POINT OF SALE SYSTEM
USER MANUAL

Presented By
Proxima Technologies

1. Introduction 3
1.1. Purpose of the Manual 3
1.2. Overview of the POS System 3
1.3. Key Features 3
2. System Installation and Setup 5
2.1. Minimum Requirements 5
2.2. Initial Configuration 5
3. User Roles and Permissions 6
3.1. Admin Users 6
3.2. Regular Users 6
3.3. Managing User Permissions 7
4. Navigation and User Interface 8
4.1. Overview of the Navigation Bar 8
4.2. Home Page Features 8
4.3. Login & Register 9
5. User Management 10
5.1. Adding & Editing Users 10
5.2. Activating/Deactivating Users 11
5.3. Changing User Roles & Adjusting User Permissions 11
6. Product Management 12
6.1. Adding New Products 12
6.2. Editing and Deleting Products 13
6.3. Using the Search Function 13
7. Category Management 14
7.1. Adding New Categories 14
7.2. Editing and Deleting Categories 14
8. Supplier Management 15
8.1. Adding New Suppliers 15
8.2. Editing and Deleting Supplier Information 15
9. Customer Management 16
9.1. Adding and Editing Customers 16
9.2. Managing Payments and Viewing Transactions 17
10. Cashier Operations 17
10.1. Adding Items to the Cart 17
10.2. Managing Cart Items 19
10.3. Payment Methods and Order Management 19
11. GRN (Goods Receipt Note) Management 20
11.1. Adding Products to GRN 20
11.2. Viewing GRN Bills and GRN Lists 21
12. Payin and Payout Management 21
12.1. Recording Payin & Payouts Transactions 21
12.2. Balancing & confirmation User Accounts 22
13. Reports and Analytics 23

13.1. Types of Reports
- Delete Orders Report
- Payin/Payout Report
- Day Profit Report
- User Profit Report
- Product Quantity Report
- GRN Report
- Customer Report
- Sales Item Report
- Sales Report
- Delete Item Report 23
13.2. Using Date Ranges for Generating Reports 23
14. Profile and Company Management 24
14.1. Updating Admin Profile Details 24
14.2. Changing Password 24
14.3. Managing Company Information 25
15. Appendices 26
15.1. Glossary of Terms 26
15.2. Contact Support 27

1. Introduction

1.1. Purpose of the Manual

The purpose of this user manual is to provide a comprehensive guide for understanding and operating the POS (Point of Sale) system effectively. It is designed to assist administrators, cashiers, and other users in navigating the system's features and functionalities, ensuring seamless integration into daily business operations.

Specifically, this manual aims to:

- Provide step-by-step instructions for installing and setting up the system.
- Explain the roles and permissions for different user types (admin and regular users).
- Detail the functionality of each module, including user management, product management, cashier operations, GRN management, and reporting.
- Offer guidance on troubleshooting common issues and maintaining the system.
- Serve as a reference for maximizing the efficiency and accuracy of transactions and inventory management.

1.2. Overview of the POS System

The POS (Point of Sale) system is a comprehensive solution designed to streamline retail operations, enhance customer service, and manage inventory efficiently. It caters to two types of users: administrators and regular users.

This system facilitates the management of sales, products, categories, suppliers, customers, and financial transactions, ensuring smooth daily operations. It includes robust reporting capabilities for tracking profits, analyzing sales data, and monitoring user activity. With an intuitive interface and modular design, the POS system is adaptable for businesses of various sizes.

1.3. Key Features

- **User Management**
  - Role-based access control with admin and user roles.
  - Add, edit, activate/deactivate users, and assign permissions.
- **Product Management**
  - Add, edit, delete, and search for products.
  - Manage stock levels with alert notifications for low stock.

- **Category Management**
  - Organize products into categories for streamlined navigation and reporting.
- **Supplier Management**
  - Maintain supplier information and track GRN (Goods Receipt Note) details.
- **Customer Management**
  - Track customer loans and payments.
  - Set loan limits and view transaction histories.
- **Cashier Operations**
  - Barcode scanning for quick product entry.
  - Support for multiple payment methods (cash, bank transfer, card).
  - Manage cart items with options to hold, cancel, or save orders.
- **GRN (Goods Receipt Note) Management**
  - Add products to stock with detailed GRN entries, including free items.
  - Print GRN bills and review past entries.
- **Financial Transactions**
  - Record daily pay-ins and payouts.
  - Balance user accounts for transparent financial management.
- **Reports and Analytics**
  - Generate detailed reports for sales, profits, stock, customer loans, and user activities.
  - Date-range filtering for focused insights.
- **Security and Permissions**
  - Restricted access for new users until permissions are assigned by an admin.
  - Role-specific home page views based on user type.
- **Profile and Company Management**
  - Admins can update personal and company details, including passwords.
- **System Flexibility**
  - Modular structure for managing products, users, and transactions efficiently.
  - Print receipts for orders and transactions directly from the system.

By combining these features, the POS system empowers businesses to simplify operations, improve accuracy, and enhance customer satisfaction.

2. System Installation and Setup

2.1. Minimum Requirements

To install and run the POS system, ensure your environment meets the following requirements:

- **Server Requirements:**
  - **Operating System:** Linux, macOS, or Windows
  - **Web Server:** Apache or Nginx
  - **PHP Version:** PHP 8.0 or higher
  - **Database:** MySQL 5.7+ or PostgreSQL
  - **Composer:** Latest version (dependency manager for PHP)
- **System Requirements:**
  - **RAM:** 2GB or more
  - **Disk Space:** At least 500MB for the application files (more for database storage)
  - **Browser Compatibility:** Google Chrome, Mozilla Firefox, or Microsoft Edge
- **Additional Tools:**
  - **Node.js:** Required for front-end asset compilation
  - **Git:** For version control (optional but recommended)

2.2. Initial Configuration

- **Admin Account Setup:**
  - After installation, the system generates a default admin account.
  - Use the credentials provided in the seeder or documentation to log in as the admin.
- **Configure Application Settings:**
  - Navigate to the admin panel to update company details, such as name, logo, and contact information.
- **Set Up User Permissions:**
  - Use the admin account to define permissions and roles for other users.
  - Restrict access for newly registered users as needed.

- **Customize POS Settings:**
    - Update system-specific settings, including tax rates, default currency, and payment methods.

- **Verify Functionality:**
    - Test core features like user registration, product addition, and cashier operations to ensure the system is ready for use.

3. User Roles and Permissions

3.1. Admin Users

Admin users have full access to all the system's features and functionalities. They are responsible for overseeing operations, managing users, and configuring system settings.

Key Responsibilities of Admin Users:

- Adding, editing, and deleting users.
- Assigning and managing user roles and permissions.
- Managing product, category, supplier, and customer information.
- Generating and analyzing reports.
- Configuring system settings, including company details and default values.
- Monitoring stock levels, low stock alerts, and customer loan limits.

Default Admin Account:

- Upon installation, a default admin account is created.
- Admins can update their credentials and profile information through the "My Profile" section.

3.2. Regular Users

Regular users are individuals who handle day-to-day tasks like managing sales, entering transactions, and interacting with customers. By default, newly registered users are restricted from accessing most pages until permissions are granted by an admin.

Default Access for Regular Users:

- Initially, regular users can only view the Home page.
- They cannot access other pages or perform any actions until permissions are explicitly assigned.

Enhanced Permissions for Regular Users:

Depending on their role and responsibilities, regular users can be granted access to specific modules, such as:

- Cashier operations (e.g., adding items to the cart, processing payments).
- Managing products, categories, suppliers, or customers (if authorized).
- Generating reports for specific areas (if permissions allow).

3.3. Managing User Permissions

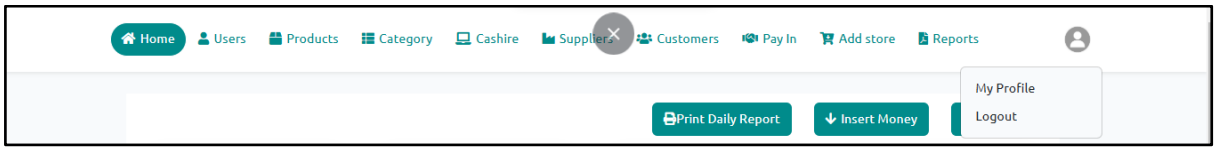
Admin users can customize permissions for regular users to ensure they have access only to the functionalities required for their role.

