



Platform User Guide (also accessible through the
help button in navigation bar)

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Creating a Supply Chain

1. Click the **Supply Chain** tab

Cleanwater Fishery

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Navigation

- Products
- Supply Chain**
- Inventory
- Sales Channel
- Orders

Supply Chains

Create Supply Chain

#	Name	Date Created	
1	The Supply Chain	3/30/16 8:56 AM	View/Edit
2	Cleanwater Supply Chain	3/27/16 10:22 PM	View/Edit
3	Cleanwater Supply Chain	4/8/16 5:38 PM	View/Edit

2. Click the **Create Supply Chain** button and give it a name

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Home Help Logout

Navigation

- Products
- Supply Chain**
- Inventory
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- Orders

Supply Chains

Name of Supply Chain

ex. Joseph's Supply Chain

Maximum 30 characters.

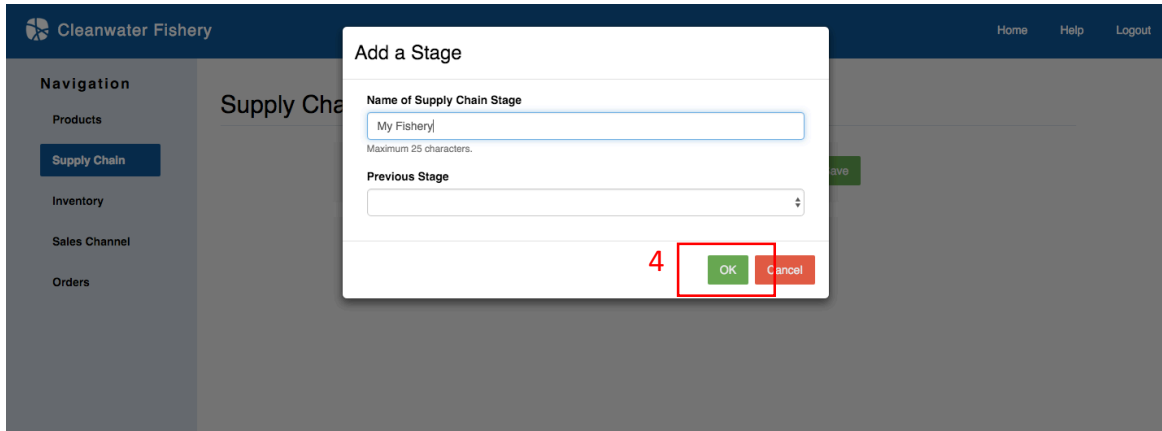
[Submit](#)

3. Click the **Add** button to add the first intermediary in your supply chain

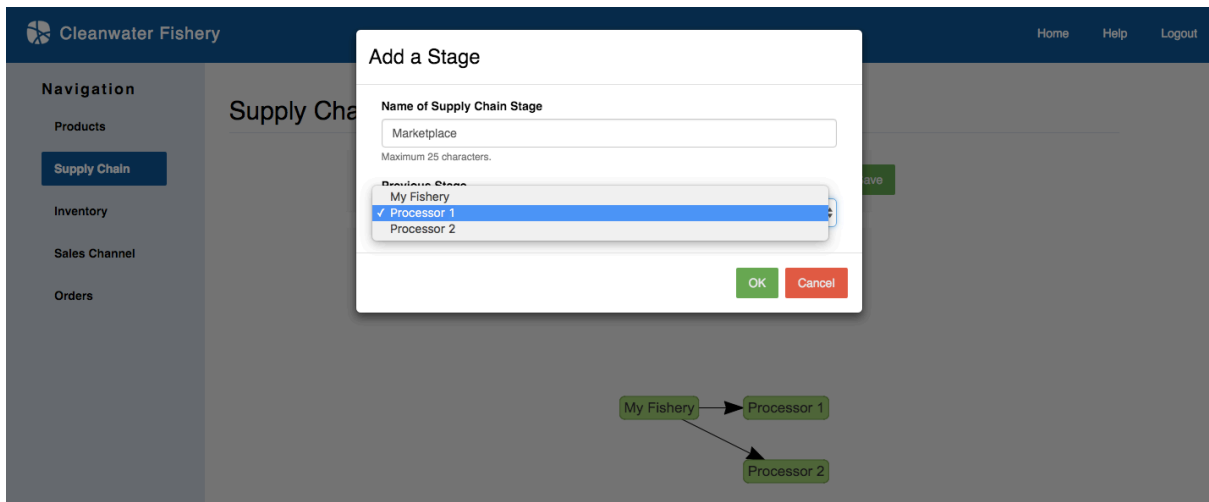
3 [Add](#) [Edit](#) [Delete](#) [Link](#) [Unlink](#) [Save](#)

