POS+
EASY IN EASY OUT

SOFTWARE USER GUIDE

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Contents

Welcome to POS Plus Cloud

Dear Customer,

Thank you for taking interest in POS Plus Cloud Inventory Management and Point of Sale Software. We welcome you onboard and wish you best of luck for enhancing your service with our software.

In order to provide you the best experience, we have prepared a detailed documentation and tutorials to get started using the software.

We would also like to take the opportunity to let you know that we are available during working hours (9AM-9PM MON-SAT) for any type of support or assistance required.

You can contact us at:

get@posplus.cloud
+1(346)416-8016
posplus.cloud

Thank you

POS Plus Team

Login Information

Please login using the below login details

Login URL	https://demo.posplus.cloud	
Owner Role	Username: owner	Password: Owner2019
Admin Role	Username: admin	Password: Admin2019
Sales Rep Role	Username: sales	Password: Sales2019

NOTE: 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)

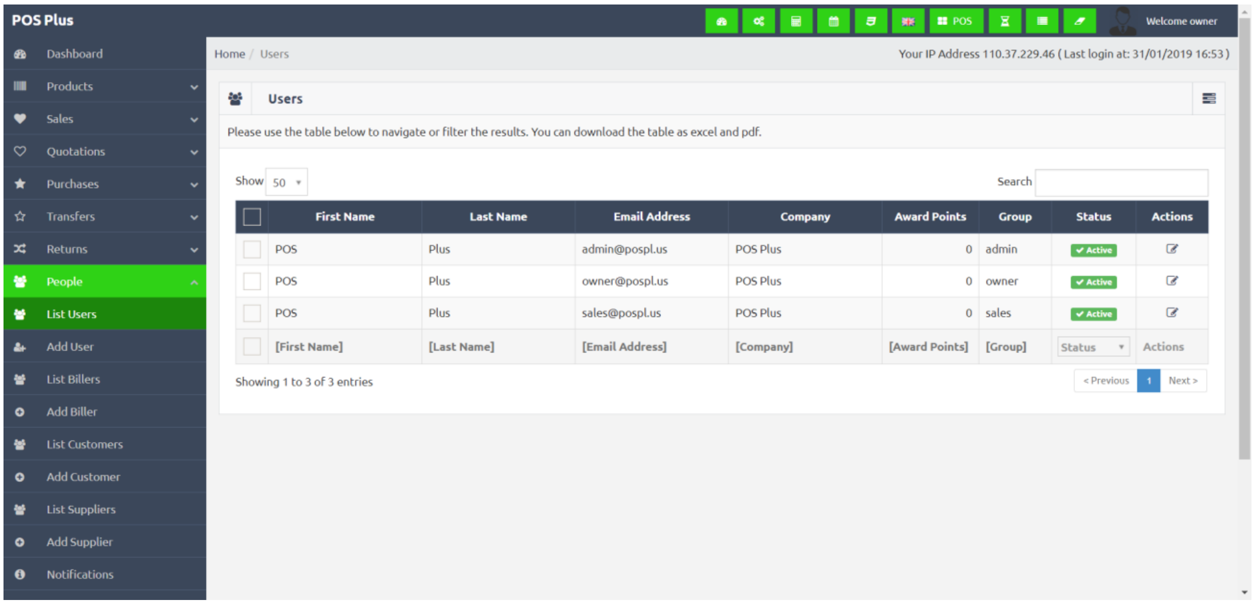
TIP: Please change your passwords and make sure it says safe and confidential for security purposes. We will not be responsible for data loss or data theft.

Initial Setup

After you login for the first time, you need to go into the following sections and edit your information so that it matches your company information:

Menu -> People -> Users

Also make sure you change your password for security reasons.



Workflow

In order to use the software, you need to understand the workflow of the application. Following is how it works:

Add Suppliers

↓

Add Products

↓

Make Purchase Order

↓

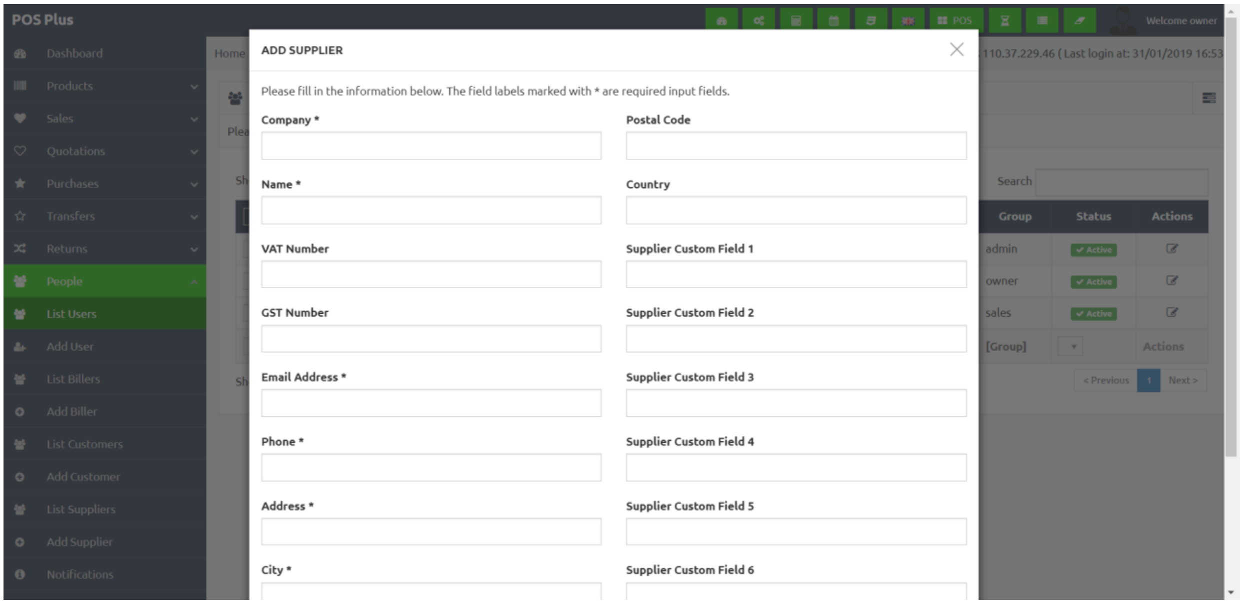
Add Customer

↓

Add Sale

Add Supplier

You can add supplier by clicking the Add Supplier menu under People from any page. The interface is easy to use.



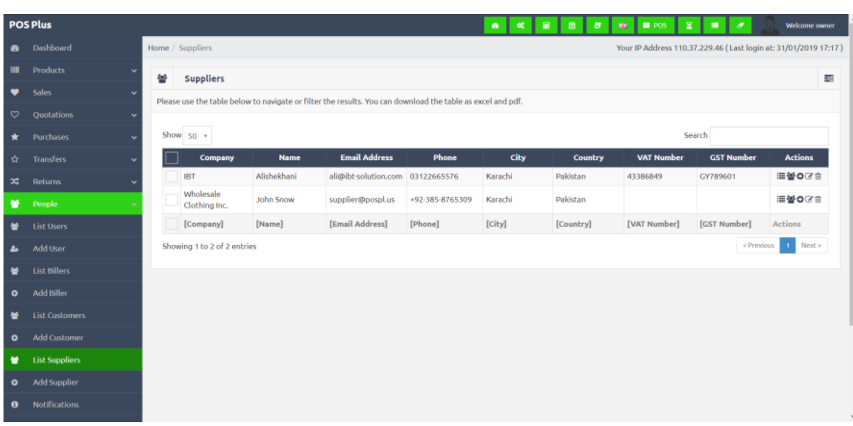
Suppliers are the vendors/supplying companies, the companies you buy your stock/items from.

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.

Once you have added a supplier and if need to edit or modify information you can go to to the following page to make edits:

Menu>People>List Suppliers>Select and Modify



POS
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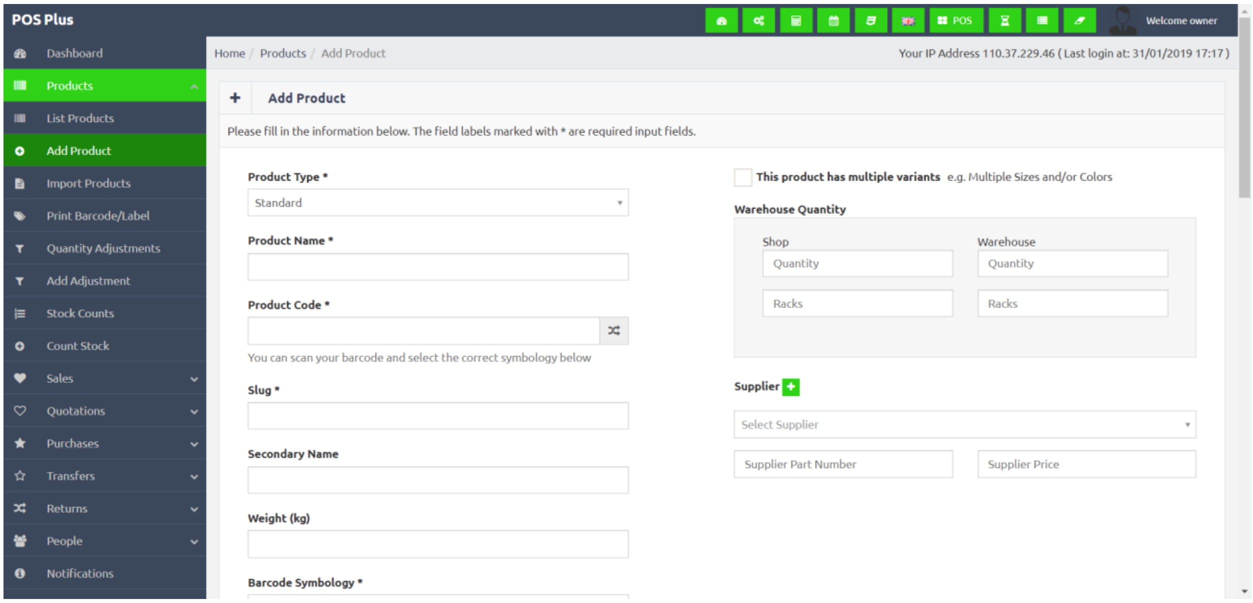
Add Product

Products are the items that you sell to your customer.



