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SalesWorx Back-Office User Manual

Standard Edition

Unique Computer Systems LLC

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History

First Edition

SalesWorx Version: Standard 2.0

Functions: Android SFA System

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1. About the manual

This document serves as the user manual for SalesWorx Back Office web application. It provides information on usage of SalesWorx Web Client. This guide does not cover the installation of the system and usage of Mobile client. To know about the installation and using Mobile client, please refer to the technical manual and Mobile client user manual respectively.

1.1 Audiences

The intended audiences for this manual are the:

- Field Sales Representatives
- Sales Supervisors
- Business Development Managers
- Administrators

1.2 Structure of the manual

This document will introduce the various pages and options available in the web application in the first few chapters. This will help you get familiar with controls. Moving on, you will learn how to perform day-to-day operations using application.

1.3 Abbreviations

To make things easier, few abbreviations were used throughout the document. You can find the details in the table below:

Abbreviation	Description
ERP	Enterprise Resource Planning
FSR	Field Sales Representative
UOM	Unit of measurement
PDC	Post Dated Cheque
CDC	Current Dated Cheque
MSL	Must Stock List
MTD	Monthly Target Defined
FOC	Free of Charge

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2. Introduction

SalesWorx is a top quality mobile sales solution application developed by Unique Computer Systems that empowers your field sales team in conducting their field sales activities in a more informed and effective manner. It also provides the management with the required report and feedback - a complete tool optimized for field sales professionals.

2.1 About SalesWorx

SalesWorx is a high-end field sales automation application from Unique Computer System that offers a customizable planning, sales, delivery and collections management tool with full integration with your ERP for on-time sales and reporting.

SalesWorx addresses the needs of your mobile sales and distribution workforce by putting critical customer relationship management (CRM) and enterprise resource planning (ERP) data in the hands of mobile sales representatives and empower them to conduct effective field sales and distribution activity in an efficient and accurate manner.

SalesWorx is a client-server system and is available with a server application, called SalesWorx Back-Office and a mobile client, called SalesWorx Mobile. SalesWorx Mobile provides an interface for field sales and delivery personnel to record onsite data and synchronize this data with SalesWorx Back-Office via Wi-Fi or data package connection.

2.2 SalesWorx Back-Office

SalesWorx Back-Office includes the complete Back-Office Management Integration which is required for the solution. SalesWorx Back-Office is the server application of the SalesWorx system. It is an ASP.NET application which can be accessed using any of the popularly used browsers.

SalesWorx Back-Office offers complete control and management functionality for the SalesWorx system for application control, route planning, product management, order and return reviews, approvals, survey management, user management and reporting.

The SalesWorx Back-Office application is a browser based application and accessible via Internet Explorer 7.0 and above, Google Chrome 8.0 and above, Mozilla Firefox and Safari.

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3. Starting and logging in

Once SalesWorx Back-Office and at least one SalesWorx Mobile client has been installed the system can be used.

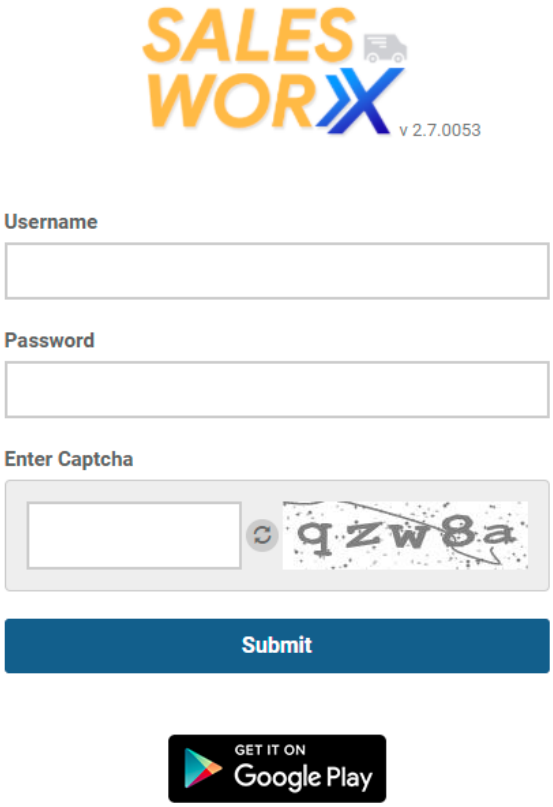
3.1 Access SalesWorx Back-Office

Launch your favorite web browser. It is recommended to use Google Chrome.

Enter ***http://<server name>/swx_ vs/html/login.aspx*** into the browser's address bar, where <**server name**> refers to the server location setup for the SalesWorx BackOffice site.

3.2 Logging in

Once the Login page is displayed, enter the assigned Username, Password, and Captcha. Click on Login button to login to back office.



Once the user has been successfully logged in, the application will verify the users access rights and display only those menu items and pages to which the user role has been granted access through the User Management module.

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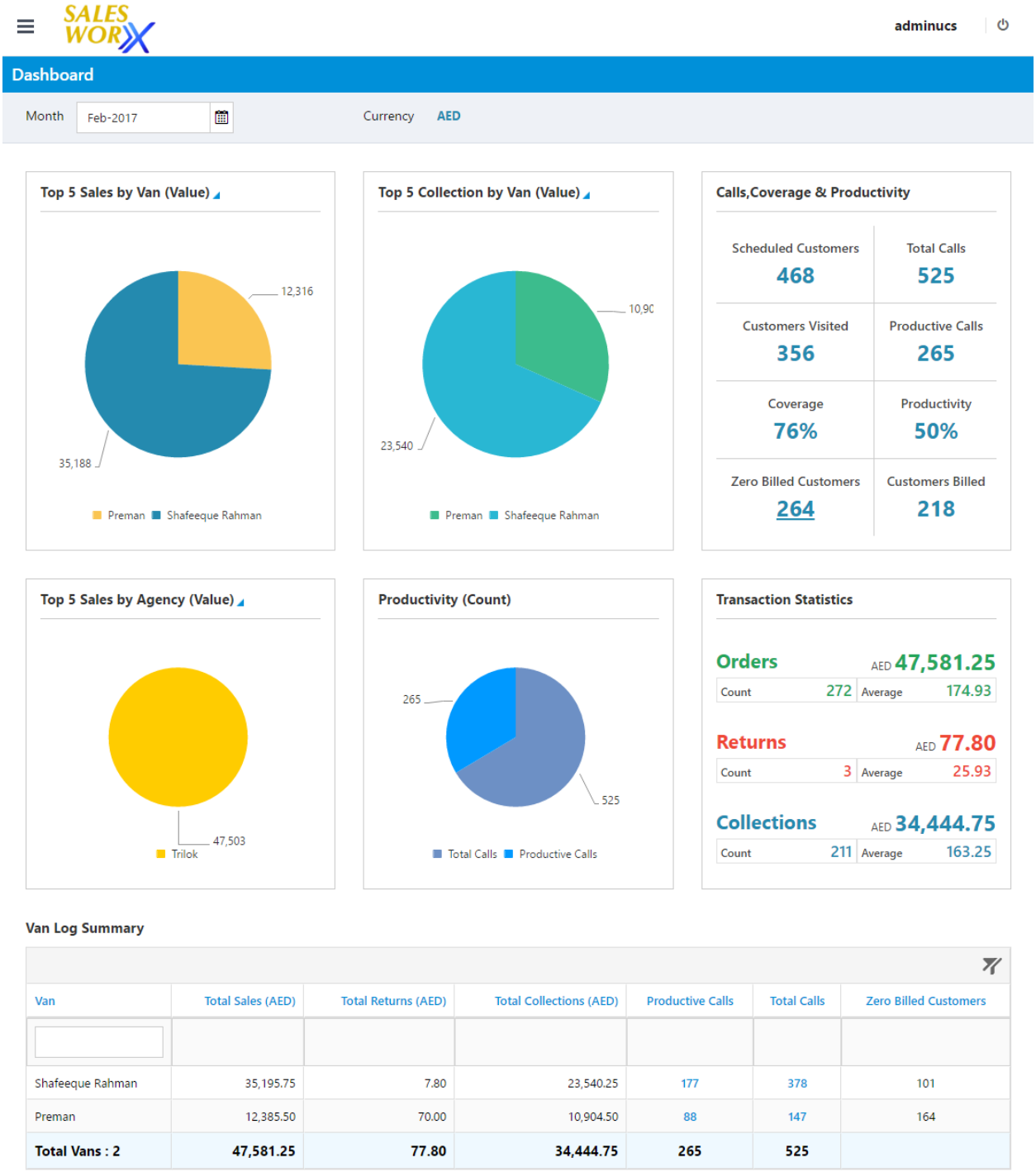
3.3 Dashboard

Upon successful login, you will be presented with the dashboard. The dashboard contains all the useful statistics and summary. The pie chart will help quickly grasp the information related to sales, collections, productivity etc. The dashboard will by default display the data for the current month. For better analysis, tabular data is also provided.



Van	Total Sales (AED)	Total Returns (AED)	Total Collections (AED)	Productive Calls	Total Calls	Zero Billed Customers
Shafeeque Rahman	35,195.75	7.80	23,540.25	177	378	101
Preman	12,385.50	70.00	10,904.50	88	147	164
Total Vans : 2	**47,581.25**	**77.80**	**34,444.75**	**265**	**525**	

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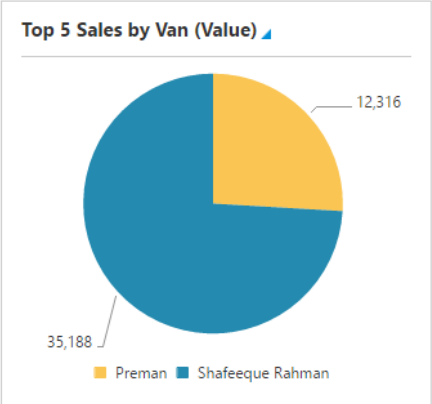
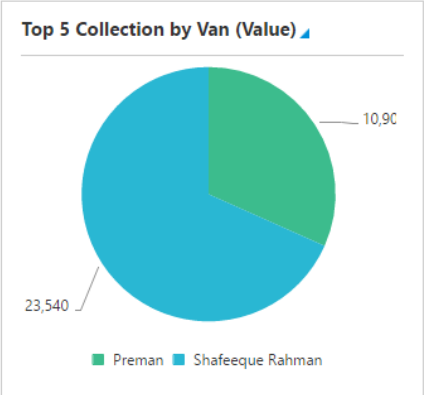
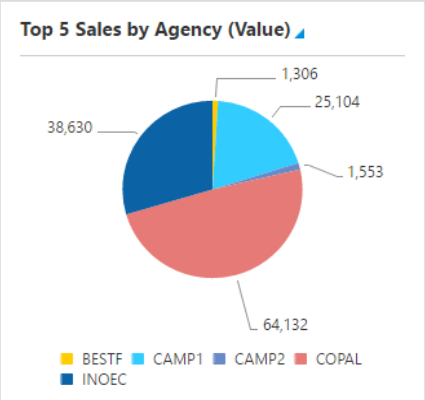
To view information for other months, choose a month from the month picker. The selected month's info will be displayed.



Top 5 sales by van displays a pie chart showing the five vans which had made most sales in the selected month. Clicking on the chart header will open up a detailed sales report. Hover over the chart to display more information. Click on the chart ledgers to enable or disable the ledger.



Top 5 collections by van displays a pie chart showing the five vans which have taken the most collections in the selected month. Clicking on the chart header will open up a detailed report. Hover over the chart to display more information. Click on the chart ledgers to enable or disable the ledger.



Top 5 sales by agency will display the agencies which has the most selling products. Clicking on the chart header will open up a detailed report.

Productivity chart displays the ratio of total calls versus productive calls.

Calls,Coverage & Productivity

Scheduled Customers **468**	Total Calls **525**
Customers Visited **356**	Productive Calls **265**
Coverage **76%**	Productivity **50%**
Zero Billed Customers **264**	Customers Billed **218**

Calls, Coverage & Productivity table displays the number of scheduled customers, total calls, customers visited, productive calls, zero billed customers, and customers billed. Scheduled customers are the customers for which a visit is/was planned. Total calls are the number of calls made in the month selected. Customers visited is the number of customers to which visits were made. Productive calls are the calls in which sales order was generated. Zero billed customers are the customers who have not made an order in the selected month.

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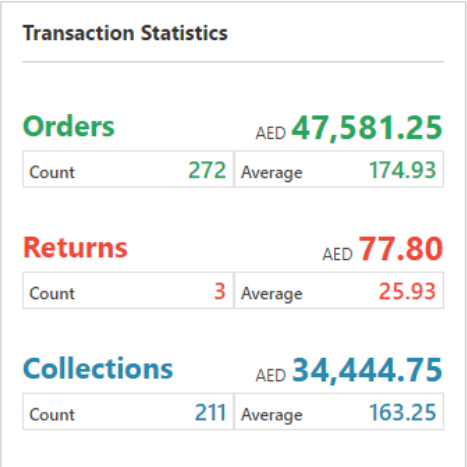
It also displays the coverage percentage and productivity percentage. Clicking on the count of zero billed customers will navigate you the zero billed customers report.

The Transaction statistics displays the overview of sales, returns and collections made.

Orders amount is the total amount of sales. Order count is the number of sales order generated. Average is the average amount of sales orders.

Returns amount is the total amount of credit notes generated. Count is the number of credit notes. Average is the average amount of generated credit notes.

Collections amount is the total collections taken. Count is the number of collection receipts. Average is the average amount of generated collection receipts.



Van Log Summary displays the van wise details of the total sales, returns, collections, productive calls, total calls, and zero billed customers.

Van Log Summary

Van	Total Sales (AED)	Total Returns (AED)	Total Collections (AED)	Productive Calls	Total Calls	Zero Billed Customers
Shafeeque Rahman	35,195.75	7.80	23,540.25	177	378	101
Preman	12,385.50	70.00	10,904.50	88	147	164
Total Vans : 2	**47,581.25**	**77.80**	**34,444.75**	**265**	**525**	

Clicking on the number of Productive Calls or Total Calls will navigate you to the customer visits report page.

You can use button to filter the results after entering the search text.

In the top pane, clicking on button in the top left corner will let you expand or collapse the left pane. All the menu items are available in the left pane.

Clicking on button in the top right corner will log you out of the SalesWorx Back-Office.

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4. Main settings

This module consists of System Settings, Organization Settings and Manage Background Reports.

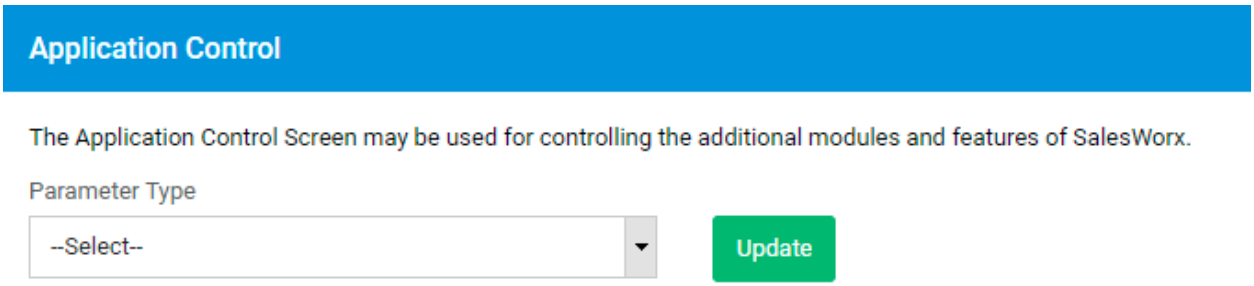
4.1 System settings

System settings generally contain the settings and flags used to manage the system. The options under system settings are Application control, Application codes, and Manage currency.

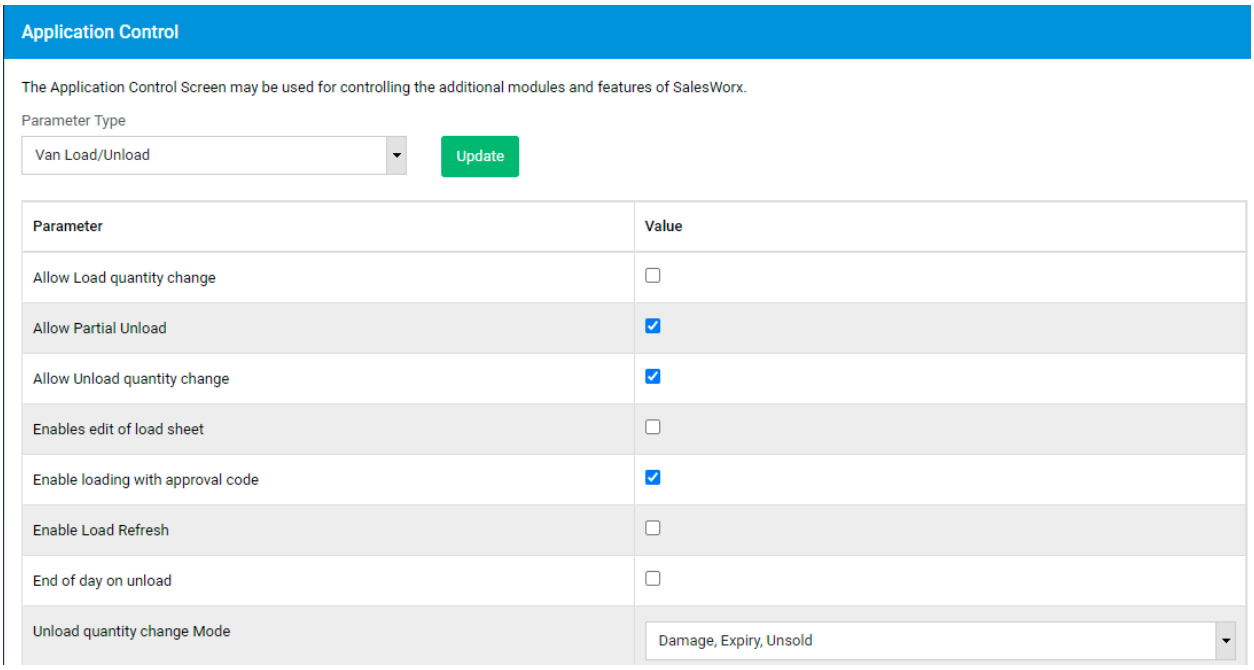
4.1.1 Application Control

Application Control screen is intended for Administrators and highly technical users. Using this screen, the behavior of the mobile application across multiple modules or functionality can be altered. This is to be used with caution.

After the screen is opened, select the parameter type.



The controls related to the selected parameter will be populated.



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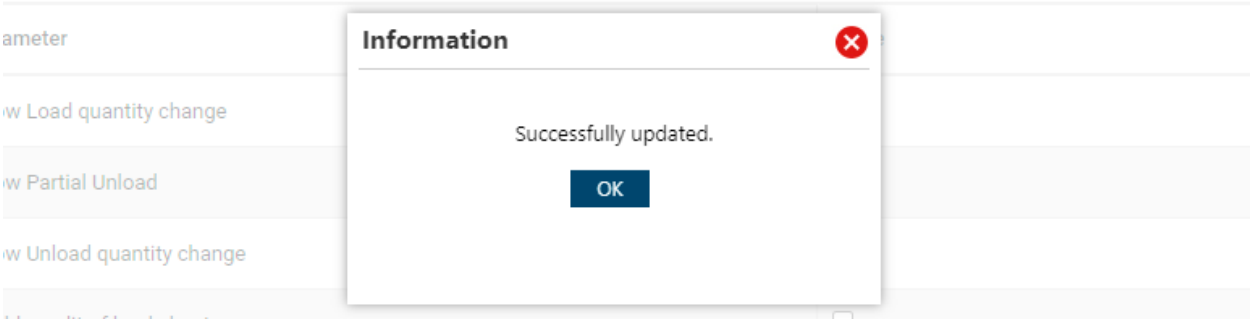
Make the necessary changes and click on Update button.

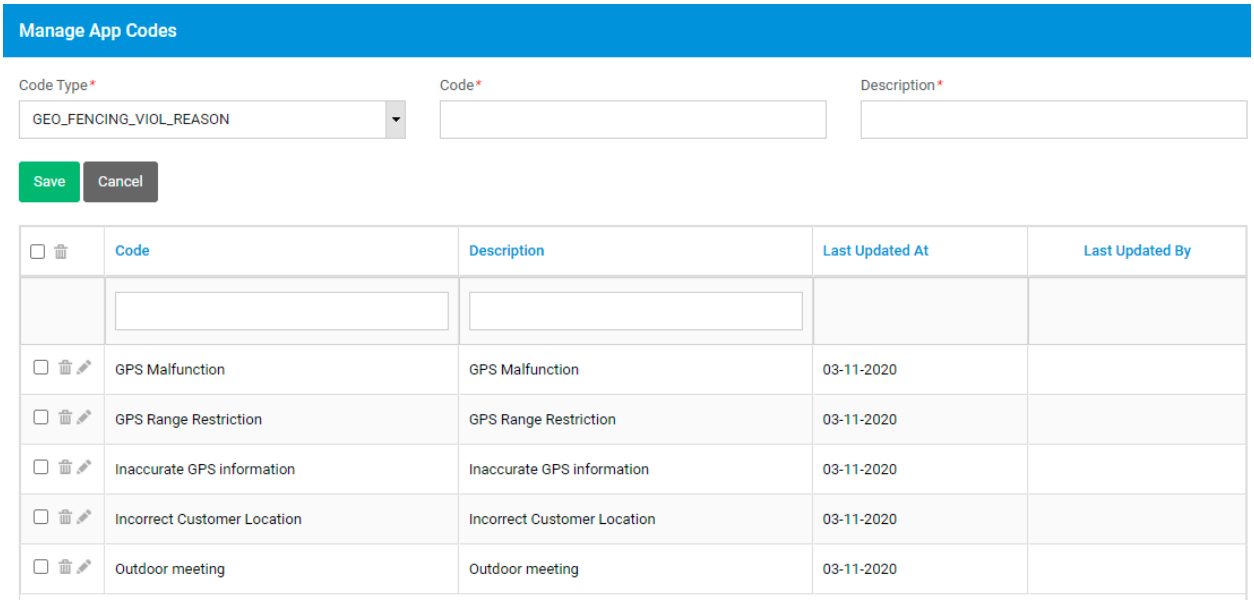


A confirmation message will be displayed. The updated controls will be reflected in mobile devices after a successful full sync.

4.1.2 Application codes

In the Application codes section, you can add, modify or delete codes such as Reason for discount during collections, Reason for skipping, Reason for geo fencing violation, etc.

To add a code, select Code Type, enter a Code and provide Description.



Click on Save to save the code.

You can click on Edit or Delete buttons against a code displayed in tabular form to delete or update the existing application codes.

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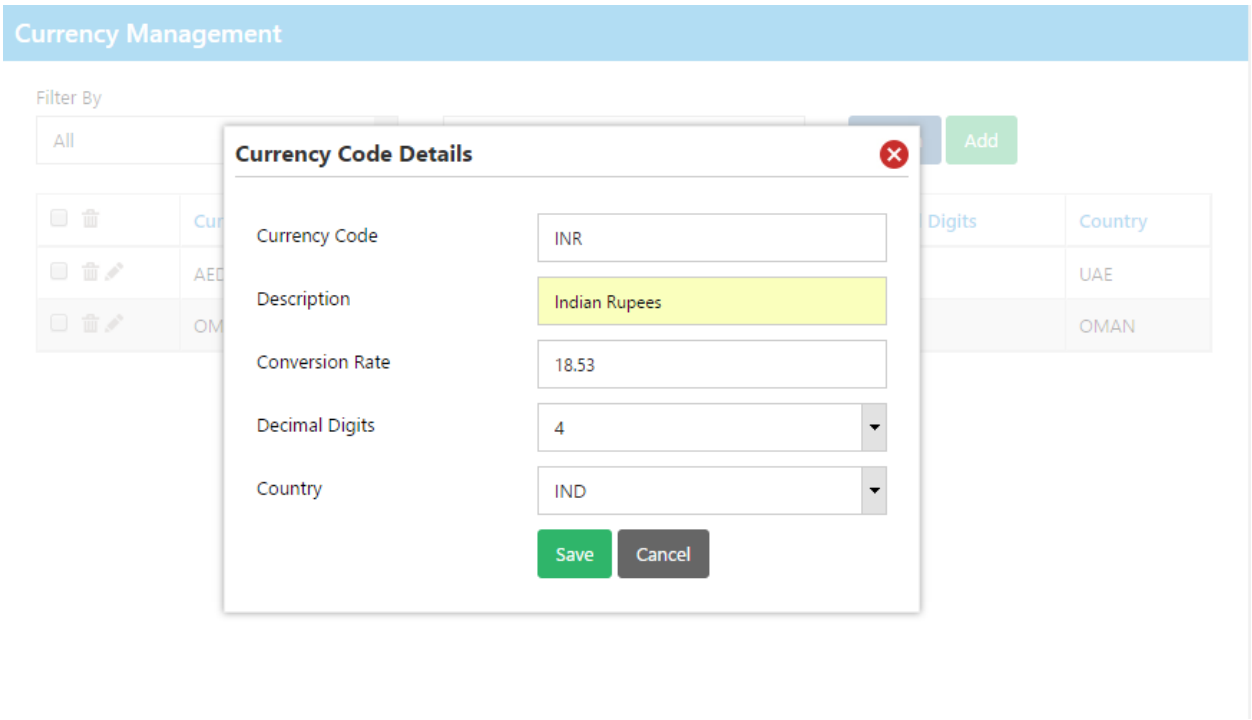
4.1.3 Manage Currency

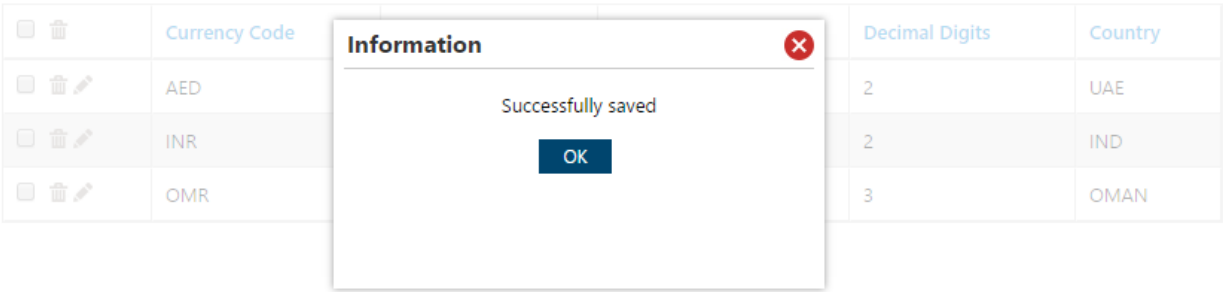
Manage currency is used to add, modify or delete a currency in the system.

To add a currency, go to Manage Currency and click on Add.



Enter the currency code, description, conversion rate, the decimal points and the country. Then click on Save to confirm the settings.

You will receive an acknowledgement as follows.



To edit a currency, click on Edit icon on the row of table.

To delete a currency, click on Delete icon. A confirmation will be asked during deletion, click on OK to confirm.

