

MyInventra

Complete Business Operations Platform for Modern Enterprises

1.1. Introduction

MyInventra is a **complete business management system** designed for modern businesses. It helps manage inventory, sales, purchases, accounts, and employees all in one place. Suitable for shops, online stores, pharmacies, and factories, it works for both small and large businesses.

The system has an easy-to-use interface in Bangla and English, real-time business updates, and can be customized as your business grows. It helps you save time, reduce errors, and make better decisions.

This guide explains all features clearly for business owners, staff, and IT teams.

-MyPinacle Team

★ 1. Key Features

1.2. AI and Automation

Keeping in mind the increasing speed-run towards automation, MyInventra considers this a mandatory requirement to be featured in this app. Some of the finished sections of so many ongoing is mentioned below.

- **AI prediction**

- AI will predict product-wise forecast for your inventory using multiple models:
 - Linear Regression, Facebook prophet, Tensorflow, Exponential Smoothing, Arima, & Random Forrest
 - Predict upto 12 weeks of future sales
 - Upto 2 years of historical merge of forecast data
- System Analyzer Q&A AI Chat-Bot

- **Voice Command Navigation:**

- Voice command with built-in browser audio recognition:
 - Navigate through menu
 - Toggle listening statuses

- **Voice Command Make Sale:**

- Voice command for product search:
 - Product with code/ name
 - Extend search by products variants/ colors
 - Auto-detect search state, without any click from user
- Numeric input fields:
 - Auto-detect selected input field, receive voice command to assign value
 - Automatically convert to Numeric value

1.3. Export & Access Control

In-depth analysis and exportable data for all operations. The system ensures the product cost, profit and loss, and other sensitive information access to be hidden from unwanted users

- **Access Control:**

- Granular role-based permissions:
 - View lists of data
 - Add new data
 - Edit existing records
 - Delete entries
 - Action specific permissions

- Record scoping:
 - Standard users see only their entries
 - Admins view all records
 - Permissions for each individual modules and submodules
- Audit trail for all changes

- **Reporting & Export:**

- Professional PDF generation:
 - Filtered lists for all view pages
 - Print-ready formatting
 - Archival quality
- Excel export capabilities:
 - Full data export for data analysis
 - Financial reporting integration with/without image

1.4. Multi Branch Tracking

Keep all the scattered pieces of your business records together across branches

- **Branch-wise stock management:**

- Keep track of your transactions branch-wise
- Audit trail for all stock related changes per branch
- Branch-wise sales, purchase, adjustment, removal
- Transfer product stocks seamlessly through branches

- **Branch-wise accounts management:**

- Keep track of your money transactions branch-wise
- Audit trail for all accounts related changes per branch
- Branch-wise payment for sales, purchase, sales return, purchase return, expense

1.5. Bangladeshi Courier API

Order once, get it done everywhere

- **Order through myinventra:**

- Choose a courier, and upon updates in app, changes are made in relevant courier merchant account
- Track changes made from courier including payment, status, directly in app

- **Bangladesh couriers integrated:**

- Pathao



○ Steadfast

2. Modules & Features

Each module serves a distinct purpose and integrates seamlessly with the rest of the system.

2.1. Dashboard

Interactive command center providing real-time business intelligence and customizable performance monitoring.

- **Performance Metrics:**

- Key Financial Indicators:
 - Daily sales/purchases tracking
 - Outstanding receivables/payable
 - Real-time profit calculation
- Business Health Overview:
 - Total revenue/expense summaries
 - Customer/supplier/user counts

- **Data Visualization:**

- Trend Analysis:
 - Weekly sales/purchases charts
 - Comparative performance graphs
- Performance Leaders:
 - Top selling products (YTD)
 - Highest value customers (YTD)

- **Operational Alerts:**

- Inventory Management:
 - Low stock warnings
 - Replenishment alerts
- Activity Monitoring:
 - Recent sales/quotations
 - Latest purchases/returns

- **Personalization:**

- Customizable Interface:
 - Widget visibility controls
- User-Specific Layouts:
 - Role-based default views
 - Individual preference saving

- **Integration Features:**

- Real-time Data Syncing:
 - Automatic transaction updates
 - Instant inventory changes
- Cross-Module Insights

2.2. Products Management

Complete product lifecycle management system with advanced categorization, variant handling, and inventory control.

