Standard Bank

SimplyBLU

Quick Start Guide

Now available on
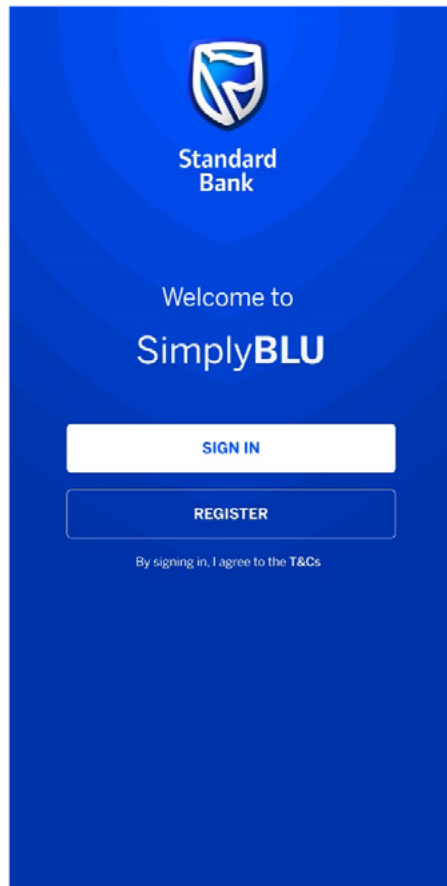
Google Play

Do more than just payments.
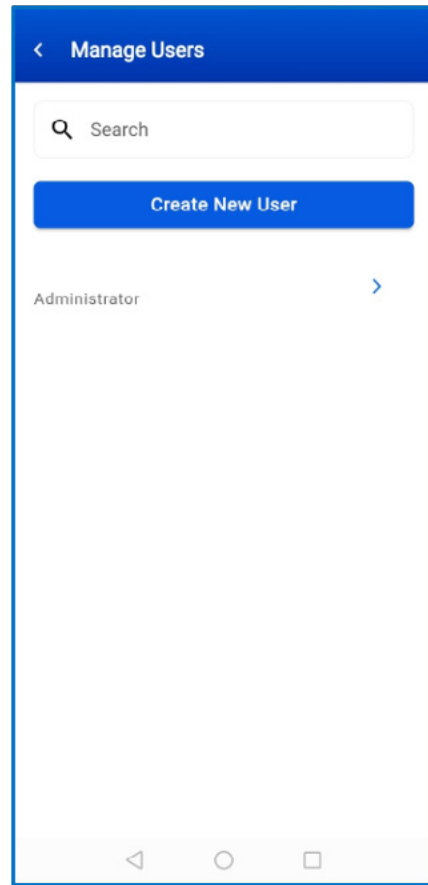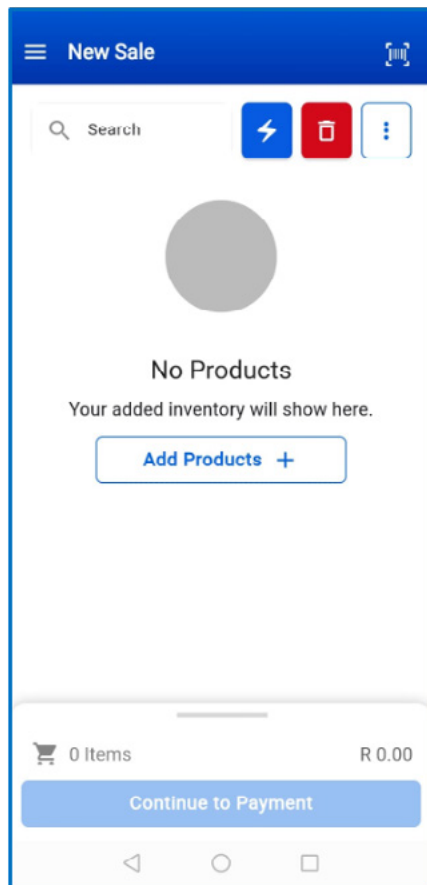
Contents

