



# MASI Retail Portal™

## MASI Retail Portal

- Retail Portal NAV Basic
- Retail Portal RMS Basic
- Centralized Purchasing & Warehousing
- Customer Management

- Manage Inventories Centrally
- Capture and Upload Sales Transactions
- Capture and Upload Deposits and Inventory Transactions
- Manage Store Replenishment Centrally
- Issue Purchase Orders Centrally, Receive Locally

### System Requirements:

Microsoft Dynamics™ NAV  
Microsoft Dynamics RMS  
Microsoft SQL Server



The **MASI Retail Portal** connects **Microsoft Dynamics™ NAV** (formerly Microsoft Navision) and **Microsoft Dynamics™ RMS** with a robust, bi-directional, transaction-level connection methodology suited to complex retail environments with multiple store locations.

The Retail Portal is comprised of four granules – Retail Portal NAV Basic, Retail Portal RMS Basic, Centralized Purchasing and Warehousing, and Customer Management. The granules are available separately, and build upon one another for clients with differing requirements.

Retail Portal NAV Basic and RMS Basic (two separate granules that work together):  
These granules handle transactions captured in RMS and uploaded to NAV:

- Sales Journal Posting – transaction records are imported into NAV and posted via the sales journal.
- Item Sales Journal Posting – inventory level sales transactions are imported and posted through the item journal.
- Deposits – transactions are combined based on user definitions for easy reconciliation and posting through the use of Retail Deposits.
- Items / Vendors – both items and vendors are set up and maintained in RMS and imported into NAV.
- Purchase Orders – received quantities are imported into NAV as Purchase Orders and are automatically received.
- Inventory Transactions – other inventory transactions are imported and posted through the item journal.

Retail Portal Centralized Purchasing and Warehousing Granule:

This granule enhances the basic functionality in the following areas:

- Purchase Orders – Purchase Orders can be generated in NAV and exported to RMS for receipt in HQ or at designated stores. Once they are received, the transactions are imported from RMS and matched back to the Purchase Order. Specific custom fields show RMS Over and Under receive quantities to make reconciliation easier.
- Vendors – Vendors can be maintained in NAV and exported to RMS.
- Transfer Orders - Designed for companies that wish to manage one or more central warehouses, this granule allows the head office to purchase in volume and distribute to the stores through stock transfers. NAV replenishment functionality can also be used in this manner to reduce inventory levels and increase turns.

Retail Portal Customer Management Granule: (FUTURE)

This granule builds on the previous two granules:

- Maintain Customer Information - Customers can be created or managed in both NAV and/or RMS. New or changed customer information is then shared between the two systems and reconciled to maintain consistency. Very similar to the Vendor process above.
- Sales on Account – Designed to allow for selling product to a customer on account at the RMS store register. The sale is then processed in NAV with the receivable visible under the customer account.
- Sales Orders - Sales Orders created in RMS can be exported to NAV for shipping and tracking purposes. This information is then deleted in RMS to avoid duplicate shipments. The process for importing sales orders can also be used for receiving open sales from a web site, kiosk, or other external order processing system.

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