Metastore App ERP

User Guide

Basic & Standard Plans · Version 1.5.0

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Features marked [Standard] are available on the Standard plan. On Basic they are visible but locked, and clicking them offers an upgrade. This guide covers version 1.5.0.

1. Getting started

Metastore App ERP runs on your Windows computer and works fully offline — no internet is needed for daily selling.

- On first launch, enter the licence key from MGS and click Activate.
- For a PC-locked key, the screen shows This PC ID — send it to MGS to receive your key.
- **No key yet?** Start the **7-day free trial** (full Standard features) right from the activation screen. A countdown shows the days left on every page.
- **Need a key, a trial, or an invoice?** The activation screen has **WhatsApp (+234 905 960 1079)** and **admin@mgssolution.com** buttons — tap to reach MGS instantly.
- Choose a colour theme, then enter the shop.

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The activation / licence screen — key entry, This PC ID, 7-day free trial, and WhatsApp/email contact buttons.

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Licence types

- **Subscription (time-limited):** valid for a set number of months (e.g. 12). The app shows the expiry date in Setup & Licence and reminds you as it approaches.
- **Lifetime:** never expires — Setup & Licence shows **Lifetime** instead of a date. Lifetime machines are not auto-updated; when a new version exists they are notified and can request the upgrade from MGS (see section 15).
- **Generic vs PC-locked:** a generic key runs on any PC (within its seat count); a PC-locked key is tied to one computer's PC ID.

Set up your business (Settings)

- **Business name, type, address, phone and logo** — these print on receipts.
- **Your name** — used only for the dashboard greeting and your avatar (never on receipts).
- **Font size and colour theme** — applied instantly, per computer.
- **POS & payments** — set the default payment method (Cash, POS or Transfer) that pre-fills on every sale.

Choose your display currency

Metastore App ERP works in any country's currency. Open Setup & Licence → Currency and pick your currency from the list (₦ NGN, $ USD, € EUR, £ GBP, ₵ GHS, KSh KES, R ZAR, CFA, ₹ INR and many more), or choose Custom symbol to type your own.

- The chosen symbol is used everywhere — POS, receipts, inventory, reports and the dashboard.
- *Changing the currency only changes the symbol shown — your existing prices and figures stay the same numbers (it does not convert amounts).*

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Setup & Licence → Currency: the currency dropdown with a live example of how prices will appear.

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Important: back up regularly — Settings → Backup now → save the file to a USB drive.

2. Signing in and staff accounts

- **Basic:** no sign-in — the app opens straight to the dashboard.

- [Standard] On the first Standard launch you create the **Owner** account (name + 6-digit PIN). After that each launch shows the staff picker — choose your name and enter your PIN.
- **Lock screen** (avatar menu) hides the app; resume within 120 seconds needs nothing, after that your PIN is required.
- **Log out** ends your session and returns to sign-in.

3. Home (dashboard)

- Choose a period: Today, This week, This month, This year or a custom date range.
- See Sales, Gross profit, Cash received and Items in stock for that period.
- When there are refunds in the period, a **Net after refunds** figure appears under Sales and Gross profit.
- Alerts show out-of-stock, low stock, expiring items and unpaid balances.
- [Standard] Sales & profit trend and Sales-by-category charts fill with your live data.
- **Cashiers** see only their own figures; Managers and Owners see everything.

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The Home dashboard — period selector, KPI cards (Sales, Profit, Cash, Items), alerts and charts.

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4. New Sale (POS)

- Search for a product, or scan its barcode and press Enter — it drops into the cart.
- **Units:** if a product has bigger units (e.g. Carton, Pack), you're asked how it is being sold and the right price and stock are used.
- Use minus / plus to change quantity; x removes a line. VAT is added only for VAT-marked products.