Log In

1. Open the SimplyBlu app

2. Tap on **Log In**

3. Enter the details that have been provided to you
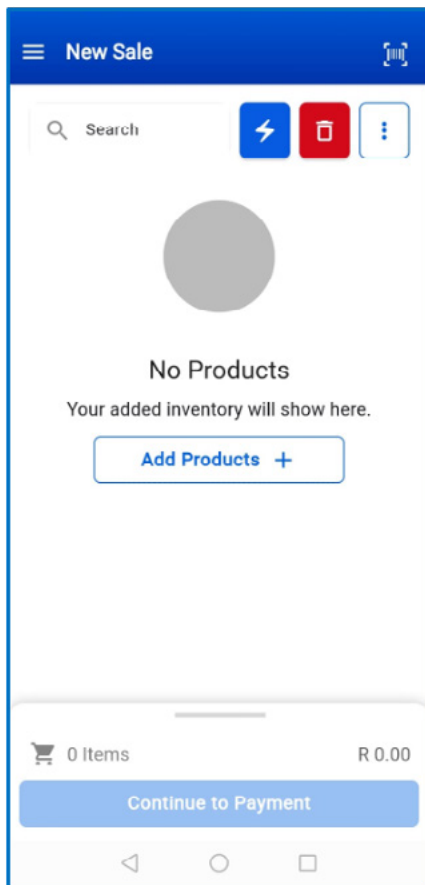
Create User(s)

1. Open the **burger menu** on the left

2. Under **Manage Business**, tap on **Users**

3. Tap on **Create User**

4. Enter the relevant details

5. Tap on **Permissions** and set the permissions you would like to grant to a cashier using the app to sell items at the event(s)

6. Go back

7. Tap on the **Save icon**

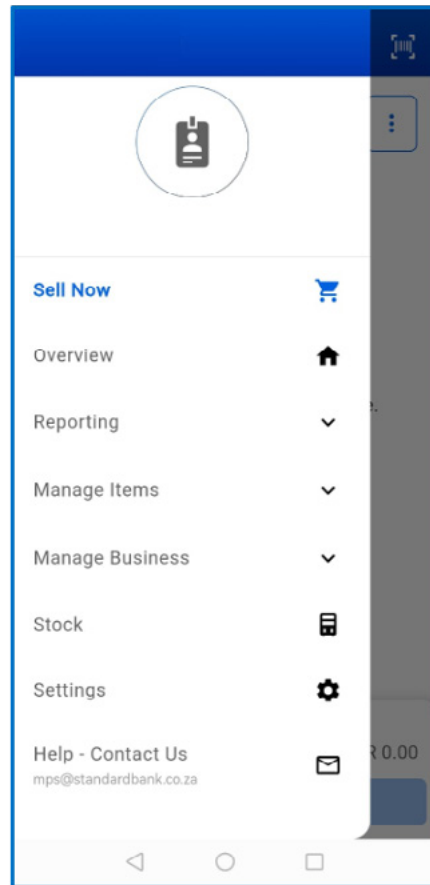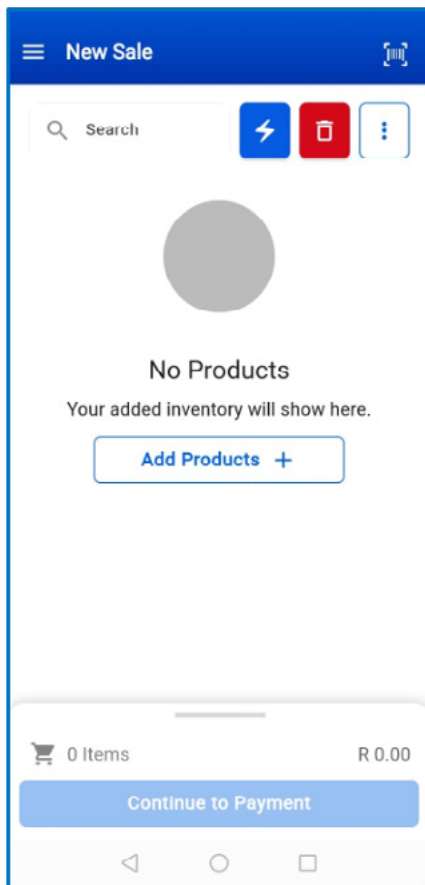8. Set the **Password** for the user and tap on Complete

