InventoryFlow

V1.0 Manual

Developed by **Luyando Hambala**

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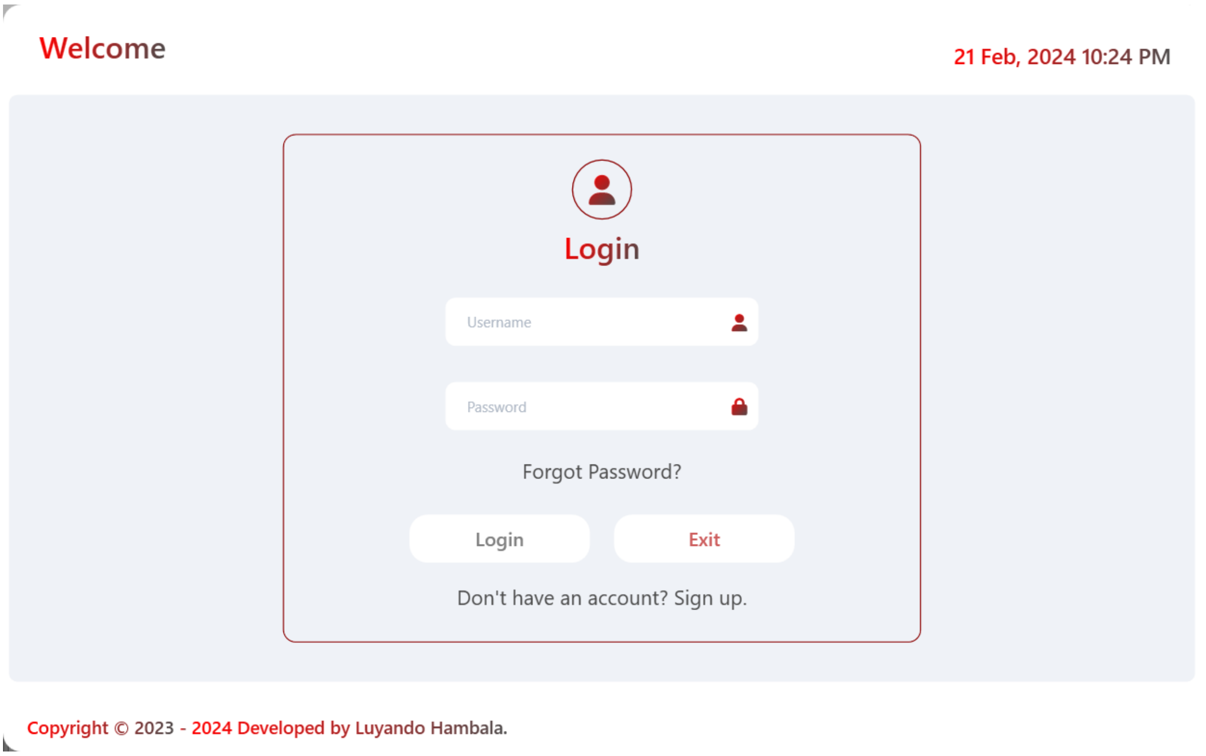
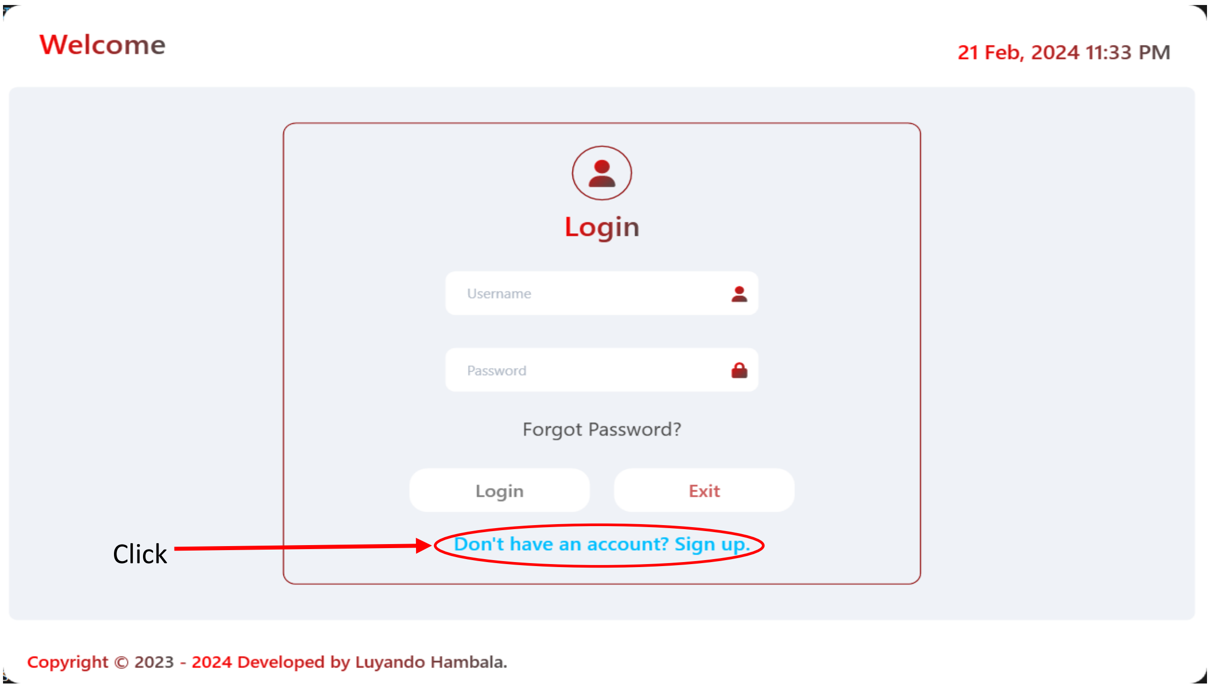
Signing In



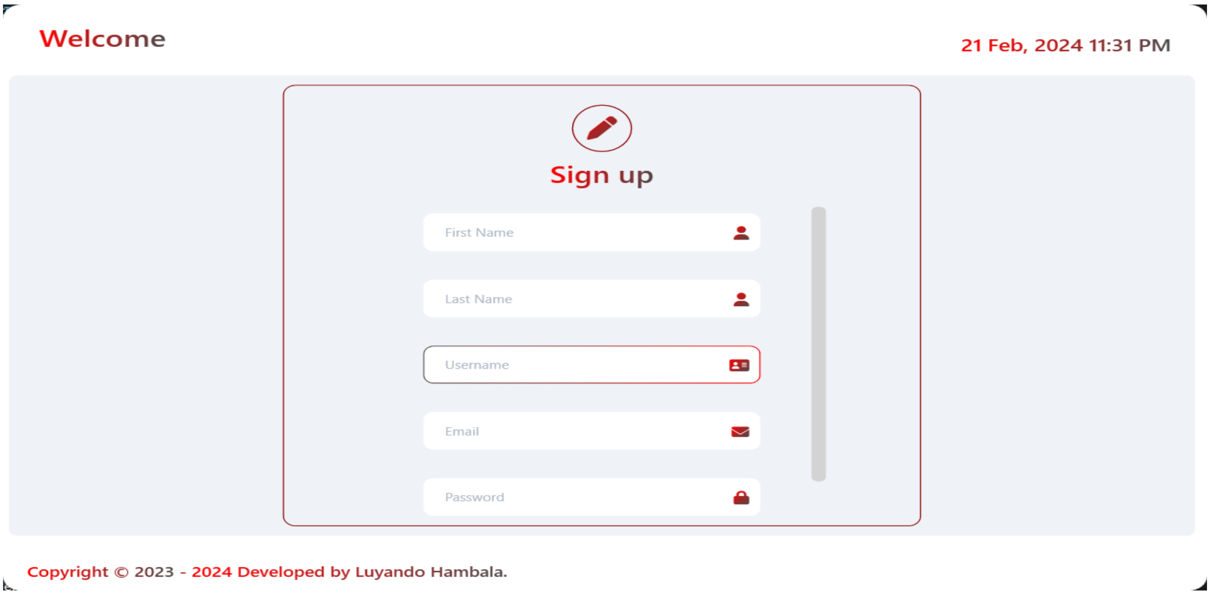
Upon starting the application, you are greeted with the login page. Provided you have an account, you may sign in with your username and password by typing them into their respective fields. Thereafter, clicking the login button should sign you in accordingly.