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 these items.

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.

Variants are single level and 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 purchasing and selling in different units.

For example, 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. Add the products and select new base unit. You even can select the default purchase and sale units on add/edit product page.

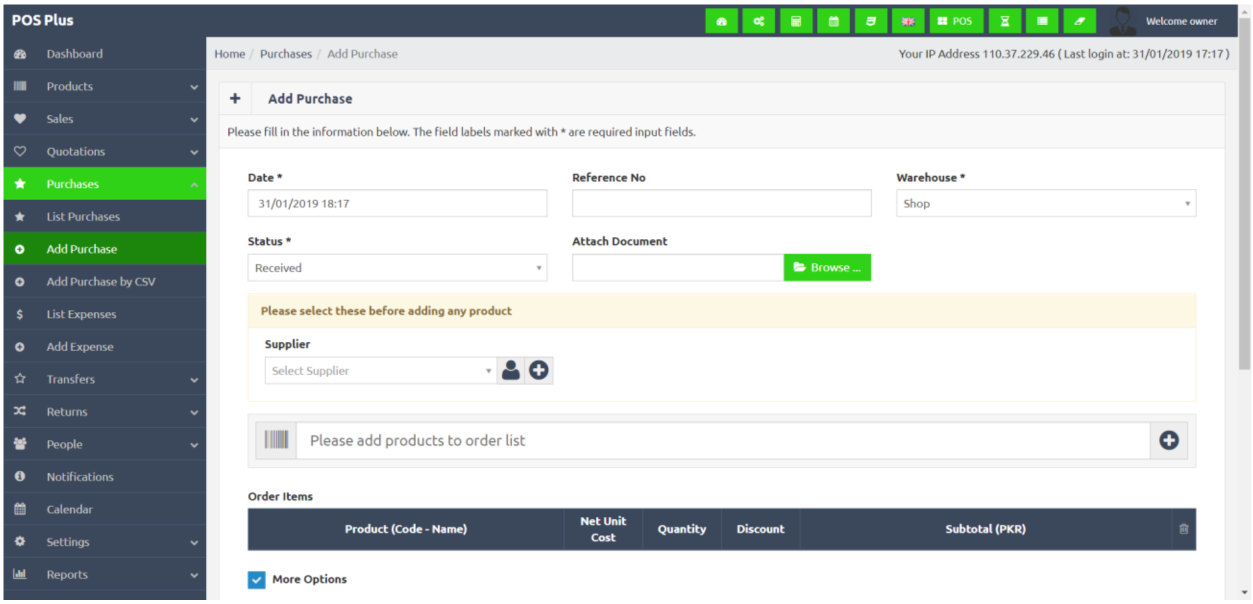
Import product and update price with csv file:

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.

Add Purchase

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:**
   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.

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.

