DRUK POS

User Manual
For
User: Admin

Technical Documentation

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An Overview on Druk POS

Druk POS (Point of Sale) is a web application that allows the retailers and wholesalers alike to record inventory, track suppliers and customers, sell products and services, and generate reports.

Druk POS software comes in two versions;

1. Cloud-based Retail System and,
2. Cloud-based Wholesale System.

Geared towards efficiency and convenience, the cloud-based systems are fast and reliable, with your business data securely backed up online.

As long as you are connected with the internet, you can access your shop data from anywhere, any time through this tool providing you the flexibility of managing your business from any location in the world.

Why Choose Druk POS?

- Easy to understand features and navigation bars

- Simple inventory management

- User friendly sales transaction window

- Track sales based on transactions and cashiers

- Effective measures to boost cashier accountability

- Generate daily or date range based reports

- Automatic discounts with predefined promotion offers

- Set up and brand the POS as your own with your own logo and information.

- Prompt technical support whenever required.

- Have easy and complete access to your data

- Local tech team: Proactive response towards fixing bugs and malfunctions

Getting Started

The main operation of Druk POS is carried out through two user roles:
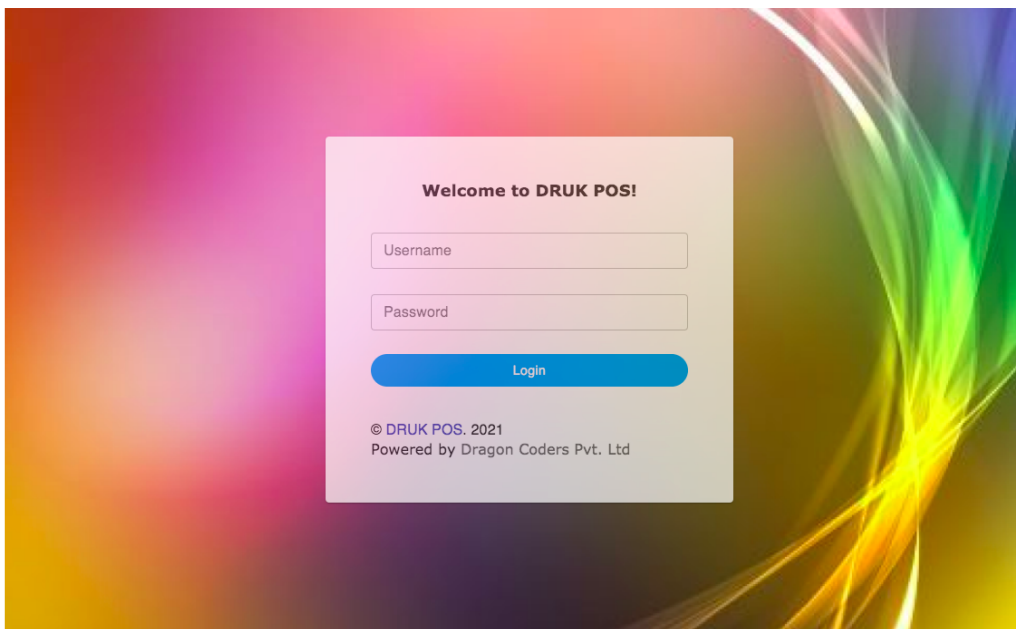
    1. Admin

    2. Cashier.

This User Manual will guide you through the Admin dashboard, its features and functionalities.

The majority of the tasks are executed by the Admin starting from adding products to the inventory, user management, creating promotions to report generation.

USER GUIDE

1.Launching Druk POS

Open a browser and type in the Druk POS URL for your business provided to you by the company, Dragon Coders. Feed in the credentials and login as Admin:
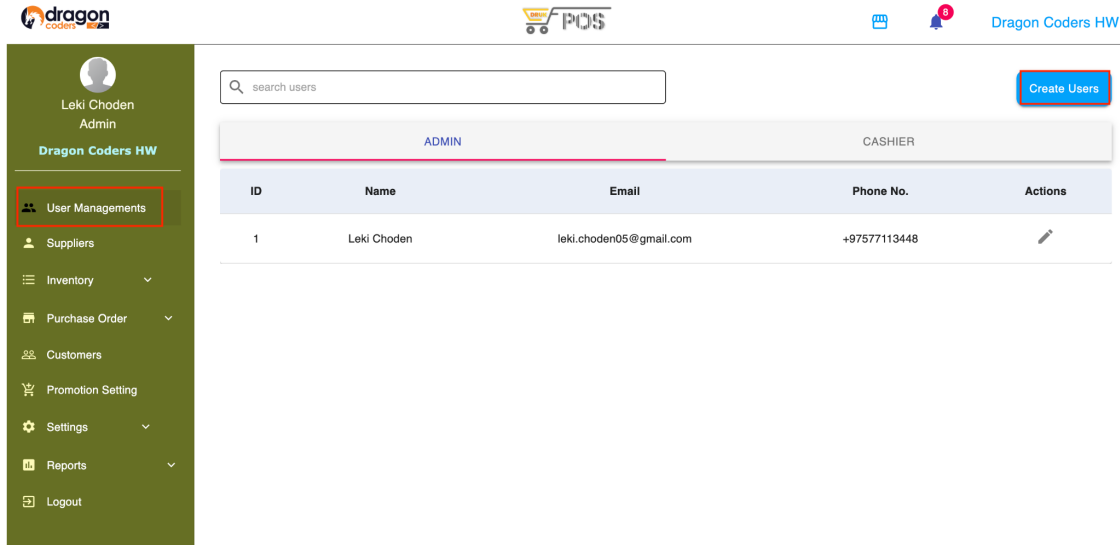

Picture 1.0

2. User Management

The Admin can create users and edit user information. To create a user:

 a. Click on the User Managements on the main navigation bar

 b. Click on "Create Users" button

Picture 1.1

 c. Fill out the details

 d. Assign roles
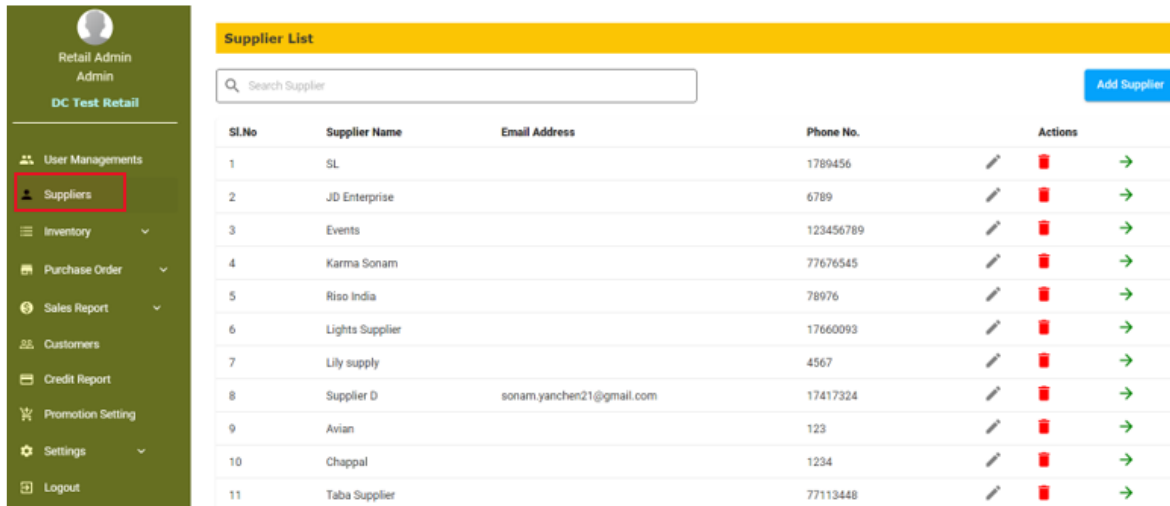
Picture 1.2

e. Give a password (the password can be changed later on by the user after logging in)

f. Click on the "Create User" button.

3. Suppliers

The Admin can create and maintain a database of the regular Suppliers. To add a new Supplier:

Picture 1.3

1. Click on the "Supplier" on the nav bar
2. Click on "Add Supplier" button
3. Give supplier information in the fields
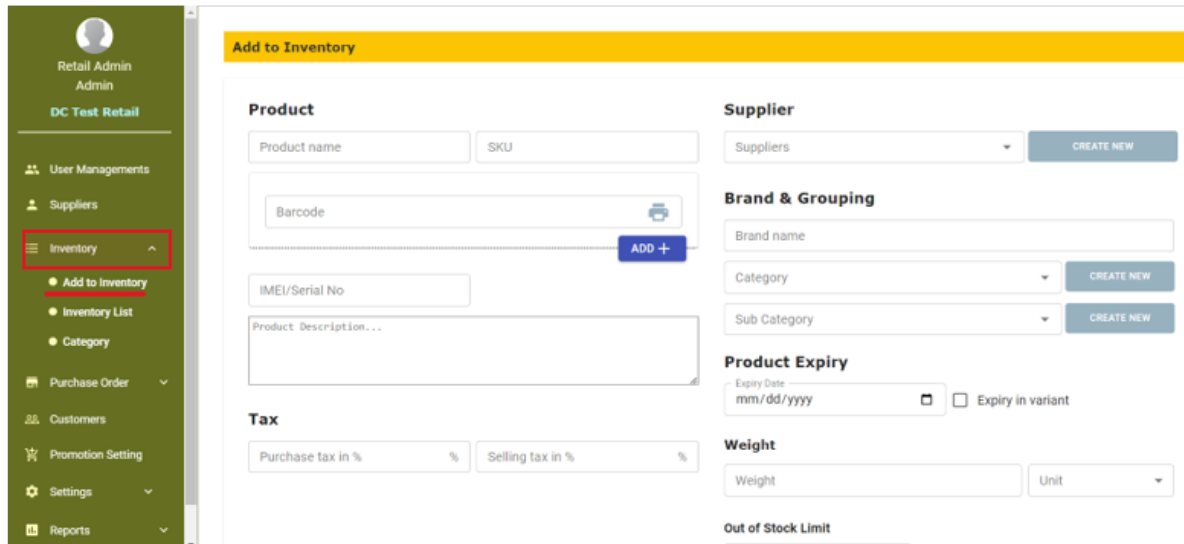4. Click on "SAVE" button

    A new supplier is added to the supplier list.

