

# STOCK MANAGER ADVANCE

(V3.0.2.18 & Documentation v1.4)

Thank you for purchasing the Stock Manager Advance

First of all, we would like to apologize for delays in releasing this version 3 and would like to thank everyone who has contributed to this item, including the Envato, beta testers, technical reviewers, friends, and my family members for their love and support in my work. We also thank the purchasers who have patiently been waiting for this update and who have given me lots of valuable feedback.

## Release Candidate

As you all know it's been quite long, working on v3 and now all the feature list is implemented and being tested. Please report to [support@tecdiary.com](mailto:support@tecdiary.com) if you find any issue/error/bug.

Thank you

## Installation Instructions

Requirements: Apache 2.2+, Mysql 5.4+, PHP 5.4+

1. Copy/Upload the folder and files to your web server using cPanel or FTP
2. If you are installing in sub folder, please make sure there is no space in folder names
3. Create mysql database, database user and grant all permission to user for this database.
4. Open the **<http://yourdomain.com/pathtoupload/install/index.php>**
5. Step 1: Pre-install system checklist - If there is any issue with checklist, you will need to fix it first to proceed to next step.
6. Step 2: Provide your Envato Username and Purchase Code to validate the purchase.
7. Step 3: Provide the database host, database user, database password and database name to proceed to next step. Please make sure you don't have \$ sign in your password.
8. Step 4: Site Config: Please Fill in your SMA Base URL and select your timezone. You must check the site url as installer might guess it wrong
  - Base URL for public\_html or www/htdocs folder will be <http://yourdomain.com/> or <http://localhost/>
  - Base URL for sub-domain will be <http://subdomain.yourdomain.com/>
  - Base URL for sub-folder will be <http://yourdomain.com/subfolder/> or <http://localhost/subfolder/>
  - Base URL must not have space and it should end with a trailing slash
9. If everything goes smooth, you will be redirect to final page with login details.
10. Remove the install folder before start using the SMA.
11. Login using default username and password, and edit user to change login details.
12. SMA is ready to use. Please save system settings and POS settings before start using it.

## After Install

1. Add new owner user before editing/deleting the default owner account (we have disabled the option to edit the logged in user email and user name, you won't be able edit/delete the default user unless you are logged in with new owner account).
2. Add your currency.
3. Edit the default biller to update you company details.
4. Update the system settings, by selecting the default currency and accounting method. If you need over-selling (sell products even that are out of stock), you can only choose the AVCO as FIFO/LIFO won't work with over-selling.
5. You are ready to go, start adding categories, taxes, warehouses, products, customer, sales and purchase.

## Request Installation

We will provide the service to install the item for \$20. To request the installation, please send \$20 to [saleem@tecdiary.com](mailto:saleem@tecdiary.com) by Paypal or Skrill and email us your license file and hosting control panel details with reference of your payment to [support@tecdiary.com](mailto:support@tecdiary.com)

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## Update Instructions

Requirements: Apache 2.2+, Mysql 5.4+, PHP 5.4+

### Updating from RC3.0.1.xx/RC3.0.2.xx to latest

1. Backup all your files and database and save them.
2. Download config.php and database.php from in `yourinstallationdirectory/app/config/` or `yourinstallationdirectory/sma/config/`
3. Download the compressed config file
4. Delete all files and folders in `yourinstallationdirectory/` except **assets/** and **files/** folder to save your uploads
5. Extract the downloaded file.
6. Upload all the files and folders from extracted folder to `yourinstallationdirectory/`
7. Once all the files have been uploaded, please delete SMA3 null file from `yourinstallationdirectory/`
8. Upload the config.php and database.php save in step 2 to `yourinstallationdirectory/app/config/`
9. Please import the files **RC3.0.2.xx/files/db\_updates/** one by one starting from the next version you are updating from. Import the sql files using phpmyadmin after selecting your database.
10. Login to your site and I hope that everything will be fine.

## Updating from V2.3

We suggest you to keep the current v2.3 as it is now for reference of old sale. If you can perform fresh installation of v3 to starting using the new features would be good. We understand that there might need to update from v2.3 to v3. We are adding the update tool to perform update still you need to keep the old installation of v2.3 as reference because of the incompatibility of old files/database/features.

We have added the update tool for testing purpose and feedback only. If you are advance user and have good command and experience of backup/restore (files & database) then you can try this update tool.

Please don't try this on your production version. Backup and restore the production version to different location and then try to update that.

Requirements: Apache 2.2+, Mysql 5.4+, PHP 5.4+

### Please follow these steps to update from v2.3 to v3

1. Backup all your files and database. Save/download the backup.
2. Save/download database config file (sma/config/database.php) on your computer
3. Delete all old files/folders and upload all the new files/folders (from your downloaded file).
4. Once all the files are uploaded. We need to update the datase configuratiuon to the newly uploaded database configuration file (app/config/databse.php) form the locally saved copy of database config file in step 2. You need to updated the hostname, username, password, database and set the db\_debug to FALSE.
5. LETS UPDATE, UPDATE TOOL WON'T ASK FOR DATABASE CONFIG AS WE HAVE ALREADY UPDATED THE DATABASE SETTINGS.
6. Open the browser and type **http://yourdomain.com/pathtoupload/update/index.php**
7. Step 1: Pre-install system checklist - If there is any issue with checklist, you will need to fix it first to proceed to next step.
8. Step 2: Provide your Envato Username and Purchase Code to validate and update your license.
9. Step 3: Site Config: Please Fill in you **SMA Base URL** and select your timezone. You must check the **site url** as installation tool can guess it wrong. This is the same base\_url that you have in your old app/config/config.php file
  - o Base URL for public\_html or www/htdocs folder will be **http://yourdomain.com/** or **http://localhost/**
  - o Base URL for sub-domain will be **http://subdomain.yourdomain.com/**
  - o Base URL for sub-folder will be **http://yourdomain.com/subfolder/** or **http://localhost/subfolder/**
  - o Base URL must not have space and it should end with a trailing slash
10. If everything goes smooth, you will be redirect to final page with update complete message.
11. Remove the install and update folder from main folder before start using the SMA.

## After Update

1. Login using your old credentials.
2. You will be redirected to the database synchronization page to import/correct the database for new version. Please press the button to perform actions
  1. **Correct User Groups:** The all users are set as owner, please use this button to set the correct user group of each user.
  2. **Import Billers:** Import your Billers
  3. **Import Customers:** Import your Customers
  4. **Import Suppliers:** Import your Suppliers
  5. **Delete extra table:** You can delete all unused tables in your database

These are optional, if you need to update the records or delete old data in these tables.

6. **Update Sales Table:** To update the table paid, sale status = completed and payment status = paid
7. **Update Quotes Table:** To update the table status = completed
8. **Update Purchases Table:** To update the table paid, status = received and payment status = paid
9. **Update Transfers Table:** To update the status = completed

OR

10. **Reset Sales Table:** To reset/empty the table
  11. **Reset Quotes Table:** To reset/empty the table
  12. **Reset Purchases Table:** To reset/empty the table
  13. **Reset Transfers Table:** To reset/empty the table
  14. **Reset Deliveries Table:** To reset/empty the table
  15. **Reset Products Table:** To reset/empty the table (**You can skip this to save the old products**)
  16. **Reset Damage Products Table:** To reset/empty the table (**You can skip this to save the old data**)
3. Add your currency.
  4. Update the system settings, by selecting the default currency and accounting method. If you need over-selling (sell products even that are out of stock), you can only choose the AVCO as FIFO/LIFO won't work with over-selling.
  5. You are ready to start using new version.

## Request Update

We will provide the service to update your old SMA 2.3 to V3 for \$20 To request the update, please send \$20 to saleem@tecdiary.com by Paypal or Skrill and email us your license file and hosting control panel details with reference of your payment to support@tecdiary.com

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# HARDWARE

## 1. Receipt Printers:

We have tested the update RC3 with Bixolon SRP-350II (USB) with Web Browser Printing and Java Applet by adding qz print plugin that will support these printers

- Samsung Bixolon SRP350plus, Bixolon SRP-350II and Bixolon SRP-270.
- Telly Dascom 1125 (USB)
- Epson Thermal Printer (COM)
- Eltron P310i
- Zebra GK420, Zebra P310, Zebra LP 2844 and Zebra TLP2844
- Citizen CT-S2000 (USB)
- DOS/LPT1 Printing
- Print directly to file: i.e. \serverprinter
- Nippon Primex
- Essae PR-85j
- Bematech MP200

Bixolon printers will work fine however you might need to change some commands for other printers. Please be informed that we can't provide support regarding any issues with plug-in. You will need to manage it by yourself.

## 2. Barcode Scanners/Readers:

Any of the barcode scanners/readers will work fine with RC3 as long as it can read accurately.

## 3. Magnetic Card Readers:

Most of the Magnetic Card Readers will work fine. We have tested this with **Uniform MSR213 Magnetic Stripe Card Reader** (USB - 3 Track Reader).

