



Business Sensor ERP

# USER GUIDE



**DISTRIBUTION MANAGEMENT SYSTEM**  
Your simple setup guide

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## Getting Started with Business Sensor

Welcome to Business Sensor Point of Sales. Our step-by-step guide will demonstrate just how effortless it is to manage inventory, sales, and transactions alongside your business operations. Keeping your business organized has never been easier with Business Sensor ERP Point of Sales.

### System Requirements for Business Sensor ERP

**Note:** Need to check your computer's specs? Click [here](#).

#### Operating System

- Windows 11, 64-bit, natively installed
- Windows 10, all 64-bit editions, natively installed
- Windows Server 2022, Standard and Essentials
- Windows Server 2019, Standard and Essentials
- Windows Server 2016, Standard and Essentials

#### Database Server

- Microsoft SQL Server 2017
- Microsoft SQL Server 2019

#### Hardware and operating system requirements

<b>Processor</b>	1.6 GHz minimum
<b>RAM (client or workstation)</b>	8 GB minimum
<b>RAM (Server)</b>	16 GB minimum
<b>Disk Space</b>	2.5GB of disk space (additional required for data file backup). <i>Note: For the best performance, store your Business Sensor data file on a solid-state drive (SSD)</i>

#### Minimum system requirements

The minimum requirement is a core i3 CPU(Client or workstation)

#### Software Requirement



Access the software required for Business Sensor ERP installation [here](#)

*Note: You need to register before downloading all the installation files, the registration process is below.*

- Microsoft SQL Server: Microsoft database software allows you to manage your database.
- Microsoft .Net Framework: Enables you to accomplish a range of common programming tasks, including string management, data collection, database connectivity, and file access.
- Crystal Report: allows a developer to create reports and dashboards from a variety of data sources with a minimum of code to write
- Business Sensor: This includes a Complete Accounting Package, BS Point of Sales, Hotel Reservation Management, etc.

**Server Installation:** The following software are required for Business-Sensor ERP.

- Microsoft SQL Server
- Crystal Report
- Business Sensor

**Client Installation:** The following software is required for client-side installation

- Crystal Report
- Business Sensor

**Note:** Download all the software needed [here](#)

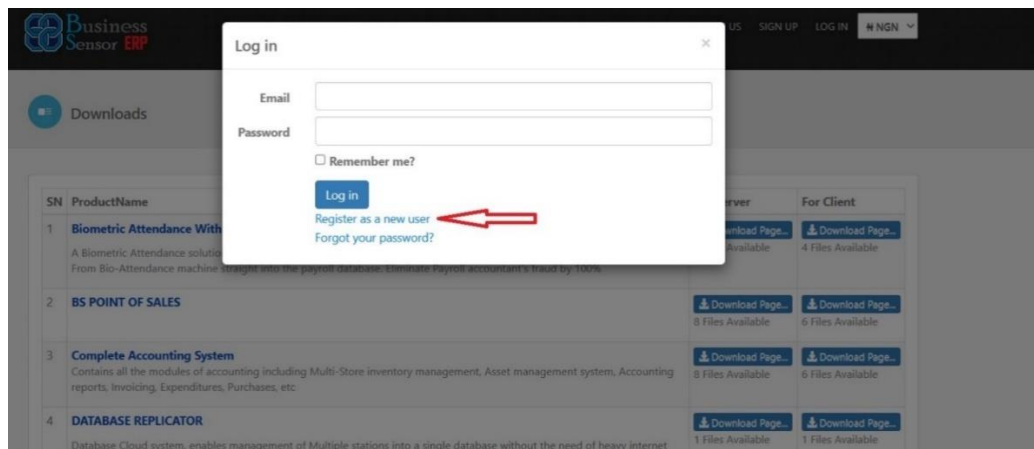
**[Register and Configure Business Sensor Distribution Management Software](#)**

Please note that for all downloads, you should visit our website and click on the [download button](#) to access the Management Studio file. Follow these steps to register and download the software

**Step 1:** Click the “Download Page” button.

SN	ProductName	For Server	For Client
1	<b>Biometric Attendance With Integrated Payroll</b> A Biometric Attendance solution that is integrated with Payroll and HR system. Eliminate employee time theft without stress. From Bio-Attendance machine straight into the payroll database. Eliminate Payroll accountant's fraud by 100%	<a href="#">Download Page...</a> 6 Files Available	<a href="#">Download Page...</a> 4 Files Available
2	<b>BS POINT OF SALES</b>	<a href="#">Download Page...</a> 8 Files Available	<a href="#">Download Page...</a> 6 Files Available
3	<b>Complete Accounting System</b> Contains all the modules of accounting including Multi-Store inventory management, Asset management system, Accounting reports, Invoicing, Expenditures, Purchases, etc	<a href="#">Download Page...</a> 8 Files Available	<a href="#">Download Page...</a> 6 Files Available
4	<b>DATABASE REPLICATOR</b> Database Cloud system, enables management of Multiple stations into a single database without the need of heavy internet bandwidth nor VPN. Just use any available internet connection and you are good to go	<a href="#">Download Page...</a> 1 Files Available	<a href="#">Download Page...</a> 1 Files Available
5	<b>DISTRIBUTION MANAGEMENT SYSTEM</b> Multi-Store based inventory system, Unlimited units of measure setup per inventory item, Works with cloud database for stress free integration of multiple stations WITHOUT using VPN	<a href="#">Download Page...</a> 8 Files Available	<a href="#">Download Page...</a> 6 Files Available
6	<b>EXAMS AND RECORDS</b> Makes Exams and Record management as easy as ever. Has a windows based module that connects with a cloud account. The web portal can complete student self management	<a href="#">Download Page...</a> 6 Files Available	<a href="#">Download Page...</a> 4 Files Available

**Step 2:** Choose 'Register as a new user' to create an account, or enter your log in credentials.



**Step 3:** Complete the form with the necessary information and then click the 'Signup' button.

**Login Detail**

---

**Email**

**Password**

**Confirm password**

**Organization/Contact Person's Detail**

---

**OrganizationName**

**Contact Person**

**Contact person's Designation**

**Contact person's Phone**

**Organization Address**

**City**

**State/Province**

**Country**

**Profile Picture** Choose File... Remove

**What is 9 MINUS 5**

[Signup](#)

**Step 4:** Once you have successfully signed up, click on the download link.

The screenshot shows the user interface of Business Sensor ERP. The top navigation bar contains the following links: HOME, ABOUT US, PRODUCTS, DOWNLOADS, SUPPORT, CONTACT US, MY ACCOUNT, and a currency selector set to NGN. A red arrow points to the 'DOWNLOADS' link. Below the navigation bar, the user's account details for 'demo1' are displayed. The account overview shows 'demo1- Your Account Detail'. The main content area is divided into six service cards, each with a 'Detail...' button:

- Device Licenses:** Business Sensor ERP Licenses for demo1. Licenses : 0.
- Email Reporting Service:** Daily Email Reporting Service Subscriptions. Subscriptions : 0.
- Upgrade Insurance:** Upgrade Insurance Subscriptions. Subscriptions : 0.
- Cloud Comprehensive Report:** Cloud Comprehensive Report Subscriptions. Subscriptions : 0.
- Organization Profile:** Profile for demo1.
- Wallet Balance:** Account Wallet Balance Deposites.

**Step 5:** Afterward, click the 'Download Page' button to access the installation files for Business Sensor Distribution Management Software.

SN	ProductName	For Server	For Client
1	<b>Biometric Attendance With Integrated Payroll</b> A Biometric Attendance solution that is integrated with Payroll and HR system. Eliminate employee time theft without stress, From Bio-Attendance machine straight into the payroll database. Eliminate Payroll accountant's fraud by 100%	<a href="#">Download Page...</a> 6 Files Available	<a href="#">Download Page...</a> 4 Files Available
2	<b>BS POINT OF SALES</b>	<a href="#">Download Page...</a> 8 Files Available	<a href="#">Download Page...</a> 6 Files Available
3	<b>Complete Accounting System</b> Contains all the modules of accounting including Multi-Store inventory management, Asset management system, Accounting reports, Invoicing, Expenditures, Purchases, etc	<a href="#">Download Page...</a> 8 Files Available	<a href="#">Download Page...</a> 6 Files Available
4	<b>DATABASE REPLICATOR</b> Database Cloud system, enables management of Multiple stations into a single database without the need of heavy internet bandwidth nor VPN. Just use any available internet connection and you are good to go	<a href="#">Download Page...</a> 1 Files Available	<a href="#">Download Page...</a> 1 Files Available
5	<b>DISTRIBUTION MANAGEMENT SYSTEM</b> Multi-Store based inventory system, Unlimited units of measure setup per inventory item, Works with cloud database for stress free integration of multiple stations WITHOUT using VPN	<a href="#">Download Page...</a> 8 Files Available	<a href="#">Download Page...</a> 6 Files Available
6	<b>EXAMS AND RECORDS</b> Makes Exams and Record management as easy as ever. Has a windows based module that connects with a cloud account. The web portal can complete student self management	<a href="#">Download Page...</a> 6 Files Available	<a href="#">Download Page...</a> 4 Files Available
7	<b>Hotel Reservation ERP with Inventory, Accounting and KeyCard Lock Integration</b> Benefits of using a hotel management ERP system with integrated accounting and inventory management modules:	<a href="#">Download Page...</a> 8 Files Available	<a href="#">Download Page...</a> 6 Files Available

**Step 6:** Click all the 'Download' buttons to download all the installation files needed to get Business Sensor Distribution Management Software up and running and then install them.

The screenshot shows a web browser window with the URL: <https://www.businesssensor.com/Product/Downloads?productid=6&productName=BS%20POINT%20OF%20SALES&mode=Server#>. The page displays a table of files to be downloaded:

ID	File Name	Description	Size	Date	Action	
3	BusinessSensor File	CRRruntime_32bit_13_0_23	Crystal Report Runtime 13-0-23 32 Bit	92.7 MB	13 Jun, 2021	<a href="#">Download</a>
4	BusinessSensor File	CRRruntime_64bit_13_0_23	Crystal Report Runtime 13-0-23 64 Bit	91.9 MB	13 Jun, 2021	<a href="#">Download</a>
5	BusinessSensor File	Crystal Report Runtime 16	Crystal Report Runtime 16	74.1 MB	13 Jun, 2021	<a href="#">Download</a>
6	Dependency File	Dot Net Framework 4.0	Microsoft Dotnet Framework 4.0 Installation file download		13 Jun, 2021	<a href="#">Download</a>
7	Dependency File	Microsoft® SQL Server® 2012 Express With Tools 32bit	Microsoft® SQL Server® 2012 Express is a powerful and reliable free data management system that delivers a rich and reliable data store for lightweight Web Sites and desktop applications		13 Jun, 2021	<a href="#">Download</a>
8	Dependency File	Microsoft SQL Server Management Studio 19.1	Microsoft® SQL Server® 2012 Express is a powerful and reliable free data management system that delivers a rich and reliable data store for lightweight Web Sites and desktop applications		13 Jun, 2021	<a href="#">Download</a>

*Note: After the files have finished downloading, the next step is the SQL installation process*

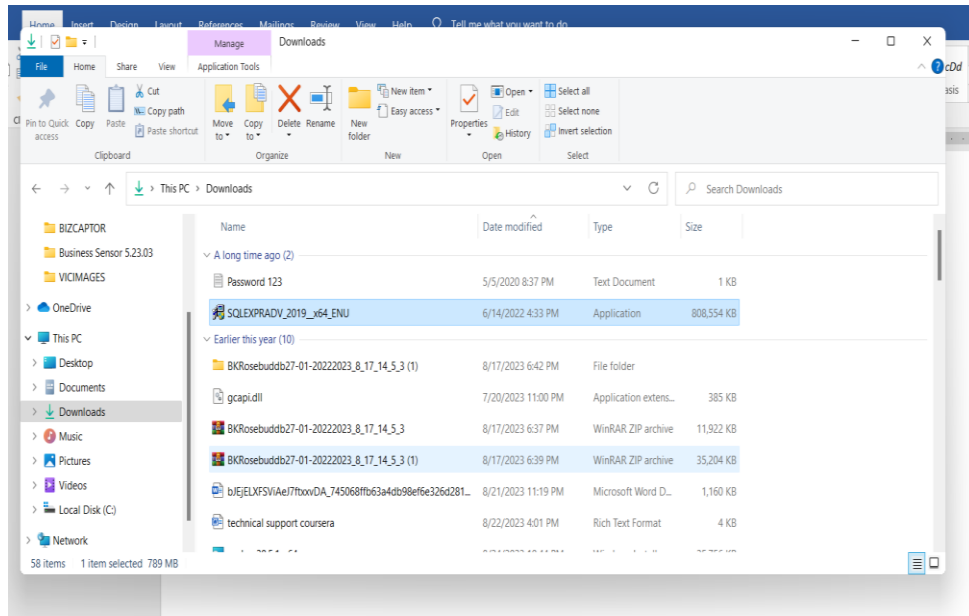


## Install and Configure SQL 2019 Management Studio

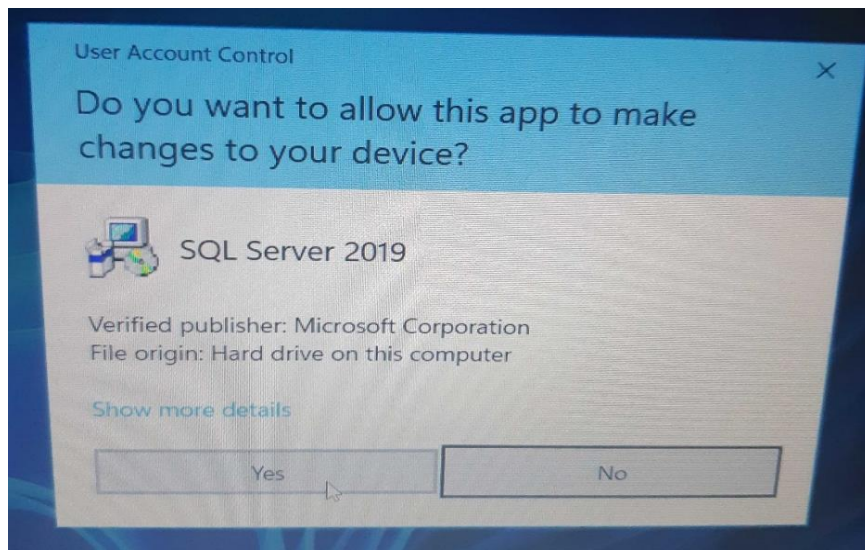
### Step 1.

Double-click the downloaded SQL Server file.

*Note: The downloaded file may be in the default download folder on your PC or your choice folder*

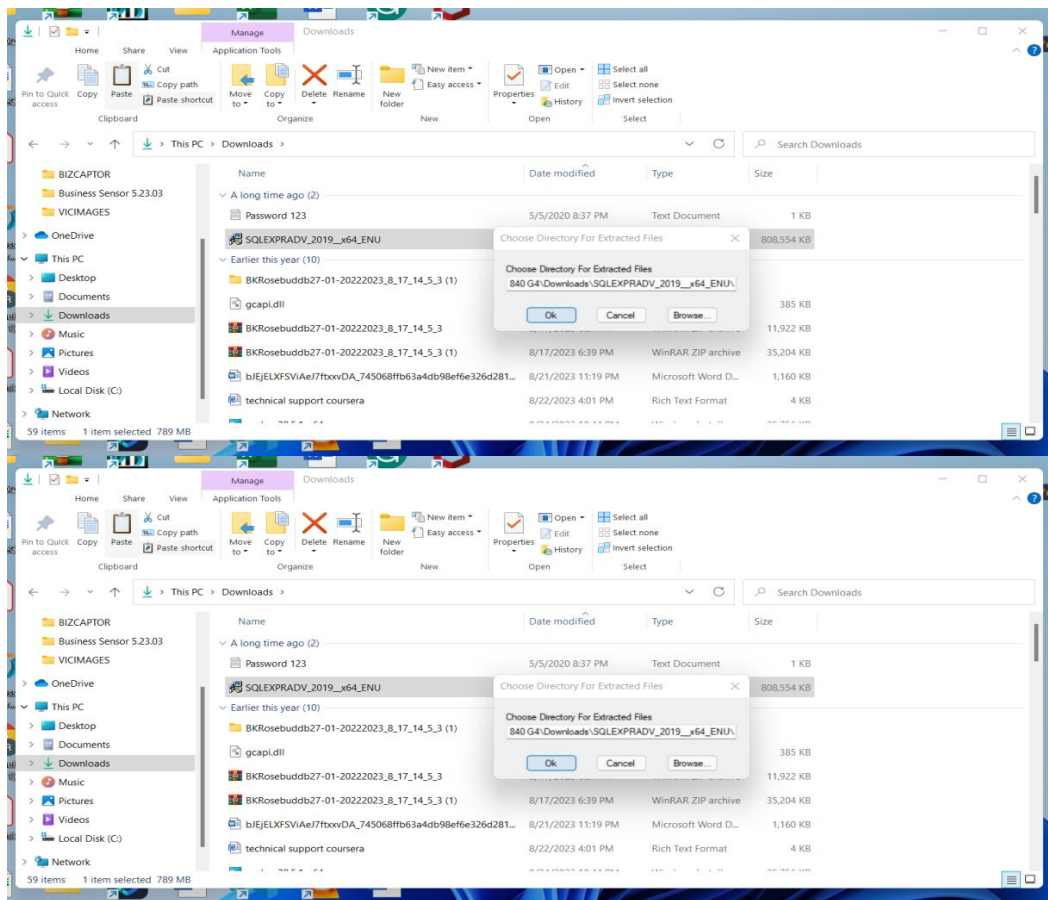


*Note: If your computer requests for “User Account Control” authentication, click Yes*



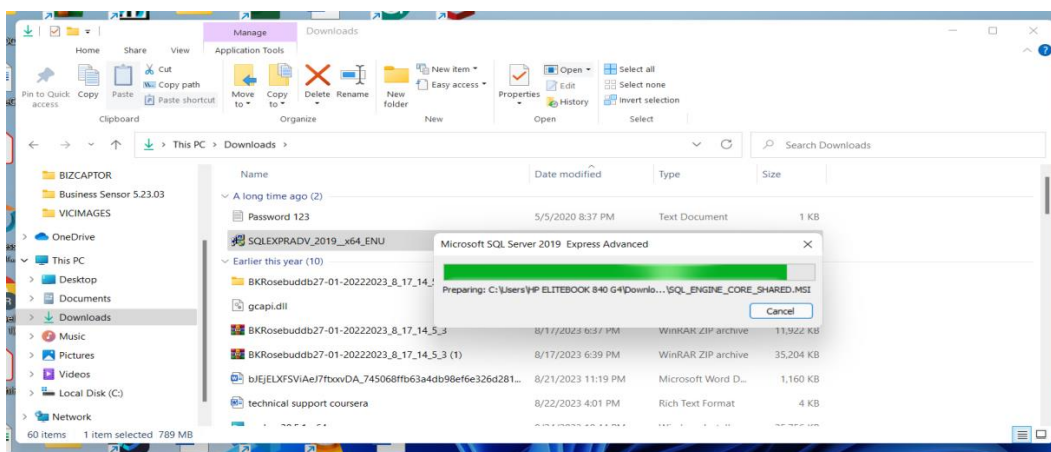
## Step 2.

Click the OK button to select the default directory to save the extracted file.



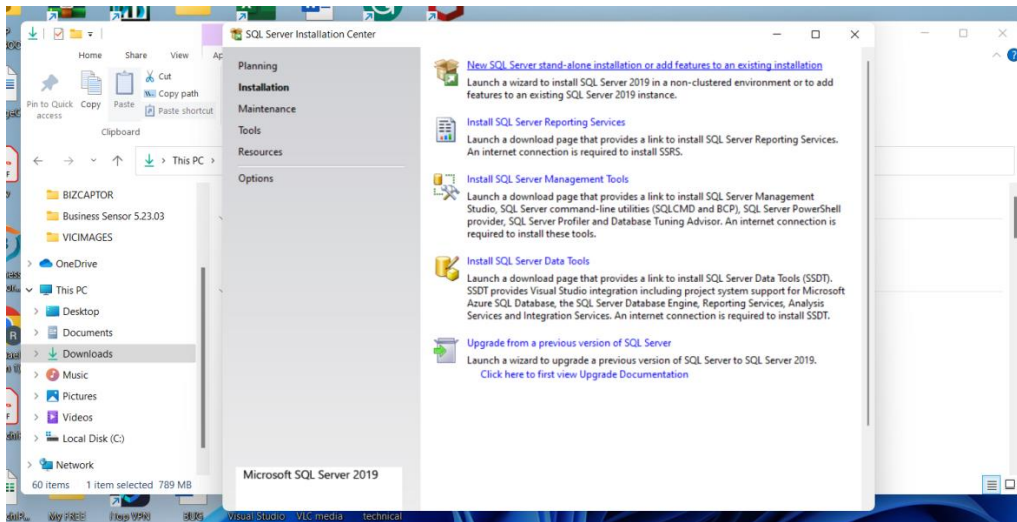
## Step 3.

Wait for Windows to extract the file for installation.

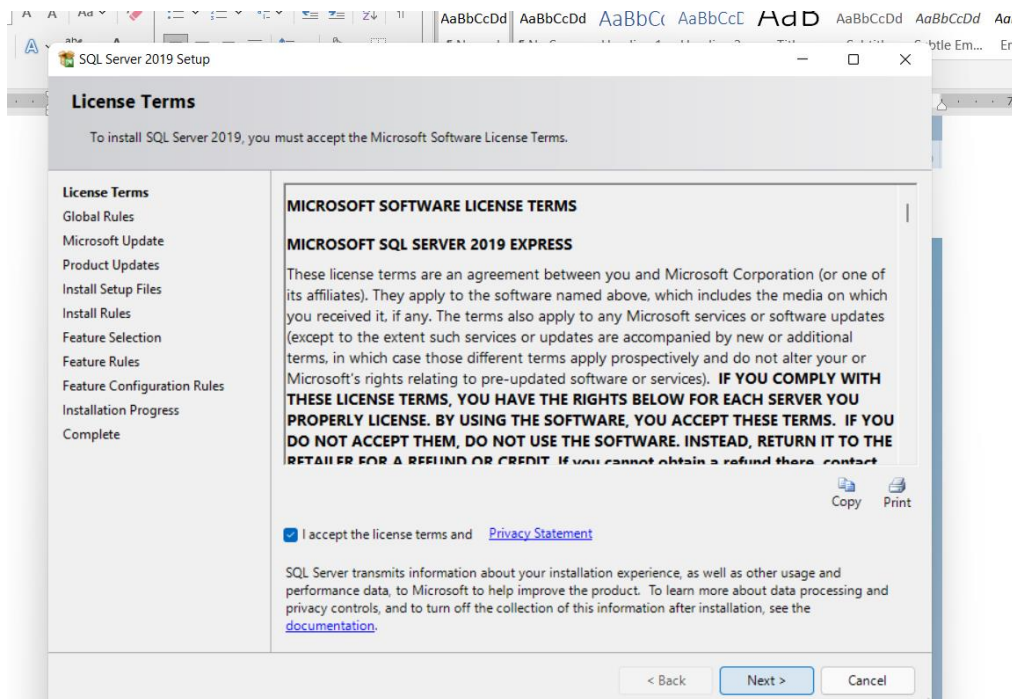


## Step 4.

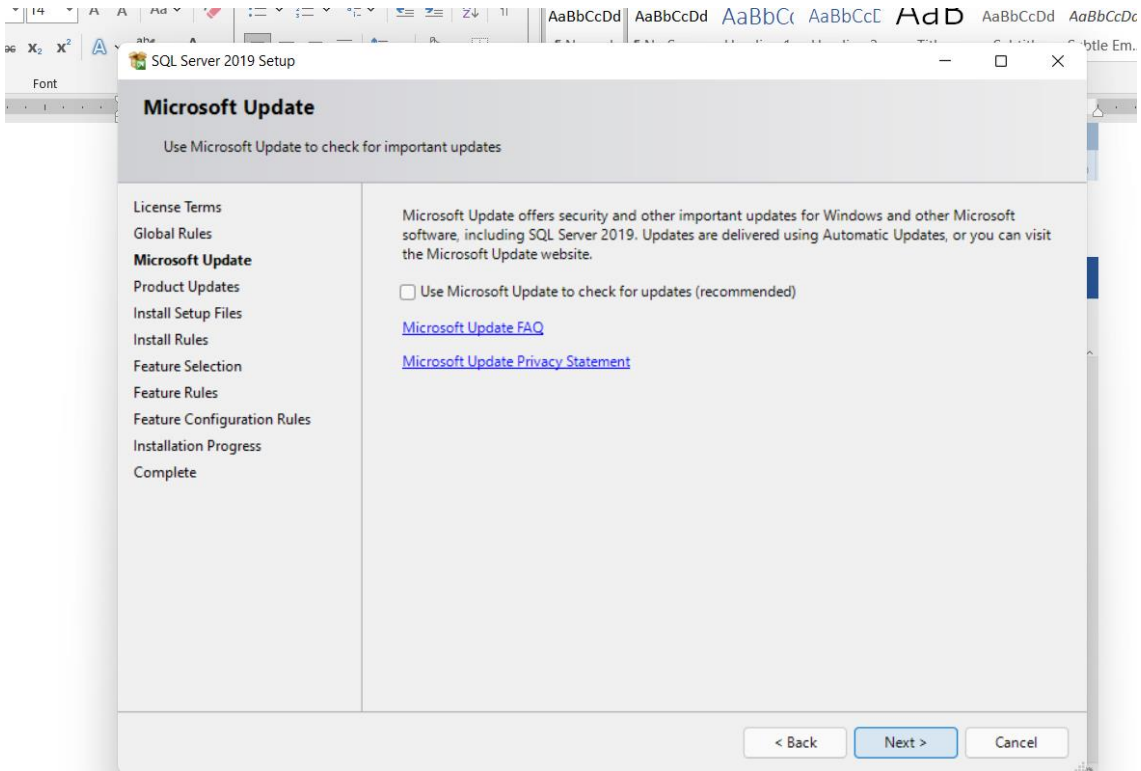
Select the first option: **“New SQL Server stand-alone installation or add features to an existing installation”** Click **Next** for a new installation to begin.



