A AssembleOS

Platform Guide & Tester Package

A complete, plain-language guide to the AssembleOS manufacturing operating system, plus a structured test pack for evaluating it end to end.

Part 1 User Flow Guide — how the platform works, step by step

Part 2 Tester Package — 30 test cases, result sheet & bug template

Live application: https://assembleos.vercel.app · Demo password: demo1234

AssembleOS · User Flow Guide

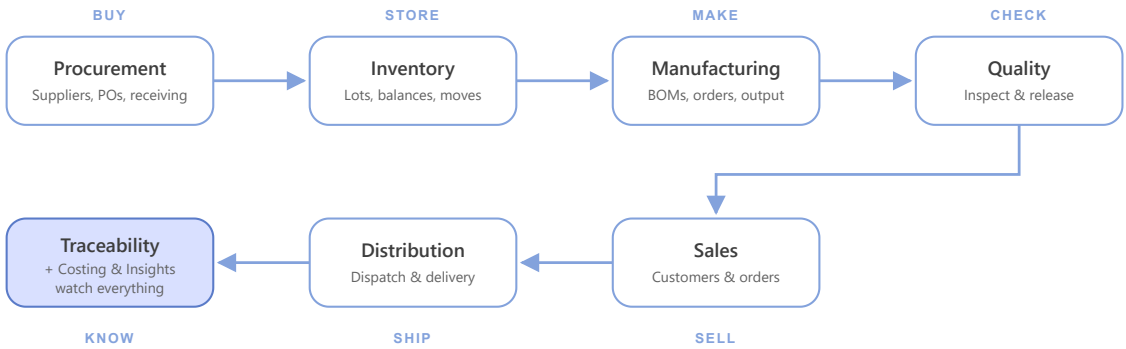
From purchase to production to market, step by step

A plain-language walkthrough of AssembleOS for first-time users. No prior knowledge of manufacturing software is required. Follow the journeys in order the first time; afterwards, jump to whichever section you need.

> **The one promise everything here serves:** know what you bought, where it is, what it became, who made it, what it cost, and who it was sold to.

1 The big picture

AssembleOS connects eight everyday activities into one chain. Each box below is a section of the app, and each arrow is data flowing automatically to the next step.



The AssembleOS value chain. Money and materials flow left to right on top, finished goods flow right to left below, and the Know layer sees it all.

Words you will meet (90-second glossary)

TERM	PLAIN MEANING
Item	Anything you stock: a raw material, packaging, or a finished product.
Purchase Order (PO)	"We promise to buy this from a supplier." Buying starts here.
Goods Received Note (GRN)	"The supplier's delivery arrived." Receiving a PO puts stock on the shelf.
Lot / Batch	A labelled portion of stock you can trace, e.g. `LOT-SHEA-2605`.
BOM (Bill of Materials)	The recipe: which materials, and how much of each, make one product.
Production Order	"Make this many of that product." The instruction to the factory.
Material Issue	Handing materials from the store to production. Stock goes down.
Quarantine / Release	Fresh output is held (quarantined) until Quality approves (releases) it for sale.
Sales Order (SO)	"A customer wants to buy this." Selling starts here.
Dispatch	Shipping the goods out. Stock goes down, a delivery note is created.

2 Getting in

1. Open the app and click **Log in** (or go straight to /login).
2. Use a demo account below with password `demo1234`, then click **Log in**.
3. You land on the **Dashboard**: the day's numbers at a glance. The dark menu on the left is how you reach every section in this guide.

LOG IN AS	EMAIL	WHAT THEY CAN DO
Admin	`ada@apexnaturals.com`	Everything. Best account for this guide.
Operator	`funke@apexnaturals.com`	Factory floor only: production and work orders.
Sales	`bisi@apexnaturals.com`	Customers, sales orders, dispatch.
Finance	`kemi@apexnaturals.com`	Costing, valuation, and reports (view-only elsewhere).

New company instead? Click **Create one** on the login page, fill in four boxes, and you become the admin of a brand-new empty workspace. The **Onboarding wizard** opens automatically: pick your industry template, currency, and costing method, press **Apply configuration**, and the system is tailored to you.

3 Journey 1 · Buy materials

Goal: order raw materials from a supplier and get them onto the shelf.

