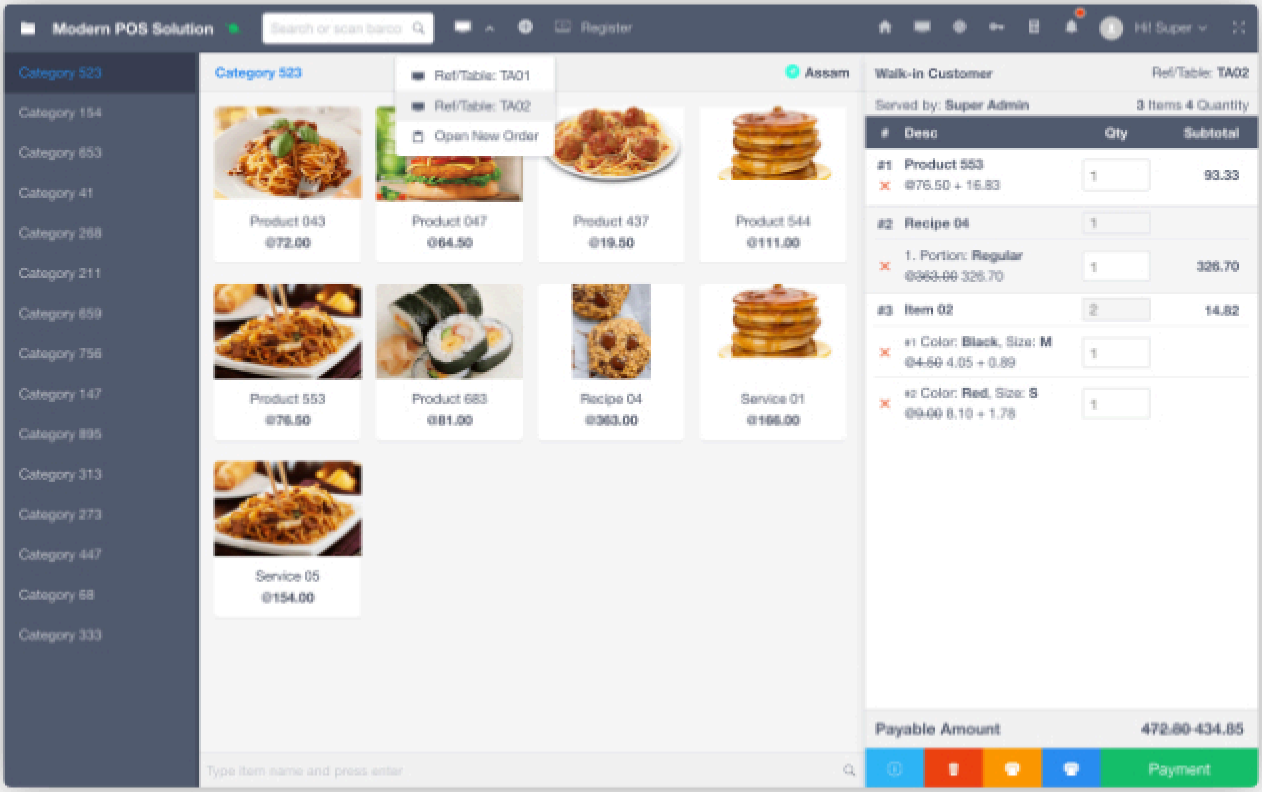
Modern Point of Sale solution Documentation



Welcome to MPS Guide

Modern POS Solution Documentation (version 1.0)

Thank you for purchasing Modern Point of Sale Solution, this is beta, pre-release version.

We have tested the back-end, however the front-end is not yet tested. We have released it to get valued feedback of end users, while we improving the front-end application. These is auto update feature that can be enabled/disabled in settings. It will check for update on your desired time range of selected day. We have tested the auto updater but still there could be chance of trouble. If you have any issue, please do **ask question at support portal**.

This documentation is basic guide and we will be added more sections to it time to time and keep improving these so that you don't have to wait our response but check the documentation to settle any issue or get answer to your question. We appreciate your help, support and patience, it means a lot, encourages us to keep improving the item.

About MPS

Modern POS Solution (**MPS**) is all in once business solution developed by **Tecdiray IT Solutions**. MPS is developed using **Vuejs** (front-end) and **Laravel** (back-end). All licenses come with source code of back-end but the front-end source code is not included in regular license. If you need to modify the item's front-end for yourself or your clients then you will need to purchase standard or extended license.

This item is compatible with most of the tax systems including SST, VAT and state level taxes such as in *Canada* & *India*.

We have tried to make this documentation as comprehensive as we can and will keep update time to time with new details and FAQs. Please read the manual and if you can't find answer of your questions, please ask at **support portal**

Some of the main features of the Modern POS Solution are as following:

- Sales
- Purchases
- Locations
- Quotations
- Gift Cards

- Custom Fields
- Shortcut Keys
- Recurring Sales
- Accounts and Asset Transfers
- Return Order (Sale & Purchase)
- Item Promotions
- Event Calendar
- Expenses & Incomes
- Brands and Categories
- Stock Adjustments & Transfers
- Multiple Taxes per item and order
- Items (Standard, Service, Recipe & Combo)
- Item Units and Modifiers (add-ons)
- Customers, Customer Groups & Suppliers
- Restaurant features like Halls, Tables, Recipes and User Impersonating (easy login)
- Payments module with offline and online payment options
    - Accept PayPal payments
    - Accept Credit Card Payments with any of the following
        - Stripe
        - PayPal Pro
        - PayPal Rest
        - Authorize.net
        - More will added in future (local gateway request should be made with developer account details of the gateway)
- Custom Fields module to add extra fields to
    - Item
    - Payment
    - Location
    - Asset Transfers
    - Income & Expense
    - Customer and Supplier
    - Sale, Delivery & Purchase
    - Quotation and Return Order
    - Stock Adjustment and Transfer
    - Custom Field with sort order & following types
        - Text
        - Number
        - Select
        - Textarea
        - Checkbox
        - Radio
        - Date
        - Date Time
- Enable/disable stock feature (Inventory)
- Easily configure-able with Settings module
- Comes Configure-able User Roles
    1. Super (super admin)

        - Can perform all actions
    2. Customer and Supplier Roles are reserved
    3. Add as many as you want and set permissions as you need
- Reports
    1. Alerts
        - Due Payments
        - Expense Approvals
        - Low Quantity Items
        - Expiring Quantity Items
        - Coming Recurring Sales
        - Customer and Supplier due limit
    2. Account, customer and supplier transactions with opening and closing balance for the selected date range
    3. Items Report
    4. Sales Report
    5. Purchases Report
    6. Payments Report
    7. Incomes Report
    8. Expenses Report
    9. Stock Transfer Report
    10. Stock Adjustment Report
    11. User clock time logs
    12. Activity logs
    13. POS Register Report
    14. You can request more reports at https://github.com/Tecdiary/MPS/discussions/new?category=ideas

- Progressive Web App, you can add it to home on your tablet/mobile devices and use as mobile application. All the get requests will be cached but you need to be online to make post/put/delete requests.

Emails

> **Disabled on demo** - Emails are disabled on demo.

