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IQ POCKETSLIP INTEGRATION V2

P R E F A C E

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

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

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

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 Pocketslip Integration 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 in order to improve the IQ Pocketslip Integration document in some way or another.

Regards,

IQ Retail (PTY) LTD

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INTRODUCTION

The IQ Pocketslip Integration has been developed to create a hassle and paper free trail for products sold or services rendered. The user can now offer clients digital receipts. No more searching for a till-slip when stock needs to be returned or tax returns are prepared. Unique receipts are generated on the user's system and they are sent straight to the customers. It also minimizes fraud by up to 40% at the very least, due to the absence of paper slips.

The user needs to register with Pocketslip and setup the system and the customers have to download the Pocketslip application to their phones and register with the required details.



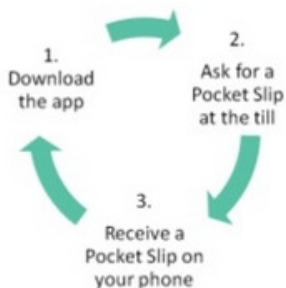
VALUE OF POCKETSLIPS TO THE CUSTOMER:

The Pocketslip technology stores a digital copy of the customer's receipt in the cloud for the period of 5 years. Customers can easily retrieve old receipts directly from the application to their phones.

When a customer registers to use the PocketSlip Application, there are a few terms and conditions, but usage of the App is FREE.

NOTE: If the customer is not yet registered at Pocketslip, the invoice will be kept in the cloud under his mobile number or email address. Once he is registered, all the invoices can be downloaded.

EASY TO USE - It's a 3 step process



VALUE OF POCKETSLIPS TO THE RETAILER:

The Pocketslip option allows for the retailer to save on paper rolls and the maintaining costs on slip printers. Custom Relationship Management and Marketing can use the information of customers and their buying history for market research. PocketSlip is very affordable, as the retailer or user pay-per-use.

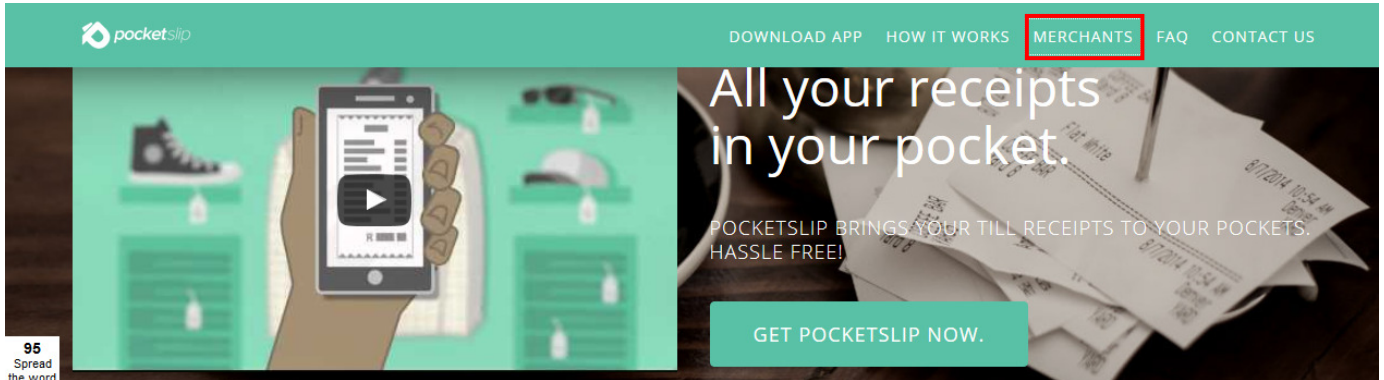
SETUP

Firstly, the user has to apply for a Pocketslip Outlet ID number and password by sending an email to support@pocketslip.zendesk.com.

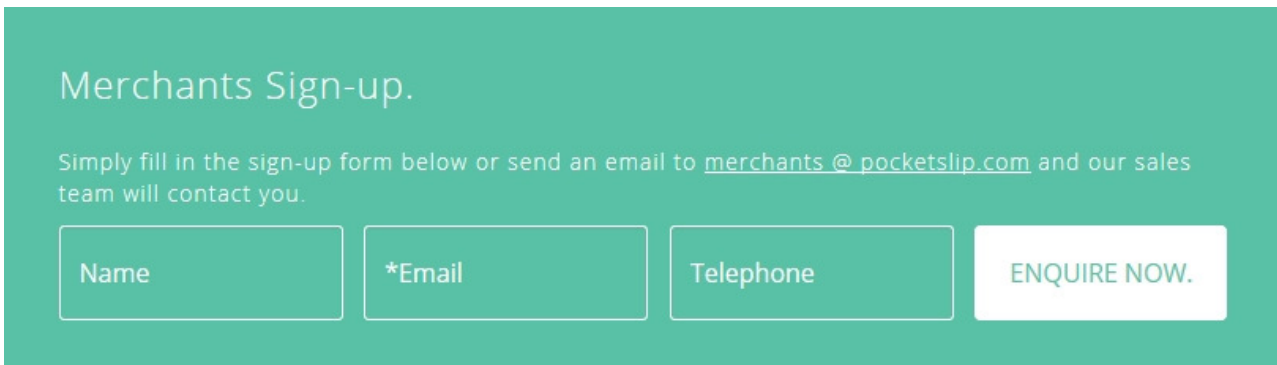
Pocketslip will send a form which needs to be completed and returned, with the company’s logo, address, phone number and email address. Each company or company group will receive the Outlet ID and password to login to Pocketslips.