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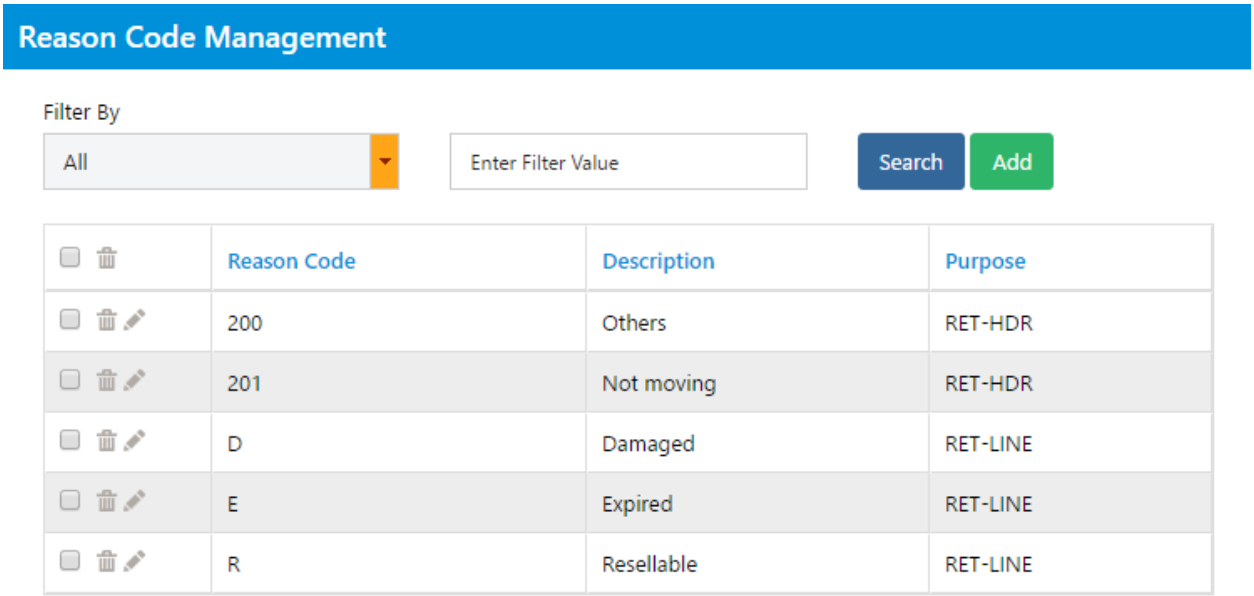
4.1.4 Manage Reason Code

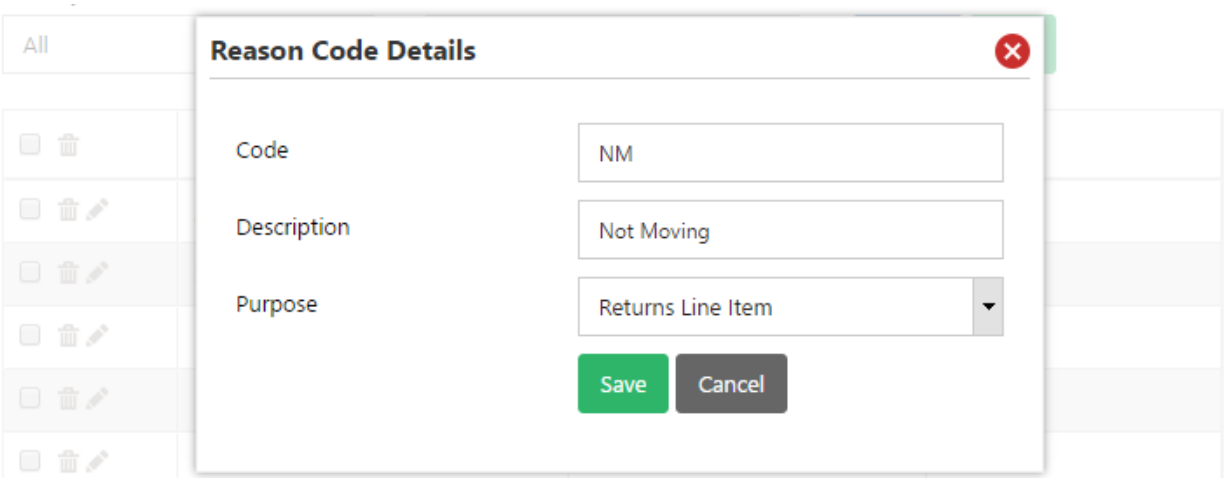
Reason codes are the reasons that will be displayed in the dropdown when an item is being returned in mobile application. The reason code can be at line level or at header level.



To add a reason code, click on Add button.

Enter a reason code and description.

Choose the purpose, either to display the reason in item level, or in header level.



Click on Save to save the changes.

You can Edit/Delete the reason codes by clicking on the Edit or Delete button available against the reason code.

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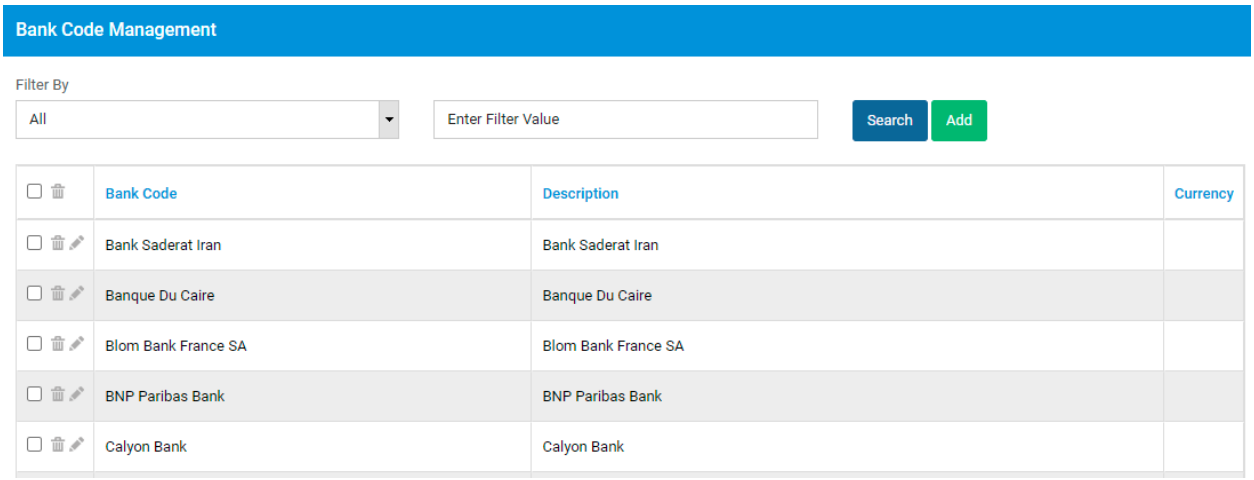
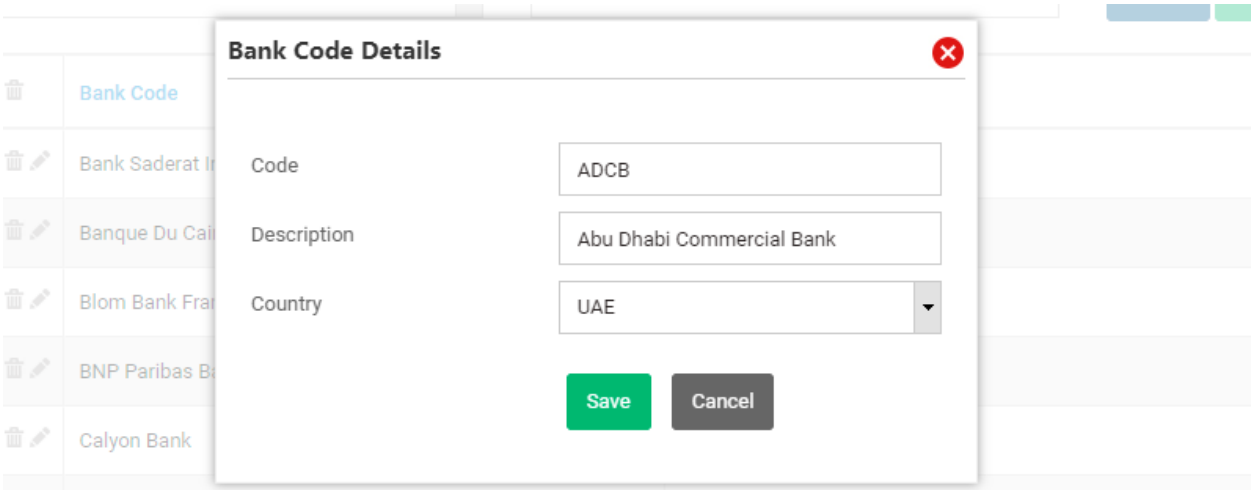
4.1.5 Manage Bank Code

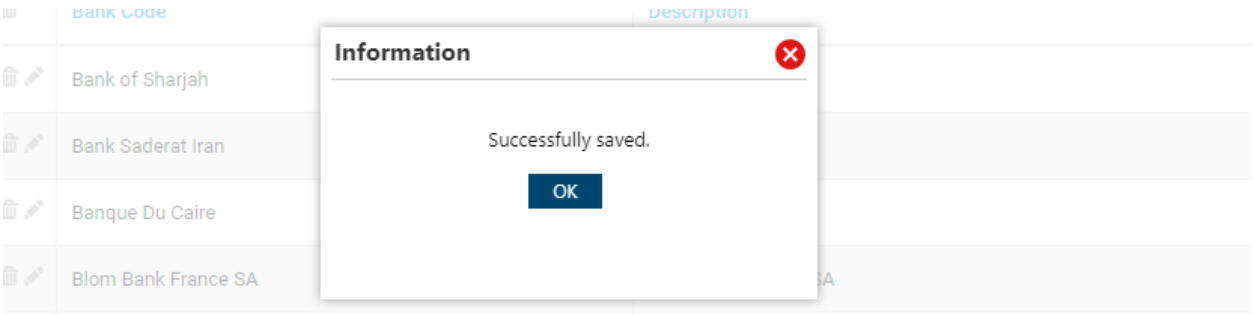
Manage Bank Code is the screen wherein you define the list of Banks. This list of banks will be displayed in mobile application while taking a collection.



To add a new bank in the list, user can click on Add button.



Enter the bank details and click on Save button.



Record will be saved and confirmation message will be displayed.

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To edit or delete an existing bank, click on Edit or Delete button against a bank.

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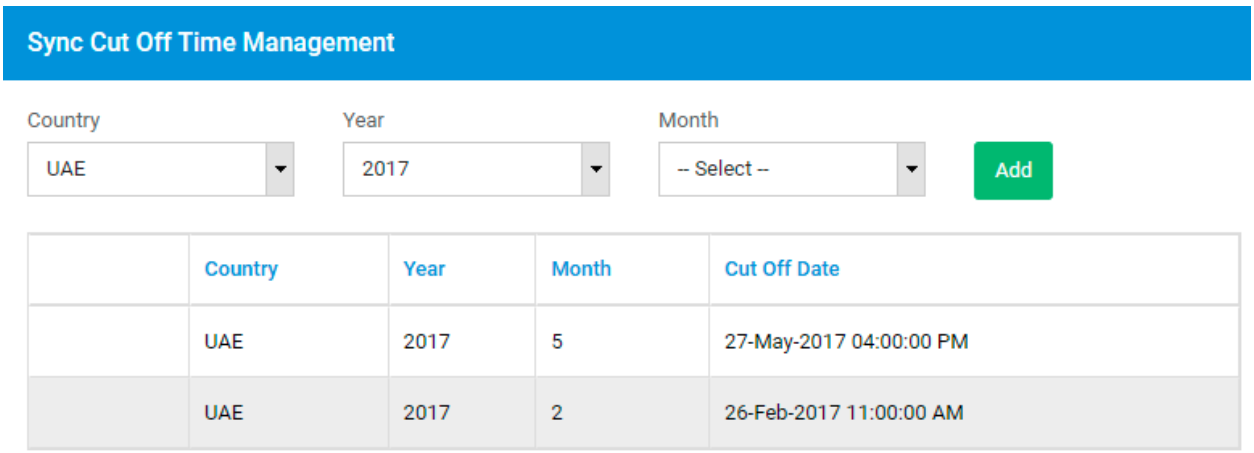
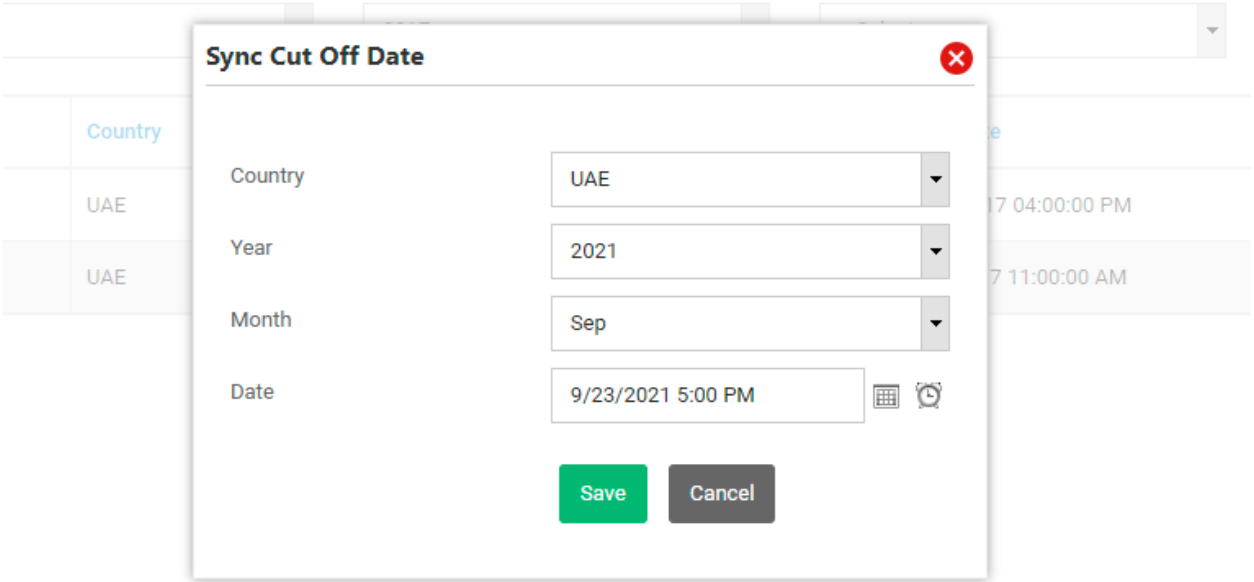
4.1.6 Sync Cut Off Date

After a sync cut off date and time is set, all the transactions that are submitted after the specified cut off time will not be sent to ERP. Transactions submitted post this cut off time will be sent to ERP along with the next day's transactions.



To define a cut off time, click on Add button.



Fill in the cut off time information, and click on Save.

Information will be saved and a confirmation message will be displayed.

If an existing cut-off date & time is a future date, you will be able to modify it by clicking on the edit button against the record.

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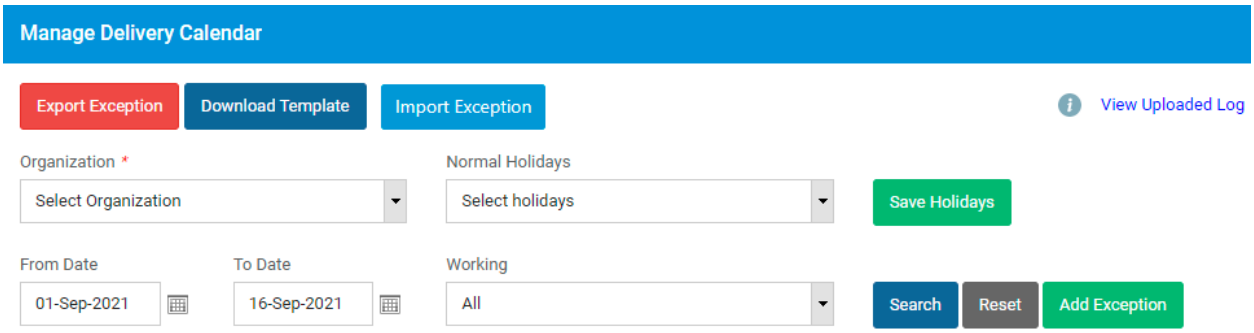
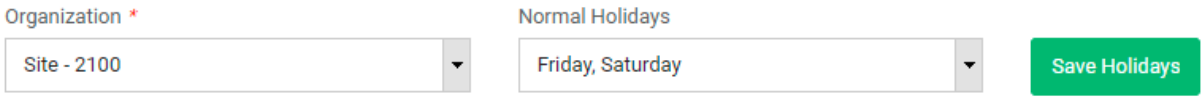
4.1.7 Manage Delivery Calendar

Delivery Calendars are used in case of presales operations, wherein a preferred delivery date is captured by FSR while confirming a presales order.

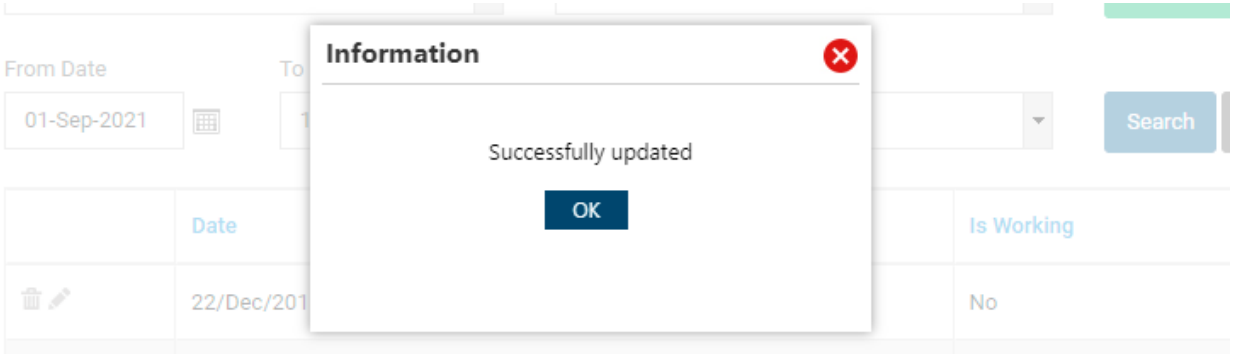
Delivery calendars allows users to mark a day as a day which will not have delivery operations. You will be able to define the normal holidays of a week, and also the exceptions which will override the normal working/non-working days definition.



To define a weekday as a holiday, select the organization and select the non-working days of a week from the drop down.



Click on Save Holidays to set selected days as holidays. A confirmation message will be displayed.



Exceptions to working day or non-working days can be added by clicking on Add Exception button.

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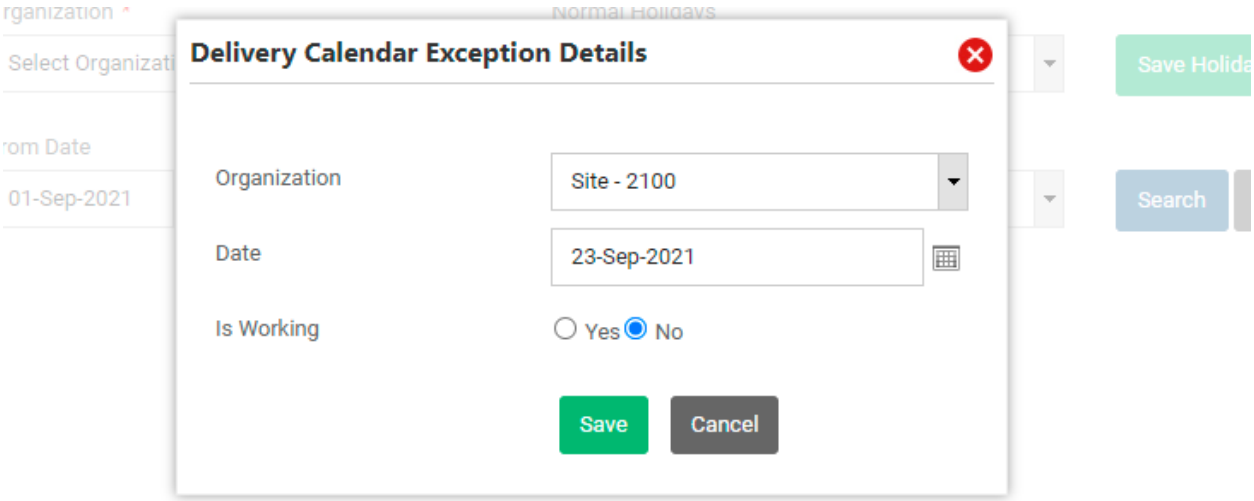
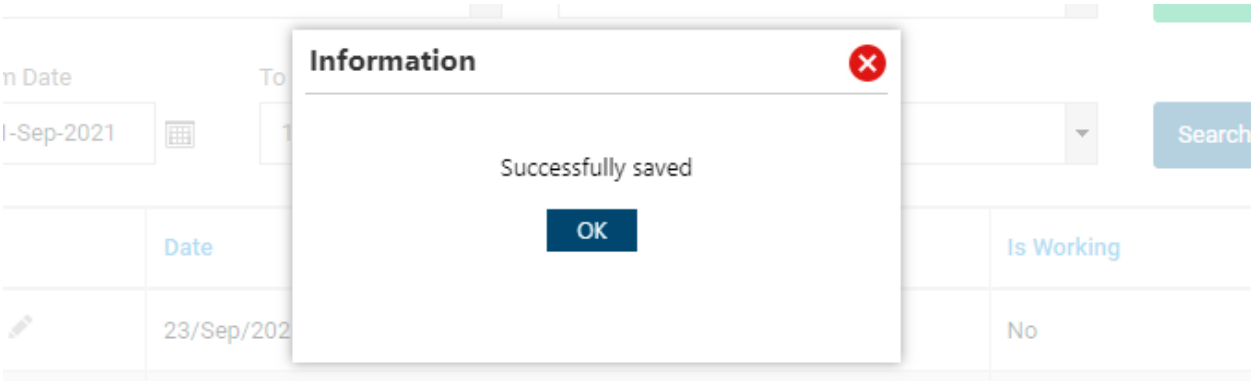
Select Organization and a date. Make a note whether the selected date is a working day or not.

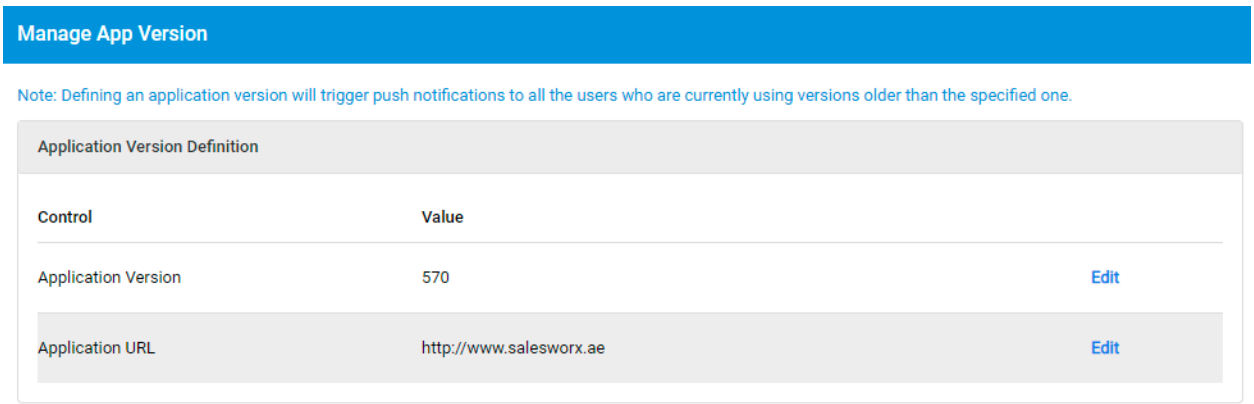


Click on Save. The exception will be saved and a message will be displayed.



4.1.8 Manage App Version

Manage App version screen can be used to define the mobile application version number that is to be used by FSRs. Any users who are using older versions of the application will receive periodical push notifications informing them to update their app version.



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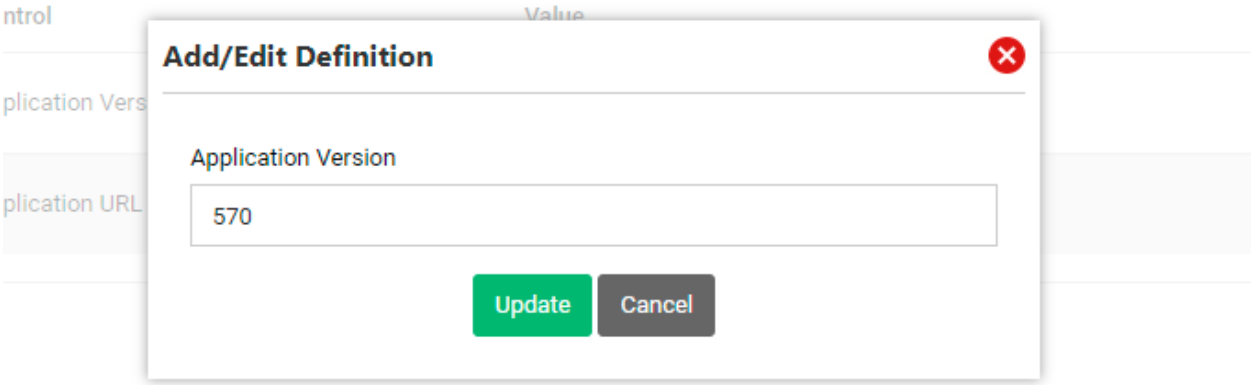
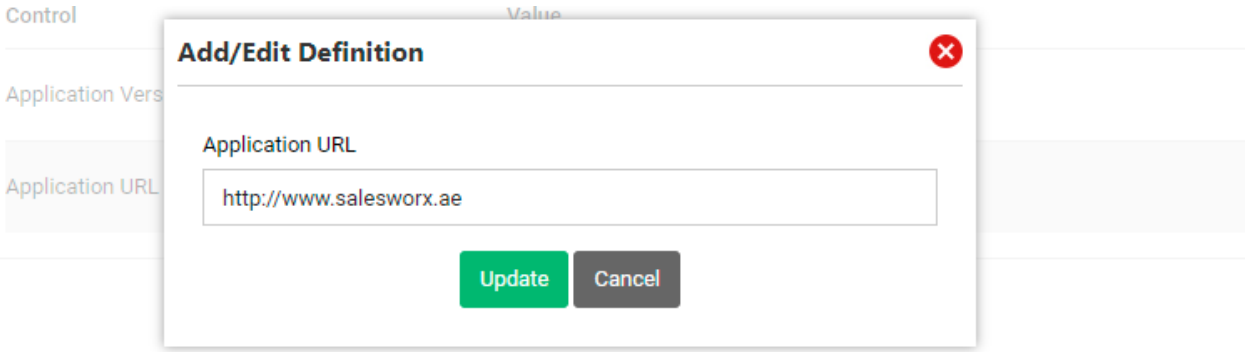
To define the ideal app version, click on Edit button against Application Version field. Set a version number and click on Update button.



The definition will be saved and a message will be displayed.

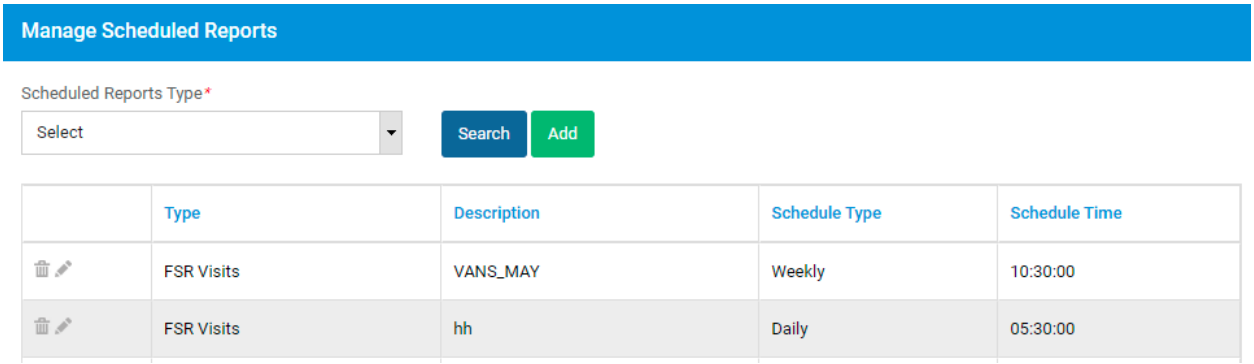
The URL to download the application can be defined. This can be defined by clicking on Edit button against Application URL field.



Enter the URL and click on Update. Definition will be saved and a message will be displayed.

4.1.9 Manage Scheduled Reports

This screen will be used for scheduling the reports triggered as emails to the mail address defined in Manage Users screen.



To schedule a new email of a report, select a report type and click on Add button.

