



# iVend Retail



## Product Update

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## Table of Contents

iVend Retail 4.5.3 .....	6
Quick Complete – Cash.....	6
Swiping of Credit Card from Transaction Screen .....	6
Complete Tendering at Zero Balance .....	6
Reinitialize Hardware .....	6
Setting Defaults .....	6
Query Generator .....	6
Label Report – AveryL5167.....	7
Inventory Status Report .....	7
Credit Card Details Report.....	7
Transaction Integration Failure Report .....	7
Enhanced In Replication Engine .....	7
iVend 4.5.1.....	7
Logging for the Payment Processors .....	7
Price Override allowed Flag.....	7
iVend 4.5.....	8
Multicurrency Support for Cash Tender Type .....	8
Default Tender Setup for Customer .....	8
Tax Events.....	8
Item based Printing .....	8
Customer based Printing .....	8
Enhanced Configuration Manager .....	8
iVend Transaction Reconciliation .....	9
iVend 4.4.....	9
Gift Certificates.....	9
Transaction Rollup.....	9
Item Locked at Warehouse .....	9
Product Association to Vendor.....	9
iVend 4.3.2.....	10
Support for 64 Bit Operating System .....	10

Label Printing while Doing GRN.....	10
Suspending Transaction having Sales Order .....	10
Credit Card Number Encryption .....	10
Enhancement in Replication & Integration Engine .....	10
iVend 4.3.0.....	11
Master Tills (Reusable Tills) .....	11
Detailed Tender Counting For Credit Card/ Debit Cards/Voucher/ Check / Travelers Check .....	11
Gift Receipts .....	11
Payment Receipt .....	11
PCI compliance for iVend .....	11
A4 Based Receipt Printing .....	11
iVend 4.2.0.....	12
Pricing Resolution.....	12
Happy Hours for Promotion .....	12
Label Printing of Alternate UPC Codes .....	12
Customer Group based Discounts.....	12
Product Group based Discounts.....	12
Manufacturer based Discounts .....	12
Quotations at POS .....	13
Selecting Multiple Items for Deletion .....	13
Data Export from iVend.....	13
Custom Tendering .....	14
Support for Franchisee Model.....	14
Reports Added-.....	14
Loss Prevention Report:.....	14
Time Sheet Report: .....	14
Till Report: .....	14
Inventory Status:.....	14
End of Day Report:.....	14
iVend 4.1.0.....	16
Search Screens.....	16
Fulfillment.....	16
Suspended Transactions.....	16
Special Order .....	16
Keyboard Enter Key Mapping.....	16

Customer Based Discounts..... 16

Alternate UPC Codes ..... 16

Store Expenses ..... 16

Kit Build / Break from POS..... 17

Print Layout attached to Store Transfer Shipment screen..... 17






Fulfillment Surcharges..... 17

Localizations Supported ..... 17

iVend 4.0.0..... 19

    iVend 4.0 Features..... 19

## Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

## Typographic Conventions

Type Style	Description
<i>Example text</i>	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options. Cross-references to other documentation.
<b>Example text</b>	Emphasized words or phrases in body text, titles of graphics and tables.
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example, SELECT and INCLUDE.
Example text	Screen output. This includes file and directory names and their paths, messages, source code, names of variables and parameters as well as names of installation, upgrade and database tools.
EXAMPLE TEXT	Keys on the keyboard, for example, function keys (such as F2) or the ENTER key.
<b>Example text</b>	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.

## iVend Retail 4.5.3

### Quick Complete – Cash

Using “Quick Complete” functionality the cashier can complete the transaction in a single click. If the Cash Type tender is setup in the system then on clicking this button at POS, the system assumes that the cashier is likely to take the payment from customer using the Cash tender, and thus completes the transaction considering that the customer has paid the amount in Cash.

### Swiping of Credit Card from Transaction Screen

Now cashier can swipe the customer’s Credit Card from the main transaction screen at POS without going to the payment screen and selecting the Credit Card payment option from there. This will make the transaction completion process much faster.

