

Features of ***Portal Store Front (PSF)***

1 Overview

Portal Store Front (PSF) provides you with a world-class solution for multiple retail stores scenario. It is an application offering the best of POS and CRM functions seamlessly integrated with Movex ERP. Being developed in Java, PSF is platform independent and can run smoothly on any platform.

2 General Information

The solution provides much better functionality than typical billing software. PSF will bill the customers at cash counters for the goods purchased by them. In addition to this, advance orders can also be booked through the software. PSF also allows accepting sales returns on the counter. Apart from these transactions it gives details about the availability of items in another shop in the chain, report on on-hand balance of items in various shops, daily counter collection and sales reports and statistics.

The system can be linked to peripheral devices such as Bar code scanner & swipe card machine, cash drawer, LED unit for enhancing the working of POS, speeding up the procedure and reducing human errors.

3 Concept

Portal Store Front with Movex Customer Order Management (COM) integration replicates most of the masters from Movex and thus avoiding duplication of data entry on two systems. PSF is designed keeping in mind the requirement of speedy and easy to use operations at the billing counter. The stress is given to minimize the keystrokes while billing. To improve the speed, it is designed to work on client-server technology. Being capable of working in a multi stores (multi-location) environment, reporting at stores level as well as consolidated reports at h/o is possible.

Apart from just being billing software PSF also allows accepting sales returns on the counter. It gives details about the availability of items in another shop in the chain. The system is linked to peripheral devices such as Bar code scanner & swipe card machine, cash drawer, LED unit for enhancing the working of POS, speeding up the procedure and reducing human errors.

The new version of PSF gives stress on the Customer Relationship Management (CRM) considering the current trend and competition in the retail industry. No one can stop the retailer from being successful who provides his customers with the best of services and personal attention. PSF helps the retailer to maintain better relationships with his customers and thus improving the goodwill of his store.

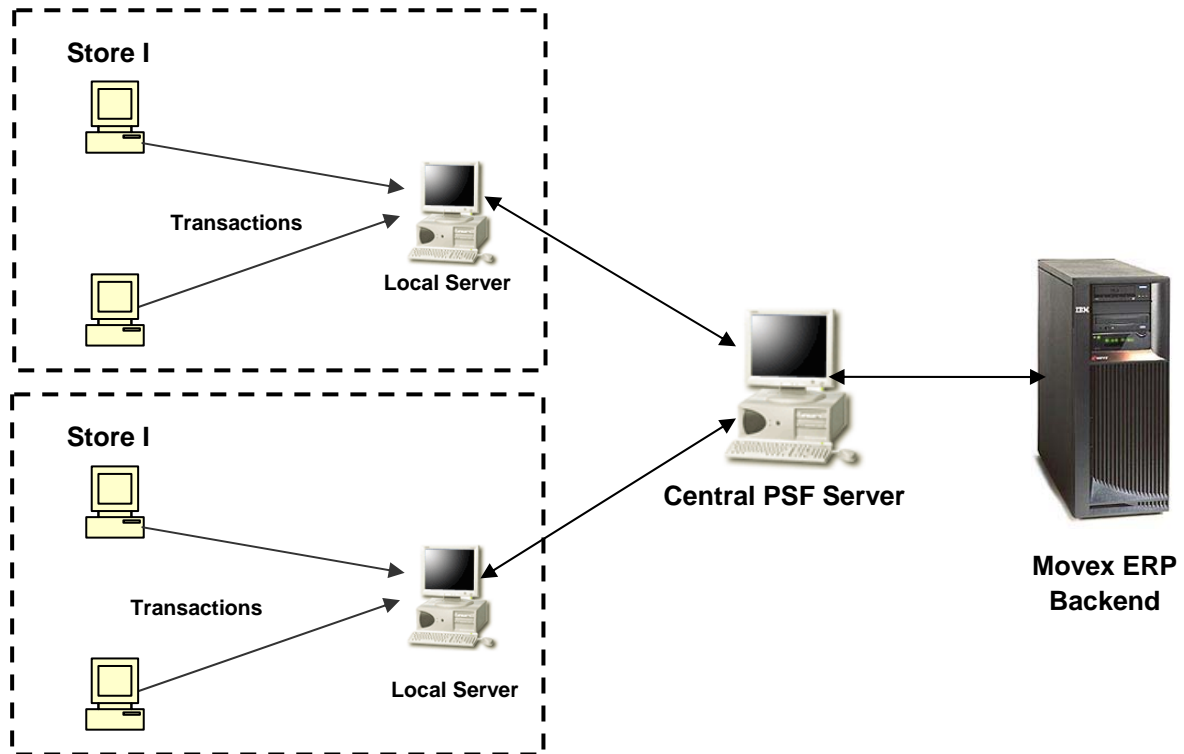
The PSF consist of two separate applications

