

SALES AND INVENTORY MANAGEMENT APPLICATION

USER MANUAL



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Table of Contents

Introduction	4
Accessing the online system.....	4
System Requirements	4
Keeping your Credentials	4
Support and Feedback	4
Account Types	4
How to Log In	6
How to Register Account	7
How to Reset a Password	7
The Dashboard	8
Anatomy	8
Categories.....	9
How to use Category Management.....	10
Add Product.....	11
How to Add a New Product.....	12
Inventory	12
Anatomy	12
How to Adjust Stock.....	13
How to View Adjustment History:.....	14
How to Generate the Report	14
Create Sales	14
Anatomy	14
How to use Product to Sell	15
How to use POS Transaction.....	16
Create Purchase Orders	17
Purchase Orders.....	17
Anatomy.....	17
How to Create a Purchase Order	18
View Reports.....	19
SJE Report.....	19
Comprehensive Report	20
Overall Summary PDF	20
Sample Data (ADMIN Only).....	20
Inventory Report	21

Critical Stock Reports.....	21
Low Stock Items.....	21
Near Expiry	21
Manage Users.....	22
Access Manage Users.....	22
Approve / Promote Staff.....	22
Settings.....	23
Color Themes	24
Backup Data	24
Restore Data	24
Profile.....	25
Overview	25
Edit Profile	25
Log Out	26

Introduction

The Hanzai Mobile Sales and Inventory Management System is a web-based platform developed for the benefit of Small Coffee Shops. Developed as an IT Capstone Project by John Mark Vincent Yambot, John Francis Melgarejo, and James Sagcal, this program assists the owner and staff in tracking inventory, managing sales, processing supplier orders, and monitoring profitability. It replaces the traditional notebook-based manual process with a centralized, secure, and accessible digital solution

Accessing the online system

Links to access

System Requirements

Only mobile devices (tablet, phone) can run a modern mobile application. A stable internet connection is required for all functions.

Keeping your Credentials

Your account was created for you by the Admin. Your **Username** is unique and cannot be changed. Please keep your password secure and do not share it

Support and Feedback

Technical support and feedback may be directed to any of the contacts below.

Developer email	yamzvince@gmail.com
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Account Types

There are 3 current account roles in the system.

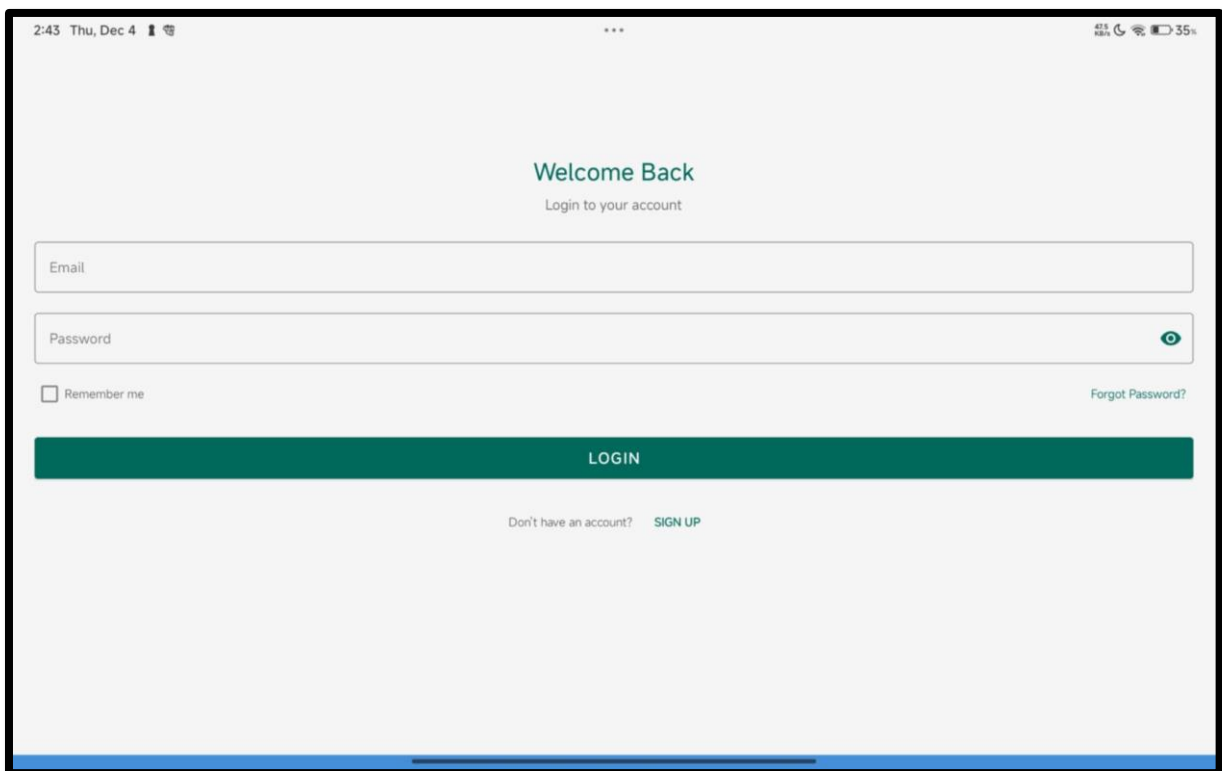
Module / Functionality	Staff	Manager	Admin
View Dashboard	✓	✓	✓
Adjust Dashboard Filters	X	X	✓
Sales			✓
Access POS Module	✓	✓	✓
Process Sales	✓	✓	✓
Manage Customer Returns	X	✓	✓
Manage Customers	✓	✓	✓
View Inventory	✓	✓	✓
Adjust Stock Levels	X	✓	✓
View Suppliers	X	✓	✓
Manage Suppliers (CRUD)	X	✓	✓
Manage Purchase Orders	X	✓	✓
Manage Deliveries	X	✓	✓
Manage Supplier Returns	X	✓	✓
View/Pay Consignment	X	✓	✓
Reports & Logs			✓
View Reports Module	X	✓	✓
Generate Reports	X	✓	✓
View Transactions Log	✓	✓	✓
View Audit Log	X	X	✓
Manage User Accounts	X	X	✓
Manage Permissions	X	X	✓
Manage Data (Categories, etc.)	X	X	✓
Manage System Settings	X	X	✓
Perform Backup/Restore	X	X	✓
✓ - Full access	~ - Only accessible to their own data		X - No access

Login and Passwords




To use the App, you must have an account.

How to Log In

1. Open the Sales and Inventory App.
2. Enter your registered Username and Password.
3. Click "SIGN IN".

A screenshot of a mobile application's login screen. The screen has a light gray background. At the top, there is a status bar with the time '2:43', the date 'Thu, Dec 4', and various system icons. Below the status bar, the text 'Welcome Back' is displayed in a green font, followed by 'Login to your account' in a smaller, gray font. There are two input fields: 'Email' and 'Password'. The 'Password' field has a green eye icon to its right. Below the input fields, there is a checkbox labeled 'Remember me' and a link 'Forgot Password?'. A large green button labeled 'LOGIN' is centered below these elements. At the bottom, there is a link 'Don't have an account? SIGN UP'.