The user is also welcome to visit www.pocketslip.com to see how the customer will integrate with Pocketslip to get the required invoice on a smart phone. The user also has the option to sign up via this website, by clicking on the Merchant option at the top of the screen.

PocketSlip Website:



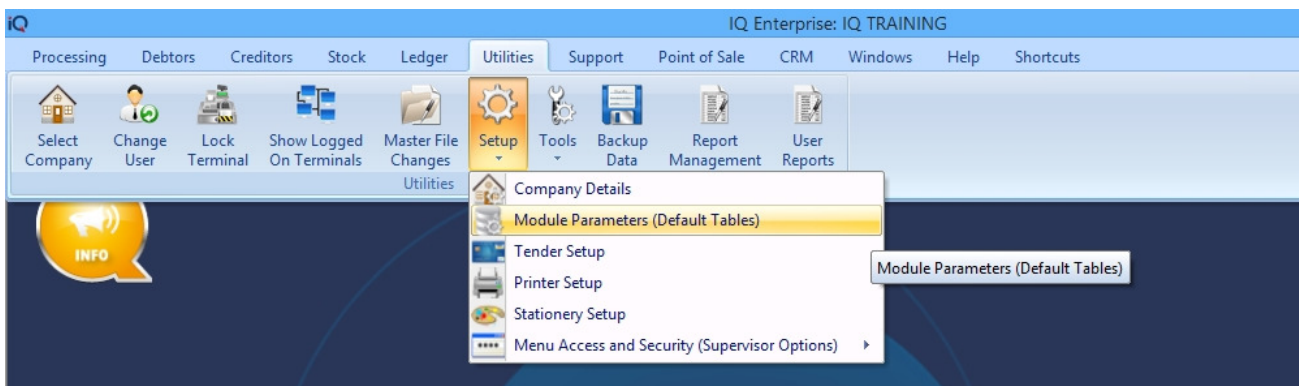
The user has to scroll down until the following appears on the screen:



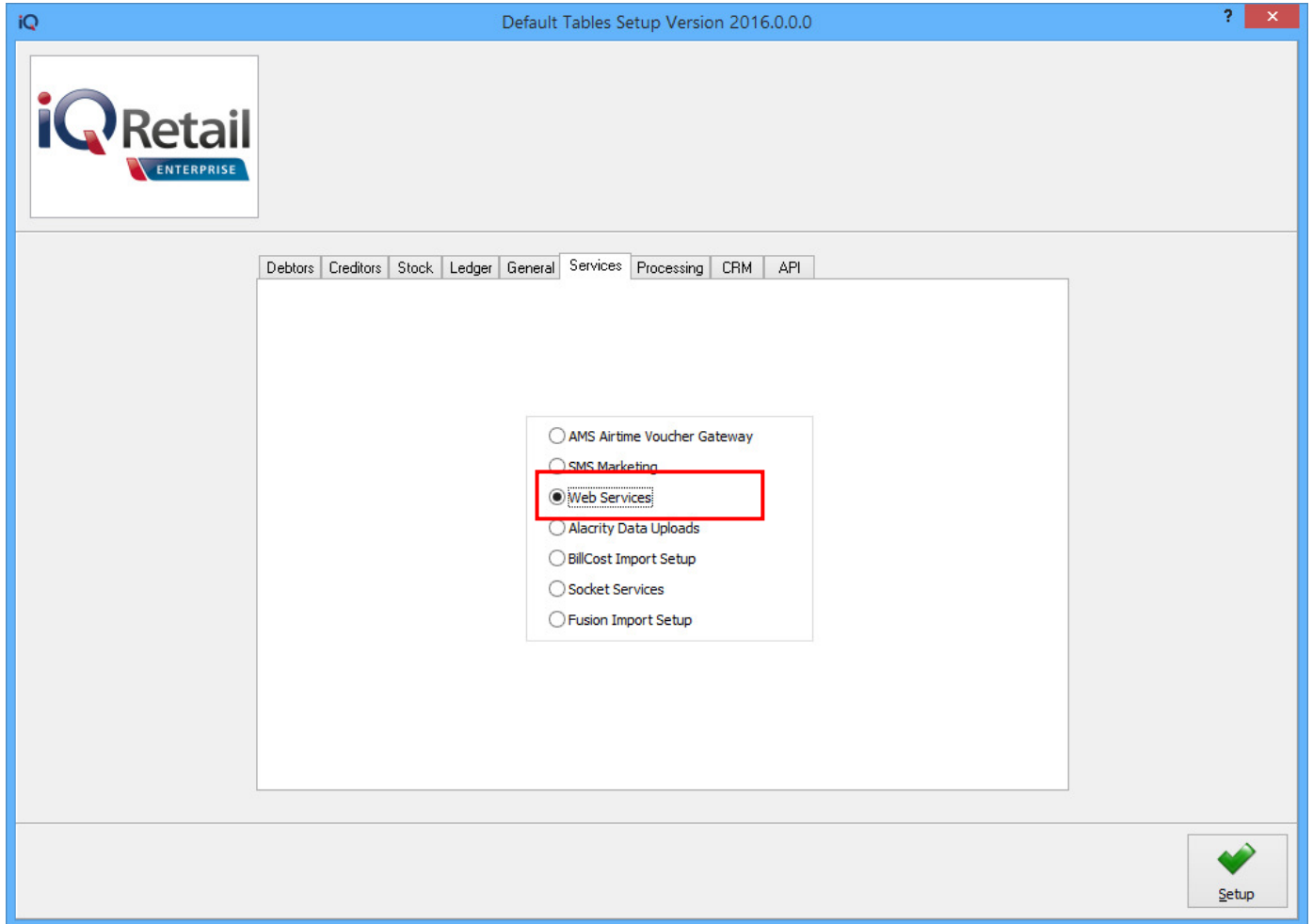
Complete the required information and click on the Enquire Now button. The will then be contacted either by the pocketSlip sales team.

