BUSINESS MANAGEMENT CONSOLE

BMC

USER MANUAL

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BMC
BUSINESS MANAGEMENT CONSOLE

TABLE OF CONTENTS

CHAPTER I: INTRODUCTION

WHAT IS BMC AND HOW CAN IT HELP MY BUSINESS?

BUSINESS MANAGEMENT CONSOLE (BMC)

SUB TEXT Business Management Console (or BMC) is built to help small-medium retail businesses and entrepreneurs keep track of their customer orders, inventory, pricing, point-of-sales, and use a basic data-driven approach in making business decisions. BMC offers the following main features:

MAIN FEATURES

	Accounts Management BMC is password-protected. Business owners can create and manage various accounts with different access permissions. Administrator accounts can access all features while Normal accounts can only access the Inventory Management, Point of Sales, and Orders Management features. This is perfect for business owners who employ cashiers and staff that conduct business transactions in their place.
	Business Profile Business owners can store their business details that are often used in transactions and forms (e.g TIN, Registered Address, DTI certification Number, etc.). This feature also allows users to schedule important one-time or monthly reminders such as monthly tax obligations and scheduled meetings, appointments and product deliveries.
	Point of Sales (POS) aka Cashier BMC's simple POS system allows users to check-out purchased goods with proper logging, time stamp and price records. The items available for check out will come from the Inventory Management Database. This assures the owners that the items being sold to customers are from the store's official Inventory, including the fixed price and discounts issued. POS feature includes barcode scanner compatibility and automated receipt printing.
	Inventory Management Business owners can keep track of their inventory with BMC's Inventory Management feature. This feature is compatible with barcode scanners and is automatically connected to the POS system. Inventory Management also has a 'rejects section' wherein business owners can keep track of items in the inventory that are NOT GOOD for selling.
	Sales Monitoring All transactions in the POS are automatically logged by BMC in organized graphs according to date of sale, supplier, product brands and item specifications. Business owners can easily study sales trends and identify which products are selling and which of them are not.

	Finance Monitoring All transactions in POS and Inventory Management are automatically logged by BMC in organized graphs and charts. Finance Monitoring feature allows business owners to visualize inventory cost, revenues and profits all categorized in monthly and annual graphs.
	Orders Management Easily manage customer orders with the Orders Management feature. This feature allows users to log customer orders in forms which includes customer details, order details, delivery details, schedule, products breakdown and prices. This feature organizes the logged orders according to customer.

CHAPTER II: INSTALLATION and REQUIREMENTS

HOW DO I INSTALL BMC?

REQUIREMENTS

Layertech BMC is compatible with the following device specifications:
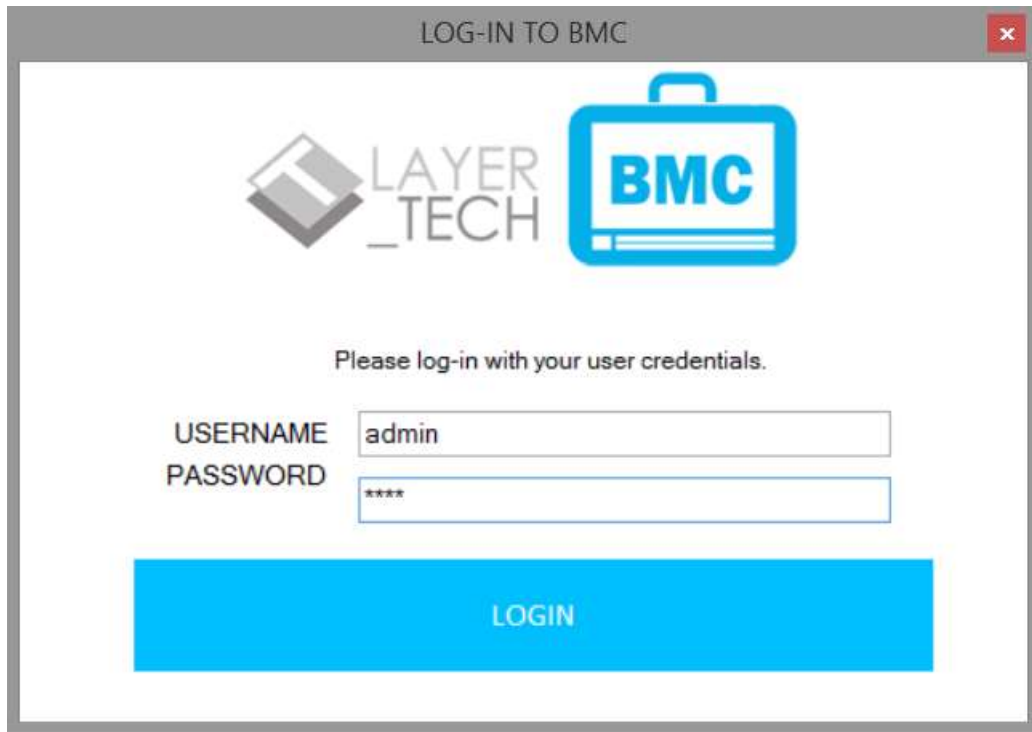
OPERATING SYSTEM	Windows
.NET	Version 5
SQLite Framework	SQLITE x86 version 1.0.105 (sqlite-netFx45-setup-bundle-x86-2012-1.0.105.0.exe – included)

