

# USER MANUAL



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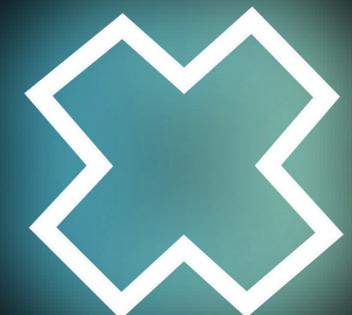
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01

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# HELLO! IN THIS MANUAL WE ARE GOING TO EXPLAIN THE INSTRUCTIONS TO KNOW HOW TO USE THIS PROGRAM



**FIRST OF ALL YOU HAVE TO INITIALIZE THE PROGRAM WITH MAIN.PY**

## LOGIN STEPS:

Write your **User** in the first box

ERP Sales System - Login

Username:

Enter User

Password:

Enter Password

Login

Write your **password** in the second box below

Finally, click the **"Login" button** to enter the program



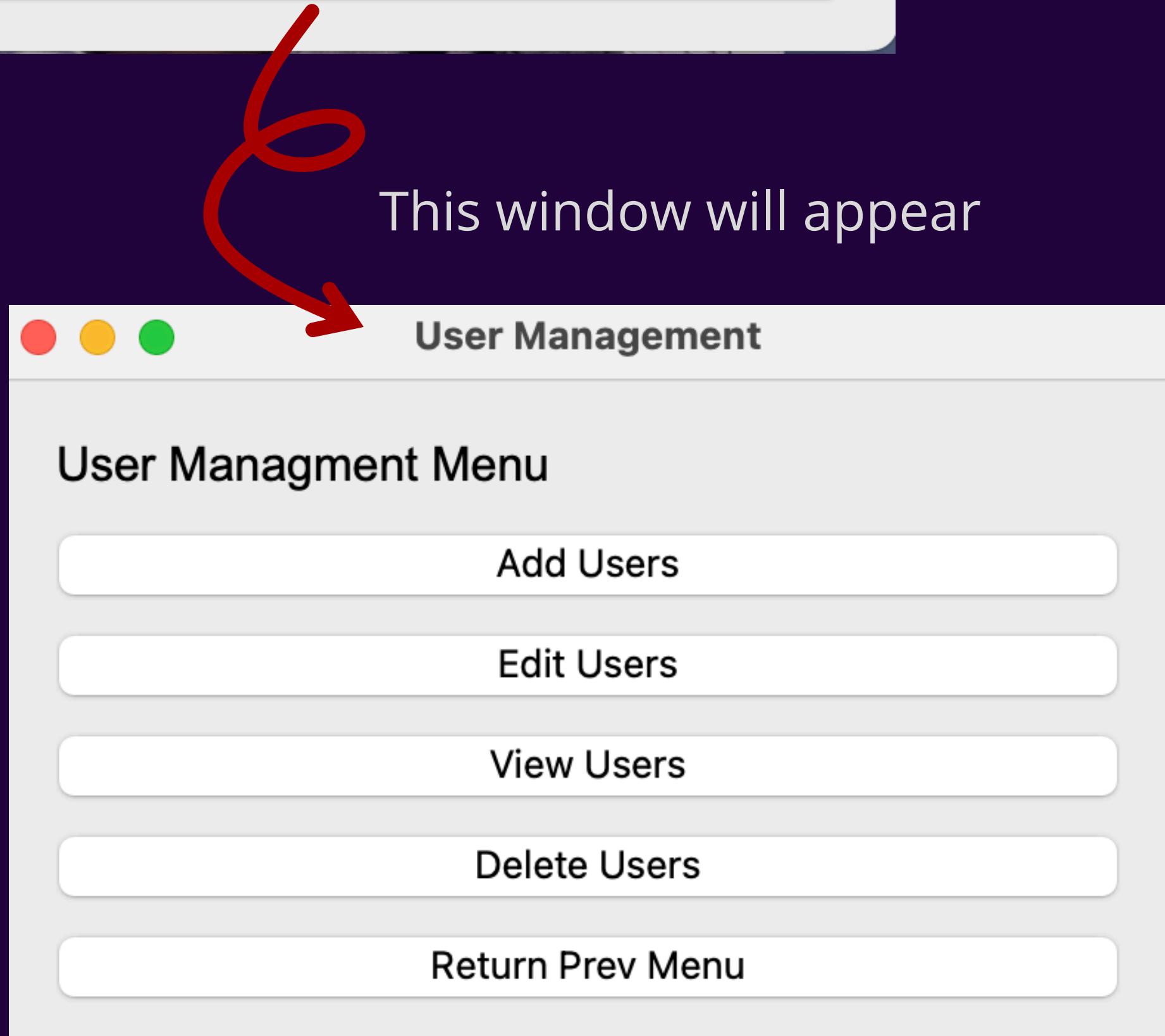
**NOTE:** if the username or password is incorrect, the login will be unsuccessful and you will have to try again.

# MAIN ADMIN MENU:

If you are an Admin: once you have logged in with your username and password, this window will appear



Click the first button  
for **User  
Management**

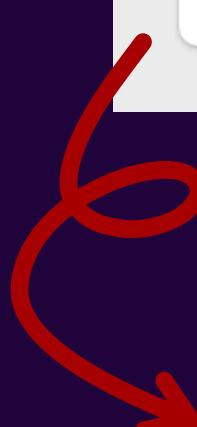
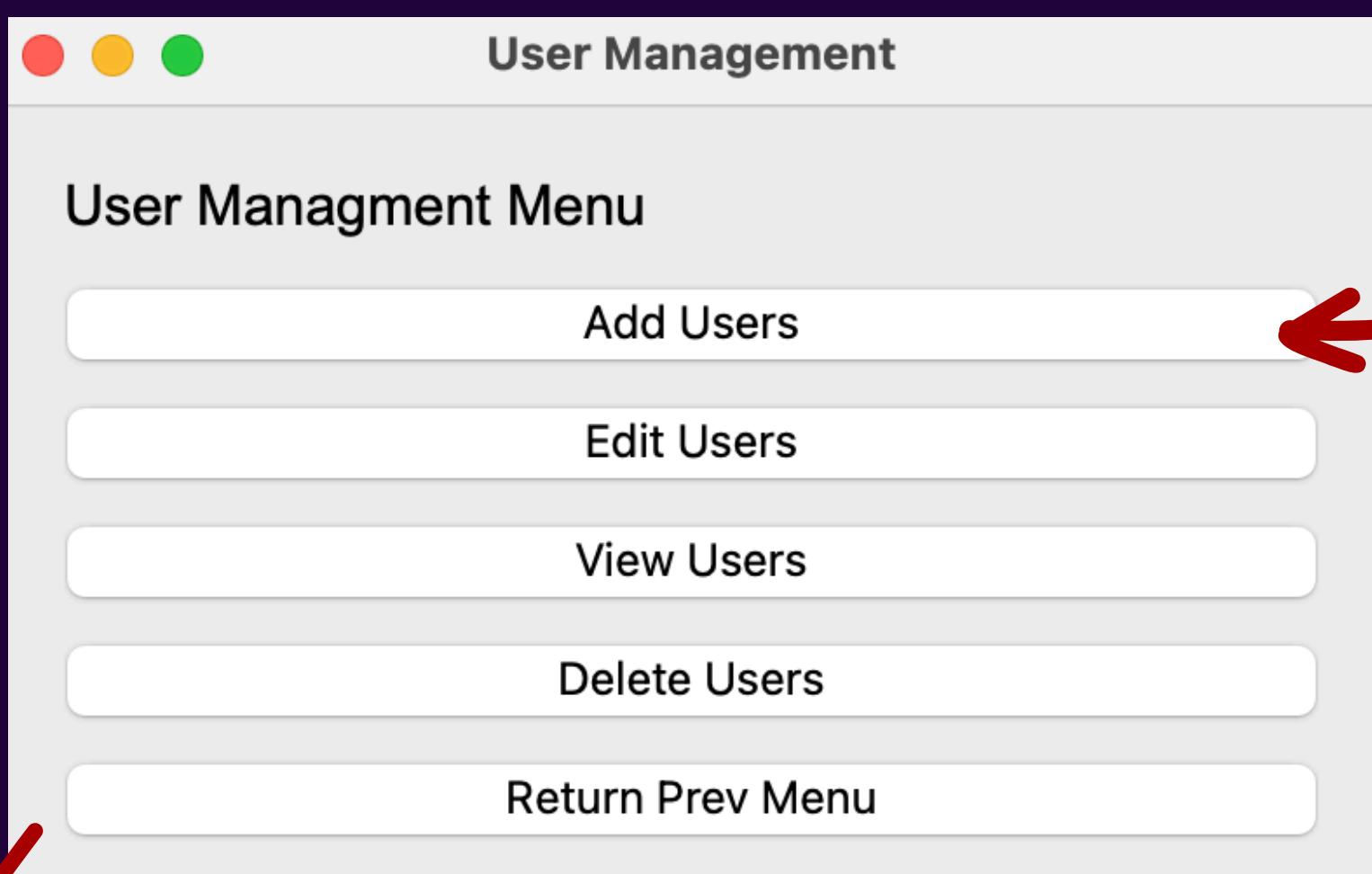


This window will appear

# USER MANAGEMENT MENU:

If you are an **Admin or HR** you will watch this window

**Adding a new user:**



This window will appear

Write the new user in  
the first box

Enter the new password

Define the user's role

Write user's Name

Write user's Lastname

Finally, click the button  
"Add User", and your  
user addition will be  
successful

Click the first  
button for **Adding**  
**a new user**

The window title is "ERP Sales System - Add User". It contains the following fields:

- User: [Input field]
- Password: [Input field]
- Role: Sales Management [Dropdown menu]
- Name: [Input field]
- Lastname: [Input field]
- Add User [Button]
- Return Prev Menu [Button]

A red arrow points from the text "For return to the Previous Menu, click the last button" to the "Return Prev Menu" button.

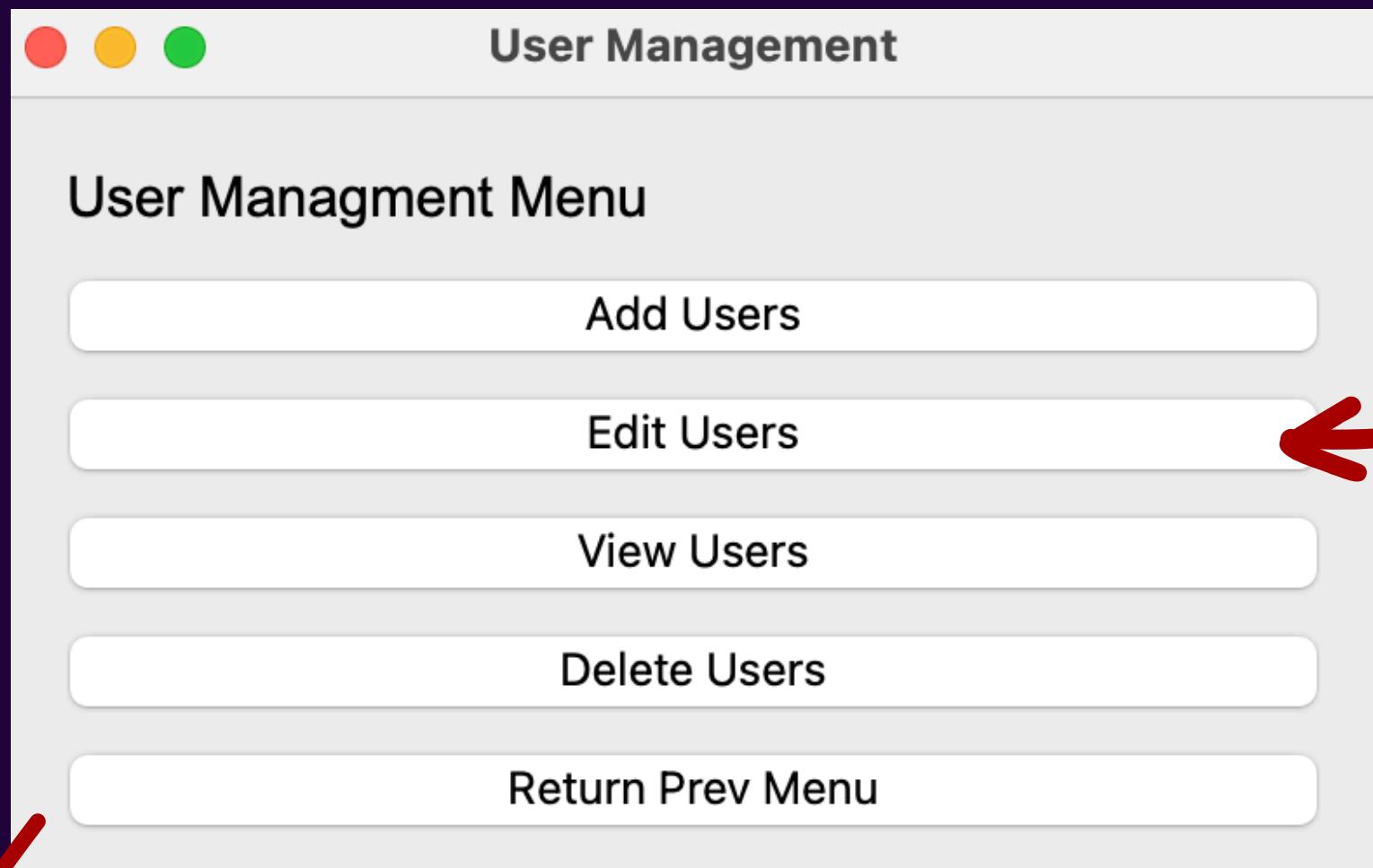
05

For return to the  
Previous Menu, click the  
last button

# USER MANAGEMENT MENU:

If you are an Admin or HR you will watch this window

## Editing a new user:



Click the second button for **Editing a new user**

This window will appear

Select the user you want to edit

Enter the new username

Enter the new password

Select user's role

Write user's name

Write user's Lastname

Finally, click the button "Edit User", and your user Edition will be succesful

ERP Sales System - Edit User

Edit Users Menu

User to edit: ✓ Messi

New Username: rafa

Password:

Role: Sales Managemnet

Name:

Lastname:

Edit User

Return Prev Menu

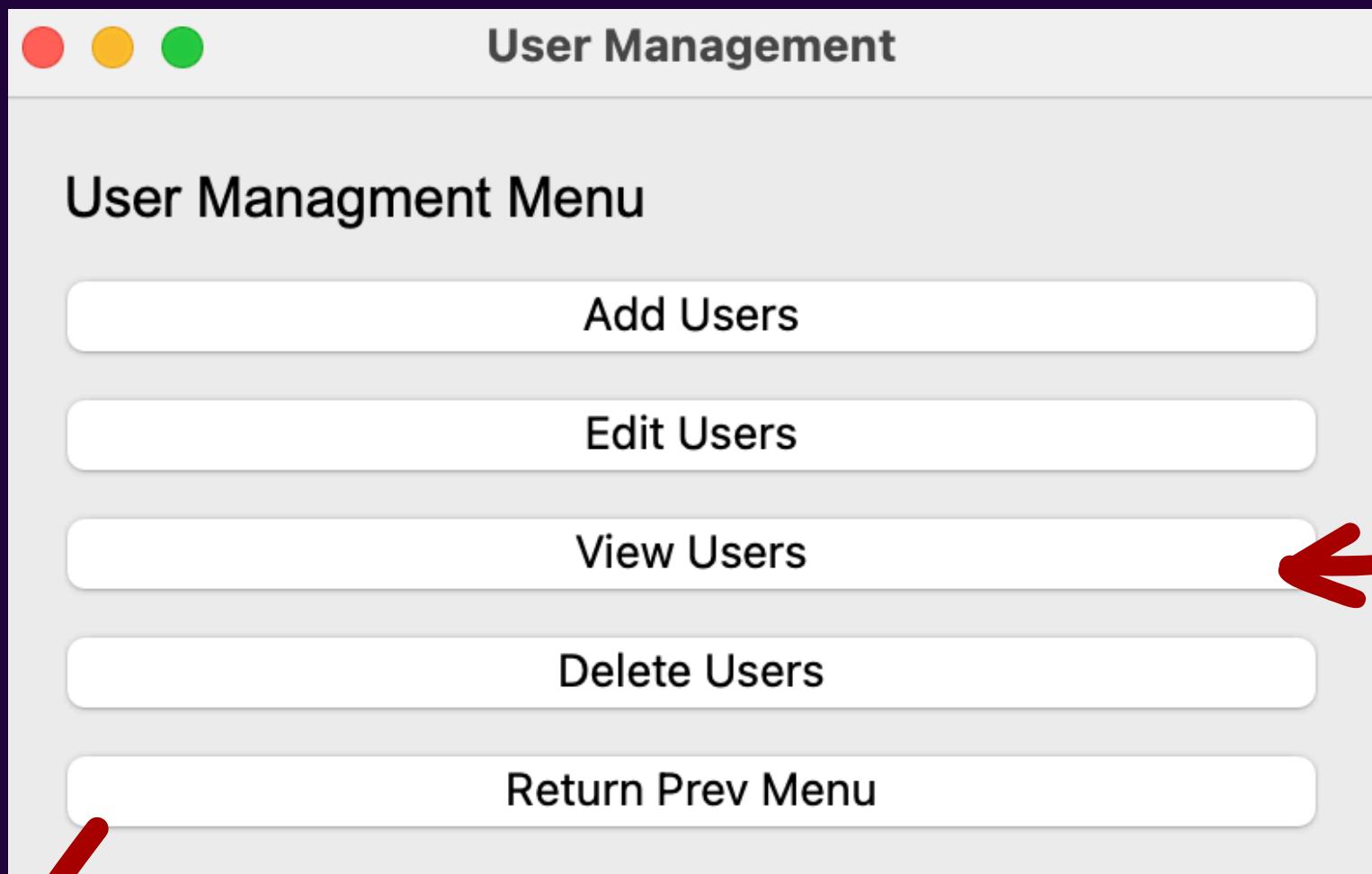
06

For return to the Previous Menu, click the last button

# USER MANAGEMENT MENU:

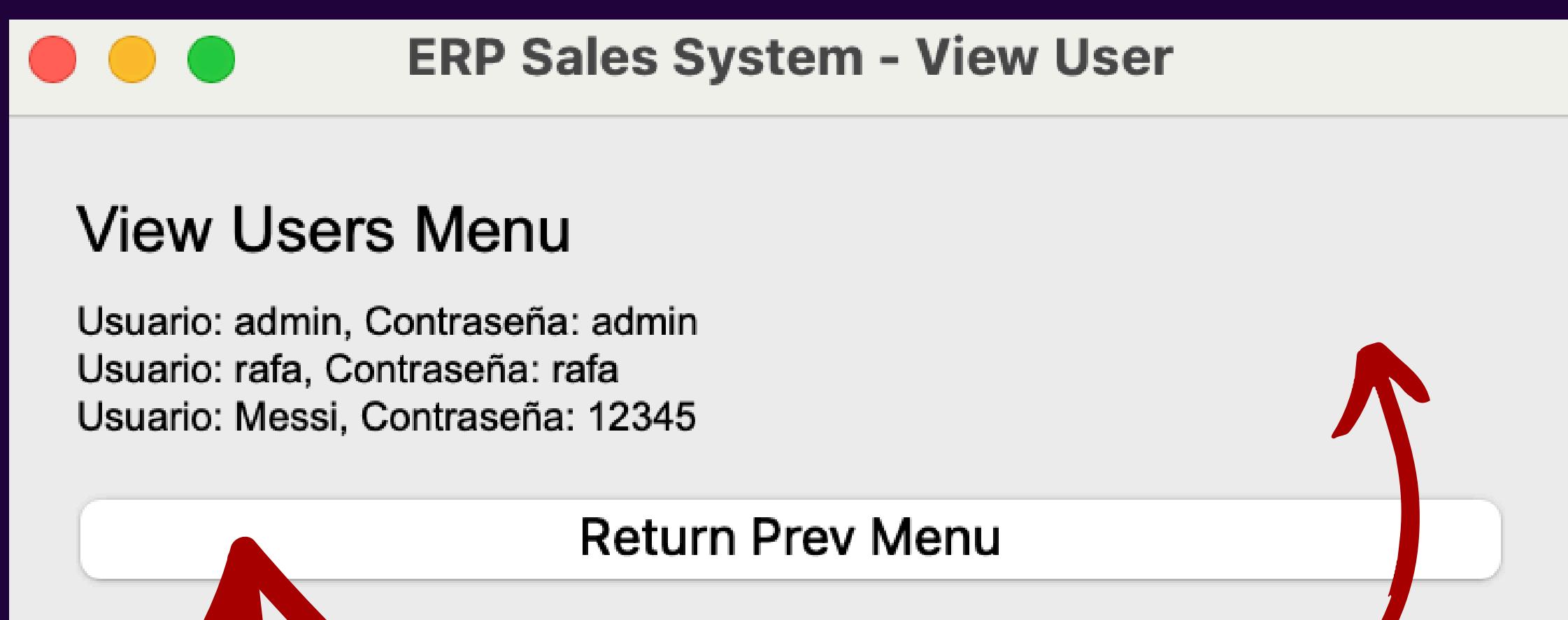
If you are an Admin or HR you will watch this window

Viewing users:



Click the third button  
for **Viewing users**

This window will appear



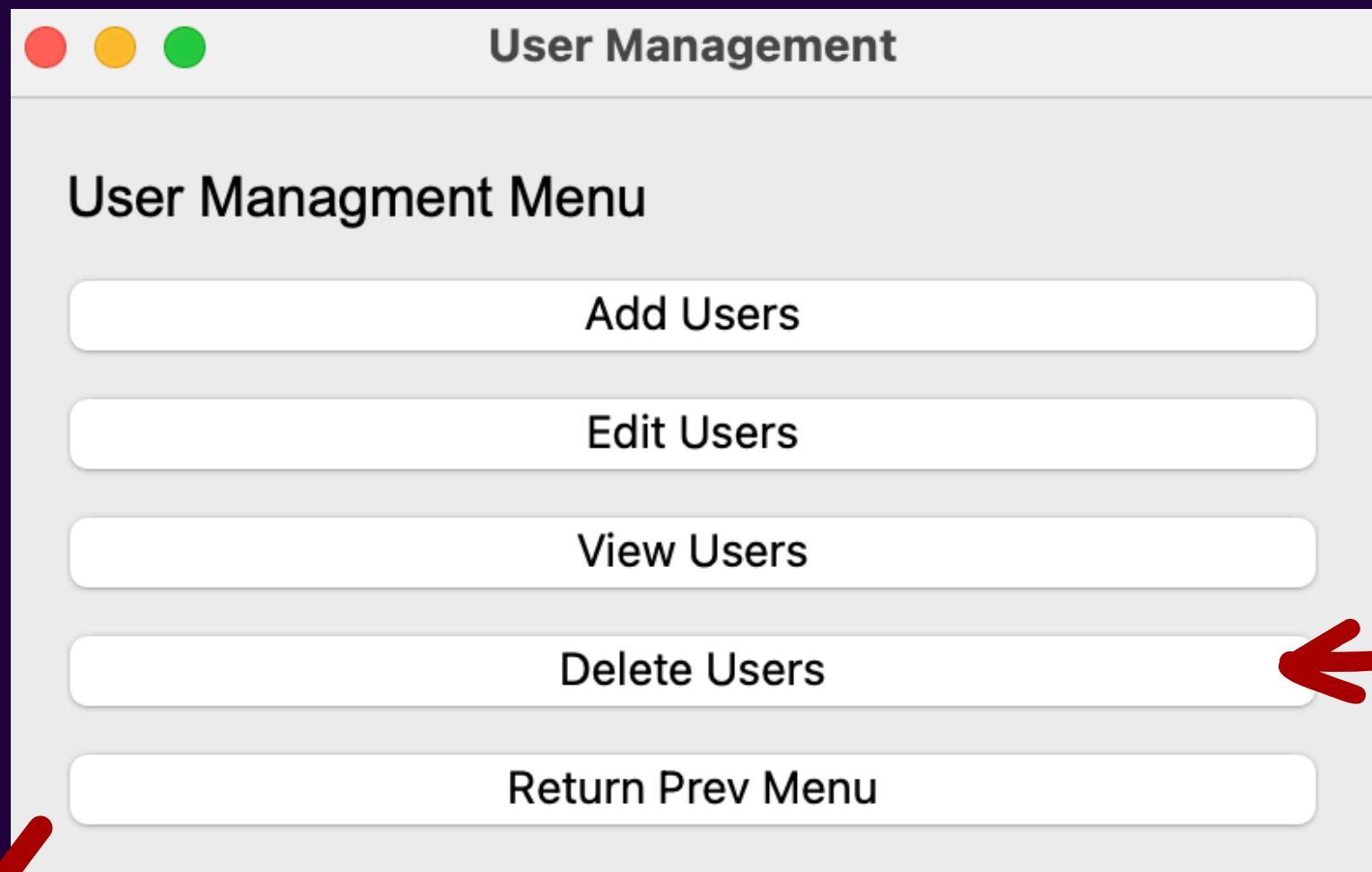
In this window all user registered  
in the system will appear and you  
will be able to consult them

For return to the  
Previous Menu, click the  
last button

# USER MANAGEMENT MENU:

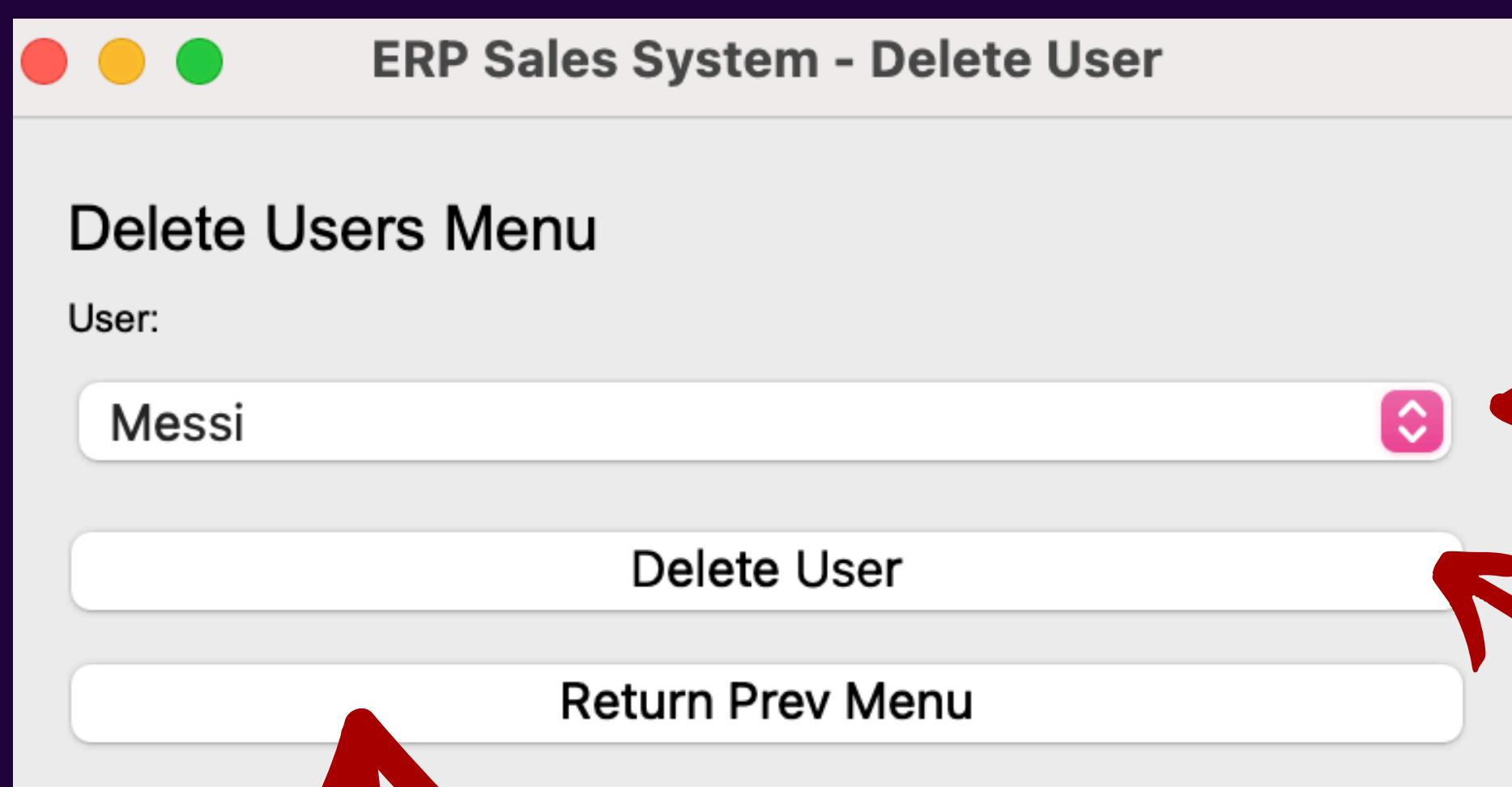
If you are an Admin or HR you will watch this window

Deleting a new user:



Click the fourth button  
for **Deleting a user**

This window will appear



Select the user  
that you want to  
delete

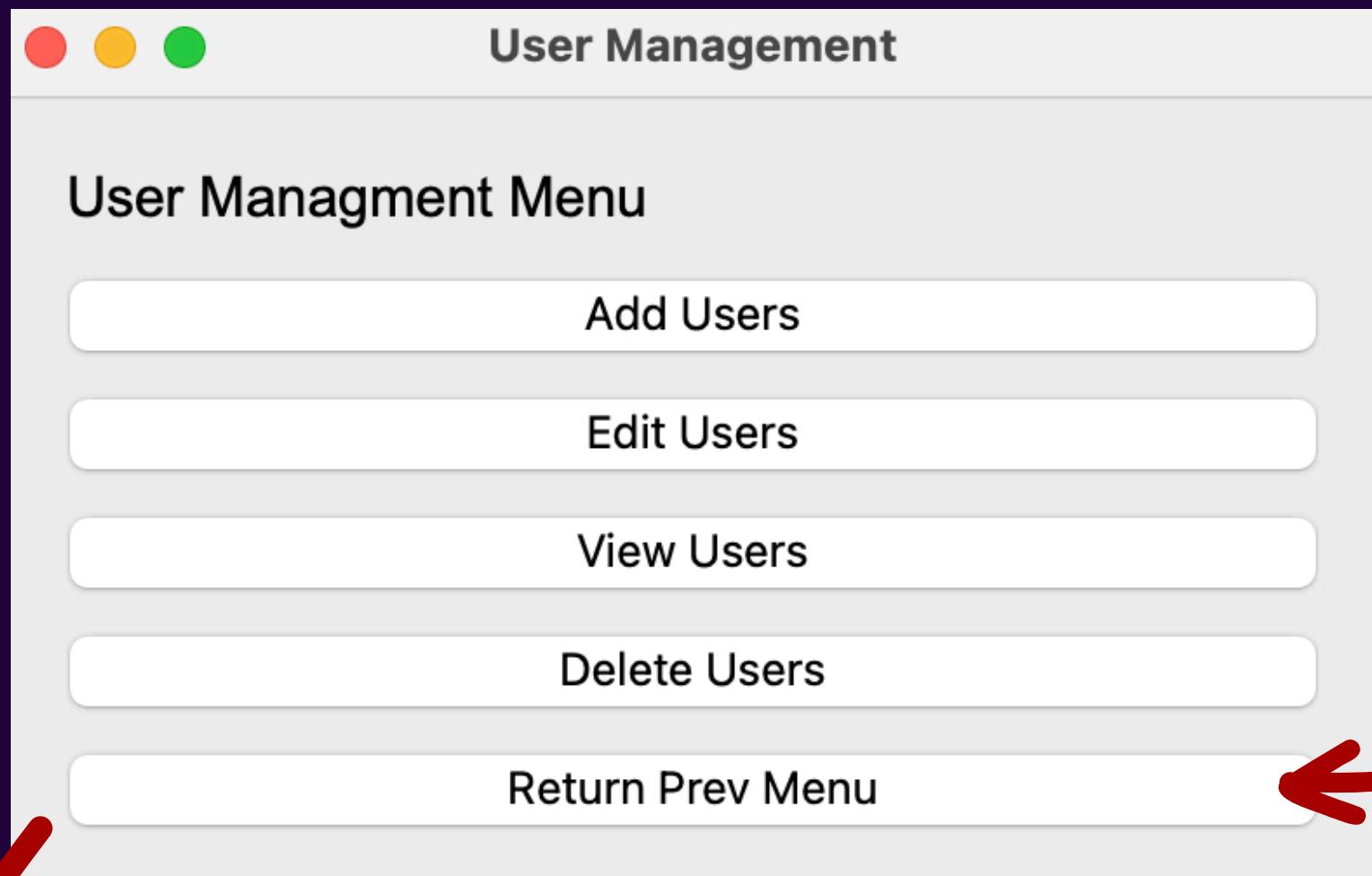
For return to the  
Previous Menu, click the  
last button

Finally, click the button  
"Delete User", and the  
user will be deleted.

# USER MANAGEMENT MENU:

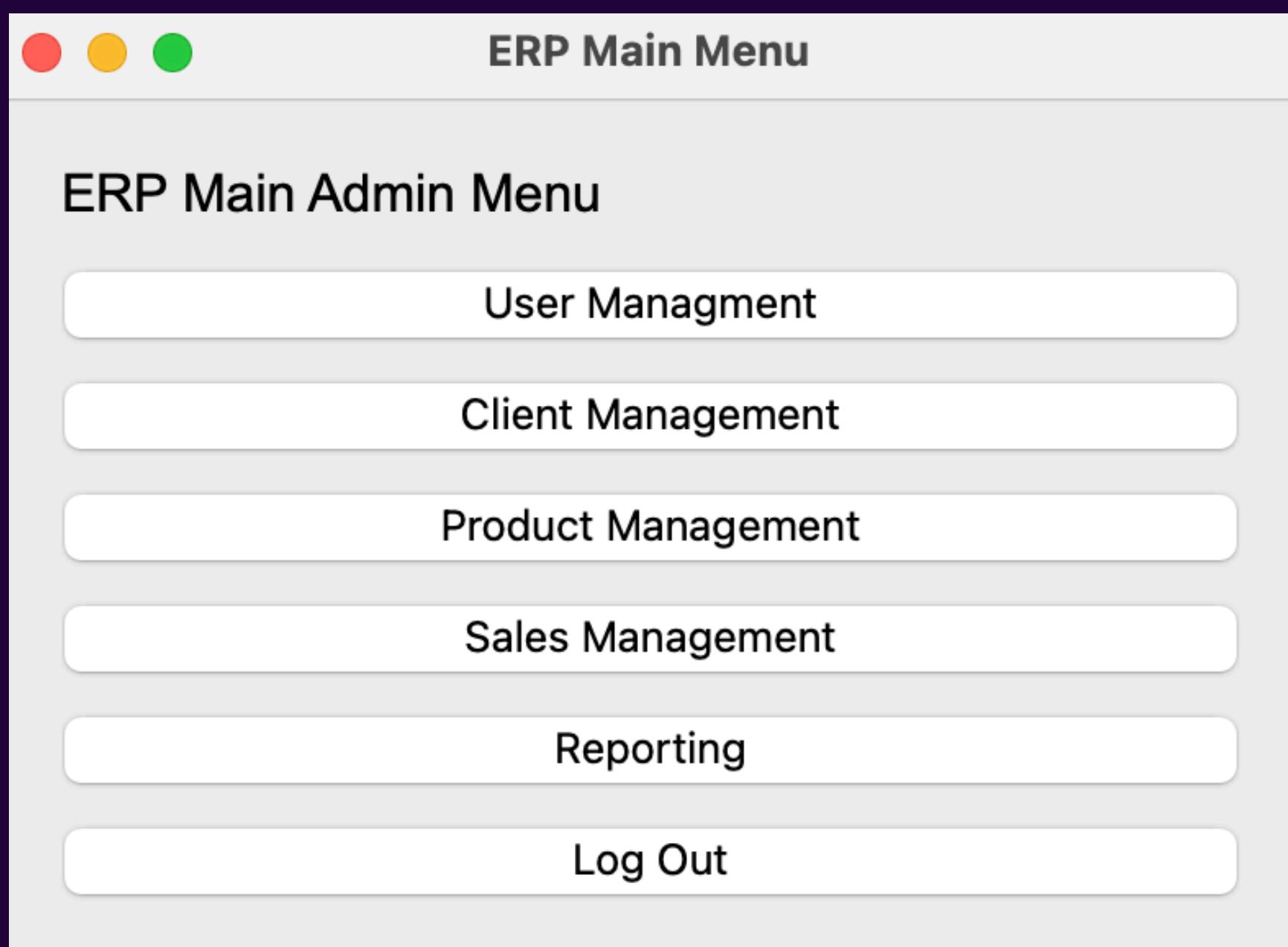
If you are an Admin or HR you will watch this window

Returning to the previous Window:



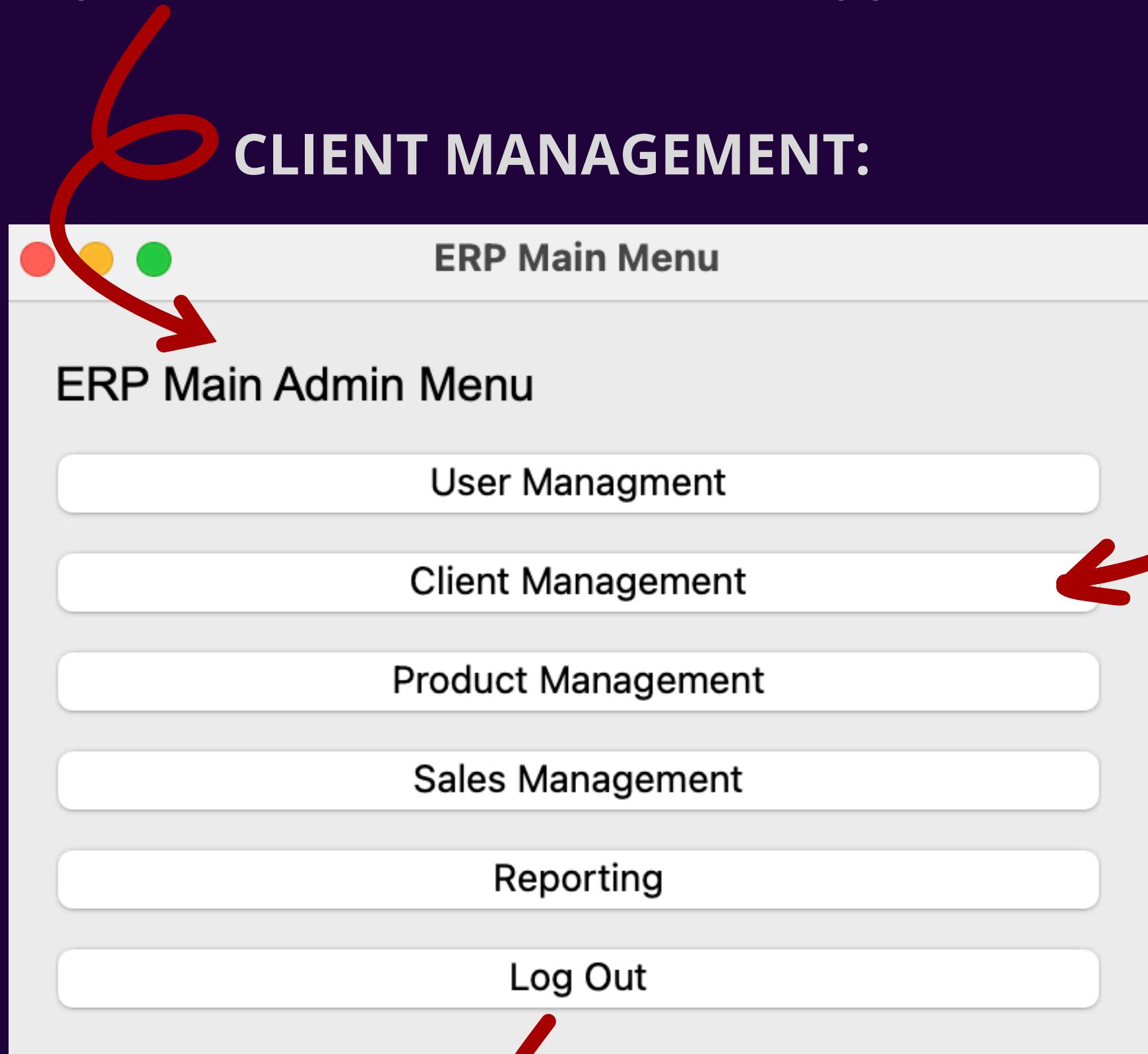
Click the fifth button  
for **Returning to the  
previous window**  
(main menu)

This window will appear



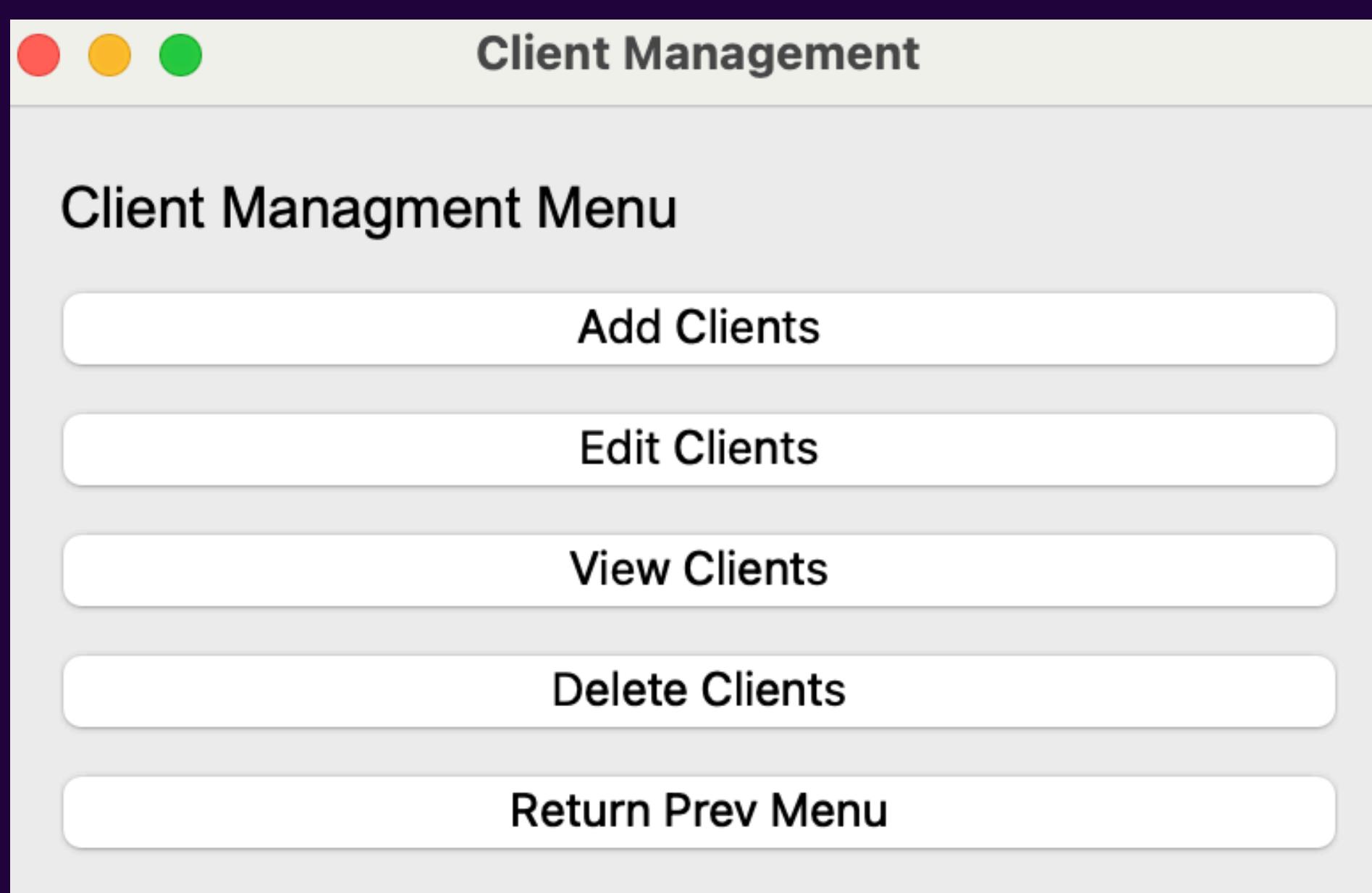
# MAIN ADMIN MENU:

Once you have logged in with your username and password, this window will appear



Click the second button for **Client Management**

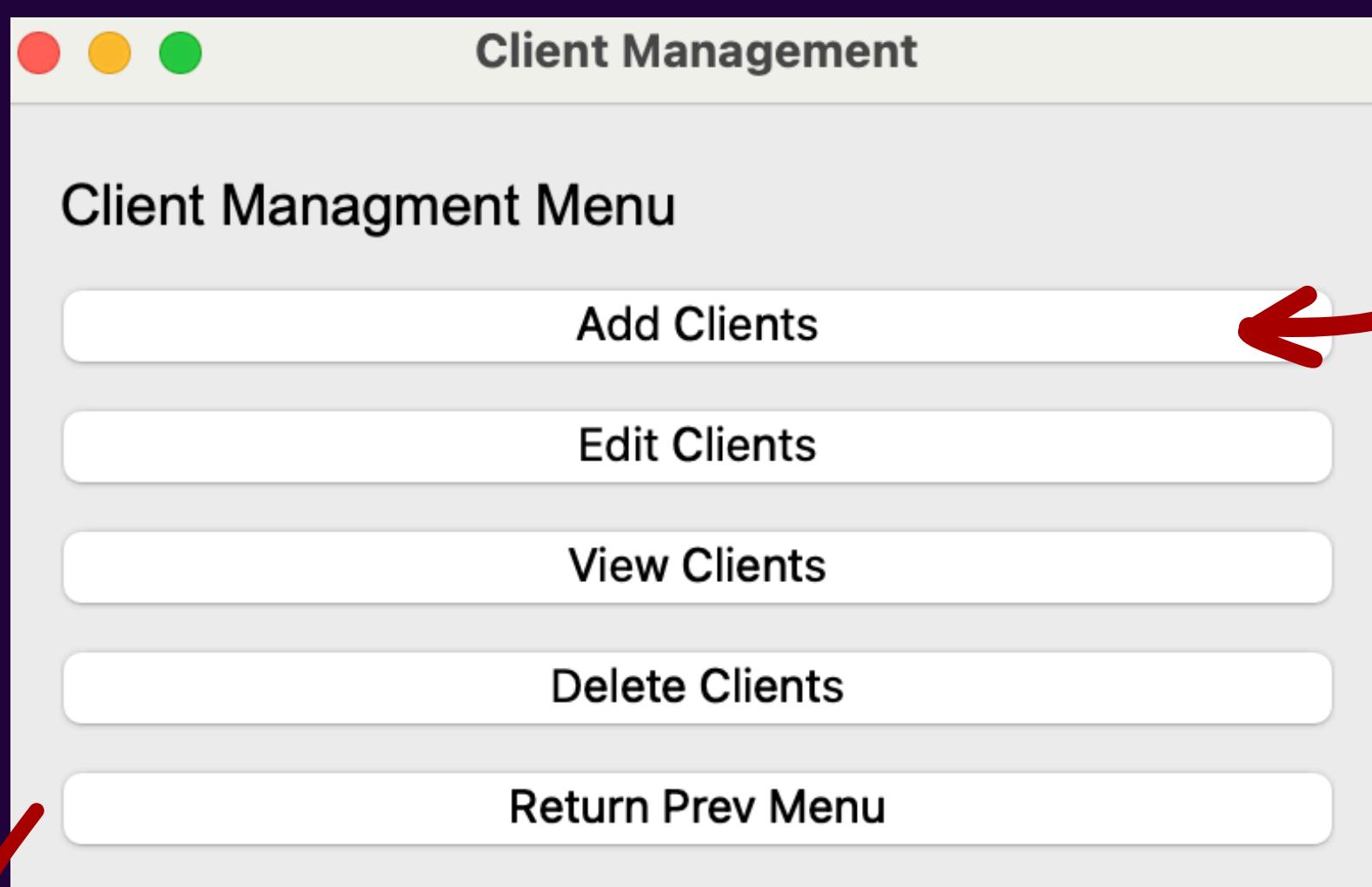
This window will appear



# CLIENT MANAGEMENT MENU:

If you are an Admin or Client Manager you will watch this window

Adding a new client:



Click the first button for **Adding a new client**

This window will appear

Write the new client in the first box

Enter the RFC

Enter the Fiscal Regimen

Write the client address

Write the client city

Write the client state

Write the client zip code

Finally, click the button "Add client", and your client addition will be successful

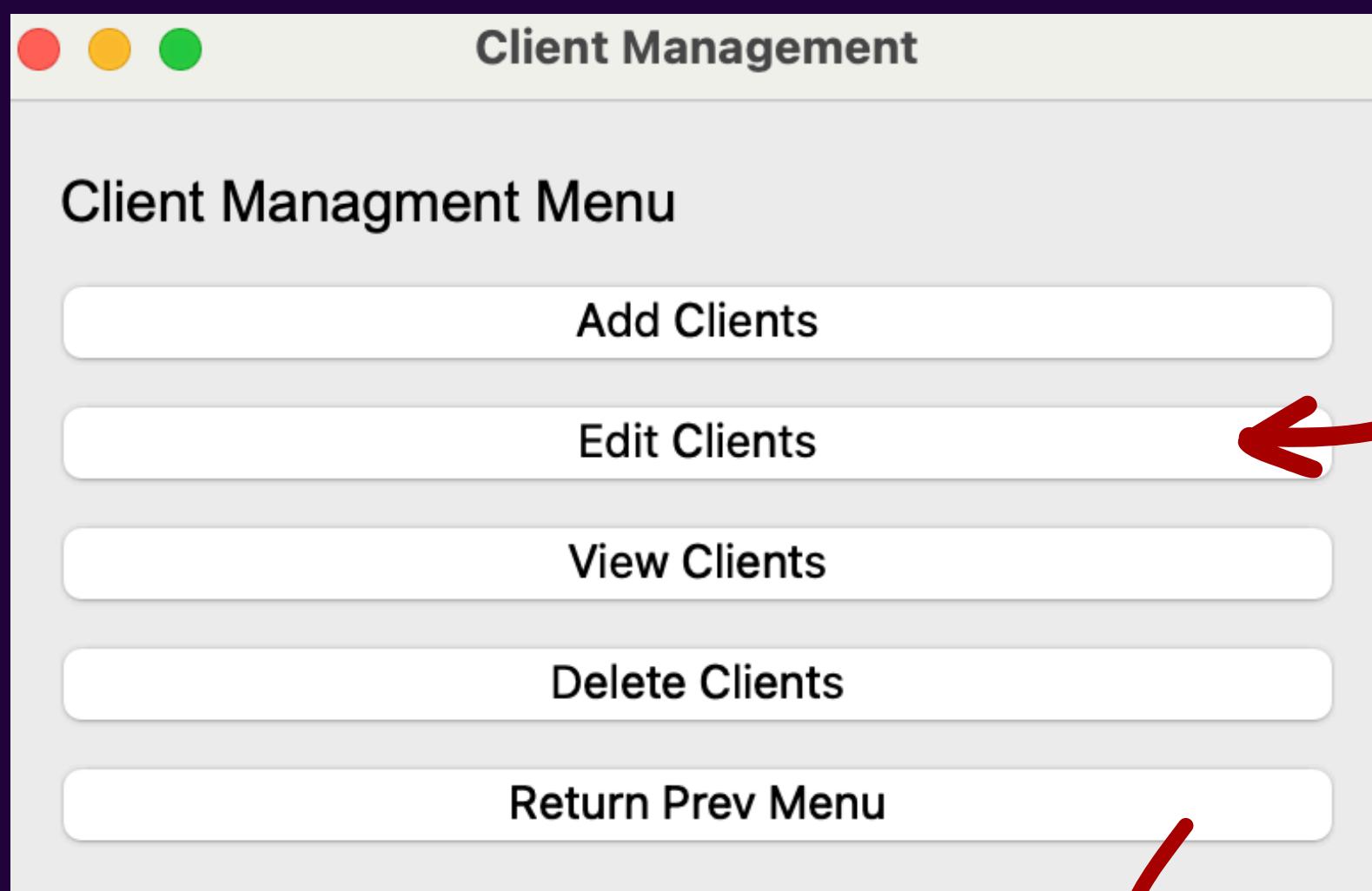
The image shows a window titled "ERP Sales System - Add Client". It has a title "Add Clients Menu" and several input fields: "Client:", "RFC:", "Fiscal Regimen:", "Address:", "City:", "State:", and "Zip Code:". Below these fields are two buttons: "Add Client" and "Regresar al menú anterior". Red arrows point from the text instructions on the left to each corresponding input field. A red arrow also points from the text "For return to the Previous Menu, click the last button" to the "Regresar al menú anterior" button.

**11** For return to the Previous Menu, click the last button

# CLIENT MANAGEMENT MENU:

If you are an Admin or Client Manager you will watch this window

Editing a client:



Click the second button for **Editing a new client**

This window will appear

A screenshot of a Mac OS X-style window titled "ERP Sales System - Edit Client". The window contains a title bar with red, yellow, and green buttons, and a menu bar with "Edit Client". The main area is titled "Edit Clients Menu" and contains several input fields: "Name to edit:" (with "Ceci" selected), "New Name:" (empty), "RFC:" (empty), "Fiscal Regimen:" (empty), "Address:" (empty), "City:" (empty), "State:" (empty), and "Zip Code:" (empty). At the bottom are two buttons: "Edit Client" and "Regresar al menú anterior". Red arrows point from the left side of the page to each of these input fields, indicating where user input should be entered.

Select the client you want to edit in the first box

Enter the new client name

Enter the client RFC

Enter the Fiscal Regimen

Write the client address

Write the client city

Write the client state

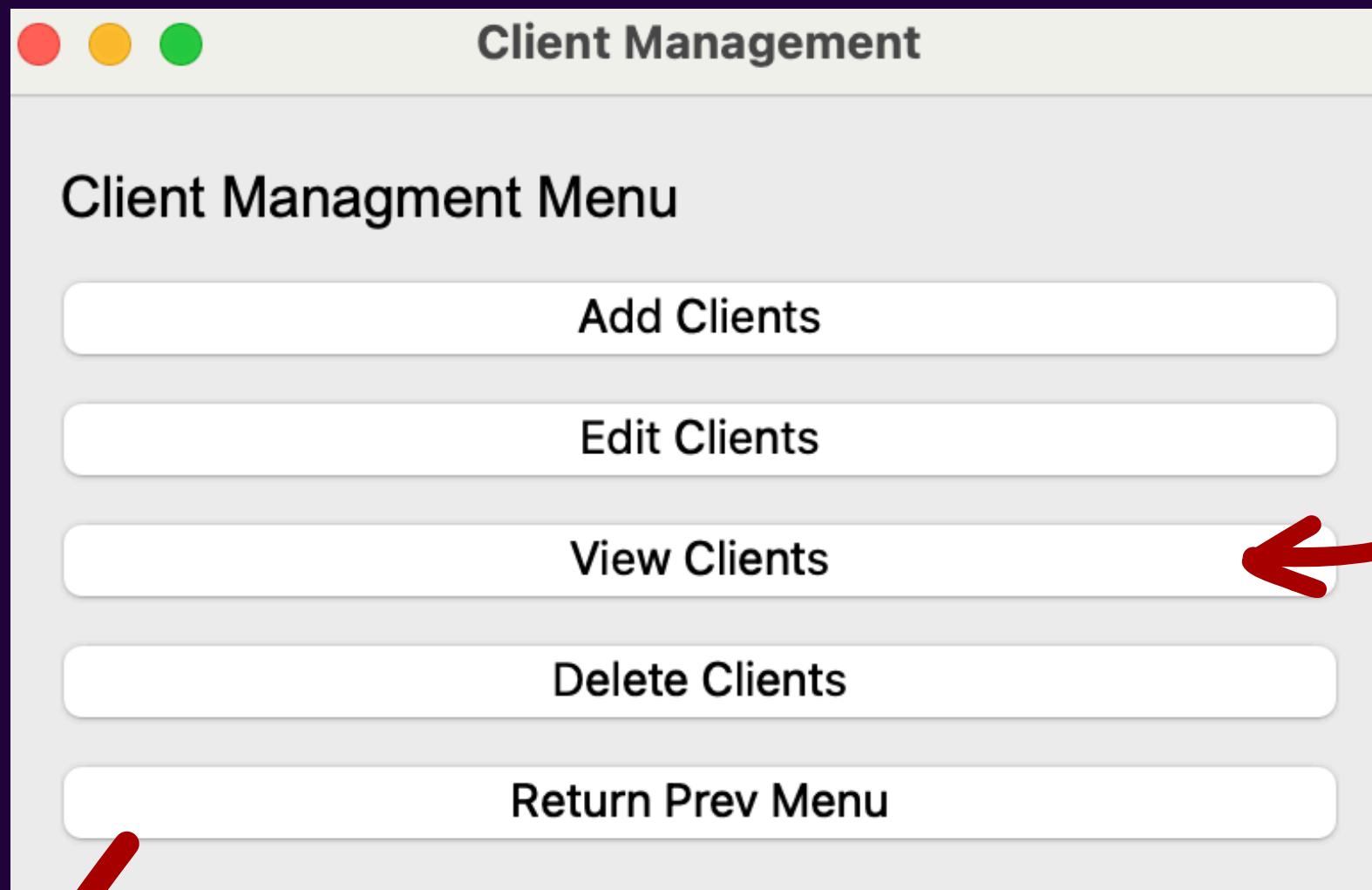
Write the client zip code

Finally, click the button "Edit client", and your client edition will be successful

# CLIENT MANAGEMENT MENU:

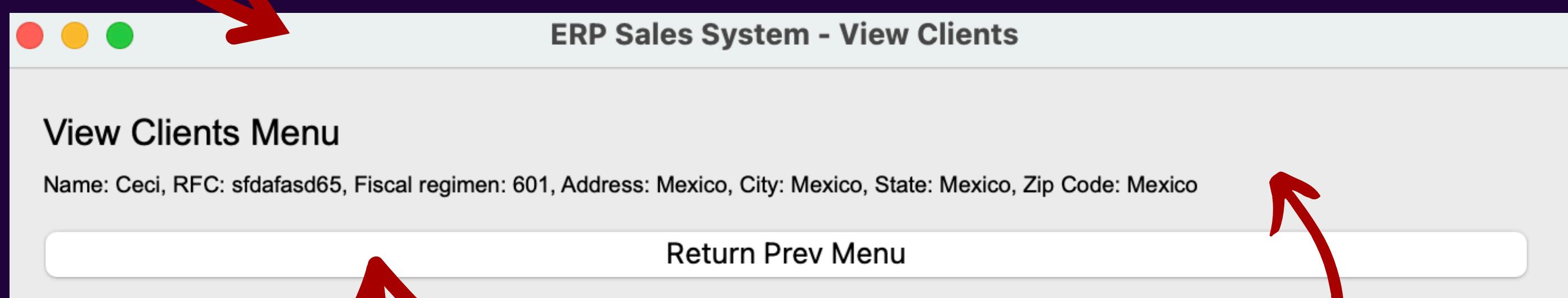
If you are an Admin or Client Manager you will watch this window

**Viewing clients:**



Click the third  
button for  
**Viewing clients**

This window will appear



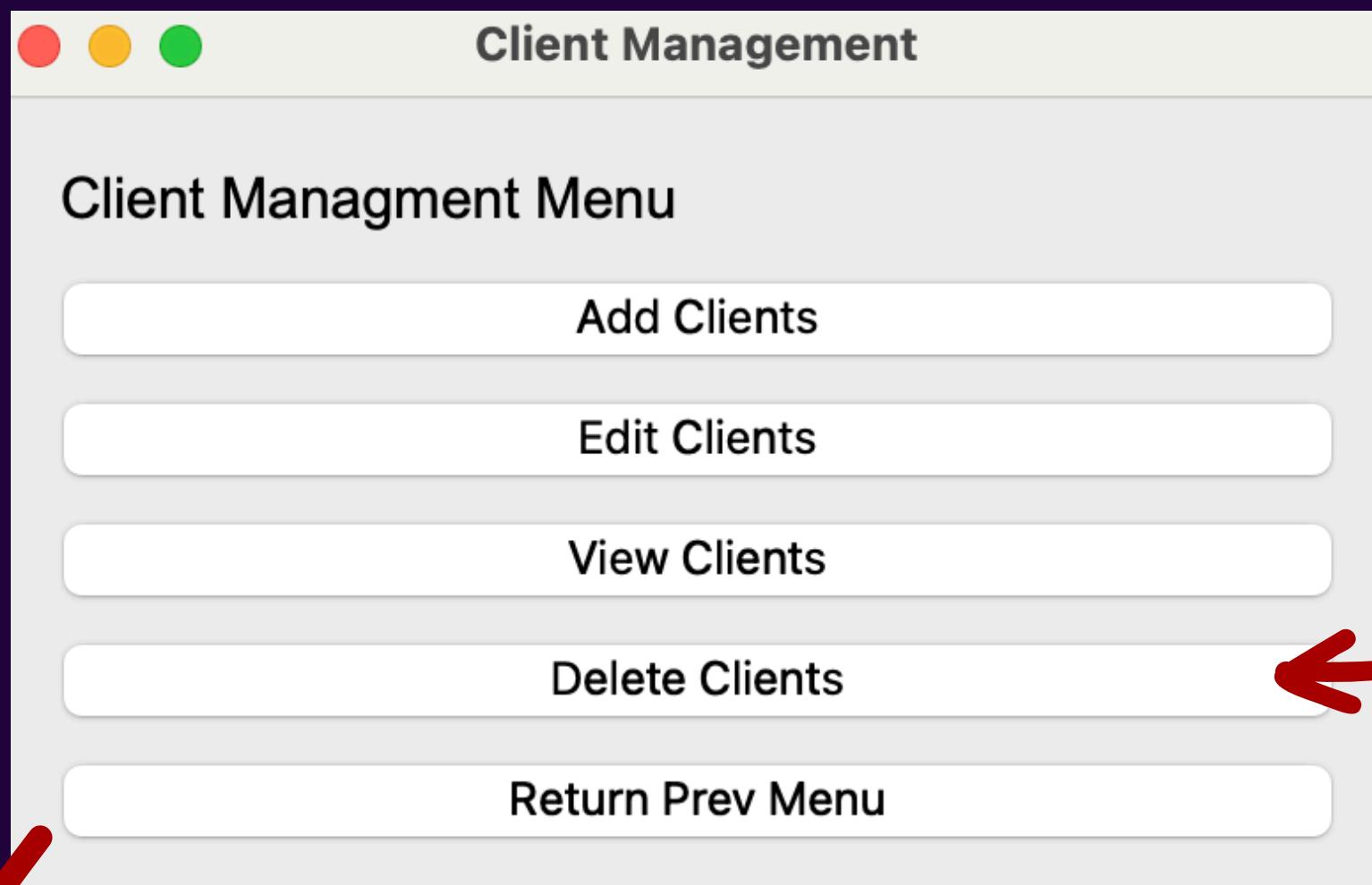
For return to the  
Previous Menu, this  
button

You can consult all the  
clients registered in the  
system.