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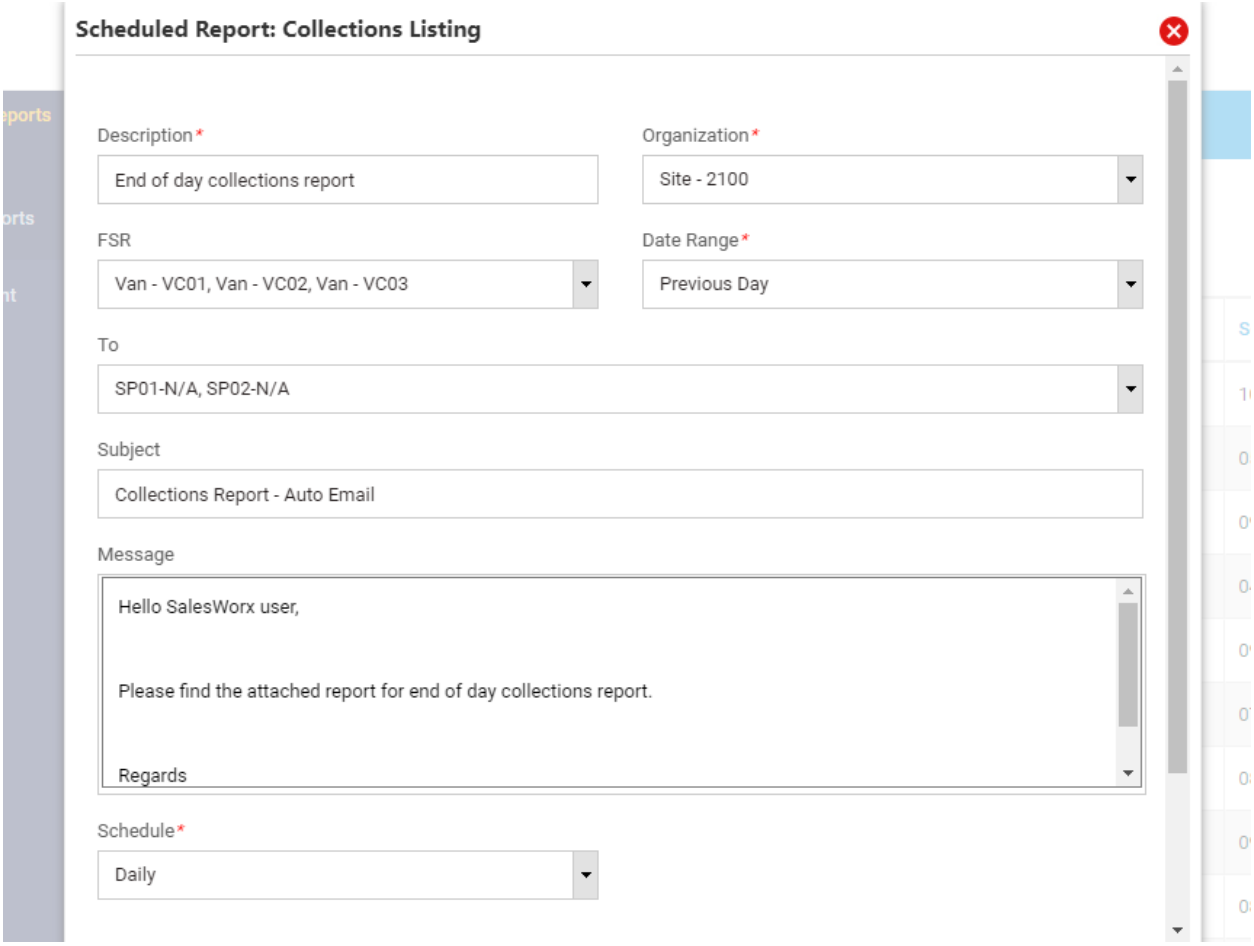
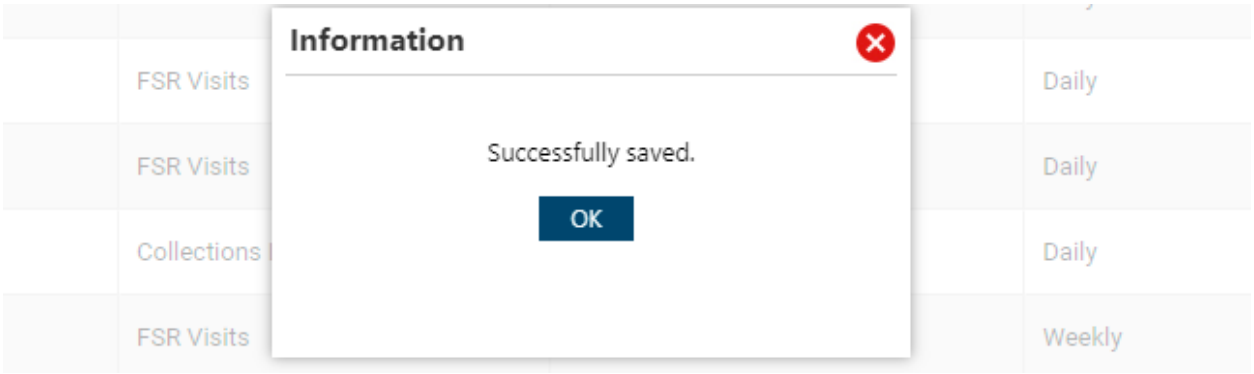


Fill in all the required details and then click on Save button.



Automated email schedule will be saved. Emails will be triggered at the time and frequency that is defined.

Note: SMTP configuration has to be done in order to use this functionality. Contact SalesWorx support team for assistance. Email addresses of the recipients are to be defined in Manage Users screen.

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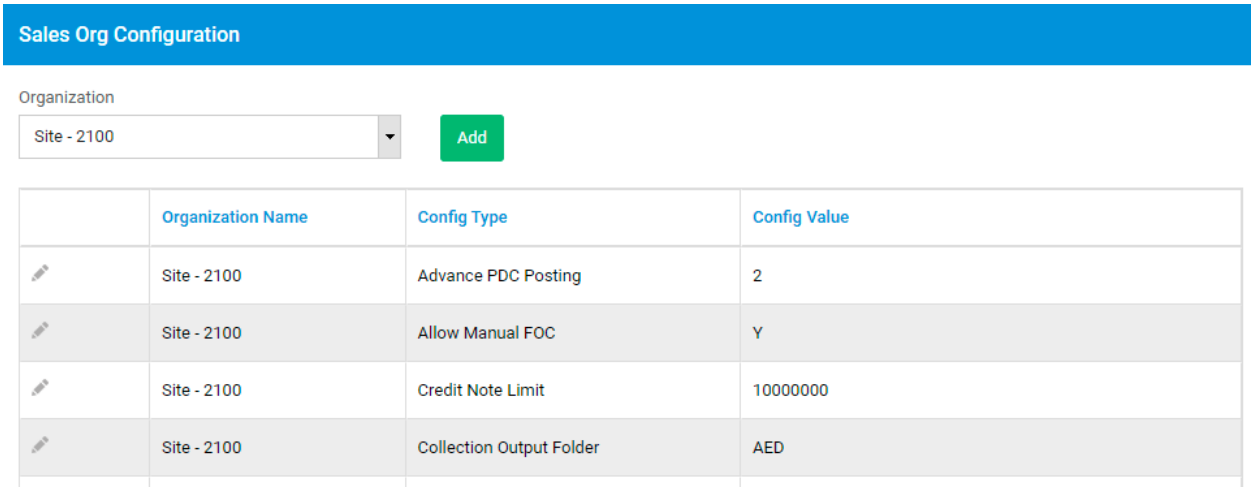
4.2 Organization Settings

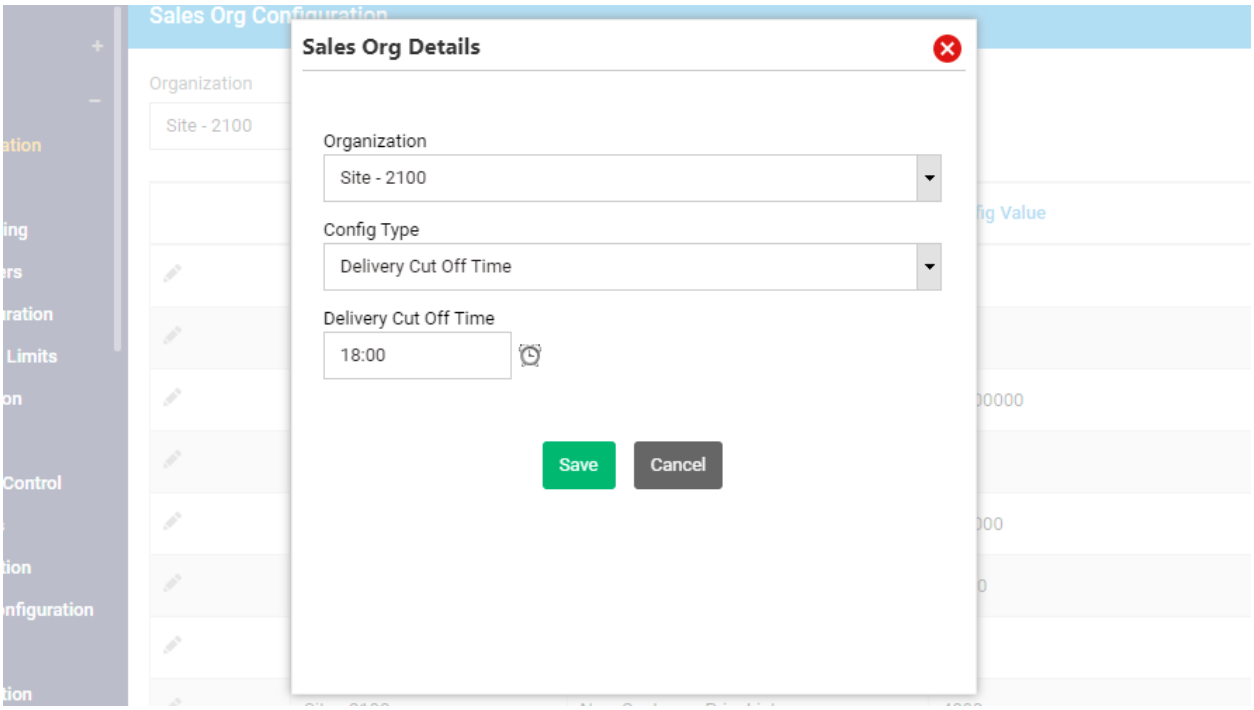
You can change the settings related to your organization, divisions, or vans in this module.

4.2.1 Sales Org Configuration

You can define or modify your division specific settings in this section. Select a division from the dropdown to view current configurations.



To add a new configuration, click on Add button.



Select a configuration type and set the configuration value. Click on Save button.

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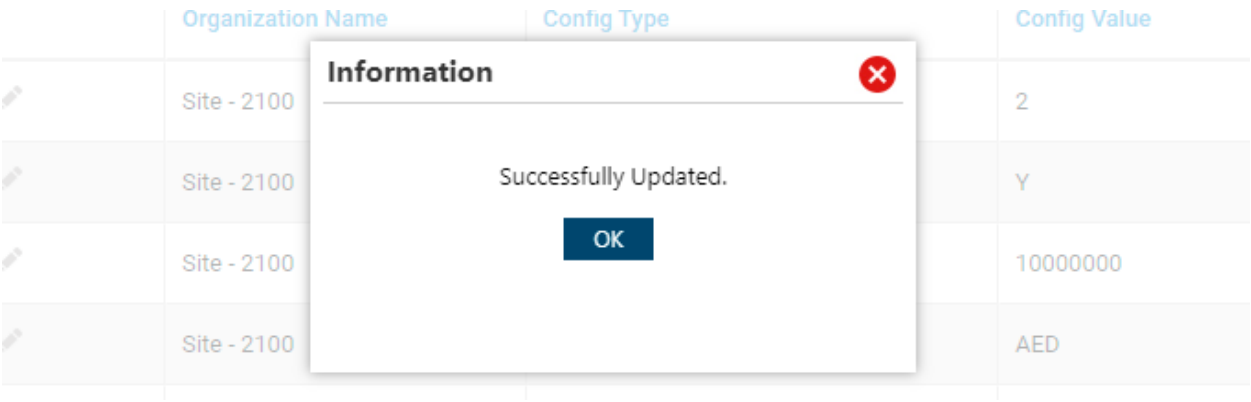
The definition will be saved and a message will be displayed.



To modify an existing configuration, you can click on the edit button that is displayed against the configuration type that you wish to modify.

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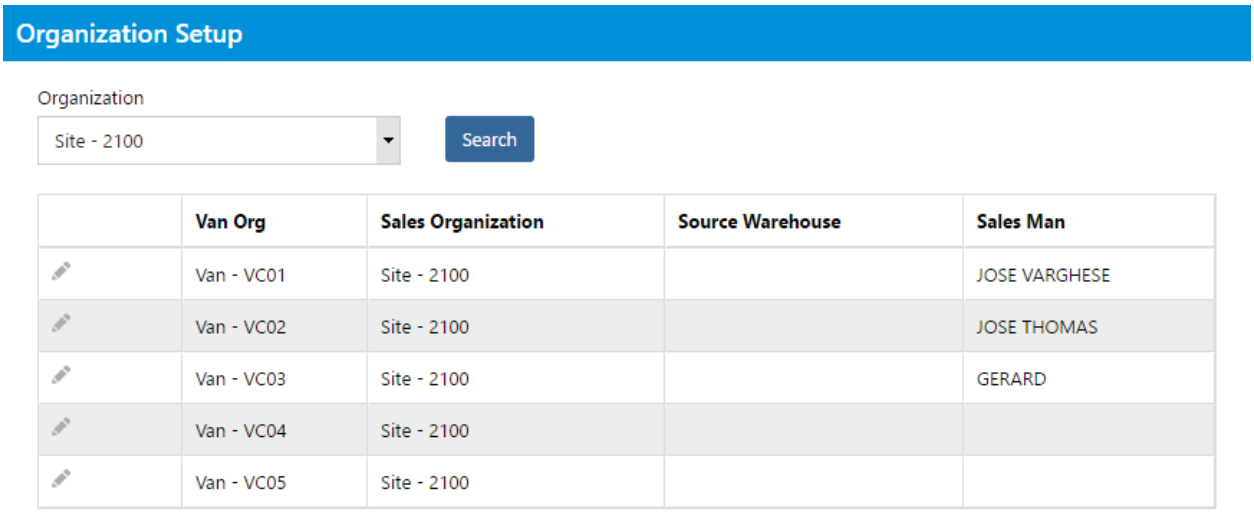
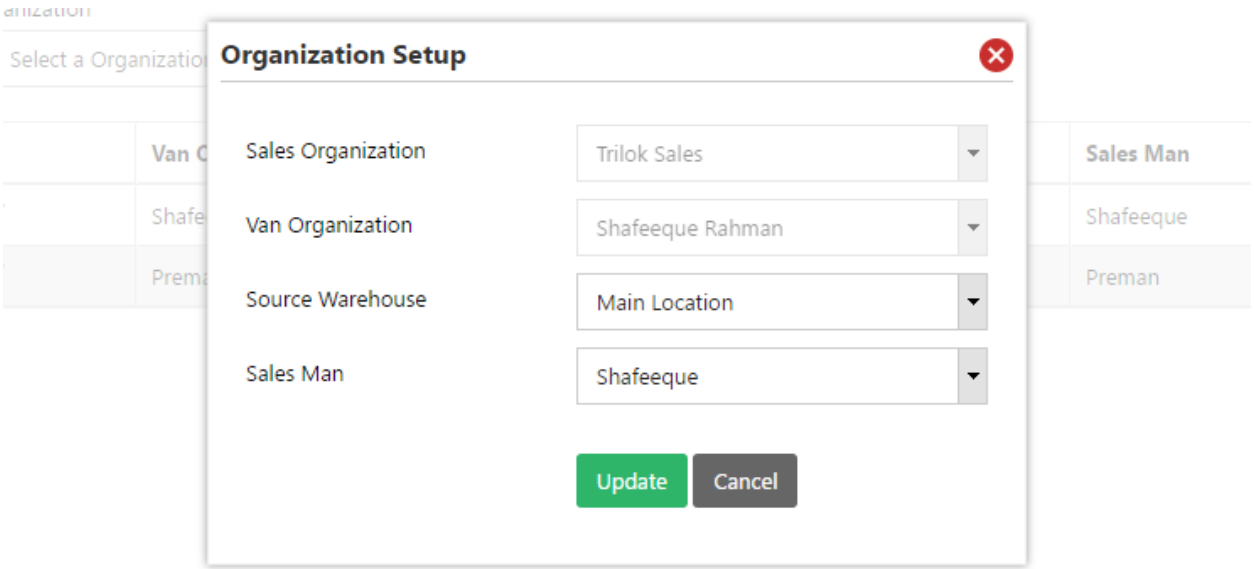
4.2.2 Organization Setup

You can assign the vans of an organization, and source warehouse to a sales man using this option.



	Van Org	Sales Organization	Source Warehouse	Sales Man
	Van - VC01	Site - 2100		JOSE VARGHESE
	Van - VC02	Site - 2100		JOSE THOMAS
	Van - VC03	Site - 2100		GERARD
	Van - VC04	Site - 2100		
	Van - VC05	Site - 2100		

To assign, click on edit button on the table.



Select warehouse and salesman, and then click on Update button.

You can edit the existing mapping by clicking on the Edit button available in tabular view.

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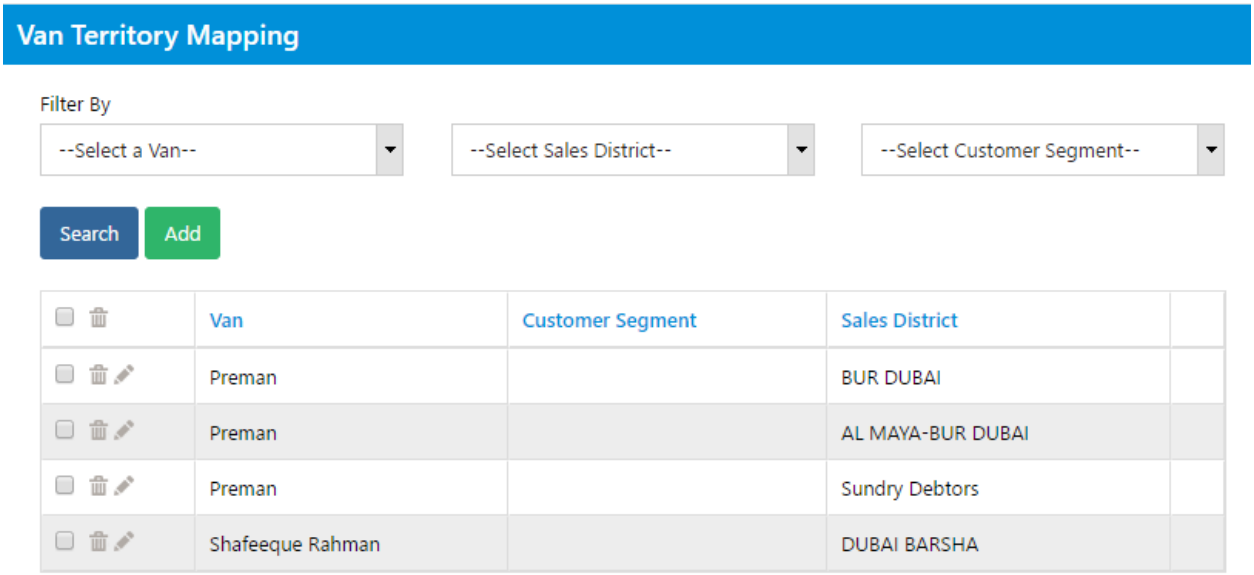
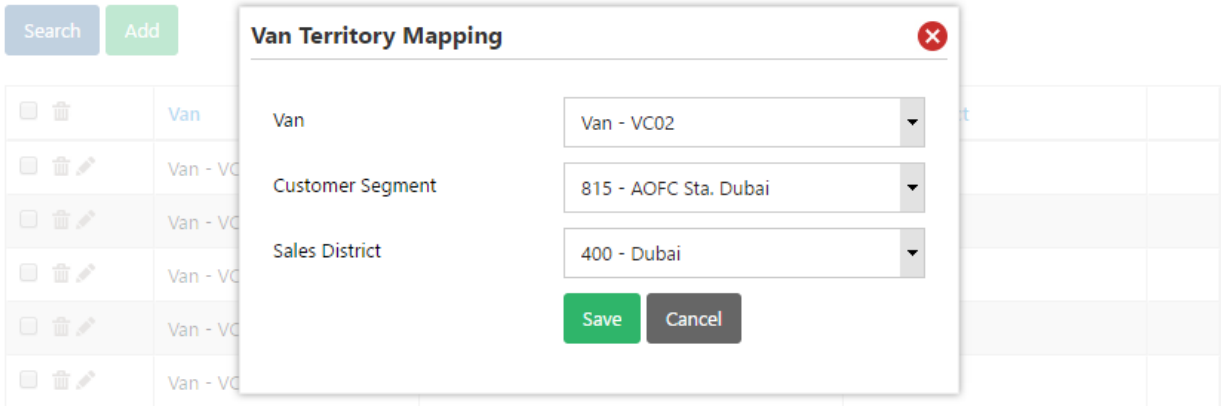
4.2.3 Van Territory Mapping

This option enables you to assign a van to a sales district or a customer segment. The FSR will only be able to view customers in the territory assigned to him/her.



To assign a sales district to an FSR, click on Add button.



Select a customer segment and a sales district, click on Save.

To edit and delete an assignment, click on edit and delete icon in the table respectively.

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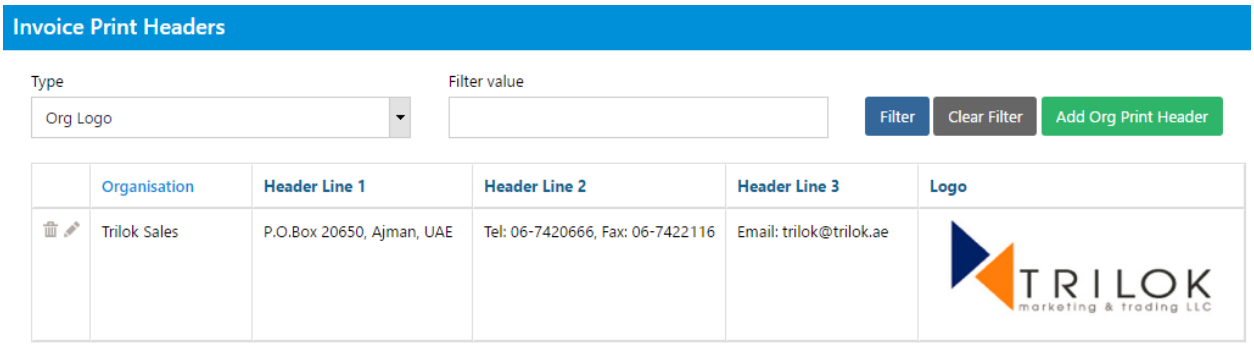
4.2.4 Invoice Print Headers

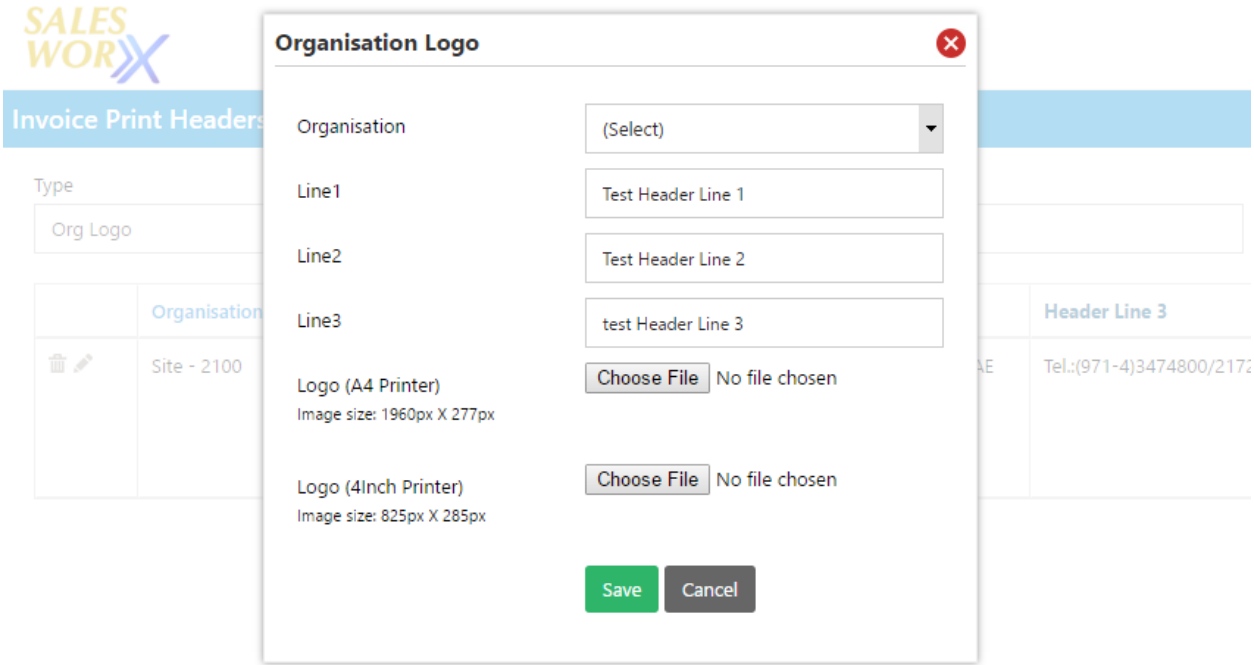
You can set a logo and the header text that will be printed in the invoice, using this option.



Click on Edit button to modify an existing invoice header.

Click on Delete button to delete an entry.

To add a new print header, click on Add Org Print header button.



Enter the text for header lines and choose logo file. Click on Save to save the changes.

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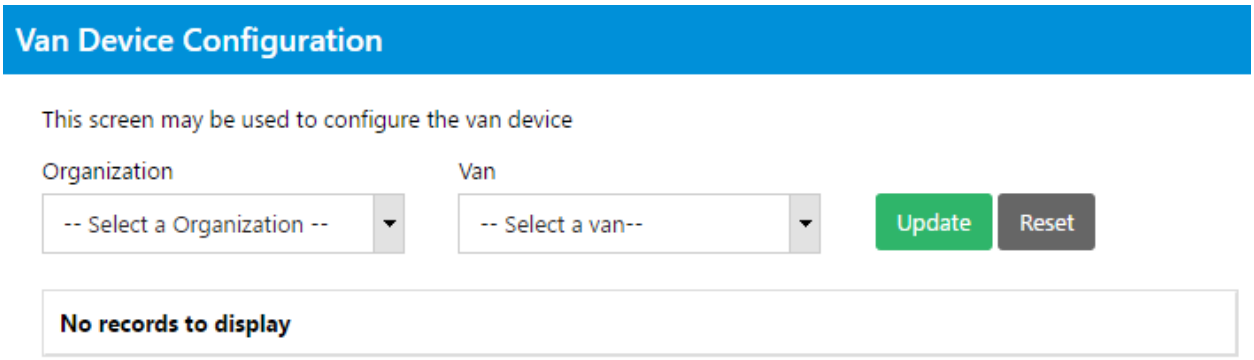
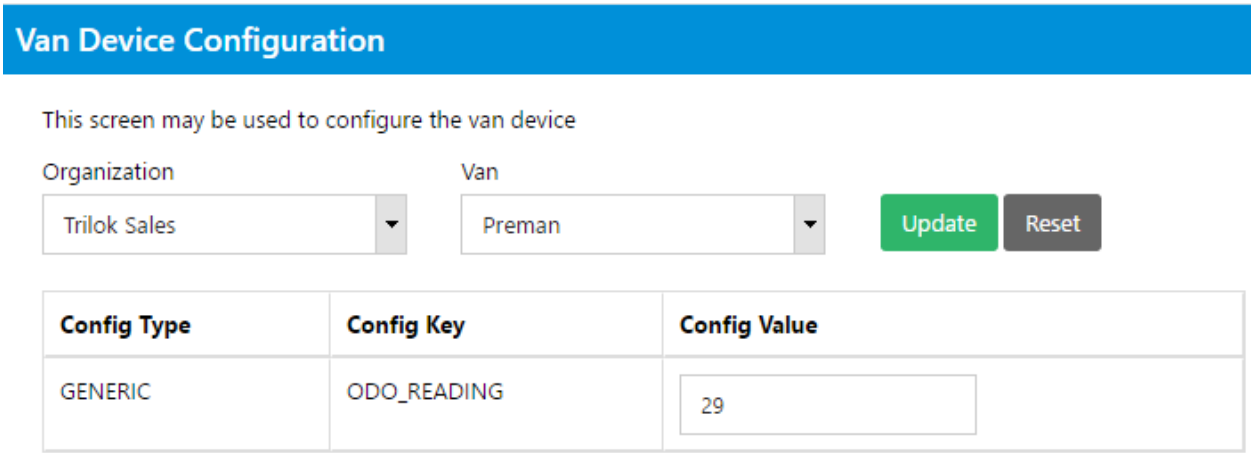
4.2.5 Van Device Configuration

The odometer reading of the vans can be set here.



