IQ

NOTIFICATIONS

A Kerridge Commercial Systems Company

iQ Retail Pty (Ltd) Registered Office: First Floor, 25 Quantum Road, Technopark, Stellenbosch 7600, Company Reg No. 2000/020305/07. VAT Number: 4760205510

P R E F A C E

This is the IQ Notifications reference guide for IQ Business & IQ Enterprise software systems.

The document will aid in understanding and configuration of the IQ Notifications for it to function correctly.

Although every effort has been made to keep this IQ Notifications document up to date, some of the screen examples may not be 100% the same as the ones reflected in previous versions of IQ Enterprise & IQ Business. This is due to the continuous development and improvement of IQ Enterprise & IQ Business.

Unfortunately, there will be a discrepancy from time to time. We do apologize for the inconvenience that it may cause.

Should you feel that the IQ Notifications document is inadequate or requires further explanation or more and better examples, please feel free to email us.

We would love to have some feedback to improve the IQ Notifications document in some way or another.

Regards,

IQ Retail (PTY) LTD

CONTENTS

INTRODUCTION

IQ Notifications have been added to the Debtors and Stock modules, to allow the user to attach messages or notes to specific debtors and / or stock items. Notifications are pre-defined alerts or reminders that are linked to selected debtors and / or stock items, to provide specific information about the debtor or stock item, for example discount or guarantees or order numbers needed, etc. As soon as the debtor's account or the specific stock item is selected in one of the processing modules, the notification will appear.
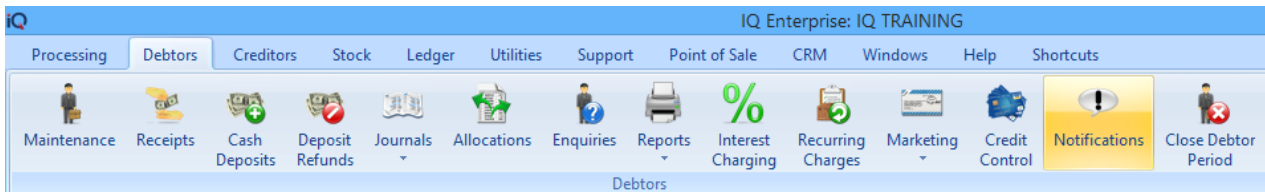
DEBTORS NOTIFICATIONS

Debtors Notifications are used to alert or remind the user about special instructions or information about the specific debtor. Debtors Notifications are Debtor specific, in other words a debtor can only be linked to one notification. One Debtors Notification can however be linked to various selected Debtors.

NOTIFICATION SETUP

Debtors Notifications must be created or defined in the Notifications module before they can be linked to any debtors.

From The IQ main menu → Debtors → Notifications.

The Debtors Notifications screen will appear, which is used to add, edit or maintain the available Debtors Notification.

SORT ORDER

The Sort Order option allows the user to change the sequence in which the entries on the Debtors Notifications screen.

AVAILABLE FILTERS

All filters created and saved for specific information from the Debtors Notifications, are listed under the available filters. Double click on the filter to activate it and double click on "Clear Filter" to show all the information again.

DEBTORS

All the debtors are listed in the grid, with their account numbers, names, balances and linked notifications.