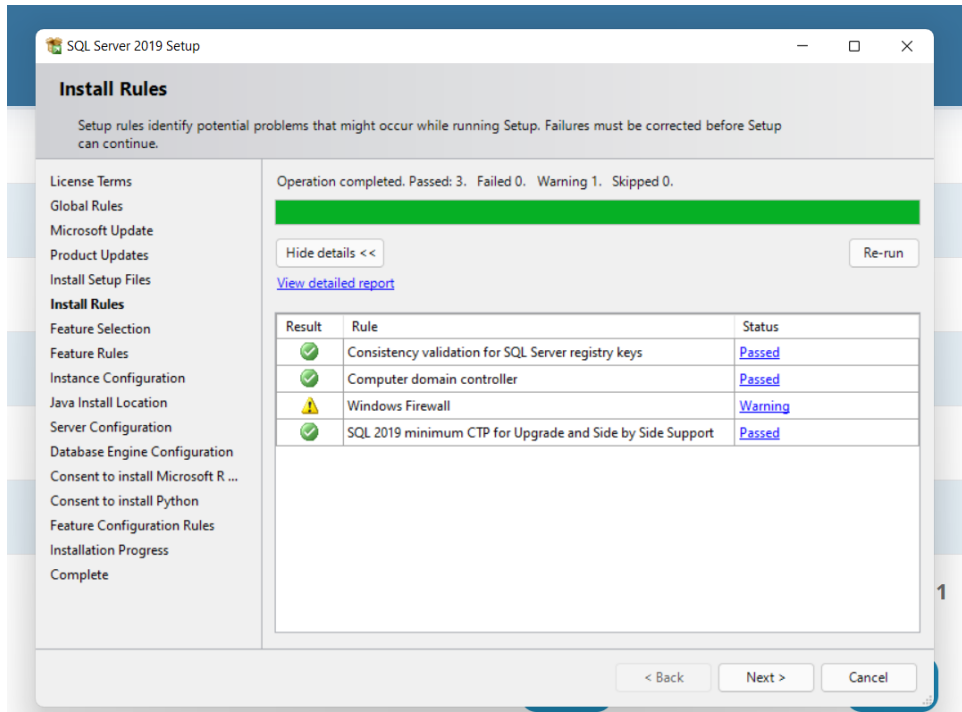
**Step 5.**  
Check the **“I accept the license terms”** box and click Next



**Step 6.**  
In the **“Product Update”** page, Click **Next** to proceed to the next page



**Step 7.**  
 In the "Install Rules" Page, click on the Next button.

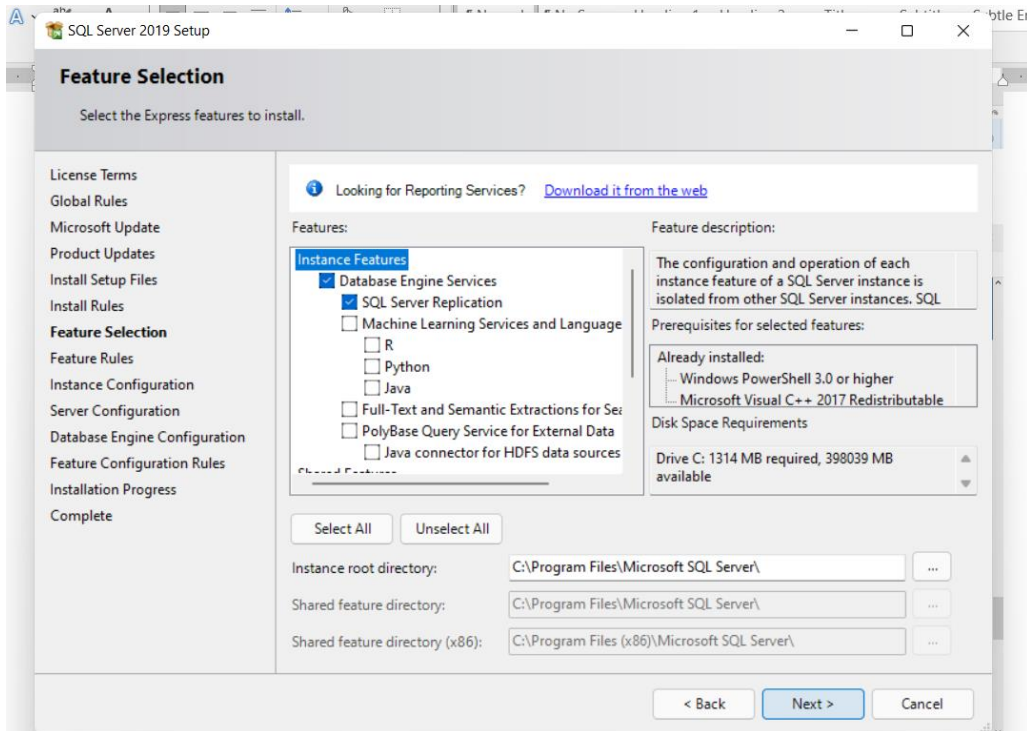


**Step 8.**



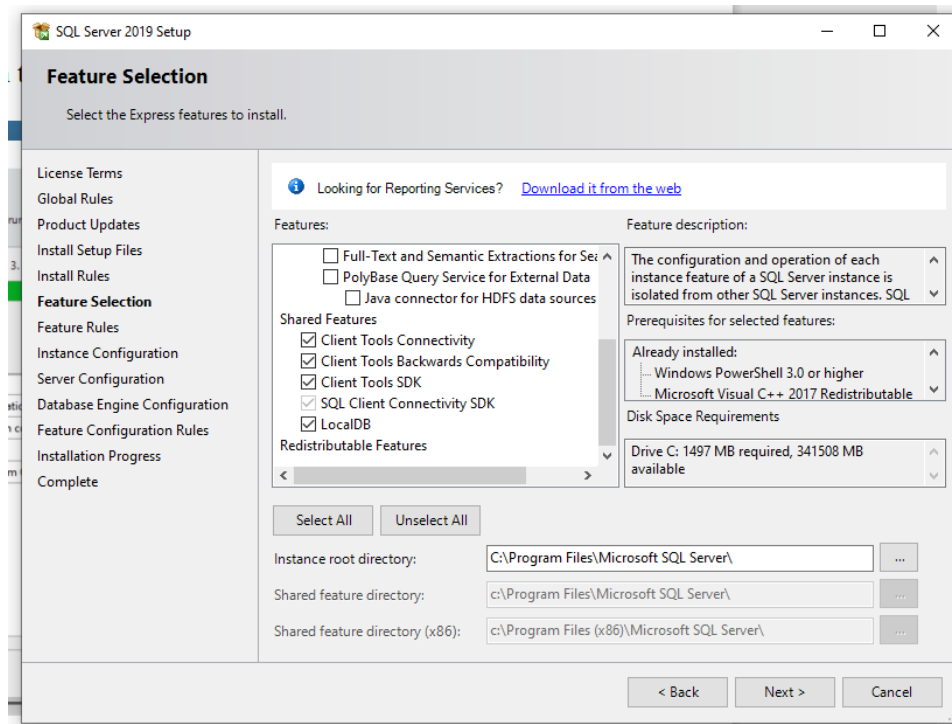
In the **Feature Selection** page, make sure you select:

- a) Database Engine Services
- b) SQL Replication



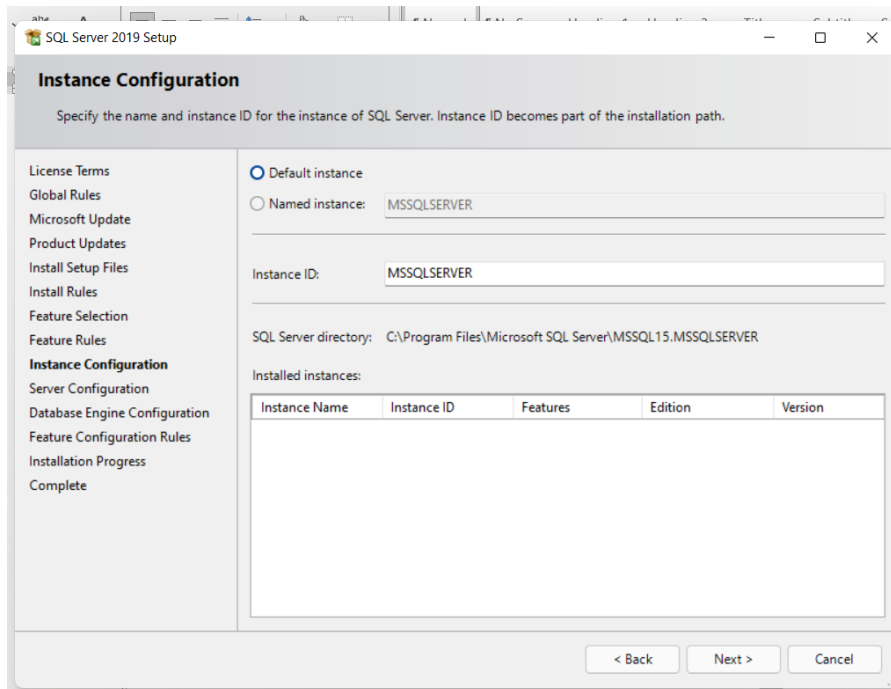
- c) Client Tools Connectivity
- d) Client Tools Backwards compatibility and Client tools SDK.
- e) LocalDB

Click on the **Next** button.



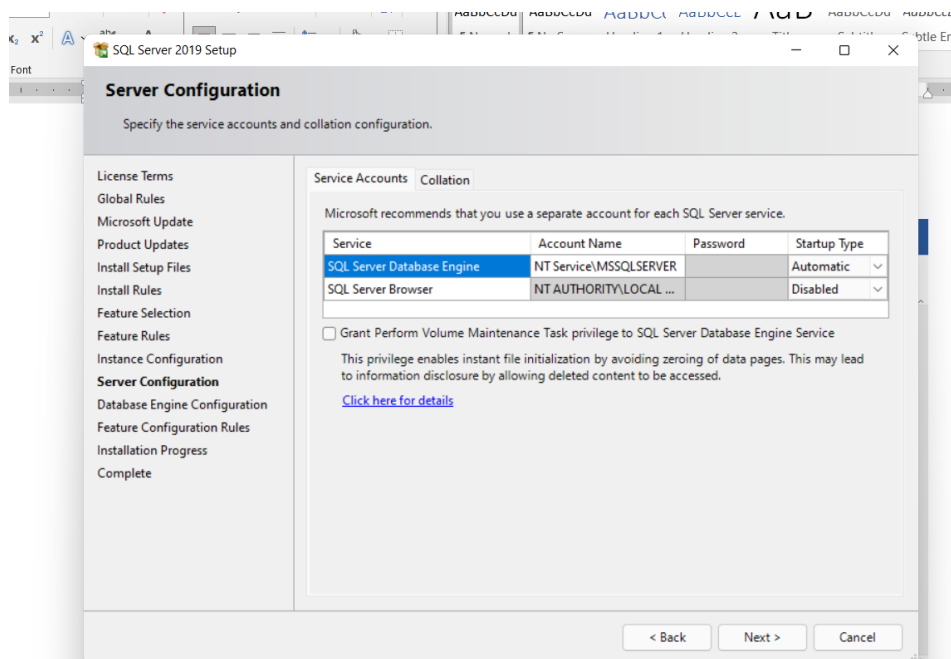
### Step 9.

In the **Instance Configuration** page, check the **Named Instance** and click the **Next** button.



### Step 10.

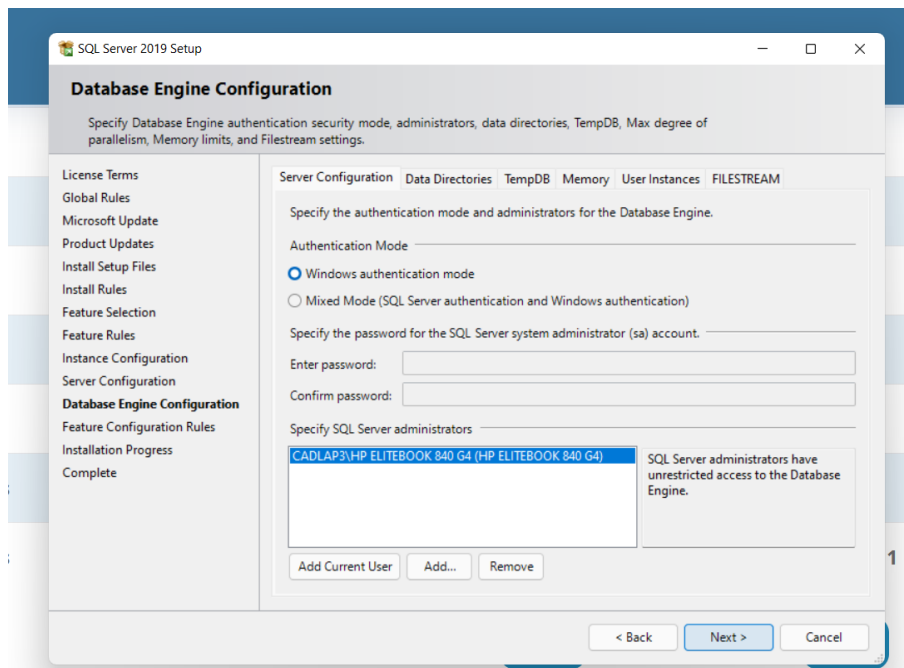
In the **Server Configuration** page, click next to load the next page.



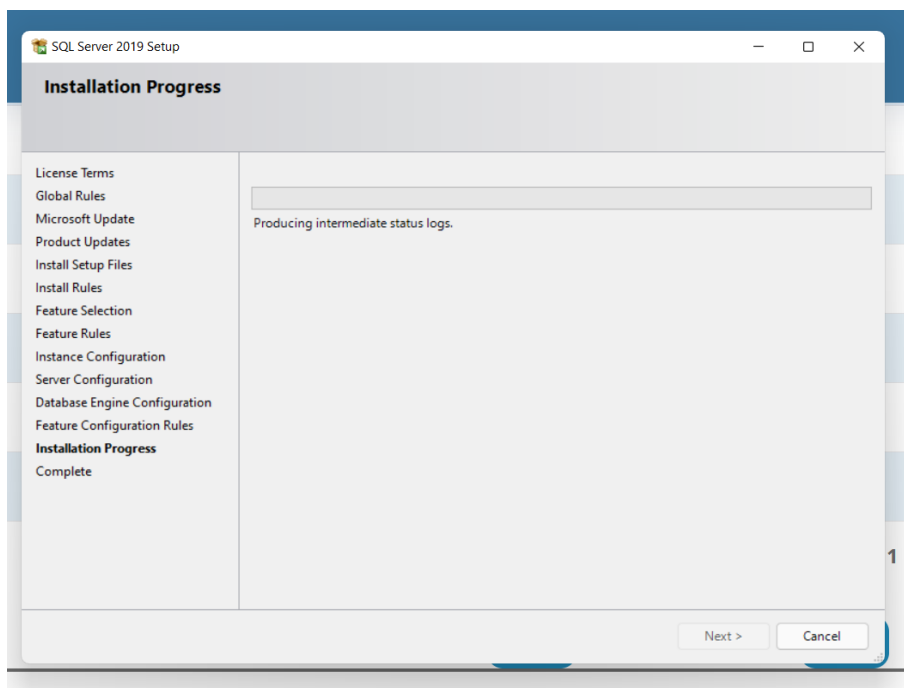
### Step 11.

In the **Database Engine Configuration** page, either check "Mixed Mode (SQL Server authentication and Windows authentication)" and provide the password for the SQL Server system administrator account **or** check "**Windows authentication mode**" and

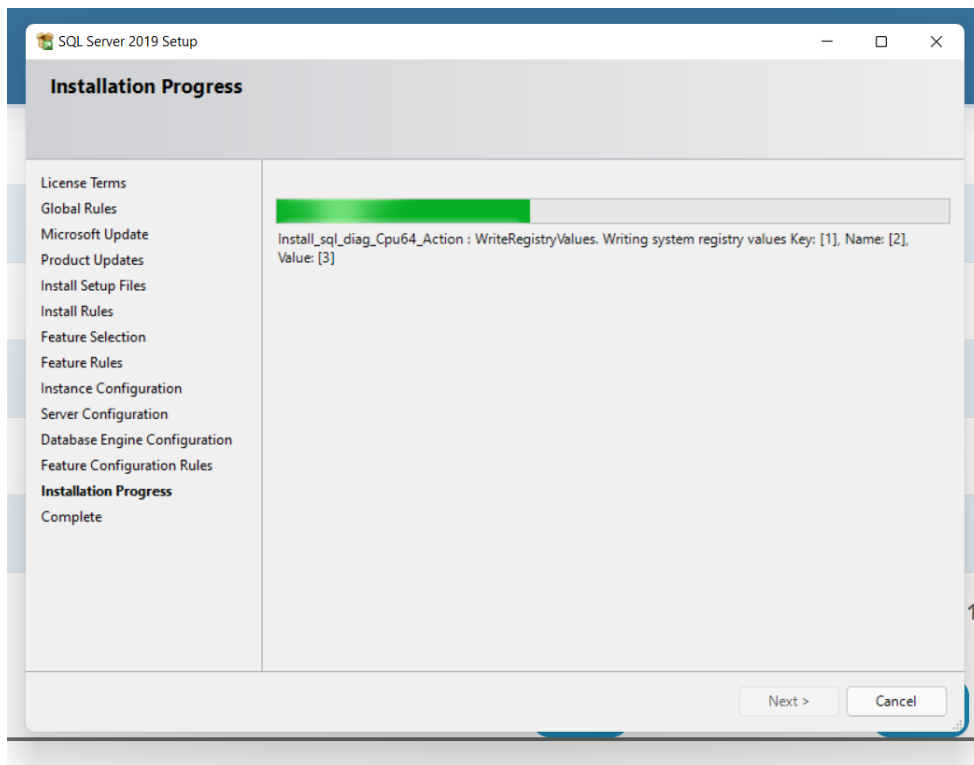
configure your SQL Server Management Studio later (*Check the configuration after the installation*). Click the **Next** button after your option.



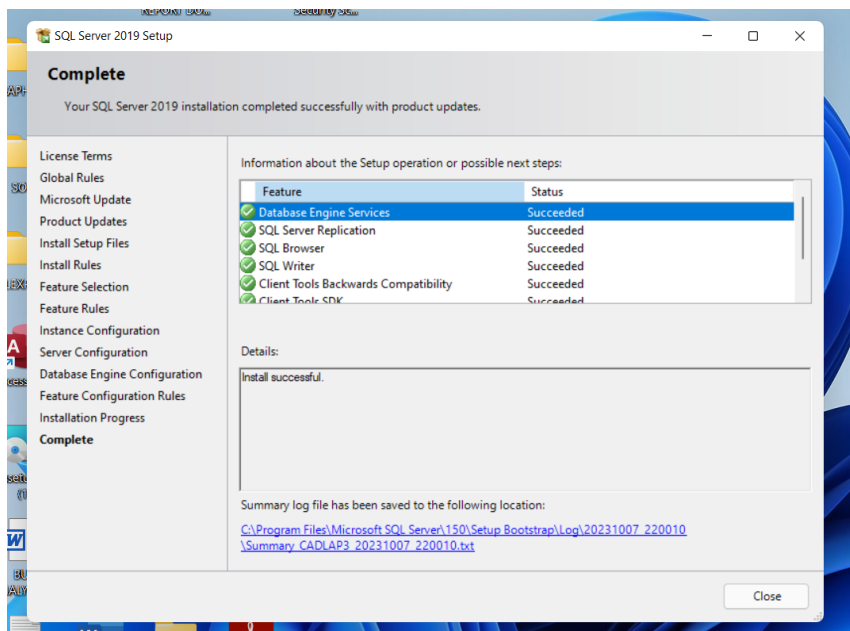
**Step 12:** Wait for the installation progress to start.



**Step 13:** *Note: If the message about the restarting of your server appears, click **OK** button.*



**Step 14.** Finally, on the "Complete" page, click on the **Close** button to exit the application.

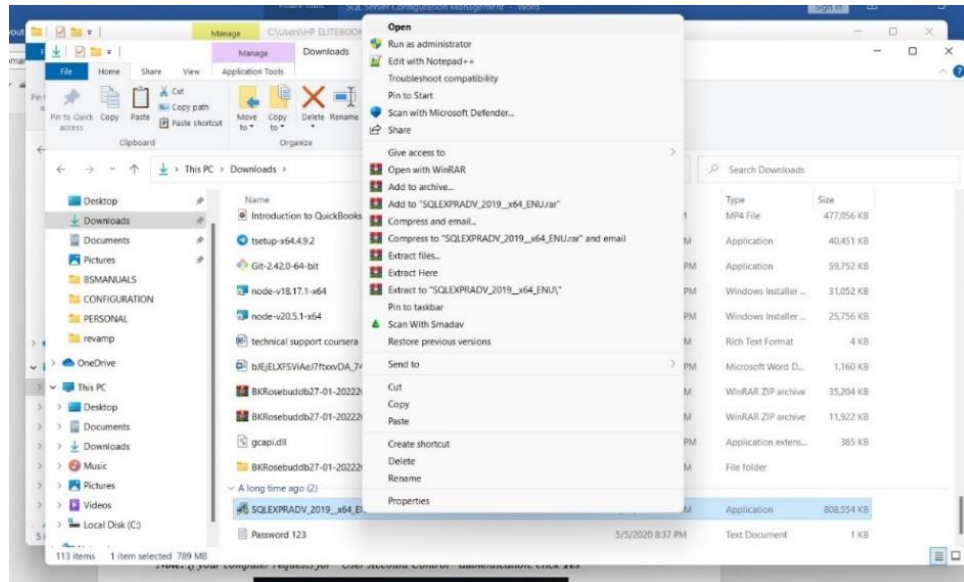




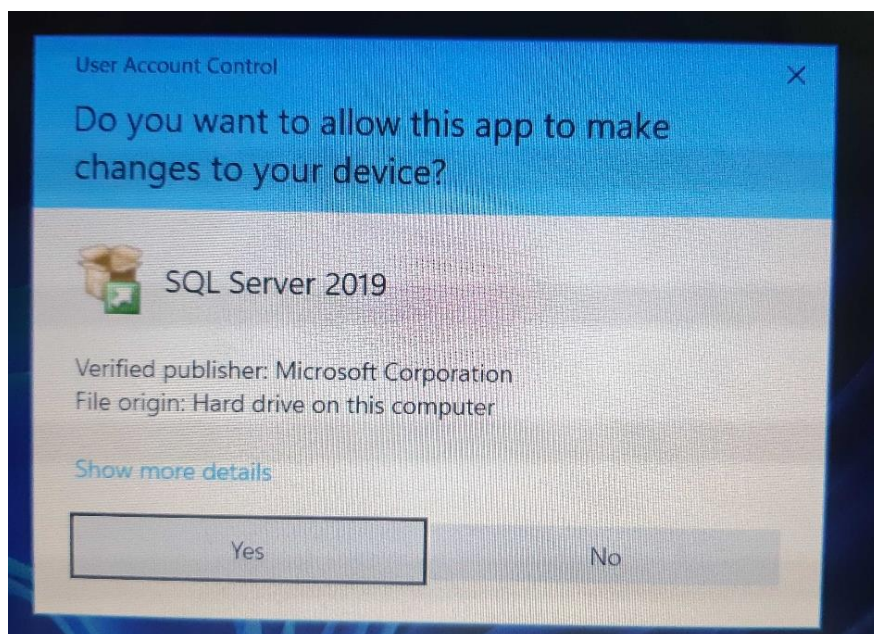
This is done immediately the SQL server is successfully installed. The following steps illustrates the configuration: *Note: No need to download another SQL file, Access the already downloaded SQL Server file and follow the steps stated:*

### Step 1.

Double click the setup file or right click and click Open.

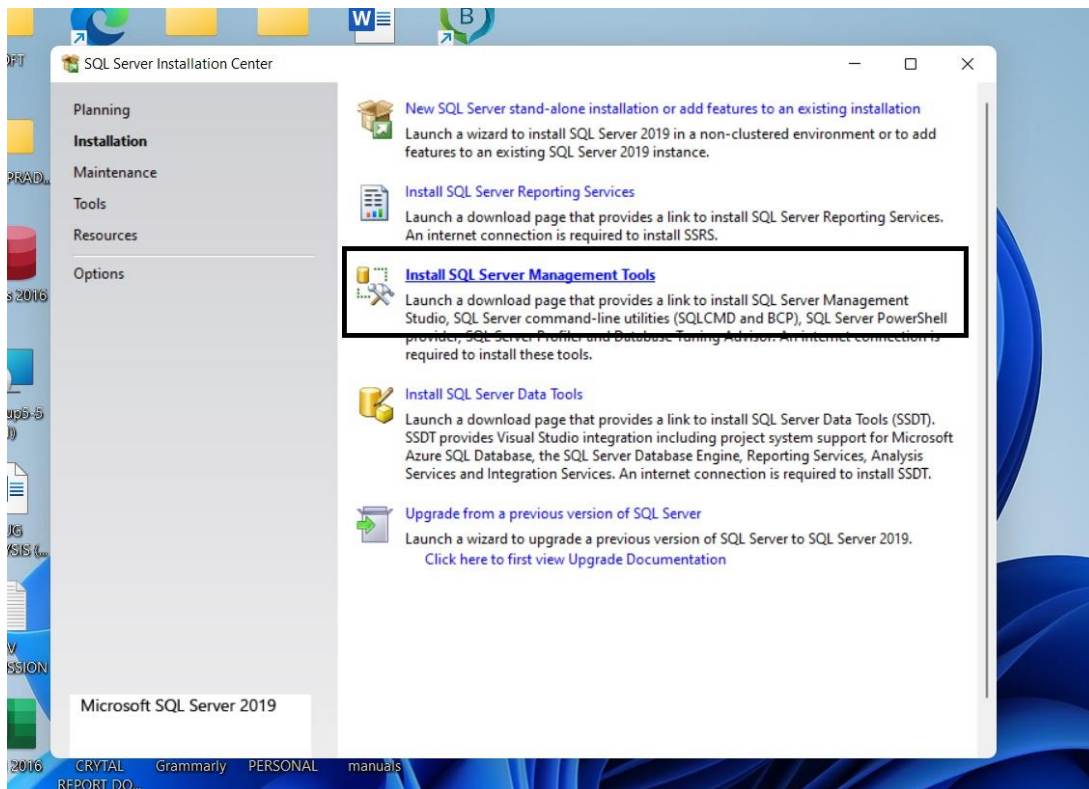


*Note: If your computer requests for “User Account Control” authentication, click Yes*



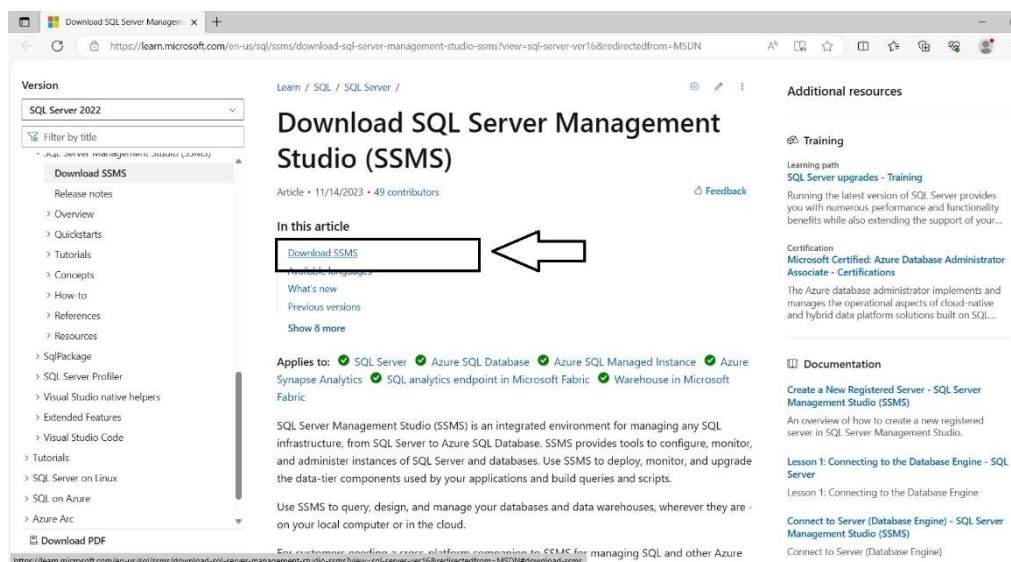
### Step 2.

After the user account control authentication, the installation page will be displayed, then select Install SQL Server Management Tools.



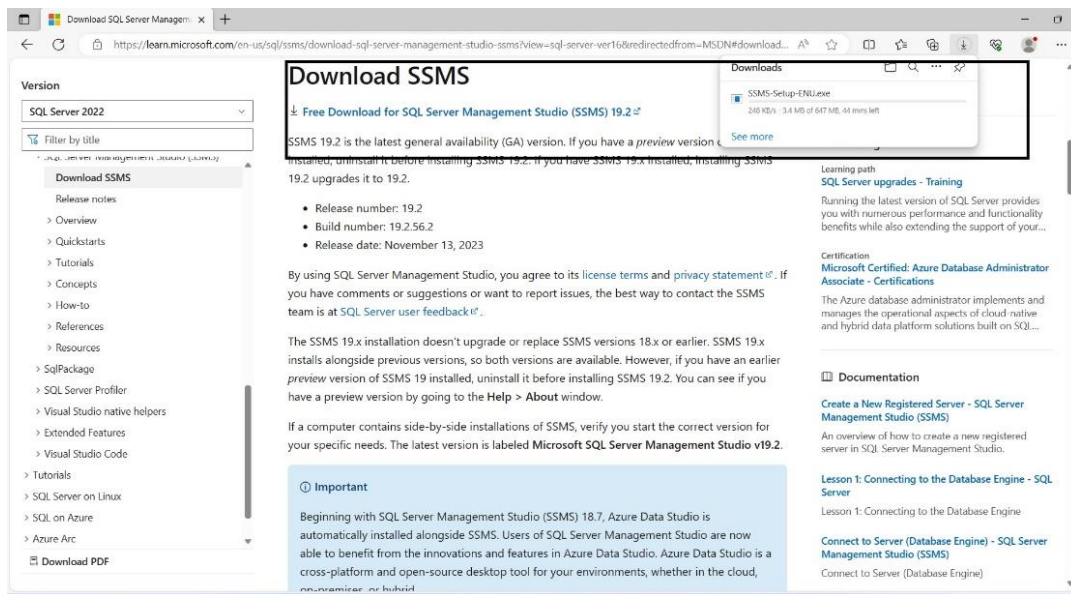
### Step 3.

You will be directed to an online platform where you need to download the appropriate tool for the studio. Please select Download SSMS. *Note, make sure you are connected to the internet for the proper downloading.*



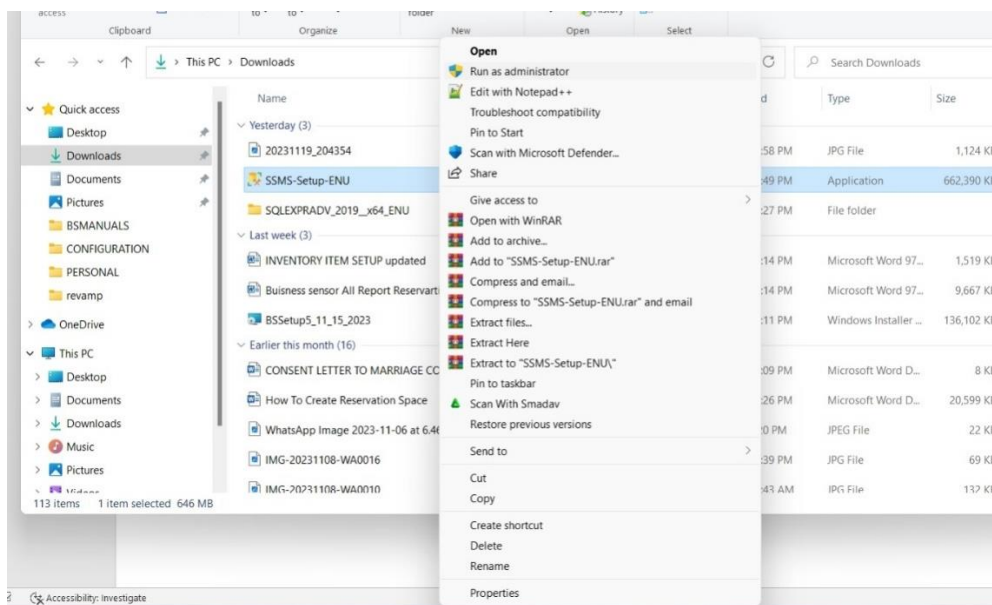
### Step 4.

Click on Free Download for SQL Server Management Studio (SSMS) 19.2. Then the download will start.



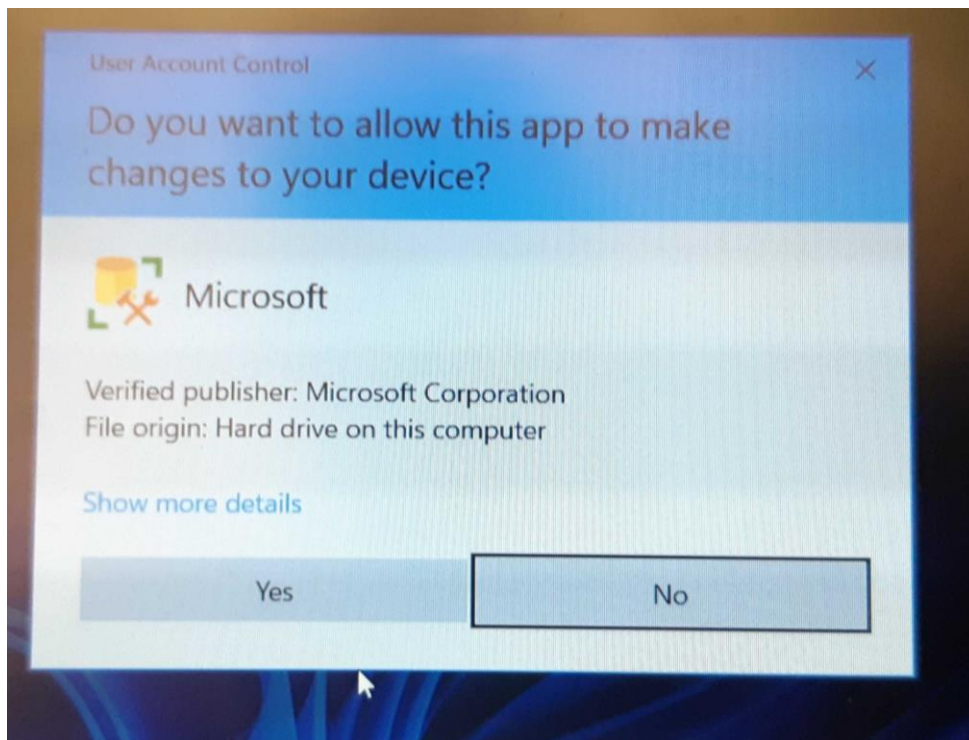
## Step 5.

