

# InfoPOS

## User Manual

INFOPOS-V.1

www.InfoSoftTechnologies.com

.Net "Quick Service" & "Retail Industry" POS Software • www.InfoSoftTechnologies.com



*A software application  
from our extensive  
suite of POS products,  
created by*





**Product Overview**

As the "Industry's MOST versatile point of sale software", InfoPOS™ accommodates all of your store's POS needs. It is a web-based application, that is installed directly on your terminals. It sends sales data to InfoSoft LP™, our back office collection & reporting application. The pricing and keyboard options are managed at the corporate office, and within minutes can update all terminals. InfoPOS™ tracks your customers purchases & visits for loyalty benefits.

Visit [www.InfoSoftTechnologies.com](http://www.InfoSoftTechnologies.com)  
Find Out More About InfoPOS™ and  
Our Suite of Companion Software Products.

**INCLUDES**

-  Our Back Office, Web-Based Collection & Reporting Software
-  Our Pricing & Keyboard Control Software
-  Our Customer Loyalty Management and Tracking Software

**Features & Benefits**

- Keep Your Existing Hardware & Integrate InfoPOS™ with Your New Technology
- Sends Data Straight to Corporate Office, Back Office PC Not Required
- Easy Installation, Download Directly from Our Website
- Web-Based Reporting & Data Collection from Anywhere
- Track Your Customers
- Data is Pushed to the Corporate Office as Often as Every 10 Minutes
- Clock-In & Clock-Out to Manage Labor Cost
- Multi-Level Discount and Coupon Features
- Forced Condiment Modifiers & Item Groupings (*Quick Service Features*)
- Runs Seamlessly on **ANY** Touch Screen Terminal
- Developed Using **.Net Technology**
- Integrate Your Data with Your Other Stores



**FAQ'S**

**Q:** I am concerned that when I upgrade to your software, it will create an initial downtime in my stores & slow the service to our customers while employees learn to use the new system.

**A:** InfoPOS is a completely downloadable software that can be configured via the web. Once a license is obtained, you can set up the system on any PC and when you are ready to use, just turn it on. No down time ever!

**Q:** What if I don't like the colors or interface of the software?

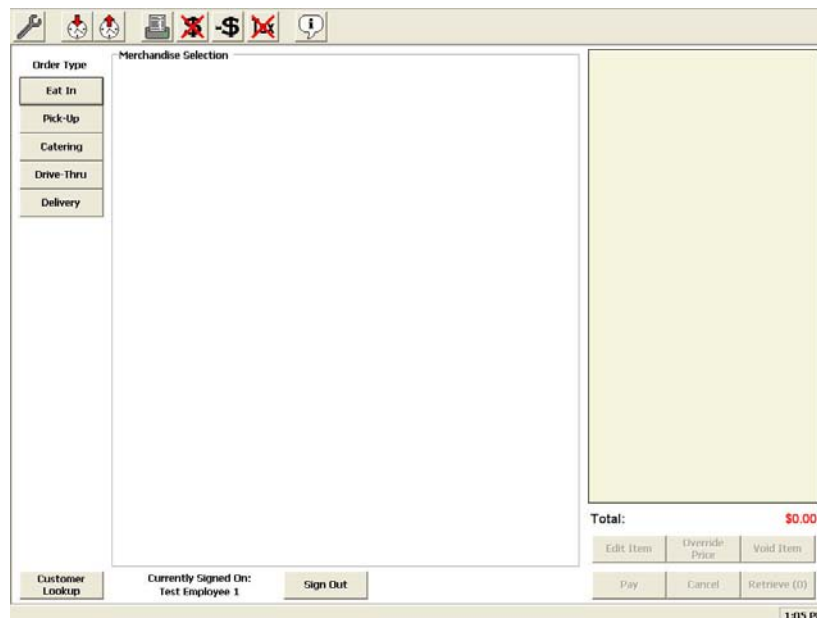
**A:** InfoSoft Technologies has designed InfoPOS to be 'COMPLETELY' programmable via the web...all colors, hierarchy's and options can be designed to your preferred layout.

# Starting InfoPOS™ for the First Time

1. Double Click the InfoPOS™ logo on your desktop.
2. You should be presented with a box that says “InfoPOS is running in Demo Mode”, Click **“OK”**.



