

MAT SMART SHOP

(WEB VERSION)

User Guide



CREATING A PROFILE ON MAT SMART SHOP (WEB VERSION)

How to Set up your Profile

- On the login page click on **New to Mat Smart Shop**
- Fill in all details

Company Name	Address
First Name	Phone Number
Last Name	Select Country ▼
Email Address	State
Password	Currency
Confirm Password	CREATE COMPANY

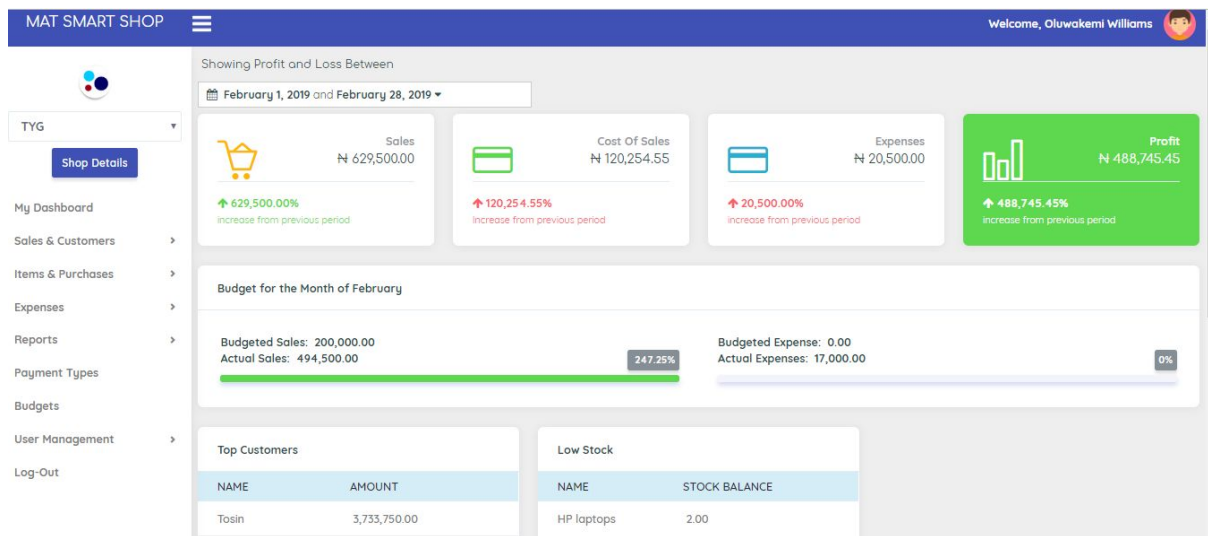
PRESTIGE SCHOOL	Anthony
Prestige	0805688999
School	Nigeria ▼
prestiges@gmail.com	Lagos
*****	NGN
***** ✓	CREATE COMPANY

- Click on Create Company
- Subscribe immediately or use the trial period

THE DASHBOARD

Dashboard Business Insights - Mat Smart Shop dashboard displays key metrics regarding the state of your business

- Income & Expense
- Low stock levels
- Customer & Vendor Balance.
- Top Customers
- Budgeted Sales Progress
- Customer Anniversary Reminder



SETTING UP

Add New Items

- From the main menu, click on Items & Purchases, select click on Item Info & Management

Items List

Show 10 entries

Search:

ITEM NAME	ITEM TYPE	PURCHASE RATE	SALES RATE	QUANTITY	RE-ORDER	MANAGE
Barrel Ridge Cap Bracken/Pepper	PRODUCT	3,500.00	4,500.00	100	10	
Wall Flashing Antico	PRODUCT	3,500.00	4,500.00	100	10	
Wall Flashing Azure/Delta Blue/Sapphire	PRODUCT	3,500.00	4,500.00	100	10	
Wall Flashing Cedar	PRODUCT	3,500.00	4,500.00	100	10	
Wall Flashing Chestnut/Teak	PRODUCT	3,500.00	4,500.00	100	10	

* To add new items click on **Create Item** or **Upload from Excel**

*Click on the Manage icon to view stock details and edit or delete your items

- Enter necessary details of the item (Name, purchase rate, sales rate, opening quantity & re-order level)
- Select the item type
- Click Add to list.
- Repeat the processes above if you have more than one item to create.
- Click Save

Note:

- Opening quantity** – this is the number of currently available items for sale.
- Re-order level** is the level at which the quantity reaches that triggers a replenishment alert.
- 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.

