USER'S MANUAL

Marine Sales and Services Management System

March 2018

TABLE OF CONTENTS

1.0   GENERAL INFORMATION

1.0   GENERAL INFORMATION

1.1   System Overview

The Marine Sales and Services Management System (MSSMS) is a web-based system that provides a dedicated database that will act as storage and backup instead of relying just with physical file vaults that consumes space in the office.

The system will provide paperless data input and record keeping but at the same time print output forms that the management will use for signing and confirming job and purchase orders. The proponents also aim to lessen the time consumed with the use of transaction forms within the system. It will also help the user in viewing the list of their current products and services.

1.2   Acronyms and Abbreviations

Mac OS – Macintosh Operating Systems that was developed and marketed by Apple Inc.

MySQL – This is a free SQL database used to store all information for each student.

2.0   SYSTEM SUMMARY

2.0   SYSTEM SUMMARY

2.1   System Configuration

The employees uses computer running Mac OS. Those computers will be used to run the MSSMS web-based application together with the MySQL database software. Although the system can run without internet, their computers will be connected to it for better performance
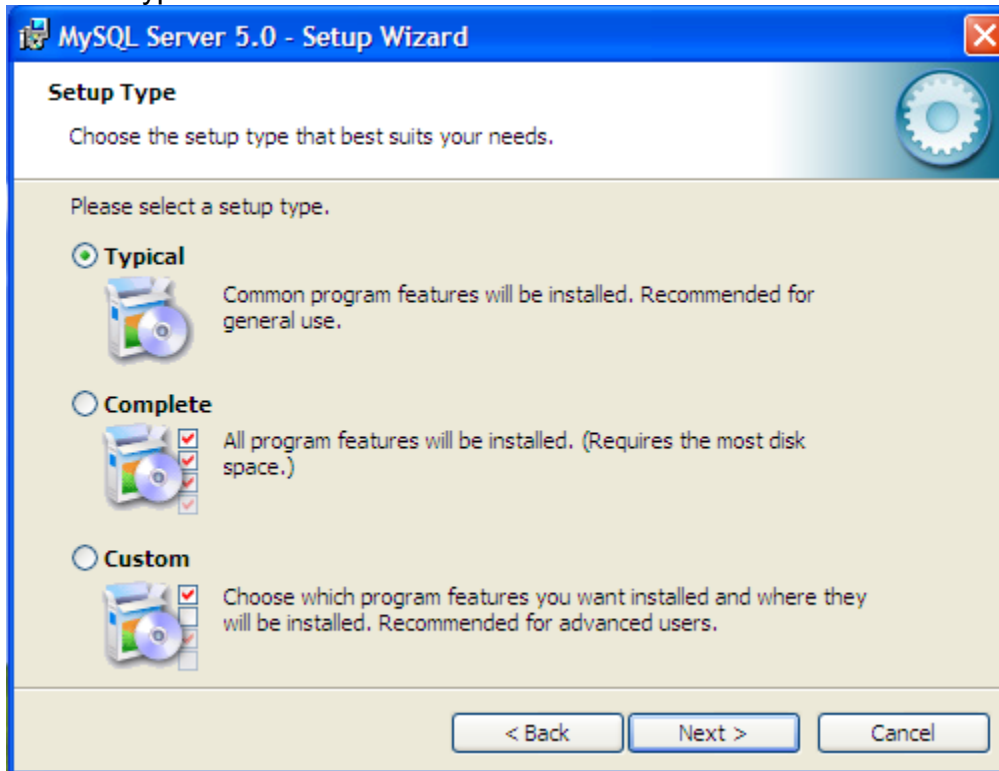

Web Hosting
Services

Internet

Computer
(Admin)

3.0   GETTING STARTED

3.0 GETTING STARTED

3.1 Setting up MySQL

We first start by running "MySql-setup.exe". This will begin the installation of MySQL.

-Select "Typical" installation then click the "Next >" button

-Click the "Install" button to begin installation
-Once the installation completes click "Next >" twice
-Now insure "Configure the MySQL Server now" check box is selected and press "Finish"

-Click "Next >" on the Configuration Wizard to begin the configuration
-Select the radio button "Standard Configuration" and click "Next >"
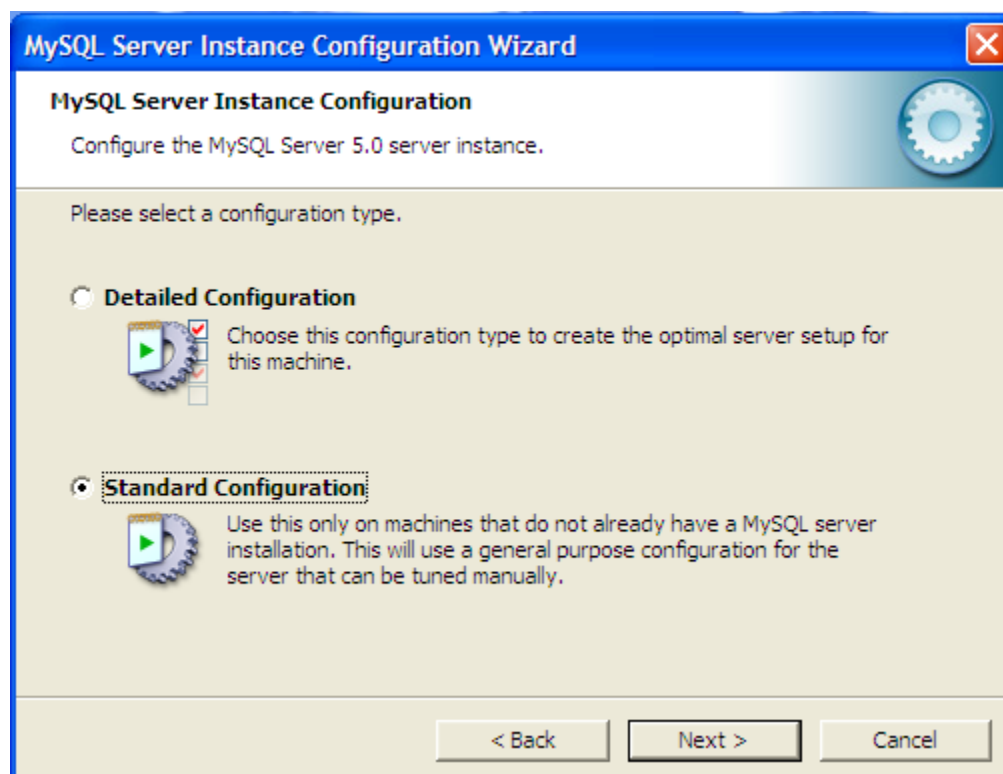
-Ensure "Install As Windows Service" checkbox is checked, the service name is "MySQL" and "Launch the MySQL Server automatically" is checked. Also make sure "Include Bin Directory in Windows PATH" checkbox is checked. Click "Next >" to continue

-Now make sure "Modify Security Settings" and "Enable root access from remote machines" is the only two check boxes selected. Input the desired password that only the administrator will know. This password will be used setting up the database tables. The username for the root account is "root".