DETAILS

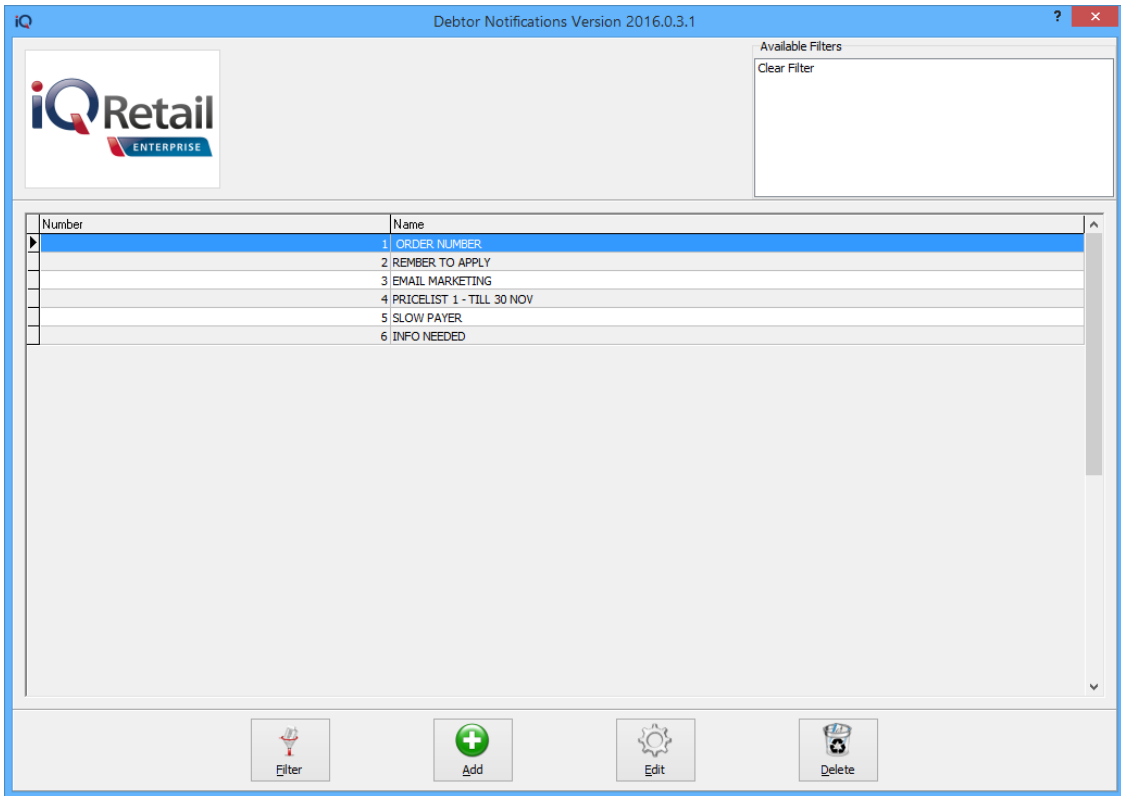| NOTIFICATION	This field enables the user to provide short descriptive name for the notification. The Notification Name is limited to 16 alpha-numeric characters.
NOTIFICATION TEXT	The Notification text allows the user to provide more information about the alert or reminder. The user can for example inform the cashier on what to do when the selected customer wants to buy stock on credit.
ACTIVE IN THE FOLLOWING MODULES	The user needs to tick the applicable boxes next to the modules, to activate the Debtors Notification. As soon as the debtor's account in entered, the notification will appear.
DELETE	The Delete button allows the user to remove or delete a notification from selected debtor's account. **NOTE**: The Notification will automatically be deleted from the Debtors Maintenance for the selected debtor.

BUTTON FUNCTIONALITY

FILTER	The filter option enables the user to filter out specific Debtors Notifications, based on the information shown on the debtors list.
SETUP NOTIFICATIONS	The Setup Notifications enables the user to add, edit or delete Debtors Notifications.
CLOSE	The close option allows the user to close the Debtors Notification screen without saving changes made.

