# Artisan™ POS Version 4.0 for Mac & PC

## DETAILED FEATURES LIST

## Point-of Sale (POS)

- **Sales Entry:** Sales can be rung up easily using bar codes, or by typing the item code (SKU) on the keyboard. Item descriptions, prices, discounts, and tax rates are retrieved automatically. Any of these fields can be overridden once retrieved.
- **Item Lookup:** Lost the tag? Easily search for items using partial descriptions, UPC codes, partial item codes, or other searches.
- "**Power Search**" allows an extra level of searching. Filter by selecting criteria, then search within those results by various options. Advanced searches allow you to filter by just about any field. For example: Find all items received today that cost $25 from vendor X.
- "**Quick Pick**" or "**Touch-Screen Buttons**" lets you quickly ring up common items and categories by choosing from a button menu. Change the color of the button and add an optional image. Put unlimited items and categories on the Quick Pick to create a hierarchical structure. Great for touch screen, but also works on non-touch screens.
- **Abbreviations** can be created for frequently used items that convert into real item codes.
- **Shortcut keys** let you quickly adjust quantities or perform other special functions.
- "**Waiting Sales**": When a customer delays at check-out, simply suspend their sale with a single keystroke while you ring up other customers, resuming waiting sales when customers are ready. Click the "Active Sales" button to cycle through all the active sales.
- **"Special Orders & Layaways**": Full support for layaways & special orders. Configure minimum deposits (managers can override). Sales Screen lists customer's outstanding layaways & orders, for status & easy payment. Follow Special Orders from sale to purchasing, to receiving, customer notification, and delivery.
- **Gift Cards (or Certificates):** Get pre-printed cards w/bar codes and/or magnetic stripes, or use pre-printed paper forms. Track by number, issue date & amount, recipient, and more. Automatic or manual numbering. Also use cards as Customer IDs. Call for Specs.
- "**Smart Returns**": Simply scan the item being returned, and then scan the bar code on the receipt to select the specific sale, which selects the customer. If there is a discount on the item, the return will reflect the discounted amount. Search for sales when no receipt.
- "**Store Credit**": Optionally issue **Store Credit** to customers for returned merchandise. Remaining Balance & Expiration date print on credit slips and partially consumed credit slips. Open credits show at top of sales screen when a customer is selected.
- **Custom Forms**: Receipts, sales slips (invoices), price tags, and more can be customized to suit the theme of your store.
- **Add Sales Notes**: Insert extra notes a.k.a. "description-only lines", or blank lines anywhere in the invoice. Rearrange existing lines.
- **Pictures**: You can upload up to 6 images and 1 thumbnail. When you scan or enter items they are immediately displayed on the Sales and Purchase Order Screens. Click on the picture to enlarge and cycle through all the images. Store and display 1 Customer picture.
- **Shipping Address**: Optional shipping address defaults to customer's shipping address, but can be changed per sale.
- **Item Count**: The total # of units on a sale is displayed on the Sale Screen and can be printed on receipts.
- **Recall & Reprint** completed sales. Recalled sales can be modified or voided at any time (with authorization).
- Put sales "**on hold**" to create quotes/estimates. Copy previous sales & modify as necessary to make a similar sale again.
- **Driver's License Capture**: Instantly capture customer information off a Driver's License by swiping or scanning 2D bar code.
- **Internal Use: In-House "Sales"** & **Donations** and other special inventory adjustments are categorized in reports for your accountant.
- View **customer purchase history** directly from Sales Screen.
- Option to **view total cost & profit margin** for current sale. This can be helpful when negotiating discounts.
- **Add new** customers, inventory items, inventory categories, and vendors directly from the Sales Screen, or open separate screens.
- **No limit** on the number of line items on a sale or different tender types (cash, check, etc.)
- **Custom payment types** for special transactions such as "Trade", or "Store Bucks".
- Optional **cash drawer** automatically opens at end of sale (for selected payment types) or **Quick-Open Drawer** at any time.
- Pole Displays ("**Customer Displays**") allow customer to see items as they are rung up, as well as total due and change.
- **Price Check** feature allows you to look up prices without affecting or starting a sale. Eliminates a common excuse for voiding sales.
- **Dollar Donation feature** allows you to round up the total to the next dollar for a donation to your organization or charity.

