Admin Panel

- Dashboard
- Parties
- Product Manager
- Sales
- Purchases
- Stock Transfer
- Stock Adjustment
- POS
- Expenses
- Cash & Bank
- Reports
- Subscription

Dashboard

Track Sales and Purchases with pending amounts. Filter the search by using options provided at top **Today, Yesterday, Last 7 Days, This Month, This Year.** Customize date filter search in dashboard.

image.png

Top Selling products can be viewed using pie chart. Sales and purchases amount graph will be tracked.

image.png

Sales and purchase history count shown as a widget.

image.png

Stock Alert products list widget and Top Customers list Widget shown.

Parties

Parties are users which either sales or purchase an item/product from your store/shop. You can create a party from **Parties** menu from sidebar. There are two types of parties in our app:

1. Customers
2. Suppliers

Customers

We sales items to customers. You can create customers from **Parties → Customers** page. Customers are common for each warehouses/store. But Opening balance, Credit period, Credit Limit are warehouse bases

image.png

Suppliers

We purchase items from suppliers in our app. You can create customers from **Parties → Suppliers** page. Suppliers are common for each warehouses/store. But Opening balance, Credit period, Credit Limit are warehouse bases.

image.png

The following fields are used when we create new party:

- Profile Image
- Name of party
- Email of party
- Opening Balance - it party have some pending amount then you can enter that amount.
- Opening Balance Type - it can be pay or receive. If you want to receive amount, then it will be received.
- Credit Period - time for which you want to give credit
- Credit Limit - amount for which you want to give credit

> Opening balance, Credit period, Credit Limit are warehouse bases. So, update it according to new warehouse/store.

Product Manager

You can create brands, categories and products from **Product Manager** menu. All these are common for every warehouses/stores. But for products opening stock, purchase price, sales price tax, custom fields, wholesale price are different for each warehouse/store.

> **Slug** are used in the query parameter. So, leave it same as auto generated until you don't know about it.

Brands

Brands are common for all warehouses/stores. You can create brands from **Product Manager → Brands** menu.

logo

Categories

Categories are also common for all warehouses/stores. You can create brands from **Product Manager → Categories** menu.

- If you want to create root category, then parent category will be empty.
- If you want to create a subcategory then select parent category from dropdown in which you want to assign that subcategory.

logo

Products

Products are also common for all warehouses/stores. You can create brands from **Product Manager → Products** menu. opening stock, purchase price, sales price tax, custom fields, wholesale price are different for each warehouse/store. These are fields which are used in creating products:

- **Barcode Symbology**
- **Item Code** - barcode id for creating product
- **Opening Stock** - If your store has some previous quantity than you can add it here
- **Quantity Alert** - After this quantity if your stock less then it will show out of stock.
- Besides these you can enter **name, slug, category, brand, purchase, sales, Mrp, custom fields.**

logo

Sales

When you want to add new sale. You can do it from **Sales → Sales** menu. You can filter sales by party, invoice number, dates. Also, you can get paid and unpaid sales status automatically when you add some payments to sales. Following action can be performed on sales:

- Get sales by **payment status** so that you can easily identify your business growth.
- Add **sales returns** when a party want to return some items
- Add payments to your sales invoice
- Download sales invoice

During **Sale** creation when you search for the product with **Name** or **Barcode** price variants will be displayed as shown below:

image.png

image.png

Sales Returns

When a sale return by party then you can add it from **Sales → Sales Returns** menu. After return you can add payment or credit notes. Sales returns status will be automatically generated after adding payments.

During **Sale Return** creation when you search for the product with **Name** or **Barcode** price variants will be displayed as shown below:

image.png

image.png

Payment In

You can add payment for a party from **Sales → Payment In** menu. When you add add payment it will automatically detected due invoices for selected party.

image.png

When you select the user, it will display all the user related pending invoices list as shown in below screenshot.

image.png

Purchases

Add new purchase from **Purchases → Purchases** menu. Filter puchases by party, dates, invoices number. Add payment from party for purchase and payment status will automatically calculated. Following action can be perfomed on sales :

- Get purchases by **payment status** so that you can easily identify your business growth.
- Add **purchase returns** when you want to return items to your supplier.
- Add payments to your purchase invoice
- Download purchases invoice

image.png

image.png

- Navigate to **Purchases → Create Purchase**.
- Start typing the **product name** or search with the **barcode**.
- Matching product(s) will appear in a dropdown list.
- When searching by **product name or barcode**, each item in the dropdown will display like in the above screenshot
- These entries represent **different price variants** of the same product name.
- This helps users identify which pricing combination they are selecting.
- ## When You Edit Sale Price or MRP:
    - After adding the product, click the **Edit icon** to update **Sale Price** or **MRP**.
    - If **either Sale Price or MRP is changed**, and no existing product with the new combination exists:

  A new **product variant** will be automatically created with:
    - Same **Product Name**
    - Same **Barcode, Category, Unit, Brand**
    - Updated **Sale Price and/or MRP**
    - Corresponding updated **Purchase Price**

Purchase Returns

When a sale return by party then you can add it from **Purchases → Purchase Returns** menu. After return you can add payment or credit notes. Sales returns status will be automatically generated after adding payments.

