



RETAIL

How to use Retail

A practical, module-by-module guide for your team.

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Contents

01	Platform Overview	16	Settings
02	First-Time Setup	17	Branch Management
03	Roles & Permissions	18	Audit Logs
04	Team Management	19	Notifications
05	Payroll	20	Point of Sale (POS)
06	Shifts & Clock-in	21	Inventory Management
07	Leave Management	22	Customer Management
08	Purchase Orders	23	Stocktakes
09	Expense Tracking	24	Stock Transfers
10	Accounting	25	Layaways
11	Analytics & Reports	26	Gift Cards
12	AI Chat Assistant	27	Discounts & Promotions
13	Messaging	28	Parked Carts
14	Documents	29	Suppliers
15	Workflow Automation		

01 Platform Overview

Learn what Fiap Systems is and how to navigate the platform.

What is Fiap Systems?

Fiap Systems is a production-grade, multi-tenant SaaS platform for managing businesses across eight industries: Retail, School, Hospital, Restaurant, Bakery, Hotel, Car Rental, and Event Rental. Each business type gets a specialized template with industry-specific modules, while sharing core features like team management, payroll, analytics, and multi-branch support.

- 8 business templates with specialized modules
- Multi-tenant architecture — each business is fully isolated
- Role-based access control (RBAC) with 13 role types
- Bilingual support (English & French)
- Mobile app portals for students, parents, and patients
- Dark mode and light mode with premium UI

Choosing Your Template

When your business account is created, a template is applied that determines which modules appear in your sidebar. Here are the available templates:

Template	Best For	Key Modules
Retail Store	Shops, supermarkets, general retail	POS, Inventory, Customers, Sales
Edutech System	Schools, training centers, academies	Students, Teachers, Fees, Attendance, Results, Promotions
Meditech System	Hospitals, clinics, medical centers	Patients, Doctors, Appointments, Lab Tests, Pharmacy
Restaurant	Restaurants, snack bars, cafes	Tables, Menu, Orders, Kitchen Display (KDS)
Bakery	Bakeries, pastry shops	Ingredients, Recipes, Production, Waste Tracking
Hotel / Lodge	Hotels, lodges, rental properties	Properties, Rooms, Guests, Bookings, Housekeeping
Car Rental System	Car rental agencies, chauffeur services	Fleet, Vehicles, Bookings, Rates, Maintenance, Damages
Event Management System	Event planners, rental agencies	Equipment, Packages, Quotes, Deliveries, Bookings

Navigating the Dashboard

Once logged in, you'll see your main dashboard. Here's how the interface is organized:

- 1 Sidebar Navigation**
The left sidebar contains links to all your modules. It's organized into sections relevant to your template. On mobile, tap the hamburger menu (☰) to open it.
- 2 Top Bar**
The top bar shows your business name, notification bell, theme toggle (light/dark), language switcher, and your profile menu.
- 3 Dashboard Overview**
The main dashboard displays key metrics — revenue, sales, stock alerts, and template-specific stats like today's appointments (hospital) or attendance rate (school).
- 4 Quick Actions**
Most dashboards have quick-action buttons for common tasks like 'New Sale', 'Add Product', or 'Add Customer'.

Tip: Use keyboard shortcut **Escape** to close any modal or sidebar overlay.

02 First-Time Setup

Configure your business profile, branding, and essential settings.

Logging In

- 1 Open the Login Page**
Navigate to your Fiap Systems URL. You'll see the login screen with the tagline 'Control Your Business From Anywhere'.
- 2 Enter Credentials**
Use the email and password provided by your administrator. For POS terminals, use the Quick PIN login with your Business ID and PIN code.
- 3 Select Login Method**
Toggle between 'Email & Password' (for managers/admins) and 'Quick PIN' (for cashiers/staff) using the switch at the top.

Tip: Quick PIN login is ideal for shift changes at POS terminals — it's faster than typing full credentials.

Business Profile Setup

After first login, navigate to Settings from the sidebar to configure your business:

- 1 Business Name**
Go to Settings → General. Enter your official business name. This appears on receipts, invoices, and reports.
- 2 Currency**
Select your operating currency from the dropdown. This affects all financial displays across the platform.
- 3 Timezone & Date Format**
Set your local timezone and preferred date format (DD/MM/YYYY or MM/DD/YYYY).
- 4 Logo & Branding**
Upload your business logo and set brand colors. These are used in receipts, reports, and the dashboard header.
- 5 Language**
Choose English or French. The entire interface, including labels, buttons, and notifications, will switch to your selected language.

Theme Preferences

Fiap Systems supports both light and dark modes:

- 1 Toggle Theme**
Click the sun/moon icon in the top bar to switch between light and dark mode. Your preference is saved automatically.

Note: Theme preference is stored per-browser. Each user can have their own preferred theme.

03 Roles & Permissions

Understand the role hierarchy and what each role can access.

Role Hierarchy

Fiap Systems uses Role-Based Access Control (RBAC). Each user is assigned one role that determines what they can see and do. Roles are additive — higher roles always have more permissions.

Role	Access Level	Best For
Super Admin	Full platform control across all tenants	Platform operators
Owner	Full tenant access, user management	Business owners
Admin	Almost everything, no tenant management	Senior managers
Manager	Day-to-day operations, no user management	Branch/shift managers
Staff	Limited operational — view + create, no delete	General staff
Cashier	POS-only — sales and customer viewing	POS terminal operators
Teacher	Academic access — attendance, grading, results	School teachers
Doctor	Clinical access — patients, appointments, records	Physicians
Nurse	Clinical support — vitals, lab, pharmacy	Nursing staff
Baker	Production — ingredients, recipes, batches, waste	Bakery production staff
Student	Read-only — own records, fees, attendance	Students (portal)
Parent	Read-only — child's data, can make fee payments	Parents (portal)
Patient	Read-only — own records, appointments, bills	Patients (portal)

Permission Format

Permissions follow the pattern module:action. For example: customers:create, inventory:view, sales:delete. Medical modules use a three-part format: medical:patients:create.

Warning: Only Owner and Admin roles can create, edit, or delete other users. Managers and below cannot manage team members.

Template-Specific Roles

Some roles are only relevant for specific templates:

- Teacher, Student, Parent — Edutech template only
- Doctor, Nurse, Patient — Meditech template only
- Baker — Bakery template only
- Cashier — Available in Retail, Restaurant, and Bakery

Tip: When adding a team member, only roles relevant to your current template are shown in the dropdown.

04 Team Management

Add, manage, and configure your team members with roles and payroll.

Adding Team Members

Navigate to Team from the sidebar to manage your staff. The team page shows all members with their roles, status, and branch assignments.

- 1 Click 'Add Employee'**
Click the 'Add Employee' button at the top right of the team page.
- 2 Fill Basic Info**
Enter the member's full name and email address. The email will be used for login credentials.
- 3 Assign a Role**
Select the appropriate role from the dropdown (Owner, Admin, Manager, Staff, Cashier, or template-specific roles like Teacher, Doctor, Baker).
- 4 Set Password**
Enter a temporary password. The member can change this after first login.
- 5 Configure Salary (Optional)**
Enter the base salary amount. This links directly to the payroll system.
- 6 Set Quick PIN (Optional)**
Assign a 4-6 digit PIN for fast POS terminal access. Ideal for Cashier and Staff roles.
- 7 Assign Branch**
If you have multiple branches, select which branch this member belongs to.

