Invenire Stock Inventory Manager

Web based ERP software for managing stock inventory
with advanced POS system

User manual

Index of Contents For Admin Panel

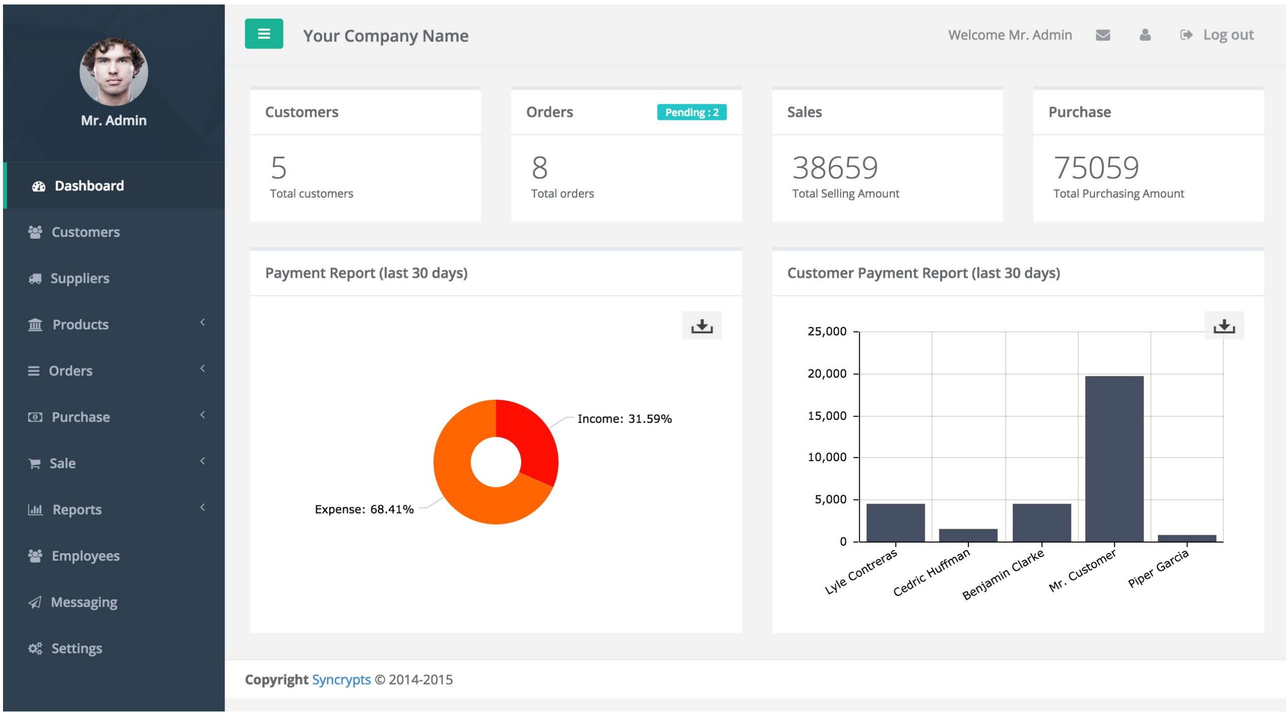
- Profile Settings

- Customer Panel Description
- Purchase Staff Panel Description
- Sales Staff Panel Description

Admin Panel

1. DASHBOARD

* Total customers , total orders with pending ones , total sales and total purchase at a glance.
* Chart representation of payment report and customer payment report for the last 30 days.

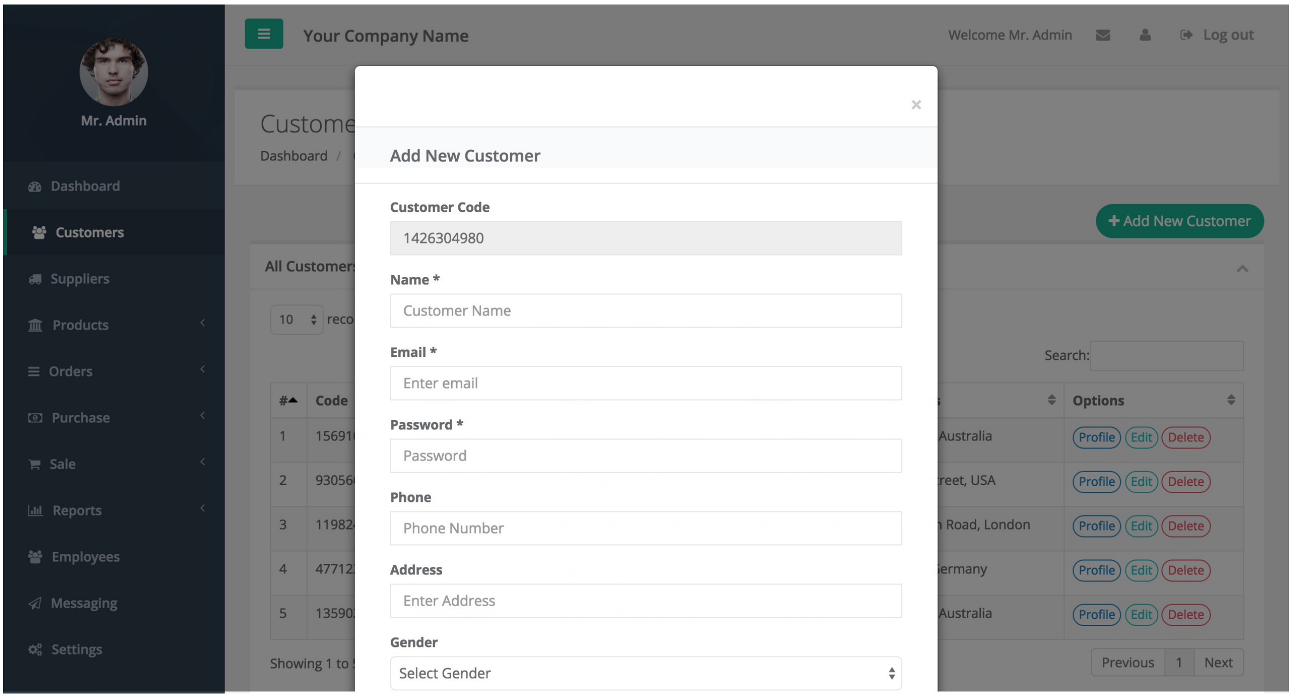


2. MANAGE CUSTOMERS

* Create a customer profile
* Browse the profile of different customers of your company with all the details about that customer
* Edit any customer information
* Delete customer