System will send emails as following:

1. **User Created** → User will be informed once created by super
2. **Admin Reset User Password** → User will be informed once password reset by super
3. **Sale Created** → Customer will be informed that sale has been created
4. **Purchase Created** → Supplier will be informed that purchase has been created
5. **Payment Created** → Customer/Supplier will be informed that payment has been created

6. **Payment Received** → Customer will be informed that payment has been received

> **Feedback Required** - We will add more email options as we receive feedback from you.

Report Bug

You can report issues, bugs and errors by opening issue https://github.com/Tecdiary/MPS/issues/new?labels=bug

Please test the issue on live demo before reporting and provide details of the error/bug with steps to reproduce it.

We will be working closely with all of you to resolve the issues/bugs/error as soon as possible. However for feature requests, these will be considered for next update except reports related request.

Demo Details

Link: https://mps.tecdiary.net/

You can select super or staff to login as and try our demo.

Feature Request

Please use the repo discussions to request feature for the future updates.

Support Request

If you can't find answer here in docs, you are suggested to ask question at support portal https://tecdiary.net/support/modern-point-of-sale-solution. Please be patient while accepting our response as it could take 1 - 2 working days to respond.

Partnership/Bulk Licenses

If you are interested in partnership or need bulk license discount, please reach to us by emailing to saleem@tecdiary.com

Credit

Laravel → The PHP Framework For Web Artisans.

Vue.js → The Progressive JavaScript Framework.

View UI → View UI (view-design), the original iView, is a set of open source UI component libraries based on Vue.js.

PHP Packages

```
academe/omnipay-authorizenetapi
bnbwebexpertise/laravel-attachments
composer/composer
doctrine/dbal
fideloper/proxy
fruitcake/laravel-cors
guzzlehttp/guzzle
laravel/framework
laravel/legacy-factories
laravel/tinker
league/omnipay
maatwebsite/excel
menarasolutions/geographer-laravel
moneyphp/money
morrislaptop/laravel-queue-clear
nesk/puphpeteer
nwidart/laravel-modules
omnipay/paypal
omnipay/stripe
predis/predis
ramsey/uuid
```

```
robinvdvleuten/ulid
spatie/laravel-activitylog
spatie/laravel-backup
spatie/laravel-medialibrary
spatie/laravel-permission
spatie/laravel-ray
spatie/laravel-schemaless-attributes
spatie/laravel-sluggable

// dev Packages
barryvdh/laravel-debugbar
brianium/paratest
facade/ignition
fzaninotto/faker
laravel/ui
mockery/mockery
nunomaduro/collision
orchestra/testbench
phpunit/phpunit
```

NPM Packages

```
@nesk/puphpeteer
fabric
inflection
object-to-formdata
qrcode-generator
ulid
uuid
v-hotkey
view-design
vue-barcode
vue-native-websocket
vue-stripe-checkout
vue2-touch-events
workbox-cli

// dev packages
babeljs
accounting
animate.css
archiver
axios
```

```
cross-env
electron-icon-builder
highcharts
jest
laravel-mix
less
lodash
moment
sass
rimraf
vue
vue-i18n
vue-router
vuex
workbox-cli
```

Thanks to all great organizations/people who are developing open source software.

We will donate 10% - 15% of each license amount to sponsor open source work. I know that is not good amount but we will increase it as we have more money.

Installation Guide

We have added the installer for easy installation experience and it can be accessed by adding `/install` at the end url.

> **Installation Difficulty?** - Laravel installation might be tricky for some users. It will be fine as long as you know how to set domain/subdomain root path or have performed Laravel installation before.

Step 1: Preparation

Please upload all the extracted files and folder to your server. Your folder will have these folders & files

```
UploadFolder
        ├── app
        ├── bootstrap
        ├── config
        ├── database
        ├── modules
        ├── packages
        ├── public
        ├── resources
        ├── routes
        ├── storage
        ├── tests
        ├── vendor
        ├── .gitignore
        ├── .htaccess
        ├── artisan
        ├── composer.json
        ├── composer.lock
        └── server.php
        └── webpack.mix.js
```

Open the folder in command line/terminal and run `npm install` This required nodejs to be installed on your server.

> **Developer License?** - If you have purchased developer license, please run install dependencies before following these steps by running `composer install`

> **Set correct root path** - You need to set the root path for domain/subdomain to `public` directory inside MPS download/extracted files.

You can access the installer by added `/install` at the end of your domain i.e,

`https:` // `yourdomain.com` / `install` for main domain installation `https:` // `yourdomain.com` / `subfolder` / `install` for sub directory installation `https:` // `subdomain.yourdomain.com` / `install` for sub domain directory installation

You will need to prepare these details (mentioned at installer page)

1. License details:
    - Purchased by (**username**/email)
    - Licence Key / Purchase code
2. Database server details:
    - Database Hostname
    - Database Name
    - Database Username
    - Database Password `User must have all the privileges on the database`

Step 2: Licence Agreement

Please read the license details and accept.

Step 3: Pre-Install Checklist

If there is any server config change required, you will see the details on this page. You need to resolve these before proceeding to next step. If you are not sure about any issue, simply Google it or check with your host/server administrator.

Step 4: Verify your License

Please fill `username` and `license key`/`purchase code` and click next to verify, if you set error, please double check your purchase details and try again. It still same, please email to support@tecdiary.com with your `license key`/`purchase code`, we will check and update you.

Step 5: Installation Configuration

Please fill the form with your database server details `hostname`, `database`, `username` and `password`. Please make sure that

- database is empty
- the `hostname` is correct
- user has all the privileges on the database

Step 6: Create User Account

Please fill the form to create super user account.

Step 7: Finalize Installation

We are almost done, it's time to finalize the installation. If you need some demo data, you can generate from this page before pressing the **Finalize** button.

You must press the `Finalize` installation button to complete the installation.

Step 8: Setup Cron job

Please setup cron job for

```
* * * * * cd /path/to/UploadFolder && php artisan schedule:run >> /dev/null 2>&1
```

It's okay to run the schedule every minute as it won't run if there is no task. But if you don't want then you can set to run once/twice an hour.

Step 9: Add required application data

Please login to app and add following data

1. Add Account
2. Add Location
3. Add Category
4. Add Customer
5. Update Settings
    - App Settings
    - Mail Settings
    - Payment Settings
    - Scale Barcode Settings
    - Upload default application Logo

> **PDF Attachment** - MPS used `rialto-php/puphpeteer` to generate pdf files, please install npn packages by running `npm install` or install `npm install @nesk/puphpeteer` in your main directory.

> ***Can I start again?*** *- Yes, if there is any issue on any step and you can't pass then you can cancel and start over again with new database or settings. If you want to use the same database, please make sure it's empty. If there are any tables, you can drop them.*

Installation Service

We recommend that you perform installation as mentioned in this guide yourself.

In case you want to request installation service, please open support ticket for installation request. It will cost you $40

Please don't forget to provide all the details such as `License Key`/`Purchase Code`, `Server Details` (access to files and database) with login credentials and desired path to install the item. We will required 1 working day to complete the installation. Once done, you will be replied with all the details to get you started with your new business application.

In case we have any server configuration issue, we might need to work with your host/server admin to resolve it and this time doesn't count in the installation deadline.

