

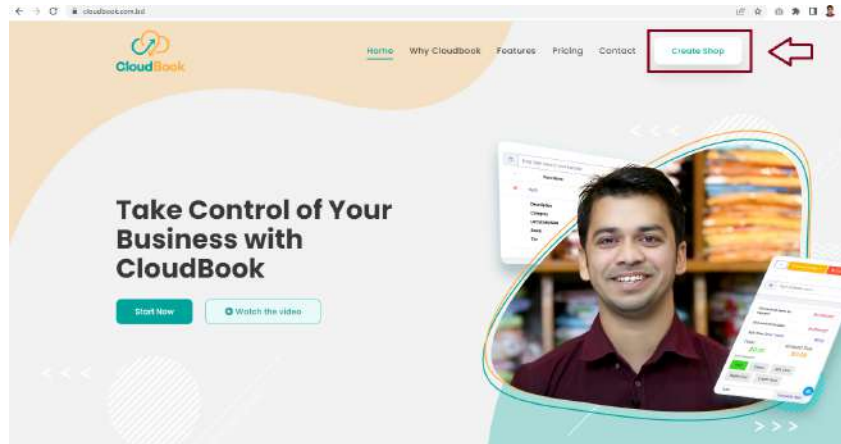
# User Guideline for CloudBook

## Table of Contents

How to create a Shop in CloudBook	2
How to Manage Suppliers in CloudBook	5
How to Manage Products in CloudBook	7
How to Re-stock / Receive Products in CloudBook	13
How to Manage Sales Effectively in CloudBook	16
How to manage Customers in CloudBook	19
How to manage Gift Cards In CloudBook	23
How to manage Employee In CloudBook	25
How to manage Expenses in CloudBook	28

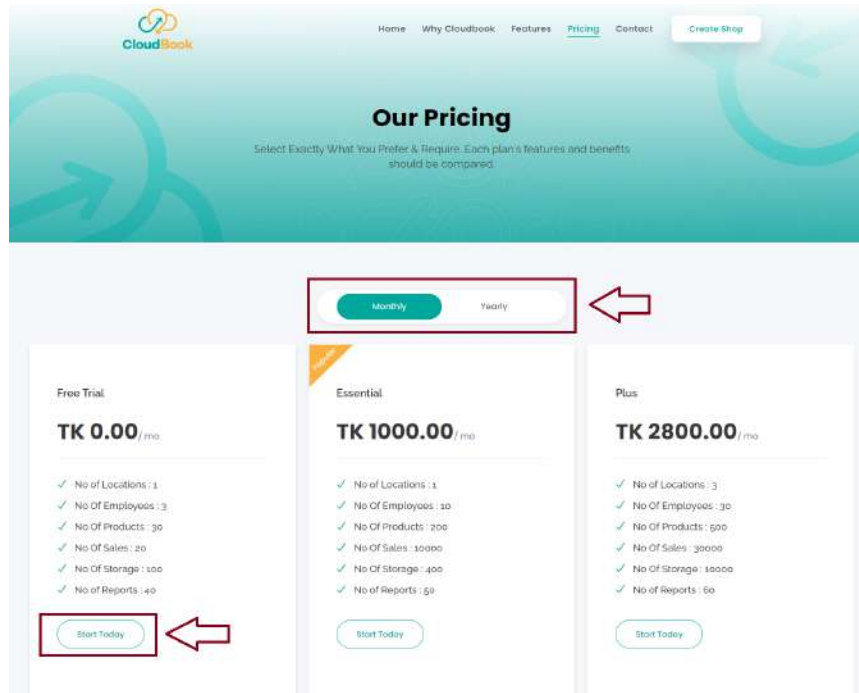
# How to create a Shop in CloudBook?

1. At first go to [www.cloudbook.com.bd](http://www.cloudbook.com.bd)

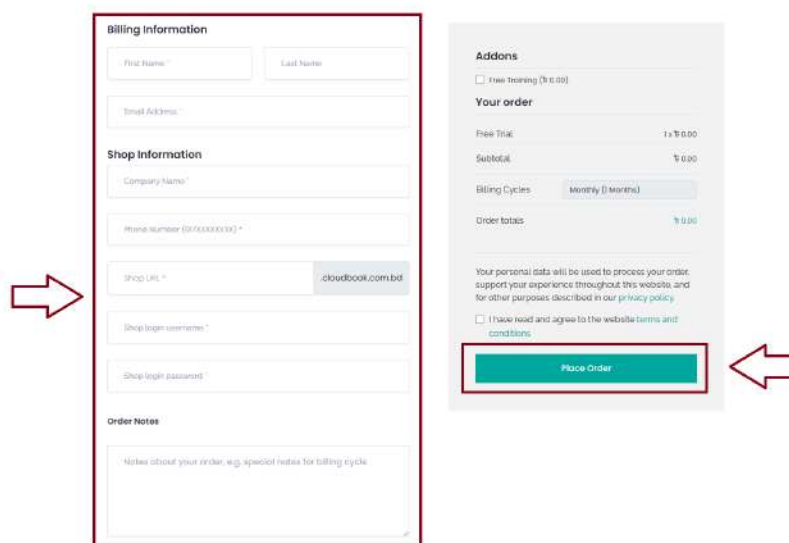


2. Click on the **Create Shop** button

3. Select the pricing plan and click on the **Start Today** button



4. Fill up all the necessary information and click on the **Place Order** button



5. After signup, you will see your shop details and you will get a confirmation email, click on the provided **link** or go to the **Login** section to reach your **Shop Dashboard**

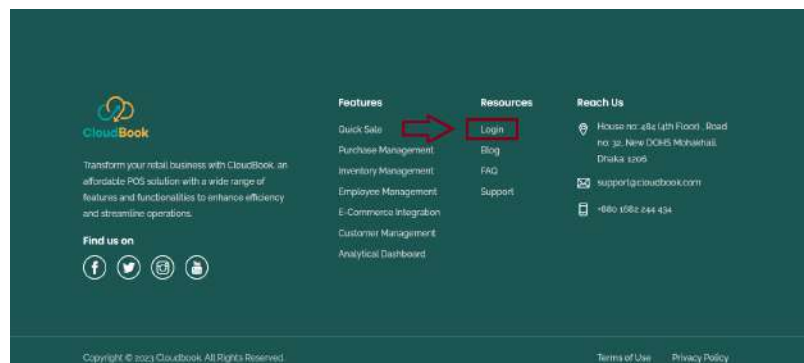


**Thank you for your Subscription!**

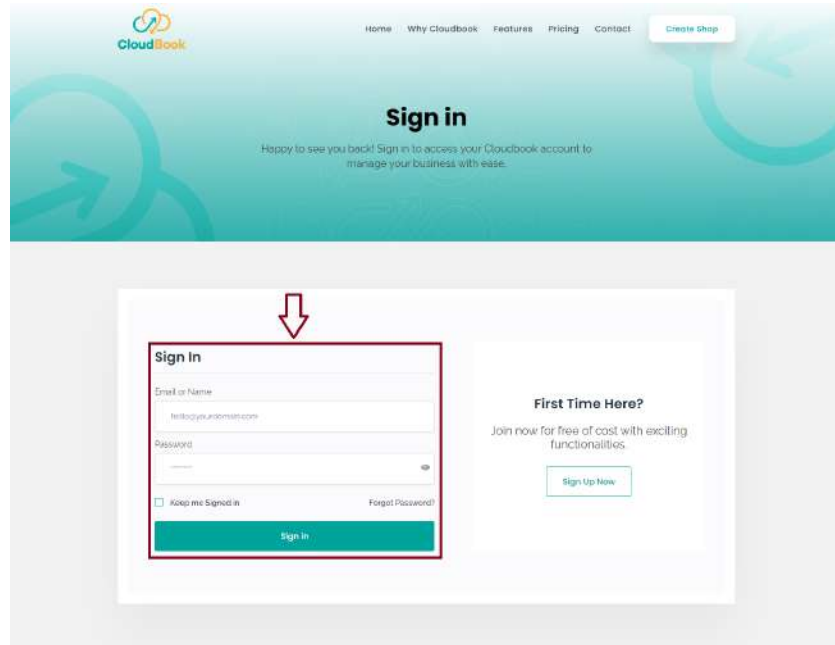
We've sent the invoice in your inbox. Let's get started the awesome things.

Total Amount:	Free
Order Date:	06 Jun 2023
Shop URL:	<a href="http://autorun.cloudbook.com.bd">http://autorun.cloudbook.com.bd</a>
Username:	Mobasports
Password:	Q3456

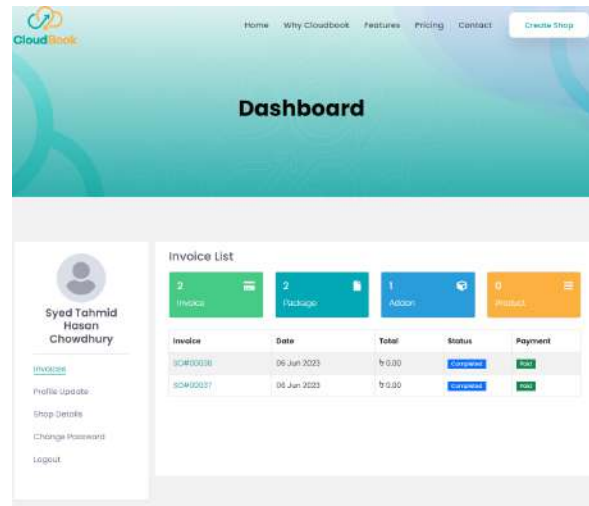
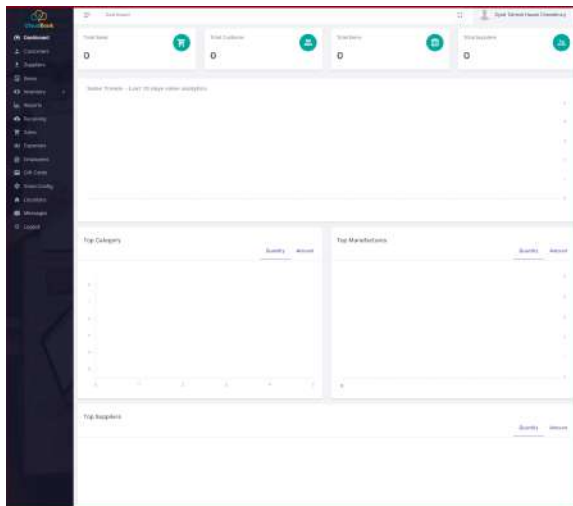
[Back to home](#)



6. Put your email id and password in and press the **Sign In** button

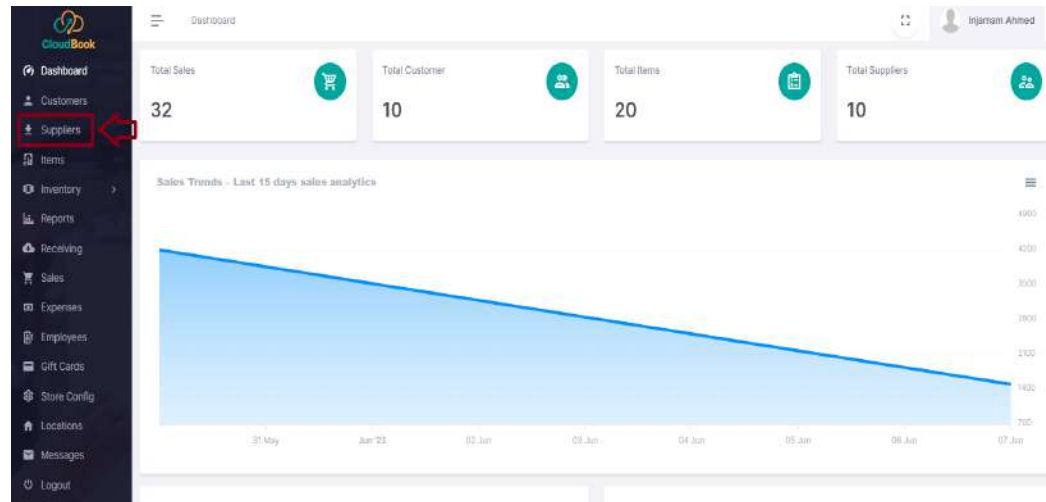


7. Now you are done with your shop creation and you will see your **Shop Dashboard**. You can now add your product/customer and do lots of things easily.

