TRAINING MANUAL

YES POS Retail ERP

Outlet & POS Sales Guide — Sipwell Retail

For outlet users and POS sales staff working at the shop terminal.

Sipwell Retail | Point-of-Sale & Retail Management System
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Contents

1. Welcome to the POS

This manual is for **outlet users** and **POS sales staff** at Sipwell Retail. It covers the shop terminal you use every day to sell products, receive stock, look after customers and take payments — the **MicroPOS** screen — plus the mobile POS and the customer feedback page.

You do not need any technical knowledge. If you can use a phone or a browser, you can use the POS. Follow the steps in order and you will be selling within minutes.

> **TIP · What you need**
>
> A device with a browser (till, tablet or phone), your outlet **user name** and **password**, and an internet connection. Your administrator creates your login and links it to your store.

2. Signing In

2.1 Shop / Outlet login. Open the POS address in your browser. On the **User Login** screen:

1. Type your **User Name**.
2. Type your **Password**.
3. Tap **Login**. You arrive at the POS Dashboard or directly at the MicroPOS screen.

> **IMPORTANT · Keep your login private**
>
> Always sign in as yourself and never share your password. Every sale is recorded against the logged-in user, so your login protects you.

2.2 POS Dashboard. The mobile POS dashboard gives you quick tiles for the main areas — **Fast Checkout** (open the POS), **Inventory**, **Customers**, **Reports** — plus a snapshot of the day's **Revenue**, **Transactions** and **Items Sold**. Tap **Open Mobile POS** to start selling.

3. The MicroPOS Screen

MicroPOS is the heart of the terminal. Everything you do at the counter happens here. It is organised into a few tabs / areas:

Area / Tab	What it is for
Sell	Search products, add them to the cart and take payment. Your main selling screen.
Products & Stock	Browse the product list with current stock, prices, SKUs and low-stock flags.
Cart	The current customer's items, quantities, discount and grand total.
Customers	Find or add the customer attached to the sale.
Inward	Receive new stock into the outlet (batch and manufacturing date).
Recent Sales	The sales you have completed — handy for reprinting a receipt.

> **NOTE · Cart is empty?**
>
> A fresh sale always starts with an empty cart. If you see “Cart is empty”, just start adding products — you're ready to sell.

4. Products & Stock

The **Products & Stock** area lists everything the outlet sells. For each item you can see the **price**, current **stock**, **SKU** and a **Low Stock** warning when quantities are running down.

- Use the **search box** to find a product by name or code.
- Watch the **Low Stock** flags — tell your manager so stock can be reordered.
- If a product is missing, it may not be set up or activated yet — ask your admin.

> **TIP · Low stock**
>
> A Low Stock flag doesn't stop you selling, but it's your early warning. Flag it early so the outlet never runs out of a fast-moving line.

5. Receiving Stock (Inward)

When a delivery arrives, record it through **Inward** so your on-hand stock stays accurate. Selling relies on these numbers being right.

1. Open the **Inward** area.
2. Select the product you are receiving.
3. Enter the **quantity** received, the **Batch** and the **MFG Date** where asked.
4. Save. The stock figure for that product goes up straight away, and the receipt shows under recent stock updates.

> **IMPORTANT · Count before you confirm**
>
> Always physically count the delivery against the supplier's note before saving the inward entry. Correcting stock later is far more work than getting it right now.

6. Making a Sale

This is the core task. From the **Sell** screen:

1. **Find the product.** Type its name or code in the search box, or tap it in the list.
2. **Add to cart.** Tap **Add to cart** (or the item). It appears in the **Cart**.
3. **Set the quantity.** Adjust **Qty** if the customer wants more than one.
4. **Repeat** for every item the customer is buying.
5. **Apply a discount or coupon** if applicable (see Section 8).
6. **Attach the customer** (see Section 7) so the sale is saved to their profile.
7. **Check the GRAND TOTAL** with the customer.

8. **Choose the Payment Mode** — Cash, Card, UPI or Credit.
9. Tap **Complete Sale / Checkout**. The invoice is generated and you can print / show the **Receipt**.

Payment modes explained:

Mode	When to use it
Cash	Customer pays with notes/coins. Enter amount tendered; the system shows change.
Card	Debit / credit card via your card machine. Record it as a card sale.
UPI	Mobile payment (QR / UPI app). Confirm the payment landed before completing.
Credit	Amount owed by the customer (where credit sales are allowed). Use per store policy.