If you have any question or require further information, you should ask support question at support portal

General Guide

General

Modern POS Solution is designed & developed to for small to enterprise business needs. We have tried to keep design and layout simple so that everyone can easily get going. The design is responsive and we have added the progressive web app feature to it. MPS look quite fine on all screen sizes.

You can have the option to use sidebar as collapsed (mini sidebar, menu will popup on right).

All the tables are search-able & sort-able with responsive styles, on the small screens, you can scroll right to see data and actions menu.

Dashboard

Dashboard has last 7 days, monthly and yearly charts with month and year selection.

We would like to listen your feedback to improve and make dashboard more informative.

Calendar / Events

Calendar UI is simple & easy, you can add events and they will mark a dot on calendar. User will get email notification before 2 days and 1 day of the event.

App Alerts

Alerts (bell icon on top bar) will display alerts for app notifications, expenses to approve, payments, low stock, expiring soon stock, coming recurring sales, customer & supplier due limit.

Gift Cards

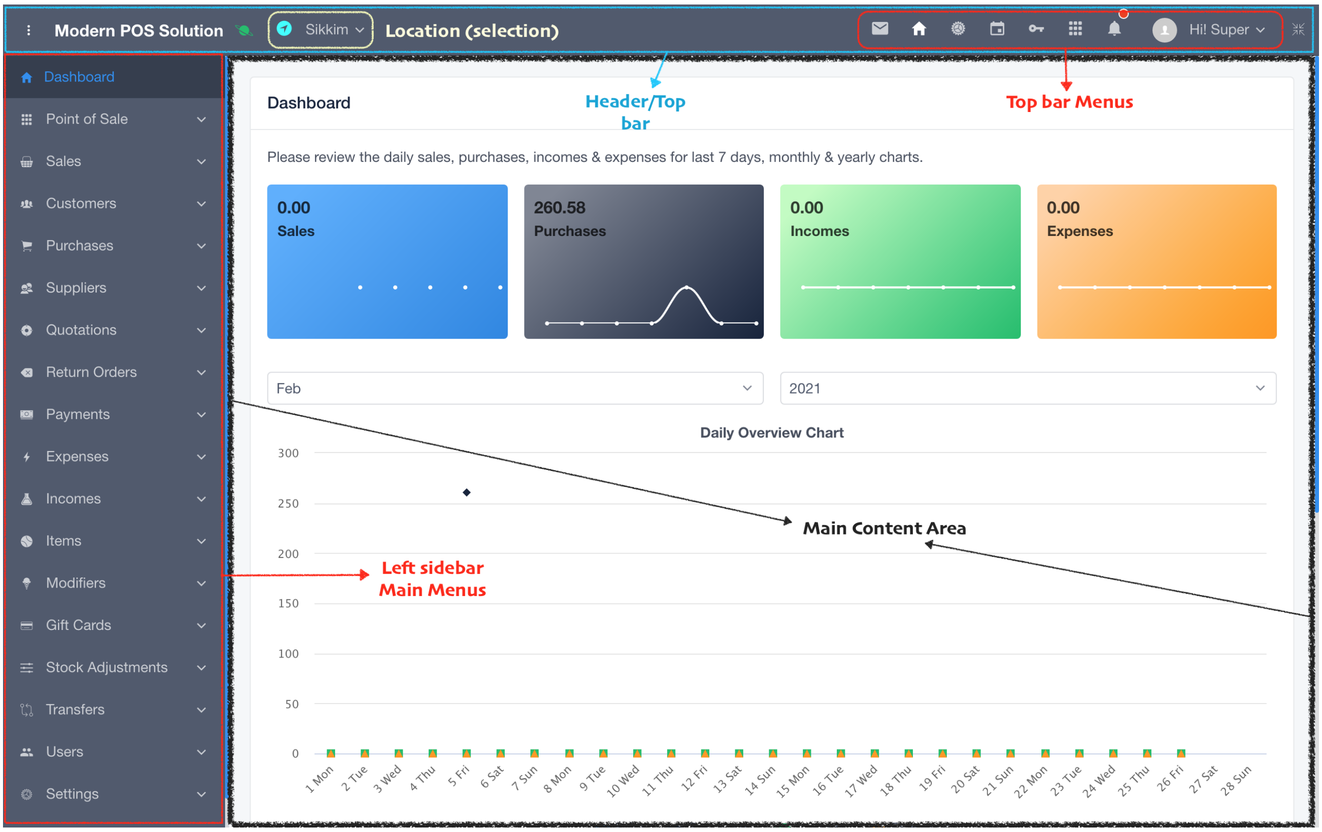
MPS comes with gift card feature, you can add and accept payments by gift cards. It's keep log for the gift cards.

Activity Logs

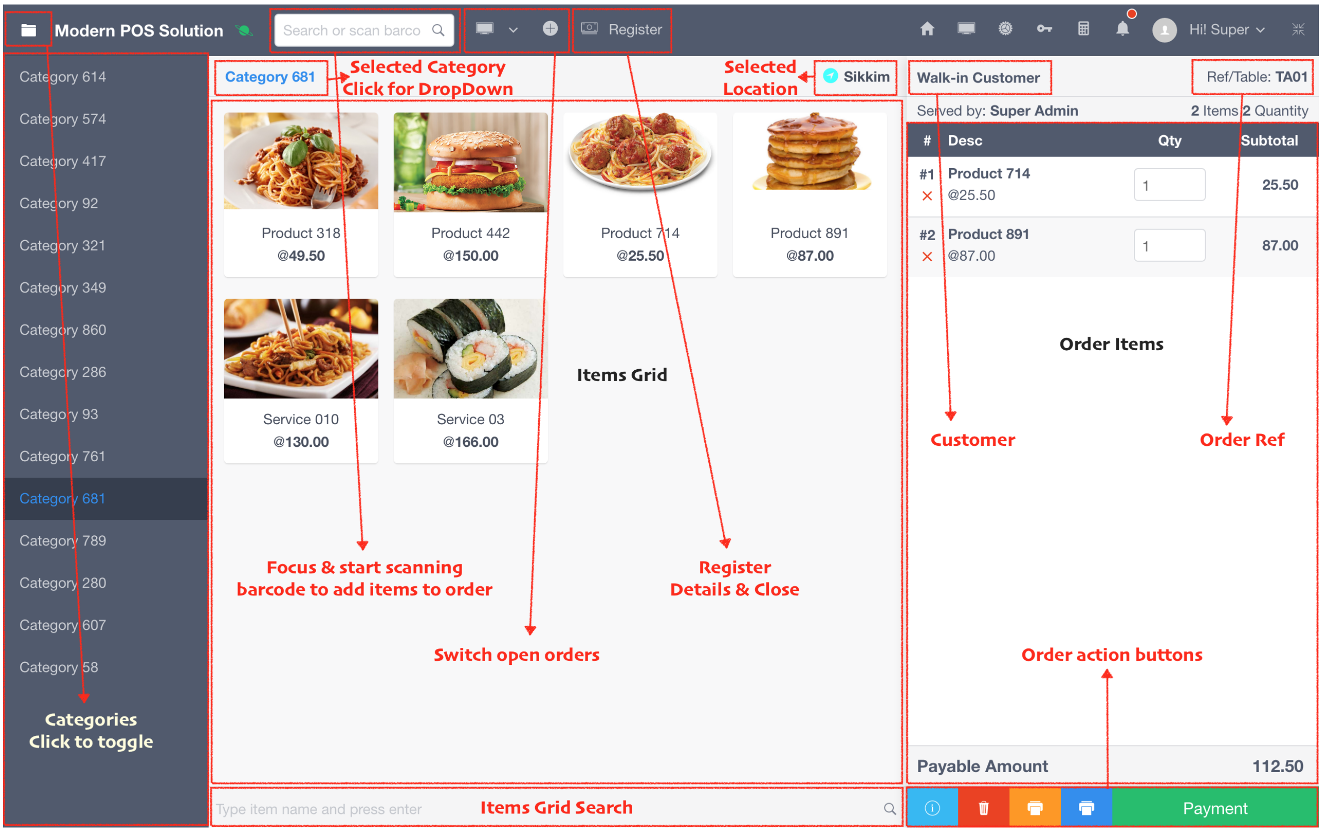
MPS will automatically logs all the activity in your app and you can view it under reports. The activity table is search-able (log name & description).

