



# iVend Retail

Retail Management Solution

**SAP**<sup>®</sup> Certified  
SAP Business One Integration



## POS and Retail Management Solution

Retailers face multitude of challenges in today's marketplace. To succeed in an increasingly competitive marketplace, retailers must find innovative ways to compete that are not based solely on price. To effectively stay in business and maximize profitability, retailers must effectively manage business variables, reduce operation costs, maximize efficiencies, ensure excellent customer service, and collaborate with suppliers. To stay ahead of competition retailers must follow customer-buying patterns and forecast future needs.

Many midsize retailers struggle everyday to compete with effectiveness. They lack proper technology solutions and are still struggling with old legacy applications that are not compatible and non-integrated with their business / accounting application; Or worse that they are using spreadsheet applications for analysis which is extremely ineffective and time consuming.

Most retailers need an end-to-end solution, which provides them a near real time view of their operations with centralized control and enables them in faster decision-making.

iVend Retail is an end to end retail solution that covers everything from POS to Back Office to Head Office operations. An iVend Retail setup can range from a Single Store with one POS to a complex multi-store environment with complete integration with your day to day business operations. The solution automates the entire operations, virtually eliminating paper work.

iVend Retail allows the management team at the Head Office to have complete control over data at the stores. It extends flexibility at the Head Office to setup and configure the system from one place and therefore simplifies the management of data.

iVend Retail delivers a configurable, flexible, and scalable solution that is easy to setup and implement and integrates seamlessly with SAP Business One.

iVend Retail is ideal for both high-volume retail operations and high-service specialty stores. High volume retailers will like its quick service interface. High service retailers will appreciate the many complex special order fulfillment options, customer specific pricing, flexible kit combinations, and customized, ticket-building special messaging for the POS screen.

“ I would like to take a moment to compliment CitiXsys team for having done an excellent job in implementing iVEND at Reeves Floral Products. I have worked on several implementations in the past and have never worked with a group who were as eager and talented as your associates. Even with the time difference between India and the United States, there never seems to be an issue completing any development that arises. Thank you again for all your help.

Chuck Woodring,  
Reeves Floral Products, Inc., USA

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## Benefits

**Stay connected with your business operations** - iVend Retail comes as an end-to-end business solution for retailers which uses SAP Business One or SAP Business All-In-One for head office operations and an extensive retail management application to manage store and POS operations. This fail-safe integration with SAP Business One keeps the head office always connected with the store operations across the complete retail chain.

**Inventory control and replenishment** - With iVend Retail, head office operations have complete visibility of stock across the retail chain and can effectively push stock rather than relying on store requisitions. Additionally the merchandising department can raise purchase orders in time to avoid complete stock out situations.

**Never loose a sale** – iVend Retail delivers up to date visibility of stock across the retail chain. POS operators can gain complete visibility of stock across stores or at the main warehouse / distribution centers right from the POS interface. In stock out situations, POS operators can put items on order and fulfill them from other stores or at a later date by replenishing stock from the distribution center.

**Smoothly process routine and complex transactions** – iVend Retail enables the POS operator to combine multiple transaction types with in single POS transaction. For example – POS operators can process a sale refund and sale transaction in a single transaction rather than a two-step process, which involves a separate transaction for sales refund and sale.

**Reliable and safe Credit Card transactions** – iVend Retail offers fast, easy, safe, and cost-effective card management with integrated payment processing from industry-leading banks.

**Grow your average sales ticket** - Up sell and alternate item suggestions pop up on the POS interface enabling the POS operator to make additional recommendations to the customers.

**Retain customers and manage customer communication** – The loyalty management module in iVend allows you to define flexible / lucrative campaigns, which ensure that the customers keep coming back, thereby increasing customer profitability by rewarding the right customer. It delivers a full range of analytics and service capabilities that help you better understand each customer's value and design promotions that maximize the potential of all your customer relationships. Customers can be informed of available points, their value and their validity.

**Promotions that maximize profitability** – Manage targeted promotions by easily analyzing detailed customer trends at individual stores and throughout the retail chain. Promotions can be defined in multiple formats such as period based discounts, quantitative discounts, mix and match and buy some get some.

