iVend Retail 6.5 Update 4 - Management Console

User Manual

Version: 6.5 Update 4

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Introduction

iVend Management Console is installed on the home office and store servers (optional). With iVend Management Console, you can:

Setup the master data required to conduct transactions in the POS register.

In addition, various administrative settings can be made that affect which and how transactions may be conducted.

Perform the Inventory transactions.

The settings and data to be setup are categorized in the following modules:

1. Administration
2. Operations
3. Reports
4. Search

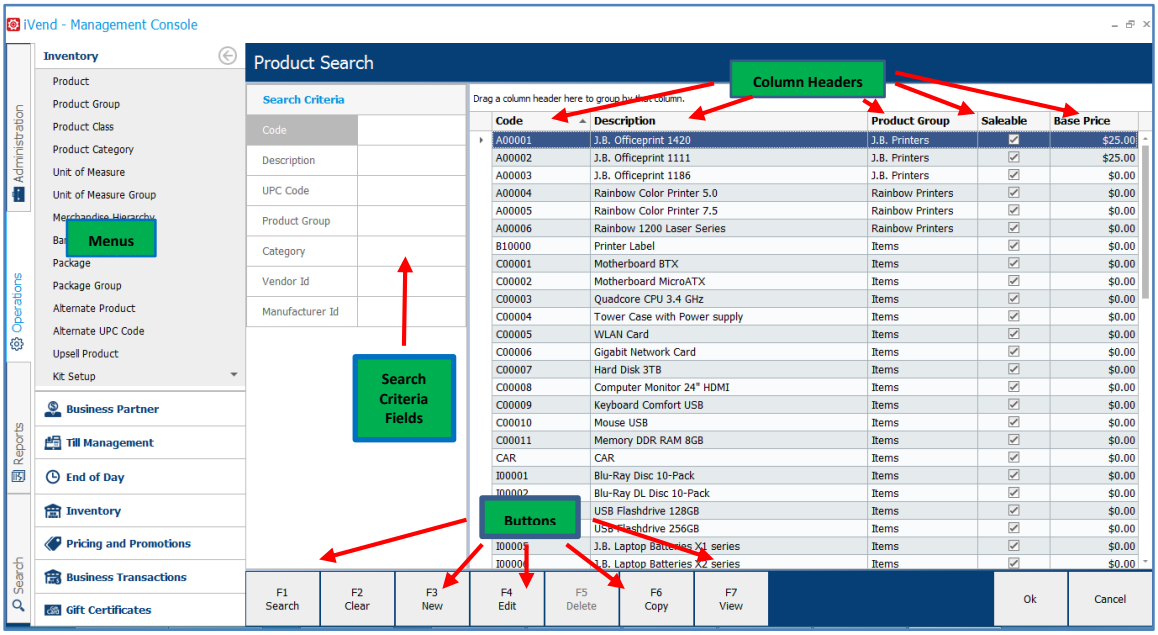
Prerequisites

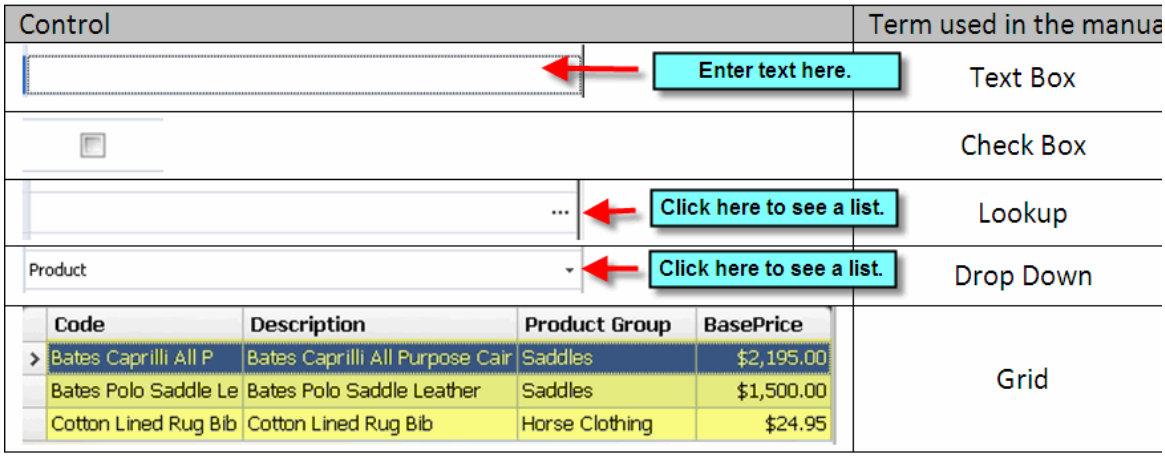
In order to start using iVend Management Console, the connection to the SQL Server must be specified using the Connection Manager.

The following sections of this document capture the functionality of each option available in the application.

The Management Console Screen

The following terms are used throughout the manual:





Fields with the icon denote mandatory fields.

Click icon to collapse a section in the screen.

Click icon to expand a section in the screen.

Using a Search Screen

Several opportunities are presented to use a search screen that includes search criteria fields and columns of information. The following describes the ways to use those features.

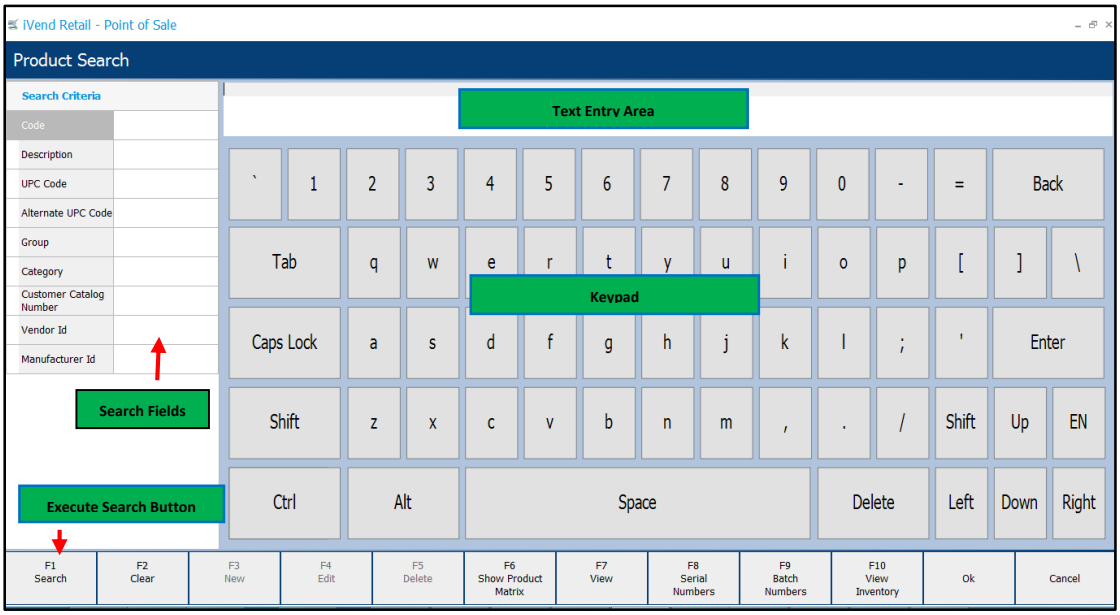


Figure 1 - Sample Search Screen

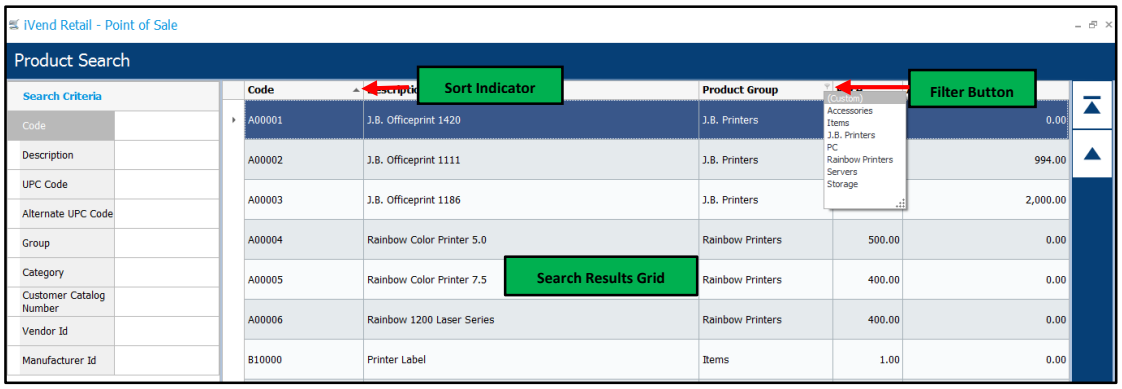


Figure 2 - Sample Search Screen

Search Screen Details

For most of the sub modules in Management Console, the search screen appears on selecting the sub module from the menu. Given below are the common fields in the search screen:

Field	Description/Activity
F1: Search	Displays the content in the search results grid. If no search criteria is specified and the **Search** button is clicked, all the rows for the Search screen are displayed.
F2: Clear	Clears the selection in the search results grid.
F3: New	Allows defining the content according to the selected option.
F4: Edit	Allows editing the content according to the selected option.
F5: Delete	Deletes the content of the selected row in the search results grid. Clicking the Delete button, system prompts a confirmation message. The user can select multiple rows and then delete all of them at once. This button is disabled for the search screen of the following sub modules: Country State Tax Code Shipping Type Warehouse Currency Product Product Group Manufacturer Price List Customer Customer Group Customer Catalog

	Vendor Special Price List Group Discount
F6: Copy	This button copies the content of the selected row in the search results grid to the Setup screen. For example, pressing **F6** when a product is selected in the search result grid, a new product master screen opens with data copied from the selected item.
F7: View	The button displays a new screen in the Read-only mode.
[OK]	The button closes the screen.
[Cancel]	The button closes the screen.

Logging into Management Console

To run the Management Console application, double-click the Management Console shortcut icon or run it from the Start menu. The Initialization screen appears follow by a screen saver while opening the application. User can log-in to iVend Management Console using following options:

- **Electronic ID:** Swipe the electronic card which will automatically log-in the user into the system.

  This feature is available only when the Electronic ID has been setup with the machine.

- **Biometric Login:** Click on the screen saver or press any key to display the “Login” screen. As "Login" screen appears, place the finger over the reader. After successful authentication using fingerprint credential user loges into the system.

  This feature is available only when the Fingerprint Reader has been setup with the machine.

- **Username & Password:** Click on the screen saver or press any key to display the “Login” screen. Enter the user name and password as setup in “Security User” (Administration --> Authorization --> Security User) option of the Management Console and click “Login”.

  The first time when a user logs into Management Console, user can use the default user name and password. Default user name and password is set to 1 in iVend.

The details of the login screen are as follows:

Field	Description/Activity
User Name	Enter the user name.
Password	Enter the password.
Login	Click the button to log into the system.
Cancel	Click the button to close the screen.
Change Password	Click the button to change the password for the user name entered.

Administration

The administration module has the following sub modules:

System Initialization
- Enterprise
- Communication Settings
- System Display Settings
- Country
- State
- Zip Code
- Message
- Document Number Series
- Export Confiiguration Package
- Exit

Application Setup
- Search Grid Definition
- Search Grid Column Definition
- POS Transaction Info Grid
- Report Manager
- User Defined Fields
- Validation Rules
- Property Caption Setup
- Email SMS Template
- Schedule Manager
- Import Data
  - Alert Notification Setup
  - Alert Notification View
- Export Data
- Alert Notification View
- Alert Notification Setup

Financial
- Currency
- Exchange Rate
- Payment Type
- Tax Code
- Tax Events
- Tax Condition Setup
- Surcharge
- Bank

Retail Configuration
- Retail Profile
- Subsidiary
- Warehouse
- Store Group
- Store

Enterprise

In order to start using iVend application, the enterprise details need to be setup first. The enterprise details include the company name and address, tax codes, warehouse, retail profile etc.

To open the screen, choose *Administration > System Initialization > Enterprise*.

Enterprise Settings Screen

Field	Description/Activity
General	
Company Name	Enter the name of company. A name of maximum 50 alphanumeric characters can be entered.
Email	Enter the email of company.
Address	Displays the address of company. Click *[...]* to open the address screen and enter the company's address details.
ERP System Type	Select the ERP System with which the user wants to integrate iVend. The field is not editable once the ERP system is selected and the value is saved in the database.
Localization Type	This field enables the user to identify the iVend localization. Based on the selected Localization the business rules may change in the system. The field is not editable once the localization is selected and the value is saved in database.
Sales Tax Code	Select a code from the list of tax codes available. Click [...] to open the *Tax Code* Search screen and select the code. Separate tax codes for purchase and sales are required for countries like Australia and UK where input and output taxes are used. For other countries, the same tax code can be specified for both purchase and sale.
Purchase Tax Code	Select a code from the list of available tax codes. Click [...] to open the *Tax Code* Search screen and select the code.
Federal Tax ID	Enter the Federal Tax ID that can be maximum of 50 characters long.
Retail Profile	Select a profile from the list of retail profiles. Click [...] to open the Retail Profile search screen and select the profile. To add a new profile, press F3 or click on the [F3 New] button in the *Retail Profile search* screen.

Allow Negative Inventory	Select this to allow the user at POS to make a sales transaction for a product that is out of stock as per system records. This field does not integrate back to the *SAP Business One > System Initialization > Document Settings > Block Negative Inventory* field and this needs to be maintained manually,
Culture Info	This drop-down allows user to set the culture information for the application.
Global Settings	
Check Credit Limit	Select the option if the customer's credit limit needs to be checked when an *On Account* payment is being made by the customer at the POS.
Show Products By Vendor	Select this check box if user wants to see the products supplied by the selected vendor in purchasing documents like Purchase Order.
Allow Price Change While GRPO	Select this check box if you would like to allow users to change the price of an item while doing a goods receipt against a purchase order.
Pricing Resolution	This will capture the resolution of the price and discount coming from the pricing engine. Valid values are: **None**: Calculate the price based on the pricing resolution. **ResolvedToLowest**: If there is more than one valid price on the product then system would calculate the lowest price out of all the prices and would show that price at POS. **ResolvedToHighest**: If there are more than one valid price on the product then system would calculate the highest price out of all the prices and would show that price at POS.
Apply Sale Discount On – Transaction Total After Tax	If this flag is checked then system will apply the same level discount on the Sale Total After Tax else, the system will apply the same discount on Sale Total Before Tax. For example: Sale Total Before Tax (A)= $100 Tax Percent (B)= 10% Sale Discount (C) = $10 **Scenario 1:** Sale Discount On Sale Total After Tax Sale Total Before Discount (D)= A + (A*(B)/100) = 110 Sale Total = D – C = 110 – 10 = 100 **Scenario 2:** Sale Discount On Sale Total Before Tax Sale Total Before Discount (D) = A – C = 100 – 10 = 90 Sale Total = D + (D*B/100) = 99

Support For Multiple Transaction Type Mode	This setting gives the flexibility to the user to setup the POS system for allowing multiple transaction types in a single transaction. For example, you can do the sales and sale refunds in s single transaction. Set this flag if you want to allow cashier to do multiple types of transaction in a single transaction at POS.
Allow Multiple Sales Person on Transaction Item	By default, iVend gives you an option to select only one sales person for each transaction line in POS. However, setting this flag user can setup the system to define more than one sales person per transaction item. While selecting more than one sales person, system also gives an option to distribute the commissions for that particular sale item. If the system is setup to select multiple sales person per transaction item, then due to limitation of SAP Business One, only one of the selected sales person would be integrated with SAP Business One for each transaction item.
Open Sales Attribute Automatically	Sales Attribute is the way of collecting extra information of the customer on the sale. Like capturing the Phone No, or the Zip Code of the walk-in customer. This sales attribute screen can be set to open automatically on every transaction or can be made optional so that whenever it is required the cashier can collect this information.
Collect Entire Sale Order Amount in Advance	If this is selected then store manager can force the cashier to collect entire sale order amount in advance i.e. at the time of order booking. This setting is extremely beneficial for those who collect the entire order payment in advance and then do the delivery from the parent warehouse location.
Gift Certificate - Allow Sale and Redemption in Single Transaction	If this is checked then system would allow cashier to sell and redeem the Gift Card/ Certificate in the same transaction. The user would not be able to sell and redeem the same gift certificate even if this setting is turned on.
Automatically Select Serial/Batch	Select this from the following available options: • **Manual** – System will not pick the batch/serial details automatically and therefore user must select it manually while selling the Serial/Batch controlled items on iVend POS. • **Expiry Date** – System will automatically select the batch/serials which are expiring first.

	• **Lowest Price First** – System will pick the serial/batch based on the lowest price. • **Highest Price First** – System will pick the serial/batch based on the highest price. • **Creation Date** – System will pick the serial/batch based on the basis on their record creation date. • **Only if One Available -** System will select the serial/batch only if single serial/batch is available for sale in the system.
Allow User Define Product Id	In case of iVend Unplugged, check this flag so that user can enter the product ID while creating a new product record in the system. If this flag is checked then the new product records can be created only from iVend Enterprise.
Allow Partial Receiving of Inventory	Setting this flag will allow user to receive the inventories partially which are sent to stores using stock transfers or against the raised purchase orders.
Replication Batch Size	Data between stores and enterprise is exchanged in batches of 5000 records. You can change this value to a lower level in case the bandwidth between store and enterprise is less.
Allow Add Item In Goods Return For GRPO	This flag enables the user to add additional items while creating a Goods Return for a GRPO.
Allow Back Date At End Of Day Process	Setting this flag will allow the user to change the Business Date to a date less than the current date.
Allow Duplicate Barcode On Product	Setting this flag will allow specifying the same bar code for more than one product.
Expiry Date Required For Batch Item	Setting this flag will make specifying the expiry date for a batch-controlled item mandatory in the system.
Expiry Date Required For Serial Item	Setting this flag will specify the expiry date for a serial controlled item mandatory in the system.
Assign Customer/Vendor to All Branches	This setting is relevant to the installation where ERP type is selected as SAP Business One.

	Setting this flag would assign Business Partner created from iVend to all the Branches defined in SAP Business One.
Use Advance Authorization	Select this checkbox to allow multi-level approvals with manager override.
Allow Over Receiving In GRPO	Setting this flag will allow user to receive the more inventories, which are mentioned in raised purchase orders.
Allow Over Receiving In Stock Transfer	Setting this flag will allow user to receive the more inventories, which are sent to stores using stock transfers.
Inventory Count Merge Setting	This setting would determine the date that the system would pick for the inventory count when the inventory counts are merged. • Current Date: Use the current system date when the counts are merged. • Earliest Date : Use the minimum date from the inventory counts that are being merged • Latest Date : Use the maximum date from the inventory counts that are being merged.
Enable Location	Setting this flag will allow user to create multiple location for warehouses to maintain inventories location wise.
Enable Log Replication	Setting this flag will allow user to replicate the audit logs of objects to other store or enterprise.
Inter-store Transactions	
Allow Delivery From General Warehouse	Select this option if you want to capture the Sales/Order at Store which are to be delivered from General Warehouse from SAP Business One
Use Inter-store Transactions	Select the option if you want to see the transaction of one store across the other store. Feature also give the functionality to create a sale at one store and delivering the product to the customer from another store.
Transaction Server (This section is enabled only if the user has purchase a license for the Transaction Server)	
Is Transaction Server Integrated	Select this option to enable the transaction server functionality.
Exchange Transaction	Check this option if you do not want to send the transactional data from one store to another store.

Data Between Store	
Transaction Search Type	Select from the following valid values: • **Local**: Shows the transaction search result by doing the transaction search only on the local store server. • **Local and Enterprise:** Shows the transaction search result by doing the transaction search at local and at the Enterprise Server.
Maximum Records Count To Return From Server	Enter the maximum number of result records that a transaction server can return based on the transaction search criteria. This setting would depend based on the network connection bandwidth between the POS and the Enterprise Server.
Transaction Rollup	
Use Transaction Rollup	Select this to enable transaction rollup in iVend. One invoice per store/ per customer/ per business day will be posted in SAP business one. The user would be able to turn on this setting any time, even after the system is live. Once this setting is checked then user would not be allowed to change it.
Rollup Only Cash Customer Invoices	If this setting is checked then only invoices, generated against the Store's Cash Customer, would be rolled up by the iVend.
Use Store Cash Customer For Rollup	By default, the customer chosen in invoice at POS will be the customer against which the rolled up transaction will be created in SAP Business One, but if required then a single customer for each store can be configured as Cash Customer and all the rolled up invoices will be created against this cash customer.
Interval Type	User can specify the processing of the job based on daily basis or based on the hour interval.
Interval	User can specify the value in this text box based on the Interval Type.
Loyalty	
Is Active	Select this option if the loyalty module of CitiXsys is available and user wants to integrated loyalty with iVend.
Subsidiary	
Multiple Subsidiary Enabled	Select the option to enable the Subsidiary functionality. This field is not visible, If ERP System selected as SAPBusinessOne or NAV.

	This is one time setup. Once enabled this option cannot be disable. If you are not sure about this functionality, please take a backup of HO, and all store databases. For more information about Multiple Subsidiary functionality, please refer Administration > Retail Configuration > Subsidiary.
Assign Customers to all Subsidiary	Select this option, to assign all the subsidiaries of system to New Customers, when creating the customer from Store Server. This field is enable, If subsidiary is enabled. This field is not visible, If ERP System selected as SAPBusinessOne or NAV.
Enterprise Logo	
Logo	Displays the company logo added, if any. Click the *Add Logo* button to add the logo.
Buttons	
[Add Logo]	The button enables the user to add a logo. Select an image by clicking the button to browse for the logo.
[Remove Logo]	The button deletes the image added as a logo. On clicking the button, the system prompts a confirmation message.
[Custom Series]	Displays the Custom series definition view that allows specifying custom numbering series for Products, Customer, and Vendors. See also, *Custom Series*.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Custom Series

For creation of Products, Customers, and Vendors, the custom numbering series has to be defined either at the Enterprise or at the Store level. These settings are used to generate automatic codes for Products, Customers, and Vendors.

To open the screen, choose *Enterprise > Custom Series or Store > Custom Series.*

Custom Series Settings Screen

Field	Description/Activity
Customer Details	
Prefix	Define the prefix to be used when generating a new Customer Code. For each store, a unique prefix has to be defined. A maximum 8 alphanumeric characters can be entered.

Start Number	Define a start number for the series. Once the code is generated, the start number increases every time by 1 when the next code is generated.
Length	Define the total length of the customer code. The maximum length can be 15 characters. The code would be padded with zero's ('0') to make the customer code length equal what has been specified.
Vendor Details	
Prefix	Define prefix to be used when generating a new Vendor Code. For each store, a unique prefix has to be defined. A prefix of maximum 8 alphanumeric characters can be entered.
Start Number	Define a start number for the series. Once the code is generated, the start number increases every time by 1 when the next code is generated.
Length	Define the total length of the vendor code. The maximum length can be 15 characters. The code would be padded with Zero's ('0') to make the vendor code length equal what has been specified.
Product Details	
Prefix	Define prefix to be used when generating a new Product Code. For each store, a unique prefix has to be defined. A maximum of 8 alphanumeric characters can be entered.
Start Number	Define the start number for the series. Once the code is generated, the start number increases every time by 1 when the next code is generated.
Length	Define the total length of the product code. The maximum length can be 20 characters. The code would be padded with Zero's ('0') to make the product code length equal what has been specified.

Communication Settings

This screen allows user to specify the complete enterprise server address where the iVend APIs are hosted.

To open the screen, choose *Administration > System Initialization > Communication Settings*.

Communication Settings Screen

Field	Description/Activity
Passbook Settings	
Is Passbook Integrated	If you have signed up with iVend Passbook, then mark this as checked and fill the details by clicking the button "Passbook Settings". iVend Passbook features allows you to send the Gift Cards, Loyalty Cards and coupons to your customers on their iOS and Android devices.

	For more information visit http://www.ivend.com/ivend-passes/
API Server Settings	
Full Server Address	Enter the server address where iVend APIs are hosted. This address will be used to connect to iVend APIs.
Enable SSL	Check this option if the connection between store and enterprise is a secured connection.
Server Address	Enter the server address where iVend APIs are hosted.
SMTP Details	
Server Host	Specify a string value indicating the address of the mail server. An alternative way to specify the SMTP server is through an IP address. Setting the SMTP server details will enable the users to send the reports by email to other users.
User Name	Enter the User Name for the SMTP service. In general, this is user's email address.
User Password	Enter the set password for the provided user name.
Server Port	Specify an integer value indicating the port on which the SMTP service uses to detect incoming connections. Port 25 is typically used to send e-mails.
Enable SSL	Mark this flag if the specified SMTP requires a SSL for sending e-mails.
Messaging Settings	
Enable SMS Notification	Check this option if you want to enable the SMS communication within application.
SMS Gateway	Select the SMS gateway from the available list. • ClickaTell • ClickSend • MessageMedia • Nexmo • SMS Country • SMSGlobal
Assembly Name	Shows the Assembly name based on the selected SMS gateway.
Class Name	Shows the Class name based on the selected SMS gateway.
Buttons	
[Passbook Settings]	Opens the form for doing the passbook related settings.
[SMS Configuration]	Open the form for doing the SMS gateway settings based on the selected SMS gateway.
[Test Email]	Clicking this button a pop-up screen appears to send a test e-mail on the specified e-mail address.

	This button remains disabled by default and can be enabled to provide SMTP detail.
[Test SMS]	Clicking the button a pop-up screen appears to send test SMS on the specified mobile number. This button remains disabled by default and can be enabled to provide SMTP detail.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

System Display Settings

User can customize the display settings based on the Culture Information set on iVend Enterprise.

To open the screen, choose *Administration > System Initialization > System Display Settings.*

Setup Screen

Field	Description/Activity
Date Separator	Defines the string that separates the components of a date, that is, the year, month, and day.
Full Date Time Pattern	Defines the custom format string for a long date and longtime value.
Long Date Pattern	Defines the custom format string for a long date value.
Long Time Pattern	Defines the custom format string for a long time value.
Month Day Pattern	Defines the custom format string for a month and day value.
Short Date Pattern	Defines the custom format string for a short date value.
Short Time Pattern	Defines the custom format string for a short time value.
Time Separator	Defines the string that separates the components of time, that is, the hour, minutes, and seconds.
Year Month Pattern	Defines the custom format string for a year and month value.
Number Negative Sign	Defines the string that denotes that the associated number is negative.
Number Positive Sign	Defines the string that denotes that the associated number is positive.
Number Decimal Digits	Defines the number of decimal places to use in numeric values.
Number Decimal Separator	Defines the string to use as the decimal separator in numeric values.
Number Group Separator	Defines the string that separates groups of digits to the left of the decimal in numeric values.
Number Negative Pattern	Defines the format pattern for negative numeric values. Valid values are:

<table>
<tr><td></td><td><table><tr><th>Value</th><th>Associated Pattern</th></tr><tr><td>0</td><td>(n)</td></tr><tr><td>1</td><td>-n</td></tr><tr><td>2</td><td>- n</td></tr><tr><td>3</td><td>n-</td></tr><tr><td>4</td><td>n -</td></tr></table></td></tr>
<tr><td>Currency Decimal Digits</td><td>Defines the number of decimal places to use in currency values.</td></tr>
<tr><td>Currency Decimal Separator</td><td>Defines the string to use as the decimal separator in currency values.</td></tr>
<tr><td>Currency Group Separator</td><td>Defines the string that separates groups of digits to the left of the decimal in currency values.</td></tr>
<tr><td>Currency Negative Pattern</td><td>Defines the format pattern for negative currency values. Valid values are:<table><tr><th>Value</th><th>Associated Pattern</th></tr><tr><td>0</td><td>($n)</td></tr><tr><td>1</td><td>-$n</td></tr><tr><td>2</td><td>$-n</td></tr><tr><td>3</td><td>$n-</td></tr><tr><td>4</td><td>(n$)</td></tr><tr><td>5</td><td>-n$</td></tr><tr><td>6</td><td>n-$</td></tr><tr><td>7</td><td>n$-</td></tr><tr><td>8</td><td>-n $</td></tr><tr><td>9</td><td>-$ n</td></tr><tr><td>10</td><td>n $-</td></tr><tr><td>11</td><td>$ n-</td></tr><tr><td>12</td><td>$ -n</td></tr><tr><td>13</td><td>n- $</td></tr><tr><td>14</td><td>($ n)</td></tr><tr><td>15</td><td>(n $)</td></tr></table></td></tr>
<tr><td>Currency Positive Pattern</td><td>Defines the format pattern for positive currency values. Valid values are:<table><tr><th>Value</th><th>Associated Pattern</th></tr><tr><td>0</td><td>$n</td></tr><tr><td>1</td><td>n$</td></tr><tr><td>2</td><td>$ n</td></tr><tr><td>3</td><td>n $</td></tr></table></td></tr>
<tr><td>Percent Decimal Digits</td><td>Defines the number of decimal places to use in percent values.</td></tr>
<tr><td>Percent Decimal Separator</td><td>Defines the string to use as the decimal separator in percent values.</td></tr>
<tr><td>Percent Group Separator</td><td>Defines the string that separates groups of digits to the left of the decimal in percent values.</td></tr>
<tr><td>Percent Negative Pattern</td><td>Defines the format pattern for negative percent values. Valid values are:<table><tr><th>Value</th><th>Associated Pattern</th></tr><tr><td>0</td><td>-n %</td></tr></table></td></tr>
</table>

	1 -n% 2 -%n 3 %-n 4 %n- 5 n-% 6 n%- 7 -% n 8 n %- 9 % n- 10 % -n 11 n- %
Percent Positive Pattern	Defines the format pattern for positive percent values. Valid values are: 0 n % 1 n% 2 %n 3 % n
Currency Symbol	Defines the string to be used as currency symbol.
[Ok]	This button updates changes to the database and closes the screen.
[Cancel]	The button closes the screen without saving any changes.

Country

The countries set up through this screen are available in the lookup whenever an address is added to the system.

To open the screen, choose *Administration > System Initialization > Country*.

Search Screen

Field	Description/Activity
Search Criteria	
Code Country	Specify the country code to be searched.
Description	Enter the description of the country(s) to be searched.
Search Results	
Code	Displays the searched country code.
Description	Displays the searched country description.

Setup Screen

Field	Description/Activity
Code	Enter the country code. It allows entering a unique code of maximum 20 alphanumeric characters.
Description	Enter the country description. It allows entering a description of maximum 100 alphanumeric characters.
Accounting ID	This is a system generated unique key for each country that helps in the integration of the Country Code in iVend with the Country Code in SAP Business One.

[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button closes the screen without saving any changes.

State

Setup the various states within the countries defined in the system.

To open the screen, choose *Administration > System Initialization > State*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the state code to be searched.
Description	Mention the description of state(s) to be searched.
Search Results	
Code	Displays the searched state(s) code.
Description	Displays the description of searched state(s).

Setup Screen

Field/Button	Description/Activity
Code	Enter the state code. It allows entering a unique code of maximum 20 alphanumeric characters.
Description	Enter the state description. It allows entering a description of maximum 100 alphanumeric characters.
Country	Select a country from the list of countries. Click *[...]* to open the Country Search screen and select the country. To add a new country, press "**F3**" or click on the [**F3 New**] button in the Country Search screen.
Accounting ID	This is a system generated unique key for each state that helps in integration of the State Code in iVend with the State Code in SAP Business One.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button closes the screen without saving any changes.

Zip Code

The feature enables the user to add and remove zip codes to maintain a zip code database. The zip codes in the address have to be validated during the fulfillment of the sale.

To open the screen, choose *Administration > System Initialization > Zip Code*.

Setup Screen

Field/Button	Description/Activity
Zip Code	Enter a Zip code of maximum 30 alphanumeric characters.
Add	Click the button to add a row in the grid and enter the value for the Zip code.
Delete	Click the button to delete the selected Zip code.

[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button closes the screen without saving any changes.

Message

Use this feature either to search for existing messages or to set up new messages that will be displayed in Point of Sale (POS) or Management Console (MC). Message will appear in association when certain elements in iVend are used in a transaction, or when certain actions take place.

To open the screen, choose Administration > *System Initialization* > *Message*.

The various sources for which the user specifies the messages are:

Item	Description
User	The message pops up as soon as the user logs in Management Console or POS.
Job Code	The message appears when the particular job code is selected in POS.
System	The message appears at the MC Login screen.
POS	The message appears when the user logs in the specified Point of Sale.
Product	The message pops up when a transaction is made for the particular product in POS.
Product Group	The message pops up when a transaction is made for any product in the Product Group in POS.
Sale Complete	The message pops up on the completion of a transaction in POS.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the message code to be searched.
Description	Enter the message description to be searched.
Message	Enter the content of message to be searched.
Type	Select the source type for which the message(s) has to be searched.
Search Results	
Code	Displays the searched message(s) code.
Description	Displays the description of searched message(s).
Type	Displays the source type of searched message.

Setup Screen

Field	Description/Activity
Code	Enter the unique message code which can be maximum 20 alphanumeric characters.
Description	Enter the message description which can be maximum 100 alphanumeric characters.

Message	Enter the message content which can be maximum of 500 alphanumeric characters.
Type	Select one of the following sources where the user wants the message to pop up: User Job Code System POS Product Product Group Sale Complete Customer Customer Group
Source	Select the value associated to source type. For example, if the source type is POS, the Source would be POS code.
Start Date	Enter the date from which it should display the message(s).
End Date	Enter the date up to which it should display the message(s).
Start Time	Enter the time from which it should display the message(s).
End Time	Enter the time up to which it should display the message(s).
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	This button closes the screen without saving any changes.

Document Number Series

This feature enables the user to generate a unique document number for the documents created in iVend. The value refers to the numeric series assigned to a document in Management Console/Point of Sale.

To open the screen, choose *Administration > System Initialization > Document Number Series*.

Search Screen

Field	Description/Activity
Search Criteria	
Store	Enter the Store ID to search the required number series from that store.
POS	Enter the POS ID to search the required number series from that POS.
Prefix	Enter the Store ID to search the required number series.

Suffix	Enter the Suffix of record to search the required number series from that store.
Reset at End of Day	Enter the criteria to search the required number series.
Authorization Code	Enter the Authorization Code for which the number series is to be searched.
Active	Enter the criteria to search the required number series.
Document Type	Select the document type from the list for which the number series is to be searched.
Description	Enter the criteria to search the required number series.
Search Results	
Store	Displays the Number series ID available in the system.
POS	Displays the Number series description available in the system.
Start Date	Displays the validity Start Date of the series.
End Date	Displays the validity End Date of the series.
Start Number	Displays the Start number of the series.
End Number	Displays the End number of the series.

SETUP SCREEN

Field	Description/Activity
General	
Store	Select the Store to define the Document Number series.
POS	Select the appropriate Point Of Sale to define the Number Series.
Document Type	Select the document type from the drop-down menu for which the user wants to generate a number series. • Purchase Order • Goods Receipt Against Purchase Order • Stock Transfers • Goods Receipt Against Stock Transfers • Goods Receipt • Goods Issue • Stock Requisition • Sale Transaction • Refund Transaction • Exchange Transaction • Special Order Transaction • Quotation Transaction • AR Payment Transaction • Layaway Transaction • Delivery Transaction • Default Series For Transaction
Prefix	Enter the Prefix of Document Number.
Suffix	Enter the Suffix of Document Number.

Start Number	Enter the numeric value from which the document number series will start.
End Number	Enter the numeric value for the last number of series.
Start Date	Enter the start date from which the document series will be applicable.
End Date	Enter the end date to define the Document Number series.
Reset at End of Day	Enable the checkbox to reset the defined Number series after the commencement of End Of Day process.
Authorization Code	The Authorization Code authenticates the Document Number Series defined by user.
Description	Enter the Description of series (if any).
Active	This checkbox activates or deactivates the defined series.
Current Number	Shows the current running number of the document.
[OK]	This button updates changes to the database and closes the screen.
[Cancel]	The button closes the screen without saving any changes.

Export Configuration Package

This feature enables the user to generate a settings package that can then be imported into another iVend instance. This feature provides a functionality to the user to carry the settings from UAT to the production system.

To open the screen, Choose *Administration > IT Administration> Export Configuration Package*.

Setup Screen

Field	Description/Activity
Selected Modules	Select the module for which the settings are to be exported from the system.
Modules	Shows the module name.
[Select All]	Click this button to select all the available modules.
[UnSelect All]	Click this button to deselect all the available modules.
[Export Settings]	Click on this button to create a settings package for the selected modules.
[Convert to Production]	Click this button to convert the same instance from UAT to Production. Clicking on this button will delete all the transactional data in the system. Only master data would be retained in the system so that it can be used for doing the transactions. This would also generate an event so that the stores transactional data is also cleared.
[OK]	This button updates changes to the database and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.

Exit

Click this option to close Management Console. To use this option go to *Administration > System Initialization > Exit*.

Search Grid Definition

Use this feature to specify the sequence of the search criteria fields on all the search screens in the system.

To open the screen, choose *Administration > Application Setup > Search Grid Definition*.

Search Screen

Field	Description/Activity
Search Criteria	
Screen Name	Enter the name of the screen for which the sequence of the fields is to be specified.
Search Results	
Screen Name	Displays the name of the screens available in the system.

Setup Screen

Field	Description/Activity
General	
Screen Name	Select a search criteria screen to modify from the list and click [Edit].
Details	
Field Name	This will list all the search criteria that are available for this screen.
Buttons	
[Up]	Select the field name from the detail section and click [Up] to move this search criterion up in the sequence.
[Down]	Select the field name from the detail section and click [Down] to move this search criterion down in the sequence.
[First]	This will take the selected search criteria on top of the sequence.
[Last]	This will take the selected search criteria to bottom of the sequence.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Search Grid Column Definition

Use this feature to specify the columns to show/hide in the search results in all the search screens in the system.

To open the screen, choose *Administration > Application Setup > Search Grid Column Definition*.

Search Screen

Field	Description/Activity
Search Criteria	
Screen Name	Enter the name of the screen for which the sequence of the fields is to be specified.
Search Results	
Screen Name	Displays the name of the screens available in the system.

Setup Screen

Field	Description/Activity
Selected Columns	
Table Name	Displays the name of the source table for the column.
Field Name	Displays the name of the source table column for the result column
Show In Grid	Click on check box to remove the field from the Result
Caption	Enter the text to show as caption for the column
Sequence	Shows the position of the column in the result
Available Columns	
Table Name	Displays the name of the source table for the column.
Field Name	This will list all the search criteria that are available for this screen.
Show In Grid	Click on check box to add the field to the Result columns
Caption	Shows the text entered to show as caption for the column
Buttons	
[Up]	Select the field name from the Selected Columns section and click [Up] to move this column one position to the left.
[Down]	Select the field name from the Selected Columns section and click [Down] to move this column one position to the right.
[First]	This will take the selected field to the left of the sequence.
[Last]	This will take the selected field to the right of the sequence.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

POS Transaction Info Grid

The feature enables the user to setup the information that requires to be shown in the POS transaction information view.

To open the screen, choose *Administration > Application Setup > POS Transaction Info Grid*, the POS Transaction Info Grid List displays.

Search Screen

Field	Description/Activity
Id	Enter the section Id to be searched.
Description	Enter the Description for the section to be searched.
Section Type	This shows the section of the grid for which the information is set. The possible sections that can be customized for viewing are: Customer Line Item Quick Button Panel
Caption	Shows the label that is to be shown in the POS transaction information grid.
Subsidiary	Displays the Subsidiary of the POS transaction information searched.(If Subsidiary is enabled)

SETUP SCREEN

Select a section from the POS Transaction Info Grid List and click [Edit] to open the POS Transaction Information Grid to add or modify entries.

Field	Description/Activity
Header Information	
Id	Enter the unique Id for the information.
Description	Enter the Description for the section being defined.
Section Type	This shows the section of the grid for which the information is to be set. The possible sections that can be customized for viewing are: Customer Line Item Quick Button Panel Click [New] to choose Quick Button Panel to create and to add buttons to that section. Click [Edit] to add or remove rows from either the Customer or LineItem Section Types. No other Section Types can be added.
Section Caption	Enter the label to be shown at the POS for the respective section.
Subsidiary	Select a Subsidiary to which the QuickButtonPanel belongs from the list of Subsidiary(s). Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field will be available if Subsidiary is enabled on enterprise and value of field Section Type is 'QuickButtonPanel'.
Is Default	Marking this as default would default this setup for all the stores that are created subsequent to creating of this record.
Row Count	Enter the number of buttons rows required at the POS.
Column Count	Enter the number of button columns at the POS.
Screen Percentage	Enter the screen percentage that the button panel should occupy on the main transaction screen.
Display Price	Select this option if user wants to display the item price on the quick button panel.
Display Quantity	Select this option if the user wants to display the on the quick button panel.
Details	

Button Type	Choose Button Type as one of the following:- • **Product:** Choose Product to set a particular product as a Button at the Point of Sale. Clicking this button adds the product directly to the Transaction screen. • **Product Group:** Choose Product Group to set a Quick Button for a particular Product Group. • **Product Category:** Choose a Product Category to directly access a particular Product Category at Point of Sale. • **Custom:** Choose Custom to configure a user defined Button in the Quick Button Panel. The user needs to specify a caption/image for the button and then add child items. A child item may be a Product button, a Blank button or another button of Custom type. • **Blank:** A Blank type of button will not require a caption and would simply be rendered as white space or separator. To help organize other buttons this button is not clickable. This is enabled in case the section type is QuickButtonPanel.
Caption Type	In case of QuickButtonPanel, the user can select the value that is to be shown on button in the POS transaction information grid. Each button will correspond to a product. Clicking on the button will insert the product in transaction.
Caption	Enter the label for the field to be shown at POS.
Value Type	Value Type allows users to select the type of transaction for which this information is to be shown at POS. This is only enabled for the Section Type - LineItem.
Value Source	Based on the Section Type, it will show the list of values that can be shown at the POS. For example, if the Section Type is Customer, then the only valid values for values sources are automatically listed as Id, Name, and Company Name etc. This is disabled in case the Section Type is QuickButtonPanel.
Product	Select the product for which the quick button is setup. This is enabled only for the Section Type: QuickButtonPanel. If subsidiary is enabled, Product search will be filtered as per selected subsidiary.
Product Image	Choose a product image to be shown as the button background image for the quick entry button. This is enabled only for Section Type: QuickButtonPanel.
Group Number	Enter a specific Group number to classify items into specific group. Products of the same group are displayed together. This is enabled in case the section type is QuickButtonPanel.
Color	Choose a specific color to highlight a button in the panel.

	This is enabled in case the section type is QuickButtonPanel.
Active	Specify the Button is active or not. This is enabled in case the section type is QuickButtonPanel.
Font Color	Choose specific font color for button in the panel. This is enabled in case the section type is QuickButtonPanel.
Bold	Choose if button text needs to be displayed in bold in the panel. This is enabled in case the section type is QuickButtonPanel.
Font Size	Choose specific font size for button in the panel. This is enabled in case the section type is QuickButtonPanel.
Caption	Enter the label for the field to be shown at POS.
Show Blank Row	Select this option to show a blank row in the POS transaction information grid even if the underlying value is blank. E.g. if you want to show a row for the serial number of the product even if the product is not serial controlled.
Buttons	
[Add Row]	Adds a new row for the user to setup the values.
[Delete Row]	Deletes the selected Row.
[Up]	Select the field name from the detail section and click Up to move this search criterion up in the sequence.
[Down]	Select the field name from the detail section and click Down button to move this search criterion down in the sequence.
[Add Detail Row]	This button is visible only when the Section Type is set to QuickButtonPanel. Clicking this button would create a child level buttons for the selected quick button.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Report Manager

The feature enables user to use the custom reports from within iVend. User can import a new report or can import the customized version of the existing report in iVend.

To open the screen, choose *Administration > Application Setup > Report Manager*.

Search Screen

Field	Description/Activity
Search Criteria	
Id	Enter the Id of the report to be searched.
Description	Enter the description of the report to be searched.
Search Results	
Id	Displays the Id of the report available in the system.
Description	Displays the description of the report available in the system.
Buttons	
Export	Exports the selected report to a user specified. User can then customize this report and import the customized version back into the system

Setup Screen

Field	Description/Activity
Description	This will show the name of the screen for which the sequence is being defined.
Report XML	Displays the location of the DLL. Select a DLL for the hardware by clicking on *[...]* to browse for the location of the DLL in the machine.
Report Path	Displays the location of the DLL. Select a DLL for the hardware by clicking on *[...]* to browse for the location of the DLL in the machine.
Type	Signifies that this report is a custom reports and is not shipped with the product.
Enabled	Signifies whether the report is in use or not.
Customized	After making changes to the reports if the user imports these reports into iVend, such reports will be marked as customized. Any new report imported in the system will be marked as customized report. This field is for information only and is disabled.
Document Report	Document reports are those reports that are fired on posting of the document in iVend. For example, when the purchase order is saved then the report for the saved Purchase Order is triggered automatically. If a report is marked as document report then the user is allowed to change the format of the report but is not allowed to change the parameters of the report. This field is for information only and is disabled.
Is Label Report	Label Reports are used for printing the customized item labels from iVend. User can create item labels using the crystal report and then import the same into the system. Once the report then the customized labels can be printed using the ''Item Label Printing'' menu option in the Reports Tab.
Is Coupon Report	If this flag is checked while importing a report then while issuing the Coupons from POS, this report can be used for printing.
Report Group Type	Select from the available list of groups under which this report is to be displayed.
Notification Report	Select this field to mark the report as alert report.

[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

On importing the new custom report in iVend, system would create rights for this report. The rights for super user would be updated automatically, whereas the administrator should assign the security rights individually to other roles based on the desired security for these roles.

User Defined Fields (UDF)

The feature enables user to create/use the User Defined fields on the customer and product. Using this feature user can create addition fields for capturing additional information regarding customer/product. This feature also gives the flexibility to the user to integrate these user-defined fields to SAP Business One UDF's.

To open the screen, choose *Administration > Application Setup > User Defined Fields*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the Id of the UDF group to be searched.
Description	Enter the description of the UDF group to be searched.
Search Results	
Code	Display the Id of the UDF group available in the system.
Description	Display the description of the UDF group available in the system.

Setup Screen

Field	Description/Activity
Header Detail	
Object Type	Select the Object for which you want to create the UDF. Choose custom validvalue for custom table.
Name	Enter the code for the UDF group.
Description	Enter the description of the UDF group.
Is History tracked	Select the flag, if user want to enable logging of the data.
Detail	
Field Name	Enter the field name for the UDF.
Description	Enter the Description for the UDF. The text defined in Description would appear on the search results.
Data Type	Select the type of data that would be stored in this field. Valid values are: 1. String

	2. Numeric 3. Currency 4. Decimal 5. DateTime 6. Boolean 7. Dat Time 8. Image 9. Int16 10. Int32 11. Int 64 12. Valid Values
Is Searchable	Mark this flag if user wants to make this field available in the Search Criteria.
Data Length	Enter the number of characters this field can hold.
Display Only	Select this flag, if user wants not to allow updates of this field from iVend.
Display In Result	Mark this flag if user wants to make this field available in Search Results.
Is Mandatory	Mark this flag if capturing the data in this field is mandatory.
Pattern	Enter the Regular Expression to validate the data.
[Add Row]	Adds a new row for creating a UDF under the selected object.
[Delet Row]	Deletes the selected record.
[Valid Values]	Enter the Valid Values for the record.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Validation Rules

The feature enables user to view the various rules setup for the data fields in the system.

To open the screen, choose *Administration > Application Setup > Validation Rules*.

Search Screen

Field	Description/Activity
Search Criteria	
Object Id	Enter the Object Id for which the validation rules are to be searched.
Rule Type	Enter the Rule Type for which the records are to be searched.
Search Results	
Id	Display the Id of the validation rule.
Description	Displays the description of the validation rule.
Property Name	Displays the Property Name on which the validation rule is setup.
Object Id	Displays the System Object Id on which the validation rule is setup.
Rule Type	Select from the available Rule Types

Property Caption	Display the system property on which the rule is applied.

SETUP SCREEN

To add the new validation rule in the system do the following steps:

1. Open the data entry form iVend Management console on which the validation rule is to be defined.
2. Right-click on the field on the form on which the new rule is to be defined.
3. Select the option from the shown context menu. (Please note the various options on the context menu are enabled/disabled based on the select field).
4. Create a rule and then restart the management console.

Field	Description/Activity
Make this field mandatory (Validation Rule)	Allows user to make a field mandatory.
Set the maximum length of the field (Validation Rule)	Allows user to set the maximum number of characters to be allowed to enter in the field. applicable to string fields only
Set the minimum length of the field (Validation Rule)	Allows user to set the minimum number of characters required to enter in the field. applicable to string fields only
Set the length range of the field (Validation Rule)	Allows user to set the maximum and minimum number of characters to be allowed to enter in the field. applicable to string fields only
Set the maximum value of the field (Validation Rule)	Allows user to set the maximum value (applicable to numeric fields only) to be allowed to enter in the field. applicable to numeric fields only
Set the minimum value of the field (Validation Rule)	Allows user to set the minimum value required to enter in the field. applicable to numeric fields only
Set the value range of the field (Validation Rule)	Allows user to set the maximum and minimum value to enter in the field. applicable to numeric fields only
Set the pattern for the field value (Validation Rule)	Allows user to set the pattern of characters to be allowed to enter in the field.
Hide this field (Validation Rule)	Allows user to hide the field from UI. Mandatory fields are not allowed to hide.
Show all fields	Allows user to see all the custom validation rules created for the UI
Change field caption	Allows user to change the caption of the field

Property Caption Setup

The feature enables user to view the various captions that are customized in the application.
To open the screen, choose *Administration > Application Setup > Field Caption Setup*.

Search Screen

Field	Description/Activity
Search Criteria	
Current Caption	Enter the Object Id for which the validation rules are to be searched.
Culture	Select the culture information for which validation rules are to be searched.
Search Results	
Id	Display the Id of the caption.
Original Caption	Displays the original caption of the field.
Current Caption	Displays the changed caption of the field.
Culture	Displays the Culture for which the caption is setup.

To add the caption of any field/button/menu do the following steps:

1. Open the screen/menu on which the caption is to be changed.
2. Right-click on the field/menu/button on the form on which the caption is to be changed.
3. From the context menu, click on the option "Change Field Caption".
4. Define the new caption of the field/menu/button on the change field caption form.
5. Save the new caption.

Email SMS Template

This screen allows you to create email/SMS templates when the notification is sent, the message contains well formatted and predefined content created using this screen.

This template is used by the mailing engine to send predefined content to the target customer. The contains a WYSWIG (what you see is what you get) rich HTML editor which allows you to use custom fonts, colors, embed images and even use CSS (cascading style sheet) for delivering expression based email notification.

To create a meaningful email/SMS template you can create template one at a time and enter a subject such as “Loyalty Alert: Your points are about to expire”. In the rich HTML editor, you will need to embed placeholders in many places so that the system can replace the placeholders with the actual values stored in the database. For example, if you wish to address the loyalty member, you could use the %FullName% placeholder or if you wish to inform the customer about the total points available until date, you could use the %AvailablePoints% placeholder. You may edit the content, as many times you want later. You can get placeholder on cursor position by right click of mouse.

To open the screen, choose *Administration > Application Setup > Email SMS Template*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the Email SMS Template to be searched.
Description	Enter the description of the Email SMS Template to be searched.

Search Results	
Code	Displays code of the Email SMS Template searched.
Description	Displays description of the Email SMS Template searched.

Setup Screen

Field	Description/Activity
Code	Enter a code for the Email SMS Template. A unique code of a maximum 20 alphanumeric characters can be entered.
Description	Enter a description for the Email SMS Template.
Enable Email Notification	Checked if want to enable email notification.
Enable SMS Notification	Checked if want to enable SMS notification.
Email Subject	Enter the email subject in case email notification is checked.
HTML Editor for Emails	Create a rich email content here by combining various fonts, colors, divisions, images, hyperlinks and CSS etc.
Editor for SMS	Create a SMS content here for SMS Template.
[OK]	This button saves the changes and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.

Schedule Manager

The feature enables user to use to schedule the specified type of tasks to execute single or multiples times with defined intervals.

To open the screen, choose *Administration > Application Setup > Scheduler Manager*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the Id of the Schedule to be searched.
Description	Enter the description of the Schedule to be searched.
Search Results	
Code	Displays the Id of the UDF group available in the system.
Description	Displays the description of the UDF group available in the system.

Setup Screen

Field/Button	Description/Activity
General	
Code	Enter the code for the Schedule.
Description	Enter the description of the Schedule.
Type	Type of the Schedule. Below Types are allowed in iVend Scheduler. • **Report** - Allows selecting any iVend report (Created using Report Designer in iVend) to send via mail. • **Query** - Allows selecting any Query (Created using Query Designer in iVend) to send via mail the Query result in

	Spreadsheet format (with .xls extension). (SMS if requested using SMS, first row of the Query Result) • **Campaign** – Allows selecting any Query that contains a column with Email name. Also Email template for sending with the mail.
Source	Source Item. iVend Report for Report type Schedule, Query for Query, Campaign type Schedule
Run On Request	Select this flag, if interested to execute the Schedule by requesting using SMS immediately. Not applicable for Campaign.
SMS Keyword	SMS Keyword to execute the Schedule, if Run On Request selected.
Schedule Enabled	Whether the Schedule is enabled to execute. If enabled, this Schedule will be executed by Scheduler.
Schedule	
Recurrence	Select the repeating frequency for the Schedule. • **NoRepeat** - Executes only once • **Weekdays** - Executes on particular weekdays only, select Weekdays. Allows selecting the days of week for execution. • **ForEvery** – To execute with customized frequency, select ForEvery. (For example, to execute once for every 2 days, etc.) • **Minute, Hourly, Daily, Weekly, Monthly, Yearly** – Executes at each specified interval
Interval	Allows entering when Recurrence is *ForEvery*. Enter the interval to repeat the Schedule.
Interval Type	Allows entering when Recurrence is *ForEvery*. Enter the interval unit to repeat the Schedule.
On Week Days	Allows entering when Recurrence is *Weekdays*. Select the Weekdays on which the Schedule to execute.
Start Date	Enter the Start date for the Schedule
Start Time	Enter the Start time for the Schedule, with Start date
Run Upto	Select until what time the Schedule should repeat. Below values are provided. • **NoEnd** – There is no end for the Schedule, repeats continuously • **AfterRepeatingSpecifiedTimes** – Allows specifying fixed number of times to repeat the Schedule. • **EndDate** – Allows to Specify End date and time
Repeat Times	Allows entering when Run Upto is *AfterRepeatingSpecifiedTimes*. Enter how many times the Schedule need to repeat
End Date	Allows entering when Run Upto is *EndDate*. Enter the End date for the Schedule

End Time	Allows entering when Run Upto is *EndDate*. Enter the End time for the Schedule, with End Date
Report	
Mail From	Enter Mail From to show as sender with the email
Mail To	Enter email address(es) of the persons to send the email. Multiple addresses should be separated by Comma(,) .
CC	Enter email address(es) of the persons to send the email. There address(es) will be shown in CC. Multiple addresses should be separated by Comma(,) .
Subject	Enter Subject of the email
Body	Enter Body of the email. Disabled for Campaign Job. Use Email Template for Campaign for Body.
Email Template	Applicable for Campaign only. Select the Email Template to use as Body for the email.
[Ok]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Export Data

Use this feature to export the information into an Excel file. The object types from which the data can be exported are as follows:

Zip Code	Store	Country
Job Code	Vendor	State
Department	Customer	Tax Code
Employee Position	Pos	Manufacturer
Product Category	Currency Denomination	Surcharge
UPC Translation	Product	Alternate Item
Sale Attribute	Customer Address	Warehouse
Reason Code	Vendor Address	Customer Group
Security User	Number Series Master	Team
Employee	Inventory Item	Product Class
Message	Event	Accounts Recievable
Up-sell Product	Price List	Vendor Warehouse Item
Fulfillment Plan	Special Price List	Product Surcharge
Layaway Plan	Tax Condition Setup	
Retail Profile	Product Group	

To open the screen, choose *Administration > Application Setup> Export Data*.

Setup Screen

Field/Button	Description/Activity
Object Type	Select one of the object for which the data is to be exported. By default 'none' is displayed.

[Ok]	When the user clicks on the button, depending on the object type selected the system would display the search screen for the object. Ex: If the user selects the Job Code object then the system would display the Job Code search screen where in the user can search for the records. User can then select the records that needs to exported and click on the OK button. The system would then take the user to the Export Results screen.
[Cancel]	The button closes the screen.

Export Results

The screen displays the data of the various records that have been selected by the user in the search screen.

Field/Button	Description/Activity
Results	The grid would display the information for all records that the user has selected to be exported.
Export to XLS	Clicking on this button would show the File Save box to the user where in the user can select the folder and put in the file name where the excel file would get saved with all the records exported.
[Ok]	The button closes the screen.
[Cancel]	The button closes the screen.

Import Data

The feature facilitates a quick setup by enabling the user to import data directly through excel. The object types for which the data can be imported are as follows:

Zip Code	Store	Tax Condition Setup
Job Code	Vendor	Product Group
Department	Customer	Country
Employee Position	POS	State
Product Category	Currency Denomination	Tax Code
Alternate UPC Code	Product	Manufacturer
Sale Attribute	Gift Certificate	Surcharge
Reason Code	Customer Address	Alternate Item
Security User	Vendor Address	Warehouse
Employee	Number Series Master	Customer Group
Message	Inventory Item	Team
Up-sell Product	Event	Product Class
Fulfillment Plan	Price List	Vendor Warehouse Item
Layaway Plan	Exchange Rate	Accounts Receivable
Retail Profile	Special Price List	Product Surcharge

To open the screen, choose *Administration > Application Setup > Import Data*.

Setup Screen

Field/Button	Description/Activity
Excel File Path	Displays the path of the Excel File. Select an excel file by clicking on … to browse for the file in the machine.
Sheet Name	Enter the name of the sheet in the excel file from which the data is to be imported.
Object Type	Select one of the object for which the data is to be imported. By default, 'none' is displayed.
File has Header	Select the option if the user wants the first row in the excel sheet to be displayed as column name in the Data Mapping Configuration Screen.
[Ok]	When the user clicks the button, the system displays the Data Mapping Configuration screen after filling the values in the above fields.
[Cancel]	The button does not save any changes and closes the screen.

Data Mapping Configuration

The feature enables the user to map the various fields in the excel sheet from which the data is being imported to the column names.

Field/Button	Description/Activity
Column Name	The field displays the first row in the excel sheet as the column name if the "File Has Header" checkbox is enabled in the "Import Data" Screen otherwise it displays the alphabets as the column name(s).
Field Name	Select one of the fields to map it with the column name.
[Ok]	The button updates changes to the database and closes the screen. The user clicks the button to display the "Import Results" Screen after mapping the field name(s)to the column name(s).
[Cancel]	The button does not save any changes and closes the screen.

Import Results

The screen displays the data of the various fields imported for the selected object from the excel sheet. It also enables the user to export the data to the excel sheet.

Alert Notification Setup

The feature enables the user to get the alerts for the events subscribed in iVend such as Purchase Order creation, Goods Receipt.

To open the screen, choose *Administration > Application Setup > Alert Notification Setup*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the Alert Notification to be searched.
Description	Enter the description of the Notification to be searched.

Active	Select the option on which the records are to be filtered.
Search Results	
Id	Displays the Notification Id defined in the system.
Description	Displays the description defined for the Notification in the system.
Active	Displays if the Notification is Active or not.

SETUP SCREEN

Field	Description/Activity
General	
Code	Enter the Id for the Notification.
Description	Enter the description for the defined Notification.
Type	List the events for which the notification can be setup: • Query • Purchase Order • Stock Transfer Request • Stock Transfer Shipment • Price List Change • Coupon Creation • Bonus Buy Creation • Goods Receipt PO Creation • Goods Issue Creation • Goods Return Creation • Goods Receipt Creation • Gift Certificate Creation
Report	Select the report that will be sent as attachment in e-mail when the Notification is generated.
Active	Selecting this option mark the Notification as active. Only active Notification would be visible and used. By default this option is enabled.
Add All User	Select this option is the Notification has to be sent to all Users in the system.
Sms/Email Template	The selected SMS/Email template will be used while sending the Email/ SMS to the user.
Query	Selected Query will be executed on the schedule setup for the Query Notification. This row will be enabled only when the Type is chosen as Query.
Buttons	
Add User	This button will allow users to be added for the Notification. The added user is allowed to get the Email Alert and Application Alert. This default setting can be modified by unchecking the specific user permissions to be notified.
Delete User	This button will delete the selected user for the notification.
Schedule	
Recurrence	Select the repeating frequency for the Schedule. • **NoRepeat** - Executes only once

	• **Weekdays** - Executes on particular weekdays only, select Weekdays. Allows selecting the days of week for execution. • **ForEvery** – To execute with customized the frequency, select ForEvery. (For example, to execute once for every 2 days, etc.) • **Minute, Hourly, Daily, Weekly, Monthly, Yearly** – Executes at each specified interval
Interval	Allows entering when Recurrence is *ForEvery*. Enter the interval to repeat the Schedule.
Interval Type	Allows entering when Recurrence is ForEvery. Enter the interval unit to repeat the Schedule.
On Week Days	Allows entering when Recurrence is Weekdays. Select the Weekdays on which the Schedule to execute.
Start Date	Enter the Start date for the Schedule
Start Time	Enter the Start time for the Schedule with Start date.
Run Upto	Select until what time the Schedule should repeat. Below values are provided. • **NoEnd** – There is no end for the Schedule, repeats continuously. • **AfterRepeatingSpecifiedTimes** – Allows specifying fixed number of times to repeat the Schedule. • **EndDate** – Allows to Specify End date and time.
Repeat Times	Allows entering when Run Upto is *AfterRepeatingSpecifiedTimes*. Enter how many times the Schedule need to repeat
End Date	Allows entering when Run Upto is *EndDate*. Enter the End date for the Schedule
End Time	Allows entering when Run Upto is *EndDate*. Enter the End time for the Schedule, with End Date

Alert Notification View

The window allows the user to view the alerts for the events subscribed in iVend such as Purchase Order creation, Goods Receipt.

To open the screen, choose *Administration > Application Setup > Alert Notification View*.

SETUP SCREEN

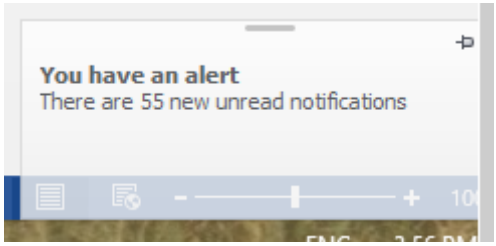
Field	Description/Activity
General	
Notification	This screen displays all received notifications based on the filter chosen – Un-Read/Read/All
Notification Details	
Notification Details	The screen is divided in two parts. The first part (on the left) displays the email body and the Second part (on the right) displays the PDF attachment sent through email to the user for viewing purpose only. If there is no email body, then the first part will be hidden.

[Ok]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Alert Notification can also be viewed from:

1. Status bar in Management Console by clicking on Notifications button.

2. By choosing the Message pop up (Will be displayed only when Management Console is Active).



3. By clicking on the top left icon at POS.

Currency

This feature displays the code and description of the various currencies setup in iVend Retail. It also where the various denominations for each currency are added. The denominations must be added to facilitate until counts.

To open the screen, choose Administration > *Financials* > *Currency*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the currency to be searched.
Description	Enter the description of the currency to be searched.
Base Currency	Select the option if the user wants to search for the base currency setup in the system.
Search Results	
Code	Displays the code of the currency searched.
Description	Displays the description of the currency searched.

Setup Screen

Field	Description/Activity
General	
Code	Displays the code of the currency.
Description	Displays the description of the currency.

Culture Information	Select one of the 'Culture Information' choices available in the dropdown. The currency symbol will be determined based on the culture information selected. E.g., if the Culture information selected is "English (United States)", the amounts will be displayed prefixed with the "$" sign.
Base Currency	The option is enabled if the currency is set as the base currency in SAP Business One.
Accounting Id	This is a system generated unique key for each currency that helps in integration of the Currency Code in iVend with the Currency Code in SAP Business One.
Details Column	
Code	Enter the code for the denomination. A unique code of a maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the denomination. A description of maximum 100 alphanumeric characters can be entered.
Value	Enter the value for the denomination. The value cannot be same for two denominations.
[Add Detail]	Use this button to add the currency details like the denomination code, description and the value.
[Delete Detail]	The button enables to delete the selected row in the details column.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Exchange Rate

This feature allows user to define the Exchange Rates of the foreign currencies define in the system.

To open the screen, choose Administration > *Financial* > *Exchange Rate*.

Setup Screen

Field	Description/Activity
Base Currency Details	
Code	Displays the code of the currency base currency defined in the system. This local currency is setup in SAP Business One.
Description	Displays the description of the currency base currency.
Culture Information	Shows the culture information that is setup for this base currency in iVend. The currency symbol will be determined based on the culture information selected. E.g., if the Culture information selected is "English (United States)", the amounts will be displayed prefixed with the "$" sign.
Date Range	
From Date	Enter the date from which the exchange rate for the different currencies is to be set.
To Date	Enter the date until which the exchange rate for the different currencies is to be set.
Details Column	

Effective Date	By default, it shows the Current Date of the system and the exchange rates would be shown for the date. User can see the Exchange Rates for a date on changing the Effective date.
Currency	Display the code of the foreign currencies setup in the system. This is shown as one currency per column. Shows the relevant Exchange Rate for the selected Effective Date.
Exchange Rate	Show the relevant Exchange Rate for the selected Effective Date.
[Copy Exchange Rate]	Select the exchange rate that is to be copied. Pressing this button will copy the selected exchange rate to all the effective dates, subsequent to the selected effective date.
[OK]	The button closes the screen.
[Cancel]	The button closes the screen.

Payment Type

The field allows the user to map the various types of payment with the tender types. The tender types are hard coded and are not created by the user. The following tender types are available in the system:

Cash
Credit Card
Debit Card
On Account
Check
Travelers Check
Voucher
Custom
Gift Certificate
Foreign Currency
EBT
Store Credit

To open the screen, choose Administration > *Financial* > *Payment Type*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the payment type to be searched.
Description	Enter the description of the payment type(s) to be searched.
Search Results	
Code	Displays the code of the payment type searched.
Description	Displays the description of the payment type searched.
Display Order	Displays unique Order specified will determine the order in which the payment type will be displayed on the *Payment Screen* at the POS.

Subsidiary	Displays the Subsidiary of the Payment Type searched.(If Subsidiary is enabled)

SETUP SCREEN

Field	Description/Activity
General	
Code	Enter the code for the payment type. A unique code of a maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the payment type. A description of maximum 100 alphanumeric characters can be entered.
Subsidiary	Select a Subsidiary to which the Payment Type belongs from the list of Subsidiary(s). Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field will be available if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Type	Select one of the following tender types: Cash Credit Card Debit Card On Account Check Traveler Check Voucher Custom Gift Certificate Foreign currency Store Credit EBT The payment type 'cash' is selected by default. Every payment type can be defined only once.
Currency	Displays system's base currency. If subsidiary is enabled, it displays currency as per selected subsidiary and Type is other than Custom.
Counted	Select this option if the user wants the payment type to be counted during a till count. For the payment type 'Cash' and 'Multicurrency' this option is enabled by default and is mandatory. For the other payment types if the option is selected it enables a count of the related documents during the till count. E.g., for 'Credit Card' it can be a count of the merchant's copy of the credit card receipt.
Count Type	Select one of the following count types: • **None**: This option is selected if the checkbox 'Is Counted' is not enabled.