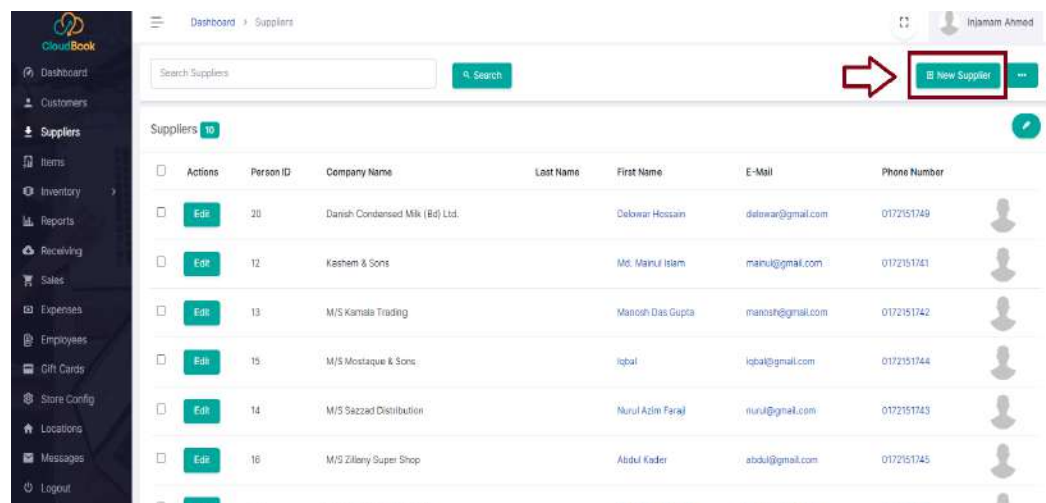


# How to Manage Suppliers in CloudBook

1. Log in to the CloudBook and click on the **Suppliers** feature

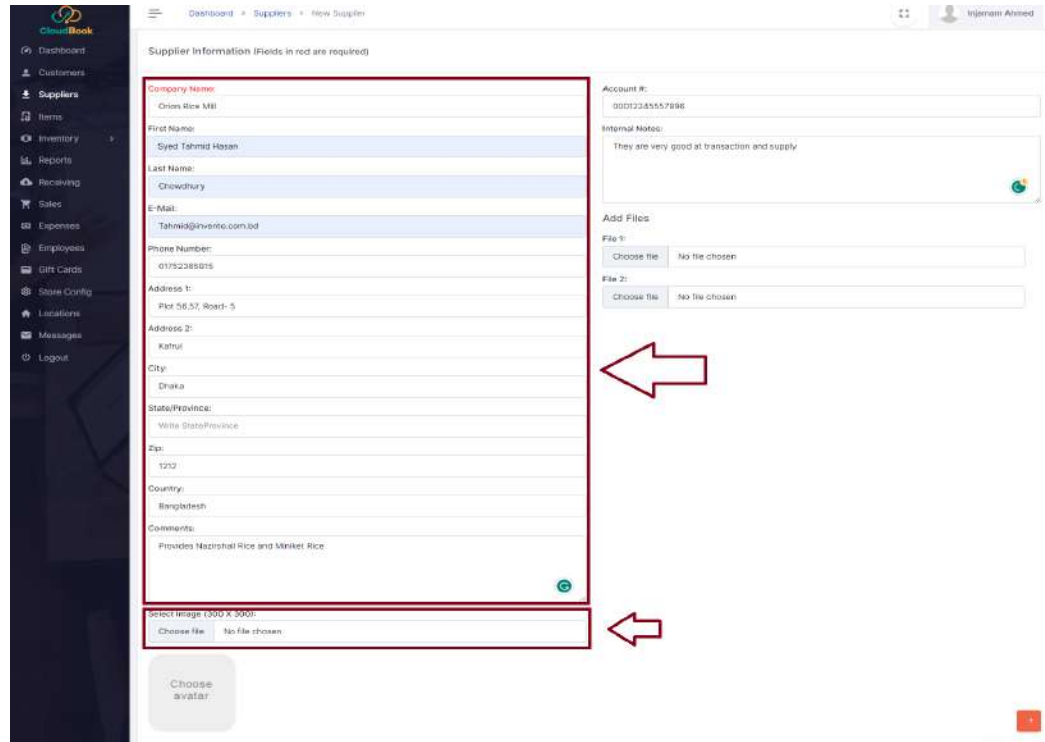


2. Click on the **New Supplier** button



3. Fill up the necessary fields and you can insert a photo in the **Select Image** section.

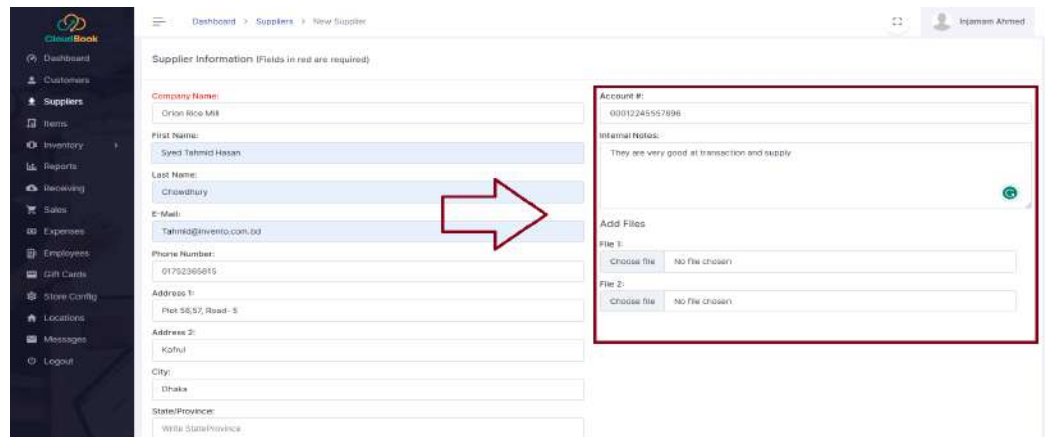
**Example:** You can add suppliers' company/product image.



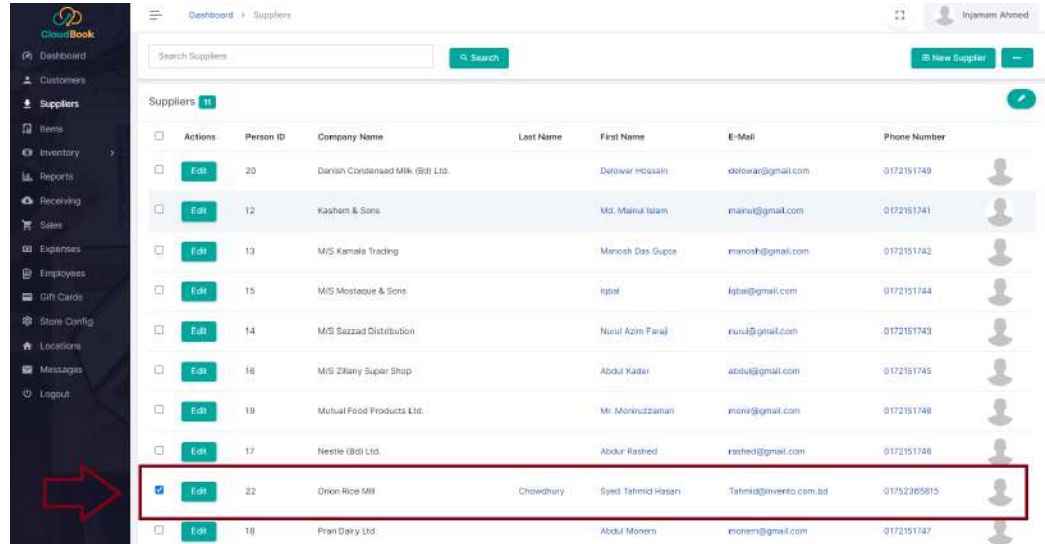
4. Now provide the supplier's bank account number and fill up the other fields. Also if you want you can attach images in the **Add Files** section.

**Example:** You can attach business agreement files.

Now click on the **Save** button, your new supplier has been created.

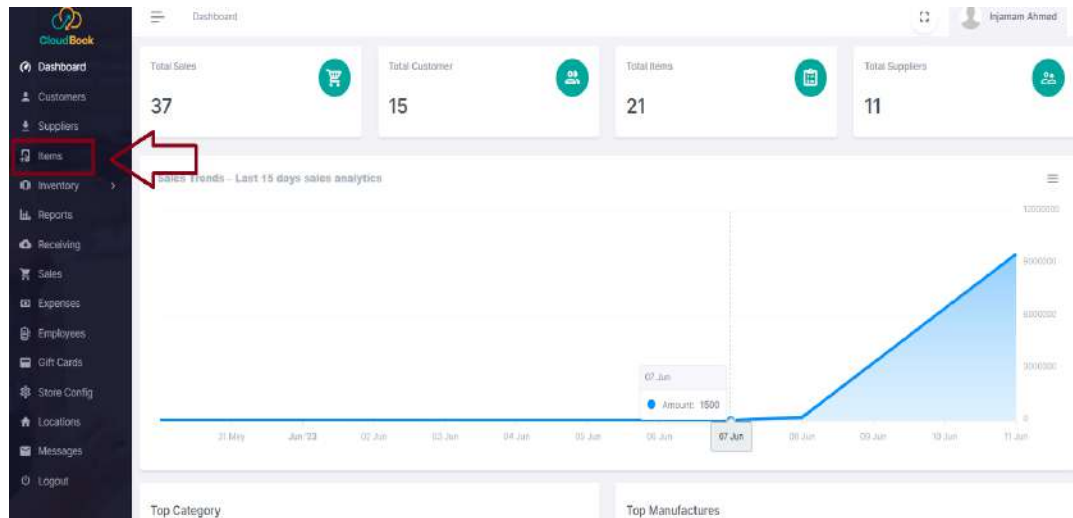


5. Now you can see your newly created supplier on the **Supplier** list.

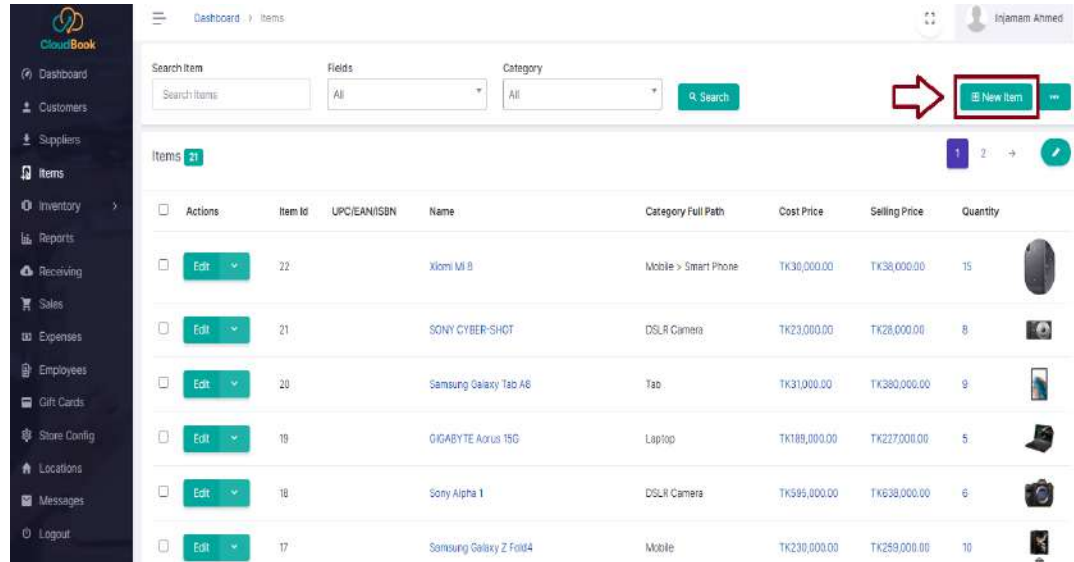


## How to Manage Products in CloudBook

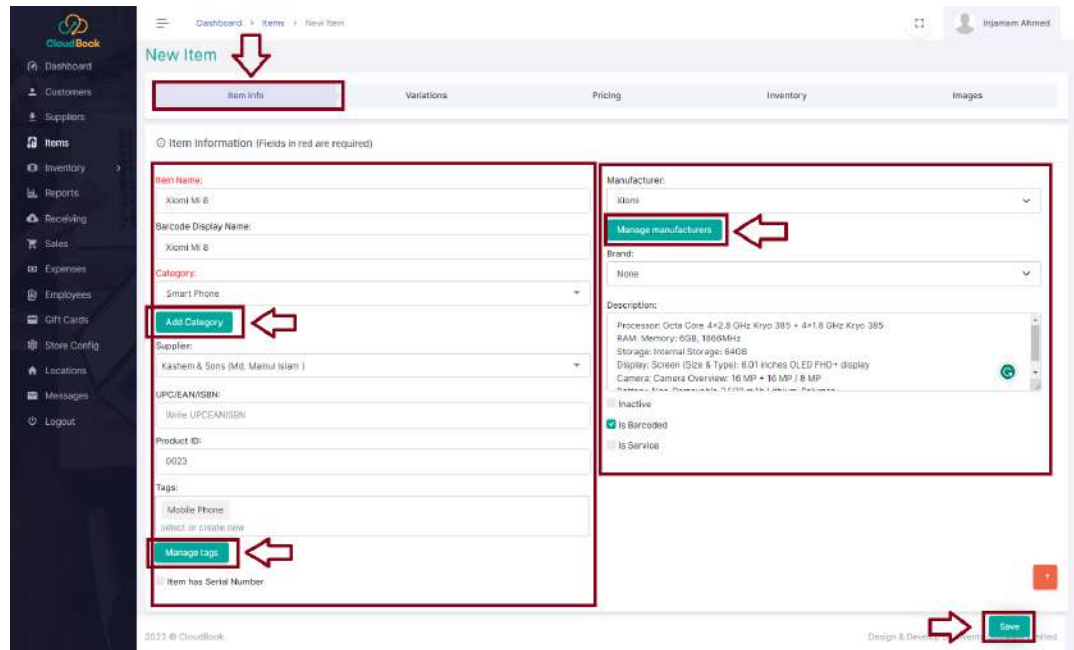
1. Log into the CloudBook and click on the **Items** feature.



## 2. Click on the **New Item** button



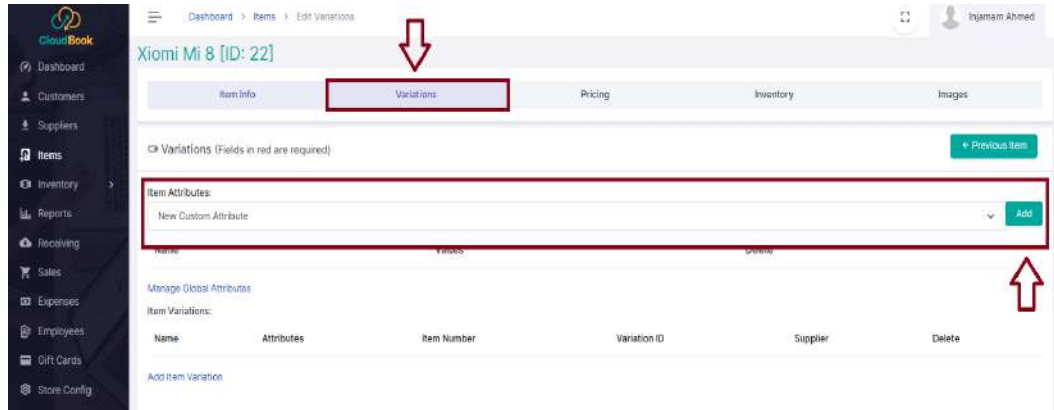
## 3. Fill up all the necessary fields, and if you want to add new **Categories /Tags /Manufacturers** then you can easily create them by clicking on the highlighted buttons and writing the new name. After filling in all the information about the product, click on the **Save** button.



