



iVend for Microsoft Dynamics 365 Business Central

New York | Mexico | London | Dublin | Dubai | New Delhi | Sydney

Overview

End to End Retail Management Solution

Future safe integration utilizing AL programming language and interoperable iVend APIs

Highly scalable

- From single store to hundreds of stores across geographies

Ease of deployment, use and maintenance

Low Cost of Ownership

A leading global software player for forward looking retailers . . .

CitiXsys is a leading software provider focused specifically on the retail sector

Based in New York, CitiXsys has 11 sales and delivery centers globally

Over the last 7 years CitiXsys has grown significantly, with over 1500 customers spread across 85 countries

iVend – CitiXsys' flagship product, provides a comprehensive end-to-end solution for retailers: inventory management, loyalty programs, ecommerce, business intelligence, mobility solutions, digital passes /coupons and cloud-based solutions and Point-of-Sale (POS)

Markets We Serve



Home & Electronics



Apparel



Footwear



Optical



Sporting Goods



Book Stores



Specialty



Grocery



Beer & Wine

Retail Challenges We Address

- ✓ Omnichannel Integration
- ✓ Consistent Consumer Experiences
- ✓ Inventory & Fulfillment Optimization
- ✓ Customer Management & Loyalty Programs
- ✓ Price & Promotion Management
- ✓ Business Growth & Expansion
- ✓ Integration of Standard Business Management Applications

Global Blue Chip Customer Base Across All Subsectors

Select Customers



Alliance Partners



Solution Certifications





POS



Reporting and
Analytics



Mobile POS
Loyalty



eCommerce



Digital Passes



An Omnichannel Journey

You receive an email offer on a pair of jeans

Promotion received



At home, you browse for a pair of jeans you like and purchase online

24x7 anywhere, anytime shopping



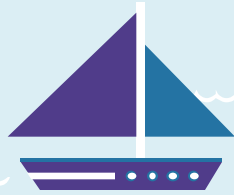
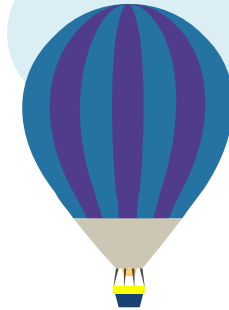
Once you arrive, the store associate recognises you and brings the jeans

Personalised shopping experience



You lookup the store nearby and reserve them for a pick-up

Check store location on mobile



Fashion Clothing

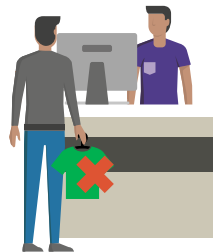


You see a shirt you like, ask for it to be delivered into fitting room

Assisted sales through mobile POS

The store doesn't have size, offers it to deliver it at your home

Single view of inventory



Shirt delivered at Your Home



Omnichannel Capabilities in iVend Retail

iVend eCommerce

- Buy online pick up at store
- Integrated with Loyalty, Promotions, Gift Cards and Coupons
- Mobile responsive interface
- Seamless master data and transaction integration with iVend Enterprise

iVend Loyalty and Passes

- Setup multiple loyalty plans – across enterprise or store specific
- Flexible point accumulation and redemption plans
- Passes are geo-fenced digital gift cards, coupons and Loyalty cards

iVend Promotions

- Comprehensive promotions engine integrated with Terminal POS, eCommerce and Mobile POS
- Ability to configure Buy Some Get Some and Fixed Priced promotions
- Promotions can be across retail landscape or can be store specific

iVend Mobile POS

- Operates in online and offline mode
- Can be used in-store or in the field
- Can be used as a fulfillment device for deliveries

Single Stock Pool

- Single view of inventory across retail landscape
- Online shoppers can view inventory status before selecting pick up store
- Avoid merchandise stagnancy and stock-outs

