Holeshot Point-of-Sale System

By

Booker Vann

Submitted to
the Faculty of the Information Engineering Technology Program
in Partial Fulfillment of the Requirements for
the Degree of Bachelor of Science
in Information Engineering Technology

University of Cincinnati
College of Applied Science

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# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table of Contents</td>
<td>3</td>
</tr>
<tr>
<td>List of Figures</td>
<td>4</td>
</tr>
<tr>
<td>Abstract</td>
<td>5</td>
</tr>
<tr>
<td>1. Statement of the Problem</td>
<td>6</td>
</tr>
<tr>
<td>2. Description of the Solution</td>
<td>8</td>
</tr>
<tr>
<td>2.1 User Profile</td>
<td>9</td>
</tr>
<tr>
<td>2.2 Design Protocols</td>
<td>10</td>
</tr>
<tr>
<td>3. Design Protocols</td>
<td>13</td>
</tr>
<tr>
<td>4. Design and Development</td>
<td>15</td>
</tr>
<tr>
<td>4.1 Timeline</td>
<td>15</td>
</tr>
<tr>
<td>4.2 Budget</td>
<td>15</td>
</tr>
<tr>
<td>4.3 Testing</td>
<td>16</td>
</tr>
<tr>
<td>4.4 Software</td>
<td>16</td>
</tr>
<tr>
<td>4.5 Hardware</td>
<td>17</td>
</tr>
<tr>
<td>5. Proof of Design</td>
<td>18</td>
</tr>
<tr>
<td>5.1 Login</td>
<td>18</td>
</tr>
<tr>
<td>5.2 Manager Login</td>
<td>18</td>
</tr>
<tr>
<td>5.3 Manager Inventory Control</td>
<td>19</td>
</tr>
<tr>
<td>5.4 Manager Users</td>
<td>20</td>
</tr>
<tr>
<td>5.5 Manager Customers</td>
<td>20</td>
</tr>
<tr>
<td>5.6 Manager Shipping</td>
<td>21</td>
</tr>
<tr>
<td>5.7 Manager Suppliers</td>
<td>21</td>
</tr>
<tr>
<td>5.8 Sale</td>
<td>22</td>
</tr>
<tr>
<td>5.9 Purchase Order</td>
<td>26</td>
</tr>
<tr>
<td>5.10 Special Order</td>
<td>29</td>
</tr>
<tr>
<td>7. Conclusion</td>
<td>32</td>
</tr>
<tr>
<td>8. Recommendation</td>
<td>32</td>
</tr>
</tbody>
</table>
List of Figures

Figure 1 : Use Case Diagram                                      12
Figure 2 : Database tables                                      13
Figure 3 : Timeline                                            15
Figure 4 : Budget                                              15
Figure 5 : Hardware                                            17
Figure 6 : Login                                               18
Figure 7 : Manager Login                                       19
Figure 8 : Manager Inventory Control                            19
Figure 9 : Manager User                                        20
Figure 10 : Manager Customer                                   20
Figure 11 : Manger Shippers                                    21
Figure 12 : Manger Supplier                                    21
Figure 13 : Sale                                               22
Figure 14 : Sale 2                                             23
Figure 15 : Sale 3                                             24
Figure 16 : Sale Invoice                                       25
Figure 17 : Purchase Order                                     26
Figure 18 : Purchase Order 2                                   27
Figure 19 : Purchase Order Invoice                             28
Figure 20 : Special Order                                      29
Figure 21 : Special Order 2                                    30
Figure 22 : Special Order Invoice                              31
Abstract

Holeshoot Point-of-Sale system is a store management system that allows Holeshoot Motorsports to take advantage of the latest technologies to improve their customer experience while streamlining operations and leveraging existing investments. This system was customized to provide a better way for sales and inventory to be handled aiding in loss prevention and better cash handling. Holeshoot POS system will also be a user friendly system and replace a command line driven system that was difficult to use. Some of the other features of Holeshoot POS will allow user to receive stock into inventory, query inventory, and sell stock from inventory, and providing customer sales transaction receipts. Holeshoot POS was design primarily for budget-conscious retailers and those who operate in limited-space areas. Delighting customers, driving profits by improving transaction convenience and developing easy business reports were the chief objectives for using advanced technology to help manage a business.
1. Statement of the Problem

It is vitally important for a business to utilize the correct point-of-sale system for their environment. Point-of-sale systems are used for collecting, processing and recording data relating to business transactions. Each system has its own advantages and disadvantages, and it is up to the individual responsible for that particular point-of-sale system to choose the one that can operate most effectively within their environment.

