

Strive – Functional Requirement Specification

Module Name: Sales Module

Document Name: Functional Requirement Specification

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CR 1 Introduction:

This document provides a high-level overview of the Web Sales module.

CR 1.1 Navigation

The user will have access to open the Strive app from any browser in the Desktop. On opening the app, the user will be navigated to the login page and can use appropriate credentials to login to the internal web application. The user will be navigated to the home screen upon logging in the portal.

CR 1: Login page

CR 2: Login Page -> Home

CR 3.1: Login Page -> Home -> Sales

CR 2 Login Page

The login page will display fields 'Username' and 'Password' and login button.



CR 2.1 Exception Handling

Description	Activity	Post Condition
Incorrect Username or Password	System alerts user with warning message “Username or password was incorrect.”	Screen refreshes and loads the login page.
Username or Password not entered	System alerts user with warning message “Username or password was incorrect.”	Screen refreshes and loads the login page.

CR 3 Sales – Desktop App

The Strive web application can be accessed from any of the following browsers:

1. Safari
2. Chrome
3. Firefox
4. Edge

Upon successful login, the user will be navigated to the Home screen by default. The navigation bar for the entire web application will display the 9 icons specified below depending on the user roles.

1. Home
2. Washes
3. Detail
4. Sales
5. Messenger
6. Checkout
7. Payroll
8. Reports
9. Admin

There are 4 user roles that can access this application:

1. Admin
2. Owner
3. Manager
4. Cashier

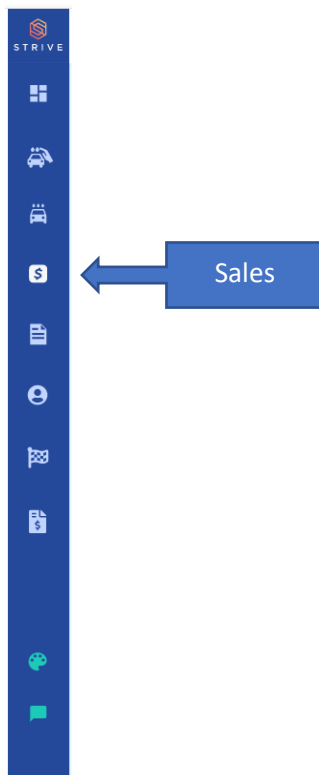
Depending on the user role, the users will either have access to the entire application or will have access to specific restricted modules in the application.

Admin and Owner User Roles will have complete access to the entire application as mentioned above. Manager and Cashier User Roles will have access to only the following modules in the web application:

1. Home/Dashboard
2. Checkout
3. Messenger
4. Sales
5. Washes
6. Details
7. Reports

This document will describe in detail about the Sales Module in the Internal Web Application for Strive.

Upon successful login, all users will be navigated by default to the Home Module in the Strive Web Application. The user shall be able to navigate to the Sales Module by selecting the sales icon on the navigation bar as shown below:



The Sales Module will be integrated with Converge, that the customer is currently using for payments. The future system should allow the user to enter the amounts and make the payments directly on the Strive Application without having the user manually navigate to the converge screen. The system should auto populate any sale data in converge in the backend simultaneously and process payments.

The Sales Module by default will display the following functionalities as shown in the mock:

1. Washes/Details Dashboard
2. Select from list
 - a. Add Item
 - b. Search Item
 - c. Items List
3. New
4. Cashier Keypad
5. Payment Options
 - a. Pay with Cash
 - b. Pay with Debit/Credit Card
 - c. Apply Discount
 - d. Gift Card
 - e. Account
 - f. Clear
6. Payment Processing
 - a. Process
 - b. Rollback – This functionality will not be accessible to a “Cashier” user and will only be available to “Manager”, “Operator” and “Admin” users.
 - c. Delete - This functionality will not be accessible to a “Cashier” user and will only be available to “Manager”, “Operator” and “Admin” users.
 - d. Print Receipt

[illegible]

CR 3.1 Washes and Details Dashboard

The Wash and Detail Dashboard shall display the following statistics for all users at the top of the Sales Module for the current location.

1. Current Wash Count
2. Current Detail Count
3. Current Employee Count
4. Score
5. Wait Time

Sales

Current No. of Washes

15

Current No. of Details

10

Wash Employees

15

Score

100

Current / Forecasted Cars

25/25

Average Car Wash Time

30min

Ticket No.

223456

Select

New

Item List

Item

Qty

Add

Search

CR 3.2 Select:

Upon navigating to the Sales module, the user shall be able to enter an existing ticket number and click “Select”. If the ticket number is valid and if there are any transactions associated with that ticket number, the system will display the item list of transactions that are associated with the corresponding ticket number selected.

STRIVE

70/60%

Mainstreet, GA

Cashier

Sales

Ticket No.

