

SALES AND INVENTORY MANAGEMENT APPLICATION

USER
MANUAL

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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

Account Types

There are 3 current account roles in the system.

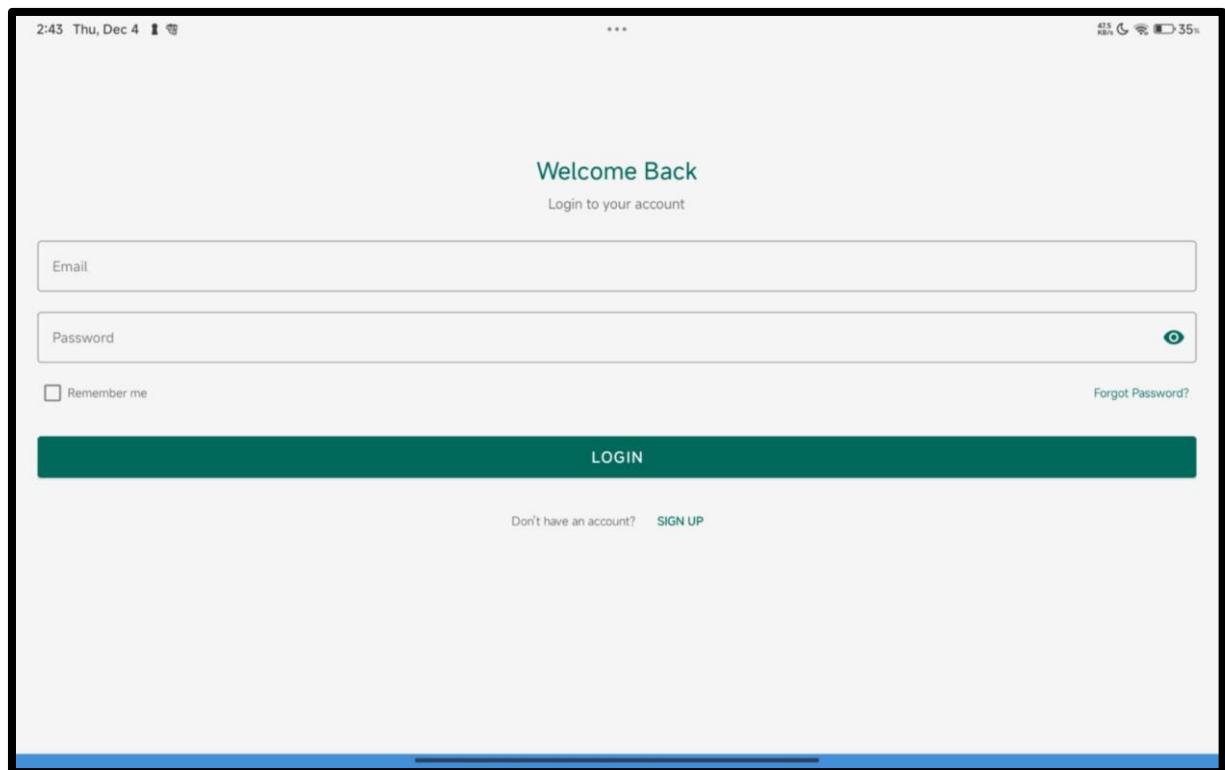
Module / Functionality	Staff	Manager	Admin
View Dashboard	✓	✓	✓
Adjust Dashboard Filters	X	X	✓
Sales			✓
Access POS Module	✓	✓	✓
Process Sales	✓	✓	✓
Manage Customer Returns	X	✓	✓
Manage Customers	✓	✓	✓
View Inventory	✓	✓	✓
Adjust Stock Levels	X	✓	✓
View Suppliers	X	✓	✓
Manage Suppliers (CRUD)	X	✓	✓
Manage 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".



How to Register Account

The screenshot shows a mobile application interface for account creation. At the top, there are status icons for battery level (40%), signal strength, and connectivity. Below these, the title "Create Account" is centered above a sub-instruction "Sign up to get started". The form consists of several input fields: "Full Name", "Email", and "Phone Number", each with a placeholder text inside. Below these is a dropdown menu labeled "Select Role: Staff". Underneath the role selection are two password fields, "Password" and "Confirm Password", each accompanied by a visibility toggle icon (a small eye symbol). A checkbox labeled "I Accept: Terms and Conditions" is positioned below the password fields. At the bottom of the form is a large green "SIGN UP" button. Above the "SIGN UP" button, there is a link "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

