Artisan™ POS Version 4.8 for Mac & PC

DETAILED FEATURES LIST

➢ Some Features Require Additional Licensing (Indicated by Arrow Bullets)

- **Sales Entry:** Sales can be rung up easily using bar codes, or by typing the item code (SKU) on the keyboard. Item descriptions, prices, discounts, and tax rates are retrieved automatically. Any of these fields can be overridden once retrieved.
- **Item Lookup:** Lost the tag? Easily search for items using partial descriptions, UPC codes, partial item codes, or other searches.
- "**Power Search**" allows an extra level of searching. Filter by selecting criteria, then search within those results by various options. Advanced searches allow you to filter by just about any field. For example: Find all items received today that cost $25 from vendor X.
- "**Quick Pick**" or "**Touch-Screen Buttons**" lets you quickly ring up common items and categories by choosing from a button menu. Change the color of the button and add an optional image. Put unlimited items and categories on the Quick Pick to create a hierarchical structure. Use "Sticky" Quick-Pick for groups of items frequently purchased as a group such as Ticket Admissions, and Beverages. Great for touch screen, but also works on non-touch screens.
- **Quick-Discount Buttons:** Easily add discounts to your sales right on the Sales Screen. Add up to six buttons. Buttons can discount a single item or entire sale, and support decimal percentages.
- **Abbreviations** can be created for frequently used items that convert into real item codes.
- **Shortcut keys** let you quickly adjust quantities or perform other special functions.
- **Day End Closing** and **Shift Closing**: Post transactions for any time period, such as daily or every two days or whatever.
  - Close out all stations together in one large group or close out individually and count the cash for each drawer.
  - Print summary reports such as sales summary, sales by category, item, customer, vendor, etc., and transaction detail report.
  - **Cash Management with Cash Adds and Drops** with reminders/limits, audit trails, and security measures.
- **Shifts:** Have multiple shifts per register per day to allow for reconciliation of drawers per cashier per shift with separate subtotal reports per shift. Day end reports cover all shifts in the given time period such as 1 day.
- "**Waiting Sales**": When a customer delays at check-out, simply suspend their sale with a single keystroke while you ring up other customers, resuming waiting sales when customers are ready. Click the "Active Sales" button to cycle through all the active sales.
- **"Special Orders, Sales Orders, Layaways, & Custom Orders**": Full support for layaways & special orders. Configure minimum deposits (managers can override). Sales Screen lists customer's outstanding layaways & orders, for status & easy payment. Follow Special Orders from sale to purchasing, to receiving, customer notification, and delivery. **Sales Orders** only orders what is needed. **Custom Orders** allow taking of deposits on sales that require special finishing steps, sizing, or labor, or outsourced services.
- **Gift Cards (or Certificates):** Get pre-printed cards w/bar codes and/or magnetic stripes or use pre-printed paper forms. Track by number, issue date & amount, recipient, and more. Automatic or manual numbering. Also use cards as Customer IDs. Call for Specs.
- "**Smart Returns**": Simply scan the item being returned, and then scan the bar code on the receipt to select the specific sale, which selects the customer. If there is a discount on the item, the return will reflect the discounted amount. Search for sales when no receipt.
- "**Store Credit**": Optionally issue **Store Credit** to customers for returned merchandise. Remaining Balance & Expiration date print on credit slips and partially consumed credit slips. Open credits show at top of sales screen when a customer is selected.
- **Custom Forms**: Receipts, sales slips (invoices), price tags, and more can be customized to suit the theme of your store.
- **Add Sales Notes**: Insert extra notes a.k.a. "description-only lines", or blank lines anywhere in the invoice. Rearrange existing lines.
- **Pictures**: You can upload up to 6 images and 1 thumbnail. When you scan or enter items they are immediately displayed on the Sales and Purchase Order Screens. Click on the picture to enlarge and cycle through all the images. Store and display 1 Customer picture.
- **Shipping Address**: Optional shipping address defaults to customer's shipping address but can be changed per sale.
- **Item Count**: The total # of units on a sale is displayed on the Sale Screen and can be printed on receipts.
- **Recall & Reprint** completed sales. Recalled sales can be modified or voided at any time (with authorization).
- Put sales "**on hold**" to create quotes/estimates. Copy previous sales & modify as necessary to make a similar sale again.
- **Driver's License Capture**: Instantly capture customer information off a Driver's License by swiping or scanning 2D bar code.
- **Internal Use: In-House "Sales" & Donations** and other special inventory adjustments are categorized in reports for your accountant.
- View **customer purchase history** directly from Sales Screen.
- Option to **view total cost & profit margin** for current sale. This can be helpful when negotiating discounts.
- **Add new** customers, inventory items, inventory categories, and vendors directly from the Sales Screen, or open separate screens.
- **No limit** on the number of line items on a sale or different tender types (cash, check, etc.)
- **Custom payment types** for special transactions such as "Trade", or "Store Bucks".
- Optional **cash drawer** automatically opens at end of sale (for selected payment types) or **Quick-Open Drawer** at any time. For 64-bit Windows only, Artisan will support PartnerTech cash drawers that do not require a printer.
- Pole Displays ("**Customer Displays**") allow customer to see items as they are rung up, as well as total due and change. Support for VFD or LCD 10" or any 2nd monitor. After each sale, the display screen returns to the idle screen or displays a welcome message, even if Artisan is set to log out after each sale.
- **Price Check** feature allows you to look up prices without affecting or starting a sale. Eliminates a common excuse for voiding sales.
- **Dollar Donation feature** allows you to round up the total to the next dollar for a donation to your organization or charity.
- **Cash Rounding** ("Penny Rounding") for Canada and other countries that no longer use small-denomination coins.
- **Age Verification –** Visually or by scanning driver's license confirm that a customer is eligible to purchase age restricted products. Set restrictions per category. Set whether the confirmation is mandatory or just a reminder. Age may be set in customer record and when that customer is on a sale, their age is confirmed.
- **Detect Artisan Updates:** Artisan will detect if your station(s) need to upgrade to a new version of the program. Will also detect if the current station is on an older version, if your other stations are on a newer version, and ask to upgrade.