4. Building up Inventory

Building up inventory is an important step towards preparing your virtual business unit. Enter details of all the items your business deals in.

This is a one time exercise only.

1. Click on "Inventory" on the main nav bar (See picture 1.1)

Picture 1.4

2. Click on "Add to Inventory" to add products to the inventory list

Enter Product Details as follows:

1. Product name: enter the name of the product

2. SKU (Stock Keeping Unit), (Optional feature - required only if you want to develop your POS software into an e-Commerce Platform in the future)

3. Barcode: Use a scanner to scan the barcode shown on the product. If no barcode is available on the product, then click on the printer icon provided, to generate and assign a unique barcode of your own to the product.

4. Description: enter description of the product for anyone's understanding.

5. Tax (if applicable)
   - Enter Purchase Tax %
   - Enter Selling Tax %

6. Supplier: If the suppliers are already created before, clicking on the down arrow will show all the list of the suppliers, from which you can select one.

   To create a new Supplier:

   a. Click on the "CREATE NEW" button,

   b. Enter supplier details,

   c. Click on the "Add" button,

7. Brand and Grouping:

   I. Brand Name: enter the brand name of the product.

   II. Category: if the category is already created, the Admin can select from the dropdown list.

      To create a new category:

      A. Click on the "CREATE NEW'' button,

      B. Enter category details,

      C. Click on the "Add" button.

   III. Sub-category: if the sub-category is already created, the admin can select from the dropdown list.

      To create a new sub-category:
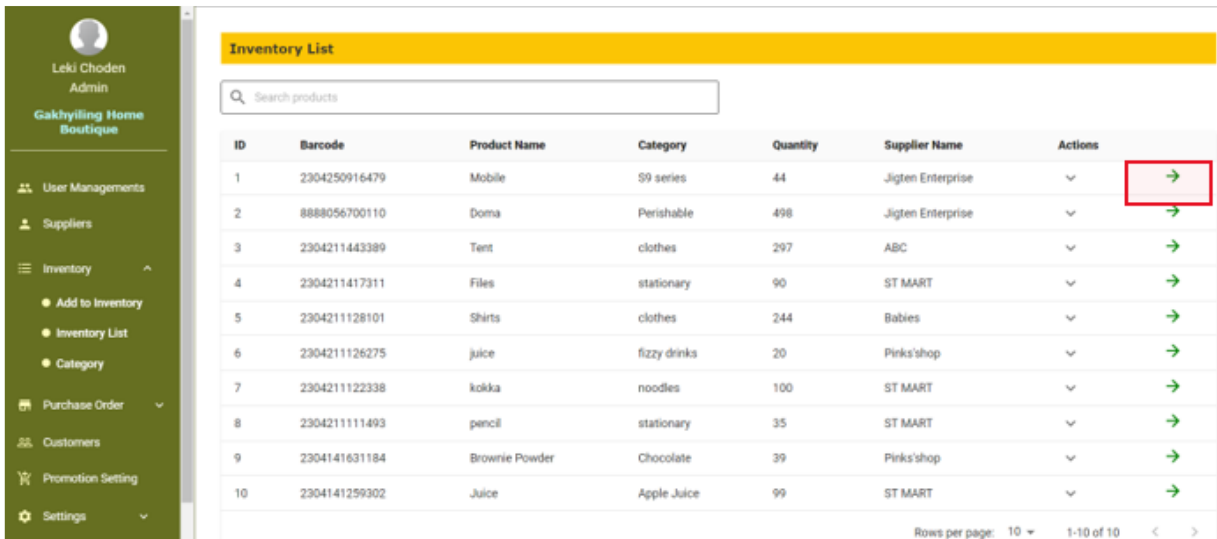
      A. Click on the "CREATE NEW'' button,

      B. Enter details,

      C. Click on the "Add" button.

8. Product Expiry :

   I. Expiry date (optional): Enter the expiry date of the product either manually or from the calendar provided.

   II. Clicking the checkbox for "Expiry in variant" will enable the expiry related notifications in respective product variants.

9. Weight: enter the weight and unit of the product.

10. Out of Stock Limit (optional): provide a stock limit number so that the system can throw you an out-of-stock notice when the stock reaches that limit defined. If the product has multiple variations, you can set your desired stock number limit for out-of-stock notifications on the variant level.

11. Variants: this feature is available to record products that have different variants such as multiple sizes, colors, materials, etc to the same product.

12. Click on the "Save" button to add the product to the inventory list.

13. Users can archive inventory and unarchive inventory. (cashiers will not   be able to sell archived inventory)

4.1 Print Barcode from the Inventory List

To print barcodes from the inventory list, expand the Inventory menu. Click on the inventory list then:
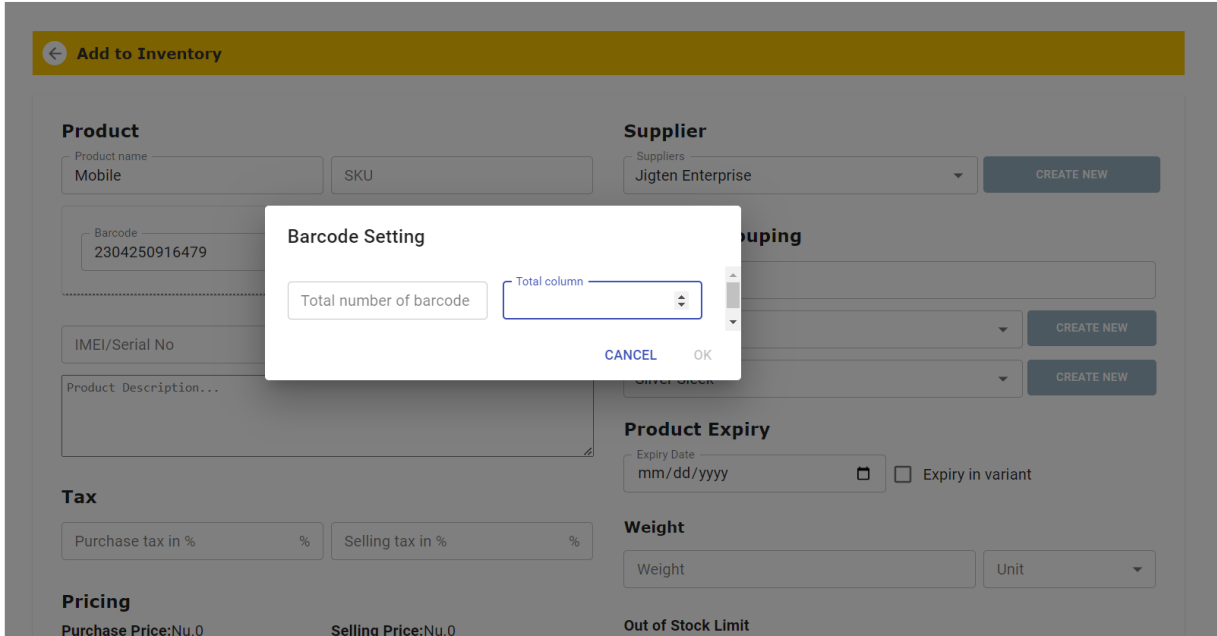
1. Click on the 'right arrow' on the inventory that you want to print barcode.(refer *picture 1.2*)
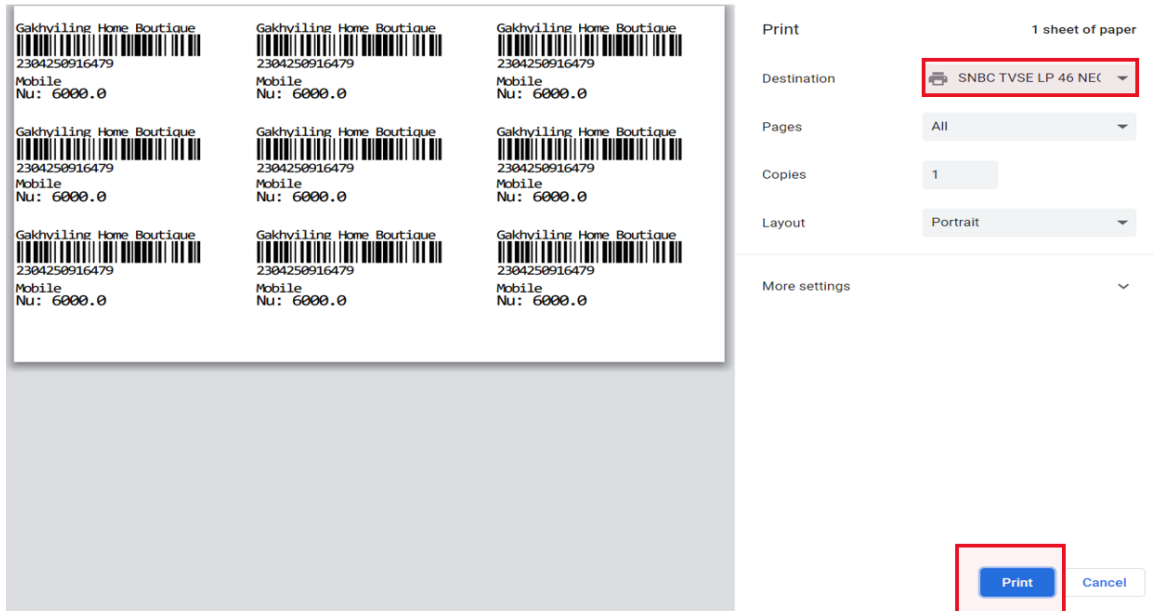

Picture 1.5

2. Under the barcode, click on the printer icon and open "Barcode Setting" (refer *Picture 1.3*)

Picture 1.6

3. Enter the desired number of barcodes and the total no. of columns.

4. Click ok.`

5. Preview the number of barcodes you can print. Select the type of printer you want to use and then specify the number of copies you would like. (refer *Picture 1.6*).

