

Sales

Sales Module

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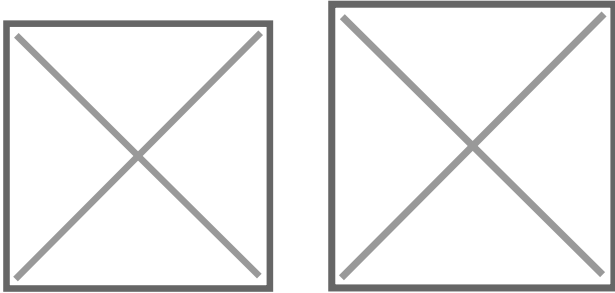
Reminders/Notes

Reminders/Notes

Reminders / Notes

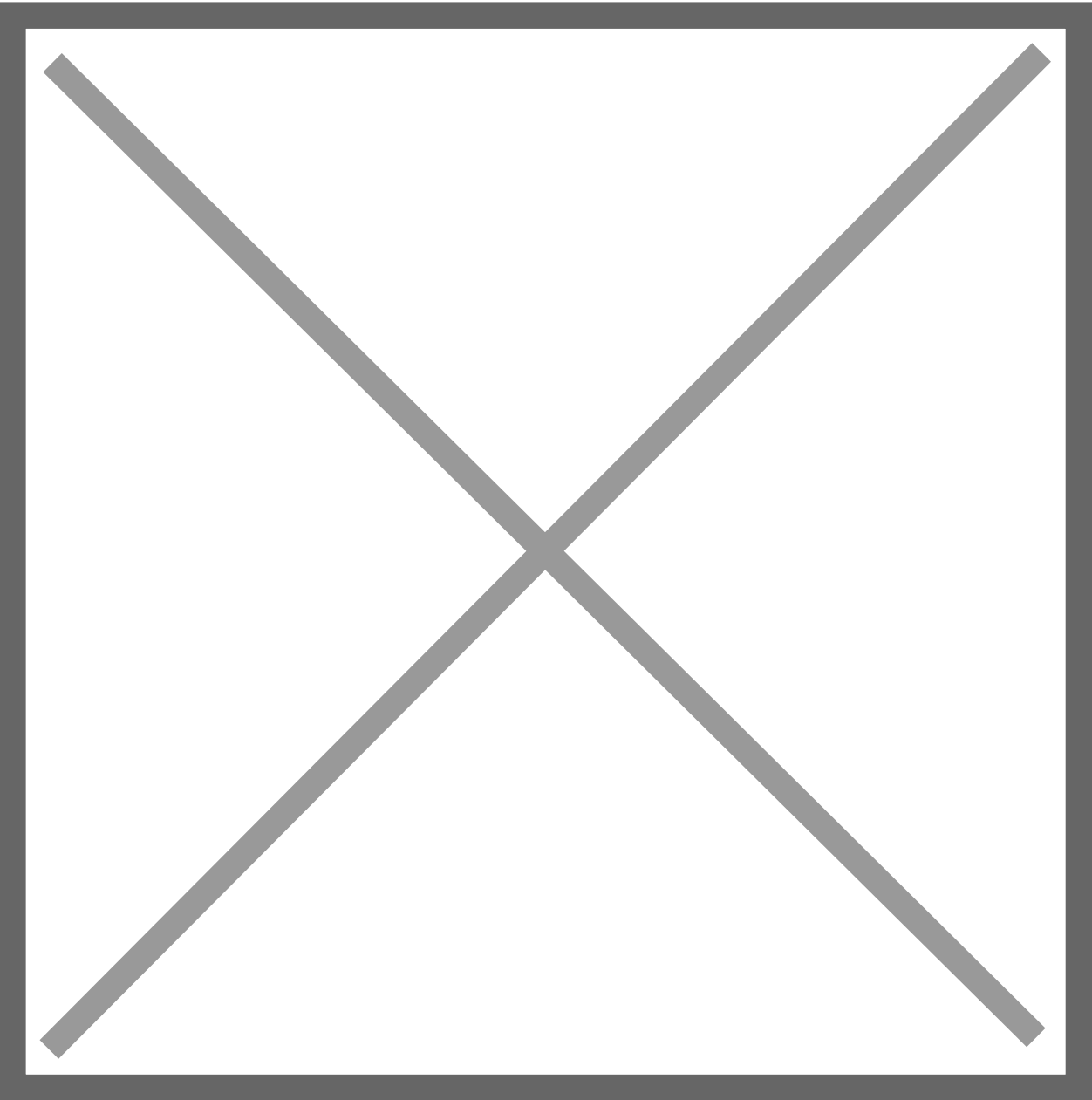
Setup reminders and view current outstanding reminders

Video training manual 2016 - [Click Here](#)



Use the refresh to view existing reminders or Plus + button to add a new reminder

Reminders are grouped into current, 7 days, less than 30 days and more than 30 days



