Storepro™ Application

User Manual

Version Number: 1.0

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Overview of storepro™

Storepro™ is a one-stop application that is designed to enable store owners to manage their businesses professionally with precision and ease. Built using the most recent technology, storepro™ provides store owners with flexible features for handling their store keepers, stock, sales, reports, expenses, payments and many more.

Comprising mainly of five broad features, storepro™ is a highly-customizable solution and is able to manage your store with little or no downtime.

Using the **Stock** feature, you can set up new, modify or remove the details of stock items including stock categories, stock types, stock names, package types, package re order level, package type quantity, stock price, stock return type and stock state; managing purchase stock (recording stock, registering stock and modifying registered stock); arranging stock on shelf, modifying stock on shelf and removing stock on shelf; selling stock and also, modifying sold stock.

The **Payment** feature enables you to set up new and modify the details of existing payment type, set up, modify or remove bank details and also, modify payments.

The **People** feature allows you to set up new or modify the details of existing person types, locations, user types, user login details and also, user roles. You can also assign right to roles and assign roles to users. Additionally, you will be able to set up new, modify or remove the details of existing associate companies and their representatives.

Using the **Account** feature, you can record and track your daily expenses.

The **Report** feature allows you to generate, export and print stock, sales and payment reports within a specific date range as is required.

Getting Started

You must log into storepro™ as a system user in order to access the features and carry out operations using the application.

The operations you will carry out in this system are determined by the category of user you belong to.

Log In

To log into the application, do the following:

1. `On your desktop, click the storepro™ shortcut button to open storepro login page:

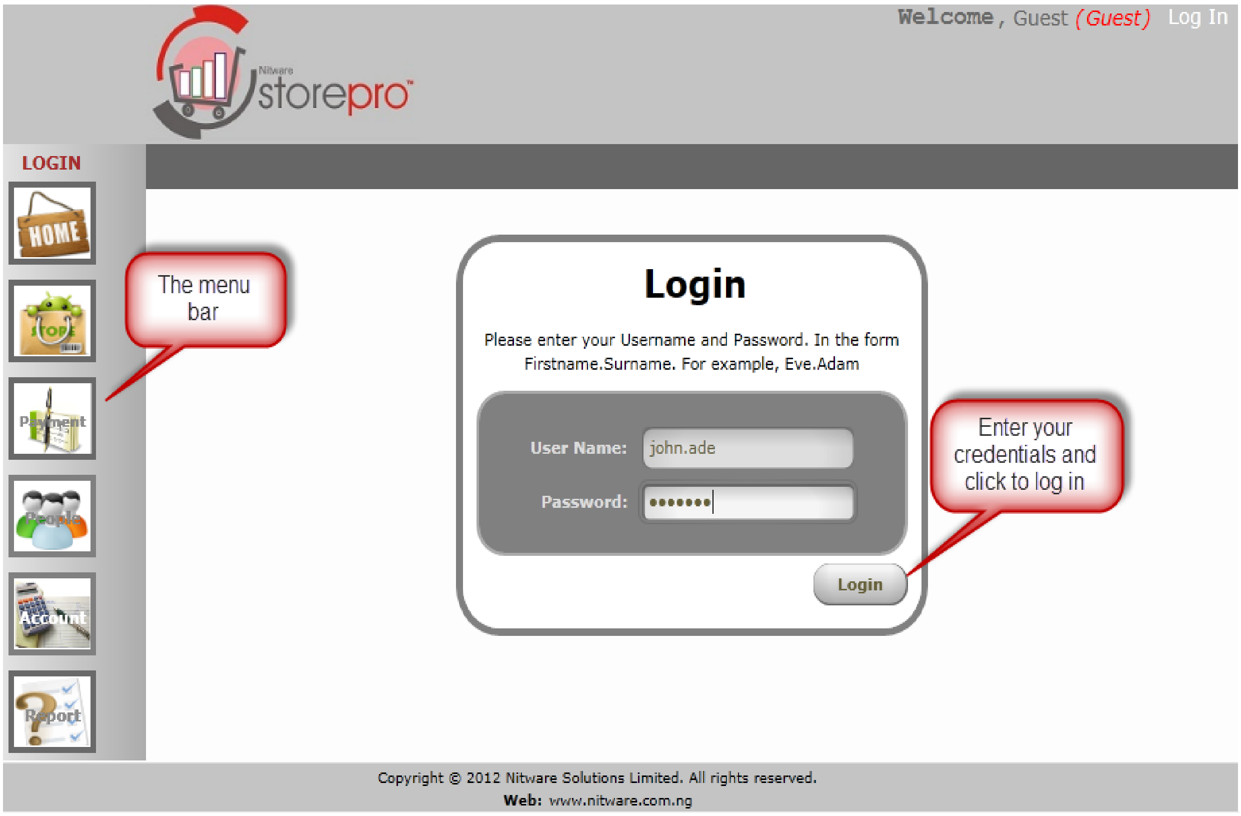


Figure 1 Login panel

2. Enter your username and password in the **Username** and **Password** fields.
3. Click the **Login** button to open the storepro™ homepage. See Figure 2 below:

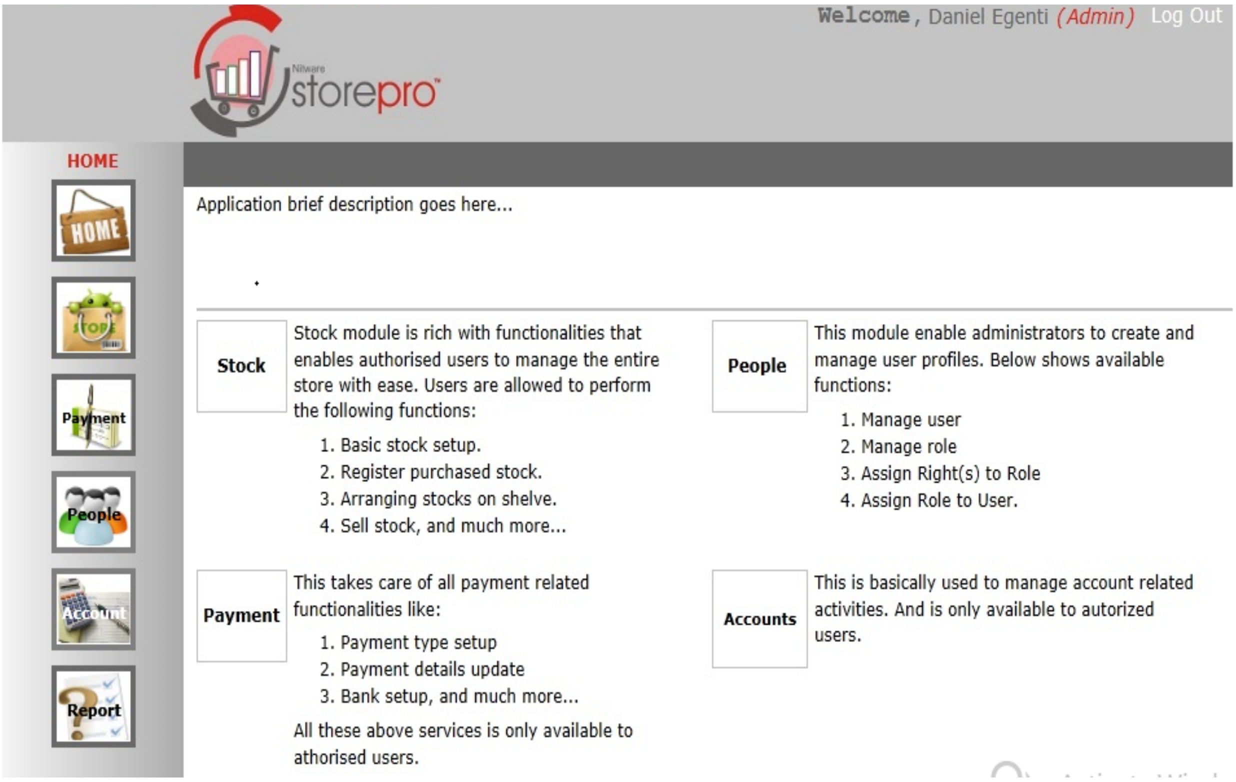


Figure 2 Storepro main page

Navigate storepro™

To enable you navigate storepro™ with ease, the fol¬lowing are required:

User knowledge

As a user, you must be familiar with the basic usage of a computer system to be able to use storepro™ effectively.

Inbuilt button

Figure 3 Three inbuilt buttons

In-built buttons appear in storepro™ pages, especially in forms in order to consolidate an action; e.g. the Save button is used to save information to the system.

Dialog box

Figure 5 Dialog box

This enables you to input information by filling out a form to trigger a consolidating action or save a list of information to storepro™.

Menu bar

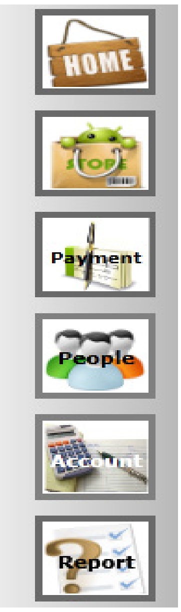


Figure 4 The Side Menu bar

This is located on the left-hand side of storepro™ main page. The principal features of the system are accessed from here.

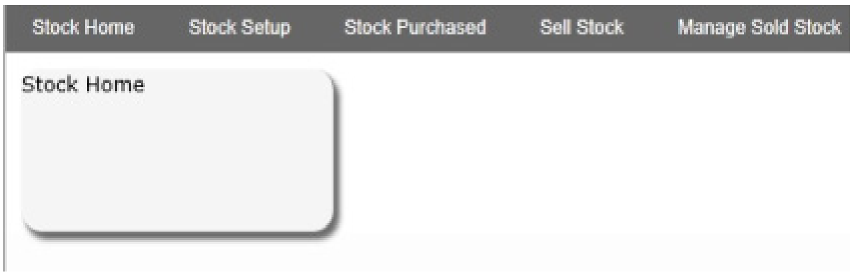


Figure 5 Top menu bar

Prompt/Message

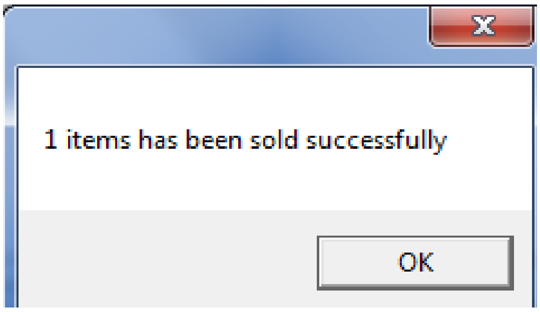


Figure 6 Message/Prompt

This is a message that appears usually when a sensitive operation is triggered in storepro™. At times too, it may be a warning. In the latter instance, you will be afforded two choices: to continue or discontinue with the triggered operation.

Calendar

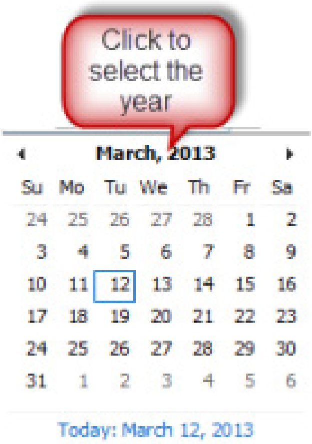


Figure 7 Calendar

Also referred to as Date-Picker, the calendar facility appears in storepro™ date fields where you will need to enter a date. Clicking the calendar icon (See Icon Key) in the date field displays a calendar for date selection. Use the single forward and back arrows < > to move back or forth the months or years. And click on any date within the calendar to make selection.

