I. General

1. Log in to the Web-based System

a. Login

1. Input user email and password.
2. Click the “Eye” icon to view/unview user password.
3. Click Login.

2. Change Password

a. Change Password with email verification

1. From the login page, click Forgot Password.
2. Enter the user account’s email and Send. *Note: Emails that are not inside the database (not added by the admin) is invalid.*
3. Get the verification code from Gmail.
4. Enter the verification code and click Confirm.
5. Create a New Password.
6. Re-type the new password to confirm.
7. Click Save to successfully change the password.
8. Click Cancel to invalidate the password change.

3. View Current User Account Details

1. From the website’s top-right corner, click the user profile photo.
2. Click My Account.

4. View Help Module

1. From the website’s top-right corner, click the user profile photo.
2. Click Help.

5. Log out from the Web-based System

1. From the website’s top-right corner, click the user profile photo.
2. Click Logout.

II. Modules

1. Navigating Dashboard

a. Dashboard Summary

1. The whole page shows the daily and monthly summary of sales, expenses, transactions, and customers.
2. Scrolling down will show the recent transactions of the day.
3. Beside the Recent Transactions table is the list of employees in attendance.

2. Navigating Point of Sales

a. How to add an order: Refill Order
   1. Click the "Refill" button on the top right.
   2. Select the type of water. (Example: Mineral.)
   3. Choose the item by selecting which container to use, and click "Add Order". (Example: Water Bottle) *Note: Each item or container has set liters. The price will vary by the container used and the quantity of the items.*
   4. On the "Add Order" form, fill out the quantity of the order.
   5. Click "Save" to add the item on the "Order Summary" form.
   6. Click "Cancel" to invalidate the changes.

b. How to add an order: New Order
   1. Click the "New" button on the top right.
   2. Select the type of water. (Example: Alkaline)
   3. Choose the ordered item and click "Add Order". (Example: Water Bottle)
   4. On the "Add Order" form, fill out the quantity of the order.
   5. Click "Save" to add the item on the "Order Summary" form.
   6. Click "Cancel" to invalidate the changes.

c. How to add an order: Others (Faucets, Caps, Tubes, Plugs)
   1. Click the "Others" button (Grey button right beside the "New" button).
   2. Choose the item from the selection and click "Add Order".
   3. On the "Add Order" form, fill out the quantity of the order.
   4. Click "Save" to add the item on the "Order Summary" form.
   5. Click "Cancel" to invalidate the changes.

d. Deleting an item from the order
   1. On the "Order Summary", click the red "X" button beside the item to be deleted. Note: There will be <u>NO confirmation prompt</u>. Once the X button is clicked, the item will be deleted.
   2. In case deleting an item by mistake on the "Order Summary", add the order again.

e. How to place an order
   1. On the "Order Summary" form, choose whether the customer is

ordering through walk-in, for delivery, or for pick-up.

2. Click “Place Order” on the “Order Summary” form.
3. On the “Payment Details” form, fill out all the necessary details.
4. The Customer Name is set as “Guest” by default. Guest customers are walk-in customers that do not order regularly.
5. If the customer is a regular and exists on the system’s database, click “Guest” and choose the customer’s name from the list.
6. To add a new customer on the customer list as a regular, click “Add New Customer” right below the “Customer Name”. Proceed by inputting all the necessary details on the “Add New Customer” form, then click “Save” to successfully add the new customer.
7. Select the mode of payment on the “Payment Option” dropdown. (Example: GCash.)
8. Enter the customer’s total payment. The customer’s change will automatically be computed.
9. Enter a note for the order (Optional).
10. Click “Save and Print” to successfully save the order and print a receipt.
11. Click “Save” to successfully save the order without printing a receipt.
12. Click Cancel to invalidate the changes.

f. Printing Receipts

1. Order not yet processed:

   1.1. On the “Payment Details”, choose “Save and Print”.

2. Order has been processed:

   2.1. Scroll down to the bottom of the page and check “Previous Transactions”.

   2.2. Click “View Details” of an order/row.

   2.3. The “Order Details” form will pop-up.

   2.4. Click Print.

g. Viewing previous transactions

1. On the bottom of the page, the last five transactions are showcased.
2. To print a processed order, click “View Details” then “Print” on the “Order Details” form.