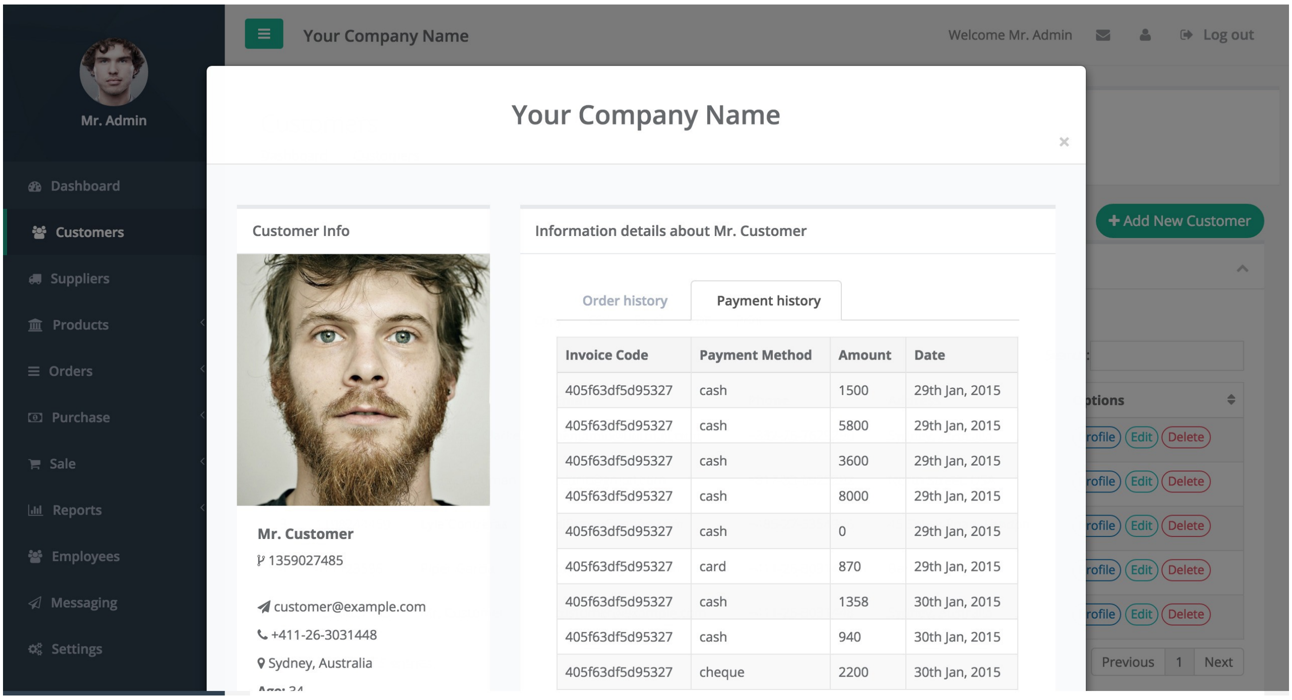
— *how to create a new customer?*

From admin panel navigation bar on the left, move to the page customer and click the add new customer button on the top right.
Fill all the informations required and save. With the creation of new account, a mail is sent to that customer with his/her basic account informations.



— *how to browse a customer profile?*

In the customer page there is a table for all customers where admin can find a list of the customers.
For each customer there is a profile button the table. Click the button to see the full detailed profile of the customer including basic informations, the order history, the sales to the customer from the company and also the payment history of that customer.



— *how to edit or delete a customer account?*

In the customer page of admin panel, admin can find two other buttons just after profile button for each customer.
Clicking the edit button admin can edit the basic informations about the customer and the delete button to delete all the saved informations about the customer from the company database.

2. MANAGE SUPPLIERS

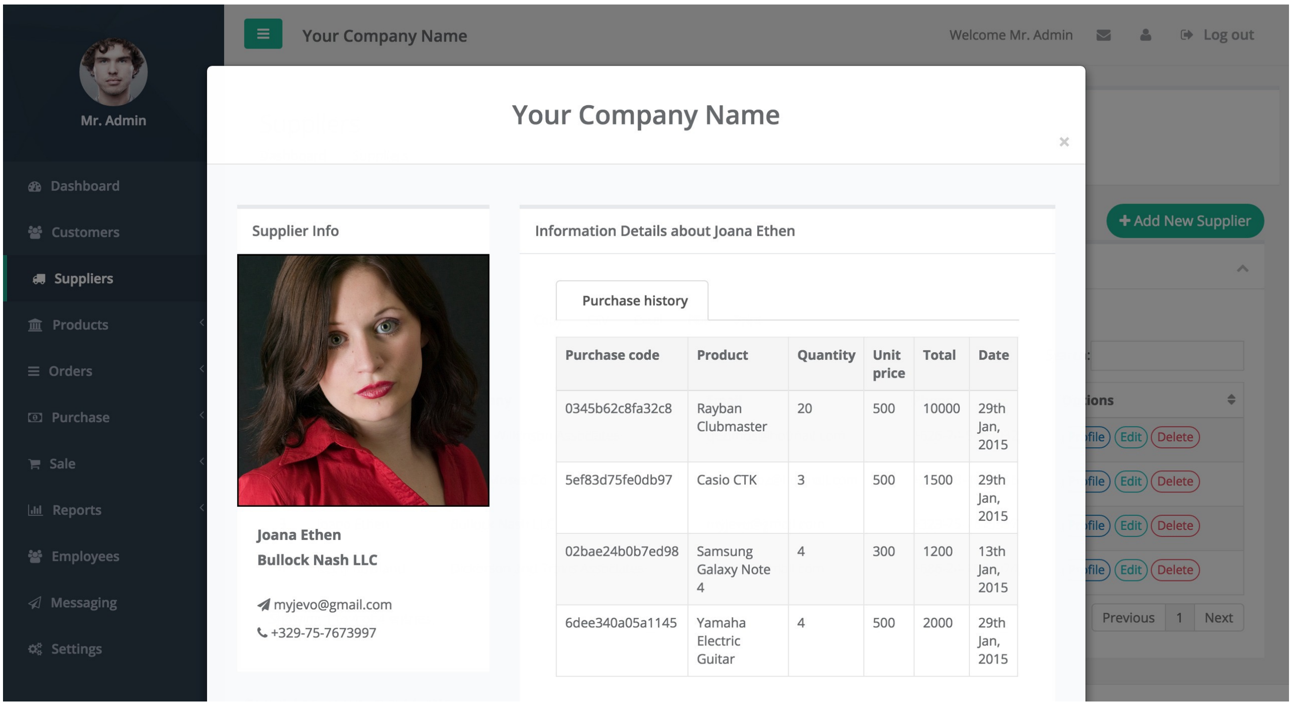
* Create a supplier profile
* Browse the profile of different suppliers for your company with all the basic informations
* Edit any supplier information
* Delete supplier

— *how to create a new supplier?*

#From admin panel navigation bar on the left, move to the page supplier and click the add new supplier button on the top right.
Fill all the informations required and save.

— *how to browse a supplier profile?*

In the supplier page there is a table for all suppliers where admin can find a list of the suppliers.
For each supplier there is a profile button the table.
Click the button to see the full detailed profile of the supplier including basic informations and the purchase history of the company from that particular supplier.



— *how to edit or delete a supplier account?*

In the supplier page of admin panel, admin can find two other buttons just after profile button for each supplier.
Clicking the edit button admin can edit the basic informations about the supplier and the delete button to delete all the saved informations about the supplier from the company database.

3. MANAGE PRODUCTS

* Add a new product
* Browse the details of different products of your company.
* Edit any product information
* Delete product

— *how to add a new product?*

From admin panel navigation bar on the left, move to the page product and from the dropdown, go to the page manage products.
Here admin can add a new product by clicking the button named add new product and fill the informations and save.
Here in the pop up of new product add form, you have already seen two fields for the product category and sub-category.

— *add a new category*

From the product dropdown menu, go to category page and follow the similar way as of adding a new product.
Admin edit the informations saved and also delete the category.

— *add a new sub-category*

From the product dropdown menu, go to sub-category page and follow the similar way as of adding a new product or adding a new category.
Admin edit the informations saved and also delete the sub-category.

— *how to browse a product detail?*

In the manage product page, admin can find a button named details for each of the products saved.