For tablet/mobile card readers: No such feature and recommendation yet.

## 4. Cash Drawers:

You should buy the cash drawers that can be connected to pos printer. To use cash drawers, your printer should have the port to connect cash drawer as **Bixolon SRP350II**.

**For Browser Print**, you might need to set your printer to open cash drawer before printing.

**For Java QZ Print**, it will be fine as cash drawer will be opened with printing and can be opened without printing.

## 5. For barcode and label printing:

Any desktop laser print will work fine.

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# SUPPORT

## No Free Support anymore

**Officially, we are not providing Free Support anymore but only paid support. We will be updating the item time to time for**

- Fixes for bugs and reported issues with the item
- Updates to ensure on going compatibility and patch security vulnerabilities

## No Free Support but only Paid

- Any help for customization - (We will charge for these type of question \$5 per single question)
- No Free Installation services - (We will be charging \$20 for installation)
- No Free help in resolving compatibility issues with 3rd party plug-ins, themes or items - (We will be charging \$20-\$50 for this type of requests)
- No Free help with included 3rd party items from the 3rd party author (e.g, plug-ins and libraries used in script and theme) - (We will be charging \$20-\$50 for this type of requests)
- No Free help with your particular web hosting/server environment - (We will be charging \$20-\$50 for this type of requests)

## Paid Support Hours:

**At \$5 per email/ticket and only 1 question per email/ticket**

**From 0900 – 1800 (GMT+8), Mondays – Fridays**

**(Response time: 12 – 48 Hours)**

**No responses on Saturday, Sunday and Public Holidays in Malaysia**

If you are having any difficulty in understanding the item functionality or you have any question. Please try to have a look at FAQs, User Guide and Developer Guide and if can't find the answer in FAQs, User Guide and Developer Guide, we encourage you to contact us by emailing to [support@tecdiary.com](mailto:support@tecdiary.com)

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## Custom Modifications

Yes, we do provide customization services to modify/enhance the item functionality to suit your needs. We charge \$30 per hour. Please email to [saleem@tecdiary.com](mailto:saleem@tecdiary.com) to check availability, estimated cost and time.

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## Feature Request

Yes, we would love to listen your requests/feedback. Please prepare the details with examples before emailing to [saleem@tecdiary.com](mailto:saleem@tecdiary.com)

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# LANGUAGES

We are very thankful to these amazing people who have contributed their language files.

Available Languages (Complete/Partial)

- **English** - default language
- **Spanish** - translated by **Ricardo Ramírez R.**
- **Thai** - translated by **Mark Elayan**
- **Vietnamese** - translated by **LÊ THẾ VINH**
- **German** - translated by **Patrick**
- **Arabic** - translated by **Azmat Mehmood**
- **Turkish** - translated by **Gazoz**

If you need to add your own language that will be very easy. Please find the instructions below.

If you have translated the files and willing to contribute so that others can enjoy your generosity, please email the translated files to [support@tecdiary.com](mailto:support@tecdiary.com)

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# CREDITS

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

- **CodeIgniter** - PHP-Framework under MIT License
- **Ion\_auth** - A simple, lightweight authentication library by Ben Edmunds - Apache License v2
- **mPDF** - A PHP class to generate PDF under GNU General Public License version 2
- **Bootstrap** - Most popular HTML, CSS, and JS framework under MIT License
- **jQuery** - A fast, small, and feature-rich JavaScript library under MIT License
- **Font Awesome** - The iconic font and CSS toolkit under GPL License.
- **DataTables** - A plug-in for the jQuery - GPL v2 license or a BSD (3-point) License
- **PHPExcel** - A simple PHP to Excel conversion - GNU Library General Public License (LGPLv2.1)
- **Zend Framework 1** (barcode library) - under New BSD License
- **PHP QR Code** - Generator for 2-D QR barcode - GNU Library or (LGPLv3)
- **Bootstrap-datetimepicker** - Date and Time picker widget based on bootstrap - Apache License V2
- **Bootstrap-daterangepicker** - Date range picker component for Bootstrap under MIT License V2
- **Bootstrap 3 Lightbox** - A lightbox gallery under GNU GENERAL PUBLIC LICENSE V2
- **iCheck** - Highly customizable checkboxes and radio buttons under MIT License
- **Accounting.js** - A tiny JavaScript library for number, money and currency formatting - MIT License
- **jQuery Cookie** - A simple, lightweight jQuery plugin to manage cookies under MIT License
- **Commercial Licenses**
  - Highcharts
  - BootstrapValidator
  - Redactor Text Editor

Thanks to all the friends for their suggestions, feedback and help.

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# Frequently Asked Questions

## General

- **How many products can be managed with this Stock Manager?**

You can have any number of products ranging from 1 to 20,000 or more.

- **How to enable HTTPS support?**

You can easily enable https by editing the 2 lines in config file (app/config/config.php) as following:

1. Update base url from `http://yoursite.com` to `https://yoursite.com`
2. Set `$config['cookie_secure']` to `TRUE`

- **Can I modify the item?**

Yes, you can modify the script as per your needs and license.

We offer Regular License only that allows you to use the Item to create one single End Product for yourself or for one client (a "single application"). If you have more than once clients, you will need to purchase separate license for each client.

You can visit this link to licensing faqs page of Evnato marketplace.

- **Can I manage multiple warehouses/stores?**

Yes, you can easily manage multiple warehouse/stores with same product base.

However, if you have different products in each warehouse/store, you can add all products for each warehouse/store (combine products for all warehouse) and then manage multiple warehouse/stores.

OR

You will be buy separate license and install SMA separately for each warehouse/store.

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

Yes, you can. Please update the settings with site name and the logo can be uploaded by visiting the change logo menu link under settings.

- **How can I change the biller/invoice logo?**

Please upload the biller logo by visiting the change logo menu link under settings. Once logo upload, please edit the biller and choose new logo to update the biller.

- **How can I translate into other language?**

You can easily add new languages to SMA. Please click here to jump to guide.

- **Can I install this item on localhost with wamp/xampp/easyphp?**

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

- **Does it support my barcode scanner/receipt printer/magnetic card reader?**

Please click here to jump to hardware section.



- **Will I get the full source code?**

Yes, you will get 100% source code including php, js, html and css.

- **Can I modify it as per my needs?**

Yes, you modify it as per your need and license.

- **Are you using a PHP Framework for this item?**

Yes, **CodeIgniter** – PHP Framework created by EllisLab and is now a project of the British Columbia Institute of Technology.

- **How do SMA handle out bounds?**

Products will be automatically subtracted from the warehouse quantity once the invoice created with completed sale status. Sale with pending status will not change the quantity.

- **How do SMA handle in bounds?**

New Purchase will automatically add/increase the product quantity in the selected warehouse.

- **Why I can sell the products even if I don't have stock in warehouse?**

Please check the overselling option in system settings, that would be enabled. You can disable overselling to stop selling products with 0 or lower stock.

- **Why the products price is different on sales page?**

Please check the customer group and products tax.

- **What is the mPDF password to edit the pdf documents?**

We haven't set any password. You can set it as you like. You can set password by editing the `app/libraries/sma.php` around line no 217 `$pdf->SetProtection(array('print'))`; replace with `$pdf->SetProtection(array('print', 'user_password', 'owner_password'))`; If you need more information, please visit mPDF documentation.

- **How can I set the theme style?**

Not every theme will have different style option, the default theme has 3 menu color styles and can only be chosen from the top bar.

- **What is the difference between inclusive and exclusive tax on add product page?**

Inclusive tax method means that tax is already included in the price. Exclusive tax method means that tax is not included in the price and should be calculated/added separately.

For example:

Product Price 100 and Tax 10%

Inclusive tax method: Price 90.91 and Tax amount: 9.09 = 100 (total price with tax)

Exclusive tax method: Price 100 and Tax amount: 10 = 110 (total price with tax)

- **Where are the header and footer view files?**

The header and footer files are in `themes/default/views/`

- **How can I change Quick Cash buttons?**

Please modify the `pos_lang.php` in `app/language/english/`. If you are not using English, then see the file in `app/language/yourLanguageFolder/`

- **Why POS brings me to Java page OR my browser keeps blocking the Java?**

If you have enable the Java applet and added your domain to Exception Site List as said in the POS settings page.

- You are being redirect to Java page, please download the new Java installer and install it.
- Your browser blocking the Java applet even if you have already added the domain to Java Exception Site List, please allow it in your browser.
- You get qz plug-in not loaded error message, please check if the browser is not blocking the Java. Restoring the security prompts in Java Security might help.
- Browser keep loading the page and never stop, your java is stop responding, please open task manages and kill jpzlauncher.exe/Java/Plugin Container and reload the page. If still same, please Restoring Security Prompts in Java Security settings.

**You think, this is giving too much trouble, please disable the Java applet in POS settings and let browser handle printing.**

- **Why barcode images are not showing on print barcode and label page?**

Please check that ini\_set function is not disabled. The ini\_set function should be enabled to use barcode feature.

