USER MANUAL

UBOLD POS AND ERP

ICBT KANDY CAMPUS

CSE5015

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# Login

The 1st page that will appear when the user opens the web-based ERP. In here please enter the email address and password the administrator gave.

A screenshot of a login form

Description automatically generated

Once successfully logged in dashboard will appear.

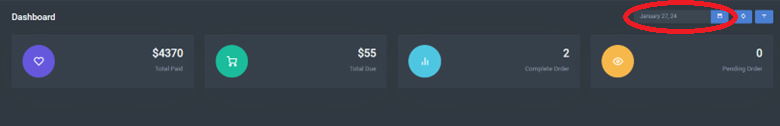
A screenshot of a computer

Description automatically generated

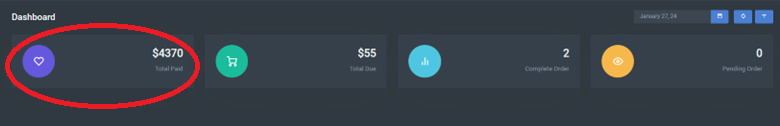
All the available functionalities will appear in the sidebar of the web application.

# Dashboard

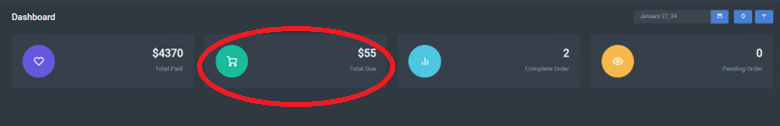
Dashboard Shows that day’s statics.



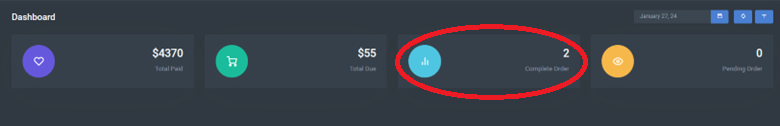
In here Total Sales can be seen as per that day.



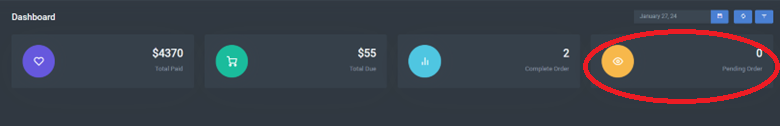
In here Total Due can be seen.



In here number of Completed Orders can be seen.

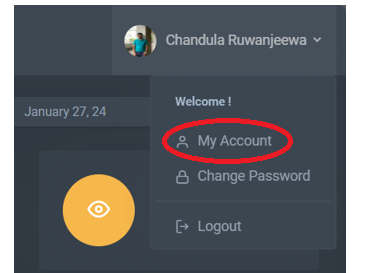


In here number of Pending Orders can be seen.



# Profile

Once logged in go to My Account Section as follows.

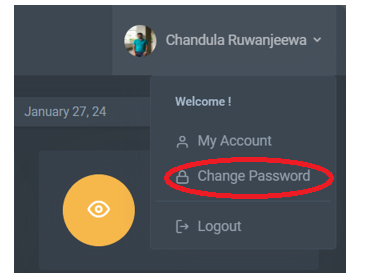


Then details can be updated by editing the current records as follows.

A screenshot of a computer

Description automatically generated

If the user wants to update the password assigned by the administrator, go to change password as follows.



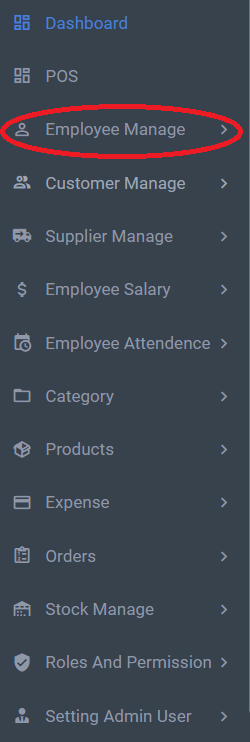
In here enter the current password and new password and then confirm it.

A screenshot of a video game

Description automatically generated

# Employee Management

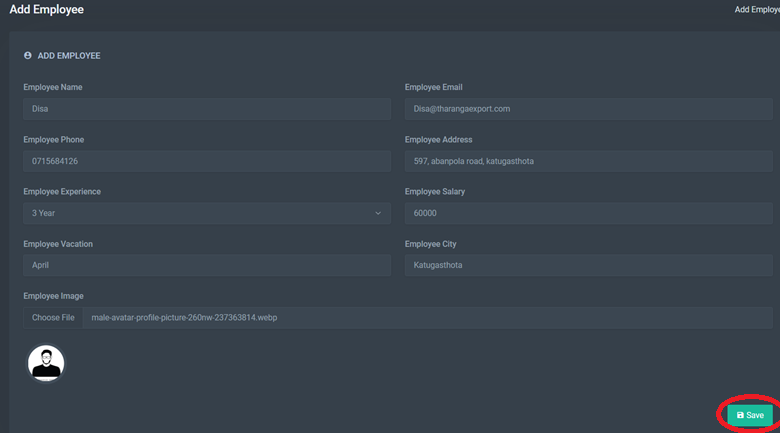
To go to employee management, select Employee Manage on Sidebar.



Employees can be added as follows.

A screenshot of a computer

Description automatically generated

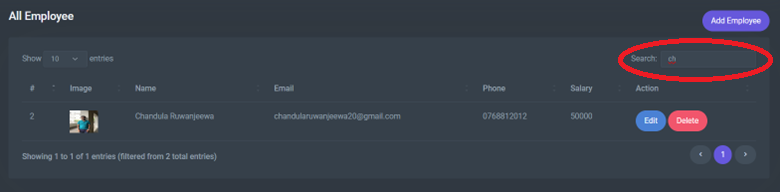


All the added employees will be seen as this.

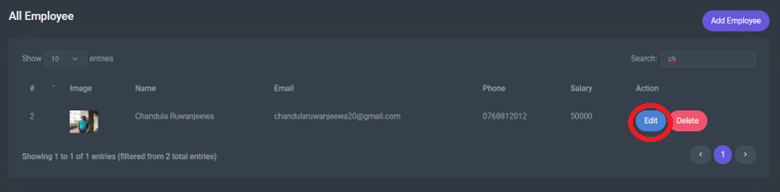
A screenshot of a computer program

Description automatically generated

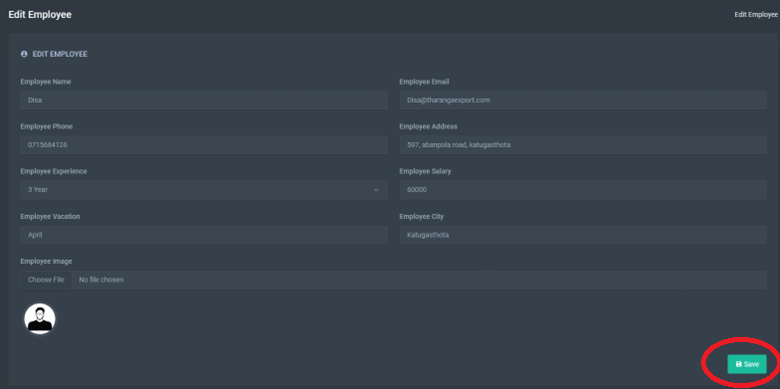
To search for employees, enter the details that you need to search for.



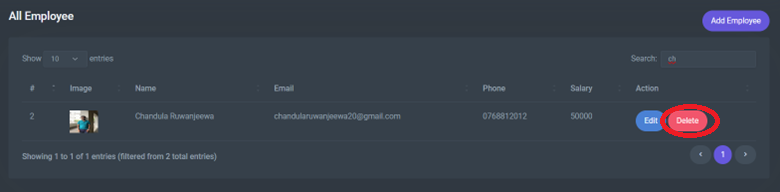
To Edit employee data, click the edit button on All Employees.

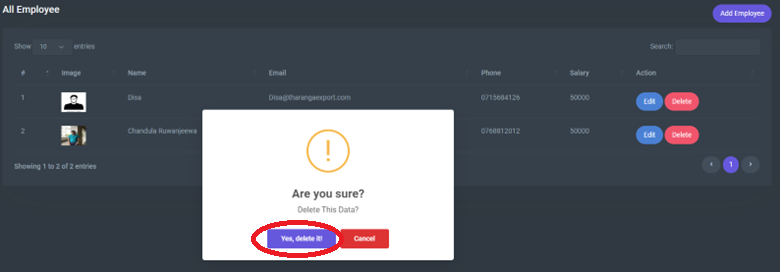


Then update the existing data and click save button.



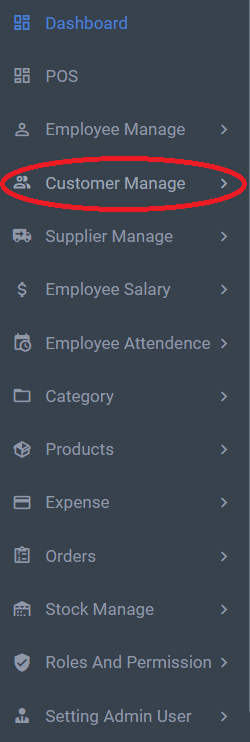
To delete an employee from the system, click the delete button from all employees and click Yes to delete.





# Customer Management

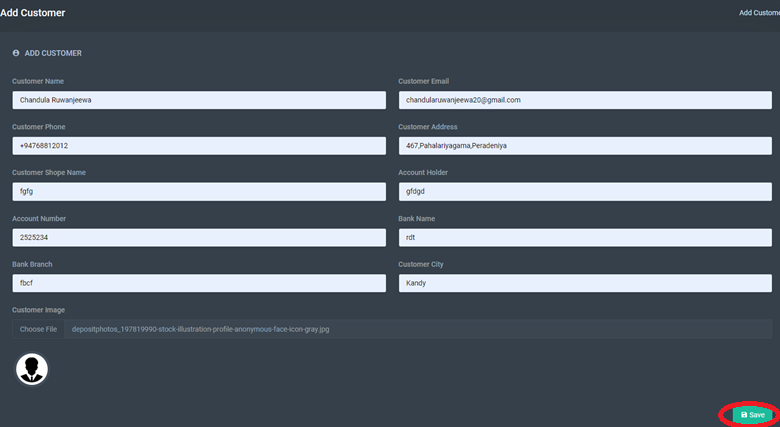
To go to customer management, select Customer Manage on Sidebar.