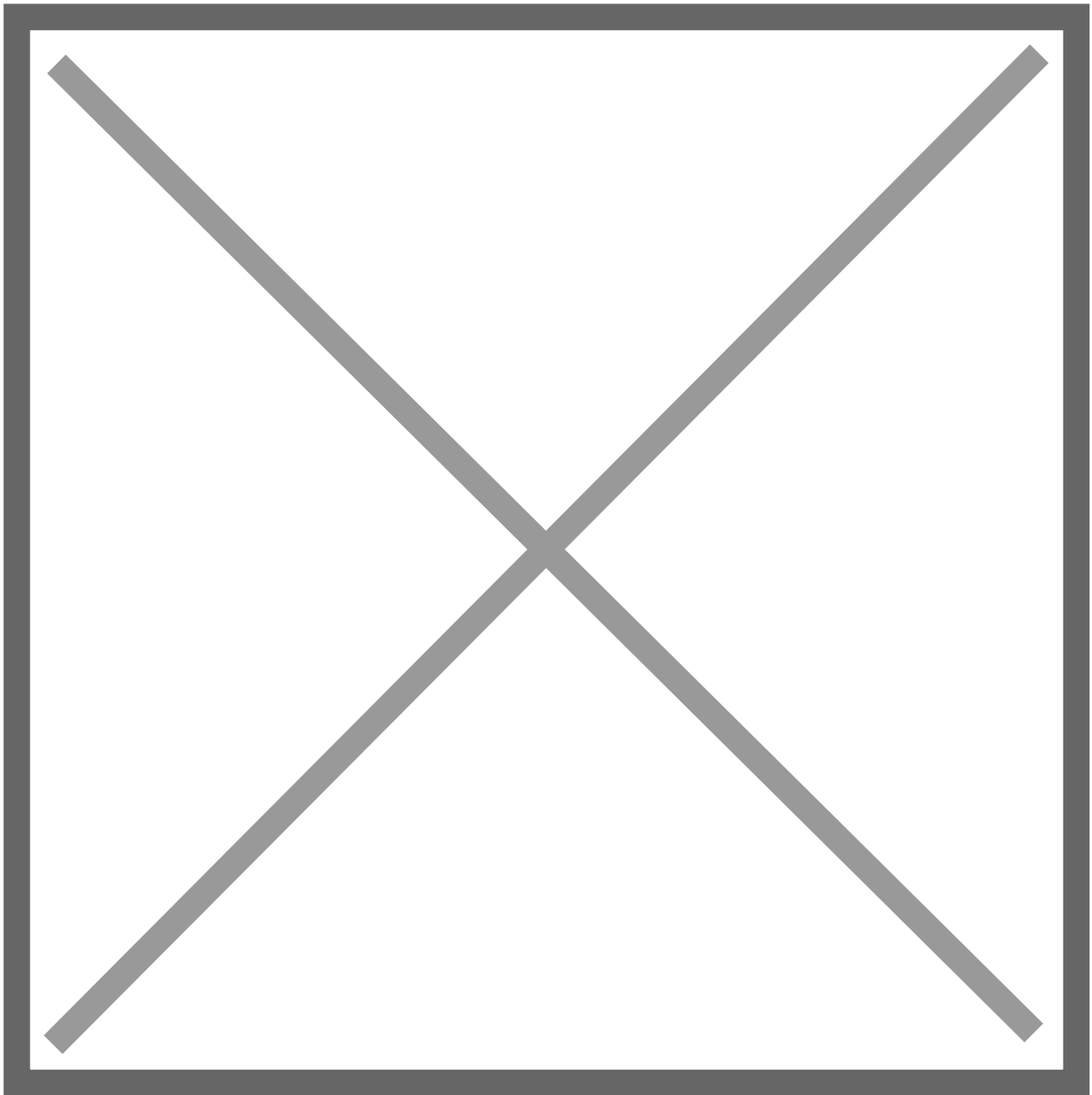
New Reminder

After clicking on the Plus + button

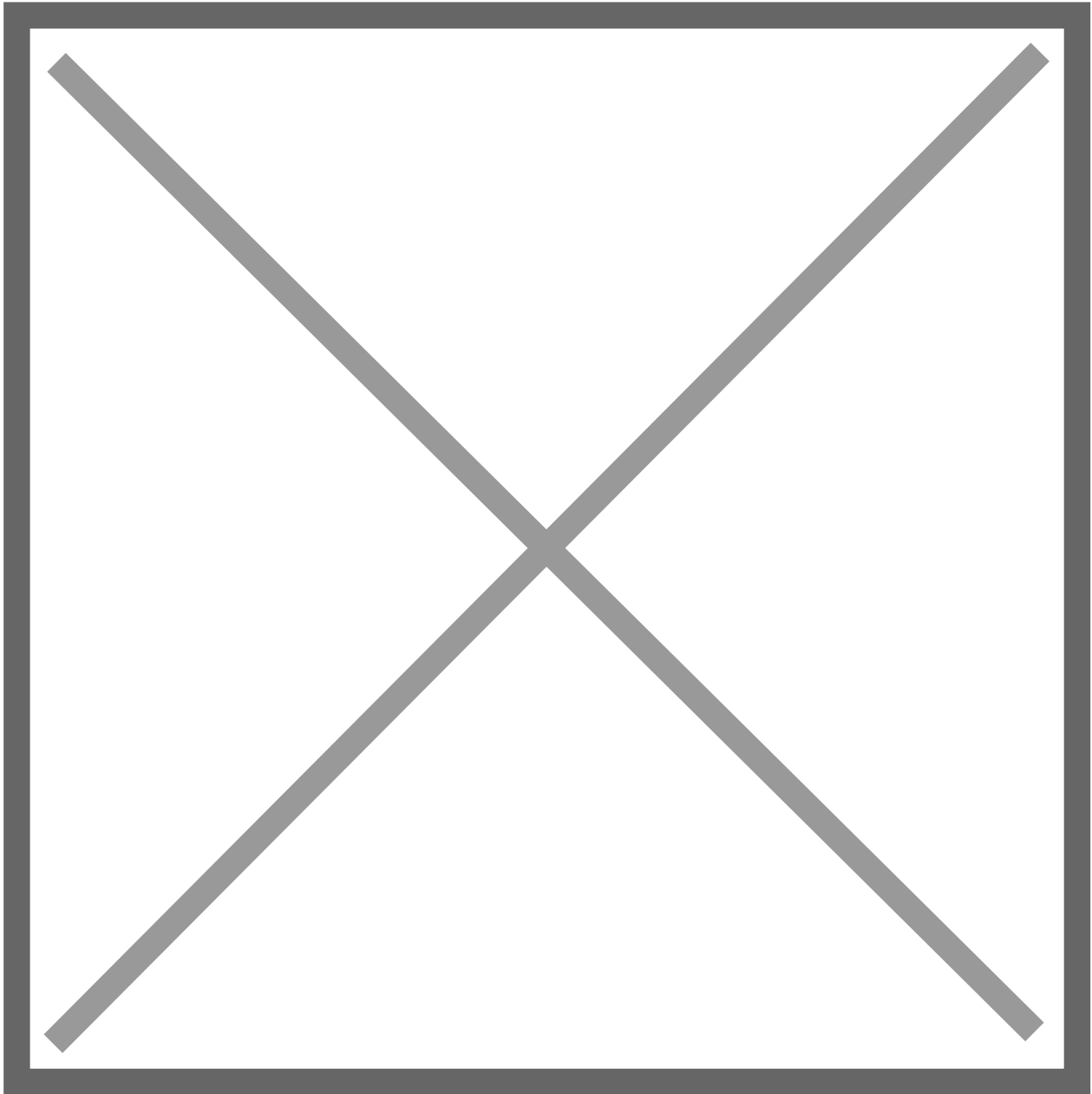
Reference	add a short note on what the reminder is about
Copy button	copy the reference to the notes section
Date	To days date will be the default
Client	select the client the reminder is linked to
Employee	this is defaulted to you, alternatively you can create a reminder for another staff member.
Notes	enter more information on the reminder
Interaction Type	send the reminder via email, sms or email and sms

Click on the tick to save the changes before going to next screen.

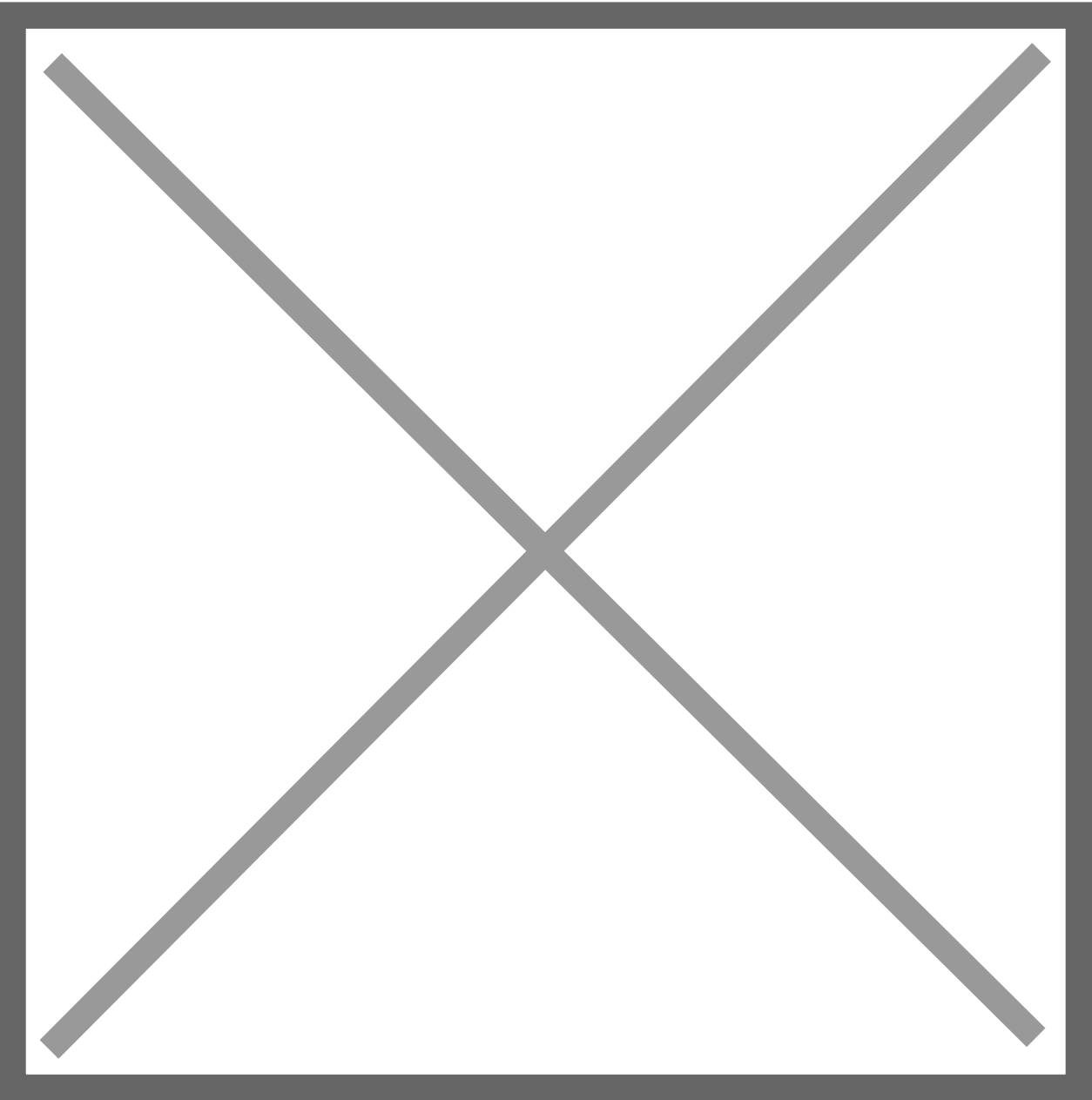
Client Visit button	create a client visit from a reminder
Complete button	Close the reminder
Email button	email the reminder to notify the other employee of the reminder