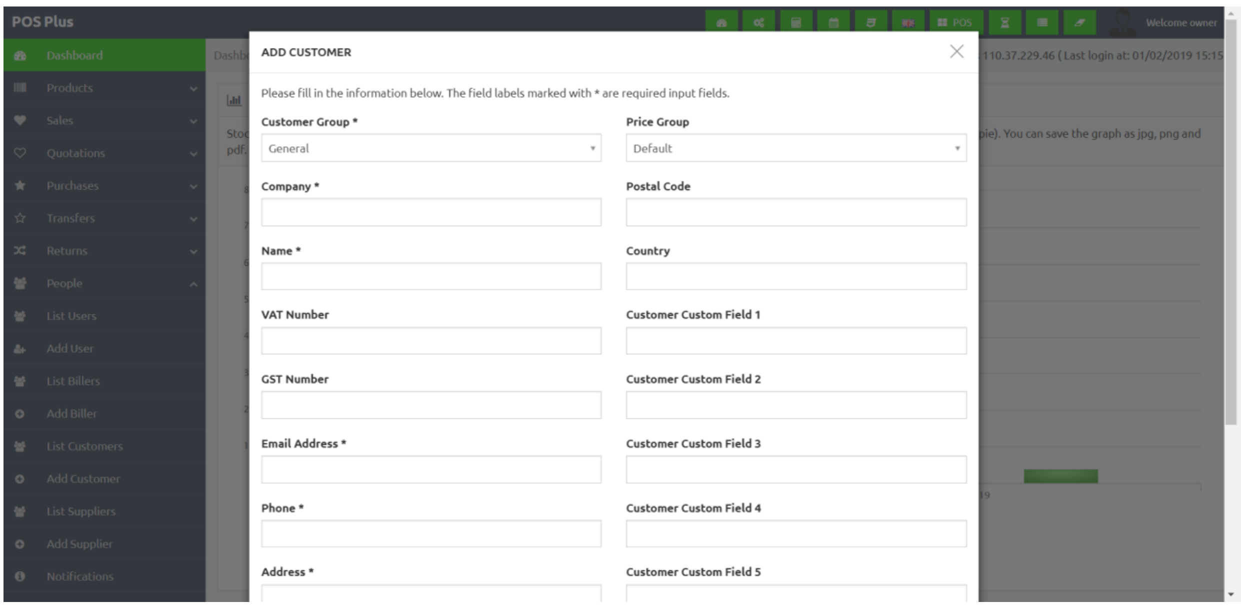
Add Customer

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.

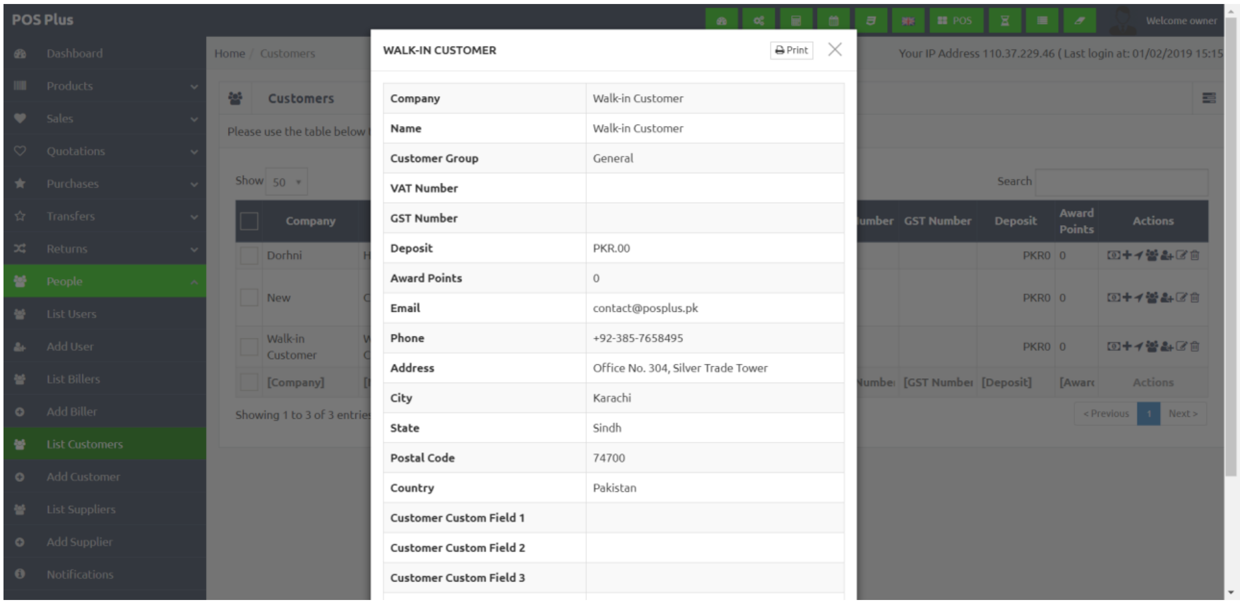


Customer Groups: The percentage in the customer groups are the addition/subtraction in the product price for that group. If you have set 10 percentage for customer group, then each customer of the group will have (10%) higher price automatically calculated on sales. If you set it to -10 percent, then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

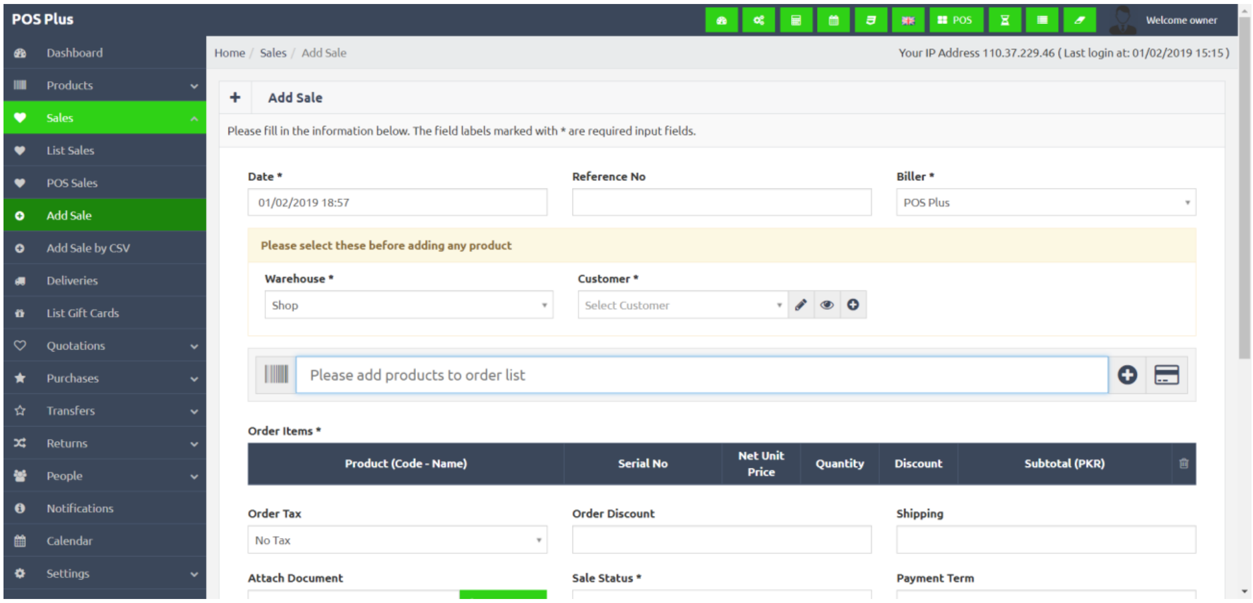
Please be informed that the customer group percentage will be applied to the prices from price group too. Means that whatever customer price is the customer group percentage will be applied at the end.

