

StoreFlow Sales Management Application

Functional Overview

StoreFlow® Sales Management is designed for large sales areas, department stores, and chain stores that require consolidated data in real time. Data generated through StoreFlow Point of Sales (POS) is automatically updated by StoreFlow Sales Management. The result? Accurate sales information is immediately available.

The solution core controls the parameters, data maintenance and consolidation, daily reports, process control, application access control, transaction processing, issuing shelf labels, and controlling sale items.

Additional modules can be integrated to enable transaction inquiry, on-line preparation of executive sales information, treasury control, presence control, local warehouse management, electronic payment management, and linkage to headquarters.

The StoreFlow Sales Management structure is modular in design. Each module is designed to include a set of similar functions, grouped together in user-configurable folders which include all the appropriate programs. For retailers' flexibility, programs can be transferred freely between folders in the same module.

The standard configuration of Sales Management includes several modules.

Basic Module

Basic

Additional Modules

Utilities

Administrative-Financial Management (this includes invoicing)

Scales

Loyalty-Building

Goods Management

Labels

Other StoreFlow applications associated with Sales Management

EFT (StoreFlow Electronic Payment System)

Price Lookup (StoreFlow Price Lookup System)

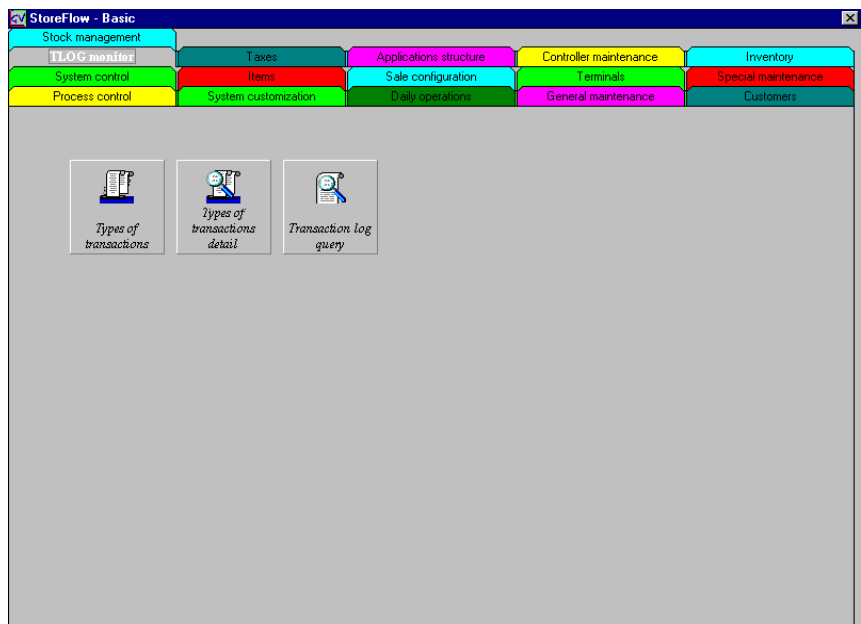
Basic Module

System Configuration and Customization

System Configuration and Customization includes all of the functions related to system definition and configuration changes. The following aspects can be configured or customized: types of existing customers, taxes, company organization, companies with which business is conducted, POS terminal programmable keys, graphical user interface and names of the terminal functions.

Maintenance and Querying

Maintenance and Querying groups functions related to maintenance, querying and control. This enables querying the status of terminals, querying cancelled transactions, and the maintenance of terminals and the transaction log.



Item Management

Item Management groups item maintenance functions such as encoding into different EAN families, launching special offers and promotions, definition and querying of the existing sectors, generation of shelf labels, item price change, and family/grouping creation.

Customer Management

The Customer Management function enables customer processing and identifying customer parameters such as the cards they use, individual credit situations, customer blacklists, etc.

Stock and Inventory Management

The Stock and Inventory Management function includes a collection of programs used for basic stock management. The programs enable the user to define the type of existing movements and their diminishing, neutral or increasing result on the inventory, look up status, as well as open and close the inventory.

