

INI POS SOLUTION

INI POS (RETAIL) USER MANUAL

ver.16.04.21.en

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Table of Contents

- 1. Getting Started
- 2. How to perform sale
 - a) Log-in to sales screen
 - b) Perform sale and process payments
 - c) Adjust quantity
 - d) Delete item
 - e) Hold & recall
 - f) Cash back
 - g) Open menu sale
 - h) Lottery sale & payout
 - i) Non-barcode product sale
 - j) Etc.
- 3. Manage your items
 - a) Register & modify items
 - b) Create buttons

***Attachment; Appendix A (Advanced User Guide)**

1. Getting Started

Welcome to INI's Point of Sale system. This document may provides simple & easy instructions for your use of our software, and troubleshooting solutions and tips.

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 main interface. You may see this screen upon your launch of the program.

Back Office:



This button leads you to administrative interface where you can edit or modify your existing menu and add new items, maintain user accounts. You may also view or print sales report in this feature.

An administrator's password is required to log-in to "Back Office".

Start Sale:



This button leads you to the main POS interface where you may make sales and process payments.

Sales Report:



An administrative feature, this button allows you to view, print, or export to MS Excel, the company's sales data. An administrator's password is required to use this feature.

Clock In/Out:



This utility allows your POS station to double as a timestamp for employees.

2. How to perform sale

a) Log-in to sale screen



Press Start Sale. You may be prompted to log-in.


Enter the password then click or tap on the blue arrow button.

b) Perform sale and process payments



This is the main Sales Interface. To perform sale, start scanning items with the scanner.

Then press  Debit for debit card payments

or  Credit for credit card payments.

For cash payments you may enter numeric amount of the cash bills that customer paid,

then press  Cash to proceed payments.

c) Adjust quantity

Item Description	Qty/Weight	Unit P.	Ext. P.	Tax #
Extra Toppings	-4	\$0.35	-\$1.40	2
Extra Toppings	5	\$0.35	\$1.75	1

Total	\$0.35
Paid	\$0.00
Due	\$0.35

Sub Total	\$0.35	GST (5%)	\$0.00	PST (7%)	\$0.00
-----------	--------	----------	--------	----------	--------

7

8

9

+

-

4

5

6

Enter

Debit

1

2

3

↺

Credit

0

00

.

CLR

Cash


\$1


\$5

\$10

\$20

DEL

To scan more than one of the same items at once, enter quantity and press  button, and then scan the item.

If you want to reduce the quantity, enter quantity and press  button. Then scan the item.

d) Delete Item

Item Description	Qty/Weight	Unit P.	Ext. P.	Tax #
SM Hard Cone	1	\$2.10	\$2.10	5
LG Soft Cone	1	\$2.65	\$2.65	4
SM Soft Cone	1	\$1.85	\$1.85	3
Extra Toppings	1	\$0.35	\$0.35	2
Extra Toppings	1	\$0.35	\$0.35	1

Total	\$7.30
Paid	\$0.00
Due	\$7.30

Sub Total	\$7.30
-----------	--------

7

8

9

+

-

4

5

6

Enter

Debit

1

2

3

↺

Credit

0

00

.

CLR

Cash

\$8

\$5

\$10

\$20


DEL


Item List # to Remove


Please enter ITEM LIST #

5

OK

To delete items, press  button and select the number which indicates desired item.

*You may use  button to switch numbers.

*Once you switched number to the desired item's number, press  button.

e) Hold & Recall

You may hold the current transaction by pressing



button once,

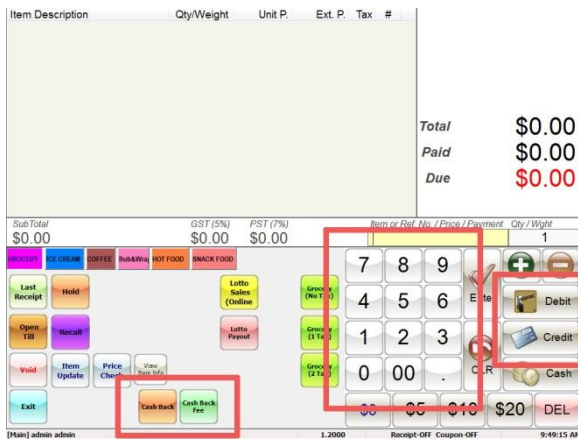
and you can proceed sale with another customer.

Once you complete the transaction, you can press



button to reload the transaction that you just held.

f) Cash back



To perform cash back function, enter dollar amount of the cash, then press



button.

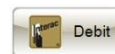
*Apply cash back fee(if applicable), enter dollar amount of the fee,



then press

button.

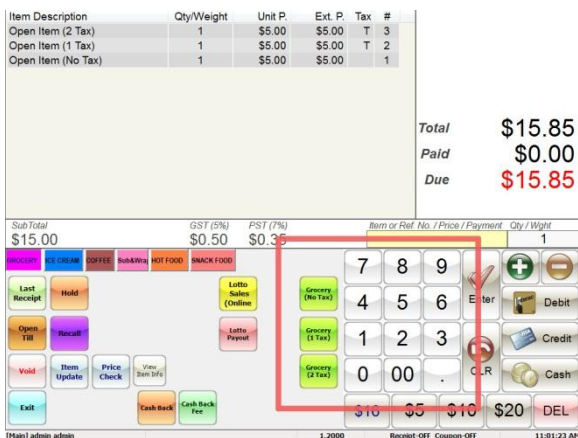
Press one of the following buttons to complete the transaction.



Or



g) Open item sale



To perform open item sale, enter dollar amount of the product,

then press



button for non-tax items,

button for GST applicable items,



and



for both of GST and PST applicable items.

h) Lottery sale & payout

Item Description	Qty/Weight	Unit P.	Ext. P.	Tax #
Lotto Payout	-1	\$5.00	-\$5.00	2
Lotto Online	1	\$5.00	\$5.00	1

Total	\$0.00
Paid	\$0.00
Due	\$0.00

Sub Total	\$0.00	GST (5%)	\$0.00	PST (7%)	\$0.00
-----------	--------	----------	--------	----------	--------


Item or Ref. No.	Price / Payment	Qty / Weight
1		1

7	8	9	✓	+	-
4	5	6	Enter	Debit	
1	2	3		Credit	
0	00	.	CLR	Cash	
\$0	\$5	\$10	\$20	DEL	


Menu	GROCE	ICE CREAM	COFFEE	SUB&WRAP	HOT FOOD	SNACK FOOD
Last Receipt	Hold					
Open Till	Receipt					
Void	Item Update	Price Check	View Item Info			
Exit						
	Cash Back	Cash Back Fee				

[Main] admin admin 1.2008 Receipt OFF Coupon OFF 11:28:50 AM

To perform online lottery sale, enter dollar amount and

press  button.