How to Register Account


1:49 Thu, Dec 4    40%


Create Account
Sign up to get started


Full Name

Email

Phone Number

Select Role: Staff 

Password 

Confirm Password 

☒ I Accept [Terms and Conditions](#)

SIGN UP

Already have an account? [LOGIN](#)

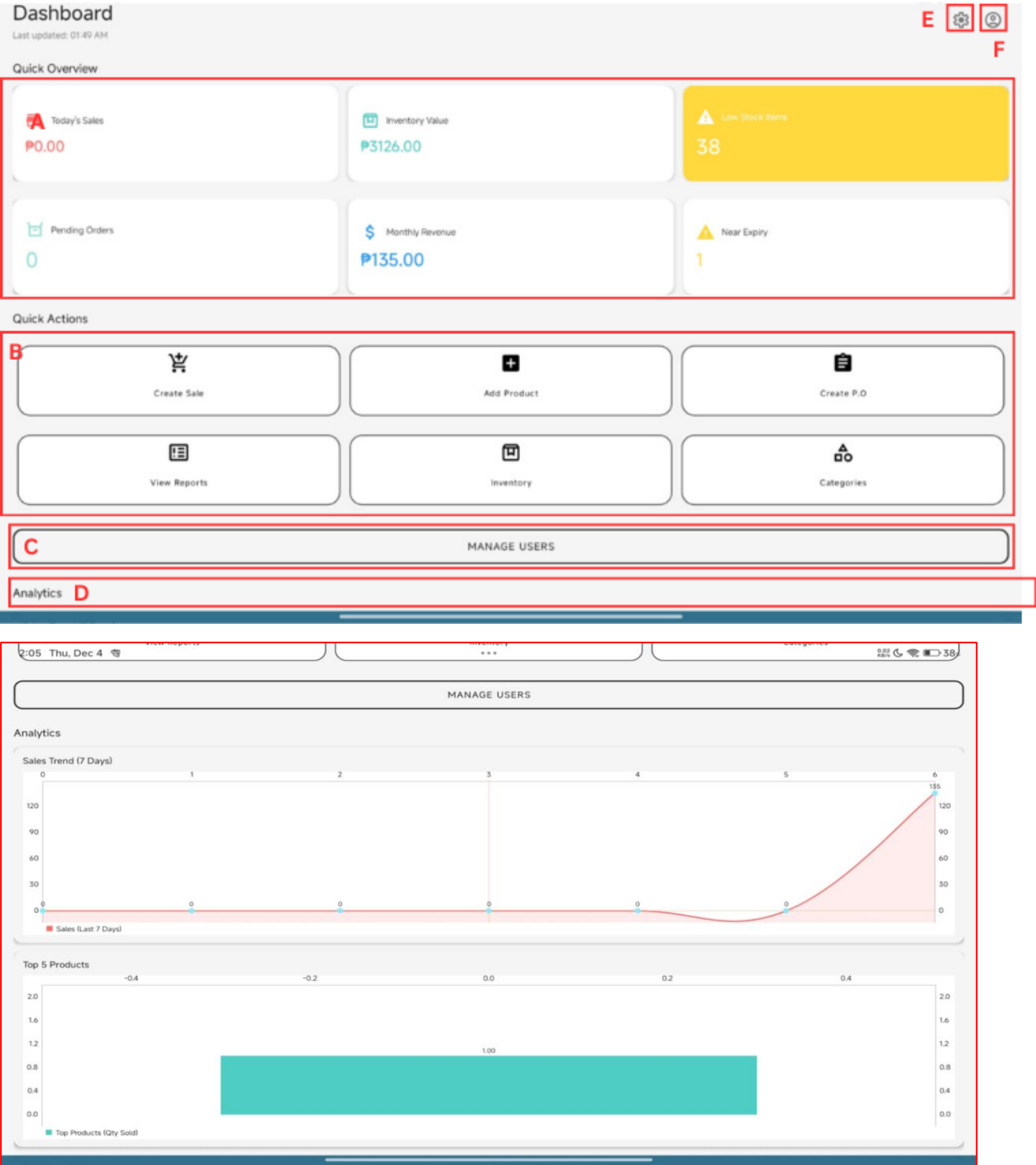
1. Click "SIGN UP" below the Login button.
2. Enter your **first and last name** exactly as you want it to appear on your profile.
3. Provide a **valid email address** that you have access to.
4. Enter your **mobile phone number**, format example: (09221113333).
5. Choose the role that best matches your position or purpose within the platform.
6. Create a secure password following your system's requirements (e.g., minimum length, symbols, etc.).
7. **Show** the password while typing
8. **Hide** it to keep it private
9. Re-enter the **same password** to make sure there are no typos.
10. Click **SIGN UP** to complete your registration.
11. If any fields are missing or incorrect, the system will prompt you to fix them before proceeding.

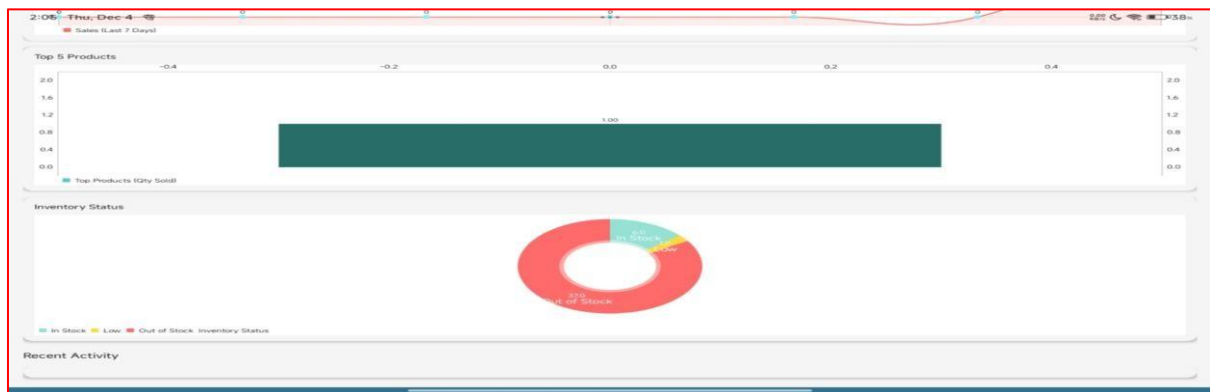
How to Reset a Password

For security reasons, there is no public "Forgot Password" link. If you forget your password, you must contact the Admin. They will manually reset your password, which will generate a new temporary password for you to log in with, just like your first time.

