ProdActive User Manual

Welcome to the ProdActive Point-of-Sale (POS) system! This manual provides a comprehensive guide to using ProdActive for your E-Boutique, helping you manage sales, inventory, and customer interactions efficiently.

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1. Introduction to ProdActive POS

System Overview

ProdActive is a robust Point-of-Sale (POS) system designed specifically for E-Boutiques. It streamlines daily operations, from managing product inventory to processing customer transactions and generating sales reports.

Key Features

- **Intuitive Interface:** Easy-to-navigate dashboard and clear workflows.
- **Inventory Control:** Real-time tracking of product stock, reorder points, and product details.
- **Sales Management:** Quick and efficient order processing, including discounts and multiple payment options.
- **User Roles:** Differentiated access levels for administrators and sales personnel.
- **Comprehensive Reporting:** Detailed insights into sales performance, product popularity, and user activities.
- **Customer Management:** Basic features to capture customer information (if applicable).

System Requirements

- Web browser (Chrome, Firefox, Edge, Safari)
- Internet connection

2. Getting Started

Logging In

1. Open your web browser and navigate to the ProdActive POS login page.
2. Enter your **Username** and **Password** in the respective fields.
3. Click the **"Login"** button.
4. If you forget your password, click **"Forgot Password"** and follow the prompts to reset it.

Dashboard Overview

Upon successful login, you will be directed to the main dashboard. The dashboard provides quick access to the primary functionalities of ProdActive POS:

- **Registration:** For managing user accounts (Admin only).
- **Inventory:** For adding, updating, and viewing product inventory.
- **Transaction:** For processing sales orders, returns, and exchanges.
- **Maintenance:** For system configurations and settings (Admin only).

- **Report:** For accessing sales and activity reports (Admin only).
- **Help:** Access this user manual and FAQs.
- **About:** Information about the ProdActive system.

3. User Management (Admin)

This section is for administrators only.

Adding New Users

1. Navigate to the **'Registration'** tab from the main dashboard.
2. Click on **'Add New User'** (or similar button).
3. Fill in the required user details, including:
    - Username
    - Password
    - Role (e.g., Admin, Sales Associate)
    - Security Questions (for password recovery)
4. Click **'Submit'** to create the new user account.

Modifying User Roles

1. Go to the **'Maintenance'** tab.
2. Select **'Manage Users'** (or similar option).
3. Locate the user account you wish to modify.
4. Click **'Edit'** next to the user's name.
5. Change the user's role or other details as needed.
6. Click **'Save Changes'**.

Deactivating User Accounts

1. From the **'Maintenance'** tab, select **'Manage Users'**.
2. Find the user account you want to deactivate.
3. Click **'Deactivate'** (or 'Disable') next to the user's name.
4. Confirm your action when prompted. Deactivated accounts cannot log in but their data remains in the system.

Password Reset

If a user forgets their password:

1. On the login page, click **"Forgot Password"**.
2. Enter the user's **Username**.
3. Answer the pre-set **Security Questions**.
4. Follow the instructions to set a new password.

4. Inventory Management (Admin)

This section primarily concerns administrators.

Registering New Products

1. Navigate to the **'Inventory'** tab from the main dashboard.
2. Click on **'Register Product'**.
3. Fill in all required product details, such as:
    - Product Name
    - SKU (Stock Keeping Unit)
    - Category
    - Description
    - Unit Price
    - Initial Stock Quantity
    - Supplier Information (if applicable)
    - Reorder Level (minimum stock before reordering)
4. Click **'Submit'** to add the product to your inventory.

Updating Product Information

1. From the **'Inventory'** tab, browse or search for the product you wish to update.
2. Click the **'Edit'** button located next to the product entry.
3. Modify the necessary fields (e.g., price, description, stock quantity).
4. Click **'Save'** to apply the changes.

Viewing Inventory Reports

1. In the **'Inventory'** tab, look for a section like **'Inventory Report'** or **'Stock Levels'**.
2. Here you can view current stock levels, low-stock alerts, and possibly historical inventory data.
3. Use available filters to sort by category, supplier, or stock status.

5. Transaction Processing

This section outlines the steps for processing customer orders.

Creating a New Order

1. From the main dashboard, click on the **'Transaction'** tab.
2. Select **'Create Order'**.
3. A new order screen will appear, ready for you to add items.

Adding Products to an Order

1. **Search/Scan Products:** Use the search bar to find products by name or SKU, or use a barcode scanner if integrated.
2. **Select Quantity:** Specify the quantity for each product.
3. **Add to Cart:** Click **'Add'** or press Enter to add the product to the order list.
4. **Review Order:** Ensure all desired products are listed with correct quantities and prices.

Applying Discounts

1. If a discount is applicable (e.g., percentage discount, fixed amount), locate the **'Discount'** field on the order screen.
2. Enter the discount value or select a pre-defined discount.
3. The system will automatically recalculate the total.

Processing Payments

1. Once all items are added and discounts applied, click **'Proceed to Checkout'** or **'Pay'**.
2. Select the **Payment Method**:
   - **Cash:** Enter the amount received from the customer. The system will calculate and display the change due.
   - **Credit/Debit Card:** Follow the prompts for card reader integration (if applicable).
   - **Mobile Payment:** Select the relevant mobile payment option.
3. Confirm the payment.

Handling Returns and Exchanges

1. From the **'Transaction'** tab, select **'Return/Exchange'** or **'View Past Orders'**.
2. Search for the original order using the order ID, customer name, or date.
3. Select the items to be returned or exchanged.
4. Follow the prompts to process the return (issuing a refund) or exchange (swapping items).

Printing Receipts

After a transaction is completed, the system will typically offer an option to print a receipt. Click **'Print Receipt'**.

6. Reporting (Admin)

This section is for administrators to view business performance.

Viewing Sales Reports

1. Navigate to the **'Report'** section from the main dashboard.
2. Select **'Sales Reports'**.
3. You can filter reports by:
    - Date Range (daily, weekly, monthly, custom)
    - Product Category
    - Payment Method
    - Sales Associate
4. Reports typically include total sales, average transaction value, and top-selling products.

Accessing Order Details

1. In the **'Report'** section, choose **'Order Details'** or **'Transaction History'**.
2. Search for specific orders to view their contents, payment status, and associated customer information.

Reviewing User Logs

1. From the **'Report'** section, select **'User Logs'** or **'Activity Log'**.
2. This log tracks actions performed by users within the system, such as product registrations, order creations, and updates, providing an audit trail.

7. Maintenance (Admin)

This section covers administrative tasks for system upkeep.

System Settings

1. Go to the **'Maintenance'** tab.
2. Here you can configure various system settings, such as:
    - Tax rates
    - Receipt footer messages
    - Currency settings
    - Printer settings

Backup and Restore

ProdActive POS automatically performs regular data backups. For manual backups or restoration requests, please contact your system administrator or support team.

8. Help and Support

Frequently Asked Questions (FAQ)

Refer to the "Help" section within the ProdActive POS application for a list of common questions and answers.

Contacting Support

If you encounter any issues or have questions not answered in this manual or the FAQ, please contact our support team:

- **Email:** qaotabiolo@tip.edu.ph, qcjlacerna@tip.edu.ph, qmjjomoc01@tip.edu.ph
- **Phone:** 09478478318, 09183720024

Thank you for using ProdActive!