

White Paper

simPRO Point of Sale

simPRO Point of Sale

POS (or Point of Sale) software is the software retailers and hospitality businesses use to process sales. Point of Sale is a broad term that can encompass merchandising aids, displays and devices to conduct transactions in a store such as a cash register, computer and barcode scanners.

These these days it includes mobile devices such as the iPad.

Service organisations however, wouldn't need a cash drawer or receipt printout in the field. They may want a device such as a laser or thermal printer to print their service invoices, however they would also need appropriate POS software in the field to be able to produce that invoice. So POS software and devices can vary greatly based on the requirements and environment the business is operating in.

In today's world, at the core of any POS system is POS software. That should not detract from the importance of needing good hardware to manage the process. That hardware should be fit for purpose. For example, in the field you may use a tablet or smartphone coupled with a laser printer in the van. In a retail store, you may use either of these devices or a POS terminal. If you're in the field or conducting transactions out on the showroom floor instead of at a traditional cash register this is unlikely to be the case. Laser scanners work faster, have a greater range and can also read barcodes around corners on bags, boxes, bottles, tubs and irregular shapes much better than a CCD scanner can.

A purpose-built POS system for service companies can also provide the business with a wealth of information about the transactions it is recording. It can provide greater transparency on which areas of the business are running the most profitably and what the profitability of individual service technicians is. It can also allow the data to be compared across different date ranges or business units easily. The system should also tie into your inventory management system in order to keep everything balanced.

When organisations need to conduct transactions in the field, a specialised solution is required. When service companies are making these transactions at the point of sale, more complex considerations are needed than if they were processed in an office. Unlike a retail sale, when creating invoices in the field, technicians need to account for how much of their time is used, the type of time, plant and equipment usage and the materials required to complete the job. It's because of this that the majority of service companies bring the complexity of invoicing back into the office. However, with highly specialised tools configured correctly, the service technician is not required to know what the prices for these components are.

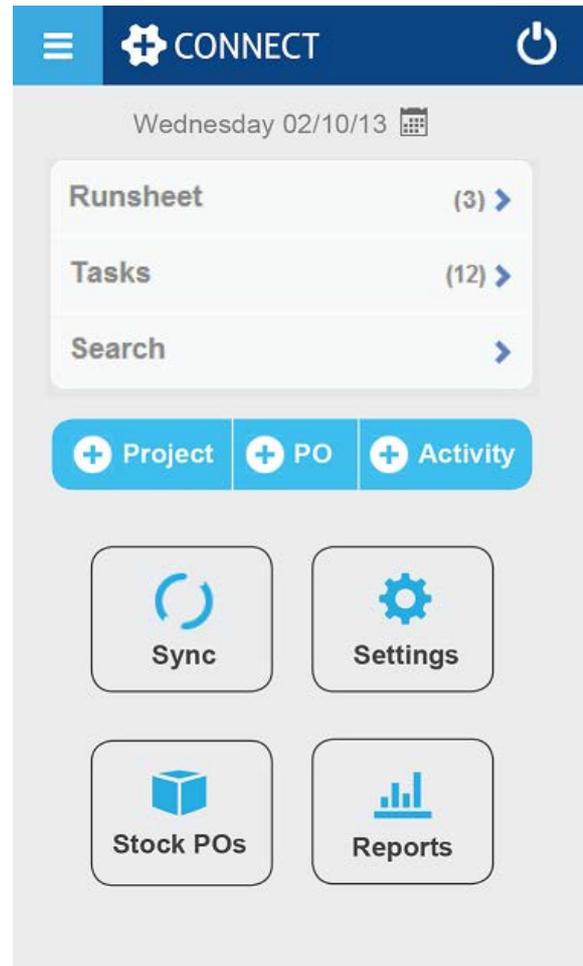
simPRO Connect and POS

simPRO Connect is the field mobility solution that works with simPRO Enterprise. It works on Android, iOS and Windows 10 devices allowing users in the field to transact with the customer in real time. With simPRO connect, the job time, materials and other important information are gathered as the job is progressing in the field.

