CodeFortify POS User Manual

A practical guide for everyday business work

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Contents

1. Welcome to CodeFortify POS

A simple guide to selling products, managing stock, and running your business.

What CodeFortify POS does

CodeFortify POS helps your business manage sales, products, stock, customers, purchases, payments, expenses, and reports from one place.

- Cashiers can serve customers and take payments.
- Inventory and purchasing staff can keep product quantities accurate.
- Managers and owners can review business activity and control access.

How this manual is organised

Use the menu on the left to move between parts of the system. The manual follows the same names used in the application.

Some screens are only available to people whose account has the required permission. The manual explains the screen even when your own role cannot open it.

- Getting Started and First Day Guide are for everyone.
- Sales and POS Terminal are most useful to cashiers.
- Catalogue, Inventory, and Purchasing are most useful to product and stock staff.
- Finance, Reports, and Administration are most useful to managers, owners, and accountants.

> **Important:** If a menu is missing, do not try to work around it. Ask an administrator to check your role and branch access.

2. Getting Started

Sign in, understand the Dashboard, and move safely around the application.

Sign in

Open the CodeFortify POS sign-in page. Enter your username or email and password, then select Sign in securely.

1. Enter your username or email.
2. Enter your password.
3. Select Sign in securely.
4. After a successful sign-in, the Dashboard opens.

> **Important:** Each employee should use their own account. Never share a password.

Forgot password

Select Forgot password? on the sign-in page and follow the instructions shown. Use the email address connected to your account. If your business does not have email recovery configured, contact an administrator.

1. Select Forgot password?
2. Enter the requested account information.
3. Open the password-reset message if one is sent.

4 Choose a new password and return to the sign-in page.

Sign out

Select your name in the top-right corner and choose Sign out. Sign out whenever you leave a shared computer or finish your shift.

Important: Signing out protects sales, customer information, and business settings from the next person using the computer.

Dashboard and navigation

The Dashboard gives a quick view of sales, purchases, stock, payments, expenses, customer dues, and recent activity for the selected period and branch scope.

- Use the branch selector to change the branch view when your account allows more than one branch.
- Use the sidebar to open Dashboard, Sales, Catalogue, Inventory, Purchasing, Customers, Finance, Reports, Administration, and User Manual.
- The top bar may show notifications for low stock and products close to expiry.
- Use the profile menu to open Business Settings or sign out.

3. User Types and Responsibilities

Your role decides which work you can see and perform.

Platform Super Admin

Controls the whole platform and all business areas. This is normally reserved for the person responsible for the complete system.

Business Owner and Business Administrator

Manage the business profile, branches, users, roles, settings, products, stock, finance, and reports. They should give other employees only the access needed for their work.

Branch Manager

Runs day-to-day branch operations, including sales, staff coordination, stock, purchases, registers, and branch reports.

Sales Manager and Cashier

Sales managers supervise selling and returns. Cashiers open a register, create sales, scan products, hold and resume sales, accept payments, and print receipts.

Inventory Manager

Checks quantities, batches, expiry dates, low-stock items, adjustments, and stock transfers.

Purchase Manager

Maintains suppliers, records purchases and receiving, and handles purchase returns.

Accountant

Reviews registers, expenses, customer collections, supplier payments, and financial reports.

Auditor and Viewer

Review information without receiving the same editing access as operational staff. An Auditor may also review activity records and export permitted reports.

Roles and permissions

A role is a group of permissions. Permissions decide what a user may view, create, change, approve, export, or close. Access can be limited to a business or branch.

- A cashier may create sales but not change business settings.
- An inventory employee may adjust stock but may not create users.
- A user may see different menus after moving to a different branch or receiving a different role.

Important: Administrators should deactivate accounts when employees leave and should not use one shared account for several people.

4. Dashboard

See the current health of the business at a glance.

What the Dashboard shows

The Dashboard includes sales totals, number of transactions, average sale, purchases, expenses, customer dues, supplier dues, stock health, payment breakdown, sales trends, branch performance, top products, and recent activity when your permissions allow them.

- Sales and profit trends help managers compare periods.
- Inventory Health shows active products, products in stock, out-of-stock products, expiring batches, and stock value when cost access is allowed.
- Open register information shows whether a cashier session is active.
- The notification area highlights low stock and products nearing expiry.

