Purchases

Menu: Loyalty / Purchases

Feature: Purchases

Editions: Cloud

You can use the Purchases page to search and view purchases within POS.

Purchase records are the source transaction data that drive things like dashboards, reports and loyalty point generation within POS. Kensium retail sales – generated by the Kensium Register – are an example of a purchase, but purchases can also include transaction activity that is generated from external systems.

> The main difference between a sale record and purchase record in POS is that the latter can come from any source.

This page uses the standard POS grid user interface. Users must have View purchases permission to view this page.

a) Search Filters

The following search filters are available:

- Cust
  - The customer ID of the person that made the purchase (exact match only).
- Member
  - The member ID of the person that made the purchase (exact match only).
- Location
  - The location where the purchase was made.

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    - This is a code value of a location defined as a POS location.
- Order Type
    - The order type of the purchase.
    - Order types are free-form; they may be defined external to Kensium (e.g. in an ERP).
- Trans #
    - The transaction number of the purchase.
    - Transaction numbers are generated at the source of the purchase; this may be Kensium Register, an ERP, or ecommerce system, for example.
- Channel
    - The channel (source) from which the purchase was made.
    - Channels are free-form; they may be defined external to Kensium (e.g. in an ERP or ecommerce system).
- SKU
    - Filter only transactions that contain this item SKU (exact match only).

b) Purchase Details

After searching for a purchase, the user can drill-down into a page that contains detailed information about the purchase. This detailed information includes the:

- Extensive information about the purchase, including:
    - Transaction #
    - Date
    - Customer and member information
    - Location and channel
    - Amount totals and subtotals
    - Loyalty points generated for the purchase, if any
- Line Items
    - The individual line items in the purchase, including:
        - Line item #
        - SKU and product name
        - Price and quantity
        - Other extended information that can be optionally displayed within the grid

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