Tip: For POS staff, always set up both email/password AND a Quick PIN. The PIN allows fast shift changes without full credential entry.

Managing Existing Members

- 1 View Team Directory**
The team page shows all members in a searchable, filterable table. Use the search bar to find by name or email.
- 2 Filter by Role or Branch**
Use the dropdown filters to show only specific roles (e.g., all Managers) or members at a specific branch.
- 3 Edit a Member**
Click the edit icon on any row to update their details — name, email, role, salary, or branch assignment.
- 4 Reset Password**
Click the three-dot menu → Reset Password to set a new temporary password for a member.
- 5 Deactivate a Member**
Click the three-dot menu → Deactivate to prevent a member from logging in without deleting their record.

Warning: You cannot deactivate your own account or accounts with a role equal to or higher than yours.

Payroll Configuration

Each team member's salary is configured from their profile and feeds directly into the payroll system:

- Base Salary — The gross monthly salary amount
- Tax Percentage — Withholding tax rate applied to gross
- Employer Contribution — Additional employer social contributions
- Bank Details — Bank name and account number for payslips
- Allowances — Additional allowances added on top of base salary

Note: Changes to salary configuration take effect on the next payroll run. Past payroll records remain unchanged.

05 Payroll

Run monthly payroll, generate payslips, and track payment history.

Payroll Overview

The payroll module lets you process monthly salaries for all team members with configured salary data. Navigate to the Payroll page from the sidebar.

- Monthly payroll processing with automatic calculations
- Tax withholding and employer contributions
- Individual payslip generation and printing
- Monthly payroll report with totals
- Automatic expense tracking (payroll expenses auto-logged)

Running Payroll

- 1 Navigate to Payroll**
Click 'Payroll' in the sidebar. You'll see the payroll dashboard with summary stats: employees with salary, estimated monthly gross, and latest run status.
- 2 Select Month & Year**
Use the month and year selectors to choose the pay period you want to process.
- 3 Click 'Run Payroll'**
Click the 'Run Payroll' button. The system calculates gross salary, tax deductions, employer contributions, and net pay for each employee.
- 4 Review the Breakdown**
A detailed table appears showing each employee's gross, tax, social contributions, total deductions, and net pay.
- 5 Mark as Paid**
Once payments are made, click 'Mark as Paid' to finalize the payroll run. This action cannot be undone.

Warning: Ensure all employee salary data is up-to-date before running payroll. Changes after the run won't retroactively update.

Payslips

Generate and print individual payslips for any employee from a completed payroll run:

- 1 Open Payroll Details**
Click 'View Details' on any completed payroll run to see the full breakdown.
- 2 Click 'Payslip'**
Click the 'Payslip' button next to any employee's row.
- 3 Print or Save**
The payslip opens in a print-friendly format. Use Ctrl+P (or Cmd+P on Mac) to print or save as PDF.

Tip: Use 'Print Monthly Report' to generate a summary report of all employees for the selected month — great for accounting records.

06 Shifts & Clock-in

Schedule staff shifts, track clock-in and clock-out times, manage shift swaps, and monitor attendance in real time.

Overview

The Shifts & Clock-in module gives you full control over employee scheduling and time tracking. Create recurring or one-off shifts, allow employees to clock in and out from their devices, and review attendance data at a glance. Managers can approve shift swaps and monitor real-time coverage to ensure every position is staffed.

- Create and publish weekly or monthly shift schedules
- Real-time clock-in and clock-out tracking with timestamps
- Shift swap requests with manager approval workflow
- Overtime detection and automatic alerts
- Attendance dashboard with daily, weekly, and monthly views
- Break tracking and compliance with labor regulations
- Export attendance reports for payroll integration

Tip: Publish shift schedules at least one week in advance so employees have time to request swaps if needed.

Creating a Shift Schedule

Build shift schedules for your teams by assigning employees to specific time slots. You can create individual shifts or use templates for recurring patterns.

- 1 Open the Shifts module**
Navigate to Human Resources → Shifts & Clock-in from the main menu.
- 2 Select the schedule period**
Choose the week or month you want to schedule using the date picker at the top of the calendar view.
- 3 Add a new shift**
Click 'Add Shift' and select the employee, date, start time, end time, and assigned role or position.
- 4 Use templates for recurring shifts**
Click 'Apply Template' to load a saved schedule pattern. Templates can cover an entire week and be reused across periods.
- 5 Publish the schedule**
Once all shifts are assigned, click 'Publish' to notify employees of their upcoming schedule via email or in-app notification.

Note: Unpublished schedules are only visible to managers. Employees will not see their shifts until the schedule is published.

Clock-in & Clock-out

Employees can record their working hours by clocking in at the start of a shift and clocking out when it ends. The system captures exact timestamps for accurate attendance records.

- 1 Clock in**
On the employee dashboard, click the 'Clock In' button when starting your shift. The system records the exact time and marks you as present.
- 2 Start and end breaks**
Use the 'Start Break' and 'End Break' buttons to log break periods. Break time is tracked separately from working hours.
- 3 Clock out**
Click 'Clock Out' at the end of your shift. The total hours worked, including any breaks, are calculated automatically.
- 4 Review your timesheet**
Visit the 'My Timesheet' section to see a summary of all your clock-in and clock-out records for the current pay period.

Warning: If an employee forgets to clock out, a manager must manually close the shift. Unclosed shifts are flagged in the attendance report.

Managing Shift Swaps

Employees can request to swap shifts with a colleague. The swap must be approved by a manager to ensure proper coverage and compliance with scheduling rules.

1 Request a swap

From your schedule view, click on the shift you want to swap and select 'Request Swap'. Choose an available colleague to swap with.

2 Colleague accepts or declines

The colleague receives a notification and can accept or decline the swap request from their dashboard.

3 Manager approval

Once the colleague accepts, the swap request goes to the manager for final approval. The manager reviews coverage and approves or rejects the swap.

4 Schedule updates automatically

Upon approval, both employees' schedules are updated automatically and notifications are sent to confirm the change.

Tip: Encourage employees to request swaps at least 48 hours before the shift to give managers time to review and ensure adequate staffing.

07 Leave Management

Handle leave requests, approval workflows, leave balances, and different leave types including annual, sick, and personal leave.

Overview

The Leave Management module streamlines how your organization handles employee time off. Employees can submit leave requests directly from their dashboard, managers receive instant notifications for approval, and HR can track leave balances and accruals across the entire company. The system supports multiple leave types and enforces your organization's leave policies automatically.

- Submit and track leave requests with real-time status updates
- Configurable leave types: annual, sick, personal, maternity, paternity, and custom
- Automatic leave balance calculation and accrual tracking
- Multi-level approval workflow with delegation support
- Team calendar showing who is on leave at any given time
- Leave policy enforcement with blackout dates and minimum notice periods
- Carry-over rules for unused leave at year end
- Exportable leave reports for compliance and payroll

Tip: Set up leave policies and types before the start of the fiscal year so that balances are calculated correctly from day one.