- **How can I set the reference numbers to start from my own number?**

Please go to phpmyadmin, select your database, select the order\_ref table and here you can set your own number. You need to change

- **so** : To change the sale orders reference number.
- **qu** : To change the quotations reference number.
- **po** : To change the purchase orders reference number.
- **to** : To change the transfer order reference number.
- **pos** : To change the pos sale reference number.
- **do** : To change the delivery order number.
- **pay** : To change the payments reference number.
- **re** : To change the return sales reference number.

This is useful for first time and these will be automatically reset with corn job depending your reference format in system settings.

- **How does discount apply to the products and order?**

**Product level discount** will be applied on the product price before any tax calculation. i.e, Product Price - Product Discount + Product Tax (product tax calculated on Product Price - Product Discount)

**Order level discount** will be applied on the order total (total + product price) before any order tax calculation. i.e, Order Total - Order Discount + Order Tax (order tax calculated on Order Total - Order Discount)

- **What files I need to edit if I have moved to different server and/or domain?**

**Same url (domain):** You will need to update the database configuration in app/config/database.php

**Different url (domain):** You will need to update the base\_url in app/config/config.php and database configuration in app/config/database.php

- **Can I integrate SMA with third party software like wordpress/magento?**

**No**, there is no option to integrate SMA with any third party scripts/software. We have plan to add API modules after the release of v3 (Stable), then will work on the plug-ins/extensions to integrate SMA with other software.

- **Can I disable print dialog after submitting the sale on POS?**

**Yes, by modifying a line of code**, please open themes/default/views/pos/view.php and search for window.print(); remove/comment it to disable print dialog.

- **Can I auto redirect back to POS after submitting the sale on POS?**

**Yes, by modifying a line of code**, please open app/controllers/pos.php and search for redirect("pos/view/" . \$sale['sale\_id']); replace it with redirect("pos"); Now after sale, system will redirect you back to POS instead of view receipt page.

- **Why reference number is not auto generated while adding sale/purchase and other?**

**Please leave reference field empty/blank, system will generate reference automatically after submit.** This is to avoid the same reference number issue when add records same time.

- **What does "Clear all locally saved data" button do?**

**Clear your localStorage**, if you have added any item to purchahse, transfer, quote, pos or sale, those all will be cleared.

- **How can I setup customer display in POS?**

You can click the view bill icon in topbar at pos screen and then display it to your 2nd monitor. Here is the guide to setup dual display.

- Setting Up Dual Monitors on Windows
- Set up Dual monitors on Windows laptop
- Set up Dual Displays on Mac
- Connect Multiple Monitors to MacBook Pro / Air

- **Can you please explain Inventory Accounting (FIFO/LIFO/AVCO)?**

#### **First-in-first-out (FIFO)**

Defined: The oldest inventory asset is recorded as sold first – regardless of the actual shelf-age of the given physical asset.

Applied: While it is the most widely used accounting technique in periodic inventory management today, FIFO may fail to offer a full picture of inventory value if inflation and price increases are not closely analyzed. Thus, FIFO may inflate or deflate the actual value of future inventory.

#### **Last-in first-out (LIFO)**

Defined: The newest inventory asset is recorded as sold first.

Applied: The LIFO method could reduce a company's tax responsibility in times of growing inflation – but it has been heavily regulated under the International Financial Reporting Standards.

#### **Average cost or weighted cost (AVCO)**

Defined: The AVCO (average cost) method will take the total cost of goods still available for sale and divide it by the total sum of product from the beginning inventory and purchases.

Applied: With the AVCO method, cost flow is determined as a weighted average of all total unit costs.

- **When and where the inventory accounting method is used to calculate costing?**

The balance quantity and costing will be calculated on sale in the site model  
(app/models/site.php)

- **Why I have cron job warning/message in system settings?**

That is informational message to set the cron job.

If you have already set the cron job, then just ignore it.

- **Why I need to set cron job?**

Cron job will perform these tasks

- Reset reference numbers
- Set the payment status to overdue after payment term for pending and partial paid sales/purchases
- Delete expired products (disable/enable this in settings)
- Expire product promotions after end date
- Delete older login records
- Check if updates are available

- **How can I setup cron job locally on windows?**

You can create task in windows Task Scheduler.

- Download wget setup from <https://sourceforge.net/projects/gnuwin32/files/wget/> and install it in C:\GnuWin32\
- Open Task Scheduler (Control Panel > System and Security > Administrative Tools > Task Scheduler OR run: control schedtasks)
- Create a Basic Task, then select Daily, then select Time, then Start a Program and then
- Program/Script: browse to select wget.exe (C:\GnuWin32\bin\wget.exe)
- Add Arguments (optional): -q -O NUL  
replace\_this\_with\_cron\_job\_url\_from\_settings\_page\_here (<http://localhost/sma/cron/run>)
- Start in (optional): path to wget folder (C:\GnuWin32\bin\)
- Finish to complete the wizard. You can see your task in Task Scheduler Library.

For emails, you should have setup your email server. If not, you can try searching Google or check out this gist Email Server (Windows Only).

## Account and Users

- **What type of account are available?**

These are the account type

1. Management or Staff
  1. Owner
  2. Admin
  3. You can add more user groups for your settings and set permissions to any of these groups.

2. Customer
3. Supplier

- **What user groups available?**

These user groups are fixed and can't be changed.

1. Owner
2. Admin
3. Customer
4. Supplier

You can add more user groups for your settings. These all groups will be considered as staff groups and you can set permissions to any of these groups.

- **User forgot his/her password. How do I reset it?**

For Staff: Please visit list user and edit the user to reset the password. For Customer/Supplier: Please visit list customers/suppliers and then click the users' icon to list the user for selected customer/supplier. You can edit any user to reset password.

- **How do I delete account?**

If you want to delete account for staff member, please visit list users sub menu under people main menu. All the accounts are listed on this page and you can delete any of them.

If you want to delete any account customer/supplier account, please visit list customers/suppliers sub menu under people main menu. All the customers/suppliers are listed on this page. Now click the users' icon to list the account for the customer/supplier. On this window, you can delete any account for this customer/supplier.

If you delete any customer/supplier, all the account attached with the customer/supplier will automatically deleted.

## Payments

- **What payment gateways are available in SMA?**

Payment options available for customers to choose from are as following:

1. Paypal
2. Skrill

Payment options has been added to RC3 that will be available to customers when you email invoice to them. Customers would be able to make payment by this gateway using link in email and from front-end (once available).

*There is no payment option available in V2.3*

- **What payment gateways are available in POS Module for SMA?**

Payment options available to process the credit card for POS Modules are as following:

1. Paypal Pro
2. Stripe
3. Authorize.net

Payments will be proceeded after you submit the sale from POS and this could take a few second extra then the normal POS sale.

*There is no payment option available in V2.3*

- **Can I have recurring invoice or subscription?**

No, currently there is no such feature available yet.

- **Why did my PayPal Pro or Stripe payment take long time?**

API calls to both server could take few seconds as the payment is processed after submit.

- **Will you be adding more payment gateways?**

Yes, we will be exploring the new gateways.

- **Paypal Pro and Stripe gateways are added to SMA or POS?**

Paypal Pro and Stripe gateways are only available with POS Module. If you have purchase SMA with POS Module. These are already included in you POS.

If you have purchase Stock Manager Advance only, then you don't have the Paypal Pro and Stripe gateways but only the Paypal and Skrill button on email and client portal.

- **How the deposit payment type works?**

Please visit the customer listing page to check the deposit amount and add new deposits to any customer.

On sales, you can use the deposit in paid by and system will automatically deduct the sale amount from customer's deposit amount.

## Errors

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

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

Updating your Anti-Virus and Browser might help. You can check with your host too.

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

- **Why I am getting "No input file specified" error after install/update?**

Please add ? 'question sign' after index.php in the .htaccess file, you line will be look as RewriteRule ^(.\*)\$ /index.php?\$1 [L]code.

For more information, please visit this guide page.

- **Why all Ajax calls are being failed?**

I guess, you have changed the index\_page in config file, please set it back to blank string and then if you have any issue (such as No input file specified above), please solve it with the help of .htaccess file.

- **Why I am getting "Ajax request failed"?**

I guess, you have changed the `index_page` in config file. Please change it back, to blank and then resolve your issue with the help you `.htaccess` file. Mostly you do this because of No input file specified error and the solution is in the faq above.

- **Why the installer/update tool is locked?**

After successfully installation/update, the installer/update tool will be automatically locked.

If you having any issue after installation or like to perform the installation again, please upload the files again.

- **Why am I getting 404/500 error page after installation?**

Please

1. make sure that your apache `mod_rewrite` is enabled
2. check that `.htaccess` file is successfully uploaded and exists in the main directory of SMA
3. `base_url` in `app/config/config.php`
4. check your database settings in `app/config/database.php`
5. check your folders/files permissions (folders should have 755 and files should have 644 permissions).

