



Integration of a Point of Sale System with M3

[CONCEPT]

This document explains how an external point of sale (POS) system is integrated with M3.

Results

Outcome

Basic data, such as item, customer and price information, is downloaded from M3 to the external POS system. Sales ticket information is uploaded from an external POS system to M3. The information is processed in M3 and sales statistics, stock levels and the general ledger are updated.

Before Starting

The starting conditions listed in the following documents must be met:

- Defining Settings for Enabling POS Integration with M3 [Settings Process]
- Define Basic Settings for Enabling POS Integration with M3 [Settings Instruction]
- Define Settings for Distribution Orders to Be Transferred between M3 and POS System [Settings Instruction]
- Define a New Shop [Settings Instruction].

See the document links at the end of this document.

Description

Purpose

The main purposes of the POS integration with M3 are to:

- Manage the master files centrally in M3 (for example, the item master file or the customer file)
- Send basic data from M3 to the POS system
- Manage sales ticket information from POS
- Update sales statistics and general ledger
- Send and receive distribution orders and stock movements between the POS system and M3
- Keep track of a shop's stock level from the POS system to enable continuous replenishment.



When

The POS integration interface is designed for businesses that have a network of shops and that process most of the shop transactions in a data system other than M3. M3 is the supply chain's point of consolidation and it supports the financial components of the business as well.

How

The integration is performed via the application programming interface (API) in M3. The API makes the distribution of information between the two systems possible.

The supply of basic data to the shops is managed centrally in M3, while sales and stock movements are initiated locally in the POS system.

The POS interface usually runs on a daily or hourly basis. When you make a database change in M3 (for example, to the item master file or the customer file), you must manually update the OPTRFI and OPTRML files in M3 by downloading information via several M3 programs, such as 'POS Item. Transfer' (OPS610) and POS Customer. Transfer' (OPS615).

When the OPTRFI and OPTRML files have been updated in M3, the new information can be downloaded to the POS system.

Downloads from M3:

- Item information
- Customer information
- User information
- System table information
- Price information
- Promotion information
- Distribution orders (DO) (expected receipts at the shop)

Uploads to M3

- Distribution orders (actual receipts) and DOs initiated by shop
- Sales ticket information

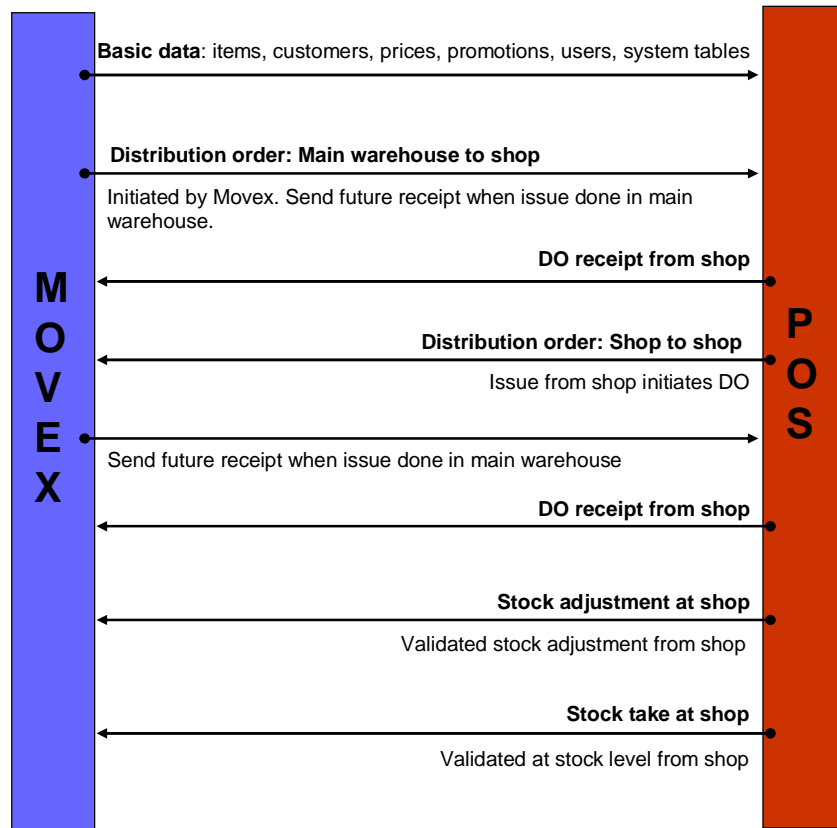
Once the information is uploaded to M3, it is used to update sales statistics, stock movements (from sales) and the general ledger.

