“The software and support are just fantastic. We highly endorse their products and service.”
Louisa, Kaneohe Shell (Kaneohe, HI)

“Insight Retail Software is a cherished partner. We highly recommend backOffice to any of our customers looking for software for their convenience store. They know how to make software work.”
Pat, Dayles Sheehan (Missoula, MT)

“We highly endorse Insight. The software works great and the support staff is a pleasure to work with.”
Jeff, Yellowstone National Park (Gardiner, MT)

“We run our 6 large stores using Insight’s complete POS system. We are able to manage the entire operation from our main office. It works for us, and we rely on it every day.”
Adam, Atlantic City Beauty Supply (Atlantic City, NJ)

“I use Insight software to manage our 16 stores. I am able to manage all the stores from our central warehouse including full inventory. The software is really reliable.”
Rick, Christies Toy Box (Oklahoma City, OK)

Over 1,000 installs and over 25 years in retail experience!
Pricebook Module

Control of product pricing in retail stores is vital. Studies have shown scanning and price control can lead to a 4% or more increase in profits by reducing mistakes when compared to a manual system. InsightRS's backOffice™ Pricebook, offers an extensive set of features and capabilities and makes management of products easy, accurate and efficient. Do better with the Pricebook module.

### Edit products

#### Alternate PLU
Unlimited number of secondary PLUs.

#### User-Defined Lists
Create up to five of your own lists to enhance product definition. These fields can be used throughout the software while selecting products for orders, adjustments, reports, group change and promotions.

#### Promotions
Displays promotion detail if the item is on an active promotion.

#### Copy Values/Paste Values
Saves you hours of retyping. Now adding the hot new soda with 10 different flavors takes almost no time. You enter the first item then Copy Values/Paste Values to stamp out the rest.

#### Repackaging and Kits
backOffice™ can automatically reduce quantity on hand of one product when another sells. This is ideal for products like cigarettes, beer, soda and gift baskets.

#### Vendor information
Allows unlimited number of vendors and each vendors' unique reorder number per item.

### Edit store prices

Includes many features to make changing prices at multiple stores easy and accurate. Data from any field can be copied to all stores or store groups. Store groups can be defined as needed to simplify managing stores with similarities.
Promotions

Stores
Build promotions for single, multiple or groups of stores saving time and increasing accuracy. Each item in the promotion can have a different price for each store.

Start/End Date and Time
Promotions can automatically begin and end according to date settings. Regular prices can be changed while the promotion is active enhancing flexibility.

Adding Multiple Items
Groups of items can be added to the promotions at once using our flexible and easy to use multi-select feature.

Promotion Pricing
Promotion prices and flags can be changed for each item individually or in groups using Multi Select. Prices can be manually entered or calculated based on margin, markup or any percentage. You can also replace the last digit with a "retail number" such as 5 or 9 after the percentage calculation.

Multi Select & Group Change

Our incredible easy to use Multi Select is used throughout the software to choose products for inclusion in reports, orders, group change and promotions. This feature is extraordinarily flexible and useful and takes full advantage of all of the available fields in the database such as brand, size, department, vendor, price, cost, and many others.

Group change allows you to set pricing, reorder levels, brand, size and user defined fields for any item or group of items in the database. This is particularly useful for groups of items whose prices frequently change such as cigarettes, candy and soda.
Reporting Module

Reporting is fundamentally one of the most important features of inventory software. backOffice™ meets this need head-on with an extensive set of features and capabilities providing reports that are informative and incredibly usable. More than 23 years of retail software experience has lead to an unparalleled level of reporting flexibility that will help your business succeed.

Flexible Reporting Capabilities

Available Report Types
- Item Sales History - 4 Formats may be saved to User Defined Reports
- Daily Sales - May be formatted to include your necessary accounting data
- Item Stock Status - 7 Formats
- Reorder and Purchase History Report
- Inventory Variance – Can repackage values up or down
- Price and Cost Change History
- Price Lists - 5 Formats
- General Lists
- Barcode Labels - Print to laser or thermal barcode printers in many sizes

Options
- Date Range - Run over any date range or using convenient preset periods
- Store Consolidation - Individual, comparison or consolidated
- Sort By - Sort on most fields on report, ascending or descending
- Group By - Group on many fields and show/hide summary and group detail
- Printing Options - View reports on screen, print to paper or export to Excel