Design

Application Screen Sections



Point of Sale (POS) Screen Design



Auto Update

MPS comes with auto update functionality, please enable it in system settings.

Support

Just remember, we're always a question away if you need help.

Point of Sale

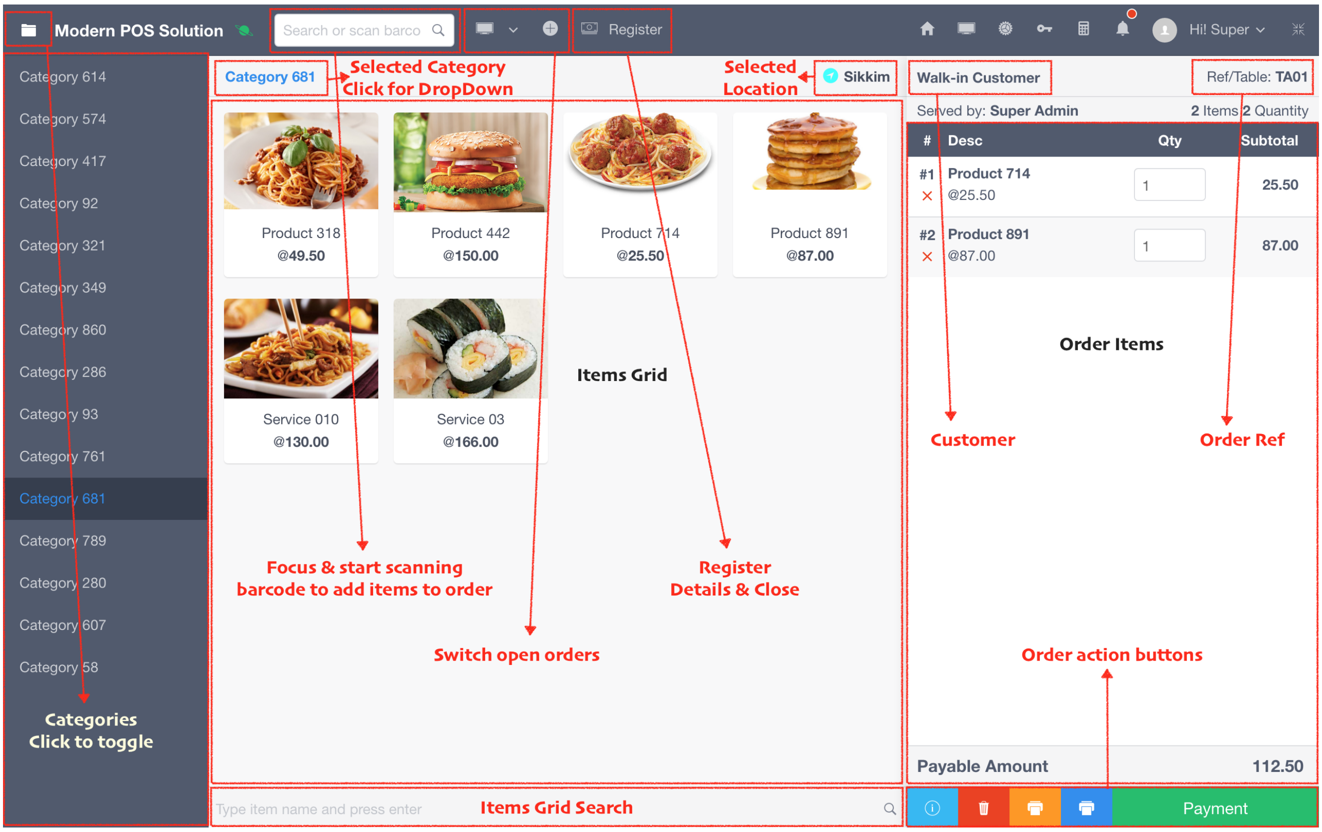
POS Highlights

POS Screen has many options to make the sales procedure a breeze.

The main features are as follows

1. Register details (all the pos sales)
2. Categories (side bar and cascade)
3. Multiple open order and switch with a click
4. Shortcut keys to easy manage/perform any task
5. Grid item can be search regardless of the selected category
6. Order items sections where any item name can be clicked to open edit modal
7. POS action buttons with order info/form, delete current order, print order and bill and payment button to finalize the sale
8. You can accept payment by any enabled method. Amount buttons can be chosen in the settings
9. POS has option to send print using browser or POS Print Server (if enable Print using POS Print Server)
10. If you have added the sale, the button will be added to the actions to print previous sale, otherwise you can go to list sale to print receipt for any sale
11. Enable restaurant feature to get the hall, tables to open orders. If the table has already open order pos will display it so that there is no way yo open multiple orders for a single table
12. Enable impersonation to easy switch users with QRCode. The user dropdown will display the impersonated user and the logged in user details

POS Design



Support

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Sales & Deliveries

Sales

Sales page has Date, Reference, Customer, Draft, Paid, Void, Grand Total, Attachments, Created at, Created by, Total, Item Tax, Order Tax, discount, Shipping, Custom Fields, Details and Actions columns. You can view, add payment, view payment, add delivery, view delivery, email, duplicate, edit and delete any sale. The sales table can be sorted for date and reference and searched/filtered for date, reference, customer and others.

The add sale page has the following fields

1. Type
2. Date
3. Reference
4. Customer
5. Order Taxes
6. Shipping Fee
7. discount
8. Order products - you can search products or scan barcode
9. Custom Fields
10. Attachments
11. Details
12. Draft - if sale is still a draft
13. Auto create payment for the sale

Once you unchecked the draft, the sale will be finalized and the grand total amount will be added to the customer balance and sync stock (if enable in settings). If the add payment was checked, the payment will be added and customer will be notified about the new sale and payment request.

Deliveries

You can add delivery for any sale from sale's actions menu and those will be listed on list deliveries page. You can view & print the delivery and edit it to update the status.

Recurring Sales

Recurring sales can be added for daily, weekly, monthly, quarterly, semiannually, annually, biennially and triennially. System will automatically add sale for the recurring sale once start date reached (first time) or date (if create before set) for all active recurring sales along with payment. The list recurring sales table can be sorted for date and reference and searched/filtered for date, reference, and customer.