- **Product Catalog:**

- Advanced Product Creation:
 - Standard and variant products
 - Multi-category assignment
 - Module-wise Custom fields and specifications
- Pricing & Inventory:
 - Cost/price/minimum price
 - Initial stock entry for products to initiate inventory with existing business stock
- Media & Identification:
 - Multiple product images
 - Barcode/QR code generation, dynamic page size
 - Multiple product Graphics (For e-commerce)
 - Multiple product Videos (For e-commerce)
 - product Specifications (For e-commerce)

- **Organizational Structure:**

- Brand Management:
 - Central brand directory
 - Brand-specific product filtering
- Category System:
 - Multi-level categories
 - Category-wise discounts
 - Visual category organization

- **Measurement & Units:**

- Flexible Unit Definition:
 - Base and sub-units
 - Conversion rate configuration

- Transaction-Specific Units:
 - Sales unit assignment
 - Purchase unit assignment

- **Mixed Products:**

- Can create mixed products using base items:
 - Auto calculate cost, price, unit
 - Auto increment/decrement for output product and base items
 - Customizable additional cost (packaging, labour)
- Re-stock mixed items:
 - Quick re-stock, and auto calculate stock, costing and pricing
 - Auto unit assignment

- **Inventory Control:**

- Damaged Goods Tracking:
 - Automatic adjustment for damaged, stolen items
- Lost Goods Tracking:
 - Precise calculation of loss of shrinkable product units over-time.
- Stock Monitoring:
 - Low stock alerts
 - Warehouse-level quantities

- **Integration Features:**

- Cross-Module Synchronization:
 - Sales module integration
 - Purchase system linking
 - Quotation system linking
 - Adjustment system linking
 - Transfer system linking

- Barcode Scanning Support

- **Discount Management:**

- Apply product discount by multiple levels:
 - Product-wise discount
 - Category-wise discount
 - Customer-wise discount
 - Campaign-wise discount (E-commerce)

2.3. Purchase Management

Comprehensive procurement system for managing supplier purchases, returns, and inventory updates.

- **Purchase Creation:**
 - Create purchase and purchase orders for new and existing suppliers
 - Add products, specify quantities, and set purchase prices
 - Support for full, partial, and "pay later" payment options
 - Initiates purchase batch if product has expired date
- **Purchase Processing:**
 - View and filter purchases by status, date, or supplier
 - Edit or delete purchase orders (with appropriate permissions)
- **Purchase Returns:**
 - Process returns with full refunds or supplier credit notes
 - Track original purchase and reason for return
 - Automatic inventory adjustment for returned items
- **Payment Handling:**
 - Multiple payment methods (cash, bank transfer, mobile banking)
 - Support for advance payments and payment terms
 - Record payments against outstanding supplier balances
- **Inventory Integration:**
 - Automatic stock level updates upon purchase completion
 - Reverse stock adjustments for returns or cancelled purchases
- **Reporting:**
 - Bulk Processing:
 - Excel export
 - PDF generation
 - Purchase activity by supplier and product
 - Supplier performance and spend analysis
 - Payment outstanding and aging reports

2.4. Sales Management

Comprehensive tools to manage the entire sales lifecycle from creation to update, delete, returns, exchanges and reporting.