-Click "Next >" then "Execute" to setup the MySQL server with the specified settings.
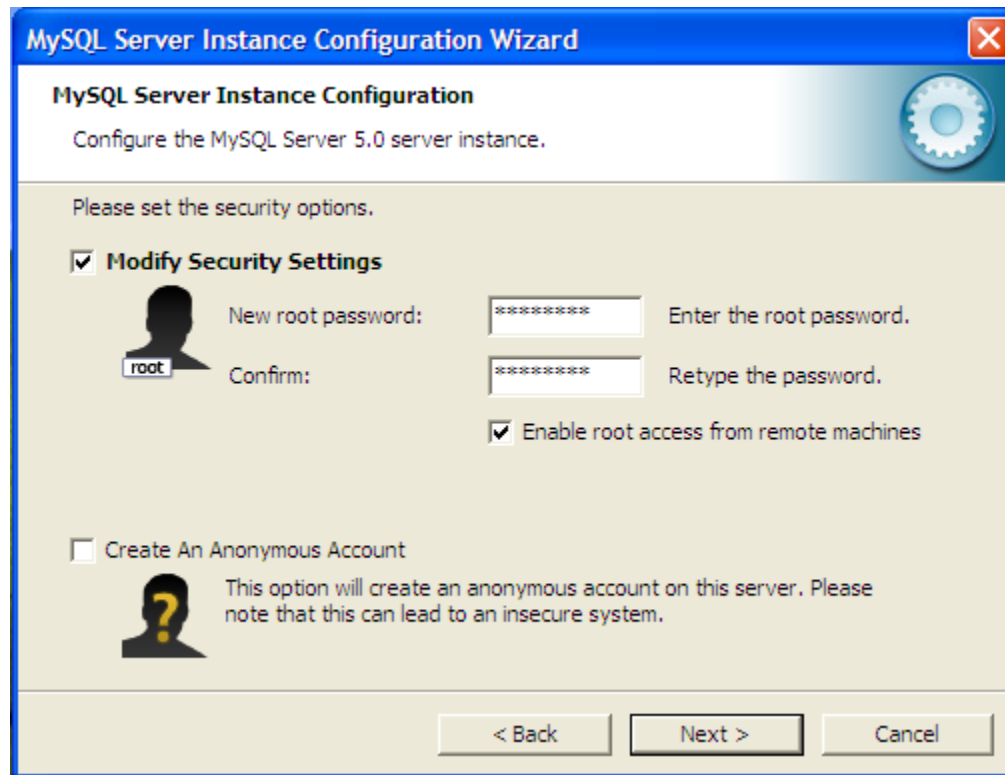
-Click "Finish" once the processing is complete.

4.0   USING THE WEB APPLICATION

4.0   USING THE WEB APPLICATION

4.1   Maintenance

4.1.1 Adding Supplier Record
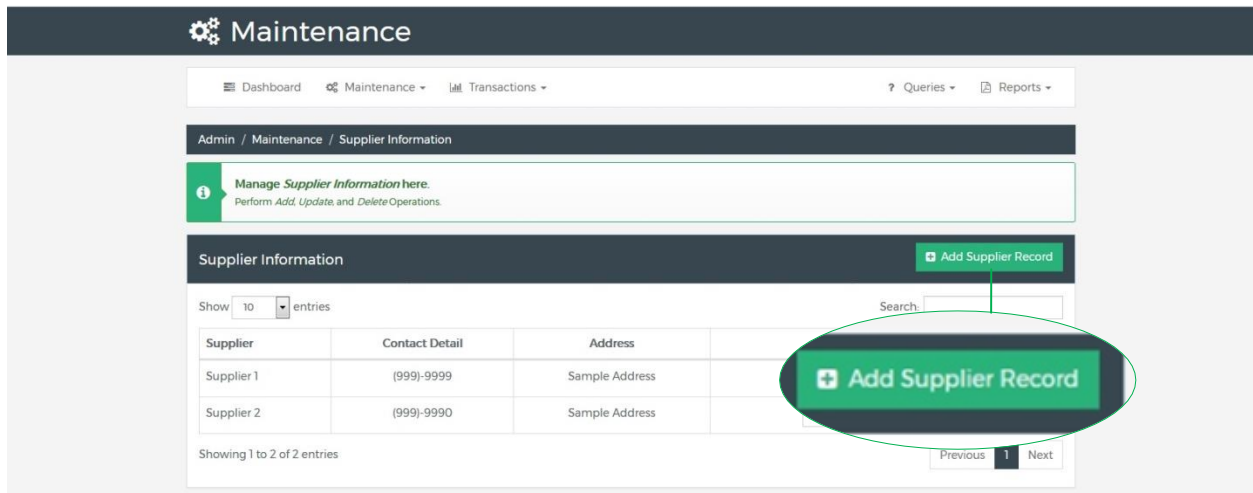
-Click the "Supplier Information" link from the maintenance menu, and the page shown above will be displayed
-Click the "Add Supplier Record"
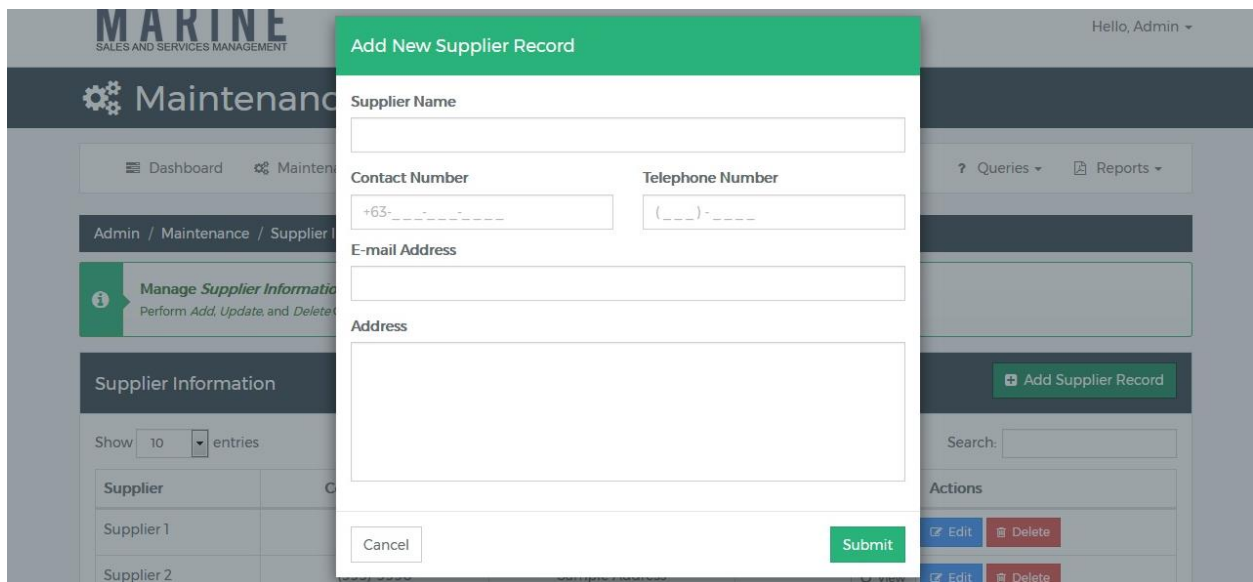
-Input Supplier Name, Contact Number, Telephone Number, E-mail Address and Address.
-Click Submit to save the information
-Upon clicking the submit button, the new record will be displayed in the Supplier Information Table and can be edited or deleted.

