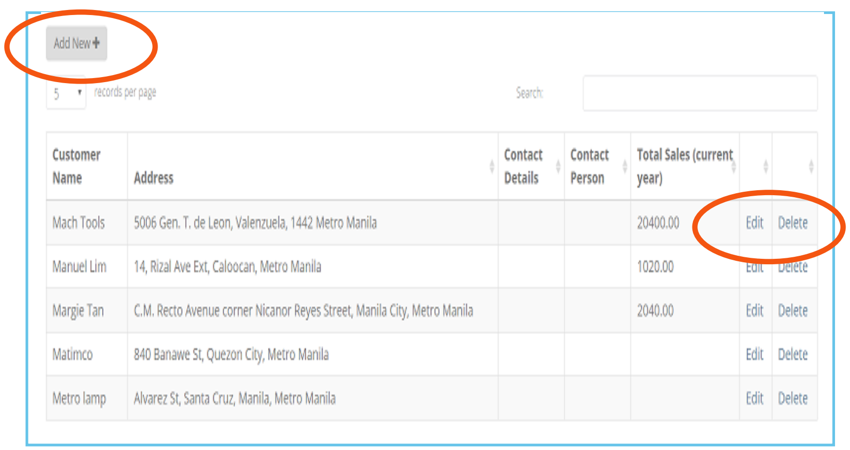
3.0 SALES REFERENCE

3.3 Customer List

Clicking “Customer List” on the sidebar will redirect the user to the Customer List page. The Sales Catalog contains all of the recorded customers of the company. It contains all the necessary information needed by the user for sales purposes. The user can add new customers, edit, and delete.

To add a new material, simply click the button below the header. Clicking the button with the label “Add New +” will create a new row in the sales list’s table. This means that the user can now add a new material 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.



Add New +

5 records per page

Search:

Customer Name	Address	Contact Details	Contact Person	Total Sales (current year)		
Mach Tools	5006 Gen. T. de Leon, Valenzuela, 1442 Metro Manila			20400.00	Edit	Delete
Manuel Lim	14, Rizal Ave Ext, Caloocan, Metro Manila			1020.00	Edit	Delete
Margie Tan	C.M. Recto Avenue corner Nicanor Reyes Street, Manila City, Metro Manila			2040.00	Edit	Delete
Matimco	840 Banawe St, Quezon City, Metro Manila				Edit	Delete
Metro lamp	Alvarez St, Santa Cruz, Manila, Metro Manila				Edit	Delete

Croma and Sons

05/12/2016

User’s Manual

Sales Module

PROCUREMENT MANUAL

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3.0 SALES REFERENCE

3.2 Sales Report

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

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.

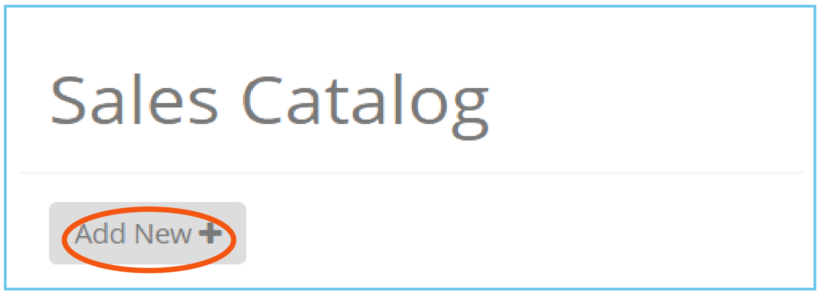
Invoice #	Invoice Date	Customer	Total Amount	Total Discount
1	2016-12-07 14:05:52	Manuel Lim	320.00	0.0000

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

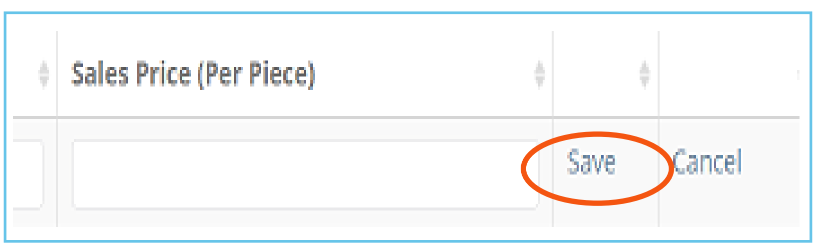
3.0 SALES REFERENCE

3.1 Sales Catalog

Clicking “Sales Catalog” on the sidebar will redirect the user to the Sales Catalog page. The Sales Catalog contains all of the recorded materials by the company. It contains all the necessary information needed by the user for sales purposes. The user can add new materials, edit, and delete.

