

STACK APP by Quest Technologies



I. HIGHLIGHTS

- Create / Edit invoices.
- Change invoice status: Paid / Unpaid / Void.
- Add / Edit / Remove clients and products.
- Generate weekly invoice statements.
- Dashboard with relevant sales information at a glance.
- Product management.
- Intuitive user interface.
- Responsive views (desktop and tablet).
- Ready-to-print invoices, statements and sales reports.
- Two types of users available: Administrators and Regular Users.
- Automatic logout after 60 minutes of inactivity.
- Daily database backups.
- Invoices and statements are optimized to print on A4 paper.

II. DEMO ACCESS

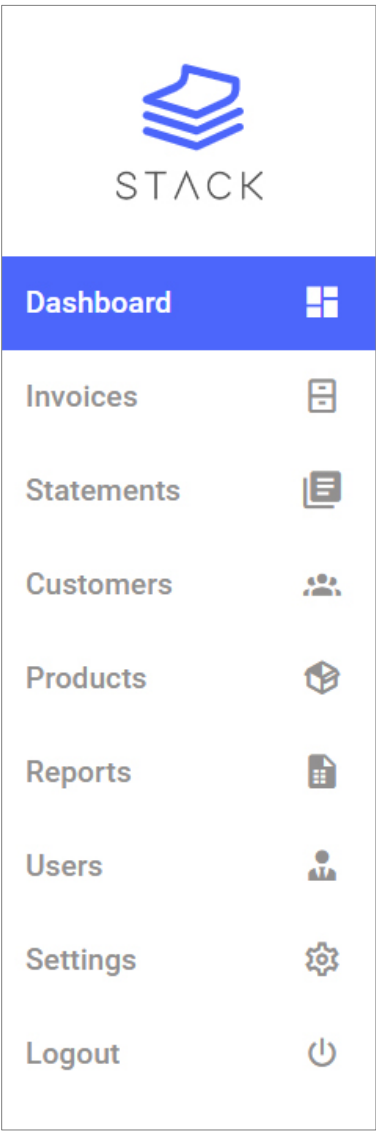
URL: <https://stackapp.net>

Username: Manager

Password: Markets1

III. QUICK GUIDE

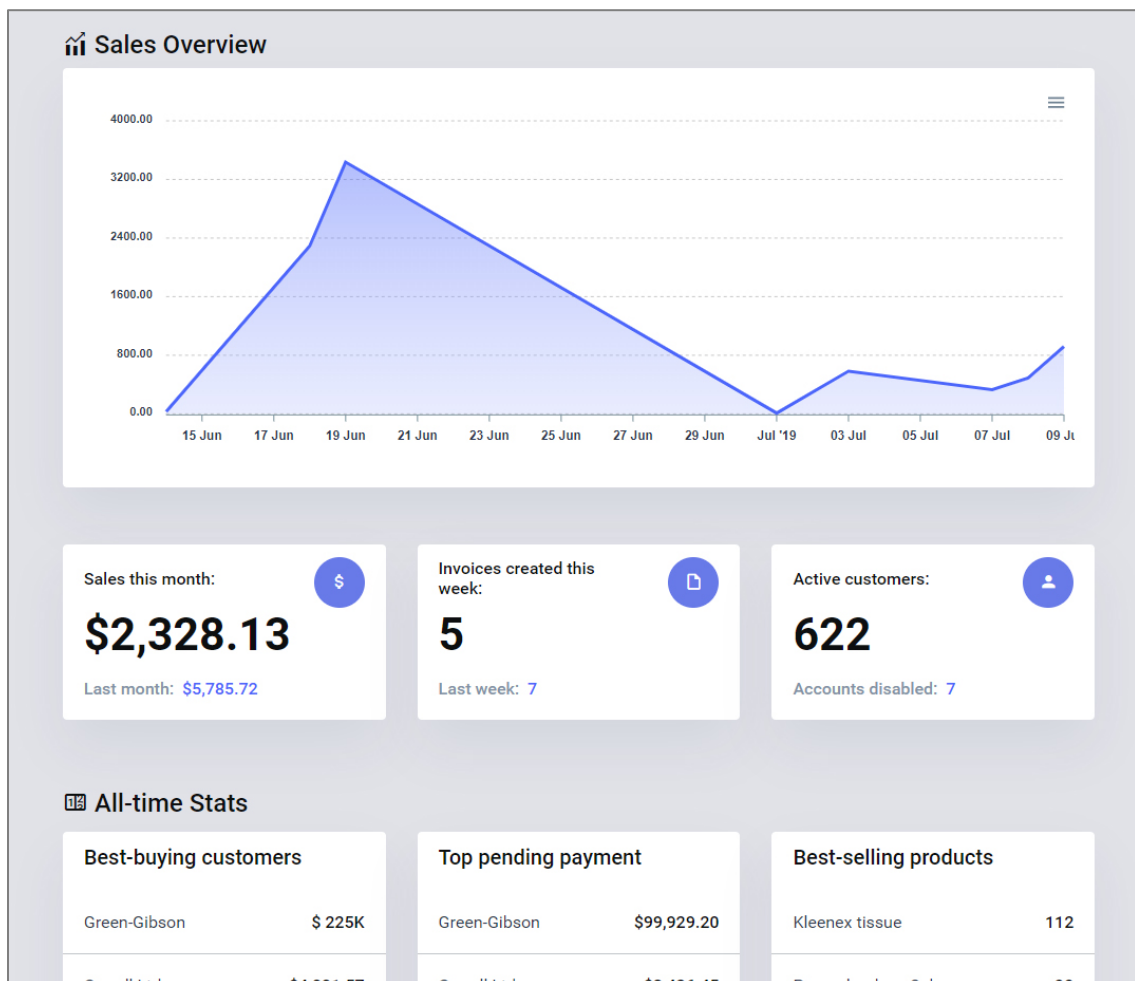
1. NAVIGATION MENU



2. DASHBOARD

The dashboard displays relevant sales information:

- 30-day chart with sales per day.
- Number of invoices created for the current and previous week.
- Number of active / inactive customers.
- Gross sales for the current and previous month.
- All-time statistics: Best-selling items, top customers and top pending payment.



3. INVOICES

On the Invoices page, click on the “New Invoice” button to start working on an invoice for a client. After saving it, you can edit its details, such as:

- Add / Edit / Remove payments and choose date of payment from dropdown calendar.
- Add / Edit / Remove items from the list.
- Change prices per item. The system allows setting three different prices per item; however, on invoice creation, these prices can be overridden via the Override field per invoice row.
- Add notes to the invoice.