Done

Select

New

1	2	3	.00	BKSP
4	5	6	.	+/-
7	8	9	0	Clear

1\$

5\$

10\$

25\$

50\$

100\$

Cash

Gift

Credit

Discount

Account

Clear

Process

Rollback

Del

Print

Item List

Item

Qty

Add

Search

Item	Qty	T	Price	Actions
------	-----	---	-------	---------

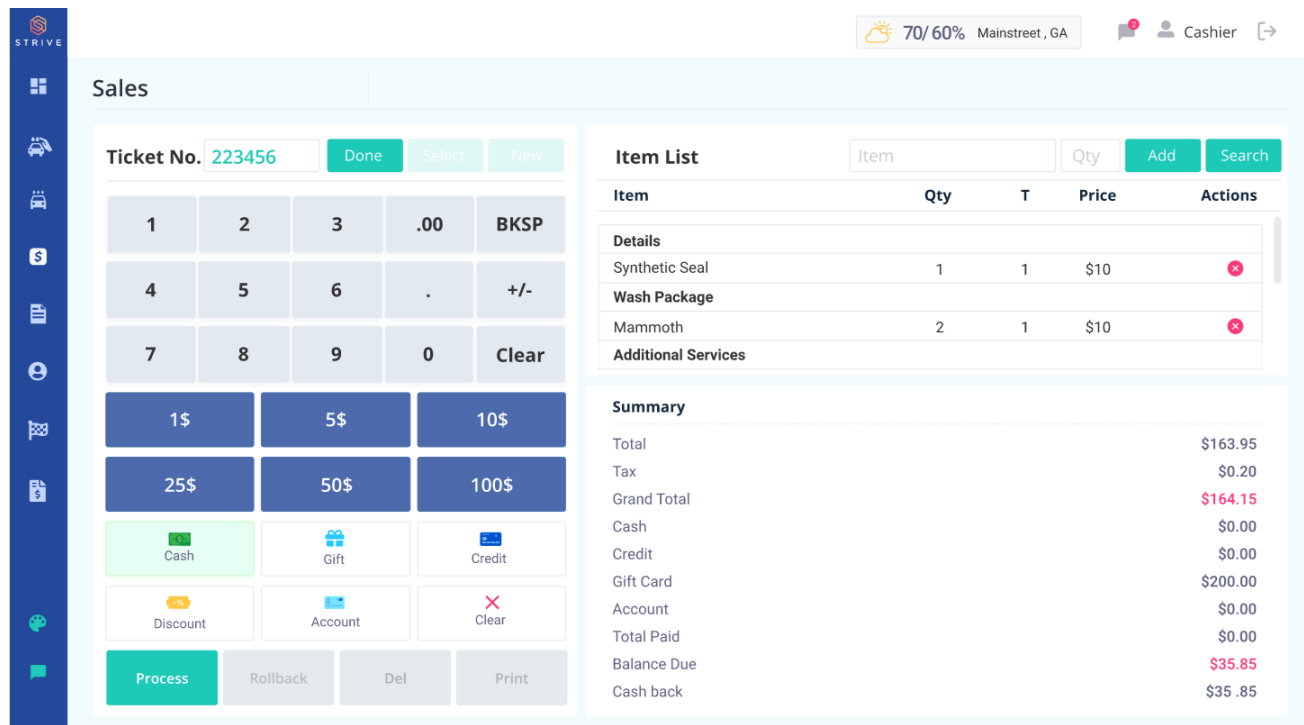
Summary

Total	\$0.00
Tax	\$0.00
Grand Total	\$0.00
Cash	\$0.00
Credit	\$0.00
Gift Card	\$0.00
Account	\$0.00
Total Paid	\$0.00
Balance Due	\$0.00
Cash back	\$0.00

If the user enters an invalid ticket number in the Ticket textbox, the system will display an error message “Invalid Ticket No., please enter a valid Ticket No. “with a “Cancel” button to navigate the user back to the Sales Screen.

CR 3.2.1 Add

Once the system displays all the items associated with the selected ticket number, the user will also be able to add a new item to the item list grid. The user will be able to enter or add new items to the item list grid for existing Tickets after selecting the ticket as specified above. The user shall be able to enter a valid Item name that needs to be included for payment with the quantity of the item required as shown in the mock below.



The screenshot displays the STRIVE Sales interface. At the top, there's a header with the STRIVE logo, weather information (70/60% Mainstreet, GA), and user information (Cashier). The main area is titled "Sales". On the left, there's a sidebar with various icons. The central part of the screen is divided into two main sections. The top section is for "Ticket No." entry, showing "223456" with buttons for "Done", "Select", and "New". Below this is a numeric keypad with digits 1-9, 0, and a "Clear" button. There are also buttons for "1\$", "5\$", "10\$", "25\$", "50\$", and "100\$". Below the keypad are buttons for "Cash", "Gift", "Credit", "Discount", "Account", and "Clear". At the bottom of this section are "Process", "Rollback", "Del", and "Print" buttons. The right section is titled "Item List" and contains a table with columns "Item", "Qty", "T", "Price", and "Actions". The table lists items: "Synthetic Seal" (Qty: 1, Price: \$10), "Wash Package" (Qty: 2, Price: \$10), and "Mammoth" (Qty: 1, Price: \$10). Below the table is a "Summary" section with a list of items and their corresponding amounts: Total (\$163.95), Tax (\$0.20), Grand Total (\$164.15), Cash (\$0.00), Credit (\$0.00), Gift Card (\$200.00), Account (\$0.00), Total Paid (\$0.00), Balance Due (\$35.85), and Cash back (\$35.85).

