



HOSPITALITY EDITION

uPOS User Quick Guide

Clear, current procedures for Back Office, inventory, daily POS operations and troubleshooting.

inTouch support

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About this guide

A practical reference for trained hospitality users of uPOS. It covers common Back Office, inventory and front-of-house tasks; it does not replace site-specific training or financial controls.

1

Choose the right workspace

Tasks labelled Back Office are completed in the browser-based administration portal. Tasks labelled POS are completed on the restaurant terminal.

2

Use the names on screen

Button names appear in bold. A path such as Inventory > Purchases means open the first menu, then select the second item.

3

Save, then publish when required

Back Office edits must be saved. Product and menu changes may also need Publish before terminals receive them.

4

Keep an audit trail

Use the correct employee PIN, select meaningful void or adjustment reasons, and add notes when your operating procedure requires them.

SCREEN DIFFERENCES

Available screens and options depend on the device, assigned role, enabled modules and payment integrations. If your screen differs materially, stop and contact inTouch Support.

PROTECT TRADING DATA

Do not reinstall the POS, clear stored browser data, alter payment settings or factory-reset hardware unless inTouch Support instructs you to do so.

Find the task you need

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About this guide, permissions, publishing

2-4**02****Back Office**

Menu items, prices, modifiers and employees

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Access, permissions & safe working

Before changing live data, confirm that you are in the correct store, business date and user account.

1

Confirm your location

Multi-location users should verify the selected store before editing menus, employees, inventory or reports.

2

Use an authorised role

Permissions control activities such as editing users, opening tills, voiding, transferring checks, reopening paid checks and closing the day. Never share PINs.

3

Avoid busy-period changes

Schedule broad menu, inventory or software changes outside service. Complete in-progress payments before restarting a terminal or network device.

4

Record the result

After a material change, verify it on the intended terminal and keep any manager approval or supporting document required by your business.

MANAGER APPROVAL

If a function requests a manager PIN, the approving manager should enter their own credentials and review the action before proceeding.

PAYMENT SAFETY

Never retry, reverse or delete a payment merely because the POS appears slow. First confirm the result on the payment device and with the payment provider.

Create a menu item

Add a new sellable food or beverage item and define how it appears and routes at the POS.

GO

Menu path

Back Office > Products/Items > Products/Items > + New Menu Item

1

Open the item form

Select + New Menu Item. Choose the correct category and subcategory for reporting and POS placement.

2

Complete Basic Details

Enter the item name and any required short name, description, button colour or image. Use consistent naming so staff can find it quickly.

3

Set price, cost and tax

Enter the selling price and cost information required by your site. Confirm the correct tax category rather than assuming a default.

4

Choose sales behaviour

Set visibility, service types, printers and any other available operational options. Add the appropriate modifier groups where choices are required.

5

Save the item

Complete inventory details if your site uses stock control, then select Save. Publish the change and verify it on a terminal.

BEFORE PUBLISHING

Confirm spelling, price, tax, kitchen printer and modifier groups. These fields affect guest billing and production routing.

Edit or retire a menu item

Update an existing item without creating a duplicate. Use visibility or availability controls according to your site policy when an item should no longer be sold.

GO

Menu path
Back Office > Products/Items > Products/Items

1

Find the item
Search or filter the product list. Confirm the category and current price so you edit the correct record.

2

Open Edit
Select the item action menu ..., then choose Edit. Review all affected tabs, not only the field being changed.

3

Make the controlled change
Update the required name, price, tax, visibility, printer, modifier or inventory setting. Avoid altering unrelated settings.

4

Update and publish
Select Update, then publish. Check the item on the correct POS order type and confirm kitchen routing if relevant.

DO NOT DUPLICATE

If the item already exists, edit it. Duplicate products fragment sales history and may cause inconsistent stock depletion.

HISTORICAL REPORTING

Deleting or replacing an item can affect how historical and future reporting is interpreted. Follow your business policy before retiring items.

Change one selling price

Use the item editor for a single controlled price change.

GO

Menu path

Back Office > Products/Items > Products/Items > ... > Edit

1

Identify the item

Search for the exact menu item and open Edit from its action menu.

2

Open pricing

Locate the pricing and cost area. If serving sizes or price levels are used, select the correct one.

3

Enter the new value

Replace the selling price. Check decimal placement, tax treatment and any price overrides used by the store.

