

# TILLPOINT

## *Onboarding Guide*

### WORKFLOWS ADDENDUM

Sections 6–12 | Complete Step-by-Step Operational Workflows

Sales • Analytics • Reminders • Administration • Data Sync • Error Handling •  
Mobile

#### SECTION 6

## Sales & Checkout Workflows

### 6.1 Complete Sales Process

#### STEP-BY-STEP SALES PROCESS

##### 1 ORDER BUILDING

## **Product Selection**

- Search for products by name, barcode, or category
- Add products to current order
- Adjust quantities and pricing as needed
- System calculates running total in real-time

## **Order Management**

- Remove items from order if needed
- Apply discounts to individual items or entire order
- Add order notes or special instructions
- Preview order summary

## **2 CUSTOMER INFORMATION**

### **Customer Details (Optional)**

- Enter customer name and phone number
- System checks for existing customer records
- Creates new customer if not found
- Links customer to transaction for reporting

## **3 PAYMENT PROCESSING**

### **Payment Method Selection**

- Choose payment method: Cash, Card, or Credit

- System updates payment interface accordingly

### **Cash Payment Process**

- Enter amount received from customer
- System calculates change automatically
- Shows change due to customer
- Confirms payment completion

### **Partial Payment Process**

- Enable partial payment option
- Enter partial amount to be paid today
- System calculates remaining balance
- Add payment notes and due date
- Creates payment reminder automatically

## **4 TRANSACTION COMPLETION**

### **Order Processing**

- System validates all order details
- Processes payment and updates inventory
- Creates transaction record in database
- Generates unique transaction ID

### **Receipt Generation**

- System creates receipt with business branding
- Includes all transaction details
- Shows payment method and amount

- Displays partial payment information if applicable
- Option to print or email receipt

### **Post-Transaction**

- System updates inventory levels
- Records customer purchase history
- Updates sales analytics and reporting
- Clears current order for next transaction

## **6.2 Partial Payment Workflow**

### **PARTIAL PAYMENT PROCESS**

#### **ENABLE PARTIAL PAYMENT**

- Toggle partial payment option in sales interface
- System shows partial payment controls
- Displays remaining balance calculation

#### **PAYMENT CONFIGURATION**

- Enter amount customer is paying today
- System calculates remaining balance

- Add payment notes and due date
- Select payment method for partial amount

## **PAYMENT PROCESSING**

- Process partial payment as normal transaction
- System records partial payment details
- Creates reminder for remaining balance
- Generates receipt showing payment status

## **REMINDER MANAGEMENT**

- System automatically creates payment reminder
- Reminder appears in Reminders section
- Staff can track and follow up on due payments
- Process additional payments when customer returns

**SECTION 7**

# Dashboard & Analytics Workflow

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## 7.1 Dashboard Data Loading

### DASHBOARD LOADING PROCESS

#### INITIAL DATA LOAD

- System loads business and branch context
- Fetches current day sales data
- Retrieves inventory status and alerts
- Loads recent transaction history

#### REAL-TIME UPDATES

- System subscribes to real-time data changes
- Updates dashboard metrics automatically
- Shows live sales and inventory changes
- Displays new transactions as they occur

#### PERFORMANCE METRICS

- Calculates daily, weekly, and monthly totals
- Compares current performance to previous periods
- Shows top-selling products and categories
- Displays low stock alerts and reminders

## 7.2 Reporting & Analytics

### REPORTING PROCESS

#### REPORT SELECTION

- Choose report type (sales, inventory, customers)
- Select date range for analysis
- Filter by branch, category, or product
- Choose report format and detail level

#### DATA PROCESSING

- System queries database for specified criteria
- Calculates metrics and summaries
- Generates charts and visualizations

- Formats data for presentation

## **REPORT DELIVERY**

- Display report in dashboard interface
- Option to export as PDF or CSV
- Email reports to specified recipients
- Schedule recurring reports



**SECTION 8**

# Reminders & Notifications Workflow

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## 8.1 Reminder Creation & Management