**Make the right decisions** – Flexible reporting options in iVend help you make accurate decisions.



*We needed a better system to support our company, so we went with SAP®. Our retail shop also needed an easier, user friendly system which integrated with SAP so we selected iVend Retail. We are now better able to track transactions through the system and can also create gift certificates on the fly.*

*Angela Hahn, Administrator,  
MiniJumbuk, Australia*



## Overview

**Head office / In-Store management** - iVend Retail offers complete back office functionality both in the store and at the Head Office. It provides the store manager total control over activities within the store and at the POS. In-Store transactions are replicated to the Head Office, allowing quick decision making without considerable delays

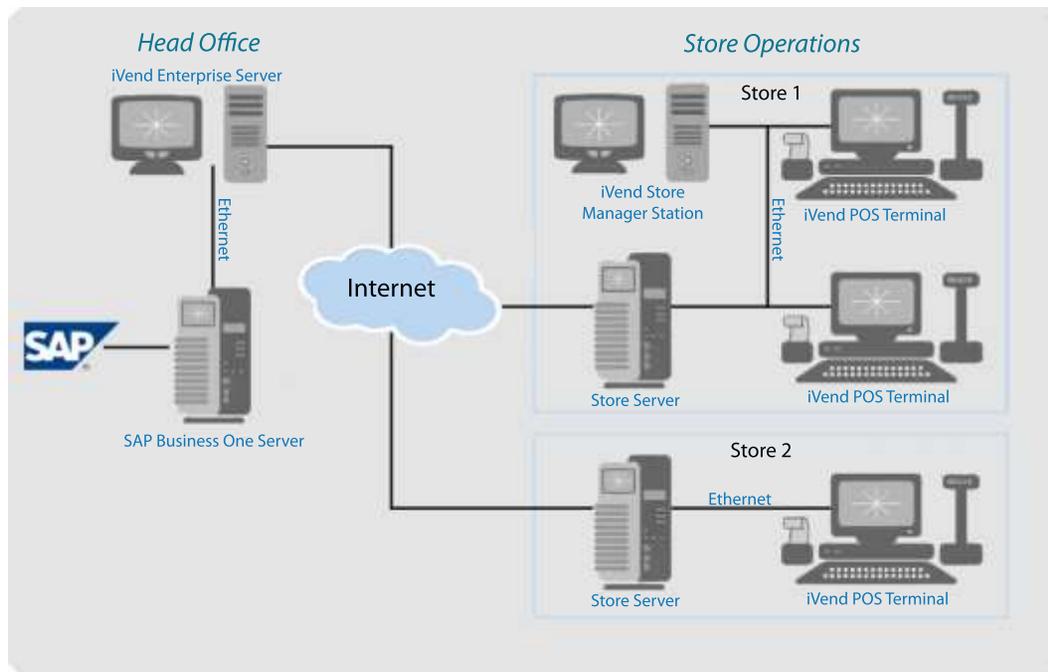
The store set up in iVend Retail is managed from the component known as the Management Console. This module of iVend enables configuration of retail Enterprise/Head Office (HO) and Store entity. The front end user interface remains the same irrespective of the module being set up either at the Enterprise Level or at Store Level. iVend Management Console is installed on the Enterprise/HO and at Stores (optional) to setup the master data required to transact at the POS. The Management Console interface is also used by store managers / store staff to raise purchase orders, receive goods against purchase orders / stock transfers, stock transfer shipment to other stores / distribution

center, cycle counting, requisition management, label printing, etc. iVend is fully PCI compliant and stores the credit/ debit card details in an encrypted format in database.

**iVend POS** - iVend POS is fast, dependable and powerful POS application with an easy to use keyboard or touch-screen operated user interface. iVend POS makes transactions processing error free, easy to manage and execute for any retail operations.

iVend POS application contains industry-leading configuration functions in areas such as pricing, discounts, promotions, tender types, layaways, and returns. The POS interface can be quickly configured to display exactly the information needed by POS operators. Receipts can be customized as required with graphics and logos.

Security levels can be set for POS operations thereby requiring manager override for exceptional transactions.



