‘SALES DRIVE’

By iNFOTYKE

(www.salesdrive.in)

TOTAL CONTROL OF YOUR SUPPLY CHAIN = INFOTYKE

EFFECTIVE INVENTORY MANAGEMENT IS ALL ABOUT KNOWING WHAT IS ON HAND, WHERE IT IS IN USE, AND HOW MUCH FINISHED PRODUCT RESULTS.

SALES DRIVE solution is web based (**SaaS** - Software-As-A-Service) application that helps you to manage your stock. Update stock, purchase and sales from anywhere, Office, Home, Warehouse or on the go. You only need internet connection for it. It has built-in Invoice and Inventory System. Invoice System has Tax and Discounts. Tax rates and discounts will help to add taxes and discounts automatically to quotations/invoices and option to generate invoice from quotations. Manage multiple warehouses with SALES DRIVE and Advance reports for annual overview chart, stock value chart, Daily and Monthly sales calendar, Custom sale and purchase reports and product alerts.

Features of SALES DRIVE

All of the functionality is available with the following enhancements:

- **Dashboard**
- **Products**
    - List Products
    - Add Product
    - Print Barcodes
    - Print Labels
    - Import Products
    - Update Price
    - Quantity Adjustments
- **Sales**
    - List Sales
    - Add Sale
    - Add Sale by CSV
    - Deliveries
    - Gift Cards
    - List Return Sales
- **Quotations**

  - List Quotation
  - Add Quotation
- **Purchases**
  - List Purchases
  - Add Purchase
  - Add Purchase by CSV
  - Expenses
  - Add Expense
- **Transfers**
  - List Transfers
  - Add Transfer
  - Add Transfer by CSV
- **People**
  - List Users
  - Add User
  - List Billers
  - Add Biller
  - List Customers
  - Add Customer
  - List Suppliers
  - Add Supplier
- **Notifications**
- **Settings**
  - System Settings
  - Change Logo
  - Currencies
  - Customer Groups
  - Categories
  - Tax Rates
  - Warehouses
  - Email Templates
  - Group Permissions
  - Backup Database
- **Reports**
  - Overview Chart

- Warehouse Stock Chart
- Product Quantity Alerts
- Product Expiry Alerts
- Products Report
- Daily Sales
- Monthly Sales
- Sales Report
- Payments Report
- Profit and/or Loss
- Purchases Report
- Customers Report
- Suppliers Report
- Staff Report

YOUR SALES DRIVE COMPONENTS: Details.

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.

User/Staff rewards are available.

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

Billers

Billers are the selling companies, you can sell/quote/invoice your customers with any biller, means you can have multiple companies 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, purchases of the items that you/your companies 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 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.

The inputs for customer in other modules are no more select/drop down but ajax calls, you can type in search filed 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 then normal price.

Suppliers

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

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.

The inputs for supplier in other modules (purchases and products) are no more select/drop down but ajax calls, you can type in search filed 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. There are new menus for each product on List Products page.

Product Details:

A new page has been added to display the products details.

1. **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.
2. **Edit Product**:
   To edit product details.
3. **Set Rack**:
   To set/change product rack (only available if warehouse selected).
4. **View Image**:
   View the main product images, this is already shown in the image column.
5. **Print Barcode**:
   To print the product barcodes, If your product has variants, then there will be 2 barcode. One for

product code and second for product with option. You can print this with any laser print and scan second one to add the product with that variant.

6. **Print Label**:
   To print the product labels, If your product has variants, then there will be 2 barcode. One for product code and second for product with option. You can print this with any laser print and scan second one to add the product with that variant.
7. **Add Damage Quantity**:
   To add damage product.
8. **Delete Product**:
   To delete the product.

There are 4 types to choose for the product,

i. **Standard**: These are the standard product like phone, ram, speakers etc.
ii. **Combo**: These are products that consist of more that 1 product in your stock like computer with Casing, RAM and Speakers as combo items.
iii. **Digital**: These are the digital products that can be downloaded only like software, movies, pdf tutorials etc.
iv. **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: This module has new option for 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 products will show the new barcode image if there is variants available for the product. This will help you to manage the products well especially for those who need to track the products attribute i.e, sizes and color etc.
If your product have 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.

Barcodes and Labels: To print the barcode images with product variants, you need to print for a single product, with product actions or the link on product detail 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.

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 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 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.

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 have 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 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 to and are similar to 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 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 statuses

1. **Pending:** The sale is added but the items have 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 statuses

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 needs 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. To add the product to the order list manually, this won't be added to the database but only to the sale.
2. 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

Under Quotations modules add quotation page 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.

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 statuses

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 have be subtracted from sending rehouse and add/update in the destination warehouse.

Settings

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.

1. **Site Configuration**

- **Site Name:** Input for the site name (whatever you want to call this system).
- **Language:** Option to select system default language.
- **Default Currency:** Option to select system default currency (THIS SHOULD BE SAVED BEFORE ADDING ANY DATA).
- **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.
- **Default Email:** Input for system default email, all email will be sent from this email address.
- **Default Customer Group:** Option to select default customer group.
- **Maintenance Mode:** Option to enable or disable offline mode.
- **Theme:** Option to select theme.
- **Login Captcha:** Option to enable login captcha.
- **Rows per page:** Option to show the no of record in table on each listing page.
- **Date Format:** Option to select date format.
- **Timezone:** Option to choose your timezone. This is AC input just type your continent/city and choose it fro suggestion.
- **Allow Registration:** Option to allow customer to register account.
- **Registration Verification:** Option to enable email verification for customer register accounts.
- **Registration Notification:** Option to enable notifications for registration.
- **Calendar:** Option to choose calendar privacy, Shared or Private.