Payment — the smart split

- The full total is pre-filled in your **default payment method**. A normal full sale is one tap.
- Type an amount in another method and the default box **auto-balances**: e.g. total ₦3,000, type ₦1,000 in POS and Cash drops to ₦2,000.
- Over-payment shows as **Change to give**. Only the amount kept is recorded — the change is not counted as cash received, and it prints on the receipt (Cash tendered / Change given).
- **Part-payment** — type a smaller amount in the default box to leave a balance owed (a debtor). [Standard] Cashiers/Managers can only take part-payments if the Owner has granted it on their staff profile.
- [Standard] Tap the customer chip to attach the sale to a customer (with inline search), or add a new one.
- Complete & Print produces the receipt, showing the staff who served.

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New Sale (POS) — product search/scan, the cart, and the smart split-payment panel.

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5. Inventory

- Add a product, or use Import to load many from the CSV template (Template gives you the file).
- Set **cost and sale price per base unit**, category, re-order level, and tick VAT if it applies.
- **Bigger selling units:** add Carton/Pack with how many base units it holds and the price of the WHOLE unit. The app warns if a price is below cost.
- **Batches & expiry:** record each purchase as a batch with its expiry. The earliest-expiry batch sells first, and expiring/expired items are flagged.
- **In store vs On shelf:** stock is split between the back store and the shelf; Shelf moves stock forward.
- **Barcodes:** every product gets a scannable barcode automatically; you can type the real one to overwrite it.

- [Standard] **Brands & Categories** — manage a reusable, searchable list of brands (with import) and add your own categories, to avoid typos and duplicates.
- [Standard] **Dispose / write-off** — remove expired or damaged stock with a reason; it reduces inventory and records the loss (at cost) in Reports.
- Once stock has been sold or written off from a batch, that batch can no longer be deleted (to protect your records).

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The Inventory page — product list with stock levels, and the Add/Edit product form (prices, units, batches, VAT).

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6. Sales & Receipts

- Every sale is listed; click Receipt to reprint (it shows the change given, too).
- A **VAT** column and a VAT-collected total help you see the output VAT on sales.
- [Standard] Search by receipt number or customer, and filter by staff (Manager/Owner).
- **Debtors panel:** customers who owe a balance — click Settle to record payment.

7. Customers [Standard]

- Add customers with name, phone and an optional note (and a refill/follow-up date for pharmacies).
- Cashiers can **add** customers but cannot edit them — only a Manager or Owner can edit or delete.
- See each customer's sales, revenue and (for Owner/Manager) gross profit — with a net-after-refunds figure when they've had refunds.
- Select a customer at checkout so the sale and any balance is tied to them.

8. Returns & Refunds [Standard]

- Enter the original receipt number and click Find.
- Set the quantity to return per line — the refund total updates as you type.
- Choose Cash or Store credit, and whether the items go back into stock.
- A manager PIN approves the refund. **Restocked** returns reverse the cost (a full return nets to zero); non-restocked returns count the cost as a loss.
- Refunds reduce the Net sales and Net profit shown on the dashboard, customers and reports; reward points earned on the refunded value are reversed.

9. Expenses & Accounts

- Click + Record to log an expense: description, category, amount and Paid by (Cash, POS or Transfer).
- The summary shows sales, cost of goods, gross profit, expenses and net profit.
- **Money in handVAT collected (to remit)**.

10. Reports & Analysis [Standard]

Available to Owner and Manager.

- Pick a period (Today, This month, Last month, This year or a custom range).
- Review Profit & Loss (with net-after-refunds and VAT collected), payments received, sales by staff, by category and by brand, top products, and stock write-offs.
- **Download Excel** (CSV) or **Download PDF** for a formatted financial report with your logo. In the print dialog choose Save as PDF.

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Reports & Analysis — Profit & Loss, payments, sales by staff/category/brand, and top products.

