USER MANUAL

CAFLAT.CORE

The operating system behind every great café.
Complete reference for owners, managers, and staff.

Version 3.0
2026 Edition

CAFLATCORE.COM

CONTENTS

What's inside.

01 Getting Started

Caflat.CORE runs entirely in your browser — no installation required. Open `caflatcore.com` on any modern browser and the Setup Wizard launches automatically on first use.

Setup Wizard

The first time you open Caflat.CORE, a guided Setup Wizard walks you through initial configuration.

1. **Create an admin account** — Enter a username and a secure password. The username must be unique within the system; it cannot be changed later without a data reset.
2. **Set your café name** — This appears on receipts and reports.
3. **Choose your currency** — Select the currency used for all transactions.
4. **Select active modules** — Enable the optional modes your café needs (Supplier, Events, Production, Treasury). You can change this later in Settings.
5. **Complete setup** — You are taken directly to the Dashboard.

> IMPORTANT
> All data is stored locally in your browser. Use the **Data Backup** feature (Settings → Data) regularly to export and preserve your records.

User Roles

Caflat.CORE supports two roles:

Role	Access
Admin	Full access — all modules, settings, reports, data management
Staff	POS and Inventory only — cannot access reports, settings, or sensitive data

Additional staff accounts can be created in **Settings → Users** after initial setup.

Logging In

1. Open `caflatcore.com` in your browser.
2. Enter your username and password on the login screen.
3. Click **Log In**. The Dashboard loads immediately.

Navigating the App

The left sidebar contains all main navigation items. The top bar shows the current screen name and quick-action buttons. On smaller screens, the sidebar collapses into a hamburger menu.

> **OFFLINE USE**
>
> Caflat.CORE is 100% offline-first. All features work without an internet connection. Cloud sync (Cloud plan) runs in the background when connectivity is available.

02 Point of Sale (POS)

The POS screen is the core of daily operations. Use it to take orders, add items, process payments, and issue receipts.

Taking an Order

1. Open the **POS** screen from the sidebar.
2. Tap any product from the menu grid to add it to the current order.
3. Adjust quantity using the **+** / **−** buttons on each line item.
4. Add a **note** to any item (e.g., "no sugar") by tapping the item row.
5. Tap **Charge** when the order is ready to process.

Payment Methods

Caflat.CORE records payment method for every transaction:

- **Cash** — Enter the amount tendered; change is calculated automatically.
- **Card** — Mark as card payment; no terminal integration required.
- **GCash / Digital** — Record digital payment for reporting purposes.
- **Split** — Divide a bill between payment methods.

Order Tickets

Each completed order generates a **ticket** with a sequential receipt number. Tickets are stored in Sales history and can be printed or shared as digital receipts.

Discounts

Apply discounts at the order level before charging. Discounts are logged with each transaction and appear in reports.

Open Orders / Hold

Orders can be held and resumed — useful for table service where customers order in stages. Held orders appear in the **Open Orders** panel on the right side of the POS screen.

> TIP
>
> Use **category filters** at the top of the menu grid to quickly find items by type (Coffee, Food, Retail, etc.).

03 Products & Ingredients

Products

Products are the items customers purchase. Go to **Products** in the sidebar to manage your menu.

Adding a Product

1. Click **New Product**.
2. Enter the product name, price, and category.
3. Optionally upload a photo and add a short description.
4. Link ingredients to build a recipe (see below).
5. Save. The product immediately appears in the POS grid.

Product Fields

Field	Description
Name	Displayed on POS and receipts
Price	Selling price (before discounts)
Category	Used to group items in the POS grid
SKU	Optional internal code for tracking
Recipe	Linked ingredients with quantities
Recipe Mode	Per-unit or Batch (for items made in batches)

Ingredients

Ingredients represent raw materials your café uses. They drive inventory tracking and cost calculations.

Adding an Ingredient

1. Go to **Ingredients** in the sidebar.
2. Click **New Ingredient**.
3. Set the name, unit of measure (g, ml, pcs, etc.), and cost per unit.
4. Enter the current stock quantity.
5. Optionally set a low-stock alert threshold.