A. Raise a purchase order

1. Left menu: Procurement → Purchase Orders, then click **New order**.
2. Pick a **supplier** from the dropdown.
3. Add line items: choose an **item**, type a **quantity** and **unit price**. The totals calculate themselves.
4. Click **Create purchase order**. It appears in the list as `Pending Approval`.

B. Approve it

1. Open the PO from the list (click its number, e.g. `PO-2026-0004`).
2. Click **Approve**. Status becomes `Approved`. Only now can it be received.

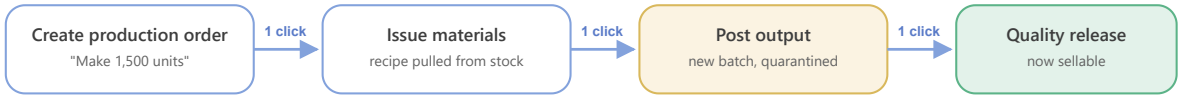
C. Receive the delivery

1. On the approved PO page click **Receive goods** (or Procurement → Goods Received → New).
2. Choose the **warehouse** the delivery goes into. This is deliberate: nothing is assumed.
3. For each line, confirm the **quantity received** and give the delivery a **lot number** (any label you will recognise, e.g. `LOT-SHEA-0611`). Add an expiry date if the material has one.
4. Click **Receive**. A GRN is created, stock increases instantly, and the PO flips to `Received` (or Partially Received if some is still coming).

See the proof: go to Inventory → Stock Balances. Your item's "on hand" went up. Inventory → Movements shows the receipt as a logged movement. Every action in AssembleOS leaves this kind of trace.

4 Journey 2 · Make a product

Goal: turn raw materials into sellable finished goods. This is the heart of the system.



Making something is three clicks once the order exists. Colours show the batch state: white = planning, amber = held for quality, green = ready to sell.

1. Left menu: Manufacturing → Production Orders. Open an order that is In Progress (e.g. `PRO-2026-0002`), or create one with **New order** by picking a product and a target quantity.
2. Read the **Material availability** panel. Green means the recipe (BOM) can be fully served from stock; amber lists exactly what is short.
3. Click **Issue materials**. The system takes every recipe ingredient out of stock for you, oldest-expiry lots first, and records which lots were used (that is the traceability magic later).
4. Click **Post output**. The finished quantity becomes a new **batch** (e.g. `LOT-FG-0001`) in the finished-goods warehouse, marked Quarantined, and the order completes.

Why can't I sell it yet? Fresh output is always held in quarantine until Quality approves it. That protects customers from untested product, and it is the next journey.

5 Journey 3 · Approve quality

1. Left menu: Quality → Quality Checks.
2. The top cards count pending, passed, and failed inspections. Below them, **Awaiting batch release** lists every quarantined batch.
3. Click **Release** next to your new batch. It instantly becomes Available sellable stock, and the release is logged with your name on it.

Shortcut: the same Release button also appears on Manufacturing → Finished Goods next to any quarantined batch.

6 Journey 4 · Sell and ship

A. Take the order

1. Left menu: Sales → Sales Orders, click **New order**.
2. Pick the **customer**, add the product and quantity, and note the live availability hint so you never promise stock you do not have.
3. Click **Create sales order**. Status: `Open`.

B. Ship it

1. Open the order and check the **Stock availability** panel is green.
2. Click **Dispatch**. In one stroke the system picks batches (oldest expiry first), reduces stock, creates a **dispatch order** and a **delivery note** (e.g. `DSP-2026-0002` + `DN-2026-0002`), and marks the order `Completed`.
3. See the shipment under Distribution → Dispatch, including exactly which batch went to that customer.

7 The Know layer: answers in seconds

WHERE	THE QUESTION IT ANSWERS
Traceability	"This batch in a customer's hands: what went into it, who made it, which supplier delivered the inputs?" Search any lot, order, or item and read the full timeline.
Finance → Costing & Valuation	"What is my stock worth, what does a unit really cost, and did production beat the standard cost?" Includes margins per product and a one-click valuation snapshot.
Insight → AI Insights	"What needs my attention today?" Prioritised, explainable alerts: stockouts, overdue orders, batches stuck in quarantine, thin margins.
Reports	Executive, inventory, production, quality, and sales dashboards.
Admin → Audit Logs	"Who did what, and when?" Every create, approve, issue, release, and dispatch, with names and timestamps.

