MAT SMART SHOP

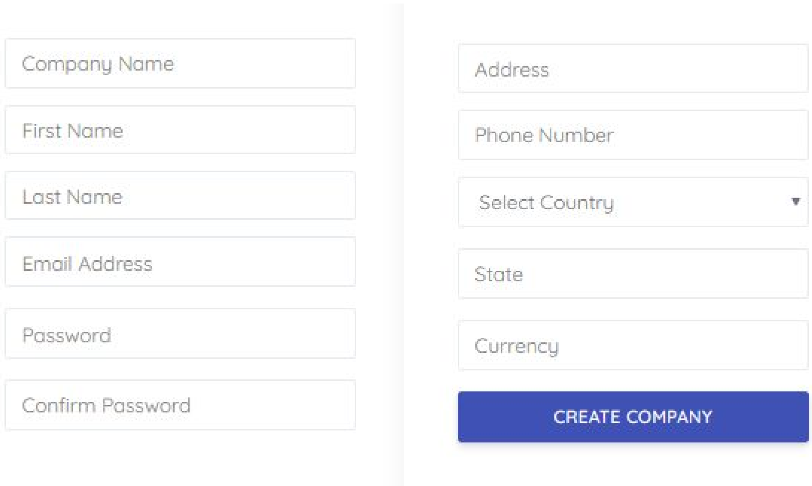
(WEB VERSION)

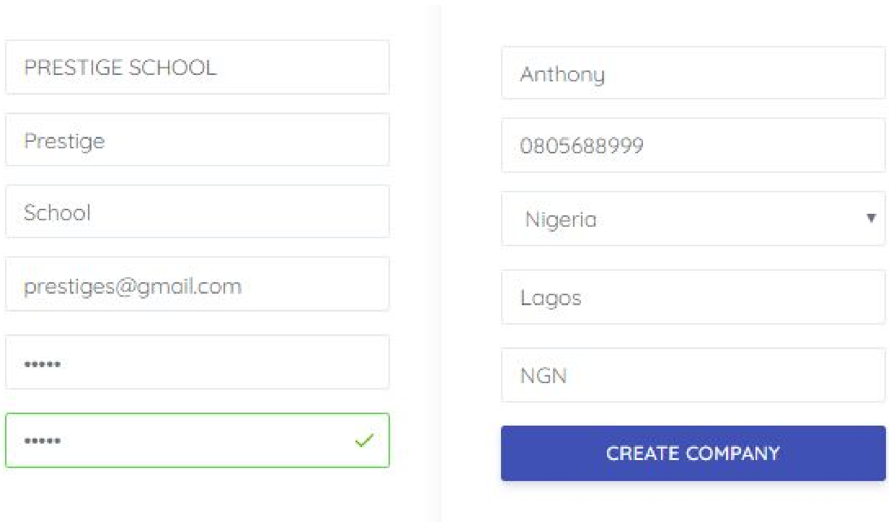
User Guide

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



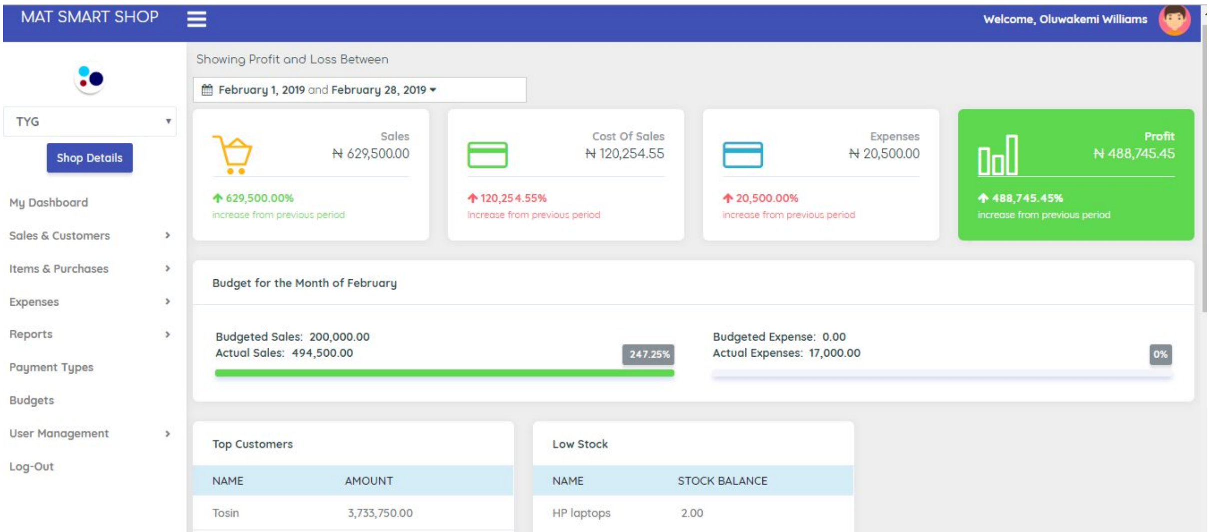


- Click on Create Company
- Subscribe immediately or use the trial period

THE DASHBOARD

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

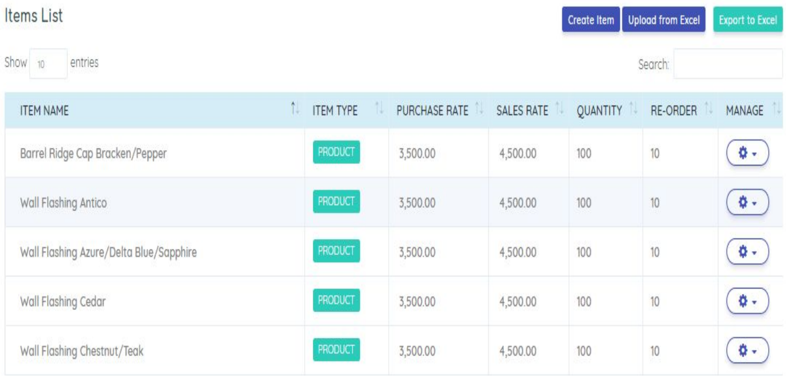
- Income & Expense
- Low stock levels
- Customer & Vendor Balance.
- Top Customers
- Budgeted Sales Progress
- Customer Anniversary Reminder



SETTING UP

Add New Items

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



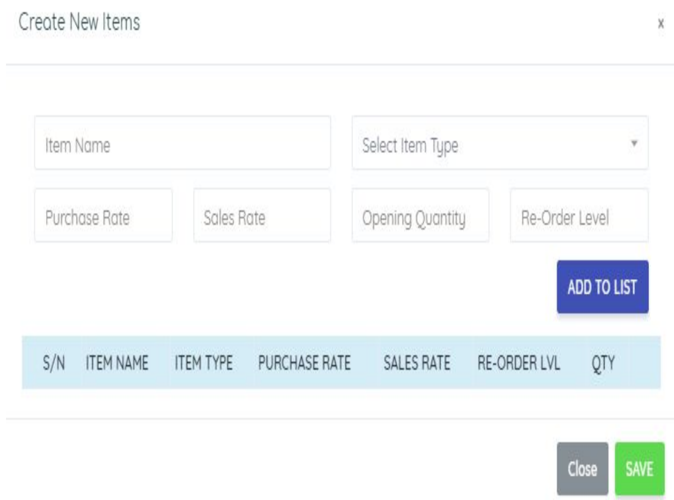
* To add new items click on **Create Item** or **Upload from Excel**

*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.



