

CHEETAH SMART

ERP FOR SMALL & MEDIUM BUSINESSES

User Manual

Everything you need to run your business in Cheetah Smart — Sales, Production, Stock, Purchasing, Invoicing, Finance, and more, section by section.

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Covers every menu in the app, illustrated with real screens from a live company.

This manual walks through Cheetah Smart one section at a time. Each chapter explains what the screen is for, how its columns, buttons, and filters behave, and gives short numbered steps for the things you'll do most often. Read it start to finish when you're new, or jump around using the bookmarks panel in your PDF viewer once you know your way around.

Who it is for. For a small company, Cheetah Smart is the way out of spreadsheets: easy to implement, easy to maintain and use, and priced to save money. For a large company, it is a fast, easy layer for micro-controlling production — scheduling, materials, purchasing and shop-floor detail — beside the main system, so that system can stay clean. Underneath both is a complete ERP, so nobody outgrows it.

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CHAPTER 1

Getting Started

Cheetah Smart runs entirely in your browser at your company's ERP address (for example **erp.cheetah-smart.com**) — there's nothing to install. This chapter covers plans and the free trial, signing in, the demo and the guided tour, how the screen is laid out, how tables and popups behave everywhere in the app, and how to read the Dashboard, which is the home screen every time you log in.

Who Cheetah Smart is for

Small companies leaving spreadsheets. Start a trial, load your lists from CSV in the Data Manager (Chapter 11), and run real orders the same week. There is no administrator to hire and no IT project: if your team can use email, they can run it. Flat plans include every feature, so software cost stays predictable while fewer stock-outs, late jobs and re-typed orders save real money. Chapter 11 also explains how to move your existing spreadsheets in.

Large companies adding a production layer. If your main system is the system of record, Cheetah Smart can sit beside it as the fast layer where production is planned and tracked in detail: every job, material, purchase order and late-supplier warning (Chapter 6). Data moves by CSV import and export (17 record types, Chapter 11) and the built-in integrations (Chapter 7), so the main system keeps only what it needs and stays clean. This is not a replacement project; it is a layer on top.

Plans and the 14-day trial

Every Cheetah Smart plan includes the full product — the only difference is team size. **Starter** is \$149/month for 5 users, **Professional** is \$199/month for 10 users, **Business** is \$249/month for 25 users, and **Enterprise** is \$499/month for 50 users. You can change plans at any time from **Settings** → **Billing** as your team grows or shrinks.

Every new company starts with a 14-day free trial. Nothing is charged while the trial runs: your card is saved securely, and billing for the plan you picked begins on day 15 unless you cancel first from Settings → Billing.

- 1 On your ERP sign-in page, choose the **Start 14-day trial** tab.
- 2 **Step 1 — Plan:** pick the plan that fits your team size.
- 3 **Step 2 — Company:** enter your company's details and the login you'll use, and agree to the Terms of Service and Privacy Policy.
- 4 **Step 3 — Payment:** add a card. It is not charged until day 15.
- 5 You'll see a confirmation that your workspace is ready, with a link straight to your Dashboard. A welcome email also arrives with your login details and a link to this manual.

Signing in

- 1 Go to your ERP sign-in page and make sure the **Sign in** tab is selected (not “Start 14-day trial”).
- 2 Enter your username and password. The eye icon in the password box shows or hides what you typed.
- 3 Click **Sign in**. While it works the button shows a signing-in state, and if something is wrong a clear message appears above the form. You'll land on the Dashboard.

Sessions

Each license can be active on one device at a time. Signing in on a new device signs that same license out elsewhere, so you always know who is actually in the system (see Settings → Team & Licenses, Chapter 12).

Trying it first: See Our Demo

Not ready to sign up? The **See Our Demo** link on cheetah-smart.com opens a live, **read-only** copy of a working company — a small ice-cream manufacturer. There is no signup and no card, and nothing you do is saved, so you can click through every menu freely.

The guided tour

The first time a brand-new login signs in, Cheetah Smart offers a short optional “follow me” walkthrough that points out the main menu and the most useful buttons. It appears once per login. If you want to see it again, email info@cheetah-smart.com.

The navigation bar

Every page shares the same top bar. The dark strip at the very top shows your company name and a **Log out** button. Below it are your company logo and name, a row of small icons — the **gear** opens Settings (Chapter 12), the **question mark** opens the Cheetah Smart support assistant (Chapter 15), plus search and refresh — the local time, and the **EN / ES** switch that flips the whole app between English and Spanish.

Underneath is the main menu: **Dashboard, Sales, Production, Stock, Purchasing, Customers, Invoice & Shipping, Operations, Tasks, and Data Manager**. A **Shopify** menu also appears once a Shopify store is connected (Chapter 7). Most menus open a row of sub-tabs — for example Production has Manufacturing, Production Runs, and BOM Builder.

How every table works

Every table in Cheetah Smart follows the same rules, so once you've learned one you know them all.

- 1 **Newest first.** Tables open sorted newest to oldest, so the record you just created is on top.
- 2 **Sort.** Click a column heading (or its small arrows) to sort by that column; click again to reverse.
- 3 **Filter.** The boxes under the column headings filter that column as you type, and the search box above the table searches across the whole row. Combine them to narrow a long list quickly.

- 4 **Select.** The checkbox column on the left selects rows for bulk actions such as Cancel, Create Invoice, Mark Inactive, or Print. The checkbox in the header selects every visible row.
- 5 **Show...? toggles.** Checkboxes such as **Show Shipped?**, **Show Received?**, or **Show Completed?** bring back records that are hidden by default so the table normally shows only what still needs attention.

Fresh start

When you leave a menu or sub-tab and come back, every table returns to its default view: newest first, no column sort, and nothing checked. That prevents a forgotten sort from hiding records, or a leftover selection from letting a bulk action touch rows you didn't mean to pick. Text you typed in a search box and your Show...? toggles are kept.

Saving your work in a popup

Every entry popup — orders, customers, vendors, components, and everything else — ends with the same controls. **Save and Stay** saves without closing the popup so you can keep working; **Save and Exit** saves and closes it; and the **X** in the top-right corner closes without saving. The X stays visible even when a long popup scrolls.

Pickers list A to Z

Wherever you pick a customer, product, part, service, vendor, or material, the list is alphabetical (A to Z), which makes it easy to find a name you only half remember. Start typing in the picker's search box and the list narrows to matches. Records marked Inactive do not appear in pickers.

Making records inactive, and deleting

When a customer, vendor, raw material, purchase order, invoice, or quote is no longer in use, don't delete it — mark it **Inactive**. Use the **Make Inactive** button in the record's popup, or check several rows and use **Mark Inactive** in the toolbar. An inactive record is kept for your history but is left out of pickers and out of Dashboard totals. The **Show Inactive?** checkbox above each of these tables is on by default so you can still see them; untick it to hide them.

Delete Permanently is separate and deliberate. It only applies to records that are already Inactive, it can't be undone, and you must type **DELETE** to confirm. Records with recorded payments or received quantities are protected, because they are real financial history.