Create Products

1. Open the **burger menu** on the left

2. Under **Manage Items**, tap on **Products**

3. Tap on **New Product**

4. Enter the relevant product details and tap on **Create Product**
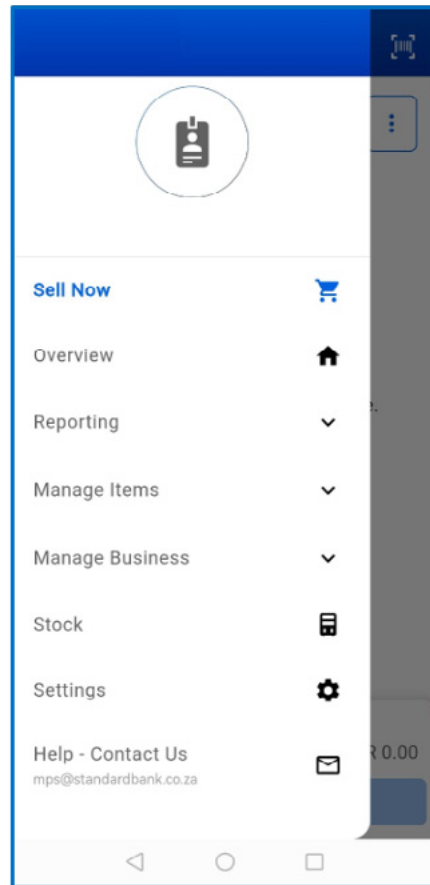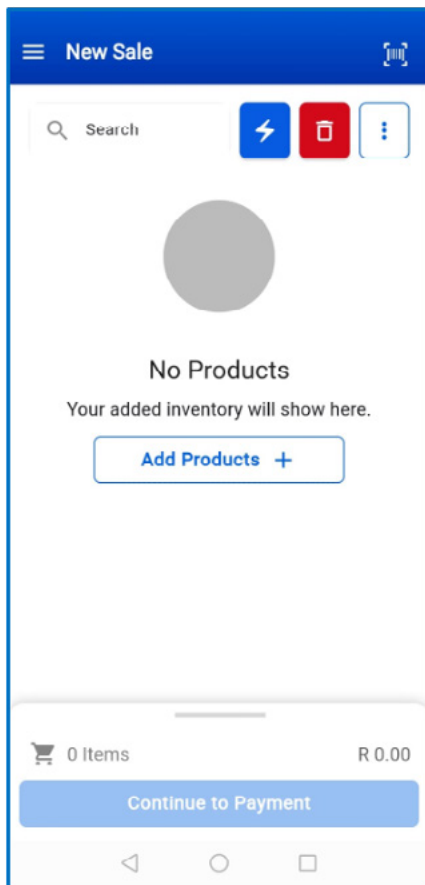
Sell

Access Sell Now (Admin)

