User Manual

Boss Tires
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Contents

Using Management Forms

When you open the database, your landing page will have a navigation pane, called *Custom*, on the left side of the database. You will find all the management forms in a self-titled group heading.

Client Intake Form

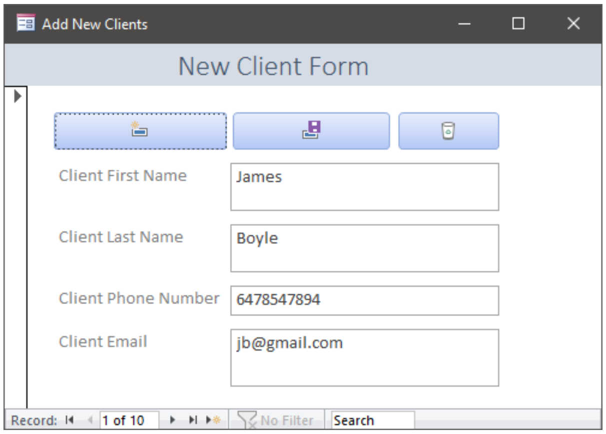

Figure 1: Client Intake Form

The Client Intake Form Is used whenever the business has a new client. It used to add client's information to the client table in the database. It asks you to fill Client First Name, Client Last Name, Client Phone Number, and Client Email. The following steps will show you how to fill and save your Client Intake Form.

1. Double-click the Client Intake Form to open it or right-click on the Client Intake Form and select open.
2. Click on the add record button, this will open a blank form. Fill the form and when you are done, click on the save record button to save your client information.
3. To add another client, *repeat step 2.*
4. When you are done adding and saving client information, click the close button icon to close the Client Intake Form.
5. If you need to edit or delete any client details, use the footer to navigate to the client information that you want to modify. Click on the cell that you would like to modify and make your changes. When you are done editing, click the save record button to save your changes.

Employee Form

The Employee Form is used to add information about employees. Its inputs employee's information into the EmployeeT Table in the database. It asks you to fill Employee First Name, and Employee Last Name. The following steps will show you how to use the Employee Form.

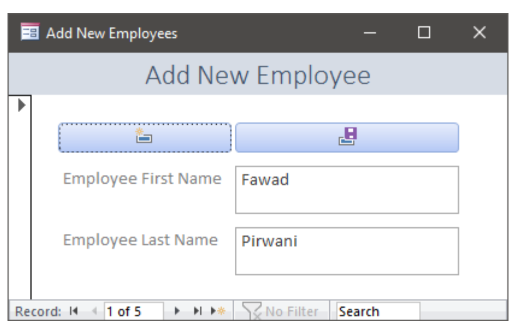

Figure 2: Employee Form

1. Double click the Employee Form to open it or right click on the Employee Form and select open to open the form.
2. Fill the form and when you are done, click on the save record button to save your employee's information.
3. To add another employee's information, click on the add record button to open a blank form, and when you are done filling the form, click the save button to save the information you added.
4. When you are done adding and saving employee's information, click the close button icon to close the Employee Form.
5. If you need to edit any employee details, use the bottom footer in the form window to navigate to the employee information that you want to edit or use the search bar to search for the information you need to edit. Click on the cell that you would like to modify and edit it. When you are done editing, click the save record button to save your changes.

Inventory Intake Form

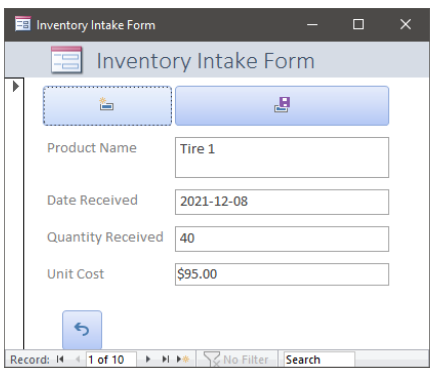

Figure 3:Inventory Intake Form

The Inventory Intake Form Is used to add information about received Inventory upon receiving it and then add the information to the InventoryIntake Table in the database. It asks you to fill in the Product Name, Date Received, Quantity Received, and Unit Cost. The following steps will show you how to use this form.

1. Double-click the Inventory Intake Form to open it or right click on the Inventory Intake Form and select the open option to open the form.
2. Fill the form and note the following:
   - By default, Date Received is set to the day you open the form. If you are filling the form for previous inventory reception, you can change the date by clicking on the cell and adding the correct date.
3. When you are done filling the form, click on the save record button to save your inventory information. To add another inventory intake, click on the add record button and when you are done filling the form, click the save record button.

