



iVend for **sage** 300cloud

An Integrated Omnichannel Solution

Designed for The Way Retailers Work Today



Stand-out service and looking after loyal customers is key for retail businesses to compete in today in light of lofty customer demands. iVend Retail's technology suite delivers so much more than just a Point of Sale system. Transact, up-sell, and liaise with your customers using technology that seamlessly integrates stores, inventory and back office operations.

iVend Retail is the most complete out of the box omnichannel solution on the market today, covering everything from Point of Sale to back office to head office operations with integrated mobile POS, eCommerce, digital coupons, reporting and analytics and a customer loyalty program.



“

CAPEZIO 

Now when we create a product in Sage 300cloud, there it is at our retail stores in iVend POS. When we change prices and add barcodes in our ERP, there they are in iVend Retail. Finally happy days! We can now run consolidated sales reports which can combine sales of items across our wholesale, retail and eCommerce divisions. This has been a big leap forward and a long time coming.

**- Sam Pavone, Accountant/Operations Manager,
Capezio Australia**

An Enterprise Class Solution



OPTIMISED FOR OMNICHANNEL

A digital store platform for delivering connected shopping experiences across all sales channels



SEAMLESS INTEGRATION TO SAGE 300CLOUD

Future safe integrations utilizing AL programming language and interoperable iVend APIs



HIGHLY SCALABLE

Software that will scale with your business from a single store to hundreds of stores across multiple geographies and currencies



LOW TOTAL COST OF OWNERSHIP

An end-to-end software platform that is easy to use, deploy, and maintain as your business needs expand



Seamless Integration to Sage 300cloud

Easily Achieve Omnichannel Capabilities

With iVend Retail integrated to Sage 300cloud, retailers can readily achieve omnichannel capabilities to deliver the personalised, convenient experiences today's shopper have come to expect. Harmonise day-to-day retail operations from Head Office to Back Office through to all customer touch-points with minimal manual intervention and streamlined retail functionality.

Tangible Business Benefits

- **Boost sales** – achieve sales objectives with a lower stock to sales ratio and to focus inventory where it is most needed with promotions management functionality and customer loyalty programs.
- **Gain visibility** – access a single stream of data and easy to use contextual dashboards to enable more informed decision through automatic alerts, workflows, and response to key business events and customer needs.
- **Strengthen customer loyalty** – track all customer contacts and purchasing preferences; launch targeted promotions, offers, and personalized campaigns that keep customers coming back to buy more.
- **Anticipate customer demand** – analyze complete past transaction data to predict customers will buy, check inventory availability in real time, and balance stock levels to match demand.
- **Optimise inventory management** – manage store's inventory level to match anticipated demand; track all stock items and movements with full visibility into real-time inventory availability.



- **Grow an online presence** – design and manage online stores and seamlessly integrate them with back-end inventory management, order processing, shipment tracking, and payment systems.
- **Streamline operations** – seamlessly integrate key in-store and head office business processes into a single, unified system thereby reducing the need to recapture or manually import data.

Prepare Your Business for Growth

Sage 300cloud software is designed to prepare businesses for growth with enterprise management and accounting applications that go beyond the ordinary. Access cutting-edge management tools for accounting, inventory, operations, distribution, and more. Sage 300cloud helps retailers streamline business operations and is designed to support medium-sized companies with up to several hundred users.