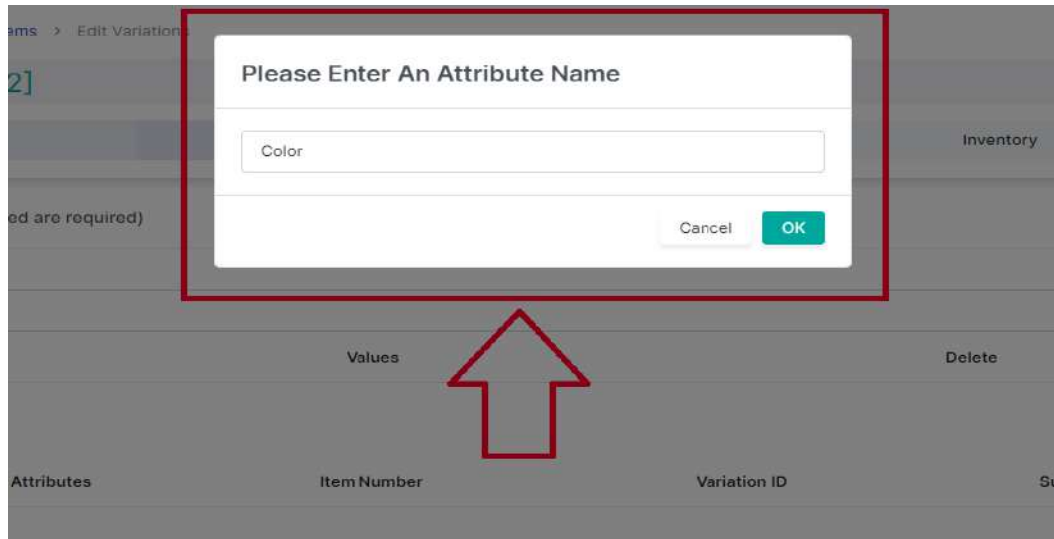


4. Now you will see the variation page where you can add product variation.  
**Example: Product Color.**

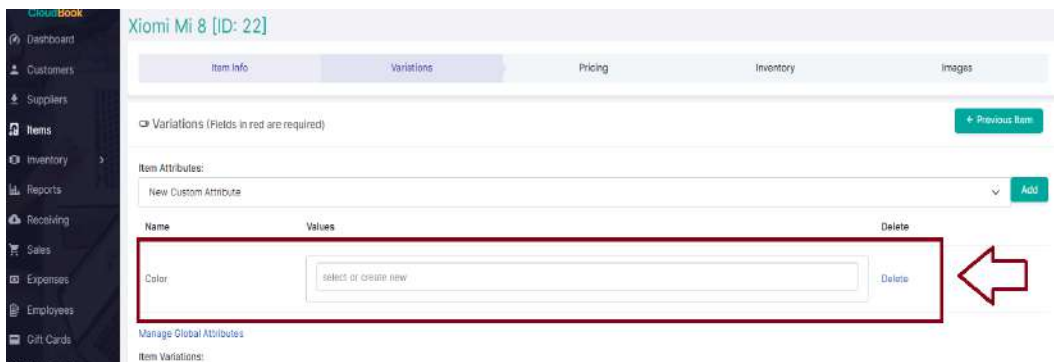
First, create **New Custom Attribute**



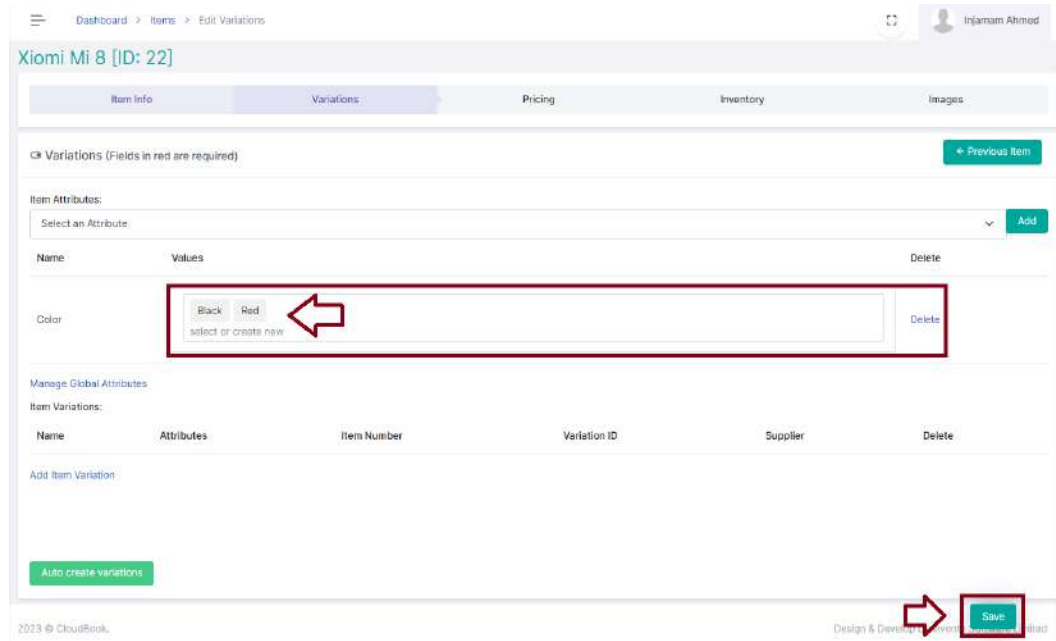
5. Then create a new **Attribute Name**



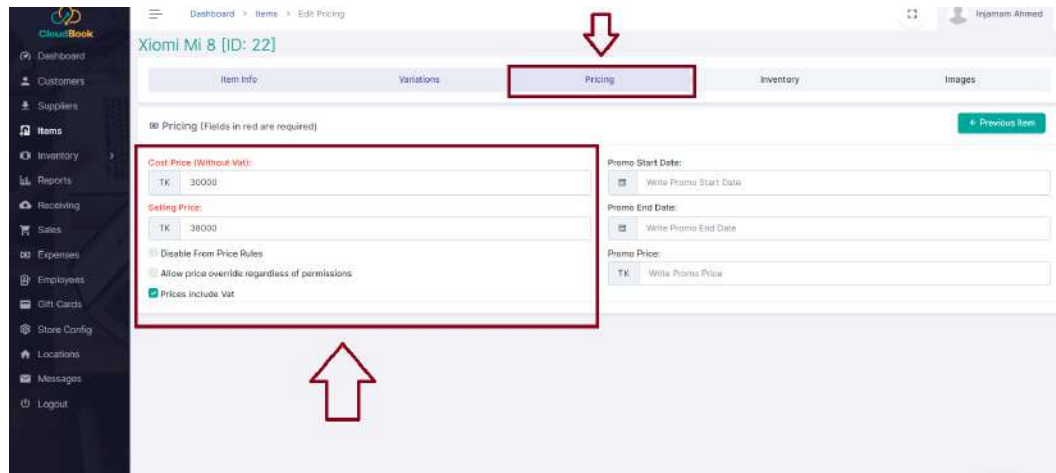
6. A new field has been created



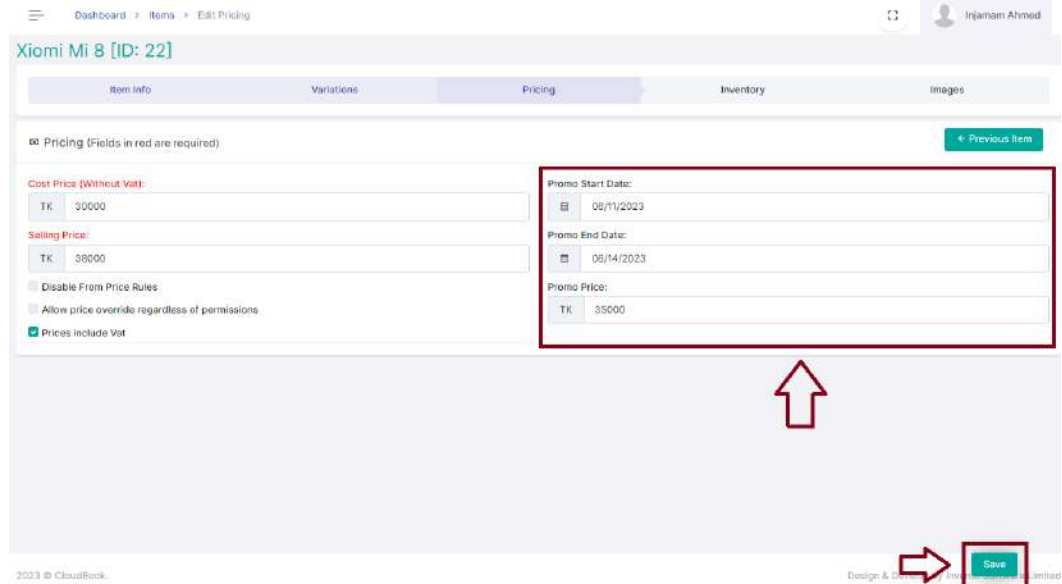
7. Now fill up that newly created field by adding the variation, For **Example, Red & Black**, you can make more variations if required. Now click on the **Save** button



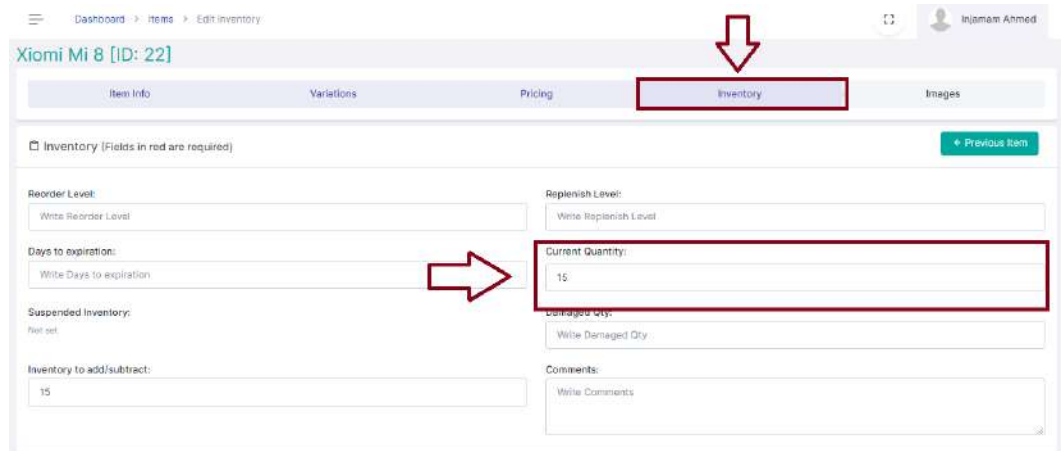
8. Now the **Pricing Section** will appear, Fill up the required fields for accurate accounting and price management.



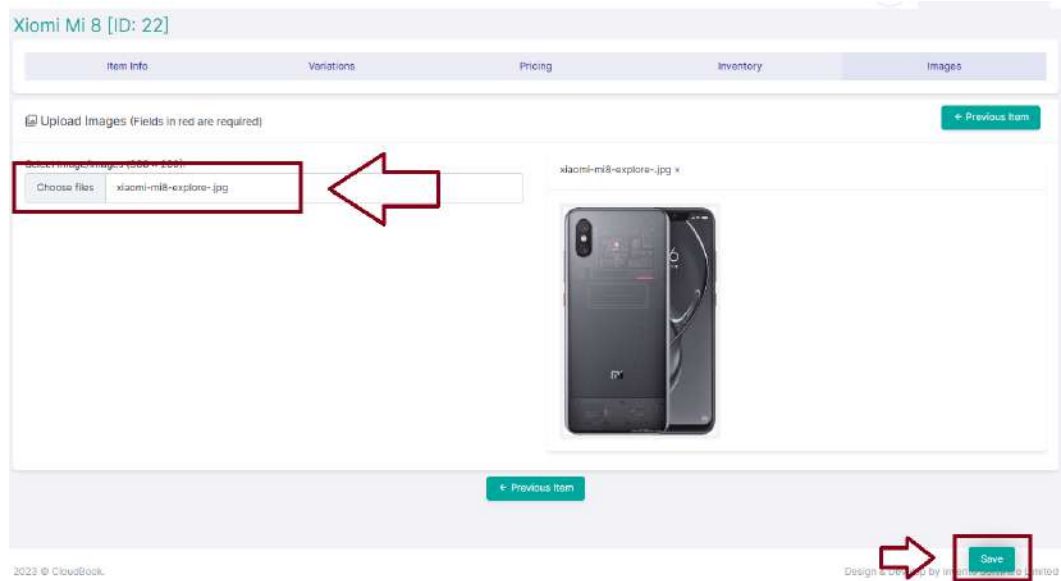
9. Here you can add the promotional price for a certain period of time. Click the **Save** button after everything is done.



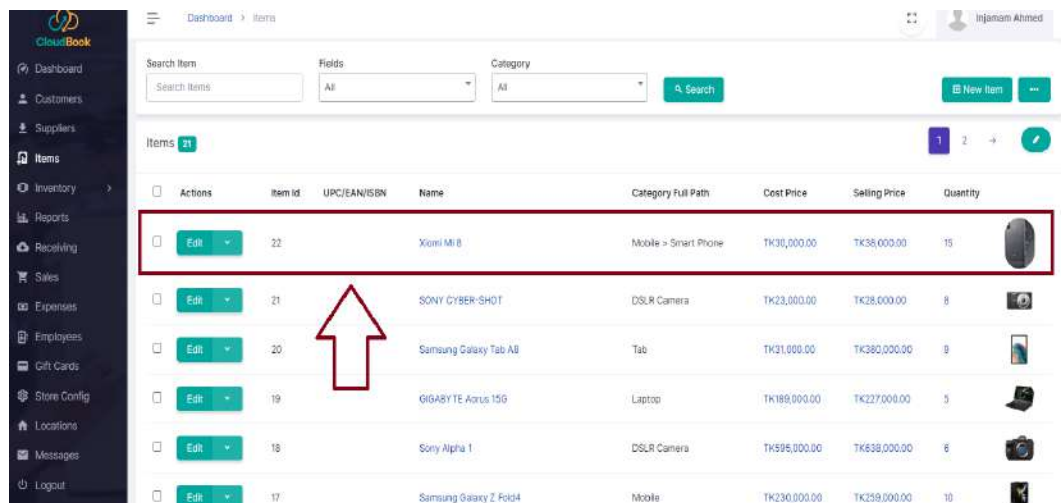
10. Now you are in the **Inventory** section, to create inventory manually, put the number of products in the **Current Quantity** section and press the save button.