Configuring Leave Types

Before employees can request time off, administrators must configure the leave types available in the organization. Each type can have its own accrual rules, balance limits, and approval requirements.

- 1 Navigate to Leave Settings**
Go to Human Resources → Leave Management → Settings to access the leave configuration panel.
- 2 Add a new leave type**
Click 'Add Leave Type' and enter the name (e.g., Annual Leave, Sick Leave), the annual entitlement in days or hours, and whether it requires documentation.
- 3 Set accrual rules**
Choose how leave is accrued: all at once at the start of the year, monthly, or per pay period. Configure carry-over limits for unused days.
- 4 Define approval workflow**
Specify who approves requests for this leave type. Options include direct manager, HR manager, or a custom approval chain.
- 5 Save and activate**
Click 'Save' to activate the leave type. It will immediately be available for employees to select when submitting requests.

Note: You can deactivate a leave type at any time without deleting it. Existing requests with that type will remain in the system.

Submitting a Leave Request

Employees can request time off in just a few clicks. The system checks balances automatically and routes the request through the configured approval workflow.

- 1 Open the Leave Request form**
From your dashboard, click 'Request Leave' or navigate to Human Resources → Leave Management → New Request.
- 2 Select the leave type**
Choose the type of leave from the dropdown (e.g., Annual Leave, Sick Leave). Your remaining balance for that type is displayed.
- 3 Choose the dates**
Select the start and end dates for your leave. The system calculates the number of working days, excluding weekends and public holidays.
- 4 Add a reason or attachment**
Optionally provide a reason for the leave and attach supporting documents such as a medical certificate if required.
- 5 Submit the request**
Click 'Submit' to send the request to your approver. You will receive a notification when the request is approved or declined.

Warning: Submitting a leave request does not guarantee approval. Do not make travel plans until your request has been officially approved.

Managers and HR personnel can review, approve, or reject leave requests from a centralized queue. The team calendar helps identify potential coverage gaps before approving.

1 Review pending requests

Go to Leave Management → Pending Approvals to see all requests awaiting your decision. Each request shows the employee, dates, leave type, and remaining balance.

2 Check the team calendar

Click 'Team Calendar' to see an overview of who else is on leave during the same period. This helps ensure adequate team coverage.

3 Approve or reject

Click 'Approve' or 'Reject' on each request. If rejecting, provide a reason so the employee understands why.

4 Monitor balances

Use the 'Leave Balances' report to view all employees' remaining leave days by type. This report can be filtered by department or team.

Tip: Use the team calendar view regularly to anticipate periods of low staffing and plan accordingly.

08 Purchase Orders

Create purchase orders for suppliers, track order status through fulfillment, and manage goods receiving with full audit trails.

Overview

The Purchase Orders module manages your entire procurement process from requisition to receiving. Create purchase orders for your suppliers, track order status in real time, and record goods received against each order. The system maintains a full audit trail of every change and integrates seamlessly with your inventory and accounting modules.

- Create and send purchase orders to suppliers with itemized line details
- Track order status: Draft, Sent, Partially Received, Fully Received, Cancelled
- Goods receiving with quantity verification and quality notes
- Automatic inventory updates when goods are received
- Supplier management with contact details and order history
- Purchase order approval workflow for budget control
- PDF generation and email delivery of purchase orders to suppliers
- Integration with accounting for automatic expense recording

Tip: Link your supplier catalog to the Purchase Orders module so that item details, prices, and lead times auto-populate when creating new orders.

Creating a Purchase Order

Start the procurement process by creating a purchase order that specifies the items, quantities, and prices you need from a supplier.

- 1 Open the Purchase Orders module**
Navigate to Supply Chain → Purchase Orders from the main menu.
- 2 Click 'New Purchase Order'**
Start a new PO. Select the supplier from your supplier list or create a new supplier record on the spot.
- 3 Add line items**
Add each product or material you want to order. Specify the item name, SKU, quantity, unit price, and any applicable tax or discount.
- 4 Set delivery details**
Enter the expected delivery date, shipping address, and any special delivery instructions for the supplier.
- 5 Submit for approval**
If your organization requires PO approval, click 'Submit for Approval'. Otherwise, click 'Confirm' to finalize and send the PO directly to the supplier.

Note: Purchase orders in Draft status can be edited freely. Once a PO is Confirmed or Sent, changes require creating an amendment.

Receiving Goods

When a shipment arrives from a supplier, record it against the corresponding purchase order. The system supports partial receipts for orders that arrive in multiple shipments.

- 1 Locate the purchase order**
Go to Purchase Orders and find the PO you are receiving goods for. You can search by PO number, supplier name, or date.
- 2 Click 'Receive Goods'**
Open the receiving form for the PO. Each line item is listed with the ordered quantity and any previously received quantity.
- 3 Enter received quantities**
For each line item, enter the quantity actually received. If any items are damaged or missing, note the discrepancy in the comments field.
- 4 Confirm receipt**
Click 'Confirm Receipt' to update the PO status. Inventory levels are updated automatically, and the PO moves to Partially Received or Fully Received.

Warning: Always verify quantities physically before confirming receipt in the system. Confirmed receipts update inventory balances immediately and cannot be easily reversed.

Tracking and Reporting

Monitor all purchase orders across their lifecycle and generate reports to analyze procurement spend and supplier performance.

- 1 Use the PO dashboard**
The Purchase Orders dashboard shows all orders organized by status. Use filters to view orders by supplier, date range, or amount.
- 2 View order history**
Click on any PO to see its full history including creation, approval, sending, and receiving events with timestamps.
- 3 Generate procurement reports**
Go to Reports → Procurement to generate spend analysis by supplier, category, or time period. Identify your top suppliers and spending trends.

Tip: Review the 'Open Purchase Orders' report weekly to follow up on overdue deliveries and keep your supply chain running smoothly.

09 Expense Tracking

Record, categorize, and report on all business expenses.

Recording Expenses

- 1 Navigate to Expenses**
Click 'Expenses' in the sidebar.
- 2 Click 'Add Expense'**
Enter the amount, date, category, vendor name, and optional description.
- 3 Select Category**
Choose from: Rent, Utilities, Salary, Payroll, Operations, Supplies, Transport, Marketing, Maintenance, Taxes, Insurance, or Other.
- 4 Save**
The expense is recorded and appears in the expense table and analytics.

Note: Payroll expenses are automatically generated when you run payroll — no need to enter them manually.

Expense Reports

- View total expenses by period (daily, weekly, monthly, yearly)
- Category breakdown with percentages
- Filter by category, date range, or vendor
- Export expense data to CSV for accounting

10 Accounting

Manage your chart of accounts, record journal entries, maintain the general ledger, and ensure accurate double-entry bookkeeping.

Overview

The Accounting module is the financial backbone of your organization. It provides a complete double-entry bookkeeping system with a customizable chart of accounts, journal entries, and a general ledger. Every financial transaction across the platform — from invoices to expenses to payroll — flows into the accounting module, giving you a single source of truth for your financial data.

