

Configure Your Business Details

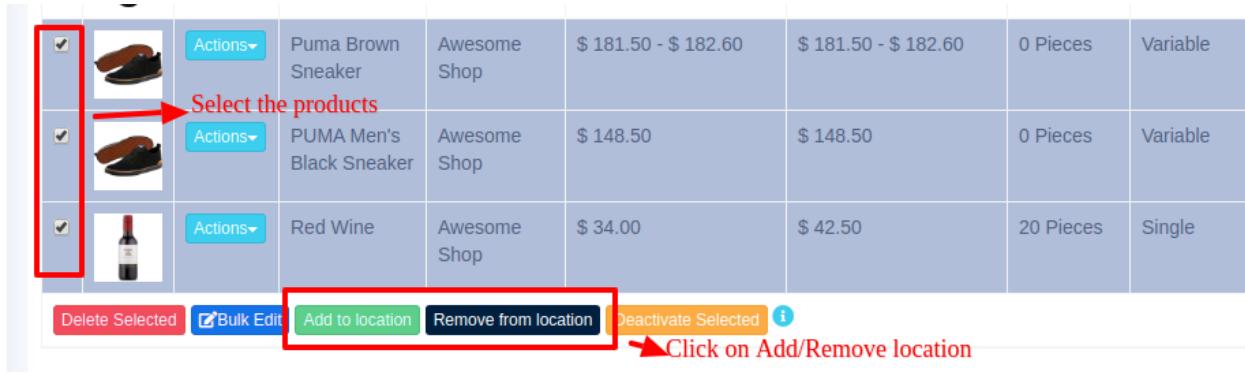
Upon logging in, you will be directed to the homepage. Your first task is to set up your business by providing the following details:

Brand: Enter all applicable brands associated with your business.

Tax Rates: Establish taxes and tax groups.

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Tax Rates:

To add a new tax, navigate to Settings -> Tax Rates -> Add.

Provide a descriptive name (e.g., "VAT@5%") and specify the corresponding tax rate.

Tax Groups:

At times, you may need to apply multiple taxes to an invoice or purchase. In such cases, create tax groups by combining multiple taxes.

To add a Tax Group, click on the Add button, assign a meaningful name, and select the taxes you wish to include in this tax group.

The tax rate of the tax group will be the sum of the tax rates of its sub-taxes.

If a sub-tax is modified, the corresponding tax group's tax rate will also be updated accordingly.

You cannot delete a tax if it is being used in a Tax Group.

Disable Tax:

To disable Tax Rates in settings:

Go to Settings -> Business Settings.

Uncheck "Enable inline tax in purchase and sell."

Uncheck "Enable Price & Tax info."

Select "Default Sale Tax" as None.

Note: Disabling inline tax in purchases and sales will result in the Price Inc tax column not being displayed in the POS screen.

Enabling & Using Payment Account or Bank Account:

- Payment accounts function like bank accounts, allowing transactions such as transfers, deposits, and payments to suppliers or from customers.
- Enable Payment Accounts:
 1. Go to Settings -> Business Settings -> Modules.
 2. Enable the "Payment Account" option and save the settings.
- After enabling, the "Payment Accounts" option will be visible in the left navigation bar.
- Payment Account Type & Sub-Type:
 1. Go to Payment Accounts -> List Accounts -> Account Types.
 2. Add Account Type or Sub-Account Type as needed, specifying parent account types where applicable.
- Creating Payment Accounts:
 1. Navigate to Payment Accounts -> List Accounts and click the Add button.
 2. Fill in account details such as name, account number, type, opening balance, and additional information.
- Transferring Funds between Payment Accounts:

- Transfer funds between payment accounts by accessing Payment Accounts -> List Accounts and clicking on the fund transfer option.

Name	Account Type	Account Sub Type	Account Number	Name	Balance	Account Status	Actions
Bank Account	Account		1000000000	73,200.00	00	Active	
Business	Account		1000000001	16,115.65	00	Active	
Business Income	Account		1000000002	1,000.00	00	Active	
Bank account	Account		1000000003	2,700.00	00 Opfr. 3 Opfr. 3	Active	
Bank Account - ACC 0000000000	Account		1000000004	941.00	00	Active	
Total					91,315.65		

Showing 1 to 5 of 5 entries.

Setting Default Payment Accounts for Payment Methods:

1. Navigate to Add/Edit Business Location.
2. In this section, you can select the default payment account for each payment method.
3. Link the payment account to the respective payment method.
4. When adding a payment for sales, purchases, or expenses:

- Upon selecting the payment method, the associated payment account will be automatically selected.

The screenshot shows two overlapping windows. The left window, titled 'Payment Options: ⓘ', lists eight payment methods: Cash, Card, Cheque, Bank Transfer, Other, Custom Payment 1, Custom Payment 2, and Custom Payment 3. Each method has a checkbox labeled 'Enable' to its right. A red box highlights the 'Enable' column, and a red arrow points from it to the right window. The right window, titled 'Link payment method to payment account ⓘ', is titled 'Default Account'. It contains eight dropdown menus, each corresponding to one of the payment methods from the left window. The first dropdown, for 'Cash', shows 'Cash' as the selected option. A blue box highlights the 'Default Account' window. At the bottom of the left window, a red text box contains the instruction: 'Select the payment method which will be enabled for this business location'. At the bottom right of the right window are 'Save' and 'Close' buttons.

Payment Method	Enable
Cash	<input checked="" type="checkbox"/>
Card	<input checked="" type="checkbox"/>
Cheque	<input checked="" type="checkbox"/>
Bank Transfer	<input checked="" type="checkbox"/>
Other	<input checked="" type="checkbox"/>
Custom Payment 1	<input checked="" type="checkbox"/>
Custom Payment 2	<input checked="" type="checkbox"/>
Custom Payment 3	<input checked="" type="checkbox"/>

Link payment method to payment account ⓘ

Default Account ⓘ
Cash
Prime Bank Ltd.
None

Select the payment method which will be enabled for this business location

Save Close

Opening balance:

Opening balance is the balance contact (customer or supplier) have at the beginning of using the software.

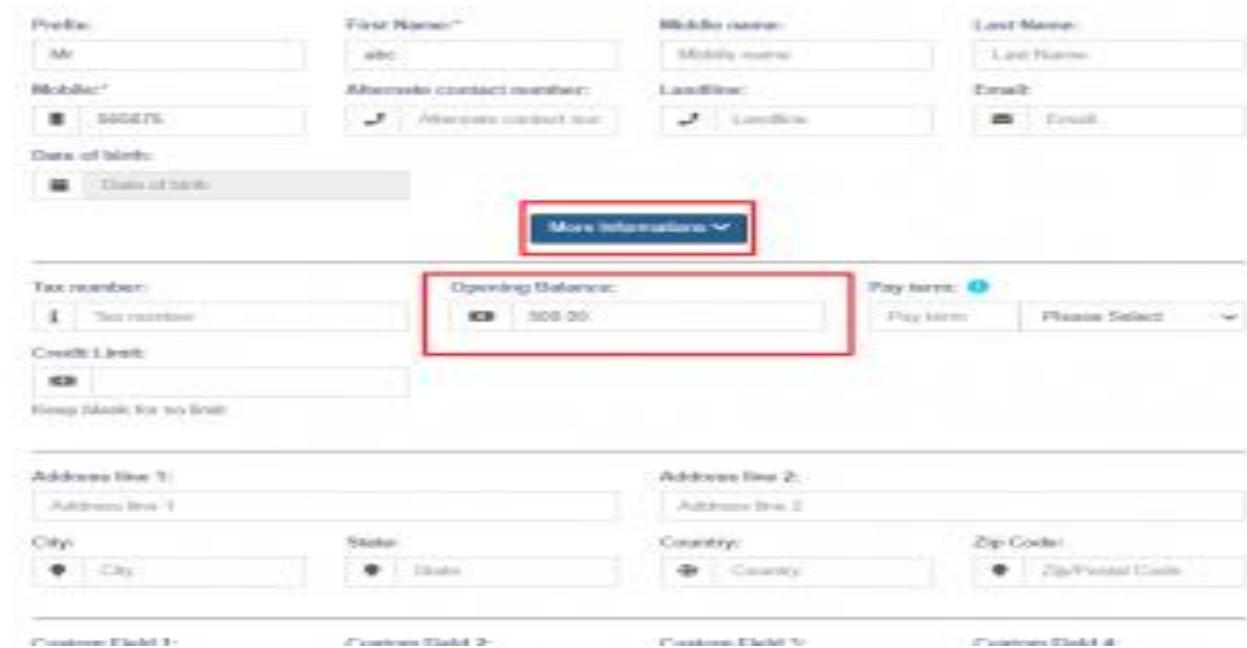
Suppose you're shifting the data from another software to SMARTBMS ERP then the opening balance of the contact will be the balance amount which the contact has to pay/receive to/from you.

Opening balance for customer = Amount the customer has to pay

Opening balance for supplier = Amount you have to pay to the supplier.

Adding Opening balance

You can add an opening balance when adding/editing the supplier or customer. In the add contact screen, you will find the opening balance field.



The screenshot shows the 'Add Contact' form with various fields for personal information, business details, and payment terms. The 'Opening Balance' field is highlighted with a red box. The form includes fields for First Name, Middle Name, Last Name, and Email, as well as mobile and landline numbers. Payment terms are set to 'Please Select'. The 'Opening Balance' field contains '500.00'.

First Name* abc	Middle name* Middle name	Last Name* Last Name	
Mobile* 9876543210	Alternate contact number* 1234567890	Landline* Landline	
Email* Email			
More Information			
Tax number* Tax number		Opening Balance* 500.00	
Credit Limit* 1000		Pay terms* Please Select	
Address Line 1: Address Line 1			
City* City	State* State	Country* Country	Zip Code* Zip/Postal Code
Address Line 2: Address Line 2		Address Line 3: Address Line 3	
Address Line 4: Address Line 4		Address Line 5: Address Line 5	

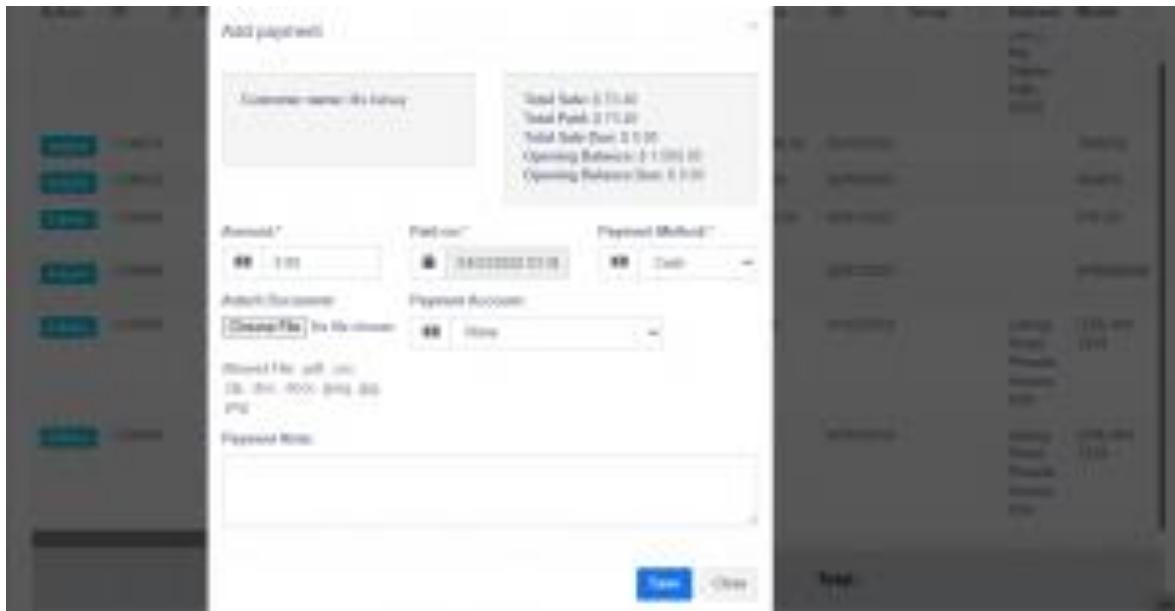
View Opening balance payment

To view the opening balance of contact, go to List Supplier/customer, go to view, and on the view page, you will find the opening balance & opening balance due.

Pay or receive payment of opening Balance

Adding payment of the opening balance is the same as any other payments. Go to list Customer/Supplier -> Actions -> Pay.

It will open a popup modal where you can enter the payment amount.



1. Customer & Supplier Ledger

To view customer or supplier ledger

1. Go to Contacts -> Supplier/Customer and click on actions button
2. In that you will be able to see Ledger for the customer or supplier.
3. You can select a date-range and use the checkbox filters to show/hide certain transaction type.

Essentials
Account Summary

01-01-2024 To 31-12-2024

DOUGLAS MORRIS
ERNEST CHEMIST LTD,
DOUGLAS MORRIS, GHANA,
233
Mobile: 0546000064

Opening Balance	₵ 4,532.67
Total Purchase	₵ 145,102.85
Total paid	₵ 131,367.09
Advance Balance	₵ 0.00
Balance due	₵ 18,268.43

Showing all invoices and payments between 01-01-2024 and 31-12-2024

Date	Reference No	Type	Location	Payment Status	Debit	Credit	Balance	Payment Method	Others
01-01-2024 00:00		Opening Balance			₵ 4,532.67		4,532.67 CR		
23-01-2024 09:08	1923012	Purchase	QUEENSTREET PHARMACY LTD	Paid	₵ 7,206.95		11,739.62 CR		
06-02-2024 21:58	0003132	Purchase	QUEENSTREET PHARMACY WAREHOUSE(ADUKROM)	Paid	₵ 22,300.85		34,040.47 CR		
12-02-2024 08:11	PP2024/1049	Payment			₵ 4,532.67		29,507.80 CR	Cheque	Advance payment
12-02-2024 12:23	SIN2402HS20000083	Purchase	QUEENSTREET PHARMACY (WHOLESALE)	Paid	₵ 95,558.36		125,066.16 CR		
13-02-2024 11:27	PP2024/1056	Payment	QUEENSTREET PHARMACY LTD		₵ 7,206.95		117,859.21 CR	Cash	CHQ NO FB 200811Payment For: 1923012
15-02-2024 22:45	PP2024/1138	Payment	EXQUISTE COSMETICS (ABURA)		₵ 1,768.26		116,090.95 CR	Cash	Payment For: PUR2024/0705

Adding Discount for

Customer/Supplier on Balance due:

Discount for balance due amount can be added for customer/supplier.

Click the add discount button on the customer/supplier ledger screen

View Contact

Harry Customer

Address
HARRY,
Living Street,
PHOENIX, ARIZONA, USA
Mobile
(311) 123-1234

Add Contact

Ledger Sales Subscriptions Documents & Note Payments Activities Contact Persons

Date Range: 01/01/2023 - 10/10/2023 Ledger Format: Format 1 Format 2 Business Location: All Locations

Address: Harry,
Living Street, Phoenix, Arizona,
USA, 85001

On clicking the button, it shows a popup, enter the details and click save.

The discounted amount will be accounted for in their ledger.

Account Summary

Opening Balance: \$ 770.00
Debit: \$ 1,000.00
Credit: \$ 0.00
Advance: \$ 0.00
Ledger Discount: \$ 0.00
Balance Due: \$ 6,470.00

Showing all invoices and payments between 01/01/2023 and 10/10/2023

Date	Reference No	Type	Location	Payment Status	Debit	Credit	Balance	Payment Method	Others
01/01/2023 00:00		Opening Balance			\$ 770.00		\$ 770.00 CR		
01/05/2023 10:10	P-000001	Bill	Arizone Shop	Paid	\$ 1,000.00		\$ 6,470.00 CR		
01/05/2023 04:11		Ledger discount			\$ 0.00		\$ 6,470.00 CR		

NOTES

NOTE 1: This discount can only be added by the admin and not by other users.

