MAT SMART SHOP APP

USER GUIDE

MAT Smart Shop is a complete business starter tool that provides a seamless integration of marketing & sales consummation, payment collection, customer database & loyalty management and income and expenses record keeping for small businesses. It is the most flexible and most scalable application that will help you manage your business easy to use with no pre-existing accounting and IT knowledge.

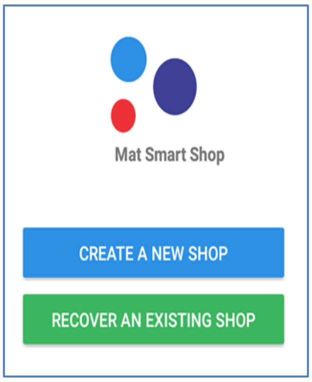
With Mat Smart Shop, you can record your sales transactions offline (when there is no internet) and thereafter sync all your transaction activities to the online platform- (**Mat Smart Shop Web**). On the Web platform, you can have a quick view of the state of your business wherever you are and also record transactions and monitor and adjust inventory.

Features of Mat Smart Shop Mobile Application

- Profit/Loss Report & other reports
- Profit by Transaction Category Reporting
- Invoicing
- Inventory Management
- Expense Tracking
- Customer & Vendor Management
- Customer Loyalty Management
- Online Storefront Access for online ordering
- Conversion of online orders to invoices
- Whatsapp Based Ordering
- Referral Marketing Management
- Budget Tracking
- Integration with payment gateways (Paystack & Rave)

LET’S GET STARTED

- **Download and Install**: get a smartphone, tablet with android version 6.0.0 and above and download from the google play store.



- **Register your company**: Input store details.

- Subscribe to a plan or go for the 14 days free trial.

START –UP GUIDE

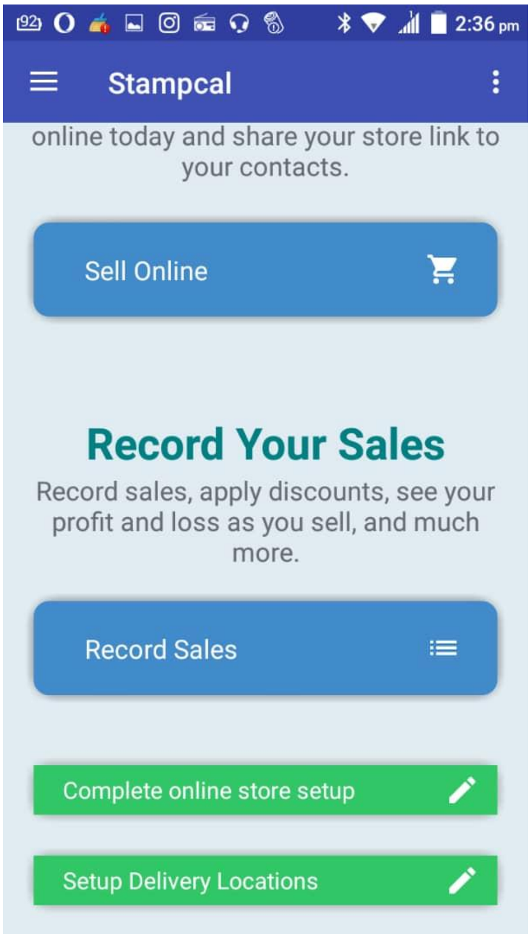
The start-up guide is designed to help you understand how to use the mobile app more like we are holding your hand every step of the way.

- Click on Sell Online to be guided on how to upload product images and description to your storefront and also share item links to your contact.

- Click on record sales to be guided on how to record your sales transaction.

- Complete your storefront setup

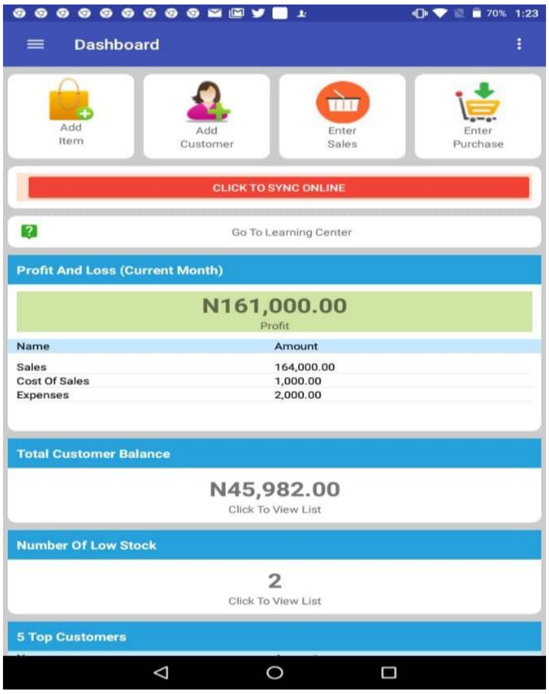
- Set –up delivery locations and fees.



THE MAIN DASHBOARD

Dashboard Business Insights - Mat Smart Shop dashboard displays Quick Launch (shortcuts) to an activity you would like to run and key metrics regarding the state of your business. To access the main dashboard click on **Do More with Main Dashboard** on the start –up guide.

- Monthly Income & Expense report.
- Low stock levels.
- Customers' Balance.
- Customers' Birthday Reminder.
- Subscription Renewal Reminder.
- Access to the learning centre.
- Top 5 customers.
- Pending Quotation list.
- Online Sync Status



SETTING UP

1. Add a New Item

This is used to add up products you sell directly to your customers or the services you render to your clients.