11. Now you can add the product picture in the **Picture** section and add your location. Click on the **Save** button.

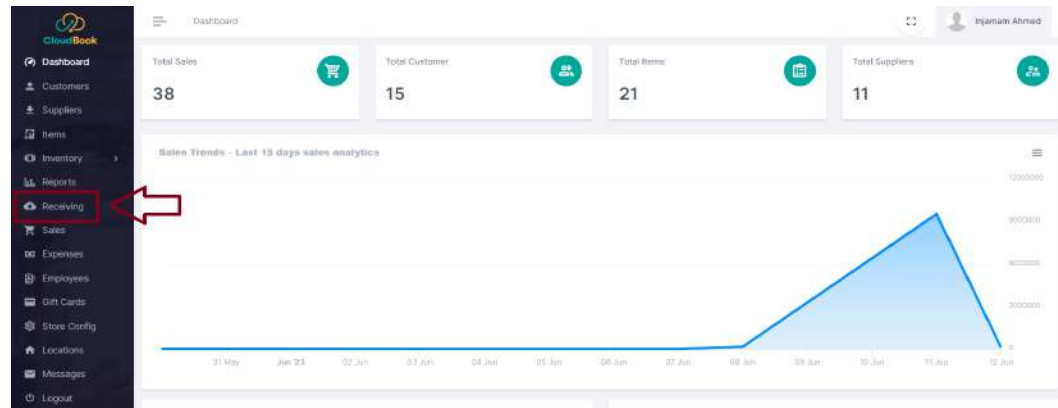


12. You successfully added the item/product in the CloudBook and can see the product on the list.



# How to Re-stock / Receive Products in CloudBook

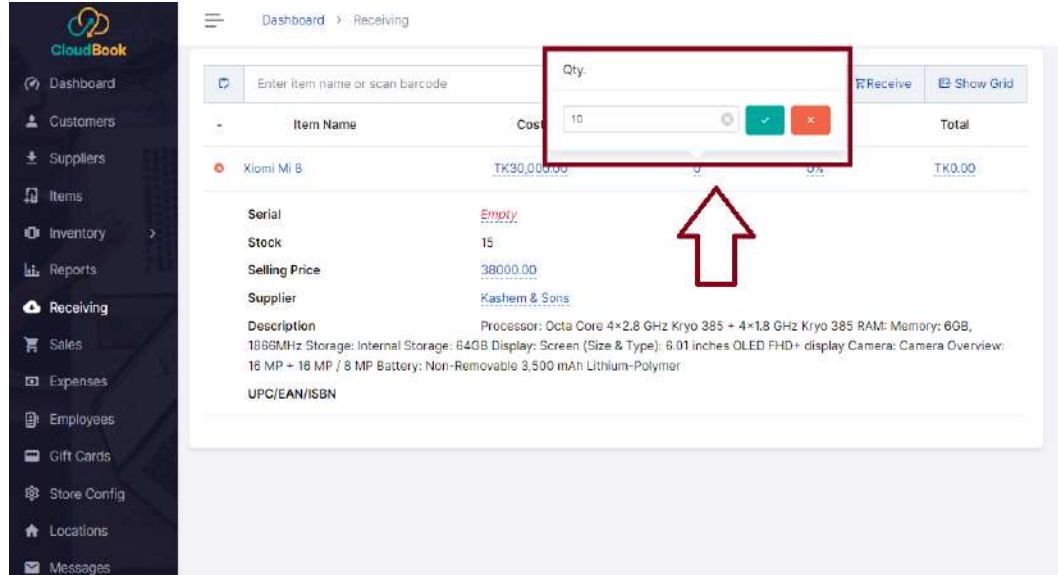
1. Log in to the CloudBook and click the **Receiving** feature



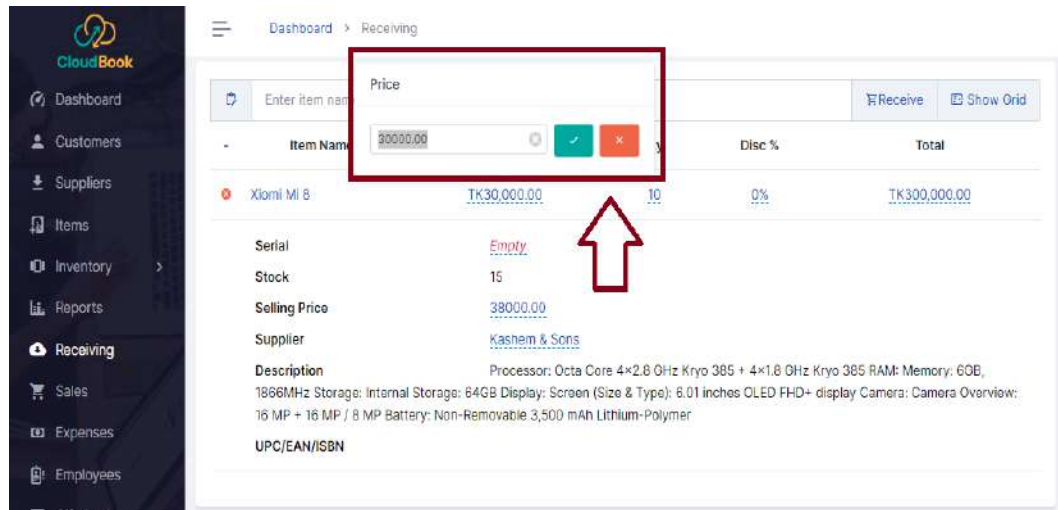
2. Write the product name in this box



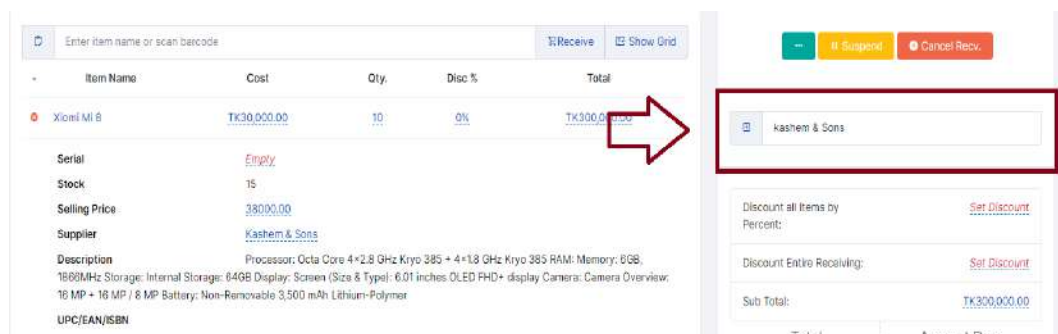
3. Now add the product quantity by clicking the **Qty** section



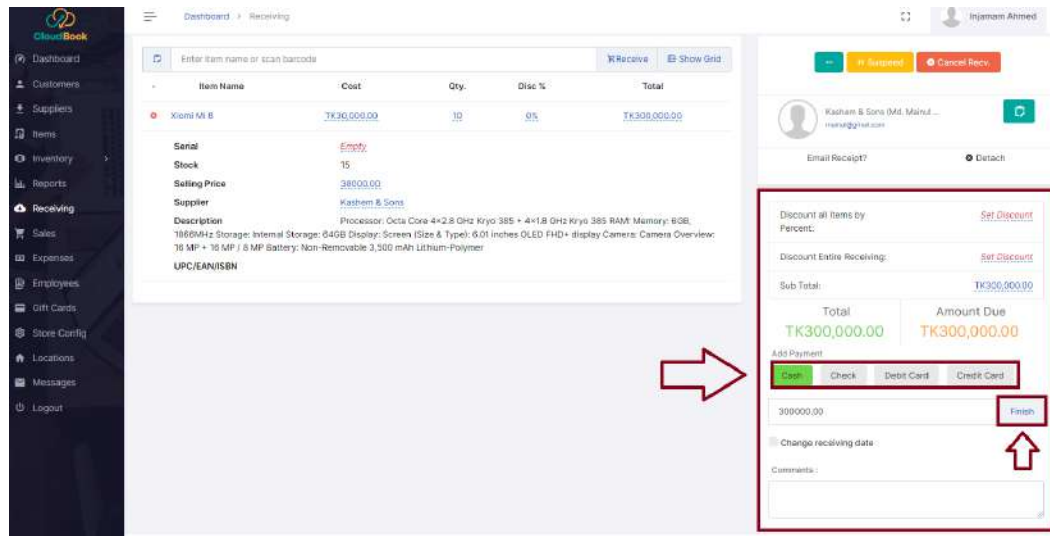
4. Add the new product purchase price in the **Cost** section



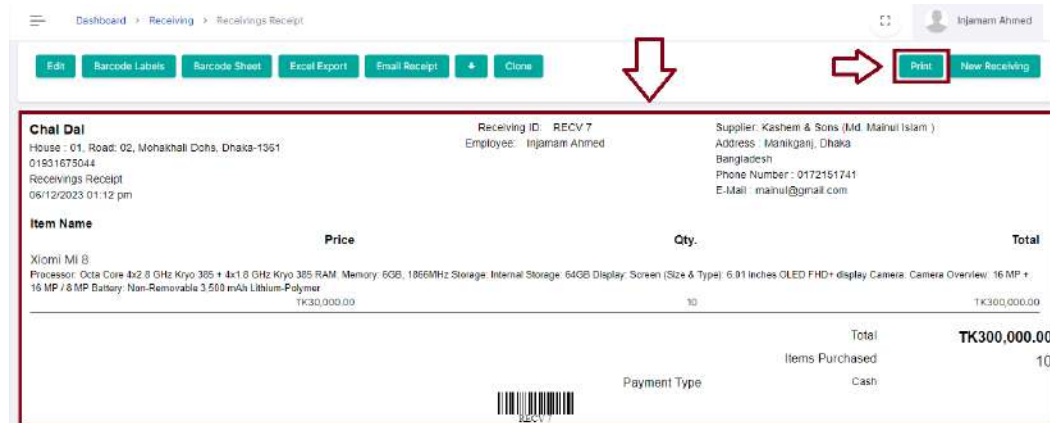
5. Enter the Suppliers name in this **Suppliers** section



6. Now you will see the total budgetary information here, now you can select the payment method and press the **Finish** button.



7. Now you can see the invoice, if you want you can print this document by clicking the **Print** button.

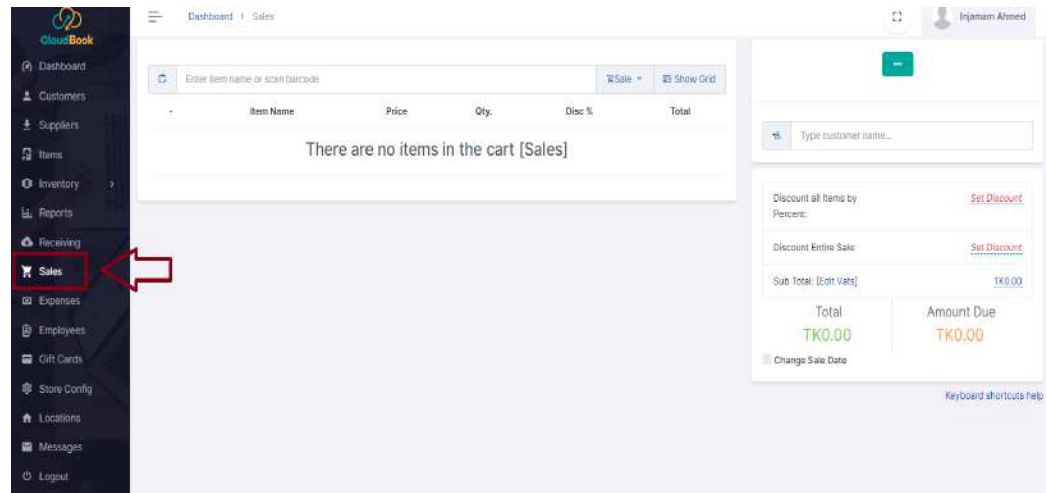


8. You have successfully restocked the product and if you want to restock another product you can easily do that by clicking the **New Receiving** button.