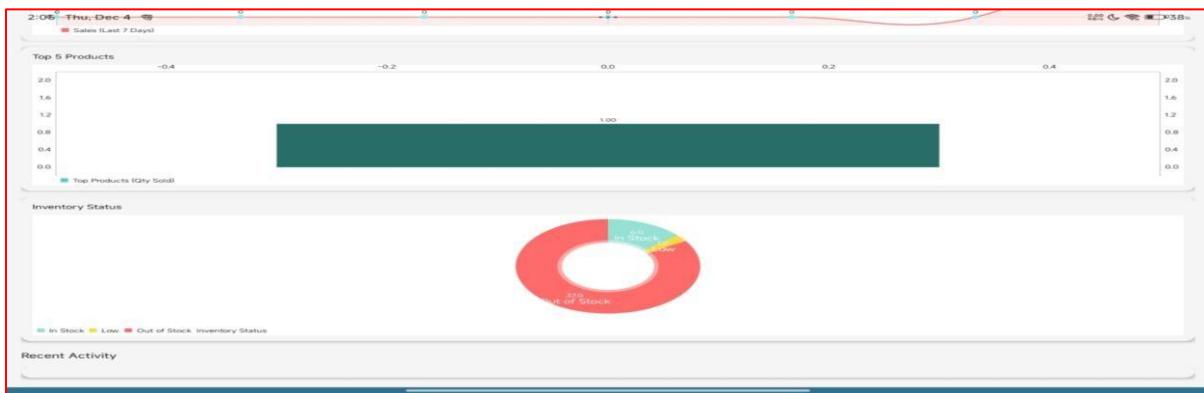
For security reasons, there is no public "Forgot Password" link. If you forget your password, you must contact the Admin. They will manually reset your password, which will generate a new temporary password for you to log in with, just like your first time.

The Dashboard

Anatomy

The dashboard is organized into several main sections:

- Dashboard Header:** Shows "Last updated: 01:49 AM". On the right are icons for **E** (Logout), **F** (Settings), and **G** (User Profile).
- Quick Overview:** A grid of four cards:
 - A:** Today's Sales (₱0.00)
 - B:** Inventory Value (₱3126.00)
 - C:** Low Stock Items (38)
 - D:** Pending Orders (0)
 - E:** Monthly Revenue (₱135.00)
 - F:** Near Expiry (1)
- Quick Actions:** A row of six buttons:
 - B:** Create Sale
 - C:** Add Product
 - D:** Create P.O.
 - E:** View Reports
 - F:** Inventory
 - G:** Categories
- Manage Users:** A section labeled **C** containing a button for **MANAGE USERS**.
- Analytics:** A section labeled **D** containing a sub-section for **Analytics**.
 - Sales Trend (7 Days):** A line chart showing sales over 7 days. The Y-axis ranges from 0 to 120. The X-axis shows days 0 to 6. The chart shows values of 0, 0, 0, 0, 0, 0, and 135 respectively.
 - Top 5 Products:** A bar chart showing the quantity sold for top products. The Y-axis ranges from 0.0 to 2.0. The X-axis shows values -0.4, -0.2, 0.0, 0.2, and 0.4. The chart shows a single bar at 1.00.



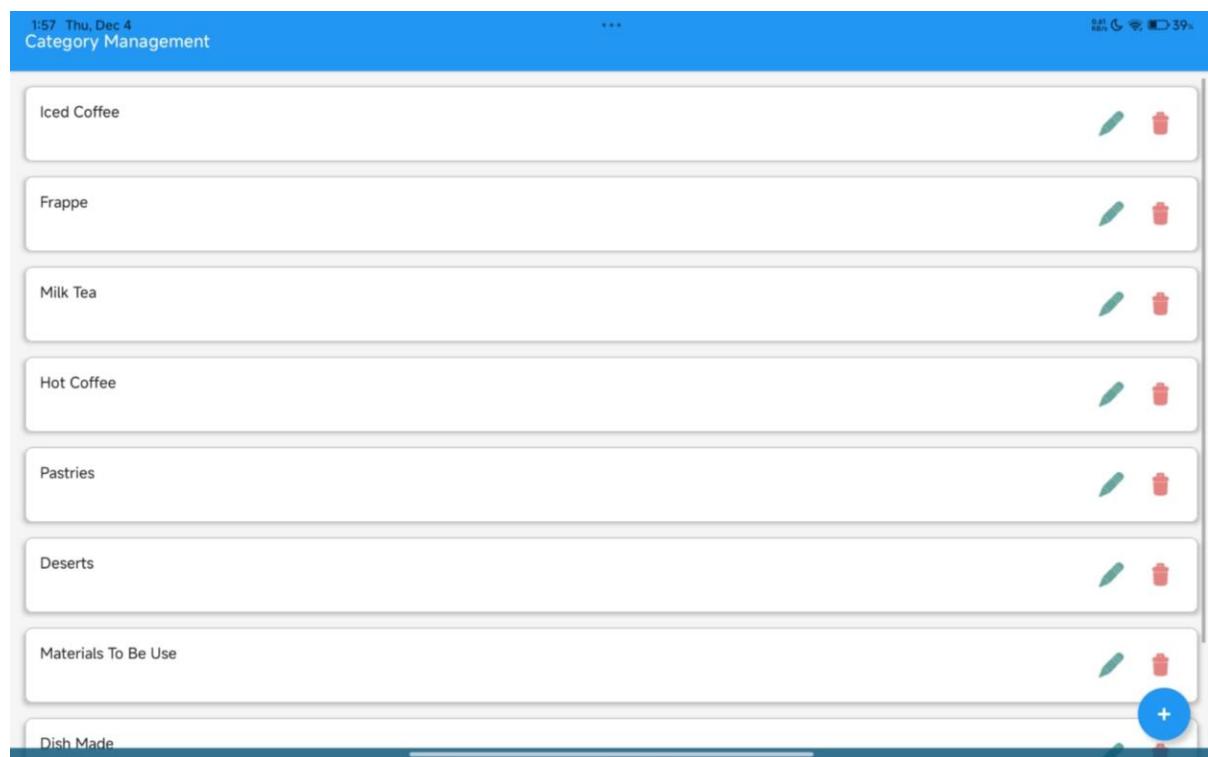
Label	Component	Description
A	Quick Overview	Your main menu for navigating all modules you have permission to see.
B	Quick Actions	Displays six key metrics: Create Sales, Add Product, Create P.O, View Reports, Inventory, Categories.
C	Manage Users	(Super Admin only) Allows you to filter all dashboard 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 ⚡ ⓘ ⓘ ... Add New Product 27%