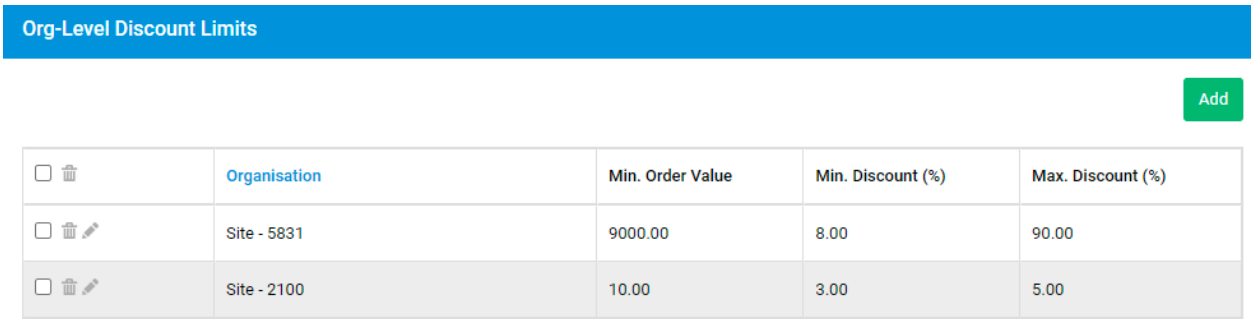
Choose an organization, select a van.



Enter the reading, and click on Update button.

4.2.6 Org-Level Discount Limits

You can set a discount limit for an organization using this option.



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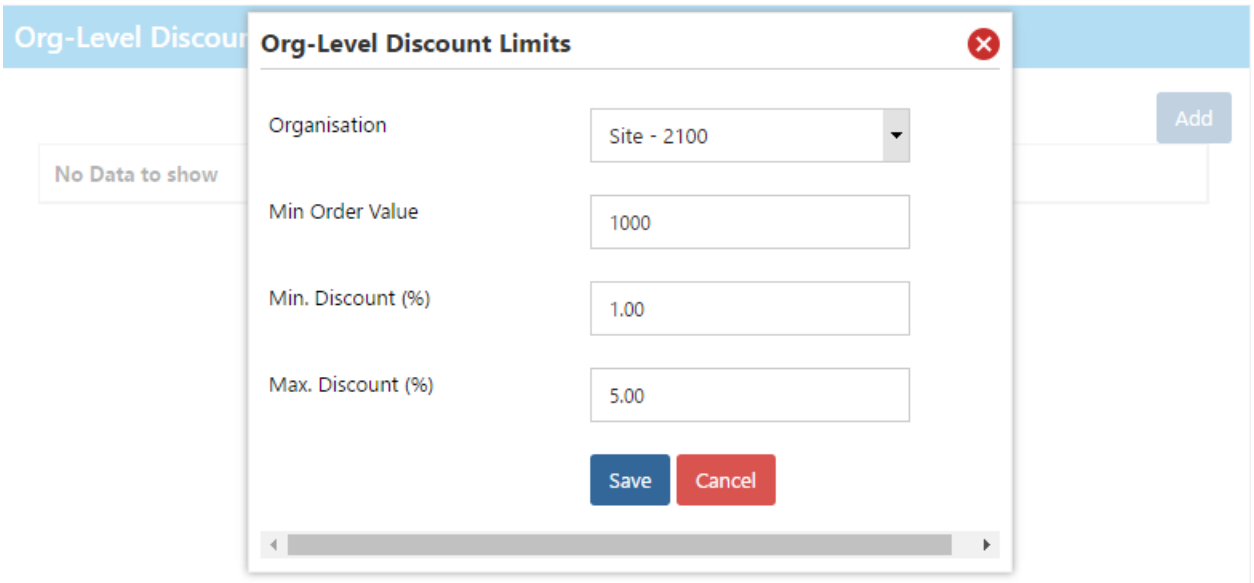
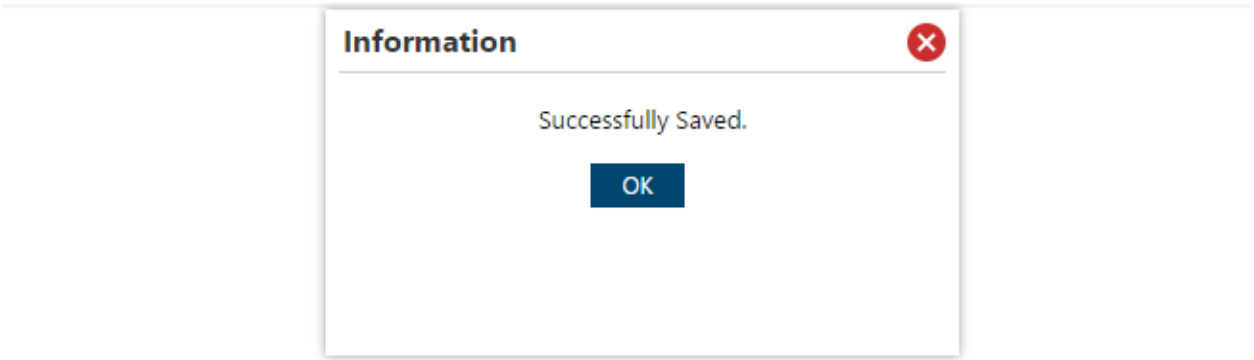
To set a limit, click on Add button.



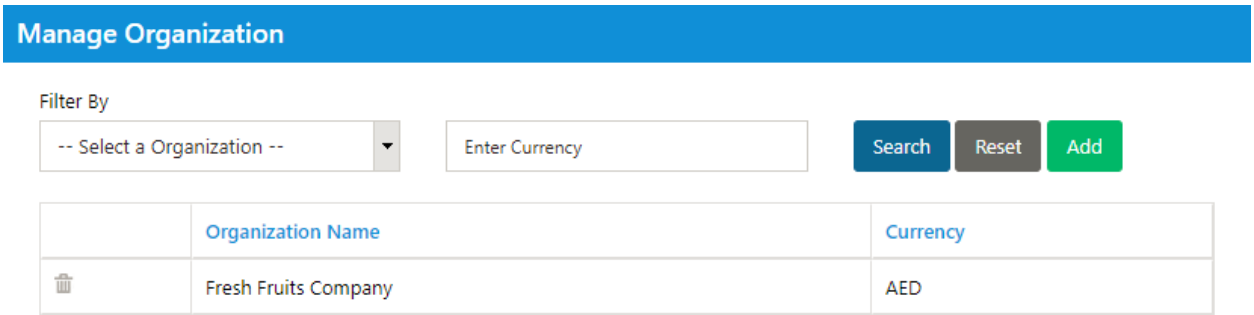
Enter minimum order value, minimum discount, maximum discount and click on Save.



Definition will be saved and a message will be displayed.

4.2.7 Manage Organization

In Manage Organization screen, you will be able to create or delete organizations.



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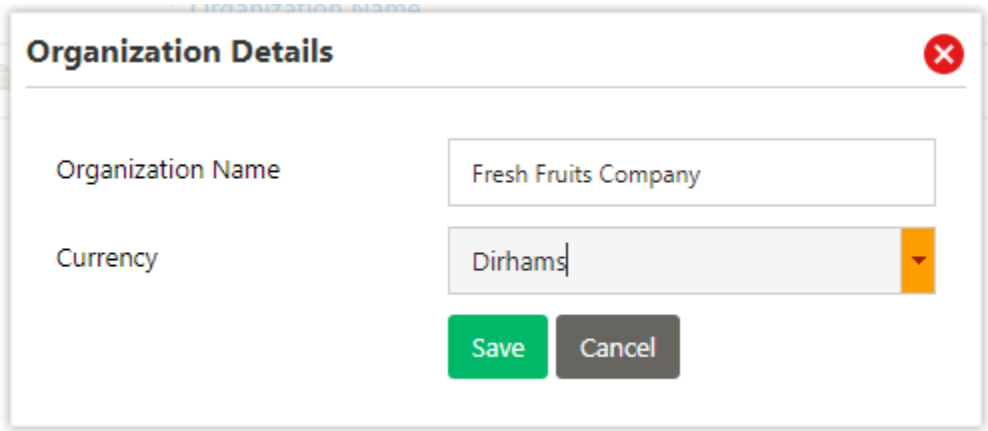
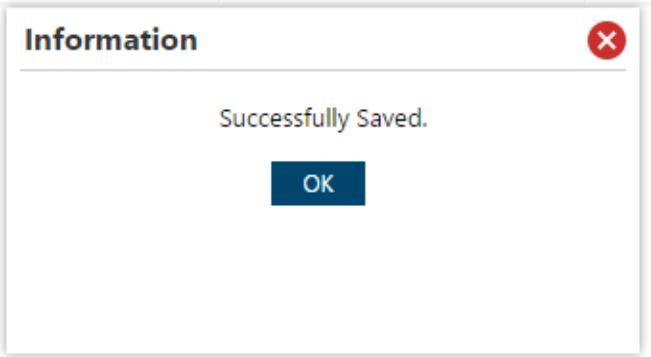
To add a new organization, click on **Add** button.

Enter the organization name, select currency and then click on **Save**.



You will get an acknowledging message 'Successfully saved'.



You can delete an existing organization by clicking on Delete button against an organization listing.

4.2.8 Manage Van

This screen provides you options to create a new van, edit an existing van, and delete a van. You can also Import list of vans using an XLS file. Click on **Download Template** button in order to download the template. To export the existing list of vans, click on **Export Van** button.

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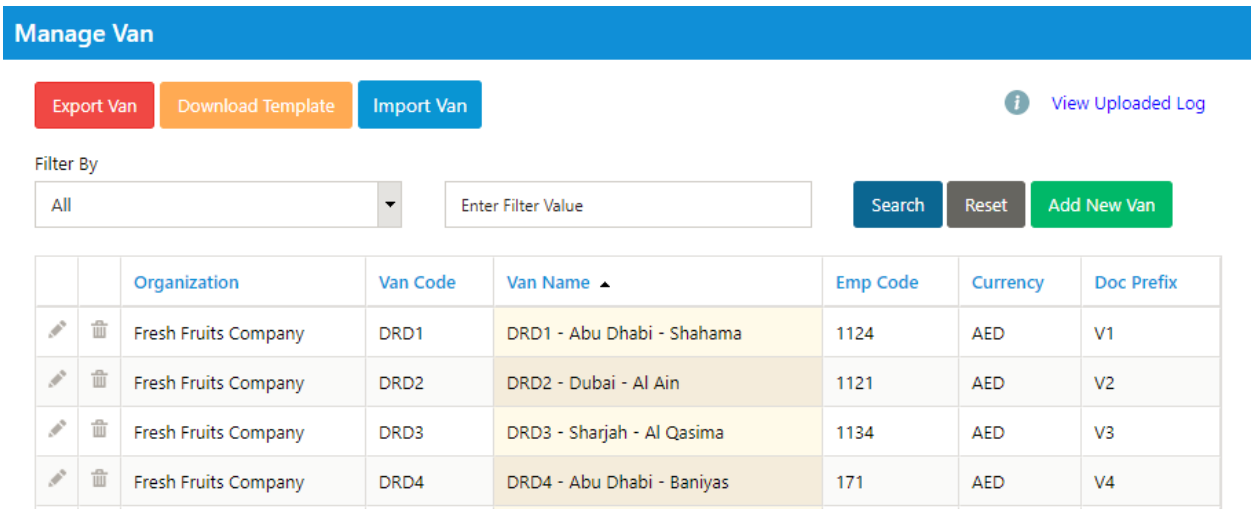
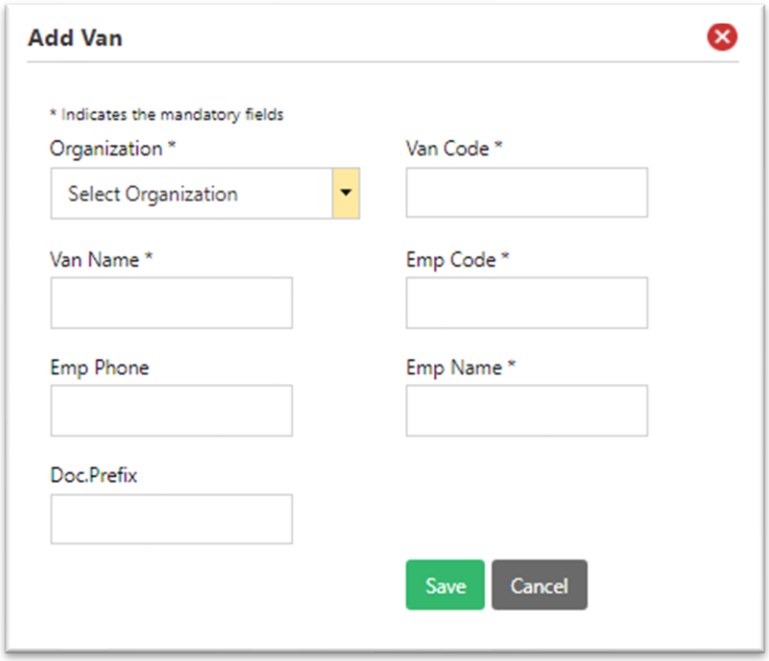


To create a new van, click on **Add** button.



Select an organization from the drop down. Type in the details related to that van and the employee linked to that van. Mention the document prefix if required. Then click on **Save**.

In order to edit an existing van, click on button. To delete a van, click on button.

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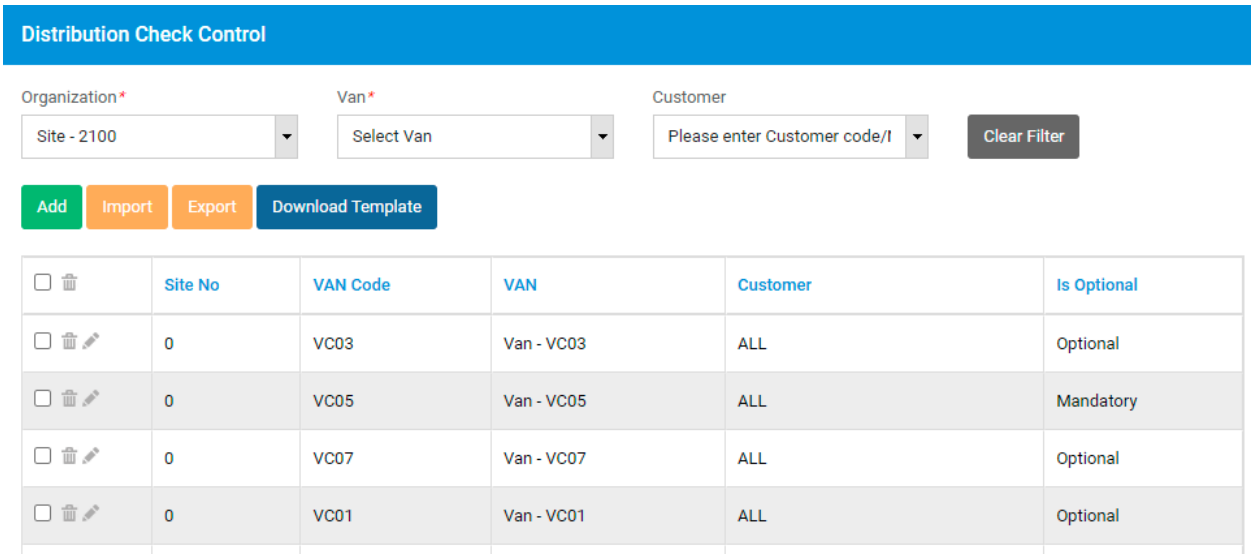
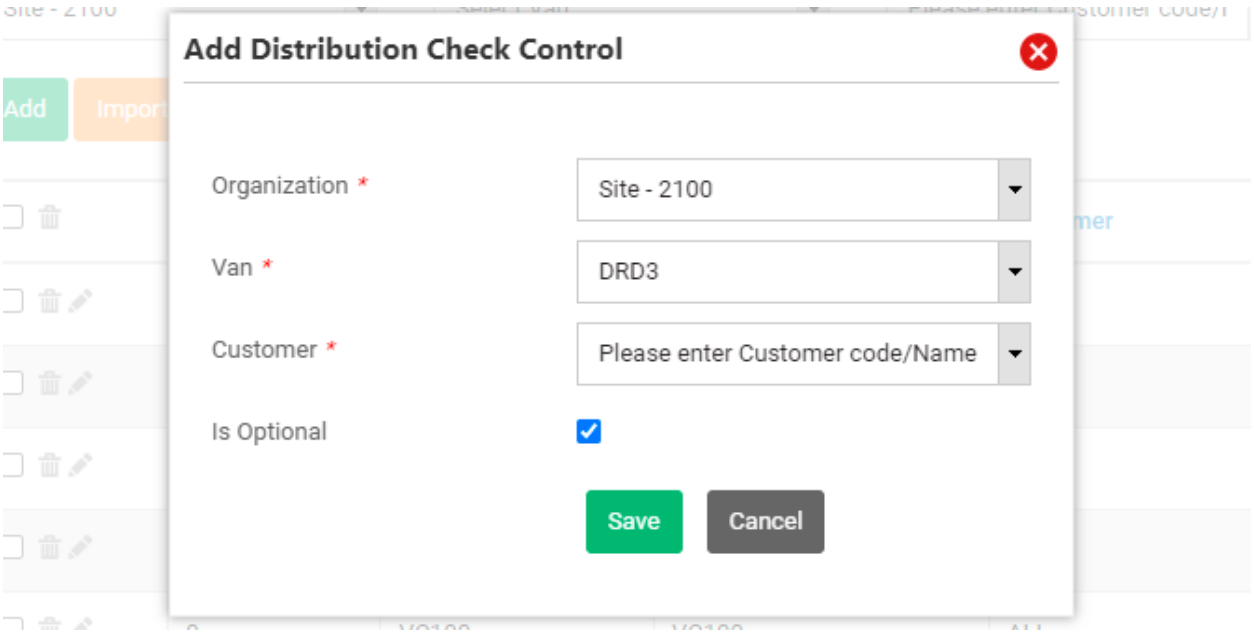
4.2.9 Distribution Check Control

Using the Distribution check control definition screen, you will be able to define whether distribution check activity is mandatory or optional during a customer visit.



To add a new control, click on Add button.



If customer level control is not required, you need not select any customer from the drop down. Make a note whether the distribution check is optional or not. Click on Save button.

Definition will be added and a message will be displayed.

To edit or delete a definition, use edit or delete button available in the tabular view.

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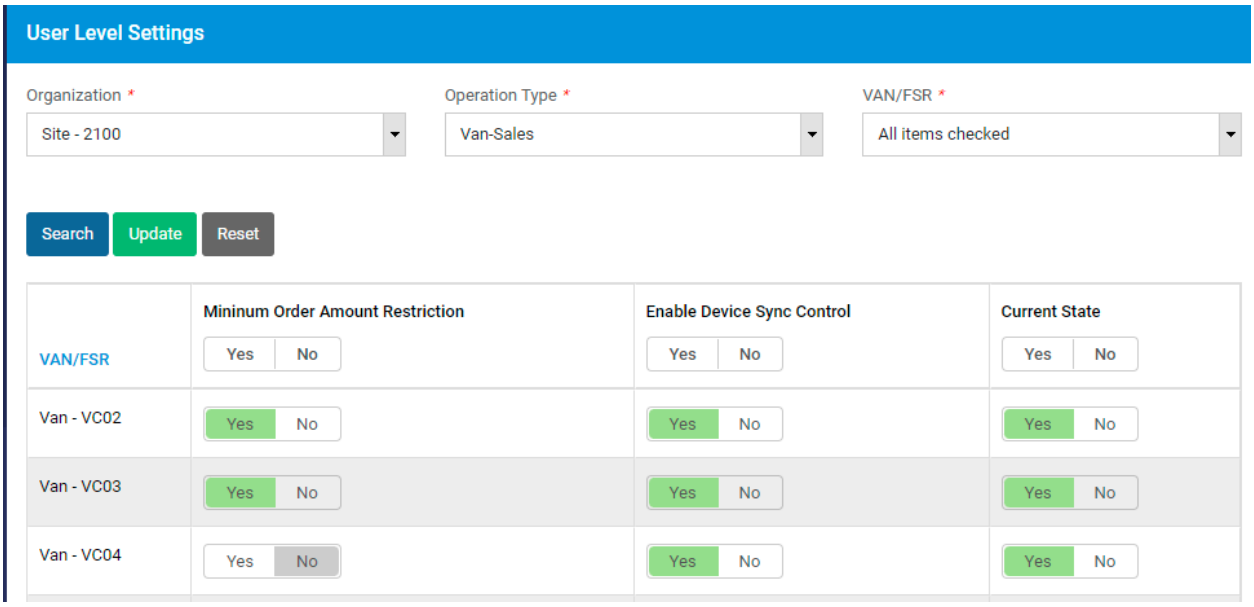
4.2.10 User Level Settings

In User level settings, the configuration that are defined at mobile application users can be managed.

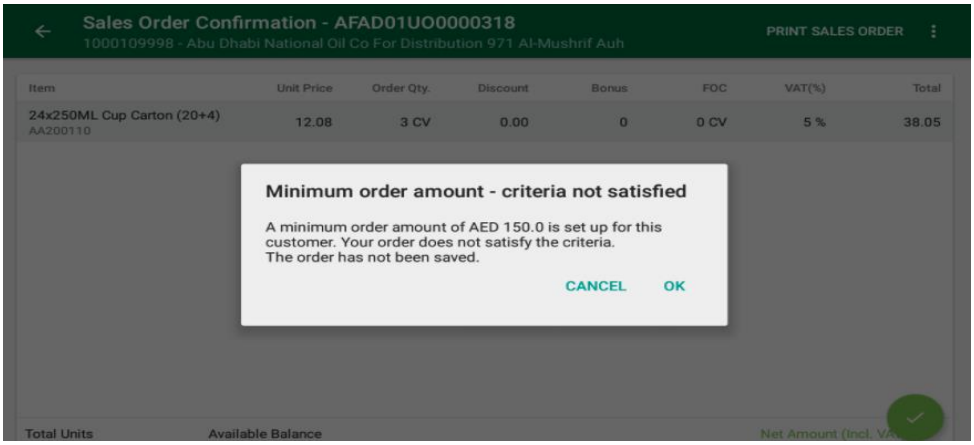


The current state of the settings will be displayed. To modify settings, use the toggle buttons and then click on Update button.

Minimum Order Amount Restriction

There is an additional flag-based provision to block the transactions below MOA amount.

Possible values: A (Allow approval-based override) / B (Block transaction).
If 'A' - then it will ask for the MOA approval
If the value is 'B' - Block transaction, the mobile device will throw a validation message and will not allow to place an order.



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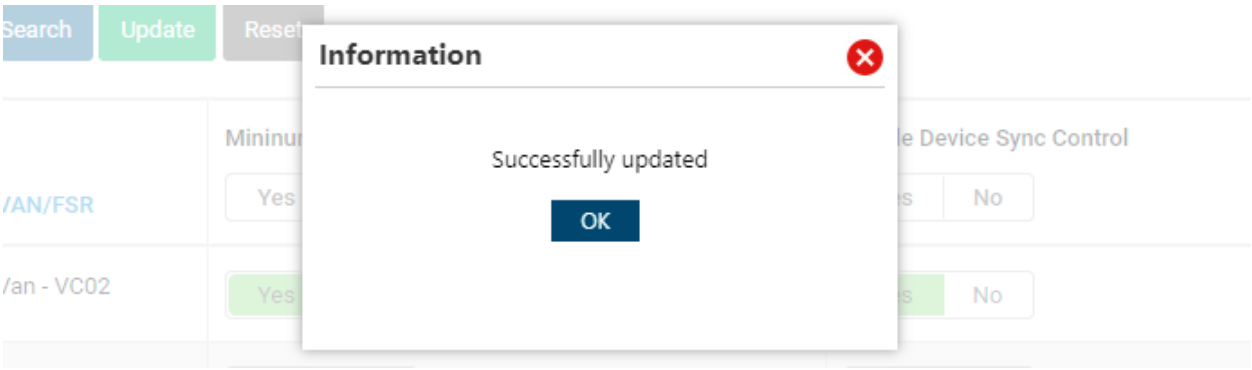
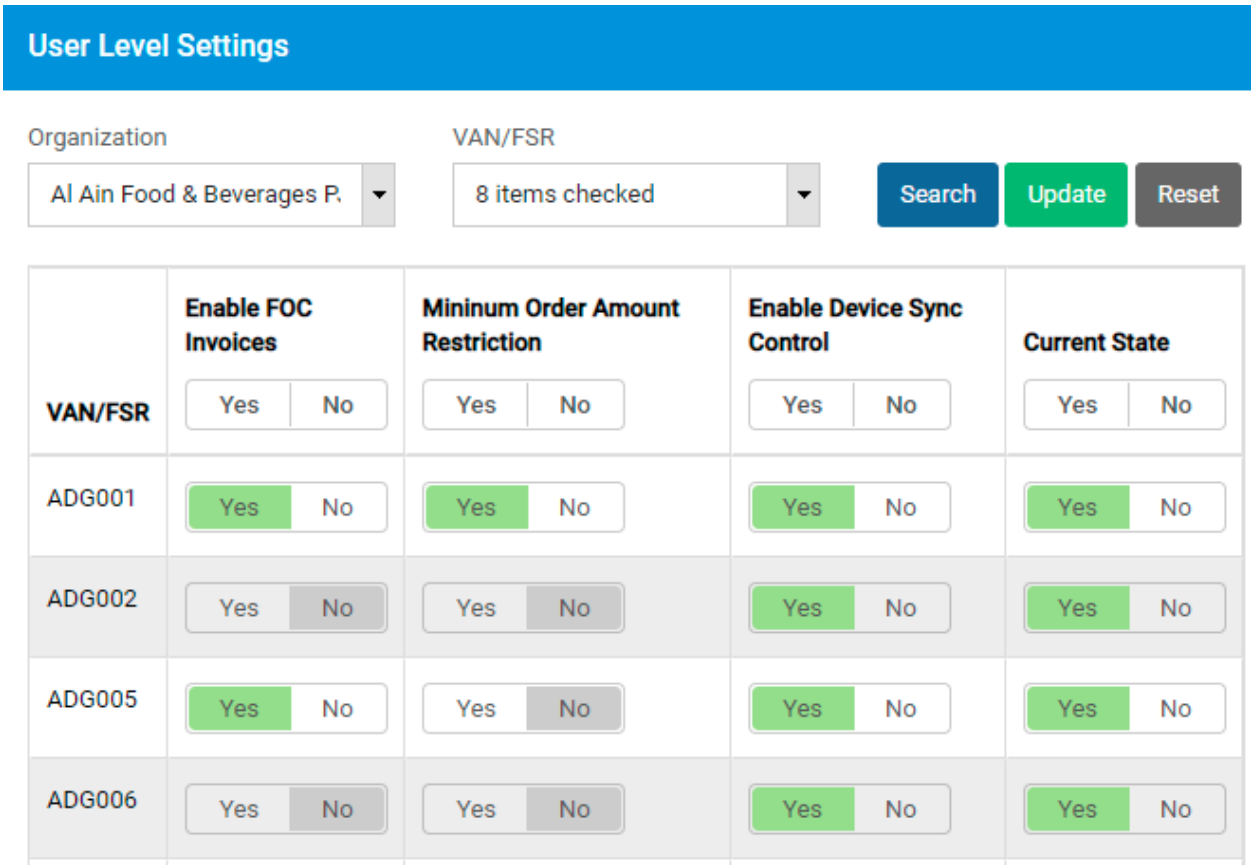
Settings will be saved and a message will be displayed.



