SWIFT⚡BOOKS

USER
GUIDE

WELCOME TO OUR COMPANY

Welcome
Message

What is Swiftbooks?

Swiftbooks Sales and Accounting has formally been launched Worldwide but tailored to developing countries. Swiftbooks is a cloud Sales management tool aimed at growing and protecting businesses and is specifically designed and customized to the developing nations market.

The software has been launched in the form of an App and desktop application designed at monitoring all aspects of distribution, retail, wholesale and field sales businesses. The application which has been years in the making is aimed at delivering accessibility for many businesses who cannot afford enterprise level technology.

About Swiftbooks

The development of app involved a collaboration of 22 developers who had experiences in running businesses in developing nations including those working in the informal sector.

The development relied on remote communication and asana based task management.
It has also been tailored to help businesses target business pit falls and ensure business owners do not lose money. The reports also highlight the areas in the business that make more money and how to capitalize on this to increase profit.

Navigating Swift ⚡Books Features
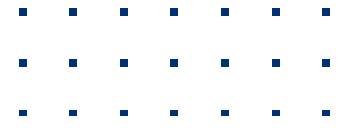
The menu can be accessed by swiping or sliding the slider from Right to Left , The Tabs contain all the features you need to set up and use swiftbooks efficiently.

Update Profile   My orders
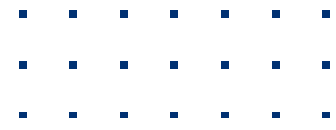
Request Order   Articles & Video   Warehouse Stock   View Invoices

The Manager user can also limit access to some of these tabs using the user permission settings when creating users. This ensures the user sees only what the manager deterimines based on their role .

Navigating Swift ⚡Books Features

Invoicing Feature

- *Create Professional looking Invoices*
- *Unlimited Users, Unlimited Number of Transactions , Unlimited Branches for Point of Sales Till*
- *Mark Transactions as Paid, Partially Paid or Unpaid*
- *Send Invoices via Whatsapp or Email Directly to Your Customers*

Mobile Phone	0545656231
Email	Testuser@costsavers.com
Full Address	Accra, Ghana

COSTSAVERS GH (Phone 00233500408921

Address: Bonsu Road, Accra, Ghana

Test Prd

4   cart (GHS 400.00)

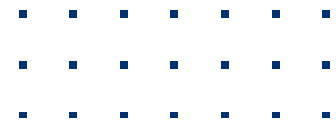**Total Amount GHS 400.00**

Edit   Print   Approve   Edit price   Cancel
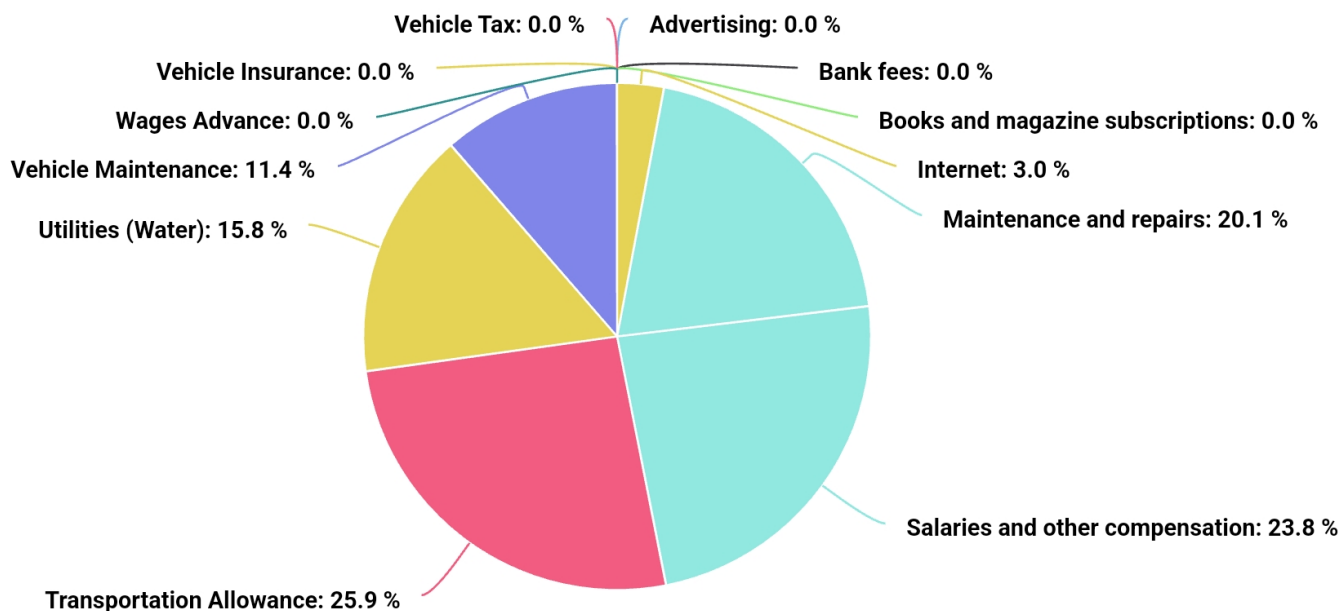
Send via Email   Send via Whatsapp