1. Open the **burger menu** on the left

2. Tap on **Sell Now**

Sell

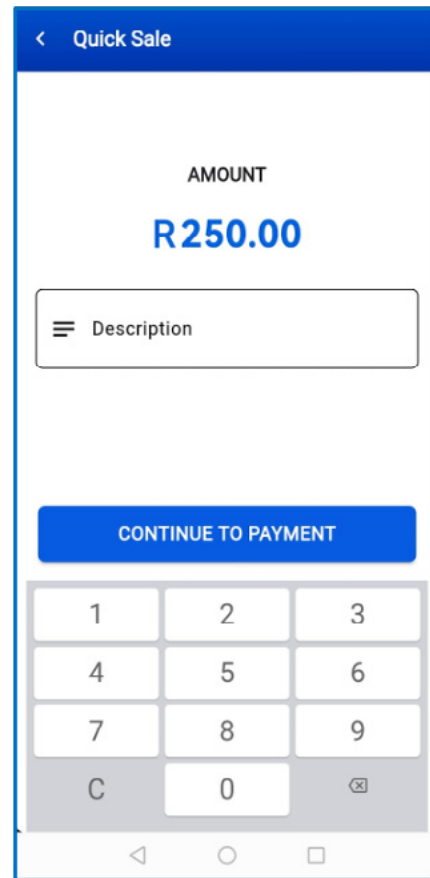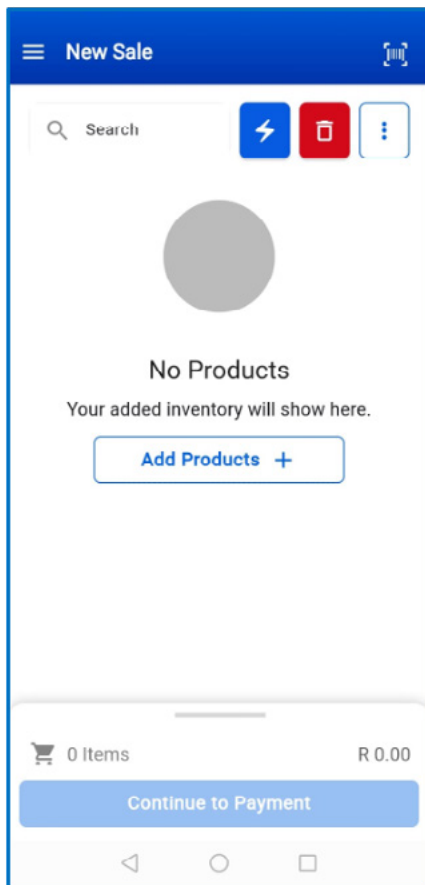Access Sell Now (Other User)

1. Open the **burger menu** on the left

2. Tap on **Sell Now**

Note: you will see that this cashier user has far fewer permissions than the business owner.
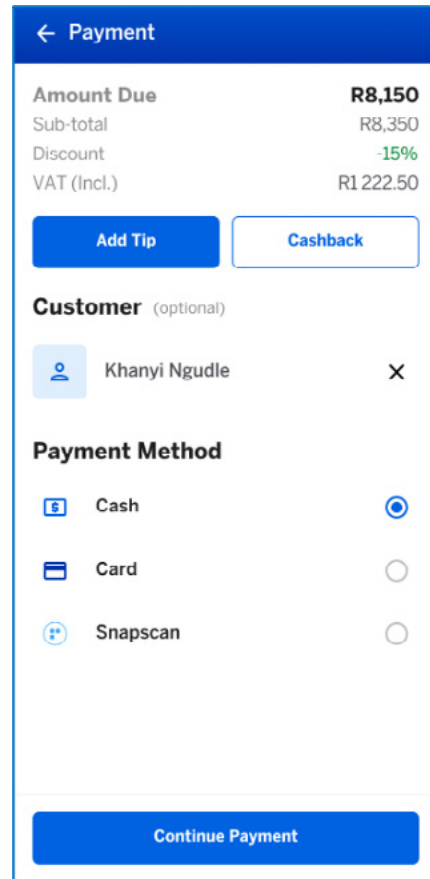
Sell

Quick Sale

1. Open the **New Sale** page

2. Tap on the **lightning bolt icon** on the right

3. Enter the relevant details and tap on **Continue to Payment**

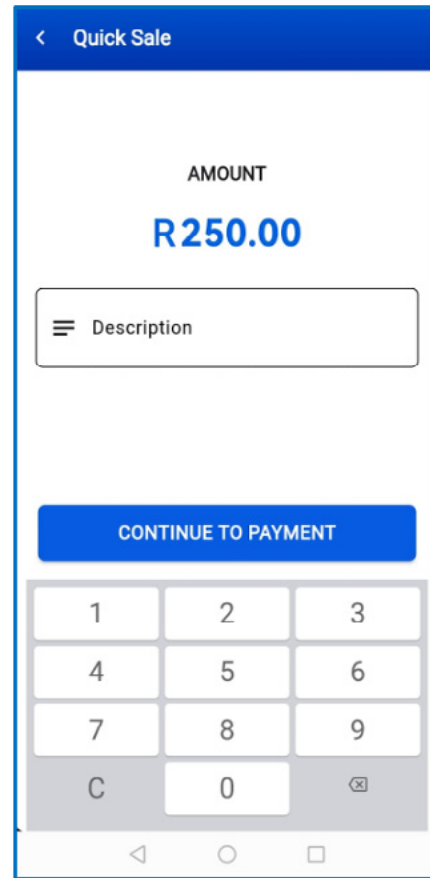4. Select the payment method and tap on **Confirm Payment**

