Palm Oil Shop Management System - User Manual

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Getting Started

First Time Login

1. Open your web browser and navigate to the system URL
2. You will see the login page with the Palm Oil Shop logo
3. Enter your email address and password
4. Click "Log in" to access the system

Default Accounts

For initial setup, use these default accounts:

Administrator Account:

- Email: admin@palmoil.com
- Password: password
- Full system access

Salesperson Account:

- Email: sales@palmoil.com
- Password: password
- Limited access to sales functions

Changing Your Password

1. Click on your name in the top navigation
2. Select "Profile" from the dropdown menu
3. Click "Update Password"
4. Enter your current password and new password
5. Click "Save" to update

User Roles and Permissions

Administrator Role

Administrators have complete access to all system features:

- View and manage all inventory
- Record and view all sales transactions
- Manage purchase records
- Generate all types of reports

- Add and manage user accounts
- Access system settings

Salesperson Role

Salespeople have limited access focused on daily operations:

- View current inventory levels
- Record new sales transactions
- View their own sales history
- Access basic sales reports
- Cannot modify inventory or access financial reports

Dashboard Overview

Admin Dashboard

The admin dashboard provides a comprehensive overview of your business:

Key Metrics Section:

- Today's Sales: Total sales amount for the current day
- Today's Profit: Profit generated today
- Monthly Sales: Total sales for the current month
- Low Stock Items: Number of products below minimum stock level

Quick Actions:

- Record New Sale: Direct link to sales entry form
- Add Purchase: Link to purchase recording form
- View Reports: Access to comprehensive reporting system

- Manage Inventory: Direct access to inventory management

Recent Activity:

- Latest sales transactions
- Recent purchases
- Low stock alerts
- System notifications

Sales Dashboard

The sales dashboard is tailored for sales staff:

Personal Performance:

- Your sales today
- Your monthly performance
- Sales targets and achievements
- Commission calculations (if applicable)

Quick Actions:

- Record Sale: Primary action for sales staff
- View Inventory: Check product availability
- Sales History: View personal sales records

Inventory Management

Viewing Inventory

1. Navigate to "Inventory" from the main menu
2. View the complete list of products with:

- Product name and unit type (litres/jerrycans)
- Current stock levels
- Selling price per unit
- Stock status (In Stock/Low Stock/Out of Stock)

Adding New Products

1. Click "Add New Product" button
2. Fill in the product details:
    - Product Name (e.g., "Premium Palm Oil")
    - Unit Type (Litres or Jerrycans)
    - Selling Price per Unit
    - Initial Stock Quantity (optional)
3. Click "Save Product"

Editing Product Information

1. Find the product in the inventory list
2. Click "Edit" next to the product
3. Modify the necessary information
4. Click "Update Product" to save changes

Stock Level Monitoring

The system automatically tracks stock levels:

- **Green Status**: Well stocked (>10 units)
- **Yellow Status**: Low stock (1-10 units)

- **Red Status**: Out of stock (0 units)

Low Stock Alerts

- Products with low stock appear in red on the dashboard
- Automatic notifications when stock falls below minimum levels
- Restock recommendations in inventory reports

Sales Management

Recording a New Sale

1. Click "Record New Sale" from dashboard or navigation
2. Complete the sales form:
   - **Product**: Select from dropdown list
   - **Quantity**: Enter amount sold
   - **Customer Name**: Optional customer information
   - **Sale Date**: Defaults to today, can be changed
   - **Notes**: Optional additional information
3. The system automatically calculates:
   - Total amount based on quantity × unit price
   - Profit based on cost price vs selling price
   - Updates inventory levels
4. Click "Record Sale" to complete the transaction

Viewing Sales History

1. Navigate to "Sales" from the main menu

2. Use filters to narrow down results:
   - Date range
   - Salesperson
   - Product type
   - Customer name
3. View detailed information for each sale:
   - Date and time of sale
   - Product and quantity sold
   - Customer information
   - Total amount and profit
   - Salesperson who made the sale

Editing Sales Records

1. Find the sale in the sales list
2. Click "Edit" next to the transaction
3. Modify necessary information
4. Click "Update Sale"
   - Note: Editing sales will adjust inventory levels accordingly

Canceling Sales

1. Locate the sale to be canceled
2. Click "Cancel" or "Delete"
3. Confirm the cancellation
4. Stock levels will be automatically restored

Purchase Management

Recording New Purchases

1. Click "Record New Purchase" from the dashboard
2. Fill in purchase details:
   - **Product**: Select product being purchased
   - **Supplier Name**: Enter supplier information
   - **Supplier Phone**: Optional contact information
   - **Quantity**: Amount purchased
   - **Cost Price per Unit**: Purchase price
   - **Purchase Date**: Date of purchase
   - **Notes**: Additional information
3. The system calculates:
   - Total cost (quantity × cost price)
   - Updates inventory levels
   - Calculates potential profit margins
4. Click "Record Purchase" to save