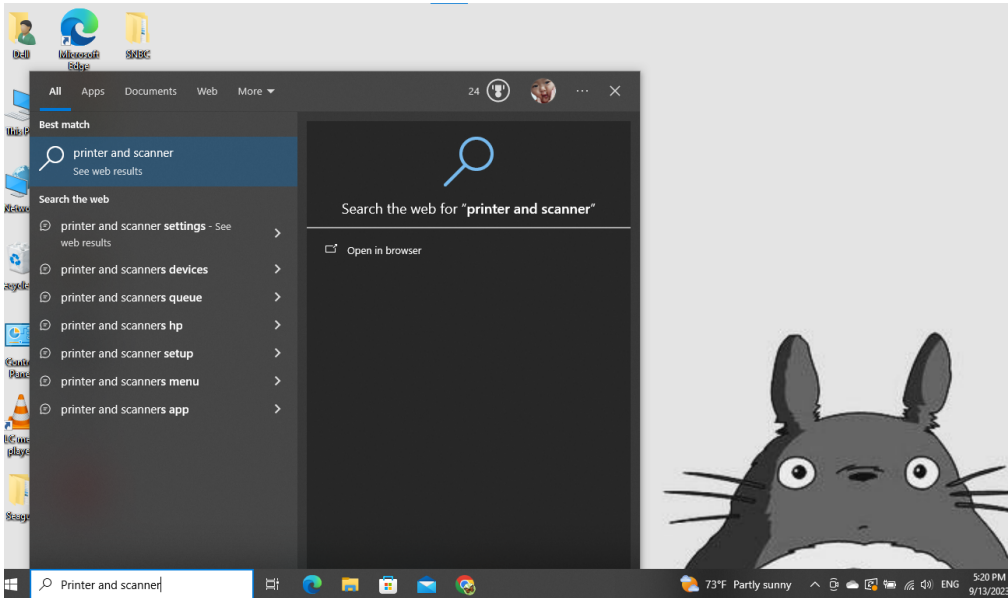6. Click on the 'Print' button (refer *Picture 1.6*)

Picture 1.7

Setting of Barcode Printer

How to set your barcode printer,

1. Begin by installing the printer driver for your barcode printer.
2. Once the printer driver installation is complete, navigate to your desktop search and look for "Printer and Scanner" (see the screenshot below for reference).

3. Select the installed printer driver from the list.

4. Click on "Manage" to access printer settings.

5. Choose "Printer Preferences" from the menu.
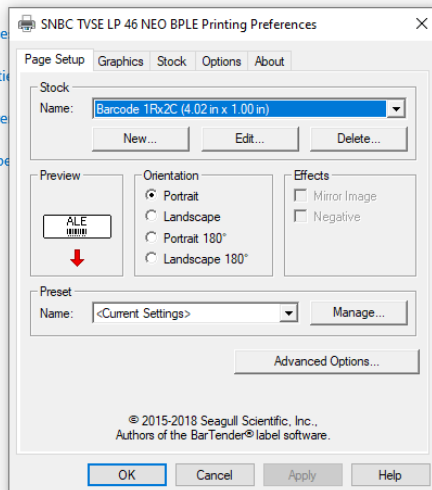
(while click on printer preference this will pop up)
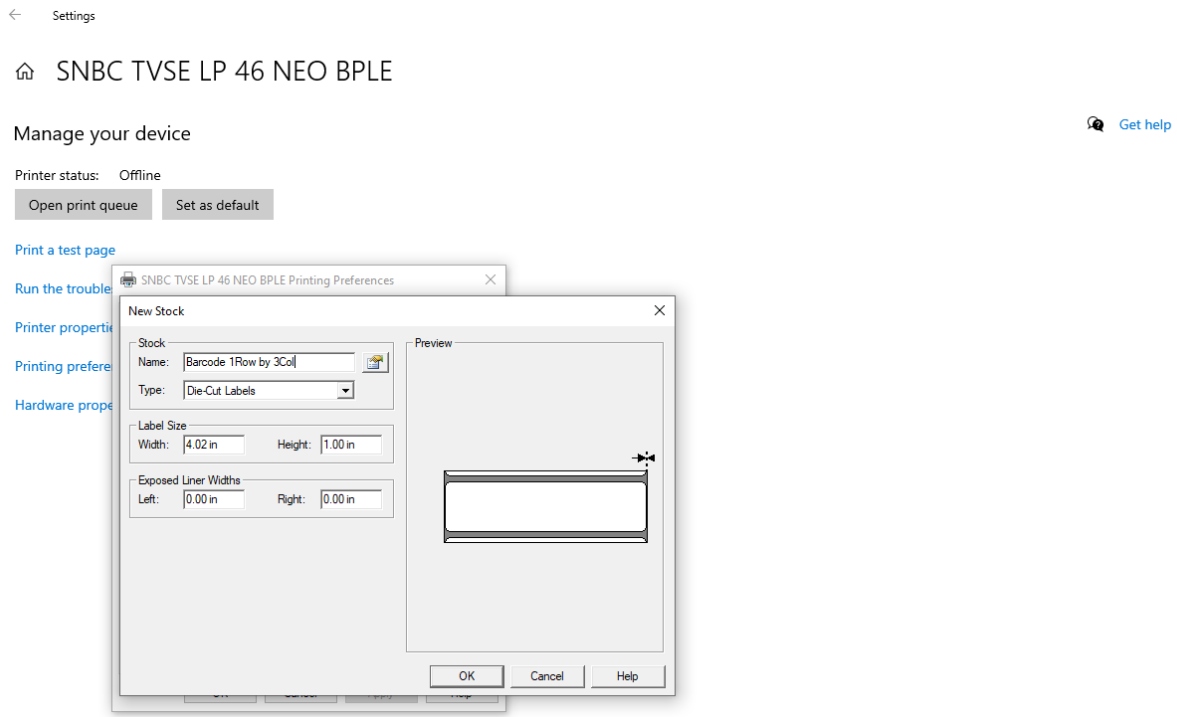
6. Under the setup section, click on the "New" option to configure the paper size.

7. A new window will appear when you click "New."

8. Rename the paper size as per your preference.

9. Set the paper type to "Die-Cut Labels."

10. Measure the length and height of your barcode paper and input the values accordingly.

11. Keep the "Exposed Liner Width" set to 0.00 inches for both the left and right margins.

12. Click "OK" to save the configuration.

Follow these steps to properly configure your barcode printer for optimal performance.

4.2 Bulk Excel Upload
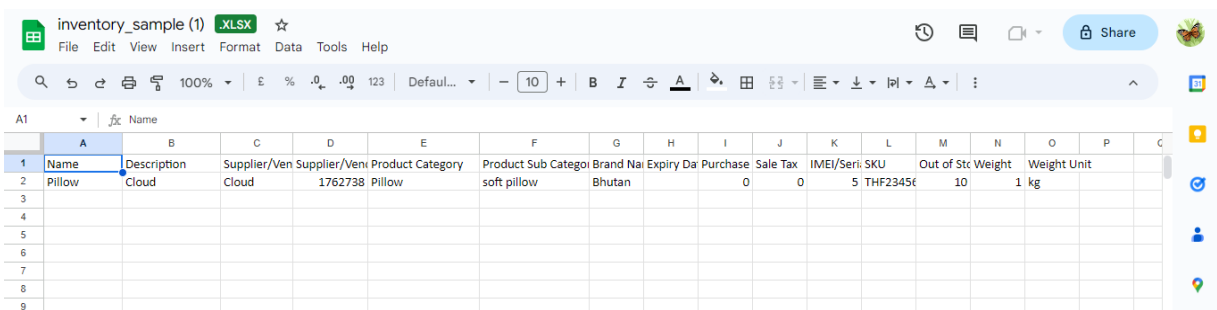
Admin can easily build up inventory by conveniently uploading data in bulk using the standard Excel Sheet template.

