CHEETAH SMART

ERP FOR SMALL & MEDIUM BUSINESSES

User Manual

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

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

This manual walks through Cheetah Smart module by module. Each section explains what the screen is for and then gives short, numbered steps for the things you'll do most often. It's built to be read start to finish when you're new, or jumped around using the bookmarks panel in your PDF viewer once you know your way around.

Cheetah Software Solutions, LLC · 1459 TX 36 N, Rosenberg, TX 77471 info@cheetah-smart.com

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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 signing in and reading the Dashboard, which is the home screen every time you log in.

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 the username and password your administrator set up for you.
3. Click **Sign in**. You'll land on the Dashboard.

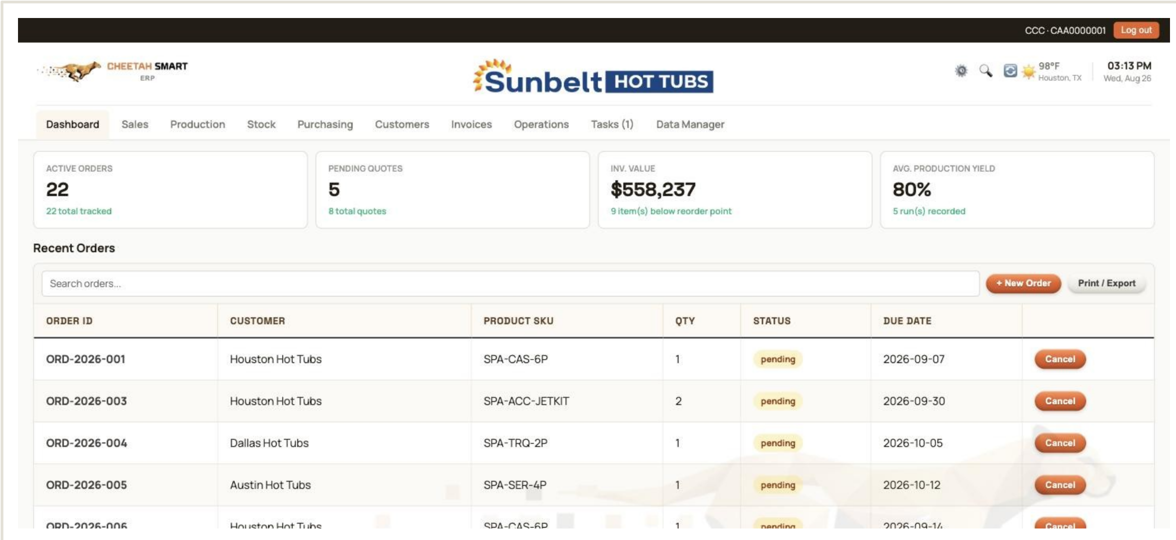
New here? If your company hasn't signed up yet, use the **Start 14-day trial** tab instead on the same page — it walks you through choosing a plan, entering your company's details, and adding a card that won't be charged until day 15. See the very last page of this manual for what to expect after you submit.

The navigation bar

Every page in Cheetah Smart shares the same top bar: your company name and a Log out button in the dark strip at the very top, your company logo and name in the header below it, and the main menu — Dashboard, Sales, Production, Stock, Purchasing, Customers, Invoices, Operations, Tasks, and Data Manager — running underneath. Most menu items open a set of sub-tabs (for example Production has Manufacturing, Production Runs, BOM Builder, and Hierarchy). The gear icon in the top-right corner opens Settings from anywhere in the app.

Reading the Dashboard

The Dashboard gives you four at-a-glance numbers — Active Orders, Pending Quotes, Inventory Value, and Average Production Yield — followed by a live, searchable table of your most recent orders with their status and due date. It's meant as a starting point, not a full report: click into Sales, Production, or Operations for the complete picture behind any of these numbers.



The Dashboard — KPI cards and the Recent Orders table.