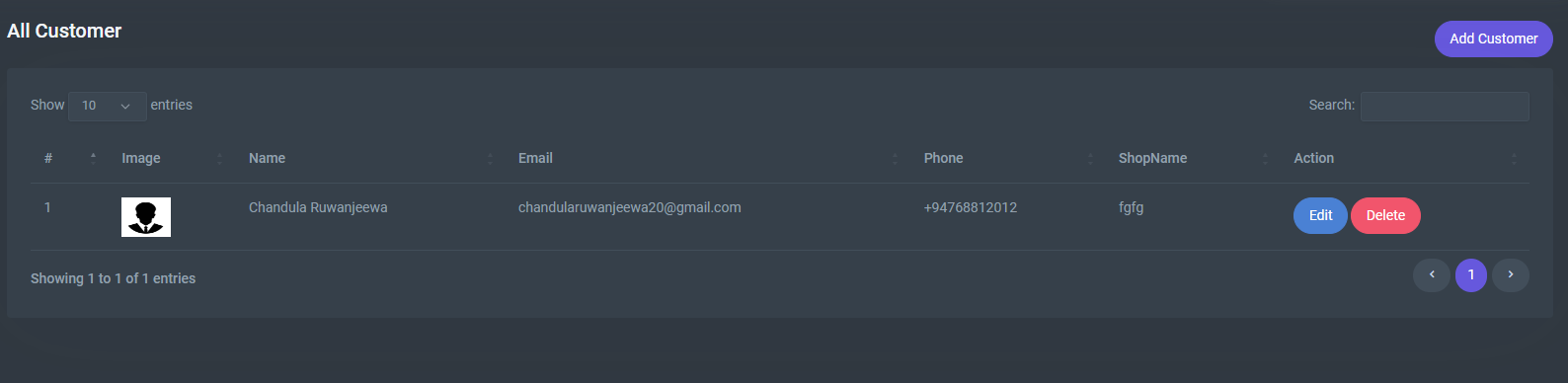
Customers can be added as follows.

A screenshot of a computer

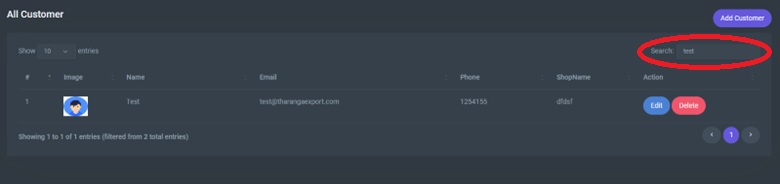
Description automatically generated



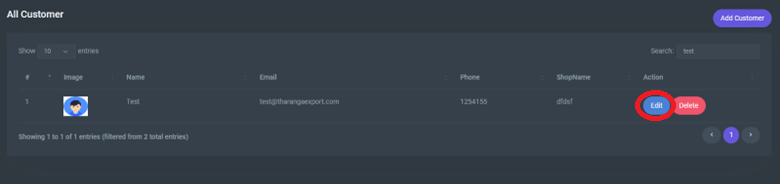
All the added customers will be seen as this.



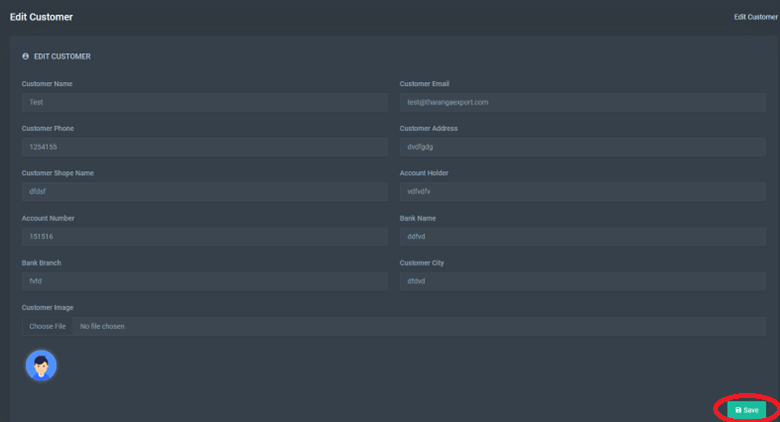
To search for a customer, enter the details that you need to search for.



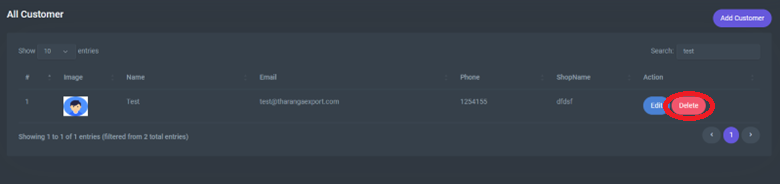
To Edit customer data, click the edit button on All Customers.

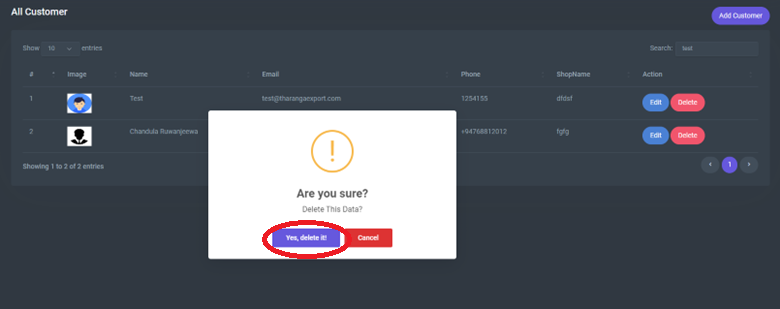


Then update the existing data and click save button.



To delete a customer from the system, click the delete button from all customers and click Yes to delete.





# Supplier Management

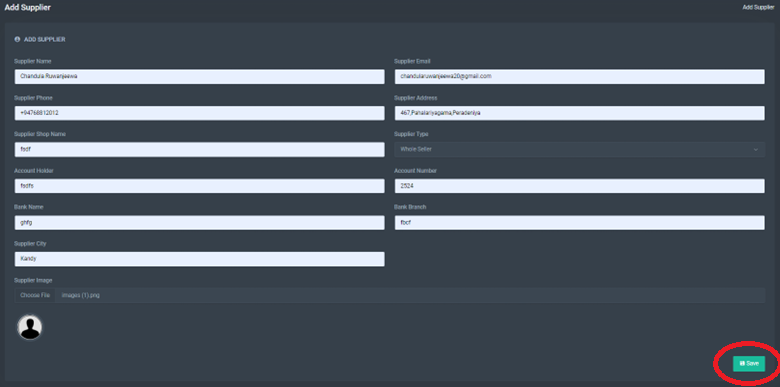
To go to supplier management, select Supplier Manage on Sidebar.



Suppliers can be added as follows.

A screenshot of a computer

Description automatically generated

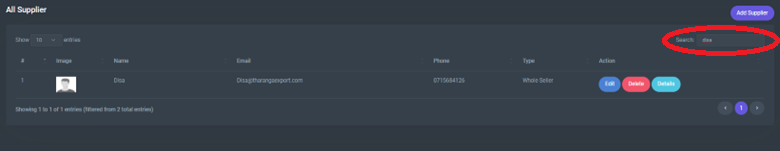


All the added suppliers will be seen as this.

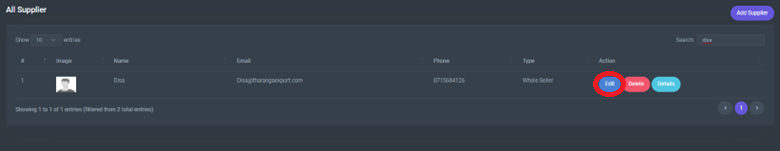
A screenshot of a computer

Description automatically generated

To search for a supplier, enter the details that you need to search for.



To Edit supplier data, click the edit button on All Suppliers.

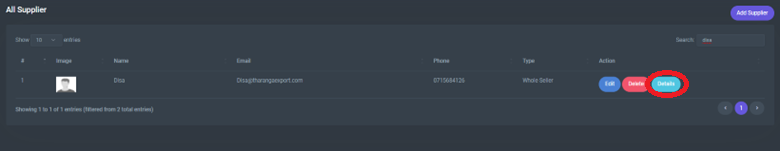


Then update the existing data and click save button.

A screenshot of a computer

Description automatically generated

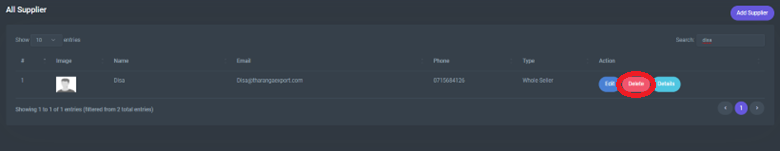
To view supplier data, click the details button on All Suppliers.