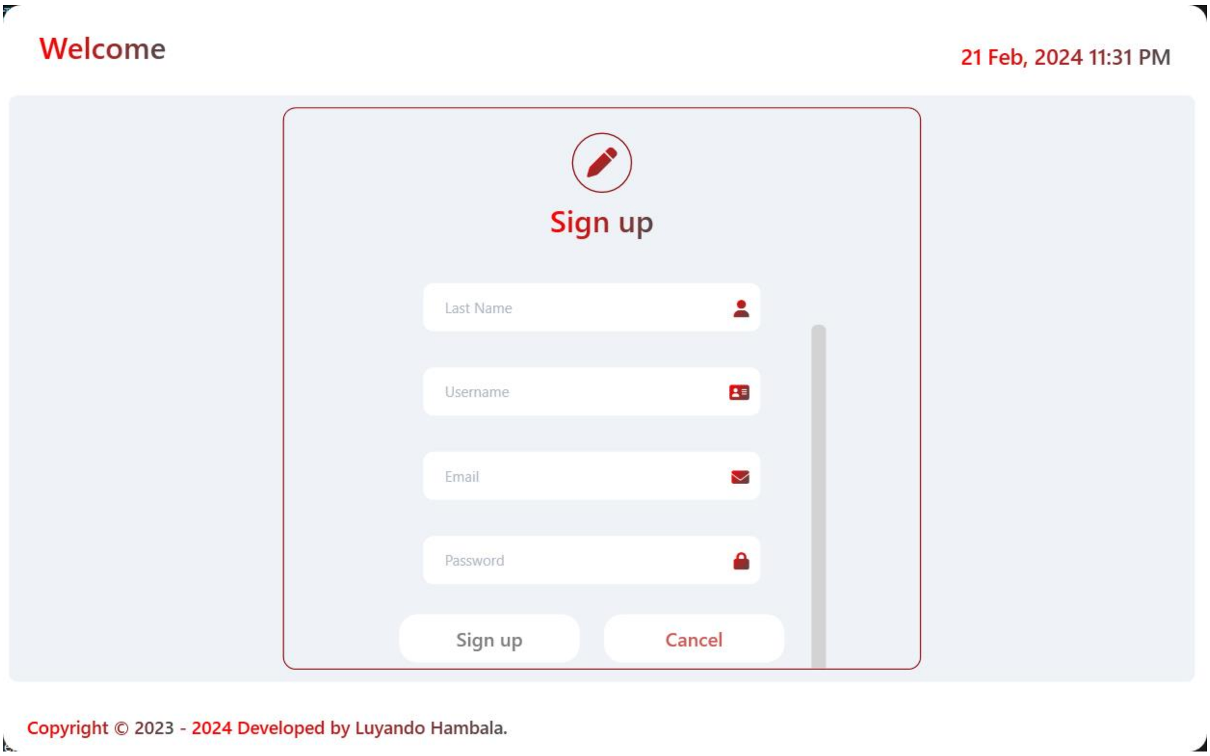
Creating an Account



To create an account, simply click the “Don’t have an account? Sign up” link. When prompted for an administrator password, type in **0607** and click accept and the following window should appear.

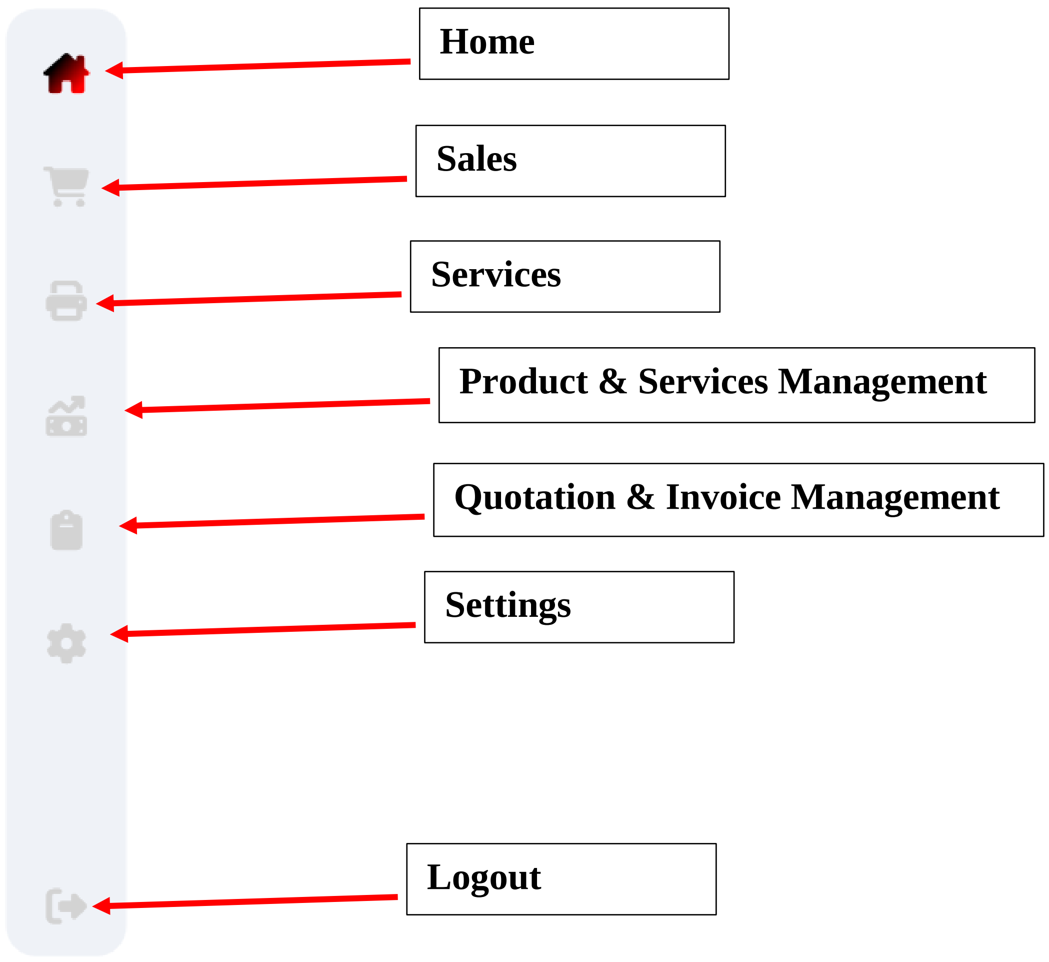
Note: Accounts created using this method are automatically added as administrator accounts.





