BMS Suite — Subscriber Training Guide

BMS Suite · bmssuite.online · Revised 2026-08-03

Welcome to BMS Suite. This guide walks you through every part of the system, module by module, so you can run your whole business — inventory, sales, invoicing, services, purchasing, production, quality, finance, and payroll — from one place, in English or Swahili and in your own currency.

Read it start-to-finish the first time, then use it as a reference. Inside the app, the **AI assistant** (bottom-right, "BMS AI Assistant") can walk you through any module interactively — click **System training** in the chat to begin.

Getting started

Creating your account

1. Go to the sign-up page and enter your **company name**, **username**, **email**, and **password**.
2. Your organization workspace and a **Main Warehouse** are created automatically, and you become the **admin**.
3. Verify your email from the link we send, then log in.

Your free trial

- Every new organization gets a **7-day free trial**, starting the moment you create the account.
- During the trial you can use **one user** and **one warehouse**. That's enough to evaluate the whole system.
- To continue after 7 days (and unlock more users/warehouses), activate a **license key** from the **Subscription** page.
- Lifetime plans are one-time purchases; monthly and annual plans include the trial.

Finding your way around

- The **left sidebar** lists every module you have access to. What you see depends on your role and your plan.
- Your **role** is one of: **Admin** (full control of your organization), **Member** (limited to the modules an admin grants), or **Superadmin** (the platform owner).
- The **AI assistant** is always available bottom-right for questions and interactive training.

1. Dashboard

What it's for: a live snapshot of your business the moment you log in.

The dashboard summarizes your key numbers — income, expenses, net position, stock alerts, and recent activity — pulled straight from the other modules. It's read-only: it reflects what you record elsewhere. Use it as your daily starting point to spot low stock, cash position, and anything needing attention.

2. Inventory

What it's for: tracking every product and how much you have, where.

Core concepts

- **Products** are the things you stock. Each is either a **Finished product** (something you sell) or a **Raw material** (something consumed by a service or production recipe).
- **Warehouses** are physical locations. Stock is tracked per product *per warehouse*.
- **Stock on hand** is the live quantity. **Low-stock threshold** triggers a "Low stock" warning when quantity drops below it.
- Costs use **Weighted Average Cost (WAC)** — when you receive stock at different prices, the system keeps a rolling average cost automatically.

Adding a product

1. Go to **Inventory → Add Stock**.
2. Choose **Finished product** or **Raw material**.
3. Enter name, optional SKU, and a QR/barcode (leave blank to auto-generate one).
4. Set selling price, buying price, optional discounted price, and the low-stock threshold.
5. Save. The product now appears in the stock list.

Bulk import

- Download the **Stock add template** from **Inventory → Excel Templates**, fill in your rows, and upload it under **Add Stock → Bulk upload**. The system reports how many rows imported and lists any errors.

The stock list — finding things fast

The **Stock** tab has a filter bar: search by name/SKU, filter by **type**, **warehouse**, **stock status** (in stock / low / out), and **price range**. Filters combine, and "Clear filters" resets them.

- **Click any product name** to open its detail card: identifiers, pricing, total on hand, and a per-warehouse breakdown with estimated value.
- **Download CSV** exports exactly what your filters currently show.

Working with many products at once

- Tick the **checkbox** on rows (or the header checkbox to select a whole page).
- A bulk action bar appears: **Export selected** (CSV of just those) or **Delete N** (admins only). "Clear selection" dismisses it.

Stock taking (physical counts)

1. Download the **Stock-take template** (pre-filled with system quantities) from **Excel Templates**.

2. Enter your actual counted quantities and upload under **Stock Taking & History**.
3. The system shows every discrepancy (surplus/shrinkage). Add a reason and **Approve** or **Skip** each line — approving adjusts the system quantity to match your count.

Batches, transfers, and stakes

- **Batches**: traceable lots (from purchases or QC-passed production) with expiry tracking.
- **Stock Transfer**: move quantity between warehouses. Admins can **freeze** all transfers org-wide (e.g. during an audit).
- **Stakes**: reserve/pledge stock for a purpose so it isn't sold by mistake; release it when done.

3. Sales & Invoicing

What it's for: recording what you sell — products *and* services — and issuing invoices.

One search box for products and services

On the **Sales** page, the search box finds **both products and services**:

- Type a name, SKU, or scan a QR code.
- Selecting a **product** adds it to the cart.
- Selecting a **service** opens the service sale panel (see below).

Selling products (the cart)

1. Search and add each product to the cart.
2. For each line set the **warehouse**, **quantity**, **unit price**, and an optional **per-line discount**.
3. If a discount pushes the price below cost, you'll see a **"Selling below cost"** warning — a safeguard, not a block.
4. The cart shows a running total (discounts subtracted).
5. Optionally mark the sale **on credit** (customer pays later) and set a contact + due date.
6. Click **Record & issue invoice**. Stock is deducted, the sale is booked to income, and an invoice is generated.