3. You will receive a list of employees for the demo store. Select the top one and click OK. You will be presented with a keypad for entering the password. The password should be 1001, Click **“OK”**.
4. Now you will see the main screen of InfoPOS™. It should look like the screen below.



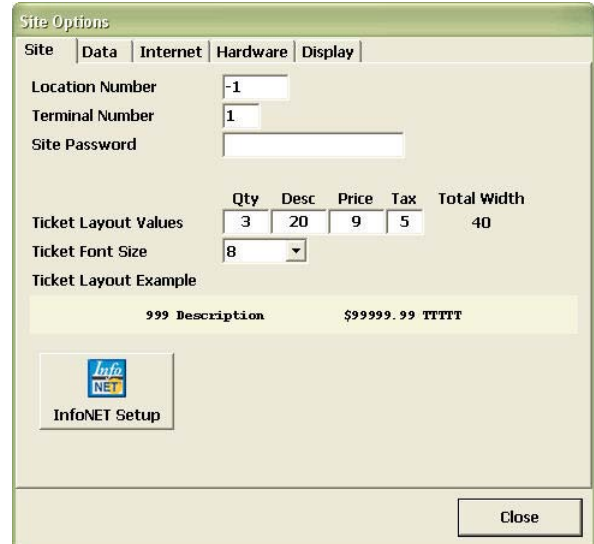
# Setting Up Your Store

1. Click on the **wrench icon** in the upper left corner of the screen. You will be presented with a box with a list of options.



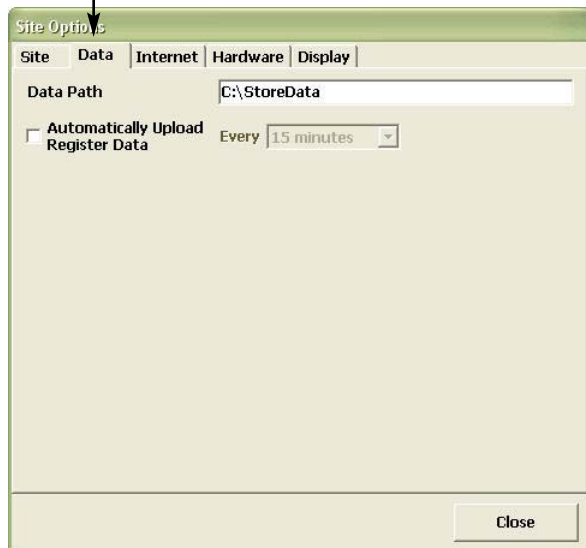
2. Select the button that says “**SITE OPTIONS**”.

3. On the screen that pops up, enter the information in the boxes. Type in your **Store Location Number**, **Terminal Number**, and **Site Password**, which can be obtained from your corporate headquarters.

A screenshot of the 'Site Options' dialog box. It has tabs for Site, Data, Internet, Hardware, and Display. The Site tab is active. Fields include Location Number (-1), Terminal Number (1), and Site Password. A table shows Ticket Layout Values: Qty (3), Desc (20), Price (9), Tax (5), Total Width (40). Ticket Font Size is 8. A Ticket Layout Example shows '999 Description' with price '\$99999.99' and tax 'TTTTT'. An 'InfoNET Setup' button is at the bottom left, and a 'Close' button is at the bottom right.