1. Click on the download option
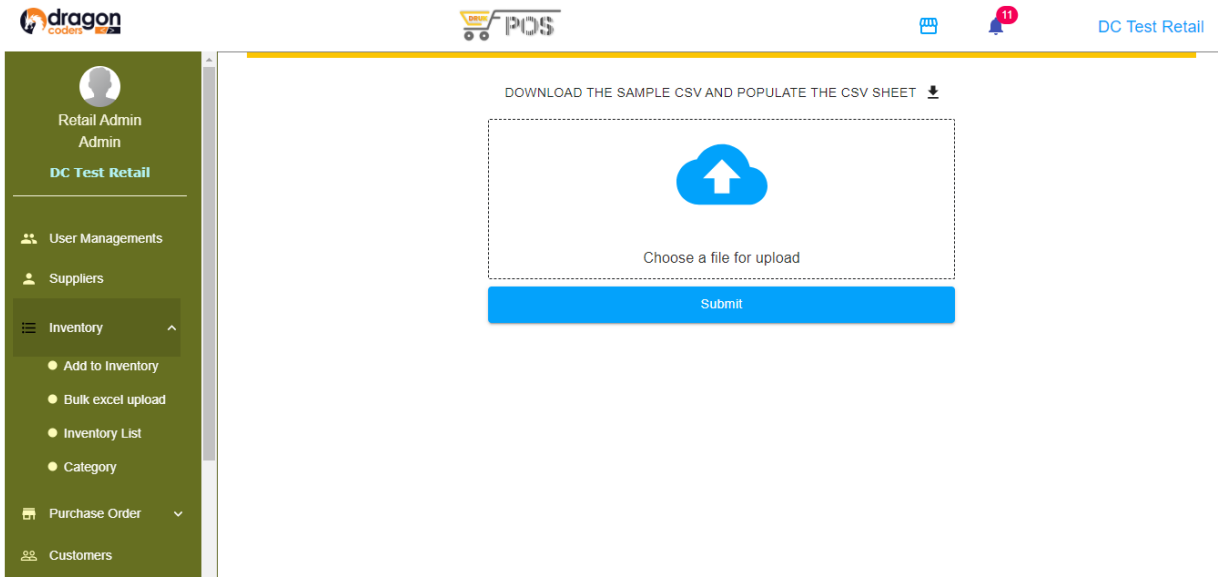
Picture 1.8

2. Enter all the inventories in the downloaded template and save it. (Downloaded Excel sheet will be as below *picture 1.9*)
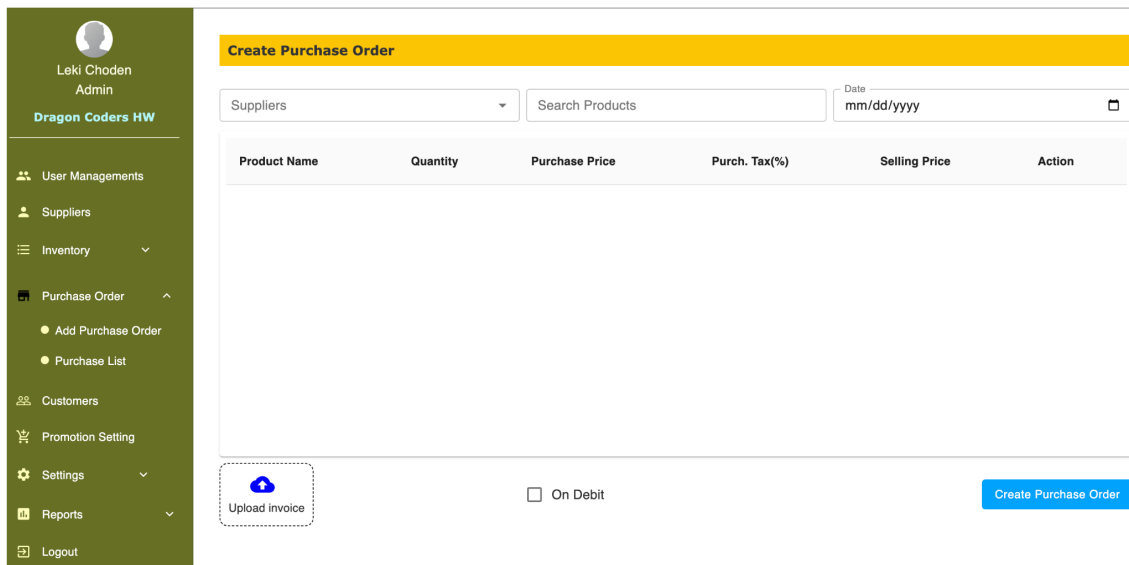

Picture 1.9

3. Upload the saved CSV sheet and click on the 'submit' button to add the product to the inventory list.

5. Purchase Order

Once the inventory database is ready with the stock details, the next step is to make purchase orders to update stock number, set purchase price and selling price.
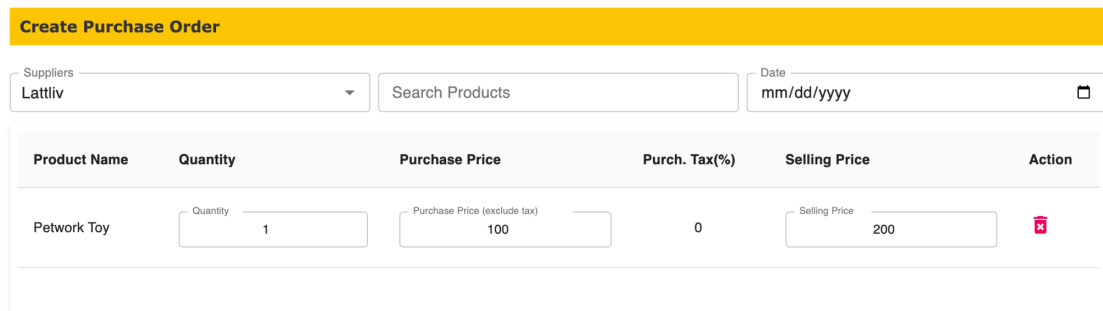
To create purchase order:

1. Click and expand "Purchase Order" on the main nav bar
2. Click on "Add Purchase Order"

Picture 1.9

Select a Supplier from the drop-down list.

3. Select products supplied by the Supplier
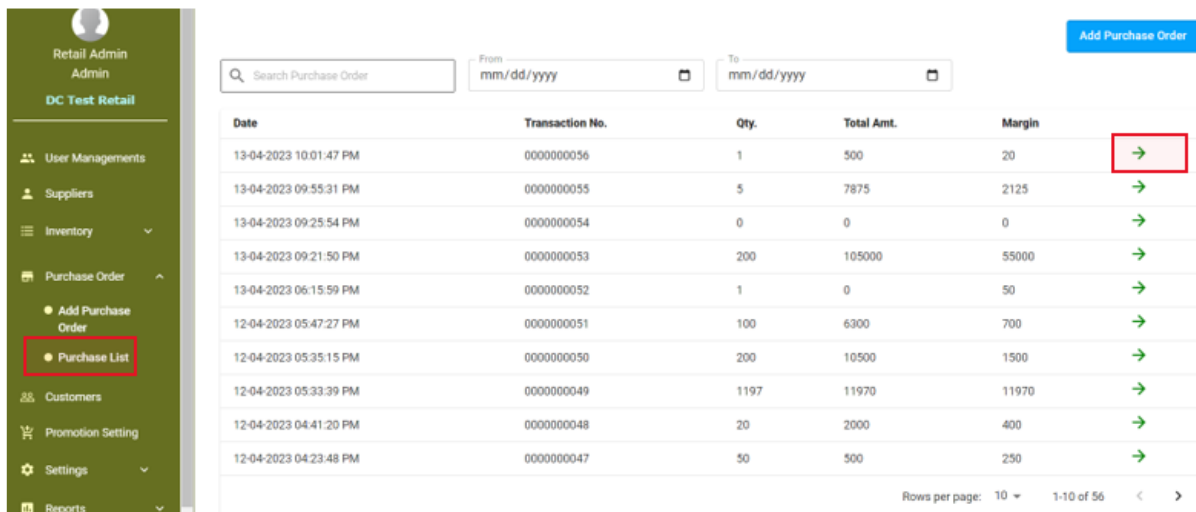
4. Mention date

Picture 2

5. Update quantity of product - this is the current stock

6. Mention the purchase price

7. Set the selling price

8. Click on "Create Purchase Order List"

5.1. Edit Purchase List

The Admin can edit and update the purchase list.
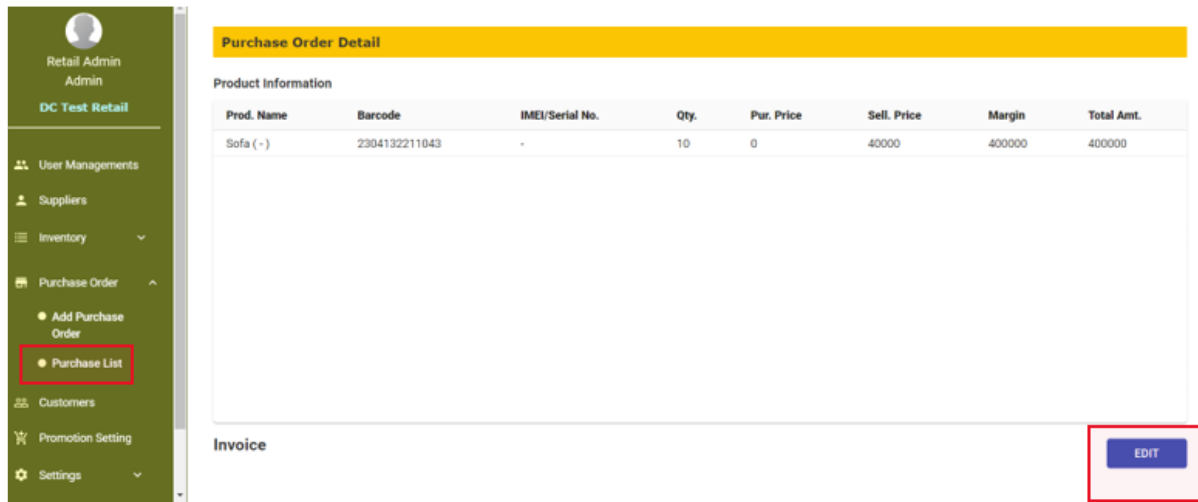
1. Click on the 'Purchase List'

