INI POS SOLUTION

INI POS (RESTAURANT)

User Manual

2017 Ver.

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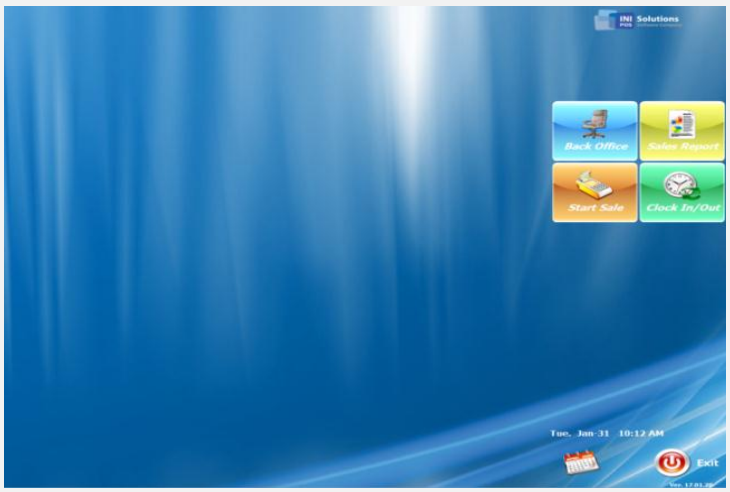
1. Getting Started

Welcome to INI's Point of Sales system. This manual is made to provide you simple and easy instructions for using our software program. Throughout this document, all the important features of our software will be explained in step-by-step instructions.

This section will introduce you to the home page, which serves as a gateway into four main branches of the user interface.



This is the "home page" of our INI POS. You will see this screen immediately when you start our POS restaurant program.

This is **Back Office** which leads you to features that can adjust your existing menu, add entirely new items, make changes to users, perform sales reports, etc. An administrator's password is required to enter the back office.

This is **Start Sale** where non-administrators will spend most of their time. It leads you to the main POS interface, where you will take orders and process payments.

This is **Sales Report**, an administrative feature which allows you to view, print or export (either file or CSV format) your sales report data. An administrator's password is required to use this feature.

This is **Clock In/Out** function that only users registered in POS database are allowed to use. (This function will be explained in more detailed in section 11)

2. How to place an order

a. Single order

To start sales, press 

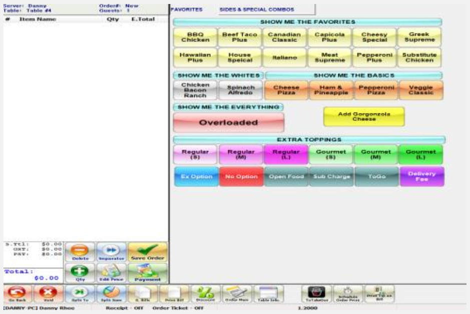
start sales button and then press  button. You will be prompted for a user password.

This is the main Sales Interface. To place an order, left click or tap the table or takeout button where you want to put an order.

(The appearance of this screen will vary depending on how your table layout was configured. Refer Section 8)

Depending on your setting, you may be prompted to identify yourself. Select the appropriate name for the list and press Ok button.

(Refer to Section 10 for more information)



This is the “Order list” choose appropriate item by browsing your item from the right panel on the screen. Choose from correct category tab and then press the appropriate item button. Pressing item more than once increases the quantity.

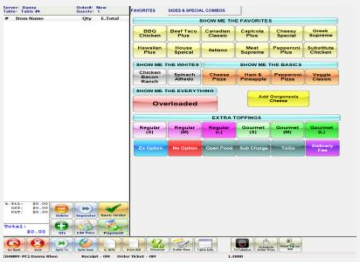
Press 

to process your order.

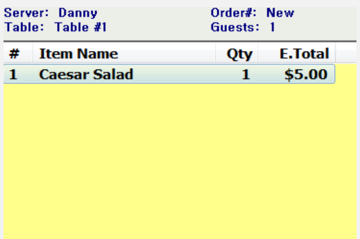
b. Separate orders

You may need to separate orders for a variety of reasons when two or more customers are dining at the same table or even for a single takeout order. Please follow the steps below.

Let's assume two different customers in same table ordered two different salads.

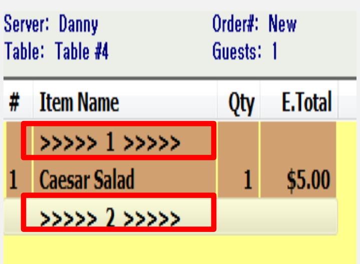


From order list press the items that customers ordered (Ex: Caesar and Greek Salad).

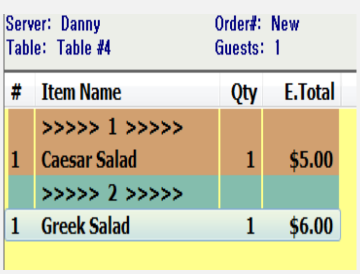


You will see Caesar salad added to the item list.

Then, press the "Separator" button located in left bottom of the screen.



By pressing Separator button you will now see two different lines separating two different order items.

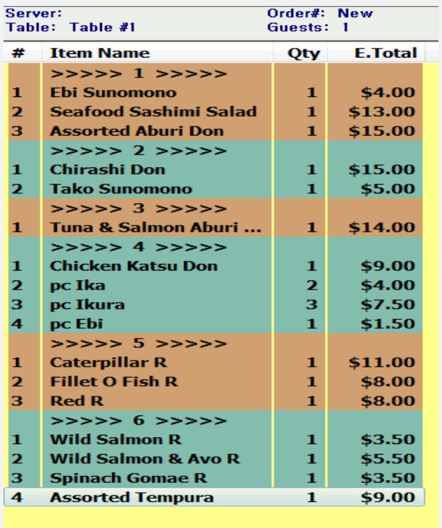


Press the next item, Greek Salad, from the order list. You will now see two different separate orders.

Don't forget to press  at the end.

b. Separate orders (Continue)

Let's try another example. This time, let's assume there are 6 different orders from 6 different customers in the same table.

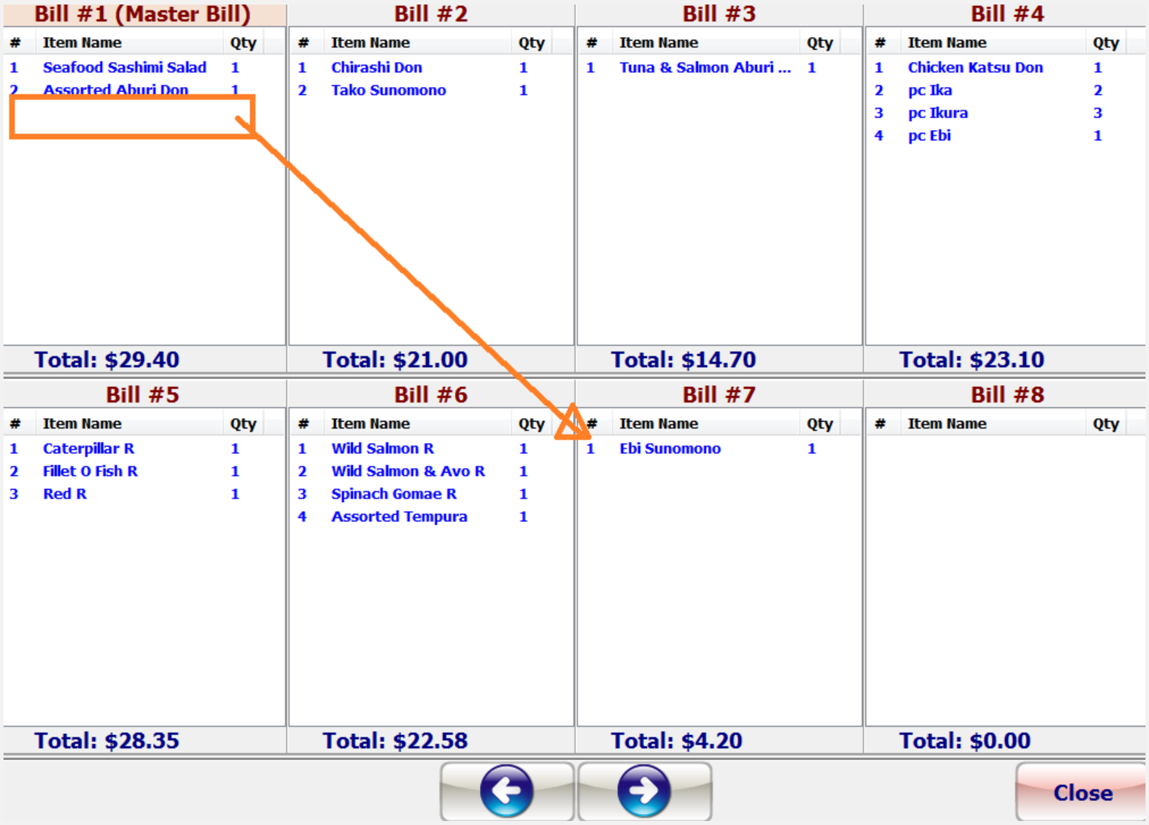


On the left screen, there are 6 different orders listed in the item list. As the number of orders and customers increases, it will be harder for servers to figure out all orders in one order list. This is when you may use 

button which is located at left bottom side on main sales interface screen.

As you can see from picture above, by pressing 

button, all 6 orders are now divided into 6 different single order lists. You may also transfer any items from one order list to different order list. For instance, you can transfer Ebi Sunomono from Bill #1 to Bill 7 by dragging (Please refer picture below).



c. Item price modification

There are three methods to modify the item price:

i) Through 

button (Only this method will be explained for now)

ii) Through 

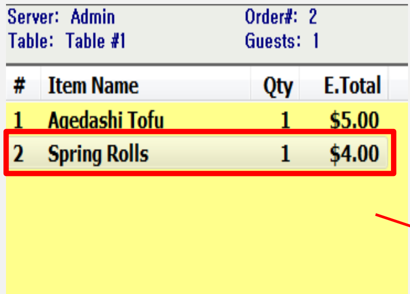
button (Please refer 3.c. for detailed info.)

iii) Through accessing the items directly from 

interface (Refer 6.c. for more info.)

Of these 3 methods, only the last option, modifying the prices manually and directly from 

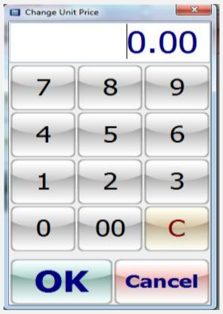
interface, would change the item prices permanently (unless altered again using the same method). The first two options change an item's price on the fly and for that instance only.



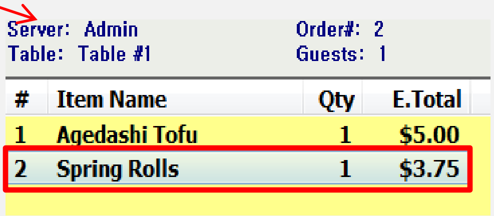
First of all, the menu item that will be modified should be on the item list like the picture on the left.

Click the item you wish to modify. Then, press 

button.



Enter the unit price as desired then press OK.



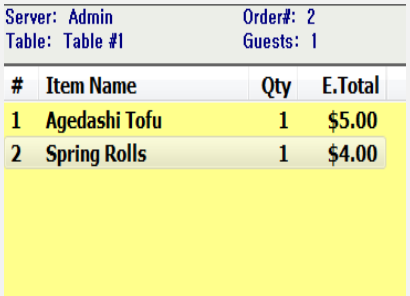
(Do not forget to press 

at the end)

d. Delete and quantity change

Please note that deleting an item from the order list completely removes it regardless of its quantity.

<u>To delete</u> an entered item from the order list:



Click the desired item you wish you delete, and then press 

button. Enter Administrator password if required.

Press 

at the end.

<u>To adjust</u> the quantity of an entered item from the order list:

Adjusting the item quantity is basically the same as deleting item. First, click the desired item in the order list. Click 

. You may adjust the quantity by entering the number manually or pressing +/- buttons.

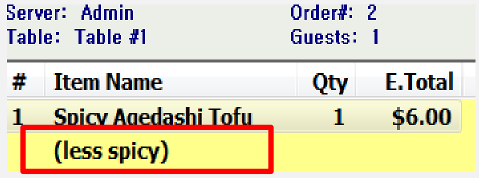
Make sure you press 

at the end; otherwise, the adjustment will not be applied.

e. Order memo

Order memo allows you to add additional information below the items in the order list. Press a desired item in the order list then press 

button along the bottom row. Then, write down your memo and press Save Order.

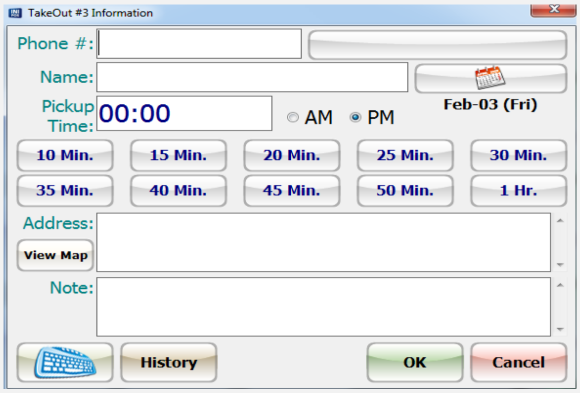


f. Take-out orders

Placing take-out orders is basically the same as placing the normal orders explained above. The only difference is that you have to press 

instead of 

from the main sales interface.



Before you place your order, you first have to enter customer's phone number, name, pick-up time and address. Entering this information is optional, but it will be beneficial.

After entering information and pressing OK, you can place your order (Refer Section 2.a.).

g. Taste options

Taste Options are modifiers, and appear just like regular items in the Order List screen, likely under the "Other" tab (and elsewhere depending on how your POS Station was configured).