3. Navigating Reports

a. Choosing a Report Submodule
    1. Make sure that the user is viewing the correct reports submodule. To see what type of report the user is in, refer to the text on the upper left of the page right above the table. (Ex: Sales Reports)
    2. To change the reports submodule, click the Reports Module from the main menu and choose from the dropdown options. (Ex: Sales Reports or Inventory)
b. Choosing a Report Type
    1. On the upper left on the table, choose what type of Report to view. (Ex: In Sales Reports, choose Delivery to view delivery sales only.)
    2. To view all the reports, choose All.
c. Filtering Reports
    1. To filter the reports from a specific timeframe, choose the starting in the calendar beside "From:" text and the ending date in the calendar beside "To:" text.
    2. Click Filter.
d. Printing a Report
    1. Make sure that the report the user wants to print is currently being shown on the table.
    2. Click Print beside the Filter button.
e. Searching for a Report
    1. On the upper right of the page, click the search bar.
    2. Input the keywords related to the target data. *Note: The table will automatically filter as the user types on the search bar.*

4. Navigating Monitoring: POS Transaction

a. Viewing Today's Previous Transactions
    1. On the top right, choose "All" on the selection to view all the transactions for today.
    2. Choose "Walk-in" to view walk-in transactions for today, and "Delivery" for delivery orders only.
b. Viewing order details through POS Transaction
    1. Click "View Details" under the Order Details column.
    2. Once clicked, the "Transaction Details" form of an order will pop-up.
c. Printing the transaction details on a specific order

        1. Click “View Details” of a specific order to reveal the Transaction Details.
        2. On the “Transaction Details” form, click “Print”.
    d. Paying Unpaid Orders
        1. Click “View Details” of a specific order to reveal the Transaction Details.
        2. On the Transaction Details form, click “Payment” on the very bottom.
        3. On the Payment Details, input the amount of cash given by the customer. If the customer has an available balance, put 0 on the “Cash Payment” textbox to use the remaining balance. If the customer has an available balance but opts to pay with cash instead, enter the total cash payment on the textbox.
    e. Searching Transactions
        1. On the upper right of the page, click the search bar.
        2. Input the keywords related to the target data. *Note: The table will automatically filter as the user types on the search bar.*

5. **Navigating Monitoring: Delivery/Pick Up**
    a. Selecting Service Type
        1. On the top right of the page right beside the search bar, select a service type. “All” is selected by default.
        2. When “Delivery” is selected, orders only meant for delivery will be viewed.
        3. When “Delivery/Pickup” is selected, orders that include picking up the container from the customer’s house and going back to deliver the filled up container will be viewed.
    b. Viewing Pick Up List
        1. On the top right of the page right below the Service Type dropdown, click “Pick Up List”.
        2. On this page, the user can see all and ongoing orders for pickup.
        3. To go back to the delivery/pickup page, click “Pending Delivery and Pick Up”.
    c. Viewing Delivered Customers List
        1. On the top right of the page right below the Search bar, click “Delivered Customers List”.

   2. On this page, all delivered orders can be viewed.
   3. To go back to the delivery/pickup page, click “Pending Delivery and Pick Up”.

d. Adding orders for pickup
   1. On the pending delivery/pickup table (left side of the page), click “Add for Pick Up” (yellow button).

e. Adding orders to ongoing pickup
   1. Go to “Pick Up List.”
   2. Select a delivery boy on the dropdown at the far left of the table.
   3. Click the blue button indicating “Add To Ongoing Pickup”.

f. Deleting orders from pickup list
   1. On the farthest left of the table, click the “X” button.

g. Adding orders for delivery
   1. On the pending delivery/pickup table (left side of the page), click “Add for Delivery” (green button).
   2. On the right side of the page, the delivery list can be viewed.
   3. Select the delivery boy.
   4. Click the green “Deliver” button.

h. Printing delivery list
   1. Click the gray “Print” button on the bottom of the delivery list element.

i. Deleting orders from delivery list
   1. On the farthest left of the table, click the red “X” button.

j. Setting orders as delivered
   1. On the ongoing orders at the bottom of the page, ongoing deliveries can be viewed.
   2. Click the red “x” button to cancel the delivery.
   3. Click the blue “Add As Delivered” button to successfully set the ongoing order as completed and add to the Delivered List.

k. Searching for pending delivery/pickup orders
   1. On the upper right of the page, click the search bar.
   2. Input the keywords related to the target data. *Note: The table will automatically filter as the user types on the search bar.*

6. Navigating Monitoring: Customer Balance

a. Checking a Customer’s Balance

1. Click “Monitoring” module, then go to “Customer Balance”.
2. On the left side of the first table, the total of customers with balance is indicated inside the “Customer with Balance” element.
3. To see all the customers with balance, scroll down to look at the “List of Customers With Available Balance”.