- Customizable chart of accounts organized by category (assets, liabilities, equity, revenue, expenses)
- Double-entry journal entries with automatic balancing validation
- General ledger with drill-down to individual transactions
- Trial balance, income statement, and balance sheet generation
- Multi-currency support with automatic exchange rate conversion
- Fiscal year and period management with period locking
- Automated entries from sales, purchases, payroll, and expenses
- Audit trail for every financial transaction

Warning: Accounting data affects financial reporting and tax compliance. Ensure that only authorized users have access to create or modify journal entries.

Setting Up the Chart of Accounts

The chart of accounts defines the structure of your financial records. Set it up carefully as it forms the foundation for all financial reporting.

- 1 Access the Chart of Accounts**
Navigate to Finance → Accounting → Chart of Accounts to view and manage your account structure.
- 2 Review default accounts**
The system comes with a standard chart of accounts. Review each account to ensure it fits your business structure. Common categories include Cash, Accounts Receivable, Inventory, Revenue, and Cost of Goods Sold.
- 3 Add custom accounts**
Click 'Add Account' to create a new account. Specify the account code, name, type (asset, liability, equity, revenue, or expense), and parent account if applicable.
- 4 Organize account hierarchy**
Arrange accounts in a logical hierarchy using parent-child relationships. This makes financial reports easier to read and analyze.
- 5 Set opening balances**
For existing businesses, enter opening balances for each account as of your go-live date. This ensures your ledger starts with accurate figures.

Tip: Use a consistent numbering scheme for account codes (e.g., 1000s for assets, 2000s for liabilities, 3000s for equity, 4000s for revenue, 5000s for expenses) to keep your chart organized.

Recording Journal Entries

Journal entries are the building blocks of double-entry bookkeeping. Every transaction is recorded as a balanced entry with equal debits and credits.

- 1 Create a new journal entry**
Go to Accounting → Journal Entries → New Entry. Enter the date, a descriptive reference or memo, and select the journal (e.g., General, Sales, Purchases).
- 2 Add debit and credit lines**
For each line, select the account, enter the amount, and specify whether it is a debit or credit. The total debits must equal total credits for the entry to be valid.
- 3 Attach supporting documents**
Upload receipts, invoices, or other documentation to support the journal entry. This helps during audits and reviews.
- 4 Post the entry**
Click 'Post' to record the entry in the general ledger. Posted entries update account balances immediately.

Note: Many journal entries are created automatically by other modules. For example, confirming a sale creates a revenue entry, and recording an expense creates an expense entry. Manual journal entries are typically used for adjustments, corrections, and non-routine transactions.

Automated Ledger Sync

The Accounting module is seamlessly integrated with all operational modules. When financial transactions occur across the platform, the Ledger Sync engine automatically posts balanced double-entry journal entries in real time.

- 1 Sales & POS**
Completing a sale automatically debits Cash and credits Sales Revenue. Refunds reverse this entry automatically.
- 2 Expenses**
Creating an expense debits the specific expense category account (e.g., Rent, Utilities) and credits Cash.
- 3 Rentals & Bookings**
Checking out a car rental, event equipment, or property booking debits Cash and credits Service Revenue.
- 4 School Fees**
Recording a fee payment from a student automatically debits Cash and credits Fee Revenue.

Tip: Automated entries contain a reference link back to the original operational record (e.g., the specific Sale or Booking ID) for easy auditing.

Financial Reports

Generate essential financial reports to understand your business's financial position and performance at any point in time.

- 1 Generate a Trial Balance**
Go to Reports → Trial Balance to see a summary of all account balances. Use this to verify that total debits equal total credits across the ledger.
- 2 View the Income Statement**
Navigate to Reports → Income Statement (Profit & Loss) to see revenue and expenses for a selected period. This shows whether your business is profitable.
- 3 Review the Balance Sheet**
Go to Reports → Balance Sheet to see a snapshot of assets, liabilities, and equity at a specific date. This shows your company's financial position.
- 4 Drill down into accounts**
Click on any account in a report to see the individual transactions that make up the balance. This is useful for investigating discrepancies.

Tip: Close each fiscal period after reconciliation to prevent accidental posting. Locked periods protect the integrity of your historical financial data.

11 Analytics & Reports

View dashboards, financial summaries, and export business data.

Dashboard Analytics

The Analytics page provides visual charts and summaries of your business performance:

- Revenue trend — line chart showing daily/weekly/monthly revenue
- Top selling products — ranked list with quantities sold
- Sales by category — pie/bar chart breakdown
- Expense distribution — category-wise expense breakdown
- Monthly financial data — detailed table with revenue, expenses, and net income
- Payroll breakdown — gross salary, deductions, and net paid by month

Exporting Data

- 1 Navigate to Analytics**
Click 'Analytics' in the sidebar to view all reports.
- 2 Select Period**
Use the date range picker to choose the reporting period.
- 3 Export**
Click the 'Export' button to download data as CSV. Available for sales, inventory, expenses, and payroll.

Tip: Use the 'All Time' period selector for a complete business overview.

12 AI Chat Assistant

Ask questions in plain language and let the assistant act on your business data: look things up, draft purchase orders, create records, and more.

Overview

The AI Chat Assistant is agentic, not just a Q&A bot. Ask it a question in plain language and it retrieves the answer from your data; ask it to do something and, within your role's permissions, it can actually do it by calling the same backend the rest of the platform uses. It ships with dozens of domain-specific tool files, one per business area (inventory, purchase orders, customers, sales, HR, leave requests, students, patients, and every other module in your template), so its reach follows whatever modules your business template enables.

- Natural language queries about sales, inventory, finances, and operations
- Takes real action, not just answers: creates customer records, drafts purchase orders, adjusts stock levels, and more
- Dozens of domain-specific tools covering every module your business template enables, not a fixed generic set
- Multi-turn tool use: it can chain several lookups or actions together to satisfy one request
- Context-aware starter suggestions based on your business type
- Full conversation history, saved per user and browsable from the sidebar
- Restricted to Owner, Admin, and Super Admin roles
- Every tool call is scoped to your own organization's data and enforced by the same role-based permission checks used on every other page

Tip: Be specific, including exact names, IDs, or amounts, especially when asking the assistant to create or change something, so it acts on the right record.

Asking and Instructing

Start a conversation with the assistant by typing a question or an instruction in natural language. It interprets your intent, and either retrieves data or carries out the requested action through the platform's normal backend.

- 1 Open AI Chat**
Click 'AI Chat' in the sidebar. It's only visible to Owner, Admin, and Super Admin roles; other roles won't see it listed.
- 2 Type your request**
Enter a question like 'Show me total revenue for last quarter,' or an instruction like 'Add a new customer named Jane Doe' or 'Create a purchase order for 20 units of Product X from Supplier Y.'
- 3 Review the response**
The assistant replies in your interface language (English or French). If it took an action, the change is immediately reflected in the relevant module, such as the new customer appearing in Customers.
- 4 Continue the conversation**
Ask follow-ups to refine results, or click 'New Chat' to start fresh. Past conversations are listed on the left and can be reopened or deleted at any time.

Note: The assistant only accesses data your role can already see, and it's blocked from any action your role couldn't already perform directly. If AI Chat isn't enabled for your plan, you'll see an upgrade prompt instead of the chat.