The Grid

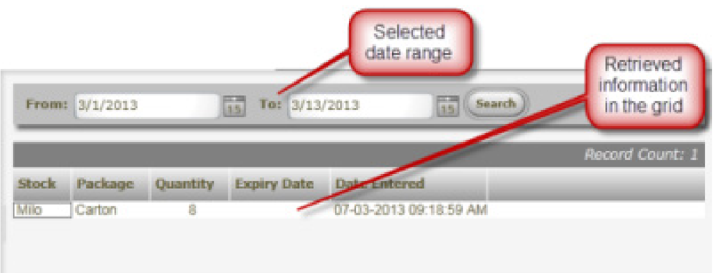


Figure 8 The Grid

The grid is the portion of storepro™ interface where the details of application items are displayed in a row and column fashion especially when they are retrieved/recalled.

Radio button

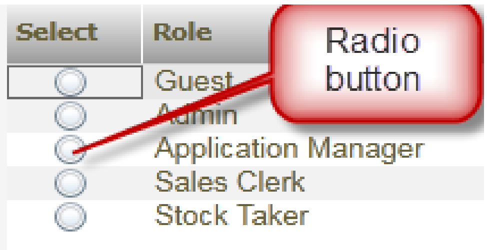


Figure 9 Radio button

The radio button appears in storepro™ pages where only one choice/selection is required.

Icon key

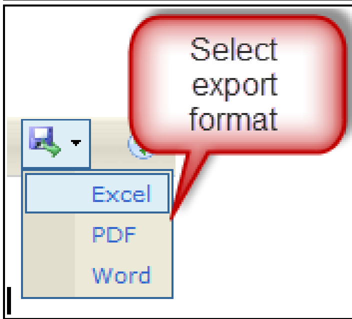
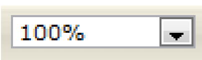
	Calendar icon in dialog box
	Export icon in report page
	First page icon in report page
	Last page icon in report page
	Next page icon in report page
	Previous page icon in report page
	Print icon in report page
	Refresh icon in report page
	Report view size icon on report page

Figure 10 Icon Key

Set Up Stock Category

This feature enables you to set up new, modify or remove existing stock category.

1. In the left menu bar, click **Stock** and select **Stock Setup** menu item from the top menu bar.
2. From the Stock Setup page, go to **Stock Category** to do the following:

Add new stock category

3. In the Stock Category page shown, enter the stock category name and description in the provided fields:

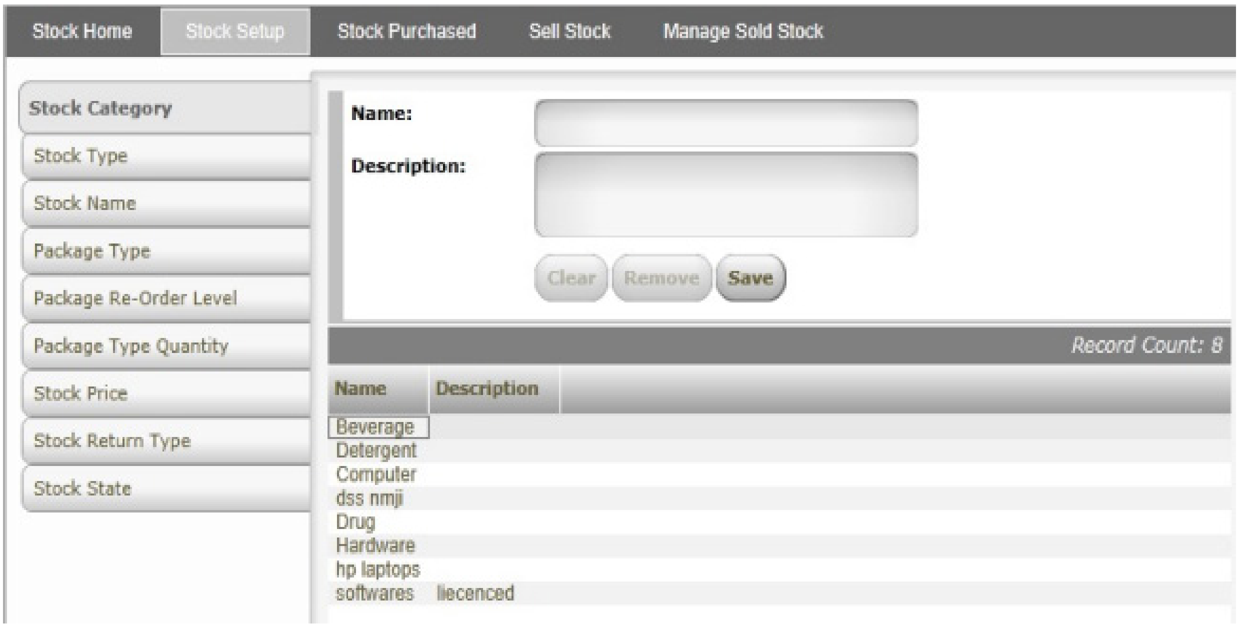


Figure 11 Stock category setup dialog box

4. Click the **Save** button to save the information. A message box confirms a successful operation.
5. Click the **Ok** button on the message box displayed. The message box closes.

The new stock category saved is added to Stock Category list. Record count is automatically increased by one.

6. You may click the **Clear** button at any time to clear the fields.

Modify stock category details

7. Click the appropriate stock category in the Stock Category list. The details are shown in the name and description fields.
8. Enter the changes and click the **Save** button.

A message box confirms a successful operation.

9. Click the **Ok** button on the message box displayed. The message box closes.

The changes automatically reflect in the stock category list.

Remove stock category

10. Click the appropriate stock category in the Stock Category list. The details are shown in the name and description fields.

11. Click the **Remove** button to remove the selected stock category. A message box confirms a successful operation.

12. Click the **Ok** button in the message box displayed. The message box closes.

The selected stock category is removed from the list. Record count is automatically reduced by one.

Set Up Stock Type

This feature enables you to set up new, modify or remove existing stock type.

1. In the left menu bar, click **Stock** and select **Stock Setup** menu item from the top menu bar.

2. From the Stock Setup page, go to **Stock Type** to do the following:

Add new stock type

3. In Stock Type page shown, enter the stock type name and description in the provided fields.

4. Select the appropriate Stock Category from the **Stock Category** field.

5. Click the **Save** button to save the information. A message box confirms a successful operation.

6. Click the **Ok** button on the message box displayed. The message box closes.

The new stock type is saved and is automatically added to the Stock Type list.

7. You may click the **Clear** button at any time to clear the fields.

Modify stock type details

8. Click the appropriate stock type in the Stock Type list. The details are shown in the name, stock type and description fields.

9. Enter the changes and click the **Save** button. A message box confirms a successful operation.

10. Click the **Ok** button in the message box displayed. The message box closes.

The changes automatically reflect in the stock type list.

Remove stock type

11. Click the appropriate stock category in the Stock Category list. The details are shown in the name and description fields.

12. Click the **Remove** button to remove the selected stock category from the system.

A message box confirms a successful operation.

13. Click the **Ok** button oi the message box displayed. The message box closes.

The selected stock category is removed from the list. Record count is automatically reduced by one.

Set Up Stock Name

Using this feature, you can set up new, modify or remove existing details of stock names of a particular stock type

1. In the left menu bar, click **Stock** and select **Stock Setup** menu item from the top menu bar.

2. From the Stock Setup page, go to **Stock Name** to do the following:

Add new stock name

3. In the stock name page shown, enter the name and description of the new stock name in the provided fields.

4. Select the appropriate Stock Type by clicking the **Stock Type** field.

5. Click the **Save** button to save the information. A message box confirms a successful operation.

6. Click the **Ok** button in the message box displayed. The message box closes.

The new stock name saved is automatically added to Stock Name list and record count is incremented by one.

7. You may click the **Clear** button at any time to clear the fields.

Modify stock name details

8. Click the appropriate stock in the Stock Name list. The details are shown in the name, stock type and description fields.

9. Enter the changes and click the **Save** button to save the modified information. A message box confirms a successful operation.

10. Click the **Ok** button in the message box displayed. The message box closes.

The changes automatically reflect in the stock name list.

Remove stock name

11. Click the appropriate stock in the Stock Name list. The details are shown in the name, stock type and description fields.
12. Click the **Remove** button to remove the selected stock. A message box confirms a successful operation.
13. Click the **Ok** button in the message box displayed. The message box closes.

The selected stock category is removed from the list. Record count is automatically reduced by one.

Set Up Package Type

This feature allows you to set up new, modify or remove existing details of package types of stock.

1. In the left menu bar, click Stock and select **Stock Setup** menu item from the top menu bar.
2. From the Stock Setup page, go to **Package Type** to do the following:

Add new package type

3. On Package Type page shown, enter the name and description of the new package type in the provided fields.
4. Click the **Save** button to save the information. A message box confirms a successful operation.
5. Click the **Ok** button in the message box displayed. The message box closes.

The new package type saved is automatically added to Package Type list and record count is incremented by one.

6. You may click the **Clear** button at any time to clear the fields.

Modify package type details

7. Click the appropriate package type in the Package Type list. The details are shown in the name and description fields.
8. Enter the changes and click the **Save** button to save the modified information. A message box confirms a successful operation.
9. Click the **Ok** button in the message box displayed. The message box closes.

The changes automatically reflect on the package type list

Remove package type

10. Click the appropriate package type in the Package Type list. The details are shown in the name and description fields.

11. Click the **Remove** button to remove the selected package type. A message box confirms a successful operation.

12. Click the **Ok** button in the message box displayed. The message box closes.

The selected package type is automatically removed from the list and record count is automatically reduced by one.

Set Up Package Re-Order Level

This feature allows you to set up new, modify or remove existing package(s) of a particular stock and their corresponding re order level.

1. In the left menu bar, click **Stock** and select **Stock Setup** menu item from the top menu bar.

2. From the Stock Setup page, go to **Package Re-Order Level**.

Add new package re order level

3. In the Package Re Order Level page shown, select the appropriate stock and package Type by clicking the **Stock** and **Package** fields respectively.

4. Enter the minimum number of stock items before re-ordering is done in the Re-Order Level field; and also, the description in the **Description** field if available. See the Figure below:

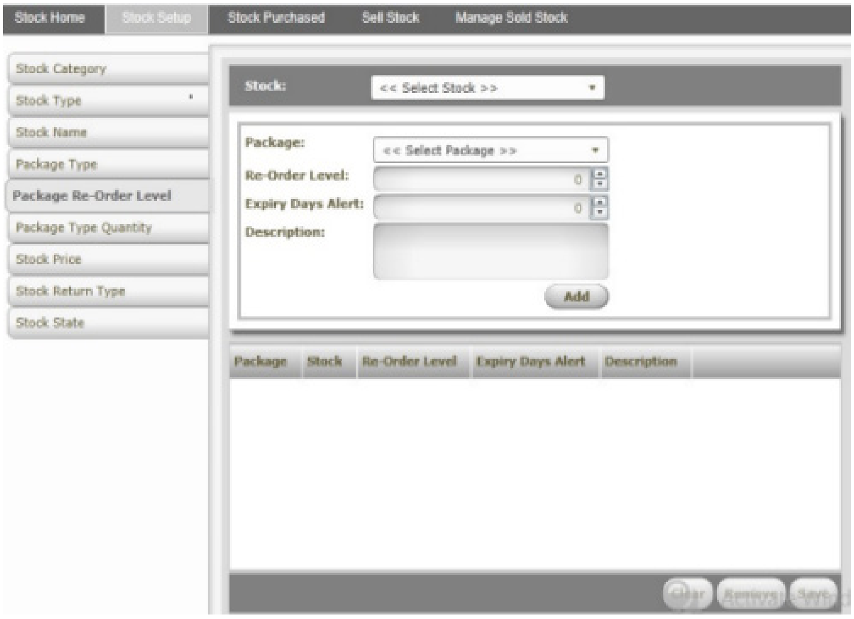


Figure 12 Package reorder level page

5. Click the **Add** button. The details entered automatically displays in Package Re-Order Level list.

6. Repeat Step 1 to 3 to add all packages available for the selected stock.

7. Click the **Save** button to save the information. A message box confirms a successful operation.

8. Click the **Ok** button in the message box displayed. The message box closes.

The new package re order level can be viewed in the Package Re-Order Level list.