[CONTINUED ON NEXT PAGE]

4. Name your first intermediary, and press the green **OK** button

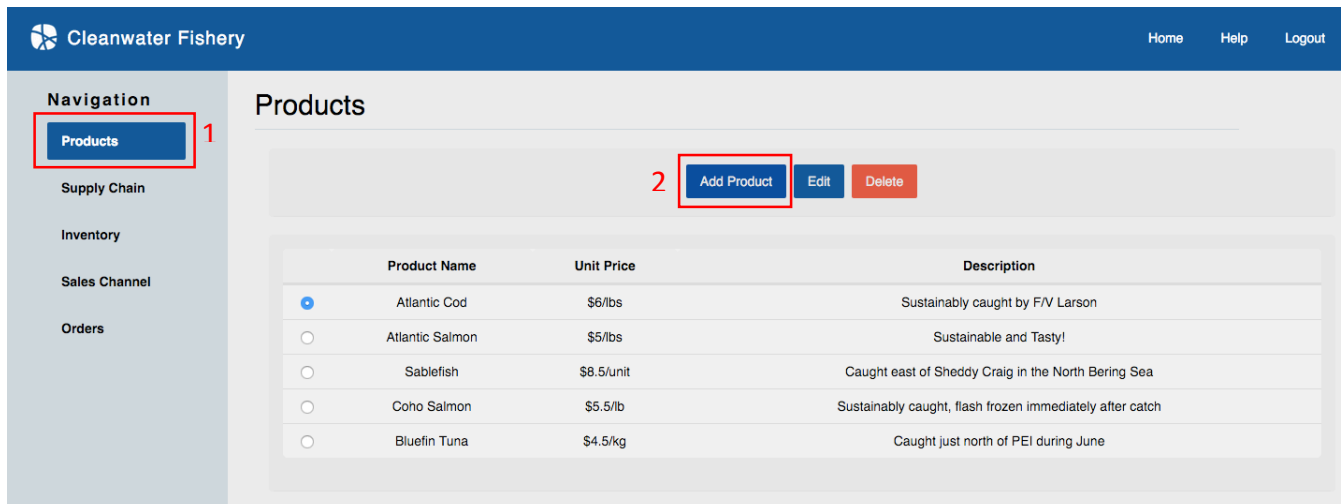


5. Repeat steps (3) and (4), and connect intermediaries by using the **Previous Stage** Dropdown



Adding a Product

1. Click the **Products** tab

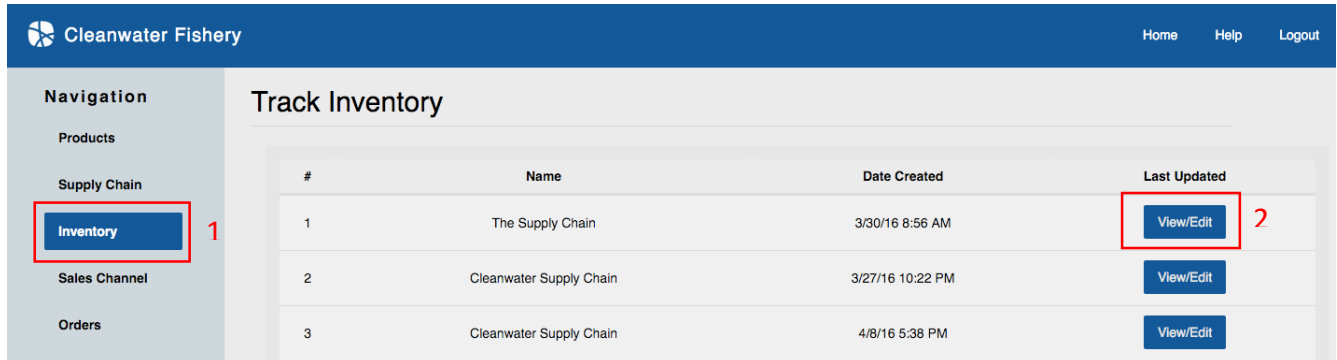


2. Click the **Add Product** button
3. Fill out the info & Click **Submit**

The screenshot shows the 'Add a Product' form. It contains several input fields: 'Product Name' (with example 'ex. Atlantic Cod' and a note 'Maximum 25 characters.'), 'Unit Price' (with example 'ex. 4.50' and a note 'Enter in \$XX.xx format'), 'Units' (a dropdown menu), 'Attach Product Photo' (with a 'Choose File' button and a note 'PNG and JPG files ONLY!'), and 'Description' (with a placeholder 'Enter a short product description' and a note 'Maximum 45 characters'). At the bottom right, the 'Submit' button is highlighted with a red box and the number '3', next to a 'Cancel' button.