Steps to Manage User Permissions:

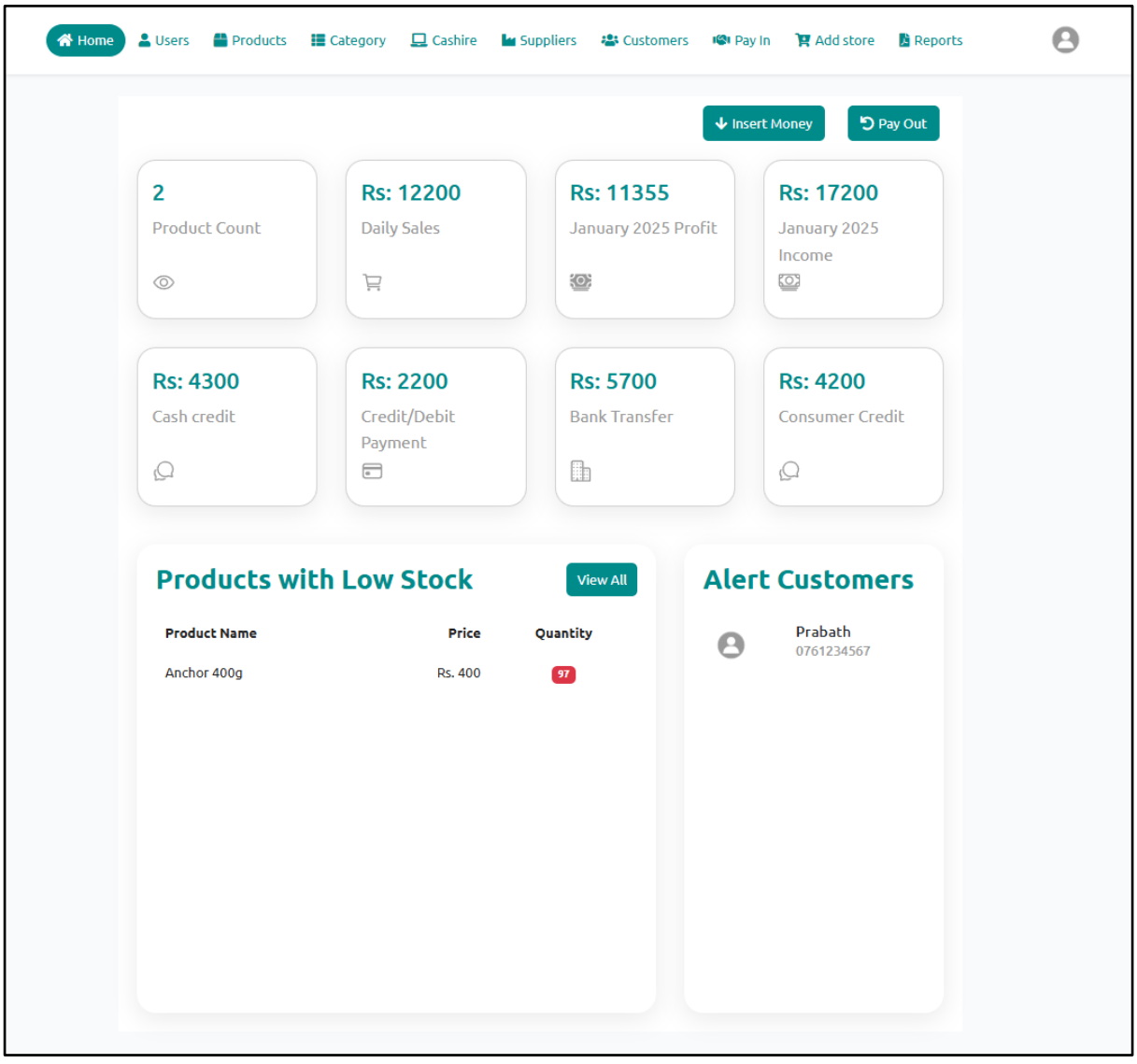
- Navigate to the User Management Page:
  - Log in as an admin and access the "Users" page from the navigation bar.
- Select the User to Modify:
  - Locate the user in the list and click on the "Edit" or "Permissions" button.
- Assign Permissions:
  - Enable or disable access to specific pages and functionalities.
  - Permissions can include:
    - Viewing, adding, editing, or deleting products, categories, and customers.
    - Accessing cashier operations and transaction management.
    - Generating reports or viewing financial data.
- Set User Role:
  - Change the user role to either "Regular User" or "Admin" as needed.
- Activate or Deactivate the User:
  - If required, toggle the user's active status to control their access to the system.
- Save Changes:
  - Click the "Save" or "Update" button to apply the changes.

