# InfoPOS

WEB MANUAL INFOPOS WV.1

with InfoPAK™ Setup

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


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

INFOSoft Technologies

"Tomorrow's Information TODAY"

INFOSoft Technologies

"Tomorrow's Information TODAY"

POS Touch Screen SOLUTIONS

# Software Product: *InfoPOS*™

**.Net POS Software, for ANY Terminal, Specifically Designed for the "Quick Service" & "Retail Industry"**

*InfoPOS*™

.Net "Point of Sale" Software

## 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**
Find Out More About InfoPOS™ and Our Suite of Companion Software Products.

**INCLUDES**

- *InfoSoft*LP™ software — Our Back Office, Web-Based Collection & Reporting Software
- *Info*PAK™ — Our Pricing & Keyboard Control Software
- *Info*REWARDS™ — 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.*

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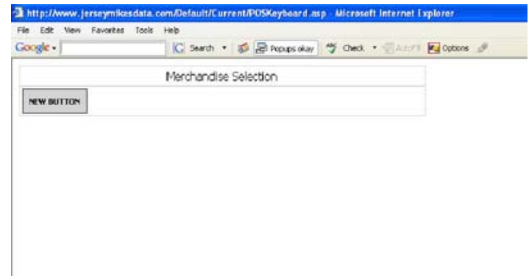
# Setting Up InfoPOS™

**Here you will see how to set up your in-store menu, item modifiers, and the different options available for InfoPOS.**

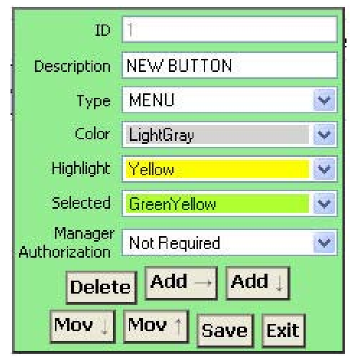
## Creating a Menu




**1.** Click on the tab at the top of the screen that says **InfoPAK**.

**2.** Here you will see a list of menu options on the left side of the screen. Under the bold heading that says "**InfoPOS**", click on the line that says "Menu Layout".

**3.** Now a dropdown box will appear on the screen. Select the store you wish to create or modify from the dropdown menu and click GO.




**4.** You will now be presented with the menu that is currently set up for that store. If this is initial setup of the store, you will just see a button that says "NEW BUTTON".

**5**. Now right click on the gray button and you will be presented with the menu to modify that button.

**ID-** This will automatically be created for you for every button you make.
**Description-** This is what will appear on the button in InfoPOS. You may type whatever you wish here.
**Type-** This determines what type of button this will be.

**Different Types of Buttons-**

**Menu-** this button when clicked opens up another menu of buttons
**PLU-** this button is linked directly to an item
**Extra-** this is an PLU button that adds extras to items
**Dept-** is linked to a Department instead of just one PLU
**Percent Discount-** used for creating discounts that use percentages
**Flat Discount-** used when creating discounts that are dollar amounts
**Mark Down**- used to mark down a whole ticket or just one item to a specified price.
**Balance-** used for adding money to a drawer or taking money out of the drawer without affecting sales totals. Use this type for Gift Cards.

**Color-** This is the default color of the button.
**Highlight-** This is the color of the button when the mouse pointer rolls over it.
**Selected-** This is the color of the button once it has been clicked on, or selected, in InfoPOS.
**Manager Authorization**- This will determine whether a manager's approval will be required when selecting this button.

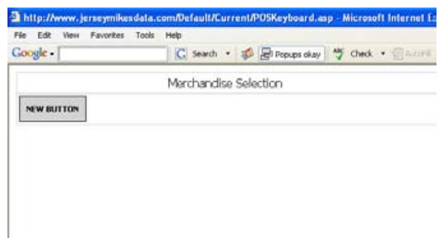
# Setting Up a Menu Button

**A menu button is a button that when selected in InfoPOS, will open up another selection of menu buttons or PLU buttons. Use this to hide buttons that aren't used that often on the screen or to create a hierarchy that presents you with less buttons at the initial start of the transaction.**

**Let's set up a menu button together. Here's how:**

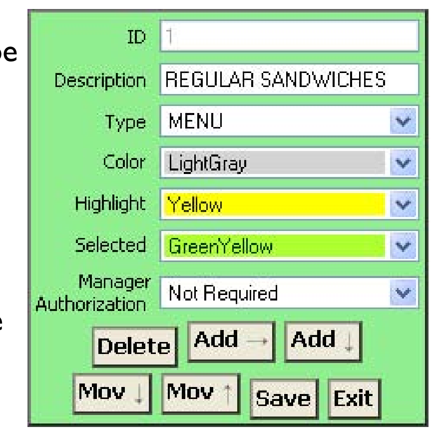
**1.** Go to the menu layout for you store in **InfoPAK**.

