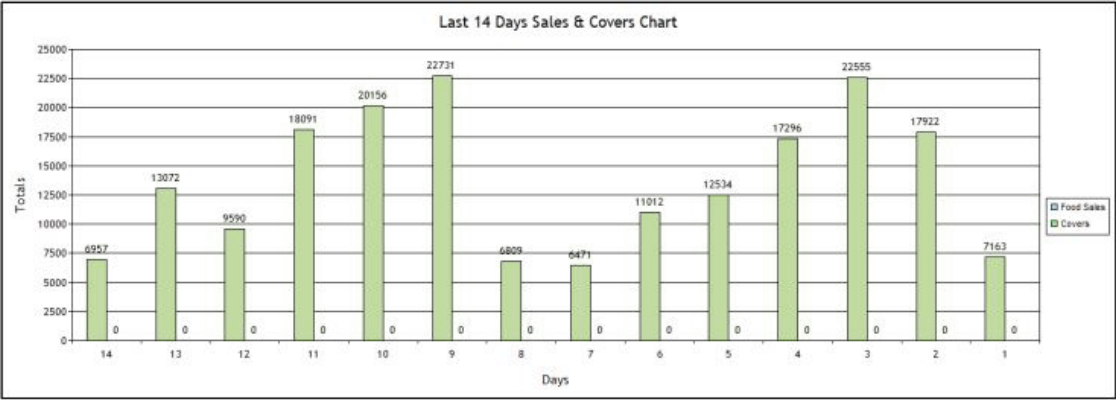
Genie’s stock ordering feature is a game-changer for efficient inventory management. It automates the stock ordering process, ensuring you have the right ingredients and supplies precisely when you need them. By analyzing historical data and sales trends, Genie generates accurate stock orders, reducing the risk of overstocking or shortages.

This not only saves time but also minimizes waste and lowers operational costs. With its user-friendly interface, you can easily adjust orders as needed and track deliveries in real-time. Genie’s stock ordering simplifies one of the most critical aspects of business operations, helping you maintain optimal stock levels and run a more cost-effective and efficient operation.

Daily Sales Sheets

Genie streamlines daily sales sheet management by automating data collection from your point-of-sale system, providing real-time and customizable reports on items sold, prices, and total revenue. This automated approach reduces the need for manual data entry, ensuring accuracy and saving time. The platform’s integration with other modules, such as inventory management and recipe costing, offers a comprehensive view of how daily sales impact your business.

Genie’s user-friendly interface allows easy navigation and comparative analysis of sales data, helping identify trends and make data-driven decisions. With strong data security and mobile accessibility, Genie simplifies daily sales monitoring, empowers strategic decision-making, and ultimately enhances your business’s profitability.



Sales Totals

Cash & Covers	Till 1 Lunch	Till 1 Dinner	Till 2 Lunch	Till 2 Dinner	Pizza Till Lunch	Pizza Till Dinner	Cafe Till Lunch	Cafe Till Dinner	Sports Till Lunch	Sports Till Dinner	Shack Till Lunch	Shack Till Dinner	Functions	Total
Food Total	1673.27	3850.00		136.82			1502.50							7162.59
Covers														

Manager Comments

Comments Lunch

\*\*\* Added 16:34 26/02/2024 - PreetiP \*\*\*

Very quiet lunch,

no issue or complaints.

Cafe: Refund for \$4.20, accidently charged for two coffees instead of one.

Comments Dinner

\*\*\* Added 21:17 26/02/2024 - PreetiP \*\*\*

Slow Dinner,

No issue or complaints.



## Stocktake

Genie's stocktake feature is a powerful tool that simplifies inventory management. It offers an efficient and accurate way to conduct stock counts. With user-friendly interfaces and real-time reporting, it helps you quickly assess your stock levels, identify discrepancies, and maintain precise inventory records. The APP feature integrates seamlessly with the rest of the Genie platform, making it a crucial component in maintaining optimal stock levels and ensuring the smooth operation of your business.

## Genie Budgets

Genie's budgeting feature is an essential tool for precise financial planning. It provides a user-friendly platform to create, manage, and track budgets for various aspects of your business, such as expenses, revenue, and project costs. With real-time data reporting and customizable templates, Genie makes budgeting easy and transparent. By aligning your financial goals with the budgeting feature, you gain a clear overview of your business's financial health, facilitating data-driven decision-making and helping you stay on course with your financial objectives.