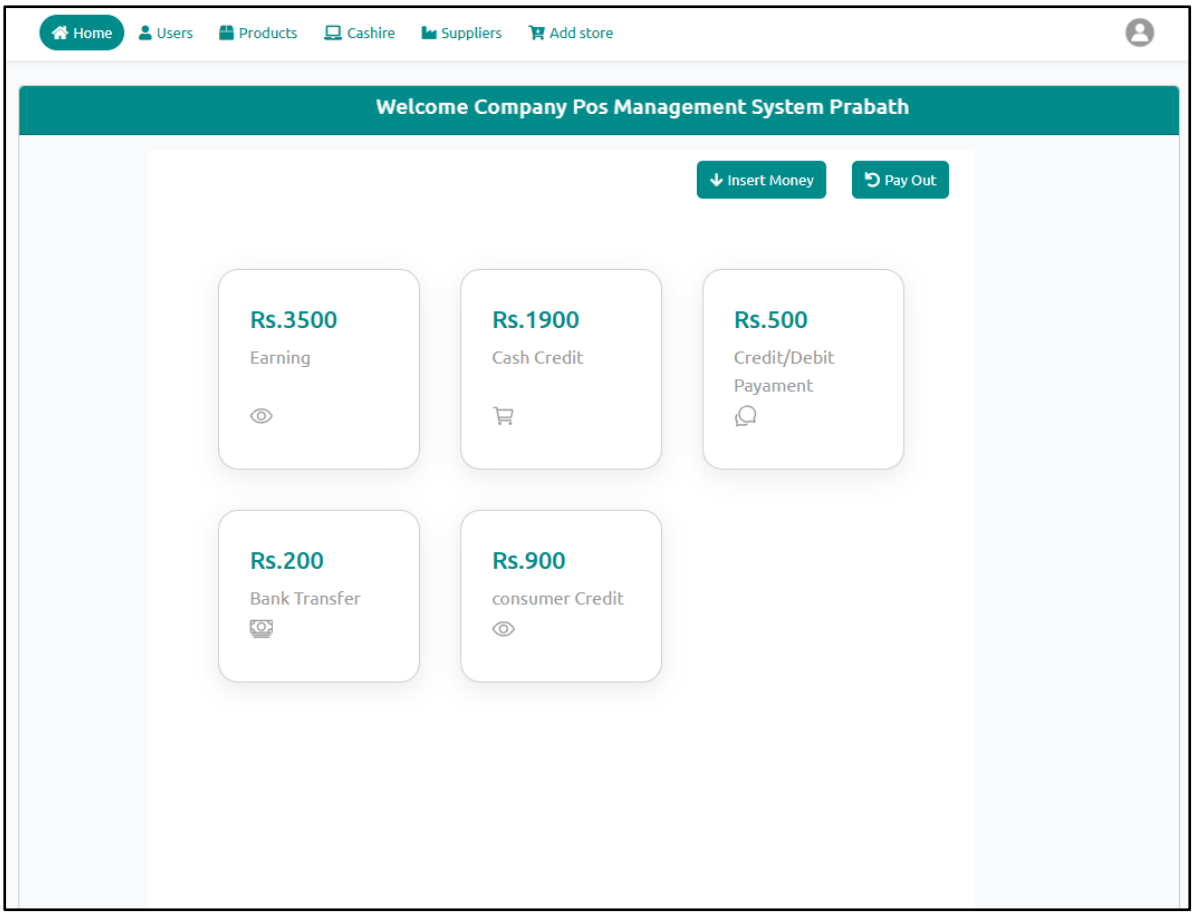
4. Navigation and User Interface

4.1. Overview of the Navigation Bar

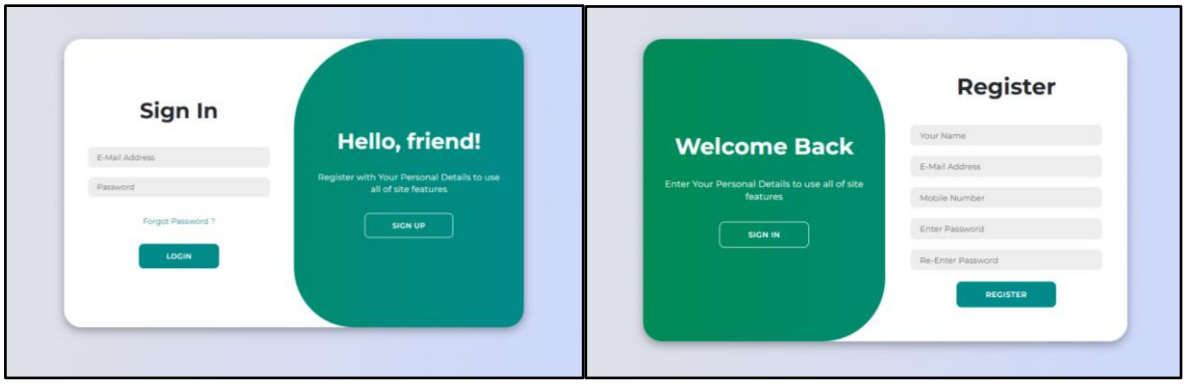


4.2. Home Page Features

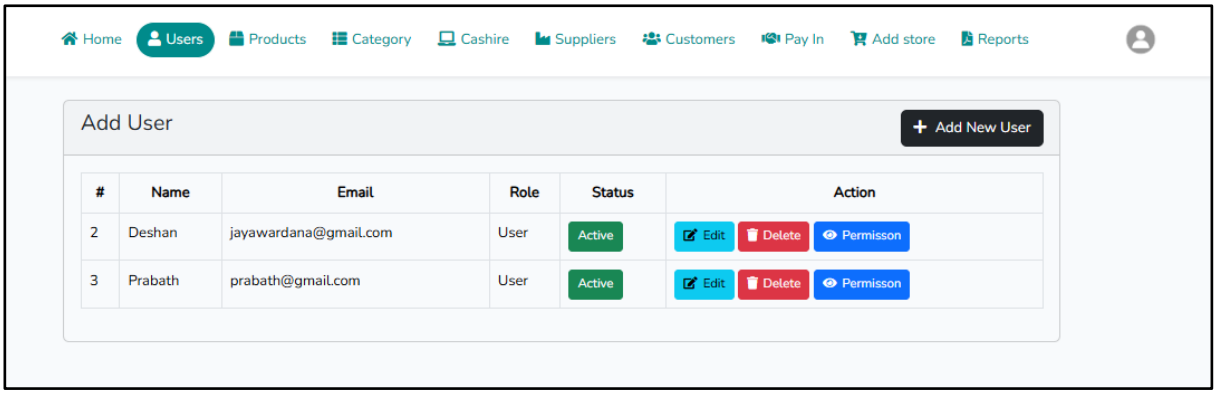




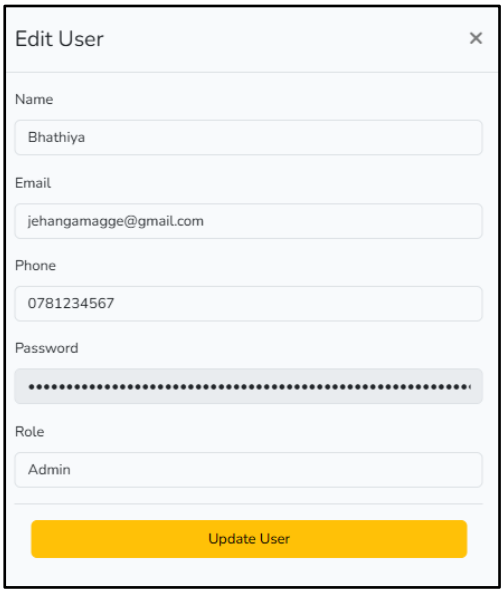
4.3. Login & Register

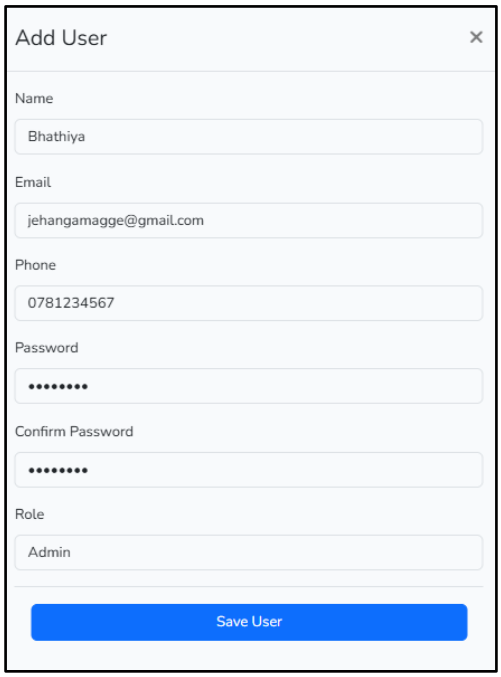