NOTE 2: Also, the Ledger Discount is different from the Sale Discount.

While adding a Ledger Discount it will not be reflected in Sale Discount because the invoice details are not added for the ledger discount. And it is not possible to find to which invoice the discount is added.

Contacts Management (Supplier & Customers)

Any contact can be supplier, Customer or Both (Supplier & Customers)

Adding Suppliers & Customers

Add a new contact Select the contact type. Optional field, if not entered contact id will be autogenerated

Contact type:*	Contact ID:	Business Name:*
<input type="button" value="Suppliers"/> Suppliers	<input type="button" value="Contact ID"/> Contact ID	<input type="button" value="Business Name"/> Business Name
Prefix:	First Name:*	Middle name:
Mr / Mrs / Miss	First Name	Middle name
Mobile:*	Alternate contact number:	Landline:
<input type="button" value="Mobile"/> Mobile	<input type="button" value="Alternate contact number"/> Alternate contact number	<input type="button" value="Landline"/> Landline
Email:		
<input type="button" value="Email"/> Email		
Date of birth:		
<input type="button" value="Date of birth"/> Date of birth		
More Informations ▾		
Click this to see more field		
<input type="button" value="Save"/> Save		<input type="button" value="Close"/> Close

Any previous balance with the contact before using UltimatePOS

Tax number:	Opening Balance:	Pay term: i																
<input type="button" value="Tax number"/> Tax number	<input type="button" value="0"/> 0	<input type="button" value="Pay term"/> Please Select																
<div style="border: 2px solid red; padding: 10px;"> <table border="1"> <tr> <td colspan="2">Address line 1:</td> <td colspan="2">Address line 2:</td> </tr> <tr> <td colspan="2">Address line 1 Billing address details</td> <td colspan="2">Address line 2</td> </tr> <tr> <td>City:</td> <td>State:</td> <td>Country:</td> <td>Zip Code:</td> </tr> <tr> <td><input type="button" value="City"/> City</td> <td><input type="button" value="State"/> State</td> <td><input type="button" value="Country"/> Country</td> <td><input type="button" value="Zip/Postal Code"/> Zip/Postal Code</td> </tr> </table> </div>			Address line 1:		Address line 2:		Address line 1 Billing address details		Address line 2		City:	State:	Country:	Zip Code:	<input type="button" value="City"/> City	<input type="button" value="State"/> State	<input type="button" value="Country"/> Country	<input type="button" value="Zip/Postal Code"/> Zip/Postal Code
Address line 1:		Address line 2:																
Address line 1 Billing address details		Address line 2																
City:	State:	Country:	Zip Code:															
<input type="button" value="City"/> City	<input type="button" value="State"/> State	<input type="button" value="Country"/> Country	<input type="button" value="Zip/Postal Code"/> Zip/Postal Code															
Custom Field 1:	Custom Field 2:	Custom Field 3:	Custom Field 4:															
<input type="button" value="Custom Field 1"/> Custom Field 1	<input type="button" value="Custom Field 2"/> Custom Field 2	<input type="button" value="Custom Field 3"/> Custom Field 3	<input type="button" value="Custom Field 4"/> Custom Field 4															
<div style="border: 1px solid blue; padding: 10px;"> <table border="1"> <tr> <td>Shipping Address</td> <td>Shipping address</td> </tr> <tr> <td colspan="2">Search address</td> </tr> </table> </div>				Shipping Address	Shipping address	Search address												
Shipping Address	Shipping address																	
Search address																		
<input type="button" value="Save"/> Save <input type="button" value="Close"/> Close																		

1. Go to Contacts -> Suppliers or Customer
2. Click on add new contact. Select contact type – Supplier/Customer/Both
3. Based on the contact type selected – it will show the relevant fields. Fill the relevant details.
4. Click on More Information button to see more field.
5. **Pay Terms:** This will help the system to notify you of any pending payments for suppliers & customers. You can specify pay term in either days or months.
6. **Customer Group:** Read details here.
7. **Credit Limit:** This is the maximum amount of credit that can be given to the customer. If in any sales the credit exceeds this amount then it won't allow selling on credit.
8. **Opening Balance:** Opening balance of a customer or supplier before you start using SMARTBMS ERP. So, if there is any previous balance you can add here.
9. **Advance balance:** Sometimes customer/supplier pay/takes money in advance. This will show the amount of advance balance paid or take by the customer/supplier respectively.

Viewing Suppliers & Customers

1. To view details about a Supplier or Customer click on View button. It will show the complete details along with the relevant transactions (Purchases & Sales) for that contact.
2. **Pay Due amount:** You can use this button to pay the due amount for a customer or supplier. This will pay the overall due amount for all invoices.

When adding the user check the label “assign to specific contact”.

Now when adding contact select the user to whom you want to assign.

Credit Limit for Customer

Credit limits can be added to customers.

When the credit limit is reached the partial or credit sale can't be done for those customers.

To set the credit limit Go to Contacts > Customers > Action > Edit > More Information > Credit Limit.

Set this field blank for not having any credit limit for customers

 **NOTE:** Do not set the credit limit as 0 for having no credit limit.

Credit Limit = 0 (the credit for the customer is 0)

Credit Limit = blank (no restriction for credit limit(infinite))

Advanced Balance

Advanced balance (to customers) is the sum of the amount that the business should pay for the customers.

Advanced balance (to suppliers) is the sum of the amount that the suppliers should pay for the business.

To add an advanced balance, Go to **Customers -> customers/suppliers** and click on the action button. Here you will find a pay option and click on it. Add payment pop up will be shown and add the required amount value and click on save button.

Customer Groups

Import Contacts

Products

Purchases

Sell

Stock Transfers

Stock Adjustment

Expenses

Payment Accounts

Accounting

Reports

Administer Backup

Notification Templates

Settings

CRM

Asset Management

HRM

Essentials

All your Suppliers

Show 500 entries

Export to CSV Export to Excel Print Column visibility Export to PDF

Search ...

Add

action	Contact ID	Business Name	Name	Email	Tax number	Pay term	Opening Balance	Advance	Added On	Address	M
Actions	COS0380	Y & J PHARMACEUTICALS CO...LTD.		yjtroo@hotmail.com			₦ 0.00	₦ 0.00	31-08-2023		
Actions	COS0379	WAHL HAIR & CARE LTD		hairandcareghana@gmail.com			₦ 0.00	₦ 0.00	30-08-2023		
		ENOGA COMPANY LTD					₦ 0.00	₦ 0.00	25-08-2023		
		NDYFAITH HARMACY		ANDYFAITH@YAHOO.COM			₦ 0.00	₦ 0.00	21-08-2023		
		BUAKWA HARMACY LTD APL					₦ 0.00	₦ 290.00	19-08-2023		
		AMIK PHARMACY	YAMIK PHARMA			1 Days	₦ 0.00	₦ 0.00	15-08-2023		
Actions	C00370	VERNA					₦ 0.00	₦ 0.00	08-08-2023		
Actions	CO0369	TIER 2		inactive			₦ 0.00	₦ 388.10	08-08-2023		

Add payment

Supplier: Business: WAHL HAIR & CARE LTD

Total Purchase: ₦ 9,900.00
Total Paid: ₦ 0.00
Total Purchase Due: ₦ 9,900.00
Opening Balance: ₦ 0.00
Opening Balance Due: ₦ 0.00

Payment Method: * Cash

Paid on: * 21-03-2024 07:58

Amount: * ₦ 9,900.00

Attach Document: Choose File No file chosen

Payment Account: QUEENSTREET PHARMACY

Allowed File: .pdf, .csv, .zip, .doc, .docx, .jpeg, .jpg, .png

Payment Note:

Save Close

Making sales/ purchase using advanced balance:

To make a purchase or sale using this advanced balance, add a sale or purchase. Select the customer/supplier that you have added advanced balance. While making the payment select the advance option and save it.

Opening Balance

Opening Balance

Opening balance (to customers) is the sum of the amount that the customers have to pay for the business.

Opening balance (to suppliers) is the sum of the amount that the business has to pay for the suppliers.

Adding an opening balance

To add an opening balance, Go to **Contacts->customers/suppliers**. Either select the add button or click on edit for an existing user. There you could find a more information button, click on that and add the opening balance amount to be added for that user.

Loyalty Cards

Bottom of Form

Enabling Reward Points:

Before diving into Loyalty Cards, make sure you've enabled the reward points feature. You can find detailed instructions in our documentation.

Creating Loyalty Cards for Customers:

Once your reward points are active, follow these straightforward steps to set up Loyalty Cards for your customers:

1. **Assign a Customer ID:** When adding a new customer, make sure to provide them with a unique Customer ID. This ID will serve as their key to unlocking exclusive benefits.
2. **Printing the Loyalty Card:** Using the assigned Customer ID, print the Loyalty Card. This card is your customer's ticket to accumulating and redeeming reward points. You need to design & print the card externally (maybe use canvas or other designing software to design the card for printing.)
3. **Using Loyalty Cards at the Point of Sale (POS):**
 1. **Select Customer:** Begin by selecting the customer making the purchase. You can scan the QR/barcode code on their Loyalty Card or enter the customer's mobile number or enter the customer's name to associate the sale with their account.
 2. **Complete the Sale:** The system will automatically link the sale to the customer's Loyalty Card, ensuring they receive the deserved reward points.

That's it! You've successfully integrated Loyalty Cards into your SMARTBMS ERP system. Your customers can now enjoy a personalized and rewarding shopping experience.

Customer Groups:

With customer Groups, you can classify a customer as Retail Customers, Wholesale Customer, Friends, Colleagues and whatever you will love to...

1. To add a “Customer Group” go to Contacts -> Customer Groups & Click on “Add” button.
2. It will show a popup asking for customer group name & Calculation Percentage. Calculation percentage is used to calculate selling price.

Example:

- Suppose if the Selling Price set for a product Product1 is \$200
- Customer Group Name = Friend
- Calculation Percentage = -20
- **Note:** -20 (notice a minus sign) or you may set it 20 = +20%
- And you have created a customer with Harry with Customer Group assigned as Friend.
- Now go to pos or Sell screen. Select the customer Harry and add the product1.
- You will notice that the selling price set for the product1 will be $200 - 20\% = \$160$

This is how customer Group works.

Customer Group does an internal calculation and applied the calculation percentage to the selling price. It will not show a separate discount on the invoice or the pos screen.

This feature is highly useful when you have retail, wholesale or different customer categories.

You can view report for different customer group from “Customer Groups Report” or in other terms if you have retail and wholesale customer group you can see which type of customer group is giving more sale.

4. Products Management:

Adding Products

1. Go to – Products > Add Products.

- o Provide a Product Name,
Brand,
Units,
Category
Sub-category
- SKU: Add a unique SKU which will be used to identify the product & Print barcode in labels. Leave it empty to auto-generate it. You can also add a Prefix for auto-generated SKU.
- o **Steps to change the default SKU length:**

Barcode Type: Select a barcode type, default/recommended is C128 option. We recommend changing if only if the product added already have an SKU number for it.

Not For Selling: If a product is marked not-for-selling then it will not be displayed in POS or sales screen. This can be useful when using manufacturing module to make the ingredients as product not-for-selling also if you want to temporary disable selling for some products.

Alert Quantity: Alert quantity is used to alert when remaining stocks reaches to this level or below it.

Manage stock: Enable/Disable stockmanagement at a product level. Product stock management is not required for services like Repairing, Hair Cutting, Web Development Printing. For items with Manage Stock Unchecked (disabled), you can sell them in unlimited quantities. [Selling of service using SMARTBMS ERP](#)

2. **Business Location:** Select the business location(s) where this product can be sold or purchased.
3. Select Applicable tax for that product. Adding Tax
4. **Product Type:**

Single Product:

1.

1. Applicable for products with no variation with them then select single
2. When selecting Single product – You will need to enter the Default product price including/excluding tax, Profit Margin % (you can set default profit margin from settings -> Business Settings; this will help to type % every time). Based on the

profit margin it will auto calculate selling price excluding of Tax. You can also enter the selling price manually and it will auto adjust the profit margin for you.

Variable

Product:

Product Type:*

Variable Select type as variable

Add Variation:*

Enter different SKU for each variation

Select the variation

Variation	Variation Values								
Size (Tshirts)	SKU	Value	Default Purchase Price	Exc. tax	Inc. tax	x Margin(%)	Default Selling Price	Exc. Tax	Variation Images
S	S	Exc.	Inc.	25	Exc. tax	Choose Files	No file chosen		
M	M	Exc.	Inc.	25	Exc. tax	Choose Files	No file chosen		
L	L	Exc.	Inc.	25	Exc. tax	Choose Files	No file chosen		
XL	XL	Exc.	Inc.	25	Exc. tax	Choose Files	No file chosen		

1. Applicable to a product having variations (like size or color or design or flavors etc.) You can define variation templates from Products -> Variations. The advantage of creating variation is that it saves time to add same variations multiple times.
2. When selecting Variable product – It will display different fields to add all variations and its related Purchase price, Selling Price. You have to select the variations from the dropdown and it will auto-populate the variations for that template. You can change the variable name, Variation values.

3. To give same purchase price or selling price or profit for all variations of a product click on the double tick present in the first variation.

Add Variation: * [+](#)

Click on this icons to give same value for all variations

Variation	Variation Values									
	SKU i	Value	Default Purchase Price Exc. tax	Inc. tax	x Margin(%)	Default Selling Price Exc. Tax	Variation Images			
Waist Size (Jeans)		28	1.00	1.00	<input checked="" type="checkbox"/>	25	<input checked="" type="checkbox"/>	1.25	Choose Files No file chosen	-
		30	1.00	1.00	<input checked="" type="checkbox"/>	25	<input checked="" type="checkbox"/>	1.25	Choose Files No file chosen	-
		32	1.00	1.00	<input checked="" type="checkbox"/>	25	<input checked="" type="checkbox"/>	1.25	Choose Files No file chosen	-
		34	1.00	1.00	<input checked="" type="checkbox"/>	25	<input checked="" type="checkbox"/>	1.25	Choose Files No file chosen	-
		36	1.00	1.00	<input checked="" type="checkbox"/>	25	<input checked="" type="checkbox"/>	1.25	Choose Files No file chosen	-

4. Read more about [adding variations](#)

Combo or Bundle Product

Product Type: * [i](#)

Combo

→
Select type as Combo

🔍

→
Search & add products

Product Name	Quantity	Purchase Price (Excluding Tax)	Total Amount (Exc. Tax)	
Levis Men's Slimmy Fit Jeans (28) - AS0002-1	1.00 Pieces	\$ 70.00	\$ 70.00	-
Levis Men's Slimmy Fit Jeans (34) - AS0002-4	1.00 Pieces	\$ 72.00	\$ 72.00	-
	Net Total Amount :		\$ 142.00	

→
Enter quantity which will be present in unit quantity of the product

x Margin(%):

Default Selling Price:

Adding a bundle product

1. Combo product are also called bundle products.
2. It is offering several products as one combined product. For example a product “Computer Set” can have: 1 PC Monitor + 1 PC CPU + 1 Pc Keyboard + 1 PC + 1 PC mouse So when someone buys Computer set, she gets all the products in it.
3. Stock of bundled product depends on stock of individual products present in that bundle. Example: if you have 5 PC Monitor, 4 PC CPU, 10 pc Keyboard, 50 PC mouse, the stock of Computer set will be 4 PC.

