TOF *Engineers and Consulting Ltd.*

# *Sales Manager: Sales Information Management System*

# User Manual

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# Important Information

**When using Sales Manager you must be mindful of the following.**

- **The default user is "mainuser" without a password (blank password). This user has full access to all functionality of the software.**
- **Make sure each newly created user specifies a password for his/her user name (user account) to prevent other users operating with the user account.**
- **Make sure you read the messages you are prompted with and provide judicious responses to them. Respond with a safe choice if you are doubtful and then seek advice.**
- **Make sure you backup regularly to protect against loss of data and make recovery after a loss less costly. Do backups regularly via "Sales Manager Backup" icon .**

# 1 Introduction

**Sales Manager** software is designed to manage customers and suppliers information, products inventory, sales and invoicing of a typical retail outlet or business involved in buying and selling. Sales Manager also tracks expenses and cash receipts of the business. Key modules are as follows

- Provision for registration of customers, suppliers and products list.
- Direct (Cash) Sales Management
- Credit Sales Management
- Expenses Management
- Services and Products Procurement Management

Sales Manager is developed in Microsoft Visual Basic 6.0, Microsoft VBA in Microsoft Access with SQL - Server database management system as the database platform. These tools supports graphical user interface and can run on a standard personal computer running Microsoft Windows XP operating system.

Sales Manager is configurable as a stand-alone system or a multi-user system on a network of computers such that multiple users can share application data from several workstations.

## 1.1 Sales Manager Software Modules

The key modules of **Sales Manager** appropriately relate these key entities in the modules

- Products Information
- Customers' Information
- Suppliers' information
- Direct Cash Sales
- Credit Sales
- Products and Services Procurements
- Expenses Charging
- Invoicing and Receipting,
- Pro-Forma Invoicing

The Sales Manager Database is resident on a computer dedicated as the server. All users of Sales Manager share this data across the network.

## 1.2 Sales Manager Software Architecture

- Multi-User, Client - Server Architecture.

## 1.3 Sales Manager Development platform

- Visual Basic 6.0 and Microsoft Access for program front-ends design
- Microsoft SQL-Server 2005 Relational Database Management System for database design.

## 1.4 Sales Manager operating platform

- A local area Ethernet 100 Base-T network (or wireless network) of computers running traditional Microsoft Windows 2000/XP based operating systems.

## 1.5 Sales Manager Key Modules

Sales Manager's key functional features are enumerated below according to the modules.

- Products Information
- Customers' Information

- Suppliers' information
- Direct Cash Sales
- Credit Sales
- Products and Services Procurements
- Expenses Charging
- Invoicing and Receipting,
- Pro-Forma Invoicing

### 1.6 Sales Manager Security & Confidentiality Module:

- No restriction on the number of users
- Each module has a set of privileges to which a user can be assigned.
- Each user is assigned privileges/roles for each user for each module.
- Total Control in security and access levels configuration suitable for your staff hierarchy.
- Ensures data integrity as the privileges of each user can be tailored to his\her work schedule.

### 1.7 Sales Manager General Features

- Easy to use with its user-friendly graphical user interface (GUI).
- Configurable as stand-alone system or a client/server multi-user environment.
- Sophisticated security system that ensures integrity and confidentiality of your mission critical information, by controlling access to both information and functionality.
- Generates a wealth of current and historical information in its databank, enabling derivation of statistical information to inform policy making, budgeting and planning
- Efficient and effective search engine to query the databank.
- Maintains a concise audit trail of operational activities.
- Exporting of all reports to remote locations as attachments to e-mail.

### 1.8 Guideline to this document

This document describes how to use Sales Manager. It will, however, be valid for versions that would have been tailored to your environment. Furthermore, the words **interfaces** and **forms** are both computing terminologies describing the visual displays on the screen that users interact with; they will be used freely and interchangeably in the document.

**To quickly grasp the concepts and procedures presented in this document, it is recommended you initiate a session of Sales Manager on the computer in parallel to studying this document.**

# 2 Sales Manager Overview

## 2.1 Security and Confidentiality

Users are created to access Sales Manager and each user in assigned a

- **security level**, which determines the type of operations (additions, modifications, deletions) that can be performed on data; and a
- **module access level**, which determines the modules that the user can access

## 2.2 Menus

| Menu | Item | Purpose |
|---|---|---|
| **File** | | |
| | Page Setup | |
| | Print | |
| | Change Password | |
| | Set Current User's Privileges | |
| | Connect To Datasource | |
| | Create Users and Assign Privileges | |
| | Audit Trail | |
| | View Defaults | |
| | Export Information | |
| | Main Switchboard | |
| | Exit | |
| **Operational Data** | | |
| | Set Transaction Date | |
| | Specify Expense Folio | |
| | Charge Account Codes | |
| | Expense Codes | |
| | Operational Defaults | |
| | Units Bases | |
| | Units Categories | |
| | Units of Storage of Drugs | |
| | General Operational Data | |
| **Products Information** | | |
| | Products Groupings | |
| | Products List | |
| | Products Full Details (Data Entry and Modifications) | |
| | Products Search | |
| | Products Packages Names | |
| | Products Packages Details | |
| | Product\Stock Registration | |
| | Product\Stock Movements and Bin Cards | |
| | Pro-forma Invoices | |
| **Financials** | | |
| | Pro-Forma Invoices | |
| | Direct Cash Sales | |
| | Credit Sales | |
| | Products Procurements | |
| | Expense Account Charging | |

| | | |
|---|---|---|
| | Products Balance | |
| | Customers Balance | |
| | Suppliers Balance | |
| **Customers & Suppliers** | | |
| | Customers List | |
| | Customers Information (Data Entry and Modifications) | |
| | Suppliers List | |
| | Suppliers Information (Data Entry and Modifications) | |
| **Enquiries & Reports** | | |
| | Sales Invoices | |
| | Sales Receipts | |
| | Delivery Advices | |
| | Daily Reports | |
| | Monthly Reports | |
| | Yearly Reports | |
| | | |
| **Staff Details** | | |
| | Staff List | |
| | Staff Full Details | |
| | Staff Search | |
| **Info** | | |
| | About | |
| | Welcome | |

### 2.3 General interface layout

Interfaces \ forms used for data capture and modification have the following.

1. Buttons are at the footer of the interface to
    a. **Add**, initiates addition of a new record
    b. **Modify,** initiate modification of existing record in focus
    **c. Save,** to save new entries or modifications to data
    **d. Discard** to discard changes or new entries before it is saved**.**
    e. **Requery** to populate interface with all records of underlying table\query
    f. **Refresh** to update record in focus with new information

    Generally,
    - To add a new record, click Add (or New XXXX)
    - To modify existing record, move to the record, click Modify)
    - Click Save to save records (new or modified)
    - Click Discard to undo changes prior to saving the data.
2. Where appropriate, information are organised in tab pages labelled appropriately
3. A combo box is usually available at the header of the interface to locate specific record.
4. A button labelled Help is usually at the top of the interface to provide guidance to using the specific module.

### 2.4 Help facility on Sales Manager

To assist in using Sales Manager, you can view the operational and system manuals via the **Sales Manager** group created on the Programs menu on the Start Menu bar.

1. Select **Sales Manager** from the Programs menu on Start Menu bar

2. Select the document you want to view. This would display the required document in .pdf format (portable document format).
3. You can navigate/use the document as you normally use any similar document. You have the choices of
    - Sales Manager Installation Guide
    - Sales Manager User Guide
    - Customer Feedback Change Request
    - Customer Feedback Problem Reporting

You will require Microsoft Word and Acrobat Reader on your computer to view the files.

**Further more,** for ease of use, where appropriate, there is a **Help** button on specific Sales Manager interfaces that display information to guide the user on how to use the functions\facilities of the module.

# 3 Starting Sales Manager

To use Sales Manager for any useful work you should have done the following

- Installed Sales Manager on your computer and connected appropriately to the data source.
- Created user accounts that will use Sales Manager and define privileges for each user.
- Configured Sales Manager with operational data.

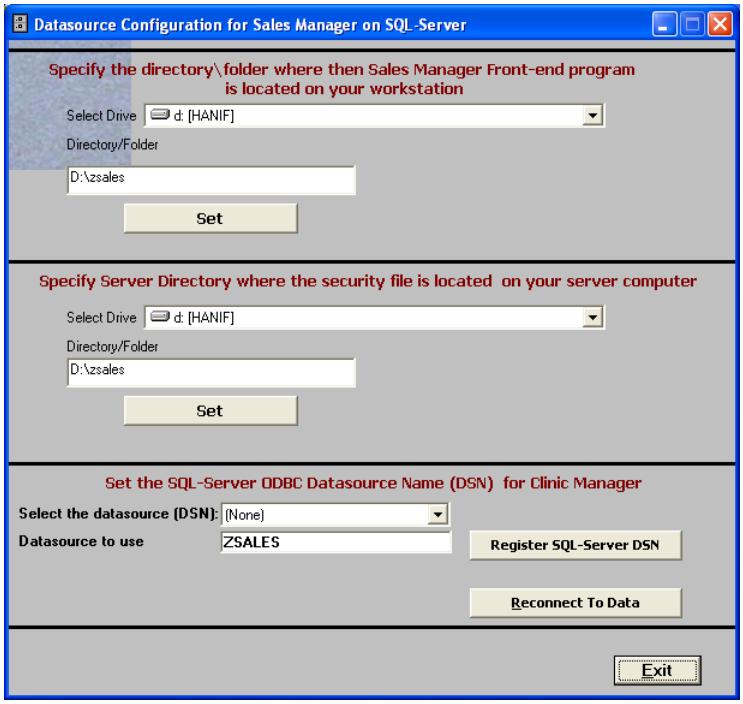
## 3.1 IMPORTANT:

- **The system administrator must use the default user "mainuser" as the user account to initially gain access to the software.**
- **After creating all users, the system administrator should specify a password to "mainuser" to prevent unauthorised access.**
- **Note that new users are created without a password (password is blank), therefore each user must specify his\her password for confidentiality.**

## 3.2 Connecting Sales Manager to datasource

After installing Sales Manager front-end module you must connect to the data source, which would have been defined as a data source name (DSN) via ODBC using SQL-Server ODBC driver.

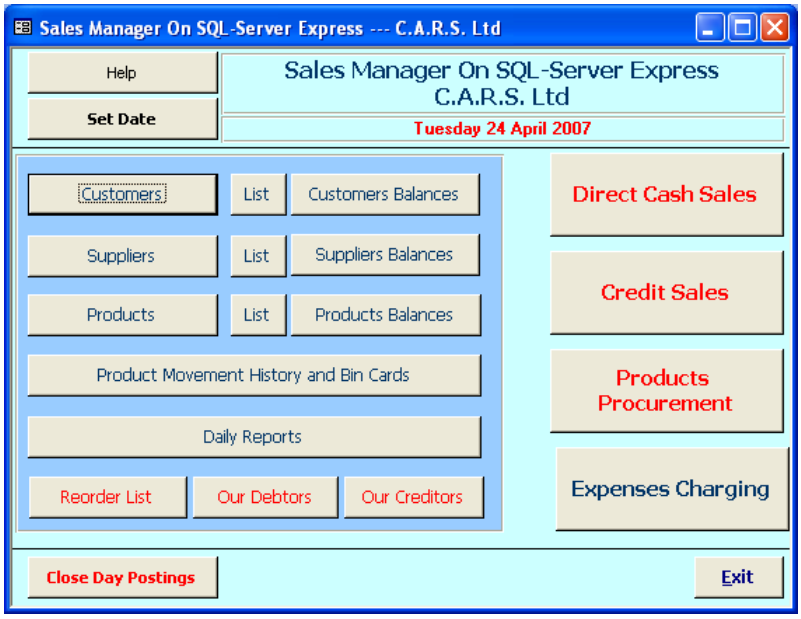
1. Select **Sales Manager** on the Start-Program bar, then select **Sales Manager** OR Double-click on **Sales Manager** icon on the desktop. This displays the Sales Manager Launcher.
2. Select **Utilities > Configure Datasource** from **Sales Manager Menu**..
3. Enter or browse for the folder where Sales Manager front-ends are installed; click **Set**.
4. Enter or browse for the older where the database files and security files are located on the server computer hosting the database; click **Set**
5. Select the **datasource** registered for Sales Manager datasource (e.g. **ZSALES**)
6. Click **Reconnect To Data**.
7. At the prompt enter your user name (and password, if required) then click OK.
8. You will be prompted appropriately on completion. Exit the interface and proceed to run Sales Manager.



### 3.3 To run Sales Manager

1. Select **Sales Manager** on the Start-Program bar, then select **Sales Manager** OR Double-click on **Sales Manager** icon on the desktop. The **Sales Manager Launcher** interface below is displayed.

2. Click **Click Here Launch Sales Manager On SQL-Server**. You will be prompted for a username and password.
3. Enter your user name and password (if you have defined one for your user name)
   a. If this is the first time, enter user name as **mainuser** with no password.
4. Click **OK**. The program will start displaying the main interface below




5. The System Administrator must create all the users of the software via the menu.
   **File->Create Users and Assign Privileges.**

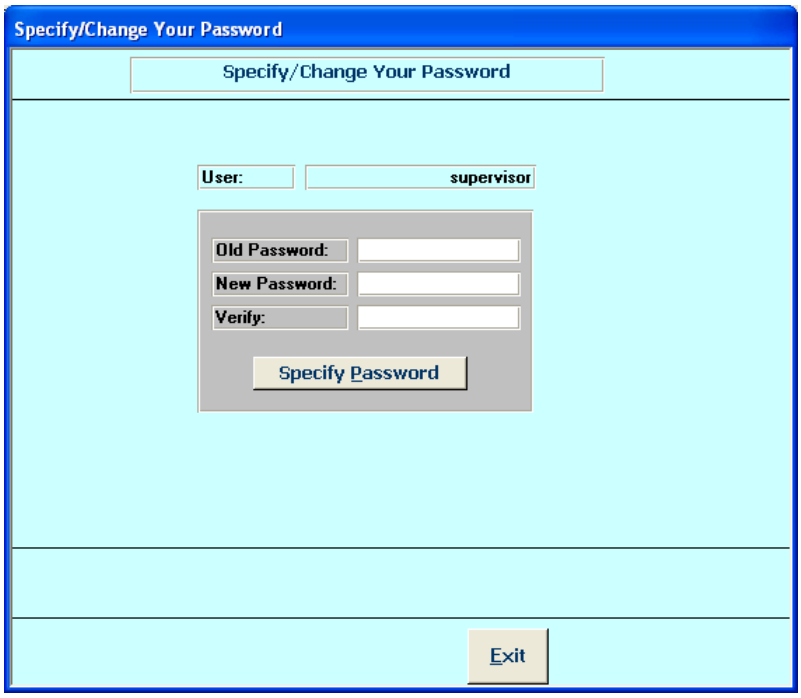
### 3.4 Specifying your password

**Before you continue to use Sales Manager for your operations, you must be aware that there is one function every registered user of Sales Manager can perform. This is to change his/her password. Passwords must be secret to the user; even the system administrator should not be aware of your password. The system administrator(s) can only clear your password, if you forget it, to allow you to specify another one.**

The procedure for changing your password is simple and is as follows:.

1. Select "**Change Password**" from the File menu on the main interface.
2. On the resulting enter your **Old Password** in the appropriate field (Leave blank if you do not have a password or you are specifying one for the first time).
3. Enter your new password in the field labelled "**New Password**"
4. Enter the new password again in the field labelled "**Verify**"
5. Click "**Specify Password**".
6. You will be prompted if the **New Password** and the **Verify** do not match exactly. You must re-enter both again to ensure registration of the password.

The next time you log on to Sales Manager, you will be required to specify this password with your user name to gain access.



# 4 System Administration Functions

The **System Administration** functions include the following operations.

