INVEMA – YOUR ULTIMATE INVENTORY SOFTWARE

A Product of Exelsor Projects Limited

ABSTRACT

Invema is an inventory software designed to streamline inventory operations, reduce costs associated with stockouts or overstocking, and improve overall efficiency in managing inventory-related tasks.

Contents

Introduction

Invema is an inventory management software designed to help business owners keep track of their stock levels, sales, and purchases. It typically offers features such as real-time inventory tracking, barcode scanning, order management, reporting, and integration with other business systems like accounting software.

Invema aims to streamline inventory operations, reduce costs associated with stockouts or overstocking, and improve overall efficiency in managing inventory-related tasks.

Invema is built to help users with little or no accounting background keep record of their daily business transactions without worrying of debts and credits principles as it helps you fix that.

It also supports businesses with multiple warehouses or locations by providing features to manage inventory across different locations. Users can track stock levels, transfers, and movements for each location separately or collectively.

The major goals Invema intends to achieve in every business is to:

- Increase profit and decrease work load
- Make sales faster
- Stock control
- Monitor tax returns
- Track staff sales
- Track expiry dates
- Track product performance and lot more.

What Invema Shows You about Your Business

Below is a summary of the core features of Invema:

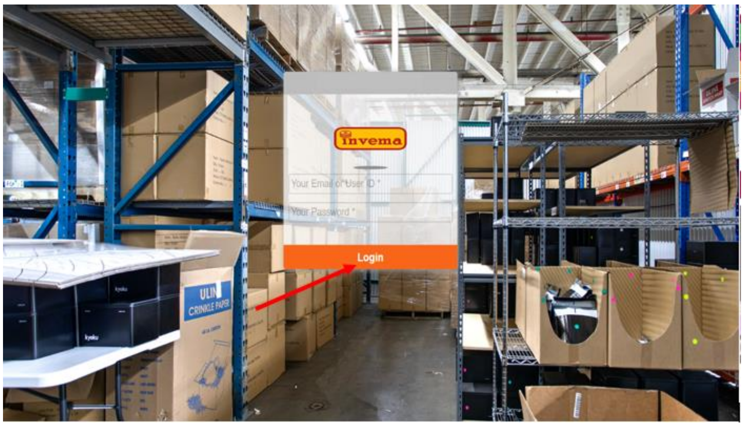
1. **Graphical Representation of Inventory Levels:** The dashboard includes charts or graphs illustrating the current inventory levels of different products or categories. This could be displayed as bar charts, pie charts, or line graphs.
2. **Recent Transactions:** A section displaying recent transactions such as sales, purchases, returns, and adjustments. This could include information such as date, item name, quantity, and transaction type.

3. **Sales Performance:** Graphs or tables showing sales performance over time, including metrics such as total revenue, number of orders, average order value, and top-selling products.
4. **Purchase Orders:** A summary of open purchase orders, including pending orders, expected delivery dates, and quantities on order.
5. **Inventory Turnover Ratio:** Calculation and visualization of the inventory turnover ratio, providing insights into how quickly inventory is being sold and replenished.
6. **Supplier Performance:** Metrics related to supplier performance, such as on-time delivery rates, order accuracy, and lead times.
7. **Customizable Widgets:** The ability for users to customize their dashboard with widgets displaying the metrics and information most relevant to their specific needs and workflows.
8. **Navigation and Quick Actions:** Intuitive navigation elements and quick action buttons allowing users to easily access different sections of the software and perform common tasks like creating purchase orders or generating reports.
9. **Stock positions:** This helps users know the quantity and worth of goods that are available as at the time you were checking it.
10. **All time inventory:** This shows you an all-time sales progress of your business. You see a detailed tabular presentation of all the sales activities in your business.
11. **Graphical Analysis:** This shows you charts or graphs illustrating the current inventory levels of different products or categories. This could be displayed as bar charts, pie charts, or line graphs. It allows users to analyze inventory data and make informed decisions to optimize their inventory management processes.

How to Login to Invema

To log in,

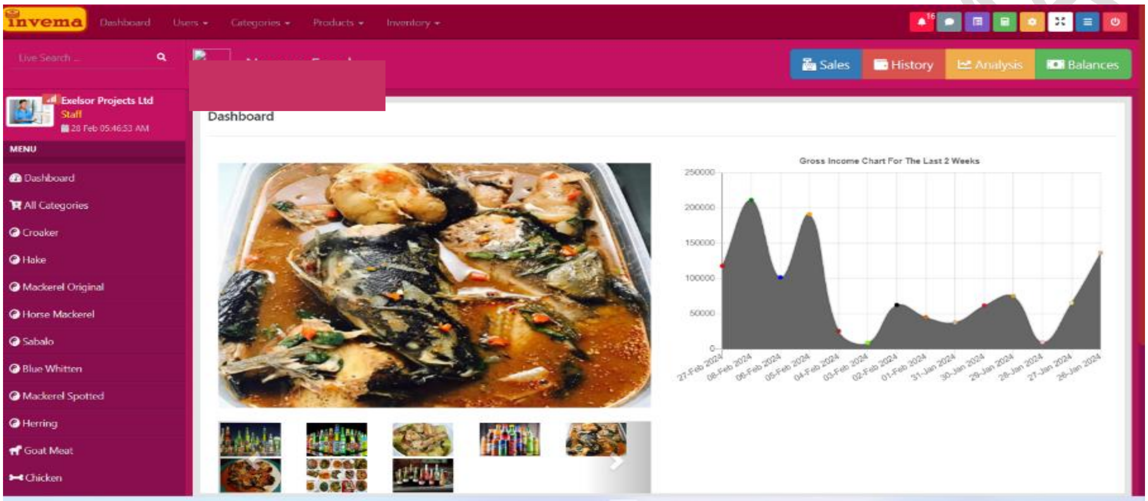
1. Click on Invema software
2. Enter User ID or Email
3. Then enter your password
4. Click 'login' and it takes you automatically to the home page.



Invema Dashboard/Main Menu

The dashboard of Invema is designed to provide users with a quick overview of key inventory metrics and performance indicators. It provides a comprehensive and user-friendly interface for monitoring and managing their inventory effectively. It prioritizes clarity, accessibility, and actionable insights to support informed decision-making and efficient inventory control.

To access the Invema platform, you need to enter your login credentials and the system immediately gives you access displaying the main menu screen with navigation bars with dropdown menus containing a number of options for you to take actions on. Here are different Invema home page setup:



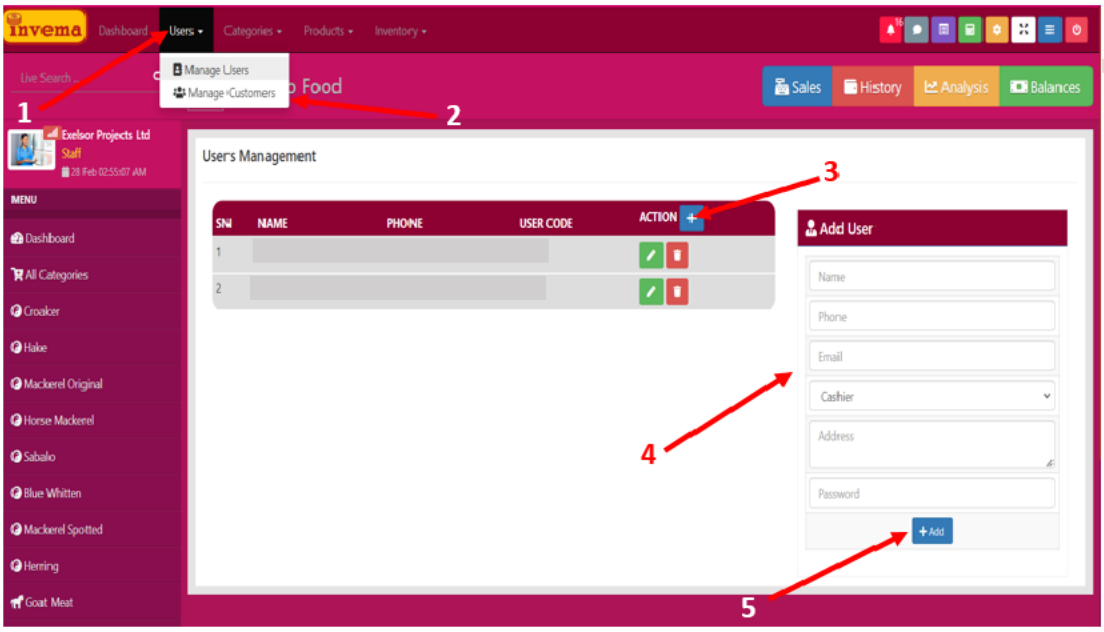
Users

This has to do with permissions and roles given to various users. Depending on their role within the organization, users have different levels of access and permissions within Invema. The Admin has full access and can manage user accounts, roles, and permissions within the software. He adds new users, edit user profiles, and defining access levels for different roles. Admin is in charge of entering stocks and effecting major changes in Invema, although he can assign stock modifications to other users. Users like cashier and Sales Rep have limited access as they cannot add users or perform major modification in Invema.

Manage users: Here, you assign roles to users. You will also be required to fill in the user's name, phone number, email address, home address and also assign a unique password to the user.

How to Add New User

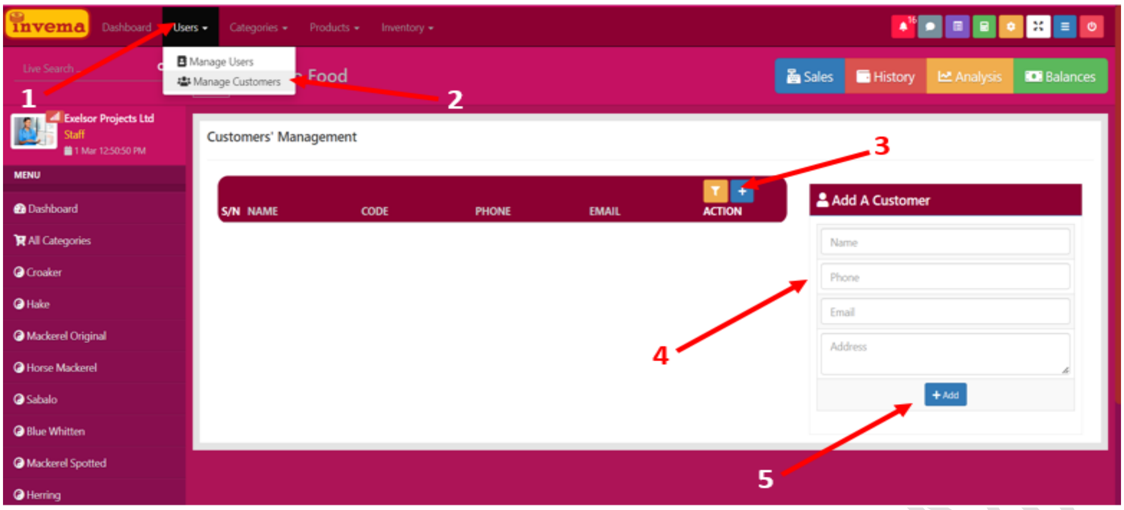
1. Click on ‘User’
2. Click on ‘Manage User’
3. Click on the ‘+’ sign, and a dialogue box will appear
4. Enter the name, phone number, email, select role (Admin or Cashier), address and lastly assign password to user.
5. Click ‘Add’ to save the user



Manage Customers: Here you can enter customer’s details in other to keep track on them.

