USER MANUAL

Retail Efficiency Optimization: An Integrated POS and Online Ordering System with Thermal Printing for Streamlined Hardware Store Operations

I. INTRODUCTION

This user's guide was carefully prepared by **John Anthon G. Dela Cruz** to ensure that all users of the Retail Efficiency Optimization System—an Integrated POS and Online Ordering System with Thermal Printing—are well-informed about its operations.

The guide is designed to assist users, regardless of their technical experience, in navigating and utilizing the system efficiently. By taking the time to read through this manual, users can fully understand the system's features and capabilities, empowering them to maximize its potential for streamlined operations.

The **Retail Efficiency Optimization System—an Integrated POS and Online Ordering System with Thermal Printing** has been created to facilitate smooth and efficient hardware store management. It simplifies in-store customer transactions, enhances order processing, and ensures effective management of products and inventory.

Accessible both online and in-store, the system is user-friendly and comprehensive, catering to the needs of modern customers. Its purpose is to improve transaction processes, streamline inventory management, and boost operational efficiency, ultimately supporting the growth and success of hardware businesses.

II. Getting Started

Accessing the Website

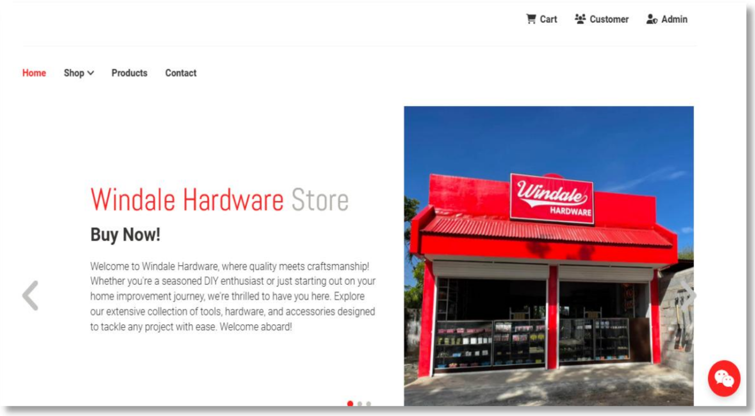
Follow these steps to access the system: Open a web browser on your computer, tablet, or smartphone (e.g., Google Chrome, Mozilla Firefox, Safari).

In the address bar, type the URL: https://windalehardware.com and press Enter.

Wait for the homepage of the system to load. Ensure your device is connected to the internet to access the website smoothly.

Exploring the Homepage

Upon successfully accessing https://windalehardware.com, you'll encounter a well-organized homepage designed to facilitate easy navigation and efficient access to various features. Here's an overview of its key components:



Header Section:

- **Logo** : Located at the top-left corner, representing Windale Hardware and serving as a quick link back to the homepage from any page.

Navigation Menu : Situated at the top-right, providing links to essential sections:

- **Home**: Returns you to the homepage.
- **Shop**: Offers a dropdown menu with categories such as:
    - Hand Held Tools
    - Paint
    - Sealants
    - Electrical Supplies
    - Office Supplies
    - Construction Materials
- **Products**: Displays a comprehensive list of all available products.
- **Contact**: Provides contact information and a form for inquiries.
- **User Access Links** : Located adjacent to the navigation menu:
    - **Cart**: View items added for purchase.
    - **Customer**: Access customer-related features.
    - **Admin**: For administrative access (restricted to authorized personnel).

Main Banner:

- Features a welcoming message: "Welcome to Windale Hardware, where quality meets craftsmanship!"
- Encourages exploration of the extensive collection of tools, hardware, and accessories.

Featured Items Section:

- Showcases select products with images, prices, available quantities, and an "Add to cart" option.
- Examples include:
  - **Pioneer Marine Epoxy**: ₱242, Quantity: 250
  - **Boysen White Permacoat**: ₱189, Quantity: 250
  - **Claw Hammer**: ₱215, Quantity: 250

Key Features Section:

- Highlights the store's commitments:
  - **Wide Range of Products**: A diverse collection of tools, hardware, and accessories.
  - **Quality and Durability**: High-quality products ensuring longevity.
  - **Expert Customer Support**: Knowledgeable staff ready to assist all customers.

About Us Section:

- Provides a brief introduction to Windale Hardware, emphasizing years of experience and dedication to both professionals and DIY enthusiasts.’

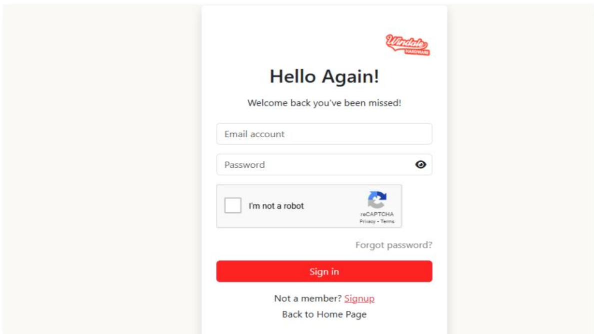
Footer Section:

- Includes:
    - **Chat Support**: "Chat with us" feature for real-time assistance.
    - **Login/Sign Up**: Options for account access and creation.
    - **© Windale Hardware Inc. All rights reserved**: Indicating copyright information.

By familiarizing yourself with these elements, you can navigate the Windale Hardware website effectively, enhancing your shopping experience and ensuring efficient use of the Retail Efficiency Optimization System.

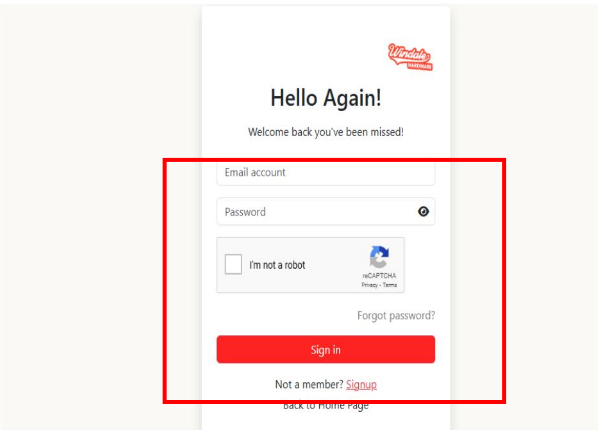
III. Customer Login Page

To access the system as a customer, you'll begin by logging into your account using the **Customer Login Page**.

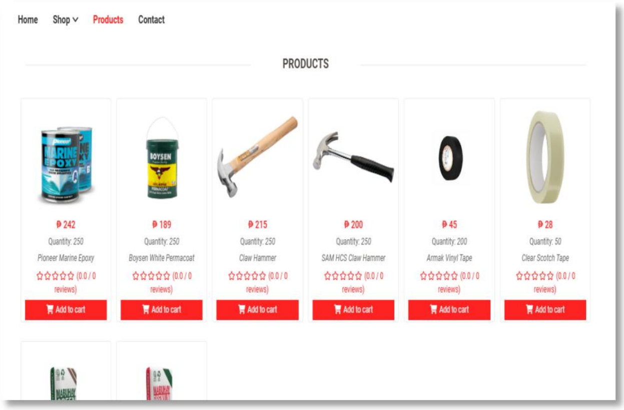


Steps to Log In

To log in, locate the **Email** field on the login page and type the email address associated with your account. Ensure there are no typos to avoid login errors. Next, find the **Password** field directly below and carefully enter your password. Remember, passwords are case-sensitive After entering your credentials, check the **"I'm not a robot"** box to complete the CAPTCHA verification. This ensures you're a real user and not a bot. Once your credentials and CAPTCHA are entered, click the **Login** button to proceed.