Complete Profit Analysis

<table>
<thead>
<tr>
<th>Product #</th>
<th>Brand</th>
<th>Description</th>
<th>Size</th>
<th>Qty/Hand</th>
<th>Qty/Sold</th>
<th>Amt Sold</th>
<th>Cost Sold</th>
<th>Profit</th>
<th>Margin</th>
</tr>
</thead>
<tbody>
<tr>
<td>490000044</td>
<td>COKE 20 OZ</td>
<td>CONSOLIDATED BTL</td>
<td>2002 BTL</td>
<td>90.00</td>
<td>1,470.00</td>
<td>$2,192.78</td>
<td>$1,466.91</td>
<td>$725.87</td>
<td>33.10%</td>
</tr>
</tbody>
</table>

Period Analysis

<table>
<thead>
<tr>
<th>Product #</th>
<th>Description</th>
<th>Brand</th>
<th>Size</th>
<th>Period 1</th>
<th>Period 2</th>
<th>% chg</th>
<th>Period 1</th>
<th>Period 2</th>
<th>% chg</th>
<th>Period 1</th>
<th>Period 2</th>
<th>% chg</th>
</tr>
</thead>
<tbody>
<tr>
<td>490000044</td>
<td>COKE 20 OZ</td>
<td>CONSOLIDATED BTL</td>
<td>2002 BTL</td>
<td>107.00</td>
<td>139.00</td>
<td>29.91%</td>
<td>$154.43</td>
<td>$200.15</td>
<td>29.91%</td>
<td>$47.65</td>
<td>$61.44</td>
<td>28.93%</td>
</tr>
</tbody>
</table>
### 13 Month Comparison

<table>
<thead>
<tr>
<th>Product #</th>
<th>Description</th>
<th>Qty</th>
<th>M1</th>
<th>M2</th>
<th>M3</th>
<th>M4</th>
<th>M5</th>
<th>M6</th>
<th>M7</th>
<th>M8</th>
<th>M9</th>
<th>M10</th>
<th>M11</th>
<th>M12</th>
<th>M13</th>
<th>Sales Amt</th>
<th>Profit Amt</th>
<th>Margin</th>
</tr>
</thead>
<tbody>
<tr>
<td>490000004</td>
<td>COKE 20 OZ</td>
<td>55.00</td>
<td>69.00</td>
<td>70.00</td>
<td>32.00</td>
<td>37.00</td>
<td>150.00</td>
<td>152.00</td>
<td>102.00</td>
<td>107.00</td>
<td>139.00</td>
<td>112.00</td>
<td>121.00</td>
<td>67.00</td>
<td>$2,001.71</td>
<td>$655.54</td>
<td>32.75%</td>
<td></td>
</tr>
</tbody>
</table>

### Daily Sales

**All Polls for "INSIGHT 1" from 02-28-2011 to 03-01-2013**

<table>
<thead>
<tr>
<th>Description</th>
<th>Qty</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEDIAS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CASH</td>
<td>182,259.00</td>
<td>139,381.67</td>
</tr>
<tr>
<td>CHARGE</td>
<td>54,955.00</td>
<td>2,256,081.75</td>
</tr>
<tr>
<td>DEBIT</td>
<td>31,021.00</td>
<td>809,365.26</td>
</tr>
<tr>
<td>TOTAL MEDIAS</td>
<td>268,235.00</td>
<td>$3,214,628.68</td>
</tr>
</tbody>
</table>

**DEPARTMENT SALES**

<table>
<thead>
<tr>
<th>Description</th>
<th>Qty</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>CIGARETTES</td>
<td>32,962.00</td>
<td>257,247.28</td>
</tr>
<tr>
<td>TOBACCO</td>
<td>10,641.00</td>
<td>57,489.80</td>
</tr>
<tr>
<td>SODA</td>
<td>58,691.00</td>
<td>93,525.78</td>
</tr>
</tbody>
</table>

### Complete Inventory Status

<table>
<thead>
<tr>
<th>Product #</th>
<th>ReOrder #</th>
<th>Description</th>
<th>Brand</th>
<th>Size</th>
<th>On Hand</th>
<th>Current Cost</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>490000004</td>
<td>6230</td>
<td>COKE 20 OZ</td>
<td>COKE</td>
<td>20 OZ BTL</td>
<td>90</td>
<td>1.00</td>
<td>08.01</td>
</tr>
</tbody>
</table>