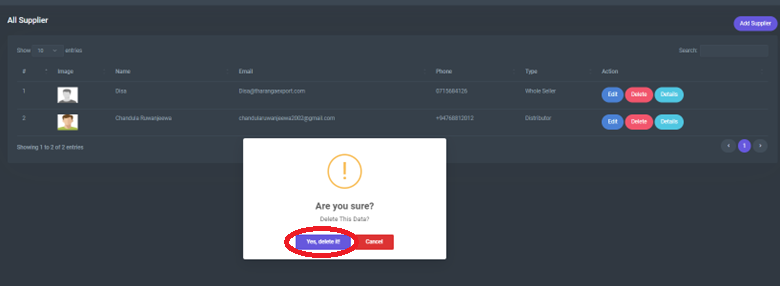


A screenshot of a computer

Description automatically generated

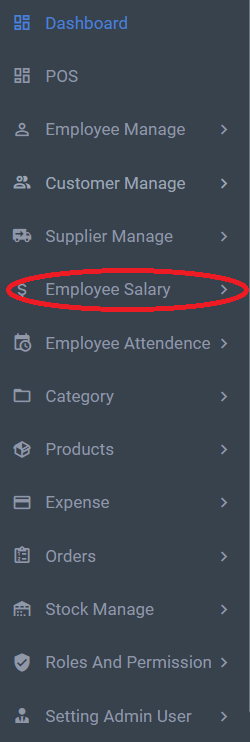
To delete a supplier from the system, click the delete button from all suppliers and click Yes to delete.

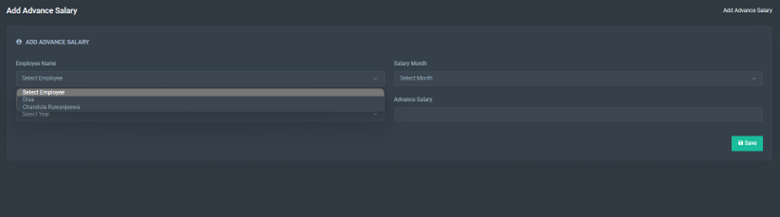


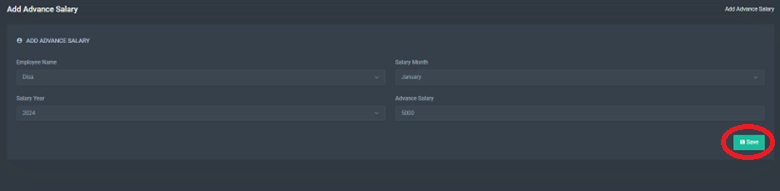


# Employee Salary

To add employee salary, go to Employee Salary from the sidebar to add advance salary.





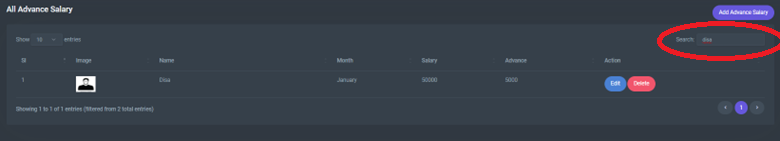


All the added advance salaries will be seen as this.

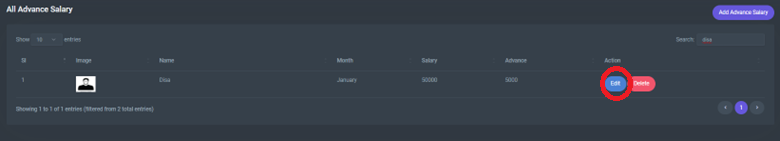
A screenshot of a computer

Description automatically generated

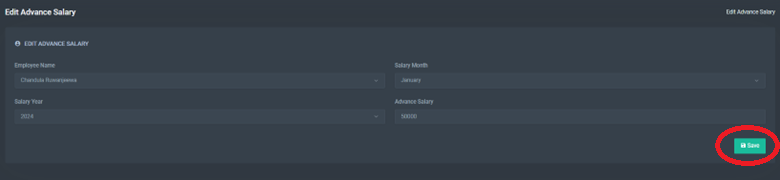
To search for an advance salary, enter the details that you need to search for.



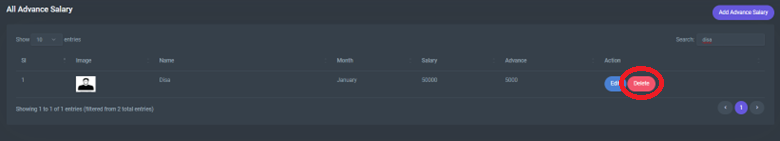
To Edit advance salary data, click the edit button on All Advance Salary.

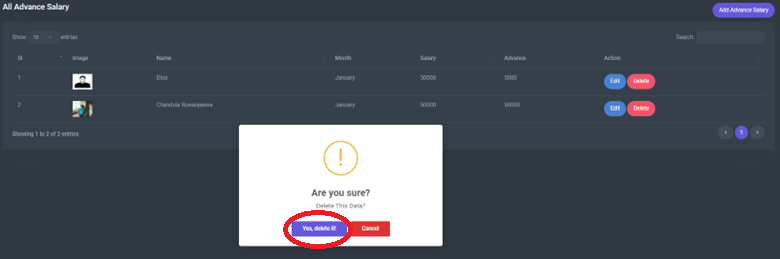


Then update the existing data and click save button.



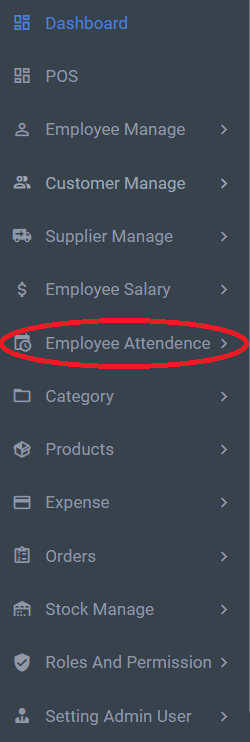
To delete an advance salary from the system, click the delete button from all advance salary and click Yes to delete.

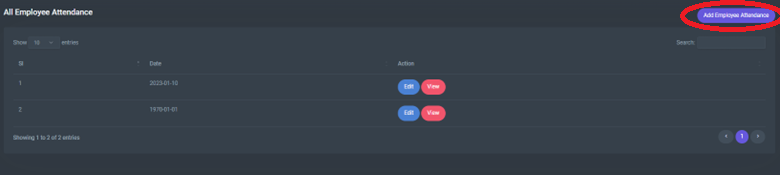


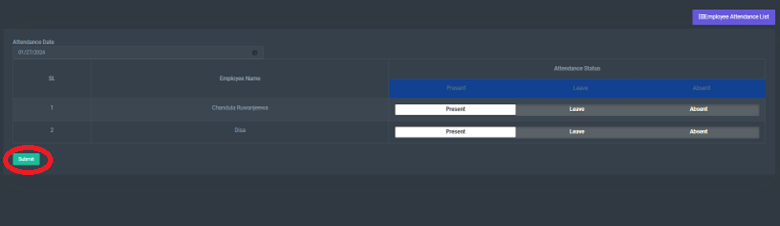


# Employee Attendance

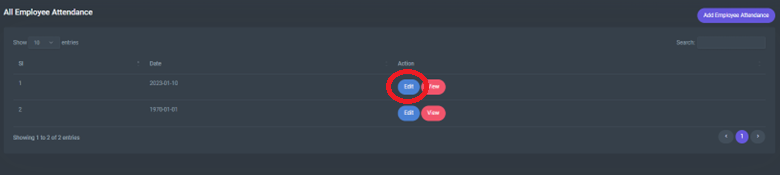
To add employee attendance, go to Employee Attendance from the sidebar to all advance salary.



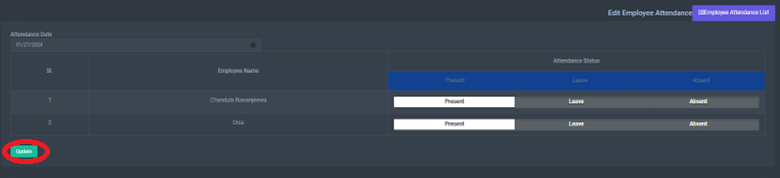




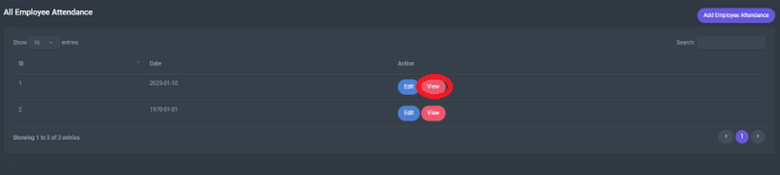
To Edit employee attendance data, click the edit button on All Employee Attendance.



Then update the existing data and click the update button.



To View employee attendance data, click the view button on All Employee Attendance.

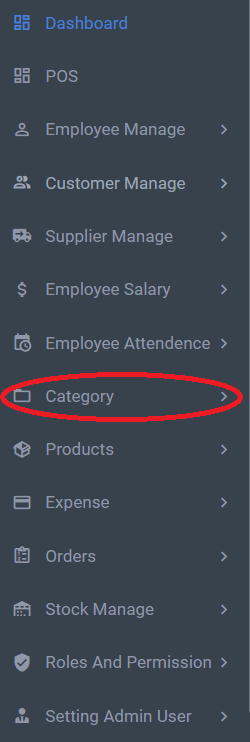


A screenshot of a computer

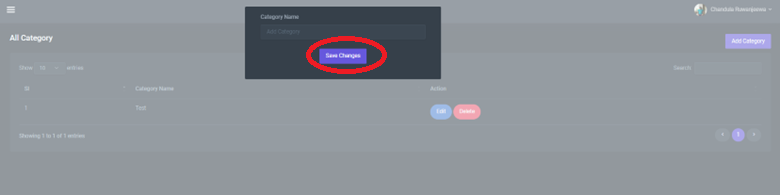
Description automatically generated

# Category Management

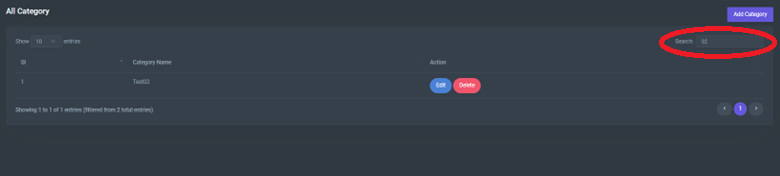
To add category, go to Category from the sidebar to all categories.