Sell

Sell from Product Catalogue
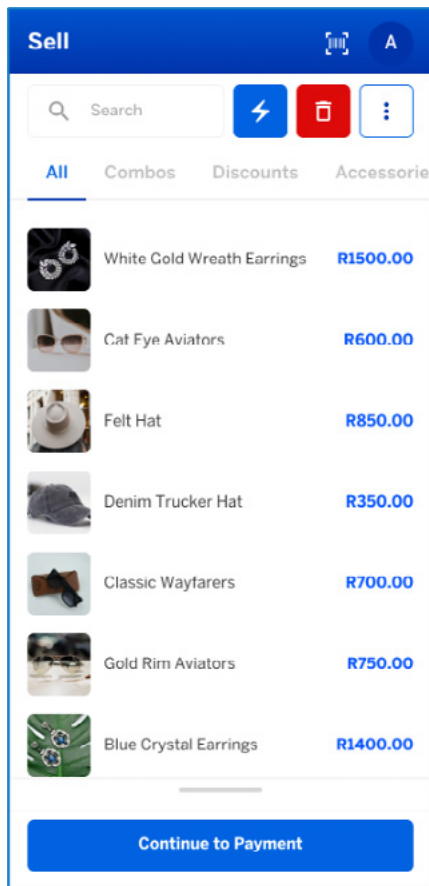
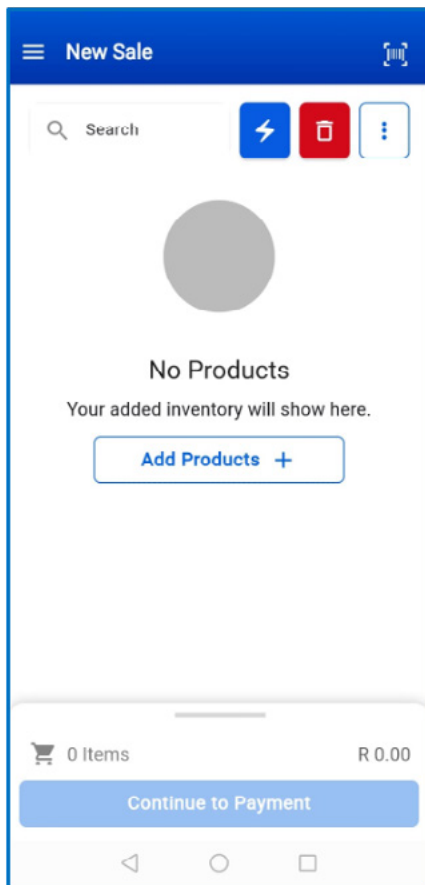1. Open the **New Sale** page

2. Tap on the **desired product**

3. Update the quantity if desired

4. Tap on **Continue to Payment**

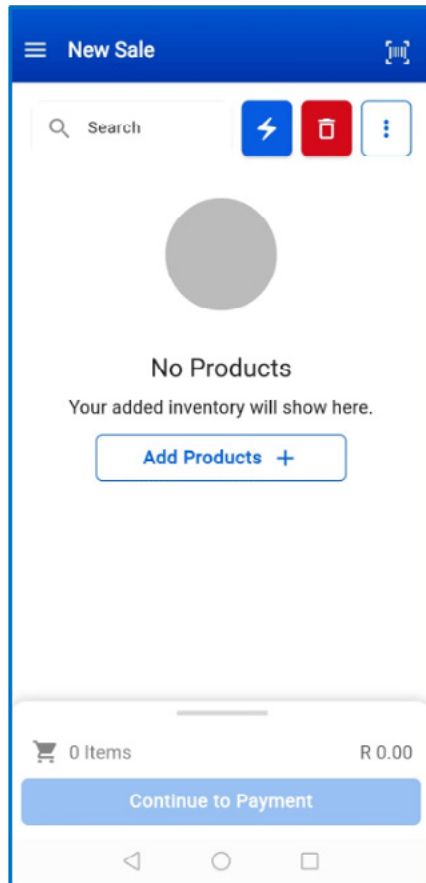5. Select the payment method and tap on **Confirm Payment**

