Poster

Quick Start Guide

Poster

Hello!

Poster, the intuitive point of sale with integrated payments.

You should be communicating with guests, not software. That's why we've partnered with Poster. Fast, reliable and integrated - Poster is the best in point of sale and stock management. Eliminate human error and grow your business with this revolutionary cloud based point of sale that boasts integrated payments from iKhokha. By using the iKhokha & Poster integration, all of your card, cash and loyalty payments are captured in one place. With Poster's fully functional back-office, you can manage your restaurant, cafe or shop from anywhere in the world easily and effectively.

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Getting Started

Essential **Hardware**

Every business needs cogs to make the wheels turn.
Please make sure you have the essential hardware components required to get set up.

Minimum requirements

1 iKhokha Card Machine

2 Samsung Tab A 10.1 inch
OR Apple iPad

3 Universal Tablet Stand

4 Cash Drawer

5 Datecs EP700 ESC/POS printer

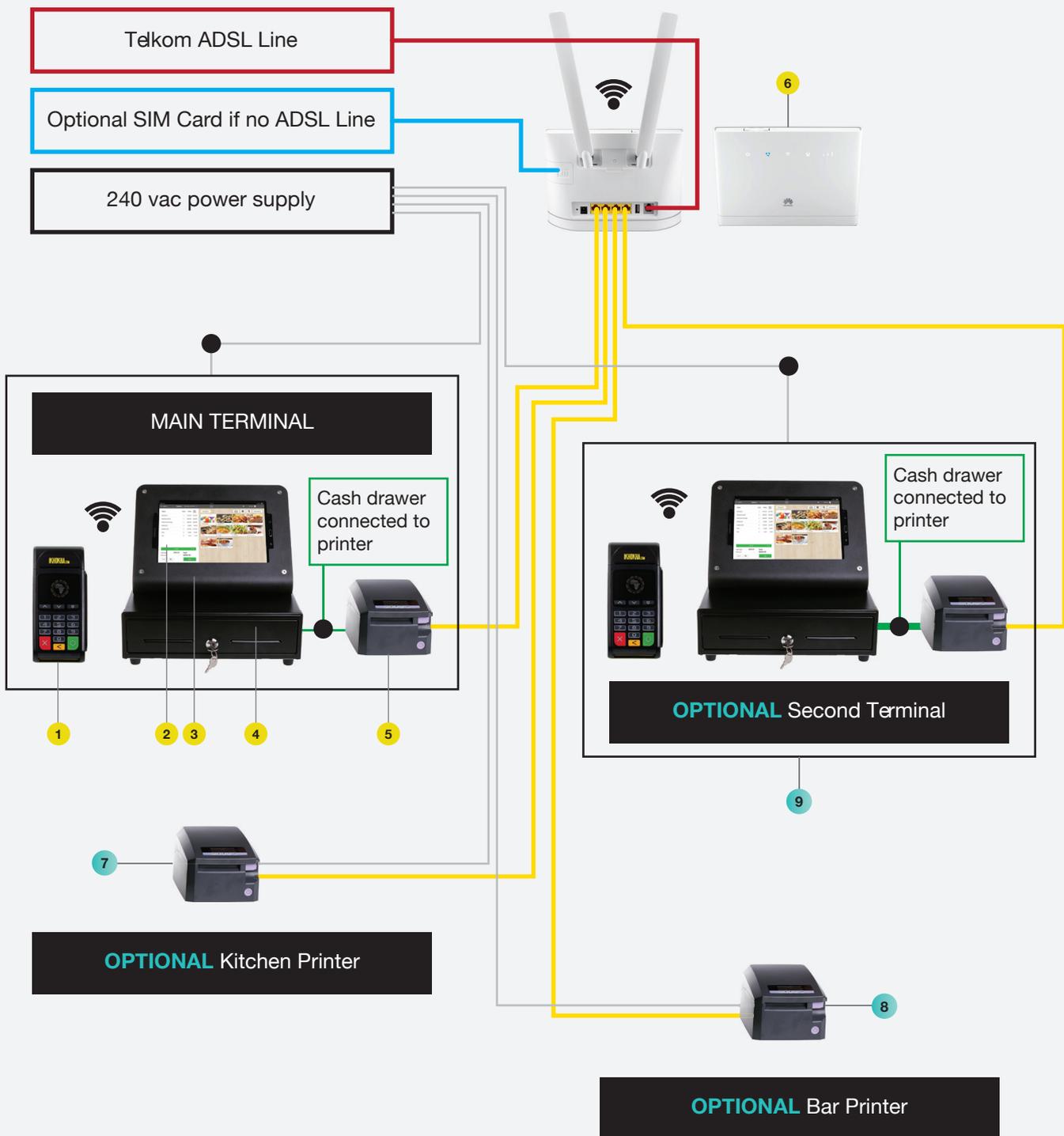**6** Wi-Fi Router
We recommend the "Huawei LTE B315"

