**User Manual: Managing Batches**

This guide provides a comprehensive overview of how to create, monitor, and manage poultry batches within the Poultrix application. A "batch" represents a specific group of birds being raised in a shed, tracked from a start date.

**1. Creating a New Batch**

To begin tracking a new flock, you must first create a batch. This process registers the flock in the system and prepares it for daily data entry.

**Steps:**

1. Navigate to the **Add New Batch** screen.
2. The "Add New Batch" form will appear. Fill in the following details:
   * **Batch Start Date:** The date the batch officially begins.
   * **Batch Number:** A unique number for the batch. The system will suggest the next available number, but you can override it if needed.
   * **Shed Number:** The shed where the batch is housed.
   * **Opening:** The initial number of birds in the batch.
   * **Week & Day:** The starting age of the birds (e.g., Week 1, Day 1).
3. After filling in all required fields, click the **"Add Batch"** button to save. You will be redirected to the Production screen.

**2. Daily Production Monitoring**

The **Production** screen is your central hub for monitoring the daily status of all active batches.

* **Viewing Batches:** Select a date to view the performance of all batches active on that day. Each batch appears on a "card" showing key information at a glance.
* **Filtering:** You can filter the view by shed number to quickly find a specific batch.

**3. Recording Daily Batch Data**

Consistent data entry is crucial for accurate tracking and reporting. You should record data for each batch every day.

**Steps:**

1. From the **Production** screen, find the batch you wish to update for the selected date.
2. Click the **"Record Data"** button on the batch card.
3. On the "Update Data" screen, you can record the following information:
   * **Birds:**
     + Mortality: Number of birds that died.
     + Culls: Number of birds removed from the flock.
   * **Eggs (for Layer batches only):**
     + Table: Number of standard-sized eggs.
     + Jumbo: Number of jumbo-sized eggs.
     + CR: Number of cracked or damaged eggs.
   * **Feed Usage:**
     + Select a pre-defined **Feed Composition** from the dropdown list.
     + Specify the number of **"Times"** this composition was fed to the batch that day.
     + Click **"Confirm"** to log the feed usage. The system tracks the inventory of feed components automatically.
   * **Notes:** Add any relevant observations for the day.
4. Click **"Save Changes"** to record the day's data.

**4. Analyzing Batch Performance and Reports**

The application provides powerful tools for analyzing the performance of your batches over time.

**To view a detailed report for a specific batch:**

1. From the **Production** screen, click the **"Overview"** button on the desired batch card.
2. This will take you to the **Batch Details** page, which includes:
   * **Summary Cards:** An overview of Total Birds, Total Feed Consumed (in kg), and Total Eggs produced for the selected date.
   * **Performance Graphs:** Visual charts illustrating key metrics like Hen-Day Percentage (HD%).
   * **Report Generation:**
     + **Daily Report:** Select a start and end date to view a detailed performance report for that period.
     + **Weekly Report:** Enter a week number (e.g., 18) to generate a summary report for that specific week of the batch's life.
     + Click **"View Data"** to generate and view the selected report.

**5. Batch Configuration and Lifecycle Management**

The **Configurations** screen allows you to manage the master records for all batches in the system.

1. Navigate to **Configurations** from the main menu.
2. Expand the **"Batch Configuration"** section.
3. Here, you will see all existing batches, categorized by type (e.g., Layer, Grower, Chick). For each batch, you have three options:
   * **View:** See the basic, non-editable details of the batch.
   * **Edit:** Modify the core properties of the batch that were set during creation (e.g., start date, shed number).
   * **Close:** Officially close out a batch when it has been sold or moved. This removes it from the active production screen but preserves its historical data for reporting.

**User Manual: Core Business Operations**

This section details the standard workflow for managing inventory, business partners, purchases, and sales within the Poultrix application.

**2. Managing Inventory Items**

The foundation of your business operations is a well-maintained inventory. This includes everything from feed and medicine to packaging materials.

**Key Concepts:**

* **Inventory Items:** These are the raw materials, supplies, and products your farm uses or sells. Each item is tracked for quantity, value, and usage.
* **Stock Levels:** The system automatically updates stock levels when you purchase items (stock in) or use them in production/sell them (stock out).