Item Name

Select Item Type ▼

Purchase Rate

Sales Rate

Opening Quantity

Re-Order Level

ADD TO LIST

S/N	ITEM NAME	ITEM TYPE	PURCHASE RATE	SALES RATE	RE-ORDER LVL	QTY
-----	-----------	-----------	---------------	------------	--------------	-----

Close

SAVE

Using the Upload Function to add New Items

This is recommended if you already have an excel file of all your items.

- Select **Items & Purchases** from the menu, then select **Item Info & Management**
- Click on upload from excel

Upload from Excel

- Download the sample template .

[CLICK HERE TO DOWNLOAD SAMPLE TEMPLATE](#)

- Open a new excel sheet and enter your details as shown in the sample template.
- Upload the excel file.

[CLICK HERE TO BROWSE OR DRAG AND DROP FILE HERE](#)

- Click on import data

IMPORT DATA

- Finally click on save

SAVE

Add a New customer

- Click on **Sales & Customers** from the menu
- Select **customer info & management** > click on **Create Customer**
- Enter details of the customer (Name, Email, Phone number And Address)
- Click Add to list.
- Repeat the processes above to add more than one customer.
- Click Save to finally save.

Customers List

Show entries

Search:

CUSTOMER NAME	PHONE	EMAIL	ADDRESS	BALANCE	MANAGE
Adeyinka	7899000	yinka@gmail.com	-	105,000.00	
Cash	-	-	-	0.00	
Kemi	7559	kemigjk@gmail.com	lag	50,750.00	
Tosin	7779	tosin@gmail.com	-	112,500.00	
Toyin	-	-	-	- 100,000.00	
Wade	-	-	-	10,000.00	

*Click on the Manage icon to view customer transactions, **edit** and **delete** your customer

Note that you cannot delete a customer if you have existing transactions with that particular.

Create New Customers

Name Email Phone Number

Address

ADD TO LIST

S/N	NAME	EMAIL	PHONE	ADDRESS
-----	------	-------	-------	---------

Close **SAVE**

Using the Upload Function to add New Customers

This is recommended if you already have an excel file of all your customers

- Click on **Sales & Customers** from the menu
- Select **customer info & management** > click on upload from excel

Upload from Excel

- Download the sample template and fill in the necessary details

[CLICK HERE TO DOWNLOAD SAMPLE TEMPLATE](#)

- Open a new excel sheet and enter your details as shown in the sample template.
- Upload the excel file

[CLICK HERE TO BROWSE OR DRAG AND DROP FILE HERE](#)

- Click on import data

IMPORT DATA

- Finally, click on save







SAVE

Add a New Vendor

- Click on **Purchase & Vendor** from the menu, then click on **vendor info & management**
- Click on **Create Vendor**
- Enter details of the vendor
- Click Add to list.
- Repeat the processes above to add more than one vendor
- Click Save to finally save.

Vendors List Create Vendor

Show entries Search:

VENDOR NAME	PHONE	EMAIL	ADDRESS	BALANCE	MANAGE
Idumota	-	-	-	0.00	
Idumota	-	-	-	0.00	 Edit Vendor  Delete Vendor
Jumia4	-	-	-	0.00	
KFC	-	-	-	0.00	
KGL	-	-	-	0.00	

***Click on the Manage icon to view a vendor's transactions, edit and delete your vendor.**

Adding up a Transaction Class

You can go beyond the regular recording of all your business income and expenses to categorizing a specific record of sales and expense.