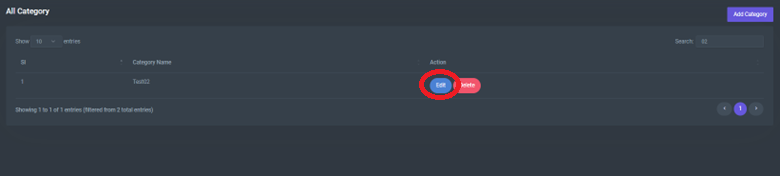




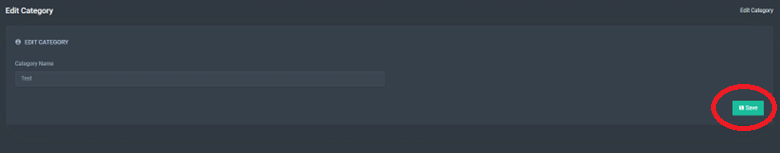
To search for a category, enter the details that you need to search for.



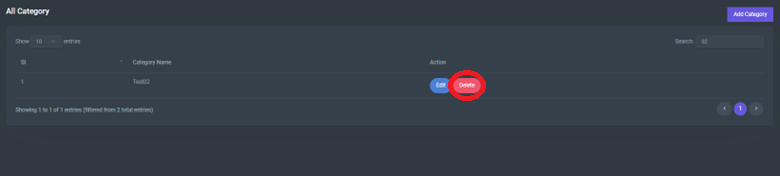
To Edit category data, click the edit button on All Category.

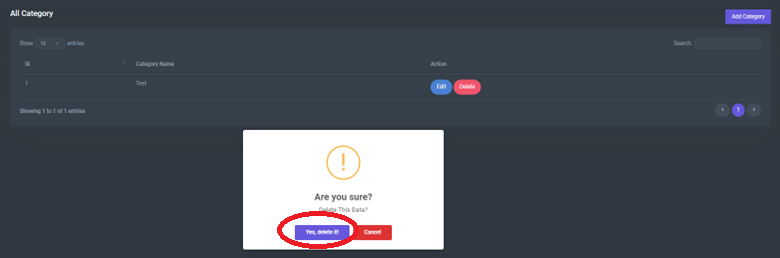


Then update the existing data and click save button.



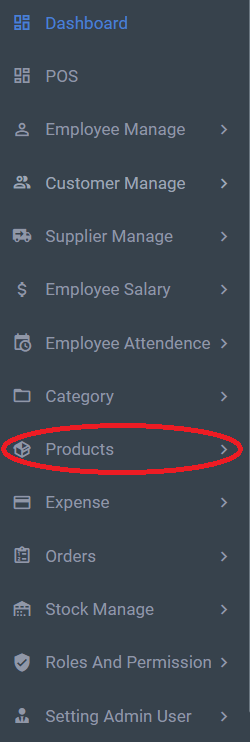
To delete a category from the system, click the delete button from all categories and click Yes to delete.





# Product Management

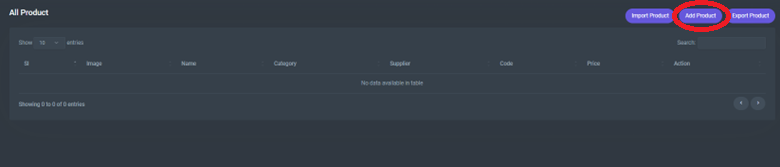
Go to Category from the sidebar to all Products.

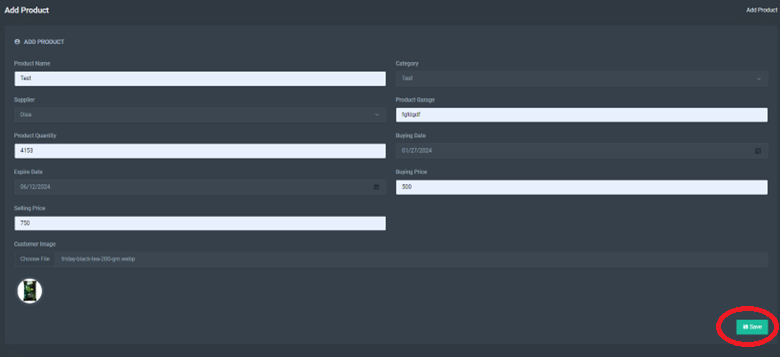


A screen shot of a computer

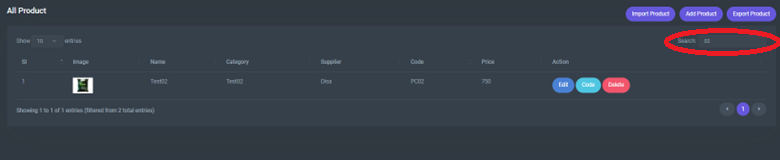
Description automatically generated

Products can be added as follows by clicking the save button at last.

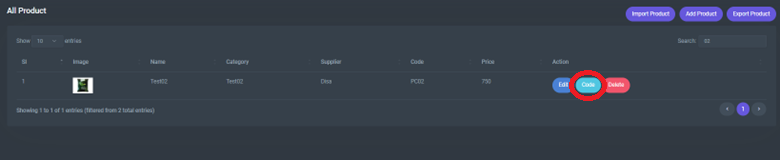




To search for a product, enter the details that you need to search for.



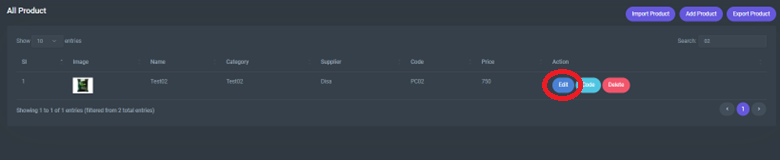
To get the product code and barcode, click the view button in All Product.



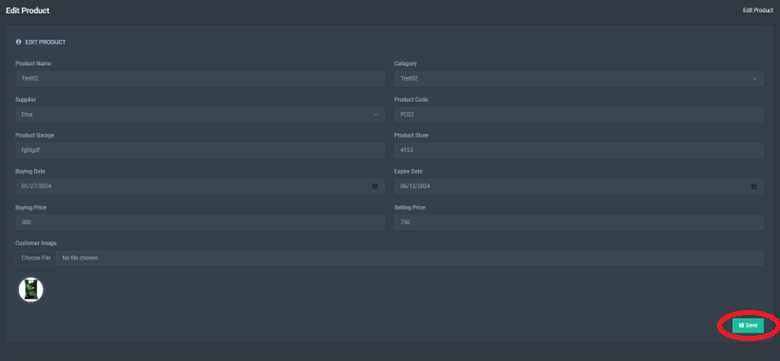
A bar code on a grey background

Description automatically generated

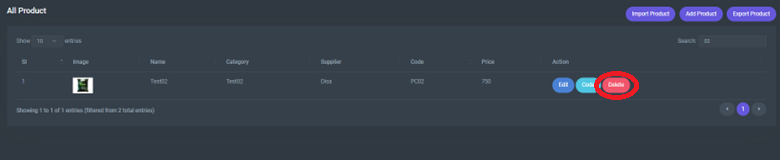
To Edit product data, click the edit button on All Product.

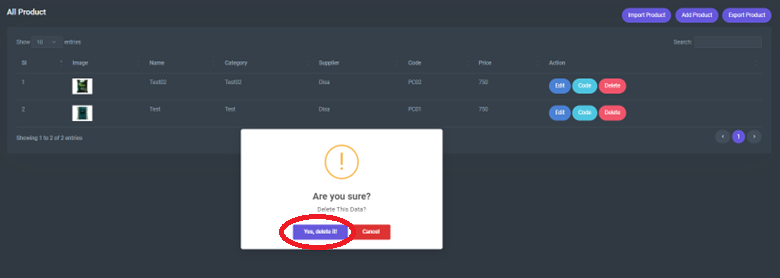


Then update the existing data and click save button.

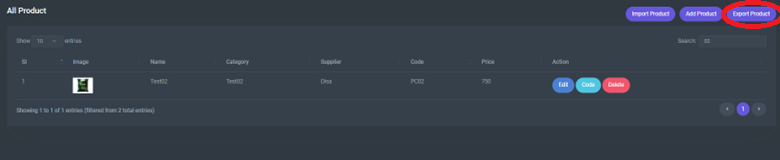


To delete a category from the system, click the delete button from all categories and click Yes to delete.





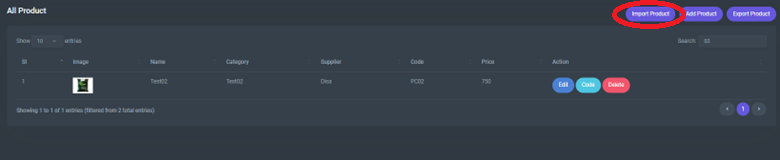
To export product details from the system to excel file, click the export button from all products.



A screenshot of a computer

Description automatically generated

To import product details to the system to excel file, click the import button from all products.

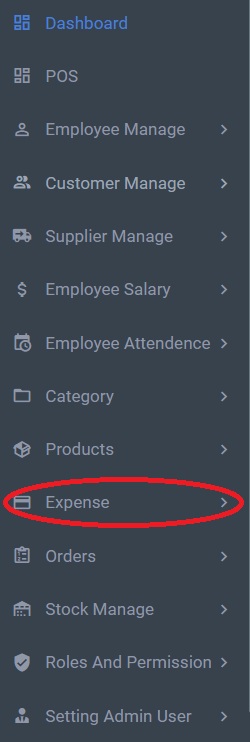


A blue and white background

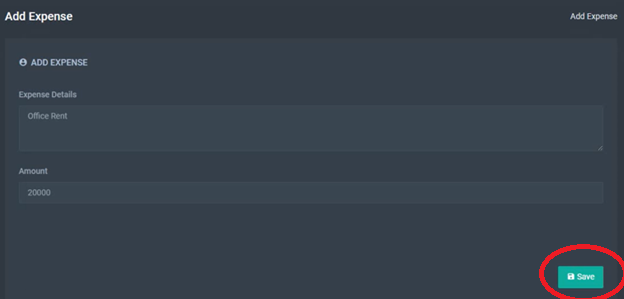
Description automatically generated with medium confidence

# Expense Management

Go to Expense from the sidebar.