If the item is not found, or is invalid, the user will not be able to add the item to the Items list grid. If the item entered in the Item text box is valid, the user shall be able to select “Add” button to add it to the Items list. Once the user selects “Add”, the Item with the corresponding amount and price will be displayed on the Item list grid as shown in the mock below.

Washes Details Sales Reports Time Clock Admin Log Out Holcomb Bridge Mammoth Detail Salon

29128 Ticket Select New

European Dark Item 2 Qty Add

Search

1	2	3
4	5	6
7	8	9
.	0	.00
\$1	\$5	\$10
\$20	\$50	\$100
BkSp	+/-	CLR

Cash
Check
Credit
Discount
Gift Card
Account
Clear

Item	Qty	T	Price
Details			
Del	Edit	Interior Detail	1 7 144.95
Additional Services			
Del	Edit	PHOTO OF VEHICLE	1 7 0.00
Del	Edit	PREP VEHICLES	1 7 0.00
Del	Edit	DAILY DUTIES	1 7 0.00
Detail Upcharges (B)			
Del	Edit	Large Vehicle	1 7 15.00

Process Roll Back Delete Print

Total: \$159.95
Tax: \$0.00
Grand Total: \$159.95
Cash: \$0.00
Check: \$0.00
Credit: \$159.95
Gift Card: \$0.00
Account: \$0.00
Total Paid: \$159.95
Balance Due: \$0.00
Cash Back: \$0.00

Washes Details Sales Reports Time Clock Admin Log Out Holcomb Bridge Mammoth Detail Salon

29128 Ticket Select New

Item Qty Add

Search

1	2	3
4	5	6
7	8	9
.	0	.00
\$1	\$5	\$10
\$20	\$50	\$100
BkSp	+/-	CLR

Cash
Check
Credit
Discount
Gift Card
Account
Clear

Item	Qty	T	Price
Details			
Del	Edit	Interior Detail	1 7 144.95
Additional Services			
Del	Edit	PHOTO OF VEHICLE	1 7 0.00
Del	Edit	PREP VEHICLES	1 7 0.00
Del	Edit	DAILY DUTIES	1 7 0.00
Detail Upcharges (B)			
Del	Edit	Large Vehicle	1 7 15.00
Del Items			
Del	Edit	European Dark Roast	2 7 4.00

Process Roll Back Delete Print

Total: \$163.95
Tax: \$0.20
Grand Total: \$164.15
Cash: \$0.00
Check: \$0.00
Credit: \$200.00
Gift Card: \$0.00
Account: \$0.00
Total Paid: \$200.00
Balance Due: \$35.85
Cash Back: \$35.85

CR 3.2.2 Search

Further, the user can search for items, by using the “Search” functionality. The user will be able to select “Search” button and search for any item. The users’ selection of the “Search” icon will open a modal window with “Item Name” and “UPC” search fields. The user will be able to type item names in the “Item Name” field and the search results will auto populate and will act as a live search, where the user will be able to view the item search results as they type. Please see mock below for reference.

The screenshot shows the Telliant POS interface. At the top, there are navigation tabs: Washes, Details, Sales, Reports, Time Clock, Admin, and Log Out. Below these, there's a header area with '29128 Ticket' and buttons for 'Select' and 'New'. A search bar is visible with the text 'Search'. A numeric keypad is on the left. A modal window titled 'Item Search -- Webpage Dialog' is open, showing a URL and fields for 'Item Name' and 'UPC'. The search results table is empty, displaying 'No Items Found.'.

Item Name	Category	UPC	Price
No Items Found.			

On the right side of the interface, there's a summary section with labels like 'Total:', 'Tax:', 'd Total:', 'Cash:', 'Check:', 'Credit:', 'ft Card:', 'ccount:', 'al Paid:', 'Balance Due:', and 'Cash Back:'.

This screenshot shows the same Telliant POS interface, but the search dialog now displays a list of items. The 'Item Name' field contains 'da'. The search results table lists several items with their categories, UPCs, and prices.

Item Name	Category	UPC	Price
Condition Dash	Additional Services		4
DAILY DUTIES	Additional Services		0
Dasani Plus	Deli Items		1.75
Dasani Water	Deli Items	499770	2
European Dark Roast	Deli Items		2
Ladies Day	Service Discounts	123	7.25

The user shall be able to select the desired item from the Item list by double clicking on the desired item from the item search results. The users' action of selecting the desired item from the Item search results list will navigate the user back to the "Sales" module and auto populate the item name in the "Item Name" field.

as shown in the mock below. Once the system auto populates the “Item Name” field with the selected item, the user will be able to add the quantity of the item required to be added in the “Quantity” field. Further, if the user wants to select a different item instead of the item selected, the user shall be able to select “Search” button again and the system will open a modal window where the user shall be able to perform the item search functionality as specified earlier again and select the desired item.