To perform online lottery payout, enter dollar amount and

press  button.

i) Non-barcode product sale

Item Description	Qty/Weight	Unit P.	Ext. P.	Tax #
Lotto Payout	-1	\$5.00	-\$5.00	2
Lotto Online	1	\$5.00	\$5.00	1

Total	\$0.00
Paid	\$0.00
Due	\$0.00

Sub Total	\$0.00	GST (5%)	\$0.00	PST (7%)	\$0.00
-----------	--------	----------	--------	----------	--------

Item or Ref. No.	Price / Payment	Qty / Weight
1		1

Menu	GROCE	ICE CREAM	COFFEE	SUB&WRAP	HOT FOOD	SNACK FOOD
Last Receipt	Hold					
Open Till	Receipt					
Void	Item Update	Price Check	View Item Info			
Exit						
	Cash Back	Cash Back Fee				

[Main] admin admin 1.2008 Receipt OFF Coupon OFF 9:49:15 AM

Press one of the following buttons to switch tab, and move to the category where desired item is located.



Item Description	Qty/Weight	Unit P.	Ext. P.	Tax #																																																																		
<div style="float: right;"> Total \$0.00 Paid \$0.00 Due \$0.00 </div>																																																																						
<div style="display: flex; justify-content: space-between;"> <div> Sub Total \$0.00 GST (5%) \$0.00 PST (7%) \$0.00 </div> <div> Item or Ref. No. / Price / Payment Qty / Weight 1 </div> </div>																																																																						
<div style="display: flex;"> <div style="flex: 1;"> <table border="1"> <tr> <td>SM Soft Cone</td> <td>LG Soft Cone</td> <td>SM Hard Cone</td> <td>LG Hard Cone</td> <td>SM Dipped C</td> <td>LG Dipped C</td> <td>Soft Vanilla Cone</td> <td>Hard Vanilla Cone</td> <td>LG Ice Cream</td> </tr> <tr> <td>SM Sundae</td> <td>LG Sundae</td> <td>SM Hot Sundae</td> <td>LG Hot Sundae</td> <td>Parfait</td> <td>Natty Parfait</td> <td>SM Yogurt</td> <td>LG Yogurt</td> <td></td> </tr> <tr> <td>Banana Split</td> <td>Ice Cream Cake</td> <td>SM Shake</td> <td>LG Shake</td> <td>SM Twister</td> <td>LG Twister</td> <td>SM Popsicle</td> <td>LG Popsicle</td> <td></td> </tr> <tr> <td>SM Slush</td> <td>MD Slush</td> <td>LG Slush / SM Cone</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table> </div> <div style="flex: 1;"> <table border="1"> <tr> <td>7</td> <td>8</td> <td>9</td> <td>✓</td> <td>+</td> <td>-</td> </tr> <tr> <td>4</td> <td>5</td> <td>6</td> <td>Enter</td> <td>Debit</td> <td></td> </tr> <tr> <td>1</td> <td>2</td> <td>3</td> <td>↶</td> <td>Credit</td> <td></td> </tr> <tr> <td>0</td> <td>00</td> <td>.</td> <td>CLR</td> <td>Cash</td> <td></td> </tr> <tr> <td>\$0</td> <td>\$5</td> <td>\$10</td> <td>\$20</td> <td>DEL</td> <td></td> </tr> </table> </div> </div>					SM Soft Cone	LG Soft Cone	SM Hard Cone	LG Hard Cone	SM Dipped C	LG Dipped C	Soft Vanilla Cone	Hard Vanilla Cone	LG Ice Cream	SM Sundae	LG Sundae	SM Hot Sundae	LG Hot Sundae	Parfait	Natty Parfait	SM Yogurt	LG Yogurt		Banana Split	Ice Cream Cake	SM Shake	LG Shake	SM Twister	LG Twister	SM Popsicle	LG Popsicle		SM Slush	MD Slush	LG Slush / SM Cone							7	8	9	✓	+	-	4	5	6	Enter	Debit		1	2	3	↶	Credit		0	00	.	CLR	Cash		\$0	\$5	\$10	\$20	DEL	
SM Soft Cone	LG Soft Cone	SM Hard Cone	LG Hard Cone	SM Dipped C	LG Dipped C	Soft Vanilla Cone	Hard Vanilla Cone	LG Ice Cream																																																														
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1	2	3	↶	Credit																																																																		
0	00	.	CLR	Cash																																																																		
\$0	\$5	\$10	\$20	DEL																																																																		

[Main] admin admin 1.2000 Receipt Off Coupon Off 12:17:34 PM

Now you can proceed to sale with pre-made buttons that are linked to the products.

Just click or tap on desired items.

j) Etc.



Print receipt from previous transactions.

Use



button to indicate the transaction receipt to be printed.



Open cash register.

You will prompted to enter administrator password.



Void the current transaction.

You will prompted to enter administrator password.



Exit from sales interface.

You must complete the current transaction to exit.

3. Manage your items

a) Register & modify items

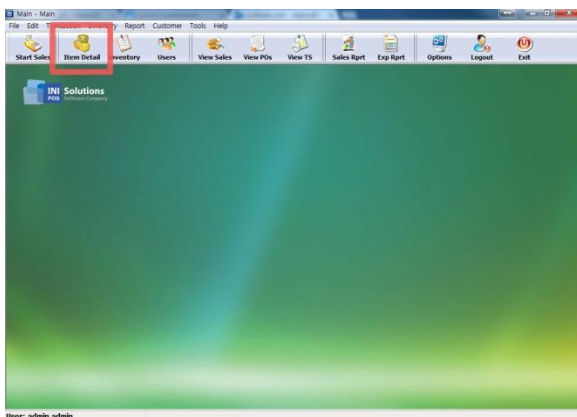


To register new items, press



button.

*You will prompted to enter administrator password.

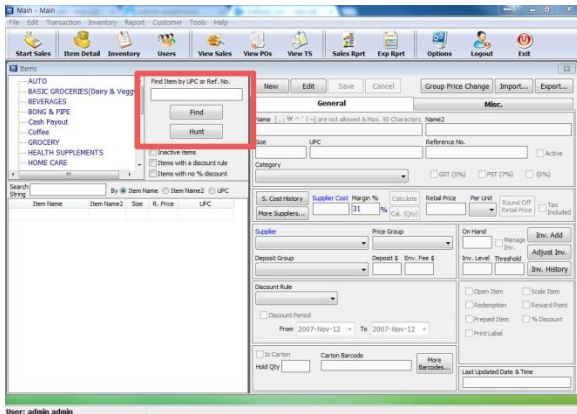


Once you log-in to Back Office interface,

press

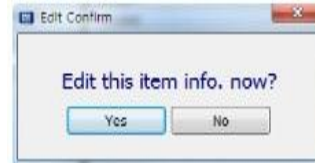


button.



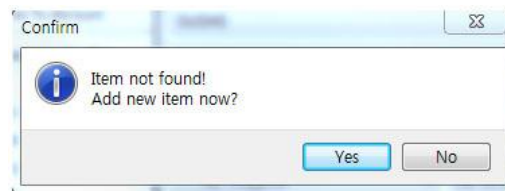
Scan your item and press **Find** button to check whether this item exist.