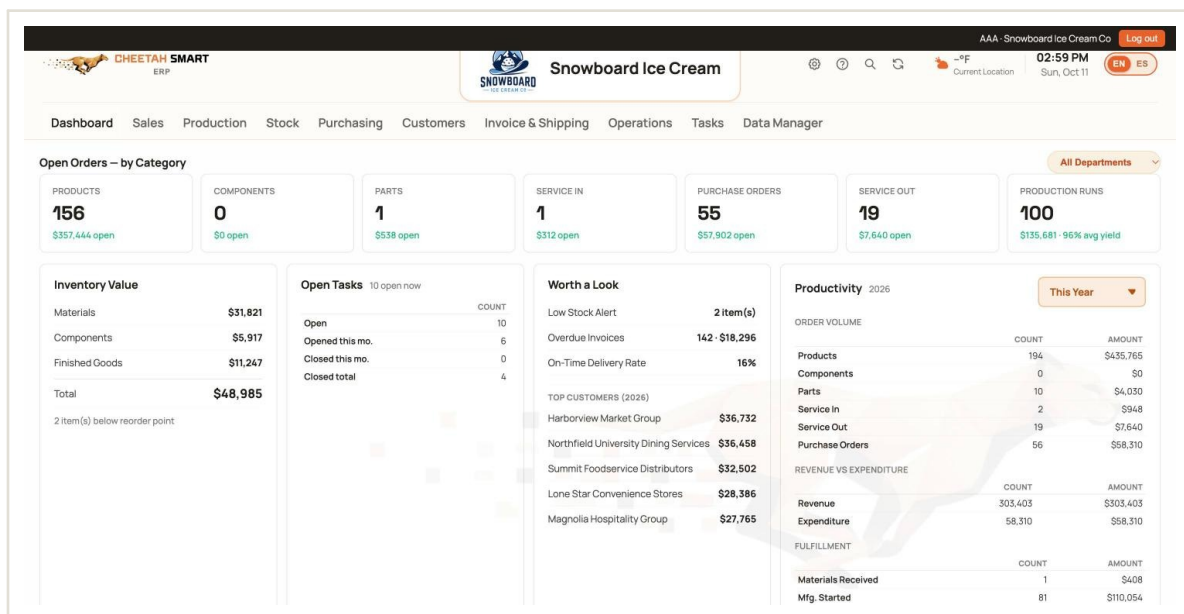
Reading the Dashboard

The Dashboard is a business overview, laid out in rows so you can see every part of the company at a glance.

- 1 **Per-area cards.** Each area has its own KPI card showing how many records are open and their dollar value: Products, Components, Parts, Service In, Purchase Orders, Service Out, and Production Runs.

- 2 **Inventory Value** breaks out into four lines — Raw Materials, Components, Finished Goods, and the Total.
- 3 **Open Tasks** shows how many tasks are still open (Chapter 10).
- 4 **Worth a Look** flags what needs attention now: low stock, overdue invoices, your on-time delivery rate, and your top customers.
- 5 **Productivity** summarizes order volume and revenue against spending for a period you choose from the dropdown: Year to Date, This Year, Last Year, or a Custom Range.
- 6 **Fulfillment** shows Manufacturing Started, Orders Finished, and Materials Received.
- 7 The **department dropdown** reshapes the page for the person looking at it: All Departments, Sales Focus, Purchasing Focus, Production Focus, or Finance Focus.

The Dashboard is a starting point, not a full report: click into Sales, Production, or Operations for the complete picture behind any number.



The Dashboard — per-area KPI cards, Inventory Value, Open Tasks, and Worth a Look.

CHAPTER 2

Sales

The Sales menu is where orders and quotes start their life. It has three sub-tabs: **Products & Components** (orders for your finished products and components), **Parts and Services** (spare-parts and service-only sales that don't need manufacturing), and **Quotes** (proposals not yet won).

Creating a Sales Order

- 1 Go to **Sales** → **Products & Components** and click **+ New Order**.
- 2 Pick the customer in the search-and-select picker (customers list A to Z; type to narrow). Once chosen, the customer's name fills the search box and their **Bill-To** and **Ship-To** addresses appear on the right so you can confirm them.
- 3 Add one or more line items — a mix of finished products, parts, and services is allowed on the same order. Set the item type, the item, and the quantity. Unit prices come from the pricing rules in Chapter 14, including this customer's Price List.
- 4 Set the delivery freight terms and shipping detail, add **Notes** and **Internal Notes** if needed (see below), and save.
- 5 If a manufactured line doesn't have enough finished stock, Cheetah Smart automatically raises a Manufacturing Order for the shortfall — you don't create that by hand.

If sales tax is turned on for your company, it shows as its own line on orders, quotes, and invoices. Which customer types are charged tax — Resale, Out of State, Retail/Final, or Export — is set in Settings → Company & Tax (Chapter 12).

Stock or produce?

When an order needs a product you may already have on the shelf, you decide how to cover it: take it from finished-goods stock, or manufacture it. Orders that need production raise a Manufacturing Order (Chapter 4), and on that order the **Use Stock** button fulfils it from what is already on hand and shows how many units that is. Nothing is built unnecessarily.

Following an order through to delivery

The order table shows each order's stock and delivery status. Use **Show Shipped?** to bring already-shipped orders back into view; it is off by default so the table shows only what is still open. When goods are delivered, click **Mark Delivered** on the order. Cheetah Smart asks you to confirm first, because this deducts the items from stock and completes the order; choose Cancel to leave everything as it was. Invoicing and shipping paperwork continue in Chapter 8.

Notes, Internal Notes, and the Packing Slip

Every Sales Order has two separate free-text fields. **Notes** print on the order's customer-facing documents. **Internal Notes** never print and are seen only inside Cheetah Smart — use them for anything staff-only, like a handling reminder or a credit-hold flag. **Print Documents** on any Sales Order can produce the order itself and a **Packing Slip**, a shipment-ready list of line items and quantities with no pricing.

Quotes

A quote is a proposal that hasn't been won yet, and it works like a Sales Order: customer, line items, pricing, delivery, and freight. You can fully edit a quote after creating it. Open quotes show by default; check **Show Approved/Cancelled** to bring quotes that have already been decided back into view. A quote prints as its own document and can be emailed straight from the row (Chapter 13).

Parts and Services

Parts and Services is for sales that skip production entirely — spare parts shipped from stock or billable service work. It has the same freight and shipping options as Sales Orders, including drop-ship, and an ETD (estimated delivery) column. Parts and Services sales show a shipping status rather than a Mark Delivered button.

Cancelling

Cancelling a Sales Order or a Parts and Services sale is a bulk action: tick one or more rows with the checkboxes and use **Cancel** in the toolbar above the table.

	CREATED ON	ORDER #	CUSTOMER	AMOUNT	ETD	SALES ITEMS	INGREDIENTS	PRODUCTION	DELIVERY	SENT
☐	2027-09-10	SO-27-313	Lone Star Convenience Stores	\$2320.91	10/01/27	Not available	Processed	+ Produce -61 in stock	Not shipped	View Details Edit Not sent
☐	2027-09-13	SO-27-314	FreshCart Online Grocery	\$1745.72	10/01/27	Not available	Processed	+ Produce -51 in stock	Not shipped	View Details Edit Not sent
☐	2027-09-15	SO-27-316	Island Provisions Ltd	\$1140.96	09/30/27	In stock	Not applicable	Take from Stock +31 in stock	Mark Delivered	View Details Edit Not sent
☐	2027-09-10	SO-27-312	Skyline Airline Catering	\$2889.41	09/29/27	Not available	Processed	+ Produce -21 in stock	Not shipped	View Details Edit Not sent
☐	2027-09-08	SO-27-310	Pine & Prairie Natural Foods	\$3108.84	09/28/27	Not available	Processed	+ Produce -104 in stock	Not shipped	View Details Edit Not sent
☐	2027-09-14	SO-27-315	Copper Kettle Coffee Roasters	\$1681.68	09/24/27	In stock	Not applicable	Take from Stock +19 in stock	Mark Delivered	View Details Edit Not sent
☐	2027-09-10	SO-27-311	Northfield University Dining Services	\$3684.60	09/23/27	Not available	Not available	+ Produce -41 in stock	Not shipped	View Details Edit Not sent
☐	2027-09-02	SO-27-309	Coastal Cruise Provisioning	\$1607.76	09/22/27	Not available	Not available	+ Produce	Not shipped	View Details Edit Not sent

Sales → Products & Components — sortable, filterable, with bulk actions above the table.

CHAPTER 3

Customers

Customers → Customer Master is your address book of who you sell to, together with the commercial terms each customer gets. Everything that needs a customer — Sales Orders, Quotes, Parts and Services, and Invoices — picks from this list.