- Set Current User's Privileges
- Connect To Datasource
- Create Users and Assign Privileges
- Audit Trail
- Defaults
- Backup
- Restore Backup
- Compact\Repair data

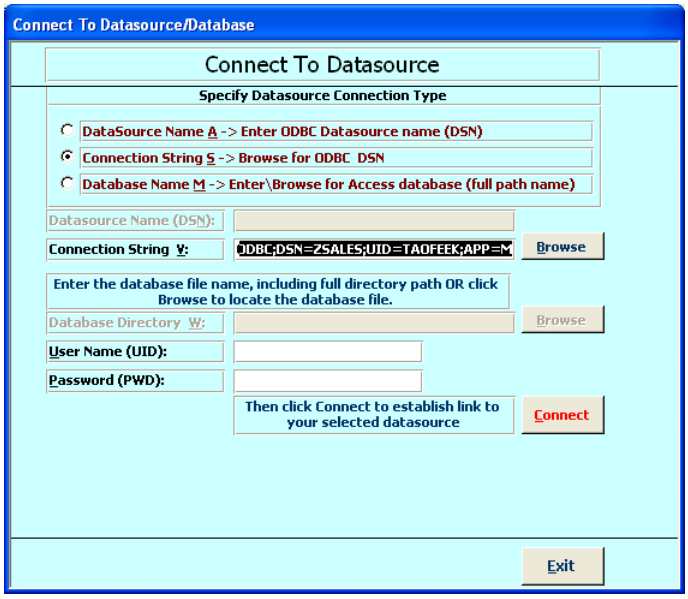
## 4.1 Connect To Data Source

Provides means to connect/re-connect to Sales Manager SQL-Server database if

- the database has moved to another directory on your workstation or
- the database has been moved to different computer on the network or
- the ODBC Datasource Name of the data has changed or database has been modified.

This is another means of establishing connection to the data source from within Sales Manager program. It is however advised to perform this operation from the Sales Manager Launcher.

1. Click **Connect to Data** on the File menu.
2. On the interface displayed below, click the radio button labelled "**Connection String**"
3. Click Browse to display the ODBC Database Administrator
4. Select the datasource name from Machine Data Source tab




(Note: The database is as an ODBC data source name (typically ZSALES).)

5. Click **Connect** to establish connection with the source of data. You will be prompted appropriately on completion.

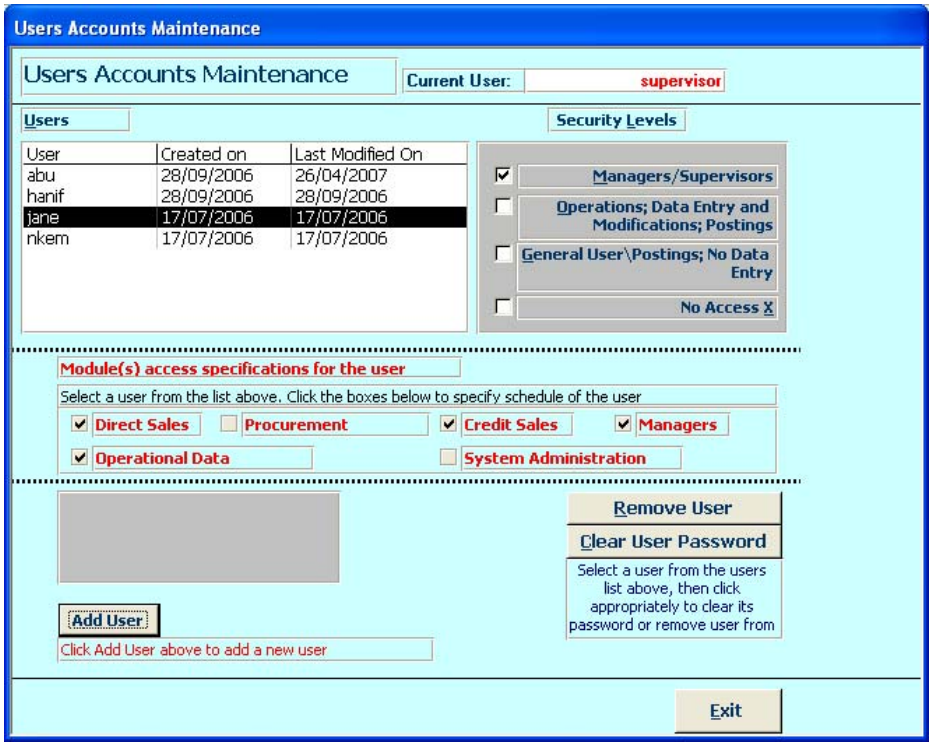
Note that this is an alternative method to connecting to data complementing the approach used in the "**Sales Manager Installation Guide**" guide.

**You have now established connection with the database. This procedure must be repeated on every workstation on the network where Sales Manager will be run, since they will share the same database. Furthermore, all users have access to this function.**

## 4.2 Security and Confidentiality – Creating Users and Assigning Roles

In this section we will learn how to create new users of Sales Manager and assign Security Levels and Module Access levels to them. **You must have Managers/Supervisors security level to perform these operations; the default user, "mainuser", has this privilege.**

1. Double-click on **Sales Manager** icon on the desktop.
2. On the resulting interface click **Launch Sales Manager** Login with your user name and password (if any).
3. Select **File** menu.
4. Select **Create Users and Assign Privileges**. This displays the interface below.




4.2.1 To create a new user

1. Click **Add User**
2. Enter the name of the user in the text box labelled User Name
3. Click **Save User** to create the user and add to users list
4. Click **Finish** to complete the process an enable other utilities.

4.2.2 To remove a user

5. Select the user from the list and click **Remove User**

4.2.3 To clear a user's password

6. Select the user from the list and click **Clear User Password**

(Note: Remove User & Clear User Password will be inactive if creation of a user is still in progress)

4.2.4 To specify the security level to be assigned to a user

The security level assigned to a user defines if the user can add new information, modify existing information, delete information and have access to system administration functions. Once you create a user you should assign the user a security level to allow access. The security levels available are enumerated in the table below.

| **Module** | **Privilege/Role Description** |
|---|---|
| **Managers/Sys Admin** | • Addition, modification and deletion of data<br>• System Administration functions |
| **Operations** | • Addition and modification of data, excluding the System Administration. |
| **General Users** | View data only, excluding the System Administration |
| **No Access** | Access denied |

From the User Accounts interface above,

1. Select a user from the list and
2. Click the desired security level

4.2.5 To specify module access levels of a user

The Module Access assigned to a user also depends on the roles or work scheduled for the user. Once you create a user you should then assign the modules that the user can access.

From the User Accounts interface above,

1. Select a user from the list and
2. Under the group Module Access to Selected User
3. Click to mark all the modules that the user can access

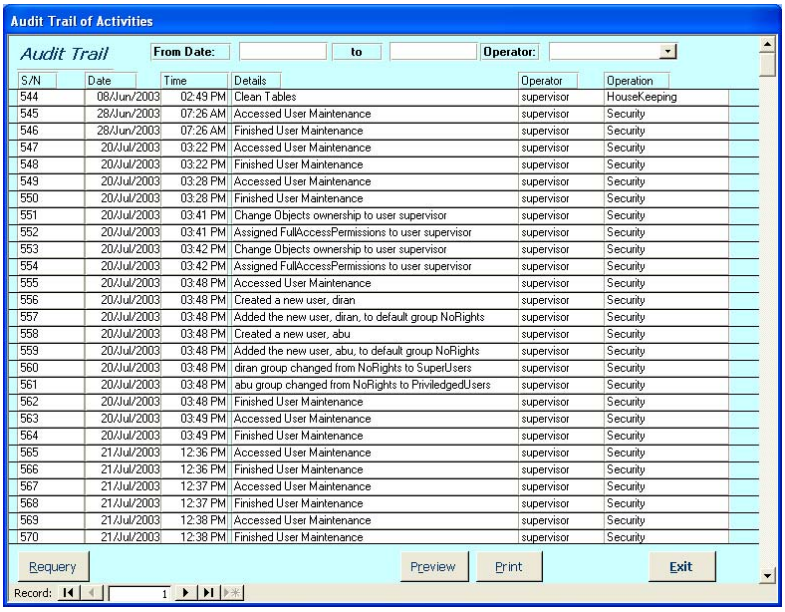
Possible Module Access levels are listed below.

| **Direct Sales** |
|---|
| **Procurement** |
| **Credit Sales** |
| **Managers** |
| **Operational Data** |
| **System Administration** |

## 4.3 Audit Trail

The Audit Trail is a log of information on key activities, providing an effective tool to monitor activities on Sales Manager. It captures the activities of each operator and each record is stamped with a date and time the activity took place.

1. Click **Audit Trail** on the File->System Administration menu t displays the interface below.
2. To view the audit trail for a particular operator select the operator from **Operator** combo box.
3. To view the audit trail for a particular duration, enter the date range in From Date and TO text boxes. If an operator is already selected, the audit trail of activities done by the operator for the date range specified will be displayed.
4. To view the audit trail for all activities to date, click "**Requery**".
5. Close the interface on completing your activities.




4.3.1 To print the audit trail

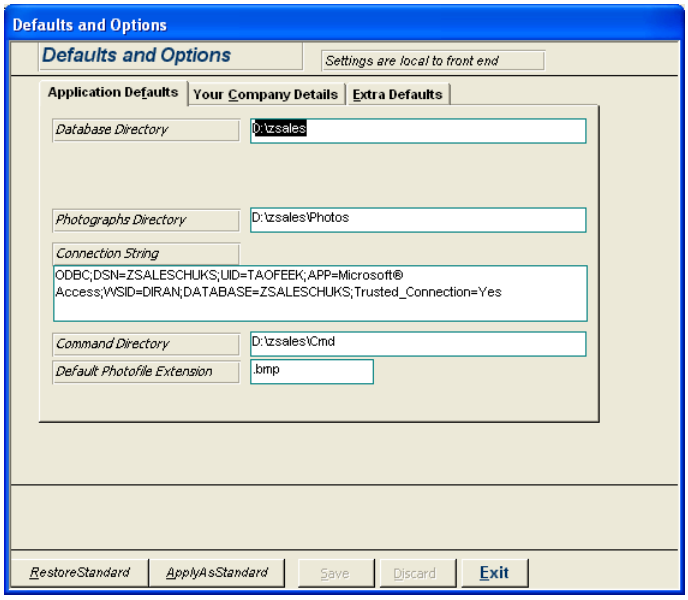
1. Enter the appropriate dates range.
2. Select an operator from the operator's combo box, if desired.
3. Click **Preview**. A preview of the audit trail will be displayed on the screen in report form
4. Click **Print**. The audit trail for the specification will be printed.

4.3.2 To prune the audit trail

5. Enter the appropriate dates range.
6. Select an operator from the operator's combo box, if desired.
7. Click Prune Audit Trail. This will delete the log for the specified date range and/or operator

## 4.4 Default Settings

- Default settings are information about the location of program files and connection information.
- Each workstation on the network can have its own settings, by modifying the parameters accordingly.
- The standard settings are global to all workstation, so clicking **Apply As Standard** will make the settings on your workstation the standard setting.
- Click **Restore Standard** restore standard settings to overwrite you local workstation settings.
- The company details tab is simply information on location of the company.




It is important to note that the **connection string** and **database name** must be the same for all workstations connected to the same database on the server. This ensures all users are sharing the same data for consistency of information processing.

### 4.5 Backup, Restore and Shrink data

Backup, Restore and Shrink operations are performed via the SQL-Server Management Studio. It is recommended that you backup Sales Manager database regularly. If Sales Manager is used on a daily basis, daily backups are strongly recommended. Shrink operations are performed automatically since the database has been set up for AUTOSHRINK.

If you are using the full version of SQL-Server, backups can be scheduled to perform periodically. With SQL-Server Express 2005, you must backup via the management studio.

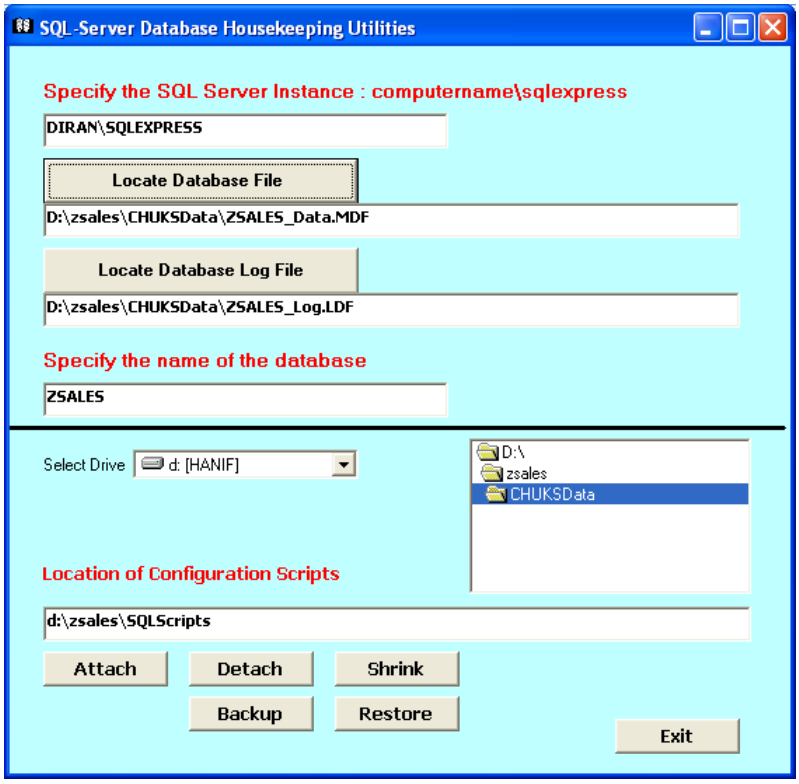
If the SQL-Server Management Studio is not available, you can use the Housekeeping module bundled with Sales Manager. The interface is displayed with below. You must modify the scripts used by this utility to reflect the database name, database files (.mdf and .ldf files) and the directory location of the files. The following scripts must be modified accordingly.

- AttachVT.sql
- ShrinkV.sql
- BackupV.sql
- DetachV.sql
- RestoreV.sql

These script files are pre-installed when you install the housekeeping module, typically on the server computer.

1. Select **Housekeeping** from Sales Manager group on the **Programs** menu or Double-click on Housekeeping on the desktop. This displays the interface below.
2. Enter the SQL- Server Instance name in form of *computername|sqlexpress*.
3. Enter the database file name (.mdf file) with full path definition (or click Locate Database file and browse the disk and select the appropriate file.
4. Enter the database log file name (.ldf file) with full path definition (or click Locate Database Log file and browse the disk and select the appropriate file.
5. Enter the name of the database; e.g ZSALES.
6. Enter or browse for the directory location of the configuration script files.

7. Click the button indicating the facility you want to perform.
   - **Attach**: To attach the database to a server
   - **Detach**: to detach the database from the server
   - **Shrink**: to remove empty file pages from the database
   - **Backup**: to backup the database
   - **Restore**: to restore database from backup
8. Click Exit when you have finished.



# 5 Sales Manager Operational Data

The table below lists the operational data that need to be defined to configure Sales Manager for your site.

| Operational Data | Usage\Purpose |
|---|---|
| Set Transaction Date | |
| Specify Expense Folio | |
| Charge Account Codes | |
| Expense Codes | |
| Operational Defaults | |
| Units Bases | |
| Units Categories | |
| Units of Storage of Drugs | |
| General Operational Data | |

## 5.1 Defining operational data

**Only users with operational data module access privileges have access to these functions. Operational data information is strategic to proper operation of Sales Manager and as such access to its functions must be controlled.**

In each case, select the required menu and **Add** or **Modify** information as required.

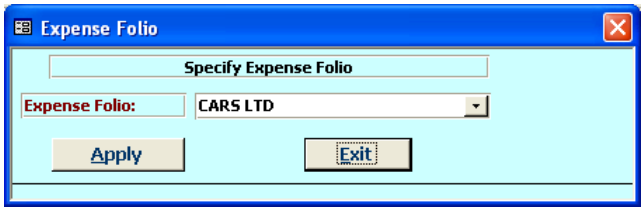
1. Click the button required or select the menu required
2. To enter new record
    a. Click **Add**
    b. Click **Save** to save the record.
3. To modify existing record.
    a. Navigate to the record of interest
    b. Click **Modify**.
    c. Change the information.
    d. Click **Save**

### 5.1.1 Set Transaction Date

This specified the date of transaction. The user must ensure that the date of transaction is correct since Sales Manager does not rely on the system date to stamp transaction operations. A user without knowledge of the impact date and time on the operations of Sales Manager could change the system date and time.