IMPORTANT · Confirm digital payments

For Card and UPI, always confirm the payment has actually gone through on the machine / app *before* you tap Complete Sale.

TIP · Reprint a receipt

Need the receipt again? Open **Recent Sales**, find the transaction and reopen its invoice to print or show it.

7. Customers at the Counter

Attaching a customer to the sale builds their history and lets them earn offers, rewards and birthday / anniversary benefits.

7.1 Existing customer. In the **Customers** area, search by **mobile number** or name and select them. Their details attach to the current sale.

7.2 New customer. If they are not found, add them:

1. Choose **New Customer** / **Add Customer**.
2. Enter **Name**, **Mobile**, and **Email** if given.
3. Add **Birthday** / **Anniversary** if the customer is happy to share them.
4. Save. The customer is now attached to the sale and stored for next time.

TIP · Always ask for the mobile number

The mobile number is the customer's ID in the system. Capturing it means they get offers and you get repeat business.

8. Coupons & Discounts

Two ways to reduce a price: a manual **Discount** on the cart, or a **Coupon code** set up by your admin.

1. In the **Cart**, enter a manual **Discount** if store policy allows, **or**
2. Enter the customer's **Coupon Code** and tap **Apply**.
3. The discount / percentage is taken off and the **GRAND TOTAL** updates.

4. Complete the sale as normal.

> **NOTE · Coupon won't apply?**
>
> Check the code is typed correctly, the coupon is **active**, it is within its valid dates, and it is allowed for this customer type (all / new / existing).

9. Customer Feedback & Offers

Sipwell invites customers to rate their visit and claim in-store offers. Customers **scan the feedback QR code** displayed at the outlet, which opens the feedback page for your store on their own phone.

On that page the customer can:

- See the **current offer(s)** for your store — when several are running they appear one after another.
- Enter their **details** (name, mobile, email, birthday, anniversary).
- Fill in **purchase details** and upload the invoice when claiming an offer.
- **Rate their experience** — product quality, brand visibility, outlet appearance, salesman behaviour and product knowledge — and leave a comment.

Your part:

1. Keep the **Feedback QR code** visible and clean at the counter.
2. Politely invite every customer to scan it and share feedback.
3. If a customer is claiming an offer, help them find and scan the code.

> **NOTE · Offers are date-controlled**
>
> An offer only appears while it is within its valid dates, set by your admin. If a customer expects an offer that isn't showing, it may have ended or not started yet — check with your manager.

10. Mobile POS

The same selling tools are available on a phone or tablet through the **Mobile POS**, so you can serve customers away from the main till — on the floor, at events or for home delivery.

- Open the **Mobile POS** from the dashboard's **Open Mobile POS** tile.
- Selling, customers, cart and payment work exactly as on the main terminal.
- The dashboard shows live **Revenue**, **Transactions** and **Items Sold** for the day.

11. Daily Routine & Best Practice

Start of day

- Sign in with your own login.
- Check the feedback QR code is displayed and stock levels look right.
- Record any deliveries through **Inward** before you start selling.

During the day

- Attach a customer (mobile number) to every sale you can.

- Confirm Card / UPI payments before completing the sale.
- Flag any **Low Stock** items to your manager.
- Invite customers to scan the feedback QR.

End of day

- Review **Recent Sales** for the day.
- Hand over cash and reconcile the till per your store's process.
- Log out of the terminal.

12. Quick Troubleshooting

Problem	What to do
Can't log in	Re-check user name / password (watch caps-lock). Ask your admin to reset if needed.
Product not in the list	It may be inactive or not set up. Report it to your admin.
Stock number looks wrong	Make sure the delivery was entered via Inward; tell your manager.
Coupon won't apply	Check spelling, that it's active, in date, and valid for this customer.
Payment didn't complete	Don't retry blindly — confirm on the card machine / UPI app first.
Offer not showing to customer	It may be outside its valid dates. Check with your manager.
Screen frozen / blank	Refresh the browser and sign in again; check your internet.

TIP · When in doubt, ask

If something doesn't look right with money or stock, stop and check with your manager rather than guessing. For technical faults, contact your administrator or Yash Computech support.

End of the Outlet & POS Sales manual. Your administrator has a companion "Administrator & Staff" manual covering the back office.