Using filters

Choose the period and branch scope, then apply the filter. A manager may choose all branches; a branch user normally sees only branches assigned to that account.

1. Choose a date period or enter the required dates.
2. Choose a branch if needed.
3. Select Apply or the page's filter button.
4. Read the cards and charts using the selected scope.

5. Sales

Serve customers, review completed sales, and manage returns and dues.

Sales menu

The Sales area contains POS Terminal, Held Sales, All Sales, Sales Returns, and Credit & Due Sales. Sale details and invoices are reached from the sales list or print actions.

- POS Terminal is for creating a sale.
- Held Sales is for transactions paused before payment.

- All Sales is for searching and reviewing completed or other recorded sales.
- Sales Returns is for returning items from an original sale.
- Credit & Due Sales is for customers who still owe money.

Before completing any sale

Check the product name, quantity, price, customer, discount, tax, payment method, and final total. Once a sale is completed, use the supported return or correction workflow rather than changing records directly.

> **Important:** A register session must be open before a cashier can start or complete a sale.

6. POS Terminal

The step-by-step screen for serving a customer and taking payment.

Open a register and start

Cashiers must open a register session before changing a sale. Choose Cash Registers from Finance, open the correct register, enter the opening cash, and return to POS Terminal.

1. Open POS Terminal.
2. If asked, open a register session from Cash Registers.
3. Check that the branch and register shown belong to your counter.
4. Use the current sale tab or create a new tab.

Find products

Use the search box in POS Terminal to search by product name, SKU, brand, or barcode. Products can also be selected from the product cards. A phone camera can be connected as a barcode scanner when your role and register allow it.

- Search for part of a name, such as rice or milk.
- Use the exact SKU or barcode when you know it.
- If a product is marked Out of stock, do not add it. Ask inventory staff to check the branch and location.

Add, change, and remove items

Select a product to add it to the current tab. Review the quantity and price shown in the cart.

1. Find the product.
2. Select the product card or scan its barcode.
3. Increase or decrease the quantity using the cart controls.
4. Remove an item using the line's remove control if the customer no longer wants it.
5. Review the subtotal, discount, tax, and total.

Customer, discount, and tax

Select a customer when the sale is for a known customer, especially for a credit or due sale. Use the discount control only when your role allows it. The system applies configured tax rules and shows the tax summary when enabled.

> **Important:** For a credit sale, confirm the customer before accepting the sale. A walk-in sale should not be recorded as customer credit.

Payment and completion

When the cart is correct, choose one of the active payment methods configured for the business. Enter the amount required by the payment screen and select Complete Sale. The system checks current stock again before completing the sale.

1. Review every line and quantity.
2. Choose the customer if needed.
3. Open the payment area.
4. Choose the payment method and enter the payment amount.
5. Check change or remaining due.
6. Select Complete Sale.
7. Print or show the receipt when available.

Important: If stock or register validation fails, the sale is not completed. Fix the issue and try again; do not ignore the message.

Receipt and invoice

A completed sale receives a sale or invoice number. The receipt contains the business, branch, cashier, customer when selected, products, quantities, prices, discounts, tax, payment, and total according to the configured receipt settings.

- Use the print action from the completed sale when you need another copy.
- Use the invoice or sale detail page to review the recorded transaction.

7. Tabs and Held Sales

Keep one customer's unfinished shopping safe while serving another customer.

POS tabs

A tab is a separate customer transaction. Use a new tab when the current customer is not ready to pay but another customer is waiting.

1. Leave Customer A's products in the current tab.
2. Select the control to create a new tab.
3. Serve Customer B in the new tab.
4. Return to the first tab after Customer B finishes.
5. Check Customer A's cart before completing it.

Example: Customer A is still choosing products. Keep that tab open, create a new tab for Customer B, complete Customer B's sale, then return to Customer A.

Hold and resume

Holding a sale moves the unfinished transaction to Held Sales so it can be resumed later. A held sale is not a completed sale and does not receive payment until it is completed.

1. Open the correct tab.
2. Select Hold Sale.
3. Open Held Sales when you are ready to return.

4 Choose the held sale and select Resume.

5 Review the cart and complete the payment when the customer is ready.

Important: Do not hold the wrong tab. Check the customer and products before resuming.