Modify package re-order level details

1. Select a stock from **Stock** field. Package re-order details for the selected stock is displayed in package re-order level list.

2. Click the appropriate package re-order level in the list to select it.

3. Click the **Remove** button to remove the selected package re-order level from the list.

4. To add a new package re-order level to the list, refer to the previous section (**Add new package re-order level**, step 1 to 3).

5. Click the **Save** button to save the changes made to the package re-order level list. A message box confirms a successful operation.

6. Click the **Ok** button in the message box displayed. The message box closes.

7. You may click the **Clear** button at any time to clear the fields for new input.

Set Up Package Type Quantity

This feature is used to setup the relationship that exists between various package types of a particular stock in your store. Arranged from the largest to the smallest package type. You can set up new, modify or remove existing package type relationships.

1. In the left menu bar, click **Stock** and select **Stock Setup** menu item from the top menu bar.

2. From the Stock Setup page, go to **Package Type Quantity** to do the following:

Add new package type quantity

3. In the Package Type Quantity page shown, select the appropriate Stock. The package types for the selected stock are populated in **Package** and **Sub-Package** fields.

4. Enter the quantity of sub-packages found in package in the **Quantity In Package** field.

5. Enter the description if available in the **Description** field.

6. Click the **Add** button. The entered details automatically displays in Package Type Quantity list.

7. Repeat step 1 to 6 to add all package and sub-package relationship that exist for the selected stock.

8. Click the **Save** button to save the Package Type Quantity list. A message box confirms a successful operation. Click the **Ok** button in the message box displayed. The message box closes.

9. You may click the **Clear** button at any time to clear the fields for new input.

Re-arrange package type quantity list

10. Click the appropriate package type quantity in the Package Type Quantity list.

11. Click the **Up** button to move the selected package type quantity up on the list by one step. Rank column (first column on the list) is automatically re-numbered accordingly (e.g. from 3 to 2 or from 2 to 1 as the case may be).

12. Or click the **Down** button to move the selected package type quantity down on the list by one step. Rank column (first column on the list) is automatically re-numbered accordingly (e.g. from 2 to 3 or from 1 to 2 as the case may be).

13. Click **Save** button to save the re-arranged list. A message box confirms a successful operation.

14. Click the **Ok** button in the message box displayed. The message box closes.

The list must be arranged starting from the biggest package type on the list with a rank of 1 to the smallest package type with a rank of n + 1.

Modify package type quantity details

1. Select a stock from **Stock** field. The package type quantity details for the selected stock are displayed in the package type quantity list.

2. Click the appropriate package type quantity in the list to select it. See the Figure below:

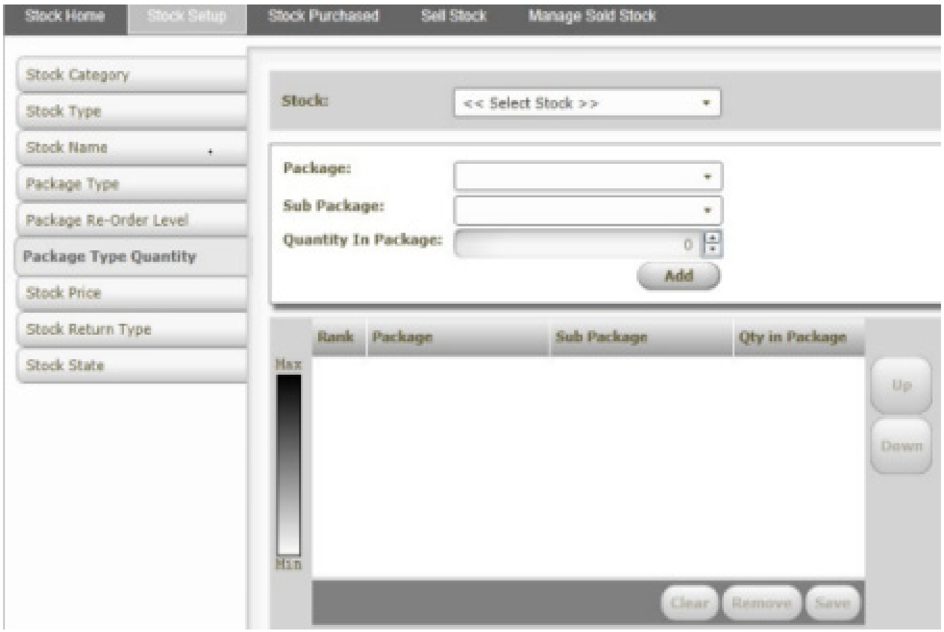


Figure 13 Package type quantity page

You can either

- Click the **Up** button to move the selected package type quantity up on the list by one step. Rank column (first column on the list) is automatically re-numbered accordingly (from 3 to 2 or from 2 to 1 as the case may be).
- Click the **Down** button to move the selected package type quantity down on the list by one step. Rank column (first column on the list) is automatically re-numbered accordingly (from 2 to 3 or from 1 to 2 as the case may be).
- Or click the **Remove** button to remove the selected package type quantity from the list.

3. To add a new package re-order level to the list, refer to the previous section (**Add new package re-order level**).
4. Click the **Save** button to save the changes made to the package type quantity. A message box confirms a successful operation.
5. Click the **Ok** button in the message box displayed. The message box closes.
6. You may click the **Clear** button at any time to clear the fields for new input.

Set Up Stock Price

This feature allows you to set up and modify existing price of stock in your store.

1. In the left menu bar, click **Stock** and select **Stock Setup** menu item in the top menu bar.
2. From the Stock Setup page, go to **Stock Price** to do the following:

Add new stock price

3. In the Stock Price page shown, select the appropriate stock from stock field. The package types for the selected stock are populated in package field.
4. Select a package from the **Package** field.
5. Enter the cost price and selling price for the selected stock and package in the **Cost Price** and **Selling Price** fields.
6. Click the **Add** button. The details entered automatically displays in the stock price list.
7. Repeat step 2 to 4 to set cost and selling price for all packages of the selected stock.
8. Click the **Save** button to save the information. A message box confirms a successful operation.
9. Click the **Ok** button in the message box displayed. The message box closes.
10. You may click the **Clear** button at any time to clear the fields for new input.

Modify stock price details

1. Select a stock from **Stock** field. Stock price details for the selected stock are displayed in stock price list.
2. Click the appropriate stock price in the list to select it.
3. Click the **Remove** button to remove the selected stock price from the list.
4. To add a new stock price to the list, refer to the previous section (**Add new stock price**).
5. Click the **Save** button to save the changes made to the stock price list. A message box confirms a successful operation.
6. Click the **Ok** button in the message box displayed. The message box closes.
7. You may click the **Clear** button at any time to clear the fields for new input.

Set Up Stock Return Type

This feature allows you to set up new, modify or remove existing details of stock return types.

1. In the left menu bar, click **Stock** and select **Stock Setup** menu item from the top menu bar.
2. From the Stock Setup page, go to **Stock Return Type** to do the following:

Add new stock return type

3. In the Stock Return Type page shown, enter the name and description of the new stock return type in the provided fields.
4. Click the **Save** button to save the information. A message box confirms a successful operation.
5. Click the **Ok** button in the message box displayed. The message box closes.

The new stock return type saved is automatically added to Stock Return Type list and record count is incremented by one.

6. You may click the **Clear** button at any time to clear the fields.

Modify stock return type details

7. Click the appropriate stock return type in the Stock Return Type list. The details are shown in the **Name** and **Description** fields.
8. Enter the changes and click the **Save** button to save the modified information. A message box confirms a successful operation.
9. Click the **Ok** button in the message box displayed. The message box closes.

The changes automatically reflect in the stock return type list

Remove stock return type

10. Click the appropriate stock return type in the Stock Return Type list. The details are shown in the **Name** and **Description** fields.
11. Click the **Remove** button to remove the selected stock return type. A message box confirms a successful operation.
12. Click the **Ok** button in the message box displayed. The message box closes.

The selected stock return type is automatically removed from the list and record count is automatically reduced by one.

Set Up Stock State

This feature allows you to set up new, modify or remove existing details of stock state.

1. On the left menu bar, click **Stock** and select **Stock Setup** menu item on the top menu bar.

2. From the Stock Setup page, go to **Stock State** to do the following:

Add new stock state

3. In the Stock State page shown, enter name, and description of the new stock state in the provided fields.

4. Click the **Save** button to save the information. A message box confirms a successful operation.

5. Click the **Ok** button on the message box displayed. The message box closes.

The new stock state saved is automatically added to Stock State list and record count is incremented by one.

6. You may click the **Clear** button at any time to clear the fields.

Modify stock state details

7. Click the appropriate stock state in the Stock State list. The details are shown in the **Name** and **Description** fields.

8. Enter the changes and click the **Save** button to save the modified information. A message box confirms a successful operation.

9. Click the **Ok** button on the message box displayed. The message box closes.

The changes made automatically reflect on the stock state list

Remove stock state

1. Click the appropriate stock state on the Stock State list. The details are shown in the **Name** and **Description** fields.

2. Click the **Remove** button to remove the selected stock state. A message box confirms a successful operation.

3. Click the **Ok** button on the message box displayed. The message box closes.

The selected stock state is automatically removed from the list and record count is automatically reduced by one.

Stock Purchase Batch

This feature allows you to add details of stock purchase.