### Reorder Report

<table>
<thead>
<tr>
<th>Product #</th>
<th>ReOrder #</th>
<th>Description</th>
<th>Brand</th>
<th>Size</th>
<th>Min Lvl</th>
<th>Max Lvl</th>
<th>Desired Lvl</th>
<th>Qty/Hand</th>
<th>Qty Sold</th>
<th>Reorder Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>490000004</td>
<td>6230</td>
<td>COKE 20 OZ</td>
<td>COKE</td>
<td>20 OZ BTL</td>
<td>5</td>
<td>43</td>
<td>30</td>
<td>90</td>
<td>123</td>
<td>REORDER 33</td>
</tr>
</tbody>
</table>

### Price List With Cost

<table>
<thead>
<tr>
<th>Product #</th>
<th>Vendor #</th>
<th>Description</th>
<th>Brand</th>
<th>Size</th>
<th>Price</th>
<th>Cost</th>
<th>Margin, %</th>
<th>Markup, %</th>
</tr>
</thead>
<tbody>
<tr>
<td>490000004</td>
<td>6230</td>
<td>COKE 20 OZ</td>
<td>COKE</td>
<td>20 OZ BTL</td>
<td>1.69</td>
<td>1.00</td>
<td>40.96%</td>
<td>69.35%</td>
</tr>
</tbody>
</table>

### Price Change History

<table>
<thead>
<tr>
<th>Product #</th>
<th>Vendor #</th>
<th>Description</th>
<th>Brand</th>
<th>Size</th>
<th>Change Type</th>
<th>Old Price</th>
<th>New Price</th>
<th>Cost</th>
<th>Margin, %</th>
<th>Markup, %</th>
</tr>
</thead>
<tbody>
<tr>
<td>490000004</td>
<td>6230</td>
<td>COKE 20 OZ</td>
<td>COKE</td>
<td>20 OZ BTL</td>
<td>Edit Products</td>
<td>1.59</td>
<td>1.69</td>
<td>0.00</td>
<td>40.96%</td>
<td>69.35%</td>
</tr>
<tr>
<td>6230</td>
<td>490000004</td>
<td>COKE 20 OZ</td>
<td>COKE</td>
<td>20 OZ BTL</td>
<td>A</td>
<td>3/7/2011 4:41:32 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Inventory Module

Strategic, efficient and accurate ordering and the careful tracking of inventory levels are vital to a retail store’s success. Stocking just the right amount of high-demand, high-margin, high-turnover products while minimizing shrink due to customer and employee theft are easily accomplished with the backOffice™ Inventory Module.

Edit orders

Order features
Products may be added to the order one at a time or in groups using the multi-select feature. Delete 0 Qty will remove all items that are not being ordered while Clear Totals erases all qty ordered and cost values entered so that you can “start over.”

Back-order
backOffice™ allows items that were not received to be put on back-ordered. Items that were received may be posted to inventory and the back-ordered items can be received and posted later.

Informative item detail
Insight provides complete information for each item on the order giving the information you need to make better buying decisions.

Unlimited sorting
Orders may be sorted on any field which makes managing a large order easy.

Automatic reordering

Consumption based ordering
Orders can be generated comparing average or actual sales values over any date range to the current quantity on hand. Using sales history to order will allow you to keep stock at optimum levels to meet demand.

Powerful automated ordering capabilities
Quantity to order may be automatically generated using minimum, maximum, desired or quantity sold levels. The repack feature makes ordering multi-pack items like cigarettes easy. For example, the repack feature will add the on-hand and quantity sold values of packs into the carton values so that the cartons will be automatically ordered including the pack values.
**Edit inventory Adjustment**

![Image of Edit inventory Adjustment](image)

**Edit quantity**
backOffice™ automatically calculates the value of the adjustment quantity based on which field a value is entered. The current cost from the database is entered into the cost field automatically but may be overwritten if the cost has changed.

**Flexible adjustment features**
Products may be added to an adjustment one at a time or in groups using the multi-select feature. ‘Delete-0-Qty’ will remove all items that are not being adjusted. Set 0 Qty will automatically calculate the value necessary to reset the inventory level for each item in the adjustment to 0. This feature is particularly useful when doing a complete physical where some items may be temporarily out of stock.

**Variance reporting**
backOffice™ offers a variance report which calculates the difference between the quantity on-hand in the software and the actual physical count in the store. The report highlights the variances of each item by both quantity and dollar value.