Product Name: Coffee Jelly

Category: Frappe

Product Type: Inventory Menu

Selling Price: 100

Expiry Date (optional, DD/MM/YYYY):

ADD PRODUCT CANCEL

Product Name: White Sugar 1kilo

Category: Materials To Be Used

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:

- o Product Name
- o 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.

- o Buying Price (What you pay for it / for Inventory)
- o Selling Price (What you sell it for / for Both)
- o Initial Quantity (for Inventory)
- o Units (Individual sellable items / for Inventory)
- o 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

Product Details		Stock & Cost		Actions	
 All purpose flour	Materials To Be Use	 NORMAL	Stock: 5 Cost: ₦75.00	- 5 +	
 Boba straw 23cm 100	Materials To Be Use	 NORMAL	Stock: 3 Cost: ₦0.00	- 3 +	
 dome cup lid 22oz 100	Materials To Be Use	 NORMAL	Stock: 3 Cost: ₦245.00	- 3 +	
 flat cup lid 16oz 100 Iced Coffee	Materials To Be Use	 NORMAL	Stock: 3 Cost: ₦182.00	- 3 +	
 Tapioca pearls/boba	Materials To Be Use	 NORMAL	Stock: 5 Cost: ₦10.00	- 5 +	
 White Sugar 1kilo	Materials To Be Use	 NORMAL	Stock: 3 Cost: ₦15.00	- 3 +	

4:03 Thu, Dec 4

All purpose flour

Materials To Be Use
Raw
Selling Price: ₱85.00
Buying Price: ₱75.00
Quantity: 5
Unit: pcs
Expiry: N/A