Qty	Desc	Price	Tax	Total Width
3	20	9	5	40

4. Next Click on the “**Data**” tab.

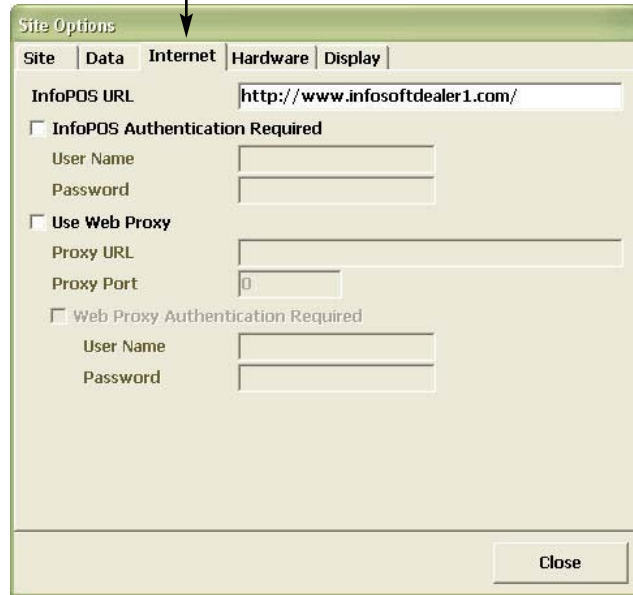
A screenshot of the 'Site Options' dialog box with the 'Data' tab selected. It shows 'Data Path' as 'C:\StoreData'. There is a checkbox for 'Automatically Upload Register Data' which is unchecked. A dropdown menu shows 'Every 15 minutes'. A 'Close' button is at the bottom right.

Automatically Upload Register Data  Every 15 minutes

5. Make sure the box that says “Automatically Upload Register Data” has a check mark in it. *This will make sure that the register uploads your data at the time interval specified. For a high speed internet connection every 15 minutes is recommended. For dial up connections, you can use whatever you would like, but every 12 to 24 hours is recommended to avoid high phone bill costs.*

# Setting Up Your Store- Cont'd

6. Next click on the “Internet” tab

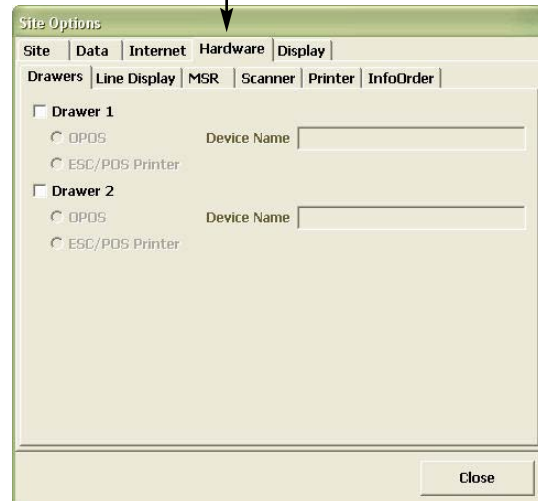


The screenshot shows the 'Site Options' dialog box with the 'Internet' tab selected. The 'InfoPOS URL' field contains 'http://www.infosoftdealer1.com/'. There are checkboxes for 'InfoPOS Authentication Required', 'Use Web Proxy', and 'Web Proxy Authentication Required'. Each checkbox has associated 'User Name' and 'Password' input fields. A 'Close' button is at the bottom right.

7. Fill in the internet address that InfoPOS™ will look to for information. *This is the same website you log onto for you sales data.*

8. Now click on the “Hardware” tab.

9. On the “Drawer” tab, select what will be kicking the drawer open. If your drawer is plugged into the PC, then select “OPOS” and type the device name in the box, this will be the name of the drawer. If your drawer is plugged into the back of the printer; then you will select the “ESC/POS” Printer option. Repeat for drawer 2 if you have a second drawer.



The screenshot shows the 'Site Options' dialog box with the 'Hardware' tab selected. The 'Drawers' sub-tab is active. There are two sections for 'Drawer 1' and 'Drawer 2'. Each section has radio buttons for 'OPOS' and 'ESC/POS Printer', and a 'Device Name' input field. A 'Close' button is at the bottom right.

10. Next select the “Line Display” tab if you have a customer display hooked up to your PC.

11. Type the name of your customer display in the field box. Check your displays instruction manual for the name.

12. Next click the “MSR” tab. In this box you select whether you have an OPOS Magstripe reader or one that is connected to your USB port.