If the item is already existing in the system, you will see this...



Just press **Yes** button to modify item.

If the item doesn't exist in the system, you will see this message below



You can press **Yes** button to proceed registering item.

The screenshot shows the 'General' tab of the item registration form. The form is divided into two main sections: 'General' and 'Misc.'. The 'General' section contains fields for 'Name', 'Category', 'Supplier', 'Price Group', 'Deposit Group', 'Discount Rule', and 'Is Carton'. The 'Misc.' section contains fields for 'Reference No.', 'Active', 'GST', 'PST', 'Tax Included', 'Open Item', 'Scale Item', 'Redemption', 'Reward Point', 'Prepaid Item', and 'Print Label'. The form is annotated with numbered steps: 1. Enter name of the item (Name field), 2. Enter the price of the item (Retail Price field), and 3. Apply a bottle deposit (if applicable) (Deposit Group dropdown).

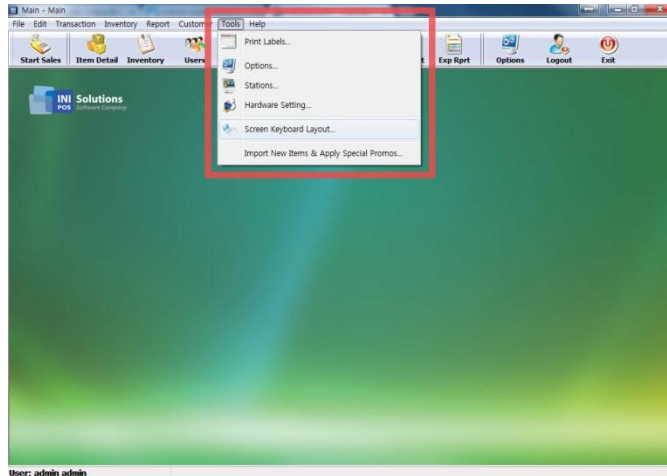
(1) Enter name of the item.

(2) Enter the price of the item

(3) Apply a bottle deposit (if applicable)

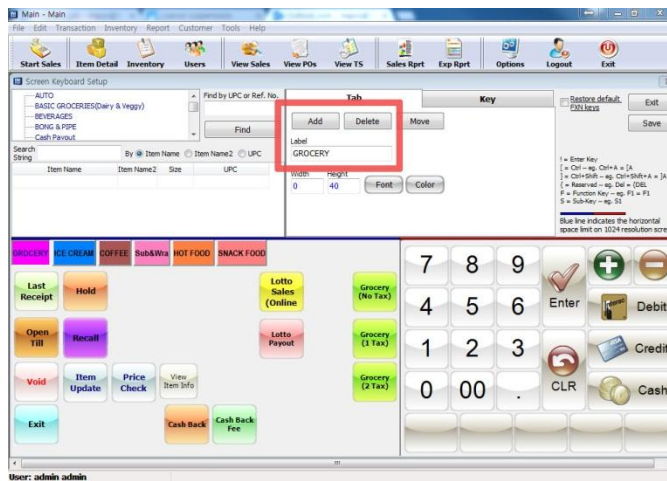
(4) Press **Save** button to save your item.

b) Create buttons



To create buttons, go to “Tools” tab and click “Screen Keyboard Layout”

*You must log-in to “Back Office” feature to perform this function.



You may add tabs prior to creating buttons.

To add a new tab press **Add** button, then type desired tab name in the “Label” section.

Once you created a tab, you can start creating buttons.

Press **Key** and press **Add**

button to create a new button, and find the items from the item list located at the left top section of the screen. (Choose category > item)

Then double click on the item to link to the button.

*You can drag and drop buttons to relocate.

When you are done press **Save** button to end the task.

Appendix A

Advanced User Guide

- **Item detail**
 1. **Create Category**
 2. **Setup discounts on items**
 - a) **On sale discount**
 - b) **Multiple discount**
 - c) **Volume discount**
 - d) **Limit discount**
 - e) **Setup Mix and Match (multiple discount)**
 3. **Setup supplier cost & Calculate margin**
 4. **Create a new bottle deposit group**
 5. **Options**
 - a) **Open item**
 - b) **Scale Item**
 - c) **Redemption**
 - d) **Reward Point**
 - e) **%Discount**
 - f) **Print Label**
 6. **Set group price for similar items**

- **Inventory**

1. Add & subtract inventory
2. View inventory
3. Understanding “Inv. Level”, “Threshold”, “Hold Qty”, “On Hand”

- **Summary of sold items**

1. Identify popular & non popular items

- **Manage user accounts**

1. Add/edit or delete users

- **Sales Report**

1. View daily, weekly, monthly report
2. Find category and item summary

- **Print labels**

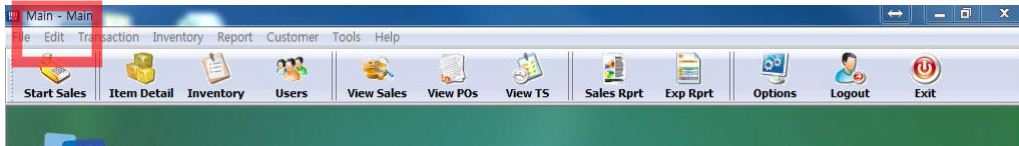
1. Create and print labels in different sizes.

- **Manage customers**

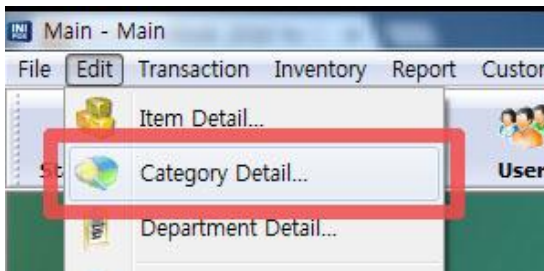
1. Create & edit customers
2. Setup reward points system

- Item detail

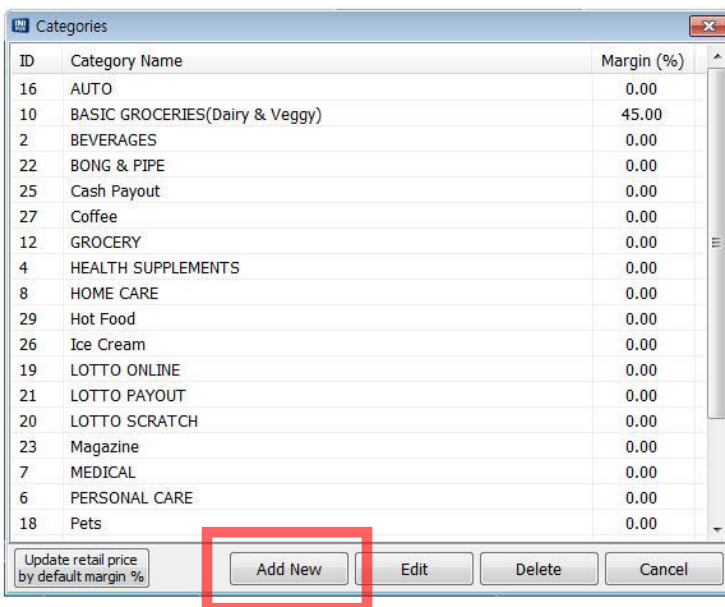
1. Create & modify Category



➤ Go to edit tab (located at top left corner of the back office interface)