4. When the bundle product is sold, stock of all products inside them is automatically deducted.
5. Individual products present in bundle product can also be sold separately.
6. Bundle products cannot be purchased, only individual products present in it can be purchased.

Click on Save.

You can edit a product. You can also Copy / Export to CSV, PDF or Excel file.

Adding Products with multiple variations:

If you have products which involve multiple variations like for example a Shirt can have Color & Size variation, then we have multiple ways to work with it:

Solution 1, Create combined variation: Can a variation with a name “Color-Size” and add values like Red-Small, Red-Medium, Red-Large, etc., this can be used for while adding the Shirt.

Solution 2, Create multiple Products: Create multiple different products like Shirt-Red, Shirt-Green, Shirt-Blue with size as variations. When you create multiple products, you will NOT have to enter the same details multiple times, first, add the Shirt-Red with all size variations of it and then use the **Duplicate Product** action to copy the data.

Select Required variations:

While adding variable products, you can select only the required variation values.

In your add/edit product screen, select the **product type** as ‘**variation**’ and select the **variation name (e.g., color)**.

A dropdown will be displayed, in which you can select the required variation values.

Applicable Tax:

Selling Price Tax Type:

Product Type: **Variable**

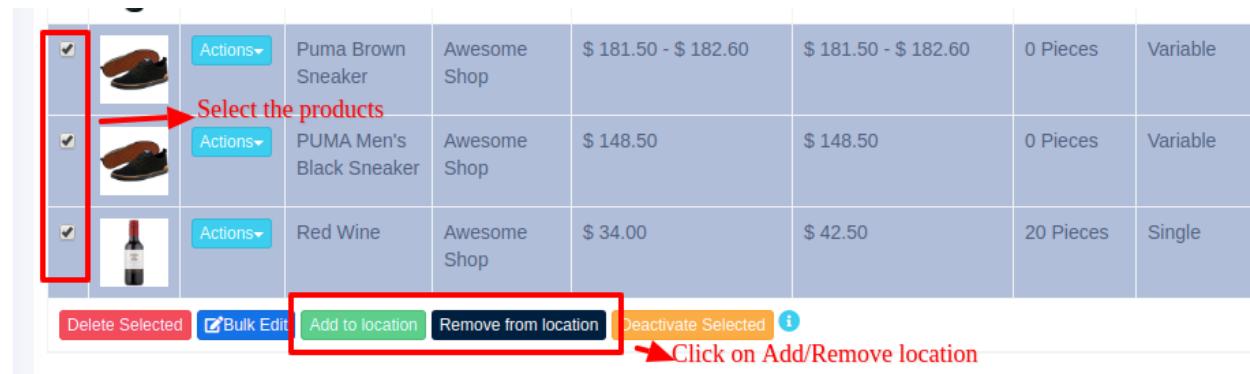
Add Variation: **1**

Location	Location Values
Select Location	<input type="text" value="64.00"/> <input type="button" value="Delete"/> <input type="button" value="Edit"/>
Select Location Values	<input type="text" value="64.00"/> <input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="text" value="128.00"/> <input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="text" value="32.00"/> <input type="button" value="Delete"/> <input type="button" value="Edit"/>

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Assigning/remove locations of multiple products at once:

Go to List Products and refer to this screenshot.



<input checked="" type="checkbox"/>		<input type="button" value="Actions"/>	Puma Brown Sneaker	Awesome Shop	\$ 181.50 - \$ 182.60	\$ 181.50 - \$ 182.60	0 Pieces	Variable
<input checked="" type="checkbox"/>		<input type="button" value="Actions"/>	PUMA Men's Black Sneaker	Awesome Shop	\$ 148.50	\$ 148.50	0 Pieces	Variable
<input checked="" type="checkbox"/>		<input type="button" value="Actions"/>	Red Wine	Awesome Shop	\$ 34.00	\$ 42.50	20 Pieces	Single

i

Click on Add/Remove location

Deactivating & Activating Product:

Refer to the screenshot.

Actions	Product Name	Shop	Min Price	Max Price	Stock
<input checked="" type="checkbox"/>	Puma Brown Sneaker	Awesome Shop	\$ 181.50 - \$ 182.60	\$ 181.50 - \$ 182.60	0 Piece
<input checked="" type="checkbox"/>	PUMA Men's Black Sneaker	Awesome Shop	\$ 148.50	\$ 148.50	0 Piece
<input checked="" type="checkbox"/>	Red Wine	Awesome Shop	\$ 34.00	\$ 42.50	20 Piece

[Delete Selected](#) [Bulk Edit](#) [Add to location](#) [Remove from location](#) [Deactivate Selected](#) [Click here to deactivate](#)

Using Product barcode:

Question:

How can we use the product's barcode instead of creating and printing new for every product?
How can we use the brand's barcode of the product instead of creating and printing new for every product?

Answer:

When creating a product, in the SKU field enter the barcode number of the product. This barcode will be used to identify the product in all screens like POS, Sales, purchases, reports, and others.

How to add a product that already has a Barcode?

Adding products that already have a barcode, follow the same steps as adding any other products.

1. Go to add products
2. Fill in all the product details
3. **IMPORTANT:** in the SKU field scan or enter the barcode of the product.

Adding product quantity or adding product stock

For systematically managing your business, product quantities can be added in 3 ways:

1. Adding Opening stock
2. Adding purchases
3. Manufacturing product: Useful for manufacturers, required manufacturing module.

Variations

1. Variations can be added from the **Products -> Variation's** menu.
2. These variations are used in variable products product.

Example of variation is, for example, Jeans can have multiple colors, so add variations called Colors and provide the value for it. As given in the image below.

25

Variation Name:* Color

Add variation values:* Black

Blue

Brown

Grey

Gold

Gray

White

Update **Close**

Click here to add more variation values

NOTE: Delete variation option will not be shown for variations that are already used in some products

Adding Multiple Variations for Products

If a product has more than one variation, for example, A shirt with size 'M' and brand 'POLO' or A book with pages 30 and size long.

Add the variation name and type as a combined variation.

E.g.: variation name: Size – Pages

variation values – Long -30, Long -120, Long – 200, Small -30, Small – 120 etc.

Product Units

Different Products have different units. SMARTBMS ERP allows you to add different units for products.

Adding Units

1. Go to Products -> Units
2. Give the unit's name, a short name, and choose if want the unit to allow decimals.

Example:

Name: Meter

Short name: Mtr.

Allow Decimal: Yes.

Allowing decimal allows you to purchase/Sell the product in decimal and vice-versa.

Multiple Units:

This can be useful if you purchase products in a different unit and sell it in a different unit.

For example: Purchase in dozens and sell in pieces.

Or purchase in boxes and sell in pieces.

Steps:

1. Add the lower unit from Add Unit Screen. For example, pieces.
2. Add the higher unit as per the screenshot:

- o Check “Add as multiple of another unit”

Add Unit

Name:*

Box

Short name:*

Box

Allow decimal:*

No

Add as multiple of other unit i Check this checkbox

1 Box = 100 Pieces (Pc(s))

Here it is specified: 1 Box = 100 Pieces

Save Close

- o Provide the conversion Details.

3. Use the unit in Add/Edit Product. While adding/editing purchase/ sale you can see the dropdown for units. Select the desired unit and it will change the unit purchase/sales price accordingly.

NOTE: You will not see the main Units (Dozen in this example) in the Add-Product Unit dropdown, select piece as the unit of product. All purchases/sales get saved in the lower unit (pieces in the above example). So, after adding purchases/sales if you edit the conversion details, it will affect the purchases/sales quantity accordingly.

Selecting relevant Sub Units for a product

For some products not all sub-units will be required. Suppose for example you sell Oranges only in Dozens or only in pieces then it will be useful.

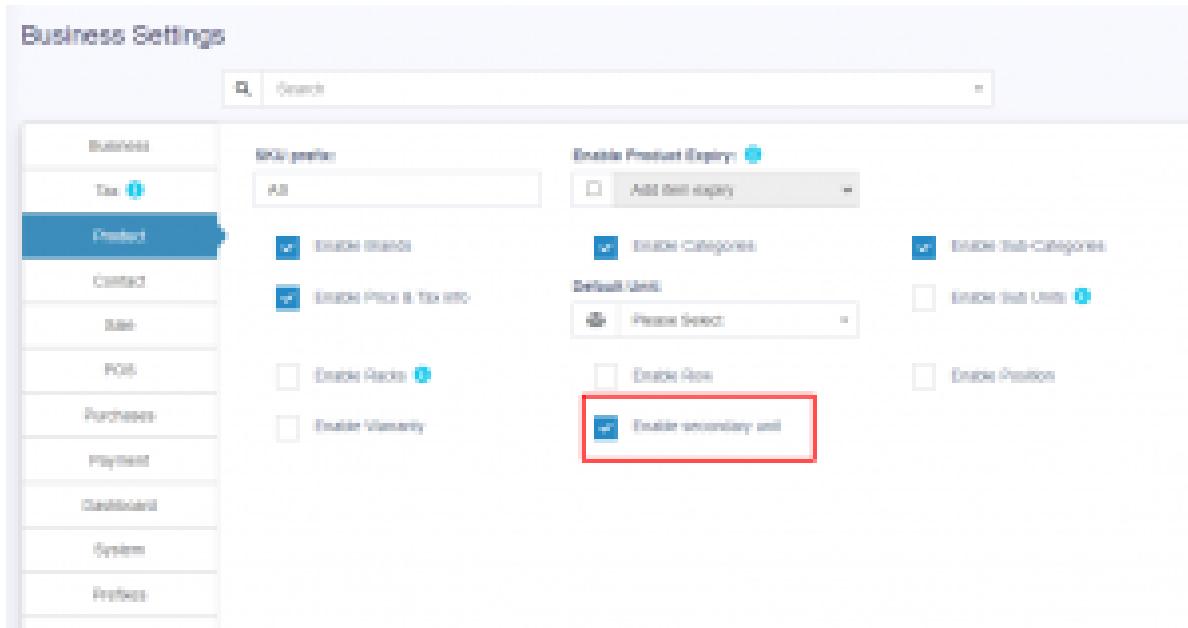
Enable it from Business settings ->Products -> Enable relevant sub-units

Now when adding products select the Unit for the products and it will give option to select multiple applicable sub-units. Selecting the sub-units will allow you to do purchases or sales on this selected sub-units.

Secondary Units:

Secondary units can be added to products. A secondary unit can be used if a particular product's subunit may vary each time. For example, 1 piece of stone can be 10 kg or 20 kg, or 30 kg.

To enable this, go to Settings-> Business Settings –> Products.



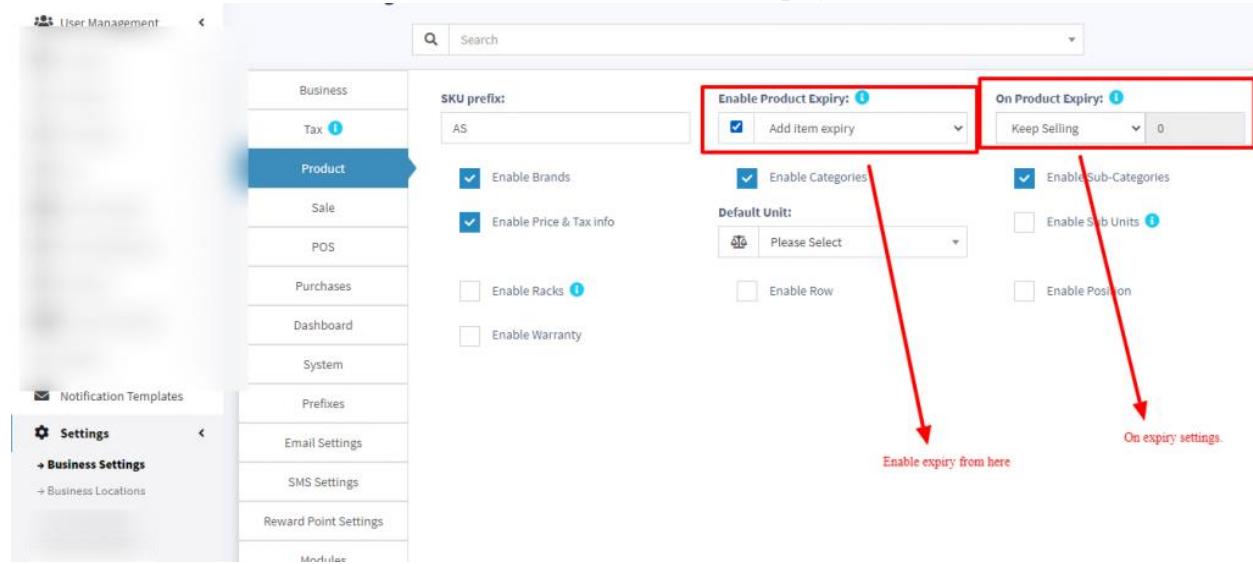
On enabling this, a secondary unit label will be shown in add/edit products screen.

Product expiry and related settings.

Enabling expiry for products

1. To enable expiry go to **Settings -> Business Settings -> Product section**. And check the “Enable Product Expiry” checkbox.

2. On enabling Product expiry, you can choose either “Add Item Expiry” or “Add manufacturing date & Expiry Period”



- “**Add Item expiry**” => Choose this option if you want to directly add the expiry of the item to the purchase screen.
- “**Add manufacturing date & Expiry date**” => Choose this option if you want to add the manufacturing date of the item and the expiry period. Based on the manufacturing date and expiry period it will auto-calculate the expiry date. And this expiry date can be edited. You will have to add expiry period for the product in the “Add or Edit Product” screen. And the manufacturing date in the “Add Purchase” screen.

3. “**On Product Expiry**” => With this option you can set what the system should do when a product expired.

- “**Keep Selling**” => Choose this option if you want the application to keep selling the product even after expiry.
- “**Stop Selling n days before**” => Choose this option to stop selling the item n days before the expiry. You will have to specify the value of n (which is the number of days before to stop selling)

4 "Stock Accounting Method" is a crucial feature that determines how products are sold and accounted for. There are two primary methods:

FIFO (First In First Out): Under this method, older stock is sold before newer stock.

LIFO (Last In First Out): Here, the most recently purchased stock is sold first.

For example:

On March 20, 2018, 20 pieces of product A were purchased with an expiry date of April 10, 2018. On March 23, 2018, another 20 pieces of the same product were purchased, with an expiry date of April 8, 2018.

Today, 22 pieces were sold.

If the "Stock Accounting Method" is FIFO, then the product purchased on March 20, 2018, will be deducted by 20 pieces first, and then the product purchased on March 23, 2018, will be deducted by 2 pieces. Thus, in stock, there will be products from March 23, 2018, with 18 pieces remaining. If the "Stock Accounting Method" is LIFO, the opposite will occur.

Note: You must set the required accounting method before selling the item for that method to be used.

Stock Expiry Report:

Navigate to Reports => Stock Expiry Reports.

Here, you can filter stock by category, brands, and stock expiry date.

Click on "Edit" to modify the remaining stock and expiry period.

If the remaining stock is decreased, the unit purchase price is adjusted accordingly.

Stock Expiry Alert:

Stock expiry alerts can be viewed in the bottom section of the homepage. It displays a list of products expiring soon.

You can set the number of days before which the expiry alert should be shown on the homepage from "Settings -> Business Settings -> Dashboard Section" under the "View Stock Expiry Alert For" input field.

Displaying product expiry date in the invoice:

Ensure that the product expiry feature is enabled as mentioned above.

Go to the invoice layout and enable "Show Product Expiry."