One of the most important objectives with a point-of-sale system is keeping track of inventory. Controlling your inventory through a point-of-sale system can reduce your inventory reports and make sure that you order more wisely. Point-of-sale systems will also help you monitor and control future inventory which will increase your efficiency. Inventory reports will help you to stock more products that give you greater profits and fewer products that give you the least amount of profit. Point-of-sale systems also speed up your customer checkout. With a barcode scanner, you can checkout a customer in half the time required with a cash register. Even if you don’t use a barcode scanner, your checkout is still faster and more accurate because you are entering inventory item numbers which are automatically tied to the database for each inventory item. You can also reduce theft in your business. This is possible because your employees become more involved in watching the store inventory if they know that every piece of inventory in your business is being monitored. By comparing on-shelf inventory to your computerized reports, both you and your employees are much more careful about giving away inventory and retaining obsolete inventory.

Keeping track of your customers is another feature that is an obvious asset for any small businesses. Simply obtaining the name and address of every one of your customers
can keep the business and customer on a personal level. Mailing coupons, sales, or advertising new items to your customers periodically keeps them coming back.

With some of the great advantages with point-of-sales systems there are some disadvantages that arrive particularly with small businesses. Most small businesses feel that the cost for a high price point-of-sale system is irrelevant (2). Some point-of-sale vendors charge small businesses a fortune for the complete system then charge them for support. Some vendors also sell small businesses things that they do not need, because most small businesses do not have IT departments or an expert in that field to give them good advice (2). Another disadvantage is that it is confusing and overwhelming to choose a point-of-sale system. Some businesses often select the wrong point-of-sale system for their business. There are around 1,000 different point-of-sale systems to choose from (1). Many companies commonly go through 2, 3 or even 4 different point-of-sale systems before they find one they're happy with (1). Those mistakes probably cost at least $10,000 - $100,000 (1). Most of the disadvantages or problems of a point-of-sale system is not caused by the functionality of the product, many problems are business problems between the vendor and the consumer. By learning the consumer's needs an appropriate IT solution can be designed.

Holeshot Motorsports is a small motorcycle shop that sell bike parts and used bikes; sponsor professional bike racers; and does repair. Holeshot Motorsports currently has a poorly designed point-of-sale system compared to other motorcycle shops or small businesses. Even with their current system there are still many tasks that the employees have to manually do such as;

- serial number tracking
- customer number tracking
- part searching
- credit

The current application interface is not user friendly and has to be operated by someone that has a lot of experience with this particular system. Even though Holeshot Motorsports is a small business, a significant amount of customers crowd their store with tasks everyday. With various jobs, Holeshot can use a more professionally designed system.

2. Description of the solution

The solution for Holeshot Motorsports was to create an application with a database management system to be used as a more modern point-of-sale system. The application interface will have a professional appearance, and provide a user friendly interactive vehicle to deliver the needs of the business satisfaction. The application will connect to a database and do tasks that the current system cannot do such as:

- keep inventory and take orders for parts
- automate purchase orders
- credit frequent customers
- prepare invoices and many reports
- store statistics for the professional racers
An easy-to-use windows application will be created for the users to connect to the database and retrieve or insert information. A separate database for different catalog and vendor part numbers will be created to track parts.

I plan to work in two computing areas within the Information Engineering Technology program to complete this project. The main focuses will be on a database design and programming. A relational database will be created with Microsoft Access 2003. This database will be accessed by an application which will also address security issues. The program will be written to programming standards to be readable and maintainable. I will use standard protocols to communicate with the database to pull and receive data. I have decided to use C#.NET, which will work the best with my design in a Microsoft environment. Bar code technology will also be used to easily enter in data.

2.1 User Profile

Holeshot Motorcycle point-of-sales system (HMPOS) is used in a multi-user environment. There are three categories of application users. The three levels include guest, employee, and administrators. A user will get their account level based on their importance to Holeshot, not by their level of computer competence.

Guest Level User

Guest users needs to see data but should not be able to insert or delete any data. This user account will be given to auditors, tax officials, customers, or new employees. Computer competency at this level is not a concern because the user cannot impair any of the data with read-only rights.
Medium Level User

Medium level users have permission to read, write, and delete only data, but restrictions can be set by high level users. These users have access to control all of the data, but not the application features. These users are regular employees that help run the day to day operations of the shop. Computer competency at this level is a concern because mistakes can damage the data, so the appropriate training has to take place before the user is at this level.

High Level User

High level users have full control over every part of the application. These users also have the ability to set accounts and restrict access to desired parts of the application. Users with these rights are managers and technical supporters. Computer competency at this level is important because mistakes can damage the data and the application, so the appropriate training has to take place before the user is at this level.