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

- Download the sample template .

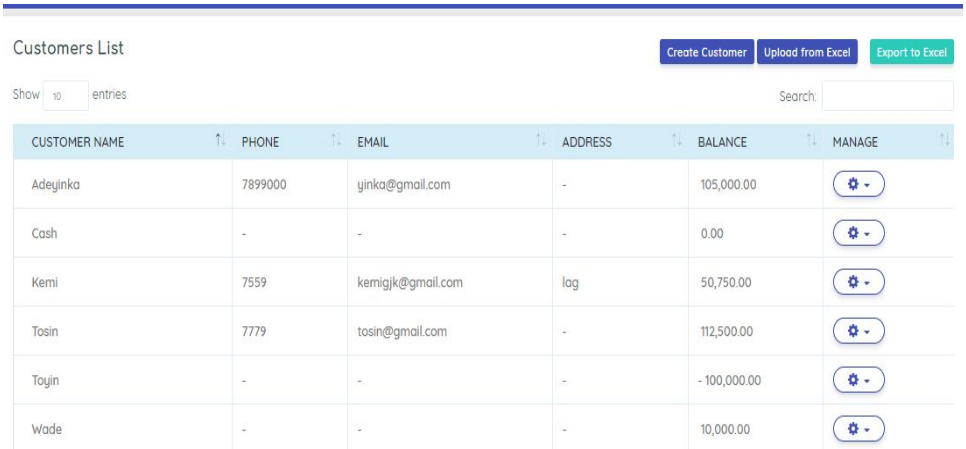
- Open a new excel sheet and enter your details as shown in the sample template.
- Upload the excel file.

- Click on import data

- Finally click on save

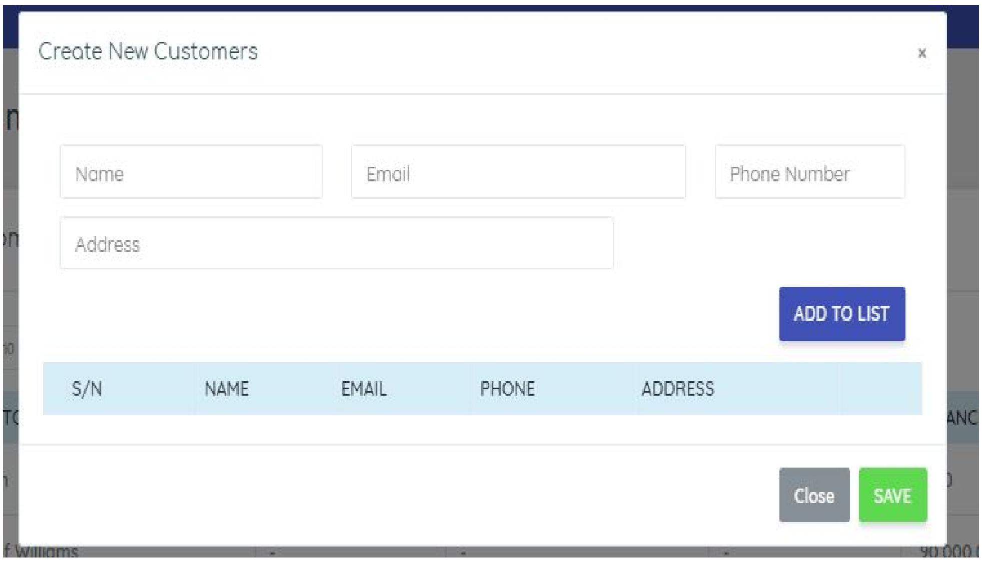
Add a New customer

- 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.



*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.



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

- Download the sample template and fill in the necessary details

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

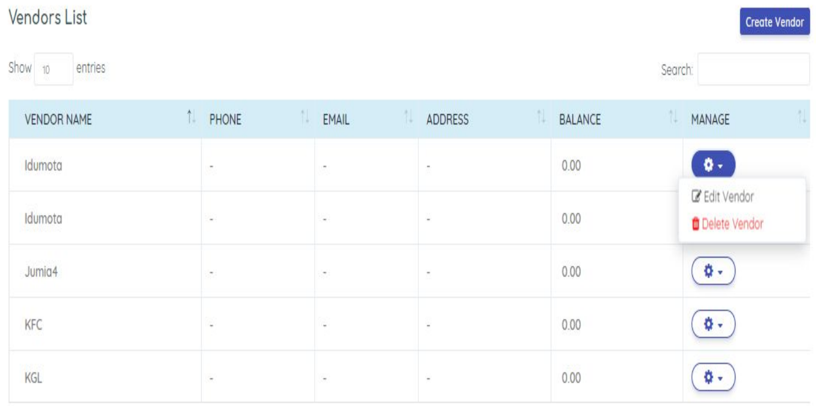
- Upload the excel file

- Click on import data

- Finally, click on 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.



*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.

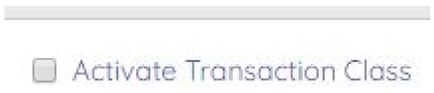
Businesses with different departments or locations can use classes to get profitability for each department/location.

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.

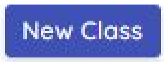
Transaction Class tracking helps you get an excellent overview of your company expenses and can see how your money is being spent. With this information, it's much easier to stay on top of your budget.

This feature needs to be activated

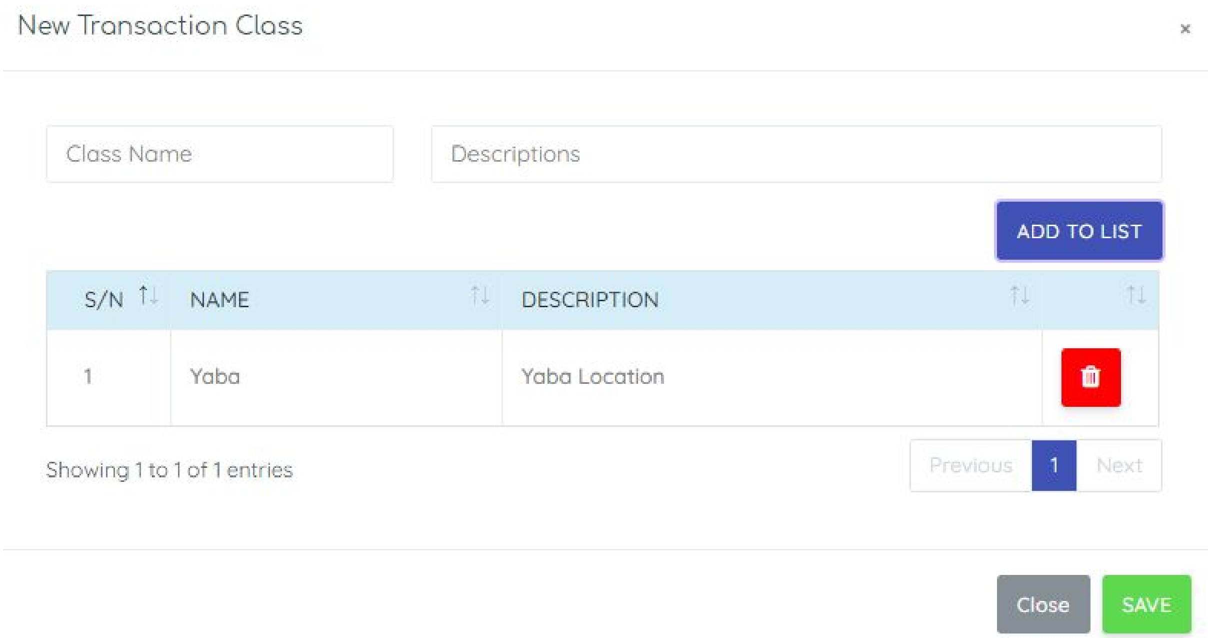
- Select Transaction class from the main menu
- Check the Activate Class Box