For POS Sales by default Walkin Cutomer is added which you can use for all your customers.



Add Sale

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
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.

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

Pending: The sale is added but the items has not been handed-over/delivered to thecustomer.

Completed: The sale us added and the products has been sent/handedover/proceed for delivery.

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

Pending: The payment has not yet received.

Due: The payment term had been reached but the payment has not yet received.

Partial: Customer has made the partial payment and there is balance that still need to pay by customer.

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.

Plus icon: To add the product to the order list manually, this won't be added to the database but only to the sale.

Card icon: To add the gift card to database and sell by adding to the order list.

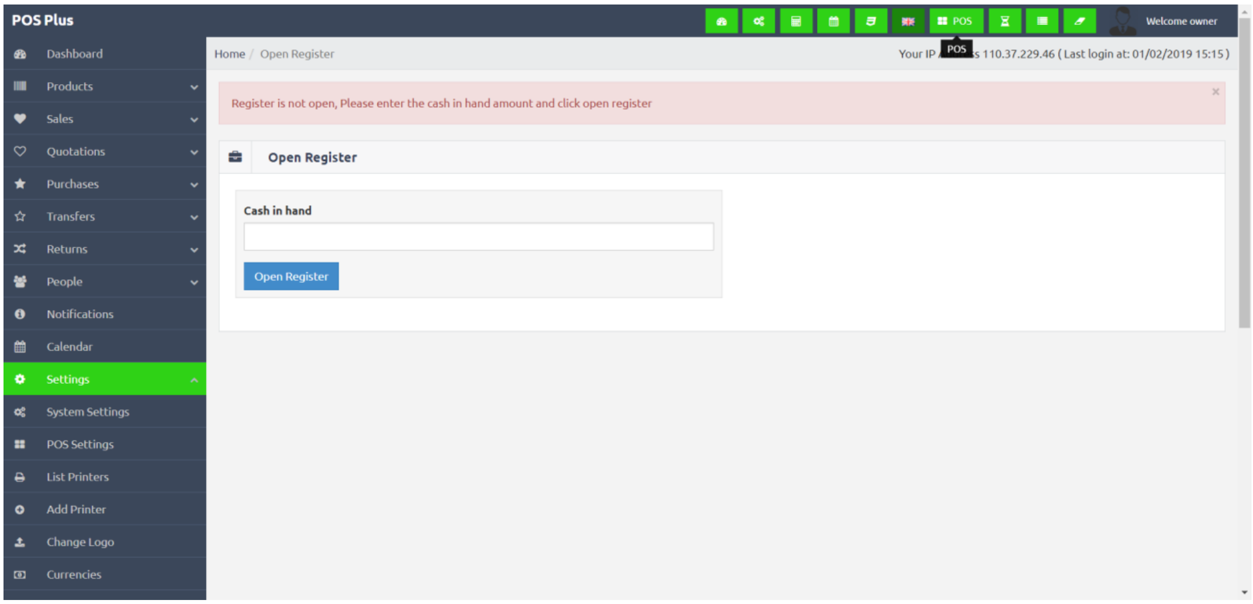
To edit or delete any payment, please click the view payments link in actions on sales list or in page menu on sale view page.

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.