5. User Management

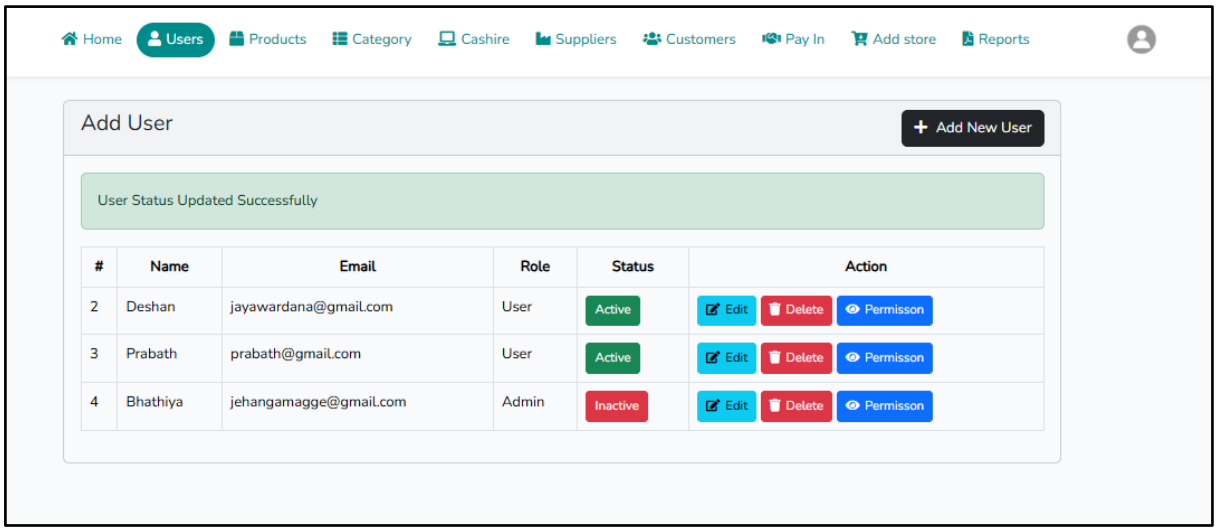


5.1. Adding & Editing Users

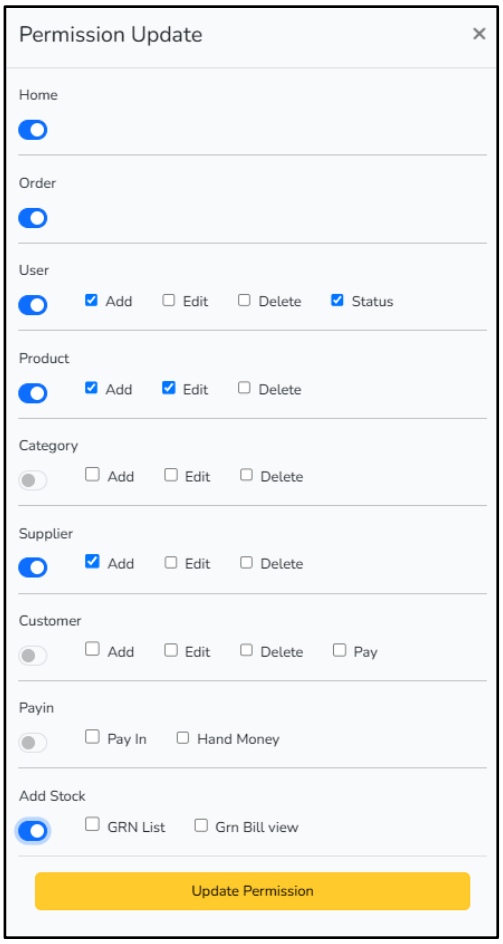




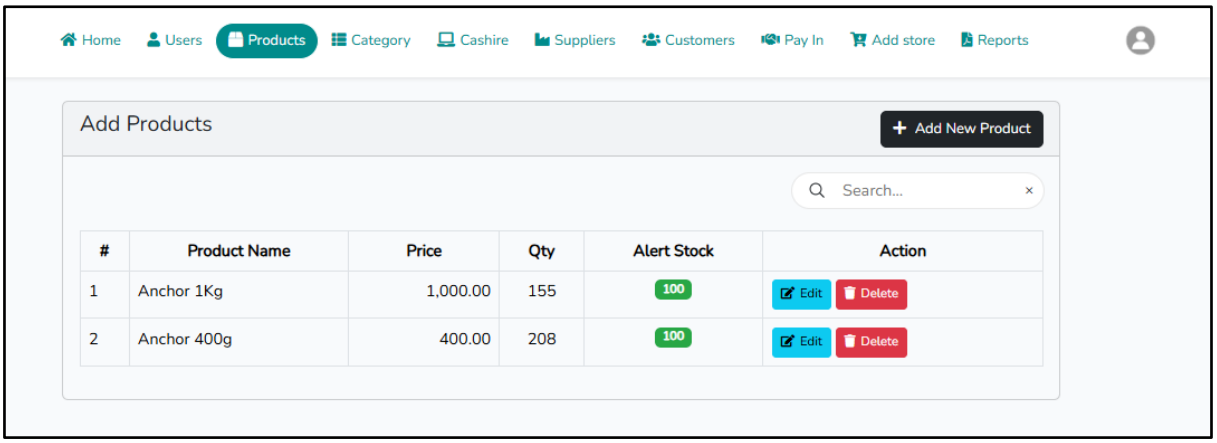
5.2. Activating/Deactivating Users



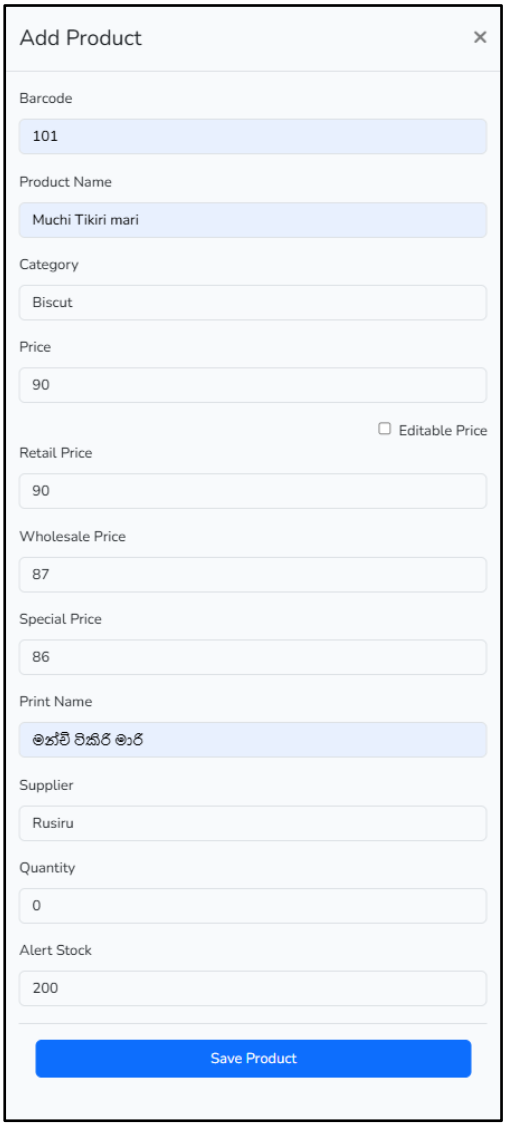
5.3. Changing User Roles & Adjusting User Permissions