Picture 2.1

2. Click on the 'right arrow' on the product that you want to edit.

3. Click on the 'Edit' button
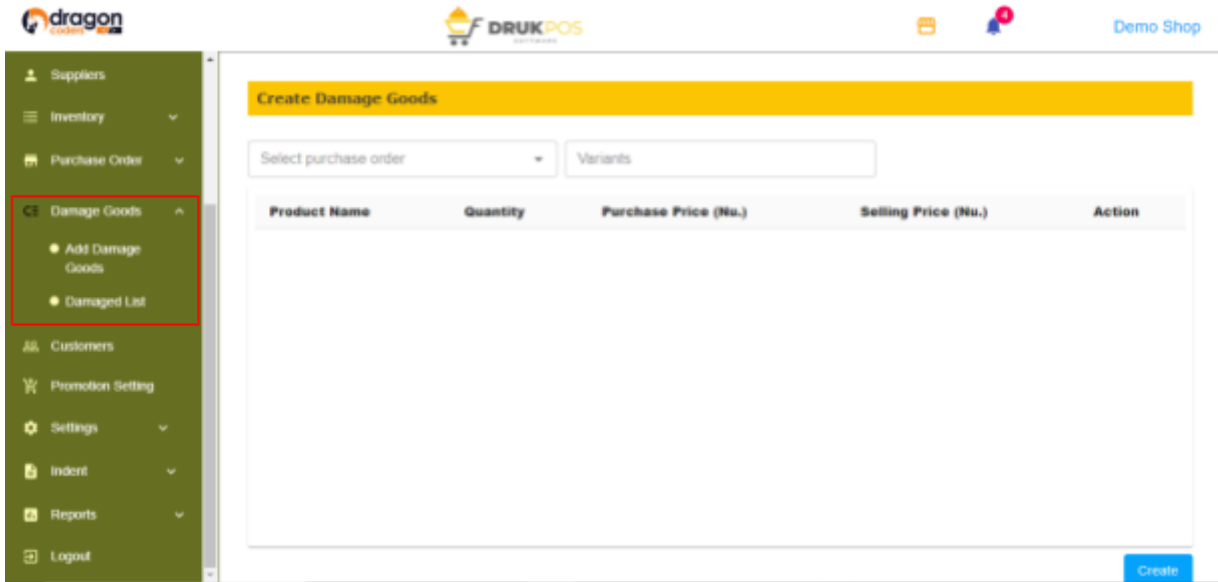
Picture 2.2

4. Edit the information

5. Click on 'Update Purchase Order'.

   The purchase order list will be updated.

6 . Damaged Goods

Some businesses might encounter the issue of receiving goods at their store and discovering damaged items that cannot be sold. So, in this case the admin can:

a. Create a list of damaged goods:

1. Click and expand Admin "Damaged Good" on the main nav bar

2. Click on "Add Damaged Good" and create a list of damaged items by entering their related purchase order info and total quantity. (*Once the quantity of those damaged items have been recorded, the stock count of those items will decrease automatically so that they cannot be sold*).
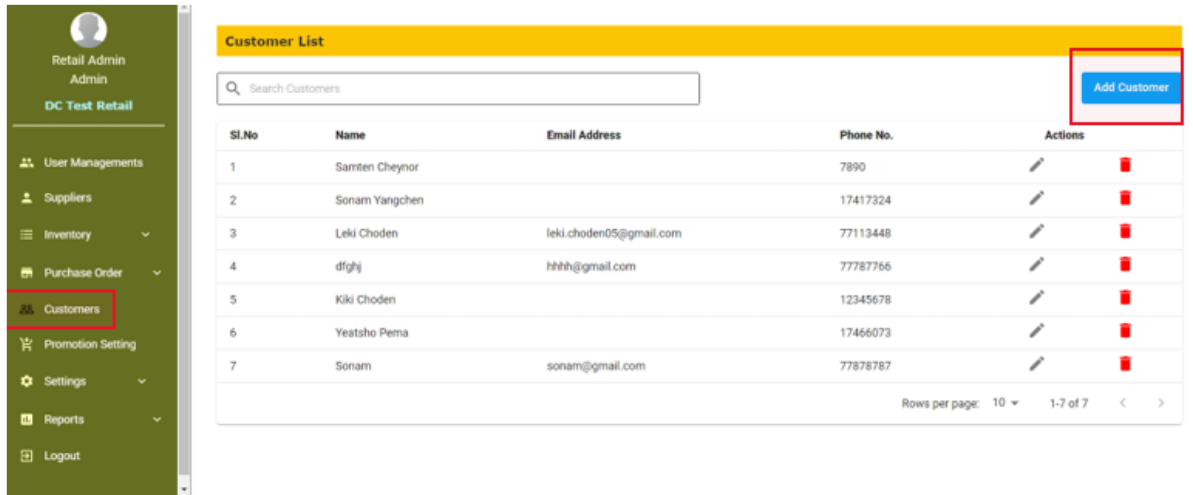
Picture 2.3

3. Users can search the damaged goods list by the transaction number of purchase orders, product name or product barcode number. (*The available quantity in the cashier window will not include those that are damaged, preventing cashiers from unintentional overselling*).

7. Customers

The Admin can create and maintain a database of the regular customers. To add a new customer:

1. Click on "Customers" on the main nav bar
2. Click on "Add Customer" button

Picture 2.4

3. Feed in customer details

4. Click on the "Add Customer" button.

   A new customer is added to the list.

8.Expenses

The Admin can add and manage expenses as following:

Step 1: Create category

a. Login as Admin

b. Expand expenses

c. Click on the "Expenses Category"

d. Click on the "Create Category" button.
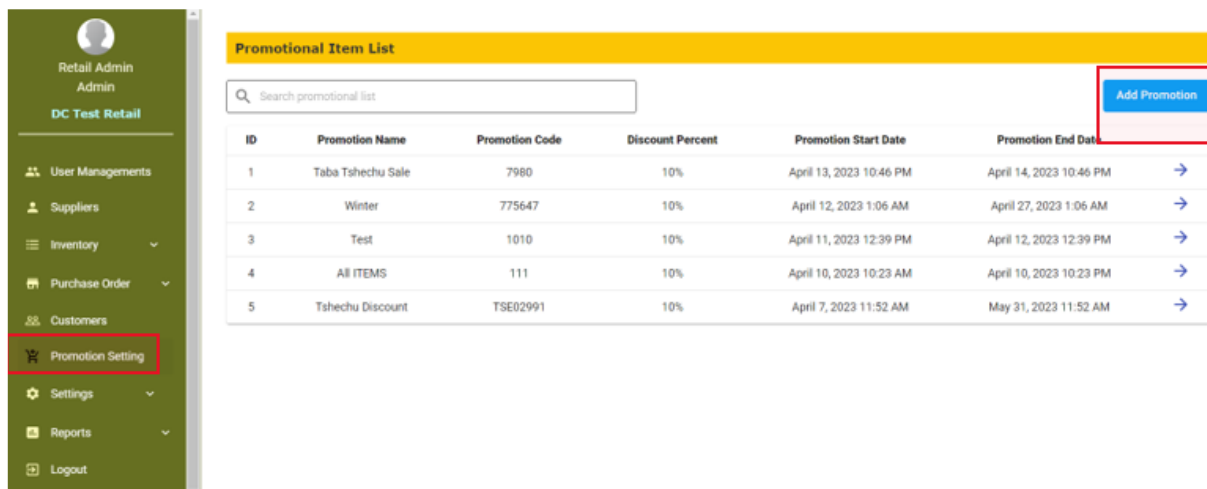
e. Fill in details.

Step 2: Add expenses

a. Expand expenses.

b. Click on "Expenses list".

c. Click on the "Add expenses" button.

d. Fill in details.

e. Click on the "Create Expenses" button.

(Check expenses report)

9. Set Promotion

The Admin can create and set discount % offers on selected items during sale

promotion periods. The % discount will apply uniformly to the selected items under the
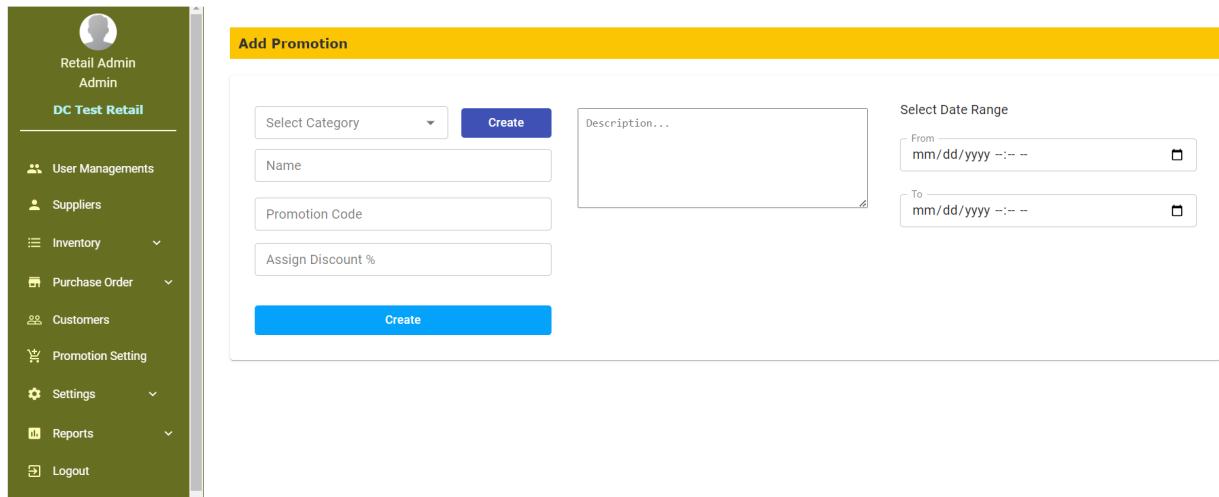
selected promotion category.