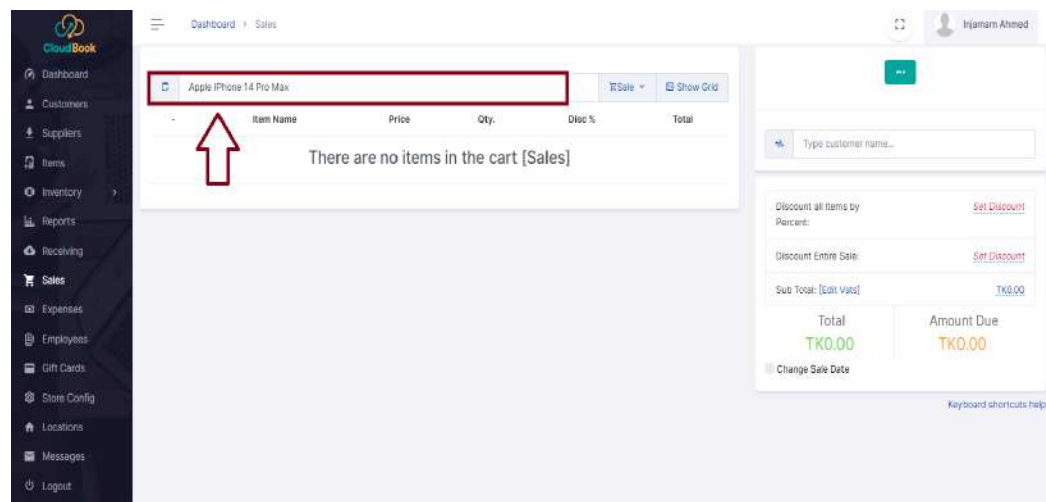


# How to Manage Sales Effectively in CloudBook

1. Log in to the CloudBook and click on the **Sale** feature

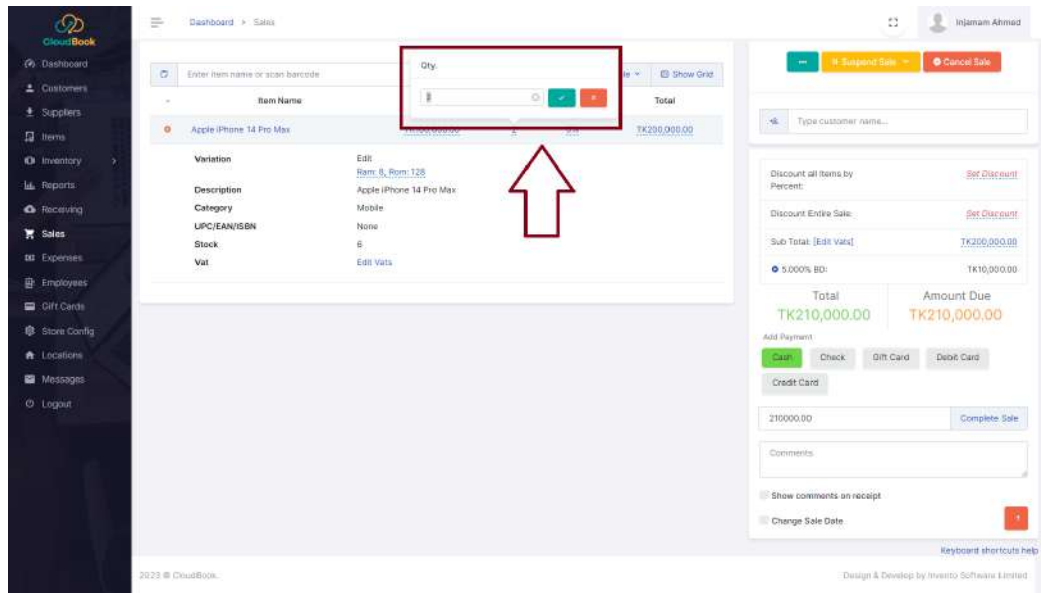


2. Now enter the product name here which you previously added to the CloudBook software

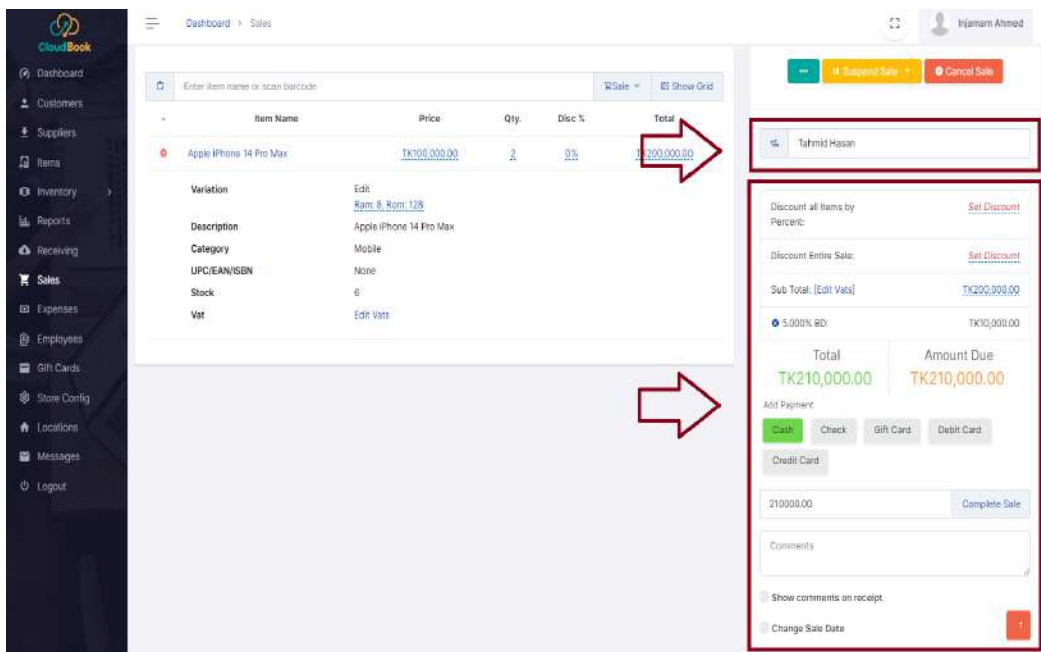




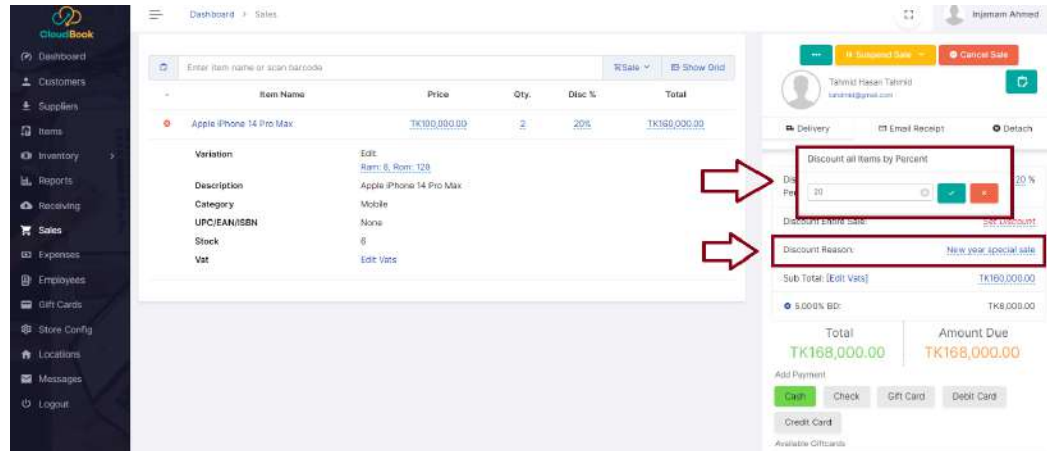
### 3. You can add product quantity here



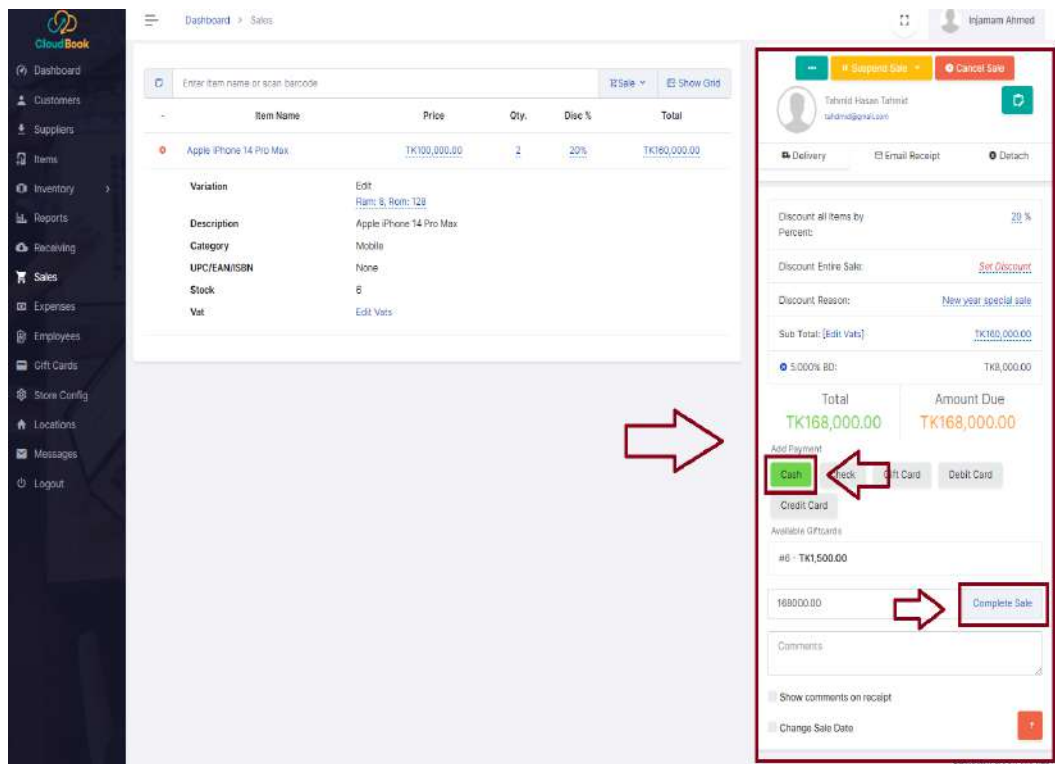
### 4. Now you have to put your **Customer Name** which you have added to this software before. And you will see the **Total Price** below.



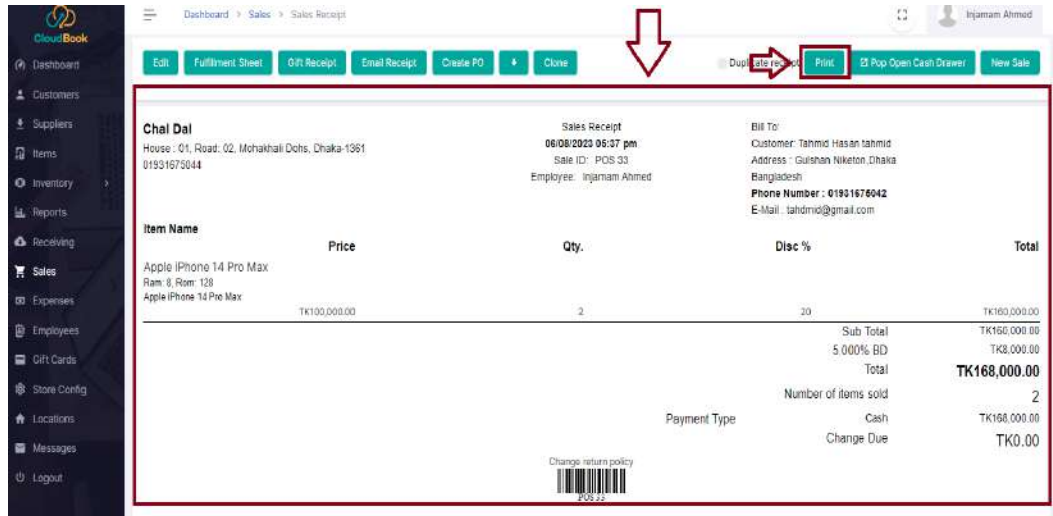
5. You can make a **Discount** in this section, and you can write the **Discount Reason** below.



6. You can see the full information here, now select the payment method and click the **Complete Sale** button.

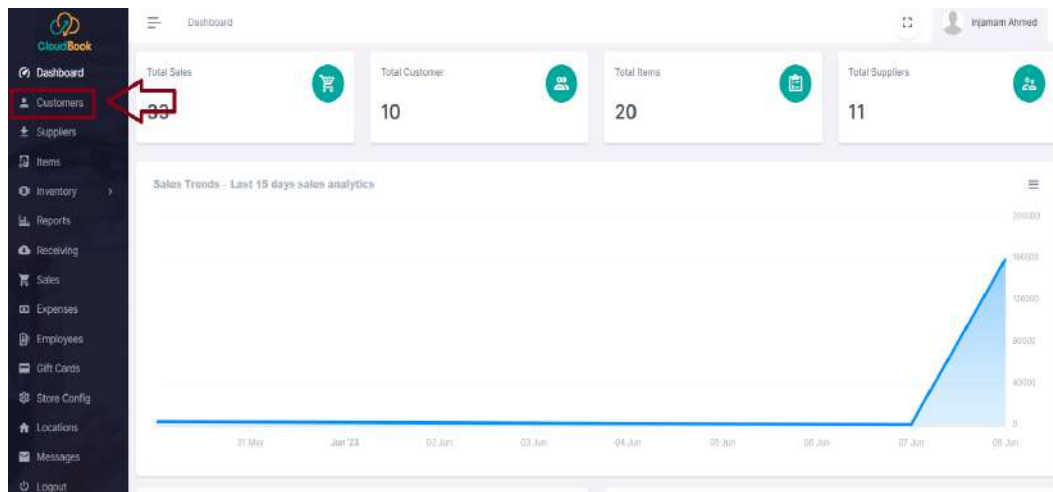


7. After completing the sale you will see the invoice, and you can print it by clicking the **Print** button.

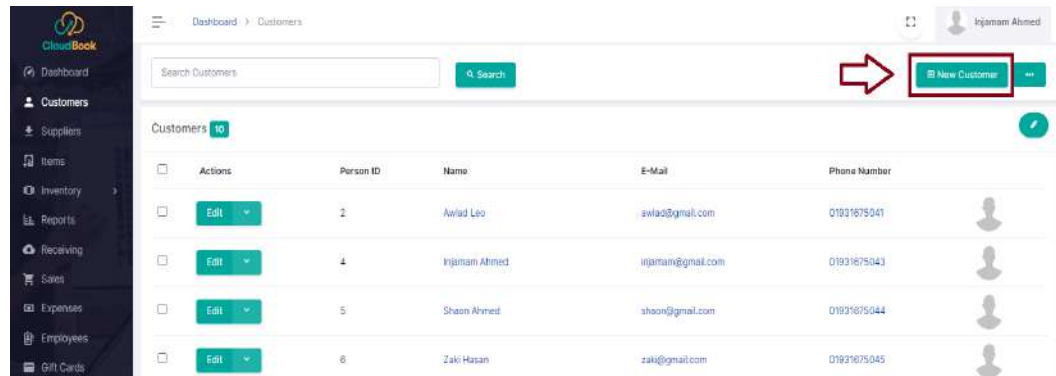


## How to manage Customers in CloudBook

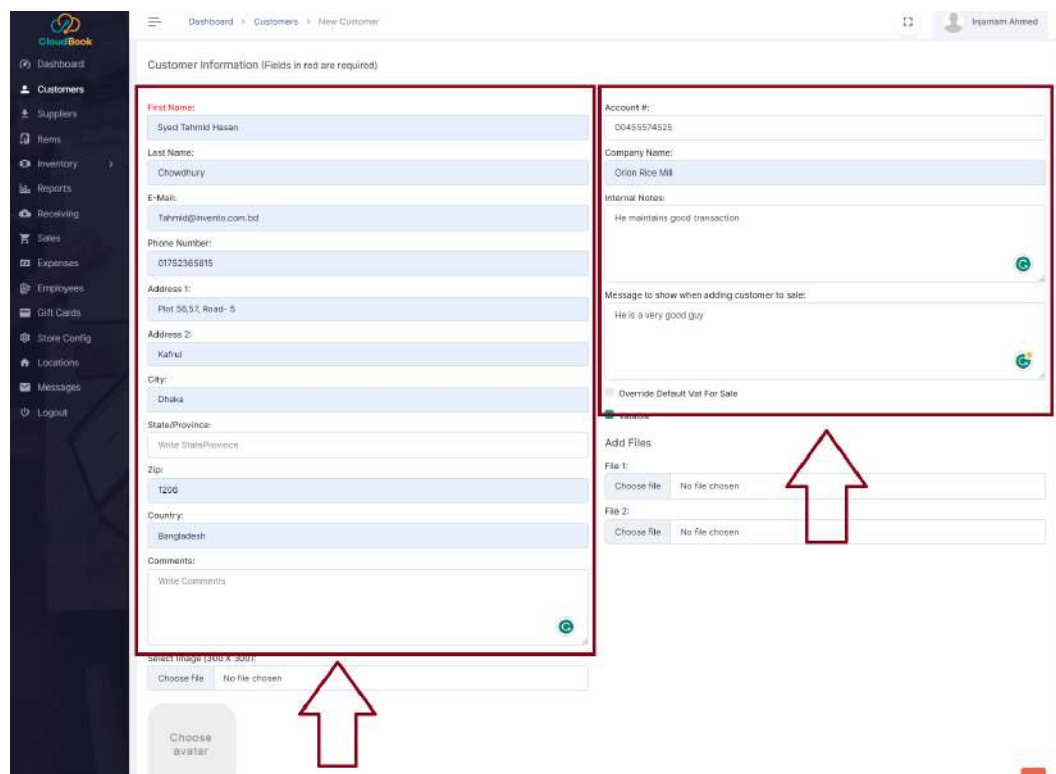
1. Log in to the CloudBook and click on the **Customers** feature