### REMINDER PROCESS

#### REMINDER CREATION

- Navigate to Reminders section
- Click "Add Reminder" or create from partial payment
- Fill reminder details: Title, Description, Date & Time, Priority, Associated transaction (optional)

#### AUTOMATIC REMINDERS

- Partial payment due dates
- Low stock alerts
- Scheduled business tasks
- Customer follow-ups

## REMINDER MANAGEMENT

- View all active reminders in dashboard
- Mark reminders as resolved when completed
- Edit reminder details if needed
- Delete completed or cancelled reminders

## SECTION 9

# Admin & User Management Workflow

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## 9.1 User Creation & Management

### USER MANAGEMENT PROCESS

#### ACCESS ADMIN PANEL

- Navigate to "Admin" section (Admin/Owner roles only)
- System displays user management interface
- Shows current users and their roles

### **CREATE NEW USER**

- Click "Add User" button
- Fill user details: Username, Email, Role, Branch, PIN (optional), User icon

### **PERMISSION CONFIGURATION**

- Set role-based permissions
- Configure branch access
- Set feature restrictions
- Define data access levels

### **USER ACTIVATION**

- Review user configuration
- Activate user account
- System sends login credentials
- User appears in user selection screen

## **9.2 Business Settings Management**

### **SETTINGS MANAGEMENT**

- Update business information
- Modify receipt formatting
- Configure tax rates and currency
- Set business hours and policies
- Configure POS preferences and integrations
- Manage backup, security, and notification preferences

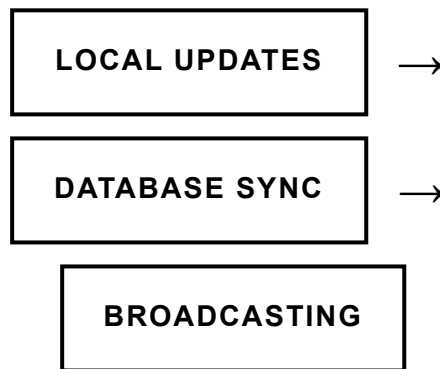
**SECTION 10**

# Data Synchronization & Backup Workflow

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## 10.1 Real-Time Data Sync

### SYNC PROCESS



#### LOCAL UPDATES

- User performs action (sale, inventory change, etc.)
- System updates local state immediately
- Shows optimistic UI updates

#### DATABASE SYNCHRONIZATION

- System sends data to Supabase database

- Database processes and validates data
- Updates are committed to database

### **REAL-TIME BROADCASTING**

- Supabase broadcasts changes to all connected clients
- Other users receive live updates
- System updates UI components automatically

## **10.2 Backup & Recovery**

### **BACKUP PROCESS**

- System performs daily automated backups to secure cloud storage
- Maintains backup history for recovery
- Admins can trigger manual backups for specific ranges or data types
- Download backup files for local storage and verify integrity

## **SECTION 11**

# Error Handling & Recovery Workflow

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## 11.1 Error Detection & Response

### ERROR HANDLING PROCESS

#### ERROR DETECTION

- System monitors for errors and failures
- Detects network issues, database errors, validation failures
- Logs error details for debugging

#### USER NOTIFICATION

- Display user-friendly error messages
- Provide guidance on resolution steps
- Show retry options where appropriate
- Maintain system stability during errors

#### RECOVERY OPTIONS

- Automatic retry for transient errors

- Manual retry options for user-initiated recovery
- Fallback procedures for critical failures
- Data recovery from backup if needed

## SECTION 12

# Mobile & Responsive Workflow

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## 12.1 Mobile POS Operations

### MOBILE WORKFLOW

#### RESPONSIVE DESIGN

- Interface adapts to mobile screen sizes
- Touch-friendly buttons and controls
- Optimized navigation for small screens
- Mobile-specific layouts and interactions

#### MOBILE FEATURES

- Camera integration for barcode scanning
- Touch gestures for product selection



- Mobile-optimized payment processing
- Offline capability with sync when online

***Documentation Note:*** *This workflows addendum covers sections 6–12 of the TillPoint POS Onboarding Guide. For complete system documentation including initial setup, product management, and technical specifications, please refer to the main onboarding guide and technical documentation.*

## TILLPOINT POS

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