Building Recipes

Linking ingredients to products enables automatic inventory deduction and cost calculation:

1. Open a product in edit mode.
2. In the **Recipe** section, add ingredients one by one.
3. Set the quantity used per unit (or per batch if in batch mode).
4. Save — every time this product is sold, ingredient stock decreases automatically.

> **BATCH MODE**
>
> Set **Recipe Mode → Batch** for items made in batches (e.g., pastries). Enter total batch yield and Caflat.CORE calculates per-unit ingredient use and cost automatically.

Inventory

Inventory tracks current stock levels for all ingredients. Stock decreases automatically as products are sold (when ingredients are linked to product recipes).

Inventory Screen

The Inventory screen shows every ingredient with its current quantity, unit, and status (OK / Low / Out). Items below the low-stock threshold are highlighted for easy identification.

Manual Adjustments

Correct stock levels at any time:

1. Find the ingredient in the Inventory list.
2. Click **Adjust**.
3. Enter the actual current quantity or the adjustment amount.
4. Select a reason (Restock, Waste, Correction, etc.).
5. Confirm — the adjustment is logged with a timestamp.

Restocking

When you receive a delivery, use **Restock** to add quantities. If Supplier Mode is active, link the restock to a purchase order for automatic invoice tracking.

Low Stock Alerts

Each ingredient has a configurable **minimum threshold**. When stock falls below this level, the ingredient is flagged in Inventory and appears in the Shopping List widget.

Adjustment History

Every manual adjustment is recorded with: date, time, user, reason, before/after quantities. Access the full log via **Inventory** → **History**.

> AUTO-DEDUCTION
>
> Ingredients are deducted from inventory automatically only when the product has a linked recipe. Products without recipes do not affect inventory.

Sales & Dashboard

Dashboard

The Dashboard is the first screen after login. It shows a real-time overview of your café's performance for the current day.

Key Metrics

Metric	Description
Today's Revenue	Total sales for the current calendar day
Transactions	Number of orders completed today
Average Order Value	Revenue ÷ transaction count
Top Products	Best-selling items by quantity today
Low Stock Items	Ingredients below their alert threshold

Sales History

Go to **Sales** in the sidebar to see every transaction. Filter by date, payment method, or amount. Click any transaction to view its full details and receipt.

End of Day

The **End of Day** feature produces a daily summary report:

1. Navigate to **End of Day** from the sidebar or dashboard.
2. Review the day's totals: revenue, transactions, voids, discounts.
3. Reconcile cash if needed (enter actual drawer count).
4. Close the day — the summary is saved to reports history.

> TIP
>
> Close the day every evening before leaving. It locks the day's records and makes month-end reporting accurate.

Revenue Breakdown

The Dashboard and Reports screens can break revenue down by category, payment method, and time of day — helping you understand peak hours and your most profitable product lines.

06 # Reports

Reports give you a historical view of sales, inventory, and financial performance. Access via **Reports** in the sidebar.

Sales Report

Filter transactions by date range, payment method, or product. The report shows:

- Total revenue for the period
- Transaction count and average order value
- Revenue by payment method (Cash, Card, Digital)
- Top-selling products with quantity and revenue
- Discounts and voids totals

Inventory Report

Shows stock levels over time, restock events, and consumption rates. Useful for identifying waste and optimizing order quantities.

Supplier Report

Available when Supplier Mode is active. Shows purchase order history, total spend per vendor, and pending invoices.

Exporting Reports

PRO, CLOUD, ENTERPRISE

Export any report as **PDF** or **CSV** for accounting, tax filing, or external analysis:

1. Set your date range and filters.
2. Click **Export** in the top-right of the report.
3. Choose PDF (formatted) or CSV (raw data).
4. The file downloads to your device immediately.

> FREE PLAN
>
> The Free plan includes the Daily Summary report. Full report access and exports require Pro or above.

07 Supplier Mode

OPTIONAL MODE

Supplier Mode tracks every vendor relationship — purchase orders, deliveries, invoices, and spend — in one place. Enable it in **Settings → Modules**.