They are in essence pre-made notes. They enter phrases like "no sauce", "extra spicy", "no vegetables", etc.

To use a Taste option item

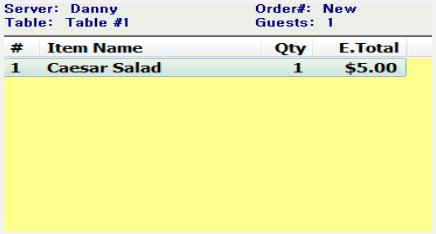
i) Press a desired item from the order list

ii) Enter your desired Taste option by clicking it like any other regular items

(Please refer to sections 6.b. and 7.c. for more detailed information)

3. Printing bills and discount function

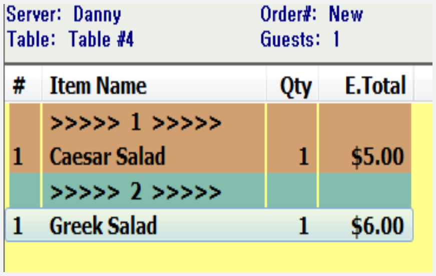
a. Single bill



If it is a single order, press 

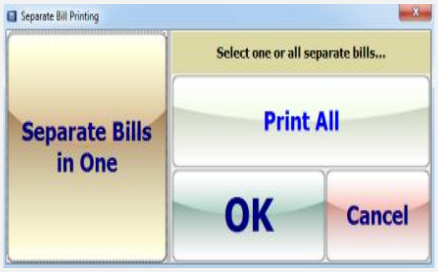
button located at the bottom.

b. Separate bills and one page separate bills

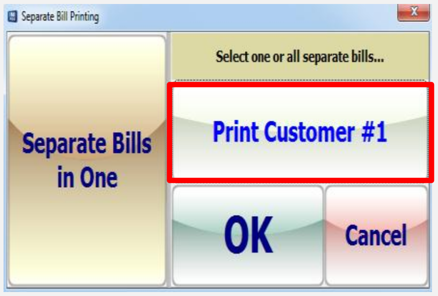


If it is more than one order, press 

located at the bottom.



If customers wish to have two different bills in one paper, press “Separate Bills in One” button. If customers wish to have separate bills, set it as “Print All” and press OK.



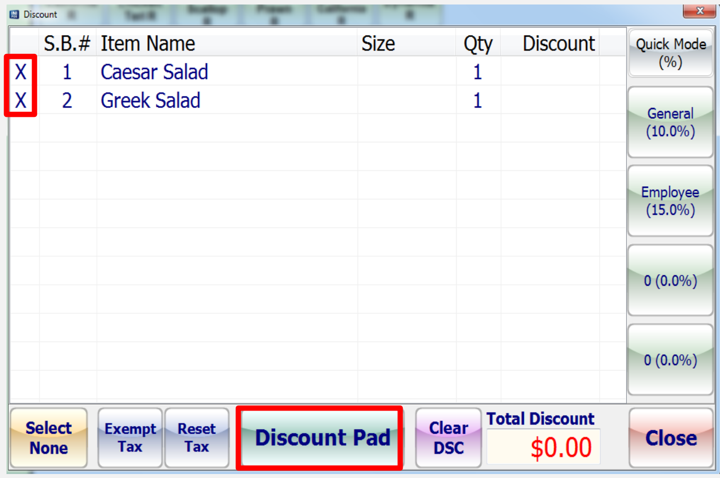
If you only wish to print the first order (ex: Caesar salad), press “Print All” button. It will then switch to “Print Customer #1” button. Set it as “Print Customer #1” then Press OK.

(If you press “Print Customer #1”, it switches to “Print Customer #2”)

c. Applying discounts (Temporary)

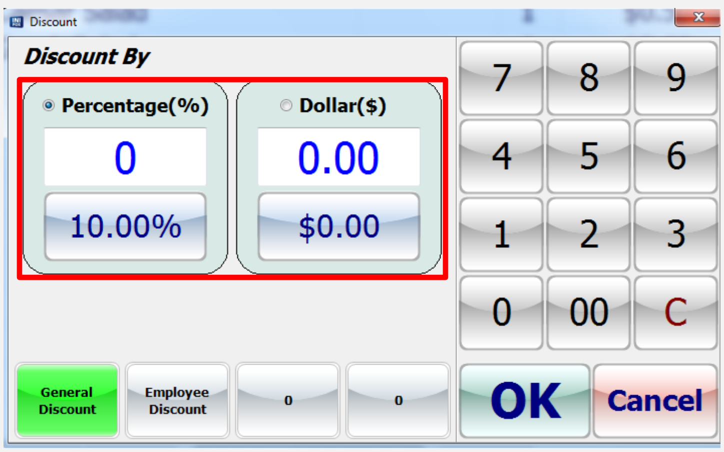
As briefly mentioned above, 

button allows you to have temporary discounts on any items. If you press "Discount" button, the following screen will appear.



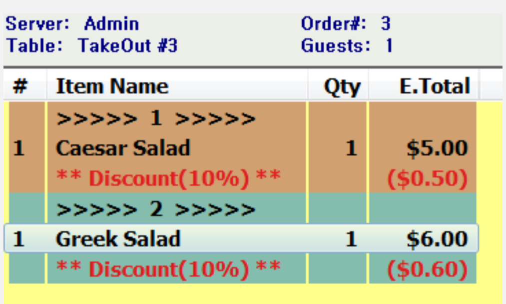
The "X" sign on the left side of each item menu mean that these items are on discounts. If there is no X sign beside menu item, that item is not on discounts.

(If you click X sign, it will disappear)



Pressing the "Discount Pad" located at bottom center will bring up the following window where you can manually enter a discount. You may choose either percentage or dollar amount discounts.

If you are finished, press OK.



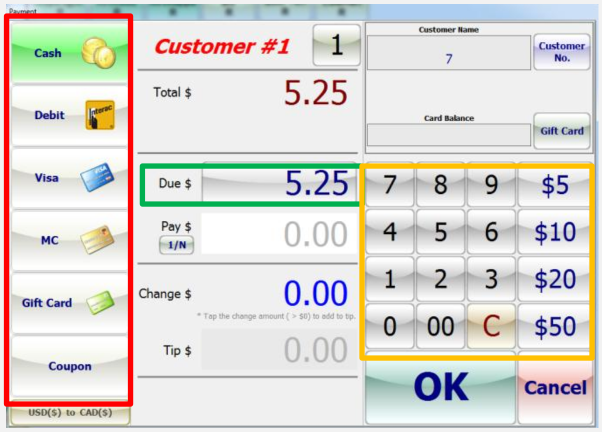
After applying 10% discounts, you will see discount amounts of each item in red.

Don't forget to press 

button, otherwise discounts will not be applied.

4. **Payment and tip**

a. Single payment



You will see the following screen when you press 

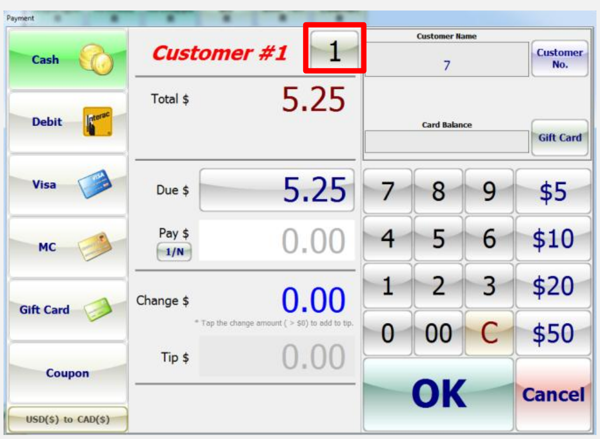
button for single order payment. First, select one of the desired payment methods located left side on the screen. You may either enter the desired amount with the number key pad on the right side of the screen or press the amount seen on the screen (ex: $5.25). Then, press OK button.

b. Separate payment

When customers are paying separately, please print the bill separately (refer section 3.b.) Then, press 

button. Separate payment is basically performing more than one single payment. For instance, let's assume you are doing two separate payments for the same table.

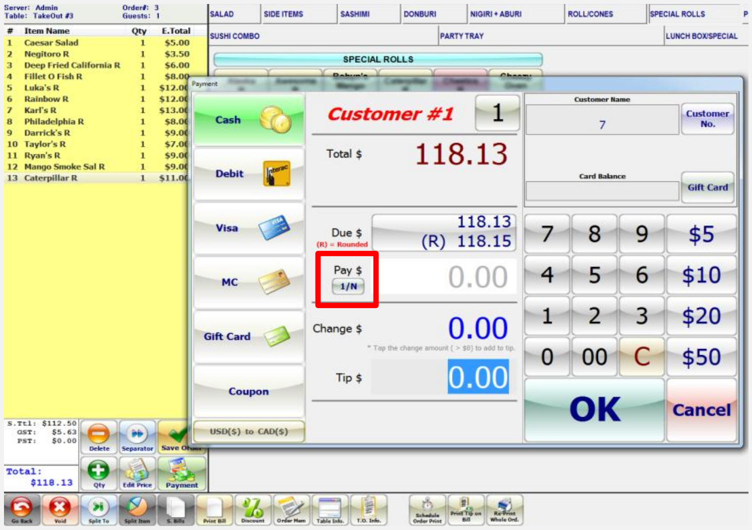
The screen on the left is for the first customer; perform the payment as explained above. Then, press number 1 located inside red box on the left screen. You will then see the second payment screen for the second customer. Also, perform the payment as explained above.

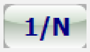


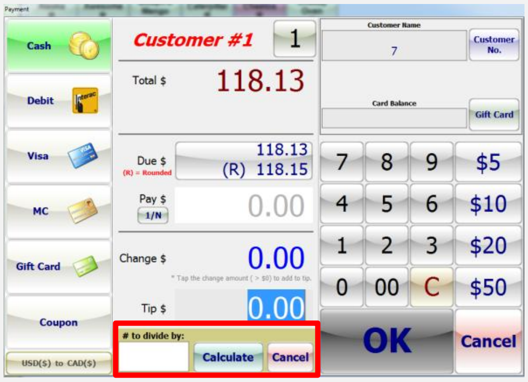
If the bills are not printed separately, two orders above will be considered as one single order. If you wish to perform separate payment without printing separate bills, press  before you perform payment.

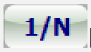
c. 1/N payment

Let's assume 5 customers are sharing all their foods together and paying equally. This way, payment will be much convenient.



Press  button then press  button inside the red box on screen above.



After pressing  button you will see the following screen.

On bottom side indicated by red box, it asks for "# to divided by"

As we assumed there are 5 customers, enter 5 and press calculate button.

Then, you will see that the total price is divided by 5. You can now perform 5 same single order payments.

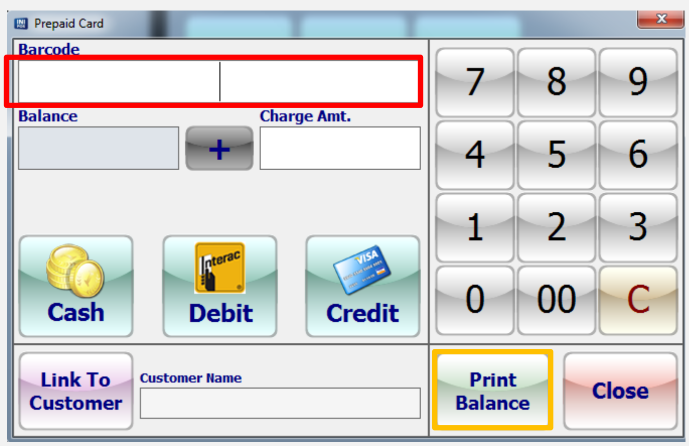
5. How to use Gift cards

Gift cards are a great way to promote your business, and INI POS can help manage them. All gift cards can be registered into your database quickly and easily with a unique barcode or number designated by you. This allows you to easily keep track of a Gift Card's remaining balance.

To use gift card feature, press 

button located bottom of the sales interface screen. Then, press P.card button.

a. How to load a balance



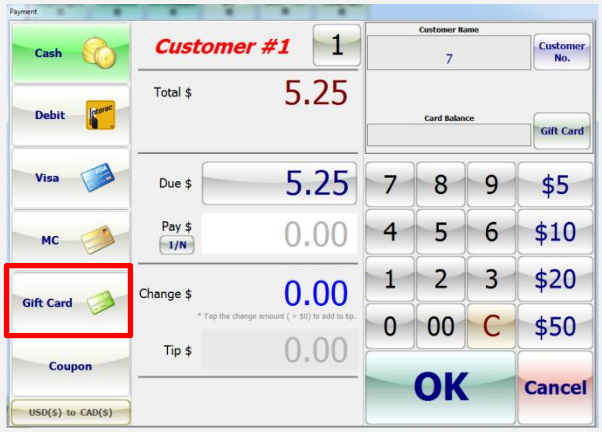
When you enter the administrator's password you will then see the following screen. Enter the desired barcode number (ex: 0000100) and charge amount.

Choose the payment method: cash, debit and credit.

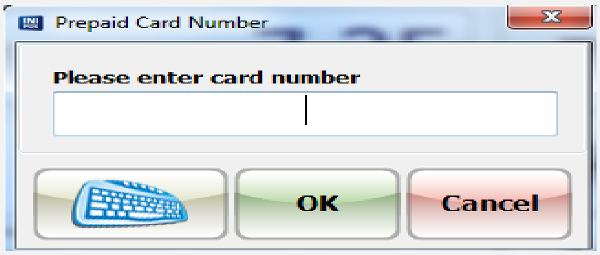
Pressing "Print balance" button will print the bill for the gift card.