SETUP NOTIFICATIONS

The Setup Notifications screen is where Debtors Notifications can be added, edited or deleted.
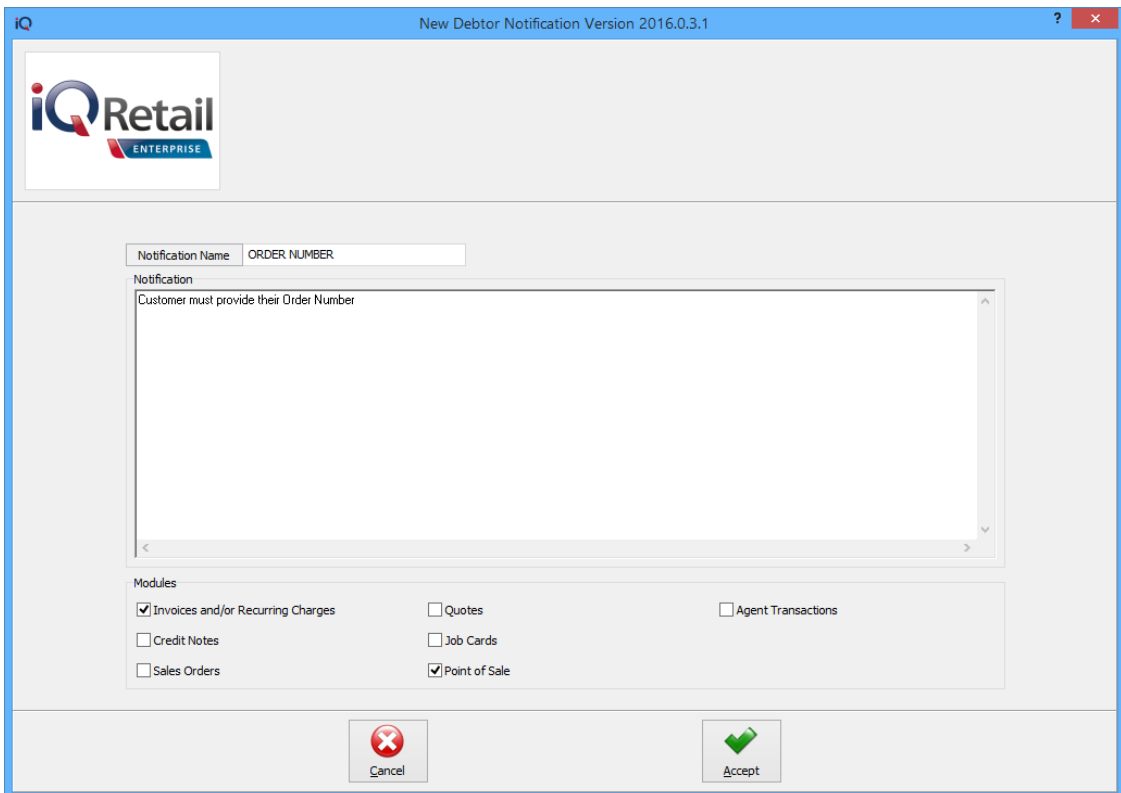

FILTER

The Filter option enables the user to filter out specific information from the notifications.

ADD

The Add option enables the user to add new Debtors Notifications.

Provide the Notification Name. The Notification Name is limited to 16 alpha-numeric characters.

Write in short what the reminder or alert is and what the cashier should do when it appears.

Choose the modules where the notifications will be activated and click on Accept to save the information.

EDIT

The Edit option allows the user to edit or maintain the notification.

NOTE: Remember that Debtors Notifications are debtors specific and when the Notification is changed here, it will change on all the debtors linked to the notification.

DELETE

The Delete option enables a user to delete a selected Debtors Notification.
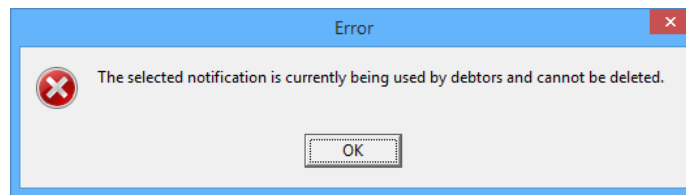
No debtors Notification can be deleted, if it is still linked to a debtor. The user will first have to remove all the links to debtors, before the notification can be deleted.

LINKING DEBTORS NOTIFICATIONS TO DEBTORS

Debtors notifications are debtors specific, thus can they only be linked to selected debtors by activating the option on each debtor individually.