Optional extras

7 **Kitchen**
Datecs EP700 ESC/POS printer

8 **Bar**
Datecs EP700 ESC/POS printer

9 **Additional**
Second Serving POS Terminal

Shop **Prep**

Poster has a fully functional back office. However, you need to populate Poster with your business elements in order to get the most value out of it. Here are a few things you will need in order to set up Poster for your business:

1. A list of products. Products are items that you purchase and resell without modification, e.g. a can of coke, a bar of chocolate. Click here for a product excel template.

2. If you are setting up a restaurant, you will need to make a list of all your dishes, e.g. burger and chips, fish and rice, chicken and mushroom pasta. You will also need to state which station each dish comes from, e.g. food dishes will come from the Kitchen and drinks will come from the Bar.

3. Make a list of all your preparations including their recipes. If you manufacture prepared dishes that are sold in combination as a dish, e.g. fish and savoury rice. Savoury rice will be the preparation and may not necessarily be sold on its own.

4. Make a list of all ingredients used in all dishes and preparations. A good way to double check your ingredients is to list all the recipes of all your dishes and preparations. Click here for an ingredients excel template.

5. Collect or take pictures of all your products and dishes.

6. Create storage zones, e.g. Front Store -- where stock is kept for daily sale, Back Store -- where extra stock is kept.

7. Create a list of all your suppliers including their contact details and VAT numbers.

8. Create a list of your employees and their positions.

9. Any financial accounts you would like to use for payment of suppliers, e.g. bank account, safe deposit account.

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Telkom ADSL Line

Optional SIM Card if no ADSL Line

240 vac power supply

6

MAIN TERMINAL

Cash drawer connected to printer

1   2   3   4   5

7

OPTIONAL Kitchen Printer

Cash drawer connected to printer

OPTIONAL Second Terminal

9

8

OPTIONAL Bar Printer

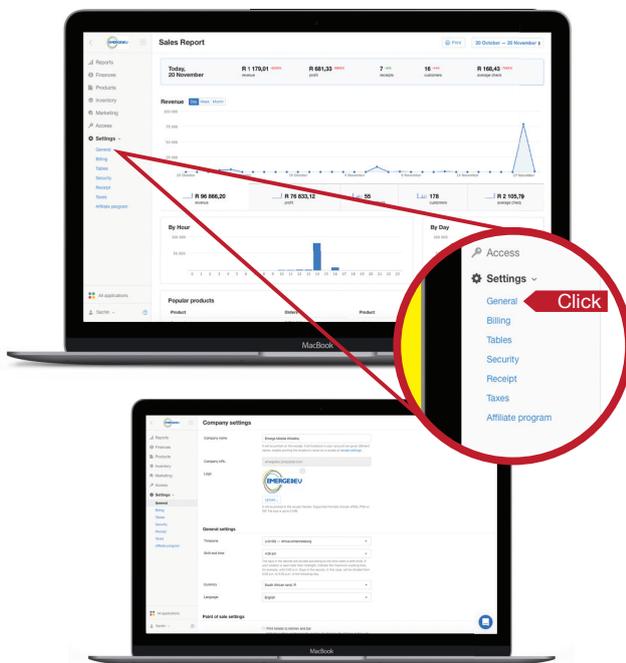# Poster Hardware Setup

Diagram: How to get connected

Back Office

A fully functional back office means smooth sailing. Make sure your back office is correctly set up to run all aspects of your business.

