User's Manual

Procurement Module

CROMA
AND
SONS

PROCUREMENT MANUAL

TABLE OF CONTENTS

3.0 PROCUREMENT REFERENCE

3.2 Purchase Report

Clicking "Purchase Report" on the sidebar will redirect the user to the Purchase Report page. The Purchase Report contains all of the recorded purchases done by the company. The timeline of the purchases can be viewed weekly, monthly, and yearly. To do this, the user must click the labels that is displayed in the picture below.

Weekly	Monthly	Yearly

The user can also search the table for a specific data. A search bar on the top right side of the table is provided as an input field for the user. The search can range from an integer, date, string, and decimal. Clicking the Delivery Receipt number redirects the user to the actual Delivery Receipt.

Delivery Receipt #	Delivery Date (Year-Month-Day)	Supplier
4	2016-12-06	BGM

The data displayed in the report are all gathered in the Delivery Receipt. Every time a new Delivery Receipt is submitted, the system automatically audits the data in and transfers it in the Purchase Report.

3.0 PROCUREMENT REFERENCE

3.1 Supplier List

Clicking "Supplier List" on the sidebar will redirect the user to the Supplier

List page. The Supplier List contains all of the recorded suppliers by the

company. It contains all the necessary information needed by the user for

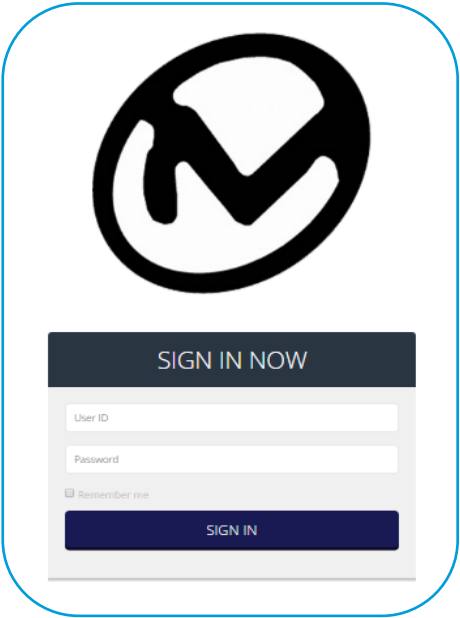procurement purposes. The user can add new suppliers, edit, and delete.

To add a new supplier, simply click the button below the header. Clicking the

button with the label "Add New +" will create a new row in the supplier list's

table. This means that the user can now add a new supplier in the system.

All necessary information have assigned input fields, the user inputs the data

on the designated input fields. Once done, the user must click the save button

located on the right side of the row. To edit or delete a supplier, simply click

the Edit or Delete text in the rightmost side of the row.

1.0 GETTING STARTED

1.1 Logging in to the System

The first screen that is displayed to the user is the log in screen. To access the Procurement Module, input the assigned username and password that is provided to you by the Administrator. After inputting the information on the right fields, click the log in button to proceed. A pop-up will display if you have tried to click the log in button but have encountered errors.

List of possible errors:

Please fill out this field— There is nothing written on the text field. Input your username or password in the designated text field.

Username is not associated to any account — The username does not match any existing records in the database.

Incorrect password or username— The password does not match any existing records in the database.

1.0 GETTING STARTED

1.2 Logging out to the System

Once the Procurement user is done with his duties on the system, the user must log out to protect the system and the company from unauthorized access of data. To log out simply click the button on the top right corner of the system. The button has the current user's name displayed to it. Once clicked, a button will appear directly below it. A green button with a symbol of a key and the word "Log Out" Labeled to it is the button that you would click if you want to log out of the system.
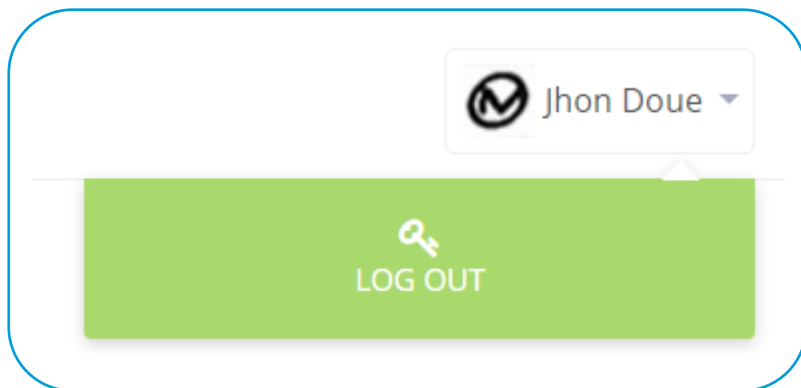
1.3 Basic Components

The Procurement module can be divided into three parts. The sidebar, the header, and the body. Each of the parts have specific modules that are grouped together. This would make it easier for the user to navigate which part of the systems he/she should go.