- **Sales Creation:**
 - Create sales for new and existing customers
 - Add products, apply discounts
 - Support for full, partial, and "pay later" payment options
 - Deduct stock from purchase batch if product has expiry
- **Sales Processing:**
 - View and filter sales by status, date, customer, or salesperson
 - Edit or delete sales
 - Print A4 size and POS invoice, print invoice in PNG, Print chalan, and delivery chalan
 - Make Due payment, Update shipping, and sale status
 - Send Email & SMS to related customer
- **Returns & Exchanges:**
 - Process full or partial returns with refunds or store credit
 - Handle product exchanges with automatic price difference calculation
 - Track original sale, reason for return and batch of product if expire date is enabled
- **Payment Handling:**
 - Multiple payment methods (cash, bank transfer, mobile banking)
 - Make advance payment, pay previous dues, handle customer balance dynamically
 - Record payments against outstanding balances
- **Shipping Management:**
 - Assign couriers and add tracking information
 - Apply and calculate shipping charges, Assign conditional amount for courier
 - Monitor shipment status
- **Quotation & Order Management from e-commerce (if any)**
 - Make/update and Send quotation To client & ability convert to Sale directly
 - Convert Order made from e-commerce to sale seamlessly with payment, additional discount, and courier tracking
- **Discounts:**
 - Product-wise, Category-wise, Customer-wise and Campaign-wise discounts automatically assigned for sale
 - Apply additional discount, or revoke automated discounts for specific sales requirement
- **Inventory Integration:**
 - Automatic stock level updates upon sale completion
 - Reverse stock adjustments for returns or cancelled sales

- **Sales Channel Integration:**

- Keep track of where the sales are made from
- Filter sales, and reports by sales channel to find insights about growth opportunity

- **Reporting:**

- Bulk Processing:
 - Excel export
 - PDF generation
- Sales performance by user, product, and customer
- Return and exchange analysis
- Payment collection reports

2.5. Payments Management

Complete financial transaction system for managing all payment flows including sales, purchases, and returns.

- **Supported payment methods:**

- • Cash
- • Bank Transfer
- • Mobile Banking

- **Sales Payments (Incoming):**

- Record full/partial payments against sales invoices
- Apply single payment to multiple outstanding invoices
- Automatic due amount calculation
- Email/SMS notifications to customers
- PDF receipt generation

- **Purchase Payments (Outgoing):**

- Record full/partial payments to suppliers
- Apply single payment to multiple purchase bills
- Supplier notifications via Email/SMS
- Payment receipt generation

- **Sales Returns Payments:**

- Manage customer refunds for returned products
- Multiple refund receipt methods
- Customer notification system
- Refund documentation with PDF receipts

- **Purchase Returns Payments:**

- Record supplier refunds for returned items
- Multiple refund receipt methods
- Supplier notification system
- Documentation with PDF receipts

- **Advanced Features:**

- Comprehensive filtering by date, reference, or contact
- Real-time payment status updates
- Integration with accounting records
- Audit trail for all financial transactions (Accounts History)

2.6. Courier Management

Complete solution for managing delivery services, payments, and financial tracking for courier partners.

- **Courier Services Management:**

- Add new couriers with complete details:
 - Contact information (phone, address, name)
 - Initial due amount
- Edit existing courier profiles
- Archive inactive courier services

- **Financial Tracking:**

- Comprehensive due amount management:
 - Initial due amounts
 - Conditional amounts from sales
- Detailed due breakdown per courier
- Sales-specific outstanding amounts payment

- **Payment Processing:**

- Record payments with multiple methods:
 - Cash payments
 - Bank transfers
 - Mobile banking
- Payment history with advanced filtering:
 - Date range selection
 - Courier-specific views

- Professional PDF receipt generation

- **Reporting & Analytics:**

- Comprehensive courier listings with filtering by:
 - Courier name
 - Outstanding due amounts
 - Activity status
- Performance analysis metrics
- Payment tracking and reconciliation
- Business insights for delivery operations

- **Integration Features:**

- Seamless connection with Sales module
- Automatic conditional amount calculation
- Real-time due amount updates

2.7. Accounts Management

Centralized financial hub for managing all monetary accounts, transactions, and financial reporting.

- **Account Administration:**

- Complete account lifecycle management:
 - New account creation with initial balance
 - Account information updates
 - Active/inactive status control
- Unified dashboard for all financial accounts:
 - Bank accounts
 - Mobile banking wallets
 - Cash holdings
- Detailed account analytics:
 - Real-time balance tracking
 - Deposit analysis (total vs net)
 - Expenditure tracking (total vs net)
- E-commerce payment account designation

- **Transaction Processing:**

- Comprehensive fund movement:
 - Inter-account transfers

- ○ Capital injections
- ○ Fund withdrawals
- Complete transaction history with:
 - ○ Timestamps
 - ○ Amount details
 - ○ Participating accounts