Fill in the fields with the appropriate details and scroll down till the “Sign up” button is visible. Click on it to complete the sign up process. You will then be successfully sign in!

Navigation



The application features a simple and easy to use navigation panel docked to the left side of the window.

This panel contains **Home, Sales, Services, Product & Services Management, Quotation & Invoice Management, Settings** and **Logout Icons**. Clicking on these icons help navigate you to various views and panels of the application.

1. **Home:** This displays the Home page. The home page contains the dashboard and its various easy to use short-cut buttons and graph.

2. **Sales:** This displays the Sales page. This page contains the list of products available for sale and their respective prices.

3. **Services:** This displays the Services page. This page contains the list of products available for sale and their respective prices.

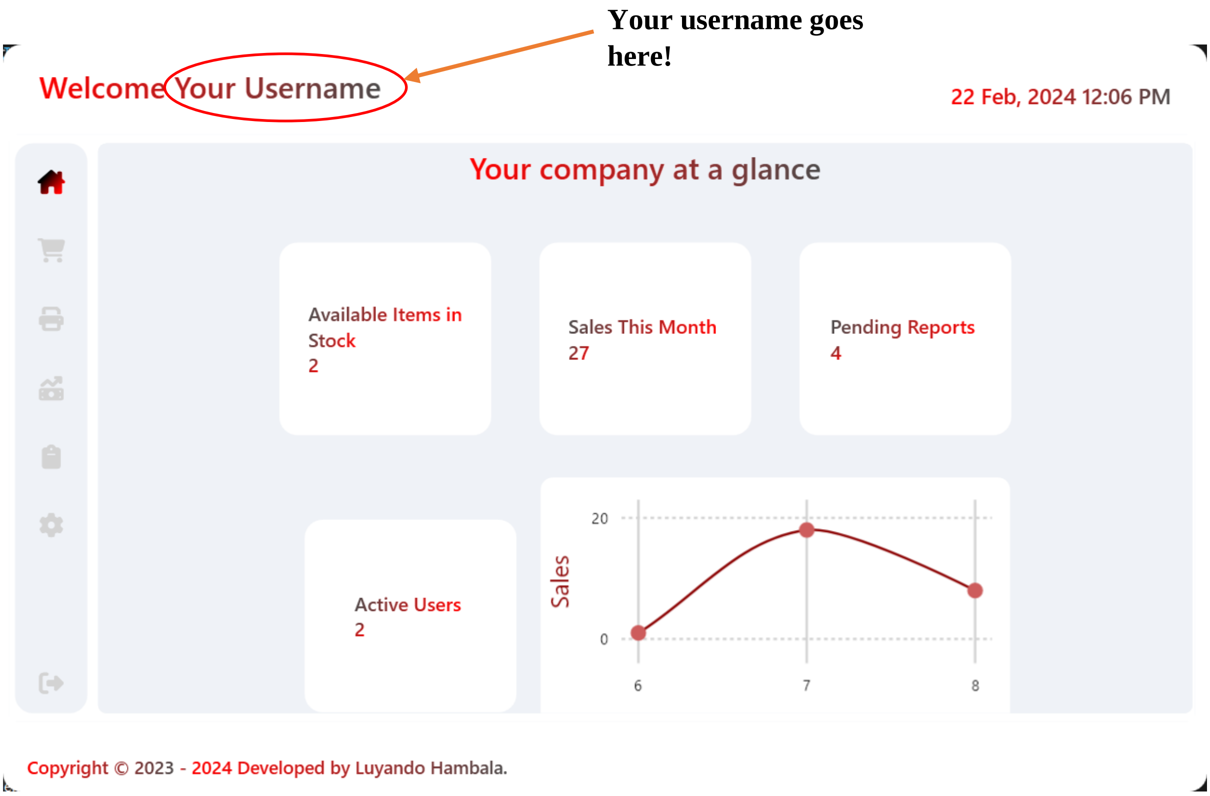
4. **Product & Services Management:** This displays the Products & Services Management page which contains all the necessary tools required to manage, view and edit your Products and Services available.

5. **Quotation / Invoice Management:** This displays the Quotation / Invoice Management Page. The page contains simple and easy to use tools that make creation of these documents easier within the application itself.

6. **Settings:** This displays the settings the application utilises in order to operate efficiently.

7. **Logout:** This prompts the user if they want to logout or not. Should they agree, they are taken back to the login page of the application.

Dashboard

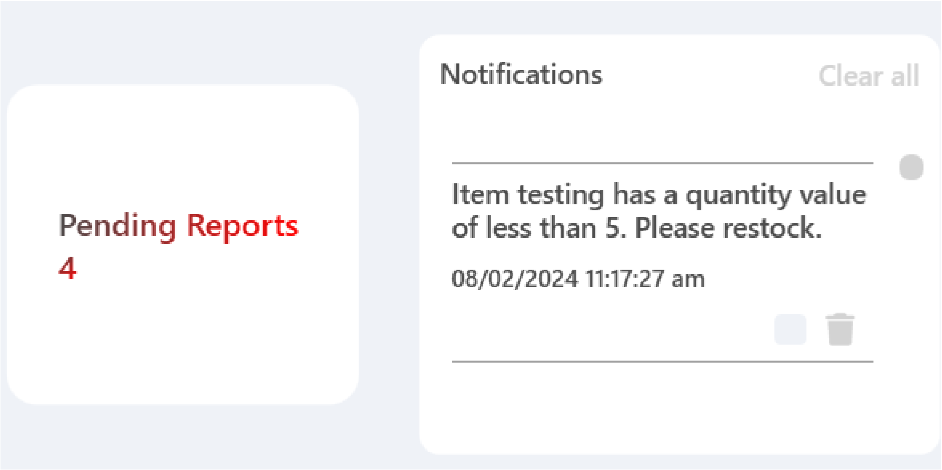


Upon signing in, you are greeted with the user dashboard. This dashboard contains summarised information of your company's statistics.