In Mat Smart Shop, you can create transaction classes that can be assigned to your sales transactions and business expenses. This lets you track records by business location, department, or any other meaningful breakdown of your business.

Many business owners have different divisions of their business that they want to keep a close eye on; by using the transaction class feature, you can define these divisions and track their associated invoices and expenses. Greater control over expense and income categorization is the primary benefit of transaction class tracking.

Businesses with different departments or locations can use classes to get profitability for each department/location.

For example, if you had a cleaning service with three locations, you might create Maryland, Yaba, and Island transaction classes for tracking profitability by location. At the end of a given period, the cleaning service could create separate reports for each location.

Transaction Class tracking helps you get an excellent overview of your company expenses and can see how your money is being spent. With this information, it's much easier to stay on top of your budget.

This feature needs to be activated

- Select Transaction class from the main menu
- Check the Activate Class Box

☐ Activate Transaction Class

- By default a general class is created, to add more classes click on **new class**

New Class

- Enter the name and description
- Click **Add to list** then click **Save**


New Transaction Class

×

Class Name

Descriptions

ADD TO LIST

S/N ↑↓	NAME ↑↓	DESCRIPTION ↑↓	↑↓
1	Yaba	Yaba Location	

Showing 1 to 1 of 1 entries

Previous

1

Next

Close

SAVE

Add new payment types

Payment types are your bank accounts and petty cash.

- Click **Payment Type > New Payment Type**

Payment Types
Home / Payment Type

Payment Type List
New Payment Type

Show 10 entries
Search:

S/N	NAME	
1	Cash	
2	Access Bank	
3	UBA	

Showing 1 to 3 of 3 entries
Previous 1 Next

- Enter the name and save

Create New PaymentTypes x

Name
ADD TO LIST

Show 10 entries
Search:

S/N	NAME	
1	POS	

Showing 1 to 1 of 1 entries
Previous 1 Next

Close SAVE

Add Expense types

An expense type 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 e.t.c

- From the menu then click on **Expense** then select **Expense type**
- Click on **New type**
- Enter the name and description
- Click **Add to list** then click **Save**

To Delete an Expense Type

- From the menu then click on **Expense** then select **Expense Type**

- Click on the Delete icon of the particular expense type

Expense Classes
Home / Expense Classes

Expense Class List
New Class

Show 10 entries
Search

S/N	NAME	DESCRIPTION	
1	Transport Expenses	All transport expenses for the business	
2	Refreshment		
3	Fueling		

New Expense Class

Expense Class
Descriptions

ADD TO LIST

S/N	NAME	DESCRIPTION
-----	------	-------------

Close
SAVE

Setting up your Business Budget

- Select Budget from the main menu, click on New Budget

Budget List

New Budget

Show 10 entries
Search

NAME	PERIOD	DURATION	YEAR	BUDGET AMT	MILESTONE	MILESTONE AMT	MANAGE
SALES	Jan - May	5 Months	2019	1,000,000.00	MONTHLY	200,000.00	
SALES	Aug - Dec	5 Months	2019	1,200,000.00	MONTHLY	240,000.00	

Showing 1 to 2 of 2 entries
Previous 1 Next

*** To create a new budget click on New Budget**

***Click on the Manage icon to view budget details or delete your budget**

- Select the budget type (sales or expense budget)
- When creating an expense budget, select the expense class
- Set the duration, select the budget year, enter total budget amount expected within the set duration
- Click on Save