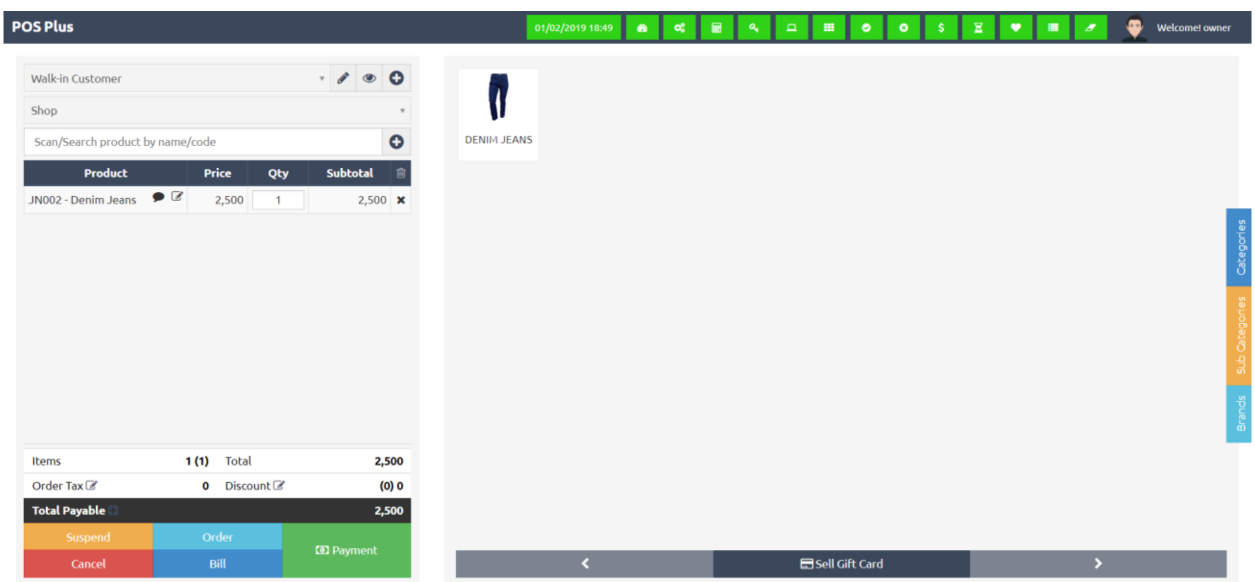
Point of Sale Interface

You can access the POS anytime by clicking on the POS button on the top bar.

Once you click on the POS button it will ask you to enter your current cash in the register.



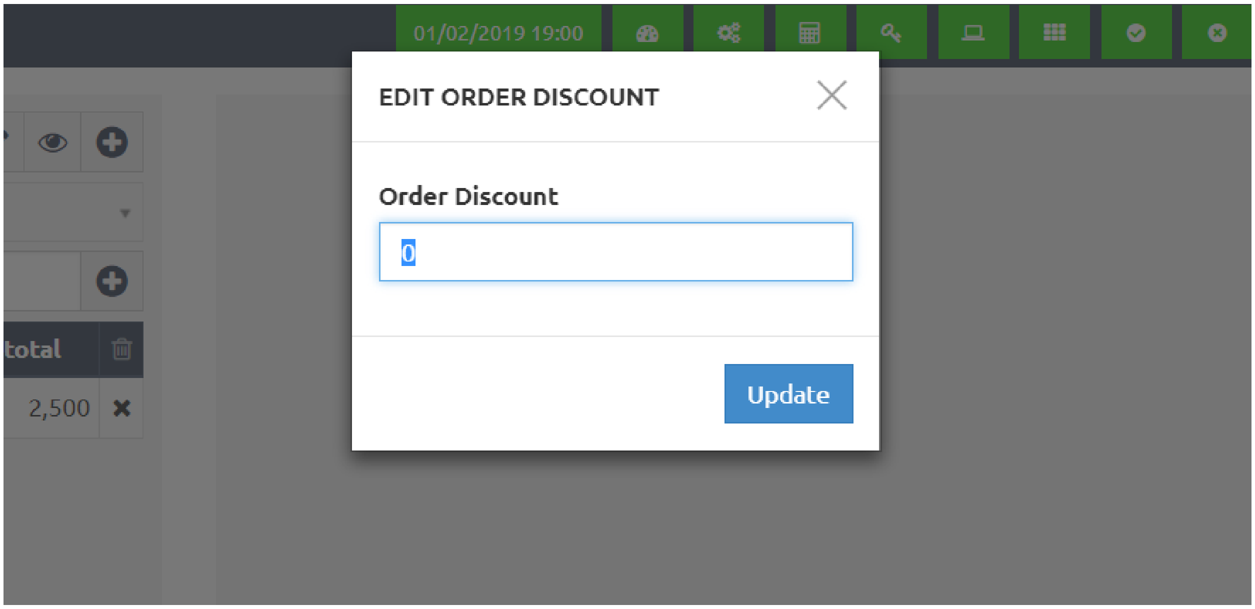
When you enter the cash it will open the POS screen.



All your products will be listed according to the category.

