

SmartPOS

360° Business Solution

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1. Why SmartPOS?

- Offline mode and Cloud support
- Customization according to your business needs
 - Localization
 - Invoice types
 - Invoice templates – Sales
 - Invoice templates – Purchases
 - Inventory fields
 - Stores
 - Shifts
 - Categories
 - Customers
 - Vendors
 - Taxes
- User-friendly/ Easy-to-use
- Shortcut keys for quick operations
- Import data function for data migration from existing software to SmartPOS
- Data security (Permissions)
- Covers all operations of business (Inventory Management, Purchases, Sales, Receivables, Payables, Cash Management)
- Improved business processes and enhancement in efficiency
- Accuracy of data and reduced error rate
- Check on employees (User ID)
- Store-wise and Consolidated Reporting.

Keep a check on your business from anywhere in the world!

Revenue generation and brand building

- Customer accounts
- Loyalty points

2. Offline mode and Cloud support

SmartPOS is a powerful combination of a desktop application and a cloud-based system. It operates seamlessly with an active internet connection. In the event of an internet outage, the system continues to function locally, ensuring uninterrupted operations. However, online access to the system will be temporarily unavailable. Once the internet connection is restored, the databases on individual computers automatically sync with the online database, allowing users to access and manage the system from anywhere in the world.

3. Customization (according to your business needs)

3.1 Company Information

- Logo
- Address
- Website
- Email

- Mobile Number
- Landline
- License Number
- STRN
- Sales Tax QR Code
- NTN
- Bank Details

3.2 Localization

- Thousands separator
- Currency Name
- Currency Code
- Currency Symbol
- Currency Decimals
- Tax Decimals
- Quantity Decimals
- Rounding Off

3.3 Invoice Types

3.3.1 Sales

- Sales Invoices
- Gifts/ Samples (Quantity will be deducted from Inventory, No Cash, No Sale Price, No Discount)
- Issues/ Consumption (Quantity will be deducted from Inventory, No Cash, No Sale Price, No Discount)
- Quotations (Quantity will not be deducted from Inventory, No Cash)
- Estimated Bills (Invoice will not have Logo and Company Name)
- B2B Sales Invoice
- Sales Returns

3.3.2 Purchases

- Purchase Orders (All fields will be fetched on Receiving and these will be editable there)
- Receivings (If a purchase is made without a PO, relevant fields will have to be input)
- ~~Loose Receivings (Only for Pharmacies)~~
- Purchases Returns

3.4 Invoice Templates

3.4.1 Sales Invoices – On POS Screen

- Seller's Information
 - Company Logo
 - Company Name
 - Address
 - Website
 - Email
 - Mobile Number
 - Landline
 - ~~License Number (for selected businesses only)~~
 - STRN
 - Sales Tax QR Code
 - NTN

- Customer's information

- Name
- Address
- Phone Number
- ~~License Number~~
- Ordered By
- Booked By
- Delivered By

- Invoice information

- Title
- Number
- Reference
- POS Number
- Date and Time
- Cashier (with User ID)

- Table with multiple columns for individual items sold

Sr. No.	Item	Batch No.	UoM	Qty.	Rate w/o Tax	Amount w/o Tax	Tax	Discount		Amount with Tax	Avg. Purchase Price	Salesman's commission
								Rs.	%			

- Sales summary and cash/ payment details

- Select Customer
- Select Payment Mode
 - Cash
 - Credit Card
 - Bank Transfer
 - JazzCash/ EasyPaisa
 - CoD
 - Credit Sale

- Text area for:

- Terms & Conditions
- Instructions/ Notes
- Return & Refund Policy

3.4.2 Purchase Invoices – On POS Screen

- Buyer's (our company) Information

- Company Logo
- Company Name
- Address
- Website
- Email
- Mobile Number
- Landline
- ~~License Number (for selected businesses only)~~
- STRN
- Sales Tax QR Code
- NTN

- Vendor/ Distributor's information

- Name
- Address
- Phone Number

- Purchase Order Information

- PO Number
- Date
- Indent/ Requisition Number
- Date
- Quotation Number
- Date
- Delivery and Payment
 - Delivery Place
 - Delivery Frequency
 - Delivery Date
 - Payment Terms
- POS Number
- Date and Time
- Purchaser (with User ID)
- Table with multiple columns for individual items sold

Sr. No.	Item Code	Item	Batch No.	UoM	Pack Size	Qty.	Bonus	Purchase Price Rate	Sale Price	Margin

Sales Discount	Extra Discount	Sales Tax	Expiry	Amount

- Text area for:
 - Terms & Conditions
 - Instructions/ Notes

3.4.3 Sales and Purchase Invoices – On Print Screen

Whatever fields are to be shown on Print Screen, will be managed

3.5 Printing Templates

- A4
- Half of A4
- Thermal Roll (3 inches wide and unlimited length)

3.6 Inventory Fields

- Barcode (manual and through scanner)
- Item Name
- Item Code
- SKU
- Description
- Batch Number
- Expiry
- Category
- Sub-category
- Sub-sub-category
- Unit of Measure (UoM)
- Manufacturer
- Vendor/ Distributor Name
- Vendor/ Distributor Code
- Location (Multiple section)