If you are using godaddy, please visit the codeigniter official guide here. You might need to check and modify you `.htaccess` files too.

You can always check your error log to get more information about the issue.

- **Why sale time is different from my computer time?**

The time with Javascript and PHP could be different as javascript use your computer time but php will use your server time.

Please check your timezone in `index.php` and make sure that you have set the correct time zone. You can find your timezone at <http://php.net/manual/en/timezones.php>

- **Why I can't download the pdf?**

We have used mPDF library to generate pdf files. We have tested mPDF library on 5 different servers. Yes, it is a bit slower but do the amazing job to convert html to pdf. You can check with your host about this and if you need requirement, please click here

Please increase the memory limit to 128MB as mPDF needs quite a lot memory to generate pdf files.

- **Why I can't send emails?**

We have tested the email function on different hosting servers. Please check with your host about this and if you need to check the code that will be in `app/libraries/sma.php` and look for `send_email()`

- **Why I can't login and getting time out error?**

Timeout feature has been enabled. The user will be timed out after 3 unsuccessful login attempts for 10 minutes. You can disable this in `app/config/ion_auth.php` by changing the `$config['track_login_attempts'] = TRUE;` to `$config['track_login_attempts'] = FALSE;` or you can increase the attempts from 3 to any number you like.

- **Why I getting db error and can't login?**

Please check your db configuration in `app/config/database.php`

- **Why I can't upload any file and the Barcode & QRCode images are not showing?**

This could be due to permission on the assets/uploads. Please set 777 permissions to assets/uploads and all other folder in the assets/uploads/

- **Can I use this on Windows server with IIS?**

Yes, but we haven't tested this and don't provide any support for setup.

If URL Rewrite module is not installed, please install it from here

<http://www.iis.net/downloads/microsoft/url-rewrite>. Please check the complete web.config file.

Place this in the main installation folder where the index.php is placed.

```
<?xml version="1.0" encoding="UTF-8"?>
<configuration>
  <system.webServer>
    <rewrite>
      <rules>
        <rule name="Imported Rule 1" stopProcessing="true">
          <match url="^(.*)$" ignoreCase="false" />
          <conditions logicalGrouping="MatchAll">
            <add input="{REQUEST_FILENAME}" matchType="IsDirectory" negate="true" />
            <add input="{REQUEST_FILENAME}" matchType="IsFile" negate="true" />
          </conditions>
          <action type="Rewrite" url="index.php?url={R:1}" appendQueryString="true" />
        </rule>
      </rules>
    </rewrite>
  </system.webServer>
</configuration>
```

- **Can I use this with NGINX?**

Yes, but we haven't tested this and don't provide any support for setup.

You can follow the guide <http://wiki.nginx.org/Codeigniter>. Your nginx.conf file will look like this.

```
server {
    server_name domain.tld;
    root /var/www/codeignitor;
    index index.html index.php;
    # set expiration of assets to MAX for caching
    location ~* \.(ico|css|js|gif|jpe?g|png)(\?[0-9]+)?$ {
        expires max;
        log_not_found off;
    }
    location / {
        # Check if a file or directory index file exists, else route it to index.php.
        try_files $uri $uri/ /index.php;
    }
    location ~* \.php$ {
        fastcgi_pass 127.0.0.1:9000;
        include fastcgi.conf;
    }
    location ~ /files {
        deny all;
        return 404;
    }
}
```



- **Why some products are missing from order when I add 100+ products?**

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

- **Why I am getting "A problem was encountered while attempting to move the uploaded file to the final destination" error?**

Please make sure that **php safe mode** is disabled. If it's already disabled, please check with your host.

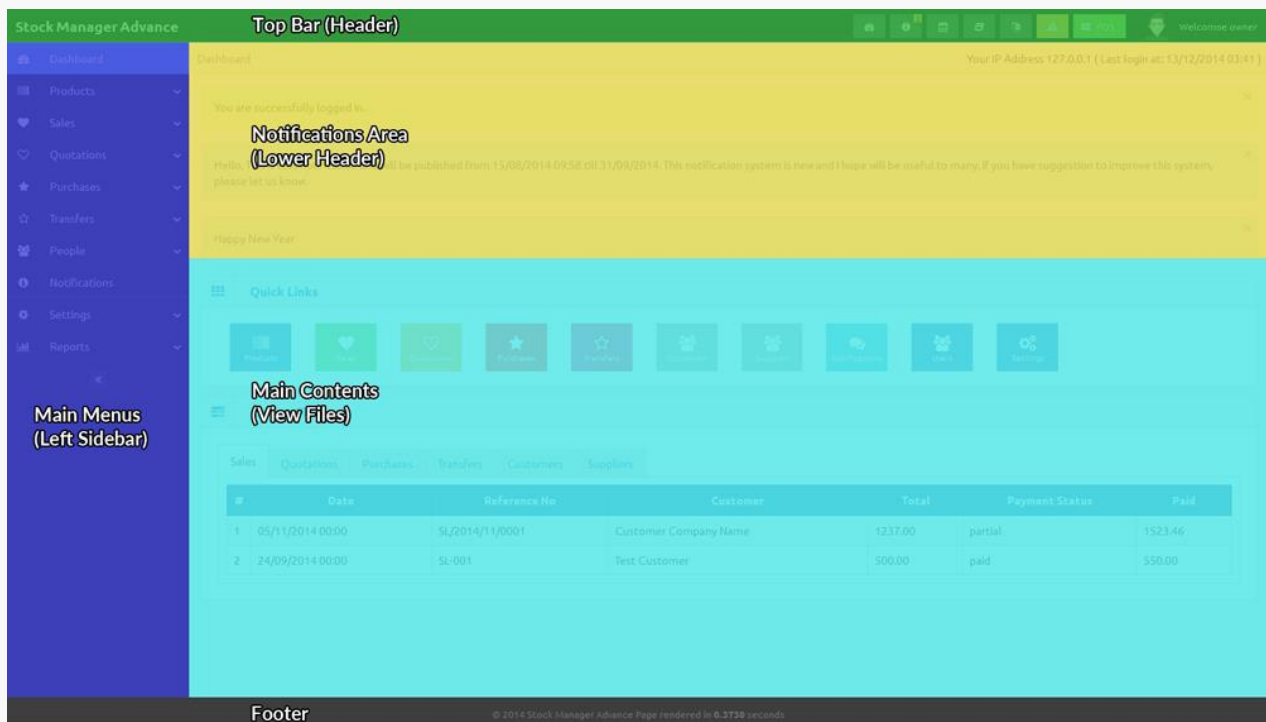
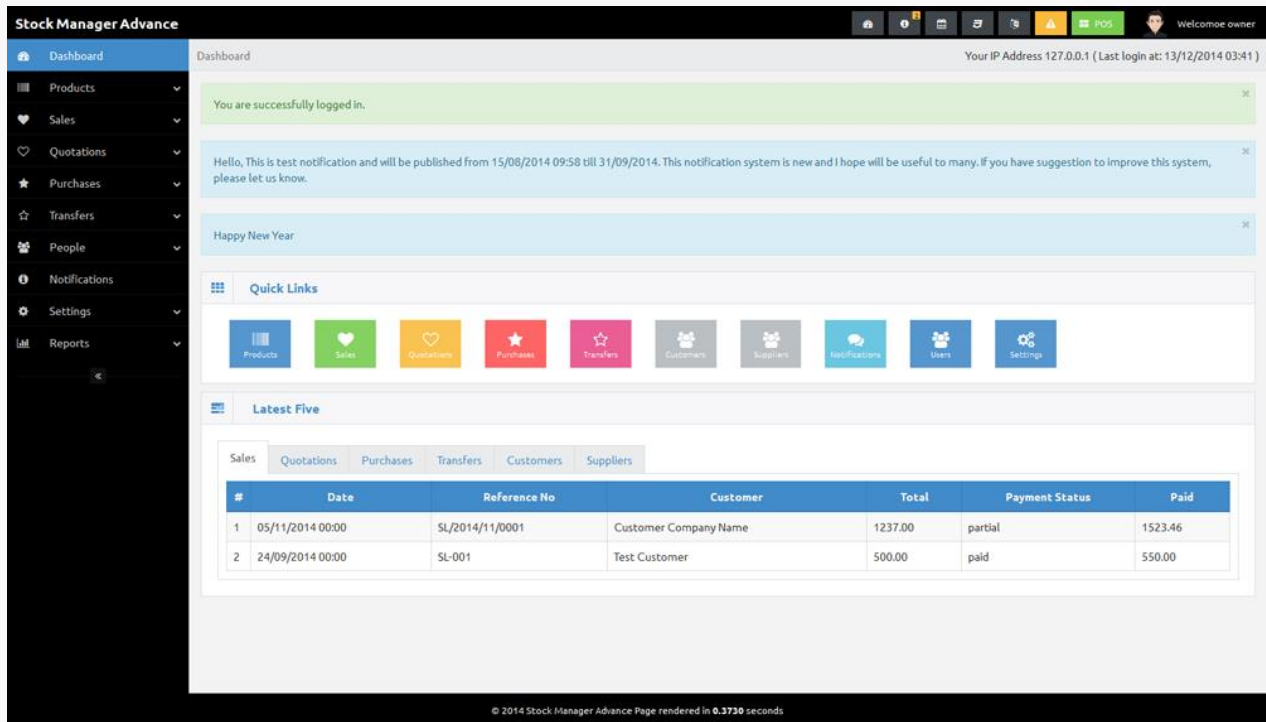
- **How can I change the view bill promo content?**

Please modify the `themes/default/views/promotions.php` as you like.