Register Close-Out & Sales Summary Reports

- **Special tools** make end of day processing easy and efficient.
  - **Cash Counter™** helps you quickly determine cash totals at end of day. Simply enter the number of each denomination of coin and bill. Currently supports US and Canadian denominations.
  - The **Tender Summary** screen shows expected payment totals. Easily adjust for over/underage.
  - **Day-End:** Automatically print or preview Day-End sales summary report w/optional detailed transaction journal.
  - **Per-Register Breakdown:** Full Day-End shows total for all registers with optional per-register breakdown.
  - **Audit:** Report lists voided sales (so you can account for all slip #s) and "no-sales" (drawer opened w/o sale).
  - **Fees:** Option to automatically deduct estimated credit card processing fees from bank deposit amounts.
- **Day-End & Month-End** reports can include breakdowns by inventory item, category, vendor, sales rep, customer, etc.
  - **Roll-up:** Sub-category numbers are rolled up into higher-level categories. Choose how many levels deep to show.
  - **Sales by Hour:** Optionally include a breakdown of sales by hour to determine optimal staff allocation.
- Optionally **export daily sales** and inventory summaries to accounting programs, such as QuickBooks®. Requires QuickBooks Feature Pack Add-On License

Inventory Control

- **Track Inventory** from end to end with purchase requests, purchase orders, receiving, sales, layaways, and returns. View the entire history of stock changes for any inventory item code. Inventory quantities always available in real-time.
- "**True Costing**": Calculates Cost of Goods Sold (COGS) by FIFO (First In, First Out).
- **Associate** each inventory item code (SKU) with an inventory category, a preferred supplier (vendor), and optionally a manufacturer.
- **Department/Category Structure:** Define your own multi-level category scheme, with up to 9 levels of sub-categories. Reports can summarize sales by category, with roll-ups to a specific level.

➢ **"Product Variants"** (a.k.a. Color/Size Grid) – Lets you easily manage collections of similar products. Multiple templates with up to 9 attributes (Size, Color, etc.) each. No limit on the number of choices per attribute. Choices appear in pop-up menus when base product code selected (or scanned) in Register. Any base product can use any template. Price, cost, etc. can be set individually for each variant, or can be set to automatically track changes in the base product. (Requires the Advanced Inventory Module.) When adding new attributes to variant templates, you can choose which values will be applied to already-existing variant item records, so barcode, QOH, and other details are preserved.

➢ Automatically **sync pictures** for other variant items. For example, a blue shirt with three different sizes will have the same image automatically uploaded for each item record instead of manually uploading the image yourself to each record.

➢ **"Inventory Kits"** – Define inventory items as collections of other items; component inventory quantities automatically updated. Optionally list components on customer invoice and/or packing slips. Automatically computes kit Cost & List Price as sum of component Costs & Retail Prices.

➢ **Multi-Vendor** (Multiple Suppliers per item)

- "**Work on the Fly**": Add or modify inventory items, categories, and vendors on the fly from any item selection screen.
- **No practical limit** on number of inventory items, categories, vendors, or manufacturer/publishers.
- Full **alphanumeric** codes for inventory items, categories, and vendors (up to 25, 20, and 10 characters, respectively).
- **Numbering:** Choose new codes manually or let the program pick the next available number (or other style code) for you.
  - 9 automatic **item** coding schemes available. 2 vendor coding schemes (including Vendor Initials).
- **Inventory defaults** settings allow for quick entry of new inventory. Copy function lets you make similar records even faster.
- **Item Lookup:** Inventory retrieval by bar code, item code, description, category, or vendor enables fast and easy lookup.
- **Power Search** feature when searching for items on a sale or in item lists allows filtering of items by common fields or advanced filters allow filtering by almost any field. Then add a secondary search by another field such as description, and so on.
- Store **product pictures** to display from Sales or PO or while viewing an Item Record. Pictures appear as items are scanned/entered on a sale. Click on the image to open viewer to cycle through up to 6 images. Will later be used for online store in a future 4.x release.
- **Item Record Screen** lets you easily view and edit all the fields in the item record. Organized by tabs for easy access.
- **Case Quantities** let you order merchandise by the case (or box, roll, etc.) but sell individual pieces.
  - Piece cost is automatically computed from the case cost and case size (accurate to 3 decimal places).
- Place a **Pop-Up Note** on an inventory item, for up-sell or other reminders. Appears in Sales Screen & on POs when item is rung up.
- **Merchandise Tags:** Print merchandise labels with or without bar codes and/or graphics. Print labels when merchandise is received, for a single item, or groups of items matching certain patterns.
- **Built-In WYSIWG Label Designer (for advanced users)** allows complete customization of Item, Vendor, and Customer Labels, with or w/o bar codes. Drag & drop fields from any table or formula. Detailed formatting controls and suppression formulas.
- **Stock Shelf Location** field can be used to locate the storage bin or stock shelf for each stock item.
- Up to **9 custom fields** in each item record can be given any name you want on a per category basis. Use the Custom Fields tab or place up to 4 custom fields on the main tab of the Item Record Screen.
- **Multi-line memo** fields in item and vendor records let you keep notes for later reference or add more details to receipt.
- **Searchable Keywords** fields in item and vendor records give you another way to organize your inventory.
- **Inventory Summary Report** by item, category, vendor, or location, as of a specified date.
- **Physical Counting:** Full support for physical inventory counting using Laptops, Tablets, Handhelds, and Tally Sheets.
- **Tracking Options:** Turn inventory tracking on or off for individual items.
- **Out-Of-Stock Warnings:** Automatic Out-Of-Stock checks can warn you when you try to sell an item with zero quantity.
- **Early Out-of-Stock Warnings:** If an item is out of stock at one location but available at another, you can take that item from the other location if you have inventory tracking turned on.