Create new Stock Purchased Batch

1. On the left menu bar, go to **Stock** and select **Stock Purchased** menu item on the top menu bar.

2. On the Stock Purchased page displayed, click the **Stock Purchased Batch** tab. The Balance is 0 (Zero) by default:

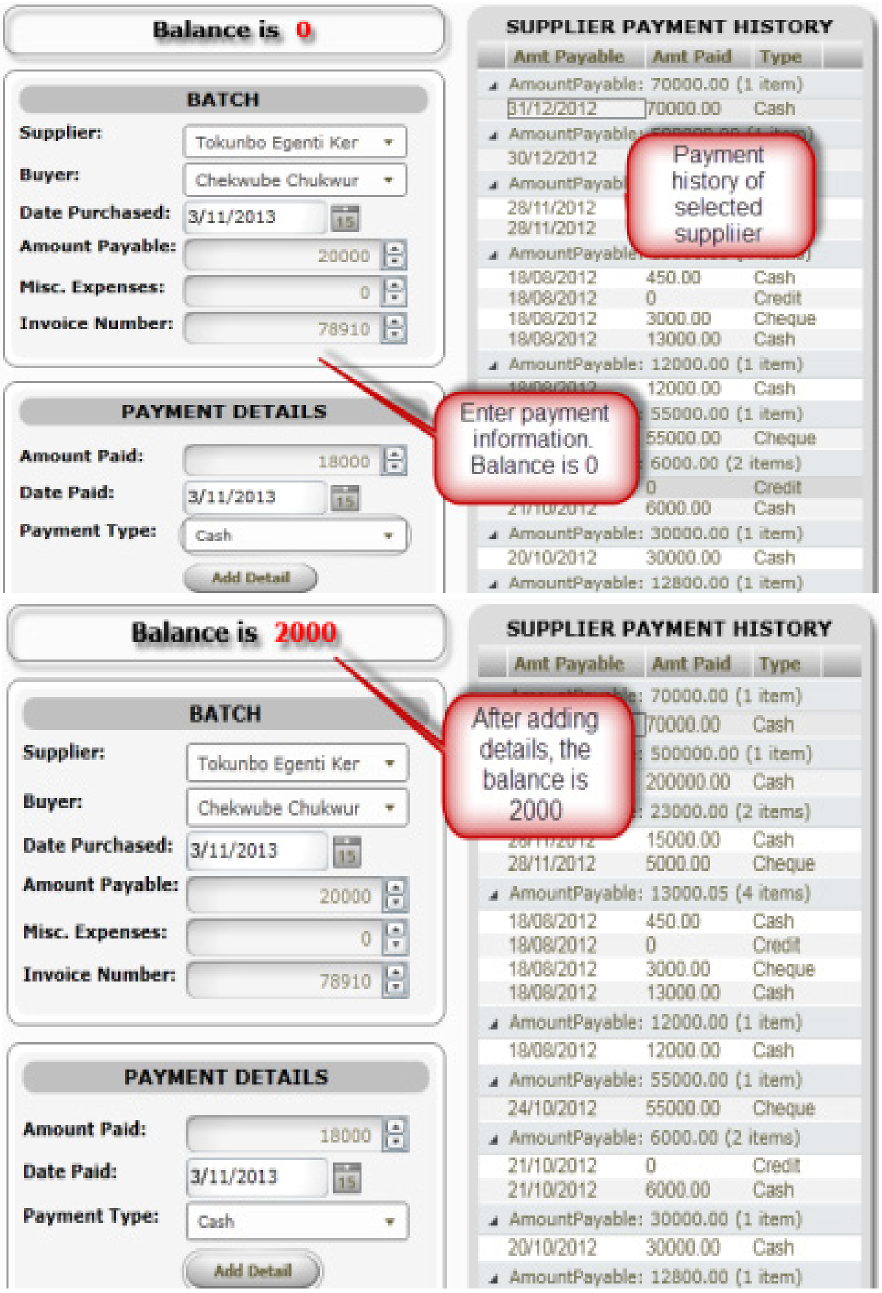


Figure 14 Stock purchased batch page

3. In the Batch panel, select the supplier, buyer and date of purchase from the provided fields. The supplier transaction history is displayed in the supplier payment history panel as shown in the figure above.

4. Enter the amount to be paid in the **Amount Payable** field. If there are expenses so far, enter the amount in the **Misc. Expenses** field. Also, enter the invoice number if available in the **Invoice Number** field.

5. In the Payment Details panel, enter the actual amount paid in the **Amount Paid** field. Click the calendar icon and select the date of payment from the calendar in the **Date Paid** field and select the payment mode from the **Payment Type** field.

6. Click the **Add Detail** button. The new balance changes depending on the amount to be paid and the actual amount paid. Also, the entered payment information can be viewed in the Payment Details Tray:

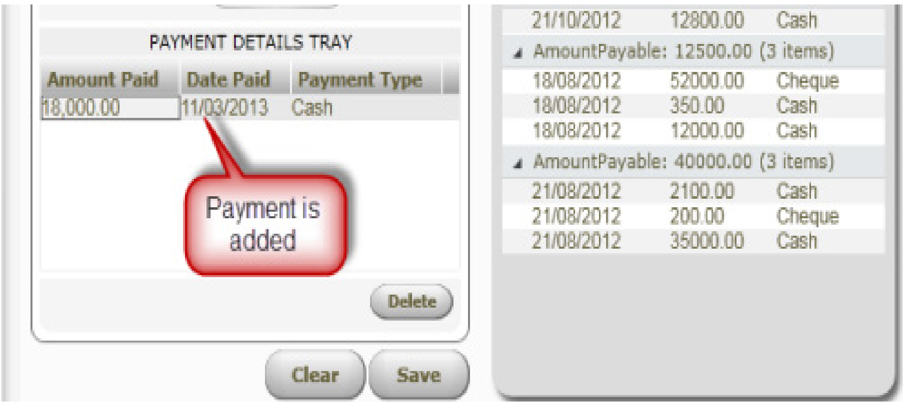


Figure 15 Stock purchase batch processed page

7. Click the **Save** button. A message confirms the successful save operation.

8. Click **Clear** button at any time to clear the fields for new input. A message confirms the successful operation.

9. Click the **Ok** button in the message box displayed. The message box closes.

10. You may click the **Clear** button at any time to clear the fields for new input.

Modify Payment Details Tray

1. Click the appropriate payment detail on payment details tray to select it.

2. Click the **Delete** button to remove the selected item from the tray. The Balance is automatically updated.

3. To add payment detail, enter amount paid, date paid and payment type in the payment details panel, then click the **Add Details** button to add it to the payment details tray.

4. You may click the **Clear** button at any time to clear the fields for new input.

Register Purchased Stock

This feature allows you to register the details of stock purchased for a specified purchase batch.

1. In the left menu bar, go to **Stock** and select **Stock Purchased** menu item on the top menu bar.
2. On Stock Purchased page displayed, click **Register Purchased Stock** to do the following:

Register new purchased stock

3. Select the purchase batch transaction from the **Purchase Batch** field. The details of the transaction are displayed in the Purchase Batch Details panel.
4. Select stock from the **Stock** field. The packages for the selected stock are populated in the **Package** field.
5. Select a package from the **Package** field. Unit cost for the selected stock and package is automatically displayed in **Unit Cost** field.
6. Enter the unit cost and quantity in the **Unit Cost** and **Quantity** fields. The total cost for the entered quantity is automatically computed and displayed in the **Cost** field:

Figure 16 Purchase stock details panel

7. Click the **Add** button to display the purchase details in the Purchased Stock Tray:

Figure 17 Purchased stock tray

8. Repeat step 2 to 6 to add more stocks to the purchased stock tray list.
9. Click the **Save** button to save the purchased stock information. A message confirms the successful save operation.
10. Click the **Ok** button in the message box displayed. The message box closes.
11. You may click the **Clear** button at any time to clear the fields for new input.

Modify existing registered Purchased Stock

12. Select the purchase batch transaction from the **Purchase Batch** field. The details of the transaction are displayed in the Purchase Batch Details and Purchased Stock panel.
13. Click the appropriate stock in purchase stock tray to select it.
14. Click **Remove** button to remove the selected item from the tray. Or click the **Clear** button to clear all purchased stock tray items for new input.
15. Repeat step 2 to 3 to remove more purchased stock from the list.
16. To add new purchased stock, refer to step 2 to 6 of the previous section (Register new purchased stock).

Modify Purchase Batch

This feature allows you to modify details of stock purchase batch.

1. In the left menu bar, go to **Stock** and select **Stock Purchased** menu item from the top menu bar.
2. From the Stock Purchased page shown, click **Modify Purchase Batch**.
3. Select a purchased batch from the **Purchased Batch** field. Purchased Batch details are displayed.
4. In the Batch and Payment Details panels, enter the required modifications in the affected fields.

5. Click the **Add Details** button. The entered payment information can be viewed in the Payment Details Tray.
6. Click the **Save** button. A message confirms the successful save operation.
7. Click the **Ok** button in the message box displayed. The message box closes.
8. Click the **Clear** button to clear the fields for new input.
9. To modify payment details, refer to **Modify existing registered purchased stock** section above.

Arrange Stock On Shelf

This feature allows you to dispatch stock for shelf.

1. In the left menu bar, go to **Stock** and select **Stock Purchased** menu item from the top menu bar.
2. From the Stock Purchased page shown, click **Arrange Stock On Shelf.**
3. Go to the Purchased Stock At Hand panel and click the arrow beside the stock to be arranged on the shelf. The stock node expands to show the packages and quantity available for the selected stock.
4. Click on any of the packages shown, the details are displayed in the Selected Purchased Stock Panel.
5. Select the Package type, Quantity On Shelf and Expiry Date from their respective fields. See the Figure below:

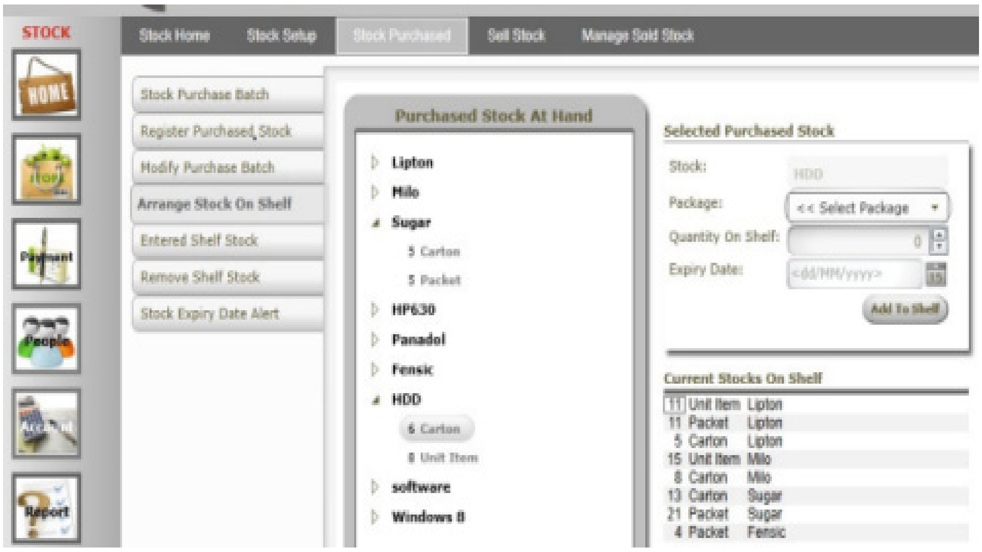


Figure 18 Arrange stock on shelf panel

6. Click the **Add To Shelf** button to save the information. A message box confirms a successful operation.

7. Click the **Ok** button in the message box displayed. The message box closes.

The added stock can be viewed in the Current Stocks On Shelf panel below the Stock Purchased interface.

View Entered Shelf Stock

This allows you to view a quick report of shelved stock that is entered in the system within a specific period.