**Workflow:**

1. **Creating an Inventory Item:**
   * Navigate to the **Inventory** section from the main menu.
   * Click **"Create New Item"**.
   * Fill in the item details, such as Item Name, Category (e.g., Feed, Medicine, Packaging), Unit of Measure (e.g., kg, ltr, pcs), and initial Opening Stock quantity and Value.
   * Save the item. It will now be available for purchasing and use.
2. **Viewing and Auditing Inventory:**
   * The main **Inventory** screen shows a list of all your items with their current stock levels.
   * You can click on any item to view its **Details** page, which includes a complete **Audit Trail**. This trail shows every stock movement (in or out) for that item, providing full traceability.

**3. Managing Business Partners**

Business Partners are the customers you sell to and the vendors you purchase from.

**Workflow:**

1. **Creating a Business Partner:**
   * Navigate to the **People** section from the main menu.
   * Click **"Add Business Partner"**.
   * Enter the partner's information, including their Name, Contact Details, and Type (either **Customer** or **Vendor**).
   * Save the partner. They can now be selected in sales or purchase orders.
2. **Viewing Partner Details:**
   * The **People** screen lists all your customers and vendors.
   * Clicking on a partner shows their **Details** page, which includes their contact information and a complete history of all sales or purchase orders associated with them.

**4. The Purchase Workflow**

This workflow covers how to procure goods from your vendors and update your inventory and financial records accordingly.

**Workflow:**

1. **Create a Purchase Order:**
   * Navigate to the **Purchases** section and click **"Create Purchase Order"**.
   * Select the **Vendor** you are purchasing from.
   * Add **Inventory Items** to the order, specifying the Quantity and Price for each.
   * This is the crucial step that increases the stock quantity of the received items in your inventory.
2. **Record a Payment:**
   * Once you pay the vendor, find the Purchase Order and click **"Add Payment"**.
   * Enter the payment amount and date.
   * The order status will update to Paid or Partially Paid, and the transaction will be recorded in your financial ledgers.

**5. The Sales Workflow**

This workflow covers how to sell goods to your customers, manage egg inventory, and record payments.

**Workflow:**

1. **Create a Sales Order:**
   * Navigate to the **Sales** section and click **"Create Sales Order"**.
   * Select the **Customer** who is buying from you.
   * Add items to the order. You can sell both general **Inventory Items** (like culled birds or manure) and **Eggs**.
2. **Selling Eggs from the Egg Room:**
   * The **Egg Room** is a special part of your inventory that tracks eggs by type (e.g., Table, Jumbo, Cracked).
   * When adding eggs to a Sales Order, you will select the Egg Type and Quantity.
   * Completing the Sales Order automatically deducts the sold quantity from the corresponding stock in your **Egg Room**, ensuring your egg inventory is always up-to-date.
3. **Record a Payment:**
   * When the customer pays you, open the Sales Order and click **"Add Payment"**.
   * Enter the amount received.
   * The order status will update accordingly, and the revenue will be reflected in your financial reports.

**User Manual: Advanced Features & Financials**

This section covers specialized tools for feed management, bulk data uploads, financial tracking, and system-wide configurations.

**5. Feed Mill & Composition Management**

This module allows you to define feed recipes (compositions) from raw ingredients and track their consumption.

**Workflow:**

1. **View Feed Mill Stock:**
   * Navigate to the **Feed Mill** section. This screen shows the current inventory levels of all items categorized as "Feed".
2. **Create/Edit a Feed Composition:**
   * A composition is a recipe for a specific type of feed mix.
   * From the Feed Mill screen, click **"Create"** to open the Composition Form.
   * Give the composition a unique **name** (e.g., "Layer Phase 1").
   * Use the search bar to find and add raw ingredients (Inventory Items) to the composition.
   * For each ingredient, specify the **weight** (in kg) to be included in one "mix" of the composition.
   * Click **"Save Composition"**. You can also select an existing composition and click **"Edit"** to modify it.
3. **Track Feed Usage:**
   * On the main Production screen, when you **"Record Data"** for a batch, you can select a composition and the number of times it was used. This automatically deducts the correct amount of each ingredient from your inventory.
   * To see a full report, navigate to the Feed Mill, select a composition, and click **"View Usage History"**. This screen provides a detailed log of every time that feed mix was used, for which shed, and on what date. You can also **"Revert"** a usage entry from this screen to correct mistakes.