---

# User Guide

As RC3 comes with new theme, let me explain the main sections of the home screen. We are adding image of the dashboard and on right with overlay to name the main sections of the page. This sections are same through for each and every page. Only the main content area will be different for pages and will be displaying the view files from your theme folder.



New listing pages comes with new page menu position, select row column and Image column (where applicable). We have added the listing page and overlay page to explain the new sections. You can see the new menu position in top left of main content area. Building icon is to list the warehouse and the tasks icon for other page menus, will work with select row.

Stock Manager Advance

Dashboard

Products

List Products

Add Product

Print Barcodes

Print Labels

Import Products

Update Price

Damage Product

Sales

Quotations

Purchases

Transfers

People

Notifications

Settings

Reports

Home / Products

Your IP Address 127.0.0.1 (Last login at: 13/12/2014 03:41)

Products

Please use the table below to navigate or filter the results. You can download the table as excel and pdf.

Show 10 entries

Search:

Image	Product Code	Product Name	Category	Product Cost	Product Price	Quantity	Product Unit	Alert Quantity	Actions
	0123456	UPC-E Test Product	Category 1	69.00	99.00	0.00	M	5.00	Actions
	460490600KUS0067	Rapoo Keyboard & Mouse Combo 9060	Category 1	80.00	100.00	0.00	M	5.00	Actions
	639382000393	UPC-A Test Product	Category 1	69.00	99.00	0.00	M	5.00	Actions
	6935834010656	EAN13 Test Product	Category 2	69.00	99.00	3.50	M	5.00	Actions
	76543166	EAN8 Test Product	Category 3	69.00	99.00	14.50	M	5.00	Actions
	8935001720799	Mentos Chewing Gum	Category 1	3.59	4.49	0.00	unit	5.00	Actions
	95509815	Eno Lemon Fruit Salt	Category 1	0.49	0.79	0.00	Packet	5.00	Actions
	9555192502517	Wrigley's Doublemint Chewing Gum	Category 1	4.89	5.49	0.00	unit	5.00	Actions
	C001	Combo Product 1	Category 1	0.00	599.00	0.00	Set	0.00	Actions
	N002	Normal Product 2	Category 1	99.00	129.00	13.00	m	5.00	Actions
Image	[Product Code]	[Product Name]	[Category]	[Product Cost]	[Product Price]	[Quantity]	[Product Unit]	[Alert Quantity]	Actions

Showing 1 to 10 of 11 entries

Previous 1 2 Next

© 2014 Stock Manager Advance Page rendered in 0.2080 seconds

Stock Manager Advance

Dashboard

Products

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Import Products

Update Price

Damage Product

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Home / Products

Your IP Address 127.0.0.1 (Last login at: 13/12/2014 03:41)

Products

Page Menus (Building for warehouse and tasks for other page menu)

Please use the table below to navigate or filter the results. You can download the table as excel and pdf.

Show 10 entries

Number of rows to display

Search the table

Search:

Image	Product Code	Product Name	Category	Product Cost	Product Price	Quantity	Product Unit	Alert Quantity	Actions
	0123456	UPC-E Test Product	Category 1	69.00	99.00	0.00	M	5.00	Actions
	460490600KUS0067	Rapoo Keyboard & Mouse Combo 9060	Category 1	80.00	100.00	0.00	M	5.00	Actions
	639382000393	UPC-A Test Product	Category 1	69.00	99.00	0.00	M	5.00	Actions
	6935834010656	EAN13 Test Product	Category 2	69.00	99.00	3.50	M	5.00	Actions
	76543166	EAN8 Test Product	Category 3	69.00	99.00	14.50	M	5.00	Actions
	8935001720799	Mentos Chewing Gum	Category 1	3.59	4.49	0.00	unit	5.00	Actions
	95509815	Eno Lemon Fruit Salt	Category 1	0.49	0.79	0.00	Packet	5.00	Actions
	9555192502517	Wrigley's Doublemint Chewing Gum	Category 1	4.89	5.49	0.00	unit	5.00	Actions
	C001	Combo Product 1	Category 1	0.00	599.00	0.00	Set	0.00	Actions
	N002	Normal Product 2	Category 1	99.00	129.00	13.00	m	5.00	Actions
Image	[Product Code]	[Product Name]	[Category]	[Product Cost]	[Product Price]	[Quantity]	[Product Unit]	[Alert Quantity]	Actions

Showing 1 to 10 of 11 entries

Previous 1 2 Next

Images column

(Hover to view 200x200 and click menium to view bigger image)

Select rows to perform any page actions

Search the column

© 2014 Stock Manager Advance Page rendered in 0.2080 seconds

In RC<sub>3</sub>, main menus (left side) has been updated to track the active page and breadcrumb has been added on top of the main content area.

# Users

Users are the staff members (your employees). You can add any number of users and assign them group (manager groups and permissions in settings), biller and warehouse.

Owner and Admin user groups are with fixed permissions and any other user group added by you, can have custom permissions.

Please check the edit user page for some user related permission such as view/edit rights and discounts.

If you don't assign any biller and/or warehouse, the user will be able to add sales for all of them as admins.

The users added in customer/supplier modules will be saved in this table too but you need to edit/manage them from their modules.

Timeout feature has been enabled. The user will be timed out after 3 unsuccessful login attempts for 10 minutes. You can disable this in `app/config/ion_auth.php` by changing the `$config['track_login_attempts'] = TRUE;` to `$config['track_login_attempts'] = FALSE;` or you can increase the attempts from 3 to any number you like.

---

# Billers

Billers are the selling companies (you or your companies/organizations), you can sell/quote/invoice your customers with any biller, means you can have multiple companies/organizations and can assign any of these to your staff so that all of their sale will be under assigned billing company.

Only users with owner group rights can add billers. Logo, Company, Name (Contact Person), Email, Phone, Address and City input fields are required.

This module is simple to use and manage the biller. The interface is quite easy to understand. The logos can be uploaded by visiting the change logo under settings and once uploaded you need to edit the biller to set the new logo.

---

# Customers

Customers are the clients of your companies/organizations. They purchase the items that you/your companies/organizations sell. This module has been updated and now you can add customer groups in settings i.e, Normal Customer, Regular Customer, Resellers, Distributors etc and assign percentage decrement/increment to the price depending on their group.

Company, Name (Contact Person), Email, Phone, Address and City input fields are required. You can add extra information about the customer as there are 6 custom fields and the select box in front of each custom field is to display this information on invoices/quotations.

If the customer is not company, you can skip the company file with dash symbol (-) so that system will consider it as person.

The inputs for customer in other modules are no more select/drop down but ajax calls, you can type in search filed to get the suggestions and select any suggestion available in database for customers. You can

add customer by clicking the Add Customer menu under People from any page. The interface is quite easy to understand.

**Customer Groups:** The percentage in the customer groups are the addition/subtraction in the product price for that group. If you have set 10 percentage for customer group, then each customer of the group will have (10%) higher price automatically calculated on sales. If you set it to -10 percent, then the products price will be (10%) lower than normal price.

**Price Groups:** The price group can be assigned to customer and then all the sales will use that price group for the customer. This feature will help you set the different prices for customers.

Please be informed that the customer group percentage will be applied to the prices from price group too. Means that whatever customer price is the customer group percentage will be applied at the end.

---

## Suppliers

Suppliers are the vendors/suppling companies, the companies you buy your stock/items from.

Company, Name (Contact Person), Email, Phone, Address and City input fields are required. You can add extra information about the customer as there are 6 custom fields and the select box in front of each custom field is to display this information on purchases.

If the supplier is not company, you can skip the company file with dash symbol (-) so that system will consider it as person.

The inputs for supplier in other modules (purchases and products) are no more select/drop down but ajax calls, you can type in search filed to get the suggestions and select any suggestion available in database for supplier. You can add supplier by clicking the Add Supplier menu under People from any page. The interface is almost same as billers and customers, easy to use.

---

## Products

Products are the items that you sell to your customer. This module has been updated and has many new options/features. There are new menus for each product on List Products page. The icon menus have been replaced with the drop down menus.