EDIT DELETE

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

1:56 Thu, Dec 4

Select Product to Sell

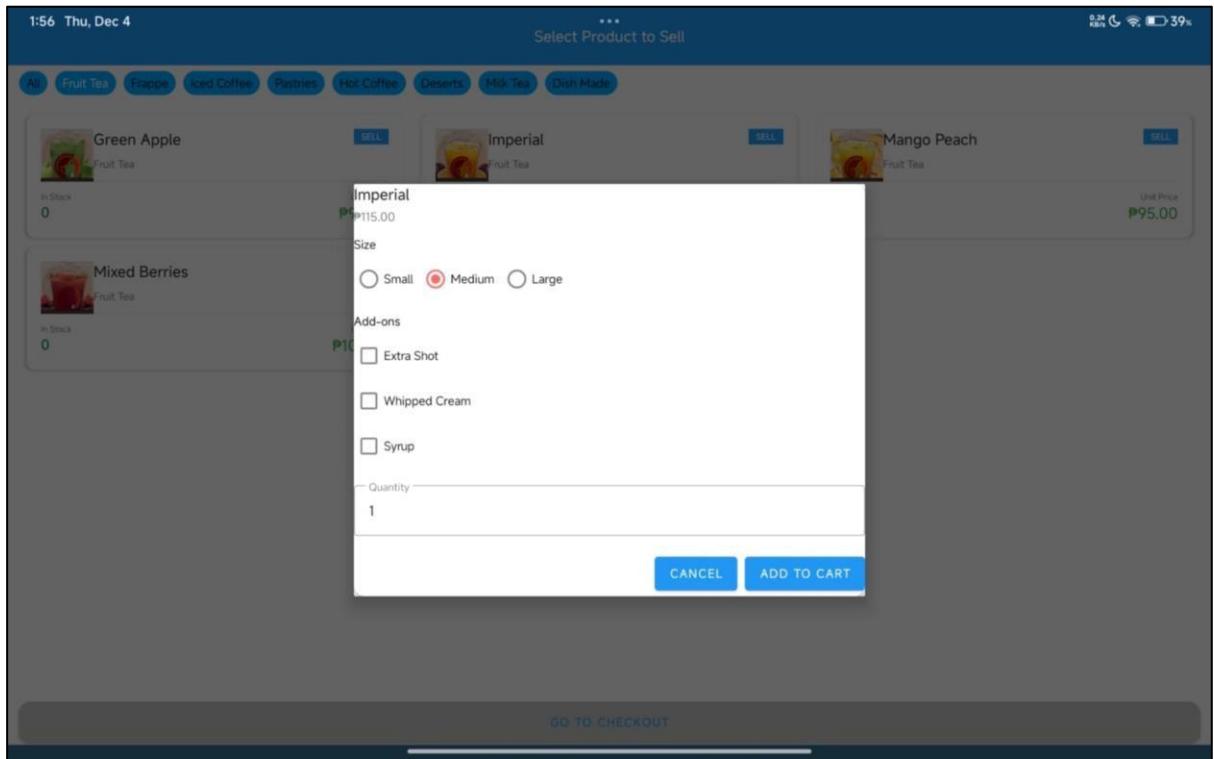
All Fruit Tea Frappe Iced Coffee Pastries Hot Coffee Deserts Milk Tea Dish Made

Americano Hot Coffee In Stock 0 Unit Price ₱95.00	Baked Macaroni Iced Coffee In Stock 0 Unit Price ₱195.00	Banana Bread Pastries In Stock 0 Unit Price ₱60.00
Blueberry Cheesecake Frappe In Stock 0 Unit Price ₱125.00	Cafe Mocha Iced Coffee In Stock 0 Unit Price ₱125.00	Caramel Frappe In Stock 0 Unit Price ₱125.00
Caramel Macchiato Iced Coffee In Stock 0 Unit Price ₱135.00	Cheesecake Milk Tea In Stock 0 Unit Price ₱135.00	Coffee Jelly Frappe In Stock 0 Unit Price ₱135.00
Cookies Deserts In Stock 0 Unit Price ₱55.00	Cookies and Cream Frappe In Stock 0 Unit Price ₱125.00	Green Apple Fruit Tea In Stock 0 Unit Price ₱95.00
Hershey's Chocolate In Stock 0	Hokkaido In Stock 0	Hot Cafe Mocha Fruit Tea In Stock 0 Unit Price ₱95.00

GO TO CHECKOUT

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.

The image displays two side-by-side screenshots of a POS Transaction interface, likely from a mobile device, showing the process of creating a purchase order.

Top Screenshot (Payment Method: Cash):

- Header:** POS Transaction, Date: Thu, Dec 4, Time: 1:58, Battery: 39%.
- Selected Item:** Baked Macaroni (Medium) - Medium, Quantity: 1, Price: ₦195.00.
- Quantity to Sell:** 1
- Discount (%):** 10
- TOTAL TO PAY:** ₦175.50
- Payment Method:** Cash
- Order Type:** Walk-in Delivery
- Cash:** Cash given: 200, Change: ₦24.50.
- Buttons:** EDIT CART, CONFIRM SALE.

Bottom Screenshot (Payment Method: E-Payment):

- Header:** POS Transaction, Date: Thu, Dec 4, Time: 1:59, Battery: 39%.
- Selected Item:** Baked Macaroni (Medium) - Medium, Quantity: 1, Price: ₦195.00.
- Quantity to Sell:** 1
- Discount (%):** 10
- TOTAL TO PAY:** ₦175.50
- Payment Method:** E-Payment
- Order Type:** Walk-in Delivery
- E-Payment:** Capture the customer's payment receipt, then confirm the sale.
- Buttons:** CAPTURE RECEIPT, EDIT CART, CONFIRM SALE.