4.1.2 Adding Product Details
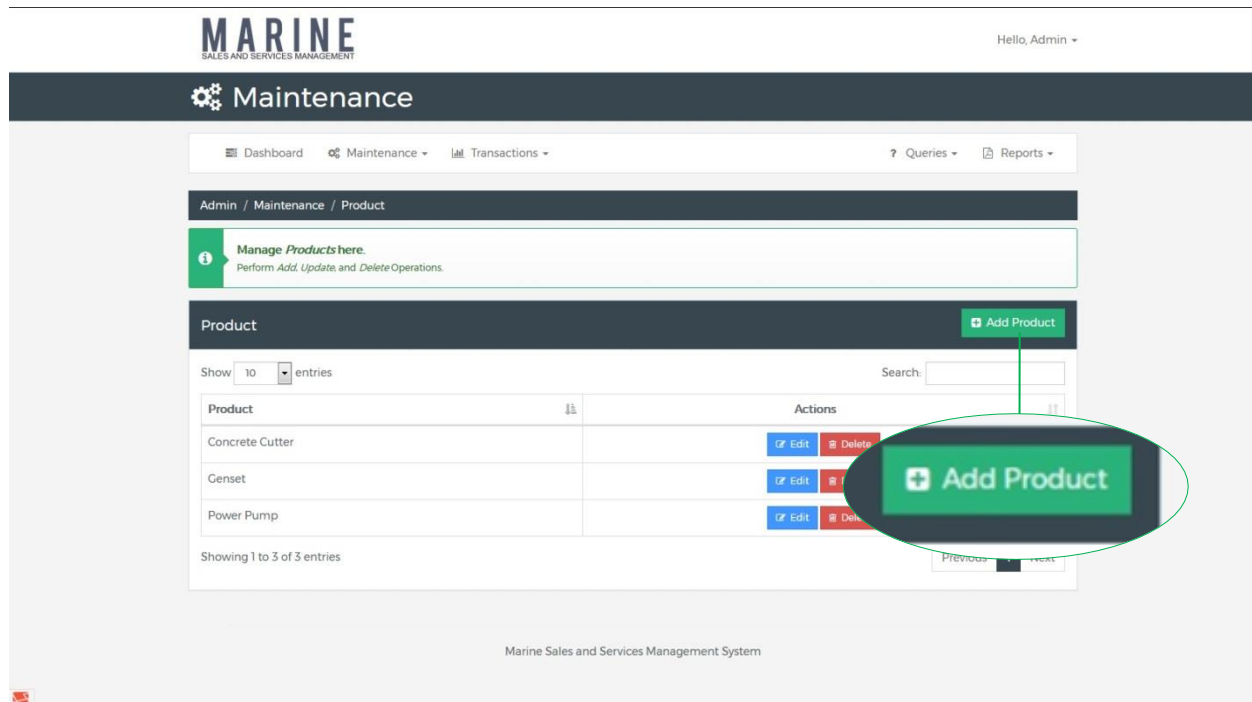
-Click the "Product" link from the maintenance menu, and the page shown above will be displayed
-Click the "Add Product"
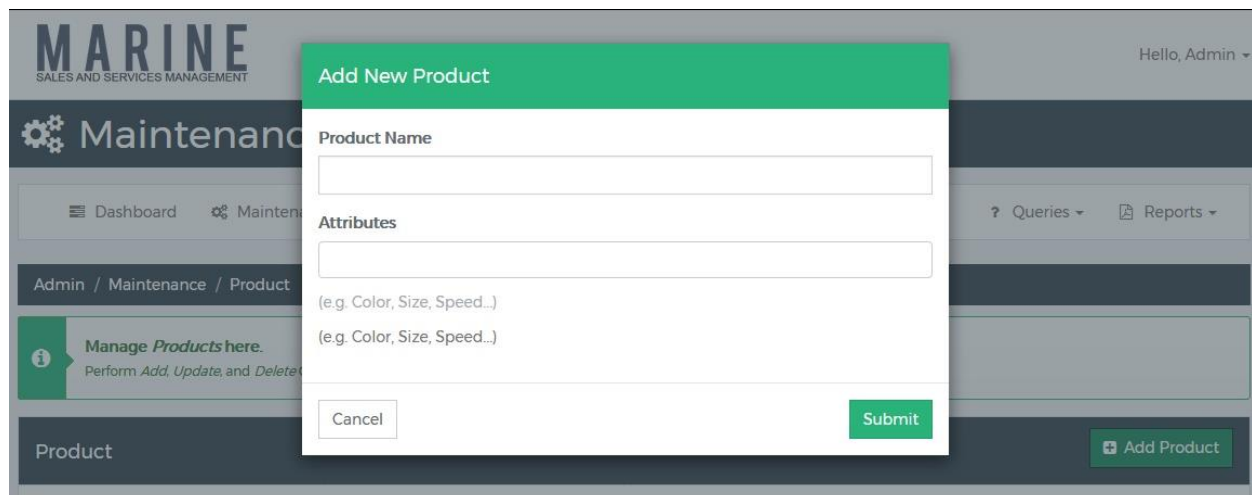
- Input Product Name and its Attributes. Attributes can have multiple entries
-Click Submit to save the information
-Upon clicking the submit button, the product can be viewed in the Product Table and can be edited or deleted.

4.1.3   Adding Product Variants
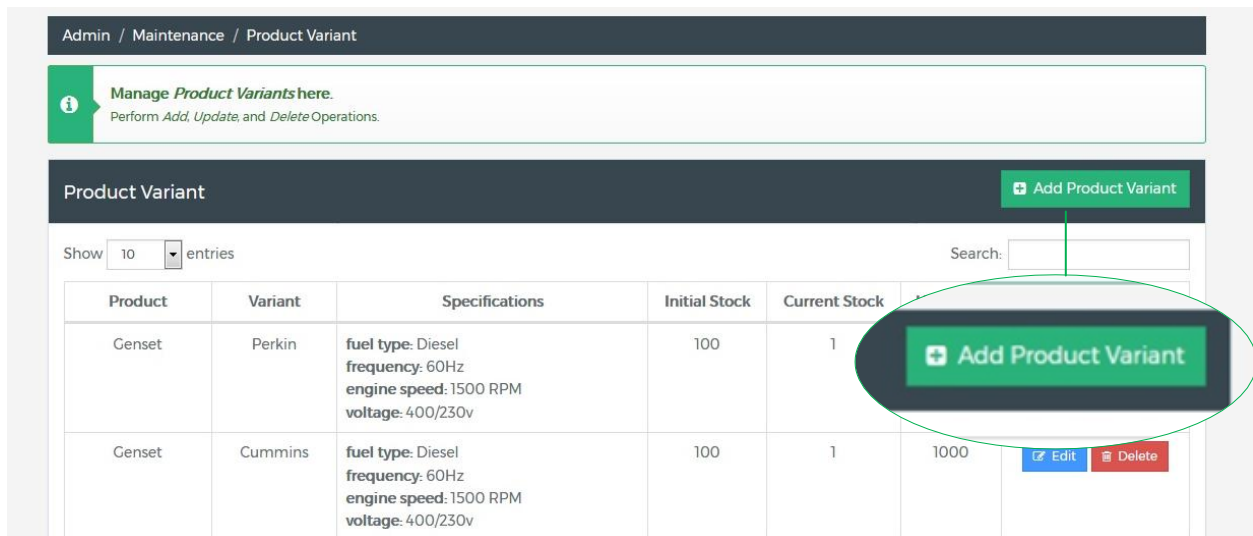
-Click the "Product Variant" link from the maintenance menu, and the page shown above will be displayed
-Click the "Add Product Variant"
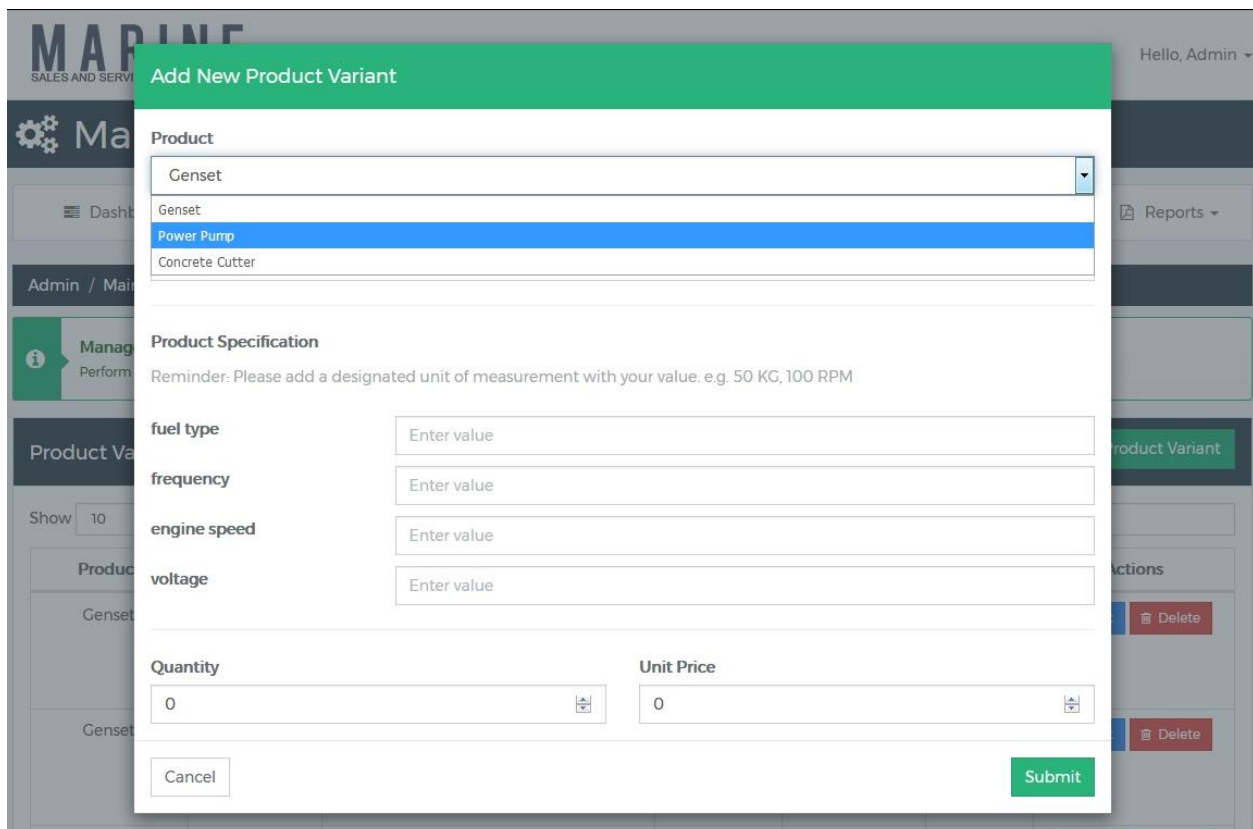
-Select Product
-Input Product Specifications, Quantity and Unit Price
-Upon clicking the submit button, the data will be saved and can be viewed in the Product Variant Table where it can be edited or deleted.

