

Needs at a glance

Every need in the catalogue, read from its cards at this build: what the customer asks, the verdict, and the door it is built through. *Ready, with limits (3)*: three limits to tell the customer. Each card in full: developer.ivendnext.com/needs/.

Prices and promotions

The customer asks	Verdict	Door
A coloured row in the Desk product list for the products on promotion	Not yet	Request
Filter the product list to the products on promotion	Ready, with limits (3)	Outside app
A member rate that multiplies with a promotion, taken after it	Ready, with limits (5)	Sandboxed function
Members pay less, by tier	Ready, with limits (5)	Configure
Our prices, promotions and coupons	Ready, with limits (3)	Configure
A price checker shoppers use on the shop floor	Ready, with limits (1)	Outside app
A price list as a document with a photo for each item	Ready, with limits (4)	Outside app
Sell an extended warranty with a product	Ready	Configure
A selling price list worked out from another (a multiple of the buying list, wholesale as a share of retail) and kept in step	Ready, with limits (7)	Outside app
A surcharge added to the sale because of the payment method or a condition	Not possible	None

Stock and buying

The customer asks	Verdict	Door
Add our own step or screen to Handheld	Not yet	Request
Alerts before expiry and below the minimum stock, and a draft stock transfer request made from them	Ready, with limits (7)	Outside app
A branch sees the stock of its own store and the head office's, no other	Ready, with limits (4)	Configure
Each pack carries its own printed code; check it when stock is received, moved, counted and sold, and tell a lost pack from a sold one	Ready, with limits (8)	Configure
The list of stock counts showing the quantity, the difference and the stock value	Ready, with limits (4)	Outside app
Merge several stock counts into one	Ready, with limits (5)	Desk action
A notification a number of days before a date on a shop's own record, such as a batch's expiry	Ready, with limits (2)	Configure
Read a pharmacy pack's 2D code at the scan, and refuse an expired pack	Ready, with limits (2)	Scan source
Receive goods and count stock with a handheld scanner	Ready, with limits (3)	Configure
Record the IMEI of every phone sold, and never sell one twice	Ready, with limits (2)	Configure
A reminder per store when its stock falls below a set level	Ready, with limits (4)	Configure
Scan a unit's own barcode or a handset's tag, and refuse a unit already sold	Ready, with limits (3)	Scan source

The customer asks	Verdict	Door
The till sells the batch that expires first	Ready, with limits (5)	Configure
Track batches and their expiry dates	Ready	Configure

Customers and loyalty

The customer asks	Verdict	Door
A customer's shopping history or trend on the till: recent visits, the store, who served and the discount on each	Ready, with limits (5)	Partner page
Customers earn and spend loyalty with iVendNext's own programme	Ready, with limits (1)	Configure
Customers spend their cash back, store credit or loyalty points balance at the till	Ready, with limits (2)	Wallet
Every booked sale earns loyalty points in our own programme	Ready, with limits (2)	Outside app
Every new customer must give a phone number or an e-mail	Ready, with limits (2)	Field rules
Find what a customer bought before by typing their phone number	Ready, with limits (3)	Partner page
A gift card for a spend over a threshold, spendable after a hold	Ready, with limits (5)	Outside app
A one-time code sent to the customer before a new customer is made at the till	Ready, with limits (2)	Capture on an event
Our CRM sees our customers and their sales	Ready, with limits (2)	Outside app
A question or a check when the cashier picks an existing customer for the sale	Not yet	Request
Show the member's tier and status when the cashier asks	Ready, with limits (2)	Till key

Till controls and approvals

The customer asks	Verdict	Door
An answer for the cashier during the sale: a message, or a seal number, a reference or a warranty card number added to the sale	Ready, with limits (3)	Till key
A beep and a yes-or-no question when the cashier scans an item we flagged	Ready, with limits (2)	Capture on an event
Cashiers count the drawer without seeing what the till expects	Ready	Configure
Change the order of the till's steps, or what every cashier sees	Not yet	Request
Check a product's warranty at the till	Ready, with limits (3)	Till key
A coded reason when a cashier voids, returns or discounts	Ready, with limits (3)	Configure
A coupon only a new customer may use, or only customers of one group	Ready, with limits (6)	Check before payment
A coupon or a loyalty points balance pays no more than part of the sale	Ready, with limits (1)	Check before payment
A delivery partner's screen, or any screen of ours, opened from a key on the till	Ready, with limits (1)	Partner page
A discount above a set limit needs a manager's approval	Ready, with limits (2)	Check before payment
Insurance co-payment: the insurer pays part of a prescription and the customer the rest	Not yet	Request
A manager must approve a sale over a set amount	Ready, with limits (2)	Check before payment
The next sale starts with the sales person of the last completed sale, splits included	Not yet	Request

The customer asks	Verdict	Door
No line at a placeholder price such as 0.01	Ready, with limits (1)	Check before payment
No more than 50 of one item on a line	Ready, with limits (1)	Check before payment
No more than a set number of lines on one sale	Ready, with limits (1)	Check before payment
No more than so many manager discount approvals per store per day	Ready, with limits (3)	Check before payment
No store credit for a walk-in customer, no on-account for a cash customer, and methods that may not be combined	Ready, with limits (2)	Check before payment
One more detail on a line, for goods with no serial number	Ready, with limits (2)	Configure
A partner's voucher or PIN made when the sale is paid and printed on the receipt	Not yet	Request
A prescription number is required before a prescription item is paid for	Ready, with limits (1)	Check before payment
A question when the quantity of a line changes, before Pay	Not yet	Request
A rule that depends on which terminal the sale is on, beyond its POS profile	Not yet	Request
Selling below the minimum price needs a manager's approval	Ready, with limits (2)	Check before payment
Show or relabel the discount price or the total including tax on the till	Not yet	Request
Show our own fields on the till, call them by our words, hide the ones we never use	Ready, with limits (1)	Field rules
A warning when an item is scanned (another batch has less shelf life), with the cashier tapping to carry on	Ready, with limits (5)	Capture on an event

