CONTROL – Point of Sale (POS)

INTRODUCTION

As a busy retailer with multiple stores, you're looking to streamline as many transactions as possible at the point-of-sale so your staff can spend time providing great customer service and closing sales. This is where CONTROL Point-of-Sale software, can assist.

CONTROL is also easy to use requiring minimal keystrokes for any operation across an extensive range of transactions from cash sales, gift vouchers and returns, to special customer orders, laybys, quotes, valuations, petty cash, and more.

The Point of Sale module also integrates fully with Merchandising, Inventory Management, Replenishment, Customer Relationship Management (CRM) and Accounting modules.

You can utilise CONTROL POS on any standard PC or specialised POS equipment, including touchscreen types, and can include a large variety of barcode scanners, docket printers, cash drawers, customer displays, magnetic card readers, etc.

In line with modern requirements, CONTROL POS can also operate on Ipads and Android tablets and even Iphones and Android phones.

The CONTROL POS module includes:

> Easy item selection
> Enquiry facilities
> Customer based functionality
> Item pricing and promotions
> Tendering
> Special product types
> Vouchers, including gift and promotion vouchers
> Returns
> Customer orders, and repair orders
> Deliveries
> Laybys (Layaways)
> Transaction docket printing
> Sales on Credit
> Quotations
> End-of-day functions
> User restrictions
> Management functions
> Store "Back-office functions
> Other features

CONTROL POS FEATURES

Item Selection made fast and easy

> Items can be selected by:
>   − Scanning a barcode (manufacturer's or internally printed barcode)
>   − Entering any part of the barcode, internal product code or supplier's product code
>   − Entering one more words or partial words, in any order, from the item description, (or "comment" field)
>   − Entry of one of the product groups that the item belongs to
>   − Or combinations of the above

> If the entered data results in more than one match, then a list of matching items complete with images of the items, if available, is displayed letting you choose the required item.

> If the selected item comes in multiple variations, e.g. multiple colours and/or sizes, then you are shown the list(s) of available variations and can choose specific option(s) from the list(s).

> Panels of buttons containing product images (or product names) can be displayed on a touch screen and you can choose one of these by simply pressing the appropriate button.

> If the button represents a single item, then that item is selected. If the image represents multiple items, then a new panel of product choices will be displayed.

> There is no limit to the level of nested item panels.

Provide great customer service with CONTROL's comprehensive Enquiry facilities such as:

> Stock availability in the current store and other stores, warehouses and associated companies

> Detailed notes on products e.g. warranty conditions, care instructions, etc.

> Associated products – other items in the family, spare parts, etc.

> Detailed notes on customers – you can also update notes at POS

> Details of other special customer orders for the selected customer

> Alternative/superseded product information

> Special customer pricing

Item Pricing and Promotions fully controlled across different stores

> The 'standard' price for an item can vary based on the store, the State, the customer purchasing the item or an a current promotion

> Prices can be inclusive of exclusive of tax. Tax rates can vary per store and specific items and customers can be set as tax exempt

> Promotions can be applied automatically
>
>   OR

> You can be prompted at the POS when the conditions of one or more promotions have been met. You

can then consult the customer to confirm that a promotion should be applied, and if more than one promotion is available, to choose one.

> Operator-initiated discounts and price overrides, either on a per line or whole transaction basis can be controlled in the following way:

– A discount beyond an individual sales assistant's limit (which may be zero) requires the authorization by a person that has the authority to give the discount.

– The maximum discount that can be offered may be based on the customer buying the item.

– The sales assistant can be forced to enter a discount reason for any operator initiated discount or price override.

Extensive Tendering facility

> Tender types can include:

– Cash,

– Credit and debit card (with accounting for both same day clearance and delayed payment),

– Integrated EFTPOS (There is no need to enter the amount in the credit/debit card machine)

– Foreign currency (definable currencies – with updateable exchange rates),

– Gift vouchers and gift cards

– Credit notes

– Finance company

– Cheque (option to record name and bank details for production of bank deposit slip), etc.

– User-defined tender types

– Provision for multiple tenders on one sale (split tendering).

– Additional credit cards details such as name can be captured by swiping the credit card in a card swipe device, or it can be entered via the keyboard.

– Discounts or surcharges can be applied based on credit card used.

– Vouchers and credit notes can be verified.

– Ability to have amounts tendered against special orders, laybys and charge sales.

– Certain tender types, for example a finance company credit card, can be configured as not providing immediate cleared funds. When this tender type is used, a sundry debtor invoice, including details of the sale, is generated on the related debtor, e.g. the finance company.