STEP-BY-STEP INSTALLATION GUIDE

To install BMC, follow the following steps:

STEP 1 : Install SQLITE Framework
STEP 2 : Run setup.exe
STEP 3 : Generate PID
STEP 4 : Go to https://www.layertechlab.com/purchase/ and purchase your license.
STEP 5 : Unlock the Software using the custom license key that you will receive from Layertech. Log in with DEFAULT account

DEFAULT LOG-IN

After a successful installation and activation, you can log-in to BMC using the following default ADMIN username and password:

USERNAME	admin
PASSWORD	pass

You may later change this account's details, or create new accounts in the USER MANAGEMENT feature of BMC. **We recommend that you create a NEW ADMIN account with a strong password.**

CHAPTER III: DASHBOARD

After a successful log in, you will be redirected to BMC's dashboard. Here, you can access all of BMC's features. The dashboard is separated into three groups:

1. **DARK GREY MENU STRIP** – containing the user account and admin account creation options.
2. **LIGHT GREY MENU STRIP** – under the dark grey menu strip is the main menu of BMC. It features the six main features of BMC, displayed with easy-to-recognize icons.
3. **SIDEBAR** – the side bar of the dashboard displays the current user name, his/her designation and the account type.

CHAPTER IV: ACCOUNTS MANAGEMENT

MANAGE USER ACCOUNTS AND PERMISSIONS.

TWO TYPES OF USER ACCOUNTS

BMC has TWO types of user accounts:

NORMAL USERS	Can access limited features of BMC. Normal users cannot change company profile in the Profile section, they can't see the sales monitoring and financial charts.
ADMIN USERS	The default account listed above is an ADMIN USER. Admin users can access ALL features of BMC.

ACCESSING THE USER MANAGEMENT FEATURE

To access the USER MANAGEMENT feature, click the ADMIN button at the top left corner of the Dashboard, on the DARK GREY MENU STRIP.

VIEWING USER ACCOUNTS
There are TWO TABS in the USER MANAGEMENT window: ADMIN USERS and NOMAL USERS. All NORMAL users are listed under the NORMAL USERS tab, while all ADMIN users are listed under the ADMIN USERS tab.

EDITING USER ACCOUNTS
1. In the accounts table, select the row of the account you want to edit.
2. Once the chosen row is highlighted, click the EDIT USER DETAILS button.
3. The existing information should now be visible in the ADD/EDIT USER box. Make the changes you want in the box and click SAVE USER CREDENTIALS button.
4. The new and updated information should now be visible in the tables.

DELETING USER ACCOUNTS
1. In the accounts table, select the specific account you want to delete.
2. Once the chosen row is highlighted, click the DELETE USER button.
3. Confirm deletion. The deleted user should no longer be listed in ANY of the tables.

> **NOTE**
>
> DELETED ACCOUNTS CANNOT BE RESTORED!

CREATING NEW USER ACCOUNTS
1. Type all the NEW USER information required in the ADD/EDIT USER box.