4.1.5 Adding Position
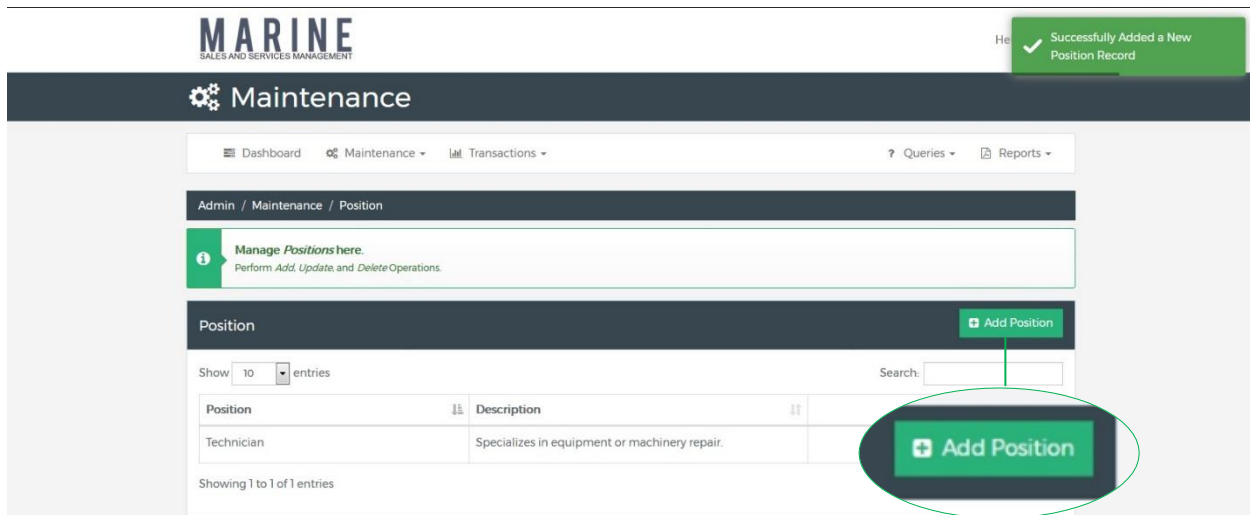
-Click the "Position" link from the maintenance menu, and the page shown above will be displayed
-Click "Add Position"
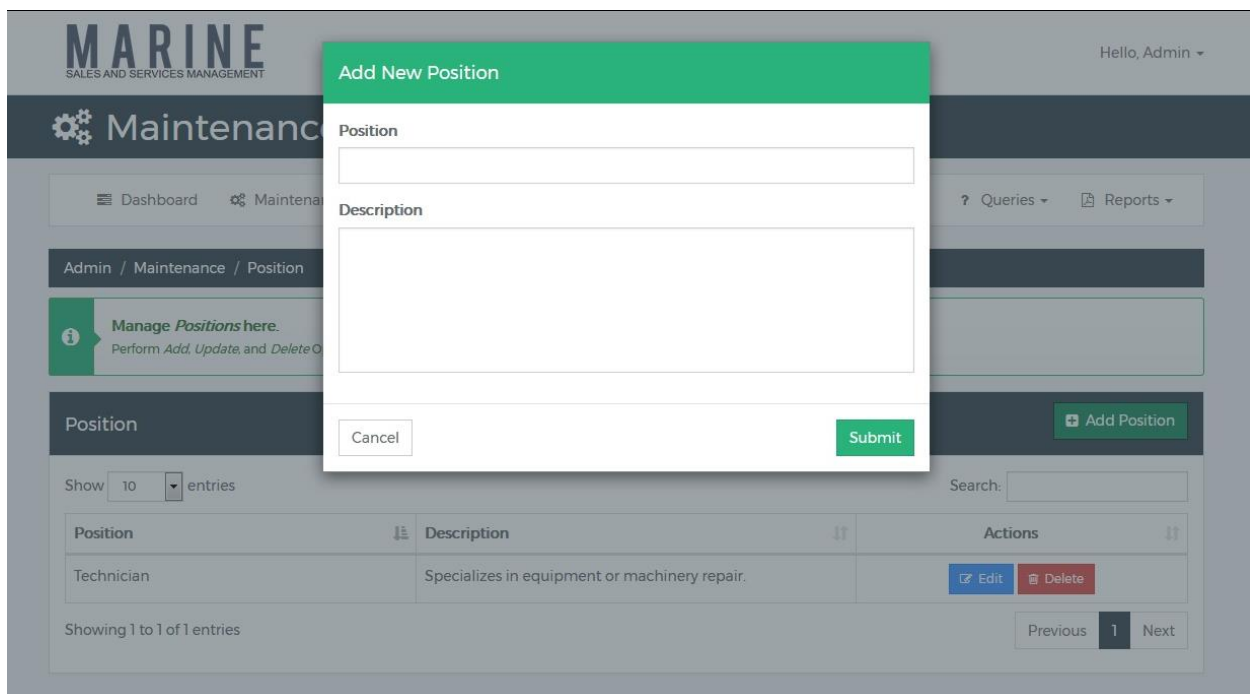
-Input Position and Description
-Upon clicking the submit button, the data will be saved and can be viewed in the Position Table where it can be edited or deleted.