## Non-Food Purchasing

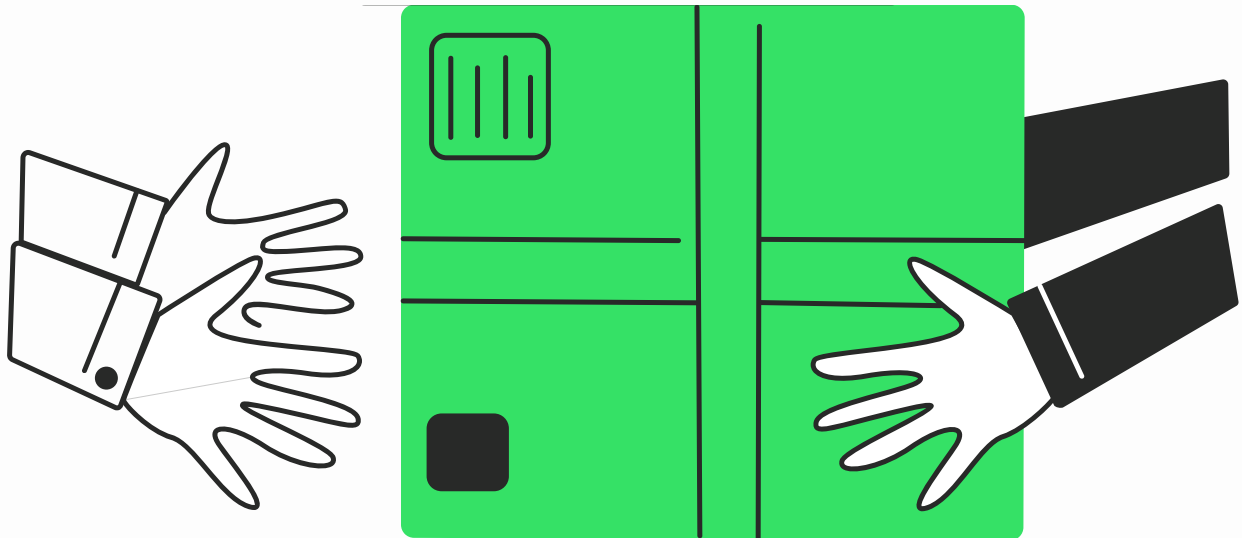
Genie's non-food purchasing feature is a comprehensive tool for managing and streamlining the procurement of essential non-food items for your business. Whether it's cleaning supplies, kitchen equipment, or any other non-food items, Genie ensures a systematic and efficient ordering process. It simplifies order creation, allowing you to specify the items you need, and it seamlessly integrates with supplier invoicing, streamlining accounting.

Real-time data reporting keeps you informed about order status and expenses, while customization options allow you to adapt the system to your specific non-food purchasing needs. Genie's non-food purchasing feature simplifies procurement, reduces manual work, and provides transparency into your non-food expenses, ultimately helping you manage costs and keep your business running smoothly.



## Bulk Transfers

Genie's bulk internal and external transfers feature simplifies the process of moving items within or between your business locations. Whether it's transferring inventory between different departments or sending supplies to external locations, this tool streamlines the logistics. It allows for bulk transfers with a user-friendly interface and real-time tracking, reducing the risk of errors and ensuring that items are accurately accounted for. This feature promotes efficiency, minimizes losses, and provides transparency in the movement of items, helping you maintain optimal inventory levels and enhance the overall management of your business.



## Bulk Waste

Genie's bulk wastes feature offers an efficient solution for managing waste disposal in a streamlined and environmentally responsible way. It simplifies the tracking of bulk waste removal, ensuring compliance with waste management regulations. With this feature, you can record waste collection, track waste weights and volumes, and generate reports

to monitor and optimize waste management processes. This transparency and data-driven approach help reduce waste disposal costs, minimize environmental impact, and ensure your business operates responsibly and in accordance with waste management standards.