From IQ main menu → Debtors → Maintenance → Select specific debtor → Edit.
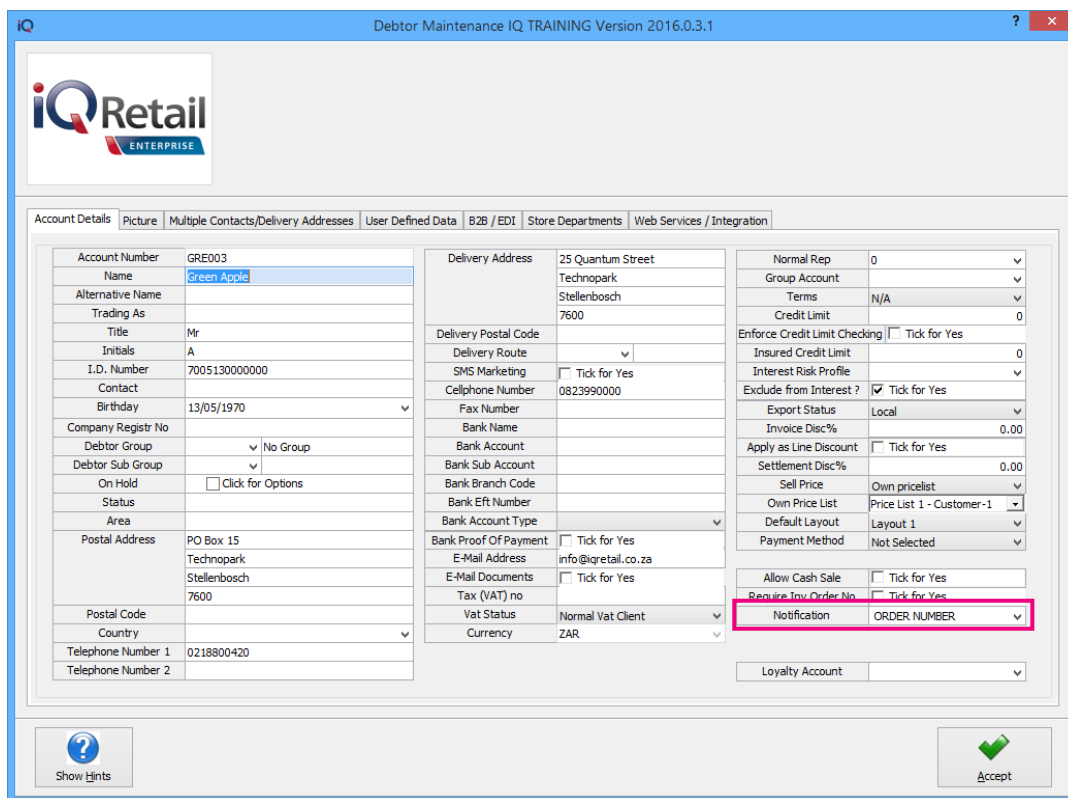
Click on the drop down menu next to the Notification field and select one of the pre-defined Debtors Notifications. Click on the Accept button at the bottom of the screen to save the changes made.

HOW DOES IT WORK?