Inventory Control (cont.)

- **Pending Stock Corrections:** Instead of "negative inventory", tracks sales of out-of-stock items for later resolution by manager to deduct from receiving entered later or as actual corrections for incorrect counts.
- **Item Status:** Mark items as Discontinued, Temporarily Unavailable, or Non-Stock, to force an extra confirmation before use.
  - **Discontinued** items can be hidden from search lists.

Barcodes

- **Efficient**: Increase speed and accuracy by use of inexpensive hand-held or fixed mount scanners.
  - **Most Models Supported**: Supports all popular keyboard-wedge and USB Keyboard Emulation.
  - **Beyond the Register**: Many *Artisan* program screens are optimized for entering items by scanning.
- **UPC**: You can use existing UPC codes (or other bar codes) if your merchandise comes with bar codes already on it.
  - Use Item Record's UPC field as an additional code, just scan this code into the field. (Bar codes are just a number; you still must enter the rest of the information such as description, price, etc. -- unless you import data first!)
  - Unlimited Alternate Codes per Item Record. Useful when alternate suppliers use different UPC codes.
- **Print your own bar code labels** (using automatically generated bar code numbers) for products without UPC codes.
  - Enter quantities to print, or automatically print as needed for quantities of merchandise received.
- **Print Labels**: Two types of ways to print labels:
  - Print individual labels, using specialized label printers (***recommended***).
  - Print full sheets of labels using a laser or ink jet printer.
- **Built-In WYSIWG Label Designer (for advanced users)** allows complete customization of Item, Vendor, and Customer Labels, with or w/o bar codes. Drag & drop fields from any table or formula. Detailed formatting controls and suppression formulas.

Sales Tax

- **Configure unlimited sales tax types**, each with its own tax rate (with up to 3 decimal places).
  - Options for jurisdictions with more advanced rules, such as minimum thresholds and rounding up, down or nearest.
  - Option to have price include sales tax. ("Real" sales price is back-computed by subtracting tax from visible price.)
  - Handles special cases for Canadian dual taxes and others.
- Each **inventory** category can be set to one of the tax types, to non-taxable, or to non-sales (non-sales income w/no tax).
  - By default, sub-categories inherit this setting from their parent categories.
- Mark specific customers as tax exempt or to use a specific tax type, or individually override tax type at point of sale.
- Tax amount computed by applying rate to subtotals for each tax type, avoiding round-off errors.
- Tax summaries in Day-End and Monthly Sales Reports include breakdown by tax type of total taxable sales amount, total tax-exempt amount, and total tax collected (for each month), with subtotals by tax exemption type and non-taxable category.
- Basic Destination-based Sales Tax (no online lookups yet).

Integrated Payment Processing

(Requires Secure Payment Processing Module, FREE with New Merchant Account)

- **Integrated**: Authorize payments (e.g., credit/debit cards) through *Artisan*. Requires purchase of an **EMV-Capable Credit Card Terminal**. Supported devices must be obtained from CerTek, Reseller, or Authorized Dealer.
- Support for **EMV, NFC (Apple Pay & Google Pay), Credit, Debit, PIN Debit, EBT, In-House and Processor based Gift Cards, Card-On-File, Voice Authorization, Signature Capture (Payment Logistics only), Smart Refunds (w/o card present)**
- Various supported devices include Ingenico Lane 3000, 5000, 7000, & 8000, PAX S300, from our Processing Partners.
- **Processing Gateways**: Integrated with **Datacap Systems, a processor agnostic solution via NETePay, DC Direct, and TranCloud.** Integrated with **Payment Logistics via their Paygistix Client software for Windows.**
- Processing Partners: **Chosen Payments, Payment Logistics, Evo Payments, Worldpay, and Global Payments. FREE** integration with a *new* merchant account without any additional service fees. All you pay for is hardware and competitive customary merchant processing rates/fees without any integration costs. Restrictions/qualifications apply. Call for details.
  OR Bring Your Own Processor via Datacap. Hardware, S/W License, Setup, and Monthly Fees Apply.
- **Secure**: *Artisan* version **4.X** is **compliant with PA-DSS** Credit Card Industry Standards.
  - Artisan POS with EMV Terminal does NOT see or "touch" sensitive card information and is therefore considered "Out of Scope". This makes your PCI compliancy check much easier.
  - All payment transactions logged in Artisan in a log file as well as part of the sale transaction with easy batch reconciliation.
- **Comprehensive:** Process **Voids**, **Returns**, and **Voice Authorizations** directly in Artisan. Manual entry for card-not-present cases.

➢ **Card On File Option:** Store card details on a secure server at your payment processing company for later reuse. Artisan only keeps a unique "token" locally, which can only be used through your own merchant account. Great for repeat billing On Account or for Layaways and Orders, or simply as a customer convenience. This feature can be restricted to specific staff as needed by providing them the proper authorization level (supervisor/manager/owner).

➢ Online Web Store Integration

- Currently works with **Shopify, Woo Commerce (Word Press), and BigCommerce**.
- Synchronize **Products, Categories, and Sales** on a schedule as frequently as every 15 minutes. Get shopping cart e-mail notices.
- Choose which Products and Categories are online and manage product prices, pictures, descriptions, etc., all from within Artisan and then easily publish to website.
- Store seven product pictures for use with an online store or display in Sales Screen or while viewing an Item Record.
- Save yourself the hassle of entering data twice, just enter data into Artisan once!
- Sales on your site are **transferred** from Online Store into *Artisan POS* for processing and record keeping.
- Artisan creates customer records for guest orders placed on your Internet Store. If there are any matching records, such as last name or email, Artisan will find them.
- If you only want to upload some of your online store-enabled items, you can exclude specific categories from the upload.
- Artisan prevents uploads from overwhelming your Internet Store by skipping uploads for smaller changes.
- Reserve an amount that you don't want uploaded to your Internet Store, which will be subtracted from the Internet Store's QOH.
- See our website at **certek.com** for example sites for each and many more details!