Selling services

When you pick a service from the search box, a panel opens showing its **raw-material requirements** and current stock:

- Set quantity, optional discount, customer, and account.
- If any required raw material is short, the sale is **blocked** and the missing materials are named with their stock levels — because selling the service would consume materials you don't have.
- Recording the sale **deducts the raw materials** from stock and books the revenue.

Invoices, credit, and returns

- Every sale appears under **Sales & invoices** with its invoice; open it to view/print a receipt. All invoices are also collected in the **Invoices** module (next section).
- **Credit sales** (receivables) are tracked with amounts owed, paid, and remaining; record payments against them as customers pay.
- **Process a return**: pick the invoice, enter quantity and reason — stock and revenue are reversed accordingly.

4. Invoices, Proforma & Quotations

What it's for: one place for all your commercial paperwork — the invoices generated by your sales, plus the **quotations** and **proforma invoices** you issue *before* a sale.

The four tabs

Open **Invoices** and switch between:

- **All** — everything together.
- **Invoices** — sale invoices, created automatically whenever you record a sale.
- **Proforma Invoices** and **Quotations** — the pre-sale documents you create here.

Click any row to open it. Sale invoices open as a printable receipt; quotations and proforma invoices open on a branded document sheet.

Creating a quotation or proforma invoice

1. Click **+ New Quotation** or **+ New Proforma Invoice**.
2. Enter the **customer name** (required), and optionally their email, contact, and a **Valid Until** date.
3. Add **line items**: start typing a description to search your stock — picking an item fills the unit price, which you can still edit freely. You can also type a completely custom line that isn't in stock.
4. Use **+ Add line** for more items. The total updates as you type.
5. Add **notes** if needed, then click **Create**.

Documents are numbered for you, per year: `QUO-2026-0001` for quotations, `PRO-2026-0001` for proforma invoices.

Tracking and sending

- Open a document to set its **status**: Draft, Sent, Accepted, Rejected, Expired, or **Converted to Sale** — then **Save**.
- Click **Print / Save PDF** to produce a clean copy to send or file.
- The **payment instructions**, **authorised signatory name**, and **signature image** printed on these documents are set once by an admin under **My Account → Business document details**.
- All amounts use your **organisation currency** (set in My Account).

> **Important:** a quotation or proforma invoice is paperwork only — it does **not** move stock or book income. Nothing hits your inventory or finances until you record the actual sale on the **Sales** page.

5. Services

What it's for: defining services you offer and (optionally) the raw materials they consume.

Defining a service

1. Go to **Services → Manage services → New service** (admin).
2. Enter a name, description, and price.
3. Add **ingredients** — the raw-material products consumed each time the service is sold, with quantities. (A service with no ingredients is always sellable.)

Stock-aware availability

- Services that depend on raw materials are **automatically deactivated** when any required material runs out, and **reactivated** automatically once you restock — so you never sell something you can't deliver.
- In the manage list, each service shows a **Stock** badge: **Ready**, **Stock short**, or **No materials**.
- You can also manually deactivate a service; the system won't override your manual choice.

Selling a service

Record service sales from the **Sales** page (search for the service) — see the Sales section above. Service sales appear in the Services history and in your income.

6. Purchases

What it's for: recording stock you buy from suppliers, which increases inventory and records the cost.

1. Go to **Purchases**.
2. Record a purchase order: choose the **product**, **warehouse**, **quantity**, and **unit cost**.
3. On save, the system:
    - Increases stock in the chosen warehouse.
    - Updates the product's **Weighted Average Cost**.
    - Records the purchase as an **expense** in Finance.
    - Optionally creates a **batch** for traceability.

Purchases are the correct way to bring stock in — this keeps your costs, inventory, and financials consistent.

7. Production

What it's for: turning raw materials into finished products using recipes (bills of materials).

- Define what a finished product is made of (its raw-material ingredients and quantities).
- Create a **production order** for a quantity to make.
- As production runs, the required **raw materials are consumed** from stock, and on completion the **finished goods** are added to stock (typically after passing Quality Control).
- Production orders move through states (planned → in progress → awaiting QC → done).

Use Production when you manufacture or assemble goods rather than buying them finished.

8. Quality Control

What it's for: inspecting production output before it becomes sellable stock.

- Production output can require a **QC inspection** before it's added to finished stock.
- Record a **pass/fail** result (and grade) for each inspection.
- Failed or scrapped quantities are tracked separately so they don't enter sellable inventory.
- Passing QC creates the finished-goods **batch** and makes the stock available.

QC is the gate between "made" and "sellable," giving you traceability and scrap visibility.

9. Finance

What it's for: the money view of everything — accounts, income, expenses, and reports.

Accounts

- Set up **accounts** for where money sits: **Cash**, **Bank**, **Mobile Money**, or **Credit**.
- Each has an opening balance; the current balance updates automatically as income and expenses post to it.

