



WAVEPOS



DOCUMENTATION

User Guide

As v3 comes with new theme, let me explain the main sections of the home screen. We are adding image of the dashboard and on right with overlay to name the main sections of the page. These sections are same for each page. Only the main content area will be different for pages and will be displaying the view files from your theme folder.

The screenshot shows the 'Stock Manager Advance' dashboard. On the left is a dark sidebar menu with options: Dashboard, Products, Sales, Quotations, Purchases, Transfers, People, Notifications, Settings, and Reports. The top bar is black with the title 'Stock Manager Advance' and user info 'Welcome owner'. The main content area has a light grey background and contains: a green notification box 'You are successfully logged in.', a blue notification box with a system update message, a 'Happy New Year' message, a 'Quick Links' section with buttons for Products, Sales, Quotations, Purchases, Transfers, Customers, Suppliers, Notifications, Users, and Settings, and a 'Latest Five' section with a table of sales data.

#	Date	Reference No	Customer	Total	Payment Status	Paid
1	05/11/2014 00:00	SL/2014/11/0001	Customer Company Name	1237.00	partial	1523.46
2	24/09/2014 00:00	SL-001	Test Customer	500.00	paid	550.00

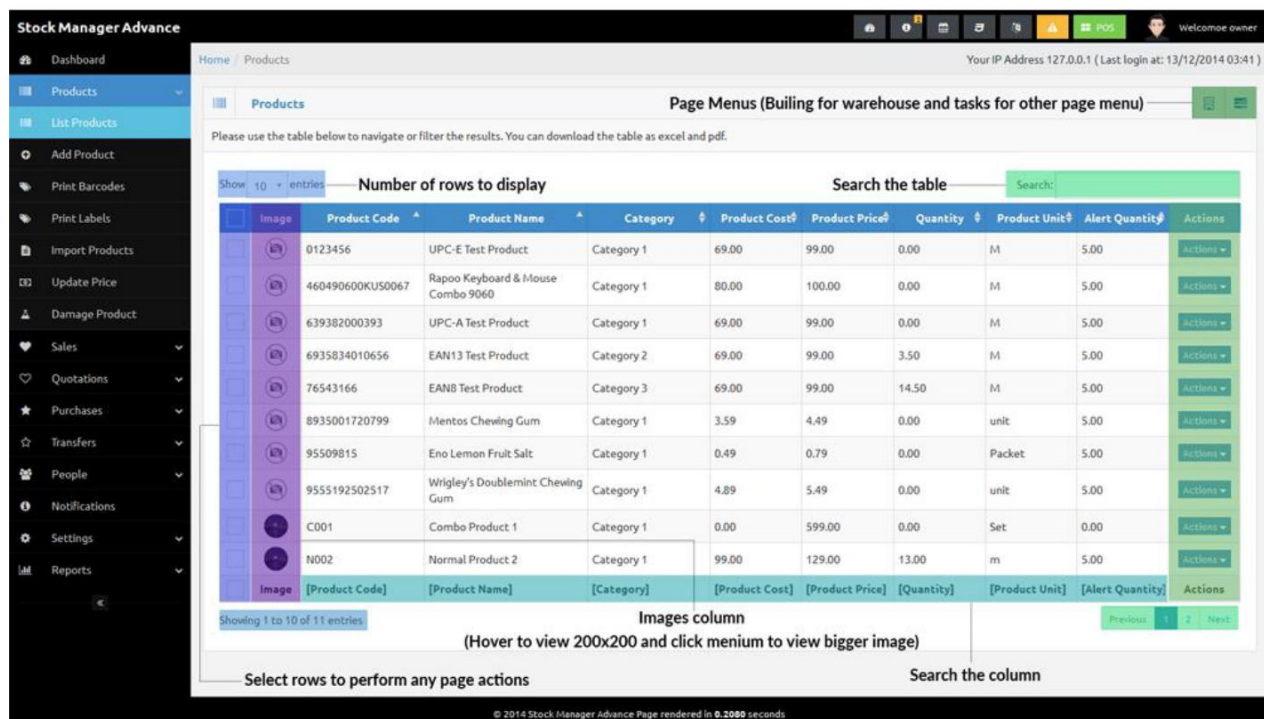
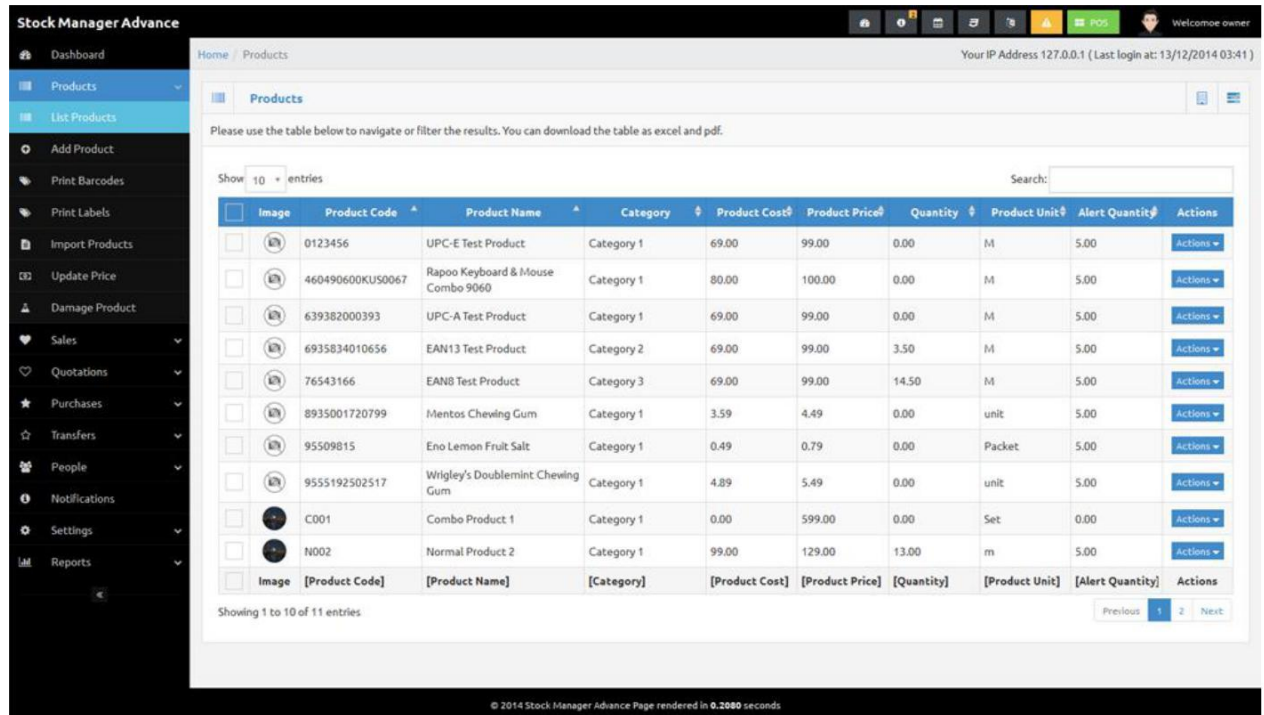
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This image is an annotated version of the dashboard screenshot. It features a green top bar labeled 'Top Bar (Header)'. The notification area is highlighted in yellow and labeled 'Notifications Area (Lower Header)'. The main content area, including the quick links and the sales table, is highlighted in cyan and labeled 'Main Contents (View Files)'. The sidebar menu is highlighted in blue and labeled 'Main Menus (Left Sidebar)'. The footer is black and labeled 'Footer'. The same sales table data is present as in the previous image.

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New listing pages comes with new page menu position, select row column and Image column (where applicable). We have added the listing page and overlay page to explain the new sections. You can see the new menu position in top left of main content area. Building icon is to list the warehouse and the tasks icon for other page menus, will work with select row.



In v3, main menus (left side) has been updated to track the active page and breadcrumb has been added on top of the main content area.

Users

Users are the staff members (your employees). You can add any number of users and assign them group (manager groups and permissions in settings), biller and warehouse.

Owner and Admin user groups are with fixed permissions and any other user group added by you, can have custom permissions.

Please check the edit user page for some user related permission such as view/edit rights and discounts.

If you don't assign any biller and/or warehouse, the user will be able to add sales for all of them as admins.

The users added in customer/supplier modules will be saved in this table too but you need to edit/manage them from their modules.

Timeout feature has been enabled. The user will be timed out after 3 unsuccessful login attempts for 10 minutes. You can disable this in `app/config/ion_auth.php` by changing the `$config['track_login_attempts'] = TRUE;` to `$config['track_login_attempts'] = FALSE;` or you can increase the attempts from 3 to any number you like.