- Click on 'Promotion Setting' on the main nav bar

Picture 2.5

- Click on 'Add Promotion'. This will let you create a promotion offer bucket to

  which you can add items for sale at that particular % discount offer:

Picture 2.6

- ○ Select Promotion Category if already existing. If not, create a new one by clicking on the "Create" button.

- ○ Give a name to your promotion sale

- ○ Give a unique promotion code

- ○ Assign % discount that will be applied to the items listed in the promotion bucket

- ○ Give start date and end date of the promotion period. The promotion will take effect only from the set date and time.

- • Click on "Create"
- • Tick on the product names and follow the arrow direction to move the products in and out of the Promotion Bucket.
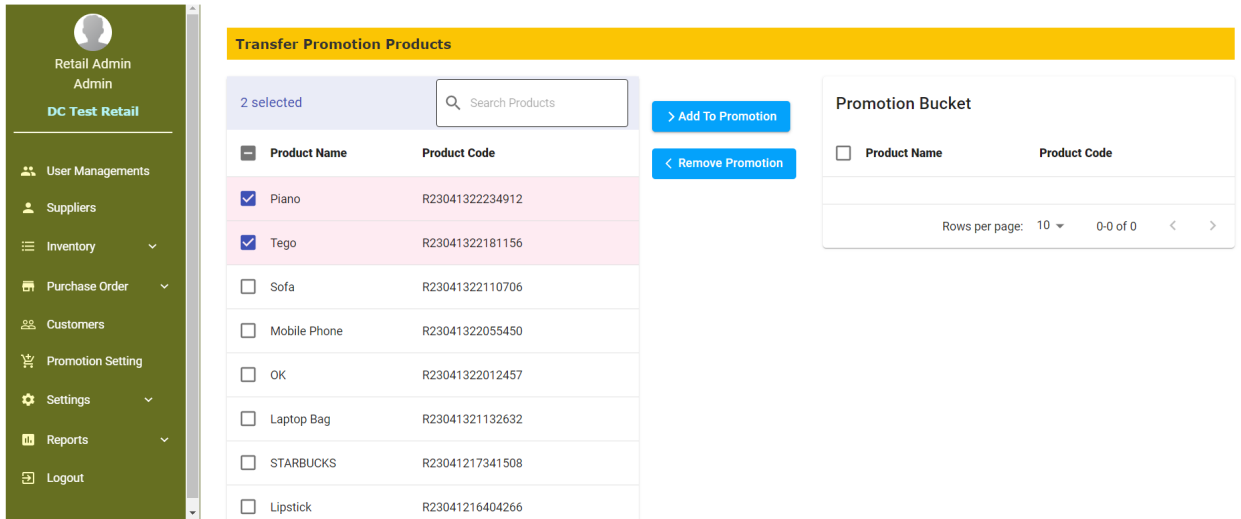
Picture 2.7

- Click on the "Save" button to save the promotion settings.

9.1 Active and Expired Promotion

The system will distinguish between active and expired promotions. Users can navigate to the expired column directly to check whether the promotions are active or expired.
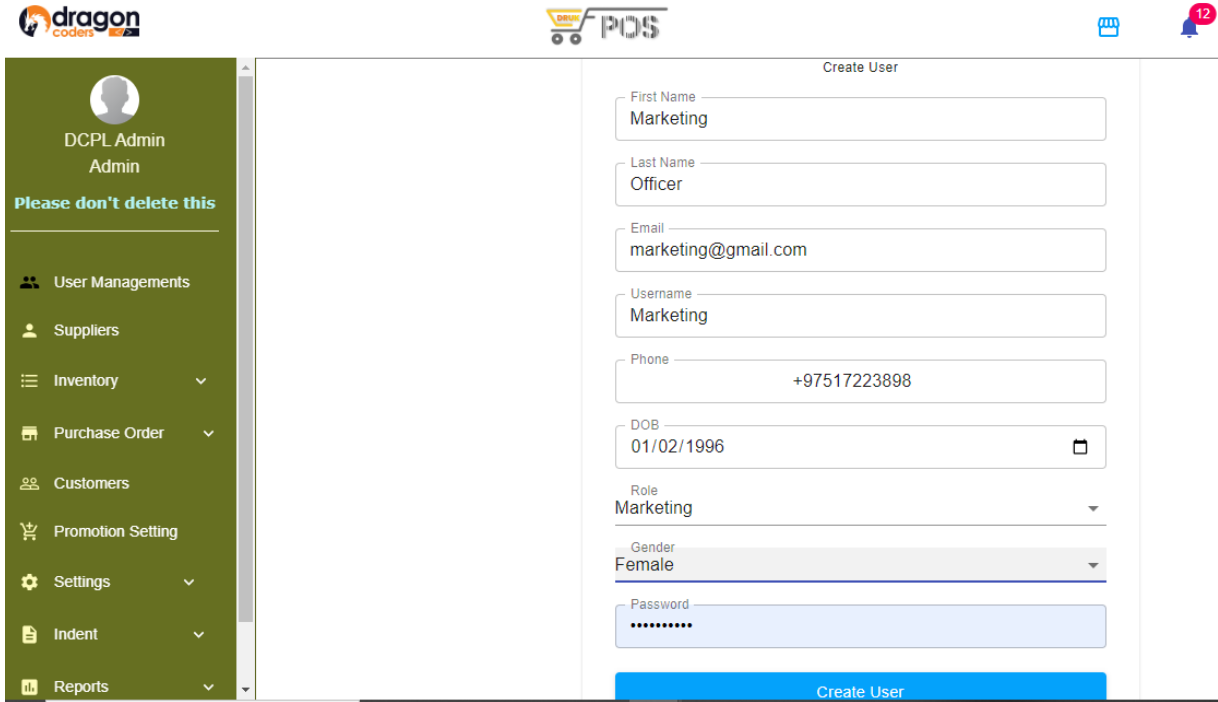
10.Indent/Order Process Management

It is a process in which your Marketing Officers make a list of the orders/indents from the customers in bulk and submit to the Admin for approval of the list.

Indent management process flow:

1. Admin creates a new user and assigns the role of Marketing.
   a. Login as Admin
   b. Go to User Management
   c. Click on Create User
   d. Feed in details
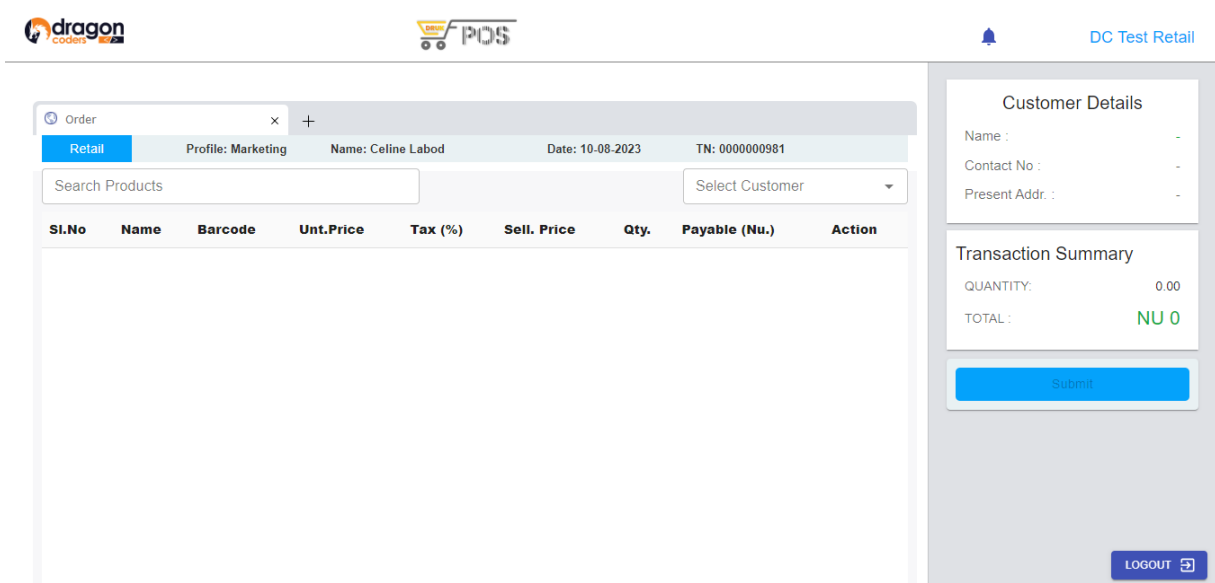   e. Assign role as 'Marketing'

f.   Click on the Create User button.

Picture 2.8

2.   Marketing Dashboard - Create Indent List

    a.   Login with the credentials created in step 1.

    b.   Select products and their quantity

    c.   Select/choose a customer from the drop down list

    d.   Click on the Submit button.