b. Adding Balance to A Customer
1. On the top left of the page, click “Add Balance”.
2. Select the customer’s name.
3. Input the amount of payment on the textbox right beside “Advance Payment”.
4. Click “Save” to successfully add the balance.
5. Click “Cancel” to invalidate the action.

c. Editing Customer’s Existing Balance
1. Click the gray edit icon under the Action column of the “List of Customers with Available Balance” table.
2. Input the new amount of the balance on the textbox right beside “Advance Payment”.
3. Click “Save” to successfully add the balance.
4. Click “Cancel” to invalidate the action.

d. Checking a Customer’s Credit
1. Click “Monitoring” module, then go to “Customer Balance”.
2. On the left side of the first table, the total of customers with balance is indicated inside the “Customer with Credit” element.
3. To see all the customers with credit, look at the “List of Customers With Credit”.

e. Paying Customer’s Credit
4. Click on the customer’s row on the table.
5. Once redirected to the POS Transaction, click “view details” under the Order Details column of the table. *Note: Remember to click on the correct unpaid order.*
6. On the Transaction Details form, click “Payment” on the very bottom.
7. On the Payment Details, input the amount of cash given by the customer. If the customer has an available balance, put 0 on the “Cash Payment” textbox to use the remaining balance. If the customer has an

available balance but opts to pay with cash instead, enter the total cash payment on the textbox.

f. Searching Customer Balance/Credit

   3. On the upper right of the page, click the search bar.
   4. Input the keywords related to the target data. *Note: The table will automatically filter as the user types on the search bar.*

7. Navigating Monitoring: Scheduling

a. Viewing Weekly Schedule

   1. On the top of the page, the total scheduled delivery for the day can be seen.
   2. The first table shows the scheduled orders of the week. The "Select Day" dropdown will allow the user to select a specific day of the week and view the scheduled orders of that day only.

b. Adding a scheduled order (Weekly)

   1. Click the "Weekly Schedule" button on the top left of the page.
   2. On the Weekly Schedule form, fill out the customer name. Note: The customer must be added on the system first, customers can be added on the Customer module.
   3. Select the day/s of which the customer's order must be delivered.

c. Adding a scheduled order (One time)

   1. Click the "Date Schedule" button right beside "Weekly Schedule".
   2. On the Date Schedule form, fill out the customer name. Note: The customer must be added on the system first, customers can be added on the Customer module.
   3. Select the date of which the customer's order must be delivered.

8. Navigating Monitoring: Item History

a. Monitoring Items

   1. The first table on top of the page consists of the total remaining items available.
   2. Items with "IN" indicated in the action column are new stocks from the specified supplier.
   3. Items with "OUT" indicated in the action column are items taken out through transactions with customers.

b. Searching Item History

1. On the upper right corner, click the search bar.
2. Input the keywords to find a specific customer data. *Note: The table will automatically filter as the user types on the search bar.*

9. Navigating Customer

a. Adding Customers

1. Click the Customer module.
2. Click the "Add New Customer" button from the top left corner. A form will pop-up.
3. In the "Add New Customer" form, fill up the necessary information such as Customer's Name, Address, Contact Number, and additional information(Optional) in the Notes text field.
4. Click the button "Save" to confirm.

b. Editing Existing Customers

1. Click the grey icon, under the action column. A form will pop-up.
2. In the "Edit Customer" form, edit the necessary information.
3. Click the button "Save" to confirm the changes.
4. Click the button "Cancel" to cancel the changes.

c. Archiving Customers

1. Click the red icon, under the action column. A prompt window will pop-up.
2. Click the "Archive" button to archive the chosen customer data.
3. Click the "Cancel" button to cancel the action.

d. Searching for Customers

1. On the upper right corner, click the search bar.
2. Input the keywords to find a specific customer data. *Note: The table will automatically filter as the user types on the search bar.*

10. Navigating Inventory: Stocks

a. Adding Stocks

1. Click the "Add Stocks" button.
2. Select the item to add new stocks to.
3. Fill out the form with the necessary details such supplier, item quantity, and purchase amount.
4. Click the button "Save" to confirm the changes.
5. Click the button "Cancel" to cancel the changes.

b. Searching Stocks
    1. On the upper right corner, click the search bar.
    2. Input the keywords to find a specific customer data. *Note: The table will automatically filter as the user types on the search bar.*