FOC Invoices

To use FOC invoices, this option must be enabled for users.



Against the vans, under column **Enable FOC Invoices**, click on **Yes/No** buttons to **enable/disable** FOC invoices option for users.

Once FOC invoices option is enabled/disabled for required users, click on **Update** button available at top of the screen.

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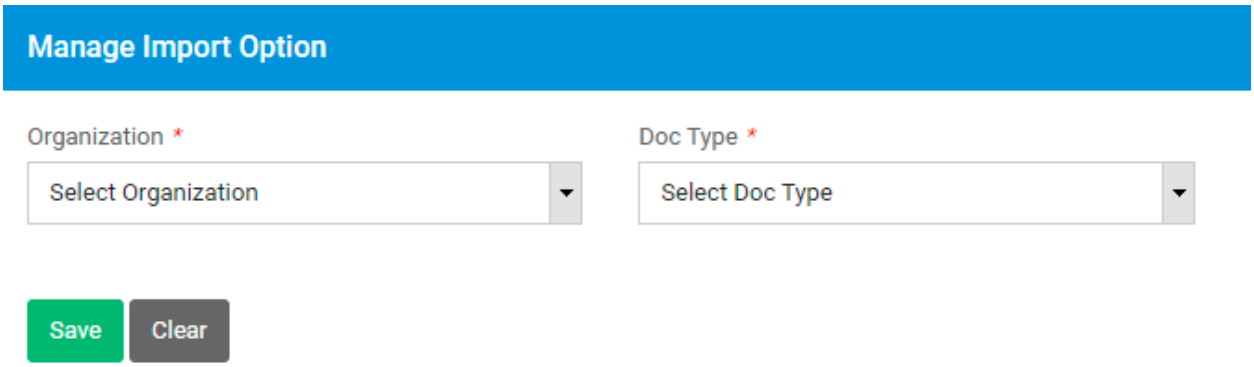
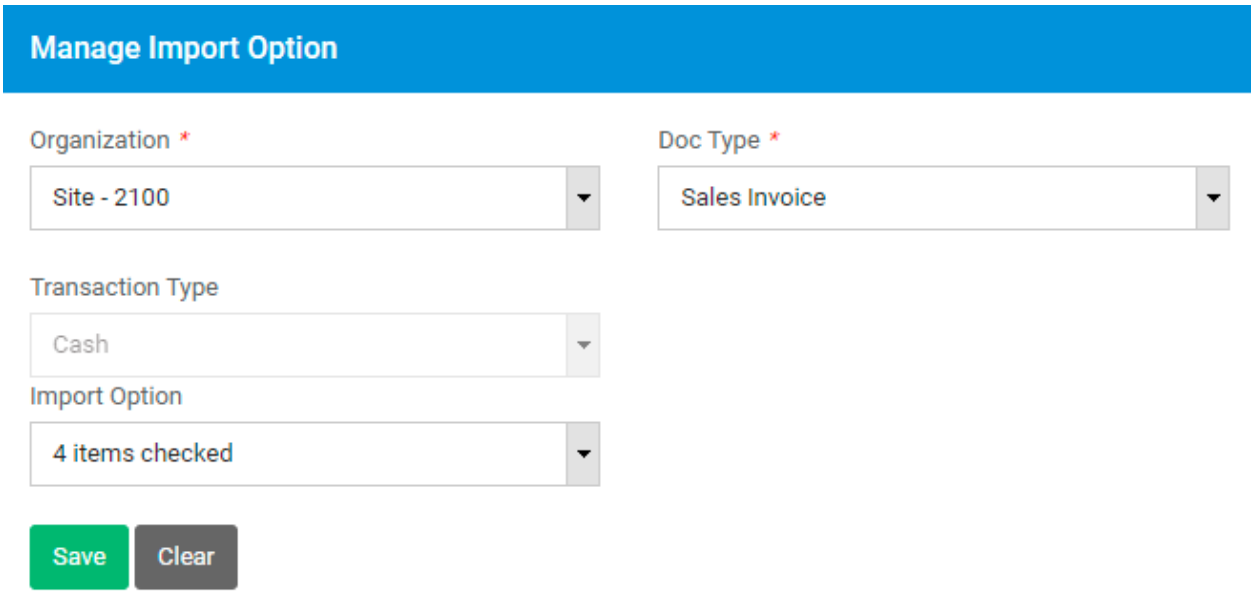
4.2.11 Manage Import Options

Import options are the list of options that will be displayed in mobile application while opening Sales Order, Returns, Presales Order screens etc. Using Manage Import Options screen, you will be able to control which are the options that are to be displayed in mobile app.



Select the organization and Document Type. The active options will be listed.

Select the import options that you wish to enable during the selected document type activity.



Click on Save to confirm the changes. A message will be displayed upon saving.

4.2.12 User Geo Fence Configuration

Geofencing is the functionality that will restrict FSR from starting a visit to a customer unless the FSR's current geolocation matches with the customer's defined geolocation. Using this screen, you will be able to define whether geofencing is to be enabled at

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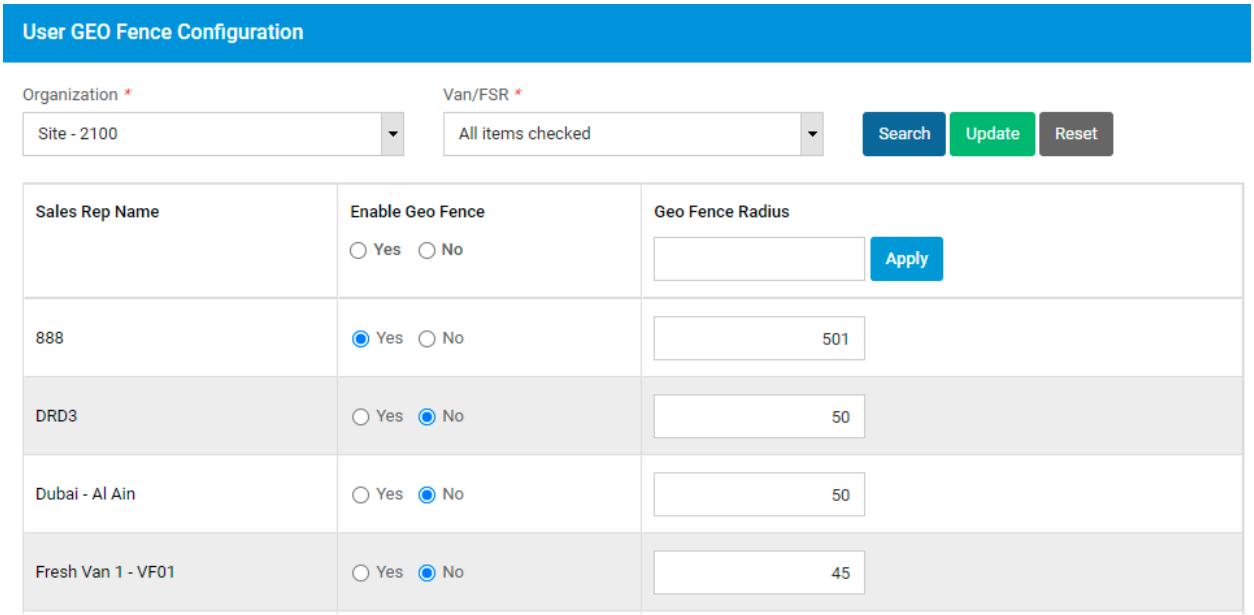
a user level or not. If it is enabled, you will also be able to specify a maximum range (in meters) within which the FSR has to be while starting a visit.

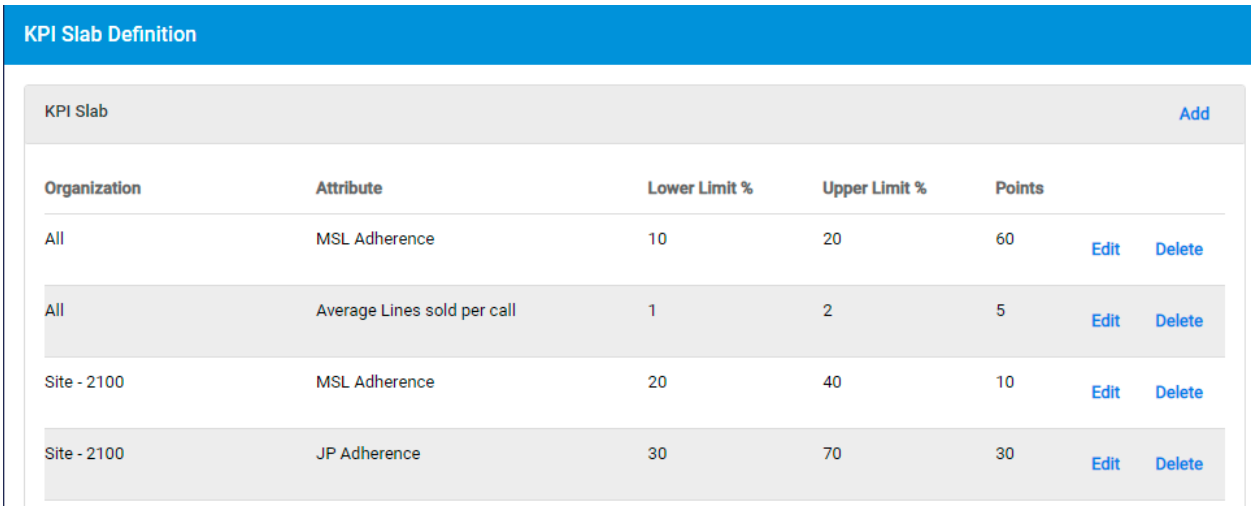


Radio buttons can be used to enable or disable the geo fencing control. Radius of geofencing can be mentioned in the text field.

After all the required configuration is done, click on Update button to save the changes.

4.2.13 KPI Slab Definition

KPI Slab Definition screen is used to define the KPIs which will be used for the KPI Points Reports (Summary Reports) calculation.



You can edit or delete the existing KPIs by clicking on Edit or Delete buttons against the KPI in tabular view.

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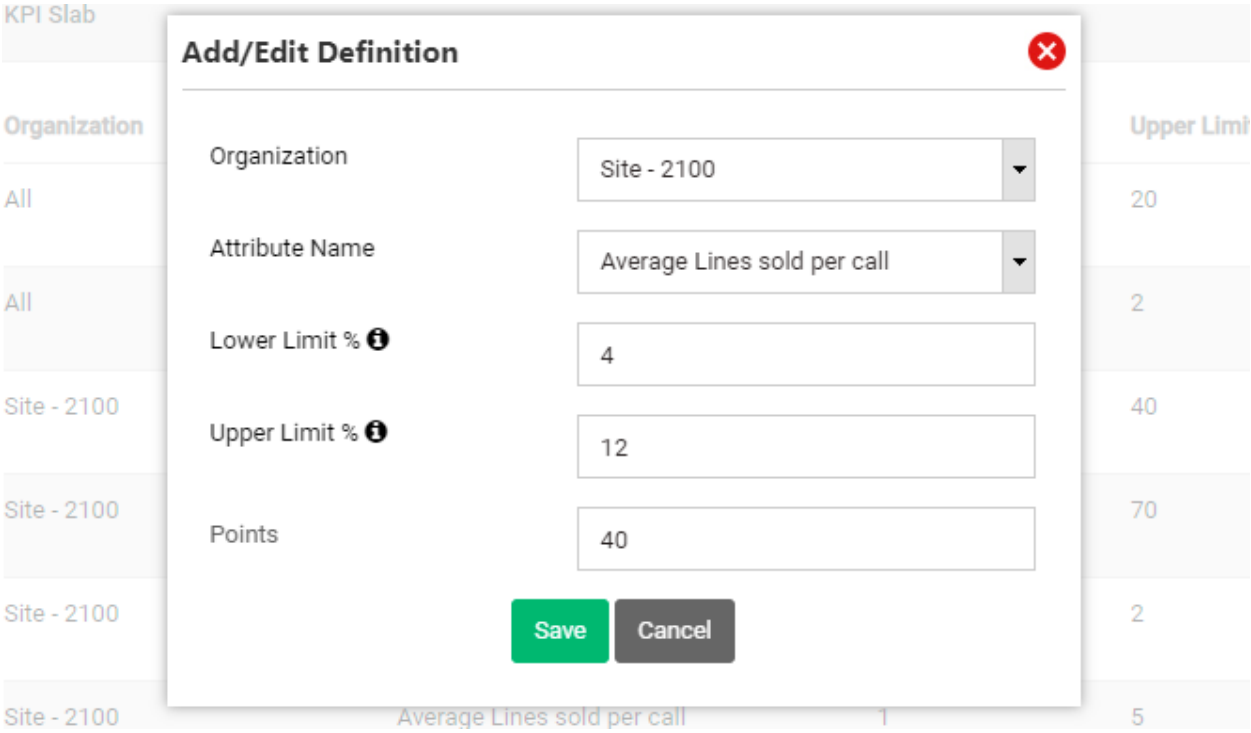
To add a new KPI, click on Add button.



Enter the KPI parameters and click on Save. The KPI parameter will be saved and a message will be displayed.

4.2.14 Van PDF Configuration

In Van PDF Configuration screen, you will be able to define the vans and the document types for which a PDF will be created and placed on to the network folder.

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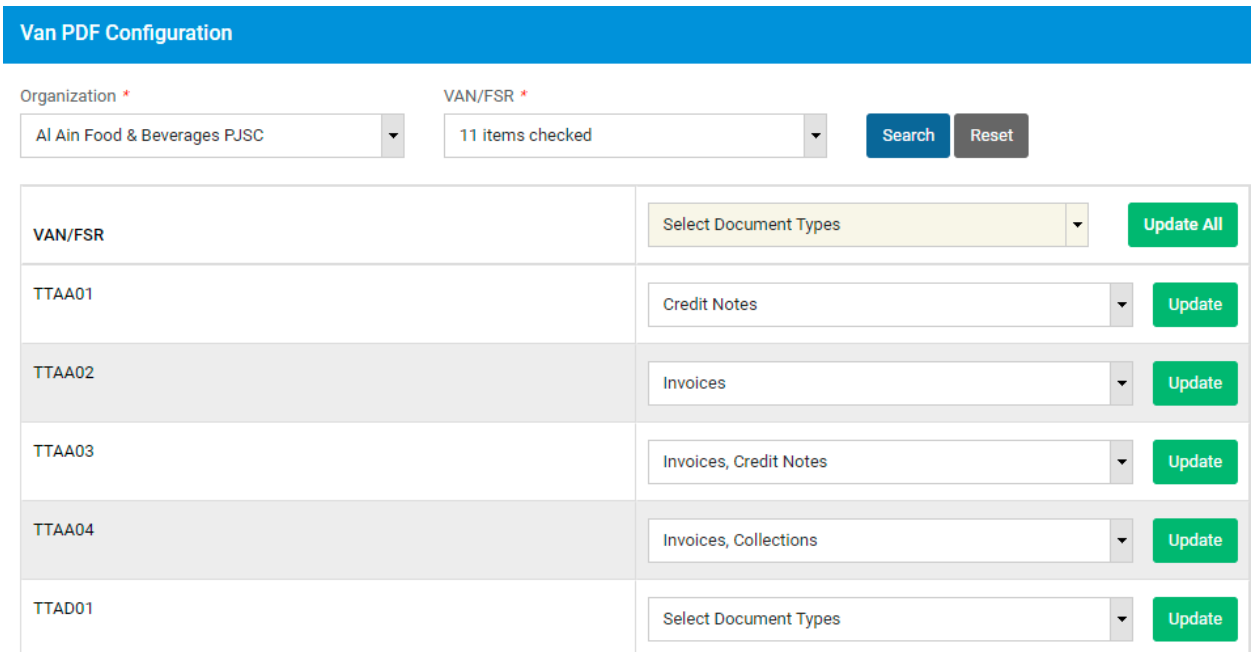
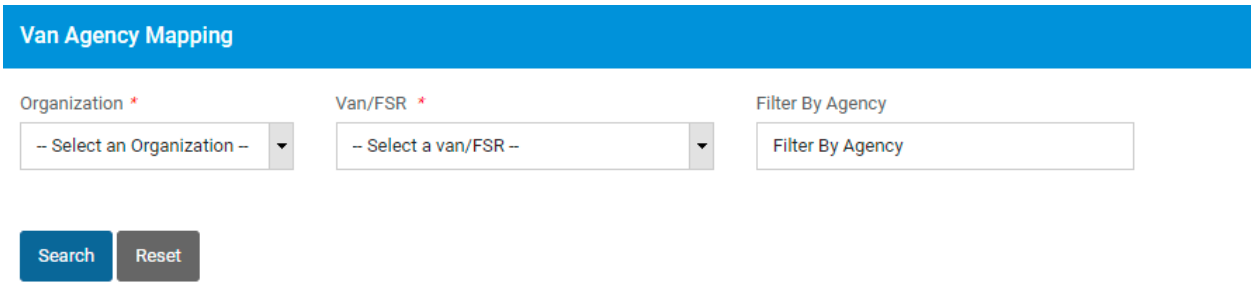


Select organization and Vans/FSR and click on Search. Their current status will be displayed. Against the document types dropdown, select the types of documents for which PDFs are to be generated. Then click on Update button to save the definition.

Note: Format of the PDF generated has to be predefined. Please get in touch with SalesWorx support for assistance.

4.2.15 Van Agency Mapping

Using Van Agency Mapping screen, you will be able to define a relationship with Vans/FSR and Product Agencies. Based on the mapping defined in the screens, selected reports will populate the vans based on the Agency that is selected during filtering.



Select an organization and FSR from the dropdown and click on Search button to view the current agencies mapped to the FSR.

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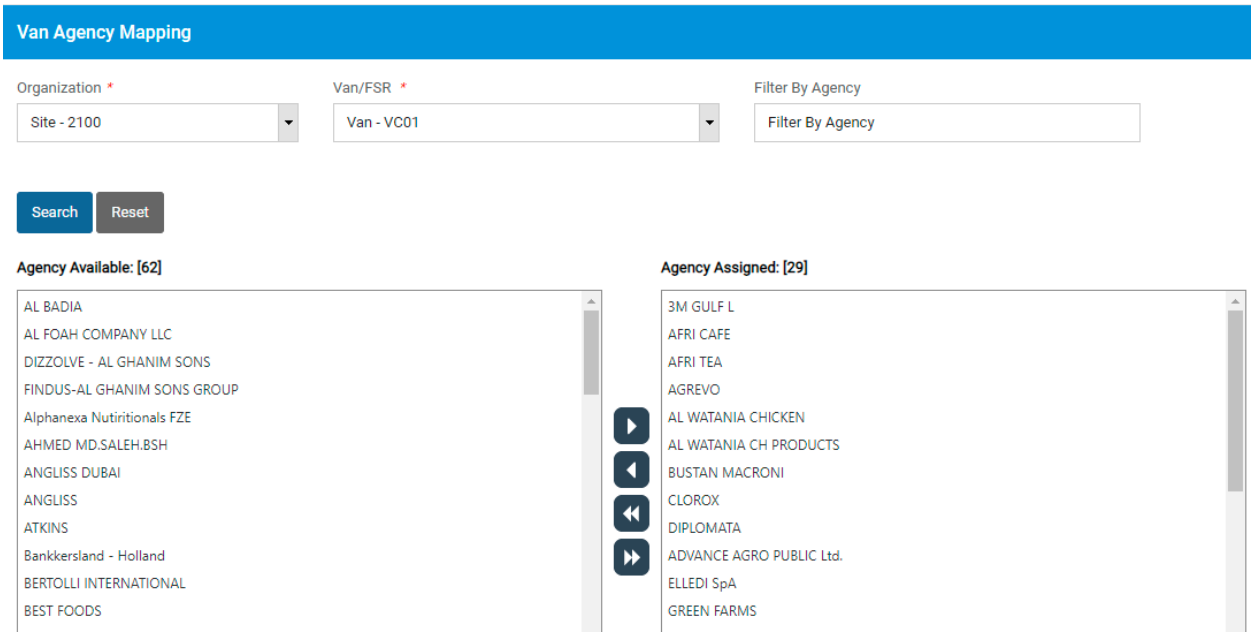

Use buttons to assign, unassign, unassign all, assign all, the agencies to the filtered FSR.

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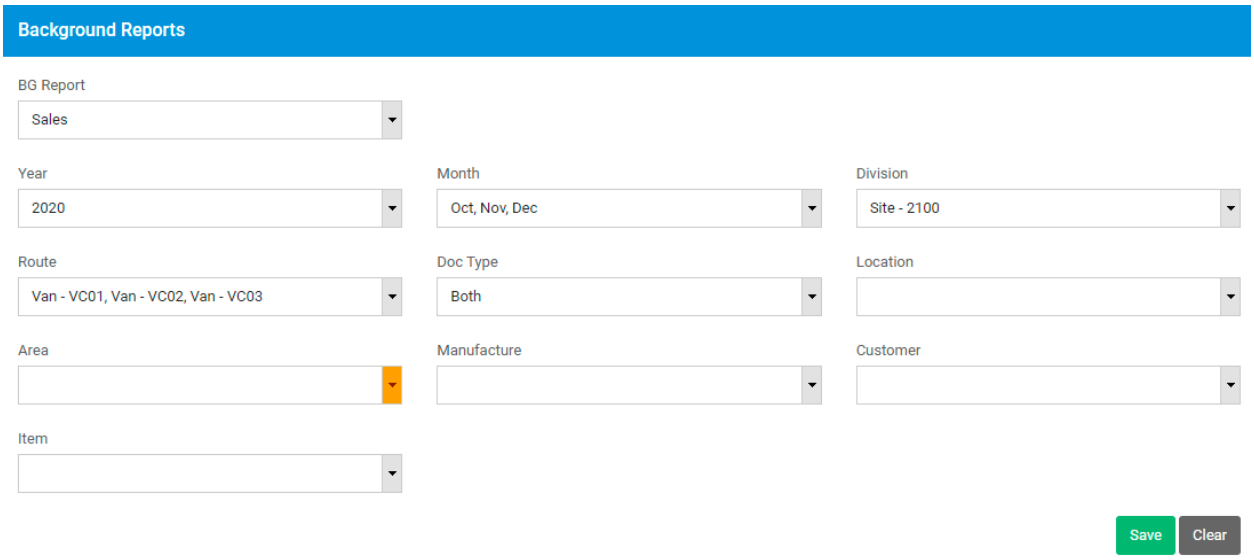
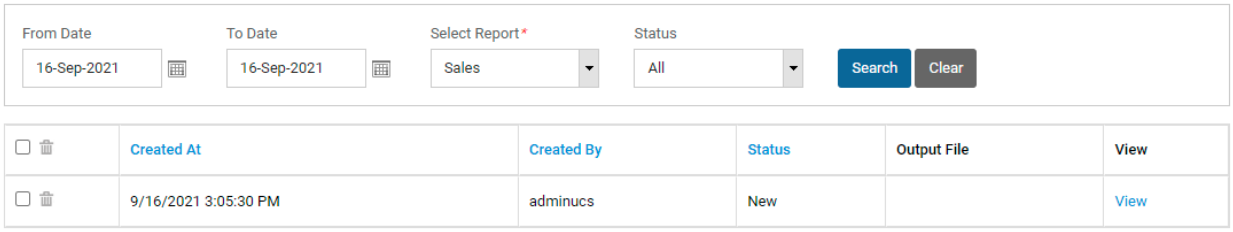
4.2.16 Manage Background Reports

In cases where a huge number of records are to be fetched as part of loading a report, such reports can be configured to run in background, an excel file will be generated, and will be available for download after the processing is completed. Such reports are known as background reports.



Select the report that you wish to generate, provide the filter criteria, and click on Save.

Once the report is generated, it will start appearing in the section at the bottom of the screen.



You can click on View button to view the filter criteria that is set. You can download the file by clicking on the link that will show up in Output File column.

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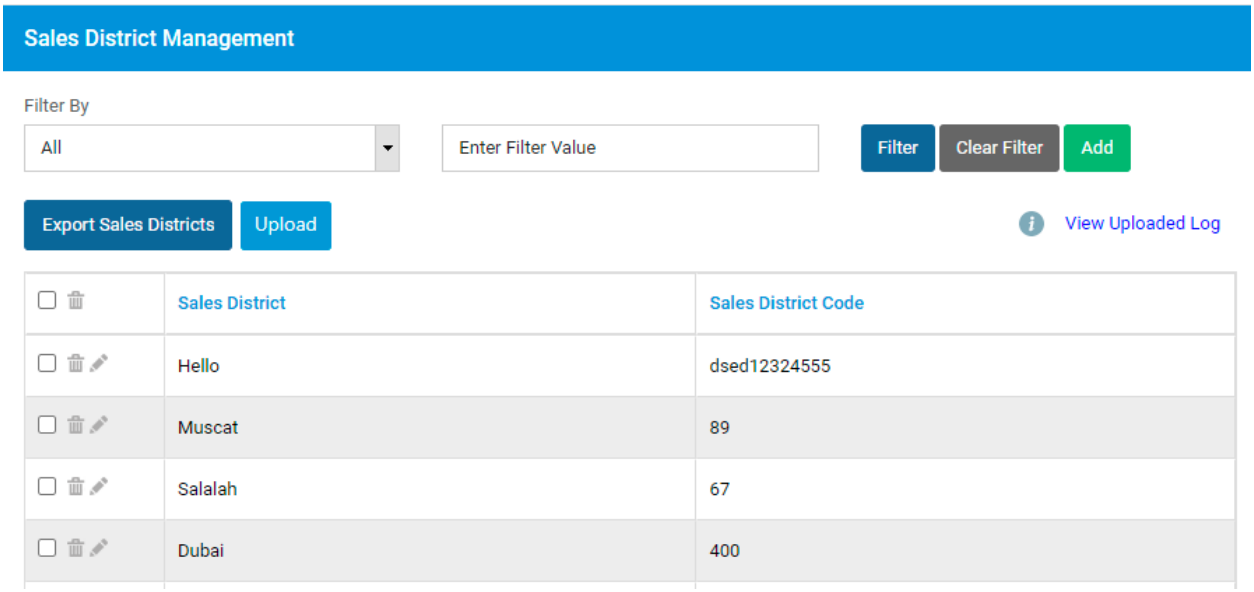
5. Customer Management

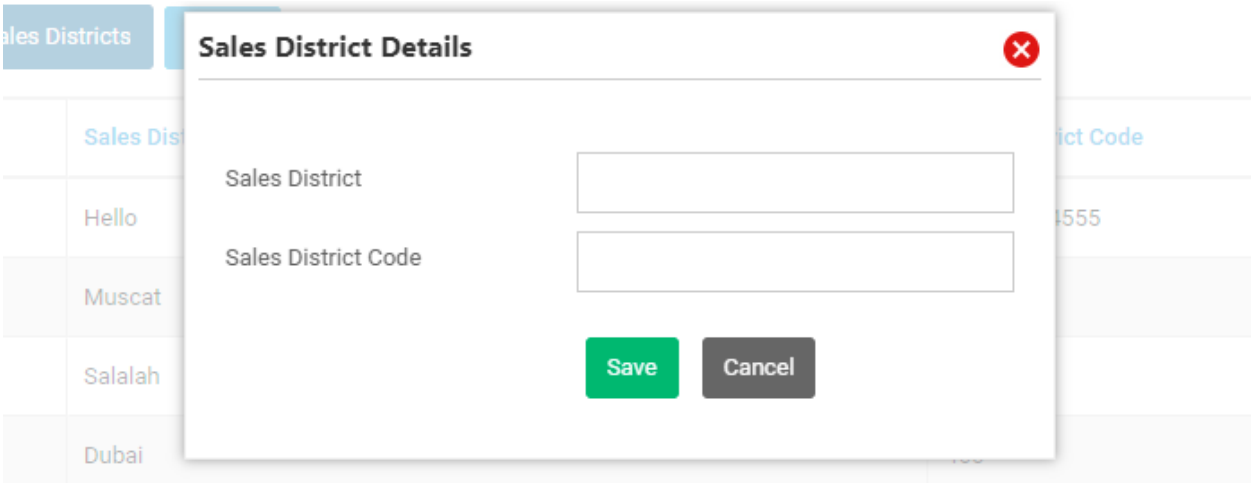
You can manage the customer related information and configuration in this section.