### Complete Tendering at Zero Balance

This setting is provided in the retail profile. If this flag is on set then as soon as the transaction is tendered completely, the transaction will complete automatically and the receipt will be printed. In the earlier version of iVend, users had to press “OK” button on the payment screen to complete the transaction even if the transaction was tendered completely. This is another enhancement done to speed up the transactions in iVend.

### Reinitialize Hardware

This button is added in the user menu at the POS so that if the attached hardware stops functioning during the transaction, clicking on this would reinitialize the hardware and thus the attached hardware would start functioning again.

### Better Handling of System Crashes

This functionality enables the system to handle any unexpected situation arising at POS due to which it crashes. Now if due to any unexpected error the POS system crashes then before closing the application iVend will put the current transaction in a suspended mode.

Restarting the POS system again, the cashier can then search for this suspended transaction and can then recall this transaction to complete it later.

### Setting Defaults

User can now configure the default values for both Customer Group and the Product Group. This speeds up the creation of customer and product field from iVend. The State and Country field of the customer address is set to default matching the stores State and Country fields while defining a customer Address.

### Query Generator

The Management Console now has the Query Generator which will accept the SQL Queries. These queries will be executed against the database to which Management Console is connected and would then give the result to the user. These returned result from Query

can be exported to an excel file for further analysis. Users would be able to save the templates of the queries often used.

### **Label Report – AveryL5167**

New label report is added into system to print small sized labels. On a standard A4 sheet, 88 labels are printed using this report.

### **Inventory Status Report**

Existing inventory status report is modified to include the warehouse along with the stores. Now the user can pull up the inventory status for all warehouses marked in SAP Business One.

### **Credit Card Details Report**

A new report is added to show the breakup of the amount transacted based on the credit card types.

### **Transaction Integration Failure Report**

A new report is added to show the details of the iVend transaction that has failed to integrate with SAP Business One. This report is useful to do the analysis on the failed transaction.

### **Enhanced In Replication Engine**

Replication engine is enhanced to keep the database size of Store and Enterprise to the minimum extent possible.

## **iVend 4.5.1**

### **Logging for the Payment Processors**

Users can now log the requests sent from iVend to the payment processor for processing the payment using credit cards.

### **Price Override allowed Flag**

Flag is provided on the product card so a store manager can restrict users for changing the price of an item during sales. By default the flag is set to true, so that cashier can override the price of an item at POS based on the limits set for price override in the retail profile.

## iVend 4.5

### Multicurrency Support for Cash Tender Type

“Multicurrency” functionality is now provided in iVend. Users will be able to take the cash payment in foreign currencies defined in iVend. Based on the prevailing exchange rates defined for a day in SAP Business One the amount can be taken from customers at POS.

Cashier can do the till counting for the collected foreign currency. Variance found in the counting can also be posted to SAP Business One. Store manager can use “Tender Collection by Till” report available at Management Console to see the denomination details of the collected foreign currency.

### Default Tender Setup for Customer

To save cashier’s time at the POS, a user can now setup the default tender type for each customer. Now if you have a customer who always pays using Credit Card then for this customer a user can set the default Payment Type as Credit Card. Whenever the customer is selected for the transaction at POS then by default the user will be prompted to take the payments from Credit Card. However the user also has an option to take the payments from other Tender Types defined in the system.

### Tax Events

For a defined period, users can define the special Tax Rates for the items. The special Tax Rates can be applied on Customer Group, Customer, Product Group or on Product. After the Tax Event expires the normal tax rates would be applicable for the product.

### Item based Printing

Store manager can setup additional information to be printed on receipt for a particular product or a product group.

### Customer based Printing

Store manager can setup additional information to be printed on receipt for a particular customer or a customer group.

### Enhanced Configuration Manager

Configuration manager is enhanced in this version to provide the reports for the negative inventory that might occur due to posting of iVend transactions in SAP Business One. Users will be able to export the erroneous entries in an excel file for detailed analysis of the issue.