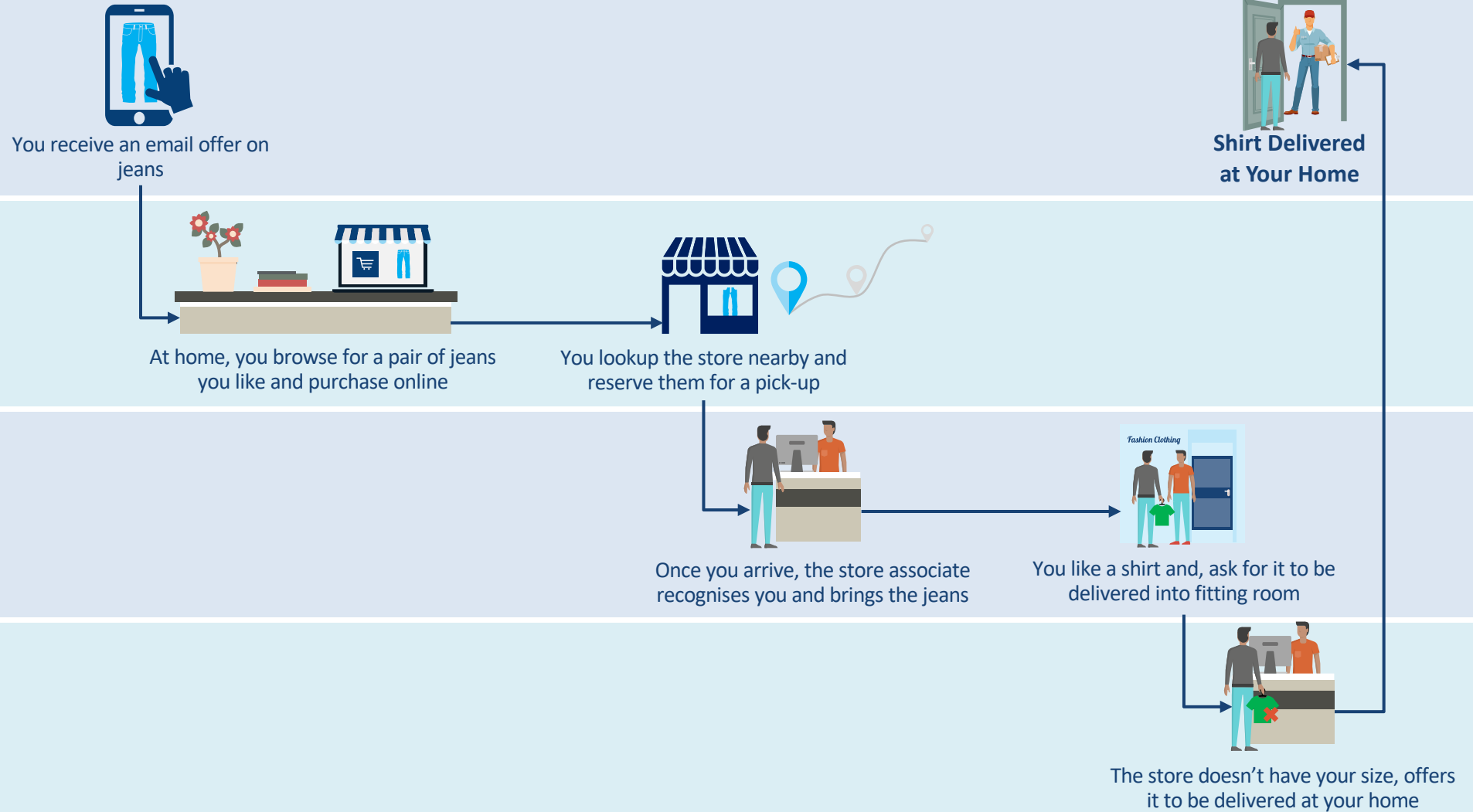
Omnichannel Journey with iVend Retail

iVend Promotions,
Loyalty and Digital
Passes

iVend eCommerce

iVend Terminal and
Mobile POS

Single Stock Pool



iVend Enterprise



iVend Enterprise

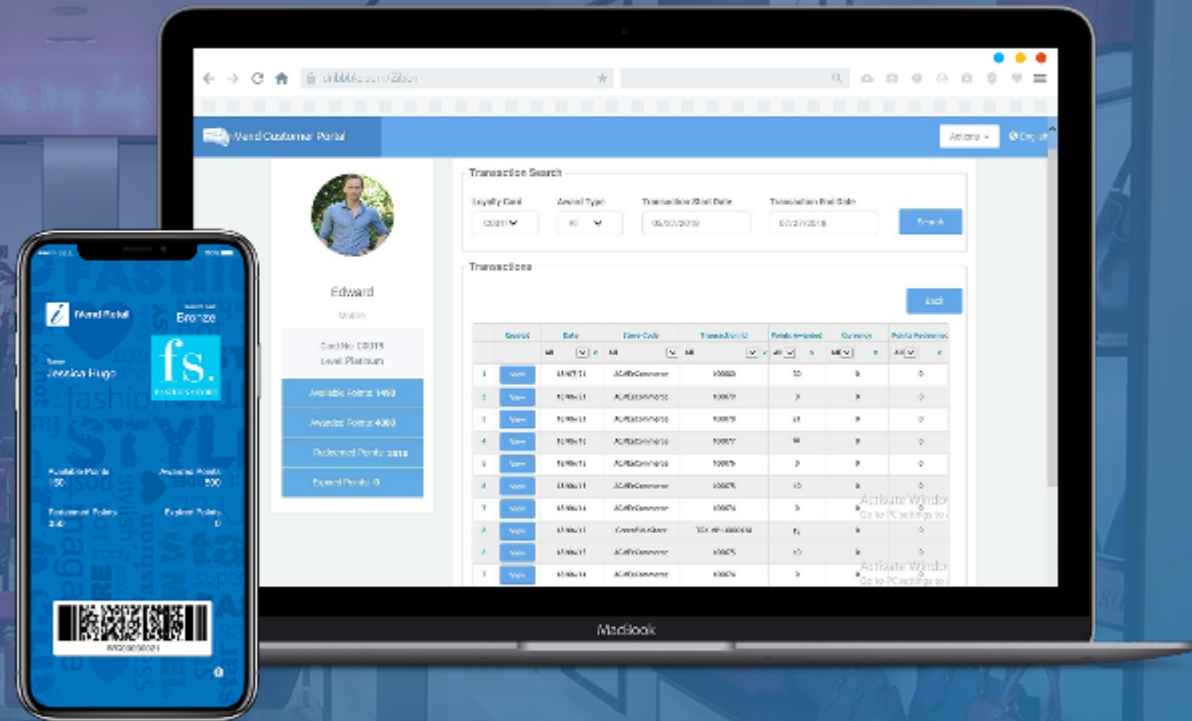
How does it help?

- Optimized for omnichannel retail so customer service is provided in real time from a truly single stock pool
- Optimizes inventory availability and therefore sales potential, and provides the integration necessary for the customer experience across all channels
- Centralized management of promotions, loyalty schemes, price lists allows to respond quickly to changing market conditions
- Facilitates expansion into single brand franchisee operations

What does it do?