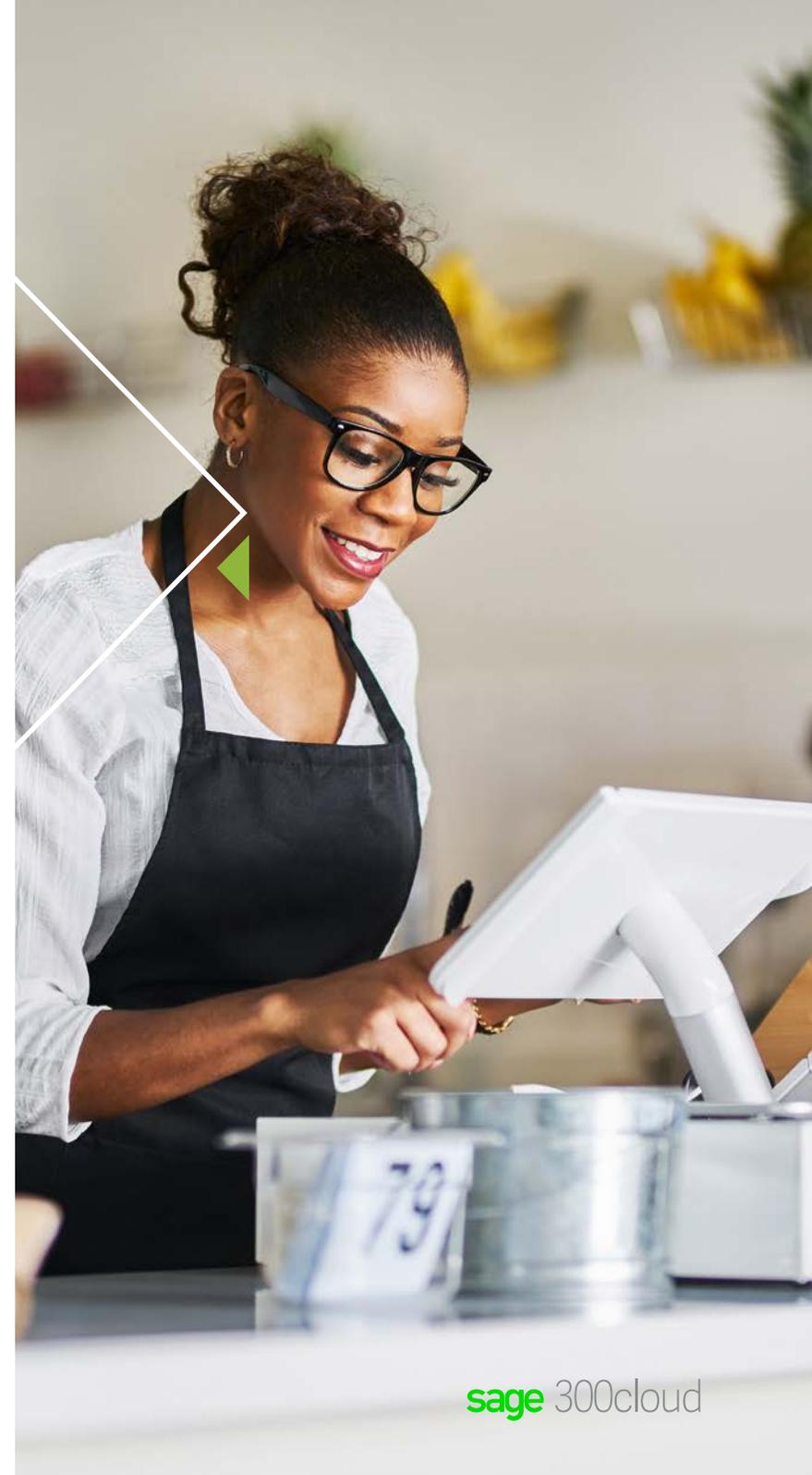
- Designed for growing medium-sized businesses
- 24/7 access to transactional data with true Web screens across financials
- Financial, Operational, Inventory, Sales, Marketing and Customer Service data
- Multi-user, multi-currency and multi-language
- In-built workflow and process tools
- Personalised KPI Dashboard and robust Business Intelligence tools

End-to-End Business Management

Sage 300cloud is used by businesses around the world to automate workflows across their organisations, gain greater visibility into data and the ability to communicate information with ease. Sage 300cloud is cost-effective, quick to implement, and simple to use. With flexibility of choice, organisations can select the best edition, modules, deployment method and payment options to quickly add greater business functionality.

The iVend Retail and Sage 300cloud Integration Advantage

iVend Retail integrates to Sage 300cloud via standard interoperable APIs. The integrated solutions simplifies accounting and extends functionality across entire the retail ecosystem. Sage 300cloud is installed at the Head-office and can be deployed to connect to iVend Retail either On-premise or On-cloud. Retail store operations are connected to iVend Enterprise – the central Head Office component of iVend Retail using Internet or WAN connections. Fail safe replication allows stores to continue transaction even if a connection to the Head Office is unavailable.



iVend for Sage 300cloud Integration

Integrated Masters

Sage 300cloud Master Data Sync

- Customer Groups
- Customer
- Vendor Groups
- Vendor
- Bank
- Items
- Item category
- Item Pricing
- Contract pricing
- Price List Codes
- Manufacture's Item
- Units Of Measure
- Locations
- Serial and Lot numbers
- Salespersons
- Currency Code
- Currency Rates
- Taxation
- Payment Codes
- Miscellaneous Charge
- Additional cost
- Item UOM



POS Transactions

iVend Transaction	Corresponding Sage 300cloud Transaction
Sale	Invoice Entry
Refund	Refund Batch List
Special Order	Order Entry
Special Order Delivery	Shipment Entry
Quotation	Order Entry
Quotation Converted to Sale	Invoice Entry
Quotation Converted to Order	Order Entry
iVend Incoming Payment	Receipt Batch List
Sale return	Credit note Entry