Income and expenses

- Most income/expense entries are created **automatically** by other modules — a sale books income, a purchase and payroll book expenses, all against the account you choose.
- You can also record **manual** income and expenses (e.g. rent, utilities) and categorize expenses.
- Because posting is automatic and consistent, your financial totals always reconcile with your operational activity.

Reporting periods

- Members may be limited to a maximum reporting period (e.g. this month); admins are unrestricted. This is set by your organization.

10. Reports

What it's for: analytics and exports across the business.

- View summaries such as sales performance, inventory valuation, discount tracking, and financial reports.
- Choose the **period** for time-based reports.
- **Export** report data to CSV/Excel for sharing or deeper analysis.
- The **Discount Tracking** report, for example, shows total discounts given and a per-product breakdown so you can see where margin is going.

Reports are read-only views built from your live data — nothing you do here changes records.

11. Payroll

What it's for: paying employees with correct statutory deductions (Tanzania).

Employees

- Add each **employee** with their monthly salary and applicable rates.
- The system supports **Tanzania PAYE** (progressive income tax for residents), **NSSF/PSSF** social-security contributions, and custom deductions like **HELSB** or a **union fee**. Non-resident and non-Tanzania cases use a manual tax rate.

Running payroll

1. Create a **payroll run** for a given month/year.
2. **Generate payslips** — the system computes gross pay, each deduction, and net pay per employee.
3. **Post** the run against an account. This books:
    - Net wages as a **Salaries & Wages** expense (and debits the chosen account).
    - PAYE tax and employer contributions as separate expense lines.
4. A run can only be **posted once** — double-posting is rejected, so your books stay clean.

12. Team & Access (admins)

What it's for: managing who can use your workspace and what they can see.

- **Create users** in your organization (up to your plan's limit — the trial allows one user total): username, email, and password. Either tick **Org admin** (full access plus user management) or choose the **modules** a member may use.
- New members are emailed a **verification link** and cannot log in until they verify their email address. The link can be re-sent if it expires or goes missing.
- **Customise tabs** (per user): adjust their allowed **modules**, which **sidebar tabs** they see, and their **finance-period limit**. Changes save immediately and apply to that user in real time.
- A member with **no modules** selected sees no business modules at all — grant at least one.
- The **Services** module is visible to admins only.
- Promote a member to **admin** (or demote), or **deactivate** a user to revoke access without removing them.
- **Delete a member permanently** (confirmation required): the account is removed, but all their records — sales, purchases, and so on — are retained.
- All money-critical actions are recorded in an **audit trail** (who did what, when) that organization users cannot delete.

13. My Account

What it's for: managing your own login, security, language, and your organization's currency, document branding, and subscription.

- **Profile**: your username, email, organization, and role.
- **Subscription**: shows your current plan or, during the trial, days remaining and the trial's 1-user/1-warehouse limits. Activate a **license key** here.
- **Language**: switch the interface between **English** and **Swahili (Kiswahili)** — the whole app is translated. Your choice is saved in your browser and affects only you.
- **Organisation Currency** (admins): choose from the common list — USD, EUR, GBP, TZS, KES, NGN, ZAR, UGX, GHS, RWF, EGP, MAD, INR, AED, SAR, JPY, CNY, CAD, AUD — or enter a **custom code**. It applies across invoices, reports, and every financial figure, for everyone in the organization.
- **Business document details** (admins): the **payment instructions**, **authorised signatory name**, and **signature image** (PNG/JPEG under 250 KB) printed on your quotations and proforma invoices.
- **Change password**: enter your current password and a new one (minimum 8 characters).
- **Danger Zone — delete account**:
  - If you're an **admin**, deleting removes access for your **entire organization**; a **member** deleting removes only their own access.
  - Deletion is confirmed with your password.
  - Your data is **retained for 60 days** and can be fully **recovered** from the account recovery page within that window. After 60 days it's permanently erased.

14. Subscription & licensing

What it's for: turning your trial into a paid plan and managing it.

1. Purchase a plan (monthly, annual, or lifetime) — payment via M-Pesa, Tigo Pesa, Airtel Money, or card.
2. You receive a **license key** by email.
3. Go to **Subscription** (or **My Account**), paste the key, and activate.
4. Your plan's **user and warehouse limits** and module access take effect immediately.

If a payment completes but you don't receive a key, contact support — keys can be re-issued.

Everyday tips

- **Bring stock in through Purchases** (or Production), not by editing quantities — that keeps cost and financials correct.
- **Set low-stock thresholds** so the dashboard warns you before you run out.
- **Use the search box on Sales** for both products and services — it's the fastest path to recording anything.
- **Watch service availability**: if a service shows "Stock short," restock its raw materials and it reactivates itself.
- **Export CSVs** from Inventory and Reports whenever you need to share or analyze data offline.
- **Ask the AI assistant** for step-by-step help on any module — click **System training** in the chat.

Getting help

- In-app **AI assistant** (bottom-right) — features, how-tos, and interactive **System training**.
- Email: **info@bmssuite.online** · Billing: **billing@bmssuite.online**
- Phone / WhatsApp: **+255 614 712 348**