Item Search -- Webpage Dialog

http://192.168.8.50:91/CashOutSelItemDig.asp?LocationID=3

Item Name: da UPC:

Item Name	Category	UPC	Price
Condition Dash	Additional Services		4
DAILY DUTIES	Additional Services		0
Dasani Plus	Deli Items		1.75
Dasani Water	Deli Items	499770	2
European Dark Roast	Deli Items		2
Ladies Day	Service Discounts	123	-25

Search

1 2 3
4 5 6
7 8 9
. 0 .0
\$1 \$5 \$1
\$20 \$50 \$1
BkSp +/- CLR Clear Print

29128 Ticket Select New

Item Qty T P

Details

Del	Edit	Item	Qty	T	P
		Interior Detail	1	?	1

Additional Services

Del	Edit	Item	Qty	T	P
		PHOTO OF VEHICLE	1	?	0.00
		PREP VEHICLES	1	?	0.00
		DAILY DUTIES	1	?	0.00

Detail Upcharges (B)

Del	Edit	Item	Qty	T	P
		Large Vehicle	1	?	15.00

Total: Tax: d Total: Cash: Check: Credit: ft Card: ccount: al Paid: Balance Due: Cash Back:

29128 Ticket Select New

European Dark Item Qty Add

Search

1 2 3
4 5 6
7 8 9

Cash
Check
Credit

Item Qty T Price

Details

Del	Edit	Item	Qty	T	Price
		Interior Detail	1	?	144.95

Additional Services

Del	Edit	Item	Qty	T	Price
		PHOTO OF VEHICLE	1	?	0.00
		PREP VEHICLES	1	?	0.00
		DAILY DUTIES	1	?	0.00

Detail Upcharges (B)

Del	Edit	Item	Qty	T	Price
		Large Vehicle	1	?	15.00

Process

Total: \$159.95
Tax: \$0.00

29128

Ticket

Select

New

European Dark

Item

2

Qty

Add

Search

1

2

3

4

5

6

7

8

9

.

0

.00

\$1

\$5

\$10

Cash

Check

Credit

Discount

Gift Card

Item	Qty	T	Price
Details			
Del	Edit	Interior Detail	1 ? 144.95
Additional Services			
Del	Edit	PHOTO OF VEHICLE	1 ? 0.00
Del	Edit	PREP VEHICLES	1 ? 0.00
Del	Edit	DAILY DUTIES	1 ? 0.00
Detail Upcharges (8)			
Del	Edit	Large Vehicle	1 ? 15.00

Process

Roll Back

Total: \$159.95

Tax: \$0.00

Grand Total: **\$159.95**

Cash: \$0.00

Check: \$0.00

Credit: \$159.95

Gift Card: \$0.00

CR 3.3 New

The user will be able to select "New" to create a new ticket number and add items to the ticket with the corresponding quantities. Once the user selects "New" the system will generate and display the new Ticket Number with the Item and Quantity Text fields with an "Add" button adjacent to it as shown in the mock below:

Washes

Details

Sales

Reports

Time Clock

Admin

Log Out

Holcomb Bridge Mammoth Detail

Ticket

Select

New

Search

1

2

3

4

5

6

7

8

9

.

0

.00

\$1

\$5

\$10

\$20

\$50

\$100

Cash

Check

Credit

Discount

Gift Card

Account

Item	Qty	T	Price
No records were found.			

Process

Roll Back

Delete

Total: \$0.00

Tax: \$0.00

Grand Total: **\$0.00**

Cash: \$0.00

Check: \$0.00

Credit: \$0.00

Gift Card: \$0.00

Account: \$0.00

[illegible]

The user shall be able to enter a valid Item name that needs to be included for payment with the quantity of the item required. If the item is not found, or is invalid, the user will not be able to add the item to the Items list. If the item entered in the Item text box is valid, the user shall be able to select “Add” button to add it to the Items list. Once the user selects “Add”, the Item with the corresponding amount and price will be displayed on the Item list as shown in the mock below. Further the user will also be able to perform search functionality and add item functionality as described previously.

