



A Point-of-Sale CHECKLIST

145 questions to ask the vendor
when researching **POS systems**



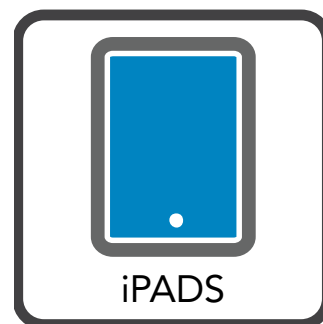
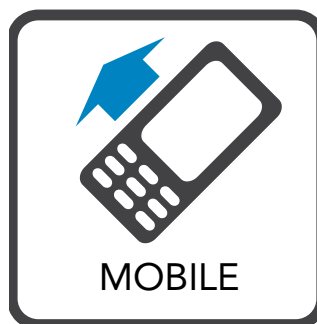
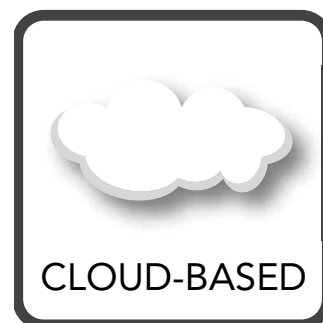
800.564.4488 | www.jdapos.com | POSinfo@jdapos.com

J.D. ASSOCIATES ALL-IN-ONE POS SOLUTIONS

... helps you manage and measure
your stores' performance.

- ✓ Manage inventory completely
- ✓ Identify selling opportunities
- ✓ Analyze results of your efforts
- ✓ Extend your POS solution with lots of apps
- ✓ The RIGHT RETAIL TECHNOLOGY

[Request a POS Consultation](#)



Share this checklist!



Contents



User Interface and System Control	4
Inventory	4
Inventory - (cont'd)	5
Purchase Orders and Receiving	5
Purchase Orders and Receiving - (cont'd)	6
Point of Sale.	6
Point of Sale - (cont'd).	7
Customer Management	7
Reports.	7
Multi-Store Function	8
E-Commerce	8
E-Commerce - (cont'd).	9
International.	9
Miscellaneous	10
Mobile POS	10
Mobile Inventory	11
App Market	11
Notes:	12

POINT-OF-SALE CHECKLIST


Researching point of sale systems means asking the right questions.

J.D. Associates has compiled a list of 145 critical questions you should ask POS vendors. This approach will help you understand the capabilities of the POS systems and the companies behind the software. Finally, compare the answers of all three vendors and make your decision based on your organized research.


Then call or email us with more questions:


800-564-4488 x 242

debra.neville@jdapos.com


		System 2		System 3	
User Interface and System Control	Yes	Yes	No	Yes	No
1. Keyboard, mouse or touchscreen in all parts of the program?	✓				
2. User-designable screens?	✓				
3. User-defined fields, headings, etc?	✓				
4. Define your own "Shortcut Key" options?	✓				
5. "Practice" mode for training purposes, but without effecting real data?	✓				
6. Replace the default language of English with other languages? There are 18 available.	✓				
Inventory					
1. Can you record a dedicated season code?	✓				
2. How many user-defined fields are available?	6 fields				
3. How long are they?	20 characters				
4. How many description fields are available?	4 fields				
5. How long are they?	30 characters				
6. How many other fields (auxiliary fields) are available?	8 fields				
7. How long are they?	20 characters				
8. Is there a dedicated Alternate Look-Up (ALU) field?	Yes				
9. How long is it?	20 characters				
10. In addition to an ALU field, how many other ways are available to look up merchandise (description, attribute, size, vendor, SKU#, etc.)?	7				
11. "Quick Lookup" features including style, description, SKU#, UPC# and ALU#?	✓				
12. How many items can be listed in inventory?	Unlimited				
13. In a "style grid," can you easily change the key values to reflect different data such as quantity, margin %, mark up %, unit price, unit cost, etc.?	✓				