## Setting Up Your Store- Cont'd

- 13.** If you are using an OPOS MSR select “**OPOS**” and type the name of the device in the field box. *For more information, see you MSR's manual.* For a USB connected MSR select the “**Keyboard Wedge**” option. If you do not use a MSR, when you choose to take a credit card, you will be asked to enter the card manually instead of being asked to swipe the card.
- 14.** Next click on the “**Scanner**” tab. Use this area to set up your scanning device if you choose to use one. Enter the specifics of your scanner in the field boxes. If you need more information, refer to your scanner’s manual.
- 15.** Click on the “**Printer**” tab to begin setting up your printer. Click the check box if you are going to be using a slip printer. Now select the box with the three dots. Here you will have a list of printers that are currently set up. If you do not see the printer you would like to use, you may not have the necessary drivers installed on the terminal. For more information, refer to your printer’s manual.
- 16.** Now click on the “**Display**” tab at the top of the box. Here you can adjust the size of the buttons on your screen. Just click and hold on the buttons and drag them to the desired size. The button at the bottom of the box will show an example of how the button size will look.
- 17.** Once you have finished you can select the “**Close**” button. All your settings will be saved. Now select the **wrench icon** at the top of the screen. In the box that comes up, select the reload from internet button. InfoPOS™ will now sync itself up with the website you have chosen. When finished loading, you should see your menu on the screen. You can now run InfoPOS.

# Ringing A Sale

1. Start by selecting an Order Type, “**Eat In**” “**Carry Out**”, “**Pick Up**”, etc.  
If you do not have the order type option skip to step 2.

2. You should see your menu choices on the screen. Depending on how your menu is set up, you will see a list of categories or your PLU's on the screen. Select the menu item or category you would like. You will now either be presented with another column of choices, a modifiers screen, or the item will appear on the right side of the screen in the ticket display.

## Using the Modifiers Screen *(If you have this option set up)*

Depending on the Order type, you may be presented with a modifiers screen.  
See example below.

Select Options

WHITE	American	STANDARD DRESS	.	ALL	Select Items Below for Extr
WHEAT	Cheddar	Tomato	No Tomato	Mustard	Xtra Mustard
NO BREAD	Mozzarella	Lettuce	No Lettuce	Mayonnaise	Xtra Mayo
	Provolone	Onion	No Onion	Pickles	Xtra Pickles
	Pepper Jack	Oregano	No Oregano	Black Olives	Xtra Blk Olives
	Swiss	Salt	No Salt	Jalapenos	Xtra Jalapenos
	No Cheese	Pepper	No Pepper	Spicy Mustard	Xtra Spicy Mustard
		Oil	No Oil	Banana Peppers	Xtra Banana Peppers
		Vinegar	No Vinegar	Regional Pepper	Xtra Regional Pepper
				Spicy Ranch	Xtra Spicy Ranch
				Fat Free Mayo	Xtra Fat Free Mayo

Quantity 1 2 3 4 5 6 7 8 9 10 1

On this screen, you can select what additional items will be added to your selection, (ie. breads, cheeses, toppings, etc.). Select the items you would like to add, click again to deselect an item.

Depending on how your menu is set up, you may select as many items in a column as you wish or you may be only able to select one. When finished, choose “**Add to Ticket**”, and the items you set up will appear under your selected item.

3. You may continue to ring items in.

4. When finished select the “**PAY**” button at the bottom right of the screen.  
You will now be presented with a list of payment options.

# Finishing a Transaction

1. Select the payment type.
2. If you selected cash or check, you will be presented with the following screen.
3. You can type in the amount tendered, use one of the quick buttons, or select okay if you were given exact change. There is also a NH\$ button. When selected this will ring in the next highest dollar of the total. **Example:** If the total was 3.26 hit NH\$ and it will automatically ring in 4.00.
4. After entering the amount received, **click “OK”**. You will now be presented with a change screen like the one below.

7	8	9	DEL
4	5	6	CLR
1	2	3	.
0	00	NH\$	
Total		Tendered	
6.04		6.04	
\$5	\$10	\$20	\$50
US Currency			
OK		Cancel	

**Total: \$9.92**  
**Tendered: \$9.92**  
**Change: \$0.00**

5. Here you will see the transaction total, the amount tendered, or received, and the change.
6. The change screen will stay on the screen until you tap or click the screen. Once you tap the screen, the change box will disappear and you will be ready for the next transaction.