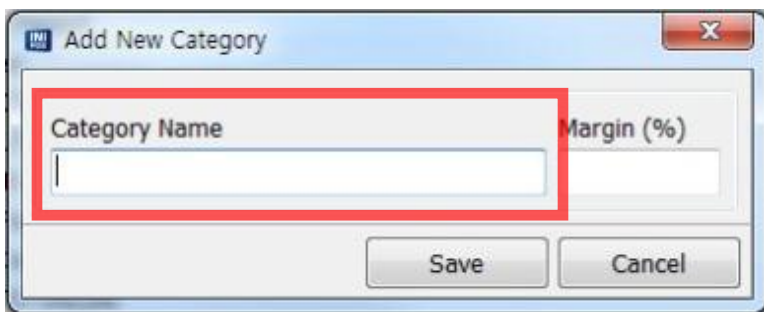


➤ Click "Category Detail..."



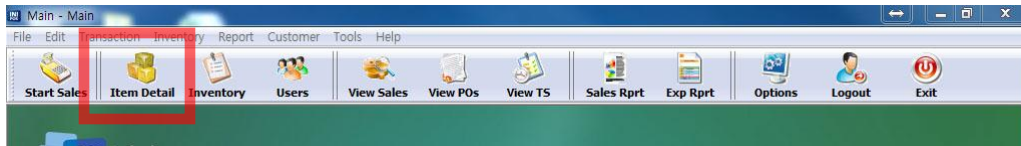
➤ Click "Add New" button to create a new category.

* To edit existing category, choose category from the list. Then click "Edit" button. Modify category name and click "Save" button.

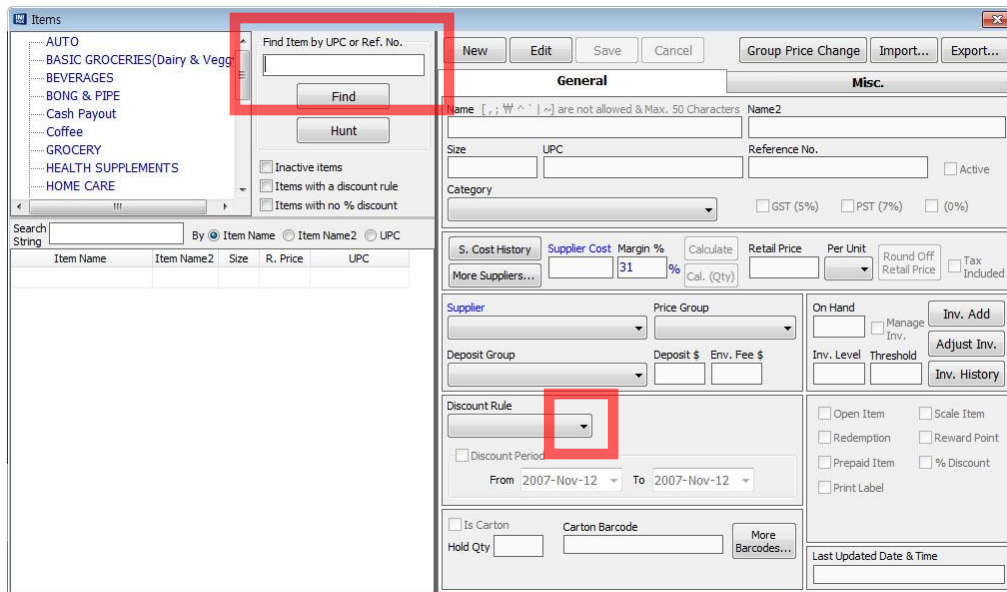


➤ Enter Category Name and click "Save" button.

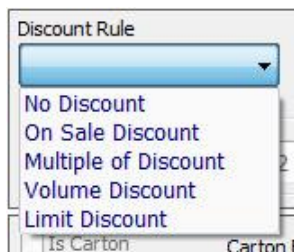
2. Setup discounts on items



- Click "Item Detail" (located at top left corner of the back office interface)



- Scan the items that you wish to set up discount rule.
- Click triangle icon to browse discount rules.
- Now you can select discount rule(*see image below)



**Additional information follows next page...*

a) On sale discount

- This discount rule allows you to sell your item with your desired discounted price and show your item's original price.
- To apply this setting, locate your mouse cursor onto "On Sale Discount" and click.

- Then enter price and click "Save" button.

b) Multiple discount

- This discount rule allows you to apply discounts when customer buys more than one of the same items.
- To apply this setting, locate your mouse cursor onto "Multiple of Discount" and click.

- Then enter quantity & price and click "Save" button.

- *See image below to apply discount on three of the same items for \$3.00

c) Volume discount

- This discount rule allows you to apply discounts when customer buys more preset quantity of the same items.
- To apply this setting, locate your mouse cursor onto "Volume Discount" and click.

- Then enter quantity & price and click "Save" button.

- Ex.) Discount setting; over '3' for '\$2.00' each(*see image below), customer purchased 4 of the this item,

Over for \$ each

and the result will be...

Qty/Weight	Unit P.	Ext. P.
4	>3@\$2.00	\$8.00

*4 items x 2 dollars= \$8.00

d) Limit discount

- This discount rule allows you to setup discount within limited quantity of the same items.
- To apply this setting, locate your mouse cursor onto "Limit Discount" and click.

Discount Rule
 Less than or equal to for \$ each
☐ Discount Period
 From To

- Then enter quantity & price and click "Save" button.

- Ex.) Discount setting; Less than '3' for '\$2.00' each(*see image below),

Less than or equal to for \$ each

and the result will be...