(Gift card barcodes are unique. Utilizing a numbering system with many leading zeros is recommended when first creating your barcodes)

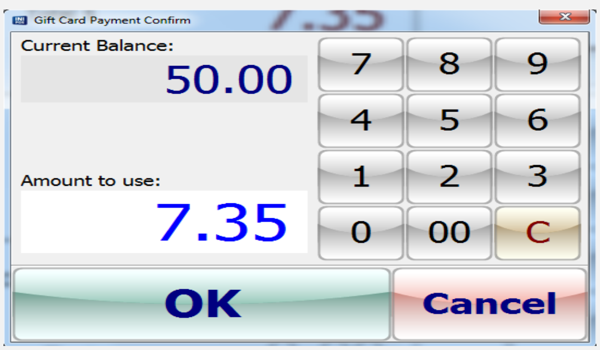
b. How to accept gift card payments



Press  button. Then choose gift card as your payment method.



Enter the unique barcode (ex: 0000100) then press OK.

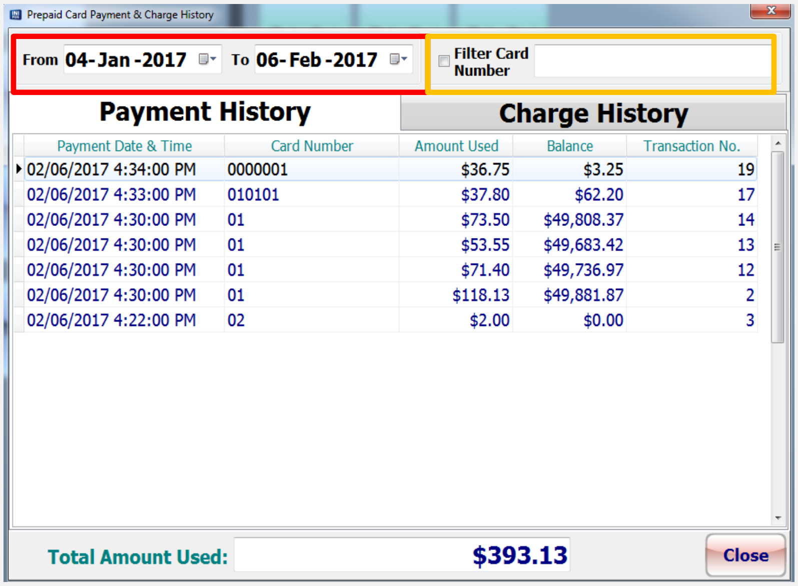


The current balance for the gift card is indicated above.

Press OK to proceed your payment.

c. Gift card history

To see the gift card history, press “More Buttons” then  button.



Then, the following screen will appear. You may now view the history of all prepaid cards within a time range set at the top or you may search for a specific gift card by entering its barcode.

(The box beside "Filter card number" must be checked in order to search for a specific gift card)

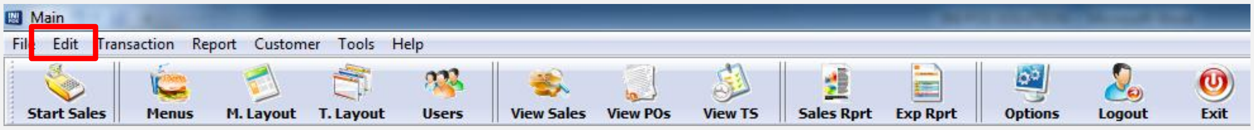
6. Menu modification

To add/edit menu items, you must enter Back office Interface, 

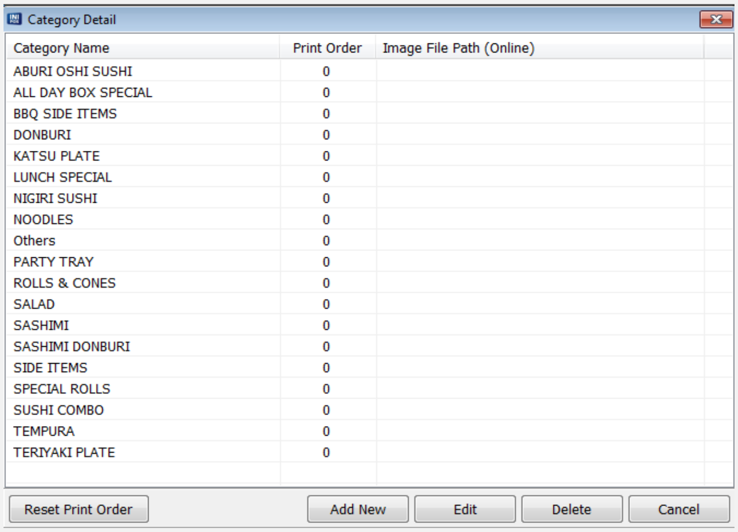
, and must have the administrator's password. To do so, exit the Sales interface, 

, and press the Back Office button from the Homepage.

a. Adding Categories

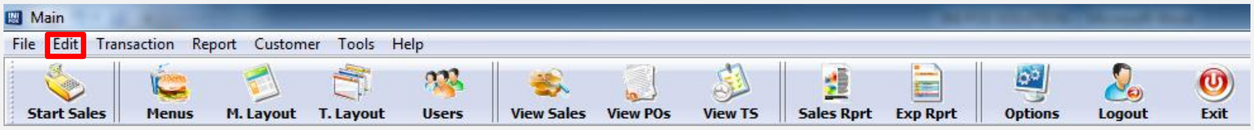


- To create categories, press edit located at left top corner
- Press Category Detail
- To create new category, please press "Add new" button
- To edit existing categories, press "Edit" and adjust setting as desired
- Press "Save" button at the end

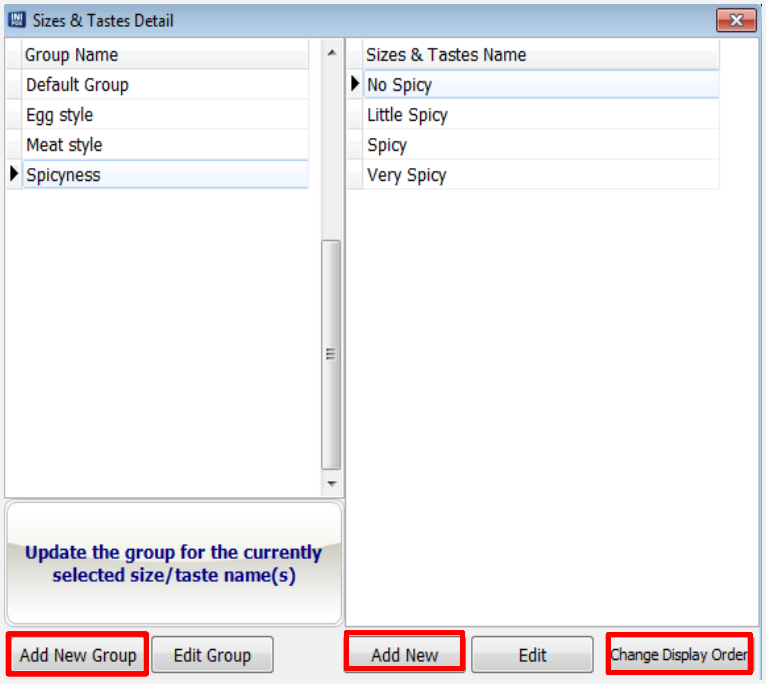


As seen by following screen, categories are added to the category list. The menu items that will be created later on (refer section 6.c.) will be placed into appropriate categories. For example, Greek and Caesar salads will be placed into Salad category.

b. Adding Size/Taste items



To add size/taste items, press “Edit” button then press “Sizes/taste items.”

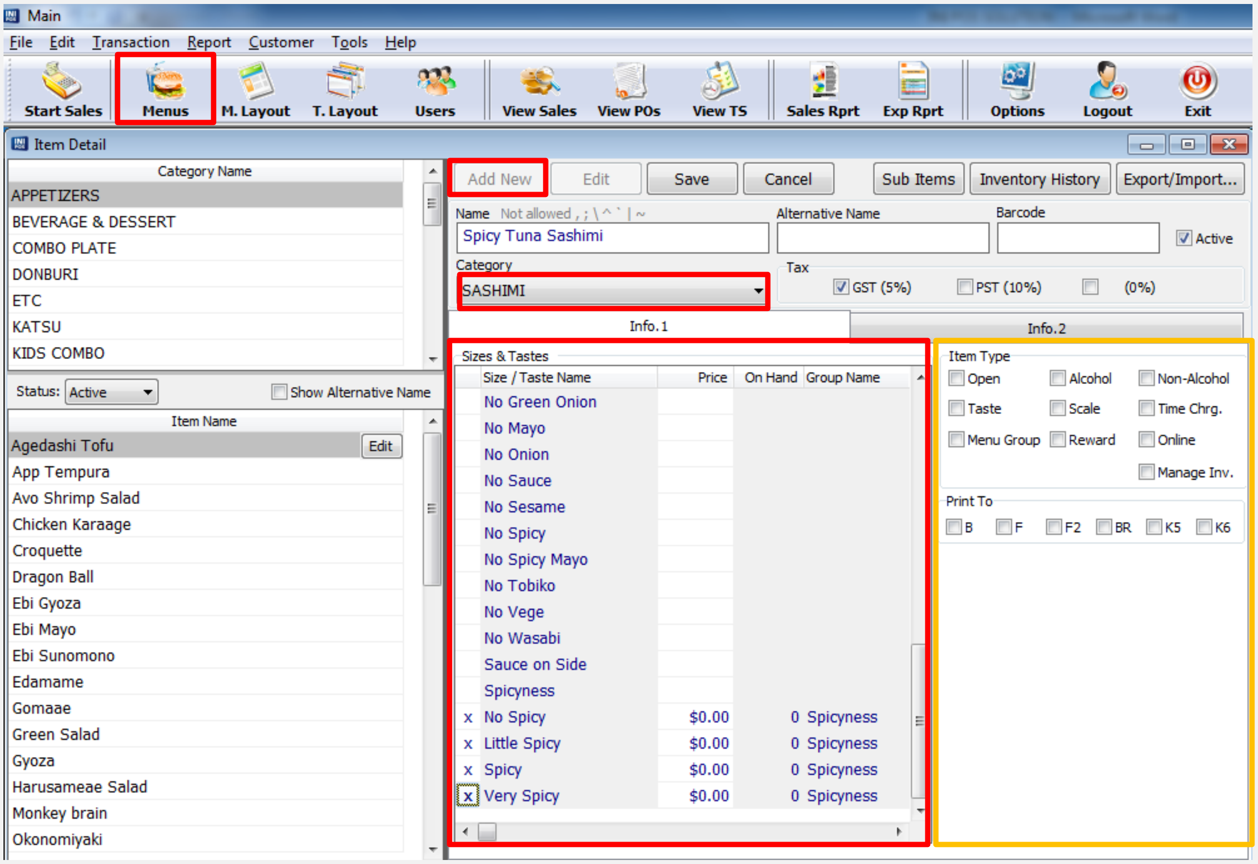


You can create new size/taste group by pressing “Add New Group” button at left bottom. Size/taste function allows users to put additional information on size and taste of the items.

For example, you can add “Spiciness” as a size/taste group (by pressing add new group) and then press “Add new” button to add the spicy level as shown by the following screen.

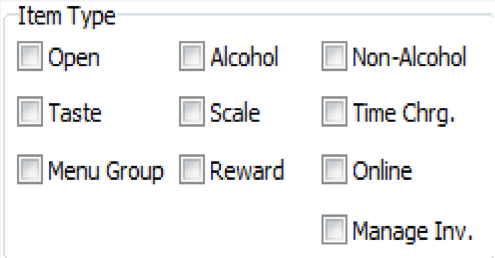
(Orders of the sizes/taste options on the right side can be arranged by pressing “Change Display Order” button)

c. Adding Menu items



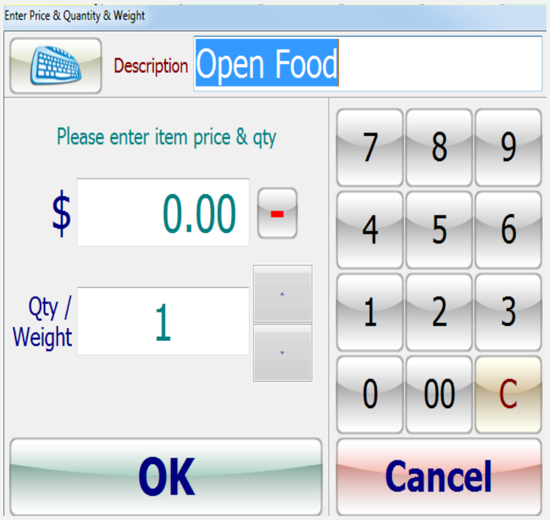
- To create menu items, press  button located at left top corner
- Press “Add New” button to add new items (Ex: Spicy Tuna Sashimi)
- Choose appropriate category (Ex: Sashimi)
- The red box indicates Size/Taste options. Here you may use size/tastes options explained above in section 6.b. (Ex: Spicy level)
- You may enter desired price
- If there is no size/taste options you wish to add on specific items, please check “No Size” at the top of the Size/Taste options then enter desired price for that item
- The orange box on the right side of the screen indicates “Item type” and “Print to” options (refer next page for more detailed information)
- GST is included for every items automatically
- Please check appropriate options inside the orange box
- Press Save

(If you wish to add a lot of menus in more convenient and fast way, please refer section 7.d.)



This is “Item Type” option. The important ones user must know are: Open, Alcohol and Taste.