- Manages the operation of all the iVend Retail modules
- Collates and manages data on all the business transactions
- Enables a single view of inventory and customers across the business
- Provides a range of inventory management functionality, most notably forecasting for continuity items and replenishment
- Gives extensive management insight into all aspects of the business
- Allows creation of multiple subsidiaries to have consolidated view of Sales, Collections and Stock status across the subsidiary network
- Supports multiple deployment options on premises or on the Cloud
- Available in 16 languages
- Extensibility toolkit makes it easier to add customizations where unique functionality is needed

iVend Loyalty



iVend Loyalty

How does it help?

- Win back churned customers and increase customer lifetime value
- Builds traffic, conversion rates, transaction size and brand advocates
- Makes retailer's brand the destination of choice at the start of the customer's shopping experience or trip
- Build meaningful customer segments and to develop programs and services that maximize long term loyalty

What does it do?

- Multiple loyalty plans can be set up either for the entire enterprise or specifically for individual stores
- Multiple loyalty plans can assign points or currency based on customer purchases
- Ability to define membership of group schemes, e.g. for all family members or to support a particular school or charity
- Individual plans can relate to specific products or promotions or exclude products (for example clearance items) or promotions
- Loyalty Referral Programs can be defined to provide referral bonus points whenever an existing loyalty customer facilitates creation of a new loyalty customer
- Product catalogue specifically for loyalty customers can be created on iVend eCommerce

