

# GMCore

## Operations Manual

User guide for day-to-day desktop operations, controls, and administrative setup.

<b>Document</b>	Operational reference manual
<b>Edition</b>	Version 1.0
<b>Issued</b>	14 April 2026
<b>Prepared for</b>	UnoBot Industries

### Manual intent

This manual is designed to support structured use of GMCore for daily transactions, master data maintenance, reporting, backup, branding control, and license administration.

## DOCUMENT CONTROL

<b>Purpose</b>	Provide a professional operating reference for the main GMCore modules, their normal use, and the controls that support clean daily operations.
<b>Primary audience</b>	Store owners, branch staff, supervisors, encoders, and administrators who operate GMCore in day-to-day business workflows.
<b>Scope</b>	Desktop use of GMCore modules for customer and item master data, transaction entry, reporting, route handling, inventory-related work, printing, backup, branding, licensing, and updates.
<b>Out of scope</b>	Custom development work, API internals, server-side engineering, and deployment-specific implementation details.

### Manual conventions

- Module names are written exactly as they appear in the application where practical.
- Recommended sequence means the standard operating flow for most users, but supervisors may adapt it to local procedure.
- Plan restrictions should always be checked first when a button or module appears disabled.

### Quick start checklist

1. Confirm the active plan and the current route before entering transactions.
2. Maintain Customer Master and Item Master records before preparing new purchase orders.
3. Use Create Order for customer-facing transactions, then print the required document type.
4. Use Supplier PO and Inventory for procurement and stock adjustments where your plan allows.
5. Review reports and statistics regularly, then perform secure backup before major changes or restores.

#### Operating principle

GMCore works best when master data is maintained first, transactions are entered consistently, printed records are reviewed before release, and backup is performed routinely.

## 1. Product overview

GMCore is a desktop business operations system that combines master data maintenance, transactional document entry, printing, route-based organization, analysis, and administrative controls in one working environment. The application uses plan-based access control so that each device exposes only the modules available to the active license or demo state.

### Core functional groups

Group	Main modules	Operational intent
Daily operations	Customer Master, Item Master,	Maintain clean reference data and prepare

Group	Main modules	Operational intent
	Create Order	customer transactions.
Control and review	Reports, Statistics, Route Manager, Printing	Organize output, review activity, and control route-specific work.
Administration	Backup Manager, Branding, License Management, App Update	Protect data, standardize output, and keep the device operational.

## PLAN ACCESS AND CONTROL

GMCore uses plan-based module control. When a module is not available for the active plan, the related button is disabled and the interface shows the required plan level.

Plan	Included modules	Administrative note	Best fit
<b>Demo</b>	Normal application modules are available for evaluation, except Backup.	Admin is view-only except license management.	Trial and validation
<b>Starter</b>	Customer Master, Item Master, Create Order, Print, Backup.	Standard daily use with essential controls.	Basic operations
<b>Business</b>	Adds Supplier PO, Reports, Route, Statistics, Inventory, Advanced Branding.	Balanced plan for stores requiring stronger control and output standards.	Growing stores
<b>Enterprise / Pro</b>	Adds Agent tools, Website Sync, Mobile Sync, Parse PO, plus Business features.	Extended workflow and connected operations.	Advanced operations

### Important

In Demo state, the application remains usable for normal evaluation, but secure backup is not available and non-license admin actions remain disabled.

## STANDARD DAILY WORKFLOW

### Customer transaction flow

1. Confirm route, cashier context, and plan status before beginning work.
2. Create or update the customer record in Customer Master if the customer is new or requires correction.
3. Create or verify item records in Item Master, including unit, category, price, and barcode where applicable.
4. Prepare the transaction in Create Order, review quantities and totals, then save.
5. Print the required output using the selected document type and template.

### Procurement and stock flow

1. Use Supplier PO for supplier-side ordering and procurement preparation.
2. Review Inventory after supplier activity, adjustments, or route-based stock movement.
3. Use Reports and Statistics for review, then perform secure backup before major maintenance or restore work.

#### Control discipline

Avoid entering transactions before customer, item, and route data are clean. This reduces document corrections, pricing mismatch, and reporting noise.

## 2. Dashboard and navigation

<b>Module</b>	Dashboard
<b>Minimum access</b>	All active plans
<b>Primary control</b>	Plan badge, status label, disabled module controls

The dashboard provides the opening status view and reflects the current plan state. It serves as the normal starting point before operators move into daily modules.