After the download, access the SSMS downloaded, then right click on the file and click open to start the installation.



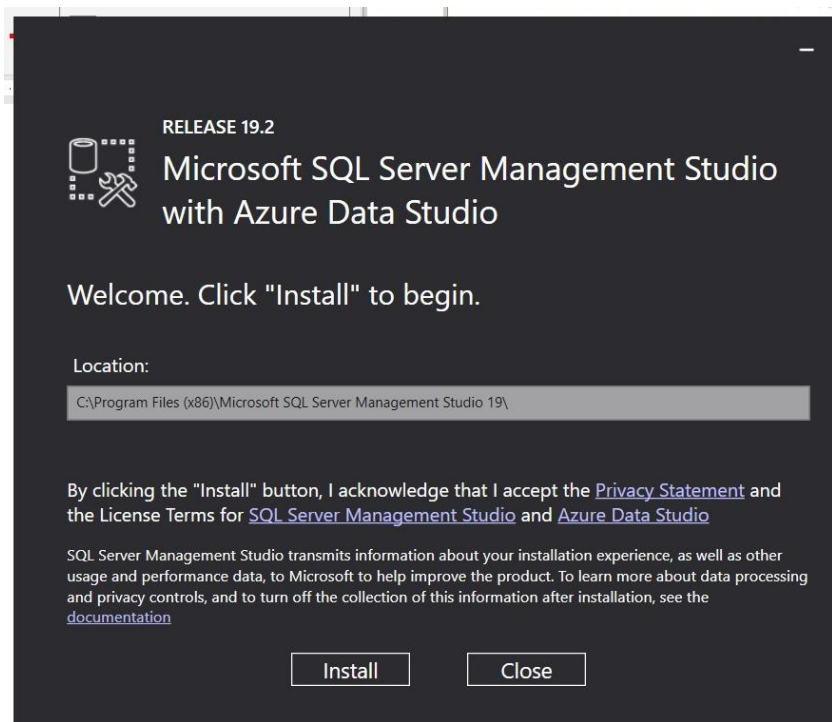
*Note: If your computer requests for "User Account Control" authentication, click Yes*





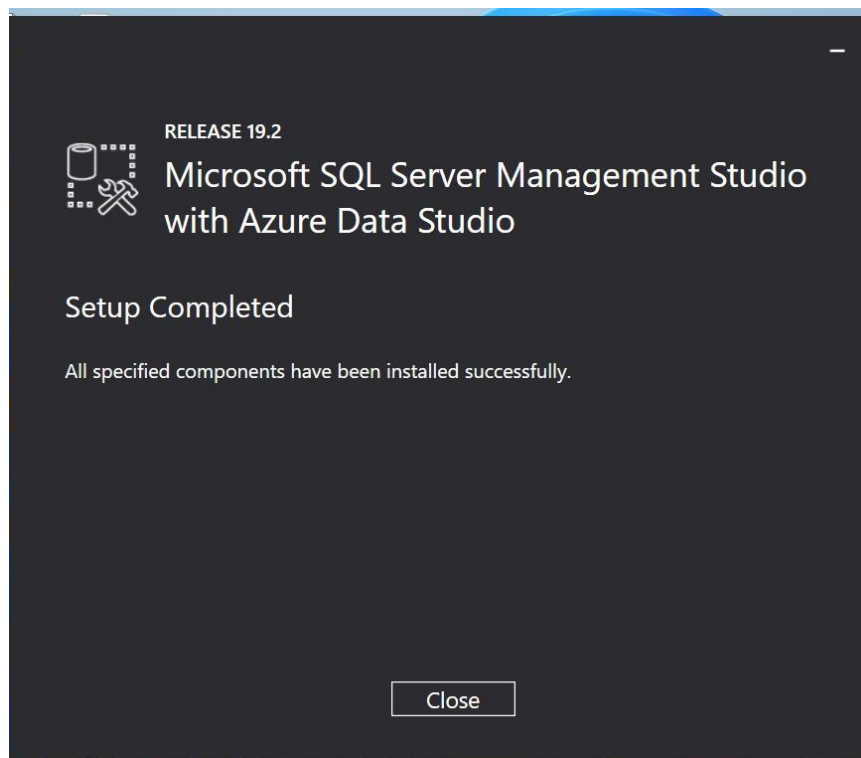
**Step 6.**

Click on Install button to start the installation process.



### Step 7.

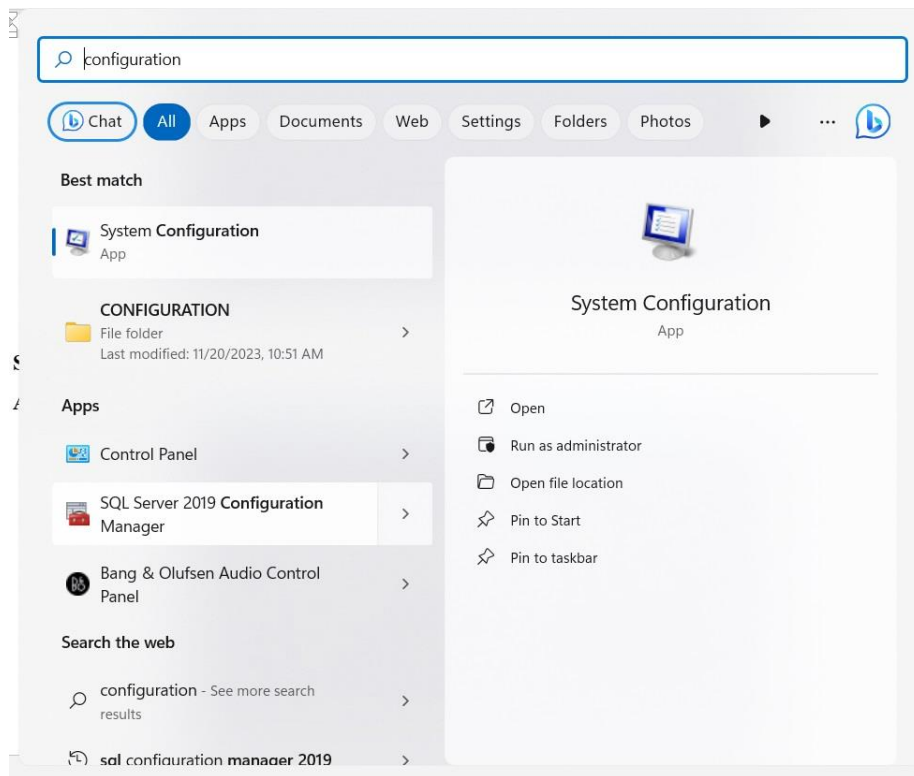
After the installation is complete, please click the 'Close' button to exit.



The next steps are the configuration process

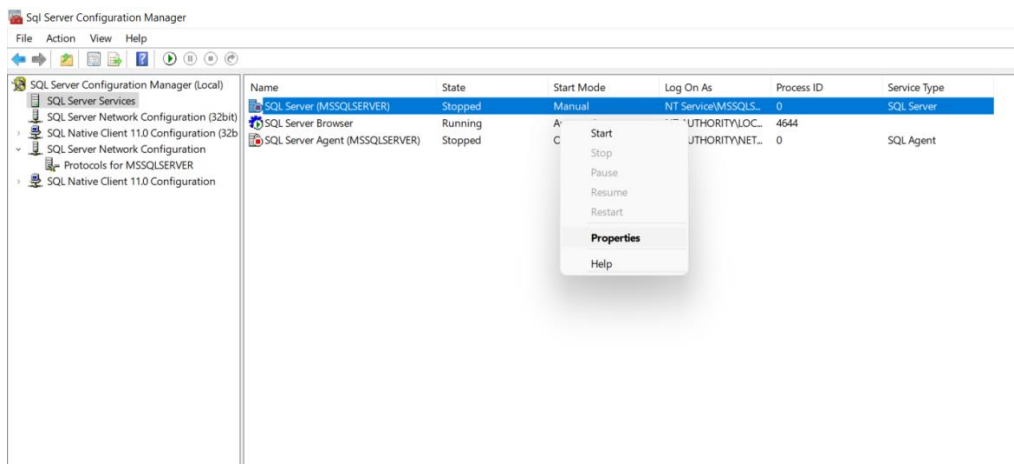
### Step 1.

Click on the Start button and type “configuration manager”. From the list displayed, click on “SQL Server 2019 Configuration Manager”.



## Step 2.

After opening it, navigate to SQL Server Services and click. On the right side of the screen, ensure that the Start Mode for SQL Server (MSSQLSERVER) is set to automatic. If not, right-click on the Start Mode column and select properties

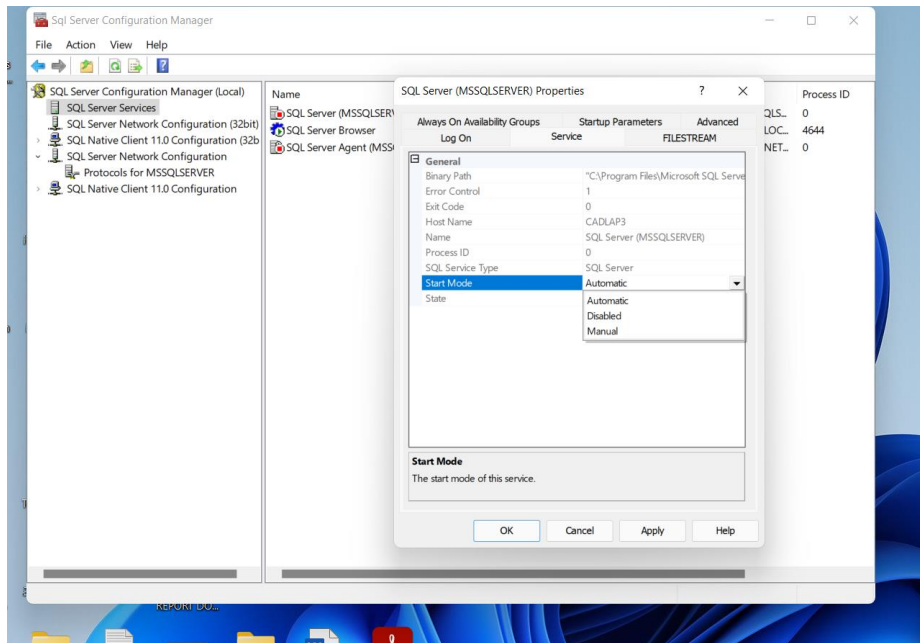


## Step 3.

Click on Service tab and navigate to Start Mode, in front of Start Mode is Disabled our aim is to enable it, click on it and select Automatic. It means this service will start automatically.

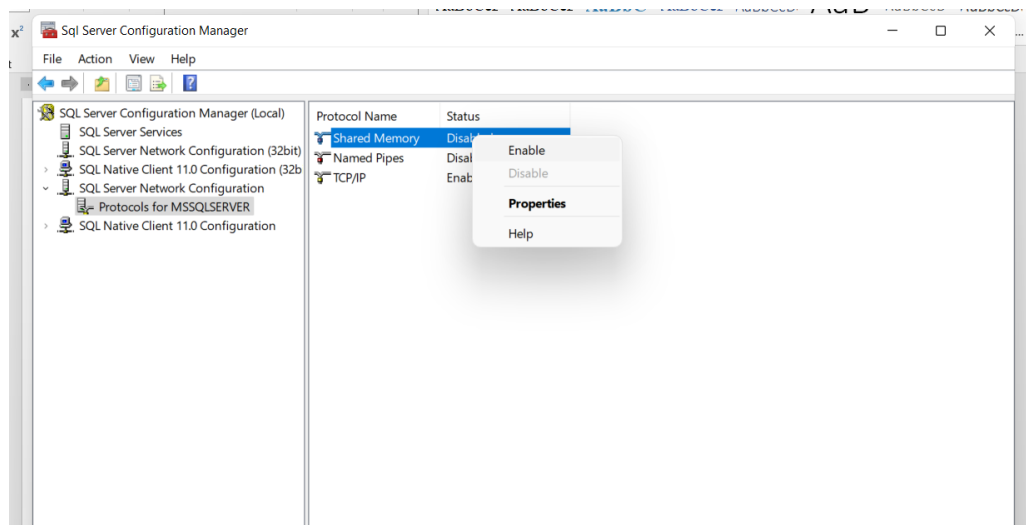
*Note: Do the same for SQL Server Browser, and make sure it's start mode is **automatic**.*



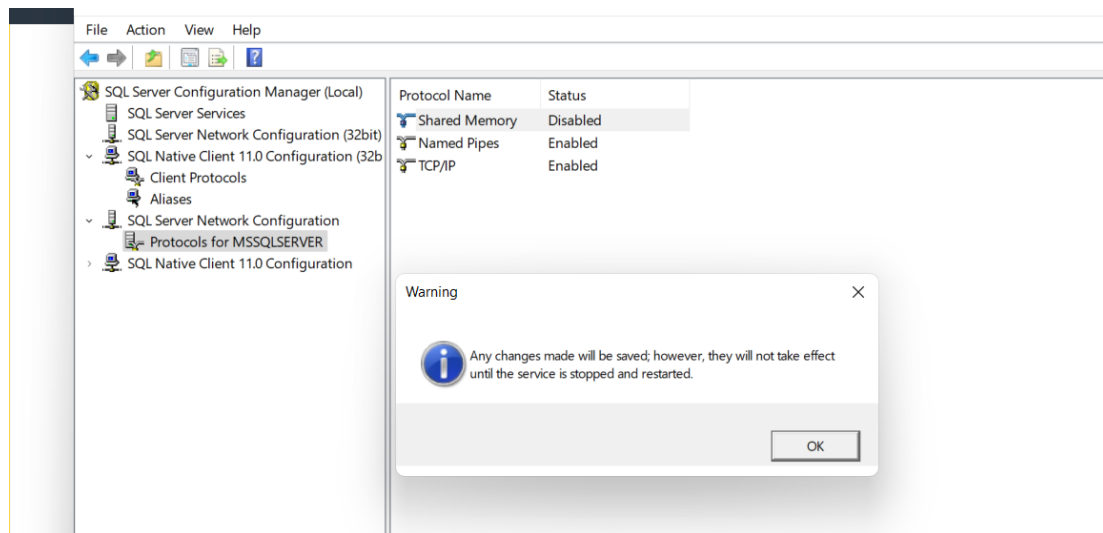


#### Step 4.

Click on that small arrow by the side of SQL Server Network Configuration and navigate to Protocols for MSSQLSERVER and click. Right click on Shared Memory under status and click Enable, Right click on Named Pipes also and click Enable and also TCP/IP.



*Note: A Warning dialog box will appear, click OK button and close the configuration button. You may be required to restart the computer, then restart.*

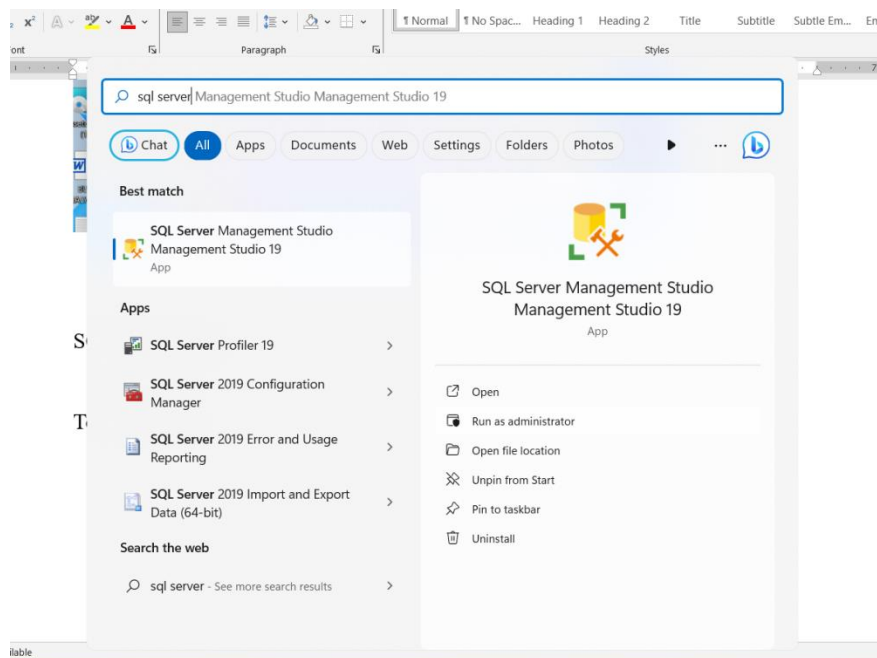


## How to change the Authentication Mode to Mixed Mode in SQL Server 2019

Changing the Authentication Mode to **Mixed Mode** (*SQL Server authentication and Windows authentication*)

### Step 1.

Tap the keyboard's window button, type SQL server management studio, and click to open.

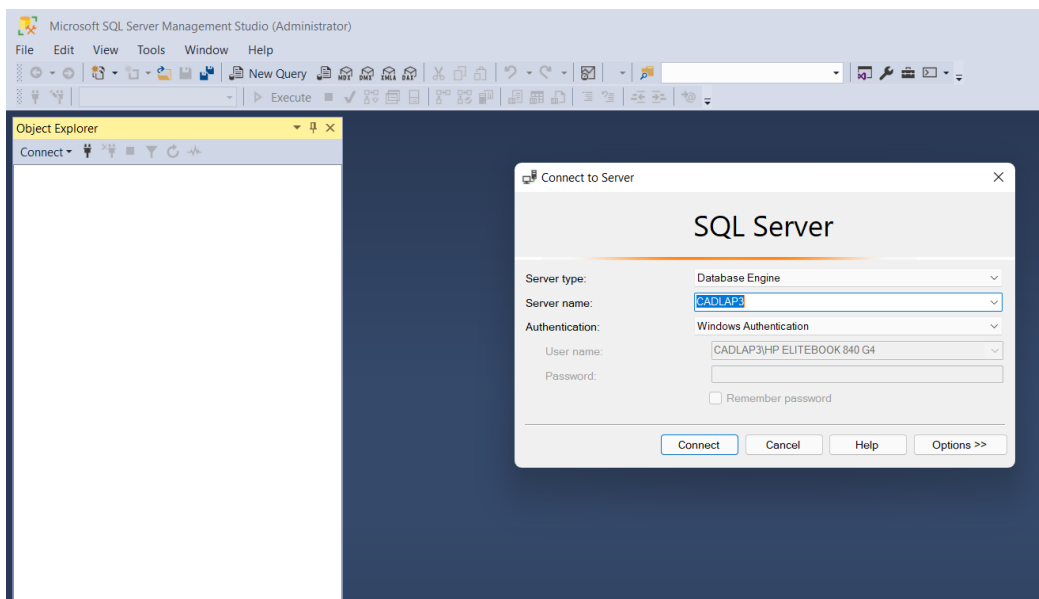


*Note: If your computer requests for “User Account Control” authentication, click Yes*



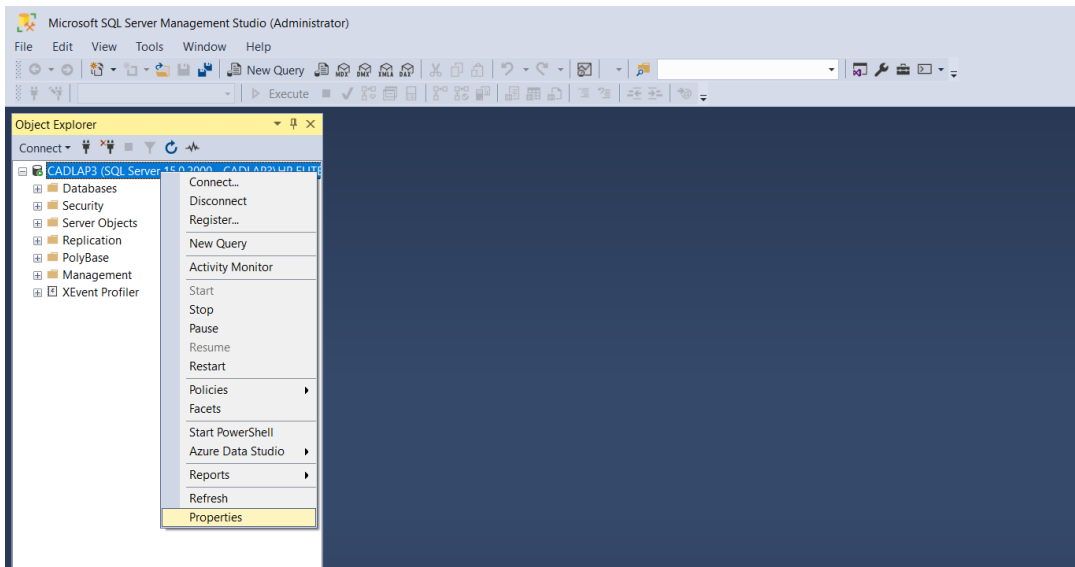
### Step 2.

Click the connect button. *Note: Make sure you select the appropriate server's name*



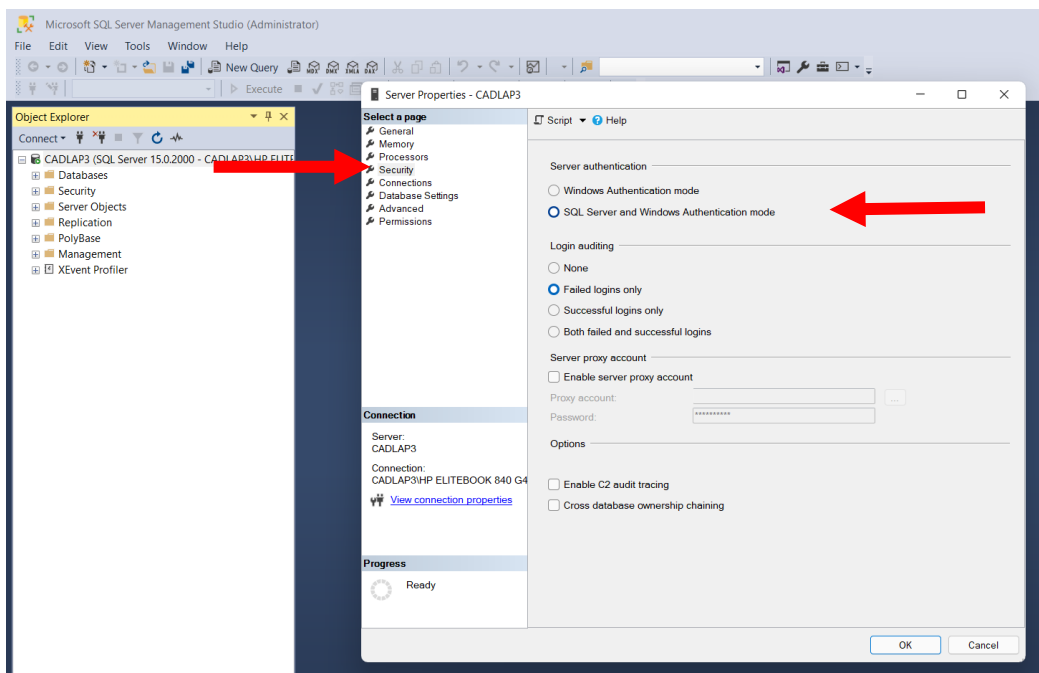
### Step 3.

Right-click on the server's name and select **Properties**



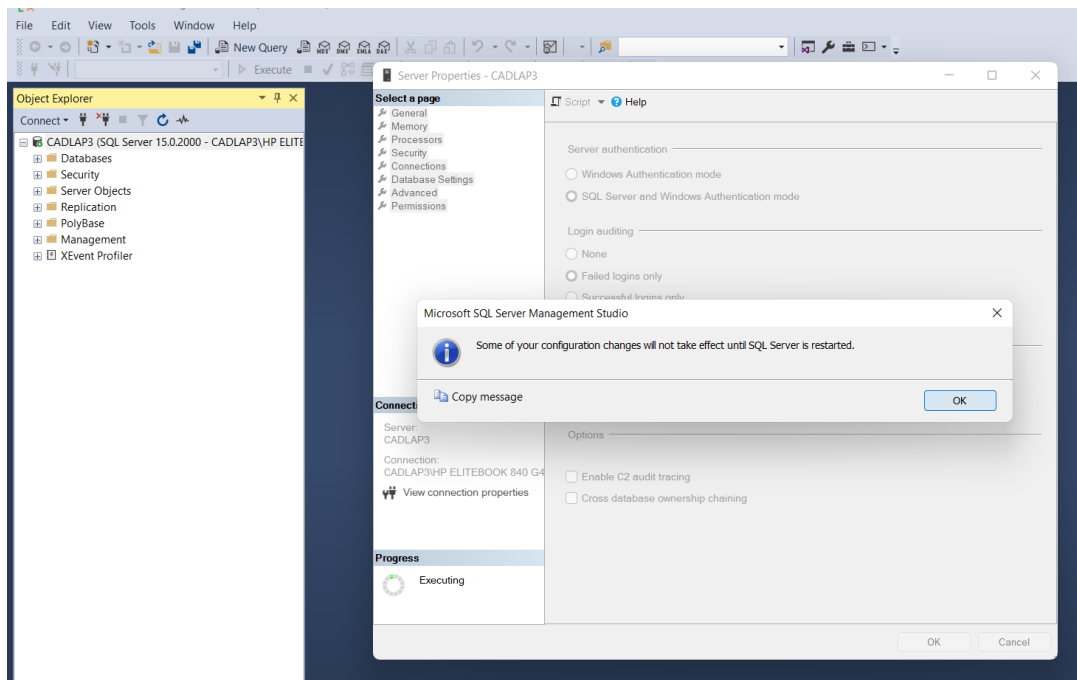
#### Step 4.

Click on Security and navigate to “SQL Server and Windows Authentication more”, and check it. And then click the OK button



#### Step 5.

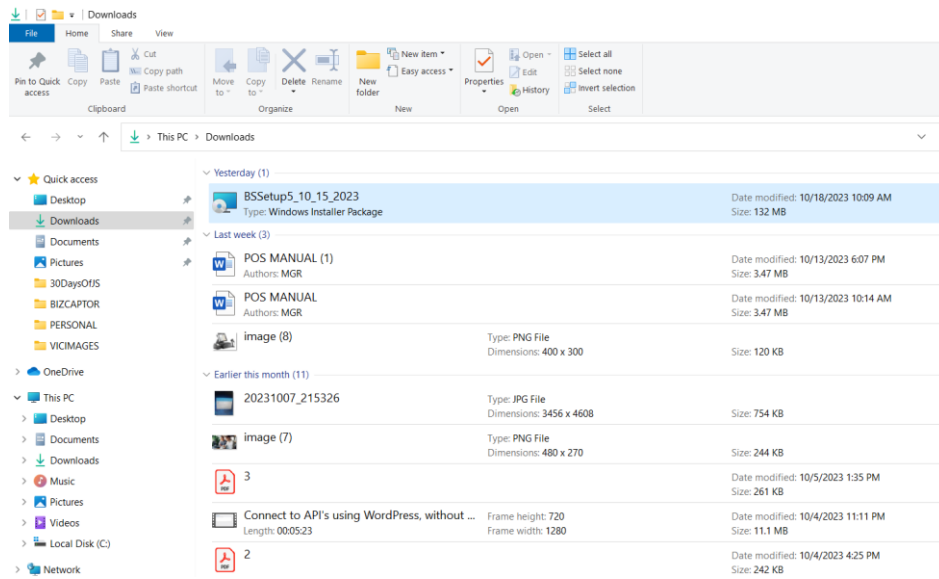
When a message pops up concerning the SQL server restarting, Click on OK.



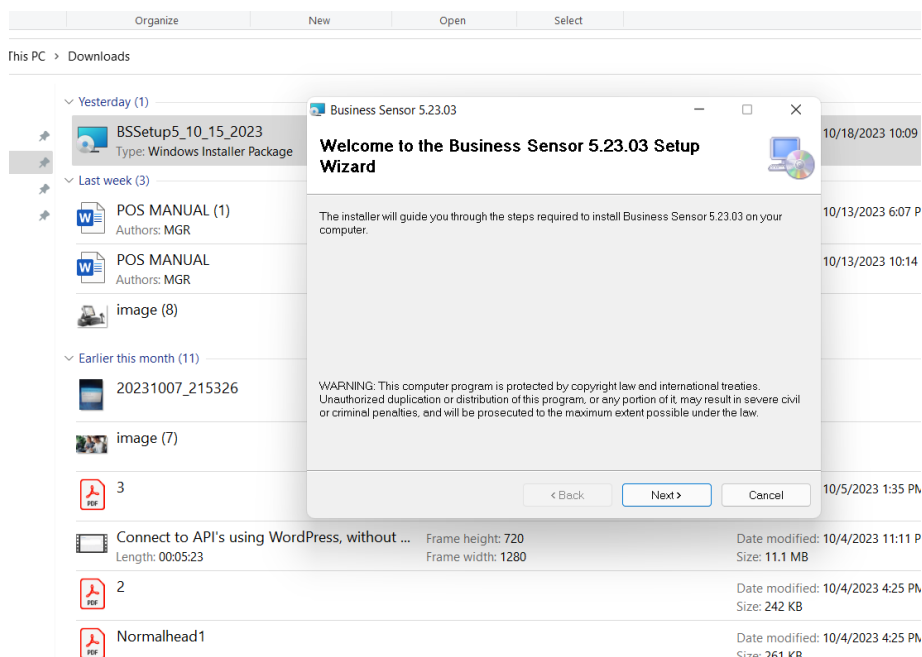
You have successfully changed to the mixed mode.

