

IQ NOTIFICATIONS

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PREFACE

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



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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 \rightarrow Debtors \rightarrow Notifications.

iQ								IQ En	terprise: l	Q TRAINING	3		
Processing	Debtors	Creditors	; Stock	Ledge	r Utilities	Support	t Poin	t of Sale	CRM	Windows	Help	Shortcuts	
<u>.</u>	QE		1	JI II		6		%	6	Hand S.		Ð	10
Maintenance	Receipts	Cash Deposits	Deposit Refunds	Journals *	Allocations	Enquiries	Reports *	Interest Charging	Recurring Charges	g Marketing	Credit Contro	Notifications	Close Debtor Period
	Debtors												

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

		Debtor Notifications \	/ersion 2016.0.3.1			? >
	Sort Order			Ava	ilable Filters	
QRe				Clea	r Filter	
ENT	O Name					
Debtors			1		Details	191
Account	Name	Balance	Notification	^	Select a notification	below:
ABC001	ABC Store (Pty) Ltd	38 697.65	EMAIL MARKETING		Notification	INFO NEEDED V
BLA001	Black - Terms 30 Days	38 425.27		-		Client's correspondence comes
BLU001	Blue - Credit Limit R1	3 592.35				back RTS.
BRO001	Brown - Vat Exempt (Export)	23 880.92	INFO NEEDED		Notification Text	Refer to debtors clerk
CASUUI	cash01	-5 285.00		- 11		
COD001	COD ACCOUNT	0.00		-	Active in	the following modules
CDE001	Foreign Currency - Dollar	3 003.79				-
CRE002	Grey - Settlement Disc (Earmer)	2 409 69				r Reg Ibb Cards
GRE002	Green Apple	8 008 75	PRICEUST 1 - TTU 30 NOV		Invoices and/o	
GRI001	Griet Verdriet	600.00	TRICELIST I THE SURVEY	-		_
GR1002	Apple Apple	0.00			Credit Notes	 Point of Sale
KOO001	Koos Petoors	300.00				
MAL001	MALL MALLYMALL	600.00			Sales Orders	Agent Transactions
NEW001	Griet Verdriet	0.00				
PIE001	Piet Pompies	1 428.00			✓ Quotes	
	Gielie	0.00			C Quotes	
PIE002						
PIE002 POL001	POLLY POTTER	228.00				

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

 Eilter	 Setup Notifications	 <u>C</u> lose	
Ŷ		$\mathbf{\overline{S}}$	

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.

iQ	Debtor	Notifications Version 2016.0.3.1		? ×
			Available Filters	
			Clear Filter	
Number	Name			
	1 OPDER NUMBER			
	2 REMBER TO APPL	Y		
	3 EMAIL MARKETIN	G		
	4 PRICELIST 1 - TIL	L 30 NOV		
-	5 SLOW PAYER			
	6 INFO NEEDED			
				~
	Pilter Add	Edit	Delete	

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.

Q	New Debtor Notification Version 2016.0.3.1	? ×
Notification Name ORDER NUMBER		
Notification		
C	~	
Modules		
✓ Invoices and/or Recurring Charges	Quotes Agent Transactions	
Credit Notes	Dob Cards	
Sales Orders	✓ Point of Sale	
Cancel	Accept	



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 \rightarrow Debtors \rightarrow Maintenance \rightarrow Select specific debtor \rightarrow Edit.