MODULE PARAMETERS

For the user to enable the system to send invoices to the customer’s phone, the Web Services have to be setup. From the IQ main menu → Utilities → Setup → Module Parameters.

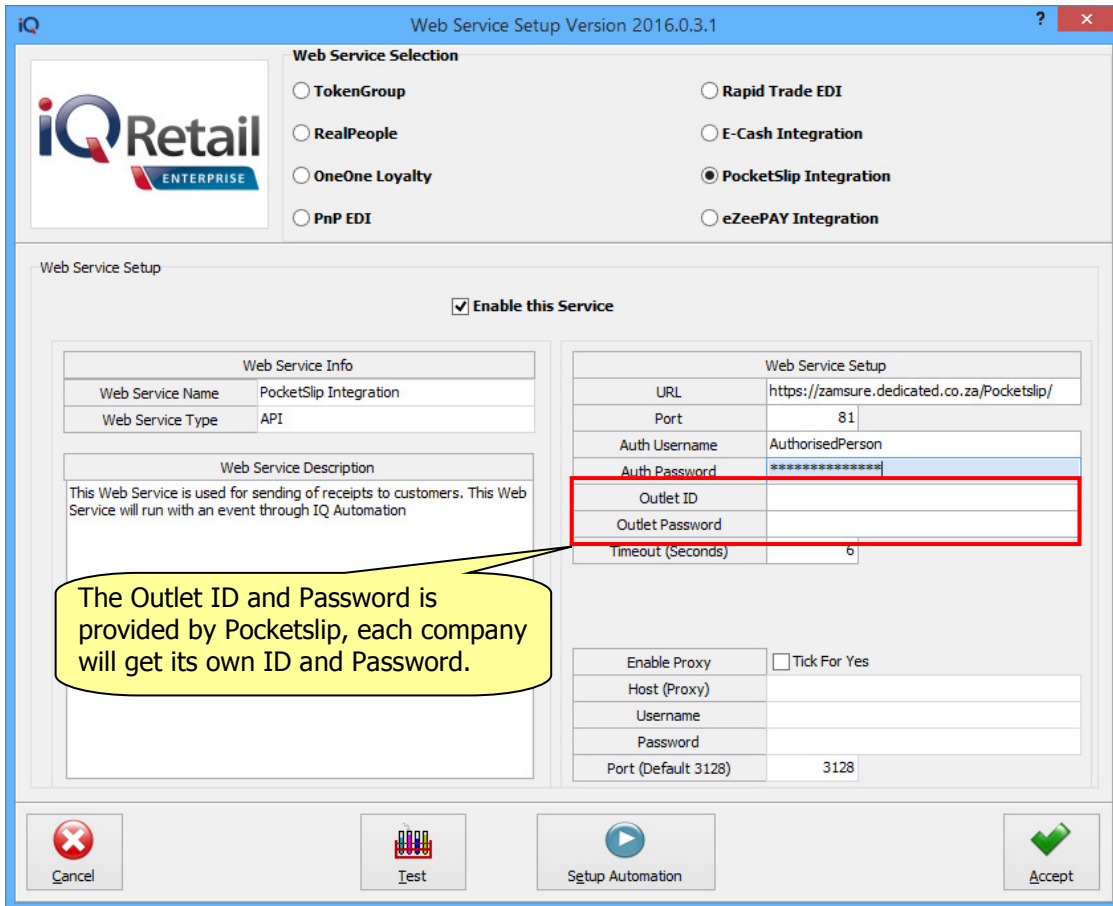


Select Services Tab from the Default Tables Setup → Web Services → click on the Setup button on the bottom of the screen.



The Web Services Setup screen will appear.

Select the PocketSlip Integration option from the Web Service Selection at the top of the screen.



Enable Pocketslip integration service, by ticking the box.

WEB SERVICE INFO

The Web Service Info displays the name PocketSlip Integration and that it is an API type service.

WEB SERVICE DESCRIPTION

The Web Service Description displays that this web service is used for sending receipts from the user’s POS and\or Invoice module to the customers’ cell phones.

WEB SERVICE SETUP

URL

The URL has a default value generated: <https://zamsure.dedicated.co.za/Pocketslip/>

PORT

The default Port number is 81.

AUTH USERNAME

The URL is user protected, thus a username and password is required to log into the web site. This will be the username of the party authorised to log into the web site.

AUTH PASSWORD

The URL is user protected, thus a username and password is required to log into the web site. This is the password of the authorised party.

OUTLET ID

The Outlet ID is the number used for the user's company, provided by PocketSlip.

OUTLET PASSWORD

The Outlet Password is the company's unique password, provided by PocketSlip.

TIMEOUT (SECONDS)

The Timeout is measured in seconds and indicates how long the system should try to establish a connection. This value can be edited.