General Settings

**You can use the General settings tab to set up your store.**

1. Go to **Settings > General,** on the left menu.
2. Under Company Settings, you can add a logo.
3. Navigate to Management settings:
   a. "Use manufacturing of dishes and preparations" - tick this box if you want to keep track of all dishes and preparations made onsite.
   b. "Use cash shifts" - tick this box if you want to track your cash up shifts.
   c. "Sum gift-card payments to the proceeds" - tick this box if you hand out vouchers and would like your customers to use these to pay for goods.
   d. "Staff time tracking" - tick this box if you wish to track the working time of your staff.
   e. "Low stock alert" - tick this box if you want an email sent to notify you of low stock levels of each product/ingredient. Limits are set under "Inventory > Stock".
4. Add an email address to receive notifications.
5. Remember to click on Save once complete.

Table Settings

**You can use the Table settings tab to set up tables in your store.**
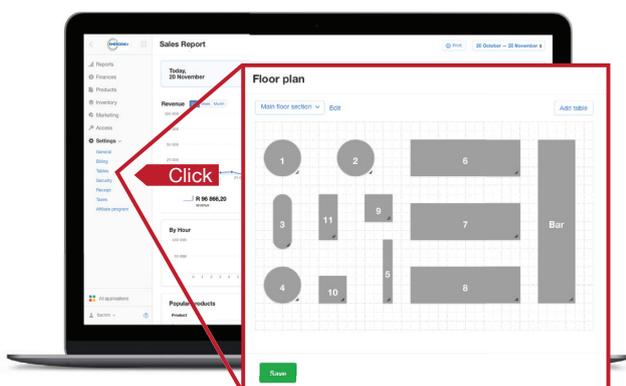
1. Go to **Settings > Tables** on the left menu.
2. Click on "Add table" to add a table to the floor or click on the "X" and hover over the table to delete it.
3. Double click on the table to change the shape of the table.
4. Double click on the table number to rename it.
5. Click on the dropdown box and scroll to the "Add floor section" to add another floor section, then setup using the instructions above.
6. Remember to click on Save once complete.

*Not available on the Retail Package

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Security Settings
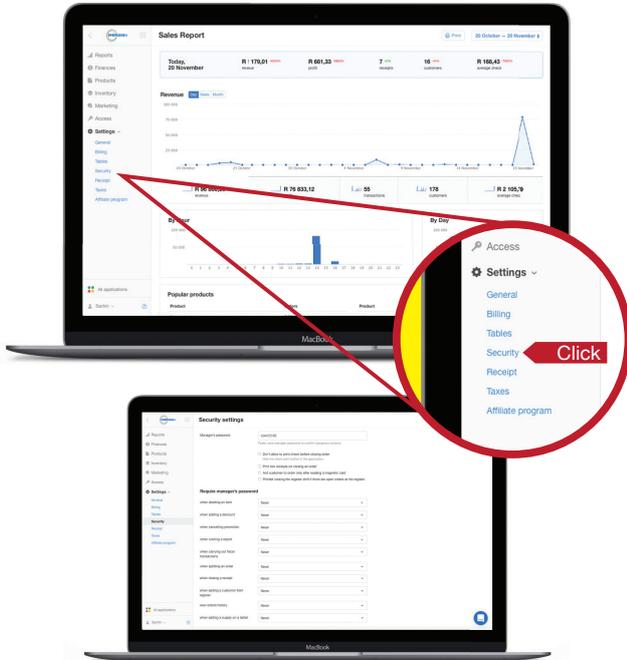
Set up and view passwords, and amend printer settings.