➢ Interface to QuickBooks Accounting

- **QuickBooks**: Optionally export Daily Sales, Inventory Summaries, Accounts Receivable, Accounts Payable, COGS, to accounting programs, such as QuickBooks®. Requires QuickBooks Feature Pack Add-On License.
  The QuickBooks ONLINE (QBO) version requires an add-on monthly service.
- **Flexible Control**: Configure Artisan to match your Chart of Accounts, with flexible control over level of detail.
- **Daily or In Batch**: Once configured, export at the touch of a button, automatically during Day-End Processing, or for any range of dates. Date ranges are saved in one easy file, but are broken down daily when imported.
- **Deposit Transactions:** Optionally Artisan can automatically enter deposit transactions, saving even more steps.
- **Vendor Invoices**: Reconcile received Purchase Orders with Invoices from your Vendor for accurate costing. Invoices are imported into QuickBooks as Bill Due. Specify shipping cost as a direct expense.

Consignment

- **Specify Individually**: Mark items as consignment items; specify consignee/consignor splits instead of price markup formulas or specify specific costs; specify splits at item or vendor level. Vendors can have a mix of consignment and owned items.
- **Consignor Payout Statements** show items sold and amount due to each vendor.
    - Run statements for one vendor, for all, for ranges, or select list.
    - Optionally include a list of remaining items in stock. Optionally list sold items by date sold or by customer.
    - Option to EMAIL statements directly from Artisan.
    - Formatted for window envelopes, or use option to automatically print mailing labels.
- Option to automatically export consignment statements to QuickBooks as Bills Due. Requires Artisan's QuickBooks Connector.
- **Consignment Items in Stock Report** searchable by item code, description, etc.
- **Consignment Share**: For each consignor, choose whether split is based on standard retail price or on actual sale price.
    - List either price, or both, on Consignment Payout Statement.
    - Optionally deduct estimated credit card processing fees and/or monthly space rental fee from consignor's split.
- **Consignment Fill-In Price Model**, ideal for craft malls, allows you to create generic consignment items (typically one per vendor) that automatically move you to the description and then price fields in the Sales Screen.

Customer Management

- **Customer Types/Price Levels** with Markdowns and Markups. Combine with Payment Pricing Rules to create **Cash Discounts and Dual Pricing.**
- **Drivers License:** Capture customer Name, Address, DOB, etc. by swiping Driver's License with a magnetic stripe or scanning 2D bar code. Supported in most, but not all states. Requires 2D bar code scanner.
- **Any Lookup Field**: Quick lookup of customers by first or last name, business name, street address, ID #, or just about any field. Save your favorite searches for quick lookups. Sound-alike option lets you find names even if you don't know the exact spelling. Power search and advanced searches let you filter by sales activity, address, or just about anything else.
- **Results Narrow as You Type**: Type only as many characters as needed to find customer in list.
- **ID Cards**:
  - Optionally use conforming bar-coded or mag-stripe ID cards to quickly identify customers.
  - Use multiple customer cards (with different IDs) for the same (family) Customer Record.
- **On the Fly**: Add or modify customer records on the fly from any customer selection screen.
- **No practical limit** on number of customers.
- **Purchase History**: Track customers' purchases and maintain sales data for many years.
- **Store Credits**: Track outstanding merchandise credit slips by customer.
- **History**: **View** customer purchase and payment history by totals or by individual transactions.
    - "YTD" (Year To Date) sales as well as total sales directly in Customer Record.
- **Edit/Add in Sales Screen**: View and edit detailed customer information from point of sale.
- **Pop-Up Note:** Tag special or problem customers with a Pop-Up Note that displays on the Sales Screen.
- **Notes:** Multi-line memo field lets you keep additional notes about customers. **9 *searchable* custom fields** for your own use.
- **Birthday field** and an Anniversary date. Per-customer shipping methods, account terms, and discounts.

Customer Management (cont.)

- **2 Relationships** keep track of **birthdays** and **email** for 2 extra people such as spouse, friend, family member, etc.
- **Pictures:** Store customer pictures for display from the Sales Screen or while viewing a Customer Record.
- **Customer Forms** for collecting or printing specific form data or certificate. Customizable forms based on information from the customer record not tied to a specific sale. Some of this data may be collected from a driver's license. E.g. Fireworks Release Form
- **Mailing List:** Create specialized customer mailing lists and labels. (See MAILING LIST MANAGEMENT.)
- Automatic Billing: Supports reoccurring transactions that you can process on a regular, consistent basis, such as monthly, semi-annual, annual, and other monthly intervals. Use for ongoing charges or installed payments. Useful for loyalty clubs.

➢ Loyalty Clubs

- ➢ **Unlimited Separate Clubs:** Create as many sets of criteria to track customer purchases for automatic rewards as you need. **Control:**
- ➢ You control which types of customers are included in each club, how "points" are earned (by amount purchased, number of items purchased, or number of sales), and when and how they are rewarded.
- ➢ **Rewards** can include automatically printed coupons and/or discounts or special pricing (by changing Customer Type).
- ➢ **Quickly Check Point Values:** View accumulated points from Customer Record More Info or Sales Screen Shift-F4.
- ➢ **Confirm ID Requirement:** When enabled, customers only get points when scanning or swiping their Customer ID or Loyalty Card.