Sales Budget Set-up

New Budget ×

Budget Type

SALES

From

September

To

December

For Year

2019

Total Budget Amount

2000000

Close

SAVE

Expense Budget Set-up

New Budget ×

Budget Type

EXPENSE

Expense Class

Electricity

From

September

To

December

For Year

2019

Total Budget Amount

50000

Close

SAVE

RECORDING TRANSACTIONS

Record a Sales Transaction & Generate a Sales Invoice

- From the main menu, click on Sales & Customer, select New Sale & Quotation

Date

Transaction Class

Customers

Payment Type

Transaction Type

2019-Sep-13

Select Transaction Clas

Adeyinka

Cash

SALES

Items

+ Add Item

Show

10

 entries

Search:

S/N	ITEM NAME	QUANTITY	RATE	SUB TOTAL	TAX	TOTAL	
1	HP laptops 1	2	60,000.00	120,000.00	6,000.00	126,000.00	<div></div>

Showing 1 to 1 of 1 entries

Previous1Next

Amount	120000	Discount	0	Discount %	0
Net Amount	120000	Tax Amount	6000	Total Amount	126000
Amount Received	0	Balance	126000	Change	0

✖ Clear

✔ Save

📄 Save and Generate Invoice

⬆

- Enter your Date of Transaction, select Transaction class (**if the transaction class is not activated, then do not select**)
- Customer, Payment type and Transaction type
- Click the **Add Item** button to select the item, apply tax and enter the quantity to be sold > Click **Add Item**

Add New Items

Items	Available Qty.	Quantity	Sales Rate
HP laptops 1	95	2	60000

<input checked="" type="checkbox"/> Apply Tax	Amount	Tax Amount	Total Amount
	120000	6000	126000

Close ADD ITEM

- Apply a discount in % as this populates the discount amount
- Enter the amount received from the customer.
- Click on **Save or Save and Generate Invoice** (This creates a preview of the invoice, click on print to download a pdf format) or click **Clear** to erase a previous entry

To view or delete a sales invoice already recorded

- From the main menu, click on Sales & Customer
- Select Sales & Quotation List
- Click on the **manage icon** to view sales details or delete a previously recorded sale invoice.

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.

Sales

Home / Sales

Sales List

Show 10 entries

Search:

DATE	CUSTOMER NAME	CURRENCY	AMOUNT	MANAGE
01-Dec-2018	Vikky	NAIRA	6,500.00	
03-Dec-2018	Cash	NAIRA	2,000.00	
03-Dec-2018	Chief Williams	NAIRA	150,000.00	
03-Dec-2018	Chief Williams	NAIRA	150,000.00	
03-Dec-2018	Grace	NAIRA	15,000.00	
03-Dec-2018	Togin	NAIRA	50,000.00	

*To record a sale transaction click on **Make a Sale**

*Click on the **manage icon** to view sales details or delete a sale

Pdf Copy

SALES INVOICE



INVOICE DATE
August 15, 2019
INVOICE NO.
33333

Foody
lb

oluwatoyingisanrin@gmail.com
2223

Deola

ddy@gmail.com

PRODUCT	QTY	UNIT	AMOUNT	TAX
Books	2	3000	6000	0
Total Amount			6,000.00	
Discount			0.00	
Sub-Total			6,000.00	
Tax			0.00	
Amount Paid			6,000.00	
Balance			0.00	

Thank you very much for doing business with us. We look forward to working with you again!

Generate a Sales Quotation

- From the main menu, click on Sales & Customer, select New Sale & Quotation
- Click on **Make a Sale**
- Enter select your Date of Transaction, Customer, Payment type and select **Quotation** as the Transaction type
- Click the **Add Item** button to select the item, apply tax and enter the quantity to be sold
- Click on **Save** or **Save and Generate Quotation** (This creates a preview of the invoice, click on print to download a pdf format) or click **Clear** to erase the sale details

To convert a Sales Quotation to a Sales Invoice

- From the main menu, click on Sales & Customer
- Select Sales & Quotation List & Click on the **Quotation** Tab
- Click on the **manage icon**, and select **convert to invoice**
- Make any adjustment and save

To view or delete a sales quotation already recorded

- From the main menu, click on Sales & Customer
- Select Sales & Quotation List & Click on the **Quotation** Tab
- Click on the **manage icon** to view sales details or delete a previously recorded sale quotation.