After saving, one can add an attachment



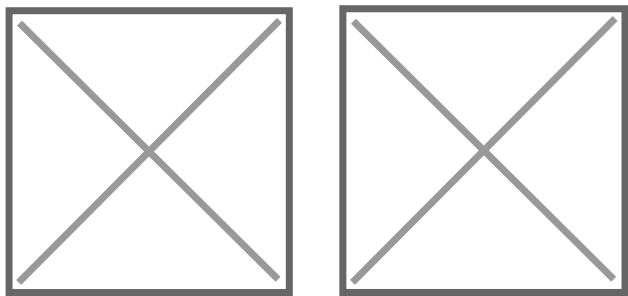
Once saved, sync to the server



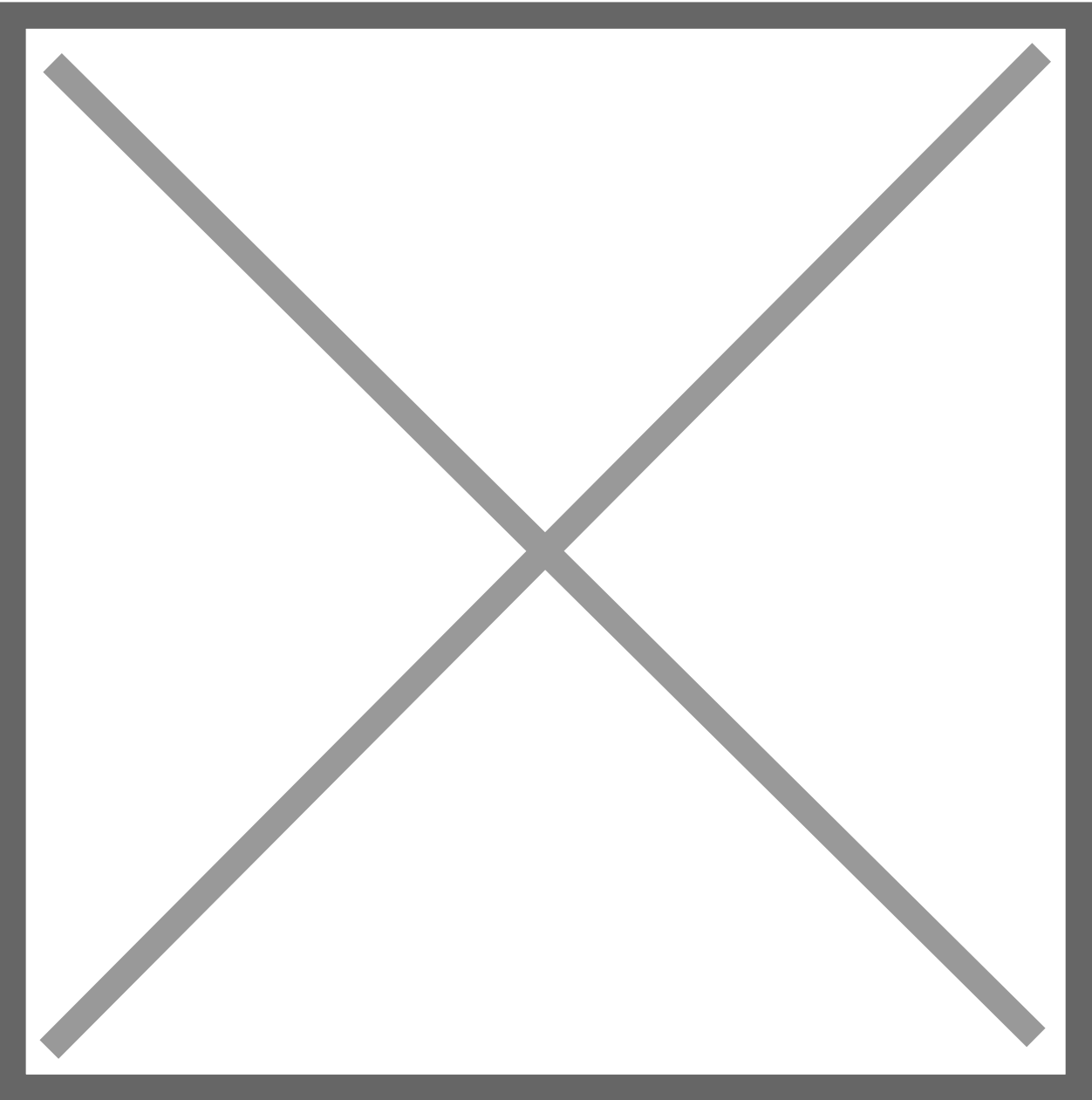
Sales Leads

Sales Leads

Track and add new sales leads in the Webatar app.



Click on the Refresh button to view sales leads



Sales Leads

New Sales Lead

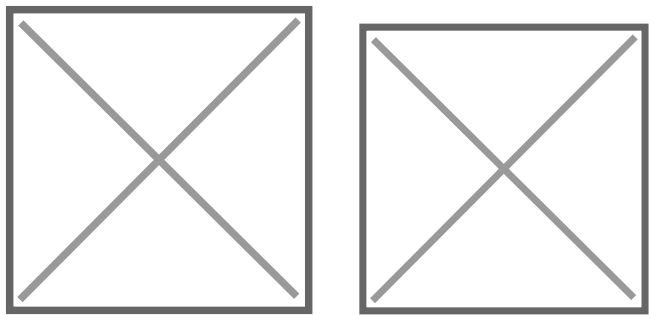
Adding a new sales lead



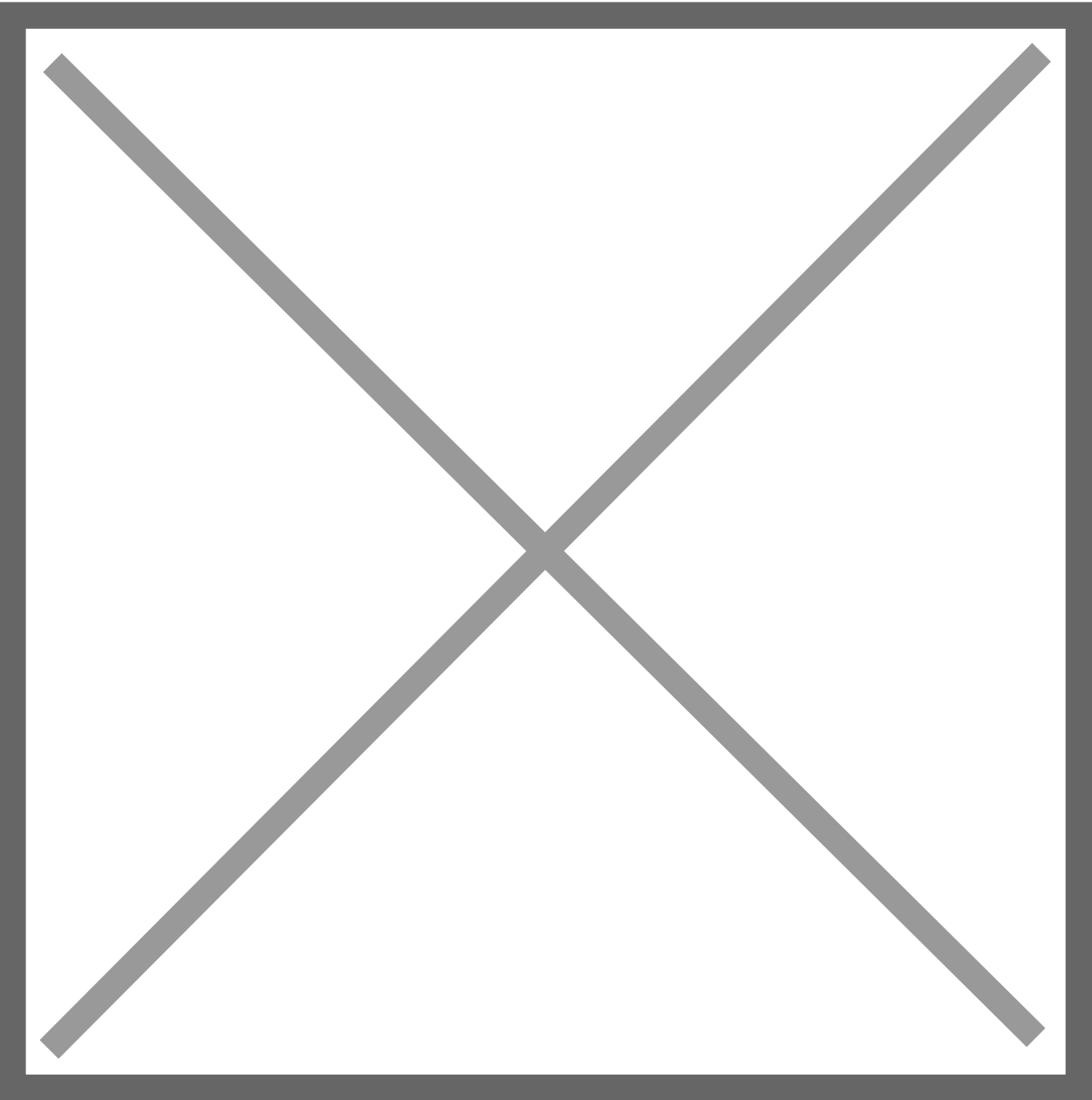
Quotes/Orders

Quotes / Orders

Create new quotes for customer



Click on the Refresh button to view quotes / orders



Quote Discount Check Online

Some discount structures require an online check.

