



Infor Distribution A+ Point of Sale Overview

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Point of Sale Overview

The Point of Sale module lets you extend your Infor Distribution A+ system from the management of distribution to the direct retail environment, expanding your market reach. With Point of Sale, you can set up and operate retail stores using the customer and item data that you already have in your system.

Application Features

This section describes some of the features of Point of Sale that help you to manage your store, including security features, reports and inquiries, and managing orders and returns.

Managing Stores

Point of Sale allows you to define multiple stores. A store is an individual retail establishment associated with a company and warehouse. Once you have defined your store, you can then create multiple terminals and drawers. Each maintenance allows you to individualize the operation of your store, terminals, and drawers to fit your business needs.

You can also create payment methods for each type of payment that you will accept at your stores. Payment methods are defined for a company and apply to all stores defined for the company. The following payment options are available:

- cash
- credit card
- check
- store credit
- gift card/certificate
- on account.

You can customize your receipt text and printing for a store.

Managing Security

There are two methods that you can use to manage the security at a terminal. First, by how you define the store and second, by how you define clerk IDs.

When you define a store, you can require that clerks sign on before each transaction. Requiring a sign on before each transaction, ensures that no one can step up to a terminal and use it without first providing a secure clerk ID and password.

Each person who uses a Point of Sale terminal will have a clerk ID and password assigned to them. The clerk ID and password are required to sign on to Point of Sale Entry. When you define clerk IDs, you can set a number of limits on what activities are available to the clerk. You can set the clerk ID to prevent the clerk from

- using the clerk ID in multiple stores
- entering a return
- overriding prices
- viewing cost
- maintaining cost
- viewing customer information
- canceling an order
- canceling line items, including special charges and comments.

In addition, each transaction at a terminal is recorded and can be reviewed, limited by clerk, on the POS Audit Report.

To handle situations where a clerk may not have authority to perform a task, authorization codes can be created and used to override the clerk's security so that a transaction can be completed by someone with authority (someone who knows the appropriate authorization code).

Reports and Inquiries

Reports and inquiries are available for closing and verifying cash drawer amounts at the end of a shift and/or business day. The following inquiries are available:

- Point of Sale Inquiry, used to inquire into all orders and returns. You can limit the inquiry by transaction status. From this inquiry you can reprint receipts.
- Store Close Inquiry, used to review and confirm close data for a store.
- Terminal Close Inquiry, used to review the day's activities at a terminal and record the close amounts.

Point of Sale also provides the following reports and forms:

- Terminal Close Form, to record the drawer counts.
- Terminal Close Report, which summarizes the drawer counts for the terminal.
- Store Close Report, which summarizes the closing information for all terminals in the store.

- POS Audit Report, which summarizes all of the activities and transactions at a terminal and drawer by clerk, terminal, and/or payment method.

Managing Orders and Returns

All orders and returns are entered through Point of Sale Entry (MENU PSMMAIN). Through this secure option, you can process transactions for existing customers or a default Point of Sale “walk-in” customer. The taxing and pricing information you have defined in Infor Distribution A+ is also available through this option, as well as customer and item searches. Lot, serial, catch weight, will call, pickup/delivery, special order, and drop ship items are also supported. For orders and returns you can:

- add special charges
- add comments
- perform a no-sale transaction
- initiate a warehouse transfer
- save the transaction before applying payments
- check out and apply one or more of six payment methods.

To manage the terminal and drawer, you also have the ability to:

- add and remove money from the drawer (drop/pull)
- close the terminal and provide drawer counts.

Point of Sale Interfaces

Point of Sale interfaces with the following Infor Distribution A+ modules:

- Order Entry
- Accounts Receivable
- Inventory Accounting
- Inventory Management & Planning
- Warehouse Management
- General Ledger
- Electronic Payments
- Sales Analysis
- International Currency.

This section briefly describes each interface.

Order Entry

Point of Sale uses Offline Order Entry to submit Point of Sale orders to the Order Header File (**ORHED**) and Order Detail File (**ORDET**). Once an order has been entered and all payments applied, an Invoice Only order is automatically generated in Order Entry through Offline Order Entry. Then, Point of Sale generates and prints an invoice at the invoice output queue specified for the terminal. Once the invoice is created, the order status is changed to “invoice printed” and the required file updates are made during the next Day-End Processing. You can review Point of Sale transactions in your Order Entry reports and inquiries.

Accounts Receivable

The customer information that you have defined in your system through Customer/Ship-to Master Maintenance (MENU ARFILE) is available to Point of Sale. This integration allows you to continue to offer the same pricing and payment terms for your existing customer base when they purchase from you.

To handle customers that are not established and “walk-in” to make purchases, you can create a standard “walk-in” customer to use in Point of Sale. This customer may be assigned as the default customer for a store.

To track payment information, Point of Sale payment methods are linked to the payment types that you have created through Payment Types Maintenance (MENU ARFILE). Based on your General Ledger reporting needs, you may want to create unique Point of Sale payment types to associate with the payment methods. Refer to General Ledger on page 3-5 for more information about account posting.