Sell

Add Quick Item

1. Open the **New Sale** page

2. Tap on **Add Quick Item**

3. Tap on **Add**

4. Tap on **Continue to Payment**

5. Select the payment method and tap on **Confirm Payment**

Sell

Clear Cart

1. Tap on the **bin icon** on the top right

2. Tap on **Yes**
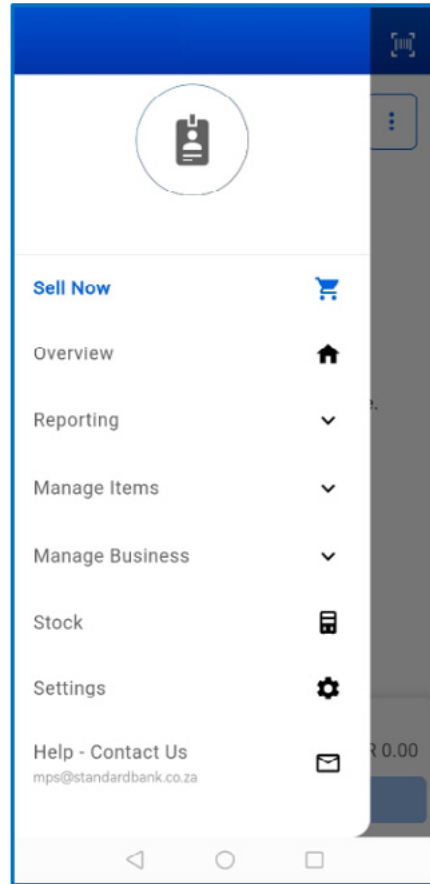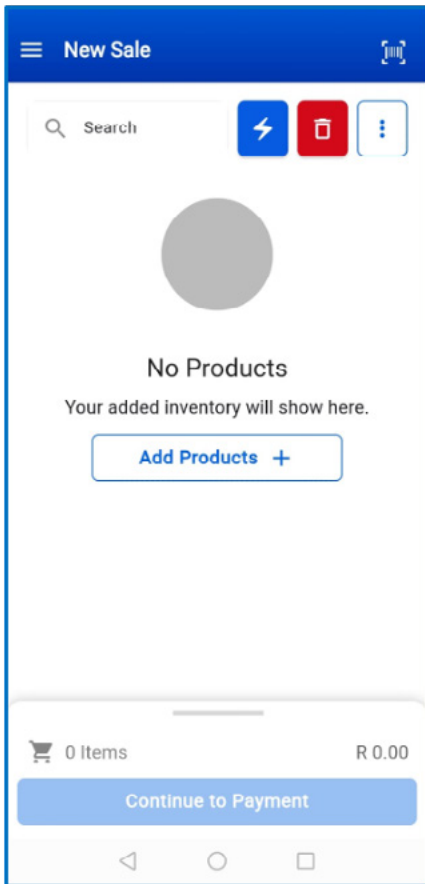
Please note

If the user has progressed to BroadPOS and the transaction fails, the user will be returned to the Complete Sale page. The sale is not discarded if the user goes back from this page. Please ensure that the cashiers are aware of this.

If you go back from the complete sale page, the items are not discarded from the cart.

Reports

Sales Report

1. Open the **burger menu** on the left

2. Under **Reporting**, tap on **Sales Report**

3. Select the desired filters (products, categories, customers, and sellers). Leaving these fields blank will display data for everything