ENABLE PROXY

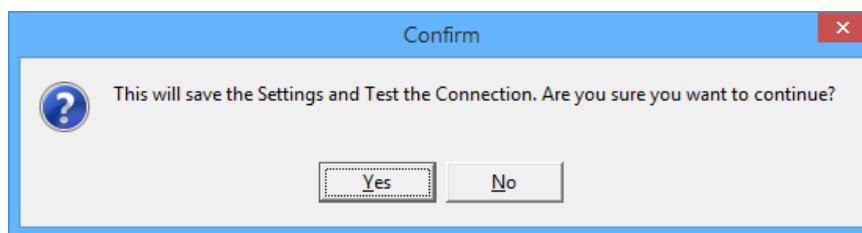
If the user needs to use a proxy to connect to the PocketSlip Web Site, tick the box next to the Enable Proxy option to enable it. The user will have to enter the Proxy Host, Username and Password.

PORT

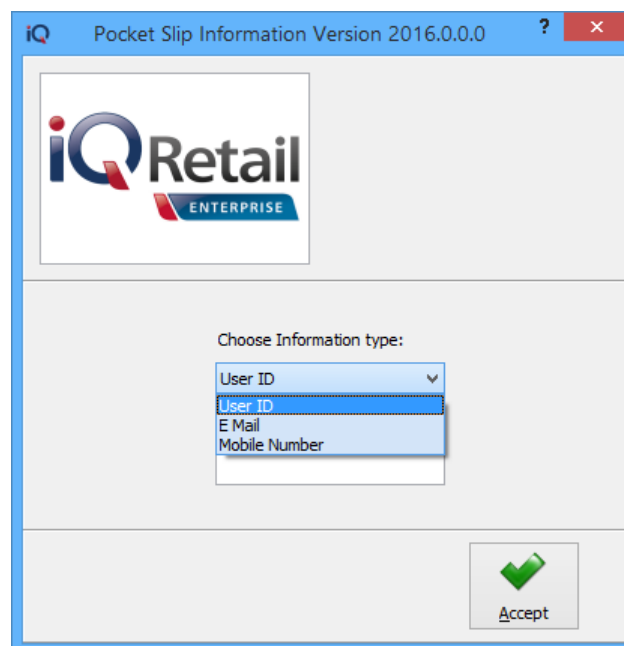
Enter the Port used for the Proxy, the default port is 3128.

BUTTON FUNCTIONALITY**CANCEL**

The Cancel option allows the user to close the Web Site Setup screen, without saving any changes made.

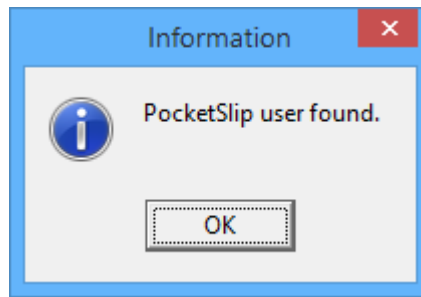
TEST

The Test option allows the user to save the settings and test if the Setup is correct.

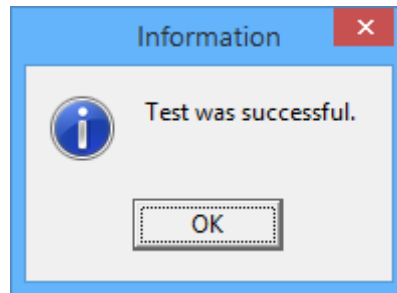


The user is able to select which Information Type to use for a customer, the User ID (the customer receives this ID number as soon as registered on PocketSlip), email or mobile number.

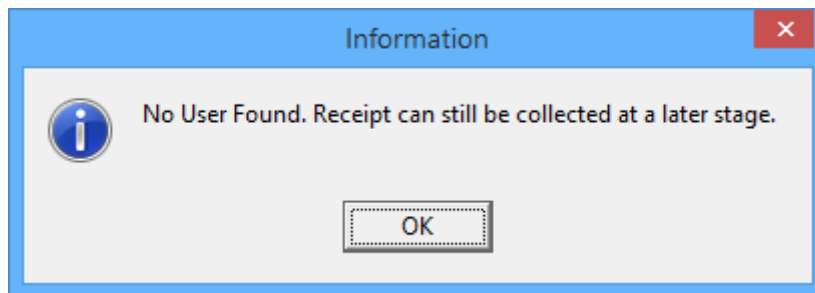
Enter the customer's information and click on Accept.



If a valid PocketSlip User ID was entered, the system will confirm that PocketSlip found the user.

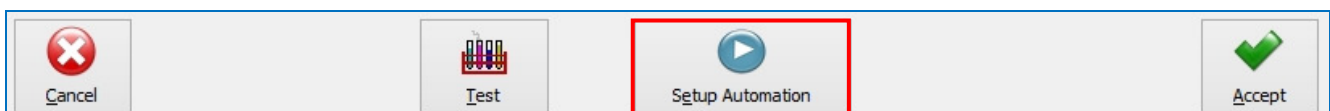


The system will confirm that the test was successful.



If the customer is not yet registered on PocketSlip, the system will not find be able to identify the User. The system will still send the invoice to the cloud, where it will be sored until the user identification (mobile number or email address) used is registered at PocketSlip. All invoices can then be downloaded from the cloud.

SETUP AUTOMATION

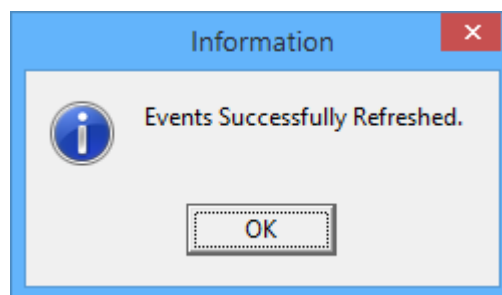


The Setup Automation option allows the user to see a PocketSlip Events Log.