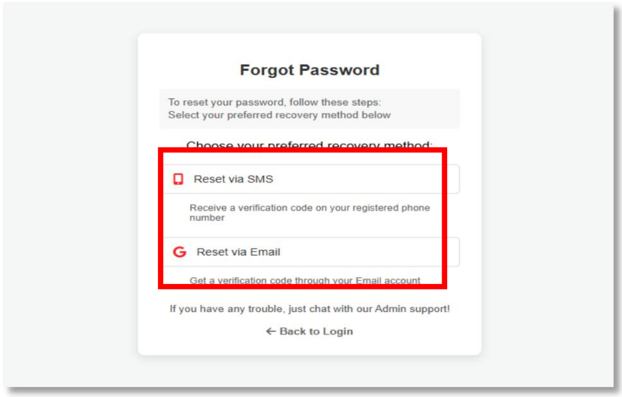


A Visual Reference of the Product Page



- If your credentials are correct, you will be redirected to the **Products Page**, where you can browse and order items.

If you forget your password, click the **"Forgot Password"** link on the login page and follow the instructions to reset it.

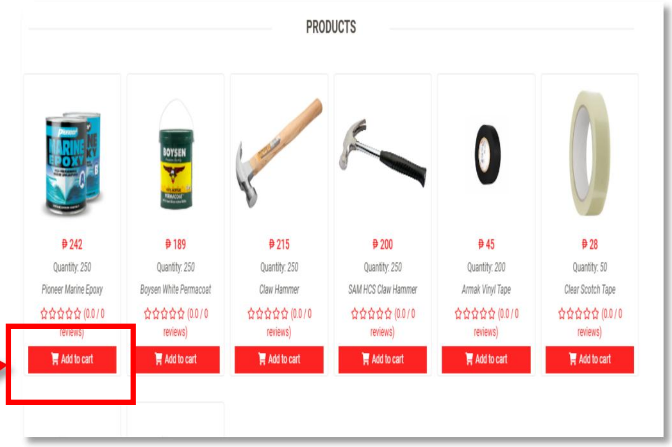


Additional Tips

- Ensure your internet connection is stable to avoid login interruptions.
- If you're having trouble entering your password, click the **eye icon** next to the password field to temporarily reveal the password. This can help you ensure there are no typos, especially if the password is long or complex.
- If you don't have an account yet, simply click the **Sign Up** button on the login page to create a new account.

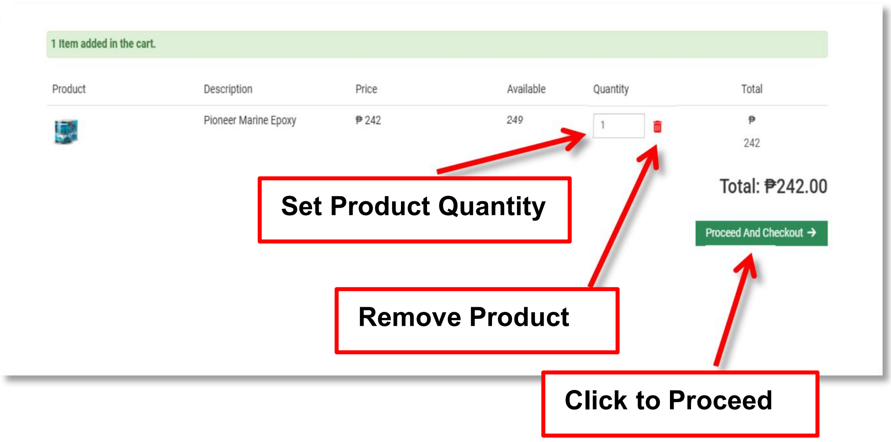
IV. Choosing a Category and Adding Items for your Cart

Once you are on the **Products Page**, choose a category from the list (such as **Hand Held Tools**, **Paint**, **Sealants**, etc.), browse through the available products, and click the **Add to Cart** button next to the item you wish to purchase.



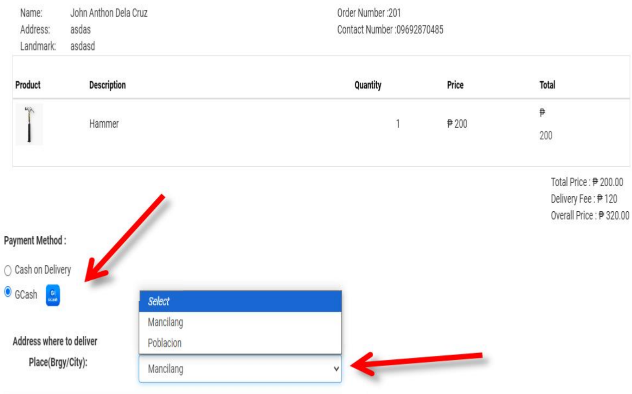
V. Cart Page

After clicking **Add to Cart**, you will be redirected to the **Cart Page**, where you can review the items you've selected. Here, you will have the option to set the quantity of each product by adjusting the quantity box next to the item. If you decide you no longer want a product, click the Remove button next to the item to remove it from your cart. Once you're ready to proceed, click **Proceed to Checkout** to enter your shipping address and choose a **payment method**. After completing these steps, you will be guided to finalize your order.

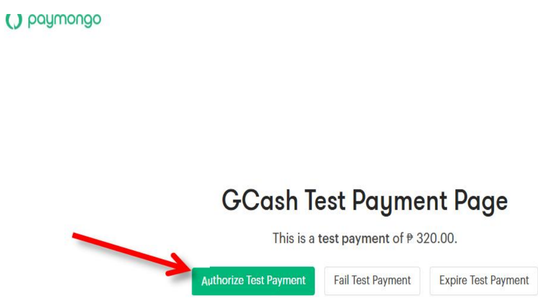


VI. Order Summary

After clicking **Proceed to Checkout** you will be redirected to the **Order Summary** page, where you can review the products you've ordered. On this page, you will also select your **payment method**, with options to choose either **GCash** or **Cash on Delivery**. Once you've selected your payment method, enter your **delivery address** where the items will be shipped. After confirming all the details, click **Submit Order** to complete your purchase.

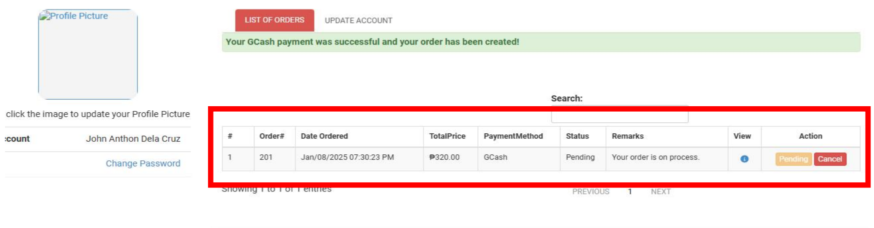


If you choose **GCash** as your payment method, after submitting your order, you will be redirected to **PayMongo** to authorize the payment. On the PayMongo page, click the **Authorize** button to proceed with the payment. Follow any on-screen instructions to complete the payment process.