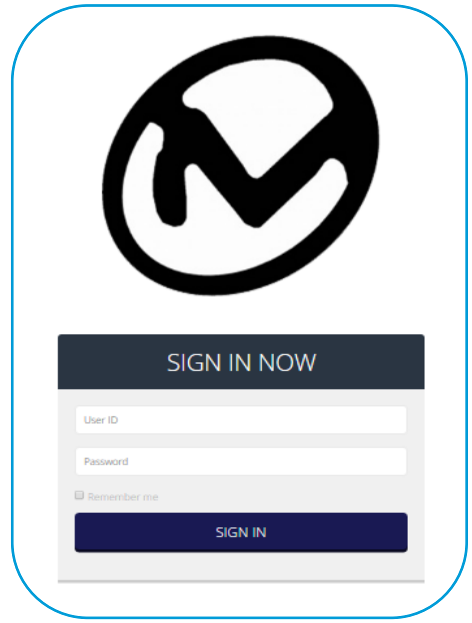


To add a new material, simply click the button below the header. Clicking the button with the label “Add New +” will create a new row in the sales list’s table. This means that the user can now add a new material in the system. All necessary information have assigned input fields, the user inputs the 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 Sales 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.

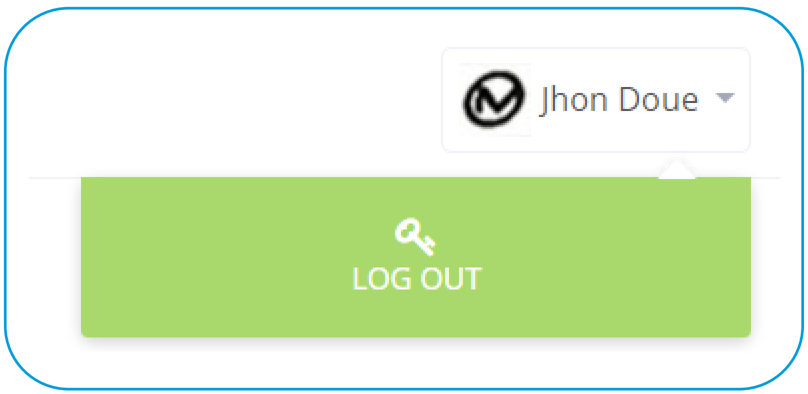
Username is not associated to any account — The username does not match any existing records in the database.

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 Sales 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.



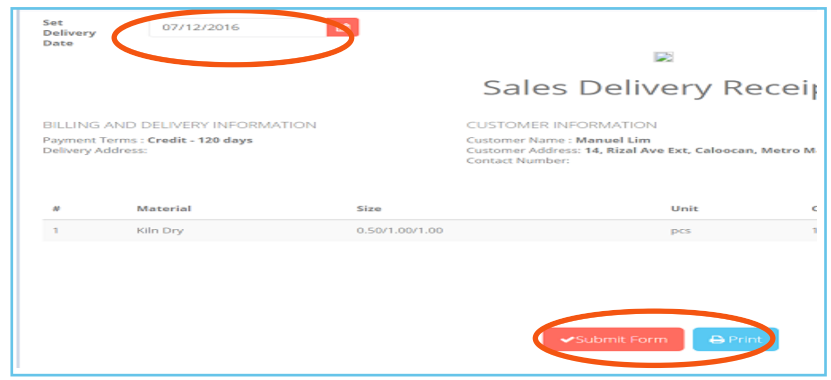
1.3 Basic Components

The Sales 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 SALES FORM

2.2.2 Sales Delivery Receipt (Cont.)

At the bottom right of the page are monetary information. The user can only submit the delivery receipt after setting the delivery date for the sales delivery receipt . The user must click the Submit Form button below the table to submit the delivery receipt. Once done, the user must click the Submit Form. Clicking the print button will prompt the system to print the Sales Delivery Receipt displayed in the screen.



2.3 Sales Invoice

The sales invoice is almost the same as the Sales Delivery Receipt. All information from the Sales DR are also present in the Invoice. The only difference is that the user is prompted to input rejects in the invoice. Once the user is finished on evaluating the Invoice, the user must click the button below the table with the label "Submit Rejects". The user can also print the Sales Invoice by clicking the print button beside the Submit Rejects button.