		System 2		System 3	
Inventory - (cont'd)	Yes	Yes	No	Yes	No
14. Is there a different cost and price for smaller sizes or larger sizes that are part of the grid?	✓				
15. Use the Copy and Paste feature to easily add inventory items?	✓				
16. Add images to a style or item for item-verification purposes?	✓				
17. Handle layaways, special orders, sales orders, mail orders, and gift registries?	✓				
18. Track "committed inventory" for layaways, sales orders and transfer orders?	✓				
19. Track back-orders?	✓				
20. Track returns to vendors?	✓				
21. How many price levels are there for each item in inventory?	✓				
22. "User-designable" price tags?	✓				
23. Print price tags directly from any area of inventory?	✓				
24. Delete an obsolete item easily (with the right controls) and still have access to the sales history related to that item for reports, including customer's purchasing history?	✓				
25. High-security transfer module with automatic exception reporting?	✓				
26. Display inventory for multiple store locations on the screen?	✓				
27. Ability to mark merchandise down with an automated tool?	✓				
28. Planned pricing for scheduled sales and markdowns? Mark up the price on a predefined date automatically?	✓				
29. Season code to track the age of your inventory?	✓				
30. Comprehensive audit trail (stock ledger) to track changes made to inventory quantities, price or cost?	✓				
31. Electronic Catalog Tool to easily import items from an electronic catalog?	✓				
Purchase Orders and Receiving					
1. "User-designable" PO and receiving screens?	✓				
2. Display an image for each item in inventory to help ensure that the correct items are being ordered?	✓				
3. Use your own unique PO numbers (or PO titles)?	✓				
4. Add a new vendor easily, without having to leave the PO?	✓				
5. When making a PO, is the system able to instantly transfer the vendor information, such as account #, to the PO from vendor records?	✓				


		System 2		System 3	
Purchase Orders and Receiving - (cont'd)	Yes	Yes	No	Yes	No
6. Properly manage partial shipment against a PO?	✓				
7. When receiving merchandise, does the software automatically update the PO due status?	✓				
8. Print price tags directly from the PO and/or Receiving Modules?	✓				
9. MIN/MAX stock levels for core merchandise, which can be used to automatically create a proposed PO?	✓				
10. MIN/MAX stock levels be automatically proposed for you based on sales history at each store?	✓				
11. Use a drop-ship PO in addition to a centrally distributed PO?	✓				
12. Write a multiple store, drop-ship PO on one document?	✓				
13. Centrally maintain and archive POs?	✓				
14. Purchase by the case and sell by the unit?	✓				
15. Run reports to see what is on back-order and/or what has been filled?	✓				
16. Automatically create a PO from a Sales Order that is linked to that Sales Order?	✓				
Point of Sale					
1. Handle multiple sale associates on the same receipt?	✓				
2. Separate cashiers and sales associates on the same receipt?	✓				
3. Do they offer "mix 'n match" quantity discounts? For example, any 3 T-shirts for \$25.00?	✓				
4. Easily add items to inventory at point of sale?	✓				
5. Put a sales transaction on hold? If so, how many at one time?	✓				
6. Multiple tenders on one sale, including several credit cards?	✓				
7. Integrated credit-card and check-guarantee processing available?	✓				
8. Multiple tax levels and price levels at point of sale?	✓				
9. Ship a purchase to another address, while also supporting any state or local sales tax requirements?	✓				
10. Predefine employee shifts and the employee use of the cash drawer?	✓				
11. Generate a security receipt for situations such as opening the cash drawer without a receipt, turning on and off the computer while making a receipt or exiting the point of sale screen?	✓				