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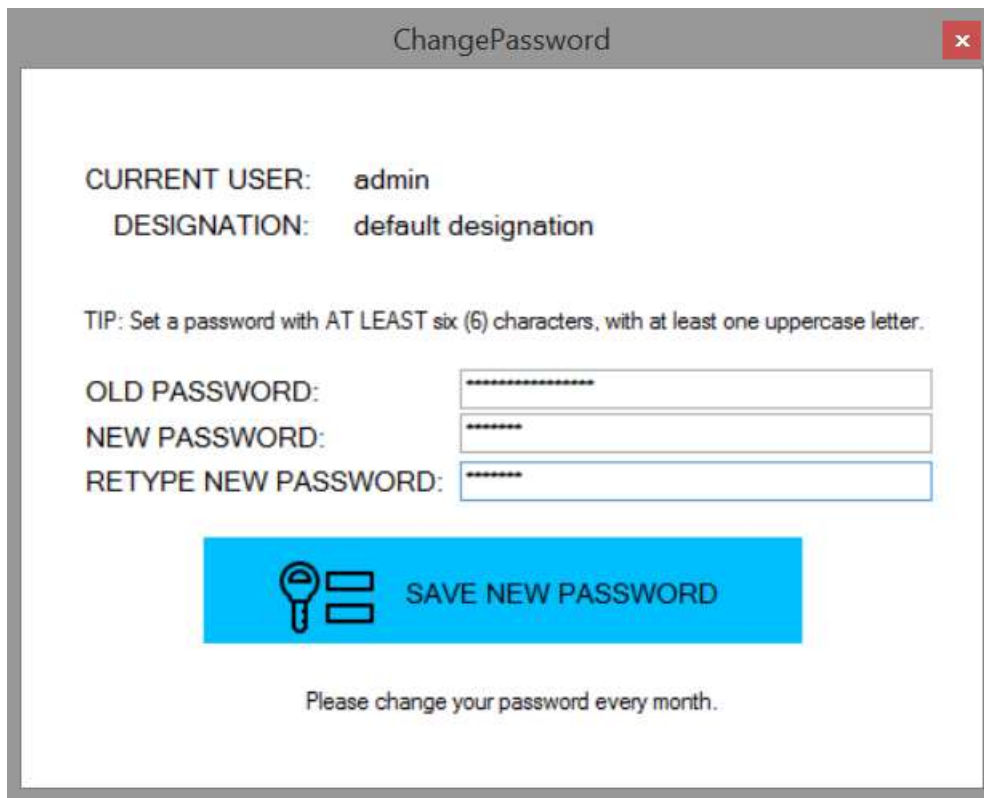
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2. If you want the NEW USER to be an ADMIN USER, tick the ADMIN USER? Check box. Otherwise, leave it unchecked.
3. Click the SAVE USER CREDENTIALS button to save new entry. The information should now be visible in the corresponding table on the left.

CHAPTER V: CHANGING PASSWORD FOR NORMAL USERS

NORMAL USERS MAY CHANGE THEIR PASSWORDS USING THE PASSWORD CHANGE FEATURE.

ACCESSING THE CHANGE PASSWORD FEATURE

This feature is under the USER button at the top left of the dashboard, on the dark grey menu strip.

CHANGING NORMAL USER PASSWORD

To change password, type the following details:

- OLD PASSWORD
- NEW PASSWORD
- Retype NEW PASSWORD

And click SAVE NEW PASSWORD BUTTON.

NOTE
AFTER PASSWORD CHANGE, LOG-OUT OF BMC AND RE-LOG-IN USING YOUR NEW PASSWORD.

CHAPTER VI: BUSINESS PROFILE AND SCHEDULER

Business owners can store their business details that are often used in transactions and forms (e.g. TIN, Registered Address, DTI certification Number, etc.). This feature also allows users to schedule important one-time or monthly reminders such as monthly Tax obligations and scheduled product deliveries.

ACCESSING BUSINESS PROFILE AND SCHEDULER FEATURE

The Business Profile feature can be accessed by clicking the PROFILE button at the leftmost part of the light-grey menu strip.

The feature's window has three TABS: MY SCHEDULER, EDIT PROFILE and MY CALENDAR.

ADD / DELETE SCHEDULE

You can Add/Delete schedules in the FIRST TAB of the feature's window.

To ADD, select the date, type the schedule description in the box and TICK THE CHECKBOX if you want this schedule to run MONTHLY on the same day. Click SAVE button. The schedule entry should automatically appear on the DELETE SCHEDULE box on the left.

To DELETE schedule, select the schedule you want to delete on the DELETE SCHEDULE box on the left. Once selected schedule is highlighted, click the DELETE SELECTED button. Confirm deletion and it should no longer appear on the list or in any of the scheduler functions.

EDIT BUSINESS PROFILE (Admin Users only)

Business owners can edit their business details in the SECOND TAB of this feature. In the second tab, the current details will automatically be listed in editable textboxes.

Edit the details you wish to change and click the UPDATE BUSINESS PROFILE button. The new, updated details will automatically be displayed on the leftmost pane of the feature's window.

My Calendar

All saved schedules are displayed in the MY CALENDAR TAB. The dates with scheduled tasks will have a BOLD font number on the mini-calendar.