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



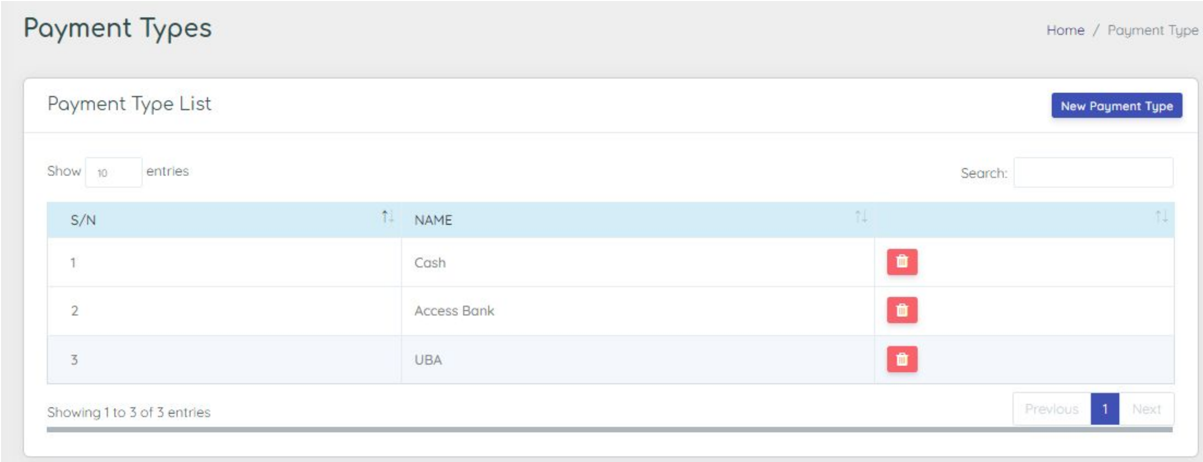
- Enter the name and description
- Click **Add to list** then click **Save**



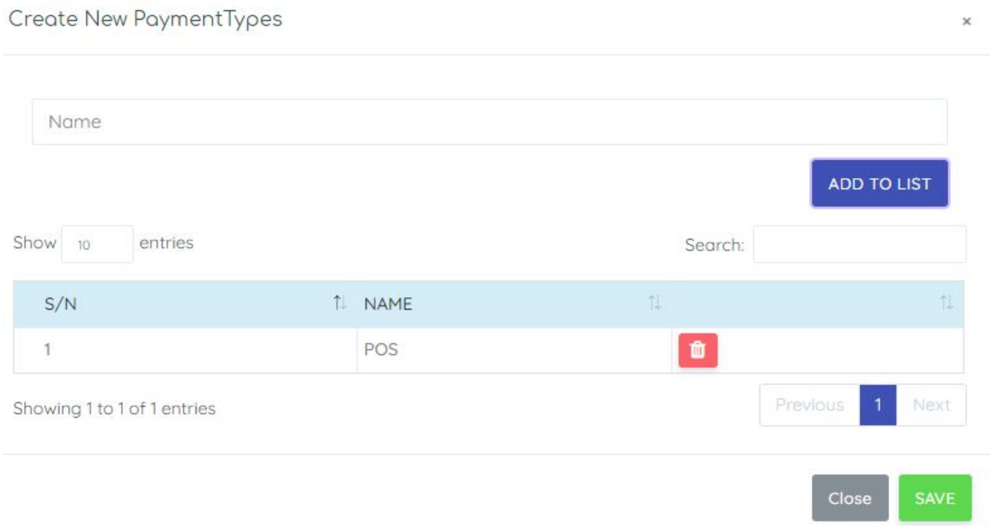
Add new payment types

Payment types are your bank accounts and petty cash.

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



- Enter the name and save



Add Expense types

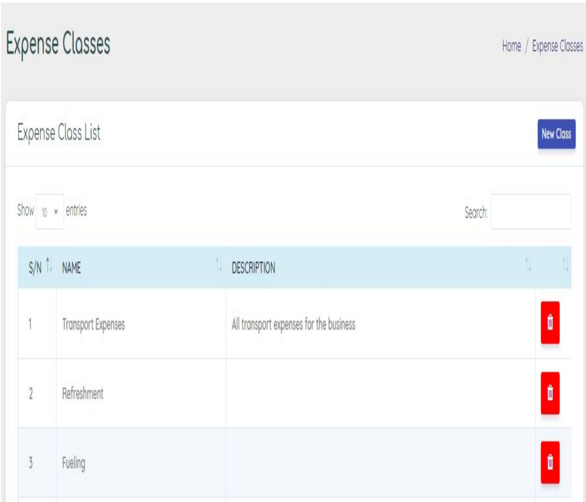
An expense type is used to list out all the expenses that your business incurs. Examples of expense class include salaries, security fee, electricity, transportation, cleaning fee, generator repairs, laptop repair, and generator fuelling e.t.c

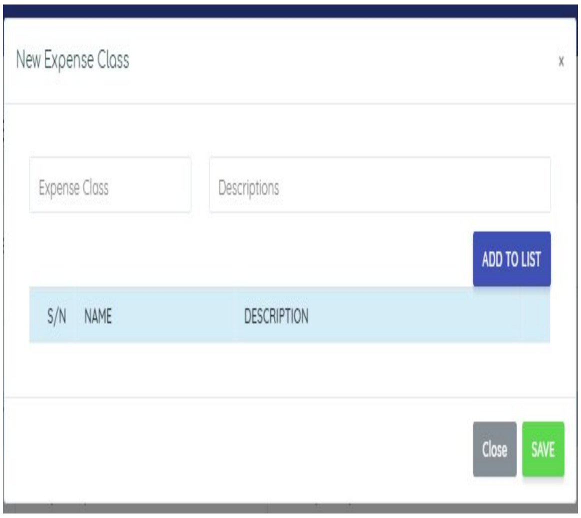
- From the menu then click on **Expense** then select **Expense type**
- Click on **New type**
- Enter the name and description
- Click **Add to list** then click **Save**

To Delete an Expense Type

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

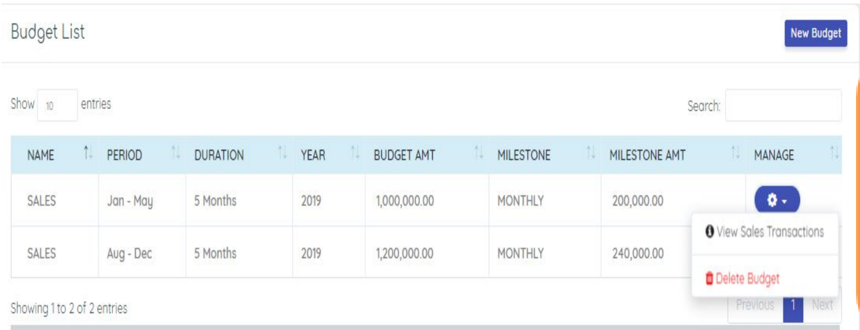
- Click on the Delete icon of the particular expense type