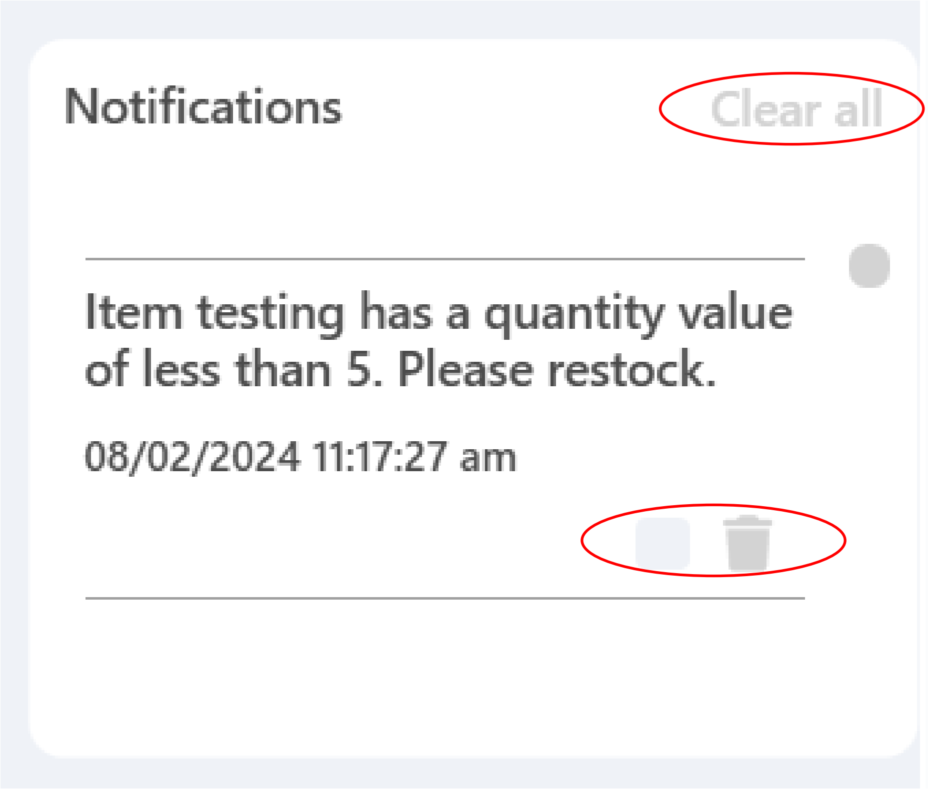
1. **Available Items In Stock:** This button displays the sum of the current products and services available in stock for offer. To see more detailed information about your stock items, click on the button and it will navigate you to the **Product and Services Management Page**.

2. **Sales This Month:** This button displays the sum number of all successful sales carried out using the application. To see more detailed information about your sales, click on the button and it will navigate you to the **Sales Tab** under the Product and Services Management Page.

3. **Pending Reports:** This button displays the total number of pending reports that need to be tended to. To view the reports in question, simply click the button and you should be greeted with the notification panel below.



To close the notification panel simply click the **Pending Reports** button again.

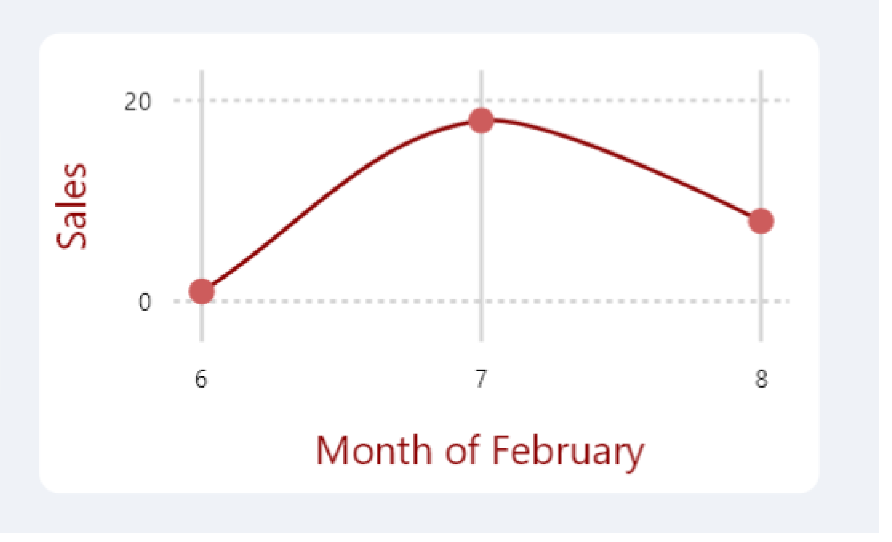


The notification panel features several functions.

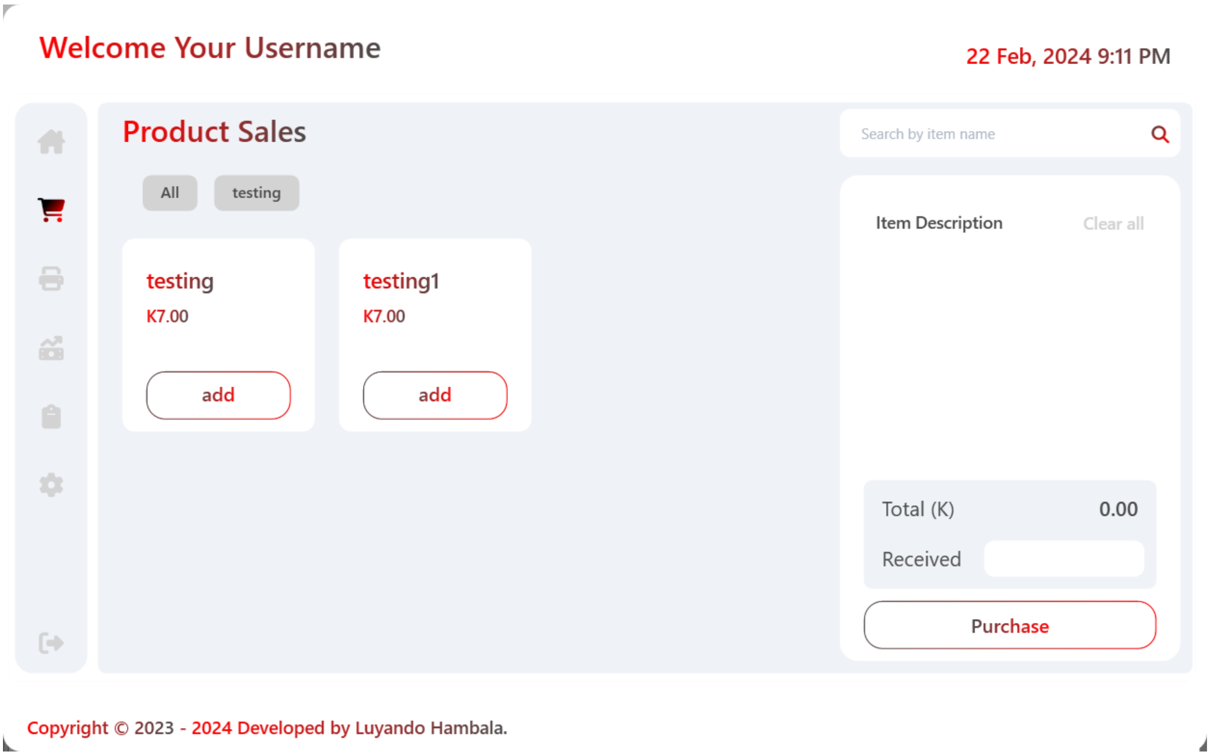
- To delete all notifications, simply click the **Clear all** button on the top right corner of the panel.
- To delete a specific notification, simply click the **Trash Icon** at the bottom right of the message slide.
- To mark the notification as **read** simply click the checkbox beside the trash icon.