Accounts Receivable / Accounts Payable

- **Basic Open Accounts**: Support for basic Open Accounts with aging report for occasional charges.
- ➢ **A/R Statements:** Full support for Open Accounts with aging. Monthly fees may apply.
- **Accounts Payable :** Enter Vendor's Invoices to reconcile with Received Purchase Orders. Manually enter into your accounting program or directly screens or printed reports/invoices or import into QuickBooks for easier

Multi-Tasking & Multiple Stations

(5 stations or more may require a true server computer)

- Multiple windows or screens allow you to have multiple tasks open at once including multiple Sales, POs, Item Lists, & more. This helps to reduce the total number of stations required. Determine which open screen is which when hovering over the screen name.
  - ➢ Connect multiple Registers, Back Office Stations, Sales Desks, and Office Computers (requires additional licenses)
    - ➢ Up to 99 stations **per** site can share data over a network.
    - ➢ Connect to data without using Windows File share, but through a more robust SQL database engine.
    - ➢ Artisan automatically re-connects to its data after a network failure.

➢ Cloud 2.0 (Remote Operation)

- ➢ **Remote Operation** - "Better than Live!" - Each location has its own data which is synchronized periodically in the cloud all day long, every 15 minutes or so. If Internet goes down (or unavailable), all stations remain active!
- ➢ Work remotely on an individual station (or site) without being connected to your live local network. For a separate site, each station connects to a master computer that stores the data and manages the synchronization.
- ➢ When you don't have an Internet connection, changes are queued until you do.
- ➢ Data is synchronized via our Cloud 2.0 service and technology. Monthly fees apply.
- ➢ Great for Sidewalk Sales, Wireless Laptops/Tablets, Offsite Inventory Location, Working from Home/Travel, Multi-Store

➢ Multi-Store

Affordable Monthly Fees Apply

- ➢ **Share Data LIVE**: Share the same data across multiple sites (stores, warehouses, or departments), directly connected locally or through "The Cloud".
- ➢ You can have *non-inventory* locations, for "virtual" locations like an Internet Store or a Sidewalk Sale.
- ➢ "Remote Operation" (sharing data even while disconnected) is coming soon, scheduled for 4.3.
- ➢ **Per-Site Settings**: Each site can have their own store name & address, default sales tax type, and selected other settings.
- ➢ **Per-Site Day-End**: Day-End closings are independent for each site and deposits can be made into separate checking accounts.
- ➢ **Combined or Individual Reports**: Sales/Inventory reports can show totals and/or breakdowns by site.
- ➢ Optional **Per-Location Purchasing & Receiving** with per-site reorder levels (or make them all the same).
  - ➢ Reorders, Special Orders, and other Purchase Requests are associated with their original locations.
  - ➢ Combine requests from all locations on a single PO and automatically distribute or redistribute as necessary.
- ➢ Option to transfer inventory immediately or create a pending transfer, both with a printed Transfer Manifest.

➢ Employee Time Clock

- ➢ Keep track of the times that your employees are working.
- ➢ Employees **clock** in and out using a simple keyboard function and their existing *Artisan* usernames and passwords.
- ➢ Managers can **view** In/Out Board showing each employee's status and most recent time in/out.
- ➢ Managers can view/edit/add/delete from list of all time clock entries for all employees.
- ➢ Report time **worked** in Employee Time Clock Detail by Date Range or summarize in Day-End and/or Month-End Report.
- ➢ Option to **round** time worked to nearest 15 minutes, or other number of minutes.

Import/Export

More powerful Import/Export features coming in a future release... but for now...

- Import Service: We can import a variety of data from various sources including other POS Systems and accounting programs. There is an hourly fee for this service, please call the sales team for details and to request a quote.
- Do It Yourself Imports: Import Items, Categories, Vendors, Customers, and Gift Card directly from Excel, Text, CSV, or DBF files.
- Export virtually any data through the record list feature and by the custom report tool and through the SQL server.

Item Pricing

- **Flexible Pricing:** Pricing can be driven from several points:
    - Set manually in each item record, or pick a specific price chart to use for that item, or
    - Inherit a pricing markup/down formula or price chart from the associated Category, Vendor, or Manufacturer record, or
    - Create special "Fill-In Price" items that prompt the clerk to fill in the price at the time of sale.
- **Flexible Discounts:** Set discount levels at the Category or individual Item record level, or use a Quantity Discount chart.
    - **Discount by Amount or Percent:** Items may be discounted by a percentage or by a fixed amount, specified by Item or Category, or by using a coupon.
    - **Coupons:** Coupons can discount by a fixed amount or by a percentage of the entire sale**.**
    - **Advanced Coupons:** Use coupons to trigger specific Pricing Schemes (BOGO/nFer or Price Charts).
        - Specify Per-Sale Coupon Limit and Per-Coupon Total Qty Break Limit (for each pricing scheme).
  - ➢ **BOGO** (Buy "m" Get "n" Free or at a special price) & "n-Fer" specials (Buy 3 for 9.99)
    - Set special price by (a) specific amount, (b) discount amount, or (c) discount percentage.
- **Overrides**: Price and discount overrides can be performed at the time of a sale. Discount individual items or the entire sale.
- **Sale Dates**: Schedule Sale Dates by date range for discounts at the register for Categories of items or Individual items.
- **Price by Vendor or** Category: Automatically update costs and prices for all items in a specific category or from a specific vendor. Each item can "Opt-In" or "Opt-Out".
- **Price Charts:** Price items by cost ranges or quantity ranges on the sale.
  - For each range specify markup formula, price, and/or discount.
  - Apply charts to individual items or to mix and match groups.
- **Price Levels:** Supports unlimited price levels, or "customer types," (e.g., Retail, Wholesale, and Frequent Buyer Club).
    - You pick the names for each customer type and assign one of these types to each customer.
    - For price levels 2-6 for each Item, set price manually or using percentage markdown from Retail or from another price level. Use overall default percentage or override per Category.
    - Price levels can show on sale as discounts or as alternate prices (with option to show the Retail Price, too).
    - Set default price level per site, so each location can have different prices.
    - Each Customer can have an additional individual percentage discount off of their price level.
    - Monthly sales reports include breakdown by Customer Type (gross sales & total markdown).
- **Sales Tax in Price**: Option to have price include sales tax.