- Change status of invoice: Paid, Unpaid, Void. On “Paid”, invoice balance goes automatically to zero, and reverts back to its original balance –if any, if user decides to switch status of invoice back to “Unpaid”.
- Balances are calculated automatically as products are added or modified, as well as payments entered or removed.
- Invoices cannot be deleted. They must remain in the system for the manager’s records. Rather, they will be marked as “Void” and can be re-opened.

The screenshot displays the 'INVOICE # 000035' interface. On the left, there is a sidebar with 'General' and 'Payments & Status' sections. The 'Payments & Status' section shows a status dropdown set to 'Unpaid', a 'TOTAL' of \$970.09, and a 'BALANCE' of \$300.00. The main area contains a table of items with columns for Quantity, Description, Size/Unit, Unit Price, Override, and Total. A summary box at the bottom right of the table shows 'TOTAL \$970.09 balance \$300.00'. At the bottom of the page, there are navigation buttons for 'Cancel' and 'Save', and a footer with 'Logout', a list of other invoices, and pagination controls.

Quantity	Description	Size/Unit	Unit Price	Override	Total
100	66979932932 – PAMONHA DOCE 2PK	2pk	Currently: \$9.99	\$8.88	\$888.00
2	66979932956 – PAMONHA LINGUICA	2pk	Currently: \$9.99		\$19.98
1	650882211058 – RAMIREZ SARDINHA TOMATE PICAN	125G	Currently: \$1.49		\$1.49
1	652010000077 – RED CROSS SALT	26	Currently: \$0.79		\$0.79
1	651013 – VINCENTE BROINHA DOCE		Currently: \$0.85		\$0.85
1	652010000060 – SUPERIOR SALT IODIZED	26	Currently: \$0.99		\$0.99
1	123456666 – FELJAO FARDO	12k	Currently: \$27.99		\$27.99
3	1111116 – IRENE RISSOIS CARNE	12	Currently: \$10.00		\$30.00

4. STATEMENTS

Statements can be generated on a particular day or set of days in a month, as per the user needs.