When the job has been signed off and completed, this information is reported back to the main office system. simPRO Connect then allows the user in the field to produce the invoice based on the information and rules created for that particular customer.

If there is connectivity to the main office system (ie. the field user has an internet connection), simPRO Connect will create the invoice and apply the appropriate labour rates and markups for the customer and the job. It will also allow the user to print the invoice and then take the payment from the customer on the spot.

If the user receives the payment by credit card, simPRO Connect will process the credit card transaction in the field and report to the user the outcome of the transaction. This information can then easily be produced for the customer and emailed directly to them.



simPOS

simPOS is a lightweight and easy to use POS system, which has been specifically designed for service companies that also have a showroom. For these service-centric businesses, the showroom is often a secondary or supporting aspect to the business. As a result, the systems implemented are usually geared towards the service side of the business. They can be very cumbersome in a POS retail environment or they are disconnected so they function well, but do not read and write the same information the other side of the business is running with.

A screenshot of the simPOS login interface. It features a light blue header with the simPOS logo. Below the header is a white login form with two input fields: "Username" (highlighted in yellow) and "Password". A blue "Login" button is positioned at the bottom right of the form. The entire form is set against a dark blue background.

By logging into this software you are agreeing to the licence agreement shown here

simPOS is a web-based front end for simPRO Enterprise. simPOS is a point of sale system that processes the job, allocates the stock and creates everything in the background to comply with standard simPRO Enterprise workflows. It allows the user on the front end to simply scan or choose what they are selling and then process the transaction.

The functionality of simPOS includes:

Shopping and Selling

Users on the shop floor are able to browse through allowed sections of the standard simPRO Enterprise catalogue or scan the barcode of an item that has been presented. By scanning the barcode of the item or selecting it, the item is placed into the cart. Items can be added to the cart multiple times which will increase the quantity, or can be removed. The entire sale can also be postponed for later retrieval.

POS
ADMIN
⚙️
LOGOUT

Pos

POS / Air Movement & Heat >

Group Stocklist

- Ceiling Fans >
- Down Rods >
- Duct Exhaust >
- Exhaust Fan >
- Louvre Grill >
- Remote Control >
- Strip heater >
- Wall Fans >

Back Next

⛔ Cancel
⏸ Postpone
➔ Checkout

CART

MER GRANGE 130CM WHITE CEILING FAN - FC030134WH
Qty: 1.00 £360.00 Add | Minus £360.00^X

CONTEMPORARY 4B WHITE E27 L/HOLDER - CON52E27WH
Qty: 1.00 £237.50 Add | Minus X £237.50

CONTEMPORARY CEILING FAN 4B+LIGHT WHITE - CON52LWH
Qty: 2.00 £201.38 Add | Minus X £402.75

SUB-TOTAL: £1,000.25

TAX: £200.05

TOTAL: £1,200.30



Track Inventory

simPOS ties into the main inventory system used by simPRO Enterprise. By default, the POS is configured to draw from a default storage device. This means that a user browsing the catalogue can see the amount of an item left in stock and where, and whether any is coming in on purchase orders. If an item is scanned and sold in the POS without any stock, simPOS will either allow negative stock or do a stocktake in the background before taking it back out again. Time for a full stocktake.

POS
ADMIN
⚙️
LOGOUT

Pos

❌ Cancel
⏸ Postpone
➔ Checkout

POS / Air Movement & Heat / Ceiling Fans >

MER GRANGE 130CM WHITE CEILING FAN FC030134WH In Stock: 15 On Order: 0 £360.00 <small>Cambridge Warehouse: 15.00</small>	+
48"WHT CEILING FAN ALUM.BLADE ACES48AL/WE In Stock: 0 On Order: 0 £56.19	+
JTC SENTOSA C/FAN 120CM 4B RATTAN WHITE 1204WH In Stock: 0 On Order: 0 £108.33	+
CONTEMPORARY 4B WHITE E27 L/HOLDER CON52E27WH In Stock: 27 On Order: 0 £237.50 <small>Cambridge Warehouse: 27.00</small>	+
MER GRNG 1300 L 2X20W B22 CFL 4B BS C FN FC032134BS In Stock: 0 On Order: 0 £332.45	+
CONTEMPORARY CEILING FAN 4B ALUMINIUM CON52AL In Stock: 0 On Order: 0 £260.23	+
CONTEMPORARY CEILING FAN 4B+LIGHT WHITE CON52LWH In Stock: 4 On Order: 0 £201.38 <small>Cambridge Warehouse: 4.00</small>	+
VIKING 1200MM 4B CLIPPER REV WHITE 48453720WH In Stock: 0 On Order: 0 £227.50	+