CONTROL easily enables a variety of 'Special Product' types

> You have access to full style colour and size (and sub-size) facilities. If you choose an item (style) that is available in multiple colours and/or sizes, CONTROL will prompt you to choose a colour and/or size. All colours and sizes can be the same price, or particular colours and/or sizes can have different prices.

> The entry of a valid serial number can be applied for items specified as serial numbered stock.

> You have the ability to sell product packages or kits made from other products. This includes configuration options that control whether kit components can be substituted at the time of recording a sale or customer order, and price adjustment of the package or kit based on the substituted components.

> You have the ability to sell a customised product by specifying a base product and then selecting from

lists of possible options or attributes.

> Services or generic products can be sold by selecting a representative product and then entering or modifying the product description and/or price.

> Groups of items can be configured so that when such an item is sold, you receive a message on the screen, e.g. 'don't forget to offer extended warranty with that item".

> The warranty period can be defined for a group of items. When one of these items is sold, CONTROL will calculate the warranty expiring date for the item sold.

> Items such as service or labour can be configured as non-diminishing, which means the quantity will never go below zero or appear on any re-order report.

> If you select a batch-controlled item and there is more than one batch currently with stock-on-hand, then you have to specify which batch the sold item is from.

Get the most out of Gift Vouchers and Gift Cards

> When selling a gift voucher or gift card, the details of the customer buying the gift voucher can be recorded.

> CONTROL provides for pre-numbered gift vouchers and gift cards, as well as system-generated gift voucher numbers.

> One or more gift vouchers and normal stock items can be sold in a single transaction.

> Gift cards with magnetic stripes can be scanned through a Magnetize Stripe Reader (MSR) to retrieve details of available balance, etc.

> Gift voucher and gift card number ranges can be assigned to each store and CONTROL will ensure that the number for a gift voucher being sold is within the designated range for the selling store.

> CONTROL provides facilities for checking the validity of a gift voucher number, regardless which store it was purchased or redeemed at.

> CONTROL includes multiple configuration options for handling partial redemption of a gift voucher including:

  – Maintaining the remaining balance on the gift voucher or gift card
  – Issuing a new voucher for the outstanding balance
  – Issuing change for the outstanding balance (provided it is less than a defined amount)
  – Writing-off the remaining balance.

> There is extensive back-office reporting of gift vouchers including:

  – Gift vouchers sold
  – Gift vouchers redeemed, including details of the (most recent) sale where the voucher was redeemed
  – Gift vouchers outstanding
  – Gift vouchers cancelled.

Use Discount Vouchers to increase sales

> Discount vouchers can be for a discount amount or a discount percentage.

> Discount vouchers can be generated as a result of a sale that meets the conditions of a discount voucher promotion.

> Discount vouchers can be delivered to a customer by SMS, MMS, and email or printed. If delivered by MMS then the barcode of the voucher number is sent as part of the MMS.
> Discount vouchers are validated at time of redemption, and can only be redeemed once.
> Groups of items can be excluded from the effect of a discount voucher.
> Sales assistants or managers with appropriate authorisation level can override the total value of a transaction or apply an overall discount.
> When the transaction is completed, overall discounts will be applied on a pro-rata basis across all discountable items.
> Reporting for discount vouchers is similar to the reporting available for gift vouchers

Ensure correct policies and procedures are followed with Returns

> Processing returns can be as simple as:
>> – Scanning the barcode at the bottom of the original sale docket
>> – Choosing from a list of allowable return reasons and keying in additional return reason details, if required
>> – Reviewing and possibly modifying the details recalled from the original sale, including any special pricing or discounts that may have been given
>> – Finalising the return as a credit voucher, or refund the amount(s) tendered on the original sale
>> – Asking the customer to sign a copy of the printed return docket
> Depending on the return reason selected, CONTROL may place the returned item into a location other than the current store's saleable stock. For example, if the return reason is "Faulty item", instead of the item being returned to saleable stock it is placed in the "faulty stock" location.
> If the original sale number is not known, depending on company policy, a return can be processed without reference to the original sale transaction; or easy-to-use search facilities are provided to find the original sales transaction by customer or by stock item.
> Refunds beyond an individual sales assistant's limit (which may be zero) require the authorisation by a staff member with the appropriate level of authority.
> CONTROL can be configured to require the entry of the customer's name and address as part of the return transaction, and/or to require the customer's signature on a copy of the return docket.
> CONTROL can be configured to allow for an item to be sold while processing a return, e.g. it is an exchange transaction, or a returned item can be processed during a sales transaction.
> Items can be marked as non-returnable.
> Items can be marked as rental, in which case when they are returned the rental fee is not refundable (the security deposit may still be refundable).
> Personnel can be prompted with a special message when certain items are returned, e.g. "check all components are in the box".