4

Update and publish

Select Update, then Publish. Confirm the new price on the POS before service.

PRICE CHECK

Test the item on a new check and confirm the displayed line price, tax and total. Remove the test item or void the test check correctly.

SCHEDULED CHANGES

If a future-effective price is required, use the process approved for your configuration rather than publishing early.

Update prices in bulk

Bulk Update is efficient for coordinated changes, but it can affect many live products at once. Work from an approved price list.



Menu path
Back Office > Products/Items > Bulk Update

1

Filter the list

Choose the relevant Category and Sub Category, then select Apply. Confirm that only the intended products are shown.

2

Enter Change To values

Enter each approved new price in the Change To field. Leave unrelated items unchanged.

3

Review the Change column

Compare current and proposed values. Check currency, decimals and serving-size context before committing.

4

Commit the update

Select Update Item Price. Wait for confirmation and do not refresh while the update is processing.

5

Publish and verify

Publish if required by your configuration. Test a sample from every affected category on the POS.

CONTROL TOTAL IMPACT

Keep the approved source list and record who completed the update. If the filtered set is wrong, stop before selecting Update Item Price.

Create or edit a modifier

Modifiers capture choices such as cooking preferences, extras or removals. Configure them consistently so pricing, production and inventory stay accurate.

GO

Menu path
Back Office > Products/Items > Modifiers

1

Create or choose
Select + New Modifier for a new record, or use the pencil icon to edit an existing modifier.

2

Define behaviour
Enter the name and maximum uses. Set tax, visibility and any other available sales behaviour correctly.

3

Set routing
Choose the kitchen printers that should receive the modifier. Confirm that special instructions reach the correct production station.

4

Configure prefixes and prices
Add allowed prefixes and serving-size prices where used. Check that chargeable options have the intended value.

5

Save and publish
Save or proceed to inventory mapping, then publish. Test the modifier through its assigned menu item.

MODIFIER GROUPS

Creating a modifier does not automatically place it on every item. Confirm that the correct modifier group is attached to the intended menu items.

Link modifiers to inventory

Map a sold modifier to the stock component it consumes so theoretical usage and cost reporting remain meaningful.

GO

Menu path
Back Office > Inventory > Inventory Modifiers

1

Select Add Link
Find the required modifier or prefix and choose Add Link. Modifier prefixes may need to be linked separately.

2

Choose the link type
Select the applicable type: Not Inventory Item, Item, Sub Recipe or Menu Item.

3

Select the stock record
Choose the exact inventory item, sub-recipe or menu item and enter the quantity consumed per sale.

4

Link and test
Select Link Modifier. Ring a controlled test and confirm the expected stock movement or theoretical usage.

UNITS MATTER

The quantity is interpreted using the configured inventory unit. Check conversions before linking fractions or portions.

NO-DEPLETION CHOICES

Use Not Inventory Item only when the modifier is intentionally informational and should not reduce stock.

Create an employee

Create an individual user record with the minimum access needed for their job.

GO

Menu path

Back Office > User Management > Users > + New User

1

Enter identity details

Complete first name, last name, email address and language. Use a unique work email where required by your organisation.

2

Choose the POS Initial Screen

Select the appropriate start screen: POS, Table, Bar or Retail, depending on the employee's work area.

3

Assign a unique PIN

Enter a PIN of at least four digits. PINs must be unique and should never be shared between employees.

4

Assign roles

Choose only the approved role or roles. Roles determine access to sensitive functions and reports.

5

Set sign-in access

Enable Sign In only if the employee needs Back Office or Schedule access. Set the required password for a sign-in user, then save.

LEAST PRIVILEGE

Do not grant manager or financial permissions for convenience. Ask an authorised administrator to adjust the role if duties change.

Update or terminate an employee

Edit legitimate changes in place. When employment ends, record the termination and deactivate the account promptly.

GO

Menu path
Back Office > User Management > Users

1

Open the user
Locate the employee, open the user record and verify the name, role and email before making changes.

2

Update access when needed
Change roles, sign-in access or the initial screen only with approval. Select Update to save routine changes.

3

Record termination
In the user form, open Termination Settings between Address and Payroll. Enter the termination date and reason, then select Update.

4

Move the user to Inactive
Return to the user list, open the action menu ..., choose Delete and confirm. The record moves to Inactive rather than being erased.