## Quick Facts - *Head Office / In-Store Management*

Feature	Functionality
User Management	<ul style="list-style-type: none"> <li>• Setup and maintain a database of all the users in the company</li> <li>• Define employee positions such as sales executive, cashier, store manager etc</li> <li>• Time clock management</li> <li>• Analyze employee performance by reviewing sales reports grouped by sales persons</li> </ul>
Security Management	<ul style="list-style-type: none"> <li>• Define security roles and assign various rights to the roles</li> <li>• Assign security roles to users</li> <li>• Set password policies for users</li> </ul>
Inventory Management	<ul style="list-style-type: none"> <li>• Setup Product database for standard, serialized, batch managed, kit, assembly and non-inventory items or download the same from SAP Business One</li> <li>• Items can be marked as non-refundable</li> <li>• Store and track offline inventory</li> <li>• Create, manage, build and break down kits at individual stores</li> <li>• Create and manage assemblies at individual stores</li> <li>• Define Open Items which can be used with price override</li> <li>• Track items by serial and batch numbers</li> <li>• Support for variants of the product</li> </ul>
Security Management	<ul style="list-style-type: none"> <li>• Print item and shelf labels for individual stores</li> <li>• Option to print customize labels</li> </ul>
Local Purchasing at store	<ul style="list-style-type: none"> <li>• Create purchase order for local vendors at stores</li> <li>• Local purchase orders are automatically synchronized in SAP</li> <li>• Receive stock against local purchase orders which are automatically synchronized in SAP Business One as Goods Receipt PO</li> </ul>
Stock Transfer	<ul style="list-style-type: none"> <li>• Create Stock Transfers between stores or between stores and head office warehouse / distributions centers</li> </ul>
Goods Receipt	<ul style="list-style-type: none"> <li>• Receive stock from unknown source (not based on a purchase order or stock transfer receipt)</li> <li>• Receiving items by scanning items</li> </ul>
Goods Issue	<ul style="list-style-type: none"> <li>• Issue stock to unknown source (not based on sale or stock transfer shipment)</li> </ul>
Requisition Management	<ul style="list-style-type: none"> <li>• Raise stock requisitions to head office or to other stores</li> <li>• Requisitions can be consolidated in a single stock transfer shipment</li> </ul>
Cycle Counting / Stock Take at store	<ul style="list-style-type: none"> <li>• Perform physical inventory counting at store</li> <li>• Barcode scan file can be imported to reconcile inventory</li> <li>• Perform stock take using barcode scanners</li> </ul>





Quick Facts - *Head Office / In-Store Management*

Feature	Functionality
Inter-Store Transactions	<ul style="list-style-type: none"> <li>• Visibility of stock across the retail chain</li> <li>• Book orders to be fulfilled by other stores</li> <li>• Perform sales refund from any store</li> <li>• Orders booked in SAP can be fulfilled from Retail Stores</li> </ul>
Customer Management	<ul style="list-style-type: none"> <li>• Setup customer database or synchronize from SAP</li> <li>• View credit limits, balances and customer contact information at the POS</li> <li>• Define multiple billing and shipping addresses for customers</li> <li>• Extend discount on items based on Customer Groups</li> <li>• Analyze customer buying habits using sales reports at the head office</li> </ul>
Customer Catalog	<ul style="list-style-type: none"> <li>• Manage customer catalog numbers in parallel to the product numbers</li> <li>• Use customer catalog numbers in sale transactions</li> </ul>
Pricing and Promotion Management	<ul style="list-style-type: none"> <li>• Tax Exclusive / Tax Inclusive Pricing</li> <li>• Store specific pricing</li> <li>• Period and Volume Discounts:</li> <li>• Special Prices for Business Partners</li> <li>• Discount Groups: Define discounts for Business Partners based on:               <ul style="list-style-type: none"> <li>- Item Groups</li> <li>- Item Manufacturers</li> </ul> </li> <li>• Define promotions to allow discounts for a specific quantity and/or combination of goods</li> <li>• Promotion based on sale totals</li> <li>• Happy hour based promotions</li> <li>• Define discounts based on:               <ul style="list-style-type: none"> <li>- Item Groups</li> <li>- Manufacturers</li> </ul> </li> </ul>
Loyalty Management	<ul style="list-style-type: none"> <li>• Setup and manage multiple loyalty schemes which assign points on customer purchases</li> <li>• Define ageing criteria for loyalty points</li> <li>• Redeem loyalty points against new customer purchases</li> <li>• Loyalty points can be redeemed across the network of stores</li> </ul>
Gift Cards / Certificates	<ul style="list-style-type: none"> <li>• Setup and manage multiple gift cards</li> <li>• Gift Cards can be sold and redeemed across the network of stores</li> <li>• Re-charge gift cards</li> <li>• Cash back on gift cards</li> <li>• Support for card or paper based gift cards</li> </ul>
Surcharges	<ul style="list-style-type: none"> <li>• Setup surcharges which can be applied as additional cost during sale transactions</li> </ul>
Up sells and Alternative Items	<ul style="list-style-type: none"> <li>• Assign item substitutes and up sell items</li> <li>• Up sell and alternate item recommendations automatically pop up on the POS</li> </ul>