2.2 Design Protocols

User Interface

The user interface will be created using C#.NET. The user interface is divided between the user roles of the Holeshot point-of-sale system. A login screen along with three user screens will make up the main parts of the user interface. The color scheme will consist of a red background with yellow lettering to stay consistent with the company colors. Motorcycle images, artistic designs and a company logo will be properly placed on each screen. Each interface will change depending on the user’s functionality and needs. The guest’s role is to view data. So the guest user interface will only allow the user to view data. This screen will not have any insert or delete buttons. This screen will
consist of labels, text fields, scroll bars and navigation buttons to view the accessible data. Employee's role is to manage data in the database such as inserting and deleting data. To carry on these features insert and delete buttons will give the employee a way to manipulate and control the data in the database. The administrator role is to manage the application and monitors other users. This interface will have all of the features the employees have and buttons to change permissions for a user and to restrict data. The login or home interface main function is to authenticate the users. This screen will also serve as a welcome page, which will include the title of the application and a brief description.
Use Case Diagram

The use case diagram shows the top level user roles information flow through the HMPOS.

Figure 1: Use Case Diagram
Figure 2: Database tables
3. Objectives of the project

- Advanced Product/Customer search facilities
- Serial number tracking
- Customer number tracking
- Part searching
- Keep inventory and take orders for parts
- Automate purchase orders
- Credit for frequent customers
- Invoices for many reports
- Refunds Handling
- Multi level permission based security
- Customer ordering at POS
- Bar Code scanning (If time allows)
4. Design and Development

4.1 Timeline

<table>
<thead>
<tr>
<th>Task</th>
<th>2004</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sep</td>
<td>Oct</td>
</tr>
<tr>
<td>Research</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Write Proposal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Present Proposal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Database Design</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Front-in application Design</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implement Database</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implement C# code</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop Prototype</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Testing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transferring Data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User Manual</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Final Presentation</td>
<td></td>
<td></td>
</tr>
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</table>

Figure 3: Timeline

4.2 Budget

<table>
<thead>
<tr>
<th>Item</th>
<th>cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software</td>
<td></td>
</tr>
<tr>
<td>Barcode scanner software</td>
<td>$75</td>
</tr>
<tr>
<td>Visual Studios.NET</td>
<td>$600</td>
</tr>
<tr>
<td>Access 2002</td>
<td>$150</td>
</tr>
<tr>
<td>Hardware requirements for Access</td>
<td></td>
</tr>
<tr>
<td>Pentium 75 MHz</td>
<td>$400</td>
</tr>
<tr>
<td>64 MB of RAM</td>
<td></td>
</tr>
<tr>
<td>30 MB of hard disk space</td>
<td></td>
</tr>
<tr>
<td>Barcode scanner</td>
<td>$150</td>
</tr>
<tr>
<td>total:</td>
<td>$1375</td>
</tr>
</tbody>
</table>

Figure 4: Budget
4.3 Testing

HMPOS went through an iterative testing scheme. Testing was divided up into three different stages: sub-system testing, partial integration testing, and full-system testing. To perform this procedure each small component will be tested, then added together and tested again. This incremental approach to testing made it easier to find defects in each component of the system.

4.4 Software

Windows NT/98/2000/ XP

C# is a modern, object-oriented language that enables me to quickly build a wide range of applications for the point-of-sale system, and provides tools and services that fully exploit both computing and communications. Because of its object-oriented design, C# would be a great tool for developing a point-of-sale system because of its wide range of components, from high-level business objects to system-level applications. C# language also can be converted into XML Web services, allowing them to be invoked across the Internet, from any language running on any operating system. Although I’m not planning on adding any web features to this application, being able to convert C# to XML data will give me that option.
### 4.5 Hardware

<table>
<thead>
<tr>
<th>Hardware</th>
<th>Requirements for Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processor</td>
<td>Pentium 75 MHz or higher</td>
</tr>
<tr>
<td>Memory</td>
<td>8 MB of RAM required for Access 2000,</td>
</tr>
<tr>
<td></td>
<td>64 MB of RAM for Windows 2000</td>
</tr>
<tr>
<td>Hard disk space</td>
<td>Access 2000 requires over 30 MB of hard disk space</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hardware</th>
<th>Requirements for SQL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processor</td>
<td>Pentium 166 MHz or higher</td>
</tr>
<tr>
<td>Memory</td>
<td>128 MB RAM or more recommended</td>
</tr>
<tr>
<td>Hard disk space</td>
<td>270 MB (full installation),</td>
</tr>
</tbody>
</table>