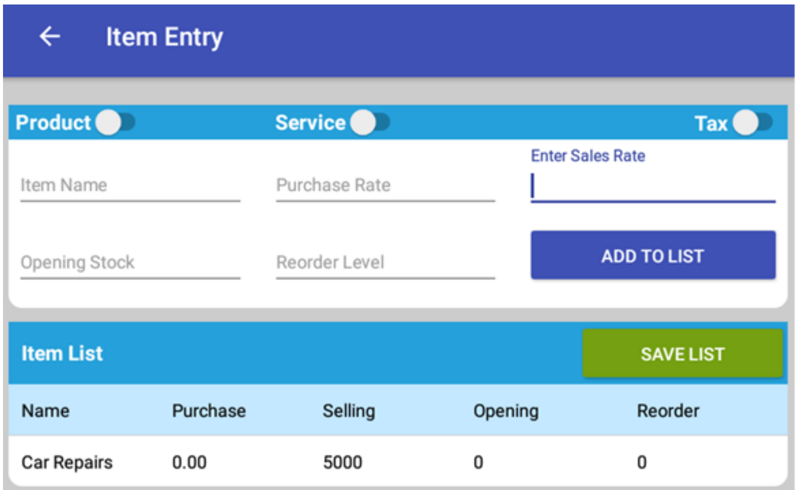
- Click on the **Add item** icon on the dashboard.
- Select the Item type – Product or Service
- Enter necessary details of the item (Item Name, purchase rate, sales rate, opening stock & re-order level)
- To apply tax on the item click on the **Tax icon** > Click **Add list**.

Remember to set your tax rate, Click on Edit Shop from the menu

- Repeat the process above if you have more than one item to create.
- Click **Save List** to finally save the items

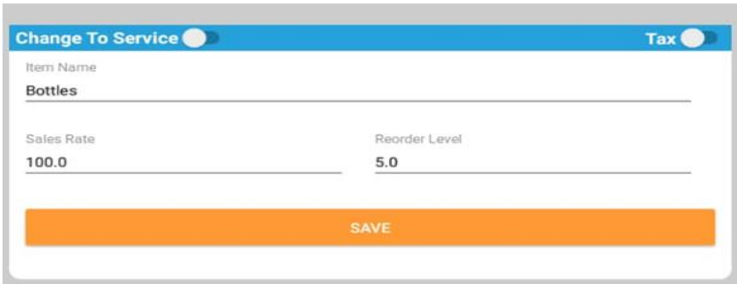
Take Note:

- **Opening stock** – this is the number of currently available items for sale.
- **Re-order level** is the level at which the quantity reaches that triggers a low stock alert on the main dashboard.
- **Purchase Rate:** This is the cost price of an item. The amount the item was bought for by the seller.
- **Sales Rate:** This is the selling price of an item. The amount to be paid by the customer to acquire the product.



Edit an Item

- Select **Inventory list** from the menu
- Click on the item you want to record a purchase > click on **Adjust quantity**
- Adjust the item details > click on **Save**

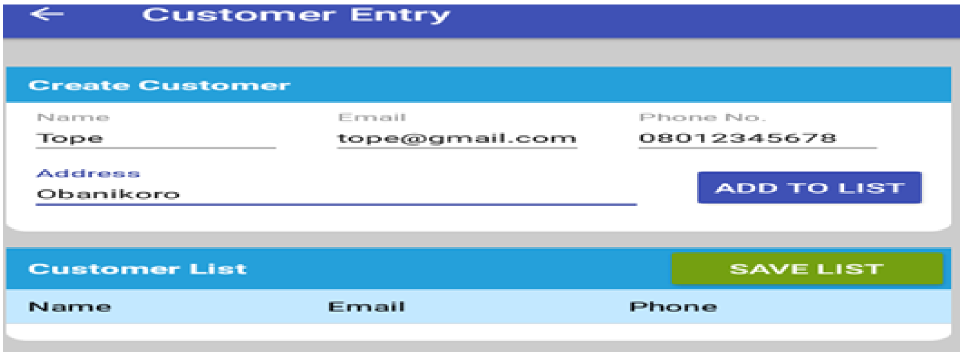


Delete an Item

- Select **Inventory list** from the menu
- Click on the item you want to record a purchase > click on **Delete**

Take Note: To successfully delete an item you must ensure that all transactions relating to the item have been deleted, go to stock details to view all items' transaction**.**

2. **Add a Customer**
   - Click on the **Add Customers icon** on the dashboard.
   - Enter necessary details of the customer – (Name, Email, Phone number & Address).
   - Click on **Add to list**. Repeat the process to add more customers.
   - Finally, click on **save list.**