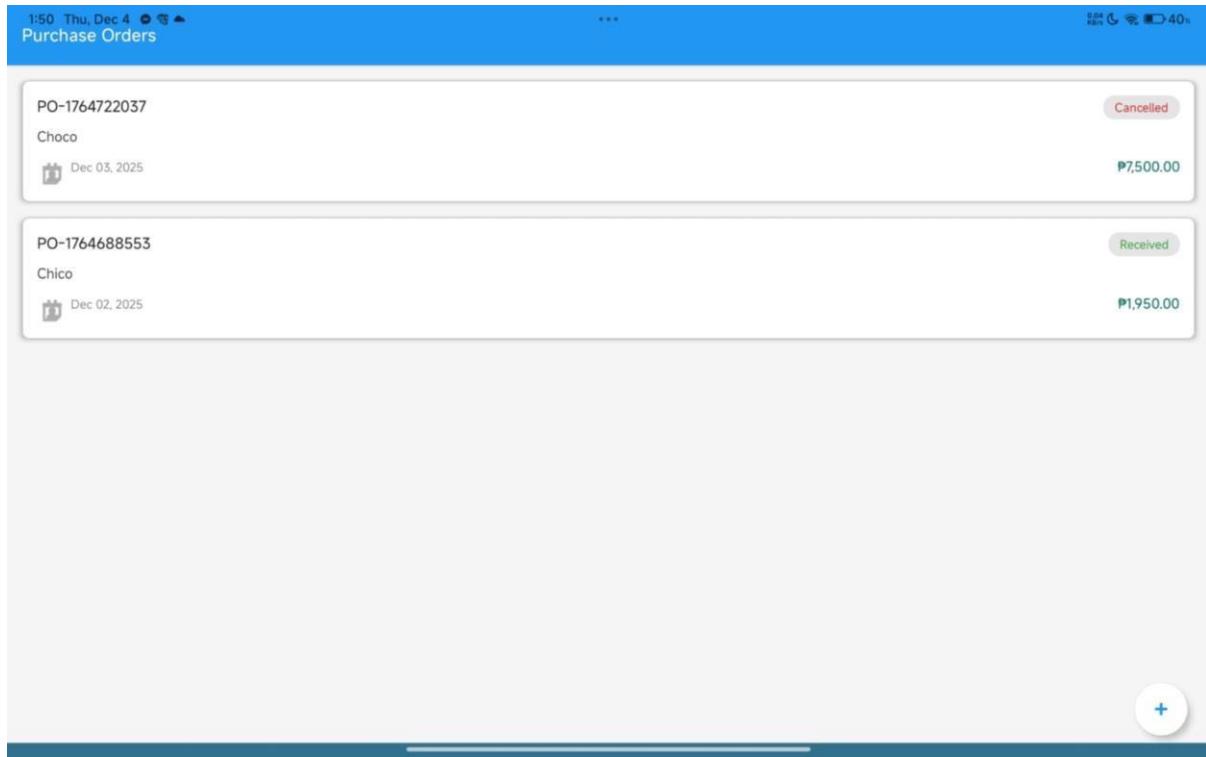
Create Purchase Orders

This section covers all modules related to suppliers: Purchase Orders, Deliveries, and Consignment Payouts.

Purchase Orders

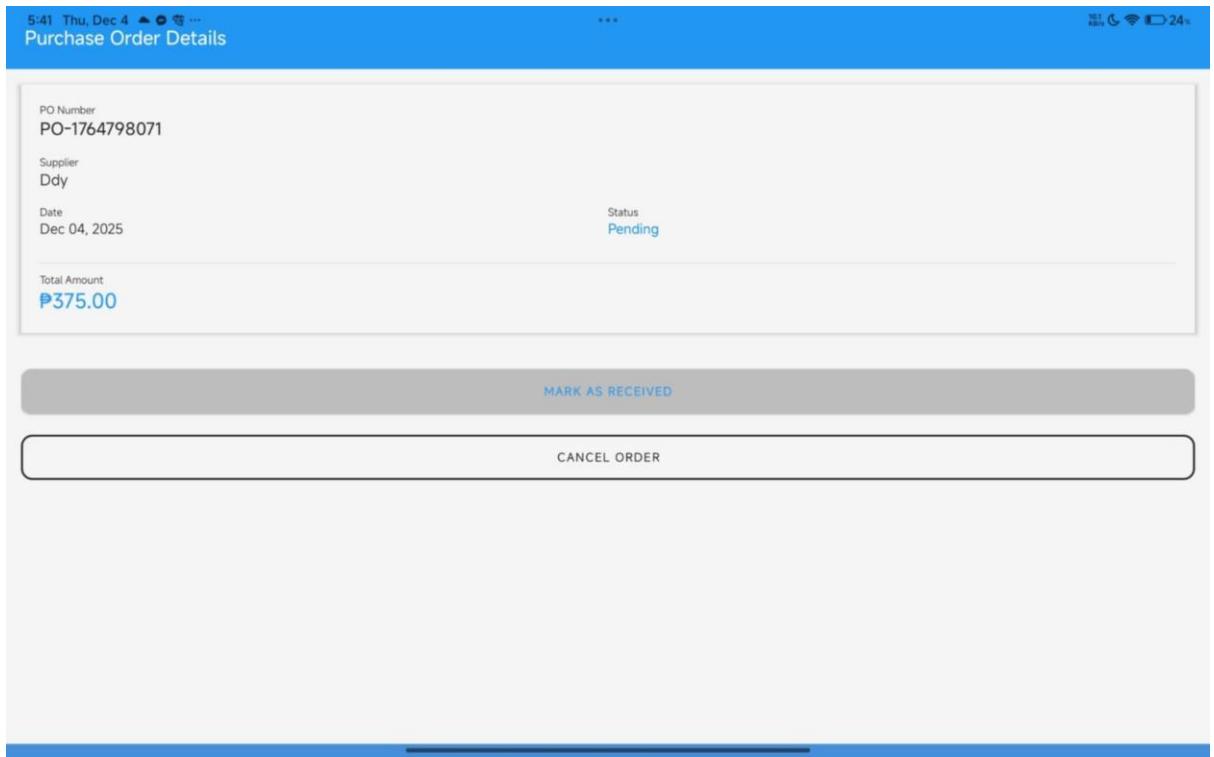
This module lets you create, track, and receive orders from your suppliers.