Recording Purchase and Stock Adjustment

- Click on **Items & Purchases > Purchase List**
- Click on **Purchase & Adjustment**

Purchase/Stock Adjustment

Date: 2019-Mar-06 Items: Shingle Brown Bark Type: PURCHASE

Available Qty: 100 Sales Rate: 1250 Purchase Rate: 1100 Quantity: 10

Vendors: Idumota Payment Type: Select Items Amount: 11000 Paid Amount: 5000

Close SAVE

* Select the date, item, and movement type.

*Add the quantity purchased or adjusted.

* Select the vendor, payment type and the enter the amount paid (Note for adjustment you will not be required to enter the vendor, payment & amount paid .

*Click save

Recording Business Expenses

After creating all your expense types, you now to proceed to record all your incurred expenses.

- Click on **Expense** from the menu
- Select **Expense**, then click on a new expense
- Select Expenses
- Select the expense type, transaction class (if any), enter the bill amount & description of the expense
- Select the vendor, payment type and enter amount paid
- Click **Add to list** then click **Save**

New Expense

2019-Sep-17

General Class

Refreshment

2000

Descriptions

Vendors

Payment Type


Amount Paid

KGLlr

Cash

2000

ADD TO LIST

NAME	DESCRIPTION	AMOUNT	VENDOR	PAYMENT TYPE	PAID	
Refreshment	Refreshment	2000	KGLlr	Cash	2000	

Showing 1 to 1 of 1 entries

Previous1Next

CloseSAVE

To Delete a Recorded Expense

- From the menu then click on **Expense** then select **Expense**
- Click on the Delete icon of the particular expense type

USER MANAGEMENT

Create a new user

- Click on **User Management** from the main menu
- Select New User
- Enter user details

New User

First Name	Last Name	Email	Password
<input type="text" value="Bisi"/>	<input type="text" value="Tade"/>	<input type="text" value="tadebis@gmail.com"/>	<input type="password" value="*****"/>

- Assign user permission and **Save**

User Permissions

Dashboard	Customers	Items	Purchase List	Sales	Expenses	Expenses Classes	Budgets
<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View	<input type="checkbox"/> View	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> View
	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Add	<input type="checkbox"/> Purchase & Adjustment	<input type="checkbox"/> Add	<input type="checkbox"/> Add	<input type="checkbox"/> Delete	<input checked="" type="checkbox"/> View Transactions
	<input type="checkbox"/> Edit	<input type="checkbox"/> Edit		<input type="checkbox"/> Delete			<input type="checkbox"/> Add
	<input type="checkbox"/> Delete	<input type="checkbox"/> Delete		Quotation			<input type="checkbox"/> Delete
				<input type="checkbox"/> Convert To Invoice			
				<input type="checkbox"/> Delete			
Receipts							
<input checked="" type="checkbox"/> View							

After creating a user, you need to activate the user

- Click on **User Management** from the main menu
- Select **user list**

Users List New User

Show 10 entries

Search:

S/N	NAME	EMAIL	STATUS	MANAGE	EDIT
1	ff o	oluwatoyingisanrin@gmail.com	Active	ADMIN ACCOUNT	
2	Bs Gab	bs@gmail.com	In-Active	activate	Edit
3	Bisi Tade	tadebis@gmail.com	In-Active	activate	Edit

Showing 1 to 3 of 3 entries

Previous

1

Next

- Then click on **activate**

To edit a user's detail

- Click on **User Management** from the main menu
- Select **user list**
- Click on **edit**
- Make your changes and save

To edit an Admin detail

- Click on **User Management** from the main menu
- Select **Admin**
- Make your changes and save

Edit Admin User

First Name

Prestige

Last Name

School

Email

prestiges@gmail.com

Password

Confirm Password

Save

BUSINESS REPORTS

To access the report below, click on reports from the main menu

Profit & Loss Report- This shows the profitability of your business within a defined time range

Sales Report - this shows all the sales recorded within a defined 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 defined time range.