### Recommended operating procedure

- Check the visible plan badge before opening restricted modules.
- Use the dashboard as the first stop when diagnosing why a feature is unavailable.
- When a module is locked, verify the active plan before requesting support.

#### Practice note

A locked control is usually a plan-access issue rather than an application fault.

## 3. Customer Master

<b>Module</b>	Customer Master
<b>Minimum access</b>	Starter and above
<b>Primary control</b>	Customer creation, editing, route-linked customer selection

Customer Master stores the customer records used during Create Order and when editing previously saved transactions. Clean customer records reduce manual corrections and support faster order preparation.

### Recommended operating procedure

- Create new customer records before preparing the first order for that account.
- Update address, route, and contact details immediately when they change.
- Use this module to correct customer data instead of retyping values repeatedly in transactions.

**Practice note**

Maintain one clean record per customer account to prevent duplicated history and reporting fragmentation.

## 4. Item Master

<b>Module</b>	Item Master
<b>Minimum access</b>	Starter and above
<b>Primary control</b>	Item creation, edits, barcode storage, optional server sync

Item Master maintains the core product list, including item identifier, item name, category, unit, price, and barcode. It is the reference source for transaction entry and related outputs.

### Recommended operating procedure

- Create item records before using them in transactions.
- Validate unit of measure and standard selling price before saving changes.
- Use category naming consistently to keep reports readable.
- Where server synchronization is enabled, confirm the sync message after bulk updates.

**Practice note**

Poor item naming and inconsistent units create downstream problems in printing, inventory review, and analysis.

## 5. Create Order

<b>Module</b>	Create Order
<b>Minimum access</b>	Starter and above
<b>Primary control</b>	Customer selection, route assignment, cashier fields, line items, save and print actions

Create Order is the main customer-facing transaction workspace. It is used to prepare, save, navigate, edit, copy, and print business documents tied to customer orders.

### Recommended operating procedure

- Select the correct customer and route before adding line items.
- Confirm item, quantity, and amount values carefully before saving.
- Use existing master data rather than manual free-text entry wherever possible.
- Review saved documents before printing delivery receipt, invoice, or official receipt output.

**Practice note**

This module is the main control point for document accuracy. Most downstream reporting and print output depend on clean entry here.

## 6. Supplier PO

<b>Module</b>	Supplier PO
<b>Minimum access</b>	Business and above
<b>Primary control</b>	Supplier order creation, review list, procurement context

Supplier PO supports supplier-side ordering and procurement workflows that are separate from customer transactions. It is intended for purchasing and receiving preparation.

### Recommended operating procedure

- Use Supplier PO for internal procurement rather than customer sales documents.
- Keep supplier-side records separated from customer-facing paperwork.
- Review supplier records before updating inventory-related views.

**Practice note**

Separating customer orders from supplier orders protects document clarity and improves audit trails.

## 7. Inventory

<b>Module</b>	Inventory
<b>Minimum access</b>	Business and above
<b>Primary control</b>	Inventory view, manual adjustment prompt, confirmation workflow

Inventory provides stock-related review and adjustment capability. It is used after transactions, supplier activity, and operational stock corrections.

### Recommended operating procedure

- Review on-hand figures after procurement or stock-moving transactions.
- Record adjustments only after validating the reason for the variance.
- Refresh inventory review after restore work or route switching.

**Practice note**

Use inventory adjustment as a controlled correction process, not as a substitute for accurate transaction entry.

## 8. Route Manager

<b>Module</b>	Route Manager
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<b>Minimum access</b>	Business and above
<b>Primary control</b>	Route creation, switching, active route handling, route list refresh

Route Manager organizes work by route and controls which route dataset is currently active. Route-based operation is useful when the business runs by territory, rider grouping, or delivery area.

### Recommended operating procedure

- Confirm the active route before entering or reviewing data.
- Create routes with clear naming standards and avoid near-duplicate names.
- Switch routes deliberately because route context affects visible records and reports.

**Practice note**

A route mistake can make good records appear missing when they actually belong to a different active route.

## 9. Reports

<b>Module</b>	Reports
<b>Minimum access</b>	Business and above
<b>Primary control</b>	Report generation and printable output

Reports provide printable or reviewable business summaries derived from stored transaction data. This module supports operational review and management oversight.

### Recommended operating procedure

- Run reports after validating that current route and date scope are correct.
- Use reports for operational review, release checks, and management follow-through.
- Keep master data clean so report outputs remain readable and consistent.