# Holding a Ticket

**With InfoPOS™, you can hold a ticket that you have rung up but have not finished out by paying yet to finish at a later time, here's how:**

1. When you have finished ringing in a sale, before you hit the **“PAY”** button, press the **“HOLD”** button in the bottom right corner of the screen.
2. This will place the ticket on hold, and print out a hold receipt if you have a printer set up.
3. After holding, you may continue to ring up transactions.
4. When you need to recall a held ticket, hit the **“RETRIEVE”** button where the **“HOLD”** button used to be. It should say “Retrieve” and then a number in parentheses beside it, *example: Retrieve (6)*.
5. You should now have a list of all transactions on hold. Choose the one you would like to recall and **Click “OK”**
6. This will bring your transaction up onto the screen. You may add more items to it, finish the transaction out, press **“HOLD”** again to store the transaction again, or hit the cancel button to clear the transaction. **WARNING:** Hitting the Cancel button will clear the transaction permanently!

## Voiding A Transaction

1. When wanting to refund a transaction, select the “dollar sign” with a red **X** through it. This will turn on refund mode. This option may be manager protected depending on your web settings.
2. Ring up the items as you would normally. In the ticket screen on the right, you should see a “minus sign” in front of the quantity and parentheses around the dollar amount and total at the bottom.
3. When finished click “**PAY**” and refund using the payment type you wish. Depending on your web settings you may not be able to refund certain pay types. Check with your corporate office for more information.
4. Finish the transaction as you would normally.

## Tax Exempt

To exclude tax on a sale, you can use the “**Tax Exempt**” button. The tax exempt button is the **TAX** with an **X** through it. Press it and the button will remain depressed. Ring sales as normal. You should see the words “Tax Exempt” on the ticket display. To turn tax back on, press “**Tax Exempt**” again or finish the sale. Tax will turn on again at the start of the next transaction.

## Clocking In & Out

1. To use the “**Clock in/Clock out**” feature, make sure your employees are set up correctly on your website.
2. When you choose “Clock in/out” you will be presented with a list of your current employees.
3. Select the employee you would like to clock in/out.
4. Click “**OK**”
5. Now you may be presented with a password screen, *depending on your web settings*.
6. Once you have finished you should receive a printer receipt if you have one set up that says, “Clock in/out”.

## Printing a Receipt

**You may choose to only print a receipt when you would like to. This option can be turned off on the website. If you choose to not print a receipt every transaction, but want to or would like to print more than one receipt, do the following:**

1. Ring a transaction as you would normally.
2. When you get to the change screen, click the change box to make it disappear.
3. Now in the ticket screen, the background should be blue. *This indicates a completed transaction.*
4. If you would like a receipt for that transaction, click the “**Printer**” icon at the top of the screen. This will print the transaction that is still on the screen. You may print as many copies as you like, until you start another transaction.

## No Sale

**If you would like to kick the drawer open without ringing a sale, you may click the “NO SALE” button at the top of the screen. This is the button that is a dollar sign with a red X through it. Depending on your web settings, you may need a manager’s approval to complete this.**

## Driver Assignments

**You can assign a ticket to a driver that has a bank set up. (See Administer Banks section)**  
**This way you can track how much a driver owes to balance his or her bank at the end of the night.**

1. Ring up a sale as you normally would.
2. Now click the “**Driver Assignment**” button at the top of the screen. This will bring up a screen with all of your employees with banks set up.
3. Select the employee you would like to assign the ticket to.
4. Now you may finish out the transaction by paying or put the ticket on hold.

# Administer Banks

Here you can set up banks for use in assigning tickets to drivers for delivery.  
To set up a bank do the following:

1. Click the **wrench icon** in the upper right hand corner of the screen.
2. In the new screen, click the “**Administer Banks**” button.
3. Here you will have a list of current created banks in addition to the Default Bank. The Default Bank will always be in this box.
4. To create a new bank, select “**Create Bank**”.
5. In the “Assigned Employee” box, click the drop down tab and you will see a list of current employees.
6. Select the employee you would like to create a bank for.
7. Next, type in their starting balance.
8. Click “**Okay**”.
9. Repeat for more employees.