Before the iVend 4.5 version, users had to retry posting the records that failed to integrate with SAP Business One. In iVend 4.5, users can configure the integration service to retry the failed records automatically by defining the retry time interval.

## iVend Transaction Reconciliation

iVend allow users to do multiple type of transactions in a single transaction at the POS, since in such transactions more than one business document is created in SAP Business One. It was felt that there is a need to have options of viewing which all business documents are created when an iVend transaction is integrated to SAP Business One.

From this menu option available in iVend, users will be able to see the entire document entries that a transaction has created.

## iVend 4.4

### Gift Certificates

“Gift Certificate” functionality is now provided in iVend. Users will be able to issue / Recharge the gift certificates for customers. The gift certificates can also be configured for giving Cash Back to customers against the issued Gift Certificates. Inventory tracking for the Gift Certificates is also possible with iVend.

### Transaction Rollup

The iVend Retail 4.4 version integrates seamlessly with SAP Business One 2007. Each individual transaction on the iVend POS is integrated to one or multiple SAP Business One transactions depending on the transaction types included in the iVend POS transaction.

To reduce the volume of transactions being integrated into SAP Business One, this feature will roll up sale transactions in iVend before they are integrated / posted in SAP Business One. This process may substantially reduce the number of A/R Invoices and A/R Credit Memos in SAP Business One depending on the retail scenario.

### Item Locked at Warehouse

A retail chain may be selling a number of product lines and not all products may be sold at all the stores. Therefore it is required to block the use of certain products in certain stores. Using this feature, users will be able to block items for inventory transactions such as Sale, Purchase, Goods Receipt, Stock Transfer, etc, at selected stores.

### Product Association to Vendor

In most business scenarios, not all products are procured from all vendors. Each vendor supplies specific product lines / products. CitiXsys is planning to enhance the existing iVend functionality by incorporating a new feature of associating products to vendors. This feature will enable the user to view a vendor specific listing of products while creating a Purchase Order in iVend, thereby reducing the time and effort spent in choosing vendor specific products.

## iVend 4.3.2

### Support for 64 Bit Operating System

iVend now supports 64 bit operating system.

### Label Printing while Doing GRN

This feature will enable users to generate the labels for the goods received at the store. User will be able to generate labels while doing the good receipt, receiving goods against Purchase Order and while receiving the stocks done through stock transfer.

### Suspending Transaction having Sales Order

From this version onwards users will be able to suspend / recall the transaction that has the sales order line items.

### Credit Card Number Encryption

This feature will encrypt the credit card numbers while posting the payment in SAP Business One. Users will also have the facility to see the decrypted number if the user has the rights to see the decrypted number in SAP Business One.

### Enhancement in Replication & Integration Engine

The services are optimized so that they are able to handle large volume of data to be replicated to other stores or to be integrated with SAP Business One.

## iVend 4.3.0

### Master Tills (Reusable Tills)

This feature will enable the reuse of master tills, once created these can be assigned to the user/team. After the master till is assigned to a user it cannot be used further till the user closes the earlier till. The functionality also gives an option to store manager to reassign all the till when he runs the day end process.

### Detailed Tender Counting For Credit Card/ Debit Cards/Voucher/ Check / Travelers Check

The enhancement allow users to do the detail level count of the debit card / credit card/ check etc. collected in till. The user can select the detail of these payments that are there in his/her till.

### Gift Receipts

After the transaction is complete, a cashier has an option of taking the gift receipt printout by selecting the items from transaction for which the gift receipt is required.

### Payment Receipt

Users will now have an option to specify the format for the receipt by which the transaction is tendered. Users also have an option to specify the count of the payment receipt that is required for e.g. credit card receipt is to be signed in duplicate.

### PCI compliance for iVend

iVend is now PCI compliant and stores the credit/ debit card details in an encrypted format in database.

### A4 Based Receipt Printing

This enhancement will allow users to specify the A4 based receipt formats that can be printed at the end of transactions.