Billers

Billers are the selling companies (you or your companies/organizations), you can sell/quote/invoice your customers with any biller, means you can have multiple companies/organizations and can assign any of these to your staff so that all of their sale will be under assigned billing company.

Only users with owner group rights can add billers. Logo, Company, Name (Contact Person), Email, Phone, Address and City input fields are required.

This module is simple to use and manage the biller. The interface is quite easy to understand. The logos can be uploaded by visiting the change logo under settings and once uploaded you need to edit the biller to set the new logo.

Customers

Customers are the clients of your companies/organizations. They purchase the items that you/your companies/organizations sell. This module has been updated and now you can add customer groups in settings i.e, Normal Customer, Regular Customer, Resellers, Distributors etc and assign percentage decrement/increment to the price depending on their group.

Company, Name (Contact Person), Email, Phone, Address and City input fields are required. You can add extra information about the customer as there are 6 custom fields and the select box in front of each custom field is to display this information on invoices/quotations.

If the customer is not company, you can skip the company file with dash symbol (-) so that system will consider it as person.

The inputs for customer in other modules are no more select/drop down but ajax calls, you can type in search field to get the suggestions and select any suggestion available in database for customers. You can add customer by clicking the Add Customer menu under People from any page. The interface is quite easy to understand.

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

Price Groups: The price group can be assigned to customer and then all the sales will use that price group for the customer. This feature will help you set the different prices for customers.

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

Suppliers

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

Company, Name (Contact Person), Email, Phone, Address and City input fields are required. You can add extra information about the customer as there are 6 custom fields and the select box in front of each custom field is to display this information on purchases.

If the supplier is not company, you can skip the company file with dash symbol (-) so that system will consider it as person.

The inputs for supplier in other modules (purchases and products) are no more select/drop down but ajax calls, you can type in search field to get the suggestions and select any suggestion available in database for supplier. You can add supplier by clicking the Add Supplier menu under People from any page. The interface is almost same as billers and customers, easy to use.

Products

Products are the items that you sell to your customer. This module has been updated and has many new options/features. There are new menus for each product on List Products page. The icon menus have been replaced with the dropdown menus.

1. **Product Details:**
A new page has been added to display the products details.
2. **Duplicate Product:**
To duplicate the product, all the field on add product will be updated with selected product details. You will need to change the code and name.
3. **Edit Product:**
To edit product details.
4. **Set Rack:**
To set/change product rack (only available if warehouse selected).
5. **View Image:**
View the main product images, this is already shown in the image column.
6. **Print Barcode/Label:**
To print the product barcodes/label, this will bring you to the print barcode/label page with the item.
7. **Delete Product:**
To delete the product.

There are 4 types to choose for the product,

1. **Standard:** These are the standard product like phone, ram, speakers etc.
2. **Combo:** These are products that consist of more than 1 product in your stock like computer with Casing, RAM and Speakers as combo items.
3. **Digital:** These are the digital products that can be downloaded only like software, movies, pdf tutorials etc.
4. **Service:** This are service as checking/repairing fee for the computer.

Now you can assign the barcode symbology, product tax, tax method and supplier (up to 5 with their price) to each product. You can select the main product images and multiple product gallery images. You even can add the current stock for each warehouse.

The product details will be displayed on view product page and the product details for invoice will be displayed on the invoice under these items.

Product variants:

You can add any number product variants/attributes and these will be tracked automatically on purchase/sale. There print barcode/label page for each product will show the new barcode image if there are variants available for the product. This will help you to manage the products well specially for those who need to track the products attribute i.e, sizes and color etc.

Variants are single level and if your product has nested variants, then you can add the as Red Size 5, Yellow size 6 etc. You need to add these only once for each product.

Print Barcodes and Labels:

This page has been added so that you can select any products to print barcode/label as desired. You can choose any page styles and print with any desktop printer.

Quantity Adjustments:

This feature will help you to manage the damage and other issues with your stock.

Stock Counts:

The stock count is the physical verification of the quantities and condition of items held in an inventory or warehouse. Stock count may be performed as an intensive annual end of year procedure or may be done continuously by means of a cycle count. An annual end of year stock count is typically done for use in a company's financial statements.

Once count has been completed, you can add adjustment to update your current stock.

Product Units:

You can add product measuring units in system settings and then select the base unit while adding/editing the products. This feature will help you to manage the quantity well, while purchasing and selling in different units.