Tax Report - this shows all taxes charged on sales invoices within a defined time range.

Customer Follow Up Report - this shows the buying patterns of customers that are yet to patronize your business.

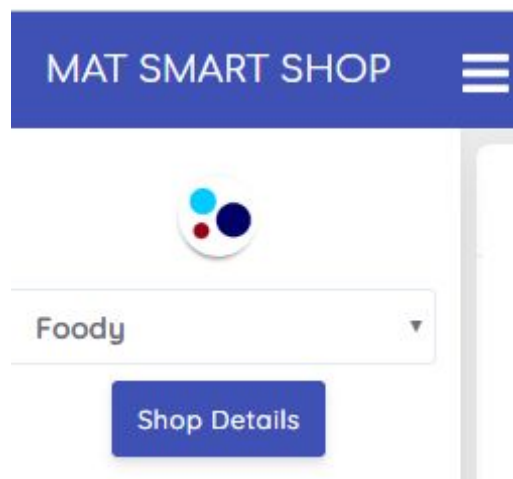
Receipt Report -- this shows total of payment received from customers within a defined time range.

OTHER FUNCTIONS

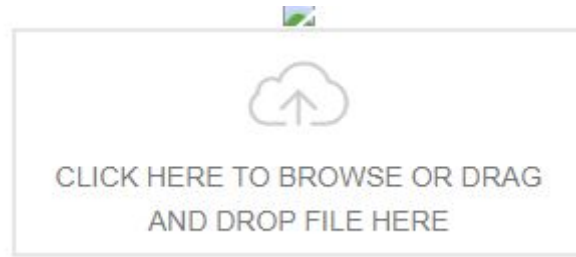
Upload of Business logo

To upload your business logo, follow the steps below

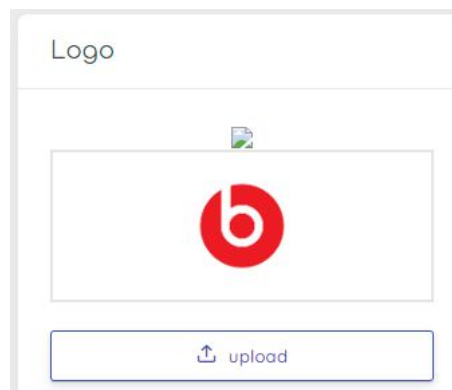
- Click on Shop Details to view your business profile



- Pick your logo file (PNG Format)



- Click on Upload



Edit your Profile Details

- Click on **Shop Details** to view your business profile, then click **Edit Store**

Store Details

[Edit Store](#)

Store Id: **23452**

Name: **Foody**

Address: **Ib**

Email: **Oluwatoyingisanrin@Gmail.Com**

Phone: **2223**

State: **Ib**

Country: **Nigeria**

- Make your changes and save

Company Name

Phone Number

Website

Address

Country

State

Currency

Tax Rate

[SAVE](#)