	• **Summary**: If this option is selected, during a till count, only the total count of the amount and documents for that payment type needs to be entered. • **Detail**: If this option is enabled, the 'Details' button at the 'Till Count View' screen is enabled thus allowing the user to enter the count of the cash as per the denomination.
Display Order	Enter a unique number for the display order. The order specified will determine the order in which the payment type will be displayed on the *Payment Screen* at the POS.
Active	Select the option to make this payment type available in the Payment screen at POS. By default this is enabled.
Default Amount	Enter the amount you want to be displayed by default on the payment screen of the POS for the transaction done through the particular payment type. For example, if the default amount is entered as 200 for cash, for every transaction done through cash the default amount displayed will be 200. The POS user can change it if required. If the default amount is entered as -1 the balance due amount is displayed in the payment screen.
Min Amount	Enter the minimum amount required to use the specified payment type for a transaction at POS. For example, A credit card purchase might not be accepted for transactions below $100.
Max Amount	Enter the maximum amount that can be transacted through the payment type at the POS. For example, Cash might not be accepted for transactions above $1000.
Authorised	Select the option if the user wants a payment type to be authorized through any payment processor. Applicable for only credit card and debit card payment types.
Use Test Payment Processor	Select this option if you would allow the credit/debit cards payments to be approved by the Test Payment Processor. Setting this would mean that the payment will not be validated though the payment processor and therefore the amount processed by this will not be deposited in your bank.
Refundable	Select this option if the user wants a payment type to be used as a mode of payment at the POS for "Sale Refund" Transaction.
Require Signtaure	Select this option if the customer's signature is required to be captured in case the payment is being made from this payment type.
Print Payment Receipt	Select this option if the user wants a payment receipt to be printed at the POS on the completion of a transaction through the specified payment type.
Payment Receipt Format	Enter the format for the receipt selected. The format is defined in XML. Payment Receipt format can be defined in two way : 1. Copy and paste the XML format deirectly in the drop down. 2. Click on […]; receipt search screen will be opened with receipt formats filtered by selected receipt type. Select the required format and click OK.

Print Payment Receipt Count	Enter the number of receipts to be printed for the payment type at the POS. For example, for 'credit card' the user needs 2 receipts, a customer copy and a merchant copy.
Open Cash Drawer	Select this option if the cash drawer needs to be opened automatically at POS on receiving the payment for this payment type.
Rounding Method	Select one of the rounding methods from the following available options: • **No Rounding** – The amounts in the system would not be rounded off and would be saved and displayed as it is. • **Round to Five Hundredth** – The amounts in the system would be rounded to the nearest five hundredth value based on the rounding type specified in the Enterprise Settings. For example, if the rounding type specified is "Round Up" and the transaction amount is 20.31, the amount will be rounded off to 20.35 • **Round to One Hundredth** – The amounts in the system would be rounded to the nearest one hundredth value based on the rounding type specified in the Enterprise Settings. For example,, if the rounding type specified is "Round Down" and the transaction amount is 20.36, the amount will be rounded off to 20.30 • **Round to One** – The amounts in the system would be rounded to the nearest currency value based on the rounding type specified in the Enterprise Settings. For example, if the rounding type specified is "Round to nearest" and the transaction amount is 20.45, then the amount is rounded off to 20, and if the amount is 20.50, it is rounded off to 21. • **Round to Ten** – The amounts in the system would be rounded to the nearest currency value based on the rounding type specified in the Enterprise Settings. For example, if the rounding type specified is "Round to nearest" and the transaction amount is 24.45, then the amount is rounded off to 20 and if the amount is 25.45, it is rounded off to 30. • **Round to Fifty** – The amounts in the system would be rounded to the nearest currency value based on the rounding type specified in the Enterprise Settings. For example, if the rounding type specified is "Round to nearest" and the transaction amount is 123.45, then the amount is rounded off to 100, and if the amount is 133.45, it is rounded off to 150. • **Round to Hundred** – The amounts in the system would be rounded to the nearest currency value based on the rounding type specified in the Enterprise Settings. For example, if the rounding type specified is "Round to nearest" and the transaction amount is 145, then the amount is rounded off to 100, and if the amount is 151, it is rounded off to 200.
Integrated with ERP	User would have the option to mark a payment as an Integrated one or a non-Integrated one. If the payment type is marked as *Not Integrating to ERP* then those payments would not get posted back to SAP Business One and the user would not be able to see those payments in SAP Business One. This option would be available for those payment types, which are of type *Custom*.

	If the tender is marked as being Integrated with ERP then the user system would not allow the user to mark the tender as either *Treat as On Account* or *Information Tender*. If the tender is marked as being Integrated with ERP then only the system would allow the user to set the tender as being *Over* tenderable.
Treat as On Account	User has the option to make a custom tender behave as an OnAccount tender behaves. The system would apply all checks as it does in case of an OnAccount type of tender. This option would be available for those payment types that are of type User Defined. If the tender is marked Treat as On Account then the user system would not allow the user to mark the tender as either Integrated to ERP or Information tender.
Information Tender	User has the option to make a custom tender behave as an information capture tender. Any payment taken against the information tender would not have any impact on the total payments taken against the transaction. This option would be available for those payment types that are of type User Defined. If the tender is marked as Information Tender then the user system would not allow the user to mark the tender as either Integrated to ERP or Treat as On Account.
Require Manager Authorization	Select this option if user wants to ensure that the Manager Authorizes this payment collected from this tender type.
Required Manager Authorization For Refunds	Select this option if user wants to ensure that the Manager Authorizes the refunds that are being done to the customer using this tender type.
Mask Card Number	Check this flag if you would like to hide the number of credit card being entered from the cashier.
Tender	
Allow Over Tender	Select this option to enable the customer to pay more than the total amount due. For example, if the customer has a total amount of $80 to be paid, he may pay $100 and take back $20 as cash.
Over Tender Rate Type	Select this if the user wants the over tender rate to be specified in amount or percentage in the following field.
Over Tender Rate	Enter the value of the over tender rate in amount/percentage as per the type specified.
Affects Tipple Point	Select this option if the user wants the payment type to affect the upper limit of the till amount (tipple point). The field is automatically enabled for the payment type 'cash'.
Allow Partial Tendering	Select this option if you would like to allow the partial redemption of the Gift Certificate. If this setting is turned on then the customer would be able to redeem the issued gift certificates in parts.

Set up	In case of a Custom tender, clicking on this button would open the Payment Type Attribute Setup screen.
[Store Applicable]	From here, the user can define on which stores this tender type would be available for the payment collection from customer. By default, the tender type is assigned to all the stores and is user editable.
[Surcharge]	The button will open a screen from where the surcharges on the payment type can be defined.
[Discount]	This button will open a screen from where the discounts on the payment type can be defined.
[OK]	The button saves the changes and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Payment Type Attribute

User would be able to setup the attributes for each user defined payment type that he has defined in the system. Depending on how many and what type of attributes have been setup by the user the same would be asked by the system while taking a payment at the POS against the payment type.

System would allow the user to setup only 10 attributes per Custom Payment type.

System would list all the attributes setup by the user against the payment type. User would have the option to Add or Edit attributes. Once an attribute has been saved, the system would not allow the user to delete the attribute.

Search Screen

Field	Description/Activity
Id	Enter the id of the attribute. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the surcharge. A description of maximum 100 alphanumeric characters can be entered.
Type	Displays the type of the attribute as defined by the user.
Add	Allows the user to add a new attribute to the existing list. The Payment Type Attribute screen is shown to the user.
Edit	Allows the user to edit the details of an existing attribute to the existing list. The Payment Type Attribute screen is shown to the user with the details filled in.
Copy	Allows the user to copy the details of an existing record and the save the details as a new attribute. The Payment Type Attribute screen is shown to the user.
Delete	Allows a user to delete a record from the list. System would not allow the user to delete an attribute, which has already been saved and used in any of the payment type.
OK	The button saves the changes and closes the screen.

Cancel	The button does not save any changes and closes the screen.

Setup Screen

Field Name	Description
Id	Displays the Id of the attribute as defined by the user.
Description	Displays the description of the attribute as defined by the user.
Type	Displays the type of information that the user wants to be captured while processing the payment taken against this payment type. Valid values are: 1. String 2. Numeric 3. Date 4. Boolean This field would not be editable in edit mode
Is Required	Allows the user to specify whether this information is mandatory for the user to provide at the time of payment processing.
Is Masked	Allows the user to specify whether this information will be masked.
Minimum String Length	If the attribute has been defined as being of String type then the user can define the minimum length of the value which the user to enter at the time of payment processing. Minimum string length should be equal to or more than Zero. If the IsRequired field is ticked then the Minimum length should be greater than One.
Maximum String Length	Similarly, the user can also define the Maximum length of the value that the user can enter. Maximum length cannot exceed 255.
Numeric Minimum value	If the attribute has been defined as of being Numeric type then the user can define the minimum value below which the system would not accept the input.
Numeric Maximum value	If the attribute has been defined as of being Numeric type then the user can define the maximum value beyond which the system would not accept the input.
Minimum Date	If the attribute has been defined as of being Date type then the user can define the minimum value below which the system would not accept the input.
Maximum Date	If the attribute has been defined as of being Date type then the user can define the maximum value beyond which the system would not accept the input.
Is Active	Whether the record is active or not.

Ok	Saves the details and closes the screen.
Cancel	Does not save the changes and closes the screen.

Tax Code

The field allows the user to search the code and the description of the various tax codes set up. Tax Codes are set up in the SAP Business One and replicated in iVend.

To open the screen, choose Administration > *Financial* > *Tax Code*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the tax code to be searched.
Description	Enter the description of the tax code(s) to be searched.
Search Results	
Code	Displays the code of the tax code searched.
Description	Displays the description of the tax code searched.
Rate	Displays the tax rate applicable
Subsidiary	Displays the Subsidiary of the Tax Code searched.(If Subsidiary is enabled)

Setup Screen

Field	Description/Activity
General	
Code	Enter the code for the tax code. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the tax code. A description of maximum 100 alphanumeric characters can be entered.
Rate	Enter the rate for the tax code.
Current Rate	Enter the current rate for the Tax code.
Surcharges	Check this value if the tax code is applicable as a surcharge.
Tax Exempt	Check this value if the tax code is tax exempt.
Tax Type	Select the tax code type. The valid values are- • Input • Output • Both
Load on Item Cost	
Subsidiary	Select a Subsidiary to which the Tax code belongs from the list of Subsidiary(s). Click [...] to open the Subsidiary Search screen and select the Subsidiary.

	This field is available if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Details	
Start Date	Enter the Start date for the Tax code validity period.
Tax Rate	Enter the tax rate for the Tax code validity period.
[OK]	The button closes the screen.
[Cancel]	The button closes the screen.

Tax Events

This allows the user to search the code and the description of the various tax events set up. To open the screen, choose Administration > *Financial* > *Tax Events*.

Search Screen

Field	Description/Activity
Search Criteria	
Id	Enter the Id of the tax event to be searched.
Description	Enter the Description of the tax event to be searched.
Start Date	Enter the start date for the search criteria of the tax events.
End Date	Enter the End Date for the search criteria of the tax events.
Search Results	
Id	Displays the Id of the Tax Event.
Description	Displays the description of the Tax Event.
Start Date	Displays the start date of the Tax Event
End Date	Displays the End Date of the Tax Event.
Subsidiary	Displays the Subsidiary of the Tax Event searched.(If Subsidiary is enabled).

Setup Screen

Field	Description/Activity
General	
Id	Enter the Id for the tax event. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the tax event. A description of maximum 100 alphanumeric characters can be entered.
Start Date	Enter the Start date for the Tax Event validity period.
End Date	Enter the End date for the Tax Event validity period.
Subsidiary	Select a Subsidiary to which the Tax Event belongs from the list of Subsidiary(s). Click [...] to open the Subsidiary Search screen and select the Subsidiary.

	This field is available if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Details	
Source Type	Enter the source type on which the tax has to be override for a period. Select Source Type from the below available values. • Customer • CustomerGroup • Product • Product Group
Source	Select the source based on the selected Source Type.
Tax Code	Click on the lookup button on tax code field to specify the tax code for the tax event period for the selected source.
Buttons	
[Add Detail]	Add a blank row in the details section.
[Delete Detail]	Delete the selected detail row of tax event.
[OK]	The button closes the screen.
[Cancel]	The button closes the screen.

Tax Condition Setup

Using Tax Condition setup, a user can setup Tax Conditions based on different conditions like customer, product, warehouse, minimum price, maximum price, product attributes and product user defined values and so on.

To open the screen, choose *Administration > Financial > Tax Condition Setup*.

Setup Screen

Field	Description/Activity
Subsidiary	Select a Subsidiary to which the Tax Condition belongs from the list of Subsidiary(s). Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field is available if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Customer Type	Select any one of the following Customer Type: • **Customer**: Select this, if the tax code condition is to be setup for a particular customer. • **Customer Group**: Select this, if the tax code condition is to be applied for all the customers falling under a customer group. • **Vendor:** Select this, if the tax code condition is to be setup for a particular vendor. • **Vendor Group:** Select this, if the tax code condition is to be applied for all the vendors falling under a vendor group.

	• **None**: Select this, if the tax code condition is independent of the customer.
Customer	Based on the Customer Type select the value from lookup. If subsidiary is enabled, customer search gets filtered as per selected subsidiary.
Product Type	Select any one of the following Product Type: • **Product**: Select this, if the tax code is to be setup for a particular product. • **Product Class:** Select this, if the tax code condition is to be applied for all the products falling under a product class. • **Product Group**: Select this, if the tax code condition is to be applied for all the products falling under a product group. • **None**: Select this, if the tax code condition is independent of the product.
Product	Based on the Product Type, select the value from lookup. If subsidiary is enabled, product search gets filtered as per selected subsidiary.
Warehouse Type	Select any one of the following Warehouse Type: • **Warehouse**: Select this, if the tax code condition is to be setup for a particular warehouse/store. • **Store Group**: Select this, if the tax code condition is to be applied for all the stores, which are falling under a store group. • **None**: Select this, if the tax code condition is independent of the warehouse on which the transaction will be performed.
Warehouse	Based on the Warehouse Type, select the value from lookup. If subsidiary is enabled, warehouse search gets filtered as per selected subsidiary.
Minimum Price	Enter the minimum price criterion an item if the tax code condition is based on the price of an item.
Maximum Price	Enter the maximum price criterion an item if the tax code condition is based on the price of an item.
Condition	Select one of the following Conditions: • **ShipTo_Zip**: Select this, if the tax code condition is to be setup for a particular zip code of the fulfillment address. • **ShipTo_City**: Select this, if the tax code condition is to be setup for a particular City of the fulfillment address. • **ShipTo_County**: Select this, if the tax code condition is to be setup for a particular County of the fulfillment address • **ShipTo_State**: Select this, if the tax code condition is to be setup for a particular State of the fulfillment address. • **ShipTo_Country**: Select this, if the tax code condition is to be setup for a particular Country of the fulfillment address.

	• **None**: Select this, if the tax code condition is independent on the fulfillment address of the transaction.
Condition Value	Based on the Condition specified above, enter the condition value that is to be matched.
Tax Code	Select the Tax Code that should be applied based one the tax condition setup. If subsidiary is enabled, Tax code search gets filtered as per selected subsidiary.
Attribute	Select the attribute of which the tax condition is to be applied. User can select up to 3 product attributes on which the specified tax code is to be applied.
Attribute Value	Enter the value of the Attribute to be matched while determining the tax code.
UDF	Select the UDF on which the tax condition is to be applied. User can select up to 3 product UDFs on which the specified tax code is to be applied.
UDF Value	Enter the UDF value to be matched while determining the tax code.
From Date	Enter the date from which the tax conditions is to be applied.
To Date	Enter the date till which the tax conditions is to be applied.
From Time	Enter the time from which the tax conditions is to be applied.
To Time	Enter the time till which the tax conditions is to be applied.
[Add Condition]	Allows the user to add a Tax Condition detail line.
[Delete Condition]	Allows the user delete the selected Tax Condition detail line(s).
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Surcharge

A surcharge is an extra amount charged on the transaction for various purposes like special services, cancellation charges, late fees, etc. In some cases, a surcharge can be applied automatically.

Use this feature to define new surcharges and view the details of the surcharges already setup in the system.

To open the screen, choose *Administration > Financial > Surcharge*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the surcharge to be searched.
Description	Enter the description of the surcharge to be searched.
Search Results	
Code	Displays the code of the surcharge searched.

Description	Displays the description of the surcharge searched.
Amount Type	Indicator whether the surcharge is calculated as percentage of the transaction amount or as a fixed amount.
Amount	Displays the amount of surcharge (fixed amount or percentage).
Subsidiary	Displays the Subsidiary of the Surcharge searched.(If Subsidiary is enabled)

SETUP SCREEN

Field	Description/Activity
Code	Enter the code of the surcharge. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the surcharge. A description of maximum 100 alphanumeric characters can be entered.
Subsidiary	Select a Subsidiary to which the Surcharge belongs from the list of Subsidiaries. Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field is available if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Amount Type	Select if the user wants to specify the surcharge as a percentage of the transaction amount or as a fixed amount. By default, the type selected is 'Amount'.
Amount	Enter the amount of surcharge (fixed amount or percentage) as per the *Amount Type* specified.
Discountable	Select this option if discounts can be given on the surcharge at the POS.
Refundable	Select this option if the surcharges will be refunded able. If not checked, the sale refund transaction will not include the surcharge amount.
Taxable	Select this option to allow tax on the surcharge amount.
Sale Tax Code	Select a code from the list of tax codes available. Click … to open the *Tax Code Search* screen and select the code. This will be the default sales tax code for all transactions. Sales tax codes set for individual customers in the customer master will supersede this tax code. Separate tax codes for purchase and sales are required for countries like Australia and UK where input and output taxes are used. For other countries, the same tax code can be specified for both purchase and sale.
Purchase Tax Code	Select a code from the list of tax codes available. Click … to open the *Tax Code Search* screen and select the code.
Load on Item Cost	Check this flag in case the surcharge being created is to be added onto the item cost while calculating the weighted average price of an item.
Use as Payment Discount	Check this flag in case the specified surcharge is to be used while doing the reversal of the discount applied through the payment discount setup.

Surcharge while Refunds	
[Ok]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Bank

A Bank is used while doing the payments using the Check payment type.

To open the screen, choose *Administration > Financial > Bank*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the bank to be searched.
Description	Enter the description of the bank to be searched.
Search Results	
Code	Displays the code of the bank searched.
Description	Displays the description of the bank searched.
Subsidiary	Displays the Subsidiary of the bank searched. (If Subsidiary is enabled)

Setup Screen

Field	Description/Activity
Code	Enter the code of the bank. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the name of the bank. A name of maximum 100 alphanumeric characters can be entered.
Subsidiary	Select a Subsidiary to which the bank belongs from the list of Subsidiary(s). Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field is available if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
[Ok]	This button updates changes to the database and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.

Retail Profile

This enables in setting up the various POS related information, which can then be applied to some or all POS in the system. The retail profile can be specified at the User, POS, Store and Enterprise level.

If the retail profile is not specified at the POS level, the profile specified at the store to which the POS is mapped is picked. If it is not specified at the store level, the retail profile specified at the Enterprise level is picked.

To open the screen, choose Administration > *Retail Configuration* > *Retail Profile*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the retail profile to be searched.
Description	Enter the description of the retail profile to be searched.
Search Results	
Code	Displays the code of the retail profile(s) searched.
Description	Displays the description of the retail profile(s) searched.
Subsidiary	Displays the Subsidiary of the Retail Profile searched.(If Subsidiary is enabled)

Setup Screen

The only mandatory field in setting up a *Retail Profile* is the *Code* field. You may accept the default settings the system provides and make no other changes if so desired.

Field	Description/Activity
General	
Code	Enter the code of the retail profile. A unique code of a maximum 20 alphanumeric characters can be entered. This setting is mandatory.
Description	Enter the description of the retail profile. A description of a maximum 100 alphanumeric characters can be entered.
Subsidiary	Select a Subsidiary to which the Retail Profile belongs from the list of Subsidiaries. Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field will be available if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Department	Select a department from the list of departments. Click [...] to open the *Department Search* screen and select the department. To add a new department, press F3 or click on [F3 New] button in the Department Search screen.
Default Transaction Mode	Select one of the transaction modes as a default mode for the Retail Profile. For example, if the default mode selected is Sale, then the POS to which the retail profile is assigned will open in the Sale mode for every new transaction. The various transaction modes that can be set as default are: • Sale • Sale Exchange • Sale Refund
Auto Lock POS Timeout(in seconds)	Enter the time duration in seconds. It defines the duration after which the POS gets locked. The user will have to loin to continue the task at POS.
Idle Time Out (in seconds)	Enter the time duration in seconds. It defines the duration after which the flash screen is displayed at POS terminal if no work is being carried out.

Auto Close Complete Sale View (in seconds)	Enter the time duration in seconds. It defines the duration after which the "Complete Sale" screen at the POS gets closed.
Login Per Transaction	Select the option if the user has to login at the POS after every transaction.
Use Zip Validation	Select the option if the zip code of the customer is to be validated.
Show Transaction Grid Headers	Select the option if the user at the POS wants the headers of the grid in the transaction screen to be displayed.
Price Override Lower Limit	Enter the percentage value. The field defines the limit to which the user at the POS can reduce the price of the product.
Price Override Upper Limit	Enter the percentage value. The field defines the limit by which the user at the POS can increase the price of the product.
Keyboard Mode	Select one of the following keyboard modes: **US Block Keyboard** – Displays the keyboard in the sequence of the alphabets, i.e., A, B, C etc. **US Qwerty Keyboard** – Displays the keyboard as per the sequence in a QWERTY keyboard, i.e., Q, W, E, R, T, Y, U, I, O etc. The keyboard displayed at the POS will be as per the mode selected here.
Display Keyboard for Authorization	Select this checkbox to display virtual keyboard when logging-in for multi-level approval.
Transaction Mode Alignment	Select where the *Select Mode* popup screen displays on the POS transaction screen.
Open Item Edit View Automatically	Select this option if the user wants the 'Item Edit View' screen to open when a product is scanned.
New Row For Scan	Select the option if the user wants a new line to be created for every product scan during the transaction at the POS. For example, if the option is not checked and the same product is scanned twice, the quantity count in the *Quantity* field of the product is increased from 1 to 2 instead of showing the second scan as a separate line.
Open Item Edit View On Column Click	Select the option if the user wants that at POS the "Item Edit View" screen opens when the user clicks on the Price or Quantity field of a product in the transaction screen.
Refund Without Receipt	Select the option to enable the user at POS to do *Sale Refund* without the receipt. If this option is not checked, the *Sale Refund* mode at the POS is disabled. The user would need to search for the transaction using the *Transaction Search* button and then select the transaction to be refunded with a Sale Refund button found on that screen.
Exchange Without Receipt	Select the option to enable the user at POS to do *Sale Exchange* without the receipt. If the option is not checked, the *Sale Exchange* mode at the POS is disabled. The user would need to search for the transaction using the *Transaction Search* button and then select the transaction to be exchanged with a Sale Exchange button found on that screen.

Auto Update Change Amount In Payments	Select the option if the change amount due to the customer at the POS needs to be shown in the payment screen automatically. For example, if the customer has to be paid back an amount of $12.14 as change, a separate line with the payment type "Cash" will automatically be added with the change amount as $12.14. If the customer is paying by cash, the change due is displayed in the "Change Amount" column of the payment details screen. If this option is not selected, for non-cash payments, the POS user would need to manually add a line for the payment of change to the customer. For cash payment, the exact amount due from the customer would need to be entered in the payment screen in order to proceed with the completion of the payment.
Change Amount Currency	Specify the currency in which the change amount will be returned to the customer. If the base currency is selected then change amount will be displayed in the base currency, otherwise the foreign currency will be used for displaying the change amount at the POS.
Donation Product Setup	Select the product, which is to be used as the donation product when the transaction totals are to be rounded to the next dollar amount.
Refund for Promotional Items	Select the option if the user wants to enable sale refund on the promotional items at the POS.
Print Suspended Transaction	Select the option if the user wants to have the printout of the suspended transaction.
Delete Suspended Transaction At Day End	If this option is selected then at the Day End the suspended transactions will be deleted automatically. This setting is effective based on the profile attached to the store. Only those transactions will be deleted which do not have any authorized payments attached to it.
Auto Add Cashier as Sales Person	This field would capture whether the cashier is added to all the transaction line items as a sales person.
Warn if Transaction line item has no Sales person	If this flag is turned on then the system would show a warning message if any of the transaction line items does not have any sales person attached to it.
Mandatory Sales person per	If this flag is turned on then the system would not allow the cashier to complete the sale if any of the transaction line item doe s not have a sales person attached to it.
Transaction line item	Enter the maximum number of transaction items a transaction can have.
Show Negative Inventory Resolution	If this flag is turned on then the system would show the cashier the negative inventory resolution screen whenever the cashier tries to add this item in a transaction at POS and the inventory of an item is not available in store. On turning off this flag, it is assumed by the system that the user would always like to continue selling of the item despite of the negative inventory in store.
Use Quick Complete (Using Cash Payment Type)	User can enable/disable the Quick Complete button on POS using this setting. Clicking on this button on POS assumes that the customer would like to do the payment using Cash Payment Method. This button is used in the situations/POS where the transaction volume is very high.

Confirmation Required For Quick Complete	Quick complete button is used for completing the transaction at the POS assuming that the customer has paid the amount by cash. Thus, this feature enhances the transaction speed. If this flag is checked then system will ask for the confirmation from cashier if cashier clicks 'Quick Complete' button at POS.
Complete Tendering On Zero Balance	If this flag is checked then it is assumed that if the payment balance is zero at the POS then the cashier has tendered the transaction completely and the transaction would be automatically saved.
Restrict Search of Other POS Transaction	If this flag is checked then the cashier at the POS would only be able to search for the transactions that are done from that particular POS. By default this setting is set to false so that the cashier can search for all the transactions that is carried out in a store from any POS.
Use Last Selected Event For Next Transaction	If this flag is checked then the selected Event at the POS would be applied to all the consecutive transactions of a POS.
Open Product Search if Barcode is not Recognized	By default, a message is displayed if the product is scanned and system is not able to recognize the scanned barcode. Check this flag if there is need to open the product search screen if the barcode is not recognized by the system.
Allow Combining Multiple Transaction Refund in Single Transaction	Check this flag if you would allow cashier to combine refunds of different transaction in same transaction at POS. By default, iVend allows to refund multiple transactions in one transaction.
By Default Use Current Business Date in Transaction Search	Check this flag if you want cashier to use the current business date to be defaulted in the transaction search screen at the POS. If this flag is not checked then the dates are not defaulted at the POS and the cashier needs to define the date for which he wants to search the transaction.
Application Theme	Select the theme of iVend POS and Management console application.
Allow login if Business Date is not same as Current Date	If check then this setting would allow user to login in POS with a warning if the user's system date is not equal to business date of the system. If this flag is unchecked then the system would not allow user to login in POS if the system date is not equal to the business date of the system.
Allow recalling multiple suspended transactions	If checked then system will allow cashier to recall multiple suspended transactions and then combine all of these in a single sale transaction.
Log Voided Transaction	Check this flag user would like to start the logging of transactions being voided on the POS.
Maximum number of lines in Transaction	Enter the maximum number of transaction items that a transaction can support. This is generally used in cases where the pre-printed stationary is used while printing the receipt.
Enable printing for transaction review	Check this flag if user would like to enable preview of receipt before the transaction is completed at the POS.

POS Layout	Click the [**...**] button, select a layout from the Layout Search screen, and apply it to the retail profile.
Import File Delimiter	Specify the delimiter which is to be used for the text file imports for the inventory transactions. This is usefull in case the decimal separator is different than ".".
Show Available Items Only for Promotions/Upsells	Check this flag in case user would like to see only the products in upsell and promotions which has inventory available within store. This works in conjuction with the Allow Negative Inventory property available on the enterprise settings.
Barcode Scanning on POS	
Allow Product Scanning	Check this flag if the user is allowed to scan the product on the POS.
Allow Customer Scanning	Check this flag if the user is allowed to change the customer on POS by either scanning or entering the customer information from the scan area.
Allow Transaction Scanning	Check this flag if the user is allowed to fetch historical information by either scanning or entering the transaction id in the scan area.
Allow Sales Person Scanning	Check this flag if the user is allowed to fetch historical information by either scanning or entering the transaction id in the scan area.
Allow Coupon Scanning	Check this flag if the user is allowed to scan scanning or the coupon id in the scan area.
Allow Barcode Scanning of Loyalty Card	If the loyalty cards can be scanned from a barcode reader then check this flag.
Quick Button Panel	Specify the quick button panel template to show the button panels on the POS.
Matrix Product Information Panel	Specify the quick button panel template to show the product information on the matrix product view screen at the POS.
Manager Override Required	
Credit Limit Override	Select the option if a manager override is required at the POS when the customer is making an on account payment and the total outstanding amount against the customer exceeds the credit limit.
Reprint Transaction Receipts	Select the option if a manager override is required at the POS when the cashier wants to reprint the transaction receipts at the POS.
Change Sales Person In Special Order Edit	Select the option if a manager override is required at the POS for changing the sales person during the editing of the sales order.
Change Sales Person In Refunds	Select the option if a manager override is required at the POS for changing the sales person during the refund of the item.
Delete Suspended Transaction	Select the option if a manager override is required at the POS for deleting the suspended transaction.
Void Sale	Select the option if a manager override is required at the POS for voiding the sale transaction.
Void Item	Select the option if a manager override is required at the POS for voiding some items from the current transaction.

Transaction Mode Change	Select this option if a “Manager Override” is required at the POS when the cashier tries to change the transaction mode at the POS.
Customer Search	Select this option if a “Manager Override” is required at the POS when the cashier tries to search for a customer by Clicking the "Customer Search" button at the POS.
Product Search	Select this option if a “Manager Override” is required at the POS when the cashier tries to search for a product by Clicking the "Product Search" button at the POS.
Sale Information Edit	Select this option if a “Manager Override” is required at the POS when the cashier tries to edit the sale options at the POS.
Item Information Edit	Select this option if a “Manager Override” is required at the POS when the cashier tries to edit the transaction item at the POS.
Transaction Search	Select this option if a “Manager Override” is required at the POS when the cashier tries to search the previous transaction by clicking the "Transaction Search" button at the POS.
Fulfillment	Select this option if a “Manager Override” is required at the POS when the cashier tries to add or change the fulfillment details by clicking the "Fulfillment" button at the POS.
Return Product After Return Date Expired	Select this option if a “Manager Override” is required at the POS when the cashier tries to refund an item for which the return days have already elapsed.
Suspend/Recall	Select this option if a “Manager Override” is required at the POS when the cashier tries to Suspend or Recall the transaction at the POS.
Product Surcharge Waiver While Return	Select this option if a “Manager Override” is required at the POS when the cashier tries to delete the retrun surcharges applied on the item.
Pole Display Message Details	
Complete Sale Message	The message is displayed at the completion of the sales transaction. Select a message from the list of pole display messages. Click [...] to open the *Pole Display Message Search* screen and select the message. To add a new message, press F3 or click on [F3 New] button in the *Pole Display Message Search* screen.
Idle Message	The message is displayed when no transaction is being processed at the POS. Select a message from the list of pole display messages. Click [...] to open the *Pole Display Message Search* screen and select the message. To add a new message, press F3 or click on [F3 New] button in the *Pole Display Message Search* screen.
Start Transaction Message	The message is displayed when the sales transaction begins. Select a message from the list of pole display messages. Click [...] to open the *Pole Display Message Search* screen and select the message. To add a new message, press F3 or click on [F3 New] button in the *Pole Display Message Search* screen.

Discount Details	
Max Sale Discount Percent Allowed	Enter the maximum discount percent that the user at the POS can give on a transaction.
Max Sale Discount Amount Allowed	Enter the maximum discount amount that the user at the POS can give on a transaction.
Max Line Discount Percent Allowed	Enter the maximum discount percent that the user at the POS can give on a line item in a transaction.
Max Line Discount Amount Allowed	Enter the maximum discount amount that the user at the POS can give on a line item in a transaction.
Reason Code Details Required	
Check Box	Select the option if you want to prompt the user to enter a reason for any of these activities at POS. • Cash In • Cash Out • Void Item • Void Sale • Open Cash Drawer • Price Override • Refund Item • Refund Sale • Line Item Tax Override • Sale Tax Override • Shutdown Terminal • Line Item Discount • Sale Discount • Expense • Deleting Suspended Transaction • Till Count Variance • Suspend Transaction
Comment Details Required	
Check Box	Select the option if you want to prompt the user to enter a comment for any of these activities at POS. • Cash In • Cash Out • Void Item • Void Sale • Open Cash Drawer • Refund Item • Refund Sale • Price Override • Line Item Tax Override • Sale Tax Override • Shutdown Terminal

	• Line Item Discount • Sale Discount • Expense • Deleting Suspended Transaction • Till Count Variance • Suspend Transaction
POS Wild Cards	
For Quantity	Enter the char that can be used a wild-card for changing the quantity of an item on the transaction.
For Price	Enter the char that can be used a wild-card for changing the price of an item on the transaction.
For Discount %	Enter the char that can be used a wild-card for changing the discount percent on an item on the transaction.
For Discount Amount	Enter the char that can be used a wild-card for changing the discount amount on an item on the transaction.
Email Receipts	
Email Receipt	Select this option if a user wants to send an e-Receipt for the transactions done at POS.
Email Address for Receipt	Enter the email id, which is used for sending out the e-Receipt.
Email Template	Select the e-Receipt template, which should be used while sending an email for the e-Receipt.
Report	Select the report in the system, which is to be used as the e-Receipt.
Receipt Sending Mode	Select the mode in which the system should operate. In other words, mode decide from where the e-Receipts are sent to the customer.
Customer Display Settings	
Type	Uncheck this flag in case you would like to hide the Transaction Type information from the customer display at the POS.
Product Code	Uncheck this flag in case you would like to hide the Product Code information from the customer display at the POS.
Description	Uncheck this flag in case you would like to hide the Product Description information from the customer display at the POS.
Discount	Uncheck this flag in case you would like to hide the Discount information from the customer display at the POS.
Quantity	Uncheck this flag in case you would like to hide the Quantity information from the customer display at the POS.
UoM	Uncheck this flag in case you would like to hide the Unit of Measure information from the customer display at the POS.
Price	Uncheck this flag in case you would like to hide the Pricing information from the customer display at the POS.
Total	Uncheck this flag in case you would like to hide the Line Total information from the customer display at the POS.

Row Height	Specify the height of the information row to be displayed on the customer display.
Font Size	Specify the font of the information row to be displayed on the customer display.
Show Payment Information	Uncheck this flag in case you would like to hide the payment information from the customer display at the POS.
Transaction Signature Capture	
Check Box	Check this flag, in case you would like to capture customer's signature for the following transaction modes on POS. • Sale • Sale Refund • Special Order • Layaway • Delivery • Quotation • Gift Certificate
[OK]	The button updates changes to the database and closes the screen. If the Retail Profile is edited, the changes come into effect at the POS only after the application is restarted at the POS.
[Cancel]	The button does not save any changes and closes the screen.

Subsidiary

Subsidiary feature allows defining multiple Subsidiaries.

This menu will be visible only after enabling Multiple Subsidiary from Enterprise setup screen.

To open the screen, choose *Retail Configuration > Subsidiary*.

Once Multiple subsidiary enabled, it is not possible to disable this functionality.

When enabling multiple Subsidiary, below changes will occur in the system.

- Default Subsidiary will be created by the system and assign to all applicable masters like Store, Warehouse, etc. and existing transactions
- Subsidiary field will be visible in respective masters setup view

Subsidiary columns will be visible in Search result screen for the respective masters, except for Product, Vendor, Customer, Employee, Loyalty (These masters can exist in multiple subsidiaries at the same time, remaining masters can exist in single subsidiary only).

Search Screen

Field	Type	Description/Activity
Search Criteria		
Code		Specify the code of the Subsidiary to be searched.
Description		Enter the description of the Subsidiary to be searched.
Search Results		
Code		Displays the code of the Subsidiary(s) searched.

Description	Displays the description of the Subsidiary(s) searched.

Data View Screen

Field	Description/Activity
Code	Enter the code of the Subsidiary. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the Subsidiary. A description of maximum 50 alphanumeric characters can be entered.
Default	Shows currency subsidiary is default or not. Read Only. Default subsidiary will be created by system only, when enabling Multiple Subsidiary from Enterprise setup screen.
Local Currency	Base currency defined for the Subsidiary. It may different from Base Currency.
Address	Displays the address of the store. Click *[...]* to open the Address screen and enter the address details.
Culture Info	Culture Information is same as Local Currency's Culture Information. After selecting the Local Currency this will be set by the system. The currency symbol will be determined based on the culture information selected. E.g., if the Culture information selected is "English (United States)", the amounts will be displayed prefixed with the "$" sign.
Time Zone	Time Zone for the Subsidiary
Tax Inclusive	Flag to specify Tax Inclusive or not. While creating new product, System applies this flag to it.
Assign To Existing Products	Flag for assigning existing Products to this Subsidiary, while creating the Subsidiary.
Assign To Existing Customers	Flag for assigning existing Customers to this Subsidiary, while creating the Subsidiary
Assign To Existing Vendors	Flag for assigning existing Vendors to this Subsidiary, while creating the Subsidiary
Assign To Existing Employees	Flag for assigning existing Employees to this Subsidiary, while creating the Subsidiary
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Address

This feature enables to setup the address details. It enables to setup multiple billing and shipping address for a single customer/vendor/ user depending on from which screen it being called. For example, if this screen is opened from the customer screen, the address is being setup for the customer.

This window can be opened through many ways as mentioned below:

- Choose *Administration > System Initialization > Enterprise > Address*.
- Choose *Administration > Retail Configuration > Warehouse > Address*.

- Choose *Administration > Human Resources > Employee > Address*.
- Choose *Operations > Business partner > Customer > Billing Address / Shipping Address*.
- Choose *Operations > Business partner > Vendor > Billing Address / Shipping Address*.

DATA SETUP SCREEN

Field	Description/Activity
Contact	Displays the contact person for the address being setup. Click [...] to open the Contact screen and enter the contact details.
Address 1, Address 2, Address 3	Enter the address(s) of the user.
City, Zip Code, County	Specify the address details of the user.
Country, State	Select the country and state to which the user belongs. The "State" field is enabled only after the user selects the country.
Phone No., Alternate Phone No., Fax No	Specify the communication details of the user.
Purchase Tax Code	Enter the default Purchase Tax Code of the user. If the address window is opened through *Administration > Retail Configuration > Subsidiary > Address*, then this field will not be visible.
Sales Tax Code	Enter the default Sales Tax Code of the user. If the address window is opened through *Administration > Retail Configuration > Subsidiary > Address*, then this field will not be visible.
Street No	Enter the street no of the user.
Building	Enter the building no / name of the user.
Global Location Number	Enable the Global Location Number of the user. If the address window is opened through *Administration > Retail Configuration > Subsidiary > Address*, then this field will not be visible.
[Ok]	The button updates changes to the database and closes the screen.
[Cancel]	The button closes the screen.

Warehouse

Warehouses are setup in SAP Business One and replicated to iVend. A warehouse has to be specified for each store and can be one of the following types:

- **General**: A general warehouse is attached to the Head Office. For an Enterprise, multiple General warehouses can be setup.

- **Retail**: A retail warehouse is attached to the Store. For a store, only one warehouse can be setup.
- **In transit**: "In transit" warehouse is a virtual warehouse. When stock is being transferred from one warehouse to another, the merchandise is considered to be in "in transit" warehouse until the time it is not received at the receiving warehouse. "In transit" warehouse is not available for selection whenever warehouse has to be specified for a store.

To open the screen, choose *Administration > Retail Configuration >Warehouse*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the warehouse to be searched.
Description	Enter the description of the warehouse(s) to be searched.
Search Results	
Code	Displays the code of the warehouse(s) searched.
Description	Displays the description of the warehouse(s) searched.
Warehouse Type	Displays the type of the warehouse searched.
Subsidiary	Displays the Subsidiary of the Store searched.(If Subsidiary is enabled)

Data View Screen

Field	Description/Activity
Code	Displays the code of the warehouse.
Description	Displays the description of the warehouse.
Address	Displays the address of the warehouse.
Subsidiary	Select a Subsidiary to which the warehouse belongs from the list of Subsidiary(s). Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field will be available if subsidiary is enabled. After selecting subsidiary - Sales Tax Code, Purchase Tax Code, In-transit warehouse – will be filtered as per selected subsidiary while searching for selection.
Sales Tax Code	Enter the default Sales Tax Code of the warehouse.
Purchase Tax Code	Enter the default Purchase Tax Code of the warehouse.
Warehouse Type	Displays the type of the warehouse.
In-transit Warehouse	Enter the Transit Warehouse Code of the warehouse.
Accounting ID	This is a system generated unique key for each warehouse, which helps in integration of the Warehouse Code in iVend with the Warehouse Code in SAP Business One.
Enable Location	Enable the Location functionality by checking this checkbox.

Allow Negative Inventory	Select this to allow the user at POS to make a sales transaction for a product that is out of stock as per system records. While creating a new warehouse record in the system, this setting is copied over from the Enterprise Settings. In case the setting is different from the Enterprise setting, user can change this on the warehouse master.
Use Warehouse Default Location	Enabling this checkbox will enable the functionality of using 'default location' as default location for all transaction type where the default location is not provided by the user. If this check box is unchecked, and default locations have not been defined for transaction type on warehouse screen,then the user will have to select the location manually on transaction screens.
Default Location	Displays the default Location for the Warehouse. It cannot be changed by the user. This location is enabled for all type of transactions.
Sales Location	Displays the default Sales Location for the Warehouse. Sales option for this location must be enabled.
Refund Location	Displays the default Refund Location for the Warehouse. Refund option for this location must be enabled.
Fulfillment Location	Displays the default Fulfillment Location for the Warehouse. Fulfillment option for this location must be enabled.
Goods Receive Location	Displays the default Goods Receive Location for the Warehouse. Goods Receive option for this location must be enabled.
Goods Issue Location	Displays the default Goods Issue Location for the Warehouse. Goods Issue option for this location must be enabled.
Goods Return Location	Displays the default Goods Return Location for the Warehouse. Goods Return option for this location must be enabled.
[Cancel]	The button closes the screen.

Store Group

Store group provides the flexibility of grouping the multiple stores based on their pricing, taxation and inventory needs.

- **Pricing Store Group:** Price list can be attached to a pricing store group and therefore all the stores falling under this group would have a same price list applicable.
- **Taxation Store Group:** Stores can be group based on their Taxation and then this store group can be used to setup different Tax Condition within iVend.
- **Inventory Store Group:** Different warehouses can be clubbed together using an Inventory store group. Store would only be able to see the inventory or do inventory transactions with the stores/warehouses, which are in his inventory store group, or the stores/warehouses, which are not part of any inventory, store group.

To open the screen, choose Administration > *Retail Configuration > Store Group*.

Search Screen

Field	Description/Activity

Search Criteria	
Code	Specify the code of the store group to be searched.
Description	Enter the description of the store group to be searched.
Group Type	Specify the group type of the store group to be searched.
Search Results	
Code	Displays the code of the store group(s) searched.
Description	Displays the description of the store group(s) searched.
Group Type	Displays the group type of the store group(s) searched.
Subsidiary	Select a Subsidiary to which the store group belongs from the list of Subsidiary(s) Click [...] to open the Subsidiary Search screen and select the Subsidiary.
Price List	Select a price list to which the store group belongs from the list of price lists. Click [...] to open the Price List Search screen and select the Price List.

Setup Screen

Field	Description/Activity
Code	Enter the code of the store group. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the store group. A description of maximum 100 alphanumeric characters can be entered.
Group Type	Select one of the following values • Pricing • Taxation • Inventory
Subsidiary	Select a Subsidiary to which the Store Group belongs from the list of Subsidiaries. Click [...] to open the Subsidiary Search screen and select the Subsidiary. This is visible if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Price List	If the pricing store group is selected in the Group Type then select a price list from the list of price lists. Click [...] to open the *Price List Search* screen and select the price list.
[Add Store]	Select the store to be associated with this store group.
[Delete Store]	Removes the selected store from this store group.
Price List	Click this button to open the Store Price List screen and add/delete a price list for the selected store. You can select multiple price list and set their effective date. This will help user to setup different prices for the store based on the effective dates.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

This feature enables the user to search for stores and setup new stores in the management console. The POS setup in the system is mapped to the store.

To open the screen, choose Administration > *Retail Configuration* > *Store*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the store to be searched.
Description	Enter the description of the store(s) to be searched.
Search Results	
Code	Displays the code of the store(s) searched.
Description	Displays the description of the store(s) searched.
Subsidiary	Displays the Subsidiary of the Store searched.(If Subsidiary is enabled)

Setup Screen

Field	Description/Activity
Code	Enter the code of the store. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the store. A description of maximum 100 alphanumeric characters can be entered.
Store Type	Select one of the valid values: • **Retail Store:** This is selected by default. • **Web Store:** This option would only be visible only if the user has web store license.
Subsidiary	Select a Subsidiary to which the store belongs from the list of Subsidiary(s). Click [...] to open the Subsidiary Search screen and select the Subsidiary. After selecting subsidiary - Selling Warehouse, Retail Profile, Cash Customer, Purchase Tax Code, Sales Tax Code, Fulfillment Plan for Layaway/Special Order, Layaway Plan, Sales Person, Store Group, Price List – will be filtered as per selected subsidiary while searching for selection. This field will be available if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Selling Warehouse	Select a warehouse from the list of warehouses. Click [...] to open the *Warehouse Search* screen and select the warehouse. The selling warehouse of a store cannot be edited.
Address	Displays the address of the store. Click *[...]* to open the Address screen and enter the address details.
Email	Enter the e-mail address for the store.
Bank	Enter the name of the bank where the store has its account.
Bank Account	Enter the store's bank account number.

Retail Profile	Select a Retail Profile from the list of profiles. Click [...] to open the *Retail Profile Search* screen and select the profile. To add a new retail profile, press F3 or click on [F3 New] button in the *Retail Profile Search* screen.
Site Id	The field specifies the mode in which the management console is working. Management Console can be setup in one of the following modes: • **Pure HO**: No store is being setup for the management console. The value of Site Id for this mode is 0. • **Mixed (HO + Store)**: In this mode, one store can be assigned to the Head Office. The value of Site Id for this mode is 1. If the user clicks on +… management console is setup in the mixed mode. • **Store**: Multiple stores can be defined in this mode. The value for this mode is running serial numbers, starting from 2. This is system-generated value. Once the value for this field is set and saved in the database, it cannot be changed.
Enable Offine Store	The field specifies current store is enabled to support Offline POS.
Cash Customer	The field enables to specify a cash customer for the store. This default customer will be selected at the POS attached to the store so that the user at POS will not have to select the customer for every transaction. Select a cash customer from the list of customers. Click [...] to open the Customer Search screen and select the customer. To add a new customer, press F3 or click on [F3 New] button in the Customer Search screen.
Purchase Tax Code	Select a code from the list of tax codes. Click [...] to open the *Tax Code Search* screen and select a tax code. Separate tax codes for purchase and sales are required for countries like Australia and UK where input and output taxes are used. For other countries, the same tax code can be specified for both purchase and sale.
Sales Tax Code	Select a code from the list of tax codes. Click [...] to open the *Tax Code Search* screen and select a default tax code.
Fulfillment Plan for Special Order	Select a default fulfillment plan from the list of plans. Click [...] to open the Fulfillment Plan Search screen and select the plan. Only delivery type of plans are allowed to be attached as the default fulfillment plan for special orders. To add a new plan, press F3 or click on [F3 New] button in the *Fulfillment Plan Search* screen.
Fulfillment Plan for Layaway	Select a fulfillment plan from the list of plans. Click … to open the Fulfillment Plan Search screen and select the plan. The selected plan would be defaulted to all the layaway items in a transaction. To add a new plan, press “F3” or click on “F3 New” button in the Fulfillment Plan Search screen.
Layaway Plan	Select a default layaway plan from the list of plans. Click [...] to open the *Layaway Plan Search* screen and select the plan.

	To add a new plan, press F3 or click on [F3 New] button in the *Layaway Plan Search* screen.
Sales Person	Select a default sales person from the list of sales persons. Click [...] to open the Employee Search screen and select a sales person.
Reassign All Tills At End Of Day	Select this option if all the Master Tills are to be Reassigned to their default user/teams at the End Of Day.
Hardware Profile	Hardware profile is the profile of the peripherals that are attached to the store manager. This is used for setting up the scanner etc., at the Management Console so that the items can be scanned for the inventory transactions such as goods receipt, GRPO, inventory transfers etc.
Store Group (Taxation)	User has an option to attach a store group to this store. Setting this will enable the user to just update the Tax Code attached to the group instead of updating the default sales tax code for the individual stores.
Store Group (Pricing)	User has an option to attach a store group to this store. Setting this will enable the user to just update the pricelist to the attached group instead of updating the pricelist for the individual stores.
Price List	If the Store Group is not attached to this store, then user can select the pricelist from the list of available price list. The pricing of items at POS will be picked from the attached price list of the corresponding store.
Cost Price List	Select the cost price list from the list of the available price list. The cost price of an item will be picked up from this cost price list while doing a goods receipt and at the time of raising a purchase order.
Is On Premise	This is only visible in case iVend is not running in iVend Unplugged mode
Use Store Scheduler Service	When the store scheduler service has to be used for processing the Alert notification else Enterprise scheduler service will be used for the processing of Alert notifcations.
API Server	
Enable SSL	Select this option in case the Store APIs uses a SSL connection.
Full Server Address	Enter the Host Address where iVend Store APIs are configured.
Server Address	Enter the Host IP Address where iVend Store APIs are configured.
[Custom Series]	Click on the button to define the custom series of the customer, vendor and products for the store being defined.
Registered Handlheld Devices	Clicking on this button will show the list of handhelds connected to the specified store.
Price List	Click this button to open the Store Price List screen and add/delete a price list for the selected store. You can select multiple price list and set their effective date.
[OK]	The button updates changes to the database and closes the screen.

[Cancel]	The button does not save any changes and closes the screen.

Department

Departments can be setup to categorize the users. This is primarily used for reporting purposes.

To open the screen, choose *Administration > Retail Configuration > Department*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the department to be searched.
Description	Mention the description of the department(s) to be searched.
Search Results	
Code	Displays the code(s) of the department.
Description	Displays the description of the department(s).
Active	Indicator of whether the department is active or not.

Setup Screen

Field	Description/Activity
Code	Enter the code of the department. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the department A description of maximum 100 alphanumeric characters can be entered.
Active	Select this option if you want the department to be active and available for selection in lookups. By default this option is enabled.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

POS

The feature enables the user to search for POS and setup a new POS in the Management Console. The POS setup in the system is then assigned to the physical point of sale machine.

To open the screen, choose Administration > *Retail Configuration > POS*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the POS to be searched.
Description	Enter the description of the POS(s) to be searched.
Store Code	Enter the code of the store for which the POS(s) has to be searched.
Search Results	
Code	Displays the code of the POS(s) searched.
Description	Displays the description of the POS(s) searched.

Store	Displays the code of the store for which the POS(s) is searched.

SETUP SCREEN

Field	Description/Activity
Code	Enter the code of the POS. A unique code of a maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the POS. A description of a maximum 100 alphanumeric characters can be entered.
POS Type	Select the POS Type for the following options PC Based Mobile POS
Store	Select a store from the list of stores. Click *[...]* to open the *Store Search* screen and select the store. To add a new store, press "F3" or click on [F3 New] button in the *Store Search* screen.
Retail Profile	Select a retail profile from the list of profiles (Optional). Click *[...]* to open the *Retail Profile Search* screen and select the profile. To add a new retail profile, press "F3" or click on [F3 New] button in the *Retail Profile Search* screen.
Hardware Profile	Select a hardware profile from the list of profiles. Click *[...]* to open the *Hardware Profile Search* screen and select the profile. This indicates specifically which equipment is setup to work with the POS register. To add a new hardware profile, press "F3" or click on [F3 New] button in the *Hardware Profile Search* screen.
Hardware Id	This is a system generated unique key for each hardware profile. Once the hardware key is assigned, the POS cannot be then assigned to any other machine. If the POS needs to be assigned to any other machine, click on the X icon to clear this field.
Print Profile	Select a print profile from the list of profiles. Click *[...]* to open the *Print Profile Search* screen and select the profile. The print profile provides the print format definitions for the various types of documents to be printed from the POS. To add a new print profile, press "F3" or click on [F3 New] button in the *Print Profile Search* screen.
Department	Select a department from the list of departments. Click *[...]* to open the *Department Search* screen and select the department. This is set for reporting purposes. To add a new department, press "F3" or click on [F3 New] button in the *Department Search* screen.
Enabled	Select the option in order to make the POS available for assigning it at the Point of Sale machine. By default, the option is checked while setting up a new POS.
Off- Line Enabled	Check this check box to mark POS to work in offline mode.
Site Id	This field displays the site id.
Payment Processor Unique Identifier	Stores the POS specific information required by the configured Payment Processor. Payment processor to process payment transactions from POS will use this Identifier. For example, Datacap EMV payment system expects 3 digit unique Terminal ID for each PIN Pad connected to POS, to identify the payment device that processed particular payment transaction.
Default Sales Location	Specify the default sales location of the PoS in case the default sales location of the PoS is different from the PoS associated warehouse. This setting will

	only be visible in case the Locations are turned on for the associated warehouse.
Default Refund Location	Specify the default refund/return location of the PoS in case the default refund location of the PoS is different from the PoS associated warehouse. This setting will only be visible in case the Locations are turned on for the associated warehouse.
Default Fulfillment Location	Specify the default delivery/ fulfillment location of the PoS in case the default delivery/ fulfillment location of the PoS is different from the PoS associated warehouse. This setting will only be visible in case the Locations are turned on for the associated warehouse.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Retail Management Console

This feature allows the user to create and manage Management Consoles.

To open the screen, choose Administration > *Retail Configuration* > *Retail Management Console*.

Search Screen

Field	Description/Activity
Search Criteria	
Id	Enter the id of the management console to be searched.
Description	Enter the description of the management console to be searched.
Search Results	
Id	Displays the id of the management console (s) searched.
Description	Displays the description of the management console (s) searched.

Setup Screen

Field	Description/Activity
Id	Specify the Id of the Management Console to be used
Description	Specify the description of the Management Console to be used
Has License	Check this flag in case user likes to allocate a device based license to the Management Console. If a device based license is allocated, then any Management Console user can log in from this Management Console
Is Active	Check this flag to mark the Management Console as Active.
Site Id	Specify the site id to which this Management Console belongs. Enter value as 1 in case the records belong to Enterprise else enter the site id of the store.
Hardware Id	This is a system generated unique key for each hardware profile. Once the hardware key is assigned, the Management Console cannot be assigned to any other machine. If the Management Console needs to be assigned to any other machine, click on the X icon to clear this field.
[OK]	The button updates changes to the database and closes the screen.

[Cancel]	The button does not save any changes and closes the screen.

Reason Code

Reason Codes are defined for capturing extra information on some selected activities at the POS. The transaction types for which the reason code(s) can be setup are as follows:

- Cash In
- Cash Out
- Shutdown Terminal
- Open Cash Drawer
- Edit Time Clock
- Void Item
- Void Sale
- Refund Sale
- Refund Item
- Sale Discount
- Item Discount
- Item Price Override
- Item Tax Override
- Sale Tax Override

To open the screen, choose *Administration > Retail Configuration > Reason Code*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the reason code to be searched.
Description	Mention the description of the Reason Code(s) to be searched.
Type	Select one of the transaction types for which the reason code(s) is searched.
Search Results	
Code	Displays the code of the reason code(s) searched.
Description	Displays the description of the reason code(s) searched.
Type	Displays the type of the reason code(s) searched.

Setup Screen

Field	Description/Activity
Code	Enter the reason code. A unique code of a maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the reason code. A description of a maximum 100 alphanumeric characters can be entered.
Type	Select one of the activities for which the reason code(s) is being setup. By default 'none' is displayed.
Active	Select the option to mark the reason codes requirement as active. By default this option is selected.
[Ok]	The button updates changes to the database and closes the screen.

[Cancel]	The button does not save any changes and closes the screen.

Sale Attribute

The feature enables the user to setup extra information that may have to be captured at the POS while doing transaction apart from the standard data captured in the system. *For example,* the customer telephone number can be captured for each transaction.

To open the screen, choose Administration > *Retail Configuration* > *Sale Attribute*.

Search Screen

Field	Description/Activity
Search Criteria	
Name	Enter the name of the sale attribute to be searched.
Required	Select the check box if only records, which are mandatory to be entered at POS, need to be displayed.
Capture Type	Specify if the sale attributes being searched are the ones that need to be captured at the beginning of the sale or at the end of the sale.
Active	Enter the filter criteria.
Search Results	
Name	Displays the name of the sale attribute(s) searched.
Required	Displays if the value for the attribute is mandatory at the POS or not.
Capture Type	Displays the capture type of the attribute searched.
Is Active	Displays if the attribute is active or not.

Setup Screen

Field	Description/Activity
Name	Enter the name of the sale attribute. A name of maximum 50 alphanumeric characters can be entered. This name will appear in the title bar of the data-gathering window that will display at the register.
Sequence	Enter the sequence in which the attribute screen needs to be prompted at the POS. More than one screen can be set up to collect information.
Required	Select this option if the user at POS is required to enter the value in the attribute screen before the system will be allowed to proceed.
Capture Type	Select one of the following : • **Beginning of Sale** – Setting this option would prompt for the value of the attribute at the POS before the transaction begins. The option is enabled by default. • **End of Sale** – Setting this option would prompt the value of the attribute once the user at the POS completes the transaction by pressing F12 or the 'Complete' button.
Validation Type	Select from the type of validations: • **None**: No validation is applied by the system on the values entered by the user. • **Table**: The list of options for this field will be shown from a particular table defined in the Table Name field. • **Valid Values**: User can capture the list of valid values by clicking on the Details button. These valid values will then be shown to POS user while doing the transaction at the POS.
Default Value	Enter the default value of the attribute that would be displayed at the POS. The user at POS can change the value if required.

RegEx Pattern	Enter the Regular Expression, which is to be used for validating the data input by the POS user.
Table Name	Enter the Table Name from where the values are to be shown in a list format to the user in case the validation type is selected as "Table".
Is Integrated	Mark the flag if the captured information is to be integrated to SAP Business One document.
Integrated Field Name	Enter the name of the User Defined Field of SAP Business One to which this information is to be integrated.
Is Active	Select this option if the attribute is active.
Is Visible	Specifies whether the attribute is visible on the UI or not.
Checkbox	Select the transaction type on which the attribute is to be captured. • Sale • Sale Refund • Sale Exchange • Special Order • Layaway • Quotation • Gift Certificate • Coupon Issue • Delivery
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Transaction Item Attribute

The feature enables the user to setup extra information that may have to be captured at the transaction item level at POS while doing transaction apart from the standard data captured in the system.

To open the screen, choose Administration > *Retail Configuration* > *Transaction Item Attribute*.

Search Screen

Field	Description/Activity
Search Criteria	
Name	Enter the name of the attribute to be searched.
Required	Select the check box if only records, which are mandatory to be entered at POS, need to be displayed.
Active	Select the option on which the records are to be filtered.
Search Results	
Sequence	Display the sequence number of the transaction line attribute.
Name	Displays the name of the sale attribute(s) searched.
Required	Displays if the value for the attribute is mandatory at the POS or not.
Is Active	Displays if the attribute is active or not.

SETUP SCREEN

Field	Description/Activity
Name	Enter the name of the attribute. A name of maximum 50 alphanumeric characters can be entered. This name will appear in the title bar of the data-gathering window that will display at the register.
Sequence	Enter the sequence in which the attribute screen needs to be prompted at the POS. More than one screen can be set up to collect information.
Required	Select this option if the user at POS is required to enter the value in the attribute screen before the system will be allowed to proceed.
Validation Type	Select one of the following : • **None** – Setting this option would assume that the user wants to enter the free text for this and the data is not be validated from fixed set of values. The option is enabled by default. • **Table** – Use this option if user wants to validate the captured attribute values against values that are stored in table. • **Valid Values** – Setting this option if the user would like the cashier at POS to pick the attribute value from the list of predefined values.
Default Value	Enter the default value of the attribute that would be displayed at the POS. The user at POS can change the value if required.
RegEx Pattern	Enter the Regular Expression which is to be used for validating the input done by the user at the POS.
Table Name	If the user has selected the Validation Type as Table then user must define the table name in this field from where the data values are to be picked for validation. This has the following validations: • Table name must start with "U_". • Table must have Id Column with nvarchar (20). • Table must have Description Column. • Table must have Primary Key defined on the Id Column. • Table must exist in the database.
Is Integrated	Mark the flag if the captured information is to be integrated to SAP Business One document.
Integrated Field Name	Enter the name of the User Defined Field of SAP Business One to which this information is to be integrated.
Is Active	Select this option is the attribute is to be marked as active in the system.
Is Visible	Specifies whether the line attribute is visible on the UI or not.
[Add Value]	If the validation type selected by the user is Valid Values then user can click on this button to define the new valid value.
[Delete Value]	Click on this button to delete the value from the valid values list.
[OK]	The button updates changes to the database and closes the screen.

[Cancel]	The button does not save any changes and closes the screen.

Pole Display

The feature enables the user to search for the various pole display messages set up in the management console and create new messages.

To open the screen, choose *Administration > Retail Configuration > Pole Display*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the pole display message to be searched.
Description	Enter the description of the pole display message(s) to be searched.
Search Results	
Code	Displays the code of the pole display message(s) searched.
Description	Displays the description of the pole display message(s) searched.

Setup Screen

Field	Description/Activity
Code	Enter the code of the pole display message. A unique code of a maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the pole display message. A description of a maximum 100 alphanumeric characters can be entered.
Line 1 Details	
Line1 Message	Enter the message to be displayed on the pole display. A maximum of 50 alphanumeric characters can be entered in the message.
Line1 Blinking	Select this if the user wants the message in the line to blink.
Line1 Alignment	Select one of the following types of alignment for the message to be displayed: • **None**: No alignment is specified and the message displays on the left by default. • **Left**: The message displays on the left. This option is enabled by default. • **Right**: The message displays on the right. • **Center**: The message displays on the center.
Line1 Column	Specify the column number from which the user wants to start the message. The default value of this field is 0.
Line 2 Details	
Line2 Message	Enter the message to be displayed in the second line in the pole display. A maximum of 50 alphanumeric characters can be entered in the message.
Line2 Blinking	Select this if the user wants the message in the line to blink.

Line2 Alignment	Select one of the following types of alignment for the message to be displayed: • **None** - No alignment is specified and the message displays on the left by default. • **Left** - The message displays on the left. This option is enabled by default. • **Right** - The message displays on the right. • **Center** - The message displays on the center
Line2 Column	Specify the column number from which the user wants to start the message. The default value of this field is 0.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Hardware Registration

The feature supports registering the hardware DLLs (Dynamic Link Library). It is required to register a DLL for every hardware setup in the system.

To open the screen, choose *Administration > Retail Configuration > Hardware Registration*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the hardware register to be searched.
Description	Enter the description of the hardware register(s) to be searched.
Hardware Type	Select one of the following types of hardware for which the hardware register(s) has to be searched: Receipt Printer Document Printer Cash Drawer Pole Display Magstripe Reader Scale MICR Signature Capture Barcode Reader Fiscal Printer Electronic Invoice
Search Results	
Code	Displays the code of the hardware register(s) searched.
Description	Displays the description of the hardware register(s) searched.

Setup Screen

Field	Description/Activity
Code	Enter the code of the hardware register. A unique code of a maximum 20 alphanumeric characters can be entered.

Description	Enter the description of the hardware register. A description of maximum 100 alphanumeric characters can be entered.
Hardware Type	Select the type of hardware for which the hardware register is being setup.
Assembly Name	Displays the assembly name for the DLL. The value in this field is automatically displayed on selecting the DLL location.
Class Name	Displays the class name available in the DLL. Select the class name from the options available in the drop down.
[Config]	Click the button to configure the settings for the selected hardware type.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Hardware Profile

The feature enables the user to setup a hardware profile for the hardware(s) to be used at the POS. To connect the hardware to a POS, the hardware profile will have to be setup. It is not mandatory to assign a hardware profile to every POS setup in the system.

To open the screen, choose *Administration > Retail Configuration > Hardware Profile*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the hardware profile to be searched.
Description	Enter the description of the hardware profile(s) to be searched.
Search Results	
Code	Displays the code of the hardware profile(s) searched.
Description	Displays the description of the hardware profile(s) searched.

Setup Screen

Field	Description/Activity
Code	Enter the code of the hardware profile. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the hardware profile. A description of maximum 100 alphanumeric characters can be entered.
Receipt Printer Fiscal Printer Document Writer Cash Drawer 1 Cash Drawer 2 Pole Display Magstripe Reader Scale Barcode Reader	Select the hardware device(s) to be setup as a part of the profile being setup. Click … to open the Hardware Registration Search screen and select the required Hardware Registration(s). To add a new hardware register, press “F3” or click on [F3 New] button in the Hardware Register Search screen.

MICR Signature Capture Electronic Invoice	
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Payment Processor

The Payment Processor needs to be setup in the system if the Credit Card or Debit Card authorization is being done at the POS. This feature enables the user to define payment processors for the various account types. The various account types for which payment processor can be configured are:

Master Card
Visa
Amex
Diners Club
Discover
JCB
Others

To open the screen, choose *Administration > Retail Configuration > Payment Processor*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the payment processor to be searched.
Description	Enter the description of the payment processor(s) to be searched.
Search Results	
Code	Displays the code of the payment processor(s) searched.
Description	Displays the description of the payment processor(s) searched.

Setup Screen

Field	Description/Activity
Code	Enter the code of the payment processor. A unique code of a maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the payment processor. A description of maximum 100 alphanumeric characters can be entered.
Is Mobile Processor	Select this option if the specified payment processor is used for iVend mobile.
Account Type	Select one of the following types of account for which the payment processor is being setup: Master Card Visa Amex Diners Club

	Discover JCB Others By default the account type 'others' is selected. The option is used for account types other than the ones mentioned above.
Payment processor	Select the payment processor from the available list of payment processors.
Assembly Name	Displays the assembly name for the DLL. The value in this field is automatically displayed on selecting the location of the DLL.
Class Name	Displays the class names available in the DLL. Select the class name from the options available in the drop down.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Print Profile

This feature enables to set up the layout for various receipts printed in the system. The print profile is then assigned to the POS setup in the system. The receipts printed from the POS are in the format specified in the print profile assigned to the POS. The various types of receipts that can be setup in a profile are:

- Labor Chit
- Day Labor Chit
- Transaction Receipt
- X Tape Report
- Gift Receipt
- Quotation Receipt
- Coupon
- Cash In-Cash Out Receipt
- Gift Certificate
- Drawer Count Chit
- Expense Chit
- Z Tape Report
- Suspended Transaction Receipt

To open the screen, choose *Administration > Retail Configuration > Print Profile*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the print profile to be searched.
Description	Enter the description of the print profile(s) to be searched.
Search Results	
Code	Displays the code of the print profile(s) searched.
Description	Displays the description of the print profile(s) searched.

Setup Screen

Field	Description/Activity
General	
Code	Enter the code of the Print Profile. A unique code of maximum 20 alphanumeric characters can be entered.

Description	Enter the description of the Print Profile. A description of maximum 100 alphanumeric characters can be entered.
Detail Columns	
Type	Select one of the receipt types from the drop down.
Format Id	It is read only field and displays the id and description of selected receipt format.

Data	Use this field to select or enter the format for the receipt selected. The format is defined in XML. There are two options to define receipt format : 1. Copy and paste the XML format directly in the drop down. 2. Click on […]; receipt search screen will be opened with receipt formats filtered by selected receipt type. Select the required format and click OK.
Copies To Print	Enter the number of copies that are required to be printed for the receipt. The valid values are from 1 to 99.
Copies to Reprint	Enter the number of copies that are required to be printed when reprinting is done for the receipt. The valid values are from 1 to 99.
Print Type	Select one from the valid values • **XML Report**: This will print the XML receipt on the OPOS Receipt Printer. • **Crystal Report**: This will print the crystal report on the windows default printer. • **Show Printer Selection**: System will prompt for the selection of printer while printing the report.
[Add]	The button enables to add a new receipt type to the profile. Click on the button to add a row in the detail grid, select the receipt type, and enter the XML data.
[Delete]	The button enables the user to delete the selected receipt type from the print profile.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Event

The feature enables to setup events for grouping the data in the reports. An example of an event can be a clearance sale. Reports can be taken for that period to analyze customer preferences and trends in the sale of products.

To open the screen, choose *Administration > Retail Configuration > Event*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the event to be searched.
Description	Enter the description of the event(s) to be searched.

From Date	Enter the Date for which event(s) are to be searched.
To Date	Enter the Date for which event(s) are to be searched.
Is Active	Select the type of record being searched.
Search Results	
Code	Displays the code of the event(s) searched.
Description	Displays the description of the event(s) searched.