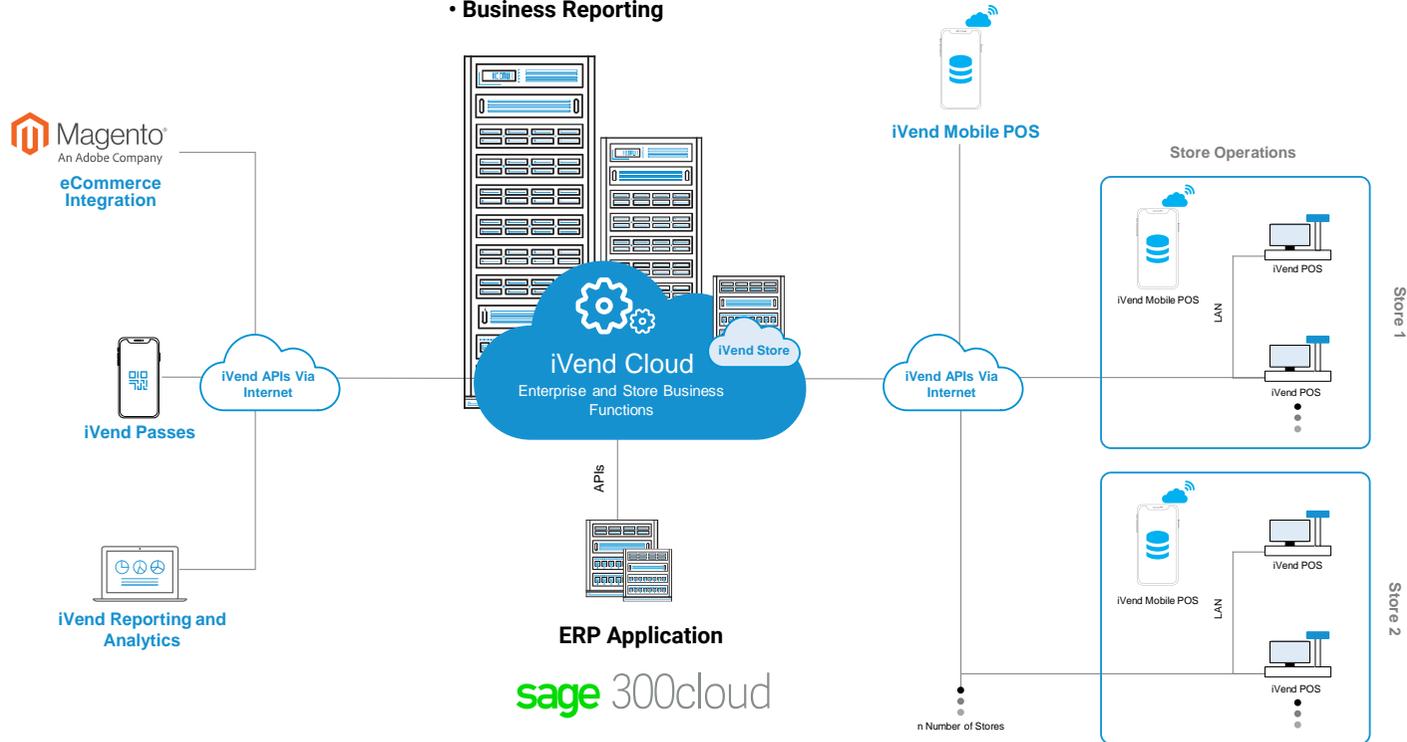
Back Office Transactions

iVend Transaction	Corresponding Sage 300cloud Transaction
Purchase Order	Purchase Order Entry
Goods Receipt PO	Receipt Entry
Goods Receipt	Inventory Adjustments
Goods Return	Return Entry
Goods Issue	Inventory Adjustments
Stock Transfer Shipment	Inventory Transfers
Stock Transfer Receiving	Inventory Transfers
Inventory Counting	Inventory Adjustments
Expense	G/L Journal Entry

Integration Landscape

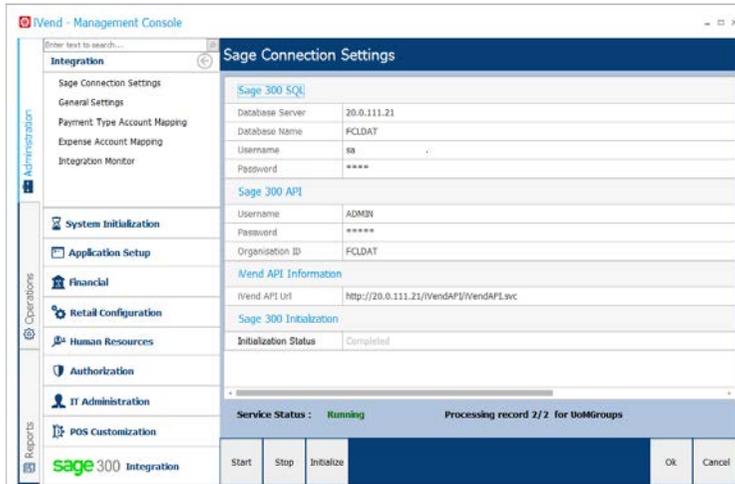
Version: Sage 300cloud 2018, Sage 300cloud c 2019

- Master Data Management
- Transaction Management
- Customer Loyalty Management
- Business Reporting



Integration Setup

Sage 300cloud Integration Configuration



Simple and Intuitive Integration Configuration – Easily configure settings within a single window. Inform iVend Retail of the database and API location of your Sage instance, then initialize the system to start working.

Support for Matrix Items

Item Display in Sage 300cloud

Inventory items are displayed intuitively for enhanced customer service and viewing. iVend Retail allows conversion of one-dimensional items in Sage 300cloud to matrix items in iVend Retail. This is achieved by converting and mapping Optional Fields in Sage 300cloud to Product Attributes in iVend Retail.