How to Add Customers Details

1. Click on User
2. Click on Manage Customer
3. Click on the ‘+’ sign and a dialogue box will appear.
4. Enter the name, phone number, Email address and home or office address of the customer.
5. Click ‘Add’ to save the user

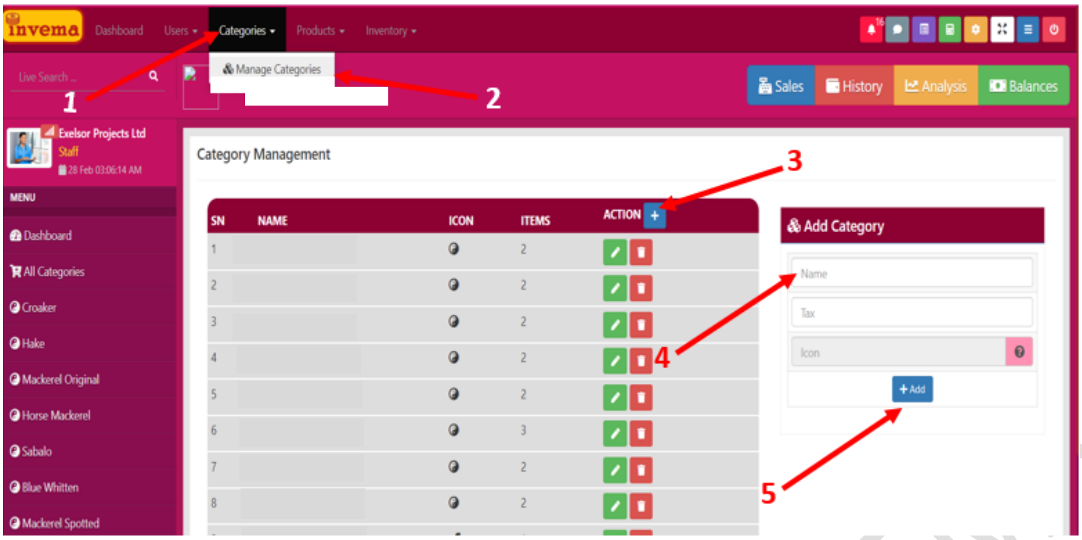


Categories

In Invema, categories refer to a way of organizing and grouping inventory items or products based on common characteristics or attributes. It provide users with a flexible and efficient way to organize and manage their inventory items, enabling better organization, navigation, and analysis of product data within the software platform. Categories makes it easy for filtering and search of inventory items as it narrows down search results and find specific products or groups of products.

How to Create Categories

1. Click on ‘Categories’
2. Click on ‘Manage Categories’
3. Click on the ‘+’ sign and a dialogue box will appear
4. Input the name of the category to which various products belong
5. Select an icon that represents the category
6. Click ‘Add’ to save your changes.



Products

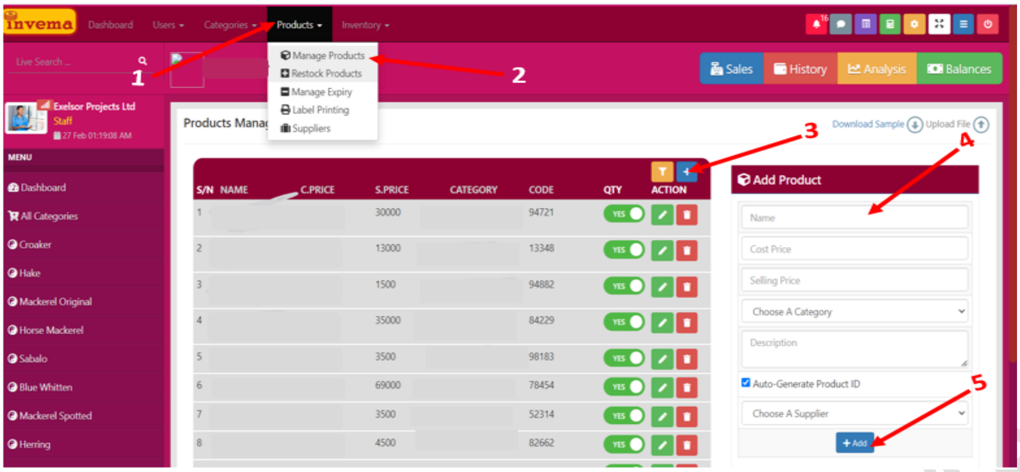
The products icon in Invema provides users with access to features and functionalities related to managing inventory items or products within the software. Users can view and manage a catalog of all inventory items or products available in the system. This includes information such as product names, descriptions, categories, and pricing.

Here, you have options such as: Manage Products, Restock Products, Manage Expiry, Label Printing and Suppliers.

Manage Products: Here, you can set information about different product in such manner such as product names, descriptions, categories, and pricing. You can manage different variants of a product, such as size, color, or style variations.

How to Enter New Stocks

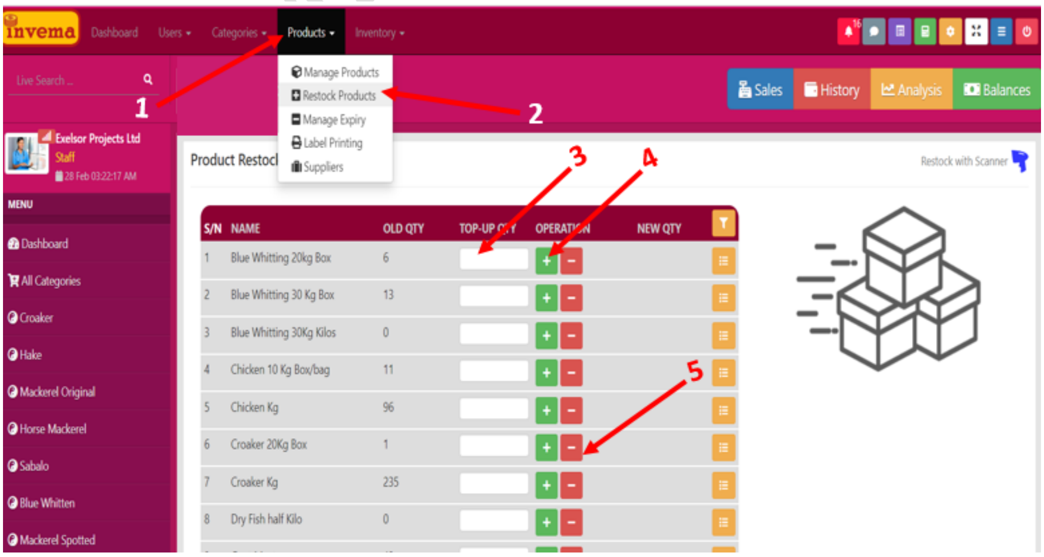
1. Go to products and click on it, a dropdown will appear with various options
2. Click on Manage products
3. Click on the '+' sign at the left side of the box.
4. A smaller dialogue box will appear where you can type in the name, cost price and selling price of the product.
5. Then, click 'Add' to save.



Restock Products: The restock product icon helps in streamlining the entire inventory management process, from monitoring stock levels to placing reorders. All you need to do is automate inventory monitoring to be alerted about low stock levels, and prevent you from running out of stocks. You add new stocks here and the quantity.

How to Restock Products

1. Click on ‘Product’
2. Tap on restock product and a dialogue box with various product will appear
3. Go to the product you want to restock, in the ‘Top-Up Qty’ section, enter the number of goods you are adding.
4. Click on the ‘+’ sign to add the product.



However, if you entered a number higher than what you were supposed to enter, this is what to do;

Find the difference between what you entered and the actual number

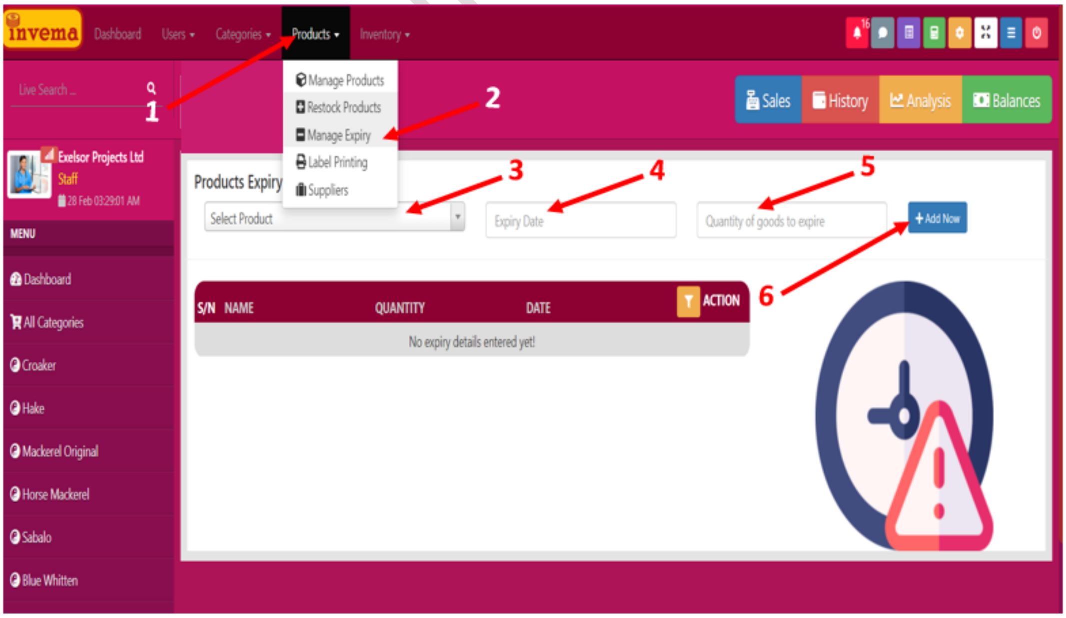
Enter it in the 'Top-Up Qty' section and click on the '–' sign to reduce it to the actual number.