ACT PROMPTLY

Remove access as soon as authorised. Do not wait for a menu publish cycle; user termination is managed from User Management.

PRESERVE THE RECORD

Do not create a new employee record merely to change a name, email or role. Update the existing record to preserve audit continuity.

Publish and verify changes

Publishing sends saved product and configuration changes to connected POS devices. A successful save is not always the end of the task.

1

Save the record

Select Save or Update on the item, modifier or configuration you changed. Resolve any validation message first.

2

Start Publish

Select the top-right Publish or synchronisation control available in your Back Office.

3

Wait for confirmation

Allow publishing to complete. Do not close the browser or submit the same change repeatedly while it is processing.

4

Check terminal connectivity

The POS must be online to receive current data. If it is offline, restore connectivity and allow synchronisation.

5

Verify the result

Open the relevant screen on the intended terminal. Check price, visibility, tax, modifier behaviour and printer routing as applicable.

PUBLISHING IS NOT VALIDATION

Publishing distributes what was configured; it does not correct an incorrect price, tax setting, recipe or printer assignment.

IF THE CHANGE IS MISSING

Confirm the correct store and device, check online status, then contact inTouch Support before repeating broad edits.

Prepare inventory foundations

Accurate stock control depends on consistent master data. Set up the supporting records before creating inventory items.

1

Categories and subcategories

Create a clear stock classification that supports counting and reporting, such as Food, Beverage, Packaging and Cleaning.

2

Storage locations

Define where stock is physically held. Use names employees can identify during counts and receiving.

3

Vendors

Create approved suppliers with the details your purchasing process requires.

4

In House Units

Confirm the count, recipe and purchase units used by the business and the conversions between them.

5

Ownership

Assign responsibility for maintaining names, units, yields, costs and mappings. Small inconsistencies compound into large variances.

DESIGN BEFORE LOADING

Agree on naming and unit conventions before importing or creating many items. Avoid mixing singular/plural or weight and volume units without conversions.

ONE REAL ITEM, ONE RECORD

Search before creating. Duplicate inventory items split purchases and counts across multiple histories.

Create an inventory item

Create the master record used for purchasing, counting, recipes and theoretical usage.

GO

Menu path

Back Office > Inventory > Inventory Item > + New Inventory Item

1

Enter core details

Add the inventory item name, Inventory Unit, par level, category and subcategory.

2

Choose costing behaviour

Set Calculate COGS on Cost Price according to your accounting policy. Confirm the intended cost basis with the responsible manager.

3

Set storage and tracking

Choose the primary and any secondary storage locations. Enable the tracking options required by your operation.

4

Add vendor and purchase details

Select the vendor and enter SKU or barcode, purchase unit, quantity, price and yield where applicable.

5

Save and review

Save the item. Reopen it and confirm units, conversions, locations and vendor details before it is used in a recipe or purchase order.

UNIT TEST

Check a simple conversion: one purchase unit should produce the expected number of inventory units after yield is applied.

Inventory units, storage & cost

These settings determine how stock quantities and values flow through purchasing, recipes, counts and reports.

1

Inventory unit

Use the unit in which the item is controlled, such as each, gram, kilogram, millilitre or litre. Recipes and counts must be compatible with it.

2

Purchase unit and quantity

Define how the vendor sells the item and how much stock one purchase unit contains, for example one case containing 24 bottles.

3

Yield

Use yield to represent the usable proportion after trim, waste or preparation. Review it when portioning or supplier pack size changes.

4

Primary and secondary storage

Assign locations that match real movement. Transfers and counts are reliable only when stock is recorded in the correct place.

5

Price and COGS

Keep vendor price and costing settings current. Review the impact in Inventory Reports after receiving or recipe changes.

COMMON CAUSE OF VARIANCE

Incorrect pack quantity, unit conversion or yield can create a repeated variance even when physical counts are correct.

CHANGE CONTROL

Unit changes on active items can affect recipes and history. Review linked records before changing an established unit.

Create a sub-recipe

Use a sub-recipe for a prepared component that is produced once and consumed by one or more menu items, such as a sauce, batch mix or garnish kit.

GO

Menu path
Back Office > Inventory > Sub Recipe > + New Sub Recipe

1

Define the batch

Enter the name, unit, produced quantity, yield and price per unit. Choose the primary storage location.

