

Operations Entry Demo Instructions

Use this guide to try the entry workflow with fictional information. The demo does not connect to a live spreadsheet, company account, or production system.

Important: demo changes are saved only in the current browser. They do not affect real inventory, customers, rentals, movements, bills, or company records.

Know the screen

Screen area	What it does
Working tab	Chooses Inventory, Rentals, Movements, or Carrier Bills.
Find a record	Searches only the selected working tab.
Matching records	Shows results after you search. Select a result to open it.
Add new	Opens a separate blank form for a new fictional record.
Reset fictional data	Restores every demo tab to its original sample records.

Choose only the task you need. Tasks A through E are separate instructions; you do not complete every task in order.

TASK A

Find and edit an existing demo record

1

Choose the working tab

Select the tab that should contain the record: **Inventory**, **Rentals**, **Movements**, or **Carrier Bills**. Each tab has its own fields and fictional sample records.

2

Enter a search

In **Find a record**, enter a name, unit ID, invoice number, status, or another known value. Select **Search**. A blank search intentionally shows no records.

3

Choose from Matching records

Results appear only after you search. Select the correct fictional result under **Matching records**. If nothing appears, check the working tab or try a shorter search.

4

Edit the opened form

The record opens on the right. Change the fields needed for the demonstration. Dates and amounts use their prepared field types; Notes accepts longer information.

5

Save the demo record

Select **Save demo record**. The change is stored in this browser only. Search again if you want to reopen and confirm it.

TASK B

Add one new fictional record

1

Choose where the record belongs

Use **Working tab** to select Inventory, Rentals, Movements, or Carrier Bills. The selected tab controls which blank fields appear.

2

Search before adding

Search the strongest fictional identifier first, such as the unit ID or invoice number. This demonstrates the same duplicate-check habit used in a working system.

3

Select Add new

Select **Add new**. A blank form opens on the right. This is separate from selecting a result under Matching records.

4

Enter the sample information

Complete the fields you want to demonstrate. Use clearly fictional names, addresses, unit IDs, and invoices. Do not enter real customer or company information.

5

Save and confirm

Select **Save demo record**. Search for it once to confirm it appears in the selected working tab.

TASK C

Archive a fictional demo record

1

Find and open the record

Choose the correct working tab, search for the fictional record, and select it under Matching records.

2

Select Archive demo record

Review the open record, then select **Archive demo record**. This button appears only when editing an existing record.

3

Confirm the archive

Confirm the browser message. The fictional record is removed from that demo tab in this browser.

4

Understand the demo limitation

This standalone demo does not have a separate Archive tab. Use **Reset fictional data** if you want to restore the original sample record.

Cancel closes the form without saving. If you changed a field, the demo asks whether you want to discard the unsaved changes.

TASK D Switch between the demo tabs

1 Finish the open form

Save or cancel the current form before switching tabs. If you have unsaved changes, the demo asks whether you want to discard them.

2 Select another working tab

Choose **Inventory**, **Rentals**, **Movements**, or **Carrier Bills**. The search box, results, and form belong to the selected tab.

3 Search within the new tab

Enter a new search and select Search. Results from the previous tab do not carry over.

TASK E Reset the demonstration

1 Select Reset fictional data

Use the button at the top of the demo when you want to erase all browser-only edits, additions, and archives.

2 Confirm the reset

Confirm the browser message. Every tab returns to the fictional starting records included with the demo.

3 Know what reset affects

Reset affects only this demo in this browser. It cannot change a spreadsheet, another person's browser, or any live business system.

Quick rules for a safe demonstration

Do	Do not
Use fictional names, unit IDs, invoices, addresses, and amounts.	Enter real customer, employee, payment, or confidential business information.
Search before adding and save one demo record at a time.	Assume a demo change will appear in a spreadsheet or on another device.
Use Reset fictional data before handing the demo to another viewer.	Use the demo as an operational recordkeeping system.

The demo is intentionally isolated: no sign-in, credentials, Google connection, Microsoft connection, spreadsheet connection, or live company data is required.