Adding Suppliers

1. Go to **Supplier** in the sidebar.
2. Click **New Supplier**.
3. Enter the vendor name, contact details, and payment terms.
4. Optionally link default ingredients supplied by this vendor.

Purchase Orders

Create a purchase order (PO) when you place an order with a supplier:

1. Open a supplier and click **New Order**.
2. Add line items (ingredients) with quantities and agreed prices.
3. Set the expected delivery date.
4. Save as **Pending**.

Receiving Deliveries

When goods arrive, mark the PO as **Received**:

1. Open the pending order.
2. Confirm quantities received (adjust if delivery was short).
3. Mark as Received — ingredient stock is automatically updated.
4. The order moves to invoice history.

Invoice Tracking

Every received order generates an invoice record. Supplier Mode tracks total spend per vendor per month, outstanding payments, and purchase history — giving you visibility over your cost of goods.

TIP

> Linking purchase orders to ingredients means restocking is automatic on receipt — no manual inventory adjustment needed.

08 Events Mode

OPTIONAL MODE

Events Mode manages catering bookings, pop-ups, and off-site service. Each event has its own order, billing, and client record. Enable via **Settings** → **Modules**.

Creating an Event

1. Go to **Events** in the sidebar.
2. Click **New Event**.
3. Enter the event name, client name, date, location, and estimated guest count.
4. Add menu items and quantities from your product list.
5. Set pricing (per-item or package rate) and deposit amount if applicable.
6. Save — the event appears in the Events calendar.

Event Billing

When the event is complete:

1. Open the event and mark it as **Completed**.
2. Review the final billing summary.
3. Record payment received.
4. The event revenue is logged in Sales history.

Inventory Impact

If products in the event have linked recipes, ingredients are deducted from inventory when the event is marked as completed — keeping stock accurate even for off-site service.

09 Production Mode

OPTIONAL MODE

Production Mode tracks batch production runs — baking, brewing concentrates, or any process that converts raw ingredients into finished goods. Enable via **Settings → Modules**.

Creating a Production Run

1. Go to **Production** in the sidebar.
2. Click **New Run**.
3. Select the finished product being produced.
4. Enter the batch size (units to produce).
5. Caflat.CORE calculates the ingredients required based on the linked recipe.
6. Confirm ingredient availability and start the run.

Completing a Run

1. Open the active production run.
2. Enter the actual yield (may differ from target).
3. Mark as **Complete** — ingredient stock is deducted and finished goods inventory is updated.

Production History

Every production run is logged with: date, product, planned vs. actual yield, and ingredients consumed. Use this data to track waste, optimize batch sizes, and monitor kitchen efficiency.

> INTEGRATION
>
> Production runs feed directly into Finished Goods inventory, making produced items available for sale in the POS without manual stock entry.

Treasury

OPTIONAL MODE

Treasury is a manual cash and bank tracker, completely disconnected from inventory, ingredients, and sales. It answers one question at a glance: how much money does the business actually have right now, in the bank and in cash? Enable via **Settings → Modules**.

Accounts

Before logging any money movement, set up the accounts the business actually uses — cash on hand, GCash, a bank account, or anything else.

1. Go to **Treasury** in the sidebar.
2. Tap **Manage Accounts**.
3. Add an account — give it a name (e.g. "Cash Till", "BDO Checking"), choose Cash or Bank, and enter its opening balance.
4. Repeat for every account the business actually uses.

Logging a Transaction

Every entry in Treasury is either money coming in (**Add**) or money going out (**Deduct**) — tagged to an account with a plain-language reason.

1. Tap **+ New Transaction**.
2. Choose **Add Money** or **Deduct Money**.
3. Enter the amount, pick the account, and add a reason — tap a quick preset (Rent, Payroll, Supplies, Utilities, Owner Deposit, Sales Deposit, Bank Fee) or type your own.
4. Confirm the date (defaults to today) and save.

How Balances Work

Account balances are never edited by hand — they're calculated live from the opening balance plus every Add and minus every Deduct logged against that account. There is nothing to reconcile: the number shown is always accurate as long as transactions are logged as they happen.