# CLIENT MANAGEMENT MENU:

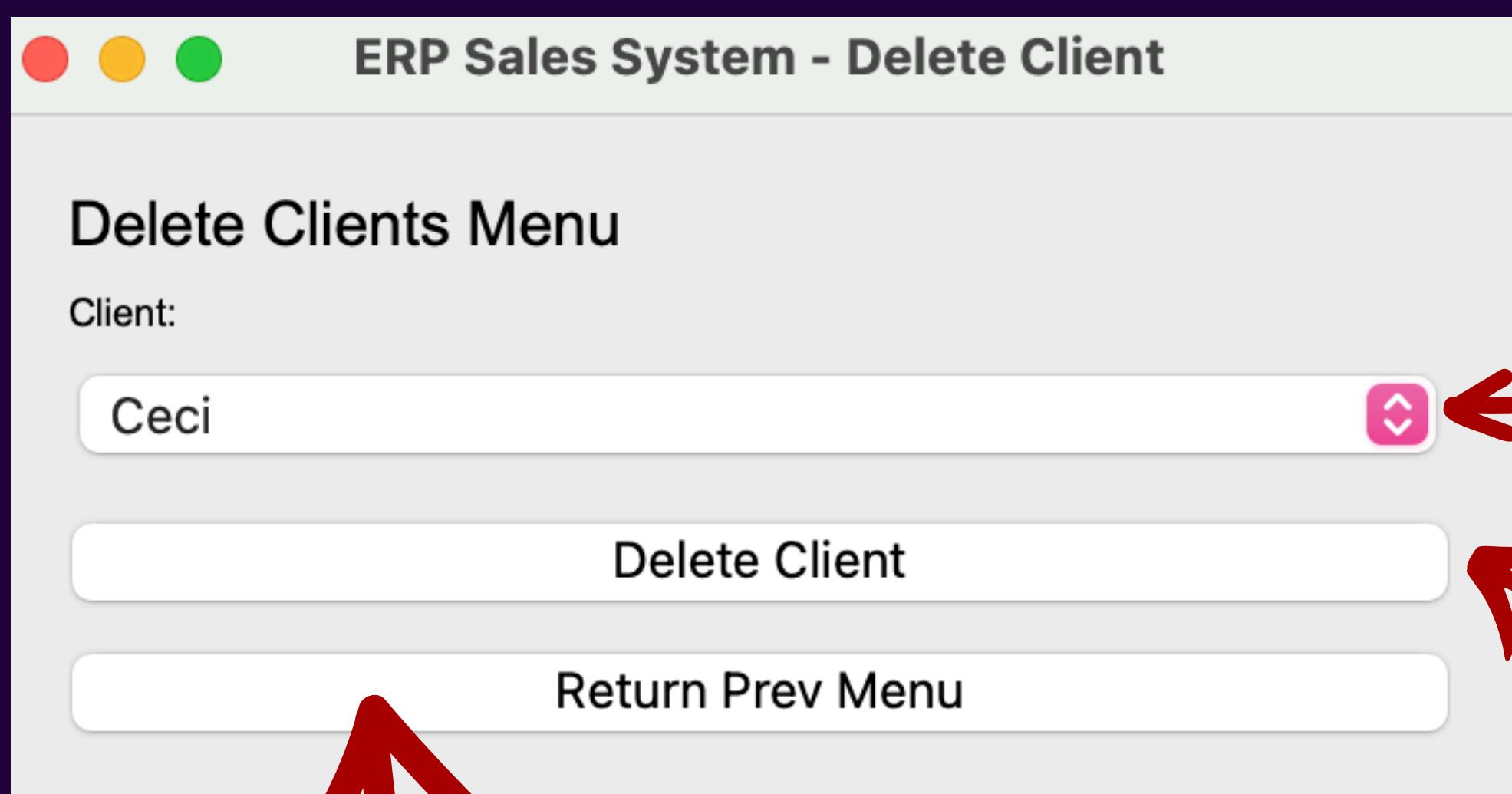
If you are an Admin or Client Manager you will watch this window

Deleting a new client:



Click the fourth button  
for **Deleting a client**

This window will appear



Select the client  
that you want to  
delete

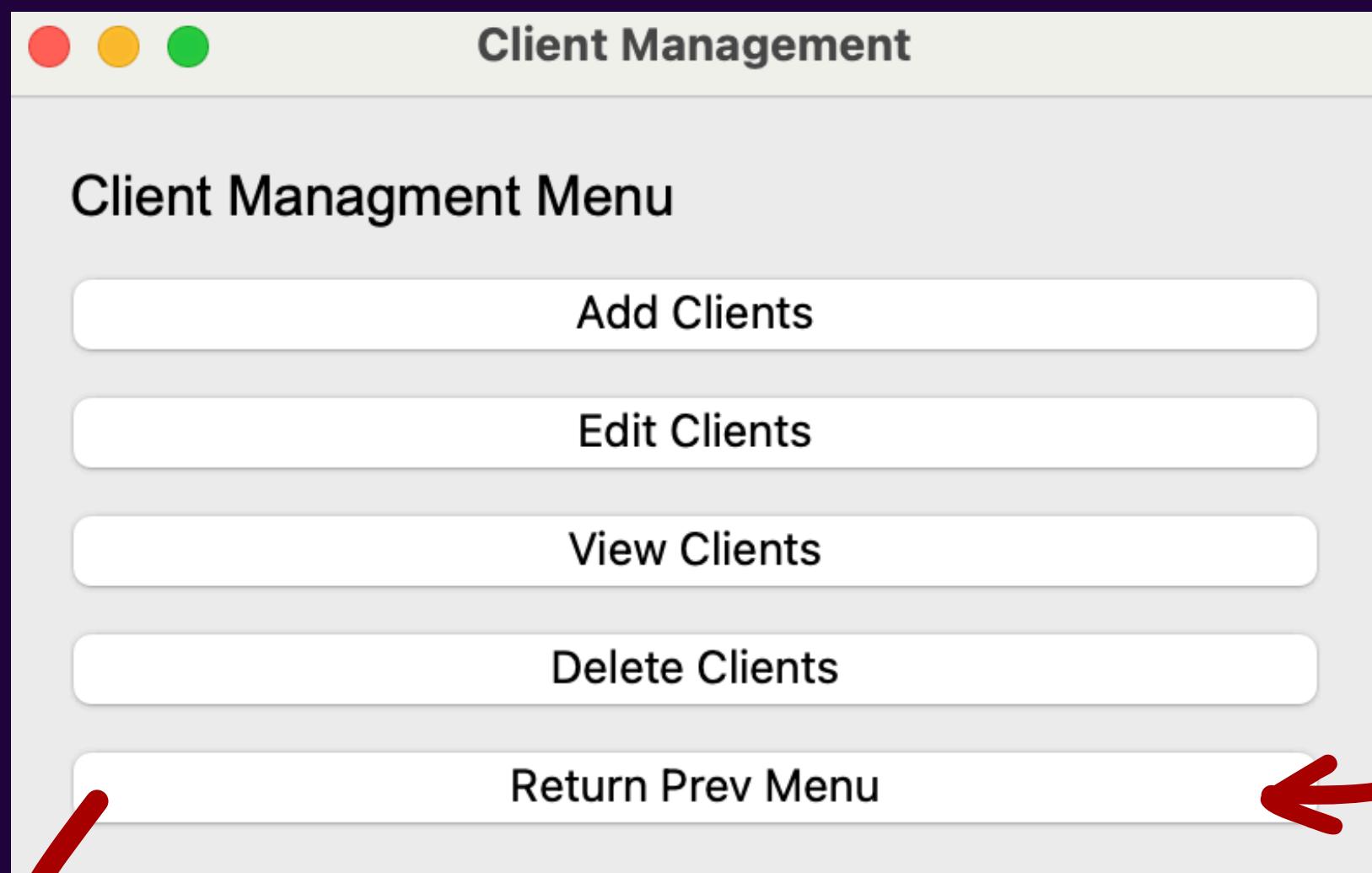
Finally, click the button  
“Delete Client”, and the  
client will be deleted.

For return to the  
Previous Menu, in this  
button

# CLIENT MANAGEMENT MENU:

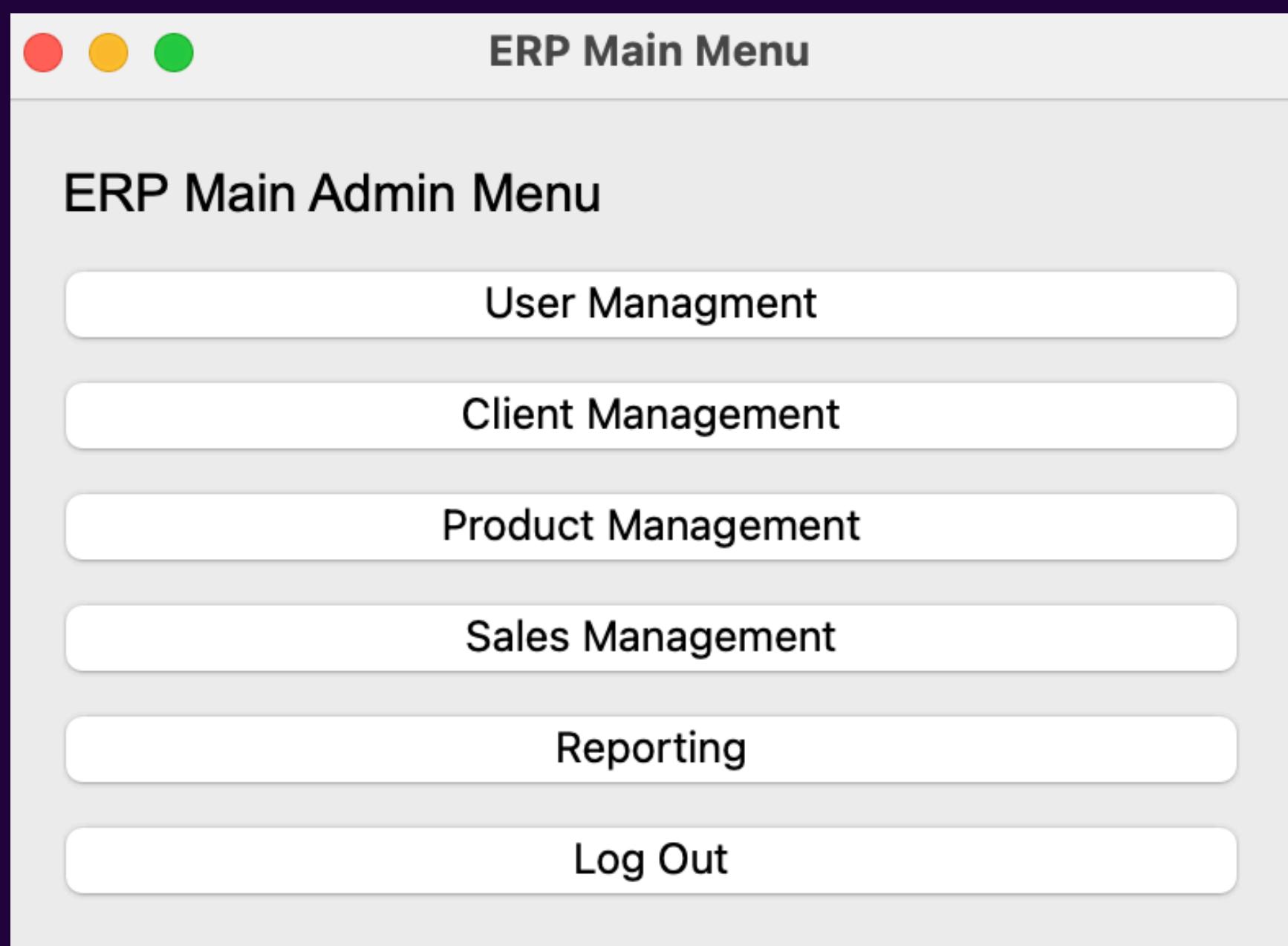
If you are an Admin or Client Manager you will watch this window

Returning to the previous Window:



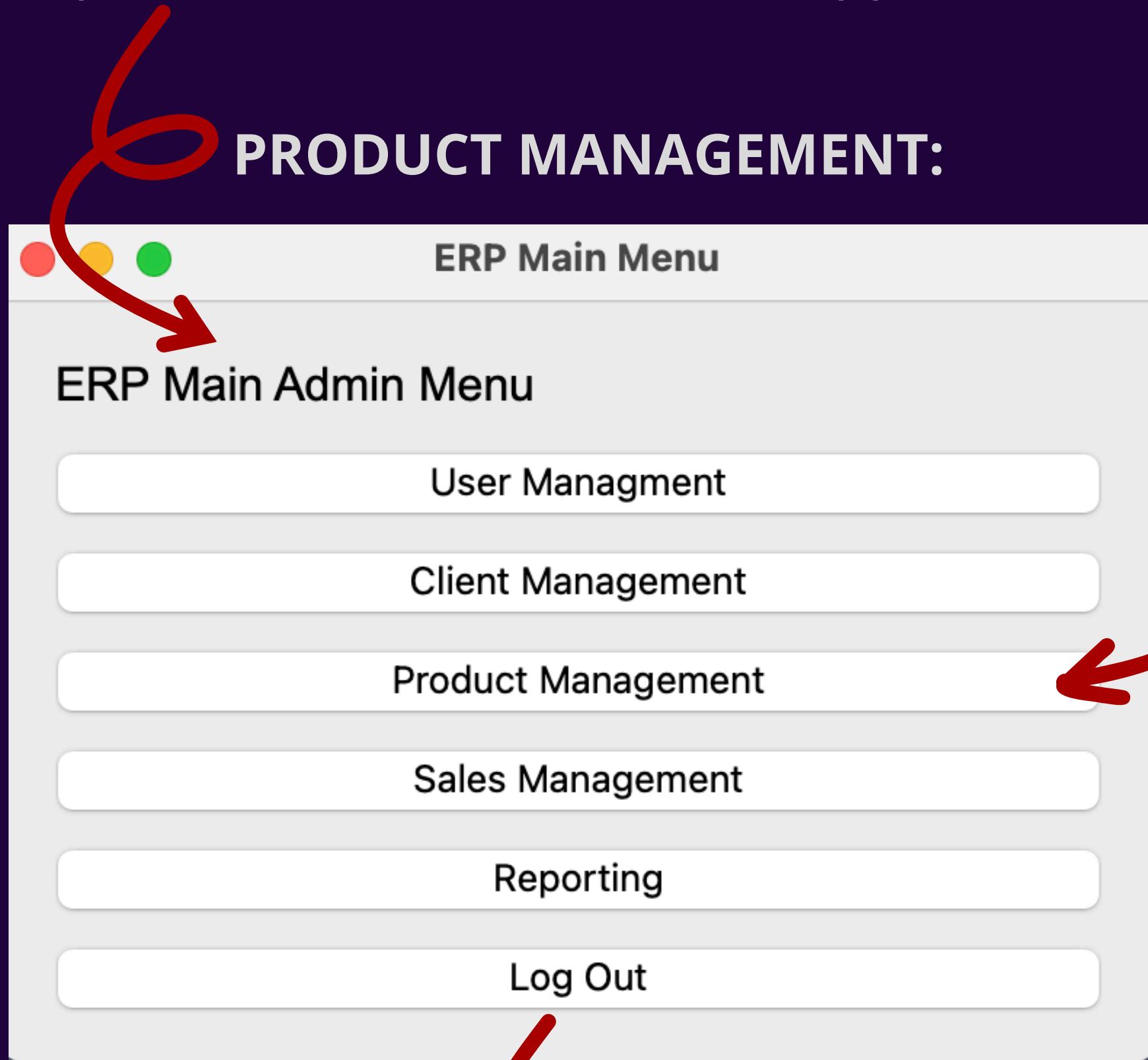
Click the fifth/ last button for **Returning to the previous window** (main menu)

This window will appear



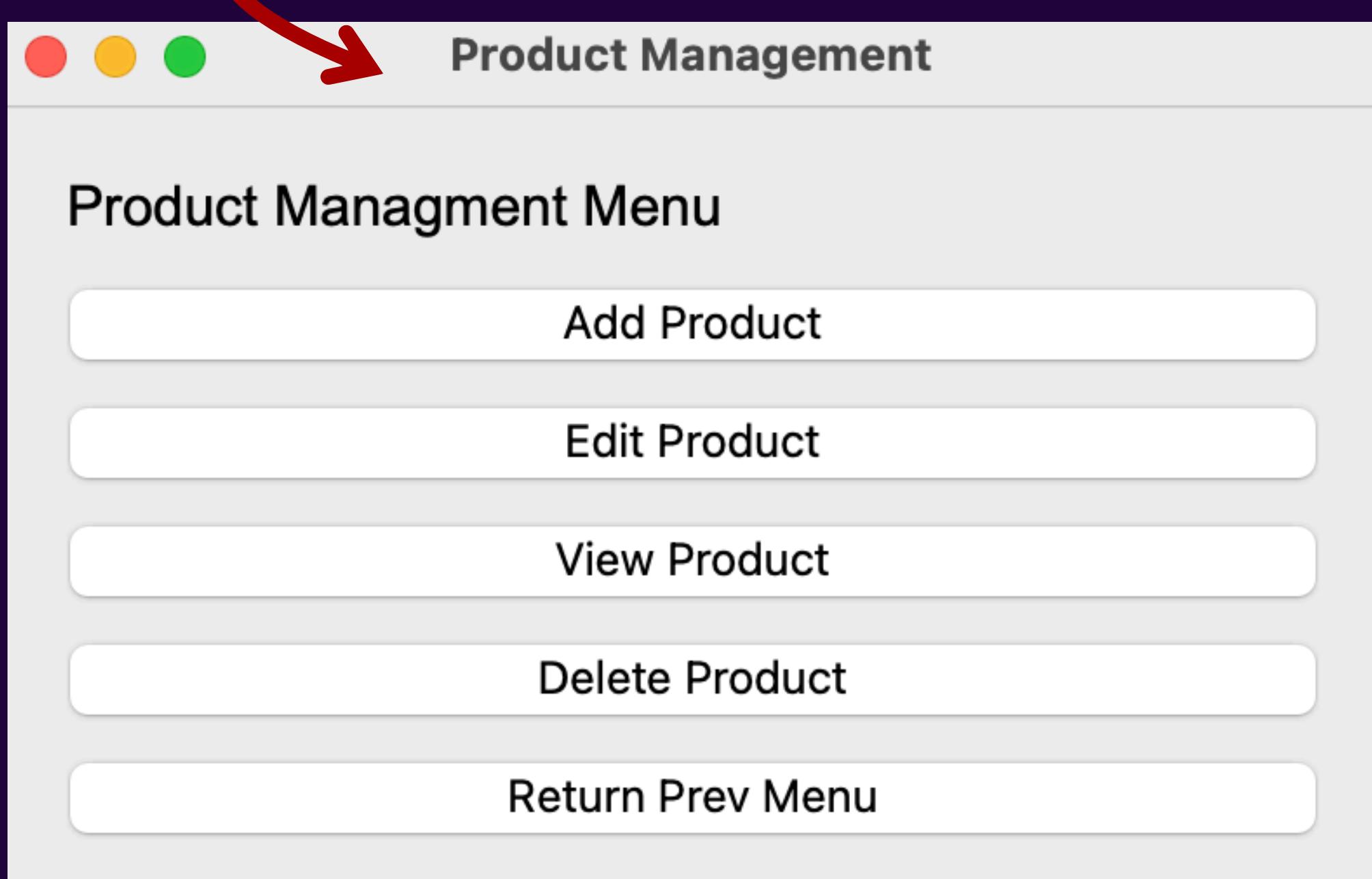
# MAIN ADMIN MENU:

Once you have logged in with your username and password, this window will appear



Click the third button  
for **Product  
Management**

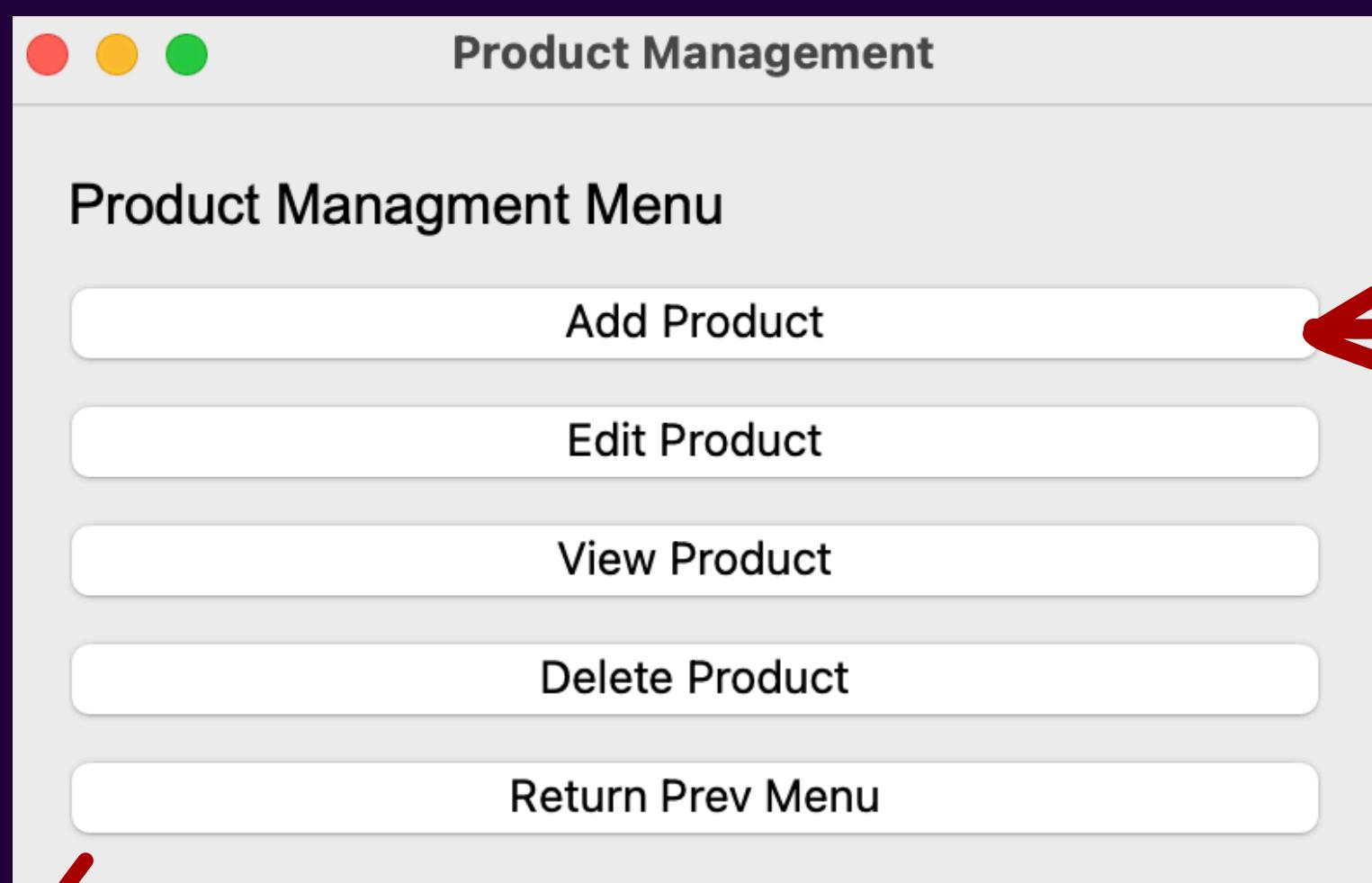
This window will appear



# PRODUCT MANAGEMENT MENU:

If you are an Admin or Product Manager you will watch this window

## Adding a new Product:



Click the first button for **Adding a new product**

This window will appear

Enter the Universal Product Code in the first box

Enter the product name

Define the product presentation

Enter the Price Tag

Enter the cost

Define the VAT inclusion

Enter the stock Quantity

Finally, click the button "Add Product", and your product addition will be successful

This window is titled "ERP Sales System - Add Product". It contains several input fields and dropdown menus:

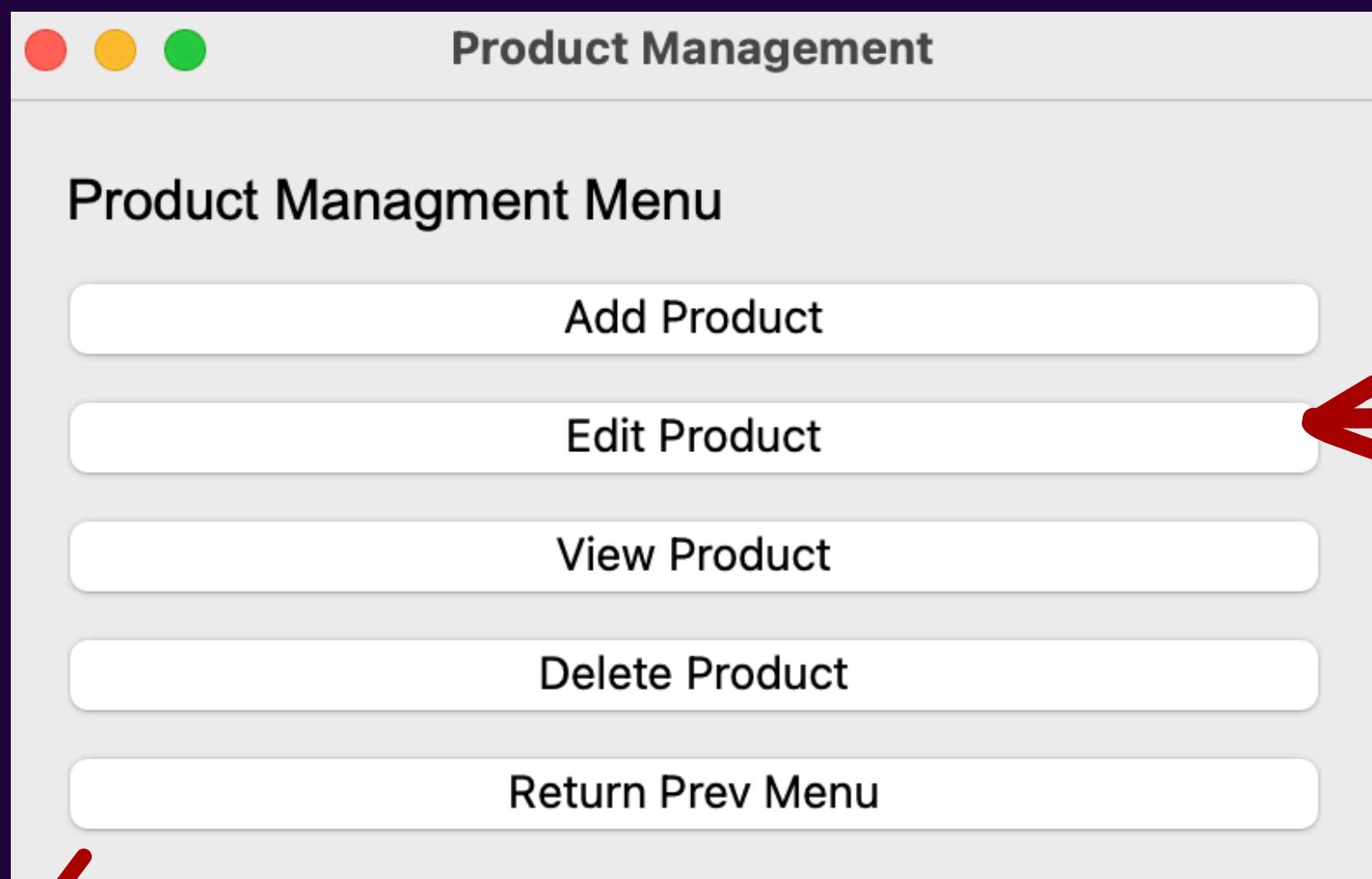
- UPC: [Input field]
- Product name: [Input field]
- Presentation: [Dropdown menu] (Box)
- Price Tag: [Input field]
- Cost: [Input field]
- VAT inclusion: [Dropdown menu] (True)
- Stock Quantity: [Input field]

At the bottom are two buttons: "Add Product" and "Return Prev Menu".