What It Can Do

Beyond answering questions, the assistant can carry out tasks across the modules enabled for your business. A few grounded examples:

- Data lookups: 'How many units of Product X are in stock?'
- Aggregations and summaries: 'What was our total revenue last month?'
- Creating records: 'Add a new customer named Jane Doe, phone 6xx xxx xxx'
- Drafting purchase orders: 'Create a purchase order for Supplier Y for 50 units of Product X'
- Updating inventory: 'Add 20 units to the stock of Product X'
- Cross-module questions that pull from more than one module in the same answer, such as sales alongside expenses
- Whatever the tool set for your business template covers, from students and attendance in a school to patients and appointments in a hospital

Tip: After the assistant creates or changes something, check the result in the relevant module (Inventory, Customers, Purchase Orders, and so on) to confirm it matches what you intended.

Get reliable results from the AI Chat Assistant by following these guidelines.

- Start with specific, well-defined requests rather than vague ones
- Include exact names, IDs, or time periods so the assistant acts on or reports the right data
- Use follow-up messages to refine or drill deeper instead of one long, complex request
- Verify anything the assistant creates or changes in the relevant module afterward
- Remember only Owner, Admin, and Super Admin roles can access AI Chat
- If AI Chat isn't available to you, ask your Owner or Admin. Availability depends on your plan

Warning: The assistant can create and modify real records in your business, not just report on them. Review its actions the same way you would review a teammate's work, especially for anything financial or customer-facing.

13 Messaging

Communicate with your team through internal messaging, manage conversations, and share files securely within your organization.

Overview

The Messaging module provides a built-in communication hub for your organization. Send direct messages to colleagues, create group conversations for teams or projects, and share files without leaving the platform. All messages are stored securely within your tenant and are searchable, making it easy to find past conversations and shared information.

- One-on-one direct messaging between team members
- Group conversations for teams, departments, or projects
- File sharing with drag-and-drop support for documents, images, and more
- Real-time message delivery with read receipts
- Message search across all conversations
- Rich text formatting with mentions and links
- Notification preferences for managing message alerts
- Message pinning and bookmarking for important information

Tip: Use group conversations for project-specific communication to keep discussions organized and easily accessible to all team members involved.

Sending Messages

Start communicating with your team by sending direct messages or creating group conversations. The messaging interface is designed for quick, efficient communication.

- 1 Open the Messaging module**
Click the Messaging icon in the sidebar to open the messaging panel. Your recent conversations are displayed on the left.
- 2 Start a new conversation**
Click 'New Message' and select one or more recipients from your organization's directory. For a group conversation, add multiple people.
- 3 Type and send your message**
Compose your message in the text field. Use @mentions to tag specific people, and formatting options for bold, italic, or bullet lists. Press Enter or click Send.
- 4 Share files**
Drag and drop files into the conversation or click the attachment icon to upload documents, images, or other files. Shared files are accessible to all conversation participants.

Note: Messages are delivered in real time. If a recipient is offline, they will see the message and a notification badge when they next log in.

Managing Conversations

Keep your messaging organized by managing conversations, pinning important messages, and adjusting your notification settings.

- 1 Pin important messages**
Hover over a message and click the pin icon to pin it to the top of the conversation. Pinned messages are visible to all participants and serve as quick references.
- 2 Search past conversations**
Use the search bar at the top of the messaging panel to find messages by keyword, sender, or date. Results are displayed with context so you can jump directly to the relevant conversation.
- 3 Manage notifications**
Right-click on a conversation and select 'Notification Settings' to mute, set to priority, or customize how you receive alerts for that conversation.
- 4 Archive old conversations**
Archive conversations you no longer need in your active list. Archived conversations can be found in the 'Archived' section and restored at any time.

Tip: Use the bookmark feature to save individual messages you want to revisit later. Access all your bookmarks from the 'Saved Messages' section.

14 Documents

Upload, organize, and manage business documents with folder structures, tagging, version control, and secure sharing.

Overview

The Documents module serves as your organization's central file repository. Upload and organize business documents in a structured folder hierarchy, tag files for easy discovery, and control access with granular permissions. The module supports version control so you always have access to previous versions of important files, and it integrates with other modules to attach documents directly to records like invoices, employees, or projects.

- Upload files of any type with drag-and-drop support
- Folder-based organization with unlimited nesting levels
- Tagging system for cross-cutting file categorization
- Full-text search across document names, tags, and content
- Version history with the ability to restore previous versions
- Access control with view, edit, and admin permissions per folder or file
- Document preview for common file types (PDF, images, Office documents)
- Integration with other modules for attaching files to records

Tip: Establish a clear folder structure and naming convention before your team starts uploading files. This makes documents easier to find as your repository grows.

Uploading and Organizing Files

Add files to the document repository and organize them into folders for easy access. The system handles files of any type and size within your plan's storage limits.

- 1 Navigate to Documents**
Click on Documents in the sidebar to open the document manager. You'll see the root folder structure and any recently accessed files.
- 2 Create folders**
Click 'New Folder' to create a folder. Name it descriptively (e.g., 'Contracts', 'HR Documents', 'Financial Reports') and choose its location in the hierarchy.
- 3 Upload files**
Click 'Upload' or drag and drop files directly into the current folder. Multiple files can be uploaded simultaneously. A progress bar shows the upload status.
- 4 Add tags to files**
Select a file and click 'Add Tags' to assign descriptive tags (e.g., '2025', 'Legal', 'Approved'). Tags make files discoverable through search regardless of folder location.
- 5 Move or copy files**
Right-click a file and select 'Move' or 'Copy' to reorganize files between folders. Moving a file updates its location; copying creates a duplicate.

Note: Supported file previews include PDF, JPEG, PNG, GIF, Word, Excel, and PowerPoint files. Other file types can be downloaded for viewing in external applications.

Version Control

Keep track of document changes with automatic version history. Every time a file is updated, the previous version is preserved and can be restored if needed.

- 1 Upload a new version**
Select an existing file and click 'Upload New Version'. Choose the updated file from your computer. The system replaces the current version and archives the old one.
- 2 View version history**
Click on a file and select 'Version History' to see all previous versions with timestamps and the name of the user who uploaded each version.
- 3 Restore a previous version**
In the version history, click 'Restore' next to any previous version to make it the current active version. The previously active version is archived.
- 4 Compare versions**
For text-based documents, use the 'Compare' feature to see differences between two versions highlighted side by side.

Sharing and Permissions

Control who can access, view, and edit documents with flexible permission settings at both the folder and file level.

- 1 Set folder permissions**
Right-click a folder and select 'Permissions'. Assign View, Edit, or Admin access to specific users, roles, or departments. Permissions cascade to all files within the folder.
- 2 Override file-level permissions**
For sensitive files, you can set permissions directly on individual files that override the parent folder's settings.
- 3 Share a file link**
Click 'Share' on a file to generate a secure link. Configure whether the link requires authentication or can be accessed by anyone with the link, and set an expiration date.

Tip: Use role-based folder permissions for broad access control and file-level overrides only for exceptions. This keeps your permissions manageable as the team grows.

15 Workflow Automation

Create rules that fire automatically on business events, checking conditions and running actions without manual intervention.

Overview

Workflow Automation lets you define rules that run automatically when something happens in the business, a sale is made, stock runs low, a leave request is rejected, and so on. Each rule has a trigger event, optional conditions, and one or more actions. There is no visual drag-and-drop builder, rules are configured through a form with a fixed list of trigger events and JSON-based conditions and actions, which keeps them precise and predictable.

