SmartHQ to ADM Functionality Comparison

SmartHQ to ADM Feature Comparison

Purpose

The purpose of this document is to show you a comparison of the functionality in SmartHQ with the equivalent functionality in ADM.

SmartHQ to ADM

SmartHQ	SmartHQ Feature	ADM Equivalent
Administration		
Manage Locations	A list of sites. • Click a site to manage its details.	1. Click the **Location** tab to see all locations. 2. Click on a **location** to see its devices and location information.
Manage Web Users	A list of web users. • Add a new user or click an individual user to manage their account.	1. Click **Admin**. 2. Click **Users and Roles**. You can manage and create web users from this screen.
Manage Kiosk Users	A list of kiosk users. • Add a new user or click an individual user to manage their account.	1. Click **Admin**. 2. Click **Users and Roles**. 3. Create an account and **generate a PIN** to use on the kiosk. You can manage and create kiosk users from this screen. Under **Manage User and Roles**, the **Driver Permissions** are considered Kiosk Users in ADM.
Kiosk Sync Log	A list of events. • Can be filtered by location, type, date and sync success or failure.	Click the **image of a bell** in the upper right corner.
Manage Reason Codes	A list of reason codes. • Add a new reason code or click an individual code to manage its details.	1. Click **Admin**. 2. Click **Reason Code**.

Manage Notifications	Notifications by site – • Kiosk offline – can adjust time frame and email recipient • No sale – can adjust time frame and recipient • No credit batch – recipients	Click the **mail image** in the upper right corner.
SmartHQ	**SmartHQ Feature**	**ADM Equivalent**
365 Help Documents	Help and support material.	Click the "**Help**" link at top, right to go to the HelpCenter.
Customer Service		
Customer Transactions	A list of individual customer totaled transactions. • Can be filtered by list, location and date range. • Report is exportable. • Click on a customer transaction for more details.	1. Click **Admin**. 2. Click **Consumer Search**. **Note:** An ID, name, or email is NOT required when searching. 3. Click on a **consumer account** to get details on their transactions. Use the red action button to export the list of consumers you found in your search.
Customer Information	A list of customers. • You can search the list by location, active or inactive. • Report is exportable. • Click the **customer's name** to see their details.	1. Click **Admin.** 2. Click **Consumer Search.** **Note:** An ID, name, or email is NOT required when searching.
Credit Transaction Log	A list of credit card transactions. • Can be filtered by location, charge or credit. • Report is exportable.	1. Click **Reports.** 2. Select or search **Credit Transaction** from the drop-down menu.
Account Funding Summary	Displays aggregate funding by location and date. • Line items are expandable. • Report is exportable.	1. Click **Reports.** 2. Select or search **Account Funding** from the drop-down menu.

Cancel Report	Contains canceled transactions by location and date. • Double-click to open line items. • Report is exportable. • Images of cancelled transactions can be printed.	1. Click **Reports.** 2. Select or search **Cancel Report** from the drop-down menu. 3. Click **cancelled transaction** to view an image of the transaction.

SmartHQ	SmartHQ Feature	ADM Equivalent
Transactions		
Sold Detail	Transactions displayed by site, date, and payment method. • Double-click a transaction for more detail. • Report is exportable.	1. Click **Reports.** 2. Select or search **Sold Details** from the drop-down menu.
Sold Summary	Sales displayed by category, date, location, and total per product. • Report is exportable.	1. Click **Reports.** 2. Select or search **Product Sales** from the drop-down menu. 3. Set the parameters. 4. Run the report. 5. Export it.
Sold Totals Summary	Displays aggregate sales totals by site and date. • Report is exportable.	1. Click **Reports**. 2. Select or search **Daily Sales Summary** from the drop-down menu.
Sold Item COGS	COGS displayed by item. • Can be filtered by location and date. • Report is exportable.	1. Click **Reports**. 2. Select or search **Sold Item COGS** from the drop-down menu.
Cash In Summary	Total report of cash received by site and date. • Report is exportable.	1. Click **Reports**. 2. Select or search **Cash Audit** from the drop-down menu.
Cash In Detail	Transactional report of cash received by site and date. • Report is exportable.	1. Click **Reports**. 2. Select or search **Cash Audit** from the drop-down menu.

Cash In Kiosk Report	Cash out report by site and date. • Report is exportable. • Report gives an accounting of who cashed out.	1. Click **Reports**. 2. Select or search **Cashout Log** from the drop-down menu.
Financial Summary	Displays financial breakdown totals. • Can be filtered by site and date. • Credit, cash, account, totals, etc., are NOT exportable.	1. Click **Reports**. 2. Select or search **Financial Summary** from the drop-down menu.