VII. Profile Page

Once your payment is authorized or your order is submitted, you will be redirected to your **Profile Page**, where you can view your order details and track the status of your orders.



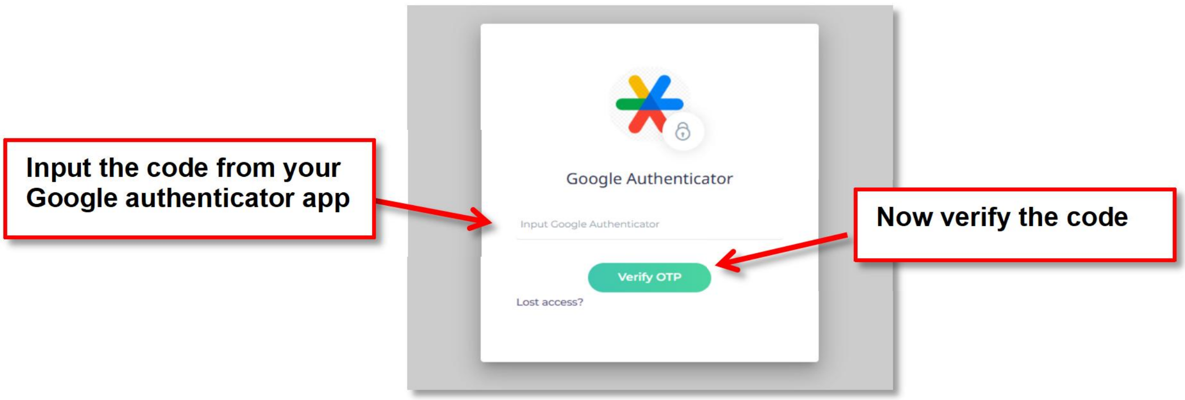
VIII. Admin Google Authenticator

This guide offers detailed instructions on how to access the admin page of your system, outlining the steps for **two-factor authentication** to securely log in.

What to do next

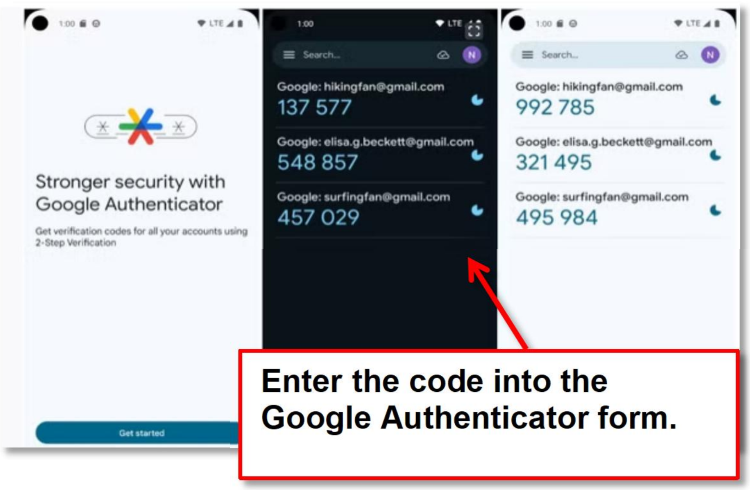
Enter the Google Authenticator Code:

- On the **Admin Login Page**, you will be prompted to enter the **Google Authenticator** code.



- Open the **Google Authenticator** app on your device and enter the time-sensitive code displayed.

After entering the **Google Authenticator** code, click the **Verify** button. If the code is valid, you will be redirected to the **login form** as the second layer of authentication.



Note: Make sure to **choose your account** in the **Google Authenticator app** before entering the code. The app will generate a time-sensitive code, which you can then input into the form to proceed.

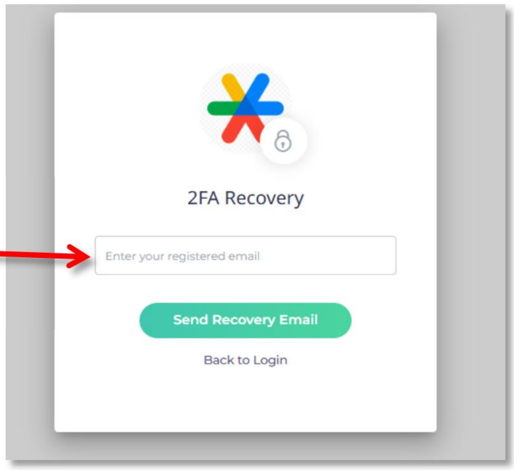
Note: The Google Authenticator code refreshes every **30 seconds**, so make sure to enter the current code within that time frame.

Lost Access

- If you have lost access to your Google Authenticator or cannot generate the code, click the **"Lost Access?"** link below the login form.

You will be prompted to input your **Email** address associated with the admin account.

Enter the email address associated with your admin account



After submitting your email you will receive a **key** via email.

2FA Recovery Information

Dear John Anthon Dela Cruz,

Your new 2FA secret key is: F6Q3BSQ527BFHNYA

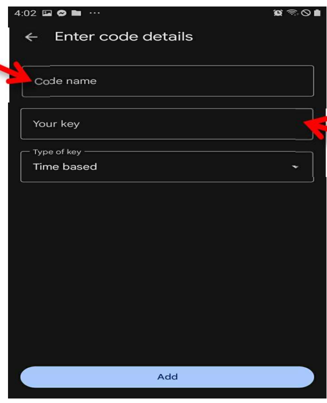
Please enter this key in your authenticator app to continue using 2FA.

For security reasons, please do not share this key with anyone.

Open the **Google Authenticator** app and input the key provided to regain access.

Instructions: Open the **Google Authenticator** app, and follow these steps:

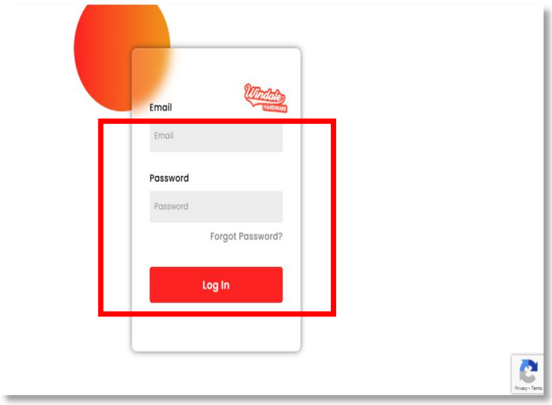
- Tap the **plus (+)** icon to add a new account.
- Select the option to **enter a setup key**.
- Input the **code name** provided in the email, then paste the **key** received.



IX. Admin Login Form

After successfully passing the two-factor authentication, proceed to enter your **Email** and **Password** on the **login form**.

Click the **Login** button to access the **admin dashboard**. Upon successful login, you will be redirected to the **admin dashboard**, where you can begin managing all administrative functions.