2.0 SALES FORM

2.2.1 Pending Delivery Receipt

Clicking “Create Delivery Receipt” will redirect the user to the initial step for creating a delivery receipt. In order to create the actual Delivery Receipt, the user must first select the delivery receipt they want to receive. To do this, the user clicks the button on the rightmost side of the table that has a label of “Create DR”.

Date Created	Customer	
2016-12-07 12:32:57	Manuel Lim	Create DR
2016-12-07 13:35:32	Margie Tan	Create DR

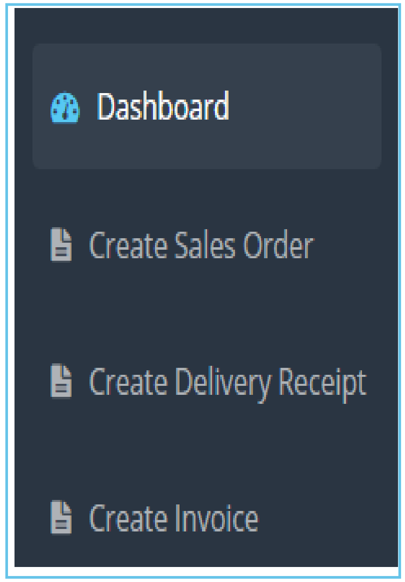
2.2.2 Sales Delivery Receipt

After choosing which Delivery Receipt to submit, 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. Three main information categories are displayed in the page these are, Billing and Delivery Information, Customer Information, and Delivery Receipt Information.

BILLING AND DELIVERY INFORMATION	CUSTOMER INFORMATION	DELIVERY RECEIPT INFORMATION
Payment Terms : **Credit - 120 days**	Customer Name : **Manuel Lim**	Delivery Receipt Number : **1**
Delivery Address:	Customer Address: **14, Rizal Ave Ext, Caloocan, Metro Manila**	Sales Order Number : **2**
	Contact Number:	Order Date : **2016-12-07 12:32:57**
		Prepared By : **Audrey Cobankiat**

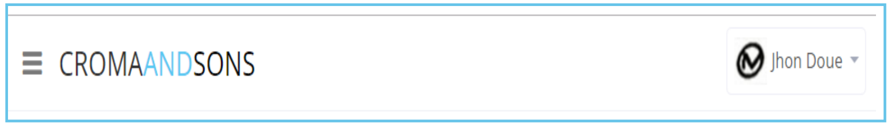
1.0 GETTING STARTED

1.3.1 Sidebar



The Sales sidebar serves as the navigation for the Sales 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

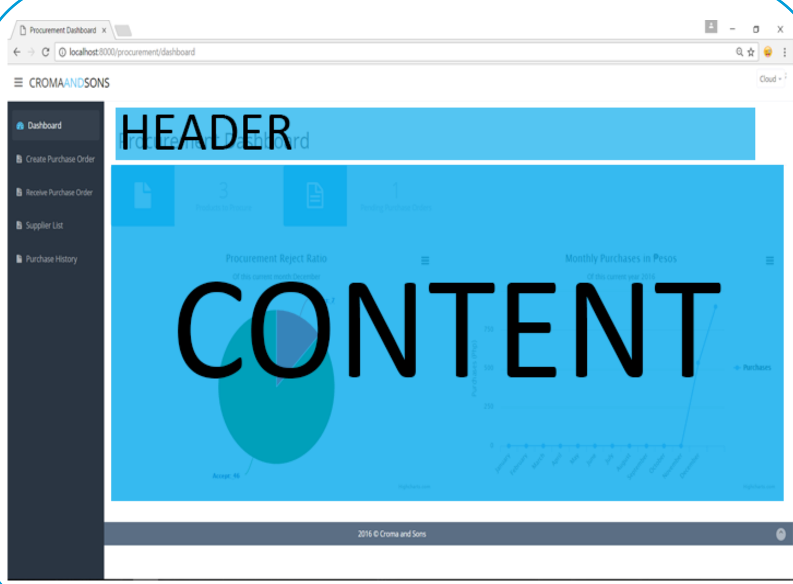


The left most button in the header will hide the entire sidebar when clicked. This is used when the user wants to remove the sidebar to conserve space for the body. The Croma and Sons label also serves as a home button and will immediately redirect you to the dashboard. Lastly, the right-most button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