> FULLY DISCONNECTED
>
> Treasury does not read from or write to inventory, ingredients, or sales data. It's a standalone ledger for tracking actual cash position — nothing here affects stock levels, product costs, or POS reporting.

Product Lab

BUILT-IN TOOL

Product Lab is a sandbox for testing new menu items. It reads your live ingredient prices and categories but **never writes to your live menu** unless you explicitly convert a draft to a real product.

The Three-Panel Workspace

Setup Panel

Name your draft product, pick a category, set the target selling price, and choose whether it's a per-unit or batch recipe.

Recipe Panel

Build the ingredient list using your existing ingredients and their current costs. Add packaging items with individual costs.

Results Panel

Instantly see the full cost breakdown and projected margin as you build the recipe — no saving required.

Cost & Pricing Analysis

The Results panel shows:

Line	What it shows
Ingredient Cost	Total raw material cost from your recipe
Packaging Cost	Cups, bags, labels, etc.
Labor Cost	Estimated labor per unit (configurable)
Overhead	Rent, utilities allocation per unit
Total Cost	Sum of all above
Gross Margin	(Price − Cost) ÷ Price × 100

Supply Assessment

Check whether you have enough current stock to produce a given quantity of the new product before adding it to the menu.

Converting to a Product

When your draft is ready, click **Add to Menu** — Product Lab creates a real product with the recipe pre-filled, ready for pricing and publishing to the POS.

Cost Lab

BUILT-IN TOOL

Cost Lab gives you true cost visibility for every product on your menu. It calculates ingredient, packaging, labor, and overhead costs in real time — so you can price with confidence, not guesswork.

How It Works

Cost Lab reads your existing product recipes and ingredient prices, then calculates the fully-loaded cost per unit for each item. As ingredient prices change, costs update automatically.

Cost Components

Component	Source
Ingredient Cost	Quantity × cost per unit from Ingredients
Packaging Cost	Per-product packaging items with individual costs
Labor Cost	Global default or per-product override
Overhead Cost	Global default or per-product override

Global Settings vs. Per-Product Overrides

Set a **global labor rate** and **global overhead rate** in Cost Lab settings — these apply to all products by default. Override individual products when their true cost differs (e.g., a barista-intensive specialty drink vs. a simple retail item).

Margin Dashboard

The Cost Lab overview screen shows every product with its margin percentage, sorted by profitability. Items below your target margin are highlighted so you can act:

- Renegotiate ingredient prices with your supplier
- Adjust selling price to hit margin targets
- Reformulate the recipe to reduce cost

Daily Snapshots

Cost Lab automatically snapshots product costs daily. This lets you track how ingredient price changes affect your margins over time — a built-in cost history without any manual work.

BEST PRACTICE

> Review Cost Lab monthly. Even small ingredient price changes can silently erode your margins on high-volume items. Cost Lab makes these invisible shifts visible.

Recipe Catalog

BUILT-IN TOOL

The Recipe Catalog is a standalone reference library for brewing recipes and kitchen formulas. It is separate from the product recipe system — it's a knowledge base for your team, not a cost calculation tool.

What the Catalog Is For

- Store standardized brew recipes (espresso, pour-over, cold brew, etc.)
- Document kitchen recipes for in-house production
- Keep tasting notes and quality benchmarks
- Train new staff with a reference they can look up during service

Recipe Categories

Recipes are organized by category:

DRINK DOUGH FILLING SAUCE COATING COOKIES OTHER

Recipe Fields

Field	Description
Name	Recipe identifier
Category	Type of recipe
Yield	How many units / portions this recipe produces
Ingredients	List of ingredients with quantities and units
Steps	Optional step-by-step instructions
Notes	Tasting notes, quality benchmarks, tips

Adding a Recipe

1. Go to **Recipe Catalog** in the sidebar.
2. Click **New Recipe**.
3. Fill in the details and add ingredient rows.
4. Add notes or preparation steps.
5. Save — the recipe is immediately available to all users.

DATA SAFETY

Recipe Catalog entries are included in your system backup and survive a data reset — your recipe library is never lost.