The Dashboard

Anatomy





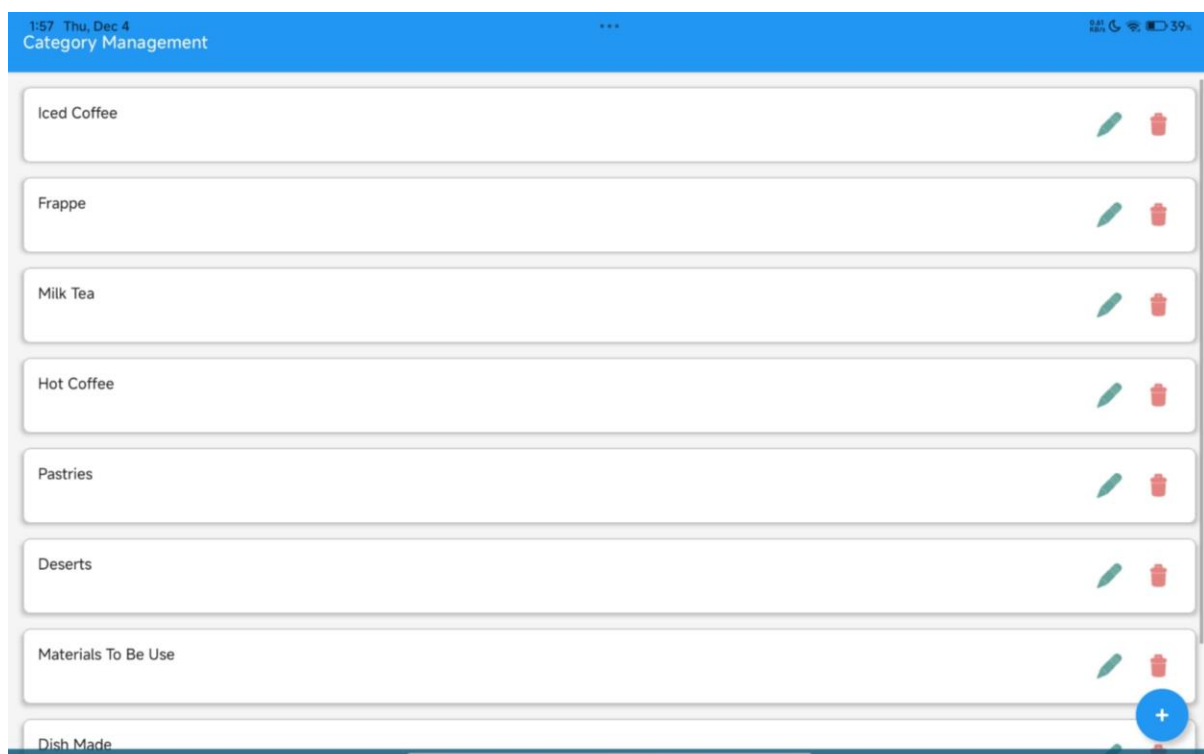
Label	Component	Description
A	Quick Overview	Your main menu for navigating all modules you have permission to see.
B	Quick Actions	Displays six key metrics: Create Sales, Add Product, Create P.O, View Reports, Inventory, Categories.
C	Manage Users	(Super Admin only) Allows you to filter all dashboard data by a time range (Today, Week, Month, All Time), Category, or Supplier ¹³ .
D	Analytics	Includes "Sales Trend", "Top 5 Selling Products" (bar chart), "Slow Moving Products," and "Low Stock Items".
E	Settings	The Settings section allows you to customize the system interface and manage your data safely. This guide covers Color Themes, Backup Data, and Restore Data.
F	Profile	The Profile section allows you to view and update your personal information, manage your account, and log out of the system.

Categories

To use the quick actions like Add Product first you will need categories to group the products together.

How to use Category Management

- Open your system dashboard.
- Navigate to the **Category Management** or **Categories** section.
- This is where you can add, edit, or delete categories.
- Look for the button labeled “+” button to add category.
- Then you will find Category Name, Description (optional), Active.
- Activating the “Active” will work on Add Product. The categories you put will be shown and if not, otherwise it will not show in the category selections.




Add Product

Its main purpose is to allow users to create and manage products in the system so they can be sold, tracked, and reported efficiently.

5:01 Thu, Dec 4

4G LTE 27%

Add New Product



Product Name

Coffee Jelly

Category

Frappe

Product Type

☐ Inventory ☒ Menu

Selling Price

100


Expiry Date (optional, DD/MM/YYYY)