CHAPTER 2

Sales

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

Creating a Sales Order

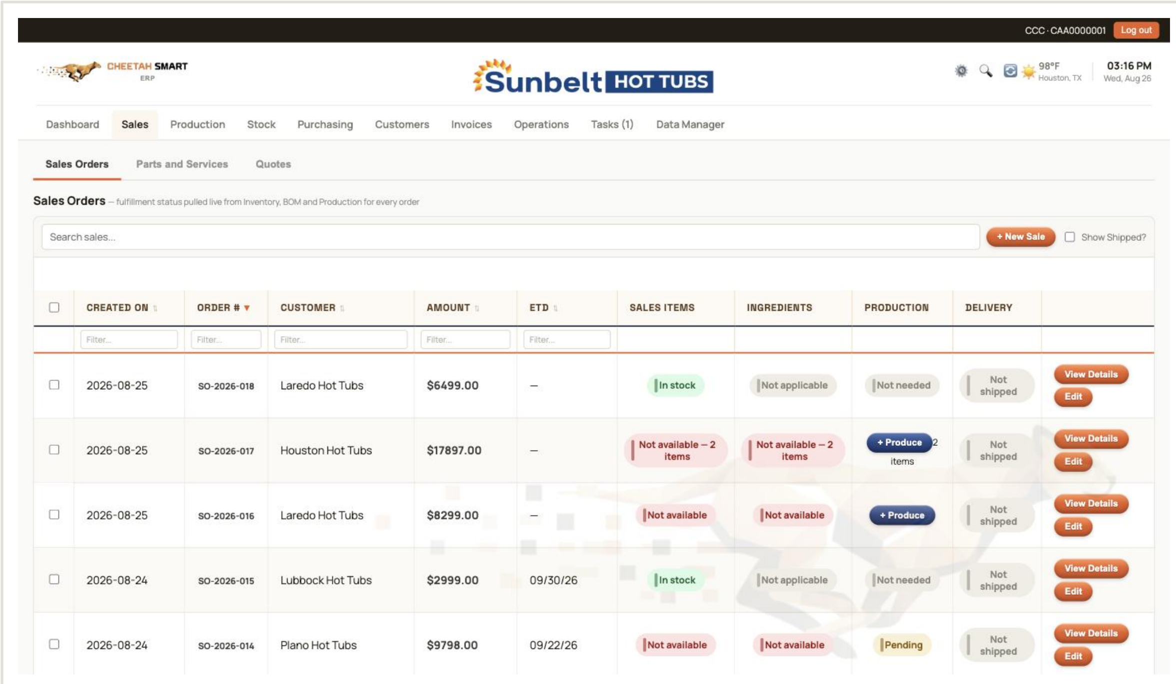
1. Go to **Sales** → **Sales Orders** and click **+ New Order**.
2. Pick the customer using the search-and-select picker, then add one or more line items — a mix of finished products, parts, and services is allowed on the same order.
3. Set quantity, delivery freight terms, and shipping detail for each line, then save.
4. If a line item is a manufactured product and there isn't enough finished stock, Cheetah Smart automatically raises a Manufacturing Order for the shortfall — you don't create that by hand.

Tracking progress

Use the **Show Shipped?** checkbox above the table to bring already-shipped orders back into view when you need to look something up; it's off by default so the table only shows what's still open.

Quotes and Parts & Services

Quotes work the same way as Sales Orders but represent a proposal that hasn't been won yet; check **Show Approved/Cancelled** to see quotes that have already been decided one way or the other. Parts and Services is for sales that skip production entirely — spare parts shipped from stock, or billable service work — and supports the same freight and shipping options as Sales Orders, including drop-ship.



Sales Orders — sortable, filterable, with per-order Cancel and detail view.

CHAPTER 3

Customers

Customers → Customer Master is your address book of who you sell to, along with the commercial terms each one gets.

Adding or editing a customer

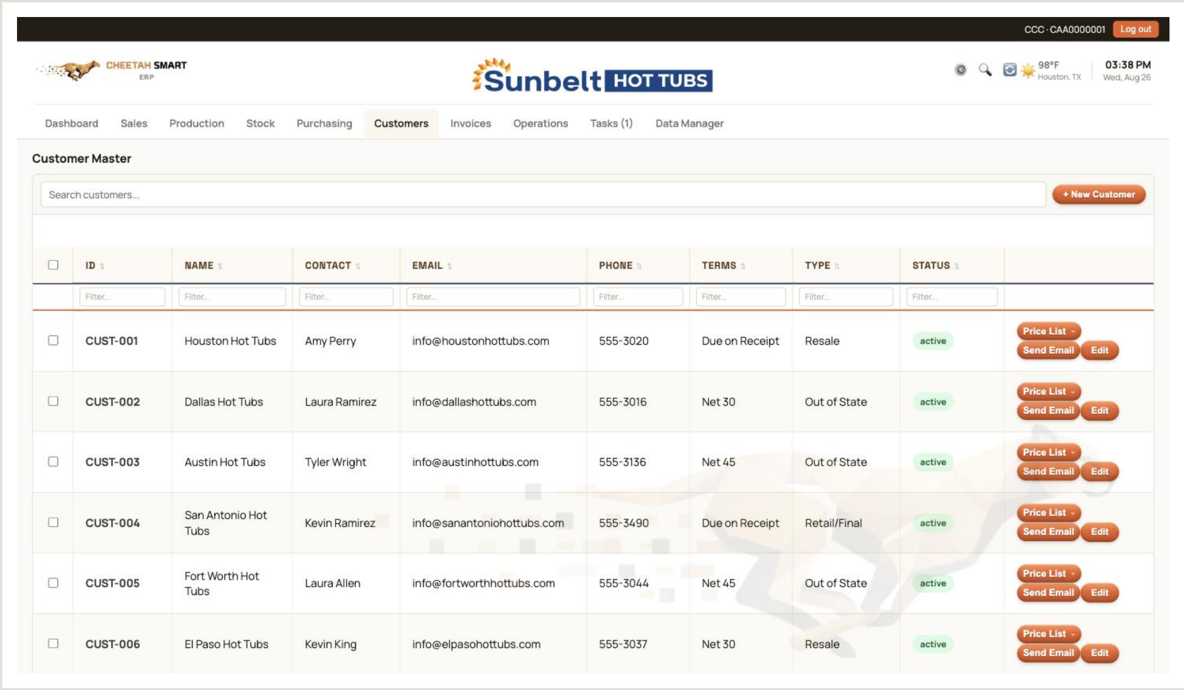
1. Click **+ New Customer**, or **Edit** on an existing row.
2. Fill in the primary contact plus up to two additional contacts, billing and shipping address, payment terms, customer type, and active/inactive status.
3. Save. The customer is now available anywhere you pick a customer — Sales Orders, Quotes, Parts & Services, and Invoices.