SETUP SCREEN

Field	Description/Activity
Code	Enter the code of the event. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the event. A description of maximum 100 alphanumeric characters can be entered.
Start Date	Enter the date on which the event would start. Click ▼ to open the calendar control and select the date. The default value for the field is the current date.
End Date	Enter the date on which the event ends. Click ▼ to open the calendar control and select the date.
Start Time	Enter the Start Time for the event.
End Time	Enter the End Time for the event.
Is Active	Select this option if the event is to be marked as active in the system.
[Store Applicable]	Clicking on the button open Store selection screen, from which the user can select the stores where the selected event would be applicable.
[Ok]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Discount Resolution Setup

Discount Group helps in determining how the discount should be calculated on an item in case when multiple discounts are applied on the same transaction item. The discounts has been categorized into four types of discounts:

- Manual Discount
- System Discount
- Coupon Discount
- Promotion Discount

Depending on the grouping done, the user can determine the relationship of a particular group with the next Discount Group.

To open the screen, choose *Administration > Retail Configuration > Discount Resolution Setup.*

SETUP SCREEN

Field	Description/Activity
	(Step 1) General - Define the Discount Groups

Manual	Specify the group number in which Manual discount would fall.
System	Specify the group number in which System discounts would fall.
Coupon	Specify the group number in which Coupon discount would fall.
Promotion	Specify the group number in which Promotional discount would fall.
(Step 2) Discount Resolution Definition - Select Sum of discounts or Maximum of discounts in a group	
Group 1	Select how discount should be calculated within Group 1.
Group 2	Select how discount should be calculated within Group 2.
Group 3	Select how discount should be calculated within Group 3.
Group 4	Select how discount should be calculated within Group 4.
(Step 3) Discount Relation - Define how are the groups related amongst themselves	
Between Group 1 and Group 2	Specify how Group 1 discount calculation is related with Group 2 discount.
Between Group 2 and Group 3	Specify how Group 2 discount calculation is related with Group 3 discount.
Between Group 3 and Group 4	Specify how Group 3 discount calculation is related with Group 4 discount.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Item Matrix Global Setting

This feature allows defining the global settings for the matrix items. These settings are inherited to the matrix products. User can change the matrix settings for the individual products.

To open the screen, choose *Administration > Retail Configuration > Item Matrix Global Setting*.

Setup Screen

Field	Description/Activity
General	
Space as Item Code Separator	Check this flag if while generating the item codes for the child products the Space should be used as a separator between the products attributes. For example, P0001 RD 32
Item code separator	Specify the separator that should be used while determining the code of the child products. For example, if the "-" is used as a separator then the child product would be P0001-RD-32. This setting is only enabled when "Space as Item Code Separator" flag is not set.

Space as Item Description Separator	Check this flag if while generating the item description for the child products the Space should be used as a separator between the products attributes. For example, Shirt Red 32.
Item Description Separator	Specify the separator that should be used while determining the description of the child products. For example, if the "-" is used as a separator then the child product would be Shirt-Red-32. This setting is only enabled when "Space as Item Description Separator" flag is not set.
Item Code and Description Abbreviation Length	
Item Code Length	Enter the number of characters that should be picked from the parent item code while generating the child item codes.
Item Description Length	Enter the number of characters that should be picked from the parent item description while generating the child item codes.
Item Code and Description Order	
Item Code Order	Enter the order in which the parent item code is picked while generating the child item codes. We recommend that this setting to be left as 1.
Item Description Order	Enter the order in which the parent item description is picked while generating the child item description. We recommend that this setting to be left as 1.
Buttons	
Product Inheritance Settings	On click of this button Item matrix inherit properties screen will be opened.
OK	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Product Inheritance Settings

This feature enables selection of parent product property settings, which will be inherited in matrix item. User can change settings for individual matrix items.

User can change the matrix settings for the individual products.
Use this feature to specify the sequence of the search criteria fields on all the search screens in the system.

To open the screen, choose *Administration > Retail Configuration > Item Matrix Global Setting > Inherit Properties*.

Setup Screen

Field	Description/Activity
Details	
Property Name	This grid column will list all the properties and UDFs of Product, which can be inherited to child matrix items. For more information, refer to Product and User Defined Fields.
On Insert	This column specifies that selected property will be inherited when a new product will be created.
On Update	This column specifies that selected property will be inherited when a product is being updated.
Buttons	
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Management Console Screen Customization

The feature allows the user to customize grids in management console screens. User can hide/unhide fields; move the fields forward and backward as per their requirement and save them for different display profiles. This facilitates the user to control the field level access for various users as per their job roles.

Display Profile

Display profile is used to save customization of a screen for a user or group of users under any role. Every security role will have a display profile attached to it. When a user with particular role logs in management console, corresponding customization will be applied to the screen. To create display profile

To open the screen, *Administration > Retail Configuration > Display Profile*.

Search Screen

Field	Description/Activity
Search Criteria	
Id	Specify the id of the display profile(s) to be searched.
Description	Mention the description of the display profile(s) to be searched.
Search Results	
Code	Specify the id of the display profile(s) to be searched.
Description	Mention the description of the display profile(s) to be searched.

Setup Screen

Field/Button	Description/Activity
Id	Enter the id of the display profile. A unique code of a maximum of 20 alphanumeric characters can be entered.

Description	Enter the description of the display profile. A description of a maximum of 100 alphanumeric characters can be entered.
Screen Name	This is view only field which displays the list of screen names for which customization is saved.
Control Name	This is view only field which displays the list of control names and control names for which customization is saved.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.
[Remove]	This button removes the customization of selected screen.

Figure 1 – Display Profile Screen

Apply Display Profile

Security role screen will have a field to apply display profile. Apply desired display profile to the security role.

To oepn screen - *Administration > Authorization > Security Role*.

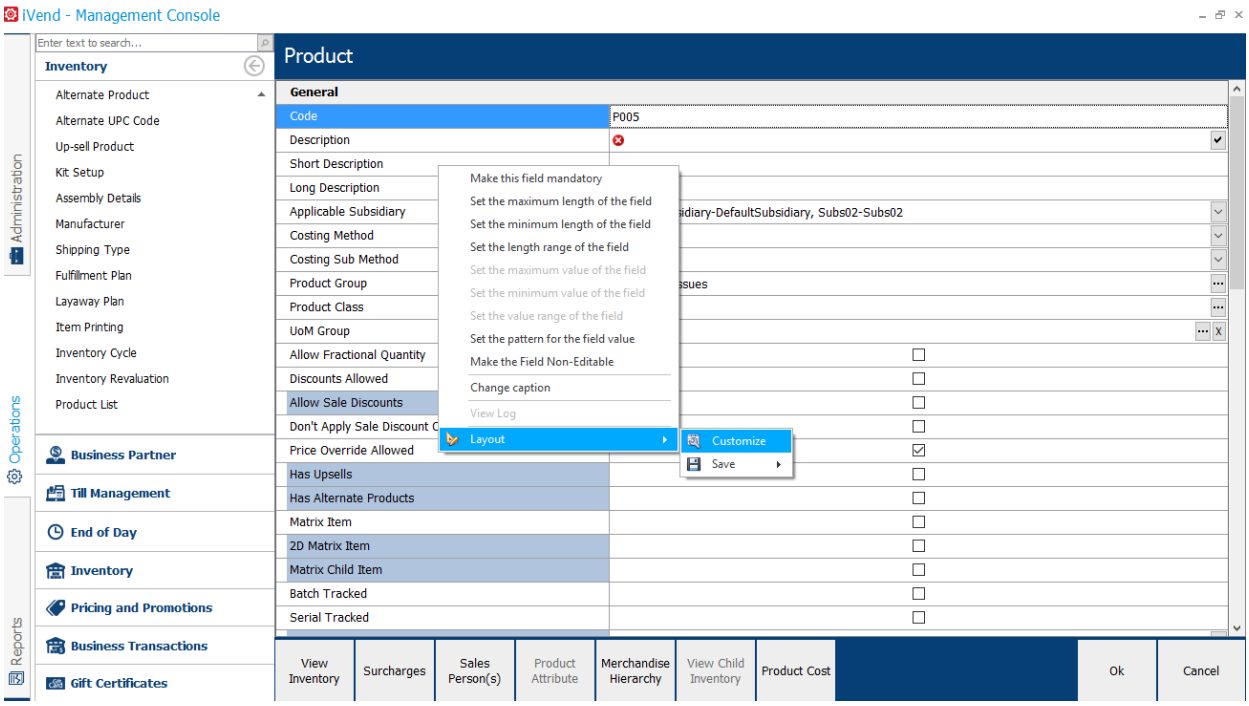
Save Customization under Display Profile

Enable Customization

Any user with securtiy rights for customization can rearrange the grid fields as per the requirements. To enable customization.

Right-click on any *view > Layout > Customize*.

User can add new category row or drag the row(s) to the customization window which is/are to be hidden. User can also control the visiblitiy of columns and move them at the required position in the grid.



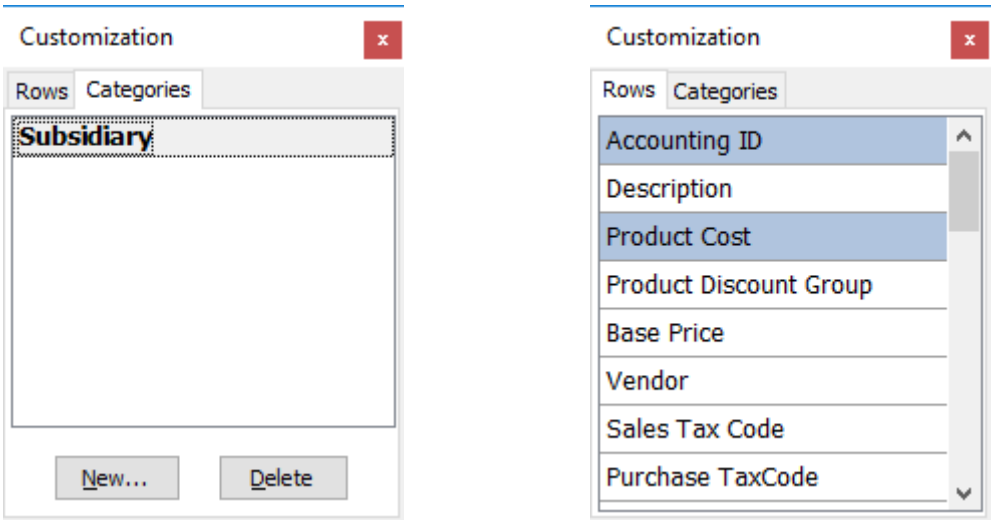
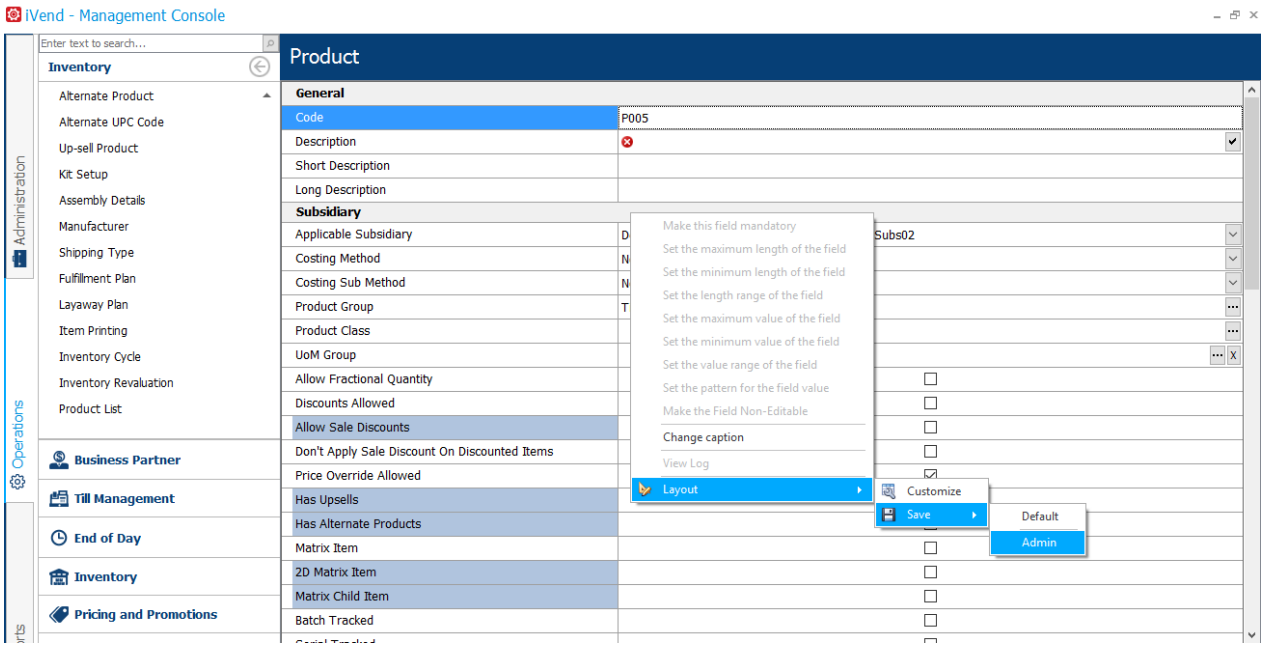


Figure 2 – Customization window

SAVE CUSTOMIZATION

To save customization, right-click on the view with unsaved changes > *Layout* > *Save* > *Display Profile*. The changed display settings will be saved under selected display profile.



When any user with this security role will log in, he will see the customized screen.

Receipt Print Format Customization

This feature facilitate the receipt customization process. User can create new receipt formats or update the existing formats as per the requirements. The WYSIWYG editor is powerful to help user in designing the receipts formats.

To open the screen, browse through *Administration > Retail Configuration > Receipt Print Format*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the receipt format to be searched.
Description	Enter the description of the receipt format to be searched.
Type	Select the receipt type to be searched.
Followup Format	Select the follow up format to search the receipts with specific follow up format.
Search Results	
Id	Displays the code of the format receipt(s) searched.
Description	Displays the description of the format receipt(s) searched.
Type	Displays the type of the format receipt(s) searched.
Follow up format	Display the attached follow up format for the format receipt(s) searched.

Data Setup Screen

Field	Description/Activity
Id	Enter the code of the receipt format. This field let you enter up to 20 alphanumeric characters.
Description	Enter the description of the receipt format. This field allows you to describe within 100 alphanumeric characters.
Type	Select the receipt type of the format being added.
Follow up Receipt	Select the receipt format to be attached as follow up receipt. You can print the **Follow up Receipt** after the main receipt is printed.
Document Data	Use the document data field to enter the format XML directly.
[Design]	Design button opens a new screen to design the receipt format.
[Ok]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Receipt Designer Screen

Field	Description/Activity
Header Tab	Header tab displays a tree view of all the available items, which can be used to design the receipt format's header section. Drag and drop items on designer panel as required. You can enable the **Header** tab by selecting it from the Designer Panel at right side. By default, the **Header** tab remains disabled.
Detail Tab	Details tab displays a tree view of all the available items, which can be used to design the receipt format's details sections. Drag and drop the items on designer panel as required. Detail tab will be enabled when any of the details tab is selected from the Design Panel at right side. By default, the **Details** tab remains disabled.
Footer Tab	Footer tab displays a tree view of all the available items, which can be used to design footer sections of receipt format. Drag and drop the items on designer panel as required. Footer tab will be enabled when any of the details tab is selected from the Designer Panel at right side. By default, the **Footer** tab remains disabled.
Variables Tab	Click variable tab to create new variables. Once variable is created, it will be available in **Header**, **Footer** or **Details** tab to drag and drop on the Design Panel. It contains following fields: • **Variable Name:** Enter the name of the variable being added. • **[Add]:** Click the **Add** button to add a variable. Once variable is added, it will be available in different sections like Header, Details or Footer. • **[Cancel]:** Cancel button cancels the addition of variable. • **Existing Variable:** This section displays list of available variables.

Preview	Click the **Preview** tab to preview the receipt, which is being designed.
Design Panel	Tabbed control adjacent to the above tabs is **Design Panel**. User can drag and drop properties from properties tree, add formulae, add conditions or add variables. This panel will have multiple tabs depending upon the type of the selected receipt. Various receipts can have one or multiple tabs from the following list: • **Header:** This is default tab. Use this tab to design header format. • **Sale Items:** Sale items related information can be added to this section to design sale items section in the receipt. • **Exchange Items:** Use the **Exchange Items** section to add exchange items related information in required format. • **Delivery Items:** Use this section to design delivery item section in the receipt. • **Order Items:** Use this section to design order items section in the receipt. • **Layaway Items:** Use this section to design layaway items section in the receipt. • **Refund Items:** Use this section to design how the refunded items will be printed in the receipt. • **AR Payments:** Use this section to design how the AR Payments information will be printed in the receipt. • **Gift Certificate:** Use this section to design print format of gift certificate information. • **Footer:** Use this section to design print format of footer section of a receipt. • **Quotation Items:** Use this section to design print format of quotation items information. • **Coupon:** Use this section to design print format of coupon information.
Common Properties	Common Properties section is used to set common properties for all items. Following properties can be set using common properties section: • **Bold:** Select any item and select this option to print in bold face. • **Barcode:** Select this option to set bar code symbology for any item. • **Symbology:** Dropdown displays available barcode symbologies. Selected symbology will be applied for the selected item. This field will be visible if selected row has group control. • **Allow Double Height:** Set the row span of the selected row to 2. • **Separator:** Displays the list of characters, which can be used to print separator row. • **Prefix:** Value entered in prefix field will be prefixed to the value of the selected row • **Postfix:** Value entered in the **Postfix** field will be post fixed to the value of selected row. • **Align:** Select the alignment mode for selected item to align it horizontally. • **Span:** Value in this field set the column span for selected column

	• **Format:** Enter the desired format for fields of type date or decimal. • **Format String:** Enter the desired display format for all the items those are part of group control. This field will be visible if selected row has group control.
Formulae Settings	This section displays the following settings related to formulae : • **Object:** Enter the formulae that needs to be evaluated before printing. Drag and drop any item from tree view or type the item. • **Operator:** Displays the list of operators, which can be used in creating formulae. This field will be visible if selected item is a formula.
Condition Input	Condition Input section contains the settings related to `condition (IF, ELSEIF)` if dropped on the design. Available condition settings are: • **Object:** Drag and drop any item from tree view or type the value by hand. Value of this field will be compared to the value field. • **Operator:** select the operator which will be applied to the object • **Value:** Drag and drop any item from tree view or type the value by hand. • **[Update]:** Click the **Update** button to update the condition This field will be visible if selected item is a condition.
Variable Settings	Variable Settings section displays the settings related to a variable. It has following settings for variables: • **Object:** This field is used to set the value of a variable. Value in this field can be an object or an expression. Values of expression will be evaluated and assigned to the variable while printing. • **Operator:** Select any operator to formulate any expression. • **Print Variable:** Check this field if value of variable needs to be printed. This field will be visible if selected item is a variable.
[Import]	Click this button to import any XML receipt from the older format to the WYSIWYG receipt editor.
[Export]	Click this button to export the design to a XML format.
[Add New Section]	Click this button to add new section/tab in the Design Panel. A pop-up window opens to capture following information related to the new tab: • **Section Name:** Enter the desired string, which will be displayed, on the tab. • **Section Type:** Select the type of section/tab. Clicking the **Ok** button adds a new section/tab.
[Ok]	The button converts design to XML, closes the screen, and returns to the **Data Setup** screen.

[Cancel]	The button does not save any changes and closes the screen.

Document Print Profile

This feature facilitate the user to define a setting for printing the various documents that are generated when the business transactions are done from iVend Management console.

To open the screen, browse through *Administration > Retail Configuration > Document Print Profile*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the profile to be searched.
Description	Enter the description of the profile to be searched.
Search Results	
Id	Displays the code of the profile(s) searched.
Description	Displays the description of the profile(s) searched.

DATA SETUP SCREEN

Field	Description/Activity
Id	Enter the code of the print profile receipt. This field let you enter up to 20 alphanumeric characters.
Description	Enter the description of the print profile. This field allows you to describe within 100 alphanumeric characters.
Apply For	The valid values for this options are • **User** : Selecting this option would allow user to select the system users for which the profile is to be applied • **Role**: Selecting this option would allow user to select the security roles for which the profile is to be applied.
Apply for All Users/Roles	Select this option in case you would not like to select the users/roles and would like to apply this on all the users/roles.
Document Type	Lists the various documents for which the profile can be set.
Report to Print	Select the report which is to be printed for the defined document type. In case user would like to use the default report of the system then this can be left blank.
Preview	Select this option in case the user is allowed to preview the report before printing.
Default Printer	Select the default printer on which the report is to be printed when user prints the report.
Copies	Specify the number of copies that are to be printed when the report is printed.
[Add Security User/ Role]	Based on the “Apply For” and “Apply for All” settings, users/roles can be selected from this print profile.
[Remove Security User/ Role]	Based on the “Apply For” and “Apply for All” settings, users/roles can be removed from this print profile.
[Ok]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Location

Location are setup even for warehouses in which location is enabled. Each warehouse can have multiple locations for different-2 operations. If location is enabled on warehouse then it must have a default location

To open the screen, choose *Administration > Retail Configuration > Location*.

This menu will be available once location is enabled on enterprise.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the location to be searched.
Description	Enter the description of the location(s) to be searched.
Active	Select one of the following scenarios: All - To search for all the locations setup in the system. True - To search for the locations with 'Active' option enabled. False - To search for the locations with 'Active' option not enabled
Search Results	
Code	Displays the code of the location(s) searched.
Description	Displays the description of the location(s) searched.
Warehouse	Displays the warehouse of location.
Is Default	Displays the default location of warehouse.
Active	Displays the status of location.

Data Setup Screen

Field	Description/Activity
Code	Enter the code of the location. A unique code of a maximum of 50 alphanumeric characters can be entered.
Description	Enter the description of the location. A description of a maximum of 100 alphanumeric characters can be entered.
Warehouse	Select a warehouse from the list of location-enabled warehouses. Click ... to open the *Warehouse Search* screen and select the warehouse.
Active	Select this option mark the location as active. By default this option is enabled.
Default Location	Select this option mark the location as default location for warehouse. By default this option is not checked.
Sales	Select this option mark the location as sales location for warehouse.
Refund	Select this option mark the location as refund location for warehouse.
Fulfillment	Select this option mark the location as fulfillment location for warehouse.
Goods Receive	Select this option mark the location as goods receive location for warehouse.

Stock Transfer	Select this option mark the location as stock transfer location for warehouse.
Goods Isssue	Select this option mark the location as goods issue location for warehouse.
Goods Return	Select this option mark the location as goods return location for warehouse.
Freeze	Select this option mark the location as freeze location for warehouse.
[Ok]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Employee

Use this feature to maintain a database of all the users in the company. For all the users who need to log into the POS register and/or the Management Console, a security user also needs to be created through the *Administration > Security User* option. The following illustrates the three steps needed to prepare a user with rights to use the POS register or the Management Console.

To open the screen, choose Administration > *Human Resources > Employee*.

Search Screen

Field	Description/Activity
	Search Criteria
Code	Enter the code of the user to be searched.
First Name	Enter the first name of the user(s) to be searched.
Middle Name	Enter the middle name of the user(s) to be searched.
Last Name	Enter the last name of the user(s) to be searched.
Job Title	Enter the job title of the user(s) to be searched.
Transaction Entry	Select one of the following options: • **All**: If all the users satisfying the search criteria need to be displayed. • **True**: If only user(s) who can do transactions at the POS need to be searched. • **False**: If user(s) who cannot do transactions at POS need to be searched.
Uses Time Clock	Select one of the following options: • **All**: If all the users satisfying the search criteria need to be displayed. • **True**: If only user(s) who can do use time clock at the POS need to be searched.

	• **False**: If user(s) who cannot use time clock at POS need to be searched.
Is Sales Person	Select this option if the user is to be marked as sales person in the system.
Is Active	Select this option is user is to be marked as active.
Search Results	
Code	Displays the code of the user(s) searched.
Job Title	Displays the job title of the user(s) searched.
First Name	Displays the first name of the user(s) searched.

SETUP SCREEN

Field	Description/Activity
Header Column	
Code	Enter the code of the user. A unique code of a maximum 20 alphanumeric characters can be entered.
First Name	Specify the first name of the user. A first name of a maximum 50 alphanumeric characters can be entered.
Middle Name	Specify the middle name of the user. A middle name of a maximum 50 alphanumeric characters can be entered.
Last Name	Specify the last name of the user. A last name of a maximum 40 alphanumeric characters can be entered.
Job Title	Mention the job title for the user. A title of a maximum 40 alphanumeric characters can be entered.
Applicable Subsidiary	Allows selecting more than one subsidiary. Once assigned to a Subsidiary cannot be remove. It is visible if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Address	Displays the address of the customer. Click [...] to open the *Address* screen and enter the address details.
Email	Enter the email id of the employee.
Mobile Phone	Enter the phone number of the employee. This phone number is used in sending the query responses back to the employee in case a report/query request is triggered from the employee using the SMS feature.
Department	Select a department to which the user belongs from the list of departments. Click [...] to open the *Department Search* screen and select the department. To add a new department, press F3 or click on [F3 New] button in the Department Search screen.
Team	Select a team to which the user belongs from the list of teams. Click [...] to open the *Team Search* screen and select the department. To add a new team, press F3 or click on [F3 New] button in the *Team Search* screen.
User Specific Store	Select a store to which the user belongs. Click [...] to open the *Store Search* screen and select the store.

	If subsidiary is enabled, stores in search screen are filtered as per subsidiary(s) selected in field Applicable subsidiary.
Position	Select a value from the list of employee positions available. Click [...] to open the *Employee Position Search* screen and select the position. To add a new position, press F3 or click on [F3 New] button in the *Employee Position Search* screen.
Retail Profile	Select a profile to which the employee is to be attached. Click [...] to open the *Retail Profile Search* screen and select the profile. To add a new profile, press F3 or click on [F3 New] button in the *Retail Profile Search* screen.
Transaction Entry	Select the option if you want to allow the employee to carry out transactions at POS.
Active	Select the option if the user is active.
Team Banking	Select the option if you want the employee to use the till assigned to his team for team banking.
Uses Time Clock	Select the option if you want the employee to clock in and clock out at the POS.
Manager	Select the option if you want the employee to be identified as a manager. The users with the option enabled can login to any POS to do a manager override.
Is Sales Person	Select the option if you want the employee to be identified as a sales person. The users with the option enabled can be selected as a sales person in the transactions at POS.
Preferred Language	From the available list, select the preferred language of the user. Once selected the User Interface of iVend would be displayed to the user in the preferred language set for the user. Currently the following language is supported by iVend. • English (United States) • Arabic • Dutch • French • German • Greek • Italian • Latin American Spanish • Polish • Simplified Chinese • Traditional Chinese • Vietnamese • Portuguese
Allow EoD from POS	Select this checkbox to enable an employee to perform End of Day activity from POS. End of Day from POS can only be done in case there is only one POS Terminal configured for the entire store.
Allow POS Unlock	Select this option in case you would like the user to unlock the POS that is locked by another user. In the case setting is turned ON, then user would be able to unlock the POS.

Detail Column	
Code	Displays the code of the Job Code added.
Description	Displays the description of the Job Code added.
[Add Job Code]	Use this button to map a job code to the user. Click the button to open the Job Code Search screen and select the product. . To add a new job code, press "F3" or click on [F3 New] button in the Job Code Search screen.
[Delete Job Code]	Use this button to delete the selected job code.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Employee Position

The field specifies the designation of the employees. The employee position is specified while setting up the users. This feature is a reference table mainly for reporting purposes. Some examples for employee positions can be sales executive, cashier, assistant store manager, store manager etc.

To open the screen, choose *Administration > Human Resources > Employee Position*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the employee position to be searched.
Description	Enter the description of the employee position(s) to be searched.
Search Results	
Code	Displays the code of the employee position(s) searched.
Description	Displays the description of the employee position(s) searched.

Setup Screen

Field	Description/Activity
Code	Enter the code of the employee position. A unique code maximum of 20 alphanumeric characters can be entered in the code.
Description	Enter the description of the employee position. A maximum of 100 alphanumeric characters can be entered in the description.
[OK]	This button updates changes to the database and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.

Team

The feature enables the user to setup a team. A team comprises of many users. Team is primarily for assigning a till to a team where all the users of a team can access the till assigned to their team. A user can be a part of only one team.

To open the screen, choose *Administration > Human Resources > Team*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the team to be searched.
Description	Enter the description of the team to be searched.
Search Results	
Code	Displays the code of the team searched.
Description	Displays the description of the team searched.

Setup Screen

Field	Description/Activity
Code	Enter the code of the team. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the team. A description of maximum 100 alphanumeric characters can be entered.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Job Code

The feature enables to set up job codes. Job Codes are the roles defined to the users. Each user needs to be mapped to one or more job codes. *E.g.,* a sales executive can work as a cashier also. Job codes are used for reporting purposes.

To open the screen, choose *Administration > Human Resources > Job Code*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the job code to be searched.
Description	Enter the description of the job code(s) to be searched.
Active	Select one of the following options: • **All** - The user wants to search all the existing job codes. • **True** - The user wants to search active job codes, which are available for mapping with the user. • **False** - The user wants to search that are not currently active.
Search Results	
Code	Displays the code of the job code(s) searched.
Description	Displays the description of the job code(s) searched.

Setup Screen

Field	Description/Activity
Code	Enter the code of the job code. A unique code of maximum 20 alphanumeric characters can be entered.

Description	Enter the description of the job code. A description of maximum 100 alphanumeric characters can be entered.
Active	Select the option to make the job code available for mapping it with the user. By default this option is enabled.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Security Role

Use this feature to set up security roles and assign various rights of access to various features to the role. e.g., setup roles like manager, cashier, sales person, etc., and decide the options that would be available to each role. A sales person may not have the option to close a till, for example, while a cashier may be allowed to do so.

To open the screen, choose *Administration > Authorization > Security Role*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the security role to be searched.
Description	Enter the description of the security role(s) to be searched.
Search Results	
Code	Displays the code of the security role(s) searched.
Description	Displays the description of the security role(s) searched.

Setup Screen

Field	Description/Activity
Code	Enter the code of the security role. A unique code of a maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the security role. A description of a maximum 100 alphanumeric characters can be entered.
Display Profile	Click [...] to select display profile for the security role.
[Assign Security Rights]	The button enables the user to assign security rights to the role being setup. Click on the button to display the "Security Rights" search screen and select the security right.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Security User

The feature allows the administrator/user to search for existing security users in order to make modifications and set up new users. All iVend users have to be set up as a security user to provide him/her the rights to access various features in Management Console and/or POS.

To make modifications or create a new user, the administrator/user logs into the Management Console using the administrator/user's own code and password as was setup in this screen. (There is a default user set up in the installation that can be used to begin setting up users.)

To open the screen, choose *Administration > Authorization > Security User*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the security user to be searched.
Electronic Id	Enter the electronic id of the security user(s) to be searched.
Search Results	
Code	Displays the code of the security user(s) searched
Electronic Id	Displays the electronic code of the security user(s) searched.
Security Role	Displays the code of the security role assigned to the user
Must Use Magnetic Card	Indicator of whether the user would use the magnetic card or not.

Setup Screen

Field	Description/Activity
Login Id	Enter the login id of the security user. A unique code of a maximum 20 alphanumeric characters can be entered.
Password	Enter the password. A password of a maximum 20 alphanumeric characters can be entered.
Electronic Id	Enter the electronic code of the security user. A unique code of a maximum 40 alphanumeric characters can be entered. This code is used if the user uses magnetic card to log into the system instead of manually entering a user id and password.
Security Role	Select a role from the list of security roles. Click [...] to open the Security Role Search screen and select the role. To add a new role, press F3 or click [F3 New] in the Security Role Search screen.
User	Select a user from the list of users. Click [...] to open the Employee Search screen and select the employee. To add a new employee, press "F3" or click [F3 New] in the Employee Search screen.
Must Use Magnetic Card	Select the option to enable the security user to use the magnetic card instead of entering a user id and password while logging into the Management Console or the POS.
Active	Select this option to enable the security user to be active. By default, this option is enabled. Only active users can log into the Management Console and/or POS
Can Change Password	Select this option to enable the security user to change his/her password while logging in Management Console or Point Of Sales.
Locked	This will be checked if the user is locked by the system. Manager can login and mark the user as unlocked of else based on the security policy setup in the system, user will be un-locked automatically by the system after the specified time interval.

User Type	Select the type of the user from the valid values • **Production Users**: Can only connect to production database from iVend application. All the transaction done by such user will be recorded in the production database. • **Training User**: Can only connect to Training database from iVend application. All the transaction done by such user will be recorded in the Training database. • **Both**: If the user is configured in this mode then while login the user will be prompted to choose between the production and the training mode. Based on the user selection the data would be saved in the corresponding database.
Existing Training Database	This dropdown would list all the training databases configured in the system.
Training Database Name	Select the database from the Existing Training database field or for creating a new training database enter the name in this field.
Is Enterprise User	Select this option is the user is an Enterprise user and is allowed to login in iVend Management console on the iVend Enterprise server.
Is Management Console User	Select this option if the user can login in iVend Management Console.
Allow Dashboard Web Viewer	Select this option in case the user is allowed to view iVend Dashboards though web viewer.
API Authentication User	Select this option if the user can authenticate REST APIs. An Authentication user cannot be Enterprise, Management Console, Web Viewer or Cloud user. Also, there can be only one API authentication user within the application.
Is Cloud User	Select this option in case iVend is hosted on cloud and the user being created is a user of iVend could.
Cloud User Name	System will automatically assign the Cloud User Name in case the user is cloud user and the cloud is hosted with iVend.
Cloud User First Name	Enter the user's First Name.
Cloud User Last Name	Enter the user's Last Name.
[Enroll Finger Print]	This button would be visible if the system is attached to a finger print reader (Biometric reader). Click on this button to capture the user's fingerprints.
[Update Training Database]	Click this button, if you want to refresh the training database. On upgrading iVend, the training database does not automatically upgrade and therefore the manager must login in iVend management console and update training databases after an upgrade.
[Mapped Stores]	Select the store in which this user can login in iVend Management console and do the transactions.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Security role of the super user cannot be updated.

Enroll Fingerprint

The feature allows the administrator/user to enroll/delete Fingerprints from the system.

To open the screen, choose *Administration > Authorization > Security User > [Enroll Finger Print]*.

Enroll Fingerprint:

Use following steps to enroll your fingerprint:

1. Make sure that your fingers are clean and dry.
2. The "Finger Scanner" screen will appear as shown in **Figure 1**.

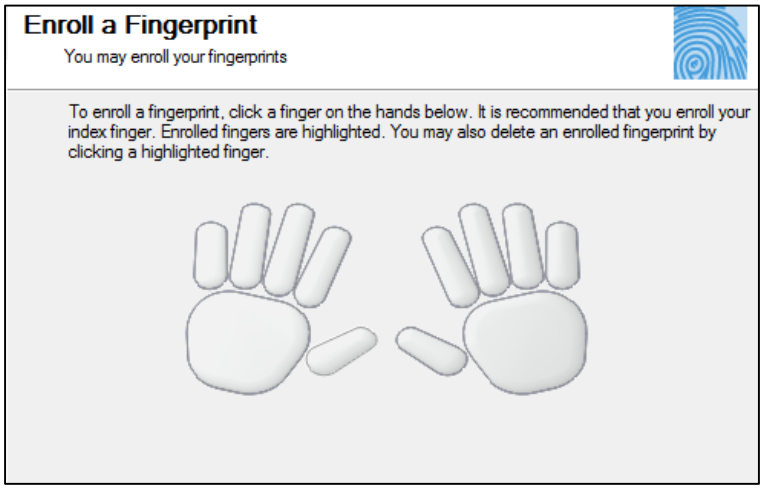


Figure 2

3. Select a finger on the screen, **Figure 2** will appear.

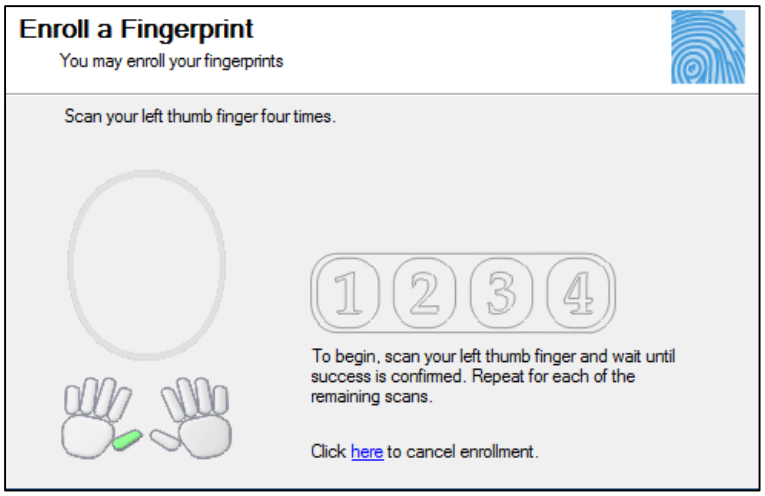


Figure 3

4. Press your finger against the sensor to enroll your fingerprint until the fingertip is recognized and accepted. You will need to swipe your fingertip 4 times to register the fingerprint with the system. After each successful scan, screen will appear as shown in **Figure 3**.

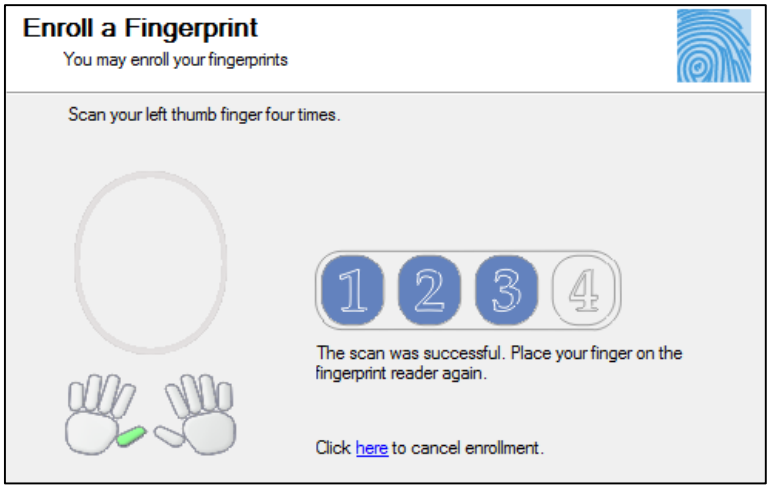


Figure 4

5. After successful enrollment, screen will appear as shown in **Figure 4**.

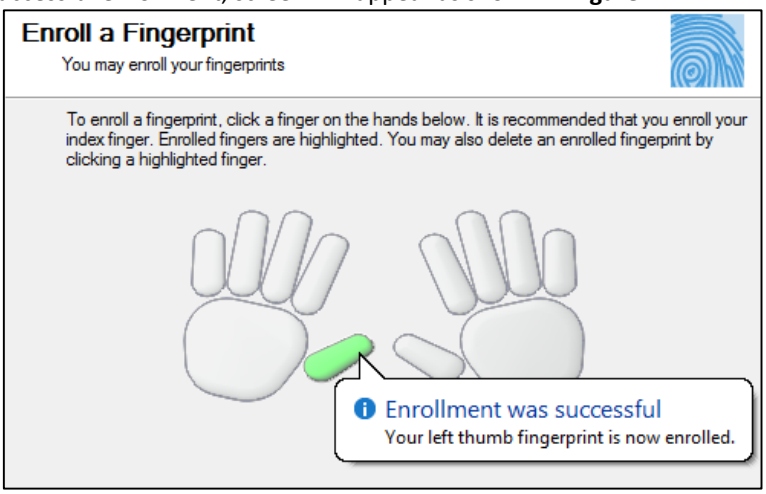


Figure 5

Delete Fingerprint:

Use following steps to enroll your fingerprint:

1. The "Finger Scanner" screen will appear as shown in **Figure 5**.

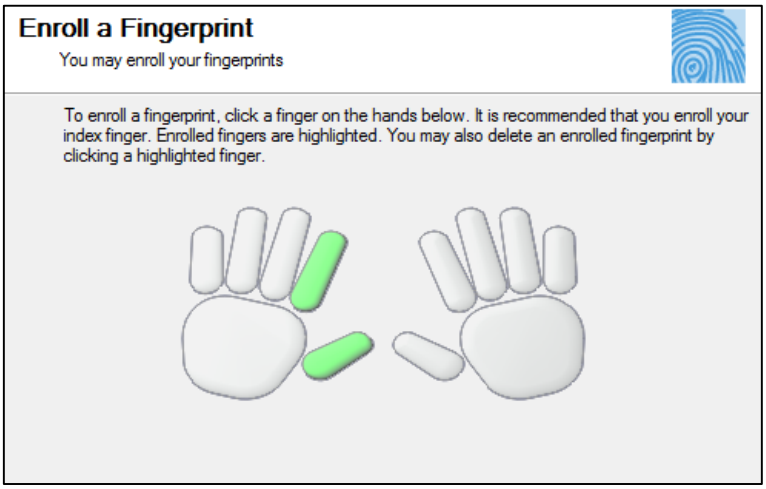


Figure 6

2. Click the finger for which fingerprint data needs to be deleted. A pop-up will appear as shown in **Figure 6.**

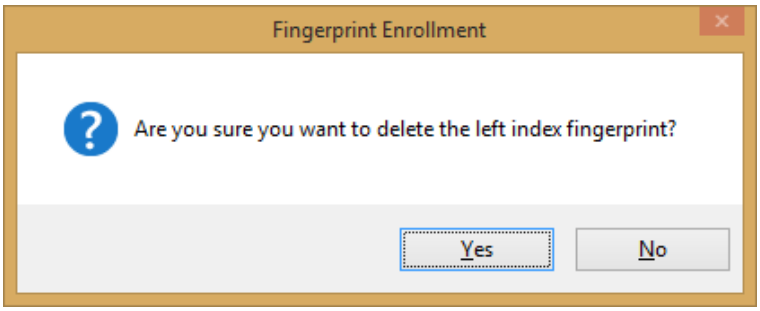


Figure 7

3. Click **Yes.** Confirmation message will appear for fingerprint deletion as shown in **Figure 7.**

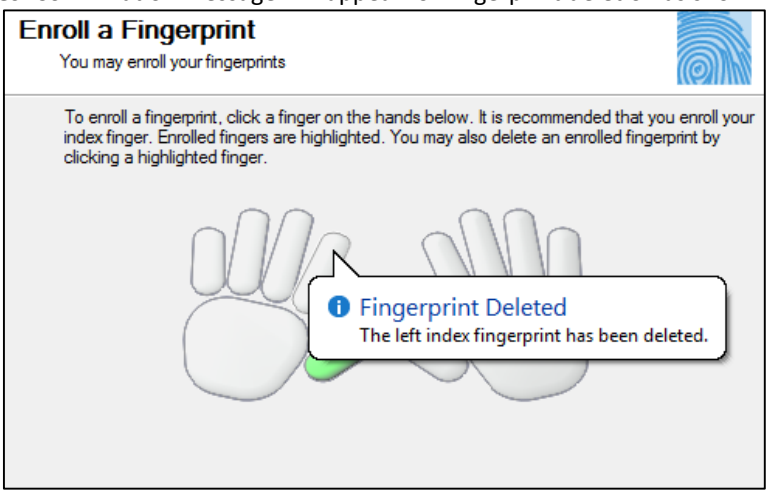


Figure 8

Authorization Stage

Use this feature to specify the sequence of the search criteria fields on all the search screens in the system.

To open the screen, choose *Administration > Authorization > Authorization Stage*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the Stage Id.
Description	Enter the Stage description.
Search Results	
Stage Id	Displays the Stage Id defined in the system.
Stage Description	Displays the Stage description defined for the Stages in the system.

Setup Screen

Field	Description/Activity
General	
Code	Enter the Id for the Stage.

Description	Enter the description for the defined stage.
No. of Approval Required	Enter the value that will be used as levels for the authorization required in the current stage.
Stage Approver(s)	
Approver Id	Displays the Approver's Id.
Approver Role	Displays the Approver's Role.
Buttons	
[Add Approver]	This button allows the user to add approvers for the current stage.
[Delete Approver]	This button allows the user to delete approvers from the stage.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Authorization Template

Use this feature to specify the sequence of the search criteria fields on all the search screens in the system.

To open the screen, choose *Administration > Authorization > Authorization Template*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the stage template code for the search.
Description	Enter the description for the stage template.
Search Results	
Template Id	Displays the Authorization template Id defined in the system.
Template Description	Displays the Authorization template description defined in the system.

Setup Screen

Field	Description/Activity
Authorization Template Setup - General	
Template Id	Enter the Id for the Stage Template.
Template Description	Enter the description for the stage template.
Comments Required for Authorization	Check the checkbox if the comments are required while doing the authorization.
Originator(s)	
Id	Displays the Id of the Originator.
Role	Displays the role of the Originator.
Authorization Stages	

Stage Id	Displays Stage Id.
Stage Description	Displays Stage description.
Authorization Condition Setup	
Condition Type	List of conditions that needs authorization.
Condition Value	The condition can be set to true by selecting the checkbox.
Buttons	
[Add Originator]	This button allows user to add originator to the stage template.
[Delete Originator]	This button allows user to delete Originator from the stage template.
[Add Stage]	This button allows stage to be added to the stage template.
[Delete Stage]	This button allows stage to be deleted from the stage template.
[OK]	This button updates changes to the database and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.

Password Policy

This feature enables the user to set the password/security policy for the user's password.

To open the screen, choose *Administration > Authorization> Password Policy.*

Setup Screen

Field	Description/Activity
Invalid Login Attempts Allowed	Displays the list of various options in the system.
Maximum Password Age (Days)	Enter the number days after which the password would expire.
Account Lockout Duration (Minutes)	Specify the duration in minutes after which the locked account would be automatically unlocked by the system.
Minimum Password Length	This is hard coded to 7. The minimum password length would be 7 for login into iVend.
Password History	This value is hardcode to 4. The system will maintain the last 4 passwords set for the user.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Replication Monitor

Replication monitor give a view of records, which are yet to be synced with the store/enterprise. The screen is available on both store and enterprise. When viewed on enterprise it shows the records which are yet to be replicated to the store. User can select the store from the Destination selection box to see the records.

To open the screen, choose *Administration > IT Administration > Replication Monitor.*

Field	Description/Activity
Sequence Number	Shows the unique sequence number of the records pending for replication.
Replication Key	Shows the unique system generated replication key.
Source Type	Shows the origination table name for which the record is to be synced.
Type	Shows the operation type.
Source Key	Shows the internal record key.
Process Date	Shows the time stamp of record generation.
Status	Shows the status of the record. The status can be “In Process” or “Not Processed”.
[Refresh]	Click on this button would refresh the screen.
[Exit]	The button closes the screen.

Replication Monitor – Mobile

Replication Monitor - Mobile give a view of records, which are yet to be synced with the mobile POS. The screen is available on both store and enterprise. User can select the Mobile POS from the Destination selection box to see the records.

To open the screen, choose *Administration > IT Administration > Replication Monitor - Mobile.*

Field	Description/Activity
Sequence Number	Shows the unique sequence number of the records pending for replication.
Replication Key	Shows the unique system generated replication key.
Source Type	Shows the origination table name for which the record is to be synced.
Type	Shows the operation type.
Source Key	Shows the internal record key.
Process Date	Shows the time stamp of record generation.
Status	Shows the status of the record. The status can be “In Process” or “Not Processed”.
[Refresh]	Click on this button would refresh the screen.
[Exit]	The button closes the screen.

Integration Monitor

Integration Monitor give a view of records, which are yet to be synced with SAP Business One or with iVend e-Commerce. The screen is available only at iVend Enterprise.

To open the screen, choose *Administration > IT Administration > Integration Monitor*.

Field	Description/Activity
SAP Business One to iVend - This gives a view of records which are generated from SAP Business One and are yet to be synced with iVend	
Integration Key	Shows the unique number of the records pending for integration.
Source Type	Shows the origination table name for which the record is to be synced.
Source Key	Shows the internal record key.
Action	Shows the operation type.
Log Date Time	Shows the time stamp of record generation.
Status	Shows the status of the record.
Do not display failed message	If this flag is on then only the pending records will be shown and the records which are failing to integrate are not shown in the monitor.
iVend to SAP Business One- This gives a view of records which are generated from iVend and are yet to be synced with SAP Business One	
Integration Key	Shows the unique number of the records pending for integration.
Source Type	Shows the origination table name for which the record is to be synced.
Source Key	Shows the internal record key.
Action	Shows the operation type.
Log Date Time	Shows the time stamp of record generation.
Status	Shows the status of the record.
Do not display failed message	If this flag is on then only the pending records will be shown and the records which are failing to integrate are not shown in the monitor.
[Refresh]	Click on this button would refresh the screen.
[Exit]	The button closes the screen.

Integration Failure Monitor

Integration Failure Monitor gives a view of records, which are yet to be synced with SAP Business One or with iVend e-Commerce. The screen is available only at iVend Enterprise.

To open the screen, choose *Administration > IT Administration > Integration Monitor*.

Field	Description/Activity
SAP Business One to iVend - This gives a view of records which have failed to integrate with iVend and are generated from SAP Business One	
Selected	Select the record which has to be retried for integration.
Integration Key	Shows the unique number of the records pending for integration.
Source Type	Shows the origination table name for which the record is to be synced.

Source Key	Shows the internal record key.
Action	Shows the operation type.
Log Date Time	Shows the time stamp of record generation.
Table Name	Shows the name of table/object.
Error Message	Show the error message that came while integrating the record.
iVend to SAP Business One- This gives a view of records which have failed to integrate with SAP Business One and are generated from iVend	
Selected	Select the record which has to be retried for integration.
Integration Key	Shows the unique number of the records pending for integration.
Source Type	Shows the origination table name for which the record is to be synced.
Source Key	Shows the internal record key.
Action	Shows the operation type.
Log Date Time	Shows the time stamp of record generation.
Error Message	Show the error message that came while integrating the record.
[Retry]	Marks the selected records for integration.
[Retry All]	Marks all the failed records for integration.
[Download]	Download the failed records in an excel file.
[Refresh]	Click on this button would refresh the screen.
[Exit]	The button closes the screen.

Offline POS

The offline POS feature allows the terminal POS to function even if the connectivity between the terminal POS and the store server is interrupted. As a part of the setup, user will have the option to configure off line POS terminals. When a Terminal POS is configured to work in offline mode, then the transactions done at the POS will be first persisted in the local database at the POS and then synced with the Store Server.

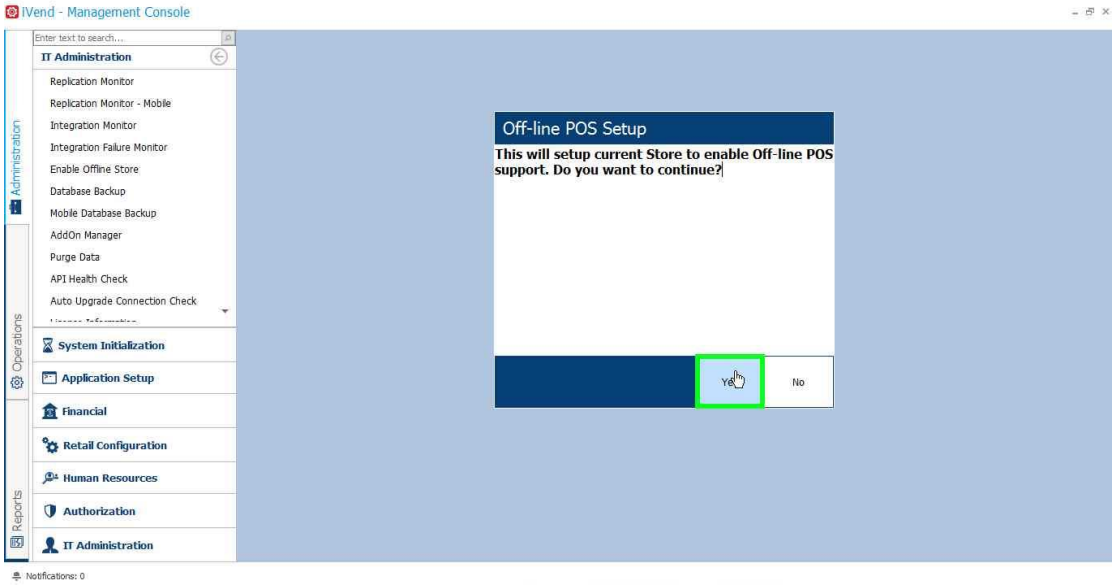
Enable Offline Store

In order to make a POS work in offline mode, corresponding store should be enabled to support offline POS.

To enable offline store click on enable offline POS option in the menu. A pop up will be displayed to confirm the user action.

Administration > IT Administration > Enable Offline Store.

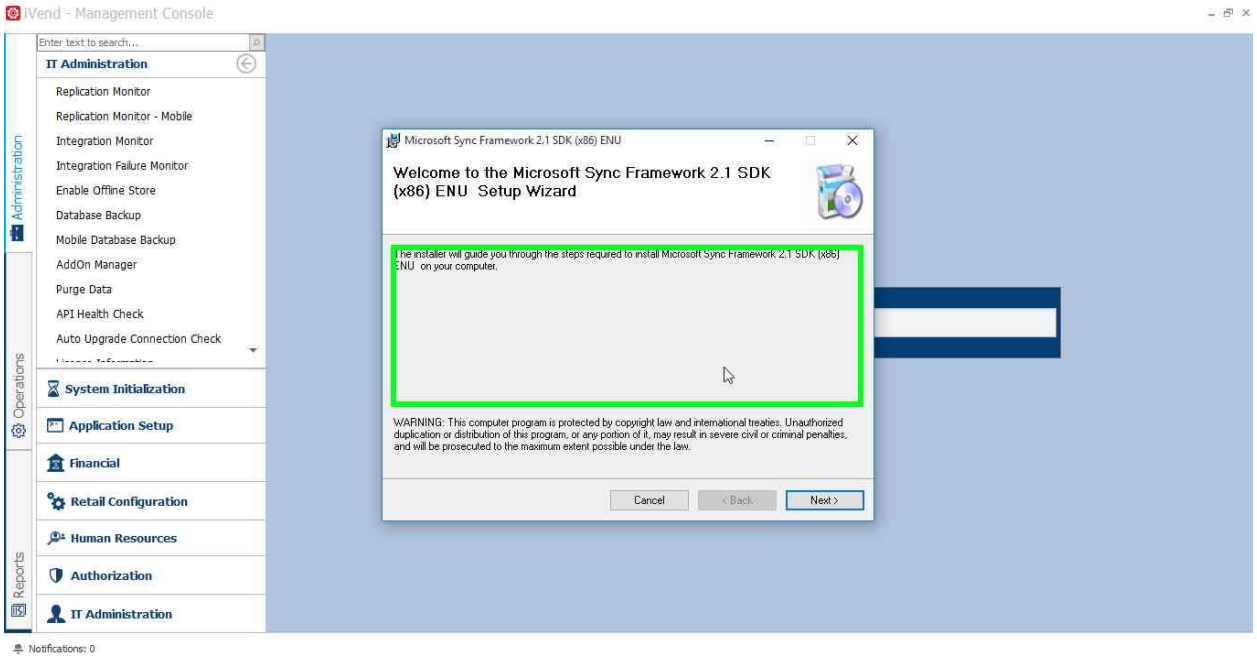
SCREEN



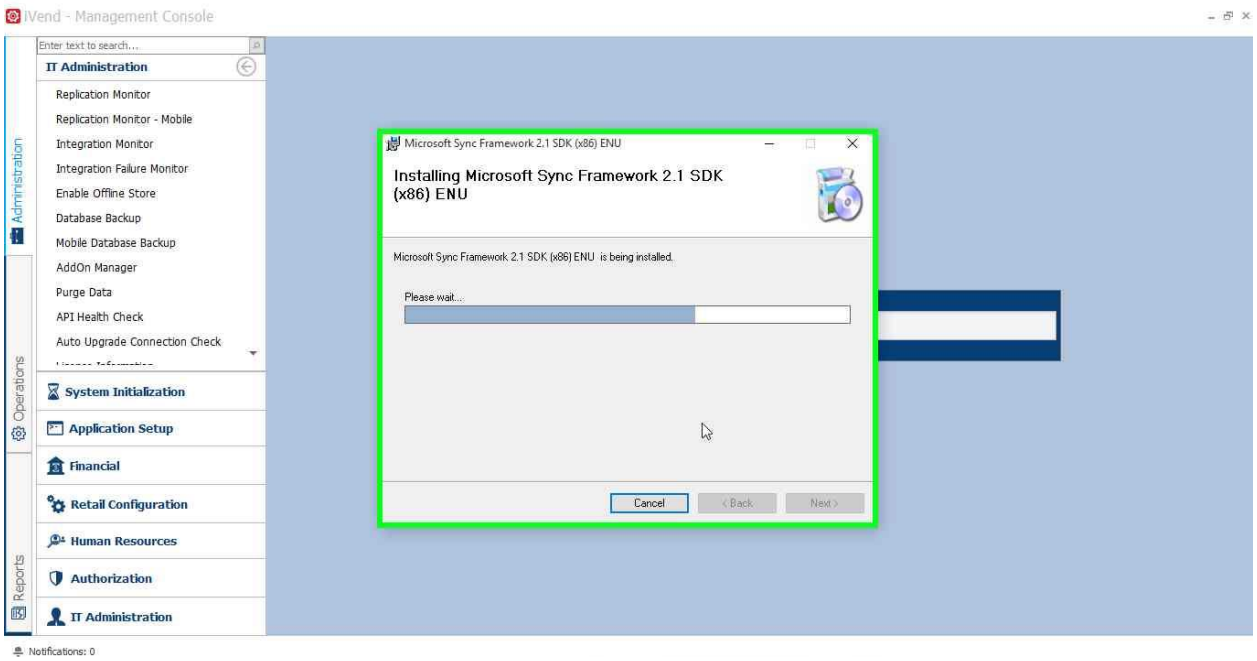
SETUP SCREEN

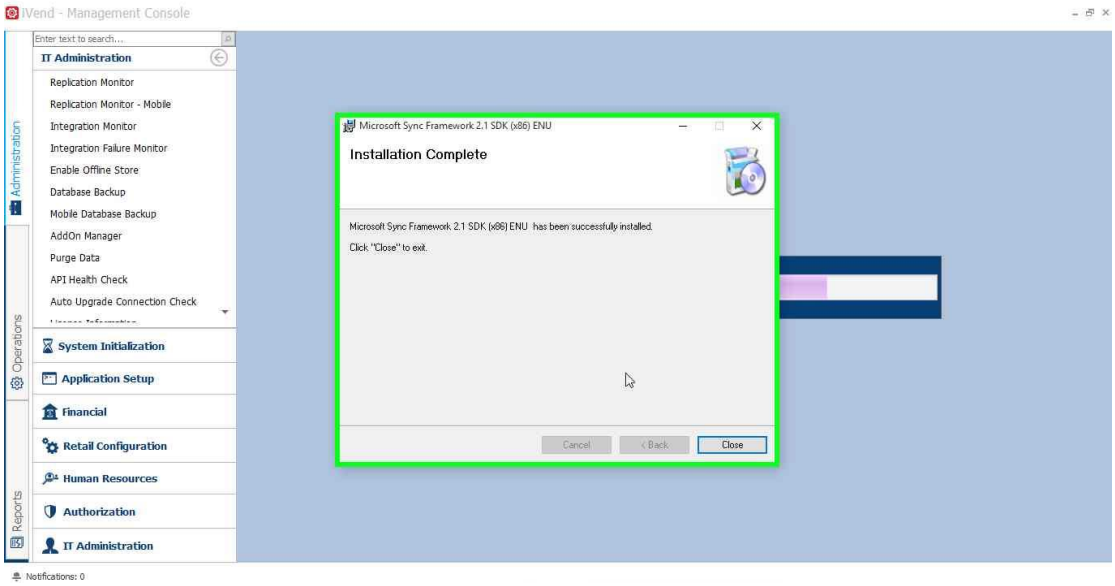
Field/Button	Description/Activity
[Yes]	Click Yes button to configure the current store to support offline POS terminals.
[No]	Clicking No button will cancel the use action and store's current state will remain unchanged.

Click Yes button to launch installer and it will guide through the steps required to install Microsoft Sync Framework 2.1 SDK (x86) ENU on computer.

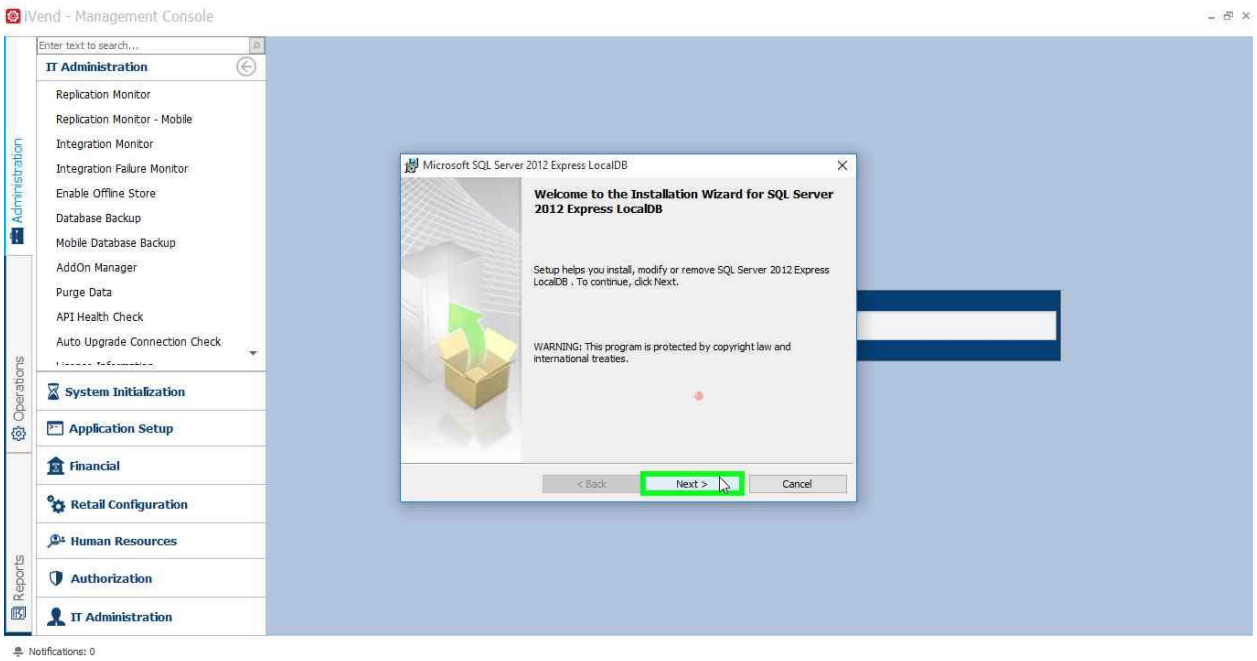


Click Next button and agree to the terms and conditions. System will start installing Microsoft Sync Framework 2.1 SDK (x86) ENU.

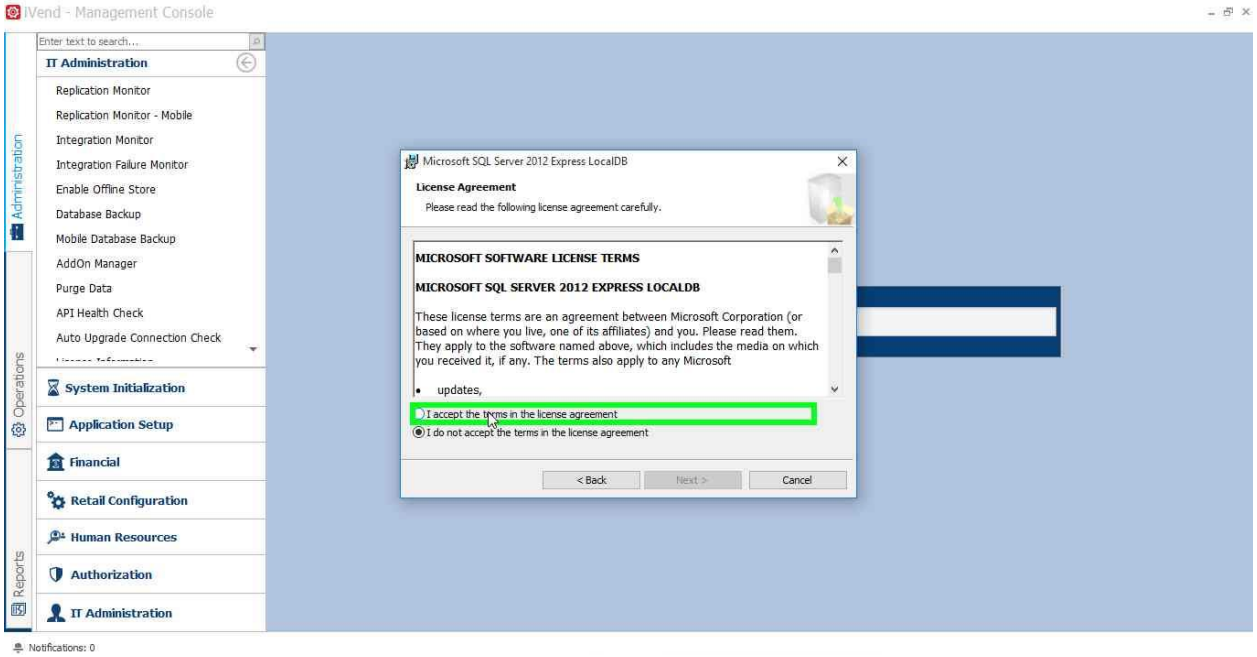




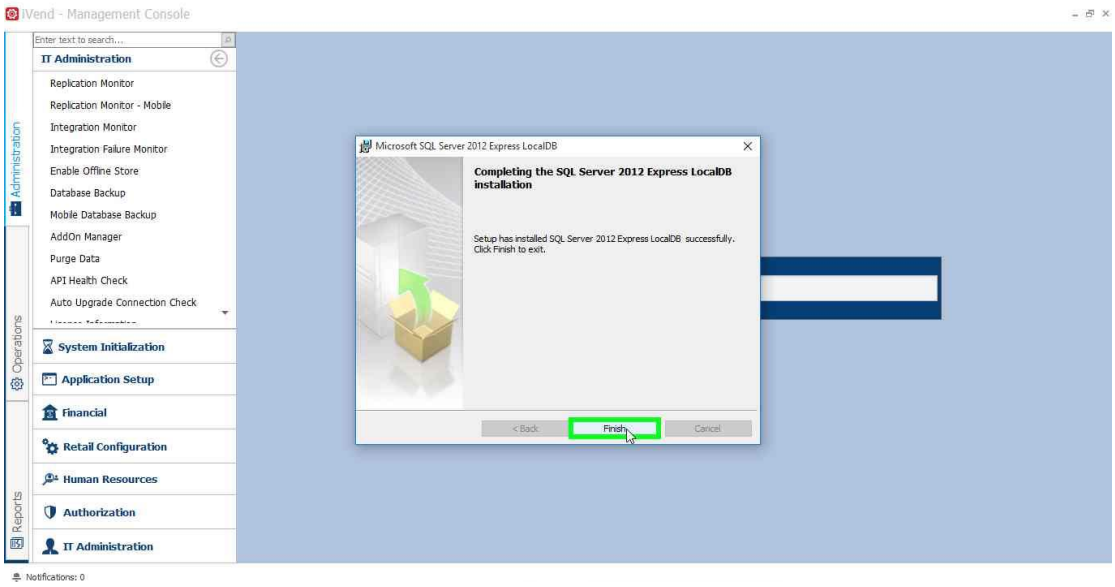
System will complete the installation for **Microsoft Sync Framework 2.1 SDK (x86) ENU** and click **Close**. After completing first installation, system starts installing SQL Server 2012 Express Local DB.