For example, you purchase coke as a box of 12 bottles and you sell them as bottle. You can add base unit of box/bottle and then add other with conversion. Add the products and select new base unit. You even can select the default purchase and sale units on add/edit product page.

Import product and update price with csv file:

The instructions are available on the pages.

The option to add (product and variants) quantity to the warehouse is available on add product page but we recommend you to not use this. Instead you can add all products and their variants with 0 quantity then add purchase to update the stock for (products and their variants) to the warehouse.

Sales

Sales (Invoices) to manage the sales and payments received. Add sale will automatically decrease the product quantity from the selected warehouse. If your product has variants that will be synchronized too. List sales page have these drop down menus in the actions column for each sale.

- 1. Sale Details:**

To view the sale details.

2. **View Payments:**
To view the payments for the sale.
3. **Add Payment:**
To record the payment for the sale. If you have enabled the paypal and skrill button in settings, the payment will automatically have recorded upon successful payment by customer.
4. **Add Delivery:**
To add the delivery of the sale items.
5. **Edit Sale:**
To edit the sale.
6. **Download as PDF:**
To download the sale as pdf.
7. **Email Sale:**
To email the sale to the customer.
8. **Return Sale:**
To record return sale.
9. **Delete Sale:**
To delete the sale.

Add Sale page has been redesigned too and like add purchase. There is only single input field to add the products to order list. You can type the product name or code to get the suggestion and the select the suggestion or just scan the barcode with your barcode scanner to add product to the order list. If there is only 1 suggestion for your typed characters, then it will automatically have added to the order list. If you have scanned the barcode with option, the order item option will automatically set to the scanned barcode option.

Add product to order list and the totals will be automatically stick top and bottom once the order list reached the number that you have in settings for Product counts to fix for barcode input.

Payment terms are the number of days before this sale marked as due. This value should be an integer 14 for 14 days' payment term and 30 for 1 month etc.

There are 2 sale status

1. **Pending:** The sale is added but the items has not been handed-over/delivered to the customer.
2. **Completed:** The sale us added and the products has been sent/handed-over/proceed for delivery.

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

1. **Pending:** The payment has not yet received.
2. **Due:** The payment term had been reached but the payment has not yet received.
3. **Partial:** Customer has made the partial payment and there is balance that still need

to pay by customer.

4. **Paid:** The payment for the sale has been completely paid.

There are 2 icon links at the end of add product to order list input.

1. Plus icon: To add the product to the order list manually, this won't be added to the database but only to the sale.
2. Card icon: To add the gift card to database and sell by adding to the order list.

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

If any of the product in order list is red that means the product or selected variant is out of stock or warehouse quantity is lesser then ordered quantity (you can change the product variant or reduce the quantity). If over-selling is disabled, it will produce error on submit.

Why sale price is higher than the price on list product page?

Please check the customer groups for that customer. The customer groups allow you to set the percentage (%) addition/deduction to the product price for that group of customers.

Quotations

Quotations modules is almost same as in v2.3. The only change is add quotation page redesign that is similar to the add sale page with the following status

1. **Pending:** The quotation has been generated but not yet sent to customer.
2. **Sent:** The quotation had been generated and sent to the customer. Emailing the quotation will automatically change the status to **sent**.
3. **Completed:** The sale had been generated for this quotation. Add invoice link on the quotation menu will automatically change the status to complete once the sale generated.

Purchases

Purchases (Inventories) to update the stock of your products. Adding purchase will automatically increase the product quantity in the selected warehouse. List purchases page have these drop down menus in the actions column.

1. **Purchase Details:**
To view the details of the purchase.
2. **View Payments:**
To view the payments made to the purchase.

3. **Add Payment:**
To add new payment record for the purchase.
4. **Edit Purchase:**
To edit the purchase.
5. **Download as PDF:**
To download the purchase as pdf.
6. **Email Purchase:**
To email this to supplier.
7. **Delete Purchase:**
To delete the purchase.

Add Purchase page has been redesigned. There is only single input field to add the products to order list. You can type the product name or code to get the suggestion and then select the suggestion or just scan the barcode with your barcode scanner to add product to the order list. If there is only 1 suggestion for your typed characters, then it will automatically have added to the order list.

Add product to order list and the totals will be automatically stick top and bottom once the order list reached the number that you have in settings for Product counts to fix for barcode input.