Manage Expiry: This area helps you to easily monitor the expiration dates of your products. Simply enter the product name, expiration date, and quantity. It will automatically keep track of the remaining shelf life for each item. As products approach their expiration, you will receive alerts, ensuring you can plan accordingly and reduce waste.

How to Manage Expiry Date

1. Go to product and tap on it
2. Click on 'Managing Expiry'
3. Select the Product
4. Enter the expiry Date
5. Enter the quantity of goods to expire on the set date
6. Click on 'Add Now'

Repeat the same thing for all the products

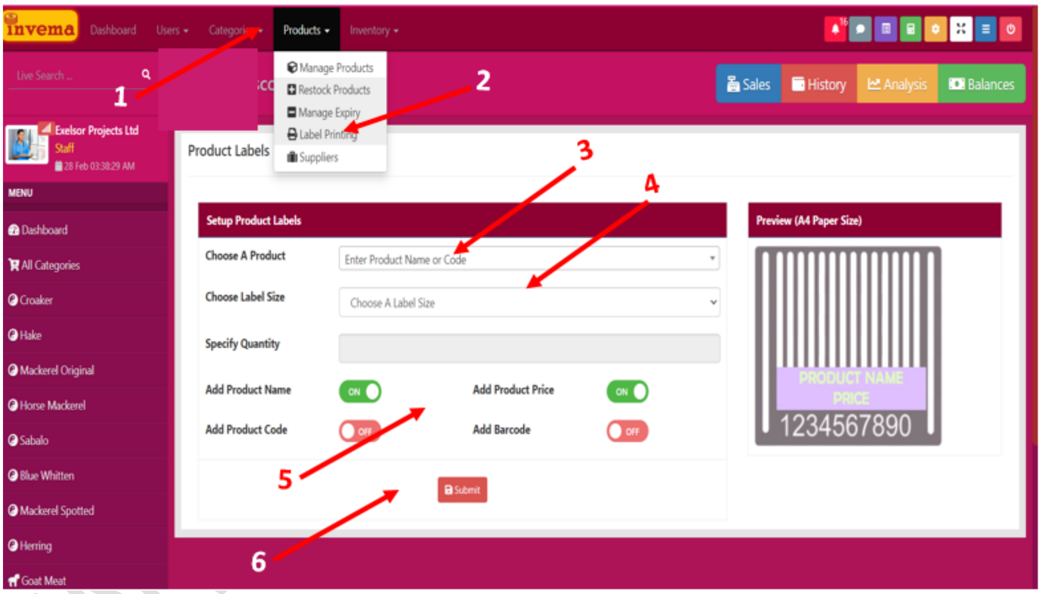


Label Printing: Here, you set up your product labels. When you click on the product labels, it shows you a drop-down menu from where you set up the product labels. You enter the product name or code, choose the label size and quantity you want to print. You choose to add the product name, price, code, and barcode to the label and save.

How to Setup Product Label

1. Click on 'Product'
2. Click on 'Label Printing'
3. Select the product name
4. Choose a label size
5. Turn-on Product name, price, Product Code and barcode if you want them to appear on label.
6. Click on 'submit' to save

Follow same step to setup various product labels



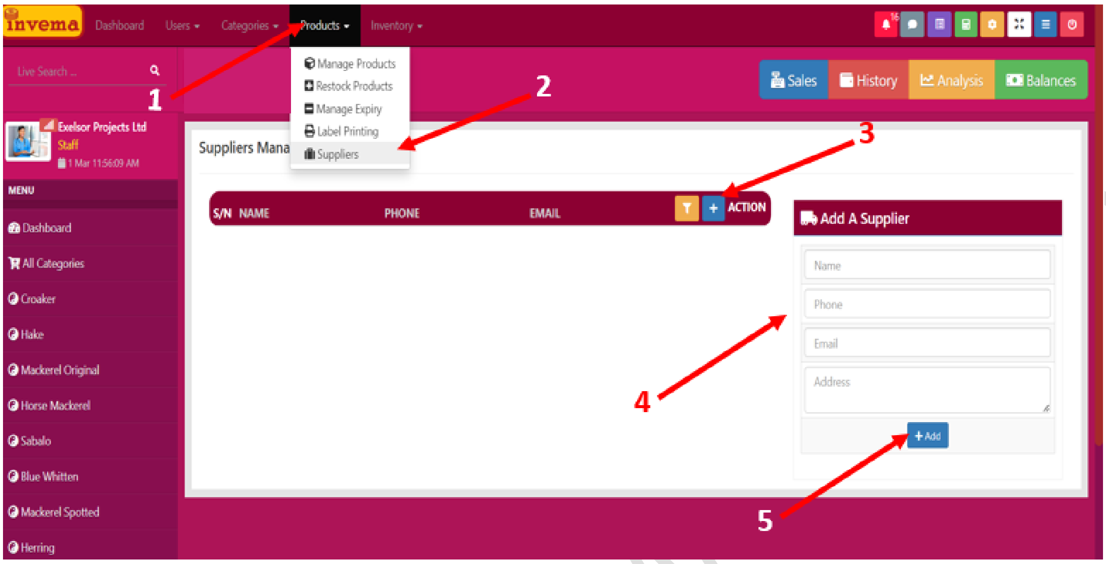
Suppliers: You can view and manage supplier information for each product, including supplier names, contact details, and pricing agreements.

How to Manage and Store Suppliers Details

1. Go to products
2. Click on 'Supplier'
3. Tap on the '+' sign at the right side of the dialogue box

4. Then, enter the name, Phone number, email address and home or office address of the supplier
5. Click 'Add' to save

Follow same step to enter as many suppliers you desire.



Inventory

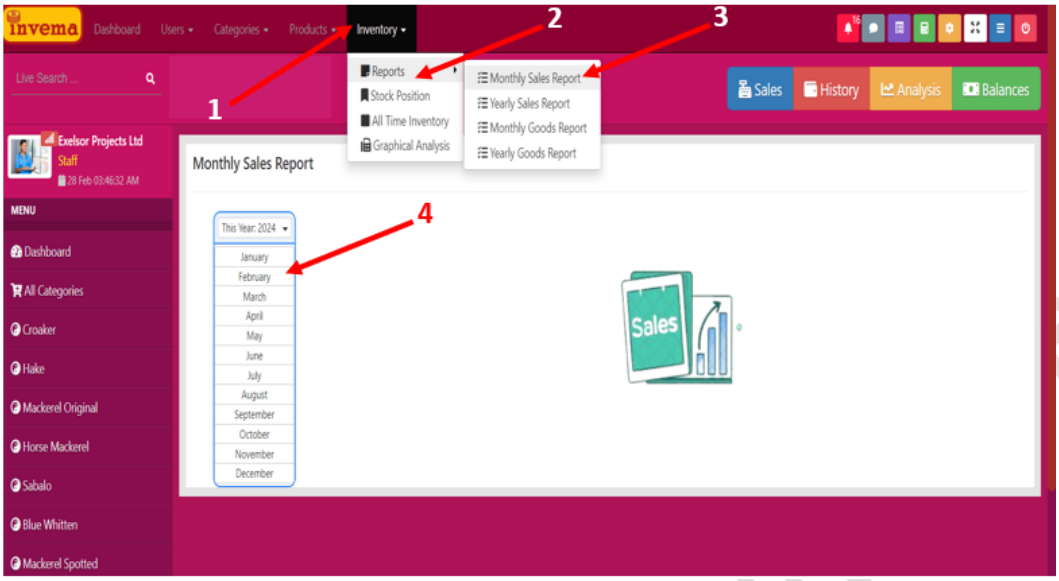
The inventory module serves as the central hub for managing all aspects of inventory within a business. It provides businesses with comprehensive tools and functionalities to effectively manage their inventory, optimize stock levels, and streamline inventory-related processes for improved efficiency and profitability. It helps you view and manage their inventory levels, locations, and movements in real-time. The inventory button has a dropdown with four menu:

Reports: This provides information on any product's sales. You can view product reports for any product at any time. To view the reports, simply choose the product or products you want and the period of time you want to look at. It can be daily, weekly, monthly, or annual report.

How to Get Weekly, Monthly or Yearly Sales Report

1. Go to inventory, click on it to see a dropdown,
2. Click on reports
3. Select if it is weekly, monthly or yearly report you want
4. Enter the dates from where you want to track to where you want to stop.
5. Proceed to enter the week, month or year you want and click enter

6. The sales report will appear immediately.
7. You can print it if you want or send as mail to anyone that needs it.

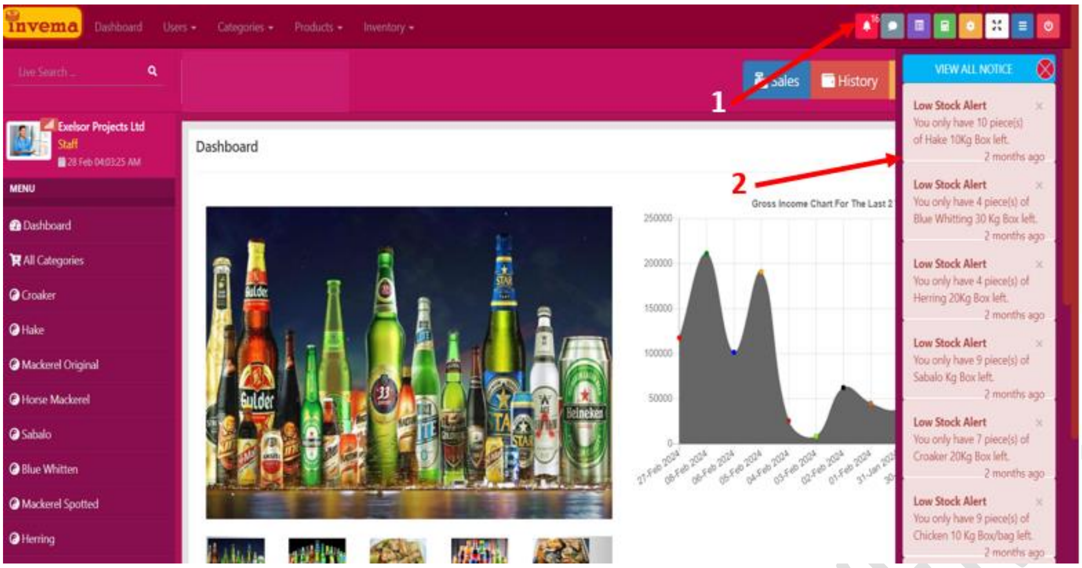


Notifications and Alerts

A section for important alerts and notifications, such as stockout warnings, expiration date, pending approvals, or system updates. The alert panel highlights items that are running low in stock, indicating when it's time to reorder or replenish inventory. It also notifies you of expiration time of the various goods.