1. Go to **Settings > Security** on the left menu.
2. Setup the manager's password.
3. Tick the checkbox "Don't allow to print check before closing order" if you do not want to allow the option to print the receipt before closing the order.
4. Tick the checkbox "Print two receipts on closing an order" if you require two receipts to be printed after closing an order.
5. Tick the checkbox "Add customer to order only after reading a magnetic card" if you will be adding customers to orders using a card reader.
6. Tick the checkbox "Prohibit closing the register shift if there are open orders at the register" to control if register shift can be closed if orders are still open.
7. Navigate to "Tickets to the kitchen" - Allow printing of tickets before closing orders by selecting "Before closing the order" from the dropdown menu.
8. Navigate to "Require manager's password" to set when a manager's password is needed for a feature.

Receipt Settings
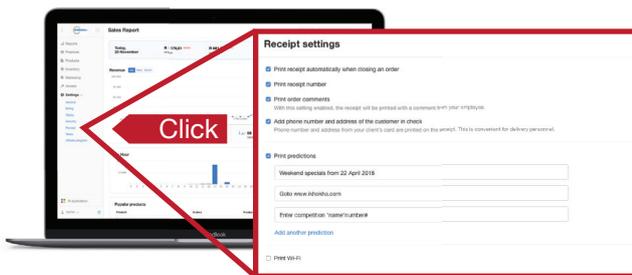
Print receipts and insert customised messages for your customer.

1. Go to **Settings > Receipt** on the left menu.
2. Choose when to print a receipt by ticking the relevant checkboxes.
3. Choose what is to be printed on the receipt by ticking the relevant checkboxes and completing the information prompted for, e.g. Wi-Fi details, order comments, messages at the bottom of the slip.
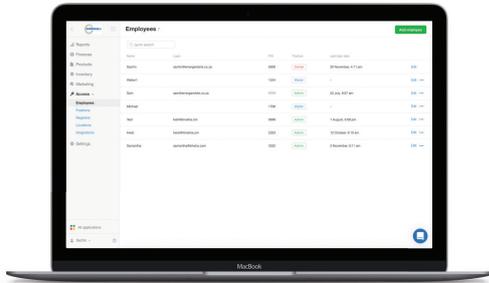
Taxes
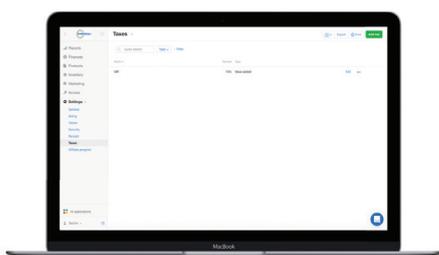
Set up your tax information here.

1. Go to **Settings > Taxes** on the left menu.
2. Setup your VAT by clicking the green "Add tax" button on the top right corner of the screen.
3. Add "VAT" as the name.
4. Add "15" as the percent.
5. Select "value-added" as the Type.

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Access

Easily access employee information, add employees or view your login and password details.

1. Go to **Access > Employees** on the left menu and easily add employees by clicking the green "Add employee" button on the top right of the screen.
2. Go to **Access > Positions** on the left menu - You can add person by person Positions and their payroll calculation commission pay outs.
3. Go to **Access > Registers** on the left menu – You can, at a glance, view your login and password for the front terminals.

Finances

Create and configure Financial Accounts. These can be your bank accounts, cash drawers or safe deposits.

1. Go to **Finances > Accounts** on the left menu.
2. Setup your accounts from which funds will be deducted for different transactions, e.g. if you pay for supplies from a bank account, then you can setup the account here, by clicking the green "Add account" button on the top right.