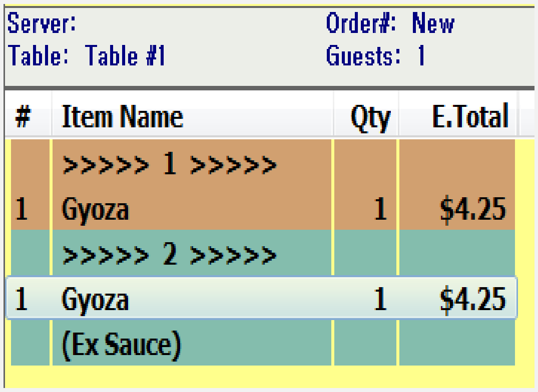
Alcohol must be checked for alcohol items. If “Alcohol” is checked, all the alcohol will be indicated separately with other menu items to be recognized easily on the Sales Report.



When “Open” is checked, the item will be created with no specific price. The price for items with open option checked will always have to be entered manually.

This option is useful for items that have seasonal price.

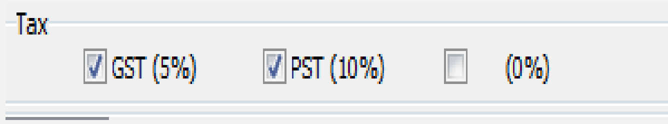
The screen on the left appears when you press item with open option checked in  interface. Enter desired name and price and press OK.



When “Taste” option is checked, additional information or sub-item will be placed under regular menu item. You can use taste option when customers want additions to their orders. For example, there are two gyozas ordered on the left screen: one customer wants regular gyoza and another customer wants it with the extra sauce. By pressing size/taste button that is already made, you may easily add any particular size or taste options according to customers’ preferences.

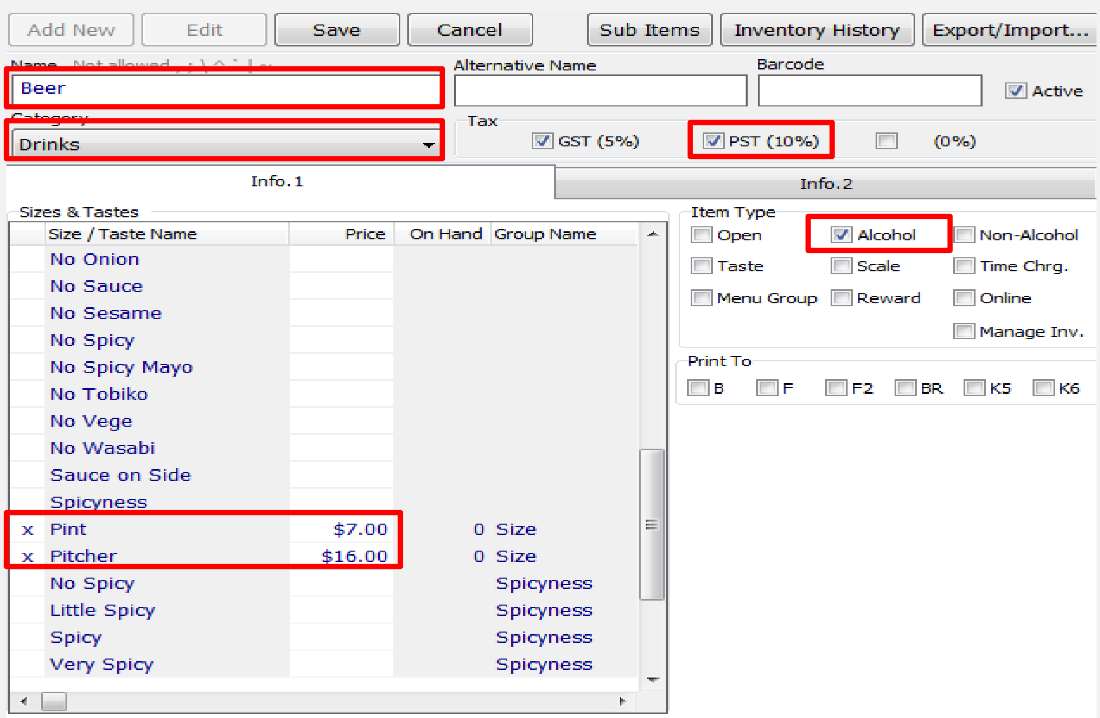
(“Ex Sauce” in above screen is taste option that was already made as section 6.b.)

d. Adding Alcohols



Unlike any other menu items, when you are creating alcohol items, you must check “PST” box manually. You also have to check “Alcohol” option in item type option (refer 6.c.). Other than this, adding alcohol items are exactly the same as adding menu items.

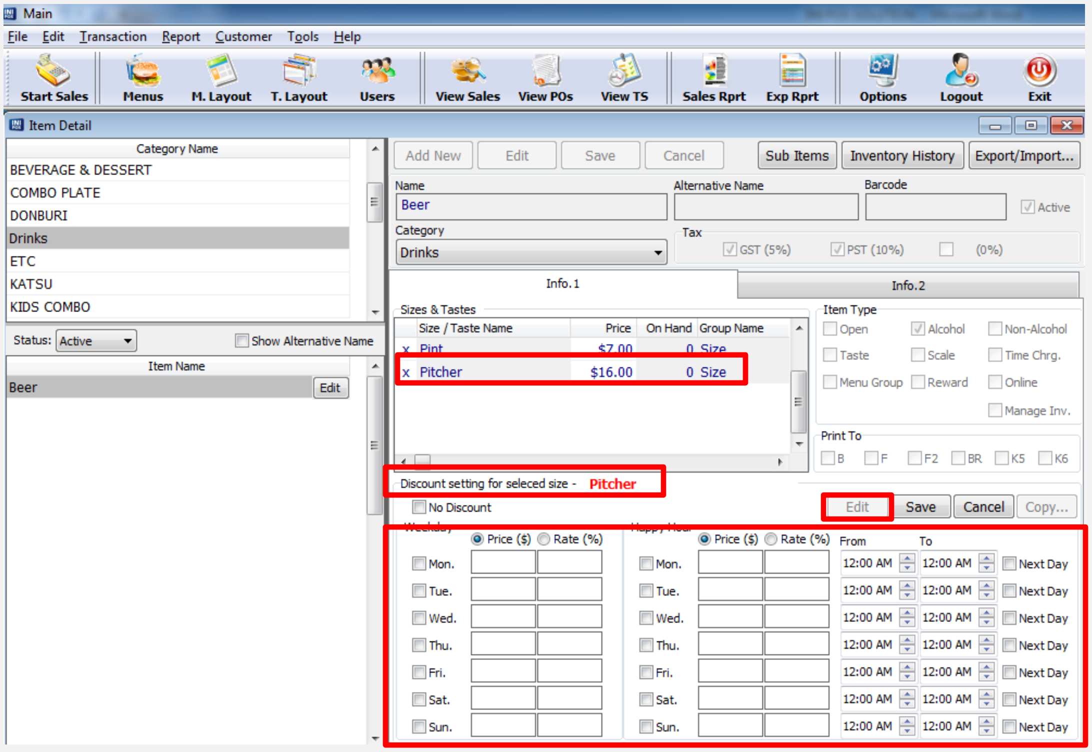
- Enter desired name for alcohol items
- Choose right categories (Ex: Liquor or drink)
- Choose size/taste option if necessary (Ex: Pint or Pitcher)
- Check PST box
- Check Alcohol in item type option
- Press Save button



e. Discounts (Permanent)

This feature is for creating regular, re-occurring discounts for specific items; once these automatic discount times are set and applied, the POS will automatically apply discounts appropriately until an administrator modifies the settings again.

Each item's automatic discounts must be individually configured.

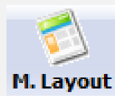


- First, press  button and select the desired item found along the top bar of the Back office
- If the target item has multiple sizes/taste options, left click the "size" of the item to which the discount will be applied. Note that in the above screen, "Pitcher" has been targeted for a discount, as indicated in red box.
- Press "Edit"
- If you wish to set discount for the entire day, choose any days on "Weekday" section
- If you wish to set discount for specific time range, use "Happy Hour" section
- You may choose either Price ($) or Rate (%) discounts
- Press Save button

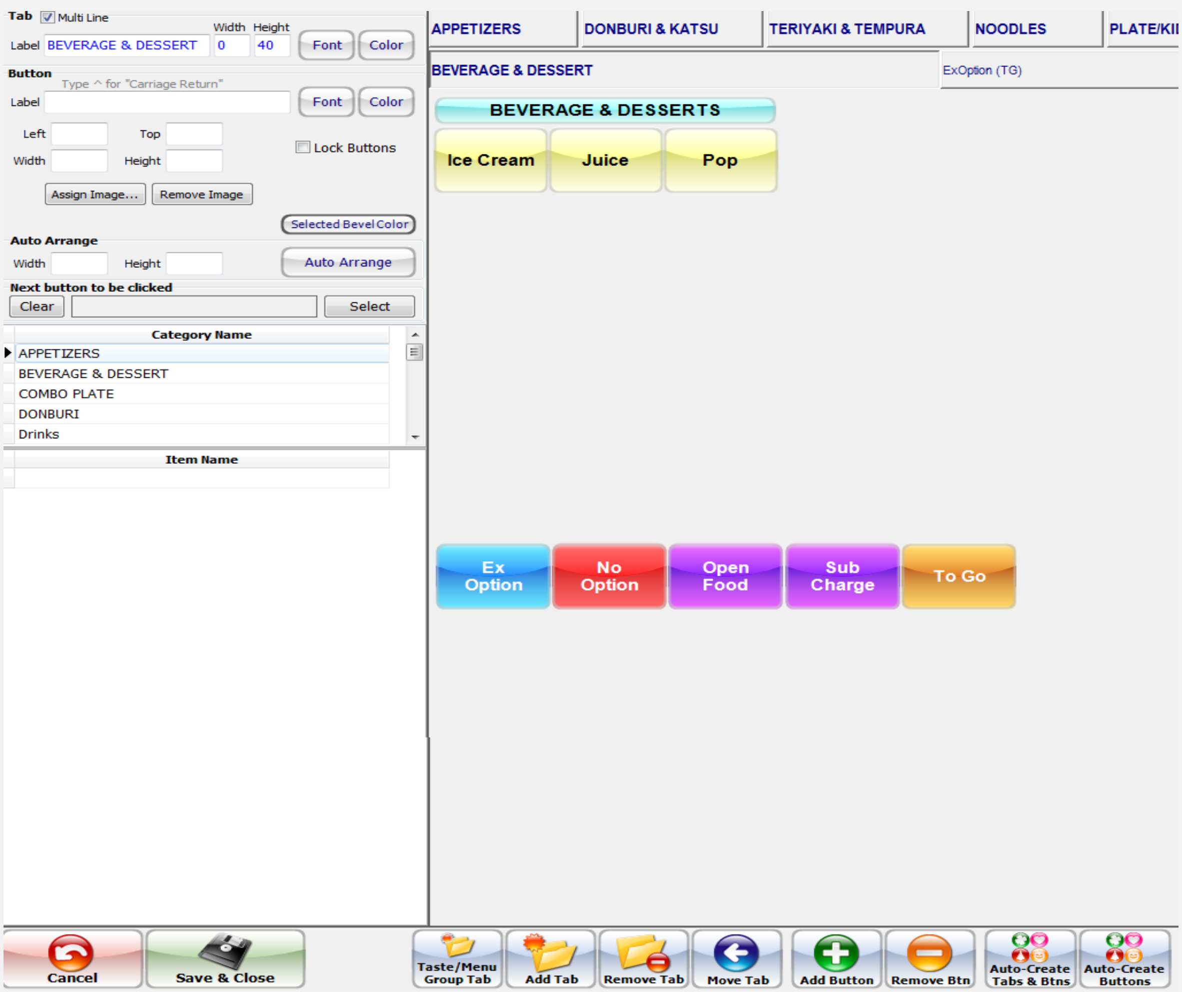
7. How to use Menu Lay-out

Menu Layout function adjusts how your menu buttons are going to be organized and appear in the Sales interface.

To begin, click the M.Layout button along the top bar of the Back Office to bring up the Menu Layout interface:

You will see the following screen if you press 

button



(Menu Layout above is just an example; you will have blank pages with no categories and buttons)

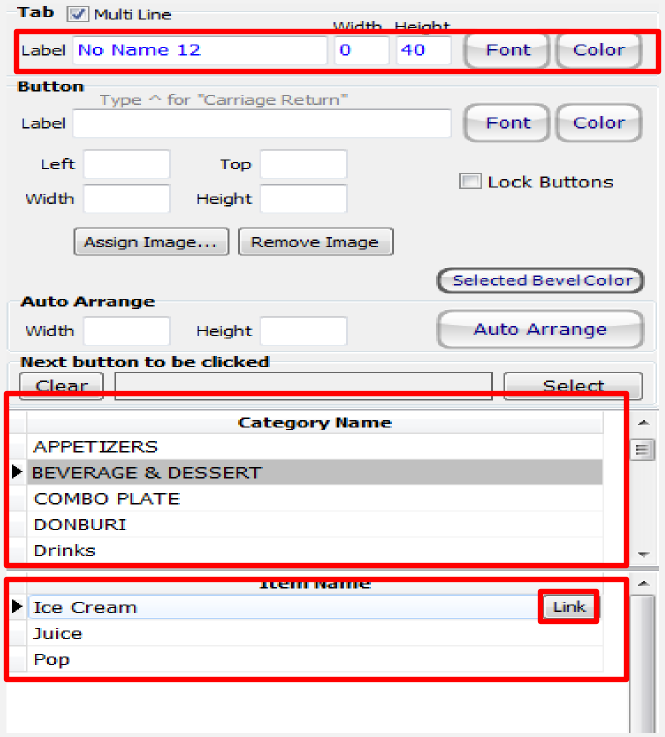
a. How to add/delete menu item buttons

First of all, you must put right menu items into right categories. For example, if you wish to create drink and ice cream item buttons, categories must be created theretofore. In the screen above, Ice cream, Juice, Pop are in Beverage & Dessert category.