Setting up your Business Budget

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

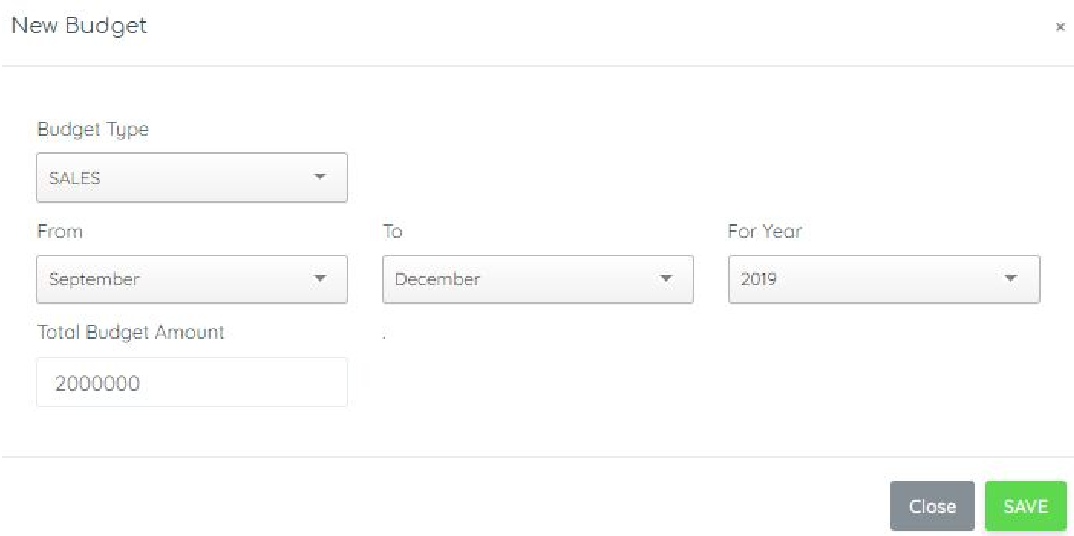


* To create a new budget click on **New Budget**

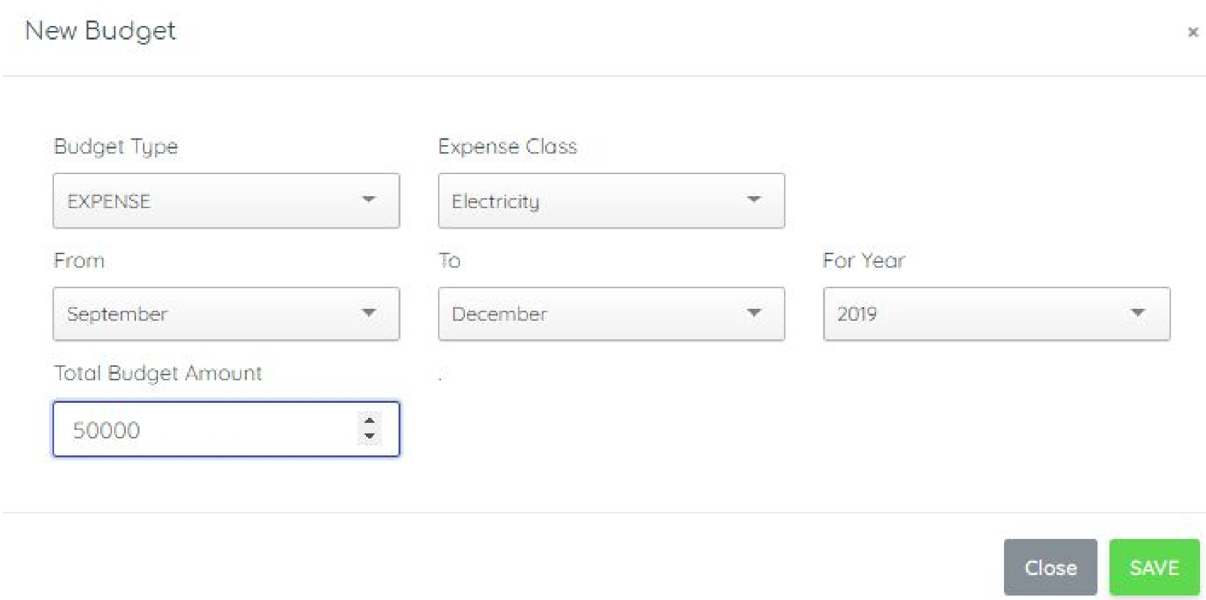
*Click on the Manage icon to view budget details or delete your budget