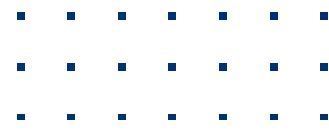# Navigating Swift ⚡Books Features

Bookeeping Features

- *Bookkeeping: manage daily transactions*
- *Clock in Feature: Clock in and Clock out Feature for Employees*
- *Field Sales Feature to manage an unlimited number of field sales team*
- *Planning: Reporting and advice to support growth*
- *Expenses: Record and track expenses*

EXPENSES

Vehicle Tax: 0.0 %
Advertising: 0.0 %
Vehicle Insurance: 0.0 %
Bank fees: 0.0 %
Wages Advance: 0.0 %
Books and magazine subscriptions: 0.0 %
Vehicle Maintenance: 11.4 %
Internet: 3.0 %
Utilities (Water): 15.8 %
Maintenance and repairs: 20.1 %
Salaries and other compensation: 23.8 %
Transportation Allowance: 25.9 %

Total Amount: GHS 19,760.44

Navigating Swift ⚡Books Features

Point of Sales System

- *POS: Advanced point of sales system for your Business.*
- *Barcode Scanning Feature: Barcode Scanning Feature for Point of Sale Branches*
- *Store Hours: Ensure your shop is opened and closed on time by using our store clock in feature which works only at the geographical location of the Store.*
- *POS Reports: Tally your end of day sales effortlessly with our Pos reports*

Swift ⚡ Books   Manager | Robert (General Manager) | 12 Jul 02:03

Evaporated Milks	Milo Products	Cerelac Products	Nescafe Products	Powdered Milks
Nido Products	Maggi Products	Confectionary	Infant Formula	Drinks
Test Products				

Ideal Mini Carton	Carnation Tea Creamer	Ideal Evaporated Milk 150g Carton	IDEAL ORIGINAL Evp Milk (11+1)x390g	IDEAL ORIGINAL Evp Milk 370g Carton
GHS 228.00 🟢	GHS 100.00 🔴	GHS 119.00 🟡	GHS 83.00 🔵	GHS 380.00 🟢

Carnation Mini 29g	Carnation (48 Pack)	Ideal Milk 150g (6x8) Pack	Popular Milk
GHS 303.00 🔴	GHS 294.00 🟡	GHS 0.00 🔵	GHS 155.00 🟢

👤 Customer 🔍

Test

Product name	QTY	Each	Total
Milo 800g Soft Pack Carton	1	GHS 560.00	GHS 560.00
Ideal Milk powder 26g	1	GHS 29.70	GHS 29.70
IDEAL ORIGINAL Evp Milk 370g Carton	1	GHS 400.00	GHS 400.00

Item	3	Total	GHS 989.70
Basket Discount	GHS 0.00	Due	GHS 0.00

DELETE   **NEW TRANSACTION**   **PAY**

Navigating Swift ⚡Books Features
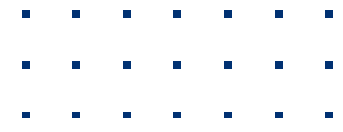
Loyalty Card Reward Feature

- *Loyalty: Bulit in Loyalty Reward Program with digital loyalty card for customers*

- *Discounts: Our Timed Discount Program allows you to run specific discounts at certain periods and based on stock availability.*