8. Mobile Phone Barcode Scanner

Use an approved phone camera to scan product barcodes into the open POS sale.

Connect a phone

The phone scanner works from an open POS register and requires the scanner permission. The POS shows a temporary connection QR code and a confirmation code.

1. Open POS Terminal and make sure your register is open.
2. Choose the phone scanner or Connect Phone Scanner option.
3. Show the QR code.
4. Open the QR link on the phone and enter the displayed confirmation code if requested.
5. Wait until the POS reports the phone as connected.

Important: The QR code and code are temporary. Never send them to someone who should not use your register.

Scan and reconnect

Point the phone camera at one product barcode. After a successful scan, the product is checked and added to the active POS tab.

- Connected means the phone can send scans.
- Disconnected means scanning is paused until the phone reconnects.
- If the phone disconnects, reopen the scanner page, use the current pairing option, and wait for Connected.
- If the product is not found, search by name or SKU and ask catalogue staff to check the barcode.

9. Sales Review, Returns, and Customer Dues

Review recorded transactions and correct them through supported workflows.

All Sales and sale details

All Sales lists recorded transactions. Search by invoice, customer, cashier, date, payment, branch, or status when the page provides the filter. Open a sale to review its lines, totals, payment, due amount, and available actions.

- Completed is a finished sale.
- Held is waiting for the customer to return.
- Partial or unpaid means money remains due.
- Use print or invoice actions when a customer needs a copy.

Sales Returns

Create a return from the original sale when an item is brought back. Select the original sale, choose the item and quantity, enter the reason and refund method, and confirm the return. Posting the return records the return and restores stock through the normal workflow.

1. Find the original sale.

2 Select Create Sales Return.

3 Choose the returned product and quantity.

4 Choose the reason and refund or customer-credit method when shown.

5 Review the return total.

6 Submit or post the return if your permission allows it.

Important: Do not create a return for an item that was not part of the original sale. Ask a manager when approval is required.

Credit and due sales

Credit & Due Sales lists customer balances that were not fully paid. A customer should be selected before recording credit so the amount can be followed later.

1 Open Credit & Due Sales.

2 Find the customer or invoice.

3 Review total, paid amount, outstanding amount, and due status.

4 Record a customer collection from the customer detail or collection action when permitted.

5 Keep the receipt or reference for the customer.

10. Catalogue

Keep the products and the information used by the POS accurate.

Products

The Products page lists active and inactive products. Search by name, SKU, brand, category, or barcode, then use View, Edit, Archive, or Activate as allowed.

- Product Name is what staff see when searching.
- SKU is your business's unique product code.
- Barcode is the code used for scanning.
- Category groups similar products.
- Brand identifies the maker or retail brand.
- Unit tells the system whether the product is sold as a piece, bottle, packet, kilogram, litre, or another unit.
- Cost Price is what the business pays; Retail Price is what the customer pays.

Create or edit a product

Select Add Product or open an existing product and choose Edit. Complete the required fields, check the price and unit, then save.

1 Enter the product name.

2 Enter a unique SKU if automatic SKU is not enabled.

3 Choose the category, brand, and unit.

4 Enter cost and selling prices.

5 Set stock, reorder, batch, expiry, or barcode details when the form provides them.

6 Save and search for the product in POS Terminal.

Important: Do not reuse a SKU or barcode for two different sellable products.

Categories and Brands & Manufacturers

Categories make product searches and reports easier. Brands & Manufacturers store the maker name and contact details used by products.

1. Open Categories or Brands & Manufacturers.
2. Choose Add or Create.
3. Enter the name and any available description or contact information.
4. Save, then assign the category or brand from the product form.

Units and conversions

A unit describes how an item is measured or sold. A conversion tells the system how one unit relates to another.

Example: If one carton contains 24 bottles, set the purchase unit to Carton, the selling unit to Bottle, and the conversion to 1 Carton = 24 Bottles. Check the product's actual packaging before saving.

Prices and Barcodes

Prices & Barcodes lets authorised staff review or add branch prices, quantity pricing, and barcode records. Use the actual product barcode when available; use an internal business code only when clearly identified as internal.

Important: After changing a price or barcode, test the product in POS Terminal before relying on it at the counter.