- Fixed list of real trigger events across sales, fees, appointments, lab results, inventory, leave, patients, purchase orders, payroll, and student records
- Conditions with operators: equals, not equals, greater than, greater or equal, less than, less or equal, contains, in
- Actions: in-app notification, WhatsApp message, create expense, post a journal entry, draft a purchase order, create a follow-up task, update a field on the record, or call an external webhook
- Priority ordering, and an enable/disable toggle per rule
- Run count and last-run timestamp shown on every rule
- A run log tab with the result and execution time of every firing

Tip: Start with one trigger and one simple action, confirm it fires correctly in the Run Logs tab, then add conditions or more actions.

Creating a Rule

Rules live under Workflow in the sidebar, on the Rules tab.

- 1 Open Workflow**
Click 'Workflow' in the sidebar. The Rules tab lists existing rules with their active/inactive status, priority, run count, and condition/action counts.
- 2 Click 'New Rule'**
Give the rule a name and optional description.
- 3 Pick the trigger event**
Choose from the fixed list, for example `sale.created`, `inventory.low_stock`, `fee.overdue`, `appointment.no_show`, `leave.requested`, `patient.discharged`, `purchase_order.received`, or `student.fee_overdue`.
- 4 Set a priority**
A number controlling the order rules run in when more than one matches the same event.
- 5 Write the conditions (optional)**
Enter a JSON array of conditions, for example `[{"field": "amount", "operator": ">", "value": 1000}]`. Leave it empty for the rule to always fire on the trigger event.
- 6 Write the actions**
Enter a JSON array of actions, for example `[{"type": "notify", "title": "Alert", "message": "Sale of {{amount}}"}]`. This field is required, invalid JSON is rejected before saving.
- 7 Save**
The rule becomes active immediately unless you leave the Active checkbox unticked.

Warning: Conditions and actions are entered as raw JSON, a malformed action array will be rejected on save rather than silently ignored, double-check the syntax before saving.

Managing Rules

- Toggle a rule active or inactive with one click, without deleting it
- Click 'Details' on a rule to see its conditions and actions as formatted JSON
- Edit a rule to change its trigger, conditions, actions, or priority
- Delete a rule permanently (a confirmation prompt appears first)
- The stats bar at the top shows total rules, active rules, total runs, and overall success rate

Run Logs

Switch to the Run Logs tab to see every time a rule has fired.

- Each row shows the rule name, the trigger event, the result (success, failed, or skipped), the execution time in milliseconds, any error message, and the timestamp
 - Use this tab to confirm a new rule actually fires, and to diagnose a rule that isn't producing the expected notification or record
-

16 Settings

Configure business profile, branding, and system preferences.

Settings Configuration

- Business name and profile information
 - Currency selection (affects all financial displays)
 - Timezone and date format
 - Language (English/French)
 - Theme (Light/Dark mode)
 - Logo and branding colors
 - Feature toggles (analytics, audit, websocket)
 - Notification preferences
 - Danger zone: reset to defaults
-

17 Branch Management

Set up and manage multiple business locations.

Managing Branches

- 1 Add Branch**
Branches → Add Branch. Enter name, location, and assign a manager.
 - 2 Assign Staff**
When adding/editing team members, select their branch from the dropdown.
 - 3 Branch Filtering**
Use branch filters on team, sales, and inventory pages to view location-specific data.
-

18 Audit Logs

Track all system activity and changes.

Viewing Audit Logs

Navigate to Audit Log from the sidebar. Every action in the system is recorded:

- User who performed the action
- Action type (CREATE, UPDATE, DELETE)
- Entity affected (Product, Sale, Patient, etc.)
- Timestamp
- IP address
- Before/after data changes

19 Notifications

View and manage system alerts and notifications.

Notification Types

- Low stock alerts when inventory drops below threshold
- New sale confirmations
- Payment received notifications
- Appointment reminders (Hospital)
- Fee due reminders (School)
- Lab results ready (Hospital)
- Suspicious activity alerts

Managing Notifications

- 1 View Notifications**
Click the bell icon in the top bar to see recent notifications.
- 2 Mark as Read**
Click individual notifications or use 'Mark All as Read'.
- 3 Notification Page**
Navigate to Notifications in sidebar for full history with filters.

20 Point of Sale (POS)

Process sales, manage the checkout flow, and print receipts.

Making a Sale

- 1 Open POS**
Click 'Sales (POS)' in the sidebar to open the point-of-sale terminal.
- 2 Add Items**
Search products by name or scan a barcode. Click a product to add it to the cart.
- 3 Adjust Quantities**
Use the +/- buttons on each cart item to change quantity. Click the trash icon to remove.
- 4 Apply Discount**
Enter a discount percentage or fixed amount for the entire order.
- 5 Select Customer (Optional)**
Assign the sale to a registered customer for tracking purchase history.
- 6 Choose Payment Method**
Select Cash, Card, Mobile Money, or Bank Transfer.
- 7 Complete Sale**
Click 'Complete Sale'. Enter amount received for cash payments to calculate change.

Tip: Press Escape to close the sale confirmation dialog after completion.

Till (Cash-Drawer) Sessions

POS shows an optional till status chip next to the cart. It tracks a starting cash float so you can reconcile the drawer at the end of a shift; it never blocks checkout.

- 1 Open a Till**
Click 'Open Till' on the chip, enter the opening cash float, and confirm. The chip then shows the float amount and the time it was opened.
- 2 Close a Till**
Click 'Close Till' on the chip, count the cash drawer, and enter the counted amount. The system compares it to expected cash and shows any variance.
- 3 Print a Z-Report**
After closing, print the session report showing sales count, totals by payment method, refunds, and expected cash for the shift.

Tip: The till chip is informational only. Sales work with or without an open till session.

Receipts

After completing a sale, you can print or view the receipt:

- Auto-generated receipt with business name, items, totals, and payment method
- Configurable receipt header message (set in Settings)
- Print via browser print dialog (Ctrl+P)
- Receipt shows served-by staff member name

Sales History

View all past transactions from the Sales page:

- 1 View Transactions**
The sales table shows date, customer, items, total, payment method, and cashier for each sale.
- 2 Filter & Search**
Filter by date range, payment method, or customer. Search by receipt number.
- 3 Daily Summary**
Dashboard cards show Today's Sales count and Total Revenue at a glance.

21 Inventory Management

Add products, manage stock levels, and track inventory across your business.

Adding Products

Navigate to Inventory from the sidebar. Click 'Add Product' to create a new item.

- 1 Product Name & SKU**
Enter the product name and optional SKU code. SKU helps identify items quickly in POS.
- 2 Set Prices**
Enter Cost Price (your purchase cost) and Selling Price (customer-facing price).
- 3 Category**
Assign a category to organize your inventory (e.g., Electronics, Food, Supplies).
- 4 Stock Quantity**
Enter the initial stock count. Set a Low Stock Threshold to receive alerts.
- 5 Barcode (Optional)**
Enter or scan a barcode. This enables barcode scanning at POS for faster checkout.
- 6 Measurement Unit**
Choose the unit type: pieces, kg, liters, etc.