Inventory Accounting

The item information that you have defined in your system through Item Master Maintenance and Item Balance Maintenance (MENU IAFILE) is available to Point of Sale. If you want to be able to scan items during the sales transaction, you can associate the items that you currently have defined with universal product code (UPC) bar codes through Item UPC/UOM Cross Reference Maintenance (MENU PSFILE). All types of items are fully supported, including lot, serial, and catch weight.

Inventory Management & Planning

If you are using the Inventory Management & Planning module to help you manage and track demand for items, Point of Sale will update demand for an item when an order is created through POS Entry (MENU PSMAIN).

Warehouse Management

You must create a single default Point of Sale (POS) location for a warehouse, and you can create an override location for each item. Warehouse management reservations will be created for Point of Sale based either on the default POS location or the override POS location. The override location will always be used if it exists for the item; otherwise, the default location will be used.

Point of Sale will allow inventory to be sold from a location when the system does not reflect enough quantity to fulfill the sale. As a result, an item may have a negative inventory balance in the system. If this happens and a location is over-reserved, the item will be flagged for a cycle count. You can also use the Warehouse Management Location Audit Report (MENU WMREPT) to print a list of negative item balances.

Note: For a lot of item, the aging date that will be assigned to the sale of an item is determined by either the specific WH/location where the item was available, or by the transaction date if the item was “in hand” at the time of the transaction.

General Ledger

Point of Sale can use your General Ledger Transfer Definition to post Point of Sale transaction payments to the accounts that you want to use. Point of Sale uses payment methods, which are linked to payment types that you have defined through Payment Types Maintenance (MENU ARFILE).

If you have set up your General Ledger Transfer Definition to use payment type when selecting the posting account, your Point of Sale payment methods will post to the accounts assigned to their payment type. If you want your Point of Sale payment methods to post to unique Point of Sale accounts, you must then create unique payment types for Point of Sale.

Example:

Assume that you have a payment type defined for checks that posts to account 1.1.1003. If you associate that payment type with the check payment method, check payments in Point of Sale will also post to account 1.1.1003.

Assume now that you want to track your Point of Sale check payments in a separate account. You would then create a payment type for Point of Sale checks that posts to accounts 1.1.1004 and associate that payment type with the check payment method in Point of Sale. Then, checks not processed in Point of Sale will post to account 1.1.1003 and checks processed in Point of Sale would post to account 1.1.1004.

Electronic Payments

You can use Electronic Payments with Point of Sale to automatically process credit card transactions. You will have to define a credit card payment type for each credit card that you accept.

Using Merchant and Payment Assignments (MENU EPFILE), assign the merchant and credit card payment type relationship at the company level (and, only if necessary, at the warehouse level).

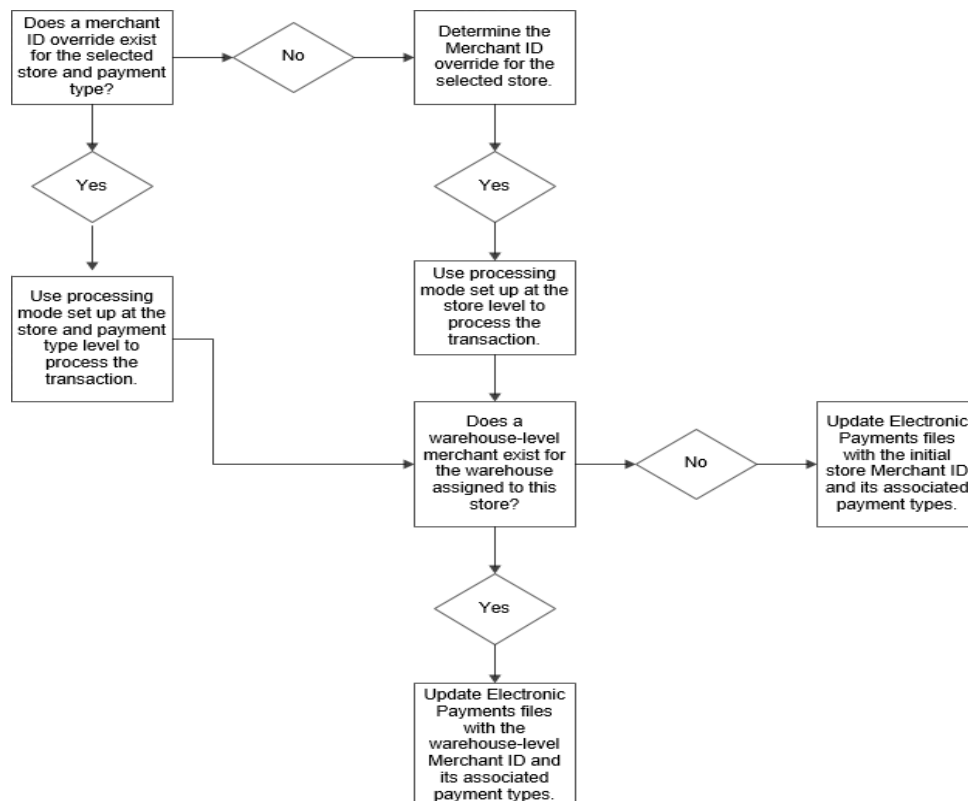
Using Override Merchant IDs Maintenance (MENU PSFILE), define a CenPOS Merchant ID for each store (not at the store/payment type level). When you set up a Merchant ID override for a store, that Merchant ID's processing options will be used to determine how to handle the credit card transaction.