1. In the left menu bar, go to **Stock** and select **Stock Purchased** menu item from the top menu bar.
2. From the Stock Purchased page displayed, click the **Entered Shelf Stock** tab.
3. In the page that is shown, select the start and end date from the displayed calendar by clicking the calendar icon in the **From** and **To** fields.
4. Click the **Search** button. The added stock within the entered date range can be viewed in the displayed list, with total record count:

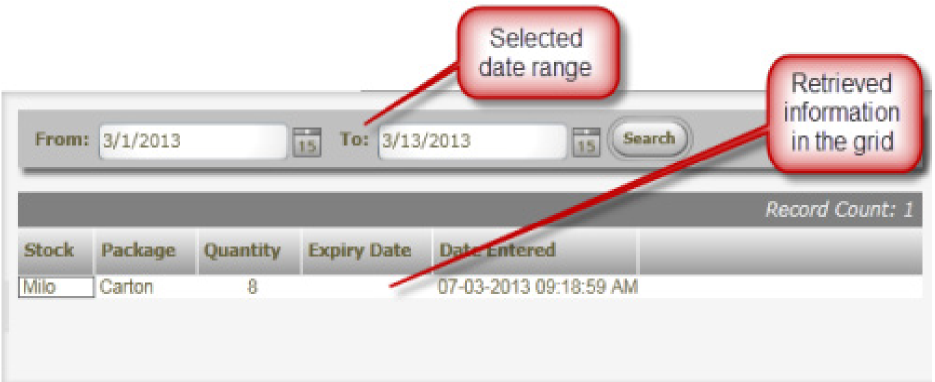


Figure 19 Stock information retrieved

Remove Shell Stock

This allows you to remove stock from the shelf.

To remove stock from shelf

1. In the left menu bar, go to **Stock** and select **Stock Purchased** menu item from the top menu bar.
2. From the Stock Purchased page displayed, click the **Remove Shell Stock** tab.
3. In the page that is shown, go to the Stock On Shelf panel and click the arrow beside the stock category. It expands to show stocks under the selected category. Click the arrow beside the stock to be removed. It expands showing the packages and corresponding quantity.

4. Click the package to remove. The details are displayed in the right-hand side panel.
5. Enter the quantity of items to be removed from the **Quantity** field if more than one.
6. Repeat step 3 to 5 to add more stocks to be removed to the list.
7. Click the **Delete** button to remove the items on the list. A message box confirms a successful operation.
8. Click the **Ok** button in the message box displayed. The message box closes.
9. You may click the **Clear** button at any time to clear the stock to be removed list. The quantity on Stock On Shelf panel is updated.

Modify items to be removed from shelf list

10. Click on the appropriate item on the list to select it.
11. Click the **Remove** Item button. The selected item is removed from the list. Item count and the stock quantities are automatically updated on the left and right panel respectively.
12. To add item to the right panel list, refer to step 3 to 5 of the previous section (to remove stock from shelf).
13. Use the Quantity field of the items on the right panel list to change the quantity if more than one.
14. You may click the **Clear** button at any time to clear the right panel list.
15. Click the **Delete** button to permanently remove the items shown on the list from shelf. A message box confirms a successful operation.
16. Click the **Ok** button in the message box displayed. The message box closes.

Sell Stock

This feature allows you to sell stocks placed on the shelf.

To sell stock

1. In the left menu bar, go to **POS**. A list of stock types is shown in the Stock On Shelf panels:

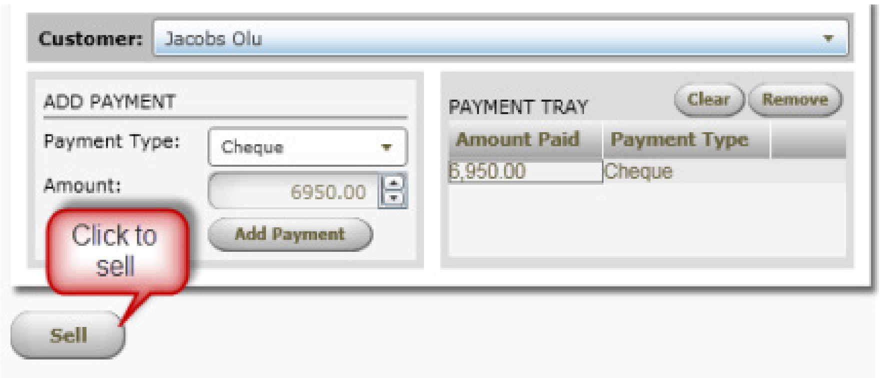


Figure 20 Stock on shelf panel with cart summary and cart item tray

2. Click the arrow icon at the left side of the desired stock type. It expands to show stocks under the clicked stock type that are on the shelf. Click the arrow icon at the left of a desired stock to be sold. It expands displaying the quantity, package types and re-order level (ROL) available for the selected stock.

3. Click on the desired package type. The details are displayed in the Cart Item panel as shown in the Figure above. The Cart Summary automatically calculates and display sub total, amount payable, net total and balance information. The quantity of the selected package type on the Stock On Shelf panel is automatically reduced by one.

4. Repeat steps 2 to 3 to add more stocks to the cart panel.

5. In the Cart Item panel list, enter the transaction discount amount if exist in the Discount field of Cart Summary panel. Enter the quantity sold for a specific item using the **Quantity** field in the Cart Item panel. The amount in the **Price** and **Total Price** fields are automatically computed and displayed.

6. Scroll down and select the name of the customer from the **Customer** field if customer is a known customer, else ignore. Select the mode of payment from the **Payment Type** field. The **Amount** field already contains the total amount payable for the transaction. The customer can be allowed to pay more or less than the transaction total amount by modifying the **Amount** field as desired.

7. Then, click the **Add Payment** button to add the payment details to the Payment Tray. If the mode of payment is selected as 'Cheque', the Payment Detail dialog box below is shown:

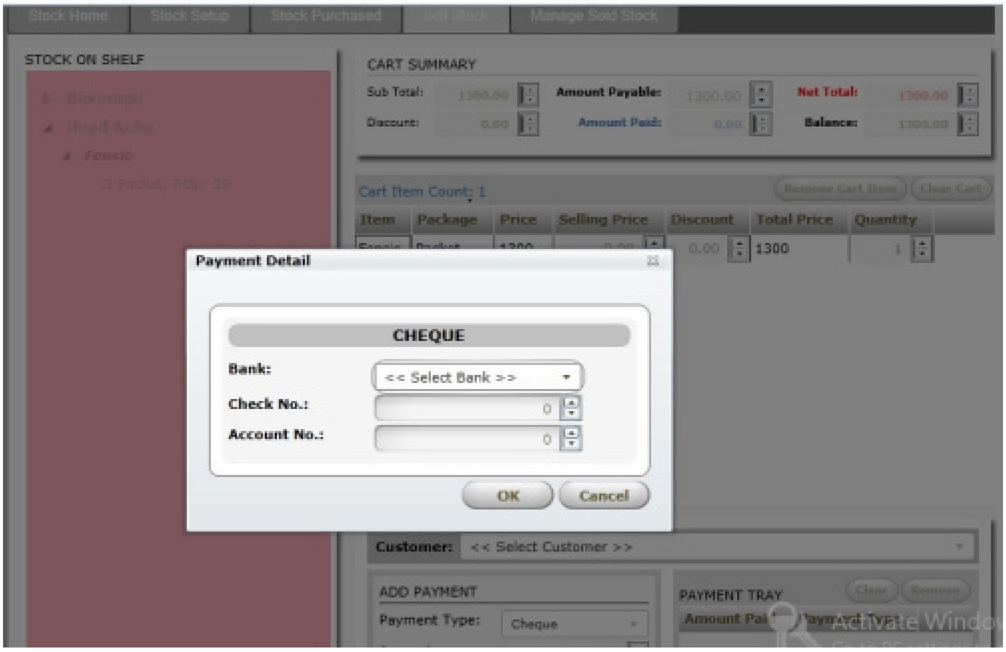


Figure 21 Payment detail panel for cheque payments

8. Enter the required information in the dialog box above and click the **OK** to continue. Payment information entered is automatically displayed in the payment tray.

9. You can also click the **Cancel** button in the Payment Detail dialog box, to cancel the addition of payment details to the Payment Tray panel.

10. Click the **Sell** button to complete the transaction. A message box confirms a successful operation.

11. Click the **Ok** button in the message box displayed. The message box closes and sales invoice is displayed.

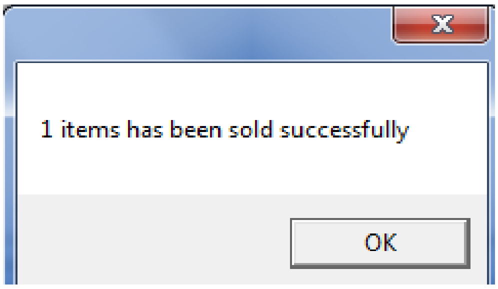


Figure 22 Success prompt

12. In the sales invoice that is displayed, click the **Print** icon (see the **Icon Key**) and follow the instruction to print if desired.

13. You may click the **Export** icon below to export the invoice to either word, excel or PDF format.

SALES INVOICE

Office Address

Phone:
Email:
Website:

Customer Name
Dele Atanda

Receipt No.: 85
Date: 12/03/2013

Item	Qty	Description	Unit Price	Discount	Amount
HP630	1	ctn	250,000.00	0.00	250,000.00
Total	1			0.00	250,000.00

Trans. Discount	0.00
Amount Payable	250,000.00
Amount Paid	250,000.00
Balance	0.00

Amount Paid in words:
Two hundred and fifty thousand naira only

Customer Sign

For:

Figure 23 Sales invoice

Modify cart item panel

1. Click the appropriate stock in the cart item list to select it.
2. Click the **Remove Cart Item** button to remove the selected stock from the list.
3. Repeat step 1 to 2 to remove more stocks from the list.
4. To add desired stock to the cart item panel, refer to step 2 to 3 of the previous section (Sell stock from shelf).
5. You can also modify selling price, discount or quantity for a particular cart item on the list, by changing the values of **Selling Price**, **Discount** or **Quantity** fields of list item. The cart summary panel details are automatically updated accordingly when this change is done. When quantity of a particular list item is changed, quantity of package type in Stock On Shelf panel is updated accordingly.
6. You can click the **Clear Cart** button at any time to remove all items from cart item list.

Modify payment tray list

1. Click on the appropriate payment on the payment tray to select it.
2. Click the **Remove** button to remove the selected item from the tray. The Balance field in the Cart Summary panel is updated accordingly.

3. To add new payment detail, enter amount paid, date paid and payment type in the Add Payment panel, then click the **Add Payment** button to add it to the payment tray.

4. Repeat step 3 to add more payments to the payment tray.

Modify Sold Stock

This feature allows you to modify already sold.

1. In the left menu bar, go to **Manage POS** menu item from the top menu bar.

2. In the page that is displayed, select the transaction to be modified from the **Sales Batch** field. The sales details are displayed in the fields of the page.

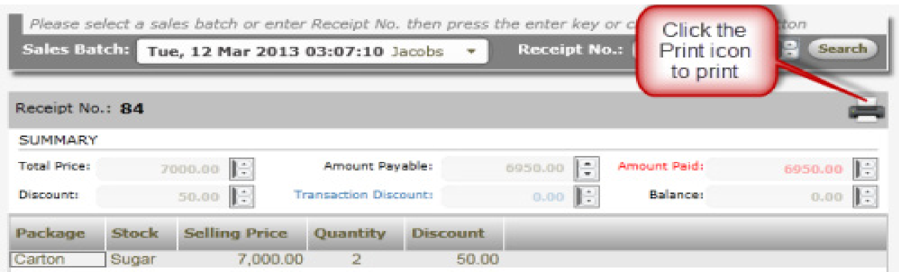


Figure 24 Manage POS page

3. Alternatively, you can enter the receipt number of the transaction in the **Receipt No** field if available, to search and retrieve the transaction details. The transaction details are displayed in the fields of the page.

4. Click the appropriate stock in the list displayed to select it.

5. Click the **Remove** button to remove the selected stock from the list. The Summary panel fields are updated accordingly.