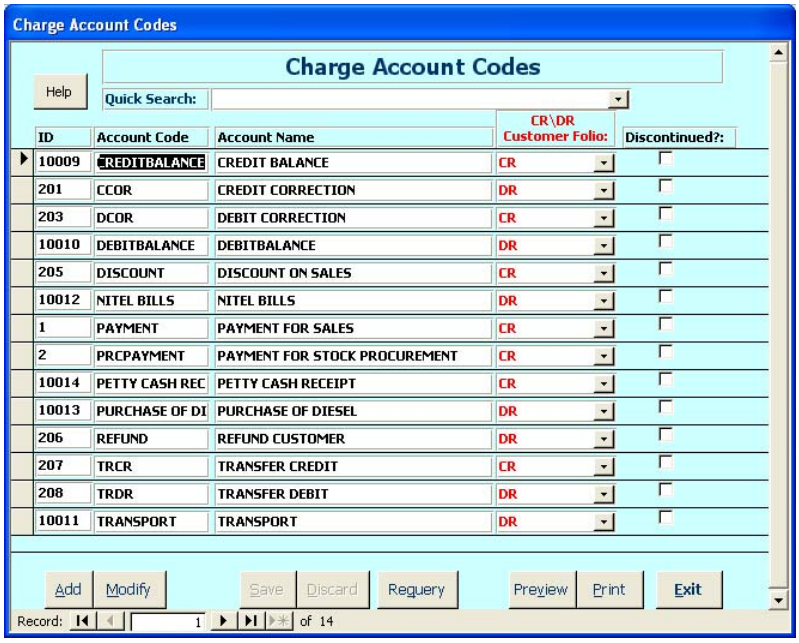
### 5.1.2 Specify Expense Folio

The Expense Folio defines the folio where expenses incurred by the company are recorded. The folio is typically the name of your company, although you can specify a specific customer created for expense monitoring.



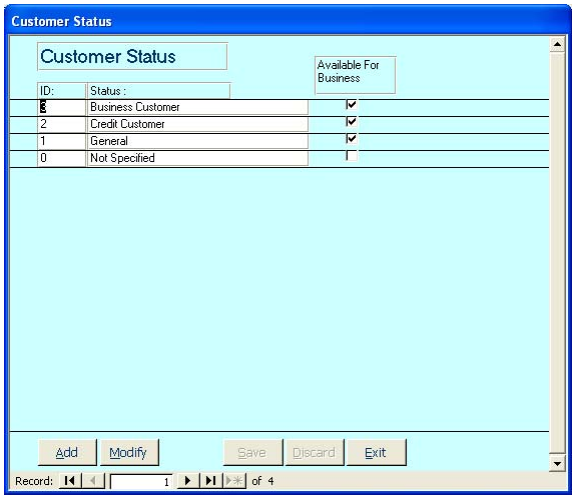

### 5.1.3 Define Charge Account Codes

Charge Account Codes defines services and charges that are debited\credited to customers\suppliers.



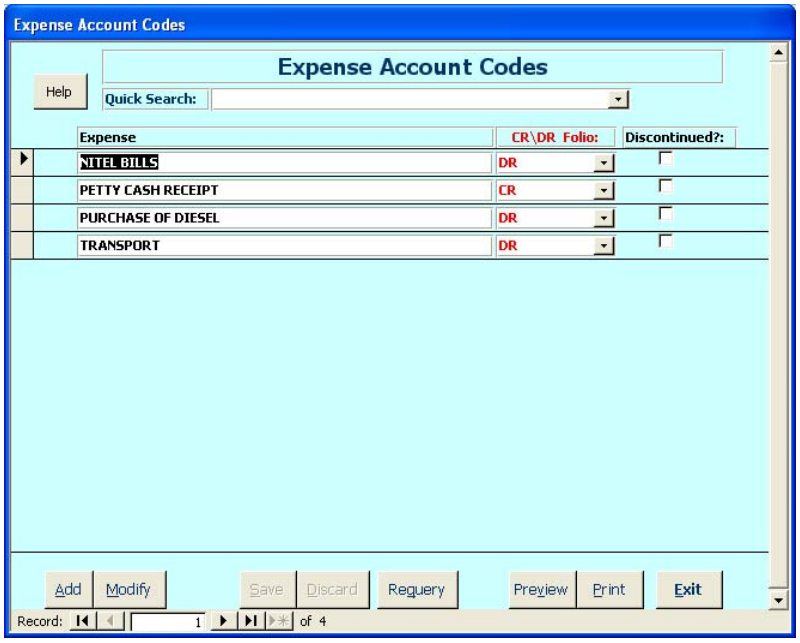

### 5.1.4 Define Customer Status

Defines all the possible status of a customer\supplier.

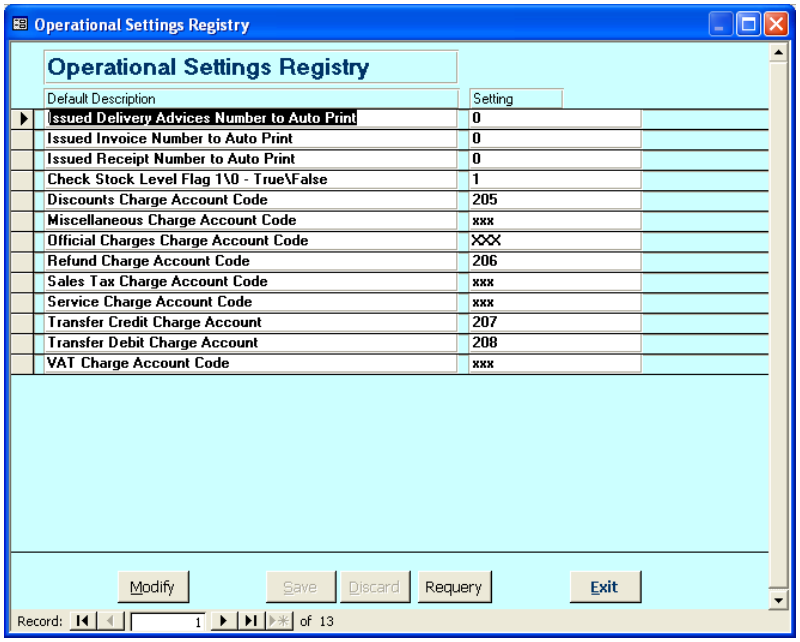


### 5.1.5 Define Expense Codes

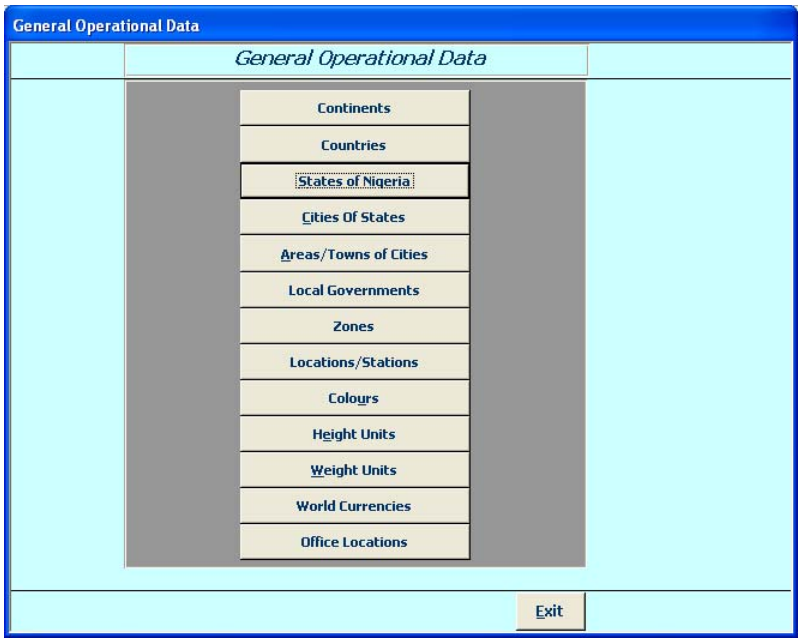
Defines the expense codes used by your company.




### 5.1.6 Operational Defaults




### 5.1.7 General Operational Data

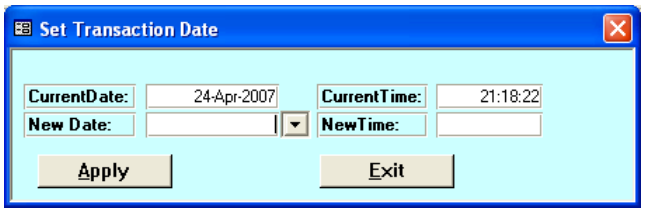

General Operational Data
General Operational Data
Continents
Countries
States of Nigeria
Cities Of States
Areas/Towns of Cities
Local Governments
Zones
Locations/Stations
Colours
Height Units
Weight Units
World Currencies
Office Locations
Exit

# 6 Closing Postings For the Day

It is important to note that key operations of Sales Manager is to manage and monitor financial transactions relating to sales, invoicing and expenses transactions. These transactions must be stamped with the date that transactions where carried out.

In Sales Manager does not depend on the computer date since the computer date can be inadvertently changes by a user or, in extreme cases, the computer bios may be faulty. This will affect the integrity of the date stamped.

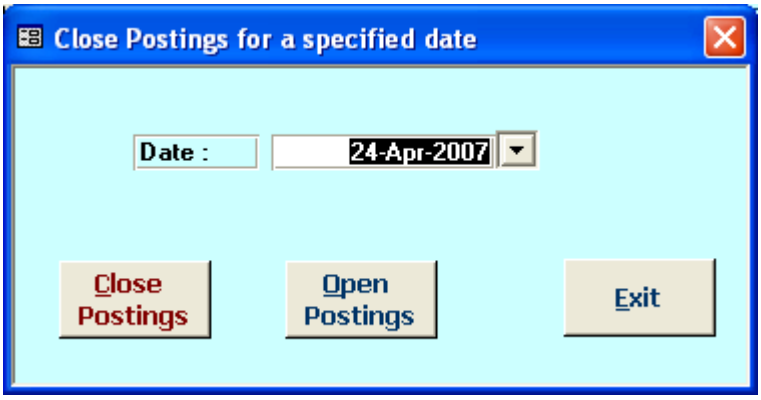
Sales Manage has the facility to set the transaction date globally via **Set Date** button on the main interface or **Set Transaction Date** on the Operational Data menu.




On completion of transactions for a particular day we must ensure that the date for the next day is set correctly and also that we do not post transactions into a different date. We implement this with the facility to automatically close the postings for the current date and automatically set the date to the next day.

To do this operations:

1. Click **Close Day Postings** on the main interface.
2. Click **Close Postings** on the resulting interface and respond accordingly to the messages.
3. On completion click Exit.
4. You will notice that the date on the main interface would have been changed to the next day. If you try to post to the previous day you will be prevented to do so and be prompted accordingly.
5. **THIS PROCEDURE MUST BE PERFORMED AT THE END OF EACH DAY'S TRANSACTIONS.**



# 7 Customers and Suppliers Information Management

In this section we will learn how to

1. Create Customers information
2. Create Suppliers information
3. Reports on Customers and Suppliers.

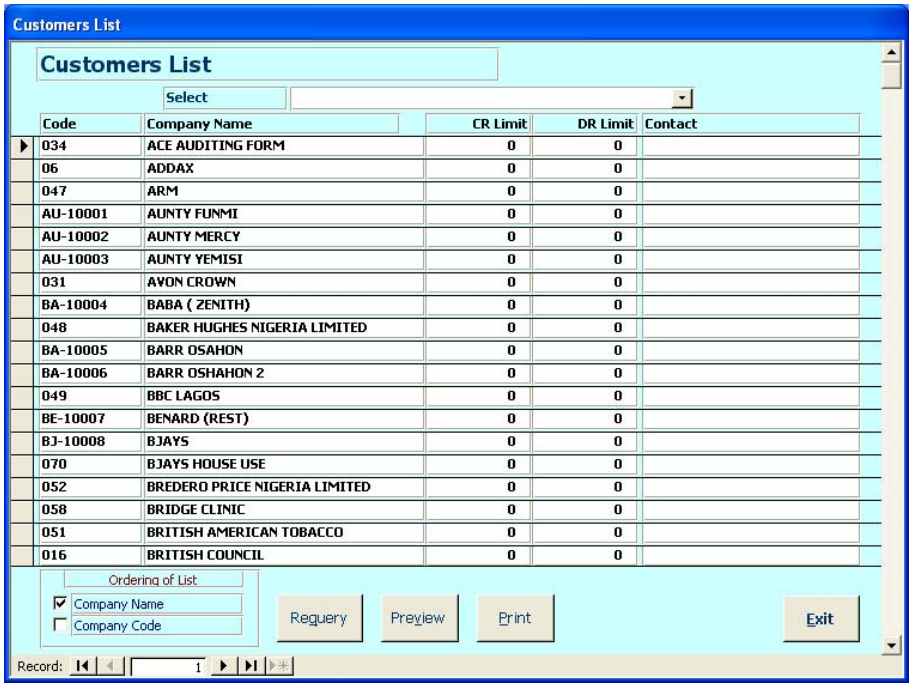
The menu used for these operations are labeled Customers and Suppliers with the following menu items

- Customers List
- Customers Information (Data Entry and Modifications)
- Suppliers List
- Suppliers Information (Data Entry and Modifications)

## 7.1 Customers Information

### 7.1.1 To display the list of Customers

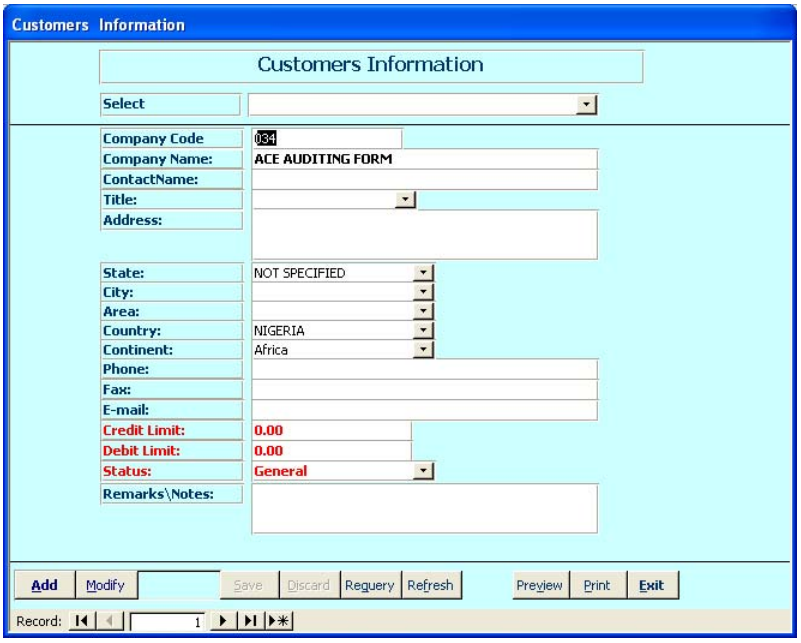
1. Click **List** button on the main interface beside the Customers button or select **Customers List** from the Customers and Suppliers menu. This will display the interface below, listing all the customers in your database.
2. Navigate to the record of interest and double click on the left hand edge of the record to display customer's details or account statement detailing transactions and balance of the customer.




### 7.1.2 To register a new customer

1. Click **Customers** on the main interface or select **Customers Information (Data Entry and Modifications)** from the Customers and Suppliers menu.
2. This will display the interface below

3. Click **Add** at the bottom left hand corner of the interface to clear the text boxes ready for data of a new customer.