ADD PRODUCT

CANCEL

1:56 Thu, Dec 4
Add New Product

32% 39%



Product Name
White Sugar 1kilo

Category
Materials To Be Use

Product Type
☒ Inventory ☐ Menu

Buying Price
100

Critical Level
2

Initial Quantity
5

Unit (e.g. pcs)
pcs

Selling Price
110

Expiry Date (optional, DD/MM/YYYY)
12/03/2026

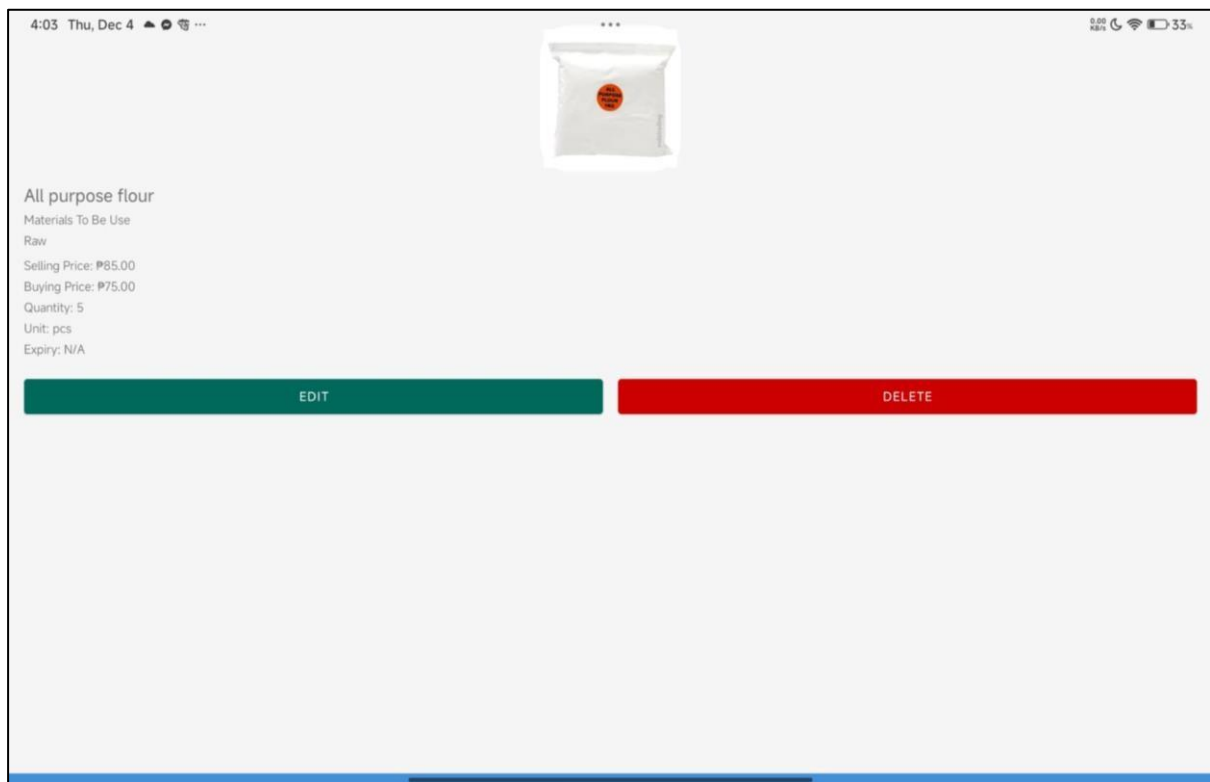
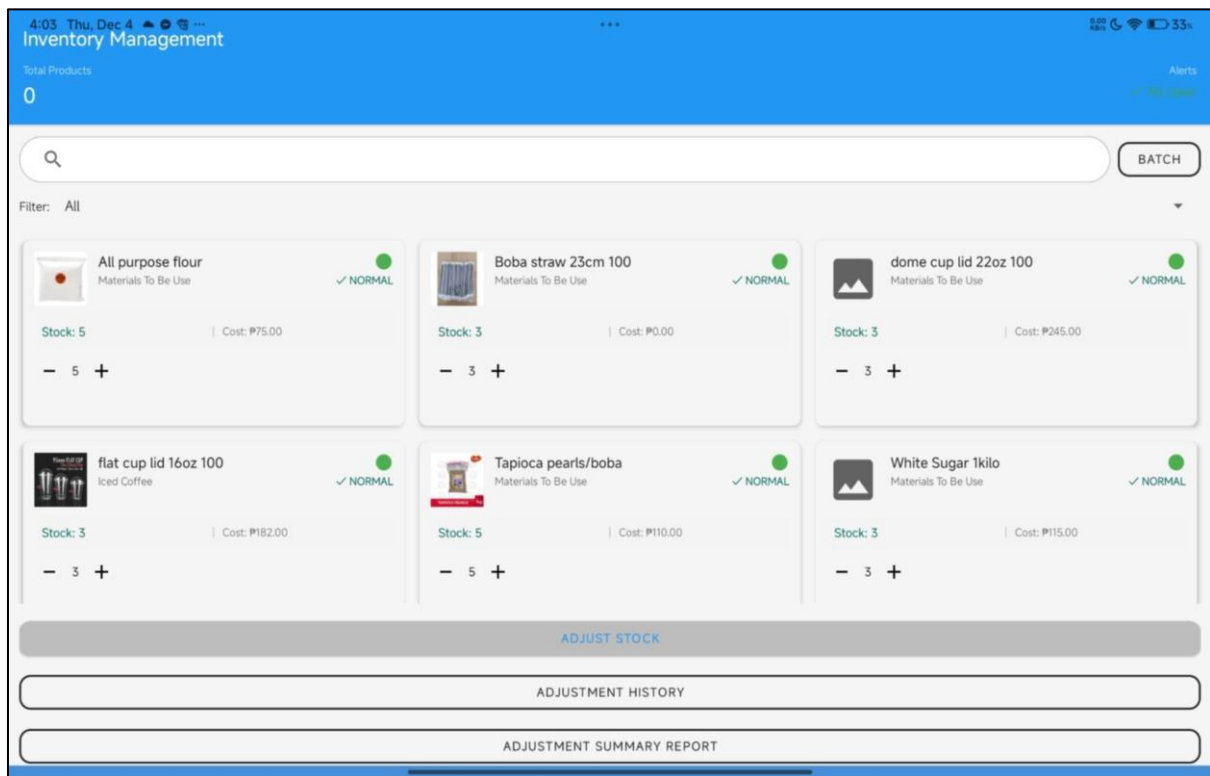
How to Add a New Product

1. From the sidebar, click "Inventory".
2. Click the "Add Product" button.
3. A form will appear. Fill in the required fields:
 - Product Name
 - Product Type
 - Inventory** – used for products you track by stock quantity.
 - Menu** – used for items sold but not stocked as individual units and will be put in to create sales.
 - Buying Price (What you pay for it / for Inventory)
 - Selling Price (What you sell it for / for Both)
 - Initial Quantity (for Inventory)
 - Units (Individual sellable items / for Inventory)
 - Expiry Date (Set Date to notify the owner / for Both)

Inventory

This module is where you view and manage all your products. Admins can add, edit, and adjust stock here.

Anatomy



How to Adjust Stock:

1. Go to **Inventory** → **Adjust Stock**.
2. Select the item you want to modify.

3. Choose the type of adjustment:
 - a. **Increase Stock** – Add quantity to the existing stock.
 - b. **Decrease Stock** – Reduce stock due to damage, loss, or corrections.
4. Enter the **adjustment quantity**.
5. Review the change.
6. Click **Confirm** or **Save Adjustment**.

How to View Adjustment History:

1. Navigate to **Inventory** → **Adjustment History**.
2. Use filters for:
 - a. Item name
 - b. Adjustment type
 - c. Date range
 - d. User
3. Click any entry to view full details.

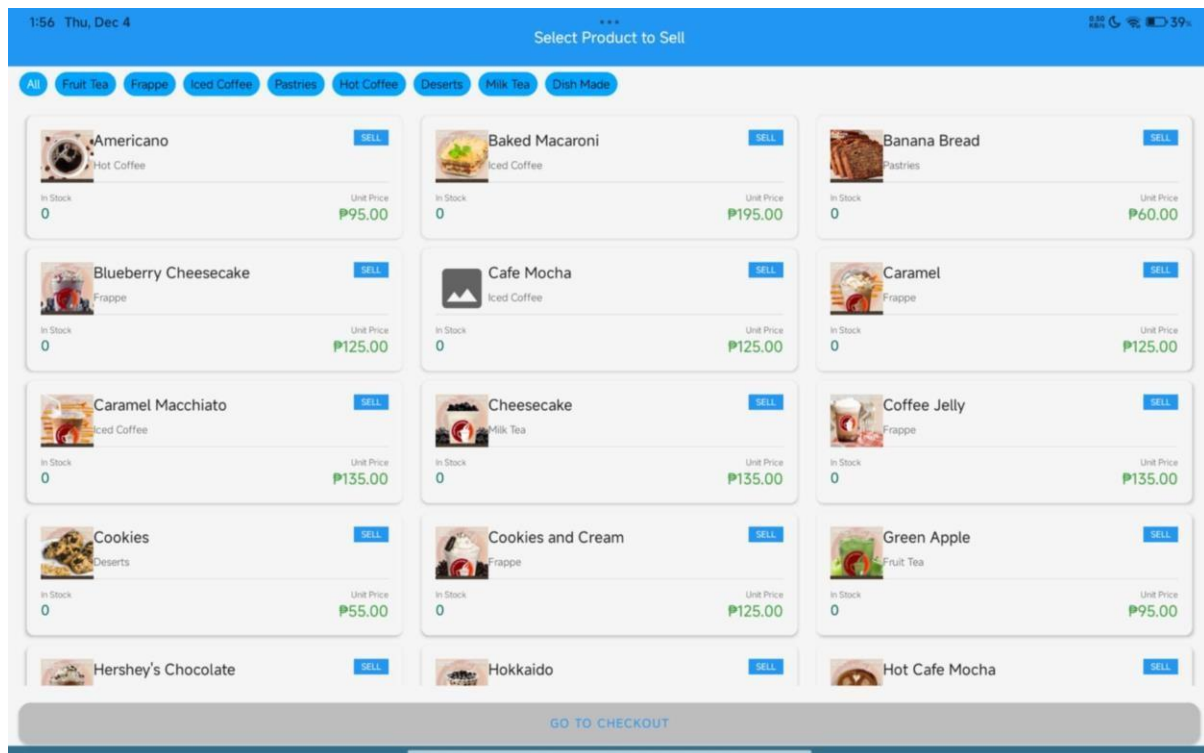
How to Generate the Report:

1. Go to **Reports** → **Adjustment Summary Report**.
2. Select filters:
 - a. Date range (daily, weekly, monthly, custom)
 - b. Specific items or categories
 - c. Adjustment type
 - d. User
3. Click **Generate Report**.
4. Optionally export as:
 - a. PDF
 - b. Excel
 - c. CSV

Create Sales

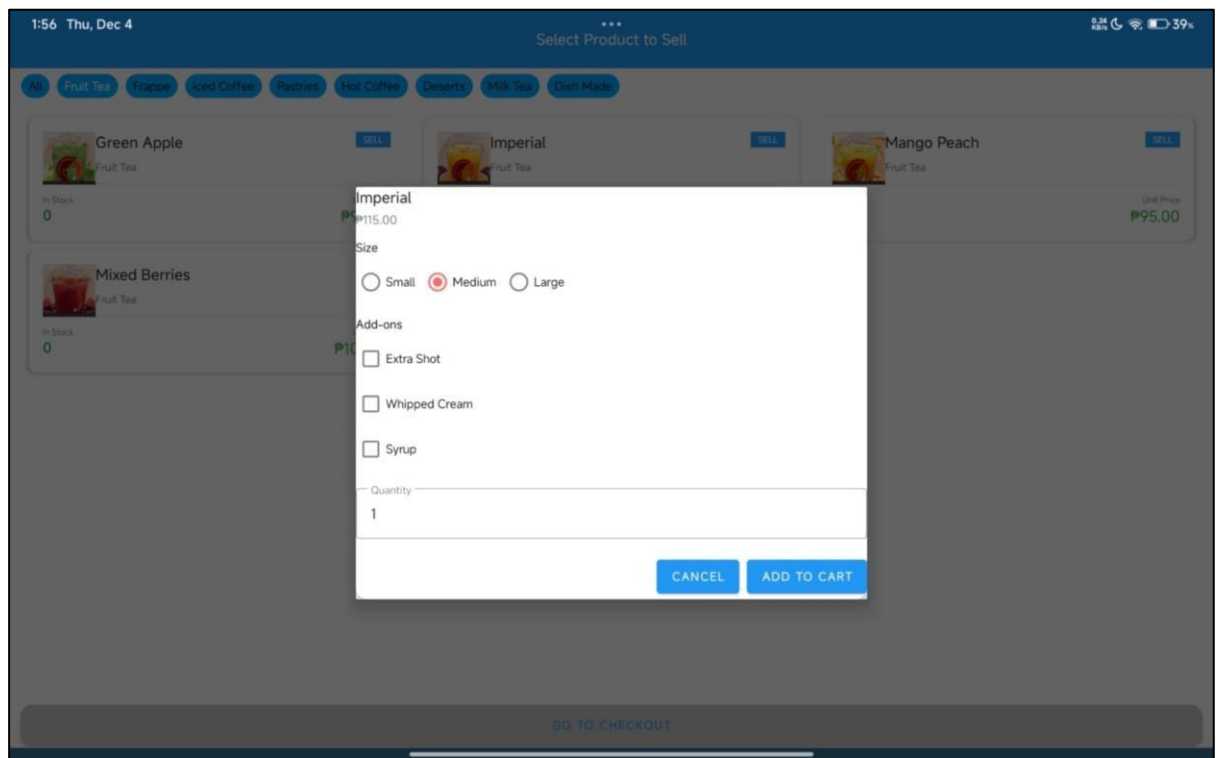
This is the primary screen for processing customer transactions.

Anatomy



How to use Product to Sell

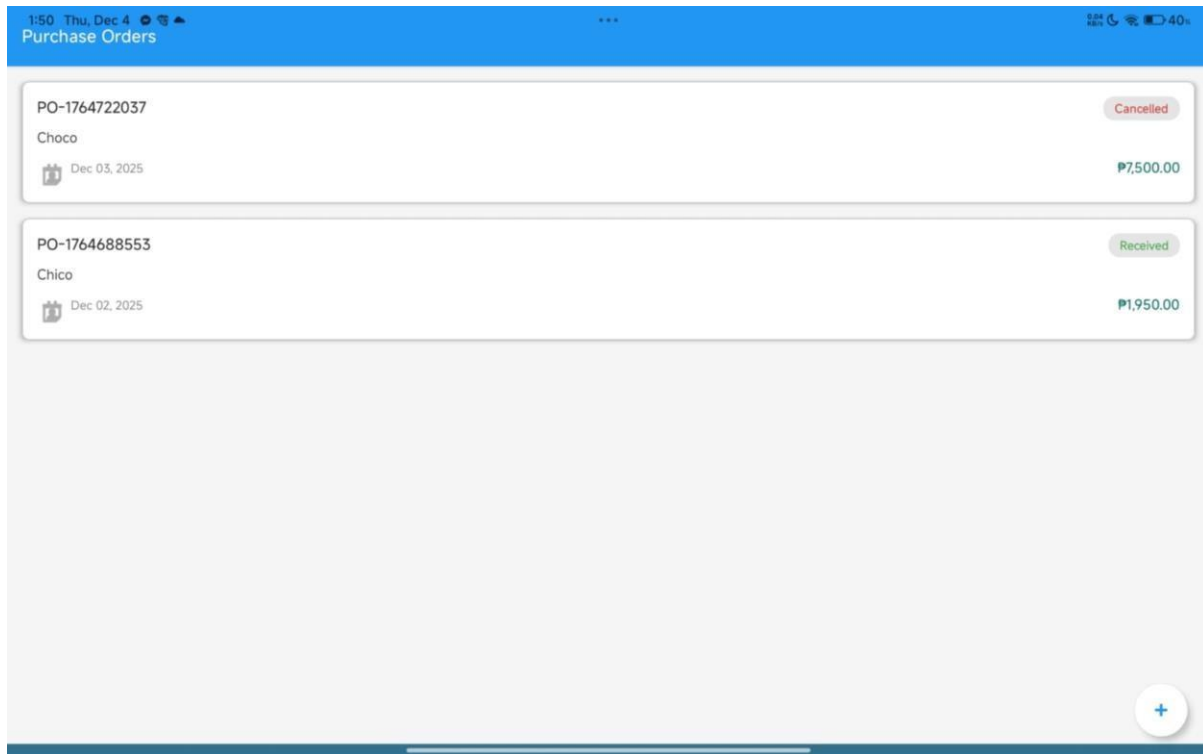
1. First **Click the product** you want to buy.
2. Second, select the **size option** (e.g., Small, Medium, Large), if the product has sizes.
3. Third, In the same pop-up window, choose any **add-ons** the customer wants.
4. Add-ons are optional—you can skip this step if not needed.
5. After selecting size and add-ons, click **"Add to Cart."**
6. The item will appear in the cart with all selected options.
7. Open the **cart** or click the **Checkout** button.
8. Review the order before completing the sale.