Sage 300cloud Integration Monitor

Real-Time Integration Monitor – View a consolidated, real-time overview of transactional and master data integrations between iVend Retail and Sage 300cloud. The integration monitor intuitively presents failed, pending and successfully integrated transactions.

Item Display in iVend Retail

Integration Setup

Payment Type to GL Account Mapping

Payment Type	GL Account	Account Name	Account Type
Cash	1000	Canadian Commercial Bank	Asset
Check	1000	Canadian Commercial Bank	Asset
Debit Card	1000	Canadian Commercial Bank	Asset
Gift Card	1000	Canadian Commercial Bank	Asset
Master Card	1000	Canadian Commercial Bank	Asset
Visa Card	1000	Canadian Commercial Bank	Asset
Wire Transfer	1000	Canadian Commercial Bank	Asset
Other	1000	Canadian Commercial Bank	Asset

Quick Access to Account Mappings – Administrators can quickly access Payment Types within iVend Retail for Sage 300cloud to manage account mapping between Payment Type and Variances to Sage 300cloud General Ledger accounts and banks. Ensure correct financial entries are posted without any manual intervention or dual entry.

Promotions (Bonus Buys)

Intuitive Display of Promotions in iVend POS

The screenshot shows a POS interface for 'THE APPAREL STORE'. A sale is in progress with the following items:

Type	Product Code	Description	Discount	Quantity	Price	Total
SALE	A14480	White Melamine Board	0.00 %	1	\$14.75	\$14.75
SALE	A14390	Black Board	25.00 %	1	\$17.70	\$13.28
PROMOT	BUY	Buy X Get Y at a d...		1		(\$1.77)

The interface also shows a sidebar with navigation options (Cash, Payments, Credit Card, Receipts, QR Account) and a customer information form.

iVend Retail offers one of the most powerful promotions modules available. All promotions in iVend Retail are posted to Sage 300cloud like any other discount, even though the net effect of promotion is a discount that gets applied on the sale (either individual items or at the document level).

Customer Credit Limit and Balance Update

iVend for Sage 300cloud manages customer credit limits and balances from anywhere the customer is making a transaction. The customer can pay in either iVend POS or in Sage 300cloud. In each case, the integration synchronises the customer credit limit and balance.

Gift Card Integration

Simple Gift Card Setup - An essential feature of any retail application, iVend Retail for Sage 300cloud supports multiple types of Gift Cards including pre-printed, user defined, and email based. Gift cards are easy to configure in iVend Retail and are seamlessly integrated with Sage 300cloud to work as payment type.

Support for iVend Loyalty

Reward Customer Loyalty - Easily create a loyalty and referral program with in-built Loyalty Management in iVend Retail, all seamlessly integrated to Sage 300cloud as a payment type. Management of customer loyalty including program levels, points accumulation policies, redemption plans are all managed in iVend Retail and designed to be as simple as possible for you and your customers. The net effect of loyalty points redemption is integrated into Sage 300cloud is as a payment type.

iVend Enterprise

Putting Data at The Heart of Your Business Decisions

Data drives success in omnichannel retailing; and the iVend Enterprise module is the central application controlling retailers' master data.

This module defines key statistics—including sales forecasting, replenishment planning, promotions, gift cards, loyalty schemes and more—and replicates information across the entire retail estate.

iVend Enterprise also collates transactions, such as sales, refunds, returns and store credits, to provide essential insights—particularly in two key areas:

Single Stock Pool

- One view of stock availability and location for reduced inventory costs and increased customer satisfaction
- Replenishment recommendations based on core metrics
- Statistical forecasting based on industry practices
- Sophisticated price management and promotions engine

Connected Customer Experiences

- Enterprise-wide loyalty programs that enables customer segmentation
- Supports digital loyalty scheme passes across all channels
- Assisted selling services available across all channels
- Cross-channel visibility of all customer incentives



iVend Point of Sale (POS)

Fast, Dependable Point of Sale

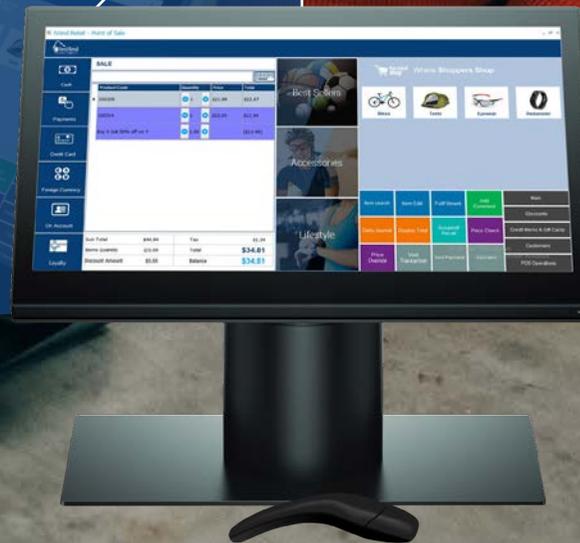
Time is a shopper's most valuable currency, and iVend POS delivers a fast, dependable Point of Sale application for quick and convenient customer transactions. Trusted by retailers in 90+ countries, iVend POS offers the choice of a touch-screen interface or easy-to-use keyboard, with minimal associate training required.

