K8 summary factsheet

Kerridge
Commercial Systems

Offline Point of Sale for K8 - Key functionality summarized

This document summarizes the functionality available within Offline Point of Sale for K8 (OfflinePOS)

General

OfflinePOS enables a business to continue to trade at the counter when connectivity to the main K8 server has been lost. It provides facilities to capture both cash and collect sales for consumers and trade account holders within the POS interface. Payments for these sales may also be captured manually against each transaction.

Credit notes may also be entered, and goods returned within OfflinePOS, although note that these transactions will not be validated against the original sale. Values and products may need to be checked off against the receipt provided by the customer.

OfflinePOS is configured onto a Windows server that will be hosted by each customer on their premises. The application is hosted within a virtual machine and utilizes the Postgress database. It is designed to synchronize key data with the K8 server on a timed basis when it is online. These data elements include:

- Customer account details, excluding transactions
- Product details, including barcodes
- Pricing & customer terms details
- Product promotion details
- OfflinePOS and related configuration details

Connecting to OfflinePOS

Once connectivity to the main K8 server has been lost, the user at the counter may log onto OfflinePOS using their secure login credentials. They will then be presented with the POS interface, where they can then begin to process the sale. Users may enter products manually, utilize the search options available to find the correct product or, scan a barcode. Pricing is applied using the terms derived for the customer, as they would be within K8 itself. Once the transaction has been entered, the user may complete the transaction.

If a cash sale has been processed, an invoice and receipt will be generated for the customer as per the K8 configuration options chosen.

If a collect sale is entered for a trade customer, then a collection advice note and/or invoice will be generated as per the chosen K8 configuration options.

Once connectivity to the K8 server is resumed

Once connectivity has been restored, the user will log off the OfflinePOS server and log back onto K8. All transactions that have been recorded within OfflinePOS whilst it was in use will be automatically transferred to the K8 server. This will also update the live stock position based on the transactions recorded, and all sales transactions will be placed against the relevant cash or customer account. Collect transactions will then be invoiced using the standard K8 processes.

OfflinePOS features at a glance

Offline point-of-sale solution offers many features to process cash and collect sales when you are offline. These include:

- Touch screen interface
- Process cash & collect sales at the counter
- Generate credit notes and refunds
- Access customer and product-related data
- Utilise customer terms and promotional prices
- View accessories and alternatives
- Capture customer signature for each sale
- Record payments received against sales for reconciliation
- Print customer documentation, including receipts and collection notes
- Your data is automatically synchronized with K8 when online, so there is no re-keying of transactions

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