11. Inventory

Know what is available, where it is stored, and what needs attention.

Inventory Overview

Inventory Overview summarises stock value, stocked products, low-stock items, expiring batches, recent movements, and branch or category totals. Use it for a quick check before ordering or opening a shift.

Branches and stock locations

A branch is a shop or business site. A stock location is a place inside a branch, such as Sales Floor, Storage Room, or Quarantine. POS selling stock must belong to the correct branch and saleable location.

Example: Dhaka Main Branch can contain Sales Floor and Back Store. A product in Back Store is not automatically available on the Sales Floor until it is transferred or adjusted according to your process.

Stock by Location

Use Stock by Location to search a product and see branch, location, batch, on-hand quantity, reserved quantity, available quantity, and cost value. Filter by branch or positive/zero stock when needed.

Batch and Expiry

A batch is a group of products received together. Batch & Expiry shows batch number, dates, status, and available quantity. Check food, drinks, cosmetics, and other date-sensitive items before selling or receiving them.

Important: Do not add expiry dates to goods that do not expire. Follow your business process for damaged or expired items.

Low Stock

Low Stock lists products at or below their reorder level. Use it as a shopping list for purchasing or a transfer request.

1. Open Low Stock.
2. Review product, branch, quantity, and reorder level.
3. Check whether more stock is already in another location.
4. Create a purchase or stock transfer when appropriate.
5. Recheck the list after receiving stock.

Stock Adjustments

Use an adjustment for a counted difference, damage, loss, expiry, or another approved correction. Enter the branch, reason, product, batch when applicable, location, counted quantity, cost, and notes.

1. Open Stock Adjustments and create an adjustment.
2. Choose the branch and enter a clear reason.
3. Add the product and correct location.
4. Enter the counted quantity and notes.
5. Submit or approve/post it according to your role.
6. Check Stock by Location after posting.

> **Important:** Adjustments change recorded stock. Count carefully and explain the reason so a manager can review it.

Stock Transfers

A transfer moves stock between different branches or locations. Choose source branch/location, destination branch/location, dates, products, quantities, units, and batches when needed. The transfer may require approval and receiving.

1. Create a transfer.
2. Check the source and destination are different.
3. Add each product and quantity.
4. Submit for approval when required.
5. Dispatch from the source and receive at the destination when those actions are available.
6. Check both locations after completion.

> **Example:** Move 20 bottles from the Back Store at Dhaka Main Branch to the Sales Floor. Confirm both locations before dispatching.

12. Purchasing and Suppliers

Record what the business orders, receives, and returns to suppliers.

Suppliers

Suppliers stores the people or businesses you buy from. Add the supplier name, contact person, phone, email, address, categories, and notes shown by the form. Review supplier purchases and balances where available.

Create a purchase

A purchase records an order from a supplier. It is not the same as receiving goods; stock changes when goods are received through the receiving workflow.

1. Open Purchases and choose Create or Add Purchase.
2. Choose the branch and supplier.
3. Enter purchase date, expected delivery date, supplier reference, shipping amount, and notes.
4. Add each product, ordered quantity, unit, conversion factor, unit cost, tax rate, and notes.
5. Save the purchase.
6. Use the receiving action when goods arrive.

Important: Check supplier, branch, quantities, and unit cost before saving.

Receive goods

When goods arrive, open the purchase and create a receipt. Choose the destination location and enter received, accepted, and rejected quantities. Add batch number, manufacturing date, expiry date, unit cost, and notes when relevant.

1. Open the purchase.
2. Choose Receive or the goods-receipt action.
3. Choose the destination stock location.
4. Enter accepted and rejected quantities.
5. Enter batch and expiry information for date-sensitive products.
6. Save the receipt and check Inventory.

Purchase returns

Use Purchase Returns when goods are sent back to a supplier. Choose the purchase, supplier, source location, reason, quantities, batch, unit cost, and supplier reference. Submit or post the return according to your permissions.

Important: Confirm the return quantity and source location before posting because stock will be reduced.

13. Customers

Keep customer contact information, purchases, balances, and payments together.

Create a customer

Open Customers and choose Add Customer. Enter the customer's name, code, phone, email, billing address, shipping address, branch, credit details, and notes that the form provides.

