

Terminal Verification Checklist: NSPOS 2018.2.X



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# Overview

 **Applies to:** NetSuite Point of Sale (NSPOS)

This document lists steps for verifying the basic functionality of NetSuite Point of Sale (NSPOS) 2018.2.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.

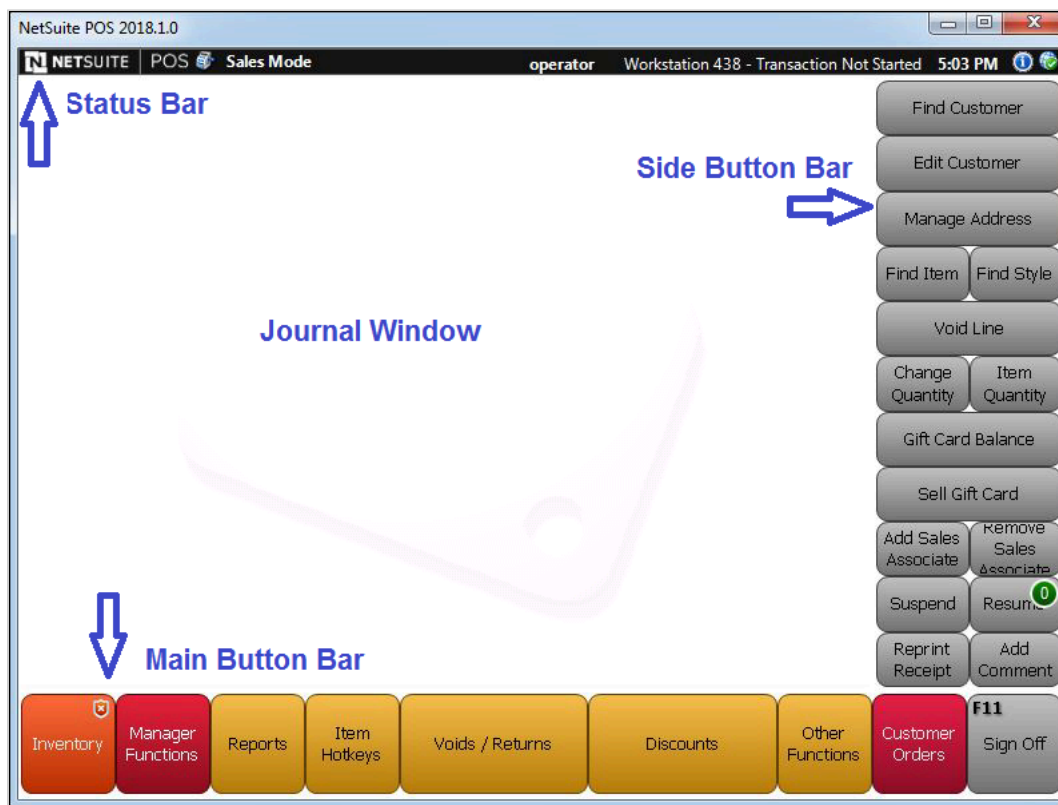
# Verification Steps

**Applies to:** NetSuite Point of Sale (NSPOS)

This section provides tasks you can use to verify that NetSuite Point of Sale (NSPOS) registers are ready for business 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 <b>Status Bar</b> is present and visible.	Status Bar present and visible.
3	Check if <b>Main Button Bar</b> is present and visible.	Main Button Bar present and visible.
4	Check if <b>Side Button Bar</b> is present and visible.	Side Button Bar present and visible.
5	Check if <b>Journal Window</b> 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 <b>Find Item</b> 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 <b>Transaction Detail</b> report and tap it. <b>Note:</b> 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 <b>Date</b> .	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 <b>Sell Gift Card</b> function and tap it.	Function located and activated.
3	Create and sell gift card with the amount of money desired.	Gift card is sold.

	<b>Note:</b> The process for selling gift cards or gift certificates can vary, so follow steps normally used for your business.	
4	Wait for the transaction to upsync with NetSuite ERP.  <b>Note:</b> 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	Locate the <b>Gift Card Balance</b> button and tap it.  Your button may be labeled <b>Balance Check</b> or another name.  <b>Note:</b> By default, the button is on the <b>Side Button Bar</b> at the right side of the screen.  If the button is not visible, press <b>Ctrl+F12</b> to navigate to the function list, find and tap <b>Authorized Gift Card Balance</b> .	You are prompted to choose <b>Card</b> or <b>Certificate</b> .
3	Choose <b>Certificate</b> or <b>Card</b> based on the type you sold in the <b>Selling Gift Cards</b> steps.	You are prompted to enter the <b>Authorization Code</b> (certificate) or <b>Number</b> (card).  You can swipe a gift card in an attached PIN pad.
4	Complete the information based on the details from the <b>Selling Gift Cards</b> 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	Locate the card sold in the <b>Selling Gift Cards</b> steps.  You can search for the <b>Gift Certificate Code</b> using the gift card number or authorization code for a certificate.	Card found in list.
4	Compare the <b>Remaining Value</b> with the sell amount performed in the <b>Selling Gift Cards</b> steps.	<b>Remaining Value</b> should match price of gift card or gift certificate sold.

## Redeeming Gift Cards

Step	Action	Expected Result
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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) 2018.2.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 2018.2.(\_\_)

**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

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