If the product expiry date is added during purchase or when adding opening stock, it will display the product expiry dropdown during sales. Select the expiry date you want to sell. Then, in the printed invoice, the expiry date will be shown.

Edit Product

Product Name:	iPhone 12	Barcode Type:
Apple iPhone 12	Barcode	Code 128 (1D)
Unit:	Product	Brand:
iPhone iPhone	Product	Apple
Category:	Electronics	Business Location:
Electronics	Electronics	Associate Map
<input checked="" type="checkbox"/> Manage Stock	Alert quantity:	Device Model:
Manage stock management at product level	1000.00	iPhone 12
<h4>Product Description</h4> <div style="border: 1px solid #ccc; padding: 5px; height: 100px; overflow: auto;"> My favorite file last view menu format tools Task Help </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>Font Size: <input type="button" value="A-"/> <input type="button" value="A+"/> Paragraph: <input type="button" value="B"/> <input type="button" value="I"/> <input type="button" value="U"/> <input type="button" value="H1"/> <input type="button" value="H2"/> <input type="button" value="H3"/> <input type="button" value="H4"/> <input type="button" value="H5"/> <input type="button" value="H6"/> <input type="button" value="H7"/> <input type="button" value="H8"/> <input type="button" value="H9"/> <input type="button" value="H10"/> <input type="button" value="H11"/> <input type="button" value="H12"/> <input type="button" value="H13"/> <input type="button" value="H14"/> <input type="button" value="H15"/> <input type="button" value="H16"/> <input 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Selecting a product in the purchase/sale/POS screen will also display the secondary unit label. Details regarding secondary units for products are available in the product stock history.

Note: The secondary unit is not involved in calculations; it is solely for tracking products with varying subunits.

Enabling Lot Number:

To enable lot numbers:

Go to Settings -> Business Settings -> Purchases.

Check the "Enable Lot Number" checkbox and save the settings.

Adding Lot Numbers in Purchases:

If lot numbers are enabled:

When adding purchase stock, the lot number field will appear for entering the lot number.

Adding Lot Numbers in Opening Stock:

If lot numbers are enabled:

When adding opening stock, an input field will be displayed for entering the lot number.

Selling Products from Specific Lots:

You can select specific lot numbers when selling products.

Displaying Product Lot Numbers in the Invoice:

Ensure that the lot number feature is enabled as described above.

Go to the invoice layout and enable "Show Lot Number."

If the lot number is added during purchase or when adding opening stock, it will be displayed during sales along with the product expiry dropdown. Select the lot number you wish to sell. The printed invoice will show the lot number.

5 Purchase Management

Adding Purchase

1. Go to – Purchases -> Add Purchases
2. Type Supplier Name or Business name in the Supplier field. If the supplier doesn't exist you must add them from Contacts -> Suppliers -> Add
3. Enter Purchase reference number, Purchase date & Order Status.
4. **Select Business Location:** Select a location where you want to add the purchase. You can add a new Location from Settings -> Business Locations.
5. Type product name or scan the product barcode number. It will show related matched products, select a product to add it to the purchase list.
6. On adding a new product, you can enter purchase quantity, purchase price, and tax information.
7. **To add a discount:** Select the discount type (fixed or percentage) and enter the amount. SMARTBMS ERP will auto-calculate the amount after discount.
8. Enter purchase tax, Shipping Details, Additional Shipping charges, Payment status, & Additional notes.

You can view the list of purchases from Purchases -> List Purchases.

You can Print Labels for your purchase by Clicking “Print Labels” in List Purchases screen.

No matching product found

This error will be displayed in 3 conditions:

1. **Reason 1:** There are no products matching the name or SKU which you have entered. Check it once in the list products.
2. **Reason 2:** Check the business location selected in add purchase have that product. So, if the business location is Location-1, then in add/edit product the product must be assigned to that location.
3. **Reason 3:** Make sure the product has **Stock-Management ENABLED** in Add/edit product. If stock management is not enabled in products, then it won't show in the add/edit purchase.

Purchase Payments

Bottom of Form

Purchase payment meaning paying to the supplier for the Purchases.

Payments Statuses

- Paid:** The PO is 100% paid.
- Due:** The PO is 100% not paid.
- Partial:** Partial amount of the PO has been paid.
- Overdue:** PO is 100% not paid & past the due date.
- Partial Overdue:** Partial amount of the PO has been unpaid & past the due date.

Action	Date	Reference No	Location	Supplier	Purchase Status	Payment Status	Grand Total	Payment due	Added By
Admin	11/03/2020 12:00	PO2018/0002	Awesome Shop	Jackson Hill	Received	Due	\$ 235,656.00	Purchase: \$ 235,656.00	Mr Admin
Admin	11/01/2020 12:00	PO2018/0001	Awesome Shop	Jackson Hill	Received	Due	\$ 5,180.00	Purchase: \$ 5,180.00	Mr Admin
Admin	10/27/2020 12:00	35001BCVD	Awesome Shop	Jackson Hill	Received	Due	\$ 12,100.00	Purchase: \$ 12,100.00	Mr Admin
Admin	10/19/2020 12:00	35001BCVX	Awesome Shop	Michael	Received	Paid	\$ 55,660.00	Purchase: \$ 0.00	Mr Admin
Admin	10/19/2020 12:00	35001BJGN	Awesome Shop	Mike McCubbin	Received	Paid	\$ 84,700.00	Purchase: \$ 0.00	Mr Admin
Admin	10/04/2020 12:00	35001BCVJ	Awesome Shop	Jackson Hill	Received	Partial	\$ 6,050.00	Purchase: \$ 3,050.00	Mr Admin
Admin	10/04/2020 12:00	35001BCVK	Awesome Shop	Jackson Hill	Received	Paid	\$ 2,000.00	Purchase: \$ 0.00	Mr Admin

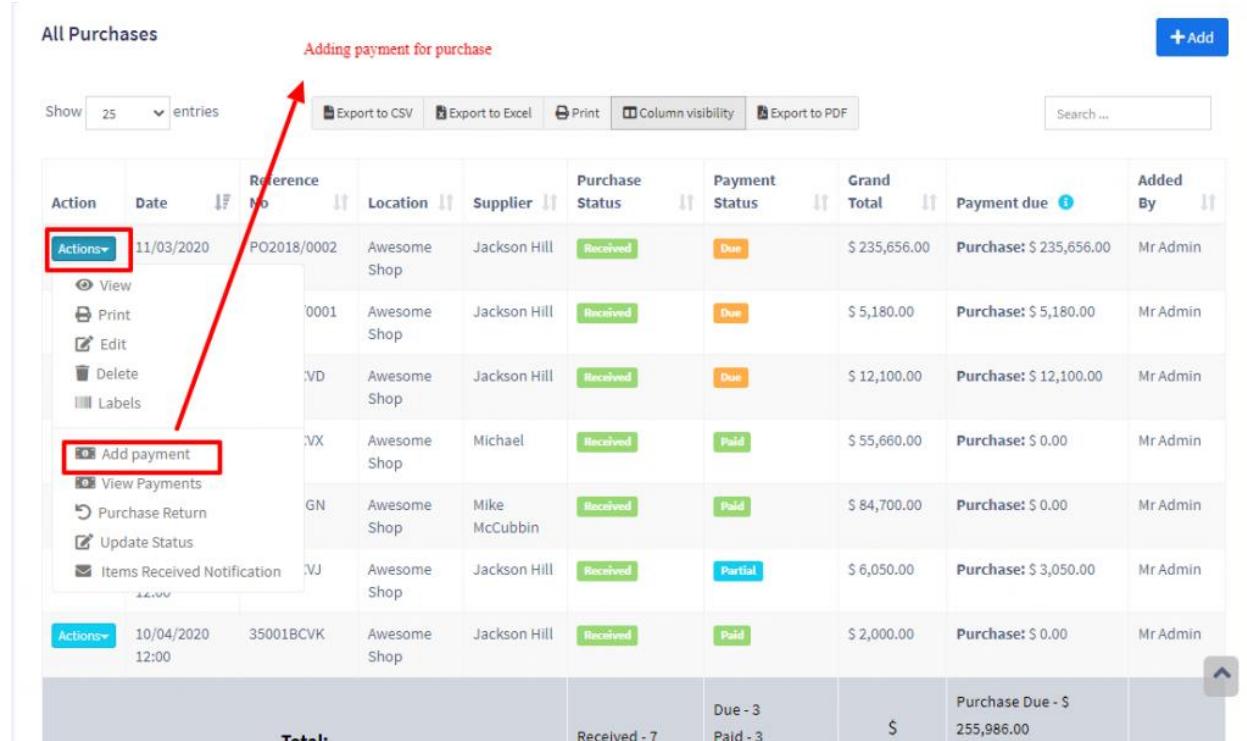
Adding Payments

Adding payment when adding purchase:

In the add purchase screen, you can add the payment for the purchase.

Adding payment from the List Purchase screen

In list purchase click the actions for any PO and it will display the list of actions for it. This option is not displayed if there is no payment due.

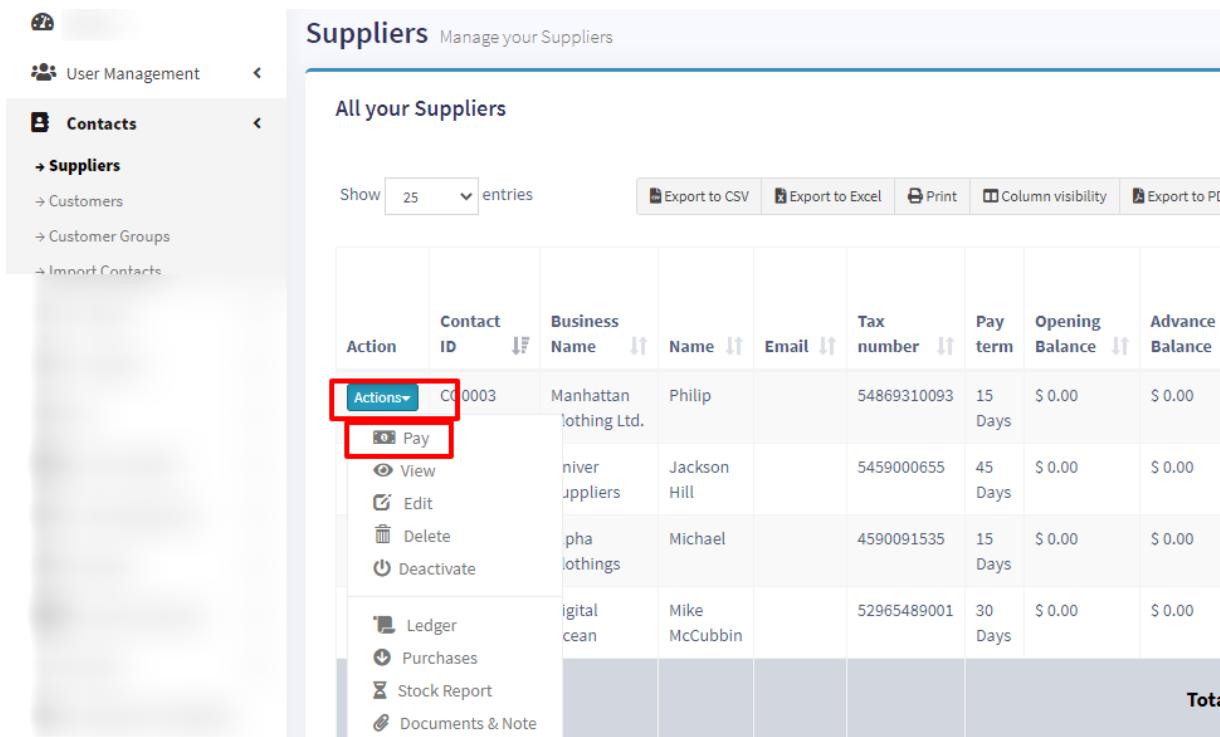


The screenshot shows the 'All Purchases' list screen. At the top, there is a red arrow pointing from the text 'Adding payment for purchase' to the 'Actions' dropdown menu for the first purchase row. The 'Actions' dropdown is open, showing options: View, Print, Edit, Delete, Labels, Add payment, View Payments, Purchase Return, Update Status, and Items Received Notification. The 'Add payment' option is highlighted with a red box. The main table lists purchase details such as Date, Reference No, Location, Supplier, Purchase Status, Payment Status, Grand Total, Payment due, and Added By. The first row has a 'Due' status and a 'Purchase: \$ 235,656.00' due amount. The last row has a 'Paid' status and a 'Purchase: \$ 0.00' due amount.

All Purchases										+ Add	
Adding payment for purchase											
Action	Date	Reference No	Location	Supplier	Purchase Status	Payment Status	Grand Total	Payment due	Added By		
Actions	11/03/2020	PO2018/0002	Awesome Shop	Jackson Hill	Received	Due	\$ 235,656.00	Purchase: \$ 235,656.00	Mr Admin		
View		'0001	Awesome Shop	Jackson Hill	Received	Due	\$ 5,180.00	Purchase: \$ 5,180.00	Mr Admin		
Print		'VD	Awesome Shop	Jackson Hill	Received	Due	\$ 12,100.00	Purchase: \$ 12,100.00	Mr Admin		
Edit		'VX	Awesome Shop	Michael	Received	Paid	\$ 55,660.00	Purchase: \$ 0.00	Mr Admin		
Delete		GN	Awesome Shop	Mike McCubbin	Received	Paid	\$ 84,700.00	Purchase: \$ 0.00	Mr Admin		
Labels		'VJ	Awesome Shop	Jackson Hill	Received	Partial	\$ 6,050.00	Purchase: \$ 3,050.00	Mr Admin		
Add payment		Actions	10/04/2020	35001BCVK	Awesome Shop	Jackson Hill	Received	Paid	\$ 2,000.00	Purchase: \$ 0.00	Mr Admin
							Received - 7	Due - 3 Paid - 3	\$	Purchase Due - \$ 255,986.00	

Adding payments from Contact

Go to contact -> Suppliers. Click on actions for the supplier and it will show "Pay Due amount", click on it and pay the amount. "Pay Due amount" this option is not displayed if there is no payment due.



The screenshot shows the 'Suppliers' management page. The left sidebar includes 'User Management', 'Contacts', and 'Suppliers' (selected). The main area displays a table of suppliers with columns for Action, Contact ID, Business Name, Name, Email, Tax number, Pay term, Opening Balance, and Advance Balance. A red box highlights the 'Actions' dropdown menu for the first supplier, which includes options like Pay, View, Edit, Delete, Deactivate, Ledger, Purchases, Stock Report, and Documents & Note. The table has 8 rows, with the last row being a summary.

Action	Contact ID	Business Name	Name	Email	Tax number	Pay term	Opening Balance	Advance Balance
Actions	CC0003	Manhattan Clothing Ltd.	Philip		54869310093	15 Days	\$ 0.00	\$ 0.00
		Never Suppliers	Jackson Hill		5459000655	45 Days	\$ 0.00	\$ 0.00
		Phantom Clothings	Michael		4590091535	15 Days	\$ 0.00	\$ 0.00
		Digital Clean	Mike McCubbin		52965489001	30 Days	\$ 0.00	\$ 0.00
								Total

Purchase Requisition

What is Purchase Requisition (PR)

The purchase requisition is a document that an employee creates to request a purchase of some products when the stock reaches a low level.

Only products less than the alert quantity will be shown while creating the purchase requisition.

Enabling Purchase Requisition

Go to Settings -> Business Settings -> Purchase and enable the purchase requisition check box.

The purchase requisition tab will be shown in the sidebar.

Click on add button and provide the required details. Refer to the screenshot below.