1. **Product Details:**  
A new page has been added to display the products details.
2. **Duplicate Product:**  
To duplicate the product, all the field on add product will be updated with selected product details. You will need to change the code and name.
3. **Edit Product:**  
To edit product details.
4. **Set Rack:**  
To set/change product rack (only available if warehouse selected).
5. **View Image:**  
View the main product images, this is already shown in the image column.

6. **Print Barcode/Label:**

To print the product barcodes/label, this will bring you to the print barcode/label page with the item.

7. **Delete Product:**

To delete the product.

There are 4 types to choose for the product,

1. **Standard:** These are the standard product like phone, ram, speakers etc.
2. **Combo:** These are products that consist of more than 1 product in your stock like computer with Casing, RAM and Speakers as combo items.
3. **Digital:** These are the digital products that can be downloaded only like software, movies, pdf tutorials etc.
4. **Service:** This are service as checking/repairing fee for the computer.

Now you can assign the barcode symbology, product tax, tax method and supplier (up to 5 with their price) to each product. You can select the main product images and multiple product gallery images. You even can add the current stock for each warehouse.

The product details will be displayed on view product page and the product details for invoice will be displayed on the invoice under this items.

**Product variants:** This module have new option for product variants. You can add any number product variants/attributes and these will be tracked automatically on purchase/sale. There print barcode/label page for each product will show the new barcode image if there are variants available for the product. This will help you to manage the products well specially for those who need to track the products attribute i.e, sizes and color etc.

If your product has nested variants, then you can add the as Red Size 5, Yellow size 6 etc. You need to add these only once for each product.

**Print Barcodes and Labels:** This page has been added so that you can select any products to print barcode/label as desired. You can choose any page styles and print with any desktop printer.

**Quantity Adjustments:** This feature will help you to manage the damage and other issues with your stock.

**Stock Counts:** The stock count is the physical verification of the quantities and condition of items held in an inventory or warehouse. Stock count may be performed as an intensive annual end of year procedure or may be done continuously by means of a cycle count. An annual end of year stock count is typically done for use in a company's financial statements.

Once count has been completed, you can add adjustment to update your current stock.

**Product Units:** You can add product measuring units in system settings and then select the base unit while adding/editing the products. This feature will help you to manage the quantity well while purchase and selling in different units. Let's say, you purchase coke as a box of 12 bottles and you sell them as bottle, you can add base unit of box/bottle and then add other with conversion. You even can select the default purchase and sale units on add/edit product page.

**Import product and update price with csv file:** The instructions are available on the pages.

The option to add (product and variants) quantity to the warehouse is available on add product page but we recommend you to not use this. Instead you can add all products and their variants with 0 quantity then add purchase to update the stock for (products and their variants) to the warehouse.

---

## Sales

Sales (Invoices) to manage the sales and payments received. Add sale will automatically decrease the product quantity from the selected warehouse. If your product has variants that will be synchronized too. List sales page have these drop down menus in the actions column for each sale.

1. **Sale Details:**  
To view the sale details.
2. **View Payments:**  
To view the payments for the sale.
3. **Add Payment:**  
To record the payment for the sale. If you have enabled the paypal and skrill button in settings, the payment will automatically have recorded upon successful payment by customer.
4. **Add Delivery:**  
To add the delivery of the sale items.
5. **Edit Sale:**  
To edit the sale.
6. **Download as PDF:**  
To download the sale as pdf.
7. **Email Sale:**  
To email the sale to the customer.
8. **Return Sale:**  
To record return sale.
9. **Delete Sale:**  
To delete the sale.

**Add Sale** page has been redesigned to and are similar to add purchase. There is only single input field to add the products to order list. You can type the product name or code to get the suggestion and the select the suggestion or just scan the barcode with your barcode scanner to add product to the order list. If there is only 1 suggestion for your typed characters, then it will automatically have added to the order list. If you have scanned the barcode with option, the order item option will automatically set to the scanned barcode option.

Add product to order list and the totals will be automatically stick top and bottom once the order list reached the number that you have in settings for Product counts to fix for barcode input.

**Payment terms** are the number of days before this sale marked as due. This value should be an integer 14 for 14 days' payment term and 30 for 1 month etc.

There are 2 sale status

1. **Pending:** The sale is added but the items has not been handed-over/delivered to the customer.
2. **Completed:** The sale us added and the products has been sent/handed-over/proceed for delivery.

You can have partial payments for sales. There are 4 payment status

1. **Pending:** The payment has not yet received.
2. **Due:** The payment term had been reached but the payment has not yet received.
3. **Partial:** Customer has made the partial payment and there is balance that still need to pay by customer.
4. **Paid:** The payment for the sale has been completely paid.

There are 2 icon links at the end of add product to order list input.

1. Plus icon: To add the product to the order list manually, this won't be added to the database but only to the sale.
2. Card icon: To add the gift card to database and sell by adding to the order list.

**To edit or delete any payment,** please click the view payments link in actions on sales list or in page menu on sale view page.

**If any of the product in order list is red that means the product or selected variant is out of stock or warehouse quantity is lesser then ordered quantity (you can change the product variant or reduce the quantity).** If over-selling is disabled, it will produce error on submit.

### **Why sale price is higher than the price on list product page?**

Please check the customer groups for that customer. The customer groups allow you to set the percentage (%) addition/deduction to the product price for that group of customers.

---

## **Quotations**

Quotations modules is almost same as in v2.3. The only change is add quotation page redesign that is similar to the add sale page with the following status

1. **Pending:** The quotation has been generated but not yet sent to customer.
2. **Sent:** The quotation had been generated and sent to the customer. Emailing the quotation will automatically change the status to sent.
3. **Completed:** The sale had been generated for this quotation. Add invoice link on the quotation menu will automatically change the status to complete once the sale generated.

---

## **Purchases**

Purchases (Inventories) to update the stock of your products. Adding purchase will automatically increase the product quantity in the selected warehouse. List purchases page have these drop down menus in the actions column.

1. **Purchase Details:**  
To view the details of the purchase.
2. **View Payments:**  
To view the payments made to the purchase.
3. **Add Payment:**  
To add new payment record for the purchase.



4. **Edit Purchase:**  
To edit the purchase.
5. **Download as PDF:**  
To download the purchase as pdf.
6. **Email Purchase:**  
To email this to supplier.
7. **Delete Purchase:**  
To delete the purchase.

**Add Purchase** page has been redesigned. There is only single input field to add the products to order list. You can type the product name or code to get the suggestion and the select the suggestion or just scan the barcode with your barcode scanner to add product to the order list. If there is only 1 suggestion for your typed characters, then it will automatically have added to the order list.

Add product to order list and the totals will be automatically stick top and bottom once the order list reached the number that you have in settings for Product counts to fix for barcode input.

Please select more options to add the order tax, discount and shipping. You even can add purchase by csv files by visiting the Add Purchase by CSV in main menus under Purchases.

You even can add standard product to your database by clicking the + icon at the end of add product to order list input.

---

## Transfers

If you have multiple warehouses/stores, you might need to transfer/move item from one to another. This module will help to manage these tasks. You can add transfer to record the transfer details.

There are 3 transfer status

1. **Pending:** The transfer is added but the products are not yet sent so no inventory action will be performed.
2. **Sent:** The transfer is added and products has been sent but not yet reached the destination so the items have been checked from the sending warehouse but not yet add/updated to the destination warehouse.
3. **Completed:** The transfer is added and products has been sent by from warehouse and received in to warehouse so the item will be subtracted from sending rehouse and added/updated in the destination warehouse.

---

## Settings

Please setup cron job as mention on the page. The cron job can be run from the local installation by the settings page but send the email depends on your local setup.

Please add your default currency and save your settings first. You need to set default currency and accounting method before using this system.

The default currency is very important to set before any sale as this this would destroy the costing if you set if after sales.

Let me explain the system settings page. In main content area, there are Skill and Paypal settings links in the end of the box heading System Settings (page menu).

## 1. Site Configuration

- **Site Name:** Input for the site name (whatever you want to call this system).
- **Language:** Option to select system default language.
- **Default Currency:** Option to select system default currency (THIS SHOULD BE SAVED BEFORE ADDING ANY DATA).
- **Accounting Method:** There are 3 methods available
  - **FIFO (First In First Out):** FIFO inventory costing method will not work with over selling.
  - **LIFO (Last In First Out):** LIFO inventory costing method will not work with over selling too.
  - **AVCO (Average Cost Method):** AVCO is the only method that you can use with over selling enabled.
- **Default Email:** Input for system default email, all email will be sent from this email address.
- **Default Customer Group:** Option to select default customer group (useful for adding customer).
- **Default Price Group:** Option to select default price group (useful for adding customer).
- **Maintenance Mode:** Option to enable or disable offline mode.
- **Theme:** Option to select theme.
- **RTL Support:** Option to enable right to left languages.
- **Login Captcha:** Option to enable login captcha.
- **Number of days to disable editing:** You can set the number of days to disable the edit sales
- **Rows per page:** Option to show the no of record in table on each listing page.
- **Date Format:** Option to select date format.
- **Timezone:** Option to choose your timezone. This is AC input just type your continent/city and choose it from suggestion.
- **Calendar:** Option to choose calendar privacy, Shared or Private.
- **Default Warehouse:** Option to select the default warehouse, this will be auto selected for owner on add sale/purchase/quotation/transfer page.
- **Default Biller:** Option to select the default biller, this will be auto selected on add sale/quotation page.