Adding or editing a customer

- 1 Click **+ New Customer**, or **Edit** on an existing row.
- 2 Fill in the primary contact plus up to two additional contacts, then the separate **Bill-To** and **Ship-To** addresses. These addresses print in full on every document for this customer.
- 3 Choose the customer's **type** (for example Resale, Out of State, or Retail/Final) and their **payment terms**. The customer type decides whether sales tax is charged (Chapter 12); payment terms decide when an invoice is due. You can add your own terms from the terms list.
- 4 Set the status to **Active** or **Inactive**, then save with Save and Stay or Save and Exit.

View Details on a row opens a read-only summary of the customer, including both addresses. To stop using a customer without losing history, use **Make Inactive** (Chapter 1).

Customer Price Lists

Click **Price List** on any customer row to set special pricing for that one customer: a flat **regular price** for specific items, a **volume price** that applies once the order quantity reaches a minimum, or both. Whenever that customer is picked on a new Sales Order, Cheetah Smart checks their Price List first and falls back to your standard price when there is no entry. Chapter 14 explains the full order of precedence. A customer's price list can also be printed or emailed to them.

Emailing a customer directly

Every customer row has a **Send Email** button that opens a pre-filled email to that customer's address — handy for a quick note without leaving the ERP. Chapter 13 explains how document emails work throughout the app.

AAA - Snowboard Ice Cream Co

Log out

03:00 PM

Sun, Oct 11

EN ES

Dashboard Sales Production Stock Purchasing **Customers** Invoice & Shipping Operations Tasks Data Manager

Customer Master

+ New Customer

☒ Show Inactive?

☐	ID %	NAME %	CONTACT %	EMAIL %	PHONE %	TERMS %	TYPE %	STATUS %	
	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	
☐	CUST-025	QA Test Creamery LLC	Quinn Tester	denis.rojas@gmail.com	512-555-0199	Net 30	Retail/Final	active	View Details Edit
☐	CUST-024	Lone Star Convenience Stores	Rick Delgado	rick@lonestarcconvenienc.example	274-555-0840	Net 30	Resale	active	View Details Edit
☐	CUST-023	Golden Gate Gourmet Markets	Sasha Lim	sasha@goldengategourmetm.example	646-555-0522	Net 30	Resale	active	View Details Edit
☐	CUST-022	FreshCart Online Grocery	Owen Blackwell	owen@freshcartonlinegro.example	391-555-0507	Net 30	Resale	active	View Details Edit
☐	CUST-021	Metro Event Catering Co.	Yolanda Price	yolanda@metroeventcatering.example	382-555-0964	Net 30	Retail/Final	active	View Details Edit
☐	CUST-020	Heritage Farm Stands	Amos Keller	amos@heritagefarmstands.example	756-555-0382	Due on Receipt	Retail/Final	active	View Details Edit
☐	CUST-019	Island Provisions Ltd	Chantel Rolle	chantel@islandprovisionslt.example	474-555-0518	Net 30	Export	active	View Details Edit
☐	CUST-018	Northern Lights Frozen Imports	Liam Pelletier	liam@northernlightsfroz.example	305-555-0258	Net 45	Export	active	View Details Edit
☐	CUST-017	Frosty's Ice Cream Parlors	Gina Morales	gina@frostysicecreampar.example	742-555-0897	Net 30	Retail/Final	active	View Details Edit
☐	CUST-016	Evergreen School District Nutrition	Frank Delaney	frank@evergreenschooldis.example	588-555-0314	Net 60	Retail/Final	active	View Details Edit

Customer Master — contact info, terms, type, and status at a glance.

CHAPTER 4

Production

Production has three sub-tabs: **Manufacturing** (Manufacturing Orders, usually created for you by a sale), **Production Runs** (build-to-stock runs with no linked sale), and **BOM Builder** (define what a Component or a Final Product is made of).

Manufacturing Orders

A Manufacturing Order (MO) is a job to build a quantity of a product. MOs are created automatically from Sales Orders when something needs to be built, and each one shows the sale it came from, the product and quantity, any Purchase Order raised for a material shortfall, its status, and an estimated completion date.

Three checkboxes above the table control what you see: **Show Started?**, **Show Completed?**, and **Show Cancelled?**. Beside them, the **List / Board** switch changes the layout: List is the sortable table, and Board lays the same orders out as cards in columns — Not Started, In Progress, Completed (and Cancelled when shown). The buttons on a card do exactly what they do in the table, and you can also drag a card to another column as a shortcut for the same actions.

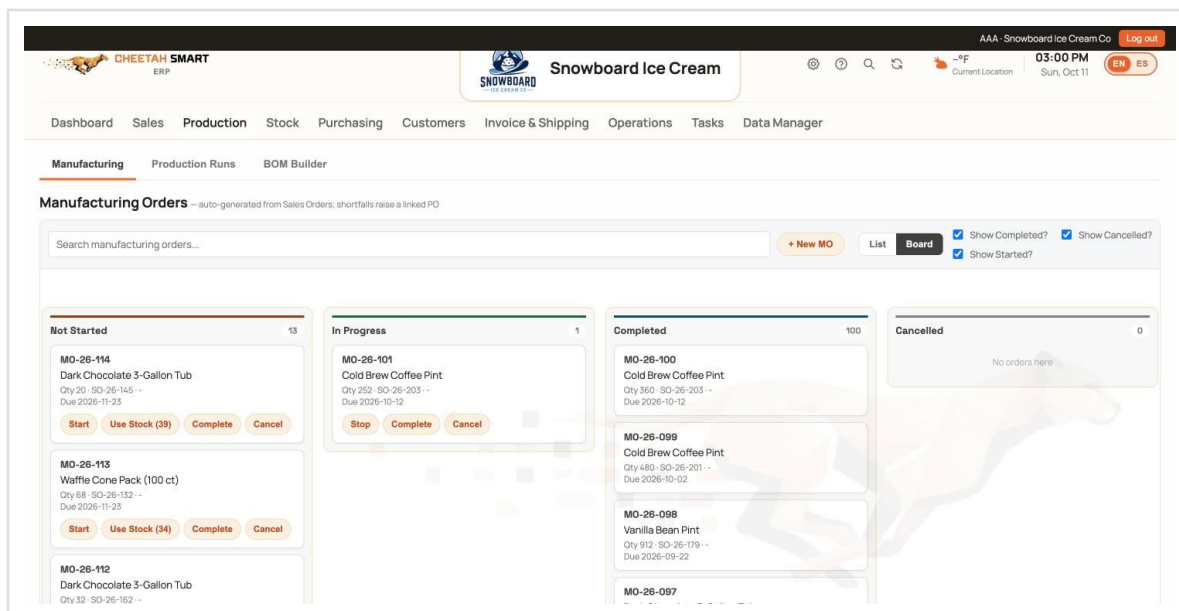
MO NUMBER	FROM SALE	PRODUCT	QTY	LINKED PO	STATUS	EST. COMPLETION	
MO-26-114	SO-26-145	Dark Chocolate 3-Gallon Tub	20	-	pending	2026-11-23	Start Use Stock (39) Complete Cancel
MO-26-113	SO-26-132	Waffle Cone Pack (100 ct)	68	-	pending	2026-11-23	Start Use Stock (34) Complete Cancel
MO-26-112	SO-26-162	Dark Chocolate 3-Gallon Tub	32	-	pending	2026-11-19	Start Use Stock (39) Complete Cancel
MO-26-111	SO-26-185	Vanilla Bean 3-Gallon Tub	36	-	pending	2026-11-03	Start Use Stock (47) Complete Cancel
MO-26-110	SO-26-168	Cookie Dough Pint	480	-	pending	2026-10-30	Start Use Stock (477) Complete Cancel
MO-26-109	SO-26-214	Chocolate-Dipped Vanilla Bar (Box of 24)	54	-	pending	2026-10-28	Start Use Stock (49) Complete Cancel
MO-26-108	SO-26-156	Gift Assortment (4 Pints)	78	-	pending	2026-10-28	Start Use Stock (9) Complete Cancel
MO-26-107	SO-26-172	Waffle Cone Pack (100 ct)	52	-	pending	2026-10-26	Start Use Stock (34) Complete Cancel

Production → Manufacturing — List view, with Start, Use Stock, Complete, and Cancel on each row.