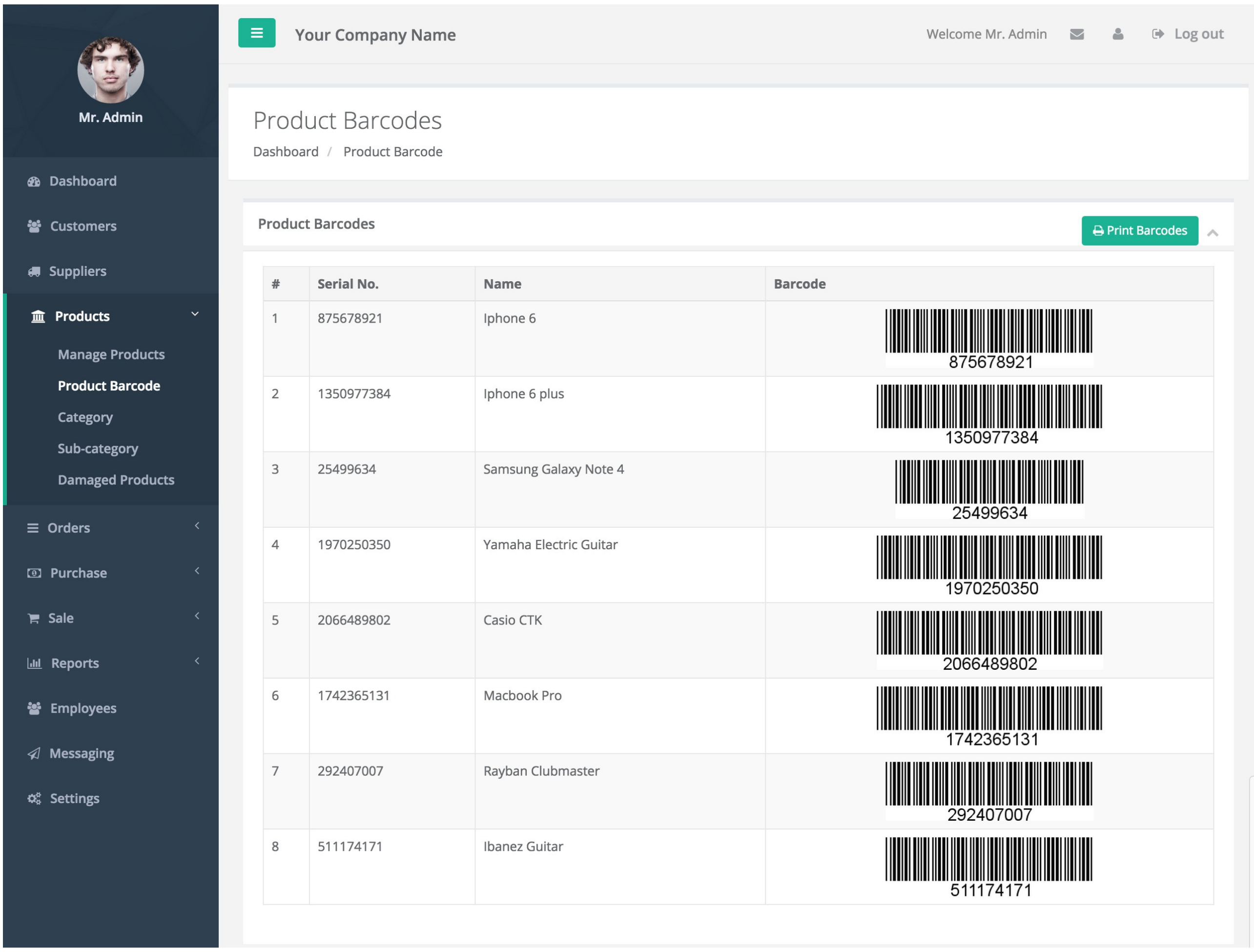
Clicking the button he/she can browse the product details.

— *how to edit or delete a product?*

In this same page of manage product, there are two buttons named edit and delete for each of the products saved.
Clicking the edit button, admin can edit the informations about the product and clicking the delete button he/she can delete the product from the company database.

PRODUCT BARCODE

In the product dropdown menu admin can move to the page product barcode where all the saved product's serial numbers are converted to barcodes automatically and they can be printed out for later use in the identification of products.

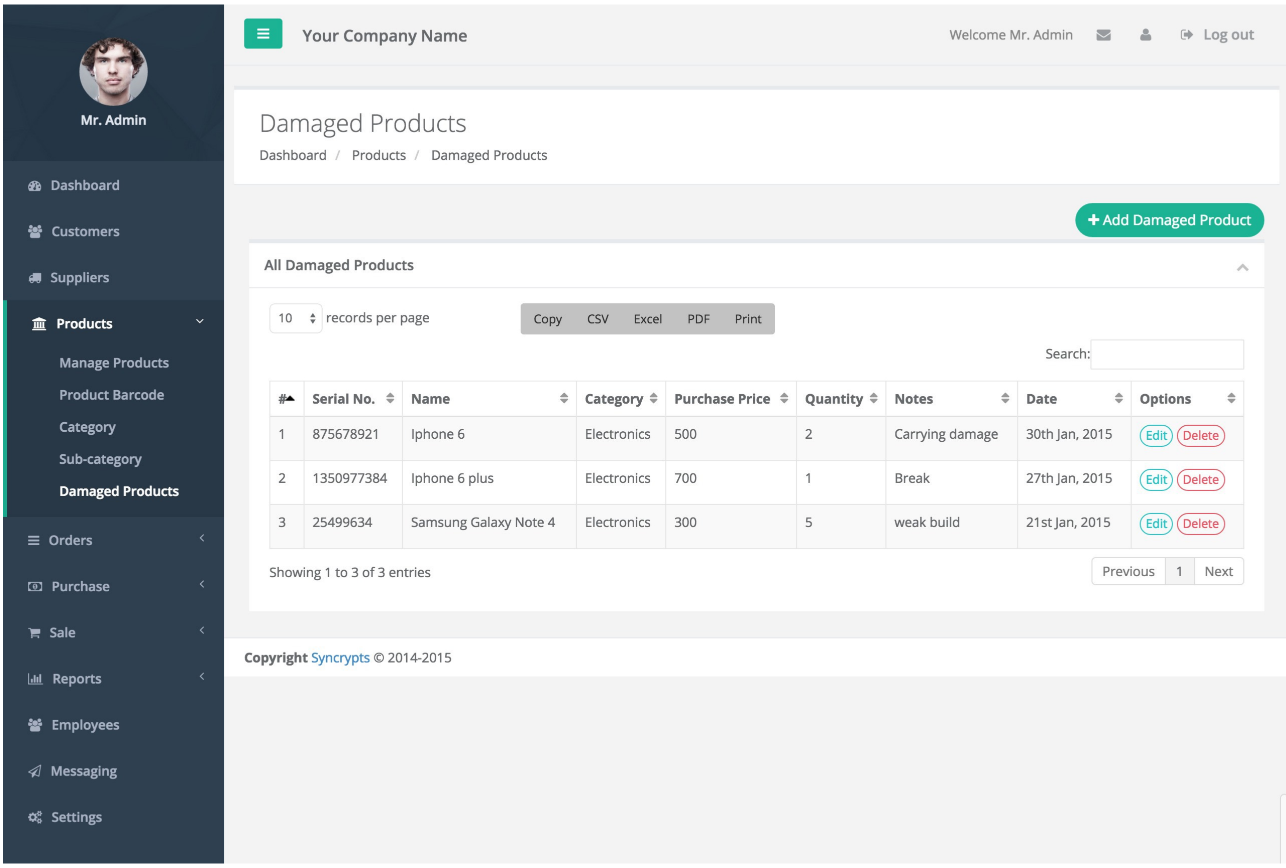


DAMAGED PRODUCTS

* Add damage product
* Edit or delete the damaged product from list

— *how to browse add a damaged product?*

From the product dropdown menu, go to the page damaged product and click the button named add damaged product.
Fill the informations and save.