Mailing List Management

- **Export:** Export customer information to other applications or print mailing labels directly from Artisan.
- **Print: Print** mailing labels on standard page printers with Avery-compatible labels, or on supported label printers.
- **Target specific customer profiles** using advanced search features. Select a list of customers by any or all of the following:
    - Customer type (e.g., Retail, Wholesale, etc., or Any).
    - Birthdays or anniversary date.
    - Purchase history for any range of dates, based on number of items, or average, max, or total purchase price.
        - Optionally narrow down to a specific item, category (including sub-categories), vendor or artist.
    - City, state/province, full or partial ZIP/postal code, or country.
    - Include or exclude customers based on Keywords found in the keyword list in the customer record.
    - The date the customer was added to your database.

Purchasing & Receiving

- **Purchase Requests**: Create Purchase Requests to remind you to reorder, or use reorder levels to create them automatically.
- **PO from Requests**: Combine all purchase requests for a vendor into a Purchase Order automatically and adjust as necessary.
- **PO Dates**: PO starting & cancellation dates help you to control seasonal inventory better.
- **Reorders**: Quickly and easily reorder items using the vendor's name or item code, with or without Purchase Requests.
- **PO screen** shows quantity already available (unreserved on-hand plus on-order) to help you decide how many to order.
- **Easy access** to full item details to make further decisions.
- **PO Discounts:** Discount individual line items or entire PO by percentage or specific amount.
- **Easy Receiving**: Receiving screen shows outstanding items. Enter actual received quantities or receive all items for a PO.
- **Receive by Scanning** allows your quickly receive items that already have barcodes and that are already in the item database.
- **Inventory Quantity Updates**: Received quantities automatically added to inventory.
- **Print Labels**: Automatically print merchandise labels for a whole receiving batch.
- **Vendor Invoices** allow you reconcile bills from your vendor with Purchase Orders and Received Merchandise. Include shipping costs and import into QuickBooks as Bills Due.
- **Receive Without PO**: You can also receive items without Purchase Orders, in a batch or from individual Item Records.
- **Item Costs**: Update product costs directly from Purchase Order & Receiving screens.
- **Large PO's**: Plenty of lines per Purchase Order. No practical limit on number of Purchase Orders
- **Retail Price Note** can easily display the retail price of items on the Sales Screen and invoices, which is useful to show dealers and resellers.
- **Add memos and vendor number** to purchase order. A built-in search scheme lets you search for the PO by vendor order number.
- **Specify account numbers** and PO terms per-site.

Merchandising Reports

- Incredibly **useful Merchandise Performance Report** that gives you detail or summary information.
- **Buy Smarter:** Powerful tools that help you buy smarter:
    - Inventory Turns, Gross Margin Return on Investment (GMROI), Initial and Maintained Markups
    - Average prices, On Order, Mark Downs, Beginning and Ending Inventory, Sales, Net Received, Gross Profit
- **Discriminate:** Filter on particular categories, vendors, items, and manufacturers.

Printing

- Completely **customizable** forms with the built-in Label, Report, and Form Designer for **advanced users**. Forms can be configured to your specific needs: sales slips (invoices), purchase orders, receipts, order forms, customer forms, labels, reports and statements. Forms can be emailed, printed directly, opened on screen, or saved or exported to PDF, Excel, and other formats. Hire CerTek to customize for you at reasonable hourly rates! Customizations are **not** included in support plans. ***Report* Designer Requires Deluxe.**
- **Six Printers:** Handles up to six printers per station. Associate specific printers with particular reports or receipts.
- **Receipt Printing:** Configurable Sales Slip Styles give you comprehensive control over the number and styles of sales slips to print, either by automatic rules or by presenting a menu at the Point of Sale.
- **Multiple Copies:** Can be set to print an extra receipt for signature when credit card payment selected or print on different forms and/or printers based on payment type (e.g., On Account), customer type (e.g., Wholesale) or other criteria.
- **Gift Receipts:** Print receipts that don't have the prices and hides coupons, merchandise returns, and note lines.
- Use an **auto**-cutter between copies, or have the program pause while you tear off each copy.
- Quick **Reprint** function automatically recalls and reprints last receipt.
- **Standard forms** for purchase orders and statements are laid out to work with single or double left window envelopes.
- **Mailing lists** and customer & vendor labels are easy to create and print.
- **Packing slips** list items purchased without payment information.
- **Order fulfillment worksheets** are for in-house purposes to help put orders together, with fields like "QTY needed," "date ordered," and more.
- Most forms and reports can be previewed on the screen before printing.
- Standard forms for 40 column receipts for small receipt printers or create custom forms as needed.
- Supports most USB sheet printers and popular receipt and label printers. See "System Requirements & Supported Devices" below.

LABEL PRINTERS (Recommended instead of sheets of labels)

- **Rolls of Labels**: Supports selected bar code label printers. Avoids wasting partly used label sheets.
    - You can even have two label printers (on same computer) loaded with different kinds of labels.
- **Special Tags:** Print merchandise item labels in a variety of shapes, sizes, layouts, & colors, ***including jewelry & clothing tags***.
    - Optionally include "cost codes", printing costs in code (letters), so salesperson can have a basis for negotiation.