Execute quick transactions with custom branded, user-friendly terminal interfaces that work ONLINE and OFFLINE making your business never stop producing. Collect and manage customer details for more personalized service, fulfill click-and-collect transactions, improve promotion management with automated discounts, gift cards, integrated loyalty, eCommerce and more.

iVend POS enables retailers to maximize sales, gross margin and profits by achieving every possible sale using inventory anywhere in the retailer's network, even when it is a long way from the customer, maximizing customer satisfaction at the same time. The solution supports every possible customer path through the retailer's "system" with totally consistent approaches to promotions, customer returns and exchanges, earning and redemption of loyalty rewards, use of gift cards and electronic coupons.

Features:

- Flexible configuration that's easy to implement globally
- Complete inventory visibility at the POS
- Payment processing with country-specific, integrated payment systems
- Customizable promotions execution and gift card functionality
- Online or offline functionality; not dependent on an internet connection



iVend Mobile (mPOS)

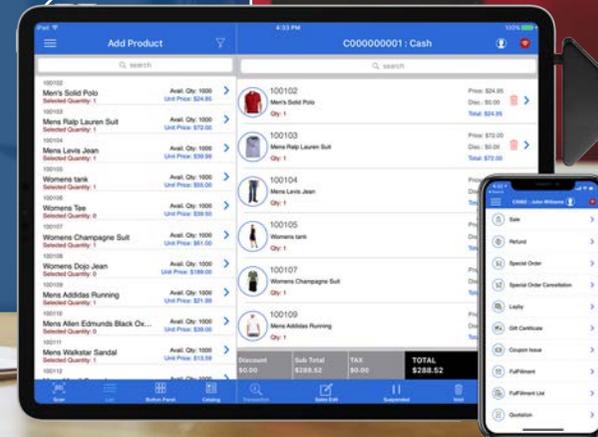
Taking Service Directly to the Customer

Delivering on customer experience today means stepping out from behind a fixed checkout and serving your shoppers wherever they are. iVend mPOS facilitates flexible customer interactions with a fully functional Mobile POS running on iOS or Android platforms that enriches consumer interactions by giving store associates immediate access to all core Point of Sale and customer service functionality.

Empower store associates via any iOS or Android mobile device with access to all POS functions, so you can interact and transact with shoppers on the floor and process sales from anywhere in the store, or remotely. iVend mPOS can connect to a store server or to the enterprise server via the internet and can be configured for use outside the confines of the physical store and is ideal for pop-up stores or events such as markets, fairs and exhibitions.

Features:

- iVend mPOS helps retailers reduce IT infrastructure costs for faster business expansion
- Works both in online and offline mode
- Shorten lines at the till during peak times, to help reduce abandoned purchases
- Access product and inventory information, product information and customer data
- Take service to your customer, not vice versa



iVend Digital Commerce

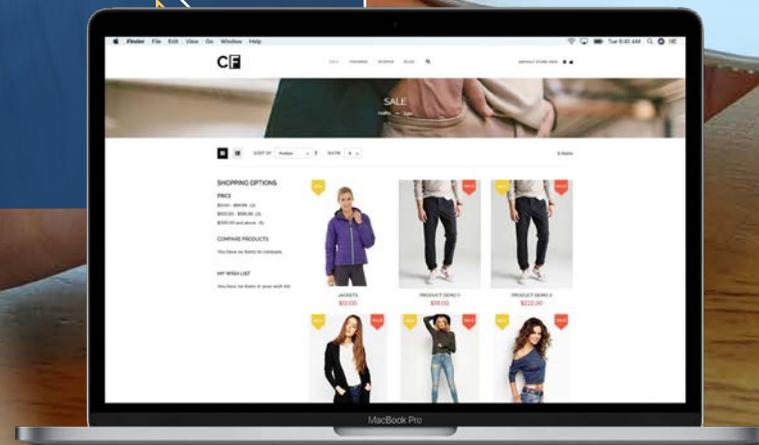
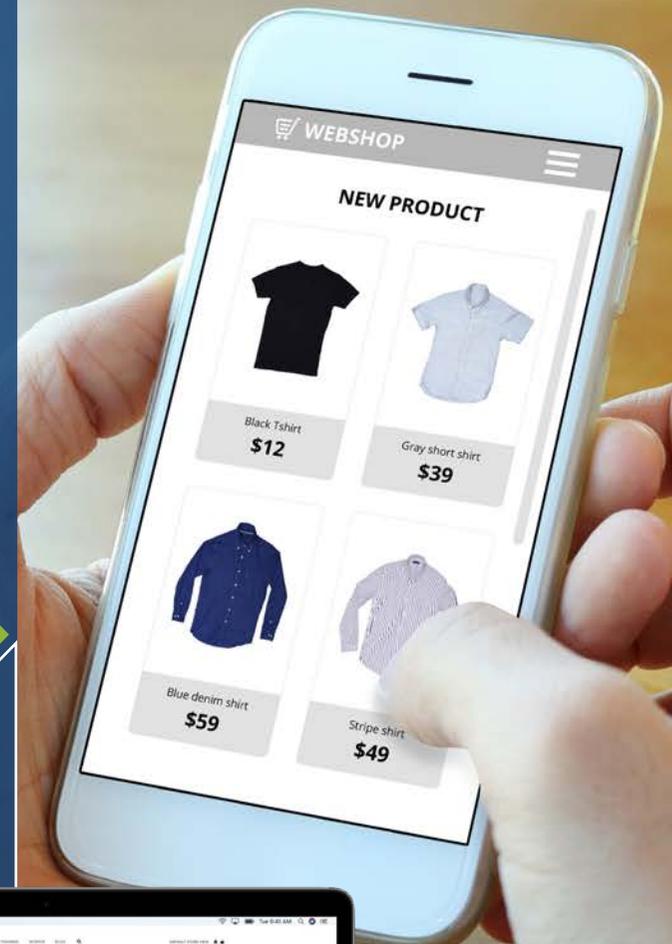
Integrate Physical and Digital Channels to Give Customers a Unified Shopping Experience

