

iPOS - Back Office Basics

Introduction

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

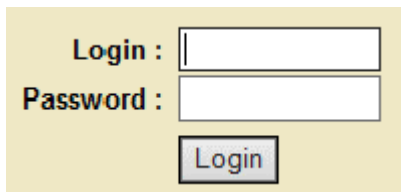
LOGINS

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 protect 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 (if it is not go to the address bar and type in <http://backoffice.url.here/> and press Enter or click Go) and the Point of Sale options as well as the Login and Password field should appear on the screen.

A screenshot of a web-based login form. It has a light yellow background. There are two text input fields. The first is labeled "Login :" and the second is labeled "Password :". Below the password field is a button labeled "Login".

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 allow 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 name 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 time out your Back Office session after a period 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 idle and then try to run a report.

Main Menu

Once you have successfully logged in, the POS Menu will always be displayed. 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 day and date (lower right).

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

The far left column is the Sidebar Menu. The Sidebar Menu has a list of links that will change the way the system behaves. For example: adding Staff or removing a product you no longer want to sell.

POS Labour Stock

Accept

Main Menu

Test

Monday, 14 August 2017

Point of Sale			
<ul style="list-style-type: none"> Point of Sale Labour Stock Control 	<ul style="list-style-type: none"> Point of Sale Make Line 1 (KITCHEN1) Make Line 2 (KITCHEN2) Make Line 3 (KITCHEN3) Make Line 4 (BAR) Dispatch 1 (KITCHEN) Dispatch 2 (BAR) 	<ul style="list-style-type: none"> Sales Daily Summary Sales Reports Time Reports Weekly Activity Report Monthly Activity Report Sales Comparison Report Product Ranking Contest Report Trend Report Cumulative Trend Report Statistics Report Daily KPI Weekly KPI Calendar Sales 	<ul style="list-style-type: none"> Summaries Staff Summary Operator Summary Operator x Product Order Type Summary Order Source Summary Postcode Summary Demographics Summary Demographics Analysis Payment Summary Payment Statement
<ul style="list-style-type: none"> Warehouse Links Loyalty System 	<ul style="list-style-type: none"> Reconciliations Cash Reconciliation Float Reconciliation Cash Drops 	<ul style="list-style-type: none"> Customers Customers Customer Reminders Customer Complaints Customer Listing Customer Journal New Customer Journal 	<ul style="list-style-type: none"> Journals Order Journal Payment Journal Product Journal Loyalty Journal Free Journal Refund Journal Discount Journal Waste Journal Timed Order Journal Un-Paid Journal Value Journal Petty Cash Journal Account Journal No Sale Journal Make Time Journal Void Journal Cancelled Journal Modified Price Journal
<ul style="list-style-type: none"> Administration Configuration Staff Products Local Products Sold Out 	<ul style="list-style-type: none"> Accounts Account Customers Account Summary Account Statement 	<ul style="list-style-type: none"> Delivery Driver Floats Driver Summary Driver Journal Unassigned Journal Delivery Journal Motel Report 	
<ul style="list-style-type: none"> Tools Build POS Screens Calculate Stock 			
<div>LOGOUT</div>			
<div>VALID iPOS v1.60.53 JUNE 2017</div>			

Reports

iPOS has been designed so that you don't need to print a report at all. The system will store and can 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 with future updates. What will not change is how to generate a report and what you can do with it.

Refreshing

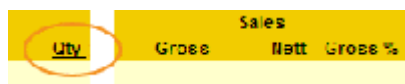
All reports in the system are calculated when they are asked for. This means that changes in the data (such as more sales) will be reflected each time you ask for the report. A good way to see this behavior is to run a Sales Report like a Daily Summary for today, wait a couple of minutes (make some more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



Hyperlinks

Many reports also have hyperlinks. All of iPOS is effectively a web page. One of the features of web pages is 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).



Sales			
Qty	Gross	Nett	Gross %

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

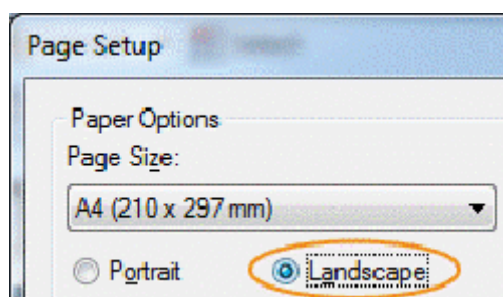
At some time you will want to print the reports. Internet Explorer does the printing, not iPOS so you need to be aware of how Internet Explorer handles printing.

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 a different width to the printed page. iPOS has built-in report rules to change column widths to fit.

iPOS Standard Reports

Monitors

Make Line 1-3 Kitchen These opens the Make Line screens to make the orders. You do not need to use all 3 but the capability is there.

Make Line 4 Bar This opens the Make Line screen at your bar if you so choose to use this option.

Dispatch 1 Kitchen

Dispatch 2 Bar

Reconciliations

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 Drop Used to enter amount of cash taken from a cash drawer and put into the safe

Customers

Customers Shows all the stores customers and you can also search for a customer

Customer Reminders	Shows all the customers reminders
Customer Complaints	Shows all the customers complaints
Dwellings	This is where you can change / de-activate or activate Dwelling types.
Customer Listing	Shows all the customers with the parameters you enter like their surname or postcode
Customer Journal	Shows all the customers' orders for the date range you specify
New Customer Journal	Shows all the new customers and their order for the date range you specify
Motel Report	Shows all orders with order type of Motel in the date range you specify
Accounts	
Account Customers	Shows all Account Customers and allows you to edit them by clicking on their name
Account Summary	Shows all orders with the payment made to account during the date range you specify
Account Statement	You must select the Account you want to see and the date range and then it will give you a tax invoice you could send the account holder
Sales	
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.
Sales Reports	Provides a full summary of products sold within the date range selected



Time Reports	Displays the Quantity and Dollar value of goods sold, broken down into time intervals
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, <u>labour</u> 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, <u>labour</u> summary and productivity per hour.
Sales Comparison Report	Breaks down total sales, transaction count and average sales by week for two selectable years. Allows you to compare for example this period to the same period last year or the year before
Product Ranking	Displays the most popular product in order of quantity sold or dollar amount
Contest Report	<p>This report shows how many items were sold and the total %. You select which products or departments you want to be part of the contest via clicking on Administration Configuration on the left in back of house and then clicking on Contest Configuration</p>
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.
Statistics Report	Comprehensive report displaying sales, # of pizzas, <u>cust</u> count, ATV, how many orders and what % were pickup and pickup bump time, and the same for deliveries
Daily KPI	Complete list of every day in the selected time frame with corresponding Net Sales and Average Sales

To view any of these reports:

1. Choose which one best suits your needs and select it from the lists from the “Point of Sale” 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.

From:
<https://wiki.imagatec.com.au/> - Imagatec Wiki

Permanent link:
https://wiki.imagatec.com.au/doku.php?id=customer_portal:manuals:ipos:back_office_basics

Last update: **2025/07/14 14:48**