6. Repeat step 4 to 5 to remove more stocks from the list as desired.

7. You may click the **Remove All** button to remove all items from list.

Modify payment information

8. Refer to ‘To modify payment tray’ section:

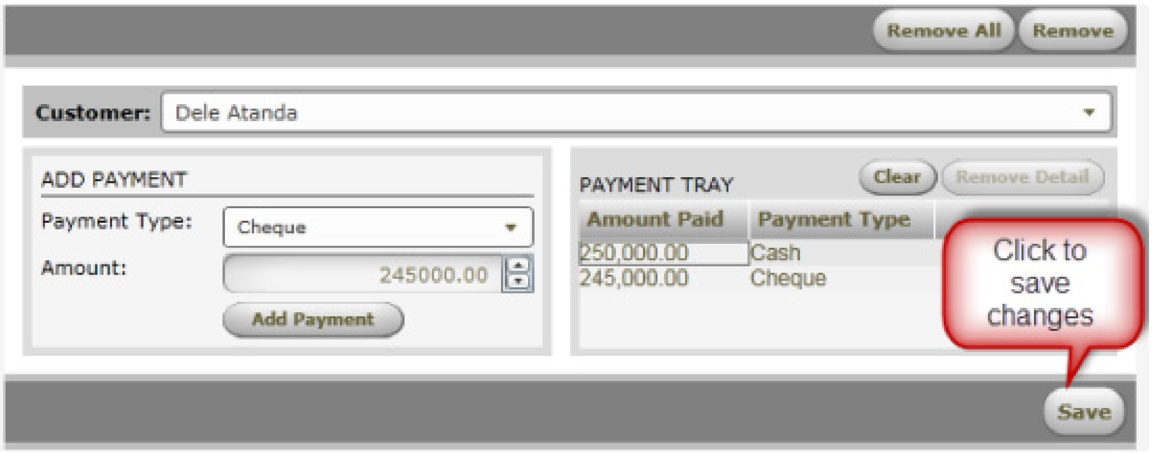


Figure 25 Modify payment panel

9. Click the **Save** button to save all the changes made. A prompt confirms successful save operation.

10. Click the **Ok** button in the message box displayed. The message box closes.

11. Click the **Print** icon to display and print the transaction invoice as shown in the Figure above.

Set Up Payment Type

This allows you to set up the payment mode used for payment.

1. In the left menu bar, click **Payment** and select **Payment Type** menu item from the top menu bar to do the following:

Add new payment type

1. In the Payment Type page shown, enter the name,and description of the new payment type in the provided fields.

2. Click the **Save** button to save the information. A message box confirms a successful operation.

3. Click the **Ok** button in the message box displayed. The message box closes.

The new payment type saved is automatically added to Payment Type list and record count is automatically incremented by one.

4. You may click the **Clear** button at any time to clear the fields.

Edit payment type details

5. Click the appropriate payment type in the Payment Type list. The details are shown in the **Name** and **Description** fields.

6. Enter the changes and click the **Save** button to save the modified information. A message box confirms a successful operation.

7. Click the **Ok** button in the message box displayed. The message box closes.

The changes automatically reflect in the payment type list.

Remove payment type

8. Click the appropriate payment type in the Payment Type list. The details are shown in the **Name** and **Description** fields.

9. Click the **Remove** button to remove the selected payment type. A message box confirms a successful operation.

10. Click the **Ok** button in the message box displayed. The message box closes.

The selected payment type is automatically removed from the list. Record count is automatically reduced by one.

Set Up Bank

This allows you to set up the bank used for cheque payments.

1. In the left menu bar, click **Payment**. Go to **Bank** menu item on the top menu bar to do the following:

Add a new bank

2. In bank page displayed, enter the name and description of the bank in the **Name** and **Description** fields:

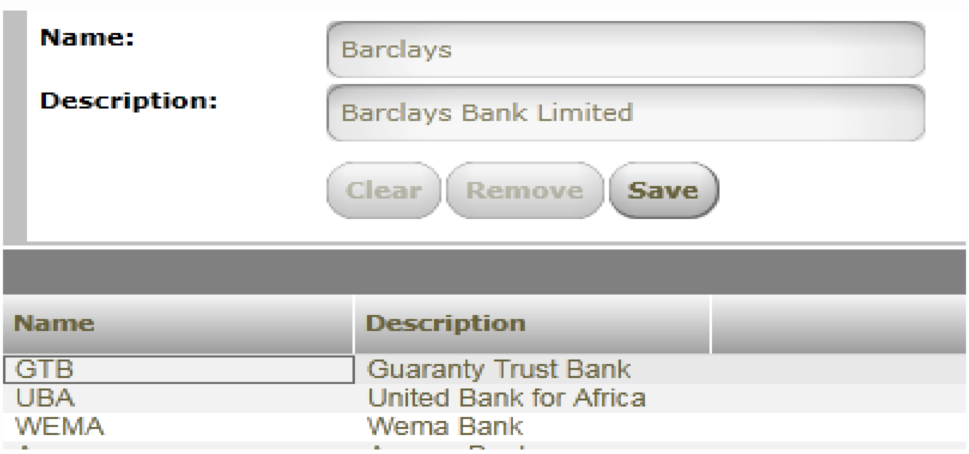


Figure 26 Setup bank page

3. Click the **Save** button to save the information. A message box confirms a successful operation.

4. Click the **Ok** button in the message box displayed. The message box closes.

The new bank can be viewed in the Bank list.

5. You may click the **Clear** button at any time to clear the fields.

Modify bank details

6. In the Bank list, click the bank to be modified to select it. The details of the selected bank are displayed in the **Name** and **Description** fields.
7. Enter the changes as desired.
8. Click the **Save** button to save the modified information. A message box confirms a successful operation.
9. Click the **Ok** button in the message box displayed. The message box closes.

The changes made automatically reflect on the bank list.

Remove bank detail

10. Click the appropriate bank in the bank list to select it. The details are shown in the **Name** and **Description** fields.
11. Click the **Remove** button to remove the selected bank. A message box confirms a successful operation.
12. Click the **Ok** button in the message box displayed. The message box closes.

The selected bank is automatically removed from the list and record count is automatically decremented by one.

Updating Payment

This allows you to update payment.

1. In the left menu bar, click **Payment**. Go to Update Payment menu item from the top menu bar.
2. In the page that is displayed, select the appropriate person and payment transaction from the **Person** and **Payment** fields. Payment transaction details for the selected person are displayed in the Payment History panel.
3. Enter the amount paid in **Amount Paid** field. Select the date of payment from the calendar by clicking the calendar icon in the **Date Paid** field, and select the mode of payment from the **Payment Type** field.
4. Click the **Add Detail** button. The new transaction and total amount added can be viewed in the New Payment Detail panel:

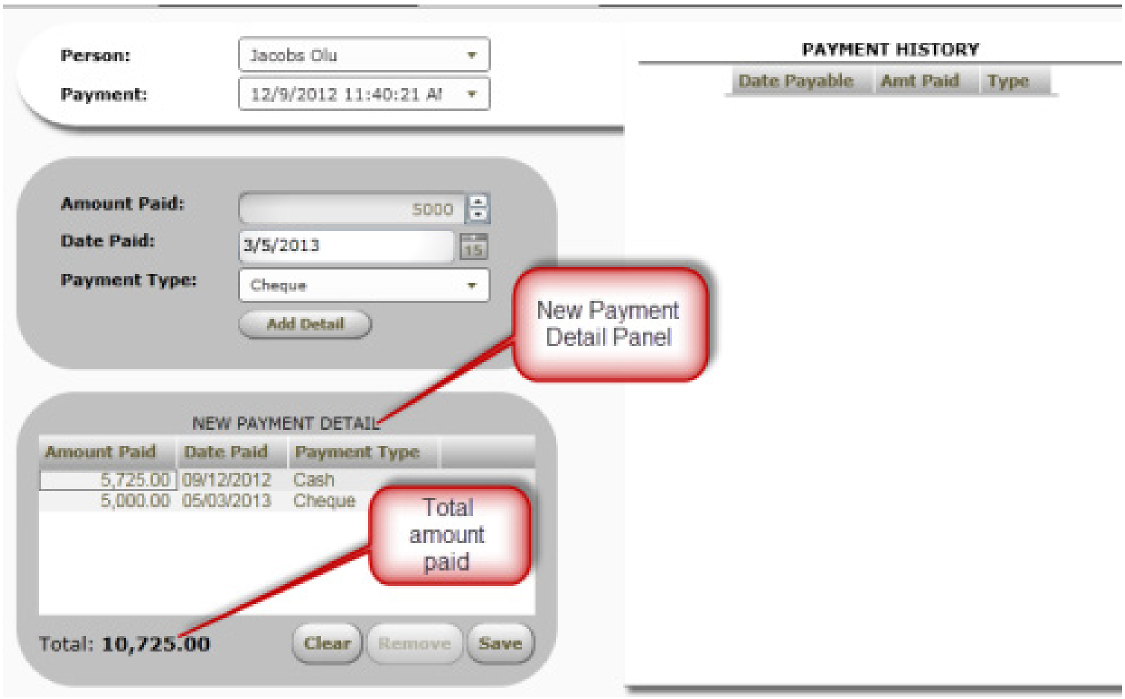


Figure 27 Update payment page

5. Click the **Save** button to save the updated payment information. A message box confirms a successful operation.

6. Click the **Ok** button in the message box displayed. The message box closes.

Set Up Person Type

This allows you to create the different types of users in the system.

1. In the left menu bar, click **People**. Go to **Person Type** menu item on the top menu bar to do the following:

Add person type

2. In the Person Type page shown, enter the name and description of the new person type in the provided fields.

3. Click the **Save** button to save the information. A message box confirms a successful operation.

4. Click the **Ok** button in the message box displayed. The message box closes.

The new person type saved is automatically added to Person Type list and record count is automatically incremented by one.

5. You may click the **Clear** button at any time to clear the fields for new input.

Modify person type details

1. Click the appropriate person type in the Person Type list. The details are shown in the **Name** and **Description** field.

2. Enter the changes and click the **Save** button to save the modified information. A message box confirms a successful operation.

3. Click the **Ok** button in the message box displayed. The message box closes.

The changes made automatically reflect on the person type list.

Set up a location

You can set up a new, modify or remove an existing location

1. In the left menu bar, click **Access Control** menu item on the top menu bar.

2. In the page displayed, Go to **Location** and enter the appropriate location name and address in the **Name** and **Address** fields.

3. Click the **Save** button to save the information. A message box confirms a successful operation.

4. Click the **Ok** button on the message box displayed. The message box closes.

The new location is automatically added to the location list, and record count label is automatically incremented by one.

5. You may click the **Clear** button at any time to clear the fields for new entry.

Modify location

1. Click the appropriate location to be modified in the Location list. The details are displayed in the **Name** and **Address** fields.

2. Enter the necessary change and click the **Save** button to save the modified information. A message box confirms a successful operation.

3. Click the **Ok** button in the message box displayed. The message box closes.

The changes made automatically reflect on the Location list.

Remove location

1. Click the appropriate location in the location list. The details are shown in the **Name** and **Address** fields.

2. Click the **Remove** button to remove the selected location. A message box confirms a successful operation.

3. Click the **Ok** button in the message box displayed. The message box closes.

The selected location is automatically removed from the list and record count is automatically reduced by one.

Set up person details

You can set up new, modify or remove person details.