The growth of online shopping seems unstoppable – especially now that mobile commerce is generating fresh revenue opportunities; make sure you're positioned to capture these sales.

Selling online, selling on mobile and integrating to sell more in stores has never been so simple. iVend Digital Commerce enables retailers to seamlessly operate across digital and physical sales channels through iVend Retail and Magento Commerce software. Robust platform integration ensures consistent experiences with your brand wherever customers prefer to shop.

Features:

- Fast track your omnichannel business model in just weeks
- A true single stock pool for optimal inventory management
- Visibility into product availability from anywhere across the enterprise
- Click and Collect, Buy Online Pickup in Store, and Reserve and Collect
- Easily offer Home Delivery, Store Pickup and Curbside Delivery
- Seamless use of loyalty points, gift cards and coupons across channels



iVend Loyalty

Keep Customers Coming Back

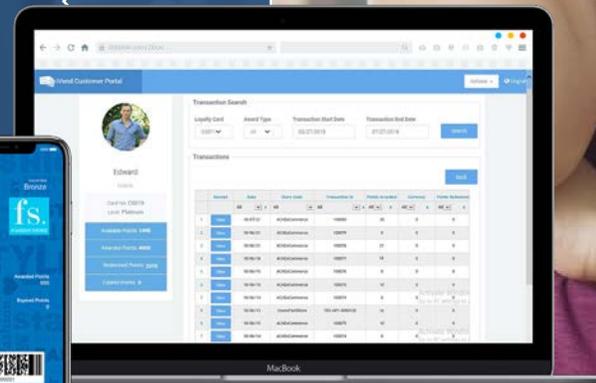
True loyalty is based on shoppers' lifetime value to your business — not the cost of a single transaction. iVend Loyalty allows retailers to reward customers for the way they shop in all channels, in a way that builds long-term advocacy.

Develop a loyalty program to reward customer purchases and generate loyalty for your brand. iVend Loyalty is a flexible points and rewards platform available through physical or digital cards. iVend Loyalty provides the tools for retailers to develop deeper relationships with customers by leveraging purchase history and shopper preferences. iVend Loyalty allows retailers to structure programs to fit the business model, creating multiple incentives across all sales channels.

Features:

- Develop flexible loyalty programs, configured around customer and product groups
- Increase targeting and timeliness of customer communications
- Incorporate service elements into loyalty schemes, not just points collection
- Create tiered levels of membership and automatically promote members according to a defined set of rules
- Capture customer data in all channels and use these insights to help drive long-term and lifetime customer value
- Customers can access their individual accounts via the iVend Loyalty portal, to review and redeem rewards — and can choose to provide more information for targeted offers