Tip: Use barcode scanning to speed up stock lookups. The system recognizes existing barcodes and auto-fills product info.

Stock Management

- 1 View Stock Levels**
The inventory table shows current stock, selling price, and status (In Stock, Low Stock, Out of Stock) for all products.
- 2 Adjust Stock**
Click any product → 'Adjust Stock'. Choose Add (+), Subtract (-), or Set (=) and enter the quantity with an optional reason.
- 3 Low Stock Alerts**
Products below their threshold appear with a warning badge. Notifications are sent automatically.

Warning: Stock adjustments are logged in the Audit Log. Always provide a reason for manual adjustments for accountability.

Note: For perishable or lot-controlled stock, use the separate Batch Inventory (FIFO) page to record batch numbers and expiry dates. See the Batch Inventory guide.

Search & Filter

- Search by product name, SKU, or barcode
- Filter by category
- Filter by stock status (All, In Stock, Low Stock, Out of Stock)
- Sort by name, price, or stock level
- Export inventory data to CSV

22 Customer Management

Build and manage your customer database for sales tracking and loyalty.

Adding Customers

- 1 Navigate to Customers**
Click 'Customers' in the sidebar.
- 2 Click 'Add Customer'**
Fill in name, email, phone, and address. Only name is required.
- 3 Save**
The customer appears in the directory and can be selected during POS sales.

Tip: Linking sales to customers lets you track purchase history, total spending, and last visit date.

Customer Directory

- Searchable table with name, email, phone, total purchases, and last visit
- Click any customer to view their full profile and purchase history
- Edit or delete customers from the action menu
- Filter by status (active/inactive)

23 Stocktakes

Count your physical stock, compare it to the system, and reconcile any differences.

What a Stocktake Does

A stocktake is a physical count of the items you actually have on your shelves, checked against what the system thinks you have. It helps you catch missing stock, miscounts, or theft, and keeps your inventory numbers honest.

- Records a full physical count for a branch
- Compares the counted amount to the system amount
- Highlights the difference (variance) for each item
- Keeps a numbered history of every count you run

Starting a Stocktake

Open Stocktakes from the sidebar. The page shows totals at the top: how many stocktakes you have, how many are still in progress, and how many are completed.

- 1 Click 'New Stocktake'**
Use the button at the top right to open the start form.
- 2 Choose Blind Mode (Optional)**
Tick 'Blind mode' if you want the people counting to enter quantities without seeing the system numbers. This keeps the count unbiased and more trustworthy.
- 3 Add Notes (Optional)**
Write a short note, for example the reason for the count or who is responsible.
- 4 Click 'Create'**
The system gives the stocktake its own reference number and marks it 'In Progress'.

Tip: Blind mode is the most reliable way to count, because staff record what they actually see instead of just confirming the expected figure.

Counting and Recording

Once a stocktake is open, your team counts the items and enters the quantity found for each one.

- 1 Enter the Counted Quantity**
For each product, record the amount you physically counted.
- 2 Review the Difference**
The system works out the variance automatically by comparing your counted quantity to the system quantity.
- 3 Add Item Notes (Optional)**
Explain anything unusual, such as damaged goods or items found in the wrong place.

Note: A positive difference means you have more than expected; a negative difference means stock is missing or unaccounted for.

Completing a Stocktake

- 1 Finish the Count**
Make sure every item has been counted before you close the stocktake.
- 2 Click 'Complete Stocktake'**
Use the green button on the stocktake card. Its status changes to 'Completed' and the completion date is saved.

Warning: Once a stocktake is completed it becomes a permanent record of that count, so double-check your figures before finishing.

24 Stock Transfers

Move stock between your branches and track each transfer from request to delivery.

What a Stock Transfer Does

A stock transfer lets you send products from one branch to another and follow the shipment every step of the way. Each transfer gets its own reference number and moves through clear stages so everyone knows where the stock is.

- Moves products from a source branch to a destination branch
- Tracks status: Pending, In Transit, Received, or Cancelled
- Lists every item and the quantity requested
- Keeps a numbered history of all transfers

Creating a Transfer

Open Stock Transfers from the sidebar. The stat cards at the top show your totals, plus how many transfers are pending, in transit, and received.

- 1 Click 'New Transfer'**
Use the button at the top right to open the transfer form.
- 2 Choose the From Branch**
Select the branch that the stock is leaving (the source). This field is required.
- 3 Choose the To Branch**
Select the branch that will receive the stock (the destination). This field is required.
- 4 Add Items and Quantities**
List each product to move and the quantity requested for it.
- 5 Add Notes (Optional)**
Include any instructions or context for the receiving branch.
- 6 Click 'Create'**
The transfer is saved with a reference number and starts with the status 'Pending'.

Tip: Pick the From and To branches carefully — the From branch is where stock leaves, and the To branch is where it arrives.

Tracking the Transfer

Every transfer moves through a series of stages, shown by a coloured status badge on its card:

- Pending — created and waiting to be shipped
- In Transit — on its way to the destination branch
- Received — arrived and confirmed at the destination
- Cancelled — the transfer was called off

Shipping and Receiving

You advance the transfer using the action buttons on each card as the stock physically moves.

- 1 Ship the Transfer**
When a transfer is Pending, click 'Ship' to mark it 'In Transit'. The system records the shipment date.
- 2 Receive the Transfer**
When stock arrives, click 'Receive' on the In Transit transfer to mark it 'Received'. The system records the date it was received.

Note: The Ship and Receive buttons only appear at the right stage, so you always move a transfer forward in the correct order.

25 Layaways

Reserve items with a deposit and collect installment payments until they're paid off.

Overview

A layaway lets a customer put items on hold with a deposit, then pay off the balance in installments before taking the goods home. Manage them from Layaways in the sidebar.

- Multi-item layaways with a live running total as you add products
- Optional due date, with an Overdue badge on the list once it passes
- Every payment is logged to a running ledger on the layaway
- Cancelling refunds whatever has been paid as store credit

Creating a Layaway

- 1 Start a new layaway**
Click 'New layaway' at the top of the page.
- 2 Select a customer**
Search and pick the customer the layaway is for. This field is required.
- 3 Add items**
Pick a product and quantity for each line. Click 'Add item' to add more rows. The total updates live as you add or remove lines.
- 4 Set a due date and notes**
Both are optional. The due date drives the Overdue badge once it passes.
- 5 Take an initial deposit (optional)**
Enter an amount under Initial deposit and choose a Deposit method: Cash, Mobile Money, Card, or Bank transfer. Leave it blank to start the layaway with nothing paid yet.

Tip: The line-item total is calculated live from each product's price as you build the layaway, so you can see the customer's total before saving.

Collecting Payments

Click any layaway in the list to open it.

- 1 Review the balance**
The detail view shows Remaining, Paid, and Total, plus the full items and payments ledger.
- 2 Take a payment**
Enter an Amount, or click 'Max' to fill in the full remaining balance. Choose a Payment method: Cash, Mobile Money, Card, Bank transfer, or Store credit. Click 'Take payment'.
- 3 Automatic completion**
Once the paid amount reaches the total, the layaway's status flips to Completed and shows 'Fully paid — converted to sale'.