4.1.6 Adding Personnel Record
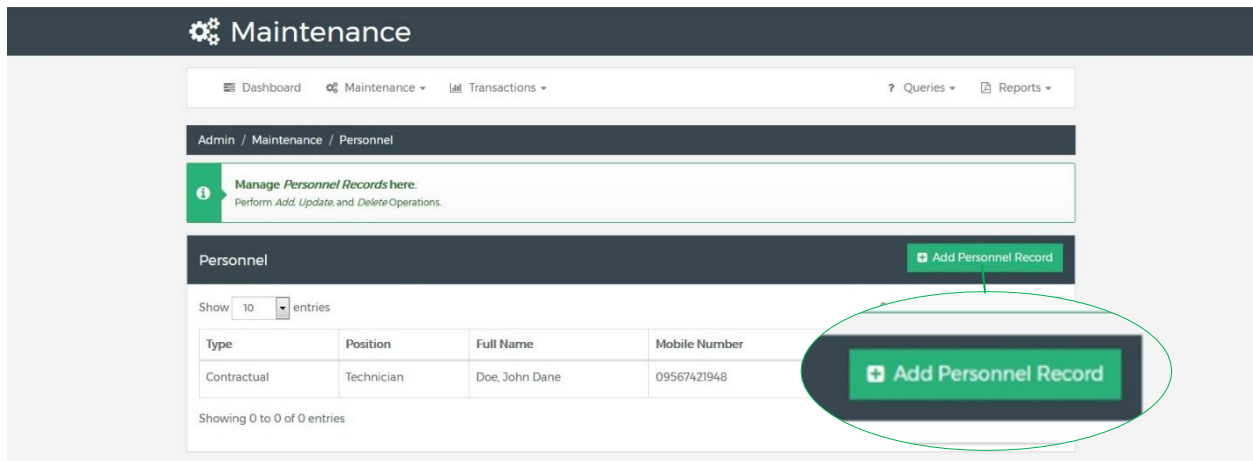
-Click the "Personnel" link from the maintenance menu, and the page shown above will be displayed
-Click "Add Personnel Record"
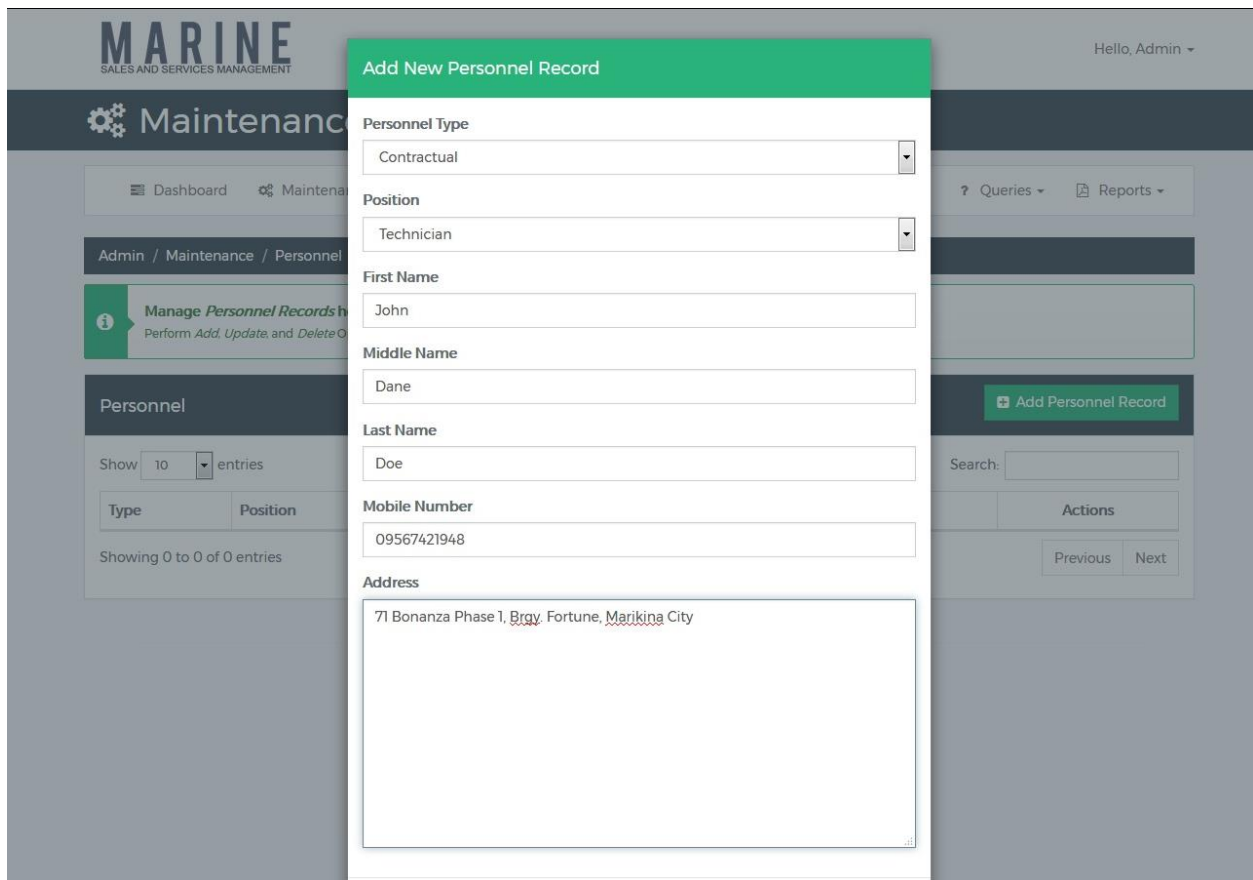
-Select Personnel type and Position
-Input First Name, Middle Name, Last Name, Mobile Number and Address
-Click Submit to save
-Upon clicking the submit button, the new personnel record will be displayed in the Personnel Table and can be edited or deleted.

4.1.7 Adding Service
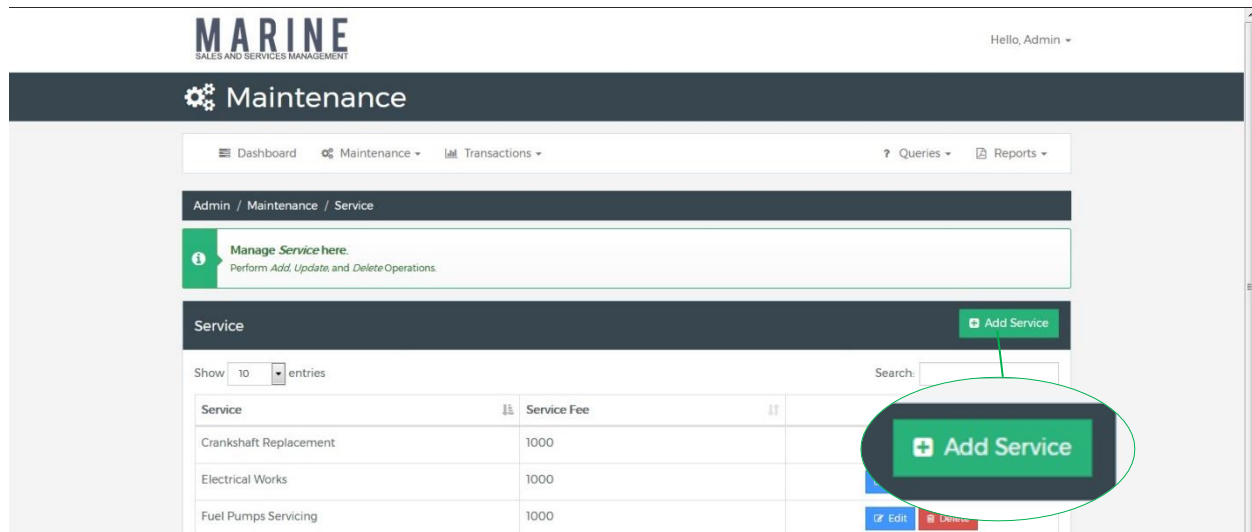
-Click the "Service" link from the maintenance menu, and the page shown above will be displayed
-Click "Add Service"
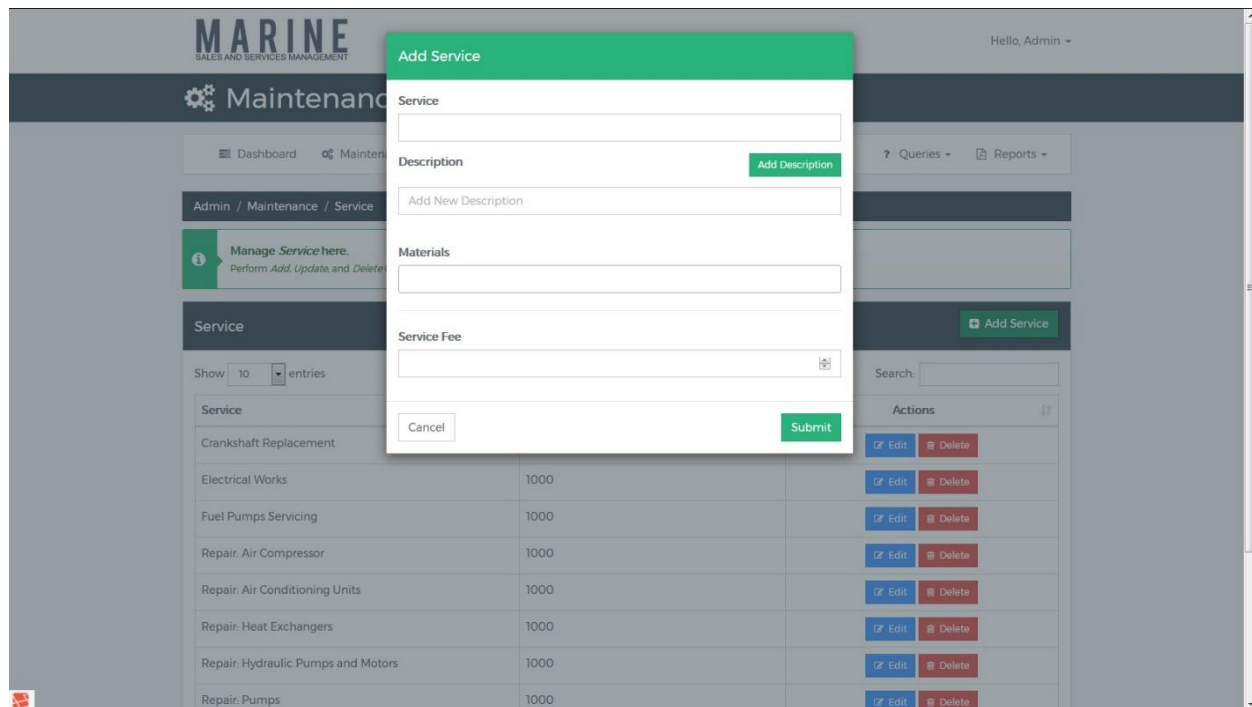
-Input Service Name
- Add description by typing it and clicking the "Add description button"
-Input Materials needed in the service and the fee
-Click Submit to save
-Upon clicking the submit button, the new service will be displayed in the Service Table and can be edited or deleted.