Customer Price Lists

Click **Price List** on any customer row to set special regular or volume pricing for that one customer on Sales Orders. When that customer is selected on a new order, their price list is applied automatically instead of the standard list price.

Emailing a customer directly

Every customer row also 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. See Chapter 12 for how sending documents by email works throughout the app.



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

CHAPTER 4

Production

Production has four sub-tabs: **Manufacturing** (Manufacturing Orders), **Production Runs** (build-to-stock runs with no linked sale), **BOM Builder** (define what a Component or Product is made of), and **Hierarchy** (see how components nest inside finished products).

Working a Manufacturing Order

Manufacturing Orders are created automatically from Sales Orders when a product needs to be built — you don't normally create these from scratch. Each one shows the sale it came from, the product and quantity, any linked Purchase Order raised for a material shortfall, status, and estimated completion date.

1. Find the order in **Production** → **Manufacturing** (use the search box or column filters if the list is long).
2. Click **Start** when work begins, or **Stop** to pause it.
3. Click **Complete** once the build is finished — this moves the built quantity into finished-goods stock and generates a serial number if your company has serial numbers turned on (Settings → Production Areas).
4. Use **Print Documents** to generate a Picking List, Stickers, and/or Packing List for the order — check the ones you need and click Print.

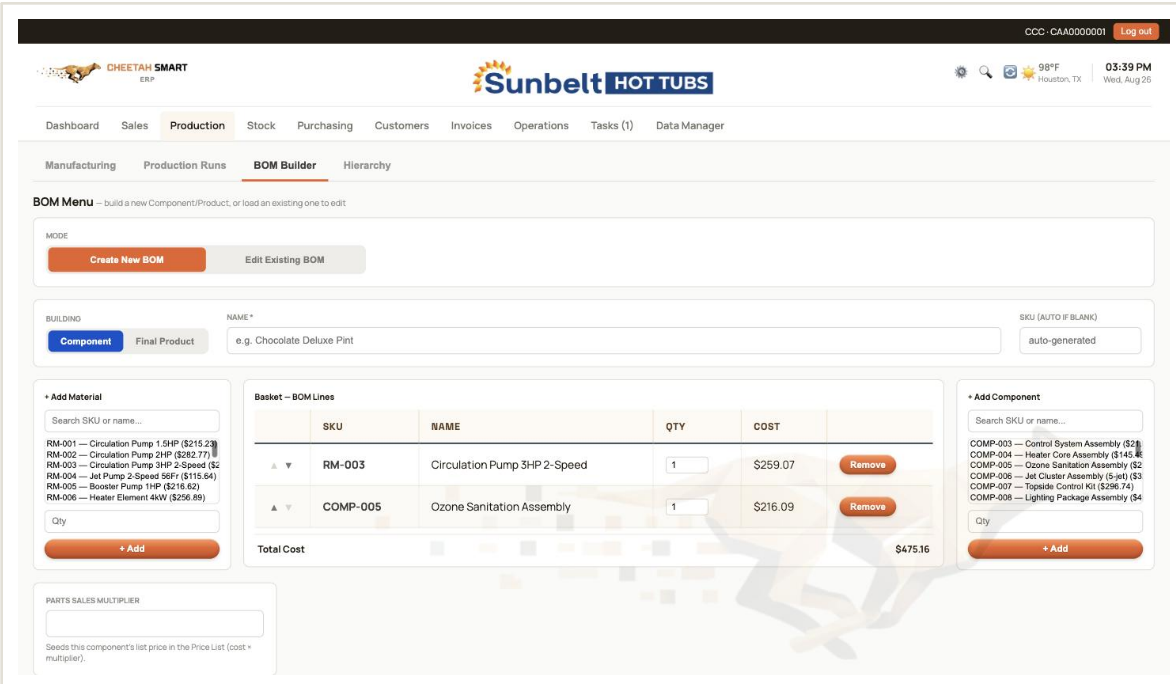
Standalone builds Need to build to stock without a customer order behind it? Use **+ New MO** directly, or use Production Runs for the same purpose — both support the same Print Documents options as an order-linked Manufacturing Order.

