

# CLOUD - Back Office Basics and Report Guide

## Introduction

The POS 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

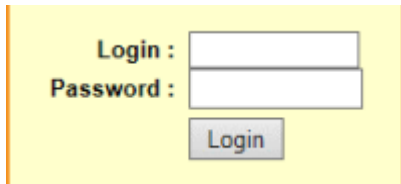
A LOGIN is a combination of a login (or username) and password. This is to allow access only to those people who are allowed to have access to your reports. This is a very important security issue. As iPOS can be connected to the Internet, your LOGIN details will protect your system.

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 your browser (Chrome, Edge)

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.

A screenshot of a login form with a yellow background. It contains two text input fields: the top one is labeled 'Login :' and the bottom one 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. Just make sure you closed all Internet Explorer windows.

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 version and date (lower right).

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

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

Acceptance

Manager Monday, 14 August 2017

**Main Menu**

**Point of Sale**

- Point of Sale
- Labour
- Stock Control
- Administration
  - Configuration
  - Staff
  - Products Local
- Tools
  - Build POS Screens
  - Calculate Stock
  - Refresh Training Mode
  - System Info
  - Support Info

**Point of Sale**

- Point of Sale
- Monitors
  - Make Line Monitor 1
  - Customer Monitor
  - Drivers Monitor
  - Drivers Login
- Reconciliations
  - Cash Reconciliation
  - Float Reconciliation
  - Safe Drops
- Customers
  - Customers
  - Customer Reminders
  - Customer Complaints
  - Customer Listing
  - Customer Journal
  - New Customer Journal

**Sales**

- Daily Summary
- Sales Reports
- Time Reports
- Sales Comparison Report
- Product Ranking
- Weekly Activity Report
- Monthly Activity Report
- Contest Report
- Trend Report
- Cumulative Trend Report
- Statistics Report
- Weekly KPI
- Daily KPI

**Dough Production**

- Pizza Analysis

**Driver Reports**

- Driver Floats
- Driver Summary
- Driver Journal
- Unassigned Journal

**Summaries**

- Operator Summary
- Operator x Product
- Order Type Summary
- Order Source Summary
- Suburb Summary
- Payment Summary
- Workstation Summary

**Journals**

- Order Journal
- Payment Journal
- Product Journal
- Timed Order Journal
- Delivery Journal
- Un-Paid Journal
- Value Journal
- Petty Cash Journal
- Account Journal
- Canceled Journal
- Void Journal
- Product Listing (Retail)
- Product Listing Tier

LOGOUT

iPIZZA v1.50.40 JUNE 2014

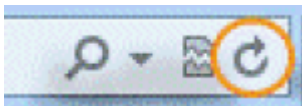
## Reports

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).

A screenshot of a report table with a yellow background. The first cell 'Qty' is underlined and circled in orange, indicating it is a hyperlink. The table has columns for Sales, Gross, Nett, and Gross %.

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.

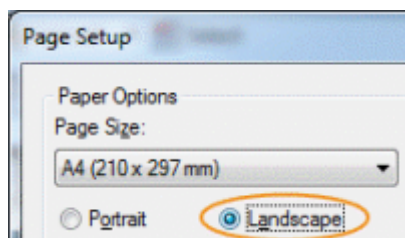
## Printing

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

Name	Description
<b>Monitors</b>	
Make Line Monitor 1	This opens the Make Line screen to make the pizzas
Customer Monitor	This opens the Customer screen to show order status
Drivers Monitor	This opens the Drivers screen where it will show the drivers status and they can clock on or off.
Drivers Login	This opens the screen for the drivers to login
<b>Reconciliations</b>	
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
<b>Customers</b>	
Customers	Shows all the stores customers and you can also search for a customer
Customers Reminders	Shows all the customers reminders
Customers Complaints	Shows all the customers complaints
Customer Listing	Shows all the customers with the parameters you enter like their surname or postcode

## Point of Sale Back of House

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.

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