4.1.8   Adding Downpayment
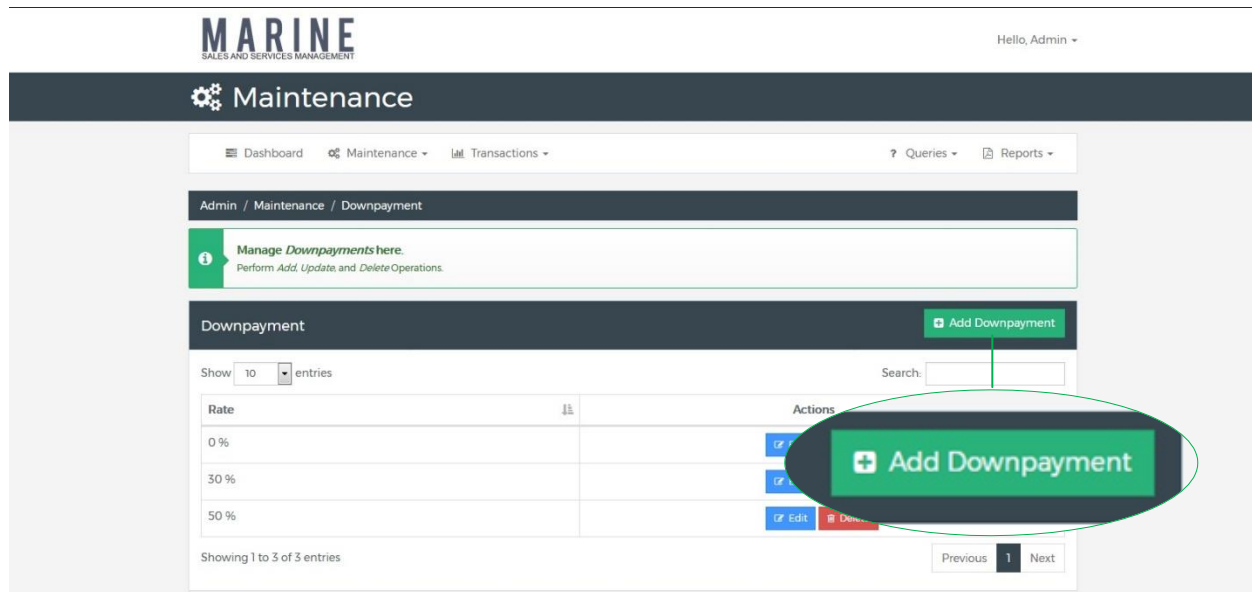
-Click the "Downpayment" link from the maintenance menu, and the page shown above will be displayed
-Click "Add Downpayment"
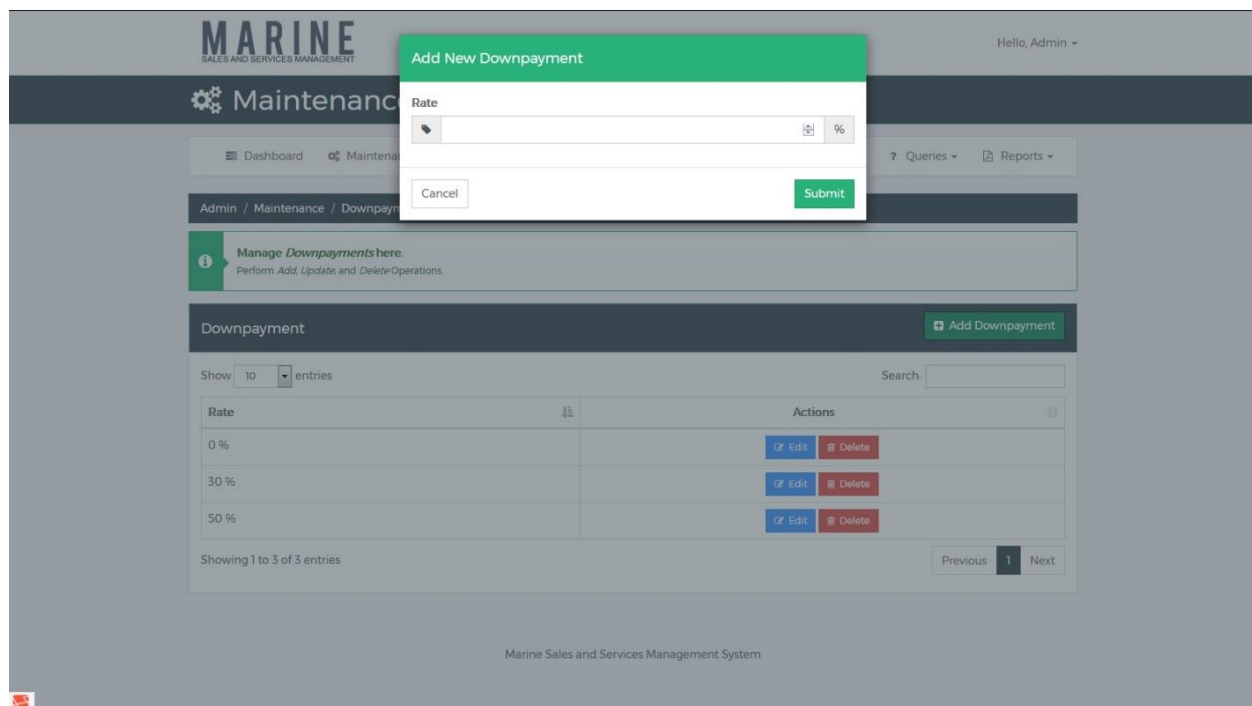
-Input Rate and click submit
-Upon clicking the submit button, the data will be displayed in the Downpayment Table and can be edited or deleted.

4.1.9 Adding Discount

-Click the "Discount" link from the maintenance menu, and the page shown above will be displayed
-Click "Add Discount"
-Input Discount Name and Rate then click submit
-Upon clicking the submit button, the data will be displayed in the Discount Table and can be edited or deleted.

4.1.10 Adding Payment Term

-Click the "Payment Term" link from the menu, and the page shown above will be displayed
-Click "Add Payment Term"
-Input Payment Term Name, Rate and Days then click submit
-Upon clicking the submit button, the data can be viewed in the Payment Term Table and can be edited or deleted.