# Balancing Banks

When finished for the day, you can balance your banks.  
To do this, follow the instructions below:

1. From the “**Administer Banks**” menu, select the employee(s) you would like to balance.
2. Select “**Balance Bank**”
3. You will now have categories of payment types.
4. Select a payment type, and if there is a balance, you will see a list of tickets assigned to that driver with the payment type.
5. Select one of the tickets and select “**View Ticket**”.
6. You will now see the transaction on your screen for verifying the ticket. Select “**Close**” when finished.
7. As you receive money, you can click the checkbox next to the transaction. This means you have received the payment.
8. To balance out all transactions at once by pay type, you can check the box next to the payment type. If you choose to balance out the bank by just entering a deposit, you can enter a deposit amount in the “**Deposit**” field at the bottom. Any outstanding balance will appear at the bottom next to “**Outstanding Balance**”.
9. When finished you can print a record by selecting “**Print Balance Receipt**” and you will receive a receipt saying if the bank was balanced or not.

## Resetting & Deleting Banks

1. In the “Administer Banks” screen, select the employee you would like to reset.
2. Select “**Reset Bank**”. This will reset the bank and bring up a screen for entering a new bank balance
3. Enter your new starting balance and hit “**OK**”

**To delete a bank, select the bank you wish to delete and select “Delete Bank”.**

**Note:** You can not delete the Default Bank but you can reset the balance.

## Reports

**You have several local reports at your fingertips with InfoPOS™.**

To run reports, click the **wrench icon** and in the new screen, click “**Reports**”. Select the report you wish to run, enter the date range you wish to see, and select “**Preview**” or “**Print**”.

**SALES REPORT** - This will be used for counting down your drawer and seeing your daily sales. Here you will see: Cash in drawer, Net 1 and Net 2 sales, discounts, total charges, Total tax, non-taxed sales etc.

**DEPARTMENT REPORT** - This will tell you your total sales by department.

**PLU REPORT** - This will report your sales by individual item.

**HOURLY REPORT** - This will tell you your sales by hour of the day. The time is in a 24 hour format.

**TIME-CLOCK REPORT** - Here will be a time clock report for employees who clocked in and out during the selected date range.

# Uploading Your Data

**InfoPOS™ will automatically push your data to your selected website if turned on.**  
(See *Setting Up Store*) **If you would like to manually push your data for up to the minute reports on the web, do the following:**

- 1.** Select the **wrench icon**.
- 2.** Click the “**Upload Journal File**” button.
- 3.** You should receive a box that says “Journal Files Uploaded”. This indicates a successful download. If you receive an error message indicating a failed upload, check your internet connection and try again. If you continue to receive the message, and you have an internet connection, contact your support team.

## Support Information

**There may be times when your support team will need to access your PC remotely through the internet. If they need to have your IP Address you can obtain this information easily by doing the following:**

- 1.** Click on the **wrench icon** at the top of the screen.
- 2.** Select the “**Support Information**” button.  
Here you will have the information needed for support.