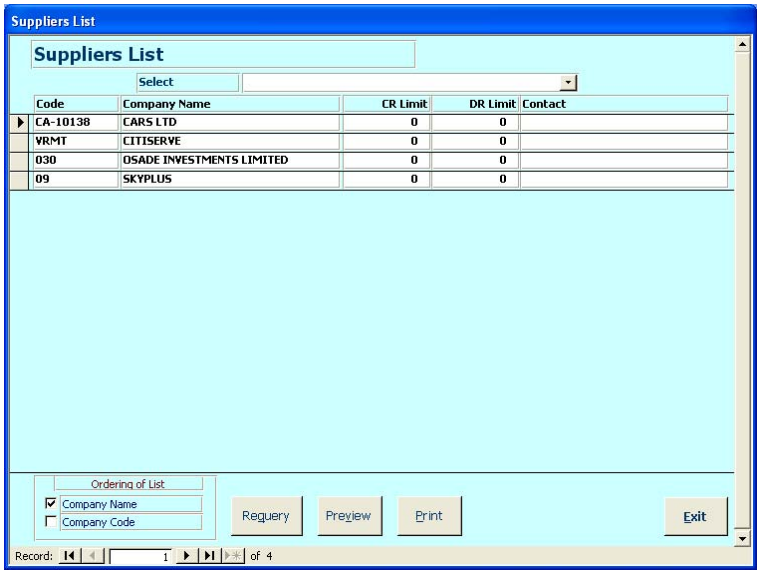



4. Enter the details of the customer in the appropriate text boxes.
5. Click **Save** when you finish. The changes will replace existing information on the customer.
6. To modify existing customer's details, navigate to the customer or locate the customer by selecting the customer from the combo box **Select** at the top of the interface.
7. Click **Modify**; then make changes to the details in the required text boxes.
8. Click **Save**.

## 7.2 Suppliers Information

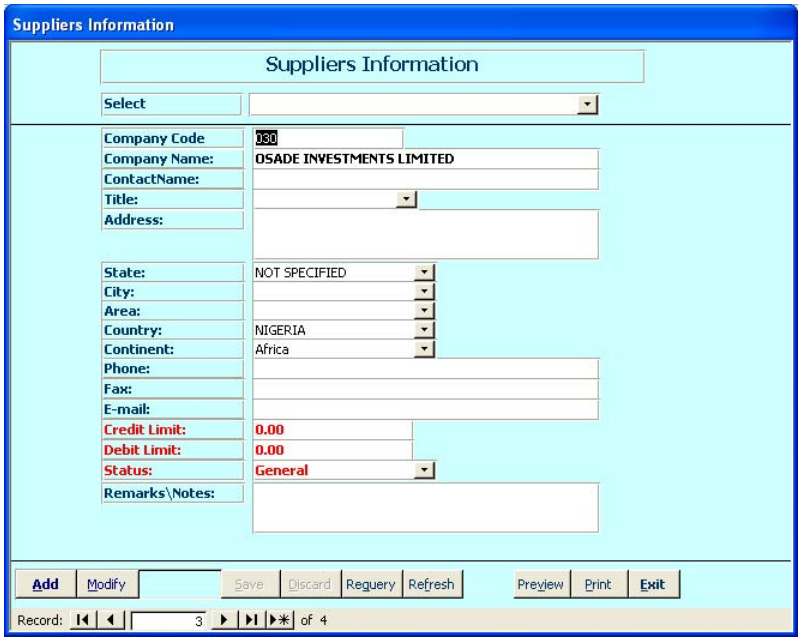
### 7.2.1 To display the list of Suppliers

1. Click **List** button on the main interface beside the Supplier button or select **Suppliers List** from the Customers and Suppliers menu. This will display the interface below, listing all the suppliers in your database.
2. Navigate to the record of interest and double click on the left hand edge of the record to display supplier's details or account statement detailing transactions and balance of the supplier.




7.2.2 To register a new supplier

1. Click **Suppliers** on the main interface or select **Suppliers Information (Data Entry and Modifications)** from the Customers and Suppliers menu.
2. This will display the interface below
3. Click **Add** at the bottom left hand corner of the interface to clear the text boxes ready for data of a new supplier.




4. Enter the details of the supplier in the appropriate text boxes.
5. Click **Save** when you finish. The changes will replace existing information on the supplier.
6. To modify existing supplier's details, navigate to the supplier or locate the supplier by selecting the customer from the combo box **Select** at the top of the interface.
7. Click **Modify**; then make changes to the details in the required text boxes.
8. Click **Save**.

# 8 Products Information Management

In this section we will learn how to

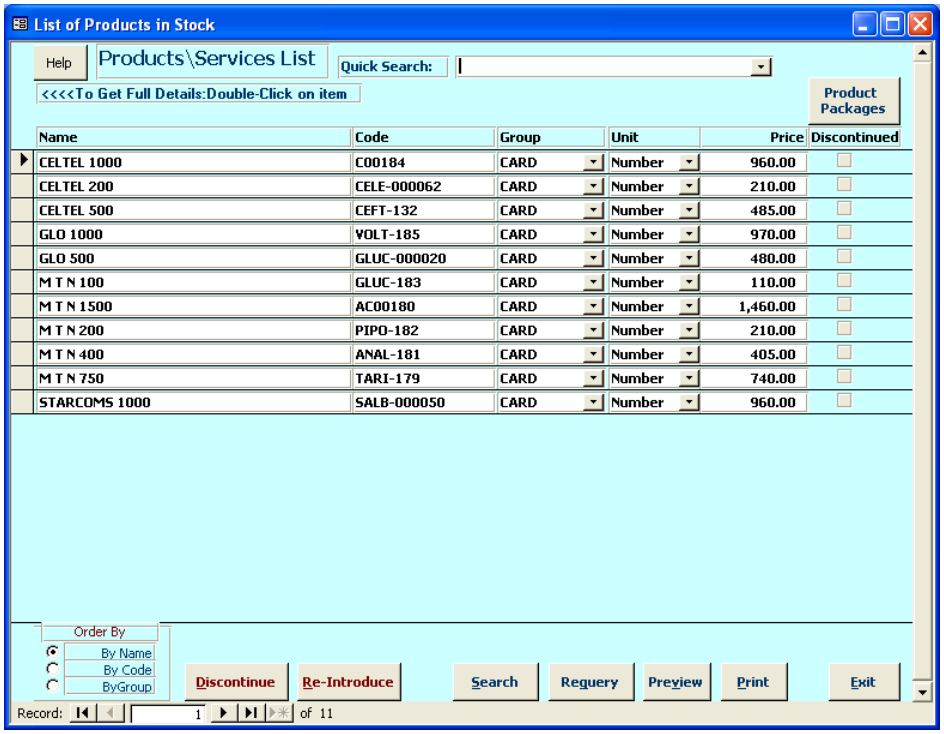
1. Create products information
2. Create products packages
3. Register stock with serial numbers
4. Generate Pro-forma invoices
5. Monitor products movements and generate bin cards

The menu used for these operations are labeled Products Information with the following menu items

Products Groupings
Products List
Products Full Details (Data Entry and Modifications)
Products Search
Products Packages Names
Products Packages Details
Product\Stock Registration
Product\Stock Movements and Bin Cards
Pro-forma Invoices

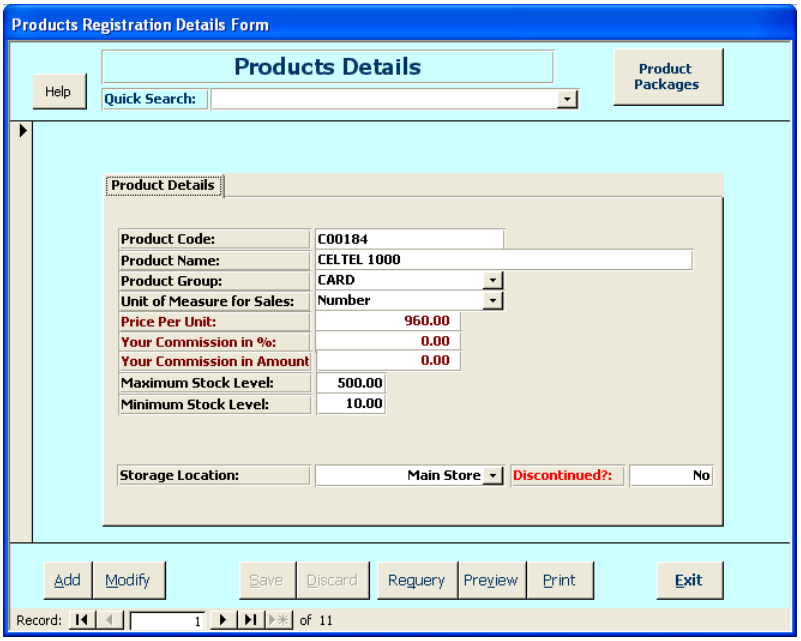
## 8.1 To display the list of products

1. Click **List** button on the main interface beside the Supplier button or select **Products List** from the Products Information menu. This will display the interface below, show your products in a list.
2. Navigate to the record of interest and double click on the left hand edge of the record to display products's details.



## 8.2 To register a new product

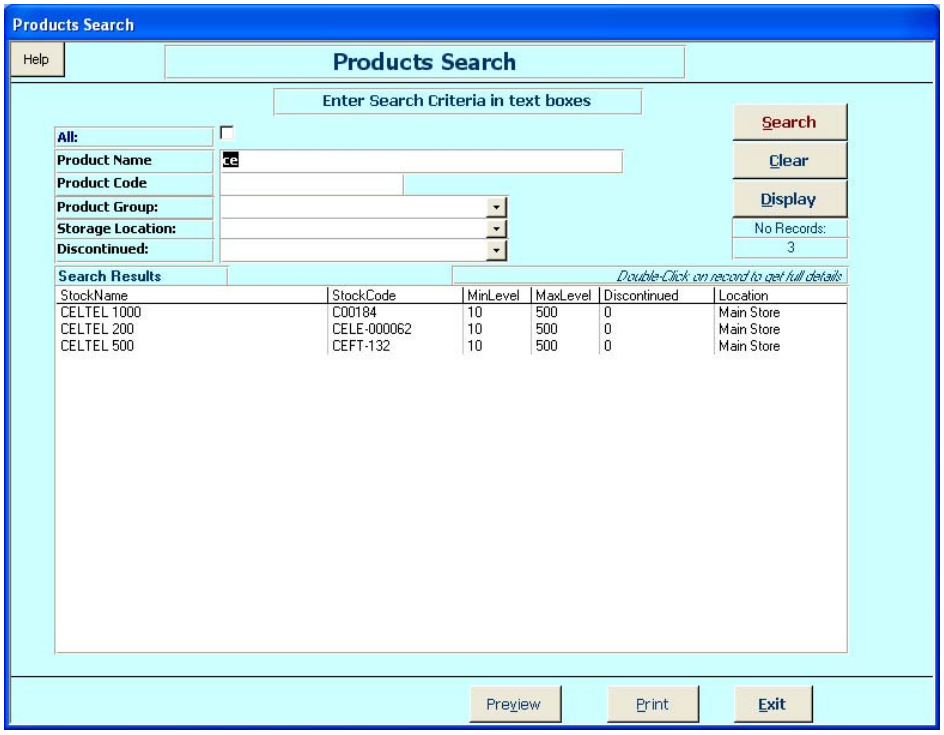
1. Click **Products** on the main interface or select **Products Full Details (Data Entry and Modifications)** from Products Information menu.
2. This will display the interface below
3. Click **Add** at the bottom left hand corner of the interface to clear the text boxes ready for data of a new product.




4. Enter the details of the product in the appropriate text boxes.
5. Click **Save** when you finish. The changes will replace existing information on the product.
6. To modify existing product's details, navigate to the product or locate the product by selecting the customer from the combo box **Quick Search** at the top of the interface.
7. Click **Modify**; then make changes to the details in the required text boxes.
8. Click **Save**.

## 8.3 Searching for Products

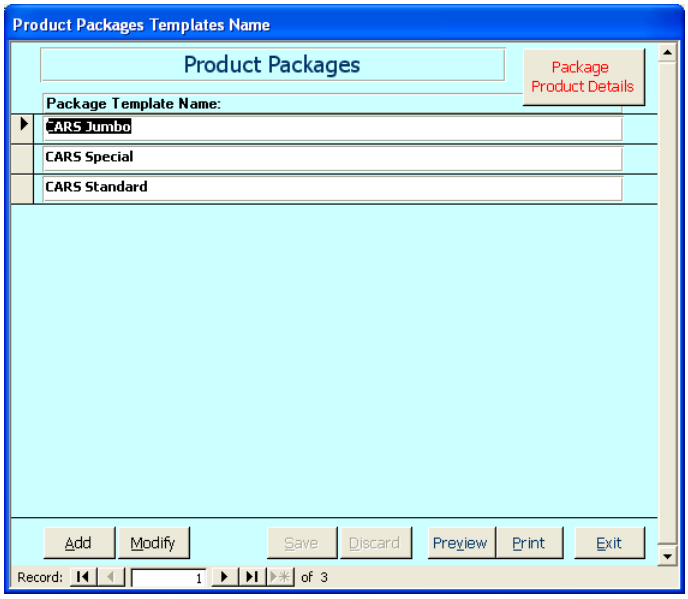
1. Select **Products Search** from the Products Information menu.
2. Enter the criteria for search in any of the text boxes.
3. Click **Search**. If results matching the criteria are found the list of products will be displayed.
4. Double-Click on a record on the results list to display the full details of the product.
5. Click **Preview** (or **Print**) to preview corresponding reports on the screen (or directly to the printer). When in Preview mode send the report to the printer via File->Print menu.




## 8.4 Creating Product Packages

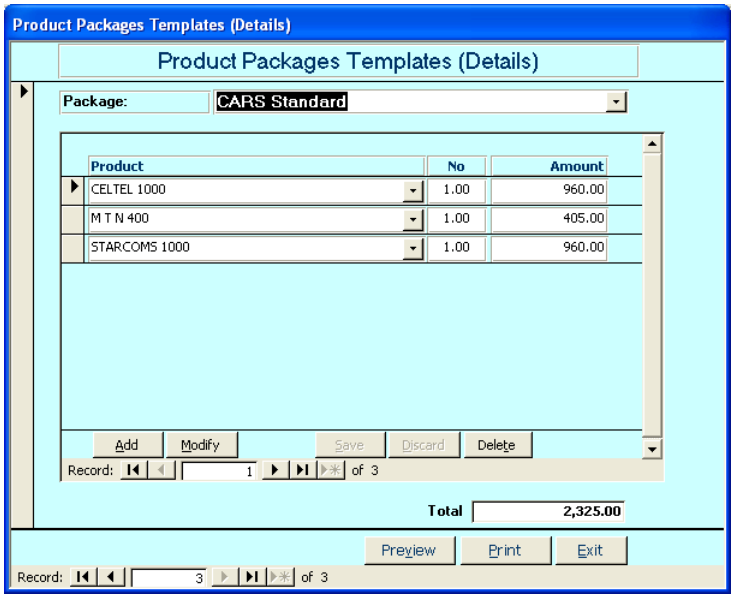
Products Packages in this context are groups of individual products that form a package. You define the names of your packages as follows.

1. Select **Products Packages Names** from Products information menu. This displays the interface below.
2. Click **Add**; Enter the name of the package, then click **Save**.
3. To modify an existing package name; Click **Modify**, change the name, click **Save**.
4. To print or preview the package names\details, click **Print** or **Preview**.



Details of each product package are entered as follows.

1. Select **Products Packages Details** from Products information menu. This displays the interface below.
2. Select the package via combo box labelled **Package**. If products have been attached to the package the list of products will be displayed in the inset.
3. To add products on the package.
    a. Click **Add**;
    b. Select the **Product**;
    c. Enter the Quantity;
    d. Enter the Amount if different from the derived amount,
    e. Click **Save**.
    f. Repeat from a) to add another product
4. To modify existing package details;
    g. Select the package;
    h. Click **Modify**
    i. On the list of products, change the Product, Quantity and Amount as required,
    j. Click **Save**.
5. To print or preview the package names\details, click **Print** or **Preview**.