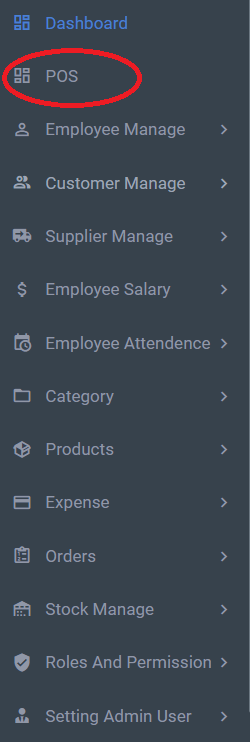


To add expense, go to add expense from the sidebar.



# POS

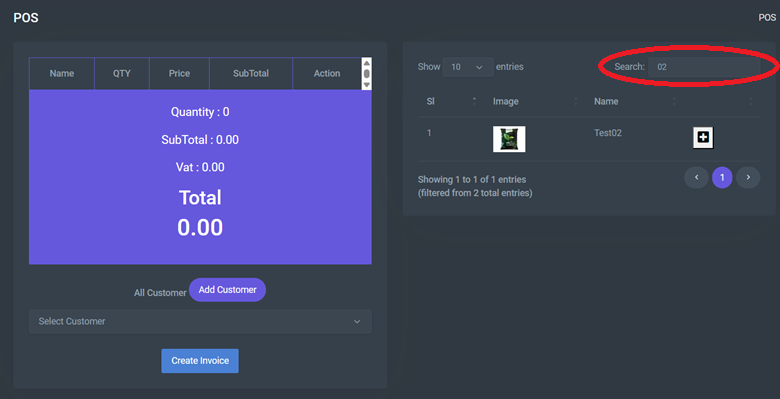
Go to POS from the sidebar.



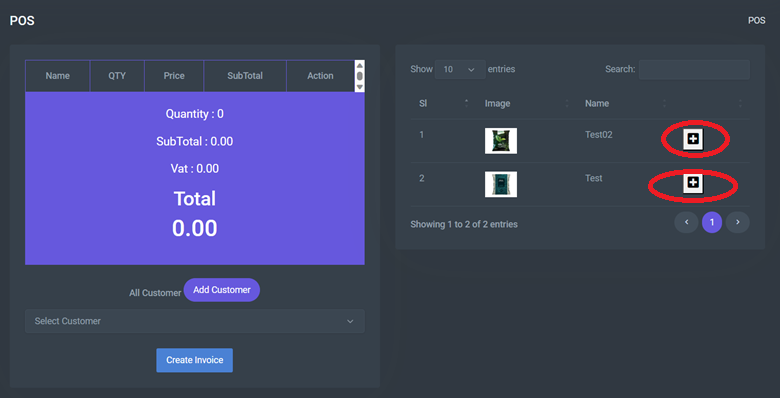
Screens screenshot of a computer

Description automatically generated

Search from products area to find the required product.



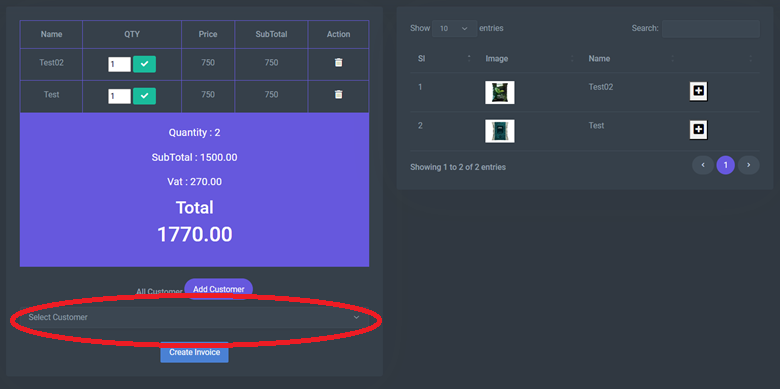
Click the plus icon to load products to cart.

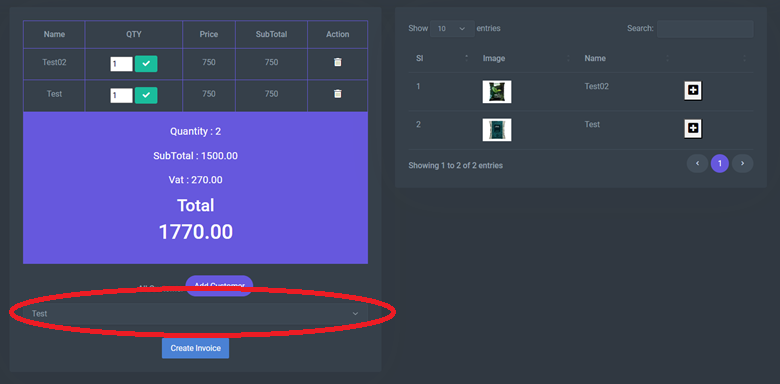


A screenshot of a computer

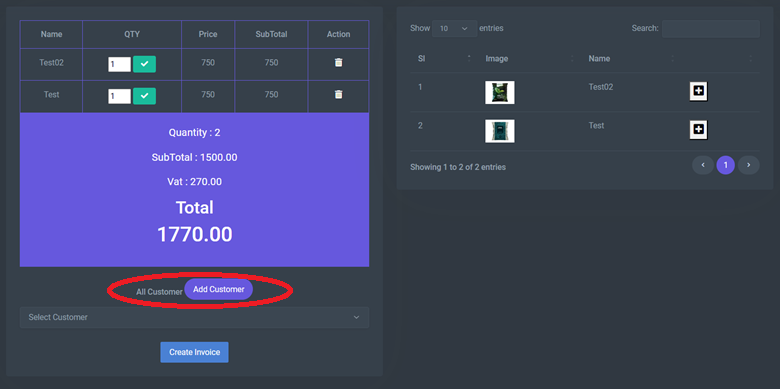
Description automatically generated

Select the Customer from the Dropdown.





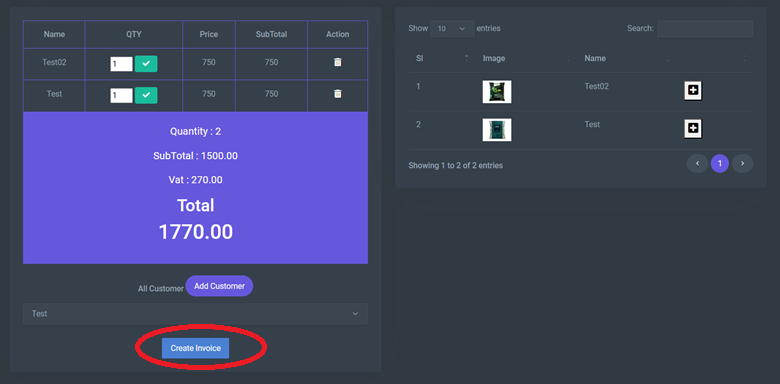
If need to add a customer click Add Customer button view goes to add customer page.



A screenshot of a computer

Description automatically generated

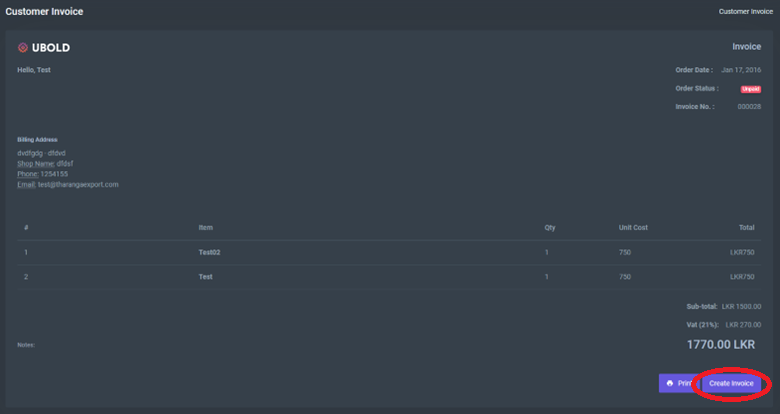
After selecting the customer click on Create Invoice to get the invoice.



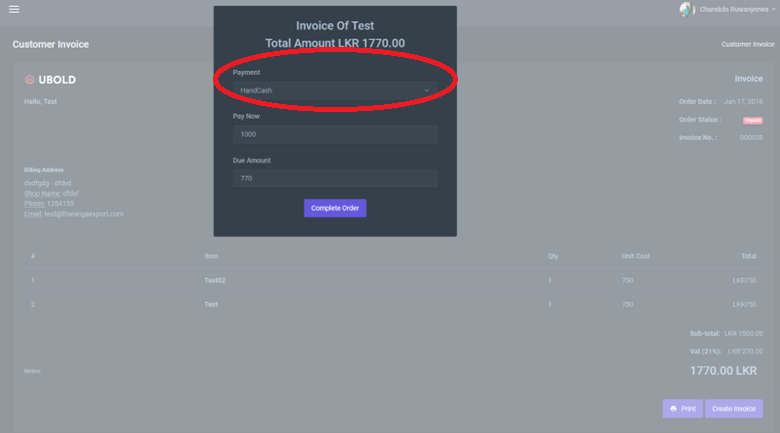
A screenshot of a computer

Description automatically generated

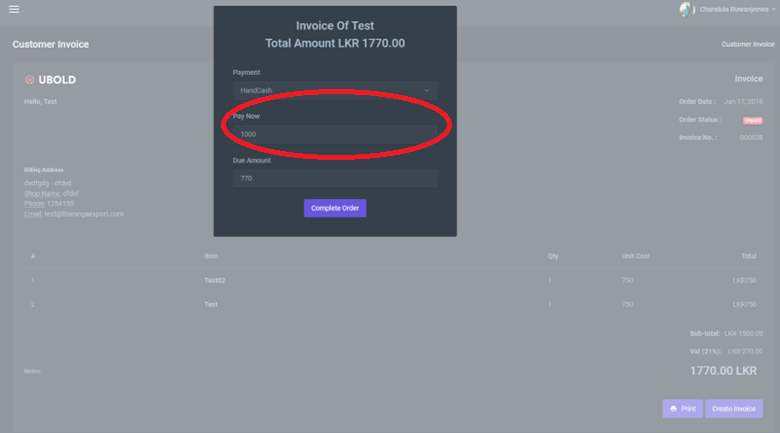
After getting the invoice Click Create Invoice to place the order.