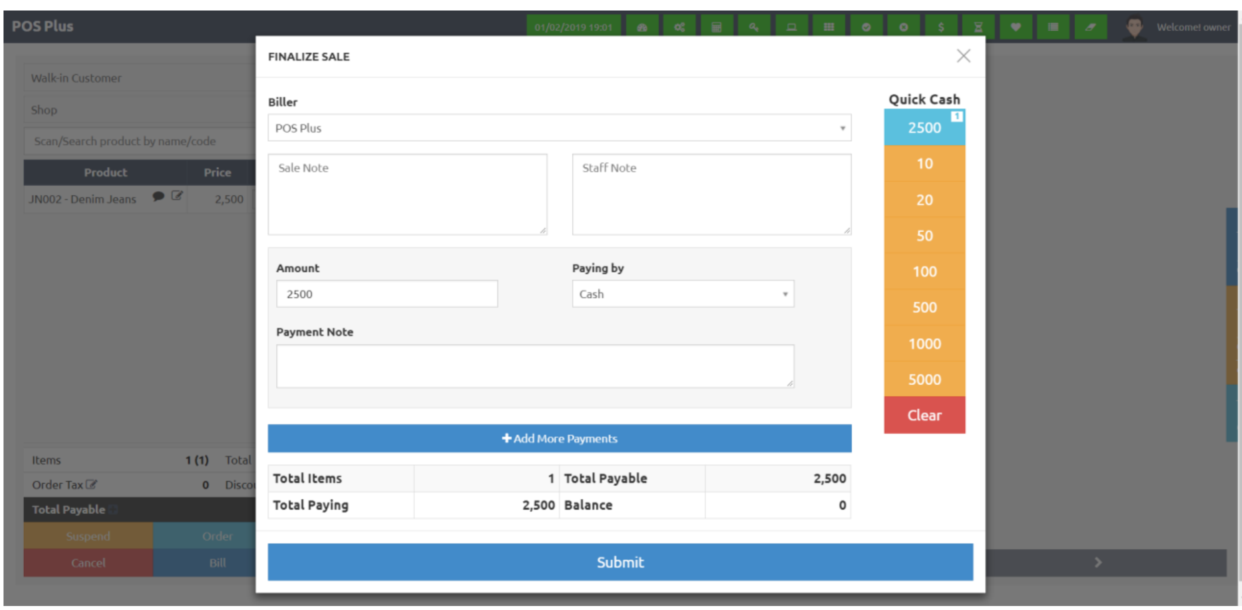
In order to generate a sale, simply click on the product and add it to the list.

If you want to add discount you can click on the bottom discount edit icon



Once you update the discount it will automatically subtract from the sale total.

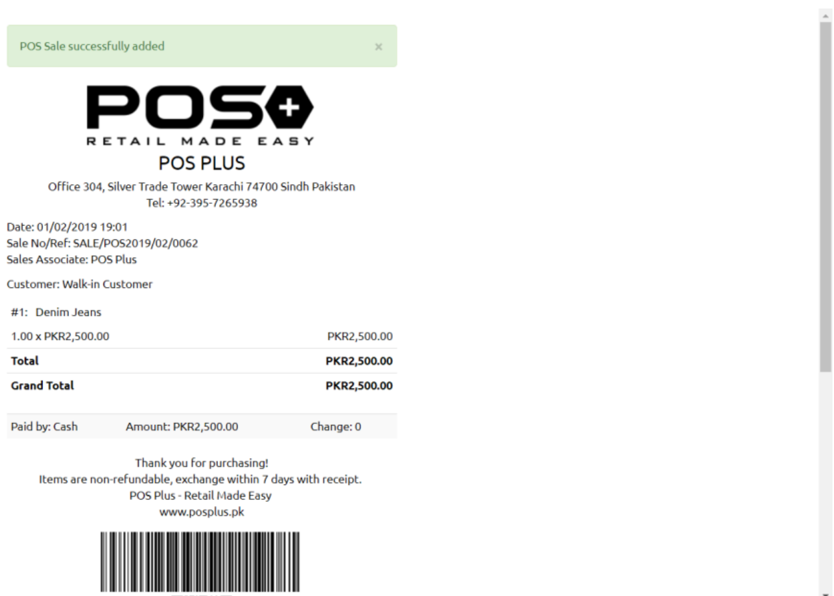
To record the payment click on Payment it will open a popup