## Sales Tax

- **Configure unlimited sales tax types**, each with its own tax rate (with up to 3 decimal places).
    - Options for jurisdictions with more advanced rules, such as minimum thresholds and rounding up, down or nearest.
    - Option to have prices include sales tax. ("Real" sales price is back-computed by subtracting tax from visible price.)
    - Handles special cases for Canadian dual taxes and others.
- Each **inventory** category can be set to one of the tax types, to non-taxable, or to non-sales (non-sales income w/no tax).
    - By default, sub-categories inherit this setting from their parent categories.
- Mark specific customers as tax exempt or to use a specific tax type, or individually override tax type at point of sale.
- Tax amount computed by applying rate to subtotals for each tax type, avoiding round-off errors.
- Tax summaries in Day-End and Monthly Sales Reports include breakdown by tax type of total taxable sales amount, total tax-exempt amount, and total tax collected (for each month), with subtotals by tax exemption type and non-taxable category.

# Inventory Control

- **Track Inventory** from end to end with purchase requests, purchase orders, receiving, sales, layaways, and returns. View the entire history of stock changes for any inventory item code. Inventory quantities always available in real-time.
- "**True Costing**": Calculates Cost of Goods Sold (COGS) by FIFO (First In, First Out).
- **Associate** each inventory item code (SKU) with an inventory category, a preferred supplier (vendor), and optionally a manufacturer.
- **Department/Category Structure:** Define your own multi-level category scheme, with up to 9 levels of sub-categories. Reports can summarize sales by category, with roll-ups to a specific level.
- **"Product Variants"** (a.k.a. Color/Size Grid) – Lets you easily manage collections of similar products. Multiple templates with up to 9 attributes (Size, Color, etc.) each. No limit on the number of choices per attribute. Choices appear in pop-up menus when base product code selected (or scanned) in Register. Any base product can use any template. Price, cost, etc. can be set individually for each variant, or can be set to automatically track changes in the base product. (Requires 4.1 and the Advanced Inventory Module.)
- "**Work on the Fly**": Add or modify inventory items, categories, and vendors on the fly from any item selection screen.
- **No practical limit** on number of inventory items, categories, vendors, or manufacturer/publishers.
- Full **alphanumeric** codes for inventory items, categories, and vendors (up to 25, 20, and 10 characters, respectively).
- **Numbering:** Choose new codes manually or let the program pick the next available number (or other style code) for you.
    - 9 automatic **item** coding schemes available. 2 vendor coding schemes (including Vendor Initials).
- **Inventory defaults** settings allow for quick entry of new inventory. Copy function lets you make similar records even faster.
- **Item Lookup:** Inventory retrieval by bar code, item code, description, category, or vendor enables fast and easy lookup.
- **Power Search** feature when searching for items on a sale or in item lists allows filtering of items by common fields or advanced filters allow filtering by almost any field. Then add a secondary search by another field such as description, and so on.
- Store **product pictures** to display from Sales or PO or while viewing an Item Record. Pictures appear as items are scanned/entered on a sale. Click on the image to open viewer to cycle through up to 6 images. Will later be used for online store in a future 4.x release.
- **Item Record Screen** lets you easily view and edit all the fields in the item record. Organized by tabs for easy access.
- **Case Quantities** let you order merchandise by the case (or box, roll, etc.) but sell individual pieces.
    - Piece cost is automatically computed from the case cost and case size (accurate to 3 decimal places).
- Place a **Pop-Up Note** on an inventory item, for up-sell or other reminders. Appears in Sales Screen & on POs when item is rung up.
- **Merchandise Tags:** Print merchandise labels with or without bar codes and/or graphics. Print labels when merchandise is received, for a single item, or groups of items matching certain patterns.
- **Built-In WYSIWG Label Designer (for advanced users)** allows complete customization of Item, Vendor, and Customer Labels, with or w/o bar codes. Drag & drop fields from any table or formula. Detailed formatting controls and suppression formulas.
- **Stock Shelf Location** field can be used to locate the storage bin or stock shelf for each stock item.
- Up to **9 custom fields** in each item record can be given any name you want on a per category basis. Use the Custom Fields tab or place up to 4 custom fields on the main tab of the Item Record Screen.
- **Multi-line memo** fields in item and vendor records let you keep notes for later reference , or add more details to receipt.
- **Searchable Keywords** fields in item and vendor records give you another way to organize your inventory.
- **Inventory Summary Report** by item, category, vendor or location, as of a specified date.
- **Physical Counting:** Full support for physical inventory counting using a wireless laptop with Windows or Mac OS or Tally Sheets.
- **Tracking Options:** Turn inventory tracking on or off for individual items.
- **Out-Of-Stock Warnings:** Automatic Out-Of-Stock checks can warn you when you try to sell an item with zero quantity.
- **Pending Stock Corrections:** Instead of "negative inventory", tracks sales of out-of-stock items for later resolution by manager to deduct from receiving entered later or as actual corrections for incorrect counts.
- **Item Status:** Mark items as Discontinued, Temporarily Unavailable, or Non-Stock, to force an extra confirmation before use.
    - **Discontinued** items can be hidden from search lists.