Increase visibility, management and control over multi-stores and stock location

CONTROL can be configured to provide:
> Details of stock availability in other stores and warehouses.
> Selection of another store or warehouse for fulfillment of one or more items on a customer order (or sale)

Authorised personnel can:

> Process a transfer to another store or a warehouse, producing the required documentation.

> Generate a transfer request on another store or a warehouse.

> Receive stock sent from another store, a warehouse or from a supplier.

Easy-to-use yet advanced Customer Order and Repair Order facility

> To reduce training requirements and errors, customer order and repair order entry is very similar to sales and other transaction entry.

> Specifics of an item can be recorded by selecting the item and then choosing from the lists of options available, or if allowed, by altering the description of the item. Any altered description will only affect the current transaction.

> Other special requirements can be recorded by adding detailed notes or even images (diagrams, etc.) to the order.

> An online "form" containing the additional details that need to be recorded for a repair order (e.g. condition of item being repaired, any accessories attached, etc.) can be completely configured without any programming.

> CONTROL will calculate a default order completion date, which can be altered if required. CONTROL can be configured to allow order completion dates to be specified per line.

> For items available in multiple options, after choosing such an item, you are prompted to select from the list(s) of available options. The price of the item is determined after all the options have been selected.

> While entering a customer order line you can:
  – Commit stock on hand to the customer order line,
  – Commit stock on purchase order that is not already committed to other customer orders, to this customer order line
  – Not commit any stock to the customer order line

> Customers can be automatically notified by SMS or email of a change in their customer order, .e.g. when the customer order is ready for collection.

> CONTROL allows for a customer order to be cloned and altered. For example, a stationery supplier creates a "standard" customer order for the stationery requirements for students for each year of the local primary school. If a parent of a year 6 student contacts the stationery supplier, they clone the "standard" order for year 6 and make alterations if required (and take payment for the customer specific order). The order can be assembled and then sent to the school, or picked up by the parent.

> Items can be marked as "taken" while entering the customer order. After completion of the customer order, including taking a payment and printing the details of the customer order (including the items marked as taken), the taken items will then be marked as sold and no longer outstanding in the customer order.

> The status of customer and repair orders can be maintained, queried and reported on by the various staff responsible for the customer orders and repair orders.

> Supplier purchase orders or inter-location (store to warehouse) transfer requests can be generated to fill customer orders.

> When processing stock received from a supplier, warehouse or other stores, you are prompted when processing an item required for a customer order, and the subsequent receipts summary will include

details of all customer orders waiting for the items just received.

> Depending on management policy, customer orders can be part supplied.

> Powerful yet easy-to-use customer order/purchase order enquiry facilities are available to authorised personnel.

> Comprehensive reporting of customer orders is available, including outstanding customer orders sorted by transaction date or due date; orders ready to finalise; part-supplied orders, etc.

> Orders placed through our integrated online e-store will appear as fully paid customer orders, and can be handled like any other customer order.

> When a customer order is cancelled, a cancellation fee can be calculated based on configuration parameters and deducted from the payments made. The balance of the amounts paid can be refunded to the customer or a credit voucher generated for the balance.

Ensure accurate, prompt and quality delivery service

> When items are due for delivery, the delivery address, delivery method and special delivery instructions can be retrieved from the customer record, if their details exist, or they can be entered or altered for a specific delivery.

> Corporate customers can have multiple delivery addresses established in the system.

> The total weight and or size (volume) of a transaction can be calculated and displayed while the transaction is being entered.

> You can enter a delivery charge or CONTROL can suggest a delivery charge based on the delivery zone, the total weight or size of the items to be delivered, or a combination of these. This delivery charge can be modified by you.

> The current delivery schedule can be reviewed before you add a new customer order to the schedule.

> Customer orders in the delivery schedule will be sorted by the "zone" (could be postcode) of the delivery addresses.

Easy-to-apply, Laybys (Layaways)

> Options exist to allow the "sale" to have occurred at the start or the completion of a Layby (the layby could be considered to have occurred at commencement for store performance reporting, but at the completion for tax purposes).

> A sale transaction can be converted to a layby at any time before the sale is completed.

> Items on layby are not available for sale to another customer.

> CONTROL allows automatic calculation of required deposit amount with the ability to override this.

> Automatic calculation of layby finalisation date also comes with the ability to override within definable limits.

> Other options include ability for partial pickups and to add items to an existing layby, with CONTROL suggesting any required additional deposit amount to maintain required deposit percentage.

> The layby docket includes the layby terms, completion date and the calculated minimum weekly payment.

> Layby arrears report is available (to authorised people) in store and/or at head office.

> If required, the layby items can be returned to stock without cancelling the layby.

> When a layby is cancelled, a cancellation fee can be calculated based on configuration parameters and deducted from the payments made. The balance of the amounts paid can be refunded to the customer or a credit voucher generated for the balance.