Reporting

- *Artisan* **provides five** options for reports, which can all be viewed or printed from within *Artisan*:
    1. Use one of the many built-in native reports, many of which have numerous options.
    2. Get free reports from our library of custom reports that we made for other customers. Requires 60-day or monthly support. View reports from the “custom” menu inside each of the various report categories.
    3. You can contract CerTek to create a custom report for you or you can hire a third party. You can even share reports with your colleagues who also use Artisan.
    - 4. Create your own custom reports using the built-in Report Designer (for advanced users, **requires Deluxe Feature Pack**.)
    - 5. Copy an existing report to tweak it to suit your needs (for advanced users, **requires Deluxe Feature Pack**.)
- Real-time data with unlimited tracking history, item history reports and product list reports.
    - Many reports have options to subtotal and/or group by vendor, category, etc, and to limit to specific groups.
        - Sub-category numbers are rolled up into higher-level categories. You pick how many levels deep to show.
        - “Category Tree” option for summarize & group by.
            - Use “Super-Group” in addition to summarize & group by for a 3rd level.
- Inventory Change Summary shows qty sold, received & adjusted for each item in a given time period.
- **Inventory Summary** shows on-hand inventory asset totals, with optional subtotals.
- **Inventory Adjustment** Detail lists or summarizes shrinkage, breakage & other special adjustments to inventory counts.
- Print **Best or Worst Sellers** Report by vendor, category, item, or customer.
- **List outstanding** gift certificates, layaways, special orders, store credits, on-hold sales/orders, voided sales, and more.
- **List** open vs. closed **purchase orders** and outstanding or past receiving.
- Activity Reports for Inventory & Customer Records, and more.

Auditing

- For changes that are made to inventory and customer records and many other places, you can get a complete audit trail of who changed what, when, and where. Advanced security algorithms prevent unauthorized tampering.
    - **Configurable Password Strength:** – require Strong passwords for some or all users (or none).

Security

- Assign **passwords** and security levels to each user. Advanced security algorithms prevent unauthorized tampering.
    - **Configurable Password Strength:** – require Strong passwords for some or all users (or none).
    - **Password Aging**: Passwords can be set to expire after a set number of days. They must vary from users last 4 passwords.
    - **Lockouts:** After 6 consecutive failed password attempts, the user is locked out for 30 minutes. Administrator may override.
- Assign security levels to sensitive tasks or use Quick Security Settings to use a standard profile (Minimum, Medium, High).
- Ability to **hide costs** from employees.

Sales Commissions

- **Optionally** track sales commissions with a separate sales representative field from the sales clerk and from the logged in user. Include or exclude specific product categories. Customized commission reports are available at an hourly rate.
- Each **Rep** can be set up with a different commission percentage, based on either Net Sales (after discounts) or Gross Profit.
- **Commission** totals included in “Month-End” Sales by Sales Rep report section.

Training & Support

- Ever expanding self guided training articles and videos are available free of charge.
- Training/Support is available from your Authorized Dealer or Direct from CerTek. Start off with web training from one of our top-notch specialists. We bring the training session onto your computer via the Internet, live, while you talk over the phone. Very reasonable rates! Or if you prefer, teach yourself through guided tutorials, manuals, and knowledge base articles.
- **Automated tutorials** step through common tasks.
- **Training mode** lets you practice with sample data. Copy your own real data to sample data to teach your staff & practice at any time.

Customizations:

- **Numerous program options** allow you to tailor *Artisan* to meet your individual needs.
    - Control various aspects of program behavior and screen layouts. Select default search options for different tasks.
    - Control which fields appear in screen lists, control column widths and position. Drag columns to another position.
- Most **printed receipts**, **forms, labels, and statements** can be completely customized. Even **reports** can be customized by copying an existing report and tweaking it to suit your needs. For advanced users. See Printing above.
- Add **return policies** & other messages right from the *Artisan* configuration screens.

Backups & Miscellaneous

- Integrated **data** backup and restore functions. Optional automatic backup reminder daily, weekly, bi-weekly, or monthly.
  - Backup data directly to USB flash disks, local hard drives, network drives, or to cloud services such as ***DropBox***.
  - Schedule automatic backups to run during the night – use in conjunction with online services such as ***DropBox*** for off-site backups.
- Supports **both** US and non-US addresses and phone numbers.
- “Go” menu & “Reports” menu allow quick navigation to key areas of the program.
- Bulk Change feature allows you to update key fields quickly such as item discounts, prices, reorder levels, & more. Update all records or use the power and advance search filters to exactly select which items get updated.
- View a breakdown of category and vendor sales and receiving information right on the **category or vendor activity tab.**
- **Percentages Include Decimal Fractions:** All percentages can support decimal fractions, such as discounts, markdowns, sale percent, cost percent, consignment splits, etc.
- **Discount Entire Sale by Specific Monetary or Percentage Amount:** Input a decimal or percentage discount that applies to the entire sale.

Data Conversion & Other Services

- Get started more quickly by converting your customer and/or inventory data from your old program(s). You, Your Dealer, or CerTek can perform various data import functions.
  - If you prefer, convert your data yourself, using the Import features of Artisan. See Import/Export above.
- We can also handle Data Entry for you. Call for details.
- Logo conversion for use on Receipt & Label Printers.

System Specifications

- Artisan will run on **Macs** or **Windows PCs**. You can mix and match, and have, for example, a PC with touch screen at the sales counter and a Mac in the back office, or vice versa. Artisan can also run on laptops and tablets running full Windows or Mac OS X, but currently **<u>not</u>** on iPads or Android tablets. Be wary of tablets in general since Artisan needs a keyboard for some functions.
- Artisan 4.X stores your company data on an SQL database server called PostgreSQL (pronounced "Post-gress-QL"), which can run on one of the register computers, or a dedicated “Server”. PostgreSQL is a powerful transaction-oriented SQL database that runs on Windows, Mac, or in "The Cloud". PostgreSQL installation on Mac, PC, or Cloud is included with your Artisan purchase. **Cloud installations are subject to monthly billing.**
- Although Artisan will safely run on a wireless network, it is not recommended. **We recommend a WIRED network when possible.** WiFi is slower and less secure but is a good option for specific tasks such as inventory counting using a laptop and a scanner.

Optional Features -
(Features you can turn off or purchase as an add-on.)