14 Shopping List

BUILT-IN TOOL

The Shopping List is a floating widget that generates purchase lists from your current stock and production needs — so you know exactly what to buy before every supplier run.

Three List Modes

Mode	What it does
Low Stock	Auto-generates a list of all ingredients below their minimum threshold. Quantities are calculated to bring stock back to target levels.
Production Jobs	Calculates ingredients needed for upcoming production runs, accounting for current stock. Shows only what still needs to be purchased.
Free List	A manual list — add any items you need by typing them in. Useful for one-off purchases.

Using the Widget

1. Click the **Shopping List** icon in the top bar (visible from any screen).
2. Choose a mode: Low Stock, Production, or Free.
3. Review the generated list. Edit quantities if needed.
4. Save the list — Caflat.CORE keeps your last 5 saved lists.
5. Share or print the list for your purchasing run.

> TIP
>
> Run a **Low Stock** list every morning before service starts, and a **Production Jobs** list before each baking or brewing session.

15 Finished Goods

Finished Goods tracks inventory for items produced in-house — pastries, bottled drinks, pre-made goods — that are made in batches and stored before selling.

How Finished Goods Flows

The typical flow:

1. A **Production Run** (Production Mode) produces a batch of goods.
2. On completion, the produced quantity is added to **Finished Goods** inventory automatically.
3. When sold through the POS, finished goods stock decreases.
4. When stock falls below the threshold, the item appears in the Shopping List (via Production Jobs mode).

Manual Adjustment

Add or correct finished goods stock manually if needed — for instance, when recording goods produced before Caflat.CORE was set up, or when reconciling after a stock count.

Expiry & Waste

Log waste or expired goods as a negative adjustment with reason "Waste". This is tracked separately in reports so you can monitor spoilage rates over time.

Finished Goods vs. Ingredients	
Ingredients	Raw materials — decrease when recipes are used
Finished Goods	Produced items — decrease when sold at POS

Management

Void a Transaction

Voiding cancels a completed sale and reverses its effect on revenue and inventory.

1. Go to **Sales** and find the transaction.
2. Open the transaction detail.
3. Click **Void** and enter the reason.
4. Confirm — the transaction is marked void and removed from revenue totals.

Refunds

Issue a refund for a completed transaction:

1. Open the transaction in Sales history.
2. Click **Refund**.
3. Enter the refund amount (full or partial) and payment method for the return.
4. Confirm — the refund is logged and deducted from revenue.

Settings

Access **Settings** from the sidebar to configure:

- **General** — Café name, currency, receipt details
- **Users** — Add staff accounts, reset passwords, change roles
- **Modules** — Enable/disable optional modes (Supplier, Events, Production, Treasury)
- **Receipt** — Customize what appears on printed and digital receipts
- **Cost Lab** — Set global labor and overhead rates

Security

Caflat.CORE uses SHA-256 hashed passwords. Staff accounts have restricted access — they cannot view reports, settings, or management screens. The admin account should use a strong, unique password.

Data Management

All data is stored in your browser's local storage. Protect it:

Action	How
Export Backup	Settings → Data → Export Backup (JSON file, downloadable)

Import Backup	Settings → Data → Import Backup (restore from JSON file)
Import CSV	Settings → Data → Import CSV (migrate products or ingredients from another POS)
Reset Data	Settings → Data → Reset (irreversible — creates a blank system)

WEEKLY REMINDER

Export a backup at least once per week. Store the file in cloud storage (Google Drive, iCloud, etc.) so you can restore your data if the device is lost or the browser cache is cleared.

Migrating from Another POS

If you are switching from Square, Lightspeed, Toast, or another system, you can import your product menu and ingredient list using the built-in CSV importer.

1. **Export from your old POS** — most POS systems let you export a product/menu list as a CSV file (look for "Export" or "Reports" in their settings).
2. **Open Import CSV** — go to *Settings* → *Data* → *Import CSV*.
3. **Select the type** — choose *Products* or *Ingredients* depending on what you exported.
4. **Upload your file** — drag and drop the CSV file onto the upload zone, or tap to browse.
5. **Map columns** — Caflat shows a preview of your CSV column names and tries to auto-match them to the right fields. Adjust any that don't look right using the dropdowns.
6. **Import** — tap Import. Caflat applies these defaults for any missing data:
   - Name missing → row is skipped entirely
   - Price missing → product imported at ₱0, flagged for review
   - Category missing → assigned to "General"
   - Unit missing (ingredients) → set to "pcs"
   - Stock / cost missing → set to 0
7. **Review the summary** — the importer shows how many items were imported, how many were skipped, and which ones need a price or cost set before selling.

