iCAFE - Back Office Basics

Introduction

The iPOS system is very powerful tool for your business. Behind the POS system is a very comprehensive set of reports and features that will allow you to analysis your business and manage the POS system.
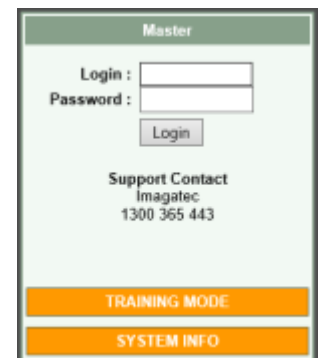
This document will take you through the all of the concepts of the Back Office (or Back of House) part of the system.

LOGINS

A LOGIN is a combination of a login (or username) and password. This is to allow access only to those people who are allowed to have access to your reports. This is a very important security issue. As iPOS can be connected to the Internet, your LOGIN details will be what protects your system.

Your Login is the same as it appears on your button in the POS system. Your Password should be kept secret, changed regularly and have a combination of letters and numbers.

To login to the system

Open Internet Explorer.
iPOS should be set to the Home Page and the Point of Sale options
as well as the Login and Password field should appear on the screen.
Click in the **Login** field.
Enter your **Login**, press **Tab**
Enter your **Password**
Click the **Login** button

If you get it wrong the system will give you 3 attempts.
Do not panic if you get it wrong 3 times. Just close Internet Explorer and try again.
Each time you open Internet Explorer you get 3 attempts.

The login and password are not case sensitive, but if you have used a combination letters and numbers then the **Num Lock** may be turned off which is sending direction arrows instead of numbers. Check that the **Num Lock** light on your keyboard is on.

The system will on a regular basis ask you to change your password. When you do this only your

password will change the Login part will stay the same.

Do not share your login details with others, this is a security risk. If you want others to have access then you can create a separate login and password for them to use. Internet Explorer will offer to remember login and passwords for you. We recommend that you do not use this feature as it will render the security useless in a shared office environment.

As a further security measure iPOS will idle out your Back Office session after a small amount of time, if you do not continue to use it. This is why you may be asked to login again if you leave the system and come back and try a run a report.

Main Menu

Once you have successfully logged in you will always be taken to the Main Menu. Here is a quick description of the Main features of this page.

Across the top of the Page the system will display the name of the page (middle large font), the name of the store (top right corner), the version and date (lower right).

Click on **POS** (top left) will always return you to this page.

The far left column is the System Menu. Here is where you will find links that will change the way the system behaves. That could be adding Staff, Changing the FASTBAR buttons or removing a product you no longer want to sell.

Point of Sale MENU	Point Of Sale	Trend Reports
Stock Control MENU	Restaurant	Trend Report
	Pocket POS	Cumulative Trend Report
Configuration	Fast Bar	
Restaurant		**Help Desk Reports**
FastBar	Manager	Product Listing Retail
Contest Options		Product Listing Tier
Floorplan	Cash Reconciliation	Product Listing Local
	Float Reconciliation	Integrity Journal
Administration	Safe Drops	
Staff		
Products Local	**Reports**	
Products	Till Summary	
Departments	Daily Snapshot	
	Daily Summary	
Tools	Weekly Activity Report	
Build POS Screens	Monthly Activity Report	
Wizards	Weekly Sales Analysis	
	Monthly Sales Analysis	
	Monthly Banking Analysis	
	Void Report	
	Promo Report	
	Promo Analysis	
	Promo Journal	
	Menu Percentages Report	
	Menu Sales Report	
	Table History	
	Product History	
	Unsettled Tables	
	Sales Reports	
	Time Reports	
	Contest Options	

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Reports

iPOS has been designed so that you don't have to print a report at all. The system will store and be able to report on anything today, tomorrow, 6 months or 3 years from now. Everything is date based.

The actual number of and position of the reports may change in the Menu, and that is covered in separate documents. But what won't change is how to ask for a report and what you can do with it.

Refreshing

All reports in the system are calculated when they are asked for. This means that changes in the data (such as more sales) will be reflected each time you ask for the report. A good way to see this behavior is to run a Sales Report like a Daily Summary for today, wait a couple of minutes (make some more sales) and click the Refresh button in Internet Explorer. This will make the system recalculate the report and include any new sales made in between reports.

Hyperlinks

Many reports also have hyperlinks. All of iPOS is a web page, one of the features of web pages are that they can be linked in many ways to each other. (This is why it is called a 'web', since the links do not have to be ordered and they can jump from any page to any page). Hyperlinks are used on Reports in IPOS to indicate that more information is available. This is normally a "drill-down" process (into more detail) but it could also be a "drill across" (into related data).

A Hyperlink can be spotted on a report by the underline. Also when you move your mouse over the hyperlink it will change to a pointing hand. Clicking on the hyperlink will start the calculation of that report. You can return to the current report by clicking on the Back button in Internet Explorer. (When clicking Back, the report is not recalculated, your computer picks up the copy it had before).

Cut & Paste

Reports in iPOS have been designed so that they are compatible for Word and Excel. Reports can be cut & pasted into either of these programs and they will retain their formatting and hyperlinks.

Printing

At some time you will want to print the reports. Internet Explorer does the printing, not iPOS so you need to be aware of how Internet Explorer handles printing.

Firstly Internet Explorer will use your default printer settings. Where possible we have designed Reports to be best printed in Portrait but not every report can fit that way. If a report needs to be printed landscape you will need to change the Print Options in Internet Explorer, iPOS cannot tell Internet Explorer which way to print the report.