It Details Picture Multiple CC Account Number GRE00 Name Green Alternative Name Trading As Title Mr Initials A I.D. Number 700511 Contact Birthday 13/05/ Company Registr No Debtor Group	ntacts/Delivery Addresses User Defi 3 Apple 30000000	Delivery Postal Code Delivery Postal Code Delivery Route SMS Marketing Celiphone Number	e Departments Web Services / Int 25 Quantum Street Technopark Stellenbosch 7600 V Tick for Yes 082399000	Itegration Normal Rep Group Account Terms Credit Limit Enforce Credit Limit Chec Insured Credit Limit Chec Insured Credit Limit Interest Risk Profile	0 ~ ~ N/A ~ 0 dang Tick for Yes 0
tt Details Picture Multiple Cr Account Number GRE00 Name Sreen Alternative Name Trading As Titite Mr Initials A I.D. Number 700511 Contact Birthday 13/05/ Company Registr No Debtor Group	Intacts/Delivery Addresses User Defi	Delivery Address Delivery Postal Code Delivery Postal Code Delivery Route SMS Marketing Celiphone Number	e Departments Web Services / Int 25 Quantum Street Technopark Stellenbosch 7600 V Tick for Yes 082399000	Normal Rep Group Account Terms Credit Limit Enforce Credit Limit Chec Insured Credit Limit Therest Risk Profile	0 V N/A V dang Tick for Yes
Account Number GREDO Name Green Alternative Name Trading As Trading As Initials A Mr Initials A No I.D. Number 70051 Contact 13/05/ Company Regist No Debtor Group	3 Apple 30000000 1970 V	Delivery Address Delivery Postal Code Delivery Route SMS Marketing Celiphone Number	25 Quantum Street Technopark Stellenbosch 7600 V Tick for Yes 0823990000	Normal Rep Group Account Terms Credit Limit Enforce Credit Limit Chec Insured Credit Limit Interest Risk Profile	0 ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
Name Breen Alternative Name Initials Trading As Mr Initials A I.D. Number 700512 Contact Birthday Birthday 13/05/ Company Registr No Debtor Group	Apple 30000000 1970	Delivery Postal Code Delivery Route SMS Marketing Cellphone Number	Technopark Stellenbosch 7600 Titk for Yes 0823990000	Group Account Terms Credit Limit Enforce Credit Limit Chec Insured Credit Limit Interest Risk Profile	N/A V dking Tick for Yes
Alternative Name Trading As Title Mr Initials A I.D. Number 70051: Contact Birthday 13/05/ Company Registr No Debtor Group	30000000 1970 V	Delivery Postal Code Delivery Route SMS Marketing Cellphone Number	Stellenbosch 7600 Tick for Yes 082399000	Terms Credit Limit Enforce Credit Limit Chec Insured Credit Limit Interest Risk Profile	N/A 0 dking Tick for Yes
Trading As Title Mr I.nitials A I.D. Number 200511 Contact Birthday 13/05/ Company Registr No Debtor Group	30000000 1970 - V	Delivery Postal Code Delivery Route SMS Marketing Cellphone Number	7600	Credit Limit Enforce Credit Limit Chec Insured Credit Limit Interest Risk Profile	king Tick for Yes
Title Mr Initials A I.D. Number 70051 Contact Birthday 13/05/ Company Registr No Debtor Group	30000000 1970	Delivery Postal Code Delivery Route SMS Marketing Cellphone Number		Enforce Credit Limit Chec Insured Credit Limit Interest Risk Profile	king 🔽 Tick for Yes 0 V
Initials A I.D. Number 70051: Contact Birthday 13/05/ Company Registr No Debtor Group	30000000 1970 V	Delivery Route SMS Marketing Cellphone Number	Tick for Yes 0823990000	Insured Credit Limit Interest Risk Profile	0
I.D. Number 70051: Contact Birthday 13/05/ Company Registr No Debtor Group	30000000 1970 V	SMS Marketing Cellphone Number	Tick for Yes	Interest Risk Profile	×
Contact Birthday 13/05/ Company Registr No Debtor Group	1970 🗸	Cellphone Number	0823990000		
Birthday 13/05/ Company Registr No Debtor Group	1970 🗸			Exclude from Interest ?	Tick for Yes
Company Registr No Debtor Group		Fax Number		Export Status	Local
Debtor Group		Bank Name	2	Invoice Disc%	0.00
	✓ No Group	Bank Account		Apply as Line Discount	Tick for Yes
Debtor Sub Group	~	Bank Sub Account		Settlement Disc%	0.00
On Hold	Click for Options	Bank Branch Code		Sell Price	Own pricelist V
Status		Bank Eft Number		Own Price List	Price List 1 - Customer-1 -
Area		Bank Account Type	~	Default Layout	Lavout 1
Postal Address PO Box	: 15	Bank Proof Of Payment	Tick for Yes	Payment Method	Not Selected V
Techno	park	E-Mail Address	info@iqretail.co.za		
Stellen	bosch	E-Mail Documents	Tick for Yes	Allow Cash Sale	Tick for Yes
7600		Tax (VAT) no		Require Inv Order No	Tick for Yes
Postal Code		Vat Status	Normal Vat Client 🗸	Notification	ORDER NUMBER
Country	~	Currency	ZAR 🗸		
Telephone Number 1 021880	00420				
Felephone Number 2				Loyalty Account	v
?					

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:

iQ	Debtor Notification Version 2016.0.3.1	×
Customer must provide their Order Number		
	<u>o</u> k	

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 \rightarrow Utilities \rightarrow Setup \rightarrow Module Parameters \rightarrow Stock Tab \rightarrow Stock Notifications.



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



THE STOCK NOTIFICATION SCREEN:

iQ	Stock N	otifications Version	20	16.0.3.1	? ×
Stock Notifications		Motification		Details	
2 Window Frames		(Memo)	î	Name:	
				Window Frames	
				Notification:	
				Please note that fastners are not included in Selling Price.	
				Clear	Add
				✓ Invoices and/or Recurring Charges Job Cards	
				Credit Notes	
				Sales Orders Agent Transactions	
			~	V Quotes	
Cancel	Add	Edit		Delete Save	e & Exit

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

		ې ټې	8	•
<u>C</u> ancel	Add	Edit	<u>D</u> elete	<u>S</u> ave & Exit

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 \rightarrow Stock \rightarrow Maintenance \rightarrow Edit selected stock item \rightarrow Additional Details Tab.

iQ	Q Stock Amendments IQ TRAINING Version 2016.0.3.1 ? 🗙					
Stock Details Stock Pricing User Defined Data Multiple Barcodes Item Supplier Additional Details Associated Items Transaction History Ordering Web Details						
					Picture	
Extended Description					Right dick to manage picture	
Web Details					Stock Notifications	
Is this a Web Item?	Tick for Yes				2 V Window Frames	
Stock Code	SNS001	Web Categ	ories		Please note that fastners are not included	
Barcode	SN5001	Priority Ca	tegory Code		in Selling Price.	
Normal Description	Window Frame					
Picture - Medium Size	Right click to manage picture[400 x 300 Max]			Order / Hierachy	Clear	
Picture - Small Size	Right click to manage picture[200 x 150 Max]	< Add Delete) Clear All	•		
Show Hints					<u>Accept</u>	

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?

iQ	Stock Notification	×
Remember fasteners are not included.		
		<u>O</u> K

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 ---