**Practice note**

Reports are only as accurate as the transaction and master data behind them.

## 10. Statistics

<b>Module</b>	Statistics
<b>Minimum access</b>	Business and above
<b>Primary control</b>	Period filters, route scope, dashboard-style summaries

Statistics turns saved activity into daily, monthly, yearly, or all-time analysis. It is intended for trend review and route-based performance checking.

### Recommended operating procedure

- Use daily mode for short operational review and reconciliation.
- Use monthly and yearly views for trend monitoring and management analysis.
- Check the selected route scope before interpreting totals.

**Practice note**

Statistics is best used after the transaction cycle is complete and route selection has been verified.

## 11. Backup Manager

<b>Module</b>	Backup Manager
<b>Minimum access</b>	Starter and above, except Demo
<b>Primary control</b>	Route backup, all-route backup, secure open, restore confirmation, progress logs

Backup Manager protects working data through secure export and controlled restore procedures. Backup files are encrypted and opened through an admin-password workflow.

*Default admin password: 1234. Use this credential for administrative access and protected backup actions unless it has been changed by the authorized administrator.*

### Recommended operating procedure

- Create a secure backup before imports, mass edits, restore work, or application updates.
- Use route backup for a single working route and all-route backup for a full operational snapshot.
- Require the correct admin password when creating or opening secure backup files. Default admin password: 1234 unless changed by the authorized administrator.
- After restore, review route, inventory, and supplier-side views before resuming normal work.

**Practice note**

Backup is a formal control process. Treat restore as a change event that should always be validated after completion.

## 12. Printing and document output

<b>Module</b>	Printing controls
<b>Minimum access</b>	Starter and above
<b>Primary control</b>	Document type, document numbering label, Classic and Formal templates

GMCore supports document-type selection and template selection for printed output. Available document types include Delivery Receipt, Invoice, and Official Receipt. Template style can be set to Classic or Formal.

### Recommended operating procedure

- Select the correct document type before printing.
- Use Formal template where a more structured external-facing output is required.
- Confirm document numbers after document-type conversion because PO numbers are transformed to output-specific formats.
- Use batch print only after verifying the correct records are selected.

#### Practice note

Printed output is often the final customer-facing record. Review before release.

## 13. Branding and Advanced Branding

<b>Module</b>	Branding
<b>Minimum access</b>	Business and above
<b>Primary control</b>	Branding form, logo upload, thermal QR image or generated QR, POS branding sync

Branding stores the business identity used across the application and compatible connected output. Available branding values include app name, company name, address, TIN, tagline, document title, logo, default branch and terminal names, receipt footer, paper size, and optional thermal QR settings.

### Recommended operating procedure

- Complete basic company identity fields before large-scale printing.
- Use a clean logo image and verify the preview after upload.
- Where thermal QR is used, set the label and source text carefully and review the preview before saving.
- After saving branding, verify sample printed output and any connected POS branding behavior.

#### Practice note

Branding is both a presentation control and an operational standardization tool. Keep it consistent across branches and terminals.

## 14. Receipt language and receipt label settings

<b>Module</b>	Receipt language and labels
<b>Minimum access</b>	All active plans

<b>Primary control</b>	Preset selection, custom label editing, reset to defaults
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GMCore supports receipt label presets and editable labels for multilingual or localized output. Presets include English, Spanish, French, and Custom. When a label is edited manually, the setting shifts to Custom.

**Recommended operating procedure**

- Use the preset language first, then customize only where a local wording standard is required.
- Review Date, Customer, Address, Item, Qty, Unit, Amount, Received By, and Total labels before approving output changes.
- Keep label wording short so printed layouts remain clean.

<b>Practice note</b>	Custom labels are useful, but over-customization can make standard operating documents harder to recognize across staff.
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**15. App language, currency, and locale**

<b>Module</b>	App locale and currency
<b>Minimum access</b>	All active plans
<b>Primary control</b>	Auto or manual mode, locale selection, currency selection, display formatting

The application can run in automatic or manual locale mode. Currency and locale settings affect display formatting and regional presentation. Automatic mode can infer region and currency from device language and timezone. These settings control display behavior, not historical price conversion.

**Recommended operating procedure**

- Use automatic mode for standard single-region devices.
- Use manual mode when a device must display currency or locale different from its default regional settings.
- Re-check printed and report formatting after changing locale or currency display settings.