A new button has been put on the quote list search.

After you have entered all your items.

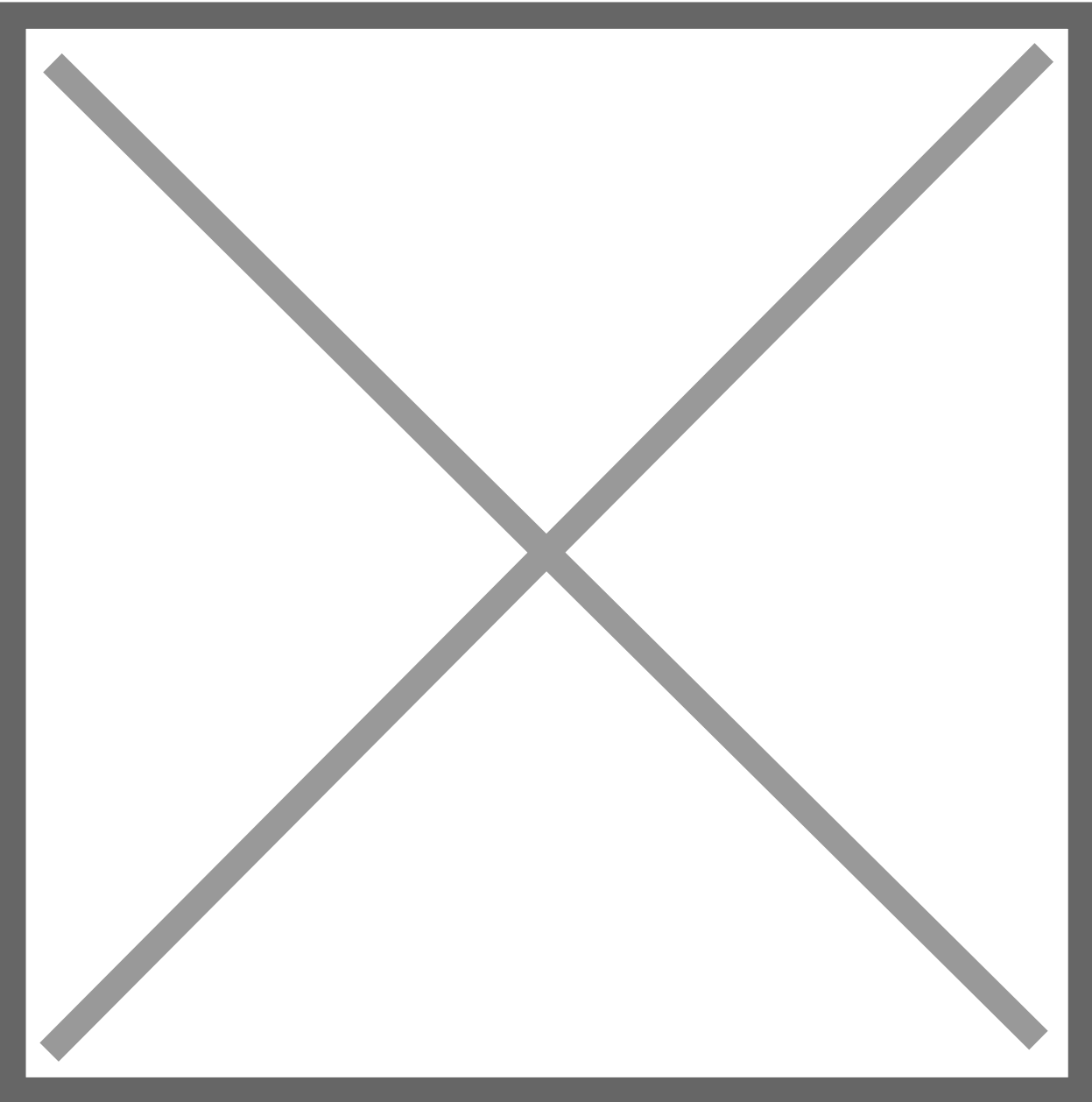
Check on the discount button to update the customer discounts.

The system will check in this order for discounts

1. Discount matrix linked to the customer and group discounts
2. Bulk discounts

Bulk discounts will override discount matrix set on line.

The discount feature will only work if the user has internet access.