- **Financial Reporting:**

- Detailed account statements:
 - ○ Account-specific transaction histories
 - ○ Date range filtering
 - ○ Integrated sales/purchase/return data
- Daily financial snapshots:
 - ○ Daybook summaries
 - ○ Chronological transaction logs
- Corporate financial health:
 - ○ Balance sheet generation
 - ○ Automatic equity calculations
 - ○ Assets vs liabilities analysis

- **Audit & Compliance:**

- Comprehensive transaction logging:
 - ○ Full audit trails
 - ○ Reference tracking
 - ○ Responsible party recording
- Advanced search and filtering
- Export capabilities:
 - ○ PDF for documentation
 - ○ Excel for analysis

- **System Configuration:**

- Financial controls:
 - ○ Overdraft permissions
 - ○ Mobile banking cash-out charges
- Transaction rules and limits
- Account visibility settings



2.8. Stock Management

Complete inventory control system with real-time tracking, comprehensive reporting, and demand forecasting capabilities.

- **Inventory Reporting:**

- Complete stock overview with:
 - Current stock levels
 - Last purchase date/price
 - Product images and details
- Financial valuation reporting:
 - Total inventory cost
 - Potential sales value
- Advanced filtering:
 - Zero stock toggle
 - Global product search
- Export capabilities (PDF With Image/Excel)

- **Stock Movement Tracking:**

- Complete transaction history:
 - Date and reference tracking
 - Before/after stock levels
 - Transaction types (sales, purchases, returns)
- Full audit trail for compliance
- Advanced search by:
 - Product name
 - Reference number
 - Transaction type
- Export options (PDF/Excel)

- **Demand Forecasting:**

- E-commerce stock requests:
 - Customer notification system
 - Requested quantities tracking
- Restocking prioritization tools

- **Product-Level Analytics:**

- Detailed product dashboards:
 - Warehouse-level stock breakdown
 - Variant/color tracking
- Transaction history with tabbed views:
 - Sales
 - Purchases
 - Returns
 - Quotations
 - Adjustments
- Date range filtering for trend analysis
- Per-tab export options (PDF/Excel)

- **Integration Features:**

- Real-time synchronization with sales/purchases
- Automated low-stock alerts
- Barcode scanning compatibility

2.9. People Management

Centralized system for managing all business relationships including customers, suppliers, and internal users.

- **Customer Management:**

- Complete customer database with:
 - Contact information
 - Financial balances
 - Purchase history
 - Custom fields (e.g., pet names)
- Advanced customer organization:
 - Customer groups
 - Type classification
- Financial management:
 - Balance summaries
 - Due payment processing
- Data import/export (CSV, PDF, Excel)

- **Supplier Management:**

- Comprehensive supplier directory:

- Contact details
- Transaction history
- Financial status

- Financial tracking:

- Purchase dues
- Return balances
- Payment processing

- Bulk operations:

- CSV import
- PDF/Excel export

- Detailed supplier profiles

- **Investor Management:**

- Comprehensive Investor directory:

- Contact details
- Transaction history
- Financial status

- Finance Operations:

- Incoming transactions (Loan)
- Outgoing transactions (Replay Loan)
- Linked with system accounts and company liability

- Data management:

- CSV import
- PDF/Excel export

- **User Administration:**

- Complete user control:

- Account creation
- Profile management
- Password reset

- Advanced access control:

- Role-based permissions
- Warehouse assignment
- POS-specific access

- Activity monitoring:
 - Transaction reports
 - System usage tracking
- Account lifecycle management:
 - Activation/deactivation
 - Access auditing

- **Integration Features:**

- Seamless connection with:
 - Sales module
 - Purchase module
 - Inventory system
- Financial system synchronization
- Cross-module reporting

2.10. Reports

Comprehensive business intelligence suite providing actionable insights across all operational areas.