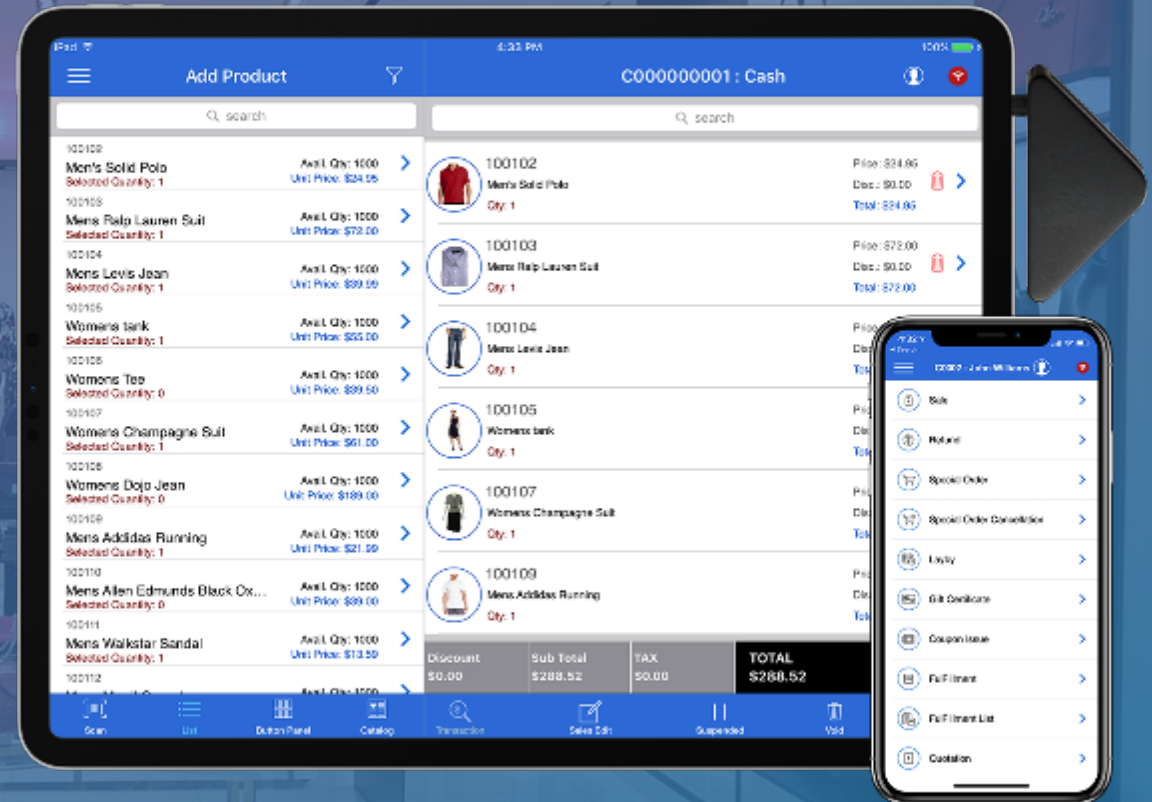
iVend Mobile



AVAILABLE ON THE
App Store



ANDROID APP ON
Google play



iVend Mobile POS

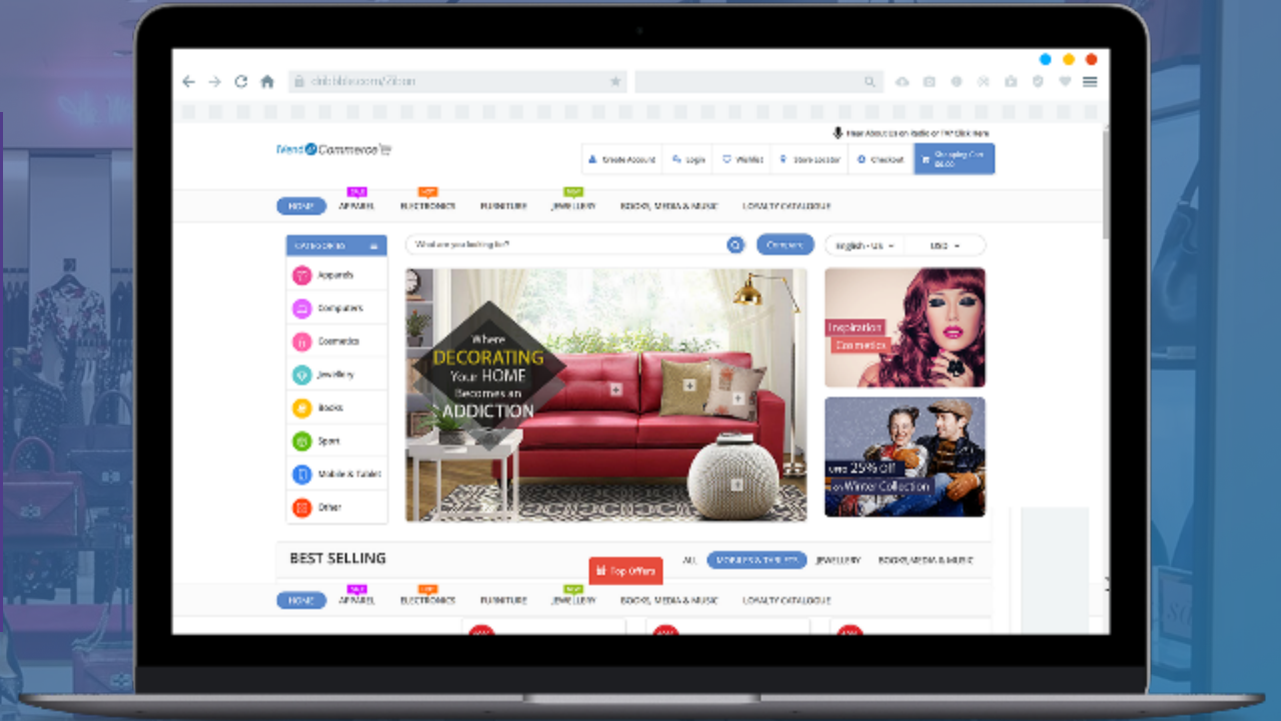
How does it help?

- Faster checkout for customers
- Better customer service with guidance on products, availability and past customer purchases
- Ability to add extra checkouts immediately when store volumes increase or lines lengthen
- Improved store efficiency - the same hardware can be used to support other store functions when customer traffic is quieter
- Increased sales as it is easier to open temporary pop up stores or provide service at off-site events

What does it do?

- Available from the Apple App Store or Google Play and gets installed on the mobile device like any other App
- Works online over Wi-Fi or a 3G/4G connection. Also works in offline mode when there is no network connectivity and synchronizes with iVend Enterprise when network connectivity is available
- Full support for special pricing, promotions, Gift Cards, Loyalty and coupon based discounts.
- Synchronization can be scheduled manually or automatically at set times.
- 12 languages as default, others can be added.
- Strong security and remote support
- Numerous peripherals supported
- Inbuilt dashboards and reports on mobile POS including transaction by value, count, tender details, X-tape Report, etc.

iVend eCommerce



iVend eCommerce

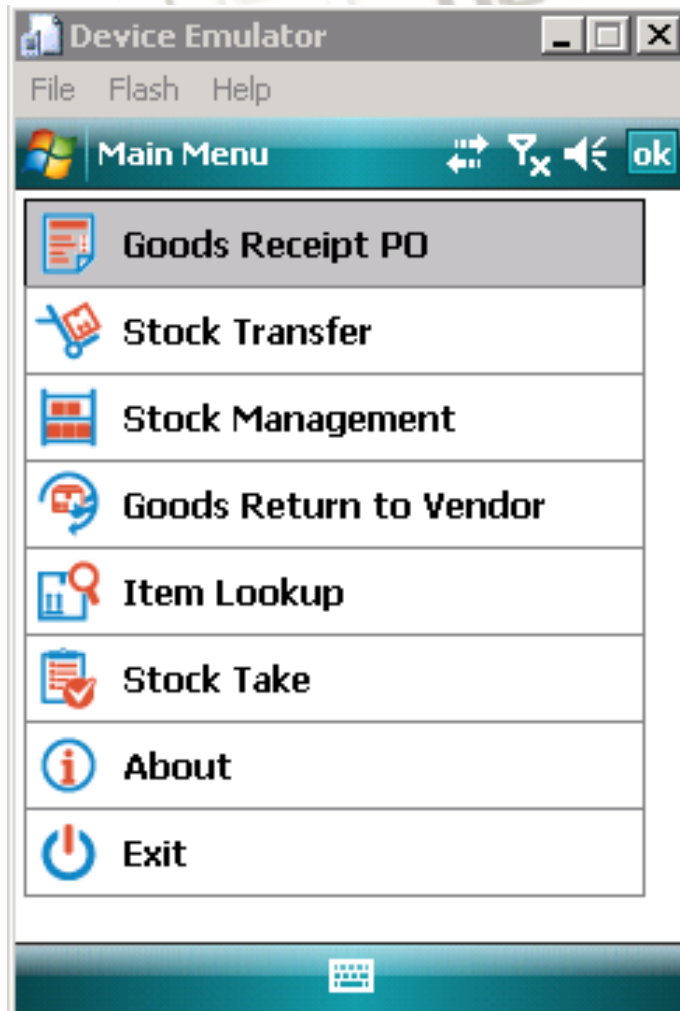
How does it help?