Select a date on the mini-calendar, and the task details scheduled on that day should appear on the left table. One-time reminders will be listed under the ON THIS DAY table, while monthly reminders will be listed under the MONTHLY REMINDERS table.
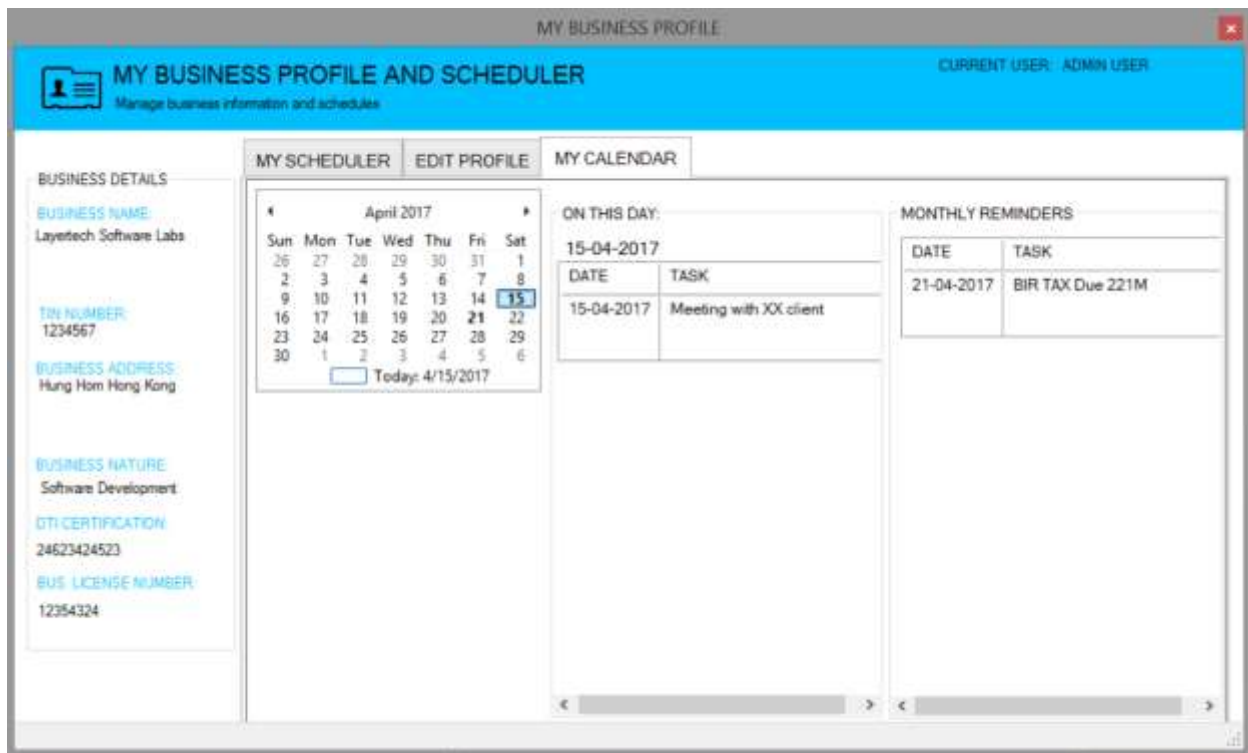
CHAPTER VII: POINT OF SALES (aka CASHIER)

BMC's simple POS system allows users to check-out purchased goods with proper transaction logging, time stamp and price records. The items available for check out will come from the Inventory Management Database. This assures the owners that the items being sold to customers are from the store's official Inventory, including the fixed price and discounts issued.

POS feature includes barcode scanner compatibility and automated receipt printing.

ACCESSING THE POINT OF SALES FEATURE

To access the POS feature from the dashboard, select the second-from-the-left button on the light-grey menu strip.

The POS window has THREE sections: INSTRUCTIONS, CUSTOMER CART and CHECKOUT.

CUSTOMER CART BOX

To start your check-out transaction, select the items to be checked out. You can do this in TWO WAYS:

1. VIA BARCODE	Select the FIRST TAB of the CUSTOMER CART BOX, select the BARCODE FIELD and fire your barcode scanner.
2. VIA MANUAL INPUT	If you do not have a barcode scanner, you can use the SECOND TAB of the CUSTOMER CART BOX. Select the brand of the item, and the item name, in the two drop-down menus. These menus are linked to the Inventory, so cashiers cannot check out items not logged in the Inventory.

After specifying the product, key in the percent discount (for promos, PWDs and Senior Citizens etc.) and the number of pieces (quantity). Then, click "ADD TO LIST." The item should then appear in the CHECKOUT box.

CHECKOUT BOX

Type the name of the customer, to be placed in the invoice and/or official receipt.

You can **REMOVE** punched items on the list by selecting them and clicking REMOVE ITEM FROM CART button.

The total price of all items is automatically displayed inside this checkout box.

Once FINALIZED, click the CHECKOUT button. Make sure your computer is connected to a working printer when printing transaction invoices. The entire transaction is automatically logged in the Sales Monitoring and Financial Monitoring sections. Inventory items will be updated as well.