*Figure 5: Hardware*
5. Proof of Design

This section shows screen shots of some of the windows that make up Holeshot POS. These windows consist of buttons, labels, text boxes, combo boxes, and Crystal Report viewers. Each component has a specific purpose. Buttons are used to create an action such as to navigate through the application or deleting, inserting and updating records. These actions are driven by code specifically for that button. Labels display descriptions of text boxes and combo boxes. Text boxes and combo boxes are used to hold data that is entering or being retrieved from the database. Code also allows what data goes into the text boxes and combo boxes. Crystal Report viewers are used to capture a certain Crystal Report and display it on a form. This section will take you through the Manager role by showing screen shot and an explanation for these screens.

5.1 Login

![Login Screen](image)

Figure 6 : Login

The Login screen is the first screen to show. This screen will authenticate whether or not a user can get into the system. Depending on the role the user will go to the Employee, Guest, or Manager Login screen.

5.2 Manager Login

When a Manager logs into HPOS this is the screen that shows the different options that he/she can chose from. Notice that the username matches the Manager Name in the combo box. HPOS will keep track of where the user go throughout the system. The combo box will also populate the other employees. This will allow the other employees to complete tasks without logging in case the initial user gets...
5.3 Manager Inventory Control

This screen allows the Manager to control the inventory. The manager can navigate through the inventory with the navigation bars and the combo box. The manager also has the ability to update, insert, and delete inventory. The Under Stock buttons allow the manager to see if the items in the inventory is at the optimum level.
5.4 Manager Users

Figure 9: Manager User

This screen allows the Manager to control the users. The manager can navigate through the users with the navigation bars and the combo box. The manager also has the ability to update, insert, and delete users.

5.5 Manager Customers

Figure 10: Manager Customer

This screen allows the Manager to set information about a customer. The manager can navigate through the customers with the navigation bars and the combo box. The manager also has the ability to update, insert, and delete customers.
5.6 Manager Shipping

This screen allows the Manager to access information about the shippers. The manager can navigate through the shipping companies that are used, with the navigation bars and the combo box. The manager also has the ability to update, insert, and delete companies.

![Manager Shipping Screen](image)

**Figure 11: Manger Shippers**

5.7 Manager Supplier

![Manager Supplier Screen](image)

**Figure 12: Manger Supplier**
This screen allows the Manager to access information about the suppliers. The manager can navigate through the companies that are used, with the navigation bars and the combo box. The manager also has the ability to update, insert, and delete companies.

5.8 Sale

The Sales form is where a sales transaction will occur, completed by printing and invoice.

Figure 13: Sale

The sale form will appear to you first like the figure above and after you click on the New Sale button the customer, item, and pay method fields will appear.
Figure 14: Sale 2

After a customer, pay method, and each item is added the total button is clicked and the change and sales complete button will appear. The amount paid is entered then the change button is clicked and the change will appear.
After the sales transaction is done the sale complete button should be clicked and an invoice will appear in the report viewer as in the figure above. Below is a closer look at the invoice. As you can see the employee, customer, and sale ID is recognized. Also the sale transaction and pay method is on the invoice.
**Sale Invoice**

**HOLESHOT MOTOR SPORTS**

4 Interstate Access RD  
Wilder KY 41076

Date: 6/8/2005  
2:21:16AM

Employee ID: 1

Customer: J James

Sale ID: 61

<table>
<thead>
<tr>
<th>Item ID</th>
<th>Item</th>
<th>Quantity</th>
<th>Price</th>
<th>Discount %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1113873143</td>
<td>racing boots</td>
<td>5</td>
<td>$55.00</td>
<td>0</td>
</tr>
<tr>
<td>1534538130</td>
<td>nitro fluid</td>
<td>5</td>
<td>$56.00</td>
<td>0</td>
</tr>
</tbody>
</table>

Sub Total: $555.00

Tax: $33.30

Total: $588.30

Amount Paid $600.00  
Check

Change: $11.70

**Figure 16: Sale Invoice**
5.9 Purchase Order

A purchase order takes place when an item needs to be ordered from a supplier. The Purchase Order form will appear to you first as in the figure below and after you click on the New Order button the shipper, item, and supplier fields will appear.