**2.** You should have just one button on your screen that says "New Button". Right-click your mouse on this button.




**3.**

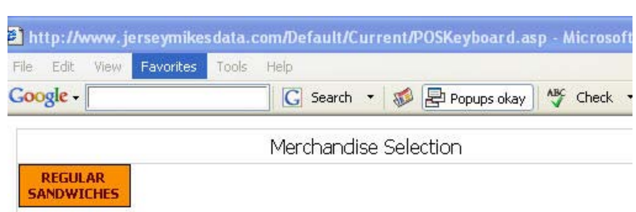
**4.** You should now see the modifying menu. In the Description box, type "Regular Sandwiches" or whatever you would wish to call it.




**5.** Now leave the Type box to say "MENU". In the Color box, choose Dark Orange from the drop down menu.

**6.** In the Manager Authorization box, leave it on the default selection which says "Not Required". Use this box if you would like to require a managers approval to ring in this item.

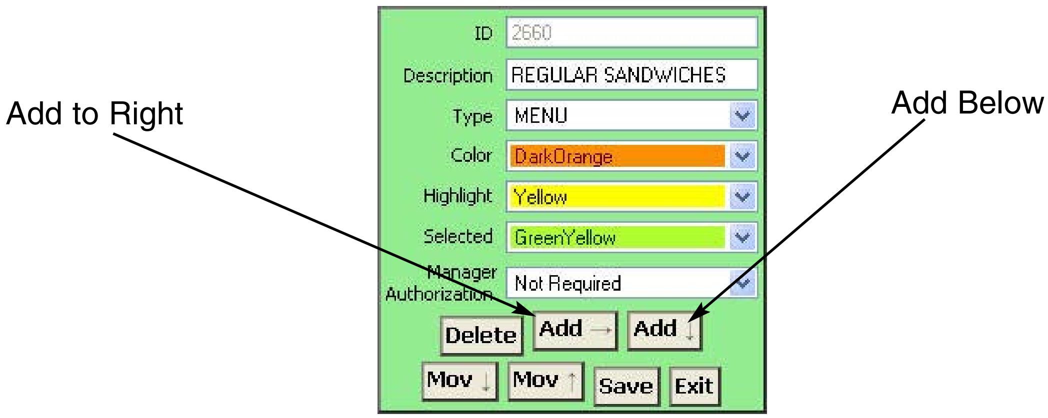
**7.** Now click the "Save" button. The box should now close and your internet screen will refresh. You should now see your modifications show up on the button.



# Adding New Buttons to a Menu Button

**You may add buttons as you need them.**
**To create a new button inside of a menu button, simply do the following:**

**1.** Right Click on the "REGULAR SANDWICHES" button. You will now see the modifier box again. At the bottom of the box you will see two "Add" buttons. The "Add" button with the arrow pointing down will add buttons below the button that is currently selected. The "Add" button with arrow pointing to the right will add a button to the right of that button. You will use this button to add a button into a menu.




**2.** Click the Add to the right button. The page should now refresh and all boxes will close.

**3.** Now left-click on the "REGULAR SANDWICHES" button. This will open up that button and show all buttons that are under that menu. You should see the "NEW BUTTON" that you just added in.

*Now we will change the "NEW BUTTON" to a PLU button.*

# Setting Up a PLU or Extra Button

**A PLU button is what will actually ring an item up on your register screen.**
**Let's set up a PLU button.**

**1.** Left-click on the "REGULAR SANDWICHES" button. This will make out "NEW BUTTON" that we created appear.

**2.** Right-click on the "NEW BUTTON" to bring up the modifying box.

**3.** In the Description, type in an item that is in your store.

**4.** In the Type box, change the button to a PLU.

**5.** Your modifier box should now have more options on it. In the "PLU" dropdown box, you will see all the PLU's you have set up for your store. Select the item you would like to link to that button.

**6.** If you have Menu Options set up(See setting up Menu Options), you can select the ones you would like to turn on by clicking on them in the "Available Options" box.

**7.** Once you are finished, click the "Save" button.


**An EXTRA button sets up the same as a PLU button.**
*The difference is that Extra buttons can only be rang up if there are other items rang up already. If you try to ring up an Extra in InfoPOS without another item rung up already, you will receive a message saying there are no items on the ticket.*

# Setting Up Discount Buttons

**There are several different ways to set up discount buttons for your store. Discount buttons can be used for ringing in coupons, employee discounts, customer service discounts, etc. You have three choices for discount types.**

**Percent Discount-** This will take a percentage off of the item or ticket
**Flat Discount-** This will take a specific dollar amount off of the item or ticket
**Mark Down-** This will automatically mark an item or ticket down to a specific price.