To view your notification,

1. Click on the notifications bell
2. It will display a dropdown menu with your various notifications alerts.

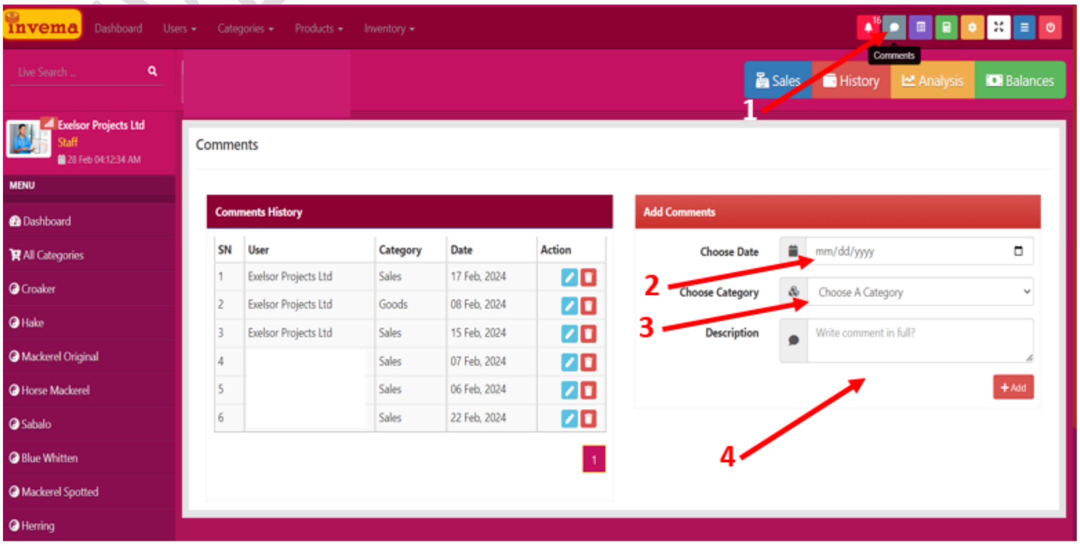


Comments

Within the Invema inventory software, the comment icon serves as a vital communication tool, allowing users to add contextual information, insights, or notes related to sales, orders, or specific products directly within the platform. It plays a crucial role in facilitating efficient communication, documentation, and collaboration within the inventory management process, enhancing productivity and streamlining operations for users.

How to Make Comments on Invema

1. Click on the comment icon and it opens a dialogue box,
2. Enter the date of the comment,
3. Select the category – goods or sales,
4. Then enter the comment you want to make in the description section.



One significant feature of the comment icon in Invema is its ability to display the history of previous comments. This ensures transparency and enables users to reference past discussions, decisions, or annotations made within the platform easily.

Proforma Invoice

Proforma invoice helps in generating quotation for goods yet to be paid for, the quotation is sent to a potential buyer for consideration. This involves entering relevant details such as the description of the goods or services, quantities, prices, and payment terms.

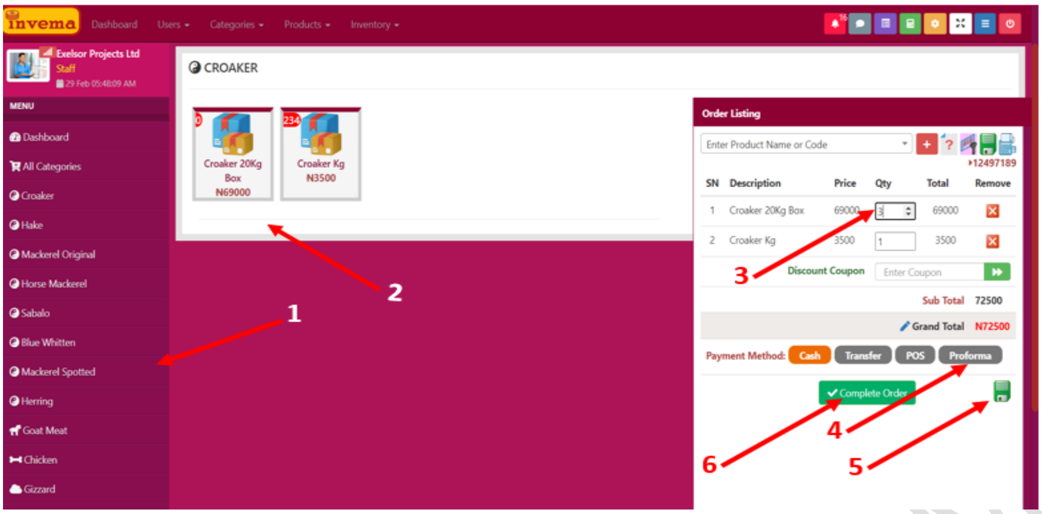
Invema enhances the invoicing process by providing users with a convenient and efficient way to create, manage, and track proforma invoices, helping to facilitate smooth transactions and communication with customers. It also offers customization options for proforma invoices, allowing users to add company logos, adjust layouts, and include additional information or terms specific to the transaction.

You can preview proforma invoices before finalizing them and make any necessary edits or adjustments to ensure accuracy and completeness. You can print proforma invoices directly from Invema or send them to customers electronically via email. This facilitates communication with customers and expedites the approval process for orders.

Invema also include features for tracking the status of proforma invoices, such as indicating whether they have been sent, viewed by the customer, or approved for conversion to final invoices. Finally, proforma invoices generated in Invema are typically archived for record-keeping purposes, allowing users to retrieve and reference them as needed for auditing, reporting, or customer inquiries.

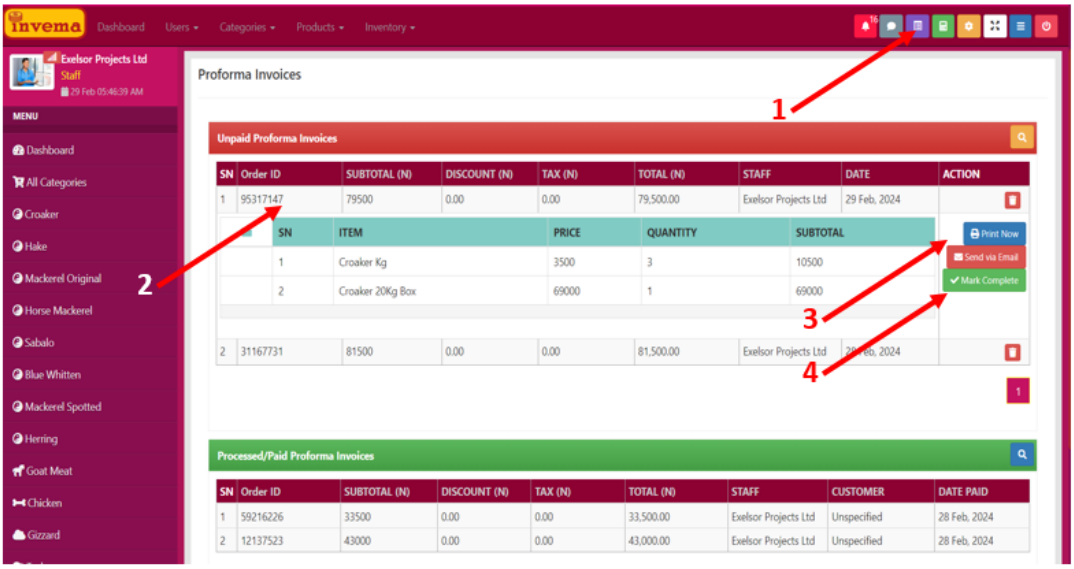
How to Generate Proforma Invoice

1. On the left side bar, Click on the category the product you want to sell falls under
2. Select the products you are generating proforma invoice for, After selecting all products from the various categories
3. Enter the quantity of products being requested
4. Click on ‘Proforma’
5. Then, click on the ‘Save Icon’ to save
6. The Proforma invoice is generated and added to Unpaid Proforma Invoices



To view the generated invoice,

1. Go to the Proforma Invoice icon
2. Click on the invoice you created and you will see the details of what you have created
3. Select either print or send via email to the person that needs it.
4. Once payment is made, click on 'Mark complete' for it to be added to 'process/paid invoices'



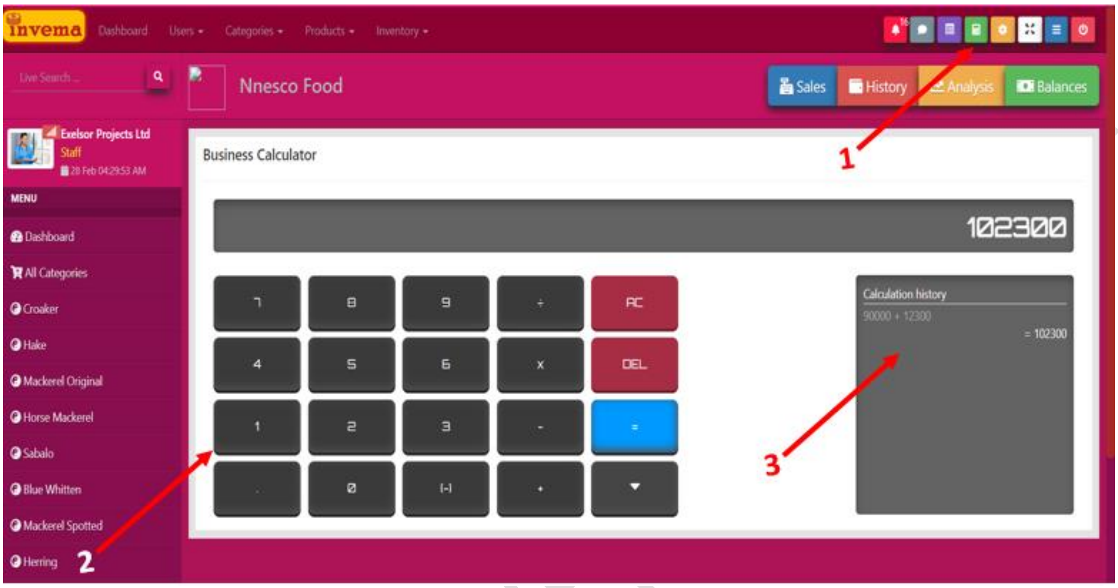
Calculator

The calculator feature in Invema provides users with the ability to perform calculations related to inventory management and other business operations directly within the software interface.