USB BARCODE SCANNER AND PRINTER COMPATIBILITY

BMC is compatible with USB-barcode scanners. Just plug-in your USB barcode scanner and it can be used in BMC's INVENTORY MANAGEMENT and POS features.

BMC is also compatible with most printers. Just connect your already-working printer to your computer. You may automatically print invoices generated in the POS feature, and delivery receipts from Orders Management feature.

NOTE
Please **REVIEW CAREFULLY** the items list before checking out. Once checked out, you will no longer be able to rollback the process. So, be very careful!

Chapter VIII: INVENTORY MANAGEMENT

Business owners can keep track of their inventory with BMC's Inventory Management feature. This feature is compatible with barcode scanners and is automatically connected to the POS system. Inventory Management also has a 'rejects section' wherein business owners can keep track of items in the inventory that are NOT GOOD for selling.

ACCESSING THE INVENTORY MANAGEMENT FEATURE

To access the Inventory Management feature from the dashboard, select the third-from-the-left button on the light-grey menu strip.

The feature's window has THREE TABS: STOCKS SUMMARY, PER-ITEM INVENTORY and RETURNED/REJECTED.
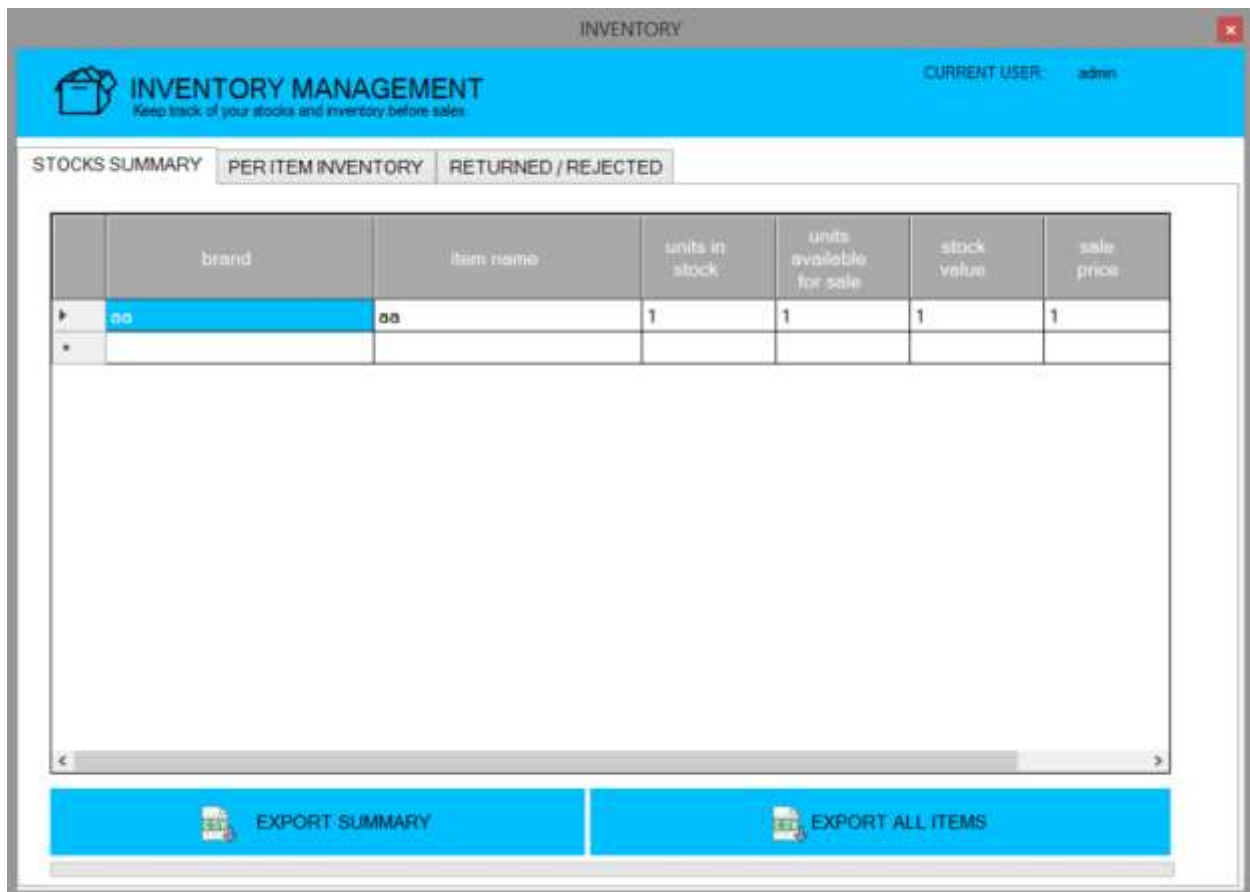
STOCKS SUMMARY

The FIRST TAB of the feature window shows a summary of all the recorded items in the inventory. The table classifies the items according to brand and label, and displays the number of units in stock, the number of units available for sale, the stock value of each unit and the sale price.