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loyalty



iVend Passes

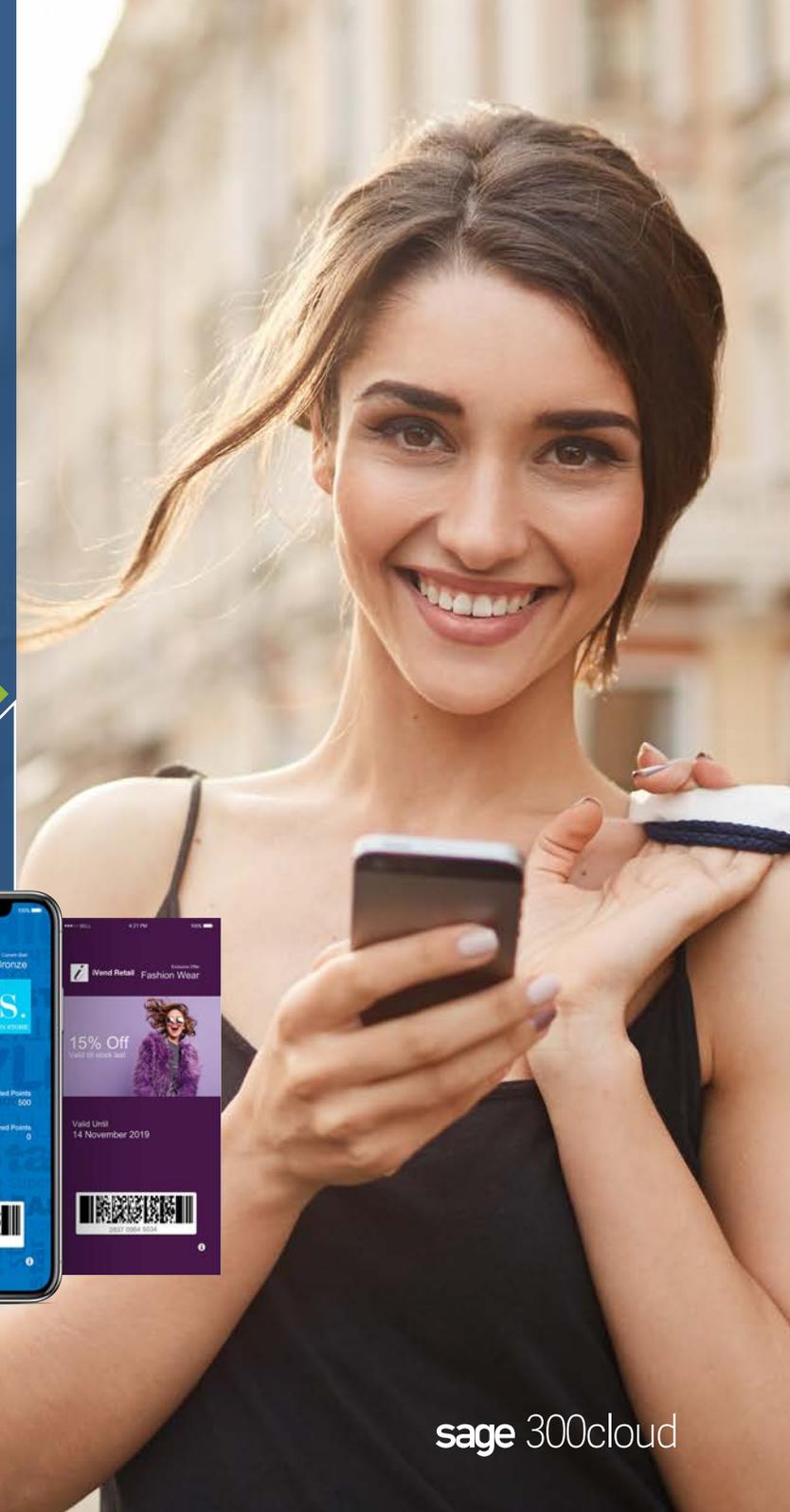
Building Loyalty Through The Device Consumers Can't Live Without

Three quarters of consumers won't leave home without their smartphone, and it's becoming an increasingly important touch point in the retail journey. iVend Passes helps retailers capture attention and stay top-of-mind with a cloud-based subscription service designed to support a variety of marketing initiatives delivered directly to shoppers' mobile phones. Offer coupons, tailored offers, gift certificates and loyalty cards, digitally, on iOS or Android mobile devices with integrated geo-marketing capabilities. Market to your customers in more imaginative ways and at a lower cost.

iVend Passes is a cloud-based subscription service designed to support a variety of marketing initiatives to shoppers' mobile phones.

Features:

- Electronically distribute loyalty cards, gift cards, coupons and passes to consumers
- Create your own digital cards and coupons to customize rewards schemes
- Enable customers to collect and redeem points across all channels, from a single location
- Connect more effectively with consumers in an environment-friendly manner



iVend Reporting and Analytics

Actionable Insights into Business Performance

Access business intelligence reports delivered on a single online dashboard that give you a 360° view of your enterprise to help you drive maximum return on investment.

Instantly generate customized reports or utilize 50+ pre-built reports with at-a-glance and drill-down views of your most important KPIs. Gain tactical insights to make faster and more effective decisions. iVend Reporting and Analytics can be viewed on-the-go from any iOS or Android device, giving your operations and leadership teams visibility into the sales and inventory data they need, when and where they need it. Put your data to work for you to make more informed decisions and optimize the success of your retail organization.

Features:

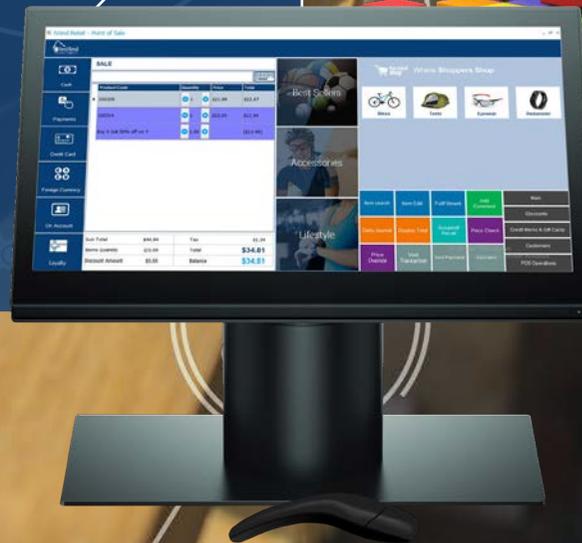
- Review the performance of products, product groups, customers, customer groups, promotions, channels and much more
- Quickly create reports that can be shared across the business to enable positive change
- Choose between standard and custom reporting tools for tailored feedback