Products
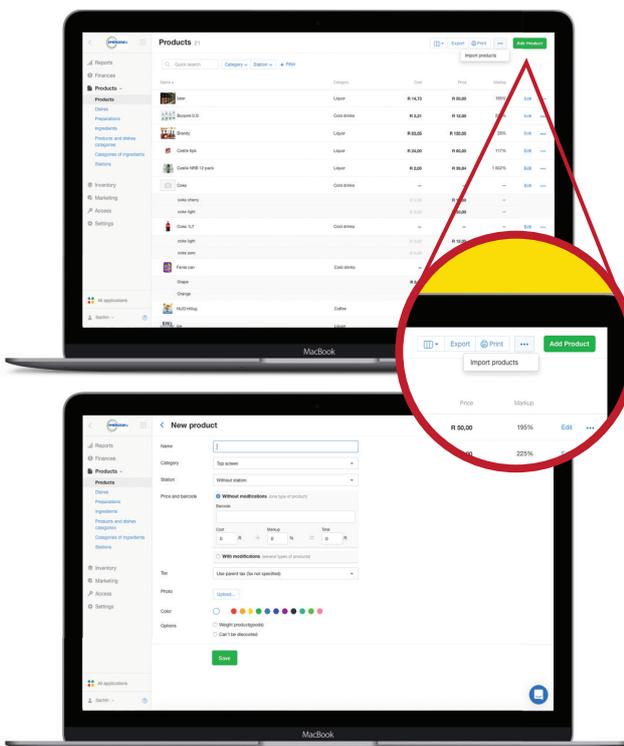
**Manage your product information and add, edit and categorise them accordingly.**

1. Go to **Products > Products** and dishes categories on the left menu to create categories. Remember to add a tax option to each category.
2. Go to **Products > Categories of ingredients** on the left menu to categorise your ingredients.
3. Go to **Products > Products** on the left menu. You can quickly add a product on the fly by clicking the green "Add Product" button on the top right. Alternatively, click on the three dots as demonstrated and import the excel .csv file you created when you made your product list.
4. Verify all products and add to system.
5. Click on Edit in order to amend the products information. You can now also upload a photo for the product.
6. Choose "With modifications" if the product comes in variants, e.g. Fanta – as it comes in a variety of flavours: orange, grape and pineapple.
7. If the product is sold by weight, then select checkbox "Weight product" e.g. biltong which is sold by weight. Enter a price per 100g.
8. Tax – choose your tax option.
9. "Can't be discounted" – tick this checkbox to exclude this item from any promotion that has been created on the system.
10. Remember to click on Save once complete.

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Ingredients

**You can use the Ingredients tab to add, measure and keep track of ingredient usage.**
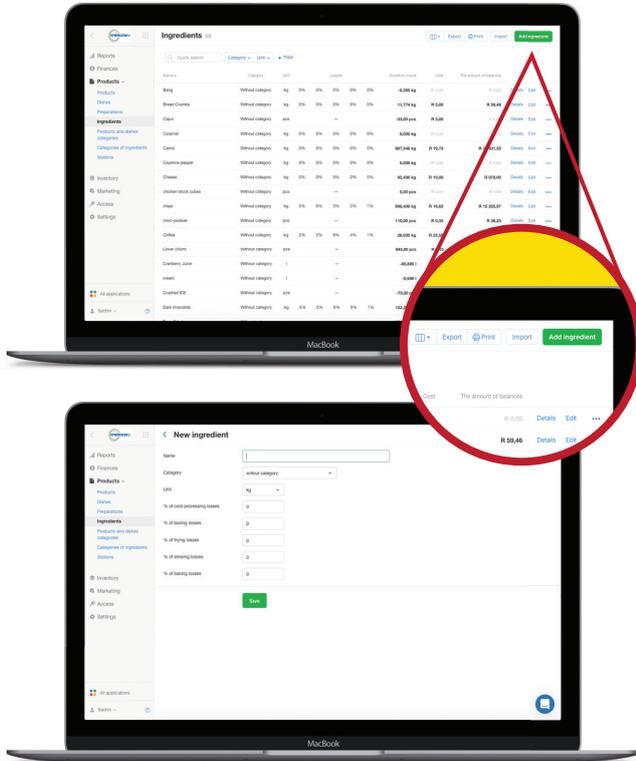
1. Go to **Products > Ingredients** on the left menu.
2. Click on "Add ingredient" to add each ingredient from your list created.
3. Click on Name to name your ingredient.
4. Click on Category and select the correct category.
5. Unit – You have three choices:
   5.1. "pcs" – This ingredient is supplied in single units and used in your dishes in single units, e.g. hake fillet is generally supplied in pieces and used in dishes as a single piece.
   5.2. "kg" – this ingredient is supplied in kg and is used in your dishes in mg/kg, e.g. Flour is supplied in kg and used in dishes like muffins in mg or kg.
   5.3. "l" – this is used for your liquid ingredients like milk. Milk is supplied in litres and is used in ml or l in dishes. *To understand how to categorise your ingredients you need to think in terms of how the ingredient is supplied and how it will be used in your dishes.*
6. "% of cold/boiling/frying/stewing/baking losses" – is the amount of loss incurred on an ingredient after that process. You start with a 100g fillet of steak and after frying the steak is now 95g, meaning you have lost 5g due to frying.