Working an order

- 1 Find the order (use the search box or the column filters if the list is long).
- 2 On a not-yet-started order, **Use Stock (n)** fulfils it from finished goods already on the shelf instead of building; the number in brackets is how many units are available. If stock covers only part of the order, Cheetah Smart uses what it has and leaves the remainder to be manufactured. The button only appears when there is stock to use.

- 3 Click **Start** when work begins (the button becomes **Stop** while the order is running).
- 4 Click **Complete** when the build is finished. The built quantity moves into finished-goods stock. (If your company uses serial numbers, each Manufacturing Order is given its serial number when it is created — set this up in Settings → Production Areas.)
- 5 **Cancel** abandons an order you no longer need.
- 6 Use **Print Documents** to produce a Picking List, Stickers, and/or Packing List for the order — tick the ones you need and click Print.



The Board view — the same Manufacturing Orders arranged for scheduling.

Standalone builds

Need to build without a customer order behind it? Click **+ New MO**; the popup shows how much of the product you already have in stock. Or use Production Runs below.

Production Runs

A Production Run builds product for stock, or builds the intermediary components you'll need later, without a specific order. Click **+ Log Production Run** to record one. The table shows each run's date, product, **Planned** and **Produced** quantities, **Defective** units, **Yield** percentage, **Labor hours**, **Cost per unit**, and status. **Show Completed?** brings finished runs into view, runs can be marked complete from the table, and **Print Documents** works exactly as on a Manufacturing Order.

BOM Builder: defining what something is made of

A BOM (Bill of Materials) is the recipe for a Component or a Final Product: which raw materials and components go into it, and how much of each. **Components** are intermediate blends or sub-assemblies that other products use; **Final Products** are what you sell.

- 1 Go to **Production** → **BOM Builder** and choose **Create New BOM** (or **Edit Existing BOM** to change one that exists; use its Products/Components toggle and search to find it).
- 2 Choose whether you're building a **Final Product** or a **Component**, and type the name. The SKU is generated for you if you leave it blank (Final Products get an FP-YY-number SKU).
- 3 Set **Formulation Makes**: the batch **Yield Quantity** and **Unit** the recipe produces (for example 1 formula makes 50 Gallons). Cheetah Smart divides your ingredient cost across the real output of the batch, so cost per unit reflects your true yield. It is required before a formula can be saved.
- 4 Search and add raw materials from the left picker and components from the right picker into the **Basket** in the middle. Adjust each line's quantity right in the basket, which shows the unit of measure, and use the up/down arrows to reorder lines.
- 5 Watch the highlighted bottom line: it shows the **Total Cost** per unit next to the **Selling Price Base** (Final Products) or **List Price** (Components, from a cost multiplier), so you see your margin the moment you change a formula or a yield.
- 6 Save with **Save and Stay** or **Save and Exit**; a brief “Saved” confirmation appears.

BOM Builder — choose Final Product or Component, set what the formula makes, then fill the basket.

SELECTIONS: one formula, many sellable versions

When one formula should produce several sellable versions — sizes, flavors, colors — use **SELECTIONS**. Define a named option (such as Size) and its values (Pint, Quart, Gallon) and Cheetah Smart generates a distinct SKU for every combination. **Save Selection** stores a combination of option values under a name, and **Load Selection** brings it back onto a formula you are building or editing, so you don't retype it.

Make a Copy

In both Create New and Edit mode, **Make a Copy** sits at the bottom, to the left of Save and Stay. It first saves the BOM on screen (with the same checks as Save and Stay — if something is missing, nothing is copied), then creates a duplicate under a new SKU with a name ending in **COPY1**. Copy it again and you get COPY2, then COPY3. The copy carries the ingredient lines and quantities, yield, price or multiplier, category, lead time, and your SELECTIONS. It does not carry stock on hand, min/max levels, or Shopify listing details.

CHAPTER 5

Stock

Stock has three sub-tabs covering every level of inventory: **Finished Goods** (what you sell), **Components** (sub-assemblies used inside products), and **Materials** (raw materials bought from vendors).

Finished Goods

Finished Goods lists each product with its SKU, name, **On Hand** quantity, **Cost**, and **Selling Price**. Two buttons on each row jump straight to action: **Sales** starts a new order for that product, and **Quote** starts a quote — the number in brackets is how many open quotes already include it. Stock rises when a Manufacturing Order or Production Run is completed, and falls when an order is delivered.

	SKU	NAME	ON HAND	COST	SELLING PRICE	
☐	Filter...	Filter...	Filter...	Filter...	Filter...	
☐	SC-GIFT-016	Gift Assortment (4 Pints)	9	\$8.336	\$28.30	Sales Quote
☐	SC-CONE-015	Waffle Cone Pack (100 ct)	34	\$11.20	\$33.49	Sales Quote (5)
☐	SC-BAR-014	Chocolate-Dipped Vanilla Bar (Box of 24)	49	\$19.416	\$39.85	Sales Quote (1)
☐	SC-TUBSTRAW-013	Strawberry Swirl 3-Gallon Tub	15	\$32.528	\$66.99	Sales Quote
☐	SC-TUBCHOC-012	Dark Chocolate 3-Gallon Tub	39	\$29.152	\$65.84	Sales Quote (8)
☐	SC-TUBVAN-011	Vanilla Bean 3-Gallon Tub	47	\$29.60	\$60.06	Sales Quote (7)
☐	SC-CHOCQT-010	Dark Chocolate Quart	228	\$2.896	\$10.91	Sales Quote (2)
☐	SC-VANQT-009	Vanilla Bean Quart	320	\$2.864	\$10.34	Sales Quote
☐	SC-SFVAN-008	Sugar-Free Vanilla Pint	251	\$1.784	\$7.45	Sales Quote

Stock → Finished Goods — on-hand, cost, and selling price, with Sales and Quote shortcuts.

Components and Materials

Components and Materials follow the same pattern with more columns: on-hand quantity, how much is **Needed (Production)** by open orders and formulations, quantity **Expected (Incoming)** on open Purchase Orders, the reorder point, and the minimum order quantity (MOQ). A colored dot beside each Materials row shows at a glance whether it's normal, below its MOQ, or below what production currently needs.

- 1 Open **Stock** → **Materials** (or Components) and use the search box or column filters to find an item.
- 2 Compare **On Hand** plus **Expected (Incoming)** against **Needed (Production)** to see whether you're covered.

- 3** If not, enter a quantity and create a Purchase Order right from the row. Chapter 6 explains how Purchase Orders and Reorder Suggestions work.

Your own storage locations (for example a General Warehouse or a cold room) can be set in Settings → Production Areas and assigned to materials and components, so you can see where each item is physically kept.

CHAPTER 6

Purchasing

Purchasing covers everything you buy from outside, across five sub-tabs: **Purchase Orders**, **Reorder Suggestions**, **Service Orders**, **Vendors**, and **Components / Materials**.

Purchase Orders

The Purchase Orders table lists each PO with its supplier, item, quantity, cost, lead time, status, and a **Sent** column that turns to a green check with the date once the PO has been emailed to the vendor. **Show Received?** brings fully received POs back into view, and **Show Inactive?** controls inactive ones (Chapter 1).

- 1 Click **+ New PO** and choose the vendor. The Ship-To defaults to your own warehouse.
- 2 Pick the item and quantity. A live preview shows **Unit cost × quantity = Total**, and the PO total updates as you type. Lead time is taken from the material.
- 3 Record the **order date**, then add **Notes** for anything the vendor must know, and **Internal Notes** for anything staff-only. Notes print on the PO and go in the vendor email; Internal Notes never leave your company.
- 4 Save, then use **Send Email** to send the PO document to the vendor (Chapter 13).