iVend Extensibility

The iVend Retail software platform is designed to allow for significant extension of its capabilities, without major rewriting of code or changes in its basic architecture. iVend Extensibility provides an Add-on framework to facilitate programmers to enhance and extend the business logic of the application to accommodate new business requirements due to changing business requirements and the need for certain enhancements.



- Extend UI (User Interface) Layer, Business Logic, and Business Rules
- Create User Defined Fields (UDF) and User Defined Tables (UDT)
- Override events easily for most of the application activities
- Publish Add-ons at the store level and prioritize execution
- Access iVend DB Context for SQL Queries execution
- Leverage a rich API functionality that can be integrated with any standard ERP
- Integrate with any third party Payment Processor



iVend Hospitality

Designed to Optimise Your Food & Beverage Operations

iVend Hospitality provides a flexible and easy-to-use POS system to manage front of house operations, including split and partial bills, table management, servers, reservations and orders. Efficiently communicate with the kitchen to ensure correct and speedy customer order preparation. iVend Hospitality includes many advanced features such as Kitchen Order Tickets (KOT), KDS system integration, recipe and meal plan management.

iVend Hospitality is a fully integrated, restaurant management solution with a multilingual POS system designed to cater to the unique requirements of restaurants, bars, nightclubs and cafes of all sizes. The solution will improve your guest's appreciation and loyalty, reduce order and checkout times, create menu flexibility, decrease operational costs and allow you to focus on crafting a more unique dining experience.



AT THE TABLE



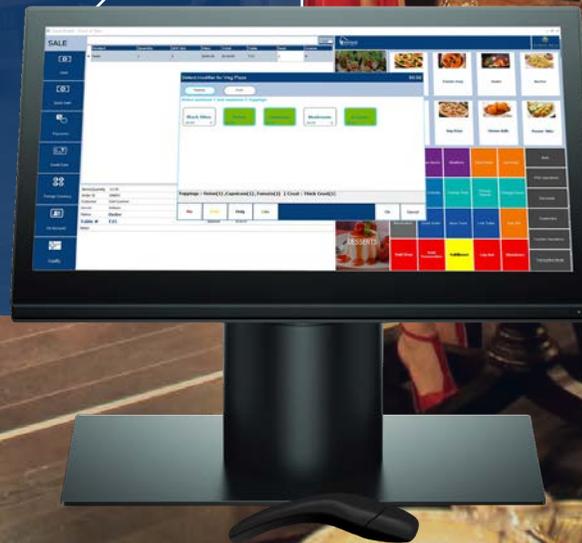
IN THE AISLE



ON THE ROAD



IN THE FIELD



iVend Optical

Complete Optical Point of Sale Software

iVend Optical is an industry vertical solution on the iVend Retail management suite designed for Retail Optical shops, Optometry Practices (with or without a retail dispensary), Retail sunglass stores and Ophthalmology clinics (selling RX eyewear).

Developed by a leading provider of software solutions, iVend Optical presents easy to use tools to manage optical Point of Sale, frame and contact lens inventory, and business development activities. iVend Optical seamlessly integrates all business processes from the POS at store to the planners at the Head Office lowering the overall cost of operations and simplifying expansion to help your business bring the bottom line into focus with increased profitability.

iVend Optical is intuitive to work with, even for non-technical roles, providing store owners with visibility into product and store performance, schedule and manage appointments with patient notifications, and allows retailers to easily distribute targeted customer promotions.



MID-SEASON
SPECIAL

Want to see if iVend Retail integrated with sage 300cloud is right for you?

Contact us today to learn how our professionals can support your plans to grow.



About iVend Retail

iVend Retail by CitiXsys is a cloud-based digital store platform for enterprise retail management. Our suite of integrated, omnichannel solutions empower retailers to provide exceptional customer experiences throughout the entire shopper journey. iVend Retail includes complete infrastructure and application management for head-office, back-office and customer-facing operations with software modules for point of sale (POS), mobile POS, customer loyalty, eCommerce, digital passes, retail reporting and analytics with out-of-the-box integrations to Magento Commerce, Sage 300cloud and X3, Microsoft Dynamics 365 Business Central, SAP Business One, S/4HANA and IS-Retail. Our solutions are available through a worldwide network of certified partners.

Visit ivend.com for more information and follow us [@iVendRetail](https://twitter.com/iVendRetail) on Twitter and [CitiXsys-iVend Retail](https://www.linkedin.com/company/citixsys-ivend-retail) on LinkedIn.



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Learn more about how iVend Retail seamlessly integrates with **sage 300cloud** via rich API functionality. 