To Change a report to landscape

Select File | Page Setup.
Change the Orientation to Landscape
Click OK.

Once you have printed the report, don't forget to change it back to Portrait otherwise the next report will be in landscape as well.

When you do print a report, it may look slightly different to the format on the screen. This is because the screen is different width to the printed page. iPOS has built into the report rules about how to change column widths to fit.

iCafe Standard Reports

Name	Description
Restaurant	Brings up your POS with the tables showing to do sales
Pocket POS	Used if you want to use the POS on a mobile pocket device
Fast Bar	Used for drink sales at the bar
Manager	
Printers	Allows a manager to change where a printer prints to.
Snapshot	Displays a breakdown for the current day or another day if selected of the sales. This can be run during the day to see a quick snapshot of how you are doing. This is a daily report.
Contest Options	This report shows how many items were sold today. You select which products or departments you want to be part of the contest by clicking on Contest Options on the left in back of house. It will then display the below screen. Here you can click on any item and it will bring up the below screen, where you can select either a product or a department or set it to not used. Click the to save your choice.
Table History	Shows the status of all tables for today.
Unsettled Tables	Displays orders that have not been paid yet for today

Name	Description
Cash Reconciliation	Used to reconcile your cash at the end of the day
Float Reconciliation	Used to enter the cash amounts from each cash drawer
Safe Drops	Used to enter amount of cash taken from a cash drawer and put into the safe
Reports	
Till Summary	Displays the sales broken down for each till you have for the day specified. This is a daily report.
Daily Snapshot	Displays a breakdown for the current day or another day if selected of the sales. This can be run during the day to see a quick snapshot of how you are doing. This is a daily report.
Daily Summary	Provides a full End-of-Day Sales Summary, which breaks down the sales and labour. It will also show your productivity per hour.
Weekly Activity Report	Provides a full activity report for the week selected, showing the sales broken down into time periods, the source of the orders, labour summary and productivity per hour.
Monthly Activity Report	Provides a full activity report for the month selected, showing the sales broken down into time periods, the source of the orders, labour summary and productivity per hour.
Weekly Sales Analysis	Displays the sales analysis for the week specified, broken down into days, containing sales of food, beverage, merchandise, other and total, along with promo and net amounts. It also shows the breakdown for breakfast, lunch and dinner.
Monthly Sales Analysis	Displays the sales analysis for the month specified, broken down into days, containing sales of food, beverage, merchandise, other and total, along with promo and net amounts. It also shows the breakdown for breakfast, lunch and dinner.
Monthly Banking Analysis	Displays the sales analysis for the month specified, broken down into days, containing sales of food, beverage, merchandise, other, promo and GST. It also shows the breakdown for payment types of cash, bmv&eft, amex, diners, accounts and other. It also shows the Variance of what should have been paid and what the system has as being paid.
Void Report	Displays all orders with a voided product during the date range specified and shows the product and amount
Promo Report	Shows sales of any Promo items in the food, beverage and merchandise promos departments broken down into breakfast, lunch, dinner and total.
Promo Analysis	Shows sales of any Promo items in the food promo and beverage promo departments with the amount of promo covers, promo $, promo gross, table covers and total $ gross.
Promo Journal	Shows all promos used in the specified date range. It shows the order, date and time of order, table number, seat number, card number if used, staff member, promo name and $ amount.
Menu Percentages Report	Shows quantity and percent's for each department for the date range specified.
Menu Sales Report	Shows sales quantity and $ amount for each department for the date range specified. You can also select to show a specific staff members amounts.

Name	Description
Table History	Shows the status of all tables for the date range specified. It shows the order, table number, till used, when it was opened and by whom, status if it is on hold or away, time table was settled and by whom, and the sales amount or if unpaid. Also gives you a summary too.
Product History	You select a department and then a product in that department and the date range and it shows you the orders that contained that product.
Unsettled Tables	Displays orders that have not been paid yet for the date range you specify
Sales Reports	Provides a full summary of products sold between the date range selected
Time Reports	Displays the Dollar value of goods sold broken down into time intervals
Contest Options	This report shows how many items were sold today or another date range you specify. Refer to Contest Options above under Manager.
Trend Reports	
Trend Report	Determined by the date selected, displays that day of the week and the days of the previous six weeks sales numbers broken into selectable time intervals. Useful to calculate stock and staff required for each day.
Cumulative Trend Report	Same as the Trend Report however tallies numbers through the day.
Help Desk Reports	
Product Listing Retail	This report can show all products or just Active (black) or Inactive (red). This is extremely helpful when requesting a product be put on your system you can see if it may already be in the system or something close to it. This report also shows the abbreviation and price and tax of the product
Product Listing Tier	This report can show all products or a specific department. It also shows the products abbreviation and the tooltip for it along with the price and tax of the product.
Product Listing Local	This report shows all products that are setup Locally by the store and will display their product number, product name and price.
Integrity Journal	Displays any orders that have an error in payment during the date range specified such as the customer paying more than the order amount

To view any of these reports:

1. Choose which one best suits your needs and select it from the list under "Standard Report" from the "Point of Sales" menu once you have logged on;
2. Select the date or date range as requested along with any other filters that you may require (Tip: the date will default to today's date)
3. Click "Calculate Report" to view your results;
4. Should you need to print the report, simply select "Print" from the "File Menu".

Advanced Features

A very powerful feature is that you can run multiple copies of Internet Explorer on the same computer and run multiple reports at the same time. You can use this feature to run and compare reports for different periods.

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