BOM Builder — defining what something is made of

A BOM (Bill of Materials) is the recipe for a Component or a Finished Product: which raw materials and/or components go into it, and in what quantity.

1. Go to **Production** → **BOM Builder** and choose **Create New BOM** (or **Edit Existing BOM** to change one that already exists).
2. Choose whether you're building a **Component** or a **Final Product**, then give it a name (SKU auto-generates if you leave it blank).
3. Search and add raw materials from the left picker and/or components from the right picker into the Basket in the middle — adjust quantity per line right in the basket table, and use the up/down arrows to reorder lines.

4 Check the running **Total Cost** at the bottom of the basket, then save.



BOM Builder — search-and-add materials/components into a costed basket.

CHAPTER 5

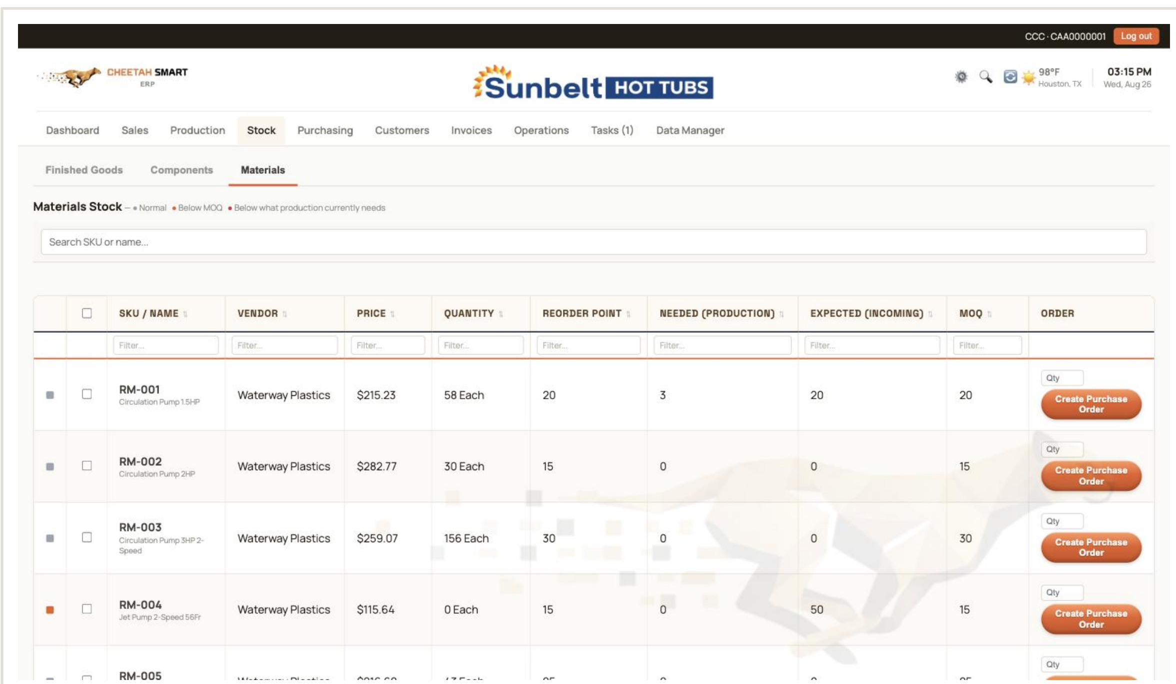
Stock

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

Reading a stock table

All three Stock tables follow the same pattern: on-hand quantity, vendor/price where relevant, reorder point, how much is currently needed for production, incoming quantity already on order, minimum order quantity (MOQ), and a one-click **Create Purchase Order** action right on the row when something needs to be ordered. A colored dot next to 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 / Finished Goods) and use the search box or column filters to find an item.
2. Check the **Needed (Production)** and **Expected (Incoming)** columns to see whether what's on hand plus what's already inbound will cover upcoming demand.
3. If not, enter a quantity and click **Create Purchase Order** right from the row.



Materials Stock — unified view of on-hand, needed, incoming, and MOQ.

CHAPTER 6

Purchasing

Purchasing covers everything you buy from outside vendors, across four sub-tabs: **Purchase Orders** (which opens on Reorder Suggestions), **Service Orders**, **Vendors**, and **Components / Materials**.