Anatomy



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.

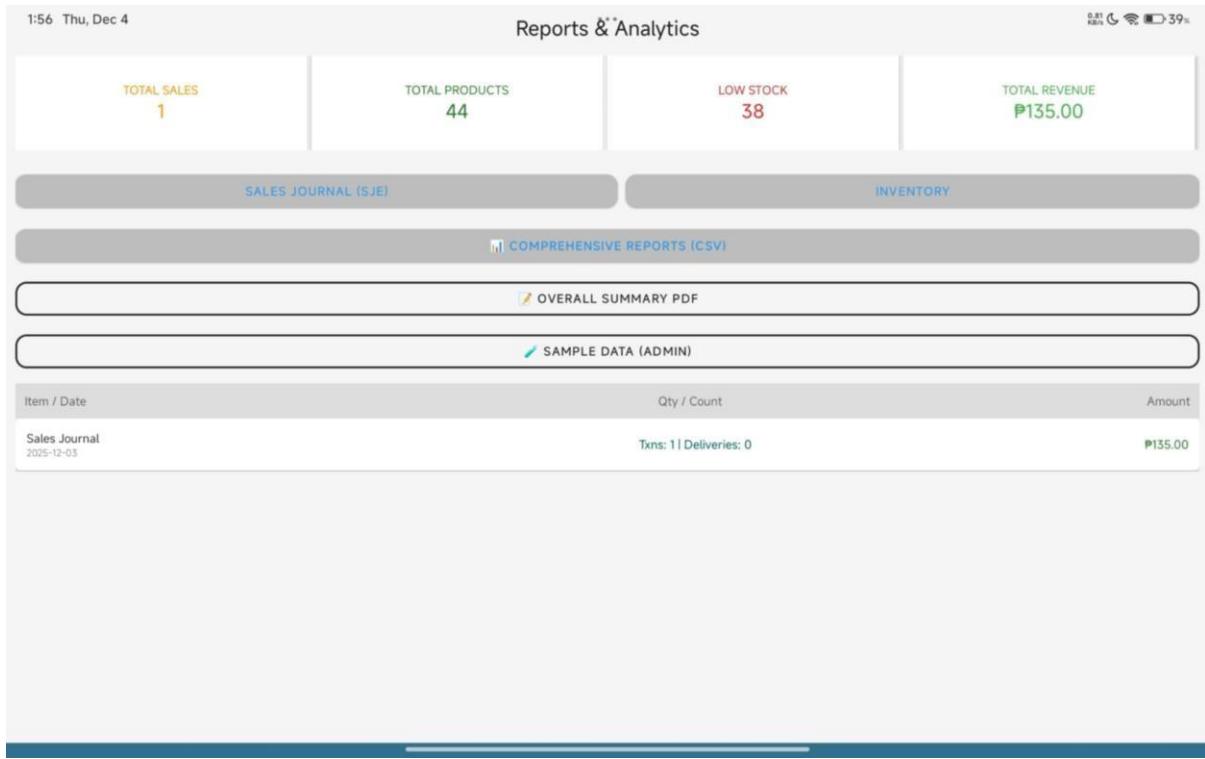


View Reports

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

Item / Date	Qty / Count	Amount
All purpose flour 2025-12-03	Stock: 5	₱425.00
Americano 2025-12-03	Stock: 0	₱0.00
Baked Macaroni 2025-12-03	Stock: 0	₱0.00
Banana Bread 2025-12-03	Stock: 0	₱0.00
Blueberry Cheesecake 2025-12-03	Stock: 0	₱0.00
Boba straw 23cm 100 2025-12-03	Stock: 3	₱3.00

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.