How to use POS Transaction

1. Once selected, the item will appear in the **cart / order list** on the POS screen.
2. Enter the **quantity (QTY)** the customer wants to buy.
3. Put the discount type and it will automatically adjust the total pay.
4. Payment Method:
 - Select **Cash**.
 - The system will show the total amount due.
 - Select **E-Payment** (then a capture receipt will pop up there you will put a photocopy of the receipt).
5. Order Type where the order is coming from:
 - **Walk-in** – customer is physically in the store
 - **Delivery** – customer orders remotely (may require address & contact details)
6. Click "Edit Cart" if you want to add more products.
7. When ready, click the **"COMPLETE SALE"** button.

Create Purchase Orders



How to Create a Purchase Order

1. Click "+" to create a purchase order.
2. Enter the **Supplier Name** from whom you are ordering the products.
3. **Order Date:** Enter the date the order is being placed (usually today).
4. **Expected Date:** Enter the date you expect to receive the products.
5. Use the **Notes** field to include any special instructions for the supplier.
6. **Examples:**
 - "Deliver before 10 AM"
 - "Pack fragile items carefully"
 - "Include expiry dates for perishable items"
7. Click **"Add Item"** then select the product from your inventory or catalog.
8. Enter the following details for each item:
 - **Quantity:** Number of units you are ordering
 - **Unit Price:** Price per unit of the product
9. Click **"CREATE PURCHASE ORDER"** the PO will now be recorded in the system and ready for processing.
10. Then after creating go to your Purchase Order, then that product that you put will mark as pending. Then it's up to you if the product is either marked as received or you cancel the order.

5:41 Thu, Dec 4

Purchase Order Details

PO Number
PO-1764798071

Supplier
Ddy

Date
Dec 04, 2025

Total Amount
₱375.00

Status
Pending

MARK AS RECEIVED

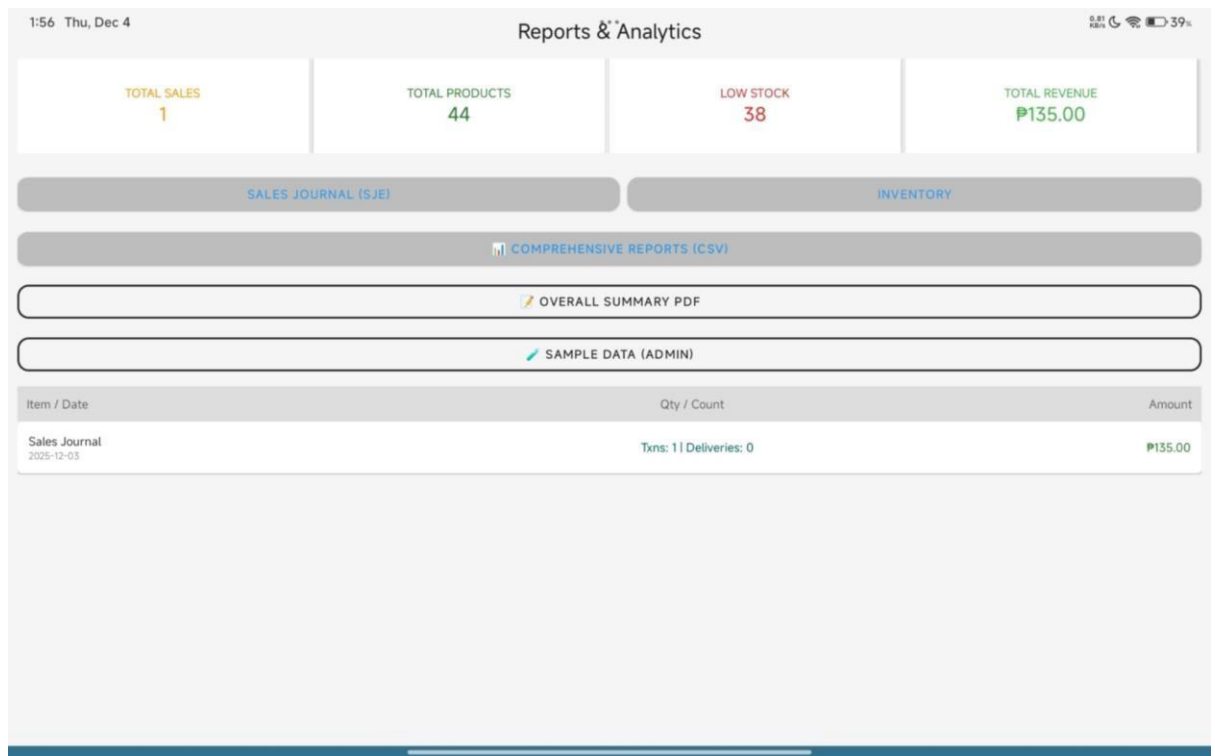
CANCEL ORDER

View Reports

Reports help you track sales, inventory, and overall business performance. This guide explains how to access and view different types of reports, including generating PDFs and using sample data.

SJE Report

- **Purpose:** Shows detailed sales transactions.
- Click **SJE** to view sales by date, product, or customer.



Comprehensive Report

- **Purpose:** Combines multiple data points (sales, inventory, expenses) into one report.
- Click **Comprehensive Report** to view a full summary.
- Can include:
 - Total sales
 - Stock updates
 - Supplier orders
 - Discounts and promotions
- **Export to Excel/CSV** – for further analysis

Overall Summary PDF

- **Purpose:** Provides a quick summary of business performance in PDF format.
- Click **Overall Summary**.
- Choose the **date range** and **filters** if available.
- Click **Export PDF** or **Generate PDF** to save or print the report.

Sample Data (ADMIN Only)

- **Sample Data** to test reports or preview layouts.