1.0 GETTING STARTED

1.3.3 Body

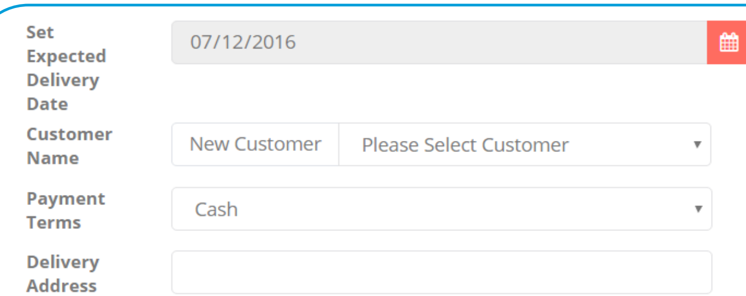
The body is the most important part of the system. The body consists of the content of the chosen page in the sidebar. This is where content is where the text fields, tables, and charts are located. The header consists of the title of the page or the title related to it.



2.0 SALES FORMS

2.1 Sales Order

Necessary purchase order details are displayed with their corresponding input fields. These details must be accomplished first before submitting the sales order.

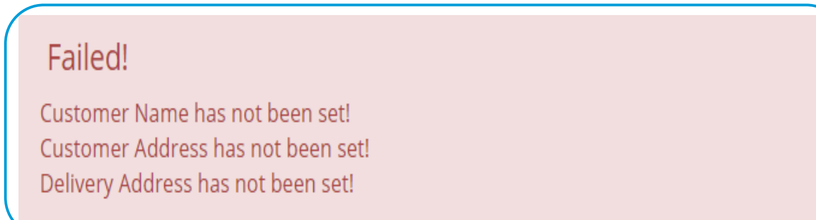


Possible Errors:

Failed! Customer Name has not been set—Missing input for customer name

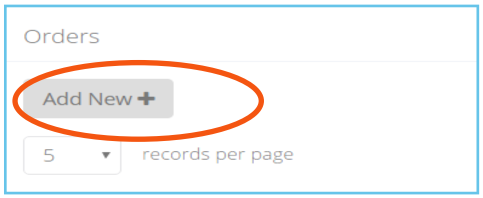
Failed! Customer Address has not been set—Missing input for customer address

Failed! Delivery Address has not been set—Missing input for delivery address. A red box will appear on top of the body to show that there are errors in the user’s input. Along with the red box are the error messages.



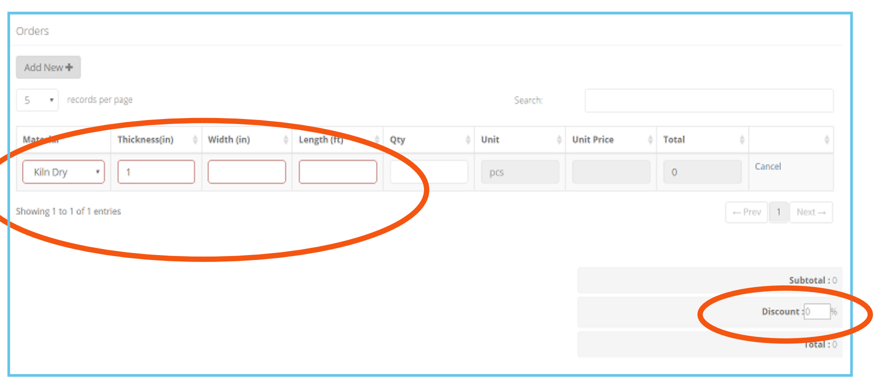
2.0 SALES FORM

2.1 Sales Order (Cont.)



Below the sales order details are the orders table. To add a new material, simply click the button below the header. Clicking the button with the label “Add New +” will create a new row in the orders list’s table. This means that the user can now add a new material in the order. All necessary information have assigned input fields, the user inputs the data on the designated input fields. Once done, the user must click the Submit Form button to create the sales order. Clicking the print button will prompt the system to print the Sales Order Form displayed in the screen.

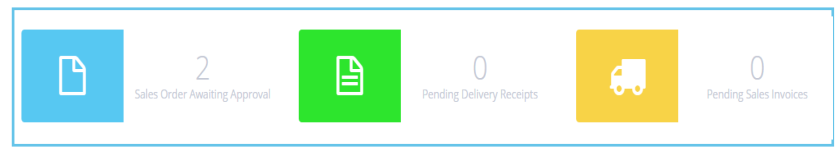
The input fields will turn red if the user tries to input data that is not recognized by the system. Also, the system will not allow the user to input invalid data leaving the input field blank. At the bottom right of the Ordered Items table are monetary information. The user can input the discount in the discount field and it would be automatically reflected on the grand total just right below it.