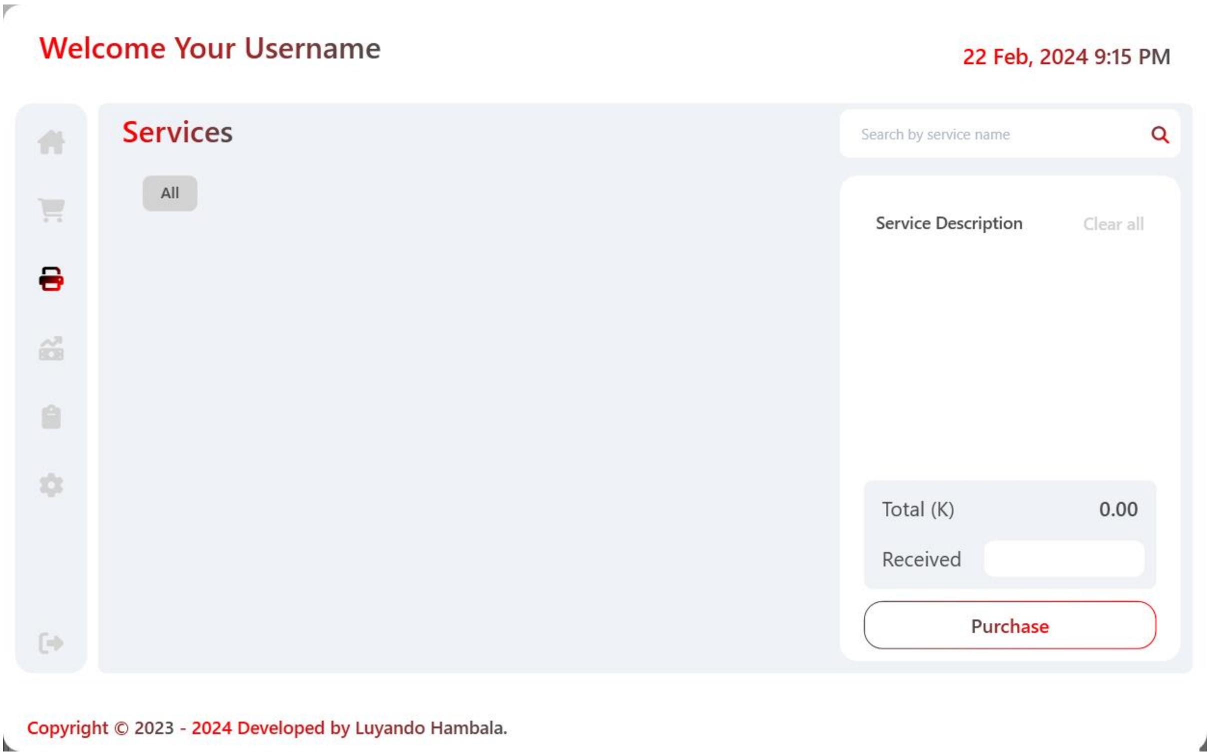
4. **Active Users:** This button displays the total number of active accounts on the application. To view the users in detail, simply click on the button and it will navigate you to the **Users Tab** under the Settings Page.

5. **Sales Graph:** The graph displays a summary of the total number of sales per day respective to the current month.



Sales and Services Pages

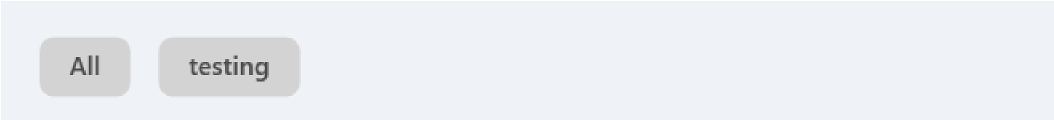




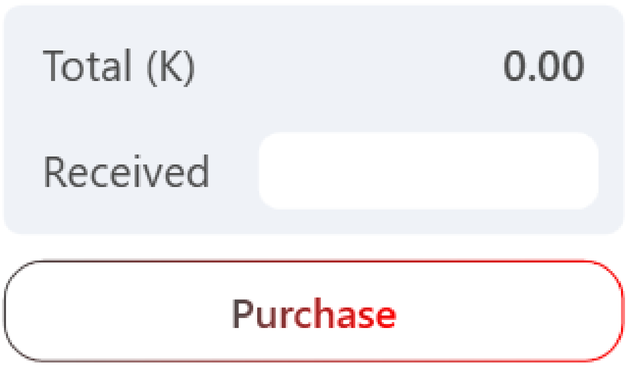
The Sales and Services Pages operate using the same commands. The list of available Services and Products is displayed to the left of the window just below the category tab.

To add a service or product, simply click on the items **Add to Cart** button. The item will then be displayed in the checkout list to the right of the window just below the search bar.

Note: **Products can only be displayed under the Product Sales Page if they have a quantity of 1 or greater!**

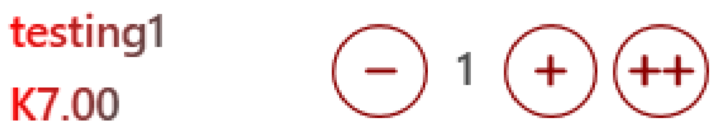


To list items specific to a category the buttons in the **Category Tab** may be clicked according to required category.



Completion of purchases can be done by clicking the **Purchase** button after putting in the received amount in the received space above. Thereafter, you will be prompted to agree to have a receipt printed or not.

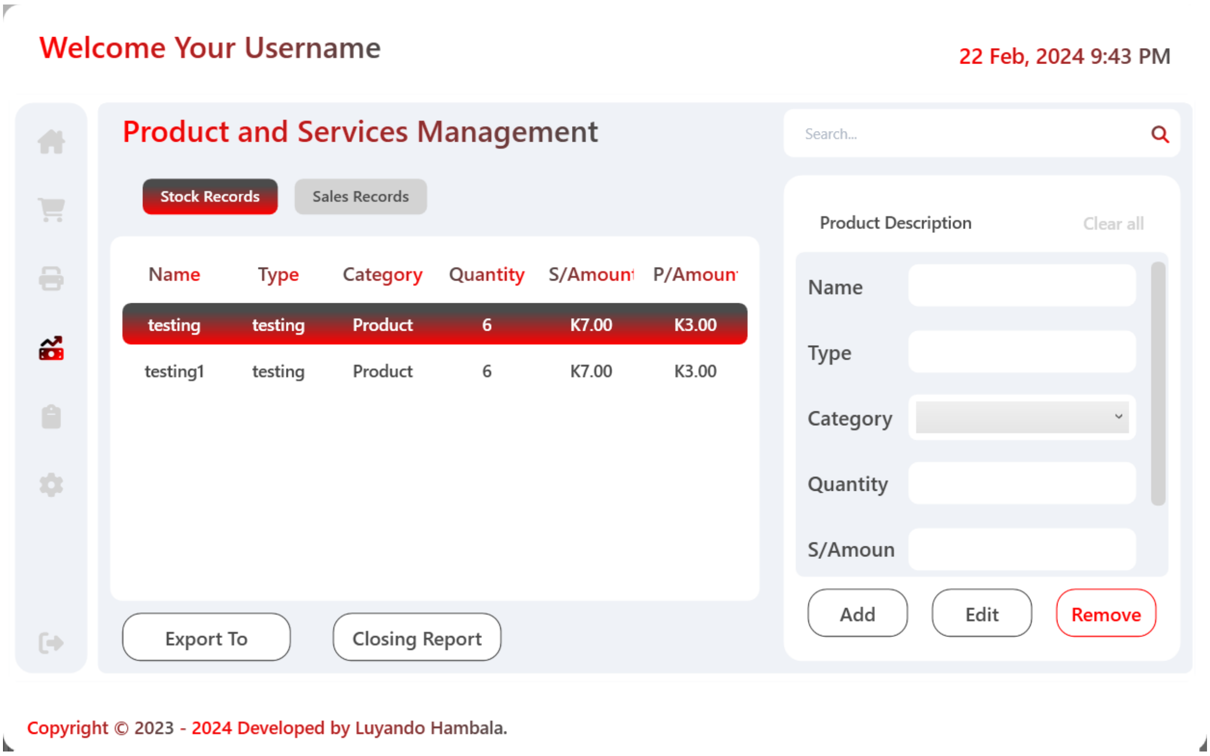
To clear all items added to the checkout list, simply click the **Clear all** button to the top right of the checkout panel.