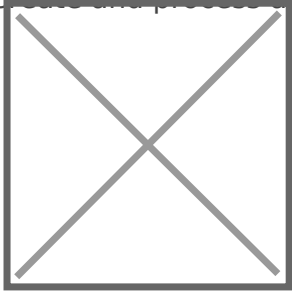


Invoice

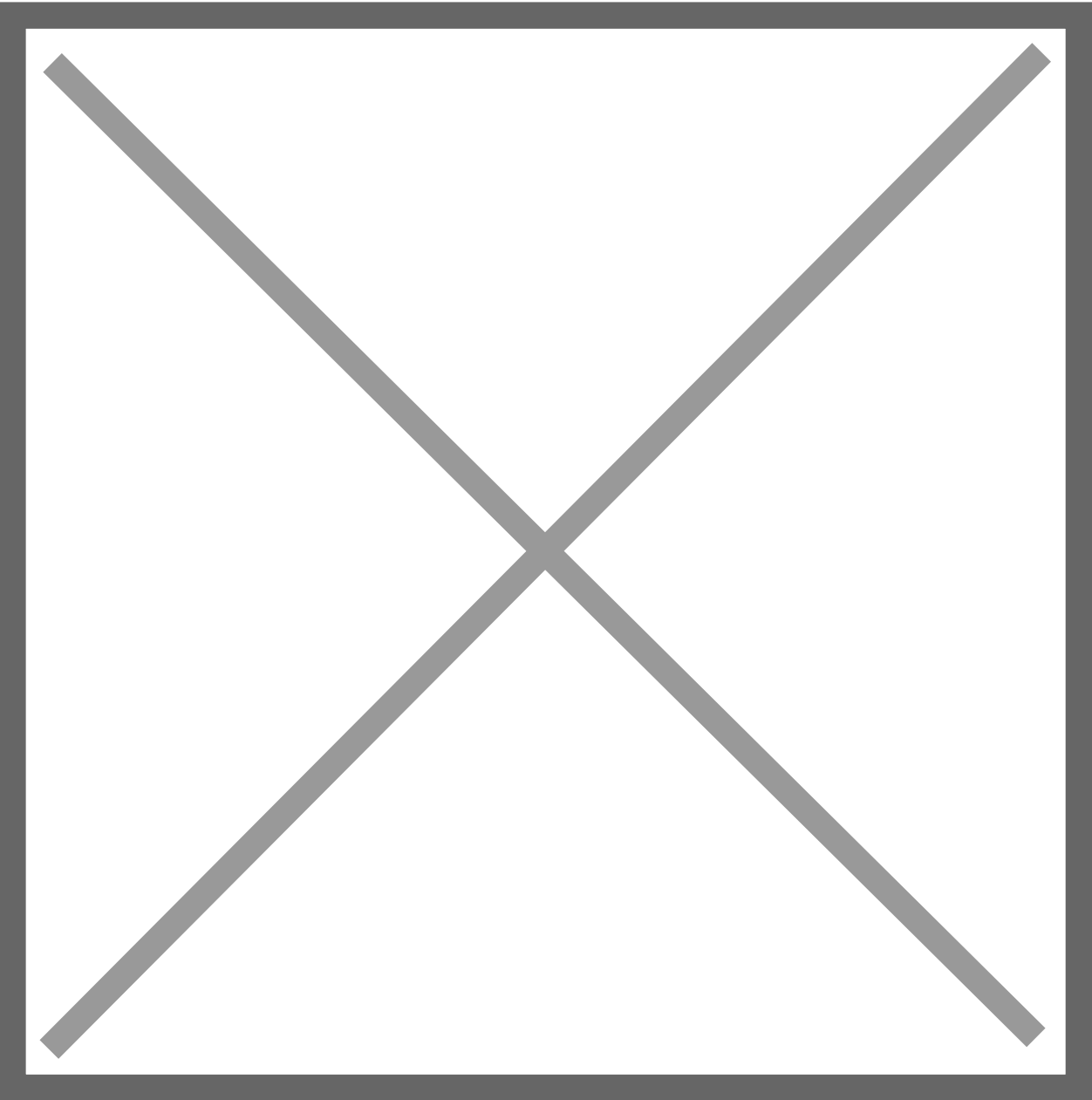
Invoice

Invoice

Create and process an invoice from the Webatar app



Click on the refresh button to search for open invoices



Invoice

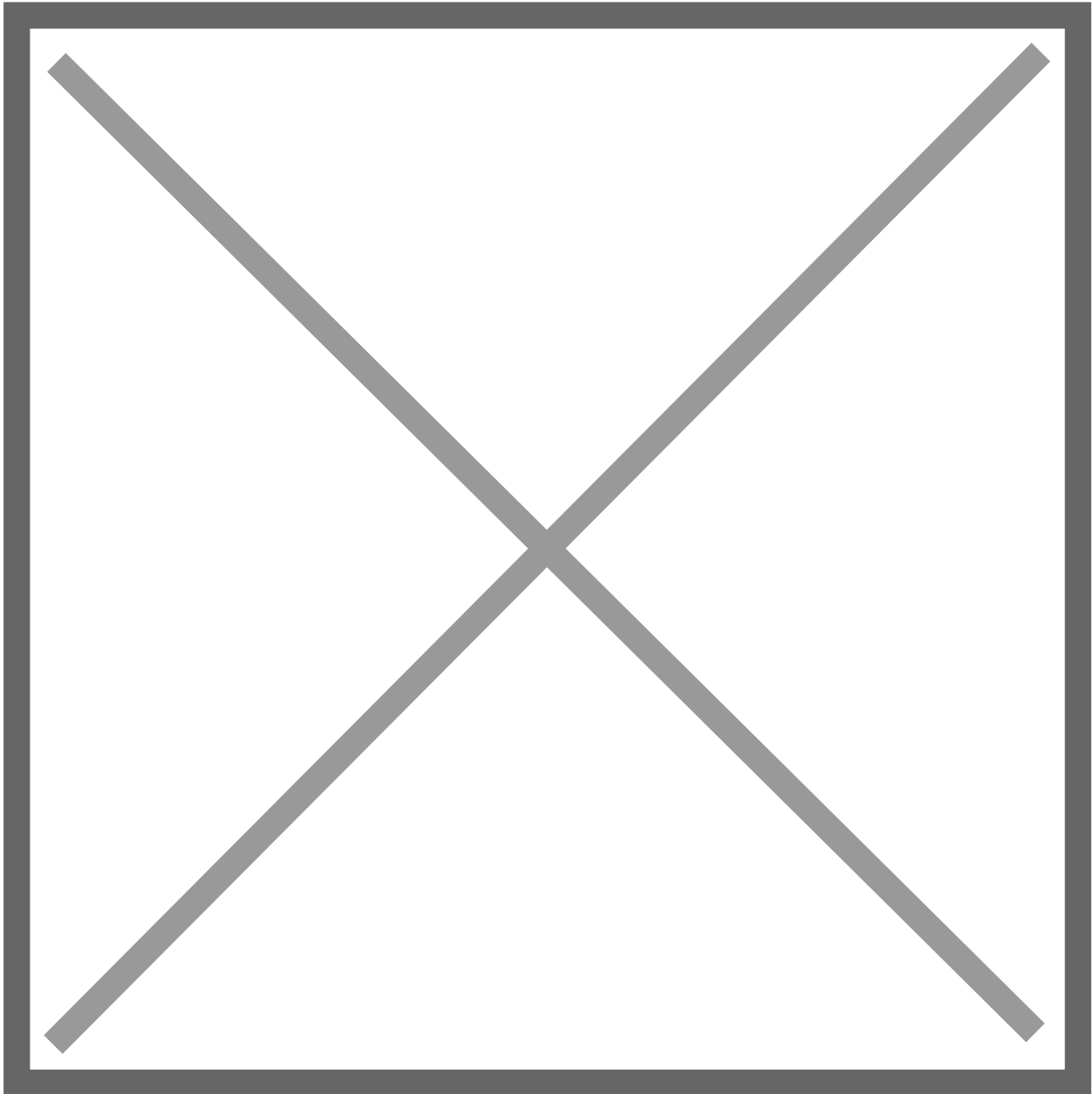