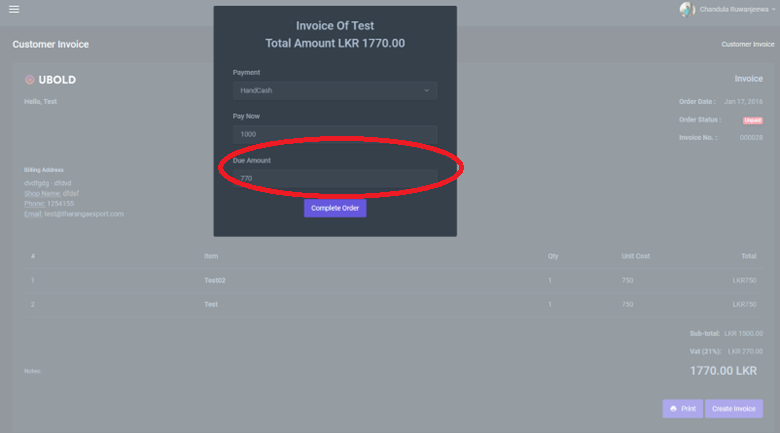


Then choose the payment method from the popup.



Then add the initial and due payments.





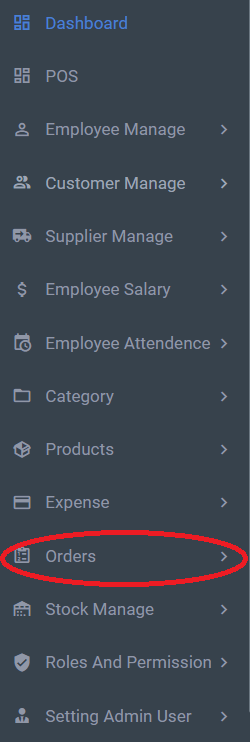
Then the cart will clear itself.

A screenshot of a computer

Description automatically generated

# Order Management

Go to Orders from the sidebar.

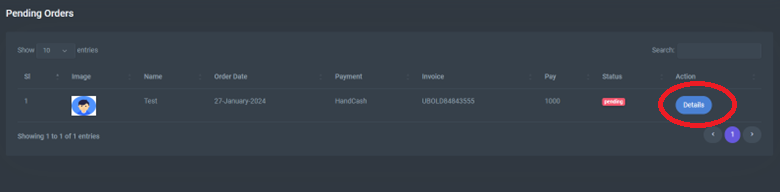


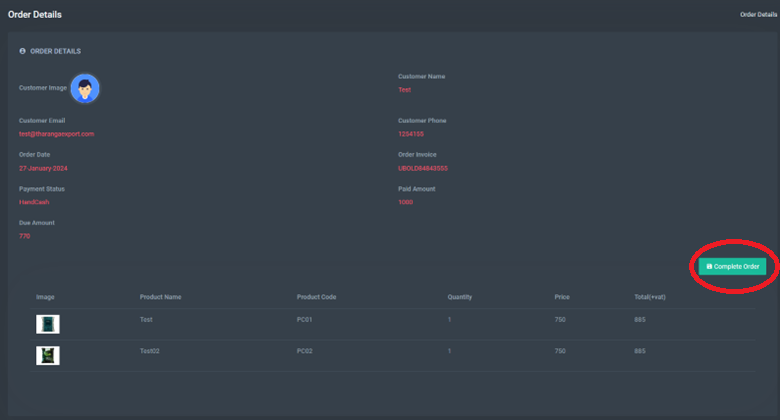
Go to Pending Orders from the sidebar to view all the Pending Orders.

A screenshot of a computer

Description automatically generated

Click on the Details button to view the order details and complete the order.



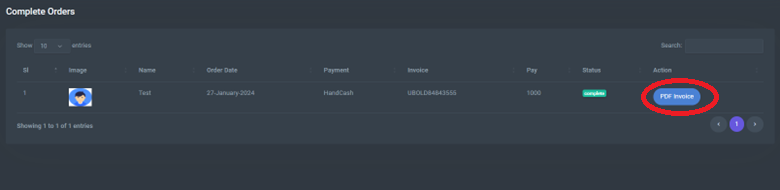


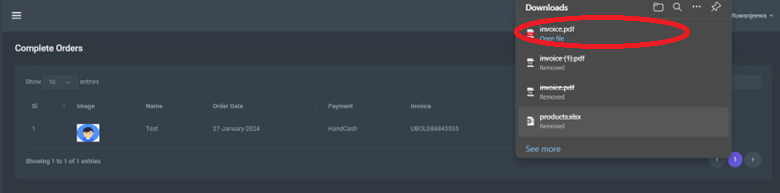
Then the pending order is transferred to complete orders. To get there go to Complete Orders from the sidebar to view all the Pending Orders.

A screenshot of a computer

Description automatically generated

To get the invoice for completed order will be as follows.





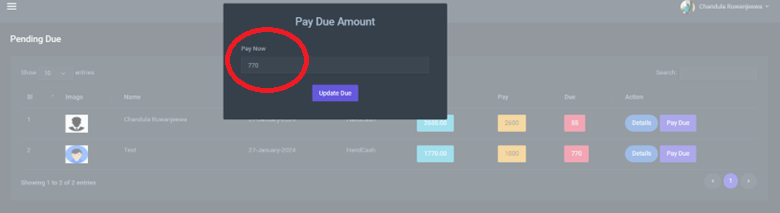
Once the order is completed. Go to pending Due from the sidebar. In here all the details regarding the payments can be found.

A screenshot of a computer

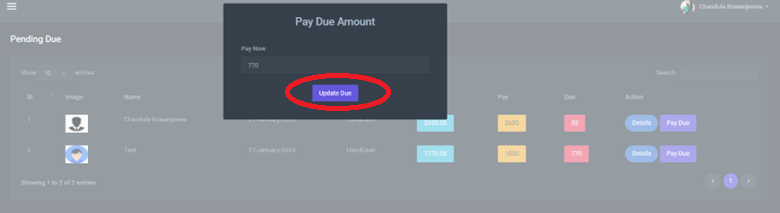
Description automatically generated

Once a customer settles a due payment it needs to be done as follows.

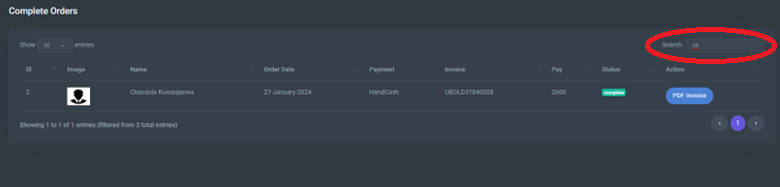
1st add the due payment amount.



Then click on Update Due.

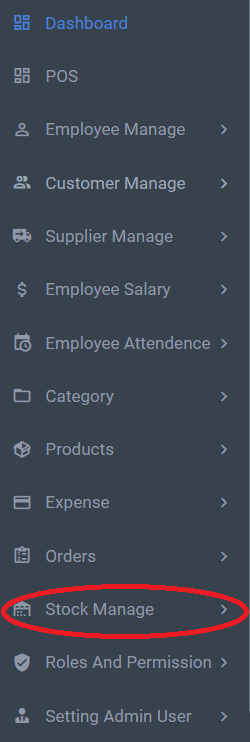


Orders can be searched as follows.

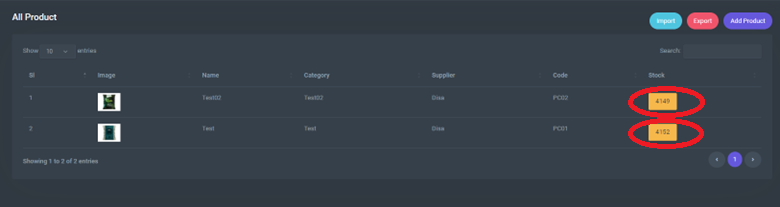


# Stock Management

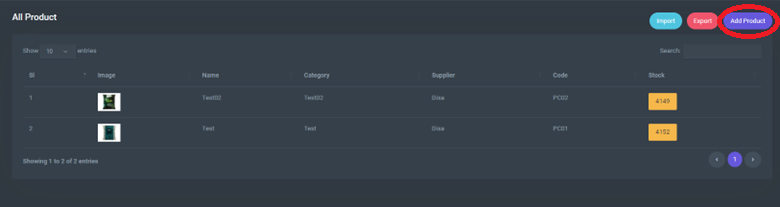
Go to Stock Manage from the sidebar.



In Here current stock levels can be seen as follows.



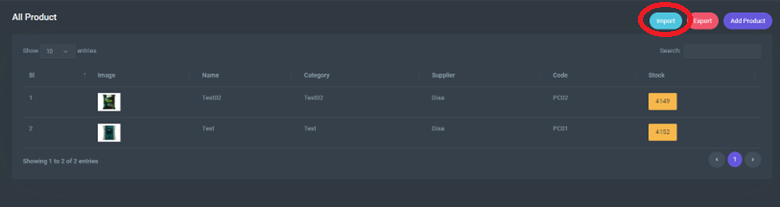
From here also new products can be added.