2.0 PURCHASE ORDER

2.2.2 Receive Purchase Order (Cont.)

At the bottom right of the page are monetary information. The user can input the discount in the discount field and it would be automatically reflected on the grand total just right below it. The user can only submit the delivery receipt after putting all of the of the information in the required input fields. The user must click the Submit Delivery Receipt button below the table to submit the delivery receipt.

2.0 PURCHASE ORDER

2.2.2 Receive Purchase Order

After choosing the Purchase Order to receive. The user will be redirected to the actual Receive Purchase Order page. Necessary purchase order details are displayed with its corresponding input fields. These details must be accomplished first before submitting the delivery receipt.

BILLING AND DELIVERY INFORMATION

Payment Terms : **Cash**
Delivery Address: **976 A. Bonifacio Ave, Balingasa, Balintawak, Quezon City**

SUPPLIER INFORMATION

Supplier Name : **Asia United Pinewood Corporation**
Supplier Address: **358 A. Bonifacio Circle, Monumento, Caloocan City**

Three main information categories are displayed in the page these are, Billing and Delivery Information, Supplier Information, and Purchase Order Information. The data presented are gathered from the database and the Purchase Order.

Quantity Rejected

7

The user must set the delivery date for the received Purchase Order. The input field can be found at the top of the body. Clicking the field will have a calendar pop-up which the user can then select the delivery date. The quantity received and the quantity rejected will turn red if the user tries to input any other data beside numbers. However, the system will not allow the user to input invalid data leaving the input field blank.

1.0 GETTING STARTED

1.3.1 Sidebar
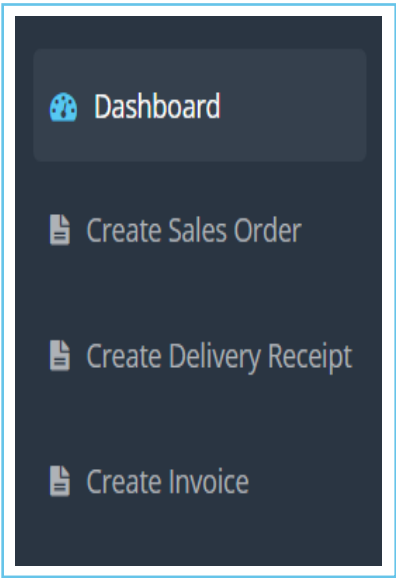
The Procurement sidebar serves as the navigation for the Procurement Module. A highlight box in one of the pages signifies that this is the current page that you are in. To navigate to another page, click one of the labels displayed in the sidebar. This would allow the user to be redirected to another page.

1.3.2 Header

≡ CROMAANDSONS   Jhon Doue ▾
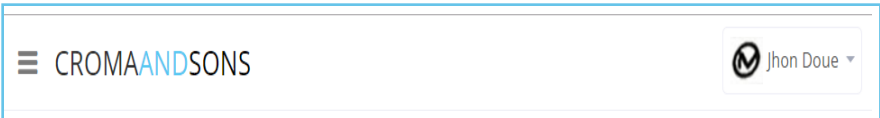
The left most button in the header will hide the entire sidebar when clicked. This is used when the user wants to remove the sidebar to conserve space for the body. The Croma and Sons label also serves as a home button and will immediately redirect you to the dashboard. Lastly, the right-most button in the header will prompt you to log out when clicked.

1.0 GETTING STARTED

1.3.3 Body

The body is the most important part of the system. The body consists of the content of the chosen page in the sidebar. This is where content is where the text fields, tables, and charts are located. The header consists of the title of the page or the title related to it.
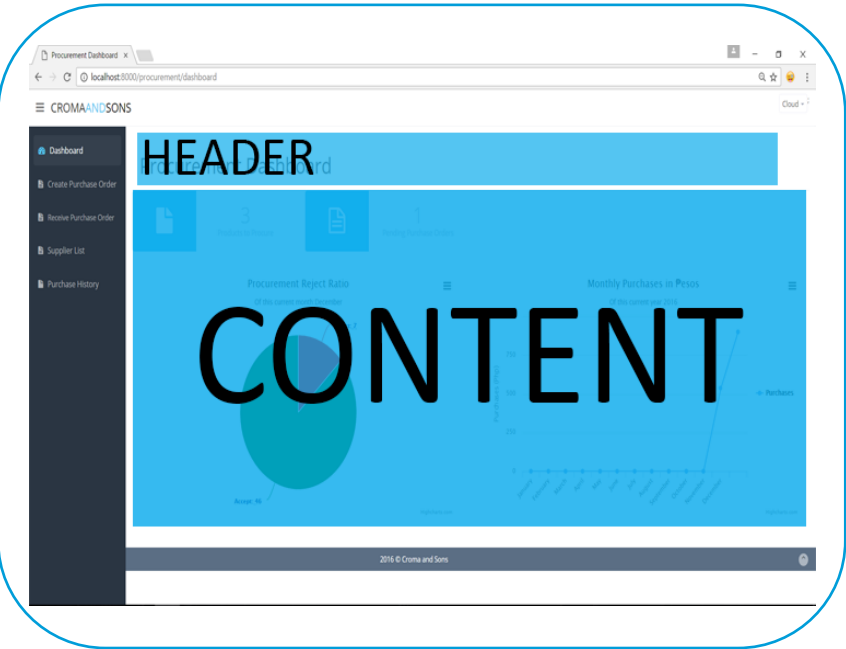
2.0 PURCHASE ORDER