30939	Ticket	Select	New
-------	--------	--	---

Dasani Water	Item	1	Qty	Add
---------------------	------	---	-----	---

[Search](#)

1	2	3
4	5	6
7	8	9
.	0	.00
\$1	\$5	\$10
\$20	\$50	\$100
BkSp	+/-	CLR

Cash
Check
Credit
Discount
Gift Card
Account
Clear

Item	Qty	T	Price
Wash Package			
Del Edit Mini Mammoth	2		? 0.00
Details			
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00
Del Edit Synthetic Seal	1		? 0.00

Process
Roll Back
Delete
Print

Total: \$0.00

Tax: \$0.10

Grand Total: \$0.10

Cash: \$0.00

Check: \$0.00

Credit: \$0.00

Gift Card: \$0.00

Account: \$0.00

Total Paid: \$0.00

Balance Due: **(\$0.10)**

Cash Back: \$0.00

[illegible]

CR 3.4 Item List

Once the user has added the required items for the ticket as specified above, the list of items and packages associated with the ticket number, any discounts applied will also be displayed in a grid format as shown in the mock below with Item Details, Quantity and Price of the corresponding item. The user will be able to update the Item list as required. The user shall be able to perform the following actions in the Items List grid:

- a) Edit - This functionality will not be accessible to a “Cashier” user and will only be available to “Manager”, “Operator” and “Admin” users.
- b) Delete - This functionality will not be accessible to a “Cashier” user and will only be available to “Manager”, “Operator” and “Admin” users.

Once the user double clicks on the desired item to edit from the Item List Grid, the system will display a modal window with the name of the item, quantity originally entered and the original price for the item with “Save “and “Cancel” options for the user to choose as shown below.

Washes Details Sales Reports Time Clock Admin Log Out Holcomb Bridge Mammoth Detail

29128 Ticket Select New

Item Qty Add

Search

1	2	3
4	5	6
7	8	9
.	0	.00
\$1	\$5	\$10
\$20	\$50	\$100
BkSp	+/-	CLR

Clear Print

Edit Item -- Webpage Dialog

Item: Comp. wash

Qty:

Price: x


Save Cancel

Item	Qty	T	Price
Wash Package			
Del	Edit	Mammoth	2 ? 69.90
Details			
Del	Edit	Interior Detail	1 ? 144.95
Additional Services			
Del	Edit	PHOTO OF VEHICLE	1 ? 0.00
Del	Edit	PREP VEHICLES	1 ? 0.00
Del	Edit	DAILY DUTIES	1 ? 0.00
Detail Upcharges (B)			
Del	Edit	Large Vehicle	1 ? 15.00

Total: \$408.85
Tax: \$0.20
Grand Total: \$409.05
Cash: \$0.00
Check: \$0.00
Credit: \$0.00
Gift Card: \$0.00
Account: \$0.00
Total Paid: \$0.00
Balance Due: (\$409.05)
Cash Back: \$0.00

The user shall be able update the Item details, Item Quantity and Price respectively and select “Save” for the updated results to reflect on the Item List Grid. The users’ selection of “Cancel” will navigate the user back to the original Items List Grid without performing any changes to the selected item.

Item		Qty	T	Price
Details				
Del	Edit	Interior Detail	1	? 144.95
Additional Services				
Del	Edit	PHOTO OF VEHICLE	1	? 0.00
Del	Edit	PREP VEHICLES	1	? 0.00
Del	Edit	DAILY DUTIES	1	? 0.00
Detail Upcharges (B)				
Del	Edit	Large Vehicle	1	? 15.00

If the user wants to remove one of the items from the Item List grid, the user shall be able to select “” option against the desired “Item” and the system will display an warning message confirming the deletion of the item “ Are you sure you want to delete the selected Item?” with “Yes” and “No” as options for the user to choose from. The users’ selection of “No” will navigate the user back to the Item







List without making any changes. The users' selection of "Yes" will remove the item from the Item List and navigate the user back to the Item List.

The screenshot shows the Telliant software interface for a car wash. At the top, there are navigation tabs: Washes, Details, Sales, Reports, Time Clock, Admin, and Log Out. The main area is divided into several sections. On the left, there's a 'Ticket' section with a '29128' and a 'Select' button. Below it is a 'Search' button and a keypad with numbers 1-9, 0, .00, \$1, \$5, \$10, \$20, \$50, \$100, BkSp, +/-, and CLR. In the center, there's a 'New' button and an 'Add' button. On the right, there's a table of items with columns 'Item', 'Qty', 'T', and 'Price'. The table lists various services and discounts. A confirmation dialog box is open in the center, asking 'Are you sure you want to Delete this Item?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted. Below the dialog box, there are buttons for 'Roll Back', 'Delete', and 'Print'. On the far right, there's a summary section showing 'Total: \$101.96', 'Tax: \$0.20', 'Grand Total: \$102.16', 'Cash: \$0.00', 'Check: \$0.00', 'Credit: \$0.00', 'Gift Card: \$0.00', 'Account: \$0.00', 'Total Paid: \$0.00', 'Balance Due: (\$102.16)', and 'Cash Back: \$0.00'.