Qty/Weight	Unit P.	Ext. P.
2	\$2.00	\$4.00

*result when customer purchased more than 3 items

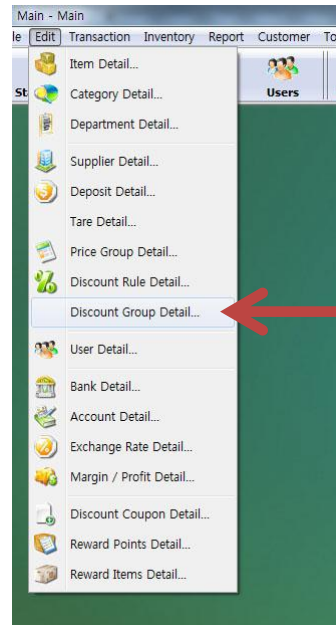
Qty/Weight	Unit P.	Ext. P.
1	\$4.00	\$4.00
3	\$2.00	\$6.00

*result when customer purchased less than or equal to 3 items
 (as you can see, discount is applied for those three items only)

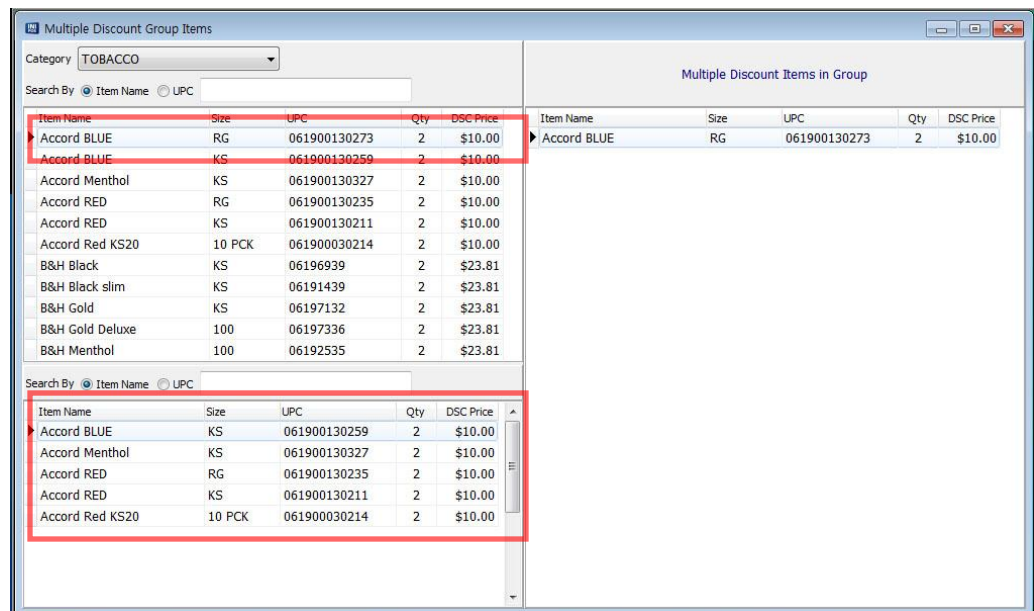
e) Setup Mix and Match (multiple of discount)

*before continue you need to set up "Multiple of Discount" option.

Please refer to description on "Appendix A_2. Setup discounts on items_b) Multiple of discounts"



Click "Discount Group Detail..."



Multiple of for \$

*You must apply same discount setup for all of the items to put them in the same discount group.

- Select the category, search for a desired item, and click the item. Then you will be able to see the list of the items that have the same discount setting as the item you selected.
- Just double click on the items from the list to bind them together with the item that you selected.

Multiple Discount Items in Group					
	Item Name	Size	UPC	Qty	DSC Price
0	▶ Accord BLUE	RG	061900130273	2	\$10.00
0	Accord RED	KS	061900130211	2	\$10.00
0	Accord BLUE	KS	061900130259	2	\$10.00
0	Accord RED	RG	061900130235	2	\$10.00
0	Accord Menthol	KS	061900130327	2	\$10.00

- Once you finished binding items by double clicking, you will be able to see the list of items that are in the same group.
- *You can double click on the items to remove them from the list.

3. Setup supplier cost & Calculate margin

The screenshot shows the 'Items' window in the INI Solutions software. On the left is a list of items with columns for Item Name, Item Name2, Size, R. Price, and UPC. The 'Ice Cream Cake' item is selected. On the right is the 'General' tab for item setup. The 'Name' field is 'Ice Cream Cake', 'Size' is '220', and 'Category' is 'Ice Cream'. The 'Supplier Cost' is \$20.00, 'Margin %' is 50%, and 'Retail Price' is \$40.00. The 'Discount Rule' is set to 'No Discount'. The 'On Hand' quantity is 0. The 'Last Updated Date & Time' is 05/04/2016 5:45:00 PM.

Item Name	Item Name2	Size	R. Price	UPC
1L Ice Cream			\$7.95	209
Banana Split			\$6.00	219
Extra Toppings			\$0.35	210
Hard Waffle Cone			\$3.80	208
Ice Cream Cake			\$26.50	220
LG Dipped Cone			\$3.40	206
LG Hard Cone			\$2.85	204
LG Hot Sundae			\$3.65	214
LG Polar Puppy			\$3.55	227
LG Shake			\$4.45	222
LG Slush / SM Cone			\$1.85	230
LG Soft Cone			\$2.65	202
LG Sundae			\$3.40	212
LG Twister			\$6.00	224
LG Yogurt			\$3.25	218

- Click and open “Item detail” window from the “Back Office” interface.
- Select or scan item.
- Enter supplier cost, and your desired percentage of the margin.
- Click “Calculate” button then you will be able to see the appropriate retail price of the item.

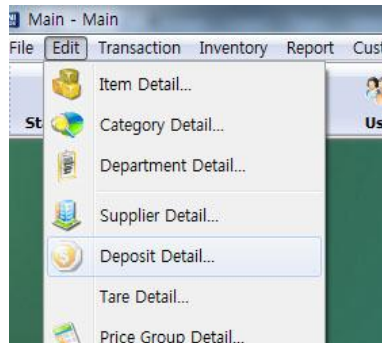
➤ ex.) Supplier Cost; \$20.00, Margin; 50%, Appropriate retail price;\$40.00

*You should sell this item for \$40 to earn 50% margin from the retail price.

*In other words, when you sell this item you will get 20 dollars in profit.

S. Cost History	Supplier Cost	Margin %	Calculate	Retail Price
More Suppliers...	20.00	50 %	Cal. (Qty)	40.00

4. Create a new bottle deposit group

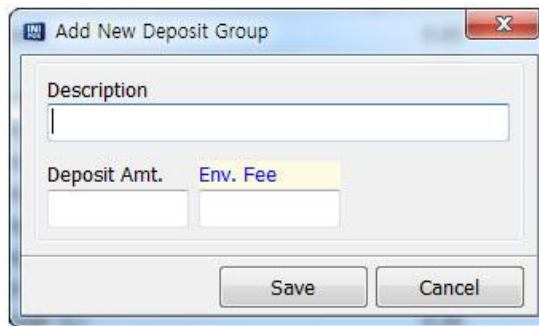


- Click “Edit”, and then click “ Deposit Detail...” from “Back Office” interface.

- Then you will see “Deposit Groups” window.
*see the image below...

