

iWAREHOUSE - 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 Warehouse part of the system.

What is the iPOS Warehouse?

The iPOS Warehouse is separate but related system to the in-store version of iPOS. iPOS was build from the ground up to be used in multiple locations like a franchise or corporate chain of stores. The Warehouse is the part of the system where all the data from all the stores are combined into a single database for consolidated reporting.

The Warehouse contains many other features besides consolidated reporting. We have added special features that turn the Warehouse into the beginnings of your corporate Intranet. (An Intranet is the term given to a web site which is not available to the public, only for people in your company to see).

The Forums are a very important additional feature to the warehouse. The forums are where stores can post ideas and get replies from other stores as well was from corporate staff. Normally moderated you can separate topics into related groups. In a large country where distance stops people of mingling and sharing ideas this is an ideal method of encouraging communications.

The Document Store is a great feature for the distribution of important documents. Copies of Manuals, Master copies of forms and back copies for newsletters are ideal content for the document store. Using the document store frees up email systems as some documents are just too big to email.

Where is the Warehouse?

The warehouse is a special web site hosted on servers at Imagatec. It is available to you from any computer in the world that is connected to the Internet. To connect to the warehouse you will need the address and a login and password.

Login

A LOGIN is a combination of a login (or username) and password. This is to allow access only to those people who are allows to have access to your reports. This is a very important security issue. As the

warehouse is connected to the Internet, your LOGIN details protects the system.

To get a login and password - See your System Administrator

To Login to the System

Open Internet Explorer.

In the address bar type <http://WAREHOUSE.URL.HERE>

Press Enter or Click Go.

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 display 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 day and date (lower right).

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

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 separately. 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 for today, wait a couple of minutes 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.

To cut and paste a report, select the report by pressing Ctrl+A or Edit | Select All from the Internet Explorer Menu. Open the Word or Excel Document then Ctrl+V or Edit | Paste.

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.

Multiple Copies

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.

Every time you open a new copy of Internet Explorer you will need to login again.

Just be careful when using this feature if you request multiple large reports. The Server will try and process both requests at once which will affect speed.

Emailing Reports

Internet Explorer also allows you to Email a report to someone else to share the information with them.

Run the report you want to email then in Internet Explorer select the Email icon and select Send Page. This will open outlook and create a new email with the report imbedded in it. Add the people to send it to and add any notes then click send. It's that easy!

Groups

A powerful feature of the warehouse is to be able to group like stores on a single report. Use the Group Builder to select Groups for a report into the Groups field. Groups are separated by commas “,” and are processed as a logical “OR” operator.

Some Users are set to use a specific group all the time, as a security restriction, Multi Store Operators (MSO) and Regional Managers (RM) are restricted to see only the stores that apply to them. In this way the warehouse is an extra service provided to MSOs using the existing technology.

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