

Terminal Verification Checklist: NSPOS 2018.1.X



Copyright © 2005, 2019, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

If this document is in public or private pre-General Availability status:

This documentation is in pre-General Availability status and is intended for demonstration and preliminary use only. It may not be specific to the hardware on which you are using the software. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to this documentation and will not be responsible for any loss, costs, or damages incurred due to the use of this documentation.

If this document is in private pre-General Availability status:

The information contained in this document is for informational sharing purposes only and should be considered in your capacity as a customer advisory board member or pursuant to your pre-General Availability trial agreement only. It is not a commitment to deliver any material, code, or functionality, and

should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Master Agreement, Oracle License and Services Agreement, Oracle PartnerNetwork Agreement, Oracle distribution agreement, or other license agreement which has been executed by you and Oracle and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Sample Code

Oracle may provide sample code in SuiteAnswers, the Help Center, User Guides, or elsewhere through help links. All such sample code is provided "as is" and "as available", for use only with an authorized NetSuite Service account, and is made available as a SuiteCloud Technology subject to the SuiteCloud Terms of Service at www.netsuite.com/tos.

Oracle may modify or remove sample code at any time without notice.

No Excessive Use of the Service

As the Service is a multi-tenant service offering on shared databases, Customer may not use the Service in excess of limits or thresholds that Oracle considers commercially reasonable for the Service. If Oracle reasonably concludes that a Customer's use is excessive and/or will cause immediate or ongoing performance issues for one or more of Oracle's other customers, Oracle may slow down or throttle Customer's excess use until such time that Customer's use stays within reasonable limits. If Customer's particular usage pattern requires a higher limit or threshold, then the Customer should procure a subscription to the Service that accommodates a higher limit and/or threshold that more effectively aligns with the Customer's actual usage pattern.

Beta Features

Oracle may make available to Customer certain features that are labeled "beta" that are not yet generally available. To use such features, Customer acknowledges and agrees that such beta features are subject to the terms and conditions accepted by Customer upon activation of the feature, or in the absence of such terms, subject to the limitations for the feature described in the User Guide and as follows: The beta feature is a prototype or beta version only and is not error or bug free and Customer agrees that it will use the beta feature carefully and will not use it in any way which might result in any loss, corruption or unauthorized access of or to its or any third party's property or information. Customer must promptly report to Oracle any defects, errors or other problems in beta features to support@netsuite.com or other designated contact for the specific beta feature. Oracle cannot guarantee the continued availability of such beta features and may substantially modify or cease providing such beta features without entitling Customer to any refund, credit, or other compensation. Oracle makes no representations or warranties regarding functionality or use of beta features and Oracle shall have no liability for any lost data, incomplete data, re-run time, inaccurate input, work delay, lost profits or adverse effect on the performance of the Service resulting from the use of beta features. Oracle's standard service levels, warranties and related commitments regarding the Service shall not apply to beta features and they may not be fully supported by Oracle's customer support. These limitations and exclusions shall apply until the date that Oracle at its sole option makes a beta feature generally available to its customers and partners as part of the Service without a "beta" label.

Send Us Your Feedback

We'd like to hear your feedback on this document.

Answering the following questions will help us improve our help content:

- Did you find the information you needed? If not, what was missing?
- Did you find any errors?
- Is the information clear?
- Are the examples correct?
- Do you need more examples?
- What did you like most about this document?

Click [here](#) to send us your comments. If possible, please provide a page number or section title to identify the content you're describing.

To report software issues, contact NetSuite Customer Support.

Table of Contents

- Overview 1
- Verification Steps 2
 - User Interface 2
 - Finding Items 2
 - Transaction Processing 3
 - Reports Functionality 4
 - NetSuite ERP Integration Functionality 4
 - Gift Cards Functionality 5
- Terminal Verification Checklist 7

Overview

Applies to: NetSuite Point of Sale (NSPOS)

This document lists steps for verifying the basic functionality of NetSuite Point of Sale (NSPOS) 2018.1.X terminals serving as registers in stores or other locations. Retailers or their representatives should perform verifications as part of user acceptance testing (UAT) and after deployment. Each section will help identify issues prior to a store resuming with consumer transactions. Verification covers the following areas:

- User interface
- Finding items
- Transaction processing
 - Selling items
 - Returning items
- Reports Functionality
- NetSuite ERP Integration Functionality
- Gift Cards Functionality
 - Selling Gift Cards
 - Checking the Gift Card Balance in NSPOS
 - Checking the Gift Card Balance in NetSuite ERP
 - Redeeming Gift Cards



Important: Please perform the verification process in the order provided. Some processes depend on the results from previous tests.

This document is not intended to be a set of detailed step-by-step instructions. We assume that you have a good understanding of how the application works and of the typical business tasks that are required to complete each test.



Tip: We recommend testing at least one terminal (register) in every store.

Note that custom configurations to the user interface, processes or other NSPOS areas might require different testing scenarios. Customizations can also affect results. Before marking any verification unsuccessful, you should consider the impact customizations might have had on the test scenario.