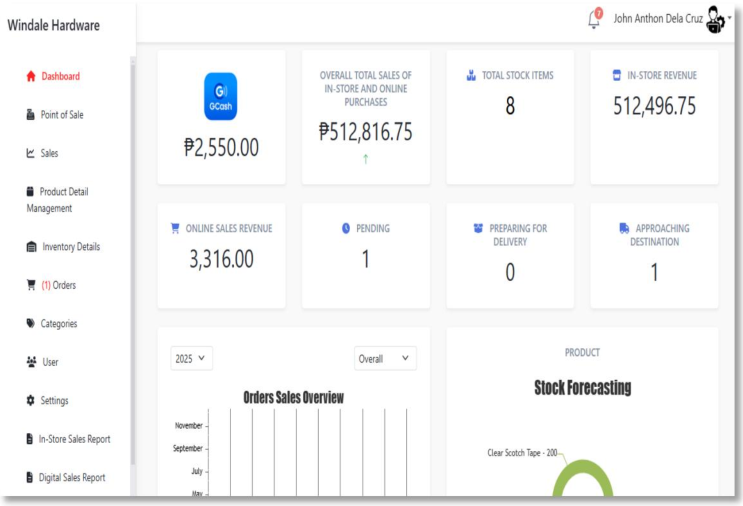


Following login

After successfully logging in, you will be redirected to the **admin dashboard,** where you can begin managing all **administrative functions**.

Upon viewing the dashboard, you will see an overview of key statistics that provide insight into your store's performance:

- **Sales Record**: Displays a detailed record of daily, monthly, and yearly sales, helping you monitor trends and performance over time.
- **Stock Forecasting**: Provides predictions on stock levels based on sales trends, ensuring you're well-prepared for future inventory needs.



- **Total GCash Amount**: Displays the total amount of sales made via GCash, giving you a clear overview of payments processed through this method.

User Profile and Options (Top Right):

Displays the logged-in user's name (e.g., "**John Anthon Dela Cruz**") and profile picture.

Actions:

- **Click on the profile** to view options such as:
  - **Update**: Update your profile information.
  - **Sign Out**: Log out from the admin panel safely.

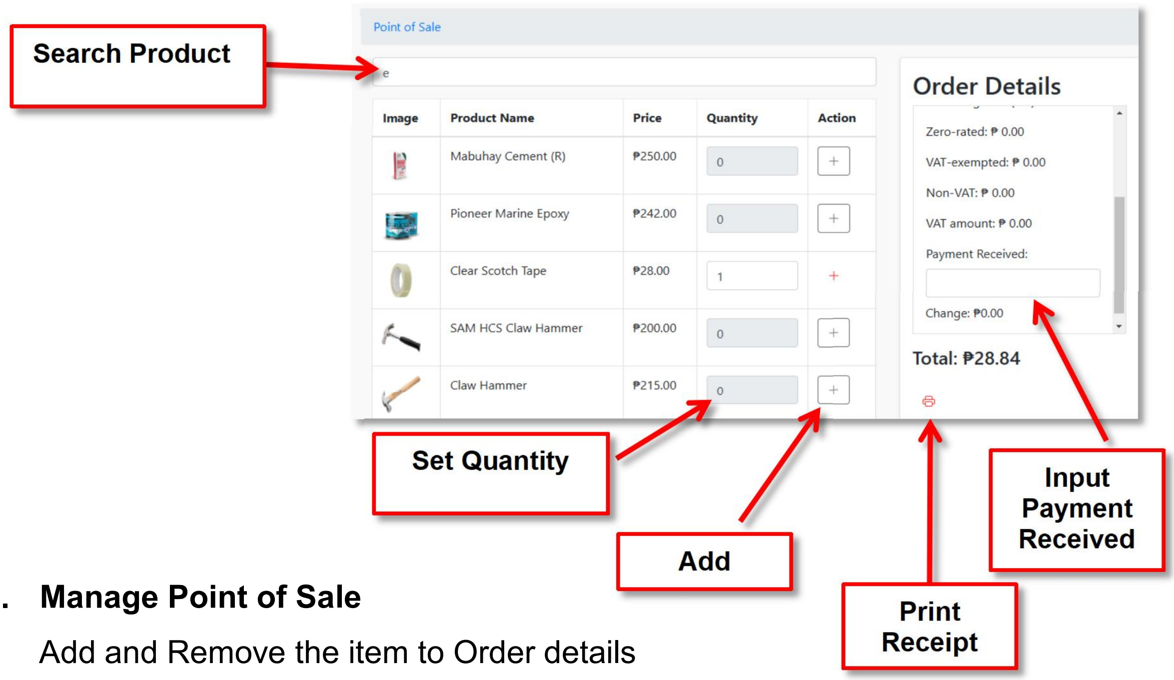
Notifications Icon (Bell):

Click the **bell icon** to view system notifications, such as **stock level alerts** or other important messages, to keep track of product availability and store updates.

X. SIdebar Menu

Sidebar Menu on the left to navigate through different sections of the admin dashboard.

- **Point of Sale (POS)**

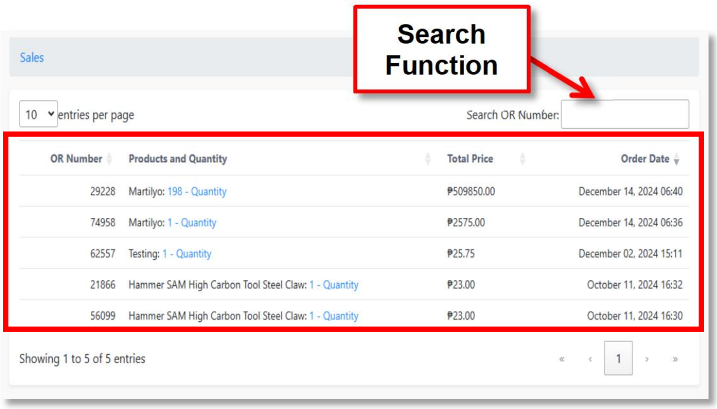


1. Manage Point of Sale

- Add and Remove the item to Order details
- Input a product name to view all the item

2. Manage Sales

Manage Sales section, you can view a comprehensive table displaying all the sales records from the **Point of Sale (POS)** system.