Navigation: Home > Purchasing > Purchase Requisition

Add Purchase Requisition

Search: Category: Business Location: Accounting

Select Item & Category List

Reference No: Required by date:

Click here to view products below

Product	Unit Quantity	Required Quantity	Unit	Print	Print
Smartphone X10 - Color: Black (1000)	<input type="text" value="100"/>	<input type="text"/>	PC	<input type="button" value="Print"/>	<input type="button" value="Print"/>
Smartphone X10 - Color: Black (1000)	<input type="text" value="100"/>	<input type="text"/>	PC	<input type="button" value="Print"/>	<input type="button" value="Print"/>

Converting Purchase Requisition to Purchase Order

Once PR is added it's converted to Purchase Order.

To convert it into a purchase order, follow the steps below.

Go to Purchase order -> Add. [Purchase order document

Partial Purchase

If the ordered quantity in the PR is reduced while converting it into a purchase order, then the status will automatically change from ordered to partial.

Purchase Order

What is a Purchase Order?

A purchase order is a document given by the buyer (usually you) to the supplier to request a purchase of goods.

A purchase order contains the buyer invoicing details, delivery details, products, quantities, pricing, tax, discounts, payment terms, payment details, shipping charges if any, and other notes.

The supplier will issue a sales order against the purchase order you have provided.

A purchase order has multiple statuses: Ordered, Partial, Completed

Enabling Purchase Order

To enable purchase Order, follow the below steps:

1. Go to Settings -> Business Settings
2. Purchase tab -> Enable Purchase Order
3. Save it.

Using Purchase Order in SMARTBMS ERP

Creating purchase order

After Enabling Purchase order, inside Purchase you'll find the Purchase -Order menu.

Go to add Purchase order, fill in all the details and save it.

Stocks are not added on issuing Purchase orders.

Once a Purchase order is created, you can print it and send it to the supplier.

Converting purchase Order to Purchase

On receiving Purchase orders, the supplier issues a sales or invoice.

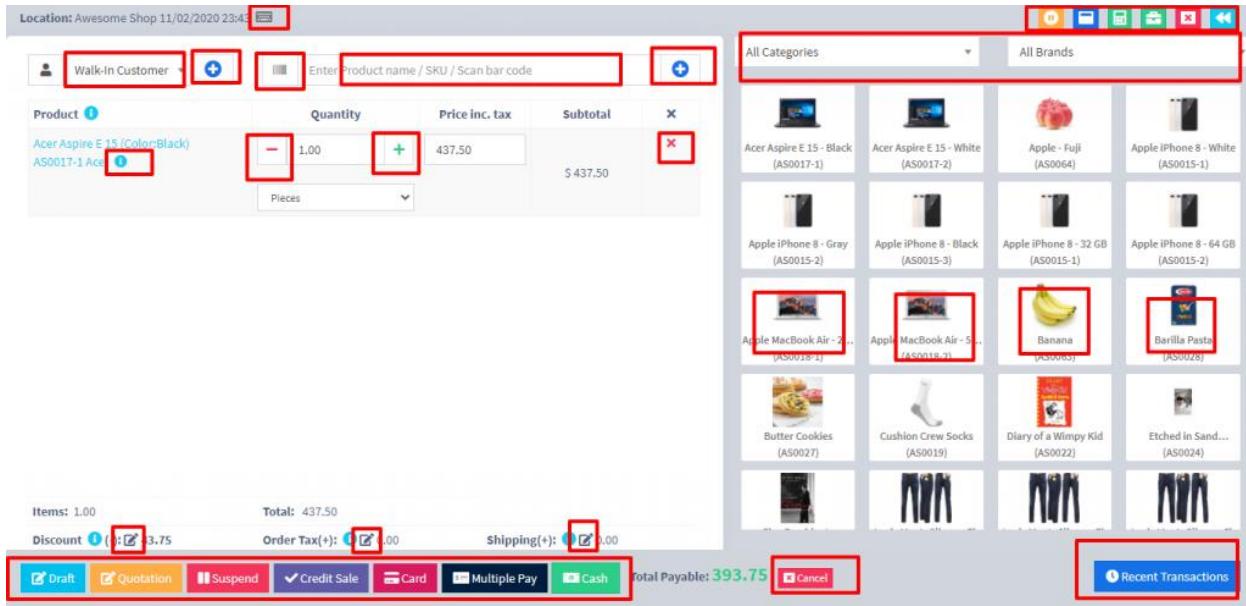
Add Purchase

Supplier: [*]	Reference No: [*]	Purchase Date: [*]	Purchase Status: [*]
<input type="button" value="Please Select"/> <input type="button" value="+"/>	<input type="text"/>	<input type="text" value="28-06-2021 12:47 PM"/>	<input type="button" value="Please Select"/>
Address:	Business Location: [*]	Pay term: [*]	Attach Document:
<input type="button" value="Please Select"/>	<input type="button" value="Pay term"/> <input type="button" value="Please Select"/>	<input type="button" value="Browse..."/>	
Purchase Order: <input type="text"/> <div style="color: red; margin-top: 5px;">first select supplier, then it will show list of all purchase orders for that supplier here</div>			

Max File size: 5MB
Allowed File: .pdf, .csv, .zip, .doc, .docx, .jpeg, .jpg, .png

1. Go to Purchase -> Add Purchase, select the supplier.
2. On Selecting it will populate the list of all Purchase orders related to the supplier on the “Purchase Order” dropdown.
3. Select the Purchase Order and it will auto load the products for that order with the product’s price, tax, discounts applied automatically as the sales order.
4. You can increase or decrease the quantity.
5. Save it and the status of the Purchase order will change automatically.

6.0 Selling (POS Screen), Credit Sales, Draft, Quotations & Suspended Sales.



Interactions points in POS Screen.

Selling Products, Changing Product Price, Tax & Discount, Lot number & Expiry

Go to – Sell -> POS

Selecting Customer:

By default, there is “Walk-In Customer”. You can search for a customer by name/customer id or phone number or can add new customer by clicking the plus (+) button “Add Customer”.

Searching & Adding Product:

Enter Product Name Or scan the barcode to search the product. If multiple products are matched then it displays the dropdown of products, selects the product from it. Or if there is a single product then it directly gets added to cart.

Changing Product Price, Tax & Discount for a product

- After the products get added, click on the product name to modify product price, tax & discounts.

NOTE: Option for different tax in products will be shown only if

The screenshot shows a POS software interface. At the top, it says 'Location: Awesome Shop 11/02/2020 23:43'. Below that is a search bar with 'Enter Product name / SKU / Scan bar code'. The main area shows a sales line item for an 'Acer Aspire E 15 (Color:Black) AS0017-1 Acer'. A red box highlights this line item, and a red arrow points from it to a tooltip. The tooltip text is: 'Clicking on the product name will open a popup where you can change the unit price, tax, discount of a product and add notes'. To the right of the line item, there are buttons for 'Quantity' (1.00), 'Price inc. tax' (\$437.50), 'Subtotal' (\$437.50), and 'X'. Below these buttons is a dropdown for 'Pieces'. To the right of the line item, there is a sidebar titled 'All Categories' with a grid of product thumbnails and names. The products shown are: Acer Aspire E 15 - Black (AS0017-1), Acer Aspire E 15 (AS0017-2), Apple iPhone 8 - Gray (AS0015-2), Apple iPhone 8 (AS0015-3), Apple MacBook Air - 2... (AS0018-1), Apple MacBook (AS0018-2), Butter Cookies, and Cushion Crew.

- **Inline tax** is enabled. You can enable it from Business Settings -> Tax ->Enable Inline Tax in purchase and sell

Selecting Lot number for a product

- If lot number is enabled then it will show the option to select lot number. (Enabling Lot number)

Selecting Expiry for a product

- **Expiry Date:** If the expiry date is enabled then it will show the option to select lot number. (Enabling expiry)

Cancel Sales:

To cancel the sales click on the cancel button. Cancel invoices are not saved in the system, so no stock will be deducted.

To finalize the invoice, click on Finalize – Add the payment options and save it.

On save it will display an invoice printing option.

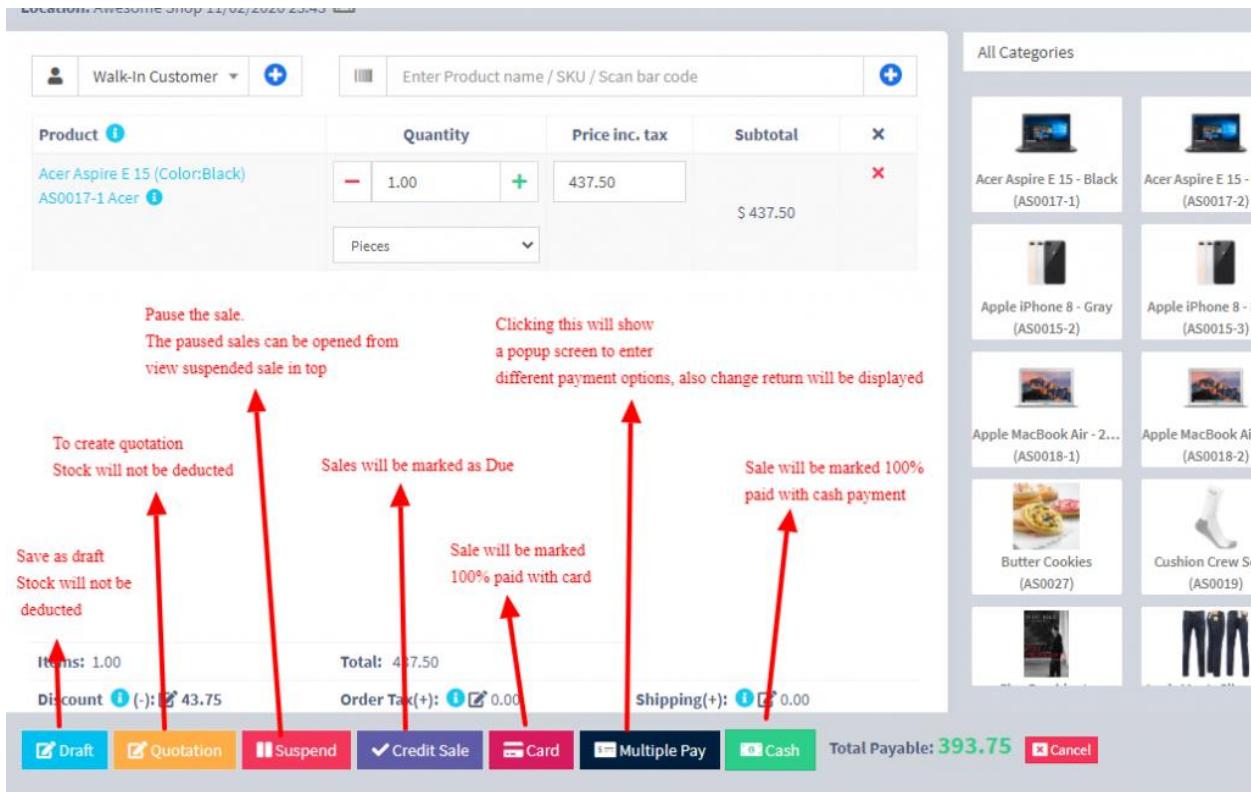
NOTE: For invoice to print correctly – The Margins options should be set to “Default”.

List of sales can be viewed from Sell -> List Sales.

List of drafts can be viewed from Sell -> Drafts.

Both Sell & Drafts can be edited to make any changes.

Express Checkout: Express Checkout means the sale will be marked as Paid and the payment method will be cash. No separate payment screen will be displayed. Printing of invoice depends on the business location settings.



100% Credit Sales

- To sell on credit to the customer you first need to enable this button by going to **Settings -> Business Settings -> POS -> Show Credit Sale Button**
- Then on the POS screen, you will be able to see a button “Credit Sale”, simply click this button to make sales on credit.

Half Credit & half payment Sales:

Suppose invoice amount is \$1000, customers pay \$700 cash and \$300 is credit amount on him, then follow these steps:

- Click on multiple pay button
- Select the payment method and enter the amount paid by the customer. (\$700 in our example)
- Click finalize payment.
- Now, the pending amount is automatically added as credit amount on him (or amount to be taken from the customer)

Previous sale amount in Sales:

If a sale is made for the customer for a subsequent time for the same product, the previous amount in which the product is sold will be shown for reference in add sale screen.

Customer: Harry (C0000001)  Pay Term: 10 Date Due: 2023-09-06

Address Book: Harry (C0000001)  

Shipping Address: Harry (C0000001)
123 Main Street
Phoenix, AZ 85001 USA

Shipping Address: Harry (C0000001)
123 Main Street
Phoenix, AZ 85001 USA

Master:    

Invoice No.:    

Print Label:    

Print Label:    

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This feature can also be used for purchase of same products from a supplier.

NOTE: This feature is available in version 4.7.8 and above

Draft & Quotation

This is useful if you want to create a quotation before sales.

Marking a sale as Draft or Quotations will not deduct the available stock.

You can view all Quotations & Drafts from List Quotation or List Draft respectively. Existing draft/Quotation can be edited to make it as final sales.

Convert Draft/Quotation to Sale invoice

To convert a draft/quotation to sale invoice, follow the steps below

Go to List draft / List quotation. Click on the action button.

Select edit in the dropdown.

Change the status from draft/Quotation to Final and save it.

Copy Quotation

Quotations can be copied or duplicated.

Go to Sale > List Quotations > Actions > Copy Quotation



Suspended Sales

Suspend Sales means unfinished sale or hold Sale.

Suspended sales stock gets deducted from available stock. You can view all suspended sales by clicking on the Yellow Color button present in very top right of screen (above the date).

Some Use Case of Suspended sales

In a grocery store, if you have suspended button, you can suspend particular customers sales and entertain another customer, when his comeback you can proceed with his sale.

In Restaurant, you can suspend the order of customers if not yet paid, and finish it when they finish eating and paid their order, so you can proceed to final sales. You can put Table 1, Table 2, Table 3... so when they finish it's easy to identify table 3 going to pay.

In hotel lots of customers check in stay for 2 nights and order some foods and customers say, just charge to room 024. So, you can suspend their orders and edit if there is some additional order and suspend again. Until final it when they pay their bills. on Hotel, on Reference Number: Room 009, Room 012

Card / Multiple Pay / Cash

Multiple Pay: Used when the customer wants to pay with different payment methods like some amount by card, some by cash and some other payment methods. This option is also used when the customer doesn't pay the exact tender amount and you need to calculate the Return Change.

Card: Used when the customer wants to pay the complete invoice by card.

Cash: Used when customer pay the exact amount of invoice by cash. If the customer pays less or more amount then the invoice amount then use Multiple Pay to get change return.

Adding payments from Contact

Go to contact -> Suppliers. Click on actions for the supplier and it will show “Pay Due amount”, click on it and pay the amount. “Pay Due amount” this option is not displayed if there is no payment due.

Rounding Mechanism for total Sales amount or total payable

Rounding helps to round the total payable to nearest currency exchange available.

To enable rounding go to Settings -> Business Settings -> Sales and choose the Amount rounding method

Amount rounding method

Round to nearest whole number: It will round the payable value to nearest whole number. For example, 1.49 will be rounded to 1.00, and 1.51 will be rounded to 2.00

Round to nearest decimal (multiple of 0.05): It will round the payable value to nearest decimal number which is multiple of 0.05. For example, 1.49 will be rounded to 1.50, 1.51 will be rounded to 1.50, 1.59 will be rounded to 1.60, 1.54 will be rounded to 1.55

Similar all other round to nearest decimal number works as per the multiplier.