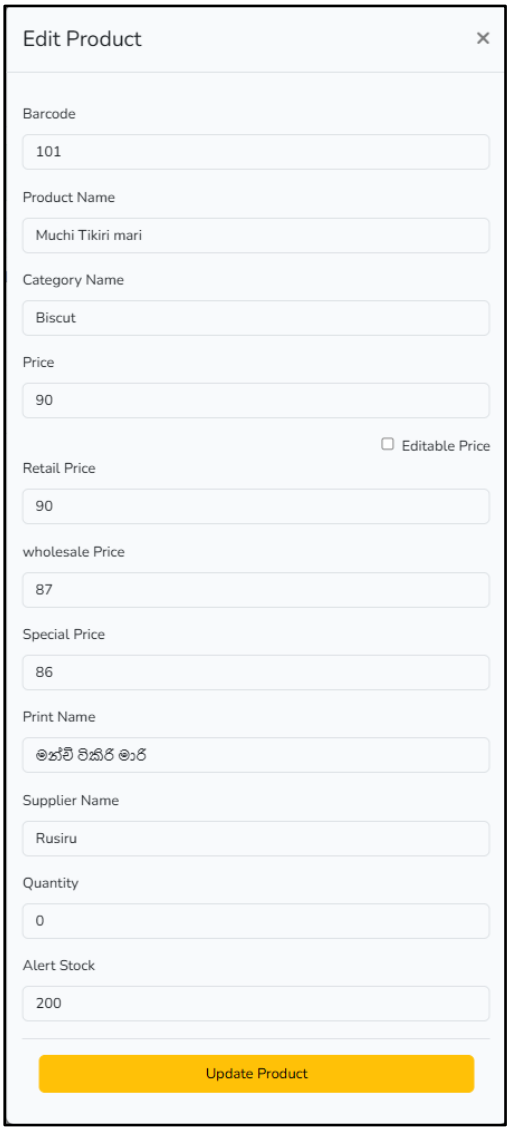
6. Product Management

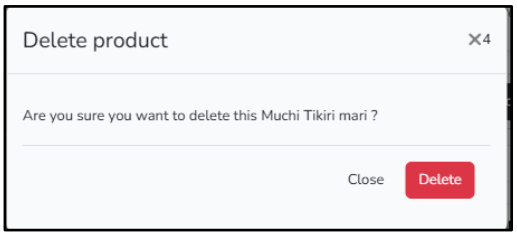


6.1. Adding New Products

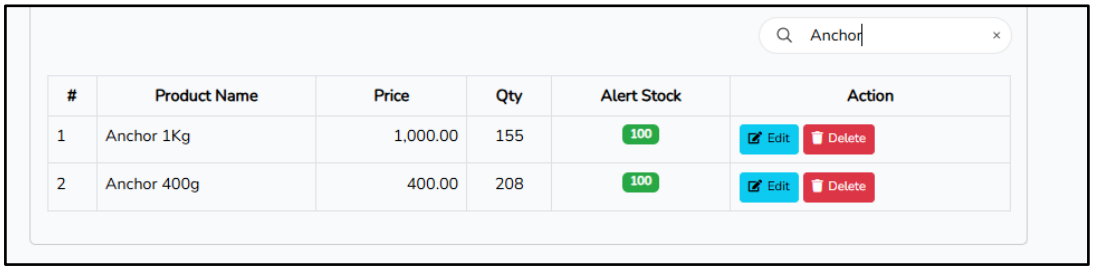


6.2. Editing and Deleting Products

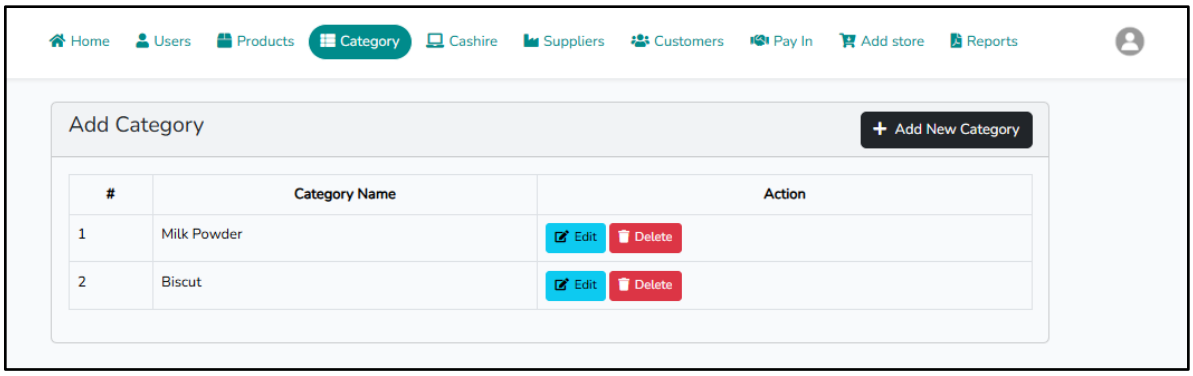




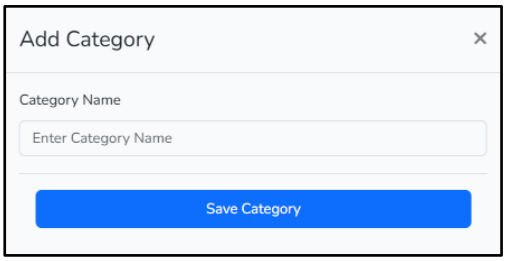
6.3. Using the Search Function



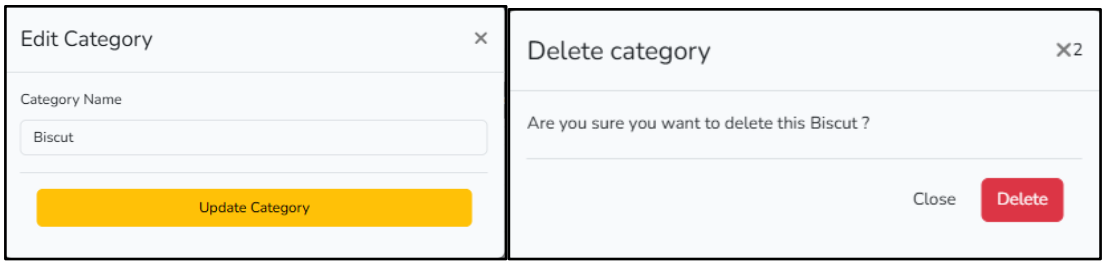
7. Category Management



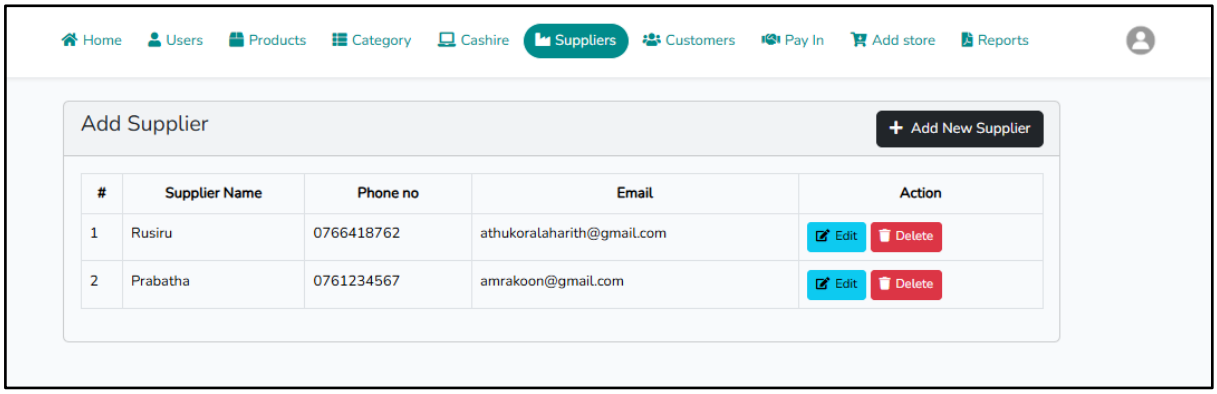
7.1. Adding New Categories



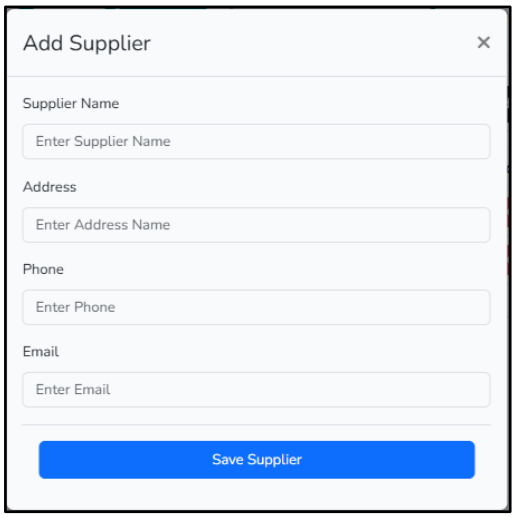
7.2. Editing and Deleting Categories



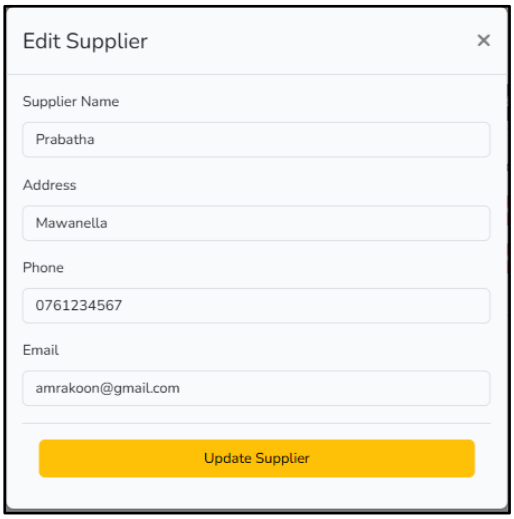
8. Supplier Management



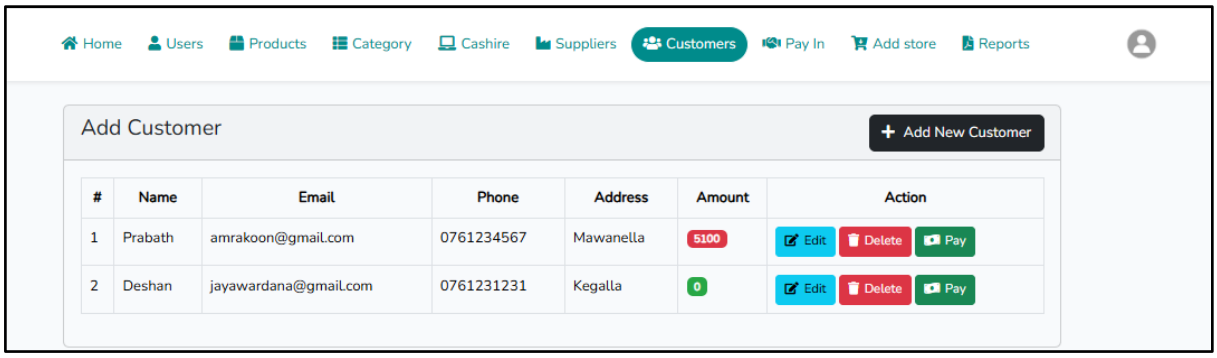
8.1. Adding New Suppliers



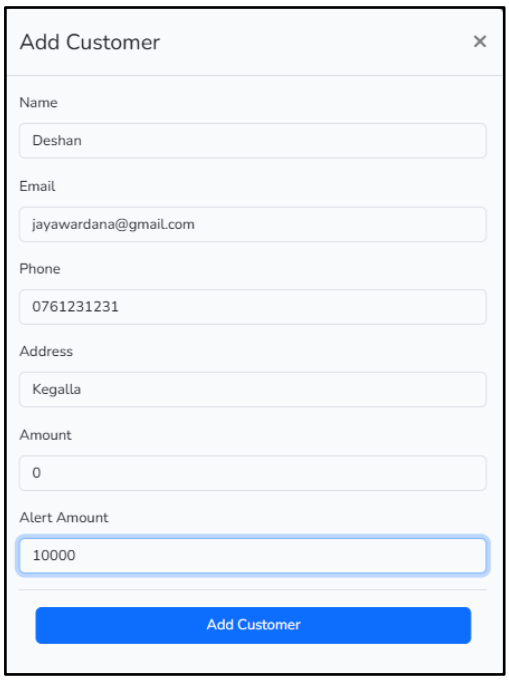
8.2. Editing and Deleting Supplier Information