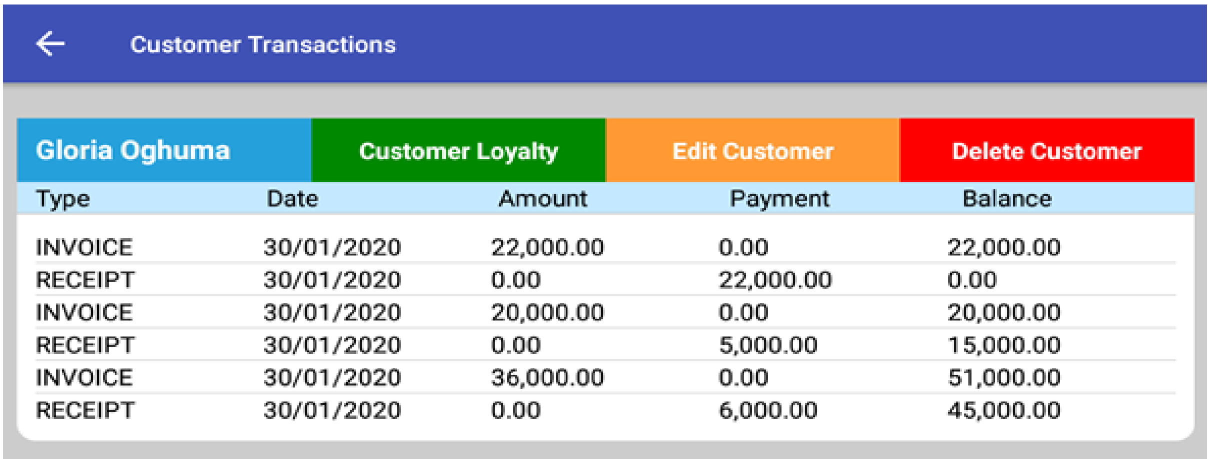


Edit a Customer

- From the main menu, Click on **Customers.**
- Click on the customer of your choice.
- Select edit to make your changes and save.

Delete a Customer

- From the main menu, Click on Customers.
- Click on the customer of your choice.
- Select edit to make your changes and save.

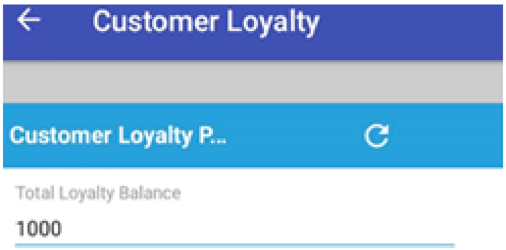


Type	Date	Amount	Payment	Balance
INVOICE	30/01/2020	22,000.00	0.00	22,000.00
RECEIPT	30/01/2020	0.00	22,000.00	0.00
INVOICE	30/01/2020	20,000.00	0.00	20,000.00
RECEIPT	30/01/2020	0.00	5,000.00	15,000.00
INVOICE	30/01/2020	36,000.00	0.00	51,000.00
RECEIPT	30/01/2020	0.00	6,000.00	45,000.00

Note: To successfully delete a customer you must ensure that all transactions relating to the customer have been deleted

View Customer Loyalty Balance

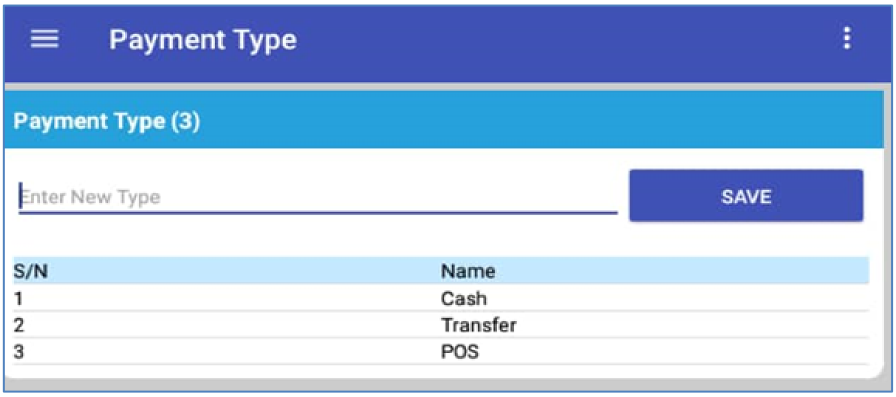
- Click on Customers from the main menu and then click on the customer you want to view
- Click on customer loyalty and click on the refresh icon to see the updated Reward balance.



3. Add a New Payment Type

Payment types are your bank accounts and petty cash.

- Click **Payment Type** from the main menu
- Enter the new payment in the space provided
- Click **save**



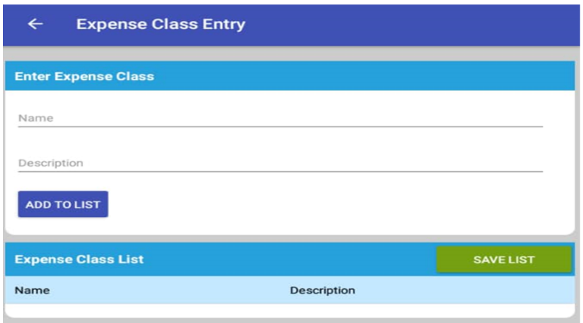
To delete a Payment type

- Select **Payment Type** from the main menu
- Click on the payment type you to delete
- Select Yes

4. Add an Expense Class

An expense class is used to list out all the expenses that your business incurs. Examples of expense class include salaries, security fee, electricity, transportation, cleaning fee, generator repairs, laptop repair, and generator fuelling etc.

- Click **Expense Class** from the menu > click on new expense class
- Enter the name and description
- Click **Add to list**
- Repeat the process above if you have more than one expense class to create
- Click **Save**