![Purchase Order Form](image)

Figure 17: Purchase Order

After a shipper, supplier, and the first item is added the order complete button will appear. The freight is entered and a total is given after the order complete button is clicked and an invoice will appear in the report viewer as in the figure below.
Below is a closer look at the purchase order invoice. As you can see the employee, ship company, supplier information, and order ID is recognized. Also the each item information and the cost are located on the invoice.
**HOLESHT MOTOR SPORTS**

4 Interstate Access RD  
Wilder KY 41076

<table>
<thead>
<tr>
<th>Employee ID:</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Date:</td>
<td>6/8/2005 2:25:50AM</td>
</tr>
<tr>
<td>Via:</td>
<td>Express</td>
</tr>
<tr>
<td>Order ID:</td>
<td>73</td>
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</table>

<table>
<thead>
<tr>
<th>Item ID</th>
<th>Item</th>
<th>Quantity</th>
<th>Whole Sale</th>
<th>Retail</th>
<th>Discount %</th>
</tr>
</thead>
<tbody>
<tr>
<td>14997357</td>
<td>engine fluid</td>
<td>4</td>
<td>$5.00</td>
<td>$7.00</td>
<td>0.00</td>
</tr>
<tr>
<td>00128528</td>
<td>racing t-shirt</td>
<td>4</td>
<td>$10.00</td>
<td>$15.00</td>
<td>0.00</td>
</tr>
<tr>
<td>17297223</td>
<td>brake fluid</td>
<td>4</td>
<td>$15.00</td>
<td>$21.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Sub Total: $120.00  
Freight: $5.00  
Total: $125.00

Figure 19: Purchase Order Invoice
5.10 Special Order

A special order is a purchase order and sale transaction combined. This takes place when a customer wants to order an item that is not in stock from a supplier. The Purchase Order form will appear to you first as in the figure below and after you click on the New Order button the shipper, item, supplier, customer, pay method fields will appear.

![Special Order Form](image)

Figure 20: Special Order

After the shipper, item, supplier, customer, pay method fields are added and the total button needs to be clicked which will give you the total and automatically calculate tax. After the total and change is handled the order complete button will appear, the order complete button is clicked and an invoice will appear in the report viewer as in the figure below.
After the order is done the sale complete button should be clicked and an invoice will appear in the report viewer as in the figure above. Below is a closer look at the invoice. As you can see the employee, customer, supplier company, shipper company and order ID is recognized. Also the sale transaction and pay method is located on the invoice.
**HOLESHOT MOTOR SPORTS**

4 Interstate Access RD  
Wilder KY 41076  

Date:  6/8/2005  
2:31:45PM

**Employee ID:** 1

**Customer:** Tucker  
34 Tree  
Chicago, IL 222211

**Supplier:** Parts Unlimited  
342 Hoodle  
Dayton, OH 34343

**Via:** Slow  
**Special Order ID:** 39

<table>
<thead>
<tr>
<th>Item ID</th>
<th>Item</th>
<th>Quantity</th>
<th>Price</th>
<th>Discount %</th>
</tr>
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<tbody>
<tr>
<td>1114397557</td>
<td>engine fluid</td>
<td>5</td>
<td>$7</td>
<td>0</td>
</tr>
<tr>
<td>1117297239</td>
<td>brake fluid</td>
<td>5</td>
<td>$21</td>
<td>0</td>
</tr>
<tr>
<td>1100235339</td>
<td>street boats</td>
<td>5</td>
<td>$55</td>
<td>0</td>
</tr>
</tbody>
</table>

Sub Total: $415.00  
Tax: $24.00  
Freight: $44.00  
Total: $483.90  
Amount Paid: $500.00 Cash

---

**Figure 22:** Special Order Invoice
7. Conclusion

_Virtually most companies depend on a computer-base system. Holeshot POS is a_ great solution to replace an out-of-date POS. Holeshot’s old POS had a significant amount of functionality, in fact it did most of the things that the new system does. An easy to use system is what separates the new POS. In a service environment user friendliness is of high priority, especially if most of your users are not very computer savvy. I watched how the old system was being used and saw technology that made the user do some manual work that could be automated. To solve this problem a solution had to be carefully planned to meet all of the user general needs such as automate manual processes, easy uses, and reiterate functionality. By completing this project a technical solution has given Holeshot Motorsports an IT advantage.

8. Recommendations

Throughout this project, I experienced many challenges and learned from those challenges. The essential part of this project was analyzing the problem and matching that problem with a technical solution. I spent most of my time on analyzing how to make this an easier system to use by researching other modern POS systems. There are many different types of POS systems that use a variety of tools and resources. Some of the POS systems were very expensive, so I had to determine the most cost-efficient way to create a POS system that handled optimum functionality. Relearning some object-oriented programming and database concepts helped me develop better logical understanding for my design. With my knowledge of C#.NET, ADO.NET, Crystal Reports and database management I knew this will be a difficult project, but a project that could be done.