Inventory Report

- **Purpose:** Tracks stock levels, incoming and outgoing inventory.
- Click **Inventory** to see:
 - Current stock
 - Expired items
 - Items low on stock

6:11 Thu, Dec 4

Reports & Analytics

8:04 AM

21%

TOTAL SALES

1

TOTAL PRODUCTS

44

LOW STOCK

38

TOTAL REVENUE

P135.00

SALES JOURNAL (SJE)

INVENTORY

COMPREHENSIVE REPORTS (CSV)

OVERALL SUMMARY PDF

SAMPLE DATA (ADMIN)

Item / Date	Qty / Count	Amount
All purpose flour 2025-12-03	Stock: 5	P425.00
Americano 2025-12-03	Stock: 0	P0.00
Baked Macaroni 2025-12-03	Stock: 0	P0.00
Banana Bread 2025-12-03	Stock: 0	P0.00
Blueberry Cheesecake 2025-12-03	Stock: 0	P0.00
Boba straw 23cm 100 2025-12-03	Stock: 3	P3.00

Critical Stock Reports

Low Stock Items

1. **Purpose:** Identify products that are running low and need to be reordered.
 2. **Steps:**
 - Click on **Low Stock Items**.
 - The system will display products below the minimum stock level.
 - Review the list and plan for replenishment.
- Example:**
- Flour – 5 KG (minimum stock: 10 KG)
 - Chocolate Donuts – 10 PC (minimum stock: 20 PC)

Near Expiry

1. **Purpose:** Identify products that are approaching their expiration date to prevent waste.
2. **Steps:**
 - Click **Near Expiry Items**.
 - The system will display products that will expire soon.
 - Act such as:
 - Selling them quickly (promotions or discounts)
 - Using them in preparation if ingredients
 - Returning or discarding if necessary

Manage Users

The Manage Users function allows administrators to add, edit, or remove user accounts and control their access permissions in the system. This ensures proper account management and security.

Access Manage Users

- Log in as **ADMIN** or a user with management privileges.
- Navigate to the **Settings** or **User Management** menu.
- Click **Manage Users** to view the list of all users.

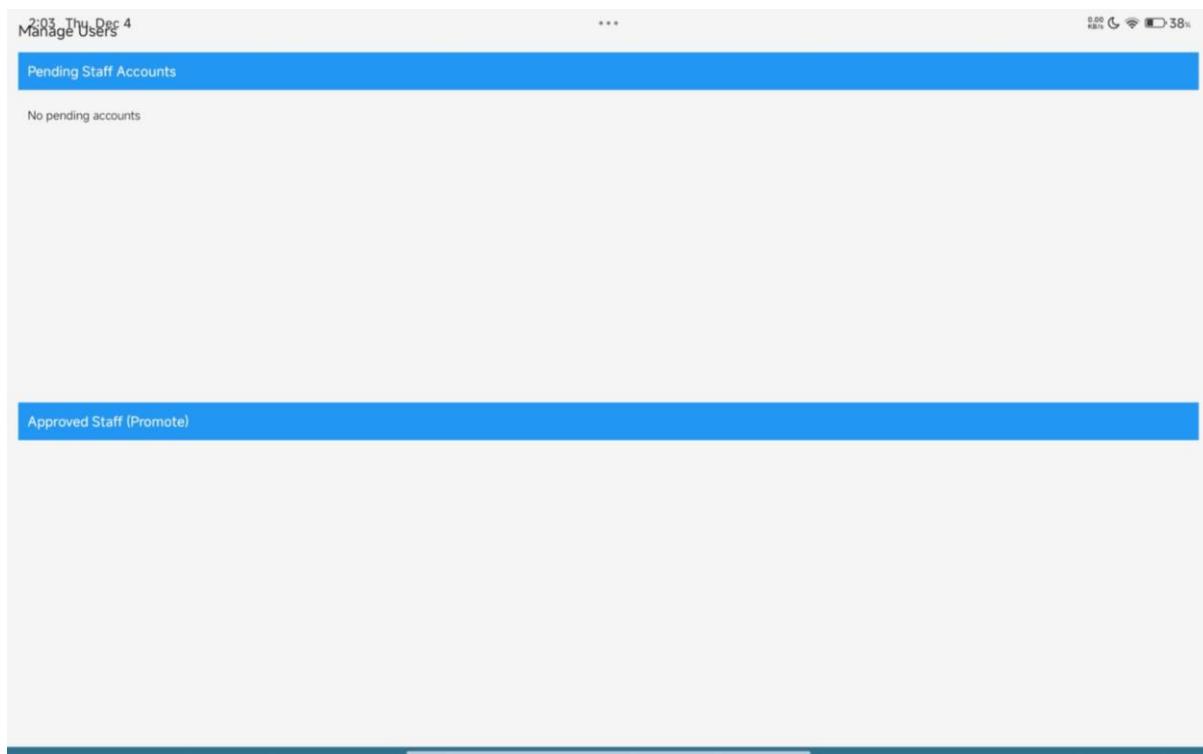
Pending Staff Accounts

- **Purpose:** Review and approve staff accounts that are awaiting activation.
- **Steps:**
 - Click **Pending Staff** or **Pending Accounts**.
 - Review the account details submitted by the staff:
 - Full Name
 - Email Address
 - Phone Number
 - Requested Role (if provided)
 - **Approve** the account to activate it or **reject** if the request is invalid.
 - Once approved, the account moves to the active users list, and the staff can log in.