5.1 Manage Sales District

Using this screen, you will be able to create new Sales Districts, and manage the existing Sales Districts.



To add a new Sales District, click on Add button.



Enter name of the Sales District and Sales district code. Click on Save to save the entry.

Record will be saved and a message will be displayed. Click on edit or delete buttons against an existing sales district to delete or modify them.

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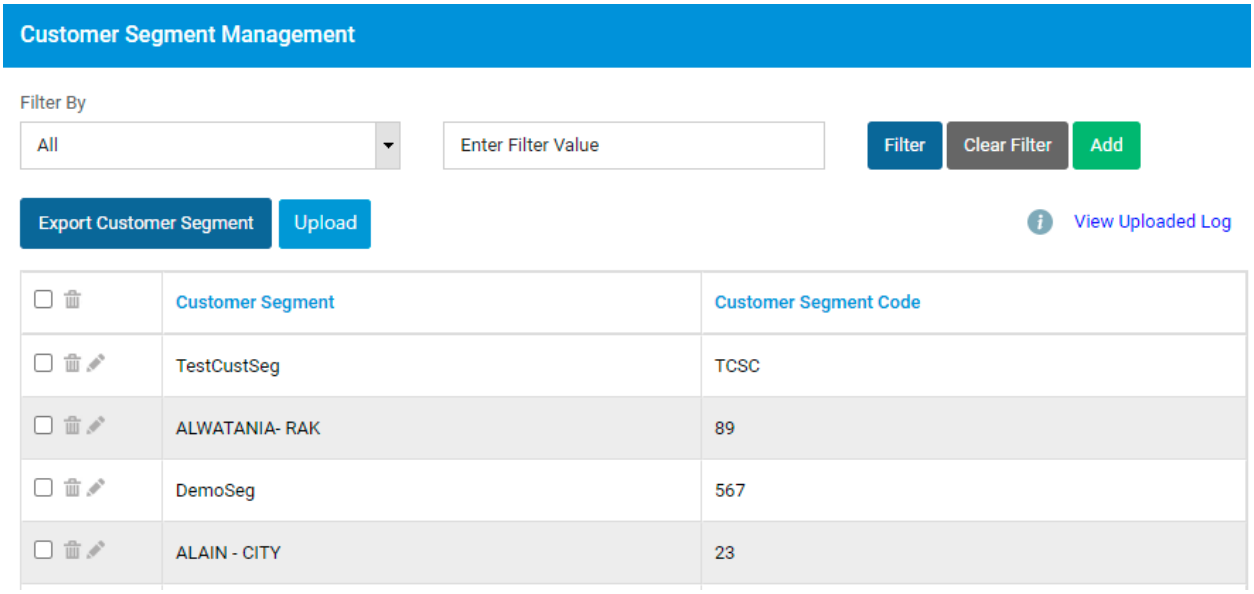
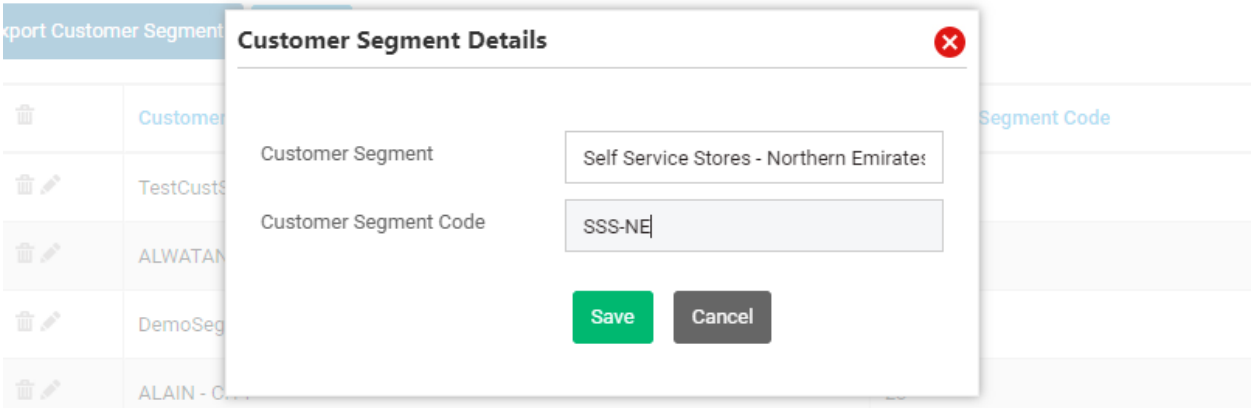
5.2 Manage Customer Segments

Using this screen, you will be able to create new Customer segments, and manage the existing customer segments.



To add a new Customer Segment, click on Add button.



Enter name of the customer segment and customer segment code. Click on Save to save the entry.

Record will be saved and a message will be displayed. Click on edit or delete buttons against an existing customer segment to delete or modify them.

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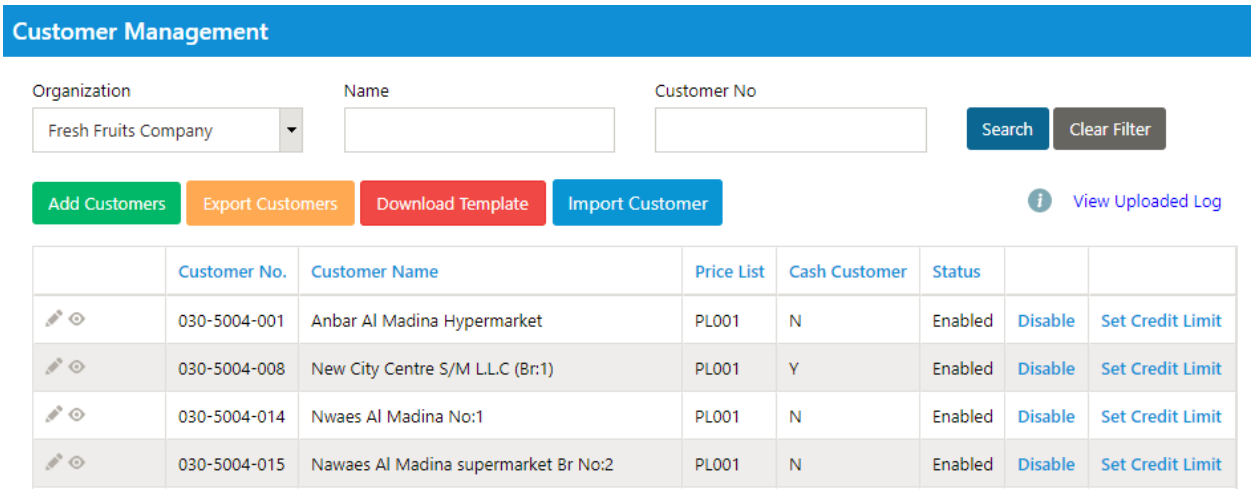
5.3 Manage Customers

You can add a new customer, modify an existing customer, or delete a customer using this screen.

You will be able to view all the customers created in the system when you open this screen.



To add a new customer, click on **Add** button. A new screen will be displayed.

In this screen, provide all the details related to the Customer account. A customer can have multiple Ship-To locations, in this screen you are creating the parent customer account.

Mandatory fields are highlighted with an asterisk. Fill in all the available information related to customer account.

Click on **Save** to save the Customer account details. Click on **Cancel** to discard the changes.

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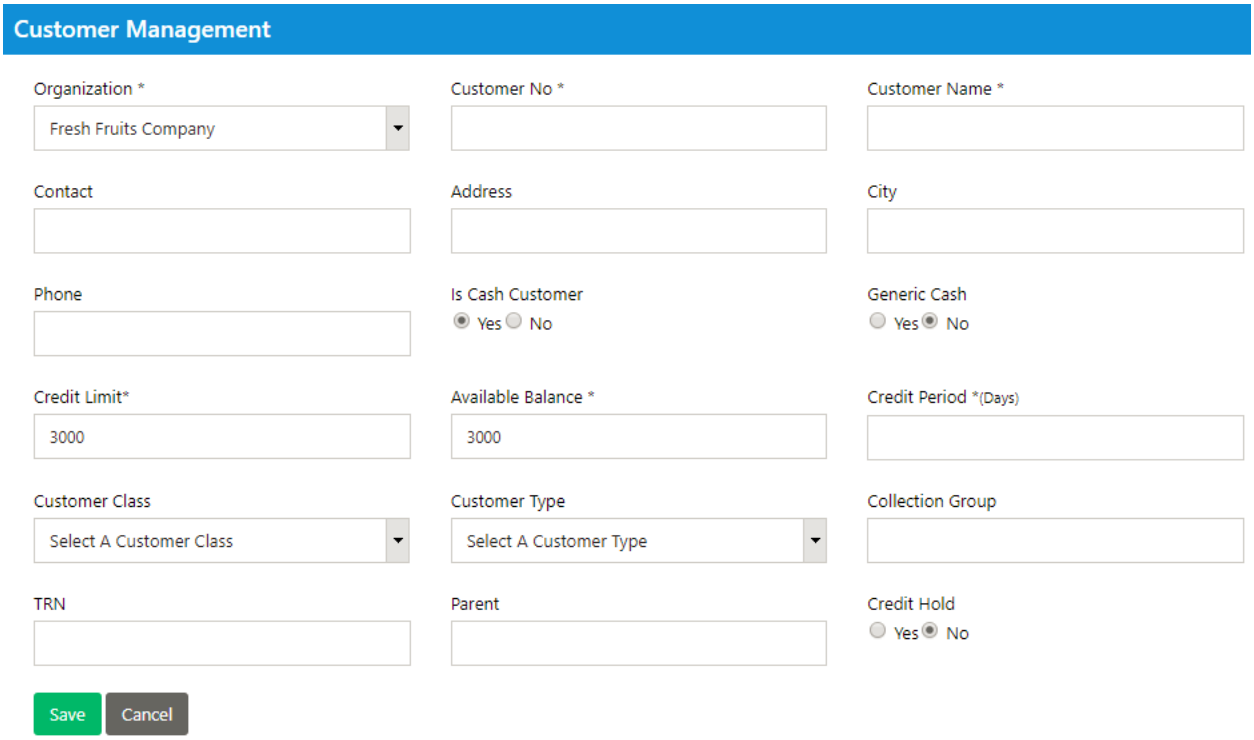
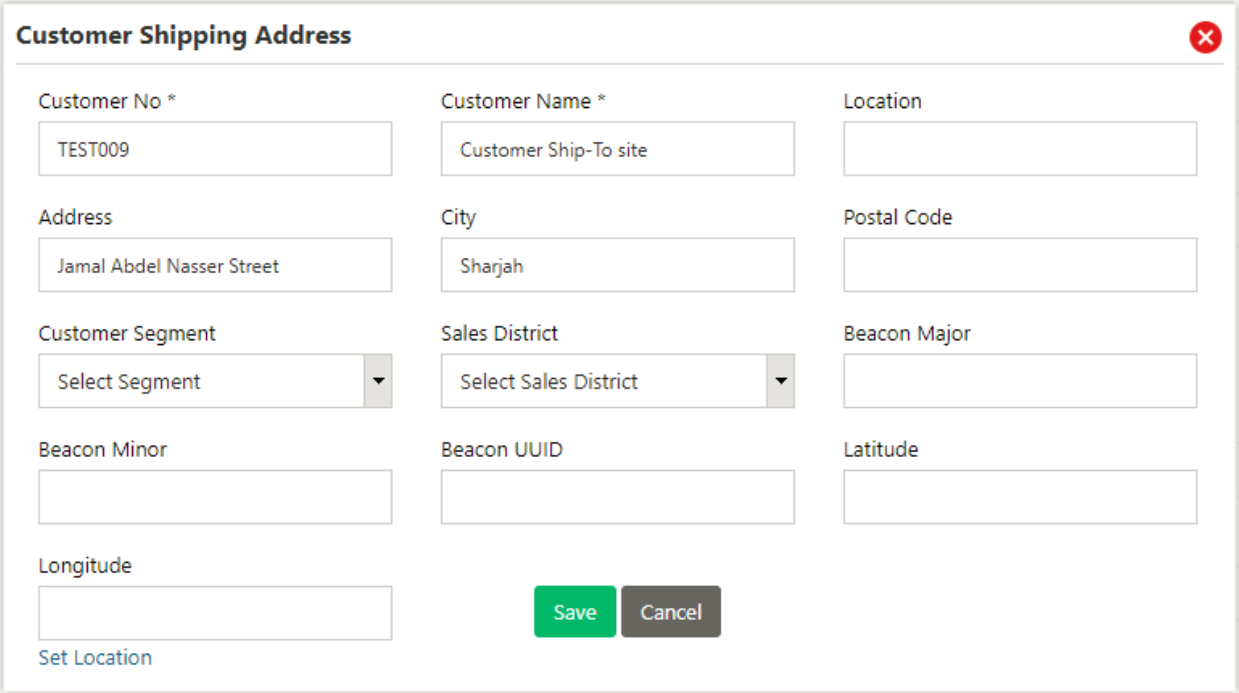


Once a customer account is saved, a new button **Add Shipping Location** will be displayed.

Click on **Add Shipping Location** button to add Customer Ship-To locations.



Click on **Set Location** link if you'd like to define the geo location of the customer ship-to location.

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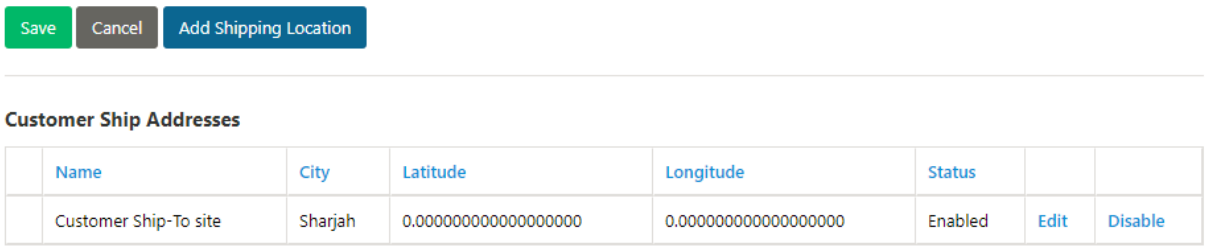
Click on **Save** to save the customer ship-to address.

You can see the newly created customer ship address listed under the parent account. You can continue the process of adding more ship addresses linked to this parent customer account.



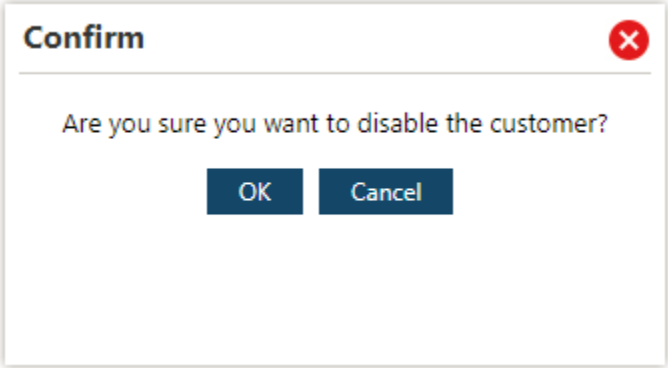
Click on **Cancel** to go back to Customer Management screen.

You can edit an existing customer by clicking on button against the customer.

To see customer details in view mode, click on button.

You can see the current status of a customer in **Status** column. In order to change the customer status, you can click on Disable/Enable link against the customer.

A confirmation will be asked, click on OK or Cancel.



To update Credit limit or Available balance of the customer, click on **Set Credit Limit** against the customer that you are updating limits for.

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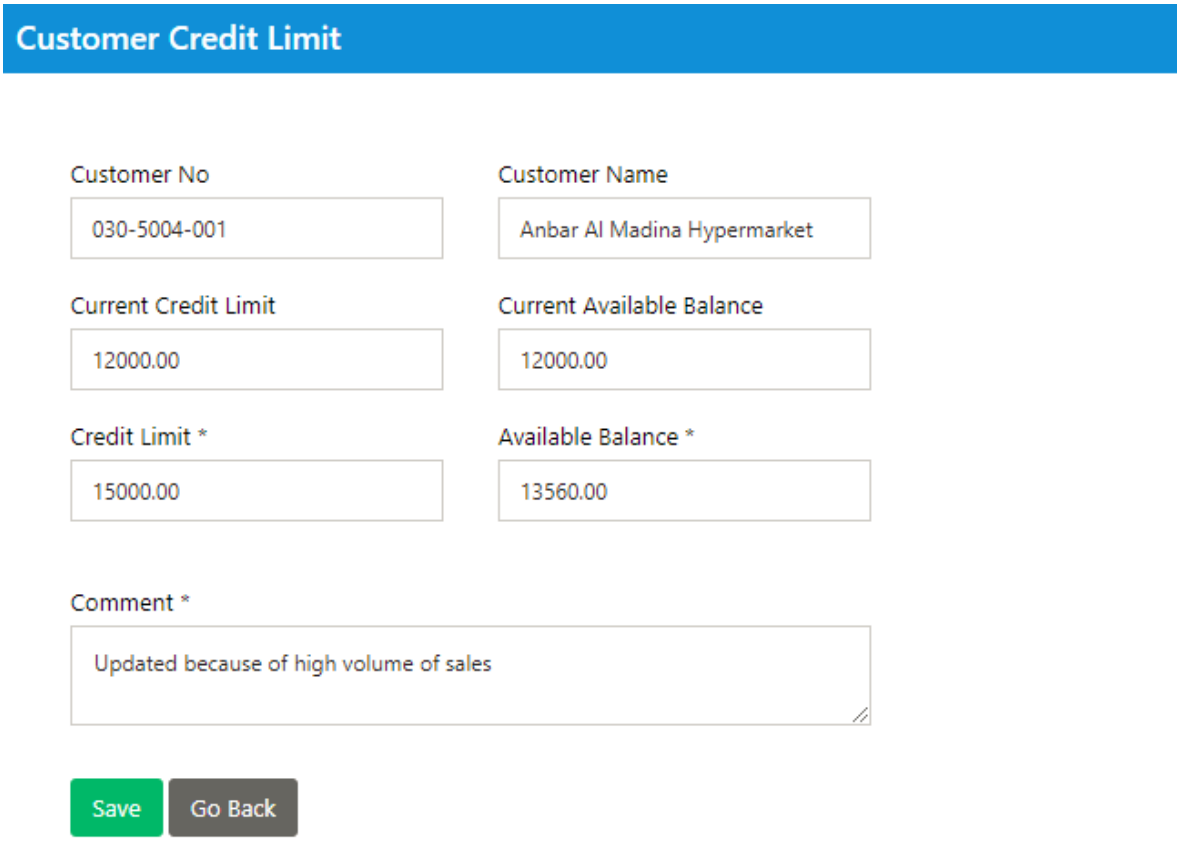
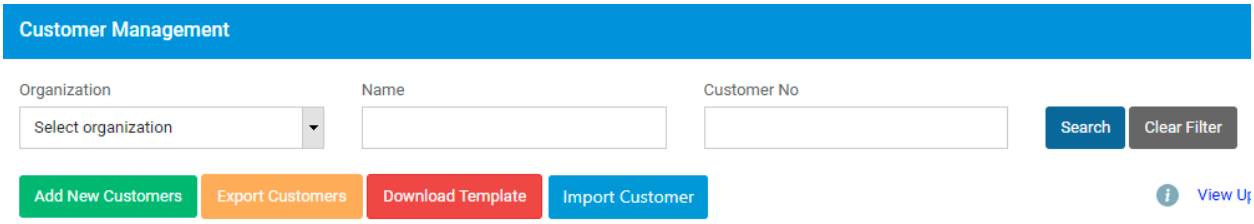


Type in the new Credit Limit and Available Balance of this customer. Mention a comment regarding the update you are performing. Then click on **Save**.

Customer credit limit and available balance will be updated.



You can import the customer master using an XLS file. Click on **Import Customer** button to import the customers. For the template of customer master, click on **Download Template**.

In order to export the customer master, click on **Export Customers** button.

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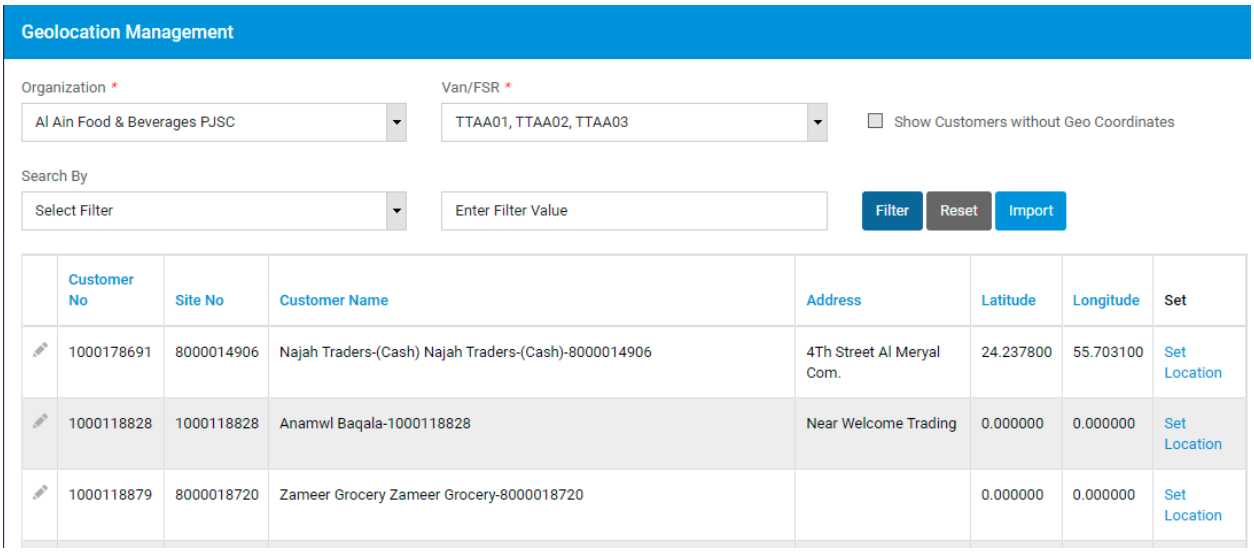
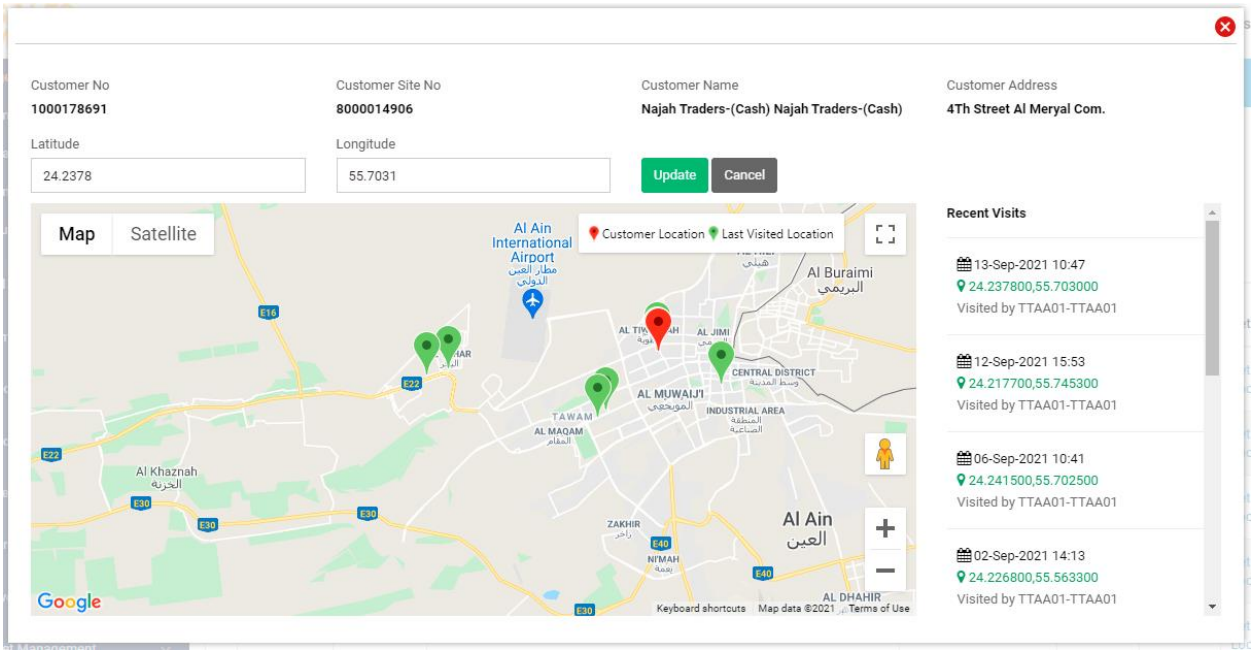
5.4 Manage Geolocation

This option is used to add, edit, delete the geolocation coordinates for the customers. It is important to have this data, since the SalesWorx Mobile will be using this data for geofencing and visit validation.



You can filter the customer list by your preference.

To set a geolocation, or to modify an already set geolocation, click on 'Set Location' button against a customer in the tabular view.



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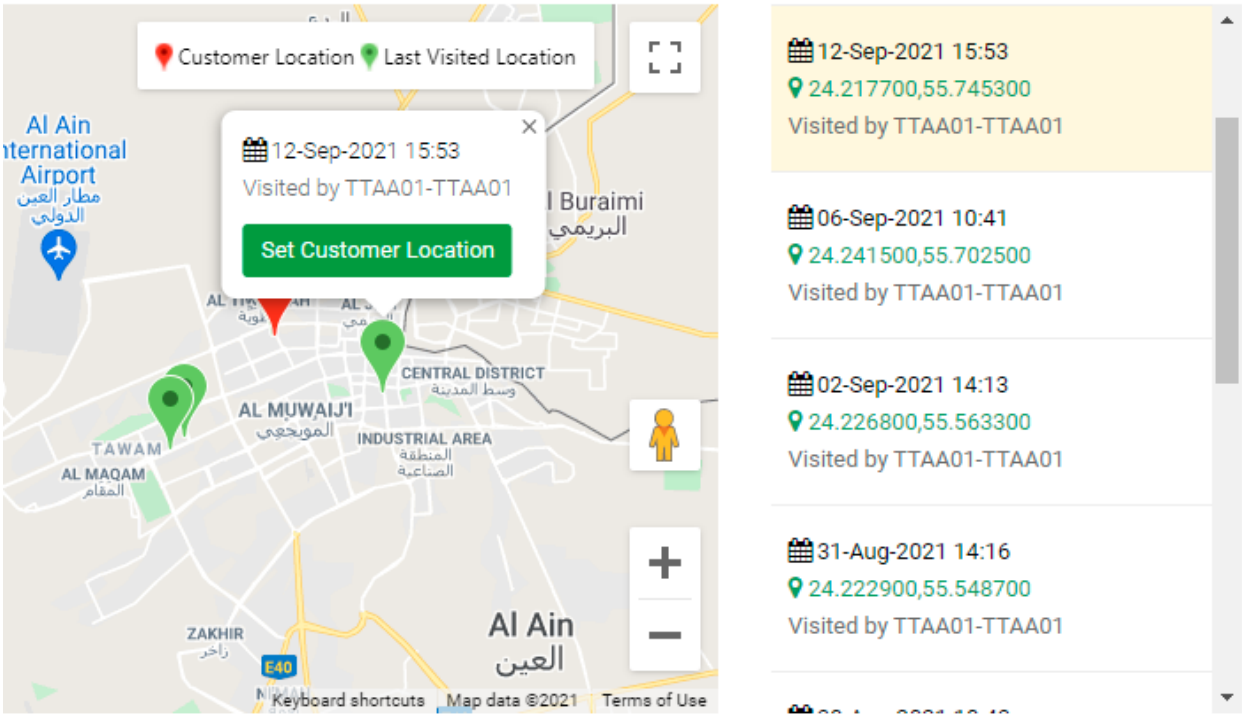
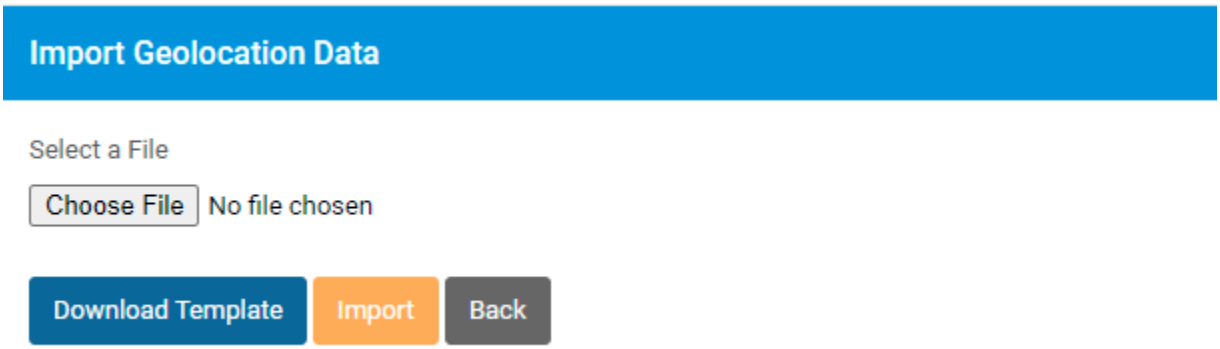
The map will be displayed. You can either enter the coordinates or pick the location by clicking on the map. Click on + to zoom in or – to zoom out. Click on Update button to save the coordinates populated on the Latitude and Longitude fields.