EXPORTING INVENTORY FILES TO CSV

It is recommended that you regularly keep backup files of your inventory items. Under the STOCKS SUMMARY tab, you can either export the summary table or the table contacting ALL ITEMS, by clicking the corresponding button. You have to assign your own file-name. We recommend that you include the date of export in your file name.

NOTE

When saving CSV (exported) files, you may need to manually rename the exported file and add a ".CSV" filename extension to open it.

EXPORT SUMMARY	Exports the summary table to a CSV file
EXPORT ALL ITEMS	Exports the table containing ALL ITEMS logged in the inventory.

PER-ITEM INVENTORY AND MOVING ITEMS TO REJECT

The SECOND TAB displays a table containing ALL ITEMS logged in the inventory. In case you find some items in the inventory unfit for selling (or must be returned to supplier), you can move the inventory items to the rejects table on the THIRD TAB. To do so, just select the item on the table. Once highlighted, click MOVE TO REJECT button. The item should now disappear on the table and appear on the REJECTS table on the THIRD TAB.

You can move items back to the inventory list by highlighting the target row and clicking the RETURN ITEM TO INVENTORY button (THIRD TAB). Confirm, and the item should now be gone from the rejects table, and visible on the PER ITEM INVENTORY table on the second tab.

Similarly, you can PERMANENTLY DELETE reject rows by selecting the target row and clicking the DELETE ITEM FROM RECORDS button

ADDING NEW ITEMS TO INVENTORY

To add new items to inventory, fill out the blanks under the ADD ITEMS TO INVENTORY box on the left of the feature window. Then, click ADD NEW ITEMS button and the new items should be displayed automatically on the table on the right.

DELETING ITEMS FROM INVENTORY

To delete items from inventory, just select the row to be deleted on the table on the right. Once the row is highlighted, click the DELETE SELECTED button. Confirm delete, and the item should no longer be visible on the table.

NOTE
DELETING ITEMS and MOVING TO REJECT TABLE are two DIFFERENT functions! Deleting items will permanently delete the item from the database while MOVING TO REJECT just keeps the item from appearing in the POS feature.

CHAPTER IX: SALES MONITORING

All transactions in the POS are automatically logged by BMC in organized graphs according to date of sale, supplier, product brands and item specifications. Business owners can easily study sales trends and identify which products are selling and which of them are not.

ACCESSING THE SALES MONITORING FEATURE

To access the Sales Monitoring feature from the dashboard, select the third-from-the-right button on the light-grey menu strip.

The feature's window has FOUR TABS: SALES PER DAY, SALES BY BRAND, SALES BY ITEM, ALL ITEMS SOLD

SALES PER DAY

Sales per day graph shows the number of items sold per day, monthly. To view graphs of certain months, click the SELECT MONTH drop down menu and select a month on the list. The graph will automatically display the daily sales of your selected month.

SALES BY BRAND

Sales by Brand shows the number of items sold per brand registered in your inventory, monthly. To view graphs of brands and their sales, click the SELECT MONTH drop down menu and select a month on the list. The graph will automatically display the total item sales per brand of your selected month.

SALES MONITORING

SALES MONITORING
Monitor sales trends of your products and brands

| SALES PER DAY | SALES BY BRAND | SALES BY ITEM | ALL ITEMS SOLD |

Determine which brands generate the most sales.

SELECT MONTH 04-2017

<u>SALES BY ITEM</u>
Sales by Item shows the number of specific items sold under the brands registered in your inventory. To view graphs of items, click the SELECT BRAND drop down menu and select a brand on the list. The graph will automatically display the total item sales per item of your selected brand.

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ALL ITEMS SOLD: DELETE ROWS, EXPORT TABLE

This tab shows a masterlist of ALL ITEMS sold (as logged by the POS feature). You can delete rows by highlighting target row and clicking DELETE SELECTED button. You can also keep backups of your sales list by clicking the EXPORT TABLE button.

When you EXPORT the masterlist, you will be prompted to assign a file name and file location. You may need to put a .CSV filename extension after a successful export.

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CHAPTER X: FINANCE MONITORING

All transactions in POS and Inventory Management are automatically logged by BMC in organized graphs and charts. Finance Monitoring feature allows business owners to visualize inventory cost, revenues and profits all categorized in monthly and annual graphs.

ACCESSING THE FINANCE MONITORING FEATURE

To access the Sales Monitoring feature from the dashboard, select the second-from-the-right button on the light-grey menu strip.