Statements will compile invoicing information per client in the following way:

- 7-days
- 14-days
- 21-days
- 28-days, and
- 30+ days

with their respective outstanding balances.

CUSTOMER	7 DAYS	14 DAYS	21 DAYS	28 DAYS	30+ DAYS	
Some Good Company	# 000037 Balance: \$0.00	No open invoices	No open invoices	No open invoices	No open invoices	View statement Add/Edit notes
Terry, Graham and Moen	# 000038 Balance: \$95.00	No open invoices	# 000027 Balance: \$6.44	No open invoices	No open invoices	View statement Add/Edit notes
Torphy-Waters	# 000039 # 000045 Balance: \$599.02	No open invoices	No open invoices	No open invoices	No open invoices	View statement Add/Edit notes
Toy Inc	No open invoices	No open invoices	No open invoices	No open invoices	# 000003 # 000004 # 000005 # 000011 # 000014 # 000019 Balance: \$228.31	View statement Add/Edit notes

1 - 19 of 19 records [Prev](#) [Next](#)

5. REPORTS

The reports page offers a convenient way to see all sales generated per customer within a range of dates selected by the user.

Reports can then be printed or saved as PDF or Excel-ready files.

Information included:

- Range of dates
- Date of generation of report
- Number of sales and voids
- List of customers with their respective invoices, amount, balances and date of invoices.
- Total sales, amount invoiced, amount void

Search Sales
From:
Until:
Run report

Sales report on Jul 9, 2019 | From Jul 2, 2019 - Until Jul 9, 2019 | #Sales: 11 (1 void)

[Export to PDF](#)
[Export to Excel](#)
[Print table](#)

Customer	Total invoices	Date	Invoice #	Status	Inv. amount	Inv. balance
Barton, Lockman and Hills	\$133.78	Jul 3, 2019	000041	Void	\$133.78	\$133.78
Bashirian Inc	\$20.00	Jul 3, 2019	000040	Unpaid	\$20.00	\$20.00
Farrell LLC	\$165.73	Jul 7, 2019	000043	Unpaid	\$165.73	\$165.73
Greenholt, Skiles and Kutch	\$199.91	Jul 9, 2019	000048	Unpaid	\$199.91	\$199.91
Marks Group	\$356.17	Jul 8, 2019	000044	Unpaid	\$356.17	\$356.17
Marks-Monahan	\$163.99	Jul 7, 2019	000042	Unpaid	\$163.99	\$163.99
Pollich, Walsh and Botsford	\$354.93	Jul 9, 2019	000046	Unpaid	\$354.93	\$354.93
Terry, Graham and Moen	\$95.00	Jul 3, 2019	000038	Unpaid	\$95.00	\$95.00
Torphy-Waters	\$962.42	Jul 3, 2019	000039	Unpaid	\$465.86	\$465.86
		Jul 8, 2019	000045	Unpaid	\$133.16	\$133.16
		Jul 9, 2019	000047	Unpaid	\$363.40	\$363.40
Amount invoiced:	\$2,451.93					
Amount void:	\$133.78					
TOTAL SALES:	\$2,318.15					

6. ADDITIONAL VIEWS

SETTINGS:

Company Information

Company Name *	<input type="text"/>	Main Phone *	<input type="text" value="123-456-7890"/>	Extension	<input type="text"/>
Address *	<input type="text"/>	Email	<input type="text"/>		
Address line 2	<input type="text"/>	Website	<input type="text"/>		
City *	<input type="text"/>	State *	<input type="text" value="Select ..."/>	Zip Code *	<input type="text" value="00000"/>

Invoice Settings

Display payments on invoice?

Billing terms (this information will appear at the bottom of invoices and statements)

We value your business! Your prompt payment is appreciated.

[Save](#)

NEW PRODUCT FORM:

» New product information - (* denotes required field)

PLU *	<input type="text"/>	
Product name *	<input type="text"/>	Size / Unit <input type="text"/>
Regular	<input type="text"/>	Notes Any additional info here ...
Special	<input type="text"/>	
Promo	<input type="text"/>	

[Cancel](#) [Save](#)

7. CUSTOMIZATION

User can modify the information that goes at the header and footer of the Invoice and Statements, such as:

- Contact information of the company.
- Terms and conditions at the footer.
- Whether or not to show payment details on the printed invoice.

Additionally, we can customize the look of the invoice to the user's needs – black and white, or color.