## Steps for installing Business Sensor Distribution Management Software

### Step 1: Double-click on the Business Sensor setup file(BSSetup) for installation

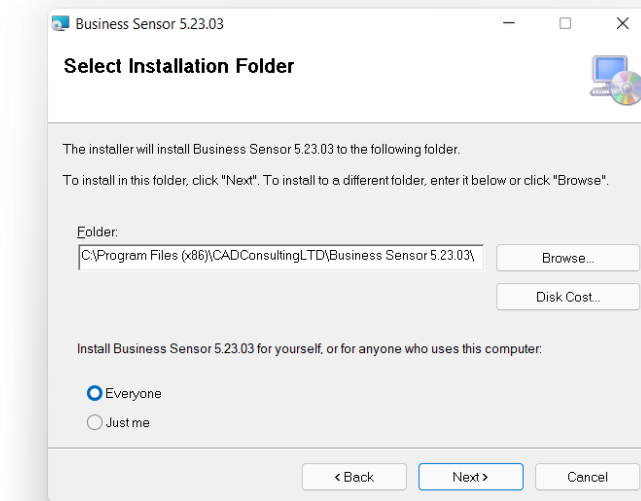


### Step 2: Click on the Next button to start the installation

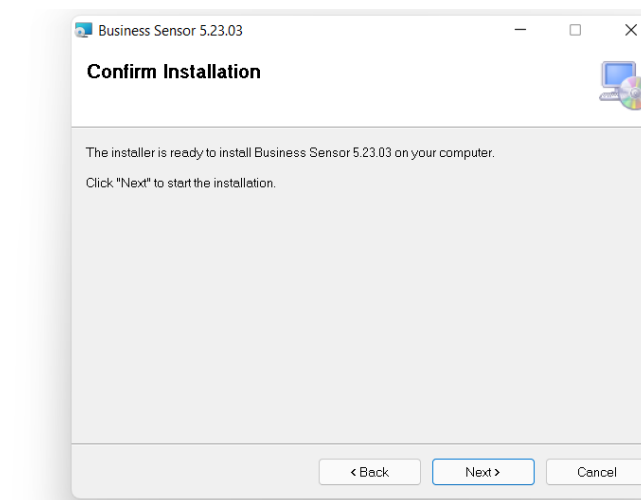


### Step 3: Check “Everyone” and click the Next button to proceed or the Back button if you have any corrections.

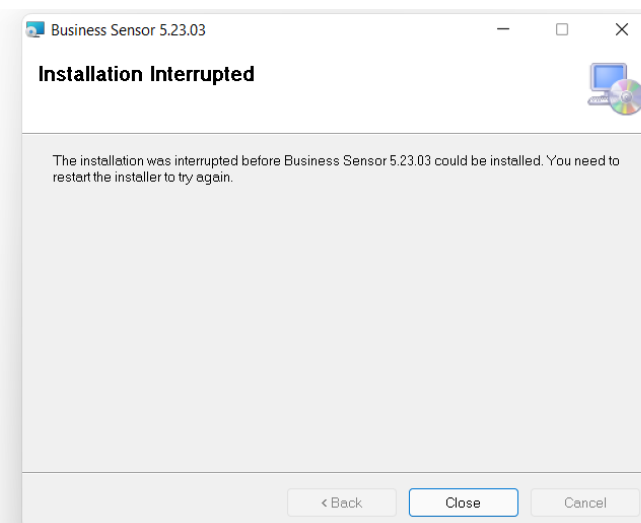




**Step 4:** On the Confirm installation page, click on the **Next** button to start the installation.



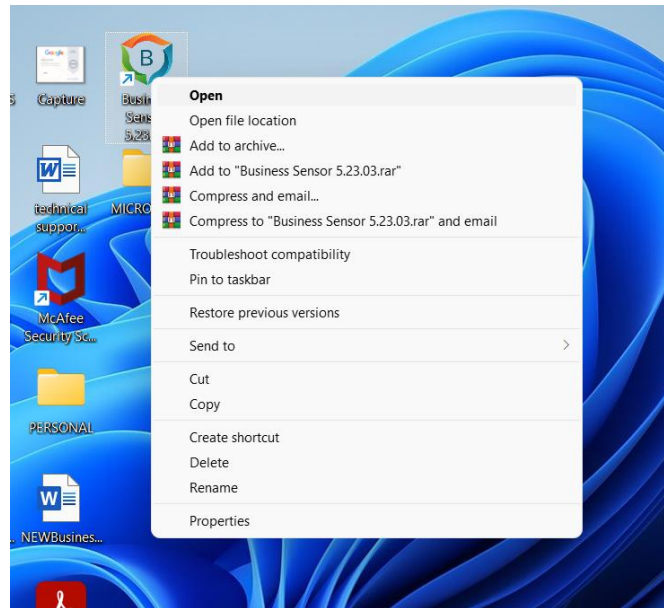
**Step 5:** After the installation, click the **“Close”** button to exit the installation page.



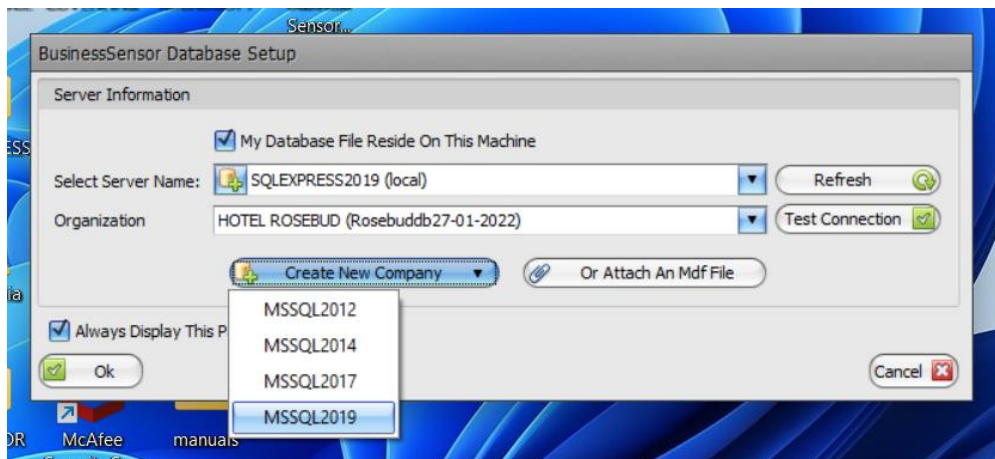
## How to license Business Sensor Point of Sales

Access our video tutorial on how to obtain a Business Sensor ERP Point of Sales license [here](#).

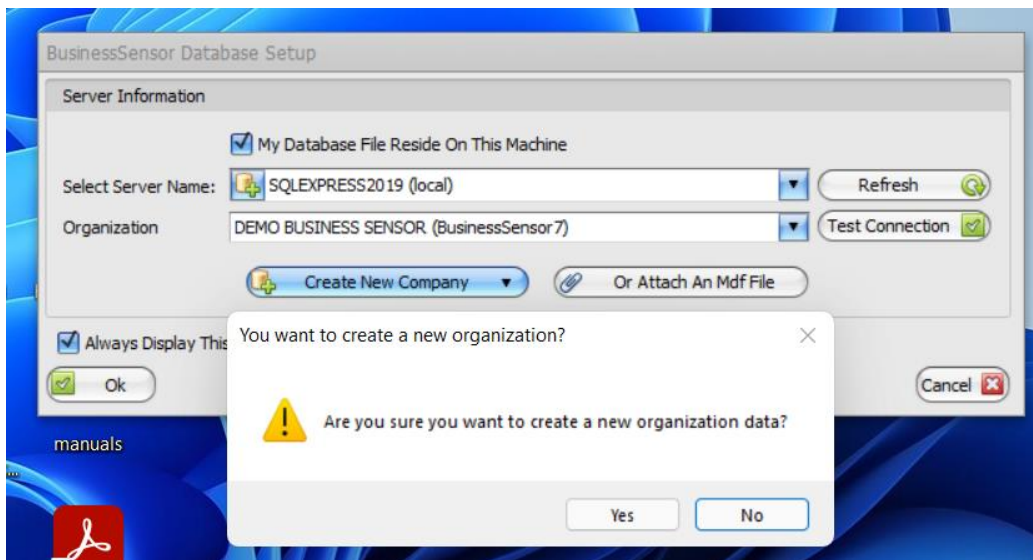
**Step 1:** Launch the Business Sensor you installed. And if a message (User Account Control) pops up, please Click Yes.



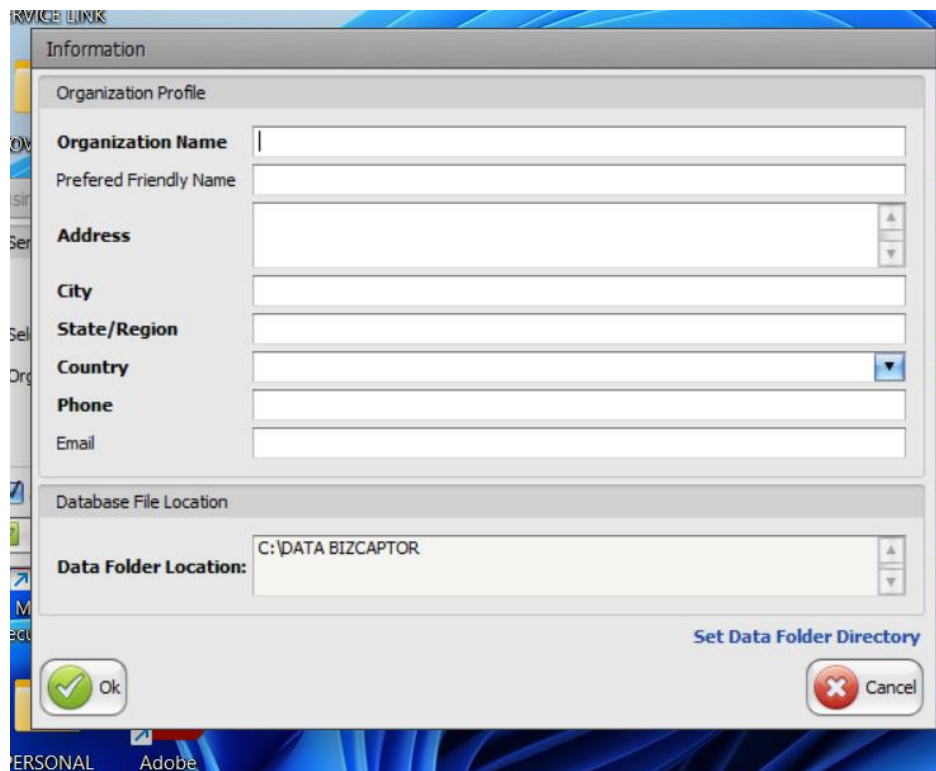
**Step 2:** The Business Sensor Database setup dialog page pops up, then, select the Server Name from the list (i.e., the name you supplied when you were installing SQL Server). Select the “Create New Company” and select the desired instance.



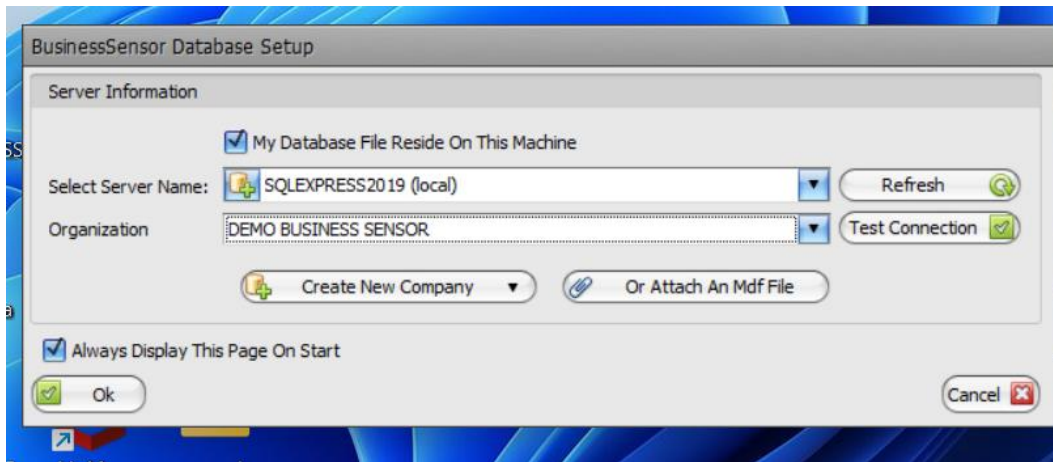
**Step 3:** A dialog box appears asking about your assurance, just click on the “Yes” button to continue.



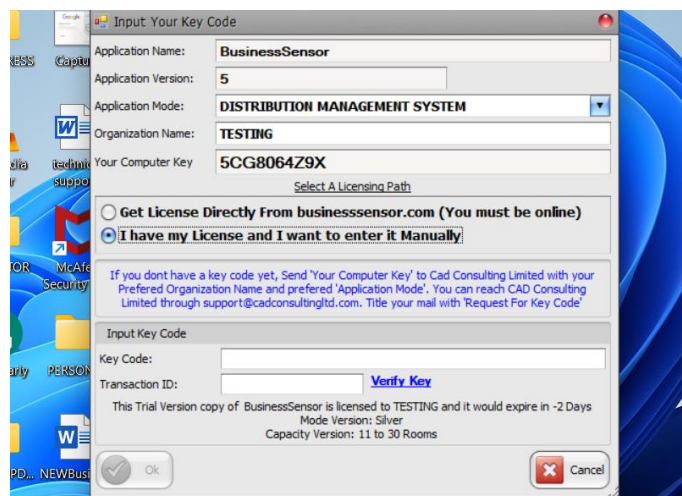
**Step 4:** Fill the organization information correctly. Select the location for your database from “Select Data Folder Directory” and Click on the OK button to continue.



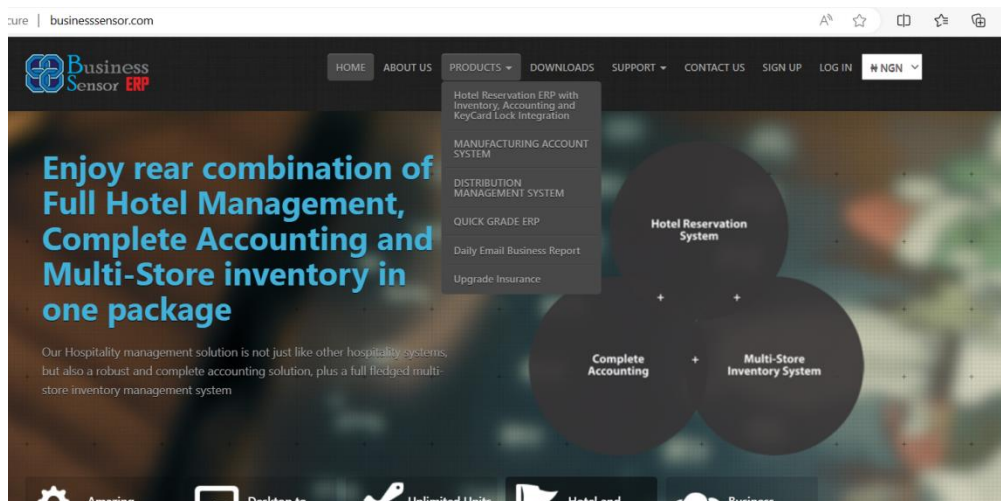
**Step 5:** The organization’s name will be displayed in the “Organization” field, then, click on the OK button to start your Business Sensor software.



**Step 6:** The next step is the licensing process. Please obtain the computer key and log in to our website [here](#).



Next, navigate to the 'Products' link and click it. This will display a list of all available products. Select the product for which you wish to obtain a license.



**Step 7:** To obtain a license for your desired product, choose the type by clicking on 'Buy' or 'Free Trial,' and then proceed with the registration.

businesssensor.com/Product/ProductHome/2

Plan	Standard	Silver	Gold
1-15 Rooms	₦378,180 <sup>12</sup>	₦760,180 <sup>24</sup>	---
16-30 Rooms	₦569,180 <sup>18</sup>	₦951,180 <sup>30</sup>	₦1,722,820 <sup>54</sup>
31 - 50 Rooms	₦760,180 <sup>24</sup>	₦1,142,180 <sup>36</sup>	₦1,911,528 <sup>60</sup>
51 - 75 Rooms	₦951,180 <sup>30</sup>	₦1,333,180 <sup>42</sup>	₦2,104,820 <sup>66</sup>
76 - 100 Rooms	₦1,142,180 <sup>36</sup>	₦1,524,180 <sup>48</sup>	₦2,295,820 <sup>72</sup>
101 - 200 Rooms	₦2,670,180 <sup>84</sup>	₦2,670,180 <sup>84</sup>	₦2,677,820 <sup>84</sup>
201 - 300 Rooms	₦3,052,180 <sup>96</sup>	₦3,052,180 <sup>96</sup>	₦3,059,820 <sup>96</sup>
301 - 400 Rooms	₦3,434,181 <sup>08</sup>	₦3,434,181 <sup>08</sup>	₦3,441,821 <sup>08</sup>
401 - 500 Rooms	₦3,816,181 <sup>20</sup>	₦3,816,181 <sup>20</sup>	₦3,823,821 <sup>20</sup>
Unlimited Rooms	₦4,198,181 <sup>32</sup>	₦4,198,181 <sup>32</sup>	₦4,205,821 <sup>32</sup>

Buttons: Buy, Free Trial

**Step 8: Fill the information, and press **Signup****

Login or Signup

Login here if you have already signed up

Email

Password

The Password field is required.

Remember me?

[Forgot your password?](#)

Signup here as a new visitor

OrganizationName

Contact Person

Contact person's Phone

Email

*Note: Provide other information in the form below, then click on **Signup***

Email

Password

Confirm password

Organization/Contact Person's Detail

OrganizationName

Contact Person

Contact person's Designation

Contact person's Phone

Organization Address

City

State/Province

Country

The Country field is required.

Profile Picture

What is 4 PLUS 6

The Provide an Answer to the Puzzle field is required.

**Step 9: Supply the package information, like package version, and package capacity, and select the acquisition mode. Fill in other information and click **Proceed****

Obtain Distribution Systems ERP License

Account Name:

Email:

Application Name:

Application Version:

Product Module:

Package Version:

Package Capacity:

Acquisition Mode:

Quantity:

Rate:

Total Volume Discount:

Amount:

**Step 10:** Provide the PCKey you copied in step 6, enter the PCKey, supply the Device Name, and click the 'Generate' button. The free 45-day trial license key, along with the transaction ID, will be generated. Copy both the key and the transaction ID and then enter them in the opened Business Sensor software.

www.businesssensor.com says

Copied the text: PCKey: "5CG8064Z9X"  
 TransId: "23833"  
 KeyCode: "XWYZ - XNYM - SWSY - RMQW - QGWJ - KQJM - GKXN - LMGX"

Testing reg1/Device Licenses

**DISTRIBUTION MANAGEMENT SYSTEM: License Price, 30 users Trial License**

Product Module : DISTRIBUTION MANAGEMENT SYSTEM, Version 5  
 Package And Capacity : Version: License Price  
 Capacity:30 Users  
 License Detail : 45 Days Evaluation trial - Expires on 05/Dec/2023(44 day(s) left)  
 License Date : 21/Oct/2023  
 No. Of License Units : 1  
 Licenses Used Up : 1  
 License Type : 45 Days Evaluation trial  
 Installation Key : FXGR - TQRA - QJVV

Manage Licenses **1 devices used up**

PC Key	Device Name	TransId	License Code	Action
5CG8064Z9X	BusSenLap	23833	XWYZ - XNYM - SWSY - RMQW - QGWJ - KQJM - GKXN - LMGX	<input type="button" value="Copy"/> <input type="button" value="Generate"/>

Device name could be any name you choose to identify your device, eg 'Melborn server', or 'Ikeja Shop'

**DISTRIBUTION MANAGEMENT SYSTEM: License Price, 30 Users Trial License**

Product Module : DISTRIBUTION MANAGEMENT SYSTEM, Version 5  
 Package And Capacity : Version: License Price

[Account Home](#)

*This is how it will look like, click **Verify Key**, and then **Click OK**.*



**Input Your Key Code**

Application Name: **BusinessSensor**

Application Version: **5**

Application Mode: **DISTRIBUTION MANAGEMENT SYSTEM**

Organization Name: **TESTING**

Your Computer Key: **5CG8064Z9X**

[Select A Licensing Path](#)

**Get License Directly From businesssensor.com (You must be online)**

**I have my License and I want to enter it Manually**

If you dont have a key code yet, Send 'Your Computer Key' to Cad Consulting Limited with your Preferred Organization Name and preferred 'Application Mode'. You can reach CAD Consulting Limited through support@cadconsultingltd.com. Title your mail with 'Request For Key Code'

**Input Key Code**

Key Code: **NWYZ - XNYM - SWSY - RMQW - QGWJ - KQJM - GKXN - LMGX**

Transaction ID: **23833** [Verify Key](#)

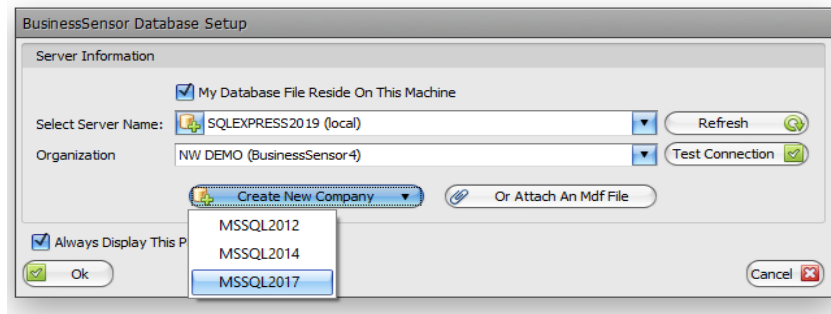
*Congratulations, you have successfully licensed your computer system*

## Set Up Your Company

### How to setup an organization

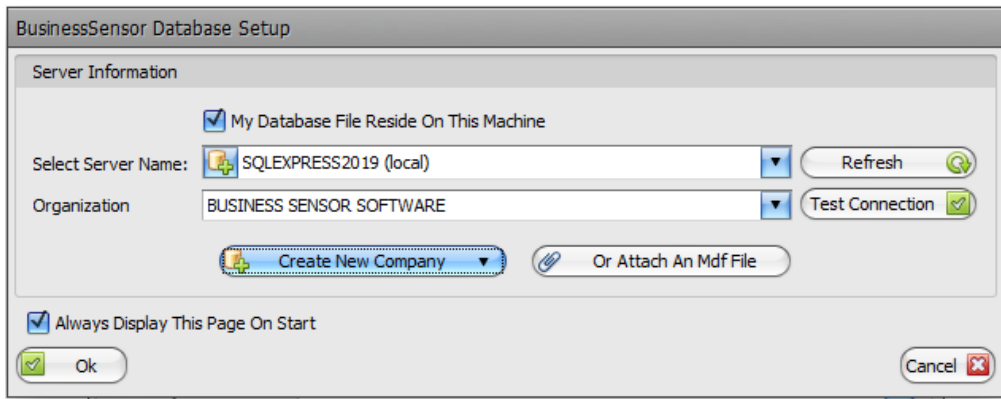
This is the process of setting up your business and the associated information within your business. To create a business in Business Sensor software, follow these steps:

**Step 1:** After completing the licensing process, you will be directed to a page where you should click on 'Create New Company

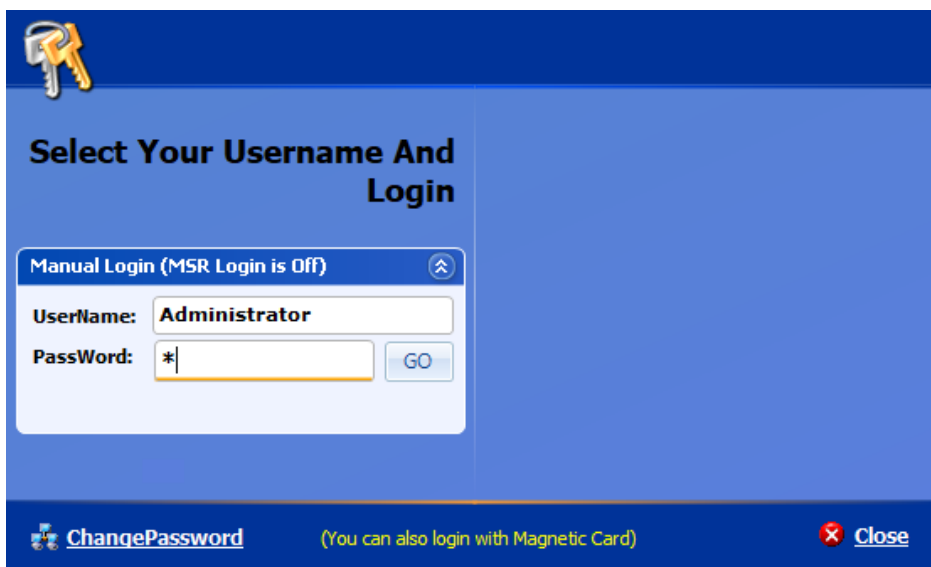


**Step 2:** Fill out the Organization profile as depicted below. Afterward, click 'Set Data Folder Directory' to specify the location for your data, and finally, click the 'OK' button.

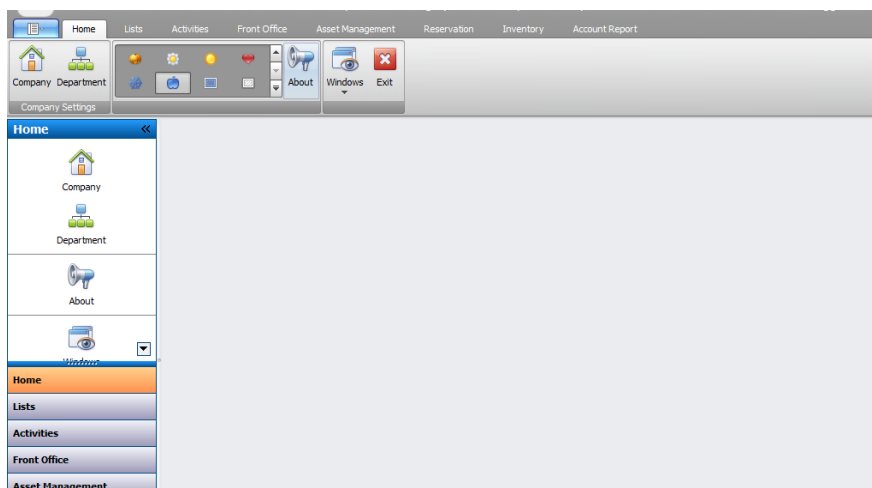
**Step 3:** Click Ok button to launch the software



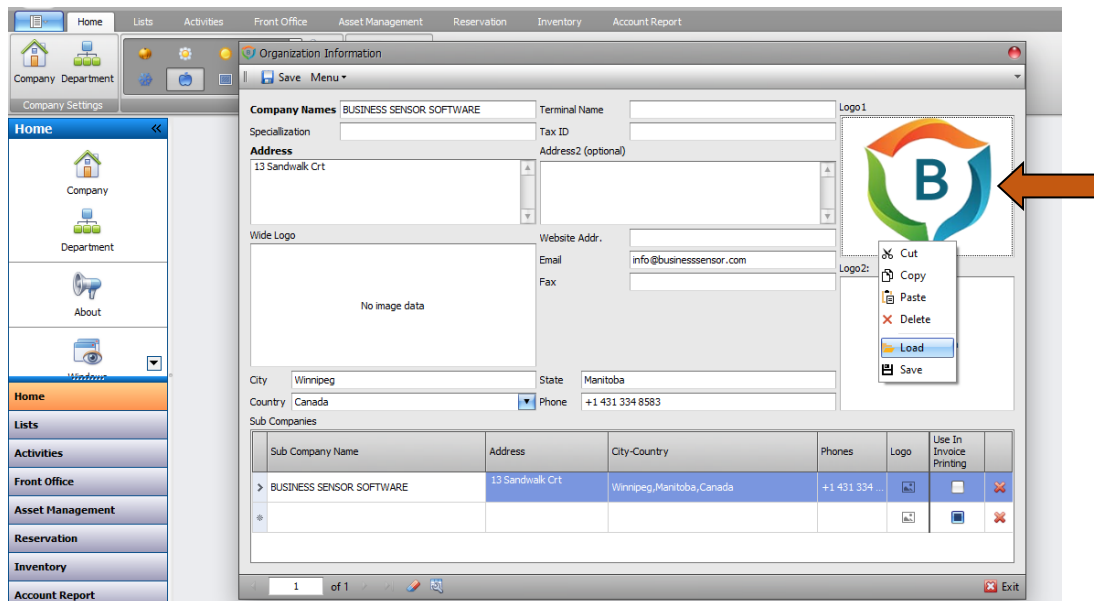
**Step 4:** Please type the “administrator” as the user Name, and type any password of your choice.



**Step 5:** This interface is the home page of the software; the next step is to upload our organization logo to the software and other information. Click on Company.



**Step 6:** Please fill in the required information. To upload your logo, **right-click** on the logo's space and select 'Load.' Then, browse your computer to locate your saved logo and click to upload it.



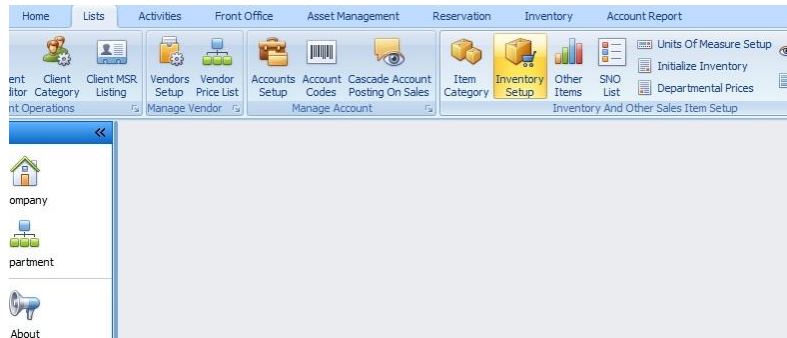
Finally click on Save button to save all the information provided.