Let's assume you wish to create same menu layout as above:

- First create category by pressing 

button. Then, it will create tab on top of your screen.
- Name your category (Ex: Beverage & Dessert)



You may enter your category name in label section. Also, font and color may be changed as desired.

As mentioned earlier, these categories and items in red box are just examples that are made before in section 6.

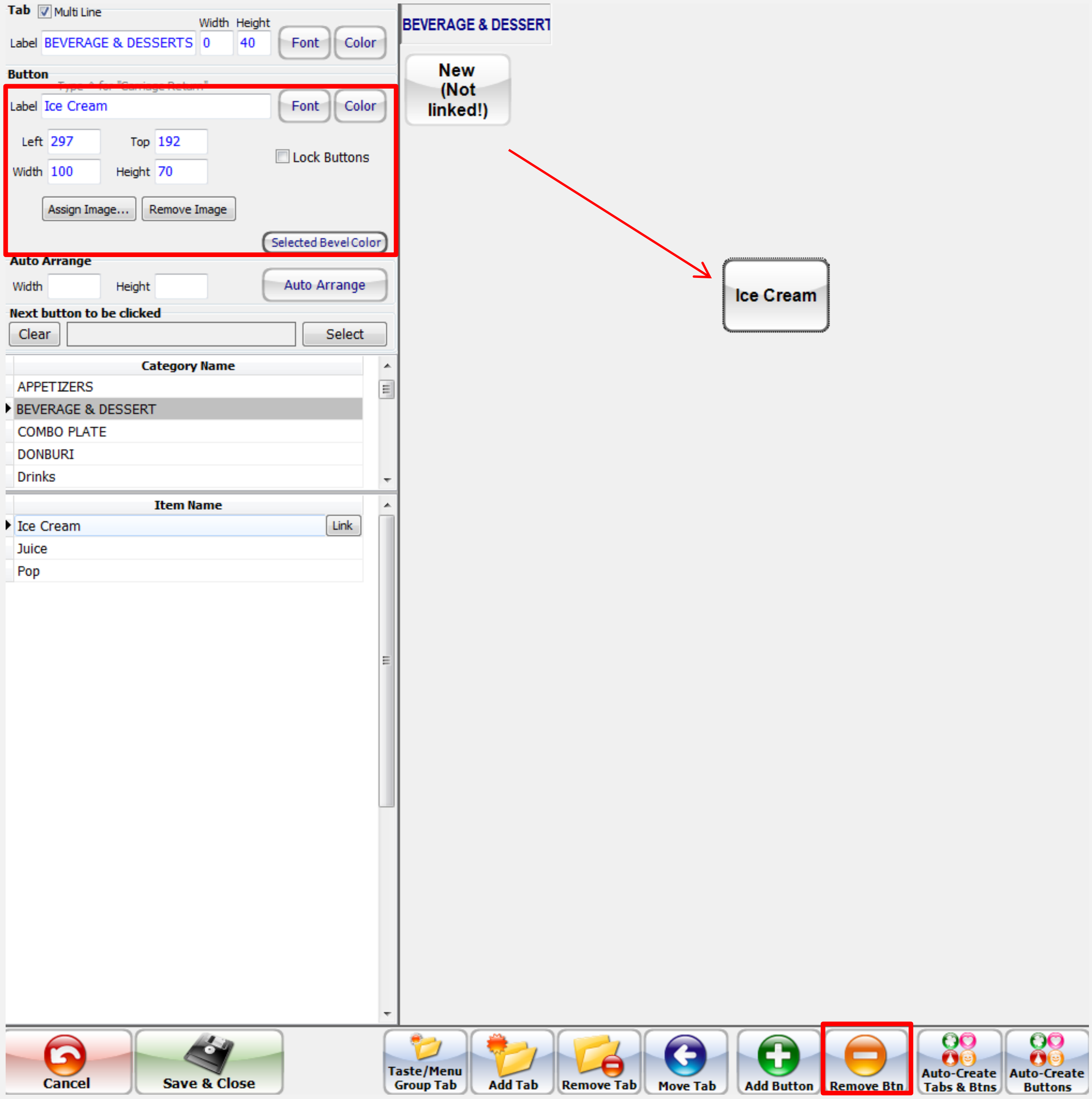
Categories and menu items you added in section 6 will be shown just like the ones in the left screen.

- After categories are created, press 

button located at bottom side of the screen
- You will see "New (Not Linked!)" button created
- Select desired category and item from the category/menu list above (Ex: Beverage & Dessert and Ice cream)
- Click "Link" button
- Your button is now linked to your desired item
- Link Juice and pop from beverage & dessert category by pressing 

button

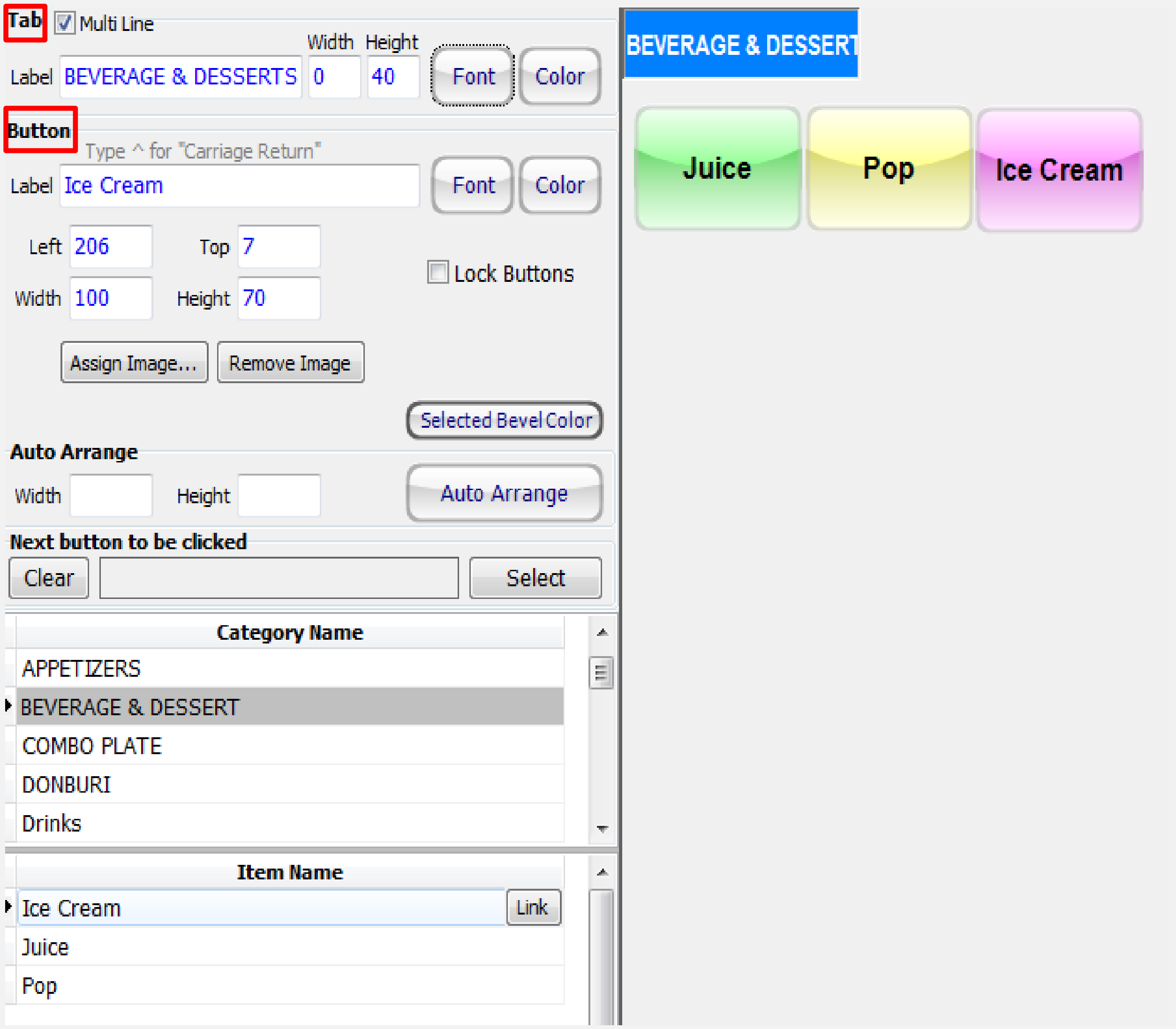
- You may adjust size of the button by entering numeric numbers into left, top, wide, height section shown in the screen below
- If you wish to move your created button to different location on the screen, click button and drag it to wherever you want with mouse
- Click “Save & close” button



- If you wish you delete the menu button, press 

located at bottom row.

b. Aligning buttons, changing fonts, colors and sizes



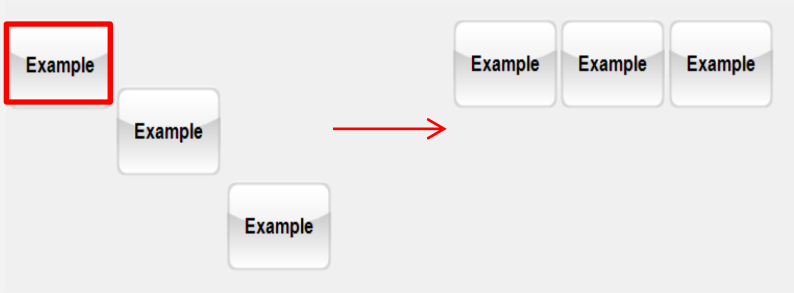
You may adjust color and font for categories in Tab Section and Button section for item buttons. In order to change the item button size, drag the corner of the button with your mouse. You may also enter numeric amount into Left, Top, Width and Height at Button section.

To arrange item buttons:

- Please drag all item buttons you wish to arrange
- Then, choose the "Target button" by left clicking it with your mouse
- Right click the target button with your mouse then press "Align top" or "Align Left" (Arranging buttons will be explained in more detail next page)

This is the screen you will see if you right click the target button. All the dragged item buttons may be aligned horizontally (align top) and vertically (align left) and sized into same width, height or size.

To align two or more buttons (top/left) or make them same size, drag all item buttons, then, select the "target" button by left clicking it once. The other buttons to be selected later will align to the target button.

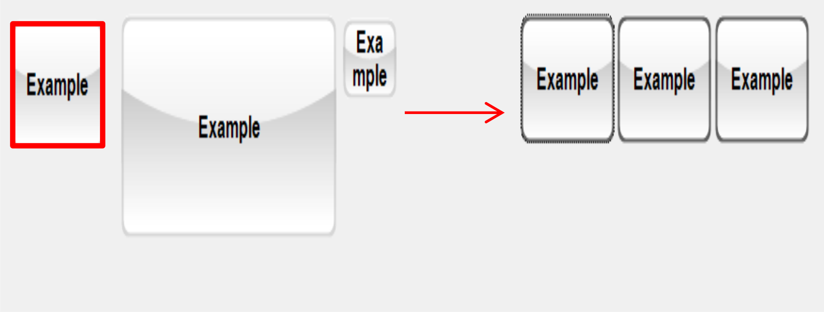


Align top:

3 original buttons are aligned top. Button inside the red box is the target button

Align left:

3 original buttons are aligned left.



Same size:

3 different sized buttons are changed into same size.

To select buttons you may also use "shift" key. Left click the buttons while holding shift key. Release shift key, then, right click on the target button.

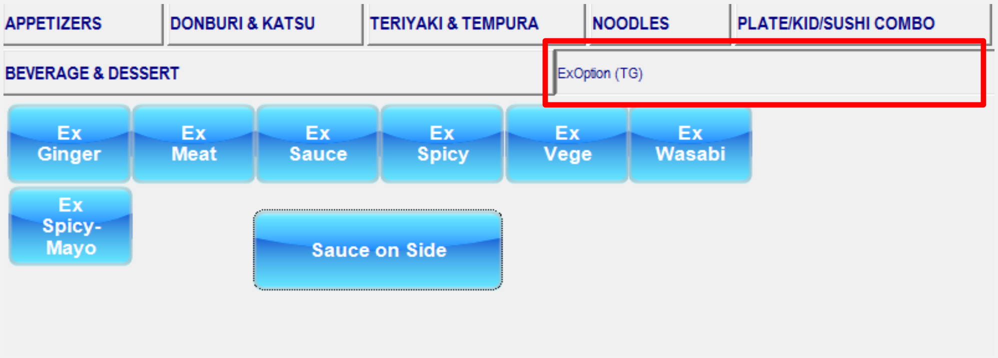
c. Taste button layout

It is possible to create a pop-up menu that contains a multitude of taste-modifiers.

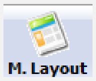
In this example, an “Ex Option” taste option leads to more detailed choices.