CR 3.5 Cashier Keypad

The Cashier Keypad will include the following buttons and functionalities:

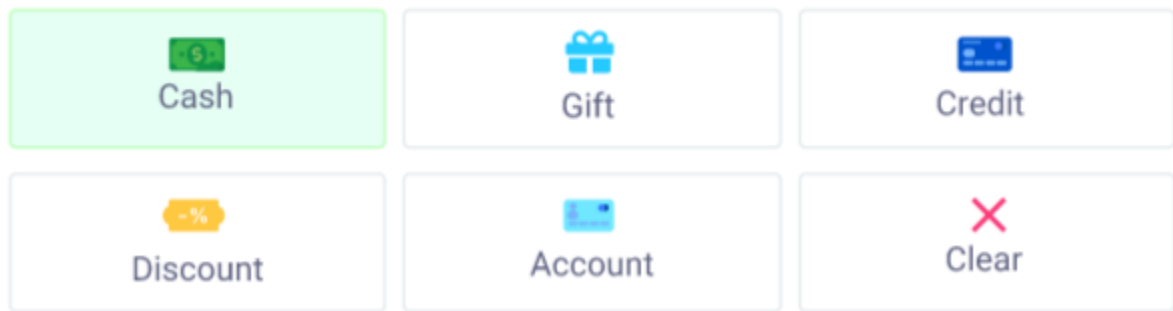
- Keypad with numbers "0-9", ".", and ".00" – User shall be able to use this to update the quantity of the items in the "Add Item" functionality to enter the total quantity of items to be purchased by the customer.
- \$1, \$5, \$10, \$20, \$50, \$100 - User shall be able to use this for the "Pay by Cash" functionality to enter the total amount paid by the customer in Cash.
- "BkSp" (Backspace) – This feature will allow the user to backspace or remove single characters from the end of the Quantity field/Item Field if there is any value/character entered. For instance, if the user enters the quantity of an item during the "Add Item" functionality as 45 and would like to remove the 5 without clearing the entire field, the user shall be able to do so by selecting "BkSp" button in the keypad which will remove the 5 from 45 and retain the 4.
- " +/- " button will allow the user to enter a "-ve" Number/ "+ve" number depending on the item and price.
- "CLR" (Clear) - This feature will allow the user to clear all the entire data from the Item/Quantity field, if there is any value/character entered. For instance, if the user enters the quantity of an item during the "Add Item" functionality as 450 and would like to clear the field, the user shall be able to do so by selecting "CLR" button in the keypad which will remove the entire number 450.

1	2	3	.00	BKSP
4	5	6	.	+/-
7	8	9	0	Clear
1\$		5\$		10\$
25\$		50\$		100\$
 Cash		 Gift		 Credit
 Discount		 Account		 Clear
Process		Rollback	Del	Print

CR 3.6 Payment Options

The user shall be able to choose the payment methods from the following options based on the customer preference:

1. Cash – If the user selects “Cash”, the user shall be able to enter the amount the customer has paid in cash using the Cashier Keypad and it will update the Balance Due Amount and Grand Total Calculation below the Item List Grid accordingly notifying the user of any cash back balance or if the customer has to pay any additional charges.



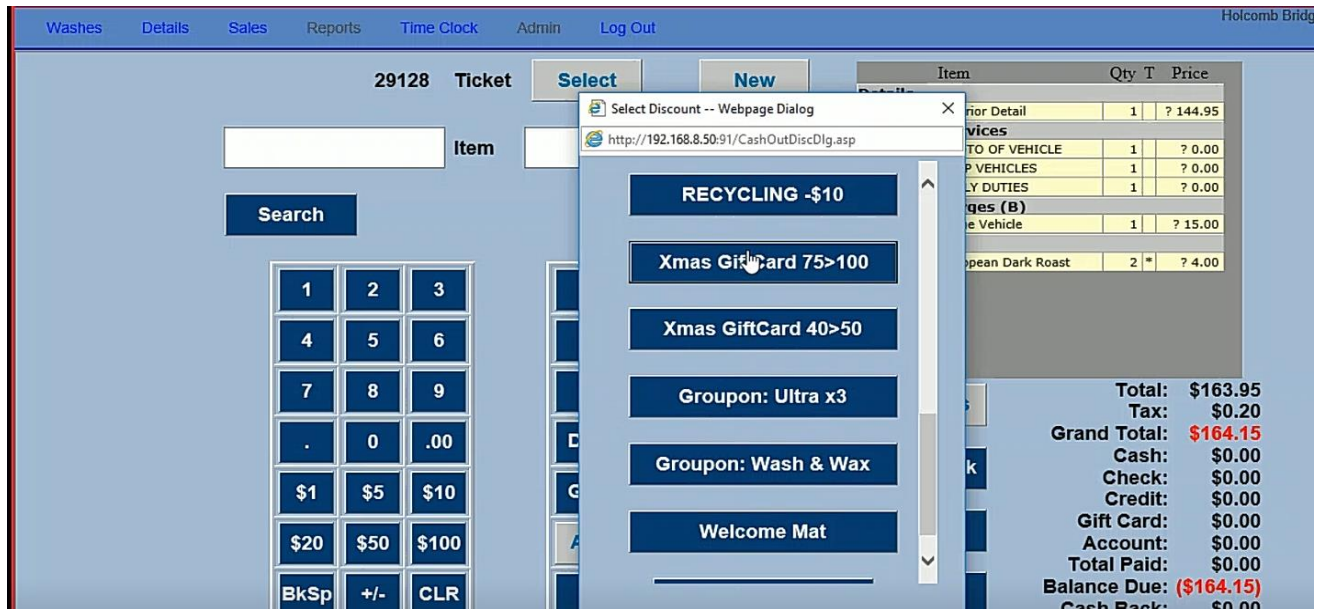
2. Credit – If the user selects “Credit”, the system will display a modal window with the total balance due amount field auto populated. The screen will also include “Process”, “Cancel” and Cash Back Keypad with Reset button. The Cashback keypad will include the following amounts:
- \$3
 - \$5
 - \$10
 - \$15
 - \$20
 - \$25
 - \$30
 - \$40
 - \$50