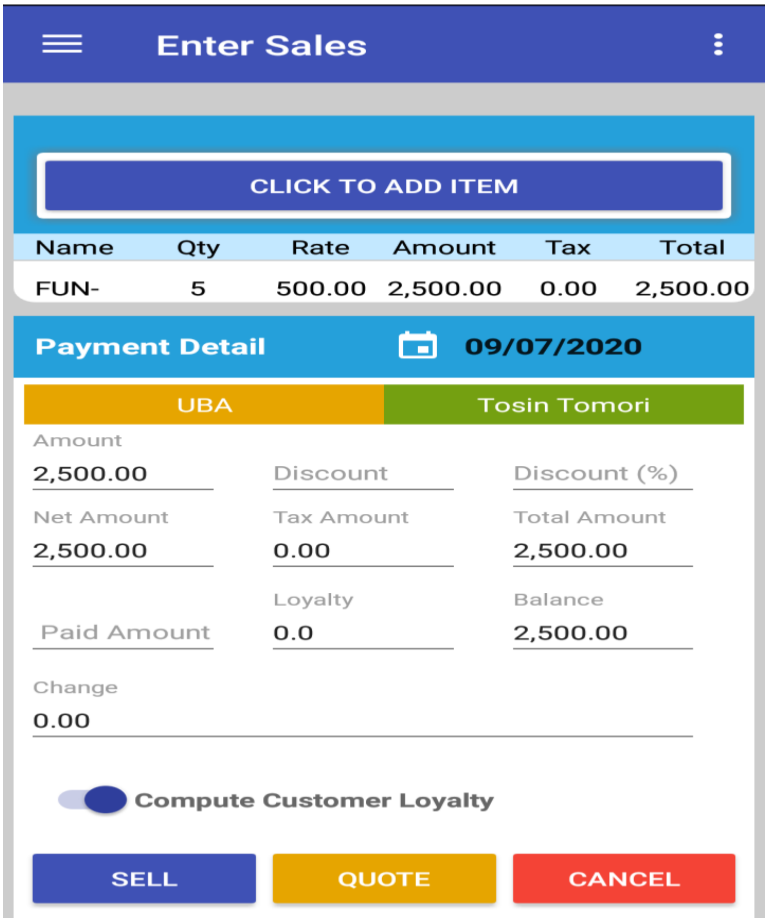
RECORDING TRANSACTIONS

1. Recording Sales Transactions

- Click on the **Record sales** from the start-up page or select **Enter Sales/Quotation** from the main menu**.**

- Click on **Add item** to select the items your customer wishes to buy (enter the quantity to be sold, apply/un-apply tax) & click on **Add.**

- Select a customer (this is compulsory when making a credit sales) & click on the Calendar icon to select the date of transaction.
- Select the payment type.
- Apply a discount in percentage (%) or amount.
- Apply Loyalty reward as a form of discount (Optional)
- Enter the amount paid by the customer.
- Turn on **compute customer loyalty** (This action means want to calculate loyalty reward on the invoice).
- Click on **Sell** to save as invoice & print out the sales invoice using a Mobile Bluetooth Printer and also send out the invoice via email/Whatsapp.


Enter Sales
CLICK TO ADD ITEM
Name Qty Rate Amount Tax Total
FUN- 5 500.00 2,500.00 0.00 2,500.00
Payment Detail
09/07/2020
UBA
Tosin Tomori
Amount
2,500.00
Discount
Discount (%)
Net Amount
2,500.00
Tax Amount
0.00
Total Amount
2,500.00
Paid Amount
Loyalty
0.0
Balance
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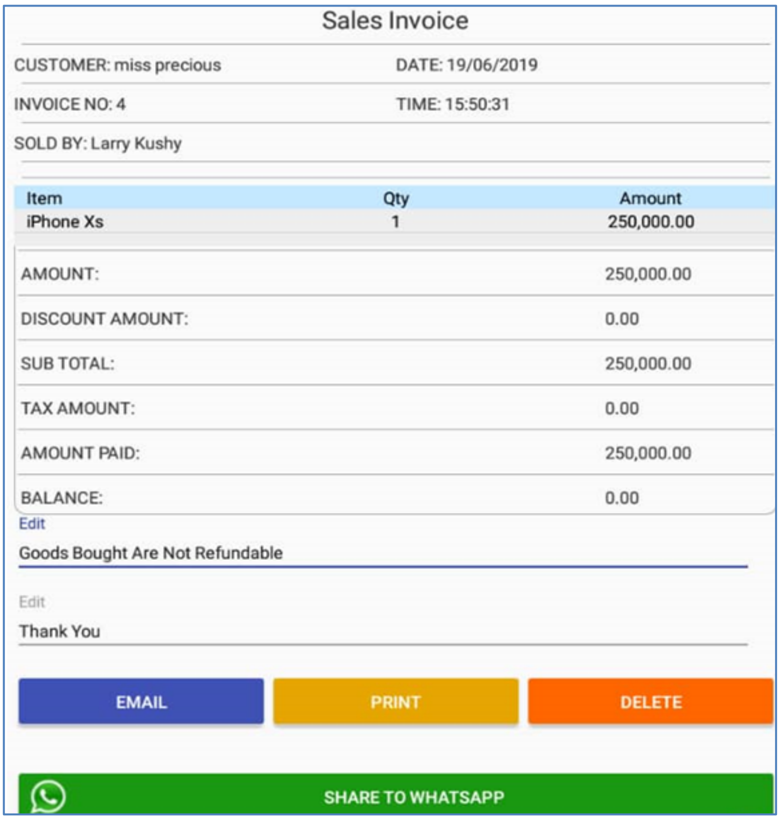
Change
0.00
Compute Customer Loyalty
SELL
QUOTE
CANCEL


Sales Invoice
CUSTOMER: miss precious
DATE: 19/06/2019
INVOICE NO: 4
TIME: 15:50:31
SOLD BY: Larry Kushy
Item Qty Amount
iPhone Xs 1 250,000.00
AMOUNT: 250,000.00
DISCOUNT AMOUNT: 0.00
SUB TOTAL: 250,000.00
TAX AMOUNT: 0.00
AMOUNT PAID: 250,000.00
BALANCE: 0.00
Edit
Goods Bought Are Not Refundable
Edit
Thank You
EMAIL
PRINT
DELETE
SHARE TO WHATSAPP

Take Note: To be able to share invoices via whatsapp, you need to give Smart Shop the permission to your phone storage. Go to your phone settings > open the applications > select Smart Shop > Click on Permission > Assign the permission.

To view & delete your sales transaction

- Click on **Sales list.**
- Click on the sales to recall or delete the invoice > click on **delete**.