During **Purchase Returns** when you search for the product with **Name** or **Barcode** price variants will be displayed.

Select the appropriate product from list to continue:

image.png

Payment Out

You can add payment for a party from **Purchases → Payment Out** menu. When you add add payment it will automatically detected due invoices for selected party.

When you select the User, list of pending purchases will be displayed.

image.png

Stock Transfer

A **stock transfer** is the process of moving inventory items from one warehouse, store, or location to another within the same organization. It helps in balancing stock levels, fulfilling internal demands, and optimizing inventory distribution across multiple locations. Stock transfers ensure that the right quantity of products is available where needed, improving operational efficiency and preventing stockouts or overstocking.

During **Stock Transfer**, search for the product with **Name** or **Barcode**, products list will be displayed with different price variants. Select the appropriate product from list to continue:

image.png

image.png

Stock Transfer records can be tracked based on the payment status.

image.png

Stock Adjustment

You can add or reduce stock for your product from **Stock Adjustment** menu. After adding stock for product it will automatically perform following actions :

- Increase or decrease stock value
- Recalculate stock alert

Follow below steps to add new adjustment:

- **Product:** product for which you want to make adjustment
- **Quantity:** quantify by which you want to adjust stock
- **Adjustment Type:** add or reduce from stock

During **Stock Adjustment** when you search for the product with **Name** or **Barcode** price variants will be displayed.

Select the appropriate product from list to continue:

image.png

POS

You can make fast sales using POS page. It provide you more features to add fast sales for your walkin customers. Generate and print POS invoice in one click. In POS page you can add products in one click and generate invoices. You can search product by brand or category. Following steps is to make a POS sale :

- Select a customer
- Add at least one product
- Apply discount, tax, shipping etc.
- Collect payment
- Generate or print POS invoice

image.png

When you search by **name or barcode**:

- A **dropdown list** appears showing **matching products**.
- Each product is displayed **along with**:
  - **Sale Price**
  - **MRP** (Maximum Retail Price)

- These entries represent **price variations** of the **same product name**.
- Each is treated as a **distinct product variant** based on pricing. If the product is Same and changes MRP or Sale Price, then a new product will be created with **MRP** and **Sale Price** tag attachments. Screenshot attached below:

image.png

- Click on the desired variant (based on **Sale Price/MRP**).
- That specific variant will be **added to the cart**.
- This ensures billing reflects the correct pricing.
- If you scan or type a **barcode**, all matching price variants are listed.
- This is helpful when:
  - The same barcode is shared by products with different prices.
  - You want to confirm the **price before selection**.

Expenses

Add your business expenses from **Expenses → Expenses** page. You can create expenses category to organize your expenses. Filter your expenses by customer. So that you can find out which staff member making more expenses. For creating expense you have to create following steps :

1. First create expense category
2. Add expenses using expense category

image.png

Cash & Bank

It will show all payment information that from where payment comes. You can get all payments according to date filters. In cash & bank we calculate payments using following methods.

1. Cash - if payment mode is cash, then it will come under cash.
2. Bank - if payment mode is except cash, then it will come under bank section.

image.png

Reports

To get progress of store/shop, reports are very usefull. You can access reports sections using **Reports** menu. Following Reports are available:

- Payments
- Stock Alerts
- Sales Summary
- Stock Summary
- Rate List
- Products Sales Summary
- Users Reports
- Expense Reports
- Profit & Loss

Payments

You can get all payments reports here according to user or dates. Can **Print** reports or export to **Pdf** and **Excel** formats.

image.png

Stock Alert

You can get which product is out of stock from here. you can filter product from which stock alert exceed. Can **Print** reports or export to **Pdf** and **Excel** formats.

image.png

Sales Summary

A sales summary provides a concise overview of total sales performance over a specific period based on the Staff Member. Can **Print** reports or export to **Pdf** and **Excel** formats.

image.png

Stock Summary

A stock summary gives a quick overview of current inventory levels, including quantities and values of available items. Can **Print** reports or export to **Pdf** and **Excel** formats.

image.png

Rate List

A rate list displays the prices of products or services offered by a business. Can **Print** reports or export to **Pdf** and **Excel** formats.

image.png

Product Sales Summary

A product sales summary shows the total sales performance of individual products over a specific period. Can **Print** reports or export to **Pdf** and **Excel** formats.

image.png

Users

You can get users full reports from here so that it you can easily identify their contribution in your store. Following reports are available under this section:

- Purchase, sales, purchase return, sales returns
- Due Amount, Paid Amount
- Order Payments

Can **Print** reports or export to **Pdf** and **Excel** formats.

image.png

Expense Reports

An expense report summarizes and tracks business-related expenditures over a specific period. Can **Print** reports or export to **Pdf** and **Excel** formats.

image.png

Profit & Loss

A profit and loss report summarizes a business's revenues, costs, and expenses to show net profit or loss over a specific period. Can **Print** reports or export to **Pdf** and **Excel** formats.

image.png

Subscription

A **subscription** is a recurring agreement where a customer pays at regular intervals (e.g., monthly or yearly) to access a product or service.

image.png

We can select any new plan by select change plan button. Previous transactions and offline requests can be viewed.