8 Make it yours (Setup)

1. Setup → Onboarding: the three-step wizard. Company name, industry, **base currency** (every money figure across the app follows this), costing method, then an industry template that pre-loads sensible categories.
2. Setup → Company / Warehouses / Units: fine-tune details any time.
3. Inventory → Items and Sales → Customers: add your real materials, products, and customers with **New** buttons. Each form is a single page with plain-language fields.

AssembleOS · Tester Package v1.0

Structured test pack: 30 cases across 8 suites

Everything a tester needs: environment, accounts, ordered test cases with expected results, a result sheet, and a bug report template. No technical background needed. Budget roughly 60 to 90 minutes for a full pass.

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1 Environment & accounts

THING	VALUE
Application URL	https://assembleos.vercel.app
Health check	/api/health must show `{"ok":true,"db":"connected","seeded":true}` before you start. If not, stop and report.
Browsers	Latest Chrome or Edge (primary). One pass in Firefox or Safari is a bonus.
Password (all demo users)	`demo1234`

ROLE	EMAIL	USED IN SUITES
Admin	`ada@apexnaturals.com`	Most suites
Operator	`funke@apexnaturals.com`	B (permissions)
Sales Manager	`bisi@apexnaturals.com`	B (permissions)
Finance Manager	`kemi@apexnaturals.com`	B (permissions)

Shared demo data: all testers share one demo company. Numbers (stock, orders) may differ from the examples if someone tested before you; judge the *behaviour*, not the exact figures. Use your initials in anything you create (e.g. lot `LOT-TEST-JD-01`) so records are attributable.

2 How to run this pack



The loop for every test case. Anything not matching Expected is a Fail, even if it looks harmless.

- Run suites **in order**: later suites use things earlier suites create.
- One case = one row on the result sheet (section 5). Note the actual behaviour for any Fail.
- Screenshots strengthen every Fail report. Browser print-to-PDF of this page gives you a paper checklist.

3 Test suites

SUITE A Signing in & account safety

ID	STEPS	EXPECTED RESULT
A1	Open `/dashboard` directly while logged out.	You are redirected to the login page, never shown the dashboard.
A2	Log in as `ada@apexnaturals.com` with password `wrongpass`.	Red message "Invalid email or password." You stay on the login page.
A3	Repeat A2 six times in a row.	By the sixth attempt the message becomes "Too many attempts. Try again in 15 minutes."
A4	Log in as `ada@apexnaturals.com` / `demo1234`. (If A3 locked Ada, use another admin-capable account or wait.)	Dashboard loads, greeting "Welcome back, Ada", menu visible on the left.
A5	Login page → "Forgot password?" → enter `ada@apexnaturals.com` → Send.	Confirmation message appears, plus a demo reset link. The link opens a "Set a new password" page. **Do not actually change the password**; just confirm the page loads.
A6	Click the logout icon (top right).	Back to the login page; pressing the browser Back button does not reopen the dashboard.

SUITE B Permissions (who can do what)

ID	STEPS	EXPECTED RESULT
B1	Log in as Operator (`funke@`...). Look at the left menu, then try opening `/admin/users` by typing the address.	Menu shows only Dashboard + Manufacturing entries. The /admin attempt bounces you back to the dashboard.
B2	Still as Operator, open a production order and use its buttons (allowed work).	Production pages work normally for the Operator.
B3	Log in as Finance (`kemi@`...). Open any production order and click **Issue materials**.	A polite refusal appears: "You do not have permission to perform this action." Nothing changes in the data.

SUITE C Buying (PO → approve → receive)

Log in as Admin for suites C through H.

ID	STEPS	EXPECTED RESULT
C1	Procurement → Purchase Orders → New order. Pick any supplier, add 1 line (e.g. Shea Butter, qty 50, price 3500). Create.	New PO appears in the list as **Pending Approval** with a fresh number and correct line total.
C2	Open your PO and click **Approve**.	Status changes to **Approved**; a Receive option appears.
C3	Before receiving: note the item's "on hand" in Inventory → Stock Balances. Then receive the PO: choose warehouse **Raw Materials**, full quantity, lot `LOT-TEST-[initials]`.	Success; PO becomes **Received**; the GRN appears under Goods Received.
C4	Re-check Stock Balances and Movements for that item.	On hand increased by exactly your received quantity; Movements shows a receipt row with your lot number.