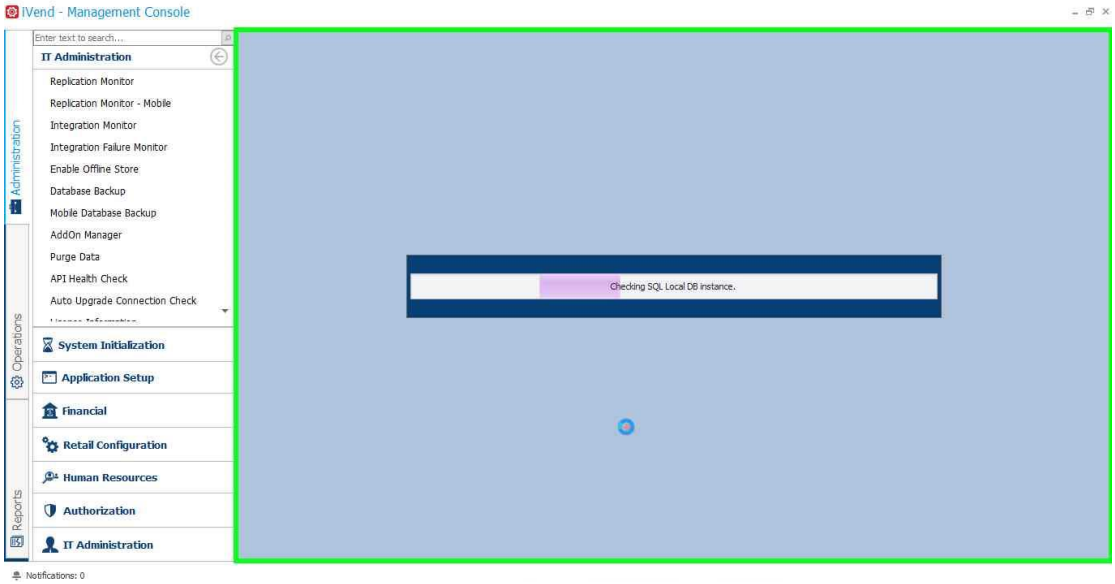
Click Next.



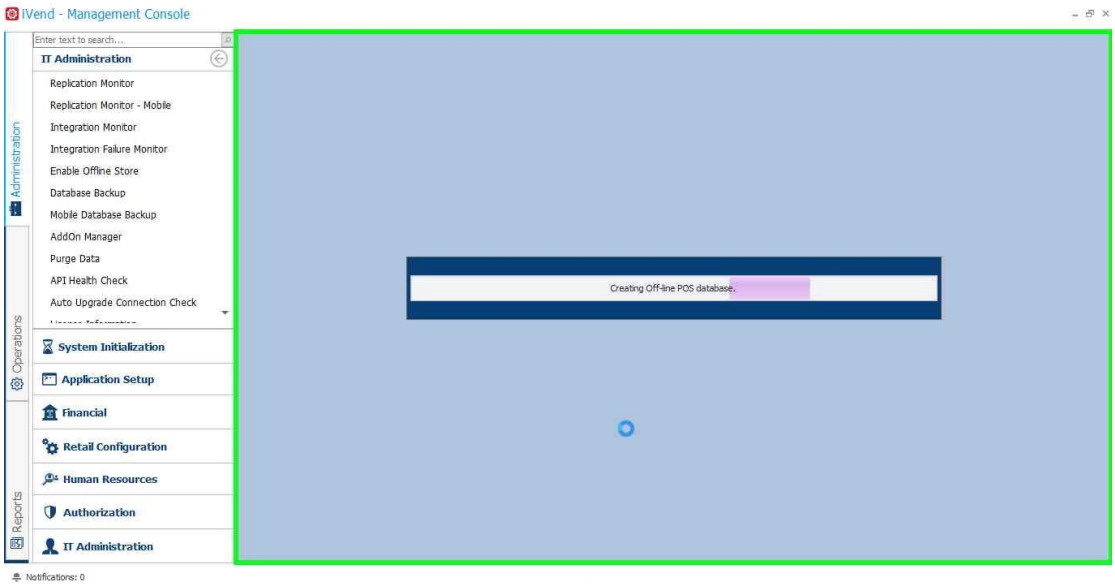
Agree to the terms and conditions and click **Next**. System starts installation.

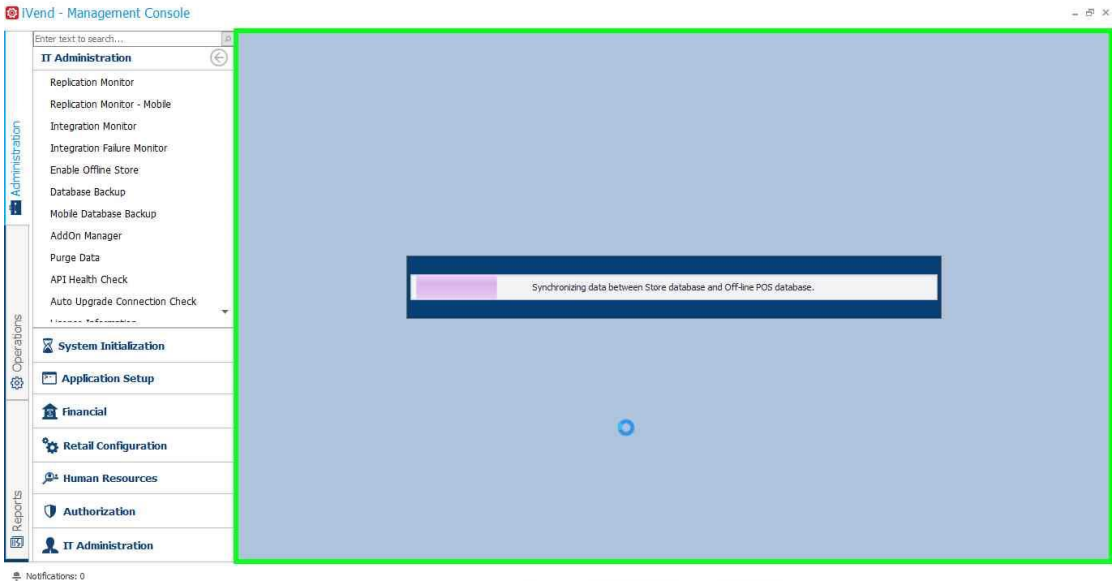


System will complete the installation for Microsoft SQL Server 2012 Express Local DB. Click finish.



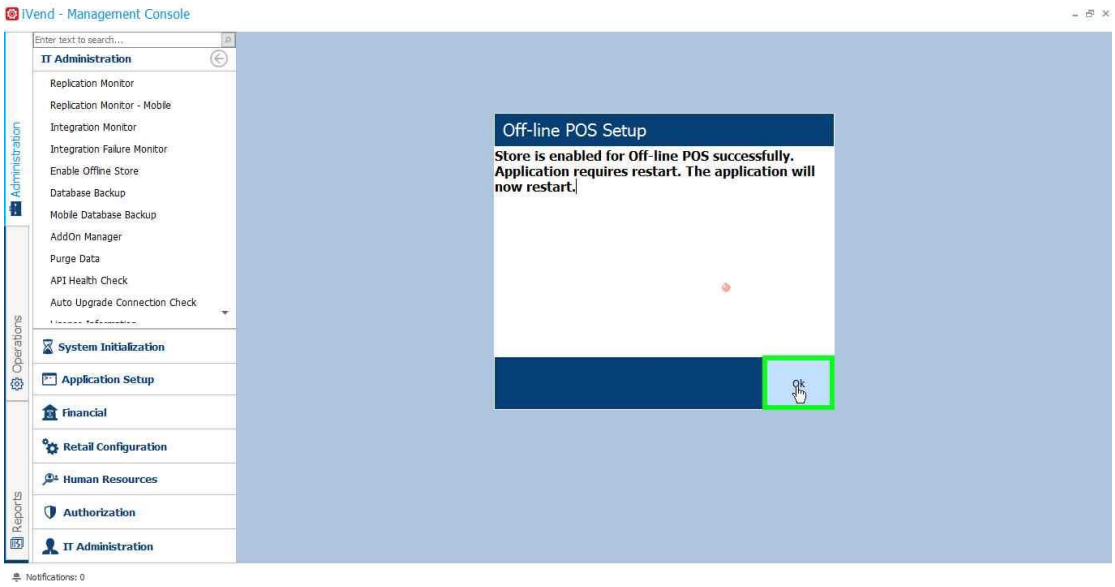
System will check SQL Local DB instance and create offline POS database.





System will synch data between store database and offline POS database.

Once data is synched between store and offline POS, system will ask to restart the application.

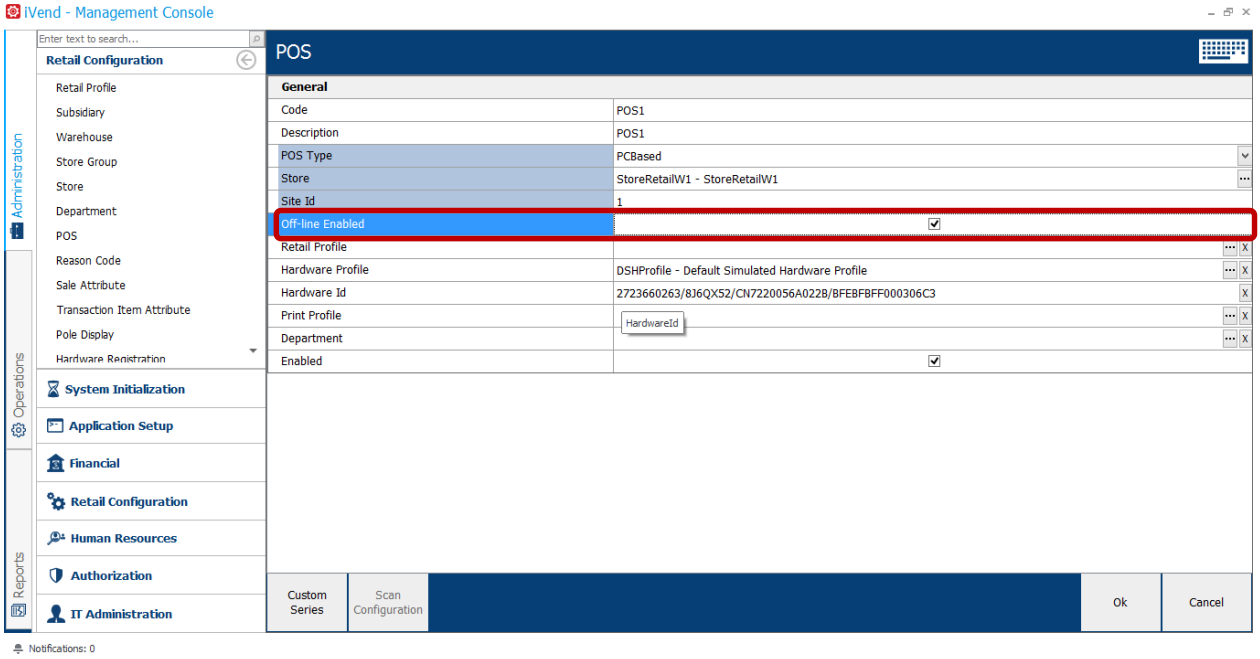


Enable Offline POS

One store in enabled to support offline POS, user needs to enable POS terminal to work in offline mode. POS screen has an option to mark a POS as offline.

To enable offline POS:

Administration > Retail Configuration > POS.



Field/Button	Description/Activity
Off-line Enabled	Check box indicates whether POS will work in offline mode or online mode.
Custom Series	Button will open custom series screen to provide custom series for Customer, which will be used in POS at the time of customer creation.
[OK]	The button updates the changes in the database.

[Cancel]	Cancel button will not update any changes in the database and the system state will remain unchanged.

Database Backup

The feature enables the administrator to take back up from the enterprise for a new store.

To open the screen, choose *Administrator > IT Administration > Mobile Database Backup*.

Field	Description/Activity
Transaction Cutoff Date	Enter the date after which the transactions will be restored at the selected store.
Store	Select the store from the available list for which the backup is to be taken.
Database Table Details	
Table Name	Shows the name of the data table for which the system is creating a backup.
Record Count	Shows the data table record count that will be exported from the system.
Size (KB)	Shows the data table size in KBs.
[Connect]	Clicking on this button will connect to database and then will ask for the path where the backup file will be saved. After selecting the backup file path the system will star taking the backup.
[Cancel]	This button closes the screen.

Mobile Database Backup

The feature enables the administrator to take back up from the enterprise for a new mobile that is being setup.

To open the screen, choose *Administration > IT Administration > Database Backup*.

Field	Description/Activity
Mobile POS	Select a Mobile POS for which the data backup is being taken.
[Connect]	Clicking on this button will connect to database and then will ask for the path where the backup file will be saved. After selecting the backup file path the system will star taking the backup.
[Cancel]	This button closes the screen.

AddOn Manager

The feature enables the administrator to register the new Add-On for iVend. Using Add-On iVend functionality can be extended.

The feature for managing iVend Add-On is available on the iVend Enterprise.

To open the screen, choose *Administrator > IT Administration > Addon Manager*

SETUP SCREEN

Field	Description/Activity
Add-On Name	Displays the Add-On name. The name is provided as while the Add-On is developed for iVend.
Add-On Version	Displays the Current Version of the registered Add-On in the system.
Description	Enter the Description of Add-On for easy identification.
Add-On File Path	Select the path of iVend Add-On files.
Connect/Disconnect Add-On	Shows whether the Add-on is connected or not.
Setting Type	Displays the Add-On Setting type. i.e. Store
Setting Name	Displays the Store name.
Connect/Disconnect Add-On	Shows whether the Add-on is connected or not on selected Store level.
[Add Add-On]	Click on this button to register additional Add-On in the system.
[Remove Add-On]	Click on this button to remove the already registered Add-On in the system.
[Up]	Click on this button to set the execution order of the registered Add-On in the list.
[Down]	Click on this button to lower the execution order of the registerd Add-On in the list.
[Add Store]	Click on this button to Add Store with which Add-On is to be associated.
[OK]	Click OK to Save the information.
[Cancel]	Click Cancel to Cancel the changes.

Purge Data

This feature enables the administrator to start the data purge activity at the stores. Using this system administrator can generate an event for doing a data purge at the store.

The feature is generally used in the scenarios where stores are using SQL Server Express Edition. Due to size limitations of a SQL Server Express Edition database, administrator would like to keep the store database size in check and therefore this activity is performed.

This menu option is available only on iVend Enterprise. Using this option would delete the transactional information from the store database.

To open the screen, choose *Administrator > IT Administration > Purge Data*.

SEARCH SCREEN

Field	Description/Activity
Search Criteria	
Schedule Date	Specify the date for which the purge schedule is to be searched.
Search Results	
Schedule Date	Specify the dates for which the purge activity is schedule.

SETUP SCREEN

Field	Description/Activity
Data Purge information	
Purge Transaction Before	Enter the date for which the data has to be purged. The earlier transaction data will be purged from the date defined.
Clear Inventory logs	Inventory log will also be purged when the checkbox is checked.
Clear Audit Log	Alog log data will also be purged when the checkbox is checked.
[Add Store]	Choose the individual store for which the Data purge has to be run.
[Add All Stores]	All the stores will be added to the purge schedule.
[Delete Store]	Added store to the schedule can be deleted.
[OK]	Click on OK button to Save the information.
[Cancel]	Click on Cancel button to Cancel the changes.
Store Information	
Store id	Displays the Store Id for which the purge has to run.
Run Date	Date on which the purge has to be run.

API Health Checkup

The feature enables the administrator to verify if the installed APIs are running correctly.

To open the screen, choose *Administration > IT Administration > API Health Check.*

API Health Checkup screen

Field	Description/Activity
Server IP Address	Enter the IP Address where the APIs are installed.
Check	Click on this button to start the API connectivity checks. The result will start display the screen.
Cancel	The button does not save any changes and closes the screen.

Auto Upgrade Connection check

The feature enables the administrator to verify if the application is able to connect to the upgrade server or not.

To open the screen, choose *Administration > IT Administration > Auto Upgrade Connection Check.*

Auto Upgrade Connection Check screen

Field	Description/Activity
[Test Connection]	This will start the connecting to the upgrade server. The results is displayed on the screen.
[Reset]	Clears the screen.
[Copy to Clipboard]	Copies the results displayed on the screen after test connection check is performed.
[Exit]	Closes the screen.

License Information

This screen displays the information about the license entitlements and remaining license entitlement count.

To open the screen, choose *Administration > IT Administration > License Information*.

License Entitlement Screen

Field	Description/Activity
Enterprise Name	Displays the Enterprise name.
Edition Type	Displays the Edition type on which the enterprise is running.
Upgrade Expiry	Displays the date on which the upgrade license will expire.
Entitled Features	Displays the components for which the license has been assigned.
Entitlement Count	Displays the license entitlement count assigned (purchased).
Entitlement Balance	Displays the unused license entitlement count.
[OK]	Closes the window.

End User License Agreement

This screen displays the End User license information.
To open the screen, choose *Administration > IT Administration > > End User License Agreement*

System Information

This screen displays the system information. The screen displays the version information along with the dll versions used in the application.

To open the screen, choose *Administration > IT Administration > System Information.*

Audit Log Master

Application allows enable/disable logging for master objects. To enable or disable logging user can check or uncheck the check box against a particular object in Audit Log Master Screen and save.

Note: This menu item is security right protected. If any user has only the read-only rights, he/she cannot see this menu item in Management Console.

To open this screen, choose *Administration > IT Administration > Audit Log Master.*

Setup Screen

Field	Description/Activity
Object Name	All objects are listed here, for which logs can be recorded.
Is Logging Enabled	Check this value if user wants to log the changes for particular object.
Buttons	
[Ok]	This button saves the changes and closes the screen.

[Cancel]	This button does not save any changes and closes the screen.

Audit Log

This feature allows tracking of the changes made in the application. All operations like Addition, Updating and Deletion is logged into the application. Users can also compare the version of the record to see the information that was updated. This feature is available across master data such as product, customer, price, item cost, etc.

Note: This menu item is security right protected. If any user has only the read-only rights, he/she cannot see this menu item in Management Console.

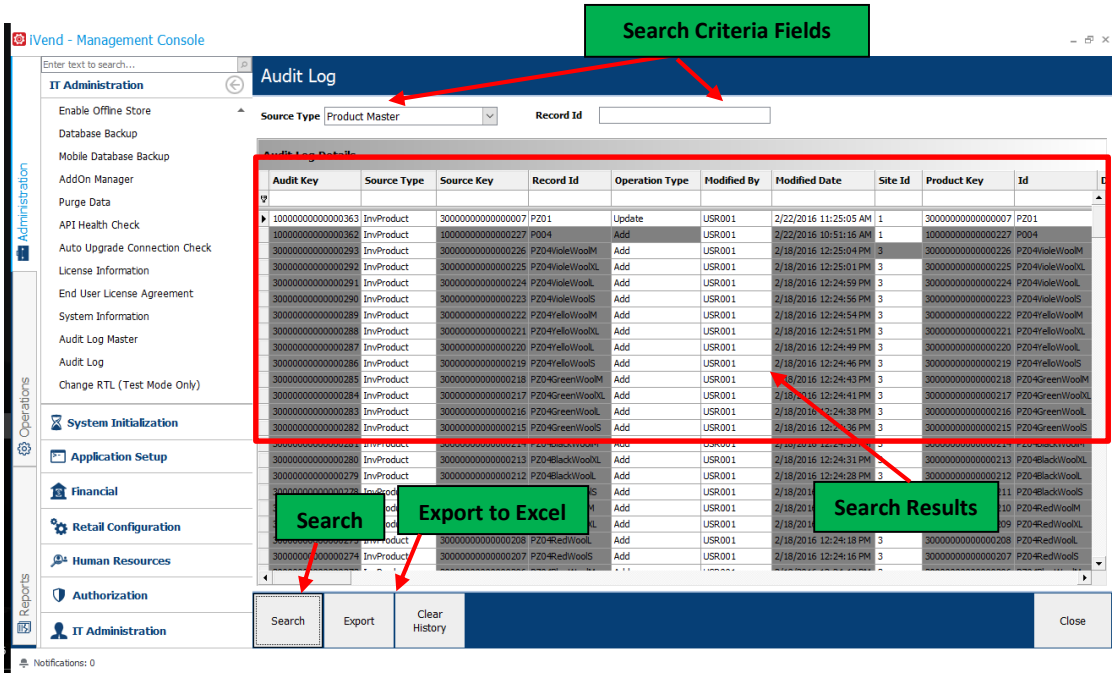
View Log Information

Application facilitates to view logged data for any object. Logged information can be viewed in two ways:

1. Use Audit Log menu item to view log information for any object.
2. Use context menu to view log information for a specific source object

View Log Information for Any object

Management Console > Administration > IT Administration > Audit Log.

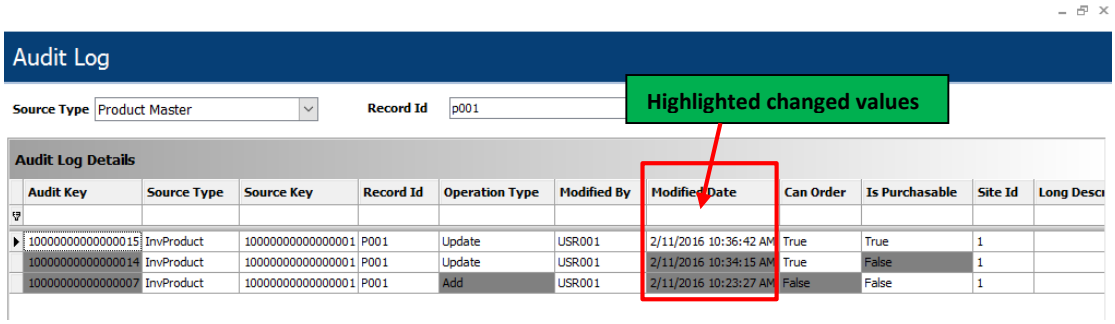


To Search with Search Criteria Fields

Field	Description/Activity
Search Criteria	
Source Type	Select from the existing values. Click [ˇ] to select any value or leave blank for all records.
Record Id	Enter manually the record id for which audit logs to be searched. Leave blank for all records.
Search Results	
Audit Key	Primary key of the audit log table.
Source Type	Table name of the source for this row.

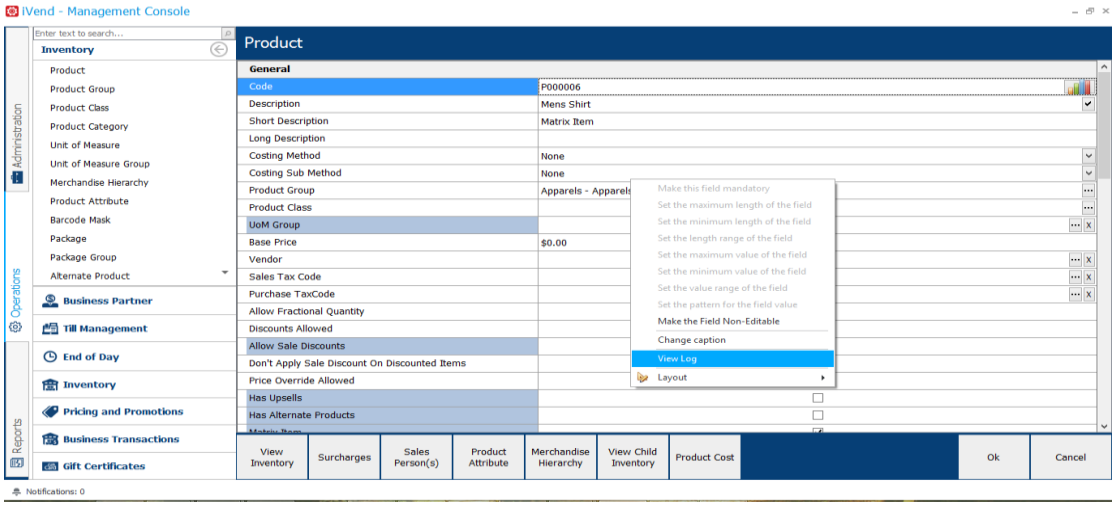
Source Key	Primary key of the source from the source table.
Record Id	Code of the searched result.
Operation Type	This fields show what type of operation has performed on the object. The valid values are- • Add • Update • Soft Delete • Hard Delete
Site Id	Site id of the system on which this update has occur.
Buttons	
[Search]	All the relevant logs filtered on basis of search criteria fields will be listed. All logs will be searched if no search criteria is mentioned.
[Export]	This button will export all the searched result into the excel file. User can save or edit the file as per the need.
[Clear History]	This will clear the whole history of the selected source. This action cannot be undone. If the logged in user has only the read-only rights, this button will be hidden.

Most updated change is listed on top of the list and the changed field is highlighted.



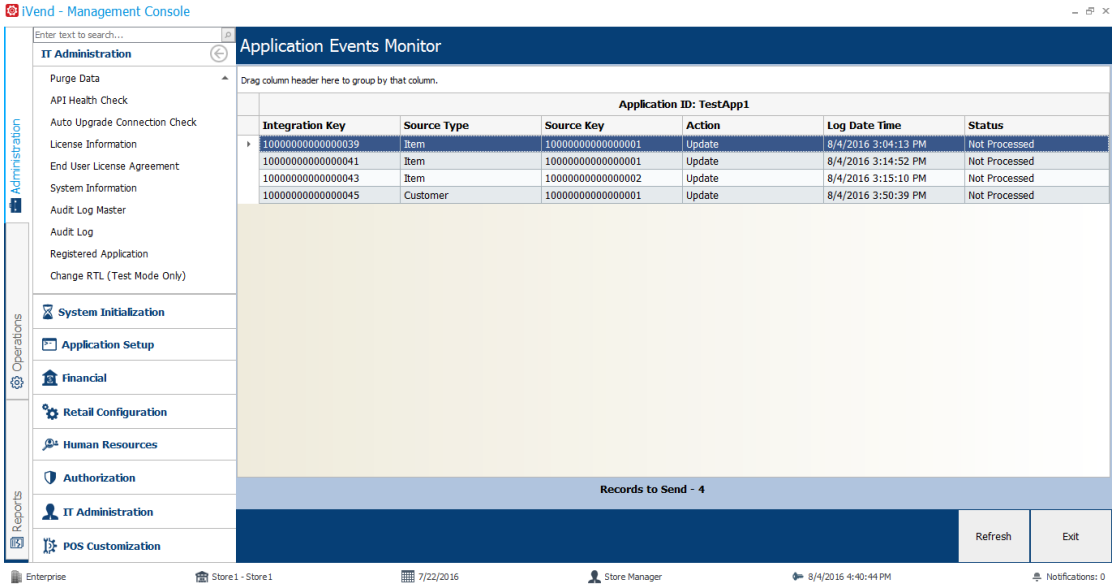
SPECIFIC SOURCE AUDIT LOG

Right click on any view and click on View Log. This context menu item is specifically based on security role. If the logged in user has the authority to see the audit log, only then this item will be visible to him/her.



Registered Application

This feature enables the third-party application to receive event notifications for the selected modules that are generated from iVend. User can also view events generated for the selected application by clicking the **Event Monitor** button. The event monitor screen shows information about Integration Key, Source Key, Object Type, Event Generated Date Time etc.



To Search with Search Criteria Field

Field	Description/Activity
Search Criteria	
Code	Select the code of the registered third-party application.
Description	Enter the description of the registered third-party application.
Search Results	
Code	Shows the registered application code.
Description	Shows description of the registered application.
Buttons	

[Search]	The relevant application is filtered which are registered based on the search criteria. All registered applications are searched if no search criteria is provided.
[Clear]	Clicking this button clears the search result allowing you to make a new search.
[New]	This button opens the Registered Application screen containing a form to register a third-party application and select module(s) for which you want to receive event notifications.
[Edit]	This button opens the Registered Application screen with the selected application in edit mode. Here you can edit description and select/deselect module(s).
[Delete]	Allows you to delete the selected ERP application.
[Copy]	Copies the properties of selected application for registering a new application.
[View]	Opens the selected application in view only mode.
[Event Monitor]	Opens the Application Events Monitor screen showing all queued events for the selected application.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

SETUP SCREEN

Field	Description/Activity
Code	Enter a code for ERP, which you want to register.
Description	Type a description for the ERP, which you want to register.
Selected	Allows you to select module(s) for which you want to get notifications.
Module Name	Displays available module names, which you can select to be notified.
Buttons	
[Select All]	Selects all modules.
[UnSelect All]	Clears the module selection..
[Ok]	This button updates the changes to the database and closes the screen.
[Cancel]	This button closes the screen without saving any changes.

POS Customization

There are following module in POS Customization:

- Layouts
- Design Panel
- Button Style

Layout

This feature allows users to search available layout from the Layout Search screen, or customize a layout, create a new layout and perform many other operations as explained below.

Field	Description/Activity
Search Criteria	
Description	Enter the name of layout, which you want to search.
Search Results	
Description	Displays layout description.
Is Default	Displays the checkboxes for the listed layouts. Only the default layout checkbox remains selected.
Buttons	
Search	Click this button to view the search result.
Clear	Clears the search result.
New	Opens the Layout screen for creating new layout.
Edit	Opens the selected layout in edit mode.
Delete	Deletes the selected layout. Before deleting, ensure that the layout, which you want to delete, is not in use.
Copy	Copies the layout structure and opens it in edit mode.
View	Opens the selected layout in view mode.
Export	Exports the selected layout as iVend POS Template in `.ivendtemplate` format.
Import	Allows to imports the selected layout as iVend POS Template in `.ivendtemplate` format.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Setup Screen

Field	Description/Activity
Id	Enter an id for the layout.
Description	Enter a description for the layout you are creating.
Is Default	Select this checkbox if you want to set it default.
Button Panel 1, Button Panel 2, Button Panel 3,	Click the ... button to open the Design Panel Search screen and select a button panel.

Button Panel 4, Button Panel 5	
Header Fore Color	Click to select a foreground color for the secondary screen.
Header Back Color	Click to select a background color for the secondary screen.
Footer Back Color	Click to select back color of the footer in the secondary screen.
POS Designer	Opens the layout structure in grid view allowing you to customize and restore the layout.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Design Panel

This feature allows you to create a matrix of buttons and associate operations to that buttons, along with that user can set the style, margin and globalization for a button in Design Panel. It provides functionality to set the order of the button in the Design Panel as well.

Below are the details on features and functionalities of Design Panel.

Field	Description/Activity
Search Criteria	
Description	Enter the name of design panel, which you want to search.
Search Results	
Description	Displays description of a design panel.
Columns	Displays number of columns that the panel has.
Rows	Displays number of rows that the panel has.
Buttons	
Search	Click this button to view the search result.
Clear	Clears the search result.
New	Opens the Button Header screen for creating a new design panel.
Edit	Opens the selected design panel in edit mode.
Delete	Deletes the selected design panel. Before deleting, ensure that the button header, which you want to delete, is not in use.
Copy	Copies the design panel structure and opens it in edit mode.
View	Opens the selected design panel in view mode.
Preview	Opens the preview screen of design panel.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

SETUP SCREEN

Field	Description/Activity
Id	Enter an id for the button header.
Description	Enter a description for the button header you are creating.
Column	Enter number of column(s). The default value is set to 1.
Row	Enter number of row(s). The default value is set to 1.
Margin	Enter the margin between buttons. The default value is set to 0.
Style	Click ··· to open the Button Style Search screen and select a style for the design panel.
Back Color	Click to select a back color of the design panel.
Apply Changes	Applies the changes based on the details provided in above fields.
Sequence No	Displays the sequence of a button in the design panel.
Caption	Double-click to open the Customize Button screen then enter the button caption and define its properties.
Operation	Double-click to open the Customize Button screen and choose an operation for the button. For the complete list of POS Operations please refer to section **POS Operation Events**.
Preview	Opens the panel in preview mode.
⏫	Click this button to order the selected button at the top.
▲	Click this button to order the selected button one level up. For example, clicking this button will bring the button from 3rd position to 2nd position.
▼	Click this button to order the selected button one level down. For example, clicking this button will bring the button from 2rd position to 3nd position.
⏬	Click this button to order the selected button at the bottom.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Button Style

This feature allows you to create and set font, color, and image for a button that can be used while creating or editing a design panel. Below are the details about features and functionalities of button style.

Field	Description/Activity
Search Criteria	
Description	Enter the name of button header, which you want to search.
Search Results	
Style Name	Displays name of button style.
Buttons	

Search	Click this button to view the search result.
Clear	Clears the search result.
New	Opens the Style screen for creating a new button style.
Edit	Opens the selected design panel in edit mode.
Delete	Deletes the selected button style. Before deleting, ensure that the style, which you want to delete, is not in use.
Copy	Copies the design panel structure and opens it in edit mode.
View	Opens the selected design panel in view mode.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Setup Screen

Field	Description/Activity
Code	Enter a code for the button style.
Description	Enter a description for the button style.
Font Name	Click to select a font name from the Font Name list.
Font Size	Enter a font size. You can also click the Up/Down button to increase/decrease the value in the Font Size field.
Font Bold	Select this checkbox to make the font bold.
Font Italic	Select this checkbox to make the font italic.
Font Underline	Select this checkbox to underline the font.
Fore Color	Click to select a foreground color for the font.
Back Color1	Click to set a background color.
Image	Click the ··· button to browse and select an image for the button and click the x button to remove the selected image. Clicking the x button asks for your confirmation before removing the image.
Location	Click the Location list to select a location where you want to place the image in the button.
Sample	Displays the button style sample according to the set properties.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Operations

The Operations module has the following sub modules:

- Business Partner
- Till Management
- End of Day
- Loyalty
- Inventory
- Pricing and Promotion
- Business Transactions
- Gift Certificates

Customer

This feature allows the user to search for the existing customers and setup new customers in the management console.

To open the screen, choose *Operations > Business Partner > Customer*.

Field	Description/Activity
	Search Criteria
Code	Enter the code of the customer to be searched.
Name	Enter the name of the customer(s) to be searched.
Customer Group	Enter the customer group of the customer(s) to be searched.
Accounting Id	Enter the accounting id of the customer to be searched.
Marketing	Select one of the following scenarios: • **All** - To search for all the customers setup in the system. • **True** - To search for the customers with 'Is Marketing' option enabled. • **False** - To search for the customers with 'Is Marketing' option not enabled.
Tax Number	Enter the tax number of the customer(s) to be searched.
Phone Number	Enter the phone no. of the customer to be searched.
Active	Select one of the following scenarios: • **All** - To search for all the customers setup in the system. • **True** - To search for the customers with 'Is Active' option enabled. • **False**- To search for the customers with 'Is Active' option not enabled.
Zip Code	Enter the zip code of the customer to be searched.
Address	Enter the address of the customer to be searched.
Electronic Id	Enter the electronic id of the customer to be searched.
Email Id	Enter the email id of the customer to be searched.
Loyalty Member	Select one of the following scenarios: • **All** - To search for all the customers setup in the system. • **True** - To search for the customers with 'Is Loyalty Member' option enabled.

	• **False** – To search for the customers with 'Is Loyalty Member' option not enabled.
Enable Loyalty Notification	Select this check-box to subscribe the customer for email/SMS notification on the registered email address or mobile number for loyalty events.
Enable Pass Notification	Select this option in case the customer would like to subscribe for a digital pass notifications generated from the iVend loyalty system. The digital loyalty pass is delivered as a pass for the iOS and Android based systems. Any updates in the loyalty information of the customer is sent to customers digitally which updates these passes.
Loyalty Program	Select a loyalty program from the list of existing loyalty programs in which you want to add the customer. You cannot edit the loyalty program for the specific customer after this one time selection process.
Referee Loyalty Id	Select the customer's name as a referee loyalty customer from the Loyalty Customer Search screen.
Search Results	
Code	Displays the code of the customer searched.
First Name	Displays the first name of the customer(s) searched.

SETUP SCREEN

Field	Description/Activity
Code	Enter a code for the customer. A unique code of maximum 20 alphanumeric characters can be entered.
Dashboard Icon	Click the Dashboard icon to view the Customer Sales dashboard screen. This icon is available on the Customer Edit and Customer View screen.
Salutation	A maximum of 50 alphanumeric characters can be entered.
Title	A maximum of 50 alphanumeric characters can be entered.
First Name	Enter the first name of the customer. A maximum of 100 alphanumeric characters can be entered.
Middle Name	Enter the middle name of the customer. A maximum of 50 alphanumeric characters can be entered.
Last Name	Enter the last name of the customer. A maximum of 40 alphanumeric characters can be entered.
Nick Name	Specify the nickname of the customer. A maximum of 50 alphanumeric characters can be entered.
Applicable Subsidiary	Allows selecting more than one subsidiary. Once assigned to a Subsidiary cannot be remove. This field will be available if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Customer Group	Select a group from the list of customer groups. Click … to open the Customer Group Search screen and select the customer group.
Company Name	Specify the name of the company with which the customer is associated. A maximum of 50 alphanumeric characters can be entered.
Tax Exempt	Select this option if the customer is Tax Exempt.

	This field is not visible, if subsidiary is enabled. It displays in "Subsidiary Account Details" screen.
Customer Type	Select from the valid values: • Company • Private This is used for validating the Tax Number length for the Chile and Mexico localization.
Tax Number	Enter the tax number of individual or that of company. If subsidiary is enabled, this field is removed from here and displays in "Subsidiary Account Details" screen.
Can Order Items	Select this flag if you would allow taking the special orders from this customer.
Gender	Type the gender information in this field.
Date of Birth	Enter the date of birth in MM/DD/YYYY format or click the to select a date of birth information.
Anniversary Date	Enter an anniversary date in MM/DD/YYYY format or click the to select an it from calendar.
Mobile Phone, Phone Number, Alternate Phone Number, Fax, Email, Web Page	Specify communication details of the customer.
Primary Contact	Specify the name of the 'primary contact' for the customer. Click … to open the Contact screen and create a new contact.
Accounting Id	This is a system generated unique key for each customer, which helps in integration of the Customer Code in iVend with the Customer Code in SAP Business One.
Customer Group	Select a group from the list of customer groups. Click … to open the Customer Group Search screen and select the customer group.
Sales Tax Code	Select the customer level tax code from the list of tax codes. Click … to open the Tax Code Search screen and select the 'sales tax code'. If subsidiary is enabled, this field is removed from here and displays in "Subsidiary Account Details" screen.
Loyalty Member	Select this option mark the loyalty customer.
Enable Loyalty Notification	Select this checkbox to subscribe the customer for email/SMS notification on the registered email address or mobile number for loyalty events.
Loyalty Program	Select a loyalty program from the list of existing loyalty programs in which you want to add the customer. You cannot edit the loyalty program for the specific customer after this one time selection process.

Referee Loyalty Id	Select the customer's name as a referee loyalty customer from the Loyalty Customer Search screen.
Referee Loyalty Id	Click [...] to enter the referee member details.
Shipping Type	Assign a shipping type for the customer. Click … to open the Shipping Type Search screen and select the shipping type. To add a new shipping type, press "F3" or click on "F3 New" button in the Shipping Type Search screen.
Price List	Select a price list from the available list. Click … to open the Price List Search screen and select the 'price list'. This field is disabled if the ERP type is SAP Business One. If subsidiary is enabled, this field is removed from here and displays in "Subsidiary Account Details" screen.
Discount	Specify the discount for the customer. This is applied automatically as a sale level discount on invoice for the customer.
Active	Select this option mark the customer as active. Only active customers would be visible in customer search at POS. By default, this option is enabled. This field is not visible, if subsidiary is enabled. It displays in "Subsidiary Account Details" screen.
On Hold	Select this option if the user wants to put the customer on hold. No transaction can be done at the POS for the customer put on hold. This field is not visible, if subsidiary is enabled. It displays in "Subsidiary Account Details" screen.
Marketing	Select this option if the user wants to make the customer a part of the marketing activities like mailers on promotions and discounts.
Electronic Id	Enter the electronic code of the security user. A unique code of a maximum 40 alphanumeric characters can be entered. This code is used if the user uses magnetic card to find out customer details in system instead of manually entering a customer id and other details. This field is not visible, if subsidiary is enabled. It displays in "Subsidiary Account Details" screen.
Payment Type	Displays the payment types defined in the system. This field is not visible, if subsidiary is enabled. It displays in "Subsidiary Account Details" screen.
Is Tax Free	Select this option if the customer is Tax Free. This field is not visible, if subsidiary is enabled. It displays in "Subsidiary Account Details" screen.
Address	
Address	Displays the address of the customer. Click … to open the Address screen and enter the address details.
Billing Address	Displays the billing address of the customer. Click the Billing Address button to setup the address.

Shipping Address	Displays the shipping address of the customer. Click the Shipping Address button to setup the address.
Loyalty Points Information [Loyalty Points Information fields are not available while creating a new loyalty customer. When an existing loyalty customer is searched and opened in edit mode, these fields are displayed.**]**	
Membership Group	Shows the name of membership group to which the customer belongs.
Current Level	Shows customer's current level.
Total Points Awarded	Shows the total loyalty points that the customer has earned until that date.
Total Currency Awarded	Shows the total loyalty currency that the customer has earned until that date.
Total Points Redeemed	Shows the total loyalty points that the customer has redeemed until that date.
Total Currency Redeemed	Shows the total loyalty currency that the customer has redeemed until that date.
Available Points	Shows the total available loyalty points.
Available Currency	Shows the total available loyalty currency.
Available Redeemable Currency	Shows the redeemable currency against the loyalty points that customer has.
Total Expired Points	Shows the total points that has expired until that date.
Total Expired Currency	Shows the total currency that has expired until that date.
Buttons	
Billing Address	This button enables to specify the billing address of the customer. Click this button to open the Address Search screen and select the address.
Shipping Address	This button enables to specify the shipping address of the customer. Click this button to open the Address Search screen and select the address.
Comment	This button enables to enter additional free text related to the customer. Click this button to display the Comment Screen.
Account Details	This button enables to enter the credit limit for the customer. The Accounts Receivable screen is displayed on clicking the button. If subsidiary is enabled, it displays subsidiary wise credit limit.
Contacts	This button allows user to setup the contact details of the primary contact for the customer or the vendor.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Accounts Receivable

This screen enables the user to specify the credit limit for the customer. This credit limit is checked when the "Check Credit Limit" option in "Enterprise" screen is selected. If the "Manager Required for Credit Limit Override" option is selected in the retail profile, the manager would have to log into POS to complete a transaction when the customer is making an On Account payment and the credit limit for the customer has been crossed.

To open the screen, choose *Operations > Business Partner > Customer > Account Details*.

In case subsidiary is turned ON in the system, this window can be opened by *Operations > Business Partner > Customer > Subsidiary Account Details*.

Setup Screen

Field	Description/Activity
Code	This field show the code of the relevant subsidiary. This field is not editable. This is shown only in case Subsidiary is Turned ON in system.
Name	This field show the name of the relevant subsidiary. This field is not editable. This is shown only in case Subsidiary is Turned ON in system.
Sales Tax Code	Select the customer level tax code from the list of tax codes. Click … to open the Tax Code Search screen and select the 'sales tax code'. This is shown only in case Subsidiary is Turned ON in system.
Price List	Select a price list from the available list. Click … to open the Price List Search screen and select the 'price list'. This field is disabled if the ERP type is SAP Business One. This is shown only in case Subsidiary is Turned ON in system.
Credit Limit	Enter the credit limit to be set for the customer.
Balance	Customer's balance will be calculated automatically.
Order Balance	Customer's order balance will be calculated automatically.
Layaway Balance	Customer's layaway balance will be calculated automatically.
Balance Credit Limit	Customer's balance credit limit will be calculated automatically.
Tax Number	Enter the tax number of individual or that of company. This is shown only in case Subsidiary is Turned ON in system.
Electronic Id	Enter the electronic code of the security user. A unique code of a maximum 40 alphanumeric characters can be entered. This code is used if the user uses magnetic card to find out customer details in system instead of manually entering a customer id and other details. This is shown only in case Subsidiary is Turned ON in system.

Payment Type	Displays the payment types defined in the system. This is shown only in case Subsidiary is Turned ON in system.
Tax Exempt	Select this option if the customer is tax exempt. This is shown only in case Subsidiary is Turned ON in system.
Tax Free	Select this option if the customer is tax-free. This is shown only in case Subsidiary is Turned ON in system.
Is Active	Select this option if the customer is active. This is shown only in case Subsidiary is Turned ON in system.
On Hold	Select this option if the customer is on hold. This is shown only in case Subsidiary is Turned ON in system.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Customer Group

In order to setup a customer, you need to setup a customer group first. This feature is used to classify the customers into groups. Customer Groups can be used in grouping and filtering data in reports.

To open the screen, choose *Operations > Business Partner > Customer Group*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the customer group to be searched.
Description	Enter the description of the customer group to be searched.
Search Results	
Code	Displays the code of the customer group(s) searched.
Description	Displays the description of the customer group(s) searched.
Is Default	Display if the record is marked as default Customer Group.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Setup Screen

Field	Description/Activity
Code	Specify the code for the customer group. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Mention the description for the customer group. A description of maximum 100 alphanumeric characters can be entered.

Sales Tax Code	Select a customer group level tax code from the list of tax codes. Click … to open the Tax Code Search screen and select the code. This is shown only in case Subsidiary is Turned ON in system.
Is Default	If this flag is marked then the Customer Group will be marked as the default Customer Group. After doing this while creating Customer from iVend the Customer Group field will be populated by this Customer Group, however user have an option to change it to other Customer Group if required.
Discounts	Clicking this button would open a new screen Discounts setup for Customer Group from where the user will be able to setup the date range based discounts for this customer group.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Customer Catalog

The Customer Catalog helps in maintaining the code and description used by the customer for the various products setup in the system. It is maintained mainly by small and mid-size enterprises that provide customized services to their clientele.

To open the screen, choose *Operations > Business Partner > Customer Catalog* --> Select the customer for whom the catalog is being setup/modified.

Setup Screen

Field	Description/Activity
	Header Columns
Code	Enter the unique code for the customer catalog.
Description	Enter the description for the catalog. A description of maximum 100 alphanumeric characters can be entered.
Customer Code	Displays the code of the customer for whom the catalog is being setup.
Customer Name	Displays the first and last name of the customer for whom the catalog is being setup.
Version Date	Enter the date on which the catalog is last updated. To select click ▼ to open the calendar control and select the date. The default value for this field is the current date.
Version	Enter the version number of the catalog.
Subsidiary	Select a Subsidiary to which the Customer belongs from the list of Subsidiaries. Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field is visible, if subsidiary is enabled.
	Detail Columns
Product Code	Displays the code of the product being added in the catalog.

Product Description	Displays the description of the product being added in the catalog.
Code	This is a free text field where the user can specify product code or the bar code for the product as maintained by the customer.
Description	This is a free text field where the user can specify the product description as maintained by the customer.
Add Product	The button enables to add a product to the catalog. Click the button to open the Product Search screen and select the product. To add a new product, press "F3" or click on "F3 New" button in the Product Search screen.
Delete Product	This button enables to delete a product from the catalog.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Customer Printing

The Customer Printing helps in printing the text on the receipt defined in the system. Store manager can setup additional information to be printed on receipt for a particular customer or customer group.

To open the screen, choose *Operations > Business Partner > Customer Printing*.

Setup Screen

Field	Description/Activity
Header Columns	
Code	Enter the code for the printing. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the printing. A description of maximum 100 alphanumeric characters can be entered.
Print Information	Enter the text that is to be printed on receipt.
Source Type	Select the source on which this has to be applied. The valid values are • Customer • Customer Group
Source	Select the source based on the Source Type selected.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Vendor

This feature allows the user to search for the existing vendors and setup new vendors in the management console.

To open the screen, choose *Operations > Business Partner > Vendor*.

Search Screen

Field	Description/Activity

Search Criteria	
Code	Enter the code of the vendor to be searched.
Company Name	Enter the name of the company whose vendor(s) has to be searched.
Active	Select one of the following options: • **All** – To search all the vendors – active and inactive • **True** – To search only the active vendors • **False** – To search only the inactive vendors.
Phone Number, Mobile Phone	Specify the communication details of the vendor to be searched.
Search Results	
Code	Displays the code of the vendor searched.
Company Name	Displays the name of the company with which the vendor is associated.

SETUP SCREEN

Field	Description/Activity
Code	Enter a code for the vendor. A unique code of maximum 20 alphanumeric characters can be entered.
Company Name	Enter the company name. A name of maximum 100 alphanumeric characters can be entered.
Applicable Subsidiary	Allows selecting more than one subsidiary. Once assigned to a Subsidiary cannot be remove. It is visible if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Vendor Group	Select a group from the list of vendor groups. Click … to open the Vendor Group Search screen and select the vendor group.
Vendor Type	Select from the valid values: • Company • Private This is used for validating the Tax Number length for the Chile and Mexico localization.
Email, Web Page, Phone Number, Alternate Phone Number, Mobile Phone, Fax Number,	Specify communication details of the vendor.
Tax Number	Enter the Federal Tax Id, which can be a maximum of 50 characters long. If subsidiary is enabled, this field is removed from here and displays in screen "Subsidiary Account Details".
Primary Contact	Specify the name of the 'primary contact' for the vendor. Click …to open the Contact screen and create a new contact.

Purchase Tax Code	Select a code from the list of tax codes. Click … to open the Tax Code Search screen and select the 'purchase tax code' If subsidiary is enabled, this field is removed from here and displays in screen "Subsidiary Account Details".
Price List	Select a price list from the list. Click … to open the Price List Search screen and select the price list for the vendor. You can also add a price list where is set currency is other than the base currency. If subsidiary is enabled, this field is removed from here and displays in screen "Subsidiary Account Details".
Accounting Id	This is a system generated unique key for each vendor, which helps in integration of the Vendor Code in iVend with the Card Code in SAP Business One.
Tax Exempt	Select this option to mark the vendor as tax exempt. If subsidiary is enabled, this field is removed from here and displays in screen "Subsidiary Account Details".
On Hold	Select this option if the user wants to put the vendor on hold. Purchase Orders cannot be made for a vendor put on hold. If subsidiary is enabled, this field is removed from here and displays in screen "Subsidiary Account Details".
Active	Select this option to flag the vendor as active. Only active vendors are listed when a purchase order is created. By default, this option is enabled. If subsidiary is enabled, this field is removed from here and displays in screen "Subsidiary Account Details".
Address	
Address	Specify the address of the vendor. Click … to open the Address screen and specify.
Billing Address	Displays the billing address of the vendor. Click the Billing Address button to setup the address.
Shipping Address	Displays the shipping address of the vendor. Click the Shipping Address button to setup the address.
Buttons	
Billing Address	This button enables to specify the billing address of the customer. Click this button to open the 'Address Search' screen and select the address.
Shipping Address	The button enables to specify the shipping address of the customer. Click this button to open the Address Search screen and select the address.
Comment	The button enables to enter additional free text related to the vendor. Click the button to open the Comment Screen.
Associate Products	The button enables user to specify the product supplied by the vendor.
Subsidiary Account Details	This button enables user to specify subsidiary wise details of Purchase Tax Code, Price List, Tax Exempt and Tax Number.

	This button is visible, if subsidiary is enabled.
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Subsidiary Account Details

This screen enables the user to specify the purchase tax code and price list for the vendor subsidiary wise. The vendor can be set as active or inactive in different subsidiaries. Many more different options i.e., Tax exempt, Tax number etc. can be set for the vendor based on different subsidiaries.

To open the screen, choose *Operations > Business Partner > Vendor > Subsidiary Account Details*.

This screen will only be visible in case subsidiary is turned ON in the system.

SETUP SCREEN

Field	Description/Activity
Code	This field show the code of the relevant subsidiary. This field is not editable.
Name	This field show the name of the relevant subsidiary. This field is not editable.
Purchase Tax Code	Select the vendor level tax code from the list of tax codes. Click … to open the Tax Code Search screen and select the 'purchase tax code'.
Price List	Select a price list from the list. Click … to open the Price List Search screen and select the price list for the vendor.
Tax Exempt	Select this option if the vendor is tax exempt.
Tax Number	Enter the tax number of vendor or that of company
Is Active	Select this option if the vendor is active.
On Hold	Select this option if the vendor is on hold.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Vendor Group

In order to setup a vendor, user need to setup a vendor group first. This feature is used to classify the vendors into groups. Vendor Groups can be used in grouping and filtering data in reports.

To open the screen, choose *Operations > Business Partner > Vendor Group*.

SEARCH SCREEN

Field	Description/Activity
Search Criteria	
Id	Enter the code of the vendor group to be searched.

Description	Enter the description of the vendor group to be searched.
Search Results	
Id	Displays the Id of the vendor group(s) searched.
Description	Displays the description of the vendor group(s) searched.
Is Default	Display if the record is marked as default Vendor Group.

SETUP SCREEN

Field	Description/Activity
Id	Specify the id for the vendor group. A unique id of maximum 20 alphanumeric characters can be entered.
Description	Mention the description for the vendor group. A description of maximum 100 alphanumeric characters can be entered.
Is Default	If this flag is selected, then the Vendor Group will be marked as the default Vendor Group. After this, whenever the Vendor is created from iVend, then this vendor group will be assigned by default, however user have an option to change it to other Vendor Group, if required.
Buttons	
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Vendor Catalog

The Vendor Catalog helps in maintaining the code and description used by the vendor for the various products setup in the system. It is maintained mainly by small and mid-size enterprises that provide customized services to their client.

To open the screen, choose *Operations* > *Business Partner* > *Vendor Catalog* > Select the vendor for whom the catalog is being setup/modified.

SETUP SCREEN

Field	Description/Activity
Header Columns	
Code	Enter the unique code for the vendor catalog.
Description	Enter the description for the catalog. A description of maximum 100 alphanumeric characters can be entered.
Vendor Code	Displays the code of the vendor for whom the catalog is being setup.
Vendor Name	Displays the first and name of the vendor for whom the catalog is being setup.
Version Date	Enter the date on which the catalog is last updated. To select click ▼ to open the calendar control and select the date. The default value for this field is the current date.
Version	Enter the version number of the catalog.

Subsidiary	Select a Subsidiary to which the vendor belongs from the list of Subsidiaries. Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field is visible, if subsidiary is enabled.
Detail Columns	
Product Code	Displays the code of the product being added in the catalog.
Product Description	Displays the description of the product being added in the catalog.
Code	This is a free text field where the user can specify product code or the bar code for the product as maintained by the vendor.
Description	This is a free text field where the user can specify the product description as maintained by the vendor.
Add Product	The button enables to add a product to the catalog. Click the button to open the Product Search screen and select the product. To add a new product, press "F3" or click on "F3 New" button in the Product Search screen.
Delete Product	This button enables to delete a product from the catalog.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Master Till

From this, the user can setup the reusable tills.

To open the screen, choose *Operations > Till Management > Master Till*.

Search Screen

Field	Description/Activity
Search Criteria	
Store Code	Specify the Store Id for which the Master Till(s) have to be searched.
Code	Specify the code of the Master Till to be searched.
Description	Specify the description of the Master Till(s) to be searched.
Active	Specify the active status of the Master Till to be searched.
Search Results	
Code	Displays the code of the master till(s) searched.
Description	Displays the description of the master till(s) searched.
In Use	Displays the status of the master till(s) searched.
Active	Display the active status of the master till(s) searched.
[Assign Tills]	Select the master tills that are to be assigned. After selecting the master tills from the search result section, click the button Assign Till. This will assign tills to the user/teams.

	Only tills, which are not in use, will be assigned to user/team on clicking this button.

SETUP SCREEN

Field	Description/Activity
Code	Enter the code for the master till. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the master till. A description of maximum 100 alphanumeric characters can be entered.
Mode	Select one of the following modes. • **User** – The till can be assigned to a user. • **Team** – The till can be assigned to a team. All the users mapped to a team and with the "team banking" option enabled, can access the tills assigned to that team.
User/ Team	Select the user/ team to whom the till has to be assigned.
Variable Float Amount	Select this checkbox to enable variable float amount. Selecting this checkbox automatically mandates the Count Required On till assign. This setting ensures that the till amount counted by the cashier during the till assignment is considered as a float amount of the till.
Float Amount	Displays the starting amount that is assigned to the till. On assigning the till to user/team this float amount will become the opening amount for the till.
Store	Specify the store for which this master till is created.
POS	Specify the default POS to which this till is attached. If a POS terminal is assigned to a Till then upon login if the cashier logs on to the same POS the cashier does not have to select the till before moving from Till Assignment to the Transaction screen. The system will automatically associate the till to the POS when the user logs in iVend POS.
Variance Rate Type	The variance rate specifies the permissible rate of variance between the system count and the physical count of the till amount. Select amount or percentage type of variance rate as required.
Variance Allowed	Enter the value of variance allowed between the system and physical amount.
Count Required On Assign	Select from the list of option to specify whether the till count is mandatory, optional or is not required when the till is assigned to a POS.
Count Required On Close	Select from the list of option to specify whether the till count is mandatory, optional or is not required when the till is closed from the POS/ Management Console.
Count Required On Remove	Select from the list of option to specify whether the till count is mandatory, optional or is not required when the till is removed from the POS.
Count Required On Finalize	Select from the list of option to specify whether the till count is mandatory, optional or is not required when the till is finalized.
Warning Level	Enter the amount, which is the upper limit of the cash for the particular till. This is the tipple point beyond which the system starts giving a warning message.

	For example, if the warning level is set to $1000, the system will give a warning message if the amount will exceed $1000. If the user does not want a warning message, he/she can set the value in the field as 0.
Warning Interval	Enter the amount for the warning interval. If the interval is set to $100 for a warning level of $1000, system will warn the user for every $100 being added to $1000.
Lock Out Level	Enter the amount for lock out level. This field specifies the amount beyond which the POS is locked and no transaction can be done unless a manager override is done. If the user does not want the POS to get locked, he can set this value as 0.
Show System Count	Select the option if the amount as per the system count needs to be displayed in the "Till Count" screen. If this option is selected, the variance between the system count and the actual count is also displayed in the "Till Count" Screen.
Remove Till on Logout	This setting is introducted to support the self banking in iVend. Select this option in case you would like users till to get deassigned when the user logout of the system. This setting should be used in conjuction with "Login Per Sale" setting available in retail profile. The combination of these setting would ensure that multiple cashiers would be able to utilize the same PoS terminal for doing the transaction while maintaining a seprate individual tills.
[Ok]	This button updates changes to the database and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.

Till

This feature enables to search the details of various tills set up in the management console and create new tills. The default settings for the new till to be created are as defined in the 'Retail Profile'. The tills created in the system can have the following statuses:

- **New**: Newly setup till which has not been assigned to any POS. Only tills with the status 'new' are editable.
- **Assigned**: The till has been assigned to a POS.
- **De-assigned**: The till has been removed from the POS.
- **Closed**: The till is closed either from the POS or from Management Console and cannot be used for any more transactions. Only de-assigned tills can be closed.
- **Finalized**: The manager has finalized the till. Only closed tills can be finalized.

To open the screen, choose *Operations* > Till Management > *Till*.

Search Screen

Field	Description/Activity
Search Criteria	
Store Code	Specify the Store Id for which the till(s) have to be searched.
Code	Specify the code of the till to be searched.
Description	Specify the description of the till(s) to be searched.
Search Results	
Code	Displays the code of the till(s) searched.

Description	Displays the description of the till(s) searched.
Status	Displays the status of the till(s) searched.

SETUP SCREEN

Field	Description/Activity
Master Till	Select the Master Till, which is to be assigned to user/team.
POS	Specify the default POS to which this till is attached. If a POS terminal is assigned to a Till then upon login if the cashier logs on to the same POS the cashier does not have to select the till before moving from Till Assignment to the Transaction screen. The system will automatically associate the till to the POS when the user logs in iVend POS.
Mode	Select one of the following modes. • **User** – The till can be assigned to a user. • **Team** – The till can be assigned to a team. All the users mapped to a team and with the "team banking" option enabled, can access the tills assigned to that team.
User/ Team	Select the user/ team to whom the till has to be assigned.
Variable Float Amount	Select this checkbox to enable variable float amount. Selecting this checkbox automatically mandates the Count Required On Assign field.
Starting Amount	Displays the starting amount assigned to the till. The user cannot enter the starting amount directly in this field and would need to go to the "Till Count" screen by clicking on the "Till Count" button.
Variance Rate Type	The variance rate specifies the permissible rate of variance between the system count and the physical count of the till amount. Select amount or percentage type of variance rate as required.
Variance Allowed	Enter the value of variance allowed between the system and physical amount.
Count Required On Create	Select from the list of option to specify whether the till count is mandatory, optional or is not required when the till is created.
Count Required On Assign	Select from the list of option to specify whether the till count is mandatory, optional or is not required when the till is assigned to a POS.
Count Required On Close	Select from the list of option to specify whether the till count is mandatory, optional or is not required when the till is closed from the POS/ Management Console.
Count Required On Remove	Select from the list of option to specify whether the till count is mandatory, optional or is not required when the till is removed from the POS.
Count Required On Finalize	Select from the list of option to specify whether the till count is mandatory, optional or is not required when the till is finalized.
Warning Level	Enter the amount, which is the upper limit of the cash for the particular till. This is the tipple point beyond which the system starts giving a warning message. For example, if the warning level is set to $1000, the system will give a warning message if the amount will exceed $1000. If the user does not want a warning message, he can set the value in the field as 0.

Warning Interval	Enter the amount for the warning interval. If the interval is set to $100 for a warning level of $1000, system will warn the user for every $100 being added to $1000.
Lock Out Level	Enter the amount for lock out level. This field specifies the amount beyond which the POS gets locked and no transaction can be done unless a manager override is done. If the user does not want the POS to be locked, he can set this value as 0.
Show System Count	Select the option if the amount as per the system count needs to be displayed in the "Till Count" screen. If this option is selected, the variance between the system count and the actual count is also displayed in the "Till Count" Screen.
Remove Till on Log out	This setting is introducted to support the self banking in iVend. Select this option in case you would like users till to get deassigned when the user log out of the system. This setting should be used in conjunctionwith "Login Per Sale" setting available in retail profile. The combination of these settings would ensure that multiple cashiers would be able to utilize the same POS terminal for doing the transaction while maintaining a separate tills.
Till Count	This button enables to set up the starting amount for the till. Click on this button to open the "Till Count" screen.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Till Count

This feature helps in auditing and reconciling the till amounts. It enables the user to map the physical and system count of the amount and the related documents. The till amounts of all the tills except the finalized ones can be counted from this screen.

If the user checks the 'Show System Count' checkbox in the 'Retail Profile' setup, the fields 'Opening Amount', 'System Amount' and 'Variance' are displayed in the Till Count screen.

To open the screen, choose Till Management ⍰ Till Count or click on the "Till Count" button on the till data setup screen.

Search Screen

The search screen is displayed if the user chooses the *Operations > End of Day > Till Count* option.

Field	Description/Activity
Search Criteria	
Store code	Specify the Store code for which the till(s) have to be searched.
Code	Specify the code of the till to be searched.
Description	Specify the description of the till(s) to be searched.
Search Results	
Code	Displays the code of the till(s) searched.
Description	Displays the description of the till(s) searched.
Status	Displays the status of the till(s) searched.

Select the till for which the till amount needs to be counted and click on the "Ok" button.

DATA VIEW SCREEN

Field	Description/Activity
Payment Type	Displays the payment types defined in the management console with the "Counted" option selected.
Opening Amount	Displays the starting amount for the payment type specified while setting up the till.
System Amount	Displays the total amount for the specific payment type as computed by the system.
Amount	Enter the amount after the physical count of the specific payment type.
Variance	Displays the variance between the System Amount and the Amount entered by the user after counting the currency and documents.
Document Count	Enter the number of receipts or any other documents related to the till. This field is mainly for credit and debit card payment types.
Details	The button enables to enter the count of the payment type as per the denomination. Click the button to display the Till Detail Count Screen and enter the count. The button is enabled only for the payment type 'Cash' for which the 'Detail' option is selected in the 'Count Type' dropdown of the Payment Type Screen.
Ok	The button saves the changes and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Remove Till

This feature enables to remove the assigned tills. A till can be removed either from the POS or from Management Console. Only tills in the assigned status can be removed.

To open the screen, choose *Operations > End of Day > Remove Till*.

SEARCH SCREEN

Field	Description/Activity
Search Criteria	
Store Code	Specify the Store Id for which the assigned till(s) have to be searched.
Code	Specify the code of the assigned till to be searched.
Description	Specify the description of the assigned till(s) to be searched
Search Results	
Code	Displays the code of the till(s) searched.
Description	Displays the description of the till(s) searched.
Status	Displays the status of the till(s) searched. (Only assigned tills are displayed in the search results)

Ok	This button saves the changes and closes the screen. To Remove the till, the user selects a row in the search results grid and clicks the Ok button. It updates the status of the till to 'de-assigned'. If the checkbox 'Count Required On Remove' is enabled at the Till Screen, on clicking the Ok button the 'Till Count View' screen appears.
Cancel	The button enables the user to close the screen.

Close Till

This feature enables to close the tills. A till is closed either from the POS or Management Console and once closed cannot be used for any transaction. Only tills in the de-assigned status can be closed.

To open the screen, choose *Operations > End of Day > Close Till*.

SEARCH SCREEN

Field	Description/Activity
Search Criteria	
Store Code	Specify the Store Id for which the de-assigned till(s) have to be searched.
Code	Specify the code of the de-assigned till to be searched.
Description	Specify the description of the de-assigned till(s) to be searched
Search Results	
Code	Displays the code of the till(s) searched.
Description	Displays the description of the till(s) searched.
Status	Displays the status of the till(s) searched. (Only de-assigned tills are displayed in the search results)
[Ok]	This button saves the changes and closes the screen. To close the till, the user selects a row in the search results grid and clicks the Ok button. It updates the status of the till to 'Close'. If the checkbox 'Count Required On Close' is enabled at the Till Screen, on clicking the Ok button the 'Till Count View' screen appears.
[Cancel]	The button enables the user to close the screen.

Finalize Till

This feature enables to finalize the tills. A till can be finalized only from the Management Console and not from the POS. Only tills in the closed status can be finalized.

To open the screen, choose *Operations > End of Day > Finalize Till*.

SEARCH SCREEN

Field	Description/Activity
Search Criteria	
Store Code	Specify the Store Id for which the closed till(s) have to be searched.
Code	Specify the code of the closed till to be searched.
Description	Specify the description of the closed till(s) to be searched.
Search Results	
Code	Displays the code of the till(s) searched.
Description	Displays the description of the till(s) searched.
Status	Displays the status of the till(s) searched. (Only closed tills are displayed in the search results)
Ok	This button saves the changes and closes the screen. To finalize the till, the user selects a row in the search results grid and clicks the Ok button. It updates the status of the till to 'Finalize'.

	If the checkbox 'Count Required On Finalize' is enabled at the Till Screen, on clicking the Ok button the 'Till Count View' screen appears.
Cancel	The button enables the user to close the screen.

End of Day

This is the closing activity for the day and closes the current business date for a store. The end of day activity can only be performed for a store when all the users have clocked out and all the tills are closed.

To open the screen, choose *Operations > End of Day > End of Day*.

Setup Screen

Field	Description/Activity
Current Business Date	Displays the current business date for the store for which the end of day activity is being carried out.
Store Code	Displays the code of the store for which the end of day activity is being completed.
Store Description	Displays the description of the store for which the end of day activity is being completed.
Next Business Date	Enter the next business date for the store for which the end of day activity is being carried out. To select click ▼ to open the calendar control and select the date. The default value for this field is the date calculated as (Current Business Date + 1).
Optimize Database	Check this flag if you would like to run a database optimization script after completing the End Of Day Process.
Upgrade Available	This flag is checked by the system if there is an upgrade available for the store system. This flag is read only.
Start	Click the button to perform the end the day activity. The system displays an error message if any POS user has not clocked out or any of the till is not closed. If the system is configured to Reassign All Tills At End Of Day then all the master Tills will be automatically assigned to User / Team on running this activity.
Cancel	The button enables the user to close the screen.

Loyalty Configuration

The Loyalty Setup screen have fields, which are used for basic configuration of loyalty program. Description/Activity of all the fields on loyalty setup screen are explained below.

To open the screen, browse through *Operations > Loyalty > Loyalty Program*.