## Set Up Your Inventory Item

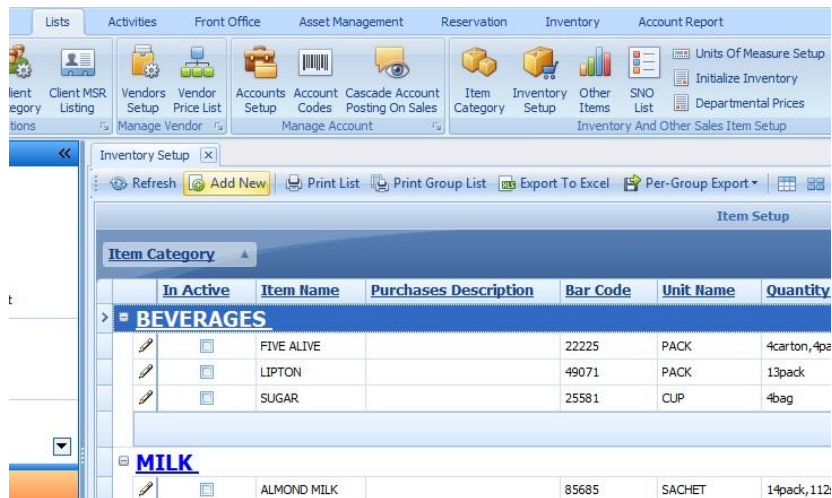
### How to setup Inventory item

Inventory setup is the process of modelling products in order to track quantity, sales, transfer, cost of goods sold, and consumption of every item in the inventory. To set up the inventory, follow these steps:

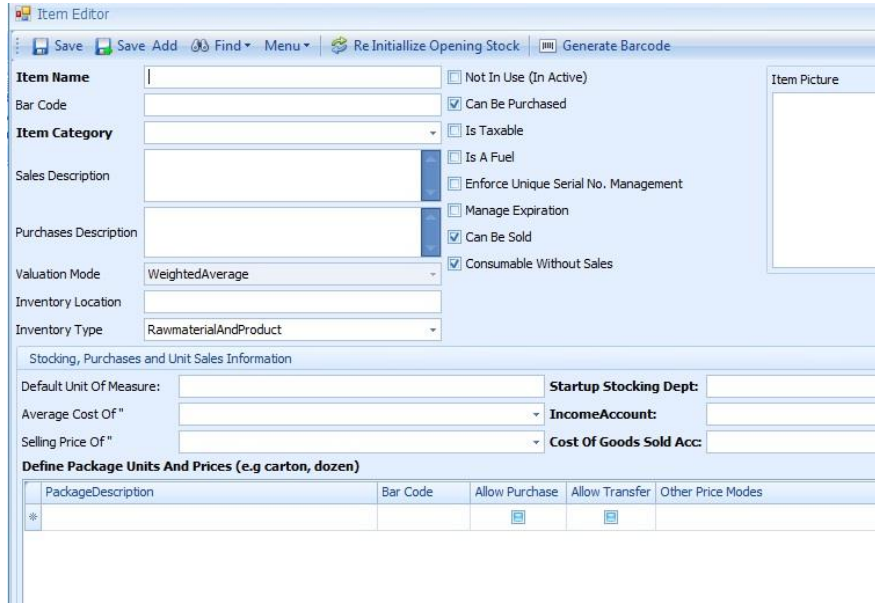
**Step 1:** Click on the “List” Menu and navigate to “Inventory setup” and click.



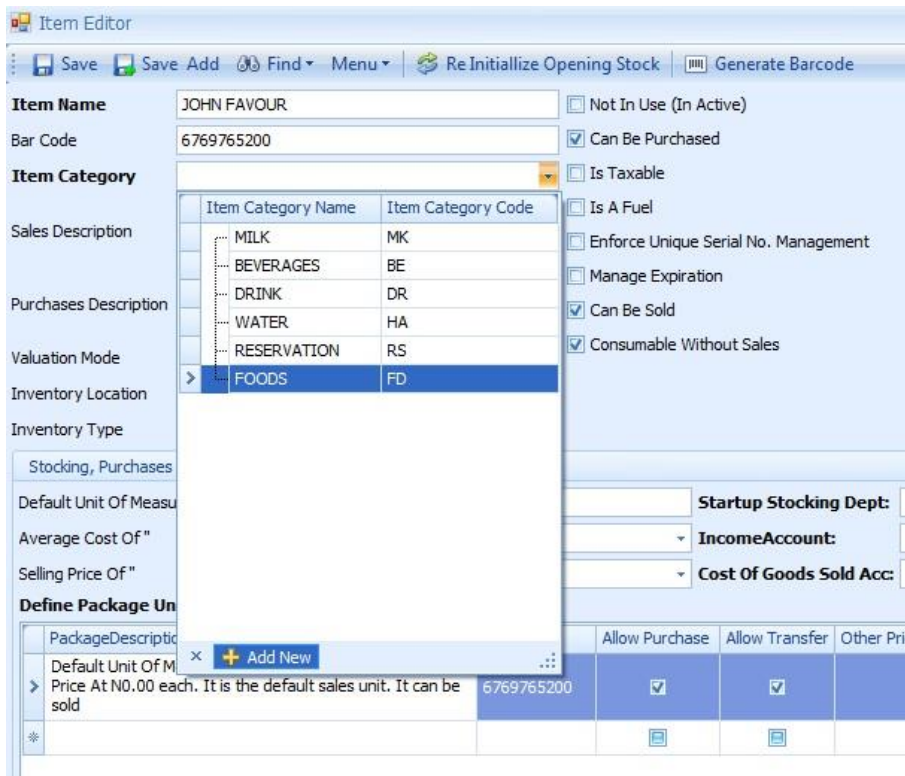
**Step 2:** Item listing will appear, and then click on the “Add New” button to add a new item to the list.



**Step 3:**Item Editor interface will be displayed;

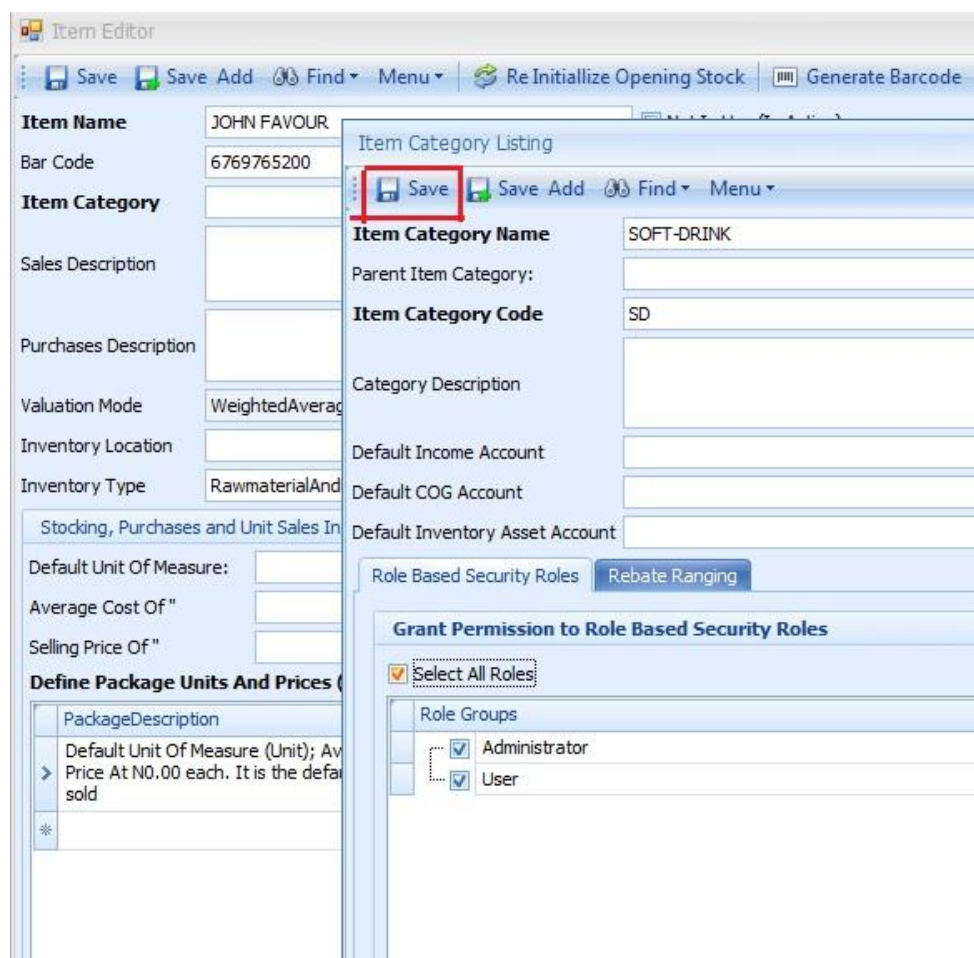


- Type in the item's name
- Read in the bar code if the item has a bar code. Note: *Refer to barcode management setup immediately after the setup item.*
- Select Item Category (if the category of that item is not among the list, you can add more categories by clicking Add New and adding the name of the category you want to create.





- i. Fill the Item Category Name
- ii. Enter the “Item Category Code” like FD for food
- iii. Select the default income account for the category (optional) if any
- iv. Select the default “Cost of Goods Account” for the category (optional) if any
- v. Select the default “Inventory Asset Account” for the item category (optional) if any
- vi. From the “Grant Permission to Role Based Security Roles” grid, check “Select AllRoles” if you want all the users to have access to this product
- vii. Click Save and Exit to close the item category form.



- d. Select the Inventory type
- e. Enter the “Default unit of Measure” i.e., bottle, sachet, card etc. Note: This is the lowest saleable unit of measure
- f. Select Start-up Stocking Dept
- g. Select Income Account
- h. Select Cost of Goods Sold Acc
- i. Type in the Average Cost Price

j. Type in the Selling Price.

The screenshot shows the 'Item Editor' window for 'COKA-COLA'. The 'Item Category' is 'SOFT-DRINK'. The 'Manage Expiration' checkbox is checked and highlighted with a red box. Below it, the 'Define Package Units And Prices' table is highlighted with a red box, showing a row for 'BTL' with a selling price of N40.00.

PackageDescription	Bar Code	Allow Purchase	Allow Transfer	Other Price Modes
Default Unit Of Measure (BTL); Avg. Cost: N0.00; Selling Price At N0.00 each. It is the default sales unit. It can be sold		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
*		<input type="checkbox"/>	<input type="checkbox"/>	

Note: if you want the software to manage the expiration date.

- Then check the box “Manage Expiration”, if not leave it unchecked
- If you want to define the package unit and price for this item e.g., carton, box, etc., then click on the empty second row of “Define Package Units and Prices” and fill it, else do not click.

The screenshot shows the 'Item Editor' window for 'COKA-COLA'. A dialog box titled 'Manage An Extra Unit Of Measure' is open, showing the configuration for a 'CARTON' unit. The 'Selling Price' is set to 1100.00. The 'Define Package Units And Prices' table is also visible, showing a row for '12 BOTTLE' with a selling price of N1100.00.

PackageDescription	Bar Code	Allow Purchase	Allow Transfer	Other Price Modes
12 'BOTTLE' makes One 'CARTON'; Selling Price At N1100.00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
*		<input type="checkbox"/>	<input type="checkbox"/>	

c. Click on the “Quantity on Hand” and type in the current quantity of the item

Allow Purchase	Allow Transfer	Other Price Modes
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	

th:	Quantity On Hand	42.
l: 0	As Of	28/04/2018
	Total Stock Value	1680

Exit

d. And finally click Save to save all the set-up you made and exit

Item Editor

Save Save Add Find Menu Re Initialize Opening Stock Generate Barcode

**Item Name** ZERO COKE  Not In Use (In Active) Item Picture

Bar Code   Can Be Purchased

**Item Category** SOFT-DRINK  Is Taxable

Sales Description   Is A Fuel

Purchases Description   Enforce Unique Serial No. Management

Valuation Mode WeightedAverage  Manage Expiration

Inventory Location   Can Be Sold

Inventory Type Product  Consumable Without Sales

**Stocking, Purchases and Unit Sales Information**

Default Unit Of Measure: BTL **Startup Stocking Dept:** FRONT OFFICE

Average Cost Of 'BTL' N100.00 **IncomeAccount:** Sales

Selling Price Of 'BTL' N200.00 **Cost Of Goods Sold Acc:** Goods Sold Cost Acc

**Define Package Units And Prices (e.g carton, dozen)**

PackageDescription	Bar Code	Allow Purchase	Allow Transfer	Other Price Modes
> Default Unit Of Measure (BTL); Avg. Cost: N100.00; Selling Price At N200.00 each. It is the default sales unit. It can be sold		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
* 12 'BTL' makes One 'CARTON'; Selling Price At N1,100.00 each. It can be sold		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	

**Inventory Asset** Inventory Asset Warranty in month:  Quantity On Hand 42.

Reorder Point 0 Re Stocking Level: 0 As Of 28/04/2018

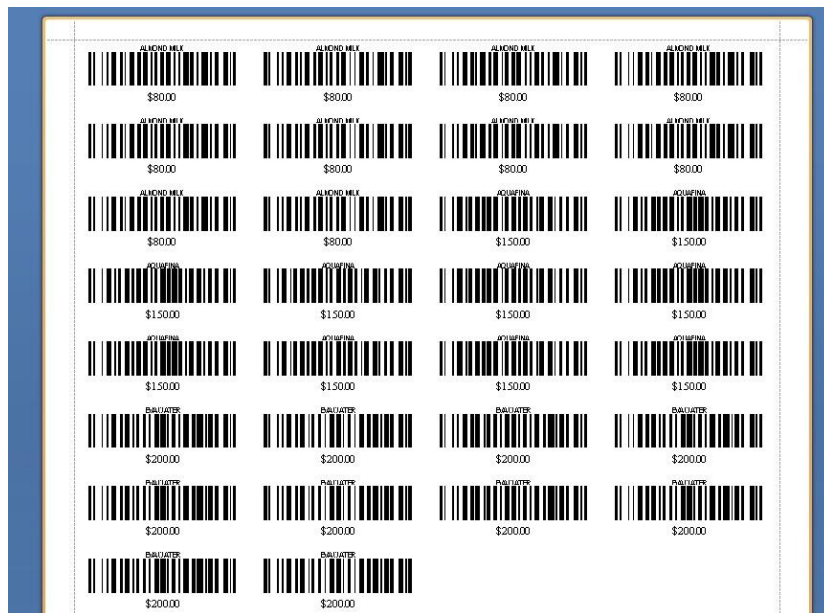
Last Managed By Administrator Total Stock Value 4200

**Note:** You can click Save Add to add more items continually without closing the item editor.

## Barcode Management

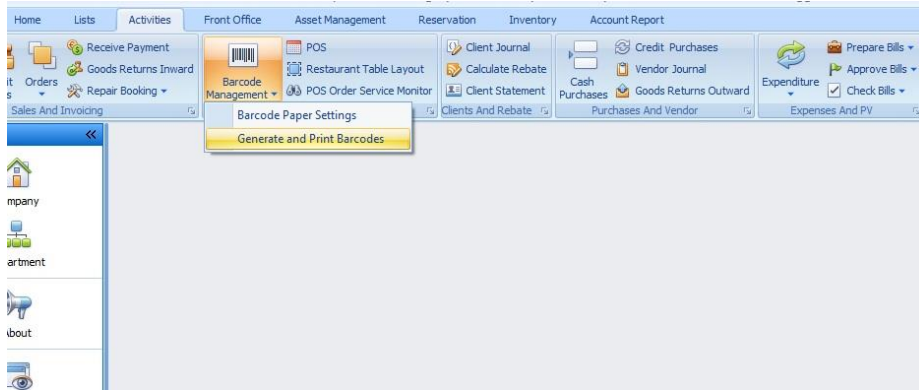
### Set up and manage your barcodes

A barcode is an optical machine-readable representation of data which shows the information about the object (product) to which it attaches to. It is encoded information about the product that carries it, attached by the manufacturer.

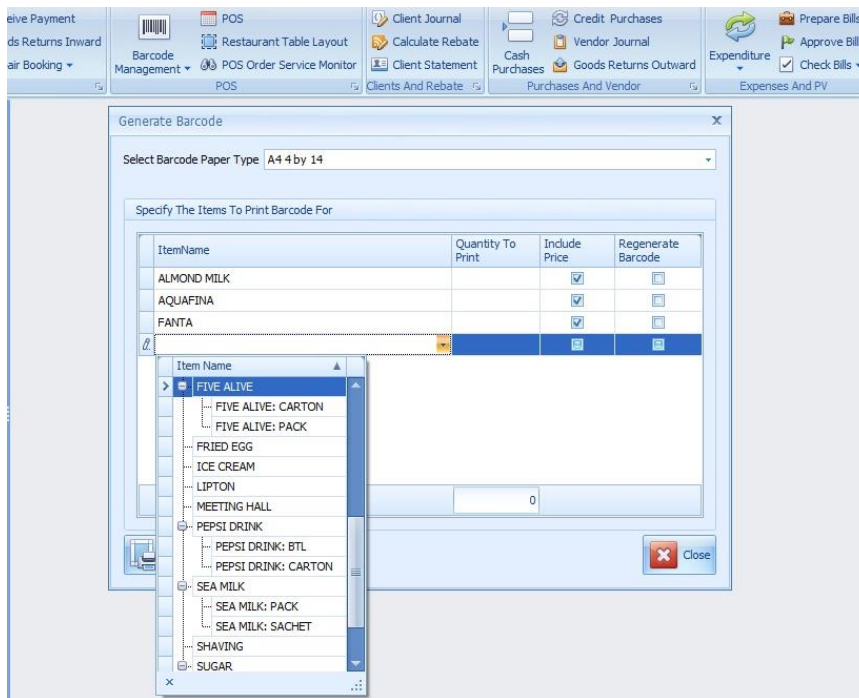


In addition, this interface enables you to generate customized barcodes. This is helpful in a situation where you have similar items with different barcodes or you deal with items that do not have barcodes and still want to implement barcode reading feature. With this interface you can comfortably generate barcode for your items and implement it. To generate barcode, these are the steps:

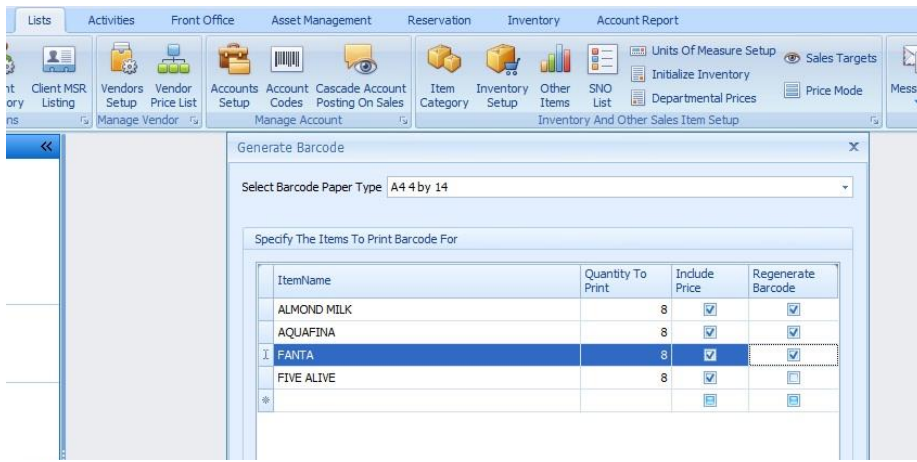
**Step 1.** Go to **Activities** menu and select **Generate and Print Barcodes**.



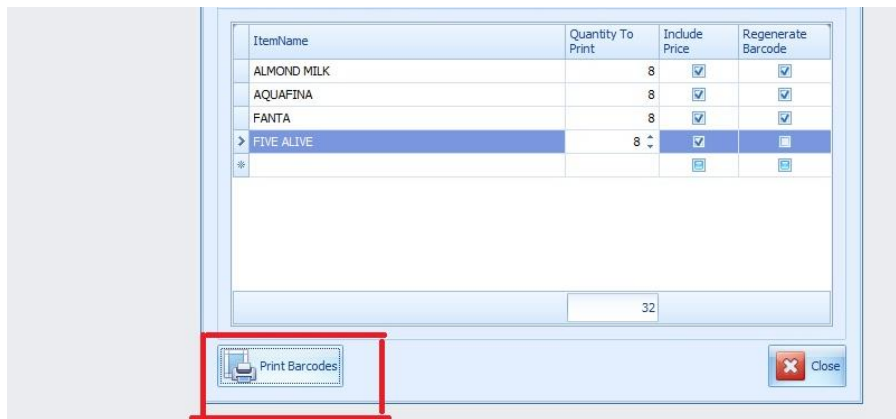
**Step 2.**Select **Barcode Paper Type**, in this case, I selected *A4 paper with 4by14*. Under **“Specify The Items To Print Barcode For”**. From Item Name selection, click on the empty row to select the items. Type the number of print-out you want in **“Quantity To Print”**. If you want the bar-code to have the price, then check **“Include Price”**.



**Step 3.**Check **Regenerate Barcode** if the item has no bar-code before or leave it unchecked if the item has bar-code already.

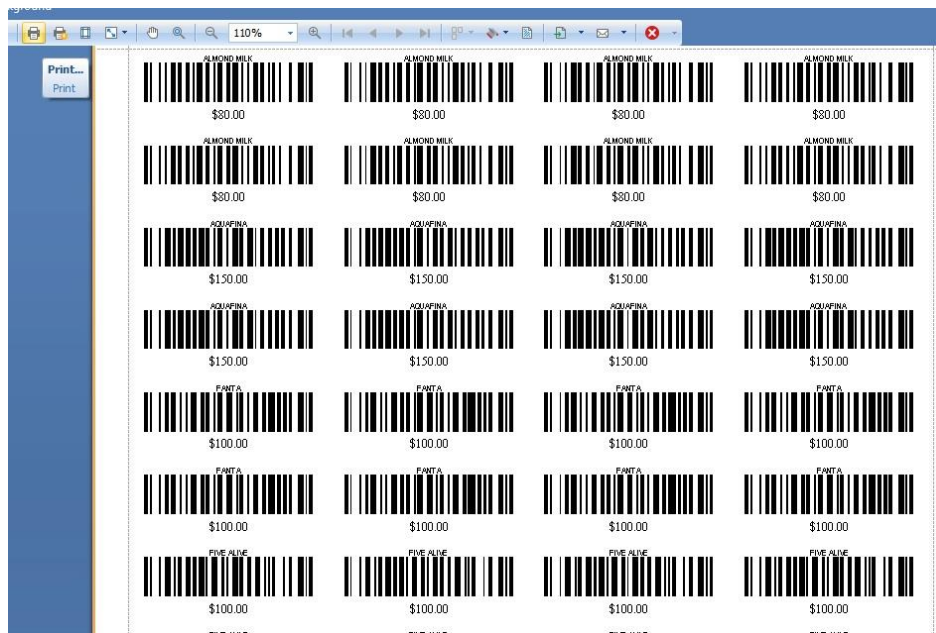


**Step 4.** Click on **Print Barcodes** button, print dialog box will open.



**Step 5.** The bar-code is going to look like this, then select the right printer and print.





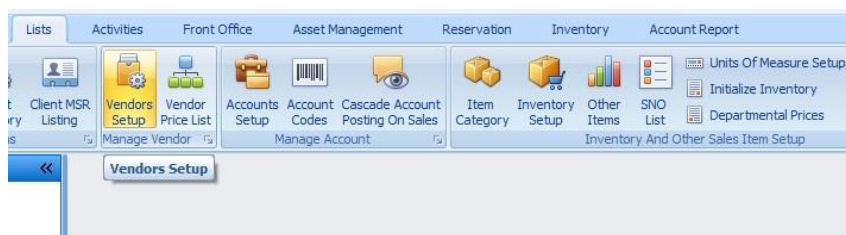
For a video tutorial on how to generate barcodes Click [here](#).

## Set Up Your Vendor Or Supplier

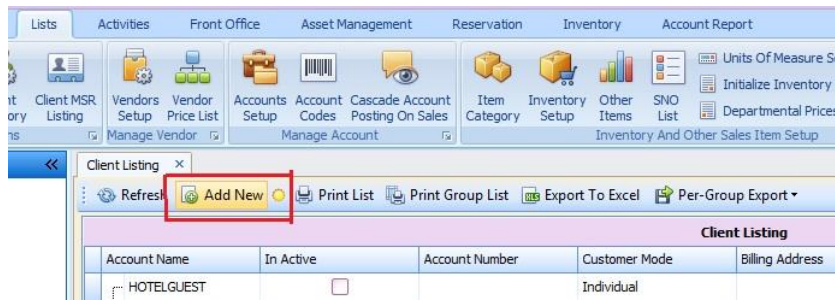
### Vendor or Supplier setup

The vendor setup interface is used to create and manage vendors/suppliers. Just like customers, the vendor could be an individual, a firm, or any organization that supplies materials, or products or your establishment. These are the steps to set up a vendor.

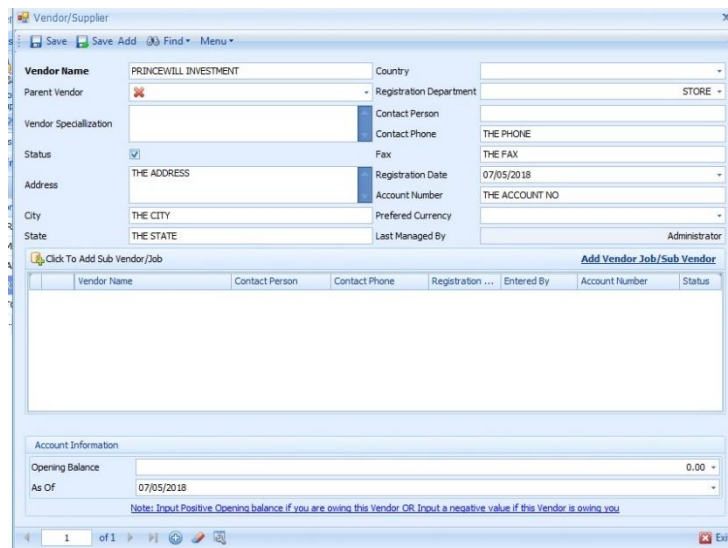
**Step 1.** Click on the **List** menu and select **'Vendor Setup'**



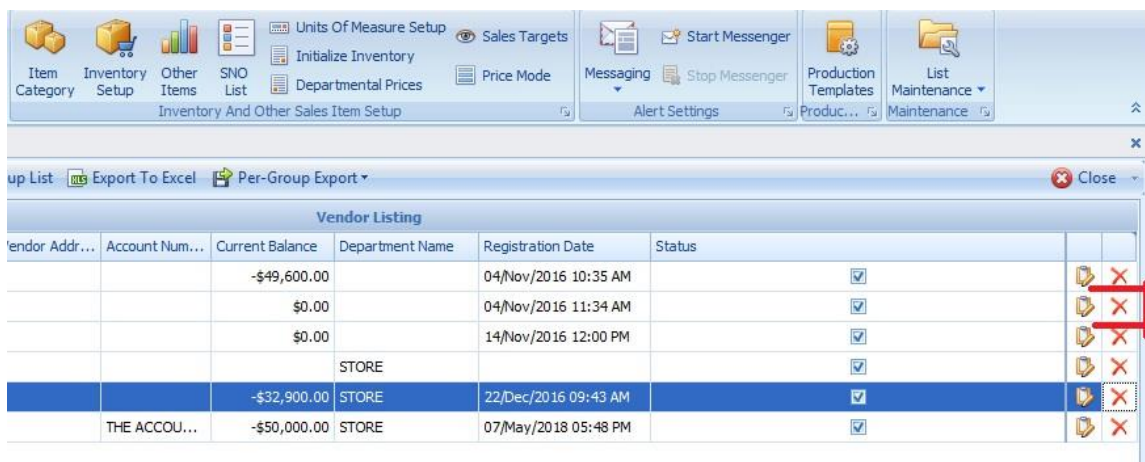
**Step 2.** When it opens click on **Add New** to open the vendor editor



**Step 3.** Type the Vendor's name or vendor's business name, type address, and other information. Note that you can enter the vendor's previous balance and the date if the vendor existed before the system setup, but if not, click Save to save your setup.



Note: To delete a vendor record, click on the delete button. Note this also, you can only delete the vendor if there are no transaction activities performed on the vendor.

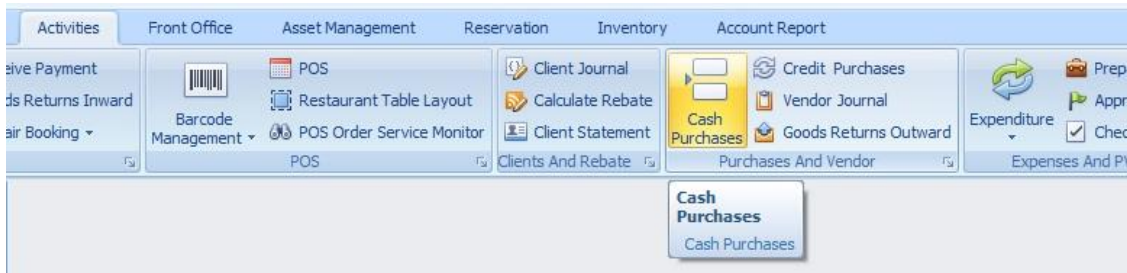


## Getting started with purchases

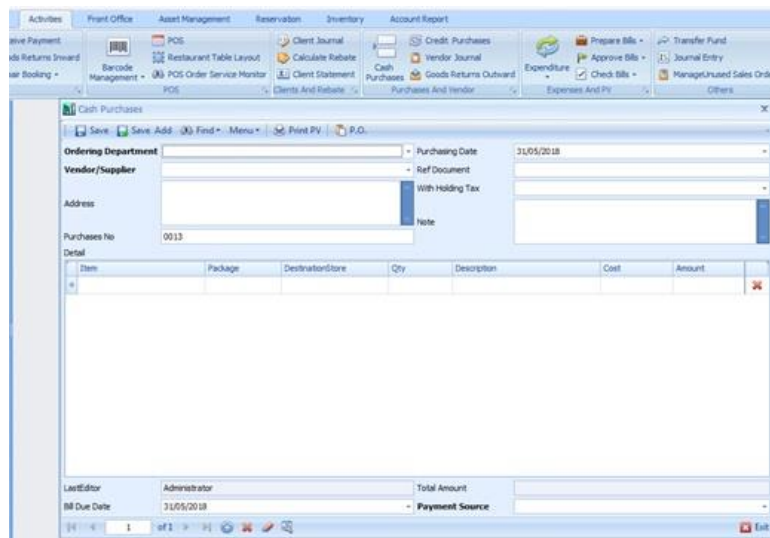
### How To Record Purchases

Purchasing is a common operation undertaken by both individuals and corporations to replenish their inventory. This can include credit purchases, where you acquire stock without an immediate payment, and cash purchases, which involve immediate payment. If you are acquiring a new item that isn't already in the system, you must go through the inventory setup process to formally register the item along with the purchased quantity and value. However, if the item is already in the system and you simply want to increase the quantity with a new purchase, here are the steps to follow:

**Step 1:** Navigate to the '**Activities**' menu and choose '**Cash Purchases**'.



**Step 2:** Once it opens, choose the **Ordering Department**, select the **Vendor or Supplier** from whom you made the purchase. If the vendor is not listed, you can click on 'Add New' and make sure to follow the Vendor setup procedure



**Step 3:** Choose the **item(s)** you purchased and select the **Payment Source**. Then, click on the 'Save' button. Once saved, you can check your inventory, and you will observe the changes. Please be aware that credit purchases and cash purchases share a similar interface, with the key difference being the absence of the payment source in credit purchases since they involve buying without immediate payment."