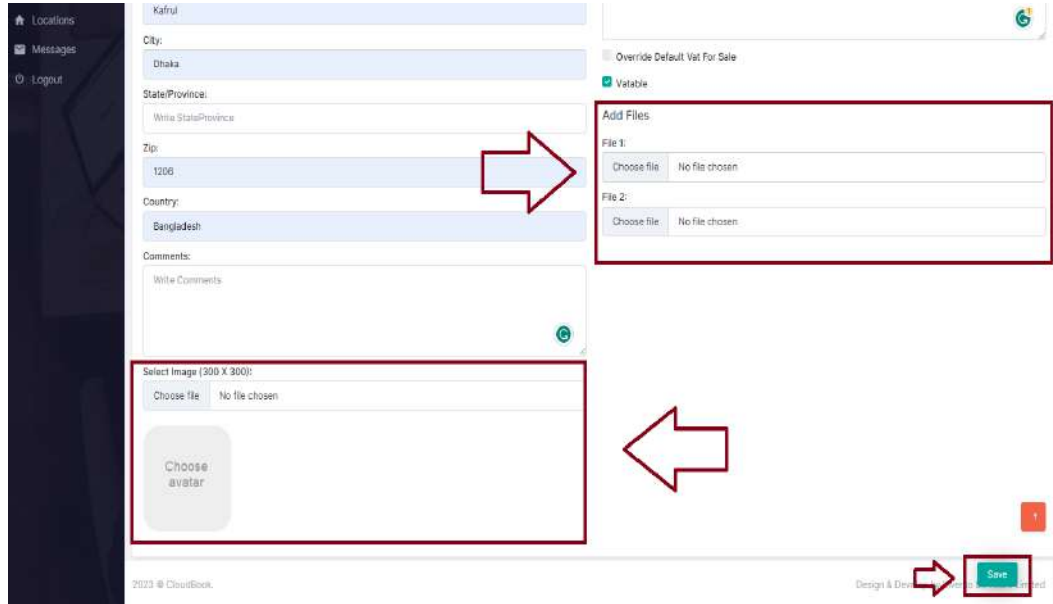
## 2. Click on the **New Customer** button



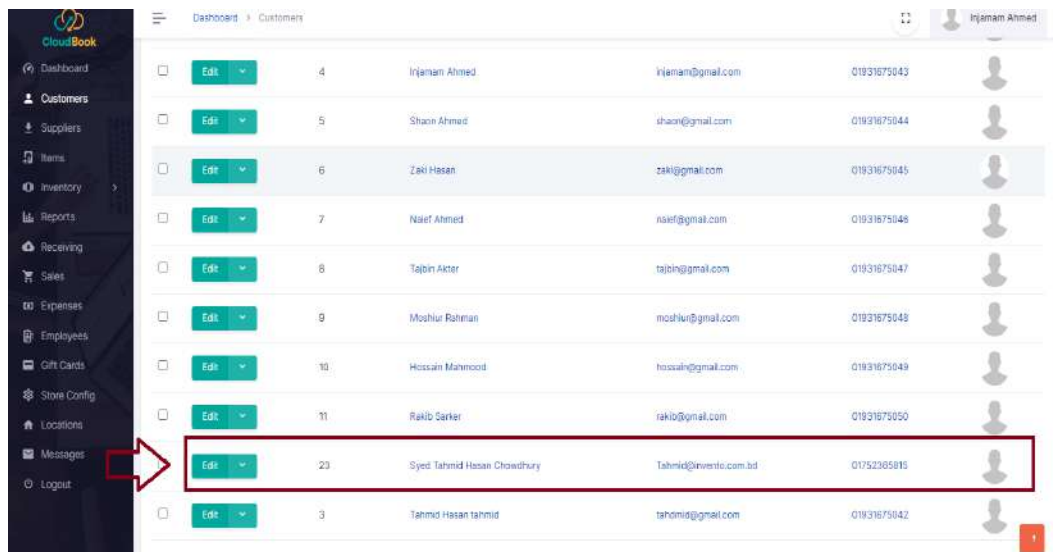
## 3. Fill up the necessary fields



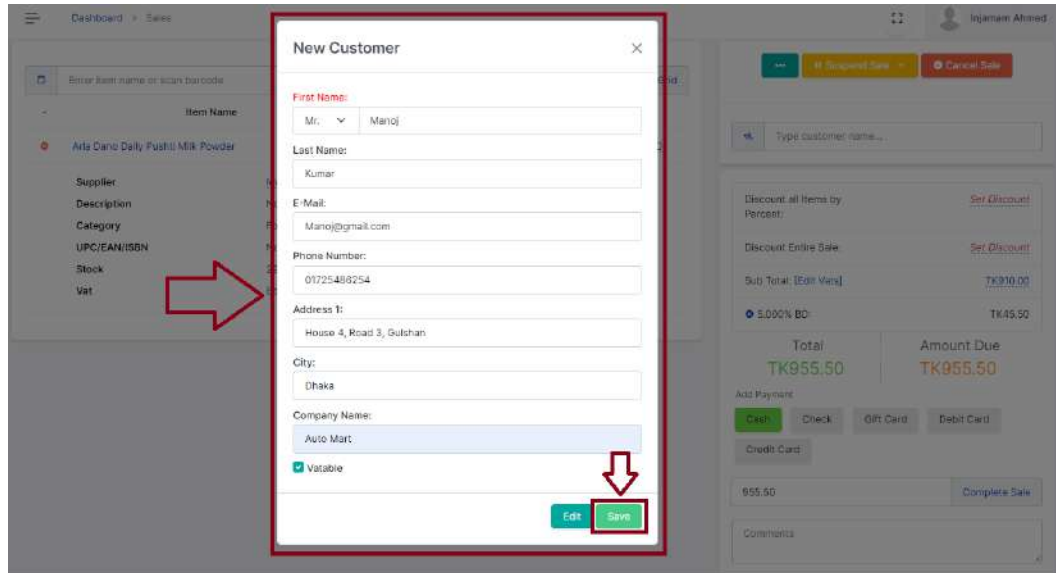
4. You can attach the customer image and other documents here, and after adding everything click on the **Save** button



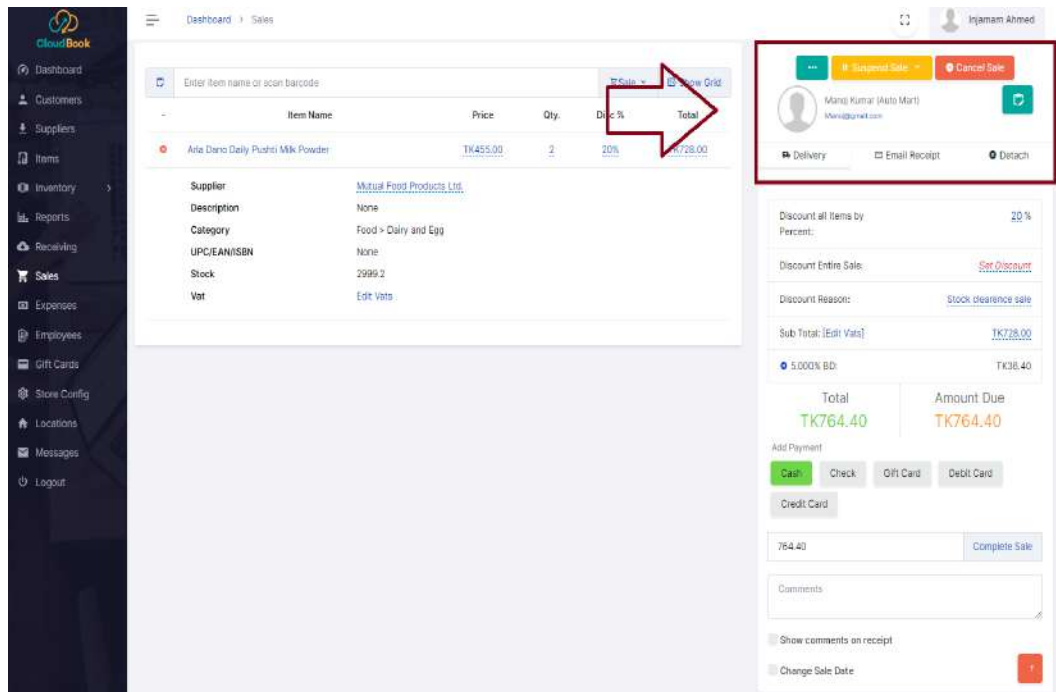
5. You have successfully added a customer and you will see your customer in this list.



6. Also you can add customers shortly when you are in a hurry in the queue list. Go to the **Sale** feature and add any product from your list.

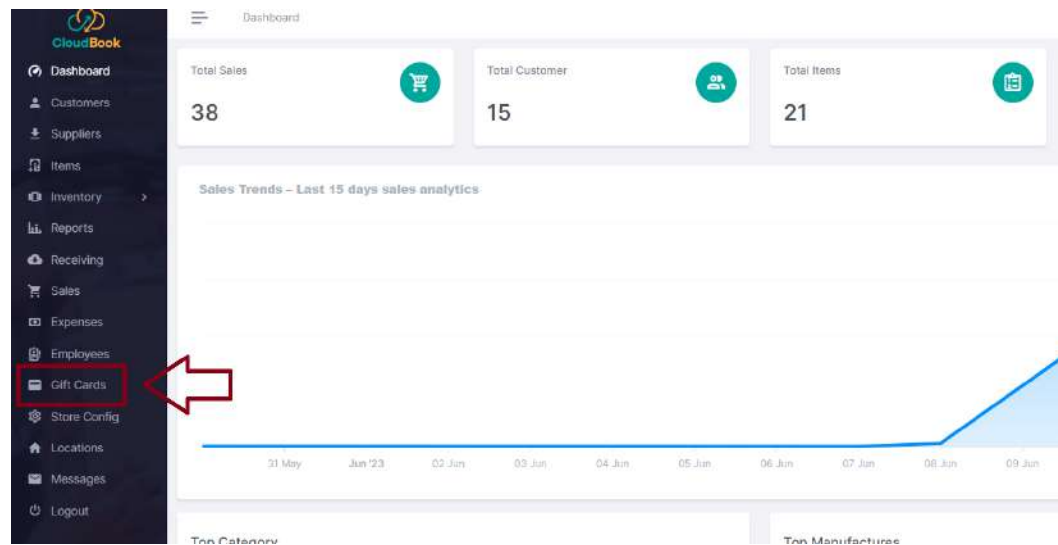


8. Now you can see your newly added customer's name and you can complete the sale.

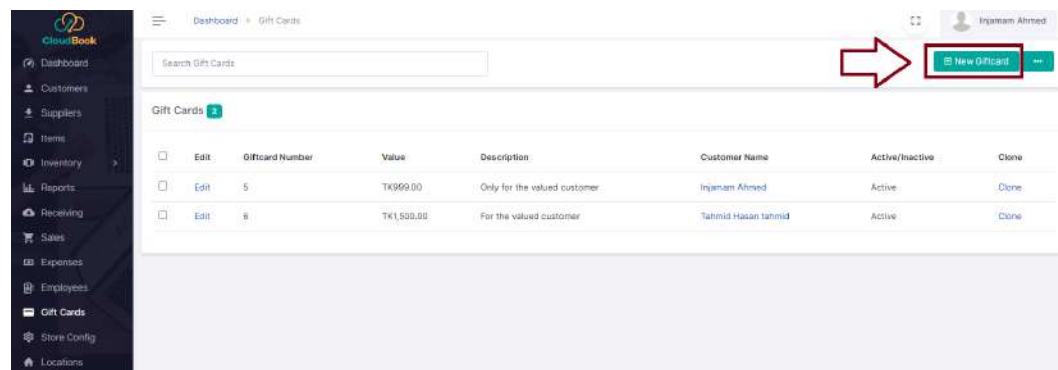


# How to manage Gift Cards In CloudBook

1. Log in to CloudBook and click on the **Gift Card** feature.



2. Now click on the **New Gift Card** Button



3. Now give a unique number in the **Gift card number** section. / Provide an amount in **Value** that you want to use in the gift card./ In the **Description**

**section**, write a gift card providing the reason./ In the **Customer name** section write the **Customer's name**./ Now click on the **Save** button.



Dashboard > Gift Cards > New Giftcard

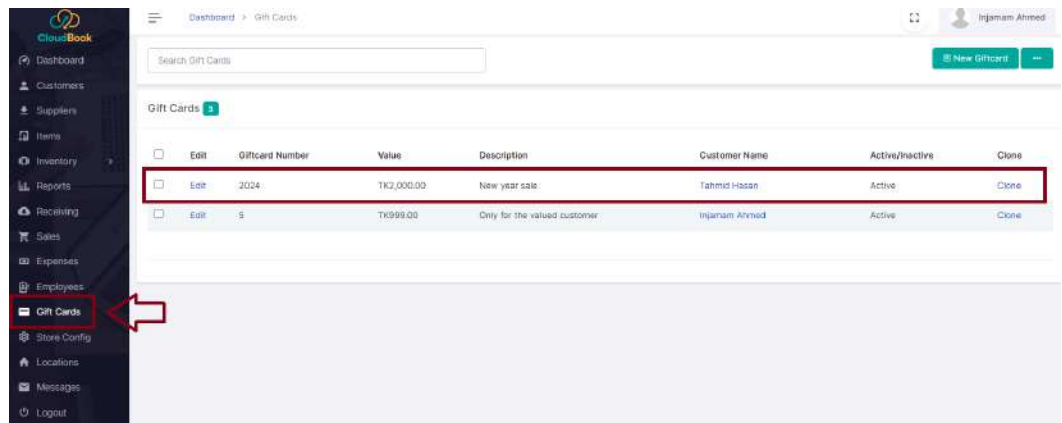
Giftcard Information (Fields in red are required)

Giftcard Number: 2024	Value: 2000
Description: New year sale	Customer Name: Tahmid Hasan tahmid (3) (01931675042)

Giftcard Log:

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4. You have successfully added a gift card, now you can see your offer in the **Gift card** section.