Setup Screen

Field	Description/Activity
General	

Code	Enter the loyalty program code.
Description	Enter the loyalty program description.
Applicable Subsidiary	This field is enabled, when the field "**multiple subsidiary enabled**" is checked at Enterprise screen. Select the subsidiaries, which will be applicable for the loyalty program you are creating. **Note:** Only subsidiaries with the same base currency can be added to a loyalty program.
Registration Method	Registration Method is used for deciding how a loyalty card number for the customer will be generated. Once this is set and a loyalty customer is created, this field becomes non-editable. A Loyalty customer can be registered in the system based on three options and the valid values are: • **Customer Code:** If this is selected, the Customer Code generated from the iVend Retail system is also the Loyalty Card Number • **Loyalty Card**: If this is selected, the Loyalty Card Customer is created from the Loyalty Card screen. • **Loyalty Card Attach to customer code:** If this is selected then user can have both, a Customer Code generated out of the iVend Retail system and a Loyalty Card Number from the business partner > customer screen. Both Customer Code and a Loyalty card number can track loyalty details since they are linked.
Card Management	Card Management is used to determine, what kind of Loyalty Card Number is used. Once this is set and a loyalty customer is created, this field becomes non-editable. Valid values are: • **Auto Generated:** If this option is selected system automatically, assign loyalty card number when creating the loyalty customer from Loyalty Card/Customer screen. In this case a number series needs to be created with Document Type selected as Loyalty Card, by navigating from Administration > System Initialization > Document Number Series. Each store will require different series. • **Pre-Printed**: If this option is selected system will prompt user the list of available loyalty card numbers, when creating a loyalty customer from Loyalty Card/Customer screen. To create the pre-printed Loyalty card use Preprinted Loyalty Card sub menu. • **User Defined**: If this option is selected user can enter the loyalty card number while creating a loyalty customr. **Note:** If user selects Registration Method as Customer Code, then the value selected in this field is will have no impact.
Level Allocation Method	Select the Level Allocation Method to determine the criteria used to manage loyalty level for customer. The possible values are: Total Available Points Total Awarded Points Total Available Currency Total Awarded Currency

Award Loyalty Points on Registration	Enter the number of loyalty points, user wants to award as welcome points on loyalty customer registration.
Award Loyalty Currency Unit on Registration	Enter the number of currency units, user wants to award as welcome currency on loyalty customer registration.
Award Criteria	Select the award criteria, which is used to create a plan from the Loyalty Plan screen based on selected option. Valid values are: • **Every Transaction:** Every Transaction rewards customer immediately after the transaction has done on POS using the input defined in Loyalty Plan screen for the field Transaction On having values Every, Equal, and Greater • **Cumulative Basis:** Cumulative Basis reward customers for historical transactions done at their stores using the amount/quantity bought during a predefined number of elapsed days. For example, one could configure this plan to award 500 currency units if a loyalty customer has spent an average of 10000 USD over the past 180 days.
Duration for Customer – Special Days	In the Loyalty Plan screen when the Plan Type is selected as SpecialDaysForCustomer, with values Birth Date and Anniversary, this field will determine the duration for which the plan will be active. Valid Values are: • **Day**: SpecialDaysForCustomer loyalty plan will award points only on customer's birthday, anniversary date as per selection in Loyalty Plan screen • **Week**: SpecialDaysForCustomer loyalty plan will award points on customer's birthday week, anniversary week as per selection in Loyalty Plan screen • **Month**: SpecialDaysForCustomer loyalty plan will award points on customer's birthday, anniversary month as per selection in Loyalty Plan screen • **Days Backward Forward**: User can define the custom date range before and after customer's birthday, anniversary using values in Customer Special day's Backward/Forward field below.
Customer Special days Backward/Forward	Enter the days before and days after customer's birthday, anniversary. This field is mandatory and value should be greater than 0, only if user has selected Days Backward Forward for the above field (Duration for Customer–Special Days)
Conflict Resolution Basis	Conflict Resolution Basis option is used to determine the criteria to calculate the loyalty points/currency, if multiple Loyalty plans are active and/or multiple rows exists within an active loyalty plan. Valid values are: • **Global:** Points/currency to be awarded to customer will be calculated based on the value selected in the field below (Conflict Resolution Method) in Loyalty Setup screen • **Plan Global:** Points/currency to be awarded to customer will calculated in two steps. First based on the value in the field Conflict Resolution Method (Loyalty Plan screen), giving one value from each eligible plan and if there are more than one eligible plan, Final Points/currency to be awarded to customer is calculated based on the value selected in the field below Conflict Resolution Method in (Loyalty Setup screen)

Conflict Resolution Method	Conflict Resolution Method is used to calculate the loyalty points/currency, if multiple Loyalty plans are active and/or multiple rows exists within an active loyalty plan. Valid values are: • **Minimum**: Minimum points/currency will be awarded to customer from multiple eligible plans. • **Maximum**: Maximum points/currency will be awarded to customer from multiple eligible plans. • **Sum** Total: Total of points/currency will be awarded to customer for all the eligible plans. • **Average**: Average points/currency will be awarded to customer for all the eligible plans.
Level Management Method (Days)	Level Management Method is used to determine the method used to upgrade, downgrade or retain customer's level based on the points/currency which are available/awarded to customer as per Level Allocation Method. Valid values are: • **Manual**: All the customers will retain their current level unless updated manually. • **Automatic**: On every transaction, which updates points/currency for the customer, system updates the level based on the threshold limits defined in Loyalty Level screen for each level. • **Automatic After X Days**: System will calculate and update the customer's level after X number of days entered in the Days field.
Redemption Method	Redemption Method is used to determine the criteria using which the redemption of points will be calculated. Valid values are: • **Current Level**: When calculating the currency available for redemption, consider the Points-to-Currency conversion ratio and redemption percentage defined for the customer's current level only. • **FallBack**: When calculating the currency available for redemption consider the Point-to-Currency conversion ratio and redemption percentage defined for customer's loyalty level as per sliding level concept.
Refund Method	Refund Method is used to setup mechanism, that Loyalty system will use to roll back the points/currency, when a refund is done at POS. Valid values are: • **All Rewards:** Select this option to roll back all points/currency awarded to the customer even if there is a partial refund happening. For example, if the customer had purchased 3 items and was awarded 30 points then all 30 points shall be rolled back even if the customer wishes to refund just one item. • **On pro-rate basis:** Select this option to roll back points/currency awarded to the customer on a pro-rate basis. For example, if the customer had purchased 3 items, was awarded 30 points, and is now claiming a refund on one item, then the system will roll back just 10 points instead of all 30 points. • **Do not refund rewards:** Select this option for not to roll back any points/currency awarded to the customer on refund transaction.
Points Expiry Override Allowed	Points Expiry Override Allowed check box when checked gives an extension to the expiry period based on the values given in the field Override Points Expiry Date With In (Days) and Grace Period (Days) Allowed For Points Expiry Date Override given below.

Override Points Expiry Date With In (Days)	Override Points Expiry Date With In (Days) is used to enter the number of day, which determine the date by when override will be allowed.
Grace Period (Days) Allowed For Points Expiry Date Override	Grace Period (Days) Allowed For Points Expiry Date Override is used to enter the number of days until which the points/currency will be available for redemption by the customer in case of expiry override.
Enable Email Notification	Enable Email Notification when checked enable email notification for loyalty customers.
Enable SMS Notification	Enable SMS Notification when checked enable SMS notification for loyalty customers.
Email/SMS Service Interval (Minutes)	Email/SMS Service Interval (Minutes) is used to define the number of minutes as interval for sending email and SMS notification for loyalty customers.
Exchange Loyalty Data Between Store	Exchange Loyalty Data Between Store is checked to enable visibility and use of the transaction of loyalty customer done at one store to all other store defined for that enterprise.
Award Points on Loyalty Tender	Check this flag if you wish to award points as per plan on redemption activity.
Do Not Award Points with Redemption	Select this checkbox if you do not want to award loyalty points on the transaction in which the customer has redeemed the loyalty points.
Include Tax In Award Points	Select this checkbox if you want to award points based on the tax inclusive price. For example, if a product has a price of $90 and tax of $10, then if the setting is ON then the points will be awarded on $100 whereas if the setting is turned OFF then the points will be awarded on $90 only.
View Transaction Receipt On Customer Website	
Enable Transaction Receipt	Check this flag to synchronize the transaction receipt with customer portal.
Loyalty Website Link	Enter the link of the customer portal.
Report Name	Enter the Name of the report to be shown for transaction receipt on customer portal.
Company Information	

Company Name	Enter the name of the company and this field is visible if ivend Retail is running in Loyalty stand-alone mode.
Logo	Browse and save the logo of the company and this field is visible if ivend Retail is running in Loyalty stand-alone mode.
Buttons	
[OK]	This button saves the changes and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.
[Points Expiry Setup]	This button allows user to setup the expiry configuration for Loyalty points/currency based on certain permutations and combination.
[Add Logo]	This button enables the user to browse and add logo under company information. This button is enable if iVend Retail is running in Loyalty stand-alone mode.
[Remove Logo]	This button removes the logo under company information. This button is enable if iVend Retail is running in Loyalty stand-alone mode.
[Referral Setup]	This button opens a new screen and allow the user to setup, award for referral program.
Points Expiry Setup	
Expiry Method	Expiry Method is used to determine the criteria to calculate the date for executing the points/currency expiry process. Valid values are: • **Sliding**: If user selects Sliding as Points Expiry Method, then he/she will be required to enter, number of days in field Point Expiry Days on this screen. This means points/currency expiry date will be calculated by adding number of days defined in the field (Point Expiry Days) to the transaction date for which customer was awarded points/currency. • **Fixed**: If user selects Fixed as Points Expiry Method, then he/she will be required to enter, a date in the field Point Expiry Date, which will be considered as points/currency expiry date.
Customer Type	Customer Type is used to select loyalty customers for whom user wish to create this expiry rule. Valid values are, • **All**: If user enters All, then the expiry process will be executed for All the loyalty customers as defined in this row. • **CustomerCode**: If user enters Customer Code then, on click of the next field Customer Value system will open the customer search screen, from which user can select a customer for whom he/she wish to define this rule. • **CustomerGroup**: If user enters Customer Group then, on click of the next field Customer Value system will open the customer group search screen, from which user can select a customer group for whom he/she wish to define this rule.
Customer Value	The value selected in this field depends on the value in Customer filed. The expire rule defined in this row will be executed only on the selected loyalty

	customers in this field in combination with other criteria defined in other fields. • **All**: This field will remain blank and user will not be allowed to enter any value. • **CustomerCode**: User will need to select customer code from customer search screen, which is opened on click of this field. • **CustomerGroup**: User will need to select customer group from customer group search screen, which is opened on click of this field.
Level	User can select Loyalty Level from Loyalty Level Search Screen, which is opened on click of this field. The expiry rule refined in this row will be executed only for loyalty customers at the selected level.
Expiry Days	If user has selected Sliding as Points Expiry Method, then he/she will be required to enter, number of days in this field. This means points/currency expiry date will be calculated by adding number of days entered in this field to the transaction date for which customer was awarded points/currency.
Expiry Date	If user selects Fixed as Points Expiry Method, then he/she will be required to enter, a date in this field. The date entered here will be considered as points/currency expiry date.
Buttons	
[OK]	This button saves the changes and closes the point's expiry screen.
[Cancel]	This button does not save any changes and closes the point's expiry screen.

Referral Setup

Field	Description/Activity
Award Bonus Points on Registration	Enter the bonus points, you wish to award to referrer on registration of referee.
Award Bonus Currency on Registration	Enter the bonus currency, you wish to award to referrer on registration of referee.
Award Bonus Points' on First Transaction	Enter the bonus points, you wish to award to referrer when referee does his first transaction.
Award Bonus Currency	Enter the bonus points, you wish to award to referrer when referee does his first transaction.
Threshold Setup	
Threshold Points	Enter the threshold points that referee needs to earn for making the referrer get his award.
Threshold Currency	Enter the threshold currency that referee needs to earn for making the referrer get his award.

Award Bonus Points	Enter the award points, that referrer is awarded, when referee achieve the threshold points.
Award Bonus Currency	Enter the award points, that referrer is awarded, when referee achieve the threshold currency.
Button	
Add Row	Click this button to add another threshold setup row.
Delete Row	Click this button to delete the selected row(s) in threshold setup.
[Ok]	This button saves the changes and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Loyalty Special Days

The feature allows the user to search for Loyalty Special Days and setup, new Loyalty Special Days in the Management Console.

To open the screen, choose *Operations > Loyalty > Loyalty Special Days*

Search Screen

Field	Description/Activity
Search Criteria	
Id	Enter the Id of the Loyalty Special Days to be searched.
Description	Enter the description of the Loyalty Special Days to be searched.
Active	This field is used to search based on status of Loyalty Special Days. Valid values are: • **All** - To search for all the Loyalty Special Days setup in the system. • **True** - To search for the Loyalty Special Days with 'Active' option enabled. • **False** - To search for the Loyalty Special Days with 'Active' option not enabled.
Loyalty Program	Select the Loyalty Program to be searched.
Search Results	
Code	Displays the code of Loyalty Special Days searched.
Description	Displays the description of the Loyalty Special Days searched.
Active	Indicator of whether the Loyalty Special Days is active or not.
Special Date	Displays the date of the Loyalty Special Day(s) searched

Setup Screen

Field	Description/Activity
Loyalty Program	Select the Loyalty Program.

Code	Specify the code for the Loyalty Special Days. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the Loyalty Special Days. A description of maximum 100 alphanumeric characters can be entered.
Special Date	Enter the date from in format MM/DD/YYYY or select from calendar.
Active	Select this option mark the Loyalty Special Days as active. By default this option is enabled
Button	
[Ok]	This button saves the changes and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Loyalty Notification

This screen allows user to create notification of inbuilt events configured in Loyalty so that notification is sent to the loyalty customers.

To open the screen, choose *Operations > Loyalty > Loyalty Notification*.

Search Screen

Field	Description/Activity
Search Criteria	
Id	Enter the Id of the loyalty notification to be searched.
Description	Enter the description of the loyalty notification to be searched.
Loyalty Program	Select the loyalty program to be searched.
Search Results	
Code	Displays the code of the loyalty notification searched.
Description	Displays the description of the loyalty notification (s) searched.

Setup Screen

Field	Description/Activity
General	
Loyalty Program	Select the Loyalty Program.
Code	Enter a code for the loyalty notification. A unique code of a maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the loyalty notification. A maximum of 50 alphanumeric characters can be entered.
Type	Select the type of loyalty notification. Valid values are: • **User Creation:** Selected to send notification to loyalty customers at the time of registration of loyalty customers.

	• **N Points Away From Next Level:** Selected to notify loyalty customers about points to reach next loyalty level. • **User Crosses Into Next Level:** selected to send notification to loyalty customers when loyalty customers Crosses into next level. • **Loyalty Points Statement:** Selected to send points statements to loyalty customers • **User Award Redeem Points:** Selected to send notification when loyalty customers accumulate points or redeem points on POS. • **Points Are About To Expire:** Selected to send notification when points of loyalty customers are about expire.
Email/SMS Template	User can select the email template from the Email SMS Template Search screen.
Email From	Enter the email from which user want to send notification.
Email Display Name	Enter the display name in sending emails.
Interval (Days)	This field depends on the value selected in Type field. For the notification type, which are not triggered on an event, this field, is editable and user can enter the no of day after which the configured email should be sent.
N Points away from next level	Enter the N points away from the next level and this event will be triggered if user is N point away from next level.
Points Expiring in Next (days)	Enter the days and this event will be triggered if points are about to expire within given number of days.
Buttons	
[OK]	This button saves the changes and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.

Loyalty Level

The feature allows the user to search for Loyalty Levels and setup a new Loyalty Level in the Management Console.

To open the screen, choose *Operations > Loyalty > Loyalty Level*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the loyalty level to be searched.
Description	Enter the description of the loyalty level to be searched.
Loyalty Program	Select the loyalty program of which data needs to be searched.

Search Results	
Code	Displays the code of loyalty levels searched.
Description	Displays the description of the loyalty levels searched.
Minimum Value	Displays the minimum value required to qualify the loyalty level(s) searched.
Points Conversion Factor	Displays the points conversion factor of the loyalty level(s) searched.
Points To Local Currency	Displays the points to local currency factor of the loyalty level(s) searched.
Redemption Percent	Displays the redemption percentage of the loyalty level(s) searched.
Button	
[Recalculate Level]	On the click of recalculate button the system will prompt a message and on confirmation will update the loyalty level for all loyalty customers as per the threshold set in Loyalty Level Screen.

Setup Screen

Field	Description/Activity
General	
Loyalty Program	Select the loyalty program.
Code	Enter the code for the loyalty level. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the loyalty level. A description of maximum 100 alphanumeric characters can be entered.
Minimum Value to attain this level	Enter the minimum points/currency required for attaining/retaining the loyalty level.
Points Conversion Factor	Enter the point's conversion factor. This is used to calculate the currency available for redemption.
Points To Local Currency	Enter the points to local currency. This is used to calculate the currency available for redemption along with Points Conversion Factor.
Maximum Redemption Percent Allowed Per Transaction	Enter the redemption percent, which is used to calculate the number of points a loyalty customer can redeem as per defined level.
Button	
[Ok]	This button saves the changes and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Loyalty Plan

Loyalty Plan is used to award points to loyalty customer. The loyalty plan can be setup with combinations and permutation of various fields defined in this screen.

To open the screen, choose *Operations > Loyalty > Loyalty plan.*

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the plan to be searched.
Description	Enter the description of the plan to be searched.
Active	This field is used to search the Loyalty Plans based on its status. Valid values are: • **All** - To search for all loyalty plans in the system. • **True** - To search for the loyalty plans with 'Active' option enabled. • **False** - To search for the loyalty plans with 'Active' option not enabled
Loyalty Program	Select the loyalty program of which data needs to be searched.
Search Results	
Code	Displays the code of the plan searched.
Description	Displays the first name of the plan(s) searched.

Setup Screen

Field	Description/Activity
General	
Loyalty Program	Select the loyalty program.
Code	Enter a code for the loyalty plan. A unique code of a maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the loyalty plan. A maximum of 50 alphanumeric characters can be entered.
Plan Type	Select the type of the loyalty plan. Valid values are: • **Normal Plans:** These plans are regular plans that are executed whenever a loyalty transaction occurs at the POS. There can be more than one normal plan active in the system. • **Special Days Plans:** These plans are those, which are executed on special days defined in the system. There can be more than one special day plan active in the system. • **Special Days for Customers Plans:** These plans are those, which get executed on birthdays and anniversaries of customers. There can be more than one Special Days for Customer Plan active in the system.
Start Date	Select a date from which the plan is applicable. By default, the current date is pre-populated.
Start Time	Enter the time from which the plan is applicable. By default, midnight time is pre-populated.

End Date	Select a date until which the plan is applicable. The plan will be automatically deactivated after this date. If no date is entered, the plan will continue to run for an infinite period until it is manually deactivated.
End Time	Enter the time until which the plan will be active.
Transaction Days Before	This is only applicable for loyalty cumulative plan type. Enter the Transaction Days Before to calculate for cumulative plans. **Note:** This field is available when the value of Award Criteria in Setup Screen is set as CumulativeBasic.
Active	Check this option to mark the loyalty plan as active. Only active plans would be awards points at POS to loyalty customer.
Buttons	
[Add Row]	Click for add loyalty plan details row.
[Delete Row]	Click for delete selected loyalty plan details row.
[Applicable]	Click for adding the store for which the plan will be applicable. On click of the button system will open Loyalty Plan Applicability screen having a button to Add Store and Delete Store, through which a Store can be searched and added to the loyalty plan. User can also select specific days and time of the week e.g. Monday, Friday etc. for each store if he/she wish to run this plan on specific days. This is available only when, the value of Award Criteria in Setup Screen is set as EveryTransaction.
[Exception Rule/Special Days Setup]	Click this button for adding some predefined exception rules and Special Days. Special Days section will only appear only when the Plan Type is defined as SpecialDays. This section will have two buttons to Add Special Days and Delete Special Days. Predefined exception rules are provided on this screen that will exclude all items configured in the loyalty plan if they fall under the exception rule. The exception rules are: • **Exclude all items on promotion: All** items marked as promotional in the retail database shall not be considered for points/currency award even if they appear in the loyalty scheme. • **Exclude all items with discount override:** All items that are allowed for a discount override in the retail database shall not be considered for points/currency award even if they appear in the loyalty scheme. • **Exclude all items with discount greater than X percent:** All items that have already been given a discount (greater than X percent) in the retail database shall not be considered for points/currency award even if they appear in the loyalty scheme. However, when a discount percentage is specified in the exclusion list, items having a lesser discount shall be considered during award of rewards. For example, consider and item ITM001, which has a discount of 10%, and ITM002 that has a discount of 5%. If a value of 6% is specified in the exclusion list then ITM002 shall be considered during points/currency award while ITM001 shall be ignored, as the discount percentage is greater than 6%. • **Exclude all items with price override:** All items that are allowed for a price override at the point of sale (POS) shall not be considered for points/currency award even if they appear in the loyalty scheme. • **Exclude all items with price override greater than X amount:** All items that are allowed for a price override greater than X amount, at the

	point of sale (POS) shall not be considered for points/currency award even if they appear in the loyalty scheme. However, when a price amount is specified in the exclusion list, items having a lesser price shall be considered during award of rewards. For example, consider and item ITM003, which has a price USD 200, override price USD 250 and ITM004 that has a price USD 400, override price USD 420. If a value of USD 40 is specified in the exclusion list then ITM004 shall be considered during points/currency award while ITM003 shall be ignored as the override price difference (USD 250- USD 200 = USD 50) is greater than value set as USD 40. • **Exclude items on layaway:** All items marked as layaway items in the retail database shall not be considered for points/currency award even if they appear in the loyalty scheme. **Note**: This is available only when, the value of Award Criteria in Setup Screen is set as Every Transaction.
[OK]	This button saves the changes and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.
Plan Details	
Exempt	Select this check box against each line of Plant Detail if you wish the awards engine to ignore the line while awarding points.
Must Process	Select this check box against each line of Plan Details if you wish the awards engine to mandatorily process this line while awarding points. The “Exempt” and the “Must Process” check boxes are mutually exclusive and only one of the two can be checked per line.
Customer Type	Customer Type is used to select loyalty customers for whom user wish to create this loyalty plan. Valid values are: • **All**: If user enters All, then the loyalty plan will be executed for All the loyalty customers as defined in this row. • **CustomerCode**: If user enters Customer Code then, on click of the next field Customer Value system will open the customer search screen, from which user can select a customer for whom he/she wish to define this rule. • **CustomerGroup**: If user enters Customer Group then, on click of the next field Customer Value system will open the customer group search screen, from which user can select a customer group for whom he/she wish to define this rule.
Customer Value	The value selected in this field depends on the value in Customer filed. The loyalty plan defined in this row will be executed only on the selected loyalty customers in this field in combination with other criteria defend in other fields. • **All**: This field will remain blank and user will not be allowed to enter any value. • **CustomerCode**: User will need to select customer code from customer search screen, which is opened on click of this field. • **CustomerGroup**: User will need to select customer group from customer group search screen, which is opened on click of this field.
Level	Select a specific level to configure the award of points for a particular level.
Criteria Group	Criteria Group is used to define a plan for a selected group of customers based on different values. The valid values are:

	• **All**: Selecting “All” will apply the loyalty plan for all the criteria groups. This is the default value. • **Items**: Selecting “Items” will apply the loyalty plan for the item selected in Criteria Value field. • **ItemGroup**: Selecting “Item Group” will apply the loyalty plan for the Item Group selected in Criteria Value field. • **Promotion**: Selecting “Promotion” will apply the loyalty plan for the promotion selected in Criteria Value field. • **Layaway**: Selecting “Layaway” will apply the loyalty plan for the Layaway items selected in Criteria Value field. • **BillValue**: Selecting “BillValue” will apply the loyalty plan on transactions with bill value greater than equal to the one specified in Criteria Value field. • **BillQuantity**: Selecting “BillQuantity” will apply the loyalty plan on transactions with Bill Quantity greater than equal to the one specified in Criteria Value field.
Criteria Value	This column is dynamically populated to be selected or requires a value to be entered based on the value selection made for the previous “Criteria Group” field for this row.
Transaction On	Transaction On column is displayed when the Award Criteria defined in Loyalty Setup is EveryTransaction. The valid values are: • **Every**: Selecting “Every” will apply the loyalty plan on every transaction. • **Equal**: Selecting "Equal" will apply the loyalty plan only for the transactions whose count is equal to the value specified in the "Transaction Count" field. • **Greater**: Selecting "Greater” will apply the loyalty plan only for the transactions whose count is equal to the value specified in the "Transaction Count" field.
Transaction Count	The Transaction On column is displayed only when the Award Criteria defined in Loyalty Setup is EveryTransaction. User can enter the number of transaction counts according to the value selected in the Transaction On column.
Calculation Basis	This column allows user to specify the basis on which the points are calculated and awarded. The valid values are: • **Amount**: If “Amount” is selected system, calculate points based on the bill amount value specified in the Calculation Value column. The “Amount” option is not available when Bill Quantity is select in the Criteria Group column. • **Quantity**: If “Quantity” selected then system calculates the points based on the quantity value specified in the Calculation Value column. The Quantity option is not available when “Bill Value” is selected in the Criteria Group column.
Calculation On	This column allows the user to specify if the award point calculations The valid values are: • **Every**: If “Every” option is selected the points are awarded on the each recurrence of value specified in the “Criteria Value” column. For example if the “Calculation Basis” value is “Amount”, the “Calculated On” value is “Every” and the “Calculation Value” column has 100 as the value, then for every 100 currency units spent by the customer, the system would award as many points/currency specified in the “Award Value” column.

	• **Greater or Equal:** if "Greater or Equal" option is selected points are awarded when the transaction value is either greater or equal to the value specified in the Calculation Value column.
Calculation Value	This column is used to specify a numeric value based on which the points would be calculated and awarded in coordination with value selected in "Calculation Basis" column.
Tender	This column is used to specify the type of payment for which this loyalty plan will get executed. This option is available only when "Bill Value" is selected in the Criteria Group column. Select a type of tender such as Credit Card, Debit Card or Cash if you wish to award points only when the configured tender is used for payment against a loyalty transaction.
Award	This column allows user to specify the type of reward that the customer should be awarded because of a loyalty transaction. Valid values are: • **Point**: When "Point" is selected, the customer is always awarded loyalty points. • **Currency**: When "Currency" is selected, the customer is always awarded currency units. Configuration of multiple lines awarding points as well as currency is allowed in the application
Award Value	Enter the number of points or currency units that the customer should be awarded when he/she qualifies for rewards.

Loyalty Membership Group

This screen allows you to manage loyalty membership groups provided it is enabled in the system. The loyalty application allows user to create logical groups of existing loyalty members so that they can enjoy the benefits of rewards together as a group. When a group is formed, all the individual points of the members is combined together to arrive at a combined level. For example, if three members in a family are loyalty members where two are Bronze members and the other is a Silver member, then because of aggregation of their points they could collectively attain the status of Gold membership. From there on they can redeem the rewards applicable to Gold members and points shall also be awarded based on the Gold membership status. However, their individual status is no longer valid and the system will always track their transactions based on group membership. If a member decides to leave the group, the member forfeits all the points and currency and starts at the lowest level as an individual member defined in the system.

To open the screen, choose *Operations > Loyalty > Membership Group*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the loyalty membership group to be searched.
Description	Enter the description of the loyalty membership group to be searched.
Active	Select one of the following scenarios: • **All** - To search for all loyalty plans in the system. • **True** - To search for the loyalty plans with 'Active' option enabled. • **False** - To search for the loyalty plans with 'Active' option not enabled.

Loyalty Program	Select the loyalty program of which data needs to be searched.
Search Results	
Code	Displays the code of the loyalty membership searched.
Description	Displays the first name of the loyalty membership (s) searched.
Active	Shows the status of the group, if it is active or not.

Setup Screen

Field	Description/Activity
Loyalty Program	Select the loyalty program.
Code	Enter a code for the membership group. A unique code of a maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the membership group. A maximum of 50 alphanumeric characters can be entered.
Available Points	Display the available points of the membership group.
Available Currency	Display the available currency of the membership group.
Awarded Points	Display the awarded points of the membership group.
Awarded Currency	Display the awarded currency of the membership group.
Redeem Points	Display the redeemed points by the membership group.
Redeem Currency	Display the redeemed currency by the membership group.
Expired Points	Display the expired points of the membership group.
Expired Currency	Display the expired currency of the membership group.
Active	Check to mark the membership group as active. Only active membership group would be awards points at POS to loyalty customer if loyalty member belong to membership group.
[Add Loyalty Customer]	Click for add loyalty customer to membership group.
[Remove Loyalty Customer]	Click to remove loyalty customer from membership group.
[OK]	This button saves the changes and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.

Loyalty Card

This screen allows user to add, edit and view the Loyalty customer from Loyalty system when registration method is set to loyalty card in loyalty setup.

To open the screen, choose *Operations > Loyalty > Loyalty Card.*

Search Screen

Field	Description/Activity
Search Criteria	
Id	Enter the Id of the loyalty customer to be searched.
Name	Enter the name of the loyalty customer to be searched.
Phone Number	Enter the phone number of the loyalty customer to be searched.
Address	Enter the address of the loyalty customer to be searched.
Active	Select one of the following scenarios: • **All** - To search for all the customers setup in the system. • **True** - To search for the customers with 'Active' option enabled. • **False** - To search for the customers with 'Active' option not enabled
Level Code	Specify the code of the level to be searched.
Membership Group	Select one of the following scenarios: • **All** - To search for all the loyaltymembers setup in the system. • **True** - To search for loyalty members assigned a membership group. • **False** - To search for the loyalty members which are not assigned any membership group.
Loyalty Program	Select the loyalty program of which data needs to be searched.
Search Results	
Loyalty Id	Displays the code of the customer(s) searched.
First Name	Displays the first name of the loyalty customer(s) searched.
Last Name	Displays the last name of the loyalty customer(s) searched.
Level	Displays the level of the loyalty customer(s) searched.
Mobile	Displays the mobile of the loyalty customer(s) searched.
Email	Displays the email of the loyalty customer(s) searched.
Birth Date	Displays the birth date of the loyalty customer(s) searched.

Setup Screen

Field	Description/Activity
Loyalty Program	Select the loyalty program.
Loyalty Id	Loyalty Id is an alphanumeric code used for loyalty customer identification. • If value for Card Management field in Loyalty Setup screen is set to user defined a unique code of a maximum 20 alphanumeric characters can be entered.

	• If value for Card Management field is set to Pre-printed then Loyalty Id is selected from the pop-up screen opened on click of OK button. • If value for Card Management field is set to Auto-Generated, then Loyalty Id is populated by default when user opens the Loyalty Card screen.
Salutation	Enter the salutation for the customer. A maximum of 50 alphanumeric characters can be entered.
Title	Enter the title for the customer. A maximum of 50 alphanumeric characters can be entered.
First Name	Enter the first name of the customer. A maximum of 100 alphanumeric characters can be entered. This name is displayed in the *Customer* section of the POS information panel.
Last Name	Enter the last name of the customer. A maximum of 40 alphanumeric characters can be entered.
Middle Name	Enter the middle name of the customer. A maximum of 50 alphanumeric characters can be entered.
Nick Name	Enter the nickname of the customer. A maximum of 50 alphanumeric characters can be entered.
Customer Group	Select a group from the list of customer groups. Click … to open the *Customer Group Search* screen.
Company Name	Enter customer's company name. A maximum of 50 alphanumeric characters can be entered. Company Name entered is displayed in the *Customer* section of the POS information panel.
Electronic Id	Enter the unique Electronic Id from the physical Loyalty Card. On swiping the Loyalty Card, system will recognize the customer and will populate the same at the time of transaction.
Gender	Enter the gender of the customer.
Date Of Birth	Enter the Date of Birth of the customer.
Anniversary Date	Enter the Anniversary Date of the customer.
Mobile Number	Enter the Anniversary Date of the customer.
Alternate Phone Number	Enter the Alternate Phone Number of the customer.
Fax Number	Enter the Fax Number of the customer.
Email	Enter the Email of the customer.
Web Page	Enter the Web Page of the customer.

Address1	Enter Address Line1.
Address2	Enter Address line 2.
Address3	Enter Address line 3.
City	Enter City of the customer.
State	Click [...] to enter this state of customer.
Country	Country gets auto populated.
Zip Code	Enter Zip Code
Active	Select this option mark the loyalty customer as active. Only active loyalty customers would be visible in customer search at POS by loyalty Id. By default, this option is enabled.
Enable Loyalty Notification	Select this checkbox to subscribe the customer for email/SMS notification on the registered email address or mobile number for loyalty events.
Enable Pass Notification	Select this option in case the customer would like to subscribe for a digital pass notifications generated from the iVend loyalty system. The digital loyalty pass is deliveredas a pass for the iOS and Android based systems. Any updates in the loyalty information of the customer is sent to customers digitally which updates these passes.
On Hold	Select this option if the user wants to put the loyalty customer on hold.
Referee Loyalty Id	Select the customer's name as a referee loyalty customer from the Loyalty Customer Search screen.
[Loyalty Points Information] Loyalty Points Information fields are not available while creating a new loyalty customer. When an existing loyalty customer is searched and opened in edit mode, these fields are displayed.	
Current Level	Display the current level of the loyalty customer.
Total Points Awarded	Display the total points awarded of the loyalty customer.
Total Currency Awarded	Display the total currency awarded of the loyalty customer.
Total Points Redeemed	Display the total points redeemed of the loyalty customer.
Total Currency Awarded	Display the total currency redeemed of the loyalty customer.
Available Points	Display the available points of the loyalty customer.
Available Currency	Display the available currency of the loyalty customer.

Available Redeemable Currency	Shows the redeemable currency against the loyalty points that customer has.
Total Expired Points	Display the total expired points of the loyalty customer.
Total Expired Currency	Display the total expired currency of the loyalty customer.

[OK]	This button saves the changes and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.
[Loyalty Points Details]	This button is inactive and grayed out while creating a loyalty customer. When an existing loyalty customer is searched and opened in edit mode, this button is active and opens Loyalty Points Detail screen on click.
Loyalty Points Details	
Transaction Date	Display the transaction date.
Business Date	Display the business date.
Store	Display the store Id.
Transaction Id	Display the transaction Id.
Points Awarded	Display the points awarded on the transaction.
Currency Awarded	Display the currency awarded on the transaction.
Points Redeemed	Display the redeemed points on the transaction.
Currency Redeemed	Display the redeemed currency on the transaction.
Expiry Date	Display the expiry date of the points/currency.
Expired	Display the status of the points either expired or not.
[Expiry Override]	This screen allows the store manager to override the expired points/currency of a loyalty customer so that the customer may redeem the points within the leased timeframe. This screen is available only if expiry override has been allowed in the system using the “Expiry Override” option in the loyalty setup.
Expiry Override	
Select	Select the points, which you want to override.
Store	Display the store Id.

Transaction Id	Display the transaction Id.
Award Date	Display the award date.
Points Awarded	Display the points awarded.
Currency Awarded	Display the currency awarded.
Expired On	Display the expiry date which points/currency expired.
Can Override	Shows the status that you can override points/currency or not.
New Expiry Date	Select a new expiry date for the transaction here.
[OK]	This button saves the changes and closes the point's expiry screen.
[Cancel]	This button does not save any changes and closes the point's expiry screen.

Loyalty Adjustment Journal

This screen allows user to adjust the loyalty points, currency and level loyalty customers.

To open the screen, choose *Operations > Loyalty > Loyalty Adjustment Journal*.

Search Screen

Field	Description/Activity
Search Criteria	
Adjustment Journal Number	Enter the Adjustment Journal Number of the adjustment journal to be searched.
Reference Number	Enter the reference number of the adjustment journal to be searched.
Search Results	
Adjustment Journal Number	Displays the adjustment journal number of the adjustment journal searched.
Reference Number	Displays the reference number of the adjustment journal(s) searched.
Loyalty Program	Select the loyalty program of which data needs to be searched.

Setup Screen

Field	Description/Activity
General	
Loyalty Program	Select the loyalty program.
Adjustment Journal Number	Adjustment Journal Number is auto generated from Adjustment Journal Series. Adjustment Journal Series is created from *Administration > System Initialization > Document Number Series* with Document Type as Loyalty Adjustment Journal.
Reference Number	Enter the reference number for the adjustment journal. A maximum of 50 alphanumeric characters can be entered.

Notes	Enter the comment for adjustment journal.
[Add Loyalty Customers]	Select loyalty customer for adjustment from Register Loyalty Customer Search screen, which opens on click of this button. Multiple loyalty customers can be selected.
[Remove Loyalty Customer]	Click to remove loyalty customer for adjustment.
[Import File]	Click to import excel file of loyalty customer for adjustment.
[OK]	This button saves the changes and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.
Adjustment Grid	
Loyalty Id	Display the loyalty id of the loyalty customer.
First Name	Display the first name of the loyalty customer.
Available Points	Display the available points of the loyalty customer.
Available Currency	Display the available currency of the loyalty customer.
Current Level	Display the current level of the loyalty customer.
Adjust Points	Enter Points to adjustment of loyalty Customer.
Adjust Currency	Enter currency to adjustment of loyalty Customer.
Adjust Level	Select new level to adjustment of loyalty Customer.
Comment	Enter Comment for adjustment.

Loyalty Card Transfer

Loyalty Card Transfer screen allows the store manager to transfer the points and currency balances from one or more Loyalty members to another existing Loyalty member. Once the transfer is done, the loyalty from which the points are transferred is marked as inactive in system.

To open the screen, choose *Operations > Loyalty > Loyalty Card Transfer*.

Search Screen

Field	Description/Activity
Search Criteria	
Reference Number	Enter the number of the Loyalty Card transferred to be searched.
Loyalty Id	Enter the Loyalty Id of the customer to be searched.
Loyalty Program	Select the loyalty program of which data needs to be searched.
Search Results	
Reference Number	Display the number of the Loyalty Card transferred.
Loyalty Id	Enter the Loyalty Id of the customer to be searched.

Setup Screen

Field	Description/Activity

Customer To	
Loyalty Program	Select the loyalty program.
Reference Number	Enter a card transfer number for the loyalty card transfer. A unique code of a maximum 20 alphanumeric characters can be entered.
First Name	Click [...] to select the customer from Loyalty Customer Search screen.
Loyalty Id	Display the loyalty id of selected loyalty customer.
Available Points	Display the available points of selected loyalty customer.
Available Currency	Display the available currency of selected loyalty customer.
Points After Transfer	Display the points of the selected customer when the transfer is processed.
Currency After Transfer	Displays the currency after transfer is processed.
Level Before Transfer	Displays the current Level of the selected customer.
Level After Transfer	Display the Level that the customer will attain after the transfer is processed.
Customer From	
Loyalty Id	Display the loyalty id of the loyalty customer. This is selected from the Loyalty Card Search screen, which open on click of [Customer From] button.
First Name	Display the first name of the loyalty customer.
Available Points	Display the available points of the loyalty customer.
Available Currency	Display the available currency of the loyalty customer.
[Customer From]	Click to add loyalty customer for Card Transfer.
[Delete Customer From]	Click to remove loyalty customer for Card Transfer.
[OK]	This button saves the changes and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.

Loyalty Pre-printed Cards

This screen is used to create preprinted loyalty card series.

To open the screen, choose *Operations > Loyalty > Preprinted loyalty Cards.*

Search Screen

Field	Description/Activity
Search Criteria	
Receipt Number	Enter the Receipt Number of the pre-printed loyalty card to be searched.
Search Results	
Receipt Date	Displays the date of the pre-printed loyalty card number generated.
Receipt Number	Displays Receipt Number of the pre-printed loyalty card searched.

Store	Displays the store name.

SETUP SCREEN

Field	Description/Activity
General	
Receipt Number	Enter a card receipt number for the loyalty preprinted card. A unique code of a maximum 20 alphanumeric characters can be entered.
Receipt Date	Enter the receipt date.
Store	Click [...] to enter store name.
Quantity	Enter the quantity of preprinted cards.
Comments	Enter the comments.
Loyalty Card Number	This field gets populated, based on how user creates loyalty card number using the buttons below.
Buttons	
[Add Card number]	Click to add preprinted card number. It Adds a field under Loyalty Card Number field, for user to enter the card number manually.
[Delete Card Number]	Click to remove the selected row under Loyalty Card Number column.
[Automatic Creation]	Click for automation creation of loyalty cards, which gets populated under Loyalty Card Number column.
[OK]	This button saves the changes and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.
Loyalty Card Automatic Generation	
General	The below fields are populated from “General” section of Printed loyalty Card screen.
Receipt Number	Displays a card receipt number for the loyalty preprinted card. A unique code of a maximum 20 alphanumeric characters can be entered.
Receipt Date	Enter the receipt date.
Remaining Quantity	Enter the quantity of preprinted cards to be generated.
Loyalty Card Automatic Generation Grid	
String	Enter the string for the preprinted series.
Type	Select the Type of the string. Valid values are: • String • Number
Operation	Select the operation for number type
Buttons	

[Add Row]	Click to add row for automatic generation.
[Delete Row]	Click to remove row for automatic generation.
[OK]	This button saves the changes and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.

Product

A product is defined for every item or service that is transacted at the POS. The transactions at POS can be started only when products have been setup in the system.

To open the screen, choose *Operations > Inventory > Product*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the product to be searched.
Description	Enter the description of the product to be searched.
UPC Code	Enter the UPC code of the product to be searched.
Product Group	Click [...] to select the product group of the product to be searched.
Category	Click [...] to select the category of the product to be searched.
Vendor Id	Click [...] to select the vendor id of the product to be searched.
Manufacturer Id	Click [...] to select the manufacturer idof the product to be searched.
Type	Select the Type of the product to be searched. Valid values are: • All • Child • Parent
Search Results	
Code	Displays the code of the product(s) searched.
Description	Displays the description of the product(s) searched.
Matrix Item	Indicator of whether the product is Matrix Parent item.
Product Group	Displays the product group to which the product belongs.
Saleable	Indicator of whether the product can be sold in any transaction at the POS.
Base Price	Displays the base price of the product searched.

Setup Screen

Field	Description/Activity

Code	Enter the unique code of the product.
Dashboard Icon	Click the Dashboard icon to view the Product Inventory dashboard screen. This icon is available on the Product Edit and Product View screen.
Accounting ID	This is a system generated unique key for each product, which helps in integration of the Vendor Code in iVend with the Item Code in SAP Business One.
Description, Short Description, Long Description	Enter the description for the Product. A text of maximum 100 alphanumeric characters can be entered for description and short description and of maximum 200 characters for long description.
Applicable Subsidiary	Allows selecting more than one subsidiary. Once assigned to a Subsidiary cannot be remove. It is visible if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Product Group	Select a group to which the product belongs from the list of product groups. Click … to open the Product Group Search screen and select the group. To add a new product group, press "F3" or click on "F3 New" button in the Product Group Search screen.
Product Class	Select a Product Class applicable for this product. Click [...] to open the *Product Class Search* screen and select the record. To add a new product class, press "F3" or click on [F3 New] in the *Product Class Search* screen. Please refer to Product Class before setting this.
UoM Group	Select a UoM group applicable for this product. Click [...] to open the UoM group search screen and select the record.
Base Price	Enter the unit price of the product. Base Price is used if the Price List is not defined in SAP Business One. This field is not visible, if subsidiary is enabled. It displays in "View Inventory" screen.
Vendor	Select a default vendor for the product from the list of vendors. Click … to open the Vendor Search screen and select the vendor. To add a new vendor, press "F3" or click on "F3 New" button in the Vendor Search screen. This field is not visible, if subsidiary is enabled. It displays in "View Inventory" screen.
Sales Tax Code	Select a tax from the list of tax codes. Click … to open the Tax Code Search screen and select the code. Separate tax codes for purchase and sales are required for countries like Australia and UK where input and output taxes are used. For other countries, the same tax code can be specified for both purchase and sale. This will not be shown in case Subsidiary is Turned ON in system.

Purchase Tax Code	Select a tax from the list of tax codes. Click … to open the Tax Code Search screen and select the code. This will not be shown in case Subsidiary is Turned ON in system.
Allow Fractional Quantity	Select this option for products that can be sold in fractions. For example, Weighed items would be sold in fractional quantity.
Discounts Allowed	Select this option to allow the user at the POS to give discounts on the sale of the product.
Price Override Allowed	If this flag is marked then the cashier would be able to change the price of the product while selling it to customer.
Has Up sells	This field is an indicator of whether the product has up sell products attached to it or not. This is a system updated field and cannot be updated by the user at Management Console. If up sell product(s) is defined for a product through the "Upsell Product" option in the system, this indicator gets selected automatically.
Has Alternate Products	This field is an indicator of whether the product has alternate products attached to it or not. This is a system-updated field and cannot be updated by the user at Management Console. If alternate product(s) is defined for a product through the "Alternate Product" option in the system, this indicator gets selected automatically.
Matrix Item	The field is an indicator of whether the product is marked as Parent Matrix Item in SAP Business One. The field is not editable and can be changed only from SAP Business One. Products created from iVend would be marked as non-matrix items.
2D Matrix Item	The field is an indicator of whether the product is marked as 2D Parent Matrix Item in SAP Business One. The field is not editable and can be changed only from SAP Business One. Products created from iVend would be marked as non 2D Matrix Items.
Matrix Child Item	The field is an indicator of whether the product is marked as child of matrix Item in SAP Business One. The field is not editable and can be changed only from SAP Business One. Products created from iVend would not be marked as child matrix items.
Batch Tracked	Select this option if the product is managed in batches. The field is not editable once the product is setup.
Serial Tracked	Select this option if the product is managed by serial numbers. The field is not editable once the product is setup.
Automatically Select Serial/Batch	Select this from the following available options:

	• **Manual** – System will not pick the batch/serial details automatically and therefore user must select it manually while selling the Serial/Batch controlled items on iVend POS. • **Expiry Date** – System will automatically select the batch/serials, which are expiring first. • **Lowest Price First** – System will pick the serial/batch based on the lowest price. • **Highest Price First** – System will pick the serial/batch based on the highest price. • **Creation Date** – System will pick the serial/batch based on the basis on their record creation date. • **Only if One Available** - System will select the serial/batch only if single serial/batch is available for sale in the system
Exchangeable	Select this option to enable the user at POS to perform 'Sales Exchange' transaction for the product.
Non Stock	Select this option if the product is a service for which stock cannot be maintained. The field is not editable once the product is setup.
Refundable	Select this option to enable the user at POS to perform 'Sale Refund' transaction for the product.
Saleable	Select this option if the product can be sold at the POS.
Weighed	Select this option if the product is weighed and sold at the POS.
Kit	Select this option to enable the product to be setup as a Kit. The field is not editable once the product is setup.
Assembly	Select this option to enable the product to be setup as an Assembly. The field is not editable once the product is setup.
Can Layaway	Select this option to enable the user at POS to layaway the product.
Can Order	Select this option to enable the user at POS to create a special order for the product.
On Hold	Select this option if the user wants to put the product on hold. Products on hold cannot be transacted at the POS. This field is not visible, if subsidiary is enabled. It displays in "View Inventory" screen.
Tax Exempt	Select this option to allow the product to be exempted from tax. This field is not visible, if subsidiary is enabled. It displays in "View Inventory" screen.
Inclusive Taxed	Select this option if the price of the product includes the taxes.

	This field is not visible, if subsidiary is enabled. It displays in "View Inventory" screen.
Default Quantity	Enter the quantity to be displayed at the POS when the product is selected for any transaction.
UPC Code	Enter the Universal Product Code (UPC) for the product. UPC is a type of bar code that is widely used in United States and Canada. If the entered UPC Code is already defined for some other product then user will be prompted for the confirmation of the same.
Require Age Verification	Select this option if the product can be sold only to people above a specified age. If this option is selected, the user at the POS will be prompted to enter the date of birth of the customer. If the age calculated from the date of birth is not greater than or equal to the minimum age specified, the system will not proceed with the transaction.
Min Age	This field is enabled only if the "Require Age Verification" is selected. Specify the minimum age required to purchase the product.
Manufacturer	Select a manufacturer for the product from the list of manufacturers. Click … to open the Manufacturer Search screen and select the manufacturer. To add a new manufacturer, press "F3" or click on "F3 New" button in the Manufacturer Search screen.
Open Price	Select this option to allow the user at POS to specify the price of the product during a sale. When this option is selected for a product, on adding this product to the sale, the system would display the "Sale Item Information" screen with the existing price of the product. The user can change the price, if required. This field is not visible, if subsidiary is enabled. It displays in "View Inventory" screen.
Open Description	Select this option to allow the user at POS to specify the description of the product during a sale. When this option is selected for a product, on adding this product to the sale, the system would display the "Sale Item Information" screen with the existing description of the product. The user can change the description, if required.
Zero Value	Select this option if you want to sell the product for free.
Lead Time	Enter the time required to deliver the product.
Barcode Mask	Select a bar code mask from the list of barcode masks. Click … to open the Barcode Mask Search screen and select the code.
Product Prices and Margin	The lookup will show all the pricelist present in the system. The price of the product can be edit in the pricelist, the product will be added automatically in the pricelist with the price as calculated on 'product Price and Margin' screen.
Image	
Image	Displays the image selected for the product.
[View Inventory]	This button allows the user to specify the warehouse wise tax codes and the lead time for the product delivery in the Inventory Item screen.

[Surcharges]	This button allows the user to specify the default surcharges that are to be applied on the item whenever it is added in transaction at Point of Sale.
[Sales Person]	This button allows to specify the default sales person for an item. Sales person per store for an item can also be set using this option.
[Product Attribute]	If the product is marked as Matrix Product, then clicking on this button will allow the user to launch the Product Attribute Selection screen for assigning the attributes to the product.
[Merchandise Hierarchy]	Click the button to add multiple Merchandise Hierarchies to the product. Click on Add Button to open the list of Merchandise Hierarchies defined in the system. Select the Hierarchy and the node at which the product is to be attached.
[View Child Inventory]	Click this button to see the inventory of child items of the selected product.
[Product Cost]	This button allows to set a specific price of the product for a specific date. This button will be enable only when Costing method is Standard Cost – Per Product.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Inventory Item View

Through this screen, the warehouse level tax codes and lead-time for the product can be specified.

Field	Description/Activity
Code	Displays the warehouse code.
Name	Displays the warehouse name.
Purchase Tax Code	Select a tax from the list of tax codes. Click[…] to open the Tax Code Search screen and select the code. Separate tax codes for purchase and sales are required for countries like Australia and UK where input and output taxes are used. For other countries, the same tax code can be specified for both purchase and sale.
Sales Tax Code	Select a tax from the list of tax codes. Click […] to open the Tax Code Search screen and select the code.
Price	Displays the price setup for the product.
Lead Time	By default displays the lead-time set up for the product. It enables the user to edit the lead-time for the particular warehouse.
In Stock Quantity	Displays the quantity of the product stocked in the warehouse. This includes the lay away stock and the quantity to be fulfilled.
On Order Quantity	Displays the quantity of the product, which is ordered from the vendor(s) for the specific warehouse.
On Fulfillment Quantity	Displays the quantity of the product, which is to be fulfilled from the warehouse.

Available Quantity	Displays the quantity of the product stored in the warehouse which is available for sale at the POS.
Cost Protection Margin Type	Select this value from following values: • **None** – Cost protection margin value will not be entered. • **Amount** – Cost protection margin value will be entered in amount. • **Percent** – Cost protection margin value will be entered in percentage.
Cost Protection Margin Value	Enter the cost protection margin value.
Inclusive Taxed	Select this option if the price of the product includes the taxes for a particular subsidiary. This field is visible, only if subsidiary is enabled.
On Hold	Select this option if the user wants to put the product on hold for a particular subsidiary. Products on hold cannot be transacted at the POS. This field is visible, if subsidiary is enabled.
Is Tax Exempt	Select this option to allow the product to be exempted from tax in a particular subsidiary. This field is visible, only if subsidiary is enabled
Maximum Open Price	Select this option to allow the user at POS to specify the price of the product during a sale. When this option is selected for a product, on adding this product to the sale, the system would display the "Sale Item Information" screen with the existing price of the product. The user can change the price, if required. This field is visible, only if subsidiary is enabled.
Prefered Vendor	Select a default vendor for the product from the list of vendors. Click … to open the Vendor Search screen and select the vendor. To add a new vendor, press "F3" or click on "F3 New" button in the Vendor Search screen. This field is visible, only if subsidiary is enabled.
PriceList	Select a price list from the list of price lists available for a subsidiary.
Last Modified	Displays the date and time when the information for the record was updated. This would show the user the inventory position at a warehouse as on the modified date time.
Serial Numbers	The button enables the user to search for the serial numbers of the serial tracked product in the particular warehouse. Select the row in the grid of the warehouse for which the serial numbers need to be searched and click the button to display the Serial Search screen.
Batch Numbers	The button enables the user to search for the batch numbers of the batch-tracked product in the particular warehouse.

	Select the row in the grid of the warehouse for which the batch numbers need to be searched and click the button to display the Batch Search screen.
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Location Wise Inventory

Through this screen, the location level availability of the product and its inventory can be shown.

These details will be available once location is enabled on enterprise and on the selected warehouse.

Field	Description/Activity
Location Id	Displays the location Id under the selected warehouse.
Location Description	Displays the Location description.
Available Quantity	Displays the available quantity for the product at that particular location.
Sale	Displays if the Location can be used as Sales Location for the product.
Refund	Displays if the Location can be used as Refund Location for the product.
Fulfillment	Displays if the Location can be used as Fulfillment Location for the product.
Goods Receive	Displays if the Location can be used for Goods Receiving for the product.
Goods Issue	Displays if the Location can be used as Goods Issue Location for the product.
Goods Return	Displays if the Location can be used as Goods Return Location for the product.
Stock Transfer	Displays if the Location can be used as Stock Transfer Location for the product.
Freeze	Displays if the Location is only for display purpose.

Product Cost

Cost of a product can be different for different days. This setup can be done at this screen.

This screen can be viewed only when Costing method of product is Standard Cost and Costing Sub-method is Per Product.

To open the screen, choose *Operations > Inventory > Product > Product Cost.*

Setup Screen

Field	Description/Activity
Id	Enter the code of the product group. A unique code of 20 alphanumeric characters can be entered.
Description	Enter the description of the product group. A description of maximum 100 alphanumeric characters can be entered.
Details	
Subsidiary	Allows selecting the subsidiary. Once assigned to a Subsidiary cannot be remove.

	It is visible if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Effective Date	By default, it shows the Current Date of the system and the product cost can be set for that particular date. User can change the cost for different dates by changing the effective date.
Cost	This field defines the current cost of the product for the selected effective date.
Buttons	
Add Row	The button adds new row in product cost definition grid so that you can define new detail.
Delete Row	The button deletes selected row in product cost definition grid.
Show Audit / Hide Audit	The button will show / hide the details of the product cost like created date, user etc. This button will be enable only when product cost screen is opened in View mode.
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Product Group

In order to setup a product, you need to setup a product group first. This feature is used to classify the products into groups. The user can create groups that correspond to the business areas and assign the products to the business area using the group. It can also describe the nature of the product. For example, for a furniture retailer, there can be Product Groups such as living room, kid's section and so on. A product can be a part of only one product group.

Product Groups can be used to group reports and to select all the products that belong to that group so that they can be processed together.

To open the screen, choose *Operations > Inventory > Product Group.*

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the product group to be searched.
Description	Enter the description of the product group(s) to be searched.
Search Results	
Code	Displays the code of the product group searched.
Description	Displays the description of the product group(s) searched.
Is Default	Display if the record is marked as default Product Group.

Setup Screen

Field	Description/Activity
Code	Enter the code of the product group. A unique code of 20 alphanumeric characters can be entered.
Description	Enter the description of the product group. A description of maximum 100 alphanumeric characters can be entered.
Is Default	If this flag is marked then the Product Group will be marked as the default Product Group. After this if any Product is created from iVend then by default the Product Group field will be populated by this Product Group; however user will have option to change it to other Product Group at the time of creation of new Product in system.
Discounts	Clicking this button would open a new screen Discounts setup for Product Group from where the user will be able to setup the date range based discounts for this product group.
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Product Class

Product Class aids in setting up the different tax conditions for the product. Products can be grouped together based on their tax and then can be put under a Product Class. System allows user to define a tax condition for this product class.

To open the screen, choose *Operations > Inventory > Product Class*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the product class to be searched.
Description	Enter the description of the product class to be searched.
Search Results	
Code	Displays the code of the product class searched.
Description	Displays the description of the product class searched.

Setup Screen

Field	Description/Activity
Code	Enter the code of the product class. A unique code of 20 alphanumeric characters can be entered.
Description	Enter the description of the product class. A description of maximum 100 alphanumeric characters can be entered.
[Ok]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Product Category

Product Category aids in categorizing products into groups that are designed according to consumer shopping behavior. Products within the same category can be substitutes for each other and at times complementary products can also be put in the same category.

This feature is for the reporting purposes. A product can be a part of multiple product categories.
To open the screen, choose *Operations > Inventory > Product Category.*

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the product category to be searched.
Description	Enter the description of the product category to be searched.
Search Results	
Code	Displays the code of the product category searched.
Description	Displays the description of the product category searched.

Setup Screen

Field	Description/Activity
Header Column	
Code	Enter the code of the product category. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the product category. A description of maximum 100 alphanumeric characters can be entered.
Detail Column	
Code	Displays the code of the product(s) that belong to the category.
Description	Displays the description of the product(s) added to the category.
Add Product	This button enables to add a product to the product category. Click the button to open the Product Search screen and select the product.
Delete Product	This button enables to delete the selected product from the product category.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Unit of Measure

Unit of Measure (UoM) is the criterion based on which you measure the quantity of the material.

To open the screen, choose *Operations > Inventory > Unit of Measure.*

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the UoM to be searched.
Description	Enter the description of the UoM to be searched.

Search Results	
Code	Displays the code of the UoM searched.
Description	Displays the description of the UoM searched.

Setup Screen

Field	Description/Activity
Header Columns	
Code	Enter the code of the UoM. A unique code of 20 alphanumeric characters can be entered.
Description	Enter the description of the UoM. A description of a maximum 100 alphanumeric characters can be entered.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Unit of Measure Group

A UoM (Unit of Measure) group is a set of UoMs that you want to use for a certain type of product. Each UoM group has a base UoM. All the other UoMs belonging to this group are related to this base UoM by conversion rules.

You can assign a UoM group to an item. When you use different UoMs for the item in sales, purchasing, inventory, and production transactions, iVend automatically processes the differences in UoMs according to their conversion rules.

To open the screen, choose *Operations > Inventory > Unit of Measure Group*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the UoM to be searched.
Description	Enter the description of the UoM to be searched.
Base UoM	Enter the Base UoM to be searched.
Search Results	
Code	Displays the code of the UoM searched.
Description	Displays the description of the UoM searched.
Base UoM	Displays the Base UoM of Unit of Measure Group(s) searched.

SETUP SCREEN

Field	Description/Activity
	Header Columns
Code	Enter the code of the Unit of Measure Group. A unique code of 20 alphanumeric characters can be entered.
Description	Enter the description of the Unit of Measure Group. A description of a maximum 100 alphanumeric characters can be entered.
Base UoM	Select a UoM applicable as a base for UoM group definition. Click [...] to open the base *UoM Search screen* and select the UoM.
	Group Details
UoM	Select alternate UoM as applicable. Click [...] to open *the UoM search screen* and select the UoM. In UoM group, definition the first row is auto generated with UoM same as selected base UoM.
Quantity	Default non-editable number is set 1 as alternate quantity.
Base UoM	Displays the base UoM set for the UoM Group.
Base Quantity	In the Base Quantity field, enter the values that match the conversion rate between the alternate UoM and the base UoM.
[Add Row]	The button adds new row in UoM group definition grid so that you can define new detail.
[Remove Row]	The button removes selected row(s) from UoM group definition.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

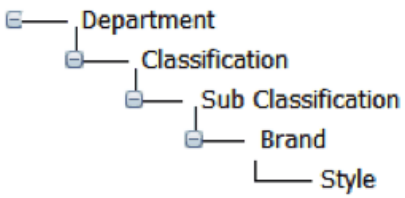
Merchandise Hierarchy

Every retail organization, regardless of its size, will have a merchandise reporting hierarchy. A Merchandise Hierarchy is a reporting structure under which sales and inventories of products are tracked and managed.

With the introduction of Merchandise Hierarchy, users can do the following:

- Define multiple Merchandise Hierarchies in the system.
- Attach more than one Merchandise Hierarchy to individual products.
- Top down reporting at all Merchandise Hierarchy levels.

Following is an example of a typical Merchandise Hierarchy:



To open the screen, choose *Operations > Inventory > Merchandise Hierarchy.*

Search Screen

Field	Description/Activity
Search Criteria	
Id	Enter the code of the Merchandise Hierarchy to be searched.
Description	Enter the description of the Merchandise Hierarchy to be searched.
Is Enabled	Select an option from the drop down to be searched
Search Results	
Id	Displays the code of the Merchandise Hierarchies searched.
Description	Displays the description of Merchandise Hierarchies searched.
Is Active	Indicate whether the Merchandise Hierarchy is active or not

Setup Screen

Field	Description/Activity
Header Columns	
Id	Enter the code of the Merchandise Hierarchy. A unique code of 20 alphanumeric characters can be entered.
Description	Enter the description of the Merchandise Hierarchy. A description of a maximum 100 alphanumeric characters can be entered.
Maximum Hierarchy Level	Enter the levels of the Merchandise Hierarchy. Merchandise Hierarchy of 15 levels can be setup.
Is Enabled	Check the field in order to make this Merchandise Hierarchy as active.
Attribute Details	
[Add Root Node]	This should be first node on the hierarchy. Click the button to add a root node and then enter the description for the added node.
[Add Child Node]	Adds the child node to the selected node. Once child node is added then enter the description of the newly added node.
[Delete Node]	Deletes the selected node along with it child node.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Once the merchandise hierarchy is defined, then this can be applied on the products. To see how it is done please refer to the product setup section.

Barcode Mask

This enables user to define bar code mask for the product, which can then be attached on the product. To open the screen, choose *Operations > Inventory > Bar code Masking.*

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the bar code mask to be searched.
Description	Enter the description of the bar code mask to be searched.
Mask Type	Select an option from the drop down to be searched. Valid values are: 1. Delimiter 2. Fixed Length
Search Results	
Code	Displays the code of the bar code mask searched.
Description	Displays the description of bar code mask searched.
Mask Type	Display the Bar code mask type.

Setup Screen

Field	Description/Activity
Header Columns	
Id	Enter the Id of the bar code mask. A unique code of 20 alphanumeric characters can be entered.
Description	Enter the description of the bar code mask. A description of a maximum 100 alphanumeric characters can be entered.
Start Sentinel	Enter the unique 2 character code which is used to identify the bar code when scanned on POS.
Mask Type	Select from the drop down field. Valid values are • **Delimiter**: Indicates that the bar code is made up of different components separated by a delimiter. • **Fixed Length**: Indicates that the bar code is made up of different components, which are of fixed length.
Length	Specify the total length of the bar code exclusive of the start sentinel. This setting is valid only in case the Mask Type is set to "Fixed Length".
Delimiter	Specify the delimiter character in case the bar code mask type is setup as "Delimiter".
Attribute Details	
Value Type	Select the value from the list of valid values: • **Product Id**: Signifies that the bar code contains the product id.

	• **Product Barcode**: Signifies that the bar code contains product UPC code.
	• **Serial or Batch**: Signifies that the bar code contains serial or batch number.
	• **UoM Bar Code**: Signifies that the bar code contains UoM based UPC code of the product.
	• **Price**: Signifies that the bar code contains the price of the product.
	• **Quantity**: Signifies that the bar code contains weight/quantity of the product.
	• **Skip_Characters:** Signifies that following section of the bar code must be skipped while resolving the bar code at POS.
	
	Rules
	
	• Except for the Skip_Characters none of the other values can repeat in the bar code mask.
	• First valid value of the bar code mask must be one of the following:
	  ○ Product Id
	  ○ Product Barcode
	  ○ UoM Bar Code

Length	Enter the length of the bar code component in case the bar code mask type is setup as "Fixed Length".
Factor	Enter the division factor to be applied on the values of price and quantity when resolved though the bar code. For example, if the scanned values is 1234 for the price and the factor is 100 then the price at the POS will be calculated as 1234/100 = $12.34.
[Add Row]	Adds the detail row.
[Delete Row]	Deleted the selected detail row(s).
[Up]	Moves the selected row, Up in the order.
[Down]	Moves the selected row, Down in the order.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Package

This feature enables to define the package. Package can be attached to a product. Package acts as a tare weight while selling the weighted items at POS.

To open the screen, choose *Operations > Inventory> Package*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code to be searched.
Description	Enter the package description to be searched
Result	
Code	Displays the package code based on the search criteria.
Description	Displays the package description based on the search criteria.
Weight	Displays the package weight based on the search criteria.

Setup Screen

Field	Description/Activity
General	
Id	Specify the Id of the Package.
Description	Specify the Description of the Package.
Weight	Enter the default weight of the package being defined.
Button	
OK	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Package Group

This feature enables to define the packages in a package group. Package groups can then be attached to a product. User can select the package from the package group while selling the items at POS.

To open the screen, choose *Operations > Inventory> Package Group*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code to be searched.
Description	Enter the package group description to be searched.
Result	
Code	Displays the package code based on the search criteria.
Description	Displays the package description based on the search criteria.

SETUP SCREEN

Field	Description/Activity
General	
Id	Specify the Id of the Package group.
Description	Specify the Description of the Package group.
Details	
Package	Displays the package code, which is part of this package group.
Description	Displays the package description, which is part of this package group.
Weight	Displays the weight of the package.
Is Default	Check this flag if the package is default package of this package group.
Button	
Add Package	Adds a new package row in the details section.
Delete Package	Deletes the selected record from the details section.
OK	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Alternate Product

At times, it happens that customers want a particular item and that item is out of stock at the Store. In such cases, the user at the POS can suggest alternate products that the customer can buy if there are alternate products associated to the product.

Alternate product(s) can be associated to a product at the Management Console using this option. These products are displayed at the POS when no stock is available for a product at the store.

To open the screen, choose *Operations > Inventory > Alternate Product* Choose a product for which alternate products have to be setup.

SETUP SCREEN

Field	Description/Activity
Header Column	
Code	Displays the code of the product for which alternate product(s) is being specified.
Description	Displays the description of the product for which alternate product(s) is being specified.
Detail Column	
Code	Displays the code of the alternate product(s) being associated to a product.
Description	Displays the description of the alternate product(s).
Match Factor	Enter the % of matching between the alternate product and the product to which it is being associated.
Add Product	This button enables to add a product as an alternate product. Click the button to open the Product Search screen and select the product.

Delete Product	This button enables to delete the selected alternate.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Alternate UPC Code

The retailers come across a situation where a single item has multiple barcodes. Each vendor uses his own barcode for the item, thus there are several barcodes for a single item. The 'Alternate UPC Code' (Universal Product Code) feature enables to define multiple barcodes for a single item.

To open the screen, choose *Operations > Inventory > Alternate UPC Code* Select the product for which the UPC codes are being defined.

Setup Screen

Field	Description/Activity
Header Columns	
Code	Displays the code of the product for which UPC code is being added.
Description	Displays the description of the product for which UPC code is being added.
Detail Columns	
UPC Code	Displays the barcode added to the product.
Quantity	Default quantity of the product if scanned.
Add UPC Code	This button enables to add a UPC code to the product. Click the button to add a row in the detail column where user can enter the UPC code.
Delete UPC Code	The button enables to delete the selected UPC code.
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Upsell Product

Upselling is suggesting additional products to the original purchase, often an accessory or a higher model of the product with more features.

In iVend, the user can define one or more upsell products to a product. At the POS, every time the user sells a product with upsell products associated with it, a popup would display the upsell products that the user can suggest to the customer.

To open the screen, choose *Operations > Inventory > Upsell Products* Choose the product for which upsell products need to be defined

Setup Screen

Field	Description/Activity
Header Column	
Code	Displays the code of the product for which upsell product(s) is being defined.

Description	Displays the description of the product for which upsell product(s) is being defined.
Detail Column	
Code	Displays the code of the product for which upsell product(s) is being defined.
Description	Displays the description of the product for which upsell product(s) is being defined.
Add Product	This button enables to add a product as an upsell product. Click the button to open the Product Search screen and select the product.
Delete Product	This button enables to delete the selected product added as an up sell product.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Kit Setup

This feature enables to create, manage, break down and build up kits at the management console. Kits are stored in inventory and are available for sale only after their creation. When a kit is built or broken down the components are subtracted/added from the inventory. The components of a kit have their own inventory and can be sold separately. Only products with 'Is Kit' checkbox enabled in the Product Screen can be setup as Kit.