- **Financial Performance Reports:**

- Profit & Loss Statements:
 - Company-wide financial summaries
 - Gross/net profit calculations
- Detailed Profit Analysis:
 - Bill-level profitability
 - Customer contribution analysis

- **Sales Analytics:**

- Transaction Reporting:
 - Complete sales history
 - Payment status tracking
- Performance Metrics:
 - Product sales performance
 - Salesperson productivity

- **Purchase Analysis:**

- Procurement Reporting:
 - Complete purchase history
 - Supplier transaction details

- Spend Analysis:
 - Product purchase trends
 - Buyer activity metrics

- **Inventory Intelligence:**

- Stock Status Reports:
 - Current inventory valuation
 - Purchase price history
- Movement Tracking:
 - Complete audit trails
 - Product-level transaction history
- Warehouse Analytics:
 - Location-specific activity
 - Transfer tracking

- **Relationship Management:**

- Customer Insights:
 - Account activity summaries
 - Due balance reporting
 - Detailed transaction ledgers
- Supplier Analysis:
 - Purchase volume tracking
 - Outstanding balance reports
- User Activity:
 - Transaction processing metrics
 - System usage statistics

- **Financial Tracking:**

- Daily Financials:
 - Daybook summaries
 - Running balance tracking
- Account Management:
 - Complete transaction logs
 - Balance verification
- Corporate Health:
 - Balance sheet generation
 - Equity calculations

- Expense Analysis:
 - Categorized spending
 - Cost center tracking

- **Reporting Tools:**

- Advanced Filtering:
 - Custom date ranges
 - Multi-criteria searches
- Export Capabilities:
 - PDF generation
 - Excel export

- Cross-module Data Integration

2.11. Settings Management

Centralized configuration hub for customizing system behavior, appearance, and integrations to match business requirements.

- **System Configuration:**

- Company Profile:
 - Business name and contact details
 - Document branding (invoices, reports)
- Brand Customization:
 - Logo upload for system and Invoices/Receipts
- Ability Management:
 - System ability permissions (e.g., enable sound effects, expire dates)
- Currency and Localization:
 - Default customer
 - Default currency selection
 - Date/time format configuration
- Cache clearing functionality
- Dashboard layout settings

- **Financial Settings:**

- Transaction Rules:
 - Overdraft permissions
 - Negative stocks permissions
 - Mobile banking cash-out charges

- Default Values:
 - Pre-selected customer
- Tax Configuration:
 - Enable/Disable tax in system
 - Default tax rates
 - Tax calculation basis
- Controlling Configuration:
 - Sales update and quotation validity options
 - Courier, document download related settings

- **Invoice Customization:**

- Interface Settings:
 - Customer notes display
 - Previous dues visibility
 - Toggle specific fields to display on invoices
 - Customize invoice & printer size
- Transaction Defaults:
 - Quick product lookup settings

- **Access Control:**

- User Permissions:
 - User creation and management
 - Role creation and management
 - Granular module access control

2.12. E-commerce Management (Optional Module)

Complete online store solution with content management, promotional tools, and full customization capabilities.

- **Store Configuration:**

- Branding & Appearance:
 - Dual-theme logos (light/dark)
 - Custom loading animations
 - Homepage sliders (5 images)
 - Promotional banners (3 positions)
- Business Information:
 - SEO-optimized descriptions
 - Google Maps integration
 - Contact details display

- Operational Settings:
 - Custom store hours
 - Order quantity limits
 - Stock/price visibility toggles

- **Content Management:**

- Article System:
 - Rich text editor with media
 - Category organization
 - SEO meta controls
- Policy Management:
 - Product return policies
 - Privacy policy editor
 - Scrolling announcements
- Social Media Integration:
 - Platform-specific links
 - Social sharing options

- **Promotional Engine:**

- Campaign Creation:
 - Scheduled promotions
 - Custom cover images
 - Activation controls
- Discount Management:
 - Product-specific offers
 - Flexible discount types (%/fixed)
 - Bulk product assignment
- Campaign Analytics:
 - Performance tracking
 - Exportable reports (PDF/Excel)

2.13. Expense Management

Complete financial tracking system for all business expenditures with advanced categorization and reporting.