Before contacting Technical Support, verify that all instructions were followed and recheck any values that were entered during the testing. Repeat the individual steps as required. Then, if the failure persists, contact Technical Support.

To contact Technical Support:

1. Log into NetSuite.
2. From the **Support** tab, click **Go to SuiteAnswers**.
3. Click **Contact Support by Phone**.
4. Locate your **NetSuite account number** at the top of the window that opens.
5. Call Technical Support using the telephone number listed for your region.
6. Choose **option 9** for Retail, and then **option 1** for NetSuite Point of Sale.

Verification Steps

Applies to: NetSuite Point of Sale (NSPOS)

This chapter provides the tasks used to verify NetSuite Point of Sale (NSPOS) terminals after deployment.

User Interface

This section checks general NSPOS user interface (UI) functionality. The image below shows the default interface layout.



| Step | Action | Expected Result |
|------|---|--------------------------------------|
| 1 | Sign on to NSPOS. | User is signed on. |
| 2 | Check if Status Bar is present and visible. | Status Bar present and visible. |
| 3 | Check if Main Button Bar is present and visible. | Main Button Bar present and visible. |
| 4 | Check if Side Button Bar is present and visible. | Side Button Bar present and visible. |
| 5 | Check if Journal Window is present and visible. | Journal Window present and visible. |

Finding Items

This section checks the functionality for finding items in NSPOS, both manually and by scanning bar codes if a scanner is available.

Note: the location of the **Find Item** button may vary based on individual customizations. By default, the button is on the **Side Button Bar** at the right side of the screen.

| Step | Action | Expected Result |
|------|--|--|
| 1 | Sign on to NSPOS. | User is signed on. |
| 2 | Locate the Find Item button and tap it. | Function located and activated. |
| 3 | Enter item name in the open form and confirm search. Wait for search processing. | Item found and displayed in the form. |
| 4 | Tap item and add it to the Journal. | Item displayed in Journal with correct name and price. |

Continue with this section if you have bar code scanning hardware available.

| | | |
|---|--|---|
| 5 | Locate a physical item known to be an item in NSPOS. | Item ready to scan. |
| 6 | Scan item bar code. | Corresponding item is added to the Journal. |

Tip: If you have different item types such as matrix items, you should perform this test for each item type.

Transaction Processing

These steps check basic NSPOS customer-transaction processes, including payment gateway functionality.

Warning: Be aware that these procedures create live transactions with corresponding ledger entries and a payment card debit. The credit or debit card used for testing might be charged. You can use the steps for testing item returns to refund the charge.

Selling Items

These steps verify the functionality for selling items to the store.

| Step | Action | Expected Result |
|------|---|--|
| 1 | Sign on to NSPOS. | User is signed on. |
| 2 | Choose a purchase item. | Item displayed in Journal with correct name and price. |
| 3 | Complete transaction with a cash payment. | Taxes and price are correctly applied . |
| 4 | Print receipt. | Receipt prints with expected information such as logos, customer number, prices and taxes. |


A valid credit or debit card is required to complete this procedure. The card might be charged.

| Step | Action | Expected Result |
|------|-------------------|--------------------|
| 1 | Sign on to NSPOS. | User is signed on. |

| | | |
|---|---|--|
| 2 | Choose a purchase item. | Item displayed in Journal with correct name and price. |
| 3 | Complete transaction with a credit or debit card payment. | Taxes and price are correctly applied . |
| 4 | Print receipt. | Receipt prints with expected information such as logos, customer number, prices and taxes. |

Returning Items


These steps verify the functionality for returning items to the store. The task can be used to refund any credit or debit card charges applied in the previous selling steps.

 **Note:** The location of the **VOIDS/RETURNS** button may vary based on individual customizations. By default, the button is on the **Main Button Bar** at the bottom of the screen.

| Step | Action | Expected Result |
|------|---|--|
| 1 | Sign on to NSPOS. | User is signed on. |
| 2 | Locate the items return function and tap it. | Function located and activated. |
| 3 | Find the transaction to return. You can use a receipt number, scanning it if a bar code scanner is available. | Transaction found. |
| 4 | Return the transaction. | Transaction returned. Taxes and prices applied correctly. |
| 5 | Print receipt. | Receipt prints with expected information such as logos, customer number, prices and taxes. |

Reports Functionality

This section checks the NSPOS basic reporting functionality.


 **Note:** The location of the **Reports** button may vary based on individual customizations. By default, the button is on the **Main Button Bar** at the bottom of the screen. The type of reports available can differ based on your assigned user role and business type.

| Step | Action | Expected Result |
|------|---|---|
| 1 | Sign on to NSPOS. | User is signed on. |
| 2 | Locate the Transaction Detail report and tap it. Note: You can check another report if the Transaction Detail report is unavailable. | Report contains data from previously generated transaction and displays properly. |


 **Tip:** You should test other reports that are important to your business.

NetSuite ERP Integration Functionality

These steps test the synchronization from NSPOS to NetSuite ERP. This synchronization is called **upsync**.