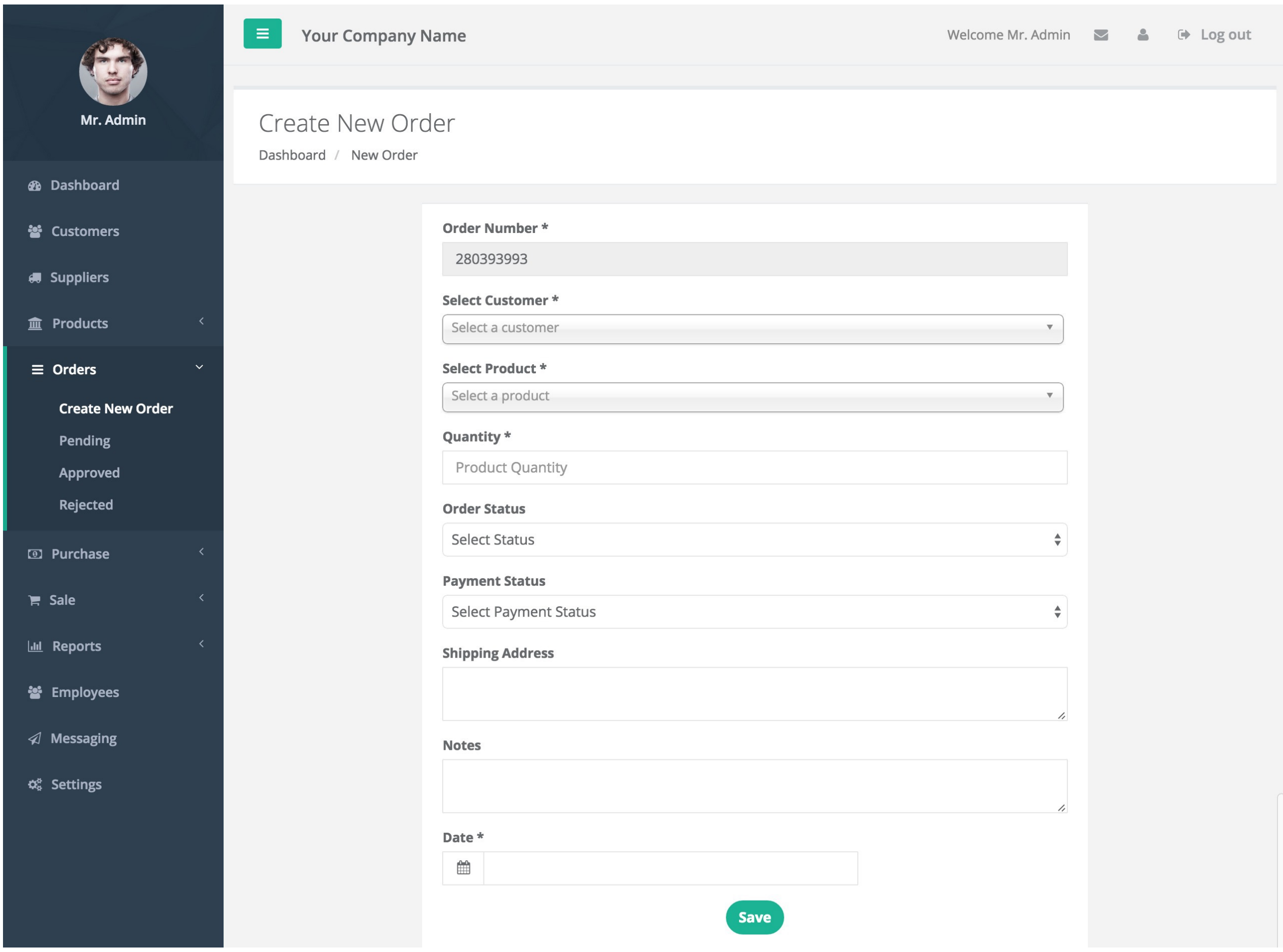


— *how to edit or delete?*

In the damaged product page, the table listing for damaged products contain buttons named edit and delete for each of the damaged products entered by the admin. Click the edit button to edit the informations about the damaged product and delete button to delete that item from the entry.

4. MANAGE ORDERS

* Create a new order for a specific customer
* Browse the orders created by admin and also sent by customers in separate pages of pending orders, approved orders and rejected orders.
* Update order informations
* Delete orders



— *how to create a new order?*

From the admin panel navigation menu, move to orders and open the page named create new order.
Fill all the necessary informations of the order and save.
If the order or payment status are not filled by admin, order status is saved as pending and the payment status is saved as unpaid by default.
On the creation of new order, a mail is sent to the customer for whom the order has been created by admin to notify that customer.

— *how to monitor the orders and update the order informations?*

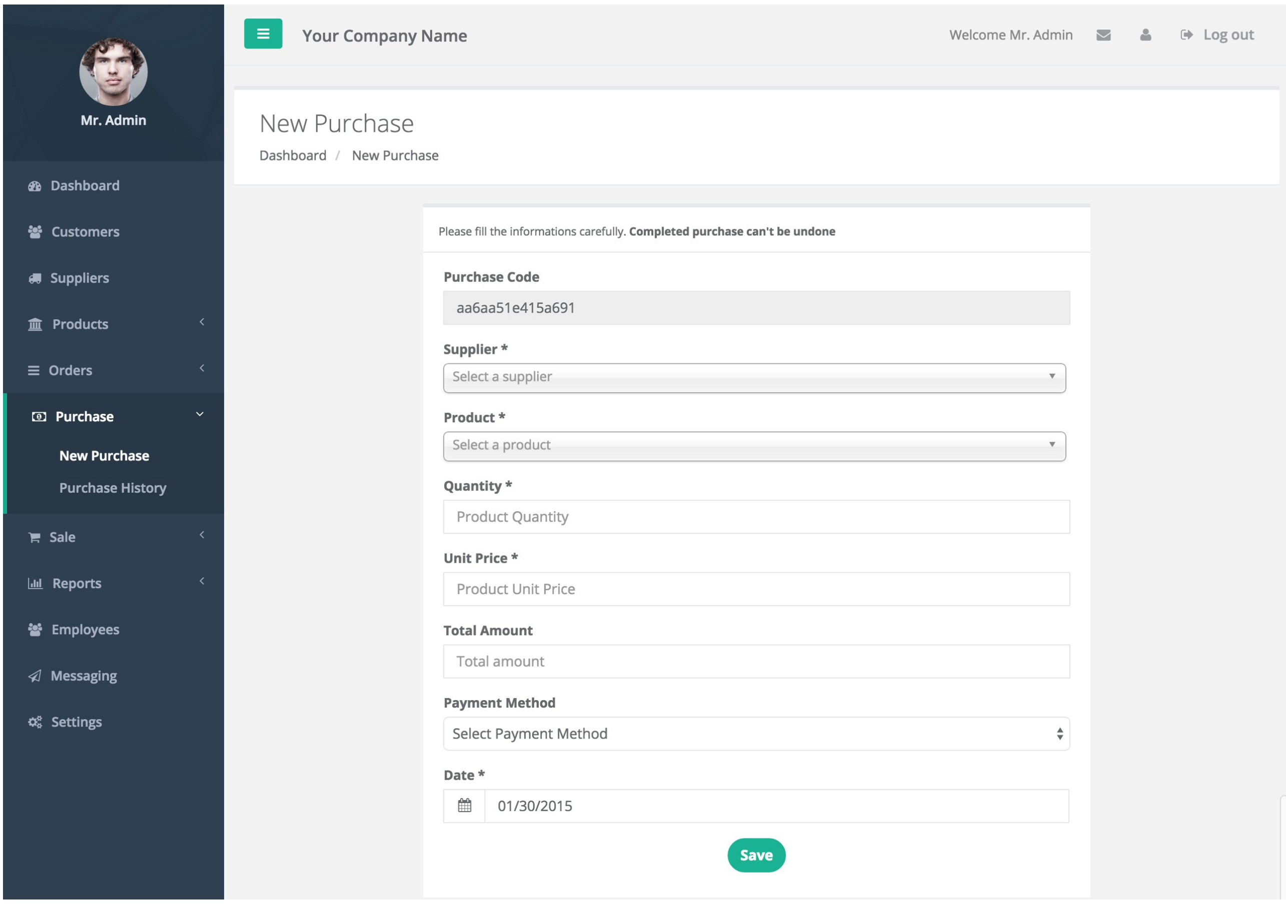
In the order menu, there are three separate pages based on order status as pending, approved and rejected.
The orders as their status are listed in those pages and from there admin can update and also delete any order informations.
On changing the order status, if the admin selects the checkbox in the order editing form named as notify customer, a mail is sent to the customer of that particular order notifying him/her about the update of his order status.

5. PURCHASE

* Create a new purchase of your product
* View purchase history

— *how to create a new purchase?*

From admin navigation panel go to the menu purchase and click new purchase.
Fill the informations and save.



ENTER THE INFORMATIONS CAREFULLY AS THE PURCHASE CAN NOT BE EDITED.