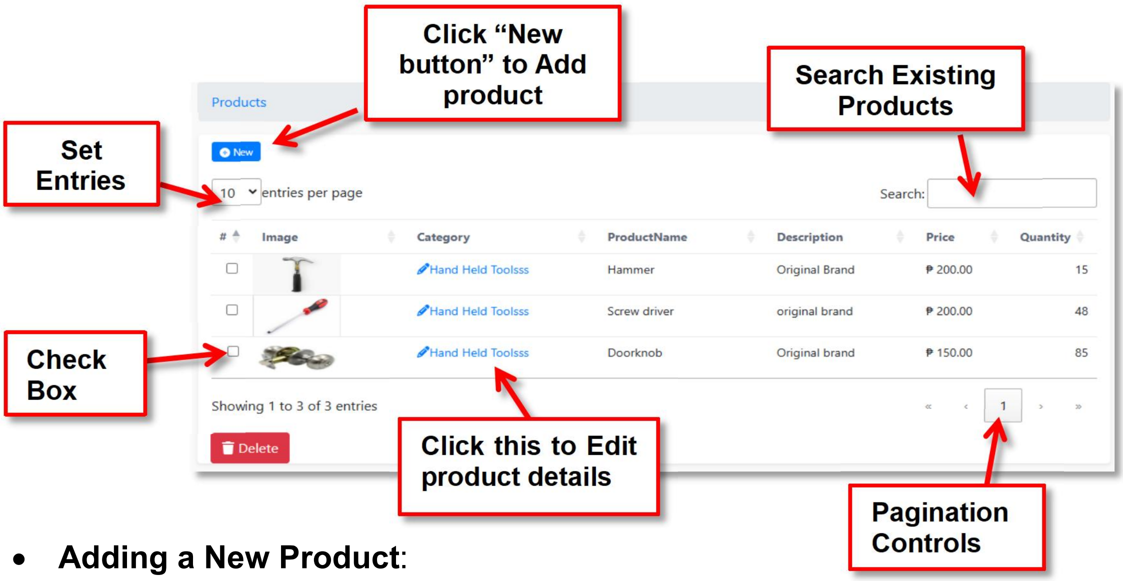
- **Viewing Sales Records**:
  The table will display key details such as the **OR Number**, **Product and Quantity** , **Total Price**, and **Ordered Date**. To view additional records, click on the **entries** to show more sales records.
- **Search Function**:
  The search bar allows you to quickly find specific transactions by entering keywords like OR Number and product names.

3. Manage Products Display on the Page

The **Manage Products** section allows you to view, add, update, and delete product information. Here's how to use its features effectively:

Table Overview:
The table displays the current list of products with the following details:

- **# (Index)**: The product's position in the list.
- **Image**: A visual representation of the product.
- **Category**: The category to which the product belongs.
- **Product Name**: The name of the product.
- **Description**: Brief details about the product.
- **Price**: The product's selling price.
- **Quantity**: The current stock available.



- **Adding a New Product**:

    - · Click the **"New"** button (blue) located above the table.
    - Fill in the required fields (e.g., Image, Category, Product Name, Description, Price, and Quantity) in the form that appears.
    - Submit the form to add the product to the list.

· **Editing a Product**:

- · Click the **blue pencil icon** next to the product you want to update in the **Category** column.
- Modify the details as needed in the form provided.
- Save your changes to update the product information.

· **Deleting a Product**:

- · Select the checkbox next to the product(s) you wish to remove.
- Click the **"Delete"** button (red) below the table.
- Confirm the deletion to permanently remove the selected products.

· **Searching for Products**:

- · Use the **Search** bar located on the top-right of the table to quickly find products by their name, category, or other attributes.

· **Pagination and Entries per Page**:

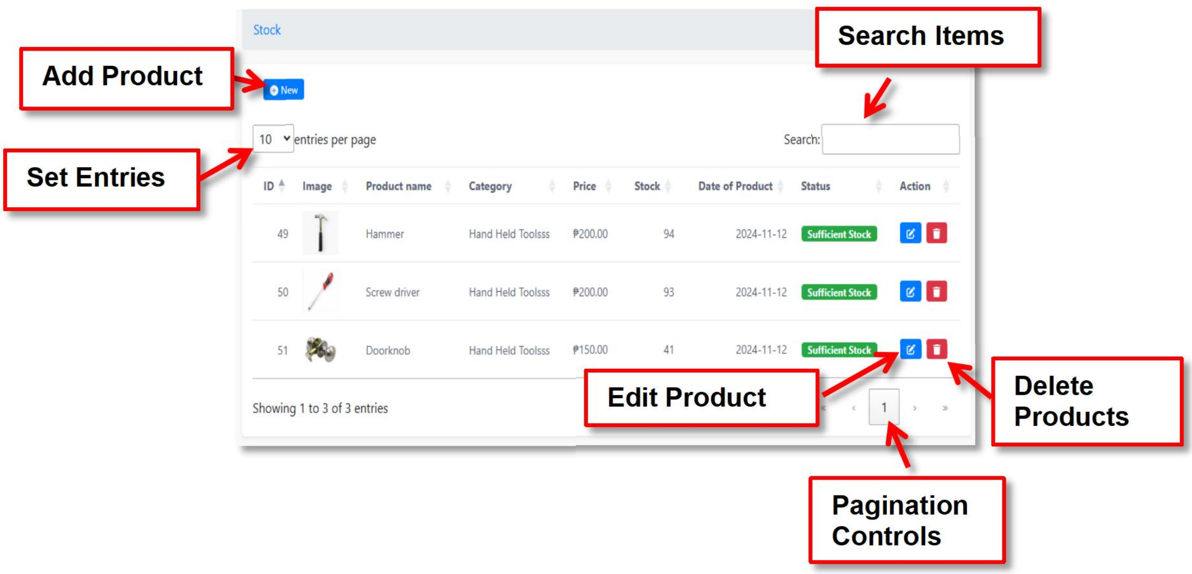
- · Adjust the **entries per page** dropdown to control how many products are displayed at once.
- Navigate through the pages using the pagination controls at the bottom-right corner of the table.

4. Manage Inventory

The **Manage Stock** section allows you to monitor and update the inventory levels of your products. This interface is designed to help you keep track of stock levels, product details, and their availability status.

Table Overview:
The table displays detailed information about your stock, including:

- **ID**: A unique identifier for each product.
- **Image**: A preview of the product's appearance.
- **Product Name**: The name of the product.
- **Category**: The category it belongs to.
- **Price**: The selling price of the product.
- **Stock**: The current inventory level.
- **Date of Product**: The date the product was added or last updated.
- **Status**: Indicates if the stock level is sufficient, low, or out of stock.
- **Action**: Provides options to update or delete a product.



Adding New Stock:

- · Click the **"New"** button (blue) located above the table.
- Fill in the required fields in the form that appears, such as the Product Name, Category, Price, and Stock.
- Submit the form to add the product to the stock list.

· **Updating Stock**:

- · Click the **Edit (Blue Pen)** icon in the **Action** column for the product you want to modify.
- Update the stock or other details in the form provided.

· **Deleting Stock**:

- · Click the **Delete (Red Trash Bin)** icon in the **Action** column for the product you want to remove.
- A confirmation prompt will appear to ensure you want to proceed with the deletion.
- Confirm the action, and the product will be permanently removed from the stock list.

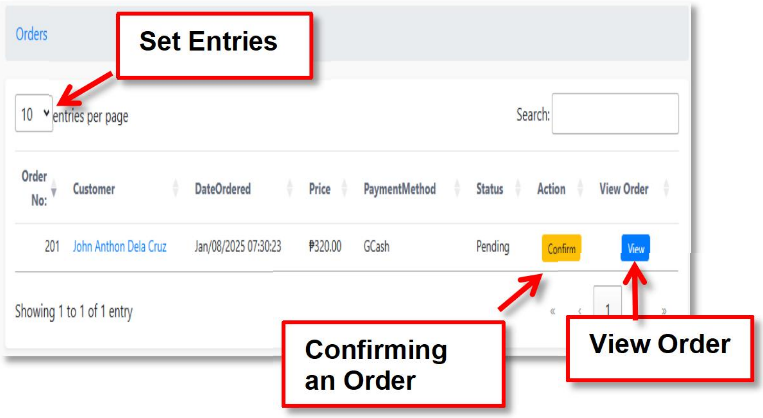
5. Manage Customer Orders

The **Manage Orders** section enables you to monitor, confirm, and update the status of customer orders. This section ensures efficient order processing and provides details of each transaction.