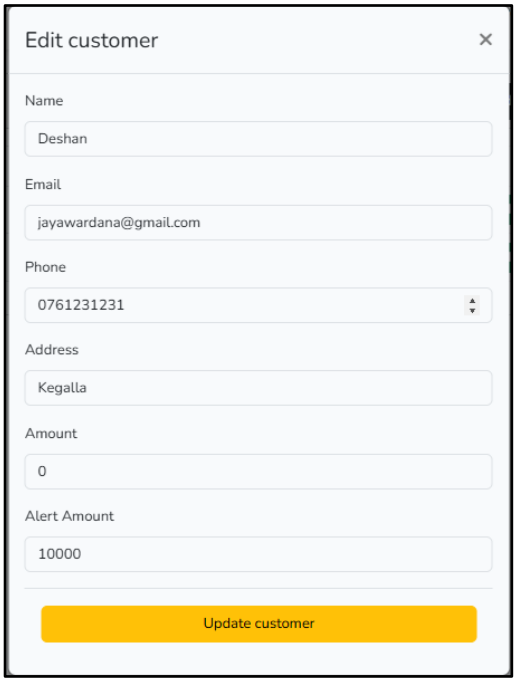


9. Customer Management

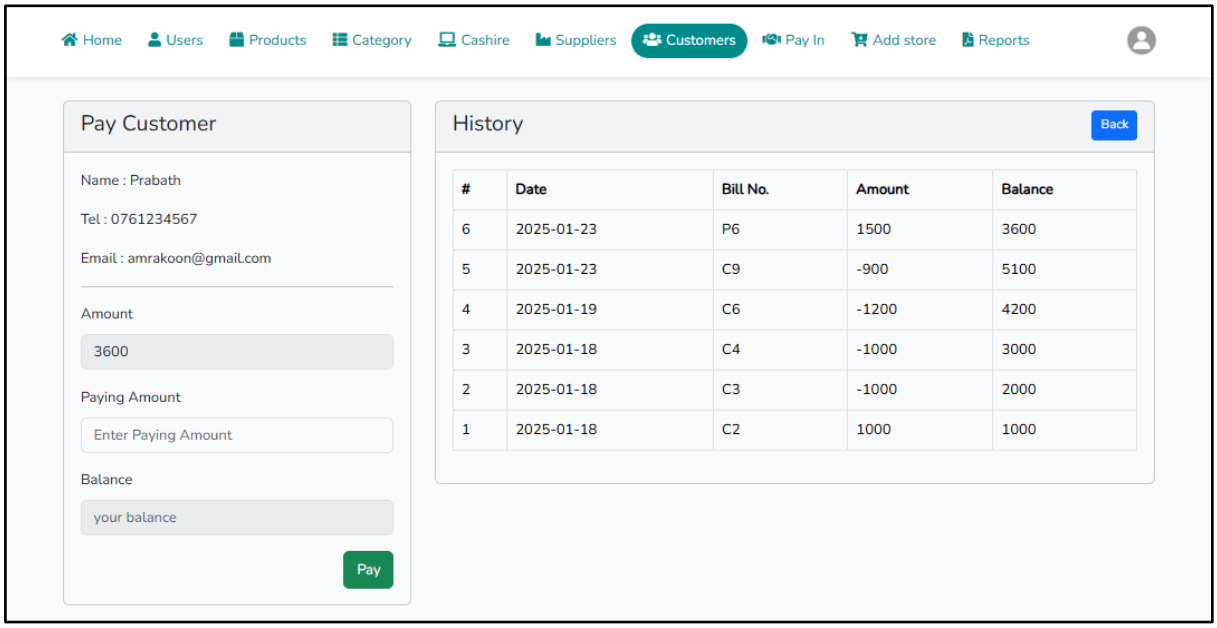


9.1. Adding and Editing Customers

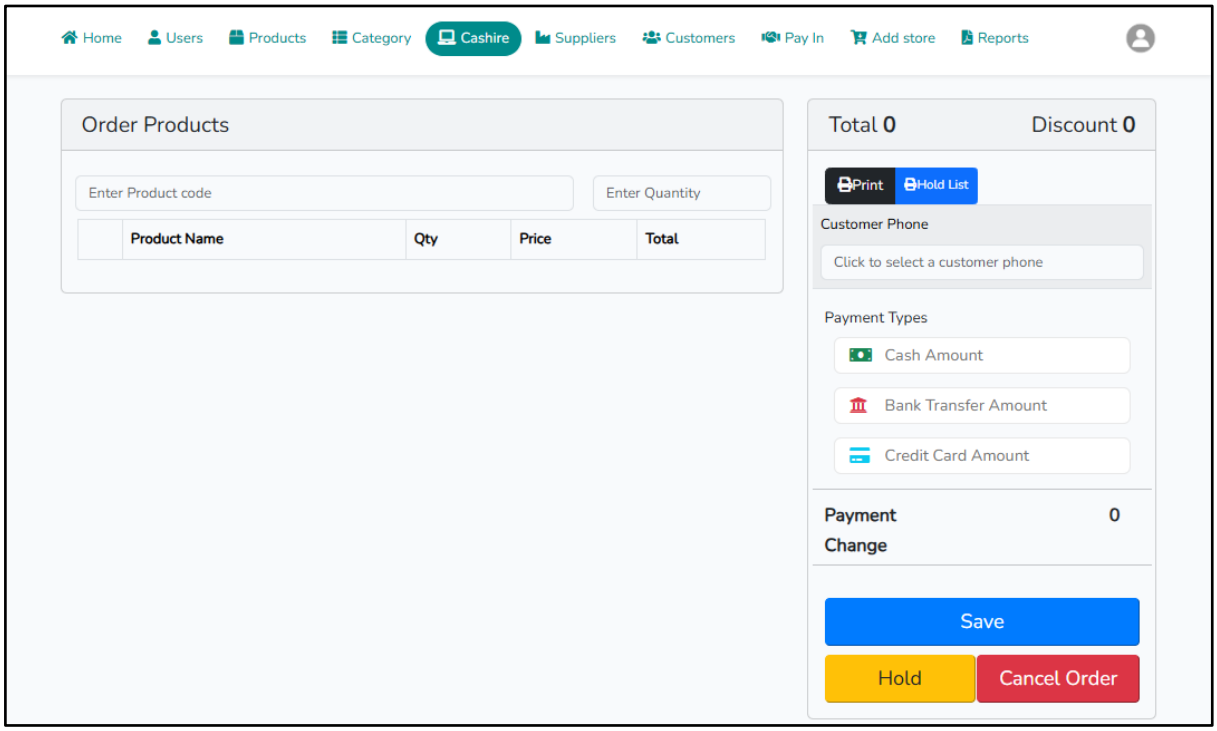




9.2. Managing Payments and Viewing Transactions

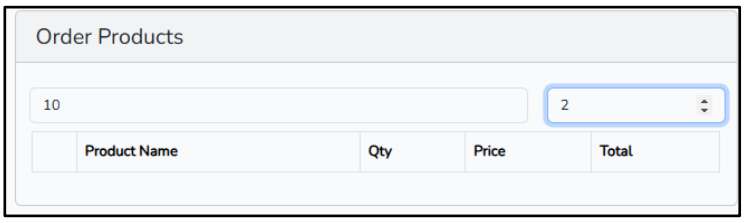


10. Cashier Operations

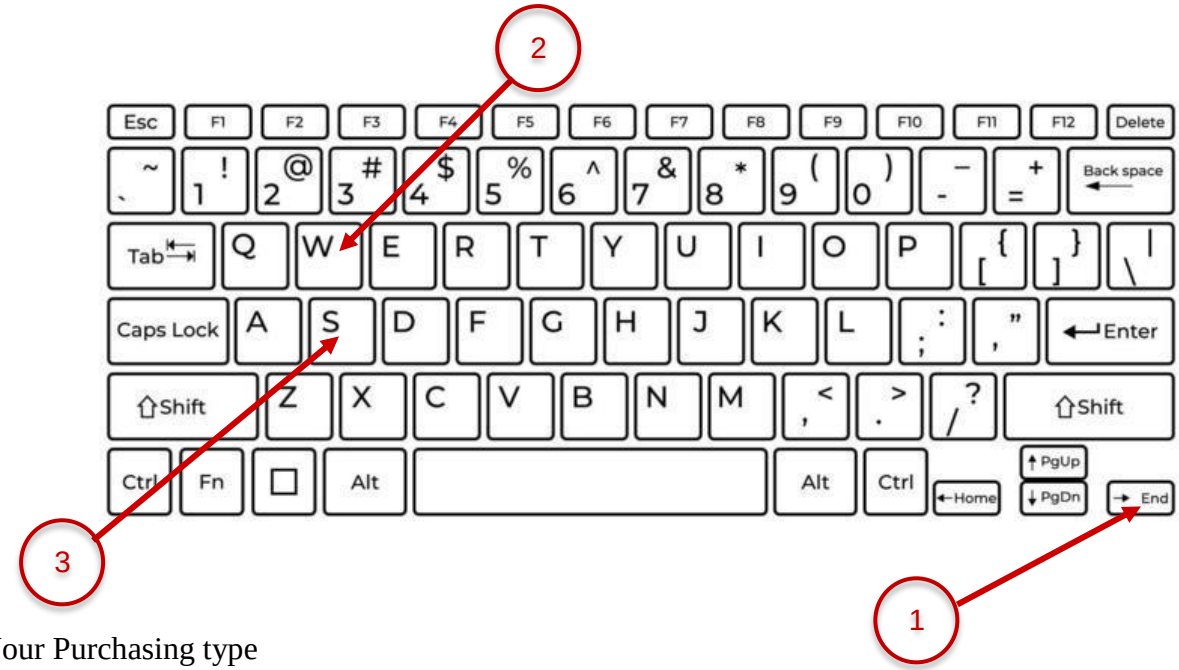


10.1. Adding Items to the Cart

Step 01



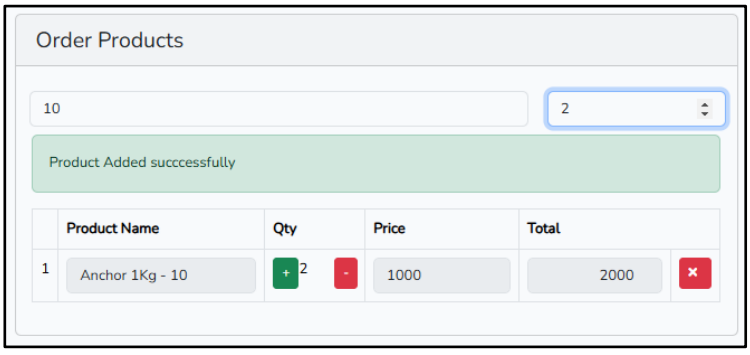
Step 02



Select Your Purchasing type

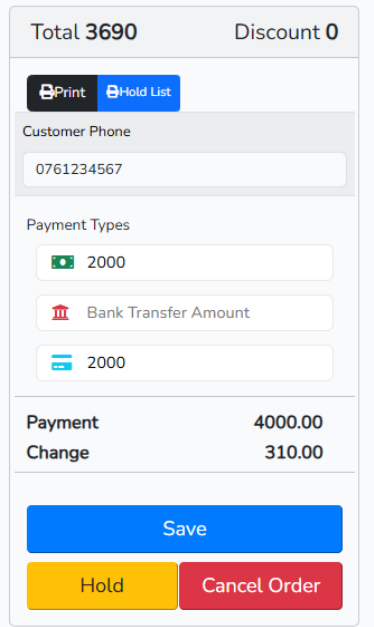
1. Retail price
2. Wholesale price
3. Special price

Step 03

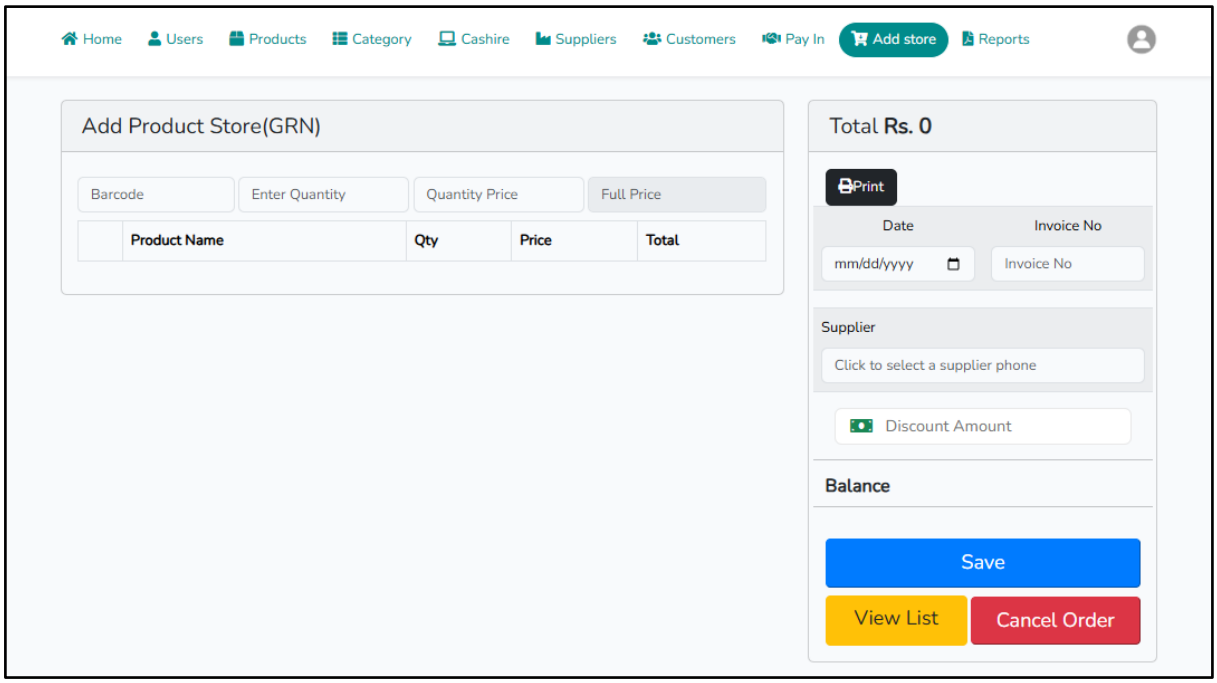


10.2. Managing Cart Items

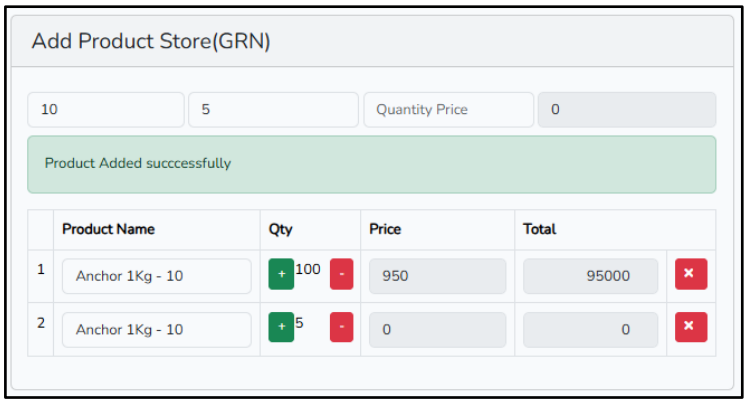
10.3. Payment Methods and Order Management