Further, the user shall be able to edit this field based on the amount paid by the customer and if the customer requests any cashback the user shall be able to enter the balance due amount with the requested cash back amount by selecting the respective amount using the Cashback Keypad. Further, the user shall be able to select “Reset” to remove any cashback amount added to the “Balance Due” amount field. Upon completion of editing the “Balance Due” field, the user shall be able to select “Process” button to complete transaction. The system should integrate with Converge and process the payment without having the user be navigated to the Converge Screen. If the user selects “Cancel” the system will navigate the user back to the Sales Module.

The screenshot shows the Telliant STRIVE software interface. A modal window titled "Select Credit Card -- Webpage Dialog" is open, displaying a total of 164.15. Below the total are buttons for "Process" and "Cancel". Underneath is a "Cash Back" section with a grid of buttons for various amounts: \$3, \$5, \$10, \$15, \$20, \$25, \$30, \$40, and \$50, along with a "Reset" button. The background interface shows a transaction screen with a "Ticket" number 29128, a "Search" button, a numeric keypad, and a list of items with their quantities and prices. A summary section on the right shows the total amount of \$163.95, tax of \$0.20, and a grand total of \$164.15.

3. Discount – If the user selects “Discount”, the system will display a modal window with multiple discount options for the user to choose from as shown in the mockup below. Once the user selects the appropriate discount that needs to be applied for the current transaction, and the system will display a modal window with the following fields for the user to input:
 - a. Manager/Operator/Admin ID: This will be the employee ID of a higher official such as a Manager, Operator or Admin
 - b. Passcode: The Manager/Operator/Admin will require to input a passcode to apply the selected discount to the transaction. Further, if the cashier user is trying to apply the discount, the cashier will require to request the manager user to apply the ID and passcode information for verification and to apply the discount for the transaction.

Once the user has inputted the requested information as specified above, the system will add the selected discount to the Item grid with the corresponding discount amount/price, thereby applying an overall discount to the item total. Based on the discount type applied, the adjusted balance due amount and grand total amount will be displayed below the Item List Grid.



- Gift Card – The user shall be able to choose this option if the customer has a Gift Card. The user shall be able to select “Gift Card” button from the Payment Options and the system will display a modal window as shown below. The modal window will include the “Amount Due” for the current transaction, “Gift Card No.” alphanumeric field where the user shall be able to enter the gift card no., “Select” button for the user to choose the appropriate gift card no., “Current Value” of the gift card if there is any balance available, “Amount” that the user wants to apply from the total available for the current transaction and “Balance” amount after the amount applied with “Process” and “Cancel” buttons. Once the user enters the “Gift Card No.”, the user shall be able to click on “Select” to select the appropriate Gift Card No. from the list of Gift Card No’s. as shown in the figure below. Upon selection of the desired “Gift Card No.” from the list, the user shall be able to enter the “Amount” that is required to be applied. Upon completion, the user’s selection of Process will update the transaction “Grand Total” and “Balance Due” amount respectively if the “Gift Card No.” and “Amount” entered is Valid. If the “Gift Card No.” is invalid, the system will display an error message “Invalid Gift Card No.” to the user. Similarly, if the user enters an amount more than the available balance in the Gift Card, the system will display an error message “Invalid Amount, please enter a valid Amount.”. If the user selects “Cancel” the system will navigate the user back to the Sales screen without processing.