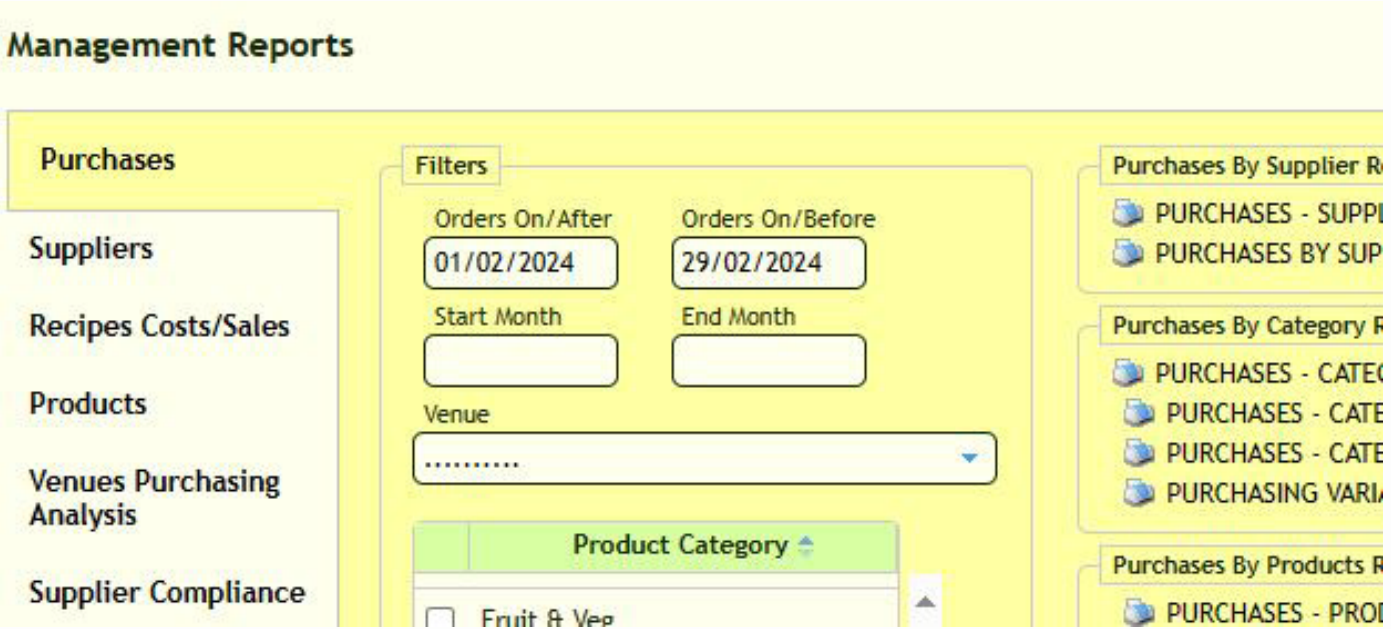


POS Import Sales

Genie’s POS imported sales feature provides a seamless integration with your point-of-sale system, streamlining the tracking of sales data. It automates the import of sales transactions, including item details, prices, and total revenue, reducing manual data entry and the potential for errors. This feature ensures that your financial records are up-to-date and accurate, and it allows for real-time reporting and analysis of sales trends. With Genie’s POS imported sales, you gain a convenient and efficient way to manage your sales data, making it easier to make data-driven decisions and optimize your business operations.

Venue Reports

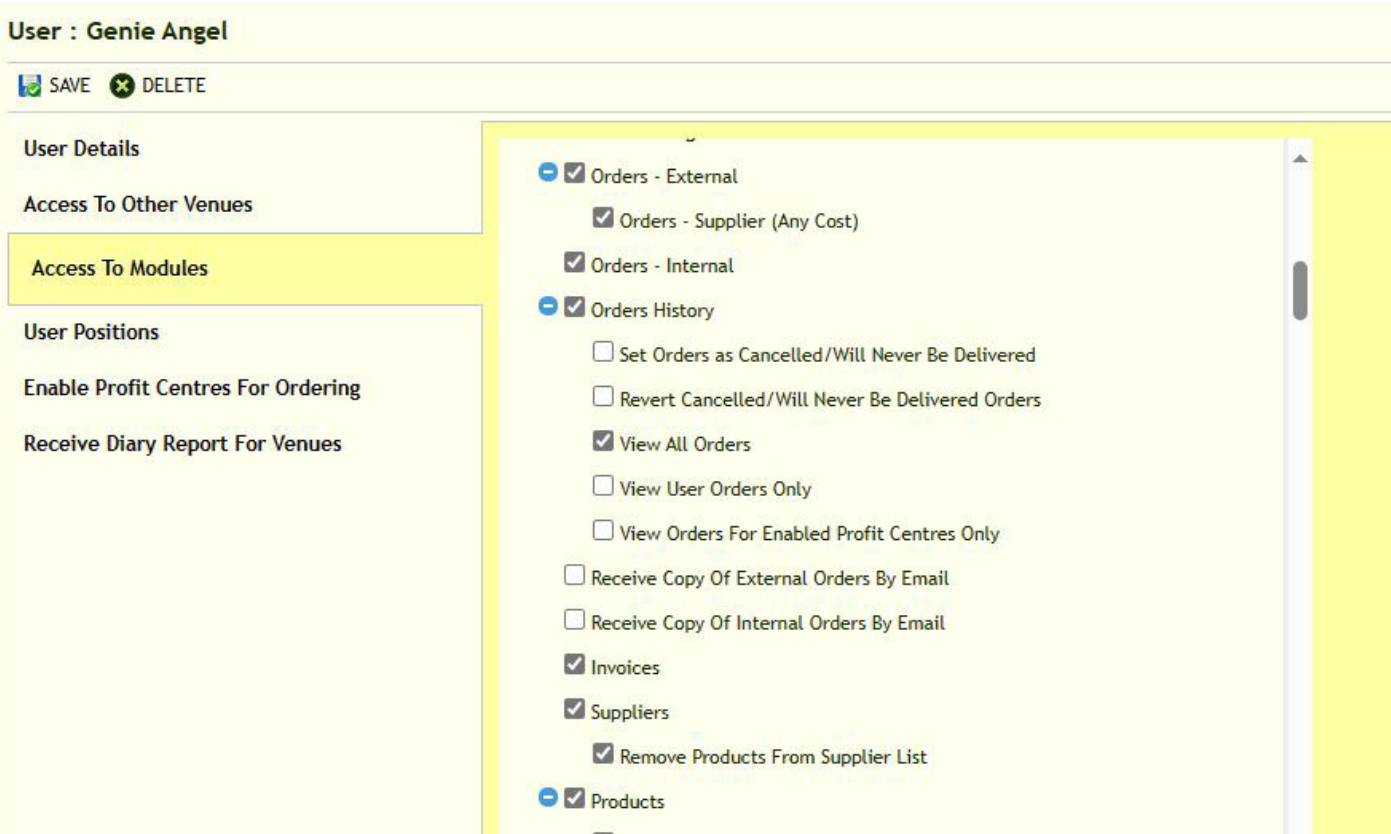
Genie’s venue reports feature is a dynamic tool for businesses operating in multiple locations or venues. It offers a centralized view of performance data from various venues, providing insights into each location’s sales, compliance, and inventory status. This feature simplifies multi-venue management by allowing you to compare and contrast venue-specific data, helping you identify trends and make informed decisions. Genie’s venue reports streamline the oversight of diverse locations, promoting efficiency, data-driven decision-making, and ultimately enhancing the success of your multi-venue business.