1. In the left menu bar, click **Access Control** menu item from the top menu bar.

2. In the page displayed, click the **Person** tab to do the following:

Add new person details

3. In the person page displayed, enter the new person's information in all the provided fields. Select the user type and location from the **Person Type** and **Location** fields as shown below:

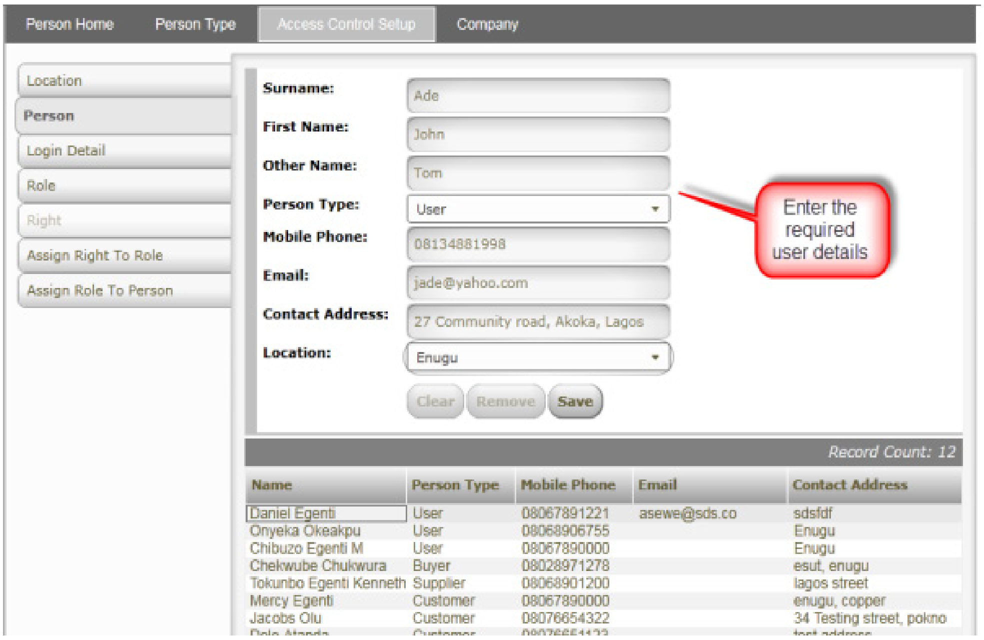


Figure 28 Person dialog box

4. Click the **Save** button to save the information. A message box confirms a successful operation.

5. Click the **Ok** button in the message box displayed. The message box closes.

The new person detail can automatically be viewed in the Person list, and Recount Count Label is automatically incremented by one.

6. You may click the **Clear** button to clear the fields' for new input.

Modify person details

1. Click the appropriate person to be modified in the Person list. The details are displayed in the page fields.
2. Enter the necessary change and click the **Save** button to save the modified person information. A message box confirms a successful operation.
3. Click the **Ok** button in the message box displayed. The message box closes.

The changes made automatically reflect on the Person list.

Remove person

1. Click the appropriate person on the person list. The details are shown in the page fields'.
2. Click the **Remove** button to remove the selected person. A message box confirms a successful operation.
3. Click the **Ok** button in the message box displayed. The message box closes.

The selected person is automatically removed from the list and record count value is automatically decremented by one.

Set up login details for a user

You can modify login details of a user.

1. In the left menu bar, click **Access Control** menu item from the top menu bar.
2. In the page displayed, click the **Login Detail** tab to do the following:

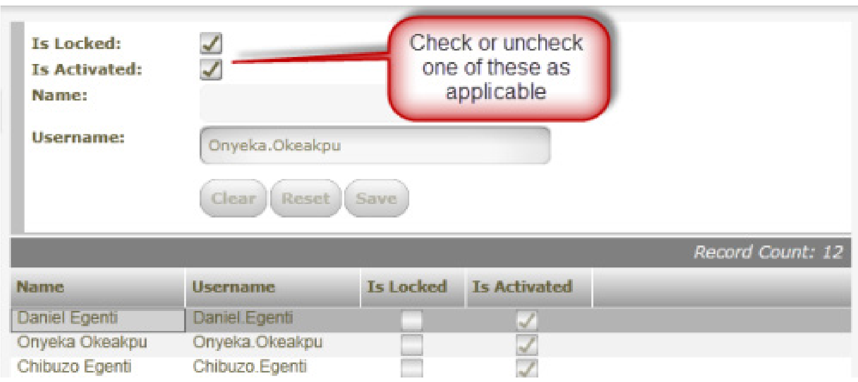


Figure 29 Person login details page

Modify user login details

1. Click the appropriate login detail to be modified in the Login Detail list. The details are displayed in the page fields.
2. Enter the necessary changes and click the **Save** button to save the modified information. A message box confirms a successful operation.
3. Click the **Ok** button in the message box displayed. The message box closes.

The changes automatically reflect on the Login Details list.

Reset login details

1. Click the appropriate login detail to be reset in the Login Detail list. The details displays on the page fields'.
2. Click the **Reset** button to reset the selected login detail. A message box confirms a successful operation.
3. Click the **Ok** button in the message box displayed. The message box closes.

The selected Login Detail is reset to its default value.

Set up a role

You can set up a new role or modify the details.

1. In the left menu bar, click on **Access Control** menu item of the top menu bar.
2. In the page displayed, click the **Role** tab to do the following:

Add a role

1. In the page displayed, enter the appropriate role name and description in the **Name** and **Description** fields. See the Figure below:

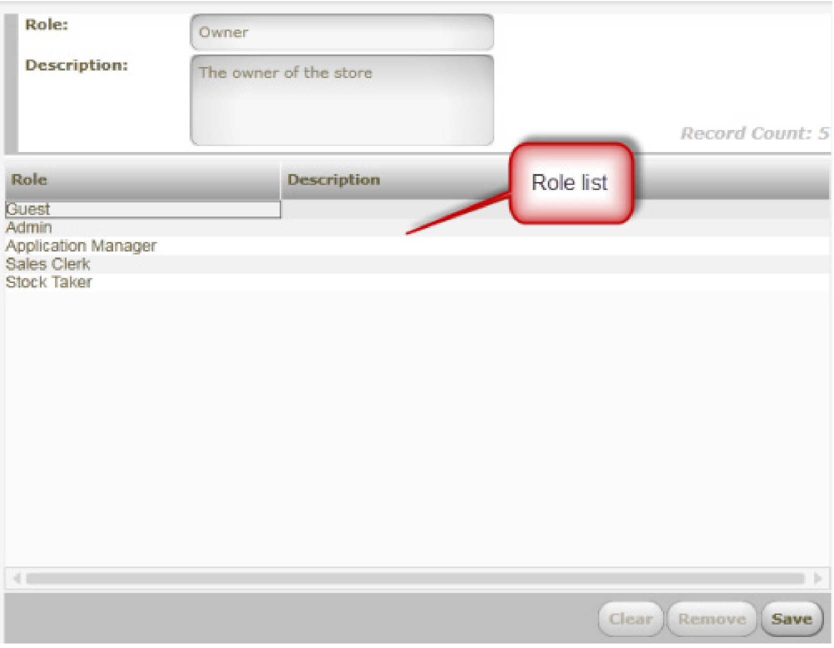


Figure 30 Role page

2. Click the **Save** button to save the entered information. A message box confirms a successful operation.
3. Click the **Ok** button in the message box displayed. The message box closes.

The newly added role can be viewed in the Role list and record count is automatically incremented by one.

4. You may click the **Clear** button at any time to clear the fields in the page.

Modify role details

1. Click the appropriate role to be modified in the Role list. The details are displayed in the page fields.
2. Enter the necessary changes and click the **Save** button to save the modified role information. A message box confirms a successful operation.
3. Click the **Ok** button in the message box displayed. The message box closes.

The changes made automatically reflect on the Role list.

Remove role

1. Click the appropriate role in the role list. The details are shown in the fields of the page.
2. Click the **Remove** button to remove the selected role. A message box confirms a successful operation.

3. Click the **Ok** button in the message box displayed. The message box closes.

The selected role is automatically removed from the list and record count is automatically decremented by one.

Assign right to role

Using this feature, you can assign right(s) to a specific role.

1. In the left menu bar, click the **Access Control** menu item from the top menu bar.
2. In the page displayed, click the **Assign Right To Role** tab to do the following:

To assign right, do the following:

3. In the page displayed, select the appropriate role from the Role field.
4. Check the appropriate check boxes to grant right(s) to the selected role. See the Figure below:

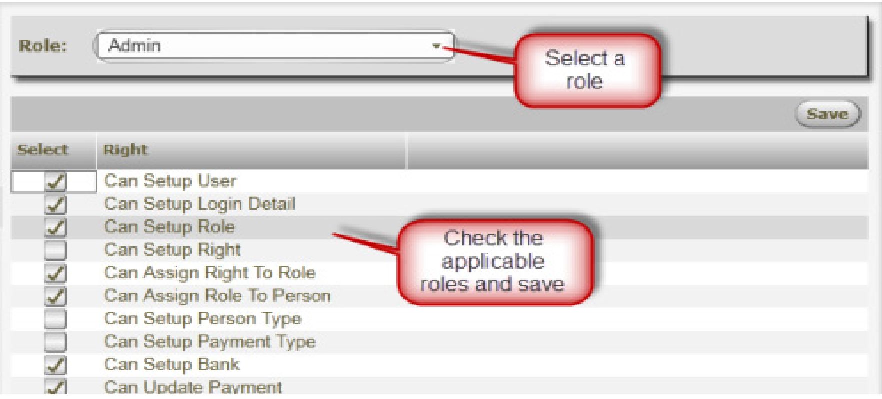


Figure 31 Assign Right to Role page

5. Click the **Save** button to save the information. A message confirms a successful operation.
6. Click the **Ok** button in the message box. The message box closes.

Modify right to role assignment

7. Re-select the role and check the check boxes beside the new right(s) to be assigned.
8. Click the **Save** button to save the changes. A message confirms a successful operation.
9. Click the **Ok** button in the message box. The message box closes.

Assign role to a person

Using this feature, you can assign a role to a specific person.

1. In the left menu bar, click the **Access Control** menu item from top menu bar.
2. In the page displayed, click on **Assign Role To Person** tab to do the following:

To assign role, do the following:

3. In the page displayed, select the appropriate user from the **User** field.
4. Tick the appropriate radio buttons to assign role from the role list to the selected user. See the Figure shown below:

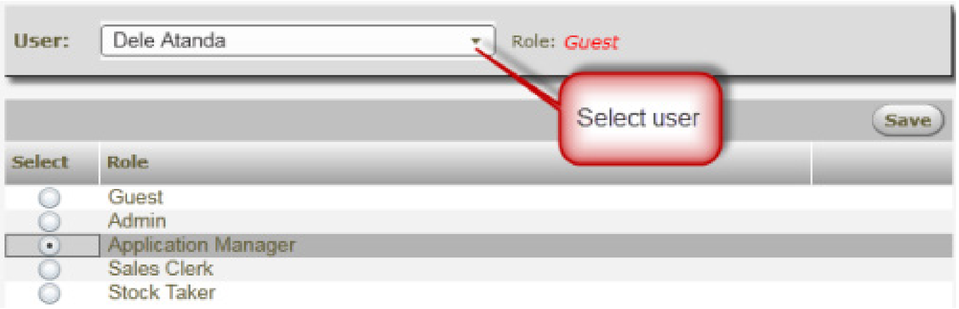


Figure 32 Assign role to person page

5. Click the **Save** button to save the information. A message confirms a successful operation.
6. Click the **Ok** button on the message box displayed.