# Barcodes

- **Efficient**: Increase speed and accuracy by use of inexpensive hand held or fixed mount scanners.
    - **Most Models Supported**: Supports all popular keyboard-wedge and USB Keyboard Emulation.
    - **Beyond the Register**: Many *Artisan* program screens are optimized for entering items by scanning.
- **UPC**: You can use existing UPC codes (or other bar codes) if your merchandise comes with bar codes already on it.
    - Use Item Record's UPC field as an additional code, just scan this code into the field. (Bar codes are just a number; you still have enter the rest of the information such as description, price, etc -- unless you import data first!)
    - Unlimited Alternate Codes per Item Record. Useful when alternate suppliers use different UPC codes.
- **Print your own bar code labels** (using automatically generated bar code numbers) for products without UPC codes.
    - Enter quantities to print, or automatically print as needed for quantities of merchandise received.
- **Print Labels**: Two types of ways to print labels:
    - Print individual labels, using specialized label printers (***recommended***).

- Print full sheets of labels using a laser or ink jet printer.
- **Built-In WYSIWG Label Designer (for advanced users)** allows complete customization of Item, Vendor, and Customer Labels, with or w/o bar codes. Drag & drop fields from any table or formula. Detailed formatting controls and suppression formulas.

## Integrated Payment Processing

### (Requires Secure Payment Processing Module, FREE with New Merchant Account)

- **Integrated**: Authorize payments (e.g. credit/debit cards) through *Artisan*. Requires purchase of an **EMV-Capable Credit Card Terminal**. Supported devices must be obtained from CerTek or a supported partner.
- Support for **EMV, Apple Pay, Signature Capture** & more, with supported devices and software from our Processing Partners.
- **Processing Partners**: Integrated with **Payment Logistics**, **OpenEdge** (**PayPros)**, and **Chosen Payments. FREE** integration with a *new* merchant account without any additional service fees. All you pay for is hardware and competitive customary merchant processing rates/fees without any integration costs. Restrictions/qualifications apply. Call for details.
  **OR** Bring Your Own Processor via our partner's Processor-Neutral Gateway. S/W License, Setup, and Monthly Fees Apply.
- **Secure**: *Artisan* version **4.X** is **compliant with PA-DSS** Credit Card Industry Standards.
  - Credit card numbers are always **masked** to show only allowed digits.
  - Sensitive card data (swipe data, security codes, and full card numbers) never pass through *Artisan* & are **never stored** on disk.
  - All payment transactions logged in Artisan in a log file as well as part of the sale transaction with easy batch reconciliation.
- Comprehensive: Process **Voids, Returns**, and **Voice Authorizations** directly in Artisan. Manual entry for card-not-present cases.

## Consignment

- **Specify Individually**: Mark items as consignment items; specify consignee/consignor splits instead of price markup formulas or specify specific costs; specify splits at item or vendor level. Vendors can have a mix of consignment and owned items.
- **Consignor Payout Statements** show items sold and amount due to each vendor.
  - Optionally include a list of remaining items in stock. Optionally list sold items by date sold or by customer.
  - Formatted for window envelopes, or use option to automatically print mailing labels.
  - Option to automatically export consignment statements to QuickBooks as Bills Due. Requires Artisan's QuickBooks Connector (sold separately).
- **Consignment Items in Stock Report** searchable by item code, description, etc.
- **Consignment Share**: For each consignor, choose whether split is based on standard retail price or on actual sale price.
  - List either price, or both, on Consignment Payout Statement.
  - Optionally deduct estimated credit card processing fees and/or monthly space rental fee from consignor's split.
- **Consignment Fill-In Price Model**, ideal for craft malls, allows you to create generic consignment items (typically one per vendor) that automatically move you to the description and then price fields in the Sales Screen.