The IQ Alacrity screen will appear. This is a log of all the Events that were done dynamically in IQ with the push of a button. These Events are set up in IQ Automation.

Number	EventID	Name	Last Run	Status Type	Status Information
231295	20	IQEVENT_POCKETSLIP	22/04/2016 16:11:49	OK	
231302	20	IQEVENT_POCKETSLIP	22/04/2016 16:16:44	OK	
231308	20	IQEVENT_POCKETSLIP	22/04/2016 16:21:36	OK	
231315	20	IQEVENT_POCKETSLIP	22/04/2016 16:27:35	OK	
231322	20	IQEVENT_POCKETSLIP	22/04/2016 16:32:28	OK	
231328	20	IQEVENT_POCKETSLIP	22/04/2016 16:37:22	OK	
231334	20	IQEVENT_POCKETSLIP	22/04/2016 16:42:15	OK	
231341	20	IQEVENT_POCKETSLIP	22/04/2016 16:47:09	OK	
231347	20	IQEVENT_POCKETSLIP	22/04/2016 16:52:11	OK	
231353	20	IQEVENT_POCKETSLIP	22/04/2016 16:57:01	OK	
231361	20	IQEVENT_POCKETSLIP	25/04/2016 08:01:48	OK	
231367	20	IQEVENT_POCKETSLIP	25/04/2016 08:06:51	OK	
231373	20	IQEVENT_POCKETSLIP	25/04/2016 08:11:47	OK	
231380	20	IQEVENT_POCKETSLIP	25/04/2016 08:16:41	OK	
231385	20	IQEVENT_POCKETSLIP	25/04/2016 08:20:09	OK	
231393	20	IQEVENT_POCKETSLIP	25/04/2016 08:27:33	OK	
231400	20	IQEVENT_POCKETSLIP	25/04/2016 08:32:28	OK	
231406	20	IQEVENT_POCKETSLIP	25/04/2016 08:37:22	OK	
231412	20	IQEVENT_POCKETSLIP	25/04/2016 08:42:13	OK	
231419	20	IQEVENT_POCKETSLIP	25/04/2016 08:47:06	OK	
231425	20	IQEVENT_POCKETSLIP	25/04/2016 08:51:59	OK	
231431	20	IQEVENT_POCKETSLIP	25/04/2016 08:56:53	OK	

The PocketSlip Automation event is already setup in IQ Enterprise. Every time The Setup Automation Event button at the bottom of the screen is selected, the Automation Event is refreshed.



ACCEPT

The Accept option allows the user to save the setup as it is.

DEBTORS ACCOUNTS

For a debtor to receive invoices via PocketSlips, the option has to be enabled for the debtor in Debtors Maintenance.

From IQ main menu → Debtors → Maintenance → Select appropriate Account → Edit → select Web Services / Integration.

Debtors Maintenance IQ TRAINING Version 2015.0.3.0

Account Details | Picture | Multiple Contacts/Delivery Addresses | User Defined Data | Recurring Charges | B2B / EDI | Store Departments | **Web Services / Integration**

PocketSlip Detail

UserID	123456
E mail	someone@company.co.za
Mobile Number	0820000000

Enable PocketSlip for Debtor

Show Hints Accept

Any one of the user identifier options can be completed and the box next to "Enable PocketSlip for Debtor" has to be ticked. Click on Accept to save the PocketSlip information for the debtor.

USER ID

The User ID is the reference number received when the customer is registered on PocketSlips. Customer has to provide this User ID. Customer registration at PocketSlip will be explained later in this document (see page 14).

EMAIL

The customer's email used to log in on PocketSlips.

MOBILE NUMBER

The customer's cell phone number, used to log in on PocketSlips.

PROCESSING USING POCKETSLIPS

At this stage Pocketslips can only be used for Cash and Account Sales.