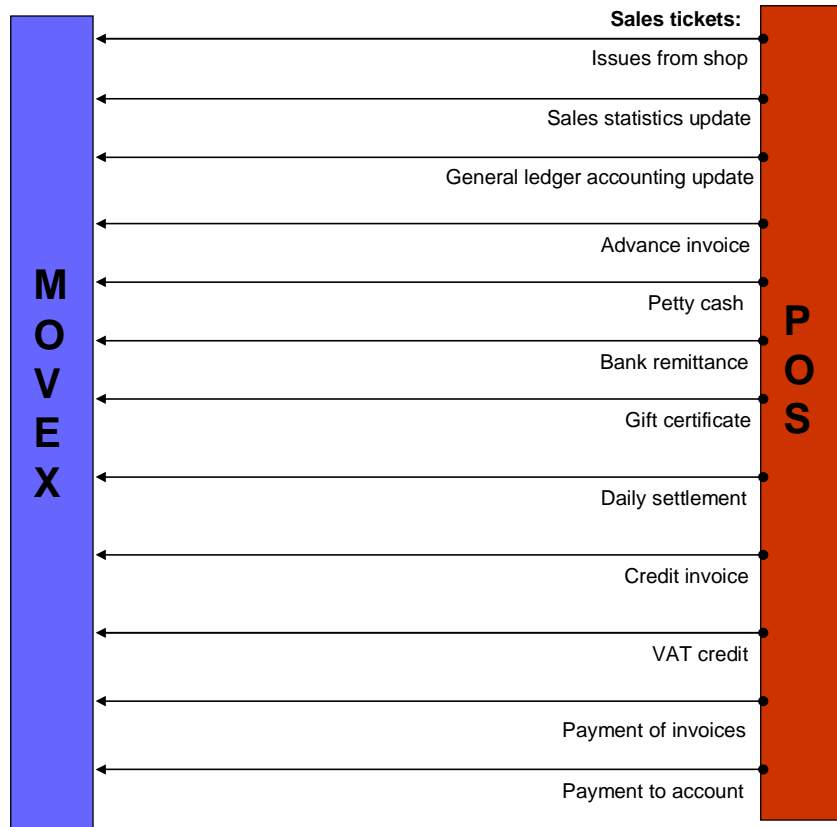
- For information on stock takes and stock adjustments, refer to Warehouse Integration [Concept] in the Handling Warehouse Integration process.