<b>Practice note</b>	Currency display settings improve readability but do not convert historical stored transaction prices in the database.
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**16. License Management**

<b>Module</b>	License Management
<b>Minimum access</b>	Available in all states; full effect depends on plan status
<b>Primary control</b>	Activate key, refresh status, clear saved key, demo fallback handling

License Management activates, displays, refreshes, and clears the device license. The interface shows the masked saved key, current plan label, and expiry date where available.

### Recommended operating procedure

- Enter a valid GMCore license key and confirm the plan label after activation.
- Use Refresh when verifying that the device status is current.
- Use Clear License only when intentionally removing the saved device license.
- After clearing, confirm whether the device returns to Demo state before resuming use.

**Practice note**

In Demo state, license management remains available even when other admin controls are disabled.

## 17. App Update Manager

<b>Module</b>	App Update Manager
<b>Minimum access</b>	Administrative control
<b>Primary control</b>	Check for update, download update, install update, progress bar and status chip

App Update Manager checks the current version, latest available version, update status, progress, and installation readiness. Download and install actions are controlled from the admin area.

### Recommended operating procedure

- Check for updates during controlled maintenance windows.
- Download first, then confirm installation when ready for the application restart.
- Review update status and percent progress before assuming the package is ready to install.
- Perform secure backup before major update activity.

**Practice note**

Treat update installation as a scheduled maintenance event, not an ad-hoc action during active transaction periods.

## 18. Enterprise extensions

<b>Module</b>	Enterprise / Pro tools
<b>Minimum access</b>	Enterprise / Pro
<b>Primary control</b>	Agent menu, import and export helper actions, parse workflow, sync-enabled operations

Enterprise-level workflow extends GMCore with Agent tools, Parse PO, Website Sync, and Mobile Sync. These modules support connected or automation-heavy environments beyond core desktop operations.

### Recommended operating procedure

- Use Agent tools for controlled export and import support tasks.
- Use Parse PO only when the business has a defined controlled intake workflow for converted purchase data.
- Coordinate Website Sync and Mobile Sync with the store's broader operating procedure so data movement is predictable.

**Practice note**

Enterprise modules extend capability, but they should be introduced with clear process ownership and operator training.

## 19. Troubleshooting guide

Observed issue	Likely cause	Recommended action
A module button is disabled.	The active plan does not include the module, or the license is expired.	Verify the plan badge, refresh license status, then confirm the required plan level.
Backup cannot be created or opened.	Backup is not available in Demo state, or the admin-password workflow was not completed.	Confirm plan status and re-run the secure backup action with the correct admin password.
A record seems to be missing.	The device may be viewing the wrong active route.	Check Route Manager, switch to the correct route, then review the record list again.
Printed output wording looks wrong.	Receipt labels or document preferences were changed.	Review document type, template, receipt language, and custom label values in settings.
Branding does not match expected output.	Branding fields, logo, or thermal QR settings were changed or not rechecked.	Open Branding, verify all identity fields, preview assets, and test a sample print.
Update package will not install.	Download may be incomplete or the install step was started at the wrong time.	Check update status and progress, close active work, then install during a maintenance window.

## 20. Best-practice checklist

- Maintain customer and item masters before starting new transaction cycles.
- Check route context at the start of every work period.
- Review document type and template before printing customer-facing output.
- Perform secure backup before major edits, route restore, branding changes, or app update activity.
- Use license refresh as the first diagnostic step when access control looks incorrect.
- Keep branding, receipt labels, and locale settings standardized across operating devices.

**Final note**

A good GMCore environment is built on disciplined master data, route awareness, controlled printing, and routine backup. Consistency in these areas improves transaction accuracy, reporting quality, and operational reliability.

## Appendix A

# GMCore POS Client Setup, Payment, Printing, and Shift Operations

This appendix extends the GMCore Operations Manual with the standard operating guidance for the GMCore POS Client. It covers terminal settings, server connection, cashier login, barcode sales, payment validation, receipt printing, branding synchronization, and shift opening and closing procedures.

## A1. Operational overview

GMCore POS Client is designed as a cashier-facing companion terminal that connects to the GMCore server and supports day-to-day selling activity. The client handles cashier login, catalog loading, barcode processing, cart review, payment collection, receipt printing, branding sync, and end-of-shift cash reconciliation.

The default local server endpoint is **http://127.0.0.1:3002**. The saved address is normalized automatically before the terminal uses it for health checks, catalog loading, login, and sales posting.