Some potential functions the calculator in Invema might offer are cost calculation, price markup, discounts, unit conversions, tax calculation and lot more.

To use the calculator, click on the calculator icon on the left side of the dashboard.

The calculator will appear, then calculate whatever you want and the result will show on the screen.



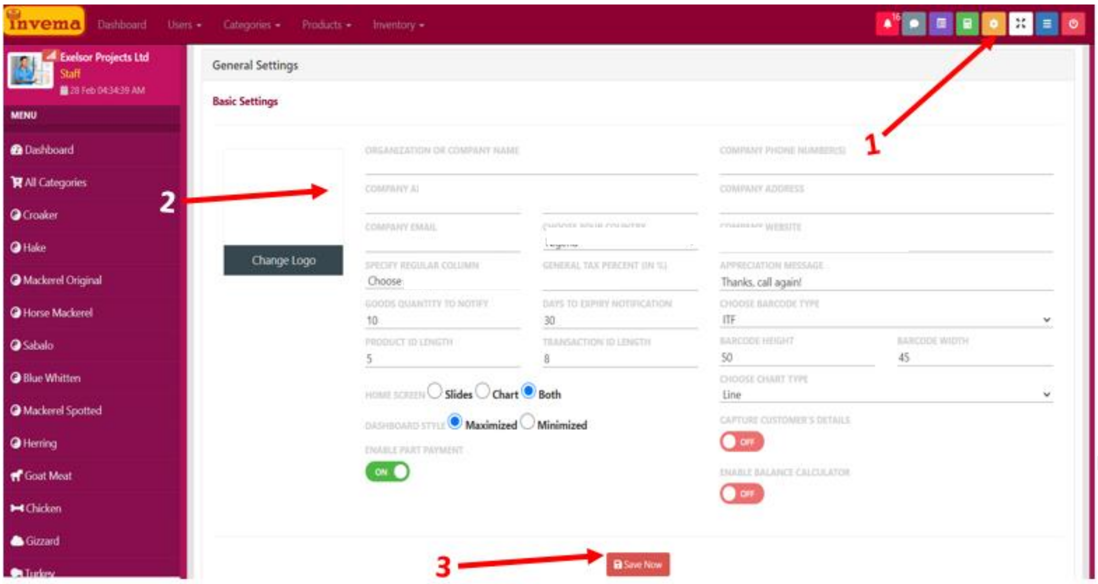
Settings

The setting icon in Invema typically provides users with access to various customization options and administrative features to tailor the software to their specific needs and preferences. It serves as a centralized hub for managing configuration options, preferences, and administrative tasks to optimize the software for the specific requirements of each user and organization.

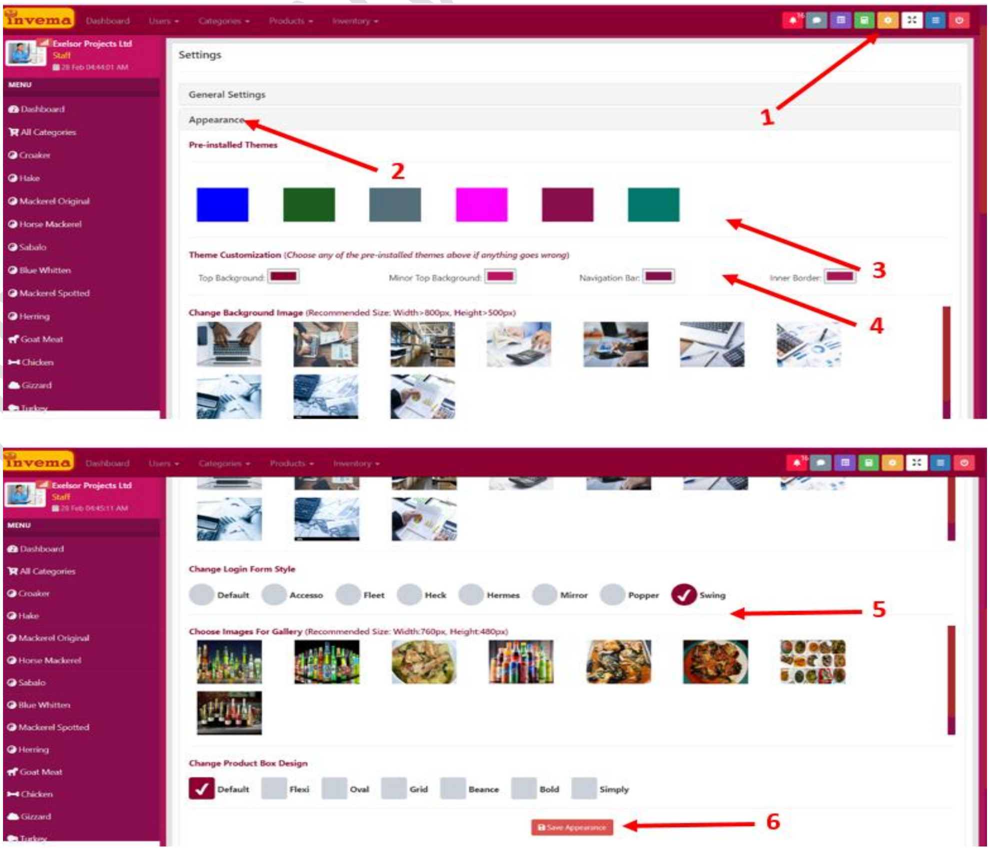
Here are some common functionalities that the setting icon in Invema offers:

Basic setting: In this section of Invema, users can input essential business details for their organization. You can configure company-specific settings such as business information (organization's name, shop ID, address, country, email address, website), currencies, language preferences, general tax percentage, expiration date notification settings, barcode type and height preferences, accepted modes of payment, and more.

Once you finish the basic setup, click on 'Save Now' to save.

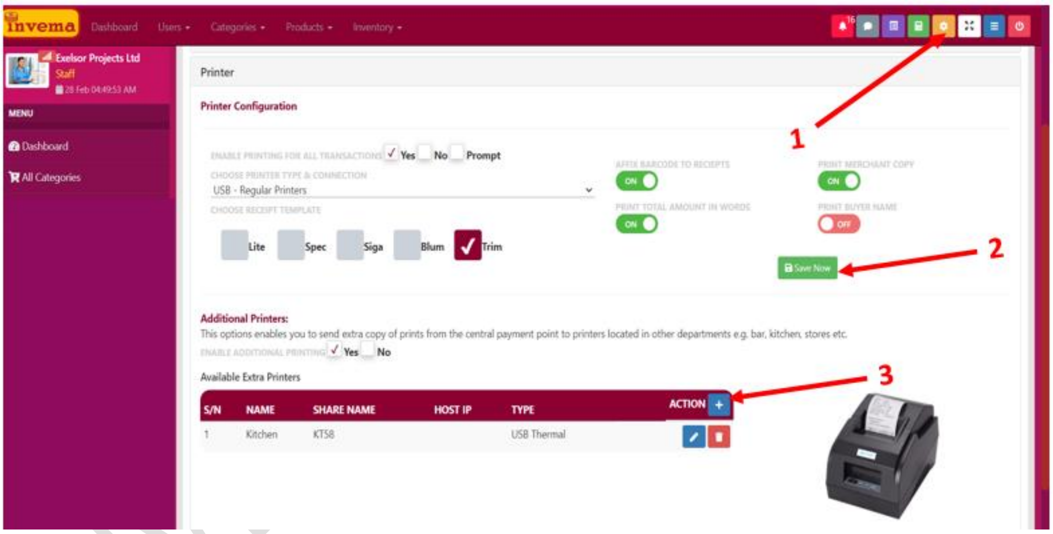


Appearances Customization: Here, users have the ability to customize the appearance and layout of the software interface, such as choosing color themes, background image, login form style, choose image for gallery and select product box design, adjusting font sizes, or rearranging dashboard widgets. After customizing it to your taste, you click on 'Save Appearance' to save your settings.



Printer Configuration: This section in Invema pertains to configuring printers within the system. You select the type of printer and the method of connection you'll be using. This typically involves choosing whether you'll use a thermal printer, inkjet printer, etc., and how it will be connected to the system (e.g., via USB, network connection). Additionally, you can select various options such as whether you want barcodes on the receipt, a merchant copy of the receipt, the amount in words, and the buyer's name on the receipt. Once you've made your selections, you click "Save Now" to apply the changes.

Also, Additional Printers: This allows you to set up additional printers to receive copies of prints from the central payment point. These additional printers could be located in other departments such as the bar, kitchen, or stores. Enabling this option means that extra copies of receipts or other documents can be automatically sent to these designated printers. If you don't need this functionality, you can choose not to enable it.



How to Add and Configure Your Printer

Invema allows printing of receipts via Thermal (Monochrome) Printers or Regular Printers.

How to Configure Thermal Printers

Install the Printer software or download the appropriate one online. We recommend XP-printers.

Printer Sharing needs to be enabled and a share name assigned.

To enable Printer Sharing,

1. From the Windows Search Bar, enter "Printers and Scanners".
2. Locate the printer you just installed (XP-) and right click (Windows 10 and below) or click on chevron-right (>) on the right-hand side.
3. Click on Printer Properties
4. Click on the Sharing Tab
5. Click to enable/change Sharing Options and then tick the 'Share this printer' box.
6. Finally enter a Share name or use the default name. Write down this name or copy it to the clipboard.

Now, you should link this printer to Invema by

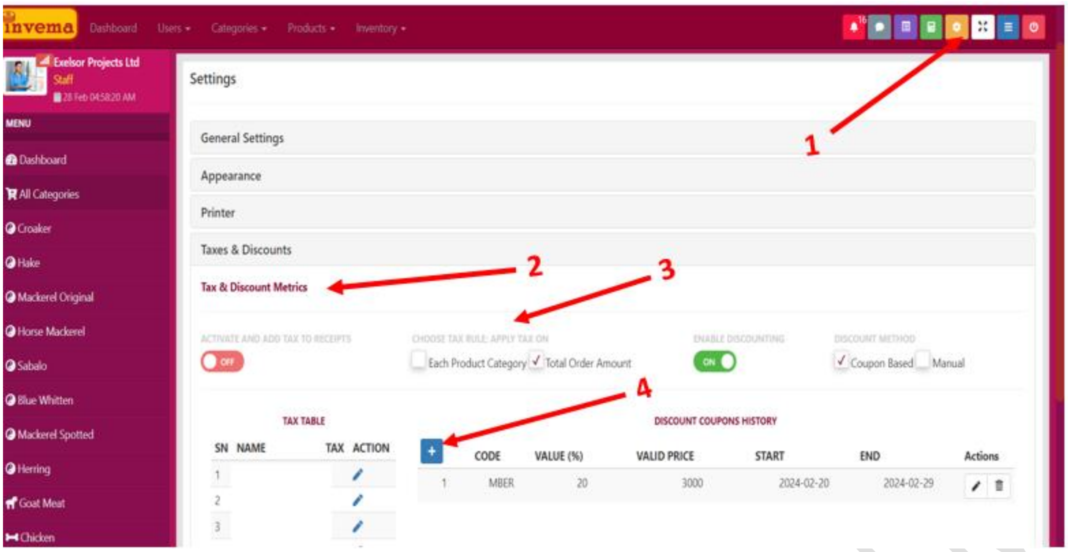
1. Open Printer Settings and Choose USB-Thermal Printers.
2. Choose the Printer Model
3. Type in the Printer Share Name gotten from previous steps.
4. Save the printer configurations and you're done.