PO NUMBER	SUPPLIER	ITEM	QTY	COST	LEAD TIME	STATUS	ACTIONS	SENT
PO-26-252	Verde Sweeteners	Stevia Sweetener Blend	25	\$520.00	26 days	cancelled	View Details	✓ Sent! 10/11/26
PO-26-251	Verde Sweeteners	Clover Honey	60	\$340.80	45 days	cancelled	View Details	Not sent
PO-26-250	Gulf Coast Sugar Supply	Corn Syrup	600	\$888.00	52 days	cancelled	View Details	Not sent
PO-26-249	Gulf Coast Sugar Supply	Brown Sugar	200	\$224.00	41 days	cancelled	View Details	Not sent
PO-26-248	Gulf Coast Sugar Supply	Cane Sugar	1500	\$1,620.00	25 days	cancelled	View Details	Not sent
PO-26-247	Prairie Valley Dairy Co-op	Skim Milk Powder	18	\$87.84	15 days	pending	View Details Receive Full 9 Receive Partial Cancel	✓ Sent! 10/07/26
PO-26-246	Prairie Valley Dairy Co-op	Whole Milk	1000	\$1,240.00	29 days	cancelled	View Details	✓ Sent! 10/01/26
PO-26-245	CleanWorks Sanitation	Food-Grade Sanitizer Concentrate	60	\$355.20	42 days	cancelled	View Details	✓ Sent! 10/05/26

Purchasing → Purchase Orders — status, Sent date, and receiving buttons on each row.

Receiving a Purchase Order

Purchase Orders are about receiving what you ordered. Receiving adds the quantity to stock; whether you've paid the vendor is handled in your accounting system, so there is no separate "Paid" step in Cheetah

Smart.

- 1 Receive Full** (or **Receive All Items** on a multi-line PO) receives the whole order. A confirmation shows what is about to happen — choose Confirm to go ahead or Cancel to leave everything as it was.
- 2 Receive Partial** lets you type the quantity that actually arrived; the PO stays open for the rest, and **Receive Remaining** later receives whatever is left.
- 3 Cancel** cancels a PO that won't be filled. A cancelled PO drops out of your payables forecast.
- 4 View Details** opens the PO's order date, vendor, item and quantity, unit cost, total, ship-to, lead time, status, Notes, and Internal Notes.

Supply Check: late-material warnings

Supply Check answers one question before it becomes a crisis: **will a late delivery hurt an order we promised?** Cheetah Smart compares the due date of every open Purchase Order with the materials your open Manufacturing Orders and Sales Orders need, and tags the orders a late supplier puts at risk. It never moves your production dates on its own — it tells you, and you decide.

A PO's due date is the **supplier-confirmed expected delivery** when you have entered one, otherwise the order date plus the material's lead time. A PO counts as late when it is overdue by more than the **grace days** (3 by default; change it under **Supply Check** in Settings → Company & Tax). Each tagged order is colored by how serious it is:

- 1 Red** — nothing else covers the need. Stock on hand and other open POs together are not enough, so the order really is at risk.
- 2 Amber** — the need is covered for now by stock or another PO, but a late PO is in the way. Keep an eye on it.

You will see the SUPPLY CHECK tag in four places: on Manufacturing Orders, on Sales Orders, in the Purchasing list (late POs carry a LATE tag, and **Show Late?** filters to them), and on the Dashboard, where **Late Purchase Orders** and **Orders at Risk** are counted in Worth a Look.

☐	MO NUMBER %	FROM SALE %	PRODUCT %	QTY %	LINKED PO %	STATUS %	EST. COMPLETION %				
	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...				
☐	MO-26-114	SO-26-145	Dark Chocolate 3-Gallon Tub	20	-	pending	2026-11-23	Start	Use Stock (39)	Complete	Cancel
☐	MO-26-113	SO-26-132	Waffle Cone Pack (100 ct)	68	-	pending	2026-11-23	Start	Use Stock (34)	Complete	Cancel
☐	MO-26-112	SO-26-162	Dark Chocolate 3-Gallon Tub	32	-	pending	2026-11-19	Start	Use Stock (39)	Complete	Cancel
☐	MO-26-111	SO-26-185	Vanilla Bean 3-Gallon Tub	36	-	pending SUPPLY CHECK	2026-11-03	Start	Use Stock (47)	Complete	Cancel
☐	MO-26-110	SO-26-168	Cookie Dough Pint	480	-	pending SUPPLY CHECK	2026-10-30	Start	Use Stock (477)	Complete	Cancel
☐	MO-26-109	SO-26-214	Chocolate-Dipped Vanilla Bar (Box of 24)	54	-	pending SUPPLY CHECK	2026-10-28	Start	Use Stock (49)	Complete	Cancel
☐	MO-26-108	SO-26-156	Gift Assortment (4 Pints)	78	-	pending SUPPLY CHECK	2026-10-28	Start	Use Stock (9)	Complete	Cancel
☐	MO-26-107	SO-26-172	Waffle Cone Pack (100 ct)	52	-	pending	2026-10-26	Start	Use Stock (34)	Complete	Cancel
☐	MO-26-106	SO-26-195	Dark Chocolate Quart	204	-	pending SUPPLY CHECK	2026-10-26	Start	Use Stock (228)	Complete	Cancel
☐	MO-26-105	SO-26-202	Strawberry Swirl Pint	384	-	pending SUPPLY CHECK	2026-10-23	Start	Use Stock (326)	Complete	Cancel
☐	MO-26-104	SO-26-125	Strawberry Swirl 3-Gallon Tub	28	-	pending SUPPLY CHECK	2026-10-20	Start	Use Stock (15)	Complete	Cancel
☐	MO-26-103	SO-26-161	Strawberry Swirl 3-Gallon Tub	40	-	pending SUPPLY CHECK	2026-10-20	Start	Use Stock (15)	Complete	Cancel
☐	MO-26-102	SO-26-149	Strawberry Swirl 3-Gallon Tub	16	-	pending SUPPLY CHECK	2026-10-19	Start	Use Stock (15)	Complete	Cancel

Manufacturing Orders — orders put at risk by a late purchase order carry a SUPPLY CHECK tag.

Click a tag to open the Supply Check panel for that order. For each material it shows what is in stock, what open orders need, the late purchase orders and how many days late each is, and which orders depend on it. From the panel you can **Mark received** when the material arrives, **Update expected date** once the supplier tells you a new one, or **Contact supplier**.

Supply Check: MO-26-111

RM-002 · Heavy Cream COVERED FOR NOW

In stock now: 501.55 Liters · Needed by open orders: 481.66 Liters

LATE PURCHASE ORDER

PO	Supplier	Outstanding	Was due	Status	Actions
PO-26-105	Prairie Valley Dairy Co-op	297 Liters	10/12/26	6 days late	Mark received mm/dd/yyyy Update expected date Contact supplier

ORDERS THAT NEED IT

Order	Needed by	Quantity	Coverage
Manufacturing Order MO-26-101	No date	20.16 Liters	Covered by stock / other PO
Manufacturing Order MO-26-102	10/18/26	28.8 Liters	Covered by stock / other PO
Manufacturing Order MO-26-103	10/19/26	72 Liters	Covered by stock / other PO
Manufacturing Order MO-26-104	10/19/26	50.4 Liters	Covered by stock / other PO
Sales Order SO-26-161	10/20/26	4.18 Liters	Covered by stock / other PO
Sales Order SO-26-125	10/20/26	50.4 Liters	Covered by stock / other PO
Manufacturing Order MO-26-105	10/22/26	29.18 Liters	Covered by stock / other PO
Manufacturing Order MO-26-106	10/25/26	31.01 Liters	Covered by stock / other PO

The Supply Check panel — late POs, days late, and the orders that need the material.

Tip

Enter the supplier's confirmed date as the PO's expected delivery as soon as you get it. Supply Check then judges the PO against what the supplier actually promised, not a generic lead time.