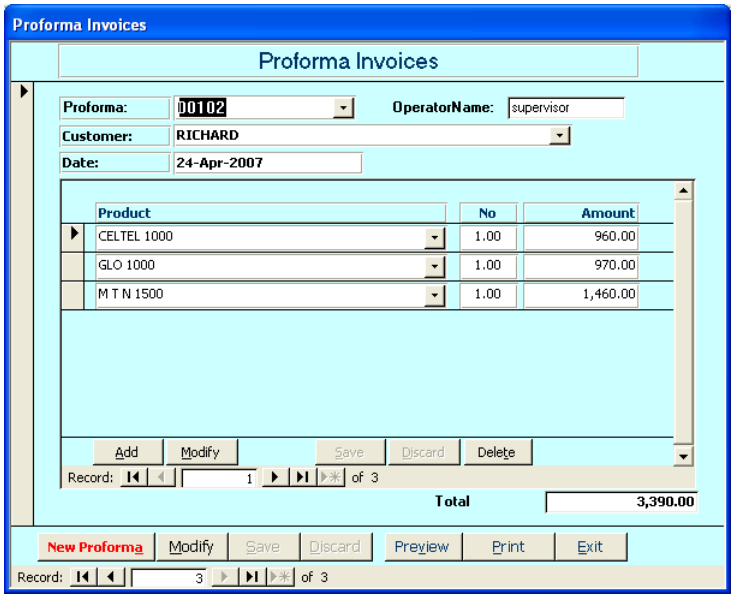



## 8.5 Creating Pro-forma Invoices

Pro-Forma Invoice creation is similar to creating product packages, the difference being addition of the customer and the date issued.

1. Select **Pro-Forma Invoice** from Products information menu. This displays the interface below.
2. Click **New Proforma**
3. Select the **Customer**.
4. Enter the **Date**, if different from the current date
5. Click **Save**.
6. To add the products to the proforma invoice.
    a. Click **Add**;
    b. Select the **Product**;
    c. Enter the Quantity;
    d. Enter the Amount if different from the derived amount,
    e. Click **Save**.
    f. Repeat from a) to add another product

7. To modify existing pro-forma;
    a. Select the Pro-forma invoice number;
    b. Click **Modify**
    c. On the list of products, change the Product, Quantity and Amount as required,
    d. Click **Save**.
    e. Repeat from a) to modify another on the list
8. To print or preview the pro-forma details, click **Print** or **Preview**.



# 9 Accounts Charging

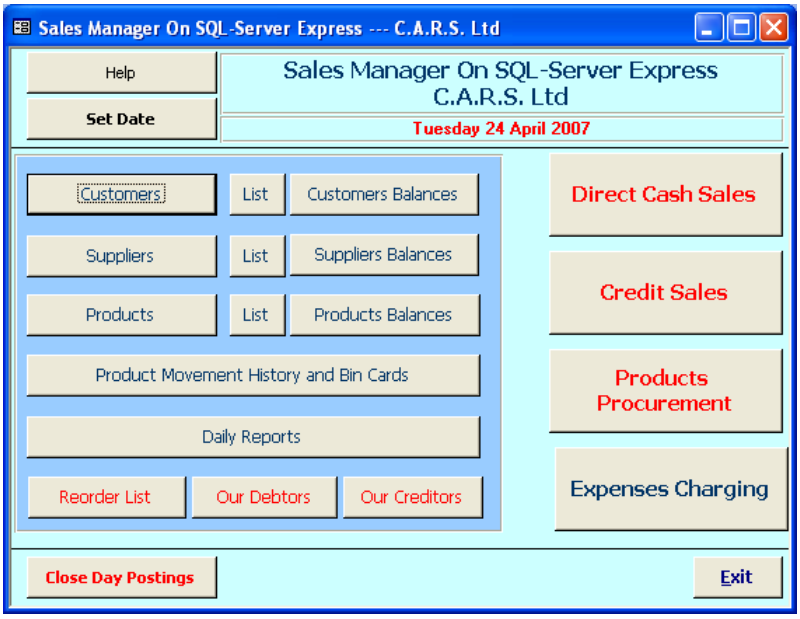
In this section we will learn how to use Sales Manager to perform the following operations

1. Direct Cash Sales.
2. Credit Sales.
3. Products (and Services) Procurement.
4. Expense Account Charging
5. Customers Balances
6. Suppliers Balances.

The menu used for these operations is **Financials** with the following menu items.

Direct Cash Sales
Credit Sales
Products Procurements
Expense Account Charging
Products Balance
Customers Balance
Suppliers Balance

Clicking the appropriately labelled buttons on the main interface shown below can also initiate these operations



## 9.1 Direct Cash Sales

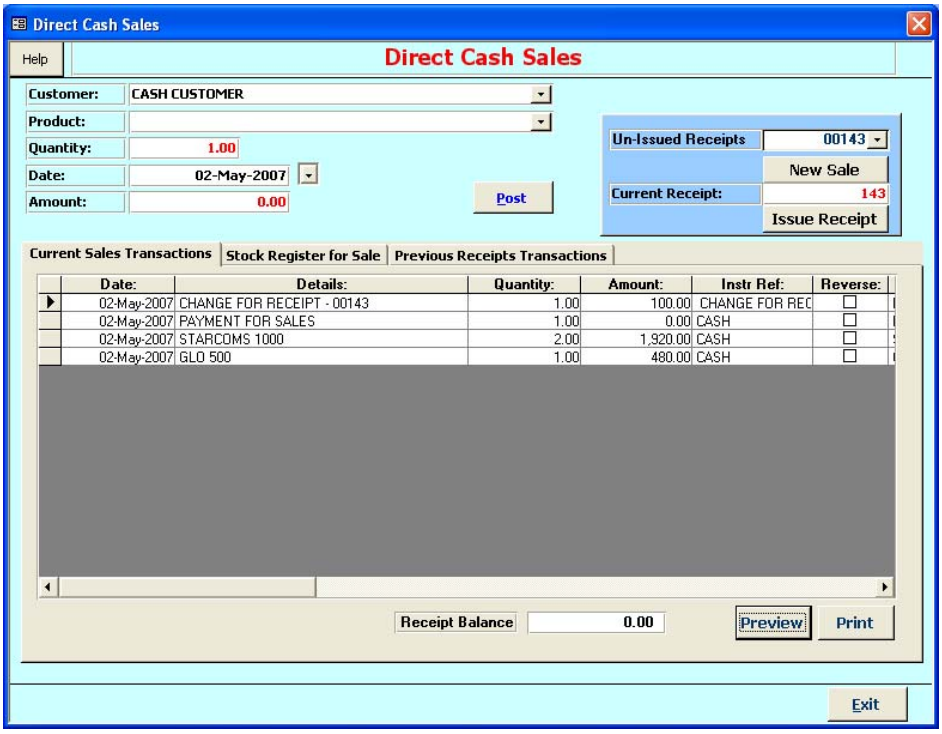
Direct Cash Sales operations are those where products are paid for as they are sold, for example, at the till in a supermarket.

1. Click **Direct Cash Sales** on the main interface.
2. Select the **Product**
3. Enter the **Quantity**
4. Enter the **Date**
5. Enter\Modify the **Amount**, if required**.**
6. Click **Post**. You will be prompted for a receipt number if a receipt has not been selected or generated for the sales transactions you want to perform.
   The prompt\message will ask if you want to auto-generate a receipt.
   a. Click **Yes** if a new receipt is required to be auto-generated.
   b. Click **No** if you need to select an existing **Un-Issued** receipt or to generate a new receipt by clicking **New Sales**.
   The sales transactions list will be updated with a new record and the receipt balance updated appropriately.
7. Repeat from 2) to add other products for this sale. Note that the receipt number generated is still in context and will be used for all the transactions.
   **If a posting is done in error, you can remove the transaction by double-clicking on the record.**
8. When all the products to be sold have been logged, you must collect payment and post the payment.
   a. Select **Payment For Sales** from **Product** combo box. The value of the items will be displayed in **Amount**.
   b. If the customer hands over an amount that is more than the one displayed, enter this amount in **Amount** (i.e. delete the amount displayed and enter the amount given by the customer).
   c. Click **Post**. The correct **change** to give the customer will be shown in the transaction list and the **Receipt Balance** will be 0 (i.e. receipt has balanced)
   d. Click **Issue Receipt**. The interface will be cleared and receipt printed automatically on the printer.

   **IMPORTANT points to note when operating Direct Cash Sales.**
   - **A receipt must balance (i.e. Receipt Balance equals 0) before it can be Issued.**
   - **The amount paid by the customer cannot be less than the total cost of the items.**
   - **Only one payment can be associated with a receipt.**
9. Repeat from step 2) for another sale transaction.
10. You can print\preview the receipt transactions report by clicking Print or Preview.

### 9.1.1 Simple Procedure

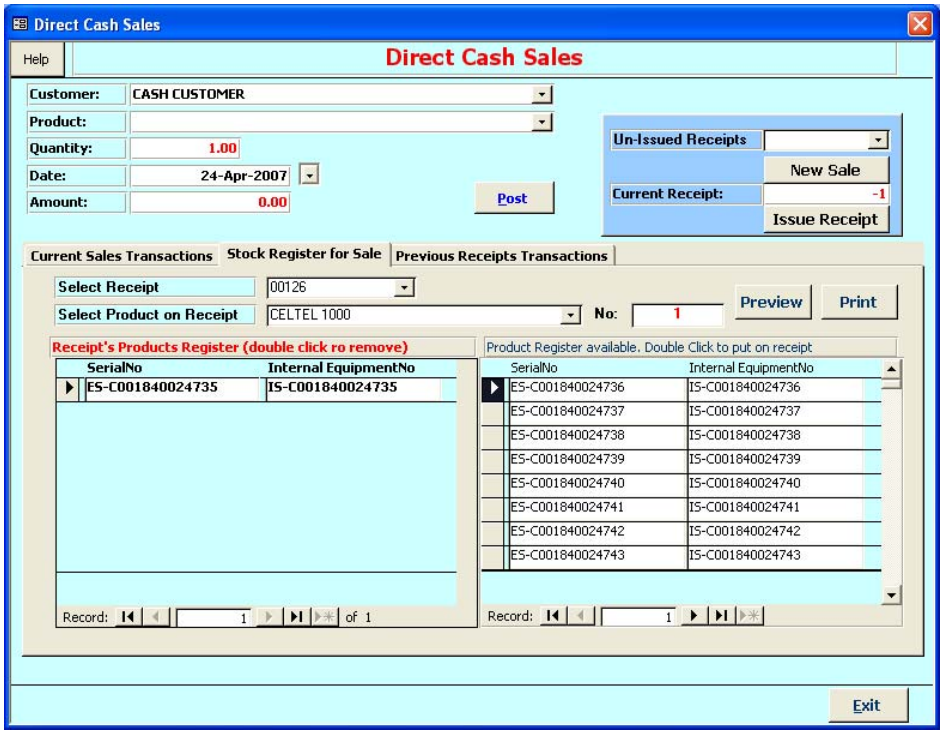
1. Click **Direct Cash Sales** on the main interface.
2. Select the **Product**
3. Enter the **Quantity**
4. Enter the **Date** (if different).
5. Enter\Modify the **Amount**, if required**.**
6. Click **Post**. The prompt\message will ask if you want to auto-generate a receipt; Click Yes.
7. Repeat from 2) to add other products\items for this sale.
   If a posting is done in error, remove the transaction by double-clicking on the record.
8. Select **Payment For Sales** from **Product** combo box.
9. Enter the amount paid by the customer in **Amount** (if different from the one displayed).
10. Click **Post**. The correct **change** to give the customer will be shown in the transaction list and the **Receipt Balance** will be 0 (i.e. the receipt has balanced).
11. Click **Issue Receipt**. The interface will be cleared and receipt printed automatically on the printer.
12. Repeat from step 2) for another sale transaction.




### 9.1.2 Register Stock Sold

Each receipt contains a log of products sold. In cases where it is required to register the serial number(s) of all or some of the products, Sales Manager provides the facility via the **Stock Registration for Sale** tab.

1. Click the **Stock Registration for Sale** tab. Two (2) insets will be visible; the left hand inset is for the register of products on the receipt, **Receipt's Products Register**, while the right hand inset is for the products in store, **Products Register Available**.
2. **Select the Receipt** of interest.
3. Select the **Product on Receipt**. The number of the products on the receipt will be displayed.
4. Double-click on a product register right hand inset, **Products Register Available**, to transfer to the receipt. Repeat this step for the number\quantity of the product.
5. Repeat from step 3) for all products on the receipt.
6. Repeat from step 2) for another receipt



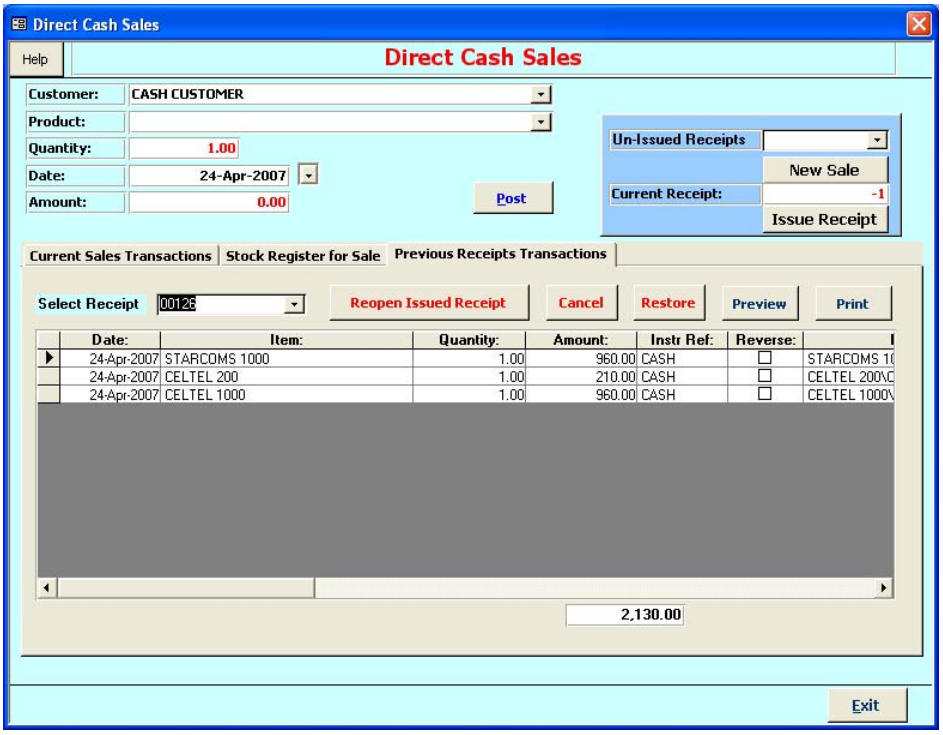

### 9.1.3 Review Existing Receipts Transactions

There are situations where you may want perform the following:

a. **Review** and print a previous receipt's transactions,
b. **Cancel** a receipt or
c. **Re-open** to enter sales if the receipt was issued before completing all the transactions for the sale.

You can do any of these operations on the **Previous Receipts Transactions** tab.