Tips for Using Multiple Printers on Invema

Ensure that the computers with the respective printers are connected to one network either wirelessly or wired. Note the IP Addresses of each of them, but if under DHCP, use the computer names as the IP or assigned Static IP addresses.

Follow the steps above to enabled sharing on the printers and then input relevant details into the 'Add Extra Printer' Form.

Taxes and Metrics: This section allows you to configure how taxes are applied to receipts (individually or on the total order) and whether discounts are enabled and, if so, the method of applying them (coupon-based or manual). These settings provide flexibility in how taxes and discounts are managed within the system according to your business needs and practices.



Tax Setup: You have the option to add taxes to receipts or not. This means you can choose whether to display taxes separately on receipts or not show them at all. You can decide whether the tax should apply to products individually or to the total order. This means you can configure whether taxes are calculated based on each item's price or on the total amount of the order.

Discounts: You can enable discounts if desired. You have the option to choose the method of discount application:

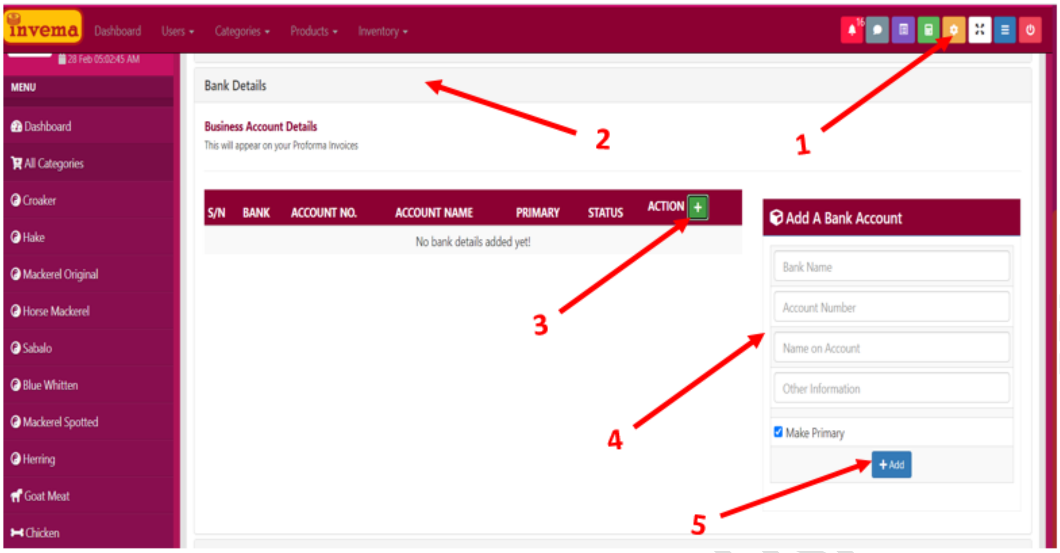
- **Coupon-based Discount:** Discounts are applied through the use of coupons or promotional codes.
- **Manual Discount:** Discounts are applied manually by the cashier or staff.

Bank Details: This allows users to input and store the organization's banking information, such as the bank name, account number, account name, and any other relevant information of the organization. These information once saved is automatically included in proforma invoices. This streamlines the invoicing process and provides buyers with the necessary payment information for completing transactions.

To enter the bank details,

1. Click on 'Settings'
2. Click on 'Bank Details;
3. Click on the '+' sign

4. Enter the bank name, Account Number, Name of Account and other information you desire.
5. Click on 'Add' to save.



System Synchronization & Data Backup: Here we have Server handshake and local/Inter-system Backup.

- **Server Handshake:** This feature allows you to synchronize sales records and settings between online and offline servers. Changes made in either ends will reflect on both ends. This enable business owners or administrators control/manage his business from any location. You can share whatever you did offline to online through here.

How to Synchronize Offline Store to Online Store

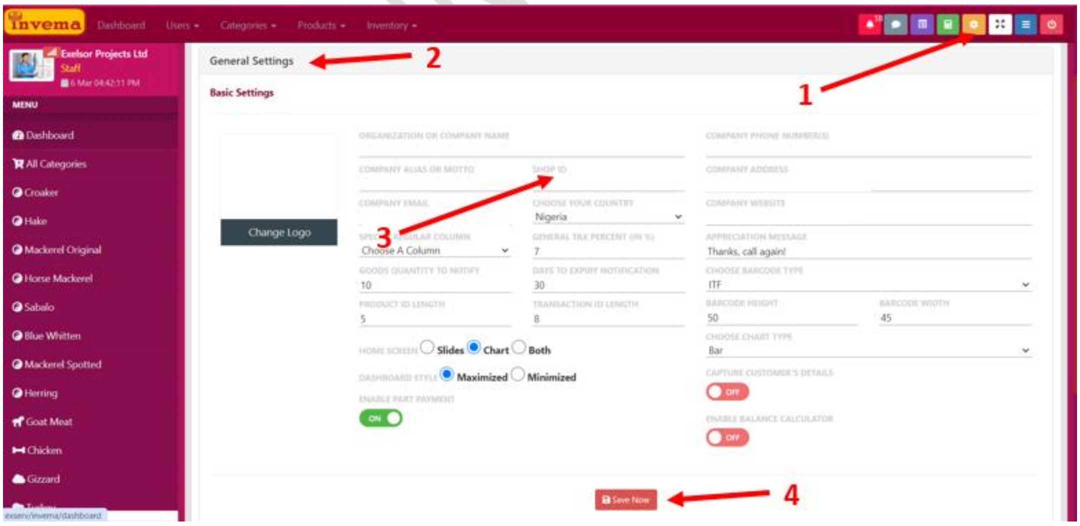
To synchronize offline store to online, you need to buy the business plan (online plan) and after you have paid, you are automatically given a shop ID.

To access your shop ID,

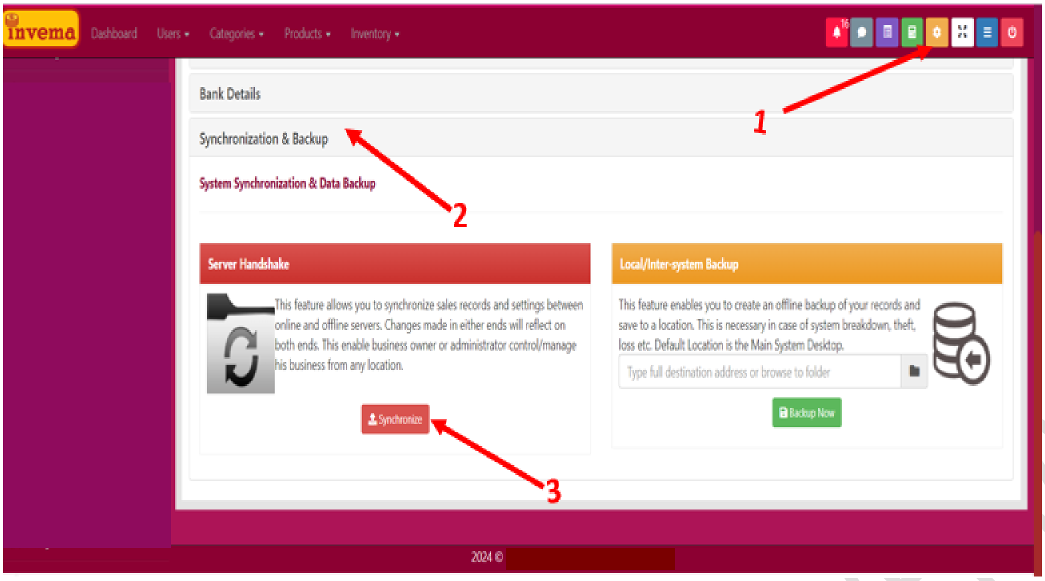
1. Login to the online version
2. Click on the profile or user icon on the right hand side
3. Click on 'Edit Shops'
4. Tap on 'Available Shops'
5. Click on the name of the shop
6. Then the shop ID will display on the page

To synchronize the store,

1. Copy the Shop ID, then go the offline shop
2. Go to ‘Settings’
3. Click on ‘General Settings’
4. Go the place with shop ID and enter the copied shop ID there
5. Click on ‘Save’

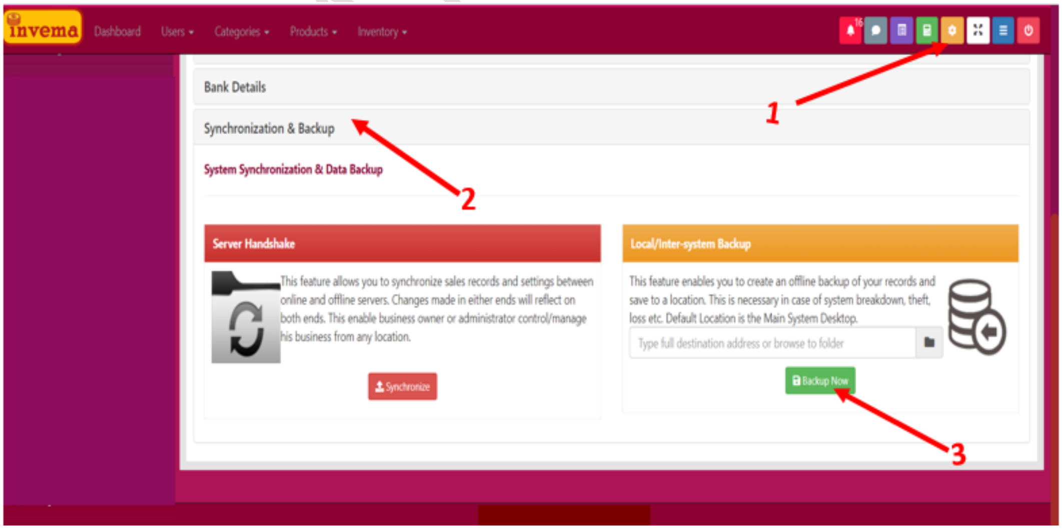


6. Scroll down to system synchronization and backup
7. Click on ‘Synchronize’ and the offline and online store will immediately synchronize