○

## 2. Products

- **Product Tax:** Option to enable/disable product level tax.
- **Racks:** Option to enable/disable product rack feature.
- **Product Variants:** Option to enable/disable product variants (attributes) feature.
- **Product Expiry:** Option to enable/disable product expiry date feature.
- **Remove expired products from stock:** Should system automatically remove the expired products from stock with cron job?
- **Image Size:** Option to set image sizes that can be uploaded
- **Thumbnail Size:** Option to set thumbnail size (50-80).
- **Watermark:** Option to enable/disable watermark on product images, water mark text will be your site name.
- **Display warehouse products:** Should system display products with 0 quantity in warehouse?

- **Barcode separator:** Please select any option for separating the products code with variant id (useful for auto select the variant on sale with barcodes).
- **Barcode Renderer:** Render barcode as images or as svg.
- **Update cost with purchase:** Should system update product cost with new cost while adding purchase.

### 3. Sales

- **Over Selling:** Option to enable over selling, this option only can work with AVCO accounting method, enabling this will automatically change the account method to AVCO (if it was FIFO or LIFO).
- **Reference Format:** Option to select the reference format.
- **Order Tax:** Option to enable/disable order level tax.
- **Product Level Discount:** Option to enable/disable product level discount.
- **Product Serial:** Option to enable product serial input on sale.
- **Auto Detect Barcode:** Option to enable/disable auto detection for barcode.
- **Product count to fix barcode input:** No of the row on add sale/quotation/purchase/transfer page to fix the product input and totals to top and bottom.
- **Cart Item Addition Method:** Option to select the method to add items to order list, You must select Add New Item to Cart if your products have variants.
- **Default Order Page Focus:** After adding the product to order list, should the focus set on the add item input or the quantity input fir newly added product?
- **Invoice View:** You can switch the invoice layout to Standard or Tax Invoice.

### 4. Prefix

- **Sales Reference Prefix:** Option to set sale reference prefix.
- **Return Reference Prefix:** Option to set return sale reference prefix.
- **Payment Reference Prefix:** Option to set sales payment reference prefix.
- **Purchase Payment Reference Prefix:** Option to set purchase payment reference prefix.
- **Delivery Reference Prefix:** Option to set delivery reference prefix.
- **Quotation Reference Prefix:** Option to quotation sale reference prefix.
- **Purchase Reference Prefix:** Option to set purchase reference prefix.
- **Return Purchase Reference Prefix:** Option to set return purchase reference prefix.
- **Transfer Reference Prefix:** Option to set transfer reference prefix.
- **Expense Reference Prefix:** Option to set expense reference prefix.
- **Quantity Adjustment Reference Prefix:** Option to set quantity adjustment reference prefix.

### 5. Money and Number Format

- **Decimals:** Option to set number of decimals for amounts.
- **Quantity Decimals:** Option to set number of decimals for quantity.
- **South Asian Countries Currency Format:** If you are from India, Nepal or Pakistan etc?
- **Decimals Separator:** Option to set decimals separator.
- **Thousand Separator:** Option to set the thousands separator.
- **Display Currency Symbol:** If you want to display currency symbol before amounts
- **Currency Symbol:** Set your currency symbol as \$ or `<i class="fa fa-dollar"></i>`

### 6. Email

- **Email Protocol:** Option to select email sending protocol.
  - **PHP Mail Function:** Send email using default php mail function.
  - **Send Mail:** Send email using sendmail and the default mailpath is /usr/sbin/sendmail
  - **SMTP:** Requires extra information and the default time out is 5 seconds.

- **SMTP Host:** SMTP Server Address
- **SMTP User:** SMTP Username
- **SMTP Password:** SMTP Password
- **SMTP Port:** SMTP Port

7. Award Points

- **Customer Award Points:** Each X spent is equal to X award points
- **Staff Award Points:** Each X in sales is equal to X award points

You can manage currencies, categories, sub-categories, taxes, warehouses, customer groups, email templates, user groups and permissions. In the admin area all the prices are in default currency and this multiple currency feature is just for front end that will be added later.

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## Reports

The following reports are available

1. **Overview Chart:** Main reports page with links to all other reports and the overview chart.
2. **Warehouse Stock Chart:** Warehouse stock report, you can choose the warehouse in page menus.
3. **Best Sellers:** Overview of bestselling products.
4. **Product Quantity Alerts:** The list of products that are reached the alert quantity and need to be purchased.
5. **Register Report:** All record of register/counters for POS module.
6. **Product Quantity Alerts:** The items that have reached the low stock (alert quantity).
7. **Product Expiry Alerts:** The list of products that are about to expire in less than 90 days.
8. **Product Reports:** For customized product report, you can click the icon at page menu for customize the report.
9. **Adjustment Report:** Quantity adjustments report can be customized as others.
10. **Categories Report:** Overview of the categories' sales.
11. **Brands Report:** Overview of the brands' sales.
12. **Daily Sales:** Calendar with daily sales.
13. **Monthly Sales:** Calendar with monthly sales.
14. **Sales Report:** For customized sales report, you can click the icon at the page menu for customize the report.
15. **Payment Report:** For payment report, you can click the icon at the page menu for customize the report.
16. **Profit and/or Loss:** Profit and/or Loss report for the selected time frame (date range).
17. **Daily Purchases:** Calendar with daily purchases.
18. **Monthly Purchases:** Calendar with monthly purchases.
19. **Purchase Report:** For customized purchase report, you can click the icon at the page menu for customize the report.
20. **Expenses Report:** Expense list and can be customized as other reports.
21. **Customer Report:** For customer report, you can click the icon at the page menu for customize the report.
22. **Supplier Report:** For supplier report, you can click the icon at the page menu for customize the report.
23. **Staff Report:** For staff report, you can click the icon at the page menu for customize the report.

# DEVELOPER GUIDE

As you know SMA is developed with CodeIgniter PHP Framework and you can find the user guide for framework at [http://www.codeigniter.com/user\\_guide/](http://www.codeigniter.com/user_guide/) Most of the times this will be handy resource for you to check for guide/code/snippets on this user guide.

**Please always backup your files and database before editing them.**

We didn't add any comment in code. All the methods/functions are on same pattern described here.

I am illustrating the page function here with comment so that you can have idea how these pages are working. In controller class, each method/function present a page. In this example, the controller class is comments and the method/function is add page. The code will handle the add page and the view files will in your theme/comments/add.php

You can check the user group permission by calling the sma library's checkPermissions() You even can set your own custom permissions. The available variables are `$this->Owner`, `$this->Admin`, `$this->Customer` and `$this->Supplier` in all controllers and `$Owner`, `$Admin`, `$Customer` and `$Supplier` in all view files (if you passed them the `$this->data`)

You can set the flash messages as `$this->session->set_flashdata('item', 'value');` and item as

1. **'message'** for success message
2. **'error'** for any error
3. **'warning'** for any warning alert

so to display a success message, you will need to do this `$this->session->set_flashdata('message', lang('success_msg_lang_key'));`

Input variables are mostly not defined in controller's page function. So you need to check the view files for inputs. But in some pages, these are defined in controller too.

For validation rules, you might need to check the controller as we doing in this example. But there are some rules that are defined in `form_validation.php` in `app/config/` folder. You might need to check this `form_validation.php` for your page. As we don't passing any variable to `$this->form_validation->run()` so the array will be `comments/add`. Below in removing the required from field if (`$this->form_validation->run('companies/add') == true`) {, we need to check `companies/add` to set the validation rules for the page.