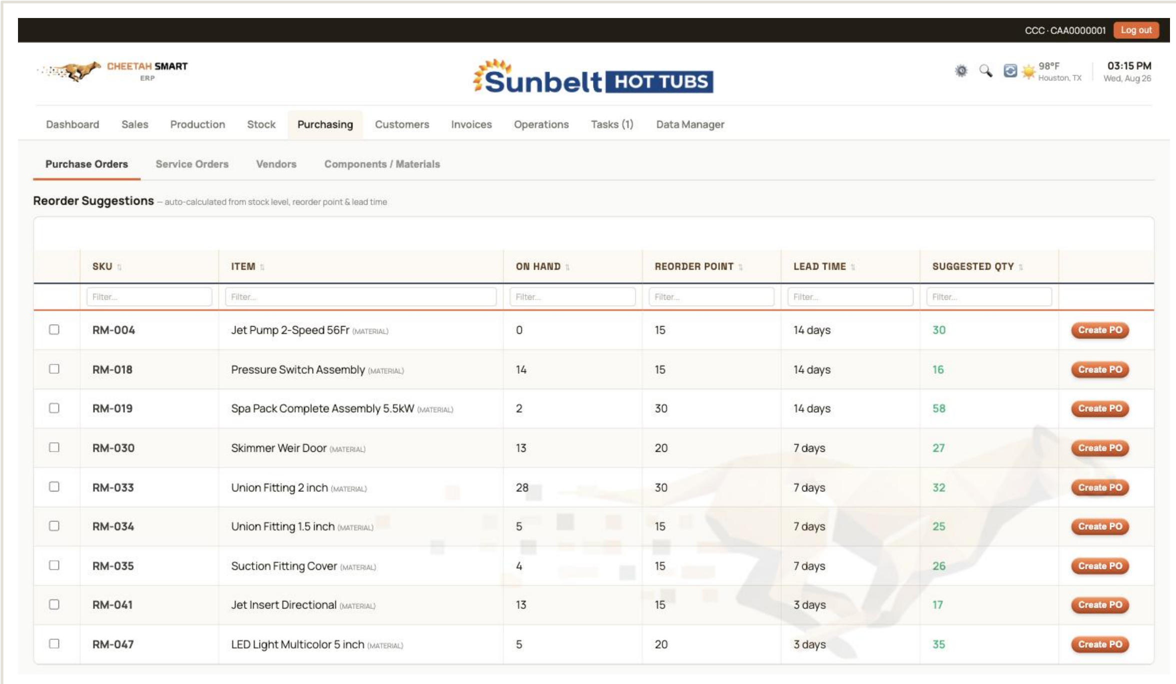
Reorder Suggestions → creating a Purchase Order

Reorder Suggestions is calculated automatically from current stock level, each item's reorder point, and its vendor lead time — it's the fastest way to see what needs ordering today without checking every stock screen by hand.

1. Open **Purchasing** → **Purchase Orders** — Reorder Suggestions is the default view.
2. Review the **Suggested Qty** column, adjust if you want to order a different amount, and click **Create PO** on any row (or select several rows and act on them together).
3. On the Purchase Order itself, record the order date; the Ship-To defaults to your own warehouse but can be changed for a drop-ship order tied to a specific Sales/Parts Order.
4. When the shipment arrives, check **Show Received?** is on if needed and mark the PO received and, separately, mark it paid once you've settled the vendor invoice.

Vendors and Service Orders

Vendors holds each supplier's contact info and terms, the same way Customer Master does for customers. Service Orders is the purchasing-side equivalent for outside services you buy (rather than physical materials) — subcontracted work, for example.



Reorder Suggestions — auto-calculated from stock, reorder point, and lead time.