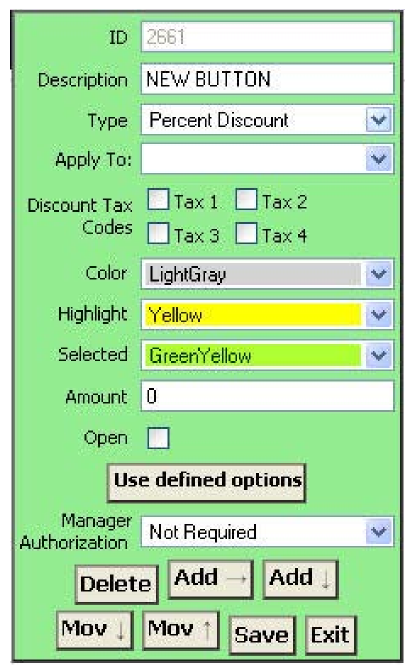
### Here's how to set up discount buttons for your store:

**1.** Right-click on an existing or new button for your store.

**2.** In the "Type" box, select whether you would like it to be a Percent Discount, Flat Discount, or Mark Down.

**3.** Now the modifier box should have additional fields. In the "Apply To" field, select whether you would like the discount to apply to an item, the ticket, or the full ticket. The Ticket option will apply the discount to all the items that were rung up so far. Any additional items after the discount is rung will not be discounted. The Full Ticket option will discount the whole ticket even if additional items are rung in.

**4.** In the Discount Tax Codes boxes, select what taxes you would like the discount to apply to. Check your local tax laws to see how this should be handled.



**5.** In the "Amount" box, type in the default amount for the button to ring in. If you are setting up a Percent Discount, just type in the percentage of discount. Ex: For 50% off, just type in 50. For Flat Discounts, type in the dollar amount you want to take off. For a Mark Down button, type in what you want the button to change the amount to. Ex: If you would like the button to make an item $0.99, then you would type in .99. *(Be sure to use the decimal point.)*

**6.** If you would like the button to be an open amount so you can just type in the discount you want, put a checkmark in the "Open" box.

**7.** Use the "Use defined options" to link the button to a discount selection screen. If you click this button, you will see a box with the available options that you have set up and are available to link to the button. *(See Setting Up Menu Options)* To turn this off, just click the "Enter a Set Value" button.

**8**. When finished, click the "Save" button.

# Creating Balance Buttons

***(Gift Certificates and Paid Outs)***

**You will need to use balance buttons for selling Gift Certificates and putting money in or taking money out of the drawer without affecting Net Sales totals and to ensure that your Cash in Drawer totals are correct at the end of night.**


**1.** For the button "Type", choose the "Balance" type.

**2.** For the "Direction", decide which direction the money will be going during the transaction, either "IN" meaning into the drawer, or "OUT" meaning going out of the drawer. NOTE: Use the "IN" direction when selling Gift Certificates, because you are adding money to the drawer, but this money does not go into your Sales until the Gift Certificate is redeemed for Merchandise. Use the "OUT" direction for Paid Outs because you are taking money out of the drawer.

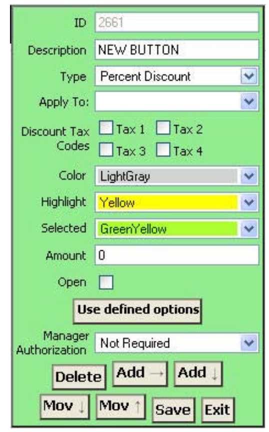
**3.** The "Exclusive Group" box is an option you can use to limit what can be rung up on the same ticket. If left at "0", then this button can be rung up on the same ticket as normal merchandise. If you change the number, that button will only be able to be rung up on a ticket containing items with that same Group number.

*EX: You can set all of your Paid Outs to Group 1, and only Paid Outs with the same Group 1 can be rung up on that ticket. If an item with a Group other than 1 is pressed, InfoPOS will not allow it to ring up.*

**4.** Next, select whether you would like a Managers Approval on that button and select Save when finished.

# Setting Up a Department Button

**You can set up button that is linked to an entire department, instead of a specific PLU. You can use this to ring in an item that is not normally sold in your store and you might not have a PLU button set up for it.**




**1.** Choose DEPT" for the Type.

**2.** In the "DEPT" box, choose the department you would like to link that button to from the dropdown list.

**3.** When finished click the "Save" button.

*Note: When this button is selected in InfoPOS, it is automatically set to an Open Amount and it will prompt you to enter the amount on the onscreen keyboard.*

# Setting Up Menu Options

**The Menu Options is what you will use to set up a modifier screen that is linked to a PLU in InfoPOS. This can be a screen that will have choices for adding different toppings, dressings, flavor choices, etc.**


**1.** Click on the **InfoPAK** tab at the top of the website screen.

**2.** Click on the **Menu Options Layout** menu and select your store from the dropdown box, then click **Go**

**3.** Right Click on the button that says "New Option"

**4**. In the "Parent ID" box type what you would like to call this new option screen.

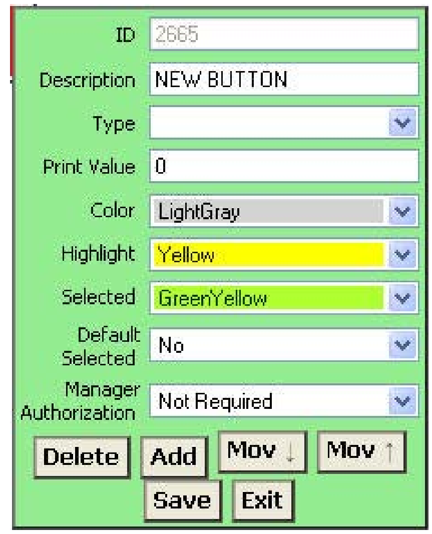
**5.** In the "Option Type" box select whether this will be a **Normal, Discount, or Balance** menu.