- **Expense Tracking:**

- Comprehensive expense listing with key details
- Create detailed expense records including:
 - Category classification

- ○ Payment method details (Cash, Mobile Banking, Bank Transfer)
 - ○ Specific account information
 - ○ Descriptive notes
- Full editing capabilities for existing expenses
- Batch deletion functionality
- **Advanced Filtering:**
 - Date range filtering (start/end dates)
 - Field-specific filters
 - Global search across all expense fields
- **Category Management:**
 - Create custom categories (e.g., Office, Marketing, Travel)
 - Full CRUD operations for categories

2.16. Point of Sale (POS) (Optional Module)

Streamlined checkout interface with advanced product handling and customer management features.

- **Product Handling:**
 - Barcode Scanning:
 - ○ Fast product lookup
 - ○ Hardware integration support
 - Intuitive Product Selection:
 - ○ Dynamic instant search by name/code
 - ○ Categorized image grid display
- **Transaction Processing:**
 - Flexible Cart Management:
 - ○ One-click product addition
 - ○ Real-time quantity adjustment
 - ○ On-the-fly price/discount changes
 - ○ Automatic tax calculation
 - Workflow Options:
 - ○ Transaction hold/resume
 - ○ Multi-terminal support
- **Customer Integration:**
 - Customer Management:
 - ○ Existing customer search/attach

- ◯ Quick-add new customer form

- **Inventory Synchronization:**

- Real-time Updates:
 - ◯ Instant stock level adjustments
 - ◯ Instant update for customer balance

- **Advanced Features:**

- Custom Receipt Templates
- Hold orders for sales process interruption
- Blocks sale under minimum price by unaware POS users

2.14. Human Resource Management (HRM)

Comprehensive personnel management system.

- **Employee Profiles:** Personal info, salary history, emergency contacts
- **Org Hierarchy:** Companies, departments, and job titles
- **Attendance System:** Manual, QR, or biometric integration
- **Leave Management:** Leave types, holidays, approval workflows
- **Payroll Processing:** Salary structures, payslips, deductions, bonuses

2.15.1 Doctor Management (Optional Module)

Specialized module for healthcare-oriented businesses.

- **Doctor Registry:** Store ids, specializations, and clinic details
- **Prescription Tracking**
- **Doctor Schedule Management**
- **Appointment Booking Management For Admin & Website Users**
- **Sales by Doctor:** Filter reports by prescribing doctor
- **Patient Tracking:** Track patient for future prescriptions

2.15.2 Appointment, Prescription & Clinic services (Optional Module)

Specialized module for healthcare-oriented businesses.

- **Create and maintain medicinal items:** Store products, types, and other details
- **Create and maintain Clinic Service:** Items that are considers as service
- **Client and patient management:** Enhanced SMS and mailing system to notify clinic clients
- **Create/edit/delete prescriptions:** Doctors with permitted login, can modify

- **Sale medicine items of prescriptions flawlessly:** Users with sales permission can convert prescription to a sale with one click
- **Appointment booking system:** Booking can be made from admin panel, and from website end, with all modification ability for admin side


3. Integrations

 SSLCommerz

 Bkash

 E-commerce

 Pathao

 Steadfast

4. User Benefits

Save Time & Reduce Errors

Automate manual tasks like stock counting and invoice creation, reducing human errors common in traditional ledger systems.

Better Business Decisions

See real-time reports to understand what products sell best, which customers buy most, and when to restock.

Prevent Fraud & Theft

Track every transaction and stock movement to reduce employee theft - a common challenge for Bangladeshi businesses.

Grow Without Limits

Start small and add features as your business grows - from small shop to multi-branch business.

Improve Cash Flow

Never forget customer dues or supplier payments with automatic reminders and tracking.

Mobile Friendly

Check your business from anywhere using mobile - perfect for Bangladeshi businessmen who are always on the go.







Tax Compliance

Generate proper invoices and reports needed for VAT and tax compliance in Bangladesh.

Reduce Costs

Minimize overstocking and dead stock - common problems for Bangladeshi retailers.

5. Coming Soon Features

-  AI Agent to discuss business growth
-  Automatic Purchase Suggestions
-  Year ending balance sheet
-  Digital Invoices with QR Codes
-  More Business Reports
-  Dedicated Mobile App

MyPinnacle

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