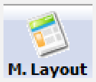
To create this Taste-option menu, follow these steps:

- Add a new item into the menu, as detailed in section 6.c.
- Choose desired size/taste options in Size & Taste section
- Check the “Taste” box during the steps outlined in section 6.c.
- Add the new item into the Menu Layout (refer section 7.b.)
- Left click the Taste Option button in the Menu Layout
- Click “Taste/Menu Group Tab” button along the bottom row
- This creates a new tab, named after the button. In out example, it would be named “Ex Option (TG).” TG stands for “Taste Group.”
- Save and exit the Menu Layout



d. Automatic generation

Automatic generation function is very useful when you wish to add many items into menu layout at once. All the menu items (refer section 6.c.) and categories (refer section 6.a.) you created before are automatically generated in 

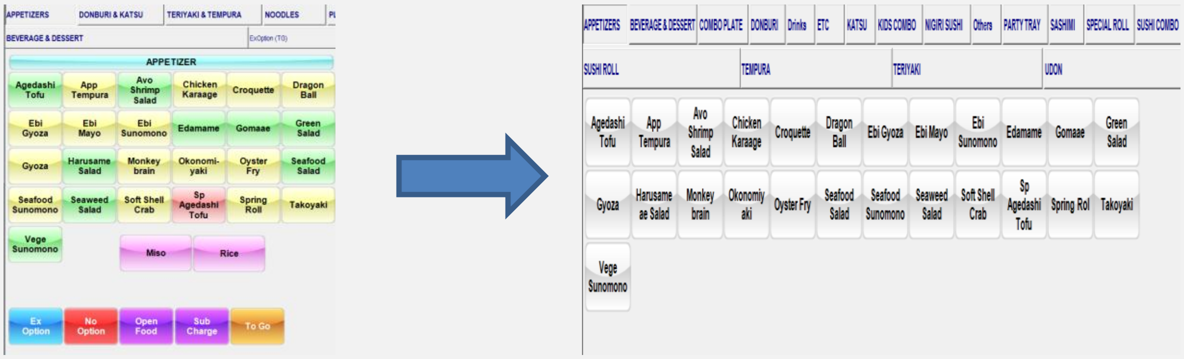
in alphabetical order. Menu items are added one by one in section 6.c. and it will take a long time to add a lot of menu items this way. Moreover, these added menu items have to be manually added to 

by pressing 

button all the time (as well as linking).

This is when you should use an automatic generation function. It allows you to add menu items more quickly and easily. One thing you must be aware when using this function is that all the category and menu item features (categories, menu items, color, font, alignment, etc) already added in M.Layout before using automatic generation will disappear. For instance, please refer two images below (they both contain same categories and menu items). Left image has all menu items aligned and adjusted. If you press 

located in bottom row at this state, all the setting will be gone and then your menu layout will be newly re-generated just like second image.



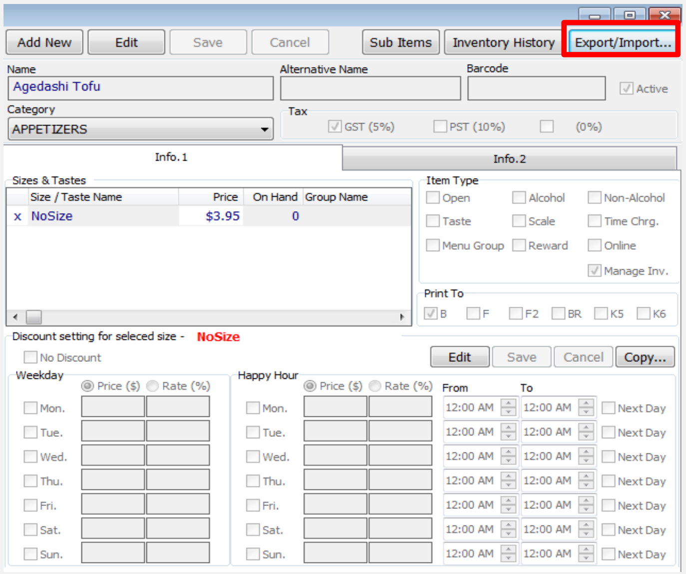
As this feature completely overrides the existing menu layout, 

functions must only be utilized during first-time setup, when working with a blank slate.

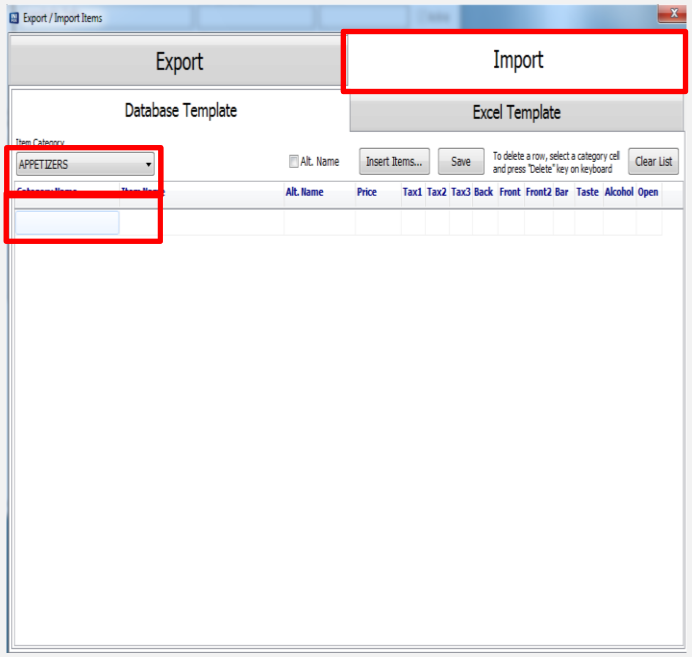
button allows you to generate all the categories and menu items into M.layout whereas 

button only allows you to generate menu items.

How to use Automatic generation function:



The following screen will appear when you press  button. Press "Export/Import Items" button indicated by red box.

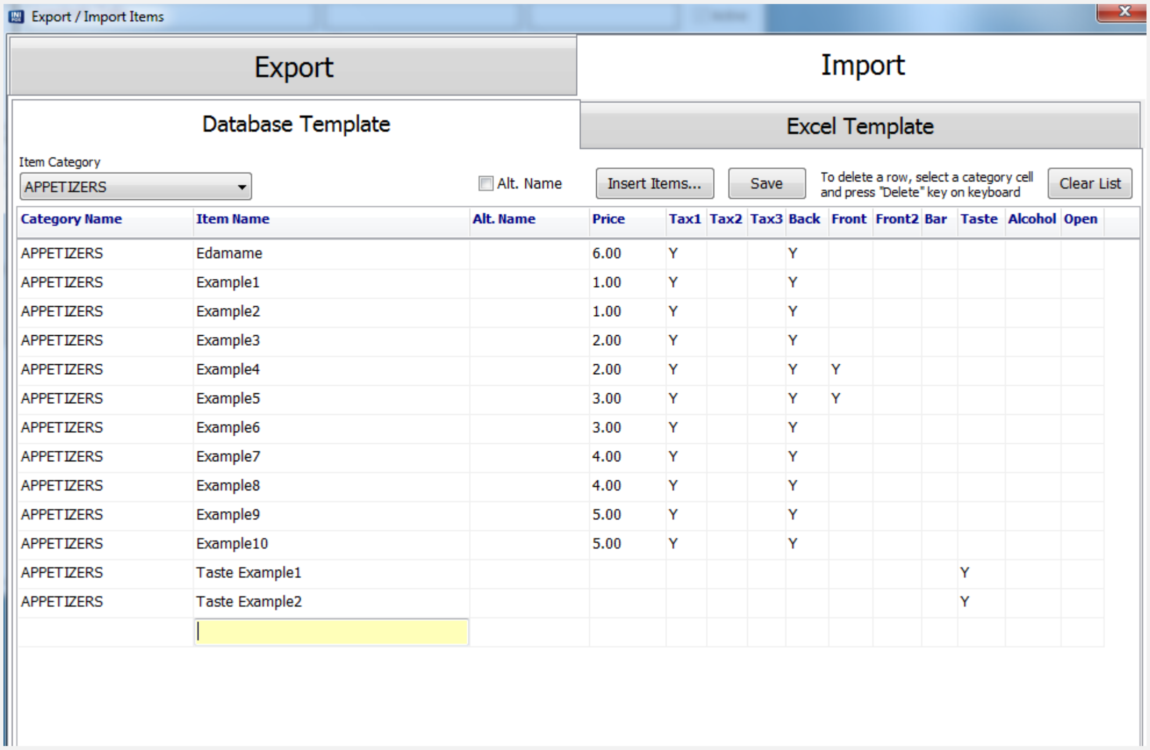


Press "Import" located at right top corner. Then the following screen will appear.

First, select desired category from the category section.

Then, select the same category just below the category section

Insert any desired item name in Item name section.



Category Name	Item Name	Alt. Name	Price	Tax1	Tax2	Tax3	Back	Front	Front2	Bar	Taste	Alcohol	Open
APPETIZERS	Edamame		6.00	Y			Y						
APPETIZERS	Example1		1.00	Y			Y						
APPETIZERS	Example2		1.00	Y			Y						
APPETIZERS	Example3		2.00	Y			Y						
APPETIZERS	Example4		2.00	Y			Y	Y					
APPETIZERS	Example5		3.00	Y			Y	Y					
APPETIZERS	Example6		3.00	Y			Y						
APPETIZERS	Example7		4.00	Y			Y						
APPETIZERS	Example8		4.00	Y			Y						
APPETIZERS	Example9		5.00	Y			Y						
APPETIZERS	Example10		5.00	Y			Y						
APPETIZERS	Taste Example1										Y		
APPETIZERS	Taste Example2										Y		

Insert item menus as much as you want just like the image above. Unlike the way for adding menu items in 6.c., you should be aware that you have to check GST (Tax1) manually by entering Y. Moreover, PST (Tax2) should be checked manually if required (Ex: Alcohol). Back/Front mean back/front prints. Make sure you check all the required options (Tax, printer, taste, alcohol, or open) according to the menu times. Then, press “Insert Items” button.

After inserting all the menu items into appropriate categories, you may now use 

functions and then adjust/align all the buttons and categories generated.

8. Table Layout

Using Table Layout feature is basically the same as using Menu Layout. Your table layout will be created based on your restaurant table arrangements and numbers.

Press 

located at top in Back Office interface. Then the following screen will appear.