- *Discounts can be given based on quantity of stock so inventory is managed well*

Navigating Swift ⚡Books Features
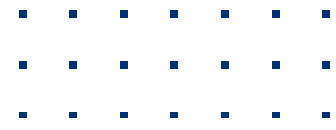
Reports

- *Reporting: Help directors make informed decisions*
- *Export: In Depth Business Reports easily exported to PDF,CSV & Whatsapp*
- *Targets: Monthly Target Feature to Monitor Sales Performance of Stores or Sales Teams*
- *Dashboard: Business Dashboard to See Your Business Health at a Glance*

2%
GROSS MARGIN

GHS 29,316.35
GROSS MARGIN AMOUNT
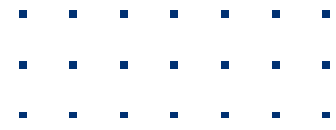
COMPANY TARGET
GHS 4,520,000.00

37%
ACHIEVED

TOTAL SALES GHS 1,689,152.66

GHS 29,316.35
OPERATING PROFIT/LOSS

Navigating Swift ⚡Books Features

Reports

| Create POS Users | POS User Report | POS Discount Report | Loyalty card | Loyalty card settings | Loyalty Statistic | Exclusive Discounts |

This Month

INVOICES

GHS 2,566,116.00 Unpaid

| GHS 1,942,436.00 | GHS 623,680.00 |
| Overdue | Not due yet |

EXPENSES

GHS 0.00

PROFIT & LOSS

GHS 29,316.35
Net Income For July

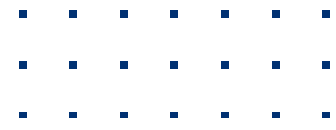**GHS 29,316.35**
operating profit/loss

GHS 0.00
Expenses

SALES

GHS 1,689,152.66

GHS1200000
GHS800000
GHS400000
GHS0
W1 W2 W3 W4

Total Sales By Store/Sales Users
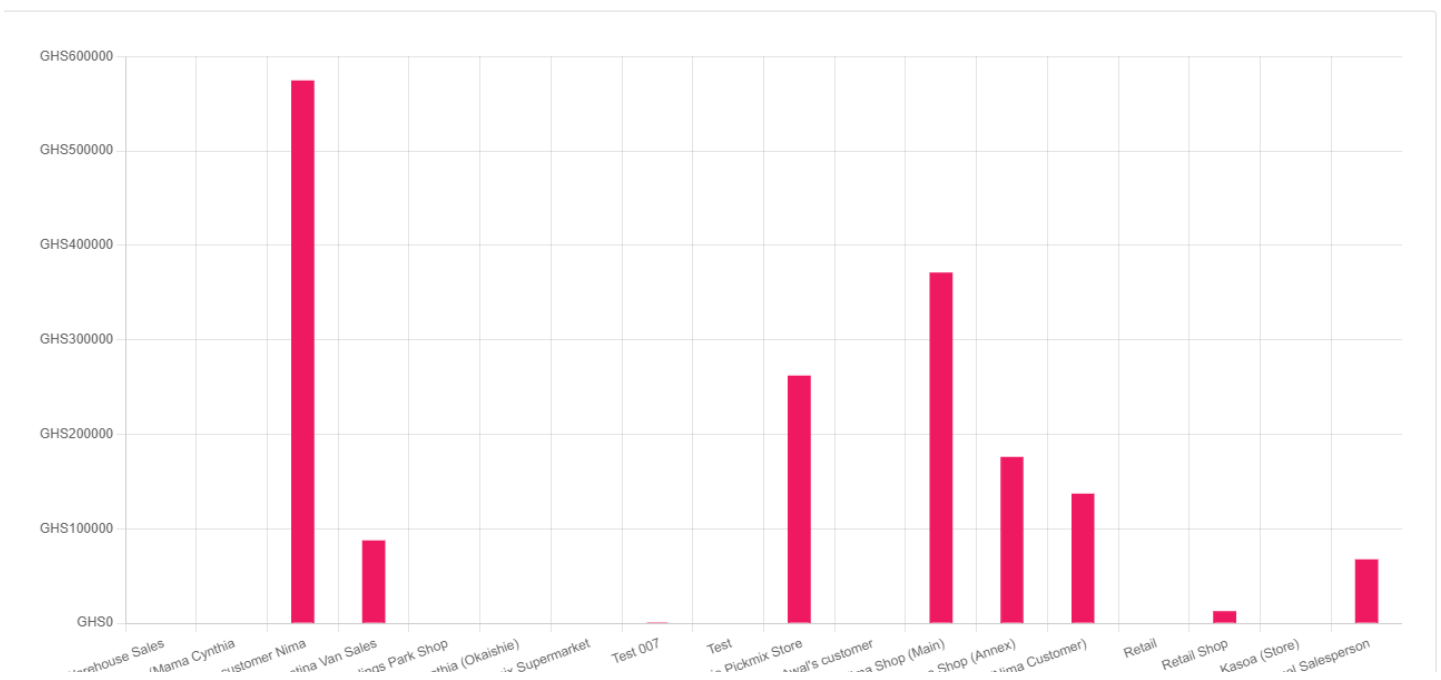
# Navigating Swift ⚡Books Features

