



C03 - Discussion Sheet for Candela

Customer Name: _____

Candela Version: _____

Terminals / POS: _____

Replicated Shops: _____

LumenSoft Rep: _____

Signatures: _____

C03 - Discussion sheet for Deployment of Candela

Purpose: The purpose of this document is to get information from customer related to his business, in a structure manner. Based on this information we should fill up the candela configuration sheet C04.

<http://lumensoft.biz/images/stories/downloads/C04.Candela%20Configuration%20Sheet%20for%20customers.doc>

So during discussion session, C04 should be available and filled up. After the discussion session, customer support and deployment engineer will configure Candela according to customer business needs.

Candela Version:

Reconfirm the version of the Candela (Personal, professional, or enterprise) – We should have this information from Marketing

No of terminals or computers connected to server (personal edition)

Action: Install the license into candela database

Hardware Configuration Head office:

Consult hardware specification document A01, following is the path

<http://lumensoft.biz/images/stories/downloads/A01.Hardware%20Requirment.doc>

Computer Specifications:

Server configuration depends upon the number of SKU, number of shops to be connected or configured, daily transactions of sales etc.

Invoice format:

Which printer is finalized?

Custom invoice or standard invoice?

Size of receipt – 3 inch, 5 inch continuous sheet, or A4 size, or custom size

Code and/or name, invoice number, hard copy availability, 2 print copies,

Barcode printer (Laser or Barcode):

Check if barcode printer required or not?

Capital investment availability, number of barcodes to be printed daily/weekly,

Hardware and Other Items Sheet

S.No	Items	Required	Specifications
1	Receipt Printer		
2	Scanner		
3	Barcode Printer		
4	Pole Display*		
5	Cash Drawer*		
6	Barcode Stickers		
7	Invoice Format		
8	UPS		
10	Connectivity		
11	LAN for server		
12	Hand Held Scanner		

* Pole Display: Check computer port for COM port displays

* Cash Drawer: Check cash drawer interface and receipt printer

UPS Battery (Sealed or Wet battery): How frequently electricity fails, the duration of back up required, availability of generator etc.

Barcode Sticker Format: Length based on label or tag, company name on barcode, size or color printing, product name etc. Show available samples

Barcode Sticker Vendor: Required if laser printer is to be used

Head office Connectivity: Only required for professional or enterprise version
Fixed IP is present or not, DSL or WiMAX, fixed IP on dialup, fixed phone line

Head office LAN setup: Number of computers in head office, warehouse within head office, new LAN or existing network, virus protection policy

Other: Hand Held Scanner and Spare Computer Physical audits, layout of warehouse and shops, types of products,

Action: Prepare a “Hardware & Other items sheet” above

Operational Details

- No of shifts & no of terminal in operation (decide about shop auto closing)
- Discuss the time issue in reports if shop is closed after 12 Mid-night. Solution may be to change system time and then don't show time on sales invoice.
- Values and Quantities configuration: Decimal points in quantity and decimal points in value
- Requirement of user price? (if required then training will be given during product definition)
- Security Settings: Who will operate the system and how many user groups
- Discuss invoice update and delete rules (we may be required to change shop user settings)
- How cost is being managed? Should be have GRN based average cost OR user controls cost (this will have impact on weighted price configuration)
- Do we have credit sales? (this will require customer club and customer ledgers)
- Do we have product supplier codes? These codes are used for ordering goods to suppliers (if required then configure other code for product)
- Do we issue purchase orders to the suppliers? Purchase orders are issued at the Head office or at shops or both?
- Do we use customer Orders (order & alteration)? For what purpose. It should be clarified that customer orders (for products not defined) have no effect on inventory).
- STR: Code or name, inside the cartons, discrepancy of items,

Action: Fill system configuration sheet

Product Configuration and Data Entry Plan

Standard or Assortment Version:

When we purchase we enter products on the basis of size and color? Do we require inventory on the basis of sizes or colors? While selling do we mention the particular size and color of the article?

Product Coding Structure:

Organization is currently using any coding structure? How many articles currently we have? What is the frequency of new articles addition? Do we using Alphabets in product codes?

Do we use pre-printed barcodes?

Line Item requirement should be discussed. Refer to “Appendix A” at end of this document for detailed discussion on line items.

Discussion of Product Attributes:

Which reports are required by the customer? (On the basis on reports requirement decide about attributes)

Data Entry of product definitions:

Master Data file availability, product cost price, product retail price, Plan for data entry, Plan for system commissioning and going Live

Printing of Barcode Stickers for existing inventory:

Availability of current inventory counts, printing and pasting of inventory barcodes,

Work Flow of new product definition:

Definition of products timings, replication considerations,

Work Flow of production or purchase:

When barcodes will be pasted,

Action: Fill system configuration sheet – configure product one time settings

Appedix A:

Line Item Definition and Its importance

In Candela Line item definition is very important. We should understand what role Line Item plays in the overall coding structure and product definition.

All products are defined under one of the line items. This means that system should have at least ONE line item.

Line item can be used to create departments in the system. For example, if a business sells grocery and cosmetics then two line items are defined. One is Grocery and other is Cosmetics. Within these line items the relevant products are defined.

Candela allows the users to manage products which have size and colors as in footwear and garments business. In this case Line items are used for size groupings. For example, if we are managing children and adult footwear then these should be managed as separate line items because children and adult footwear sizes range are different. Creating two line items “Children Footwear” & “Adult Footwear” creates two size groupings in the system. Then we can create relevant products under these line items.

There is a possibility that a business has some departments (like footwear and garments) which need to have sizes and colors while other departments (like grocery, pharmacy, bakery) which don’t have sizes and colors. In this case while creating each line item, we mention that it has sizes and colors OR not.

Candela can be integrated to “Lightwave” which is a comprehensive accounting system. The inventory information (in amount) is transferred to Lightwave in consolidated form or on the basis of Line items. So if we need to view the inventory amount separately for a group of products, in Lightwave, then we should define those products under separate line items.

Candela professional and enterprise version provide the facility to allow selected line items to be available on selected POS machines or Tills. For example we may want that the POS machine in cosmetic section should only be able to view and work on cosmetic products. This can only be done if cosmetic products are defined under a separate line item.

Also there is provision in the system to create product CODE template. With the help of these templates while defining new products their codes are automatically generated. These templates are also based on line item. So while defining a new product only those code templates are available which are defined for selected line items.

In case of retail chain store we have the provision to allow selected line items for selected shops. This helps in managing a retail chain network of different types or brands of shops within one organization. Each shop can be assigned line items which are then available on that shop. Therefore line item definition should also be done keeping this requirement in mind.

Candela has integrated customer club and discounts are attached to customer types. We have the possibility to setup different discount percentages, offered to customers, for different line items. So line items definition should take care of this requirement also. For example, in pharmacy we may just create one line item “Medicines”. But if we are managing customer club and we want to give special discount percentage to our loyalty club customers on “Injections” then we should define all injections under a separate line item.

At the time of purchase, user has the option to enter purchase in Packs instead of units. For this purpose purchase conversion factor is entered during product definition. This purchase conversion factor is only available for those products which are under a line item defined without size and color. This should be considered while defining line items. Sometimes we define few products which should not be included in regular reports. For example for managing credit voucher we create a product called “credit voucher”. For these products inventory has no meaning. So such products should be defined under a separate line item. Then these line items can be excluded while generating regular reports.

For deployment of Candela on Petrol pumps and CNG stations we can use candela to manage Gasoline and also there convenience stores. All Gasoline products should be in a separate line item. This line item is then marked in the system configuration and thus we get Meter Reading of all dispensers.

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By: Abdul Aziz