After importing products, visit *Products* to confirm prices are correct and recipes are set up. After importing ingredients, visit *Inventory* to verify stock levels.

Plans

Caflat.CORE offers four plans. For current pricing, visit `caflatcore.com` .

Free

Core tools to get started. No credit card, no commitment.

- ✓ Basic POS & Inventory
- ✓ Up to 50 products
- ✓ Single device
- ✓ Daily summary report
- ✓ Community support

Pro

Complete operational backbone for independent cafés.

- ✓ All 12+ modules
- ✓ Unlimited products
- ✓ Unlimited transactions
- ✓ All 5 optional modes
- ✓ Export reports (PDF/CSV)
- ✓ Single location

MOST POPULAR

Cloud

Multi-branch operations with cloud sync and remote visibility.

- ✓ Everything in Pro
- ✓ Cloud sync across branches
- ✓ Remote dashboard access
- ✓ Multi-branch reporting
- ✓ Automatic backups
- ✓ Priority support

Enterprise

Tailored for roastery groups and multi-location brands.

- ✓ Everything in Cloud
- ✓ Custom module setup
- ✓ Dedicated onboarding
- ✓ SLA-backed uptime
- ✓ White-label options
- ✓ Direct engineering access

UPGRADING

To upgrade your plan, visit `caflatcore.com` or email `caflatcore@gmail.com` . Your existing data is fully preserved on plan upgrade.

Feature Availability by Plan

Feature	Free	Pro	Cloud	Enterprise
POS & Inventory	✓	✓	✓	✓
Products (limit)	50	∞	∞	∞
All modules & tools	—	✓	✓	✓
Report exports	—	✓	✓	✓
Cloud sync	—	—	✓	✓
Multi-branch	—	—	✓	✓
White-label	—	—	—	✓

FAQ & Reference

Frequently Asked Questions

Does it work offline?

Yes — 100% offline-first. All daily operations (POS, Inventory, Production, etc.) run without an internet connection. Cloud sync (Cloud plan) runs in the background when connectivity is restored.

What devices does it run on?

Any modern browser on a tablet, laptop, or desktop. Caflat.CORE is optimized for counter use on a dedicated iPad or tablet, but works on any device with a browser. It can be added to your home screen as a PWA for an app-like experience.

Do I need to install anything?

No. Open `caflatcore.com` in a browser and you're running. No app store, no download, no updates to manage.

What happens to my data if I cancel?

Your data is yours. Export everything (Settings → Data → Export Backup) before leaving. We do not hold your data hostage.

Can I use multiple devices?

On the Free and Pro plans, data is device-local. The Cloud plan syncs data across all your devices and branches automatically.

Can I migrate from another POS?

Yes. Go to *Settings* → *Data* → *Import CSV*. Export your product list or ingredient list from your old system as a CSV file, upload it, map the columns to Caflat fields, and import. Missing prices are imported at ₱0 and flagged so you can update them before selling. See the *Migrating from Another POS* section in the Management chapter for a full step-by-step guide.

Is there a free trial for paid plans?

The Free plan is permanently free — use it as long as you need. Request early access at `caflatcore.com` to trial Pro or Cloud features.

Receipt Information

Receipts include:

- Café name and contact details (from Settings → General)
- Receipt/transaction number (sequential, not resettable)
- Date and time of transaction
- Itemized list with quantities and prices
- Discount amount (if applied)
- Total and payment method
- Change given (cash transactions)

Contact & Support

Channel	Details
Website	caflatcore.com
Email	caflatcore@gmail.com
Support Level	Community (Free) · Email (Pro) · Priority (Cloud) · Direct (Enterprise)

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caflatcore.com