To load the view files, we have mentioned 2 ways, one by calling the core controller's `page_construct` function and other by calling default loader view function. These both are used, the `page_construct()` is called to load the full page view and the loader view is called to load the modal view.

```

class Comments extends MY_Controller {

    function add() {

        // check user permissions
        $this->sma->checkPermissions();

        // validate rules http://www.codeigniter.com/user\_guide/libraries/form\_validation.html#rulereference
        $this->form_validation->set_rules('comment', lang("comment"), 'required|min_length[3]|other_validation');

        // Check validation
        if ($this->form_validation->run() == true) {

            // Validation true, perform actions, saving data in array
            $data = array(
                'comment' => $this->input->post('comment'),
                'from_date' => $this->input->post('from_date') ? $this->sma->fld($this->input->post('from_date')) : NULL,
                'till_date' => $this->input->post('to_date') ? $this->sma->fld($this->input->post('to_date')) : NULL,
            );
        }

        // validate again and send data to model
        if ($this->form_validation->run() == true && $this->commnets_model->addComment($data)) {

            // validation was fine and model returned true so set message and redirect
            $this->session->set_flashdata('item', 'value');
            redirect("welcome");
        } else {

            // validation failed or model returned false

            // set input variables, most these are not set and used view files for input
            $this->data['comment'] = array('name' => 'comment',
                'id' => 'comment',
                'type' => 'textarea',
                'class' => 'form-control',
                'required' => 'required',
                'value' => $this->form_validation->set_value('comment'),
            );

            // check errors
            $this->data['error'] = validation_errors() ? validation_errors() : $this->session->flashdata('error');

            // set any other variable to pass to view
            $this->data['modal_js'] = $this->site->modal_js();

            // load view by calling core controller's page_construct()
            $bc = array(array('link' => base_url(), 'page' => lang('home')), array('link' => '#', 'page' =>
lang('comments')));
            $meta = array('page_title' => lang('add_comment'), 'bc' => $bc);
            $this->page_construct('comments/add', $meta, $this->data);

            // OR load view by calling loader's view()
            $this->load->view($this->theme . 'comments/add', $this->data);
        }
    }
}

```

# Adding Language

Guide to add new language.

- Please create new folder in app/language/ and name it yourlanguage
- Folder name should be without space and all lower letters.
- Copy all the files from app/language/english/ and paste then to app/language/yourlanguage/
- Now you can translate these all file to your language
- Download flag image (format: png, width: 16px, height: 11px) and paste it in assets/images/
- You can add new key to language array. (See Code Section)

Please replace the yourlanguage with your language. For example, spanish, french, chinese etc

**If you are getting the error "Unable to load the requested language file: language/francais/form\_validation\_lang.php or calendar\_lang.php" Then you will need to add your language in system/language/ as you did above for app/language/ and translate the system language files to your language.**

To add select option in setting's language

Please open themes/default/views/settings/index.php and search for ( \$lang = ) You can replace the default with your theme if you are using different theme. You can add new array key for your language as following:

```
$lang = array(  
    'english' => 'English',  
    'yourlanguage' => 'Your Language Name',  
);
```

yourlanguage must be same folder name that you created in app/language/

# Theme

We are aware that developers always need to modify the base code. Once the update available, their job become difficult to update as they have modified the code for their client needs. This is first step to offer easy modification for developers. Though this only covers the view side. But we will be exploring the ways to offer easy modification for controllers/models side in future.

In RC3 you can add your own themes by creating the folder in /themes/. Please make sure there is no space in the folder name. Currently there are 2 folders in /themes/ i. default ii. errors

Errors folder will be the same for all themes and you only need to modify the error file in /themes/errors/html/ (in case you need to modify, most of the times you won't need to modify these error files.)

You theme will have 2 folders, assets and views, assets folder will contain all you css, js and images files and the views folder will contain the view files for page (main content area view).

The main file to modify will be the header.php and footer.php in /themes/yourtheme/views/ as you will set all the styles and javascript code here.

If you need to have to modify only a few view files, then you can just create only views folder in your /themes/yourtheme/ and copy the view file from /themes/default/ and paste to /themes/yourtheme/ and modify this.

For example, If I need to modify the dashbord view file, I will create a theme folder in /themes/ and name it 'myviews', copy the dashboard.php file from /themes/default/ and will paste into /themes/myviews/ and modify this files as per my needs. I will need to add and set the theme in settings view file as

```
$themes = array(
    'default' => 'Default',
    'myviews' => 'My Modified View Files'
);
```

Once I updated the settings with 'My Modified View Files' as my new theme. The dashboard view file will be loaded from myviews theme and all other those don't exist in the myviews will be loaded from the /themes/default/

Please be informed this rule does not apply to assets folder for any theme. If you have created the assets folder in your theme, system will look all the css, js and images from this folder and if they do not exist, you will get page without any style.



# Removing Required

To remove validation, you will need to edit few files

1. app/controllers/sleectTheControllerYouWantEdeit
2. themes/default/selectTheAppropriateFolderOrFile
3. Database table to accept null value for that field

Please alter the database table to accept the null for your inputs (postal code).

1. Open phpmyadmin and select the database
2. Select the customers table
3. Click Structure
4. Click change on field name (city) line
5. Tick/check the null checkbox
6. Click Save

Now try to add customer without city. You won't get any error as we have remove the required validation for this input.

You can use these steps to remove the required field for any other fields.

**Please be careful while removing the required from some fields as these might be used in other modules, like removing the required validation for email to accept customer with no email could cause issues/errors for emailing the invoice to customer in sale/pos.**

Let say we want to remove the restriction from postal code from add customer

Open themes/default/views/customers/add.php and look for city input code

```
<?php echo form_input('city', '', 'class="form-control" id="city" required="required"); ?>
```

We need to remove the required (you might need to check pattern) attributes. We will delete the code below  
`required="required"`

You need to check the validation rules in app/config/form\_validation.php We are validation

```
if ($this->form_validation->run('companies/add') == true) {
```

so search 'companies/add' array and then look for array with field 'city' and remove the required from rules and now your rules will be as

```
'rules' => 'other_validation'
```

For some pages, you need to check the rules in controller as app/controllers/customers.php and look for function add() and see the validation line on top as

```
$this->form_validation->set_rules('city', lang("city"), 'required|other_validation');
```

Remove the line, if you want to keep other validation, please remove required from last part of the validation. After this our validation line will look as

```
$this->form_validation->set_rules('city', lang("city"), 'other_validation');
```

# Add/Remove column to table

Here are the steps to follow

1. Modify the select statement and select the desired column, in the controller.
2. Add new element to datatables aoColumns (should be in sequence).
3. If you need to add footer filter then to dtFilter.
4. Lastly add the th tag with column heading to table head and table foot (should be in sequence).

These will be the step for add any new column on any listing page.

## To remove a column, you will need to

1. Modify the select statement and remove the desired column, in the controller.
2. Remove the element from aoColumns of datatables.
3. If there is table foot filter, please remove it from dtFilter too.
4. Lastly Remove the th tag with column heading to table head and table foot.

I am adding the code to add the new column (state) on the customer list page and there won't be code to remove the columns but you can follow the step above.

1. Open then app/controllers/customers.php and look for the select statement in getCustomers() and add state after city

```
->select("id, company, name, email, phone, city, state, customer_group_name, vat_no, award_points")
```

2. Open the themes/default/views/customers/index.php and look for aoColumns and null as 7th element

```
"aoColumns": [ {"bSortable": false, "mRender": checkbox}, null, null, null, null, null, null, null, null, null, {"bSortable": false}]
```

3. Let's add column filter we will be adding for column number 6 the 7th element if start from 1 for array 0. Please don't forget to increase the column number for other columns that are after this.

```
{column_number : 6, filter_default_label: "[<?=lang('state');?>]", filter_type: "text" },  
{column_number : 7, filter_default_label: "[<?=lang('customer_group');?>]", filter_type: "text" },  
{column_number : 8, filter_default_label: "[<?=lang('vat_no');?>]", filter_type: "text" },  
{column_number : 9, filter_default_label: "[<?=lang('award_points');?>]", filter_type: "text" },
```

Array element start from 0 so the 7th element number will be 6 in the array.

4. Let's add th tag to table head and foot by add the line below after the th tag city for city.

```
<th><?= Lang("state"); ?></th>
```

# Sorting Tables

We have used datatables library for all listing tables. If you need to change any table sorting column, you will need to modify the view file.

The first column of the table will start from index 0 and then increase 1 with each column. Let say you want to sort the table with 4th column then you will need to use index 3 as "aaSorting": [[3, "asc"]],

You can change the sorting for any table by modifying the files as described here.

For example, if you need to change the sorting for customers, you will need to edit the /theme/default/customers/index.php and search

```
"aaSorting": [[1, "asc"]],
```

This is being sorted for 2nd table column, if you want to sort it by id (1st table column) then you will need to change as

```
"aaSorting": [[0, "asc"]],
```

You even can sort the table with multiple columns as

```
"aaSorting": [[0, "asc"], [1, "asc"]],
```

# Barcodes and Labels

You can print barcodes/labels by visiting the print barcodes/labels under products menu, then add products and choose any template. The feature has been updated to suit most of your needs.

Beside fixed templates, the continuous feed option has been improved to accept the size (width, height and orientation) so that everyone can print according to their need. There is option to display extra information on the barcodes/labels.

You can easily add your own template by modifying the themes/default/assets/styles/helpers/print.css and the view file themes/default/views/products/print\_barcodes.php as you need.

**You can visit categories/subcategories to add all the products to this barcode/label printing list, same can be done from purchases and transfers.**

Functions/Methods handling the barcodes and labels pages are

- `print_barcodes()` - Handles barcode/label printing for multiple products
- `single_barcode()` - Handles barcode printing for single products
- `single_label()` - Handles label printing for single products
- `product_actions()` - Handles barcode and label printing for multiple selected products

File: `app/controllers/products.php`