To open the screen, choose *Operations > Inventory > Kit Setup* Choose the product for which components have to be defined.

Setup Screen

Field	Description/Activity
Header Column	
Code	Displays the code of the product being setup as kit.
Description	Displays the description of the product being setup as kit.
Detail Column	
Code	Displays the code of the component being added to the kit.
Description	Displays the description of the component being added to the kit.
Quantity	Enter the quantity of the component that needs to be added to the kit.
Add Product	This button enables to add a product as a component of the kit. Click the button to open the Product Search screen and select the product.
Delete Product	This button enables to delete the selected component.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Assembly Details

This feature enables to create and manage assemblies at the management console. Unlike kits, the components of an assembly do not have inventory of their own and cannot be sold separately. Only products with 'Is Assembly' checkbox enabled in the Product Screen can be setup as Assembly.

To open the screen, choose *Operations > Inventory > Assembly Details* Choose the product for which the components have to be defined.

Setup Screen

Field	Description/Activity
Header Column	
Code	Displays the code of the product being setup as assembly.
Description	Displays the description of the product being setup as assembly.
Detail Column	
Code	Displays the code of the product being added as a component of the assembly.
Description	Displays the description of the product being added as a component of the assembly.
Quantity	Enter the quantity of the component required to complete the assembly.
Add Product	This button enables to add a component to the assembly. Click the button to open the Product Search screen and select the product.
Delete Product	This button enables to delete the selected component from the assembly.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Manufacturer

This feature allows to setup manufacturers of products. Only one manufacturer can be assigned to a product in the Product screen.

To open the screen, choose *Operations > Inventory > Manufacturer.*

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the manufacturer to be searched.
Name	Enter the name of the manufacturer(s) to be searched.
Search Results	
Code	Displays the code of the manufacturer(s) searched.
Name	Displays the name of the manufacturer(s) searched.

Setup Screen

Field	Description/Activity
Code	Enter the code of the manufacturer A unique code of maximum 20 alphanumeric characters can be entered.
Name	Enter the name of the manufacturer. A name of maximum 100 alphanumeric characters can be entered.

Discounts	Clicking this button would open a new screen Discounts setup for Manufacturer from where the user will be able to setup the date range based discounts for this manufacturer.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Shipping Type

This screen enables the user to define how orders can be shipped.
To open the screen, choose *Operations > Inventory > Shipping Type*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the shipping type to be searched.
Description	Enter the description of the shipping type(s) to be searched.
Search Results	
Code	Displays the code of the shipping type(s) searched.
Description	Displays the description of the shipping type(s) searched.
Web Page	Displays the web page of the shipping type searched.

Setup Screen

Field	Description/Activity
Code	Enter the code of the shipping type. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the shipping type. A description of maximum 100 alphanumeric characters can be entered.
Web Page	Enter the webpage of the shipping type.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Fulfillment Plan

This feature enables the user to search for the fulfillment plans setup in the system and set up new fulfillment plans. The fulfillment plan contains information regarding the lead-time required for delivery, the inventory allocation method and the surcharges to be added to the transaction amount when the specified fulfillment plan is attached.

To open the screen, choose *Operations > Inventory > Fulfillment Plan*.

Search Screen

Field	Description/Activity
Search Criteria	

Code	Enter the code of the fulfillment plan to be searched.
Description	Enter the description of the fulfillment plan to be searched.
Search Results	
Code	Displays the code of the fulfillment plan searched.
Description	Displays the description of the fulfillment plan searched.
Required Address	Indicator of whether the address of the customer is required or not when the plan is attached to a sale/ special order transaction.
Inventory Allocation Method	Displays the method of inventory allocation for the plan.
Min Lead Time	Displays the minimum lead-time for delivery of the products specified for the fulfillment plan.
Subsidiary	Displays the Subsidiary of the fulfillment plan searched. This is field is visible if subsidiary is enabled.

SETUP SCREEN

Field	Description/Activity
Header Columns	
Code	Enter the code for the fulfillment plan. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the fulfillment plan. A description of maximum 100 alphanumeric characters can be entered.
Require Address	Select this option if the address of the customer is mandatory when the plan is attached to a sale/ special order transaction. The address is required for delivering the goods at the customer's place.
Inventory Allocation Method	Select one of the methods to allocate inventory: • **Sale** - The inventory of the product is affected immediately. A fulfillment plan with this inventory allocation method can be attached only to sales transactions. • **Delivery -** The inventory of the product is affected only after the order is delivered to the customer. By default, this option is selected. A fulfillment plan with this inventory allocation method can be attached only to special order transactions.
Min Lead Time	Enter the minimum time required to deliver the order. The value displayed by default is 0.
Subsidiary	Select a Subsidiary to which the fulfillment plan belongs from the list of Subsidiary(s). Click [...] to open the Subsidiary Search screen and select the Subsidiary. This is field is visible if subsidiary is enabled.

Details Columns	
Surcharge Id	Displays the code of the surcharge added.
Description	Displays the description of the surcharge added.
Amount Type	Indicator whether the surcharge is calculated as percentage of the transaction amount or as a fixed amount.
Amount	Displays the amount of surcharge (fixed amount or percentage).
Pay In Advance	Select this option if the user wants the surcharge amount to be paid in advance when a transaction with this plan attached is carried at the POS.
Add Surcharge	The button enables to add a surcharge. Select a surcharge from the list of surcharges. Click the button to open the Surcharge Search screen and select the surcharge. To add a new surcharge, press "F3" or click on "F3 New" button in the Surcharge Search screen.
Delete Surcharge	The button enables to delete the selected surcharge.
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Layaway Plan

Layaway is a system where the customer gives the store a deposit on product(s), which is held until a later date when the customer completes payment in full or through installments. In iVend, in order to layaway a product from POS, a layaway plan needs to be setup first.

This feature enables the user to setup layaway plans that can be attached to the products. The default number of installments and the installment amount to be paid and the period over which the installments need to be distributed is calculated based on the layaway plan attached to the product.

To open the screen, choose *Operations > Inventory > Layaway Plan*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the layaway plan to be searched.
Description	Enter the description of the layaway plan(s) to be searched.
Search Results	
Code	Displays the code of the layaway plan(s) searched.
Description	Displays the description of the layaway plan(s) searched.
Active	Indicator of whether the promotion is active or not.
Subsidiary	Displays the Subsidiary of the layaway plan searched. (If Subsidiary is enabled).

SETUP SCREEN

Field	Description/Activity
Header Column	
Code	Enter the code for the layaway plan. A numeric value needs to be entered as the code.
Description	Enter the description for the layaway plan. A description of maximum 100 alphanumeric characters can be entered.
Active	Select this option to make the layaway plan available to be applied on layaway transactions.
Installment Count	Enter the default installment count to be applied on the transaction.
Min Installment Count	Enter the minimum number of installments required in the plan. The user at the POS cannot enter an installment count lesser than the number specified here.
Max Installment Count	Enter the maximum number of installments that can be specified in the plan. The user at the POS cannot enter an installment count more than the number specified here.
Duration Type	Specify the periodicity of the installments from the following available values: • Weekly • Monthly • Quarterly • Half Yearly • Yearly • Duration
Installment Duration	This field is enabled only if the “Duration Type” specified is “Duration”. Enter the number of days after which the layaway installment becomes due from the customer.
First Installment Due(In Days)	Enter the number of days from the date of transaction when the first installment would be due.
Inventory Allocation Method	Specify whether the inventory would get affected immediately on sale or on the delivery of the product after full payment is received from the customer.
Deposit Type	Specify if the deposit to be taken from the customer will be a percentage of the product price or a fixed amount.
Deposit	Enter the fixed amount or the percentage of the product price to be taken from the customer as deposit depending on the “deposit type” selected.
Subsidiary	Select a Subsidiary to which the layaway plan belongs from the list of Subsidiaries. Click [...] to open the Subsidiary Search screen and select the Subsidiary.
Detail Column	
Product	Displays the code and description of the product to which the layaway plan is applied by default. The user at POS can however change the layaway plan if required.
Installment Count	Enter the installment count to be applied on the layaway transaction for the product. If left blank, the value specified at the header level is picked.

Deposit Type	Specify if the deposit to be taken from the customer will be a percentage of the product price or a fixed amount. If left blank, the value specified at the header level is picked.
Deposit	Enter the fixed amount or the percentage of the product price to be taken from the customer as deposit depending on the "deposit type" selected. If left blank, the value specified at the header level is picked.
Add Product	The button enables to add a product to the layaway plan. Click the button to display the "Product Search" Screen and select the product. The products with "Can Layaway" option enabled in the "Product" Screen can only be added to the Layaway Plan(s).
Delete Product	The button enables to delete the product added to the layaway plan. To delete a product, the user selects the row of the product to be deleted and clicks the button.
Surcharge	The button enables the user to attach a surcharge or delete the surcharge added to the layaway plan. The Surcharge Screen is displayed on clicking the button.
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Item Printing

The Item Printing helps in printing the text on the receipt defined in the system. Store manager can setup additional information to be printed on receipt for a particular product or product group.

To open the screen, choose *Operations > Inventory > Item Printing*.

Setup Screen

Field	Description/Activity
Header Columns	
Code	Enter the code for the printing. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the printing. A description of maximum 100 alphanumeric characters can be entered.
Print Information	Enter the text that is to be printed on receipt.
Source Type	Select the source on which this has to be applied. The valid values are • Product • Product Group
Source	Select the source based on the Source Type selected.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Inventory Cycle

The Inventory Cycle helps in defining the inventory counting periods. Once defined these periods can be attached to the products.

Based on the inventory cycle attached to the products, system determines the products for which the inventory counting is overdue and the same is shown in the inventory-counting screen.

To open the screen, choose *Operations > Inventory > Item Cycle*.

Setup Screen

Field	Description/Activity
Header Columns	
Id	Enter the unique code for the inventory cycle. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description for the inventory cycle. A description of maximum 100 alphanumeric characters can be entered.
Frequency	Select the value from the available list. • Daily • Weekly • After Every Days • Monthly • Quarterly • Half Yearly • Annually • One Time
Counting Day	Enter the day of the month on which the inventory is to be counted.
Next Count Date	Display the next counting date based on the above selected settings.
Next Count Time	Display the next counting time based on the above selected settings.
Buttons	
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Inventory Revaluation

Use this window to define which items you want to revaluate and how.

This setup is only available in iVend Unplugged.

To open the screen, choose *Operations > Inventory > Inventory Revaluation.*

SEARCH SCREEN

Field	Description/Activity
Search Criteria	
Id	Enter the unique code to be searched.
Description	Enter the Inventory evaluations done in past to be searched.
Result	
Code	Displays the inventory evaluation.
Description	Displays the description of the inventory revaluation.
Subsidiary	Select a Subsidiary to which the item belongs from the list of Subsidiaries. Click [...] to open the Subsidiary Search screen and select the Subsidiary. This is field is visible only if subsidiary is enabled.
Created By	Displays the user name who did the inventory revaluation.
Created Date	Displays the inventory revaluation date.

SETUP SCREEN

Product	Select the product for which the cost is to be updated. Only products with costing method as weighted average can be selected.
Warehouse	Select the warehouse for which the cost is to be updated. Warehouse can only be selected for the products which has sub costing method as "Per Warehouse"
In Stock Quantity	Display the In-Stock quantity of the product in the current warehouse.
Available Quantity	Display the Available quantity of the product in the current warehouse.
Current Cost	Display the current weighted average cost of an item.
Updated Cost	Enter the updated item cost
Reason	Select the reason for reevaluating the items.
Comment	Captures the comments.

Button	
[OK]	This button updates changes to the database and closes the screen.
[Cancel]	This button does not save any changes and closes the screen.

Price List

The price lists are setup in SAP Business One and are replicated to iVend Retail database. The price list details can only be viewed in iVend and cannot be edited.

To open the screen, choose *Operations > Pricing and Promotion> Price List*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the price list to be searched.
Description	Specify the description of the price list to be searched.
Search Results	
Code	Displays the code of the price list(s) searched.
Price List Name	Displays the name of the price list(s) searched.
Subsidiary	Displays the Subsidiary of the Price List searched.(If Subsidiary is enabled)

Price List View Screen

Field	Description/Activity
Code	Displays the code of the price list.
Name	Displays the name of the price list.
Applicable Subsidiary	Select a Subsidiary to which the Price List belongs from the list of Subsidiary(s). Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field is visible, if subsidiary is enabled.
Currency	Displays the currency respective of selected subsidiary. It also allows selecting currency other than the base currency if subsidiary is disabled. This field is visible, if subsidiary is enabled.

Special Price List

The special price lists setup in SAP Business One and its details can be only viewed in iVend. Special Prices are defined either for the business partners or for the price lists. Further special prices can be applied for a particular period of time and/or a specified quantity of the product.

To open the screen, choose *Operations > Pricing and Promotion > Special Price. List*.

Data View Screen

Field	Description/Activity
Customer Code	Displays the code of the customer for whom the special price list is defined.
Customer First Name	Displays the first name of the customer for whom the special price list is defined.
Price List Code	Displays the code of the price list for which the special price list is defined.
Price List Name	Displays the name of the price list for which the special list is defined.
Subsidiary	Displays the Subsidiary of the Special Price List searched.(If Subsidiary is enabled)
OK	The button enables to open the 'Special Price List Master' screen. Select a row in the grid for which the 'Special Price List Master' screen is to be opened and click on the Ok button.
Cancel	The button closes the screen.

Data Setup Screen

Field	Description/Activity
Subsidiary	Select a Subsidiary to which the Special Price List belongs from the list of Subsidiary(s). Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field is visible, if subsidiary is enabled.
Pricing Type	Select the Pricing Type for the Special Price List. The valid values are: • Based on Customer • Based on Price List
Customer/Price List	Select the customer / price list to which this Special Price List belongs. Click [...] to open the respective search screen and select the value.
Base Price List	Select the base price list for this special price list. Click [...] to open the price list search screen and select the price list. Product addition panel will be enable once user will select the base price list.
Buttons	
[Add Product]	Allows the user to add the product(s) for which this special price list will be applicable.
[Delete Product]	Allows the user to delete the added product(s).
[Add Date]	Allows the user to add date based pricing of the product.
[Delete Date]	Allows the user to delete date based pricing of the product.
[Add Quantity]	Allows the user to add quantity based pricing of the product.

[Delete Quantity]	Allows the user to delete quantity based pricing of the product.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.
Add Product Details	
Product	Select the product(s) for this special price list.
Price	This field shows the current price of the product. This field is non-editable.
Discount Type	Displays if the discount is calculated based on amount or percentage. The valid values are- • None • Amount • Percent
Discount	Displays the discount value in amount/ percentage as per the type specified.
Add Date Details	
From Date	Enter the date from which the special price list is to be applied.
To Date	Enter the date till which the special price list is to be applied.
Price	This field shows the current price of the product. This field is non-editable.
Discount Type	Displays if the discount is calculated based on amount or percentage.
Discount	Displays the discount value in amount/ percentage as per the type specified.
Add Quantity Details	
UoM	Search and select the UOM group.
Quantity	Enter the quantity of the product for the quantity-based pricing.
Price	Enter the price of the product for the quantity-based pricing.
Discount Type	Displays if the discount is calculated based on amount or percentage.
Discount	Displays the discount value in amount/ percentage as per the type specified.

Group Discounts

The details of the discount group setup in SAP Business One are displayed in this screen.
To open the screen, choose *Operations > Pricing and Promotion > Group Discounts*.

Data View Screen

Field	Description/Activity
Customer Code	Displays the code of the customer for whom the group discount is defined.
First Name	Displays the first name of the customer for whom the group discount is defined.
Product Group	Displays the product group for which the group discount has been specified.

Manufacturer Code	Displays the code of the manufacturer for which the group discount has been specified.
Manufacturer Name	Displays the name of the manufacturer for which the group discount has been specified.
Discount Type	Displays if the discount is calculated based on amount or percentage.
Discount	Displays the discount value in amount/ percentage as per the type specified.
Cancel	This button closes the screen.

Bonus Buys

Bonus Buys is the promotion engine of iVend created to set promotion scenarios, where certain prerequisites have been specified. In Bonus Buys, this is achieved using BUY and GET condition(s). In the BUY side prerequisites are mentioned, the GET side consists of the discount condition.

The prerequisite(s) in the BUY side include:

- Minimum total purchase.
- One or more product(s)/product group(s) with quantity qualification.

Note: The user can flag whether all the prerequisites are to be fulfilled (Is Mandatory) or only one of the condition needs to be fulfilled.

GET side condition(s) include:

- Discount valid on a single product.
- Discount valid on group of products.
- Discount valid on a specific product category.
- Discount valid on a gift card/coupon.

To open the screen, choose *Operations > Pricing and Promotion > Bonus Buys*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the promotion to be searched.
Description	Enter the description of the promotion(s) to be searched.
Search Results	
Code	Displays the code of the promotion searched.
Description	Displays the description of the promotion searched.
Active	Displays if the promotion is active.
Subsidiary	Displays the Subsidiary of the Bonus Buys searched.(If Subsidiary is enabled)

Data Setup Screen

Field	Description/Activity
Code	Enter the code for the Bonus Buys promotion. A unique code of a maximum 20 alphanumeric characters can be entered.

Description	Enter the description for the promotion. A description of maximum 100 alphanumeric characters can be entered.
Applicable Subsidiary	Select a Subsidiary to which the Bonus Buys belongs from the list of Subsidiaries. Click [...] to open the Subsidiary Search screen and select the Subsidiary. It is visible if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Active	Select this option to enable the promotion to be active.
Has Effective Date	Select this option if the promotion is available for limited period.
From Date	The field is enabled only if the Has Effective Date option is selected. Enter the date from which the promotion starts. To select click ▼ to open the calendar control and select the date.
To Date	The field is enabled only if the Has Effective Date option is selected. Enter the date on which the promotion will end. To select click ▼ to open the calendar control and select the date.
Has Effective Time	The field stores whether the promotion has been defined to Dates as well as specific time slots. For Example: Happy Hours
From Time	The field is enabled only if the Has Effective Time option is selected. Enter the time from which the promotion starts.
To Time	The field is enabled only if the Has Effective Time option is selected. Enter the time to which the promotion starts.
Minimum Bill Amount	Enter the total minimum bill amount for promotion applicability at Point Of Sale.
Minimum Quantity	Enter the minimum quantity of product(s) required to trigger the promotion at Point Of Sale.
Discount Type	Enter the Discount Type in Amount or Percentage.
Discount	Enter the discount offered (in amount or percentage) at sale level. This is applicable when the Buy and Get conditions are not set for the promotion.
Maximum Redemption Count Per Store	Enter the number of times this promotion can be applied in a particular store. Promotion count can be specified on the Bonus Buys setup so that you can limit the number of times a promotion is triggered on a particular store. For example, you can now configure a promotion so that it applies only for the first 5 consumers.
Can Repeat in Transaction	Set this option in case you would like to system to repeat the promotion with in the same transaction.
Lowest value	Check this flag to discount the lowest value item in a transaction where promotion has been applied. This field is checked by default.

Exclude Discounted Items	Check this flag if user wants to exclude already discounted items from promotion applicability.
Apply on Item Scan	Set this option in case you would like the promotion discounts to be applied on the item scan. In case you would like to first scan all items and then want system to apply the promotion on the transaction, then the flag must be turned OFF.
Promotion Color	Items on which the promotion is applied on POS will be highlighted in color based on this setting.
Apply Once for Customer	Set this option in case you would like to give the promotion only once for a customer. Seleting this option would ensure that the same customer would not get the same promotion more than once.
[Setup]	The button enables the user to setup the promotion rules. Click on this button to open the Promotion Setup screen.
[Applicability]	The button enables to add the store(s) in which the user wants to run the promotion being setup. Click on this button to open the Store screen and define the stores. The user can also specify the loyalty levels for which the promotion is applicable. Setting a loyalty level would ensure that the promotion is applied only to the loyalty customers which fall in the selected loyalty levels. The promotion can also be setup for the special days of the customer such as birthdays and for anniversary. If the dates are defined then the promotion will only be applicable in case the customer birthday or anniversary falls in the specified dates/day range.
[Exclusion List]	Click on the Exclusion List button to specify any condition(s) for which the promotion setup will not be applicable. Specific Product(s), Product group(s), Customer Group(s), Product Category can be exempted off the promotion on being listed in the Promotion Exclusion List.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Bonus Buys Hierarchy

This screen helps user in setting up the hierarchy of the promotions if multiple Bonus Buys promotion(s) are defined in the system

To open the screen, choose *Operations > Pricing and Promotion>Bonus Buys Hierarchy*

Setup Screen

Field	Description/Activity
Header Column	
[Up]	Moves the selected record Up in the promotion hierarchy.
[Down]	Moves the selected record Down in the promotion hierarchy.

[First]	Moves the selected record on Top in the promotion hierarchy.
[Last]	Moves the selected record at Last position in the promotion hierarchy.
[OK]	Clicking on this button updates changes to the database and closes the screen.
[Cancel]	Clicking on this button does not save any changes and closes the screen.

Coupon

Coupons are vouchers entitling the holder to a discount off a particular product(s). It is a promotional tool that can be used to get discounts while purchasing goods or services. Generally, coupons are classified into Manufactured and Store issued coupons, however, in iVend, treatment for both of these coupon types remains same and depends on the coupon setup.

To open the screen, choose *Operations > Pricing and Promotion > Coupon*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the coupon to be searched.
Description	Enter the description of the coupon(s) to be searched.
Search Results	
Code	Displays the code of the coupon searched.
Description	Displays the description of the coupon searched.
Subsidiary	Displays the Subsidiary of the coupon searched.(If Subsidiary is enabled)

Setup Screen

Field	Description/Activity
Header Column	
Code	Enter the coupon Id. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the coupon.
Applicable Subsidiary	Select a Subsidiary to which the coupon belongs from the list of Subsidiaries. Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field will be available if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
UPC Code	Enter the Universal Product Code (UPC) for the Coupon (if any). UPC is a type of bar code.
Start Date	Enter the validity start date of the coupon. Click ▼ to open the calendar control and select the date. **Note**: The default value for this field is current date.

End Date	Enter the validity end date of the coupon. Click ▼ to open the calendar control and select the date.
Trigger Multiple Times	Check this flag if this coupon can be redeemed more than once in a same transaction at the POS. By default, it remains checked.
Minimum Order Value	Enter minimum Transaction amount required for coupon to be applicable at POS.
Redemption Number Per Store	Enter the number of times the coupon can be redeemed in a particular store.
Redemption Once Per Customer	If this flag is checked then coupon can be redeemed only once by each customer.
Trigger Quantity	Trigger Quantity is the number of product(s) meeting criteria that are required for the coupon to be applicable at Point of Sale. By default, Trigger Quantity is set to 1.
Applicable Quantity	Applicable Quantity is the number of product(s) on which the coupon discount would be applied at the POS.
Discount Type	Select a Discount Type for the Coupon. Discount can be given in Percentage or in Amount.
Discount	Depending on the Discount Type selected, enter the Discount in amount or percentage.
Can Issue at POS	Check the flag if this coupon can also be issued at Point Of Sale.
Can Print at POS	Check the flag if this coupon can be printed at Point Of Sale.
Buttons	
[Add Product]	Allows the user to add the product(s) for which this coupon will be applicable.
[Add Product Group]	The entire product group for which this coupon will be applicable.
[Add Product Category]	Allows the user to add the Product Category for which the coupon will be applicable.
[Add Manufacturer]	Allows the user to add specific manufacturer for which the coupon will be valid.
[Add Customer Group]	Allows the user to add a particular Customer Group(s) for coupon this coupon is valid.
[Delete Conditions]	Allows the user to delete any specific condition(s) set for the coupon.
[Applicable]	The button allows the user to select the store(s) applicability for the coupon.
[OK]	This button updates changes to the database and closes the screen.
[Cancel]	Closes the screen without saving the changes.

Product Gross Margin

Use this feature to manage product's prices in the price list that are calculated based on product cost, margin, markup and coefficient.

To open the screen, choose *Operations > Pricing and Promotions > Product Gross Margin*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the 'Product Gross Margin' to be searched.
Description	Enter the description of the saved 'Product Gross Margin' to be searched.
Price List	Select or enter the price list code to search the saved 'Product Gross Margin'.
Search Results	
Code	Displays the code of the 'Product Gross Margin' searched.
Description	Displays the description of the 'Product Gross Margin' searched.
Price List Name	Displays the price list name of the price list of the 'Product Gross Margin' searched.

Data Setup Screen

Field	Description/Activity
Header Columns	
Code	Enter the code of the Product Gross Margin. A unique code of a maximum of 20 alphanumeric characters can be entered.
Description	Enter the description of the Product Gross Margin. A description of a maximum of 100 alphanumeric characters can be entered.
Subsidiary	Select a subsidiary, the price list that will be modified will belong to this subsidiary only. This menu will be available once subsidiary is enabled on enterprise.
Price List	Select a price list from the list of price lists where you want to change the prices of products. This is the target price list.
Rounding Option	Select the rounding option for the prices. This will be applied to the suggested (rounded) price. • RoundTo • EndsWith
Rounding Type	Select the rounding type for the prices. This will be applied to the suggested (rounded) price. • RoundDown • RoundUp • RoundToNearest

Rounding	This is the factor(less than 1) based on which the rounded suggested price will be calculated.
Show Price Changed Rows	Enabling this check box will show the rows that have been updated.
Draft Mode	Enabling this mode will give the advantage of saving the pricelist temporarily. That means no changes will be made in the target pricelist. To make the changes in the pricelist permanent, this draft mode has to be unselected.
Detail Columns	
Select	Select the products for which the prices have to be updated.
Product Id	Displays the code of the product(s) in the price list.
Product Description	Displays the description of the product(s) in the price list.
UOM	Displays the UOM of the product(s).
Product Group	Displays the product group of the product(s) in the price list.
Parent Product	Displays the code of the parent product of the product in the price list.
Current Cost	Displays the cost of the product initially.
What If Cost	Displays initially the cost of the product(s) in the price list, the user can change the value and the calculation will be done according to this price, calculated price will then be shown under suggested price.
Current Price	Displays the cost of the product in the base price list.
Margin Percentage	Displays the margin percentage on the product in the list.
Markup	Displays the Markup calculated for the product.
Coefficient	Dividing price of the product by cost of the product.
Suggested Price	This price is the price of the product after calculation based on option selected.
Suggested Price(Rounded)	This price is the rounded price of the product after calculation as the basis of option selected.
Primary Attribute	Displays the primary attribute of the product in the List.
Secondary Attribute	Displays the secondary attribute of the product in the List.
Select All	Click this button to select the entire product in the list.
Clear All Record	Click this button to remove the entire product in the list.
Add Products	Click this button to add the product(s) to be added in the target pricelist.
Delete Products	Click this button to delete selected product(s) from the pricelist. That is no change will be made for those products.
Ok	The button asks for confirmation and clicking on ok button of the message will save the changes to the pricelist and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Price Manager

Use this feature to manage product's prices in price list based on another price by adding, subtracting, multiplying and dividing the previous prices.

To open the screen, choose *Operations > Pricing and Promotions > Price Manager*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the price manager to be searched.
Description	Enter the description of the price manager(s) to be searched.
Price List	Select or enter the price list code to be searched.
Search Results	
Code	Displays the code of the price manager(s) searched.
Description	Displays the description of the price manager(s) searched.
Price List Name	Displays the price list name of the price manager(s) searched.
Modified By	Displays the user name who has modified the document.
Modified Date	Displays the date at which document was modified.

Data Setup Screen

Field	Description/Activity
Header Columns	
Code	Enter the code of the price manager. A unique code of a maximum of 20 alphanumeric characters can be entered.
Description	Enter the description of the price manager. A description of a maximum of 100 alphanumeric characters can be entered.
Subsidiary	Select a subsidiary, the price list modified will belong to this subsidiary only. This menu will be available once subsidiary is enabled on enterprise.
Price List	Select a price list from the list of price lists where you want to change the prices of products. This is the target price list.
Base Price List	Select a price list from the list of price lists. This will act as a base price list.
Warehouse	Select a warehouse from the list of warehouses. The warehouse list will be the warehouses that belongs to the selected subsidiary.
Adjust Price By	Select the Adjust Price By from the drop down menu for doing the operation on existing price: • AsIs

	• Adding • Subtracting • Dividing • Direct Amount
Adding/Subtracting Method	Select the Adding/Subtracting Method from the drop down menu for doing the operation on existing price: • Amount • Percent
Amount/Percentage	Enter the amount/percentage.
Rounding Option	Select the rounding option for the prices. This will be applied to the suggested (rounded) price. • RoundTo • EndsWith
Rounding Type	Select the rounding type for the prices. This will be applied to the suggested price: • RoundDown • RoundUp • RoundToNearest
Rounding	This is the factor(less than 1) based on which the rounded suggested price will be calculated.
Reason	Select a reason from the list of reason code.
Comment	Enter any comment for the price list edited.
Draft Mode	Enabling this mode will give the advantage of saving the pricelist temporarily. That means no changes will be made in the target pricelist. To make the changes in the pricelist permanent, this draft mode has to be unselected.
Detail Columns	
Select	Select the products for which the prices have to be updated.
Product Id	Displays the code of the product(s) in the price list.
Product Description	Displays the description of the product(s) in the price list.
Product Group	Displays the product group of the product(s) in the price list.
UOM	Displays UOM of the product.
Current Cost	Displays the cost of the product initially in the target price list.
Current Price	Displays the cost of the product in the base price list.
Suggested Price	This price is the price of the product after calculation as options selected in above header fields.
Select All	Click this button to select all the product in the list.
Clear All Record	Click this button to remove all products.
Add Products	Click this button to add the product(s) to be added in the target pricelist.
Delete Products	Click this button to delete selected product(s) from the pricelist.

Ok	The button asks for confirmation and clicking on ok button of the message will save the changes to the pricelist and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Goods Receipt

This option allows you to create a goods receipt document without a corresponding purchase order. This option can be used to enter the initial stocks of the various products.

To open the screen, choose *Operations > Business Transactions > Goods Receipt*.

Search Screen

Field	Description/Activity
Search Criteria	
Goods Receipt Number	Specify the number of the goods receipt transaction to be searched.
Warehouse	Click the **...** button and select a warehouse to search for Goods Receipt. It shows all Goods Receipts if you perform search without specifying a warehouse.
Search Results	
Receipt Date	Displays the date on which the goods were received for the records that satisfy the search criteria specified.
Goods Receipt Number	Displays the goods receipt number as specified in the transaction while creating it.
Warehouse	Displays the name of warehouse.

Setup Screen

Field	Description/Activity
Header Columns	
Goods Receipt Number	Enter the number by which you want to identify the transaction.
Date	Enter the date for the receipt of the goods. By default, the current date is displayed.
Business Date	Displays the business date and cannot be changed. Please note that the business date in the system changes only when the End of Day process available in the “Retail Configuration” module is completed.
To Warehouse	Displays the warehouse of the store where the goods are being received and cannot be changed by the user. If subsidiary enabled - Customer, Vendor and Product will get filtered as per subsidiary assigned to selected warehouse. If ErpSystem type is set to Unplugged, then only the general warehouse will be displayed for selection else only Retail warehouse types will be available.

To Location	Displays the location of the warehouse of the store where the goods are being received. This location can be changed by the user. The Location has to 1. Belong to the Warehouse 2. Should have goods receive option enabled. This field will be available once location is enabled on enterprise and on warehouse
Reason Code	Displays the code and type of the reason code selected. Specify the reason for the transaction by selecting one of the reason codes setup in the system. The user can select any reason code belonging to any reason code type.
Business Partner Type	This field captures the business partner type for Goods Issue. Valid values are: • None, • Customer, • Vendor
Business Partner	This field captures the business partner for Goods Issue. If the Business Partner Type is either Customer or, Vendor the button (…) opens the Customer Search / Vendor Search screen to select the appropriate Customer / Vendor.
Price List	Select a price list from the list of price lists.
Code	Displays the code of the product added to the transaction.
Description	Displays the description of the product added.
Quantity	Enter the quantity to be received for the product.
Price	The default price of the product is displayed. The user can change the price is required.
Comment	Enter any comment you may want to enter for the receipt of the product.
Add Product	Click this button to add the product(s) to be received.
Delete Product	Click this button to delete product(s) added to the transaction.
Ok	The button updates changes to the database and closes the screen. If the Goods Receipt PO is being created for a serial tracked or batch tracked product, the Serial Generation or Batch Generation screens respectively are displayed on clicking the "Ok" button.
Cancel	This button does not save any changes and closes the screen.

Purchase Order

The Purchase Order is a document used to request items or services from a vendor or supplier. It is an agreed price commitment for product or service that you are requesting.

To open the screen, choose *Operations > Business Transactions > Purchase Order*.

Search Screen

This screen enables to specify search criteria to view the details of the purchase orders, which have already been created.

Field	Description/Activity
Search Criteria	

Reference No.	Enter the Reference Number of the purchase order to be searched.
Vendor Name	Enter the name of the vendor.
Status	Select one of the statuses of the purchase order. • Open • Closed
Authorized	Select one of the purchase order authorization: • False • True • All
Warehouse	Click the **…** button and select a warehouse. It shows all purchase orders if you perform search without specifying a warehouse.
Search Results	
Vendor Name	Displays the full name of the vendor.
Delivery Date	Displays the date of delivery.
Reference No.	Displays the reference number for the PO transaction.
Store	Displays the name of store where the PO transaction was completed.
Status	Displays the status of the purchase order, which can be either Open or Closed.
Authorized	Displays if the authorization status of purchase order.
Warehouse	Displays the name of warehouse.
Total	Displays the total amount of the purchase order including tax, surcharges and discounts.

DATA SETUP SCREEN

Field	Description/Activity
Header Columns	
Vendor	Select a code from the list of vendor codes. Click … to open the Vendor Search screen and select the code. To add a new vendor record, click on "F3 New" button in the Vendor Search screen.
Vendor Name	Displays the full name of the selected vendor.
Currency	Displays currency assigned to vendor in Vendor screen. If currency is not assigned to selected customer then it displays base currency.
Warehouse	If subsidiary enabled it retrieves warehouse from Vendor-Subsidiary screen. Otherwise, it displays default warehouse form warehouse master. It does not considers In-transit warehouse. In details - product will get displays of subsidiary as per assigned subsidiary to selected warehouse
Reference No.	Enter the Reference Number of the Purchase Order.
Accounting Id	This is a system generated unique key for each PO, which helps in integration of the purchase orders in iVend, and SAP Business One.

Delivery Date	Enter the date on which you want to receive the products. To select click ▼ to open the calendar control and select the date. The default value for this field is the current date on which the purchase order is created.
Tax Code	Select a code from the list of tax codes. Click … to open the Tax Code Search screen and select the code.
Status	Displays the status of the purchase order as Open or Close. The user cannot change the status of a PO. If all the goods have been received against a PO, the status would be closed. Otherwise, the status of the PO will be Open. Closed POs cannot be changed. Any line in the PO against which full or partial goods have been received also cannot be changed.
Sub Total	Displays the total amount of the purchase order before calculating the tax and discounts.
Tax	Displays the tax amount for the purchase order calculated according to the tax definitions made for the products in the purchase order.
Discount Type	Select one of the discount types for the purchase order. • **None** – no discount is available. • **Amount** – discount available is specified in amount. • **Percentage** – discount available is specified in percentage.
Discount	Enter the discount value based on the discount type selected. This field will be disabled if the discount type chosen is "None"
Surcharges	Displays the surcharge amount added to the PO. This field cannot be directly entered/ edited by the user. Use the 'Surcharges' button to add/edit surcharge at the PO level.
Total	Displays the total amount of the purchase order including tax, surcharges and discounts.
Detail Columns	
Product	Displays the code of the product added.
Description	Displays the description of the product added.
Quantity	Enter the quantity of the product to be purchased.
Price	Displays the price of the product.
Sub Total	Displays the amount for the product calculated as (Quantity * Price).
Tax Code	Select a code from the list of tax codes. Click … to open the Tax Code Search screen and select the code.
Discount Type	Select one of the discount types for the line item. • **None** – no discount is available. • **Amount** – discount available is specified in amount. • **Percentage** – discount available is specified in percentage.
Discount	Enter the discount value based on the discount type selected.
Total	Displays the total amount of the row including tax and discounts.
Comment	Enter any comment you may want to enter for the line in the PO.
Surcharge	This button enables the user to add surcharge to the line item. Click on this button to open the Inventory Transaction Surcharges screen.

Status	Displays the status of the line item in the PO. If all the goods are received as specified in the line item, the status is displayed as Closed.
Add Product	The button enables the user to search and add products to the PO. Click on this button to open the Product Search screen and select the product. If the selected product is matrix item then the user would see options to select the matrix child based on the attribute filters. To add a new product, press "F3" or click on "F3 New" button in the Product Search screen.
Delete Product	The button enables the user to remove the products added to the PO. It deletes the selected row in the detail column. Select the row and click on the 'Delete Product' button.
Surcharge	The button enables the user to add surcharge to the PO. Click on this button to open the Inventory Transaction Surcharges screen.
Ok	The button updates changes to the database, displays the Purchase Order Report and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Good Receipt PO

Goods Receipt PO is created whenever any goods is received against any purchase order created in the system. Goods can be fully or partially received against a purchase order. Only the PO line items that are not closed are displayed in this screen.

To open the screen, choose *Operations > Business Transactions > Goods Receipt PO*.

Search Screen

Field	Description/Activity
Search Criteria	
Goods Receipt Number	Specify the number of the goods receipt transaction to be searched.
Warehouse	Click the **…** button and select a warehouse. It shows all Goods Receipt PO if you perform search without specifying a warehouse.
Search Results	
Receipt Date	Displays the date on which the goods were received for the records that satisfy the search criteria specified.
Goods Receipt Number	Displays the goods receipt number as specified in the transaction while creating it.
Warehouse	Displays the name of warehouse.

To create a new Goods receipt document:

- Click "F3" or the "F3 New" button.
- The "Purchase Order Search" screen is opened and the open POs are displayed.
- Select the PO against which the goods are to be received.
- The "Goods Receipt PO" screen is displayed.
- Enter the required data and click on Ok button.

Data Setup Screen

Field	Description/Activity
Header Column	
Goods Receipt Number	Enter the number by which you want to identify the transaction. By default, the PO number is displayed in this field.
Receipt Date	Enter the date on which the goods are received against the specified PO.
To Warehouse	Displays the warehouse of the store where the goods are being received and cannot be changed by the user. If Subsidiary enabled, In details – product will be get filtered as per subsidiary assigned to selected To Warehouse
To Location	Displays the location of the warehouse of the store where the goods are being received. The user can change this location. The Location has to 1. Belong to the Warehouse 2. Should have goods receive option enabled. This field will be available once location is enabled on enterprise and on warehouse.
Purchase Order Vendor	Displays the vendor on whom the order was placed. This value is picked from the PO and cannot be changed.
Purchase Order Accounting Id	Displays the accounting id generated for the PO. This value is picked from the PO and cannot be changed.
Purchase Order Status	Displays whether the PO is open or closed. A goods receipt PO can be created only on open PO. The user cannot change this field.
Purchase Order Total	Displays the total value of the PO. This value is picked from the PO and cannot be changed.
Purchase Order Last Updated Date	Displays the date on which the PO was last updated. This value is picked from the PO and cannot be changed.
Detail Column	
Code	Displays the product code being received.
Description	Displays the description of the product being received.
Location	Displays the location of the warehouse of the store where the goods are being received. The user can change this location. The Location has to 1. Belong to the Warehouse 2. Should have goods receive option enabled. 3. The inventory will be updated for this Location. This field will be available once location is enabled on enterprise and on warehouse.
Ordered Quantity	Displays the quantity ordered for the product in the PO.
Received Quantity	Displays the quantity of the product received so far.
Receivable Quantity	Enter the quantity being received for the product. By default, this field displays the difference between the quantity ordered and received. The user can change this value if need be.

Price	Displays the price of the product as specified in the PO. Based on the Enterprise Setting "Allow Price Change While GRPO", the user will be able to modify the price while doing the goods receipt.
Tax Code	Select a code from the list of tax codes. Click … to open the Tax Code search screen and select the code.
Comment	Enter any comment you may want to enter for the receipt of the product.
Purchase Order	Click this button to see the complete details of the PO for which the goods are being received.
Ok	The button updates changes to the database and closes the screen. If the Goods Receipt PO is being created for a serial tracked or batch tracked product, the Serial Generation or Batch Generation screens respectively are displayed on clicking the "Ok" button.
Cancel	This button does not save any changes and closes the screen.

Stock Transfer Request

Stock transfer requests are used to request for the goods from another warehouse of the company.

To open the screen, choose *Operations > Business Transactions > Stock Transfer Request*.

Search Screen

Field	Description/Activity
Search Criteria	
Status	Select the status of the transaction to be searched.
Request Number	Specify the request number of the transaction to be searched.
Acceptance Status	Displays an acceptance status as Pending which gets changed according to the action taken by the fulfilment warehouse. The acceptance status can be shown as Pending, Accepted, Partial Acepted, or Rejected.
Requesting Warehouse	Select the name of requesting warehouse. By default, it is blank which means that the search result shows the stock transfer requests from all warehouse.
Search Results	
From Warehouse	Displays the warehouse from where the stock is being transferred.
Business Date	Displays the business date on which the stock transfer transaction was created.
Request Number	Displays the request number as specified in the transaction while creating it.
Requested Date	Displays the date when the stock transfer was requested.

Data Setup Screen

Field	Description/Activity

Header Columns	
Requesting Warehouse	Displays the warehouse of the store and cannot be changed.
Request From Warehouse	Search and select the warehouse from where the stocks are required to be transferred.
From Location	Search and select the location from where the stock transfer is being requested. Only that location will be available which had been enabled for stock transfer. This field will be available once location is enabled on enterprise and on warehouse.
Business Date	Displays the business date and cannot be changed. Please note that the business date in the system changes only when the End of Day process available in the "Retail Configuration" module is completed.
Due Date	Select the date on which the stocks are requested. By default, the current date is displayed.
Request Number	Enter the request number for the stock transfer request.
Status	Displays the status of the stock transfer request and can be either Open or Closed. The transaction will remain in the Open status until the warehouse has transferred the goods against the stock transfer request.
Acceptance Status	Displays the acceptance status of the stock transfer request. By default, it shows the status as Pending.
Reason Code	Select a reason from the reason code list. Click … to open the Reason Code screen and select a reason code.
Comments	Enter any comment for the transaction.
Detail Columns	
Code	Displays the code of the product(s) added to the transaction.
Description	Displays the description of the product(s) added.
Available Quantity	Display the available quantity in the current warehouse.
UoM	Select the UoM in which the quantity is requested.
Quantity	Enter the quantity of the product to be transferred.
Open Quantity	Display the quantity that is yet to be transferred against the current request.
Accepted Quantity	Displays the quantity accepted by the fulfilling warehouse.
Reason	Select a reason from the reason code list. Click **…** to open the Reason Code Search screen and select a reason code.
Sender Reason Code	Clicking this button opens the reason code search screen. On this screen, user can select a relevant reason code.
Sender Comments	Sender can enter a comment in this field or click **…** button to open the **Comment** box then write a comment and click the **Ok** button.
Receiver Reason Code	Reason code specified by the request receiver displays here.

Receiver Comments	Comments specified by the request receiver displays here.
Accepted Quantity	Displays the quantity accepted by receiver store user. Based on this field, receiver document status is updated.
Status	Displays the status of the line item as Open or Close.
Add Product	Click this button to add the product(s) to the current stock transfer request. If the selected product is matrix item then the user would see options to select the matrix child based on the attribute filters.
Delete Product	Click this button to delete product(s) added to the transaction.
Auto Add Product	Clicking on this button will populate the items in the transaction based on the available quantity and the minimum and maximum levels defined in the system.
Import File	Click this button to import the items from a text template file.
Print	Click this button to print the stock transfer request.
Ok	The button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Stock Transfer Request Received

The Stock Transfer Request Received shows the stock transfer request received for the goods from another warehouse of the company.

To open the screen, choose *Operations > Business Transactions > Stock Transfer Request Received*.

Search Screen

Field	Description/Activity
Search Criteria	
Status	Select the status of the transaction to be searched.
Request Number	Specify the request number of the transaction to be searched.
Acceptance Status	Select an acceptance status from the given options: • Pending • Accepted • PartialAccepted • Rejected • All
To Warehouse	Select the name of warehouse.
Search Results	
From Warehouse	Displays the warehouse from where the stock is being transferred.
Business Date	Displays the business date on which the stock transfer transaction was created.
Request Number	Displays the request number as specified in the transaction while creating it.

Requested Date	Displays the date when the stock transfer was requested.

DATA SETUP SCREEN

Field	Description/Activity
	Header Columns
Requesting Warehouse	Displays the name of warehouse, which requires the goods (Requester Warehouse).
Request From Warehouse	Displays the name of warehouse from where the goods are requested. This is the warehouse from where the goods will be fulfilled (Fulfillment Warehouse).
Business Date	Displays the business date. Please note that the business date in the system changes only when the End of Day process available in the "Retail Configuration" module is completed.
Due Date	Displays the date by which the request needs to be responded.
Request Number	Enter the request number for the stock transfer.
Status	Displays the request status. By default, it shows Open.
Acceptance Status	Displays the acceptance status. By default, it shows Pending and it changes to Accepted, Partial Accepted or Rejected according to the accepted quantity.
Comments	Enter any comment for the transaction.
	Detail Columns
Code	Displays the code of the product(s) added to the transaction.
Description	Displays the description of the product(s) added.
From Location	Search and select the location from where the stock transfer is being shipped. The Location that will be available to choose from has to 1. Belong to the From Warehouse. 2. Been enabled (checked true) for stock transfer. 3. Has available quantity more than 0. This field will be available once location is enabled on enterprise and on warehouse.
UoM	Displays the UoM.
Quantity	Enter the quantity of the product to be transferred.
Open Quantity	Displays the open quantity of stock transfer.
Accepted Quantity	Allows you to enter the stock quantity that you want to transfer.
Sender Reason Code	Click the **…** button and select a reason from the **Reason Code Search** screen.
Sender Comments	Displays the comment made by stock transfer request sender.
Receiver Reason Code	Click the **…** button to open the **Reason Code Search** screen and select a reason code. You can also remove the reason code by click the X button.
Receiver Comments	Enter your comment in this field or click the **…** button to open the Comment box and write a comment then click the **Ok** button.

Status	Displays the status of the line item as Open or Close.
Copy To Stack Transfer	Click this button to copy accepted and partially accepted stock transfer request to the **Stock Transfer Shipment** document.
Reject All	Click this button to reject all stock transfer request.
Ok	The button updates changes to the database and closes the screen. If the Stock Transfer Shipment is being done for a serial tracked or batch tracked product, the Serial Selection or Batch Selection screens respectively are displayed on clicking the "Ok" button.
Cancel	This button does not save any changes and closes the screen.

Stock Transfer Shipment

Stock transfers are used to transfer the goods from one warehouse to another warehouse of the company. The warehouse from where the goods are being shipped creates the Stock Transfer Shipment transaction and the receiving warehouse uses the Stock Transfer Receipt option to receive the goods in their warehouse.

To open the screen, choose *Operations > Business Transactions > Stock Transfer Shipment*.

Search Screen

Field	Description/Activity
Search Criteria	
Reference Number1, Reference Number2	Specify the reference number of the stock transfer shipment transaction to be searched.
Status	Select the status of the transaction to be searched.
Request Number	Specify the request number of the transaction to be searched.
Warehouse	Select a warehouse who has requested for the stock transfer shipment. By default, it is blank which means that the search result shows the stock transfer requests from all warehouse.
Search Results	
From Warehouse	Displays the warehouse from where the stock is being transferred.
To Warehouse	Displays the warehouse to which the stock is being transferred.
Business Date	Displays the business date on which the stock transfer transaction was created
Request Number	Displays the request number as specified in the transaction while creating it.
Requested Date	Displays the date when the stock transfer was requested.

Data Setup Screen

Field	Description/Activity

Header Columns	
From Warehouse	Displays the warehouse of the store and cannot be changed.
From Location	Search and select the location from where the stock transfer is being shipped. Only that location will be available that belongs to the From Warehouse and has been enabled for stock transfer. This field will be available once location is enabled on enterprise and on warehouse.
To Warehouse	Search and select the warehouse where the stock needs to be transferred.
Business Date	Displays the business date and cannot be changed. Please note that the business date in the system changes only when the End of Day process available in the "Retail Configuration" module is completed.
Requested Date	Select the date on which the stock transfer was requested. By default, the current date is displayed.
Request Number	Enter the request number for the stock transfer.
Reference No. 1, Reference No. 2	Enter the reference number(s) for the transaction so that the transaction can be easily searched and identified.
Status	Displays the status of the stock transfer and can be either Open or Closed. The transaction will remain in the Open status until the receiving warehouse receives the complete stock by creating the Stock Transfer Receipt transaction.
Sales Person	Select a sales person from the list of sales persons. Click … to open the Employee Search screen and select a sales person.
Comments	Enter any comment for the transaction.
Detail Columns	
Code	Displays the code of the product(s) added to the transaction.
Description	Displays the description of the product(s) added.
From Location	Search and select the location from where the stock transfer is being shipped. The Location that will be available to choose from has to 4. Belong to the From Warehouse. 5. Been enabled (checked true) for stock transfer. 6. Has available quantity more than 0. This field will be available once location is enabled on enterprise and on warehouse.
Quantity	Enter the quantity of the product to be transferred.
Status	Displays the status of the line item as Open or Close. The status will be close only when all of the quantity specified for transfer is received at the receiving warehouse through a Stock Transfer Receipt transaction.
Add Product	Click this button to add the product(s) to be transferred. If the selected product is matrix item then the user would see options to select the matrix child based on the attribute filters. If subsidiary is enabled, product get filtered for which assigned subsidiary is applicable to selected From warehouse and To warehouse.

Delete Product	Click this button to delete product(s) added to the transaction.
Ok	The button updates changes to the database and closes the screen. If the Stock Transfer Shipment is being done for a serial tracked or batch tracked product, the Serial Selection or Batch Selection screens respectively are displayed on clicking the "Ok" button.
Cancel	This button does not save any changes and closes the screen.

Stock Transfer Receipt

Stock Transfer Receipt transaction is created to receive goods against the stock transferred between warehouses through the Stock Transfer Shipment transaction. Goods can be fully or partially received against a stock transfer shipment.

To open the screen, choose *Operations > Business Transactions > Stock Transfer Receipt*.

Search Screen

Field	Description/Activity
Search Criteria	
Goods Receipt Number	Specify the number of the receipt transaction to be searched.
Warehouse	Click the **...** button to open the Warehouse Search screen and select a warehouse.
Search Results	
Receipt Date	Displays the date on which the goods were received.
Goods Receipt Number	Displays the goods receipt number as specified in the transaction while creating it.
Warehouse	Displays the name of warehouse.

To create a new Stock Transfer Receipt document,

- Click "F3" or the "F3 New" button
- The "Stock Transfer Shipment Search" screen is opened and the open Stock Transfer Shipment documents are displayed.
- Select the Stock Transfer Shipment against which the goods are to be received.
- The "Stock Transfer Receipt" screen is displayed.
- Enter the required data and click on Ok button.

Data Setup Screen

Field	Description/Activity
Header Column	
Stock Transfer Receipt Number	Enter the number by which you want to identify the transaction.
Receipt Date	Enter the date on which the goods are received against the specified Stock Transfer Shipment.
From Warehouse	Displays the warehouse of the store from where the goods are being sent and cannot be changed by the user.

To Warehouse	Displays the warehouse of the store where the goods are being received and cannot be changed by the user.
Stock Transfer Request Date	Displays the date on which the request for the stock transfer was given.
Price List	Specify the price list, which is to be used for updating the price of received goods. The same will be used to determine the Goods Receipt price for the calculation of the cost of the received goods.
Sales Person	Select a sales person from the list of sales persons. Click … to open the Employee Search screen and select a sales person.
Detail Column	
Code	Displays the code of the product being received.
Description	Displays the description of the product being received.
Transferred Quantity	Displays the quantity transferred for the product in the Stock Transfer.
Received Quantity	Displays the quantity of the product received so far.
Receivable Quantity	Enter the quantity being received for the product. By default, this field displays the difference between the quantity ordered and received. The user can change this value if need be.
Comment	Enter any comment you may want to enter for the receipt of the product.
Stock Transfer	Click this button to see the complete details of the Stock Transfer Shipment against which the goods are being received.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Goods Issue

This option is useful to record the use of goods being internally used in the store. For example, a store might use a computer that it sells for its own use. Once a goods issue is created, it cannot be modified or deleted and can only be viewed.

To open the screen, choose *Operations > Business Transactions > Goods Issue*.

Search Screen

Field	Description/Activity
Search Criteria	
Transaction Number	Specify the unique number of the transaction to be searched.
Reference Number	Specify the reference number of the transaction to be searched.
Warehouse	Click the **…** button and select a warehouse. It shows all Goods Issues if you perform search without specifying a warehouse.
Search Results	
Transaction Number	Displays the system generated transaction number.

Reference Number	Displays the reference number of the transaction as entered by the user while creating it.
Entry Date	Displays the date on which the transaction was created.
Business date	Displays the business date on which the transaction was created.
Id	Displays the name of warehouse.

DATA SETUP SCREEN

Field	Description/Activity
	Header Columns
Reference Number	Enter the reference number for the transaction so that the transaction can be easily searched and identified.
Entry Date	Enter the date when the stock use is being captured in the system. By default, this field displays the current date.
Business Date	Displays the business date and cannot be changed. Please note that the business date in the system changes only when the End of Day process available in the "Retail Configuration" module is completed.
Warehouse	Displays the warehouse of the store where the stock is getting affected and cannot be changed by the user.
Location	Displays the location of the Warehouse the warehouse of the store where the stock is getting affected. The user can change this location. The Location has to 1. Belong to the Warehouse 2. Should have goods issue option enabled. This field will be available once location is enabled on enterprise and on warehouse.
Reason	Specify the reason for the transaction by selecting one of the reason codes setup in the system. The user can select any reason code belonging to any reason code type.
Comment	Enter any comment related to the transaction.
Business Partner Type	This field captures the business partner type for Goods Issue. Valid values are: • None, • Customer, • Vendor
Business Partner	This field captures the business partner for Goods Issue. If the Business Partner Type is either Customer or, Vendor the button (…) opens the Customer Search / Vendor Search screen to select the appropriate Customer / Vendor.
	Detail Columns
Code	Displays the code of the product consumed internally at the store.
Description	Displays the description of the product.
Location	Displays the location of the Warehouse of the store where the stock is getting affected. The user can change this location. The Location has to 1. Belong to the Warehouse 2. Should have goods issue option enabled. 3. Should have available quantity greater than 0. 4. The inventory will be updated for this Location.

	This field will be available once location is enabled on enterprise and on warehouse.
Quantity	Enter the quantity used.
Reason	Specify the reason for using the product by selecting one of the reason codes setup in the system. The user can select any reason code belonging to any reason code type.
Comment	Enter any comment related to the consumption of the product.
Add Product	Click this button to add the product(s) used by the store. If the selected product is matrix item then the user would see options to select the matrix child based on the attribute filters. If subsidiary is enabled, product get filtered for which assigned subsidiary is applicable to selected warehouse.
Delete Product	Click this button to delete product(s) added to the transaction.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Goods Return

This option is useful to record the goods being returned to vendor. Goods can be returned to vendor against the GRPO done for the purchase order.

To open the screen, choose *Operations > Business Transactions > Goods Return*.

Search Screen

Field	Description/Activity
	Search Criteria
Goods Return Number	Specify the goods return number to be searched.
Vendor Id	Specify the vendor for which the records are to be searched.
Warehouse	Click the **...** button and select a warehouse. It shows all Goods Issues if you perform search without specifying a warehouse.
	Search Results
Company Name	Displays the system vendor of the goods return documents.
Reference Number	Displays the reference number of the transaction as entered by the user while creating it.
Return Date	Displays the date on which the transaction was created.
Total	Displays the total of the goods return document.
Id	Displays the id of warehouse.

Data Setup Screen

Field	Description/Activity
	Header Columns
Vendor	Select a code from the list of vendor codes. Click … to open the Vendor Search screen and select the code. To add a new vendor record, click on "F3 New" button in the Vendor Search screen.
Warehouse	Displays the warehouse of the store where the stock is being returned.
Location	Displays the location of the Warehouse of the store where the stock is being returned. The user can change this location. The Location has to 1. Belong to the Warehouse 2. Should have goods return option enabled. This field will be available once location is enabled on enterprise and on warehouse
Goods Receipt PO	Select the Goods Receipt PO against which the items are to be returned back to the vendor.
Reference No.	Enter the Reference Number of the goods return document.
Accounting Id	This is a system generated unique key for each Goods Return Document.
Return Date	Enter the date on which you want to want to return the products. To select click ▼ to open the calendar control and select the date.
Tax Code	Select a code from the list of tax codes. Click … to open the Tax Code Search screen and select the code.
Sub Total	Displays the total amount of the purchase order before calculating the tax and discounts.
Tax	Displays the tax amount for the purchase order calculated according to the tax definitions made for the products in the Goods Return Document.
Discount Type	Select one of the discount types for the purchase order. • **None** – no discount is available. • **Amount** – discount available is specified in amount. • **Percentage** – discount available is specified in percentage.
Discount	Enter the discount value based on the discount type selected. This field will be disabled if the discount type chosen is "None"
Surcharges	Displays the surcharge amount added to the Goods Return Document. This field cannot be directly entered/ edited by the user. Use the 'Surcharges' button to add/edit surcharge at the Goods Return Document level.
Total	Displays the total amount of the purchase order including tax, surcharges and discounts.
Comment	Enter the comments.
Reason	Select the reason code from the Reason Code look up.
	Detail Columns
Product	Displays the code of the product added.
Location	Displays the location of the Warehouse of the store where the stock is being returned. The user can change this location. The Location has to 1. Belong to the Warehouse 2. Should have goods return option enabled. 3. Should have available quantity greater than 0. 4. The inventory will be updated for this Location.

	This field will be available once location is enabled on enterprise and on warehouse.
UoM	Displays the UoM of the product added.
Quantity	Enter the quantity to be returned.
Price	Displays the price of the product.
Sub Total	Displays the amount for the product calculated as (Quantity * Price).
Tax Code	Select a code from the list of tax codes. Click … to open the Tax Code Search screen and select the code.
Discount Type	Select one of the discount types for the line item. • **None** – no discount is available. • **Amount** – discount available is specified in amount. • **Percentage** – discount available is specified in percentage.
Discount	Enter the discount value based on the discount type selected.
Total	Displays the total amount of the row including tax and discounts.
Comment	Enter any comment you may want to enter for the line in the Goods Return Document.
Surcharge	This button enables the user to add surcharge to the line item. Click on this button to open the Inventory Transaction Surcharges screen.
Add Product	The button enables the user to search and add products to the Goods Return Document. Click on this button to open the Product Search screen and select the product. If the selected product is matrix item then the user would see options to select the matrix child based on the attribute filters. To add a new product, press "F3" or click on "F3 New" button in the Product Search screen. If subsidiary is enabled, product get filtered for which assigned subsidiary is applicable to selected warehouse.
Delete Product	The button enables the user to remove the products added to the Goods Return Document. It deletes the selected row in the detail column. Select the row and click on the 'Delete Product' button.
Surcharge	The button enables the user to add surcharge to the Goods Return Document. Click on this button to open the Inventory Transaction Surcharges screen.
Ok	The button updates changes to the database, displays the Purchase Order Report and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Kit Build/Break

Use this screen to setup and break the kits. The screen gives information of the number of kits available and how much inventory is available to create more kits. The user can then specify the number of kits that need to be built or broken. If the amount is specified in negative, the system breaks the specified number of kits.

To open the screen, choose *Operations > Business Transactions > Kit Build Break*.

Data Setup Screen

Field	Description/Activity
Kit Code	Displays the code of the product setup as kit.

Kit Description	Displays the description of the product.
Quantity Available	Displays the number of kits that are already built and available for sale at POS.
Available To Build	Displays the number of kits that can be made from the existing stock of the components of the kit. For example, if a kit has 2 components and there are 5 numbers available for each of the component, 5 kits can still be built.
Build Location	Displays the location where kit inventory will be impacted.
Kit Location	Displays the location where kit components inventory will be impacted.
Quantity	The quantity of kits to be built or broken. If a positive number is specified, a kit is created (provided the number is less than or equal to the Available to Build number). A negative quantity signifies breaking of the kits. For example, if you specify -2 as the quantity, 2 kits would be broken.
Add	Click this button to search and select the product for which the kit needs to be built or broken.
Delete	Click this button to remove the selected products from the screen. Select the row, which has to be deleted and click on this button.
View Details	This button enables to view the details of the components of the selected kit. Select the row whose details have to viewed and click on this button to open the Kit Components screen.
Ok	This button updates changes to the database and closes the screen.
Cancel	This button does not save any changes and closes the screen.

Inventory Count

This feature allows the user to do physical count of the inventory items. It also enables the user to reconcile system inventory against the actual inventory in a store or location.

To open the widow , choose *Operations > Business Transactions > Inventory Counting*.

Search Screen

Field	Description/Activity
Search Criteria	
Counting Date	Business date against which counting was done.
Status	Status of the counting transaction performed. Valid values are : • **Open :** Inventory is not reconciled and status is open • **Close :** Inventory is reconciled and transaction status is closed
Search Results	
Id	Displays the id of the inventory counting transaction.
Description	Displays the description of the inventory counting transaction.
Counting Date	Displays the business date against which counting was done.
User Id	Displays the id of user who has performed the inventory counting transaction in the system.
Status	Displays the status of the inventory transaction.

DATA SETUP SCREEN

Field	Description/Activity
Inventory Count Selection	
Store	Select the store where inventory count is being done.
From Product	Select this field to set the start of the product range for which inventory count is being done.
To Product	Select this field to set the end of the product range for which inventory count is being done.
Product Group	Select the product group to perform inventory count for all the products under selected group.
Next	The button takes to the next screen to add products for inventory count.
Cancel	The button does not save any changes and closes the screen.
Inventory Count Setup	
Id	Enter the id of the transaction being performed.
Description	Enter the description of the transaction being performed.
Comment	Enter the comment for the counting transaction.
Use Starting Quantity For Reconciliation	Check this field to use starting quantity for inventory reconciliation process.
Product Id	Field displays the id of the product for which inventory count is being performed.
Product Description	Field displays the description of the product for which inventory count is being performed.
In Store Quantity	Displays the in store quantity of the product.
Count	Check this field to count inventory for the product.
[Auto Add Products]	Click the button adds all the products for inventory count.
[Add Product]	Click the button to add any particular product for inventory count.
[Delete Product]	Click the button to delete a product.
[count Inventory]	Click the button to initiate counting process and move to inventory counting screen.
[Cancel]	Cancel button does not save anything and closes the screen.
Inventory Counting	
Product Id	Displays the id of the product for which inventory is being counted.
Product Description	Displays the description of the product for which inventory is being counted.
Counted Quantity	Enter the actual count of the inventory.
Starting quantity	Displays the starting quantity of the item.
Location	Displays the location of item with in the warehouse.

	This field is visible only if location is enabled for the selected warehouse.
In Store Quantity	Displays the system counted in store quantity of the item.
Reconcile	Check this option to reconcile the inventory for that item.
Reconciled	Displays whether inventory is reconciled for that item.
Difference Quantity	Displays the difference between counted quantity and in store quantity.
[Show/Hide In Store Quantity]	Button displays/hides starting quantity and In store quantity options.
[ShowHide Difference]	Button displays/hides difference quantity option.
[Import File]	Click the button to import products through a text file.
[Count UoM Inventory]	Counts the inventory for UoM items.
[Print]	Prints the inventory counting information.
[Reconcile ALL]	Select all the records for reconciliation.
[Reconcile Inventory]	Button reconciles the inventory for selected records and generates goods receipt or goods issue documents accordingly.
[Cancel]	Cancel button does not save anything and closes the screen.

Expenses

This feature would enable the user to record petty expense incurred at the Store and POS. The user would also be able to capture comments and reason codes against the expense captured.

User is not allowed to update or delete any expense that has been captured.

To open the screen, choose *Operations > Business Transactions > Expense*.

Search Screen

Field	Description/Activity
Search Criteria	
Store Id	Store id where the expense was captured.
Business Date	Business date against which the expense was captured.
POS Id	POS id where the expense was captured.
Entry Date	Date when the expense was captured.
Search Results	
Store Id	Store id where the expense was captured.
Entry Date	Date when the expense was captured.

Data Setup Screen

Field	Description/Activity
Store	Store code of the store where the expense is being captured.
Amount	Expense amount, which needs to be captured.
Reason Code	Select a code from the list of reason codes available. Click … to open the Reason Code screen and select the code.
Comment	Enter any comments, if required. A comment of maximum 200 alphanumeric characters can be entered.
Business Date	Business date of the store for which the expense is being captured. User entry is not allowed, as this field is pre populated.
Entry Date	Current date at the time of expense capture. User entry is not allowed, as this field is pre populated.
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Forecast Planning

Use this feature to search for the existing forecast planning templates and to setup new forecast planning templates.

Based on the forecast planning templates, user can generate the sales forecast for the products.

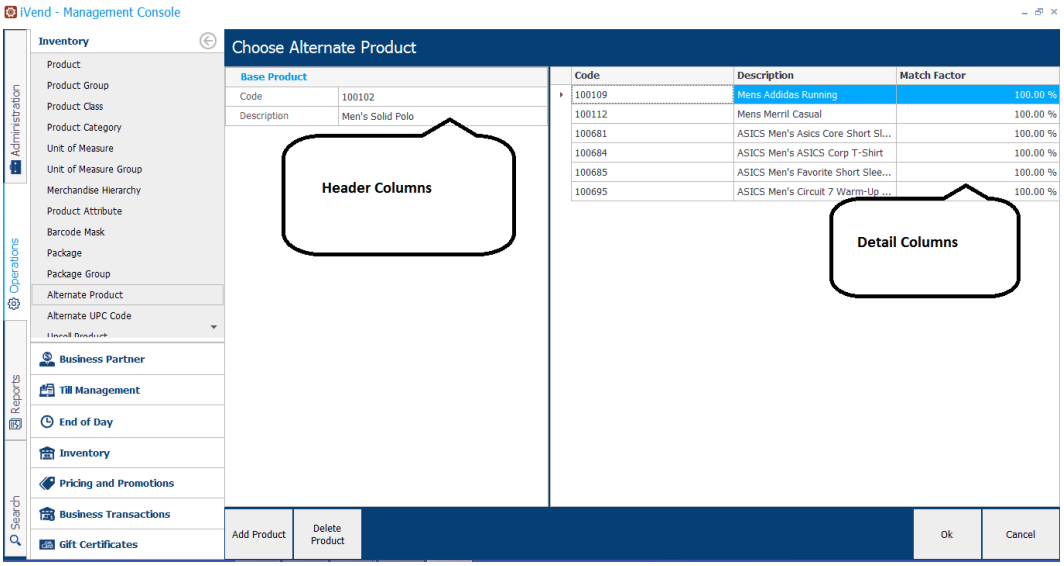
To open the screen, choose *Inventory Transactions > Forecast Planning*.

Field	Description/Activity
Search Criteria	
Code	Enter the code of the Forecast Planning to be searched.
Description	Enter the description of the Forecast Planning to be searched.
Search Results	
Code	Displays the code of the Forecast (s) searched.
Description	Displays the description of the Forecast Planning(s) searched.
Subsidiary	Displays the Subsidiary of the Forecast planning searched. (If Subsidiary is enabled).
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Data Setup Screen

Field	Description/Activity
Code	Specify the code for the Forecast Planning. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Mention the description for the Forecast Planning. A description of maximum 100 alphanumeric characters can be entered.