11. Navigating Inventory: Items

a. Adding Inventory Items
    1. Click the "Inventory" module then the "Items" submodule.
    2. Select the category item: "Item Details" or "Refill Item".
        2.1. Choosing Item Details
            1. On the top left corner, click the "Add New Item" button.
            2. A prompt window will pop-up asking if the item is a POS Item or not. *Note: POS items are transactable. For example: Bottles, Gallons, etc. Non-POS items are not transactable. For example: Faucet Seals, Small Cap Seal, etc.*
            3. Complete the form by entering item name, selecting the type, reorder level, prices, and other required details.
            4. An image of the item can also be added (optional).
            5. Click the "Save" button to update the items.
            6. Click the "Cancel" button to cancel the action.
        2.2. Choosing Refill Price
            1. Click the "Refill Price" button.
            2. Click the "Add Refill Item" button.
            3. A form will pop-up, enter the item name, the price and mineral price of the item.
            4. An image of the item can also be added (optional).
            5. Click the "Save" button to update the changes.
            6. Click the "Cancel" button to cancel the action.

12. Navigating Employee: Attendance

a. Adding Attendance
    1. Click the "Employee" module then "Attendance" submodule.
    2. On the top left, click the "Add Attendance" button.
    3. A form will pop-up, fill out the form by selecting the employee under the drop-down option, date of attendance, time in and out, and other necessary details.

4. Select between “Whole day” or “Half day”.
5. Click the “Save” button to confirm changes.
6. Click the “Cancel” button to cancel the action.

b. Editing Existing Attendance
1. Click the grey icon, under the action column. A form will pop-up.
2. The “Add Attendance” form will pop-up again.
3. Edit the necessary information.
4. Click the button “Save” to confirm the changes.
5. Click the button “Cancel” to cancel the changes.

c. Archiving Attendance
1. Click the red icon, under the action column. A prompt window will pop-up.
2. Click the “Archive” button to archive the chosen customer data.
3. Click the “Cancel” button to cancel the action.

d. Processing the payroll: Single Employee
1. Click the checkbox located before the ID number of the employee.
2. Make sure the employee is selected and marked with a check mark.
3. Click the “wallet with a plus sign" button under the action button.
4. A prompt window will pop-up. Click “Process” to process the payroll of the employee.
5. The status of the employee will be changed to “Paid”.

e. For Processing Multiple/All Employees:
1. Select multiple employees by clicking the checkbox located before the ID number of the employee.
2. Click the “PAYROLL” button, to process all selected employees.
3. A prompt window will pop-up. Click “Process” to process the payroll.
4. The status of the employees will be changed to “Paid”.

f. Searching for Employees
1. On the upper right corner, click the search bar.
2. Input the keywords to find a specific customer data. *Note: The table will automatically filter as the user types on the search bar.*

13. Navigating Employee: Employee List

a. Adding Employees
1. Click the “Employee” module then “Employee List”

2. On the top left, click the “Add New Employee”
3. A form will pop-up, fill out the new employee’s information.
4. Click “Save” to add the new employee.

e. Editing Existing Employees
1. Click the grey icon under the action column, a form will pop-up.
2. In the “Edit Employee” form, edit the necessary information.
3. Click the button “Save” to confirm the changes.
4. Click the button “Cancel” to cancel the changes.

f. Archiving Employees
1. Click the red icon, under the action column. A prompt window will pop-up.
2. Clicking the “Archive” button will archive the chosen employee data.
3. Clicking the “Cancel” button will cancel the action.

g. Searching for Attendance
1. On the upper right corner, click the search bar.
2. Input the keywords to find a specific employee data. *Note: The table will automatically filter as the user types on the search bar.*

14. Navigating Expense

a. Adding expenses
1. Click the “Customer” module (5th module) from the main menu.
2. On the upper left of the module, click “Add New Expense”.
3. Select what type of expense will be added. *Note: Employee salary is automatically added on the expenses when the user issues the payroll.*
4. Complete the form by entering the date, amount, and description.
5. To successfully add the expense, click “Save”.
6. Click “Cancel” to cancel adding the expense.

b. Editing existing expenses
1. To edit an existing expense, click the “Edit” button (Gray Icon under the Action column) from the chosen row on the table.
2. Make the necessary changes by inputting details on the form.
3. Click “Save” to successfully update the expense.
4. Click “Cancel” to invalidate the changes.