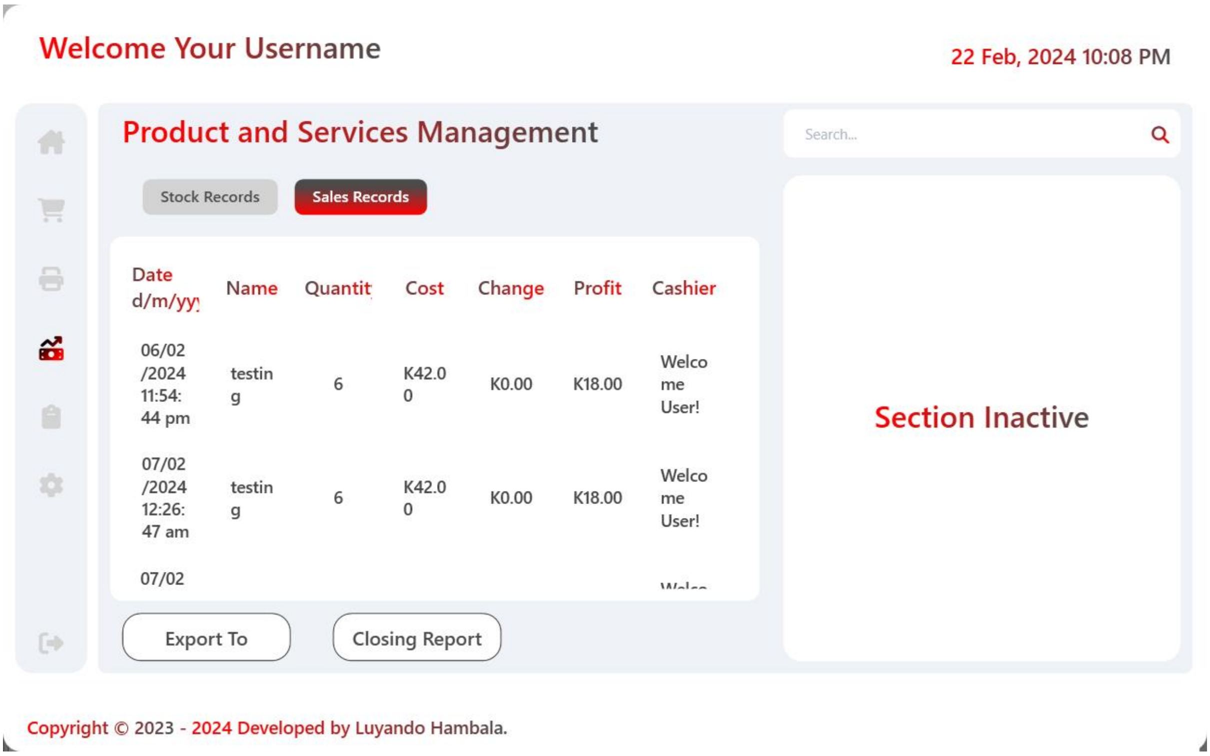


To increase the quantity of the product/ service to be offered, clicking the **+** button will increment it by 1. Clicking the **–** button will decrease is it by 1.

To increment it by a specific margin, click the ++ button to the far right of the slider, this will then prompt you with the message, "**Manual entry is enabled**", thereafter click on the quantity and put in the required quantity and click the + or - button again to disable manual entry and apply changes to new quantity.

Product and Services Management





The Product and Services Management page shows all stock inputted to the system, as well as, all recorded transactions (sales and services).

The **Product Description** panel is used to add products and/or services to the system. Fill in the fields with the corresponding details and click the **add** button to add to the system.

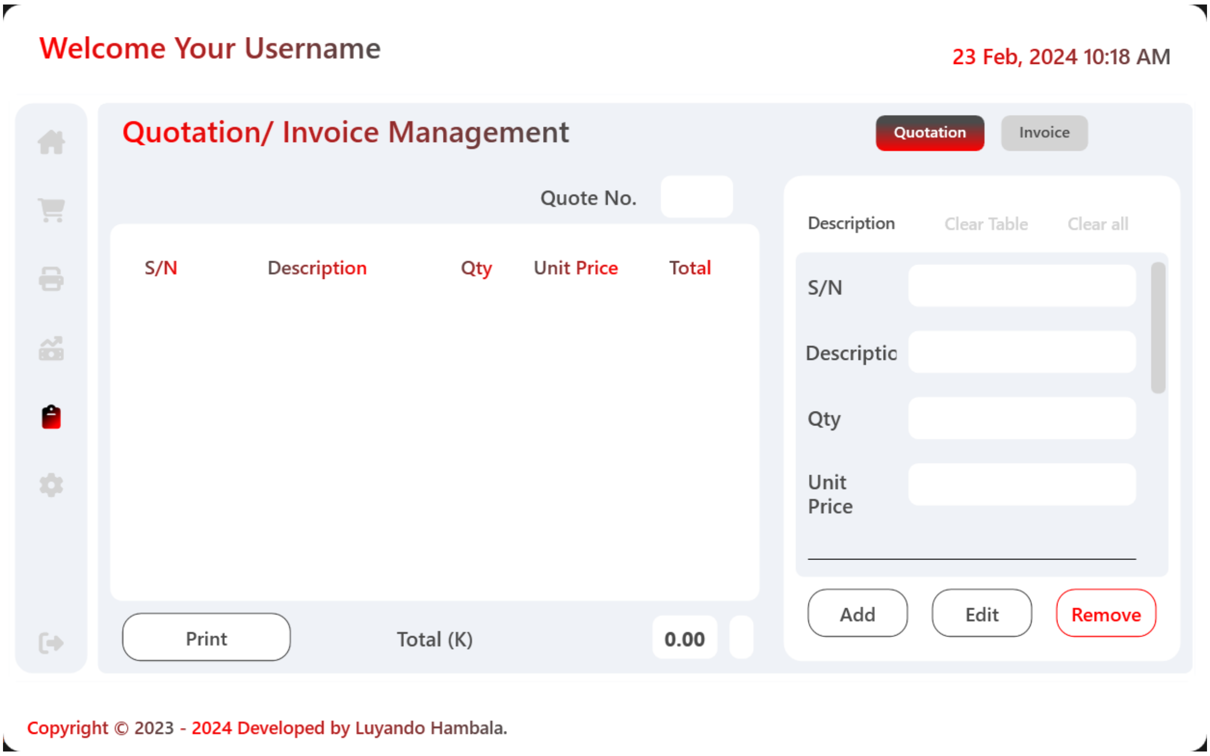
To edit a product or service simply click on it from the table and click the **Edit** button to activate the editing feature, make any changes you need in the entry fields and click the **Save** button to save the changes.