## A2. Accessing POS settings

A floating **Server / POS Settings** control is intended for the login screen so that terminal setup is available before the cashier starts live selling. Keeping this control on the login view helps maintain a cleaner cashier workspace during active transactions.

Use the settings window whenever a terminal must be pointed to a different GMCore server, assigned to a different receipt printer, or configured for cash drawer behavior.

## A3. Server and hardware configuration

The settings window is used to maintain the **Server URL**, printer mode, receipt printer name, and cash drawer controls for the terminal. Printer mode may be set to **System** or **Network** depending on the deployment setup.

Where drawer support is enabled, the terminal can store the drawer driver, the drawer kick code, and optional network printer host and port values. The standard default kick code is **27,112,0,25,250**, and the standard network printer port is **9100**.

A connection test should be performed after changing the server address so that the terminal can confirm communication with the GMCore health endpoint before normal operation resumes.

## A4. Cashier login and starting work

Cashiers sign in through the POS login screen using their cashier ID and PIN. After login, the terminal requests the branch and terminal context, loads the product catalog, and checks whether an active shift already exists for the current terminal.

If an open shift already exists, the terminal resumes that shift and restores the cashier's working context. If no shift is active, the cashier proceeds to **Open Shift** and records the opening cash before entering sales

mode.

## A5. Product scanning and cart control

Sales mode is built around barcode-driven entry. The terminal can search by barcode, code, SKU, item ID, or product name, then add the matched product directly to the cart.

Cart controls support quantity increase and decrease, line removal, sale clearing, held-sale saving, and held-sale resumption. This lets the cashier manage interruptions without losing the current transaction.

Best practice is to keep the barcode input focused during normal sales work so that scanning remains fast and consistent.

## A6. Payment methods and proof validation

The POS Client supports **Cash**, **QR Ph**, **GCash**, **Maya**, **Card Terminal / Card**, and **Payment Link** transaction types.

Cash transactions require a sufficient tendered amount before the sale can be finalized. The system computes the change due automatically once the tendered amount equals or exceeds the total.

Non-cash transactions require reference control before saving. The cashier should capture the payment reference number and confirm that the payment has been verified. Depending on the method, the interface may also prompt for provider details, approval code, or note fields.

Recommended control discipline: do not finalize a non-cash sale until the reference number is complete and the confirmation checkbox has been reviewed.

## A7. Receipt printing and customer output

After a successful sale, the POS Client generates a printable receipt that includes business identity, branch and terminal name, receipt number, cashier name, payment method, item lines, subtotal, discount, grand total, tendered amount, and change due.

Receipt output supports both **58mm** and **80mm** thermal paper sizes. Branding values such as business name, logo, receipt footer, paper size, and optional thermal QR content are synchronized from GMCore branding controls.

Where supported hardware is configured, the client can send the receipt directly to the assigned printer through the terminal's silent print bridge.

## A8. Cash drawer behavior

If drawer automation is enabled, the terminal may trigger the cash drawer automatically after a successful cash sale. This behavior should be enabled only on terminals that are physically connected to a compatible printer or drawer interface.

Use controlled testing after setup changes to confirm that the drawer opens only under the intended conditions.

## A9. Shift opening and closing

Shift control is part of the standard cashier workflow. At opening, the cashier records the opening cash amount and starts the terminal shift. During the work period, the client tracks cash sales, non-cash sales, transaction count, and method-specific totals.

At closing, the cashier enters the actual cash on hand so the terminal can compare the expected cash against the counted amount and compute the variance. This provides a structured reconciliation step before the terminal returns to the login state.

A completed shift close should be reviewed carefully, especially where non-cash totals, payment-link transactions, or drawer-related cash handling need supervisory verification.

## A10. Branding and terminal defaults

The POS Client can synchronize branding values from GMCore, including the business name, logo, default branch name, default terminal name, receipt footer, paper size, and optional thermal QR settings.

After branding changes are saved in GMCore, operators should test a sample receipt to confirm that branding, layout, and QR output appear correctly on the target printer.

## A11. Recommended operating checklist

- Confirm the correct GMCore server and terminal settings before cashier login.
- Use the login screen settings control for setup work and keep the sales view dedicated to live transaction handling.
- Verify non-cash references before saving digital payments.
- Review sample receipt output after branding, printer, paper-size, or QR changes.
- Close each shift with controlled cash counting and variance review.