**Normal-** This will make this option available for all of your PLU buttons
**Discount-** This will make this option available for all your discount buttons
**Balance-** This will make this option available for all of your balance buttons.

**6**. Select and **Save**


**7.** You will now have a new box for entering in the items you would like to appear when the PLU that is linked to this option is pressed. Right-click on the **NEW BUTTON** that has just appeared. You will now have a box for modifying this button.

**8.** In the "Description" box, type in what you would like the box to say.




**9.** In the "Type" box, select whether you would like it to be a **Preset, Toggle,** or **Radio**.

**Preset-** automatically is selected when the modifier menu pops up
**Toggle-** this allows you to toggle the button on and off
**Radio-** All radio buttons will be in there own column and radio buttons can only be selected one at a time.

*Ex: If you select a radio button in a column, when you select another radio button in that same column the previous radio button will then be deselected.*

**10.** In the "Print Value" box, select how you would like the description to appear on the receipt. Whatever you type in here is what will appear on the receipt.

**11.** In the "Default Selected" box, you can select if you want that button to be the button that is automatically highlighted when the menu first pops up. If you have a column of radio buttons, then you can select which button will be selected by default. You can still change to another selection even if this feature is used. This just makes for faster sales ringing.

**12.** Select Save when finished.

*To set up additional buttons, right-click on the button you have just set up and select "Add".*

## Setting Up Groups

**Menu Groups can be used when catering and you need to be able to modify each item individually in the same PLU. Ex: You can set up one PLU for catering a Party Tray of 5 subs, and the menu group will allow you select what 5 sandwiches are to be used on that party tray and what toppings need to go on each.**

**1.** Under the **InfoPAK** tab select **Menu Groups**. Select your store and click **GO**


**2.** Right click on the button that says "NEW GROUP"

**3**. In the Parent ID box, enter what you want the button to read and click Save


**4.** Now left click that same button. You now have a new box that pops up.

**5.** Right-click on the "NEW BUTTON". You will now have the modifier box. You will set up this button the same as you set up a regular PLU button. (See "Setting up a PLU or Extra Button")

6. Now return to the "Menu Layout" menu. Right click on a button you would like to link this group to.

7. Put a checkmark in the "Groups" box. This will cause the **Available Options** box to change to **Available Groups**

8. Now you can select from the list which group you would like to attach to that button


## Copy Menu Layout

Use the "Copy Menu Layout" feature to copy one store's menu to another store so you don't have to create the menu again. All buttons and PLU links will be copied over without a problem. Note: be sure to have the same PLU's and PLU numbers on both stores to ensure correct button linking.

## Options

The Options screen is where you will change tax, payment types, ticket types, receipt printing, site passwords, etc. In the Options screen at the top you will see a Save, Save and Close, and Cancel and Close

**Save**- Saves your progress so far

**Save and Close**- Saves your progress and closes the window

**Cancel and Close**- Loses all changes since your last save. Use this if you do not want to save your current changes

*You do not have to save your changes before you click on the next tab, but it is recommended.*

## System Tab

1. Click on the Options button under **InfoPAK**
2. Select your store from the dropdown list and click GO

**Title-** The title of your InfoPOS software. (Your store name)
**Site Password**- type in the password that InfoPOS will use for security. This is the password you type in the Site Options screen in the InfoPOS software
**Administrator Password**- sets the password for entering into the Site Options screen in InfoPOS.
**Maximum Ticket Number**- sets the limit for ticket numbers before starting over at 1
**Maximum Order Number-** sets the limit for order numbers before starting over at 1
**Address Style**- Sets the address style in the customer lookup
**Edit Item Button**-turns on and off the Edit Item button in InfoPOS
**Universal Tickets**
**Touch Screen**- turns off the onscreen keyboards in InfoPOS
**Customer Style**- Select how you would like to keep track of your customers. The "Customers" option, will allow you to enter in their address, phone number, notes, etc. The "Call Name" option will let you quickly type in a name for attaching to a ticket. You can choose to use just one, both, or none of the customer lookups.