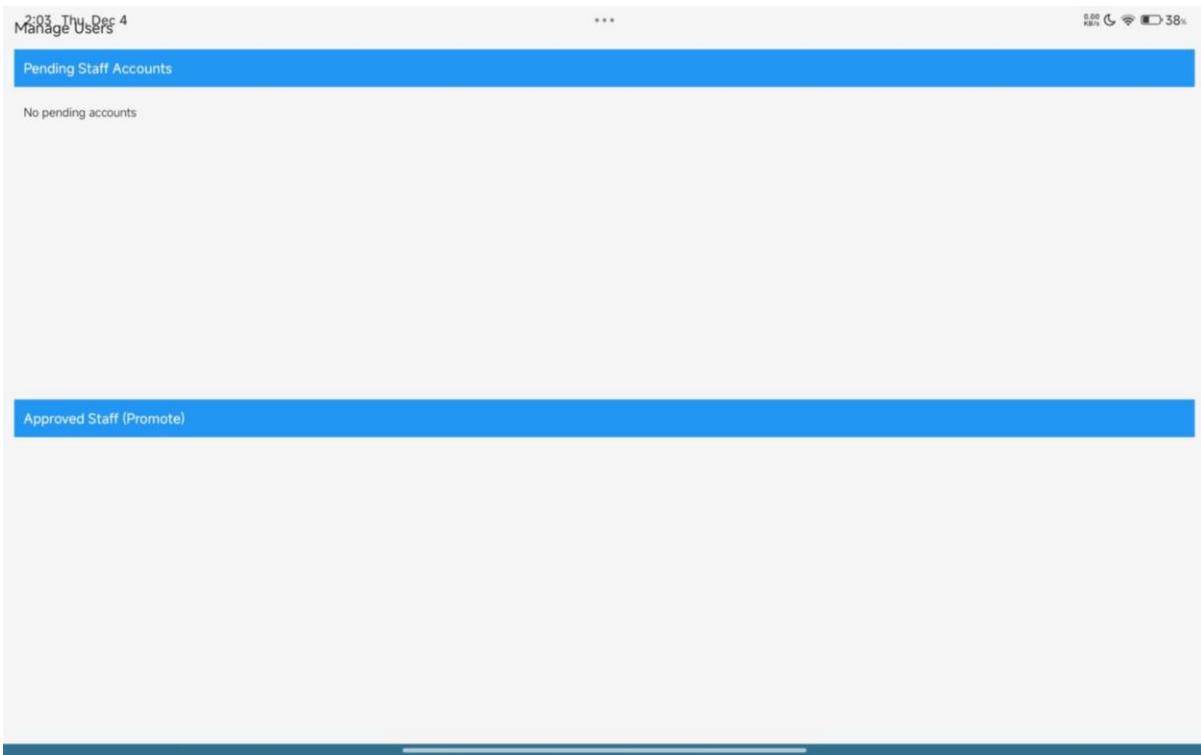
Pending Staff Accounts

- **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.