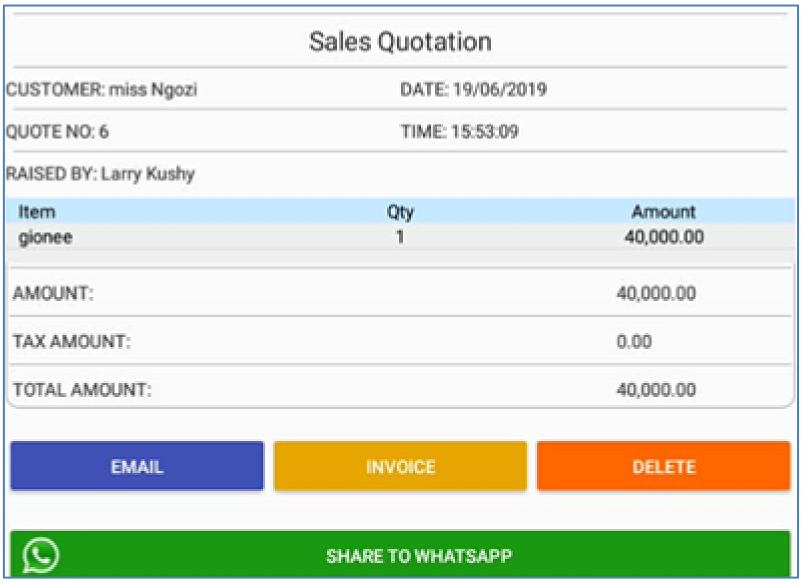
Take Note: when an invoice is deleted remember to delete the receipt associated with that invoice (If any). Get the receipt details from the transactions of the customer.

2. **Record a Sales Quotation**

- Click on the **Record sales** from the start-up page or select **Enter Sales/Quotation** from the main menu**.**
- Click on **Add item** to select the items your customer wishes to buy (enter the quantity to be sold, apply/un-apply tax) & click on **Add.**
- Select a customer (this is compulsory) > Click on the **Calendar** icon to select your Date of Transaction.
- Click on **Quote** to save & print out the sales quotation using a Mobile Bluetooth Printer and also send out the quote via email/WhatsApp or click **Cancel** to erase the entry.

To convert a Sales Quotation to a Sales Invoice

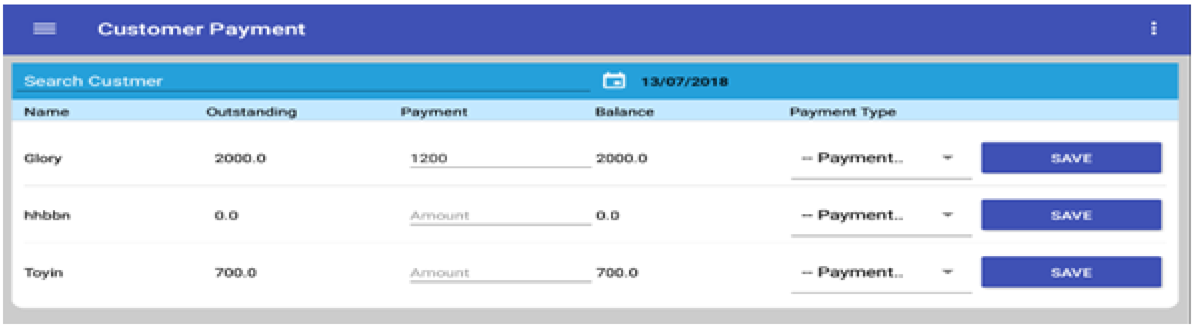
- Click **Quotation List** from the menu bar.
- Click the quotation you wish to convert.
- When the sales quotation comes up, click on **invoice.**
- Make your changes and **save**



3. Record Payment from Customers

To receive further payment on an invoice from a customer:

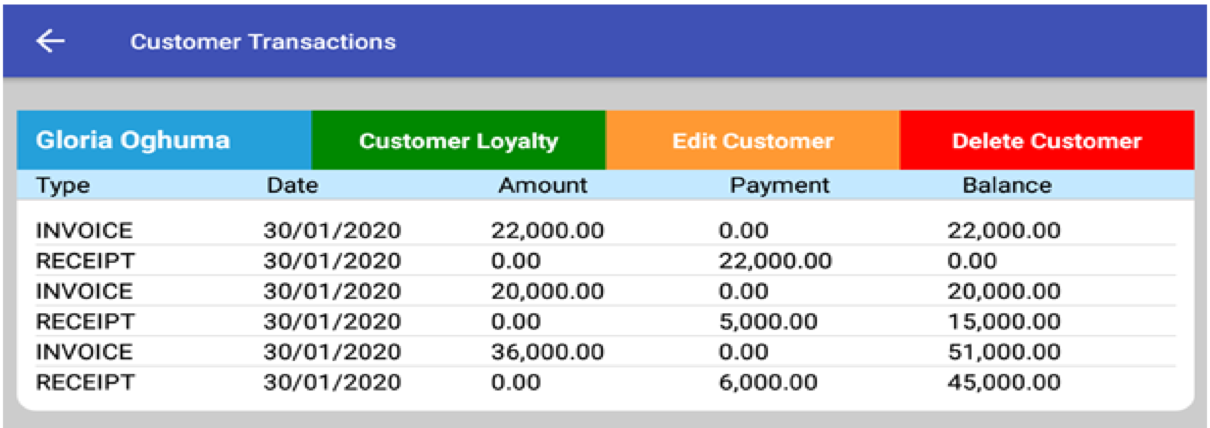
- Click on **Customer Payment** from the main menu.
- Enter the amount received from the customer and select the **payment type.**
- Finally, click **Save.**