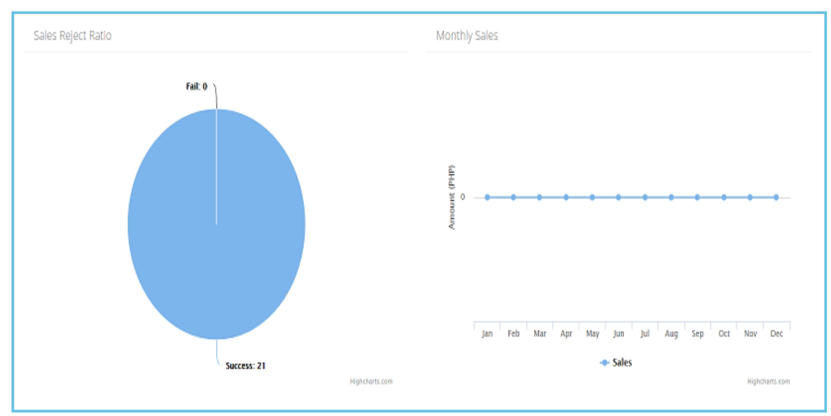
1.0 GETTING STARTED

1.4 Dashboard Layout

The Sales Dashboard is the homepage of the Sales User and the first page the user will see. Below the header of the body are the notifications. Sales Dashboard has three notifications, Sales Order Awaiting Approval, Pending Delivery Receipts, and Pending Sales Invoice. Pending Delivery Receipts notification when clicked will redirect the user to “Create Delivery Receipt” page. Pending Sales Invoice when clicked will redirect the user to “Create Invoice” page.



Above the three notifications are the charts for Sales Dashboard. The pie chart labeled “Sales Reject Ratio” displays the fail vs success of sold materials for the current month. The line chart labeled “Monthly Sales” displays the trend of sales for the current month.



2.0 SALES FORMS

2.1 Sales Order

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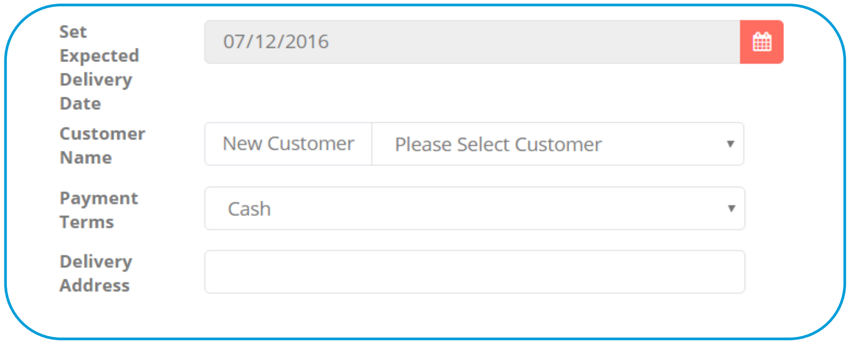
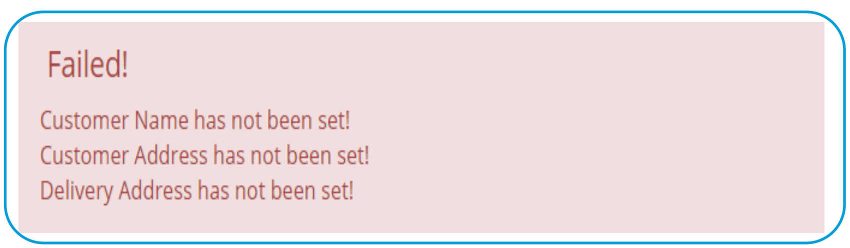


Possible Errors:

Failed! Customer Name has not been set—Missing input for customer name

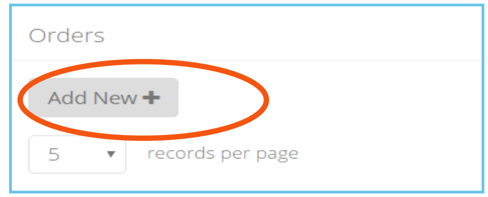
Failed! Customer Address has not been set—Missing input for customer address

Failed! Delivery Address has not been set—Missing input for delivery address. A red box will appear on top of the body to show that there are errors in the user's input. Along with the red box are the error messages.



2.0 SALES FORM

2.1 Sales Order (Cont.)



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