Picture 2.9 (Marketing Dashboard will look like this)

3. Admin Dashboard - Approval of Indents

    a. Click on the Indent menu

        i. Click on the New Indent

        ii. Click on the Requested Indent

        iii. Click on the Approve button
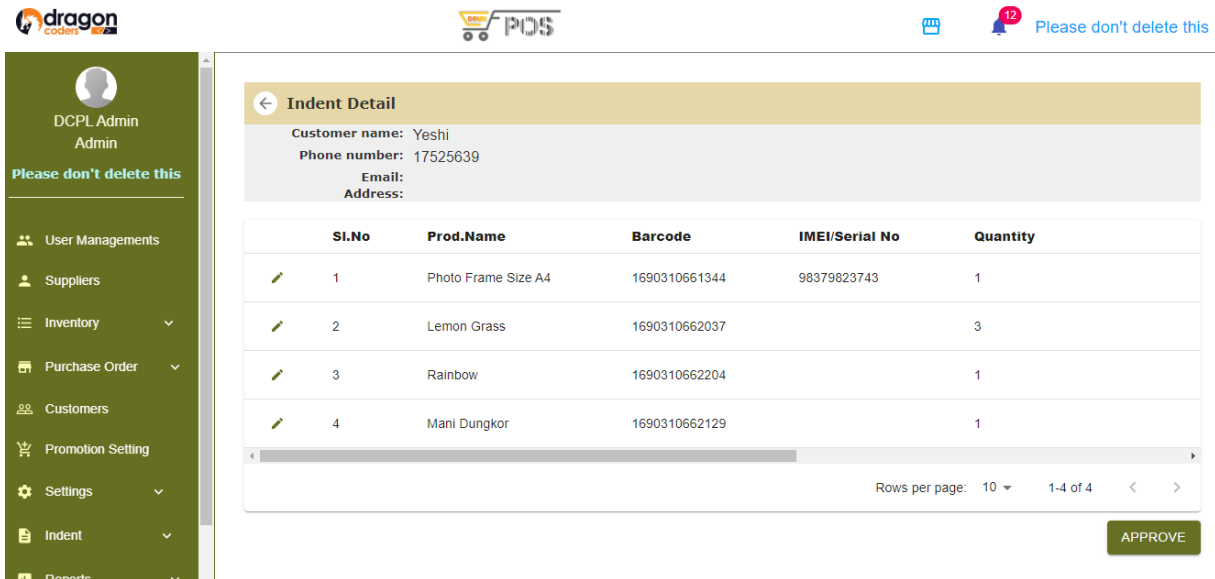
Picture 3.0

4. Cashier Dashboard - Confirm Orders & Check Out Sales

a. Click on the Indent List button available on the top left
b. Click on Confirm button to confirm indents to the check out list
c. Process to check-out sales as usual.
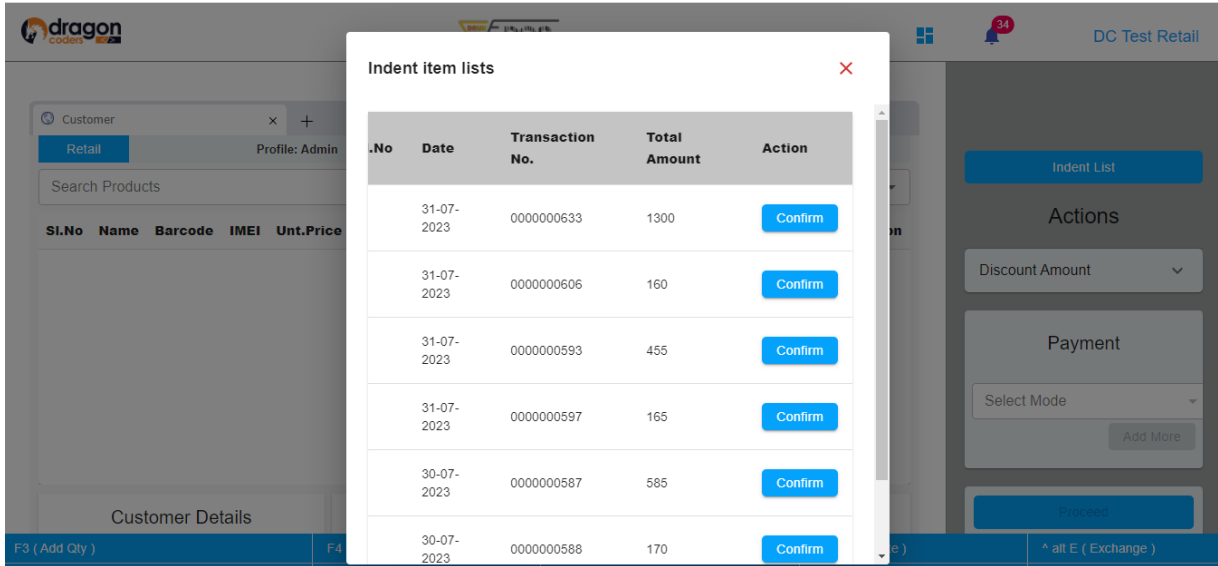
Picture 3.1 (cashier can click on the confirm button to confirm indents to the check out list)

11. Reports

Various reports can be generated and viewed for accounting purposes. Click and expand the "Reports" on the main nav bar.

a. Purchase Report

Purchase order reports can be searched based on Supplier. The report can be further viewed on product level.

b. Stock Report

Under the stock report, you will be able to view the total number of stock in ,
stock out, stock balance. Stock reports can be searched by product name. Click
on the down-arrow button to view reports on sub category level.

Stock Report					
Category Name	**Stock In**	**Stock Out**	**Stock Balance**	**Value (Nu)**	
S9 series	50	6	44	264,000	⌃

Sub Category

Name	Stock In	Stock Out	Stock Balance	Value (Nu)	Action
Silver Sleek	50	6	44	264,000	→
Grand Total:	**50**	**6**	**44**	**264,000**	

Rows per page: 10 ▾ 1-1 of 1 ‹ ›

Perishable	500	2	498	24,900	⌄
clothes	550	9	541	358,000	⌄
fizzy drinks	30	10	20	1,100	⌄
noodles	100	0	100	3,500	⌄

Picture 3.2

c. Products Sold

List and view products sold report. You can search the report by product, filter by
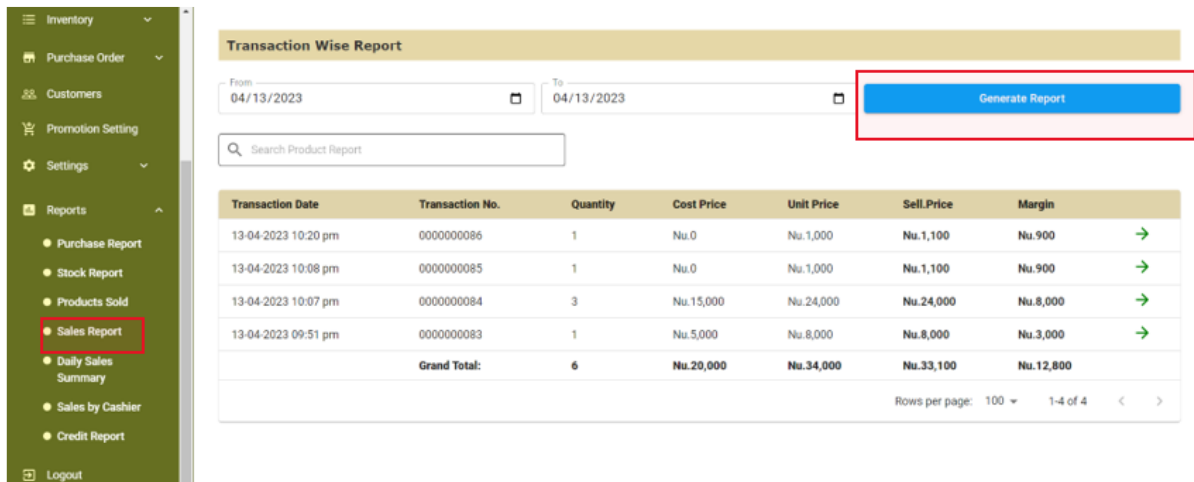date range and supplier list.
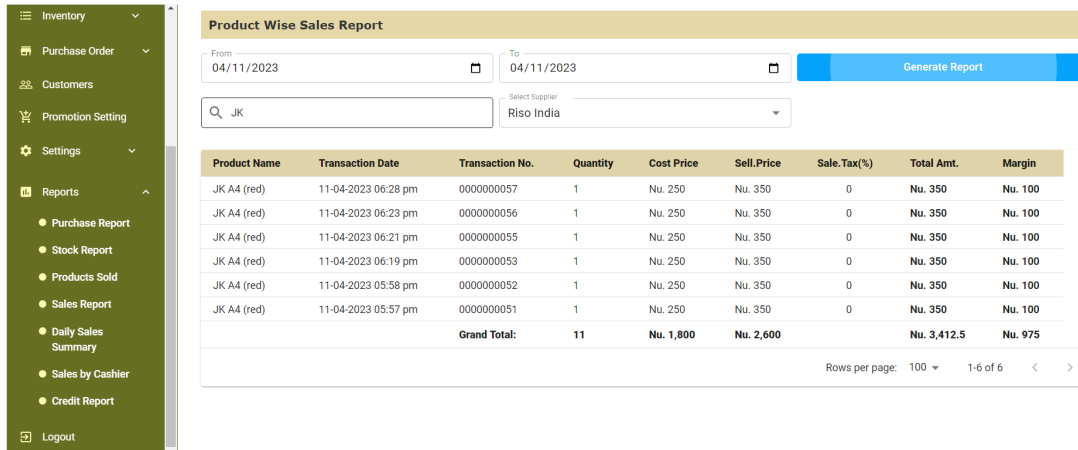
Picture 3.3

d. Sales Report

View sales report by transaction. You can filter through the report by date range.