4. When you are done adding client information, click the close button icon to close the Inventory Intake Form window.
5. If you need to edit any inventory intake details, use the bottom footer in the form window to navigate to the inventory intake information that you want to edit. Click on the cell that you would like to modify and edit it. When you are done editing, click the save record button to save your changes.
6. If you need to delete the last record, click on the undo button.

Invoice Form

The Invoice form is used to add information about the job performed. It saves the information added to the Jobs table in the database. It asks you for information about the job number, job date, service id, customer name, employee name, product name, product quantity, and unit price. After filling all the information, it will automatically calculate the total cost for you. The following steps will show you how to use this form.

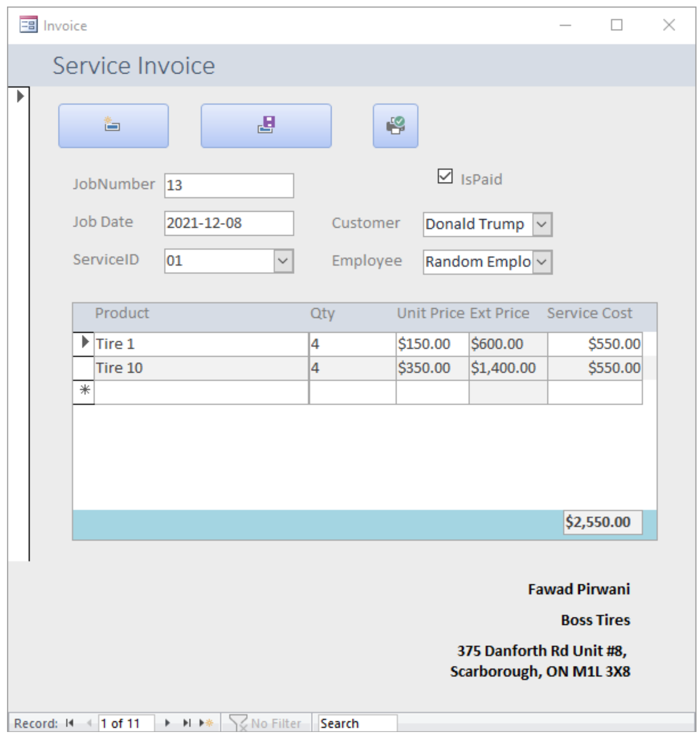

Figure 4: Invoice Form

1. Double click the Invoice Form to open it or right click on the Invoice Form and select the open option to open the form.
2. Fill the form and note the followings
   - Job Number is created automatically.
   - Job Date is set by default to the day you create the invoice, to change it click on the Job Date cell and type the correct date.
   - If you choose the ServiceID, the Service Cost would automatically appear.
   - If you fill Product , Qty, and Unit price the Ext Price would be calculated automatically and then added to the Service Cost to give you the invoice total.

3. When you are done filling the form, click on the save record button to save the invoice. To add another invoice, click on the add record button. When you are done filling the form, click the save record button to save it.
4. After you are done creating your invoices, click the close button icon to close the Invoice Form window.
5. If you need to edit any of the invoice details, use the bottom footer in the form window to navigate to the invoice information that you need to edit. Click on the cell that you would like to modify and edit it. When you are done editing, click the save record button to save your changes.
6. If you need to delete or edit an invoice, check the Jobs Table section under How to Use Invoice and Inventory Tables heading.
7. If you need to print the invoice, click on the print invoice button.

Service Line Extension Form

This form is used to add information about the services offered. It saves all the information filled to a service table in the database. The form will require you to fill information about the service name, service cost, and comments about what is included in the service. The following steps will show you how to use this form.