**Handheld Support**

**Support for RF and Batch Mode Handhelds**
backOffice™ offers complete handheld support by offering price verification, price and cost change and quantity capture for inventory and orders with the WorthData LT7000, price and cost changes take place immediately in the backOffice™ database as they are entered on the handheld.

**RF Unit offers total flexibility**
- Add items
- Change price
- Change cost
- Create an order
- Receive an order
- Count inventory in store
- Create variance report

**Batch Units offers**
- Create an order
- Receive an order
- Count inventory in store
- Create variance report
## EDI Module

Maintaining margins, controlling costs and saving time are vital to profitability. Our EDI Module helps you meet these demands head-on. Import electronic invoices from your suppliers and let our EDI grid through the use of colors show you immediately where changes have occurred so you can take action. New items are created automatically saving enormous amounts of time. Quantities received can be sent to a purchase order so on-hand levels are updated.

### Data Exchange

The data exchange is used to import electronic invoices from vendors into the EDI grid. Multiple vendors can be setup in the exchange so that virtually any vendor’s files can be used. Data from handheld units or other data collection devices can be mapped.
Price Book and Inventory Maintenance

Create New Products
When a vendor's invoice is imported via the data exchange, the EDI grid is populated with both new and matching products. Color codes are used to quickly highlight new items or items whose margin have changed due to a price or cost change. A filter can be applied to populate the grid with only desired changes. Unchanged items can be eliminated from the grid. New items can be isolated so that department and other information can be set at once. Once posted, the new items are added to the database and ready to be sent to the POS.

<table>
<thead>
<tr>
<th>No Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>Margin Reduced</td>
</tr>
<tr>
<td><img src="image2.png" alt="Image" /></td>
</tr>
<tr>
<td>Margin Increased</td>
</tr>
<tr>
<td><img src="image3.png" alt="Image" /></td>
</tr>
<tr>
<td>New Item</td>
</tr>
<tr>
<td><img src="image4.png" alt="Image" /></td>
</tr>
</tbody>
</table>

Change Price/Cost for existing products
If the vendor includes retail prices in their EDI file based on agreed-upon margins, this data can be used to update prices in the pricebook. Tools to calculate prices based on a desired margin are also available. Prior to posting, pricing may be manipulated inside of the EDI grid giving the user complete control. Any items that need to be left unchanged can either be removed from the grid, or if prices need to be untouched but cost updated, a copy prices feature will copy the current price into the new price field. This is very useful for tobacco products where the vendor does not maintain retail prices or pricing is region-based.

Post changes to Pricebook and Inventory
When work has been completed in the EDI grid, the user can elect to post those changes to the Price book and create a Purchase Order in the Inventory Module. The Purchase Order can be checked against a packing list and then posted, updating cost, quantity on hand and the purchase history.
Fuel Manager

The Fuel Manager is a purpose-built module designed to help you maximize profits from the petroleum side of the operation. A Fuel List window provides sales, margin and profit for fuel grades. Totals are summarized by month or can be viewed by day. The Fuel List eliminates the need to manually track fuel information via a spreadsheet saving time and improving accuracy. Tank volume levels are displayed numerically as well as in gauge form with user-definable color schemes.

Fuel purchases, adjustments and stick readings are entered to provide both inventory and cost control. Fuel sales and activity reports, which can be run over any date range, provide the information you need to improve purchasing and pricing decisions.

Fuel List

![Fuel List](image.png)
Fuel Delivery

Record Deliveries
Fuel deliveries are posted by tank/grade including volume and cost. Cost changes are recorded so that pool margin and profit by grade are automatically calculated. The purchase history is displayed in the Fuel List for immediate retrieval.

Tank Monitoring
Quickly monitor tank levels
Tank levels are automatically calculated during the sales import process and are adjusted via deliveries, adjustments and stick readings. Alert levels can be set to help you quickly see if a volume is low in any tank.