4.2   Transactions

4.2.1   Adjusting Stock
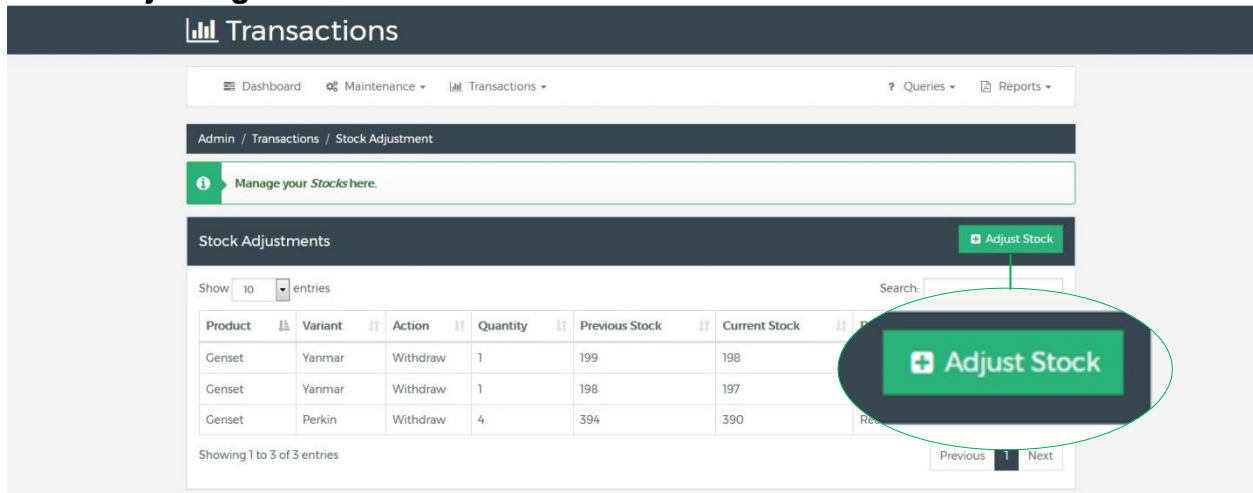
-Click the "Stock Adjustment" link from the transactions menu, and the page shown above will be displayed
-Click "Adjust Stock"
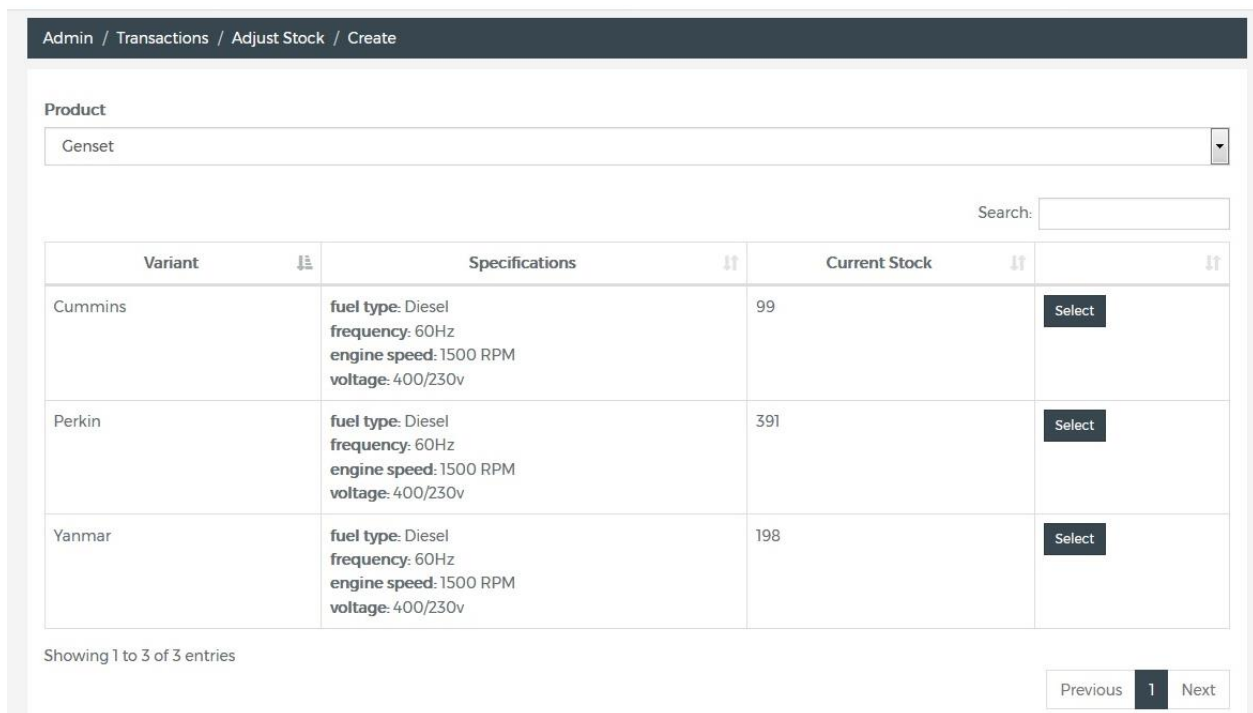
-Select product. The selected product will serve as a filter to the list of products below it
-After selecting a product, list of products with its specifications and current stock will be shown

-Click "Select". You can deselect it by clicking the "Remove" button
-Selected Items can be seen at the lower part of the page
-Under selected items. Input quantity and choose action then state the reason
-Click submit to adjust the stock of the selected items

4.2.2 Replenish Stock

-Click the "Stock Replenishment" link from the transactions menu, and the page shown above will be displayed
-Click "Replenish Stock"

-Select supplier and product. Your selection will serve as a filter to the list of products below it
-After selecting, list of products with its specifications, current stock and price will be shown

-Click "Select" to select items. You can deselect it by clicking the "Remove" button
-Selected Items can be seen at the lower part of the page
-Under selected items. Input quantity and Unit Price
-Click submit to replenish the stock of the selected items