- Completely integrated solution for omnichannel retailers, providing a consistent customer experience across all channels
- Operates off a common stock pool maximizing stock productivity, product availability to the consumer, sales and customer satisfaction
- Product features designed to maximize the impact of search engine optimization
- Allows retailers to fulfill individual orders from the optimum location according to retailer defined rules improving profitability and customer service

What does it do?

- Configured as a store in iVend Enterprise to enhance master data management and transaction integrations.
- Seamless integration with iVend Loyalty, iVend Passes, promotions, gift cards and coupons.
- Manage product/category/department/brand's name and description in multi-language
- Can be configured to setup multiple store fronts with single backend administration panel eg. apparel.retail.com or footwear.retail.com
- Variety of sales enhancing techniques, such, customers who bought this also bought this, related products display, product X requires product Y, recently viewed products, etc. can be configured
- Shopping carts can persist over a defined number of multiple site visits
- Downloadable products supported with instructions on how to download
- PCI compliant

Stock Management with Handheld Devices



Windows Mobile OR Android based handheld devices to manage store inventory

Transaction types:

Good Receipt PO

Stock Transfer

- Shipment

- Receipt

Item Lookup

Stock Management

- Goods Issue

- Goods Receipt

Goods Return to Vendor

Stock Take

Reporting Capabilities



iVend Report Designer



iVend Dashboards



Query Builder – for ad hoc reporting



iVend Web Viewer for viewing dashboards and reports in a web browser on desktop or mobile devices



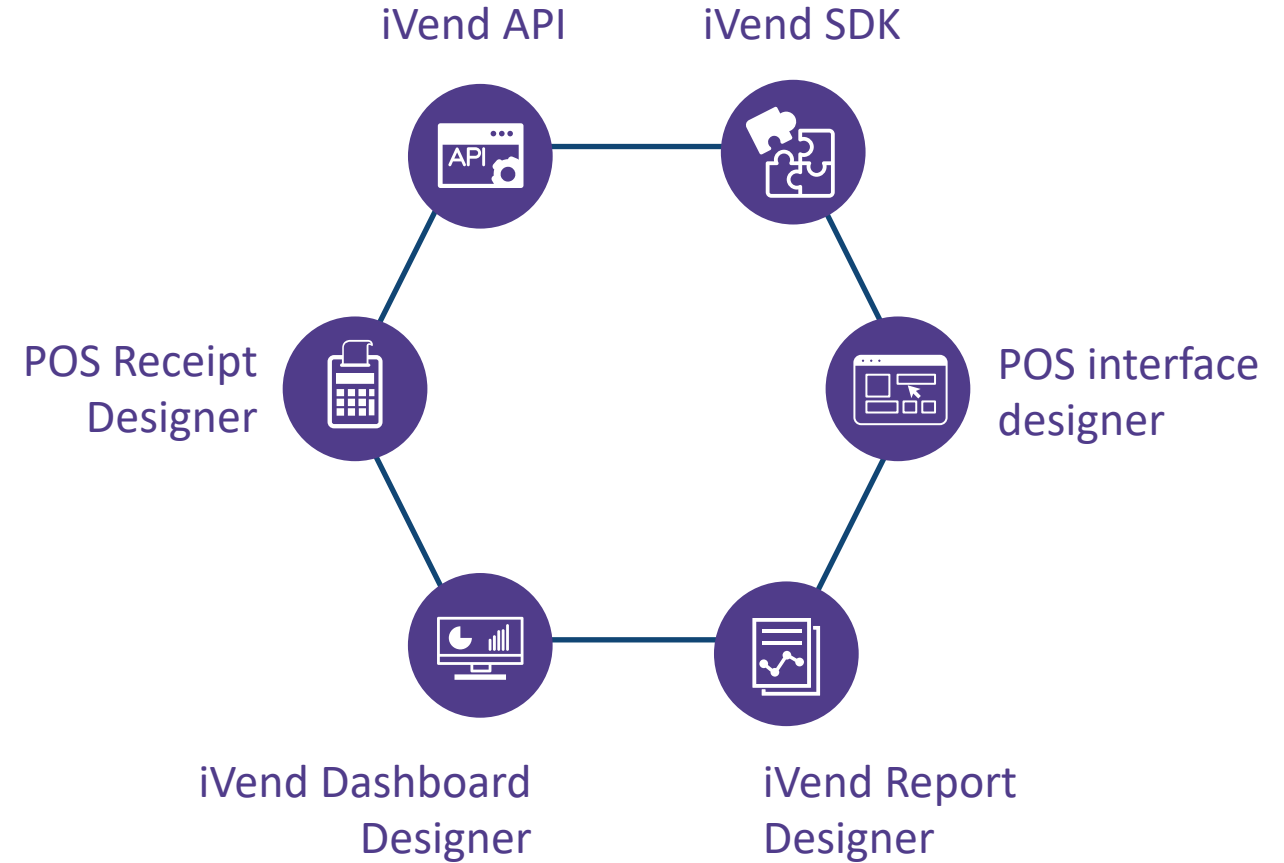
Report scheduler to send canned reports on a pre defined frequency