2.1.2 Purchase Order (Cont.)

The user can only submit the purchase order after putting all of the of the information in the required input fields. The user must click the Submit Purchase Order button below the Order Items table to submit the purchase order. A notification on the top part of the body will pop-up notifying the user that the request is successful.
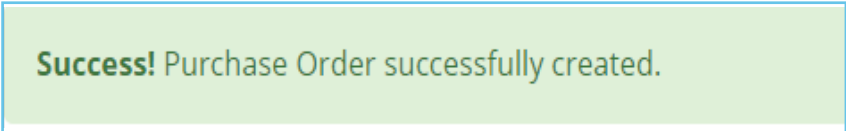
2.2.1 Receiving Purchase Order

Clicking "Receive Purchase Order" will redirect the user to the initial step for receiving a Purchase Order. In order to receive the actual Purchase Order, the user must first select the purchase order they want to receive. To do this, the user clicks the button on the rightmost side of the table that has a label of "Receive Purchase Order".

Purchase Order #	Date Created	Supplier	
6	2016-12-07 03:58:47	Asia United Pinewood Corporation	Receive Purchase Order
4	2016-12-07 00:46:01	Brothers Hardware	Receive Purchase Order
2	2016-12-06 18:14:17	6th Avenue Construction	Receive Purchase Order

2.0 PURCHASE ORDER

2.1.2 Purchase Order (Cont.)

Below the purchase order details are the reflected materials that the user chose in the previous page. The size in the previous page is now expounded into Thickness (in.) ,Width (in.), and Length (Ft.). The user is prompted to input the quantity and unit price for the materials. The quantity and the unit price input fields will turn red if the user tries to input any other data beside numbers. However, the system will not allow the user to input invalid data leaving the input field blank. At the bottom right of the Order Items table are monetary information. The user can input the discount in the discount field and it would be automatically reflected on the grand total just right below it.

1.0 GETTING STARTED

1.4 Dashboard Layout

The Procurement Dashboard is the homepage of the Procurement User and the first page the user will see. Below the header of the body are the notifications. Procurement Dashboard has two notifications, Products to Procure and Pending Purchase Order. Product to Procure notification when clicked will redirect to the "Create Purchase Order" page. On the other hand, Pending Purchase Order notification will redirect the user to "Receive Purchase Order" page.

Above the two notifications are the charts for Procurement Dashboard. The pie chart labeled "Procurement Reject Ratio" displays the accepted vs rejected materials for the current month. The line chart labeled "Monthly Purchases in Pesos" displays the trend of purchases for the current year. The button on the upper right of the charts allows the user to print the chart or to save it. Both charts gather data from by collecting the information done in Purchase Orders.
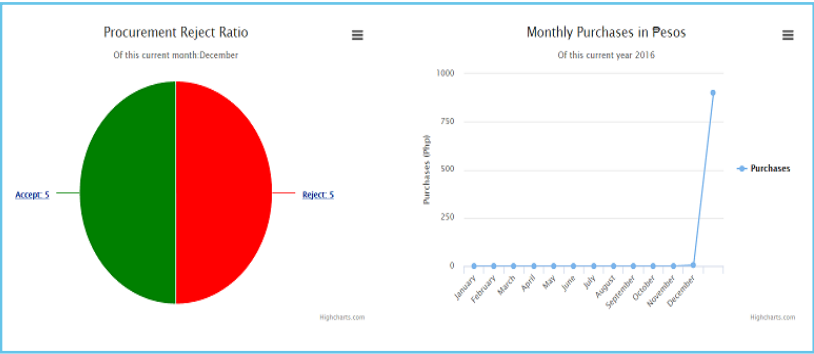
2.0 PURCHASE ORDER

2.1.1 Selecting Products

Clicking "Create Purchase Order" on the sidebar will redirect the user to the initial step for creating a Purchase Order. The user must first select the products that would be purchased in the list of materials.

To choose a product click one of the boxes located in the rightmost side of table. After clicking a box, a check will appear in the selected box displaying that you have selected this product. You can select multiple boxes for multiple products. After selecting all of the products needed for purchasing, click the button below the table that has a "Proceed to Purchase Order" label on it. Clicking this will redirect the user to the actual Purchase Order.

Possible Errors:

Warning! Please select a product before proceeding— No product has been selected. Click one of the product's box to select a product.

2.0 PURCHASE ORDER

2.1.2 Purchase Order

After choosing the products to procure. The user will be redirected to the actual Purchase Order page. Necessary purchase order details are displayed with their corresponding input fields. These details must be accomplished first before submitting the purchase order.

Possible Errors:

Please Select an Item in the list—Missing input/s in the purchase order's details. A red highlight will appear around the input field if there are no values inputted.