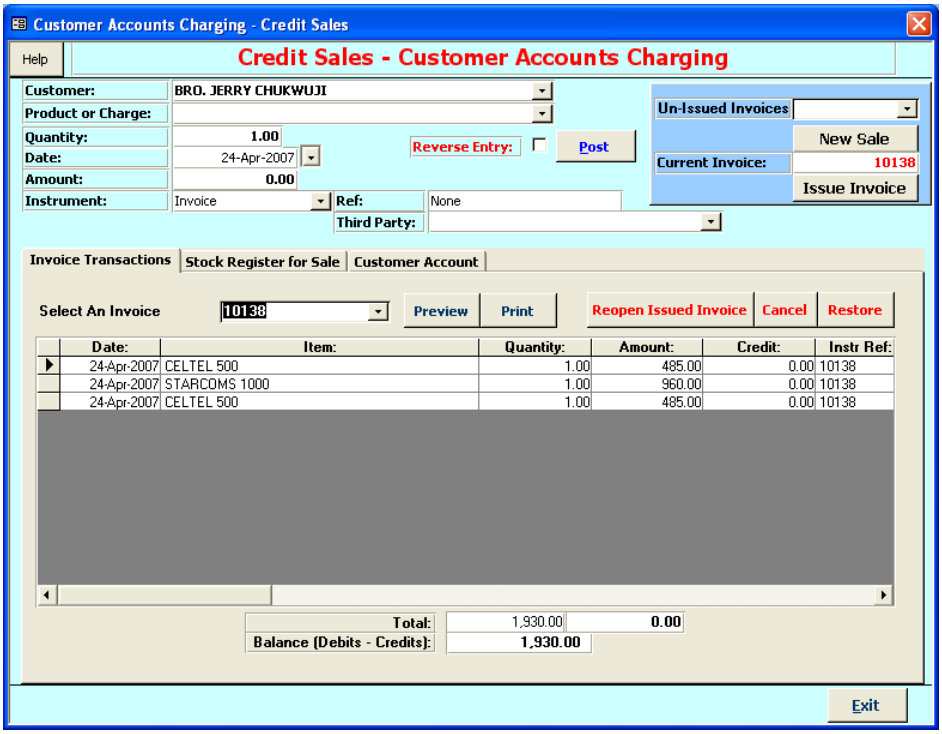
a. Click **Previous Receipts Transactions** tab
b. Select a Receipt.
c. To re-open a receipt to allow adding extra sales transactions or removing a transaction, Click **Re-Open Issued Receipt**.
d. To cancel a receipt, click **Cancel**.
e. To restore a cancelled receipt such that it can be reused, Click **Restore**.
f. To print or preview the receipt, click **Print** or **Preview**.


Direct Cash Sales
Help
Direct Cash Sales
Customer:
CASH CUSTOMER
Product:
Quantity:
1.00
Date:
24-Apr-2007
Amount:
0.00
Post
Un-Issued Receipts
New Sale
Current Receipt:
-1
Issue Receipt
Current Sales Transactions
Stock Register for Sale
Previous Receipts Transactions
Select Receipt
00126
Reopen Issued Receipt
Cancel
Restore
Preview
Print
Date:
Item:
Quantity:
Amount:
Instr Ref:
Reverse:
24-Apr-2007 STARCOMS 1000 1.00 960.00 CASH
24-Apr-2007 CELTEL 200 1.00 210.00 CASH
24-Apr-2007 CELTEL 1000 1.00 960.00 CASH
2,130.00
Exit

## 9.2 Credit Sales

Credit Sales handles sales to customers on credit; customers' accounts are debited with the sale and payments can be charged at later date. Each customer has a folio or account statement monitoring the sales transactions and provides the current balance of the customer at any point in time.

1. Select **Credit Sales** from Financials menu or Click **Credit Sales** on the main interface.
2. Select the **Customer**.
3. Select the **Product.**
   - If payment is to be made, select **Payment For Sales** in Products.
4. Enter the **Quantity**. If payment is to be made Quantity text box will be disabled.
5. Enter the **Date.**
6. Enter\Modify the **Amount**, if required**.**
7. Select the **Instrument** and enter the Instrument **Ref** No; for product sales Instrument will be Invoice by default.
8. if the sale is done on behalf of a third party, enter\select the beneficiary on **Third Party**.
   Note that if the name is not on the list the new name will be added to the list (you will be prompted appropriately)




9. Click **Post**. You will be prompted for an invoice number if an invoice has not been selected or generated for the sales transactions you want to perform.
   The prompt\message will ask if you want to auto-generate a receipt.
   a. Click **Yes** if a new invoice is required to be auto-generated.
   b. Click **No** if you need to select an existing **Un-Issued Invoice** or to generate a new invoice by clicking **New Sales**.
   The sales transactions list will be updated with a new record and the balance updated appropriately.
   *If the posting is a payment a receipt is automatically generated and printed for the transaction.*
10. Repeat from 2) to add other products for this sale. Note that the invoice number generated is still in context and will be used for all the transactions.
11. **If a posting is done in error, you must nullify the transaction as follows**
    - Enter the information again from Steps 2) to 8): **Amount must be the same**.

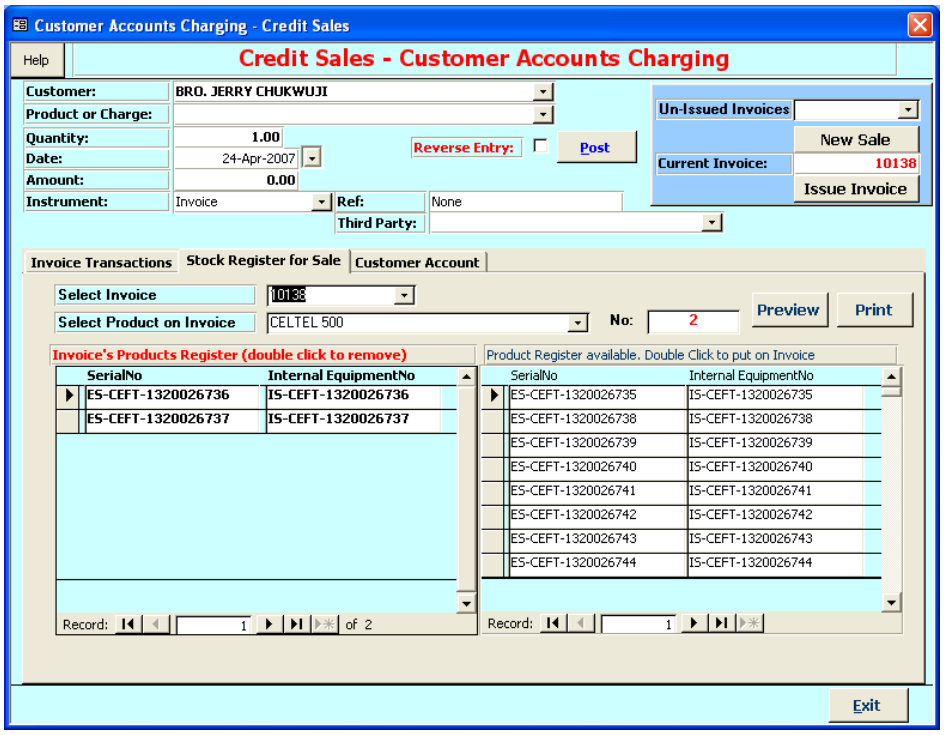
- Click the **Reverse Entry** check box
- Click **Post**. The transaction will be entered and will reverse the wrong posting

12. When all the products for the sale have been logged, click **Issue Invoice**. The interface will be cleared and invoice printed automatically on the printer.
13. Repeat from step 2) for another sale transaction.
14. You can print\preview the invoice transactions report by clicking Print or Preview.

### 9.2.1 Register Stock Sold

Each invoice contains a log of products sold. To register the serial number(s) of all or some of the products, click the **Stock Registration for Sale** tab, as in direct sales transactions..

1. Click the **Stock Registration for Sale** tab. Two (2) insets will be visible; the left hand inset is for the register of products on the invoice, **Invoice's Products Register**, while the right hand inset is for the products in store, **Products Register Available**.
2. **Select the Invoice** of interest.
3. Select the **Product on Invoice**. The number of the products on the receipt will be displayed.
4. Double-click on a product register right hand inset, **Products Register Available**, to transfer to the invoice. Repeat this step for the number\quantity of the product.
5. Repeat from step 3) for all products on the invoice.
6. Repeat from step 2) for another invoice.




### 9.2.2 Review Existing Invoice Transactions

As in direct sales you can perform the following with existing invoices.

a. **Review** and print a previous invoices' transactions,
b. **Cancel** an invoice or
c. **Re-open** to enter sales if the invoice was issued before completing all the transactions for the sale.

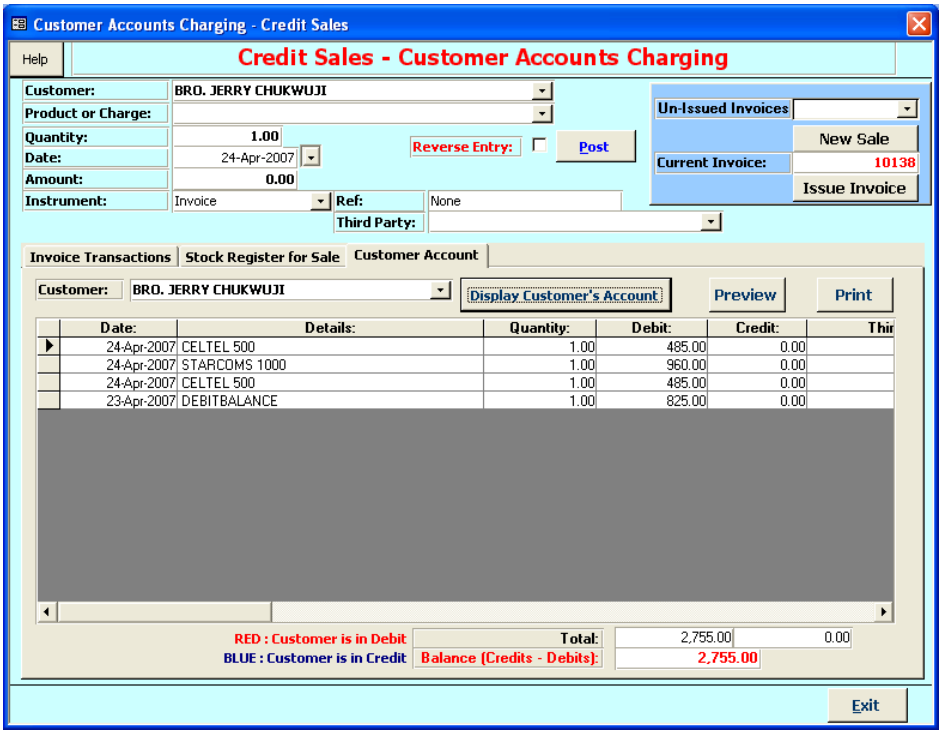
You can do any of these operations on the **Invoice Transactions** tab.

a. Select an invoice from **Invoice Transactions** tab.
b. To re-open an invoice to allow adding extra sales transactions or removing a transaction, click **Re-Open Issued Invoice**.
c. To cancel an invoice, click **Cancel**.
d. To restore a cancelled invoice such that it can be reused, Click **Restore**.
e. To print or preview the invoice, click **Print** or **Preview**.

### 9.2.3 Customers Folios (Account Statements)

The folio or account statement of each customer shows the list of all sales and payment transactions relating to the customer.

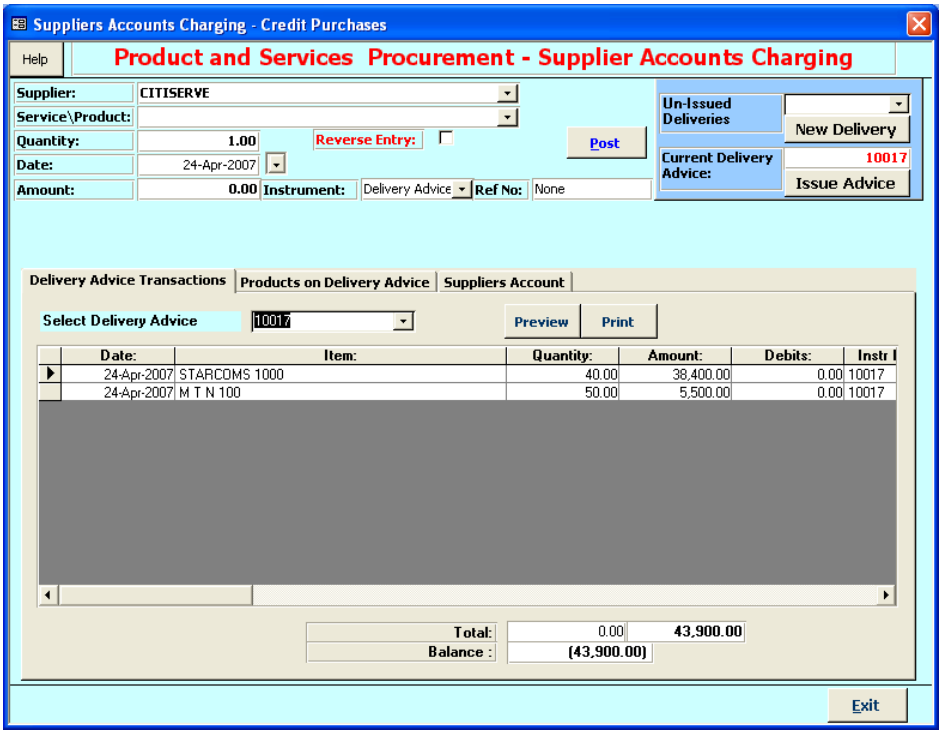
1. The Customer Account tab displays these folio transactions and you can print or preview the account statement by clicking **Print** or **Preview** on the tab.
2. The balance of the folio indicates if the customer is in **credit** with you (**Blue**) or in **debit** (**Red**).
3. Click **Display Customer's Account** to update the folio to reflect new transactions that may have been entered for the customer. This is particularly useful in multi-user operation where user on another workstation may have entered new transactions in the folio.



## 9.3 Products (and Services) Procurement

Products Procurement facility handles the purchase of products from your suppliers. It also handles provision of other services other than products. Each suppliers account is credited with the cost of the products (or service) procured. Payment to the suppliers will be debited and the balance with each supplier is available at any time.

1. Select **Products Procurement** from Financials menu or Click **Products Procurement** on the main interface.
2. Select the **Supplier**.
3. Select the **Service\Product.**
   - If payment is to be made, select **Payment For Stock Procurement**.
4. Enter the **Quantity**. If payment is to be made Quantity text box will be disabled.
5. Enter the **Date.**
6. Enter\Modify the **Amount**, if required**.**
7. Select the **Instrument** and enter the Instrument **Ref** No; for product procurement Instrument will be Delivery Advice by default.




8. Click **Post**. You will be prompted for a delivery advice number if a delivery advice has not been selected or generated for the sales transactions you want to perform.
   The prompt\message will ask if you want to auto-generate a delivery advice.
   c. Click **Yes** if a new delivery advice is required to be auto-generated.
   d. Click **No** if you need to select an existing **Un-Issued Deliveries** or to generate a new delivery advice by clicking **New Delivery**.
   The procurement transactions list will be updated with a new record and the balance updated appropriately.
9. Repeat from 2) to add other products for this procurement. Note that the delivery advice number generated is still in context and will be used for all the transactions.
10. **If a posting is done in error, you must nullify the transaction as follows**
    - Enter the information again from Steps 2) to 8): **Amount must be the same**.

- Click the **Reverse Entry** check box
- Click **Post**. The transaction will be entered and will reverse the wrong posting

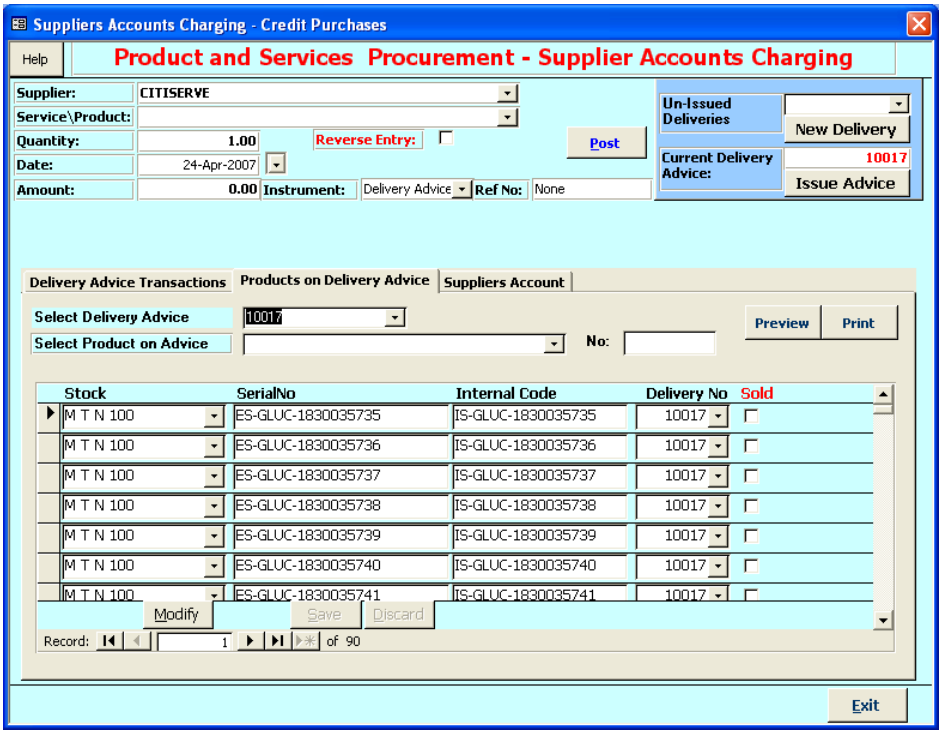
11. When all the products for the procurement have been logged, click **Issue Advice**. The interface will be cleared and delivery advice printed automatically on the printer.
12. Repeat from step 2) for another procurement transaction.
13. You can print\preview the delivery advice transactions report by clicking Print or Preview.