Latest Features Might Not Be On This List - View in Artisan: "Program Options" - > "Optional Features"

Gift Certificates	Included in Base
House Charges (Basic A/R)	Included in Base
Vendor Invoices	Included in Base
Consignment	Included in Base
Custom Orders	Included in Base
Credit Card Processing	Secure Payment Processing Module (SPP)
QuickBooks Accounting	QuickBooks Accounting Connector
Employee Time Clock (ETC)	Deluxe Feature Pack
Shift Closing (multiple shifts)	Deluxe Feature Pack
Loyalty Clubs	Deluxe Feature Pack
Tracked (numbered) Coupons	Deluxe Feature Pack
Gift Registry	Deluxe Feature Pack
Age Verification	Deluxe Feature Pack
Customer Forms	Deluxe Feature Pack
Report Designer	Deluxe Feature Pack
Advanced Sales Exports	Deluxe Feature Pack
Remote Operation	Deluxe Feature Pack +Additional License +monthly fee
Inventory Location Tracking	Advanced Inventory Module or Multi-Store
Multi-Vendor (per item)	Advanced Inventory Module
Inventory Kits	Advanced Inventory Module
Product Variants (size/color)	Advanced Inventory Module
Internet Store Interface	Internet Store Interface (ISI)
External Order Imports	Internet Store Interface (ISI)
Credit Cards On File	Advanced Payment Processing Module
Tips (Gratuities)	Advanced Payment Processing Module
EBT Payment Processing	Advanced Payment Processing Module
BOGO & “n-Fers” Pricing	Advanced Pricing Module
Pricing Charts	Advanced Pricing Module
Contract Pricing	Advanced Pricing Module
Accounts Receivable (Full A/R)	Advanced Billing Module
Third-Party Billing	Advanced Billing Module
Buy from Customer	Buy-From-Customer Module
Automatic Billing	Advanced Billing Module
Serial Numbers (Future Release)	Serial Number Feature Pack
Automatic Billing (Future Release)	Advanced Billing Module
Payer Lookup Table (Future Release)	Advanced Billing Module
Extended Tender Info (Future Release)	Advanced Billing Module

System Requirements & Supported Devices
Java Version 8 is required

Windows PC

- Supported Operating Systems:
  - **Windows 10 PRO / IOT 64-Bit**

- Recommended Computer Specifications:

WINDOWS PC (For Primary Server Station)
- Windows 10 Professional 64-Bit
- Intel Six-Core i5 or Eight-Core i7
- 16 -32 GB RAM
- 8 USB Ports
- Gigabit LAN
- 250GB (or better) Solid State Drive (SSD)
- 250GB 2nd SSD in a RAID

WINDOWS PC (For Secondary Stations)
- Windows 10 Professional 64-Bit
- Intel Six-Core i5
- 8 GB RAM
- 8 USB Ports
- Gigabit LAN
- 250 GB (or better) SSD

WINDOWS Tablet (For Physical Inventory)
(Example: Microsoft Surface GO 2)
- Windows 10 64-Bit
- 8th Gen Intel® Core m3 Processor
- 8 GB RAM
- 1 USB Ports
- WIFI & Bluetooth
- Solid-state drive (SSD): 128GB

- **Receipt Printers:** Most USB receipt printers, including many models from Star, Epson, Samsung, Partner-Tech, Ithaca are supported when installed with manufacturer's device driver."Generic Text" drivers are not supported.
- **Label printers: We recommend the TSC TTP-247.** Also supported: Cognitive Advantage DLX, Select TSC, Zebra & Eltron models. Requires manufacturer's device driver.
- **Pole Displays:** Partner Tech & Logic Controls; other makes & models require custom control strings.
- **2nd Monitor / LCD Customer Facing Display**

MAC OS

- Supported Operating Systems:
  - **Mac OS X 10.11 (El Capitan) or Later**
  - Mac OS 11 (Big Sur) on Intel or M1

- Recommended Minimum Computer Specifications:

APPLE MAC
- 2.7GHz quad-core Intel Core i5
- 8GB memory
- 500GB hard drive

For the **main computer** where your data is stored:
Add a Time Machine backup drive.

POS Devices for Mac

Macs require more specific hardware to work properly, because Mac drivers are not available for many devices. Call us if you have existing hardware not on the list of supported devices below, to see how hard it would be to support and how much that would cost. We strongly recommend new hardware with drivers and firmware designed to work on Mac OS X!

- **Receipt Printer: Star TSP 143 USB / Epson TM-T20**
- **Label Printer: TSC TTP-247**
- **2nd Monitor / LCD Customer Facing Display**

Other Devices for Both Mac & PC

- **Cash Drawers:** Any electronic drawer that connects through your receipt printer's "RJ" connector. Must match printer type.
- **Bar Code Scanners:** Most USB Keyboard Emulation 1-D or 2-D Bar Code Scanners. (2-D required for Driver's License scanning.)
- **Card Readers (MSRs):** Most 2 or 3-Track USB Keyboard Emulation Magnetic-Stripe Readers. For Gift Cards / Legacy features.
- To read **Driver's Licenses**, use 2-D Scanner. Certified on various **Zebra Scanners with 2D technology.** Other make/models are not tested. Some older licenses require an MSR instead, but those are being phased out.
- **Data Collection on Tablets & HANDHELDS** like the Zebra **TC26,** other Android & iOS devices, and Import from File.
- **Sheet Printers (for Reports):** Most sheet printers are supported but require the real printer driver to be installed.
- **Scales:** Random Weight a.k.a. Deli Scales (Like at the meat counter.) Barcode is printed from a standalone scale.
- **Scales:** Weight at the Register. Scan and place item on scale, press key, quantity is updated in the sales screen.
- **EMV** Payment Devices for Payment Processing (Some, but not all, solutions are supported on a Mac.)

NOTES