Adding an Inventory Batch

1. Click the **Inventory** tab
2. Choose your desired supply chain by clicking **View/Edit**



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Home Help Logout

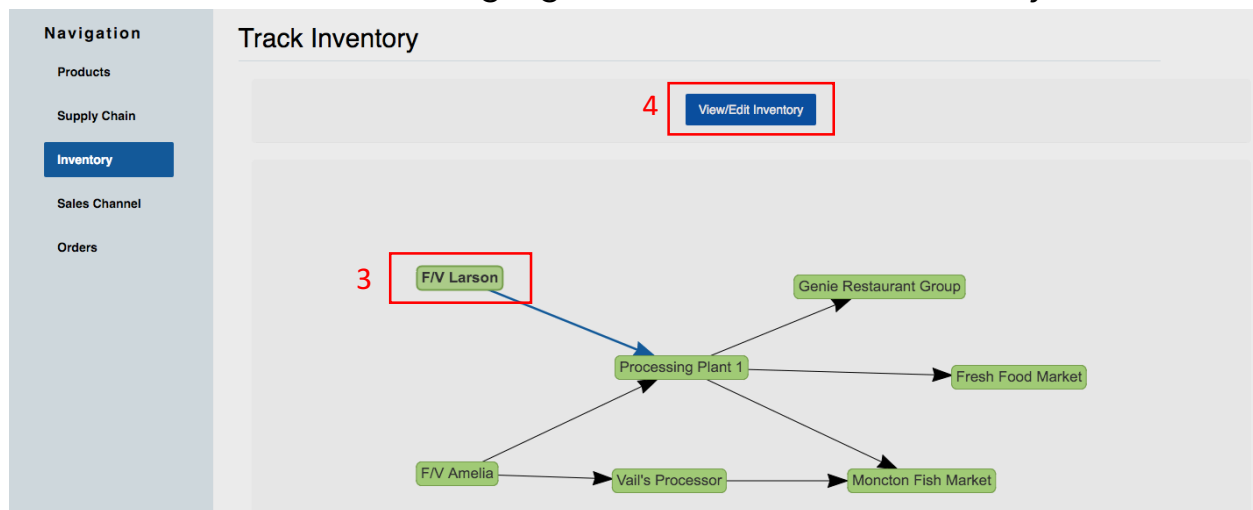
Navigation

- Products
- Supply Chain
- Inventory**
- Sales Channel
- Orders

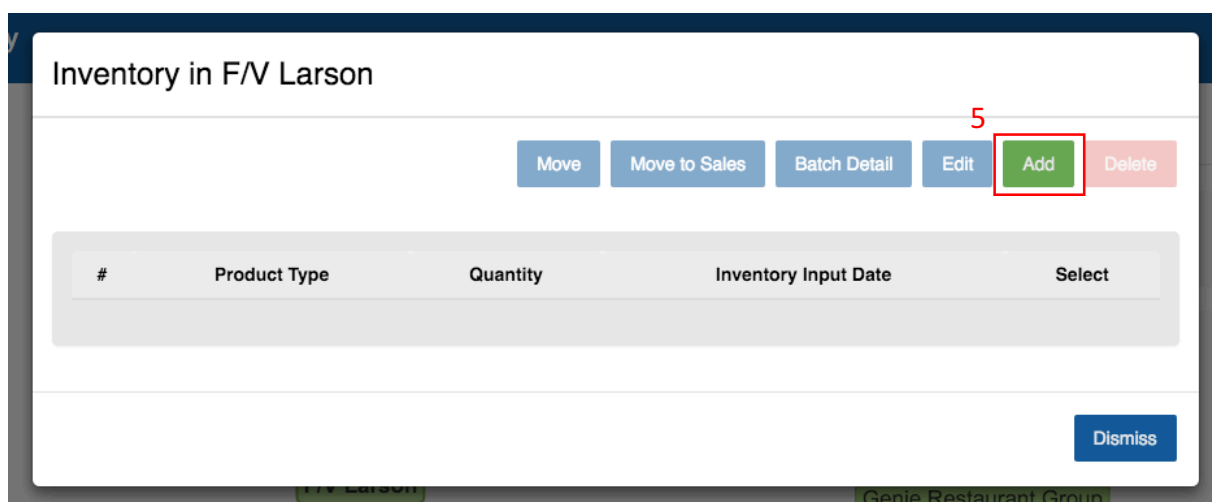
Track Inventory

#	Name	Date Created	Last Updated
1	The Supply Chain	3/30/16 8:56 AM	View/Edit
2	Cleanwater Supply Chain	3/27/16 10:22 PM	View/Edit
3	Cleanwater Supply Chain	4/8/16 5:38 PM	View/Edit