### 9.3.1 Register Stock\Products Delivered

When you procure products, it is customary to register the serial numbers of the products so that each item is identified uniquely. This information is then used to register the product when customers buy them to satisfy warranty and guarantee issues.

In Products Procurement module, when you **Post**, templates are automatically generated for registering the products procured whereby each item has a related templates with unique serial numbers. The actual serial numbers can then be entered to reflect the particular item.

1. Click **Products on Delivery Advice** tab and select a delivery advice to view the templates.
2. Click **Modify** and enter the appropriate serial numbers for each item in **Serial No**. We have provided and extra field labeled **Internal Code** to allow you to define your own identification number for the item, if your company policy requires it own product code.




### 9.3.2 Review Existing Delivery Advice Transactions

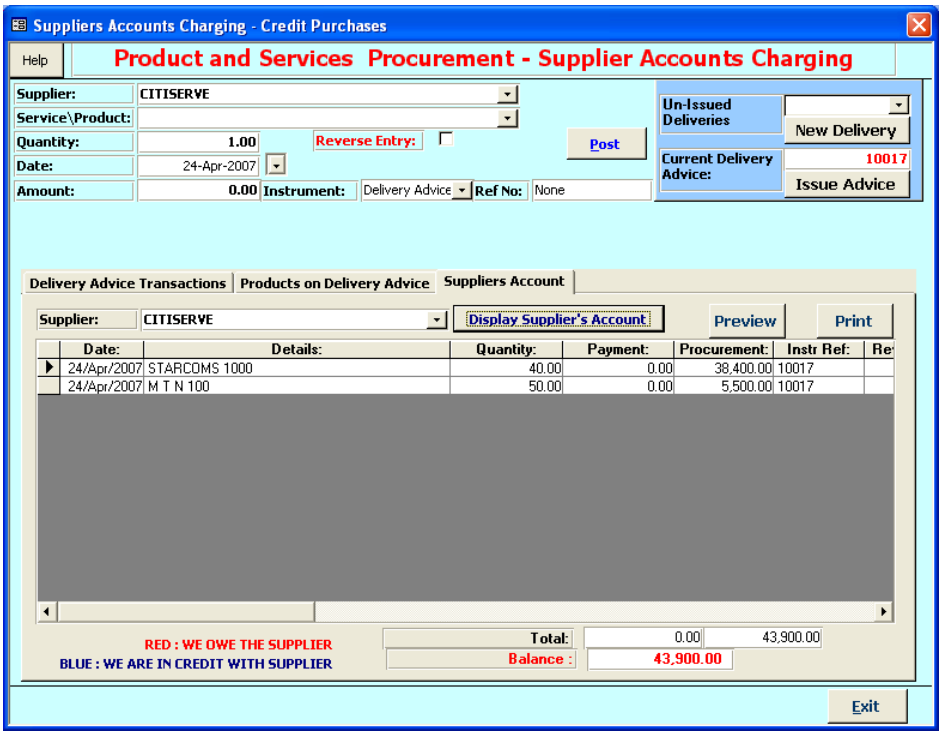
To review existing delivery advices;

1. Select a delivery advice from Delivery Advice Transactions tab.
2. Click **Print** or **Preview.**

### 9.3.3 Suppliers Folios (Account Statements)

The folio or account statement of each supplier shows the list of all sales and payment transactions relating to the supplier.

1. The **Supplier Account** tab displays these folio transactions and you can print or preview the account statement by clicking **Print** or **Preview** on the tab.
2. The balance of the folio indicates if you are in **credit** with the supplier (**Blue**) or if you owe (in **debit**) the supplier (**Red**).
3. Click **Display Supplier's Account** to update the folio to reflect new transactions that may have been entered for the supplier. This is particularly useful in multi-user operation where a user on another workstation may have entered new transactions in the folio.

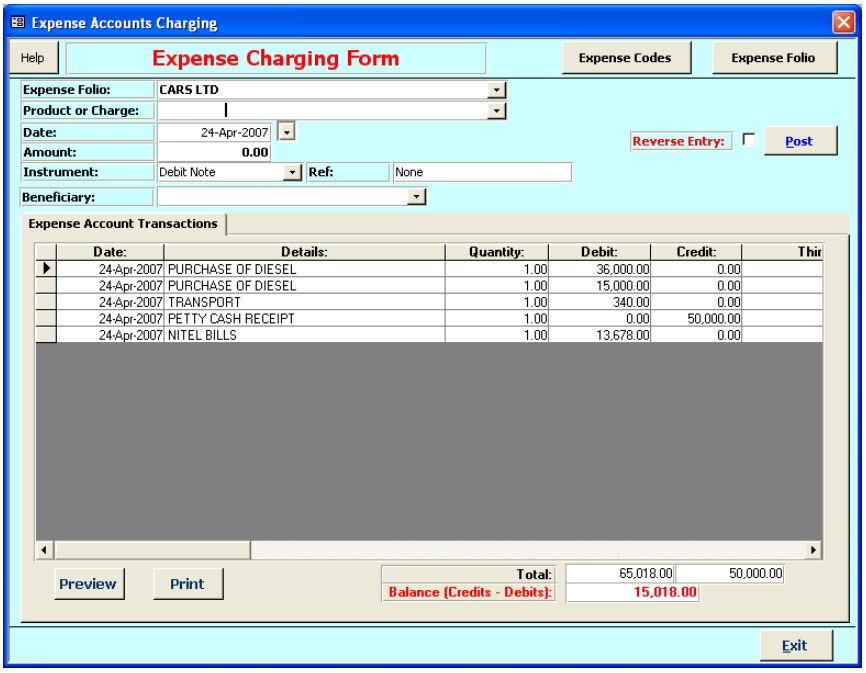


## 9.4 Expense Account Charging

You can track your operational expenses using the Expense Account Charging facility.

- All your expenses would have been defined via **Expense Codes** on the Operational Data menu.
- You would also have set the folio to which to charge your expenses via **Specify Expense Folio** on the same menu. We recommend the expense folio be your company name, which should be created as customer.

1. Select **Expense Account Charging** from Financials menu or Click **Expense Account Charging** on the main interface.
2. Select the expense from **Product or Charge.**
3. Enter the **Date.**
4. Enter\Modify the **Amount**, if required**.**
5. Select the **Instrument** and enter the Instrument **Ref** No; for product procurement Instrument will be Delivery Advice by default.
6. Enter\select the **Beneficiary**.




7. Click **Post**. The transactions list will be updated with a new record and the balance updated appropriately.
8. **If a posting is done in error, you must nullify the transaction as follows**
   - Enter the information again from Steps 2) to 8): **Amount must be the same**.
   - Click the **Reverse Entry** check box
   - Click **Post**. The transaction will be entered and will reverse the wrong posting
9. Repeat from step 2) for another expense.
10. You can print\preview the expense folio report by clicking **Print** or **Preview**.

New expenses can be entered by clicking Expense Code and specify the folio by clicking Expense Folio.

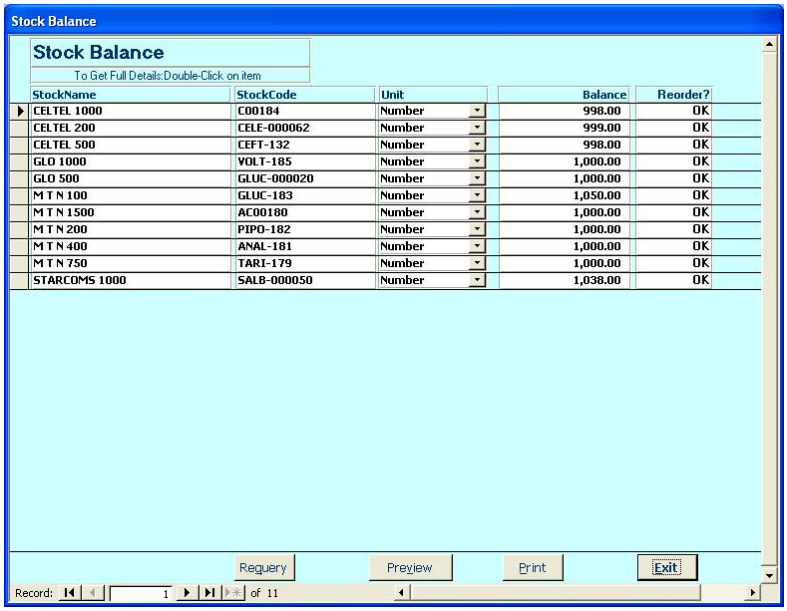
## 9.5 Products Balance, Customers Balance and Suppliers Balance

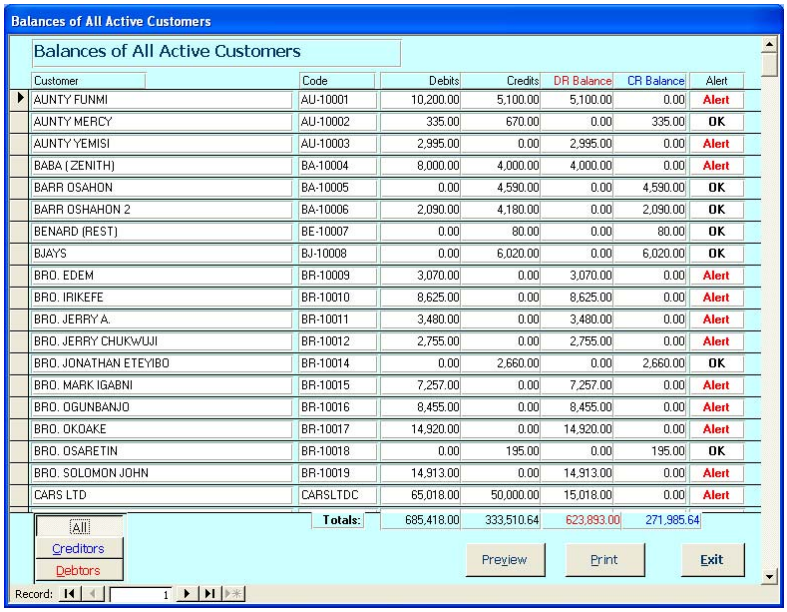
On the main interface or from the Financial menu you click or select

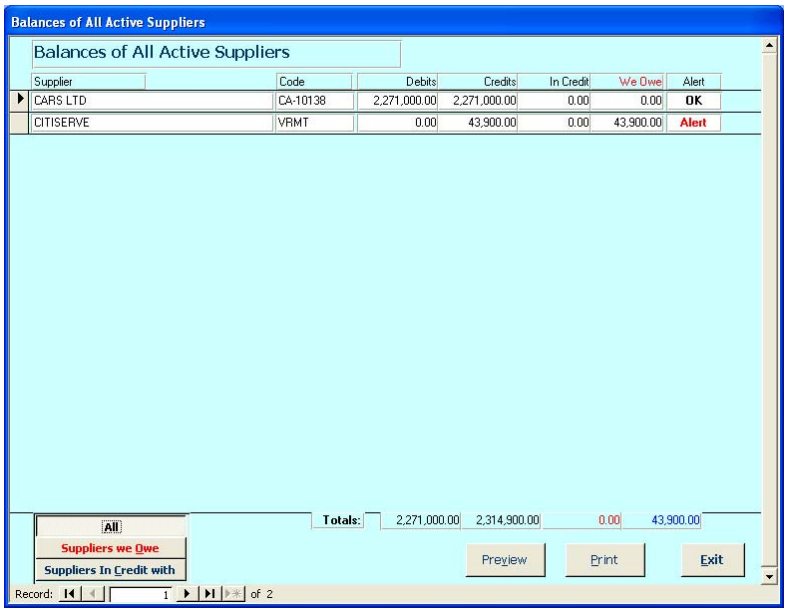
- Products Balance
- Customers Balance
- Suppliers Balance

This will reflect the stock balances, customers' balance and suppliers' balances in your books.

Reorder List, List of Debtors and List of Creditors can also be printed by clicking the appropriately labeled buttons on the interface.




Balances of All Active Suppliers
Balances of All Active Suppliers
Supplier
Code
Debits
Credits
In Credit
We Owe
Alert
CARS LTD
CA-10138
2,271,000.00
2,271,000.00
0.00
0.00
OK
CITISERVE
VRMT
0.00
43,900.00
0.00
43,900.00
Alert
Totals:
2,271,000.00
2,314,900.00
0.00
43,900.00
All
Suppliers we Owe
Suppliers In Credit with
Preview
Print
Exit
Record:
1
of 2

# 10 Enquiries & Report

Typically, reports can be generated for the following

- Sales Invoices
- Sales Receipts
- Delivery Advices
- Product Movement History
- Product Bin Cards
- Customer Account Statements
- Suppliers Account Statements
- Products Reorder List
- Customers Balances
- Suppliers Balances
- List of Creditors
- List of Debtors

These reports can be viewed by clicking appropriately labelled buttons on the main interface. Some Key reports are also grouped into **Daily Reports**, **Monthly Reports** and **Yearly Reports** to provide summaries and transaction details accordingly.

You would, however, have noticed from using Sales Manager that relevant reports can be printed or previewed from each of the interfaces\forms relating to the subject matter dealt with on the interface. Such interfaces\forms will typically have buttons labeled **Print** and **Preview**. For example, on the **Customers Information** entry and modification form you can print or preview the following reports.

1. Customers List
2. Customers Details
3. Customers Invoices
4. Customers Receipts
5. Customers Account Statement

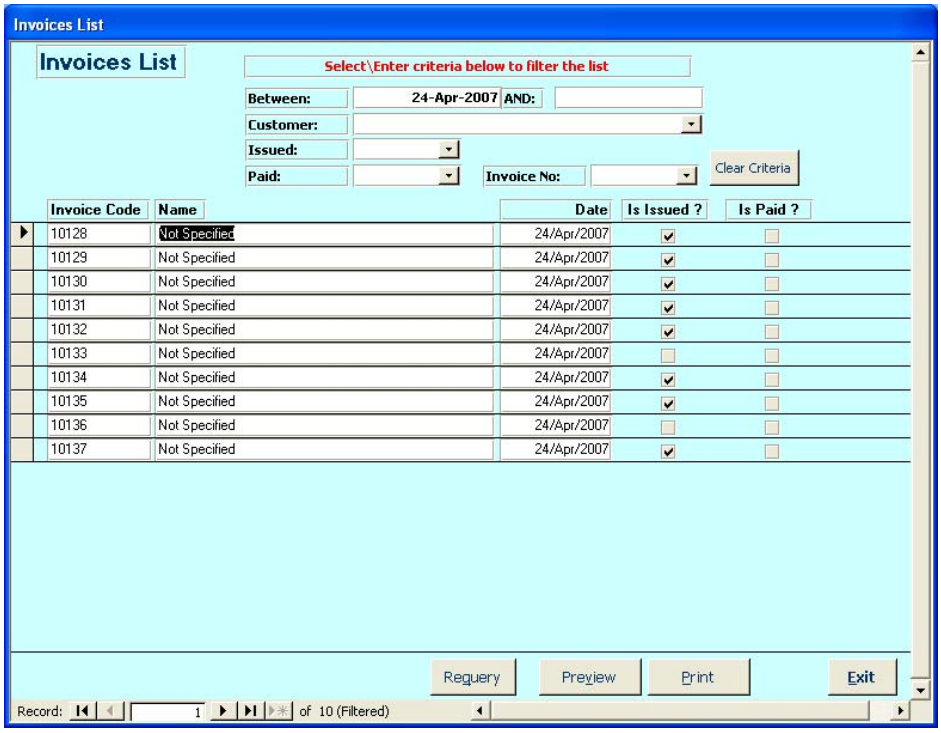
These reports can be generated for the customer in focus and for all customers.