## Customer Management

- **Drivers License:** Capture customer Name, Address, DOB, etc. by swiping Driver's License with a magnetic stripe or scanning 2D bar code. Supported in most, but not all states. Requires 2D bar code scanner.
- **Any Lookup Field**: Quick lookup of customers by first or last name, business name, street address, ID #, or just about any field. Save your favorite searches for quick lookups. Sound-alike option lets you find names even if you don't know the exact spelling. Power search and advanced searches let you filter by sales activity, address, or just about anything else.
- **Results Narrow as You Type**: Type only as many characters as needed to find customer in list.
- **ID Cards**:
  - Optionally use conforming bar-coded or mag-stripe ID cards to quickly identify customers.
  - Use multiple customer cards (with different IDs) for the same (family) Customer Record.
- **On the Fly**: Add or modify customer records on the fly from any customer selection screen.
- **No practical limit** on number of customers.
- **Purchase History**: Track customers' purchases and maintain sales data for many years.
- **Store Credits**: Track outstanding merchandise credit slips by customer.
- **History**: **View** customer purchase and payment history by totals or by individual transactions.
  - "YTD" (Year To Date) sales as well as total sales directly in Customer Record.
- **Edit/Add in Sales Screen**: View and edit detailed customer information from point of sale.
- **Pop-Up Note:** Tag special or problem customers with a Pop-Up Note that displays on the Sales Screen.
- **Notes:** Multi-line memo field lets you keep additional notes about customers. **9 *searchable* custom fields** for your own use.
- **Birthday field** and an Anniversary date. Per-customer shipping methods, account terms, and discounts.
- **2 Relationships** keep track of **birthdays** and **email** for 2 extra people such as spouse, friend, family member, etc.

- **Pictures:** Store customer pictures for display from the Sales Screen or while viewing a Customer Record.
- **Mailing List:** Create specialized customer mailing lists and labels. (See MAILING LIST MANAGEMENT.)

## Interface to Accounting Program

### (Requires Artisan's QuickBooks Connector add-on)

- **QuickBooks**: Optionally export Daily Sales, Inventory Summaries, Accounts Receivable, Accounts Payable, COGS, to accounting programs, such as QuickBooks®. Requires QuickBooks Feature Pack Add-On License.
    - **Flexible Control**: Configure Artisan to match your Chart of Accounts, with flexible control over level of detail.
    - **Daily or In Batch**: Once configured, export at the touch of a button, automatically during Day-End Processing, or for any range of dates. Date ranges are saved in one easy file, but are broken down daily when imported.
    - **Deposit Transactions:** Optionally Artisan can automatically enter deposit transactions, saving even more steps.

## Accounts Receivable

- **Basic Open Accounts**: Support for basic Open Accounts with aging report for occasional charges. Full on A/R Statements is currently scheduled for Artisan version 4.1, which will require the Advanced Billing Module, sold separately.

## Register Close-Out & Sales Summary Reports

- **Special tools** make end of day processing easy and efficient.
    - The **Tender Summary** screen shows expected payment totals. Easily make adjustments for over/underage.
    - **Day-End:** Automatically print or preview Day-End sales summary report w/optional detailed transaction journal.
    - **Per-Register Breakdown:** Full Day-End shows total for all registers with optional per-register breakdown.
    - **Audit:** Report lists voided sales (so you can account for all slip #s) and "no-sales" (drawer opened w/o sale).
    - **Fees:** Option to automatically deduct estimated credit card processing fees from bank deposit amounts.
- **Day-End & Month-End** reports can include breakdowns by inventory item, category, vendor, sales rep, customer, etc.
    - **Roll-up:** Sub-category numbers are rolled up into higher-level categories. Choose how many levels deep to show.
    - **Sales by Hour:** Optionally include a breakdown of sales by hour to determine optimal staff allocation.
- Optionally **export daily sales** and inventory summaries to accounting programs, such as QuickBooks®. Requires QuickBooks Feature Pack Add-On License

## Multi-Tasking & Multiple Stations

### (4 stations or more may require a true server computer)

- Multiple windows or screens allow you to have multiple tasks open at once including multiple sales, POs, Item Lists, & more. This helps to reduce the total number of stations required.
- Connect multiple Registers, Back Office Stations, Sales Desks, and Office Computers (requires additional licenses)
- Up to 99 stations **per** site can share data over a network.
    - Connect to data without using Windows File share, but through a more robust SQL database engine.
    - Artisan automatically re-connects to its data after a network failure.