2

Add ingredients

Add each component as an Inventory Item, another Sub Recipe or a Manual Entry, as appropriate.

3

Enter quantities

Record the amount of each ingredient used by one batch. Confirm units and conversions carefully.

4

Add recipe units

Configure additional recipe units where the prepared batch is consumed in a different unit or portion.

5

Save and test

Select Save. Compare the calculated batch cost and yield with the approved recipe card.

OPERATIONAL MATCH

The digital recipe should match the actual preparation method, usable yield and portioning used by the kitchen or bar.

Maintain sub-recipe ingredients

Recipe accuracy is a controlled operational task. Review linked ingredients whenever purchasing units, portions or preparation methods change.

GO

Menu path
Back Office > Inventory > Sub Recipe

1

Open the existing recipe
Select the required sub-recipe and confirm the current batch size, unit and yield before editing ingredients.

2

Update the real change
Adjust the affected ingredient, quantity or recipe unit. Do not compensate for an incorrect inventory conversion by distorting the recipe.

3

Review nested recipes
If another sub-recipe is used as an ingredient, confirm that its own yield and cost are current.

4

Validate cost and yield
Compare the revised calculated result with the approved recipe card or production record.

5

Save and monitor
Save the change and review subsequent Compare Inventory and COGS reports for unexpected movement.

MANUAL ENTRY

Use manual components only under an approved policy; they may not behave like tracked inventory items.

NEVER FIX HISTORY BY GUESSWORK

If an established recipe appears wrong, investigate units, purchases and counts before making a balancing adjustment.

Link menu items to inventory

Connect what is sold at the POS to the ingredients or sub-recipes it should consume.

GO

Menu path

Back Office > Inventory > Inventory Menu Items

1

Find an unlinked menu item

Select the intended menu item from the unlinked list. Check size and sales category to avoid linking the wrong product.

2

Select Link Menu Item

Open the linking action and add the required inventory items or sub-recipes.

3

Enter consumption quantities

Record the quantity depleted by one sale. Use the configured inventory or recipe unit.

4

Save the mapping

Save the link. Review modifier mappings separately where guest choices change consumption.

5

Run a controlled test

Sell one test item, then verify the theoretical usage is sensible. Correct the check using the approved void procedure.

EVERY SIZE IS DIFFERENT

Where portion or serving sizes differ, confirm that each menu item or size consumes the correct quantity.

Adjust inventory or enter a count

Record a verified physical quantity or authorised adjustment with a clear reason.

GO

Menu path

Back Office > Inventory > Adjust Inventory

1

Choose the record type

Open the Inventory Item, Retail Item or Sub-Recipe tab used by your configuration.

2

Select an individual item

Find the stock record and choose Tune for an individual adjustment, or choose + Bulk Adjustment for several records.

3

Enter the available count

Enter the verified Available or Count value in the correct unit and storage context.

4

Select a reason

A reason is mandatory. Choose the most accurate option; add notes when they clarify the cause or your business process requires them.

5

Update and review

Submit the adjustment and confirm the resulting quantity. Investigate material variances rather than repeatedly tuning them away.

COUNT DISCIPLINE

Count consistently by location and unit. Avoid counting the same stock in both primary and secondary storage.

Upload a bulk stock count

Use the system template when many physical quantities must be loaded together.

GO

Menu path
Back Office > Inventory > Adjust Inventory

1

Download the current template
Select Download Template. Use a fresh template for the correct store rather than an old or manually recreated sheet.

2

Enter verified counts
Complete only the intended count fields. Preserve required identifiers and column structure.

3

Quality-check the file
Look for blank required fields, wrong units, duplicate rows and accidental spreadsheet formatting changes.

4

Upload the count
Select Upload Inventory Count and choose the completed file. Review any validation errors before retrying.

5

Confirm the posting
Check sample items and material variances after upload. Keep the approved count sheet according to your audit policy.

DO NOT RESHAPE THE TEMPLATE

Renaming columns, adding formulas or changing identifiers can cause rejection or incorrect mapping.

LARGE VARIANCE

Pause and recount before posting a surprising value. Check location, pack size, unit and recent receipts.

Create templates & purchase orders

Purchases can be organised with recurring vendor templates and formal purchase orders.

GO

Menu path
Back Office > Inventory > Purchases

1

Choose the correct tab
Purchases includes Purchase Templates, Purchase Orders, Purchase Invoices, Received Items and Expired Purchased Item.