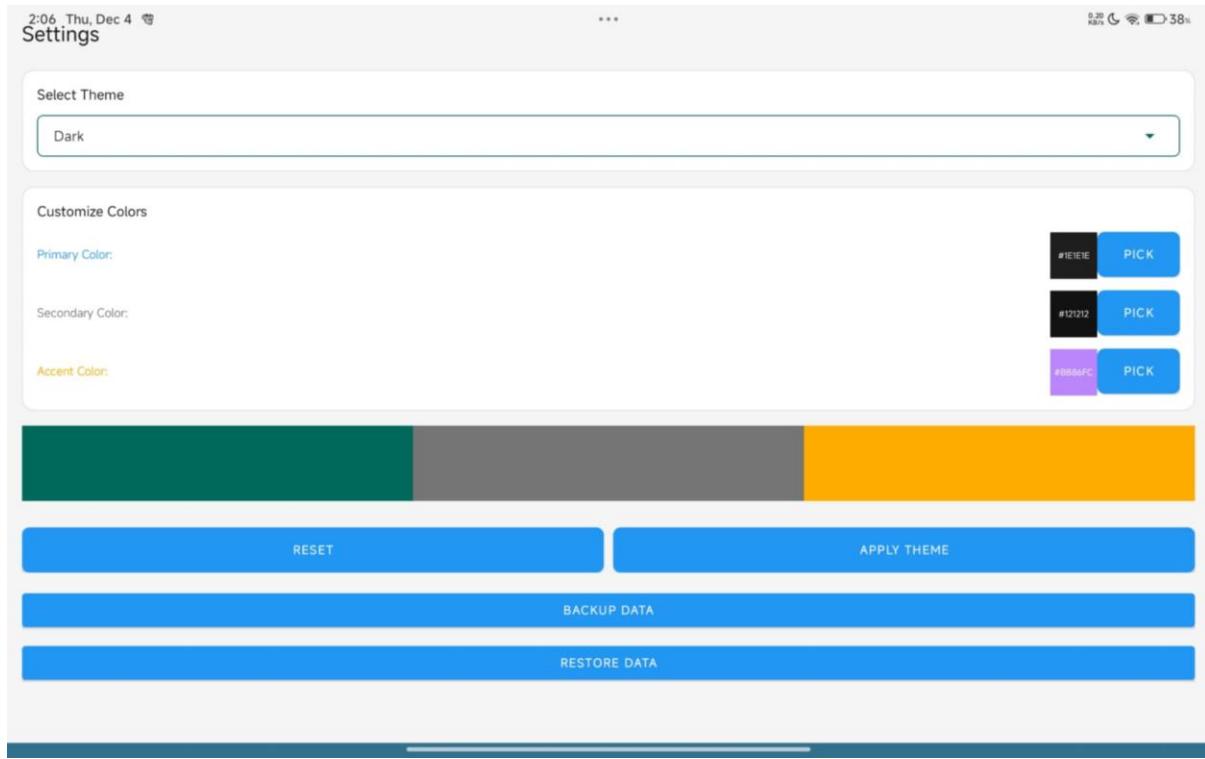
Approve / Promote Staff

- **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.

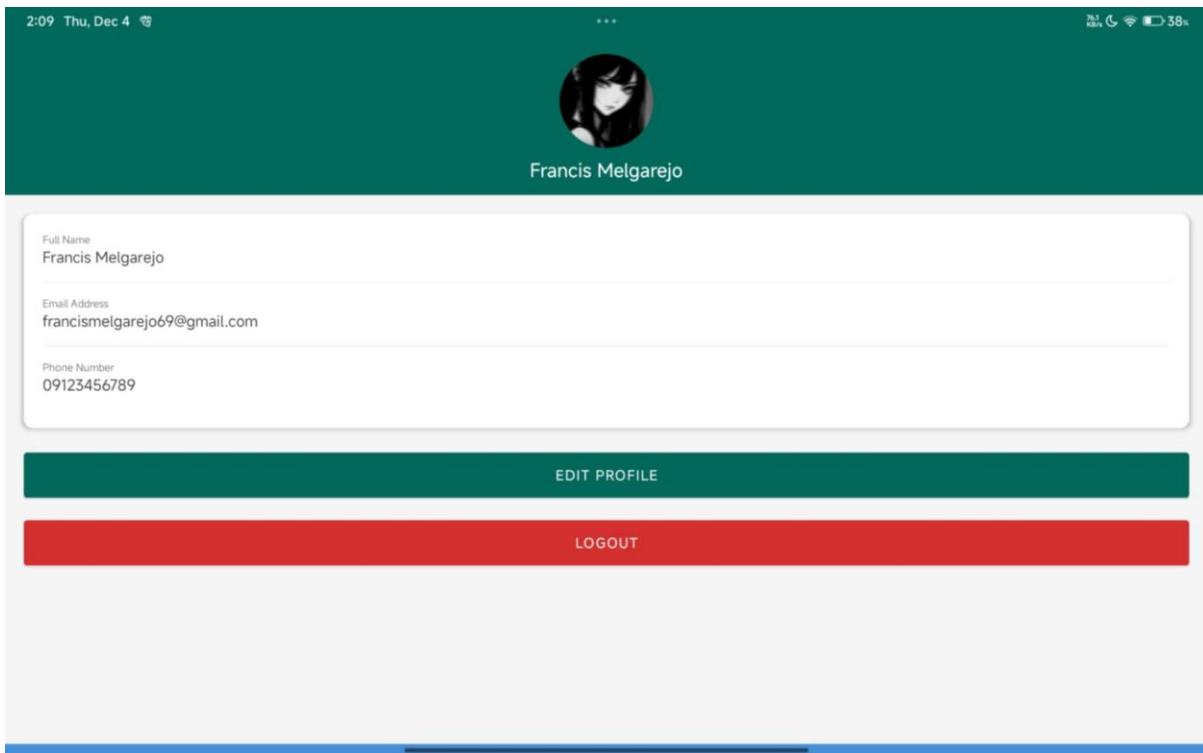
Backup Data

- **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



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.