SmartHQ	SmartHQ Feature	ADM Equivalent
Sales Analysis	Displays sales totals by product. • Can be filtered by location, date and category. • Can be grouped by item and location. • Report is exportable.	1. Click **Reports**. 2. Select or search **Product Sales** from the drop-down menu.
Promotion Analysis	Displays promotion activity by location and date. • Report is exportable.	1. Click **Reports**. 2. Select or search **Promotion Analysis** from the drop-down menu.
Financial	Shows site specific financials. • Can be filtered by location and date. • Report is exportable.	1. Click **Reports**. 2. Select or search **Financial Canned Report** from the dropdown menu.
Transaction	Shows transactional totals. • Can be filtered by site and date. • Report is exportable.	1. Click **Reports**. 2. Select or search **Transaction Canned Report** from the dropdown menu.
Account	Shows the total of accounts by site and activity range, quantity and total funds. • Report is exportable.	1. Click **Admin.** 2. Click **Consumer**. **Note:** ID, name, or email is NOT required when searching.
Product	Displays sales by product. • Can be filtered by location and date. • Report is exportable.	1. Click **Reports**. 2. Select or search **Product Canned Report** from the dropdown menu.
Manage Items		

Manage SKU	Used for product management. • Can be filtered by site, type, active or inactive buttons. • Double-click item to manage it. You can: ○ add an item ○ export an item ○ import a template ○ make tax adjustments	1. Click **Product**. 2. Click **Global Product**. 3. Click the **desired product**. 4. Adjust as needed. This is also available at the location level. 1. Click on the **location**. 2. Scroll down the ***Location Summary*** page and click the **Product** tab.

SmartHQ	SmartHQ Feature	ADM Equivalent
Add New SKU	Same as "Manage SKU" except this option displays a blank entry screen for an individual product.	1. Click **Product.** 2. Click **Global Product**. 3. Click **Create New** button in the top right. 4. Enter the **item information**.
SKU Quick Edit	Can make mass edits to a product. • Filter by any item or location identifier: ○ Click **Edit** ○ Make adjustments ○ Click **Save**	1. Click **site** from the **Locations** tab, scroll to the bottom. 2. Click **Products**. You can do price, pars, and pick action from this screen
Manage Promotions	Can manage, add or deactivate promotions by site.	1. Click **Admin.** 2. Click **Promotions.** 3. Click **Manage Existing** or click **Create New** to implement. Promotions available for this product are: • *Tender/On-Screen* – RT, V5, Nano, 365Pay • *Bundle* – V5, Nano, 365Pay
Inventory Management	Can adjust quantities on hand by location. • You can do inventory and reason adjustments from this screen.	1. Click **site** from the **Locations** tab. 2. Scroll to bottom and click **Inventory**.

SmartHQ to ADM Feature Comparison

Inventory		
Pick List	Used for picklist management. • Affected by Lightspeed integration. • Select items and quantity to push to market or Lightspeed. • Report is exportable.	1. Click **Products**. 2. Click **Pick Lists**. 3. Choose a location(s) on the left. 4. Click **Refresh**. 5. Click **Push to Inventory** when you are ready to update inventory. **Note:** If you are using Lightspeed, it will say **Send to Lightspeed**.
Inventory Analysis	Displays inventory totals. • Can be filtered by location, type, active, inactive, and item pedigree. • Report is exportable.	1. Click **Reports**. 2. Select or search **Inventory Analysis** from the drop-down menu.
SmartHQ	**SmartHQ Feature**	**ADM Equivalent**
Inventory Summary	Same as "Inventory Analysis" but without the *Item Type* column in the report. • Report is exportable.	1. Click **Reports**. 2. Select or search **Inventory Value Summary** from the drop-down menu.
Entry Summary	Can add items to a market. • Can be filtered by item type, reason, date and location. • Report is exportable.	1. Click **Reports.** 2. Select or search **Entry Summary** from the drop-down menu.
Delete Summary	Can removed items from a market. • Can be filtered by item, type, reason, date and location. • Report is exportable.	1. Click **Reports**. 2. Select or search **Delete Summary** from the drop-down menu.
Variance Analysis	Displays a variance report. • Can be filtered by location and date. • Report is exportable.	1. Click **Reports**. 2. Select or search **Inventory Variance** from the drop-down menu.
Home Screen / Dashboard		
Online/Offline	Status arrow shows if a device is online or offline.	Click **Locations**. The *Devices* column will show offline or online statuses.

Location List	List is sortable.	Click **Locations**. The *Location* column will show all sites in that organization.
Sales	Displays the current daily sales.	Click **Locations**. The *Daily Revenue* column will show all sites in that organization.
Transaction Count	Displays the transaction count.	Click **Locations**. The *Daily Transactions* column will show all sites in that organization.