# PRODUCT MANAGEMENT MENU:

If you are an Admin or Product Manager you will watch this window

## Editing a new Product:



Click the second button for **Editing a new product**

This window will appear

Define the product to edit in the first box

Enter the Universal Product Code

Define the new product

Define the Product presentation

Enter the price tag

Enter the cost

Define the VAT inclusion

Enter the stock Quantity

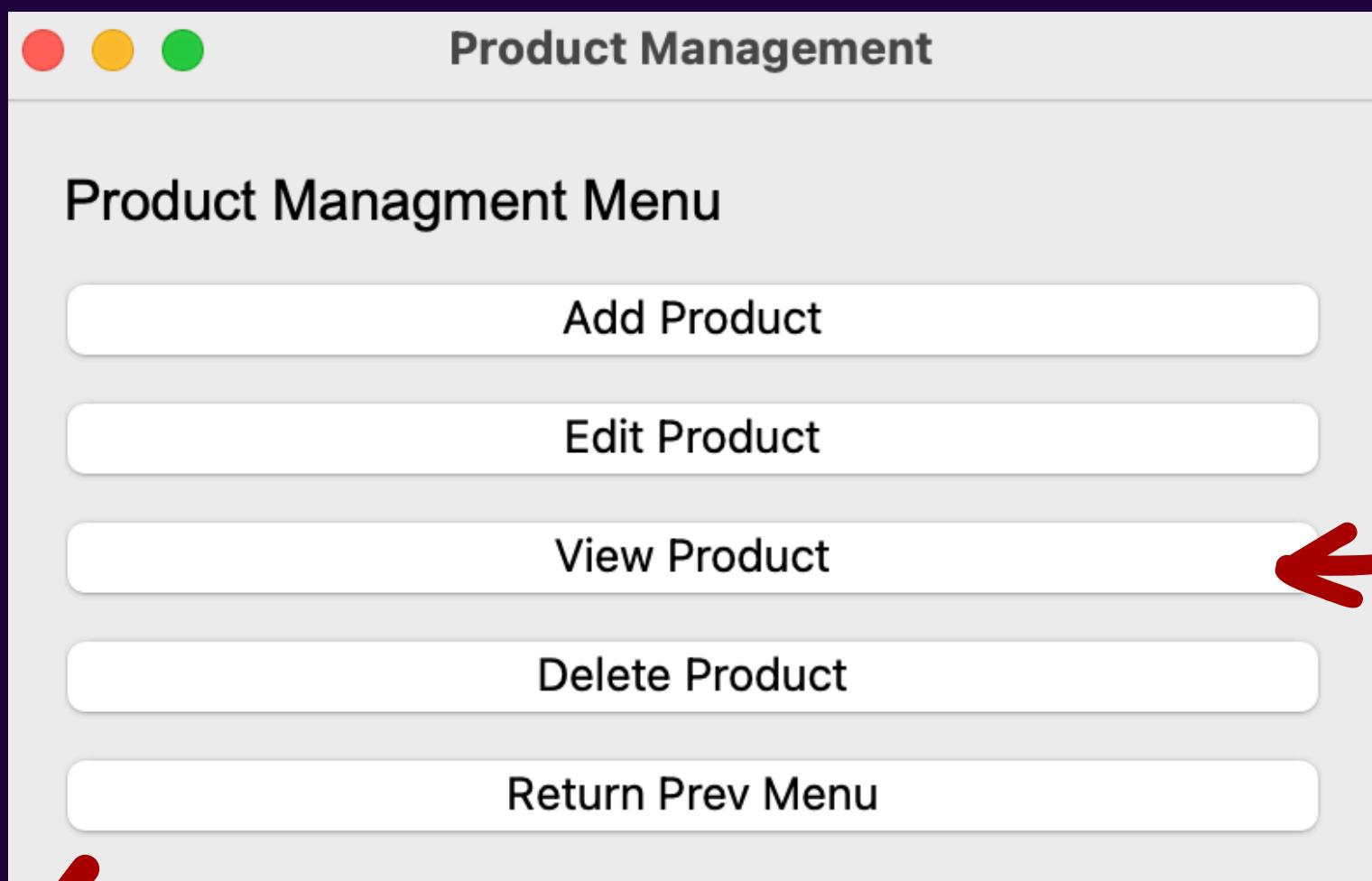
Finally, click the button "Edit Product", and your product edition will be successful

This window is titled "ERP Sales System - Edit Product". It has a form titled "Edit Products Menu" with the following fields:  
Product to edit: Colgate  
UPC: (empty input field)  
New Product: (empty input field)  
Presentation: Box  
Price Tag: (empty input field)  
Cost: (empty input field)  
VAT inclusion: True  
Stock Quantity: (empty input field)  
At the bottom are two buttons: "Edit User" and "Return Prev Menu". A red arrow points from the "Edit Product" button in the first window to the "Edit User" button in this window.

# PRODUCT MANAGEMENT MENU:

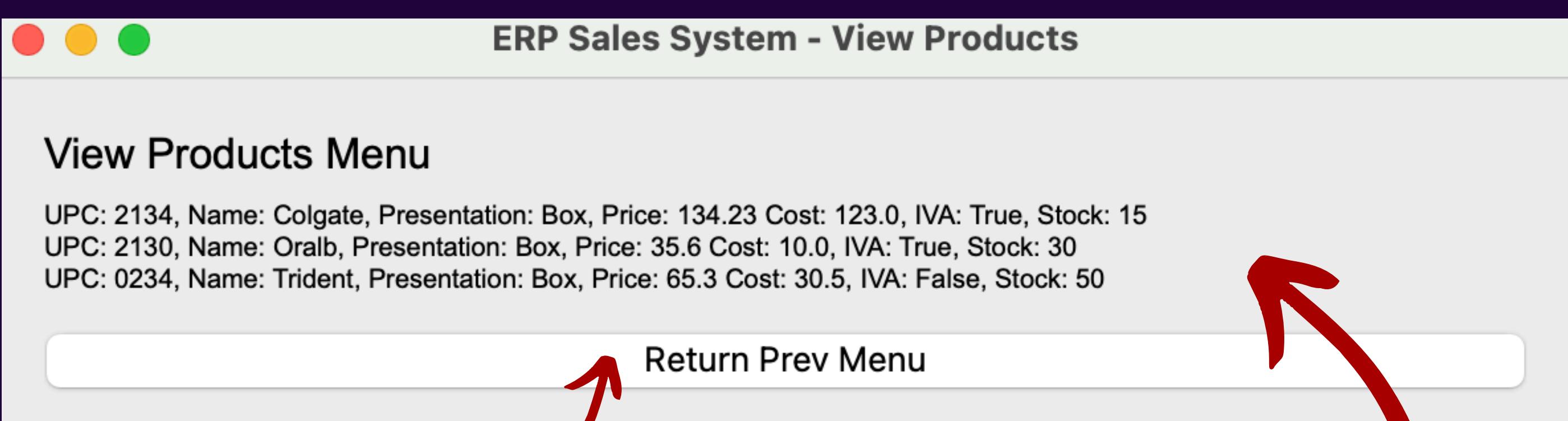
If you are an Admin or Product Manager you will watch this window

## Viewing Products :



Click the second  
button for  
**Viewing  
products**

This window will appear



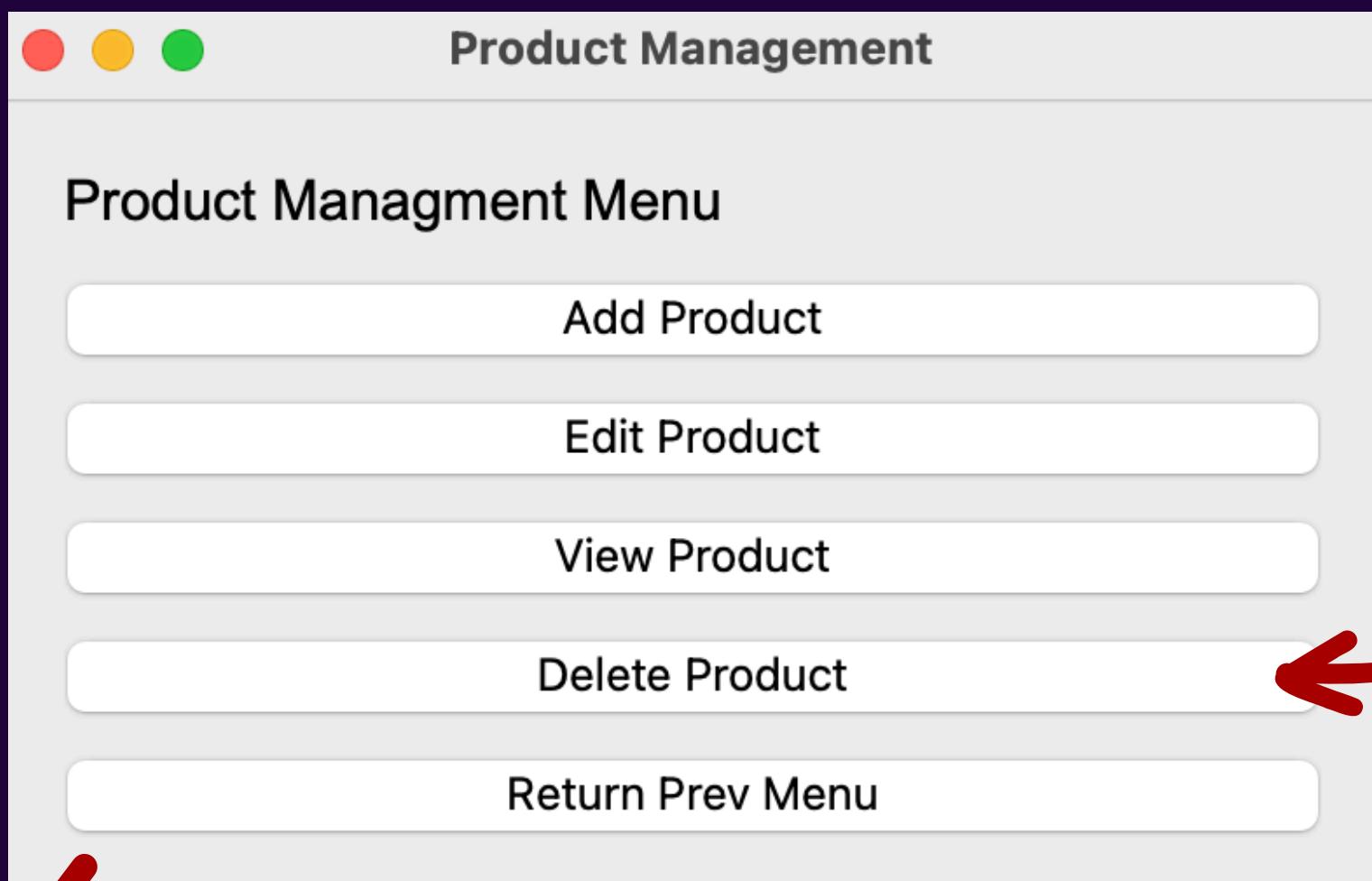
For return to the  
Previous Menu, click the  
last button

You can check all the  
products

# PRODUCT MANAGEMENT MENU:

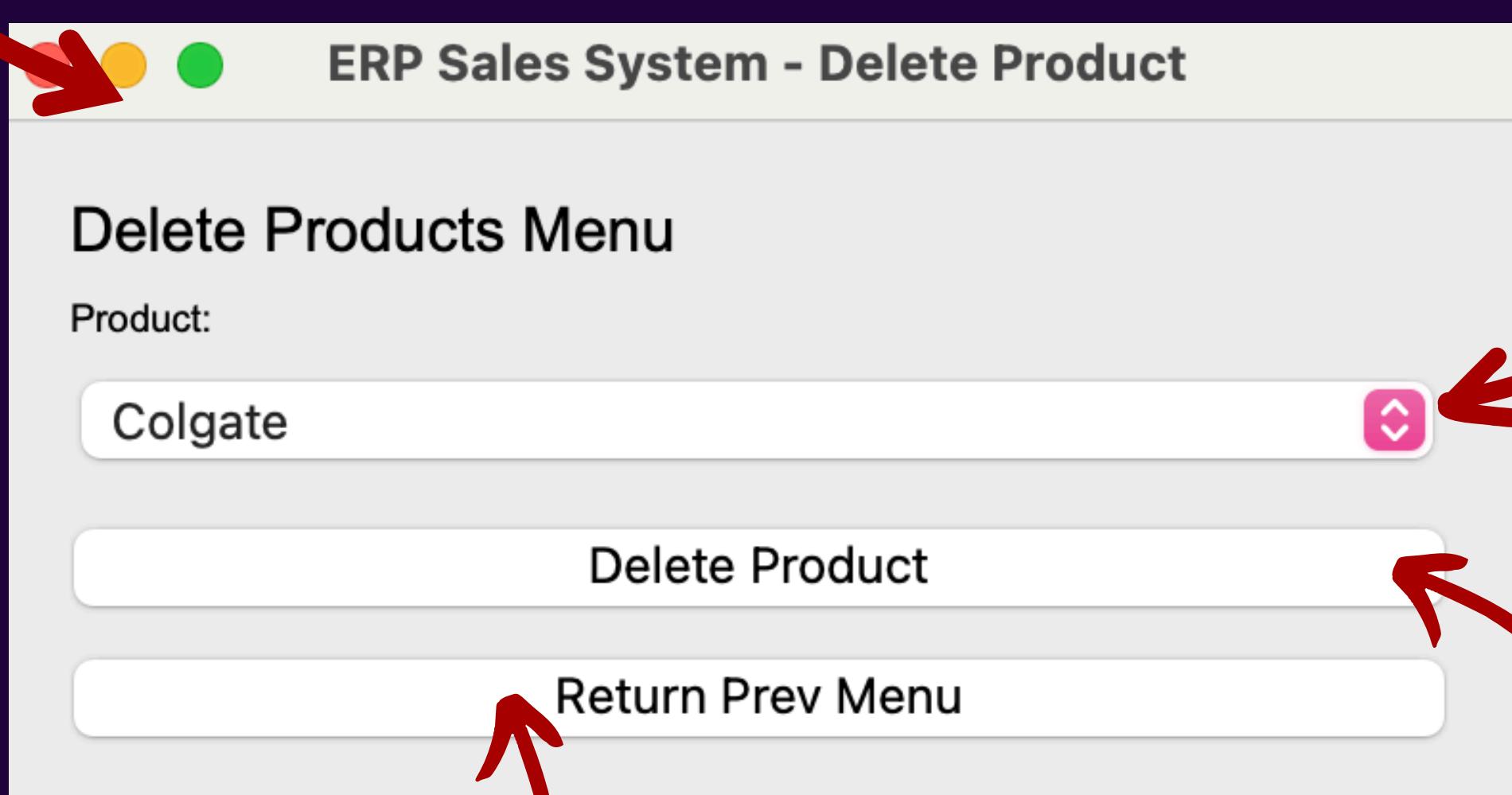
If you are an Admin or Product Manager you will watch this window

## Deleting Products :



Click the second  
button for  
**Deleting  
products**

This window will appear



Choose the  
product you  
want to delete

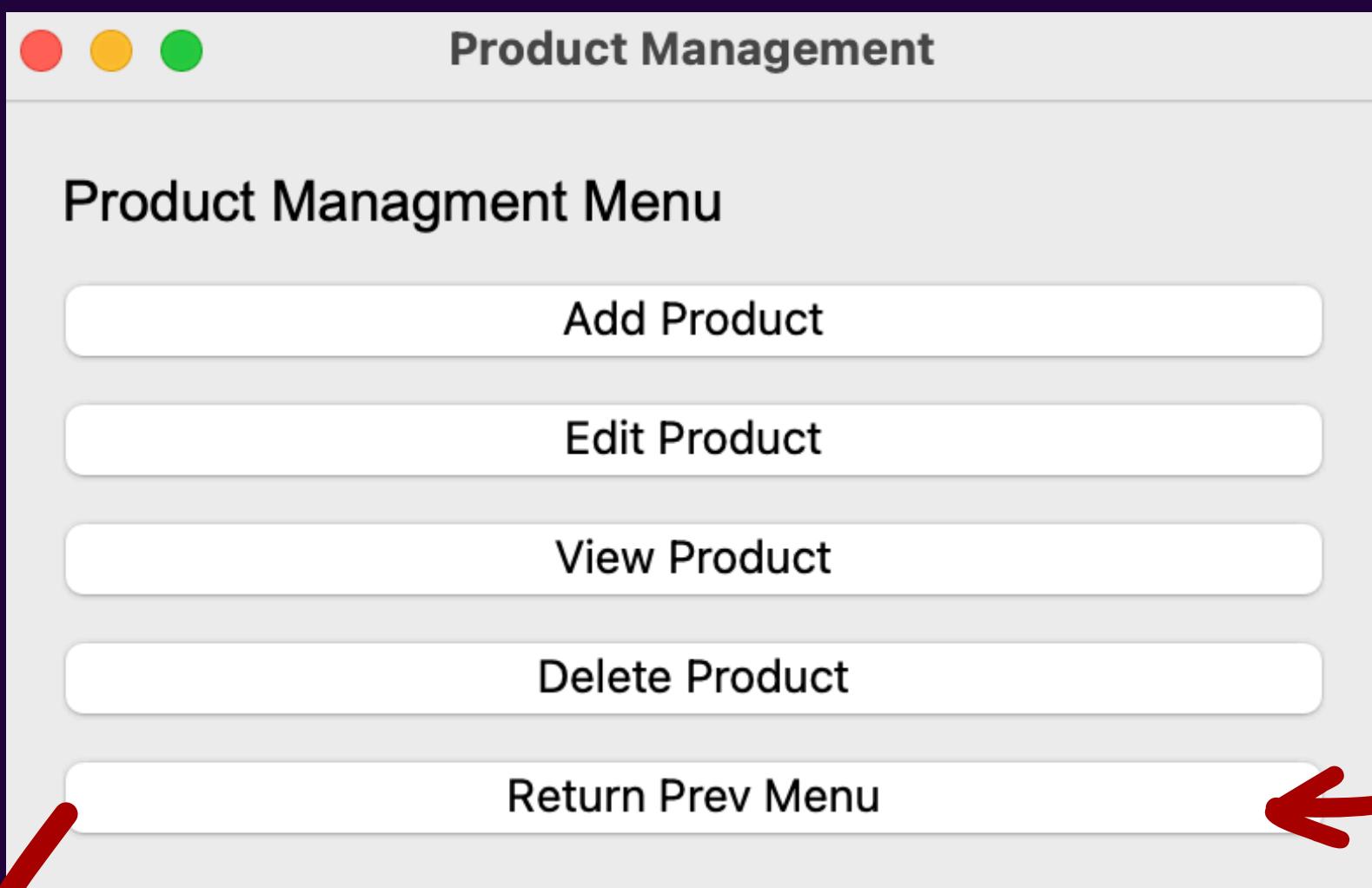
For return to the  
Previous Menu, click the  
last button

Finally, click the button  
“Delete Product”, and  
your product edition  
will be successful