## iVend 4.2.0

### Pricing Resolution

This feature will enhance the existing pricing engine in iVend. This feature will enable the user to define the pricing resolution method when calculating price of an item, i.e. – when more than one price are applicable.

The user will be able to set the pricing resolution to any of the following value:

- **None:** If set to none, the pricing resolution order will be followed.
- **Resolve to Lowest:** If set to lowest, then the pricing engine will determine all the available discounts for the Product and will apply the Highest Discount to the transaction line. This setting gives the maximum benefit to the Customer by applying the highest discount and thus resolving to lowest price.
- **Resolve to Highest:** If set to highest, then the pricing engine will determine all the available discounts for the Product and would apply the Lowest Discount to the transaction line. This setting gives the maximum benefit to the Retailer by applying the lowest discount and thus resolving to highest price.

### Happy Hours for Promotion

The Happy Hours feature in iVend will enhance the existing promotions feature by enabling the retail chains to setup and apply promotion for a limited time period within a business day. The setup for this feature will be available from the Management Console interface and will be applied to the POS transactions at the time of completing the sale.

### Label Printing of Alternate UPC Codes

This feature will allow users to print Shelf and Item labels for products with alternate UPC codes. Label printing in the current release of iVend, i.e. –4.1 is limited to printing Shelf and Item labels for the primary barcode defined for the products.

### Customer Group based Discounts

This feature will enable users to specify the discounts based on the Customer Groups in iVend. Since it is not possible to define discounts on Customer Groups in SAP Business One, therefore the user will have the ability to define discounts for Customer Groups in iVend. Also the user will be able to define the date ranges for these discounts.

### Product Group based Discounts

This feature will enable users to specify the discounts based on the Product Groups in iVend. Since it is not possible to define discounts on Product Groups in SAP Business One, therefore the user will have the ability to define discounts for Product Groups in iVend. Also the user will be able to define the date range for these discounts.

### Manufacturer based Discounts

This feature will enable the user to specify the discounts based on the product Manufacturer. Since it is not possible to define discounts on Manufacturers in SAP Business One, therefore the user will have the ability to define discounts based on Manufacturers in iVend. Also the user would be able to define the date ranges for these discounts.

## Quotations at POS

This feature enables the user to create quotations (Proposed statement of products, quantities and price etc. sent to a customer) document in POS. The quotation can be made for both 'One time customer' and 'Master Customers'.

The aforesaid feature in the product allows the quotation items to be converted into following:

- i) Sales Order
- ii) Sales

## Selecting Multiple Items for Deletion

Currently, iVend allows deleting only records one by one from the search screens. This feature will enable the user to delete multiple records from the search screens. The user will be able to search the records based on the search criteria and then select multiple records on the screen and delete the records accordingly. If the system is not able to delete any of the records due to system validation, a suitable message will be displayed to the user and not any of the records will get deleted.

## Data Export from iVend

Export functionality allows a user to export information from the iVend database in excel files. This will allow the user to use this information either for reporting requirements or for doing bulk updates in iVend.

This will save a lot of time and effort for the user, since doing bulk updates will be easier and faster in excel then doing the same exercise in Management Console.

The following objects will be allowed to be exported:

1. Zip Code
2. JobCode
3. Department
4. EmployeePosition
5. ProductCategory
6. UPCTranslation
7. SaleAttribute
8. ReasonCode
9. SecurityUser
10. Employee
11. Message
12. UpsellProduct
13. FulfillmentPlan

14. LayawayPlan
15. RetailProfile
16. Store
17. Vendor
18. Customer
19. POS
20. Product

## Custom Tendering

With the introduction of this functionality, users have an additional level of flexibility while defining the payment types. User can 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.

## Support for Franchisee Model

This feature functionality will allow the user to setup at the Warehouse level (in SAP Business One) the type of warehouse, whether it is

- Company owned, company operated
- Company owned, distributor operated
- Distributor owned, distributor operated

Depending on the type of store the system will not allow the user to change different objects like Masters, Inventory transactions etc.