**6. Egg Room Stock Report**

The Egg Room provides a dedicated interface for managing the daily flow of eggs from production to sales or other dispositions.

**Workflow:**

1. **Daily Entry:**
   * Navigate to the **Egg Room** from the main menu.
   * Select the **Report Date** you are recording data for.
   * The form is split into sections: **Table Stock**, **Jumbo**, and **Grade C**.
   * The Opening balance for each type is automatically filled from the previous day's closing balance.
   * Received quantities are automatically populated from the daily data recorded in the Production sheds.
   * Enter values for fields like Damage, Waste, or Labour (for Grade C eggs).
   * The Closing balance is calculated automatically.
   * Click **"Save"** to finalize the day's report.
2. **Historical Reporting:**
   * On the same screen, use the **"View Report"** section to select a Start Date and End Date to view a complete history of egg movements over that period.
   * You can use the **"Share as Image"** button to export either the daily entry form or the historical report as a PNG file.

**7. Bulk Data Upload for Batches**

To save time, you can upload daily production data for multiple batches at once using a spreadsheet.

**Workflow:**

1. Navigate to the **"Upload Batch"** section.
2. Click **"Select Excel File"** and choose your prepared spreadsheet (.xlsx or .xls).
3. The system expects the file to have specific columns that correspond to the daily entry fields (e.g., Batch Number, Date, Mortality, Culls, Egg Counts, etc.).
4. Click **"Upload"**. The system will process the file and update the daily records for all batches included in it.

**8. Financial Ledgers**

Ledgers provide a detailed, accounting-style view of all transactions recorded in the system. You can find them under a "Ledgers" or "Financials" menu.

* **General Ledger:** The master financial record. Select a date range to see all debits, credits, and the running balance of your entire operation.
* **Purchase Ledger:** Filters transactions for a single vendor. Select a Vendor to see a history of all purchase orders, payments made, and outstanding balances.
* **Sales Ledger:** Filters transactions for a single customer. Select a Customer to see a history of all sales invoices, payments received, and outstanding balances.
* **Inventory Ledger:** Tracks the movement and value of a single inventory item. Select an Item and a date range to see a full audit trail of stock received, stock used/sold, and the quantity on hand over time.

**9. System Configurations**

The **Configurations** page is a central area for administrators to set up the core operational parameters of the application.

Key settings include:

* **Thresholds:** Set low-stock warning thresholds for feed and medicine to receive alerts.
* **Egg Room Initial Setup:** A critical one-time setup. Here you must define the **Egg Room Start Date** (the first day the system will begin tracking egg inventory) and the **Initial Opening** counts for each egg type on that date.
* **Financial Configuration:** Set the initial Opening Balance for the General Ledger.
* **Batch Configuration:** View, edit, or close existing batch master records.
* **Tenant Configuration:** Manage details about your farm or business entity.

**2. Tracking Expenses & Generating Reports**

**A. Managing Operational Expenses**

Operational Expenses are the day-to-day costs of running your farm that are not directly part of a purchase order, such as salaries, utilities, or rent.

**Workflow:**

1. Navigate to the **Operational Expenses** section.
2. Click **"Add Expense"** or a similar button.
3. Fill out the form with the Expense Type (or description), Amount, and the Date the expense was incurred.
4. Save the entry. These expenses will be automatically deducted in your Profit and Loss report.

**B. Financial Reports**

The **Financial Reports** section provides a high-level overview of your farm's financial health. This section consolidates all the data from your sales, purchases, and expenses into professional financial statements.

**Available Reports:**

* **Profit and Loss (P&L) Statement:**
  + Select a Start Date and End Date to see your performance over a period.
  + This report shows your total Revenue minus the Cost of Goods Sold (COGS) and Operating Expenses to calculate your Net Income (profit or loss).
  + You can click a "View Details" link next to Operating Expenses to see a breakdown of all expenses in that period.
* **Balance Sheet:**
  + Select an As of Date to see a snapshot of your financial position on that day.
  + This report lists your company's Assets (e.g., cash, inventory value, money owed by customers) and Liabilities (e.g., money you owe to vendors) to show your total Equity.