- 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



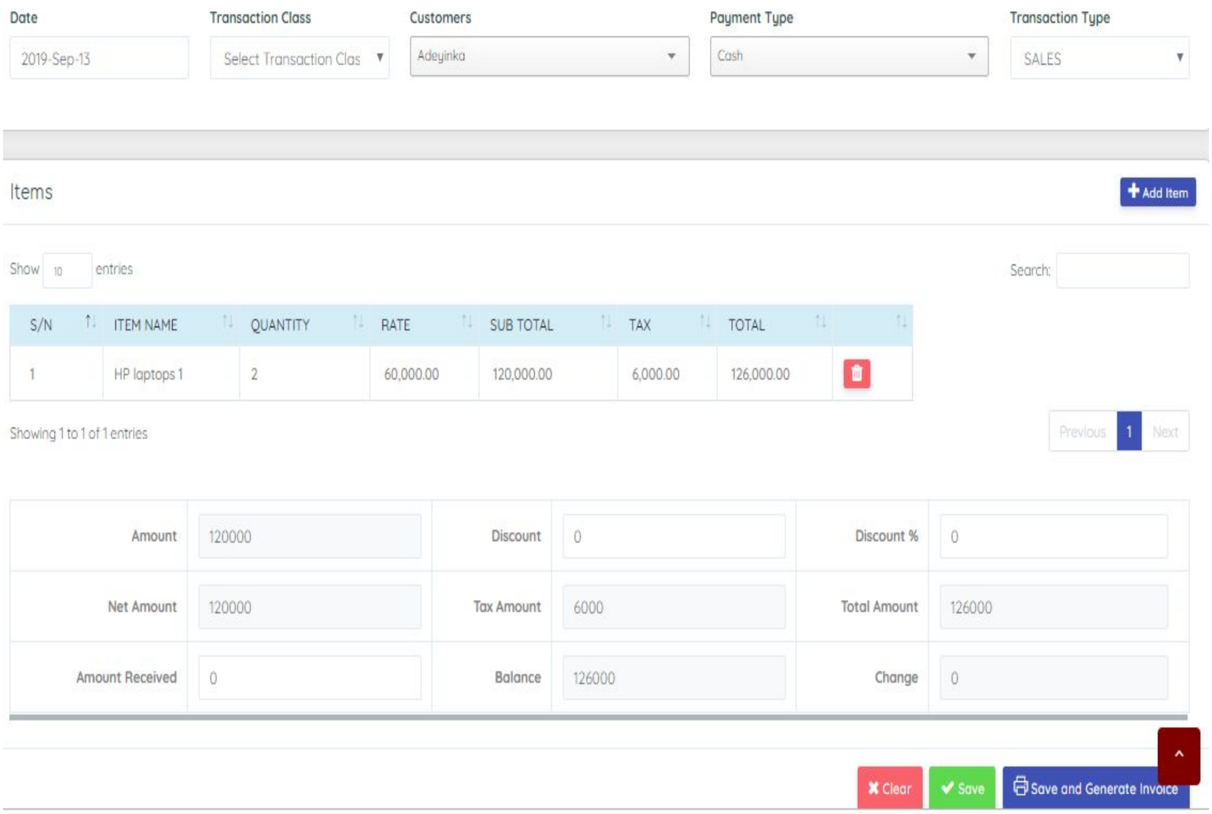
Expense Budget Set-up



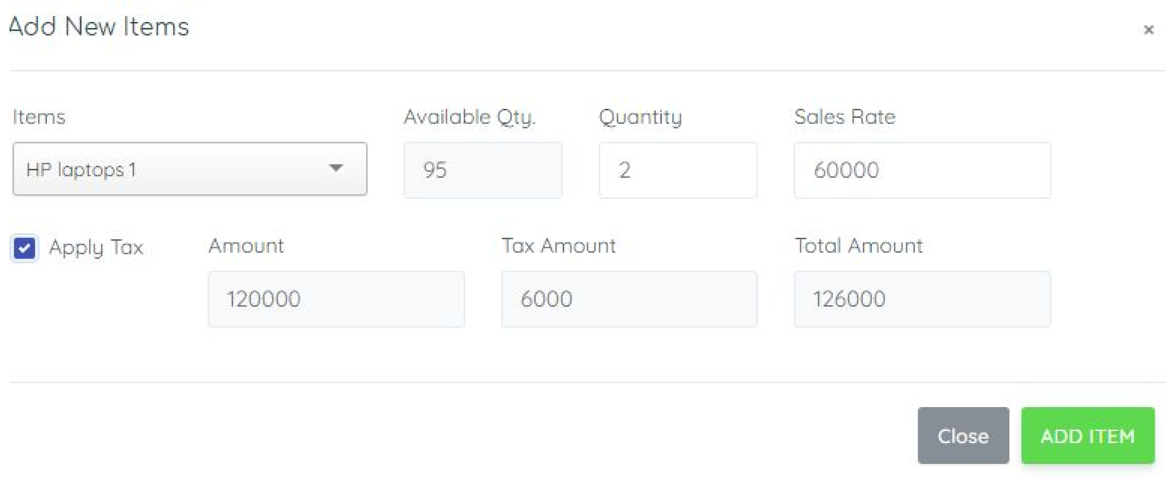
RECORDING TRANSACTIONS

Record a Sales Transaction & Generate a Sales Invoice

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



- 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**

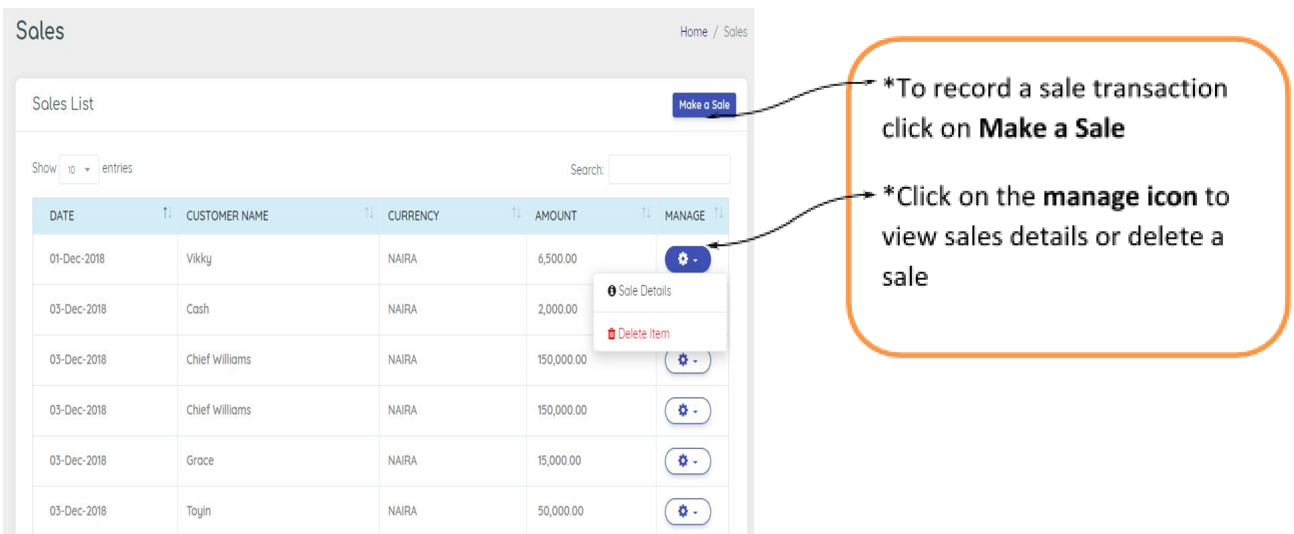


- Apply a discount in % as this populates the discount amount
- Enter the amount received from the customer.
- Click on **Save or Save and Generate Invoice** (This creates a preview of the invoice, click on print to download a pdf format) or click **Clear** to erase a previous entry

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.



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SALES INVOICE

INVOICE DATE
August 15, 2019
INVOICE NO.
33333

Foody
Ib

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

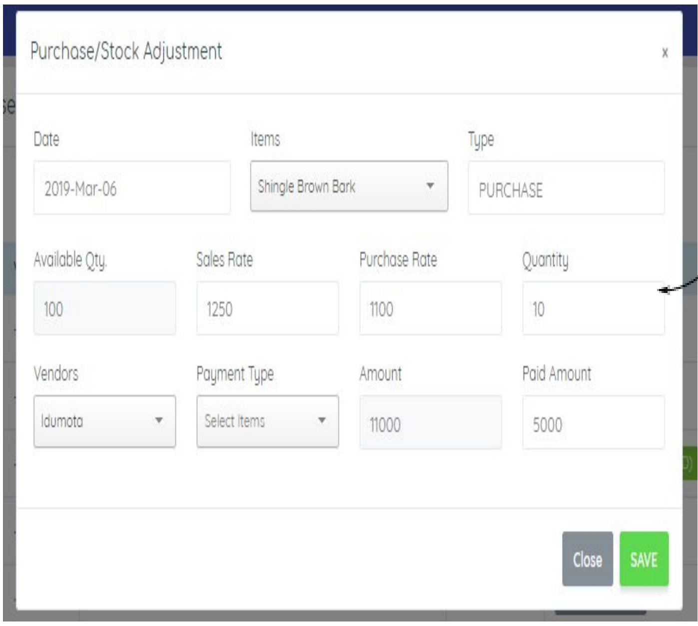
- From the main menu, click on Sales & Customer
- Select Sales & Quotation List & Click on the **Quotation** Tab
- Click on the **manage icon**, and select **convert to invoice**
- Make any adjustment and save

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**



* Select the date, item, and movement type.