> **Require Cron Job Setup** - Recurring sales require you to setup cron job to run at least once daily. You can add cron job for
> `* * * * * cd /path/to/mps && php artisan schedule:run >> /dev/null 2>&1`

Support

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Purchases, Quotations & Returns

Purchases

Purchases page has Date, Reference, Supplier, Draft, Paid, Void, Grand Total, Attachments, Created at, Created by, Total, Item Tax, Order Tax, discount, Shipping, Custom Fields, Details and Actions columns. You can view, add payment, view payment, email, duplicate, edit and delete any purchase. The purchases table can be sorted for date and reference and searched/filtered for date, reference, supplier and others.

The add purchase page has the following fields

1. Date
2. Supplier
3. Reference
4. Order Taxes
5. Shipping Fee
6. discount
7. Order products - you can search products or scan barcode
8. Custom Fields
9. Attachments
10. Details
11. Draft - if purchase is still a draft
12. Auto create payment for the purchase

Once you unchecked the draft, the purchase will be finalized and the grand total amount will be added to the supplier balance and sync stock (if enable in settings). If the add payment was checked, the payment will be added and supplier will be notified about the purchase and payment request.

Quotations

Quotations page has Date, Reference, Customer, Grand Total, Attachments, Created at, Created by, Total, Item Tax, Order Tax, discount, Shipping, Custom Fields, Details and Actions columns. You can view, email, create sale, edit and delete any quotation. The quotations table can be sorted for date and reference and searched/filtered for date, reference, supplier and others.

The add quotation page has the following fields

1. Date

2. Customer
3. Reference
4. Order Taxes
5. Shipping Fee
6. discount
7. Order products - you can search products or scan barcode
8. Custom Fields
9. Attachments
10. Details

You can create sale for any quotation from actions menu.

Return orders

Return orders page has Date, Reference, Customer, Grand Total, Attachments, Created at, Created by, Total, Item Tax, Order Tax, discount, Shipping, Custom Fields, Details and Actions columns. You can view, email, create sale, edit and delete any return order. The return orders table can be sorted for date and reference and searched/filtered for date, reference, supplier and others.

The add return order page has the following fields

1. Type
2. Date
3. Reference
4. Customer/Supplier
5. Order Taxes
6. Shipping Fee
7. discount
8. Order products - you can search products or scan barcode
9. Custom Fields
10. Attachments
11. Details
12. Create payment for the order
13. Deduct amount from cash register

You can add return for any sale or purchase (select type). If selected create payment, the grand total amount will be added to the customer/supplier balance. If selected deduct amount from cash register, system will remove the amount from cash register. The stock will be automatically synchronized depending on your stock settings.

Payments

Payments

Payments page has Created at, Reference, Amount, Attachments, Gateway, Created for, Created by, Received, Details and Actions columns. You can view, email, edit and delete any payment. The payments table can be sorted for date and reference and searched/filtered for date, reference, account, created for and others.

The add payment page has the following fields

1. Type
2. Customer/Supplier
3. Reference
4. Account
5. Amount
6. Gateway
7. Attachments
8. Details

The type can be customer or supplier and then choose the selected data. System will automatically credit/debit the amount to account and customer/supplier. Payment notification will be sent too.

Support

Just remember, we’re always a question away if you need help.

Customers & Suppliers

Customers & Suppliers

Customers & suppliers are quite similar, the customers are attached to sales & quotations while suppliers are attached to purchases. Customer & suppliers are essential part of any business. There are few informational fields such as

1. Name,
2. Company,
3. Opening balance,
4. Phone,
5. Email,
6. due limit,
7. Customer group,
8. Address,
9. Country
10. State
11. Custom Fields

The `Name` and `State` (if enabled in settings) are required. If you need to save more data for customers & suppliers, you can add custom fields for them and those will be added to forms same as added to other models.

Customers/Suppliers Transactions

MPS maintain separate journal for each customer/supplier and you can view the transactions for any customer/supplier from listing page.

Support

Just remember, we’re always a question away if you need help.

Expenses & Incomes

Expenses

Expenses are any costs incurred in the ordinary course of business. Business expenses are deductible and are always netted against business income.

Money spent or cost incurred in an organization's efforts to generate revenue, representing the cost of doing business. Expenses may be in the form of actual cash payments (such as wages and salaries), a computed expired portion (depreciation) of an asset, or an amount taken out of earnings (such as bad debts).

Expenses are deduction to your account and are not purchases. Expenses can be

- Labor
- Insurance
- Operating expenses
- Rent, utilities, and phones
- Office equipment and supplies
- Fees, dues, and subscriptions
- Advertising, marketing and promotion
- Benefits, continuing education or training

Expenses have the follow field by default and

1. **Date** - Expense date
2. **Title** - Title for the expense
3. **Amount** - Expense amount
4. **Reference** - Reference must be unique
5. **Account** - Account to add expense
6. **Category** - Expense category
7. **Custom Fields** - Any custom fields added by you for expenses
8. **Attachments** - Details of the expense
9. **Details** - Details of the expense
10. **Recurring Expense** - Details of the expense

If the user is not super admin, he will need to select user for approval of expense and that user will have alert for the expense he need to approve.

Incomes

Incomes are any income realized as a result of business activity. Business income is a type of earned income and is classified as ordinary income for tax purposes. Sale of product and services should be added by the sales not income as these are for any other business incomes. The flow of cash or cash-equivalents received from work (wage or salary), capital (interest or profit), land (rent), investment, royalties, etc.

For example, fees received by a person from the regular practice of a profession are business income. Rents received by a business/person in the real estate business are business income. A business must include in income payments received in the form of property or services at the fair market value of the property or services.

Incomes have the follow field by default and

1. **Date** - Income date
2. **Title** - Title for the income
3. **Amount** - Income amount
4. **Reference** - Reference must be unique
5. **Account** - Account to add income
6. **Category** - Income category
7. **Custom Fields** - Any custom fields added by you for incomes
8. **Attachments** - Details of the income
9. **Details** - Details of the income

Others

There is no option to attached taxes to the expenses and incomes but if it's useful for business, we will add taxes to them after your feedback.

Support

Just remember, we’re always a question away if you need help.

Items & Modifiers

Items

Items - In marketing, a item/product is an object or system made available for consumer use; it is anything that can be offered to a market to satisfy the desire or need of a customer. In retailing, products are often referred to as merchandise, and in manufacturing, products are bought as raw materials and then sold as finished goods. A service is also regarded to as a type of product.

A product can be classified as tangible or intangible. A tangible product is a physical object that can be perceived by touch such as a building, vehicle, gadget, or clothing. An intangible product is a product that can only be perceived indirectly such as an insurance policy. Services can be broadly classified under intangible products which can be durable or non durable.

MPS (Modern POS Solution) as these type of items

1. **Standard** - Standard items can be any products with any unit of measure, variants and serials, these can be manufactured and stocked.
2. **Service** - Service items can be any services offered by business such as support or repairing etc, these are not manufactured, transported or stocked.
3. **Combo Deal** - Combo deals as name suggest is combination of items from standard, service and/or recipe items.
4. **Recipe** - Recipe items are sued fo restaurants. You need to enable restaurant features in settings to get this menu.