2

Build a purchase template
Select the approved vendor and add commonly ordered items with their purchase units. Use the template for repeat ordering.

3

Create the order
Start a purchase order from the required workflow, confirm vendor, items, quantities, prices and expected delivery information.

4

Review before sending
Compare the order with par levels, current stock and approval limits. Correct pack-size or price anomalies.

5

Save and follow approval
Save the order and complete any business-specific approval or supplier communication outside the system as required.

VENDOR CONSISTENCY

The order, delivery and invoice should refer to the same vendor and purchase units. Resolve substitutions explicitly.

Receive purchased stock

Post what was physically received - not simply what was ordered.

GO

Menu path
Back Office > Inventory > Purchases

1

Inspect the delivery
Compare delivered items, quantities, quality and prices with the purchase order and vendor invoice before recording receipt.

2

Receive against an order
Open the applicable purchase order and enter the vendor invoice details, actual received quantities and prices.

3

Record exceptions
Handle shortages, substitutions, rejected goods or price differences according to your purchasing policy.

4

Save the receipt
Save the completed receipt and confirm that stock and purchase records reflect the actual delivery.

5

Receive without a PO when authorised
For an approved manual receipt, open Received Items and select + Receive New Item. Complete the required vendor and item information.

DO NOT COPY THE ORDER BLINDLY

Receiving incorrect quantities or pack sizes distorts on-hand stock and COGS. Use the delivery and invoice as evidence.

Sales & daily reports

Use consistent filters and business dates so reports answer the intended question.

GO

Menu path
Back Office > Reports > Sale

1

Choose a report

Common Sale reports include Menu Item, Sale Recap and Cashier Out. Use the report that matches the control being performed.

2

Set filters

Choose the store, time period and other available filters, then select Apply. Confirm the business date, especially around after-midnight trading.

3

Read context first

Review totals, taxes, discounts, voids, tenders or employee data in the context of the report definition.

4

Use Daily Summary

For a high-level day view, open Reports > Daily Summary and apply the appropriate location and date.

5

Export responsibly

Protect guest and employee information in downloaded or printed reports. Store and share them according to business policy.

RECONCILE LIKE WITH LIKE

A POS business date may differ from the calendar date. Use identical locations, dates and filters when comparing reports.

Inventory & COGS reports

Use Inventory Reports to compare expected movement with actual stock and to review cost of goods sold.

GO

Menu path
Back Office > Reports > Inventory Reports

1

Run Compare Inventory

Select type and time filters. Review beginning, purchases, ideal, actual, variance, wastage, usage, transfers and on-hand values as available.

2

Investigate variance

Check units, receipts, transfers, counts, voids, recipe mappings and yields before making a corrective adjustment.

3

Open COGS

Use the COGS tab and choose COGS Type: Products/Items or Inventory.

4

Confirm period and scope

Use the same store and business-date range when comparing sales and stock reports.

5

Document action

Record the cause and authorised correction for material differences. Re-run the report after changes to confirm the expected result.

VARIANCE IS A SYMPTOM

Do not use stock adjustments as the first response. Repeated variance often points to units, purchasing, recipes, waste recording or counting practice.

Open the day & set tills

The required opening action depends on whether the site uses User Tills, Global Tills or Automatic Global Till.



Menu path
POS > Operations > Till Management



Confirm the configured till model

Use User Till or Global Till only as configured. With Automatic Global Till, a manual opening may not be required.



Open the Till tab

Select the required till and choose Set Till where manual setup is used.



Enter opening cash

Enter the approved opening amount or denominations. Count the float physically; do not copy yesterday's value.



Choose till type

Confirm the correct till type and terminal or owner context, then select Continue.



Verify readiness

Check that the till is open, the correct employee is signed in, printers are online and the POS is synchronised before taking orders.

PERMISSION REQUIRED

Opening, assigning and closing tills are controlled permissions. A manager may need to approve the action.

Void an item or check

Voids should identify what was cancelled and why. They are not a substitute for correcting payments or deleting transactions outside policy.

1

Void an item

Open the check, select the item and choose Void or Options > Void.

2

Choose the reason

If the item was already sent to production, select the accurate predefined reason or enter the required manual reason.

3

Confirm the result

Check that the item is marked or removed as expected and that kitchen communication follows your site's process.