Please select more options to add the order tax, discount and shipping. You even can add purchase by csv files by visiting the Add Purchase by CSV in main menus under Purchases.

You even can add standard product to your database by clicking the + icon at the end of add product to order list input.

Transfers

If you have multiple warehouses/stores, you might need to transfer/move item from one to another. This module will help to manage these tasks. You can add transfer to record the transfer details.

There are 3 transfer status

1. **Pending:** The transfer is added but the products are not yet sent so no inventory action will be performed.
2. **Sent:** The transfer is added and products has been sent but not yet reached the destination so the items have been checked from the sending warehouse but not yet add/updated to the destination warehouse.
3. **Completed:** The transfer is added and products has been sent by from warehouse and received in to warehouse so the item will be subtracted from sending rehouse and added/updated in the destination warehouse.

Settings

Please setup cron job as mention on the page. The cron job can be run from the local installation by the settings page but send the email depends on your local setup.

Please add your default currency and save your settings first. You need to set default currency and accounting method before using this system.

The default currency is very important to set before any sale as this this would destroy the costing if you set if after sales.

Let me explain the system settings page. In main content area, there are Skill and Paypal settings links in the end of the box heading System Settings (page menu).

1. Site Configuration

- o **Site Name:** Input for the site name (whatever you want to call this system).
- o **Language:** Option to select system default language.
- o **Default Currency:** Option to select system default currency (THIS SHOULD BE SAVED BEFORE ADDING ANY DATA).
- o **Accounting Method:** There are 3 methods available
 - **FIFO (First In First Out):** FIFO inventory costing method will not work with over selling.
 - **LIFO (Last In First Out):** LIFO inventory costing method will not work with over selling too.
 - **AVCO (Average Cost Method):** AVCO is the only method that you can use with over selling enabled.
- o **Default Email:** Input for system default email, all email will be sent from this email address.
- o **Default Customer Group:** Option to select default customer group (useful for adding customer).
- o **Default Price Group:** Option to select default price group (useful for adding customer).
- o **Maintenance Mode:** Option to enable or disable offline mode.
- o **Theme:** Option to select theme.
- o **RTL Support:** Option to enable right to left languages.
- o **Login Captcha:** Option to enable login captcha.
- o **Number of days to disable editing:** You can set the number of days to disable the edit sales
- o **Rows per page:** Option to show the no of record in table on each listing page.
- o **Date Format:** Option to select date format.
- o **Timezone:** Option to choose your timezone. This is AC input just type your continent/city and choose it from suggestion.
- o **Calendar:** Option to choose calendar privacy, Shared or Private.

- o **Default Warehouse:** Option to select the default warehouse, this will be auto selected for owner on add sale/purchase/quotation/transfer page.
- o **Default Biller:** Option to select the default biller, this will be auto selected on add sale/quotation page.
- o

2. Products

- o **Product Tax:** Option to enable/disable product level tax.
- o **Racks:** Option to enable/disable product rack feature.
- o **Product Variants:** Option to enable/disable product variants (attributes) feature.
- o **Product Expiry:** Option to enable/disable product expiry date feature.
- o **Remove expired products from stock:** Should system automatically remove the expired products from stock with cron job?
- o **Image Size:** Option to set image sizes that can be uploaded
- o **Thumbnail Size:** Option to set thumbnail size (50-80).
- o **Watermark:** Option to enable/disable watermark on product images, water mark text will be your site name.
- o **Display warehouse products:** Should system display products with o quantity in warehouse?
- o **Barcode separator:** Please select any option for separating the products code with variant id (useful for auto select the variant on sale with barcodes).
- o **Barcode Renderer:** Render barcode as images or as svg.
- o **Update cost with purchase:** Should system update product cost with new cost while adding purchase.

3. Sales

- o **Over Selling:** Option to enable over selling, this option only can work with AVCO accounting method, enabling this will automatically change the account method to AVCO (if it was FIFO or LIFO).
- o **Reference Format:** Option to select the reference format. o
- Order Tax:** Option to enable/disable order level tax.
- o **Product Level Discount:** Option to enable/disable product level discount.
- o **Product Serial:** Option to enable product serial input on sale.
- o **Auto Detect Barcode:** Option to enable/disable auto detection for barcode.
- o **Product count to fix barcode input:** No of the row on add sale/quotation/purchase/transfer page to fix the product input and totals to top and bottom.
- o **Cart Item Addition Method:** Option to select the method to add items to order list, you must select Add New Item to Cart if your products have variants.
- o **Default Order Page Focus:** After adding the product to order list, should the focus set on the add item input or the quantity input fir newly added product?
- o **Invoice View:** You can switch the invoice layout to Standard, Tax Invoice or

Indian GST.