## Employee Time Clock

### (Requires Deluxe Feature Pack Add-On)

- Keep track of the times that your employees are working.
- Employees **clock** in and out using a simple keyboard function and their existing *Artisan* user names and passwords.
- Managers can **view** In/Out Board showing each employee's status and most recent time in/out.
- Managers can view/edit/add/delete from list of all time clock entries for all employees.
- Report time **worked** in Employee Time Clock Detail by Date Range, or summarize in Day-End and/or Month-End Report.
- Option to **round** time worked to nearest 15 minutes, or other number of minutes.

## Import/Export

**More powerful Import/Export features coming in a future release... but for now...**

- Import Service: We can import a variety of data from various sources including other POS Systems and accounting programs. There is an hourly fee for this service, please call the sales team for details and to request a quote.
- Do It Yourself Imports: Import Items, Categories, Vendors, Customers, and Gift Card directly from Text, CSV, or DBF files.

- Export virtually any data through the custom report tool and through the SQL server. Limited **free** assistance is available during the transitional period while we wait for a future release.

## Item Pricing

- **Flexible Pricing:** Pricing can be driven from several points:
  - Set manually in each item record, or pick a specific price chart to use for that item, or
  - Inherit a pricing markup/down formula or price chart from the associated Category, Vendor, or Manufacturer record, or
  - Create special "Fill-In Price" items that prompt the clerk to fill in the price at the time of sale.
- **Flexible Discounts:** Set discount levels at the Category or individual Item record level, or use a Quantity Discount chart.
- **Discount by Amount or Percent:** Items may be discounted by a percentage or by a fixed amount, specified by Item or Category, or by using a coupon.
  - Coupons can discount by a fixed amount or by a percentage of the entire sale**.**
- **Overrides**: Price and discount overrides can be performed at the time of a sale. Discount individual items or the entire sale.
- **Sale Dates**: Schedule Sale Dates by date range for discounts at the register for Categories of items or Individual items.
- **Price by Vendor or** Category: Automatically update costs and prices for all items in a specific category or from a specific vendor. Each item can "Opt-In" or "Opt-Out".
- **Price Levels:** Supports up to 6 price levels, or "customer types," (e.g. Retail, Wholesale, and Frequent Buyer Club).
  - You pick the names for each customer type, and assign one of these types to each customer.
  - For price levels 2-6 for each Item, set price manually or using percentage markdown from Retail or from another price level. Use overall default percentage or override per Category.
  - Price levels can show on sale as discounts or as alternate prices (with option to show the Retail Price, too).
  - Set default price level per site, so each location can have different prices.
  - Each Customer can have an additional individual percentage discount off of their price level.
  - Monthly sales reports include breakdown by Customer Type (gross sales & total markdown).
- **Sales Tax in Price**: Option to have price include sales tax.

## Mailing List Management

- **Export:** Export customer information to other applications or print mailing labels directly from Artisan.
- **Interfaces** with **stamps.com™** to print postage and addresses directly on envelopes.
- **Print: Print** mailing labels on standard page printers with Avery-compatible labels, or on supported label printers.
- **Target specific customer profiles** using advanced search features. Select a list of customers by any or all of the following:
  - Customer type (e.g. Retail, Wholesale, etc, or Any).
  - Birthdays or anniversary date.
  - Purchase history for any range of dates, based on number of items, or average, max, or total purchase price.
    - Optionally narrow down to a specific item, category (including sub-categories), vendor or artist.
  - City, state/province, full or partial ZIP/postal code, or country.
  - Include or exclude customers based on Keywords found in the keyword list in the customer record.
  - The date the customer was added to your database.