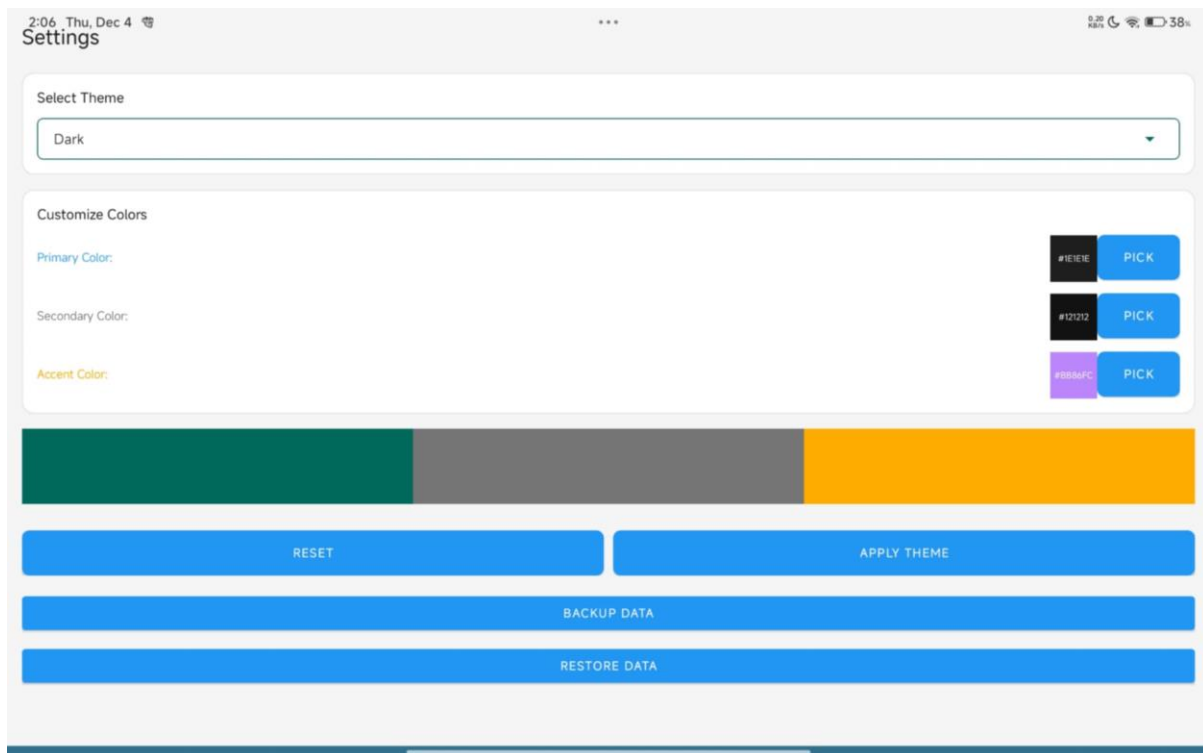
Approve / Promote Staff

- **Purpose:** Assign or upgrade staff roles after approval.
- **Steps:**

- Go to the **Active Users** list.
- Find the staff members you want to promote.
- Click **Edit** or **Promote**.
- Change the **Role / Access Level**:
 - Example roles:
 - Cashier / Staff → Supervisor → Admin
 - Click **Save** to apply for changes.
- The staff members now have updated permissions according to their new role.



Settings



Color Themes

1. **Purpose:** Customize the appearance of your system interface.
2. **Steps:**
 - Click on **Select Themes**.
 - Choose a theme from the available options (e.g., Light, Dark, or Custom colors).
 - The system interface will update automatically with your selected theme.

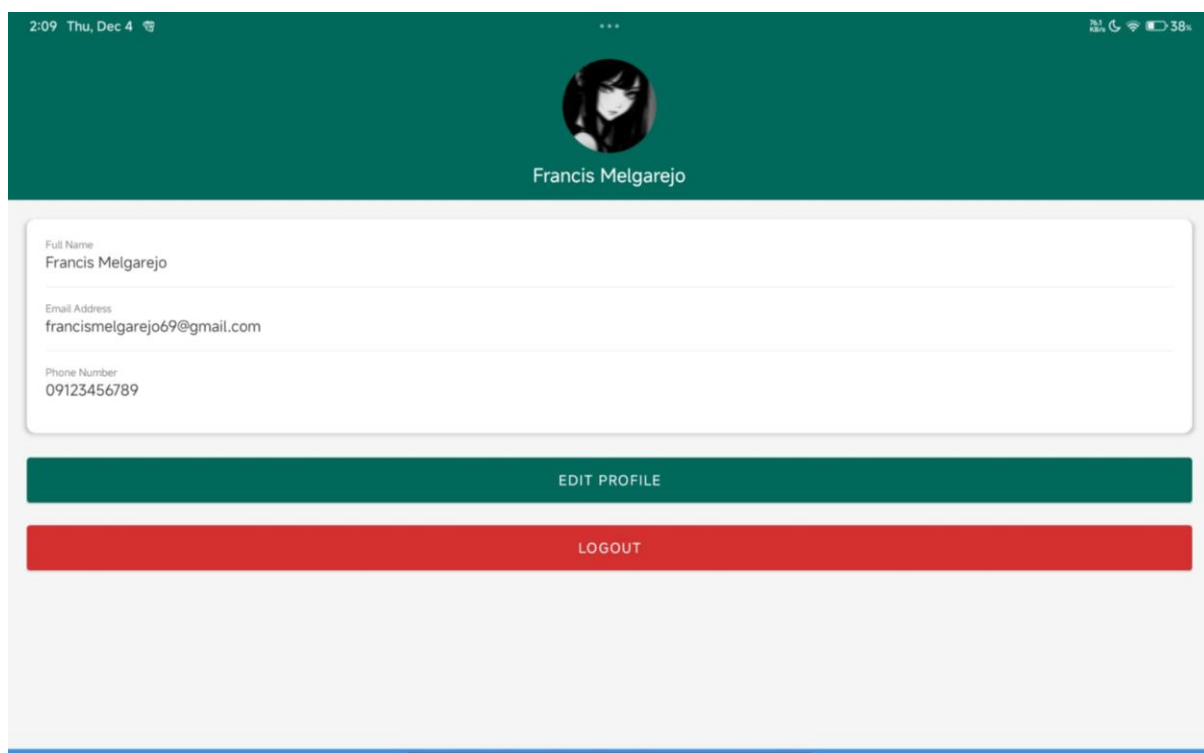
Backup Data

- **Purpose:** Create a safe copy of your system data to prevent data loss.
- **Steps:**
 - Click **Backup Data**.
 - Select the type of data you want to back up (if applicable).
 - Click Create Backup or Start Backup.
 - Save the backup file to a secure location (computer, external drive, or cloud).

Restore Data

- **Purpose:** Recover previously backed-up data to restore the system to a previous state.
- **Warning:** Restoring data may overwrite current data. Always backup your latest data before restoring.
- **Steps:**
 - Click **Restore Data**.
 - Select the backup file you want to restore.
 - Confirm the restore action when prompted.
 - The system will replace current data with backup data.

Profile



A mobile application profile screen mockup. The top header is dark green with a status bar at the top showing '2:09 Thu, Dec 4' and battery level '38%'. Below the header is a circular profile picture of a woman with dark hair, and the name 'Francis Melgarejo' is displayed below it. The main content area is white and contains three input fields: 'Full Name' with the value 'Francis Melgarejo', 'Email Address' with the value 'francismelgarejo69@gmail.com', and 'Phone Number' with the value '09123456789'. Below the input fields are two buttons: a green 'EDIT PROFILE' button and a red 'LOGOUT' button. The bottom of the screen has a blue home indicator bar.

2:09 Thu, Dec 4

Francis Melgarejo

Full Name
Francis Melgarejo

Email Address
francismelgarejo69@gmail.com

Phone Number
09123456789

EDIT PROFILE

LOGOUT

Overview

1. Display your personal image in the system.
2. Show your registered name in the system.
3. Display your registered email.
4. Display your contact number.

Edit Profile

1. **Purpose:** Update personal information such as Full Name, Email, Phone Number, and Profile Image.
2. **Steps:**
 - Click **Edit Profile**.
 - Make necessary changes.
 - Click **Save** to update your information.

Log Out

1. **Purpose:** Safely exit your account to prevent unauthorized access.
2. **Steps:**
 - Click **Log Out**.
 - You will be returned to the login screen.