A screenshot of a computer

Description automatically generated

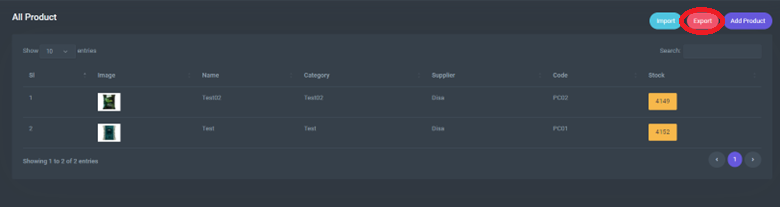
From here also products can be imported.

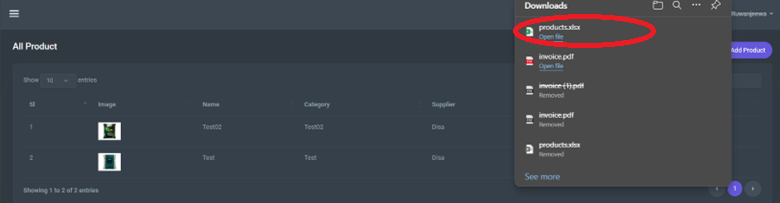


A black and white picture of a person

Description automatically generated with medium confidence

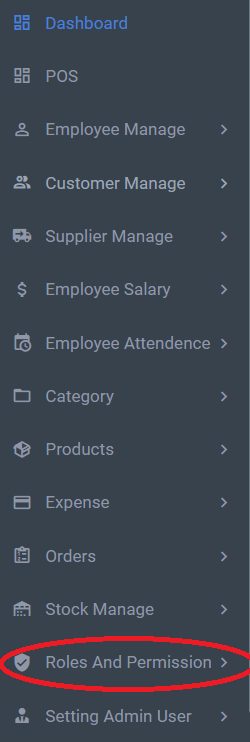
From here also products can be exported.





# Role and Permissions

Go to roles And Permissions from the sidebar.

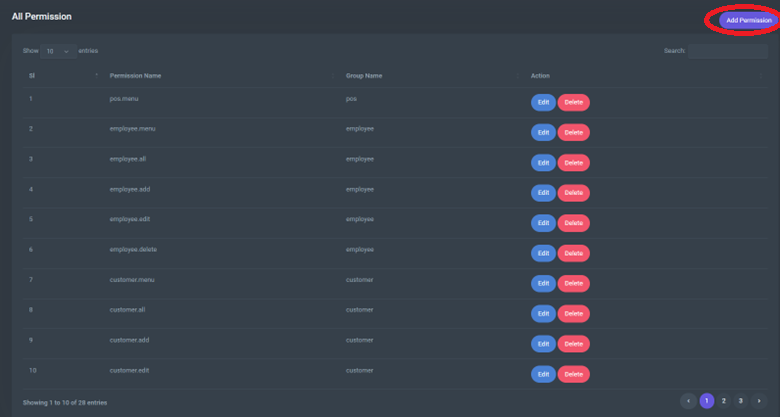


To view all the permissions, go to All Permissions from the sidebar.

A screenshot of a computer

Description automatically generated

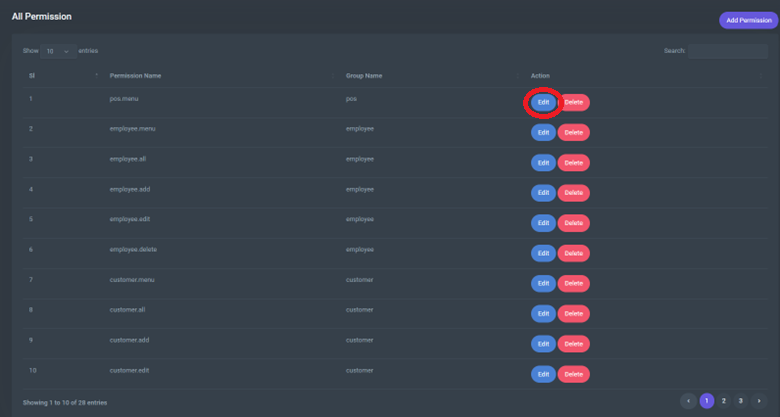
To add new permissions click Add permission from All Permissions.



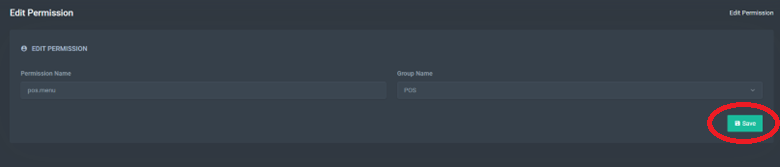
A screenshot of a computer

Description automatically generated

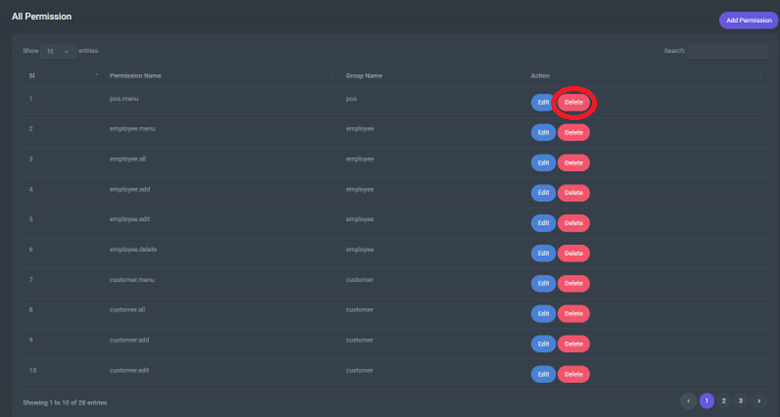
To edit permissions click Edit from All Permissions.

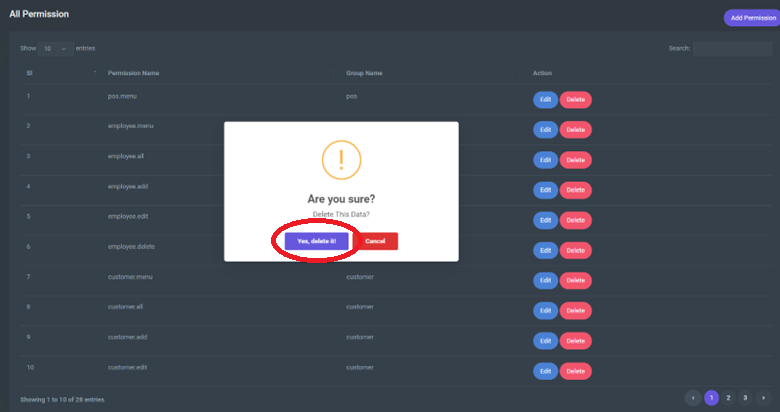


Update the existing data and click the save button.

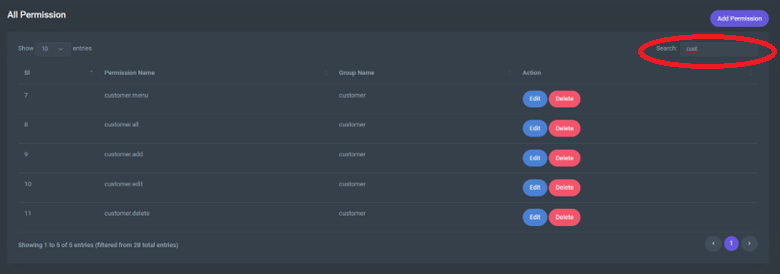


To delete a permission from the system, click the delete button from all permissions and click Yes to delete.





To search for permissions in the system click the search option from All Permissions.

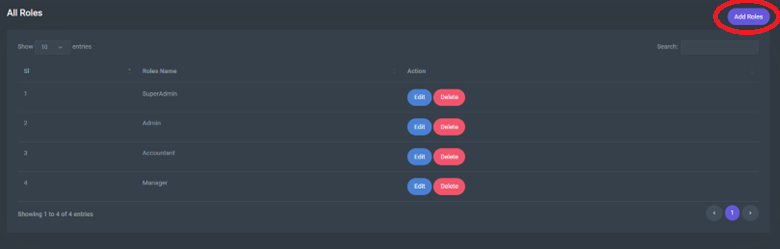


To view all the permissions, go to All Permissions from the sidebar.

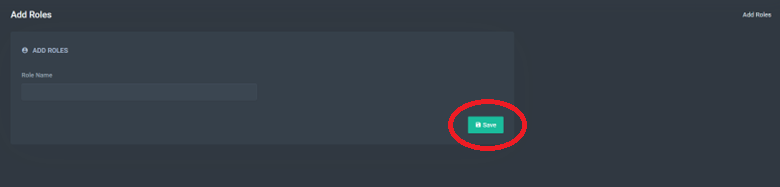
A screenshot of a computer

Description automatically generated

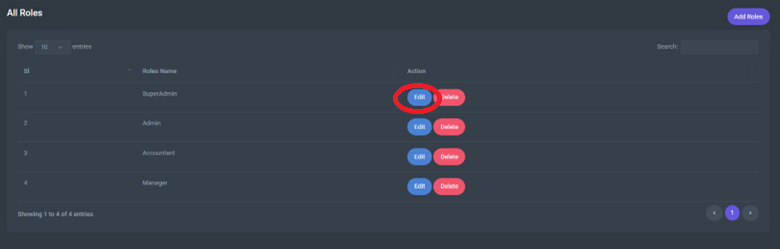
To add new permissions click Add permission from All Permissions.



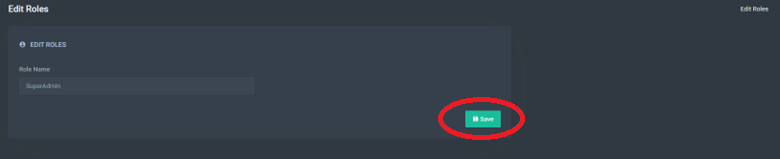
Name the role name and click the save button.



