

Quick Start Guide

LumenSoft Candela Retail Management System

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Introduction

Candela RMS is a robust and powerful retail chain management system. Through its extremely customizable features, Candela RMS enables the retailer to manage the suppliers, the retail chain's business operations, and the customers. Up-to-date information of inventory, sales, receivables, and payables is available at the desktop of the decision maker(s).

In essence, Candela RMS facilitates easier barcode enabled POS functions, vendor management, customer management, inventory tracking and optimization, accounting, and business analysis.

Candela RMS can be configured in two different ways.

- ✘ First configuration is called **Standard configuration** and is designed for managing the retail operations at grocery stores, pharmacy stores, gift stores, and similar types of businesses.
- ✘ Second configuration is called **Assortment configuration** and is designed for retail management in garments and shoes industry. This configuration has extensive support for assortments and management of product sizes and colors.

Candela RMS is developed by a team of professionals having 25 man years of experience in retailing domain. Research has been conducted regarding the issues and problems of retail operations and solutions are designed which represent industry best practices. Candela RMS has evolved during last SIX years of operation at leading retail stores (including many Retail Chain Stores of Top brands). The concept behind Candela RMS is that the retailers can have immediate access to the right information. They can stay current with the changing information of any of the outlets (stores).

Candela RMS is a powerful tool for management of inventory of retail chain stores. Its intelligent inventory distribution and optimization algorithms maintain the required inventory at stores.

Stock transfers between stores is automated and centrally managed through head office. For retail chains, the data transfer from shops to the back office server (head office) is very simple and occurs with one click of a button. The data can be transferred using a phone line at the head office and the retail outlet. Also the data can be transferred using the internet. Shops can use slow speed dial up internet connection or can use DSL internet connections. Due to simplified and efficient data transfer options the management of retail chain operations becomes very easy.

Candela RMS offers retailers a feature-set designed specifically for dynamic and growing companies.

Let's Start ... Quickly!

Implementing a retail chain management solution can be a little tricky if you do not have a lead about where to start from.

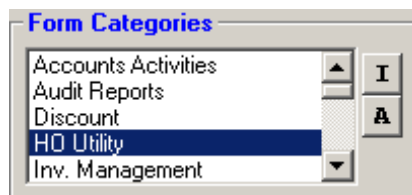
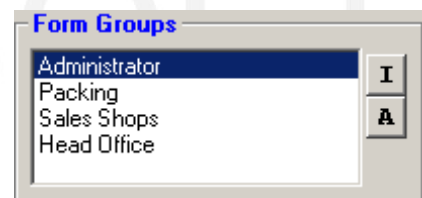
Following pages guide you through a step by step approach. This gives you only one step to focus on at a time till you are fully confident and comfortable to start using Candela RMS on your own.

Step 1 – Assign security rights to Candela RMS Users

Decide which users are going to use Candela RMS.

Candela RMS users follow a hierarchy just like the department structure of any major retail chain business. All the users are categorized into groups. Then the security rights can be assigned to each group.

Candela RMS comes with five (5) most basic user groups (i.e. Administrator, Packing, Sales Shops, and Head Office). You can add more groups to this list as per your business requirements.



Candela RMS offers you an extremely customizable **security module**. By using this module you can assign rights of a particular operation or group of operations on a particular screen to a certain user or group of users.

Right on Forms		A	I	A	I	A	I	A	I	A	I
Group Name	Form Name	View	Save	Update	Delete	Print	Export				
Administrator	Bin Card Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	Product Audit Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
	Shop Auditing Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
	Shop Wastage Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				

Always assign a secure password to each user. You can also erase security of a particular user by providing blank password.

Menu Locations

Menu Location	Screen Description
Security→Groups	Add/Modify/Delete security group
Security→Group Shops	Assign shop(s) to a particular group
Security→Users	Add/Modify/Delete user
Security→Form Management	Assign security rights to screen(s) and button(s)
Security→Register New Client	Register an additional machine for Candela RMS (for Professional and Enterprise versions only)

You can deactivate a particular user by providing an End Date for him.



Step 2 – System Configuration

Before you start any business you have to decide a certain set of rules and policies.

These policies and settings can be about your company name, product code scheme, product barcode template selection, invoice settings, price settings, loyalty club, and external devices.

Menu Location

Configuration→System Configuration

Step 3 – Define Products

Now you can define your business items or products or stock key unit (SKU).

Menu Location

Configuration→Products

Step 4 – Define Suppliers

Suppliers or vendors are entities from which you get your stock. So before entering any stock or defining any products in your system you need to define suppliers from which you make purchases.

Menu Location

Configuration→Misc→Suppliers

Step 5 – Supplier Account Closing

In Candela RMS you can make credit transactions only with those suppliers that have an opening balance, so that their ledger can be maintained. So if you want to make purchases from a certain supplier, that supplier must have an opening balance. You can enter it on account closing screen.

Menu Location

Supplier Activities→Account Closing



Step 6 – Purchase

Make purchase in two ways, via purchase order (PO) or direct purchase based on the items required. Then using the Candela RMS purchase module you can make payments for the purchases that you make.

Menu Locations

Supplier Activities→Purchase Order

Supplier Activities→Purchase

Supplier Activities→Payments

Step 7 – Stock Take

To keep track of your items accurately you must perform stock take. In Candela RMS you can do so by using physical audit screen. If you have already entered the purchase for your every product item, you do not need to perform the physical audit.

Menu Location

Shop Activities→Physical Audit

Step 8 – Define Customers

If you want to perform sales on credit you need to a member club. Candela RMS provides you the liberty to create and maintain such a club.

Menu Locations

Shop Activities→Membership

Shop Activities→Customer Receipt

Shop Activities→Customer Payment

Shop Activities→Customer Account Closing



Step 9 – Sales & Returns

You can perform sales and returns.

Menu Location

Shop Activities → Sales and Returns

Note: Although you can jump to **Step 9 - Sales & Returns** right after **Step 3 – Define Products**, but **it is highly advised to follow all the steps in the mentioned hierarchy** in order to follow the standard procedures of a typical retail chain management system.

Step 10 – Reporting

You can generate reports.

Menu Location

Reports



By default system contains sample transactions for the month of February 2008. To get meaningful data while generating reports please provide Start Date as 1st Feb 2008 and End Date as 28th Feb 2008.