Status and Cancelling

Warning: Cancelling a layaway refunds whatever has been paid as store credit. Cancelling requires manager-level permission.

Note: A layaway is Active, Completed, or Cancelled. An Active layaway past its due date shows a red Overdue badge in the list and on its detail view.

26 Gift Cards

Issue prepaid gift cards, track balances, and redeem them at checkout.

Overview

Gift Cards lets you issue prepaid cards, load or adjust their balance, and see every transaction on a card. Cards are redeemed later at the POS as a payment tender.

- Auto-generated or custom card codes
- Optional link to a customer and an optional expiry date
- Full transaction ledger: Issued, Redeemed, Adjusted
- Manual balance adjustments with a reason, plus Disable/Enable

Issuing a Card

- 1 Open the issue form**
Click 'Issue gift card' at the top of the page.
- 2 Set the value**
Enter the Initial value. This is required.
- 3 Code (optional)**
Leave the Code field blank to auto-generate one, or type a custom code yourself.
- 4 Customer, expiry, notes (optional)**
Link the card to a customer, set an expiry date, and add notes if useful.
- 5 Save**
Click 'Issue gift card' to create it. If the code you typed already exists, the form reports it.

Balance and Transaction History

Click any card in the list to open its detail view.

Note: The detail view shows Balance, Initial value, and Expiry side by side, plus a Transactions table with each entry's type (Issued, Redeemed, Adjusted), amount, balance after, and date.

Adjusting or Disabling a Card

- 1 Adjust the balance**
Enter a signed Amount (use a minus sign to subtract) and an optional Reason, then click 'Adjust'.
- 2 Disable or re-enable**
Click 'Disable' to stop a card from being used. The same button reads 'Enable' once the card is disabled, so you can turn it back on.

Warning: Adjusting a balance and disabling/enabling a card are manager-level actions.

Redeeming at the POS

Gift cards are not redeemed from this page, they're redeemed as a split-payment tender at checkout.

- 1 Open split payment**
In the POS terminal, switch the payment screen to split payment and choose the Gift Card tender.
- 2 Enter the code**
Type the card code, then click 'Check' to look up its current balance before applying it to the sale.
- 3 Apply it**
The card's balance covers part or all of the sale as one of the split-payment rows, alongside cash, card, or other tenders.

27 Discounts & Promotions

Set up time-bound discount rules that apply automatically at checkout.

Overview

The Promotions page defines discount rules that the POS applies automatically at the register, there's nothing for the cashier to type in at checkout.

- Percent-off or fixed-amount-off rules
- Scope a rule to all products, one category, or a single product
- Optional start and end dates, a rule outside its window is Scheduled or Expired automatically
- The POS shows a live 'Promo:' hint on the cart when a rule matches

Creating a Rule

- 1 Open the form**
Click 'New promotion' at the top of the page.
- 2 Name it**
Give the rule a Name.
- 3 Choose the type and value**
Pick 'Percent off' (capped at 100) or 'Fixed amount off', then enter the Value.
- 4 Choose the scope**
Select 'All products', a Category (type a name or pick an existing one), or a single Product via search.
- 5 Set a window (optional)**
Add Starts and Ends dates to schedule the rule, or leave them blank to run indefinitely.
- 6 Save**
Leave the Active checkbox on, or clear it to save the rule without turning it on yet, then submit.

Status and Editing

- 1 Edit a rule**
Click the pencil icon on a row to reopen the same form under 'Edit promotion'.
- 2 Deactivate a rule**
Click 'Deactivate' on an active rule to turn it off immediately.

Note: A rule's status is computed automatically from its window and Active flag: Active now, Scheduled, Expired, or Inactive.

28 Parked Carts

Hold an in-progress sale so it can be resumed later, without losing the cart.

Overview

Parking a cart suspends an in-progress sale at the POS terminal so the till is free for the next customer, useful when a customer steps away or a busy till is juggling several sales at once. Manage suspended carts from Parked Carts in the sidebar.

- Optional reason recorded when parking a cart
- Preview of the first items and running total on each parked cart
- Resuming reopens the POS terminal with the cart exactly as it was left

Parking a Cart

Parking happens from the POS terminal, not from this page.

- 1 In the POS terminal**
With items in the cart, click 'Park Cart'.
- 2 Add a reason (optional)**
A short reason can be recorded with the parked cart.
- 3 Confirm**
The cart clears from the register and appears on the Parked Carts page for anyone to pick up later.

Resuming or Discarding

- 1 Find the cart**
Browse the grid of parked carts. The stats bar shows Total Parked, Total Value, and Items across all of them.
- 2 Resume it**
Click 'Resume' on a card to reopen it in the POS terminal with its items and customer restored.
- 3 Discard it**
Click 'Discard' to permanently remove a cart that's no longer needed, then confirm the prompt.

Warning: Discarding is permanent, the confirmation reads: 'This parked cart will be permanently removed.'

29 Suppliers

Manage your supplier directory, record payments and returns, and see which products come from which supplier.

Overview

The Suppliers page (Inventory → Suppliers) is where you manage every vendor you buy stock from. It links to Purchase Orders and to each product's supplier assignment, so you always know where an item comes from and what you owe.

- Supplier directory with contact info, city/country, and a live count of the products each supplier provides
- Record supplier payments to settle outstanding balances from credit purchases
- Record goods returned to a supplier, with automatic stock adjustment when the return is linked to a product
- Print a full supplier statement: total purchased, total paid, total returned, and outstanding balance with a transaction ledger
- Inventory Report tab: stock value and cost value broken down per supplier, plus low-stock and out-of-stock counts
- Unsupplied-products tracking: see which inventory items aren't linked to any supplier

Adding and Managing Suppliers

- 1 Open Suppliers**
Go to Inventory → Suppliers in the sidebar (Purchasing & Suppliers section).
- 2 Click 'Add Supplier'**
Enter the supplier name (required), contact person, email, phone, address, city, country, and any notes.
- 3 Save**
The supplier appears in the directory and becomes selectable when creating purchase orders or assigning a product's supplier.
- 4 Edit or Delete**
Use the Edit and Delete buttons on any row. Editing and deleting require the relevant inventory permissions.

Tip: The 'Products' count on each supplier row shows how many inventory items are currently linked to them, so you can spot suppliers with no linked products at a glance.

Payments, Returns, and Statements

- 1 Record a Payment**
Click 'Pay' on a supplier row, enter the amount, choose a payment method (Cash, Mobile Money, Bank Transfer, or Card), and an optional reference and notes.
- 2 Record a Return**
Click 'Return', enter the item name, quantity, unit price, and a reason. This is recorded against the supplier's account.
- 3 Print a Statement**
Click 'Statement' to generate a printable ledger showing total purchased, paid, returned, and the current outstanding balance.

Note: Recording payments and returns requires inventory:create permission. Editing or deleting a supplier requires inventory:update or inventory:delete.

Inventory Report

Switch to the 'Inventory Report' tab to see stock value broken down by supplier.

- Grand totals: total suppliers, total products, total stock value, total cost value, low-stock and out-of-stock counts
- Expand any supplier to see its full product list with price, cost, stock level, and value
- An 'Unsupplied Products' panel lists inventory items not linked to any supplier
- Export the current report to CSV or print it directly from the page