Table Overview:
The table displays essential information about orders, including:

- **Order No.**: A unique identifier for each order.
- **Customer**: The name of the customer who placed the order.
- **Date Ordered**: The exact date and time when the order was placed.
- **Price**: The total amount for the order.
- **Payment Method**: Indicates whether the customer selected **Gcash** or **Cash on Delivery** as the payment method.

- **Status**: The current status of the order (e.g., Pending, Confirmed).
- **Action**: Options to confirm or process the order.



- **View Order**: View detailed information about the order items.

Confirming an Order:

- · Locate the **Confirm (Yellow Button)** in the **Action** column for the specific order.
- Click the button to update the order status to **Confirmed**.
- Once confirmed, an additional button labeled **Delivery Status** will appear, allowing you to track and update the delivery progress.

· **Updating Delivery Status**:

- · After confirming an order, click the **Delivery Status** button.
- Update the status to reflect the order's delivery progress (e.g., Approaching Destination, Delivered).
- This ensures both you and the customer remain informed about the order's status.

· **Viewing Order Details**:

- · Click the **View (Blue Button)** in the **View Order** column.
- This provides a detailed breakdown of the order, including itemized products, quantities, and prices.

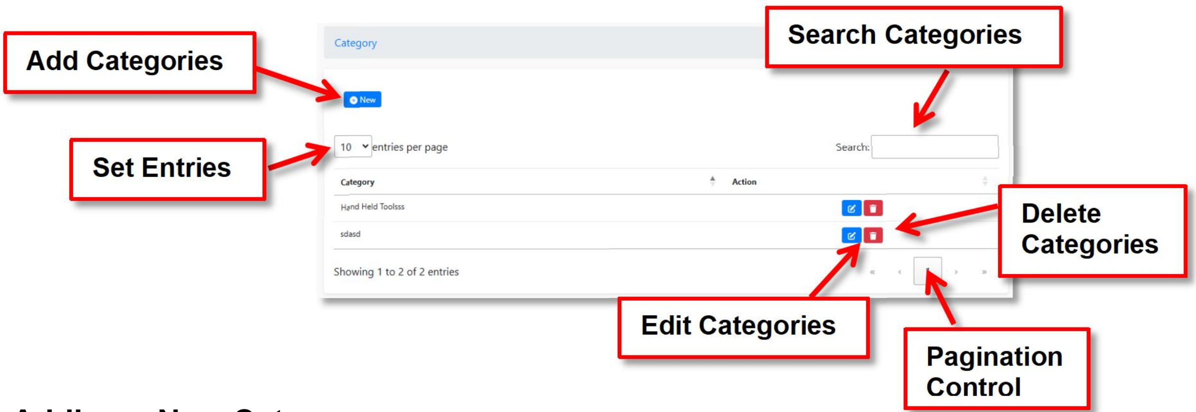
6. Manage Categories

The **Category Management** section allows administrators to create, update, and manage product categories efficiently. This feature ensures that products are organized under appropriate categories for better usability and searchability.

Table Overview

The table in this section displays key information about product categories, including:

- **Category**: The name of the category.
- **Action**: Options to manage the category:
  - **Edit (Blue Button)**: Update the category name.
  - **Delete (Red Button)**: Remove the category from the system.



Adding a New Category:

- Click the **New** button.
- Fill out the category name in the form.
- Click **Save** to add the category.

Editing a Category:

- Click the **Edit (Blue Button)** in the **Action** column next to the category you wish to modify.
- Update the category name in the form that appears.
- Click **Save** to apply the changes.

Deleting a Category:

- Click the **Delete (Red Button)** in the **Action** column next to the category you wish to remove.
- Confirm the deletion when prompted. Be cautious, as this action is irreversible.

Navigating Pages:

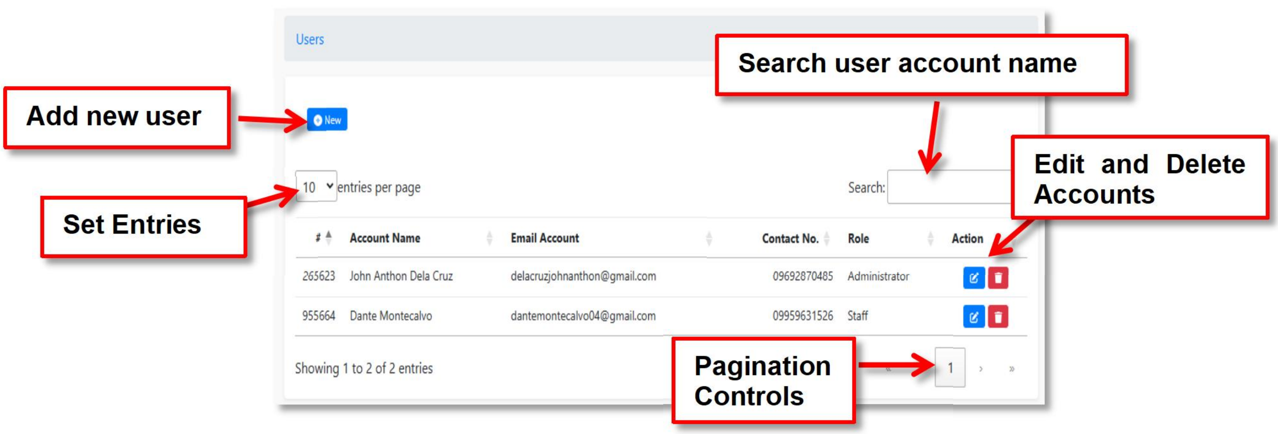
- Use the pagination controls at the bottom of the table to navigate through multiple pages of categories.

7. Manage Users Account

Table Overview

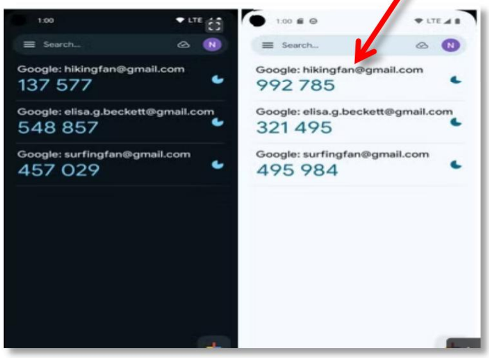
The table in this section displays essential details about system users, including:

- **# (ID)**: A unique identifier assigned to each user.
- **Account Name**: The full name of the user.
- **Email Account**: The email address associated with the user.
- **Contact No.**: The user's contact number.
- **Role**: The role of the user (e.g., Administrator, Staff).
- **Action**: Options to manage the user:
  - **Edit (Blue Button)**: Update the user's details.
  - **Delete (Red Button)**: Remove the user from the system.