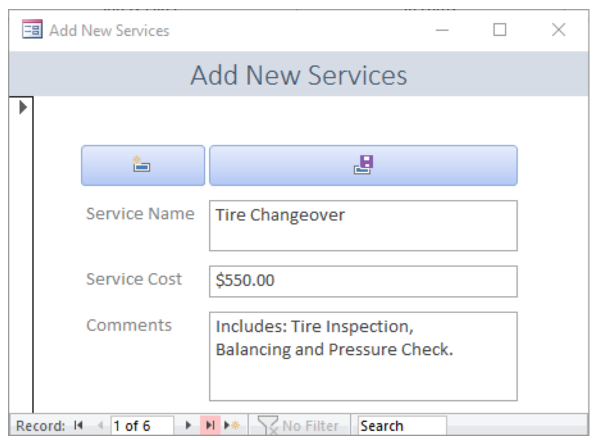

Figure 5: Service Line Extension Form

1. The Service Line Extension Form is found on the navigation pane, called Custom, on the left side of the database. Under Custom you will see 5 different headings (Management Forms, Reports, Invoice and Inventory Tables, Queries, and Supporting Tables) under the Management Forms heading, you will find the Service Line Extension Form.
2. Double click the Service Line Extension Form to open it or right click on the Service Line Extension Form and select the option to open the form.

3. Click on the add record button to open a bank form. Fill the form and when you are done filling the form, click on the save record button to save your added services. To add another service, click on the add record button to open a blank form.
4. After you are done adding and saving the services, click the close button icon to close the Service Line Extension Form Window .
5. If you need to edit any information about the services, use the bottom footer in the form window to navigate to the service detail that you want to edit. Click on the cell that you would like to modify and edit it. When you are done editing, click the save record button to save your changes.

Understanding the Invoice and Inventory Tables

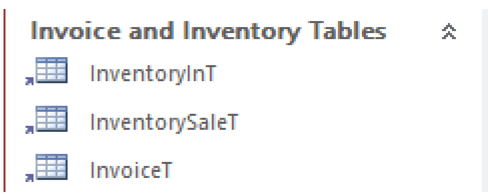

Figure 6: Invoice and Inventory Tables

Inventory Intake (InventoryInT)

The Inventory Intake table is used to keep track of the inventory. It is fed from the Inventory Intake Form. It contains information about product name, the day the product was received, the quantity of the product received, and the unit cost for each product. Deleting multiple records using forms can be tedious, since the form will allow you to delete one field at a time. The Inventory Intake table can be used to delete multiple records or fields at once.

The following steps will show you how to use the Inventory Intake table to delete records and columns.

1. Double click on Inventory Intake table or right click on the Inventory Intake table and choose the open option to open the table.
2. To delete multiple records on the table, select the rows that you would like to delete to highlight them and then right click on those rows and select the delete record option.

- To select multiple rows at once, click on the first row, press the shift key and at the same time select the rows that you would like to delete.

3. To delete any field on the table, select the column that you would like to delete to highlight it and then right click on that column and select the delete field option.

4. Once you are done modifying your table, click on the x beside Inventory Intake to close the Inventory Intake window. All the changes would be automatically saved.

Inventory Sale (InventorySaleT)

The Inventory Sale table is used to keep track of the sales information. The information on this table is coming from the invoice form. This table contains information about the job number, product name, quantity price and the unit price for each product. It can be used to delete multiple records or fields at once.

The following steps will show you how to use the Inventory Sale table to delete records and columns.

1. Double click on the Inventory Sale table or right click on the Inventory Sale table and choose the open option to open the table.
2. To delete multiple records on the table, select the rows that you would like to delete to highlight them and then right click on those rows and select the delete record option.
   - To select multiple rows at once, click on the first row, press the shift key and at the same time select the rows that you would like to delete.
3. To delete any field on the table, select the column that you would like to delete to highlight it and then right click on that column and select the delete field option.
4. Once you are done modifying your table, click on the x beside Inventory Intake to close the Inventory Intake window. All the changes would be automatically saved.

Invoice Table (InvoiceT)

The Invoice table is used to provide information about the performed services. The information on this table is coming from the invoice form. It contains information about the job number, job date, client name, whether the invoice is paid or not, and who performed the service. This table can be used to delete multiple records or columns on the table.

The following steps will show you how to use the Jobs table to delete records and columns.

1. Double click on Jobs table or right click on the invoice table and choose the open option to open the table.
    - To delete multiple records on the table, select the rows that you would like to delete to highlight them and then right click on those rows and select the delete record option.
2. To select multiple rows at once, click on the first row, press the shift key and at the same time select the rows that you would like to delete.

3. To delete any field on the table, select the column that you would like to delete to highlight it and then right click on that column and select the delete field option.

4. Once you are done modifying your table, click on the x beside Jobs to close the invoice table window. All the changes would be automatically saved.