Structure

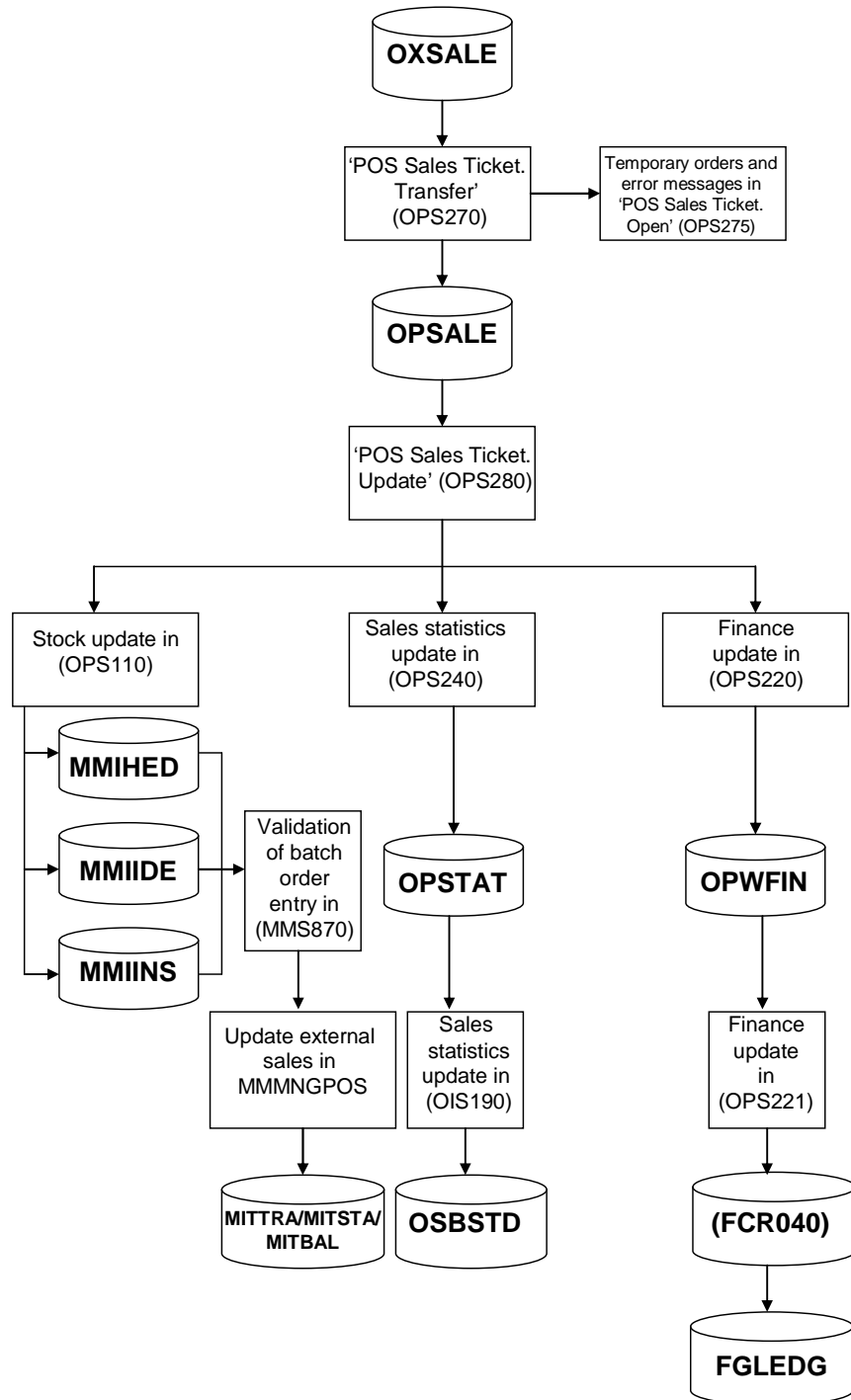
The main exchanges between M3 and the point of sale system are the following:







The Structure of the Sales Ticket Interface



See Also

Processes

- [Managing Integration of an External Point of Sale System with M3](#)



- [Creating a New Shop in M3](#)
- [Creating a New Assortment in M3](#)
- [Uploading Sales Ticket Information to M3](#)

Instructions

- [Transfer Sales Tickets from OXSALE to OPSALE and Validate](#)
- [Correct Errors that Occur during Sales Ticket Validation](#)
- [Update M3 General Ledger with Sales Ticket Information](#)
- [Update M3 Stock with Sales Ticket Information](#)
- [Update M3 Sales Statistics with Sales Ticket Information](#)
- [Download Item Information from M3 to an External POS System](#)
- [Download Customer Information from M3 to an External POS System](#)
- [Download Promotion Information from M3 to an External POS System](#)
- [Download Sales Price List Information from M3 to an External POS System](#)
- [Download System Table Information from M3 to an External POS System](#)
- [Download User Information from M3 to an External POS System](#)

Settings Process

- [Defining Settings for Enabling POS Integration with M3](#)

Settings Instructions

- [Define Basic Settings for Enabling POS Integration with M3](#)
- [Create a New Shop](#)
- [Define Settings for General Ledger Update in M3](#)
- [Define Settings for Stock Update in M3](#)