- PSF Server
- PSF Client.

PSF Client does only the billing process, while the rest of the Administrative and Reporting tasks are performed on the PSF Server.

3.1 A Multi-Store PSF Solution

Explained below is a sample network diagram for a multi-store PSF solution.



4 Product Features

PSF is a multi-store (multi-warehouse), multi-location, language independent application.

4.1 The PSF Server

PSF server performs administrative activities. This server can either be a local PSF Server or the Central PSF Server. There is a constant integration between the local PSF Server and the PSF Clients. It takes the entire load from the PSF clients relieving the PSF clients to concentrate only on billing. This ultimately helps in improving the PSF Client performance. The PSF server application contains Master maintenance, reporting and data transfer modules between the central PSF Server and the PSF Server local to each store.

4.2 PSF Server Features

The PSF Server performs the backend administrative functions. As the PSF Server is different software from the PSF Client it has to be installed on a different server configuration machine. This server can either be a local PSF server for each store or the server can be centrally located with a higher end hardware configuration. The PSF provides the PSF server administrator with the partial list of following functionalities.

4.2.1 Administrative Functions

Administrative functions include effective tools to maintain the PSF master data, setting up user authorizations to various modules and functions, Inventory control, data transfers and generating MIS reports.

4.2.1.1 Master Maintenance

This module provides the administrator with a functionality to maintain and configure the PSF masters. These include

- User
- User Group
- Functions
- Modules
- User – Function Authorization
- User – Module Authorization
- User Group – Function Authorization
- User Group – Module Authorization
- Loyalty Schemes

4.2.1.1.1 Discount/Schemes Master

Various discount schemes can be handled by PSF. All such schemes are defined on Movex and then replicated on PSF. To list a few...

- Buy one / multiple quantity of an item and get one free
- Buy one / multiple quantity of an item and get discount in percentage
- Buy one / multiple quantity of an item and get discount in value
- Buy one / multiple quantity of an item and get any one items of a group free / discounted in percentage or value.
- Buy one / multiple quantity of an item and get n numbers of any item from Item group/product group free
- Buy one / multiple quantity of an item and get unlimited numbers of any item from Item group/product group at Discounted Price
- Discount Upto x% offered on All Items and additional y% on select Items
- Discount Upto x% offered on all Items and overridden by y% on specific Items

4.2.1.1.2 Loyalty Schemes

The administrator can define various loyalty schemes for giving CRM functionality to the application.

Here the administrator can

- Define Loyalty Schemes
 - Customer specific Schemes
 - Item Specific Schemes
 - Schemes to work on any one of the following criteria's
 - Customer Group
 - Customer Class
 - Item Group
 - Item type
 - Business Area

- District
 - Define Loyalty point Earning factors
 - Define the number of points to be earned for a range of amount, quantity or ratio (for purchase of every xxx amount, get yy points)
 - Define Loyalty points redeeming factors
 - Defining each points worth in the local currency

4.2.1.2 Inquiry

To respond quickly and effectively to the customer queries, PSF provides an option of on-line inquiry. PSF database can be inquired for

4.2.1.2.1 Customer Search

Customer's data can be searched on various search criteria provided on PSF. If a customer wants to know his Loyalty Point Balance, simply click this module on PSF server and update customer with his point balance!