4. Tap on **Apply Filters**

5. Data matching the filters is displayed in the report

6. Tapping on the **date** will allow you to update the date range

7. Tapping on the **magnifying glass** will allow you to update the filters
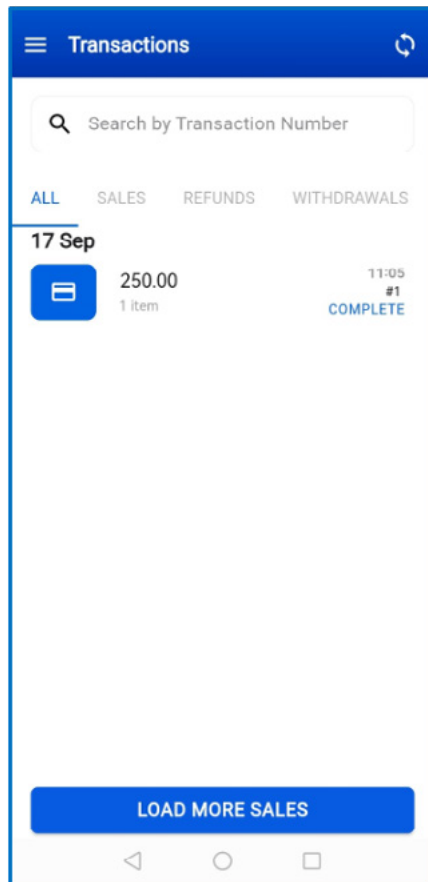
Transactions

Accessing Transactions
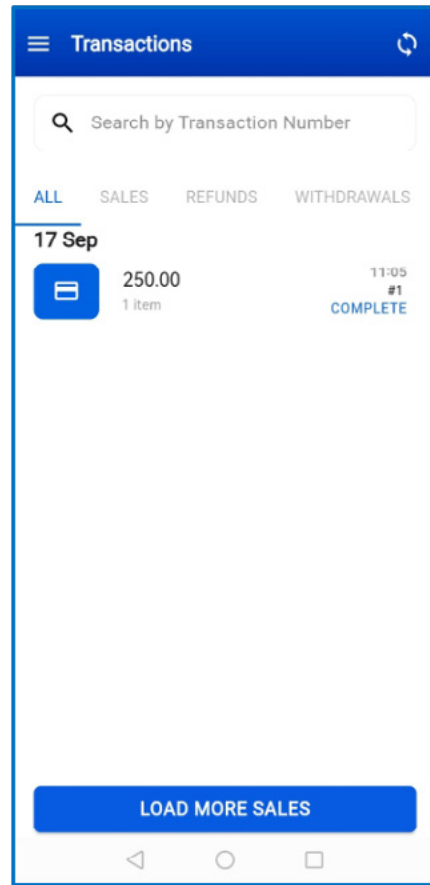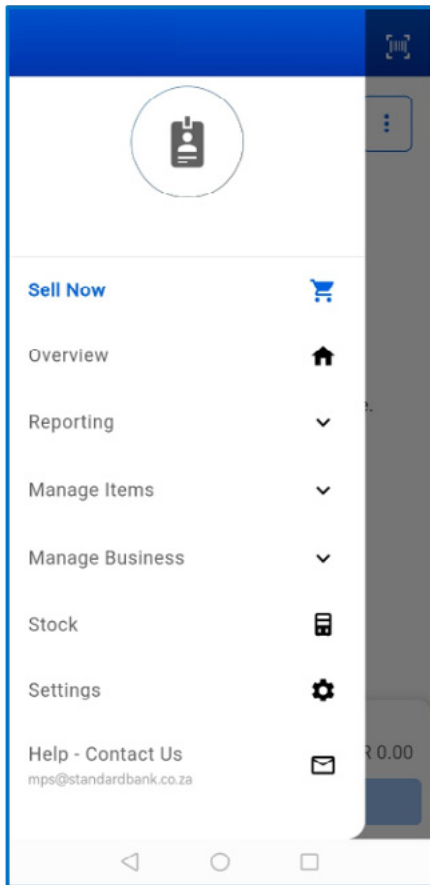
1. Open the **burger menu** on the left

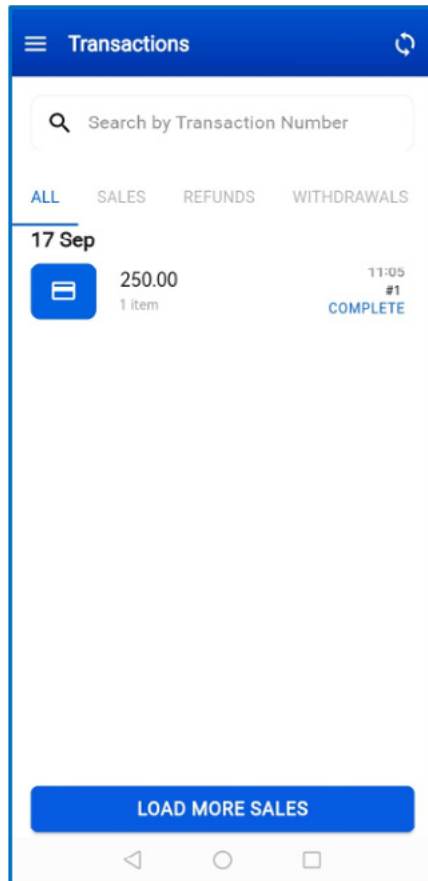2. Under **Manage Business**, tap on **Transactions**