<u>Understanding the Supporting Tables</u>

Figure 7: Supporting Tables

Client Table (ClientT)

The Client Table is used to keep information about the client. This table is fed from the Client Intake Form. It contains information about their first name, last name, client name, phone number, and their email. It can be used to delete multiple records or columns at once.

The following steps will show you how to use the Client table to delete multiple records and columns.

1. Double click on the client table or right click on the client table and choose the open option to open the table.
2. To delete multiple records on the table, select the rows that you would like to delete to highlight them and then right click on those rows and select the delete record option.
   - To select multiple rows at once, click on the first row, press the shift key and at the same time select the rows that you would like to delete.
3. To delete any field on the table, select the column that you would like to delete to highlight it and then right click on that column and select the delete field option.

4. Once you are done modifying your table, click on the x beside Jobs to close the client table window. All the changes would be automatically saved.

Employee Table (EmployeeT)

The Employee Table is used to keep information about the employees. The information on this table is coming from the Employee forms. The table contains information about employee's first name, last name, client name, phone number, and their email. The table can be used to delete multiple records or columns on the table.

The following steps will show you how to use the Employee table to delete records and columns.

1. Double click on the Employee table or right click on the Employee table and choose the open option to open the table.
2. To delete multiple records on the table, select the rows that you would like to delete to highlight them and then right click on those rows and select the delete record option.
   - To select multiple rows at once, click on the first row, press the shift key and at the same time select the rows that you would like to delete.
3. To delete any field on the table, select the column that you would like to delete to highlight it and then right click on that column and select the delete field option.
4. Once you are done modifying your table, click on the x beside Jobs to close the Employee table window. All the changes would be automatically saved.

Service Table (ServiceT)

The Service table is used to keep information about the service offered by Boss Tire. The information on this table is coming from the Service Line Extension Forms. It contains information about the service names, service cost, and information about what is included on each service. This table can be used to delete multiple records or columns.

The following steps will show you how to use the Service table to delete records and columns.

1. Double click on the Service table or right click on the Service table and choose the open option to open the table.
2. To delete multiple records on the table, select the rows that you would like to delete to highlight them and then right click on those rows and select the delete record option.

    - To select multiple rows at once, click on the first row, press the shift key and at the same time select the rows that you would like to delete.
3. To delete any field on the table, select the column that you would like to delete to highlight it and then right click on that column and select the delete field option.
4. Once you are done modifying your table, click on the x beside Jobs to close the Service table window. All the changes would be automatically saved.

Sales Detail Subform (Invoice_Subform)

This Subform is used with the invoice form. It is filled automatically when you fill the product name, product quantity, unit price, Ext price, and service cost in the Invoice Form. Manipulating this subform isn't advised as it feeds information into the invoice form.

Understanding Queries

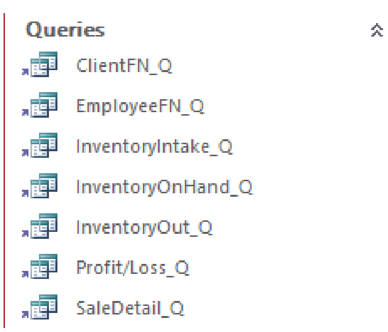

Figure 8:Queries List

The queries built in the Access database are defined around specific search conditions that will assist the user in finding exactly the data they want. Information can be drawn from multiple tables such as the clients, employees, inventory intake, inventory sale, products, and services tables listed in the navigation pane. The query will let you view the records that meet the criteria specified in each table. There are multiple fields organized into records which have all the information within the table relevant to the specific entity. A field is a piece of information relating to a single piece of data. The queries are not directly used within the business function, instead they support the back-end function that supports the forms and reports. They're only used to build the tables and the forms. They work behind the management forms and reports and validate that the data is being processed to the correct supporting tables.

Client Full Name (ClientFN_Q)

The ClientFN Query on the navigation pane allows the user to retrieve concatenated string value of the Client First Name and Client Last Name values from the client table. This allows for a greater ease-of-use as it is fed into the invoice form for tracking. Using this query helps avoid the requirement to memorize or cross-reference ClientID(s).

Employee Full Name (EmployeeFN_Q)

The EmployeeFN query on the navigation pane allows the user to retrieve concatenated string value of the Employee First Name and Employee Last Name values from the client table. This allows for a greater ease-of-use as it is fed into the invoice form for tracking who performs which jobs. Using this query helps avoid the requirement to memorize or cross-reference EmployeeNumber(s).