CHAPTER 7

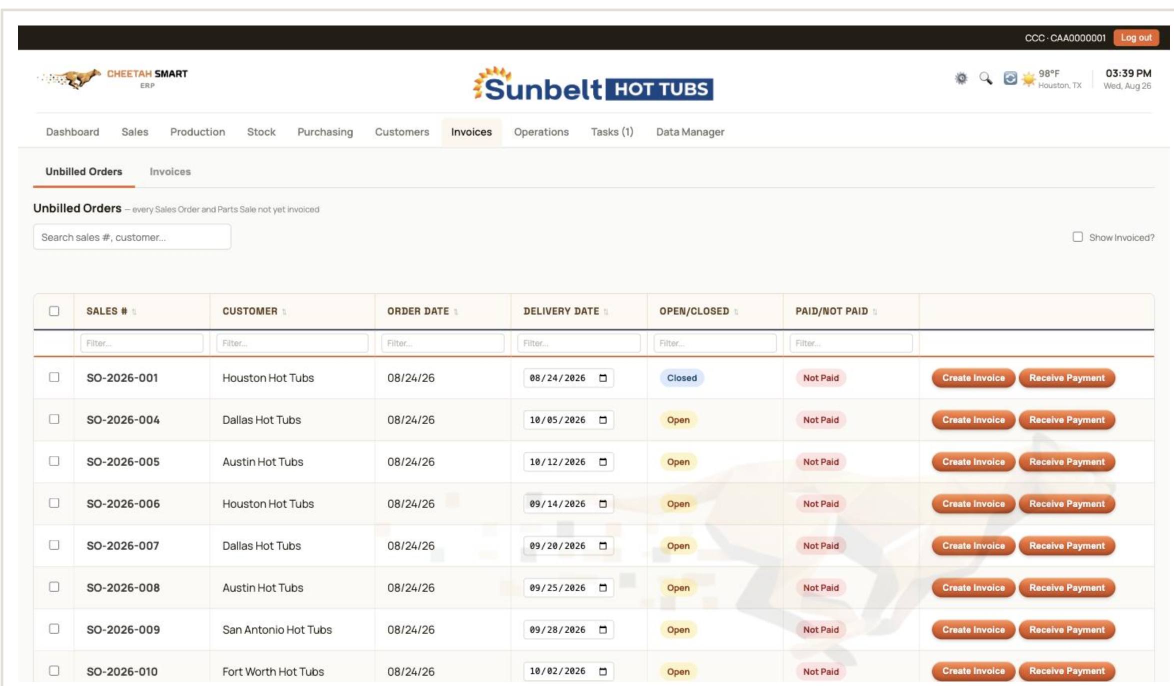
Invoices & Payments

The Invoices menu has two sub-tabs: **Unbilled Orders** (every Sales Order and Parts Sale that hasn't been invoiced yet) and **Invoices** (invoices you've already created, with payment status).

Creating an invoice and receiving payment

1. Open **Invoices** → **Unbilled Orders** to see every open, not-yet-invoiced order.
2. Click **Create Invoice** on a single order, or select several with the checkboxes and invoice them together in one bulk action.
3. Once payment comes in, find the invoice under the **Invoices** sub-tab and click **Receive Payment** — partial payments are supported, and the invoice tracks the running paid/unpaid balance automatically.
4. Use **Show Invoiced?** on Unbilled Orders if you need to double back and check something that's already been billed.

> **How cost is calculated** Cheetah Smart values cost of goods sold using either FIFO or LIFO layer costing on real purchase history — see Chapter 8 for where to view and switch between the two.



Unbilled Orders — every open Sales Order/Parts Sale, ready to invoice.