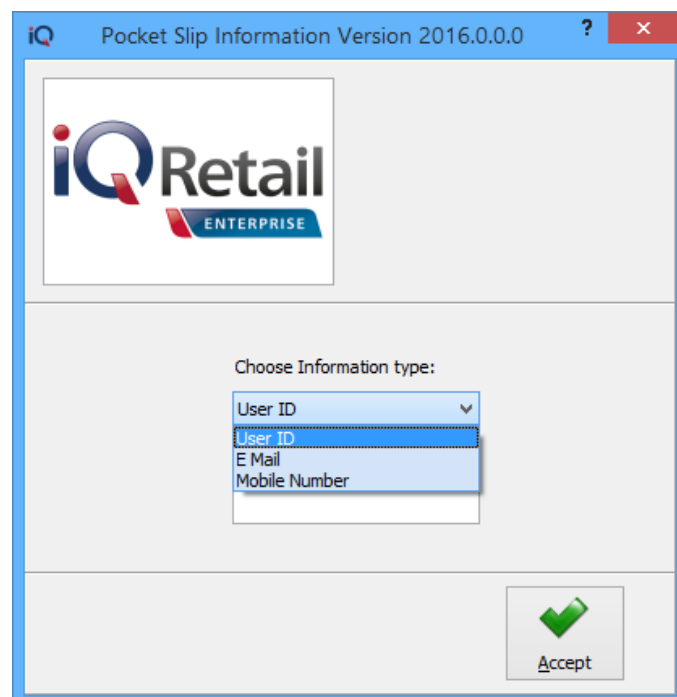
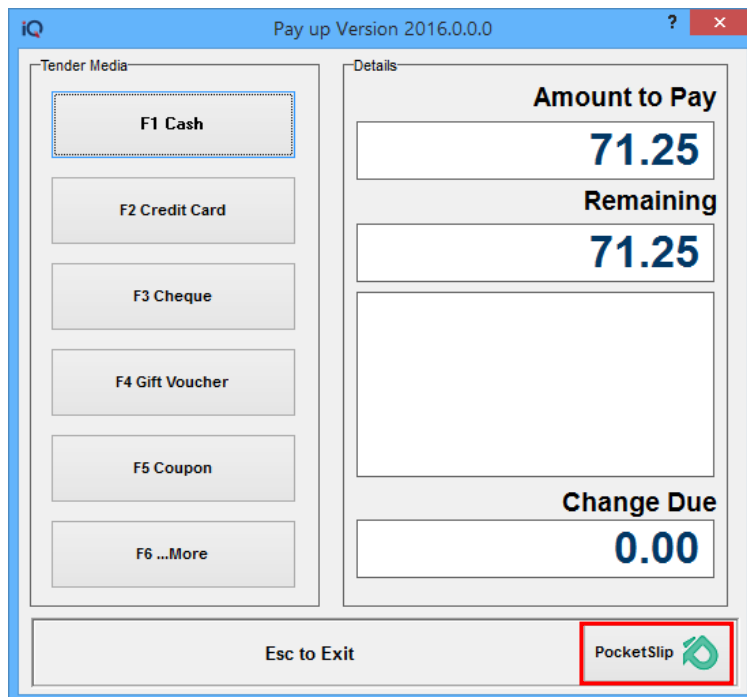
If the user has not yet registered on PocketSlip, the processed invoice will be sent to the cloud and the customer will receive an SMS which notifies them of their receipt. The SMS will enable the customer via a hyper-link in the SMS to download the Pocketslip application. Once the customer is registered, all the invoices linked to that mobile number can be downloaded.

NOTE: The user can also load the PocketSlip to his phone, by scanning the PocketSlip barcode.

All sales sent to the PocketSlip system, will have an additional

CASH SALES

While processing a cash sale, the moment the tender screen appears, the user can click on the PocketSlip button at the bottom of the screen, which will ask for the customer's PocketSlip User ID.



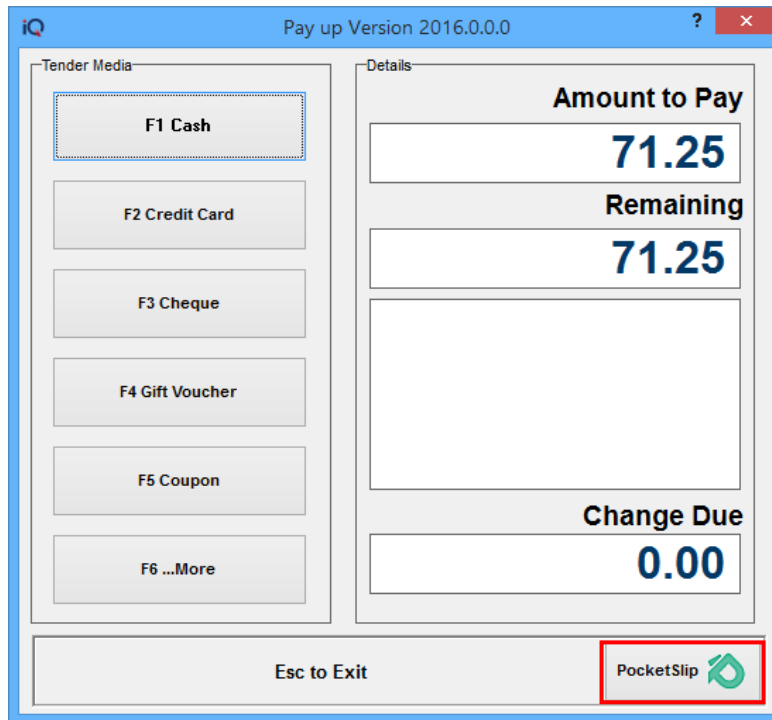
The user can select the Information Type to use by clicking on the pull down arrow for User ID.

Capture the correct identification as per the type selected and proceed with the payment.