If a debtor's account is linked to a Debtors Notification, the following screen will appear as soon as the account is selected:
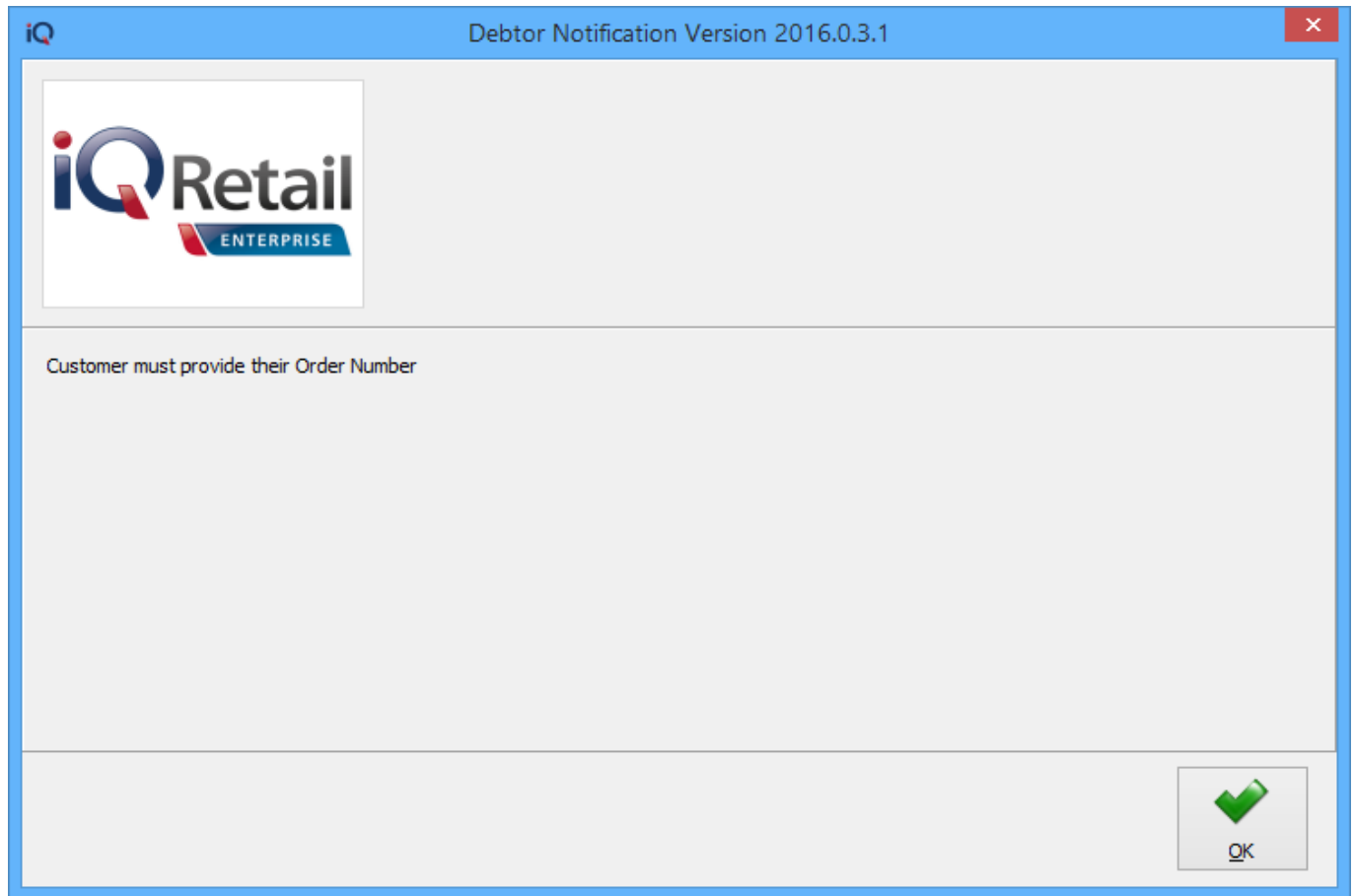
The Notification inform the cashier of what needs to be done.

On the bottom right, the system will count down 5 sceonds before the OK button appears.