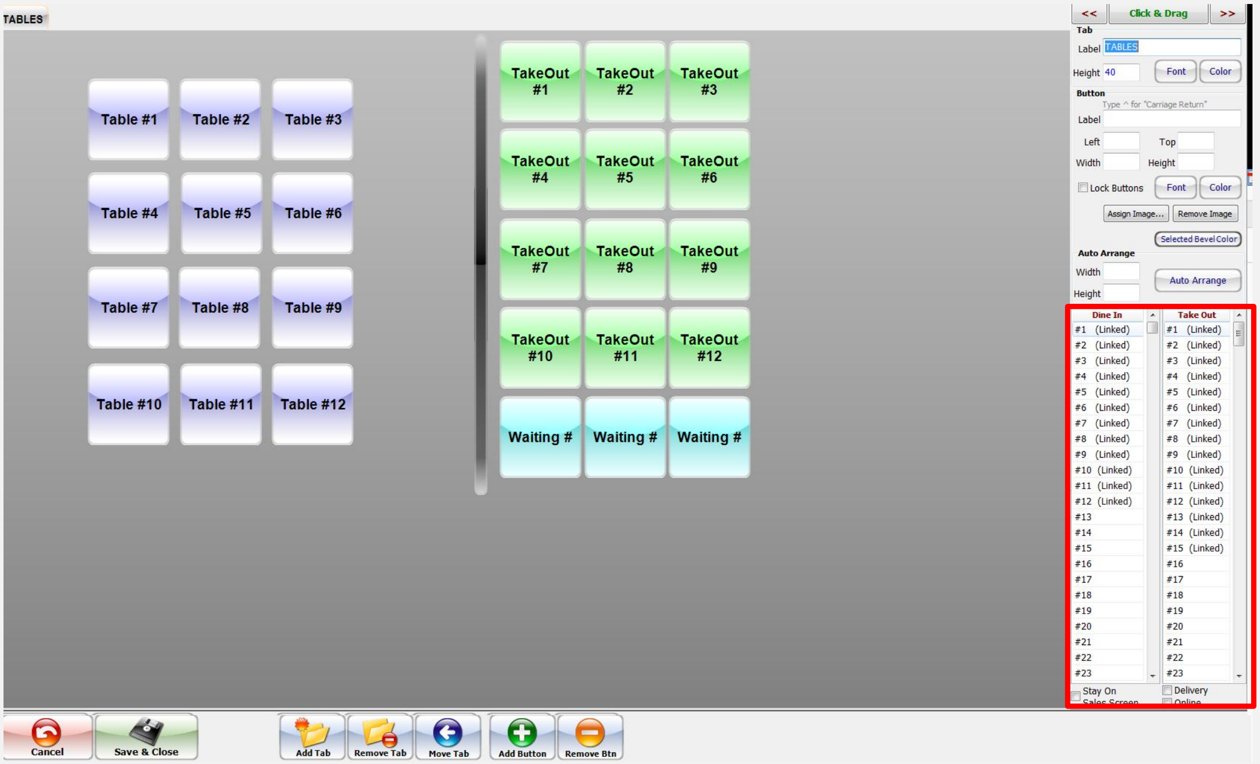


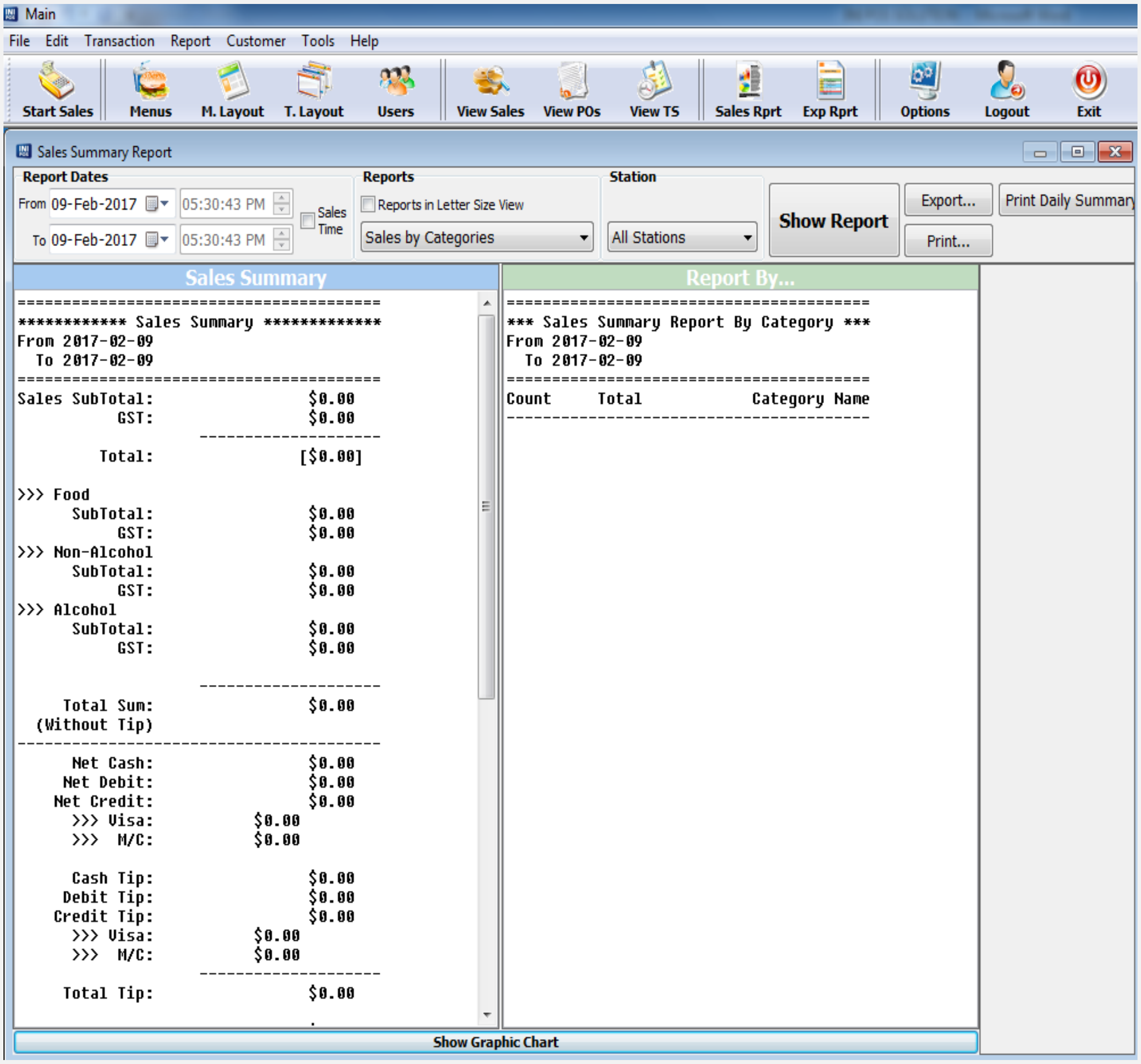
Table layout above is non-edited original layout. You will get to edit/arrange the layout based on your restaurant table arrangements and numbers.

- From above screen, “Table”, “Takeout” and “Waiting” buttons are all located in the same screen. If you wish to put them in different tab, you may do so by creating new tab (category).
- Press “Add Tab” button and create category as you desire (Ex: Table, dine-in or take-out)
- Press “Add Button” and create as much as buttons you need
- All the buttons created must be linked to appropriately. If you wish to create “Dine-in” button, link to dine in by double clicking “Dine In #” located at right bottom on the screen. If you wish to create “Take out” buttons, link newly created buttons by double clicking “Take out #.”
- Now you may arrange all the buttons as you desire (refer section 7.a. and 7.b.)
- Press Save & Close button

9. Sales Reports

The following screen will appear when you press 

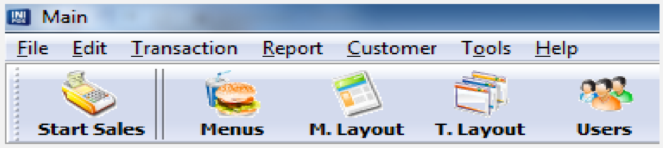
button from the top bar of the Back Office interface. From “Report Dates” section located in left corner (indicated by red box), you may select date ranges that will sum up your sales reports from certain time to another. When you entered specific time range, press “Show Report.”

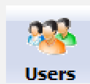


You may print your sales reports by press “Print” button located in top right bar (indicated by red box). Moreover, you may export your sales report data into Excel or Text files by pressing “Export” button above the “Print” button.

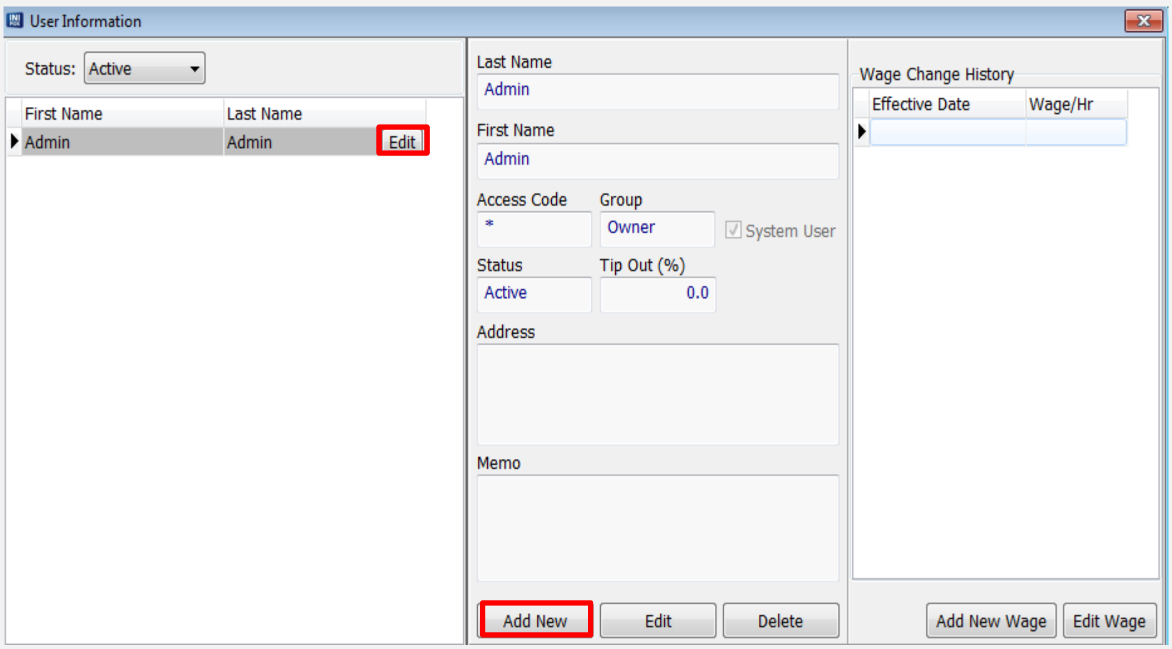
If you wish to export your data into Excel file, select CSV or Text file for notepad format.

10. Users- creating and modifying

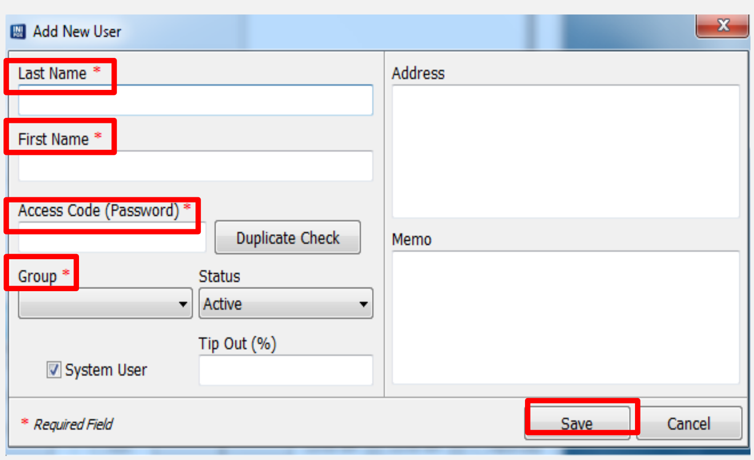


To modify or create users, click 

button along the top bar in the Back Office interface. This brings up the “User Information” window:



Click “Add New” to create a new user, or click an existing user and click “Edit” to make modifications.



The following screen will appear when you press “Add New” button. Enter appropriate information.

You must fill up information where * is presented

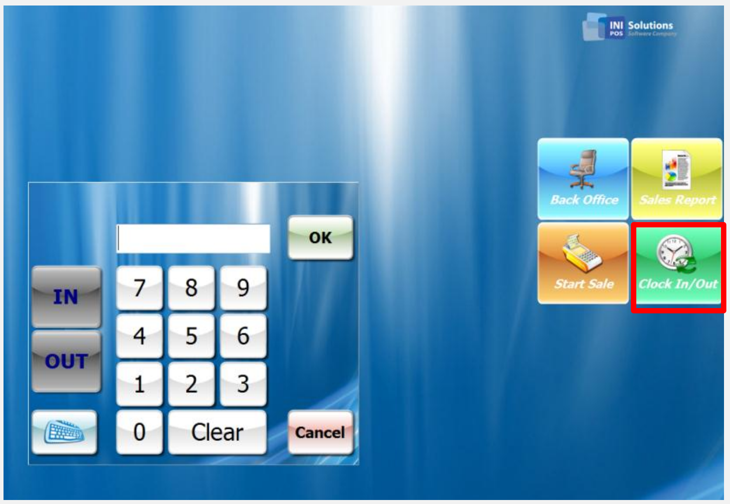
(Users must have their own Access Code)

11. How to use Time Stamp function

Only users registered in the POS Database can utilize this feature. For more information on creating users, please see the previous section.

This function allows users to easily calculate their working hour times from the time they clock in to clock out.

The Time Stamp Utility is found on the Home Page interface:



Press 

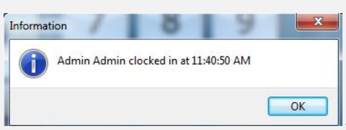
button in main interface.

Enter your own access code (refer section 10) and press OK button.

How to Clock in:

After entering your access code, “In” button will turn into red (if you haven’t clocked in yet). Press 

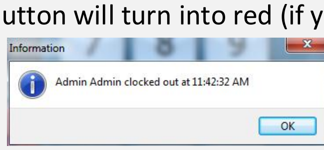
button. The following screen will appear with the time that users clocked in,



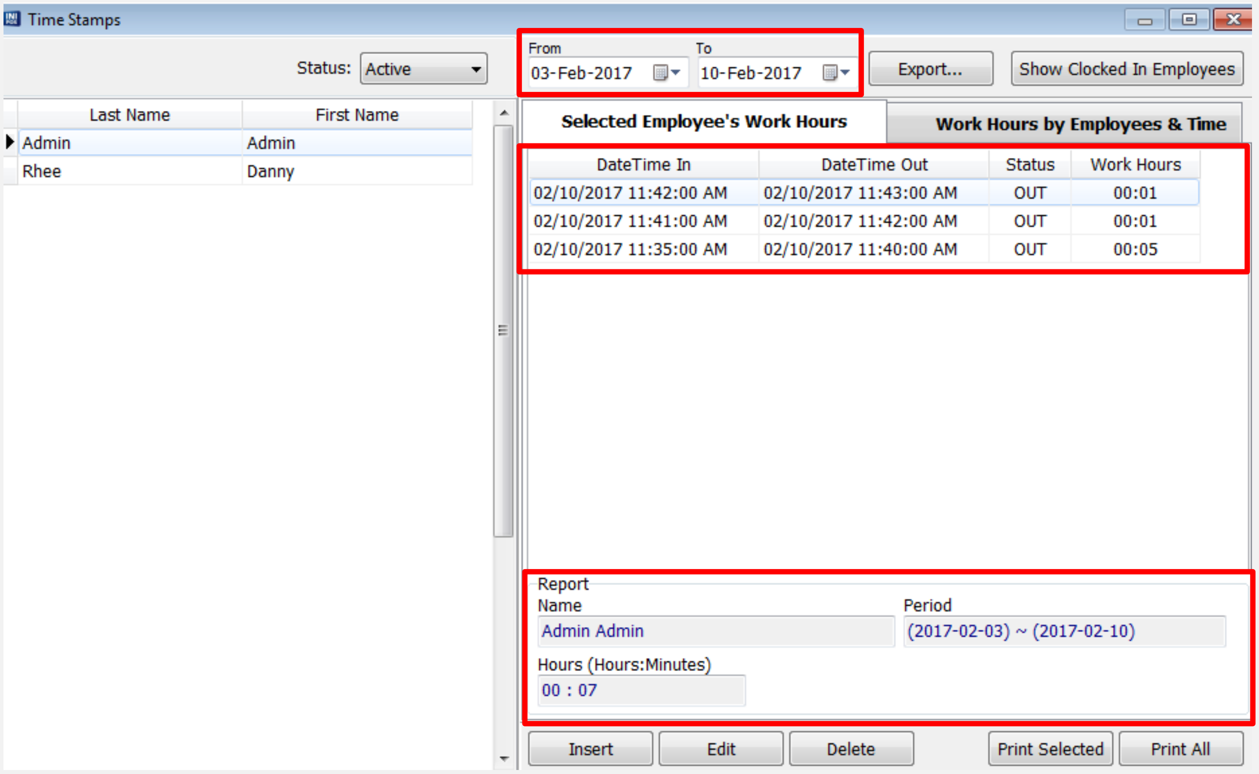
. Press OK. Then, you are now clocked in.

How to Clock out:

After entering your access code, “Out” button will turn into red (if you have clocked in earlier). Press 

button. Press OK button when 

appears.



You will see above screen when you press 

button in Back Office interface. You may see specific user's time stamp on certain time range.

12. Customer History

The list of useful information accumulates naturally in the process of take-out orders, as servers take in customers' names, phone numbers, and even addresses for delivery orders.