iVend Extensibility

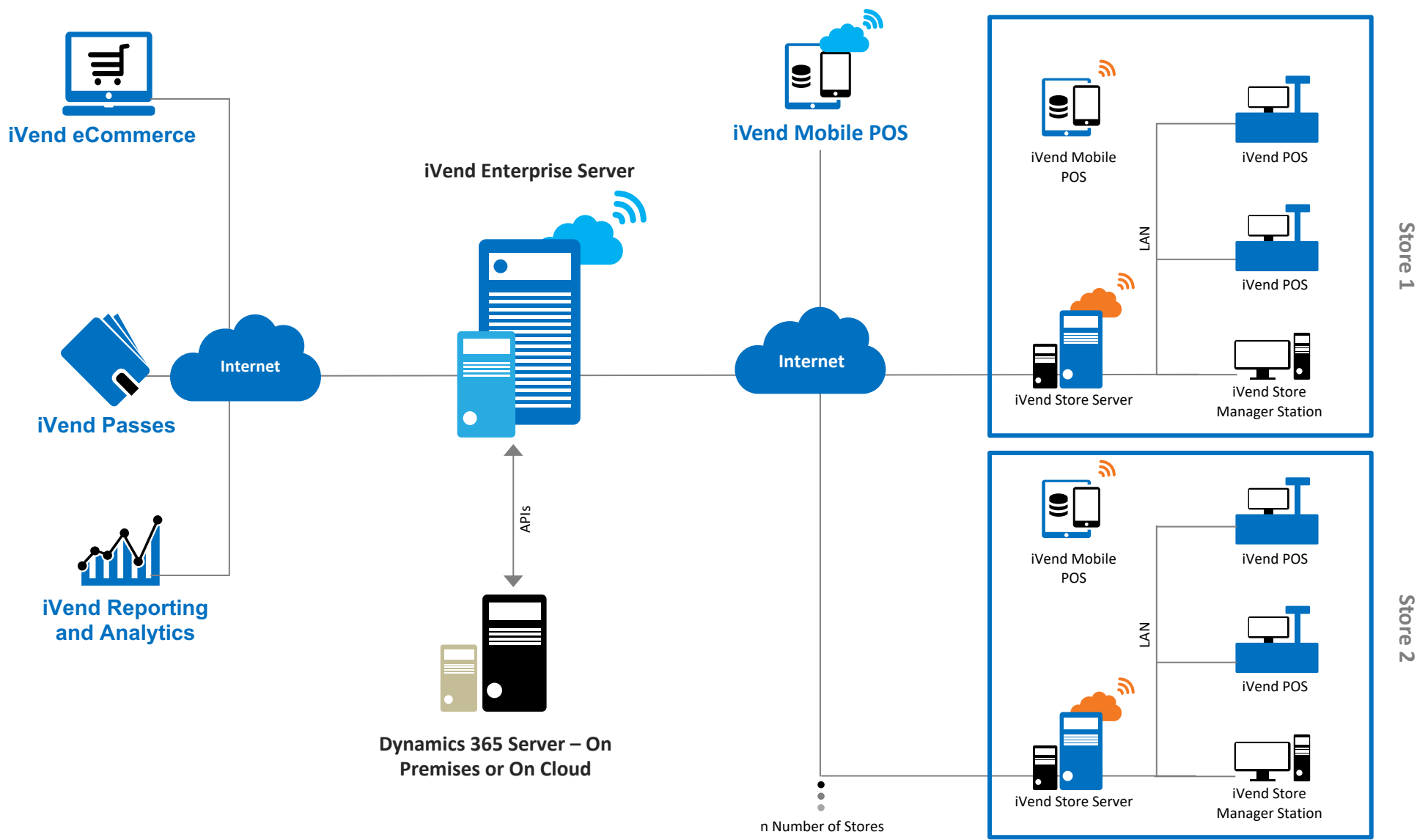


iVend Retail Extensibility facilitates the partners to enhance and extend the functionality of iVend Retail application as per new business requirements in accordance with growing business needs of retailers



iVend Retail + Microsoft Dynamics 365 Business Central

Deployment Landscape



iVend Retail + Microsoft Dynamics 365 Business Central

Integration Benefits

iVend Retail management suite integrated with Microsoft Dynamics 365 Business Central can help retailers **adopt omnichannel capabilities with ease**

Seamless integration improves end-to-end retail management with minimal manual intervention and **streamlined retail functioning**

iVend Retail integrates with Microsoft Dynamics 365 Business Central using **AL programming language** and iVend Retail's interoperable APIs

Entire landscape designed to utilize **best practices** inbuilt in Microsoft Dynamics 365 Business Central AND extend them via iVend Retail to retailer's entire retail business



iVend Retail + Microsoft Dynamics 365 Business Central

Integration Benefits

Enables maximizing sales potential by implementing **fully integrated sales growth programs** across all sales channels

Executives and managers get better focus on the business through **easy to use and contextual dashboards** and management information

Allows to achieve sales objectives with a **lower stock to sales ratio** and to make available inventory where it is most needed

Promotions management functionality and **customer loyalty programs** help boost sales

Allows to run a **single stock pool** across all sales channels reducing stock holding and improving stock turns



iVend Retail + Microsoft Dynamics 365 Business Central

Integrated Masters

Masters will be integrated between iVend Retail and Microsoft Dynamics 365 Business Central:

Bidirectional

- Item
- Item Substitution
- Item Charge
- Customer
- Vendor
- Manufacturer
- Shipping Agent
- Salesperson/Purchaser
- Country/Region
- Item Cross Reference