Modify person's role

1. Re-select the user and tick the radio buttons beside the new role(s) to be assigned.
2. Click the **Save** button to save the changes. A message confirms a successful operation.
3. Click the **Ok** button on the message box displayed. The message box closes.

Set Up Company

This allows you to set up new associate company and modify details.

1. In the left menu bar, click **People**. Go to **Company** menu item from the top menu bar.

Add company

2. In the page displayed, enter the appropriate company details in the provided fields. See the Figure below:

Figure 33 Company setup page

3. Click the **Save** button to save the information. A message confirms a successful operation.
4. Click the **Ok** button in the message box displayed. The message box closes.

The new company detail is automatically added to the Company list and Record Count is incremented by one.

5. You may click the **Clear** button at any time to clear the fields of the page.

Modify company details

6. In the Company details list, click the company to be modified. The details of the company are displayed in the fields.
7. Enter the changes and click the **Save** button. A message confirms a successful operation.
8. Click the **Ok** button in the message box displayed. The message box closes.

The modified company detail can be viewed on the company details list.

Remove company

9. Click the appropriate company on the company list. The details are shown in the fields of the page.
10. Click the **Remove** button to remove the selected company. A message confirms a successful operation.

11. Click the **Ok** button in the message box displayed. The message box closes.

The selected company is automatically removed from the list and record count value is automatically reduced by one.

Set Up Company Representative

This allows you to set up a new representative of an associate company or modify details.

1. In the left menu bar, click **Company** menu item from the top menu bar.
2. In the page displayed, click the **Company Representative** tab to do the following:

Add company representative

1. In the page displayed, select the company and person from the **Company** and **Person** fields. Enter comments if any in the **Remarks** field as shown below:

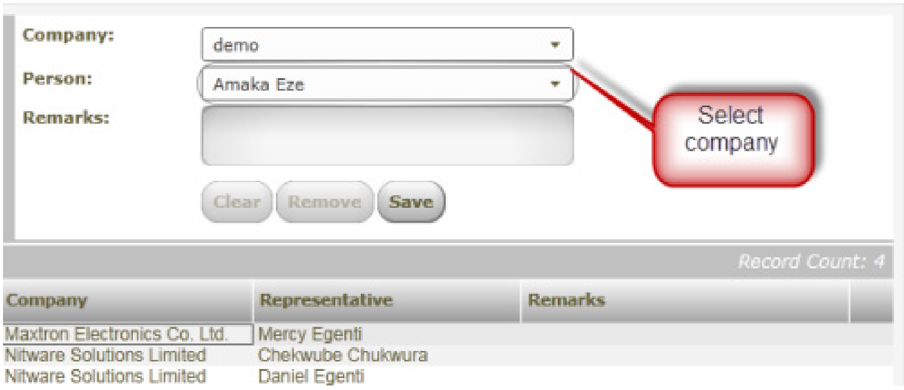


Figure 34 Company representative page setup

2. Click the **Save** button to save the information. A message confirms a successful operation.
3. Click the **Ok** button in the message box displayed. The message box closes.

The new company detail is automatically added to the Company list and Record Count is incremented by one.

4. You may click the **Clear** button to clear the page fields'.

Modify company representative details

5. In the Company Representative list, click the company representative to be modified. The details of the company representative are displayed in the page fields.
6. Enter the changes and click the **Save** button. A message confirms a successful operation.
7. Click the **Ok** button on the message box displayed. The message box closes.

The modified company detail can be viewed in the company representative details list.

Remove company representative

1. Click the appropriate company representative on the company representative list. The details are shown on the fields of the page.
2. Click the **Remove** button to remove the selected company representative. A message confirms a successful operation.
3. Click the **Ok** button on the message box displayed. The message box closes.

The selected company representative is automatically removed from the list and record count value is automatically decremented by one.

Record Expenses

This allows you to record and monitor your daily expenses. Follow the steps below:

1. In the left menu bar, click **Account** menu item from the top menu bar.
2. In the page displayed, click the **Expenses** tab.
3. In the Account Summary panel that is displayed, the opening balance and total sales are auto-generated in the respective fields.
4. Enter extra cash after sales in the **Additional Cash** field. The total amount in the **Closing Balance** field is increased by the extra cash entered.
5. Enter available cash in the **Cash At Hand** field. **Daily financial Status** field is updated to shortage, surplus or balanced.
6. In the Expenses panel, enter the name of the officer, amount and purpose of cash collection in the provided fields as shown in the Figure below:

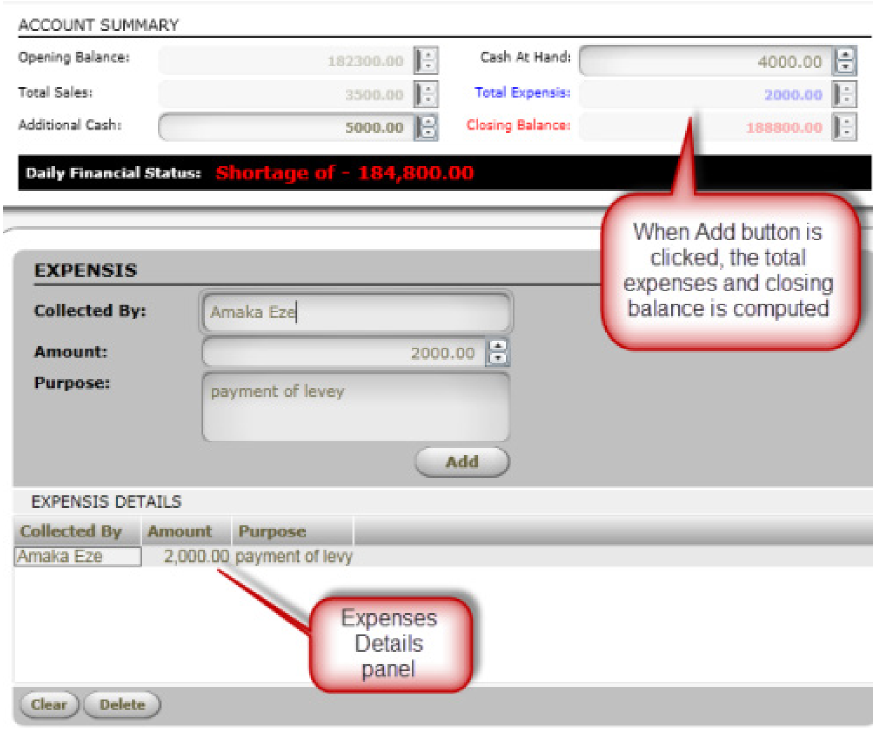


Figure 35 Expenses page

7. Click the **Add** button. The expense details are displayed in the Expenses Details panel. The Account Summary panel fields is automatically updated with the new added expenses.

8. Repeat step 6 to 7 to add more expenses.

9. Click the **Clear** button at any time to clear all fields for new input.

Modify Expenses Details panel

1. Click the appropriate expenses on expenses details panel to select it.

2. Click **Delete** button to remove the selected item from the list. The Account Summary panel field is automatically updated accordingly.

3. Repeat step 1 to 2 to delete more expenses from expenses detail list.

4. To add expenses detail, enter the name of the officer, amount and purpose of cash collection in Collected By, Amount and Purpose fields in Expenses panel.

5. Click the **Add** button to add the expenses entered to expenses details panel.

6. Repeat step 4 to 5 to add more expenses to the expenses details list.

View Reports

This allows you to view various kinds of reports, ranging from stock, sales, payment etc.

View Stock Report

This allows you to view, export or print various stock reports. See the figure below.

1. In the left menu bar, click **Report**. Go to **Stock** menu item from the top menu bar. Stock Report page is displayed.

2. Click any of the boxes or links on Stock Report page to open the appropriate report page as shown in the Figure below:

STOCK PACKAGES

Stock	Package	Re-Order Level
Fensic	Carton	5
	Packet	20
	Sachet	100
HDD	Carton	5
	Unit Item	10
HP630	Unit Item	12
	ctn	20
Lipton	Carton	20
	Packet	50
	Unit Item	100
Milk	Carton	10
	Tin	50
Milo	Unit Item	50
	Carton	12
Omo	Carton	5
	Packet	10
Panadol	Carton	12
	Packet	6
	Sachet	10
software	single	1
	No Sub-package	1
Sugar	Carton	25
	Packet	24
Windows 8	single	3
	No Sub-package	0

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Figure 36 Stock Package report

View Sales Report

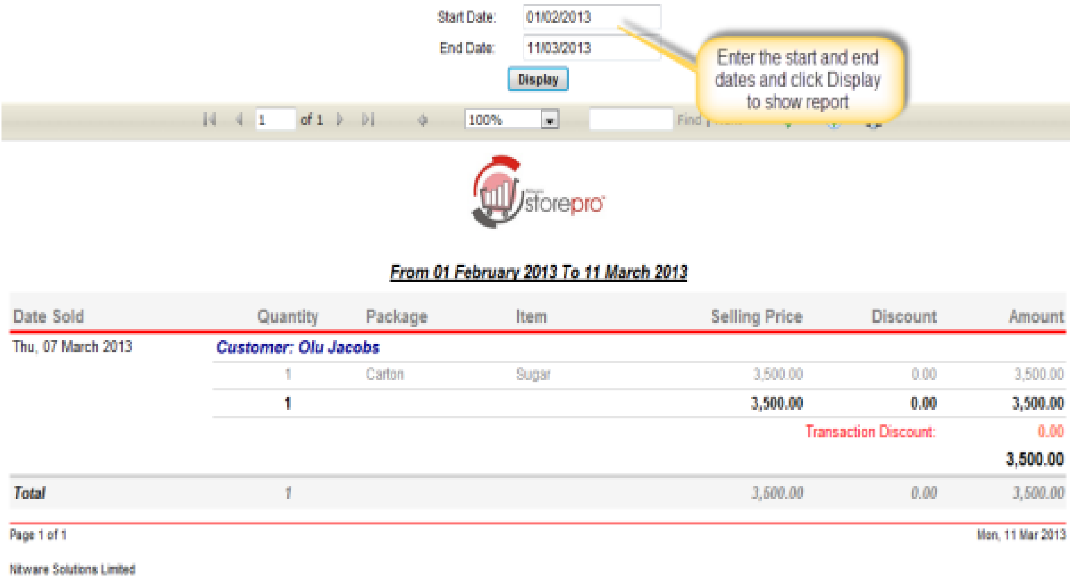
This allows you to view, export or print various sales reports of your store.

1. In the left menu bar, click **Report**. Go to **Sales** menu item from the top menu bar. The Sales report page is displayed.

2. Click any of the boxes or links on the Sales Report page to open the appropriate report page.

3. Enter the date range in the **Start Date** and **End Date** fields.

4. Click the **Display** button. The report opens. See the Figure below:



Start Date: 01/02/2013

End Date: 11/03/2013

Display

Enter the start and end dates and click Display to show report

1 of 1 100% Find

storepro

From 01 February 2013 To 11 March 2013

Date Sold	Quantity	Package	Item	Selling Price	Discount	Amount
Thu, 07 March 2013	*Customer: Olu Jacobs*					
	1	Carton	Sugar	3,500.00	0.00	3,500.00
	1			**3,500.00**	**0.00**	**3,500.00**
					Transaction Discount:	0.00
						3,500.00
Total	*1*			*3,500.00*	*0.00*	*3,500.00*

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Figure 37 Sales report