# PRODUCT MANAGEMENT MENU:

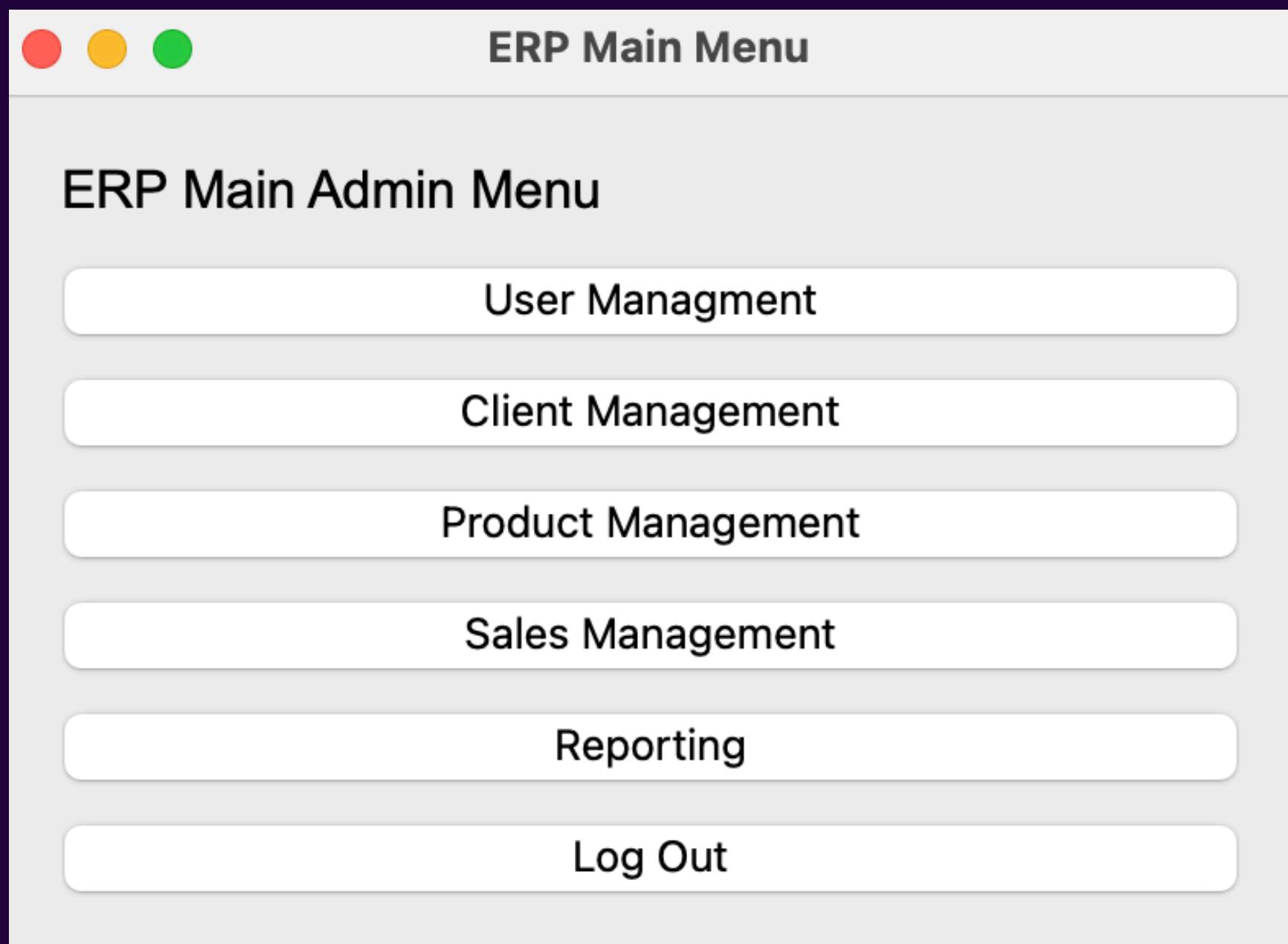
If you are an Admin or Product Manager you will watch this window

Returning to the previous Window:



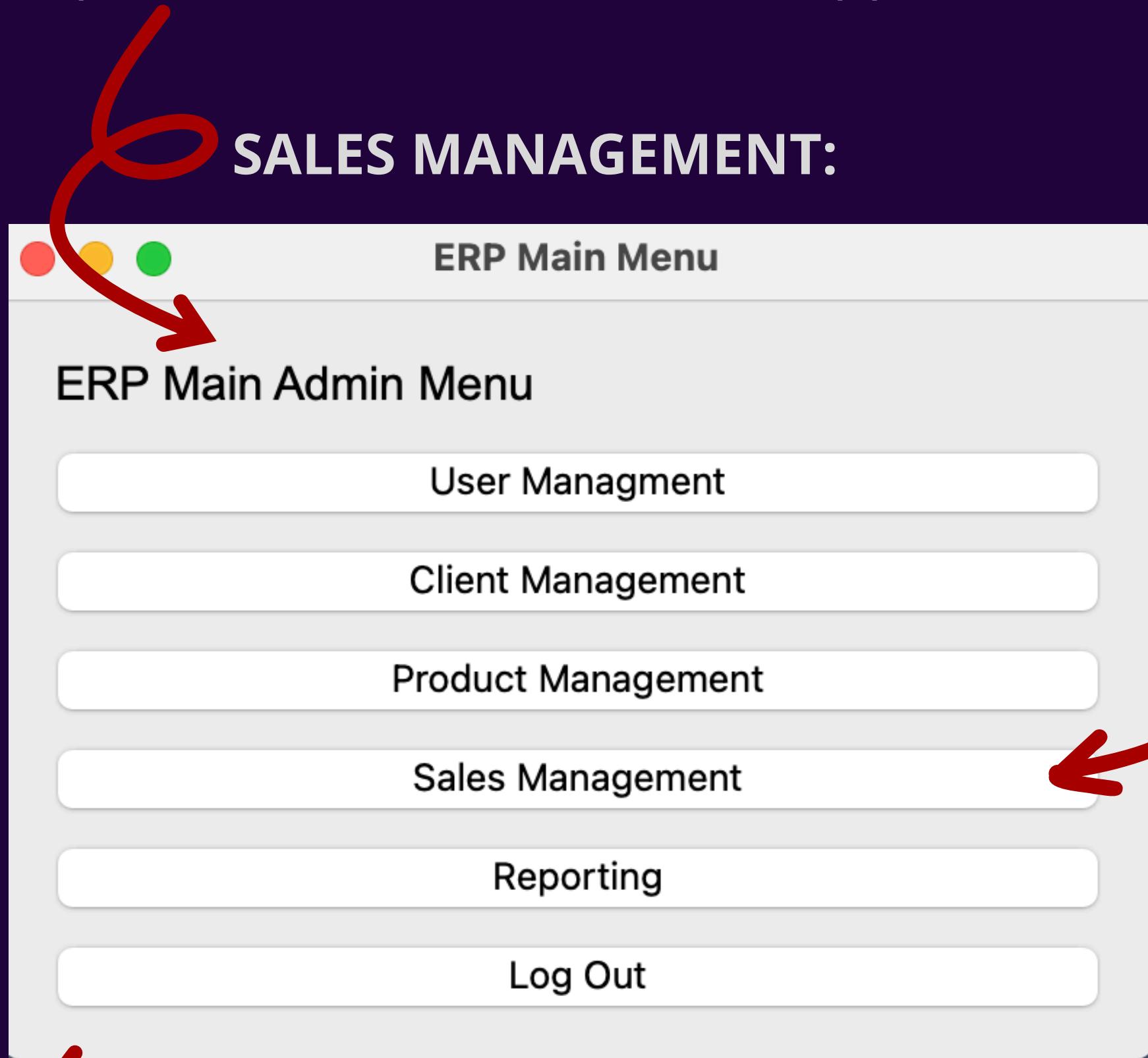
Click the fifth/ last  
button for **Returning  
to the previous  
window** (main menu)

This window will appear



# MAIN ADMIN MENU:

Once you have logged in with your username and password, this window will appear



Click the fourth button for **Sales Management**

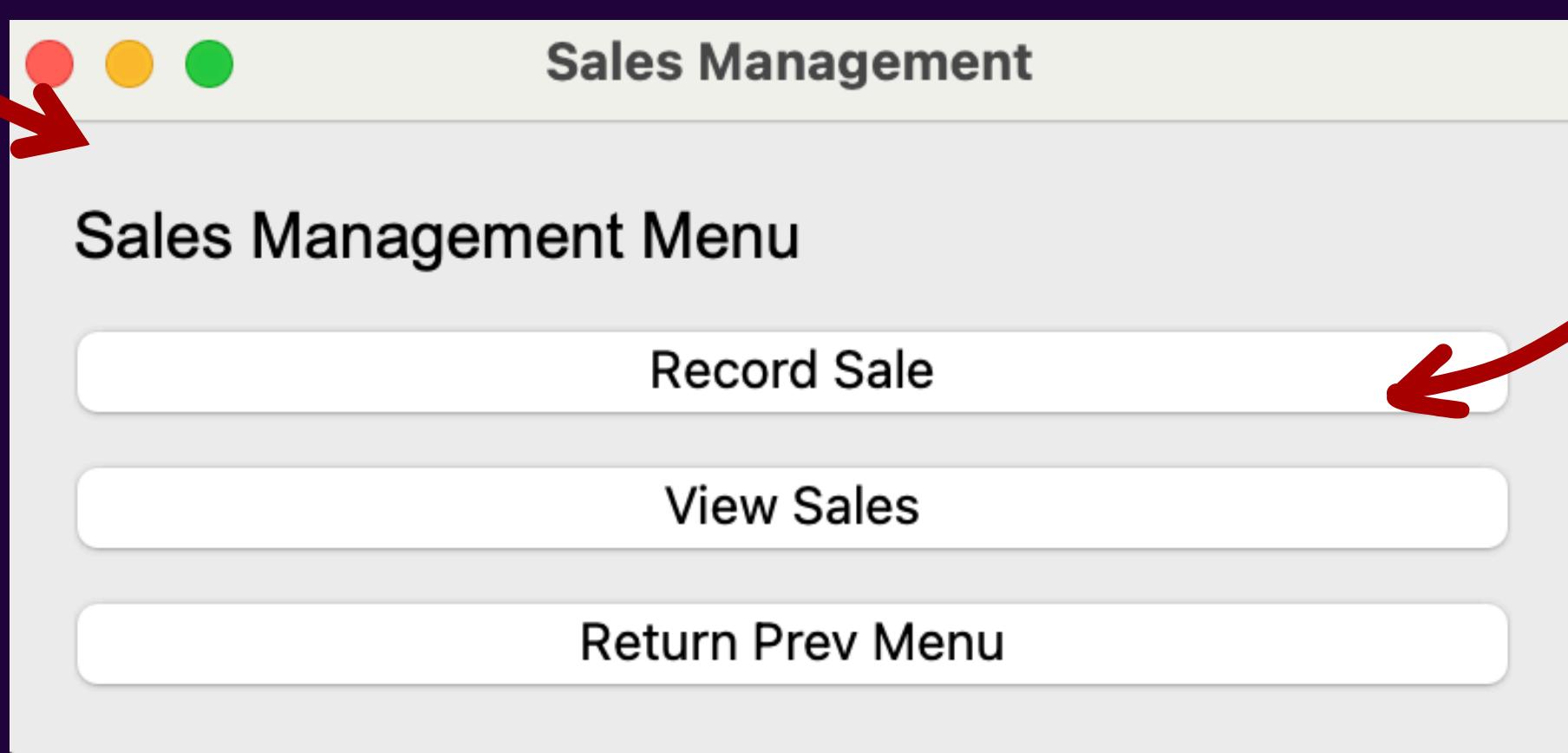
This window will appear



# SALES MANAGEMENT:

If you are an Admin or Sales Manager you will watch this window

## RECORD SALE:



This window will appear

A screenshot of a "Record Sale" window. It has the following fields:

Client ID:

Product:

Quantity:

Price per Unit:

Total Price:

Annotations for the "Record Sale" window:

- A red arrow points from the left towards the "Client ID" input field.
- A red arrow points from the right towards the "Client ID" input field.
- A red arrow points from the left towards the "Product" dropdown menu.
- A red arrow points from the right towards the "Quantity" input field.
- A red arrow points from the left towards the "Price per Unit" input field.
- A red arrow points from the right towards the "Total Price" input field.
- A red arrow points from the bottom-left towards the "Record Sale" button.
- A red arrow points from the bottom-right towards the "Return Prev Menu" button.

Finally, click the button  
"Record Sale", and  
your sale recording will  
be successful

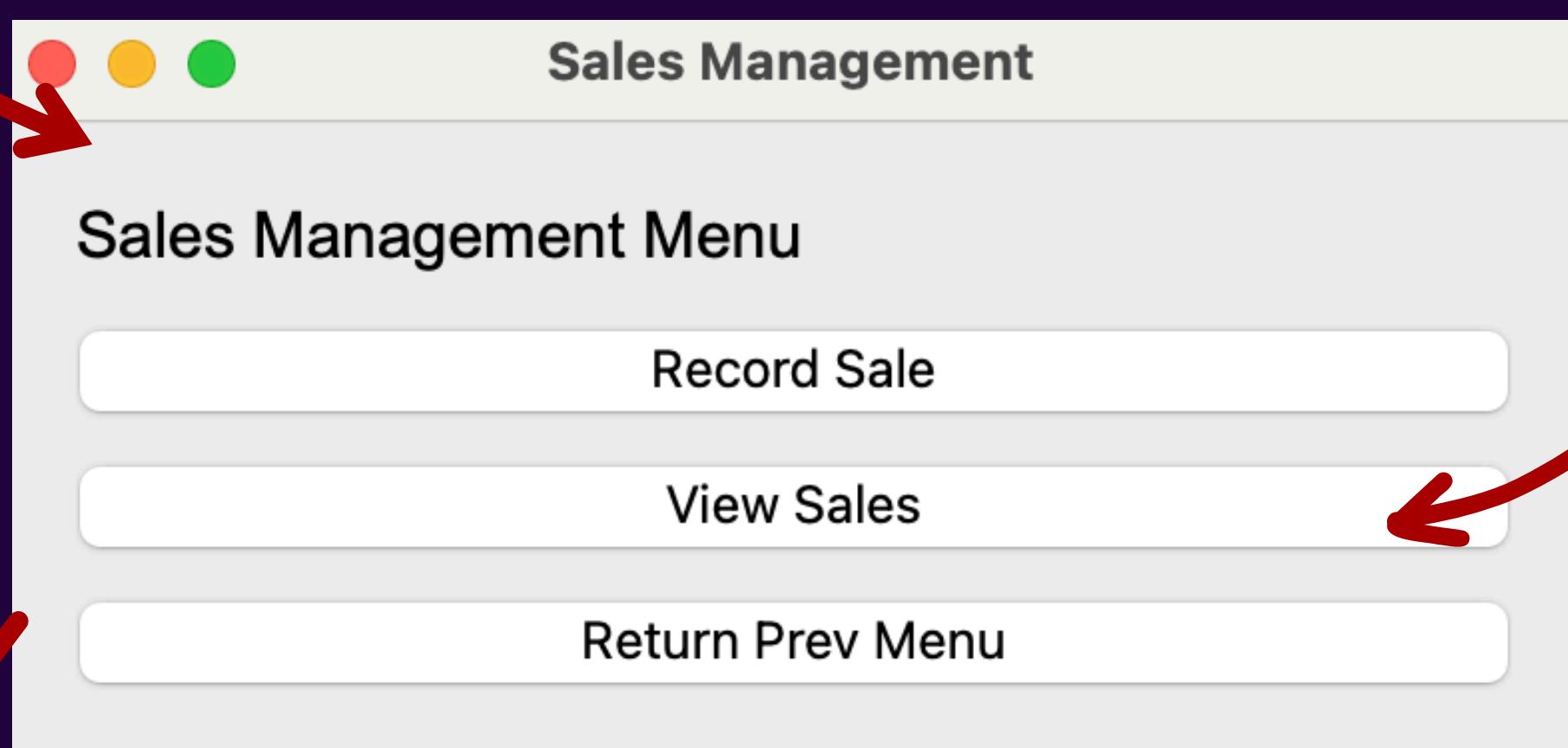
23

For return to the  
Previous Menu, click the  
last button

# SALES MANAGEMENT:

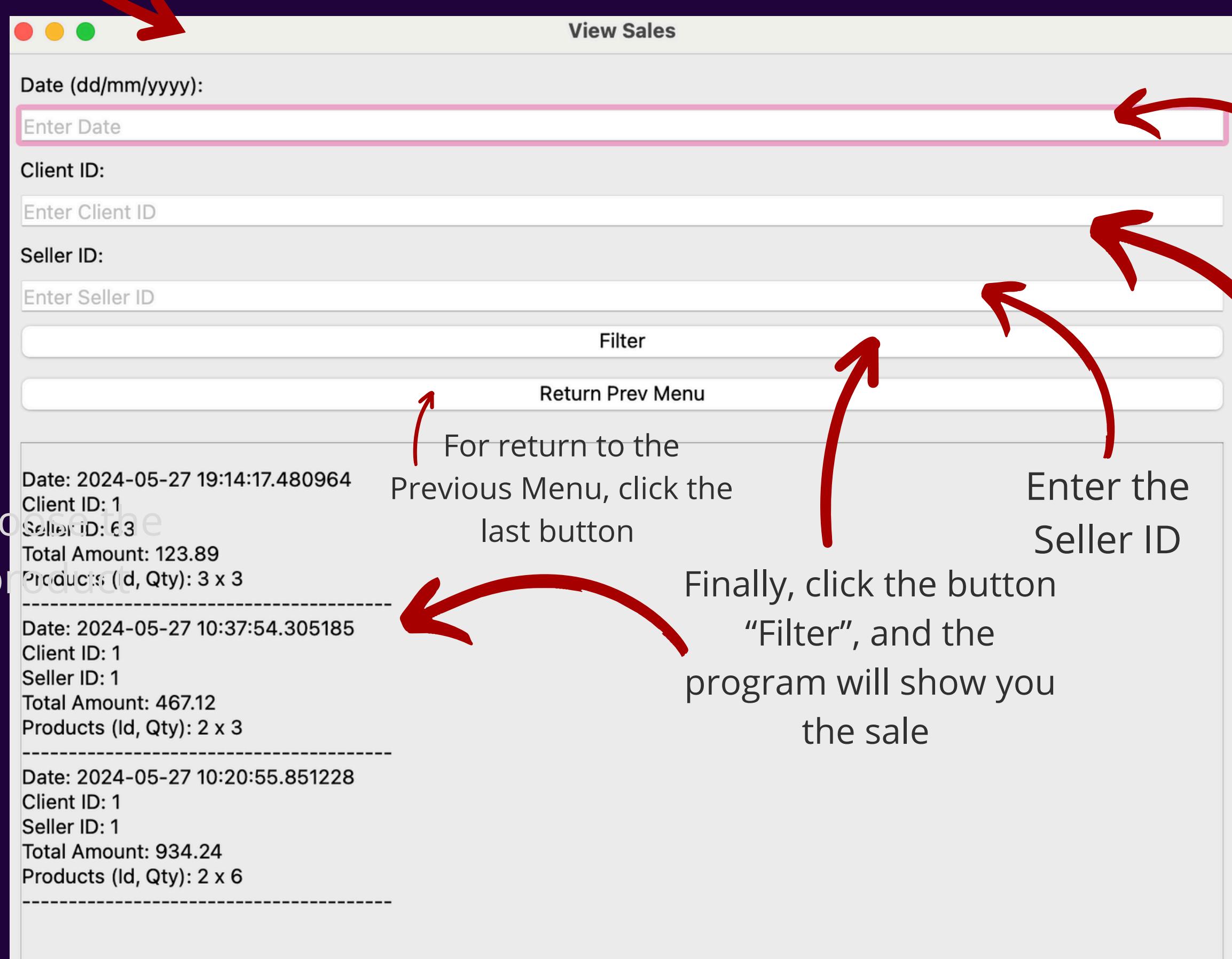
If you are an Admin or Sales Manager you will watch this window

## VIEW SALE:



Click the second button for View Recording

This window will appear



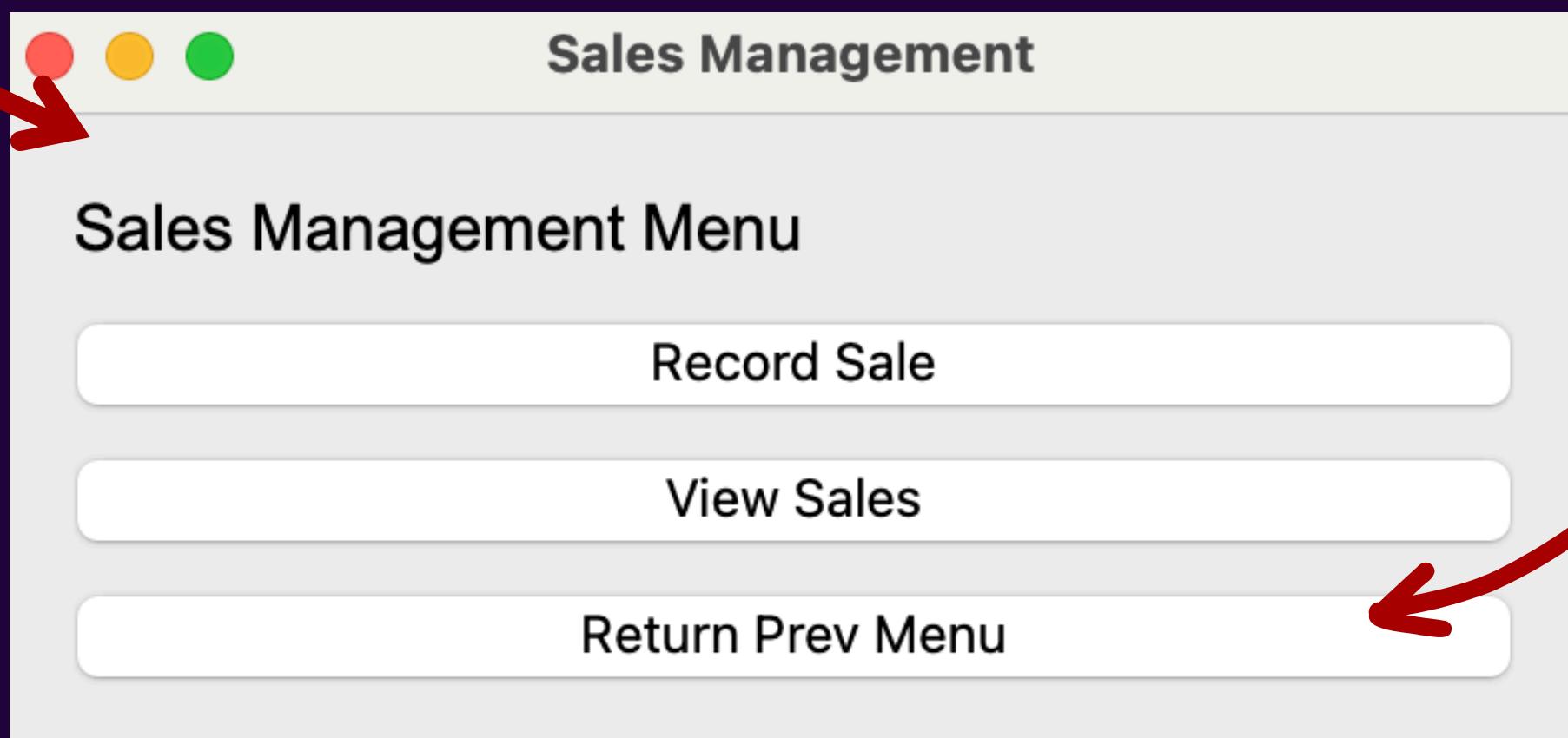
Enter date of the sale  
Enter Client ID