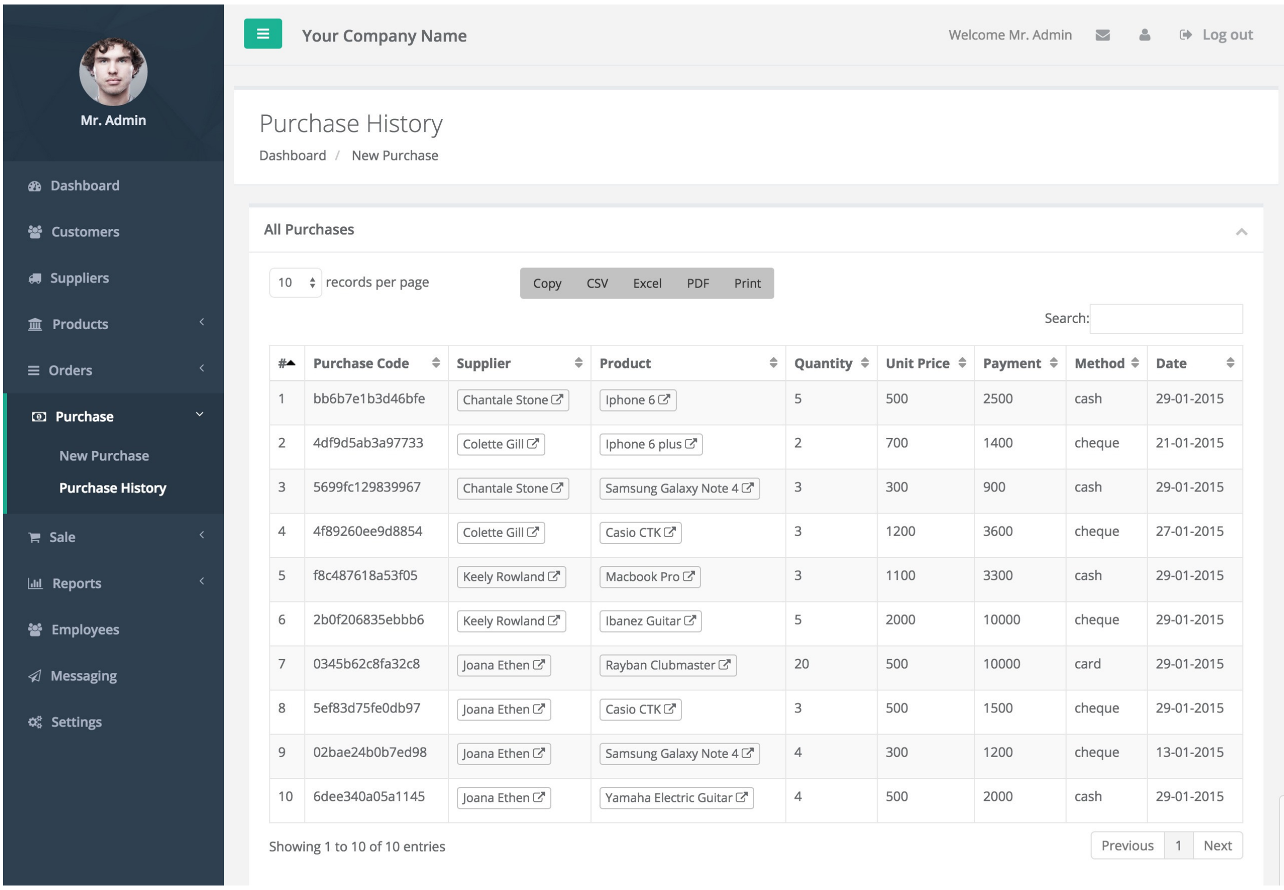
\# Purchase entry does three things.

1. Enters data in purchase informations of database.
2. Enters data in payment informations of database.
3. Updates purchase price and stock quantity of product information.

\# Email is sent to the supplier of the purchase and to the admin.

— *how to view purchase history?*

From the purchase menu go to the page purchase history.
Here table listing of all the purchases that have been made is given with all informations about the purchase.



6. MANAGE SALES

* Create a new sale
* View sales history

NEW SALE

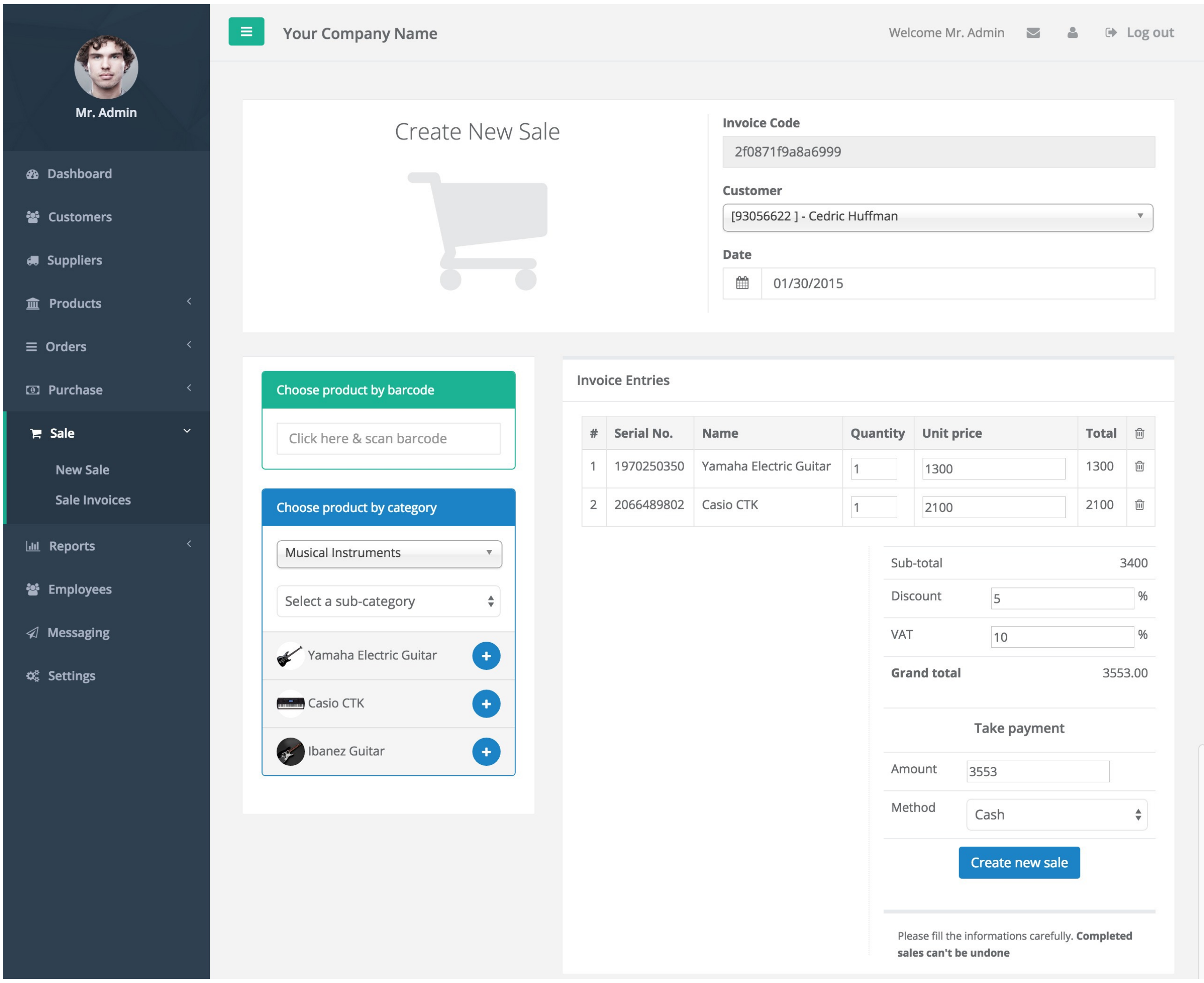
— *how to create a new sale?*

Admin can find sale menu in admin navigation bar.
From the sale menu, go to the new sale page.
On the top right of the page, select customer and the date.
By default the current date is selected.
This is the sale invoice information panel where an invoice code is auto generated.
From the bottom left, choose the product to be sold either by barcode or by product category.