3. From the visual supply chain, click the intermediary you'd like to add the batch to
4. Once the destination is highlighted, click **View/Edit Inventory**



5. Click the **Add** button



Inventory in F/V Larson

Move Move to Sales Batch Detail **Edit** **Add** Delete

#	Product Type	Quantity	Inventory Input Date	Select
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Dismiss

6. Fill out the info & Click **OK**

Add Seafood Batch

Product Type <div>Bluefin Tuna</div> <p>Item must be added under Products tab.</p>	Quantity <div>ex. 4000</div> <p>Please enter a numerical value.</p>
Units <div></div> <p>Please choose between the three options.</p>	Catch Date <div>yyyy-mm-dd</div> <p>MM/DD/YYYY</p>
Catch Region <div>ex. Gulf of St. Lawrence</div> <p>Enter the Catch Location</p>	Caught By <div>ex. Joey Fisher</div> <p>Enter in the fisherman/fishery</p>
Catch Type <div>ex. Gillnetting</div> <p>Enter the method of catching.</p>	Water Depth (Meters) <div>ex. 500</div> <p>Enter the water depth in meters.</p>

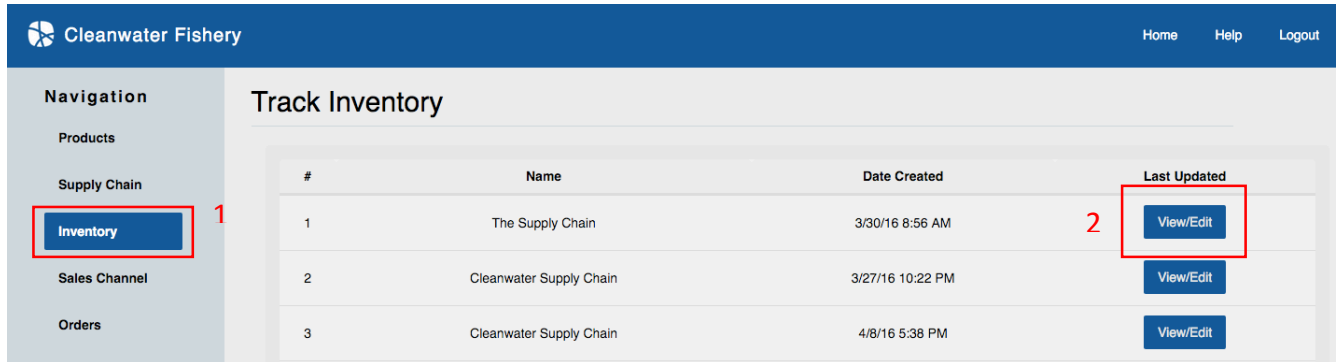
6

OK

Cancel

Moving Your Inventory

1. Click the **Inventory** tab
2. Choose your desired supply chain by clicking **View/Edit**



Cleanwater Fishery

Home Help Logout

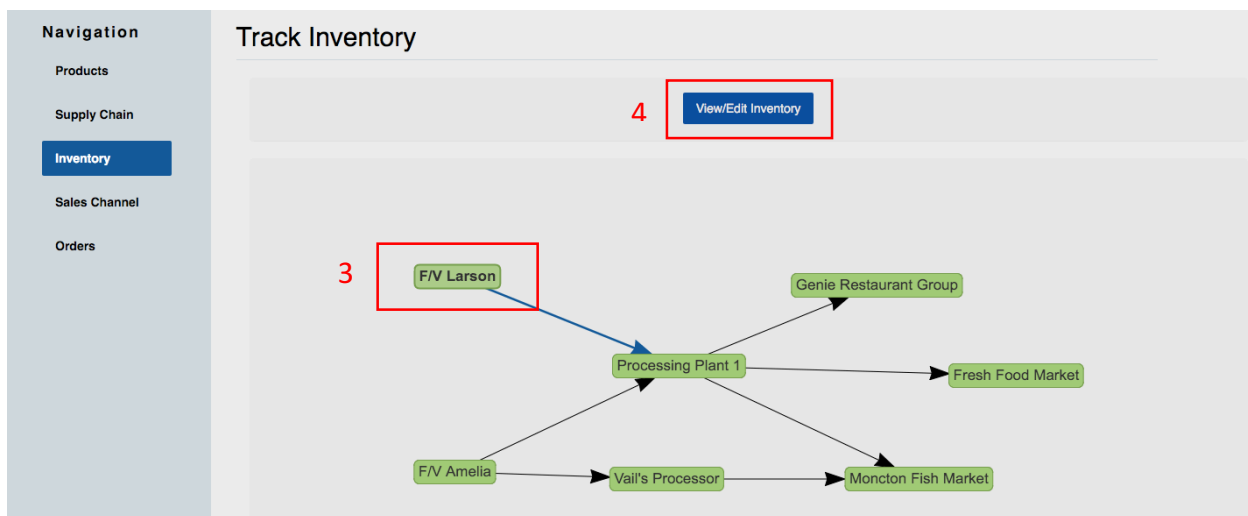
Navigation

- Products
- Supply Chain
- Inventory**
- Sales Channel
- Orders

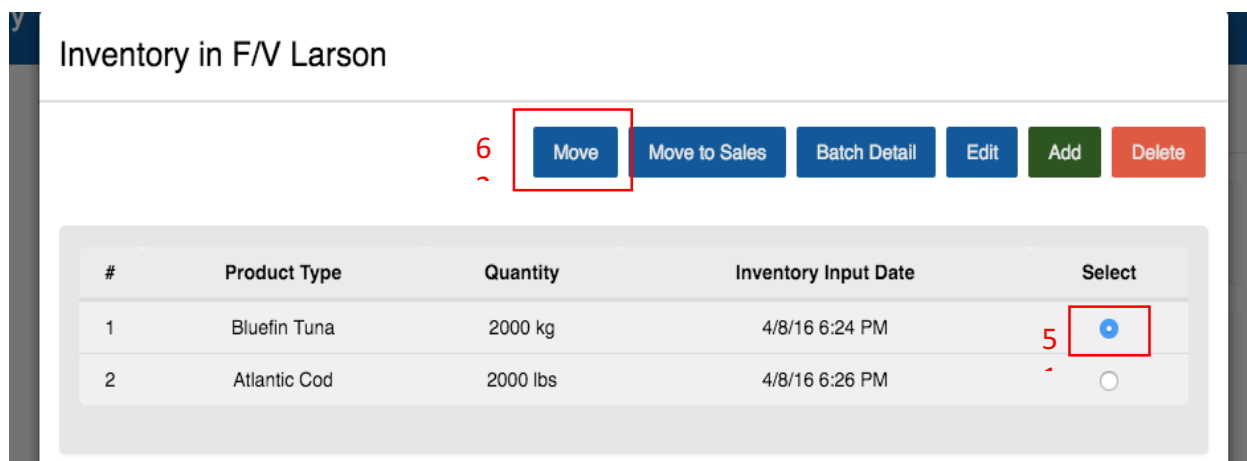
Track Inventory

#	Name	Date Created	Last Updated
1	The Supply Chain	3/30/16 8:56 AM	View/Edit
2	Cleanwater Supply Chain	3/27/16 10:22 PM	View/Edit