c. Archiving expenses
1. To archive an existing expense, click the “Archive” button (Red Icon

under the Action column) from the chosen row on the table.
2. On the confirmation form, click “Archive” to successfully move the chosen data to the Archives submodule (Settings module).
3. Click “Cancel” to cancel archiving the expense.

d. Searching for an expense
1. On the upper right of the page, click the search bar.
2. Input the keywords related to the target data. *Note: The table will automatically filter as the user types on the search bar.*

15. Navigating Account: Account Type

a. Adding an account type
1. Click “Account” module, then “Account Type” submodule.
2. Click the “Add New User” button on the top left of the page.
3. On the “Add New Account” form, input the role description or name.
4. Select all the modules and features the new role can access.
5. Click “Save” to successfully save the new role.
6. Click “Cancel” to invalidate the action.

b. Editing an account type
1. On the table, click the Edit button on the action column of the role the user wants to edit.
2. Make the necessary changes by either renaming the role description or ticking/unticking the modules and features to be accessed.
3. Click “Save” to successfully save the changes.
4. Click “Cancel” to invalidate the changes.

c. Archiving an account type
1. On the table, click the Archive button on the action column of the role the user wants to edit.
2. Once clicked, a confirmation window will pop up.
3. Click “Confirm” to successfully archive the role.
4. Click “Cancel” to invalidate the action.

d. Searching for an account type
1. On the upper right of the page, click the search bar.
2. Input the keywords related to the target data. *Note: The table will automatically filter as the user types on the search bar.*

16. Navigating Account: User Account

a. Adding a user account
    1. Click the “Add New User” button.
    2. On the “Add New Account” form, input the necessary details such as name, contact number, role, password, and profile picture.
    3. Click “Save” to successfully save the new user.
    4. Click “Cancel” to invalidate the action.
b. Editing a user account
    1. To edit an existing user, click the “Edit” button (Gray Icon under the Action column) from the chosen row on the table.
    2. Make the necessary changes by inputting details on the form.
    3. Click “Save” to successfully update the user account.
    4. Click “Cancel” to invalidate the changes.
c. Archiving a user account
    1. To archive an existing user, click the “Archive” button (Red Icon under the Action column) from the chosen row on the table.
    2. On the confirmation form, click “Archive” to successfully move the chosen data to the Archives submodule (Settings module).
    3. Click “Cancel” to cancel archiving the user account.
d. Searching for a user account
    1. On the upper right of the page, click the search bar.
    2. Input the keywords related to the target data. *Note: The table will automatically filter as the user types on the search bar.*

17. Navigating Settings: Help

a. Searching through Help
    1. User can use two methods to search through the Help module: (1) scroll down through the forum, and (2) use the search bar and use phrases related to the user’s concerns to filter the forum.
b. Viewing Answers
    1. To view the answers/tutorial, click the question or arrow down icon “v”.

18. Navigating Settings: Data Logs

a. Reviewing Data Logs
    1. Hover the mouse on the presented table or use the scrollbar.
    2. Scroll through the table to view the activities conducted within the

web-based system.

b. Search through Logs
    1. On the upper right of the page, click the search bar.
    2. Input the keywords related to the target data. *Note: The table will automatically filter as the user types on the search bar.*

19. Navigating Settings: Archives

a. Selecting Data
    1. User must select a data type first to view archived items.
    2. On the top left, click the “Select Data” dropdown and choose among the options.
    3. After selecting a data, the table will automatically show the corresponding archived item under the selected data.

b. Restoring Archived Data: Single Item
    1. To restore a single item, click the Restore button (Red button) on the far right of the item row the user wants to restore.

c. Restoring Archived Data: Multiple Items
    1. To restore multiple items, tick the checkmarks on the far left of the row items the user wants to restore.

d. Restoring Archived Data: All Items from the Select Data
    1. To restore all items, tick the “Check All” checkbox on top of the table beside the “Restore” button.
    2. Click the “Restore” button.
    3. On the confirmation form, click “Restore” to successfully restore the item.
    4. Click “Cancel” to cancel the action.

e. Searching an archived item
    1. On the upper right of the page, click the search bar.
    2. Input the keywords related to the target data. *Note: The table will automatically filter as the user types on the search bar.*

20. Navigating Settings: Backup/Restore

a. How to Backup
    1. Click Backup All.

2. On the confirm Backup form, click confirm to successfully backup all the data.
3. Click Cancel to invalidate the action.

b. How to Restore
    1. Click Restore.
    2. On the Restore Database form, choose backup file from the device.
    3. Click confirm to successfully restore the item.
    4. Click Cancel to invalidate the action.