CHAPTER 8

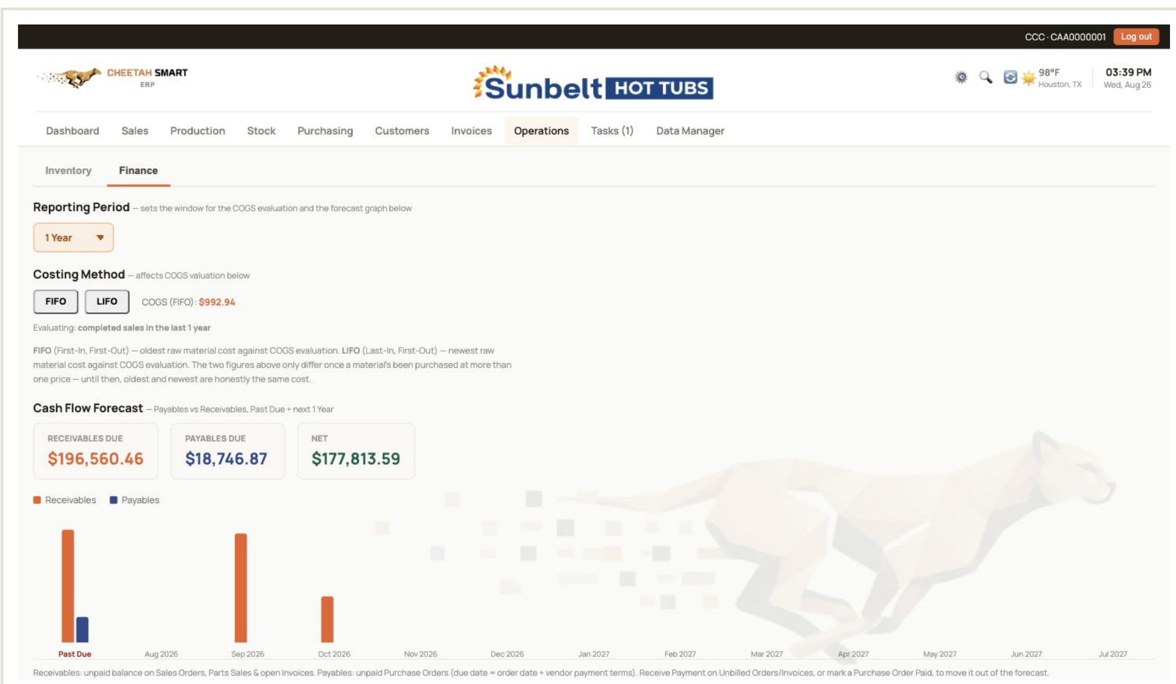
Operations

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

Finance: costing method and cash flow forecast

1. Open **Operations** → **Finance** and set the **Reporting Period** (the window used for both the COGS evaluation and the forecast graph below it).
2. Choose **FIFO** or **LIFO** as your costing method — the two only differ once a material has been purchased at more than one price; until then they show the same number.
3. Review **Receivables Due**, **Payables Due**, and **Net** just below, then the chart underneath for how that breaks down over time, including anything already past due.

Receivables are the unpaid balance on Sales Orders, Parts Sales, and open Invoices; Payables are unpaid Purchase Orders due on order date plus vendor payment terms. Receiving payment on an invoice, or marking a Purchase Order paid, moves it out of the forecast immediately.



Operations → Finance — FIFO/LIFO costing and the Cash Flow Forecast.

CHAPTER 9

Tasks

Tasks is a lightweight, shared to-do list inside the ERP — useful 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 next to Tasks in the main menu shows how many are currently open.

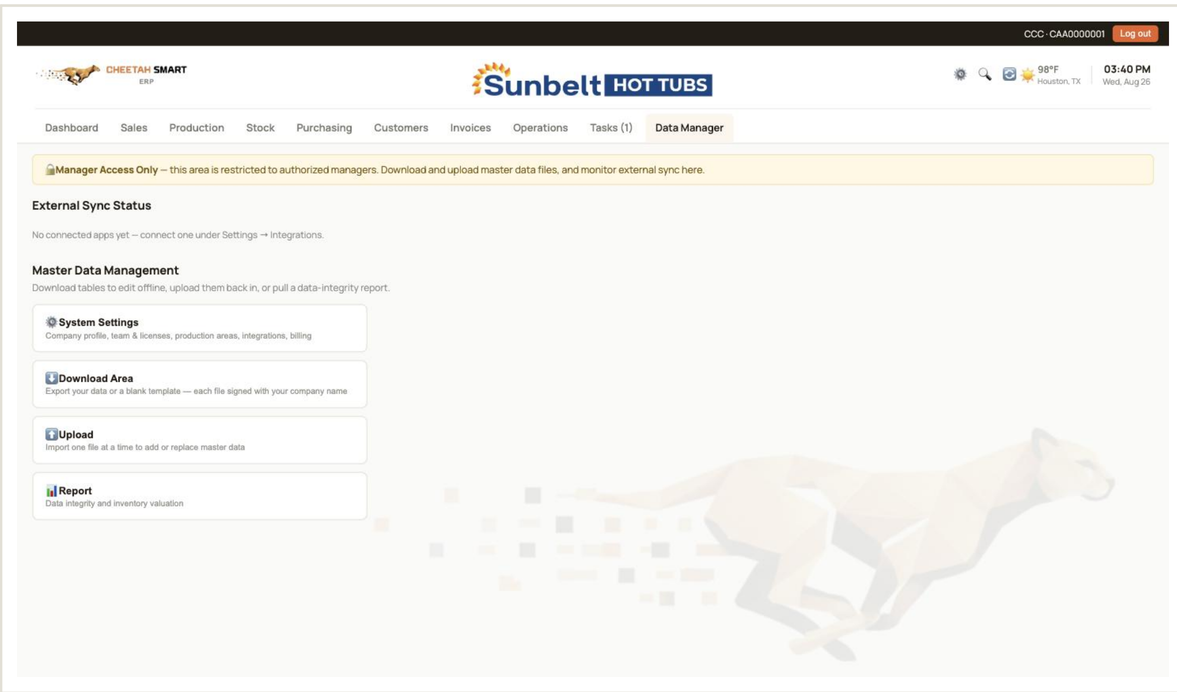
1. Open **Tasks** from the main menu.
2. Use **+ New Task** to add one, with a description and any other fields your team uses.
3. Use the column filters to find a specific task, and mark it done when it's complete.

CHAPTER 10

Data Manager

Data Manager is manager-access-only and is where you work with master data in bulk, and check on any external integrations.

1. **Download Area** — export your current data, or a blank template, for any master table; each exported file is signed with your company name.
2. **Upload** — import one file at a time to add new records or replace existing master data in bulk, rather than entering rows one by one in the UI.
3. **Report** — run a data-integrity and inventory-valuation report to catch issues before they cause problems downstream.
4. **External Sync Status** — shows any apps you've connected under Settings → Integrations; if nothing is connected yet, it will say so here.