On the right hand side, recent visits to the selected customer will be listed. Clicking on a recent visit will trigger a pop over with an option to update the customer geolocation based on the visited location.



You can also update the location by importing a XLS file. Choose a file, and click on Import button to import.



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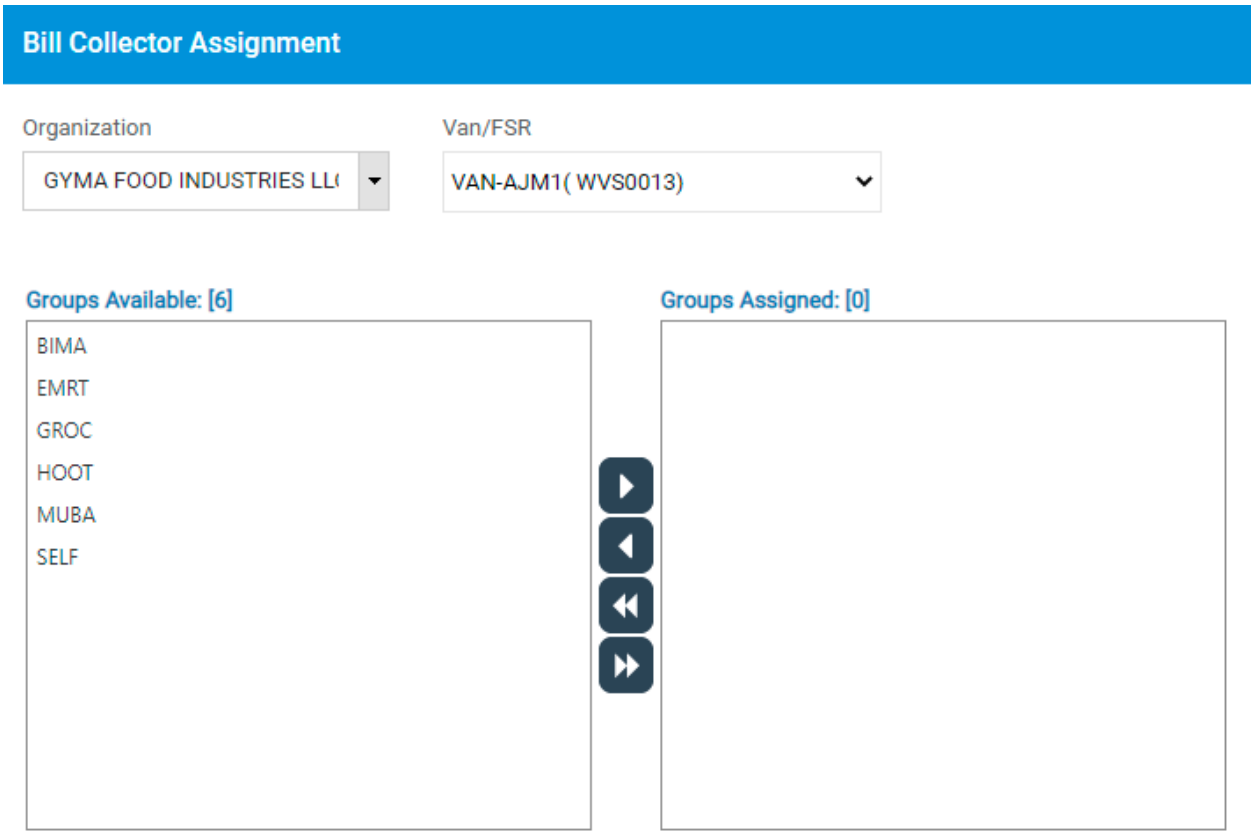
5.5 Bill Collector Assignment

Using the bill collector assignment screen, you will be able to assign an FSR to collect payments from a customer group. The customer groups are to be defined in ERP and sent to SalesWorx.



You can select an FSR from the dropdown, and the available groups and assigned groups of that FSR will be populated.

Use the buttons to assign, unassign, unassign all, and assign all.

5.6 Van Customer Assignment

Using Van Customer Assignment screen, you will be able to define which are the customers that are assigned to an FSR. You can either use the screens to define it, or you can use the import option to do this assignment.

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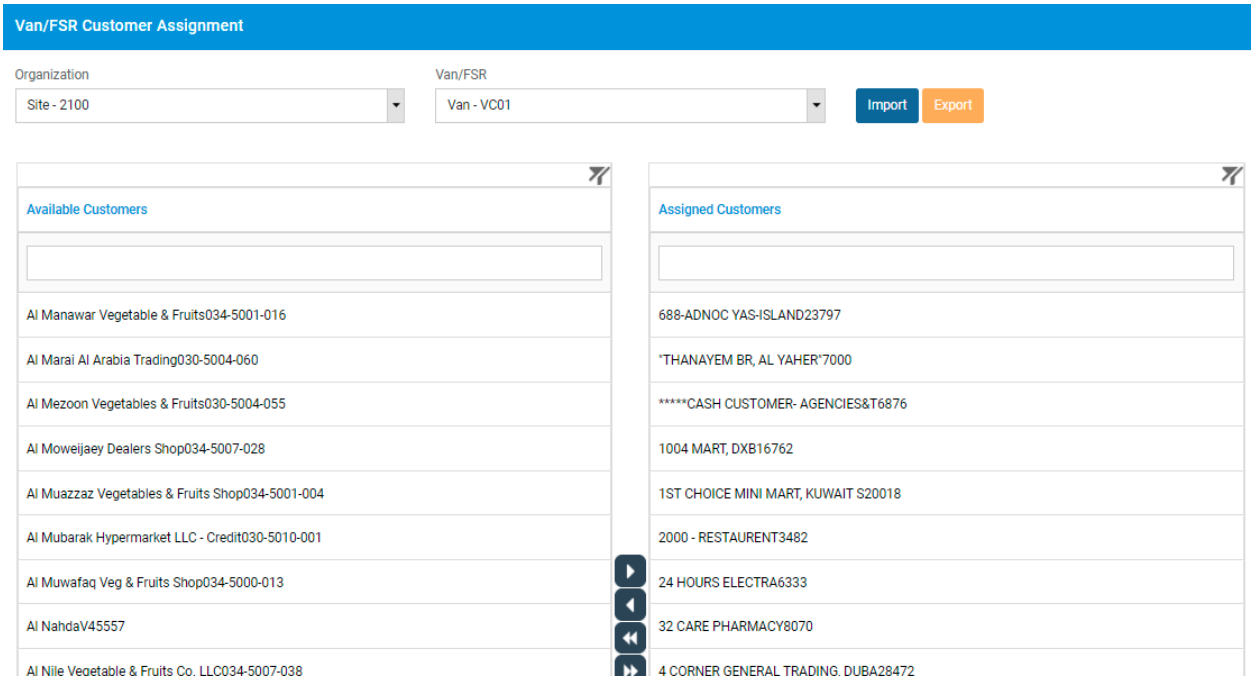
Select the organization and the FSR from the dropdown. The customers that are available and the currently assigned customers of that FSR will be populated.



Use the buttons to assign, unassign, unassign all, and to assign all.

5.7 Customer Blocking

Based on the attributes of a customer, you can define whether you would like to block a customer or not. When you select an organization, all the customers will be listed, along with their blocking rules.

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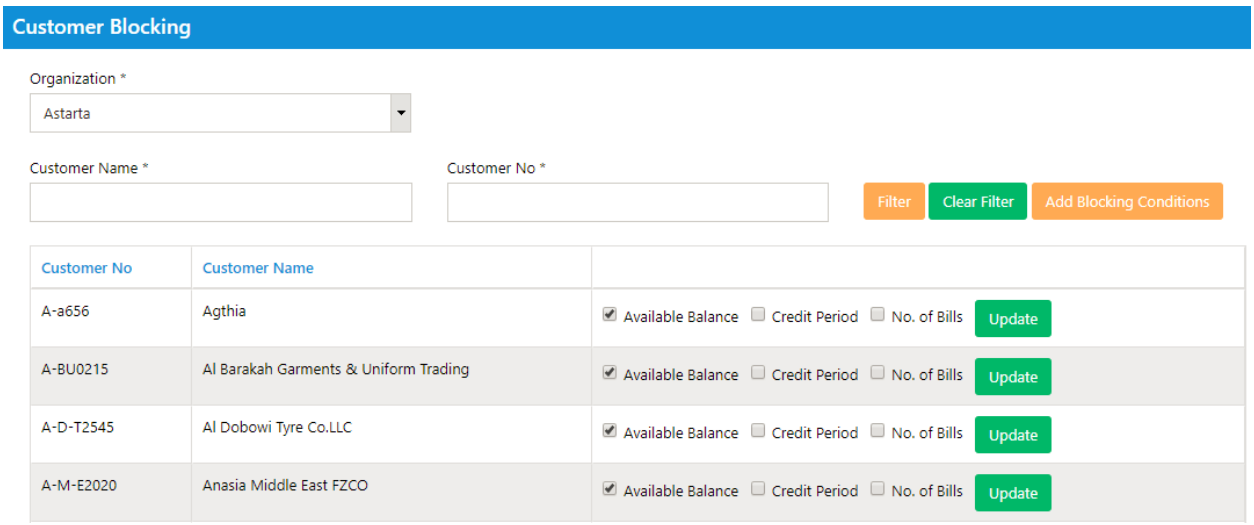


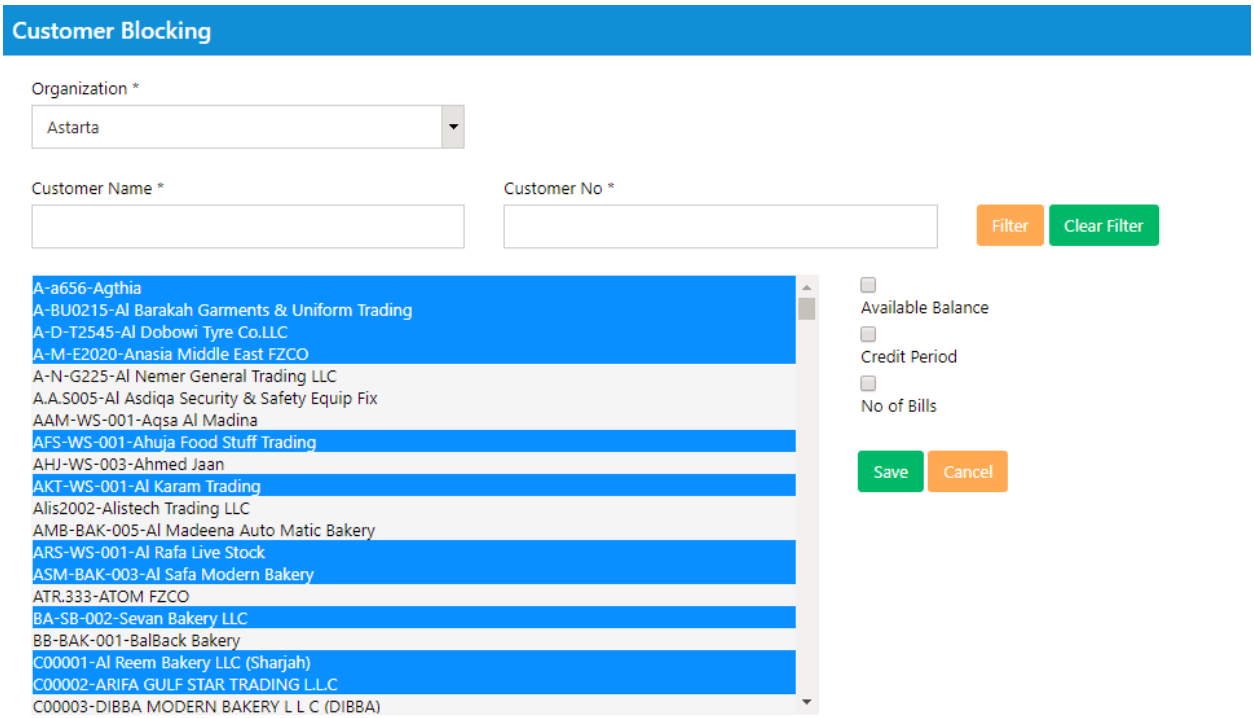
In order to modify a blocking rule, select the desired blocking rules against a customer, then click on Update. The new updated blocking rules will be applied for this customer.

If you'd like to define blocking rules for multiple customers at a time, click on **Add Blocking Conditions**.

Select Organization. All the customers will be displayed in Multi Selection box.

Select the customers you wish to set blocking rules to.

You can use **Ctrl + Click** to select multiple customers at a time.



Enable the check boxes against the blocking rules you wish to apply.

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Then click on **Save**. Blocking conditions will be updated accordingly.

5.8 Customer PDF Configuration

In Customer PDF Configuration, you can specify the customers for which you wish to generate a PDF copy of documents to be created and placed in a shared folder.

The FSRs for which PDF will be generated is defined in **Main -> Organization Settings -> Van PDF Configuration**.

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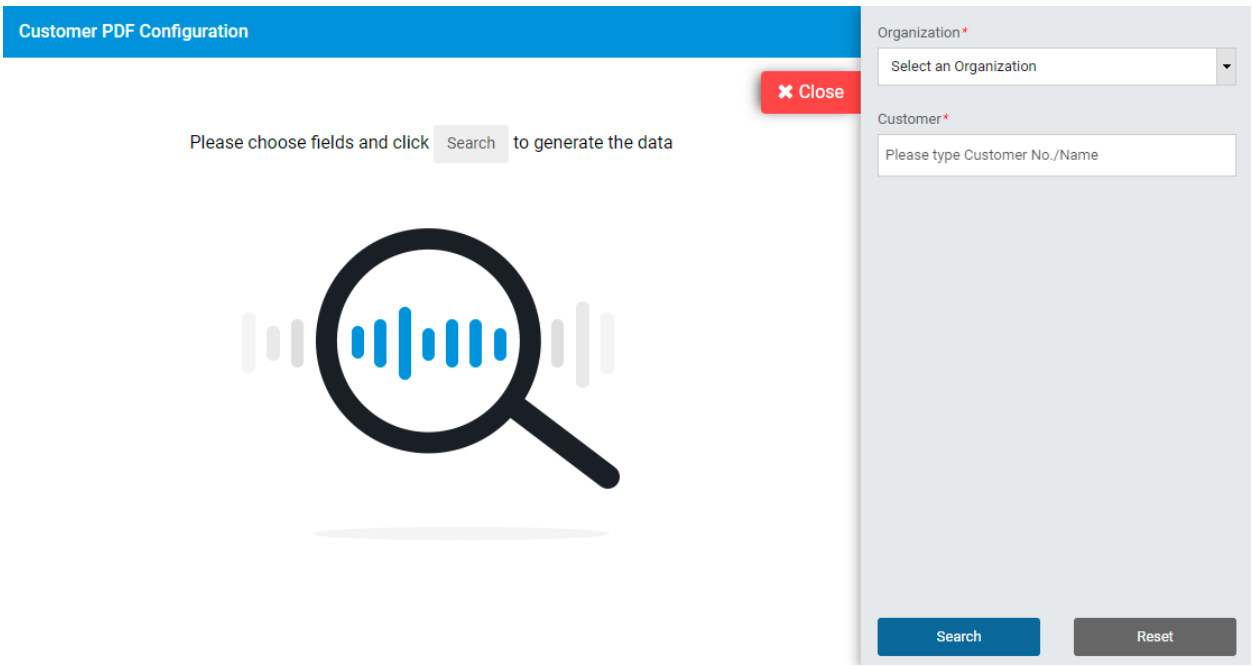
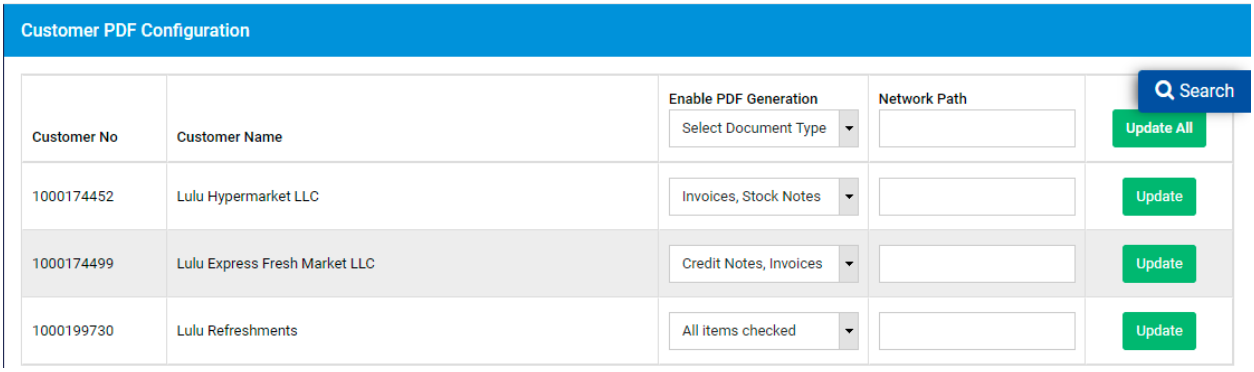


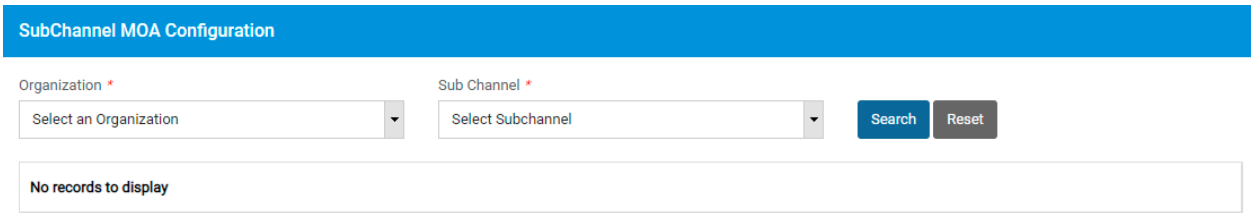
Select an organization and a customer, and then click on Search.



Select the types of documents for which PDF is to be generated against each customer. Specify a Network Path. Click on the Update button to save the configuration.

5.9 Sub Channel MOA Configuration

This screen is used to define minimum order amount at a subchannel level. If there is no minimum order amount defined at a customer level, sub channel level configuration will be considered.



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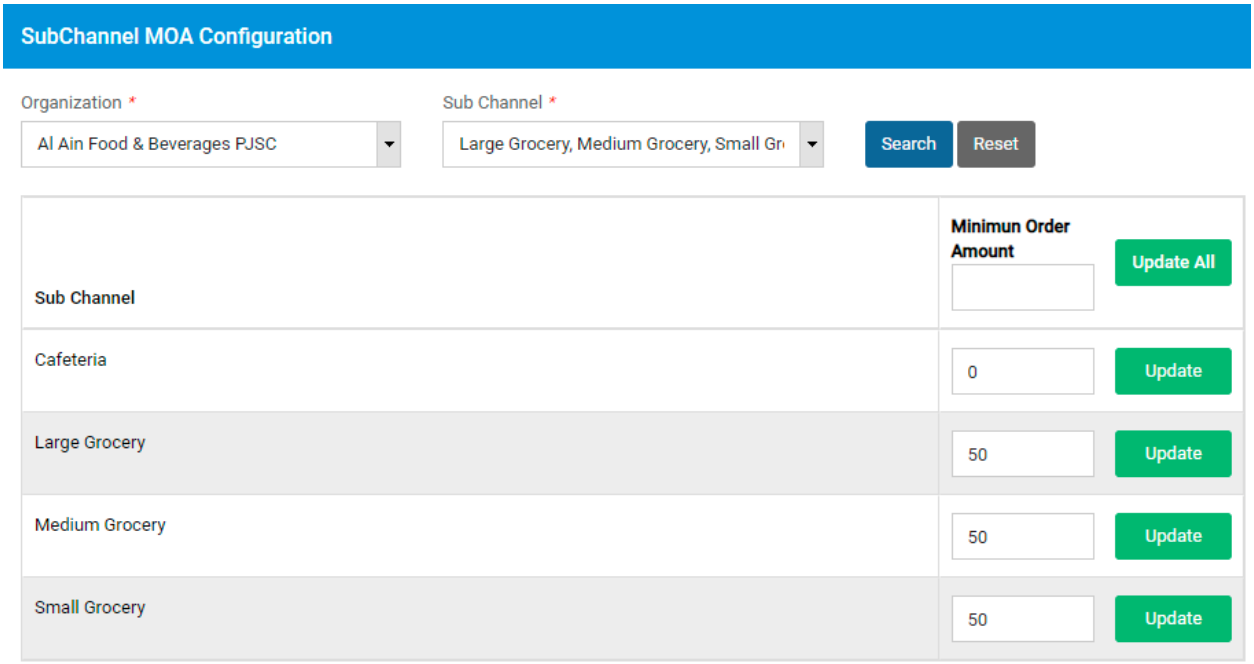
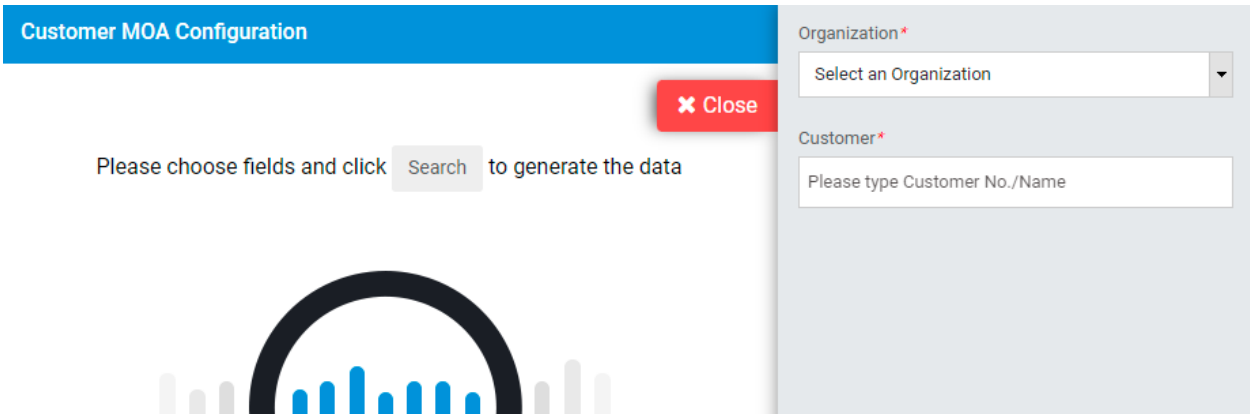
Select an organization and Sub Channel. Click on Search to populate the defined sub channels' minimum order amount.



Enter the amount against the sub channel in Minimum order amount column. Click on Update button to set the amount.

5.10 Customer MOA Configuration

This screen is used to define minimum order amount at a customer level.



Select an organization and customers. Click on Search to show the current minimum order defined for the selected customers.

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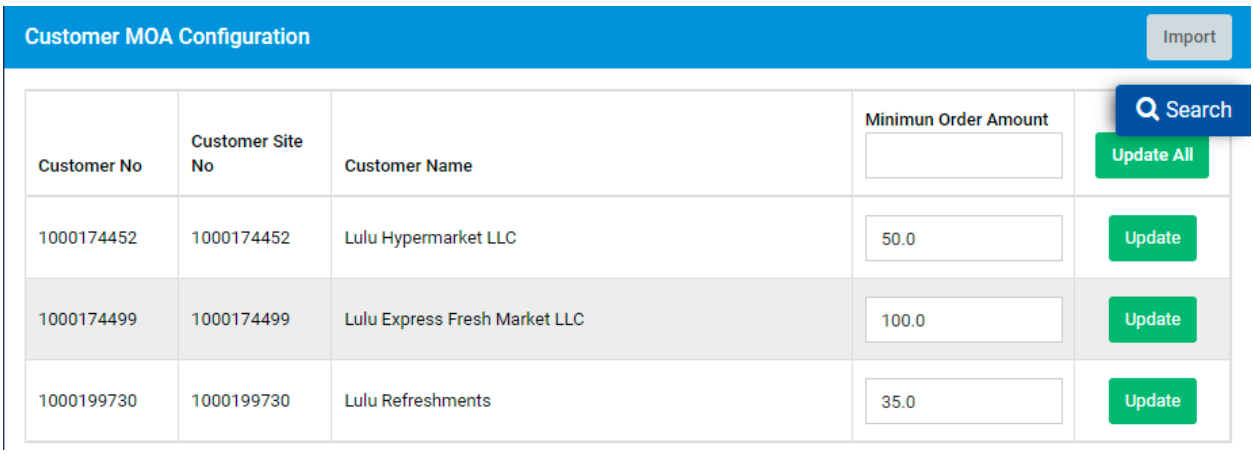
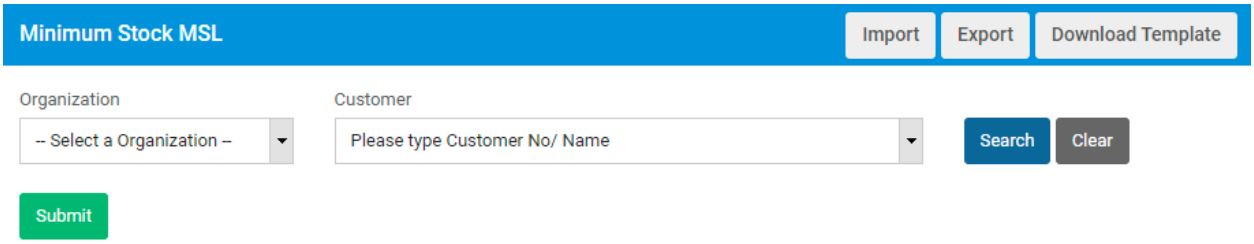


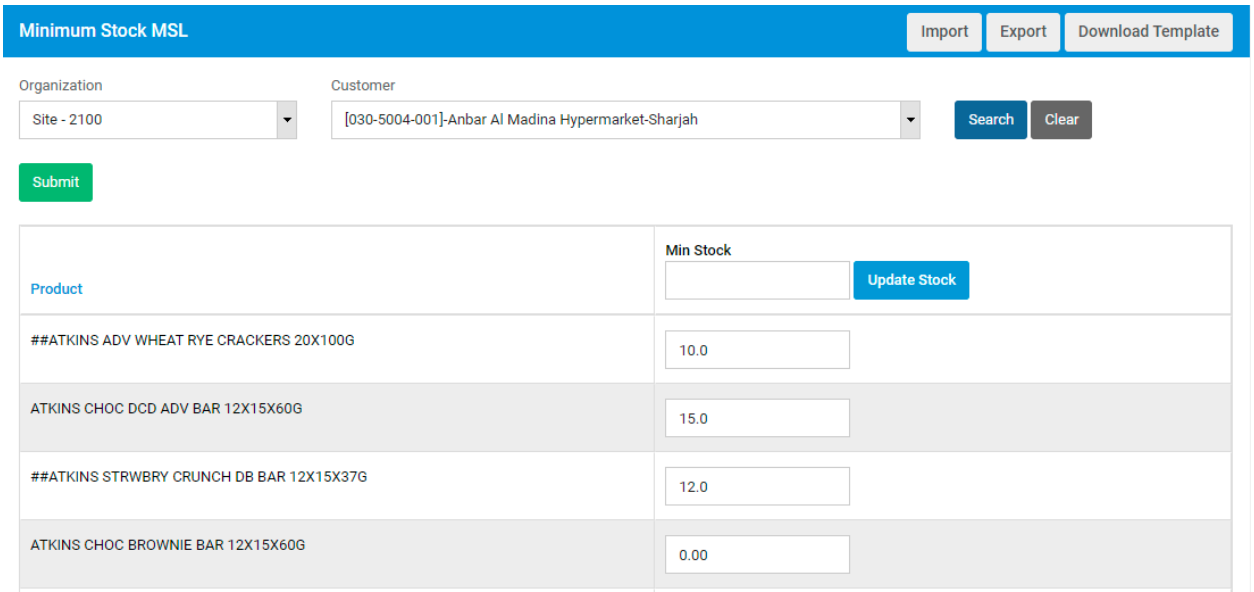
Enter the minimum order amount for the customer in Minimum Order Amount column and then click on Update button. Minimum order amount will be set for that customer.