Standard items

These are the main products those can have variations and serials. Add section has 4 following steps

1. **General** - for general item info such as name, code/barcode, category, cost, price, unit, brand, taxes, photo, summary, details etc
2. **Variants** - For item variant like color and size, add option with name Color and option `Red|Green|Blue` etc. Options are separated with pipe '|'. This page has option to generate all possible combinations of variations.
3. **Location** - If you wish to set different price, cost, quantity and rack for the item
4. **Serials** - If you item has serials, you can set those for the item quantity

Add item form looks complex but if your item don't have the variants, serials and you don't need different price for locations, you can just fill the general data and save the item. Item can be edited anytime, to add these details as you need. We suggest to avoid changing the quantity directly and add adjustment etc but if you need you have the option.

Service items

Service item form is same as of standard the only different is this has no steps but general service data form only with name, code/barcode, category, cost, price, taxes, photo, summary, details etc

Combo deal items

Combo deal form has 2 steps

1. **General** - for general item info such as name, code/barcode, category, taxes, photo, summary, details etc
2. **Combo Items** - This step has main option for portions such as regular or large. You can add essentials items to the portion and have option to add choose-able items, you can add group like drink and desert and add items to it that will be choose-able while adding order for the item. There are field for cost and price of the portion. The cost will be predicted from the sum of essentials items' cost and the single max cost item of each choose-able group.

Recipe items

This menu will only available, if you have enable the restaurant features in settings.

Combo deal form has 2 steps

1. **General** - for general item info such as name, code/barcode, category, taxes, photo, summary, details etc
2. **Variations** - This step has main option for portions such as regular or large. You can add items (ingredients) to the portion. There are field for cost and price of the portion. The cost will be predicted from the sum of items' cost.

Modifiers

Modifiers are something like add-ons to items while order. You can add modifier from main menu and then select those while adding item. Modifier can have item selection where you can add items and those will be selectable while adding the order for main item.

If this part seems complex to you, let us know on support for so that we can guide. If you have better idea on handling these, please do let us know too.

Stock Adjustments

Stock Adjustments

Stock/Inventory Adjustment is used to synchronize the stock to account for things that occur outside the normal business like theft, breakages, spillages, faulty or damaged goods, data entry error etc. Stock Adjustment functionality allows you to modify the stock of items and indicate the reason for that adjustment.

Stock Adjustment page has Date, Reference, Type, Total, Attachments, Created by, Draft, Custom Fields, Details, Created at and Actions columns. You can view, edit and delete any adjustment. The inventory adjustments table can be sorted for date, reference, type and searched/filtered for date, reference, type and created by.

The add adjustment page has the following fields

1. Date
2. Type
3. Reference
4. Adjustment products - you can search products or scan barcode
5. Custom Fields
6. Attachments
7. Details
8. Draft - if transfer is still a draft

Once you unchecked the draft, the transfer will be finalized and the stock will be synchronized.

Support

Just remember, we’re always a question away if you need help.

Asset & Stock Transfers

Account/Asset Transfers

Asset/Money transfers page has Created at, Reference, Amount, To Account, From Account, Created by, Details and Actions columns. You can edit and delete any transfer. The transfers table can be sorted for created at and reference and searched/filtered for created at, reference, account and others.

The account has following fields

1. **From Account** - Name of the from account
2. **To Account** - Name of the beneficiary/destination account
3. **Reference** - Transfer reference, leave blank let system generate
4. **Amount** - Amount of the transfer
5. **Details** - Any further details of the transfer

Stock Transfers

Stock/Inventory transfers page has Created at, Reference, To Location, From Location, Attachments, Created by, Details and Actions columns. You can view, edit and delete any transfer. The inventory transfers table can be sorted for created at and reference and searched/filtered for created at, reference, location and others.

The stock transfer has following fields

1. **Date** - Date of the transfer
2. **From Location** - Name of the from location
3. **To Location** - Name of the beneficiary/destination location
4. **Status** - Transfer status, pending, transferring or transferred
5. **Reference** - Transfer reference, leave blank let system generate
6. **Transfer items** - You can search items or scan barcode
7. **Attachments** - Any documents to attach
8. **Details** - Any further details of the transfer

Support

Just remember, we’re always a question away if you need help.

Users, Roles & Salaries

Users/Employees

Users page has Name, Username, Email, Active, Roles, Default location, allowed locations, Date of Birth, Date of Hire, Salary, Hourly Rate, Commission Rate, Commission Method, Address, Clock in option, User Permissions, If Required to change password and Actions columns. You can view time clock logs, view salaries, edit and delete any user. The users table can be sorted for name, username, email and active and searched/filtered for name, username, email and others.

The user form has following fields

1. **Name**
2. **Phone**
3. **Email**
4. **Username**
5. **Default Location** - will be auto selected on login
6. **Locations** - all allowed locations
7. **Auto clock in** - with login or open pos register
8. **Date of Birth**
9. **Employee Number**
10. **Date of Hire**
11. **Salary**
12. **Hourly Rate**
13. **Commission Rate**
14. **Address**
15. **Documents** - file name and select the file
16. **Password with confirmation**
17. **Roles** - can have multiple roles
18. **Active** - if the user is active and can login
19. **view all records** - can view all records included added by others
20. **Edit others records**- can edit all records included added by others
21. **Allow bulk actions** - can perform bulk actions, mean can select multiple records and delete (if has permission) etc
22. **force password change** - force user to change password on next login
23. **can be impersonated on POS** - this user can login with QRCode on POS

User Roles

MPS has option to add user roles and set permissions for the roles as you like. Super admin role is not change-able. Please be very careful while setting permissions for customer and suppliers group as they are not part of the organization. You only need name to add a user role. The list user roles page has Created at, Role name and Actions menu. You can set permissions, edit and delete any role.

The permissions page is quite simple with all permissions as checkboxes. You check all the required permissions for the role and save.

User Salaries

Salaries page has Date, Created at, Amount, Advance, Type, Status, User, Account, Details and Actions columns. You can view, edit and delete any salary. The salaries table can be sorted for date, created at, amount, advance, type and status and searched/filtered for user, account and details.

You should setup cron job to automatically calculate user salary on start of month. If your don't have salary, it will be calculated for the hourly rate, otherwise the salary amount will be added after deducting any advance salary (if any). You can add advance salary for any user and it will be settled in the next salary.

The salaries form has following fields

1. **Date**
2. **Reference**
3. **User** - salary will be added for this user
4. **Account** - salary will be deducted from this account
5. **Amount**
6. **Type** - salary or commission payment
7. **Status** - paid or due
8. **Attachments** - add attachments if needed
9. **Details** - further details for the salary
10. **If this is Advance Salary** - this is advance payment and shall be deducted from next salary

List salaries page has button to generate salaries for all the users.

Support

Just remember, we’re always a question away if you need help.