3	Cleanwater Supply Chain	4/8/16 5:38 PM	View/Edit

3. From the visual supply chain, click the intermediary that inventory is being moved from
4. Once the target intermediary is highlighted, click **View/Edit Inventory**



5. Click the inventory batch you wish to move



Inventory in F/V Larson

6 **Move** Move to Sales Batch Detail Edit Add Delete

#	Product Type	Quantity	Inventory Input Date	Select
1	Bluefin Tuna	2000 kg	4/8/16 6:24 PM	Select
2	Atlantic Cod	2000 lbs	4/8/16 6:26 PM	

6. Click the **Move** button
7. From the **Move to Stage** dropdown, choose the intermediary that inventory is being moved to

The screenshot shows a 'Move Inventory Batch' dialog box overlaid on a background interface. The dialog box has a title bar and contains the following elements:

- Choose how much inventory to move:** A text input field containing the value '500'. Below the field, a status message reads: '500 kg remaining of 1000 kg in chosen stage.'
- Moving chosen inventory batch to:** A dropdown menu with a list of options. The options are: 'F/V Larson', 'F/V Amelia', 'Processing Plant 1' (which is highlighted with a blue selection bar), 'Vail's Processor', 'Moncton Fish Market', 'Genie Restaurant Group', and 'Fresh Food Market'.
- Buttons:** On the right side of the dialog, there are 'Add' and 'Delete' buttons. At the bottom right, there is a 'Dismiss' button.

The background interface, which is partially obscured, shows a table with columns labeled '#', 'P', and 'Z'. It also features a 'Select' section with radio buttons and a 'Dismiss' button at the bottom right.