## 10.1 Sales Invoices, Receipts and Delivery Advices Reports

We will work with Sales Invoices Reports; Sales Receipts and Delivery Advices Reports are generated in the same way.

1. Select **Sales Invoices** from the **Enquiries & Reports** menu. This displays the interface depicted below list all the invoices for the current date.
2. To preview the invoice details, double-click on the left hand edge of the invoice record of interest.
3. Select the type of report (if prompted) and then click OK. Te report will be printed on the screen.
4. Select **Print** from the **File** menu to send the report to the printer.
5. If the report has multiple pages and you require to print one or more of the pages, type **Ctrl+P**. The printer interface will be displayed from which you can define your printing options. Click OK to send to the printer.
6. The text boxes at the top of the invoices list interface are for filtering the list of invoices according to the criteria specified in the boxes. You can filter by **Date**, **Customer**, **Status** (Paid, Issued) and the **Invoice number**.
7. To display all invoices generated to date click **Clear Criteria**.

**Similar procedure is followed for Receipts and Delivery Advices.**




## 10.2 Daily, Monthly and Yearly Reports

Daily, Monthly and Yearly Reports facilities are on the Enquiries and Reports menu. They provide daily, monthly and yearly summaries of the transactions performed. The interfaces in the following 3 sections show the scope of reports available and you can filter accordingly for reports on a specific date, a month of the year, and for a particular year.

The following reports are available in a each case.

1. Sales Totals
2. Procurement Totals
3. Payment Logs
4. Product Totals
5. Sales Receipts
6. Sales Receipts Totals
7. Sales Invoices
8. Sales Invoices Balances
9. Delivery Advices
10. Expense Transactions
11. Expense Totals

### 10.2.1 Daily Reports

This provides reports on transactions and summaries for a particular day.

1. Select **Daily Reports** from the **Enquiries and Reports** menu.
2. Click on the button depicting the report you want.

### 10.2.2 Monthly Reports

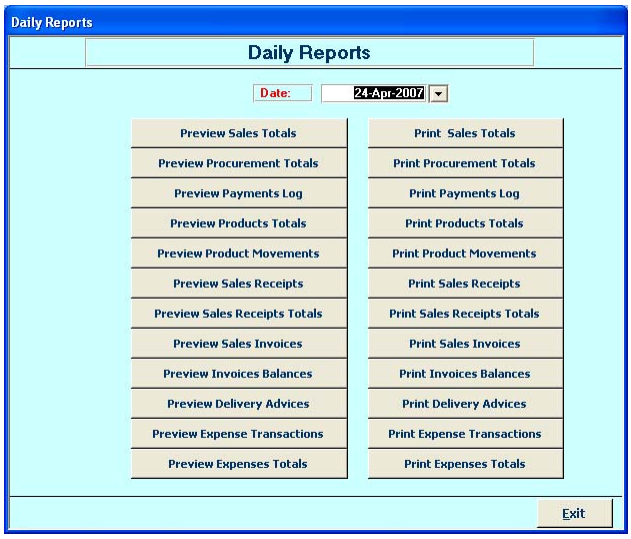
This provides reports on transactions and summaries for a particular month of a year.

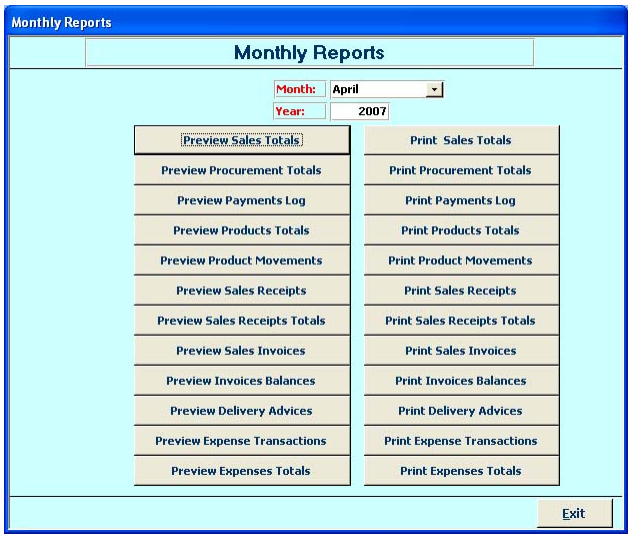
1. Select **Monthly Reports** from the **Enquiries and Reports** menu.
2. Click on the button depicting the report you want.

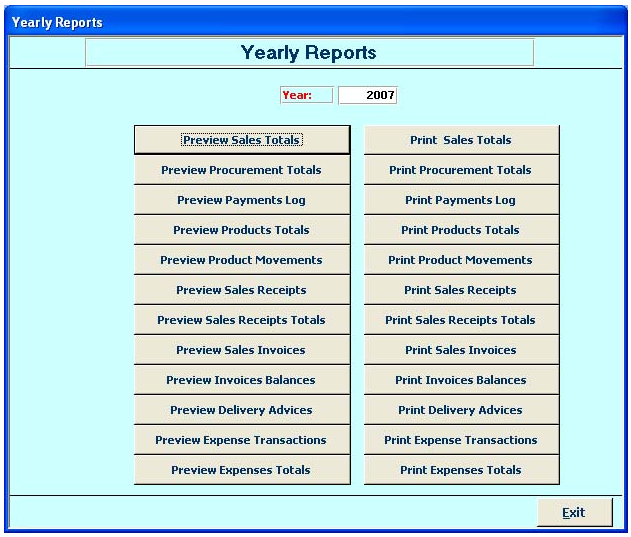
### 10.2.3 Yearly Reports

This provides reports on transactions and summaries for a particular year.

1. Select **Yearly Reports** from the **Enquiries and Reports** menu.
2. Click on the button depicting the report you want.



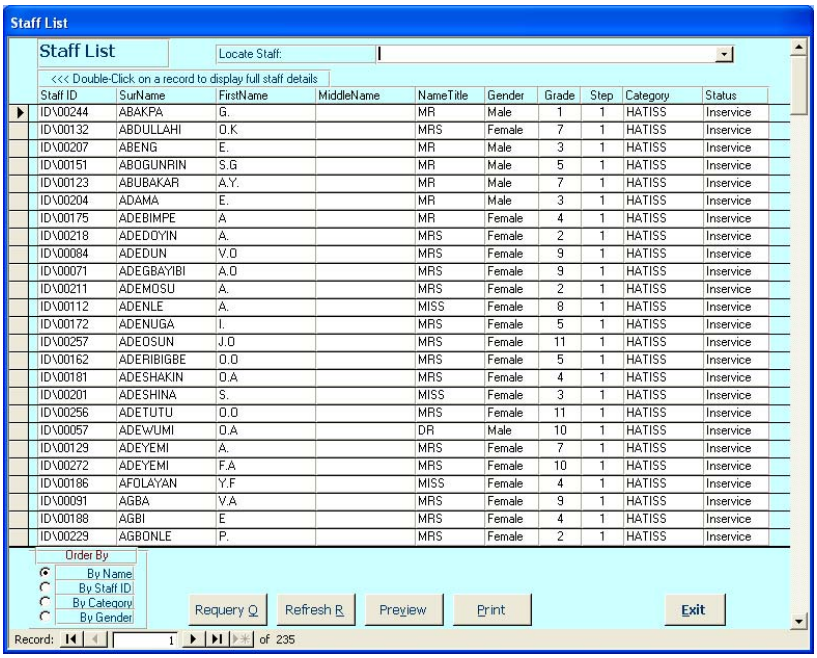




Yearly Reports
Yearly Reports
Year:
2007
Preview Sales Totals
Print Sales Totals
Preview Procurement Totals
Print Procurement Totals
Preview Payments Log
Print Payments Log
Preview Products Totals
Print Products Totals
Preview Product Movements
Print Product Movements
Preview Sales Receipts
Print Sales Receipts
Preview Sales Receipts Totals
Print Sales Receipts Totals
Preview Sales Invoices
Print Sales Invoices
Preview Invoices Balances
Print Invoices Balances
Preview Delivery Advices
Print Delivery Advices
Preview Expense Transactions
Print Expense Transactions
Preview Expenses Totals
Print Expenses Totals
Exit

# 11 Staff Information

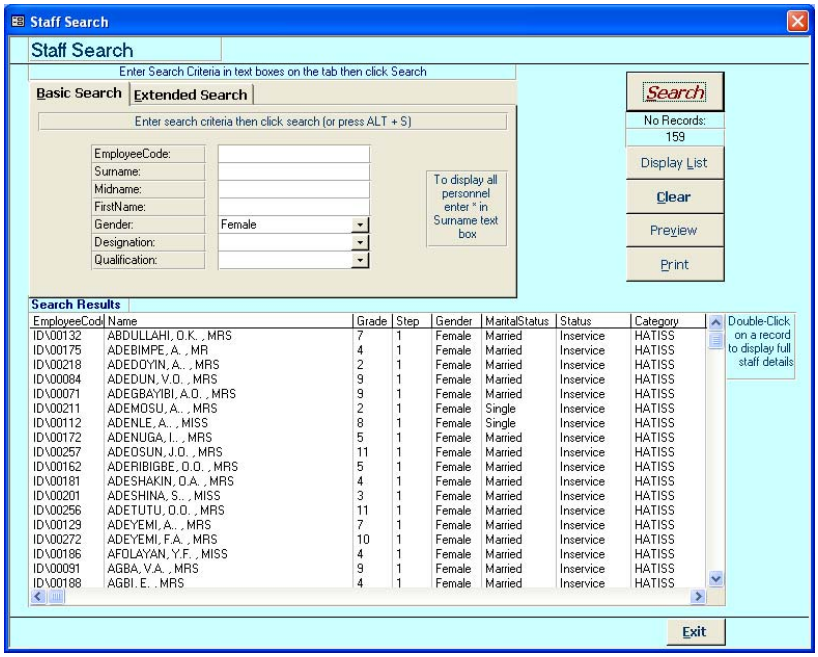
Sales Manager provides a sub module to manage information on the staff of your company. To display list of staff

1. Select **Staff List** from Staff Details menu. This displays the list of staff shown below.
2. To move to a particular staff, select the staff from the combo box **Locate Staff**.
3. Double click on the left edge of the record to display full details of the staff.



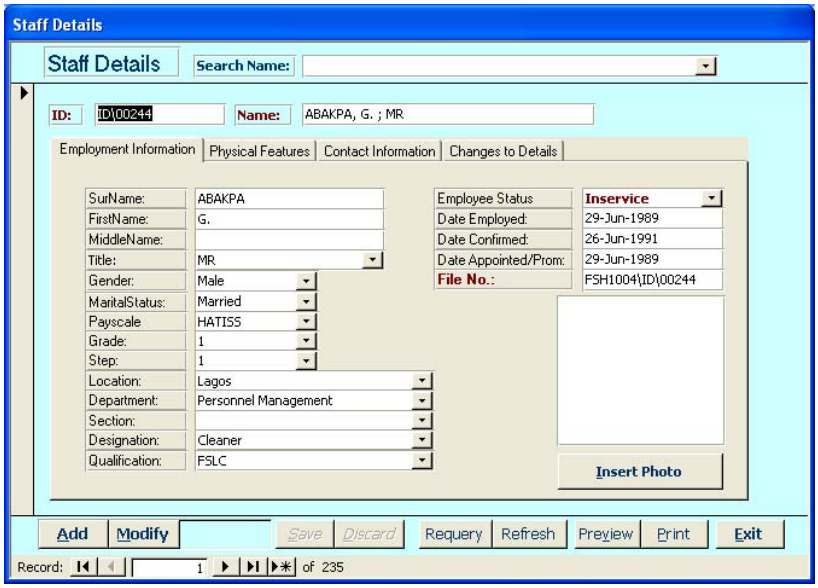

### 11.1.1 To search for staff details

1. Select **Staff Search** from the Staff Details menu. This displays the search interface shown below.
2. Specify search criteria in **Basic Search** tab (and Extended search tab).
3. You can search by one or a combination of
    a. Name,
    b. Surname,
    c. Middle name,
    d. First name,
    e. Gender,
    f. Designation
    g. Qualification
4. Click **Search**. Results matching the specified criteria will be displayed.




11.1.2 To create details of a new staff

1. Select **Staff Full Details** from Staff Details menu.
2. Click **Add**
3. Enter staff details in the
    a. **Employment Information** tab
    b. **Physical Features** tab and
    c. **Contact Information** tab
    d. Click **Insert Photo**, locate and select the staff photo file on your computer.
4. Click **Save**.
5. You can print\preview staff details via print\preview button.
6. To modify details, click **Modify**, change the detail(s) you want, and then click **Save**.

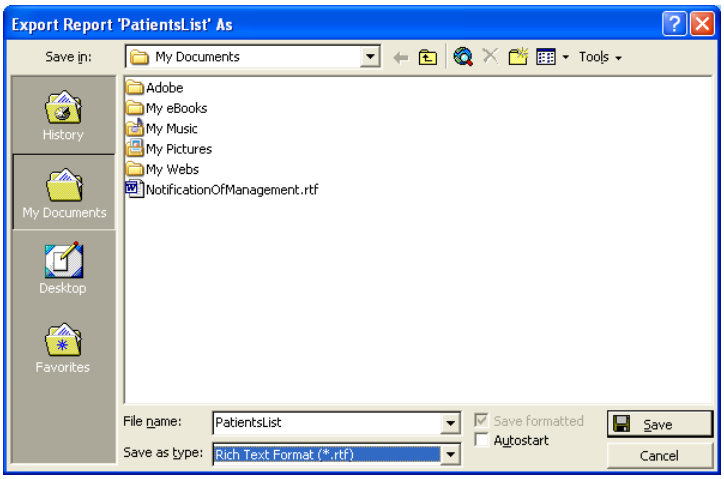


# 12 Exporting Reports to other file formats

You would have noticed by now that you can print set of reports from each of the interfaces. All reports can be printed directly to the printer or preview on the screen. However, Sales Manager offers the flexibility to export report in several file formats such as Microsoft Excel, rich text, snapshot format and any other format supported on your system.

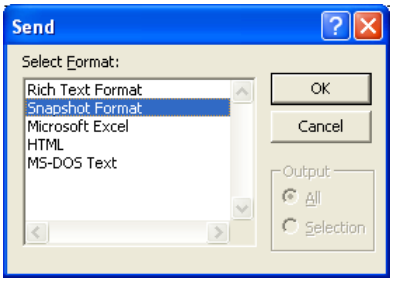
## 12.1.1 To export to other file format

1. From the preview of the report as shown below, select **Export** from **File->Export Information** menu.
2. The dialog box shown below will be displayed.
3. Enter the file name in **File name**.
4. Select the file type to export to in **Save as type**; e.g. Microsoft Excel
5. Navigate to the directory\folder to put the file.
6. Click **Save**.
7. The report will be saved as the specified file type.




## 12.1.2 To export the report as an attachment to e-mail

1. Select **Mail Recipient (As Attachment)** from **File->Export Information** menu.
2. Select the file format on the interface displayed, then Click **OK**.
3. Depending on your Internet settings, specify appropriate settings to send the file as an attachment



# 13 Appendix

## 13.1 Example Reports