New Invoice

Create a new invoice by clicking on the Plus + button

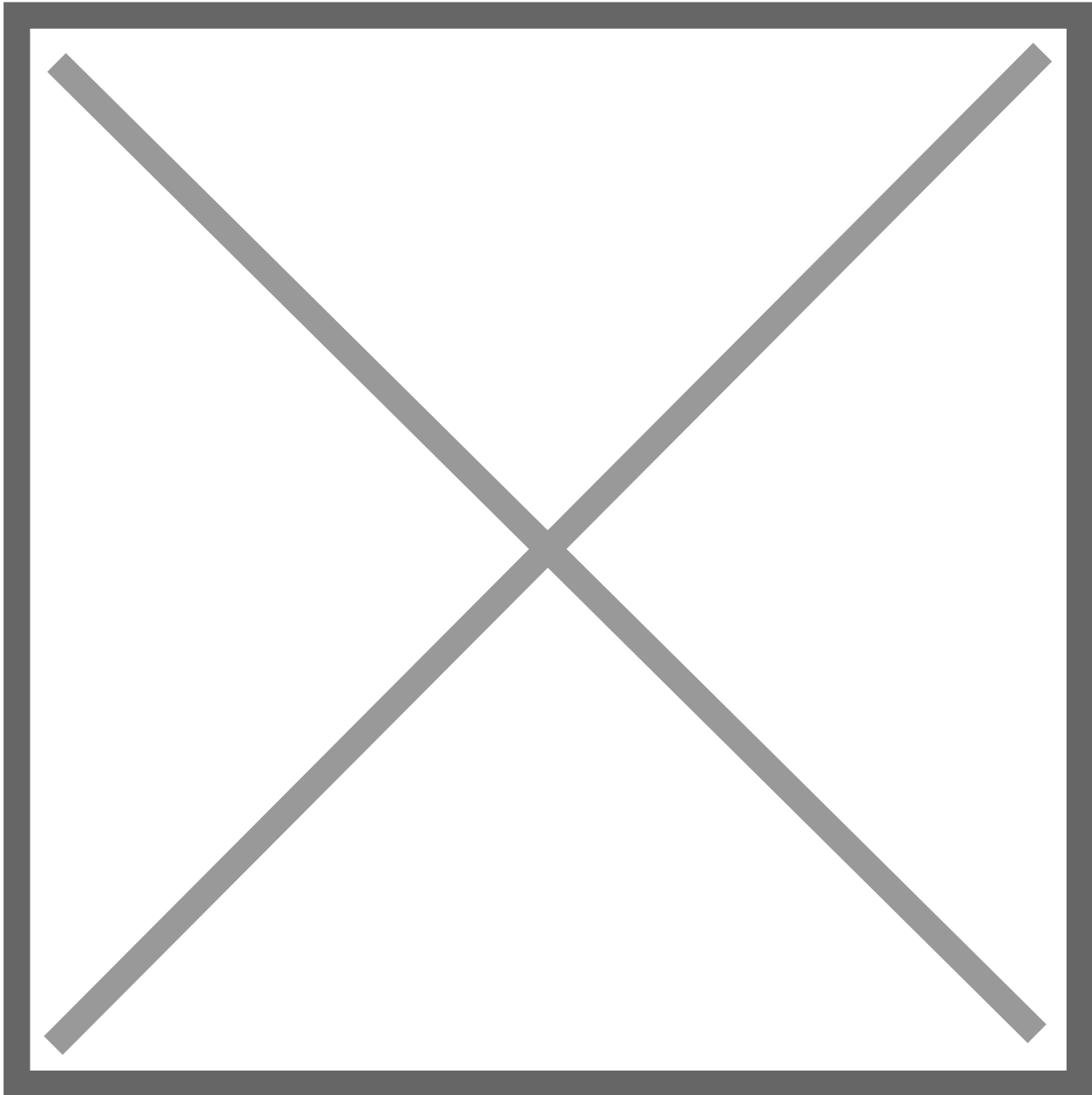
There are three main menus

1. General Details
2. Items
3. Process

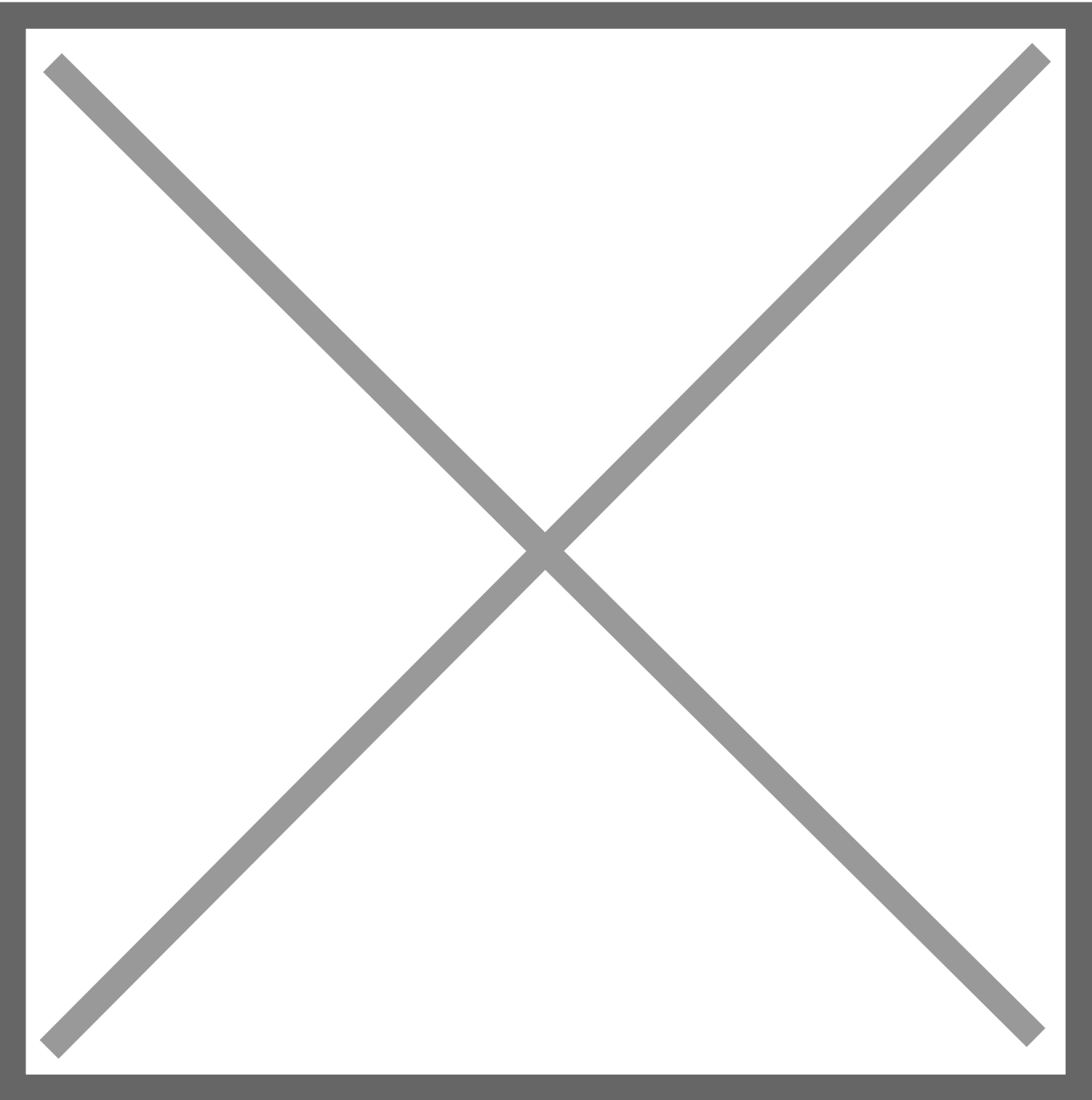
After entering the information click on the tick to save changes