Activities Front Office Asset Management Reservation Inventory Account Report

Credit Purchases Prepare Bills Transfer Fund  
 Vendor Journal Approve Bills Journal Entry  
 Cash Purchases Goods Returns Outward Expenditure Check Bills Manage Unused Sales Orders  
 POS Restaurant Table Layout POS Order Service Monitor Client Statement Clients And Rebate Purchases And Vendor Expenses And PV Others

Cash Purchases

Save Save Add Find Menu Print PV P.O.  
 Ordering Department STORE Purchasing Date 31/05/2018  
 Vendor/Supplier PRINCEWILL INVESTMENT Ref Document  
 Address THE ADDRESS With Holding Tax  
 Purchases No 0013 Note

Item	Package	DestinationStore	Qty	Description	Cost	Amount
ALMOND MILK	SACHET	STORE	20		50	\$1,000.00
AQUAFINA	BOTTLE	STORE	15		100	\$1,500.00
EVA WATER	BOTTLE	STORE	10		150	\$1,500.00
FANTA	BTL	STORE	18		70	\$1,260.00
FIVE ALIVE	PACK	STORE	25			

LastEditor Administrator Total Amount  
 Bill Due Date 31/05/2018 Payment Source

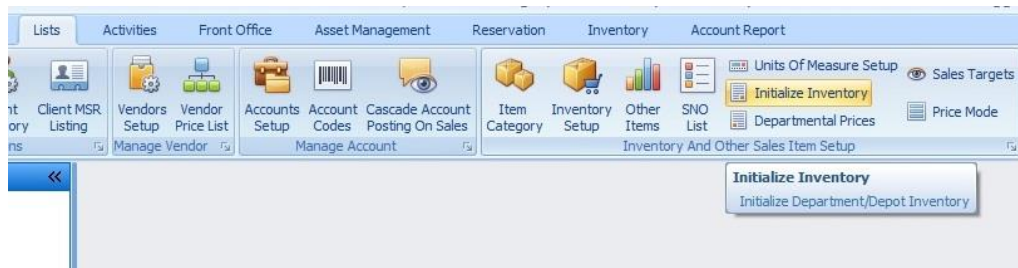
1 of 1

## Set up your Department/Depot Inventory

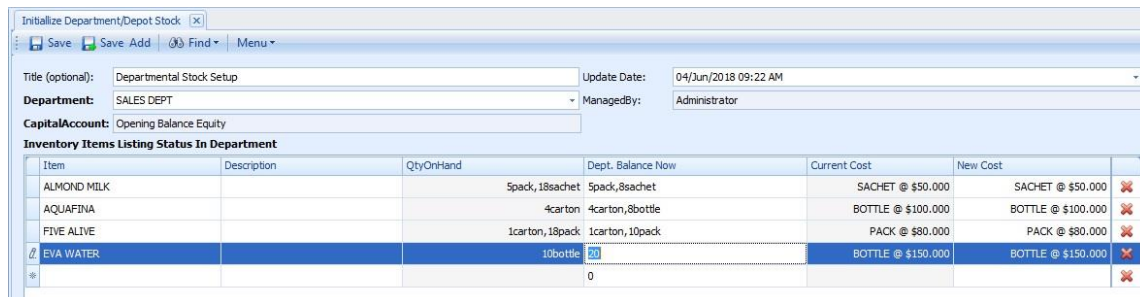
### Inventory Initialization

This interface enables you to input the initial quantity of your inventory items for various departments other than your main office. It is particularly useful for businesses with multiple departments or locations dealing with the same product line. Using this interface, you can efficiently manage the initial inventory for each department or depot and specify the quantity and stock value that each of them started with. To initialize this process, please follow these steps:

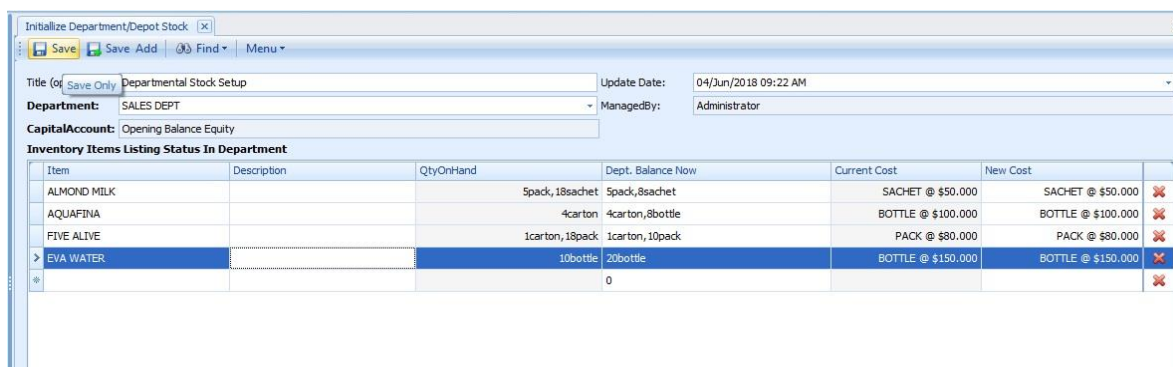
**Step 1:** Go to **List** menu and select **Initialize Inventory**.



**Step 2:** When it opens, select the **Department** you are initializing, and select the **item** you want to initialize from 'Inventory Item Listing Status In Department', input the **quantity** and if the **current cost** is different, input the **new cost**.



**Step 3:** Click on **Save** to save your entry as shown below. And do the same with the rest of the department/depot.



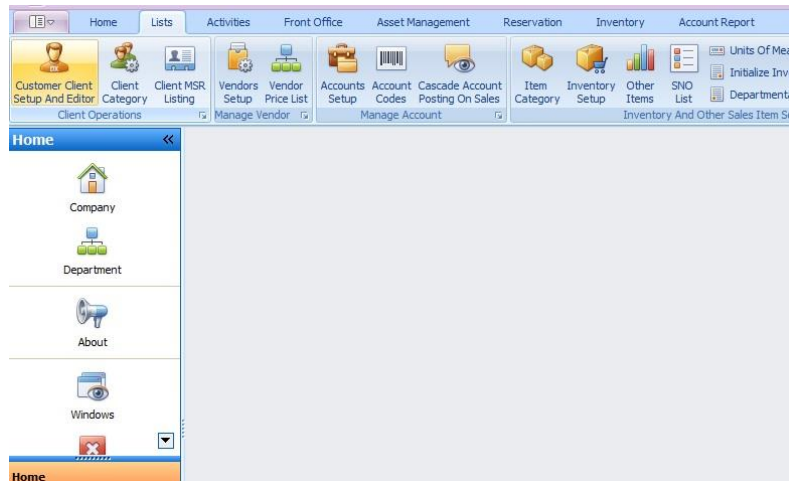


## Set Up Your Customer

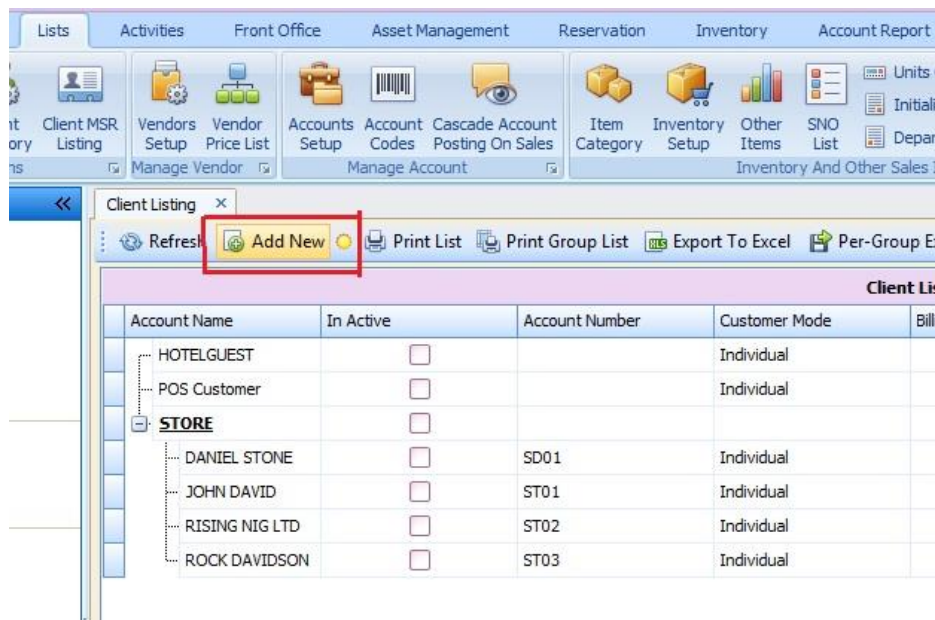
### How to set up customer

The customer setup interface helps to create and manage your customer list in a formatted order. This window also shows the current account status of customers and little information like the customer's account number, phone number, and address.

**Step 1:** Click on the **List** menu and select “**Customer Client Setup and Editor**”, the Client Listing interface will appear.

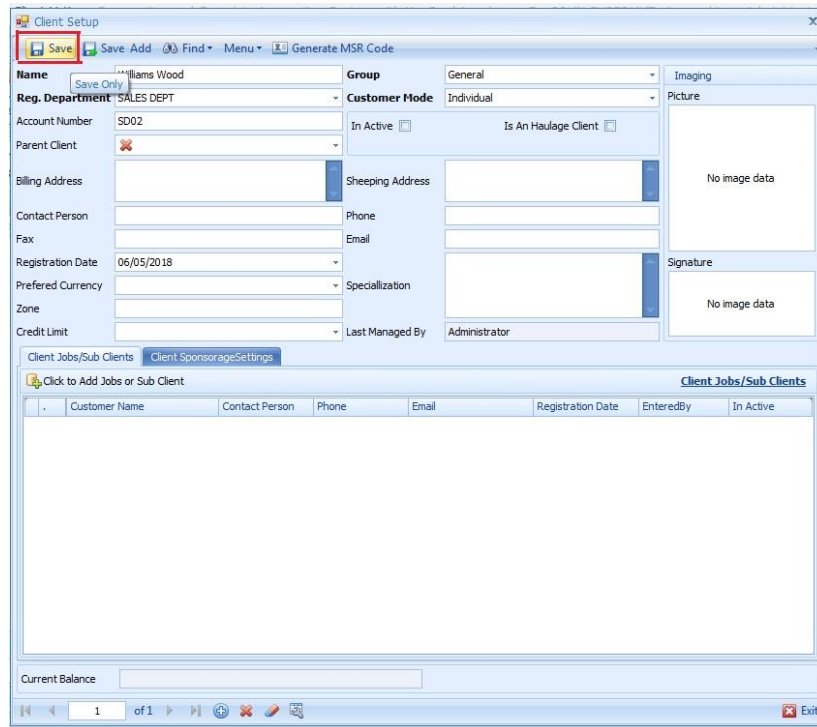


**Step 2:** Locate the Add New and click on it to open the client setup window.

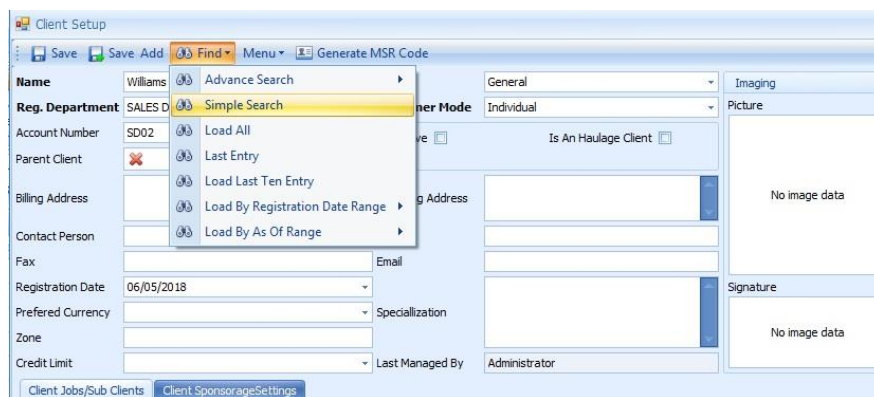


**Step 3:** The client setup interface form will appear, type your client's Name, and select the Reg. Department, by default, Group is selected, and Customer mode. Note. Under customer

mode, you can select whether the client is an individual, an employee, or an organization. Also, you can enter the customer’s previous balance and the date, if the customer existed before the setup. Then you can save the entries. If you want to add another client, then you can continue from the next step.



**Step 4:** You can search for already registered customers by clicking on **Find**. With this, you can search customer(s) easily by clicking on any of the options. For instance, you can search by clicking on ‘Simple Search’ and navigate to Name and click, if you want to search by name or other option that is convenient for you.



## Cash and Credit Sales

### Cash and credit sales invoice

These interfaces are utilized to document both cash and credit sales, generating invoices while also providing the option to create receipts for cash invoices. Cash sales denote transactions where customers make immediate payments. In contrast, credit sales are extended to reliable or trusted customers without requiring immediate payment.

#### Step 1:

Access the **activities menu** and choose between **cash or credit sales**.

The screenshot shows the 'Cash Invoice' form in a software application. The form is divided into several sections: 'Home' (with navigation icons), 'Selling From' (set to ADMINISTRATOR), 'Client Account' (with a dropdown menu), 'Invoice Number' (8302), 'Invoice Date' (12/12/2023), 'Sales Officer' (Administrator), and 'Invoice Detail' (a table with columns for Item, Package, Qty, Description, Rate, and Amount). The 'Client Account' dropdown is currently open, showing a list of clients with columns for Full Name, Mode, Current Balance, Phone, and Billing Address.

#### Step 2:

Select the department where you are selling from (**Selling From**). Choose the client's name from the "**Client Account**" drop-down if the client is listed. If the client isn't listed, click on "**Add New**" within the client account drop-down to include a new customer.

This screenshot shows the 'Cash Invoice' form with the 'Client Account' dropdown menu open. The dropdown menu displays a list of clients with columns for Full Name, Mode, Current Balance, Phone, and Billing Address. The client 'RAPHAEL ADMINZ' is selected. The 'Add New' button is highlighted in the dropdown menu. The form also shows the 'Total Bill' (NG.00), 'Amount Sponsored' (NG.00), and 'Expected Payment' (NG.00). The 'Payment Method' is set to 'Cash' and the 'Payment Account' is set to 'Payment Doc No'.

### Step 3:

Once it's open, input the **customer's name** and fill in all required details on the form. Afterward, click on **"Save"** to confirm the information.

The screenshot shows the 'Cash Invoice' form with the following details:

- Client Account:** IN-HOUSE USE
- Client Balance:** 0.00
- Invoice Date:** 12/12/2023
- Invoice Number:** 8302
- Source Of Stock:** ADMINISTRATOR
- Service Charge:** 0.00
- Discount:** 0.00
- Invoice Detail Grid:**

Item	Package	Qty	Description	Rate	Amount
STAR CENTRE LIGHT	LNLT	0		0.00	0.00
- Total Bill:** 0.00
- Expected Payment:** 0.00
- Payment Method:** Cash

### Step 4:

Select the item(s) to be sold from **Invoice Detail** grid and the quantity to be sold in **"Qty"** column.

This screenshot is identical to the one in Step 3, but the 'Invoice Detail' grid is highlighted with an orange border, indicating that the user is about to select an item and enter a quantity.

### Step 5:

In the case of Cash Sales, designate the **"Payment Method"** and **"Payment Account."**  
Note: However, for Credit Sales, the **"Payment Method"** and **"Payment Account"** options won't be visible since the purchase doesn't involve immediate payment.

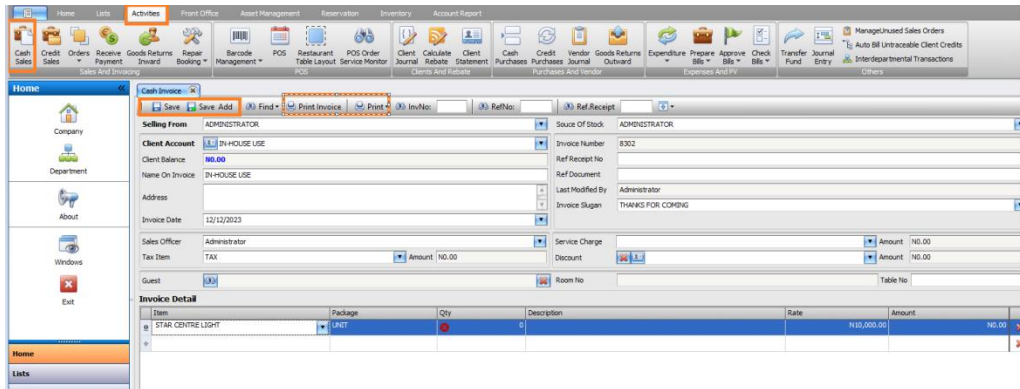
This screenshot shows the 'Cash Invoice' form with the 'Payment Method' and 'Payment Account' fields highlighted. The 'Payment Method' is set to 'Cash' and the 'Payment Account' is set to 'ADMINISTRATOR'.

### Step 6:

Click on the “Save” icon to save the transaction.

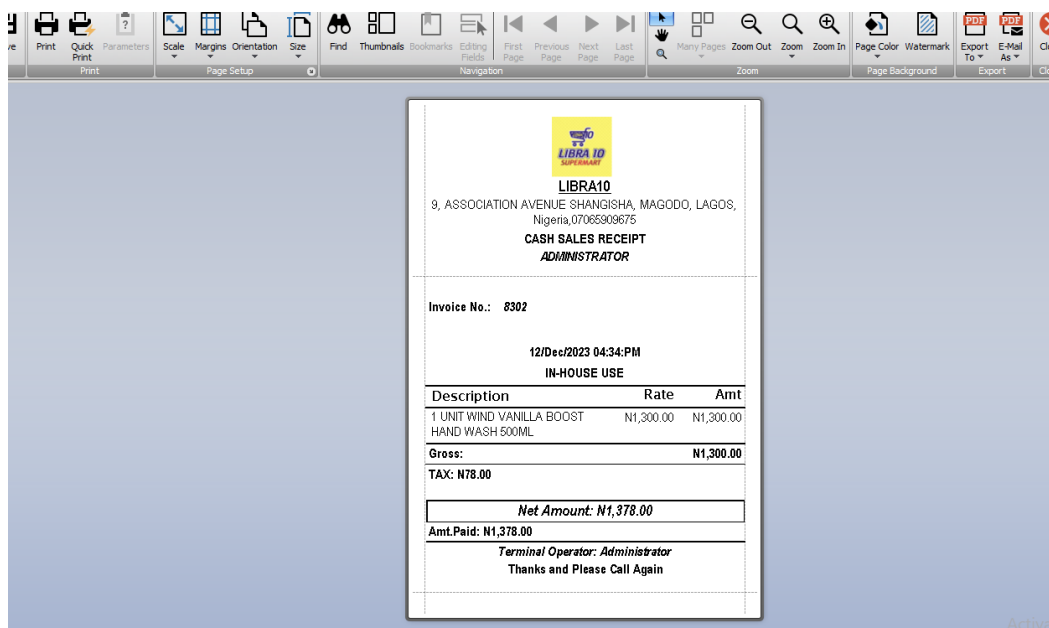
### Step 7:

Now, to print out the transaction invoice, click on “Print Invoice” or “Print” to explore other print options



### Step 8:

You can print the invoice by clicking on **Print Receipt**



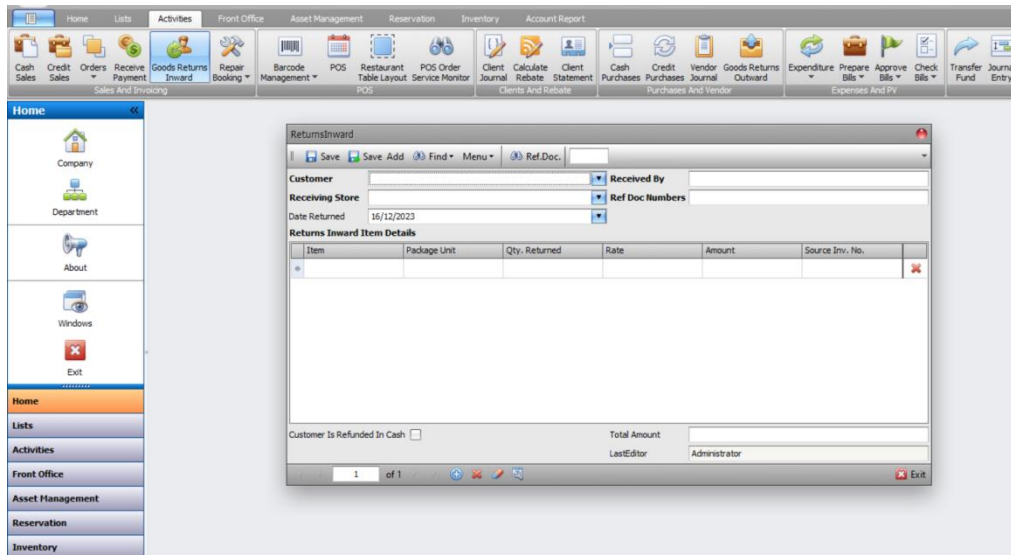
## Goods Return Inward and Outward

### Goods return Inward

This process involves customers bringing back purchased items to the store for an exchange or refund. Such situations may arise due to a change of mind or if the purchased goods are faulty, expired, or damaged.

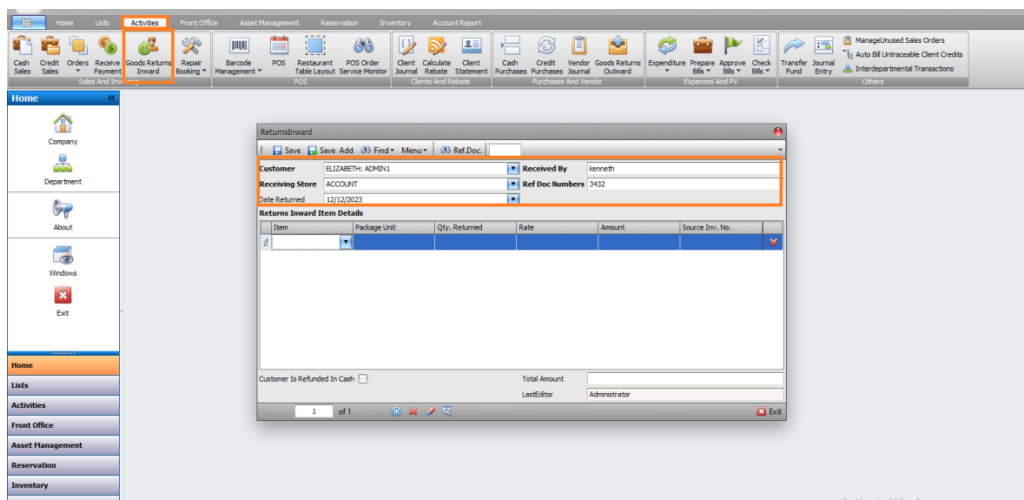
#### Step 1:

Access the **Activities menu** and choose "**Goods Returns Inwards**".



#### Step 2:

Choose the **Customer's name**, designate the **Receiving Store**, input the name of the **receiving officer**, and specify the **Reference Document Number**.



#### Step 3:

In the "**Returns Inward Item Details**" section, **pick the received Item**, the **Package Unit**, **Quantity Returned**, and input the **Source Invoice No.**

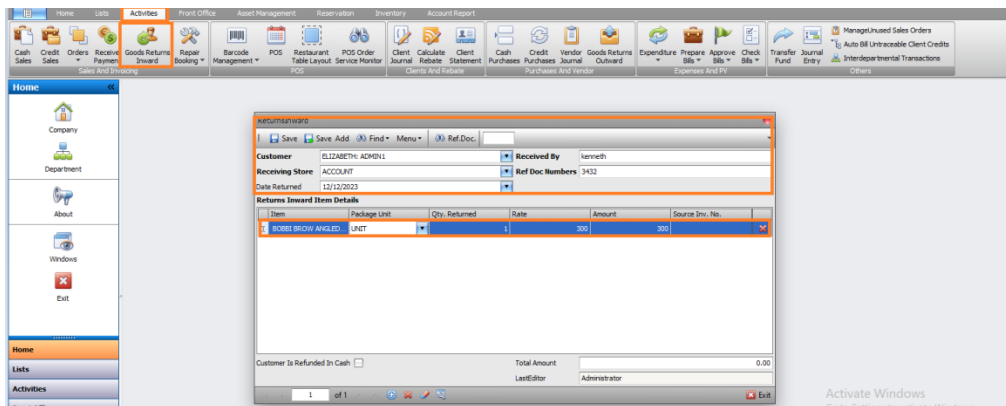


#### Step 4:

Mark the checkbox labeled **(Customer Is Refunded In Cash)** and choose the Refunding account.

#### Note:

In cases where the customer prefers to **exchange the product rather than a refund**, refrain from checking the **Customer Is Refunded In Cash**. Instead, the amount equivalent to the refunded products will be credited to their account for the new transaction.

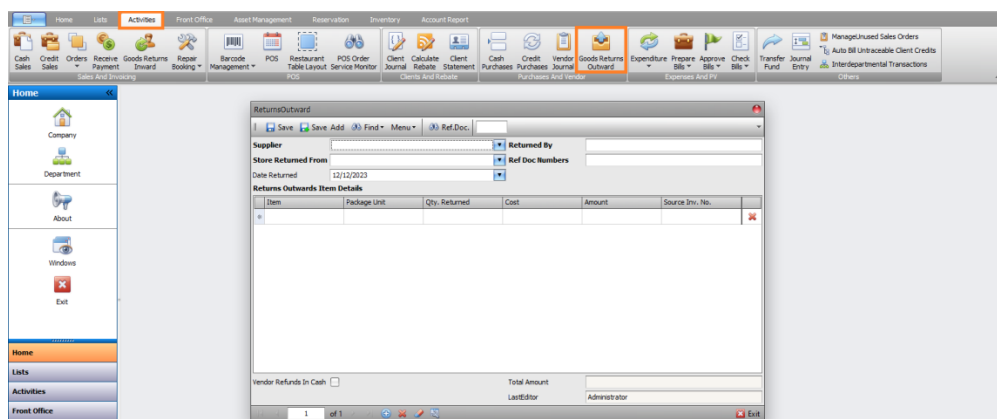


## Goods Return Outward

Goods return outward is the process through which a company sends previously purchased items back to the supplier. This situation might arise due to issues like product defects, expiration, or damage. Follow these steps to execute this action.

#### Step 1.

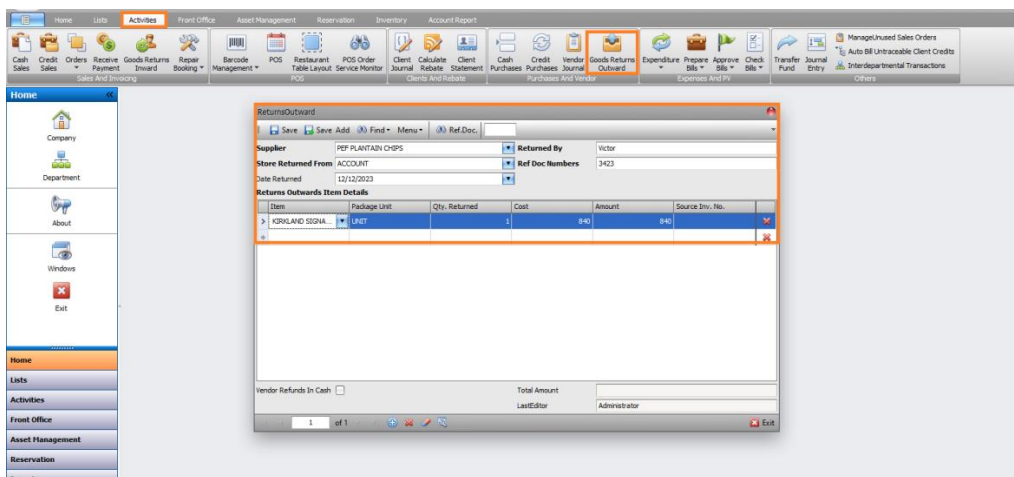
Access the **Activities menu** and choose **"Goods Returns Outward."**



#### Step 2.

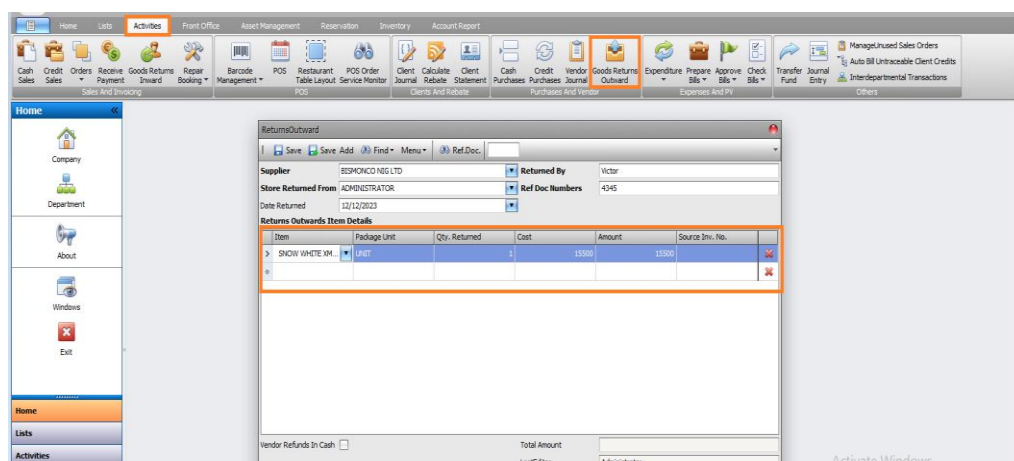
Choose the **Supplier's name**, designate the **Store Returned From**, enter the name of the officer returning the goods in the **"Returned By"** field, and input the **Reference Document Number**.

You also have the option to modify the date if necessary.



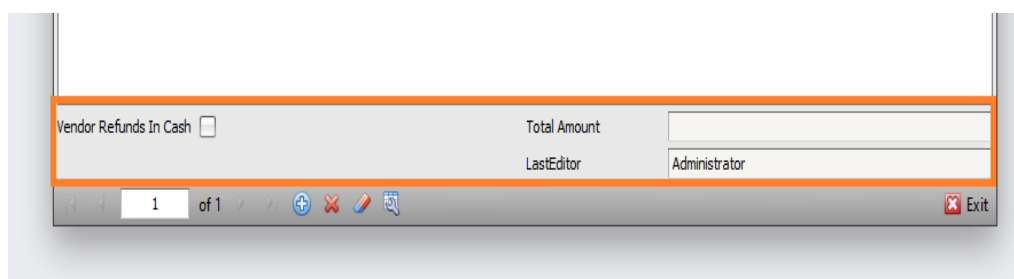
### Step 3.