How to delete payment received from customers

- Select **Customers** from the main menu
- Click on the customer of your choice

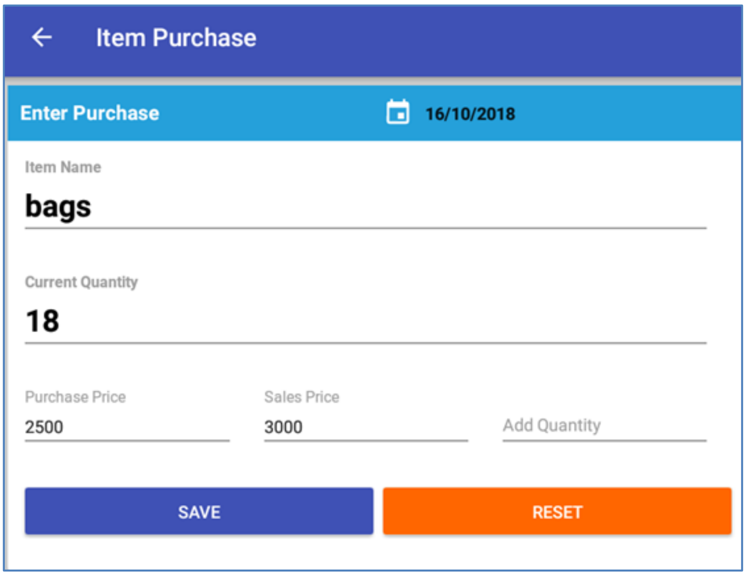
- Under the transaction detail of the customer, click on the payment made by the customer, then click on yes to delete



Type	Date	Amount	Payment	Balance
INVOICE	30/01/2020	22,000.00	0.00	22,000.00
RECEIPT	30/01/2020	0.00	22,000.00	0.00
INVOICE	30/01/2020	20,000.00	0.00	20,000.00
RECEIPT	30/01/2020	0.00	5,000.00	15,000.00
INVOICE	30/01/2020	36,000.00	0.00	51,000.00
RECEIPT	30/01/2020	0.00	6,000.00	45,000.00

4. Record your Item Purchase

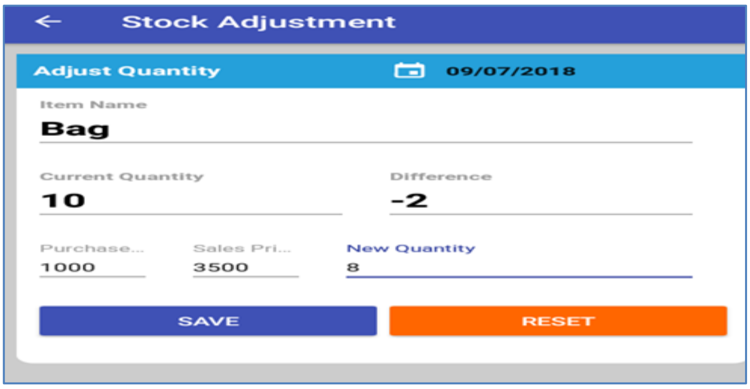
- Select **Inventory list** from the menu or click the purchase icon on the dashboard.
- Click on the item you want to record a purchase > click on **Enter purchase.**
- Click on the Calendar icon to select your date of purchase.
- Enter the quantity purchased and select **save** or **reset** to clear off the quantity entered.



5. **Stock Adjustment**

Stock adjustment is done when there is an increase in the quantity of product which is not caused by product purchases or decreases the quantity of product which is not caused by product sales. A decrease in the number of your products can be caused by theft and donation/gift.

- Select **Inventory list** from the menu.
- Click on the item you want to adjust > click on **adjust quantity.**
- Click on the Calendar icon to select your date of adjustment.
- Enter the new quantity of the item > click save or click reset to clear off the quantity entered.



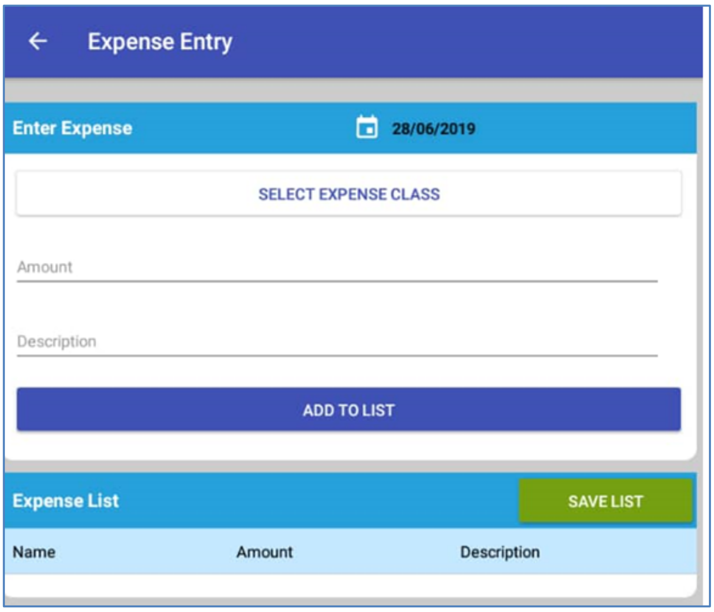
View Item Transactions & Delete an Item Purchase or Adjustment

- Select **Inventory list** from the menu
- Click on the item you want to view > click on **Stock Details**
- Adjust the time range to view all transactions done with the item
- Click on the purchase or adjustment you want to delete

6. Recording Business Expenses

After creating all your expense classes, you can then proceed to record all your incurred expenses.