Dashboard > Gift Cards

Search Gift Cards

New Giftcard

Gift Cards 3

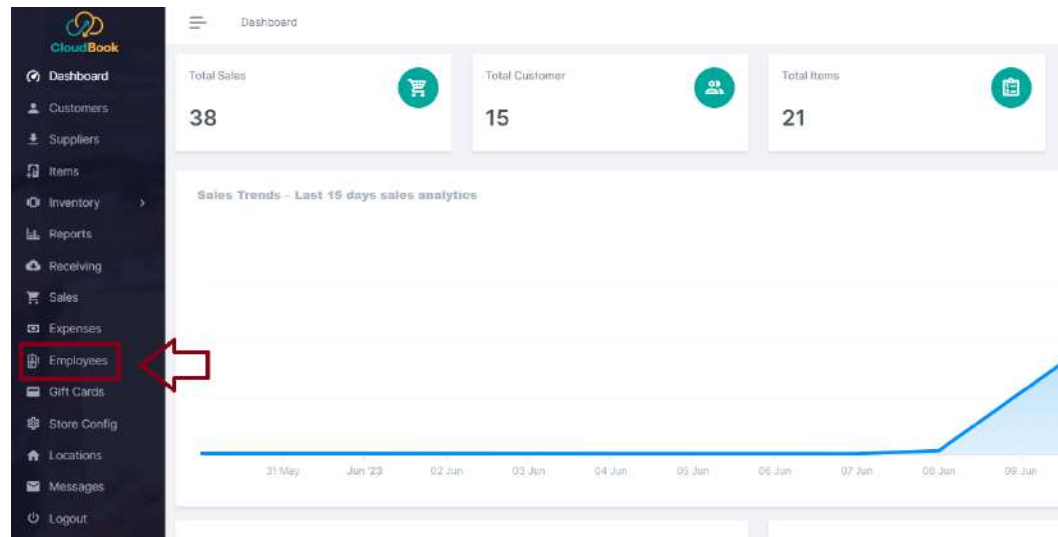
<input type="checkbox"/>	Edit	Giftcard Number	Value	Description	Customer Name	Active/Inactive	Clone
<input type="checkbox"/>	Edit	2024	TK2,000.00	New year sale	Tahmid Hasan	Active	Clone
<input type="checkbox"/>	Edit	5	TK999.00	Only for the valued customer	Injamam Ahmed	Active	Clone

Gift Cards

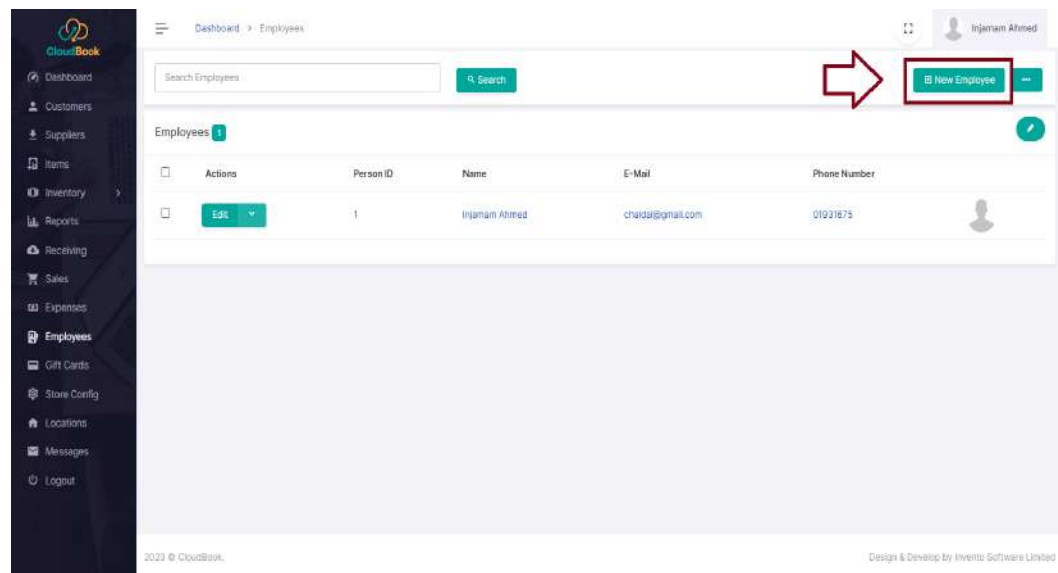


# How to manage Employee In CloudBook

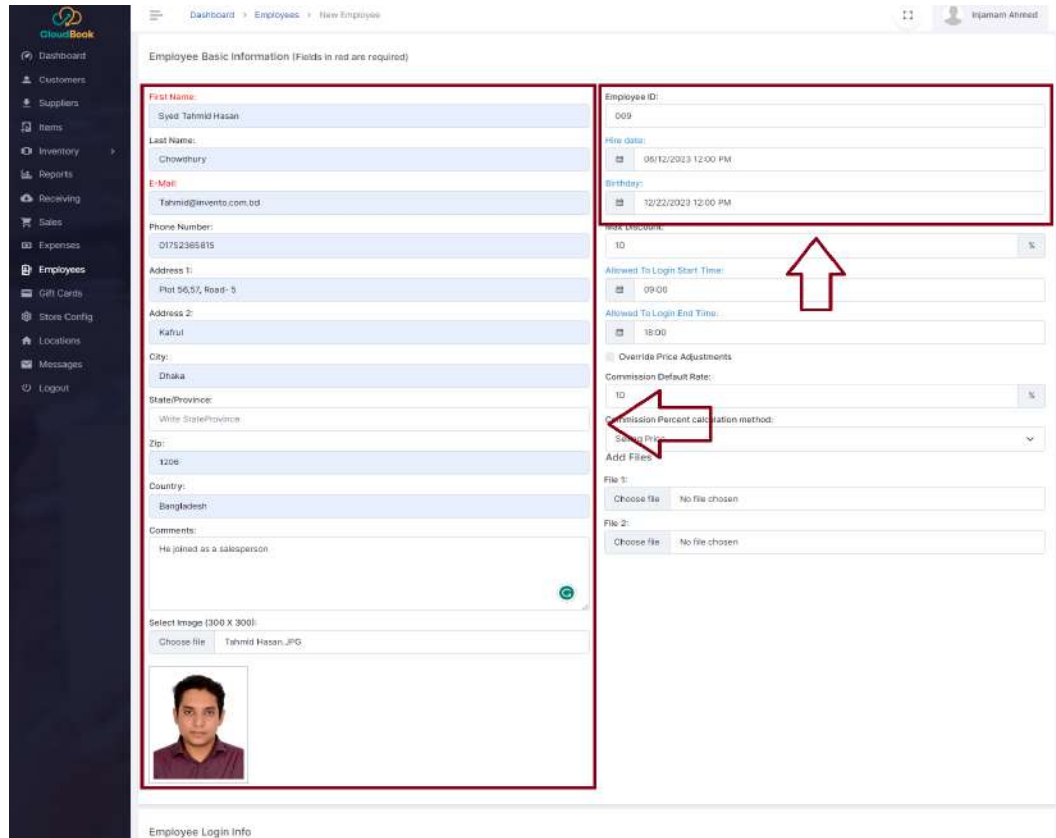
1. Log in to CloudBook and click the **Employees** feature.



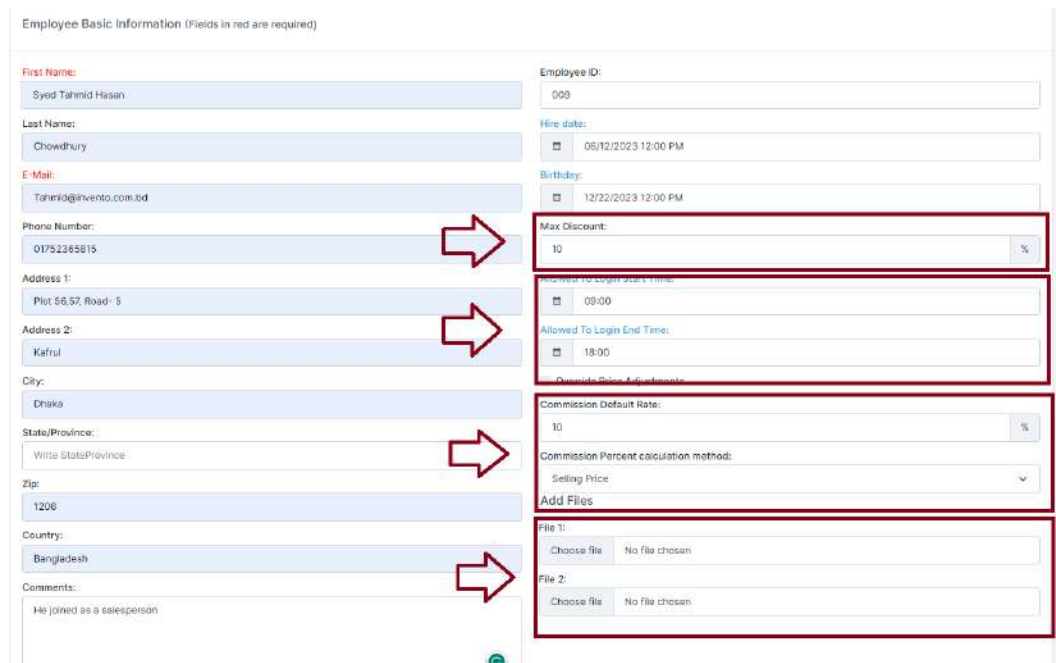
2. Click on the **New Employee** button



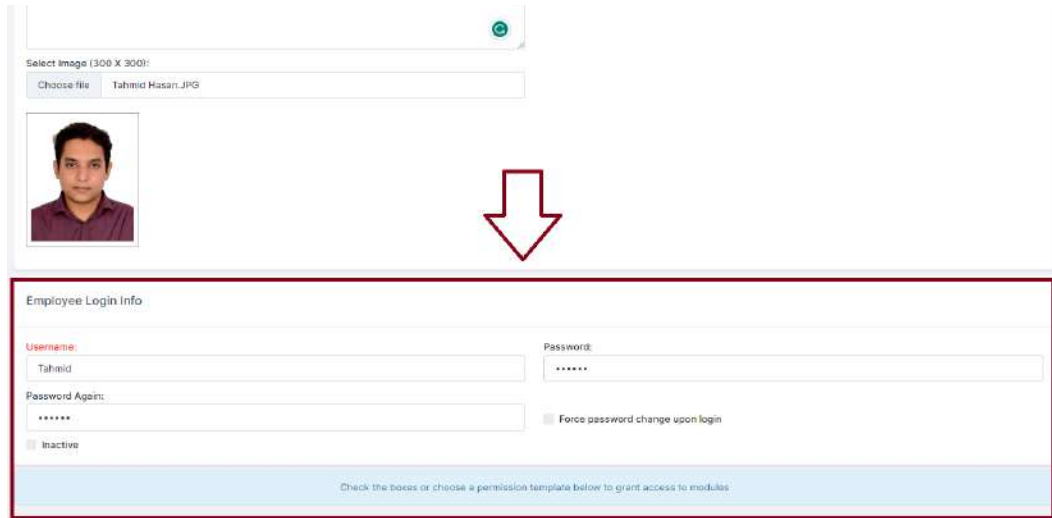
### 3. Fill up the required fields with information



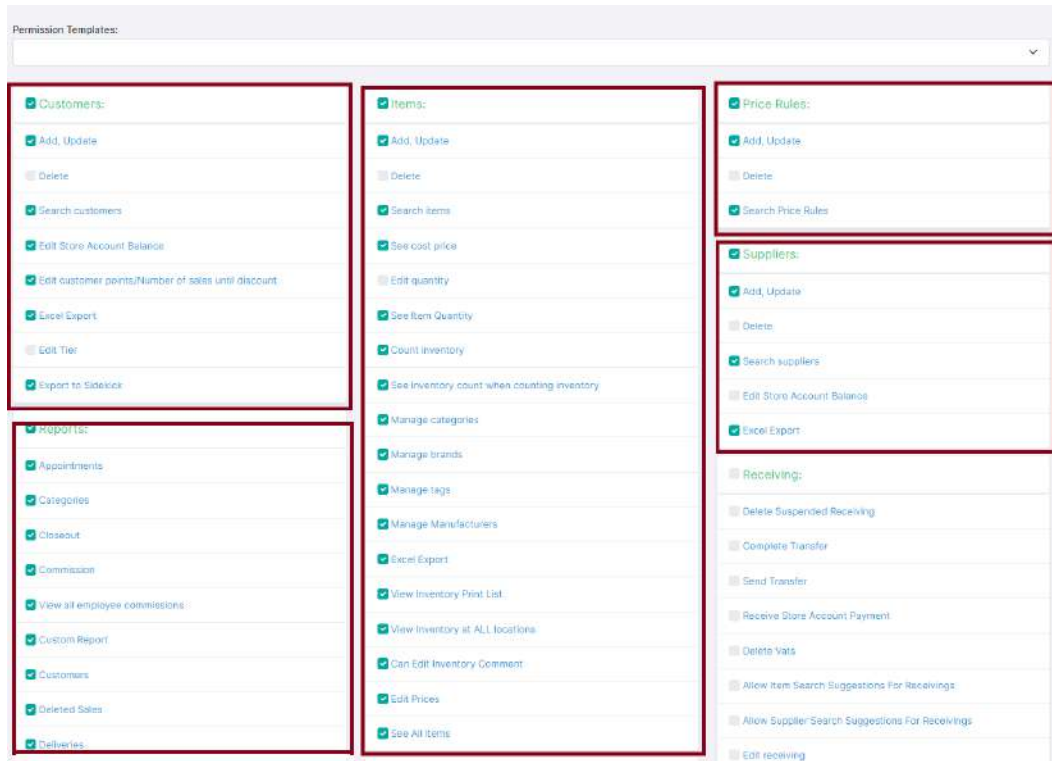
4. You can add the discount percentage, His log-in & log-out time, commission rate, and commission type in these fields. Also, you can attach the employee's NID and CV.



5. Now you have to set the employee login username and password in this area.

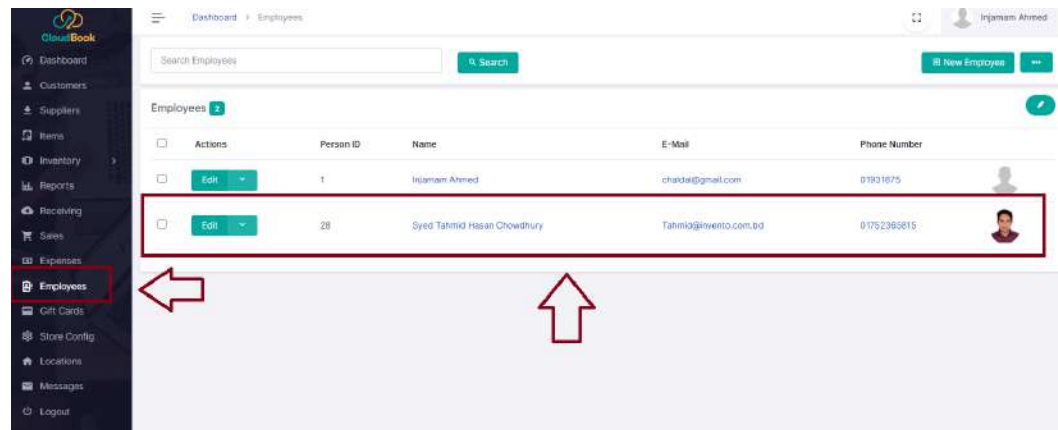


6. Now you will give permission that an employee can access the necessary area. Based on the employee's work type you have to give him access permission.