## Reports Added-

### Loss Prevention Report:

This report will show the number of voids, returns, price overrides, tax overrides etc done by the cashier.

### Time Sheet Report:

This report will show the clock in, clock out and the number of break the cashier has taken. The report will be useful in calculating the number of hours worked by the cashier on till.

### Till Report:

The report will show the details of the till along with the opening and closing amounts. The report will also display the details of the counting done for the till.

### Inventory Status:

The report will show the details of the inventory availability in the store along with the quantities required for fulfillment etc.

### End of Day Report:

The report is very useful for the store managers as it shows the product category wise details of the products sold, returned during the day. This report also shows the collection done in the store. If details are required then this report will show the till wise collection done during the day.

## iVend 4.1.0

### Search Screens

With version 4.1 of iVend Retail it is possible to define the default search criteria for each search screen in the iVend application. The user will be able to define the sequence of search criteria appearing in the search criteria screens.

### Fulfillment

Ability to attach fulfillment for cash customers by accepting the address related validations using the comments or the existing address registration screen.

### Suspended Transactions

Suspended transactions will be removed automatically on performing the end of day transactions. The suspended transaction can alternately be removed manually.

### Special Order

In case of a transaction with Cash Customer and insufficient inventory available at the store, following improvements have been made in the transaction sequence:

- a. Negative Inventory resolution screen will open which will have a Special Order button enabled.
- b. Clicking the special order button will launch the customer selection screen for the user to choose a Customer Code instead of the default Cash Customer.
- c. On selecting the customer other than the Cash Customer, will load the selected item as a Special Order item on the POS transaction line.

### Keyboard Enter Key Mapping

The OK key on the on-screen keyboard of the Payment and Transaction Complete screen has been mapped to the Enter key on the Keyboard.

### Customer Based Discounts

The Total discount percentage defined within the Business Partner master data in SAP Business One has been integrated to iVend and the same is applied on the POS transaction based on the applicability for the selected customer. This discount is applied only on the discountable items within the transaction.

### Alternate UPC Codes

Ability to define item quantity against the alternate UPC Code. Based on the scanned UPC code, the item quantity will be set to default / populated on the POS transaction line thus triggering quantity based pricing.

### Store Expenses

Ability to record store expenses from the POS and Management Console. The expenses booked in iVend will integrate into SAP Business One as Journal Entries.

## Kit Build / Break from POS

Facility of breaking and Building Kit from the POS negative inventory resolution screen.

## Print Layout attached to Store Transfer Shipment screen

Facility to print a Store transfer shipment transaction from the Store Transfer Shipment screen in SAP Business One.

## Fulfillment Surcharges

Sum Total of Surcharges attached to fulfillment are now displayed separately in the Item information area.

## Localizations Supported

Following SAP Business One localizations with their current support status is listed below:

Sl. No.	Cluster	Localization	Locale Supported	Resource Strings	Support Status
1	A	Australia/New Zealand	US - English	English	Production
2	A	Austria	US - English	English	Experimental Beta
3	A	Belgium	US - English	English	Experimental Beta
4	A	Canada	US - English	English	Production
5	A	Chile	US - English	English	Experimental Beta
6	A	Costa Rica	US - English	English	Experimental Beta
7	A	Cyprus	US - English	English	Experimental Beta
8	A	Czech Rep.	US - English	English	Experimental Beta
9	A	Denmark	US - English	English	Experimental Beta
10	A	Finland	US - English	English	Experimental Beta
11	A	France	US - English	English	Experimental Beta
12	A	Germany	US - English	English	Experimental Beta
13	A	Guatemala	US - English	English	Experimental Beta
14	A	Hungary	US - English	English	Experimental Beta
17	A	Mexico	US - English	English	Experimental Beta
18	A	Netherlands	US - English	English	Experimental Beta
19	A	Norway	US - English	English	Experimental Beta
20	A	Panama	US - English	English	Experimental Beta
21	A	Poland	US - English	English	Experimental Beta
23	A	Russia	US - English	English	Experimental Beta
24	A	Slovakia	US - English	English	Experimental Beta
25	A	South Africa	US - English	English	Experimental Beta
26	A	Spain	US - English	English	Experimental Beta
27	A	Sweden	US - English	English	Experimental Beta
28	A	Switzerland	US - English	English	Experimental Beta
29	A	United Kingdom	US - English	English	Production
30	A	United State Of America	US - English	English	Production
31	B	Japan	US - English	English	Experimental Beta

