



## TUTORIAL ON SALECENTRA

### TO GET STARTED:

1. Log in to the website via: <https://www.salecentra.com/>
2. **Click on Login** to sign in as an existing user, or **Create Account** to sign up for new users
3. On this page, you will find the **Login, Sign-up, and Sales Entry Login** to proceed with a specific task. As a New User, click on **Sign-up** to continue.
4. Fill in your **Business Information** in the spaces provided below the **Create your Business Account**.  
*The specific information required here are **Business Name** (e.g. Osas Clothing, Suzzy's Delight, Emeka Building Materials Shop, e.t.c.), **Contact Person** (Your name), **Phone number, Business Address, Industry** (Food, Clothing, e.t.c.), **Country, email, password, and confirm password**.*
5. After confirming the information entered, **click** on the **Create Account** button at the bottom, and an **Account Created Successfully** message will be displayed on the screen. You will also immediately receive a **Welcome to SaleCentra** email alert confirming your registration and validating the email of the registered **Business Account**.
6. Next, **click** on **Proceed to login** button at the bottom of the page to continue to login your newly registered account. **Enter** your **Business Email** (the email you provided during registration) and **password** and **click** on **login** to continue.
7. Next is the **3-steps onboarding process**.
  - i. *The **First step** requires you to **select the Currency** for transactions and **Upload** your **company logo** (this will appear on your receipts and invoices), then **click on next**.*
  - ii. *The **Second Step** shows where you can **Add your first product**, which includes sections like **Product name** (e.g. Green Prada Shoe Size-32, Big Bull Rice 25KG, 12mm Steel Rod, e.t.c.), **Cost Price, Selling Price, and Starting Stock** (which means number of each identical product in your stock), then **click** on **Add & Continue**.*
  - iii. *Thirdly, you will see a **You're all set** message showing a general outlook of your business settings and a button below directing you to **Go to Dashboard**.*
8. The **Business Dashboard** is where you can get a quick overview of your business performance and market indicators. This includes **Revenue vs Expenses (Last 30 Days), Low Stock Alerts, and Recent Activity** on your application like **Sales Trend** and **Top Five Selling items**. Unique features like **Live Exchange Rates display** and **Currency converter** can be accessed here.



9. The next step after being brought to the dashboard is to go to the **Choose Application Mode** on the left side of the window and select **Inventory Manager** from the list provided and start adding your products or items.

The **inventory manager** is a feature that consists of the following:

- i. **Add New Inventory item:** *Here you can **add** more products to your inventory, just like you did during the onboarding process but with the **addition of more details** to each of your product like **Category, Supplier, Shipping Cost, Other expenses, and Preferred Profit**. After entering this information, **click** on the **Add Item** button.*
  - ii. **Current Inventory:** *This feature only displays the **Current Inventory** of product you have in stock.*
  - iii. **Update Stock:** *This section offers flexibility to **Add Stock** and **Reduce Stock** on options presented. Then **click** on **Update stock** to apply change.*
  - iv. **Delete Inventory Item:** *Items can be **selected** and **deleted** using the **Delete Item** button displayed.*
  - v. **Export Inventory:** *Inventory can be exported by **clicking** on the **Download Inventory CSV**.*
  - vi. **Stock Movement History:** *This shows the **quantity stocks** and the **dates** they were taken.*
10. Next is the **Daily Sales Entry** application.
    - i. Under the **Record a Sale** section, **Click** on **choose** option to select an **Item Sold**, which then displays **Quantity Sold** and possible **Discounts**.
    - ii. Ensure the date matches on the **Sale Date**, then **click** on **Record Sale** to complete a transaction.
    - iii. The **Today's Sale** section shows all sales completed on a particular day.
  11. In the **Sales History** application, you can **View, filter, search, and export** your past sales records. This can help you generate and store exported sales record reports for future or external use by downloading the CSV file of your results.
  12. Next is the **Receipt** Application which helps you generate and download receipts for your customers in the following order:
    - i. *The **first part** deals on how to **Find a Sale** by searching through specific or a range of dates by **Items** or **Amounts**.*
    - ii. *In the **second** part, fill in the required **Customer Details** in the box provided such as **Customer Name** and **Phone Number**, and include an **Address** if provided.*
    - iii. ***Thirdly**, the **Generate Receipt** part allows you to **Select Sales** of items either as **single** or **multiple entry** according to specific **dates** from the options provided in the box.*





18. The **Debt Book** module enables you to **track** and **Record a Debt**. Choose the **Add Dept** tab and select the **They Owe Me** or **I Owe Them** option under **Type** and record the name of the **Customer/Supplier**, the **Amount** of money owed, the **Due date** repayment and a possible **Description** to identify the nature of debt. **Click** on **Record Debt** to register it.
19. The **Expenses** module refers to **Expense Tracker**, which helps you to track your business expenses to see where your money goes.
  - i. *The first tab is where you **Record an Expense** under **Category, Amount, Date, and Description**..*
  - ii. *The second tab is where you can **View Expenses** and **filter** it by **Category and Dates**.*
  - iii. *The third tab is just a **Summary** display of your **Total Expenses**.*
20. The **Business Settings** module will help you **setup and adjust** your **Business Profile**. Here you can **configure and reconfigure** your **Business Information** such as **Business Name, Business Address, Phone Number, Currency** (Optional); **Upload your Business Logo** to display your brand; **Change and Update password** when needed; and **create a Sales Entry Access**. At the end of the changes made, **Click** on **Save Settings** at the bottom of the change to complete the task.
21. The **Sales Entry Access** for your employee is a **single Free Login Access** to your business **Daily Sales Entry** module only. However, **you can Request for more Sales Entry Access as a Paid Service if you need more**. This **Sales Entry Access** contains minimal features to support **Sales records only**. To create this account follow the steps below:
  - i. *Go to the **Business Setting Module** and go to the **Sales Entry Access***
  - ii. *Click on **Enable Sales Entry Login***
  - iii. *Type in **Staff name**, e.g **Mary**.*
  - iv. *Type in **Create New Sales Entry Passcode, Confirm Sales Entry Passcode***
  - v. *Click on **Set/Change Sales Entry Passcode***
  - vi. *Click on **Save Setting** and you are done*