Documents and print

The customer asks	Verdict	Door
The approver must give a reason when rejecting a purchase order, and it is kept on the document	Ready, with limits (4)	Desk action
A button on a record that rechecks stock in our ERP or assigns a pick route	Ready, with limits (1)	Desk action
Check a limit (an item's maximum discount, say) against the ceiling only when someone sets or changes it, not on every edit of the record	Ready, with limits (3)	Event feed
A code must follow our pattern	Ready, with limits (1)	Save rules
Documents numbered our way	Ready	Configure
An e-mail at each approval step with the purchase order's PDF attached, and the uploaded CSV	Ready, with limits (4)	Configure
Each store's purchase orders or transfers are approved by that store's manager	Ready, with limits (1)	Configure
Extra fields on a purchase order and its lines, a goods receipt, a stock transfer, an expense or the till close	Ready, with limits (1)	Manifest
A field filled in from other fields when the record is saved	Ready, with limits (2)	Save rules
A field must be filled when another field holds a value	Ready, with limits (1)	Save rules
Fields cannot be changed once the document is approved	Ready, with limits (1)	Save rules
The final receipt printed while the till is offline	Not yet	Request
A gift receipt with no prices	Ready	Configure

The customer asks	Verdict	Door
Keep each customer's prescriptions in iVendNext	Ready	Manifest
Keep our own records, such as a warranty register, in iVendNext with their own screens and print formats	Ready, with limits (1)	Manifest
Keep the controlled-drug register the law asks for	Not yet	Request
A layout of its own for each of a few distributors' invoices	Ready, with limits (5)	Manifest
Only the receiving store receives a transfer; only a supervisor cancels it	Not yet	Request
Optical lab orders tracked in iVendNext and sent to the lab	Ready, with limits (1)	Manifest
Our address, tax number and returns policy on the receipt	Ready	Receipt settings
Print shelf labels from the till	Ready, with limits (1)	Label layout
A purchase order blocked by data our ERP holds; a goods receipt checked against the supplier's terms	Not yet	Request
Purchase orders or transfers over an amount need approval	Ready, with limits (1)	Configure
A receipt with our logo, tax number and address, a line per VAT rate, in a second language	Ready, with limits (5)	Manifest
Reprint a receipt for a past sale	Ready, with limits (1)	Configure
The same item or code may not appear twice in one document	Ready, with limits (1)	Save rules
Send the customer the receipt on WhatsApp	Ready, with limits (2)	Receipt settings
Show more of the item's own details on the receipt	Ready, with limits (1)	Field rules
When a new item is first saved, the user confirms that batch and expiry are on and the item is linked to its parent	Ready, with limits (5)	Save rules

Reports and data

The customer asks	Verdict	Door
Head-office reports and our BI tool fed with sales and stock	Ready, with limits (3)	Outside app
Open quotations cancelled every night; a report sent every morning	Ready, with limits (1)	Outside app
A report of each member's cash balance for any dates, with the opening and the closing figure	Ready, with limits (3)	Outside app
A statement of what each customer owes, printed and sent on a schedule	Ready, with limits (3)	Configure

Integrations, payments and hardware

The customer asks	Verdict	Door
Build our connector inside iVendNext's integration framework	Not yet	Request
Click and collect — the store sees which web orders to pick and which customers are coming to collect	Ready, with limits (7)	Manifest
Customers pay with a buy-now-pay-later provider	Not yet	Request
Orders from our own online shop come in; stock and prices go out	Ready, with limits (2)	Outside app
Our Acumatica ERP receives sales, stock moves and purchasing	Ready, with limits (3)	Our connector
Our app gets its own queue of what changed, with business labels	Ready, with limits (1)	Event feed
Our ERP and iVendNext kept in step: items, prices, stock and purchase orders	Ready, with limits (4)	Outside app
Our order-management or warehouse system linked to the stores	Ready, with limits (2)	Outside app
Our system hears about every sale, return and stock move	Ready, with limits (3)	Outside app

The customer asks	Verdict	Door
Our WooCommerce shop linked to the stores	Ready, with limits (2)	Our connector
Take card or mobile-money payments through our own provider	Ready, with limits (1)	Payment connector
The tax authority's result, QR code and seal on each sale and receipt	Ready, with limits (1)	Fiscal reader

Setup and administration

The customer asks	Verdict	Door
Change the limits and who is told in one settings page, not in each rule	Ready, with limits (3)	Event feed
A column the retailer wants on a record's list	Ready, with limits (2)	Configure
Each role sees and does only what it should	Ready, with limits (2)	Configure
Our country's tax and e-invoicing rules	Not yet	Request
A server in each store	Not yet	Request
Several companies, countries or currencies in one site, with connectors	Not yet	Request
A tax number on one customer only	Ready, with limits (7)	Save rules