SUITE D Making (production)

ID	STEPS	EXPECTED RESULT
D1	Manufacturing → Production Orders → New order. Pick the finished product, target qty 100. Create, then open it.	Order page shows target 100, produced 0, an active BOM version, and a Material availability panel.
D2	Click **Issue materials**.	Confirmation like "Materials issued (MI-XXXX)". Raw-material stock decreases; Manufacturing → Material Issues lists the new issue with lots.
D3	Click **Post output**.	Message with a new batch (e.g. `LOT-FG-000X`); order flips to **Completed** with produced = 100.
D4	Open Manufacturing → Finished Goods.	The new batch is listed as **Quarantined** with quantity 100.

SUITE E Quality release

ID	STEPS	EXPECTED RESULT
E1	Quality → Quality Checks. Find your batch under "Awaiting batch release" and click **Release**.	The batch leaves the waiting list; on Finished Goods it now reads **Available**.
E2	Admin → Audit Logs.	A "Released batch ..." entry exists with your user name and the right time.

SUITE F Selling & shipping

ID	STEPS	EXPECTED RESULT
F1	Sales → Sales Orders → New order. Pick a customer, product qty 20, any price. Create, then open it.	Order is **Open**; totals are price x qty plus 7.5% tax; Stock availability panel is green for 20.
F2	Click **Dispatch**.	Order becomes **Completed**, dispatched qty 20. Distribution → Dispatch shows a new dispatch with a delivery note number and the exact batch shipped.
F3	Check Finished Goods / Stock Balances for the product.	Available stock dropped by exactly 20.

SUITE G Stock corrections

ID	STEPS	EXPECTED RESULT
G1	Inventory → Adjustments. Pick an item + warehouse, quantity `-2`, reason "Tester damage check". Record.	Adjustment appears in the right-hand list; the item's on hand drops by 2; a movement is logged.
G2	Inventory → Transfers. Move qty 1 of an item between two different warehouses.	Transfer listed as Completed; source warehouse -1, destination +1 on Stock Balances.
G3	On Transfers, try source = destination (same warehouse).	Friendly validation stops you ("Source and destination must differ"). Nothing is saved.

SUITE H The Know layer & a new company

ID	STEPS	EXPECTED RESULT
H1	Open Traceability and search the finished-goods lot you dispatched in F2.	A timeline appears connecting your batch back to material issues and forward to the dispatch.
H2	Open Finance → Costing & Valuation.	Inventory valuation table with a grand total; product cost & margin row; variance table. All money shows the company currency symbol consistently.
H3	Open Insight → AI Insights.	A summary sentence plus a prioritised list (severity colours). Each insight has a working action link.
H4	Log out → Create one (sign up): company "Test Co [initials]", your name, a fresh email, password 8+ chars.	You land on the Onboarding wizard as Company Admin of an EMPTY company (no Apex data anywhere).
H5	Complete onboarding: pick any template, set base currency **USD**, apply. Then open Finance → Costing and Sales → Orders.	Wizard confirms applied; all money across the app now shows **$**, not ₦.

4 Known behaviours (not bugs)

- Password reset shows the link on screen because no email service is connected in the demo.
- The Insights summary is labelled "Rules engine" unless an AI key is configured; both are valid.
- Changing base currency relabels money; it does not convert historical amounts between currencies.
- Demo data is shared; totals shift as other testers work. Behaviour, not exact numbers, is what you verify.

5 Result sheet

Print this page (or copy this table) and mark one row per case.

CASE	PASS / FAIL	NOTES (WHAT ACTUALLY HAPPENED, IF DIFFERENT)
A1		
A2		
A3		
A4		
A5		
A6		
B1		
B2		
B3		
C1		
C2		
C3		
C4		
D1		
D2		
D3		
D4		
E1		
E2		
F1		
F2		

F3
G1
G2
G3
H1
H2
H3
H4
H5

6 Bug report template

Copy this block for each Fail. Precise reports get fixed fastest.

```
Title:        [Case ID] Short description, e.g. "C3: stock did not increase after r
Account used: e.g. ada@apexnaturals.com
Date/time:    e.g. 2026-06-11 14:32 (your timezone)
Steps:        1. ...  2. ...  3. ...
Expected:     (copy from the test case)
Actual:       what you actually saw, including any exact error text
Screenshot:   attached / link
How often:    always / sometimes (tried N times)
```

AssembleOS Tester Package v1.0 · 30 cases, suites A through H · Companion document: User Flow Guide · Print to PDF via your browser's Print dialog