1. Choose Add Customer.
2. Enter the customer's name and a unique customer code.
3. Enter phone and email carefully.
4. Add address and credit information when needed.
5. Save, then search for the customer before recording a credit sale.

Customer details and ledger

Customer Details shows the profile, purchase history, balance, and payments available to your account. The ledger is a simple record of amounts charged to the customer and payments received.

> **Important:** Verify the phone number and customer name before recording a payment or credit sale.

Customer payment

Use the customer payment or collection action to record money received later. Select branch, date, amount, payment method, reference, and notes. The outstanding balance should reduce after the payment is saved.

14. Finance

Open registers, record operating expenses, and keep cash work clear.

Cash Registers

A register is the physical cash counter. A register session is one cashier's open work period. Cashiers must open a session before creating or completing POS sales.

1. Open Finance → Cash Registers.
2. Choose the correct register and select Open session.
3. Enter opening cash and notes.
4. Use the register during the shift.
5. At the end, select Close, count the cash, enter declared closing cash, and explain any difference.
6. Review the session detail or print the closing record.

> **Example:** If the drawer starts with ■5,000, enter ■5,000 as opening cash. At closing, count the drawer and enter the actual amount, not the expected amount.

Expenses

An expense is money the business spends outside a customer sale. The form includes branch, date, category, payee, description, payment method, financial account, amount, tax, external reference, and notes.

1. Open Finance → Expenses.
2. Choose Add Expense.
3. Choose the branch and expense category.
4. Enter payee, description, amount before tax, and tax amount.
5. Choose payment method and account when required.
6. Add the receipt or reference in the note or reference field if supported.
7. Submit or approve/pay according to your role.

> **Example:** Use Expenses for electricity, delivery, transport, cleaning, or office supplies—not for products sold to customers.

15. Reports

Turn recorded activity into information for decisions.

Reports Dashboard

Reports use a date range, branch, and register scope. Choose the filters and select Apply before reading the charts and figures. Export is available when your role has report-export permission.

- Sales summary shows completed sales, returns, and profitability.
- Purchase summary shows posted purchases and purchase returns.
- Payment-method breakdown groups posted sale payments.
- Expenses shows paid expenses by date, branch, and category.
- Cash-register sessions shows opening cash and reconciliation activity.
- Inventory summary shows current quantity and valuation by product and branch.
- Customer dues shows outstanding customer ledger balances.

Using a report

Start with the question you want answered, then set the narrowest useful date and branch filters. Use the result to decide whether to order stock, follow up a due customer, investigate a register difference, or review business performance.

1. Open Reports.
2. Choose the date range.
3. Choose branch and register if needed.
4. Select Apply.
5. Open a detailed report when you need the rows behind a number.
6. Select Export when you need a file and your permission allows it.

16. Administration

Manage people, business rules, branches, payments, and protection settings.

Users

Users & Permissions lets authorised administrators add employees, edit profiles, activate or deactivate accounts, assign roles, and review activity. Enter username, email, name, password, role, business, and branch access only as the form requires.

1. Open Users & Permissions.
2. Choose Add user.
3. Enter the employee's own account information.
4. Assign the correct role and branch scope.
5. Save and ask the employee to sign in with their own account.
6. Deactivate the account when the employee leaves.

Roles and permissions

Roles group permissions such as viewing products, creating sales, receiving purchases, adjusting stock, opening registers, reviewing reports, and managing settings. Role assignment can be scoped to a business or branch.

Important: Give the smallest access that lets a person do their job. Do not give cashier accounts administrator access just to solve a missing-menu problem.

Business Settings

Business Settings contains the pages available to administrators: Business profile, Branches, Localization, Currency & taxes, Invoices & receipts, Payment methods, Product settings, Inventory settings, POS settings, Register settings, Notifications, Security, and Backups & audit.

- Business profile stores the name, contact details, address, and logo.
- Localization controls timezone, language/locale, dates, times, week start, and decimal precision where enabled.
- Currency & taxes controls currency code, symbol, position, and tax rates.
- Invoices & receipts controls prefixes, next numbers, footer text, shown details, paper size, automatic printing, and email options.
- Payment methods controls the methods shown at checkout.
- Product, inventory, POS, register, notification, and security sections control business rules such as stock, expiry, discounts, held sales, opening floats, warnings, and login protection.
- Branches and registers must be configured before branch selling or register work can begin.