Settings

Settings Menu

Settings menu has the following sub menus

1. **Application Settings**
2. **Item Label Design**
3. **List & Add Accounts**
4. **List & Add Locations**
5. **List & Add Promotions**
6. **List & Add Brands**
7. **List & Add Categories**
8. **List & Add Taxes**
9. **List & Add Custom Fields**
10. **List & Add Customer Groups**
11. **List & Add Halls & Tables**
12. **List & Add UOM (Unit of measurements)**

Application Settings

Modern Point of Sale Solution has settings form to easy update application settings.

The applications settings form has the following fields

1. **App Name**
2. **Short Name**
3. **Company**
4. **Registration Number**
5. **Default Account**
6. **Default Category**
7. **Default Customer**
8. **App Timezone**
9. **User Locale**
10. **Inventory Accounting**
11. **Max Discount**
12. **Search Delay**
13. **Email**
14. **Phone**

15. **Address**
16. **Country**
17. **State**
18. **Reference Format**
19. **Overselling**
20. **Receipt Header**
21. **Receipt Footer**
22. **Loyalty/Award Points**
23. **Quick Cash Values**
24. **Dimension Unit**
25. **Weight Unit**
26. **Theme**
27. **Loader Animation**
28. **Delete Confirmation**
29. **Decimals**
30. **Quantity Decimals**
31. **Initial Table Rows**
32. **Hide ID Column**
33. **Track Items Stock**
34. **Enable impersonation**
35. **Play sound on order item**
36. **Print using POS Print Server**
37. **Automatically print or open browser print dialog**
38. **Set categories sidebar initially collapsed on POS screen**
39. **Enable restaurant feature for POS i.e, Halls, Tables & Recipe Items**
40. **Require Country & State (must enable if you have state level taxes)**
41. **Order View Settings**
42. **Auto Update Settings**

Mail Settings

You can update email settings and it has option to use i) SMTP, ii) Send Mail, iii) Mailgun and iv) SparkPost. If you need SES or any other, please request us and we will add in future updates.

Payment Settings

You can update payment settings and it has options for i) Stripe, ii) PayPal Pro, iii) PayPal Rest and iv) Authorize.net. If you need any other payment gateway, please request us with developer account details of the Gateway and we will add in future updates. We want to add PayU, RazorPay and PayStock but we don't have developer account, if you can create developer account and let us know the details, we will add these and other requested payment gateways in future updates.

Weighing Scale Barcode Settings

You can configure the weighing scale barcode here. Let me system know, how to pares your scale barcode and it will be parsing them to add the items with weight to orders. There is guide button to explain this settings, please refer to it if you need.

Change Application Logo

Default application logo, will be used, if the location logo is not set.

Item Label Design

We have added the option for you to design the label as you need. MPS will send print using browser.

Accounts

MPS has basic accounting features. We know that we need to improve this section and we will be improving/adding feature as you provide us feedback.

These are the bank/payment accounts those will be used to receive/sent payments for sales, purchases, income and expense. System will keep the account sync and you can view the account transactions/statement, please click toggle form to have report customization form.

If you want us to add/improve any feature, please do let us know.

Locations

Locations are similar to stores or warehouses. You can add sales, purchases, incomes ann expenses to them, manage item stock and pos registers. You can add locations as you need and manage them all from single application.

Promotions

Add sale promotions for items or categories. You have 4 promotion options

1. **Simple Discount** - apply discount to promotional items
2. **Advance Discount** - apply conditional discount to promotional items
3. **Buy X Get You** - Buy some item top get other free
4. **Spend X to get discount** - Spent x amount to get discount

Brands

You can manage item brands

Categories

You can manege multiple level of categories

Taxes

Add taxes to easily apply them while adding items or orders.

Custom Fields

Custom Fields allow you to add form field to many form of the application. You can add field to Customer, Delivery, Expense, Income, Item, Location, Payment, Purchase, Quotation, Return Order, Sale, Stock, Stock, Supplier form and can be of types Text, Number, Select, Textarea, Checkbox, Radio Button, Date and DateTime. You can set order and select required to make them required on the forms.

Options for multiple choice type fields should be separated by pipe `|`

customer Groups

You can add customer group to apply discount to them. This will be useful for the reseller and distributor type of customers.

Hall & Tables

You can manage hall & tables for your restaurant and open easily open orders on POS.

Unit of measurements

You can add units and use them while adding/selling/purchasing items.

Support

Just remember, we’re always a question away if you need help.

Reports

Reports

We have tried to add extensive report but still we might have missed some. Please check the available reports and let us know if there is any thing that we can improve.

1. Registers
2. Expiry Alerts
3. Quantity Alerts
4. Items Report
5. Top Items Report
6. Sales Report
7. Purchases Report
8. Payments Report
9. Expenses Report
10. Incomes Report
11. Tax Report
12. Stock Transfers
13. Stock Adjustments
14. Time Clock Logs
15. Activity Logs

All the reports have customization form that can be toggle from the top right of content section.

Request Report

If some reports are not there, please request and we will add them in future updates.

Support

Just remember, we’re always a question away if you need help.

Frequently Asked Questions

We have tried to list some frequently asked questions. This page will be updated time to time with new FAQs.

General

How many items can be managed with this Modern POS Solution?

You can have any number of items as you need.

Can I modify the item?

Yes, as per license. Regular License doesn't come with source code. You will need standard or extended license those comes with source code.

Can I manage multiple locations/stores?

Yes, you can manage multiple locations/stores with single installation.

Can I bill from business/companies?

No. There is no option to sale from different companies.

Can I white label it to have my company name and logo?

Please update the App Name & Short Name in application settings.

How can I change the sale logo?

Please upload the new logo from application settings.

How can I translate into other language?

Please duplicate the `modules/MPS/Resources/lang/en.json` & `modules/MPS/Resources/lang/en` and rename the `en` to your language code i.e, `es` for Spanish & `fr` for French. Lastly translate all the files to your language.

How can I enable Indian GST?

You don't have to enable it, just add taxes and then assign those to your items. System will automatically calculate the correct taxes for you depending on the customer/supplier states. This is useful for all other countries those uses state related taxes such as Canada.

Can I install this item on localhost?

Yes, you can install this item on localhost with any web platform xampp, mamp, lamp, wamp or easyphp. Internet connectivity is required for installation to verify the purchase. Once installed, you can use it without Internet.

Can I use it offline if I have installed it on live server?

MPS has option to cache the get requests only. You won't be able to post/add any data but if you have visited the page before and Internet is down, you will be able to view the page (it will be loaded from cache).

Will I get the full source code?

No. For Regular license as the code will be minified for regular license.

Yes, for Standard and Extended Licenses.

Can I can sell the items even if I don't have stock?

Yes, you can sell the item even if it's out of stock, system will set the quantity to -ve and adjust it on purchase.

Why I need to set cron job?

Cron job need to be set to generate recurring sales and send payment requests for due payments.

Can I change the customer view bill content?

No. There is no option to change the customer view contents. You can cover them with promo video or any other details. You can resize the windows as you need.

Users

How many user roles are available?

MPS has option to add User Roles and set Permissions as you need.

1. Super (super admin)
    - Can perform all actions
2. Customer (site customer)
    - Can update customer company details
    - Can view own sale, recurring sale and payments
3. Supplier (site supplier)
    - Can update supplier company details
    - Can view own purchases and payments
4. Add User Role
    - You can set Permissions for the role

Which one is the default user role?