*Add the quantity purchased or adjusted.

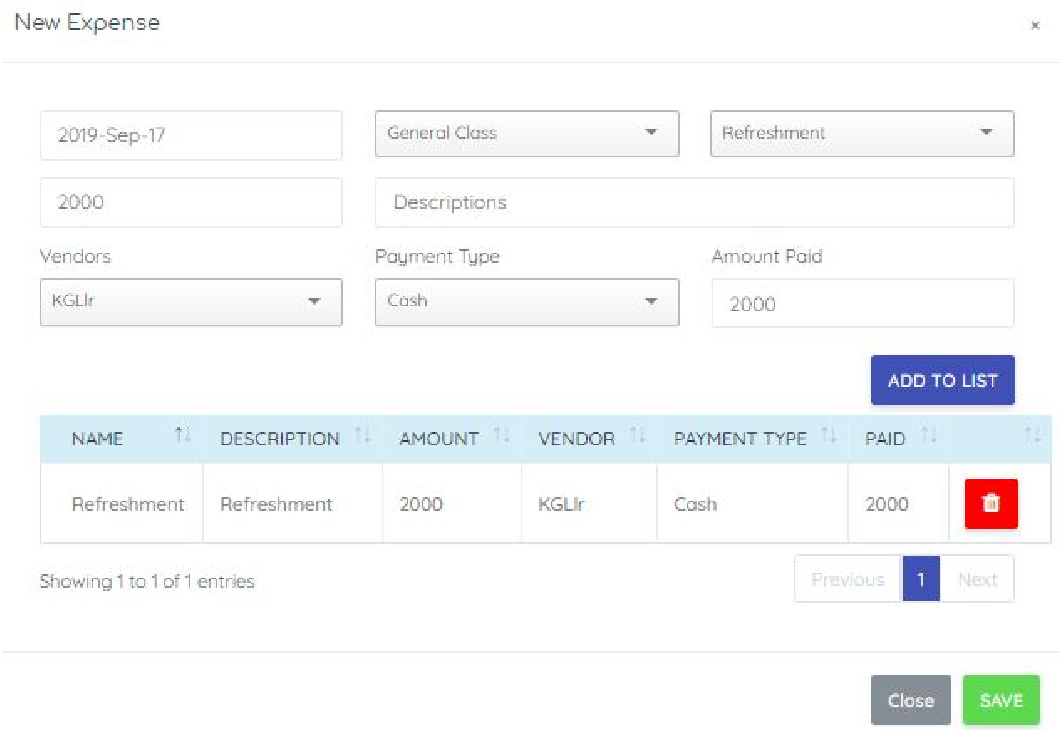
* Select the vendor, payment type and the enter the amount paid (Note for adjustment you will not be required to enter the vendor, payment & amount paid .