Managing Suppliers

- Supplier information is stored with each purchase
- Build a database of reliable suppliers over time
- Track supplier performance and pricing

Purchase History

1. Navigate to "Purchases" from the main menu
2. View complete purchase history with:
    - Purchase date and supplier
    - Product and quantity purchased
    - Cost per unit and total cost
    - Person who recorded the purchase
3. Use filters to find specific purchases:
    - Date range
    - Supplier name
    - Product type

Reporting System

Accessing Reports

1. Navigate to "Reports" from the main menu
2. Choose from available report types:
    - Sales Reports
    - Profit Analysis
    - Inventory Reports

Sales Reports

Purpose: Analyze sales performance and trends

Features:

- Filter by date range, salesperson, or product

- View total sales, profit, and quantity sold
- Product performance analysis
- Salesperson performance comparison
- Detailed transaction listings

How to Generate:

1. Select "Sales Report" from reports menu
2. Set your desired filters (date range, salesperson, etc.)
3. Click "Generate Report"
4. View results on screen or export to PDF

Profit Analysis Reports

Purpose: Track profitability and identify trends

Features:

- Monthly and yearly profit tracking
- Profit margin analysis
- Performance comparisons
- Trend identification
- Recommendations for improvement

How to Use:

1. Select "Profit Analysis" from reports menu
2. Choose period (monthly or daily view)
3. Select year for analysis
4. Review profit trends and insights

Inventory Reports

Purpose: Monitor stock levels and inventory value

Features:

- Current stock levels for all products
- Inventory valuation
- Restock recommendations
- Stock movement analysis
- Potential profit calculations

Key Metrics:

- Total inventory value
- Products requiring restock
- Highest value inventory items
- Stock turnover rates

Exporting Reports

1. Generate the desired report
2. Click "Export PDF" button
3. The report will be downloaded as a PDF file
4. Use for record-keeping, analysis, or sharing

User Account Management (Admin Only)

Adding New Users

1. Navigate to "Users" or "Staff Management"

2. Click "Add New User"
3. Enter user information:
    - Full Name
    - Email Address
    - Password
    - Role (Admin or Salesperson)
4. Click "Create User"

Managing Existing Users

1. View list of all users
2. Edit user information as needed
3. Change user roles or permissions
4. Deactivate users who no longer need access

Password Management

- Users can change their own passwords
- Admins can reset passwords for other users
- Enforce strong password policies

Best Practices

Daily Operations

1. **Start of Day**:
    - Check inventory levels
    - Review any low stock alerts

- Verify yesterday's sales were recorded

2. **During Sales**:
   - Record each sale immediately
   - Verify customer information when possible
   - Check stock levels before promising products
3. **End of Day**:
   - Review daily sales totals
   - Check for any missing transactions
   - Prepare for next day's operations

Weekly Tasks

- Generate weekly sales reports
- Review inventory levels and plan restocking
- Analyze salesperson performance
- Update supplier information

Monthly Tasks

- Generate comprehensive monthly reports
- Analyze profit margins and trends
- Plan inventory purchases for next month
- Review and update product pricing

Troubleshooting

Common Issues and Solutions

Cannot Login

- Verify email and password are correct
- Check if Caps Lock is on
- Contact administrator to reset password

Sales Not Recording

- Check internet connection
- Verify all required fields are filled
- Ensure product has sufficient stock
- Try refreshing the page and re-entering

Reports Not Loading

- Check date range is valid
- Ensure you have permission to view reports
- Try reducing the date range for large datasets
- Contact administrator if problem persists

Inventory Levels Incorrect

- Check recent sales and purchase entries
- Verify no duplicate transactions were recorded
- Contact administrator for manual stock adjustment

Page Loading Slowly

- Check internet connection speed
- Clear browser cache and cookies
- Try using a different browser

- Contact technical support if issues continue

Getting Help

1. Check this user manual first
2. Look for help tooltips in the system
3. Contact your system administrator
4. Keep track of error messages to report issues

Data Backup

- The system automatically backs up data regularly
- Important reports should be exported and saved locally
- Keep physical copies of critical reports

Security Guidelines

Password Security

- Use strong, unique passwords
- Change passwords regularly
- Never share login credentials
- Log out when finished using the system

Data Protection

- Only access information you need for your role
- Don't leave the system open on shared computers
- Report any suspicious activity immediately

- Keep customer information confidential

System Access

- Only authorized personnel should use the system
- Each person should have their own account
- Report lost or compromised accounts immediately

This user manual covers the essential functions of the Palm Oil Shop Management System. For additional support or advanced features, contact your system administrator.