You can select the user roles while adding new user.

Where can I set permissions for user role?

Please visit the list user roles and then from actions column click the first icon to set user role permissions.

Can I add new user role?

Yes, you can add new user role from users menu.

Payments

What payment gateways are available in MPS?

PayPal for online payments while for credit/debit card you can choose any of the following

1. Stripe,
2. PayPal Pro,
3. PayPal Rest APIs
4. Authorize.net

Can I have recurring sale or subscription?

Yes, you can add recurring sale and system will generate sale and payment request automatically once the cron job run. There is no option for user subscription.

Errors

Why am I getting CloudFlare Security or Blank error on verification while installation the item?

If you are not getting any error but blank red alert or CloudFlare Security error mean your request is no reaching to verification server. Please check that you server is not blocking the curl request and secondly there are chances that CloudFlare might be challenging your request due to various reasons. Please check with your host and request them to white list CloudFlare IPs https://www.cloudflare.com/ips Updating your Anti-Virus and Browser might help. You can check with your host too.

You can try different host and/or install it locally with any web platform `easyphp` / `lamp` / `mamp` / `wamp` / `xampp`.

Why am I getting 500 Internal Server Error?

You shouldn't get such error if the server requirements were fine while installing the item.

500 are server internal errors and you can check your server error log to get more details of the error, if you are on live server and not sure, you can check with your host.

You can check the app logs in `storage/logs/` directory. Once you have the error details please ask question on support portal with details, we will check and suggest you the solution.

Why I can't send emails?

Please double check your email configuration details in system settings.

Why I am getting db error and can't login?

Please make sure that your database server is up and running, then check .env file in main directory for database details.

Why some items are missing from order when I add 100+ items?

There is no restriction in MPS code on the number of order items. If you are having such issue, please check your PHP configuration file (php.ini) for `max_input_vars` and set it to higher number i.e, 10000. You might need to increase `max_input_time` and `max_execution_time` too.

Developer Guide

What's included

Regular license doesn't come with front-end (vue), feature tests, database migrations & seed files. These all are included in standard/extended license but standard/extended license download file doesn't have vendor folder as you can run `composer install` and for front-end (vue) `yarn` or `npm i` I would recommend you to use npm.

Modify Email Templates

You can modify the Laravel email/notification template. The view files are in `resources/views/vendor/mail` and `resources/views/vendor/notifications` folders.

Standard/Extended License

If you have purchases standard/extended license then you will get the minimal download file. You can download, open the extracted folder and run the following commands to install dependencies:

```
# Install back-end (composer) dependencies with
composer install

# Install front-end (npm) dependencies with
npm i                       # with npm

yarn                        # if you prefer yarn

# modules script
npm run mps:i               # to install module packages
npm run mps:u               # to update module packages
npm run mps:h               # to hot reload module
npm run mps:w               # to compile & watch module
npm run mps:p               # to compile module for production

# to compile all module for production & generate service worker
```

```
npm run prod
```

As you know the front-end is Vuejs and back-end Laravel. If you need any help regarding them, you can visit documentation for at [Laravel Docs] and [Vue Docs].

Where is the manifest file.

Manifest file path is `resources/sw/manifest.json`

Where is the service worker file.

Service worker is being generated with workbox-cli and you can check the `workbox-config.js`

Module Front-end

The front end is not api based but tradition web app and the source code can be found in `modules/moduleName/`

```
MPS main app file           => modules/MPS/Resources/js/app.js
MPS main scss file          => modules/MPS/Resources/sass/app.scss
MPS vue components folder   => modules/MPS/Resources/js/components
MPS vuex store file         => modules/MPS/Resources/js/store/index.js
MPS vue-router file         => modules/MPS/Resources/js/routes/index.js
```

The above mention module MPS is used for admin area.

Support for Modifications

Please be informed that we can't offer support/help for modifications, you need to manage

it yourself. If you don't know then you can hire developer to help you modify the item as you need.

Do you provide customization/modification service?

Yes, we do provide customization/modification. We charge `$50/hours` and availability depends on `schedule`. You can email to support@tecdiary.com with your requirements to get estimate.

I can't find answer in docs?

If you can't find answer here in docs, you are suggested to ask question at support portal https://tecdiary.net/support/modern-point-of-sale-solution. Please be patient while accepting our response as it could take 1 - 2 working days to respond.

MPS - Developer Guide

What's MPS module

MPS stands for Modern Point of Sale Solution (admin area) for the application.

```
modules/MPS
        ├── Actions
        ├── Config
        ├── Console
        ├── Database
        │   └── factories  — — — — — — — module model factories
        │   ├── Migrations — — — — — — — module migrations
        │   └── seeds – — — — — — — — — module model seeders
        ├── Events
        ├── Exports
        ├── FiscalServices
        │   └── SendSaleToFiscalService   — — modify this to report sale to
your fiscal service
        ├── Helpers  — — — — — — — — — module helper functions are
declared inside this
        ├── Http
        │   └── Controller — — — — — — — module controllers
        │   ├── Middleware — — — — — — — module middleware, register them
in module service provider
        │   └── Request — — — — — — — — requests for validation of
controller methods
        ├── Imports
        ├── Listeners
        ├── Models   — — — — — — — — — module models
        │   └── Traits  — — — — — — — — module trails
        ├── Notifications  — — — — — — — module notifications
        ├── Observers
        ├── Policies
        ├── Providers   — — — — — — — — module service providers
        ├── Resources   — — — — — — — — module resources
        │   └── js   — — — — — — — — — Javascript & Vue application
        │   │   └── components   — — — — — Vue components
        │   │   ├── core   — — — — — — — Vue core helpers, filters &
mixins
```

```
│   │   ├── mixins — — — — — — — — Vue component mixins
│   │   ├── routes — — — — — — — — Vue routes
│   │   ├── store  — — — — — — — — Vuex store
│   │   ├── app.js — — — — — — — — Vue application main file
│   │   ├── bootstrap.js — — — — — — JS main file
│   │   └── i18n.js   — — — — — — — Vue internationalization file
│   ├── lang — — — — — — — — — — module sass files (styles)
│   ├── less — — — — — — — — — — iview style files
│   ├── sass — — — — — — — — — — module sass files (styles)
│   ├── sounds
│   └── views – — — — — — — — — — module blade views
├── Routes – — — — — — — — — — — module routes
├── Services — — — — — — — — — — module service (used to prepare
order data)
├── Tests
├── .gitignore
├── module.json
├── package.json
└── webpack.mix.js
```

Fiscal Services

There is no service yet but will be added as we receive the requests. If you need to report to your local fiscal service. You can do that in the `modules/MPS/FiscalServices/SendSaleToFiscalService.php` file.

If you want to request us to add fiscal service, please ask question on item support with the documentation link (English version only) of your Fiscal Service.

In case your fiscal service don't have documentation in English, then we won't be able to add it for you. You will need to hire any local developer to help you add the service.

Miscellaneous

Imports & Exports

There is no option to import/export any data yet. We will be added option in future updates.

I can't find answer in docs?

If you can't find answer here in docs, you are suggested to ask question at support portal https://tecdiary.net/support/modern-point-of-sale-solution. Please be patient while accepting our response as it could take 1 - 2 working days to respond.