**NOTE:** you can search for the sale with any of the options above, not necessarily all of them

# SALES MANAGEMENT:

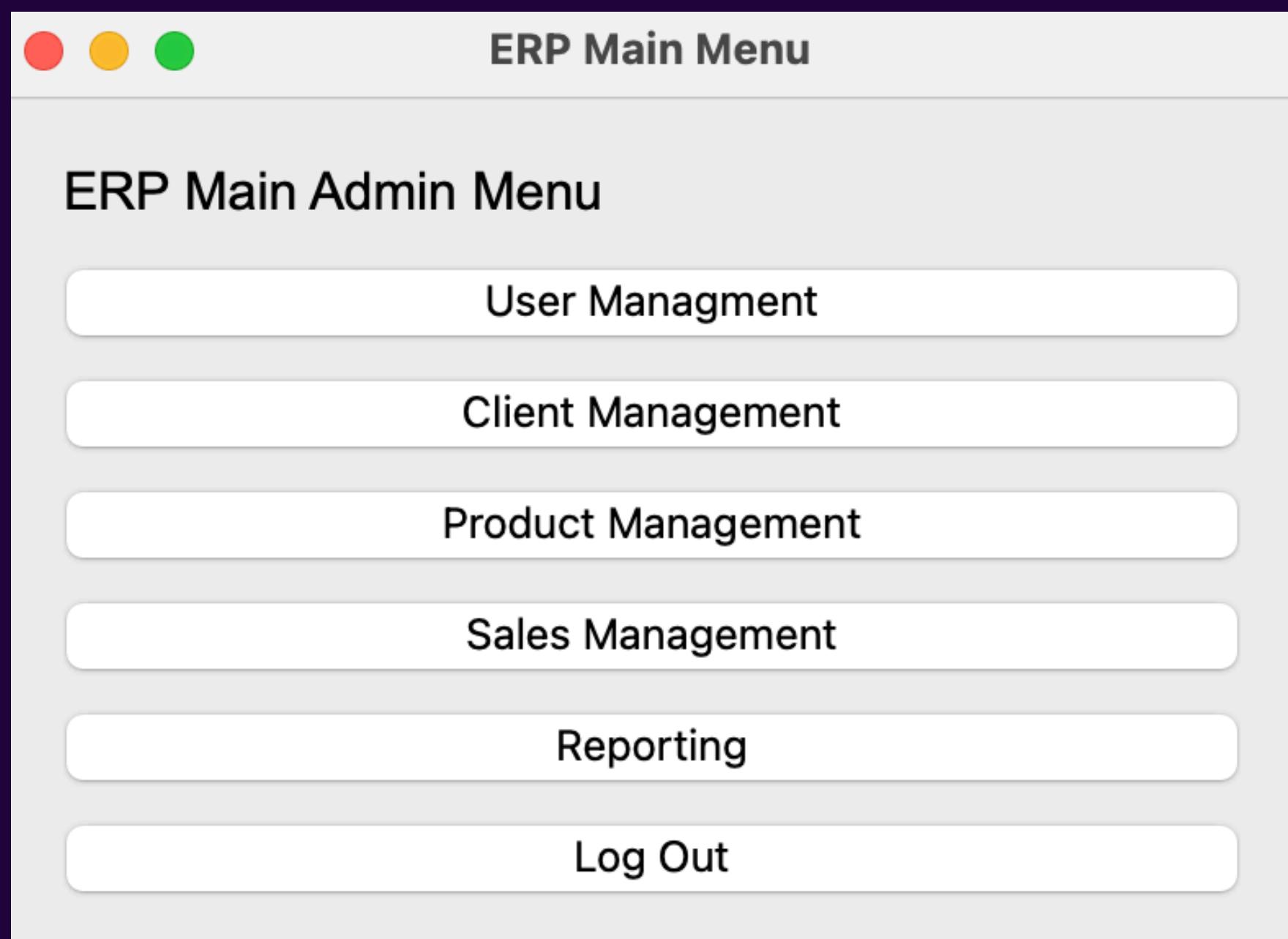
If you are an Admin or Sales Manager you will watch this window

## RETURNING TO THE PREVIOUS MENU:



Click the  
last button  
for  
**returning**  
to the prev  
menu

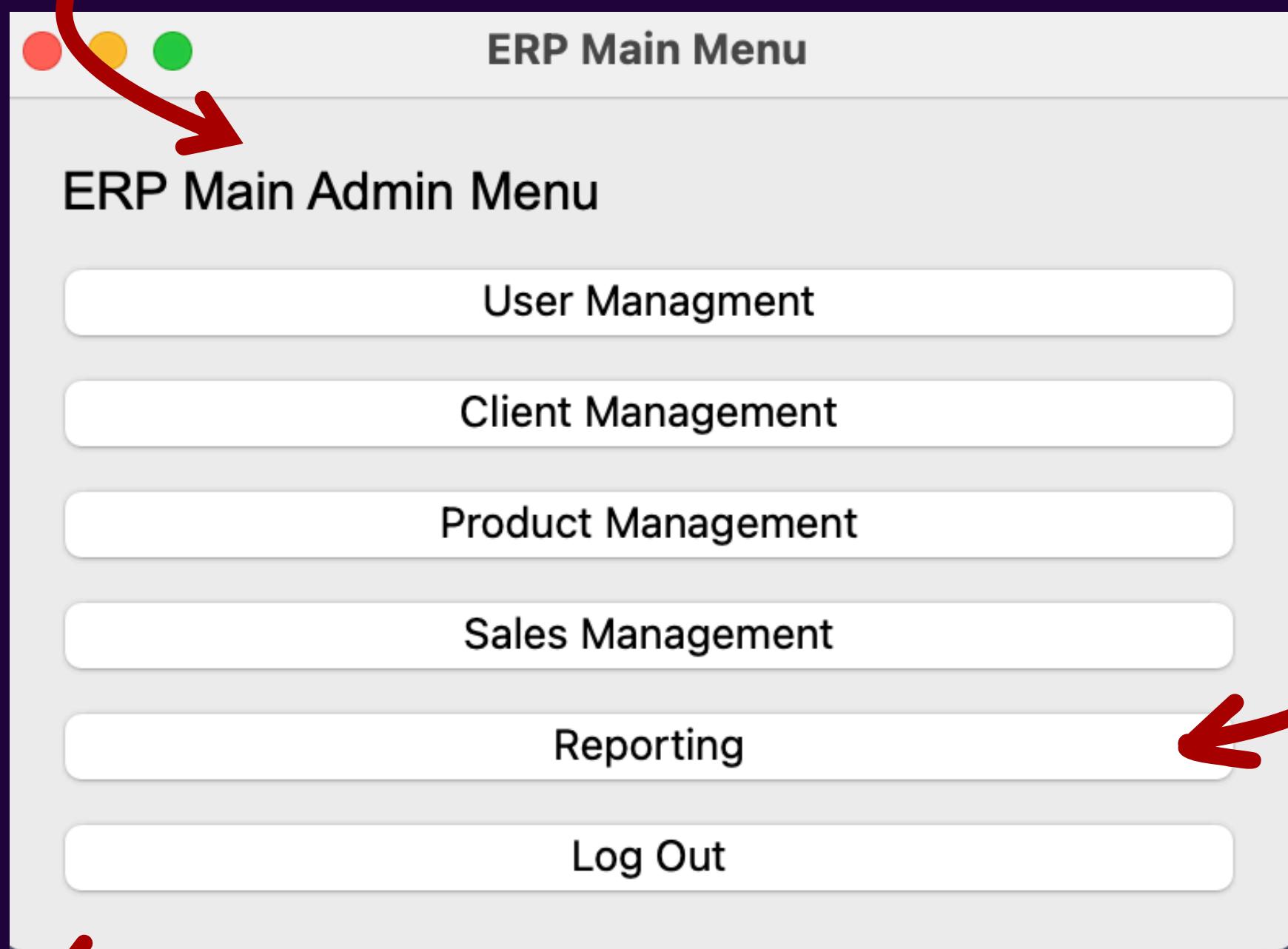
This window will appear



# MAIN ADMIN MENU:

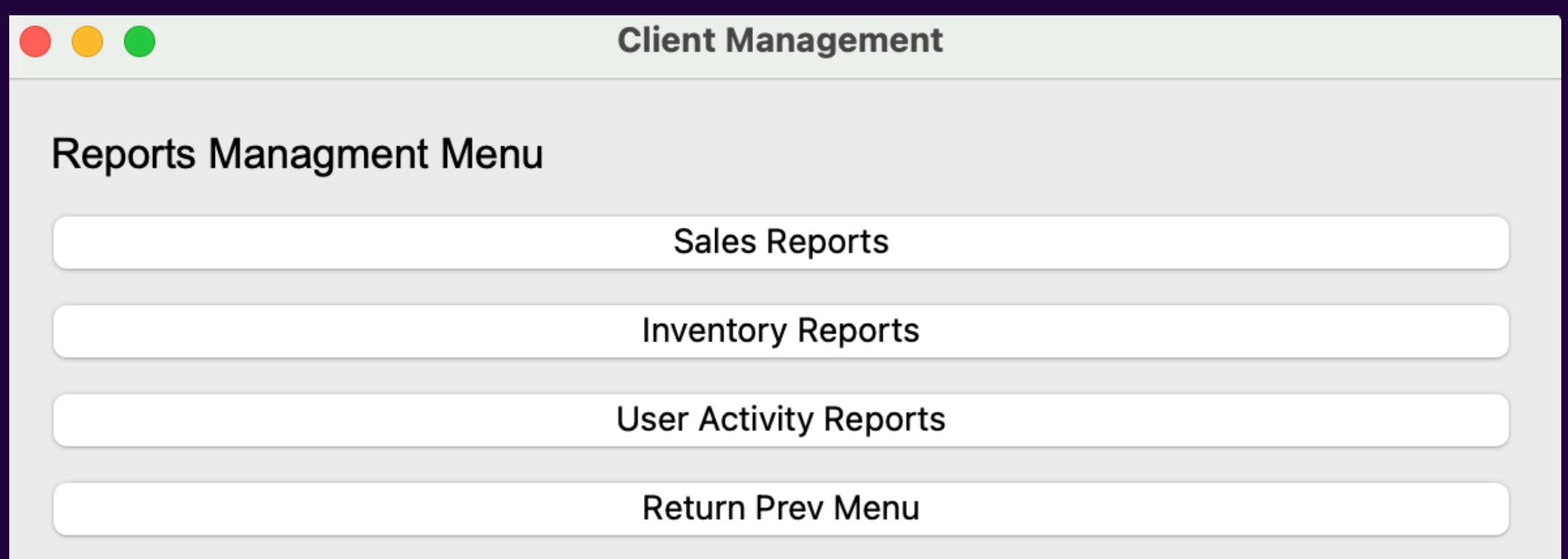
Once you have logged in with your username and password, this window will appear

## REPORTING:



Click the fifth button  
for **Reporting**

This window will appear



# REPORTING:

If you are an Admin you will watch this window



Click the first button for **Sales Reports**

This window will appear

The image shows a 'Sales Main Menu' window. It has five input fields: 'From Date (dd/mm/yyyy)', 'To Date (dd/mm/yyyy)', 'Client ID (optional)', 'Product ID (optional)', and a large 'Generate Sales Report' button. Below these is a 'Return Prev Menu' button. Red arrows point from the left side to each of the four input fields, and another red arrow points from the bottom right to the 'Generate Sales Report' button.

Enter starting date

Enter the product ID  
**(OPTIONAL)**

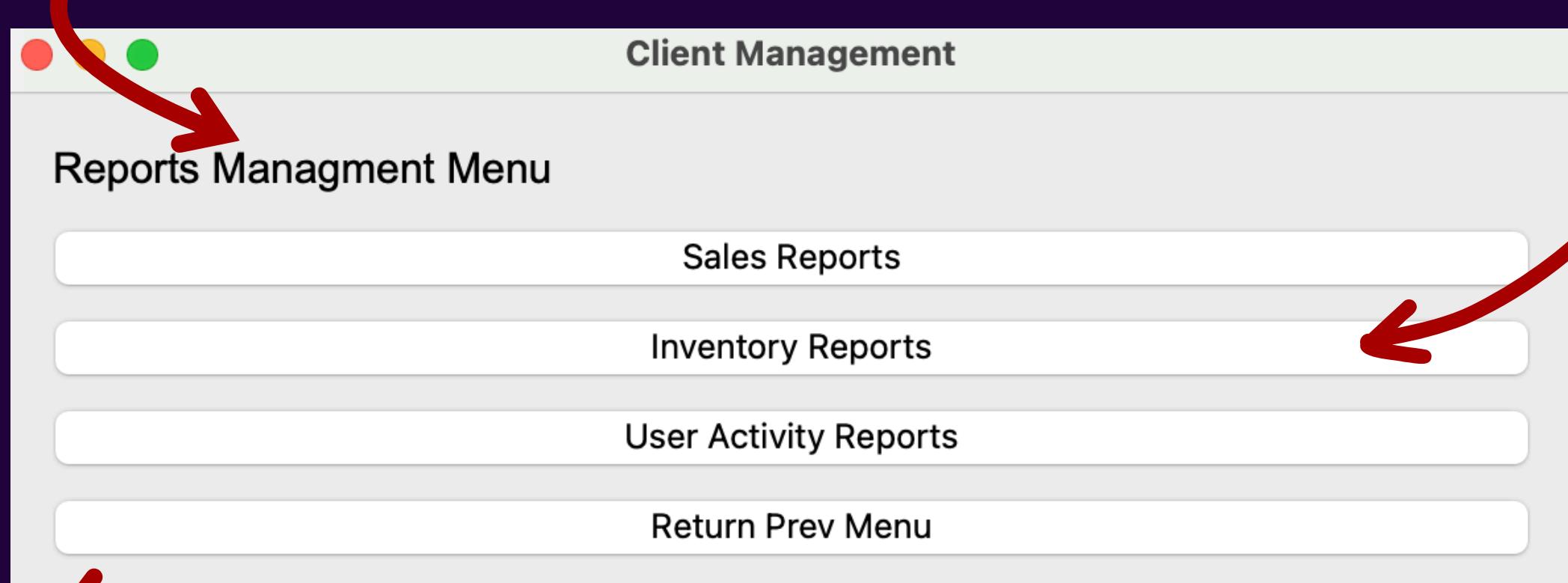
Enter finishing date  
Enter the client ID  
**(OPTIONAL)**

Finally, click the button "Generate Sales Report", and the sale report will be generated

For return to the Previous Menu, click the last button

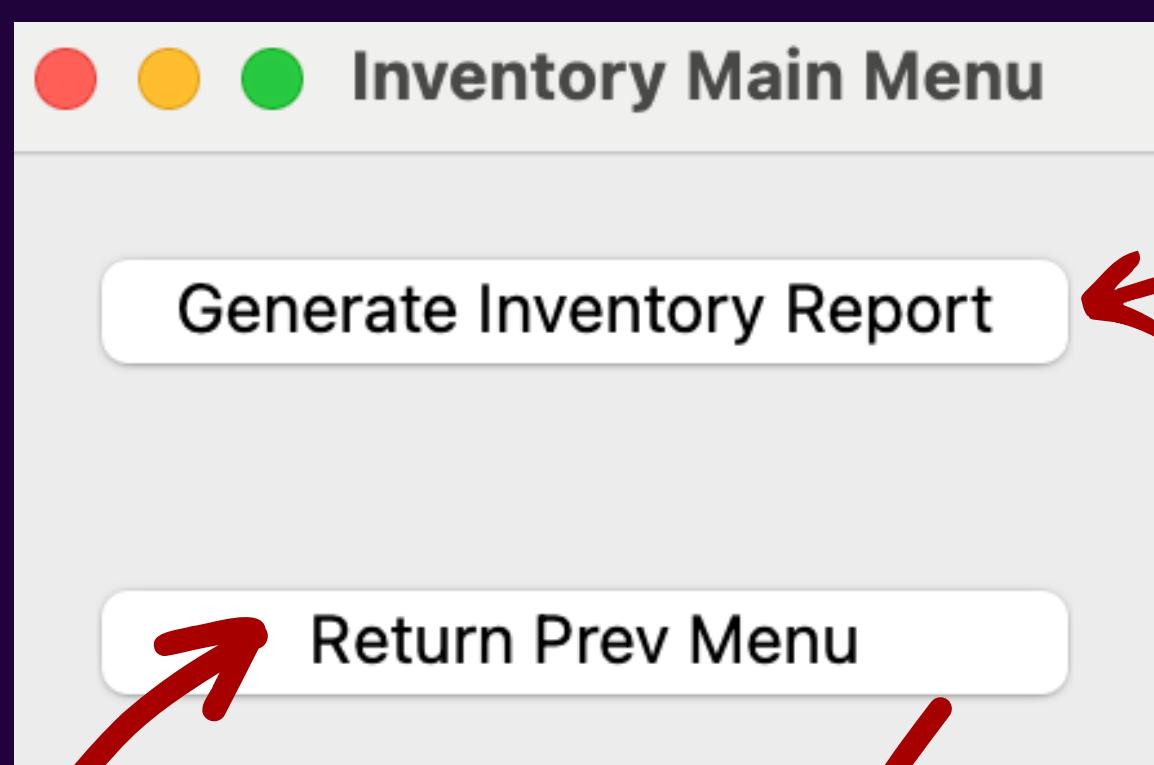
# REPORTING:

If you are an Admin you will watch this window



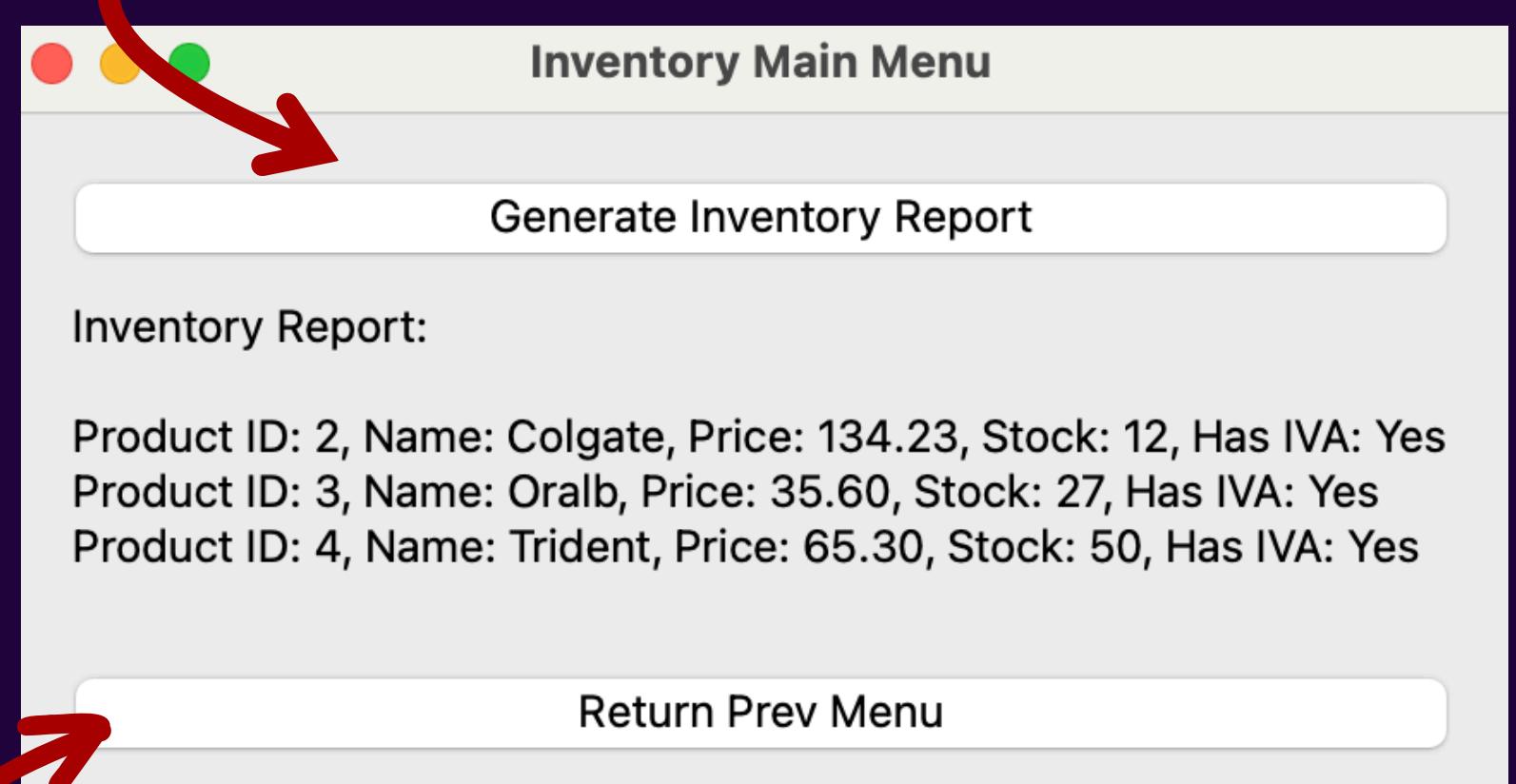
Click the second button for **Inventory Reports**

This window will appear



Just click the first button "Generate Inventory Report"