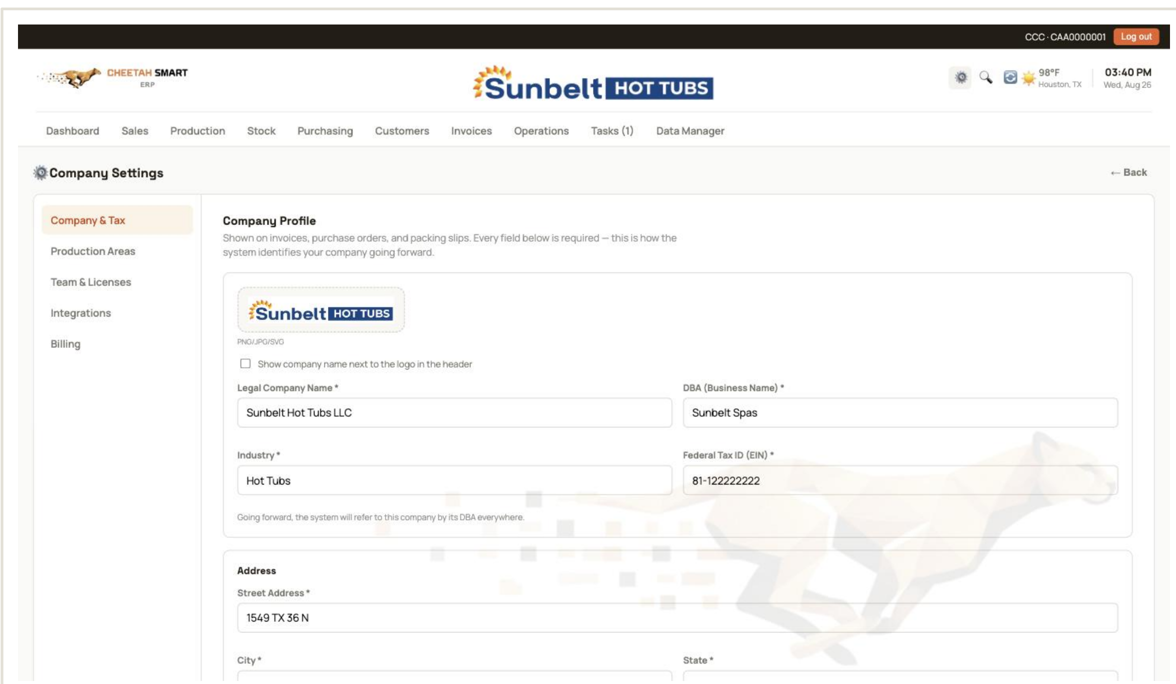
Data Manager — bulk download/upload of master data and integrity reporting.

CHAPTER 11

Settings

Click the gear icon in the top-right corner from anywhere in the app to open Settings. It's organized into five areas down the left side.

1. **Company & Tax** — your logo, legal company name, DBA/business name, industry, Federal Tax ID, and address. This is what prints on every invoice, purchase order, and packing slip.
2. **Production Areas** — configure serial numbers (fixed text and/or an auto-incrementing counter) generated automatically when a Manufacturing Order is completed.
3. **Team & Licenses** — manage who on your team has a login and how many seats your plan includes.
4. **Integrations** — connect external apps; anything connected here shows up on the Data Manager's External Sync Status panel.
5. **Billing** — your plan, seat count, and payment method on file.



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

CHAPTER 12

Documents, Printing & Email

Anywhere Cheetah Smart generates a document — an Invoice, Purchase Order, Picking List, Stickers, or Packing List — the same Print/Export and Send Email pattern is available.

1. Click **Print / Export** (or, on a Manufacturing Order/Production Run, **Print Documents**) to open the document options for that record.
2. Choose the document(s) you need and click **Print** to open a print-ready view, or **Download PDF** to save a real PDF file.
3. Click **Send Email** to prepare the same document as an email — Cheetah Smart builds a real PDF attachment and hands it to your device's normal share/mail flow (or downloads the PDF and opens a pre-filled email draft as a fallback), so it goes out through your own email address, not a generic system address.

Where Send Email shows up

Look for it on Customer and Vendor rows, on Invoices and Purchase Orders, on the Parts Price List, and inside every Print/Export and Print Documents menu.

CHAPTER 13

Getting Help

If you get stuck, start with the FAQ — it's searchable and covers the questions people ask most in their first weeks on Cheetah Smart.

Visit **cheetah-smart.com/faq** and use the search bar to jump straight to a topic, or browse the most common questions listed there. For anything the FAQ doesn't cover, reach out to **cheetah-mail@cheetah-smart.com** — we're here to cheetah-serve you.