Administration

Genie’s administration feature is the command center for your business operations. It provides you with centralized control over user access, permissions, and settings. From here, you can manage user roles and privileges, ensuring that the right people have the right level of access to Genie’s features.

You can also configure and customize the platform to align with your specific business requirements. Genie’s administration feature empowers you to maintain security, optimize user access, and tailor the platform to suit your unique operational needs, making it a pivotal component of efficient business management.



# Custom Built Modules

Recognizing the uniqueness of your business, we design systems to address your specific challenges while handling all other aspects for you.

Genie's custom modules are the gateway to tailoring your business operations precisely to your needs. These modules offer an unparalleled level of flexibility and adaptability, allowing you to create customized solutions that align perfectly with your unique processes. Think of them as tailored solutions, specifically crafted to suit your unique needs.

Whether you're in the hospitality, retail, or any other industry, these modules provide the means to create custom workflows, reports, and functionalities that align seamlessly with your processes. Whether it's a specialized compliance workflow, a unique reporting requirement, or a novel inventory management approach, Genie's custom modules empower you to design and integrate functionalities that are not only efficient but also designed to fit your exact specifications.

The beauty of Genie's custom modules is that they evolve with your business. As your needs change and grow, these modules can be modified and expanded to accommodate new challenges, ensuring that Genie remains a dynamic, ever-responsive platform that continues to drive efficiency, innovation, and success for your business. This flexibility fosters adaptability and innovation, ensuring that Genie remains a dynamic and evolving platform that grows alongside your business, addressing your unique challenges effectively.

# Genie on Mobile

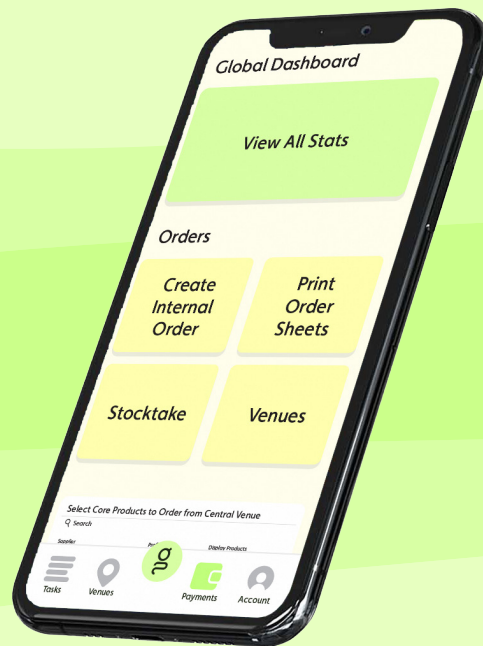
## Phone App

The freedom to manage your business on the go with the Genie Mobile App – your pocket-sized solution for streamlined management anytime, anywhere

Genie's Mobile App is your on-the-go companion for seamless business management.

Whether you're on the floor, in the kitchen, or on the move, this app keeps you connected and in control. From inventory management to sales tracking, compliance checks to task assignments, the Genie Mobile App puts the power of your business right in the palm of your hand.

With intuitive features, real-time updates, and easy accessibility, it's like having your entire operation in your pocket. Stay on top of your business wherever you are with the Genie Mobile App.



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# Want to learn more about how Genie can help you?

Schedule a call with hospitality genie >



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