Click on the right arrow to view details.

Picture 3.4

View details and print receipt by clicking on the Print function

Picture 3.5

e. Daily Sales Summary Report

The daily sales summary report gives a quick glance of the sales made on a day. Today's report will be displayed by default but the Admin can pick a date to check sales made on a particular day.
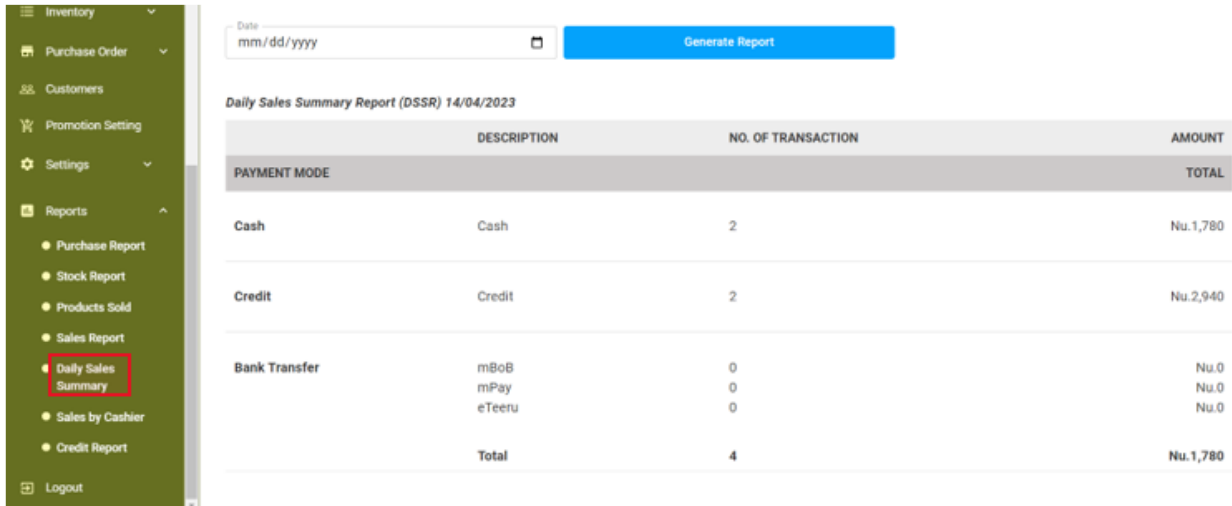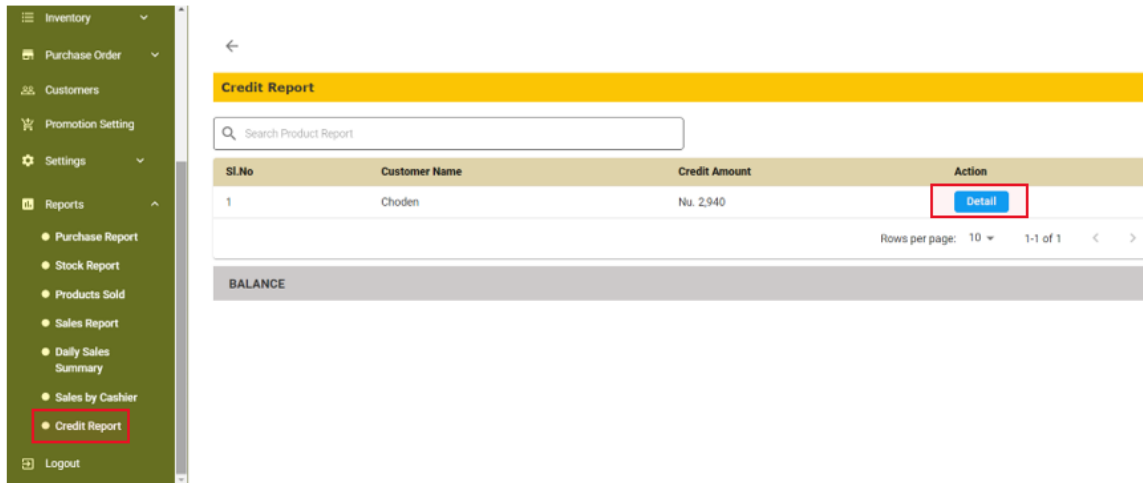
Picture 3.6

f. Sales by Cashier

View report of sales made by Cashiers. The report can be filtered by date range. Cashier names and corresponding details of transactions carried out by the Cashiers can be seen.

g. Credit Report

Credit Report: The Admin can check reports of sales made on Credits.

   a. Click on the "Credit Report" on the main menu bar. You can check names of the customers who have taken items on credits and the credit amount due.
   b. Click on the action button "Detail" to check details.

Picture 3.7

c. Click further on the action button "Detail" to record payment. You can print the bill. Credit report is not editable.
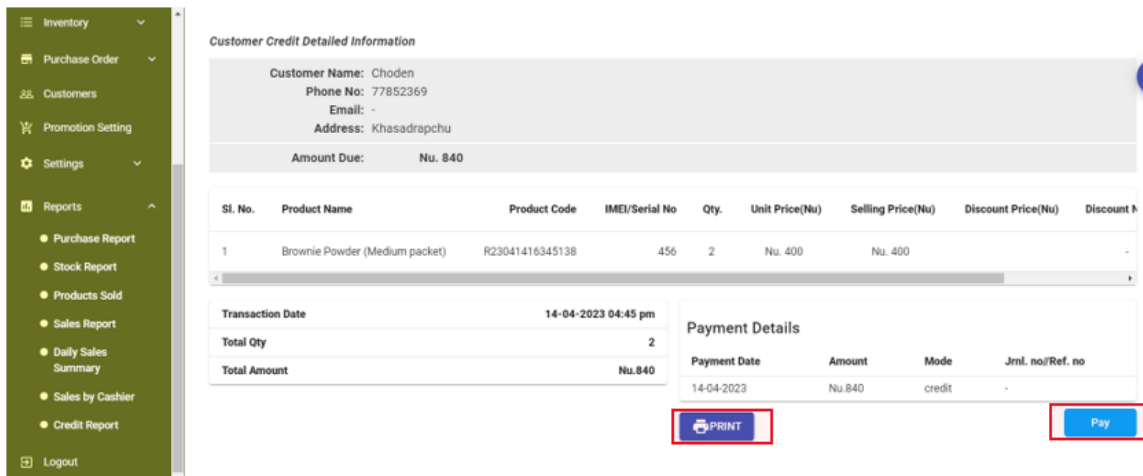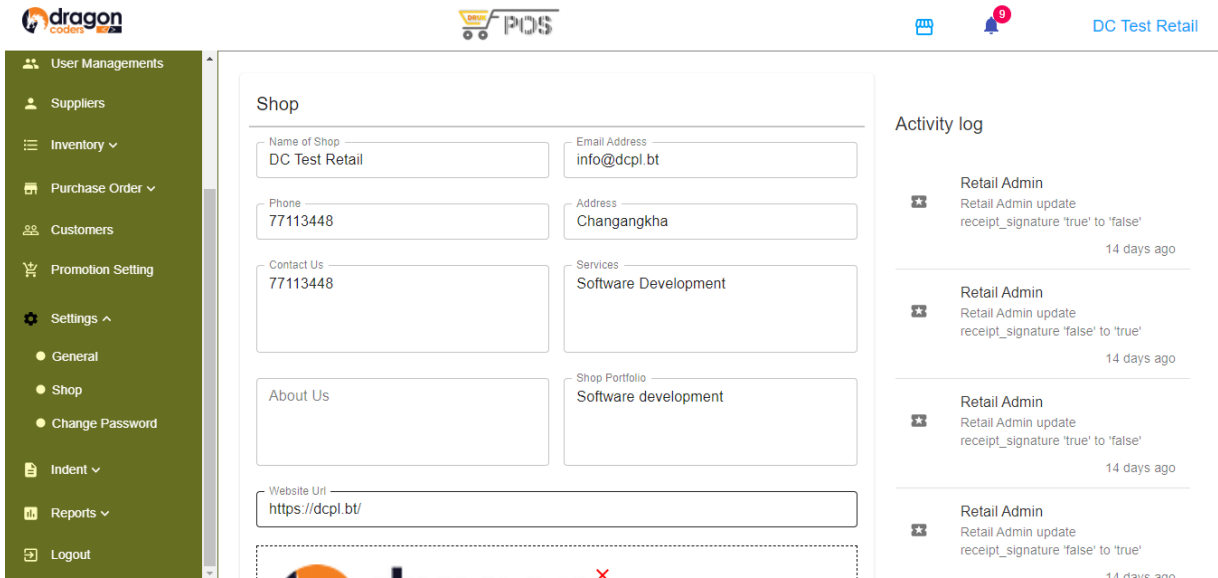

Picture 3.8

11. Settings

- Under Settings, you can:

    1. Set up your shop with shop information. Upload shop logo and provide website URL, if available.

2. Reset/Change password

Picture 3.9

● Under setting, admin have the option to include a signature space on bills or receipts.

To enable the Signature feature for bills/receipts, follow these instructions:

1. Navigate to the "Settings" or "General Settings" section
2. Click on the checkbox to enable space for signatures on bills/receipts.

Users can also choose to print SKU numbers on the barcode sticker by:

a. Navigate to the "General Settings" under the Setting side menu.
b. Look for the option to "Show SKU on Barcode"
c. Click on "Yes."

The SKU numbers will be printed on the barcode labels.