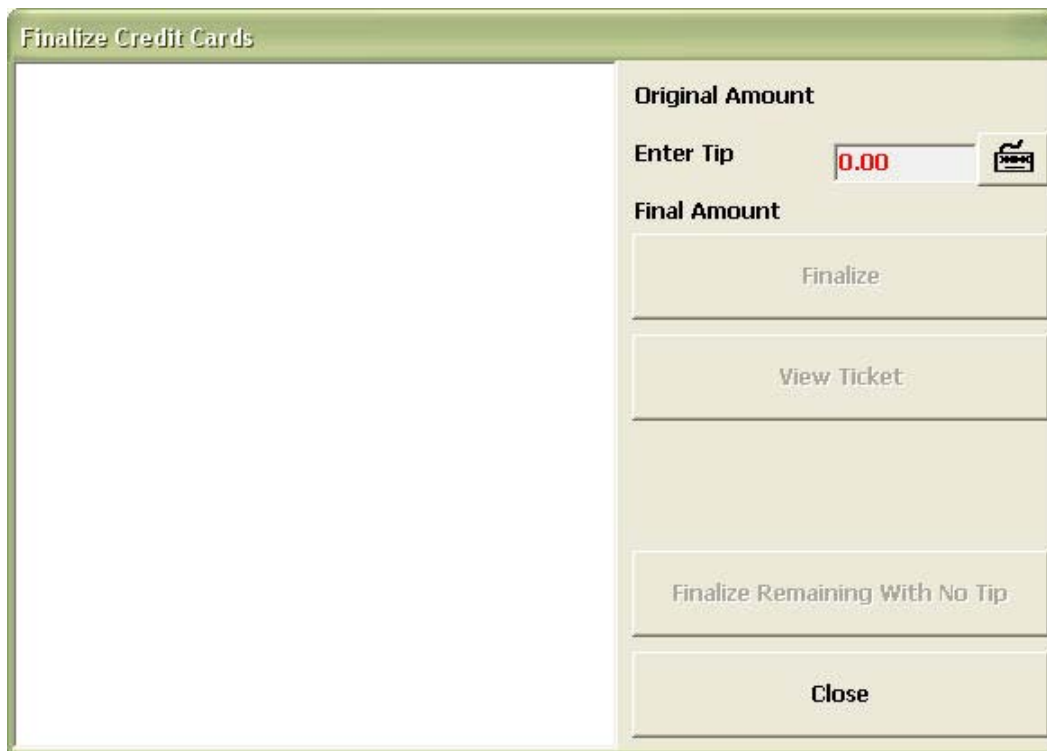
# Finalizing Credit Cards

If this option is turned on in the website, you will have the option to enter your tip amounts before batching your credit cards.

1. Select the **wrench icon** at the top of the screen.
2. From the new screen, click "**Finalize Credit Cards**".
3. Here you will have a list of your credit card sales for the day.
4. Select a transaction you would like to add a tip to.
5. In the tip box type in the tip amount and click "**Finalize**".
6. Repeat for all transactions with tips.
7. To finalize the remaining transactions without tips, click "**Finalize Remaining With No Tip**".
8. This will finalize all remaining transactions.

**WARNING:** Be sure to finish all tipped transactions before clicking "Finalize Remaining With No Tip".

After finalizing in InfoPOS™, you will still need to batch out your credit cards through your credit card software. You may need to refer to the information that came with your credit card software.



The screenshot shows a software window titled "Finalize Credit Cards". The window is divided into two main sections. The left section is a large, empty white area. The right section contains a form with the following elements: "Original Amount" (a label), "Enter Tip" (a text input field containing "0.00" and a small icon to its right), "Final Amount" (a label), and four buttons stacked vertically: "Finalize", "View Ticket", "Finalize Remaining With No Tip", and "Close".

## Batching Credit Cards

**Credit cards can be batched through InfoPOS™ without needing to go through your current credit card software. To batch credit cards, simply do the following:**

1. Make sure you have all of the credit card transactions finalized if you are using the tips option (See “Finalize Credit Cards”).
2. Select the wrench icon.
3. Click the Batch Credit Cards Button.
4. You should receive a message box asking to confirm the batch.
5. Click “OK”.
6. You should now receive a batch report receipt from your credit card software if set up to do so.

## Setting Up Autobatch

**InfoPOS™ can be set up to automatically batch your credit cards for you at a specified time. To set this feature up, follow these instructions:**

1. Make sure you have all of your transactions with tips finalized before the autobatch is set to go off (see “Finalize Credit Cards”)
2. Click the **wrench icon** on the main screen
3. Click on the “**Site Options**” button. If you are then prompted for a password, this password can be obtained from your corporate headquarters.
4. At the bottom of the “Site Options” box, check the box next to “Schedule Credit Card Batch For”
5. You should now be able to select a time for your autobatch. You may set this to any time of day.
6. After the autobatch has run, “**Autobatching Credit Cards...**” should appear in the lower left corner of the screen.
7. After batching, you should receive a batch report receipt if your software is set up to do so.

# Working Without an Internet Connection

There may be times when you will not have internet access. When InfoPOS™ boots up, it will tell you if it cannot find Internet access. You will receive a box on your screen that tells you “InfoPOS™ Cannot Access the Internet”. Using cached information, InfoPOS™ will run on the last information it received before the internet stopped working. You can continue to run InfoPOS™ with no problem until your internet connection is established again.

**NOTE:** Since InfoPOS™ grabs information from the website each time it is started, any price changes, employee additions or changes, or any modifications will not show up in InfoPOS™ until an internet connection is reestablished. When your connection is restored, click the “**Reload From Internet**” button under tools menu (*wrench icon*). This will then grab all changes from the website.

You also will not have your sales data on the web until internet connection is restored. Once this occurs, InfoPOS™ will push all data to the website automatically.

**NOTE:** You might not be able to run credit cards if you are using a high speed connection to authorize if internet connection is lost.