*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**



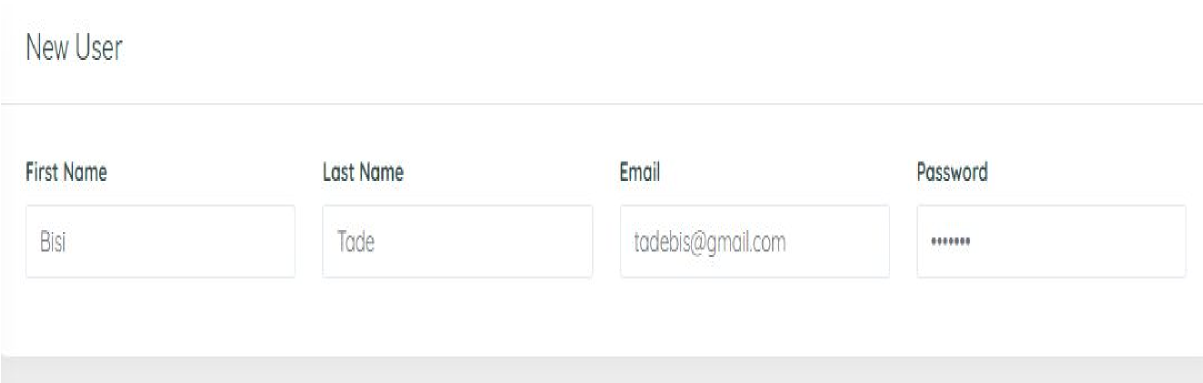
To Delete a Recorded Expense

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

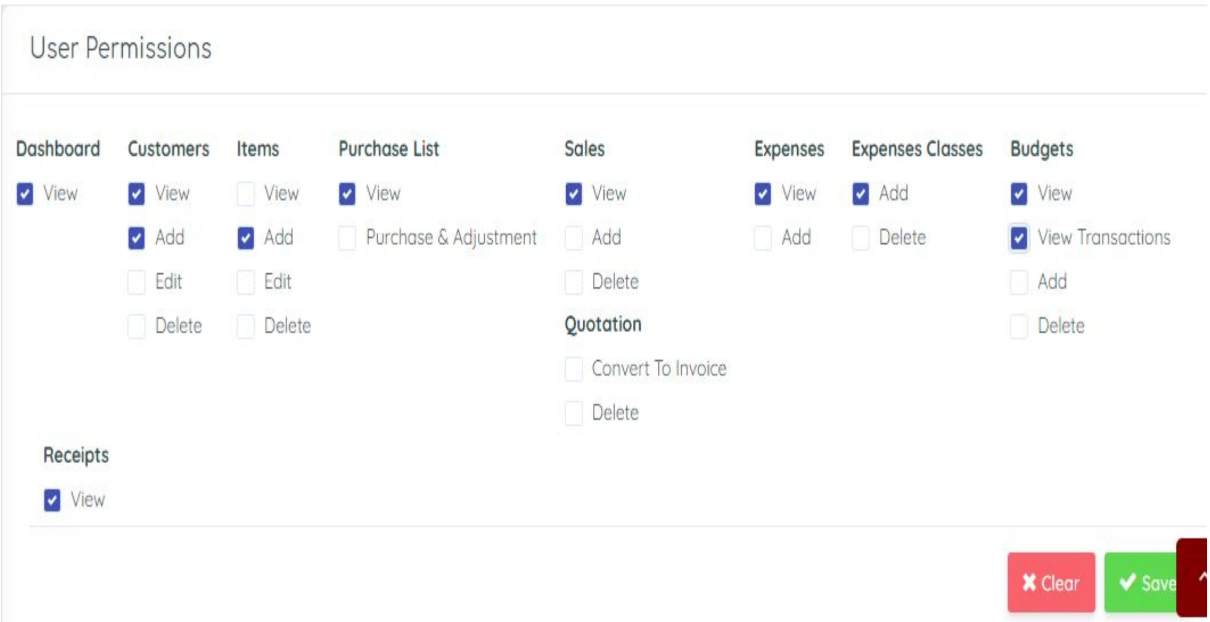
USER MANAGEMENT

Create a new user

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

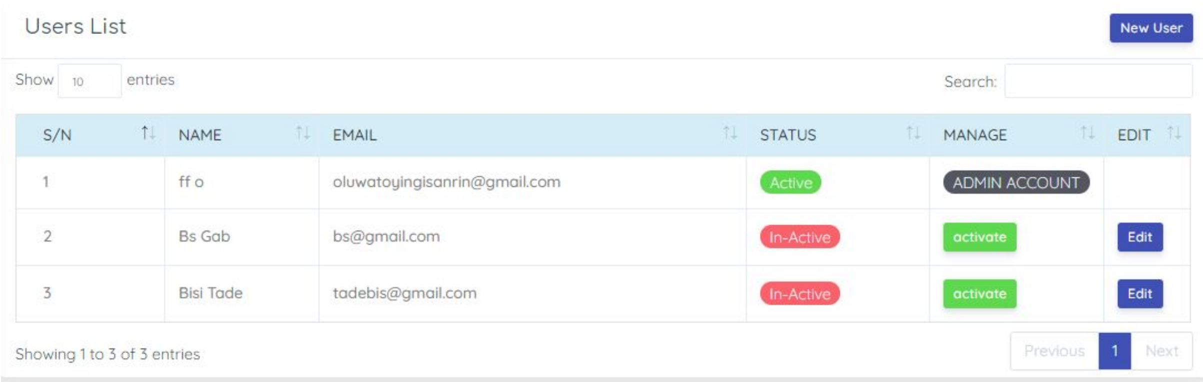


- Assign user permission and **Save**



After creating a user, you need to activate the user

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



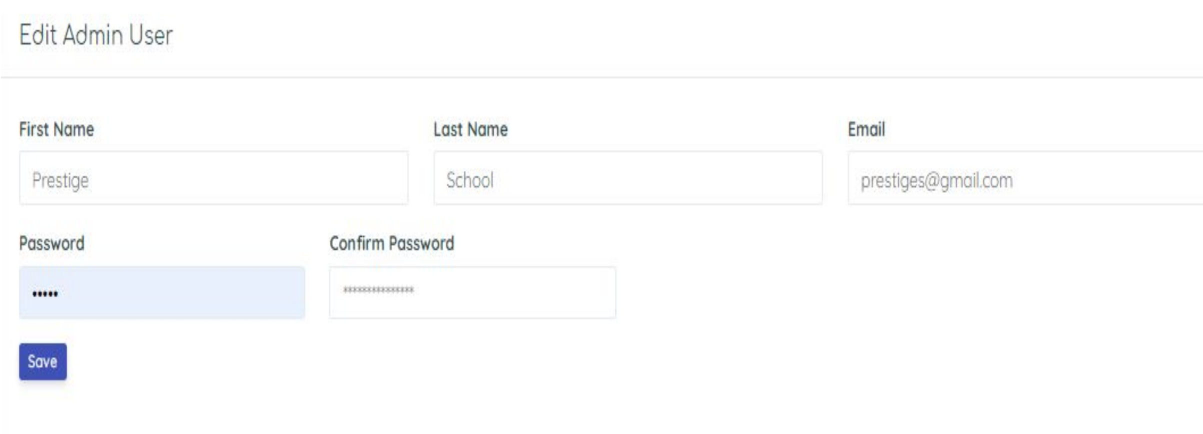
- Then click on **activate**

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



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.

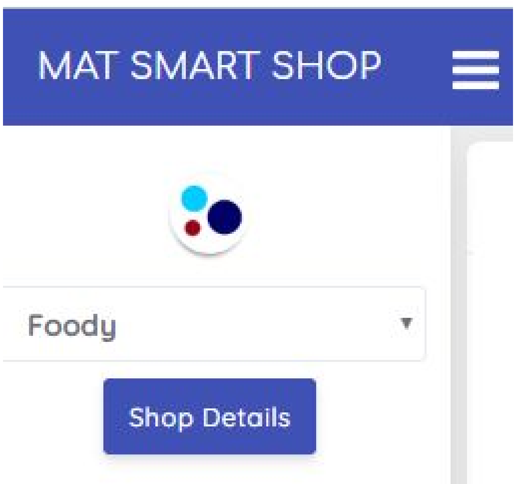
Receipt Report -- this shows total of payment received from customers within a defined time range.

OTHER FUNCTIONS

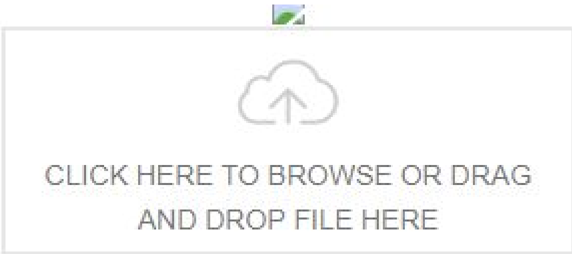
Upload of Business logo

To upload your business logo, follow the steps below

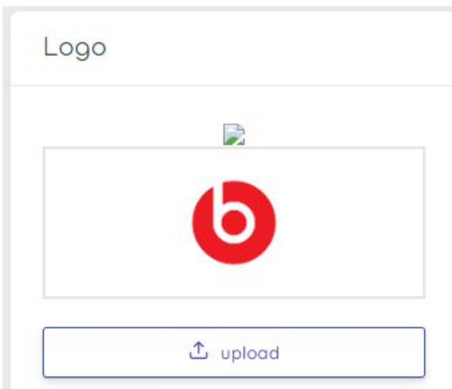
- Click on Shop Details to view your business profile



- Pick your logo file (PNG Format)