4.2.3   Adding Client Record
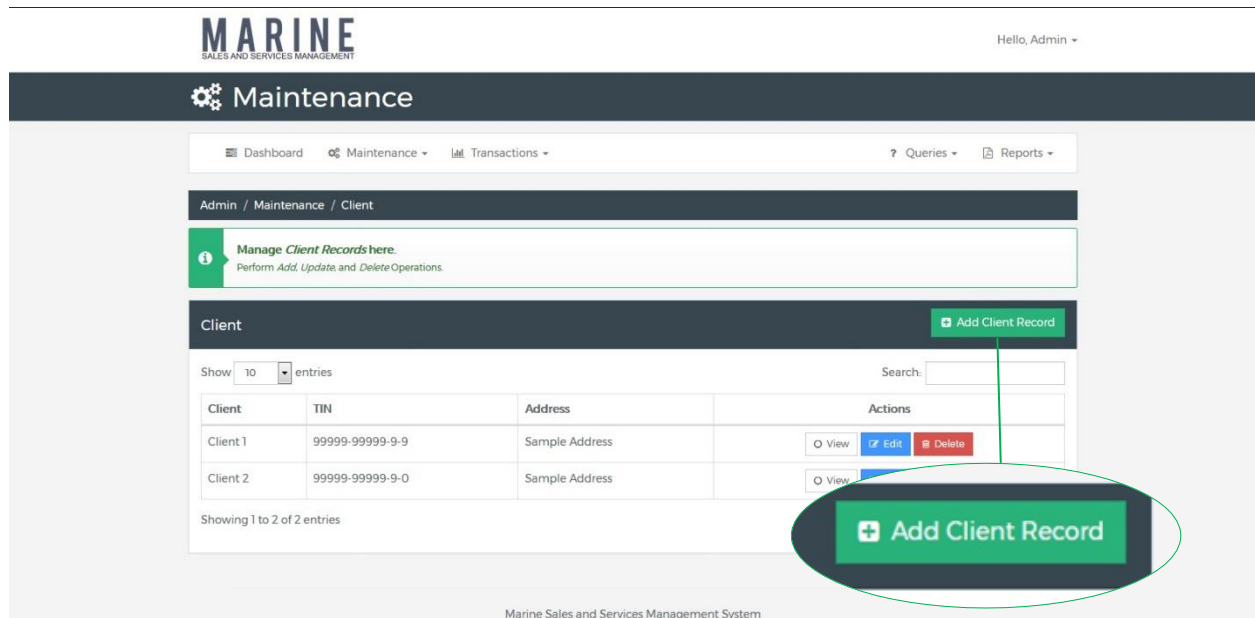
-Click the "Client" link from the transactions menu, and the page shown above will be displayed
-Click "Add Client Record"
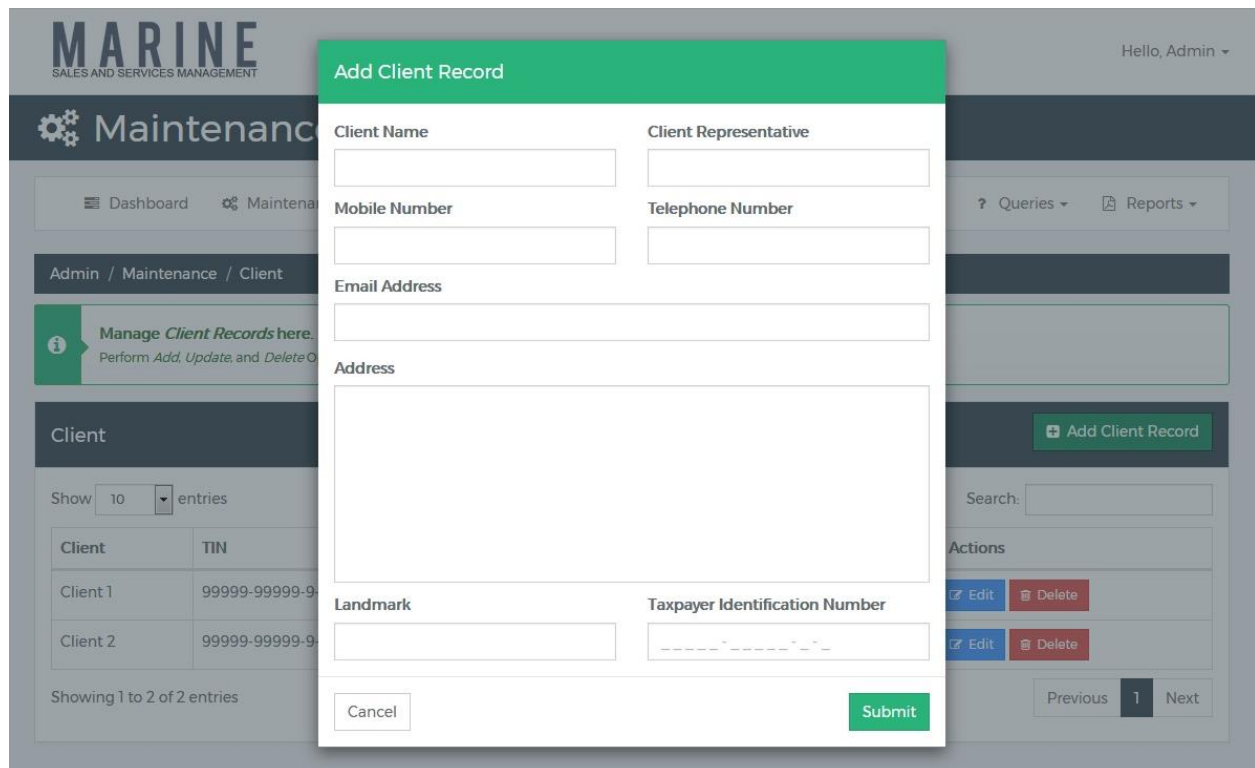
-Input Client Details then click submit
-Upon clicking the submit button, the data can be viewed in the Client Table and can be viewed, edited or deleted.

4.2.4   Processing Order

-Click the "Order Processing" link from the transactions menu, and the page shown above will be displayed
-Click "Process Order"

-If the client record is already in the system, choose "Existing Client"; if not you can input new client record by choosing "New Client"
-Click "Next" to proceed to Order Details

-Select order type and delivery type then input location and landmark
-Click next to proceed to Product Order

-Select product. Your selection will serve as a filter to the list of products below it
-After selecting, list of products with its specifications, current stock and price will be shown

	engine speed: 1500 RPM voltage: 400/230v				
Perkin	fuel type: Diesel frequency: 60Hz engine speed: 1500 RPM voltage: 400/230v	391		₱ 1,000.00	Remove
Yanmar	fuel type: Diesel frequency: 60Hz engine speed: 1500 RPM voltage: 400/230v	198		₱ 1,000.00	Remove

Showing 1 to 3 of 3 entries

Previous **1** Next

Selected Items

Product	Variant	Current Stock	Price	Quantity	Cost	Remarks	
Genset	Yanmar	198	₱ 1,000.00	1	₱ 1,000.00	Remarks	Remove
Genset	Perkin	391	₱ 1,000.00	1	₱ 1,000.00	Remarks	Remove

Previous Next Finish Cancel

-Click "Select" to select items. You can deselect it by clicking the "Remove" button
-Selected Items can be seen at the lower part of the page
-Under selected items. Input quantity and remarks
-Click next to proceed to Terms & Conditions

MARINE
SALES AND SERVICES MANAGEMENT

Hello, Admin ▾

📊 Transactions

≡ Dashboard   ⚙ Maintenance ▾   📊 Transactions ▾   ? Queries ▾   📄 Reports ▾

Admin / Transactions / Order Processing / Create

Client Information   Order Details   Product Order   Terms & Conditions   Summary

Mode

Cash

Discount *₱ 2,000.00 * 0% = ₱ 0.00*

No Discount (0%)

Downpayment *(₱ 2,000.00 - ₱ 0.00) * 0% = ₱ 0.00*

0%

Term *₱ 2,000.00 within 0 days*

Upon Receipt (0 days - 100%)

Previous Next Finish Cancel

-Under Terms and Conditions, select discount, downpayment and terms of payment
-Click Next to view summary

-You can check the order with the summary, click "Previous" if you want to edit some information
-Click "Finish" to save the order

4.2.5 Generating Invoice

-Select the invoice, then click "Select" button
-After selecting an invoice, a preview of the document will be displayed

-Click "Print Invoice" to print

4.2.6   Processing Payment

-Click the "Process Payment" link from the transactions menu, and the page shown above will be displayed
-Click "Process Payment"

-Select Order then input the amount and the date it was received
-Click "Submit" and summary of payments will be displayed. Each can be viewed by clicking the "View Receipt" button

-Click "Next" to Finish

-The picture above is a sample of a Payment Receipt

4.2.7 Processing Refund

-Click the "Process Refund" link from the transactions menu, and the page shown above will be displayed. Then click "Process Refund"
  -Select Invoice. Then, input quantity and the name of the person who processed it
-Click "Submit"

4.2.8 Setting Delivery Schedule

-Click the "Delivery" link from the transactions menu, and the page shown above will be displayed
-Click "Set Delivery Details"

-Input date and select personnel in charge then click set
-The schedule of the delivery can be viewed on the "Delivery Schedule" column

4.2.9 Processing Deployment

-Click the "Process Deployment" link from the transactions menu, and the page shown above will be displayed
-Click "Set Delivery Schedule"
-Select Order Number and Service Order
-Input date for Mobilization and De-mobilization
-Click submit to save schedule

4.3 Queries

4.3.1 Clients

-Click the "Clients" link under the "Queries", and the page shown above will be displayed
-The query can be filtered by Client Name, Client Representative Name, Tax Identification Number and Nearby Landmark. Fill up the fields you want to use as filter.
-Click "Filter"

-After clicking filter, the system will display a list in accordance to the values the user has entered.
-This can be saved as CSV, Excel, and PDF and can be printed

4.3.2 Orders

-Click the "Orders" link under "Queries", and the page shown above will be displayed
-The query can be filtered by Client, Client Representative Name, Order Number and Nearby Landmark. Fill up the fields you want to use as filter.
-Click "Filter"

-After clicking filter, the system will display a list in accordance to the values the user has entered.
-This can be saves as CSV, Excel, and PDF and can be printed

4.4 Reports

4.4.1 Generating Stocks Report

-Reports can be found on the upper right corner of the menu bar
-Under reports, click "Stock Report"
-Select date or range of date
-This can be saved as CSV, Excel, and PDF and can be printed. Click any and a box will appear

-The user can open it or save it.
-To open, select "Open with" then choose an application
-To save, select "Save File" then click "OK"

4.4.2 Generating Sales Report

-Reports can be found on the upper right corner of the menu bar
-Under reports, click "Sales Report"
-Select date or range of date
-This can be saved as CSV, Excel, and PDF and can be printed. Click any and a box will appear

-The user can open it or save it.
-To open, select "Open with" then choose an application
-To save, select "Save File" then click "OK"