## Purchasing & Receiving

- **Purchase Requests**: Create Purchase Requests to remind you to reorder, or use reorder levels to create them automatically.
- **PO from Requests**: Combine all purchase requests for a vendor into a Purchase Order automatically and adjust as necessary.
- **PO Dates**: PO starting & cancellation dates help you to control seasonal inventory better.
- **Reorders**: Quickly and easily reorder items using the vendor name or item code, with or without Purchase Requests.
- **PO screen** shows quantity already available (unreserved on-hand plus on-order) to help you decide how many to order.
- **Easy access** to full item details to make further decisions.
- **Easy Receiving**: Receiving screen shows outstanding items. Enter actual received quantities or receive all items for a PO.
- **Inventory Quantity Updates**: Received quantities automatically added to inventory.
- **Print Labels**: Automatically print merchandise labels for a whole receiving batch.
- **Receive Without PO**: You can also receive items without Purchase Orders, in a batch or from individual Item Records.
- **Item Costs**: Update product costs directly from Purchase Order & Receiving screens.
- **Large PO's**: Up to 99,999 lines per Purchase Order. No practical limit on number of Purchase Orders.

# Printing

- Completely **customizable** forms with the built-in Label, Report, and Form Designer for **advanced users**. Forms can be configured to your specific needs: sales slips (invoices), purchase orders, receipts, order forms, customer forms, labels, reports and statements. Forms can be emailed, printed directly, opened on screen, or saved or exported to PDF, Excel, and other formats. Hire CerTek to customize for you at reasonable hourly rates! Customizations are **not** included in support plans. ***Report* Designer Requires Deluxe.**
- **Six Printers:** Handles up to six printers per station. Associate specific printers with particular reports or receipts.
- **Receipt Printing:** Configurable Sales Slip Styles give you comprehensive control over the number and styles of sales slips to print, either by automatic rules or by presenting a menu at the Point of Sale.
- **Multiple Copies:** Can be set to print an extra receipt for signature when credit card payment selected or print on different forms and/or printers based on payment type (e.g. On Account), customer type (e.g. Wholesale) or other criteria.
- **Gift Receipts:** Print receipts that don't have the prices and hides coupons, merchandise returns, and note lines.
- Use an **auto**-cutter between copies, or have the program pause while you tear off each copy.
- Quick **Reprint** function automatically recalls and reprints last receipt.
- **Standard forms** for purchase orders and statements are laid out to work with single or double left window envelopes.
- **Mailing lists** and customer & vendor labels are easy to create and print.
- Most forms and reports can be previewed on the screen before printing.
- Standard forms for 40 column receipts for small receipt printers or create custom forms as needed.
- Supports most USB sheet printers and popular receipt and label printers. See "System Requirements & Supported Devices" below**.**

# LABEL PRINTERS (Recommended instead of sheets of labels)

- **Rolls of Labels**: Supports selected bar code label printers. Avoids wasting partly used label sheets.
    - You can even have two label printers (on same computer) loaded with different kinds of labels.
- **Special Tags:** Print merchandise item labels in a variety of shapes, sizes, layouts, & colors, ***including jewelry & clothing tags***.
    - Optionally include “cost codes”, printing costs in code (letters), so salesperson can have a basis for negotiation.

# Reporting

- *Artisan* **provides five** options for reports, which can all be viewed or printed from within *Artisan*:
    1. Use one of the many built-in native reports, many of which have numerous options.
    2. Get free reports from our library of custom reports that we made for other customers. Requires 60-day or monthly support. View reports from the “custom” menu inside each of the various report categories.
    3. You can contract CerTek to create a custom report for you or you can hire a third party. You can even share reports with your colleagues who also use Artisan.
    4. Create your own custom reports using the built-in Report Designer (for advanced users, **requires Deluxe Feature Pack**.)
    5. Copy an existing report to tweak it to suit your needs (for advanced users, **requires Deluxe Feature Pack**.)
- Real-time data with unlimited tracking history, item history reports and product list reports.
    - Many reports have options to subtotal and/or group by vendor, category, etc, and to limit to specific groups.
        - Sub-category numbers are rolled up into higher-level categories. You pick how many levels deep to show.
        - “Category Tree” option for summarize & group by.
            - Use “Super-Group” in addition to summarize & group by for a 3rd level.
- Inventory Change Summary shows qty sold, received & adjusted for each item in a given time period.
- **Inventory Summary** shows on-hand inventory asset totals, with optional subtotals.
- **Inventory Adjustment** Detail lists or summarizes shrinkage, breakage & other special adjustments to inventory counts.
- Print **Best or Worst Sellers** Report by vendor, category, item, or customer.
- **List outstanding** gift certificates, layaways, special orders, store credits, on-hold sales/orders, voided sales, and more.
- **List** open vs. closed **purchase orders** and outstanding or past receiving.
- Activity Reports for Inventory & Customer Records, and more.