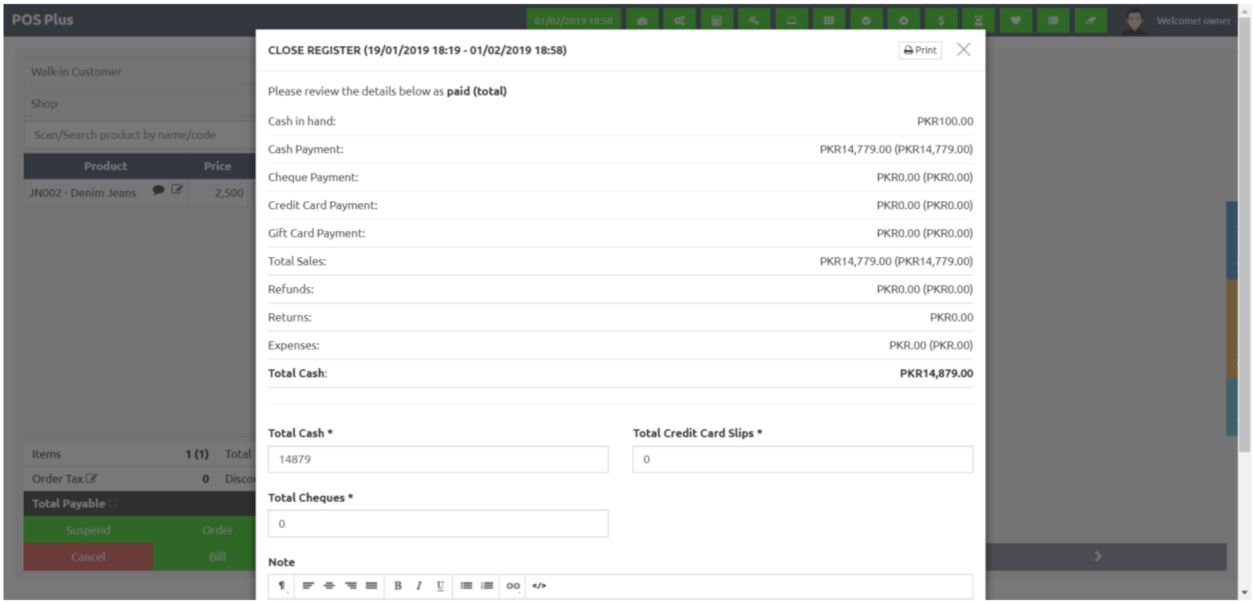
Enter the amount received from customer and click submit.

By default it will automatically open the print option

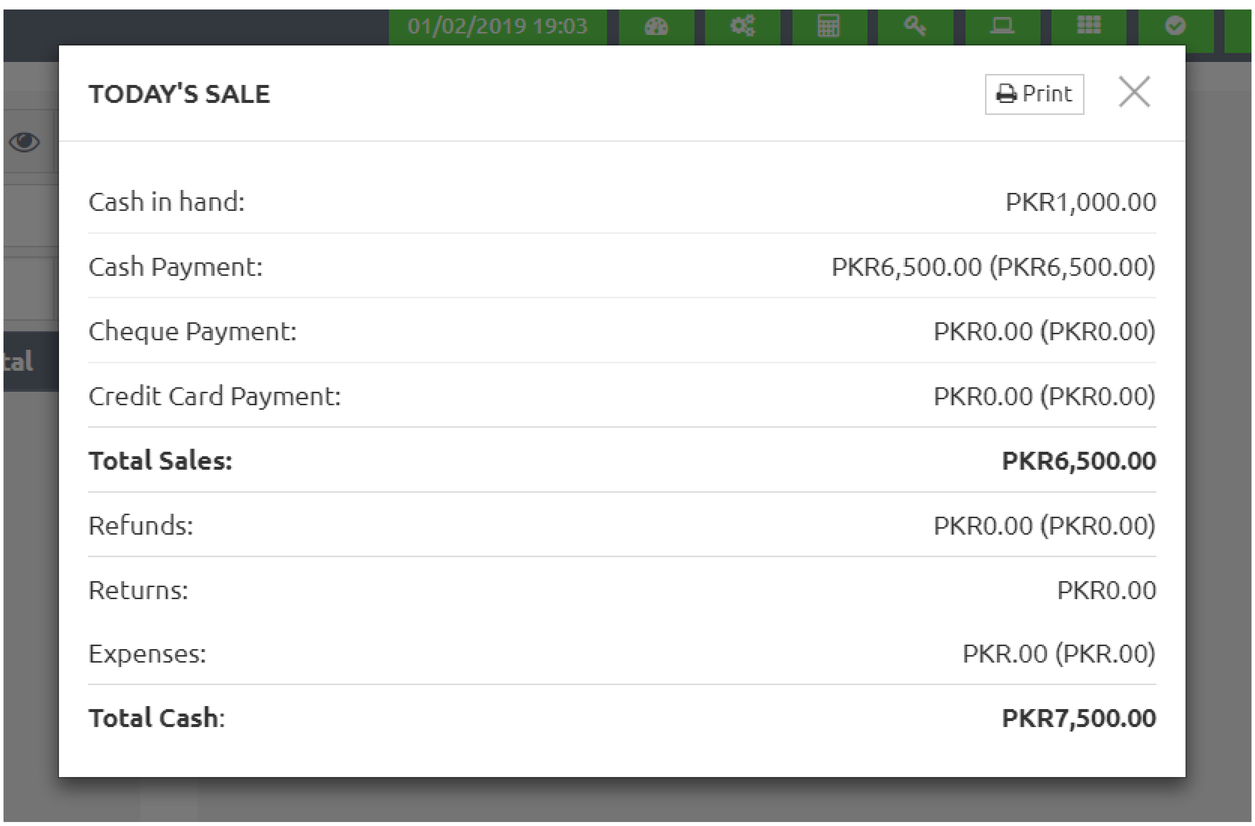
Even after you cancel you still have more options:



At the end of the day you can close your register by clicking the close register icon above.



Additionally, you can also check Today’s Sale by clicking the top icon:



You can also view Today's profit which shows the product cost of the sale:

Reports

There are various reports in the system which you can generate:

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.