Groups of Functions

The following list groups together the various similar functions available in the basic module. The user's specific configuration may be different from the one indicated below.

Process Control

System Control

Application Structure

System Parameterization

Sale Configuration

Daily Operations

Groups of Functions (continued)

TLog Monitor

General Maintenance

Special Maintenance

Items

Customers

Terminals

Stock Management

Taxes

Inventory Monitor

Extended Modules

Utilities

The utilities module includes programs that provide management facilities, basically for the system processes and the messages displayed by the POS terminals. This module includes Version Control, POS terminal messages, Query Generation, and Process Analysis.

Administrative-Financial Management

The Administrative-Financial Management module incorporates the highest-level executive tasks available in Sales Management regarding control and definition of cash withdrawals, control and definition of sales, and sales querying in real time and by differing time intervals. It also includes advanced invoicing functions. Functions included in the module include Cash Differences, Sales Queries, Cash Withdrawals, Executive Sales Information, and Invoicing.

Scales

The Scales module is designed for customers utilizing electronic scales which are capable of not only weighing, but of managing unit items for which a ticket is generated and then invoiced at the POS terminal. Each of the scales is installed on, or assigned to, a counter, in the same way as individual POS terminals are assigned to an environment.

The Scales module includes the following programs:
Maintenance of salespeople, counters, scales, equipment, headers-legends, keys, and free PLUs; on-line price changes; history file querying; scale monitoring and protocols.

Loyalty Building

The Loyalty-Building module fulfills retailers' need for winning and retaining customers by incorporating the most often used functions of loyalty-building. StoreFlow Sales Management Loyalty Building module not only enables this effort, but simplifies it for retailers.

The Loyalty-Building module includes the following features.

Different types of loyalty-building campaigns

Customer data management

Management of discounted points obtained by customers

Data on prizes for the loyalty building campaign

Data on a customer's accrued points and prizes obtained

Listing and printing of the information for the features above.

These features are supported by a number of processes that are described below and which are available only when the Loyalty-Building module has been installed in the system.

Main Functions in the Loyalty-Building Module

Loyalty-Building Campaign Management

Registrations, activation and termination of loyalty-building campaigns, which are always associated with a campaign start and end date. Campaigns are defined for one of the pre-established modes (PLU points, customers, special offers, etc.)

Customer Management

Management (registration, deletion, modification) of the store's regular customers and their associated data, which can be personal or economic. The user can also query the number of points accrued by customer, conduct searches based on the accrued purchases by period, and apply customized discounts.

Item Management

Specific items can be associated with loyalty-building campaigns. Each item can have an associated number of points (e.g., store vouchers) which are obtained when that item is purchased and may vary based on the company, department, and item family to which it belongs.

Prize Management

This program is used for creating, querying and managing the prizes related to a particular campaign. Each prize has a specific number of associated points which must be accrued in order for it to be obtained by the customer.

Point and Prize Management by Customer

This program enables the user to query the number of points accrued for purchases made by the customer (prize history log) and exchange these points for the corresponding prizes. It also offers an option for querying the prizes obtained in the past.

Goods Management

Goods Management is a Sales Management module designed for handling all aspects related to the logistics of goods in companies with chains of multiple stores or outlets.

Basic tasks addressed by Goods Management

Inventories/counts

This includes functions such as opening and closing of inventory operations, making adjustments, managing the inventory server, and maintaining the locations in a store.

Physical Management of Orders and Goods

This function allows physical management of orders and goods in the company in general and for each store in particular. This includes functions such as managing orders placed with suppliers, capturing delivery notes, and defining formats for available goods.

Statistics

This function generates statistical information on the status of the store's inventory.

These main areas are described on the following page along with the functions offered by the application.

In large companies, stocktaking and managing orders and goods are tasks that can be subdivided into several, smaller chores. These subtasks or basic tasks correspond to the basic functions of Goods Management which are described in the following paragraphs.