Audit and security

Audit records help administrators see important actions, who performed them, and when. Keep separate accounts, strong passwords, correct permissions, and active branch assignments. Never place passwords or secret settings in notes or screenshots.

17. Common Daily Tasks

Short checklists for the work employees do most often.

Cashier — sell products

1. Sign in.
2. Open Cash Registers and open your register session.
3. Open POS Terminal.
4. Search or scan products.
5. Check quantities and prices.
6. Select the customer if needed.
7. Choose payment and complete the sale.
8. Give the receipt.
9. Sign out at the end of the shift.

Cashier — serve two customers

1. Leave the first customer's cart in its tab.
2. Create a new tab.
3. Complete the second customer's sale.
4. Return to the first tab and check it before completing.

Inventory staff — check and correct stock

1. Open Inventory Overview or Low Stock.
2. Check branch and location.
3. Count the product when needed.
4. Use Stock Adjustment with a clear reason if the count is different.
5. Check Stock by Location after posting.

Inventory staff — move stock

1. Create Stock Transfer.
2. Choose source and destination branches/locations.
3. Add product, unit, quantity, and batch when needed.
4. Submit, approve, dispatch, and receive according to the workflow.
5. Check both locations.

Purchasing staff — record a delivery

1. Open or create the purchase.
2. Confirm supplier and branch.
3. Open receiving.
4. Enter accepted and rejected quantities.
5. Enter destination, cost, batch, and expiry details.
6. Save and check Inventory.

Administrator — add an employee

1. Open Users & Permissions.
2. Create the employee's account.
3. Assign the correct role and branch.
4. Tell the employee to use their own password.
5. Check access without sharing your administrator password.

Finance staff — review the shift

1. Open Cash Registers.
2. Review open and recent sessions.
3. Check expected and declared cash.
4. Review expenses and payment activity.
5. Investigate differences using the session detail and reports.

18. First Day Guide

A simple learning path for a new employee.

Learn these first

1. Sign in using your own account.
2. Look at the Dashboard and learn the sidebar.
3. Open the menu sections allowed for your role.
4. If you are a cashier, practise finding a product and changing quantity.
5. Learn how to hold and resume a sale.
6. Learn how to check whether a register is open.
7. Ask before changing products, stock, customer credit, or settings.
8. Sign out whenever you leave the workstation.

Important: It is normal for different employees to see different menus. This is how the business protects important work.

19. Troubleshooting

Safe first steps when something does not look right.

I cannot see a menu

Your account may not have the permission or branch access needed for that area. Ask an administrator to review your role; do not use another person's account.

I cannot find a product

Search by part of the name, SKU, brand, or barcode. Check spelling and try the Catalogue page. If it is still missing, ask catalogue staff to confirm that the product is active and has the correct barcode.

A product is out of stock

The available quantity may be zero at the current branch or saleable location. Ask inventory staff to check Stock by Location, another location, a pending receipt, or an approved transfer. Do not force the sale.

The barcode does not work

Try entering the barcode or SKU manually and search by product name. If the product is found but scanning fails, ask an authorised catalogue user to check its barcode record. Never replace a barcode without checking for duplicates.

The phone scanner is disconnected

Check that the POS register is open, reopen the scanner connection option, scan the new QR code, and wait for Connected. If it still fails, use the POS search and tell a manager.

I entered the wrong quantity or completed the wrong sale

Before completion, change or remove the line in the cart. After completion, use the supported Sales Return or manager-approved correction process. Do not directly change a completed record.

I forgot my password

Use Forgot password? on the sign-in page. If recovery is unavailable, contact an administrator. Do not ask another employee for their password.

The register or payment is blocked

Check that the correct register session is open, the payment method is active, and your role allows the action. Ask a manager before repeating a payment.

20. Important Warnings

Small checks prevent expensive mistakes.

Before you save or complete

- Check customer name and phone before recording credit.
- Check product, quantity, unit, branch, and location before receiving or transferring stock.
- Check supplier and unit cost before completing a purchase.
- Use stock adjustments only for real counted differences and write a clear reason.
- Review the payment method and amount before completing a sale.
- Do not share passwords or leave a register open for another person.
- Use returns and approvals for completed transactions instead of trying to erase history.