Sales Return:

There are two methods for adding sales returns:

First Way:

1. Edit the existing invoice for the sale by accessing the invoice editing feature.
2. Remove the product entirely or reduce the quantity of the product to be returned.
3. Save the changes. The system will automatically update the stock by adding back the returned quantity. This method is simple and recommended.

Second Way:

Please refer to the provided screenshot for guidance on an alternative method.

Click here and it will open a form with the sales details
There add return quantity.

Action	Date	Invoice No.	Customer name	Contact Number	Location	Payment status	Payment Method	Total amount	Total paid	Sell Due	Sell Return Due	Shipping Status
View	06/25/2021	A-0004	Walk-In Customer	(378) 400-1234	Awesome Shop	Paid	Cash	\$ 750.00	\$ 750.00	\$ 0.00		
Edit		i5	Walk-In Customer	(378) 400-1234	Awesome Shop	Paid	Cash	\$ 412.50	\$ 412.50	\$ 0.00		
Delete		i7	Walk-In Customer	(378) 400-1234	Awesome Shop	Paid	Cash	\$ 2,818.13	\$ 2,818.13	\$ 0.00		
Edit Shipping		i6	Walk-In Customer	(378) 400-1234	Awesome Shop	Paid	Cash	\$ 1,631.25	\$ 1,631.25	\$ 0.00		
Print Invoice		i2	Walk-In Customer	(378) 400-1234	Awesome Shop	Paid	Cash	\$ 825.00	\$ 825.00	\$ 0.00		
Packing slip												
View Payments												
Duplicate Sell												
Sell Return												

Question: Why does the sales return value not decrease the payment value from the parent invoice?

- SMARTBMS ERP adjusts these values in the Profit & Loss report.
- Regarding payments, users must add a transaction for receiving payment from the customer and then paying them back. This ensures that all transactions are recorded.

7. Cash Register:

- The Cash Register provides an overview of a particular user/cashier session.
- When a cashier opens the POS screen, they must Open the Cash Register by entering the "Cash In hand."
- If the cashier has access to more than one location, they also need to select the location.
- Every sale made by the cashier is logged into the Cash Register. In the POS screen, you can view the Register details by clicking on the "Register details" button in the top navigation bar. It displays the Cash in hand, cash details by other payment methods, and the amount refunded by the cashier.

- To close a cash register, click on the Red "Close Register" Button. Upon closing the Cash register, the cashier will have to enter the details of the Total Cash, Total Card Slips, Total cheques, and other fields.

- To view all cash registers, Go to Reports -> Register Report. Here you can view all cash register details.

8.0 Stock Adjustment:

- Stock Adjustment helps decrease the goods held in stock. It's used for manual stock adjustments, typically for writing off damaged stock or adjusting quantities after a stock take.

- To create a stock adjustment:

1. Go to "Add Stock Adjustment."
2. Select the Business Location & date.
3. Choose Adjustment Type (Normal Or Abnormal).
4. Add the products & quantity you want to decrease.
5. Enter the Total amount recovered, if applicable.

- The quantities entered for each product will be deducted from the available quantities.

- Details of stock adjustments can be viewed in the "Stock Adjustment Report."

- Stock Adjustment affects the Profit & Loss Report (P & L Report). "Total Stock Adjustment" amount is deducted from the P & L Report, and "Total Stock Recovered" amount is added to the Profit & Loss Report.

9.0 Reports:

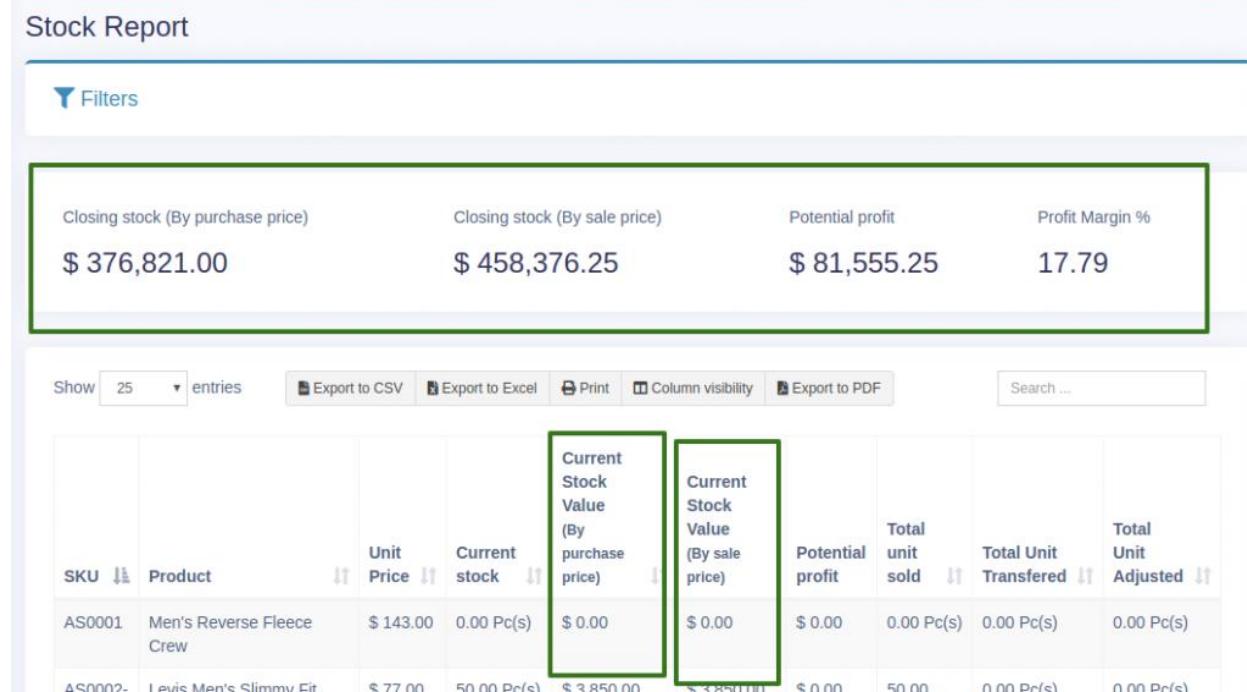
- Reports provide an overview of the entire business.

- To view a report, click on Reports & Select the desired report.

- Some Reports come with filter options to help analyze the business better.

- Purchase & Sale Report: Shows total purchases, including taxes, purchases with Due amount; and total sales, including taxes, and sales due.
- Tax Reports: Displays Input & Output Taxes.
- Contacts Report (Customers & Suppliers Reports): Shows details of Purchase & Sell with all contacts (Suppliers & Customers) and any Due amount.
- Stock Report: Displays stock details, including remaining stock and total quantity sold for all products.
- For variable products, click on the Green Plus button before the SKU column to get detailed stock reports for each product variation.
- Stock value by Purchase & sales price: In the stock report, get information about current stock value based on purchase price & value based on selling price.

Stock Report



Filters

Closing stock (By purchase price)	Closing stock (By sale price)	Potential profit	Profit Margin %
\$ 376,821.00	\$ 458,376.25	\$ 81,555.25	17.79

Show 25 entries [Export to CSV](#) [Export to Excel](#) [Print](#) [Column visibility](#) [Export to PDF](#) Search ...

SKU	Product	Unit Price	Current stock	Current Stock Value (By purchase price)	Current Stock Value (By sale price)	Potential profit	Total unit sold	Total Unit Transferred	Total Unit Adjusted
AS0001	Men's Reverse Fleece Crew	\$ 143.00	0.00 Pcs	\$ 0.00	\$ 0.00	\$ 0.00	0.00 Pcs	0.00 Pcs	0.00 Pcs
AS0002	Levi's Men's Slimmy Fit	\$ 77.00	50.00 Pcs	\$ 3,850.00	\$ 3,850.00	\$ 0.00	50.00	0.00 Pcs	0.00 Pcs

Tracking product stock report with date

To check the product stock report date wise, use the '**product stock history**' link in the stock report.

Trending Products Report:

- This report helps determine the demand for products.
- Apply various filters to refine the product data.
- Select a Business Location to view trends specific to that location.
- Filter by Product Category, Sub-Category, Brands, Units, and Date Range.
- Set the "No. of products" parameter to view the top products based on quantity sold, such as Top 5 or Top 10.

Expense Report:

- Analyze expenses for business locations and expense categories.
- Gain insights into expenditure patterns.

Register Report:

- View details of all cash registers.

- Filter registers by User and/or Status (Open or Closed).

Sales Representative Report:

- View sales and expense details for sales representatives.
- Filter data by User, Business Location, and Date Range.

Grouping Invoices in Product Sell Report:

- In the Product Sell Report, invoices are grouped based on specific criteria for user convenience.
- Navigate to Reports > Product Sell Report and click the Grouped tab.
- Invoices are grouped based on criteria such as date and product name.
- For example, all Butter Cookies sold today will be shown in one row, while Butter Cookies sold yesterday will be shown in another row.

HRM Module in SMARTBMS ERP:

The HR module in the SMARTBMS ERP system is loaded with features **to handle all aspects of personnel management, including recruitment, payroll, attendance, leave management, setting sales targets along many other critical operations.**

Note: This document explains the HRM (Human resource management) feature in Essential's module.

HRM modules consist of:

1. Leave types & Leaves.
2. Attendance
3. Payroll

4. Holiday
5. & related settings

Leave Management:

1. Add leave: Leave Type (dropdown list), Start Date, End Date, Leave type, Reason (text area)
2. Default status of a leave added is pending
3. Admin can change the status: status (pending, canceled, approved) by clicking on the leave status column button.
4. Inbuilt app Notification will be sent to admin when a new leave is added.
5. Inbuilt app Notification will be sent to the applied user when the status is changed by the admin.
6. Only admin can delete a leave.
7. **Reference no.** Will be generated automatically for every leave to uniquely identify them. You can change the reference no prefix from HRM -> Settings (Leave Reference No. prefix)
8. **Leave Instructions:** You can enter special instructions for users before applying for leaves from the settings “Leave Instructions” field.

Leave types

1. Only admin can manage leave type (add or edit)
2. Fields:
 1. Leave Type: Enter the name of the type of leave.
 2. Max leave counts: Maximum number of leaves allowed for the leave type.
 3. Leave count interval: This can be “Current month” or “Current financial year” or “None”. It is the interval for the maximum leave counts.

For example: If employees can take 12 Sick Leave in 1 year, then:

Leave Type = “Sick Leave”

Max leave counts = 12

Leave count interval = “Current financial year”

Leaves Summary for a user

1. For admin: Admin can view leave summary of all other users. On the leaves page filter by an employee name and it will show the summary at the bottom of the page.
2. For Users: Always visible to a user his/her summary.

The screenshot shows the 'Leave' module interface. At the top, there are filters for 'Employee' (set to 'Mr Admin'), 'Status' (All), 'Leave Type' (All), and 'Date Range' (01/01/2020 - 12/31/2020). Below the filters, a table lists 'All Leaves' with columns: Reference No, Leave Type, Employee, Date, Reason, Status, and Action. One entry is shown: 2020/0001, Sick Leave, Mr Admin, 04/20/2020 - 04/21/2020 (2 Days), Pending, and buttons for Delete and Activity. A note 'Showing 1 to 1 of 1 entries' is at the bottom. At the bottom of the page, a section titled 'Leaves Summary for Mr Admin' is highlighted with a red box, showing a table with columns: Leave Type, Pending, Approved, Cancelled, and Maximum allowed leaves. The data is as follows:

Leave Type	Pending	Approved	Cancelled	Maximum allowed leaves
Sick Leave	2 Days	0	0	N/A
Vacation Leaves	0	0	0	N/A
Maternity leave	0	0	0	N/A
Others	0	0	0	1 Days (Within current month)
Total	2 Days	0 Days	0 Days	

Attendance Management:

Attendance by admin & other users

1. Users can add their own attendance, admin can add the attendance of every user.
2. Attendance fields for admin: Employee, Date, Ip address (auto get the user's IP address), note, clock_in_time, clock_out_time.
3. **Attendance by non-admin users:** Users can add their own attendance by clicking on the “Clock In” button present in the top navigation bar and clock-in adding a note. And click on the “Clock Out” button before leaving the workplace for checkout and adding a clock-out note.

4. Total work hours will be displayed when the admin selects a particular user and it is always visible to a non-admin user.
5. If the admin wants to add attendance for users & don't want the user to add their attendance then it can be disabled by unchecking "Allow users to enter their own attendance"

How can users add their own attendance?

Follow the steps below for users to add their own attendance

Step 1: Enable the "Allow users to enter their own attendance" in the **User Management > Roles** for that particular user.

Step 2: Log in with that particular user's login details.

Step 3: In the attendance tab, the user can now clock-in and clock-out, thus marking their own attendance.

Grace Time:

1. Grace time is useful for fixed shifts.
2. Grace before check-in: Is additional time that is not counted as overtime. Meaning if **Grace before check-in** is defined as 30Min & a shift starts at 11 AM, then even if someone check-in at 10.30 AM it'll not be considered as early check-in
3. Grace after check-in: Similar to before, this is time that is not considered as late even after checking in late. If Grace after check-in is 30 Min, then doing a check-in at 11:30 AM will be allowed.
4. Grace before checkout/Grace after checkout: Same as above 3 & 4, but this applies to check out timing.

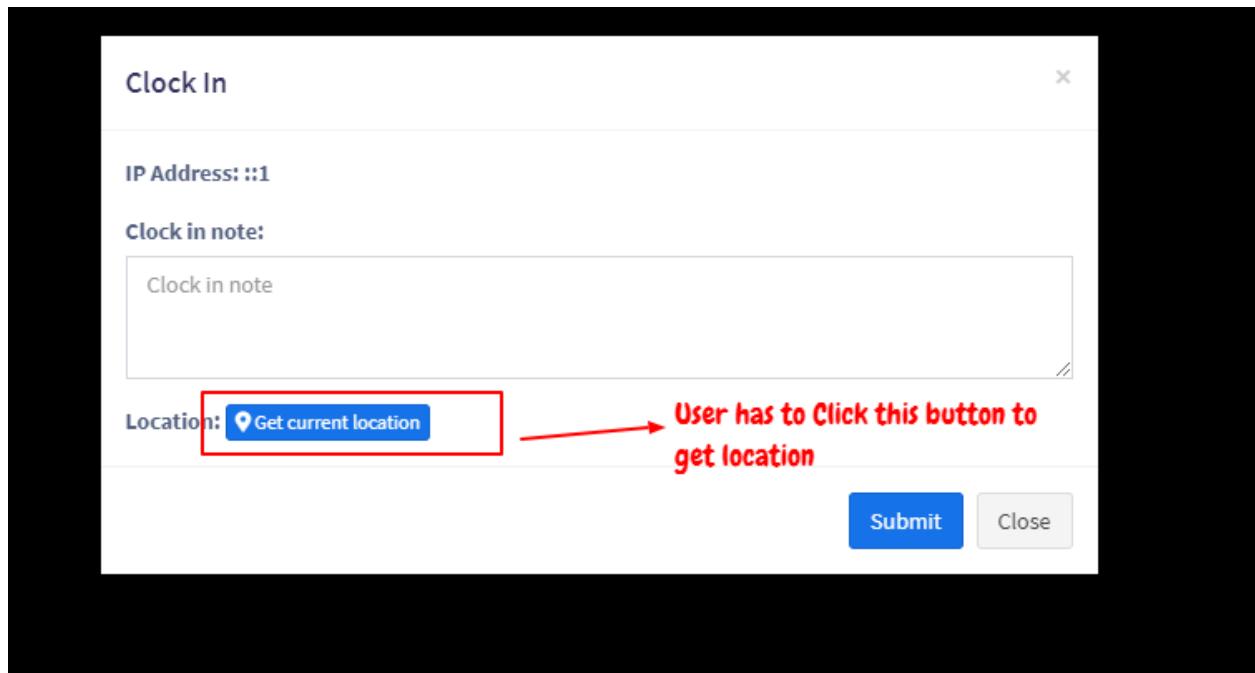
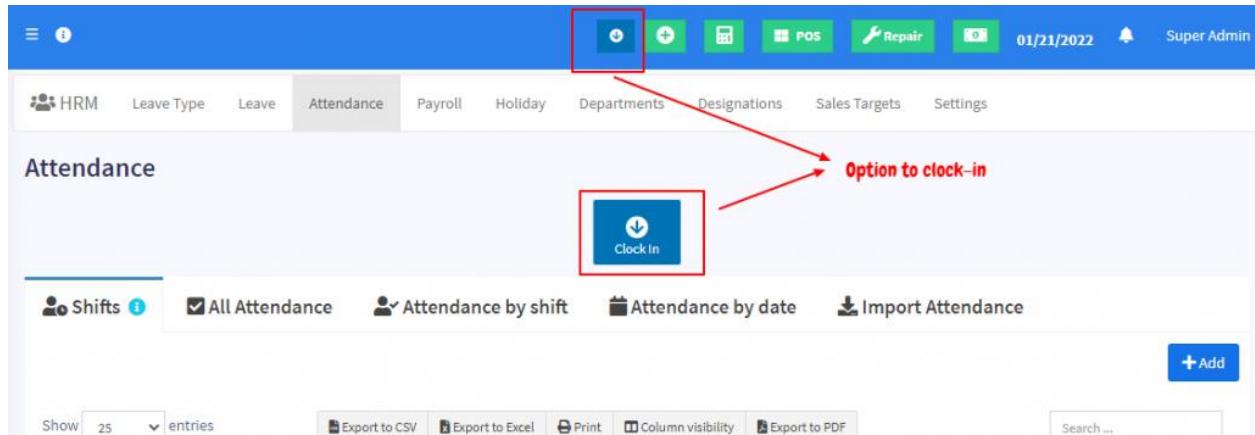
Getting the user's location in attendance:

When a user/employee clocks-in the system can save the user's location from which he/she has put attendance.