Quick Facts - *Head Office / In-Store Management*

Feature	Functionality
Layaway Management	<ul style="list-style-type: none"> <li>• Create and maintain flexible layaway plans</li> <li>• Define installment count, minimum installment count, maximum installment count, layaway duration, and inventory issue method for layaway plans</li> </ul>
Cash and Till Management	<ul style="list-style-type: none"> <li>• Create and track the cash being disbursed and collected from each POS from the start till end of each day.</li> <li>• Maintain opening balances for each POS</li> <li>• Ensure till counts at various stages. This helps in auditing and reconciling the till amounts</li> <li>• Record Till Count variance and post variances in SAP Business One</li> </ul>
Sale Attributes	<ul style="list-style-type: none"> <li>• Collect special information at the POS register, e.g. zip codes for advertising effectiveness</li> </ul>
Events	<ul style="list-style-type: none"> <li>• Setup Events for grouping reports by events</li> </ul>
Franchisee Operations	<ul style="list-style-type: none"> <li>• iVend can be configured to operate in the following franchisee models:                             <ul style="list-style-type: none"> <li>• Company owned - franchisee operated</li> <li>• Franchisee owned - franchisee operated</li> </ul> </li> </ul>
Item Matrix	<ul style="list-style-type: none"> <li>• Integration with CitiXsys Item Matrix application. Item Matrix application allows you to define / manage items by attributes, such as Size, Color and Style</li> </ul>
Reporting	<ul style="list-style-type: none"> <li>• Generate reports to show sales breakdowns, identify slow-moving items, and check sales for any day—by store, item, Item Group, Customer, Customer Group or Sales Person</li> <li>• iVend provides multiple reports in the following categories:                             <ul style="list-style-type: none"> <li>• Sales Reports</li> <li>• Collection Reports</li> <li>• Inventory Reports</li> <li>• Fulfillment Reports</li> </ul> </li> <li>• Reports can be previewed on screen, printed, or exported to Office Excel, Office Word, and other applications and formats supported by the Microsoft Windows operating system</li> <li>• Ability to edit existing reports as per the user format</li> <li>• New reports can also be added using the custom reporting feature</li> </ul>
SAP Business One UDF Integration	<ul style="list-style-type: none"> <li>• Integrate SAP Business One UDFs on Business Partner Master Data and Item Master Data with iVend</li> </ul>



## Quick Facts - POS Operations



### Feature

### Functionality

Transaction Processing

- iVend POS can be used with both Keyboard and Touch Screen equipment.
- Speed transactions with touch-screen support and keyboard shortcuts.
- Following transactions are supported on the iVend POS:
  - Sale
  - Sale Return
  - Sale Exchange
  - Sales Order booking / Order fulfillment
  - Quotation / Convert quotation to Sales Order or Sale
  - Layaway booking / Layaway fulfillment
  - On Account Payment
  - Capturing Lost Sales
- Support for multiple transaction types in a single POS transaction, for example the user can execute a Sale, Sale Return in a single transaction.
- Visibility of inventory of all stores and warehouses at the POS
- iVend POS offers real – time inventory control.
- Automatic Barcode determination at POS: The system follows a sequence of methods in attempting to resolve a barcode to a product or a card swipe to a customer/security user stopping the search when it successfully matches them
- Display customer balance and credit limit on the POS
- Customer facing display
- Automatic price determination at POS
- Automatic Tax determination at POS
- Override price, discounts and taxes on the POS
- Easily look up quantity on hand and item attributes, as well as display a picture.
- Easily manage / create customer records from the POS
- Sale Refund without reference to a sale transaction
- Item description override on POS: Used for selling open items and special order items tied to a single item master record.
- Age verification: Items setup for age verification when selected on the POS will prompt the user for the date of birth during a sale transaction
- Ability to attach reason code to transactions: Based on the system setup the POS user can be prompted for a reason code for executing a specific transaction.
- Ability to add sale level comments at the POS. These comments can be printed on the receipt.
- Apply surcharges to POS transactions
- Prompt the user to book a Sales Order when the store is out of inventory
- Automatically lock the POS terminal when left idle.
- Customer credit limit check on POS
- Ability to suspend transactions and recall the suspended transactions
- Ability to void items or the complete POS transaction.
- Ability to attach different fulfillment plans to different Sales / Order items.
- Ability to re-print receipts to resolve disputes
- Build / Break down Kits in real-time on the POS