Expiry Alert Feature

The Swifbooks Expiry Feature allows you to see every expiry for each item in your warehouse and all your stores or sales vans. This helps you to avoid wastage so you can process items closer to expiry, This information is presented in the main dashboard as soon as you open the app as well the report section.

Say Goodbye to expired items!!

Expiring Items

| 30 DAYS | 60 DAYS | 90 DAYS | 6 MONTHS |
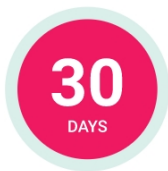
Item	Quantity	Batch Number	Expiry Date	Days left to Expiry	Users Warehouse
Carnation	50	5672811	11-07-2023	14 days	Nima Main
Carnation	27	5672819	17-07-2023	21 days	Awal Customer
Carnation	32	5672811	11-07-2023	14 days	Nima Annex
Total	**109**				
Ideal Milk	1156	3672811	11-07-2023	14 days	Main Warehouse
Ideal Milk	90	2672819	17-07-2023	21 days	PickMix
Ideal Milk	78	4672811	11-07-2023	14 days	Nima Annex
Ideal Milk	45	3456718	27-07-2023	18 days	Faustine Sales User
Total	**1369**				

Navigating Swift ⚡Books Features
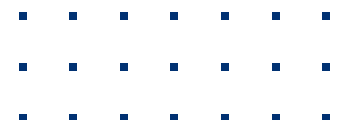
Monthly Sales Target Feature

Monitor the performance of your field sales team or store by utilizing the monthly sales target feature.

The targets for each user appears in the main dashboard and also in the users interface when logged onto the system.
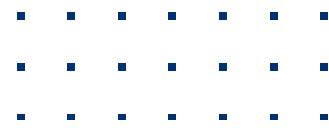
An automatic reported is generated based on the users performance and a daily notification is sent to both the manager and user based on the current progress with regards to the target.

Salesforce Performance

#	User Name	Target	Target Remaining	Performance	On Track
1	Nima Shop (Main) (Store User)	GHS 800000	GHS 0	Achieving 🟢	Yes
2	Awal's customer Nima (Store User)	GHS 1450000	GHS 0	Achieving 🟢	Yes
3	Nima Shop (Annex) (Store User)	GHS 550000	GHS 101492	Failing 🔴	No

Navigating Swift ⚡Books Features

Automatic Re-Ordering Feature

Have you ever had to keep reminding your team to put through their orders and run the risks of low stocks in your shops, stores or sales vans?

Our New Automatic Re-order feature takes care of that, you simply need to define the level of stock you would like to keep in your shop so our system will automatically re-order for that item when it falls below that level. You can actually replenish it daily without the hassle of checking and manually calculating and then doing the invoice.

AUTOMATED ORDERING SYSTEM
to streamline sales order fulfilment

Navigating Swift ⚡Books Features

Pharmacy Mode

Pharmacy Mode is a brand new exciting feature designed for pharmacies and healthcare shops. The Pharmacy mode when enabled allows your pharmacy to identify all possible interactions between the medications being dispensed and sold and automatically prints guidance for each medication on the receipts. This allows the customer to benefit from good advice to ensure that they benefit in the direction of usage of the medications. The interactions tool prevents medications which may cause adverse effects when taken together to avoided at the point of sale.

Contact
Information

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