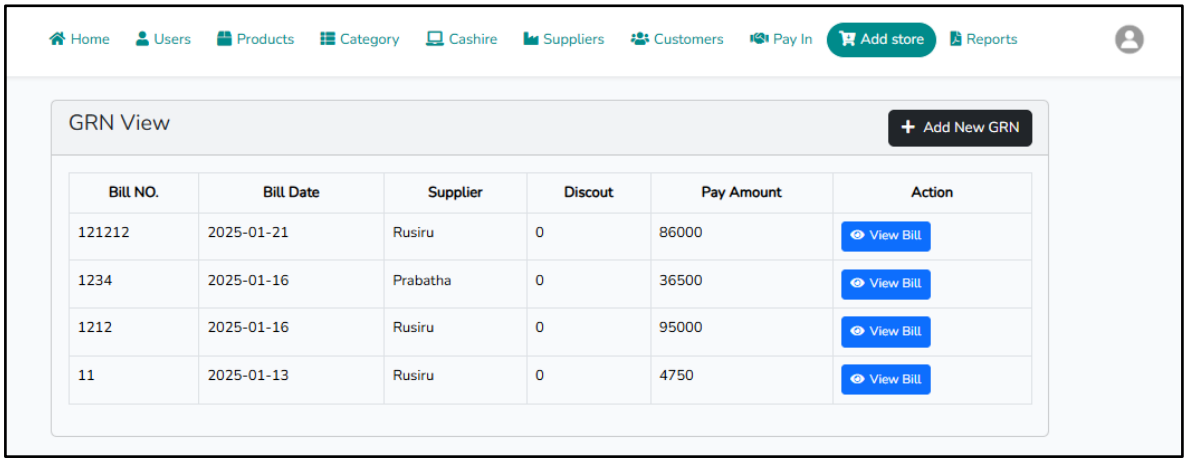
11. GRN (Goods Receipt Note) Management

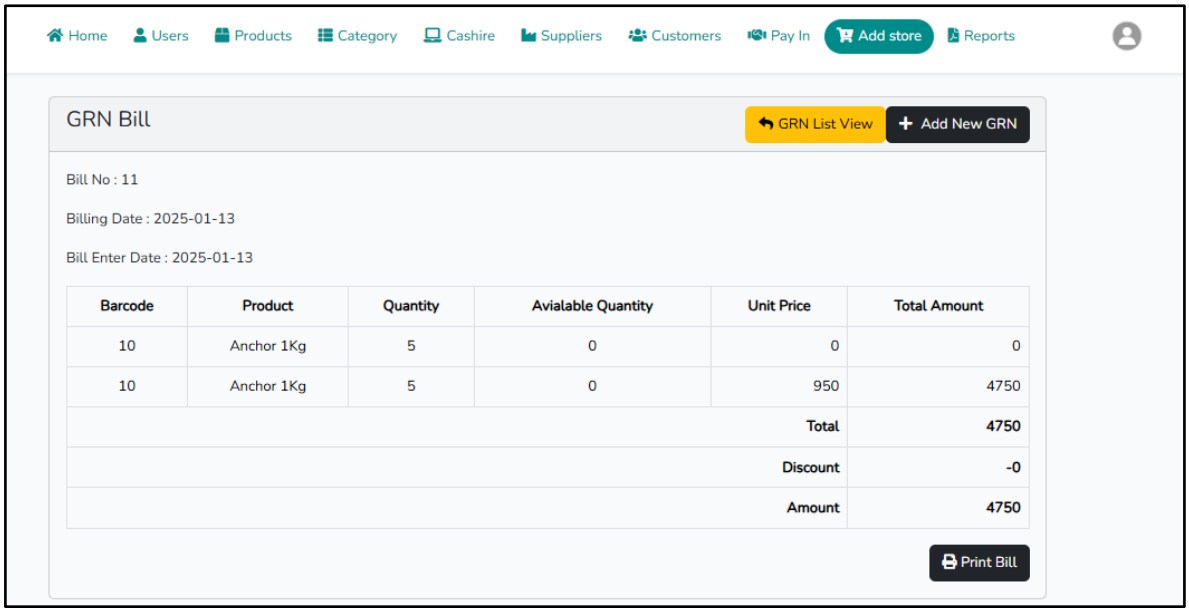


11.1. Adding Products to GRN



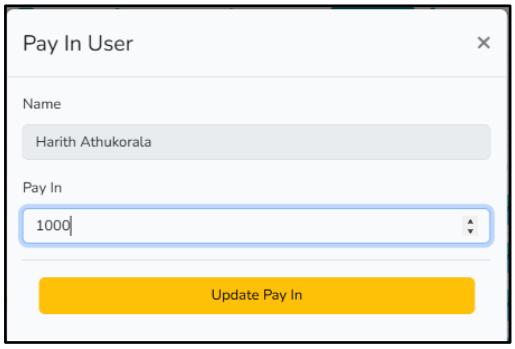
11.2. Viewing GRN Bills and GRN Lists

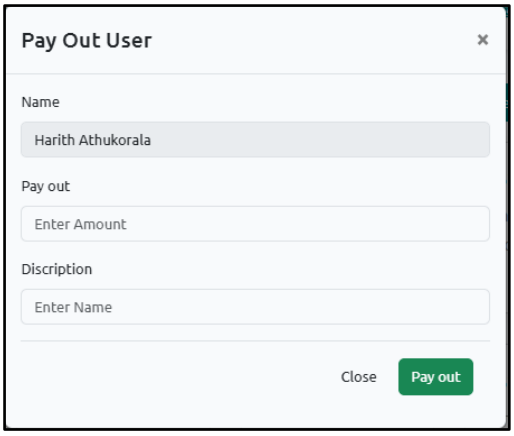




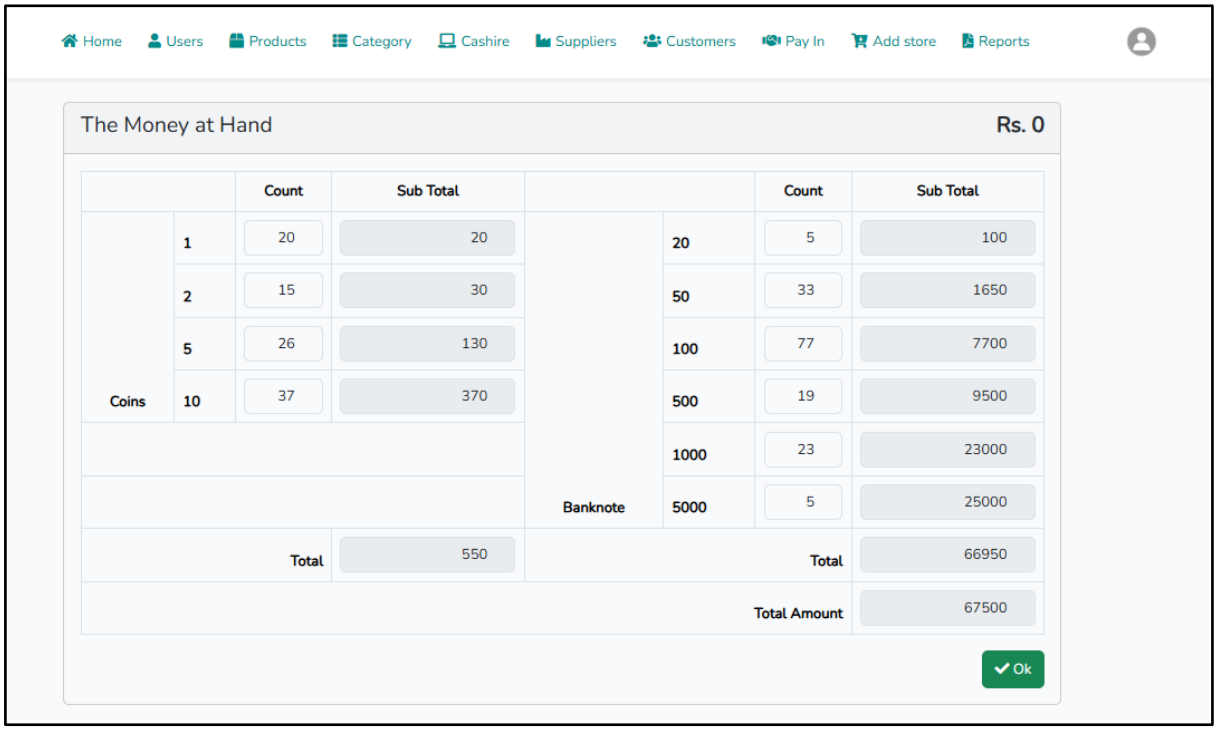
12. Payin and Payout Management

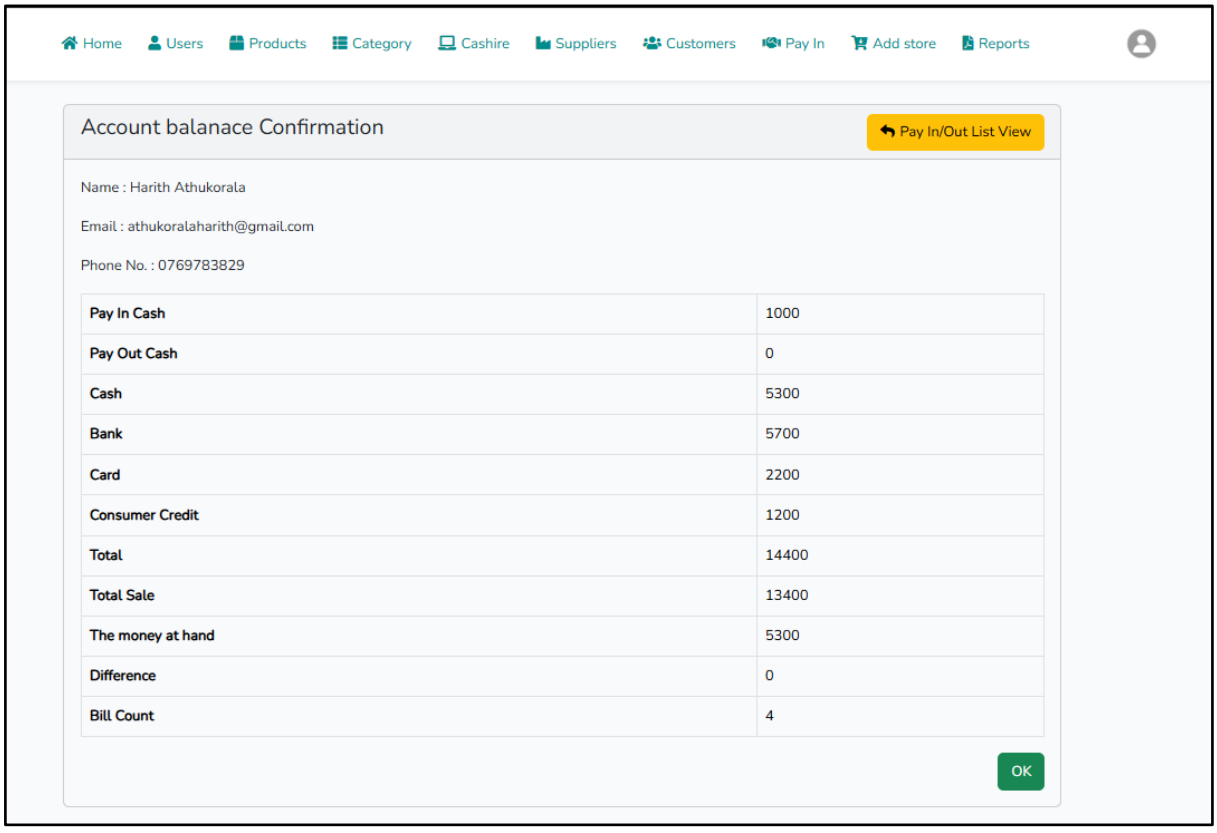
12.1. Recording Payin & Payouts Transactions





12.2. Balancing & confirmation User Accounts

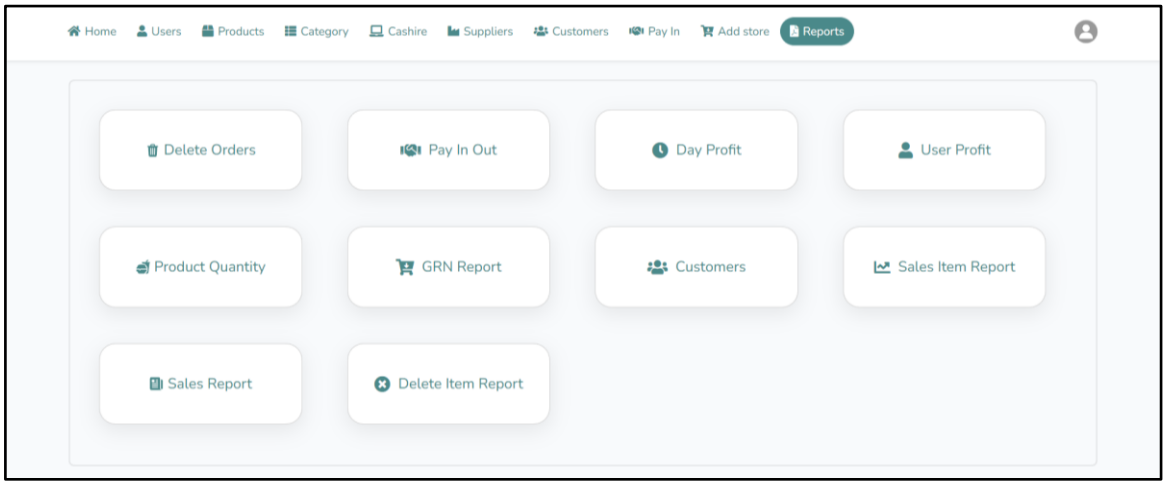




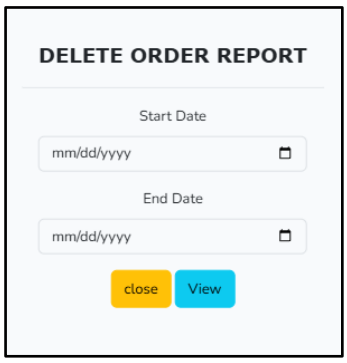
13. Reports and Analytics

13.1. Types of Reports

- Delete Orders Report
- Payin/Payout Report
- Day Profit Report
- User Profit Report
- Product Quantity Report
- GRN Report
- Customer Report
- Sales Item Report
- Sales Report
- Delete Item Report

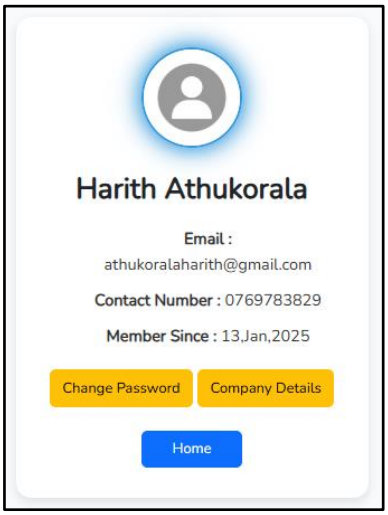


13.2. Using Date Ranges for Generating Reports

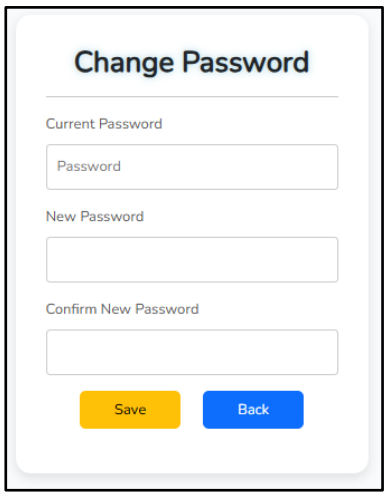


14. Profile and Company Management

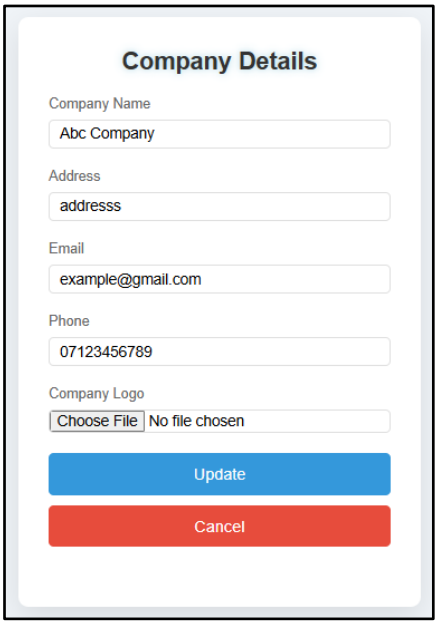
14.1. Updating Admin Profile Details



14.2. Changing Password



14.3. Managing Company Information



15. Appendices

15.1. Glossary of Terms

- **Admin User:** A user with full access to all features and functionalities of the POS system, including managing users, products, reports, and system settings.
- **Regular User:** A user with restricted access, typically limited to cashier operations, basic reporting, or other specific tasks assigned by an admin.
- **Home Page:** The default landing page upon logging in, displaying user-specific information and key metrics.
- **Navigation Bar:** The menu located at the top or side of the interface, allowing users to access various modules and features of the POS system.
- **Module:** A section of the system dedicated to a specific function, such as Users, Products, Categories, Cashier, Suppliers, or Reports.
- **Cashier Page:** A module where products are scanned or entered for checkout, and payments are processed.
- **Cart:** A virtual container for items being purchased during a transaction.
- **GRN (Goods Received Note):** A record of goods received from suppliers, managed through the "Add Store" module.
- **Payin Page:** A module where users record funds provided to them for daily operations.