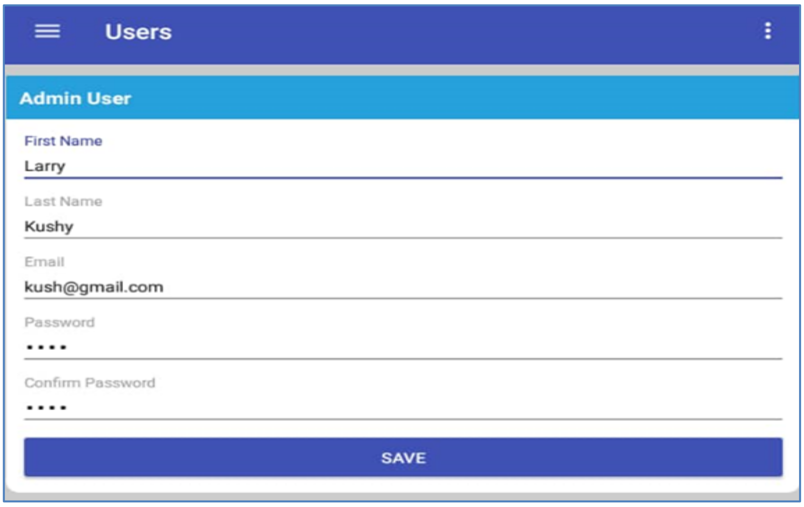
- Click **Expenses** from the menu
- Select the **expense class** and enter the amount of the expense
- Click **Add to list** then click **Save**



ADMIN MANAGEMENT

1. Edit the Admin User Details & Change Admin User Password

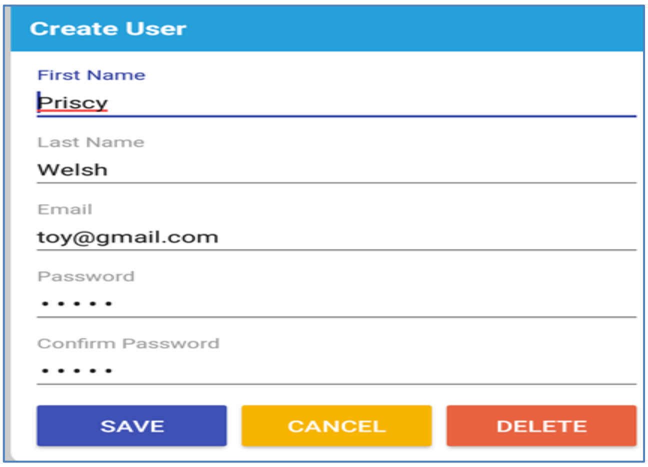
- Click **Admin User** from the menu
- Change the details of your choice
- Click **Save**



2. Create other Users

Apart from the admin user, you can further create other users to access your account.

- Click **Other Users** from the menu
- Enter the details of the user
- Click **Save**



Edit the Other User Details & Change Other Users Password

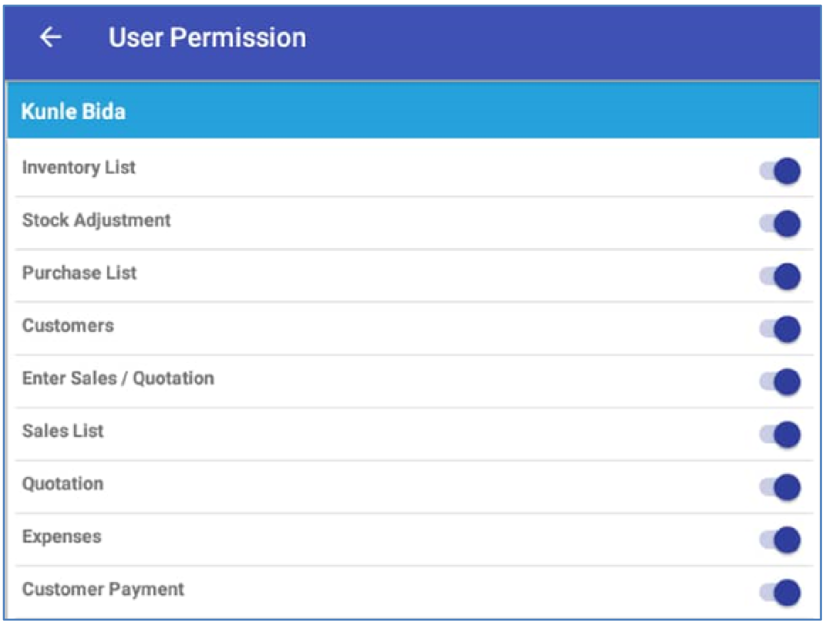
- Click **Other Users** from the menu
- Under the user list, click on the user you want to change
- When the details of the user appear, change the details and password
- Click **Save**

Delete Other Users

- Click **Other Users** from the menu
- Under the user list, click on the user you want to delete
- When the details of the user appear, select **Delete**