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11. Staff, roles & audit [Standard]

- **Owner** — full access, including staff and settings.
- **Manager** — operations, inventory, returns, expenses and reports.
- **Cashier** — sales only, and sees only their own sales.
- **Per-staff part-payment:** on each staff profile the Owner can allow or restrict taking part-payments — grant one cashier and restrict another.
- **Audit trail** — logins, sales, refunds, product/price changes, customer add/edit/delete, expenses and settings, with search, date filter and 100 rows per page. Exportable to Excel.

12. More than one till (Network & Multi-PC) [Standard]

Run several tills in one shop sharing one live database — the Main PC holds the data, the tills connect to it.

Set it up

- **Main PC:** Settings → Network & Multi-PC → choose Main PC. Note the address, port and access code, Save, then click **Allow through Windows Firewall** and approve the Windows prompt.
- **Each till:** set up as Till, enter the Main PC's address, port and access code, give the till its own name (e.g. Cashier 1), Test, then Connect.
- Keep every computer on the same Wi-Fi — not a Guest network — and one that lets devices see each other.

Day to day

- Tills keep selling even if the network drops, and sync when it returns. The Main PC assigns receipt numbers and applies stock, so nothing clashes — even the Main PC can sell at the same time as the tills.
- The Tills connected list on the Main PC shows each till and whether it's online; use Refresh to update it.
- If a till says **Could not connect / fetch failed**, click Allow through Windows Firewall on the Main PC and check both are on the same Wi-Fi and the address/port/code match.

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Settings → Network & Multi-PC — role selector (Main PC / Till), address, access code, and the Tills connected list.

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13. Customer rewards [Standard]

- Customers earn points as they spend; points can be redeemed at checkout.
- Tiers (e.g. Bronze/Silver/Gold) are reached by net spend and can carry a discount; visit stamps and refill reminders are supported.
- Refunds correctly reduce points and spend so tiers stay accurate.

14. Barcode labels [Standard]

Print shelf and price labels for your products so they can be scanned at the till.

- Open **Barcode Labels** from the menu and search for products by name, brand or barcode.
- In the **LabelsClear** resets the selection.
- Any item without a barcode shows a **Generate** button — click it to create an internal EAN-13 barcode for that product.
- Click **Print / Previewname, price and a scannable barcode**.
- Load your label paper (or plain A4) in the printer and print. Labels are sized to fit standard label sheets; in the print dialog you can also choose Save as PDF.
- Tip: generate internal barcodes for items that came without one, print the labels, and stick them on the products — the same barcodes then scan instantly at New Sale.

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Barcode Labels — product search, the Labels quantity column, and the printable label sheet preview.
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15. Software updates & rollback

Subscription licences

- The app checks for updates automatically and installs them in the background (tills update themselves; the Main PC prompts the owner).

Lifetime licences

- Lifetime machines are **notified when a new version is available** but do not download or install it automatically.
- To upgrade, click **Request upgrade** on the notice (Settings or the on-screen bar). It opens WhatsApp with your details pre-filled so MGS can arrange the new version. You can also email admin@mgssolution.com.
- *This lets you stay on the exact version you rely on, and take new versions only when you choose.*

Both

- Settings shows the version this computer is running. **Restore previous version** rolls a PC back to the last version if an update causes problems — your data is kept.

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Settings → Software updates — the version, the update notice, and (on lifetime machines) the Request upgrade button.
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16. Backup & safety

- Your data lives on the computer (the Main PC in a multi-till shop). Back it up often.
- **Settings → Backup now** saves a single file; keep it on a USB drive. Restore loads a backup and replaces current data.

Uninstalling clears this PC's local data (so a reinstall starts fresh) — back up first if you need the data.

17. Support

For help, a new licence, a lifetime upgrade, an invoice, or to report a problem, contact Metaware Global Solutions (MGS):

- **WhatsApp:** +234 905 960 1079
- **Email:** admin@mgssolution.com
- **Website:** mgssolution.com

Tip: the activation screen and Setup & Licence page have one-tap WhatsApp and email buttons, so you can reach MGS without leaving the app.