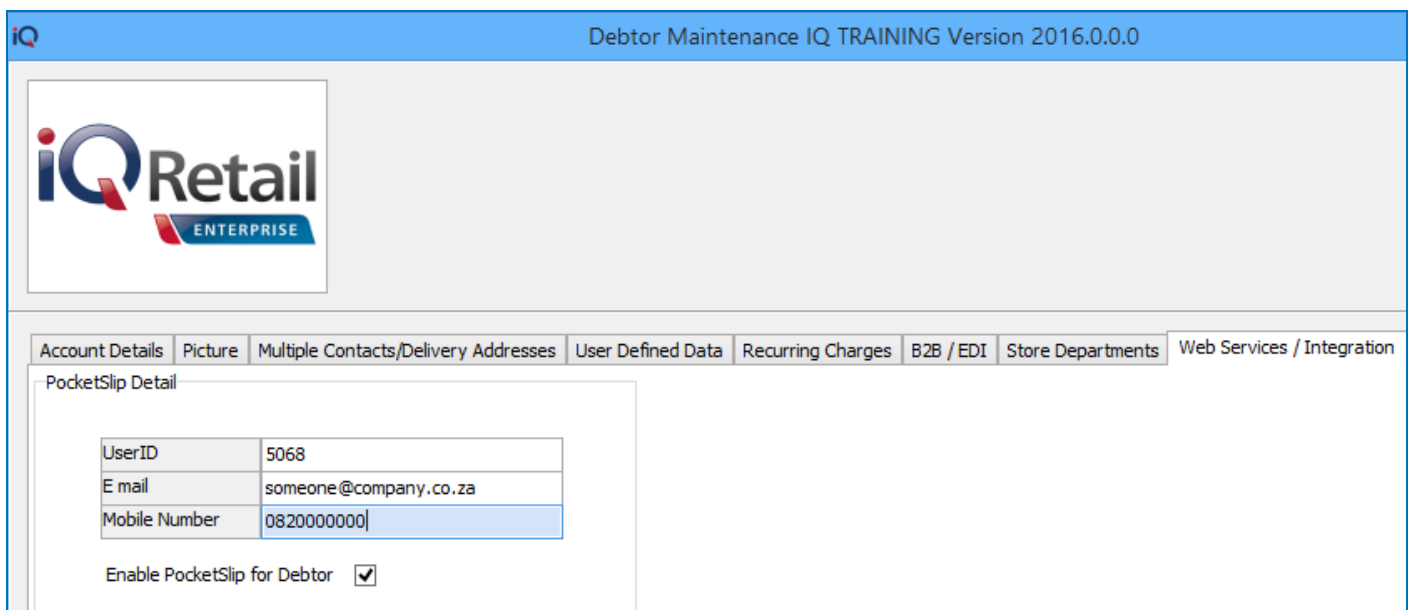
NOTE: The PocketSlip will only be sent to the customer once the sale is completed. If the sale is cancelled for any reason before completion, no transaction will be sent to PocketSlips.

ACCOUNT SALES

For COD accounts, the user is able to click on the PocketSlip button on the bottom of the screen, once the tender screen is accessed.



For any other debtors, the PocketSlips will be sent to the customers, if they have been enabled in Debtors Maintenance.

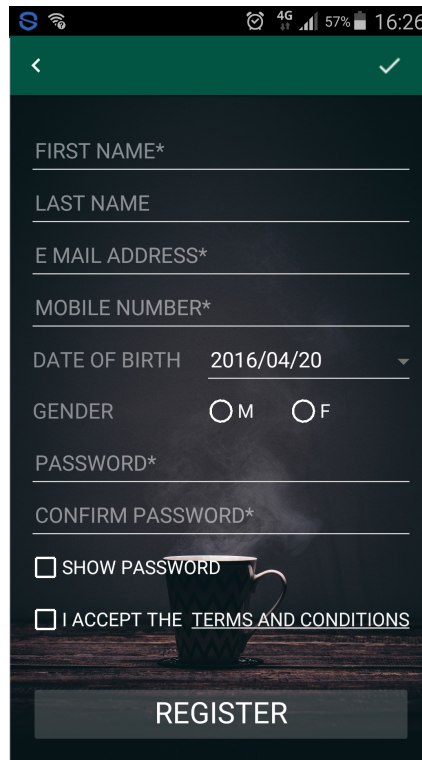


HOW DOES A CUSTOMER REGISTER ON POCKETSLIP?

PocketSlip is available on the internet at the website www.pocketslip.com.

The PocketSlip App is available on the iPhone App Store or at Google Play.

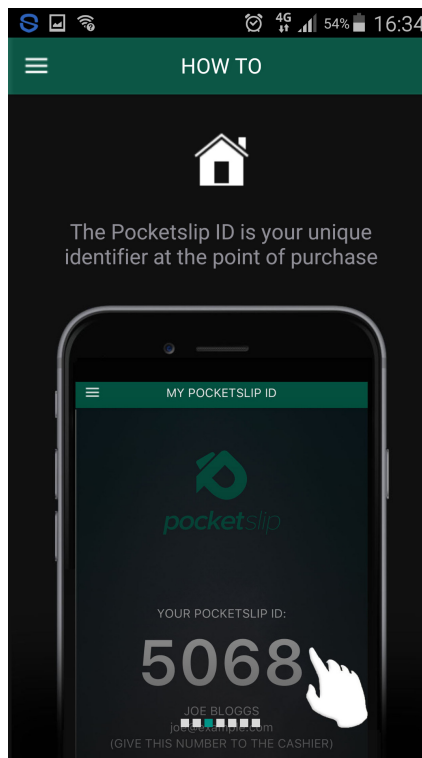
Download the App to the phone and run the installation process and open PocketSlips.



Registration form fields:

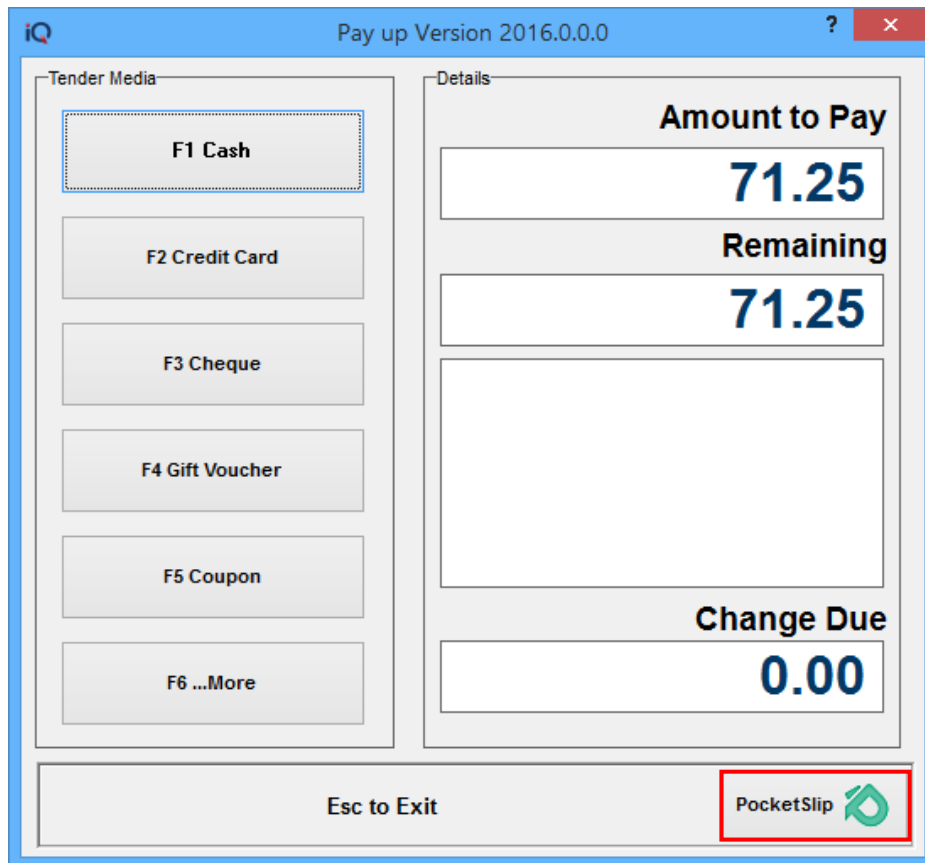
- FIRST NAME*
- LAST NAME
- E MAIL ADDRESS*
- MOBILE NUMBER*
- DATE OF BIRTH 2016/04/20
- GENDER M F
- PASSWORD*
- CONFIRM PASSWORD*
- SHOW PASSWORD
- I ACCEPT THE TERMS AND CONDITIONS
- REGISTER

Capture the required information (all the fields marked with a * are required fields) and tap on Register.

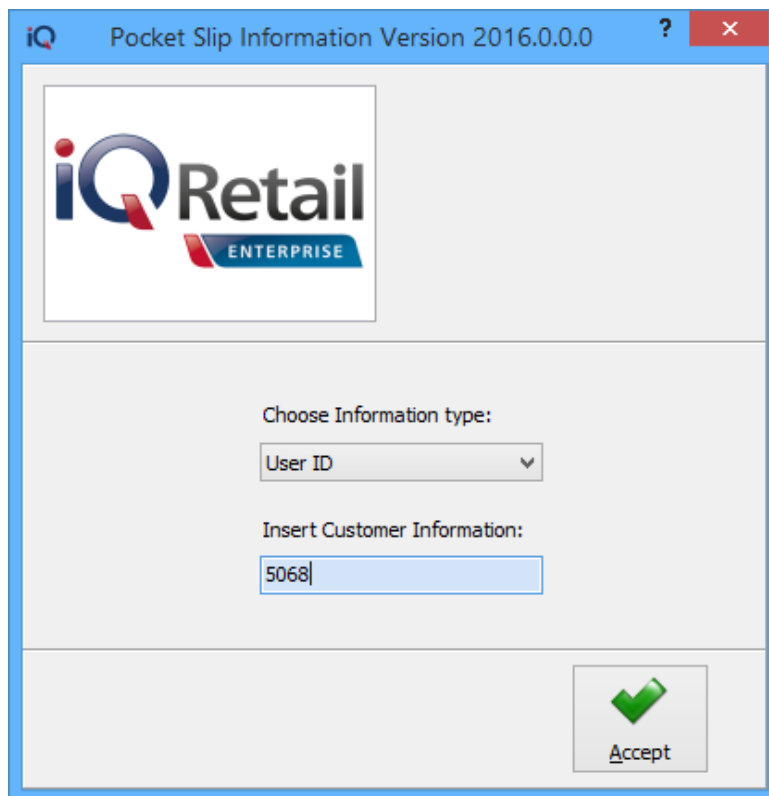


Each customer will receive a unique PocketSlip number, which can be given to the cashier when paying for an invoice. All data sent each unique PocketSlip number, is save in the cloud and is username and password protected.

If a customer asks for a PocketSlip the user will, before entering the Tender Media and Amount, click on the PocketSlip button on the bottom of the Tender screen, which will appear as soon as the F1 Sub-Total option was selected.




The user can select the information type as User ID and enter the customer's PocketSlip number in the information field.



Click on Accept and then enter the Tender Media and amount(s). The generated invoice will be sent to the customer's mobile phone as soon as the transaction is completed.

IQ TRAINING
Address details
Tel No: 0218800420
Email address




Tax Invoice

Till 1 Sale # 340	15:33:55	25/04/2016	
Code	Description	Qty	Total
0000001011	NIKE PANTS	1	71.25
Vat Included			8.75
Subtotal			71.25
Cash			71.25

Cashier ADMINISTRATOR

**** Computer generated copy of original ****
Innovative Accounting Software by IQRetail

Thank for your support
visit our website
www.xxxxx.co.za
office hours



"Get this receipt on your phone. Download the Pocketslip app on iOS or Android and ask your store manager for more info. www.pocketslip.com"

If an invoice was not sent to a mobile number, the customer can scan this barcode to load the invoice to the PocketSlip Cloud.

NOTE: If the transaction is for whatever reason cancelled, no PocketSlip will be generated.

FREQUENTLY ASKED QUESTION:

HOW SAFE IS THE DATA?

Every measure possible is used to ensure that data is protected in every process. Data is encrypted in the transmission and storage phase and PocketSlip's servers are set up with multiple data security measures.

- End of Document -