—— *add product to sale list by barcode*
There is a panel named choose product by barcode. Just click on the input box.
Scan the barcode of the product to be sold and thats it.
The product with the informations will be added to the sale invoice form.
Add as many as you want and there is no limit of adding product by scanning barcode.

—— *add product to sale list by category and sub-category*

On choosing a particular category, products of the category will be visible below the panel.
If one expects more specifics, select a sub-category under product category.
That will sort down the product list automatically.
Clicking the plus sign in each product will add the product in the invoice entries. One can add products multiple time and if necessary, can also delete an entry just clicking the trash icon in each entry.



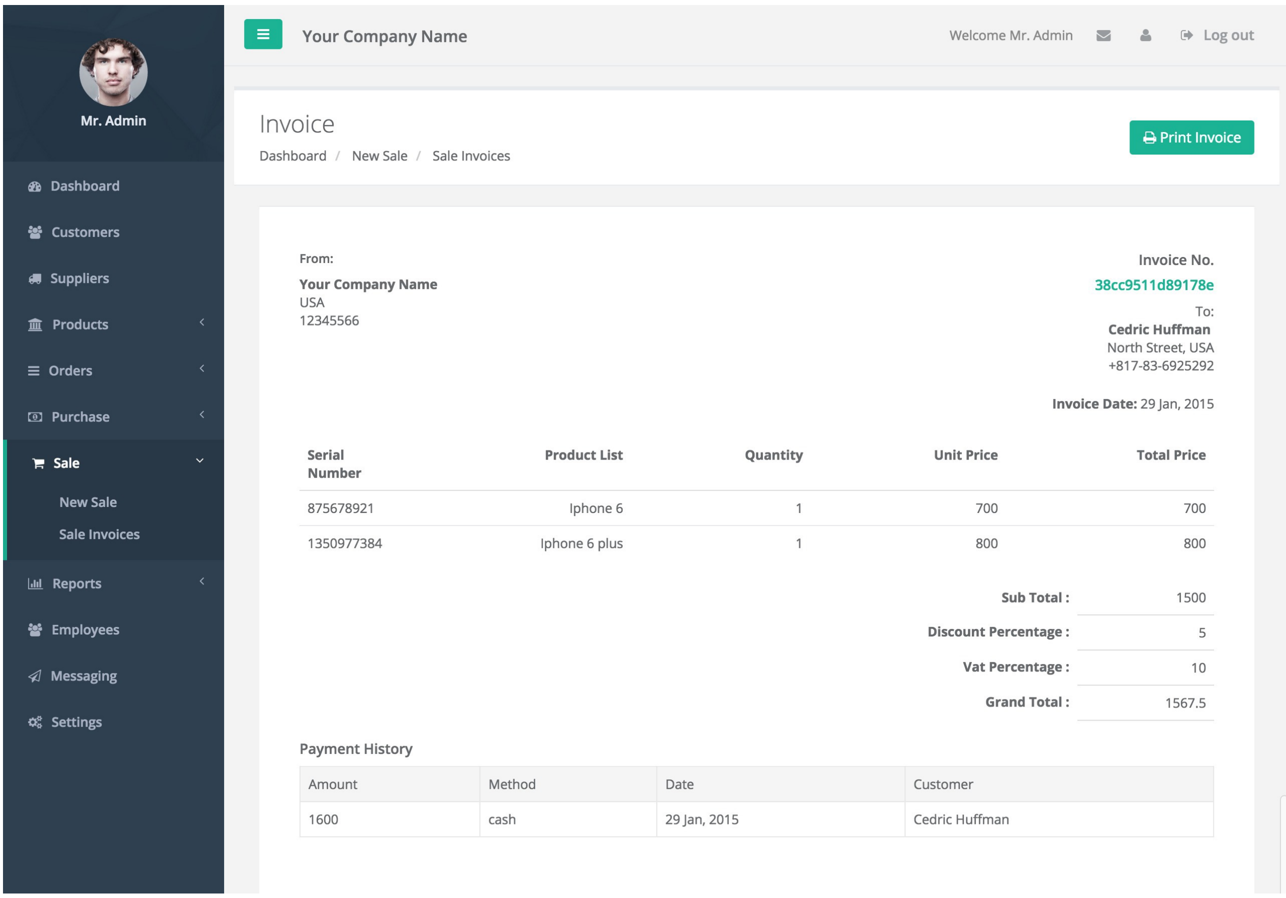
The quantity and the selling price field are editable so after adding a product, one can change the quantity of sale and also the selling price.
If not edited then product quantity is 1 by default and selling price is that one which admin sets while entering the product from product menu.
The summation of sales gives the sub-total and including the TAX and Discounts a grand total is calculated automatically.

TAX and Discount fields are editable. If no value is inserted here then these will automatically come from system settings set by admin.
Click on the button create new sale and the invoice for the sale is created.

SALE INVOICES

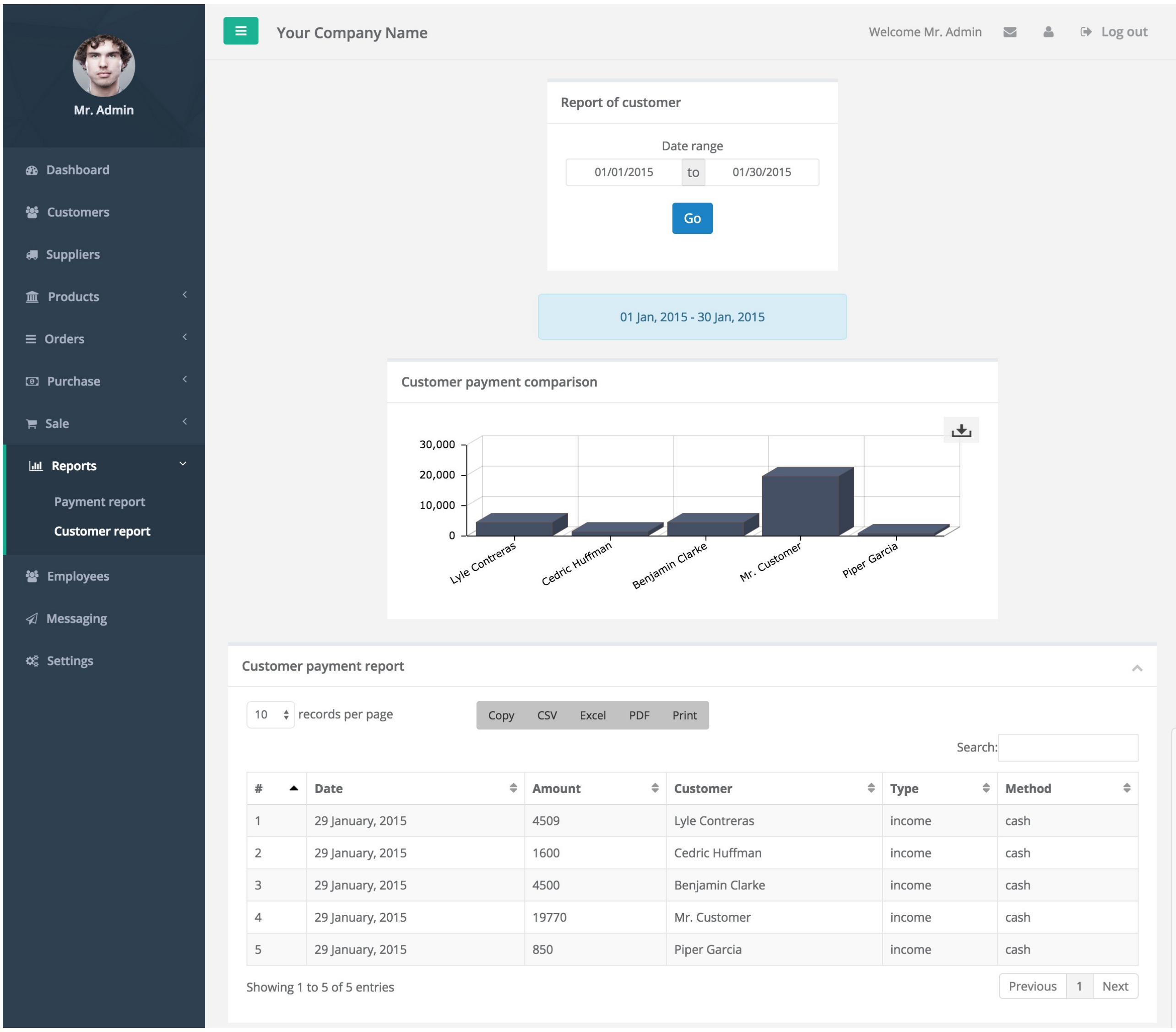
— *how to view the sales and sale invoices?*

Go to the page sale invoices from sale menu of admin navigation panel.
List of all the sales are shown in the table.
Click the view sale invoice button to view the invoice of the sale and the invoice is printable.