Preparations

You can combine ingredients into preparations. For example, eggs, flour and olive oil can be turned into the "Dough" preparation and added to different dishes.
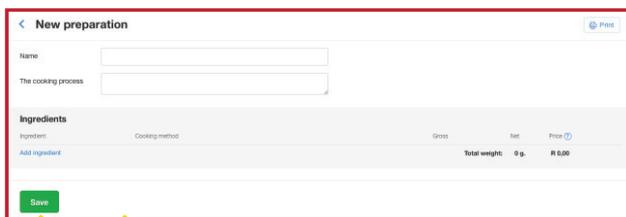
1. Go to **Products > Preparations** on the left menu.
2. Click on the green button "Add preparation" on the top right.
3. Name your preparation and describe the cooking process.
4. Click "Add ingredients" to add the different ingredients used in the formation of the dish, and add the amount needed per ingredient.

State-of-the-art POS software that is fast, reliable and fully integrated with iKhokha."

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Dishes

Dishes are made up of ingredients and preparations. Apart from the options common to the product setup, you now have several more options like the cooking process, cooking time and the recipe.

1. Go to **Products > Dishes** on the left menu.
2. You can import the excel .csv file that you created for your dishes by selecting the "import" button on the top right.
3. Import the file, confirm the import and Save.
4. To edit each dish, click on "Edit". Fill in the relevant details for the dish. It will now allow you to also add a picture of the dish and the cooking process.
5. Add a recipe by adding all the ingredients in the dish. Note that the cost will be zero until you input a supply with costs.
6. You can choose "Add On's" to a dish and set a charge or not. Add your modifier sets as required. Note that, in order to use a modifier option, you must input it as an ingredient first. Set a price if you want the customer to pay for Add On's.
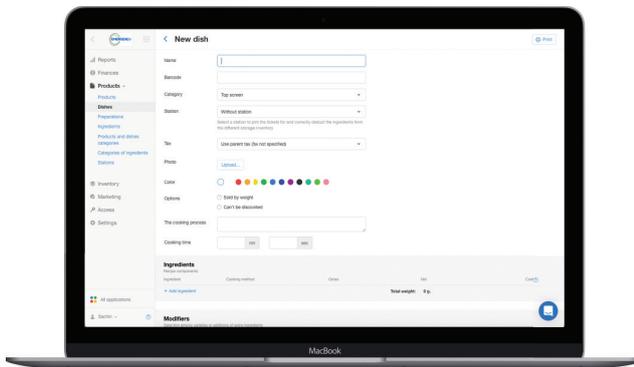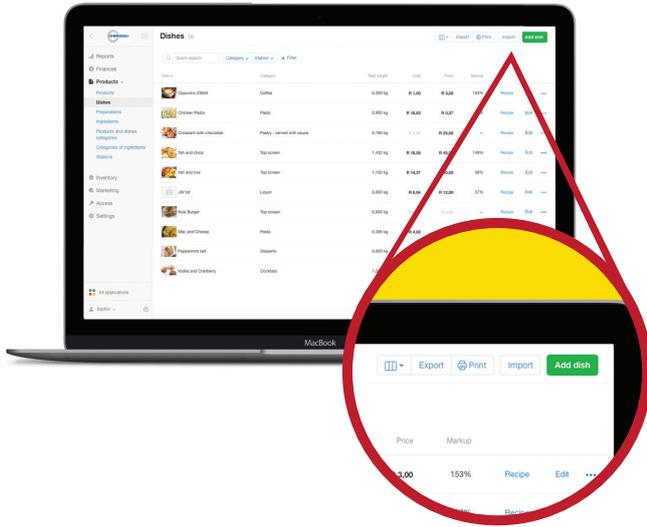
Add dish
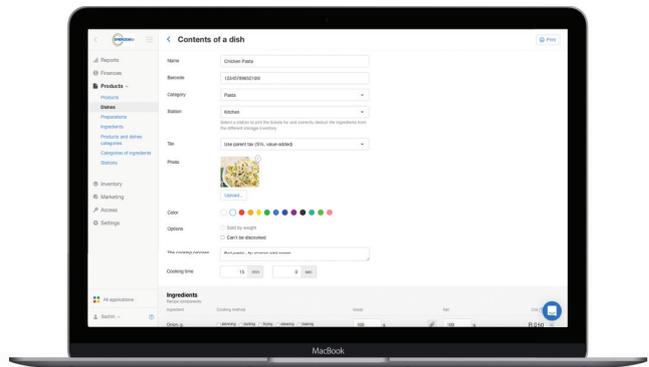
Edit dish