In the "Returns Outwards Item Details" section, choose the **Item** for return, specify the **Package Unit**, **Quantity Returned**, and include the **Source Invoice No** if applicable



### Step 4.

Tick the box labeled (**Vendor Refunds In Cash**) and choose the **Account**.








### Note:

*Your Company might not receive a refund from the supplier; however, the supplier might facilitate a product exchange. In such cases, refrain from selecting **Vendor Refunds In Cash**.*

## Step 5.

Click **Save** and **Exit**.

ReturnsOutward



 Save  Save Add  Find  Menu  Ref.Doc.

**Supplier** BISMONCO NIG LTD **Returned By** Victor

**Store Returned From** ADMINISTRATOR **Ref Doc Numbers** 4345

**Date Returned** 12/12/2023



**Returns Outwards Item Details**

Item	Package Unit	Qty. Returned	Cost	Amount	Source Inv. No.	
> SNOW WHITE XM...	UNIT	1	15500	15500		
*						

Vendor Refunds In Cash

Total Amount

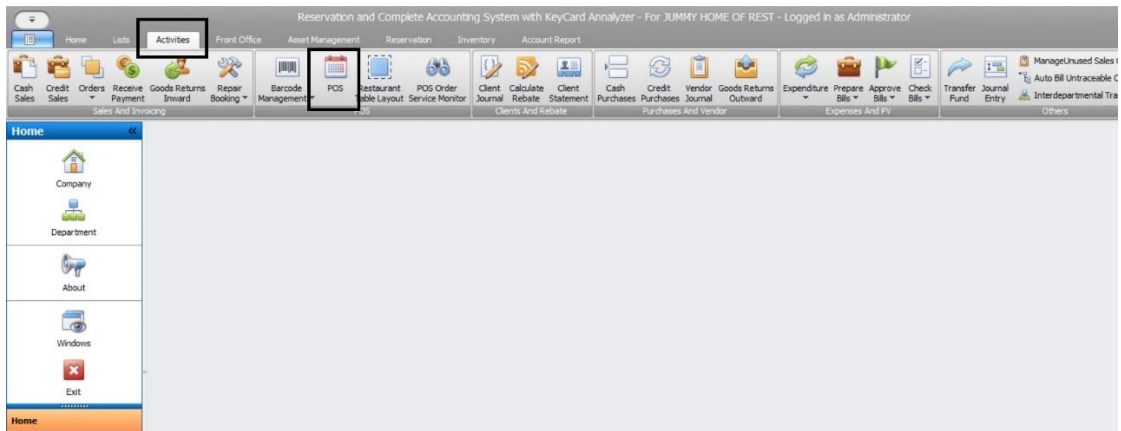
LastEditor Administrator

1 of 1   Exit

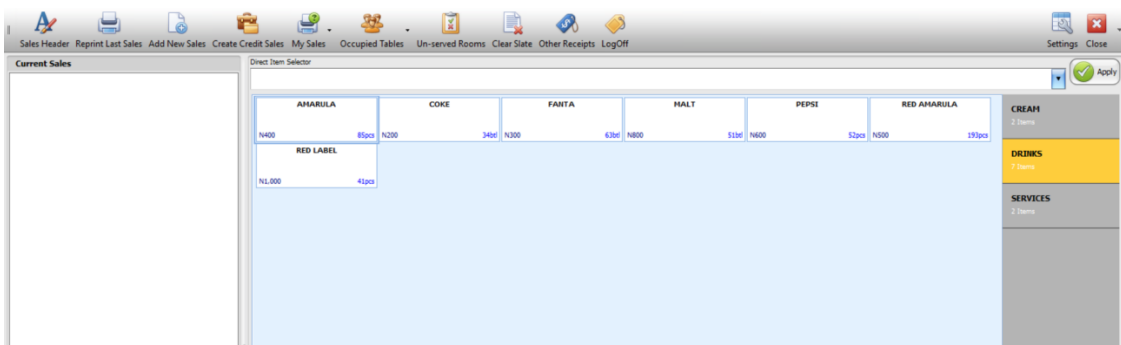
## Set Up Your Point Of Sales

### Set up POS interface

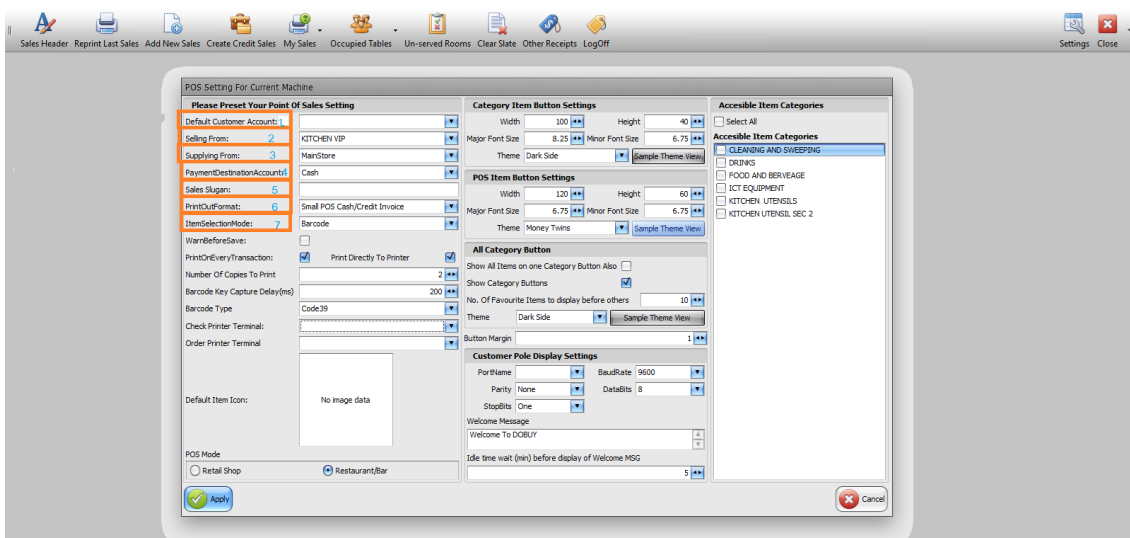
Navigate to the POS section by clicking on the Activities menu then click on the POS button.



Click on Settings to load the POS settings interface

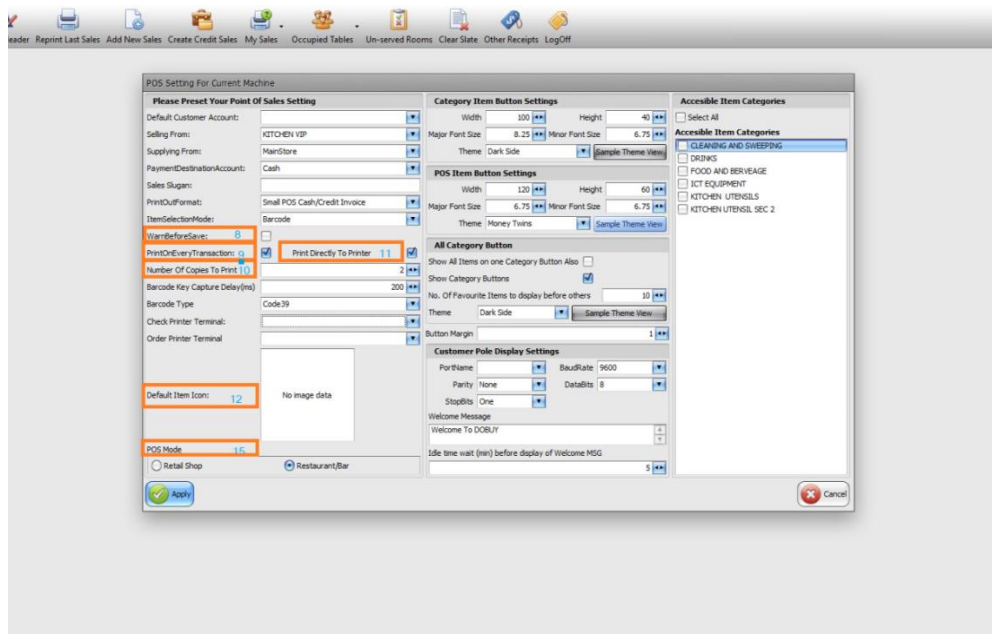


The POS setting interface



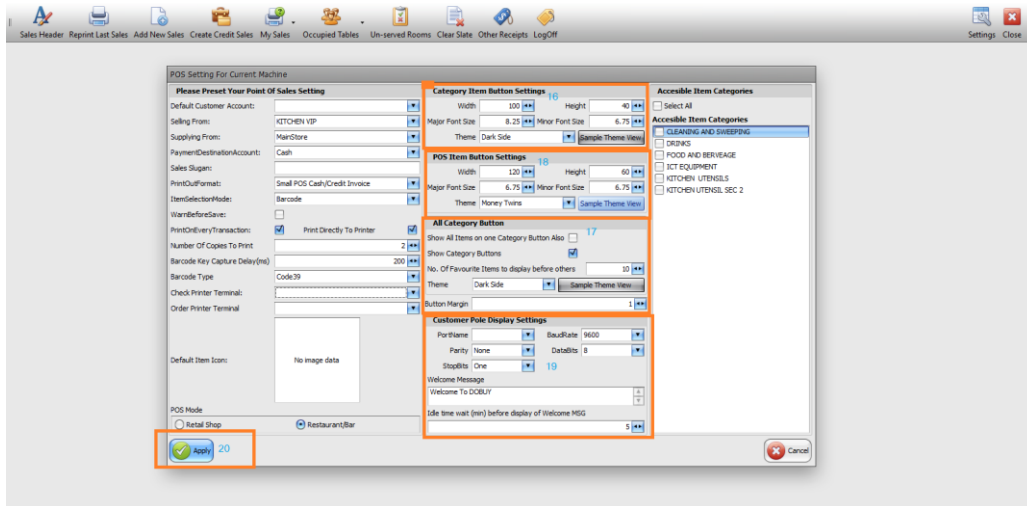
Now from the interface above, you can set your Point of Sales setting just as shown:

1. Select the general customer's name that will display on the POS invoice in 'Default Customer Account'.
2. Set the department where your goods are to be sold from, in 'Selling From'.
3. Also, set the department where your goods are to be supplied from, that is 'Supplying From'.
4. Select 'Payment Destination Account' of the sales made.
5. The invoice slogan displays the text in the box at the bottom of the invoice.
6. Select the 'Print Out Format', in this case, I selected small POS Cash/Credit Invoice, you may try other formats to see the one that suits your needs.
7. Item selection mode determines the position of the cursor on the POS interface, you can choose between 'Barcode' and 'Single Alphabet Label Key Select'.



8. Warn before save (dialog box) displays a warning message when a save button is clicked, check the box to enable or uncheck to disable.
9. Print on every transaction control the auto printing of the invoice when a save button is clicked, check the box to enable or uncheck to disable.
10. Check 'Print Directly To Printer' for your printout (s) to be printed or uncheck it for a preview, then you can print from the preview.
11. Select the number of printouts you want from the 'Number of Copies'.
12. The printer terminal allows you to select a default printer, click on the dropdown to display the list of installed printers, and select your favorite.

13. You can also have another printer for the special order or select the same printer for both of them.
14. You can choose a default image icon for all items by clicking on the default item icon image, the image browser will open and you can select the desired image. *This is optional*
15. You may also select a Restaurant/Bar if your business follows that.



16. In 'Category Item Button Settings', you can increase the Width and Height of the category and also choose a theme for the category.
17. You can check '**Show All Items on one Category Button Also**' to show the entire category item at a time and also check 'Show category Buttons'.
18. In 'POS Item Button Settings', also set the width and height to your taste.
19. In Customer Pole Display Settings, select the Port Name, Parity, etc., and type the welcome message, you can also set the 'Idle Time wait before display of welcome MSG' if you want.
20. Done with the settings? Then Click on apply, close, and reopen the POS interface to effect the changes.

## Pos Item Section

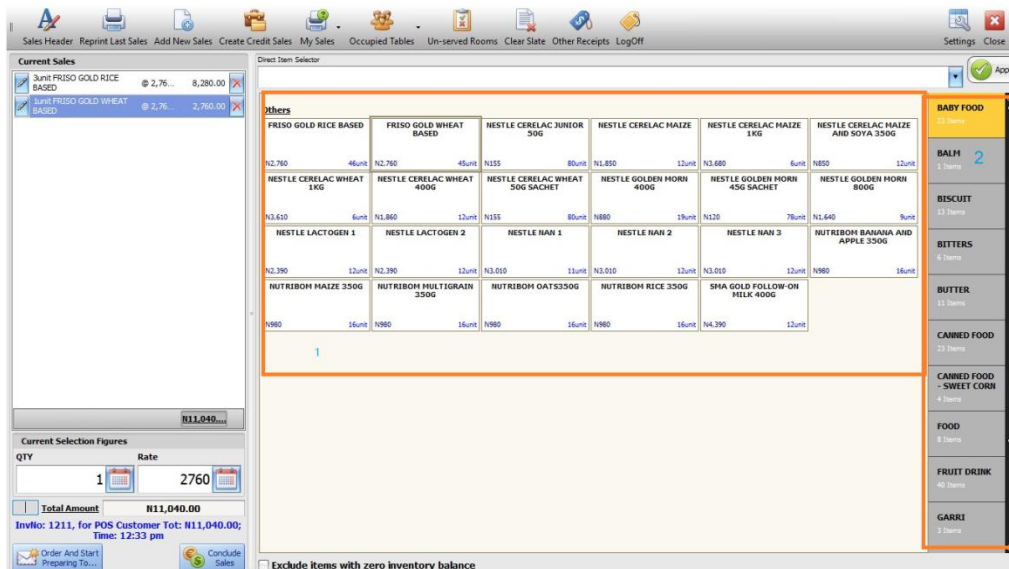
Okay, the second section of the POS is the item area section.

This section displays:

1. **Items:** This displays the item to be sold, and the price and quantity of the item.



## 2. Categories as a button displays the category and quantity of items



## Implement transactions in POS

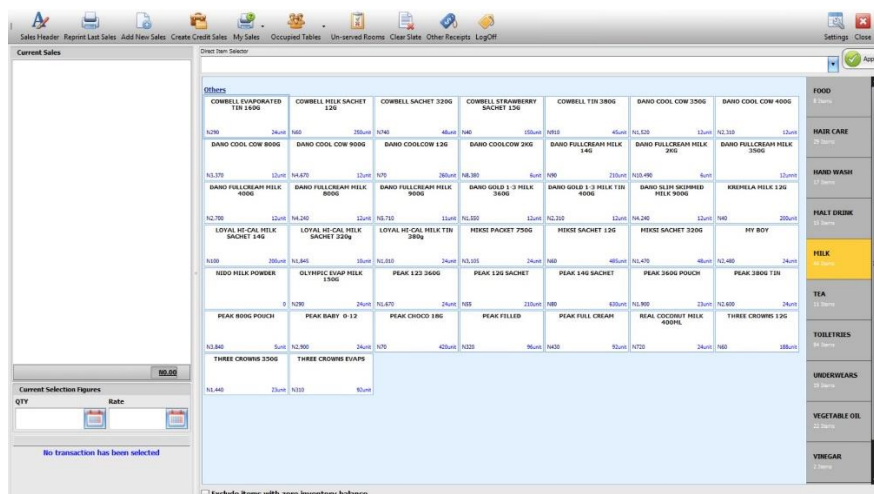
There are two ways of selecting items in POS Interface.

**1. POS Barcode scanner:** In this interface you will use the barcode scanner to select the item you want to sell. These are the steps to follow:

### Selecting item with POS Barcode scanner

**Step 1.** After the successful barcode registration, the next is to sell with the barcode reader.

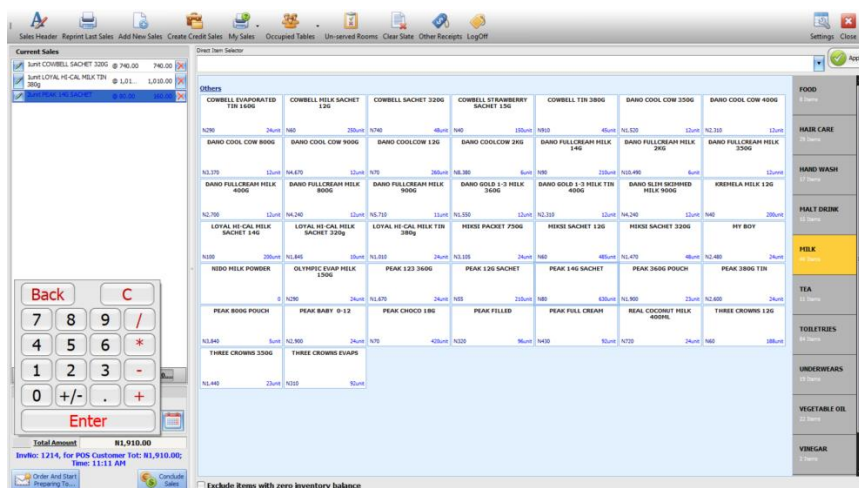
Note: This will only work if the item you want to sell has no barcode registered in the item setup.



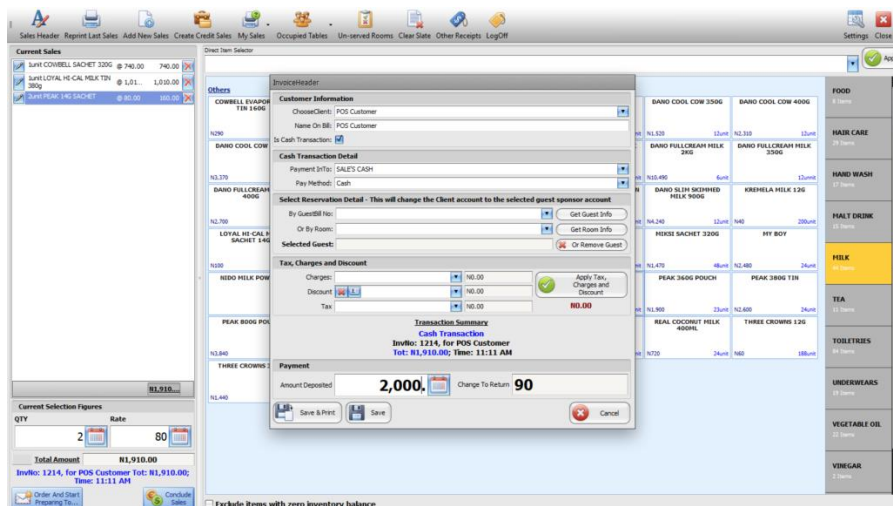
**Step 2.** Scan the product's barcode to initiate the display of the scanned product.



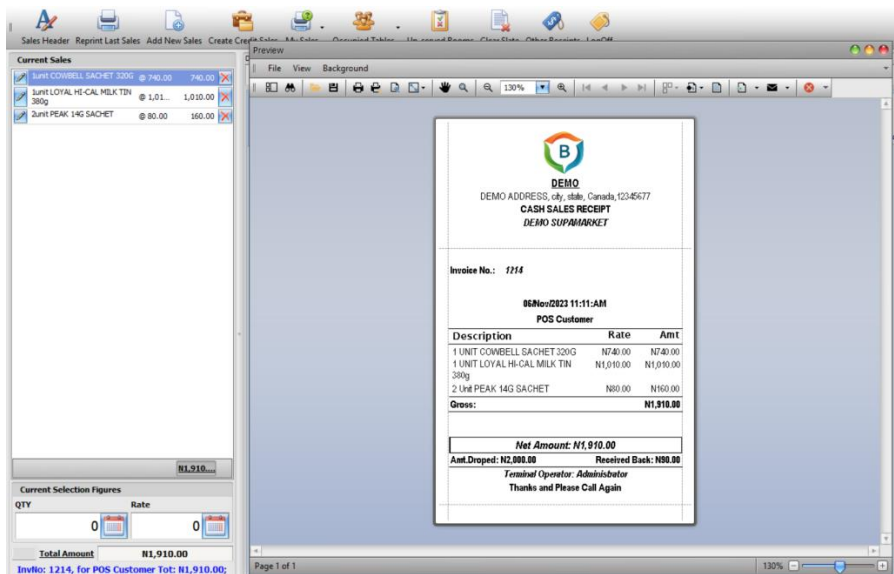
**Step 3.** Then a calculator-like will be displayed, select the quantity, and press enter button.



**Step 4.** When you are done, click conclude sales, and type the amount the customer is giving in “Amount Deposited” and click on Print to print the invoice.

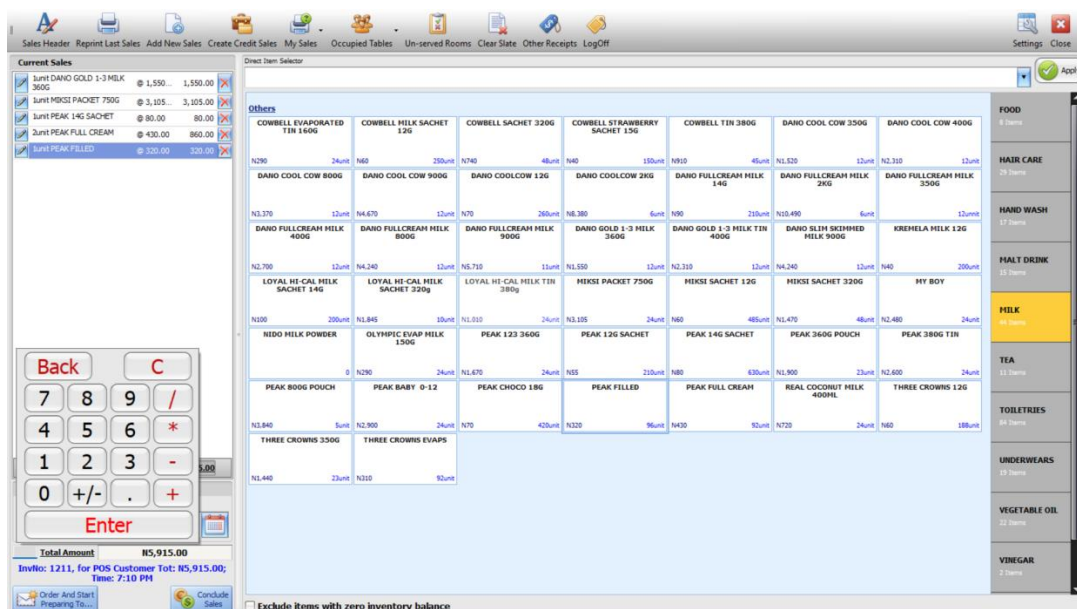


**Step 5. Preview the POS invoice and print**



**2. Manual selection:** The Next section is Current Sales. This section displays the list of items selected, their quantity, and rate, and also automatically calculates the total amount of the items selected on the left side. These are the steps to perform sales:

**Step 1.** Click on the Category Item and the lists under that category will be displayed, select the item you want to sell. Then a calculator-like will be displayed, select the quantity the customer wants and press Enter.



**Step 2.** Click on 'Conclude Sales', and the 'InvoiceHeader' form will open then fill in the 'Customer information'. Note: if the customer has an account already, then select his or her

name from 'ChooseClient', if not and the customer wants his name on the invoice, then type his name on 'Name on Bill'. This interface is designed specifically for changing client names and switching current transactions from cash to credit and vice versa. You can select the appropriate name of the client, change the payment method and payment destination account, and can also switch the cash transaction to a credit transaction by unchecking the box tagged 'cash transaction'. From **Cash Transaction Detail**, select 'Payment In To', and select 'Pay Method' if the customer is not paying cash.

The screenshot shows the 'Direct Item Selector' application window. The 'InvoiceHeader' section contains 'Customer Information' with 'ChooseClient' set to 'POS Customer' and 'Name On Bill' set to 'GOLD DEE'. A red box highlights the 'Is Cash Transaction' checkbox, which is checked. Below this is the 'Cash Transaction Detail' section, where 'Payment In To' and 'Pay Method' are both set to 'Cash'. The 'Select Reservation Detail' section has 'By Guest Bill No.' and 'Or By Room:' dropdowns, with 'Get Guest Info' and 'Get Room Info' buttons. The 'Selected Guest' field is empty, with an 'Or Remove Guest' button. The 'Tax, Charges and Discount' section shows 'Charges', 'Discount', and 'Tax' all set to '\$0.00', with an 'Apply Tax, Charges and Discount' button showing '\$0.00'. The 'Transaction Summary' section displays 'Cash Transaction', 'InvNo: 6202, for GOLD DEE', and 'Tot: \$3,150.00; Time: 11:12'. The 'Payment' section shows 'Amount Deposited' as '4,000' and 'Change To Return' as '850'. At the bottom are 'Save & Print', 'Save', and 'Cancel' buttons.

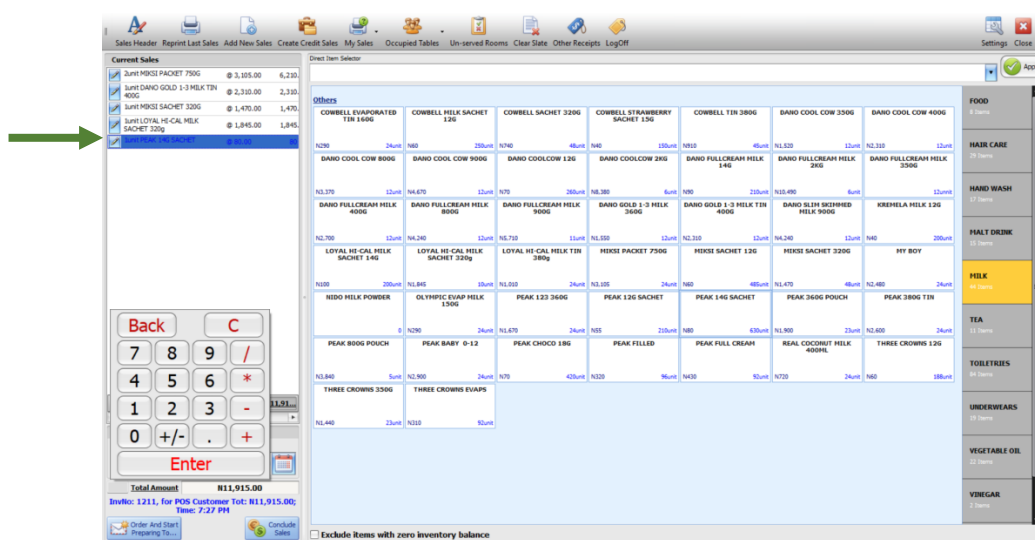
**Step 3.** Type in the amount deposited and the change will be calculated automatically if any. At this point, you have the opportunity to convert to a credit sale and specify the customer's name, pick a guest account to bill in the case of hotel operation and apply charges, discounts, and tax as the case may be before saving and printing.

This is a close-up view of the software interface. It shows the 'Tax, Charges and Discount' section with 'Charges', 'Discount', and 'Tax' all set to '\$0.00'. The 'Apply Tax, Charges and Discount' button shows '\$0.00'. Below this is the 'Transaction Summary' section, which displays 'Cash Transaction', 'InvNo: 6202, for GOLD DEE', and 'Tot: \$3,150.00; Time: 11:12'. The 'Payment' section shows 'Amount Deposited' as '4,000' and 'Change To Return' as '850'. At the bottom are 'Save & Print', 'Save', and 'Cancel' buttons.

**Step 4.** Finally, click the **Save & Print** button to print this transaction through the printer you selected in the setting, and if you did not select any, then the output is going to be displayed. You can also click Save to save this transaction.

## Editing items in the POS

Another important Sales feature is the flexibility of removing and editing already selected items. For instance, if the quantity of PEAK is 1 instead of 3, to change that simply click on the pen icon beside the item, the quantity field will be activated, click 3 and press Enter to effect the changes.



## Reprint Last Transaction

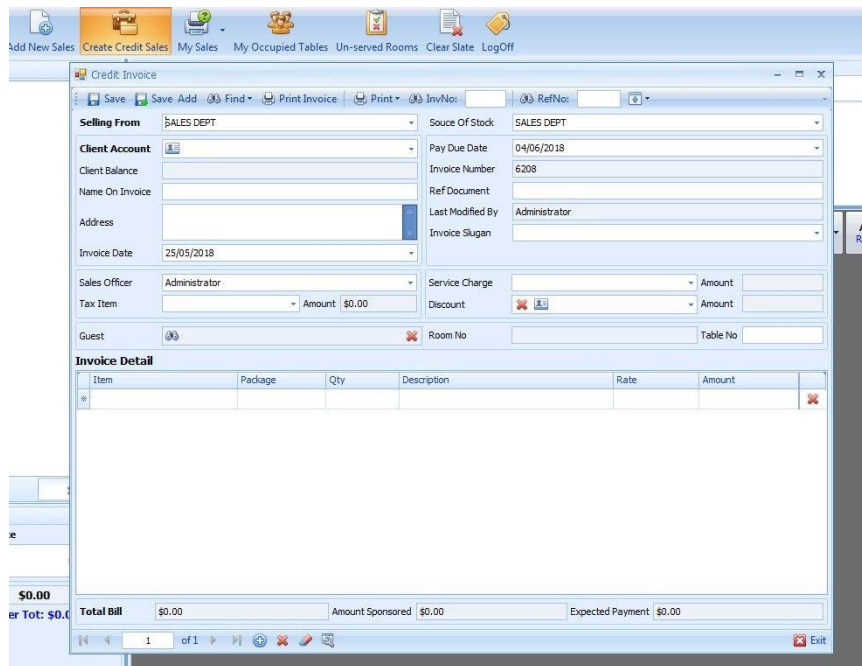
We can also **Reprint the Last Transaction**, well this is just a command that searches through the records to reprint the last transaction when it's being selected. No unique interface except the confirm message box, choose the yes or no option to complete the request.





## Create Credit Sales

**Create Credit Sales** button is used to make instant credit sales on the POS interface. By clicking on it, a credit invoice editor will appear and you can from there create a credit invoice.