**Customer Lookup**- Pop-up creates a pop up menu for entering customer information, and Inline leaves the customer look up fields onscreen at all times

**Compress Customer Lookup**

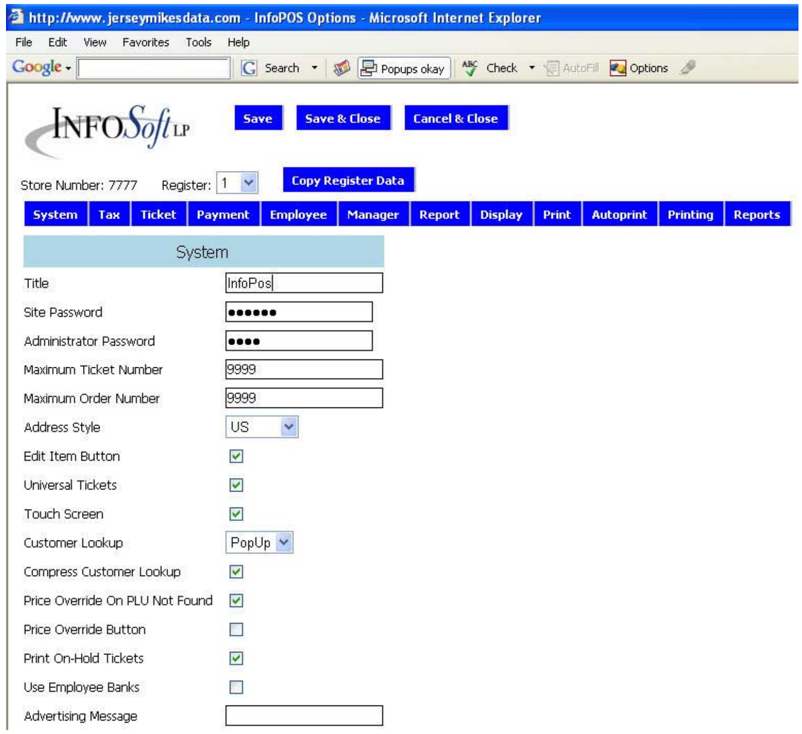
**Price Override on PLU Not Found**- when selected, this will cause an override price screen to pop up when a button cannot find it's PLU

**Price Override Button**-turns on and off the Price Override button

**Print On-Hold Tickets**- this turns on and off the ability to automatically print a Hold receipt when a ticket is put on hold

**Use Employee Banks**- turns on and off the option to use Employee Banks for deliveries

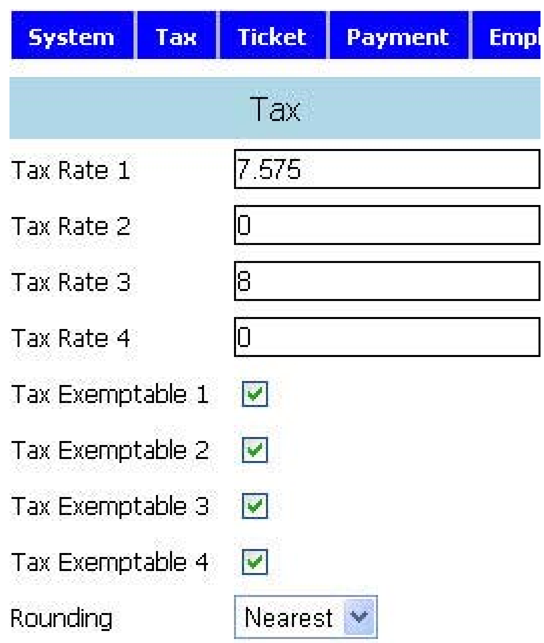
**Advertising Message**- Enter the message you would like to scroll across the customer display when it's inactive for a couple of minutes