The feature's window has TWO TABS: MONTHLY VISUALIZATION and ANNUAL VISUALIZATION

MONTHLY VISUALIZATION

Select a month and year from the dropdown menu on the upper-left part of the window. Click the LOAD DATA button.

A graph should appear, comparing the cost of items sold, revenue from sales, profit from sales, and stock value of remaining items in inventory for the selected month. The figures are all from registered transactions of the POS and Inventory features of BMC.

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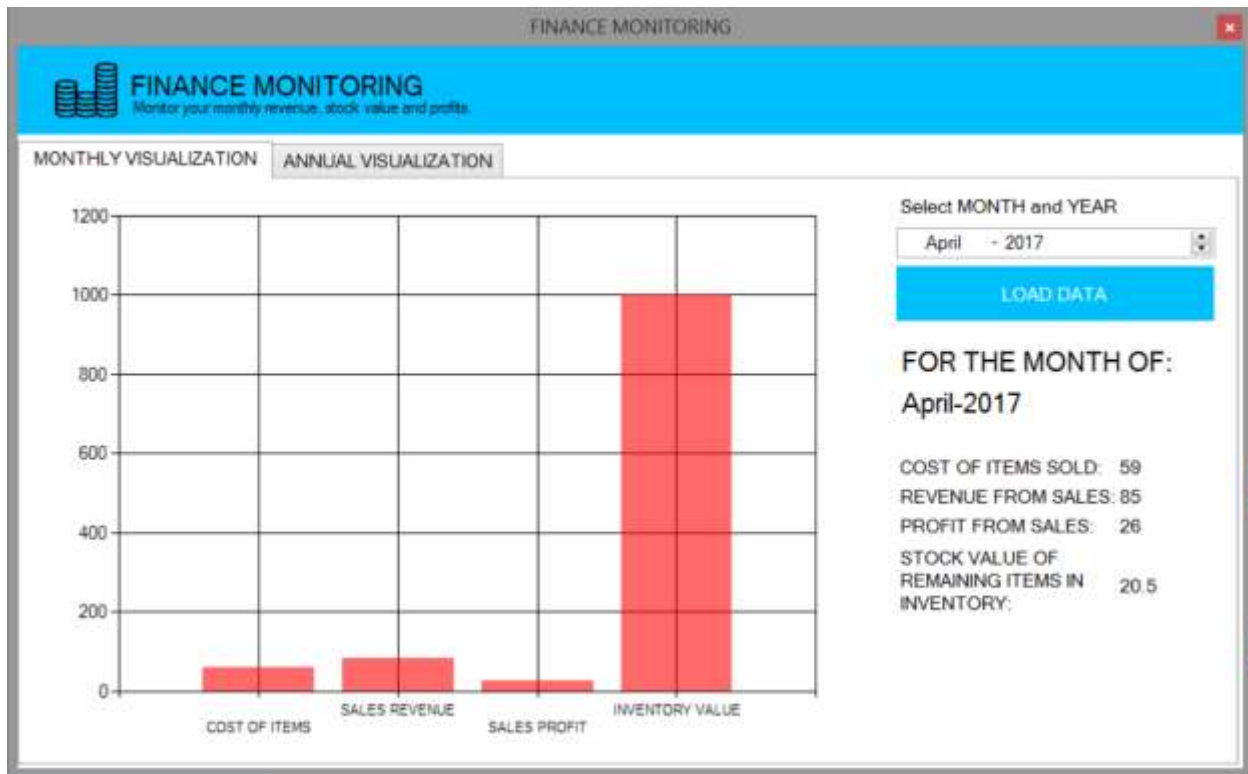
ANNUAL VISUALIZATION

Select a year on the dropdown menu on the lower-left part of the window. Click the LOAD GRAPHS button.

