



THE ULTIMATE SOFTWARE CHECKLIST

for Retail & Service Businesses

Software Features	LOU [®]	Vendor 2	Vendor 3
Point of Sale (POS) & Order Management			
Configure cash drawer at open & close	✓		
Search for items by SKU, model, description, SN	✓		
Real-time item availability, location	✓		
Serial number tracking	✓		
Scan barcodes at POS	✓		
Discount by line item or order total	✓		
Issue discounts by percent or dollar	✓		
Salesperson can be attributed to orders	✓		
Apply sales tax automatically	✓		
Search for customers by name, address, phone	✓		
Add new customer accounts at POS	✓		
Receive customer payments at POS	✓		
Search for past invoices by multiple criterion	✓		
Add additional fees and charges to order	✓		
Issue store credits	✓		
Issue a refund at POS	✓		
Create and view estimates	✓		
Create an invoice from an estimates	✓		
Search for estimates by name, address, status	✓		
Place transaction on hold and recall	✓		
Print cash receipts	✓		



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Software Features	LOU	Vendor 2	Vendor 3
Point of Sale (POS) & Order Management, con't			
Print full size invoices (8.5 x 11)	✓		
Add custom Terms & Conditions to receipts & invoices	✓		
Create stages to track orders	✓		
Service Scheduling & Routing			
Service Manager Dashboard w/visibility to all jobs	✓		
Routing using drag & drop visual mapping tool	✓		
Multi-crew management	✓		
Calendar with view by crew, route or vehicle	✓		
Asset & equipment tracking	✓		
Alert when vehicles or equipment are double-booked	✓		
Mobile app for service personnel in field	✓		
Offline mode for mobile app - for remote locations	✓		
Text and/or email customer alerts - arrived, departed	✓		
Digital door hanger sent via text or email	✓		
Alert when vehicles or equipment are double-booked	✓		
Inventory Management			
Categorize inventory by product line	✓		
Store and view item number and description	✓		
Store and view unit of measurement	✓		



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Inventory Management, con't			
Store and view item documents and photos	✓		
Allow user defined fields for each item	✓		
Store and view multiple suppliers for each item	✓		
Store and view a location/bin for each item	✓		
Store and view a shipping weight to each item	✓		
Store and view a bar code number	✓		
Support item kits/groupings	✓		
Track items by serial number	✓		
Search for inventory items by multiple criterion	✓		
Track offline inventory (items not for sale)	✓		
Manual adjustment of inventory quantities	✓		
Audit trail of inventory adjustments	✓		
Integration with QuickBooks Online	✓		
Set prices based on a pre-defined margin	✓		
Display discounts on invoice	✓		
Update prices electronically from integrated vendors	✓		
Upload new items electronically from integrated vendors	✓		



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Software Features	LOU	Vendor 2	Vendor 3
Purchasing and Receiving			
Manual generation of purchase orders (PO)	✓		
Automatic sequencing of PO numbers	✓		
Track suppliers expected arrival date	✓		
Allow multiple suppliers for each item	✓		
Ability to email purchase orders	✓		
Ability to electronically submit PO to integrated vendor	✓		
View open purchase orders	✓		
View purchase order history	✓		
View sales and purchase history for each item	✓		
Automatically generate a payables entry	✓		
View customers waiting for items on PO	✓		
Track items marked as backorder	✓		
Ability to indicate drop shipping on PO	✓		
Mark items back ordered	✓		
Receive items without PO	✓		
Manage item transfers between locations	✓		
Vendor and Supplier Management			
Store multiple addresses per supplier	✓		
Store key contact information	✓		
Store Supplier notes and account numbers	✓		



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Vendor and Supplier Management, <i>con't</i>			
View/print a Vendor list report	✓		
View invoice, payment and credit history	✓		
Setup vendor categories for reporting	✓		
Customer Management and Marketing			
Store card on file via tokenization	✓		
Store and view customer type	✓		
Create pop up alerts for customers	✓		
View payment, credit and purchase history	✓		
Track lifetime purchase history	✓		
Manually override default tax	✓		
Store pictures and documents on account	✓		
Create manual follow-up action items	✓		
Create mailing lists based on purchase history, zip code, etc.	✓		
Create custom follow-up campaign streams	✓		
Employee Management			
Track and manage employee information	✓		
Record audit log of employee transactions	✓		
Assign security levels to each employee	✓		



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Software Features	LOU	Vendor 2	Vendor 3
Accounts Receivable			
Create custom payment terms	✓		
Create recurring orders	✓		
Print customer statements (single or en masse)	✓		
View aged receivables	✓		
Retain history of charges and payments for all customers	✓		
Mass process credit cards	✓		
Mass invoice customer orders	✓		
Mass email customer invoices	✓		
Accounts Payable			
Pay by due date	✓		
Pay by invoice	✓		
Apply discounts, taxes and extra fees	✓		
Add/adjust invoices	✓		
List invoices selected for payment	✓		
Add partial payment	✓		
Interface with the general ledger	✓		
General Ledger			
Maintain unlimited accounts and transactions	✓		
Track audit trail detail for an unlimited number of years	✓		
Post entry to actual date	✓		



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General Ledger, <i>con't</i>			
Flexible chart of accounts	✓		
Track/report profit/loss anytime	✓		
Drill-down from ALL financial reports to original transactions	✓		
Work Orders & Shop Management			
Create estimates	✓		
Search work orders by multiple criterion	✓		
View complete work order history	✓		
Add/view comments for each work order	✓		
Create customizable service requests	✓		
Create customizable service interviews	✓		
Ability for techs to record work completed	✓		
Allow for flat-rate pricing	✓		
Drag-and-drop scheduling calendar	✓		
Dispatch view of service calendar	✓		
Sortable list view of service calendar	✓		
Indicate arrival and departure time on job	✓		
Allow multiple technicians per order	✓		
Sort jobs by route	✓		
Integrated mobile service app for service personnel	✓		
Create recurring service orders	✓		
Auto-creation of recurring service orders and tasks each month	✓		



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Multi-store			
Single customer file across all stores	✓		
Access to all customers regardless of logged in store	✓		
View inventory information and stock levels of other stores	✓		
Ability to create purchase orders from any store (with security)	✓		
Transfer inventory from store to store	✓		
Ability to view, update and report on each stores data in real-time	✓		
Reports			
List open estimates specified date range	✓		
Real-time inventory valuation	✓		
Serial number list	✓		
Item sales and purchase history	✓		
Customer list	✓		
Customer purchase frequency	✓		
Customer purchase details for time period	✓		
Customers purchase totals	✓		
List open estimates by customer	✓		
List open orders by customer	✓		
General Ledger report	✓		



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General System Features			
All reports are viewable/configurable onscreen and exportable to print	✓		
Email and Text integration	✓		
Export reports to a spreadsheet or PDF	✓		
Master audit log of employee transactions	✓		
Hardware Support			
Cash drawer	✓		
Bar code scanner	✓		
EMV compliant hardware	✓		
Card Swipe and Dip	✓		
PIN Debit	✓		
Software Provider			
Telephone and email support?	✓		
Online training center?	✓		
Online training videos?	✓		
Dedicated onboarding specialist to assist and guide implementation?	✓		
Service level agreement (SLA)?	✓		
Multiple referrals for the product and onboarding process?	✓		