Automatically calculate dish cost

Once you add a supply, Poster will automatically recalculate costs for all of your products as well as profits from your previous sales.

Automatically monitor stock levels

View all your ingredient's and product's inventory counts in real time. Set a low stock alter threshold for every ingredient and get automatic alerts when an ingredient is low on stock.

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Suppliers

Here you will be able to easily add suppliers to your system.

1. Go to **Inventory > Suppliers** on the left menu.
2. Add your suppliers from the list that you have made. Fill in all their details to track your suppliers.
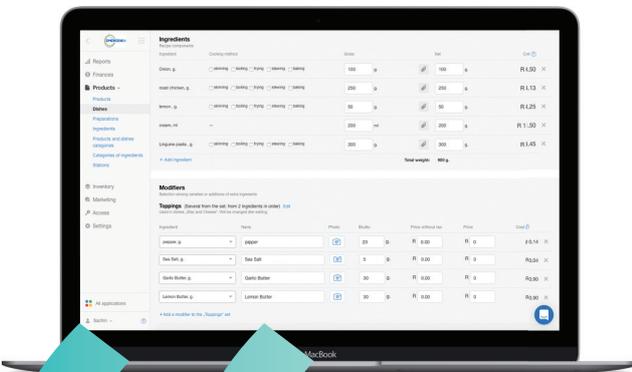3. Remember to click Save.

Supplies

Here you can use the Supplies settings tab to input supplies.

1. Go to **Inventory > Supplies** on the left menu.
2. To Add a supply, click on the green button "Add supply" on the top right. Be sure to input stock and cost of all your products as well as ingredients delivered from the supplier.
3. Remember to click Save.

Cost Setup

This tab will help you keep track of your dishes as well as costs.

1. Go to **Products > Dishes** on the left menu.
2. Click "Edit" a dish and navigate down the page to ingredients.
3. Add ingredients to a dish, and the cost for creating the dish will be calculated.
4. You can easily input the selling price under "Total" and Poster will automatically calculate the "Markup" and "Price without tax".
5. Remember to click Save.