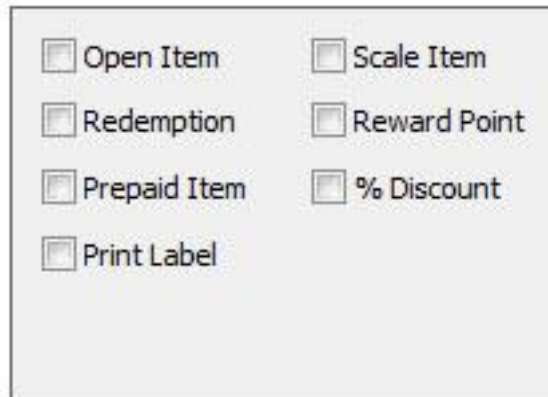
INI Deposit Groups		
Description	Deposit Amt.	Env. Fee
12pack water	0.60	0.36
15 can	0.75	0.15
24pack water	1.20	0.72
Aluminium(0-1L)	0.05	0.01
Aluminium(0-1L)12pk	0.60	0.12
Aluminium(0-1L)6PK	0.30	0.06
Aluminium(0-1L)8PK	0.40	0.08
Aluminum(0-1L) 4PK	0.20	0.04
Bi-Metal(0-1L)	0.05	0.05
Bi-Metal(Over 1L)	0.20	0.00
<div> <div>New</div> <div>Edit</div> <div>Cancel</div> </div>		

- Click “New” button



- Enter description, deposit amount, and environmental fee.
- Click “Save” button.

5. Options



- You may find these options from “Item Detail” window.

a) Open item

Apply this option to leave an item to open price, and you may charge upon each transaction of sales.

b) Scale Item

This option is required to use scale input system.

c) Redemption

You may use this option as redeeming function. (ex. Bottle Return, Lottery Redemption)

d) Reward Point

Apply this option for the customer to collect reward points from the item.

e) %Discount

Apply this option to make the item discountable.

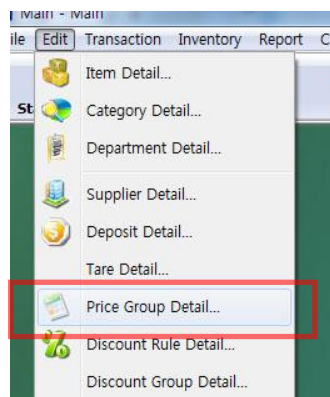
f) Print Label

Apply this option to include your item into the label printing group.

6. Set group price for similar items.

*This function allows you to easily adjust multiple items price.

STEP 1 – create price group



- To create price group, click “Price Group Detail...” from “Edit” tab.
- Click “New” button to create new price group.
- Enter “Group Name” and “Unit Price”
- Click “Save” button.

STEP 2 – apply price group

- Go to item detail window, scan the item to apply price group.

- Click the blank under “Price Group”, select the appropriate group from the drop down list.

- Click “Save” button.

*Repeat **STEP 2** to set multiple items to one specific price group.

STEP 3 – change the price of multiple items within a specific group


- Return to “Price group detail...”

- Select the group from the list.
- Click “Edit” button.
- Change the price.
- Click “Save” button.

*Then all of the items under this group setting will be updated to newly entered price.

• Inventory

1. Add & subtract inventory

- Click “Inventory”.
- Scan item or select item from the list.
- Click  button.

- To add quantity, select “Add” .
- Enter “Quantity”, then click “Apply” button

- To subtract quantity, select “Subtract”.
- Enter “Quantity”, then click “Apply” button.

*Select “Loss” if this adjustment is required due to damaged or stolen item.

2. View inventory

- Click  button to view inventory adjustment history.

3. Understanding “Inv. Level”, “Threshold”, “On Hand”

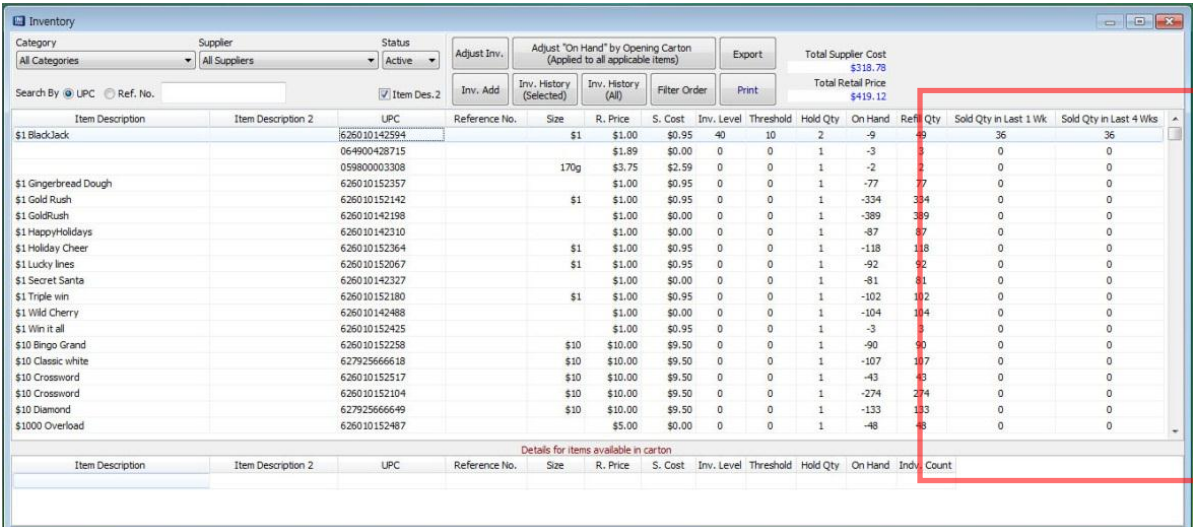
- “Inv. Level” indicates the minimum quantity of items that you should have in stock.
- “On Hand” indicates current quantity in stock.
- “Threshold” indicates currently set minimum order quantity.

*Only when ‘On-Hand’ is less than Threshold qty, then it will display quantity needs to be ordered when click Filter Order button.

• Summary of sold items

1. Identify popular & non popular items

- See these two columns to identify popular items.