4

Void a whole check

Use the check void option, choose the correct reason and confirm. A paid check may route to the Payment screen and require a different correction.

5

Retain accountability

Use your own PIN and obtain manager approval when required. Review void reporting as part of daily controls.

PAYMENT ALREADY TAKEN

Do not treat a paid check as an ordinary open-check void. Follow the approved reopen and payment-correction process.

Transfer a check or item

Move responsibility or table assignment while preserving the original check and its audit history.

GO

Menu path
POS > Table Layout > Transfer

1

Choose the transfer type
Select Transfer to Server, Transfer to Table or Transfer Item.

2

Select From
Choose the current server or table, then select the correct check. For an item transfer, choose only the intended lines.

3

Select To
Choose the receiving server, table or check. Confirm the destination before proceeding.

4

Complete the transfer
Select Done and approve with a manager PIN if requested.

5

Verify both sides
Open the source and destination to confirm the correct checks or items moved and totals remain accurate.

COMMUNICATE

Tell the receiving server and kitchen or bar when the transfer affects service responsibility or production.

Split or merge checks

Restructure checks before payment. Review discounts and tax behaviour after changing the check structure.

1**Split: confirm no payment**

A check with full or partial payment cannot be split. Open Table Layout > Split and select the required check.

2**Split: move items**

Add a new check, move the intended items, then select Save & Close. Review each resulting total.

3**Merge: select checks**

Open Table Layout > Merge. Select the first check, then the other compatible check or checks.

4**Merge: confirm**

Select Done and confirm. Use a manager PIN if prompted.

5**Recheck billing rules**

Check-level discounts or tax exemption may be removed or recalculated during split or merge. Verify all totals before payment.

PAUSE IF PAID

If any tender has been applied, do not force a split. Correct the payment through the authorised workflow first.

Correct a wrong payment

Correct the tender on the original check only when the payment status and integration rules allow it.

1

Find the closed check

Open the Closed tab and locate the check using the check number and business date. Confirm guest total and tender.

2

Reopen with permission

Select Re-Open Check. A manager permission or PIN may be required.

3

Remove the incorrect tender

On the Payment screen, select the incorrect payment and choose Delete only if the tender can safely be reversed.

4

Process the correct payment

Apply the correct tender and confirm the final receipt and Closed check status.

5

Verify external settlement

For integrated card payments, confirm the void or reversal on the payment device or provider and retain the required receipt.

DO NOT ALTER SETTLED PAYMENTS

Do not delete or adjust a batched card payment or settled online payment. Contact inTouch Support and follow the payment provider's process.

ONLINE ORDERS

Some aggregator or online-order checks cannot be reopened. Escalate rather than attempting a workaround.

Share or adjust tips

Tip sharing must be enabled and governed by the business's approved policy.

GO

Menu path
POS > Operations > Employee > Manual Tip Sharing

1

Confirm the tip pool
Open Manual Tip Sharing and verify the Total Tip to Share for the correct employee and period.

2

Select recipients
Add the eligible employees and allocate the approved values or shares.

3

Reconcile the allocation
Confirm that the distributed amount matches the total available and that no employee is omitted or duplicated.

4

Save
Select Save & Close and retain any manager approval required by your policy.

5

Use Back Office adjustments carefully
Where authorised, tip corrections can be managed under User Management > Tip Adjustment.
Record the reason and supporting evidence.

POLICY AND LAW

Tip allocation rules can be regulated and employment-sensitive. Follow approved local policy; the software workflow does not determine entitlement.

Cash up & cashier out

Complete checks and tills before signing employees out of the business day.

GO

Menu path
POS > Operations > Till Management > Reports

1

Clear active work

Complete or transfer all active checks for the cashier. Confirm tips and unresolved payments.

2

Close or declare the till

Count the physical cash and complete the configured till close or declaration process. Record discrepancy notes where required.

3

Run the cashier report

In Reports, select the cashier or till and generate or print the required report.

4

Cashier Out

Select Cashier Out. The system can block the action while an active till or open check remains.

5

Reconcile and repeat

Compare tender totals, cash, over/short and supporting documents. Repeat for each staff member according to site procedure.

NEVER FORCE A BALANCE

Investigate discrepancies. Do not alter checks, payments or counts merely to make the cash-up total match.