- Rack Number
- Carton Size
- Pack Size
- Average Purchase Price
- Pack Sale Price
- Sale Price
- Sales Tax Percentage
- Discount Allowed (%age) on MRP
- Max Discount Allowed (%age)
- Quantity
- Minimum Quantity to be Sold
- Reorder Level
- Status (Active/ Inactive)
- ~~Active Ingredient/ Salt Name (Only for Pharmacies)~~
- ~~Service Charges (Only for Pharmacies)~~
- ~~Block Sale (Only for Pharmacies)~~
- ~~Controlled Items (Only for Pharmacies)~~
 - ~~Narcotics~~
 - ~~With Prescription Only~~

3.7 Stores

3.8 Shifts

3.9 Categories

- Level 1
- Level 2
- Level 3

3.10 Customers

- Name
- ID
- Mobile No. 1
- Mobile No. 2
- Landline
- Email
- Address
- Username
- Password
- Account Status (Active/ Inactive)
- GST No.
- Income Tax No.
- Customer Type
- Platinum
- Gold
- Silver
- Discount Allowed (Rs. and Percentage)
- Barcode
- Loyalty Points
 - Opening balance
 - Add: Points from current purchase
 - Less: Points redeemed
 - Closing cash

3.11 Vendors/ Distributors

3.12 Taxes

- Tax Type
 - Sales Tax
 - With-holding tax
- Tax Rate
 - x%
 - y%
 - z%
- Tax applied on:
 - Sales
 - Purchases
- Tax Application Method (Related to Sales Tax only)
 - Applied on pre-discount price
 - Applied on post-discount price

4. Getting Started

4.1 Sidebar

- Dashboard
- Store
- User Management
 - Roles
 - Permissions
 - All Users
 - Assign Discount
 - Assign Items
- Configuration
 - Store
 - Categories
 - Vendors/ Distributors
 - Customers
 - Tax
- Inventory
 - Items
 - Movements/ Transfers
 - Change Sale Price
 - Adjustments
- Purchases
 - Purchase Orders
 - Receivings
 - Loose Receivings
 - Purchase Returns
- Sales
 - Invoices
 - Sale Returns
- Audit
 - Sales
 - Purchases
 - Inventory

- Expenses
- Delivery/ Courier
 - Orders
 - Order Report
 - Payment Report
 - Order Tracking
 - Return Control
 - Invoice Listing
- Accounts
 - Customer Ledgers
 - Vendor/ Distributor Ledgers
 - Expense Statement
 - Profit and Loss Statement
- Reports
 - Inventory
 - Reorder Level
 - Sales
 - Purchases
 - Expenses
- Cash Management
 - User-wise Entry
 - Cash Report

4.2 Create Users and assign Permissions of various functions/ features

4.3 Add Inventory items

4.4 Run Daily Operations

- Make Purchases
- Make Sales
- Incur expenses
- Change Shifts

5. Day Closing

- Verify & Finalize Purchases
- Verify & Finalize Sales
- Verify & Finalize Expenses
- Verify Cash (Shift-wise and Day-wise)

6. Cash Management

- Shift-wise cash handing-over and taking-over
- Cash Report
 - Opening Cash
 - Add: Sales in cash
 - Add: Purchase Returns in cash
 - Add: Cash received from HO/ Owner
 - Add: Surplus cash (treated as income)
 - Add: Loan taken
 - Less: Purchases in cash
 - Less: Sale Returns

- Less: Expenses in cash
- Less: Deficient cash (treated as expense)
- Less: Loan given
- Less: Cash handed over to HO/ Owner
- Closing cash

7. Audit

- Inventory
- Purchases
- Sales
- Expenses

8. Accounts

- Customer Ledgers
- Vendor/ Distributor Ledgers
- Expense Statement
- Profit and Loss Statement
 - Sales
 - Less: Cost of Sales
 - Gross Profit
 - Less: Operating Expenses
 - Net Profit

9. Dashboard (Key metrics/ Insights)

- Cards
 - Sales: Year-to-date, For the month, Increase/ decrease from corresponding monthly period
 - Purchases: Year-to-date, For the month, Increase/ decrease from corresponding monthly period
 - Expenses: Year-to-date, For the month, Increase/ decrease from corresponding monthly period
 - Profit/ Loss: Year-to-date, For the month, Increase/ decrease from corresponding monthly period
- Sales and Purchases – Month-wise
- Category-wise Sales – Year-to-date
- Category-wise Sales – For the month
- Daily Sales
- Daily Purchases
- Items reaching Reorder Level
- Daily Cash

10. Reporting (according to your business needs)

10.1 Sales

- Date-wise (Range)
- Invoice-wise (Range)
- Invoice-type-wise
- Store-wise

- Customer-wise
- Salesman-wise
- Payment-mode-wise

10.2 Purchases

- Date-wise (Range)
- Invoice-wise (Range)
- Invoice-type-wise
- Store-wise
- Vendor/Distributor-wise
- Receiving-Person-wise
- Payment-mode-wise

10.3 Inventory

- Store-wise
- Category-wise
- Status-wise (Active/ Inactive)
- Reorder Level Items

You can choose items with or without zero values

10.4 Expenses

- Date-wise (Range)
- Store-wise
- Expense-category-wise