To remove a product or service, simply click on it from the table and click the **Remove** button, upon successful deletion, you will be notified of the deletion.

To export the list of products or services to a Word document, simply click on the **Export To** button and waiting for the prompt to notify you of the completion upon successful exportation.

To prepare the closing stock and sales report, simply click the **Closing Report** button and wait for the completion prompt.

Quotation and Invoice Management

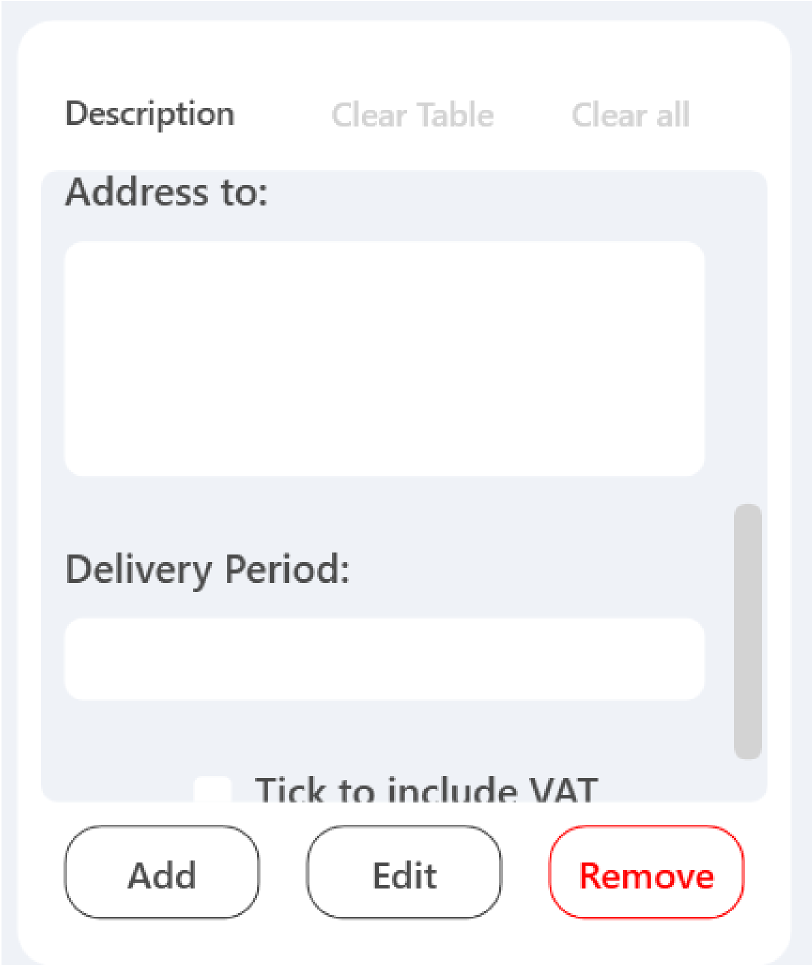


The Quotation and Invoice Management Page contains various simple and easy to use functions that allow the processing of quotations and/or invoices with the application.

To add an entry to the table simply fill in all the appropriate fields and click the **add** button. The newly added entry will appear in the table to the left of the screen.

To edit an entry simply click on the field in the table and click the **Edit** button. The details are then copied to the fields in the entry panel to the right of the screen. To append the changes made to the field, simply click the **Save** button and all changes made to that entry will be saved.

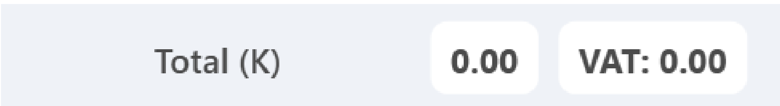
To delete an entry, simply click the specific field from the table and click the **Remove** button. You will be notified upon successful deletion of the field.



To fill in address block of the Quotation/Invoice, type in the details in the **Address to:** field, Spaces and New lines are enabled for ease of description.

To fill in the delivery period of the document, simply fill in the **delivery period** field.

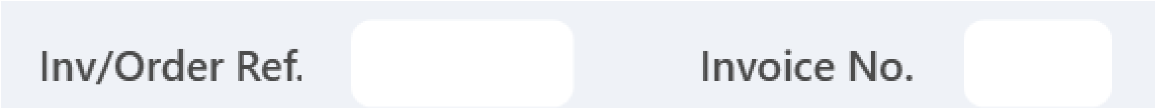
Tax value is also included in the panel, to utilise it, click the **Tick to include VAT** checkbox at the bottom of the entry panel.



After click the checkbox, the **VAT** field should appear at the bottom of the screen.

To clear all fields from the table, click the **Clear Table** button at the top right-centre of the entry field panel.

To clear all entry field values, click the **Clear all** button at the top far right of the entry field panel.