This data is useful for planning purposes (alongside the Sales Reports) to determine the direction of your restaurant and also to help returning customer's identify "that delicious dinner I had few days ago."

Customer history can be access from both the Sales Interface and the Back Office.

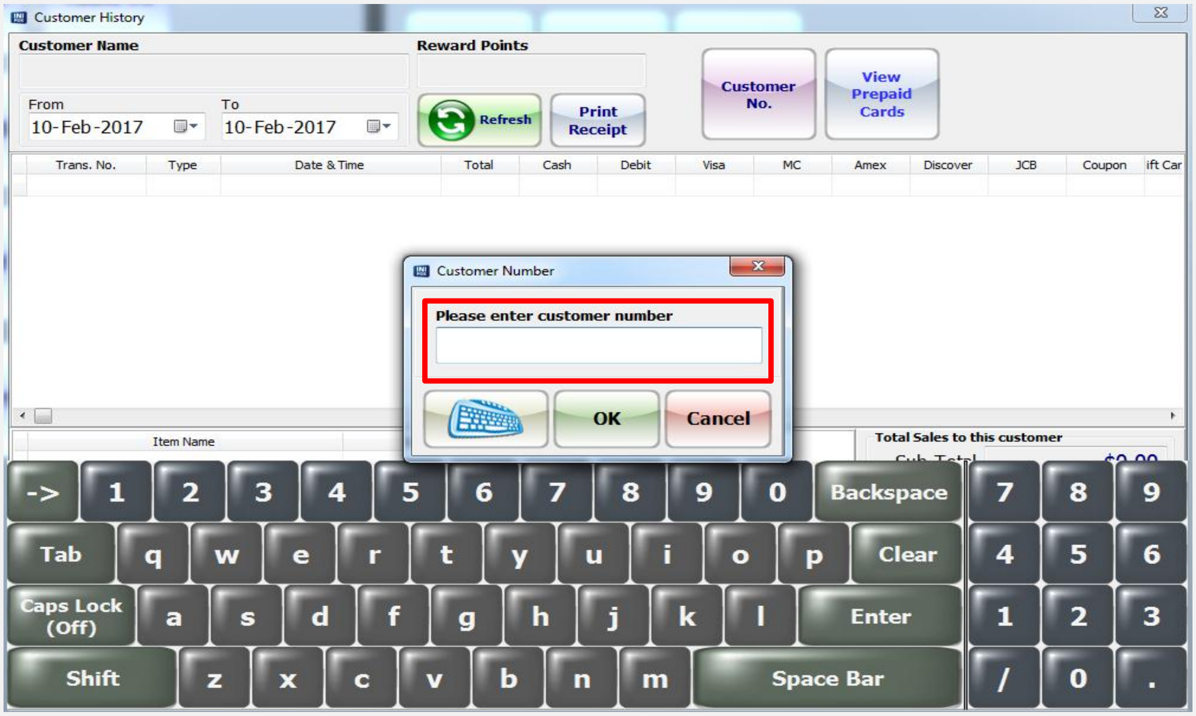
a. To access from the Sales Interface:

Press 

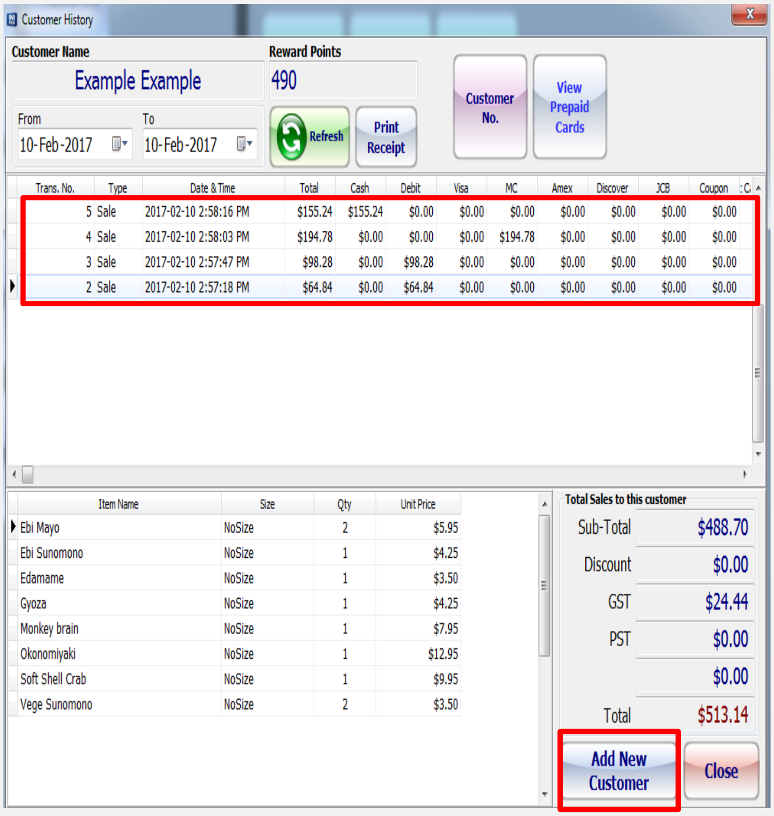
button located at bottom row,

then, press 

button

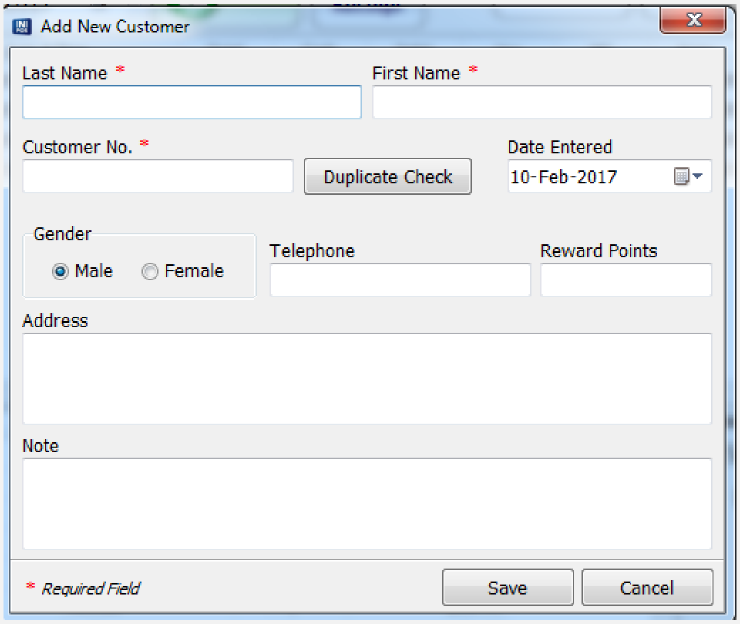


Above screen will appear and you will be asked to enter customer number. If the customer number is known (not often known) enter it in the dialogue window. If not, press cancel button and search for their name. Adjust the time range as required.



If you wish to see certain customer's purchase history, enter the appropriate customer number (Ex: 007). Then, the history will appear.

If you wish to add new customer information press the "Add New Customer" button located in right bottom corner.



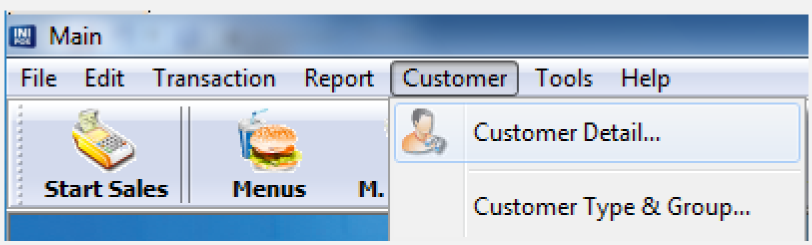
The following screen will appear when you press “Add New Customer” button.

Enter name and customer number.

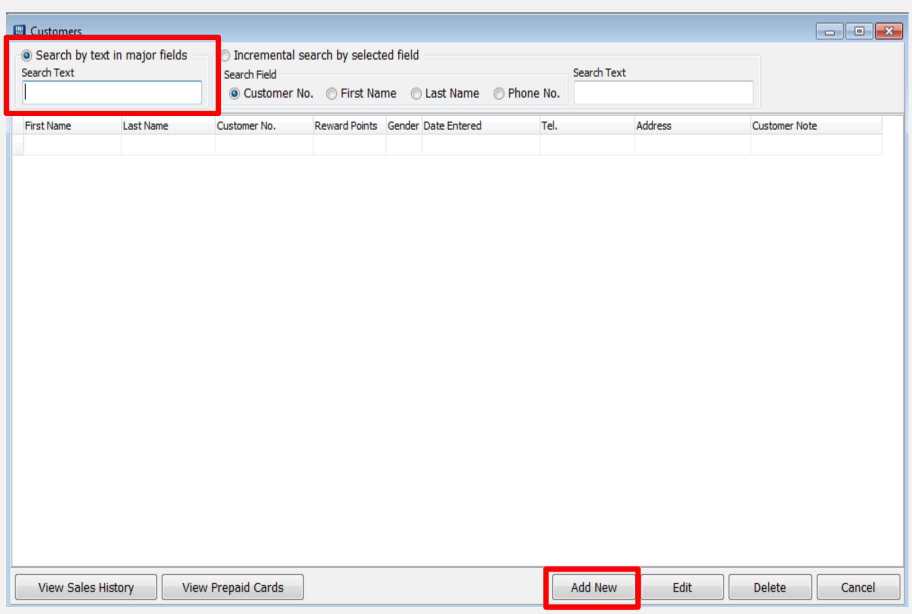
(Customer number is cannot be overlapped)

Please press “Save” button.

b. To access from the Back Office Interface:

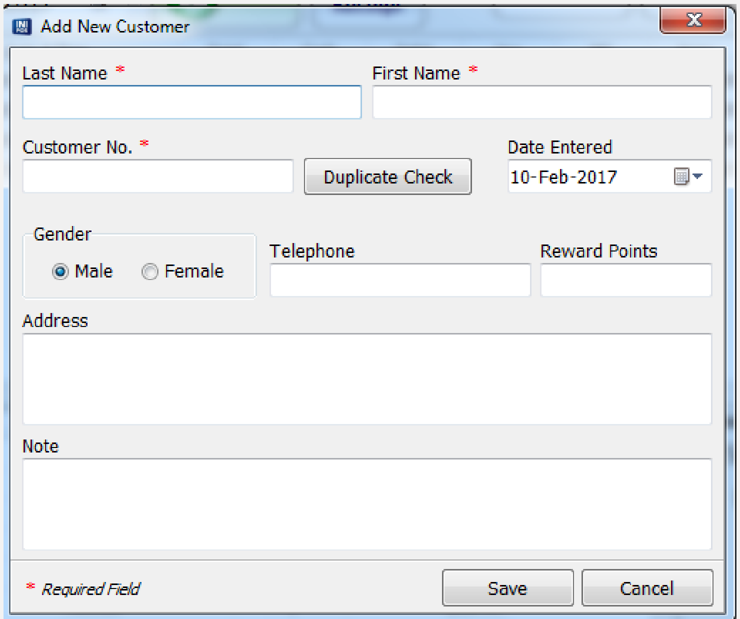


First, enter “Customer” located at very top of the Back office interface. Then, press “Customer Detail.”



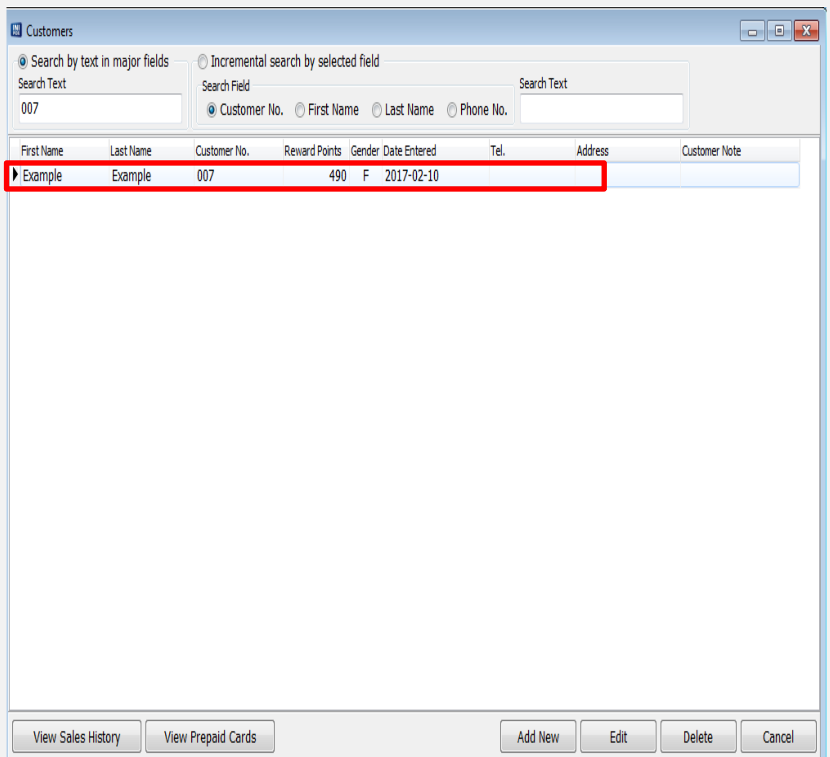
The following screen will appear. If you wish to add customer information, enter “Add New” button.

If you wish to see certain customer’s information, enter appropriate customer number in the Search Text section located in left top corner.



Adding customer information in Back office interface is same as Sales interface.

Enter customer's information and then press OK button.



If you wish to see customer's purchase history, enter appropriate customer number.

Then, customer information will appear in the list.

Double click or enter "View Sales History" button.