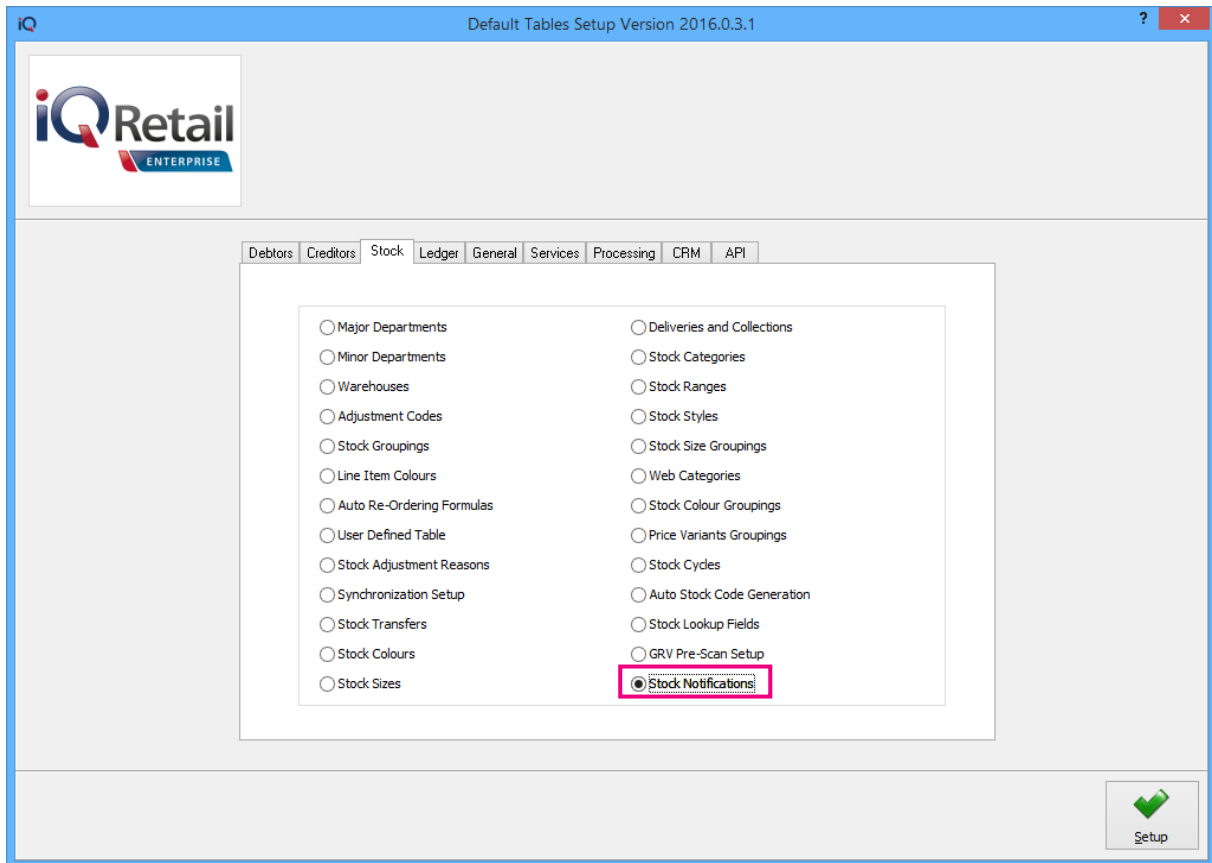Click on the OK button and continue with the sales transaction as normal.

STOCK NOTIFICATIONS

SETUP

MODULE PARAMETERS

Stock Notifications must be created or defined in Module Parameters before they can be linked to specific stock items.

From The IQ main menu → Utilities → Setup → Module Parameters → Stock Tab → Stock Notifications.

Click on the Setup button at the bottom of the screen.

THE STOCK NOTIFICATION SCREEN:

STOCK NOTIFICATIONS

On the left-hand side of the screen, the existing Stock Notifications are listed.

CODE

The code is the number automatically allocated to the Stock Notification.

NAME

Use a short descriptive name for each Stock Notification, to enable the user to easily identify which one to use. The Name is limited to 25 alpha-numeric characters.

NOTIFICATION

The Notification type will be displayed as a Memo type.

DETAILS

NAME

Use a short descriptive name for each Stock Notification, to enable the user to easily identify which one to use. The Name is limited to 25 alpha-numeric characters.

NOTIFICATION

This is where the user will type in the message or note or something to remind or alert sales people when this stock item is being sold.

MODULES

The user must select to which of the listed modules the current Stock Notification must apply.

BUTTON FUNCTIONALITY

CANCEL	The cancel option allows the user to close the Stock Notification screen, without saving the changes made to the selected Stock Notification.
ADD	The add option allows the user to add new Stock Notifications to the list.
EDIT	The Edit option allows the user to edit and maintain the existing Stock Notifications.
DELETE	The Delete option allows the user to delete existing stock notifications if it is not going to be used again.
SAVE & EXIT	The Save & Exit option allows the user to save the changes made and to exit the Stock Notifications screen.