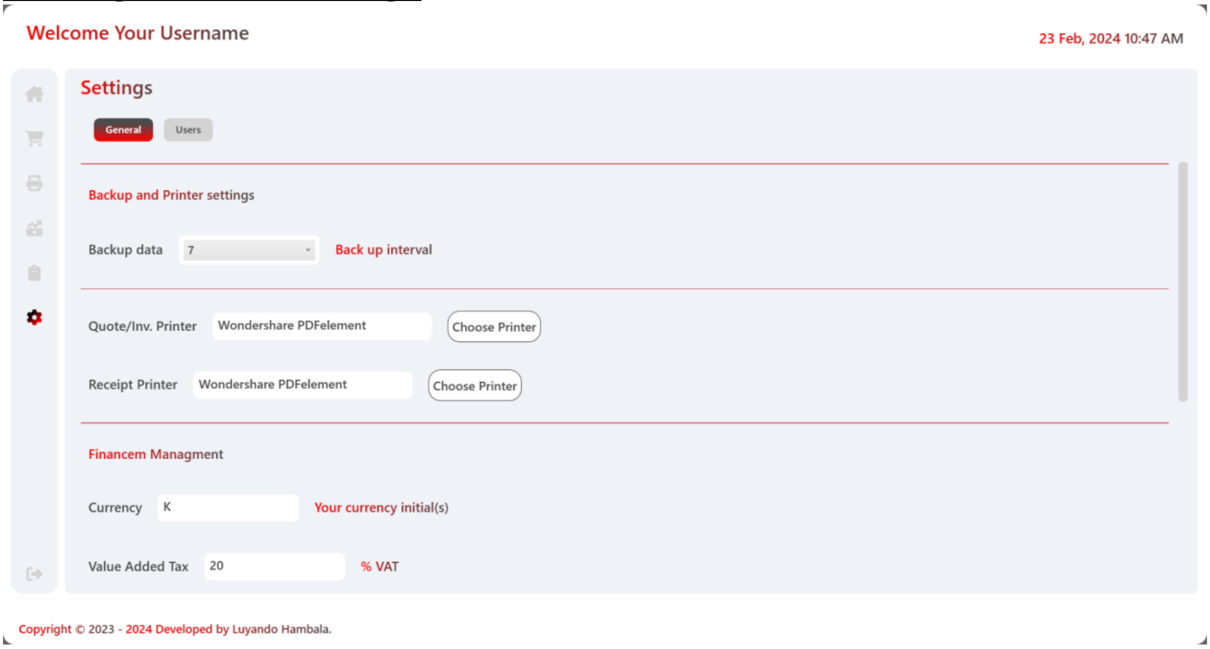


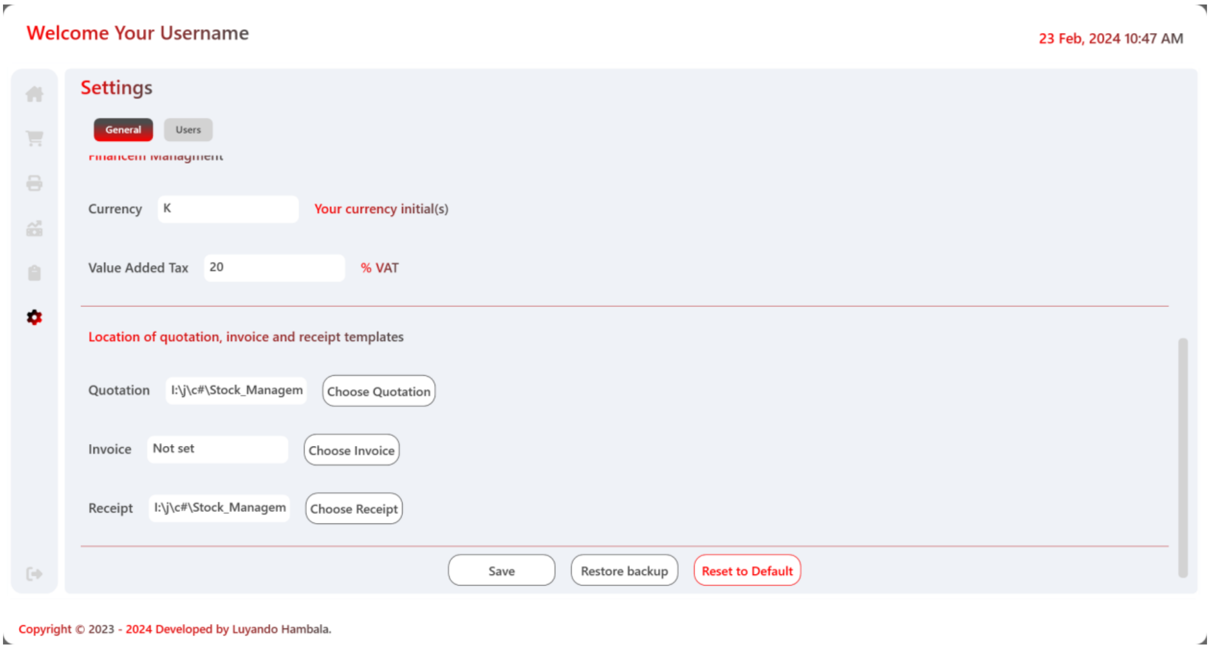
To fill in the Invoice/Order Ref field simply click the **Invoice** button on the top right of the screen and the required fields for invoice management will appear at the top of the table.

To navigate between views (Quotation and Invoice) simply click the required view button on the top right corner of the application.

Once all working has been done, to print the document simply click the **Print** button at the bottom left of the screen.

Settings and User Page





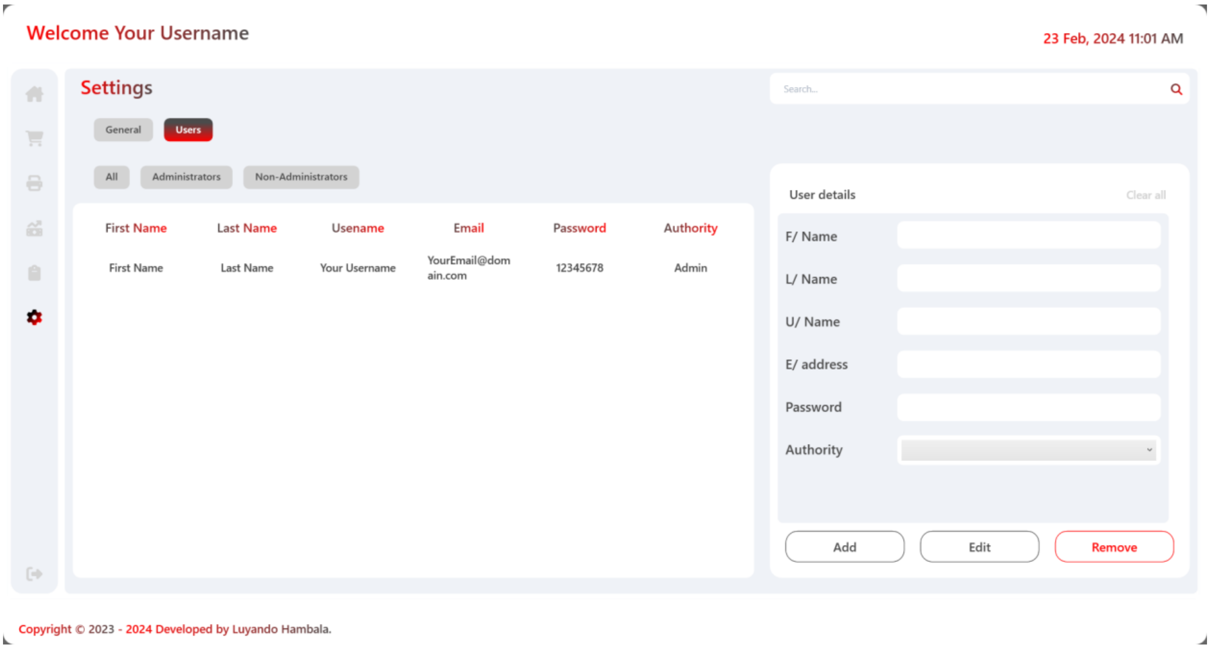
The settings page contains various fields that help personalise the application to the users preferences.

Some of the features include the Quotation, Invoice and Receipt templates which provide an environment for the application to utilise when printing.

The tax and currency fields are used to calculate tax and display the appropriate currency to be utilised throughout the application.

The Quotation/Inv. printer and Printer Settings allow the user to choose which printer is used for the processing of the specific task to be carried out.

Note: All printing services run by the application require templates for each specific print to be carried out.



The **User Tab** contains a list of users currently registered on the platform. To add users to the system. Simply click the **add** button after filling in all the appropriate fields on the entry panel to the left of the screen.

To edit a field, simply click on an entry field and make changes in the fields on the left of the screen in the entry panel.

To remove an entry, click on the field to remove and click the **Remove** button. You will be prompted after a successful deletion.

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