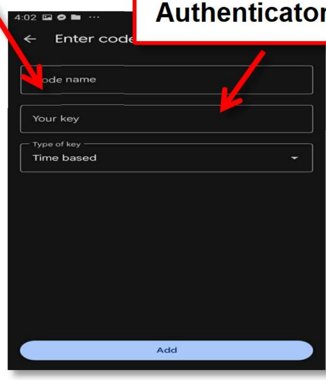


Adding a New User:

- Fill out the required details in the form, such as account name, email, contact number, and role.
  - Click the **Generate** button to generate a QR code for Google Authenticator.
  - A QR code will appear for scanning with the Google Authenticator app.



- Below the QR code, a unique key will also be displayed for manual input in the app, if needed.
- Click **Save** to add the new user and complete the setup.



Editing a User:

- Click the **Edit (Blue Button)** in the Action column next to the user you wish to modify.
- Update the user's details in the form that appears.
- Click **Save** to apply the changes.

Deleting a User:

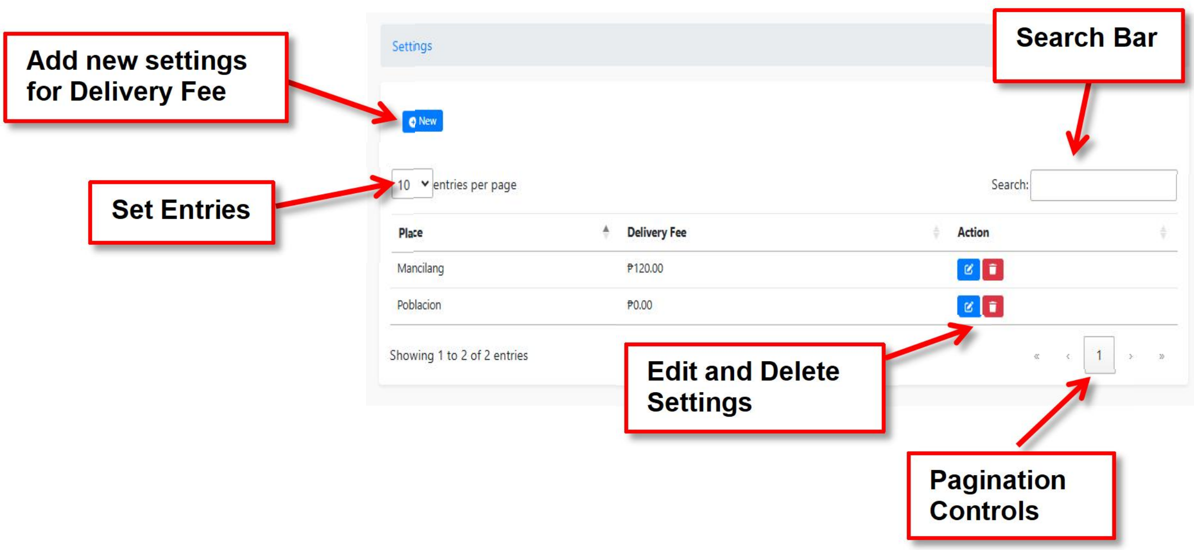
- Click the **Delete (Red Button)** in the Action column next to the user you wish to remove.
- Confirm the deletion when prompted. Be cautious, as this action is irreversible.

8. Manage Categories

Table Overview

The table in this section displays essential details about the delivery places and fees, including:

- **Place**: The name of the delivery location.
- **Delivery Fee**: The delivery charge for the specified place.
- **Action**: Options to manage the entries:
    - **Edit (Blue Button)**: Update the details of the selected delivery place.
    - **Delete (Red Button)**: Remove the delivery place from the system.



Managing Delivery Places

Adding a New Delivery Place

- Click the **New** button.
- Fill out the required details in the form:
    - Place name (e.g., "Mancilang").
    - Delivery fee (e.g., "₱120.00").
- Click **Save** to add the new entry.

Editing a Delivery Place

- Click the **Edit (Blue Button)** in the **Action** column next to the place you wish to modify.
- Update the details (e.g., change the delivery fee or correct the place name).
- Click **Save** to apply the changes.

Deleting a Delivery Place

- Click the **Delete (Red Button)** in the **Action** column next to the place you wish to remove.
    - Confirm the deletion when prompted.
    - Be cautious, as this action is irreversible.

Navigating Pages

- Use the **pagination controls** at the bottom of the table to navigate through multiple pages of entries.
- Adjust the **entries per page** setting to customize the number of items shown on the table.

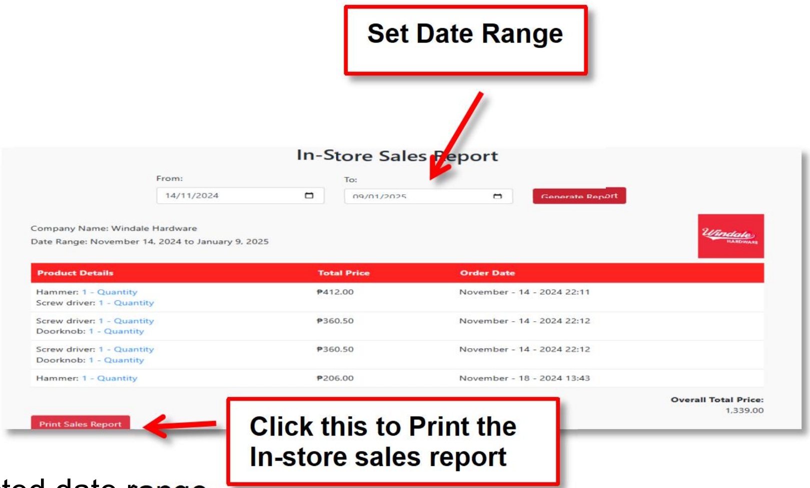
9. In-Store Sales Report

The In-Store Sales Report provides a summary of products sold within the store over a specific date range.

Table Details:

- **Product Details**: Lists the product name, quantity purchased (hyperlinked for more details).
- **Total Price**: Displays the total price of the products sold for each transaction.
- **Order Date**: Shows the date and time when the order was placed.

Features:



Date Range Selection:

- **Select the Start Date and End Date** using the provided date pickers.
- **Click the "Generate Report" Button** to refresh the report based on the selected date range.

Company Information:

- **Company Name:** Displays the name of the company (e.g., **Windale Hardware**).

Overall Total Price:

- A calculation displayed at the bottom right, summarizing the total sales for the given date range.

Print Sales Report:

Click the "Print Sales Report" Button located at the top or bottom of the page.

- The report will open in a print-friendly format.
- **Click "Print"** to generate a hard copy of the report.

10. Digital Sales Report

The Digital Sales Report focuses on products sold through digital channels over a specific date range.