Applicable Subsidiary	Select a Subsidiary to which the forecast planning belongs from the list of Subsidiaries. Click [...] to open the Subsidiary Search screen and select the Subsidiary. This field will be available if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Historical Sales Year	Specify the year from which the sales should be considered for generating the forecasts. For example, if the selected year is 2011 and the current year is 2014 then all the sales that are done between 01-Jan-2011 and 31-Dec-2013 will be considered for generating the forecast for the year 2014.
Forecast Year	Specify the Year for which the forecast is to be generated.
Based On	Select one of the following: • Product • Product Category • Product Group • Merchandise Hierarchy
From	Select the value associated to the Based On. For example if the Based On is Product, then From would be the Product code. This field will not be shown in case the forecast is being generated based on the Merchandise Hierarchy.
To	Select the value to be considered for generating the forecast. This field will not be shown in case the forecast is being generated based on the Merchandise Hierarchy.
Merchandise Hierarchy	Select a Merchandise Hierarchy from the list of Merchandise Hierarchy(s). Click *[...]* to open the Merchandise Hierarchy Search screen and select the Merchandise Hierarchy.



Merchandise Hierarchy Node	Select a Merchandise Hierarchy Node from the above selected Merchandise Hierarchy. Click *[...]* to open the Merchandise Hierarchy Node and select the Merchandise Hierarchy node. 1. Field will be visible only for Based On Merchandise Hierarchy. 2. Allow to select only parent level node of hierarchy.
Consider Refund In Forecast	Check this flag in case you want to consider the refunds made while generating the forecast.
Details	
Select	Select the warehouse to include in forecast.
Warehouse Id	It is read only field and display the Warehouse Id.
Warehouse Description	It is read only field and display the Warehouse Description.
[Ok]	This button saves the changes and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Forecast

Forecasting or (better known as) Sales Forecasting is the process of estimating what your business's sales are going to be in the future. A forecast is based on historical sales data is done for a particular period in the near future, usually the next calendar year. A sales forecast enables a company to make informed business decisions regarding your inventory or your cash flow or plan for growth.

For this reason, forecasting should be a central activity in your operations.

Forecasting in iVend POS 6.2 provides a wide range of forecasting models with an automatic "best pick" option. The Forecast window in iVend Management Console is an intuitive interface that displays hierarchical data in a tree-like structure, allowing you to work at different level of details with a simple click of the mouse. As you navigate from item to item, synchronized sections displaying graphical and tabular data are instantly updated.

Forecasts can be generated based on product, product group, product categories and merchandise hierarchy. Furthermore, the forecast can be consumed in MRP calculations.

Replenishment Scenario

The Replenishment Scenario is a document used to generate purchase orders based on minimum stock level setting in Inventory Item.

To open the screen, choose *Operations > Business Transactions > Replenishment Scenario*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Specify the code of the replenishment scenario to be searched.
Description	Specify the description of the replenishment scenario to be searched.

Search Results	
Code	Displays the code of replenishment scenario searched.
Description	Displays the description of replenishment scenario searched.

DATA SETUP SCREEN

Field	Description/Activity
Header Columns	
Code	Enter the country code. It allows entering a unique code of maximum 20 alphanumeric characters.
Description	Enter the country description. It allows entering a description of maximum 100 alphanumeric characters.
Start Date, End Date	Enter date range to consider purchaser order history.
Based On	Select value Based On from below listed values: • Product • Product Category • Product Group
From, To	Select Product range to consider purchase order history.
Recommend Purchase	Set flag value to recommend purchase.
Purchase Recommendation Type	Select recommendation type from below listed values. • LocalPurchase • AllPurchase
Recommend Stock Transfer	Set Flag value to recommend stock transfer.
Time Range	Select time range from below listed values. • PlanningHorrizon • IncludeHistoricalData
Details	
Select	Click on checkbox to select warehouse to generate replenishment.
Warehouse Id	Displays warehouse Id.
Warehouse Description	Displays warehouse description.
Subsidiary	Displays Subsidiary of warehouse. This field is visible if subsidiary is enabled through enterprise setup screen.
[Select All]	Button provided to select all checkboxes.
[Run]	Button to generate replenishment as per selected criteria and display "*Recommendation*" screen.
[Cancel]	Button to cancel replenishment and close screen.

Recommendation

The recommendation is a document used to post purchase order generation as per generated replenishment and provided requirement by user.

Field	Description/Activity
Select	Click checkbox to select record.
Order Date	Displays purchase order date.
Product Id	Displays product Id.
Product Description	Displays product description.
Warehouse	Select warehouse generated purchase order.
To Warehouse	Displays warehouse to send purchase order.
UOM	Select a code from the list of UOM codes. Click [...] to open the UOM Search screen and select the code.
Order Quantity	Displays order quantity of recommendation.
Due Date	Displays due date of recommendation.
Due Quantity	Displays due quantity of recommendation.
Category	Displays category of replenishment method: • LocalPurchase • Transfer • Kitting
Status	Displays MRP Result status: • PastDue • Historic • Current
Vendor	Select a code from the list of vendor codes. Click [...] to open the Vendor Search screen and select the code. To add a new vendor record, click on "F3 New" button in the Vendor Search screen.
[Post]	Post recommendation with0020enterd values.
[Cancel]	Button to cancel post recommendation and close screen.

Mobile POS Delivery

Use this feature to create packages from the special orders to make delivery through mobile POS.

To open the screen, choose *Operations > Business Transactions > Mobile POS Delivery*.

Field	Description/Activity
General	
POS	Lookup to select mobile POS to assign created packages for delivery.
Details	
Transaction Id	Display the transaction Id of special order.

Customer Id	Display the customer Id of special order.
Customer Name	Display the customer name of special order.
Store	Display the store where special order is created.
Location	Select the location from the list of locations of the warehouse that belongs to the store to which the selected POS is connected. The location must have Fulfillment option enabled. This field will be available once location is enabled on enterprise and on warehouse.
POS	Display the POS where special order is created.
User	Display the name of user who created the special order.
Balance Amount	Displays the balance amount of special order.
Amount to collect	By default, it displays the balance amount of special order and allow to edit amount for the package to collect.
Delivery Date	Displays the delivery date of special order.
Select	Allow to select special orders to create packages.
[Select All]	The button select all the special orders to create packages.
[Create Package]	The button create packages for selected special orders and save them in database.
[Package(s)]	The button opens a new view, which displays all the created packaged which are not delivered.
[Ok]	The button does not save any changes and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Delivery Package Screen

Field	Description/Activity
Package Id	Displays the package Id of package.
Transaction Id	Displays the transaction Id of Special order.
Store	Displays the store where package is created.
Package Amount	Displays the package amount to be collected at the time of delivery.
Delivery Date	Displays the delivery date of package.
Select	Allow to select packages to delete.
[Select All]	The button select all the packages to delete.
[Delete Package]	The button deletes the packages from the system.

Location Transfer

Location Stock transfers are used to transfer the goods of warehouse from one location to another location.

To open the screen, choose *Operations > Business Transactions > Stock Transfer Shipment*.

This menu will be available once location is enabled on enterprise.

Search Screen

Field	Description/Activity
Search Criteria	
Reference Number1, Reference Number2	Specify the reference number of the location stock transfer transaction to be searched.
Request Number	Specify the request number of the transaction to be searched.
Search Results	
From Location	Displays the location from where the stock is being transferred.
Business Date	Displays the location where the stock is being received.
Request Number	Displays the business date on which the location stock transfer transaction was created.
Requested Date	Displays the date when the location stock was requested.

Data Setup Screen

Field	Description/Activity
Header Columns	
Warehouse	Displays the warehouse of the store. If you are on pure enterprise or mixed mode then It will display all warehouse where location is enabled.
From Location	Search and select the location from where the stock needs to be transferred.
To Location	Search and select the location where the stock needs to be transferred.
Business Date	Displays the business date and cannot be changed. Please note that the business date in the system changes only when the End of Day process available in the "Retail Configuration" module is completed.
Request Number	Enter the request number for the location stock transfer.
Reference No. 1, Reference No. 2	Enter the reference number(s) for the transaction so that the transaction can be easily searched and identified.
Sales Person	Select a sales person from the list of sales persons. Click … to open the Employee Search screen and select a sales person.
Comments	Enter any comment for the transaction.
Reason	Select a reason from the list of reason code.
Detail Columns	
Code	Displays the code of the product(s) added to the transaction.
Description	Displays the description of the product(s) added.
From Location	Search and select the location from where the stock needs to be transferred. It will display the location where stock is available.
To Location	Search and select the location where the stock needs to be transferred.
UOM	Search and select the UOM.

Available Quantity	Displays the stock available at selected from location.
Quantity	Enter the quantity of the product to be transferred.
Reason	Select a reason from the list of reason code.
Add Product	Click this button to add the product(s) to be transferred. If the selected product is matrix item then the user would see options to select the matrix child based on the attribute filters.
Delete Product	Click this button to delete product(s) added to the transaction.
Ok	The button updates changes to the database and closes the screen. If the location Stock Transfer is being done for a serial tracked or batch tracked product, the Serial Selection or Batch Selection screens respectively are displayed on clicking the "Ok" button.
Cancel	This button does not save any changes and closes the screen.

Gift Certificate

Different type of gift certificates issued by store to its customer can be defined from this menu option.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the product to be searched.
Description	Enter the description of the product to be searched.
Group	Enter the gift certificate group to be searched.
Category	Enter the gift certificate category to be searched.
Search Results	
Code	Displays the code of the product(s) searched.
Description	Displays the description of the product(s) searched.
Group	Displays the product group to which the gift certificate belongs.
Base Price	Displays the price of the gift certificate.
Subsidiary	Displays the Subsidiary of the gift certificate searched. (If Subsidiary is enabled).

Data Setup Screen

Field	Description/Activity
Code	Display the code of the gift certificate. This is system generated and depends on the number series that is defined for the store.
Description, Short Description, Long Description	Enter the description for the Gift Certificate. A text of maximum 100 alphanumeric characters can be entered for description and short description and of maximum 200 characters for long description.

Applicable Subsidiary	Select a Subsidiary to which the Gift Certificate belongs from the list of Subsidiaries. Click [...] to open the Subsidiary Search screen and select the Subsidiary. It is visible if subsidiary is enabled. Once saved the master, assigned Subsidiary cannot be changed.
Group	Select a group to which the gift certificate belongs from the list of product groups. Click … to open the Group Search screen and select the group. To add a new group, press "F3" or click on "F3 New" button in the Group Search screen.
Base Price	Enter the unit price of the gift certificate
Gift Certificate Type	Select the type of gift certificate from the list of the available options. Gift certificate type can be either of the following choices: • **Pre Printed**: User can track the inventory for this type of Gift Certificates. In addition, user would be able to transfer this type of gift certificates to another location. • **System Generated**: These gift certificates are generally paper-based gift certificates. These are automatically generated at the time of selling. The user has an option of printing these gift certificates at the time of sales. • **User Defined**: User is forced to specify the serial number of the gift certificates that is being sold to customer. These are normally card-based gift certificates for which the inventory tracking is not required.
Use as Store Credit	Mark this flag if you want to issue this gift certificate as the Store Credit. Only one gift certificate could be marked as Store Credit in the system. The store credit comes handy in several situations as if when store does not give the cash back to the customer for the refunds and instead want then to buy other stuff for the value of the returned item.
Validity Period (Days)	User can specify the validity period in days for the gift certificate. By default gift certificates has the expiry period as 0, which indicates that the gift certificates will never expire. After the validity period is over the gift certificate expires and customer would not be able to redeem this further.
Cash Bach	Select the option to enable the cash back on the gift certificate.
On Hold	Select the option if the user wants to put the gift certificate on hold. Gift certificates that are marked as on hold would not be allowed to sell further, however the redemption of the already sold gift certificates would still be allowed.
UPC Code	Enter the Universal Product Code (UPC) for the gift certificate. UPC is a type of bar code that is widely used in United States and Canada.
Open Price	Select this option to allow the user at POS to specify the price of the gift certificate during a sale. When this option is selected for a gift certificate, on adding this gift certificate to the sale, the system would display the "Gift Certificate Item Information" screen with the existing price of the gift certificate. The user can change the price, if required.
Open Description	Select this option to allow the user at POS to specify the description of the gift certificate during a sale. When this option is selected for a gift certificate, on adding this product to the sale, the system would display the "Gift

	Certificate Item Information" screen with the existing description of the gift certificate. The user can change the description, if required.
Must Swipe Card	Select this option in case you would like the cashier to swipe the gift card while collecting the payment by Gift Certificate. This would stop cashier entering the gift certificate number and would only allow cashier to take the payment by swiping the gift cards at the PoS.
Print Gift Certificate	Select this option in case you would like iVend to print the Gift Certificate when the gift certificates are purchased by the customers. This setting is kept to false when a card based gift cards are used.
Reprint on Redemption	Select this option in case you would like to reissue a fresh gift certificate when the original gift certificate is partiall redeemed. This setting is generallydone for the paper based gift certificates where the partial redemption of gift certificates is allowed.
Minimum Amount for Reprinting	In case the Reprint on Redemption option is selected, user can specify the minimum amount for which the gift certificate should be printed. For e.g. if the balance amount after redemption on the gift certificate is $0.20 and the setting is for $1.00 then iVend would not re-print a gift certificate for the balance amount.
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Gift Certificate Receipt

The option allows you to create a goods receipt document without a corresponding purchase order. This option can be used to enter the initial stocks of the various products.

Search Screen

Field	Description/Activity
Search Criteria	
Goods Receipt Number	Specify the number of the goods receipt transaction to be searched.
Search Results	
Receipt Date	Displays the date on which the goods were received for the records that satisfy the search criteria specified.
Goods Receipt Number	Displays the goods receipt number as specified in the transaction while creating it.

Data Setup Screen

Field	Description/Activity
Header Columns	
Goods Receipt Number	Enter the number by which you want to identify the transaction.
Date	Enter the date for the receipt of the goods. By default, the current date is displayed.

To Warehouse	Displays the warehouse of the store where the goods are being received and cannot be changed by the user.
Reason Code	Displays the code and type of the reason code selected. Specify the reason for the transaction by selecting one of the reason codes setup in the system. The user can select any reason code belonging to any reason code type.
Detail Columns	
Code	Displays the code of the product added to the transaction.
Description	Displays the description of the gift certificate added.
Quantity	Enter the quantity to be received for the gift certificate.
Price	The default price of the product is displayed. The user can change the price is required.
Comment	Enter any comment you may want to enter for the receipt of the gift certificate.
Add Gift Certificate	Click the button to add the gift certificates(s) to be received. If the selected product is matrix item then the user would see options to select the matrix child based on the attribute filters.
Delete Gift Certificate	Click the button to delete gift certificates(s) added to the transaction.
Print	Users can takeout print of the Goods Receipt document from this option.
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Stock Transfer Shipment

Stock transfers are used to transfer the gift certificate of type Preprinted from one warehouse to another warehouse of the company. The warehouse from where the gift certificates are being shipped creates the Stock Transfer Shipment transaction and the receiving warehouse uses the Stock Transfer Receipt option to receive the gift certificates in their warehouse.

Search Screen

Field	Description/Activity
Search Criteria	
Reference Number1, Reference Number2	Specify the reference number of the stock transfer shipment transaction to be searched.
Status	Select the status of the transaction to be searched.
Request Number	Specify the request number of the transaction to be searched.
Search Results	
From Warehouse	Displays the warehouse from where the gift certificates are being transferred.
Business Date	Displays the business date on which the stock transfer transaction was created.

Request Number	Displays the request number as specified in the transaction while creating it.
Requested Date	Displays the date when the stock transfer was requested.

DATA SETUP SCREEN

Field	Description/Activity
Header Columns	
From Warehouse	Displays the warehouse of the store and cannot be changed.
To Warehouse	Search and select the warehouse where the gift certificates needs to be transferred.
Business Date	Displays the business date and cannot be changed. Please note that the business date in the system changes only when the End of Day process available in the "Retail Configuration" module is completed.
Requested Date	Select the date on which the stock transfer was requested. By default, the current date is displayed.
Request Number	Enter the request number for the stock transfer.
Reference No. 1, Reference No. 2	Enter the reference number(s) for the transaction so that the transaction can be easily searched and identified.
Status	Displays the status of the stock transfer and can be either Open or Closed. The transaction will remain in the Open status until the receiving warehouse receives the complete stock by creating the Stock Transfer Receipt transaction.
Sales Person	Select a sales person from the list of sales persons. Click … to open the Employee Search screen and select a sales person.
Comments	Enter any comment for the transaction.
Detail Columns	
Code	Displays the code of the gift certificates added to the transaction.
Description	Displays the description of the gift certificate(s) added.
Quantity	Enter the quantity of the gift certificate(s) to be transferred.
Status	Displays the status of the line item as Open or Close. The status will be close only when all of the quantity specified for transfer is received at the receiving warehouse through a Stock Transfer Receipt transaction.
Add Gift Certificates	Click the button to add the gift certificates(s) to be transferred.
Delete Gift Certificate	Click the button to delete gift certificates(s) added to the transaction.
Ok	The button updates changes to the database and closes the screen. The "Serial Selection" screens respectively are displayed on clicking the "Ok" button.
Cancel	The button does not save any changes and closes the screen.

Serial Selection

The screen is displayed when a Stock Transfer Shipment/ Stock Transfer Receipt is being created for any serial tracked product. The screen enables the user to select the serial number(s) from which the stock is to be transferred.

DATA SETUP SCREEN

Field	Description/Activity
Products	
Id	Displays the code of the product (s) for which the serial number(s) is to be selected.
Description	Displays the description of the product (s) for which the serial number(s) is to be created.
Quantity Required	Displays the quantity for which the serial number(s) are to be selected. It displays the value entered in the "Quantity" field of the "Stock Transfer Shipment"/ "Goods Issue" Screen or the "Receivable Quantity in the "Stock Transfer Receipt" Screen.
Quantity Selected	Displays the quantity for which the serial numbers are selected. The value in the field is automatically updated as the serial numbers are selected for the product.
Quantity Remaining	Displays the quantity for which the serial numbers are to be selected. The value in the field is calculated as (Quantity Required - Quantity Selected).
Available Serial	
Serial Number	Displays the serial numbers available for the selected line item in the "Products" grid.
Selected Serial	
Serial Number	Displays the serial number(s) selected to be transferred for the selected line item in the "Products" grid.
Buttons	
>	The button enables to automatically transfer the "Quantity Required" from the "Available Serial" grid to the "Selected Serial" grid in the order the serial numbers are mentioned in the "Available Serial" grid.
>	The button enables the user to select the serial number(s) in the "Available Serial" grid from which the "Quantity Required" is to be transferred to the "Selected Serial" grid. The user can select the serial number(s) in the "Available Serial" grid and click the "Ok" button.
<	The button enables the user to select the serial number in the "Selected Serial" grid, which is to be transferred back to the "Available Serial" grid. The user needs to select the serial number in the "Selected Serial" grid and click the button.

<<	The button enables to automatically transfer back all the serial number(s) from the "Selected Serial" grid to the "Available Serial "grid. On clicking the button, the serial number(s) in the "Selected Serial" grid are transferred back to the "Available Grid".
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Stock Transfer Receipt

Stock Transfer Receipt transaction is created to receive gift certificates against the stock transferred between warehouses through the Stock Transfer Shipment transaction. Gift certificates can be fully or partially received against a stock transfer shipment.

Search Screen

Field	Description/Activity
Search Criteria	
Goods Receipt Number	Specify the number of the receipt transaction to be searched.
Search Results	
Receipt Date	Displays the date on which the goods were received.
Goods Receipt Number	Displays the goods receipt number as specified in the transaction while creating it.

To create a new Stock Transfer Receipt document,

- Click "F3" or the "F3 New" button
- The "Stock Transfer Shipment Search" screen is opened and the open Stock Transfer Shipment documents are displayed.
- Select the Stock Transfer Shipment against which the goods are to be received.
- The "Stock Transfer Receipt" screen is displayed.
- Enter the required data and click on Ok button.

Data Setup Screen

Field	Description/Activity
Header Column	
Stock Transfer Receipt Number	Enter the number by which you want to identify the transaction.
Receipt Date	Enter the date on which the goods are received against the specified Stock Transfer Shipment.
From Warehouse	Displays the warehouse of the store from where the goods are being sent and cannot be changed by the user.
From Location	Displays the location of a Warehouse from where the goods are being transferred. The user can change this location. The Location has to- 1. Belong to the To Warehouse 2. Should have stock transfer option enabled.

	This field will be available once location is enabled on enterprise and on warehouse.
To Warehouse	Displays the warehouse of the store where the goods are being received and cannot be changed by the user.
To Location	Displays the location of the To Warehouse where the goods are being received. The user can change this location. The Location has to- 1. Belong to the To Warehouse 2. Should have goods receive option enabled. This field will be available once location is enabled on enterprise and on warehouse.
Stock Transfer Request Date	Displays the date on which the request for the stock transfer was given.
Sales Person	Select a sales person from the list of sales persons. Click … to open the Employee Search screen and select a sales person.
Detail Column	
Code	Displays the code of the product being received.
Description	Displays the description of the product being received.
From Location	Displays the location of the From Warehouse from where the goods are being transferred. The user can change this location. The Location has to- 1. Belong to the Warehouse. 2. Should have stock transfer option enabled. 3. Should have available quantity greater than 0. 4. The inventory will be updated for this Location. This field will be available once location is enabled on enterprise and on warehouse.
To Location	Displays the location of the To Warehouse where the goods are being received. The user can change this location. The Location has to 1. Belong to the To Warehouse. 2. Should have goods receive option enabled. 3. The inventory will be updated for this Location. This field will be available once location is enabled on enterprise and on warehouse.
Transferred Quantity	Displays the quantity transferred for the product in the Stock Transfer.
Received Quantity	Displays the quantity of the product received so far.
Receivable Quantity	Enter the quantity being received for the product. By default, this field displays the difference between the quantity ordered and received. The user can change this value if need be.
Comment	Enter any comment you may want to enter for the receipt of the product.
Stock Transfer	Click the button to see the complete details of the Stock Transfer Shipment against which the goods are being received.
Print	User can takeout print of the Goods Receipt document from this option.
Ok	The button updates changes to the database and closes the screen.

Cancel	The button does not save any changes and closes the screen.

Expired Gift Certificate

From this menu option, the user would be able to post the corresponding journal entries for the expired gift certificates. The list of expired gift certificate will only see the list of gift certificates, which are expired, and the corresponding entries are not posted in SAP Business One.

SCREEN

Field	Description/Activity
Gift Certificate	Displays the expired gift certificate.
Gift Certificate Number	Displays the serial number of the expired gift certificate.
Expired Date	Displays the expiry date of the expired gift certificate.
Balance	Displays the balance of the expired gift certificate.
Buttons	
Post Entries	The button will generate the corresponding journal entries for the balance amount of the selected gift certificates.
Ok	The button updates changes to the database and closes the screen.
Cancel	The button does not save any changes and closes the screen.

Product List

Product List also called quick entry form for Product Master that includes all the operations related to a product.

This screen facilitates multiple products creation/modification at the same time. It contains 2 panels:

- Search Panel
- Details Panel.

To open screen - Management Console > Operations > Inventory > Product List.

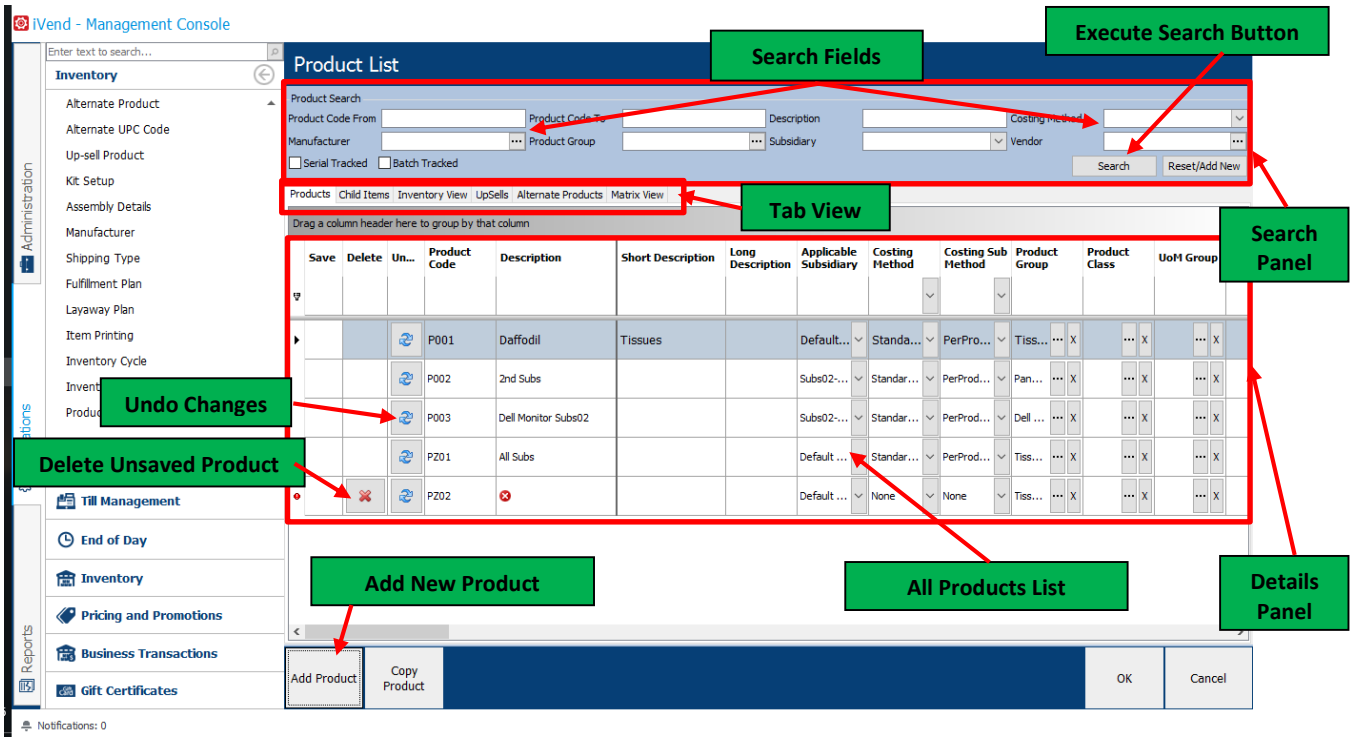


Figure 9 – Product List Screen

To Search with Search Criteria Fields

Step	Action	Result
1.	Product Code From	Enter the code of the product, from this code the searched product range will start.
2.	Product Code To	Enter the code of the product, at this code the searched product range will end. i.e all the products having Product Code lies between the range entered will be searched.
3.	Description	Enter the description of the product(s) to be searched manually.
4.	Costing Method	Select the costing method for which data to be displayed. The valid values are: • None • Average Cost • Standard Cost
5.	Manufacturer	Click [...] to select the manufacturer. You can type some initial characters and press Tab; it will search the manufacturer code starting from those characters and will display the first one.
6.	Product Group	Click [...] to select the product group. You can type some initial characters and press Tab; it will search the product group code starting from those characters and will display the first one.
7.	Subsidiary	Select one subsidiary from the listed values.
8.	Vendor	Click [...] to select the vendor. If multiple subsidiary is enabled, then subsidiary selection is must before selecting the vendor. You can type some initial characters and press Tab; it will search the vendor names starting from those characters and will display the first one.
9.	[Search].	All the products which are non-matrix and parent (if matrix) are listed in the Products tab based on search criteria (if any).

Products Tab

Select this tab to see all products in the store at one place. Every row represents a product and contains its related information like product group, costing method, vendor and manufacturer information ,product attributes etc. User can add/edit multiple products in details panel at one time.

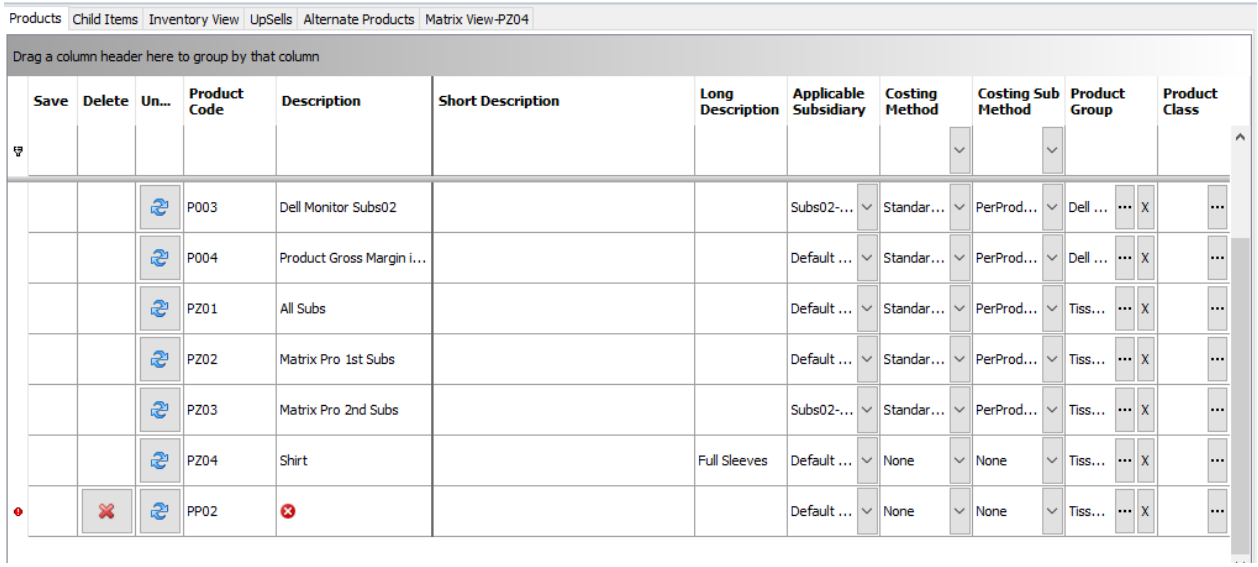


Figure 2 – Products tab

Child Items Tab

Highlight a product in Products tab and click on Child Items tab to see all its child products. Every child item has same properties like parent product and can be changed in this tab.

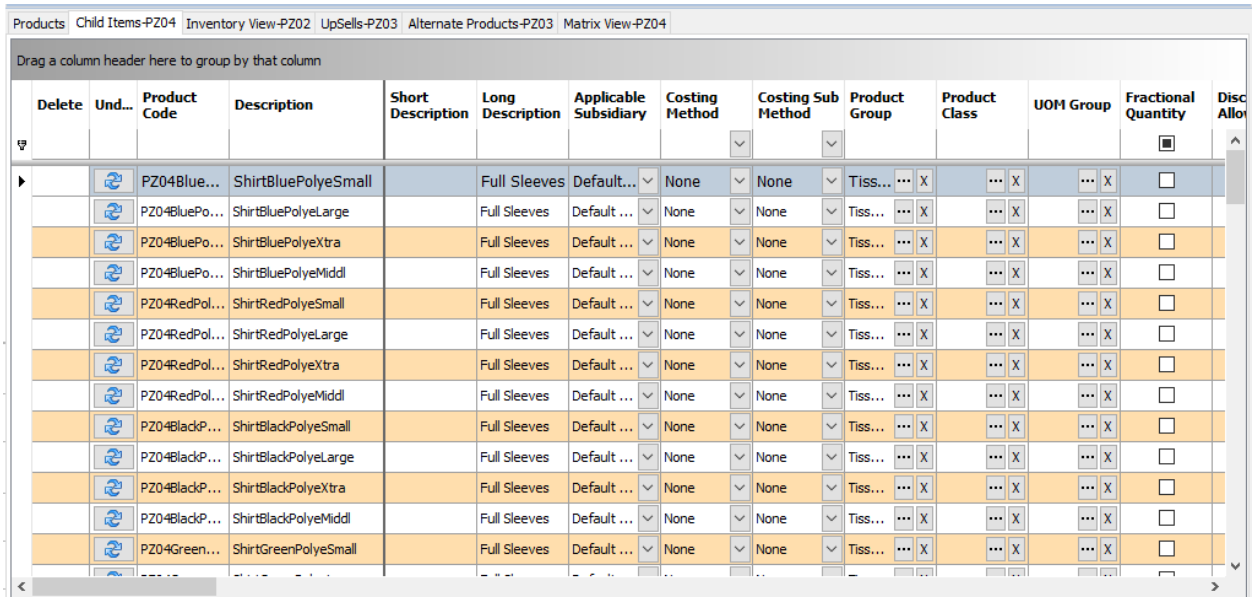


Figure 3 – Child Items tab

Inventory View Tab

Highlight a product in Products tab and click on Inventory View tab. This tab shows the inventory of the selected product. If it is a non-matrix product, its available quantity, instock quantity, price, price margin etc. will be shown warehouse-wise. However, if it is a matrix product, only the available quantity and instock quantity will be shown for the parent as well as child product.

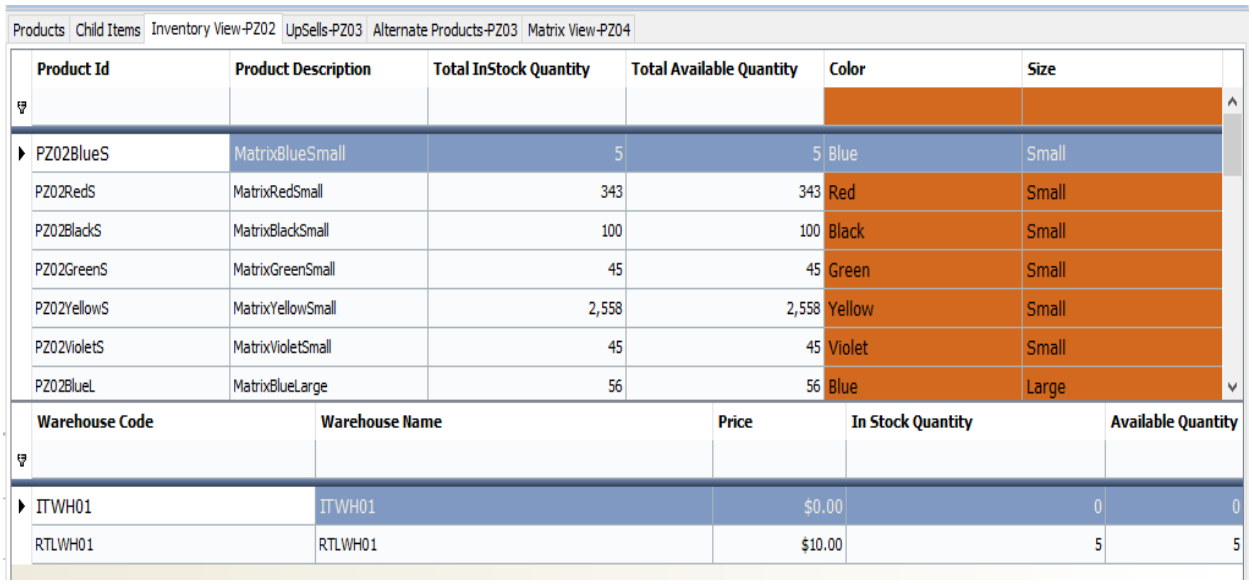


Figure 4 – Inventory View tab

Upsells Tab

Highlight a product in Products tab and click on Upsells tab. This tab will show all the upsell products (if any) which are attached to the selected product. This tab will show all the upsell products and their type i.e., System Generated or Amount and discount applicable (if any).

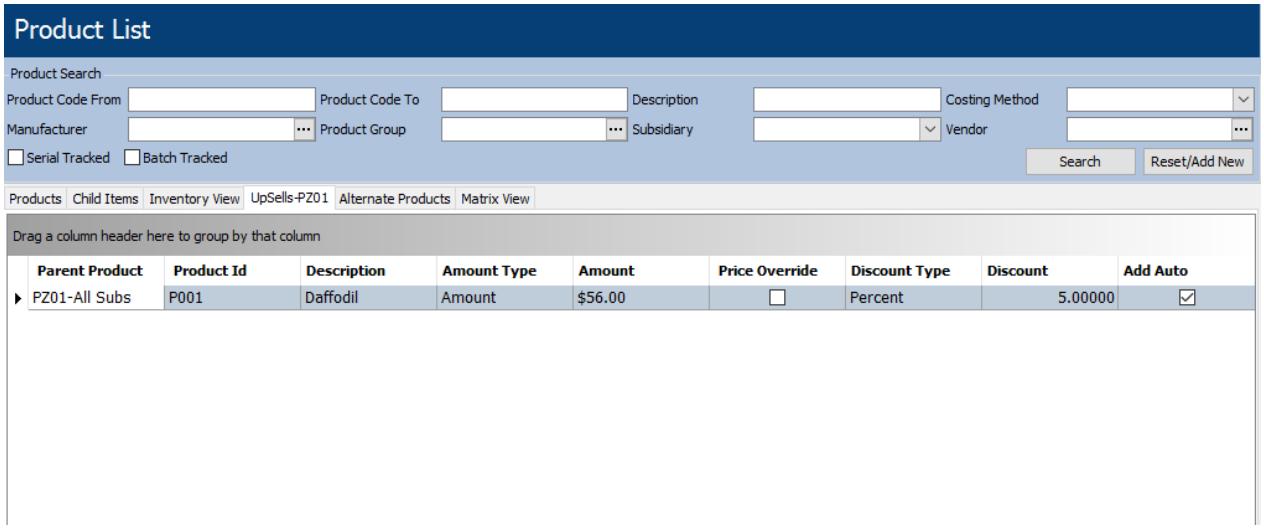


Figure 5 – Upsells tab

Alternate Products Tab

Select any child item in Child Items tab and click on Alternate Products tab to see its alternate product. By default, parent product is the alternate product for child items. Parent product id and description can be seen here.

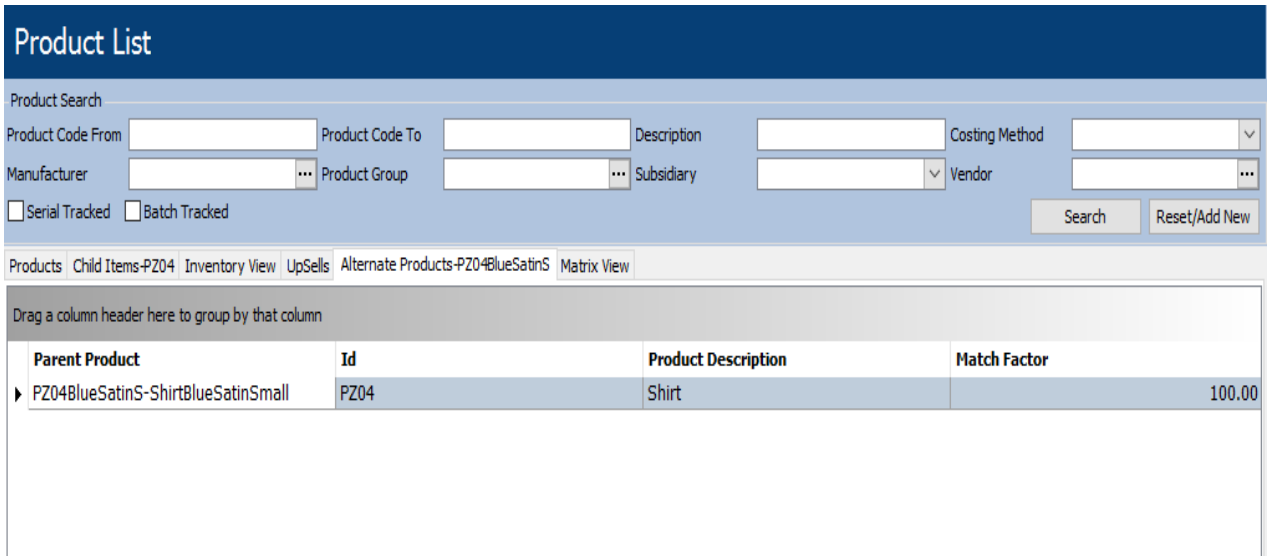


Figure 6 – Alternate Products tab

Matrix View Tab

This tab provides the matrix view for all the attributes of the selected product. Different options like Display Options, Primary Attribute and Secondary Attribute etc. are available to refine the search. Also, quantity and prices can be viewed at different stores.

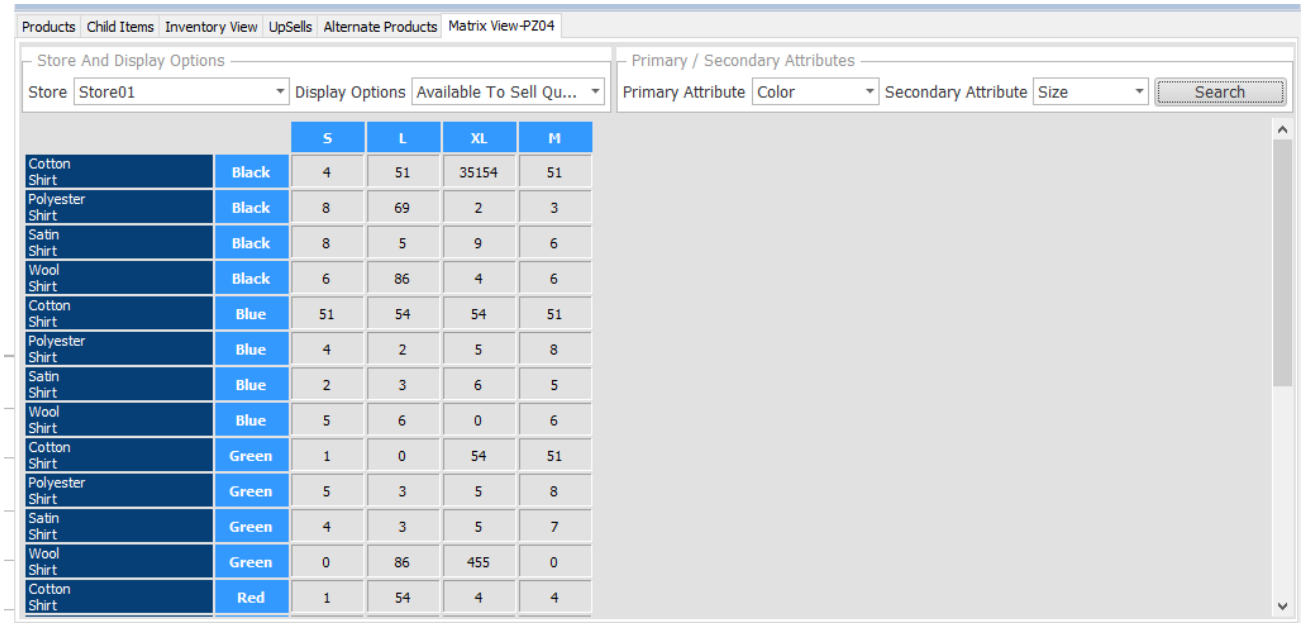


Figure 7 – Matrix View tab

To Search with Search Criteria Fields

Step	Action	Result
1.	Store	Select a store in which the product is to be searched.
2	Display Options	Select the option for which data to be displayed. The valid values are: • Available to Sell Quantity

		• On Fulfillment Quantity • In Stock Quantity • Unit Price • Unit Cost • Unit Margin • Total Price Available to Sell • Total Price In Stock • Total Cost • Total Margin Available to Sell • Total Margin In Stock • Coefficient
10.	Primary Attribute	Select the primary attribute from the product attributes. If any primary attribute is defined for the product, it will display as selected value by default.
11.	Secondary Attribute	Select the secondary attribute from the product attributes.
12.	[Search]	All the products which are matrix are listed based on search criteria.

Product Prices and Margin

Product prices and margin screen helps calculate to margin percentage, markup, coefficient or price for a products depending upon the current cost.

Setup Screen

Field	Description/Activity
	General
Rounding Type	Selected the rounding type from avaliable values. Valid values are: • RoundToNearest • RoundUp • RoundDown
Rounding	Displays the price lists available.
Current Cost	Enter the current cost of the product.
Margin Percentage	Displays the calculated margin percentage . Value can also be edited to adjust other values.
Markup	Displays the markup value calculated depending upon other values. Markup value can be edited to adjust other fields.
Coefficient	Displays coefficient calculated from other values. It can also e edited to adjust cost,markup ,margin percentage etc.
Price	Displays the calculated price, value can be edited.

Price(Rounded)	Displays the rounded price depending upon the rounding type selected and rounding value entered.
[OK]	Click the button to update selected price list with calculated values.
[Cancel]	Closed the screen and returns to product screen.

Reports

Use the *Reports* module to view and print various reports related to sales, stock transfer, and other transactions and create and print labels.

Create Label Report

The feature enables to design labels for printing on EPL, ZPL based printers. For designing labels, the measurement unit is millimeter.

Reports created using this feature will appear in list with other formats in Format field of Item Label Printing feature.

To open the screen, choose *Reports > Designer/Label > Create Label Report*.

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the label to be searched.
Description	Enter the description of the label(s) to be searched.
Search Results	
Code	Displays the code of the label(s) searched.
Description	Displays the description of the label(s) searched.
Width (mm)	Displays the width of the label(s) searched in millimetre
Height (mm)	Displays the height of the label(s) searched in millimetre

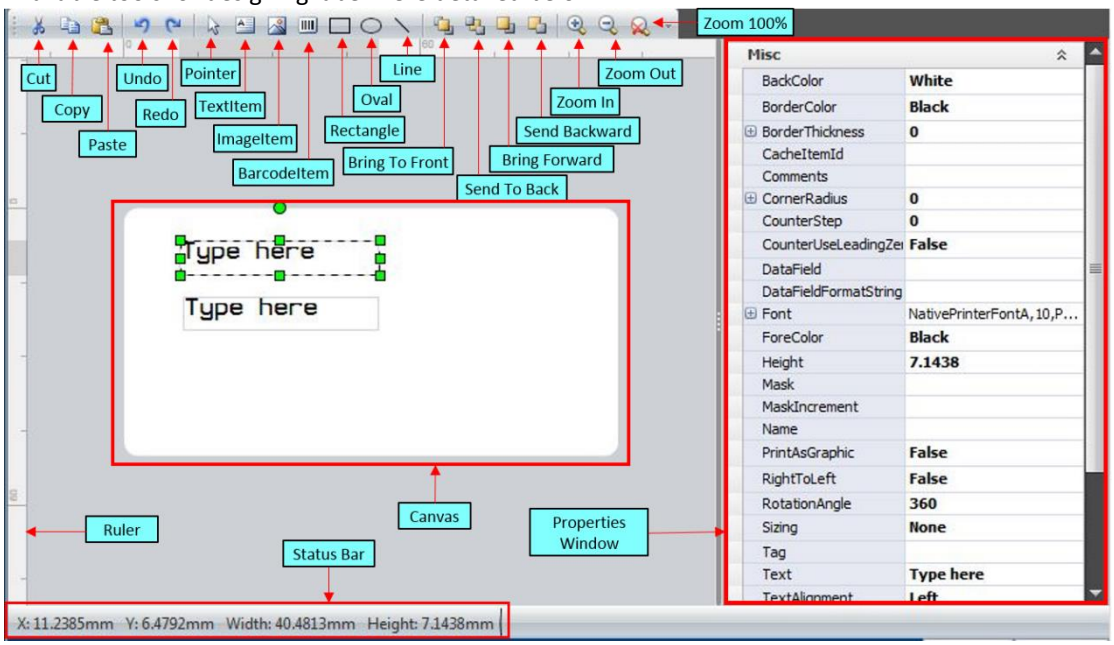
Setup Screen

Field	Description/Activity
Code	Enter the code of the label. A unique code of maximum 20 alphanumeric characters can be entered.
Description	Enter the description of the label. A description of maximum 100 alphanumeric characters can be entered.
Width (mm)	Enter the width of the label in millimetre.
Height (mm)	Enter the height of the label in millimetre.
Labels Per Row	Number of lables per row to print in the media roll.
Is Continuous	Whether this label will be printed on a continuous media roll i.e. labels are not separated by gaps, spaces, notches, slots, or holes.
Gap Length	Vertical gap length bwtween labels.
Labels Horizontal Gap Length	Horizontal gap length between labels when the labels are printing more than one label per row.

Mark Length	Mark length or thickness between labels.
Offset Length	Top margin for the label.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Label Designer Screen

Available tools for designing label were detailed below:



Click on Text Item from toolbar and place on canvas. Select the required detail (like Price, Product Description) from datafield property from the list to show with that TextItem. Change required properties of the selected item in property window like ForeColor, BackColor, font and other properties as required.

Datafield property supports with TextItem, BarcodeItem only.

Image can be shown from file stored on disk only.

Use Line, Rectangle, Oval items for decorating label.

TextItem, Barcode items can be rotated by 90, 270,360 degrees angle only. Remaining items can be rotated by any angle.

Tool	Description/Activity
Cut	Moves the object to the clipboard.
Copy	Puts a copy of the selection on the clipboard so you can paste it somewhere else.
Paste	Places a copy from clipboard that was put using Cut or Copy.
Undo	Cancels last activity like placing/deleting a Item on canvas, moving, resizing.
Redo	Reverses the activities that were canceled using Undo.
Pointer	Used to select any item placed on canvas.
TextItem	Used to show the text, numeric type data.

	Put text in Text property to show static text. Select a item from Datafield property to show data related to a product, vendor, product group, etc.
ImageItem	Used to show image from a file stored on disk.
BarcodeItem	Used to show barcode. Use Code property to show static code. Use Datafield property for showing data related to product. Use symbology, BarHeight, BarWidth and other properties for controlling the display of bar code.
Rectangle	Draws a rectangle. Use FillColor, StrokeColor, StrokeThickness properties to change appearance of the rectangle.
Oval	Draws a Oval. Use FillColor, StrokeColor, StrokeThickness properties to change appearance of the oval.
Line	Draws a Line. Use FillColor, StrokeColor, StrokeThickness properties to change appearance of the line.
Bring To Front	Brings the selected item in front of all other items.
Send To Back	Sends the selected item behind all other items.
Bring Forward	Bring the selected item forward one level so that it is hidden behind fewer objects.
Send Backward	Send the selected item back one level so that it is hidden behind more objects.
Zoom In	Increases zoom level, to examine closely.
Zoom Out	Decreases zoom level, to view entire canvas.
Zoom 100%	Set zoom level to normal.
Canvas	Space for placing label items.
Ruler	Located on top, left side of the canvas for indicating the location, size of the item while placing on canvas.
Properties Window	Use properties window to set/change properties of selected item on canvas.
Status bar	Shows Size, Location of the selected on canvas.

Item Label Printing

Item label printing is used to print the label for products.

To open the screen, choose *Reports> Designer/Label> Item Label Printing*.

Field	Description/Activity
	Header Columns
Store	Select the store for which the labels are to be printed.

Format	Select the Label format which is to be used for printing the labels.
Barcode Symbology	Select the Bar code Symbology that is to be used on the labels for printing the product bar code.
Quantity	Enter the quantity that is to be applied for all the labels.
Detail Columns	
Product Id	Displays the code of the product added for label printing.
Product Description	Displays the description of the product added.
Quantity to Print	Enter the quantity to be printed for the product.
Serial/Batch Number	Enter the Serial/Batch information to be printed on the labels.
Price	Enter any price of an item to be printed on the labels. If the price is not entered then the price is picked from the store price list.
Weight	Enter the weight of the product. This is enabled in case if the product is weighted item.
UoM	Select the UoM information to be printed on the labels.
Barcode	Enter the bar code to be printed on the label for the product. If a product has a bar code masking then the bar code is constructed by the system based on the bar code mask attached to the product.
Buttons	
Add Product	Click this button to add the product for label printing.
Delete Product	Click this button to delete the product for label printing.
Import Records	Click this button to import the label printing information from an excel template.
Smart Product Selection	Clicking this button would open an "Smart product selection" screen from where the user can filter the products based on the last label printing date and price change date.
Ok	Generates labels based on the screen information.
Cancel	Closes the screen without printing the labels

Shelf Label Printing

Shelf label printing is used to print the label for shelves.

To open the screen, choose *Reports > Designer/Label > Shelf Label Printing*.

Field	Description/Activity
Header Columns	
Store	Select the store for which the labels are to be printed.
Format	Select the Label format which is to be used for printing the labels.
Barcode Symbology	Select the Bar code Symbology that is to be used on the labels for printing the product bar code.

Quantity	Enter the quantity that is to be applied for all the labels.
Detail Columns	
Product Id	Displays the code of the product added for label printing.
Product Description	Displays the description of the product added.
Quantity to Print	Enter the quantity to be printed for the product.
Serial/Batch Number	Enter the Serial/Batch information to be printed on the labels.
Price	Enter any price of an item to be printed on the labels. If the price is not entered then the price is picked from the store price list.
Weight	Enter the weight of the product. This is enabled in case if the product is weighted item.
UoM	Select the UoM information to be printed on the labels.
Barcode	Enter the bar code to be printed on the label for the product. If a product has a bar code masking then the bar code is constructed by the system based on the bar code mask attached to the product.
Buttons	
Add Product	Click this button to add the product for label printing.
Delete Product	Click this button to delete the product for label printing.
Import Records	Click this button to import the label printing information from an excel template.
Smart Product Selection	Clicking this button would open an "Smart product selection" screen from where the user can filter the products based on the last label printing date and price change date.
Ok	Generates labels based on the screen information.
Cancel	Closes the screen without printing the labels

Query Builder

This option is useful to create new queries in the system. Once the queries are defined then it can be used in the following.

1. Dashboards
2. Campaign Management
3. Scheduler
4. Reporting

To open the screen, choose *Reports > Designer/Label > Create Label Report*.

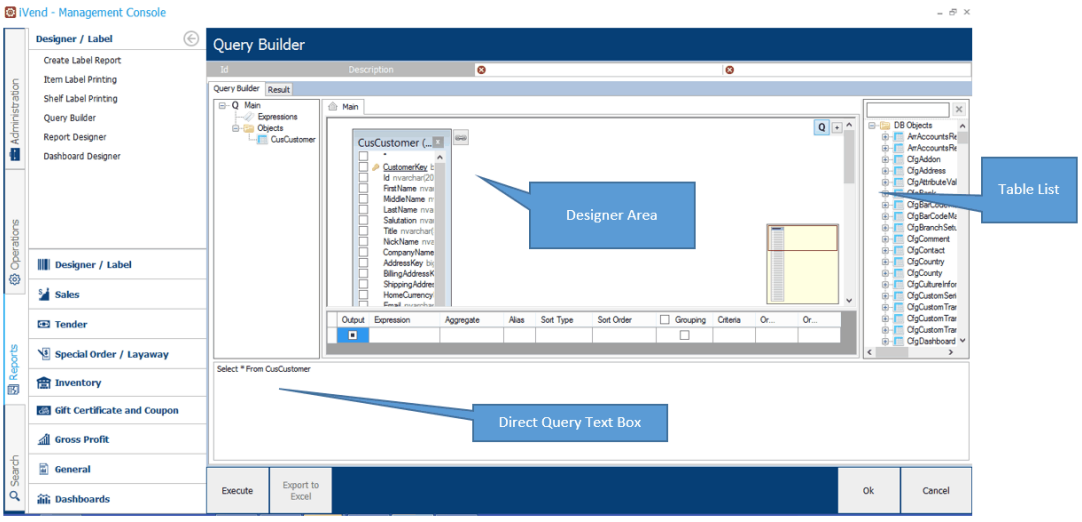
Search Screen

Field	Description/Activity
Search Criteria	
Id	Specify the Id of the query to be searched.

Description	Specify the Description of the query to be searched.
Search Results	
Id	Displays the Id of the query.
Description	Displays the Description of the query.

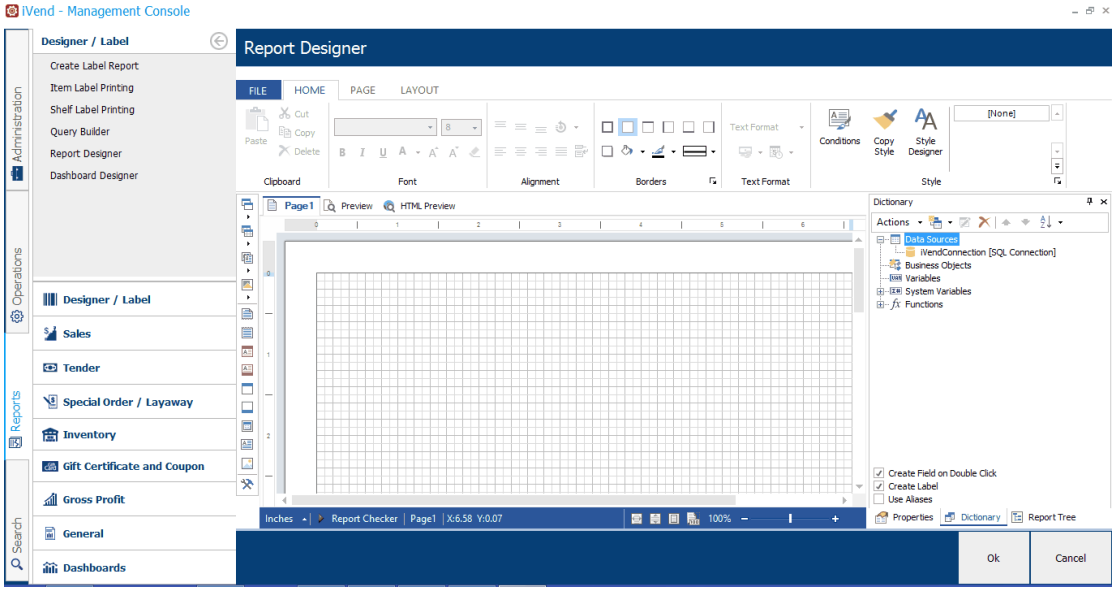
SETUP SCREEN

Field	Description/Activity
Search Criteria	
Id	Specify the Id of the query.
Description	Specify the Description of the query.
Designer Area	
Table List	Displays the List of tables from iVend database.
Designer Area	Shows the selected tables. Tables can be dragged from the table list onto the Designer area. If multiple tables are selected then the tables must be joined. To specify a join on a table you can drag and drop a column of a table onto another table.
Direct Query Text Box	If users are comfortable writing the query directly then instead on selecting the table from the table list a query can be directly written in this area.
Buttons	
Execute	Click on this button to execute the query and see the results.
Export to Excel	Click on this button to export the results to an excel file.
OK	Saves the record in the database.
Cancel	This button does not save any changes and closes the screen.



Report Designer

Use this option to create new reports using iVend Report Editor.
To open the screen, choose *Reports > Designer/Label > Report Designer*.



Dashboard Designer

This feature enables to design dashboards for viewing and printing. To open Dashboard Designer select *Reports > Dashboard Designer*.

Dashboards created using this feature will appear in the list under *Reports > Dashboards*.

After creating the dashboard, it will appear in the Dashboards list after restarting the Management Console only.

Each dashboard required *Read* permission to view, *Full* permission to view and print/export.

To view the dashboard created, choose *Reports > Dashboard Designer*

Search Screen

Field	Description/Activity
Search Criteria	
Code	Enter the code of the label to be searched.
Description	Enter the description of the dashboard(s) to be searched.
Search Results	
Code	Displays the code of the dashboard(s) searched.
Description	Displays the description of the dashboard(s) searched.

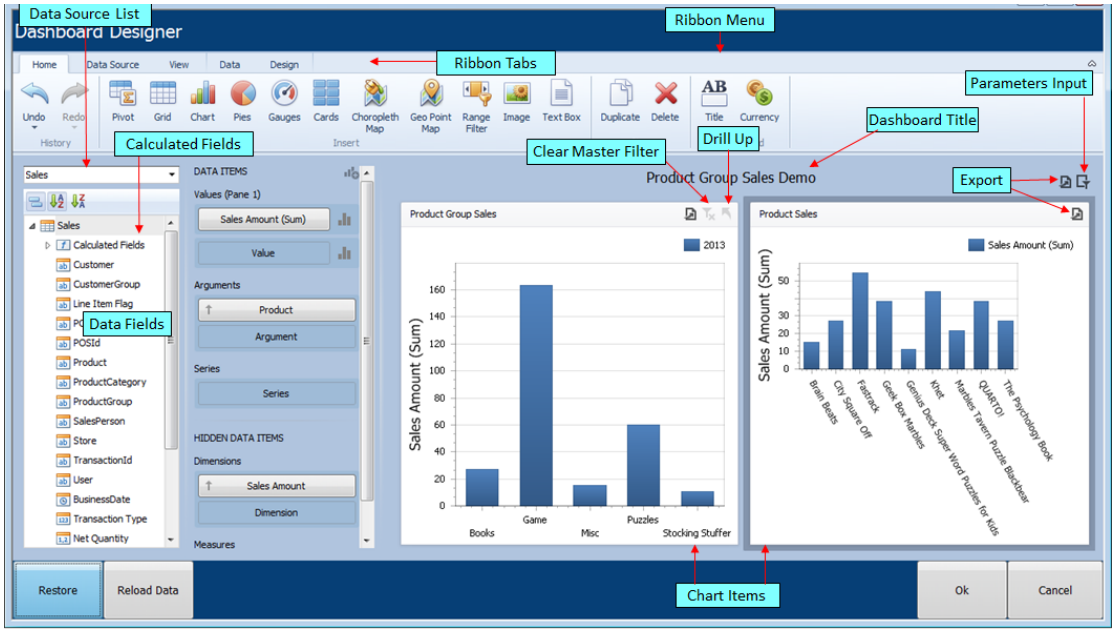
Setup Screen

Field	Description/Activity
Code	Enter the code of the dashboard. A unique code of maximum 30 alphanumeric characters can be entered.

Description	Enter the description of the dashboard. A description of maximum 100 alphanumeric characters can be entered.
Enabled	Whether this dashboard is enabled. (Only enabled dashboards will appear under *Reports > Dashboards*).
[Design Dashboard]	Opens the Dashboard Designer Window for designing the dashboard.
[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

Dashboard Designer Screen

Dashboard designer contains Ribbon menu, Data Source List, Field List, Dashboard for placing chart items.



Field	Description/Activity
Home tab (Ribbon menu)	
Undo	Cancels last activity like placing/deleting a Item on dashboard, moving.
Redo	Reverses the activitiesthat were canceledusing Undo.
Pivot, Grid, etc.	Adds selected dashboard item to dashboard. To move a chart item on dashboard drag it to place in required position.
Duplicate	Makes a copy of selected chart item and adds it to dashboard.
Delete	Removes selected chart item from dashboard.
Title	Shows dialog box to changes dashboard title text and other properties.
Currency	Shows dialog box to change currency currency, Currency culture.
Data Source tab (Ribbon menu)	
Add Calculated Field	Adds new calculated filed into current selected data source. Calculated fields can be used as a field.

Parameters	Edit the current dashboard parameters. Parameters can be used to specify values for filtering the data during viewing the dashboard.
Filter	Edit the current datasource filter. Using this data can be filtered based on a value, field, parameter. This filter applicable to selected dashboard item only. To apply filter for all dashboard items use filter on Data Source tab.
Clear	Clears the current datasource filter.
Data tab (Ribbon menu)	
Edit Filter	Specify criteria for data displayed in selected dashboard item, based on a value, field, parameter. This filter applicable to selected dashboard item only. To apply filter for all dashboard items use filter on Data Source tab.
Clear	Clears criteria for data displayed in selected dashboard item.
Single Master Filter	Enable Single Master Filter. When an element with the dashboard item selected, other dashboard items show only data corresponding to the selected element. (Either Single or Multiple Master Filter selected at a time).
Multiple Master Filter	Enable Multiple Master Filter. When multiple elements with the dashboard item selected, other dashboard items show only data corresponding to the selected elements. (Either Single or Multiple Master Filter selected at a time).
Drill Down	Enable Drill Down. Click an element within the dashboard item to display detailed data related to this element.
Cross-Data-Source Filtering	Make dashboard items that display data from other datasources affected by this Master Filter. In this instance, filtering is performed if the names of data items match.
Ignore Master Filters	Make this dashboard item unaffected by other Master Filters.
Arguments	Arguments are used to perform Master Filtering and drill-down.
Series	Series are used to perform Master Filtering and drill-down.
Design tab (Ribbon menu)	
Commands in this tab are specific to selected dashboard item, used to format the appearance of the dashboard item.	
Buttons	
[Full Screen]	Hides the menu from left side to increase display area for the designer, Button text changes to *Restore*.
[Restore]	Shows the menu from left side, Button text changes to *Full Screen*.
[Reload Data]	This button loads complete data for the selected and used data source(s). Initially sample data only will be loaded for designing the dashboard to avoid waiting time for loading complete data.

[OK]	The button updates changes to the database and closes the screen.
[Cancel]	The button does not save any changes and closes the screen.

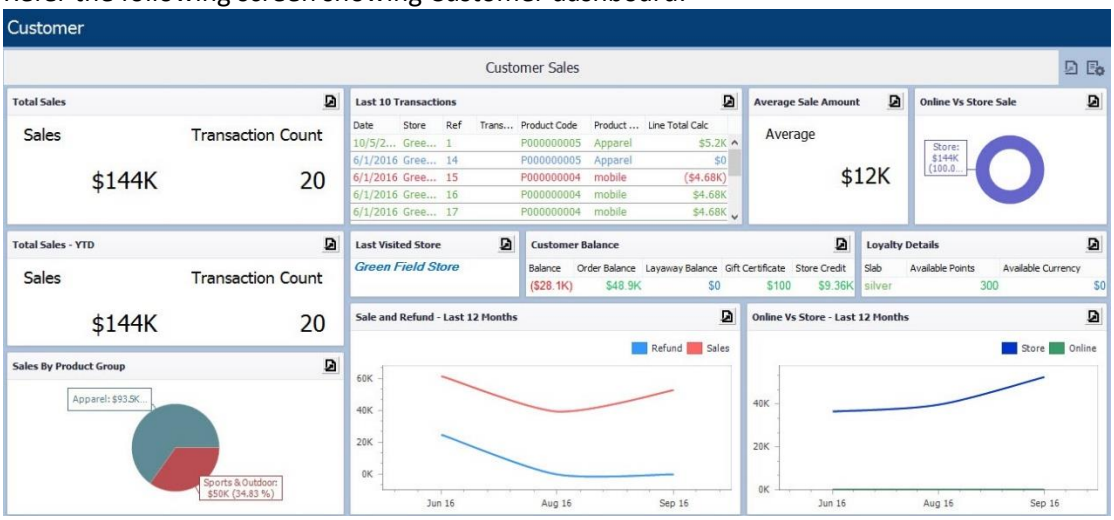
CUSTOMER DASHBOARD

The Customer Sales dashboard shows various information related to customer sales.
To open the **Customer** dashboard screen, browse through *Operations* > *Business Partner* > *Customer* and click the icon.

The Customer dashboard screen contains following sections:

- **Total Sales**: This section displays sales refund and transaction count values.
  - Sales Refund: This widget displays all sales data from the beginning with Transaction count.
  - Transaction count: This widget includes number of transactions for Sale, Refund, Order, and Layaway. Transaction count does not include Void, and Suspend Transaction values.
- **Total Sales YTD**: This section displays sale refund and transaction count values.
  - Sales Refund: This widget will display all sales data from the year to date with transaction count.
  - Transaction Count: This widget includes number of transactions for Sale, Refund, Order, and Layaway. Transaction count does not include Void, and Suspend Transaction values.
- **Sales By Product Group**: This widget displays sales by product group in pie graph.
- **Last 10 Transactions**: This widget displays last 10 transactions in grid view, which include Date, Store, Transaction No, Product Code, Description and Line Total.
- **Last Visited Store**: This widget displays the Last Transaction Store Name.
- **Customer Balance**: This Widget displays customer balances including Balance, Order Balance, Layaway balance, GC Balance, and Store Credit Balance. The GC Balance and Store Credit Balance are shown separately which include sum total of GC balance and sum total of store credit balance.
- **Sale and Refund – Last 12 Months**: This widget displays the sale and refund data month view with two-line graph. This widget displays the data only for the month in which sales /refunds are transacted.
- **Average Sale Amount**: This widget displays an average sales amount that is Total Sale Amount excluding refund/Number of sale Transaction excluding refund.
- **Loyalty Details**: This widget displays customer loyalty slab and loyalty points details. The Registration method customer code and loyalty card attached to customer code are only required.
- **Online Vs Store – Last 12 Months**: This widget displays online and retail store data with two-line graph in monthly manner. This widget displays data only for the month in which online sales /retail store actually happens.
- **Online Vs Store Sale**: This widget displays the eCommerce store sales versus Retail Store sales in pie chart.

Refer the following screen showing Customer dashboard:



Note:

- Click the **Close** button to return to the **Customer** screen.
- The **Customer** dashboard screen can be opened only from the **Customer** screen by clicking the  icon.

PRODUCT DASHBOARD

The Product dashboard shows various information related to product sales.