Adding in a new item on the invoice



After capturing the line items, process the invoice

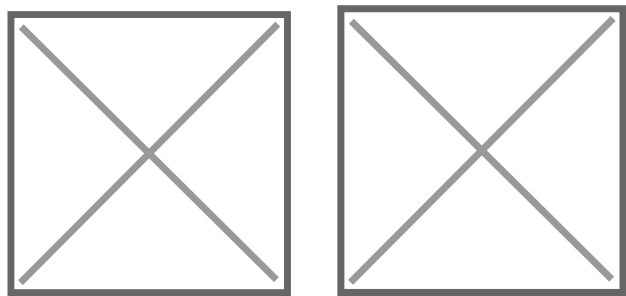


Activity Report

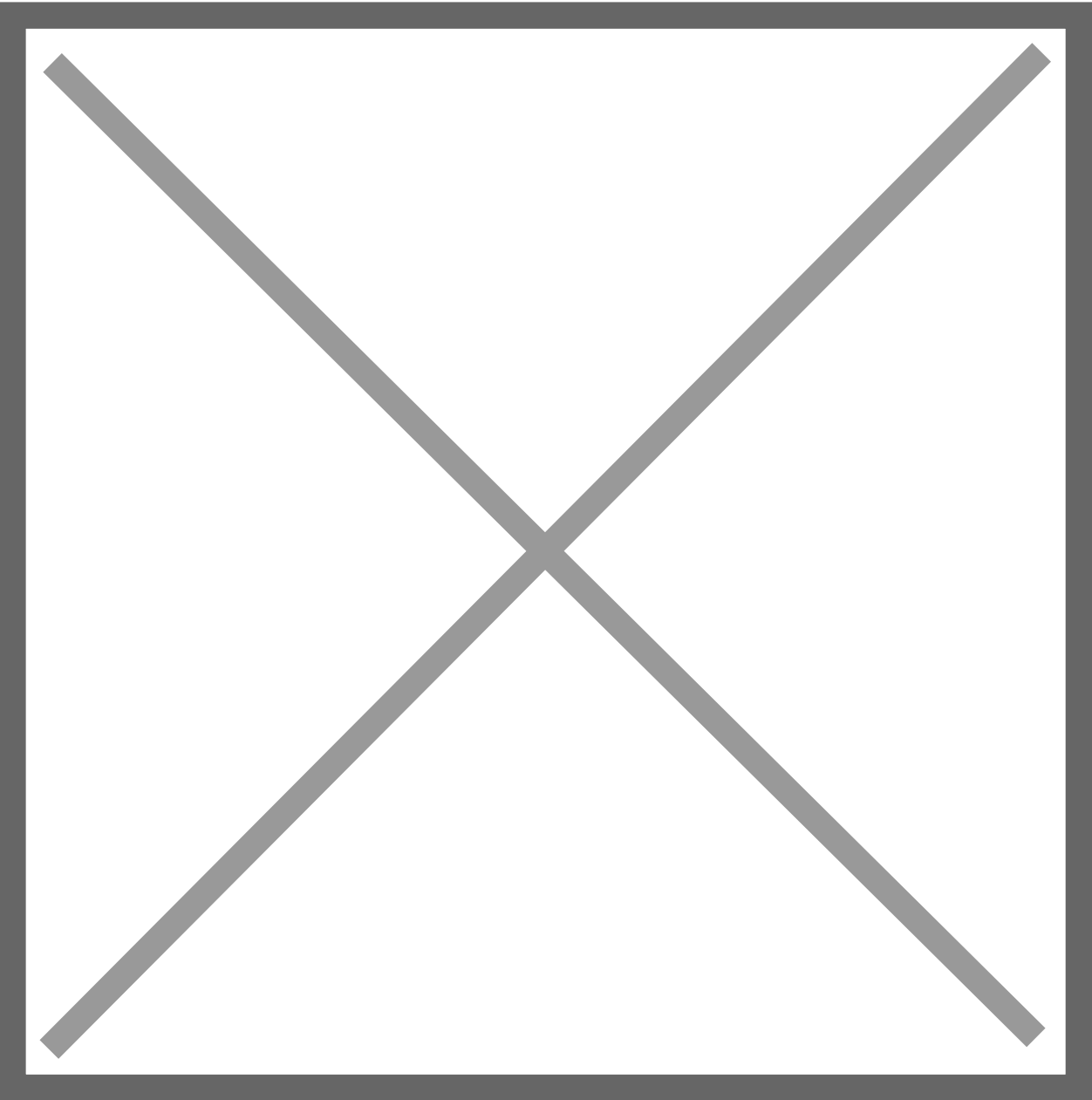
Activity Report

Activity Report

Quick view for sales reps



Run the Activity report for sales rep information

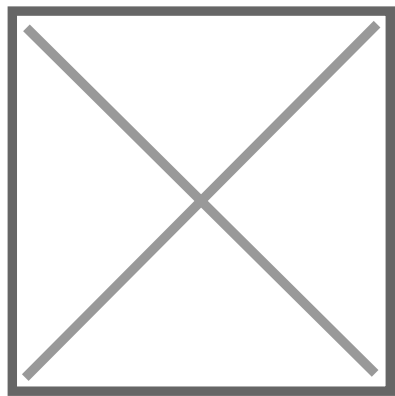


Brand Activity Report

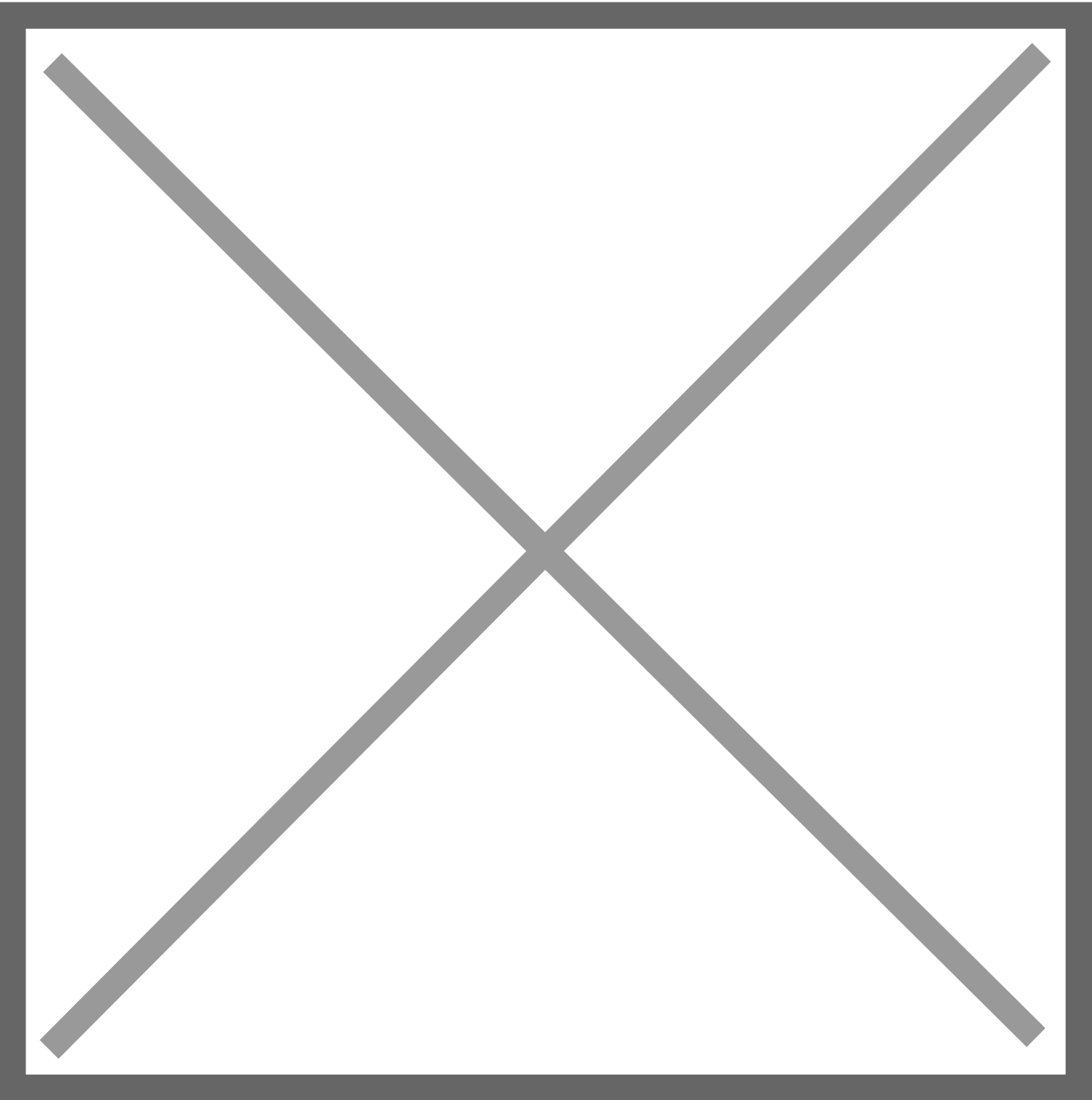
Brand Activity Report

Brand Activity Report

Quick view for sales reps



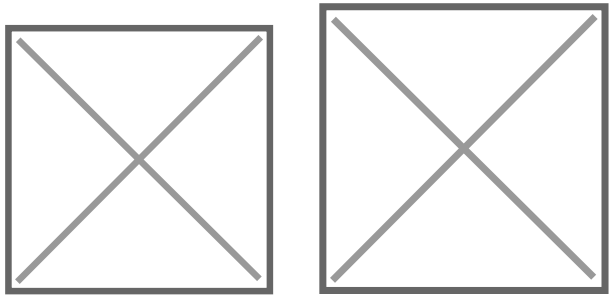
Run the Activity report for sales rep information

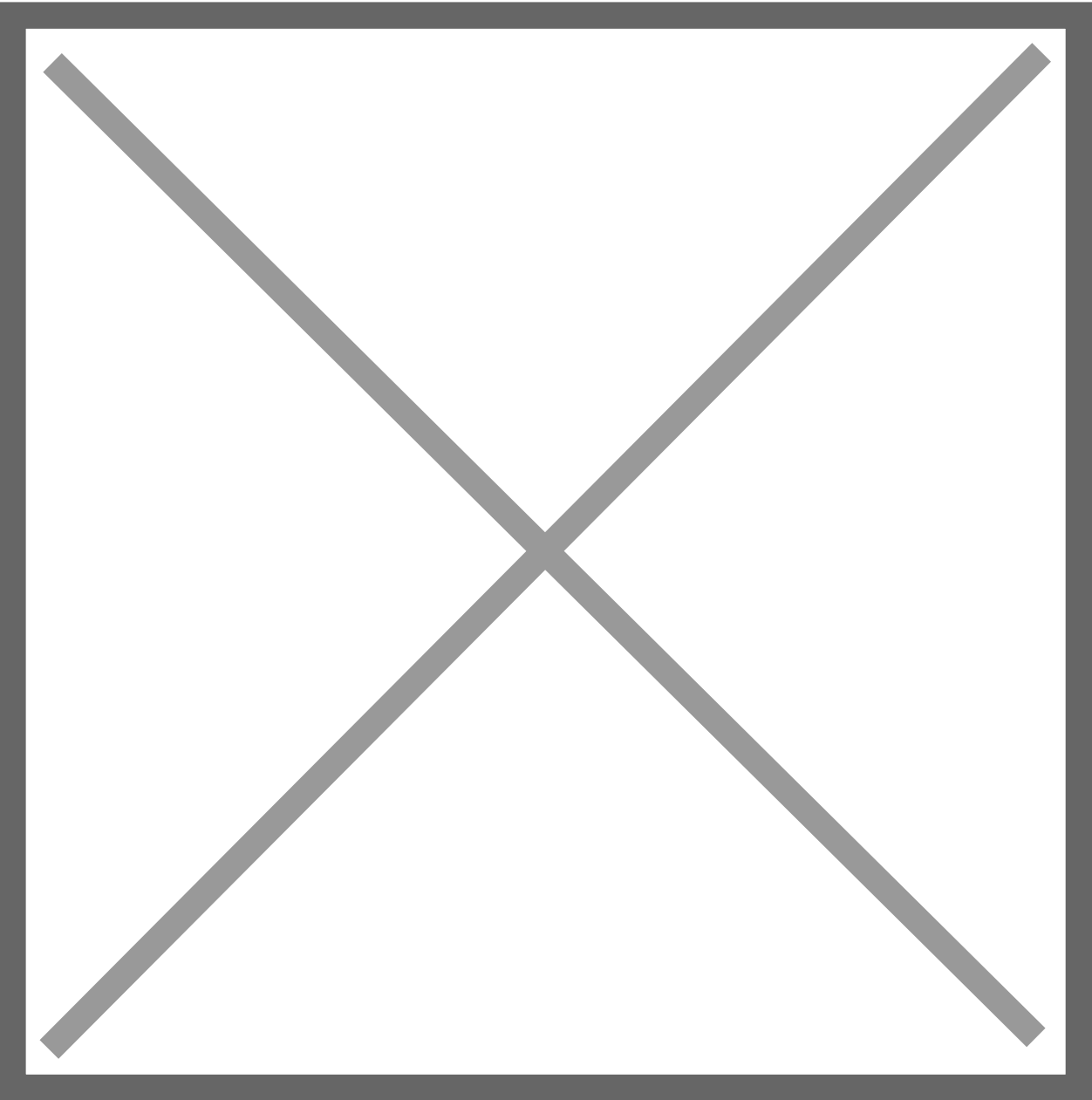


Statistics

Statistics

Search for information on sales





Quick Sales

Webatar Quick Sales app is used as a basic POS system.