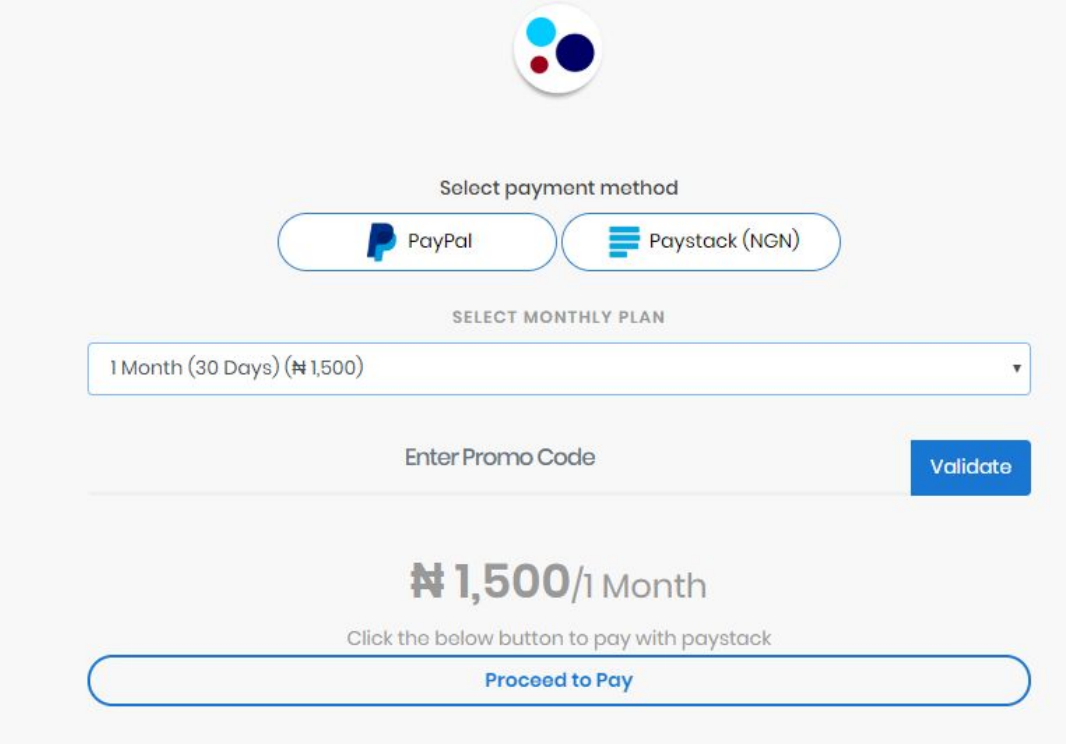
How to Renew your Subscription

- Click on **Shop Details** to view your business profile, then click **renew subscription**

Subscriptions

[Renew Subscription](#)

- Use Paystack for Naira payment or use Paypal for USD payment
- Select your payment plan
- Enter promo code (If any) and click Validate to apply the code
- Click on Proceed to pay



The image shows a payment interface for MatSmartShop. At the top is a circular logo with three colored dots (blue, red, and dark blue). Below the logo, the text "Select payment method" is displayed. There are two buttons: "PayPal" with the PayPal logo and "Paystack (NGN)" with the Paystack logo. Below these buttons, the text "SELECT MONTHLY PLAN" is displayed. There is a dropdown menu showing "1 Month (30 Days) (₦1,500)". Below the dropdown menu, the text "Enter Promo Code" is displayed, followed by a "Validate" button. Below the "Validate" button, the text "₦1,500/1 Month" is displayed. Below this, the text "Click the below button to pay with paystack" is displayed, followed by a "Proceed to Pay" button.

- Enter your card details and click on Pay

The screenshot shows a payment interface. On the left, under 'PAY WITH', there are four options: Card (highlighted in green), Bank, GTB 737, and Visa QR. The main area shows a user profile for 'oluwatoyingisanrin@gma...' with a balance of 'Pay NGN 1,500'. Below this, it says 'Enter your card details to pay'. There are three input fields: 'CARD NUMBER' with the value '0000 0000 0000 0000', 'CARD EXPIRY' with the value 'MM / YY', and 'CVV' with the value '123'. A 'HELP?' link is next to the CVV field. At the bottom, there is a large green button labeled 'Pay NGN 1,500'.

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 **User Management** from the main menu
- Select **Admin**
- Change the password and save

Invoice Customization

You can change the title of the sales invoice and input your own invoice message

- Click on Shop Details
- Change the Invoice Title and Invoice Message
- Save

Settings

Invoice Title

SALES INVOICE

Invoice Message

Thank you very much for doing business with us. We
look forward to working with you again!

☐ Activate Transaction Class

Save