		System 2		System 3	
Point of Sale - (cont'd)	Yes	Yes	No	Yes	No
12. Use foreign currencies and apply exchange rates when handling multiple types of currencies?	✓				
13. Display an image for each item being sold, ensuring that the scanner tag matches the item?	✓				
14. Easily look-up and find items that do not have price tags?	✓				
Customer Management					
1. Construct detailed customer history for sales records, in addition to designing memo fields for further information? Can this information be viewed instantly at point of sale?	✓				
2. Run a customer report based on sales history or sales volume for any time period for a particular customer?	✓				
3. Look at former receipts from the customer screen?	✓				
4. Customer ID cards be scanned at point of sale to automatically locate a customer's record, enter their name and address in the sales receipt header, display their store credit, and display whether they are allowed to purchase by check?	✓				
5. Can their customer ID cards automatically invoke defined discounts, which can be based on a predetermined sales volume a customer purchased during any specific time frame?	✓				
6. Create multiple Customer Loyalty programs to reward and retain your best customers?	✓				
7. Link to Constant Contact to market your customers based on filtered criteria such as items purchased by vendor, department or even total \$ spent – over any time period?	✓				
Reports					
1. Reports be user-designed for any time period and specified data?	✓				
2. User-designed and predefined reports?	✓				
3. Report designed by the user, given a name, saved for future use and then run at any time in the future?	✓				
4. Import and export information to and from other systems including accounting systems, mainframe back office systems and report writers?	✓				
5. Cashier Performance reports and Sales Associate Performance reports?	✓				
6. Capable of being accessed by specialized report writers, such as Crystal Reports?	✓				

		System 2		System 3	
Multi-Store Function	Yes	Yes	No	Yes	No
1. Poll just changes, additions and deletions made to inventory quantities and customer records, instead of polling the entire inventory and customer database every time?	✓				
2. Safeguards in place to prevent data from one or more stores being polled twice, resulting in duplicate data?	✓				
3. Several stores be polled simultaneously?	✓				
4. Multi-store view available in grid format?	✓				
5. Different stores to have different price levels?	✓				
6. Can an employee in one store quickly look up the on-hand inventory in another store?	✓				
7. Is customer information easily accessible by all stores?	✓				
8. If a customer has available store credit, can it be tracked and used in all stores?	✓				
9. Can any store propose a PO to the Main office?	✓				
10. Handle multiple tax criteria for each store location and for each item including state, local, VAT, luxury and tax exempt?	✓				
11. Track inventory in transit?	✓				
12. Track freight charges on transfer slips?	✓				
13. Set their MIN/MAX stock levels either by store or for all stores combined?	✓				
14. "Optimize" distribution from a central warehouse based on the MIN/MAX stock levels that were predefined for the remote stores?	✓				
15. Company-wide gift registry features?	✓				
16. "Corporate Module" that allows consolidation of information from different regions, countries or fiscally separate companies?	✓				
17. Can you create Purchase Orders that accommodate central receiving and subsequent distribution to stores?	✓				
18. Can you create Purchase Orders that accommodate drop shipments directly to stores?	✓				
19. Can receivers which are linked to Purchase Orders be sent directly to accounting packages such as QuickBooks, MAS 90 or Dynamics GP to create payables?	✓				
20. Can the Accounting link accommodate multi-stores even if owned by different companies?	✓				
E-Commerce					
1. Do they offer an E-Commerce solution?	✓				
2. Does their E-Commerce solution provide total integration between the brick-and-mortar location and the website in a single data base?	✓				

		System 2		System 3	
E-Commerce - (cont'd)	Yes	Yes	No	Yes	No
3. Are brick-and-mortar customers shared with the web store and are web store customers shared with the brick-and-mortar location?	✓				
4. Is e-mail notification sent to customers, confirming their orders?	✓				
5. Do they allow you to define your own shipping rates based on weight, price or shipping method?	✓				
6. Do they offer an easy-to-use tool that allows you to attach an image and a long and short description to the inventory item that you wish to post to your web store?	✓				
7. Do they give you a tool that will allow you to easily design your web store from scratch or provide data transfer to and from for an existing web store?	✓				
8. Is inventory decreased in value upon order fulfillment?	✓				
9. Can their solution be set up to automatically poll sales orders from the website to the fulfillment center?	✓				
10. Can current product availability information be displayed on the website automatically?	✓				
11. Can they define a web store price that is different than the price in any of the physical stores?	✓				
12. Can they easily include hyperlinks in your product descriptions for additional information, such as "Meet the Artist" or Read about the history of this hand-crafted item"?	✓				
13. Can quantity discounts be automatically calculated in the web store shopping cart?	✓				
14. Can taxes be calculated automatically in the web store shopping cart?	✓				
15. Can they update information on the web store, such as the home page greeting or the policy information, frequently and easily without involving a professional programmer?	✓				
16. Can they add, remove and rearrange the products in the web store frequently and easily without involving a professional programmer?	✓				
17. Can they fulfill web orders off-line (without being connected to the Internet)?	✓				
18. Can they customize the message in order confirmation e-mails?	✓				
19. Can they provide you with a uniquely designed web store with seamless integration to your brick-and-mortar store?	✓				
International					
1. Support VAT (Value-Added Tax) and the Euro?	✓				
2. Support foreign languages?	✓				
3. Support foreign currencies?	✓				
4. Tender a sale in more than one foreign currency?	✓				