# Merchandising Reports

- Incredibly **useful Merchandise Performance Report** that gives you detail or summary information.
- **Buy Smarter:** Powerful tools that help you buy smarter:
    - Inventory Turns, Gross Margin Return on Investment (GMROI), Initial and Maintained Markups
    - Average prices, On Order, Mark Downs, Beginning and Ending Inventory, Sales, Net Received, Gross Profit
- **Discriminate:** Filter on particular categories, vendors, items, and manufacturers.

## Auditing

- For changes that are made to inventory and customer records and many other places, you can get a complete audit trail of who changed what, when, and where. Advanced security algorithms prevent unauthorized tampering.
  - **Configurable Password Strength:** – require Strong passwords for some or all users (or none).

## Security

- Assign **passwords** and security levels to each user. Advanced security algorithms prevent unauthorized tampering.
  - **Configurable Password Strength:** – require Strong passwords for some or all users (or none).
  - **Password Aging**: Passwords can be set to expire after a set number of days. They must vary from users last 4 passwords.
  - **Lockouts:** After 6 consecutive failed password attempts, the user is locked out for 30 minutes. Administrator may override.
- Assign security levels to sensitive tasks or use Quick Security Settings to use a standard profile (Minimum, Medium, High).
- Ability to **hide costs** from employees.
- **Sensitive Credit Card information** is NEVER written to disk.

## Sales Commissions

- **Optionally** track sales commissions with a separate sales representative field from the sales clerk and from the logged in user. Include or exclude specific product categories. Customized commission reports are available at an hourly rate.
- Each **Rep** can be set up with a different commission percentage, based on either Net Sales (after discounts) or Gross Profit.
- **Commission** totals included in "Month-End" Sales by Sales Rep report section.

## Training & Support

- Ever expanding self guided training articles and videos are available free of charge.
- Training/Support is available from your Authorized Dealer or Direct from CerTek. Start off with web training from one of our top-notch specialists. We bring the training session onto your computer via the Internet, live, while you talk over the phone. Very reasonable rates! Or if you prefer, teach yourself through guided tutorials, manuals, and knowledge base articles.
- **Automated tutorials** step through common tasks.
- **Training mode** lets you practice with sample data. Copy your own real data to sample data to teach your staff & practice at any time.

## Customizations:

- **Numerous program options** allow you to tailor *Artisan* to meet your individual needs.
  - Control various aspects of program behavior and screen layouts. Select default search options for different tasks.
  - Control which fields appear in screen lists, control column widths and position. Drag columns to another position.
- Most **printed receipts**, **forms, labels, and statements** can be completely customized. Even **reports** can be customized by copying an existing report and tweaking it to suit your needs. For advanced users. See Printing above.
- Add **return policies** & other messages right from the *Artisan* configuration screens.

## Backups & Miscellaneous

- Integrated **data** backup and restore functions. Optional automatic backup reminder daily, weekly, bi-weekly, or monthly.
  - Backup data directly to USB flash disks, local hard drives, network drives, or to cloud services such as ***DropBox***.
  - Schedule automatic backups to run during the night – use in conjunction with online services such as ***DropBox*** for off-site backups.
- Supports **both** US and non-US addresses and phone numbers.
- "Go" menu & "Reports" menu allow quick navigation to key areas of the program.
- Bulk Change feature allows you to update key fields quickly such as item discounts, prices, reorder levels, & more. Update all records or use the power and advance search filters to exactly select which items get updated.

## Data Conversion & Other Services

- Get started more quickly by converting your customer and/or inventory data from your old program(s). You, Your Dealer, or CerTek can perform various data import functions.
  - If you prefer, convert your data yourself, using the Import features of Artisan. See Import/Export above.
- We can also handle Data Entry for you, call for details.
- Logo conversion for use on Receipt & Label Printers.