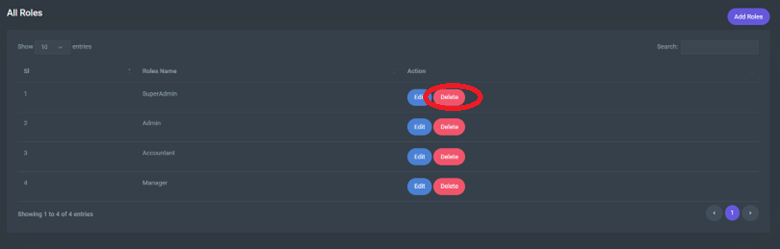
To edit role name click Edit from All Roles.

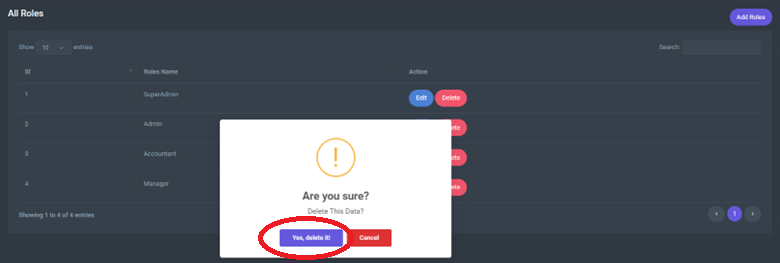


Update the existing data and click the save button.

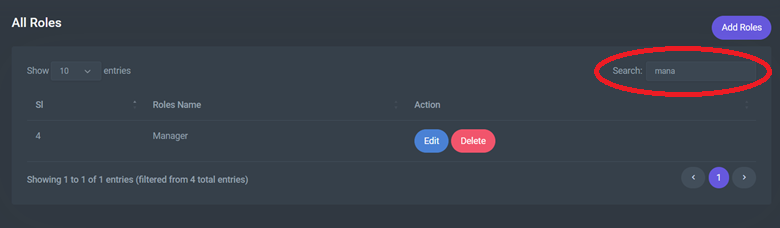


To delete a role from the system, click the delete button from all roles and click Yes to delete.





To search for a role in the system click the search option from All Roles.



To assign permissions to a role, go to Add Role in Permissions from the sidebar.

A screenshot of a computer

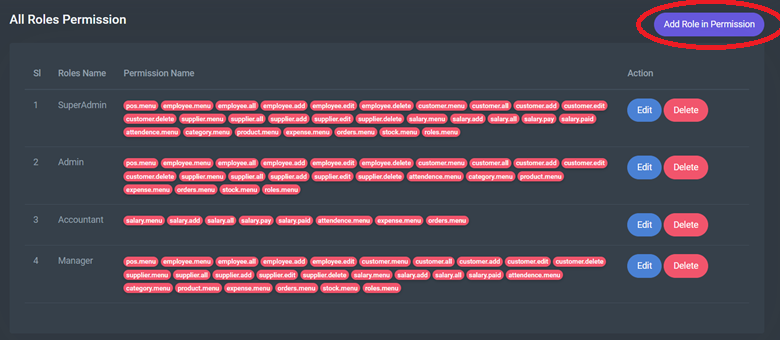
Description automatically generated

Once the permissions are added All Roles Permission will appear.

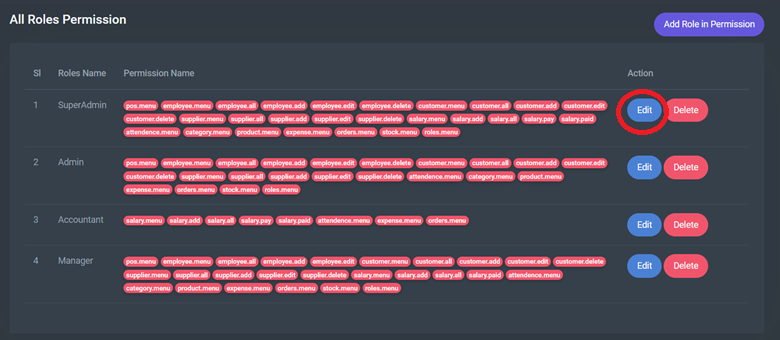
A screenshot of a computer

Description automatically generated

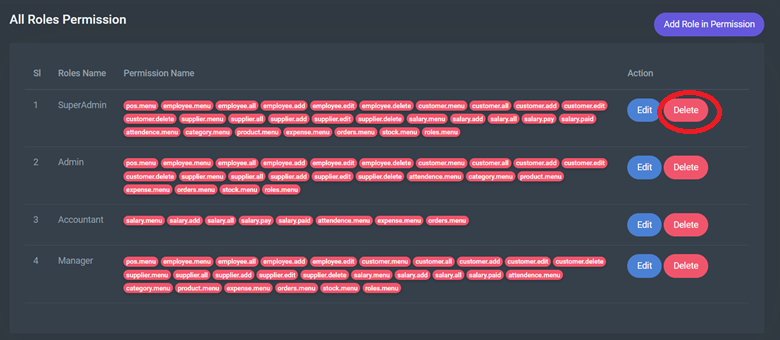
New permissions can be assigned by All Roles Permission page also.



Permission for a role can be done by editing in All Roles Permission page.



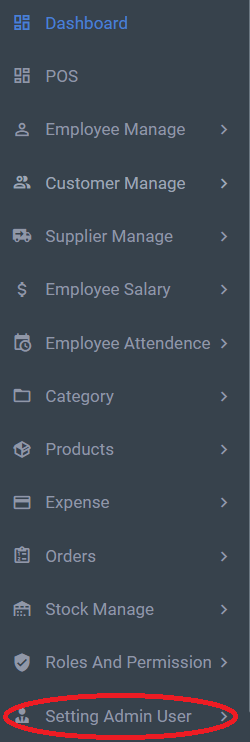
To delete Permission for a role from the system, click the delete button from all roles and click Yes to delete.





# Setting Admin Users

Go to Setting Admin User from the sidebar.

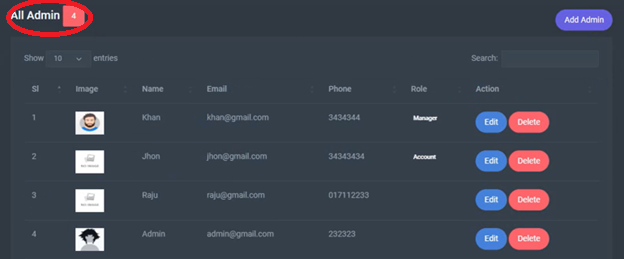


To view all the admins, go to All Admins from the sidebar.

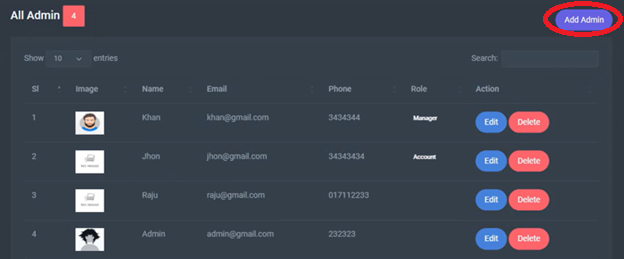
A screenshot of a computer

Description automatically generated

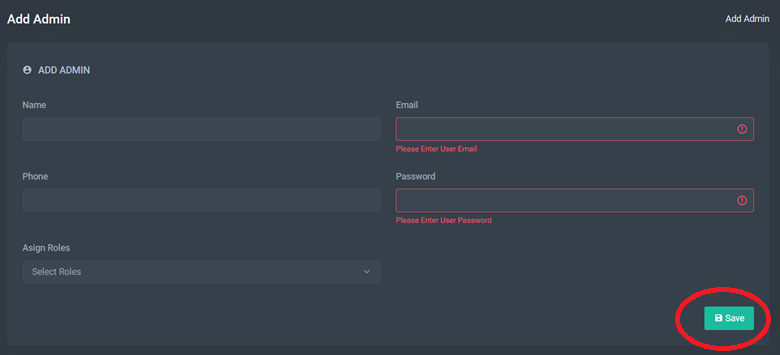
The number of available admins is shown here.



To add new admin user, click the Add Admin button from the All-Admins Page.



After adding data click the save button.



To edit role name click Edit from All Roles.



Update the existing data and click the save button.



To delete a admin from the system, click the delete button from all roles and click Yes to delete.

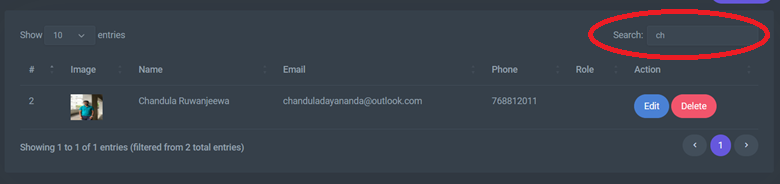
A screenshot of a computer

Description automatically generated

A screenshot of a chat

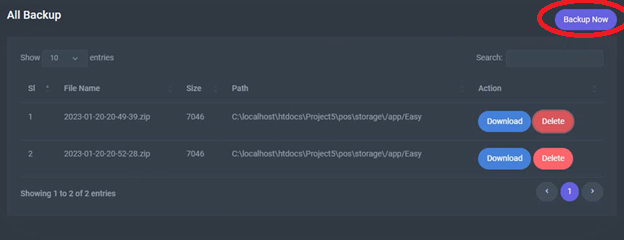
Description automatically generated

To search for an admin in the system click the search option from All Roles.

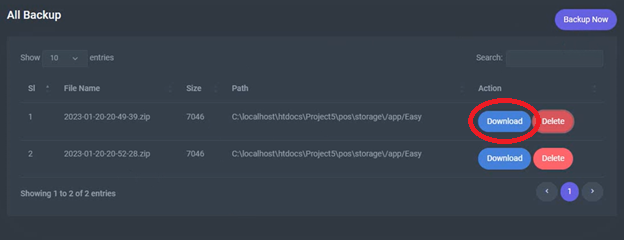


# Database Backup

By clicking the Backup Now Button backup will be created.



Backup can be downloaded by Download Button.



Backup can be deleted by Delete Button.