For each store for which you are creating a Merchant ID override, you specify the default:

- online/phone Merchant ID - Merchant ID used for online/phone authorization and settlement for transactions
- manual authorization Merchant ID - Merchant ID used for manual authorization and settlement
- authorization mode - defined at store level (not the store/payment type level), can be online, manual, or phone

The user can override the default authorization method to indicate which method they are using to authorize the credit card payment. Authorization Mode 1 or 2 will issue a CenPOS panel or use a stored secure card in order to process the transaction. Meanwhile, Authorization Mode 3 will allow manual entry into Infor Distribution A+ for a POS transaction that may have been processed by an alternate method (such as, using the CenPOS virtual terminal).

When credit card transactions are processed through Point of Sale or through AR Quick Pay, accessed from Point of Sale, the hierarchy (outlined in the flowchart below) is used to determine how to handle the transaction.



Sales Analysis

All Point of Sale transaction data flows to Sales Analysis during Day-End Processing so that your sales figures will include all retail sales data.

International Currency

If you are using International Currency, Point of Sale supports transactions in the default currency for the company's store.

Point of Sale Requirements

This section describes the hardware and software that you will need to begin using Point of Sale.

Software

To use Point of Sale, you must have the Infor Distribution A+ base modules and Cross Applications installed at Version 5.0, cumulative 18 or later. The base modules include:

- Accounts Receivable
- Inventory Accounting
- Order Entry
- Sales Analysis.

Point of Sale can also be used with Electronic Payments, Warehouse Management, and General Ledger.

Hardware

To use Point of Sale, for each terminal you will need a:

- a PC that interfaces with your company's Infor Distribution A+ system to track customer, inventory, pricing and taxing information.
- bar code scanner for scanning items being purchased (optional). There are a variety of scanners available and most can be customized. This may cause the behavior of your scanner to be slightly different than the behavior described in this document.

- credit card reader. If Electronic Payments is installed, the credit card reader may be connected to the terminal; otherwise, it can be a separate device. The credit card reader can be an individual swipe machine or it can be integrated into the keyboard.
- cash drawer where money, checks, and signed credit card receipts are kept during each shift.
- receipt printer. A receipt printer with an auto cut feature is recommended.

The following table lists the hardware that has been tested and confirmed with Point of Sale.

Component	Tested and Confirmed Hardware
Cash Drawer	MMF ECD-200 (with Citizen interface) or MMF POSPlatformII (with Citizen interface). Cash drawers must be compatible with the selected printer using the interface cable supplied by the cash drawer manufacturer.
Keyboard (with built-in credit card reader)	Unitech K2724B or Cherry 8000 with barcode ports. Both Track 1 and Track 2 are supported. Contact your credit card provider to determine which one to use.
Bar Code Scanner	Metrologic MS951, Metrologic MS9520 Voyager, Metrologic MS7220, Metrologic Orbit Laser Barcode Scanner, Symbol LS1902T-1000.
Receipt Printer	Citizen IDP-3210 (Thermal), Citizen IDP-3550 (Impact), Citizen IDP-3551 (Impact), Star Micronics TSP700 (Thermal), Epson TM-88111
Signature Capture Device	HHP (Welsh Allen) TT3100

Track 1/Track 2 Data Notes

This section contains configuration information for scanning devices using Track 1 or Track 2 data.

If you are using Track 1 data, the scanner/reader should be configured as follows:

- prefixed with %B
- data delimited with ^
- lines ending with question mark (?).

If you are using Track 2 data, the scanner/reader should be configured as follows:

- prefixed with a semicolon (;)
- data delimited with =
- lines ending with question mark (?).

If you are using Track 2 gift card numbers and the card number is less than twenty characters, the gift card number will contain all digits left and right of the delimiter (=) when it is scanned. If the card number is greater than twenty characters, the gift card number will contain all digits to the left of the delimiter when it is scanned.

If scanned data is not in either of the formats for Track 1 or Track 2 data explained here, contact your scanning device provider for information on appropriate configuration.

Point of Sale Terminal Control Strings

Manufacturer	Model	Drawer	Cash Drawer Control String iSeries	Auto Cut Control String iSeries
Citizen	idp3550 (Impact)	Drawer 1	1A	Not Available
		Drawer 2	7	
	idp3551 (Impact)	Drawer 1	1A	1B5000
		Drawer 2	7	
	idp3210 (Thermal)	Drawer 1	1B7000	1B6D
		Drawer 2	1B7001	
Star Micronics	TSP700 (Thermal)	Drawer 1	07	1B6433
		Drawer 2	19	
	Epson	TM-T8III	Drawer 1	
Drawer 2				
TM-T88II		Drawer 1		
		Drawer 2		

Auto Cut string should be programmed into device using Star Micronics configuration software