CART

MER GRANGE 130CM WHITE CEILING FAN - FC030134WH	
Qty: 1.00	£360.00 ^X
£360.00 Add Minus	
CONTEMPORARY 4B WHITE E27 L/HOLDER - CON52E27WH	
Qty: 2.00	£475.00
£237.50 Add Minus	
CONTEMPORARY CEILING FAN 4B+LIGHT WHITE - CON52LWH	
Qty: 1.00	£201.38
£201.38 Add Minus	
SUB-TOTAL:	
	£1,036.38
TAX:	
	£207.28
TOTAL:	
	£1,243.65

Checkout

When the user follows the sale through to the checkout the contents of the customer's cart will be displayed along with their details for use on the invoice.

These details are also normally defaulted, though if the user is selling to an account customer, they may wish to put the invoice in the account name. Users can then apply discounts to the level they have been authorised for. If required, users can also add labour lines to the invoice from the checkout.

ASSIGN *(Optional)*

Customer:

Site:

Order Number:

Salesperson:

Description:

[Add Labour Row](#)

Part No.	Description	Storage	Cost Centre	Qty	Discount	Price	Sub
							Total
FC030134WH	MER GRANGE 130CM WHITE CEILING FAN - FC030134WH	Default	Default	1.00	0%	£360.00	£360.00
CON52E27WH	CONTEMPORARY 4B WHITE E27 L/HOLDER - CON52E27WH	Default	Default	2.00	0%	£237.50	£475.00

Sub-Total: £835.00

Tax: £167.00

Total: £1,002.00



Payment

When completing the transaction users can select which payment methods are being used and how much is being tendered for each payment method, including what is to go onto the account.

The screenshot shows the 'Checkout' screen in simPRO. At the top, there is a search bar and navigation buttons for POS, ADMIN, and LOGOUT. Below the search bar, there are four action buttons: Back, Cancel, Postpone, and Complete. The 'PAYMENT METHOD' section on the left lists Cheque, MasterCard, Visa, Cash, and On Account, each with a radio button. The 'SUBMIT' section has an 'Amount:' label, an input field, and an 'Add' button. On the right, a summary table displays the following information:

This Sale:	£835.00
Cash: 05-08-2014 06:33:30	£1,010.00 ✖
Sub-Total:	£835.00
Tax:	£167.00
Total:	£1,002.00
Unpaid:	£0.00
Change:	£8.00

When completed, simPOS will produce an invoice for printing, indicate how much change is due and process all the necessary functions in simPRO Enterprise to complete the sale.

The screenshot shows a confirmation dialog box titled 'TRANSACTION SUBMITTED'. On the left, it lists the following actions: Job Created (27148), Invoice Created (175698), and Payment Created (102). On the right, there are four buttons: Print Docket Receipt, Print Itemised w/ Prices Invoice, Print Description Invoice, and Back to POS.

Reports

simPRO Enterprise provides an extensive list of reports that give businesses transparency on how the business is tracking in different business units and resources. It runs specific reports related to POS, such as a report showing the day's takings, then allowing users to create deposit slips.



POS ADMIN  LOGOUT

Admin

Today's Takings Invoices

TODAY'S TAKINGS

Payment Method	Amount
Cash	£4,008.00
TOTAL	£2,004.00

simPOS has been built with touchscreens in mind and, being browser based, simPOS can be run on anything from an iPad on the shop floor to a POS terminal complete with a barcode scanner and cash drawer. Regardless of which device simPOS is run on, the only requirement is a modern web browser and an internet connection. Due to its design being geared to run on touch screens we provide recommendations on specific devices it can be used with.