Area Maintenance

This enables the areas existing in a store to be registered, deleted and managed. The areas are used as a descriptive element for locating the items in specific places in the store. Areas usually correspond to level number 3 of a company's organization description, while levels 1 and 2 correspond to the building and the floor.

Location Maintenance

The physical design of a store can be accomplished by defining locations through this process. A full location consists of an aisle, a shelf or stand height where the products are displayed, and positions or spaces within each shelf.

Merchandise Transfers Between Areas

This process allows merchandise to be moved between different areas within a store. Merchandise transfers between areas are essential for meeting demand peaks, for instance.

Goods Management does not permit merchandise transfers between different companies in the same chain.

Adjustment Group Maintenance

Adjustment groups are associations of types of adjustments. An adjustment is the difference between a store's inventory and the quantities shown in the corresponding table. When carrying out stocktaking operations, it is necessary to associate the discrepancies by types and form adjustment groups. The types of adjustments can be managed from the Stock Movement Maintenance program.

Supplier Maintenance

This can be used for maintaining the table of existing suppliers and their associated data, such as their ID code, company name or contact telephone number.

Item Catalog Maintenance

The catalog includes items provided by suppliers. This function enables different operations to be performed with the item catalogs, such as associate items with catalog lines, query the database, etc.

Merchandise Format Maintenance

This function can be used for managing merchandise formats. A merchandise format is a grouping of units of the same item contained in a packaging (i.e., a type of presentation for the same item or product).

Order Maintenance

This function can be used for making order proposals to suppliers, which will later be accepted or rejected when the order is placed physically. Goods Management allows orders to be captured manually, externally or automatically. The two latter options can only be generated from one of the application's client stations. Orders can be generated at a POS terminal and then captured at the server, or the automatic mode can be chosen instead to enable orders to be placed automatically from the server based on parameters chosen by the user (minimum stock, ordering point, stock evolution, etc.)

Goods Management includes a module that enables lists of orders to be generated according to various selection criteria

Delivery Note Management

Receipts of goods are one of the variables affecting stock control. This function can be used for transferring to the system all of the data of the delivery notes provided by the suppliers when they release their merchandise. Delivery notes can be captured manually or from an externally-originated ASCII file.

Inventory Management

These functions are used for performing stocktaking tasks in a store. Normally, two types of inventory exist: the inventory proper and the counts which are affected in the store either manually or by means of a reading gun in order to transmit the data from the POS terminal to Sales Management. The data is recorded in a file named ILOG, which may be loaded later.

In order to perform the stocktaking operation, an inventory must be created first, counts must be affected next, and finally any adjustments must be made to reflect any discrepancy between the inventory obtained and the actual stock that exists in the store.

Labels

The Labels module is identical for the StoreFlow Sales Management and StoreFlow Point of Sale applications. Since it is divided into Design and Print functions, a usual option is to install the Label design part in the central office and the Label printing part in the respective centers.

The Labels module enables the user to generate shelf labels, item labels, and even some of the store's promotional posters.

The Main Features of the Labels Module

Label design fully defined by the user

Possibility of designing formulas

Use of different label formats for the same item and depending on the center where they will be displayed

Support for the most popular label printers available on the market or any Windows printer, thanks to the drivers included in the standard package

Possibility of choosing the label or page form from among 53 predefined models or creating a customized design

Printing of the main standard bar codes (multi-row, two-dimensional, linear)

EFT

The functions built into this new version of EFT provide comprehensive management of transactions executed through electronic payment means.

Main Functions of EFT

System Configuration and Administration

Maintenance of System Element including existing point-of-sale terminals, supported cards and payment documents, card acceptance centers from which verification will be requested, and communication links

Connection Test

Totals Querying and Listings

Price Checker

The Price Checker module allows configuration or terminal startup and shutdown, manual or automatic enablement of terminals, message maintenance, and report display.