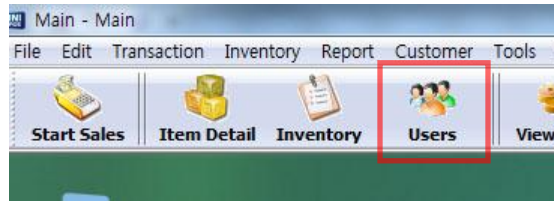


Item Description	Item Description 2	UPC	Reference No.	Size	R. Price	S. Cost	Inv. Level	Threshold	Hold Qty	On Hand	Ref. Qty	Sold Qty in Last 1 Wk	Sold Qty in Last 4 Wks
\$1 BlackJack		626010142594		\$1	\$1.00	\$0.95	40	10	2	-9	-9	36	36
		064900428715			\$1.89	\$0.00	0	0	1	-3	3	0	0
		059800003308		170g	\$3.75	\$2.59	0	0	1	-2	2	0	0
\$1 Gingerbread Dough		626010152357			\$1.00	\$0.95	0	0	1	-77	77	0	0
\$1 Gold Rush		626010152142		\$1	\$1.00	\$0.95	0	0	1	-334	334	0	0
\$1 GoldRush		626010142198			\$1.00	\$0.00	0	0	1	-389	389	0	0
\$1 HappyHolidays		626010142310			\$1.00	\$0.00	0	0	1	-87	87	0	0
\$1 Holiday Cheer		626010152364		\$1	\$1.00	\$0.95	0	0	1	-118	118	0	0
\$1 Lucky lines		626010152067		\$1	\$1.00	\$0.95	0	0	1	-92	92	0	0
\$1 Secret Santa		626010142327			\$1.00	\$0.00	0	0	1	-81	81	0	0
\$1 Triple win		626010152180		\$1	\$1.00	\$0.95	0	0	1	-102	102	0	0
\$1 Wild Cherry		626010142488			\$1.00	\$0.00	0	0	1	-104	104	0	0
\$1 Win it all		626010152425			\$1.00	\$0.95	0	0	1	-3	3	0	0
\$10 Bingo Grand		626010152258		\$10	\$10.00	\$9.50	0	0	1	-90	90	0	0
\$10 Classic white		627925666618		\$10	\$10.00	\$9.50	0	0	1	-107	107	0	0
\$10 Crossword		626010152517		\$10	\$10.00	\$9.50	0	0	1	-43	43	0	0
\$10 Diamond		626010152104		\$10	\$10.00	\$9.50	0	0	1	-274	274	0	0
\$1000 Overload		627925666649		\$10	\$10.00	\$9.50	0	0	1	-133	133	0	0
		626010152487			\$5.00	\$0.00	0	0	1	-48	48	0	0

- Click “Sold Qty in Last 1Wk” to sort by “low to high” or “high to low”
- Compare quantity to find most sold items within a week (or a month).

• Manage user accounts

1. Add/edit or delete users



- Click "Users" from "Back Office" interface.

 A screenshot of the 'Add New User' dialog box. The dialog has a title bar with the INI logo and the text 'Add New User'. It contains several input fields: 'Last Name', 'First Name', 'User Access Code', 'Address', and 'Memo'. There are also two dropdown menus labeled 'Group' and 'Status'. A 'Duplicate Check' button is located next to the 'User Access Code' field. At the bottom of the dialog, there are three buttons: 'Add External User Group', 'Save', and 'Cancel'.

- Click "Add New" button to create a new user account
- Enter "Last Name" and "First Name"
- Enter "User Access Code"
* This will be your future password to login with this account.
- Click "Duplicate Check" button.
- Select "Group".
* Each group category has different level of access authorization.
- Select "Active" from "Status" section.
* You may select "Inactive" to delete the existing account.
- Click "Save" button.

**If you would like to modify existing account, select the account to be modified and click "Edit" button, then follow the instructions written above.*

• Sales Report

1. View daily, weekly, monthly report



- Click "Sales Rprt" from "Back Office" interface.

Report Dates

☐ Sales Time

From: 01-Apr-2016 04:32:48 PM

To: 30-Apr-2016 04:32:48 PM

Show Report

- Choose "Report Dates" to view report daily, weekly, monthly.

- Click "Show Report" button.

2. Find category and item summary

Report By...			
To 2016-04-30			

>> Category Name	Count	Cost Total	Sales Total

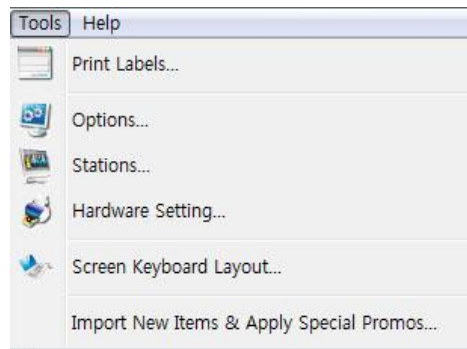
*** Dept: Lottery			
>> LOTTO ONLINE			
2.000	0.00	13.48	
>> LOTTO SCRATCH			
36.000	34.20	36.00	
SubTotal:	34.20	49.48	
*** Dept: Grocery			
>> BASIC GROCERIES(Dairy & Veggy)			
4.000	0.00	12.01	
>> GROCERY			
8.000	0.00	15.00	
>> Hot Food			
1.000	0.00	9.99	
>> Ice Cream			
12.000	0.00	28.15	
>> Sub Wrap			
2.000	0.00	2.95	
SubTotal:	0.00	68.10	

- "Dept:" indicates Category name

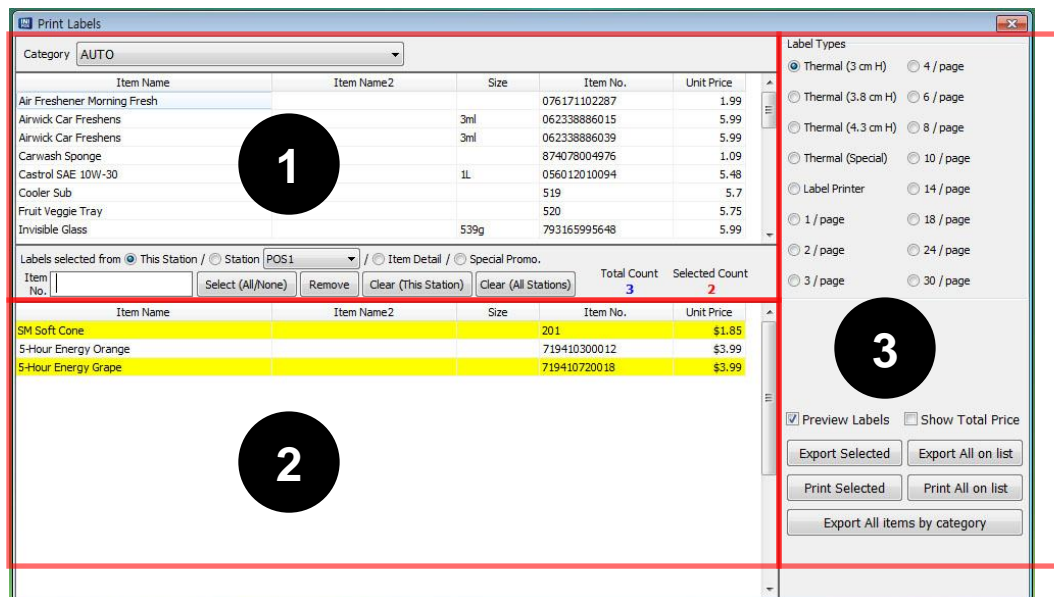
- You may find the summary of items under "Category Name"

• Print labels

1. Create and print labels in different sizes.



➤ Click "Print Labels..."



STEP 1

➤ Find the item to be printed as label and double click

STEP 2

➤ Repeat *STEP 1* as many times as you need.

STEP 3

➤ Select the appropriate printing size and click "Print Selected" button.