- **Permission:** The level of access granted to a user, determining which pages, features, or actions they can use.
- **Role:** A predefined set of permissions assigned to a user, such as Admin or Regular User.
- **Alert Stock:** A threshold value set for products; an alert is triggered when stock levels fall below this value.
- **Alert Amount:** A limit set for customer loans; an alert is triggered when a customer's outstanding loan exceeds this amount.
- **Daily Report:** A summary of all transactions or activities recorded by a user during a specific day.
- **Delete Item Report:** A report showing details of items added to an invoice but later removed before completing the transaction.
- **Discount:** A reduction applied to the price of a product or total order during checkout.
- **Hold Order:** Temporarily saving an order in progress to allow the user to process another order and retrieve the held order later.

- **Loan:** An arrangement where a customer is allowed to defer payment for their purchase.
- **Low Stock Alert:** A notification indicating that the stock of a product has fallen below its alert stock threshold.
- **My Profile:** A section where users can update their personal details, change passwords, and (for admins) edit company information.
- **Permissions Management:** The process by which admins assign, edit, or revoke user permissions.
- **POS (Point of Sale):** A system that handles transactions, inventory, and customer data at the point of purchase.
- **Product Search:** A search bar available in the product module for quickly finding specific items based on their details.
- **Reports Page:** A module for generating various reports, such as sales summaries, profit analysis, or deleted items.
- **Transaction:** Any activity that involves the movement of funds or inventory, such as a sale, payment, or payout.
- **User Management Page:** A module where admins can add, edit, or deactivate user accounts and manage their roles and permissions.

15.2. Contact Support

Harith - athukoralaharith@gmail.com (+94 76 978 3829)
Deshan - lahirujayawardana6@gmail.com (+94 76 531 5828)
Bhathiya - jehandulanja04@gmail.com (+94 71 435 7500)
Sahan - sahanchamara151@gmail.com (+94 76 857 8915)
Prabath - prebathlamarakoon@gmail.com (+94 77 822 0257)