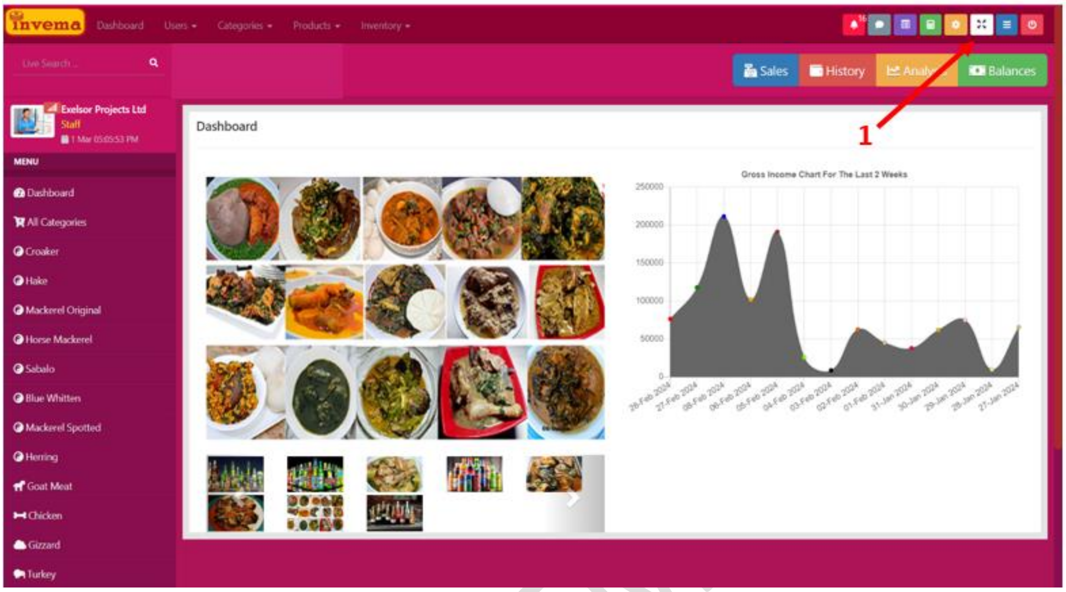
- **Local/Inter-System Backup:** This feature enables you to create an offline backup of your records and save to a location. This is necessary in case of system breakdown, theft, loss etc. Default Location is the Main System Desktop.

  You can generate a backup copy of your data with .ex/extension and from there, you can copy to your storage device. Note that you can backup your data online (cloud) if you are subscribed to the online plan and the plan is active.



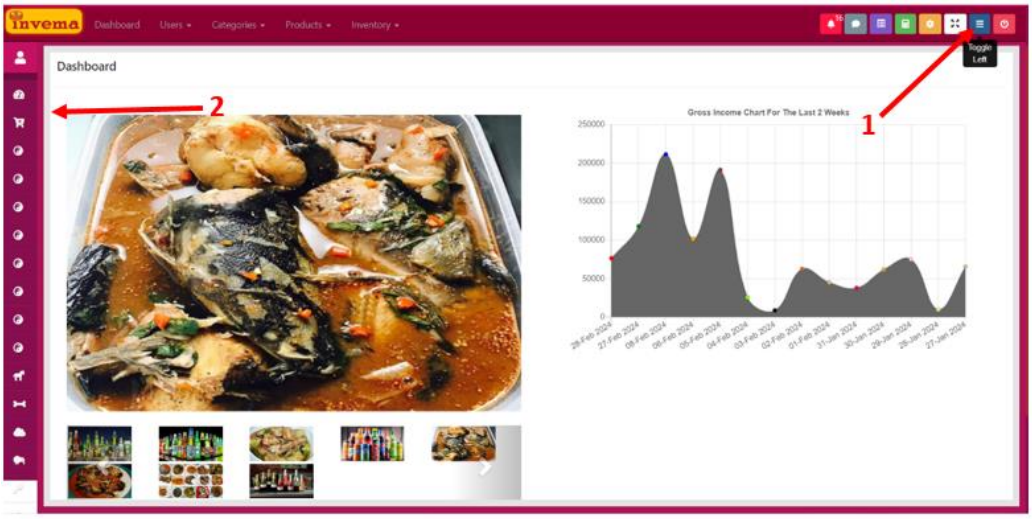
Full Screen

The full-screen icon in Invema software expands the display to cover the entire screen. This feature is crucial as it maximizes visibility and minimizes distractions, allowing users to focus solely on the application's content or task at hand. It enhances user experience by providing a more immersive and efficient working environment.



Toggle Left

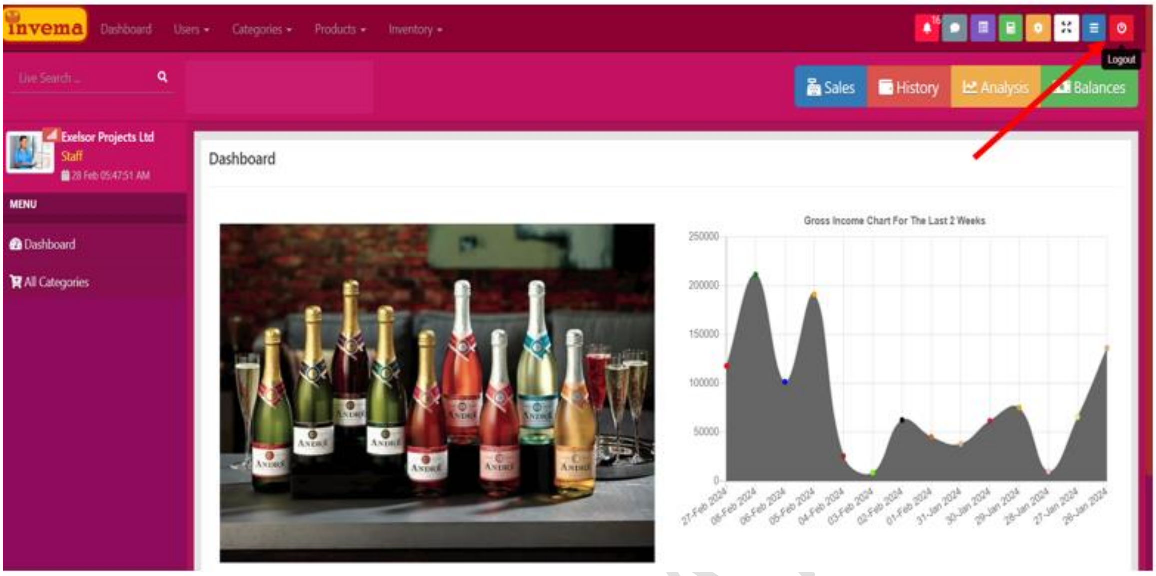
The "toggle left" icon on the Invema dashboard hides the left toolbar, helping users focus on tasks. It makes navigating and manipulating page elements easier, improving overall user experience and productivity.



Log Out

This is how to log out of Invema;

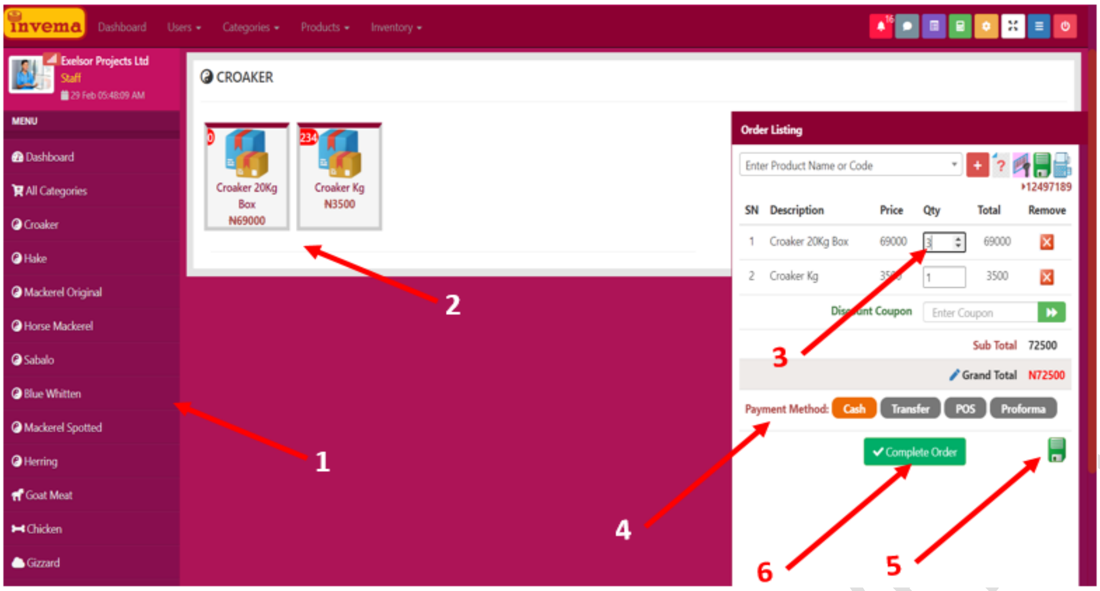
Simply, click on the logout icon, it automatically logs you out of the Invema platform.



How to Sell on Invema

1. From the left side bar, Click on the category the product you want to sell falls under,
2. Click on the products you are about to sell
3. Enter the quantities needed
4. Select the payment method either cash, transfer or POS
5. Once the payment has been made
6. Click on 'complete order' to save and print receipt.