**My Sales** button is a functional button that previews a dropdown menu for loading sales analyses.

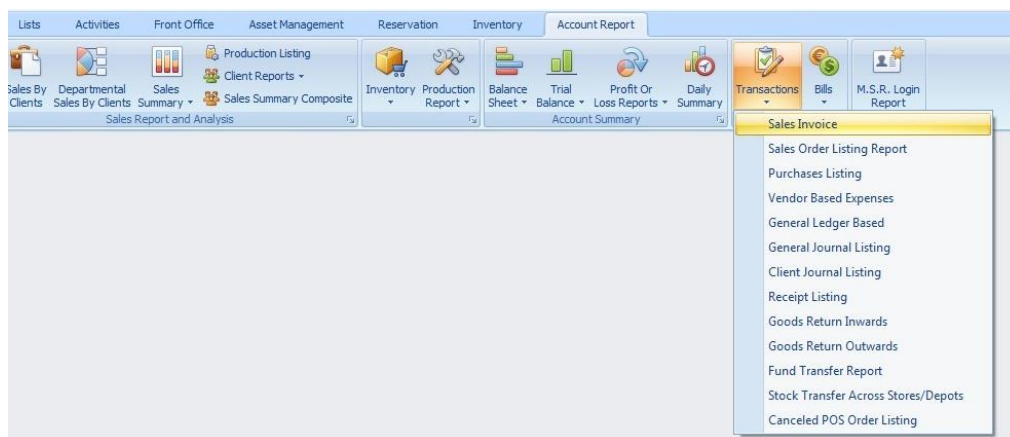


## Point of Sales Reports

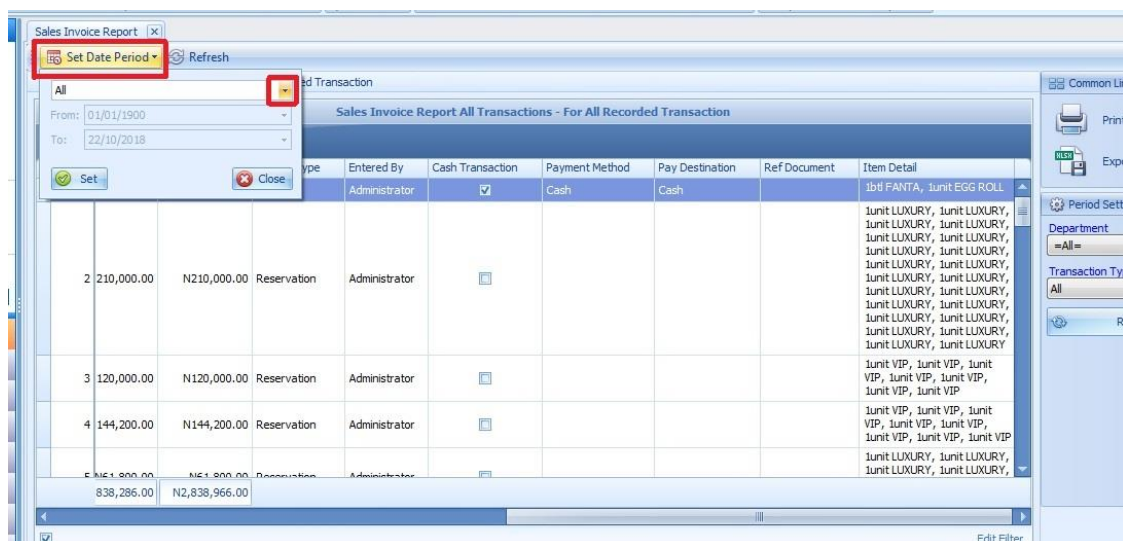
### Sales Summary

This report displays all recorded sales transactions within a specified time frame. To access this report, please follow these steps:

**Step 1:** Begin by clicking on the '**Account Report**' menu, then navigate to '**Transactions**' and click to access the drop-down menu. Finally, select '**Sales Invoice**' from the options.

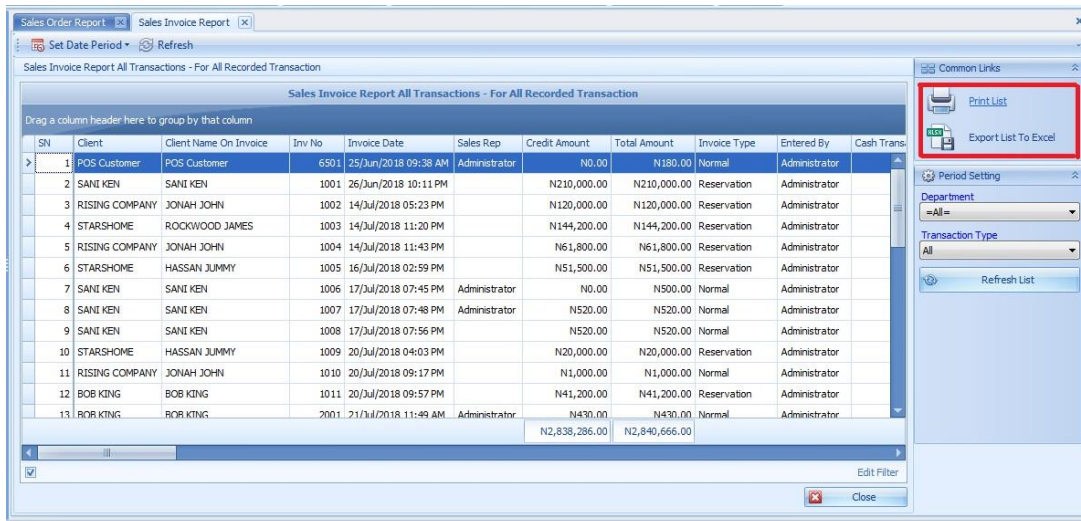


**Step 2:** To access the date panel, click on '**Set Date Period.**' By default, the date is set to yesterday, but you can change it by selecting the field or clicking on the small arrow to access the drop-down menu with pre-set date options of your choice. Alternatively, select '**Custom**' to enter the date manually, and then click '**Set**'.





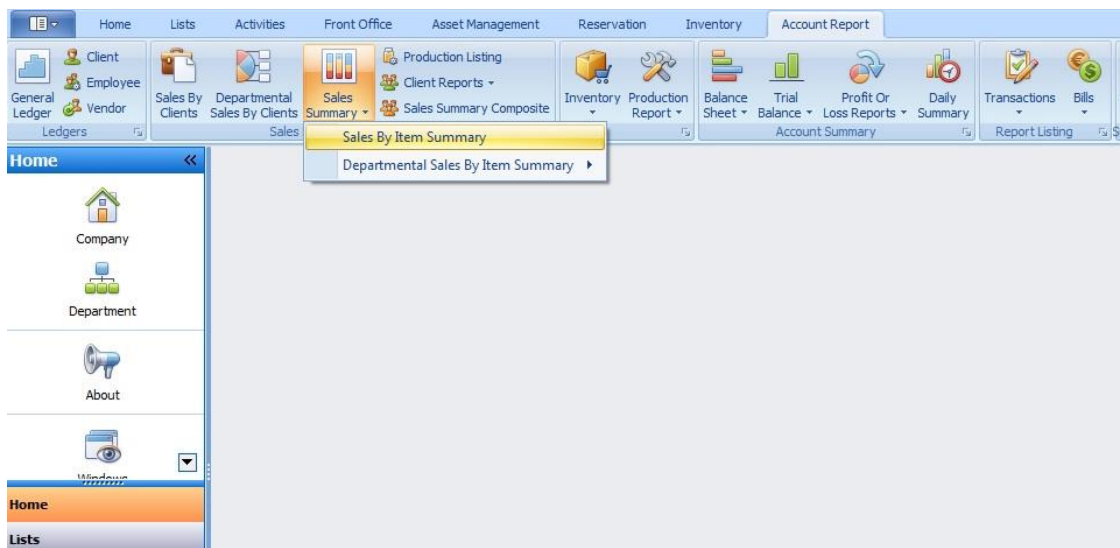
**Step 3:** When it loads, sort, group or filter before printing.



### Sales By Item Summary Report

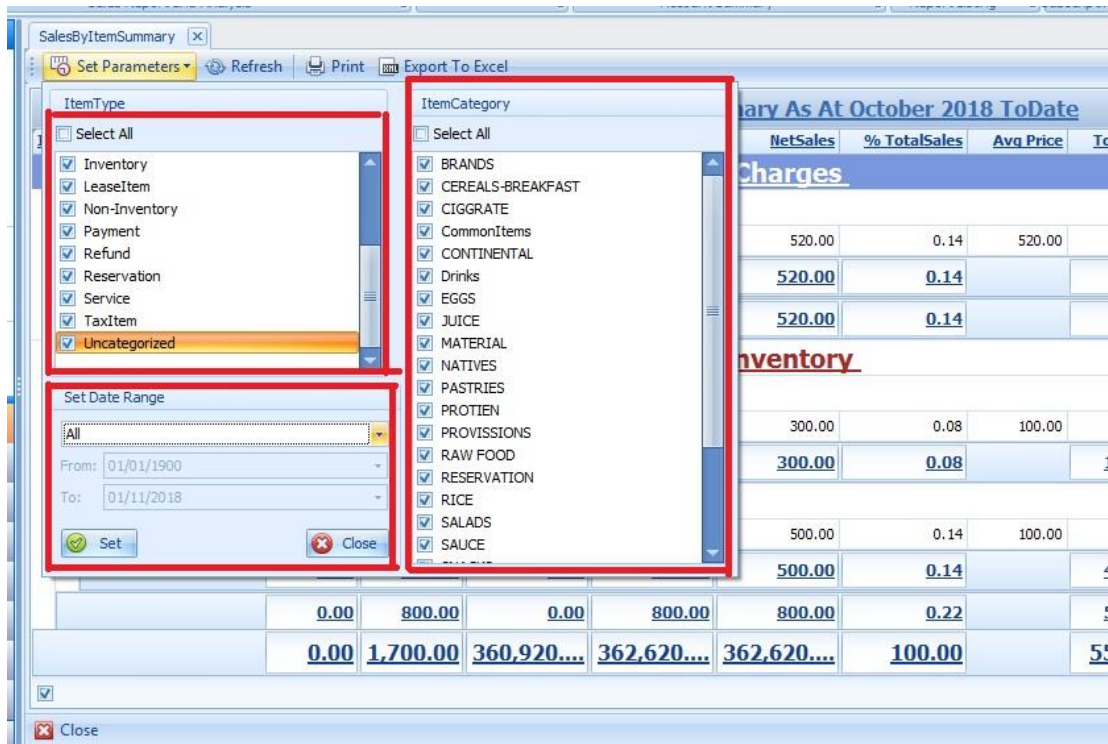
Sales by item summary is a report that shows the entire recorded item being sold within a specified period of time. To view sales by item summary, follow these steps:

**Step 1:** Click on **Account Report** menu, navigate to **Sales Summary** and click to access the drop-down, and then select **Sales by Item Summary**.

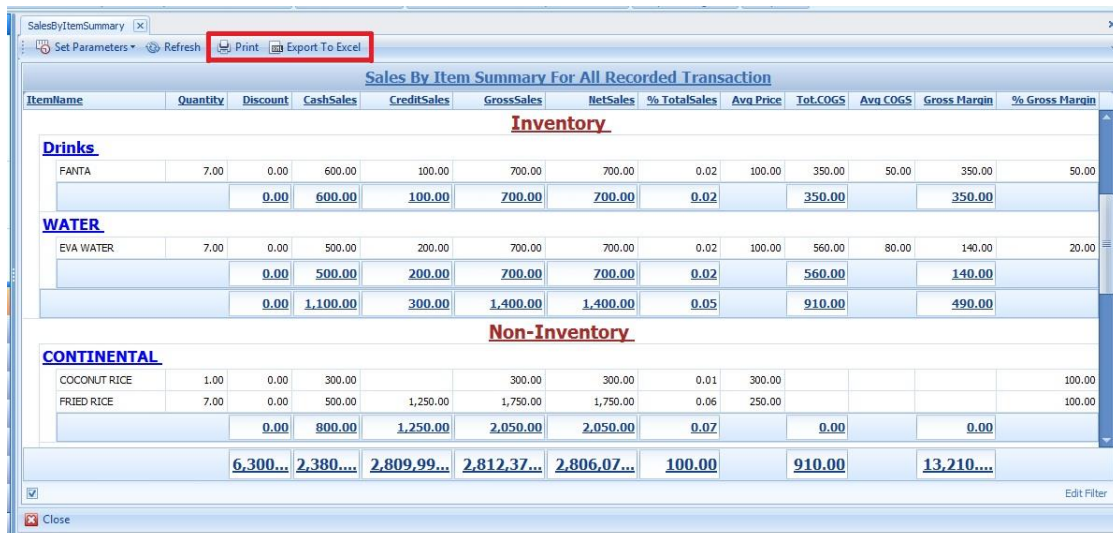


**Step 2:** Check the **ItemType** or check **Select All** to check the entire item, likewise check the **ItemCategory** or check **Select All** to check the entire category. Access the date panel by

clicking on **Set Date Period**, you can change the date by selecting the field or click on the small arrow to access the drop-down pre-set date of your choice. You can also select **Custom**, to enter the date manually and then click **Set**.



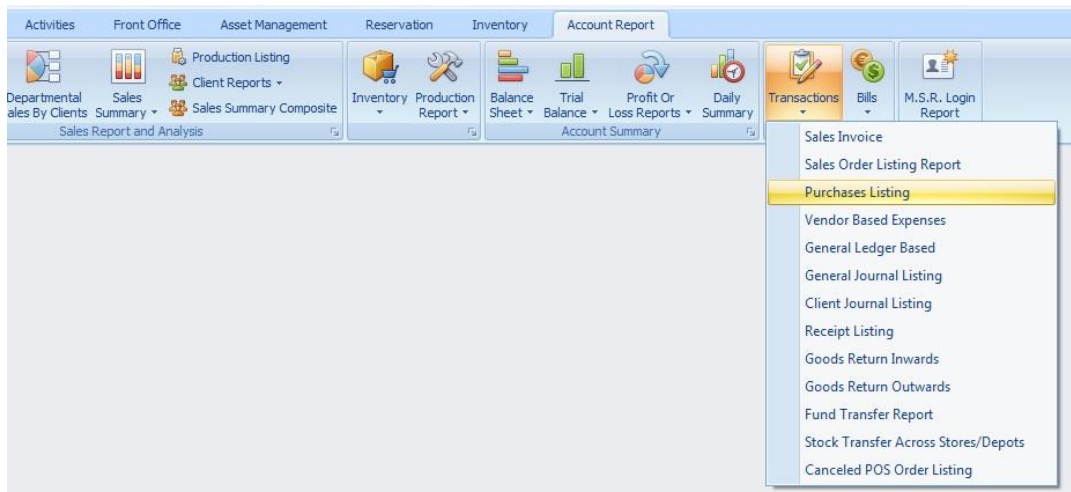
**Step 3:** When it loads, you can sort, group or filter before printing.



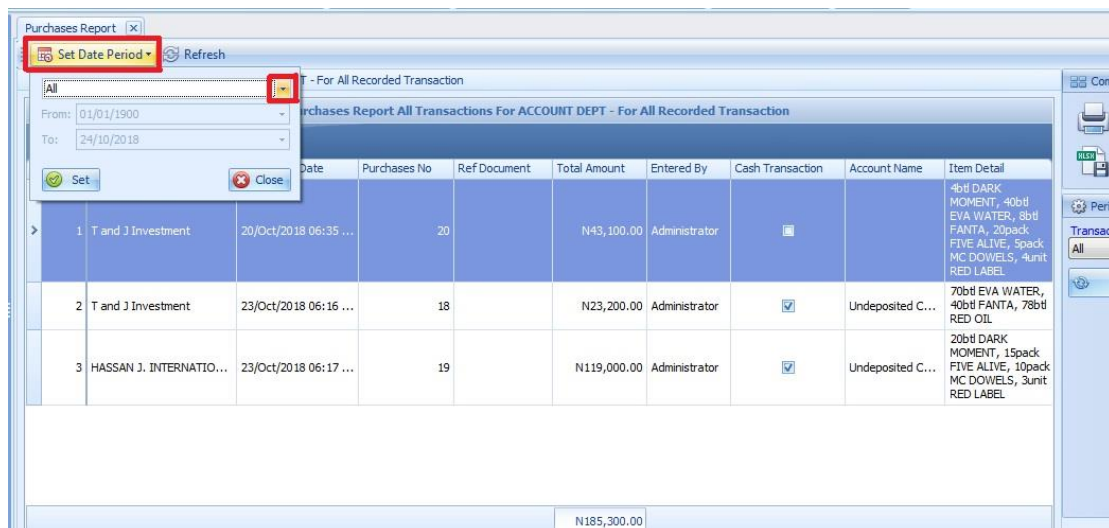
## Purchase Listing

This is the report that shows all recorded purchase transactions within a specified period of time. These are the steps to view this report:

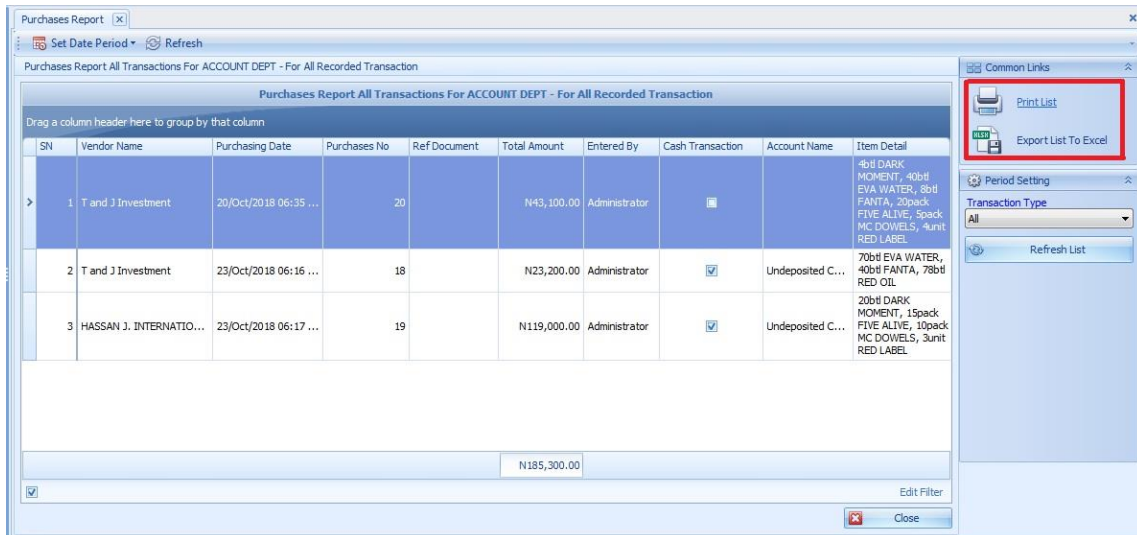
**Step 1:** Click on **Account Report** menu, navigate to **Transactions** and click to access the drop-down, and then select **Purchase Listing**.



**Step 2:** Access the date panel, on **Set Date Period**. By default, the date is set to yesterday, but it can be changed by selecting the field or click on the small arrow to access the drop-down pre-set date of your choice. You can also select **Custom**, to enter the date manually and then click **Set**.



**Step 3:** When it loads, you can sort, group or filter before printing.



## Receipt Listing

This is the report that shows all recorded sales receipt within a specified period of time.

These are the steps to view this report:

**Step 1:** Click on **Account Report** menu, navigate to **Transactions** and click to access the drop-down, and then select **Receipt Listing**.

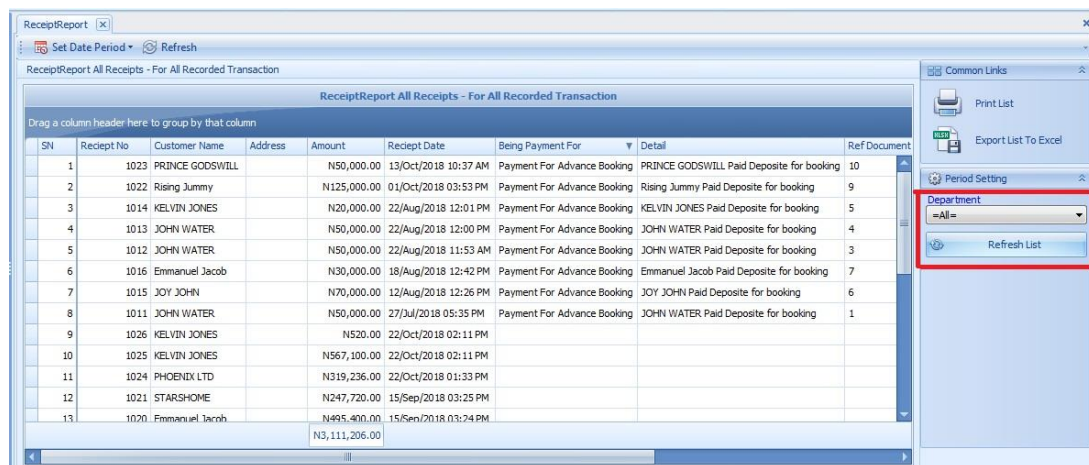




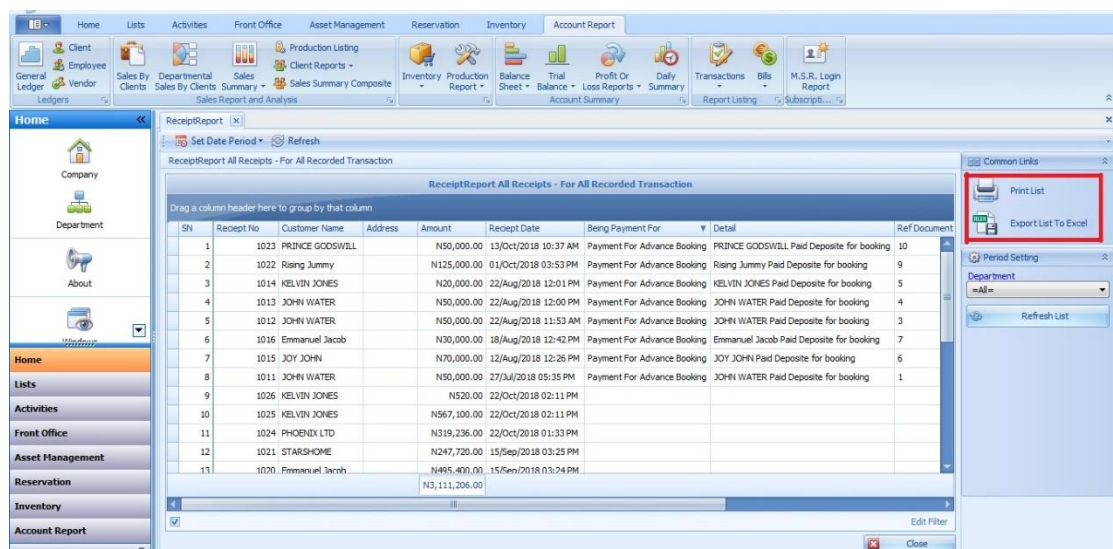
**Step 2:** Access the date panel by clicking on **Set Date Period**. By default, the date is set to yesterday, but it can be changed by selecting the field or click on the small arrow to access the drop-down pre-set date of your choice. You can also select **Custom**, to enter the date manually and then click **Set**.



**Step 3:** Select the **Department** that made the expenses or select **All** to view all the receipt. Then click **Refresh List** button to reload the page.



**Step 4.** When it loads, you can sort, group or filter before printing.

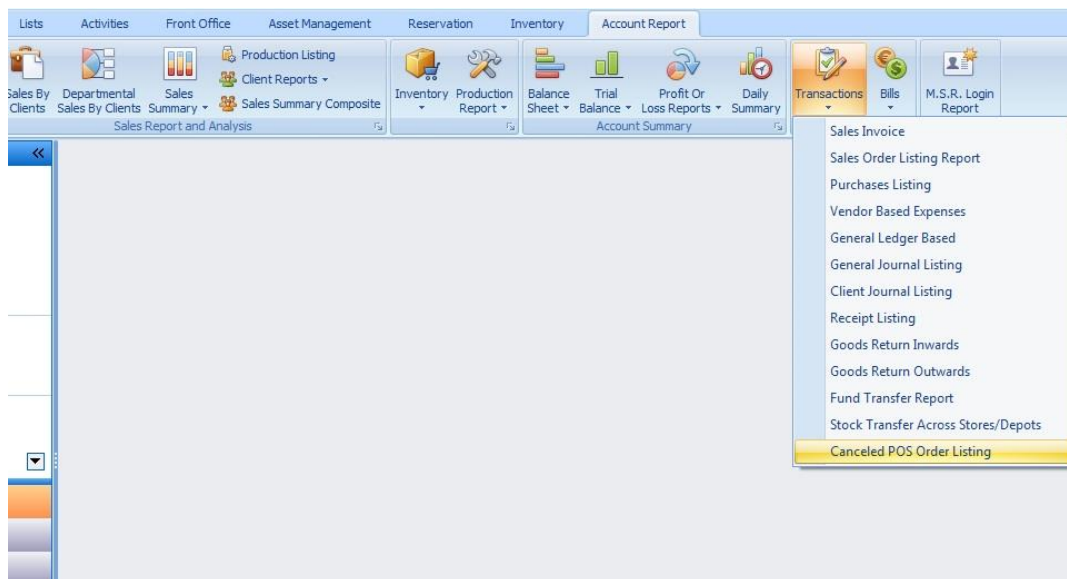


## Cancelling POS Order Listing

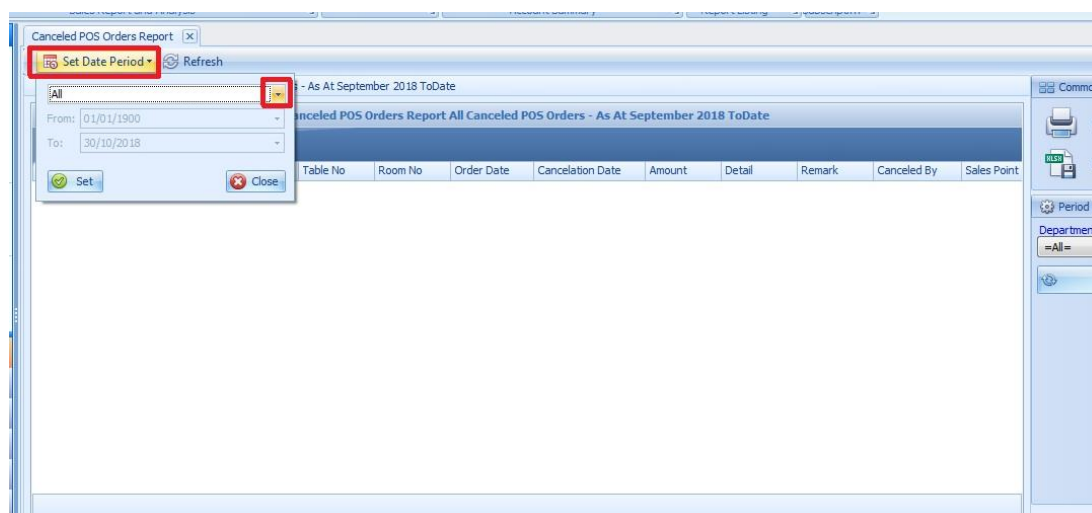
This is the report that shows all the recorded cancelled POS order within a specified period of time. To view this report, these are the steps:

### Step 1:

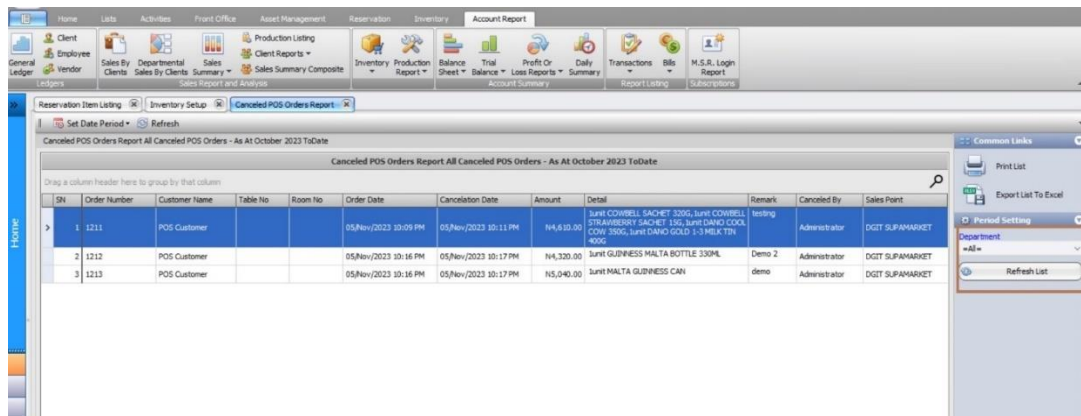
- Click on the 'Account Report' menu.
- Navigate to the 'Transactions' section and click to reveal a drop-down menu.
- From the drop-down menu, select 'Cancelled POS Order Listing.'



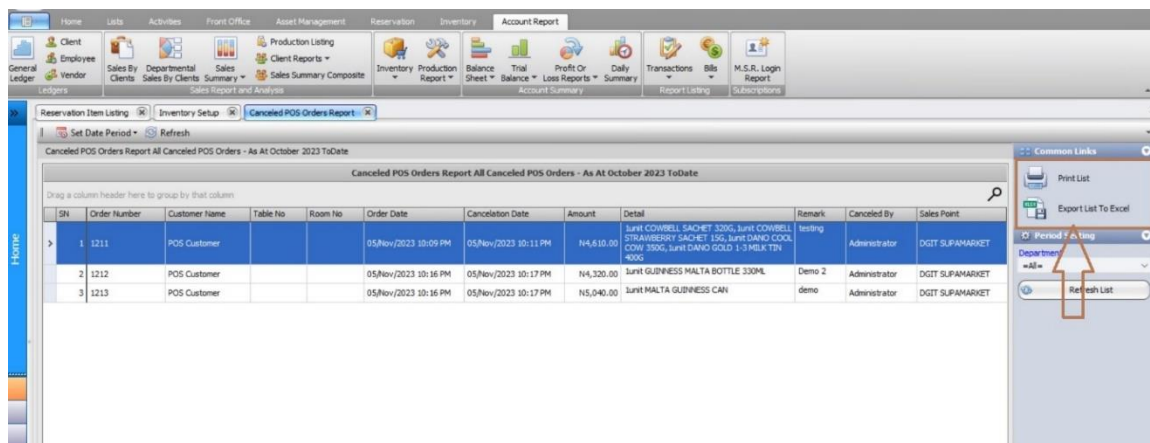
**Step 2:** To access the date panel, click on "Set Date Period." Select the button by clicking on the small arrow to access a drop-down menu of pre-set dates, or you can choose "Custom" to manually enter a date and then click "Set."



**Step 3:** Choose the **Department** responsible for the expenses or select "**All**" to view all receipts, and then click the "**Refresh List**" button to refresh the page.



**Step 4:** Once the page loads, you have the flexibility to sort, group, or apply filters before initiating the printing process.



For more information on the account report, please refer to the 'Account/Report' section on the [support](#) page.