Quick Sales

It allows one to capture

1. Invoice and credit note
2. Inclusive or exclusive pricing
3. Discount per line
4. Payment for Invoice
5. Receipt printing to Epson receipt printer
6. Scan barcodes

Requirements before using Quick sales

1. Items to be barcoded for quick item adding
2. General Ledger links setup for Quick sales payment processing
3. Enable security for payment and discount at user setup for Webatar
4. Receipt printer if printing receipts

Process	Process the sale and sync to main system Clears the invoice or credit note after processing
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Icons defined

	Allow for multiple of the same products to be scanned
	Scan only one of the same product Restricted to NOT allowing more than one of the same product to be scanned
	View full information of a product on the grid Includes image
	View compact grid view Allows more products to be visible on screen
	View prices including of VAT / GST
	View prices excluding of VAT / GST
	Printing of receipt disabled
	Printing of receipt enabled Will prompt for receipt printer
	Printing of receipt enabled for multiple copies
	Delete line item from document
	Change description Update discount Change price

	Compact view of line to allow to see Delete line and Change price button
	Use camera on device to take a photo and scan barcode Not required if using a barcode scanner
	Search for products by Brand, Make and Model General search by Code, Description

Invoice or Credit Note

Select between Invoice - Blue or Credit note - Pink



Quick Sales



Doc Type:

Invoice (3)

Invoice (3)

Credit Note

Customer:

WHS:

Master Warehouse

Description:

POS Sale

Receipt Printer

We have integrated with Epson tool slip printer. This means that we can now print out receipts immediately after receiving payments

The process

- Create an invoice
- Process a payment - this will update the system
- Then, take stock out
- Print a receipt on the fly

Webatar

Quick Sales

Invoice

Doc Type: Invoice (1)

Customer: ABD Company

WHS: Master Warehouse

Description: Month End Orders

Result: Successful

Multiple found

Date: 2024-01-18 08:09:15

Last Scan: 02-01/3220930

Item Code: 02-01/3220930

Description: Bend 80mm Black 90deg

Reprint

Payment

Process (1)

Logged in as: Otsile Loate

Scan stock item

Total Ex: 994.33

Total Inc: 1 143.48

02-01/3220930

Bend 80mm Black 90deg

1143.48

**Tax Invoice****Dev HSOF & Co**

4 Trig St
West Park
Pretoria
Gauteng 0183
Phone: 013-443-2794
GST: 122-321-123

.....
Invoice No: INV808706
Description: Stock count by invoice
Date: 09/01/2024
Account: ABC007
ABD COMPANY
Cust Order No: 01/09/2024

Product	Qty	Total
111100060	2	23.89
Heavy		
111100060	1	11.95
Heavy		
.....		
Total excluding tax:		35.84
GST 15%:		5.37
Total including tax:		41.21
.....		



Full priced items can be returned for a store credit within 10 days, Returns will only be accepted if all tags remain attached, Proof of purchase is required,
PLEASE KEEP THIS DOCKET AS PROOF OF PURCHASE

Quick Payments

We've introduced a payment capture feature, providing you with a seamless and efficient way to manage transactions within the application.

The system will adjust stock levels based on the processed transaction, ensuring accurate inventory management.

As part of the transaction process, Webatar will generate a detailed invoice reflecting the payment information, items sold, and any other relevant details.

For your convenience, you can export the generated invoice as a PDF document. This allows you to easily store, share, or print the transaction details.

Webatar

Quick Sales

Invoice

Doc Type:

Invoice (1)

Customer:

ABD Company

WHS:

Master Warehouse

Description:

Month End Orders

Result:

Successful

Multiple found

Date:

2024-01-18 08:09:15

Last Scan:

02-01/3220930

Item Code:

02-01/3220930

Description:

Bend 80mm Black 90deg

Reprint

Payment

Process (1)

Scan stock item

Total Ex: 994.33

Total Inc: 1 143.48

02-01/3220930

Bend 80mm Black 90deg

1143.48

Logged in as: Otsile Loate



Payments



Due **331 200.00**

Sales Amount: 331 200.00

Payment Amount:

Credit Card Charges:

Credit Payment:

Credit Card Charges:

—

No

Process (1)

Quick Sales

Quick Sales

POS Shift Open Close

When the security is active for Quick Sales to act like a till.

Then the system will check whether the till is open for Start of shift or Close of shift.

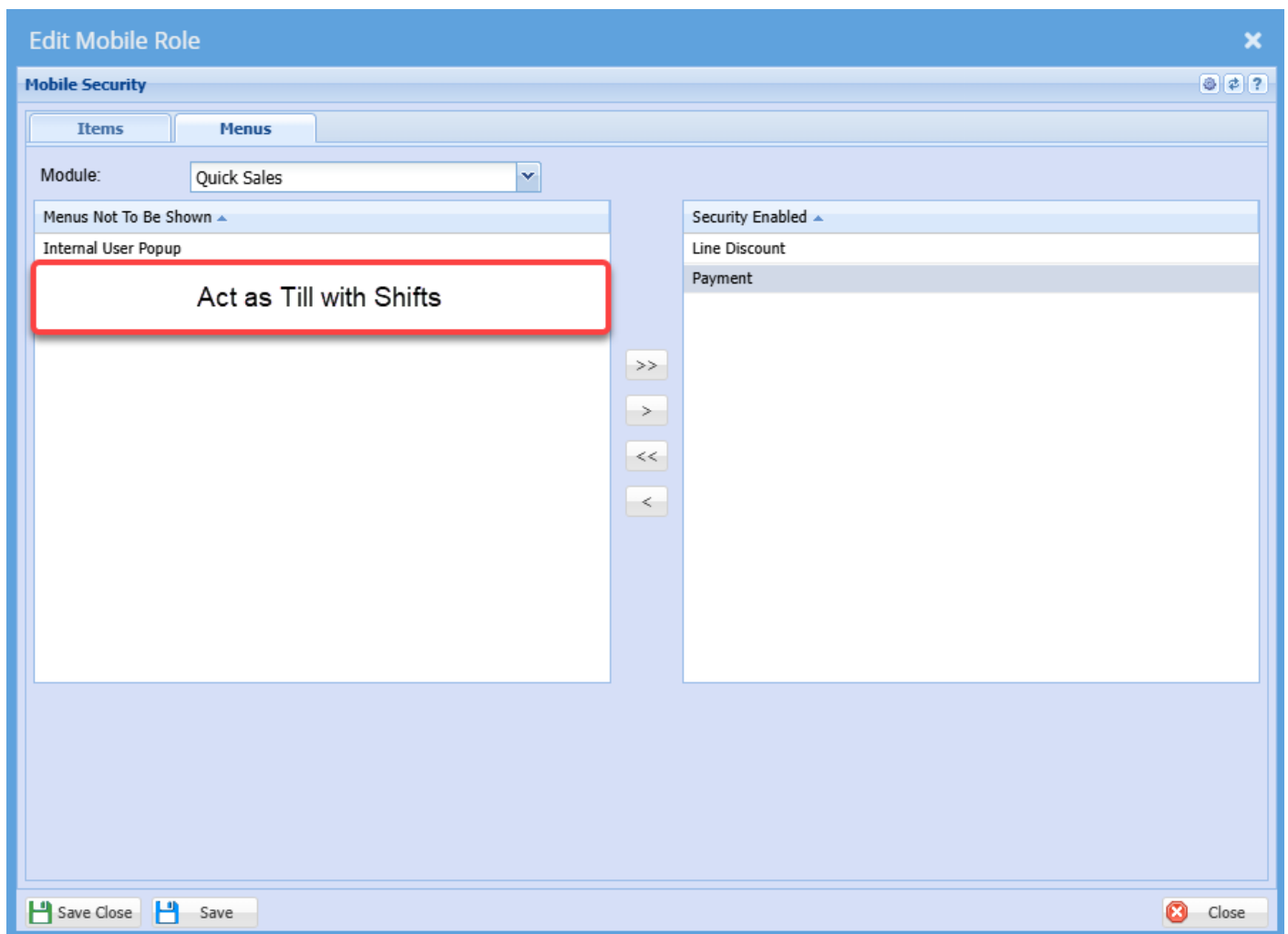
If the Till is Closed and not started for the shift, then a warning will come up to indicate that the till needs have the start of shift process activated.

The screenshot displays the 'Quick Sales' POS interface. The top navigation bar includes a back arrow, the 'Quick Sales' title, and icons for a calendar, currency, and a plus sign. The main header area shows 'Invoice - Outwards' and a 'Scan Stock Item+' button. The left sidebar contains fields for 'Doc Type' (set to 'Invoice - Outwards'), 'Customer' (set to 'New Company'), 'WHS' (set to 'Master Warehouse'), 'Description', 'Reference', and 'Prod Code'. The right sidebar shows 'Total Ex: 0.00' and 'Total Inc: 0.00'. A central warning dialog box with a red border states: 'Shift is not started for this Till. Please start the Shift for this Till' with an 'OK' button. The bottom section shows 'Result: Successful', 'Date: 2025-09-18 15:29:12', and 'Last Scan: GL9589'. The bottom navigation bar includes buttons for 'Reprint', 'Next', 'Payment', 'Process', and a '0' indicator. The footer shows the version '1.1.9 (2025-09-16)' and the user 'Logged in as: Acck Support'.

Field	Value
Doc Type	Invoice - Outwards
Customer	New Company
WHS	Master Warehouse
Description	
Reference	
Prod Code	
Total Ex	0.00
Total Inc	0.00
Result	Successful
Date	2025-09-18 15:29:12
Last Scan	GL9589

Activate Till shifts

Go to main system to ensure that Quick Sales acts like a till.



Start of Shift and Close of Shift

Webatar

Huge ERP DEMO – Sales



Quick Sales



Quotes / Orders

POS Shifts

1.1.9 (2025-09-16)

Logged in as: Acck Support