A graph should appear, comparing the cost of items sold, revenue from sales and profit from sales for the selected year. The values are grouped per month on that selected year. The figures are all from registered transactions of the POS and Inventory features of BMC.
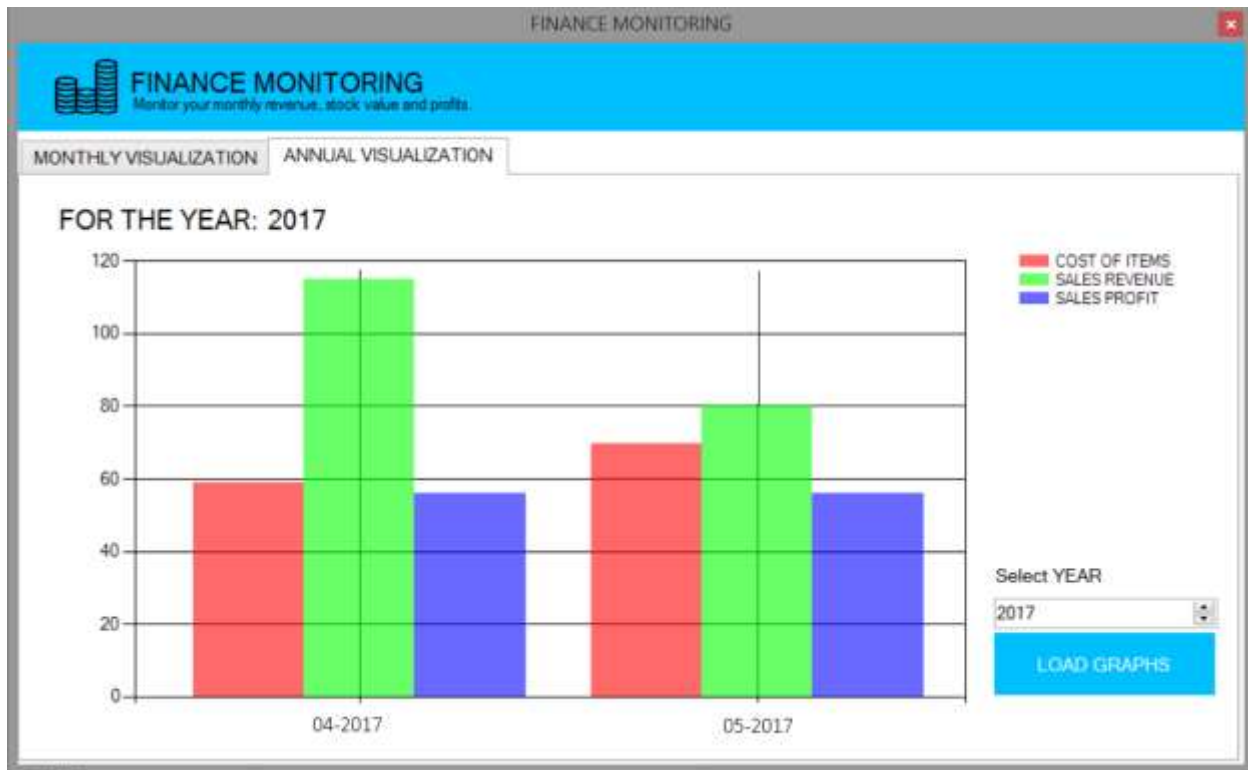
CHAPTER XI: ORDERS MANAGEMENT

Easily manage customer orders with the Orders Management feature. This feature allows users to log customer orders in forms which includes customer details, order details, delivery details, schedule, products breakdown and prices. This feature organizes the logged orders according to customer.

ACCESSING THE ORDERS MANAGEMENT FEATURE

To access the Orders Management feature from the dashboard, select the rightmost button on the light grey menu strip.

Orders Management feature window has TWO TABS: PLACE ORDER and CURRENT ORDERS

PLACE ORDER

The first tab, PLACE ORDER, has four sections: Customer Details, Add Items, Orders List and Payment and delivery details.

To place an order, fill out the name, address and contact number of your customer.

Add the items ordered by the customer thru the ADD ITEMS box. You can either add an item from your current inventory, or, if item ordered is NOT on the current inventory, you may use the NEW ITEMS tab to insert the item details.

Click the ADD TO LIST button.

The added items should now be visible on the ORDER LIST box. Review each item details carefully. You can remove items from the list by selecting the target row and clicking the REMOVE FROM LIST button.

Once order is finalized, select the delivery date of the order, and add additional notes on the box provided (e.g. delivery fee, special handling, etc.)

Click PLACE ORDER. Confirm.

CURRENT ORDERS: VIEWING and REMOVING

The second tab, CURRENT ORDERS, displays the list of pending orders. The customer list is displayed on the right side table of the tab. CLICK THE CUSTOMER NAME, and the corresponding orders listed under that customer should appear on the table on the left.

To remove items/orders, or for completed orders, select the item row you wish to remove and click the REMOVE ORDER button.

NOTE
DELETED ITEMS CANNOT BE RESTORED!

PRINT DELIVERY RECIPT

You can also print a delivery receipt per customer. Click the customer name on the left table. Once customer name is highlighted, click the PRINT DELIVERY RECEIPT button. Make sure your computer is connected to a working printer before doing so!

CHAPTER XII: NOTES and CONCERNS

For additional information, comments, suggestions and questions, please send us a message thru our website: http://www.layertechlab.com/index.php/contact-us/

For support, kindly email support@layertechlab.com **USING YOUR REGISTERED EMAIL**, and please include **YOUR REGISTERED NAME.**

END OF DOCUMENT

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