7. REPORTS

* Payment report for your company
* Customer payment report.
* Report is represented both by chart and by table format.
* By default the last 30 days report is shown.
* Admin can also select the date range within which he/she wants to see the report of his/her company.



8. EMPLOYEES

* Create new employee as sales staff or purchase staff.
* Browse the profile of each employee with his/her basic informations.
* Edit or delete employee profile.

— *how to create a new employee profile?*

From the admin navigation menu, go to employee page.
Admin can click the add new employee button on the top right of the page.
Fill all the informations and specify the employee belongs to sales or purchase and save.
On creation of the new employee profile, a mail is sent to the employee with his/her profile informations.

— *how to see the profile of employees?*

In employee list of employee page, there is a profile button attached to each one of the employee.
Clicking the button will show employee profile with his/her basic informations.

— *how to edit or delete employee profile?*

Just after the profile button, there are two other buttons named edit and delete.
Clicking the edit button, admin can edit the informations about that employee.
The click on delete button will delete the employee profile.

— *what is the purpose of sales staff and purchase staff?*

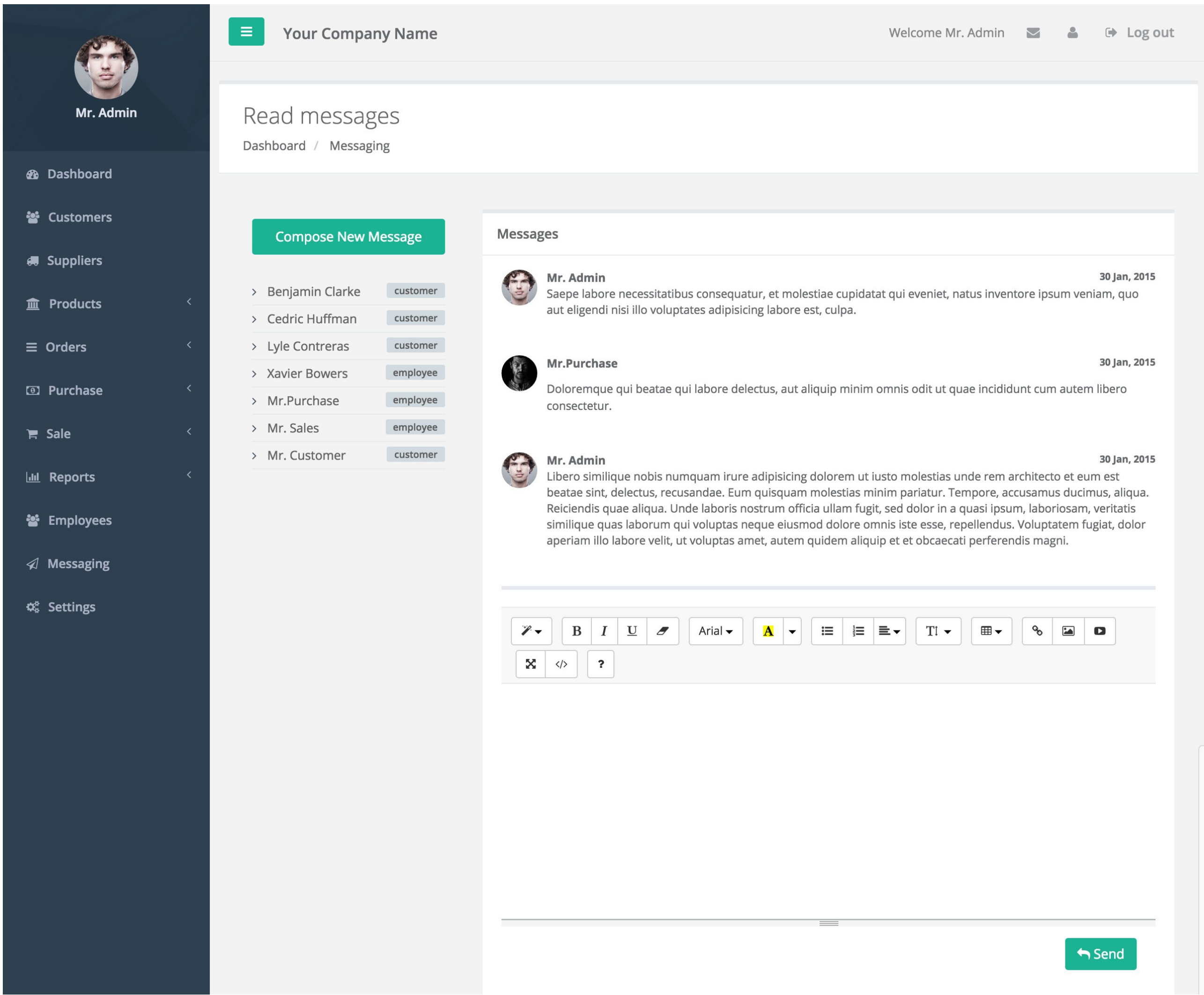
Sales and purchase, both staff will have their login to the system.
Sales staffs will be able to handle only the sales of the company. He/she will have no access to other modules.
Purchase staffs will be able to handle only the purchase of the company. He/she will have no access to other modules.

9. MESSAGING

* Send private message to customers
* Send private message to sales staffs and purchase staffs.
* Receive message replies from employees and customers.
* Reply to their messages.

— *how to send a new message?*

Go to the messaging page from the admin navigation menu.
Click compose new message button.
This will lead you to another page.
Select the user you want to send message.
Write your message and send.