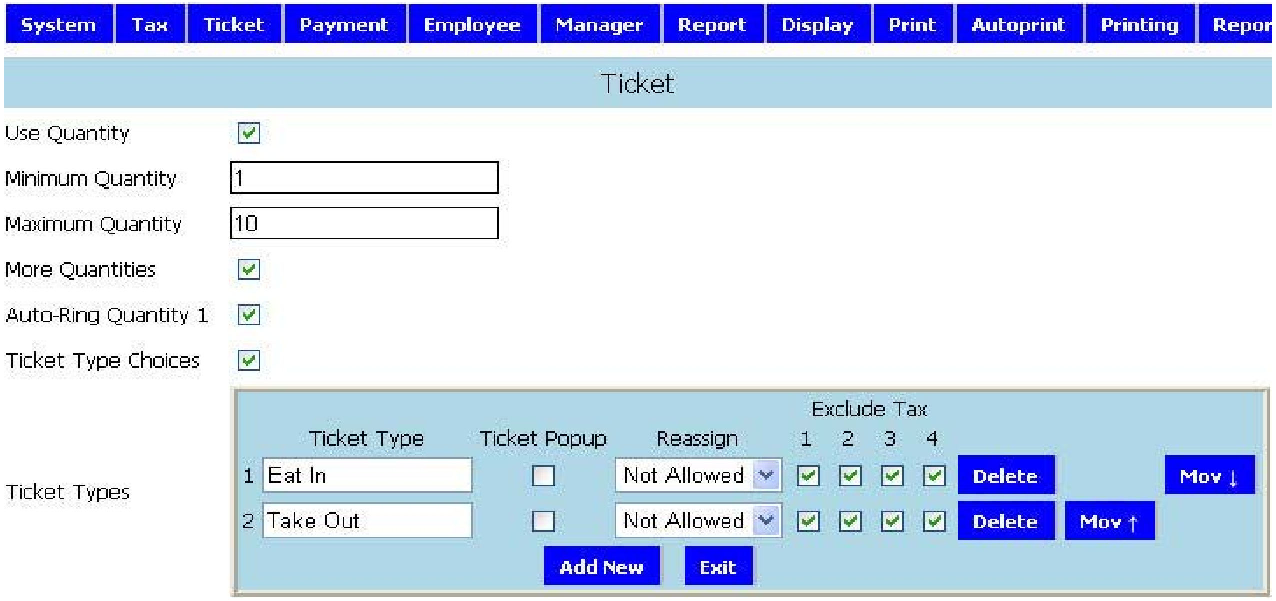

## Tax Tab

Use this tab to set your different tax rates.
Use the tax exemptable boxes to select which taxes will be exempt when using the tax exempt button in InfoPOS.

**Rounding**- select how you would like tax to round when the tax doesn't come out even.



# Ticket Tab




**Use Quantity**- turns on and off the quantity selection screen in InfoPOS when an item is rung
**Minimum Quantity**- this is the smallest Quantity button that pops up
**Maximum Quantity**- this is the maximum quantity button that pops up
**More Quantities**- this will provide an onscreen keyboard for entering more quantities
**Auto-Ring Quantity 1**- this will automatically ring in one item when a PLU is selected. To change the quantity, you then select the item you want to add more quantities to and select Edit Item.
This will cause the quantity box to pop up.
**Item Notes**- This will turn on the notes field in the modifier pop-up menu so you can type in custom notes for a particular item.
**Ticket Types**- Click the blue Ticket Types Box. This will allow you to add ticket type choices to your menu. (Eat in, To Go, etc.)

1. Click the "Add New" button

2. Under Ticket Type, type in what you would like the ticket type choice to be.

3. Check whether you would like the Ticket Popup to appear on that ticket type. This is the modifier screen that pops up with your PLU options. (See Setting Up Menu Options)

4. Select whether you want to require, allow, not allow the ticket to be assigned to another employee.

5. Choose if what taxes will be excluded on that ticket type. Some states require different taxes for Eat In and Carry Out.

6. You can use the Delete button to delete that ticket type choice if you wish.

# Payment Tab

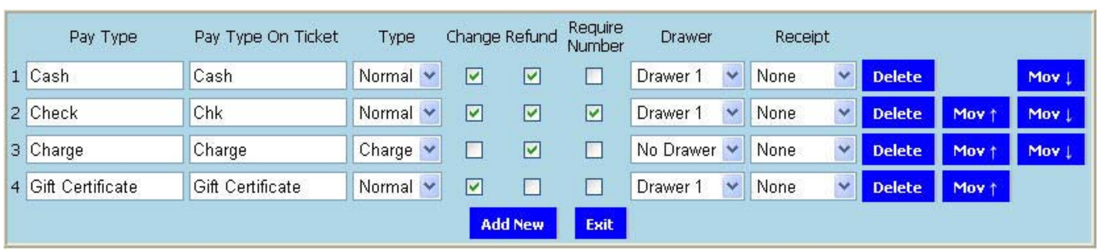
**This will set up your payment types, quick pay options, currency types, and tips on credit cards**


**Tips-** check this box if you would like InfoPOS to pre-approve a credit card for an amount higher than the ticket total for use with tips.

**Tip Margin**- this determines the percentage of the check total will be pre-approved for tips. Ex: If the total of the ticket is $10.00 and the Tip Margin is set to 25%, InfoPOS will pre-approve the credit card for the $10.00 and an additional 25%, or $2.50 in this case. It will not automatically charge the extra 25%, it just pre-approves.

**Payment Types**-click on the blue box to open up another menu. Here you determine what payment types you would like to accept.

**1.** Click the Add New button
**2.** In the Pay Type field, type in what payment type you wish to accept.



| | Pay Type | Pay Type On Ticket | Type | Change | Refund | Require Number | Drawer | Receipt | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Cash | Cash | Normal | ☑ | ☑ | ☐ | Drawer 1 | None | Delete | | Mov ↓ |
| 2 | Check | Chk | Normal | ☑ | ☑ | ☑ | Drawer 1 | None | Delete | Mov ↑ | Mov ↓ |
| 3 | Charge | Charge | Charge | ☐ | ☑ | ☐ | No Drawer | None | Delete | Mov ↑ | Mov ↓ |
| 4 | Gift Certificate | Gift Certificate | Normal | ☑ | ☐ | ☐ | Drawer 1 | None | Delete | Mov ↑ | |

Add New   Exit

**3.** In the Pay Type On Ticket, type what you would like the payment type to read on the ticket
**4.** In the Type dropdown box, select if the payment type is a Normal(Cash), Debit(Debit Cards), or Charge(Credit Cards) NOTE: If you are using a separate credit card terminal to process credit cards, select Normal for the Charge Type. This will keep track of your credit card sales without prompting you to swipe the credit card on the register terminal.
**5.** Next select if you would like to offer change back, be able to refund this payment type, or require a number. (Use the Require Number for entering in the check number)
**6.** Select what drawer you would like to open when that payment type is selected
**7.** Then select if you want a single receipt, duplicate, or no receipt. NOTE: When running credit cards, you will always receive at least two receipts even when "None" is selected.