LINK TO STOCK ITEMS

From the IQ main menu → Stock → Maintenance → Edit selected stock item → Additional Details Tab.
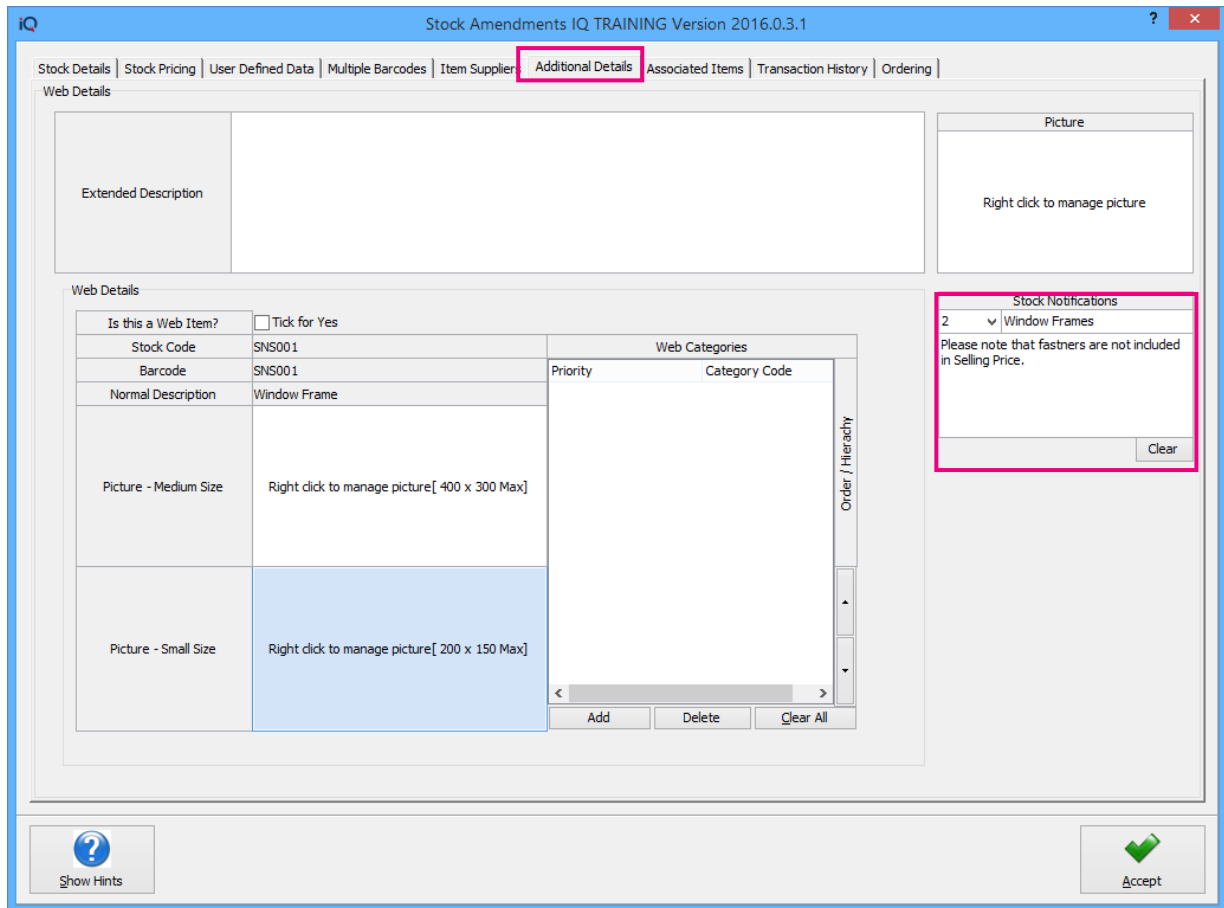
Stock Notifications are stock item specific notes. In other words, for the selected item, there is a note to alert the user that window fasteners are not included in the selling prices. The user can remember to tell the customer about available fasteners which are sold separately.

NOTE: One Stock Notification can be linked to many stock items, but each stock item can only be linked to one stock notification.

To select the appropriate Stock Notification for the selected item, click on the drop-down menu in the Stock Notifications box. Select the wanted Notification and click on the Accept button at the bottom of the screen to save the change.

The Clear button at the bottom of the Stock Notification box will remove the Stock notification from the item. The item will only be updated once the Accept button at the bottom of the screen has been selected.

NOTE: If the user edits and or changes the Stock Notification in Module Parameters, all the linked stock items will also be updated.