Sophisticated transaction docket printing

> Transaction dockets can be printed on a variety of printers, including continuous roll printers.

> There are a number of "standard" docket layouts, which can be customised to suit individual requirements.

> Special conditions and messages can be specified for each transaction type, for example a sale may include a sales message and returns conditions; a special customer order could include conditions relating to that transaction type.

> Special notes can be pre-recorded and any one of these can be printed on selected dockets. (E.g. for special warranty conditions, product care details, etc.)

> The docket style and printer used can be dependent on the type of the transaction, e.g. cash sales are printed on a continuous roll printer, but customer orders can be printed on a laser printer in an A4 layout.

> The number of copies can be configured for each transaction type.

> The operator can select to reprint a copy of the most recent transaction, or tend a copy by email with all copies clearly marked as such.

> Authorised staff can reprint or email copies of previous transactions.

Manage 'Credit Control' with ease

Selected customers may have a specified credit limit allowing them to buy on credit, i.e. receive goods before payment.

A customer's credit status is checked as their account is selected and as each line is entered. Credit checks cover:

> current account balance against credit limit

> the number of days current invoices are outstanding

> whether the customer has been flagged as being on "hold supply"

CONTROL ensures only customers that have a defined credit limit and good credit status can buy on credit.

Easily provide quotes and convert to sales

CONTROL comes with a full quotation system which includes the ability to convert a quotation into a customer order or a sale. Quotations can include a quote expiry date.

Streamlined, End-of-Day functions

End of Day balancing includes the following:

> Cash Declaration and Balancing by till, cashier or any group of these.

> Cash declaration simply requires the entry of the count of each denomination.

> CONTROL supports a fixed or variable float per till.

> Redeemed gift vouchers and credit notes are auto-balanced.

> There is provision to enter notes, either for providing an explanation for a variance, or for recording any important items that may have affected trading, e.g. the weather.

> A variety of daily reports are available. These can be selected manually or run automatically.

> A customer (footfall) count can be entered, and then reporting of sales value per footfall, etc. is available.

Restrict or authorise staff

Depending on configuration options, a variety of restrictions can apply, including:

> Enter only certain transaction types

> Only operate in a specified store

> Limited or no ability to give a discount

> Limited or no ability to process a return

> Disallow altering of details of existing customers

> Disallow altering or cancelling a transaction after it is commence

Authorise managers

Managers can be authorised to perform some of the following functions:

> Reprint a sale or other transactions

> Enter the transaction date (for entering sales that were transacted away from the POS system)

> View the gross profit while preparing a quote or special customer order

> Enter petty cash details

> Perform a cash pick-up

> Open the cash drawer without tendering

Other helpful features

> A transaction can be suspended, other functions performed, then the suspended transaction recalled for completion. Transactions can be suspended on one workstation and recalled on another, by the same or different person. There is no limit to the number of transactions that can be suspended. CONTROL can be configured to automatically cancel suspended transactions at the end of the day.

> Notes can be added to individual transaction lines or to the overall transaction.

> CONTROL comes with password control for access to store manager functions.

> You can utilise an operator code for each entry or operate in cashier mode.

> CONTROL has the ability to record the operator, salesperson and authorising person on a transaction.
> Operators can be required to complete survey questions at the end of each sale. Examples of survey questions might be:
>   – Postal code
>   – Gender of customer
>   – Approximate age group of the customer
> Hundreds of configuration options allow the Point-of-Service module to be tailored to individual requirements without programming.

'Back-Office' features provide high-level management control

Back-office features include all functions that are not customer facing, such as:

> quick and simple sign-on and sign-off function (providing attendance reporting to management)
> simple till balancing and production of bank deposit slips (including the ability to consolidate multiple tills)
> selected operational reports such as overdue laybys, customer orders not picked up, etc.
> selected in-store performance reports.
> simple processing of stock receipts and transfers to other stores, including the production of transfer dockets
> Complete physical stocktake functions, including performing the count using a hand held data capture device, complete with barcode scanner.

In addition, any other part of the complete CONTROL ERP solution can be run in the store if required.

SUMMARY

CONTROL is an all-compassing POS system designed for the modern retailer looking for complete operational support on the shopfloor and at the backend. While a sophisticated POS that effortlessly handles multi-store operations and specialised retail sector requirements, CONTROL is also easy to use, and minimises staff transaction times, freeing them to spend more time selling to and servicing customers. Additionally, management features ensure your retail stores run efficiently so you can work on your business and not in your business.

Significantly, CONTROL POS has been designed by Creative Computing, a retail software vendor of more than 25 years where we aim to deliver practical retail software innovations that assist retailers to compete better locally and internationally.