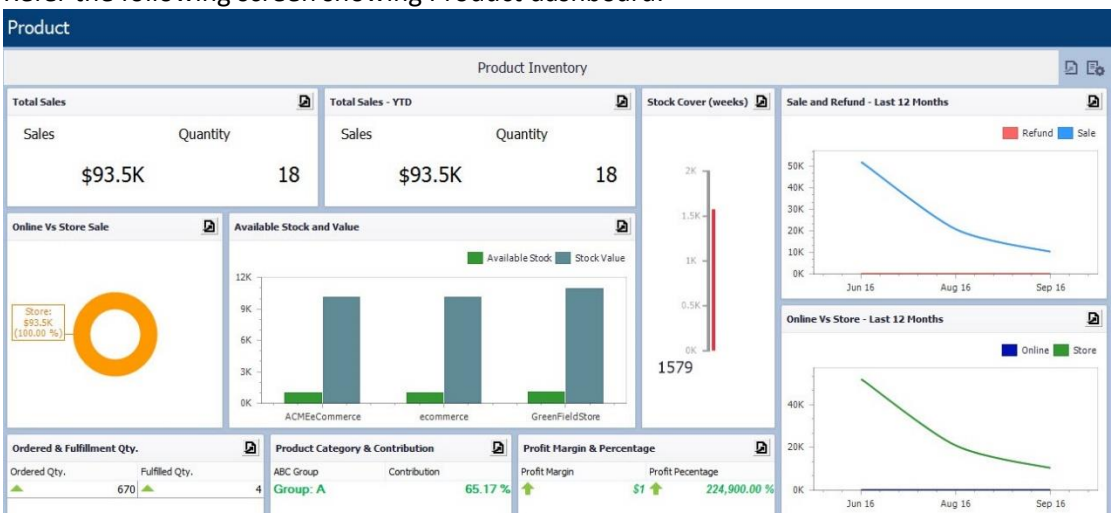
To open the **Product** dashboard screen, browse through *Operations > Business Partner > Product* and click the  icon.

The Product Inventory screen contains following sections:

- **Total Sales**:
  - Sales: This widget will display all sales data from the beginning with quantity sold.
  - Quantity: This widget displays net quantity sold which does not include the Void, and Suspend Transaction.
- **Total Sales - YTD**:
  - Sales: This widget will display all sales data from the year to date with quantity sold.
  - Quantity: This widget displays net quantity sold which does not include the Void, and Suspend Transaction.
- **Stock Cover (Weeks)**: This widget displays stock availability for the number of weeks. For example, if it shows 1579 then it means that the stock available in the store will last up to 1579 weeks.
- **Sale and Refund – Last 12 Months**: This widget displays the sale and refund data in monthly manner with two-line graph. This widget only displays the data of month in which sales /refund are transacted.
- **Online Vs Store – Last 12 Months**: This widget displays the online and retail store data monthly manner with two-line graph. This widget only displays the data of month in which online sales /retail store sale are transacted.
- **Online Vs Store Sale**: This widget displays the e-Commerce store sale versus retail store sale in pie chart.

- **Available Stock and Value**: This widget displays the store wise total product stock and total product value.
- **Ordered & Fulfillment Qty.**: This widget displays the ordered quantity, which includes open purchase order quantity and fulfillment quantity.
- **Product Category and Contribution**: This widget displays the product category and contribution where the product Category shows a group name under **ABC Group** using ABC Analysis and Contribution shows product contribution percentage using ABC Analysis.
- **Profit Margin and Percentage**: This widget displays the product profit margin value and percentage.

Refer the following screen showing Product dashboard:



Note:

- Click the **Close** button to return to the **Product** screen.
- The **Product** dashboard screen can be opened only from the **Product** screen by clicking the  icon.

POS Customization

Introduction

POS designer allows users in customizing iVend Retail Point of Sale (POS) in their own way making it the significant feature of iVend Retail 6.5.2.

This feature comes with six default templates with editing option available to the users allowing them to customize the default templates as well. Besides, users can create several new styles, button panels, and layouts based on their dynamic requirements. The default templates support RTL according to the geospecif requirements. For example, the template created in English culture shows RTL in Arabic culture.

For easy understanding, this user manual is categorized in following sections:

- **Button Style**
  This section describes about creating, editing, deleting, and viewing button styles in POS Designer. Button style allows you creating and customizing button styles such as font, color, background, setting image, transparency, and lots more.

- **Design Panel**
  This section describes about creating, editing, deleting, copying, viewing/previewing a panel design.

- **Layouts**
  This section describes about creating, editing, deleting, copying, viewing, and other important functionality of Layouts in POS Designer.

Button Style

Overview

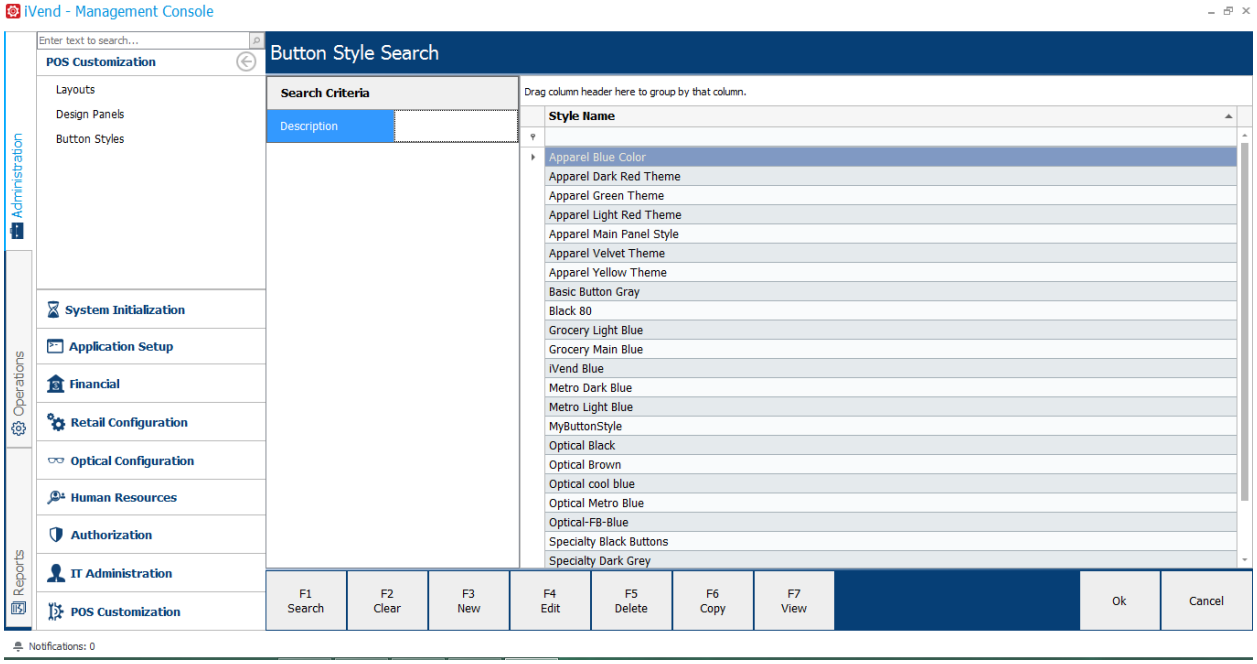
This section provides you detailed understanding about button style functionalities of POS Designer. Making you familiar with the Button Style screen, it covers all other important functionalities such as creating a new button style, editing a button style, deleting a button style, copying a button style, and viewing a button style.

Using the **Button Style** feature, you can create and set font, color, and image for a button that can be used while creating or editing a design panel.

Following topics covered in this section, click to explore:

Button Style Screen

To open the **Button Style Search** screen, browse through *Administration > POS Customization > Button Styles* in iVend Management Console. This screen shows all the available button Styles. The screen has a button panel containing *Search, Clear, New, Edit, Delete, Copy, and View* buttons to let users perform respective operation. Refer below illustration showing default **Button Style Search** screen.



Creating a New Button Style

This topic describes about how to create a new button style to be used in Design Panel and Layouts.

The Button Style Search screen contains list of button style from where you can simply select a style and edit it to save your own custom button style or copy a selected button style to create a new button style containing properties of the source button style.

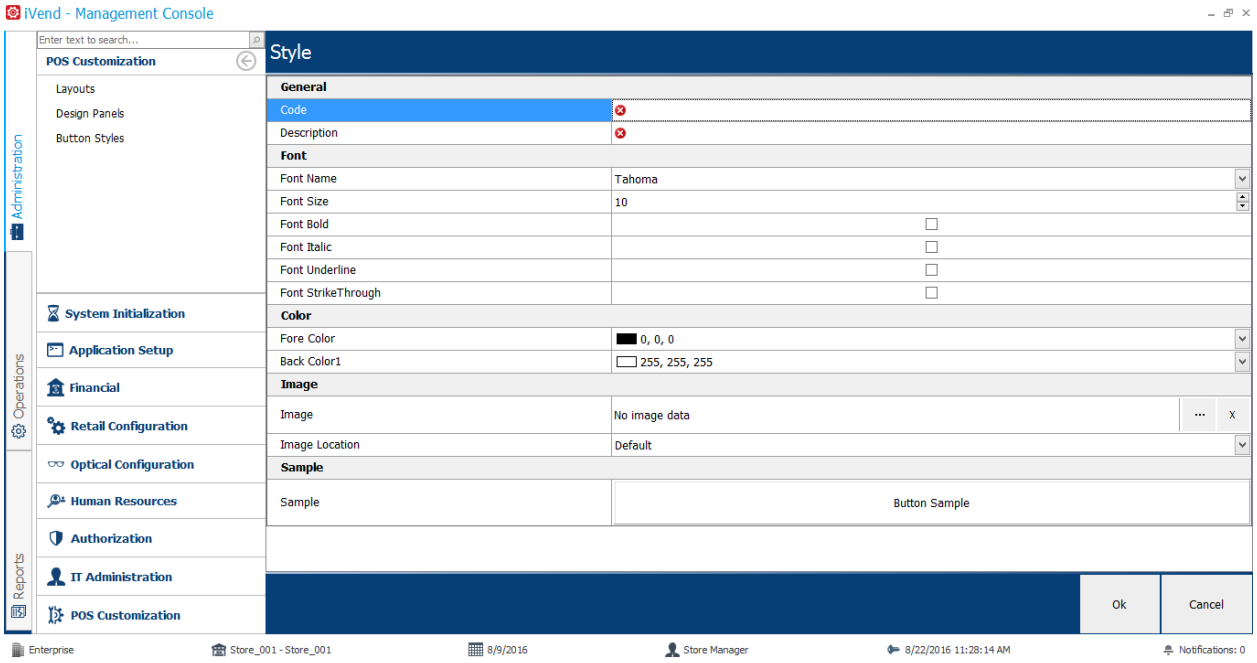
To create a new button style:

1. On the **Button Style Search** screen, click the **New** button or press **F3**.
   It opens the Style screen containing General, Font, Color, Image, and Sample sections.
2. Refer the following mentions helping you to provide appropriate information in the form.
   - **Code**: Enter a code for the button style. This field accepts an alphanumeric value.
   - **Description**: Enter a description for the button style. This field accepts an alphanumeric value.
   - **Font Name**: Choose a name from the **Font Name** list.
   - **Font Size**: Click the Up/Down button to increase/decrease the font size.
   - **Font Bold**: Select this checkbox to make font bold.
   - **Font Italic**: Select this checkbox to make font italic.
   - **Font Underline**: Select this checkbox to underline the font.
   - **Font StikeThrough**: Select this checkbox to strike through the font.

- **Fore Color:** Click anywhere on the **Fore Color** field to open the color picker and set the foreground color for the font. By default, it is set to the **Black** (0, 0, 0) color.
- **Back Color1**: Click anywhere on the **Back Color** field to open the color picker and set the foreground color for the font. By default, it is set to the **White** (255, 255, 255) color.
- **Image**: Click the … button to browse and select an image for the button background. You can click X button to remove the selected image for the button background.
- **Image Location**: Click the **Image Location** list to choose a location where you want to set the chosen image in the button background.
- **Sample**: This field shows the sample button style based on the properties you have set.

3. After setting all button properties, click the **Ok** button to create a button style. Clicking the **Cancel** button closes the **Style** page aborting the operation.
4. Now you can see the newly created button style on the **Button Style Search** screen.

Refer below illustration for the default Style screen.



Deleting a Button Style

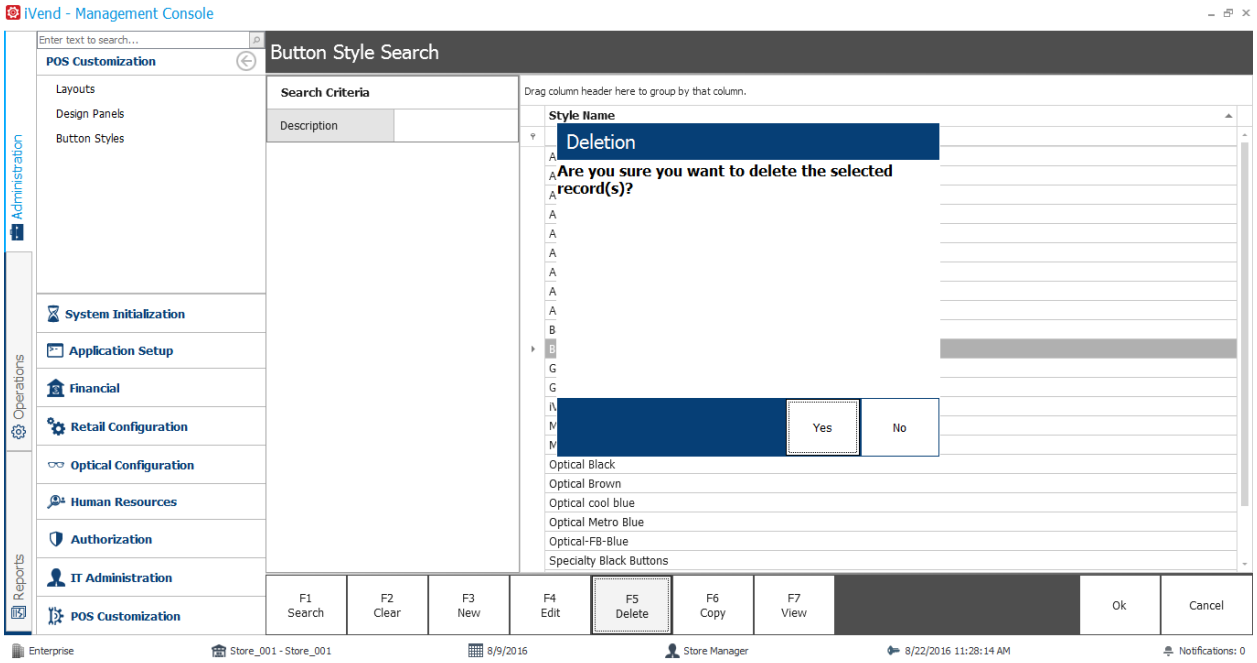
This section describes about how to delete a button style from the Button Style Search screen.

To delete a button style:

1. Browse through *Administration > POS Customization > Button Styles* to open the **Button Style Search** screen.
   The Button Style Search screen lists all available button styles.
2. Now select a button style which you want to delete.
3. Then click the **Delete** button or press **F5**. Click
   A message appears asking for you conformation to delete the selected record.
4. Click the **Yes** button to delete the button.
   Note: You cannot retrieve the button style once you delete it.

Note: The system does not allow you to delete the button style, if it is being associated with the Layout. In case of user trying to delete the button style that has been associated with the Layout, system prompts the error that "Style cannot be deleted as it is used by the system".

Below is the message that appears on clicking the delete button.



Copying a Button Style

This section describes about how to copy a button style. Copying a button style helps you create another button style where all the properties are preset according to the source button style.

To copy a button style:

1. Browse through *Administration > POS Customization > Button Styles* to open the **Button Style Search** screen.
   The Button Style Search screen lists all available button styles.
2. Select a button style which you want to copy.
3. Click the **Copy** button or press **F6**.
   It opens the **Style** screen with all fields preset (*except the Code field*) according to the source button style.
4. Now, enter a code in the **Code** field for the new button style.
5. Edit other properties and set new properties as the requirements demand.
6. Click the **Ok** button to save the new button style.
   You can now search for the newly created button style on the **Button Style Search** screen.

Viewing a Button Style

This section describes about viewing a button style. The **View** button opens the button style in view only mode which does not let you make any change to its properties.

To view a button style:

1. Browse through *Administration > POS Customization > Button Styles* to open the **Button Style Search** screen.
   The Button Style Search screen lists all available button styles.
2. Select a button style which you want to view.
3. Click the **View** button or press **F7**.
   It opens the Style screen in view only mode.
4. Click the **Cancel** button to close the screen and return to the **Button Style Search** screen.

Design Panel

Overview

This section describes about the Design Panel which contains a set of buttons to perform all the intended operations.

This section provides you detailed understanding about various functionalities of Design Panel. Making you familiar with the Design Panel screen, it covers all other important functionalities such as creating a new Design Panel, editing a Design Panel, deleting a Design Panel, copying a Design Panel, viewing a Design Panel, and previewing Design Panel.

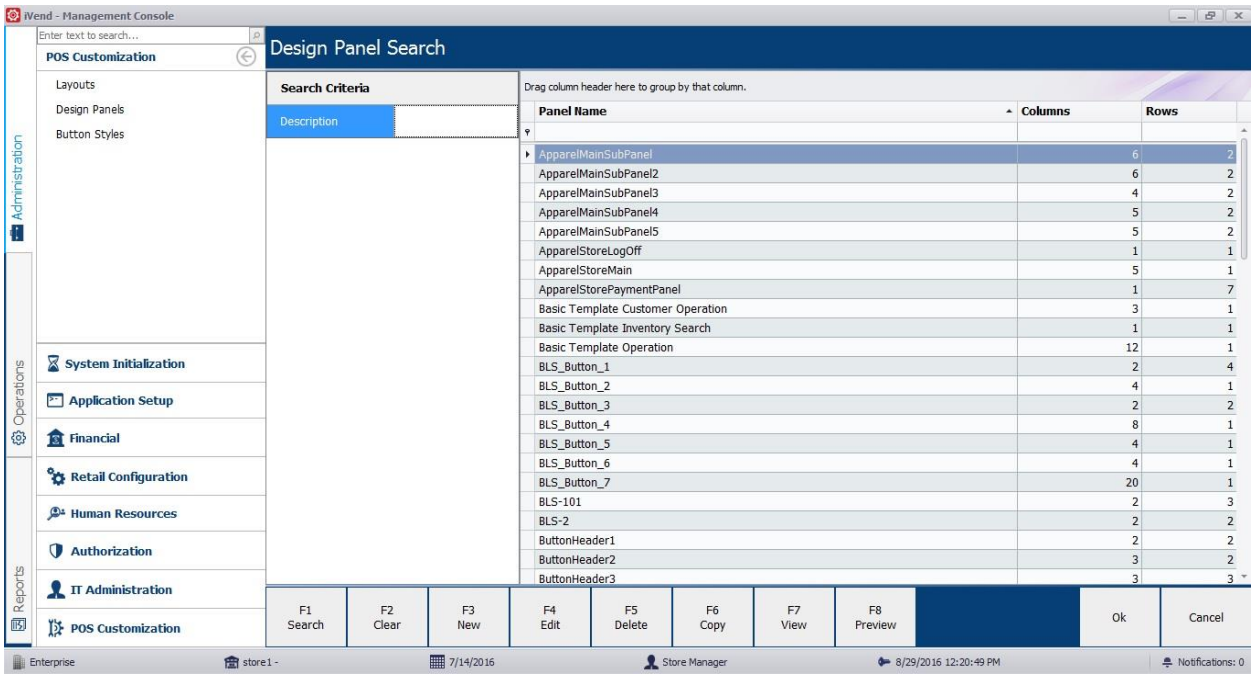
Using the **Design Panel** feature, you can create the matrix of buttons and associate operations to that buttons, along with that user can also set the style, margin and globalization for a button in Design Panel. It provides functionality to set the order of the button in the Design Panel as well.

There are following topics covered in this section, click to explore:

Screen Introduction (Design Panel)

To open the **Design Panel Search** screen, browse through *Administration > POS Customization > Design Panel* in iVend Management Console. This screen shows all the available Design Panels. The screen has a button panel containing *Search, Clear, New, Edit, Delete, Copy, View and Preview* buttons to let users perform respective operation.

Refer below illustration showing default **Design Panel Search** screen.



Creating a New Design Panel

This topic describes about how to create a new Design Panel to be used in the layouts.
The Design Panel Search screen contains list of button style from where you can simply select a Design Panel and edit it to save your own custom Design Panel or copy a selected Design Panel to create a new one containing properties of the source panel.

To create a new Design Panel:

1. On the **Design Panel Search** screen, click the **new** button or press **F3**.
   It opens the Design Panel Screen containing General section along with a grid below to display the Button Matrix. The screen has a button panel containing *Preview, First* , *Up* , *Down* *and Last* buttons to let user preview and adjust the button position in the Design Panel
2. Refer the following mentions helping you to provide appropriate information in the form.
   - **Id**: Enter an Id for the Design Panel. This field accepts an alphanumeric value.
   - **Description**: Enter a description for the Design Panel. This field accepts an alphanumeric value.
   - **Column**: Click the Up/Down button to increase/decrease the no. of column in button matrix.
   - **Row**: Click the Up/Down button to increase/decrease the no. of row in button matrix.
   - **Margin**: Click the Up/Down button to increase/decrease the margin between buttons in button matrix.
   - **Style**: Click the Select button to select the common style to be applied on buttons.

- **Back Color**: Set the Backcolor from Dropdown.

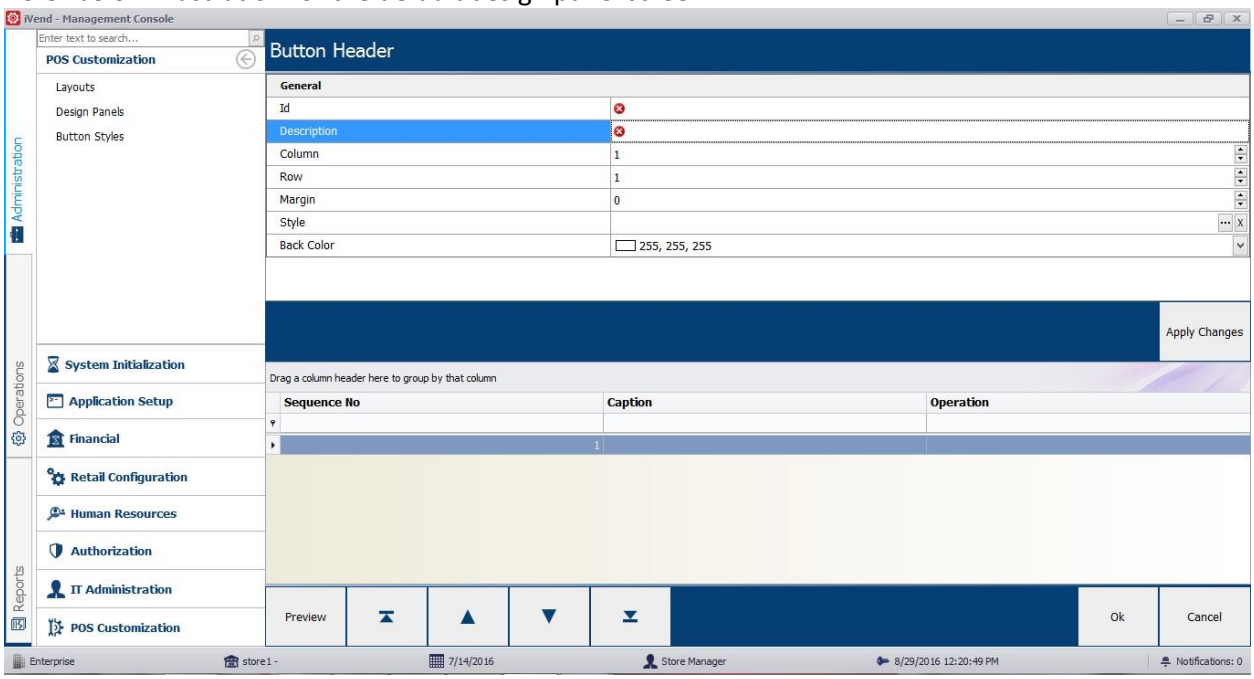
After setting all Design Panel properties, click the **Apply Changes** button to generate buttons with all the properties. Clicking on apply changes reflects the buttons down at below grid. With the use of all the button users can move the button position to Up/Down/First/Last in the button grid accordingly.

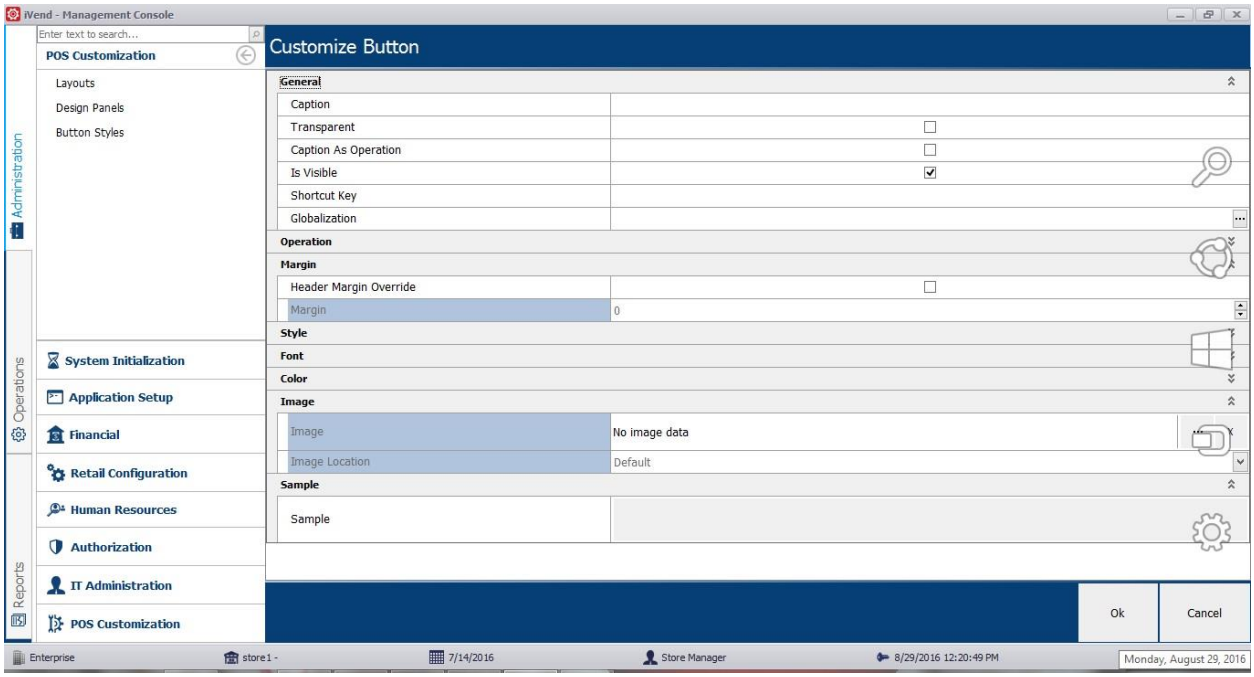
3. To Assign the Operation to each button user can double click on button to open the **Customize Button Screen**.
   This Screen containing General, Operation, Margin, Style, Font, Color, Image and Sample sections.
   Refer the following mentions helping you to provide appropriate information in the form.
   - **Caption**: Enter a caption to be shown for the button. This field accepts an alphanumeric value.
   - **Transparent**: Check/ Uncheck to set the button style transparent.
   - **Caption as Operation**: Check this field to make button caption name same as the Operation assigned to it.
   - **IsVisible**: Check to make button Visible/Invisible.
   - **Shortcut Key**: Enter a shortcut Key for the operation to be performed by the button.
   - **Globalization**: Set the Globalization caption for the button.
   - **Operation**: Select this Operation from the list in the dropdown to be assigned to the button.
   - **Header Margin Override**: Select this checkbox to override the margin set at the Design Panel level.
   - **Margin:** Click the Up/Down button to increase/decrease the Margin.
   - **Style**: Click the Select button to select the common style to be applied on buttons.
   - **Font Name**: Choose a name from the **Font Name** list.
   - **Font Size**: Click the Up/Down button to increase/decrease the font size.
   - **Font Bold**: Select this checkbox to make font bold.
   - **Font Italic**: Select this checkbox to make font italic.
   - **Font Underline**: Select this checkbox to underline the font.
   - **Font StikeThrough**: Select this checkbox to strike through the font.
   - **Fore Color**: Set the Forecolor for the button caption.
   - **Back Color**: Set the back color for the button caption
   - **Image**: Set the background Image for the Button.
   - **Image Location**: Click the **Image Location** list to choose a location where you want to set the chosen image in the button background.
   - **Sample**: This field shows the sample button style based on the properties you have set.

   Click the **Ok** button to save the customization for the button and you are back to **Design Panel screen**.
   Clicking the **Cancel** button closes the **Customize button** page aborting the operations.
4. Now you can see the Preview of all the button style in button matrix by clicking Preview button on **Design Panel Search** screen.
5. Click the **Ok** button to save the new Design Panel.

6. You can now search for the newly created Design Panel on the **Design Panel Search** screen.

Refer below illustration for the default design panel screen.





Editing a Design Panel

This section describes about how to edit a Design Panel. Editing a design panel allows you edit the design of the panel by editing the no. or rows and columns associated with it and editing the operations associated with the buttons and change the order of the buttons in the panel.

To edit a design panel:

1. Browse through *Administration > POS Customization > Design Panel* to open the **Design Panel Search** screen.
   The Design Panel Search screen lists all available Design panel.
2. Select a Panel which you want to Edit.
3. Click the **Edit** button or press **F4**.
   It opens the **Design Panel** screen with all fields preset.
4. Now, change the specific field you want to change and click on apply changes for the changes to get applied on the grid.
5. To edit a particular button style or operation, Double Click on button in the grid.
   It opens the **Customize Button** screen with all preset of the buttons.
6. Click the **Ok** button to save the new button style and operation.
7. Click on **Ok** button on design panel screen to save the changes made.

Deleting a Design Panel

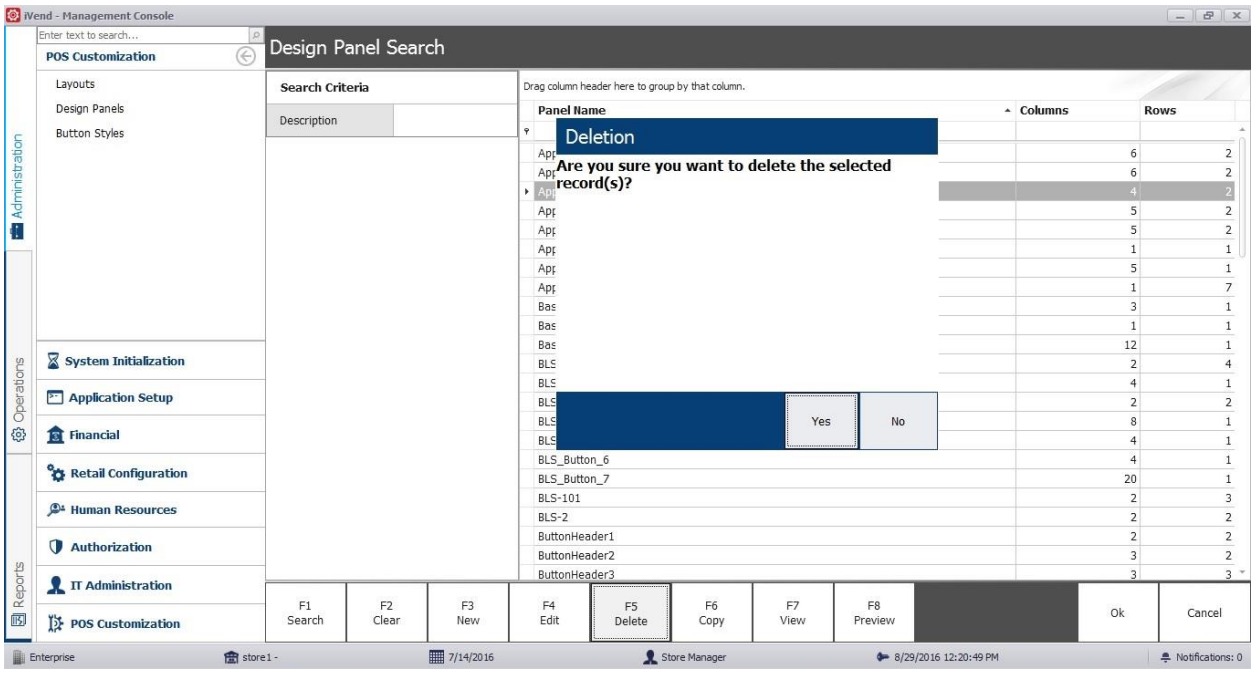
This section describes about how to delete a Design Panel from the Design Panel Search screen.

To delete a design panel:

1. Browse through *Administration > POS Customization > design panel* to open the **Design Panel Search** screen.
   The design Panel Search screen lists all available Design Panels.
2. Now select a Panel which you want to delete.
3. Then click the **Delete** button or press **F5**. Click
   A message appears asking for you conformation to delete the selected record.
4. Click the **Yes** button to delete the button.
   Note: You cannot retrieve the Design Panel once you delete it.

Note: The system does not allow you to delete the Design Panel, if it is being associated with the Layout. In case of user trying to delete the Design Panel that has been associated with the Layout, system prompts the error that "*Button Header cannot be deleted as it is used by the system*".

Below is the message that appears on clicking the Delete button.



Copying a Design Panel

This section describes about how to copy a design panel. Copying a design panel helps you create another design panel where all the properties are preset according to the source design panel.

To copy a design panel:

1. Browse through *Administration > POS Customization > design panel* to open the **Design Panel Search** screen.
   The Design Panel Search screen lists all available design panels.
2. Select a design panel which you want to copy.
3. Click the **Copy** button or press **F6**.
   It opens the **design panel** screen with all fields preset (*except the Id*) according to the source design panel.
4. Now, enter an Id in the **Id** field for the new design panel.
5. Edit other properties and set new properties as the requirements demand.
6. To Edit the Properties and operations of the button in the panel, go to customize button screen by double clicking on button.
7. Edit the properties and operation for the button and click ok to save and to get back to design panel screen.
8. Click the **Ok** button to save the new design panel.
   You can now search for the newly created design panel on the **Design Panel Search** screen.

Viewing a Design Panel

This section describes about viewing a Design Panel. The **View** button opens the design panel in view only mode which does not let you make any change to its properties.

To view a design panel:

1. Browse through *Administration > POS Customization > design panel* to open the **design panel Search** screen.
   The design panel Search screen lists all available design panels.
2. Select a design panel which you want to view.
3. Click the **View** button or press **F7**.
   It opens the design panel screen in view only mode.
4. Click the **Cancel** button to close the screen and return to the **Design Panel Search** screen.

Previewing a Design Panel

This section describes about previewing a Design Panel. The **Preview** button opens the preview of the design panel with all styles applied on it.

To preview a design panel:

1. Browse through *Administration > POS Customization > design panel* to open the **design panel Search** screen.
   The design panel Search screen lists all available design panels.
2. Select a design panel which you want to view.
3. Click the **Preview** button or press **F8**.
   It opens the preview of the Design Panel.
4. Click the **OK** button to close the screen and return to the **Design Panel Search** screen.

Reordering a Design Button Sequence

This section describes about reordering of the button associated with a Design Panel. The **Edit** button opens the design panel screen in edit mode to reorder the buttons.

To reorder buttons in design panel:

1. Browse through *Administration > POS Customization > Design Panel* to open the **Design Panel Search** screen.
   The Design Panel Search screen lists all available Design panel.
2. Select a Panel which you want to edit.
3. Click the **Edit** button or press **F4**.
   It opens the **Design Panel** screen with all fields preset.
4. **Design Panel** screen has a button panel containing *Preview, First*, *Up*, *Down* *and Last* buttons to let user preview and adjust the button position in the Design Panel.
5. Select the button in the grid and click on the icon buttons to set the position to Up/Down/First/ Last.
6. Click the **OK** button to close the screen and return to the **Design Panel Search** screen.

Layouts

Overview

This section provides you detailed understanding about Layout Designing functionalities of POS Designer. Making you familiar with the Layout screen, it covers all other important functionalities such as creating a new Layout, editing an existing Layout style, deleting a Layout, copying a Layout, viewing a Layout and Importing Exporting of the Layout.

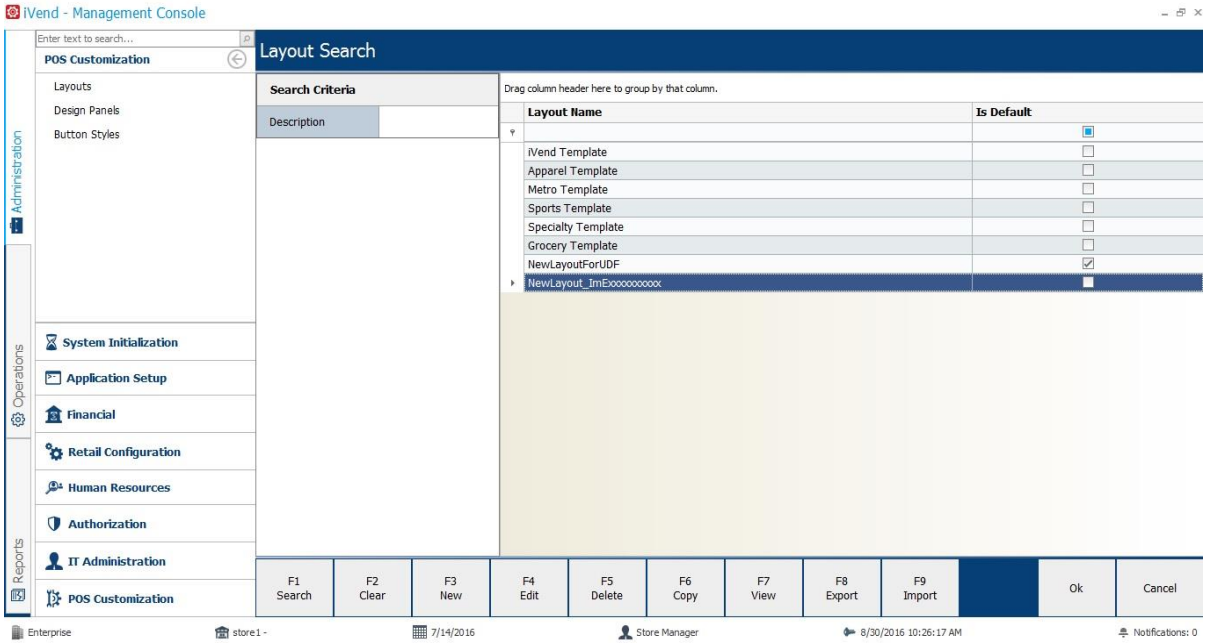
Using the **Layout** feature, you can design a Layout by placing all the control and design panels to the canvas easily.

There are following topics covered in this section, click to explore:

- Screen Introduction(Layout)
- Creating a New Layout
- Editing a Layout
- Deleting a Layout
- Copying a Layout
- Viewing a Layout
- Using POS Designer and Customization
- Syncing Updated Layout with iVend Retail POS

Screen Introduction (Layouts)

To open the **Layout Search** screen, browse through *Administration > POS Customization > Layout* in iVend Management Console. This screen shows all the available layouts in the system. The screen has a button panel containing *Search, Clear, New, Edit, Delete, Copy, View, Export and Import* buttons to let users perform respective operation. Refer below illustration showing default **Layout Search** screen.



Creating a New Layout

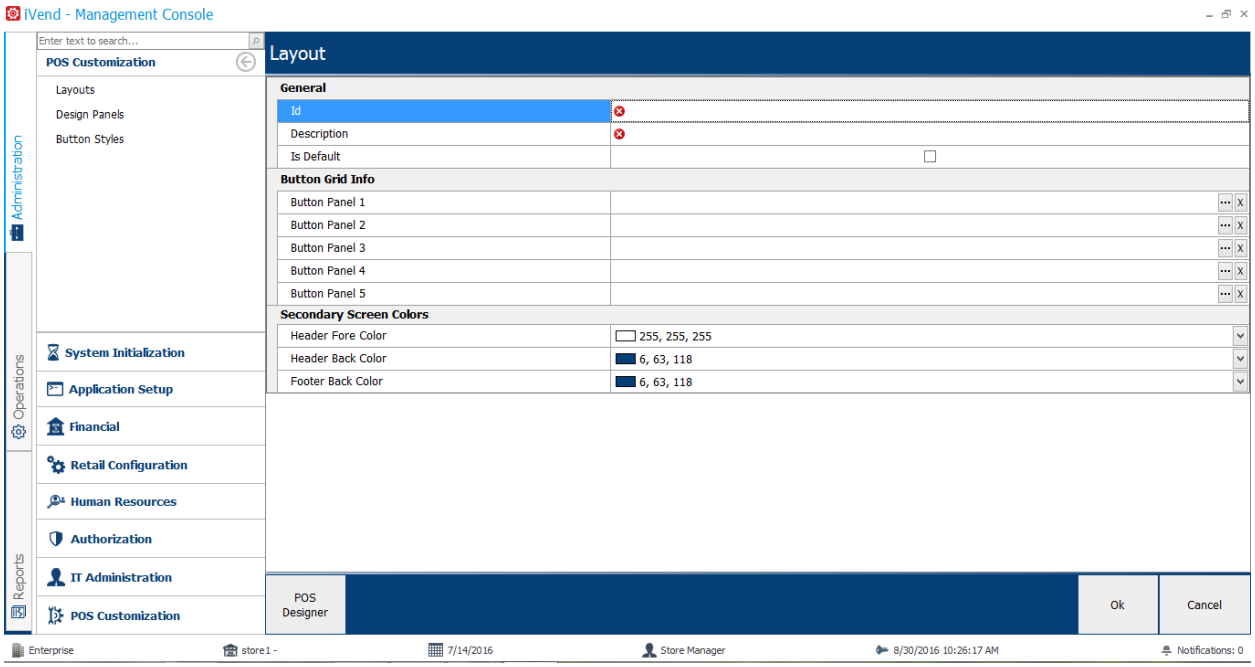
This topic describes about how to create a new layout.
The Layout Search Screen contains list of Layout from where you can simply select a Layout and edit it to save your own custom Design Layout or copy a selected layout to create a new layout containing properties of the source layout.

To create a new layout:

1. On the **Layout Search Screen**, click the **new** button or press **F3**.
   It opens the Layout Screen containing General section along with Button Grid Info and Secondary Screen Colors. The screen has a button panel containing *POS Designer* button to let user go to canvas and design the Layout.
2. Refer the following mentions helping you to provide appropriate information in the form.
   - **Id**: Enter an Id for the layout. This field accepts an alphanumeric value.
   - **Description**: Enter a description for the layout. This field accepts an alphanumeric value.
   - **Is Default**: Select this checkbox to set it as default layout for Retail Config.
   - **Button Panel 1**: Click the Lookup button to select the Button Grid to associate with the Layout.
   - **Button Panel 2, 3, 4, 5**: Similarly you can select more Button Grid to associate with the Layout.
   - **Header Fore Color**: Click to select the Header Fore Color for the Secondary Color.
   - **Header Back Color**: Click to select the Header Back Color for the Secondary Color.
   - **Footer Back Color**: Click to select the Footer Back Color for the Secondary Color.

After setting all Layout properties, click the **POS Designer** button to design the layout using all the Button Grid associated with it. Without going to POS Designer clicking the **Ok** button saves the layout with the default layout design.

Refer below illustration for the default layout screen.



EDITING A LAYOUT

This section describes about how to edit an existing Layout. Editing a Layout allows you to edit the Layout by changing the button grid associated Layout, changing the Backcolor and forecolor for the header and footer for the secondary screen and change the layout design by going to canvas using POS designer button.

To edit a layout:

1. Browse through *Administration > POS Customization > Layout* to open the **Layout Search** screen.
   The Layout Search screen lists all available Layout Design available.
2. Select a Layout which you want to edit.
3. Click the **Edit** button or press **F4**.
   It opens the **Layout** screen with all fields preset.
4. Now, change the specific field or properties you want to change.
5. To Edit the Design of the layout click on POS designer button and go to Layout Design canvas.
6. Drag and Drop the control from place them accordingly.
7. Click the Ok button takes you back to the Layout Screen while Cancel click aborts the changes you have made.
8. Click the **Ok** button on Layout screen to save the changes made.

Deleting a Layout

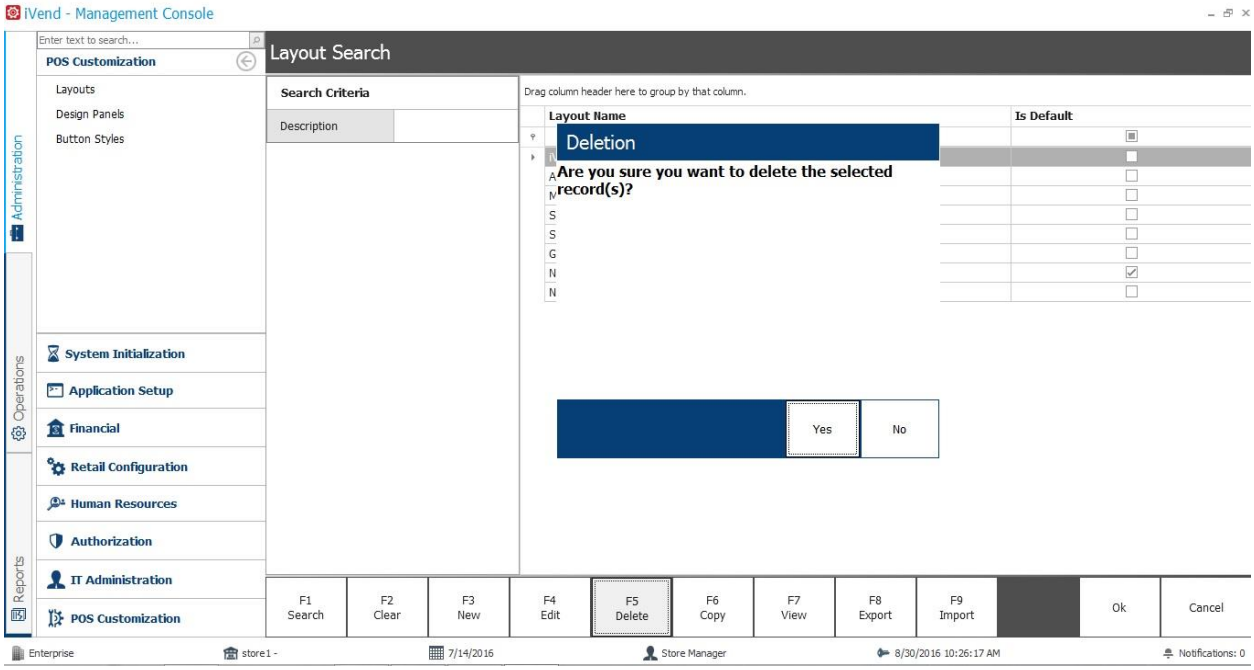
This section describes about how to delete a Layout from the Layout Search screen.

To delete a layout:

1. Browse through *Administration > POS Customization > Layout* to open the **Layout Search** screen.
   The Layout Search screen lists all available layouts.
2. Now select a Layout which you want to delete.
3. Then click the **Delete** button or press **F5**. Click
   A message appears asking for you conformation to delete the selected record.
4. Click the **Yes** button to delete the button.
   Note: You cannot retrieve the Layout once you delete it.

Note: The system does not allow you to delete the Layout, if it is being associated with the Layout. In case of user trying to delete the Design Panel that has been associated with the Layout, system prompts the error that "Button Header cannot be deleted as it is used by the system".

Below is the message that appears on click the delete button.



Copying a Layout

This section describes about how to copy a Layout. Copying a Layout helps you create another Layout Design where all the properties are preset according to the source Layout.

To copy a Layout:

1. Browse through *Administration > POS Customization > Layout* to open the **Layout Search** screen.
   The Layout Search screen lists all available layouts.
2. Select a Layout which you want to copy.

3. Click the **Copy** button or press **F6**.
   It opens the **Layout** screen with all fields preset (*except the Id*) according to the source Layout.
   Note: In case of Copy, **Button grid** in the Layout from the source Layout is not copied, only the design of the layout is copied from the source layout.
4. Now, enter an Id in the **Id** field for the new Layout.
5. Associate all the button grid properties for the layout as per the requirement.
6. To Edit the Layout Design, go to Layout Designer canvas by clicking on POS Designer button.
7. Click the Customization Button to open the customization window.
8. Drag and Drop the controls to place on the canvas.
9. Clicking the Ok button saves your Layout and takes you to layout screen while Cancel aborts the changes.
10. Click the **Ok** button on Layout Screen to save the new Layout.
    You can now search for the newly created Layout on the **Layout Search** screen.

Viewing a Layout

This section describes about the viewing a Layout. The **View** button opens the Layout in view only mode which does not let you make any change to its properties.

To view a layout:

1. Browse through *Administration > POS Customization > Layouts* to open the **Layout Search** screen.
   The Layout Search screen lists all available layouts.
2. Select a Layout which you want to view.
3. Click the **View** button or press **F7**.
   It opens the Layout screen in view only mode.
4. Click the **Cancel** button to close the screen and return to the **Layout Search** screen.

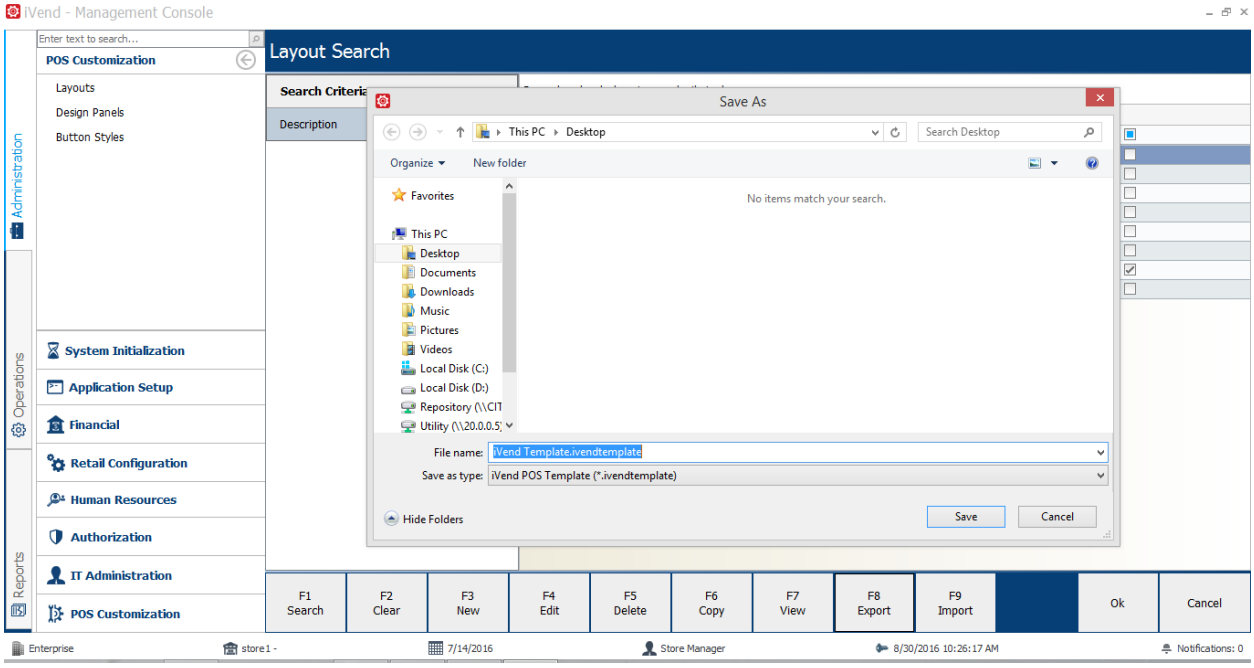
Exporting a Layout

This section describes about the Exporting of a Layout. The **Export** button opens the browser window to select the location where the exported file get saved. The exported file is getting saved as (iVend POS Template) '`.ivendtemplate`' format and the default name of the file is the name of the template.

To export a layout:

1. Browse through *Administration > POS Customization > Layouts* to open the **Layout Search** screen.
   The Layout Search screen lists all available layouts.
2. Select a Layout which you want to export.
3. Click the **Export** button or press **F8**.
   It opens the Browser Window to select the location where layout is to be saved.
4. Click the **Save** button to save the layout in '*.ivendtemplate*' format.
5. A message appears in the header that '*Selected layout has been exported successfully*'.

Below is the message that appears in when user clicks on export button.



IMPORTING A LAYOUT

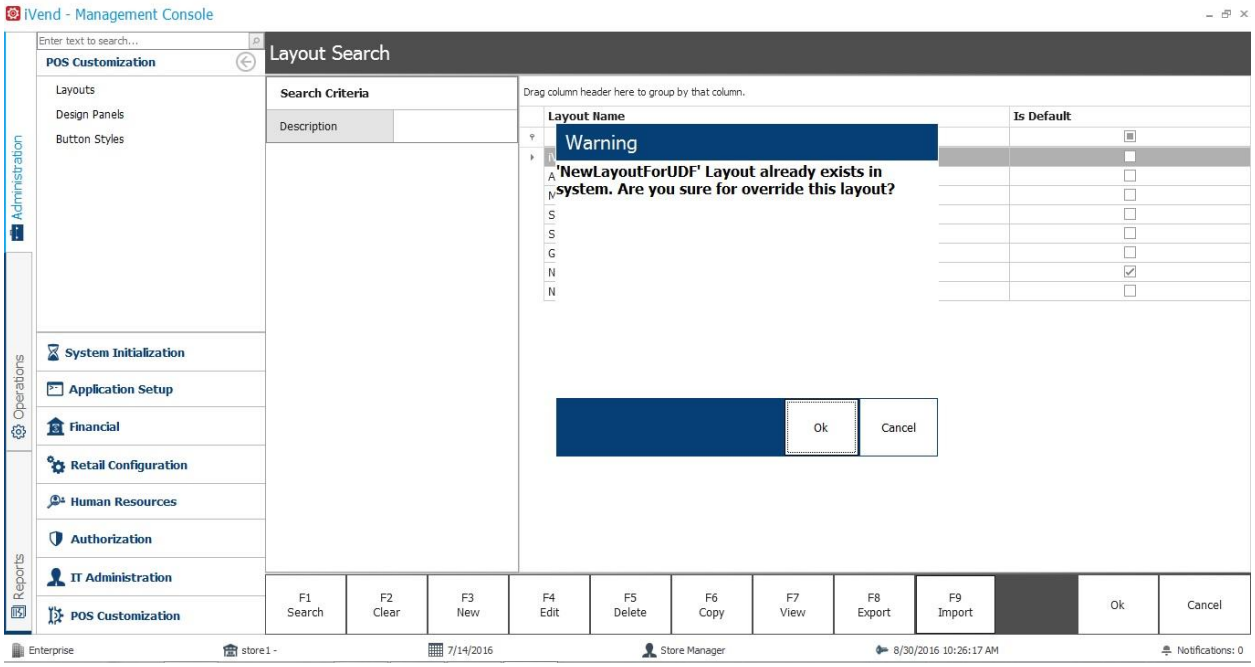
This section describes about the Importing of a Layout. The **Import** button opens the browser window to select the Layout from any location to be imported. The Layout file should be in (iVend POS Template) '*.ivendtemplate*' format.

To Import a layout:

1. Browse through *Administration > POS Customization > Layouts* to open the **Layout Search** screen.
   The Layout Search screen lists all available Layouts.
2. Select a Layout which you want to import.
3. Click the **Import** button or press **F9**.
   It opens the Browser Window to select the Layout of '.ivendtemplate' format from any location.
4. Click the **Open** button to export the layout.
5. A message in the header appears that '*Layout imported successfully*'.
6. Layout export is now available in the **Layout Search Screen.**

Note: The system prompts a message if you try to import a Layout which already exists, System compares for the layout on the basis of **Id** not on the basis of the name of the Layout.

Below is the message that appears in case of importing an existing Layout.



Using POS Designer and Customization

Overview

This section provides you detailed understanding about designing of the Layout that basically deals in placing the control over the canvas, moving and dragging the controls and the button grids. Making you familiar with the designing a specific control in the canvas, changing the forecolor and Backcolor of the caption and value of the control, setting up the header back color, directly editing the buttons and button grid from the designer screen.
Using the POS Designer and Customization feature, you can design a Layout by placing all the control, design panels over the canvas easily.
There are following topics covered in this section, click to explore:

- Placing the control to the canvas
- Adding Items in a particular control
- Setting of the Header control

Placing the control to the Canvas

This section describes about how to edit an existing Layout. Editing a Layout allows you to edit the Layout by changing the button grid associated Layout, changing the Backcolor and forecolor for the header and footer for the secondary screen and change the layout design by going to canvas using POS designer button.

To place the control over the canvas:

1. Browse through *Administration > POS Customization > Layout* to open the **Layout Search** screen.
   The Layout Search screen lists all available Layout Design available.
2. On the **Layout Search Screen**, click the **new** button or press **F3**.
   It opens the **Layout** screen with all fields blank.
3. Now, after setting all the properties of the layout screen click on POS Designer button to go to Canvas.
4. Button Grid on canvas contains Customization button. Click on Customization button to open customization window.
   All the controls and associated button grids is available at the customization window.
5. You can drag the control and button panel to the designer window from customization window by selecting and dragging the control.
   The control which is not required in the default design of the layout can be dragged back to the customization window.
6. Close the customization window to see the Layout. Click the **Ok** button to save the layout and get back to Layout Screen.
   Clicking the Cancel button aborts the changes.
7. Click the **Ok** button on the Layout screen to save the changes.

Adding fields in a particular control

This section describes about add fields to a control. User can add/remove multiple fields from a particular control by simply dragging and dropping the fields to the control.

To add/remove fields of a control:

1. Browse through *Administration > POS Customization > Layout* to open the **Layout Search** screen.

The Layout Search screen lists all available Layout Design available.

2. On the **Layout Search Screen**, click the **new** button or press **F3**.
   It opens the **Layout** screen with all fields blank.
3. Now, after setting all the properties of the layout screen click on POS Designer button to go to Canvas.
4. After dragging the control to the designer window, right click on the Control and then click on the **customize layout**.
5. Customization window gets open and you have all the properties related to that control in that customization window.
6. You can drag fields from the customization window to control and vice-versa.
7. Close the customization window and click **Ok** to get back to Layout screen. Click on cancel button aborts the changes
8. Click the Ok button of Layout screen to save the changes.

Setting of the Header Control

This section describes about how to set the background color and background image of the header control.

To customize the header control a layout:

1. Browse through *Administration > POS Customization > Layout* to open the **Layout Search** screen.
   The Layout Search screen lists all available Layout Design available.
2. On the **Layout Search Screen**, click the **new** button or press **F3**.
   It opens the **Layout** screen with all fields blank.
3. Now, after setting all the properties of the layout screen click on POS Designer button to go to Canvas.
4. Right Click on the header control to open the options available to customize the Header control.
5. Click on Customize Header to set the background image of the header control.
6. Click on Load image to set the Background image of the header.
   It opens the browser window to select the image to be set.
7. After selecting the background image for the header click on **Ok to** get back to the Layout Screen.
8. Click the Ok button of Layout screen to save the changes.

Syncing Updated Layout with iVend Retail POS

This section describes about how to synchronize the Layout in iVend Retail POS and Management Console. Change in the layout in Management Console get reflected to the iVend POS.

To Sync *Change in Layout* with iVend POS:

1. Browse through *Administration > Retail Configuration > Retail Profile* to open the **Retail Profile Search** screen.
   The Retail Profile Search screen lists all available Retail Profiles available.
2. To change the Layout associated with Retail Profile, select the retail profile from the list in **Retail Profile Search** screen.

3. Click the **Edit** button or press ***F4*** to open the Retail Profile in edit mode.
   It opens the **Retail Profile** Screen with all fields preset.
4. Now, at the bottom of General Section, you have the column named 'POS Layout'.
5. Click the Lookup button to open the **Layout Search** screen to select the layout.
6. After selection the Layout, Click the **Ok** button of Retail Profile screen to save the changes made.
7. To Sync the Change in Layout with iVend POS, Click on the Image Icon on the left side of the Header Control.
   This opens the POS **User Menu** Screen.
8. In the **POS Operation** Section, Click on the **Restore Layout** Button.
   This button Changes the Layout associated with the POS.
9. Click the **Ok** button of **User Menu** screen to see the changes in **Transaction Entry View** Screen.

Note: The system selects the Layout for iVend POS on the basis of Retail Profile associated with the below hierarchy.
Employee → POS → Store → Enterprise

The System first searches for the Layout assigned with retail profile associated with the Employee who is logged in, if found then it considers the Layout for the iVend POS, if not then it goes to above hierarchy and searches the same for the POS and so on.

POS Operation Events

There are following POS Operation on which events can be associated:

Sr. No.	Operation Name	Description	Parameter 1	Parameter 2
1.	No Operation	This Operation specifies that user does not want to perform any operation on click of this button		
2.	Item Sale	This operation would allow user to associate a product for sales with this button. Clicking on this button will add associated item in the sale.	Product: Select the product which is to be added to the transaction.	
3.	Void Item	Clicking on this button would remove the selected transaction item from the current transaction.		

4.	Item Comment	Item comment operation would open the comments screen for user to enter the comment for the selected transaction item.		
5.	Price Override	Price override operation opens price control for user to change the item price as POS.		
6.	Set Quantity	Set Quantity operation opens a quantity control for changing the quantity of the selected item.		
7.	Loyalty Customer Search	This operation is used to show the loyalty card details.		
8.	Customer Loyalty Information	Clicking on button having this operation, shows the loyalty details of the customer.		
9.	Pay By Cash	Pay By Cash button operation is used for making payment by Cash Payment Type.		
10.	Pay By Credit Card	Pay By Credit Card operation is used for making payment by credit card.		
11.	Pay Customer Account	This operation is used when a transaction is completed with OnAccount payment option. This payment option is not allowed for cash customers.		
12.	Pay By Currency	This operation is used to take the payment from the customer using the foreign currency payment type.		
13.	Pay By Loyalty	This operation is used to take the payment from the loyalty payment type.		

14.	Line Discount Amount	Clicking on the button having this operation would open the discount control. The control will allow user to input the discount amount for the selected line item.		
15.	Line Discount Percent	Clicking on the button having this operation would open the discount control. The control will allow user to input the discount percent for the selected line item.		
16.	Total Discount Amount	Clicking on the button having this operation would open the discount control. The control will allow user to input the discount amount for the current transaction.		
17.	Total Discount Percent	Clicking on the button having this operation would open the discount control. The control will allow user to input the discount percent for the current transaction.		
18.	Customer Add	Clicking the button having this operation will open a customer add form.		
19.	Inventory Lookup	This operation is used for inventory lookup. Inventory lookup, helps user in getting the stock status across the retail chain.		
20.	Select Transaction Mode	Clicking the button having this operation will allow user to change the Transaction Mode.		
21.	Customer Search	Clicking this operation opens the customer search view screen.		
22.	Product Search	Clicking this operation opens the product		

		search screen for selecting the product from the list.		
23.	Sale Edit	Clicking this operation opens the sale edit view screen.		
24.	Item Edit	Clicking this operation opens the item edit view for editing an item.		
25.	Transaction Search	Clicking this operation opens the transaction search view screen.		
26.	TransactionMode-FulFillment	This operation enables users to search for the fulfilment plan(s) setup in iVend Management Console. The user at POS can select a plan to be attached to the product(s) in the transaction.		
27.	Quick Complete-Cash	Clicking this operation completes the transaction using Cash as tender type.		
28.	Payments	Clicking this operation opens the available payment options.		
29.	TransactionMode-Sale	Clicking this operation changes the transaction mode to 'Sale'.		
30.	TransactionMode-SaleRefund	Clicking this operation changes the transaction mode to 'Sale Refund'.		
31.	TransactionMode-SaleExchange	Clicking this operation changes the transaction mode to 'Sale Exchange'.		
32.	TransactionMode-SpecialOrder	Clicking this operation changes the transaction mode to 'Special Order'.		
33.	TransactionMode-AdvancePayment	Clicking the button having this operation, opens the Advance Payment screen. This screen allows user to specify the Advance		

		amount to be taken for the special order.		
34.	Transaction Mode-Layaway	Clicking this operation changes the transaction mode to 'Layaway'.		
35.	Transaction Mode-Quotation	This button operation changes the transaction mode to 'Quotation'.		
36.	TransactionMode-GiftCertificate	This button operation opens the Gift Certificate Information screen which allows user to search for the issued gift certificates and then perform the transaction against it.		
37.	TransactionMode-CouponIssue	Clicking this operation opens the Coupon Item Information screen.		
38.	Void Current Transaction	Clicking this operation voids the current sale.		
39.	X-Tape Report	This button operation would open the X-Tape Report.		
40.	New Scan	This button operation is used to trigger a new scan event. This is used in case a use would lie to record the scanned item as a separate item in the transaction.		
41.	Show Scanned Transactions	This button operation is used for opening the Scanned Transactions.		
42.	Expense	Clicking this operation opens the Expense screen to capture the expense details done at POS.		
43.	Time Clock	This button operation, opens 'Time Clock' screen where user can break in/break out, check in/check out.		

44.	Kit Build/Break	This operation opens the Kit Build\Break screen from which user can build or break a kit.		
45.	Hardware Details	This operation opens the list of hardware connected to the POS machines.		
46.	Reinitialize Hardware	This operation reinitialize the attached hardware to the POS.		
47.	Start/Stop Manager Override	This operation opens the Login screen to start/stop manager authentication.		
48.	Lock POS	Clicking this operation Lock POS.		
49.	System Information	This button operation open the POS information for the system debug.		
50.	Log Out	Clicking this operation logs out the current user.		
51.	Shutdown Terminal	Clicking this operation closes the POS terminal.		
52.	Manage Tills	Clicking this operation shows the Till selection screen.		
53.	Open Cash Drawer 1	This button operation opens the cash drawer 1.		
54.	Open Cash Drawer 2	This button operation opens the cash drawer 2.		
55.	Cash In	Clicking this operation opens the Cash In screen.		
56.	Cash Out	Clicking this operation opens the Cash Out screen.		
57.	Z Report-Date Range	Clicking this operation opens the Z Report by date parameter.		
58.	Z Report-Number Range	Clicking this operation opens the Z Report by		

		number range parameter.		
59.	Suspend\Recall Transaction	Clicking this operation suspends the current transaction.		
60.	Hardware Setup	This operation is used to open the Hardware Profile Setup screen.		
61.	Customer Edit	This button operation open the current selected customer in Edit mode at POS.		
62.	Customer View	This operation is used to open the customer information in read-only mode.		
63.	Open Menu	This operation is used to open the menu on run-time at POS (Menu with submenu). Using this operation, you can mention, which menu needs to be opened in available five grids on POS Designer.	**POSMenu**: Name of SubMenu Panel (Design Panel), which would open on click of button.	**ButtonGrid**: Button Panel which would be the container for POS Menu(Paramer1).
64.	Transaction Search All Stores	This button operation is used for searching the transactions from all stores.		
65.	Custom Event	This operation is used to identify custom events that are used for extensibility purpose.	EventName: It provides the name of custom event that is used to identify the event for writing your own logic in iVend Extensibility.	
66.	Open User Menu	This operation is used to open the User Menu Form in POS.		
67.	Show Notification	This button operation will open the		

		Notifications screen at the POS.		
68.	Show Customer Dashboard	This button operation would open up the Customer Dashboard.		
69.	Show Product Dashboard	This operation is used to show the Product Dashboard screen.		
70.	End Of Day	This operation is used to perform end of day from Terminal POS.		
71.	Sale Attributes	This button operation would open the screen to capture the 'Sale Attributes'.		
72.	Transaction Item Attributes	This button operation would open the screen to capture the 'Line Attributes' for the selected transaction item.		
73.	Tax Free	The feature enables the user to mark an item as tax free item.		
74.	Close Cashier Day	This operation is used to close the cashier day from POS.		
75.	Custom Payment	This operation would allow user to associate a payment type with this button. Clicking on this button will enable user taking the payment using the selected payment type at POS.	Product: Select the custom payment type which is to be taken on click of this button.	