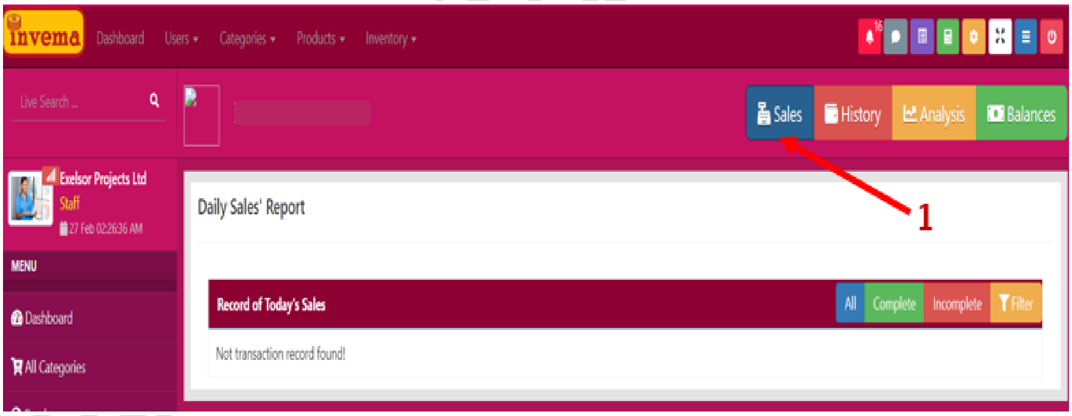
However, if the buyer isn't paying immediately, you can save the order by clicking on the save icon, then return later to complete the order.



How to Access Daily Sales Report

On the right hand side of the inventory software, you will see ‘Sales’

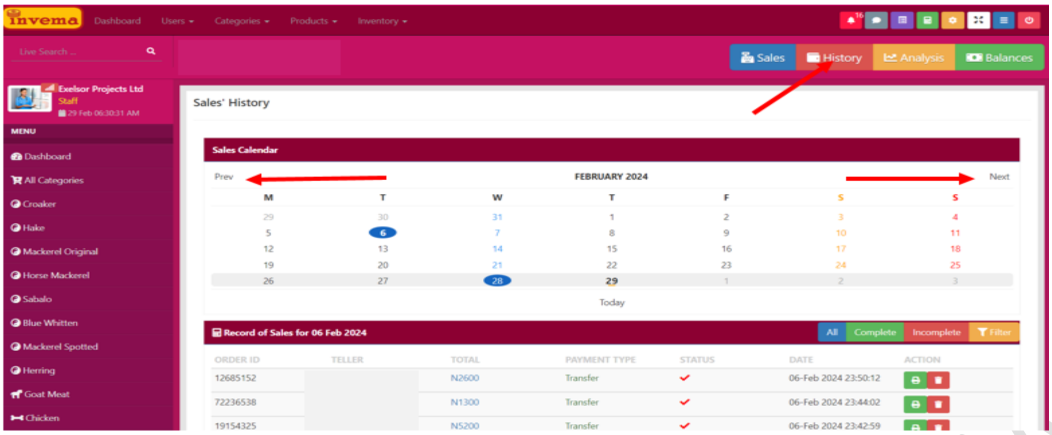
Click on ‘Sales’ and the report will appear, showing the days financial activities, including completed and incomplete transactions.



How to View Sales History

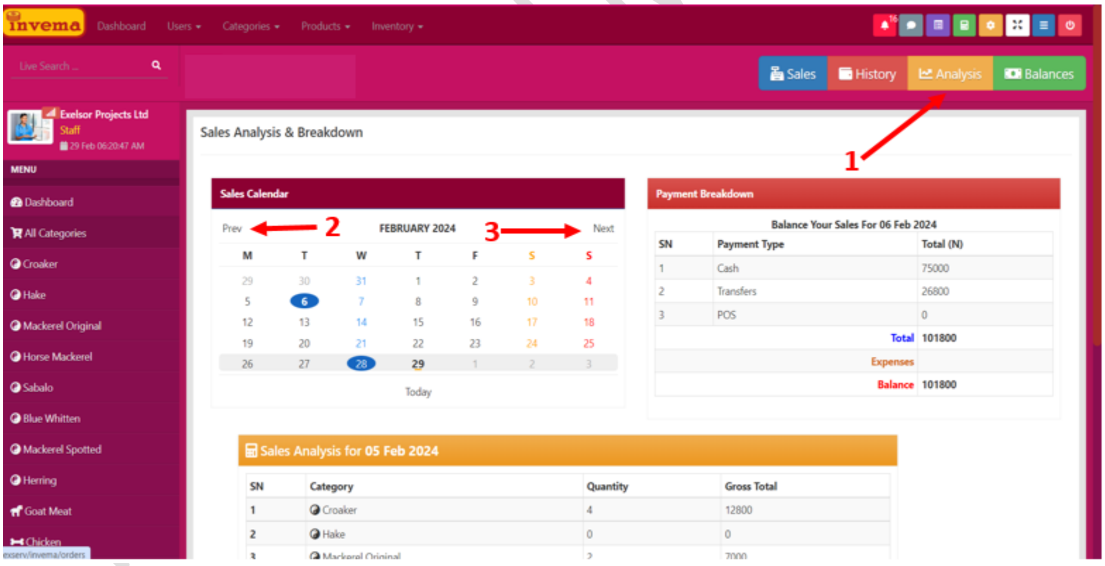
To view sales history,

1. Click on ‘History’
2. Select the date you want
3. If it is in previous months, click on ‘Prev’ or ‘Next’ to get to the desired month,
4. Then select the day and the sales history for that day will appear.



How to Check Sales Analysis

1. To view sales Analysis
2. Click on 'Analysis'
3. Select the date you want
4. If it is in previous months, click on 'Prev' or 'Next' to get to the desired month,
5. Then select the day and the sales Analysis for that day will appear.

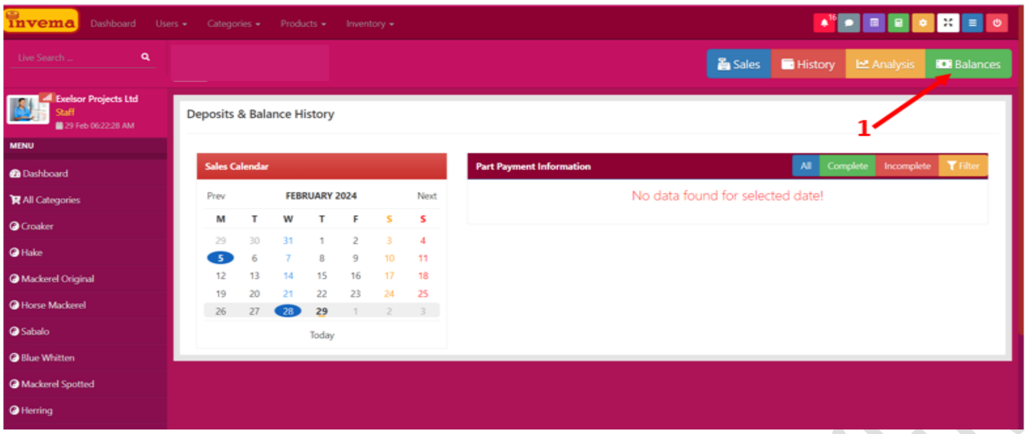


How to Check Balances

To view sales Balances, following these steps;

1. Click on 'Balances' on the right side of the software
2. Select the date you want

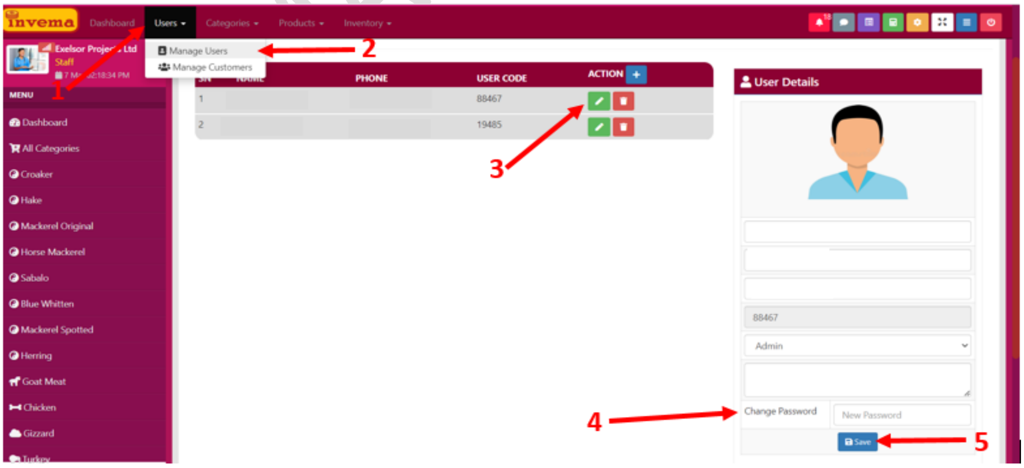
3. If it is in previous months, click on 'Prev' or 'Next' to get to the desired month, then select the day and the sales Balances for that day will appear.



How to Reset Your Password

If you forgot your password or desire to change the one you are using, below are the steps you follow to reset your password:

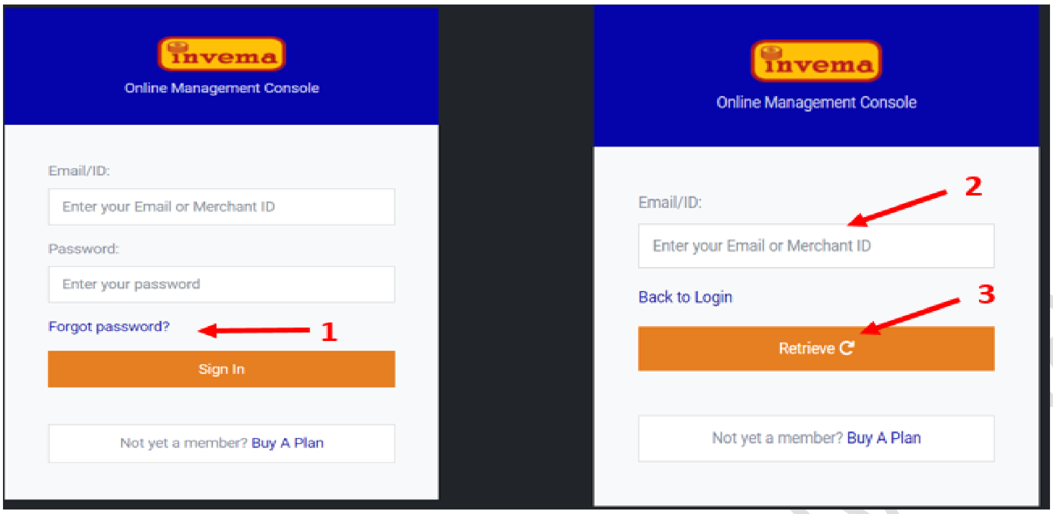
1. For the offline version, Click on 'User'
2. Click on 'Manage User'
3. Click on the edit icon close to the user details
4. Enter the new Password
5. Click on 'Save'



For the online version, follow the step below:

1. From the login Page, Click on 'Forget Password'
2. Enter the email address linked to the software

3. A reset link will be sent to you
4. Follow the prompts to change your password



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