SalesFlow System Documentation

1. Project Overview

SalesFlow is an AI-assisted trend tracking and sales logging system built specifically for Filipino small business owners. It simplifies data entry, provides insights through a friendly AI assistant named Seraphina, and brings real-world usability to micro businesses such as sari-sari stores, milk tea stalls, salons, and home bakers.

2. Objectives

- Simplify the daily task of logging sales, especially for frequent small-value entries. - Empower users with visual insights about their sales performance. - Provide optional AI-generated trend analysis. - Design with small business chaos in mind—especially non-inventory, fast-paced setups. - Offer a beautiful, simple, responsive interface. - Build flexibility for future enhancements without complicating the current user experience.

3. System Users

- Targeted at single-person small business owners. - No support for enterprise users, accountants, or multi-user accounts. - Users manage their own categories, products, and trends.

4. Key Modules

1. Login & Registration 2. Dashboard (home) 3. Sales Entry 4. Product & Category Management 5. Analytics & Trends (Graphs + Seraphina's AI reports) 6. System Settings (Profile, Theme, Timezone) 7. Backup & Restore 8. Recycle Bin (Soft-deleted entries) 9. Quick Buttons / Product Shortcut Page (for fixed menus)

5. Data Entry Flow

- Frequent or batch entries supported. - Custom product names allowed (e.g., "■5 snacks pack"). - Quick input form on dashboard: amount, item name, category, payment method. - Optional: Quick buttons for fixed menu items. - Entries reflected instantly in daily table and trend summaries.

6. Product & Category System

- Fully user-defined products and categories. - Optional subcategory support via parent_id. - Categories grouped in dropdowns. - No inventory tracking required (not suitable for sari-sari detailed inventory).

7. Analytics & Seraphina (AI Assistant)

- Seraphina provides friendly, focused AI summaries (best sellers, trends). - Analytics graphs include: - Peso-based trends - Quantity sold - Weekly and monthly summaries - Users can use this to reflect on their business performance visually.

8. UI Components

Main Pages: - Dashboard (daily table, add form, graphs) - Products Page - Sales Table (with filter/sort) - Settings Page - Product Shortcut Page (for fixed menus) - Recycle Bin Sidebar Buttons: - Dashboard - Products - Analytics - Settings - Shortcuts - Recycle Bin

9. Backup & Export

- Export data in app-readable format. - Future: import from Excel (CSV). - Useful for migrating data across accounts/devices.

10. Development Stack

- Frontend: HTML, CSS, JS (Bootstrap) - Backend: PHP - Database: MySQL (XAMPP for local dev) - AI: KoboldAI API - Deployment: Localhost with Cloudflare tunnel for live demo

11. Limitations

- Not for enterprise users. - No advanced authentication (but possible later). - One user per account. - No deep inventory tracking. - Import/export limited to system format only.

12. Real-world Relevance

This system was inspired by the developer's mother—who runs a home-based cake business with unclear earnings due to scattered discounts and poor tracking. SalesFlow aims to spark awareness for small biz owners about where their earnings go, and how to spot trends—even without complicated accounting.

13. Final Notes

SalesFlow is flexible, realistic, and proudly Pinoy in its understanding of small business hustle. It adapts to chaos rather than trying to control it. Every screen, button, and behavior is designed to feel natural to someone running a business with their own two hands.