Poster creates extraordinary POS experiences and seamless sales in-store, online or on-the-go
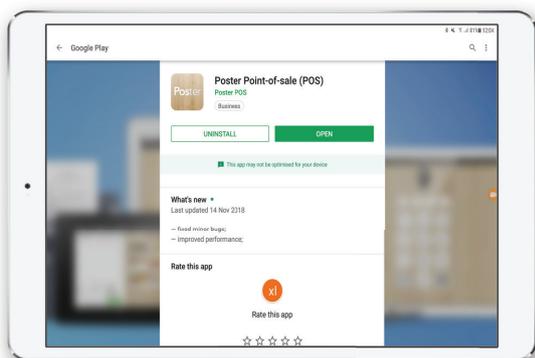
Shop Front

*Make sure that you have set up your point of sale correctly.*
Once everything is up and running, your business will be in one convenient place.

Download & set up the Poster App

The gateway to all your business related activities are housed in the App. Download it to get the most out of Poster POS and iKhokha.

1. Go to the **Google Play Store** or **Apple App Store** on your device, search for **Poster POS** and click **Download.**
2. Open the Poster App once successfully downloaded.
3. To find the login credentials for the Poster App. Open the back office, in your web browser. You should have the link on email. Go to **Access > Registers.**
4. Input the login username and password and click log in.
5. Input your four-digit code to give you access to the POS screen.
6. If you have selected the "Use cash shifts" option in the settings, the system will ask you to input a start cash float. Input the cash float and click "Done".
7. Your floor plan or store will be open to take orders.
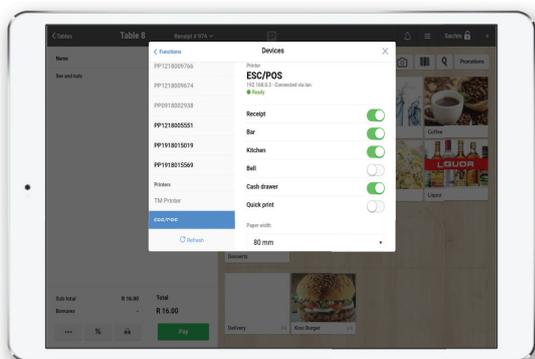
Set up Printer

1. Go to **Equipment > Devices**.
2. The app will now find devices that are available within your network.
3. Click on your printer.
4. Select the operation needed - if this printer will print receipts or station tickets and if it is required to open the cash drawer – you need to slide the button to green to select the function..

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Set up your iKhokha Card Machine

The following steps will link your card machine to Poster and get you accepting card payments.

1. Switch on your iKhokha card machine by holding down the power button.
2. On your tablet, navigate to the Bluetooth settings to pair with your iKhokha card machine and begin the pairing process.
3. Go to the Poster App and, on the top right of the screen, click on the three bars button to access the "Applications" window.
4. Go to **Equipment > Devices**.
5. The App will now find devices that are available within your network.
6. A Serial number is located on the back of the device and should start with "PP".
7. Click on the serial number. A window will pop up to the right and you will need to input your iKhokha login and password.

Take your first order

Begin taking orders with the simple click of a few buttons.
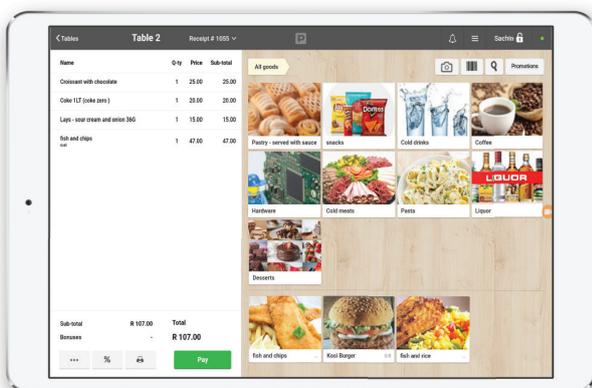
1. Select a table and number of guests to open the order screen.
2. Select items to add to the order.
3. Click "Pay" at the bottom of screen.
4. Input "Tips" if acquired.
5. Select the payment option, "Cash", "Card" or "Certificate".
6. Select if you want to print a receipt.
7. Click "Pay" to complete the transaction.

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