8. Click the **OK** button

Creating a Selling Point

1. Click the **Sales Channels** tab
2. Click **Add Sales Channel**

Cleanwater Fishery

Home Help Logout

Navigation

- Products
- Supply Chain
- Inventory
- Sales Channel**
- Orders

Sales Channels

2 Add Sales Channel Edit Sales Channel View Inventory in Sales

#	Name	Date Created	Channel Type	Select
1	E-commerce	3/27/16 10:40 PM		<input checked="" type="radio"/>
2	Jeffrey's Restaurant	3/27/16 10:40 PM		<input type="radio"/>
3	John's Fish Store	3/27/16 10:40 PM		<input type="radio"/>
4	Transatlantic Store	3/27/16 10:41 PM		<input type="radio"/>
5	Boudreau Restaurant Group	3/27/16 10:46 PM		<input type="radio"/>
6	Moncton Fish Market	3/27/16 10:46 PM		<input type="radio"/>

3. Enter your desired Selling Point Name

[OPTIONAL]: Check **Sell on e-commerce** to upload product to Coastline Market Shop

Add a Selling Point

Name

Maximum 40 characters.

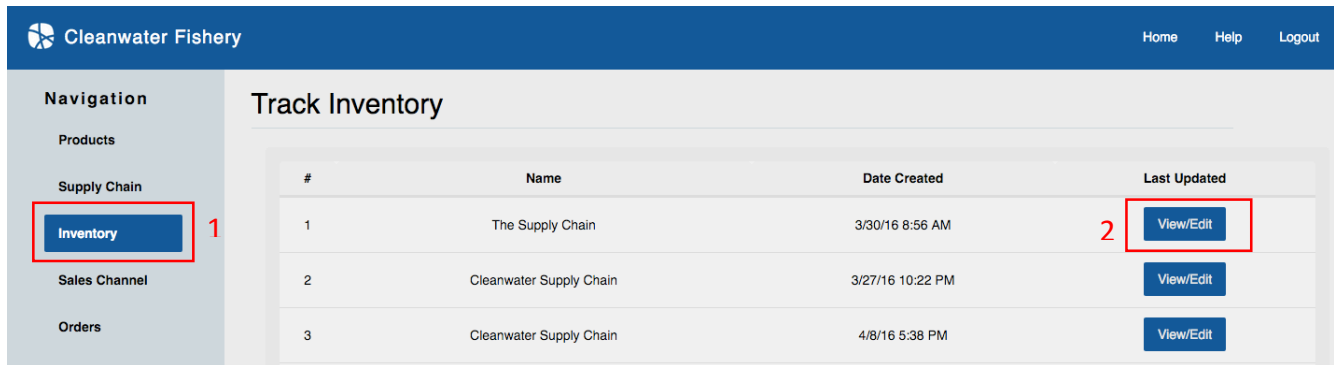
☐ Sell on e-commerce

OK Cancel

4. Click the **Ok** button

Traceability from Catch to Consumer

1. Click the **Inventory** tab
2. Choose your desired supply chain by clicking **View/Edit**



Cleanwater Fishery