 **Important:** Access to your NetSuite online account is required to complete this check.


| Step | Action | Expected Result |
|------|--|---|
| 1 | Login in to NetSuite. | User is logged in. |
| 2 | Go to Transactions > Sales > Create Invoices > List. | Transaction list displays. |
| 3 | Sort the transaction list by the most recent Date . | Most recent transaction appears at top of list. |
| 4 | Locate the previous transaction made during this verification process. | Transaction entry is available. |
| 5 | Verify the entry details are correct. If desired, use the receipt from the previous transaction. | Transaction details are correct. |


 **Tip:** If desired, test the synchronization from NetSuite ERP to NSPOS. This synchronization is called **downsync**.

You can do this test by creating a new Customer in NetSuite ERP and waiting 15 minutes or less for the Customer to downsync to the terminal.

Gift Cards Functionality

This section checks basic gift cards availability and functionality in NSPOS. You can skip this section if you are not using gift cards for your business. Gift cards and gift certificates use similar processes in NetSuite ERP and NSPOS. Although these steps list gift card, substitute gift certificate as needed to fit your business model.

 **Important:** Be aware that these procedures create a live transaction, with corresponding ledger entries.

 **Note:** The location of the **Sell Gift Card** button may vary based on individual customizations. By default, the button is on the **Side Button Bar** at the right side of the screen.

Selling Gift Cards

| Step | Action | Expected Result |
|------|--|--|
| 1 | Sign on to NSPOS. | User is signed on. |
| 2 | Locate the Sell Gift Card function and tap it. | Function located and activated. |
| 3 | Create and sell gift card with the amount of money desired. Note: The process for selling gift cards or gift certificates can vary, so follow steps normally used for your business. | Gift card is sold. |
| 4 | Wait for the transaction to upsync with NetSuite ERP. Note: The default upsync frequency for integration with NetSuite ERP is 15 minutes. To be certain the upsync completes, you might wait 20 minutes. | Time elapsed for the upsync to complete. |

Checking the Gift Card balance in NSPOS

Complete this task after upsync completes.

| Step | Action | Expected Result |
|------|---|--|
| 1 | Sign on to NSPOS. | User is signed on. |
| 2 | <p>Locate the Gift Card Balance button and tap it.</p> <p>Your button may be labeled Balance Check or another name.</p> <p>Note: By default, the button is on the Side Button Bar at the right side of the screen.</p> <p>If the button is not visible, press Ctrl+F12 to navigate to the function list, find and tap Authorized Gift Card Balance.</p> | You are prompted to choose Card or Certificate . |
| 3 | Choose Certificate or Card based on the type you sold in the Selling Gift Cards steps. | <p>You are prompted to enter the Authorization Code (certificate) or Number (card).</p> <p>You can swipe a gift card in an attached PIN pad.</p> |
| 4 | Complete the information based on the details from the Selling Gift Cards steps. | Balance matches the price of the gift card sold. |

Checking the Gift Card Balance in NetSuite ERP

| Step | Action | Expected Result |
|------|--|--|
| 1 | Log in to NetSuite. | User is logged in. |
| 2 | Go to Lists > Accounting > Gift Certificates. | Gift certificates list displays. This list include gift cards. |
| 3 | <p>Locate the card sold in the Selling Gift Cards steps.</p> <p>You can search for the Gift Certificate Code using the gift card number or authorization code for a certificate.</p> | Card found in list. |
| 4 | Compare the Remaining Value with the sell amount performed in the Selling Gift Cards steps. | Remaining Value should match price of gift card or gift certificate sold. |

Redeeming Gift Cards

| Step | Action | Expected Result |
|------|---|---------------------------------------|
| 1 | Sign on to NSPOS. | User is signed on. |
| 2 | Choose a purchase item that, with taxes, will sell at or below the gift card balance. | Item displays in Journal. |
| 3 | Tender out the transaction using the gift card. | Transaction should show paid in full. |

Terminal Verification Checklist

① Applies to: NetSuite Point of Sale (NSPOS)

After upgrading to NetSuite Point of Sale (NSPOS) 2018.1.X, use this checklist with the [Verification Steps](#) to sign off on one or more registers in each store. You can print this checklist as a single page for each store.

NSPOS Release NSPOS 2018.1.(__)

Store # _____

Terminal # _____

Date _____

Reviewed by _____

| NSPOS Function | All Steps Working? | | Notes |
|--|--------------------|-------|-------|
| | Yes | No | |
| User Interface | _____ | _____ | _____ |
| Finding Items | _____ | _____ | _____ |
| Selling Items | _____ | _____ | _____ |
| Returning Items | _____ | _____ | _____ |
| Reports Functionality | _____ | _____ | _____ |
| NetSuite ERP Integration Functionality | _____ | _____ | _____ |
| Gift Cards Functionality | _____ | _____ | _____ |

Comments