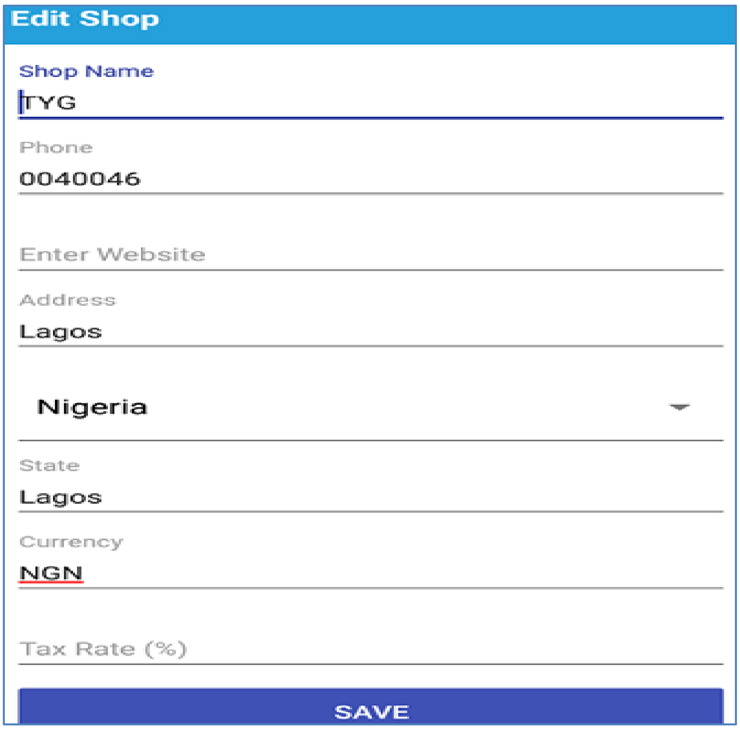
Assign User Permission to Other Users

- Click **User Permission** from the menu.
- Select the other user you want to assign permission to.
- When the details of the user appear, change the details and password.
- Check the right to assign permission or uncheck to remove the right.



3. **Edit your shop details**
   - Click **Edit Shop** from the menu.
   - Enter your Sales tax Rate.

- Make any other changes and save.
- Log out and log in back to effect changes.



4. Subscription Renewal

- Click **Subscription** from the menu > click on please subscribe.
- To whether your subscription is still running, click on check subscription online.

BUSINESS REPORTS

Your business reports are just a click away. To access the following reports click on it from the main menu.

- **Sales Report** - this shows all the sales recorded within a time range.
- **Inventory Value Report** – this shows all the items left unsold and their values.
- **Expense Report -** this shows all the expenses recorded within a time range.
- **Customer Follow Up Report -** this shows customers that are yet to patronize your business.
- **Tax report** – this shows details of all taxes paid on invoices.

OTHER ACTIVITIES

1. How to recover password

- On the login page click on **Forgot Password**
- A default password would be sent to your email, enter the default password sent to you

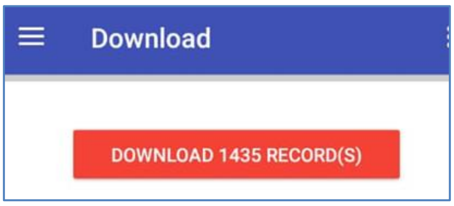
To change the default password

- Click on Admin User from the main menu
- Change the password
- Click on **Save**

2. Bringing in Transactions generated on the Web Platform

This is only applicable when you use the mobile app alongside with the web/online version.

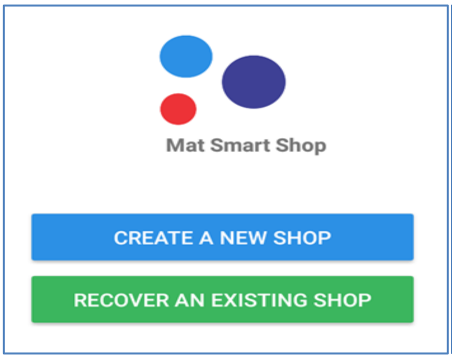
- From the main menu select **Download** if you have transactions to download the button will be red as shown below, click on the red button to download the transactions.

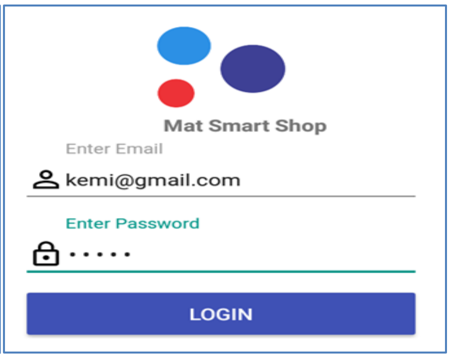


3. How to Recover your Store

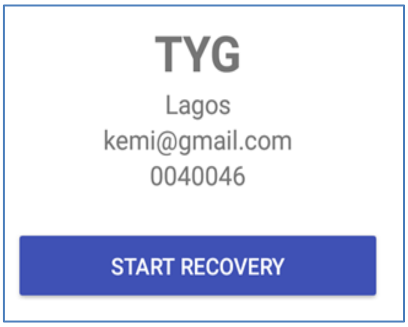
This is to be done when you need to transfer the app from your current phone to another download

- After downloading the app from Google play store
- Select **recover an existing shop** and enter your login details

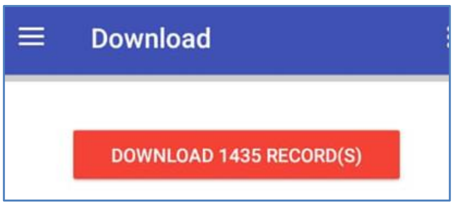




- Click on **Start recovery** and select **yes**



- After recovering, check if you have transactions on the web version. **(This is only applicable when you use the mobile app alongside with the web/online version).** From the main menu select **Download** if you have transactions to download the button will be red as shown below, click on the red button to download the transactions.



Requirements to Get Started

- Get a Smart Phone & Tablets with version 6.0.0 and above. Download from the Play Store.
- Get a Mobile Bluetooth Printer.
- Sign up for the 14 days free trial. No credit card required, and no commitments whatsoever.
- Subscribe upon the expiration of the trial period.

Visit:
www.matsmartshop.com for more details on Mat Smart Shop App

Follow us on all social media platforms @matsmartshop

Sales: sales@matsmartshop.com
Enquiries: info@matsmartshop.com
Contact:
+234-8173943723 | +234-9092942048