Home Help Logout

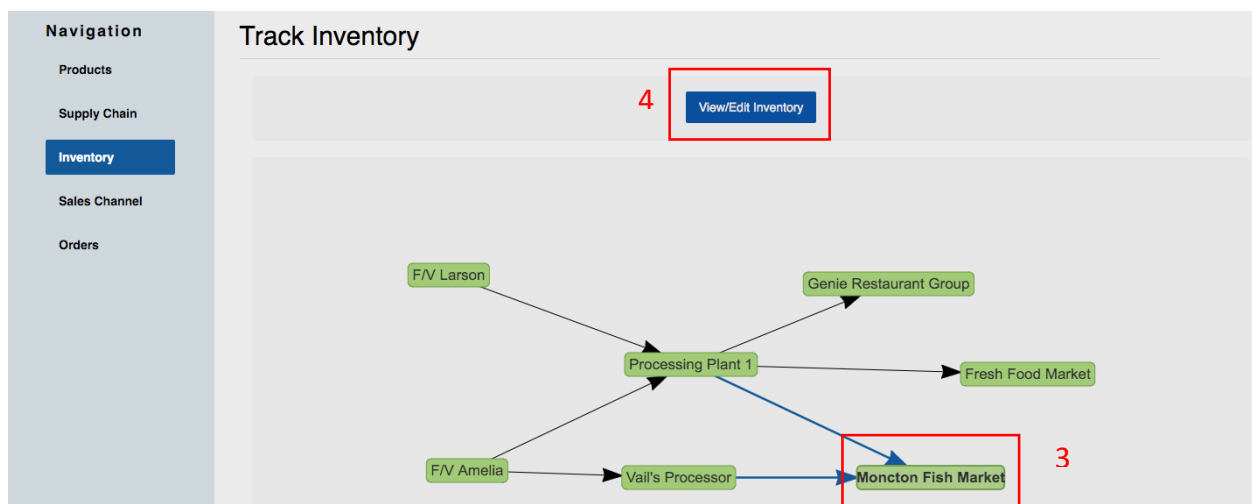
Navigation

- Products
- Supply Chain
- Inventory** (1)
- Sales Channel
- Orders

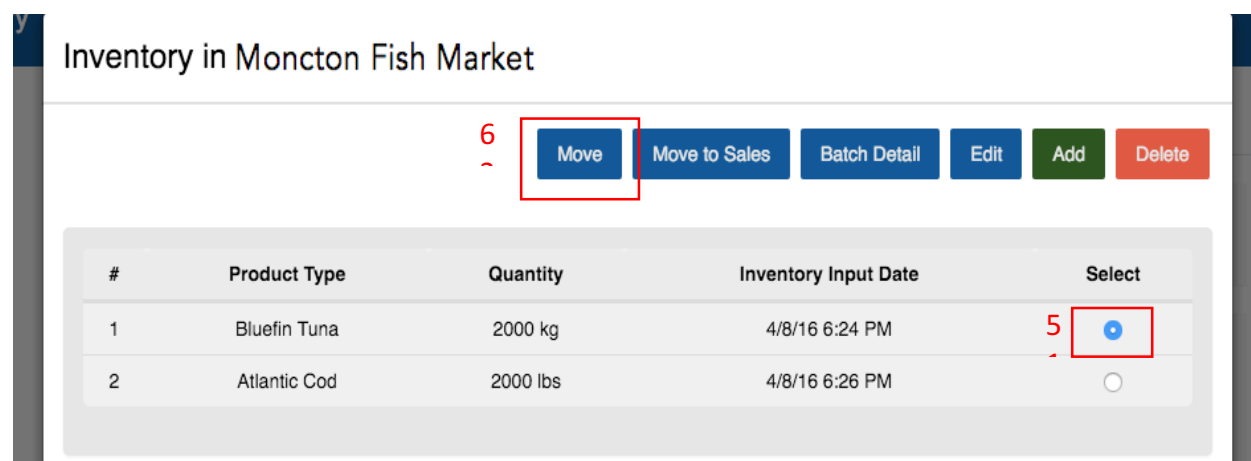
Track Inventory

#	Name	Date Created	Last Updated
1	The Supply Chain	3/30/16 8:56 AM	View/Edit (2)
2	Cleanwater Supply Chain	3/27/16 10:22 PM	View/Edit
3	Cleanwater Supply Chain	4/8/16 5:38 PM	View/Edit

3. From the visual supply chain, click the desired inventory source to track
4. Once the destination is highlighted, click **View/Edit Inventory**



5. Click the inventory batch you wish to track



Inventory in Moncton Fish Market

Move (6) Move to Sales Batch Detail Edit Add Delete

#	Product Type	Quantity	Inventory Input Date	Select
1	Bluefin Tuna	2000 kg	4/8/16 6:24 PM	Select (5)
2	Atlantic Cod	2000 lbs	4/8/16 6:26 PM	<input type="radio"/>

6. Click the **Batch Detail** button
7. The new window will display the historical data of the fish, along with its catcher and origin

Inventory Batch Details

Initial Catch Audit

Product Type	Quantity	Catch Date	Catch Region	Caught By	Catch Type	Water Depth
Bluefin Tuna	1000 kg	4/22/2016	Gulf of St. Lawrence	Joey Fisher	Gillnetting	500