Microsoft Dynamics 365 Business Central to iVend Retail

- Location
- Tax Posting Setup
- Production BOM
- BOM Component
- Currency
- Currency Exchange Rate
- Unit of Measure
- Item Unit of Measure
- Customer Price Group
- Customer Discount Group
- Item Discount Group
- Sales Price
- Purchase Price
- Sales Line Discount

iVend Retail to Microsoft Dynamics 365 Business Central

- iVend Retail Tender



iVend Retail + Microsoft Dynamics 365 Business Central

Integrated Transactions

POS Transactions

- Sale
- Special Order
- Sales Order Fulfillment
- Sale with Delivery Fulfillment
- Sale Refund
- Payments
- Gift Certificates

Periodic Transactions

- Till Variance
- Expense Posting

Inventory Transactions

- Delivery
- Purchase Order
- Goods Receipt Purchase Order
- Goods Return
- Goods Issue
- Goods Receipt
- Stock Transfer Request
- Stock Transfer Shipment/ Receipt
- KIT Build/Break

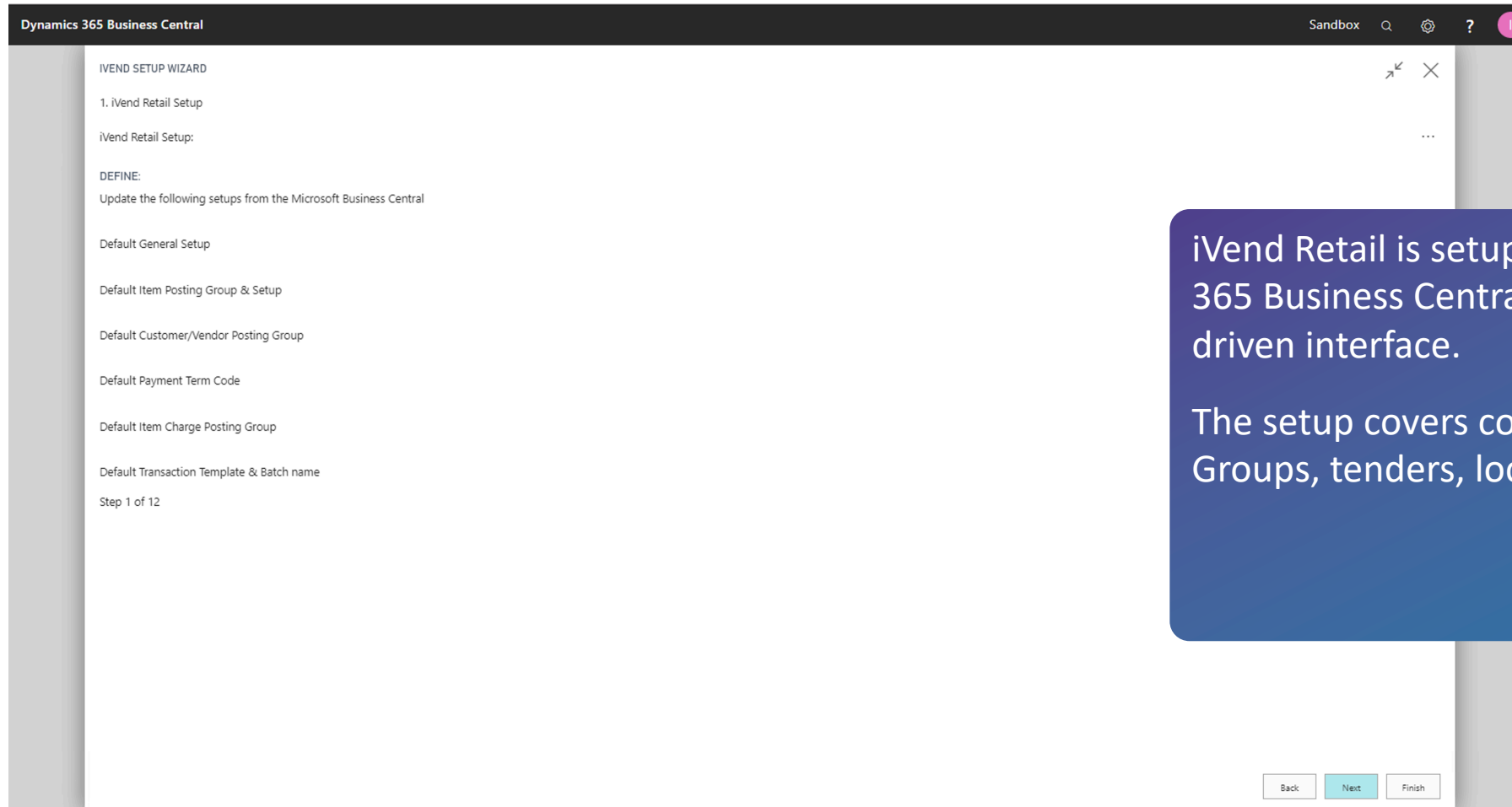
Integration Extensibility

- Custom property integration
- Custom object integration

Usability

- Browser interface included
- Priority Based Integration

iVend Setup



iVend Retail is setup with Microsoft Dynamics 365 Business Central using an intuitive wizard driven interface.