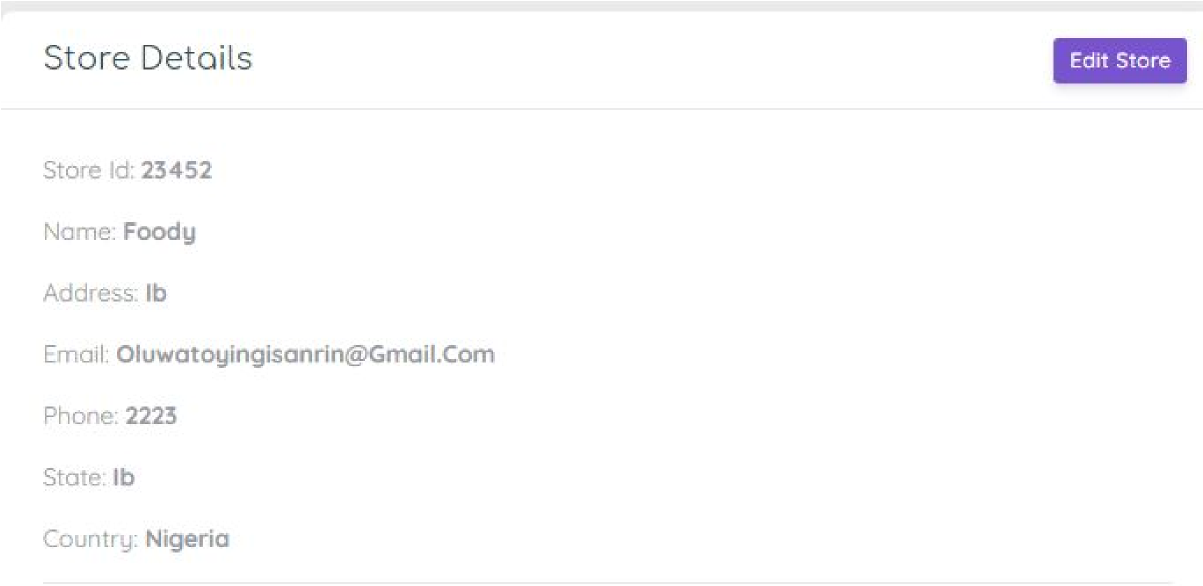


- Click on Upload

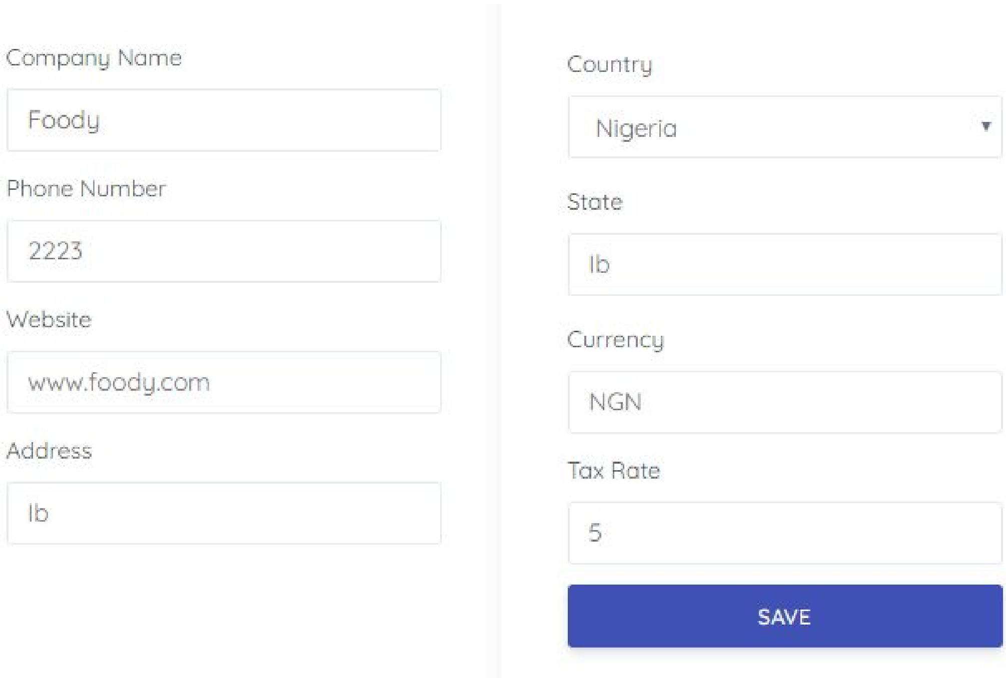


Edit your Profile Details

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



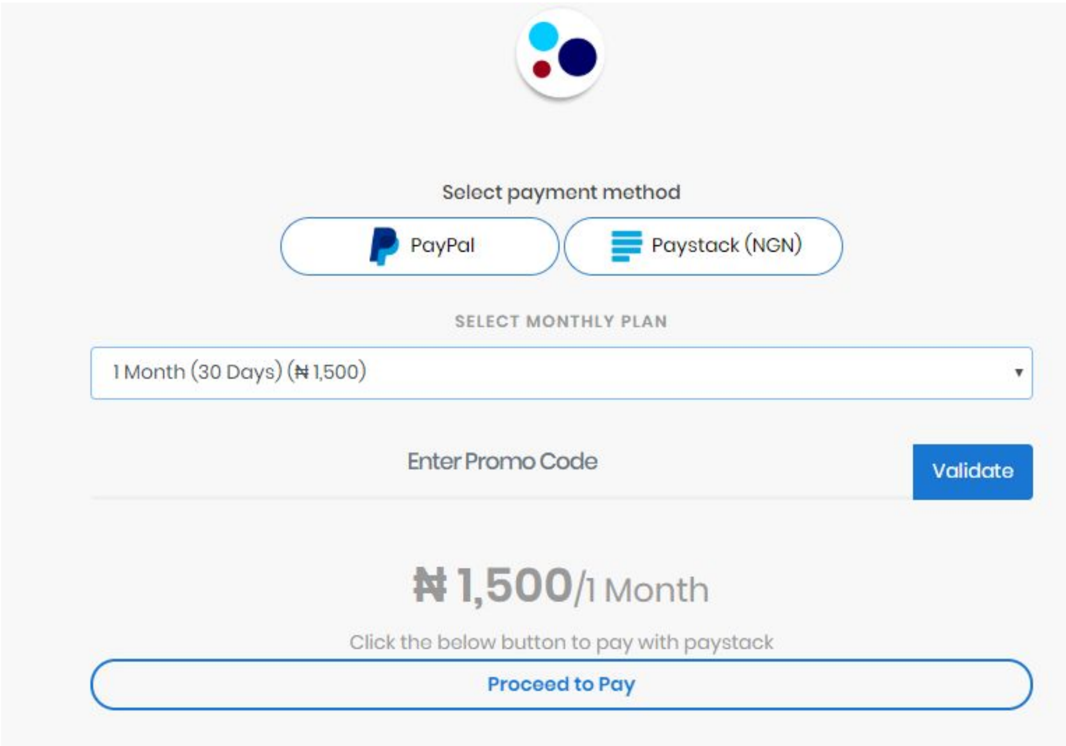
- Make your changes and save



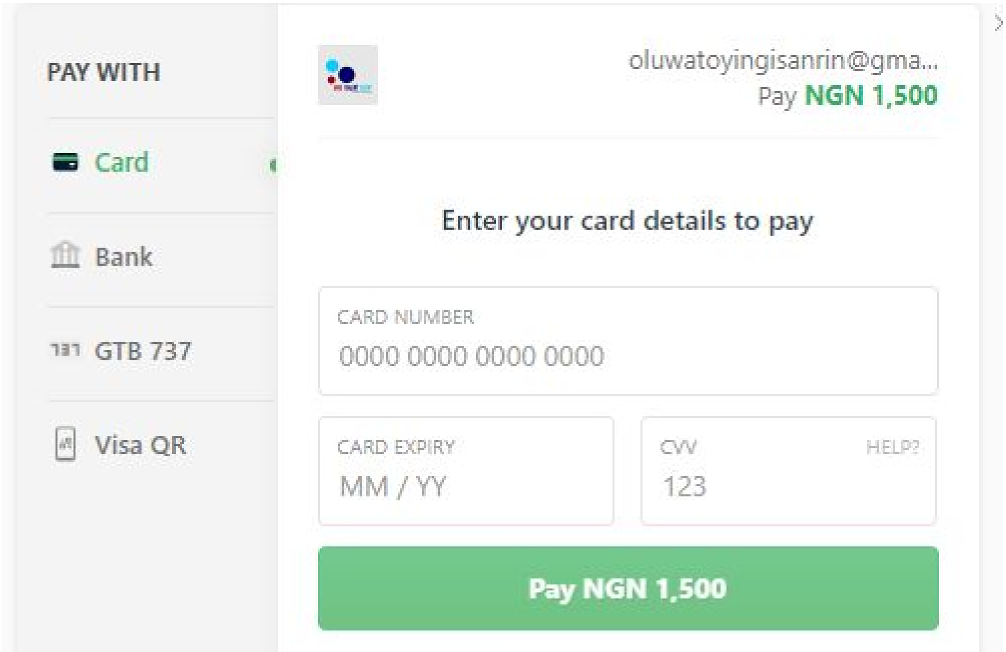
How to Renew your Subscription

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



- Enter your card details and click on Pay



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