**Pay Amounts**- this you can use to set up what kind of Quick Ring choices you have on your pay screen.

Just enter in the different amounts you want available

**Base Cash Type-** This will be your default currency type
Alt Cash Types- select this if you would like to accept additional currency types

1. Enter in the first currency type you would like to accept in the Alt Cash Type 1 box

2. Enter in the current exchange rate for that currency. If you are unsure, you can click the "Click to see current exchange rates" box. This will link you directly to the currency exchange rate website, so you can find the most up-to-date exchange rates.

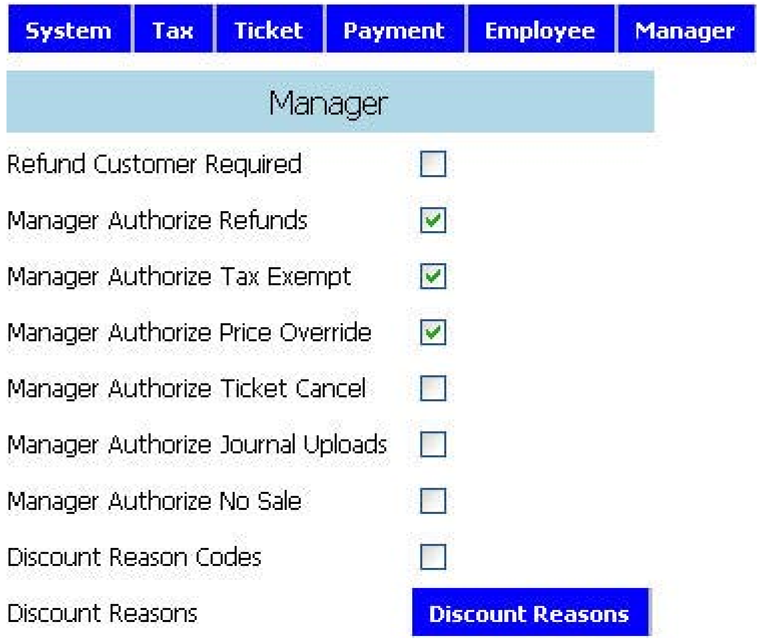
## Employee Tab

**This tab sets up how your employees will use InfoPOS**


**Sign On**- This option, when selected, will require an employee to sign on in InfoPOS
**Sign On Per Transaction**- This will require the employee to sign on after every transaction
**Password Protect Sign On**- Requires the employee's password to be entered in order to sign on
**Time Clock**- This turns on the time clock feature in InfoPOS
**Password Protect Time Clock**- This will require the employee to enter their password in order to sign on

# Manager Tab

**This is where you can decide what features in InfoPOS will have manager control**




**Refund Customer Required**- This will require a customers information be attached to a refund transaction
**Manager Authorize Refunds**- This will require a manager's approval for refunds
**Manager Authorize Tax Exempt-** This will require the manager to approve a tax exempt transaction
**Manager Authorize Price Override-** Manager's approval required for a Price Override
**Manager Authorize Ticket Cancel-** Require a manager's approval when the Cancel button is pressed
**Manager Authorize Journal Uploads-** Require the manager's approval to upload the journal files to the web-site
**Manager Authorize No Sale-** Will require the manager to approve a No Sale
**Discount Reason Codes**- This will prompt a box to appear with a selection of reasons for a discount. This box will appear on all discounts
**Discount Reasons**- This is where you can set up the discount reason choices you would like to be available


1. Click the blue "Discount Reasons" box
2. Select the Add New button
3. Type in the description for a discount you would like in the box that appears. What you type in here is what will be available for selection when a discount is given if you have the "Discount Reason Codes" checkbox checked.