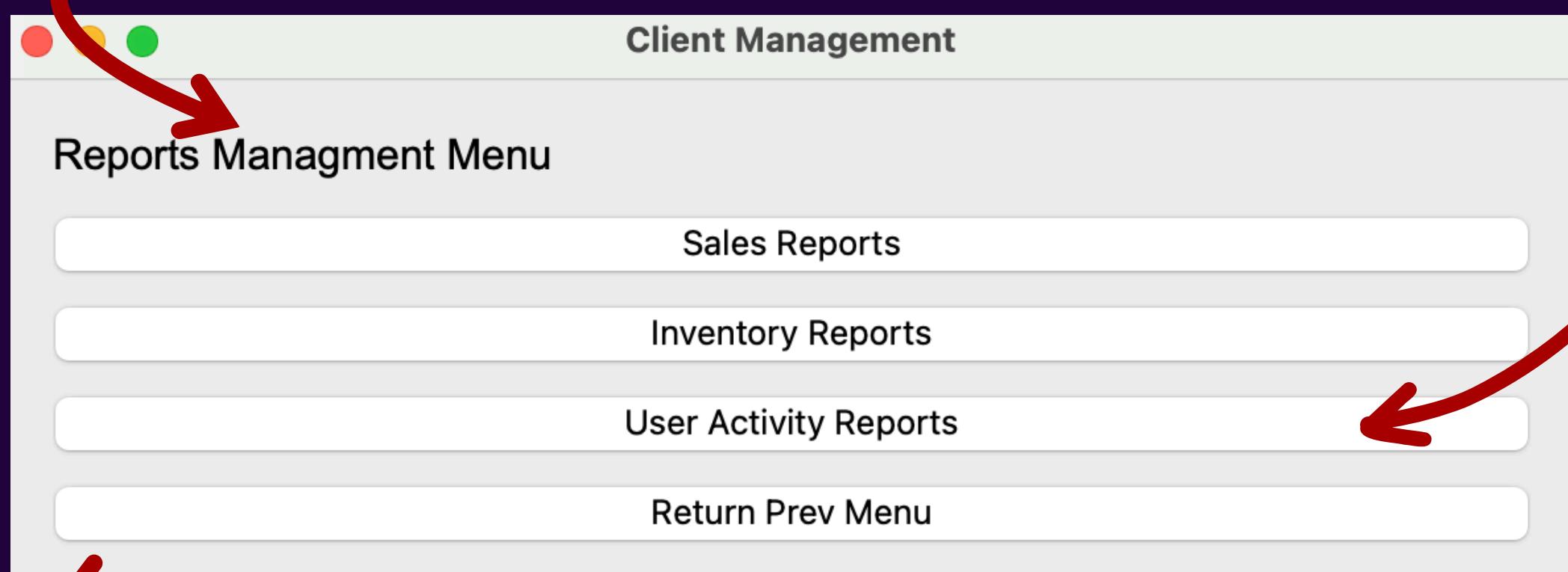
For return to the Previous Menu, click the last button



For return to the Previous Menu, click the last button

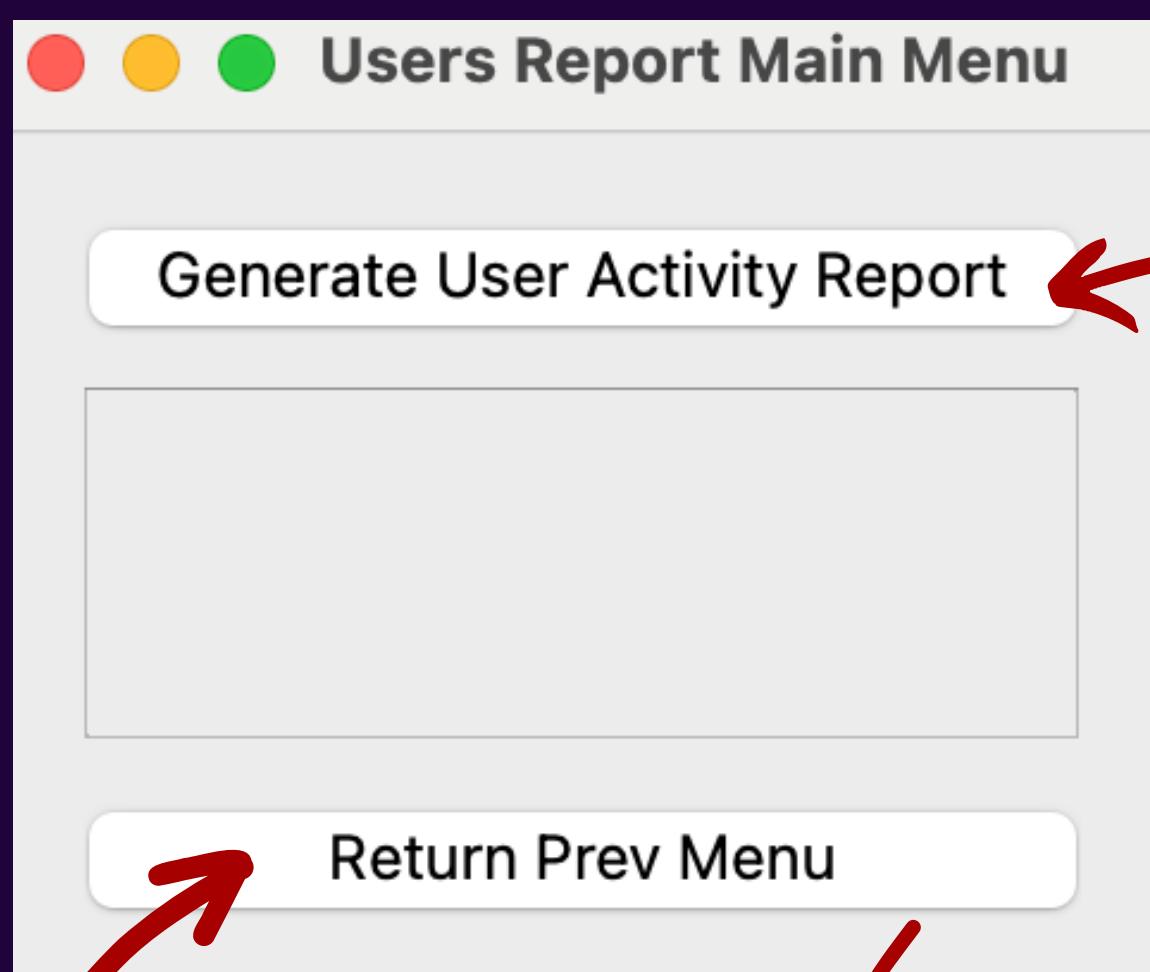
# REPORTING:

If you are an Admin you will watch this window



Click the third button for User Activity Reports

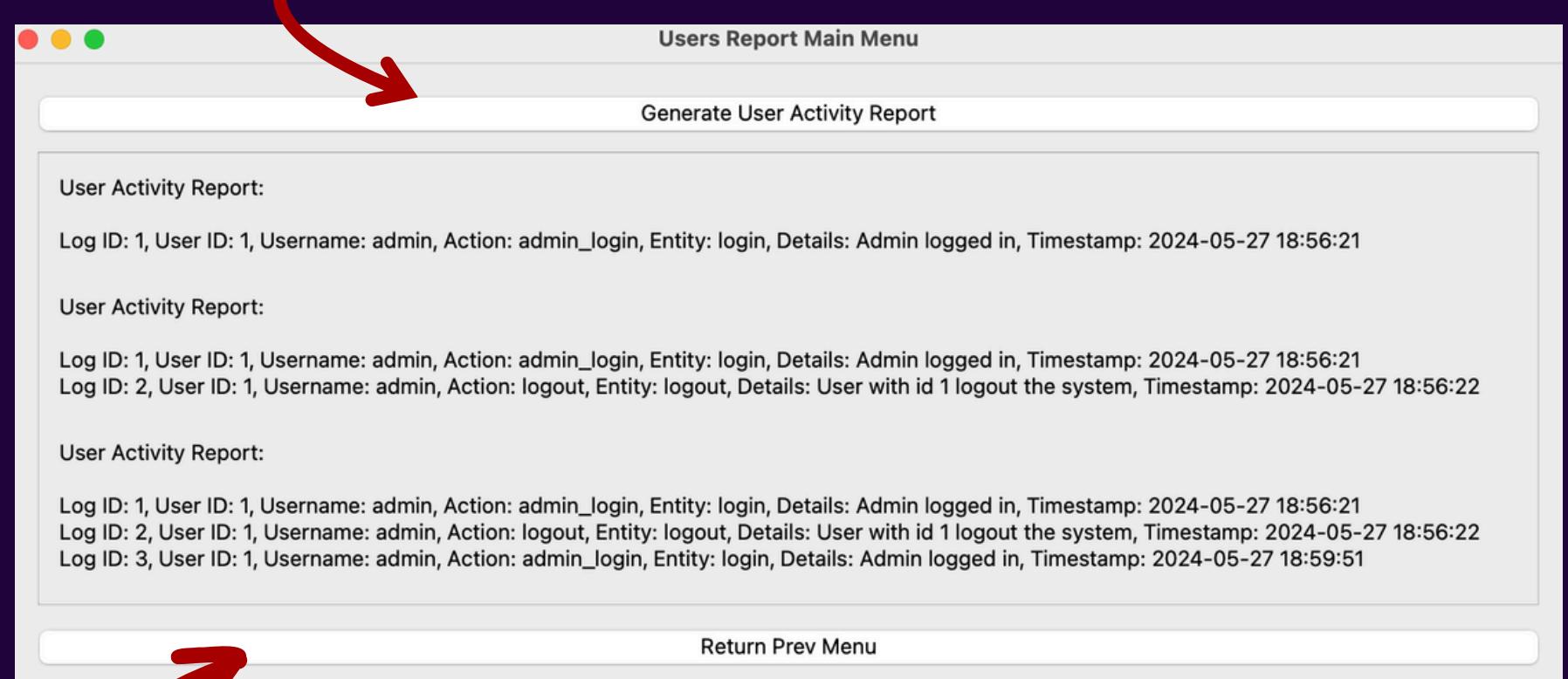
This window will appear



Just click the first button "Generate User Activity Report"

For return to the Previous Menu, click the last button

This window will appear

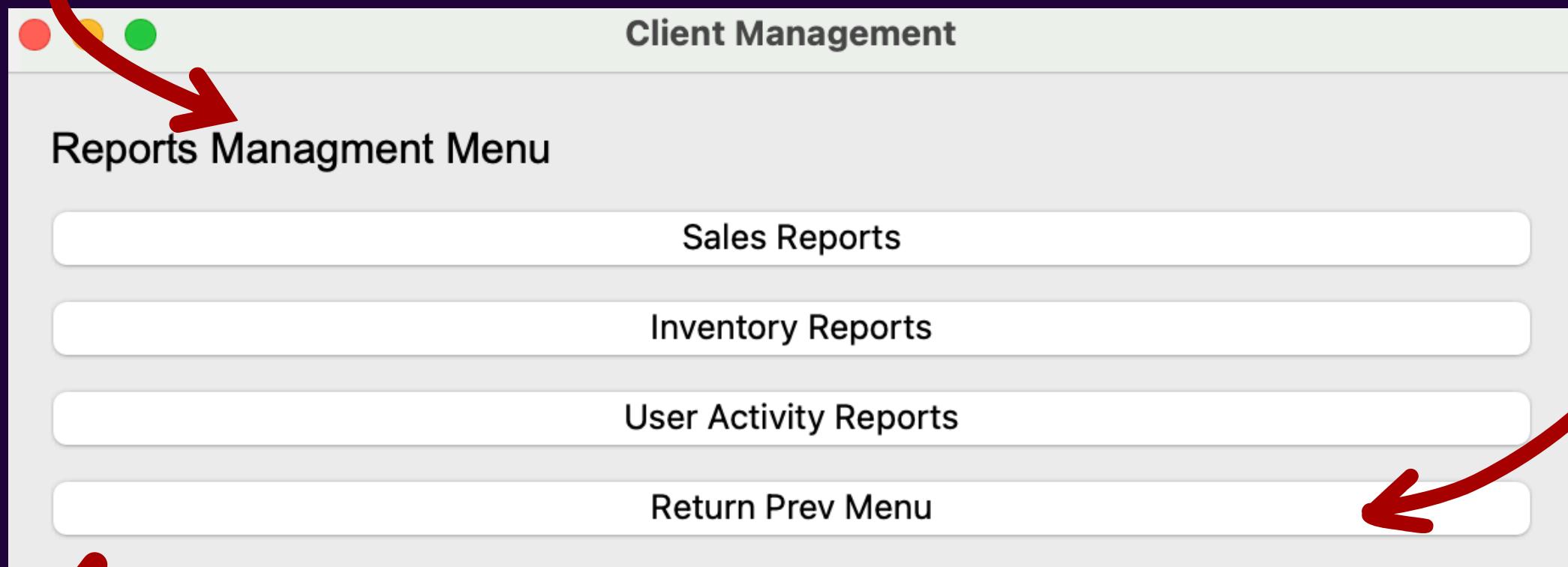


For return to the Previous Menu, click the last button

# REPORTING:

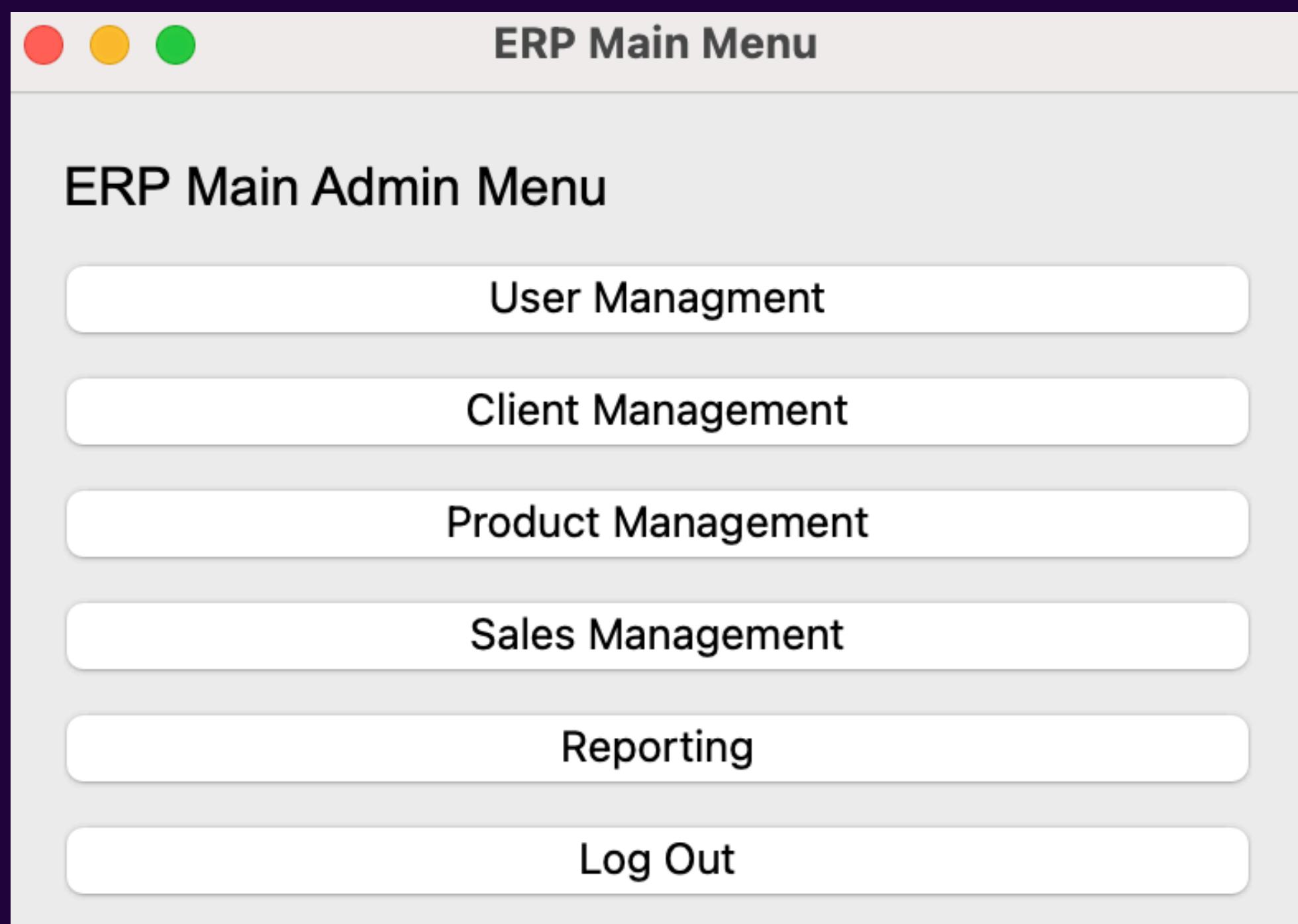
If you are an Admin you will watch this window

## RETURN TO THE PREVIOUS MENU:



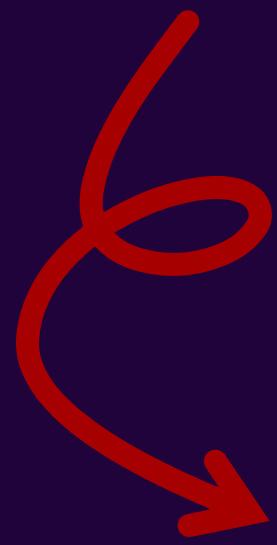
Click the last button for Returning to the previous menu

This window will appear

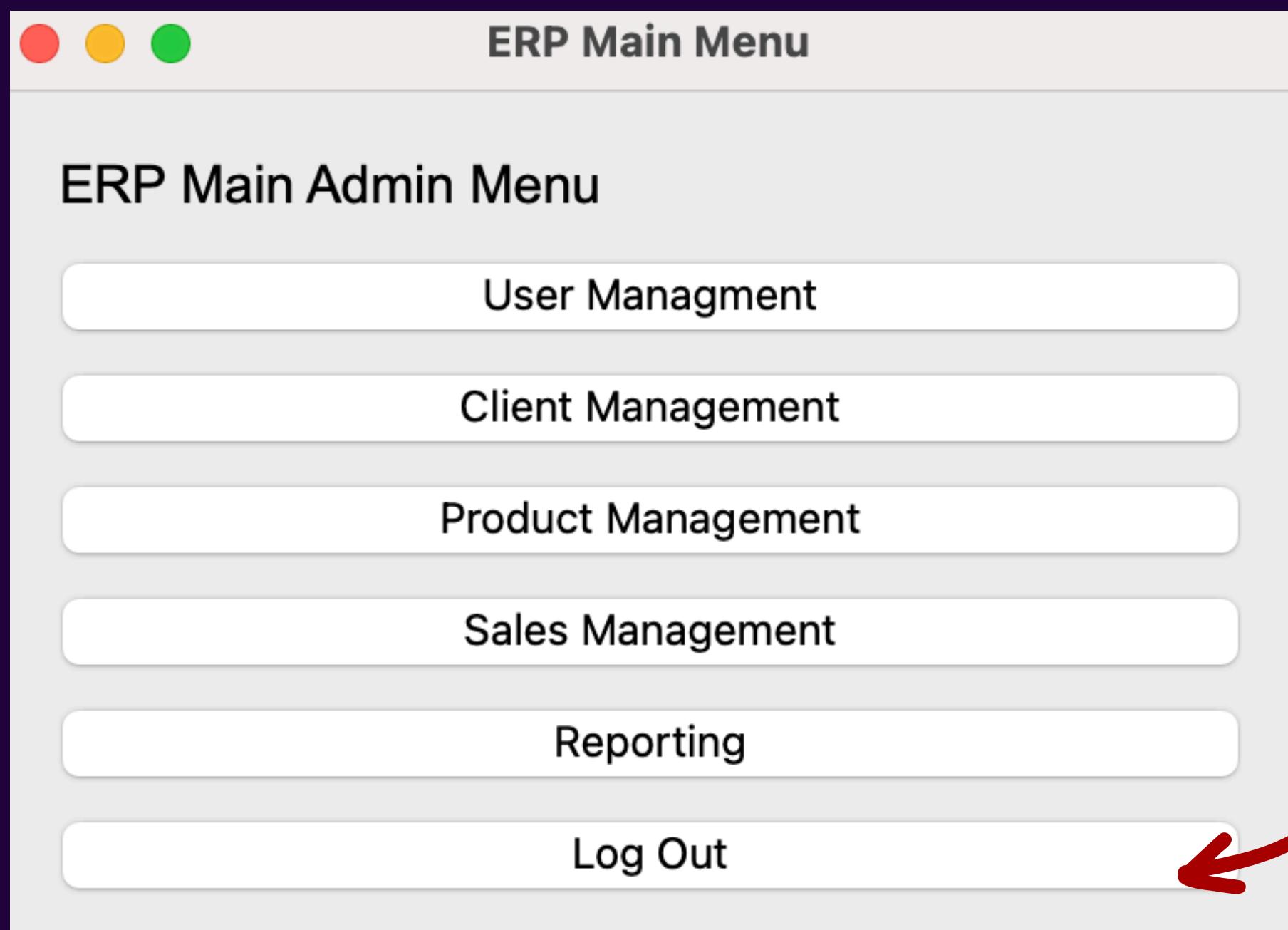


# LOG OUT:

If you are an Admin you will watch this window

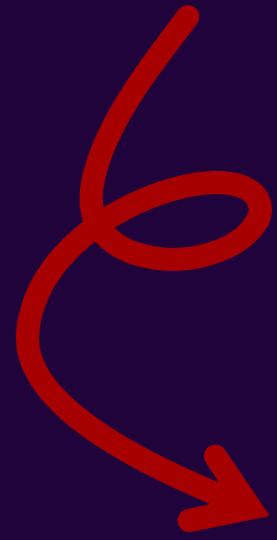


LOG OUT:



Click the  
last button  
for **Login**  
**out of the**  
**program**

**HELLO!, FOR TRY AND ENTER TO THE PROGRAM YOU CAN TRY WITH THIS USERS:**



SQL ▼			
<b>id</b>	<b>username</b>	<b>password</b>	<b>role</b>
1	admin	admin	Admin
63	Rafa	123	Sales management
64	Messi	123	Client management
66	Ceci	12345	Product Management
67	Carlos	12345	HR