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32	B	India	US - English	English	Beta
33	B	Korea	US - English	English	Experimental Beta
34	B	P.R. China	US - English	English	Experimental Beta
35	B	Singapore	US - English	English	Experimental Beta

## iVend 4.0.0

### iVend 4.0 Features

- Management Console for managing store operations
- Support for multiple transaction types in a single transaction, Example- the user can execute a Sale, Sale Return in a single transaction.
- Support for Tax Inclusive prices.
- Price list support for product.
- Special pricing support.
- Hierarchy and expansion support.
- Line level taxes - warehouse wise item wise tax
- Warehouse based pricing.
- Local purchase order creation and good receipt against it at store
- Serial and batch items support
- Customer creation from POS
- Refund sale
- Refund Items support without transaction slip
- User Defined POS profile
- Security module to define user / rights at store
- Support for In-Transit warehouse
- Cash Management
- Visibility of inventory at all stores
- Secure Credit Card Authorizations
- Stock transfer between stores; Stock Transfer Head Office and Store.
- UPC translations

- Sales Orders booking at the POS
- Fulfillment
- Team banking – Allows for multiple users to share a single drawer or multiple drawers in a single store.
- Drawer banking – Ability to assign a specific user to a till. This allows for the assignment of a single user to a POS terminal.
- Inventory Kits (Break down, build up) – Create, manage, break down, and build up kits at the store level. 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 relieved\added from inventory.
- Inventory Assemblies – Ability to create and manage assemblies at the store level. Assemblies are not created in inventory and the components relieved from inventory until the time of sale.
- Surcharges – Surcharges enhanced to include the assignment to items, item groups and sales modes. This enhancement will allow for core charges, delivery costs, or maintenance costs.
- Job codes – The addition of job codes allows users to select the job code at login in the system. Job codes offer security grouping and labor reporting for multiple job types.
- Open items - At the store level an item can be defined to as an open item. This item can be used with price override, description override for sales of inventory not in the system. This is the basis for catalog and consignments in the system.
- Description override – Allow the user to override the description at the POS terminal for sale transactions. Used for selling open items and special order items tied to a single item master record.
- Customer \ Store tax exempt – Ability to mark a store or customer as tax exempt.
- Tax exempt periods – Gives the ability to create a tax free period for specific items and item groups. For example in the US before school begins each year there is a tax free weekend for school supplies and school cloths. In the management console you can create a tax free event for a specific date and time range.
- Promotion system
  - Events – Setup events for grouping promotions. This is used for reporting purposes; this is the first step to the merchandise system.
  - Buy some get some – Ability to setup a buy x from product or product group and get y from a product or product group at a reduced cost by percent or amount. Auto applied at POS terminal.
  - Combo – Will be handled through kits

- Line level \ Sale level discounts – User level discounts with security that allow for unrestricted application of multiple line level and sale level discounts.
- Miscellaneous Features
  - Non returnable items – Ability to mark items as non-returnable in the management console.
  - Age verification – Select items in the POS that require age verification. This will prompt the user during sale transaction for birth date.
  - Item based printing – Setup item and item group based printing. This allows for printing of items such as “AS-IS” statements, warranty information, return policies, etc....
  - Item creation at store – Item master records can be created in the Management Console or POS. These items will be pushed into the ERP system during the integration link.
  - Sale level comments – The ability to add and store sale level comments at the POS. These comments will be available for printing.
  - Item level comments – Ability to add line level comments at the POS terminal