Washes Details Sales Reports Time Clock Admin Log Out Holcomb Bridge Mammoth Detail Salon

29128 Ticket Select New

Item

Search

1	2	3
4	5	6
7	8	9
.	0	.00
\$1	\$5	\$10
\$20	\$50	\$100
BkSp	+/-	CLR

Amount Due: \$164.15

Gift Card #:

Select

Current Value: \$0.00

Amount:

Balance: \$0.00

Process Cancel

Item	Qty	T	Price
Wash Package	1		144.95
TO OF VEHICLE	1		0.00
P VEHICLES	1		0.00
LY DUTIES	1		0.00
ges (B)			
Vehicle	1		15.00
ean Dark Roast	2		4.00

Total: \$163.95
Tax: \$0.20
Grand Total: \$164.15
 Cash: \$0.00
 Check: \$0.00
 Credit: \$0.00
 Gift Card: \$0.00
 Account: \$0.00
 Total Paid: \$0.00
Balance Due: (\$164.15)
 Cash Back: \$0.00

STRIVE 70/60%

Sales

Ticket No. Done Select New

1	2	3	.00	BKSP
4	5	6	.	+/-
7	8	9	0	Clear

1\$	5\$	10\$
25\$	50\$	100\$

Cash	Gift	Credit
Discount	Account	Clear

Process Rollback Del Print

Item List

Item	Qty
Synthetic Seal	1
Wash Package	
Mammoth	2
Additional Services	

Summary

Total
 Tax
 Grand Total
 Cash
 Credit
 Gift Card
 Account
 Total Paid
 Balance Due
 Cash back

Gift Card

Amount Due \$163.95

Gift Card #

Current Value \$000.00

Amount

Balance \$000.00

Process

- Account – The user shall be able to select this option if the customer has an account associated with the car that they are getting service for. Upon selection of this option, the system will close out the Balance Due Amount and the Grand Total Amount indicating to the user that the transaction went through successfully. This is applicable only for unlimited wash packages. If the user buys any merchandise or if the customer purchases any other services, the user will be charged a balance for the additional services and items purchased. The system will display a balance due accordingly. The user shall be able to pay using “Cash”,

“Credit”, “Gift Card” or any other payment modes described above. Once the payment has been made for the additional services/purchased items, the balance due will reflect as “\$0.00”

6. Clear

CR 3.6 Payment Processing

The user shall be able to perform the following tasks for processing payments:

1. Process – Upon selection of Cash /Credit or Gift Card payment method, the user will be required to process the payment for completing the transaction using the selected payment method and the amount specified. The users’ selection of “Process” should integrate with Converge and complete the payment/transaction. If there is a processing error, the system will display an error message “Unable to complete payment, please try again.”
2. Roll Back – This functionality will allow the user to roll back any transaction that was completed. In case the customer doesn’t want to pay or wants to add another item after processing the transaction, the user will be able to select “Roll Back “and the system will display a warning message “Are you sure you want to roll back your previous transaction?” The users’ selection of “Confirm” will reset the payment and the Balance due and the Grand Total Amounts will be reset to the original amount displayed before the payment processing. Further, the user shall be able to add any additional items or remove items and process the transaction again. This functionality will only be available for the following user roles:
 - a. Manager
 - b. Owner
 - c. Admin

Summary	
Total	\$163.95
Tax	\$0.20
Grand Total	\$164.15
Cash	\$0.00
Credit	\$0.00
Gift Card	\$200.00
Account	\$0.00
Total Paid	\$0.00
Balance Due	\$35.85
Cash back	\$35.85

Process
Rollback
Del
Print

3. Delete – This functionality can be used by the user to delete any invalid tickets. For instance, if the customer decides to cancel the service after ticket generation, the user will be able to enter the ticket number in the “Ticket Number” field and select “Delete” to cancel this ticket or void this ticket. Once the user selects this functionality, the system will reload the page and display the default view of the Sales Module.
4. Print – Once the payment has been processed, the user shall be able to print the receipt for the customer using this functionality. Upon selection of “Print” the system will reload the page and display the default view of the sales page.
5. Grand Total Calculation – The system will display the following values for the current transaction below the item list grid:
 - a. Total – Total Amount of all the Items without Tax
 - b. Tax – Total Tax for any purchased items or merchandize. Services will not be taxed.
 - c. Grand Total – Total Amount of all the items with Tax
 - d. Cash – Amount Paid in Cash
 - e. Credit – Amount Paid in Credit
 - f. Gift Card – Amount Paid using Gift Card
 - g. Account – Amount Paid
 - h. Total Paid – Total Amount Paid by Customer
 - i. Balance Due – Total Balance Due
 - j. Cash Back – Amount in cash that has to be returned to the customer

Summary

Total	\$163.95
Tax	\$0.20
Grand Total	\$164.15
Cash	\$0.00
Credit	\$0.00
Gift Card	\$200.00
Account	\$0.00
Total Paid	\$0.00
Balance Due	\$35.85
Cash back	\$35.85

CR 4 Assumptions:

1. This application being designed for Phase 1 will only be for Mammoth Car Wash and similar car wash businesses, for other Nail Salons, Restaurants and Hair Salons, this feature will be included for Phase 2.

2. The actual representation of the mocks will vary from the FRS. The wireframes are just a representation of how the application will function, the look and feel of the application to be designed will be in accordance with design standards.
3. Payment Method by “Check” will not be included for the new system.
4. Mobile Unit to be built for Phase 2
5. Services can be updated/extended using the “Admin – Setup Services” Module.
6. Digital Gift Cards can be created and sent in the “Admin – Gift Cards” Module.