

Sage Line 500 - Point of Sale

This is an additional module for use with the Telesales modules. It offers functionality for Point of Sale and Mail Order operations.

Records Kept

Payment types

- Define which payment types you accept, for example cheque or VISA.

Credit cards

- Record the credit cards you accept and the range of valid numbers.
- Define whether to use the additional verification codes.

Tasks Supported

Record payment details

- Record up to five payment transactions and associated details for each order.
- These may include cheques, credit card payments, cheques or other 'cash' type payments.
- Use these to produce reports to reconcile payments from banks (i.e. Credit Cards) with bank details.

Handle counter sales

- Process orders against a generic customer account.
- At the end of order entry:
 - Enter customer name and delivery address and optionally record this for marketing purposes by creating a Telesales customer record.
 - Enter up to five payment details. The values must add up to the order value.
 - Where any one of the payments is by credit card, validate on-line by passing details to a third party PC credit card validation package, receiving a rejection or authorisation status.
 - Once credit details are validated, confirm the order and produce a despatch note and an instant invoice.

Handle mail orders

- As for counter sales, process orders against a generic customer account and enter payment details at the end of order entry, including customer name and address.
- Optionally, create an Accounts Receivable customer record using a fast track customer entry screen at the end of the process.
- Follow one of two routes to complete the order cycle:
 - Perform on-line authorisation for credit card payments, confirm the order and produce an instant despatch note and invoice.
 - Place the order on hold for overnight processing of the credit card payments. Authorised orders are flagged and released for despatch. Produce the invoice by carrying out the despatch/confirmation/invoice spooling in a single step.

Process telephone orders

- Where incoming call recognition is available, transfer the telephone number directly to the system to identify the customer account.
- The proposed solution involves using the TSAPI or TAPI standard for this connection.

Autodial customers

- Using existing Telesales functionality to prompt the operator with details of the next call, including the telephone number. Output this number to the telephone system, which would then dial the number and route the call through to the appropriate internal telephone extension.

Housekeeping

- Clear down payment details.

Integration with other modules

Telesales

- All orders are entered via the Telesales module.

Sales Order Processing

- Record full sales analysis information, allowing the standard system analysis tools to be used.

Accounts Receivable

- Optionally, create new customer records from details taken at point of sale.
- Post invoices, either to a generic customer account or to an actual account.
- Post the cash batches created from the credit card process.

Inventory Control

- View stock status as the order is entered.
- Update stock when the order is despatched.

Third party credit card validation software

- Use a standard PC-based credit card system, linked to the bank for on-line authorization and overnight processing of transactions. Currently the system supports Commidea products.

Third party POS terminal

- Use either a dumb terminal, a PC or a purpose designed POS till, running Windows or NT as the client to the Sage system. The Omron RS650 PC-POS system is an example.

Third party telephony equipment

- Any PABX system that can identify and send the telephone number of the incoming call may be used to feed the system.

Features for international use

- Orders may be taken in any of the currencies defined in the system.

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