## Quick Facts - POS Operations

Feature	Functionality
Transaction Processing	<ul style="list-style-type: none"> <li>• Manager override for following scenarios:               <ul style="list-style-type: none"> <li>• Price Override at the item level can be done beyond the Price Override Limits</li> <li>• Discount override at the item / sale level can be done beyond the Maximum Discount allowed</li> <li>• Manager can unlock the POS once it gets locked on reaching the tippie point</li> <li>• Customer credit limit override</li> </ul> </li> <li>• Print Gift Receipt to be given with gift items</li> <li>• Facility for attaching Sales Person to Sale</li> <li>• Track and redeem customer loyalty points</li> </ul>
Payment Processing	<ul style="list-style-type: none"> <li>• Payments on the POS can be made by the following tenders:               <ul style="list-style-type: none"> <li>• Cash</li> <li>• Credit Card (Supports both online and offline authorization mode)</li> <li>• Debit Card</li> <li>• Check</li> <li>• Travelers Check</li> <li>• Voucher</li> <li>• On Account – This special tender enables the user to leave the payment amount on account</li> <li>• Gift Card</li> <li>• Loyalty Points</li> <li>• Custom tender – This special tender allows businesses to define their own financial instruments and control their integration with SAP</li> <li>• Store credit can be issued in case of refunds</li> </ul> </li> <li>• Support for the following Credit / Debit cards:               <ul style="list-style-type: none"> <li>• Master Card</li> <li>• Visa</li> <li>• Amex</li> <li>• Diners Club</li> <li>• Discover</li> <li>• JCB</li> <li>• Others – Payment by cards other than the above</li> </ul> </li> <li>• Collect payments by multiple tenders</li> <li>• Secure Credit Card authorizations: Eliminate losses due to unapproved or unauthorized credit card transactions.</li> <li>• Automatically update balance / change amount</li> <li>• Automatically update transactions with the default tender for change</li> <li>• Collect advance payment from customers</li> <li>• Transaction payments can be staggered across multiple transactions</li> <li>• Ability to print payment receipts</li> </ul>
Periodic Activities	<ul style="list-style-type: none"> <li>• Create and track the cash being disbursed and collected from each POS from the start till end of each day.</li> <li>• Maintain opening balances for each POS and ensure till counts at various stages.</li> <li>• Perform Cash In/Cash Out for the till at the POS</li> <li>• Facility to book petty expenses at the POS</li> <li>• Detailed Tender Counting for Credit Cards/ Debit Cards/ Voucher/ Check / Travelers Check</li> </ul>



## Contact us:

USA - New York  
Rockefeller Center, 7th Floor  
1230 Avenue of the Americas  
New York, Ny10020  
USA  
T: 1 212 745 1365  
F: 1 212 618 6309  
E: newyork@citixsys.com

Asia Pacific - Sydney  
Tower 2, Level 20  
201 Sussex Street  
Sydney NSW 2000  
Australia  
T: 61 2 9006 1616  
F: 61 2 9006 1515  
E: sydney@citixsys.com

EMEA - London  
Lakeside House  
1 Furzeground Way, Stockley Park  
Uxbridge UB11 1BD  
United Kingdom  
T: 44 0 207 193 5607  
F: 44 0 207 681 1016  
E: london@citixsys.com

USA - Chicago  
The Merc, West Loop, 22nd Floor  
30 South Wacker Drive  
Chicago, IL 60606  
USA  
T: 1 630 359 5956  
F: 1 630 303 9706  
E: chicago@citixsys.com

Asia Pacific - Melbourne  
Level 27, 525 Collins Street  
Rialto South Tower  
Melbourne 3000  
Australia  
T: 61 3 9935 2916  
F: 61 3 9935 2750  
E: melbourne@citixsys.com

India - New Delhi  
A-24/5, MCIE  
Mathura Road  
New Delhi 110044  
India  
T: 91 11 42696666  
F: 91 11 42696600  
E: newdelhi@citixsys.com

Canada - Toronto  
8th Floor  
2425 Matheson Blvd. East  
Mississauga, ON L4W 5K4  
Canada  
T: 1 905 361 2886  
F: 1 905 361 6401  
E: toronto@citixsys.com

Asia Pacific - Perth  
Level 29, Forrest Centre  
221 St Georges Tce  
Perth WA 6000  
Australia  
T: 61 8 9288 0662  
F: 61 8 9481 3177  
E: perth@citixsys.com

[www.citixsys.com](http://www.citixsys.com)