The setup covers configuration of Posting Groups, tenders, locations, transfer routes, etc

Retail Settings

Dynamics 365 Business Central

Sandbox

←

✎ + 🗑

✓ SAVED

Retail Setting

Show Attached

General

API URL

Retry Interval Minutes

Item

Inventory Posting Group	<input type="text" value="FINISHED"/>	Costing Method	<input type="text" value="FIFO"/>
Gen. Prod. Posting Group	<input type="text" value="RETAIL"/>	Item Tracking Code - Lot	<input type="text" value="LOTALL"/>
Tax Prod. Posting Group	<input type="text" value="NO VAT"/>	Item Tracking Code - Serial	<input type="text" value="SNALL"/>
Base Unit of Measure	<input type="text" value="PCS"/>		

Customer/Vendor >

Item Charge >

Gift Certificate >

Transaction

Payment Terms Code	<input type="text" value="15 DAYS"/>	Restrict Transaction From Retail Location	<input checked="" type="checkbox"/>
Item Template Name	<input type="text" value="IVEND"/>	Till Variance Integration	<input checked="" type="checkbox"/>
Item Batch Name	<input type="text" value="IVEND"/>	Allow Duplicate Barcode	<input checked="" type="checkbox"/>
Journal Template Name	<input type="text" value="IVEND"/>	Item Journal No. Series	<input type="text" value="JNL-GEN"/>

Retail settings assign default posting groups for Transactions, Items, Customer, Vendor, Item Charge, Gift Certificate etc. integrating from iVend Retail into Microsoft Dynamics 365 Business Central.

These settings ensures accuracy of financial entries without any manual intervention.

Integration Monitor

Dynamics 365 Business Central

Sandbox

Integration Monitor

Refresh Log Show Attached More options

Microsoft Dynamics BC To iVend

Do Not Display Failed Messages ☐ Records to Send 6

INTEGRATION KEY	SOURCE TYPE	SOURCE KEY	OPERATION TYPE	STATUS	LOG DATE	LOG TIME	API URL ADDRESS
837	Customer	01121212	Update	Not Processed	4/24/2019	4:51:48 PM	http://20.0.61.63:8642/iVendApi/V
838	Vendor	41483124	Update	Not Processed	4/24/2019	4:52:33 PM	http://20.0.61.63:8642/iVendApi/V
839	Item	70065	Insert	Not Processed	4/24/2019	4:53:52 PM	http://20.0.61.63:8642/iVendApi/V
840	Item	70066	Insert	Not Processed	4/24/2019	4:54:24 PM	http://20.0.61.63:8642/iVendApi/V
841	Item	70067	Insert	Not Processed	4/24/2019	4:54:58 PM	http://20.0.61.63:8642/iVendApi/V
842	Item	70068	Insert	Not Processed	4/24/2019	4:55:30 PM	http://20.0.61.63:8642/iVendApi/V

iVend To Microsoft Dynamics BC

Do Not Display Failed Messages ☐ No. Of Records: 4

INTEGRAT... KEY	SOURCE TYPE	SOURCE KEY	OPERATION TYPE	LOG DATE	LOG TIME	STATUS	IVEND INTEGRATION KEY	PRIORITY	TRANSACTION TYPE
1266	Sales Invoice	10000000000000067	Insert	4/23/2019	5:44:00 AM	Not Processed	10000000000001010	4	Transaction
1378	Payment	10000000000000101	Insert	4/23/2019	11:53:22 AM	Not Processed	10000000000001054	5	Transaction Payment
1439	Layaways Cancel	10000000000000121	Insert	4/24/2019	7:37:48 AM	Not Processed	10000000000001078	4	Transaction Layaways Ca...
1481	Purchase Order	10000000000000012	Update	4/24/2019	11:08:41 AM	Not Processed	10000000000001114	5	Transaction Purchase Or...

Consolidated, real-time view of integration status between iVend Retail and Microsoft Dynamics 365 Business Central.

Intuitive interface to debug /re-try failed events (if any)

User Defined Fields Integration

Dynamics 365 Business Central

Sandbox

UDF INTEGRATION - MASTER | WORK DATE: 1/28/2021

✓ SAVED

Search New Edit List Show Attached Open in Excel Actions Fewer options

18

Non Integrated UDF

Masters

Customer

Object Type

FIELD NAME	FIELD CAPTION	IVEND FIELD NAME
Search Name	Search Name	
Contact	Contact	
Telex No.	Telex No.	
Document Sending Profile	Document Sending Profile	
Ship-to Code	Ship-to Code	
Our Account No.	Our Account No.	
Territory Code	Territory Code	
Global Dimension 1 Code	Global Dimension 1 Code	
Global Dimension 2 Code	Global Dimension 2 Code	
Chain Name	Chain Name	
Budgeted Amount	Budgeted Amount	
Customer Posting Group	Customer Posting Group	
Language Code	Language Code	
Statistics Group	Statistics Group	
Payment Terms Code	Payment Terms Code	
Fin. Charge Terms Code	Fin. Charge Terms Code	
Salesperson Code	Salesperson Code	
Shipment Method Code	Shipment Method Code	
Place of Export	Place of Export	

Integrated UDF

Manage

FIELD NAME	FIELD CAPTION	IVEND FIELD NAME	INTEGRATED	IS LINE
iVendSkypeID	Skype ID	U_SkypeID	<input checked="" type="checkbox"/>	<input type="checkbox"/>

User Defined Fields, User Defined Tables and Objects integrated from Microsoft Dynamics 365 Business Central into iVend Retail

Global Sales & Support



A stylized world map composed of a grid of dots, with darker dots forming the continents. Six callout boxes are overlaid on the map, each representing a region and its number of offices. The regions are North America, Latin America, Europe, MENA, South Asia, and Asia Pacific.

North America
3 offices

Europe
3 offices

MENA
6 offices

South Asia
6 offices

Latin America
3 offices

Asia Pacific
1 office

New York | Mexico | London | Dublin | Dubai | New Delhi | Sydney

THANK YOU!



Name
Title
Company