		System 2		System 3	
Miscellaneous	Yes	Yes	No	Yes	No
1. How many years have they been in business and how many users do they have?	25+ YEARS 52,000+ STORES				
2. Can they give you at least three good references?	✓				
3. Can they show you their last three software upgrades with documentation.	✓				
4. How do they charge for support?	✓				
5. Do they provide an adequate number of trained support staff locally?	✓				
6. Will their software run on a variety of IBM and HP-compatible hardware?	✓				
7. Will their program work with a variety of point of sale equipment like cash drawers, printers, & scanners?	✓				
8. Is their software and company focused on point of sale, merchandise management and customer relationship management for the specialty retail industry?	✓				
9. Are they the original program designers?	✓				
10. Is their software and company focused on point of sale, merchandise management and customer relationship management for the specialty retail industry?	✓				
11. Do they have an end-user portal that includes: <ul style="list-style-type: none"> • Customer chat room? • Published technical white papers? • Complete documentation with hundreds of detailed documents? • Training University where you can take classes led by instructors: <ul style="list-style-type: none"> › On-line University (self-paced)? › Hundreds of self-paced training videos? 	✓				
12. Is the software upgraded regularly to reflect changes in retail?	✓				
Mobile POS					
1. Can you use an iOS mobile device to make sale?	✓				
2. Can you process a credit card on the mobile device?	✓				
3. Can you look up a customer on the mobile device?	✓				
4. Can you add or change customer information on the mobile device?	✓				
5. Can you check quantity on-hand at other stores on the mobile device?	✓				
6. Can you see a picture of the item on the mobile device?	✓				
7. Can you park a sale and later retrieve it on the mobile device?	✓				
8. Can you send a sale to a fixed register to be completed later from the mobile device?	✓				
9. Can you print or email a receipt from the mobile device?	✓				

		System 2		System 3	
Mobile Inventory	Yes	Yes	No	Yes	No
1. Can you perform a physical inventory using a mobile device?	✓				
2. Can you perform cycle counts of only specific portions of your inventory using a mobile device?	✓				
3. When quantities are updated after a PI - does the system create an auditable adjustment transaction that corrects inventory quantities?	✓				
4. Can you receive inventory using a mobile device?	✓				
5. Can you transfer inventory using a mobile device:	✓				
6. Can you print labels using a mobile device?	✓				
App Market					
1. Are there 3rd-party Apps that integrate to core product?	✓				
2. If so, are the Apps regulated and certified?	✓				
3. Is it possible to solve any specific business challenge by using 3rd-party developers to write custom plug-ins?	✓				

The folks at J.D. Associates want to talk with you about your business **priorities**, the **outcomes** you value most and the **results** you want to deliver. We call it a “Discovery Meeting.” It’s where we learn about your company *and together*, identify the right retail technology to run your business.

Next, if desired: **POS Consult.** J.D. Associates has created a process (Discovery Meeting, written Recap of the meeting to ensure we understand your needs/goals and if requested, a Product Demo) to help you select the best point of sale system for your retail business. It works.

Call 800-564-44-88 x 242 to schedule your consult today.

Or email debra.neville@jdapos.com



[illegible]