NOTE: For the location to work your website must be HTTPS

1. Enabling Location:

1. Go to HRM -> Settings -> Attendance Tab.
2. Check the “Is Location Required?” checkbox & save it
2. Check the below screenshot for locations when adding clock-in



How accurate is the location?

Accuracy of Location depends on the API & device (mobile or laptop) used and not on the application.

Mobile: mobile has GPS enabled so the coordinates sent by them is more accurate

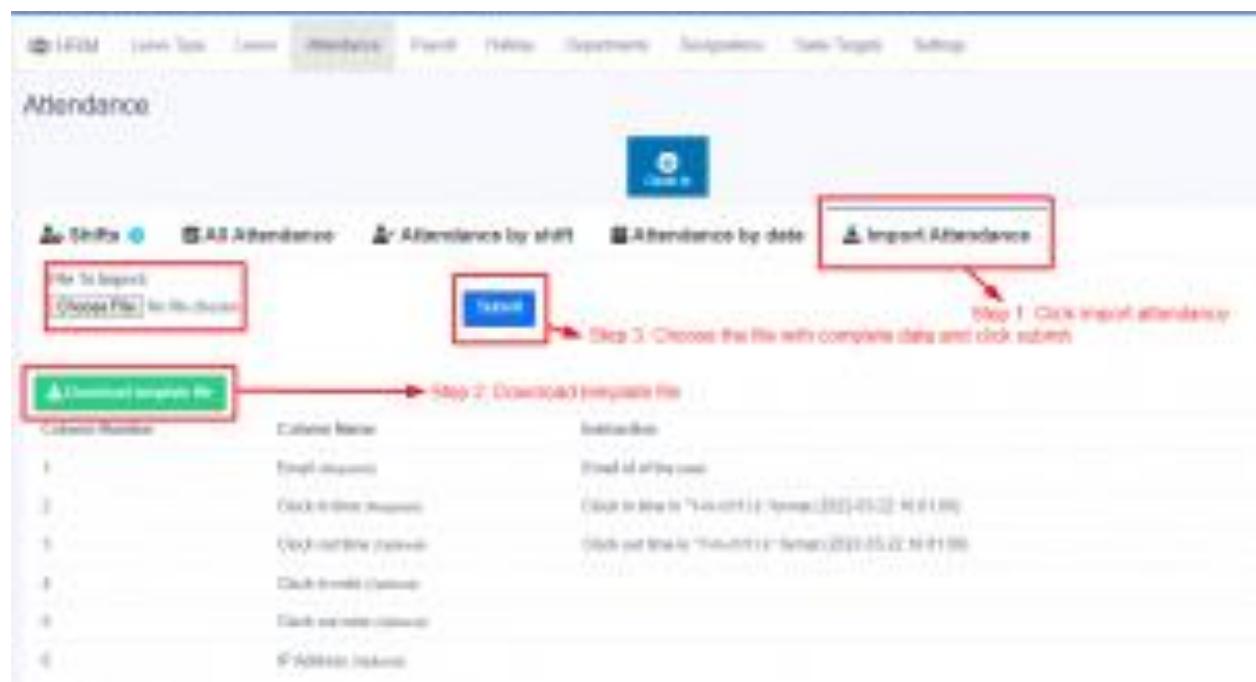
Laptop: Most laptops don't have GPS enabled so the location is based on the IP address, which is not much accurate

Note: The updated google map API key should have geocoding enabled.

Biometric Scanner Integration in Attendance:

If a biometric system is used for attendance, then the data from the excel file exported from the biometric system can be fed into the downloaded template file. The complete data can be then imported into the POS system.

Use the import attendance feature to achieve this.



Notes:

Sometimes, you may have an issue with import attendance due to an incorrect date format in the imported Excel sheet. Check the below conditions and ensure that the format is correct

- The clock-in & clock-out should be in the format “Y-m-d H:i:s” ex: (2023-06-04 21:13:55).
- The format type of clock-in & clock-out should be in text format in the Excel sheet.

Shift management:

There are two types of shifts that you can create for users.

Fixed shift:

- With the fixed shift, you can create shifts with a specific starting and ending time.
- Therefore, users can clock in only at a specific time.
- If users try to clock in or clock out at a time later or earlier than the specified time it will show an error message.

Flexible Shift:

- With the flexible shift, you can create shifts without specific timing
- Therefore, users can clock in and clock out at any time.

Assigning shifts to users:

The created shifts can be assigned to specific users, so when users log in, they can clock in for the shifts assigned for them.

Click the assign users' button for a particular shift and assign shifts for users at particular dates.

Shifts (1) All Attendance Attendance by shift Attendance by date Import Attendance						
Import CSV Export to Excel Print Calendar visibility Export to PDF						
Name	Shift Type	Start time	End time	Holiday	Action	
Shift 1	Fixed shift	08:00	06:00	Sunday, Monday	Edit Assign Users	
Shift 2	Flexible shift	01:00	06:00	Sunday, Tuesday	Edit Assign Users	
Shift 3	Flexible shift	00:00	01:00		Edit Assign Users	

Showing 1 to 3 of 3 entries

Previous [1](#) Next

ERROR: No active shift at this time

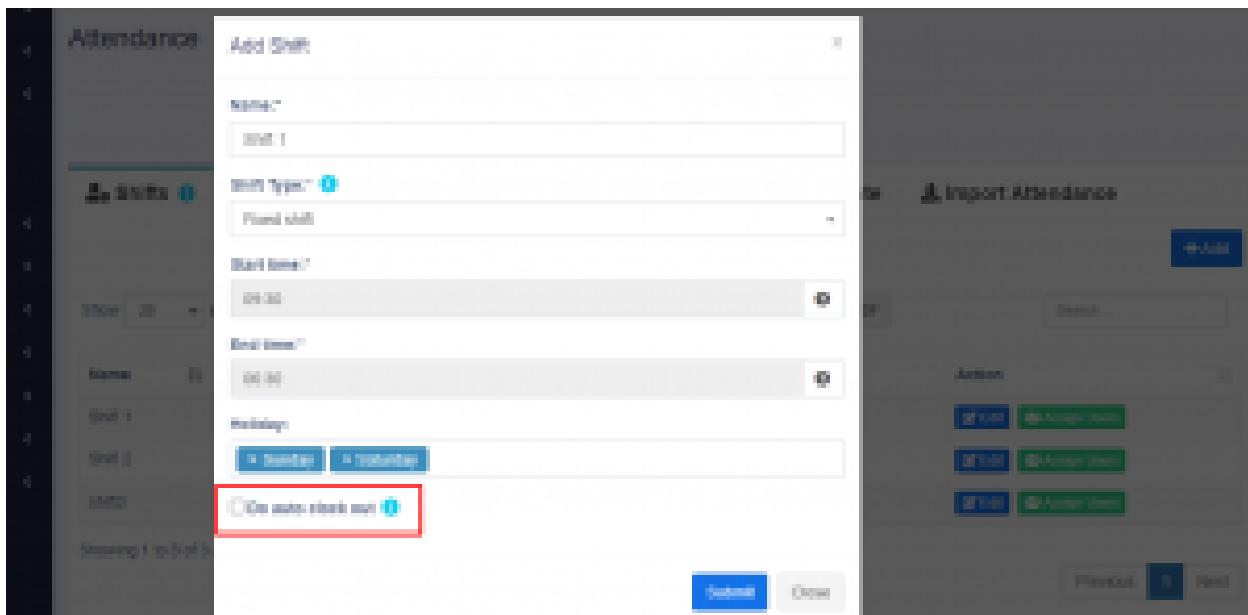
Sometimes while users try to clock-in, it may show this error. This is because there are no fixed shifts available for that time when they login.

In such conditions you can either manually add the attendance for such users in the attendance tab.

Refer to the video given for more information

Auto clock out option:

By enabling this option, the system will automatically end the shift for users and they can automatically clock out.



Payroll Management:

1. Only admin can add payroll & other users can view only their own payroll.
2. **Reference no.** will be generated for Payroll. You can change the Payroll Reference No. prefix from settings.

Adding Payroll

1. For adding payroll click on Add button in payroll menu.
2. Select Employee and the month/year of payroll.
3. If any existing payroll for the period, then it will be shown for editing or new payroll can be added.
4. Fields:
 1. **Total work duration:** Duration of work will be auto-calculated based on attendance
 2. **Duration Unit:** Unit of work like month/hour/week or other.
 3. **Amount per unit duration:** Price per duration.
 4. **Total:** Total work duration x Amount per unit duration
 5. **Allowances:** add as many allowances you have for the employee. Allowances will be added in final payroll.

6. **Deductions:** add deductions for the employee. Deductions will be subtracted in final payroll.

5. **Gross amount** = Total + Sum of Allowances – Sum of Deductions

6. Inbuilt app Notification will be sent to the user when payroll is added.

Editing Payroll

To edit a payroll, click on ‘All payroll groups’ tab -> Action -> Edit

Making Payment for Payroll:

To make payment for a particular payroll, Go to Payroll -> All payroll groups.

Click on the action button -> Payment.

Payroll								
All Payrolls		All payroll groups		Pay Components				
Date	From	To	Start Date	End Date	From	To	From	To
Payroll for March 2020	01/03	31/03	01/03/20	31/03/20	10,000.00	10,000.00	10,000.00	10,000.00
Payroll for January 2020	01/01	31/01	01/01/20	31/01/20	10,000.00	10,000.00	10,000.00	10,000.00
Payroll for June 2020	01/06	30/06	01/06/20	30/06/20	10,000.00	10,000.00	10,000.00	10,000.00
Payroll for July 2020	01/07	31/07	01/07/20	31/07/20	10,000.00	10,000.00	10,000.00	10,000.00
Payroll for March 2020	01/03	31/03	01/03/20	31/03/20	10,000.00	10,000.00	10,000.00	10,000.00
Payroll for March 2020	01/03	31/03	01/03/20	31/03/20	10,000.00	10,000.00	10,000.00	10,000.00

Making Partial Payment for Payroll:

If you want to add a partial payment payroll for all employees or a group of employees follow the step below.

Step 1: Navigate to the Payroll section and select the “**All Payroll Payment**” tab.

Step 2: Click on “**Actions**” and choose “**Add Payment**” for the specific payroll you want to make payment for.

Step 3: You’ll be directed to the payment screen, where you can enter the required amount.

Step 4: Click “**Save**” to confirm the partial payment.

Step 5: If you wish to add the remaining amount later, repeat the same steps mentioned above.

NOTE: While adding payroll payments, you can include payment notes. For instance, if you’re making the first due payment, mention it in the payment notes.

Adding Bulk Payroll and Bulk Payment for Payroll:

If you want to add a bulk payroll for all employees or a group of employees follow the step below.

For example: If you have 100 employees then you need to enter 100. You should have a bulk pay option.

While adding payroll, select all the employee names for bulk payment.

After adding the payroll, go to the ‘**All Payroll Groups**’ tab where you can find the payroll as a group to add the bulk payment.

Adding Bonus in Payroll:

While adding a payroll, add a description “bonus” and add the bonus amount.

This way you can add the bonus amount with the payroll.

Holidays Management:

1. Only admin can add holiday.
2. Other users can view holidays applicable for their location.

Adding Holidays

Fields: Name, Start Date, End Date, Business Location, Note

Permission & Settings for management for HRM

Approve Leave:

By default, only admin can approve leave added by other users. But you can assign the **Approve leave** permission to any other role & assign it to a user. User having approve leave will be able to approve leaves added by other users.

Allow users to enter their own attendance:

You will find this option in **HRM -> Settings -> HRM** tab. If enabled other users will be able to enter their own attendance and vice-versa.

Features in Asset management module for SMARTBMS ERP:

1. Add assets
2. Track assets warranty
3. Categorize assets
4. Get details of asset counts
5. Allocate assets to an employee or users
6. Allocated/Unallocated assets
7. Revoke asset
8. Asset maintenance
9. Asset Return (*coming soon*)
10. Asset history (*coming soon*)

Allocate Asset

Any asset can be allocated to a particular user.

Go to **All Assets > Action > Allocate Asset** and select the user's name, quantity and the date period. Click save button.

The report on allocated assets is shown in '**Asset Allocated**' tab.

Asset Maintenance

Asset maintenance helps to maintain assets under repair or any kind of service related to it.

Any user who has been assigned an asset can send it for maintenance when required.

Sending it to maintenance will send an in-app notification & also an email notification if enabled to some of the selected recipients.

Sending assets for maintenance:

If any asset is to be repaired or send for maintenance purpose can be added here.

Go to **All Assets > Action > Send Asset for Maintenance** and provide the required details (attachments can also be attached). Click save button.

The report on asset added for maintenance are shown in '**Asset Maintenance**' tab.

The status of maintenance can be changed here using edit option.

Asset Revoked

The assets allocated to users can be withdraw or cancelled for various reasons.

Go to **Assets Allocated > Action > Revoke** and provide the required details. Click save button.

The report on revoked assets is shown in '**Asset Revoked**' tab.

Asset Categories

While adding an asset, it can be categorized under a category. For example, assets like chair, table can be added under category furniture asset or office asset.

Categories for assets can be added, edited and deleted in this tab.

Asset Settings

Settings prefixes and notifications can be done under settings tab

Prefixes:

Each of the asset has a code for reference. Also, when assets are allocated, revoked or added for maintenance, it is referred with a code for easy identification.

The prefix for these codes can be set as per required.

Prefixes can be set for Asset code, Allocation code, Revoke code and Asset maintenance in the **Settings > Prefix** tab.