HOW DOES IT WORK?
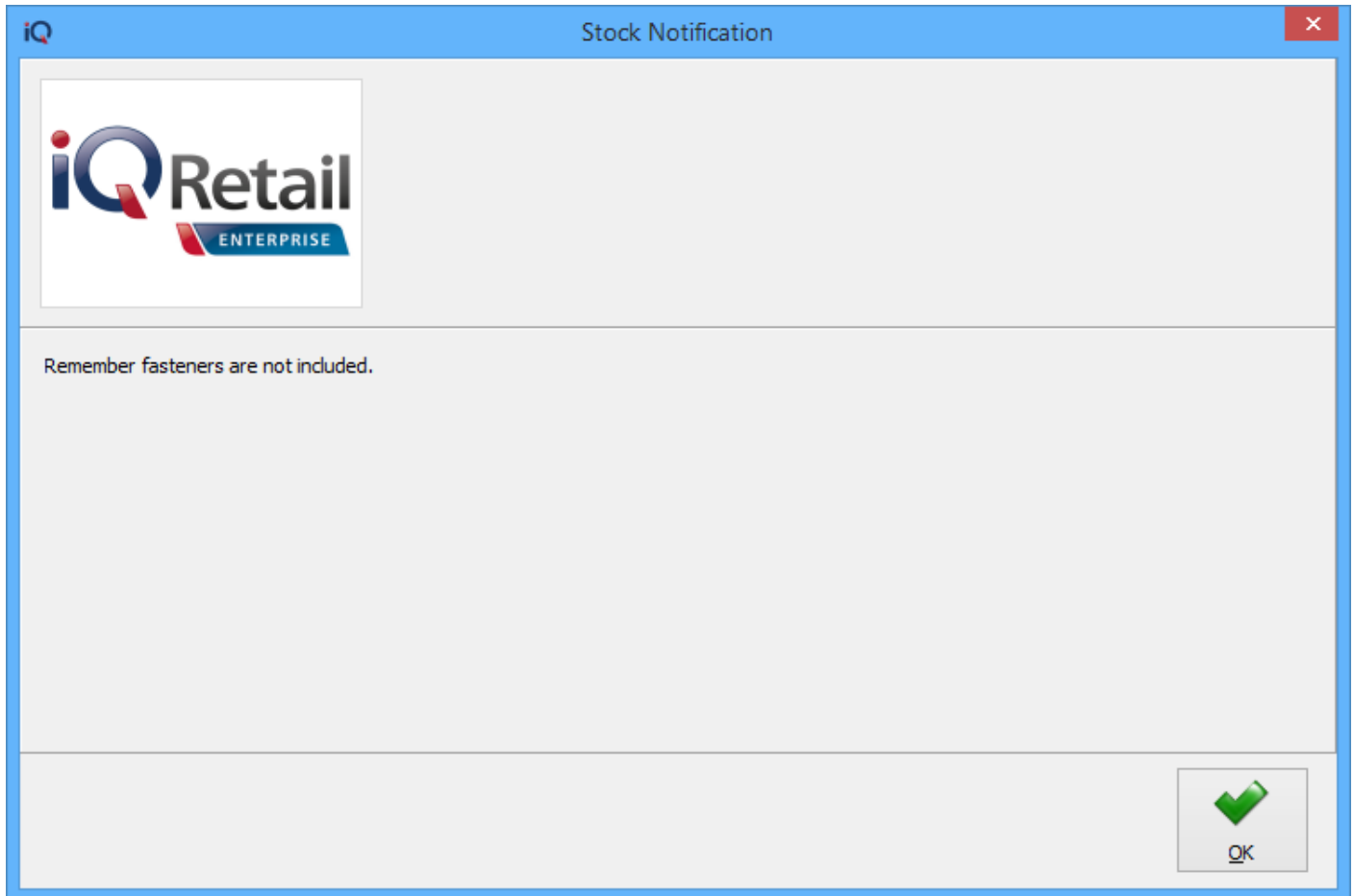
As soon as the item to which the stock notification is linked, is being entered on the till, the Stock Notification linked to the item will appear on the screen. This screen is meant to remind or alert the cashier with information about the item. The user must wait for 5 seconds to count down, before the OK button can be clicked. As soon as the message was read, the user can click on the OK option to continue with the transaction.

--- End of Document ---