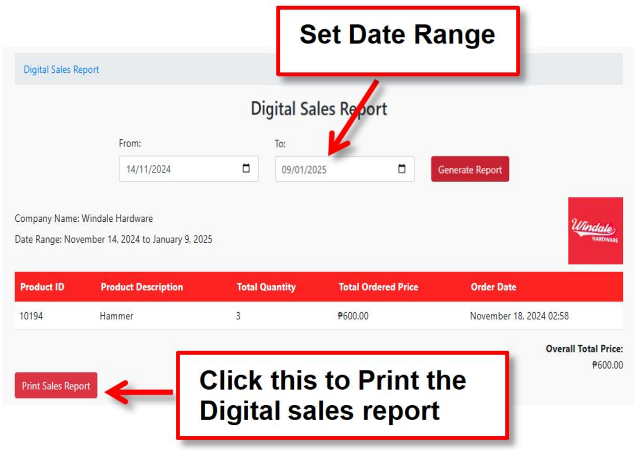
Table Details:

- **Product ID**: A unique identifier for the product.
- **Product Description**: A brief description of the product sold.
- **Total Quantity**: The total number of items sold for that product.
- **Total Ordered Price**: The total price for all sold quantities of the product.
- **Order Date**: Displays the date and time when the order was placed.

Features:

Date Range Selection:

- **Select the Start Date and End Date** using the date pickers provided.
- Click the **Generate Report** button to refresh results.



Company Information:

- **Company Name:** Shows the name of the company (e.g., **Windale Hardware**).

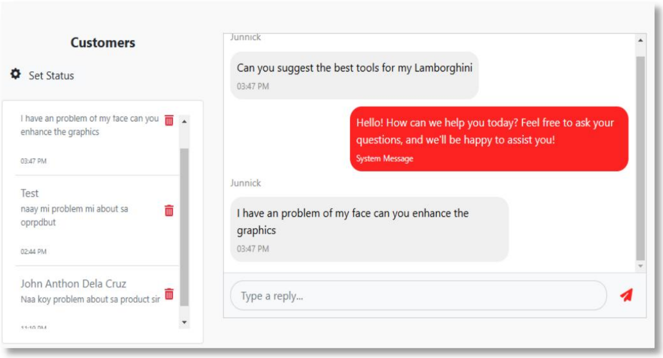
Overall Total Price:

- A summary of the total sales amount for digital transactions, displayed at the bottom right.

Print Sales Report:

- **Click the "Print Sales Report" Button** at the top or bottom of the page.
- The report will open in a print-friendly format.
- **Click "Print"** to generate a hard copy of the report.

11. Chat Application Dashboard

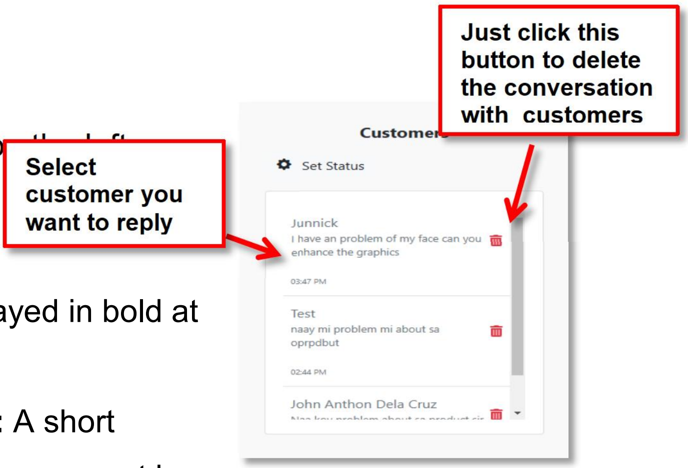


The **Chat Application Dashboard** allows the admin to manage customer inquiries and respond to messages in real-time. The interface is divided into two main sections: the **Customer List** and the **Chat Window**.

Managing Customer List (Left Panel)

The **Customer List** displays the names of customers along with their most recent messages.

Viewing Customer Details:



1. **Check the customer entries on the left** panel.
2. Each entry shows:
   1. **Customer Name:** Displayed in bold at the top of the entry.
   2. **Last Message Preview:** A short preview of the latest message sent by the customer.
   3. **Timestamp:** The time when the last message was received.

Deleting a Customer Conversation:

1. **Click the Delete Icon (Trash Bin)** next to the customer's name.
2. **Confirm the deletion** when prompted.

3. **Note:** Be cautious when deleting a conversation, as this action is **permanent**.

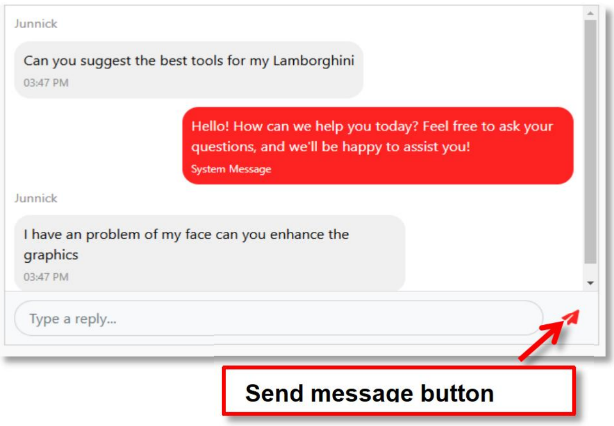
Using the Chat Window (Right Panel)

The **Chat Window** displays the conversation history with the selected customer and allows the admin to reply in real-time.

Viewing a Conversation:

1. **Click a customer entry** from the left panel to open their conversation.
2. The chat window will display:
    1. **Header:** Shows the selected customer's name at the top.
    2. **Conversation History:** Displays a chronological list of messages exchanged between the admin and the customer.

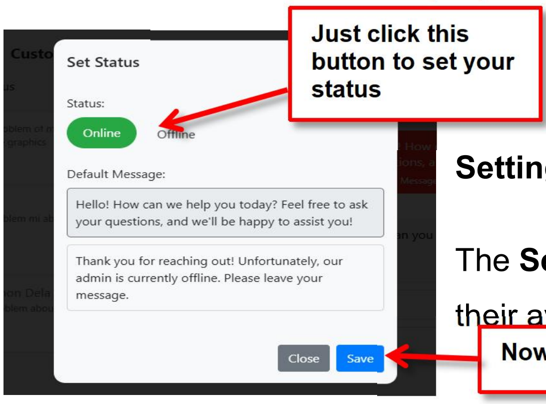
Understanding Message Types:



- **Customer Messages:** Displayed in **light grey** chat bubbles for clarity.
- **System Messages:** Highlighted in **red** chat bubbles to provide important prompts or instructions.

Sending a Message:

1. **Type your response** in the **Message Input Field** at the bottom of the chat window.
2. **Click the Send Button (Paper Plane Icon)** to send the message in real-time.



Setting the Chat Status

The **Set Status Option** allows the admin to update their availability or the chat system's status.

Updating the Status:

1. **Click the "Set Status" button** in the left panel.
2. **Choose the desired status** (e.g., **Online** or **Offline**).
3. The selected status will be updated for all users interacting with the chat.

Features of the Chat Application Dashboard

Real-Time Messaging:

- Enables two-way communication between the admin and customers without needing to refresh the page.
- Messages are instantly updated on both the admin and customer sides.

User-Friendly Design:

- Clear separation between the **Customer List** and the **Chat Window**.
- Easy navigation to switch between different customer conversations.

Message Management:

- You can view message history, reply to customer inquiries, and delete conversations directly from the dashboard.