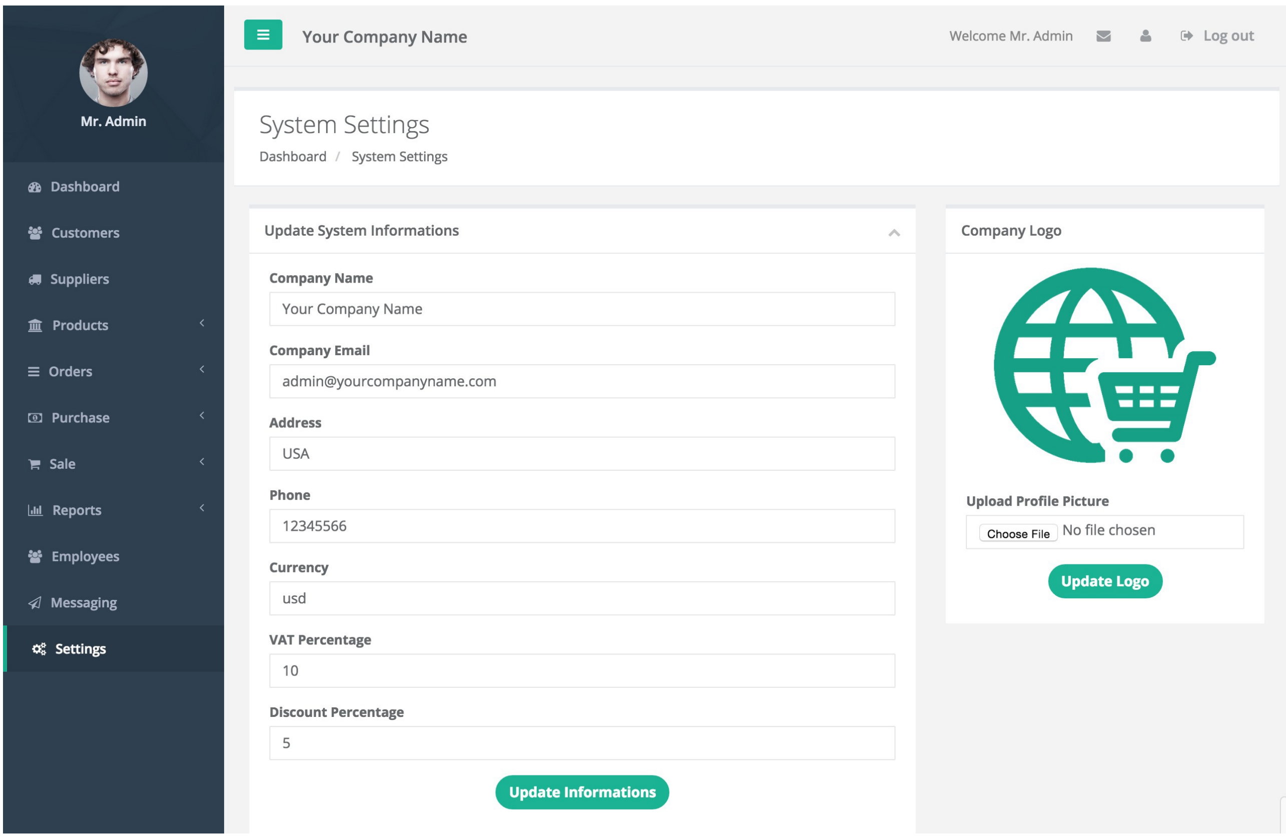


The user you sent message will get a mail notification about this message.

— *where can admin read all the messages?*

When admin send messages to users or users send messages to admins, they will be showing on the left side of messaging page with the sender name and sender type.
Sender type indicates the customer or employee.
Click any one that you want to read.
That will lead to the message reading page where admin can all the messages from that user and also all the messages that admin have send to that particular user.
Admin can reply from this page.
With every message, a mail is sent to the receiver of the message notifying about the message.

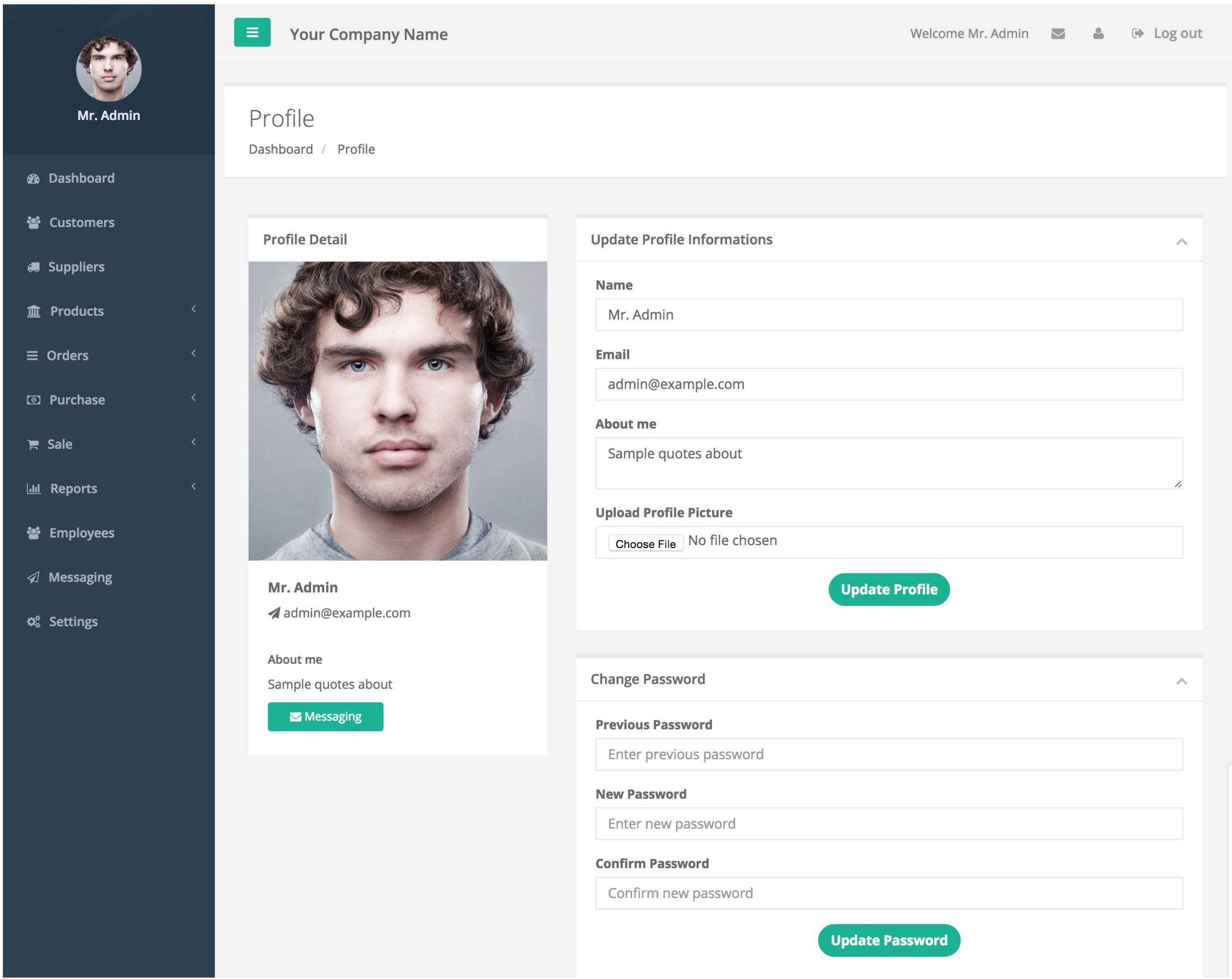
10. SETTINGS



* Update the basic informations about the company.
* Set up the company email from which all the emails mentioned above will go.
* Set the VAT and Discount percentage.
* Upload logo of your company.
* Admin can also access the settings from the user icon on the top right of every page.

11. PROFILE SETTINGS

* Change basic profile informations.
* Update password.
* Upload profile picture.



— *how to access profile settings?*

Click on the name on the top right of navigation menu.
Or click the user icon on the top right to bring the dropdown from where you can get access to profile and also system settings.

Customer Panel

1. Dashboard

* Links to basic pages of customer panel

2. Products

* View table listing of all the products.
* View product details.

3. Orders

* Create order filling up the needed informations.
* Orders are sent to admin for approval.
* When order is approved or rejected, customer will get an email notification.

4. Purchase History

* View all the purchases made by the logged in customer.
* View the invoice of any particular purchase and print them.

5. Private Messaging

* Get all the message sent by admin
* Send the message reply to admin

* Admin will get email notification when customer replies or sends any message and also customer will get email when admin sends message to him/her.

Purchase Staff Panel

1. Dashboard

* Links to basic pages.

2. Purchase

New Purchase

* Create a new purchase filling up all the needed informations.

CHECK AND RECHECK BEFORE SUBMITTING THE PURCHASE BECAUSE THE COMPLETED PURCHASE CAN'T BE UNDONE.

* View the purchase history

3. Private Messaging

* Get all the message sent by admin
* Send the message reply to admin
* Admin will get email notification when staff replies or sends any message and also staff will get email when admin sends message to him/her.

Sales Staff Panel

1. Dashboard

* Links to basic pages.

2. Sale

New Sale

* Please follow the same instructions as for admin.

Sale Invoices

* View a list of all sales
* View sale invoice and print them

3. Private Messaging

* Get all the message sent by admin
* Send the message reply to admin
* Admin will get email notification when staff replies or sends any message and also staff will get email when admin sends message to him/her.