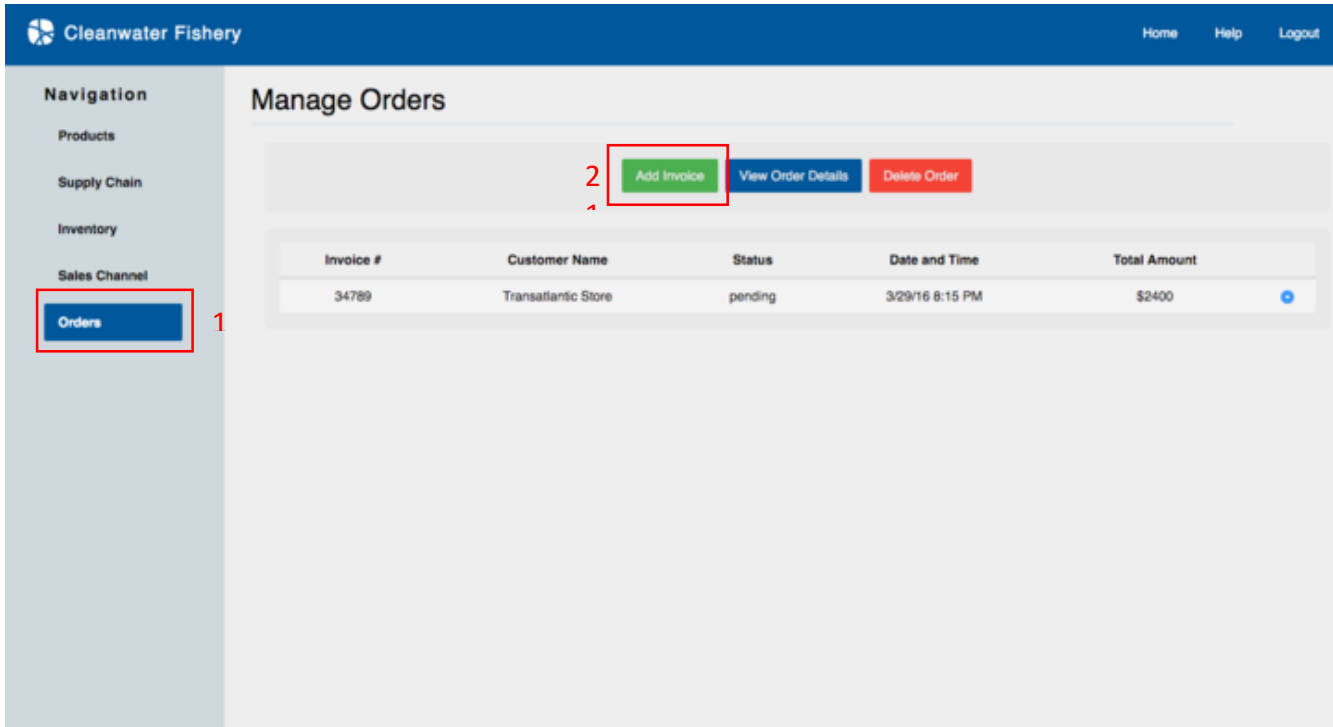
Lot History

Operation	Date	Location	Quantity
move	2016-04-08	Moncton Fish Market	2000 kg
split			
split			
create	2016-04-08	F/V Larson	1000 kg

Close

Order and Invoice Generation

1. Click the **Orders** tab
2. Click **Add Invoice**



3. From Add Order, enter all relevant fields and click **submit**

Customer Name: John Doe (Maximum 30 characters)

Email: hello@coastlinemarket.com (Please enter a valid email)

Invoice Number: 49784 (Maximum 16 characters)

Payment Method: Credit (Choose from the dropdown list)

Status: Pending (Choose from the dropdown list)

Date: 2016-04-10 (Press the triangle for the date widget)

Credit Terms (in Days): 12 (Enter the invoice terms)

Phone Number: 1111111111 (No spaces or dashes)

Product	Batch (M/D/Y)	Unit Price	Units	Quantity (Max: 1000kg)
Bluefin Tun.	2016-04-22, Moncton Fish	8.50	lbs	1000

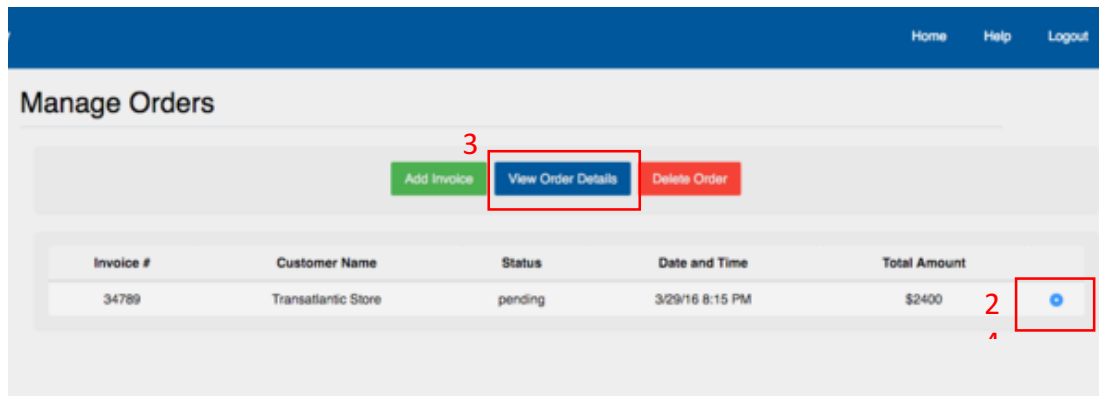
Total: \$0

Submit Cancel

4. (All transactions through the e-commerce platform will automatically create an invoice)

Exporting invoices

1. Click the **Orders** tab
2. Select the order invoice you would like to export to PDF or excel



3. Click **View Order Details**
4. Click **Export to PDF** or **Export to Excel** to download the invoice to your computer