Notification:

‘Asset send for maintenance’ Notification:

This notification is sent when a new asset is sent for maintenance by any user.

Go to **Settings > Notification and select**

Enable the check box ‘**Enable email**’ and select the recipients to whom the notification is to be send.

Add mail subject and body using the available tags and save it.

Whenever a new asset is added by any user, the notification is sent to the selected recipients.

‘Asset assigned for maintenance’ Notification:

This notification is sent when a user is assigned an asset for maintenance (repair/do servicing etc.).

Go to **Settings > Notification** and enable the check box **‘Enable email’**.

Add mail subject and body using the available tags and save it.

Whenever a user is assigned an asset for maintenance, the notification is sent to that user.

Business Settings

1 Sales:

1.1 Sales Item Addition Method:

1.2 Amount rounding method:

1.3 Sales price is minimum selling price:

1.4 Enable inline Tax:

1.5 Enable Sales Order:

1.6 Default Sale Discount:

1.7 Limit for Transaction Edit:

1.8 Data table Entry Selection:

1.9 Allow Overselling of Products:

Business Settings allows you to set some of the common business-related information.

Here you can change:

Business name

Start Date

Set Default Profit margin

Currency

Time zone

Logo

Financial year: For some countries, the financial year starts from January and for some it starts on April. Here you can set the appropriate option for your country.

Tax information

Product SKU prefix: Enable this feature to generate a prefix for Product SKU. Once enabled, while adding a new product the SKU field will add this prefix along with the input given or if left empty will auto generate a value along with this prefix.

Default Sales discount

Default Sales tax

Business Setting > Contact > Default credit limit: The credit limit provided here will be used as default value when creating a customer or supplier

Business Setting > Sale > Default Sale Discount: The default discount will be used for all sales in POS & Add sales screen.

Sales:

Sales Item Addition Method:

It has 2 options: “Add item in new row” & “Increase item quantity if it already exists”

This option is related to POS & Sales screen when a new product is added.

Add item in new row: It will always add a product in new row

Increase item quantity if it already exists: If the product already exists in the cart it will increase its quantity else it will add it in a new row.

Amount rounding method:

The price of the products can be taken as a whole number or as a rounded decimal value by selecting the particular round off method. If none is selected the value is taken as a whole number.

Sales price is minimum selling price:

If this option is enabled then the product cannot be sold at a price lower than the selling price set for the product.

It can be sold at a higher price but not at a lower price.

Enable inline Tax:

To display the price include tax on the POS screen, kindly enable the check box in the Business Settings->Tax.

Enable Sales Order:

This will enable the sales order feature.

Default Sale Discount:

The default sale discount can be added to products in Business Settings -> Sale

Limit for Transaction Edit:

How to edit transactions for more than 30 days?

In order to increase the limit for editing the transaction, set the number of days in the business settings.

Data table Entry Selection:

The default number of entries in the data tables can be selected in Business Settings -> System.

Allow Overselling of Products:

In some cases, the products need to be sold even when they are out of stock. In such cases, you can enable the “Allow Overselling” Option from the Business Settings > Sale.

This will allow you to add sales for non-stock products.

NOTE: If the sale is added for products that are out-of-stock using the Allow Overselling Option, then the profit will be calculated as negative for those products.

USER MANAGEMENT

Adding User & assigning location to a user

Table of Contents

1 Adding users

2 Assign locations

3 Max sales discount:

4 Disable login

Adding users

User Management -> Users -> Add New

Fill the user details, select user role, and give a unique username.

Sales Commission Percentage (%): Provide the commission % for this user. This option gets applied if the commission agent feature is enabled. Is active? Activate/Deactivate the user.

You can edit/delete a user.

Assigning locations in SMARTBMS ERP typically refers to associating products, users, or transactions with specific physical or virtual locations within your business. Here's how you can assign locations in SMARTBMS ERP

1. Assigning Products to Locations:

- Navigate to the Products section within SMARTBMS ERP.
- Select the product you want to assign to a location or create a new product if it's not already in the system.
- In the product details or settings, you should find an option to assign the product to one or multiple locations.

- Choose the appropriate location(s) from the available list or create new locations if needed.
- Save the changes to update the product's location assignment.

2. Assigning Users to Locations:

- If you have multiple physical locations or departments within your business, you may need to assign users to specific locations.
- Go to the User Management section in SMARTBMS ERP.
- Select the user you want to assign to a location or create a new user if necessary.
- Edit the user profile and look for an option to specify the user's primary location or locations.
- Choose the relevant location(s) from the dropdown menu or enter the location details manually.
- Save the changes to update the user's location assignment.

3. Assigning Transactions to Locations:

- In some cases, you may want to track transactions (e.g., sales, purchases, transfers) by location for reporting or inventory management purposes.
- When creating or editing a transaction (e.g., sales order, purchase order, stock transfer) in SMARTBMS ERP, you should find an option to specify the transaction's location.
- Choose the appropriate location from the available list or enter the location details manually if needed.
- Save the transaction to record it with the assigned location information.

4. Viewing and Managing Location Assignments:

- Once you've assigned products, users, or transactions to locations, you can view and manage these assignments in the respective sections of SMARTBMS ERP.
- Use filters or search functionality to quickly find items or users assigned to specific locations.
- You can edit or update location assignments as needed to reflect changes in your business operations or organizational structure.

5. Integration with Inventory Management:

- Assigning locations in SMARTBMS ERP is closely tied to inventory management processes.

- By tracking product movements and stock levels by location, you can optimize inventory replenishment, reduce stock outs, and improve overall inventory control.
- Utilize reporting and analytics features to gain insights into inventory performance across different locations and make data-driven decisions.

By effectively assigning locations in SMARTBMS ERP, you can streamline operations, improve visibility into your business processes, and enhance overall efficiency and productivity.

Max sales discount:

The maximum discount this user can give during sales in the POS & sales screen. If you don't want to have this restriction then simply keep this value blank.

Stock transfer

1 What is Stock Transfer?

2 Editing stock transfer

3 Stock not showing in Location (to)

What is Stock Transfer?

Stock transfer is the process of sending/transferring stock from one location to another location.

When the stock transfer is done, the stock level decreases from the Location (From) and increases in Location (To).

This stock level change happens only if the Status is completed

Stock changes don't happen for other statuses like Pending and In-Transit

Once the status is marked completed stock transfer cannot be edited. But can be deleted

Editing stock transfer

Stock transfer can be only be edited when the status of the transfer is pending or in transit.

After it is completed, the stock transfer cannot be edited. However, you can delete it and create a fresh one if you would like to.

Stock not showing in Location (to)

Make sure product is Added to the location

Make sure transfer status is completed

KITCHEN AND RESTAURENT

Tables, Service Staff, Bookings, Modifiers, Kitchen – for Restaurants, Saloon, Service center & others

1 Enable Modules:

2 Table Module

3 Service Staff

4 Bookings

5 Modifiers

6 Kitchen

7 Auto-refresh kitchen & Order screen:

Enable Modules:

Go to System Settings & enable the below modules

Tables

Service Staff

Modifiers

Kitchen

Note 1: Enabling Tables & Service Staff will automatically enable Bookings module.

Note 2: Enabling Tables & Service Staff will automatically enable the reports for it. “Table Report” & “Service Staff Report”.

Table Module

Enable “Table” module as explained above

After table module is enabled go to Settings -> Table

Add all the table of your restaurants by selecting Business Location, Table name & Short Description (optional)

Tables are used in POS screen take order for a particular table.

If you have multiple locations & the logged in user have access to multiple locations then in POS screen you must select the Business Location to get table related to that location.

Service Staff

Enable “Service Staff” module as explained above

After Service Staff is enabled go to User Management -> Roles.

Go to – Create or Edit a role. Check the “Service Staff” checkbox for User Type to make to assign Service Staff permission to it.

Orders are assigned to Service Staff in POS screen.

“Service Staff” can see a new menu “Orders” which will help them to know all the orders for them. They can View the order item and change the order status.

Enable service staff for each product in a sale: To assign different service staff for each product in sales/pos screen, go to Business Settings -> POS -> Enable service staff in product line

Bookings

Enable “bookings” module as explained above

Go to the booking section from the left navigation.

There you will see all “Today’s Bookings”

Also, a calendar is present where you can “Double” click any date to add bookings for it. In add booking screen you can select the Location, Customer, Correspondent, Table, Service Staff, Start & End time. Also, notification can be sent to customers.

Modifiers

Modifiers are like extra stuff that can be added to a product, like extra cheese to a sandwich etc.

Enable modifiers module as described above.

Go to Settings -> Modifiers

Click on add

Give a new to modifier set. Like “Cheese”

Enter multiple Modifiers name & price. Like “Single” – 10, Double – 17

Save it.

Click on “Manage Product” for the modifiers.

Associate all products where this modifier can be used. Like Sandwich.

After modifiers are added, in POS screen when the product is added for sale, it will show the modifiers that can be used for this products. Like if we add Sandwich then it will display the “Cheese”, “Bread” modifiers.

Modifiers can be mostly used in Restaurants. Also, it can be used in various other similar businesses & shops.

Kitchen

Enable the kitchen module as explained above.

Go to Kitchen screen from left navigation.

Whenever an order is received in POS screen it will reflect in Kitchen screen.

Order details can be viewed here.

Orders can be marked as cooked. After marking as Cooked it will reflect in Order screen for service provider so that they can serve it the customer.

Asset management module

1. Adding Assets:

- Navigate to the Asset Management Module in SMARTBMS ERP.
- Click on the "Add Asset" button.
- Fill in the required details for the asset, including name, model, serial number, purchase date, and warranty information.
- Optionally, categorize the asset into predefined categories for better organization.
- Click "Save" to add the asset to your inventory.

2. Tracking Assets Warranty:

- After adding assets, you can track their warranty information.
- Access the asset details to view warranty start and end dates.
- Set up notifications to alert you when warranties are about to expire to ensure timely maintenance or replacement.

3. Allocating Assets:

- Allocate assets to specific employees or users for tracking purposes.
- Navigate to the "All Assets" section and select the asset you want to allocate.
- Choose the user's name, specify the quantity, and set the allocation period.
- Click "Save" to allocate the asset to the selected user.

4. Managing Asset Maintenance:

- Schedule maintenance activities to ensure optimal performance of your assets.
- Access the "Asset Maintenance" tab and select the asset requiring maintenance.
- Provide details of the maintenance request, including attachments if necessary.
- Save the maintenance request to initiate the maintenance process.

5. Revoking Assets:

- Withdraw or cancel asset allocations when needed.
- Navigate to the "Assets Allocated" section and select the allocated asset.
- Choose the "Revoke" action and provide the required details to revoke the asset allocation.

6. Organizing Assets into Categories:

- Organize assets into logical categories for easier management.
- Access the "Asset Categories" tab and add, edit, or delete asset categories as needed.
- Assign assets to appropriate categories for better organization and tracking.

7. Configuring Asset Settings:

- Configure asset-related settings to suit your business requirements.
- Access the "Settings" tab and set up prefixes for asset codes, allocation codes, revoke codes, and asset maintenance.
- Customize notification settings to receive alerts for asset-related events.

8. Reviewing Asset History:

- Access historical data on asset transactions, maintenance activities, and usage patterns.
- Generate reports to analyze asset performance and utilization over time.
- Use insights from asset history to make informed decisions about asset management and allocation.

9. Utilizing Asset Return and Advanced Features:

- Take advantage of advanced features such as asset return and asset history (if available).
- Track asset returns from users and employees to maintain accurate inventory records.
- Analyze asset history to identify trends, patterns, and areas for improvement in asset management practices.

By following these steps and utilizing the features available in the Asset Management Module of SMARTBMS ERP, you can effectively manage your assets, optimize asset utilization, and ensure maximum return on investment.

Feel free to adapt this tutorial to your specific use case and customize it based on your organization's requirements and workflows.

[Notification and Templates in SMARTBMS ERP:](#)

Notification and templates in SMARTBMS ERP empower you to automate communication processes, streamline operations, and enhance customer satisfaction. Here's a step-by-step guide on how to set up and utilize notification templates effectively:

1. Setting up Notification Templates:

- Navigate to the notification settings section within SMARTBMS ERP.
- Create custom notification templates for various events and actions, such as order confirmation, payment receipt, or delivery status updates.
- Customize template content with dynamic variables to personalize messages for each recipient, incorporating details like order numbers, product names, or delivery dates.
- Preview and test notification templates to ensure accuracy and effectiveness before saving and activating them for use in your daily operations.

2. Configuring Notification Triggers:

- Define triggers for each notification template based on specific events or conditions in your business processes.
- Specify when notifications should be sent, such as when an order is placed, payment is received, or a delivery is scheduled.
- Set up automated workflows to trigger notifications at key stages of the customer journey or transaction lifecycle, aligning them with your business processes and customer expectations.

3. Managing Recipients and Channels:

- Determine the recipients for each type of notification, such as customers, staff members, or administrators.
- Configure notification channels, such as email, SMS, or in-app messages, based on recipient preferences and accessibility.
- Optimize delivery methods to ensure timely and reliable communication with recipients, monitoring delivery status and troubleshooting any issues that arise.

4. Personalizing Notification Content:

- Utilize dynamic variables within notification templates to personalize content based on recipient information or transaction details.
- Include relevant details such as order numbers, product names, delivery dates, or payment amounts in notification messages to provide context and enhance engagement.
- Tailor messages to reflect your brand voice and values while maintaining clarity and professionalism, testing different variations to optimize engagement and response rates.

By following these steps and leveraging the notification and template features in SMARTBMS ERP effectively, you can enhance communication, improve operational efficiency, and drive customer satisfaction across your organization.

EXPENSES

SMARTBMS ERP, the expenses feature allows you to track and manage all your business-related expenses efficiently. Here's an explanation of how expenses work in SMARTBMS ERP:

Recording Expenses:

You can record various types of expenses such as rent, utilities, office supplies, salaries, etc., incurred in the course of running your business.

To record an expense, navigate to the Expenses section within SMARTBMS ERP.

Click on the "Add Expense" button and fill in the required details such as expense category, amount, date, and description.

Optionally, you can attach supporting documents such as receipts or invoices to the expense entry for reference and documentation purposes.

Expense Categories:

SMARTBMS ERP allows you to categorize expenses into different categories for better organization and analysis.

You can create custom expense categories based on your business needs and requirements.

Common expense categories may include operating expenses, cost of goods sold, utilities, rent, marketing, etc.

Expense Management:

Once recorded, expenses are stored in the system and can be viewed, edited, or deleted as needed.

You can search for specific expenses using filters such as date range, category, or keyword.

SMARTBMS ERP provides a comprehensive overview of your expenses, including total expenses incurred over a specified period and expense breakdown by category.

Expense Reporting:

SMARTBMS ERP offers various reporting tools to help you analyze your expenses and financial performance.

You can generate expense reports to track spending trends, identify cost-saving opportunities, and make informed business decisions.

Expense reports may include summaries, charts, and graphs to visualize expense data effectively.

Integration with Other Modules:

Expenses in SMARTBMS ERP are seamlessly integrated with other modules such as sales, inventory, and accounting.

You can link expenses to specific transactions or projects for accurate cost allocation and analysis.

Integration ensures consistency and accuracy of financial data across different parts of your business.

Expense Monitoring and Analysis:

By regularly monitoring your expenses in SMARTBMS ERP, you can gain insights into your business's financial health and performance.

Analyze expense patterns, compare actual spending against budgeted amounts, and identify areas for cost optimization.

Use expense data to evaluate the profitability of products or services, assess the effectiveness of marketing campaigns, and allocate resources strategically.