4.2.1.2.2 Item Search

You have a customer inquiring for the availability of a specific item? Or someone interested in a particular type of product. Here is an option available to answer his query. PSF provides sufficient number of search criteria to look for the desired product. You can also view the availability of the required item in any of your branch store and thus make sure that you don't lose your valuable customer.

4.2.2 Security

This model lets the administrator to relate masters to define new functionalities. These include

- Authorize user and user groups to various modules
- Authorize users and user groups to various functions

4.2.3 Data Transfer

For PSF to work on a multi-store scenario the data has to be properly shared between different stores for having a centralized database for Inventory, Transactions and CRM data.

There are two types of data transfers, which are possible

- Data transfer between central PSF Server and Movex

The following Movex Masters are replicated from Movex to Central PSF Server.

- Company Master
- Division Master
- Facility Master
- Warehouse Master
- System Table
- Warehouse Address Master
- Item Master
- Customer Master
- Inventory
- Charges
- Discounts
- Number Series
- Order Type

- Data transfer between PSF servers local to each of the stores and the Central PSF Server. The administrator is provided with a feature for either transferring the entire database or transferring only incremental data.

4.2.4 Reports

PSF server provides the following types of MIS reports.

- Daily sales report
- Daily sales payment mode wise
- Daily sales currency wise
- Daily sales counter wise
- Sales reports for a specified period of time
 - Sales report Item type wise
 - Sales report Item group wise
 - Sales report Customer wise
- Sales report on discounted items
- Sales tax report

4.3 PSF Client Features

The PSF Client software provides functionality limited only to the billing process in a retail environment.

4.3.1 Quick Entry

The name “Quick Entry” itself suggests that this type of a billing process provides a quick order processing. This is achieved by keeping the keystrokes at minimum. The Quick Entry module provides with the following functionality

- Billing at 2 key strokes
- Accept payments in multiple modes.

This type of a billing process is defined for a “WALKIN” type of a customer only. Default discounts and charges attached to an Item or the Order type or the Customer, are retrieved and calculated. The following are the modes of payment, which can be used for Quick Entry

- Local Cash
- Gift Voucher

This payment mode activated only if included in the client configuration.

4.3.2 Detail Entry

Detail Entry is another type of order entry, which provides the counter user with much more options than the Quick entry order type. The detail entry option is useful to bill the preferred customer where in the charges and discounts retrieved by default need to be altered. Here unlike the Quick entry, counter user can edit the charges and discounts for the invoice either on the line level or the header level.

Detail Entry module provides all the payment modes as mentioned earlier in Quick Entry along with some more like

- Cheque Payment
- Demand Draft
- Loyalty Points

4.3.3 Advance order

PSF provides certain feature to place an order for an item even when the item is out of stock. All such orders are registered under Advance Orders. Advance order has the following features.

- Book orders for out of stock items
- Part payments accepted
- Make full payment at the time of delivery
- Capture customer information
- Allocate Item lots at the time of delivery
- Accept multiple delivery dates item wise.

All the payment modes supported by Detail entry can be used for advance order and advance order invoices.

4.3.4 Sales Returns

Sales return is the main and the most curtail functionality for any retail business. PSF provides with a very basic but customizable functionality in Sales Return. It supports

4.3.5 Day End

Here the counter operator submits his closing balance at shift end or day end by returning amount collected in cash payments for various currencies.

4.4 PSF Configuration

To provide flexibility to setup PSF Client and Server, many options are kept configurable. This helps in building up requirement specific to PSF. Some of the major configuration parameters are discussed below:

4.4.1.1 Counter ID

PSF identifies each counter with its unique counter id. This is very important when the amount collected from the counter is to be tallied against the invoices generated through the counter. This also ensures strict security level.

4.4.1.2 Default Customer for Order entry

The customer set in this parameter would be proposed as the default customer for all the order entry types. In case of Detail entry and Advance Order a provision to change the customer id is provided.

4.4.1.3 Database

This parameter decides which SQL server database to connect to from the PSF Client. This server would be either the local PSF server or the central PSF Server. Information about which server to connect to for data transfer, is also set in these parameters.

In case the Central PSF Server is integrated with an ERP backend configuration parameters specifying the ERP systems name, Server address etc have also to be configured.

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