Inventory Intake (InventoryIntake_Q)

The Inventory Intake query is found under the Queries heading in the Customs navigation pane. This query allows the user to know what product he/she has received, and the quantity of that product. The Inventory Intake query has no direct relationship with the other tables but does have a relationship with the Inventory on Hand query. Furthermore, the information for the two fields in the query is inputted through the inventory intake form under Management Forms.

Inventory on Hand (InventoryOnHand_Q)

Inventory on Hand is a query that updates information on how much inventory is being stocked in and how much inventory is being stocked out. The query consists of four fields which are Product Name, StockIn, StockOut, and QuantityOnHand. As the query is only a backend function for the service invoice form, it will display information based on the service that is provided. The product type, quantity, unit price, ext. price, and service cost are all factors in the service invoice form and once the user processes the invoice as **"IsPaid",** the invoice will process onto the inventory list report. The process will only go through if the service is paid for. The InventoryOnHand query will then display the Product with the “quantity on hand” decreased and the “stock out” as the quantity of the product that was sold. The InventoryOnHand query is only a validator that everything is being processed normally.

Inventory Out (InventoryOut_Q)

The Inventory Out query is another backend function for the database that validates information entered in Invoice Form is being processed and reflected onto the Inventory List Report, Profit/Loss Report, and the Invoice Subform Supporting Table (embedded in the invoice form). The fields in the query are IsPaid, Product Name, and QuantityUsed.

Profit/Loss (Profit/Loss_Q)

The Profit/Loss query processes the information inputted in the Invoice Form and reflects the total profit/loss incurred based on the service provided, whether the service is paid, and the same factors listed above in InventoryOnHand. The total value displayed on the Profit/Loss Report shows the final output after all services are provided and after all expenses are paid off. Therefore, the query serves as a backend function for invoices that are processed and reflected onto the profit/loss report.

Sales Detail (SaleDetail_Q)

The Sales Detail query has the same purpose as the rest of the queries as it processes the information entered onto the Invoice form and reflects the results onto the Profit/Loss Report. The fields Job Number, Product Name, Quantity Used, Unit Price, Extended Price, service cost, and total are used as attributes that are inputted in the service form for each service completed. The supporting table ServiceT distinguishes the service cost for the type of service that is provided and automatically enters the service cost in the invoice form through the sales detail query.

How to Utilize Reports

The reports we created will distribute the summary of the data and provide details about the individual records. The reports in this section will display the report header with the corresponding date and time for when that report is updated. Furthermore, each record has a data source (supporting table or query) that processes the information from the management forms and displays it as the result. Lastly, the fields and record labels are parallel to what the report wants to summarize and automatically inputs the results into the report. The following reports are as follows:

Clients List

The clients list displays the summarized results for the information on the clients which is provided through the Client Intake Form. The client intake form requires information on the client's first name, last name, phone number and email. Once this information is entered, it is processed through the query ClientFN_Q into the Invoice Form. To specify, the lone field from the query ClientFN_Q is used first to gather information, then the information on the field Client Name is looked at. Additional records for new clients will increase the total number of clients. The result is then displayed in the Clients List Report.

Inventory List

The inventory list report showcases a summary of results from the Inventory Intake Form and the Invoice Form. The report displays information on the type of product, the amount of inventory purchased for that product, how much of it is sold and thus the remaining inventory on hand. For the inventory intake form, the information is required on the product name, date received, quantity received, and unit cost. Once the information is entered, the user knows how many new products have been purchased and the quantities for the products on hand. The next step is to click "refresh all" and open the inventory list to view the updated results. For Invoice form, the information on the product or service sold with the quantity and total price is processed by the user. The following step is to click "refresh all" and open the inventory list to view the results based on which products were used for the service provided and the remaining inventory on hand.

Profit/Loss Report

The profit/loss report is the third option under the Reports group. This report entails the cost of goods sold as well as the operating income and profit/loss values. In many ways, this report is the master report as it uses all tables for its source. The queries used as the back-end function to process this information correctly are the Profit/Loss_Q, SaleDetail_Q, and the Inventory queries. Each query selects specific fields in records from supporting tables such as the Invoice and Inventory Tables, the ServiceT and Invoice_Subform table and combines the data in the database to collectively impute the results to its respective fields in the Profit/Loss Report. The total operating income is the sum of the extended price, the total costs of goods sold is the sum of the total cost, and the total profit/loss is the difference calculated between the operating income and total costs of goods sold.