Worth a Look

- Low Stock Alert: 2 item(s)
- Late Purchase Orders: 1 late
- Orders at Risk (Supply Check): 20 covered
- Overdue Invoices: 158 · \$37,391
- On-Time Delivery Rate: 32%
- TOP CUSTOMERS (2026): Northfield University

Productivity 2026

This Year ▼

	COUNT	AMOUNT
Products	236	\$544,600
Components	0	\$0
Parts	10	\$4,030
Service In	2	\$948
Service Out	19	\$7,640
Purchase Orders	56	\$58,310

Inventory Value

Materials	\$31,821
Components	\$5,917
Finished Goods	\$11,247
Total	\$48,985

2 item(s) below reorder point

Dashboard — Worth a Look counts Late Purchase Orders and Orders at Risk.

Drop-shipping straight to a customer

When a vendor will ship directly to your customer instead of to you, set the PO's Ship-To to **Drop Ship** and pick the Sales Order or Parts Sale it covers from the search-and-select picker. The linked order number then

shows on the PO row.

What the vendor sees

A drop-ship PO shows your Bill-To address and your customer's Ship-To address side by side, plus a bold note telling the vendor the order ships directly to your customer, not back to you.

Reorder Suggestions

Reorder Suggestions tells you what to order and how much, calculated from stock on hand, open production, open Purchase Orders, upcoming demand within each item's lead time, and the **Plan ahead** window you choose at the top (for example 30 days beyond lead time). The **Future Stock** column is the result of that math; compare it with the **Reorder Point**, **Avg Monthly Usage**, and **Lead Time**, and Cheetah Smart proposes a **Suggested Qty**.

- 1 Open **Purchasing** → **Reorder Suggestions** and set **Plan ahead**.
- 2 For a purchased material, review the Suggested Qty and click **Create PO** on the row (or tick several rows and act together). Components and finished goods show **Build via BOM** instead, because you make those rather than buy them.

SKU	ITEM	FUTURE STOCK	REORDER POINT	AVG MONTHLY USAGE	LEAD TIME	SUGGESTED QTY	
SC-GIFT-016	Gift Assortment (4 Pints) (FINISHED PRODUCT)	9	10	72.0/mo	—	11	Build via BOM
COMP-011	Waffle Cone (COMPONENT)	-1,400	1,400	6333.3/mo	—	4,200	Build via BOM
COMP-006	Strawberry Swirl (COMPONENT)	-38.2	21.4	133.3/mo	—	81	Build via BOM
COMP-004	Vanilla Flavor Blend (COMPONENT)	-3.3	26.2	146.1/mo	—	55.7	Build via BOM
COMP-002	Custard Base (Egg-Enriched) (COMPONENT)	-64.32	9.4	36.5/mo	—	83.12	Build via BOM
COMP-001	White Base Mix (COMPONENT)	-1,704.28	577.9	3326.9/mo	—	2,860.08	Build via BOM
☐ RM-028	Three-Gallon Tub with Lid (MATERIAL)	42.6	119	253.3/mo	14 days	200	Create PO
☐ RM-023	Dark Coating Compound (MATERIAL)	35.35	38	161.5/mo	7 days	50	Create PO
☐ RM-015	Strawberry Puree (MATERIAL)	-38.25	14	100.0/mo	4 days	150	Create PO

Reorder Suggestions — auto-calculated from stock, demand, lead time, and your planning window.

Service Orders, Vendors, and Components / Materials

Service Orders are the purchasing side of outside services you buy (subcontracted work, for example) rather than physical materials. **Vendors** holds each supplier's contacts and terms the same way Customer Master does for customers, including Make Inactive. **Components / Materials** is where you maintain the Material Master — raw materials and purchased services, each with its own MOQ, lead time, vendor pricing, and primary supplier — plus a read-only Components Master. What a component is actually made of is

edited in BOM Builder (Chapter 4).

CHAPTER 7

Integrations

Cheetah Smart connects to the accounting and sales tools you already run, so your books and your storefront stay in step with what's happening in Sales, Stock, and Production. Everything is connected from **Settings** → **Integrations** (the gear icon, top right).

Connecting QuickBooks Online or Xero

- 1 Open **Settings** → **Integrations**. Connecting or disconnecting QuickBooks is limited to users with the Admin role.
- 2 Find QuickBooks Online or Xero in the grid and click **Connect**.
- 3 You'll be sent to sign in and authorize on QuickBooks' or Xero's own site — Cheetah Smart never sees or stores your accounting password. (Xero may ask which organization to connect.)
- 4 Once connected, use **Configure Sync** to choose what flows between the systems and to map your item categories to the right income and expense accounts in your books.

How the sync runs

Once connected and mapped, records sync in both directions on a regular schedule (about every 15 minutes). Record a payment in QuickBooks or Xero and it appears on the same invoice in Cheetah Smart on the next sync — matched to that invoice, never duplicated.

Why Register Payment may be hidden

Once QuickBooks, Xero, or Sage is connected, that system becomes your payment system of record. Cheetah Smart's own **Register Payment** button steps aside on invoices tied to it, rather than letting two systems both claim to know whether an invoice is paid. See Chapter 8 for where Register Payment lives when no accounting system is connected.

Sage Business Cloud Accounting

Sage appears in the same grid. Sage Business Cloud Accounting is available for businesses in the UK, Ireland, and Canada, and connects the same way as the others.

Shopify

Shopify gets its own **Shopify** menu in the main navigation once a store is connected, because it needs a live product list rather than a one-time setup.

- 1 Connect your store under **Settings** → **Integrations**, the same way as the accounting tools.

- 2 Open the **Shopify** menu. **Shopify Sync** lists every material, component, and product Cheetah Smart knows about — check **Shows in Shopify** on a row to make it a live storefront product.
- 3 Online orders flow into Sales and Stock automatically, so a storefront sale is reflected in the same stock numbers your production floor sees.
- 4 Use **Shopify Customers** to bring in your storefront's customer list. It is a manual, reviewed import rather than an automatic one, specifically so a returning customer is never created twice.

Bulk price changes

Check the rows you want on Shopify Sync, enter a percentage in the adjustment box above the table, and click Apply to raise or lower those items' Shopify price all at once.

Coming soon, and requests

WooCommerce and Amazon are shown as **Coming Soon**; tick the interest box on a card to tell us you want it. At the bottom of the page, **Request an Integration** lets you tell us about any other tool you use. The Data Manager's External Sync Status panel (Chapter 11) shows the state of everything you've connected.

CHAPTER 8

Invoice & Shipping

The Invoice & Shipping menu is where an order becomes money and a shipment. It has two sub-tabs: **Overview/Unbilled**, a worklist of every order that still needs invoicing, shipping, or payment, and **Invoices**, the invoices you've already created with their payment and shipping status.

Creating invoices

- 1 Open **Invoice & Shipping** → **Overview/Unbilled**. Every open Sales Order and Parts Sale that hasn't been invoiced is listed. Orders that have already been invoiced are hidden unless you tick **Show Invoiced?**.
- 2 Tick the checkbox on one order or several.
- 3 Click **Create Invoice** once. Cheetah Smart makes **one invoice per customer** from everything you ticked, so five orders for three customers become three invoices.
- 4 Find the new invoices on the **Invoices** sub-tab. Open one with View Details to see its line items, freight, payments, and balance, and to print or email it.

There is no per-row Create Invoice button: invoicing is always done from the checkboxes, so a batch of orders is one action.

Registering payments

When money comes in, click **Register Payment** on the order's row in Overview/Unbilled. Enter the date, method, and amount, and the balance updates. You can register several installments against one order; each shows in the payment history with a running balance. An order that has already been invoiced keeps its Register Payment button, now applied to the invoice, until the balance reaches zero. Partial payments are fully supported.

Accounting system connected?

If QuickBooks, Xero, or Sage is connected, record the payment there instead. It flows back automatically, and Register Payment is hidden to prevent entering the same payment twice (Chapter 7).

Marking an order shipped

Mark as Shipped is available on rows in both Overview/Unbilled and Invoices. It records the shipped date, who organized the shipment, the transportation method, and the tracking or bill-of-lading number, separately from payment status. An order can be shipped and unpaid, paid and unshipped, or both, and the row shows whichever combination is true.