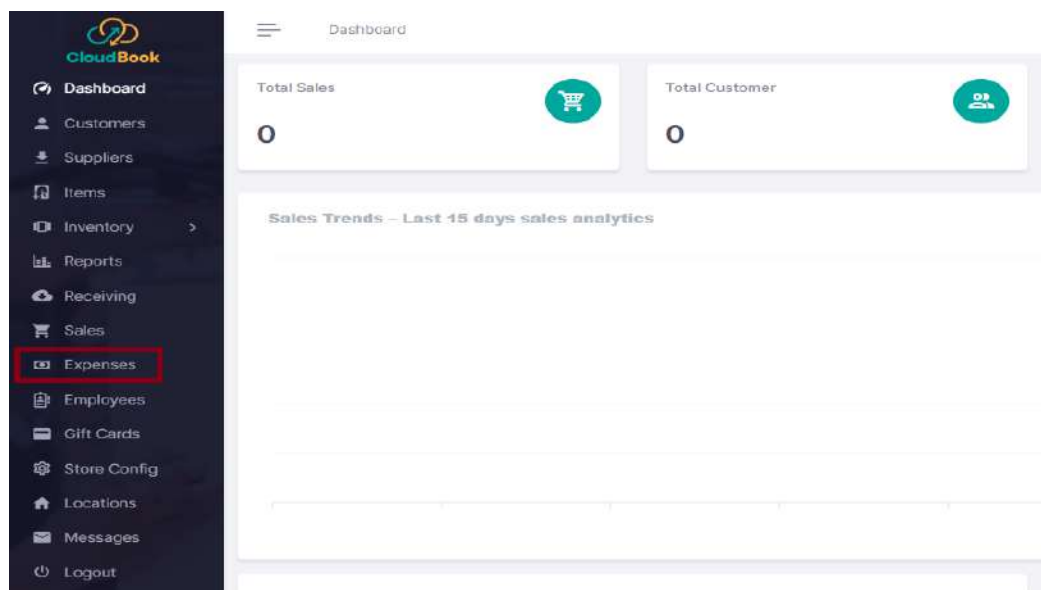
7. After giving your necessary permission Click on the **Save** button. You have successfully added an employee to CloudBook.

8. Now you can see your newly added employee in the **Employees** list.

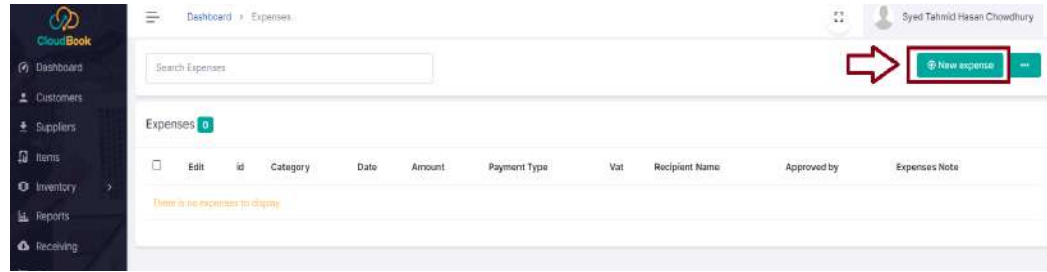


## How to manage Expenses in CloudBook

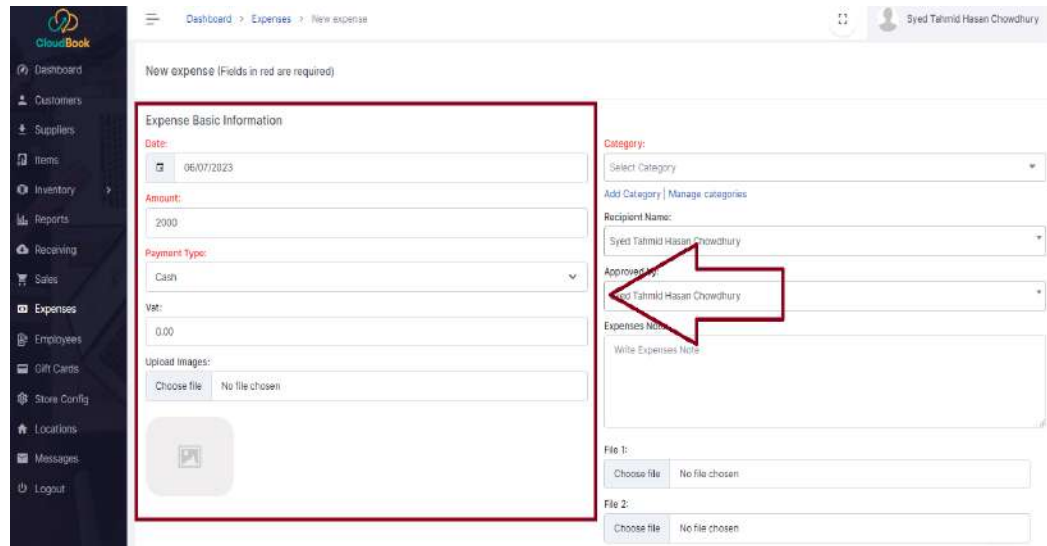
1. Log in to the CloudBook and click the **Expense** feature



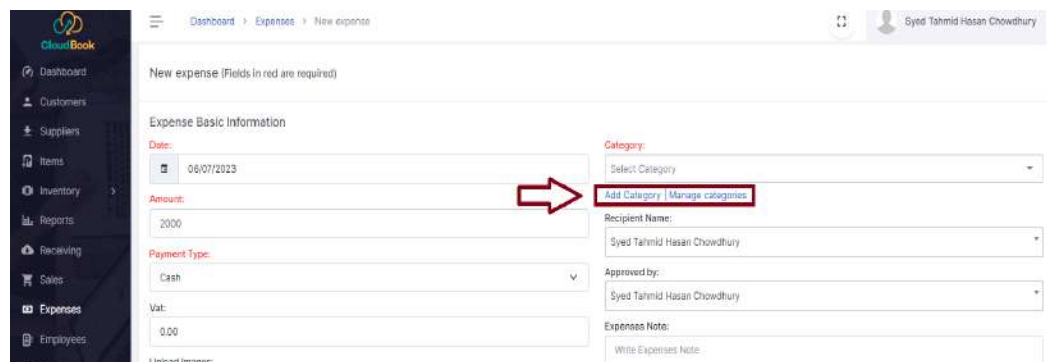
. Now Click on the **New Expense** button



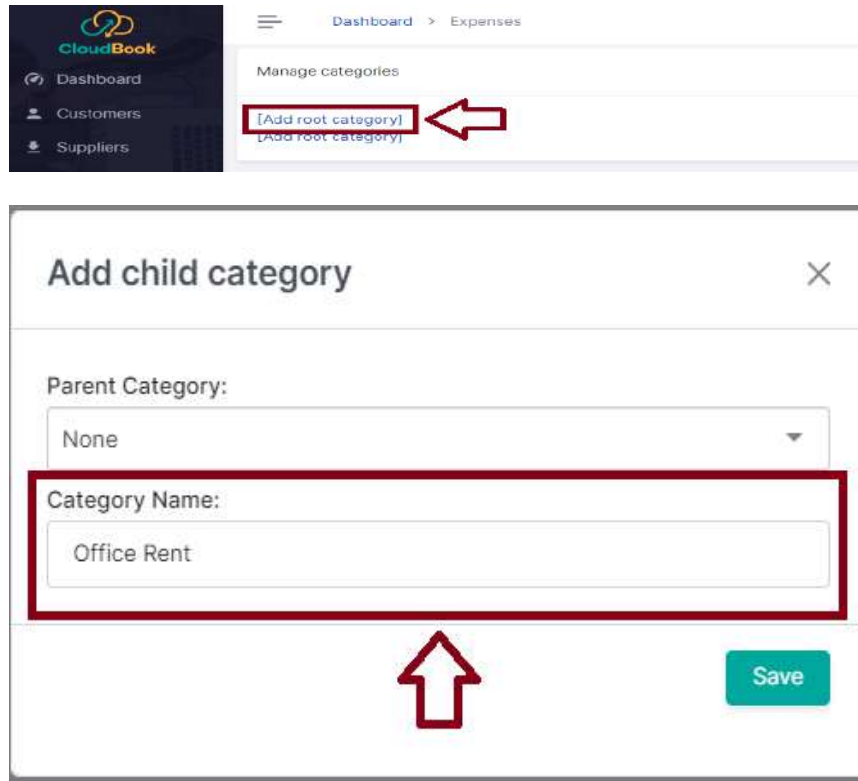
3. Fill up the necessary information



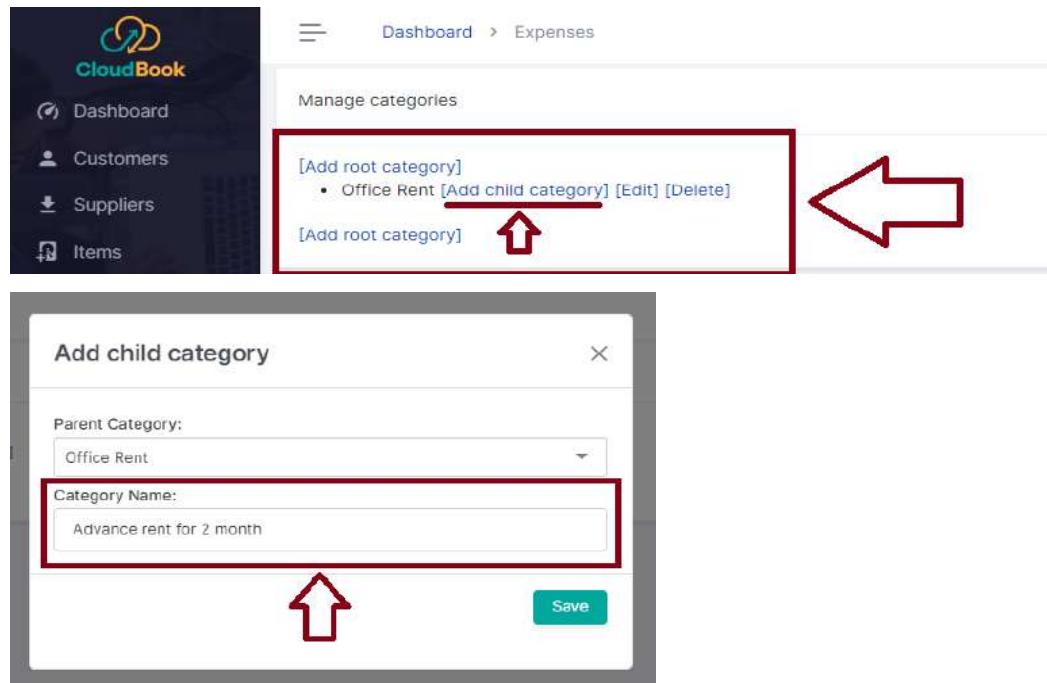
4. Select the category, and if you need to create a new category, you can easily create a new category by clicking on the **add/ manage category** button.



5. Write the category name and click on the **Save** button



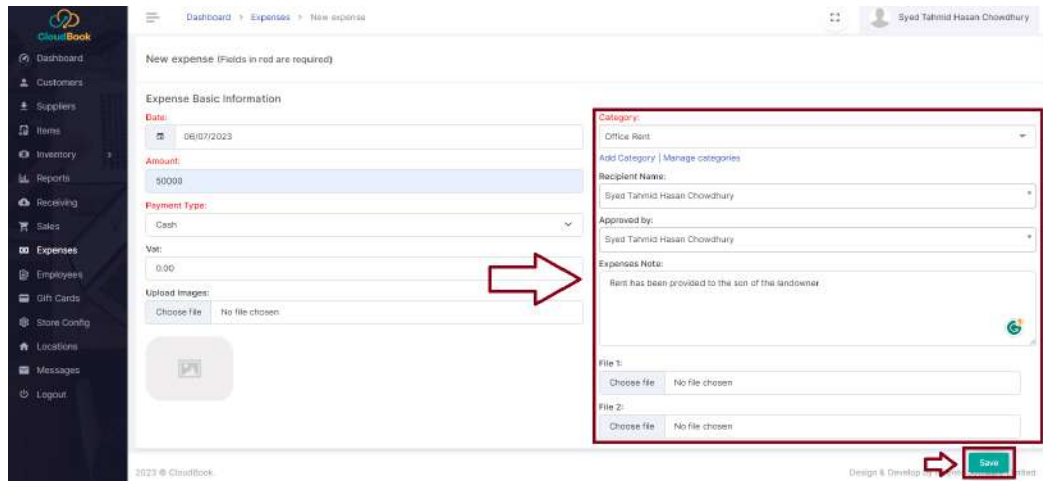
6. You can create a subcategory by clicking **Add Child Category** and creating another category.



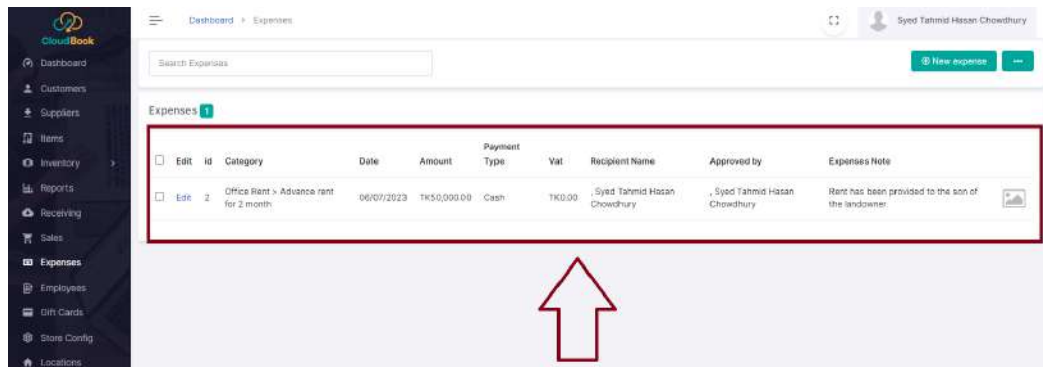
7. Now you can see the 2 categories main category and subcategory then you can go back to the expense page.



8. Fill up the other information and click the **Save** button



9. Your expense has been created.



# Thank you for being with CloudBook!

We wish you all the very best

