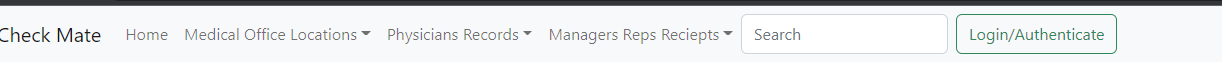
**CheckMate User Guide**  
  
**Tip**: Logging In  
**Tip**: Adding , searching and deleting records  
**Tip**: Managers, Reps and receipts  
**Tip**: Deployment  
**Tip**: Report(s)

**Tip**: Logging In  
From the login screen  
  
Graphical user interface, application, Word

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Enter in your email address and password.  
  
If you don’t have on, select “signup” to create an account  
  
  
Once logged in, The main menu will appear  
Graphical user interface, application, Word

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Graphical user interface, application, Word

Description automatically generated  
  


**Tip**: Adding , searching and deleting records

Graphical user interface, text, application, email

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Each screen has the same functionality in terms of adding. Updating and deleting record.  
  
To add a record, select “add …..”  
Graphical user interface, text, application, email

Description automatically generated  
  
When in add mode, you will notice that the “Update Record” button is “disabled”  
  
The submit button, adds a new record, You get a success message when the record is added.  
  
Graphical user interface, text, application, email

Description automatically generated  
  
  
The Add New Button, clears the screen for you to add another record (but by default, when you add a new record, the screen clears automatically),  
  
**SEARCHING FOR A RECORD**  
To search for a record:  
  
Graphical user interface, text, application, email

Description automatically generated  
  
Each search screen has it’s own set of criteria, in the example below, I selected “**all**” from the Enter Search Criteria dropdown:  
  
Graphical user interface, text, application, email

Description automatically generated  
To Delete record, hit the trashcan  
  
To view a record, hit the binoculars

  
  
Graphical user interface, text, application, email

Description automatically generated  
As you can see above, the update record button  
Graphical user interface

Description automatically generated with low confidence  
  
Is now “enabled” for “update” the existing record. The **Submit and Add new buttons are “disabled”**  
  
**Tip**: Managers, Reps and receipts **Managers, Reps and Receipts**  
Graphical user interface, text, application

Description automatically generated  
  
On these three screens, there relationships:  
**A Rep Record “has” to have a manager, a Receipt record “has” to have a rep.**  
  
So first we add a Manager:  
Go to Search to see a list of managers in your system:  
  
Graphical user interface, text, application, email

Description automatically generated  
  
When we add a Rep record there is a “dropdown” with the list of managers shown above.  
Below is the dropdown:  
Graphical user interface, text, application, email

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The same goes for when entering a receipt:

A screenshot of a computer

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Graphical user interface, text, application, email

Description automatically generated  
  
  
**Tip**: Report(s)

Reports can be accessed:  
Graphical user interface, text, application, chat or text message

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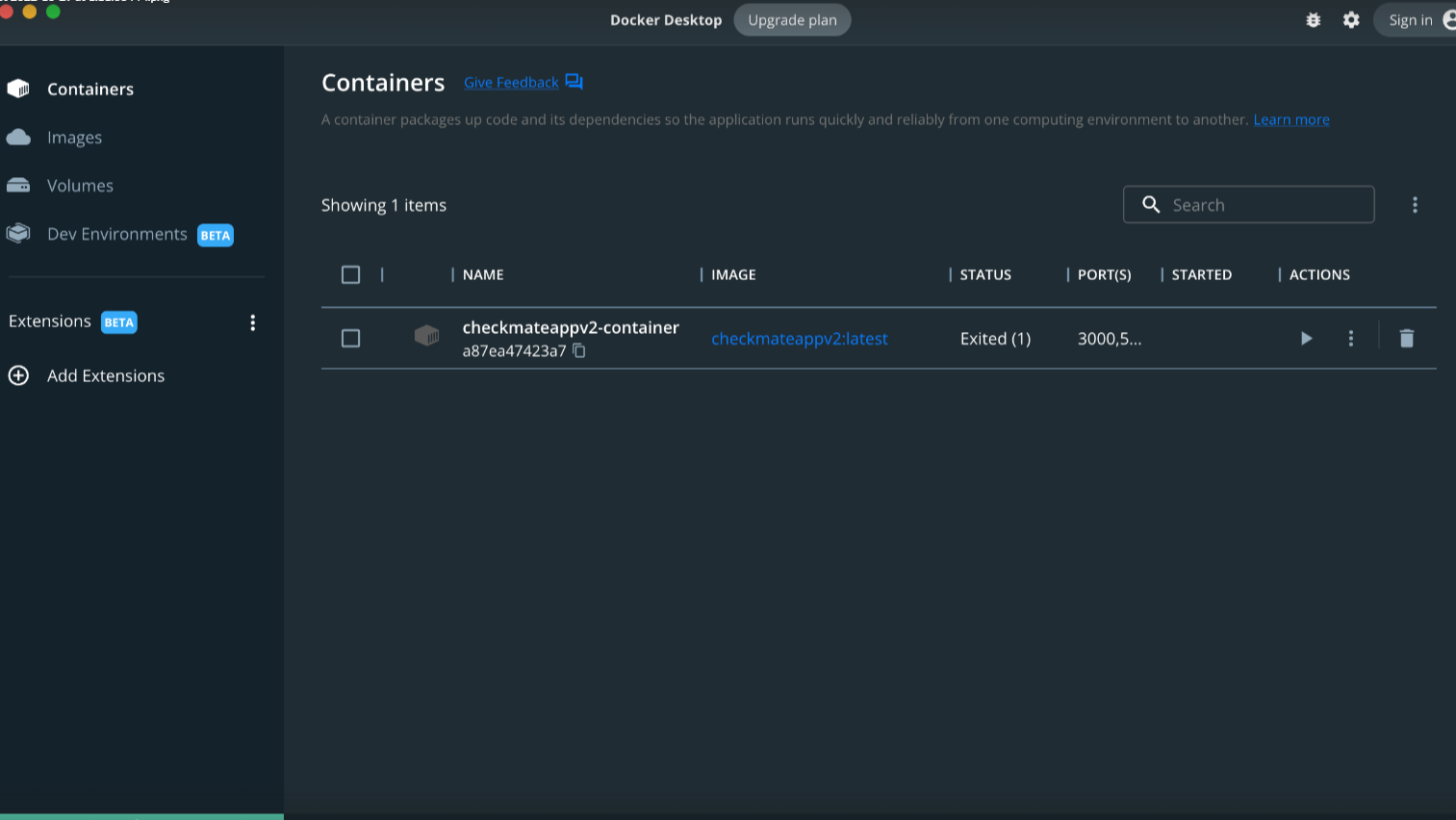
And also as shown below, you can export the results to .csv file  
A screenshot of a computer

Description automatically generated  
A screenshot of a computer

Description automatically generated

**Tip**: Deployment  
There are two ways of viewing the application  
**Step One:**  
There will be a link to a hosted site on Heroku (**Shared later**)  
  
**Step Two:**  
**Docker** Local container install  
<https://docs.docker.com/desktop/install/mac-install/>

A screenshot of a computer

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Docker allows you run the application as an image installed locally on your computer.  
When docker is setup and installed and the container is created, you will see the container for it when you start docker up.  
  
  
  
You hit the run icon  
Graphical user interface, text, application

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When it is running, you will see the status – started  
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Then you can go to your browser and type:  
<http://localhost:3000>  
Graphical user interface

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