Transactions

Transaction Details

1. Open **Transactions**

2. Tap on the **desired transaction**

3. The itemised list is shown

4. To view the receipt to re-print or re-send, tap on **View Receipt**

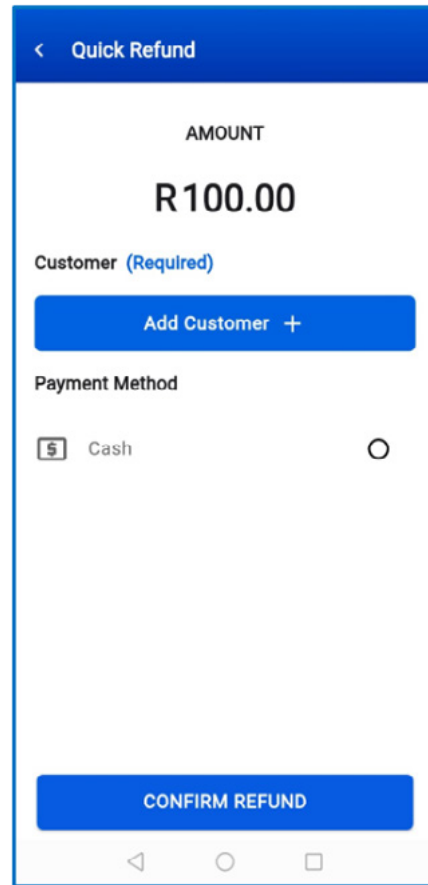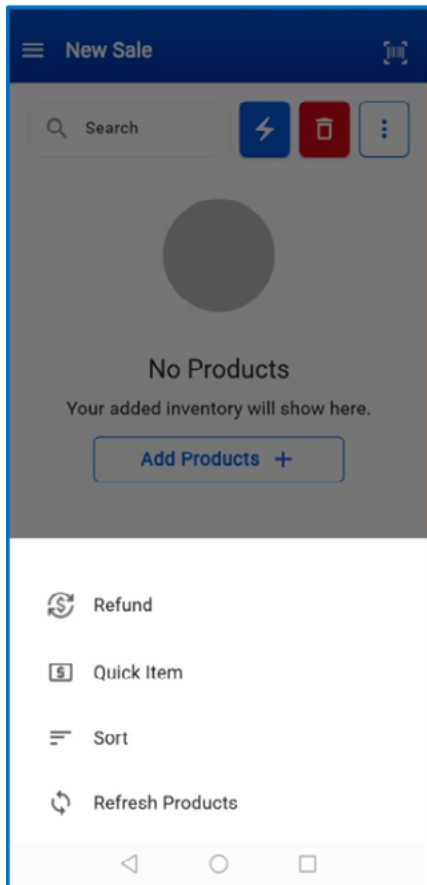5. To view the refunds against the transaction, tap on **View Refunds**

Transactions

Refund Transaction

1. Open **Transactions**

2. Tap on the **desired transaction**

3. Tap on **Refund Sale**

4. Select the desired products for refund

5. Tap on **Continue to Refund**

6. Add a customer to the refund and select the payment method

7. Tap on **Confirm Refund**

Refund Custom Amount

1. Tap on the **+ icon** on the right

2. Tap on **Refund**

3. Capture the refund amount, and tap on **Continue to Refund**

4. Capture a customer and payment method, and tap on **Confirm Refund**

Accessing Simply**BLU**

On the card machine:
Simply tap the **SimplyBLU** app icon.

On your mobile phone:
Download and install **SimplyBLU** by searching for it on the Google Play Store.

GET IT ON
Google Play

17