Filtering the Invoices list

The Invoices sub-tab has two filters above the table. **Show Shipped** brings in invoices whose goods have already shipped, and **Show Unpaid** narrows the list to invoices that still have a balance — the quick way to see who owes you money. A mistaken invoice can be reversed from its View Details popup with **Reverse Invoice**.

AAA - Snowboard Ice Cream Co [Log out](#)

Snowboard Ice Cream

Dashboard Sales Production Stock Purchasing Customers **Invoice & Shipping** Operations Tasks Data Manager

Overview/Unbilled **Invoices**

Invoices & Payments

Search Invoices...

+ New Invoice ☐ Show Shipped? ☐ Show Unpaid ☒ Show Inactive?

☐	INVOICE #	CUSTOMER	AMOUNT	BALANCE	PAYMENT	ISSUE DATE	DUE DATE	SENT
	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	
☐	INV-26-155	QA Test Creamery LLC	\$155.98	\$0.00	Paid	2026-10-11	2026-11-10	View Details Mark as Shipped ✓ Sent! 10/11/26

Invoice & Shipping → Invoices — payment and shipping status, with Show Shipped and Show Unpaid.

CHAPTER 9

Operations

Operations has two sub-tabs: **Inventory**, a unified view across materials, components, and finished products in one table, and **Finance**, where you choose a costing method and see your cash flow forecast.

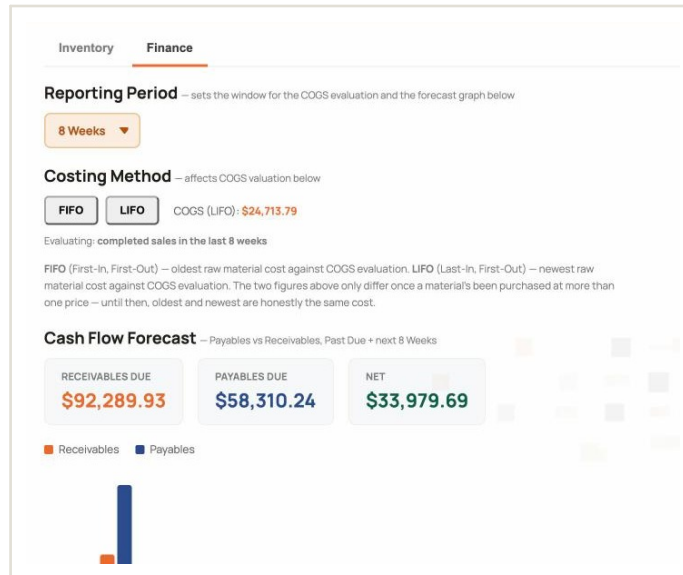
Inventory

The Stock Overview puts every stocked item in one table: **Current Stock**, **In Formulations** (how much the formulas you've defined would consume), **Required in Production Now**, **Future Stock**, **MOQ**, and **Need to Purchase**. Items you make show **Build via BOM** in the Order column; items you buy let you order directly. **Select All Needing Purchase** ticks every row that is short so you can raise the Purchase Orders in one pass. Use the search box and column filters to focus on one item or area.

Finance: costing method and cash flow forecast

- 1 Open **Operations** → **Finance** and set the **Reporting Period** (for example 8 Weeks). It sets the window for both the cost-of-goods-sold figure and the forecast chart.
- 2 Choose **FIFO** or **LIFO** as your costing method. FIFO (First-In, First-Out) values cost against the oldest material cost on hand; LIFO (Last-In, First-Out) uses the newest. The two only differ once a material has been purchased at more than one price; until then they show the same number. The COGS figure beside the buttons covers completed sales in your chosen period.
- 3 Review **Receivables Due**, **Payables Due**, and **Net** in the Cash Flow Forecast, then the chart underneath, which breaks the same figures down by week, including anything already past due.

Receivables are the unpaid balances on Sales Orders, Parts Sales, and open Invoices. **Payables** are every non-cancelled Purchase Order, counted as due on its order date plus the vendor's payment terms — so cancel a PO and it drops out of the forecast. Registering a payment on an invoice moves it out of Receivables immediately.



Operations → Finance — costing method and the Cash Flow Forecast.

CHAPTER 10

Tasks

Tasks is a shared to-do list built into the ERP — for follow-ups that don't belong on a specific order, like “call vendor about a price change” or “confirm new customer's tax exemption.” The number beside Tasks in the main menu shows how many are currently open, and the same count appears on the Dashboard.

Creating a task

- 1 Open **Tasks** from the main menu and click **+ New Task**.
- 2 Fill in a title, description, priority, and due date, then pick an **Assignee** from your active team members.
- 3 Add **Watchers** if anyone else should see the task without owning it — type in the search box to filter your team, check as many names as you like, or use the master checkbox to select everyone at once.
- 4 Save. The assignee and every watcher with an email on file automatically get an email with the task's title, priority, due date, and description.

Working a task

Click any task to open its detail view. From there you can update its status, add or remove Watchers, and leave comments. Every comment is kept as a running conversation on the task, visible to the assignee and every watcher.

- 1 **Pass Task** reassigns the task to someone else on your team; the new assignee takes over.
- 2 Use the column filters above the task table to find a task by title, assignee, priority, or status.
- 3 **Mark Complete** when it's done.

Who can see a task

A task is visible to its assignee, its creator, and anyone added as a Watcher. Watchers are the way to loop someone in without reassigning the task.

CHAPTER 11

Data Manager

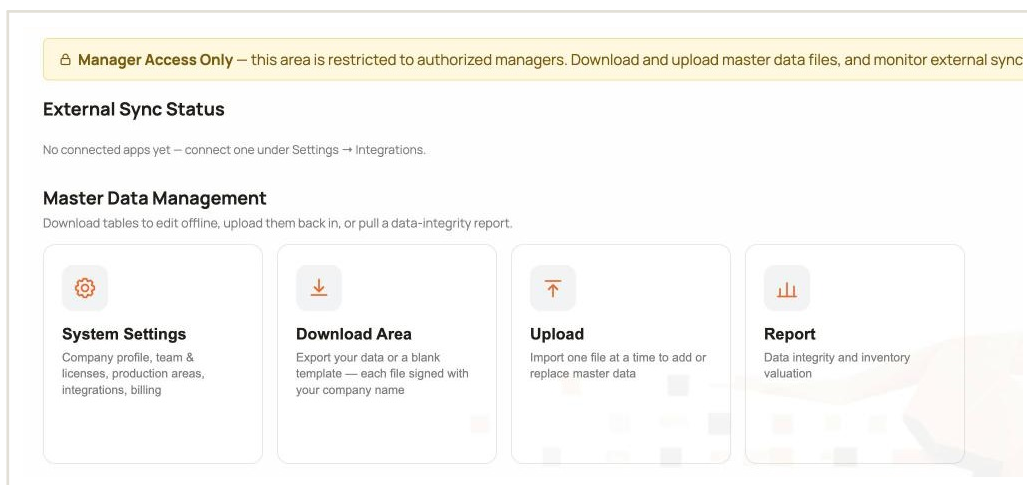
Data Manager is manager-access only. It is where you work with master data in bulk — getting your existing customers, vendors, materials, and products in, taking data out to edit in a spreadsheet — and where you check on any connected integrations.

The page opens with an **External Sync Status** panel showing the connection state and last sync time for QuickBooks, Xero, Sage, and Shopify, if you've connected any under Settings → Integrations (Chapter 7); if nothing is connected it says so. Below it, **Master Data Management** has four tiles:

- 1 **System Settings** — a shortcut to Company Settings (Chapter 12).
- 2 **Download Area** — export your current data for any master table, or a blank template, as a file you can open in a spreadsheet. Each exported file is signed with your company name.
- 3 **Upload** — import one file at a time to add new records or replace existing master data, instead of typing rows into the app one by one. Files follow the same columns as the Download Area, so the easiest start is to download the blank template, fill it in, and upload it.
- 4 **Report** — run a data-integrity and inventory-valuation report to catch problems before they ripple into orders and costing.