Fuel Sales Report

<table>
<thead>
<tr>
<th>Date</th>
<th>Sales Volume</th>
<th>Purchase Cost</th>
<th>Sales Amount</th>
<th>Margin</th>
<th>Profit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wed 04/01/15</td>
<td>120.79</td>
<td>$299.43</td>
<td>$318.75</td>
<td>6.08%</td>
<td>$19.32</td>
</tr>
<tr>
<td>Thu 04/02/15</td>
<td>110.29</td>
<td>$273.41</td>
<td>$291.06</td>
<td>6.08%</td>
<td>$17.85</td>
</tr>
<tr>
<td>E10 Sub Total</td>
<td>231.08</td>
<td>$572.84</td>
<td>$609.81</td>
<td>6.00%</td>
<td>$36.97</td>
</tr>
</tbody>
</table>

Fuel Activity Report

<table>
<thead>
<tr>
<th>Date</th>
<th>Delivery Volume</th>
<th>Delivery Cost</th>
<th>Stick Reading</th>
<th>Sales Volume</th>
<th>Purchase Cost</th>
<th>Sales Amount</th>
<th>Margin</th>
<th>Profit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wed 04/01/15</td>
<td>553.00</td>
<td>$2.48</td>
<td></td>
<td>120.79</td>
<td>$299.43</td>
<td>$318.75</td>
<td>6.06%</td>
<td>$19.32</td>
</tr>
<tr>
<td>Thu 04/02/15</td>
<td>110.29</td>
<td>$273.41</td>
<td></td>
<td>110.29</td>
<td>$291.06</td>
<td>6.06%</td>
<td>$17.85</td>
<td></td>
</tr>
<tr>
<td>E10 Sub Total</td>
<td>231.08</td>
<td>$572.84</td>
<td></td>
<td>231.08</td>
<td>$609.81</td>
<td>6.00%</td>
<td>$36.97</td>
<td></td>
</tr>
</tbody>
</table>
backOffice™ Pricebook

- **Unlimited PLU capability** - limited only by POS device
- **5 user defined fields** - name the field, put any entries in the field you wish
- **User defined product groups** - name a product group, put any item in it you wish
- **Multiple vendors per item** - allows different vendor for each store on same product
- **Automatically calculate price** - based on margin or markup
- **Kits** - will automatically reduce qty on hand of items in kit when kit is sold - great for gift baskets
- **Packages** - will automatically reduce qty on hand of master item as child items are sold - great for cigarettes, beer and soda.
- **Multi-store pricing** - control prices for each store or store groups independently, or copy values to all automatically
- **User defined store groups** - name a store group, put any store in it you wish, use group later for reports, orders etc.

backOffice™ Reporting

- **Maintains history daily** - limited only by storage space
- **Generate reports** over any date range
- **Predefined report ranges** - save time in selecting frequently used date ranges
- **Save predefined report settings** - save specific report parameters for later use
- **Export reports** to Excel
- **Daily booking report**
- **Item sales history reports**
- **inventory status reports**
- **inventory variance reports**
- **Price lists**
- **General lists**
- **Purchase history report**
- **Barcode Label Printing**

backOffice™ Inventory

- **Track stock** with average or current costing
- **Levels can go negative** and be caught up later
- **Computer assisted ordering** - order on min, max, desired, or using calculated sales values (average or periodic)
- **Receive and transmit orders electronically** or with handheld unit - customizable interface for vendors
- **Order/receive stock using handheld unit**
- **Back-order and on-order tracking**
- **Order/receive products using product number** or vendor re-order number

General features

- **User security** - log-on based, allows/disallows access to all parts of the software
- **Microsoft SQL Server Database** - Microsoft SQL Server database is scalable from one to hundreds of stores.
- **Multi-user capable** - run on a network with peer-to-peer or server-based topology
- **Detailed on-line help**

Compatible Hardware & Software

- **PC-Based Point-of-Sale**
  - NCC Reflection POS (embedded or Microsoft Windows™ version)
- **Electronic Cash Registers**
  - Sam4S SPS500, SPS300
  - Datasym ElxiXR, XR651/650
- **Gas Pump Controllers**
  - Verifone Ruby, Ruby CI, Ruby 2
  - Sapphire, Commander
  - Gilbarco Passport
  - NCR Radiant RPOS
- **Handheld Terminals**
  - Worthington 7000 Series RF Terminal
  - Unitech HT630
  - Any Windows/embedded unit using iKey software
  - Any batch mode terminal that produces CSV file
- **Barcode Printers**
  - GoDex DT4+, 700i
  - Eltron/Zebra 4" ELP2 compatible
  - Cognitive 4" Blaster or DelSol
  - Laser printer with Avery 5160 or 5267 labels

System requirements

- **Processor**: 2.0 GHz or faster, Dual Core
- **Memory**: Minimum 4 GB, recommended 8 GB
- **Hard Drive**: Minimum 1 GB free space
- **Operating System**: Microsoft Windows Vista SP 2, Windows 7 SP1, Windows 8 SP1, Windows 8.1