Close the business day

Close Day validates that operational activity is complete before the business date is finalised.

GO

Menu path
POS > Operations > Close Day

1

Prepare
Close active checks, cashiers and tills. Resolve offline transactions, untipped checks and disconnected devices where applicable.

2

Choose the business date
Open Close Day, select the correct business date and review the displayed status.

3

Close remaining cashiers if permitted
Use Close All Cashiers only when authorised and after confirming their work is complete.

4

Start closure
Select Close The Day. The checklist validates active checks, open tills, open cashiers, offline activity or devices, and untipped transactions.

5

Resolve, submit and retain
Correct failed checklist items, then submit the close. Print or save the required closing report.

DO NOT BYPASS OFFLINE ACTIVITY

Unsent transactions can affect settlement and reporting. Restore connectivity and synchronise before closing where the checklist requires it.

Software updates

Keep uPOS supported without risking trading data, printer connectivity or payment integration.

1

Confirm the approved release

Ask inTouch Support which update or installation method applies to your device and site.

2

Prepare the terminal

Complete payments, save open work, confirm synchronisation and resolve offline transactions. Schedule the work outside trading hours.

3

Web POS

Google Chrome normally updates automatically. A Web POS interface plug-in update may be needed for printers or payments only when instructed.

4

Native iPad or Android

Use the approved distribution or store method advised by inTouch Support. Do not uninstall the live app unless explicitly instructed.

5

Test after update

Sign in, confirm data synchronisation, run a printer test and verify the payment device before returning the terminal to service.

STOP BEFORE REINSTALLING

Reinstallation can remove local settings or unsynchronised data. Call 010 595 0002 before reinstalling or clearing app data.

Network & offline checks

Identify whether the issue is the internet connection, local network, one terminal or the POS service before restarting equipment.

1

Observe the scope

Check the POS online/offline indicator and whether another approved website or terminal works. Note which devices are affected.

2

Inspect connections

Check Ethernet or Wi-Fi, router and network-switch power, and visible cable damage. Do not move labelled network cables without approval.

3

Protect transactions

Finish or confirm any payment already in progress. In offline mode, reporting, audit, Close Day, refunds or integrations may be limited.

4

Restart one device at a time

If authorised, restart the affected terminal or network device and allow it to reconnect fully before testing.

5

Synchronise and escalate

When service returns, allow offline activity to synchronise. If the issue persists, contact inTouch Support with times, devices and error messages.

NEVER POWER-CYCLE DURING A PAYMENT

First confirm the result on the payment device and provider. Repeating a card transaction can create duplicate charges.

Printer checks

Use a simple physical-to-software sequence to isolate receipt and kitchen printer faults.

GO

Menu path
POS > Operation > Hardware Settings > Printer Settings

1

Physical check

Confirm power, paper, cover latch and cables. Clear a paper jam according to the printer manufacturer's instructions.

2

Check Printer Settings

Review Online/Offline status, printer name and IP address. Select the correct configured printer.

3

Confirm connection type

Use the USB Receipt Printer option only for a USB-connected receipt printer. Local IP printers should be reachable on the same network.

4

Test and reprint

Run the available test, then reprint a controlled receipt or kitchen ticket. Confirm the correct template and routing.

5

Escalate with evidence

Record the printer name, IP, terminal, error message and whether other printers work before contacting Support.

CLEANING SAFETY

Do not use liquids or compressed air unless the printer manufacturer approves it. Power off before handling paper-path components.

Terminal performance & support

Resolve common slowness safely and give Support the information needed to help quickly.

1**Stabilise the device**

Complete active payments, then restart the affected terminal if authorised. Close unused browser tabs or background applications.

2**Check the supported baseline**

Current guidance lists Windows 11 with Chrome and 8 GB RAM for Windows, or Android 11+ with 4 GB RAM for Android devices.

3**Update Chrome**

For Web POS, install an approved Chrome update outside trading hours and retest the workflow.

4**Preserve saved data**

Do not delete all browser data, passwords or autofill. If Support instructs cache clearing, remove only cached images and files as directed.

5**Contact inTouch Support**

Call 010 595 0002 or email service@intouchpos.co.za. Provide the store, terminal, time, user, check number and exact error.

SUPPORT-READY DETAILS

A photo or screenshot of the full error, plus steps already tried, is usually more useful than a general description such as 'POS is slow'.