# Report Tab

**This is where you will set up how you want your tax to report on your Sales Report**

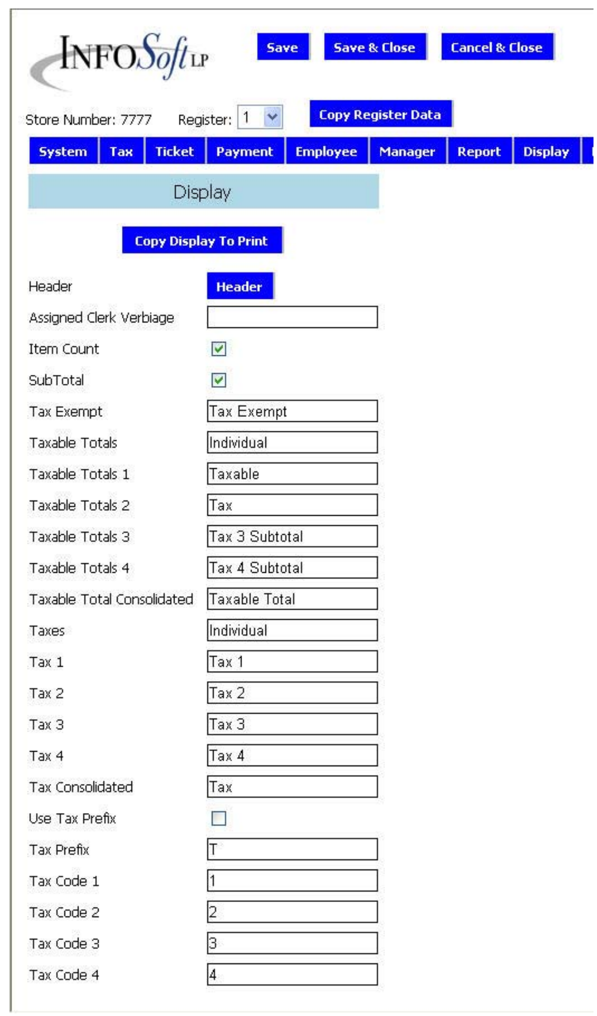

Simply type in how you want your tax to read on the report. Ex: you can set it up like the example in the picture, or you might want to say Tax 1 is the Eat In tax. Simply type "Eat In" in the Tax 1 box.

# Display Tab

Here you will set up how you want the top *(The area above where the sales are rang in)* and bottom *(The area where the subtotal, tax, etc. is located)* part of the Ticket display to read.

The example in the picture is the recommended way of setting this up, but feel free to customize this however you would like.

The "Copy Display To Print" button at the top of the screen will allow you to copy all the information you entered here to the Print tab so your display and receipt appear the same. You may also set them up to read differently if you would like to have something appear on your screen that you do not want to print on the receipt.



**Header-** The blue "Header" box at the top is where you can set up the top of the ticket display


1. Click on the blue "Header" box
2. Click the Add New button in the new box that appears
3. Now you can select what you want to appear on the left and right sides of the display by choosing from the selections in the dropdown boxes

**NOTE:** *You may not be able to put some choices on the same line as each other due to lack of needed space. You will receive a message telling you if an area is too small to handle those two selections.*

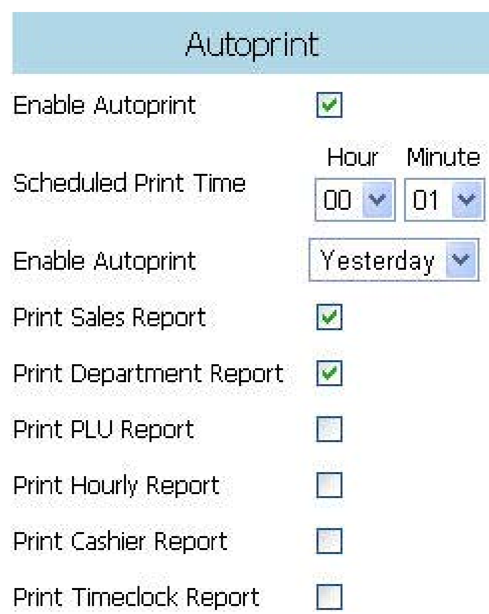
## Print Tab

**This is where you will set up how you want the receipt to print. See the "Display Tab" to see how to set up the Print Tab. The set-up is the same although you may wish to have the receipt print differently from what is on the display.**

## Autoprint Tab

**This section will let you set up InfoPOS to print out your desired reports automatically at certain times of the day. To set up an autoprint, simply do the following:**

1. Check the "Enable Autoprint" box
2. Schedule what time you wish your autoprint to run
3. In the "Enable Autoprint" dropdown box, select whether you would like yesterday's report or today's report.
4. Select what reports you would like InfoPOS to print when the autoprint feature is ran



# Printing Tab

**This tab will let you set up how the printer will print your receipt. You can select what lines to bold, make larger, underline, etc. You can also set up a header and footer for your receipt.**

Printing

**Logo Headers**

| | Justification | Large | Bold | Double Wide | Double High | Underline |
|---|---|---|---|---|---|---|
| Ticket Header | Center | | | | | |
| Sale Item Line 1 | Left | | | | | |
| Sale Item Line 2 | Center | ✓ | ✓ | ✓ | ✓ | |
| Sale Item Other Lines | Left | | | | | |
| Extra Line 1 | Center | | | | | |
| Extra Line 2 | Left | | | ✓ | | |
| Discount Line 1 | Left | | | | | |
| Discount Line 2 | Left | | | ✓ | | |
| Ticket Footer | Center | | | | | |
| Dividers | Center | ✓ | | | | |
| Reports | Left | | | | | |
| Time Clock | Left | | | | | |

**Logo Footers**

**Logo Headers-** Here you can set up your company name, address, phone number, etc. to print at the top of the receipt

**Logo Footers-** Here you set up a message to print at the bottom of the receipt

# Copying To Multiple Registers

**At the top of the screen, you will notice a blue box that reads "Copy Register Data". This allows you to copy all the information and changes you made to other registers in your store. Simply click this blue box and type in what register you want to copy to.**