4. Prefix

- o **Sales Reference Prefix:** Option to set sale reference prefix.
- o **Return Reference Prefix:** Option to set return sale reference prefix.
- o **Payment Reference Prefix:** Option to set sales payment reference prefix.
- o **Purchase Payment Reference Prefix:** Option to set purchase payment reference prefix.
- o **Delivery Reference Prefix:** Option to set delivery reference prefix.
- o **Quotation Reference Prefix:** Option to quotation sale reference prefix. o
- Purchase Reference Prefix:** Option to set purchase reference prefix.
- o **Return Purchase Reference Prefix:** Option to set return purchase reference prefix.
- o **Transfer Reference Prefix:** Option to set transfer reference prefix.
- o **Expense Reference Prefix:** Option to set expense reference prefix.
- o **Quantity Adjustment Reference Prefix:** Option to set quantity adjustment reference prefix.

5. Money and Number Format

- o **Decimals:** Option to set number of decimals for amounts.
- o **Quantity Decimals:** Option to set number of decimals for quantity.
- o **South Asian Countries Currency Format:** If you are from India, Nepal or Pakistan etc?
- o **Decimals Separator:** Option to set decimals separator.
- o **Thousand Separator:** Option to set the thousands separator.
- o **Display Currency Symbol:** If you want to display currency symbol before amounts
- o **Currency Symbol:** Set your currency symbol as \$ or `<i class="fa fa-dollar">`

6. Email

- o **Email Protocol:** Option to select email sending protocol.
 - **PHP Mail Function:** Send email using default php mail function.
 - **Send Mail:** Send email using sendmail and the default mailpath is `/usr/sbin/sendmail`
 - **SMTP:** Requires extra information and the default time out is 5 seconds.
 - **SMTP Host:** SMTP Server Address
 - **SMTP User:** SMTP Username
 - **SMTP Password:** SMTP Password
 - **SMTP Port:** SMTP Port

7. Award Points

- o **Customer Award Points:** Each X spent is equal to X award points
- o **Staff Award Points:** Each X in sales is equal to X award points

You can manage currencies, categories, sub-categories, taxes, warehouses, customer groups, email templates, user groups and permissions. In the admin area all the prices are in default currency and this multiple currency feature is just for front end that will be added later.

Reports

The following reports are available

1. **Overview Chart:** Main reports page with links to all other reports and the overview chart.
2. **Warehouse Stock Chart:** Warehouse stock report, you can choose the warehouse in page menus.
3. **Best Sellers:** Overview of bestselling products.
4. **Product Quantity Alerts:** The list of products that are reached the alert quantity and need to be purchased.
5. **Register Report:** All record of register/counters for POS module.
6. **Product Quantity Alerts:** The items that have reached the low stock (alert quantity).
7. **Product Expiry Alerts:** The list of products that are about to expire in less than 90 days.
8. **Product Reports:** For customized product report, you can click the icon at page menu for customize the report.
9. **Adjustment Report:** Quantity adjustments report can be customized as others.
10. **Categories Report:** Overview of the categories' sales.
11. **Brands Report:** Overview of the brands' sales.
12. **Daily Sales:** Calendar with daily sales.
13. **Monthly Sales:** Calendar with monthly sales.
14. **Sales Report:** For customized sales report, you can click the icon at the page menu for customize the report.
15. **Payment Report:** For payment report, you can click the icon at the page menu for customize the report.
16. **Profit and/or Loss:** Profit and/or Loss report for the selected time frame (date range).
17. **Daily Purchases:** Calendar with daily purchases.
18. **Monthly Purchases:** Calendar with monthly purchases.
19. **Purchase Report:** For customized purchase report, you can click the icon at the page menu for customize the report.
20. **Expenses Report:** Expense list and can be customized as other reports.
21. **Customer Report:** For customer report, you can click the icon at the page menu for customize the report.
22. **Supplier Report:** For supplier report, you can click the icon at the page menu for

- customize the report.
23. **Staff Report:** For staff report, you can click the icon at the page menu for customize the report.