Replace with care

Uploading in Replace mode swaps out the existing records for that table. Download a copy first if you might want to go back.



Data Manager — sync status plus Download, Upload, and Report tiles.

CHAPTER 12

Settings

Click the gear icon in the top-right corner from anywhere in the app to open Settings. It is organized into five areas down the left side, with links to the legal documents and this manual beneath them. Use **Back** to return to where you were.

Company & Tax

This is your company profile: logo, legal company name, DBA (business name), industry, Federal Tax ID, address, website, and a communication email. It is what prints on every invoice, purchase order, and packing slip, and the DBA is the name the app uses everywhere. Tick **Show company name next to the logo in the header** to display your name beside your logo. The same page sets **sales tax**: a checkbox for each customer type — Resale, Out of State, Retail/Final, and Export — decides which customers are charged tax. Under **Supply Check**, **Grace Period (days)** sets how many days past due a Purchase Order may run before it counts as late (3 by default; see Chapter 6).

Settings → Company & Tax — the profile shown on every generated document.

Production Areas

Configure **serial numbers** — fixed text, an auto-incrementing counter, or both — generated automatically when a Manufacturing Order is created. You can also define your storage areas here and assign materials and components to them.

Team & Licenses

Your plan includes a set number of concurrent sign-ins, and this page shows how many seats are in use. The table lists each team member's name, user, whether they were invited, status, and type (role), with

spare licenses shown as **Available**.

- 1 Click **+ Invite Teammate** (or **Send Invite** on an Available license).
- 2 Enter the person's **full name** and **work email** and pick their **type** — Admin, Manager, or User. Click **Send Invite**.
- 3 They receive an email invitation and set up their own sign-in. Until they accept, the row shows as invited; **Resend** sends it again, and you can cancel an invitation you sent by mistake.
- 4 Change a person's type from the dropdown on their row, or click **Remove** to end their access — they're signed out immediately and would need a fresh invite to return.
- 5 Need more people than your plan includes? Click **+ Add Seat**, or change plans in Billing.

Roles. **Admin** has full access, including this Settings area. **Manager** can take critical actions — add products, change prices and costs, delete products or orders. **User** is scoped to daily operations — entering orders, customers, and vendors. **Security & Active Sessions**, further down the page, lists every device currently signed in with a Sign Out control for each.

Company Settings → **Team & Licenses**

Your plan includes 10 concurrent sign-ins — a license can't be active on two devices at once. Signing in on a new device signs that license out elsewhere automatically.

4 of 10 seats used + Add Seat + Invite Teammate

NAME	USER	INVITED?	STATUS	TYPE	
Michael Oelatto	AAA	NO	Active	Admin	Remove
Pearl Swirlzen	pearl@snowboard.com	NO	Active	Manager	Remove
Patricia Chantycreeam	patricia@snowboard.com	NO	Active	User	Remove
Invite someone for this license...	—	—	Send Invite	Available	—
Invite someone for this license...	—	—	Send Invite	Available	—
Invite someone for this license...	—	—	Send Invite	Available	—
Invite someone for this license...	—	—	Send Invite	Available	—

Settings → Team & Licenses — seats used, invitations, and each teammate's type.

Integrations and Billing

Integrations is where you connect QuickBooks, Xero, Sage, and Shopify (Chapter 7). **Billing** shows your plan, seat count, and payment method; use **Update Card** to enter a new card securely, change plans as your team grows, or cancel your subscription. The legal documents — Terms of Service, Subscription, Billing & Cancellation Terms, Acceptable Use policy, and Data Processing & Security Addendum — and this **User Manual** are linked from the left sidebar.

CHAPTER 13

Documents, Printing & Email

Anywhere Cheetah Smart produces a document — an Invoice, Sales Order, Quote, Purchase Order, Packing Slip, Picking List, Stickers, Packing List, or a customer Price List — the same print and email pattern is available.

Printing and PDFs

- 1 Open the record's document menu: **Print / Export** on most records, or **Print Documents** on a Manufacturing Order or Production Run.
- 2 Choose the document(s) you need. They open ready to print, or to save as a PDF from your browser.
- 3 Documents show your company logo and address, the customer's or vendor's full Bill-To and Ship-To addresses, the document number with its date, and, on invoices and orders, the real payments and calculated balance.

Two documents deserve a special mention because of what they show someone outside your company. The Sales Order's **Packing Slip** lists line items and quantities with no pricing, for the warehouse and the shipment. A **drop-ship Purchase Order** shows your Bill-To and your customer's Ship-To together, with a bold note telling the vendor the shipment goes straight to that customer.

Sending a document by email

Click **Send Email** to prepare the same document as an email. Cheetah Smart builds a real PDF attachment, writes a message suited to the document, and sends it through the communication email set in your company settings, so it goes out from your own address rather than a generic one. You can edit the subject and message before sending. **Send Email** appears on Customer and Vendor rows, on Invoices, Purchase Orders, Sales Orders, and Quotes, on the customer Price List, and inside every Print and Print Documents menu. On a Purchase Order the **Sent** column flips to a green check with the date once it's sent.

What each email says

Each message is filled in from the record; anything missing is left out, and you can edit it before sending.

- 1 **Invoice** — the total, the amount received so far, the balance due, and the due date, with a reminder to quote the invoice number (or a thank-you if it is paid in full).
- 2 **Purchase Order** — the items, order total, lead time, ship-to (your warehouse, or the customer for a drop ship), and notes, asking the vendor to confirm quantities, pricing, and ship date.
- 3 **Sales Order, Quote, and others** — the items, total, and expected delivery (or quote validity), plus a short note on what is attached.

CHAPTER 14

Pricing

Every item you sell — a finished product, a component, or a raw material sold on its own — has a default price built into Cheetah Smart, and any customer can carry their own special pricing that overrides it automatically. Both halves are included on every plan, Starter through Enterprise; there is nothing extra to unlock.

The default: Selling Price Base and List Price

Every Final Product has a **Selling Price Base**, set in the BOM Builder (Chapter 4) alongside its formula. Every Component, and any raw material sold directly under Parts and Services, prices at **List Price** instead — its cost times the **Parts Sales Multiplier** you set on the item. Both figures appear on a highlighted line at the bottom of the BOM Builder, next to the Total Cost per unit, so you can see your margin the moment you change a formula, a batch yield, or the multiplier.

The override: Customer Price Lists

A customer's own Price List (Chapter 3) always wins over the default for that customer, for any item it covers. Set a flat **regular price**, a **volume price** that applies only once the order quantity reaches the minimum you choose, or both. Cheetah Smart checks that customer's Price List first every time a price is worked out on a Sales Order or a Parts and Services line. There is nothing to switch on and nothing to set per order.

How the price is chosen, in order

- 1 Does this customer have a Price List entry for this item, and does the order quantity reach its volume minimum? Cheetah Smart uses that **volume price**.
- 2 No volume match, but a **regular price** is set on their Price List for this item? Cheetah Smart uses that regular price.
- 3 No Price List entry at all for this customer and item? Cheetah Smart falls back to the item's own **Selling Price Base** (Final Products) or **Cost × Multiplier** (Components and Materials).

Example

A distributor and a café both order the same pint. The café has no Price List entry, so it pays the Selling Price Base set in the BOM Builder. The distributor has a negotiated volume price once it orders 50 or more units, and Cheetah Smart applies it automatically — no extra step on the order.

CHAPTER 15

Getting Help

If you get stuck, you have three places to turn, from fastest to most personal.

- 1 The support assistant.** Click the question-mark icon in the app's header and ask in plain words. It answers from this manual and the FAQ, and can hand you to a person if it can't solve something.
- 2 The FAQ.** Visit cheetah-smart.com/faq and use the search bar to jump straight to a topic. It is also available in Spanish.
- 3 People.** For anything else, email cheetah-mail@cheetah-smart.com — we're here to cheetah-serve you. This manual is always available from Settings, and at cheetah-smart.com/manual to read, download, or print.

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