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

2. **Products**

- **Product Tax:** Option to enable/disable product level tax.
- **Racks:** Option to enable/disable product rack feature.
- **Product Variants:** Option to enable/disable product variants (attributes) feature.
- **Product Expiry:** Option to enable/disable product expiry date feature.
- **image Size:** Option to set image sizes that can be uploaded
- **Thumbnail Size:** Option to set thumbnail size (50-80).
- **Watermark:** Option to enable/disable watermark on product images, water mark text will be your site name.

3. **Sales**

- **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).
- **Reference Format:** Option to select the reference format.
- **Order Tax:** Option to enable/disable order level tax.
- **Product Level Discount:** Option to enable/disable product level discount.
- **Product Serial:** Option to enable product serial input on sale.
- **Auto Detect Barcode:** Option to enable/disable auto detection for barcode.
- **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.
- **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.
- **Invoice View:** You can switch the invoice layout to Standard or Tax Invoice.

4. **Prefix**

- **Sales Reference Prefix:** Option to set sale reference prefix.
- **Return Reference Prefix:** Option to set return sale reference prefix.
- **Payment Reference Prefix:** Option to set payment reference prefix.
- **Delivery Reference Prefix:** Option to set delivery reference prefix.
- **Quotation Reference Prefix:** Option to quotation sale reference prefix.
- **Purchase Reference Prefix:** Option to set purchase reference prefix.
- **Transfer Reference Prefix:** Option to set transfer reference prefix.

5. **Money and Number Format**

- **Decimals:** Option to set number of decimals, 0 to disable decimals.
- **Decimals Separator:** Option to set decimals separator.
- **Thousand Separator:** Option to set the thousands separator.

6. Email

- **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

You can manage currencies, categories, sub-categories, taxes, warehouses, customer groups, email templates, user groups and permissions. In the admin area all the price 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. **Product Quantity Alerts:** The list of products that are reached the alert quantity and need to be purchased.
4. **Product Expiry Alerts:** The list of products that are about to expire in less that 90 days.
5. **Product Reports:** For customized product report, you can click the icon at page menu for customize the report.
6. **Daily Sales:** Calendar with daily sales
7. **Monthly Sales:** Calendar with monthly sales
8. **Sales Report:** For customized sales report, you can click the icon at the page menu for customize the report.
9. **Payment Report:** For payment report, you can click the icon at the page menu for customize the report.
10. **Profit and/or Loss:** Profit and/or Loss report for the selected time frame (date range).

11. **Purchase Report:** For customized purchase report, you can click the icon at the page menu for customize the report.
12. **Customer Report:** For customer report, you can click the icon at the page menu for customize the report.
13. **Supplier Report:** For supplier report, you can click the icon at the page menu for customize the report.
14. **Staff Report:** For staff report, you can click the icon at the page menu for customize the report.

Hardware

1. Receipt Printers:

We have tested the update with Bixolon SRP-350II (USB) with Web Browser Printing and Java Applet by adding qz print plugin that will support these printers

- Samsung Bixolon SRP350plus, Bixolon SRP-350II and Bixolon SRP-270.
- Telly Dascom 1125 (USB)
- Epson Thermal Printer (COM)
- Eltron P310i
- Zebra GK420, Zebra P310, Zebra LP 2844 and Zebra TLP2844
- Citizen CT-S2000 (USB)
- DOS/LPT1 Printing
- Print directly to file: i.e. \serverprinter
- Nippon Primex
- Essae PR-85j
- Bematech MP200

Bixolon printers will work fine however you might need to change some commands for other printers. Please be informed that we can't provide support regarding any issues with plug-in. You will need to manage it by yourself.

2. Barcode Scanners/Readers:

Any of the barcode scanners/readers will work fine with v3 as long as it can read accurately.

3. Magnetic Card Readers:

Most of the Magnetic Card Readers will work fine. We have tested this with **Uniform MSR213 Magnetic Stripe Card Reader** (USB - 3 Track Reader).
For tablet/mobile card readers: No such feature and recommendation yet.

4. Cash Drawers:

You should buy the cash drawers that can be connected to pos printer. To use cash drawers, you printer should have the port to connect cash drawer as **Bixolon SRP350II**. **For Browser Print,** you might need to set your printer to open cash drawer before printing.

For Java QZ Print, It will be fine as cash drawer will be opened with printing and can be opened without printing.

5. For barcode and label printing:

Any desktop laser print will work fine.

ALWAYS PRO SUPPORT

At iNFOTYKE, we work as a team with our customers to solve your challenges. We feel highly privileged to attend to all of our customer's needs and requirements.

Chat online (**Skype**: iNFOTYKE or through our support portal) or talk with us directly (+91-9953-5858-01 / +91-9953-5858-02) to get help.

Support is also given via e-mail (support@infotyke.com), FAQs and support tickets.