• Manage customers

1. Create & edit customers

The screenshot shows a software window titled "Add New Customer". It contains the following fields and controls:

- *Customer No.:** Text input field with a "Duplicate Check" button next to it.
- Status:** Dropdown menu with "Active" selected.
- Reward Points:** Text input field.
- Credit Balance:** Text input field.
- *First Name:** Text input field.
- *Last Name:** Text input field.
- Company Name:** Text input field.
- Balance Limit:** Text input field.
- *Phone:** Text input field.
- Brith Date:** Checkable field (unchecked).
- Date Entered:** Date picker showing "20-Apr-2016".
- Email Subscription:** Dropdown menu with "Yes" selected.
- E-Mail:** Text input field.
- Referred By:** Text input field.
- Address 1:** Text input field.
- Address 2:** Text input field.
- City:** Text input field.
- Province / State:** Text input field.
- Postal Code / Zip Code:** Text input field.
- Country:** Text input field.
- Account Rep.:** Dropdown menu with "..." selected.
- Source:** Dropdown menu with "..." selected.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

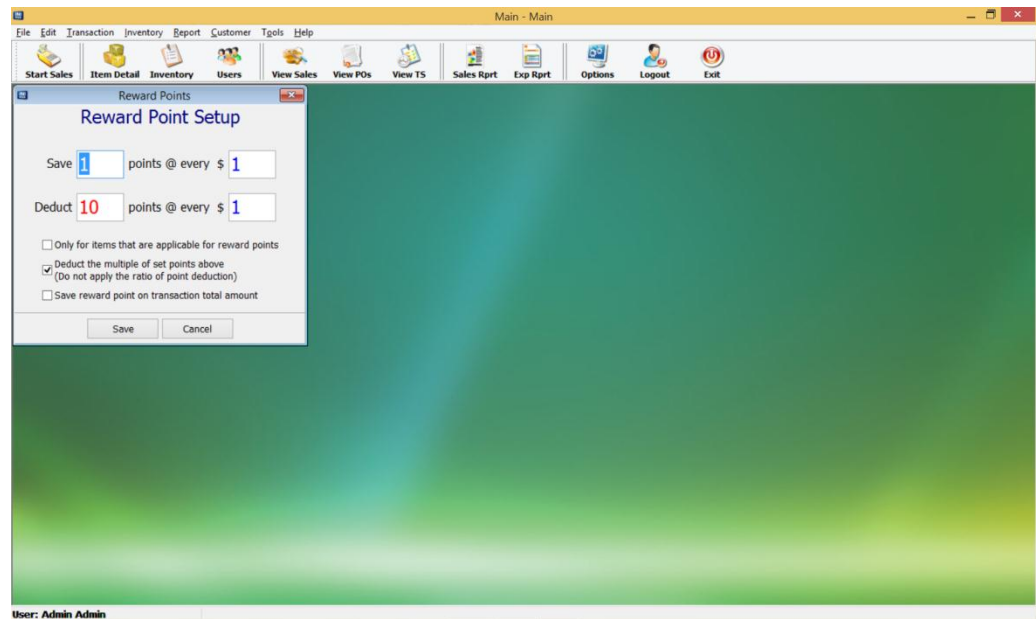
- "Back Office" interface > "Customer" > "Customer Detail..."
- Click "Add New" button from customer detail window.
- Enter "Customer No.", "First Name", "Last Name", "Phone" and other contact information as well.
- Click "Save" button.

2. Setup reward points system

a. Reward point system works as follows,

- i. Customer collects points whenever they purchase items.
- ii. Customer can spend points as certain dollar to purchase items.

To set up point ratio, go to Edit-> Reward Points Detail



In this example, customer can earn 1 point for every 1 dollar spend then later he can use 10 point as 1 dollar amount.

- a. To collect point simply, create customer information, and then enter his phone number or customer number before completing sales transaction. You will see customers name and current points on the right side on the screen.

Item Description	Qty/Weight	Unit P.	Ext. P.	Tax	#
Open Item (No Tax)	1	\$10.00	\$10.00		1

Sub Total	\$10.00	GST (5%)	\$0.00	PST (7%)	\$0.00	LFST (10%)	\$0.00
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<div> <div>FXN</div> <div> <div>Last Receipt</div> <div>Hold</div> <div>Recall</div> <div>% Discount</div> <div>\$ Discount</div> </div> <div> <div>Open Till</div> <div>Cash Pay Out</div> </div> <div> <div>Exit</div> <div>Void</div> <div>Delete</div> <div>Closing Menu</div> <div>Cashier Station Report</div> <div>Item Update</div> <div>Price Check</div> </div> </div>	<table border="1"> <tr> <td>7</td><td>8</td><td>9</td><td>✓</td><td>+</td><td>-</td></tr> <tr> <td>4</td><td>5</td><td>6</td><td>Enter</td><td>Debit</td><td></td></tr> <tr> <td>1</td><td>2</td><td>3</td><td></td><td>Credit</td><td></td></tr> <tr> <td>0</td><td>00</td><td>.</td><td>CLR</td><td>Cash</td><td></td></tr> <tr> <td>\$10</td><td>\$5</td><td>\$10</td><td>\$20</td><td>DEL</td><td></td></tr> </table>	7	8	9	✓	+	-	4	5	6	Enter	Debit		1	2	3		Credit		0	00	.	CLR	Cash		\$10	\$5	\$10	\$20	DEL	
7	8	9	✓	+	-																										
4	5	6	Enter	Debit																											
1	2	3		Credit																											
0	00	.	CLR	Cash																											
\$10	\$5	\$10	\$20	DEL																											

<div> <div>Ini Ini</div> <div>0 P</div> <div>Total</div> <div>\$10.00</div> <div>Paid</div> <div>\$0.00</div> <div>Due</div> <div>\$10.00</div> </div>	<div>Item or Ref. No. / Price / Payment</div> <div>6046288772</div> <div>Qty / Wght</div> <div>1</div>
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[Main] Admin Admin 1.2310 Receipt-ON Coupon-OFF 10:32:24 AM

- b. When customer wish to spend points, enter his phone number or customer number before completing sales transaction, then press Reward point payment. If the point

is enough to pay the transaction, it will complete the sales transaction.

Due Amount				Change	
Payment		\$1.00	\$0.00		
R. Point		\$1.00			
Total				\$0.00	
Paid				\$0.00	
Due				\$0.00	

Sub Total	GST (5%)	PST (7%)	LPST (10%)	Item or Ref. No. / Price / Payment	Qty / Weight
\$0.00	\$0.00	\$0.00	\$0.00		1

FXN

Last Receipt

Hold

Recall

% Discount

\$ Discount

Open Till

Cash Pay Out

Reward Point Payment

Exit

Void

Delete

Closing Menu

Cashier Station Report

Item Update

Price Check

7

8

9

✓

+

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4

5

6

Enter

Debit

1

2

3

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Credit

0

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CLR

Cash

\$0

\$5

\$10

\$20

DEL

[Main] Admin Admin

1.2310

Receipt-OR Coupon-Off

10:37:46 AM