5.11 Minimum Stock For MSL

Using this screen, you will be able to define a minimum stock level for MSL items at a customer location.



Select an Organization and a customer, then click on Search button. Current minimum stock that is defined for the customer will be displayed.



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If any changes are to be made in minimum stock level, enter the quantity and click on Update Stock. The entered information will be saved.

6. Call Planning

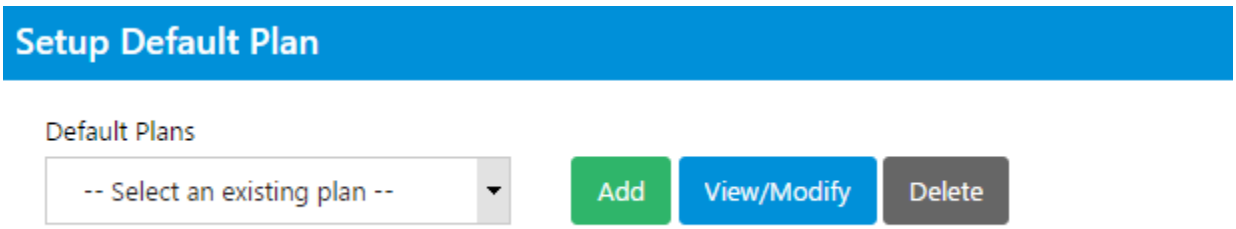
In this section, you can manage different aspects of daily FSR routes and the communication between FSRs and other users.

6.1 Route Management

You can create default route plans, create or edit route plans, approve route plans, copy route plans, manage holidays etc. using this module.

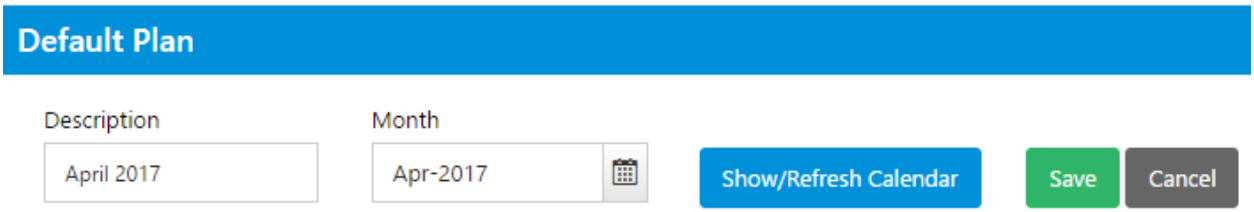
6.1.1 Create default plan.

A default plan is a basic structure, over which the visits will be assigned.



Only one default plan can be created for a month.

To create a default plan, click on 'Add'.



Enter a description and select a month.

It is better to provide a description which describes the month you are creating default plan for. This will avoid confusion while creating route plans.

Click on 'Show/Refresh Calendar'.

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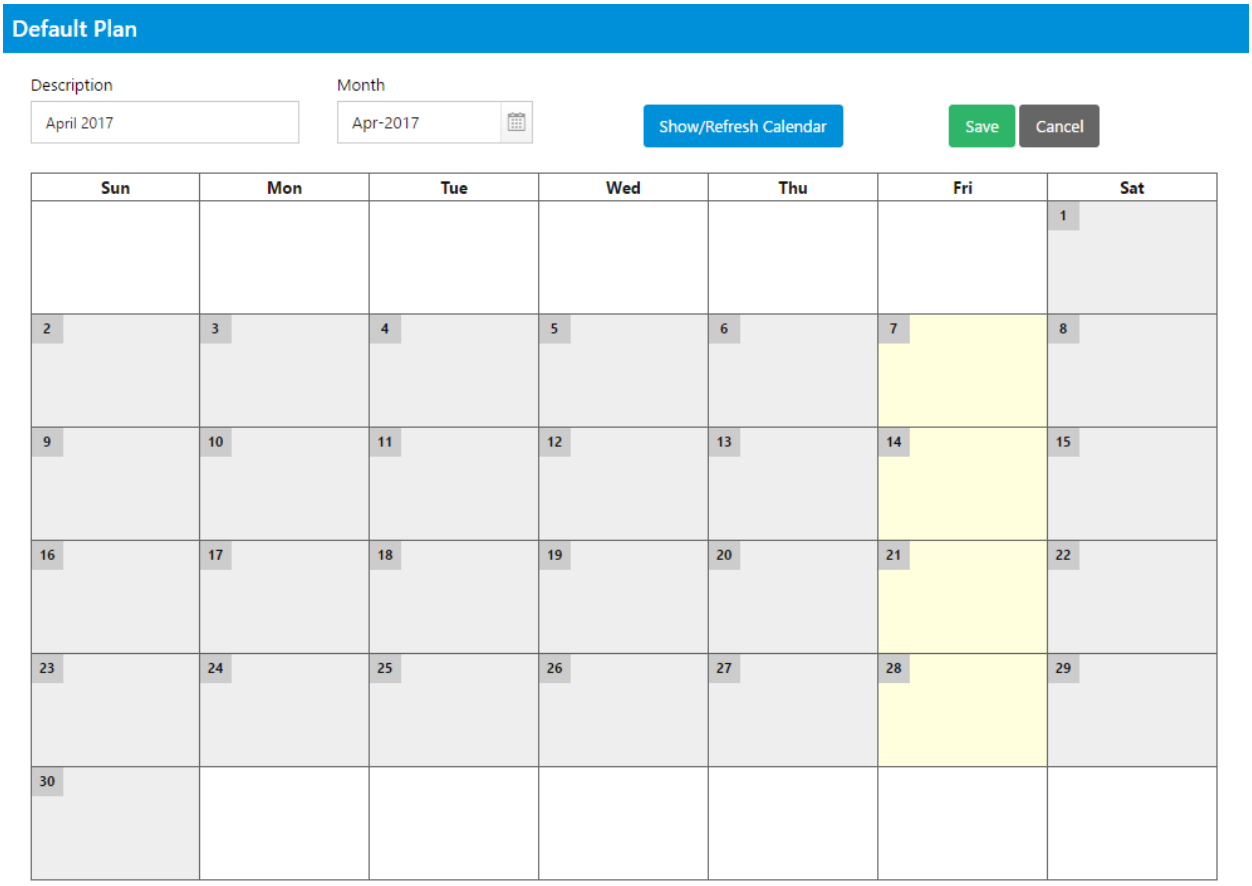
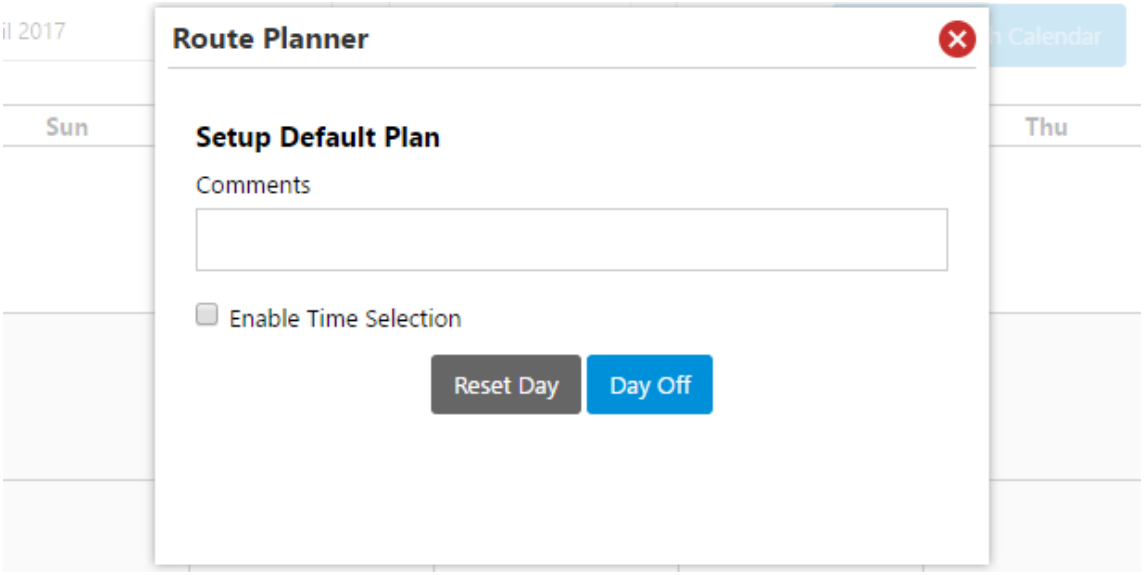


The default plan will be displayed.

Clicking on a calendar cell, you will get option to set a day as Day Off. Click on Reset Day to clear the Day Offs set.



Click on 'Save' to save the default plan.

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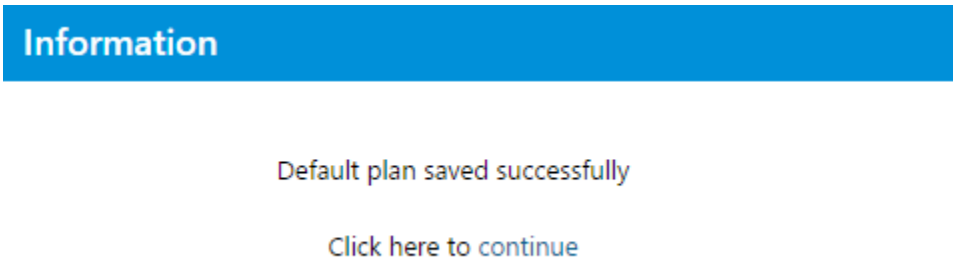
You will receive a confirmation.



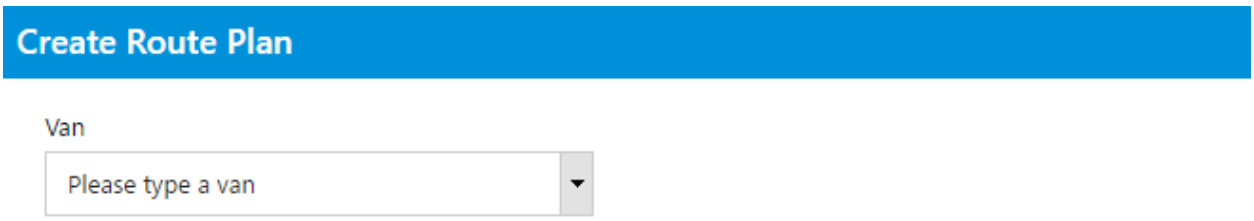
You can modify a default plan by clicking on 'View/Modify' button.

You can delete a default plan by clicking on 'Delete' button. You cannot delete a default plan if the default plan is being used by any route plans.

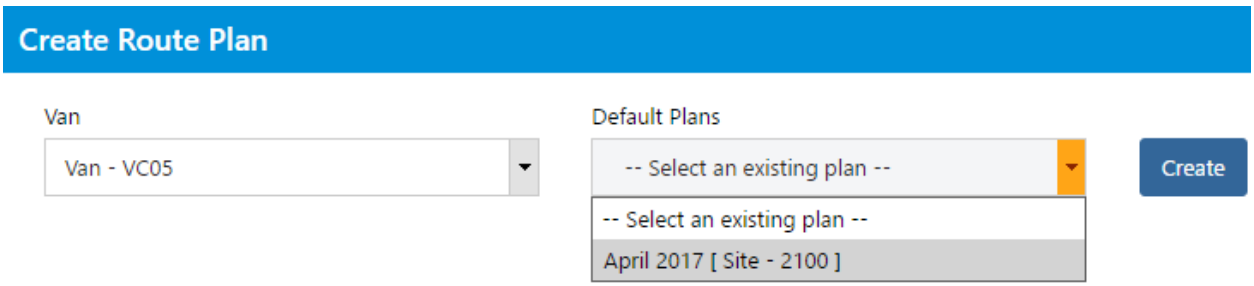
6.1.2 Create Route Plan

You can create route plan for the vans using this module. You can create route plan only once for a van and for a default plan. But you can edit or delete the route plans whenever you wish.

To create a new route plan, select a Van.



Select the default plan.



Then click on 'Create'.

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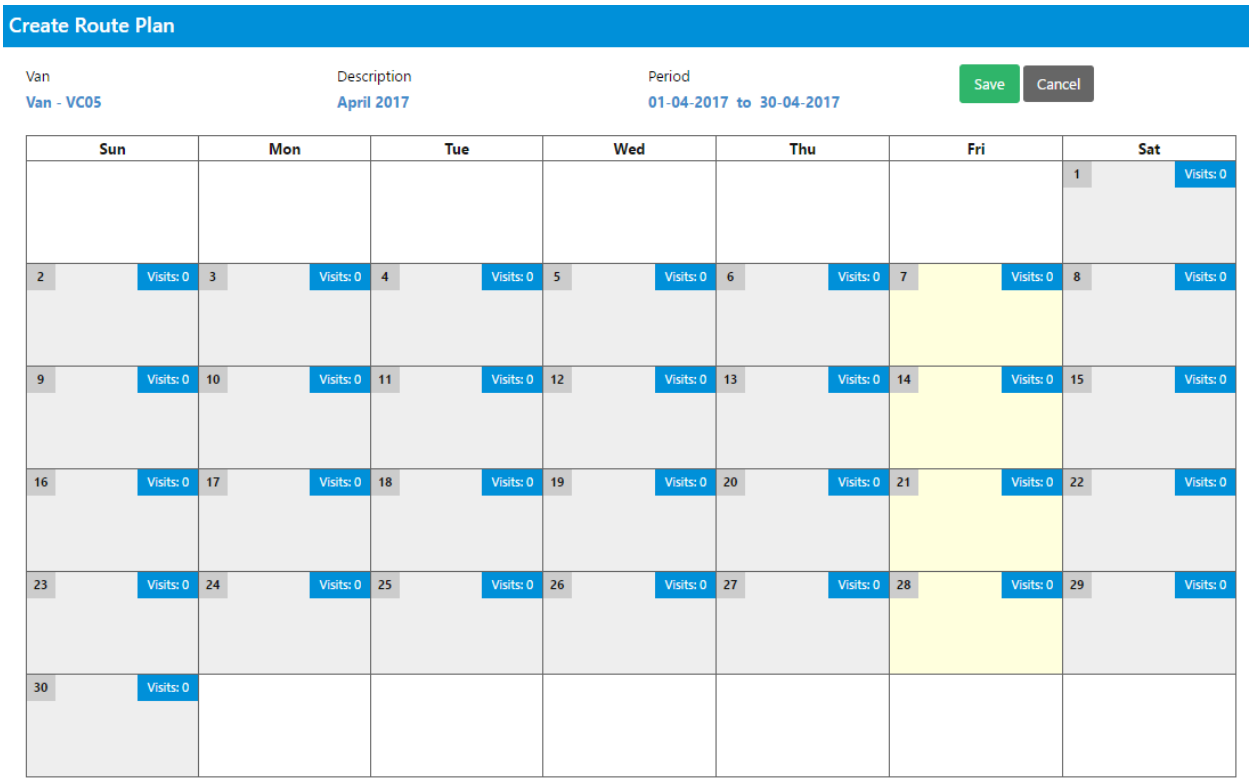
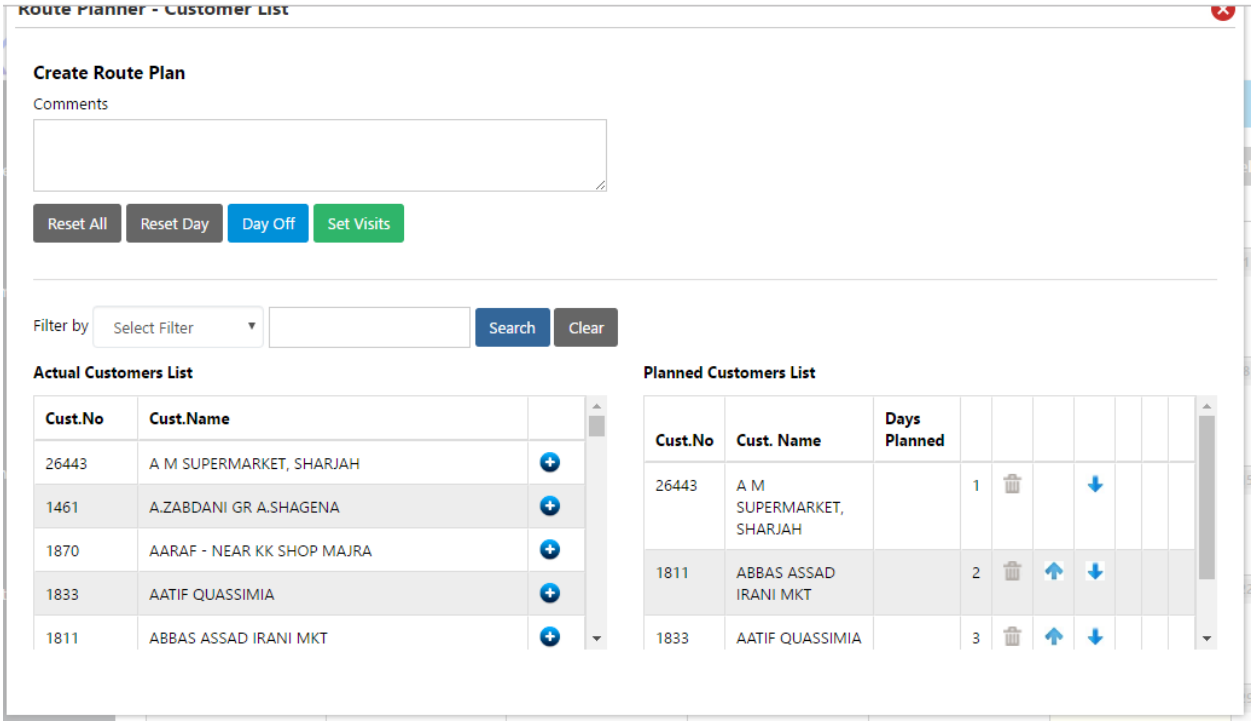
You will be presented with the calendar of the month.



Click on a cell, and you will receive options to add visits.



You can see Actual Customers List on the left side, and Planned Customers List on the right side.

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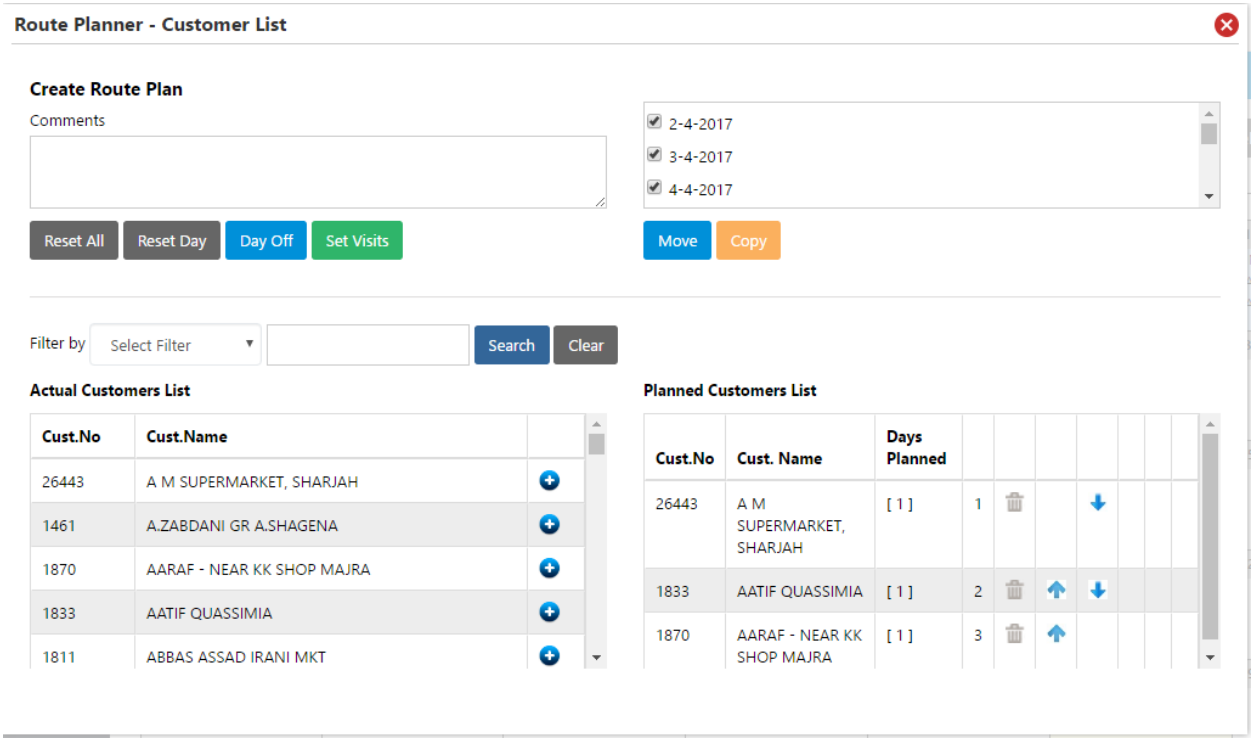
Click on '+' button to add a customer to Planned Customers List.

To remove a customer from the Planned Customers List, click on Delete icon.

To rearrange customers in Planned Customers List, click on up or down arrows.

After the required customers are added to the list, click on "Set Visits' to save the changes. Click on 'Day Off' to set the day as Off.

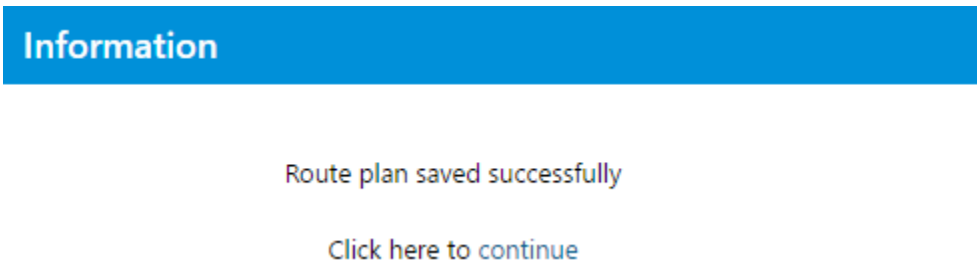
Repeat the process to add visits to all working days.



To copy or move visits of a day to another, open the cell with source data. Check the target date/dates. Then click on Move or Copy.

The target dates will be set with the source visit details.

Click on 'Save' in Create Route Plan page to save the route plan.



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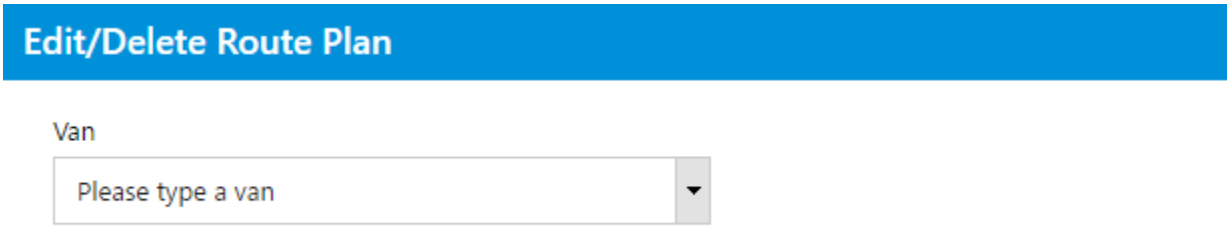
6.1.3 Edit/Delete Route Plan

You can edit or delete a previously created route plan in this module.

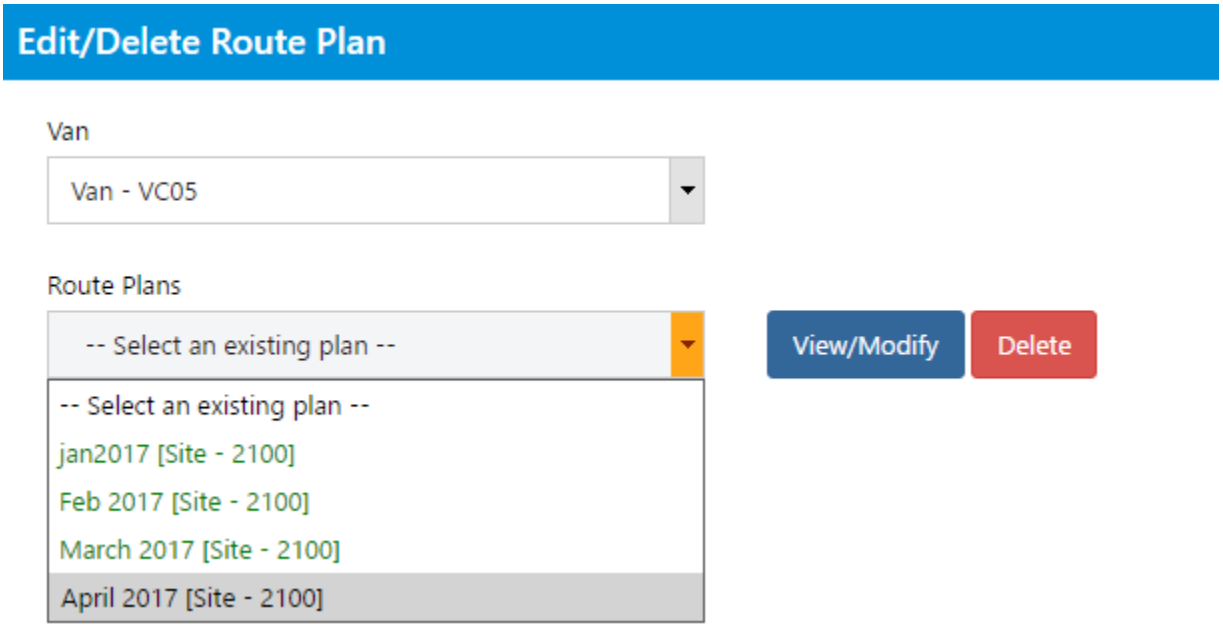


To edit a route plan, select a van from the dropdown.

Select the route plan from dropdown.

To delete a route plan, click on Delete.

To edit, click on 'View/Modify'.



The Edit Route Plan page will be displayed.

It is similar to the Create Route Plan. Make the changes you wish to make.

Then click on 'Update'.

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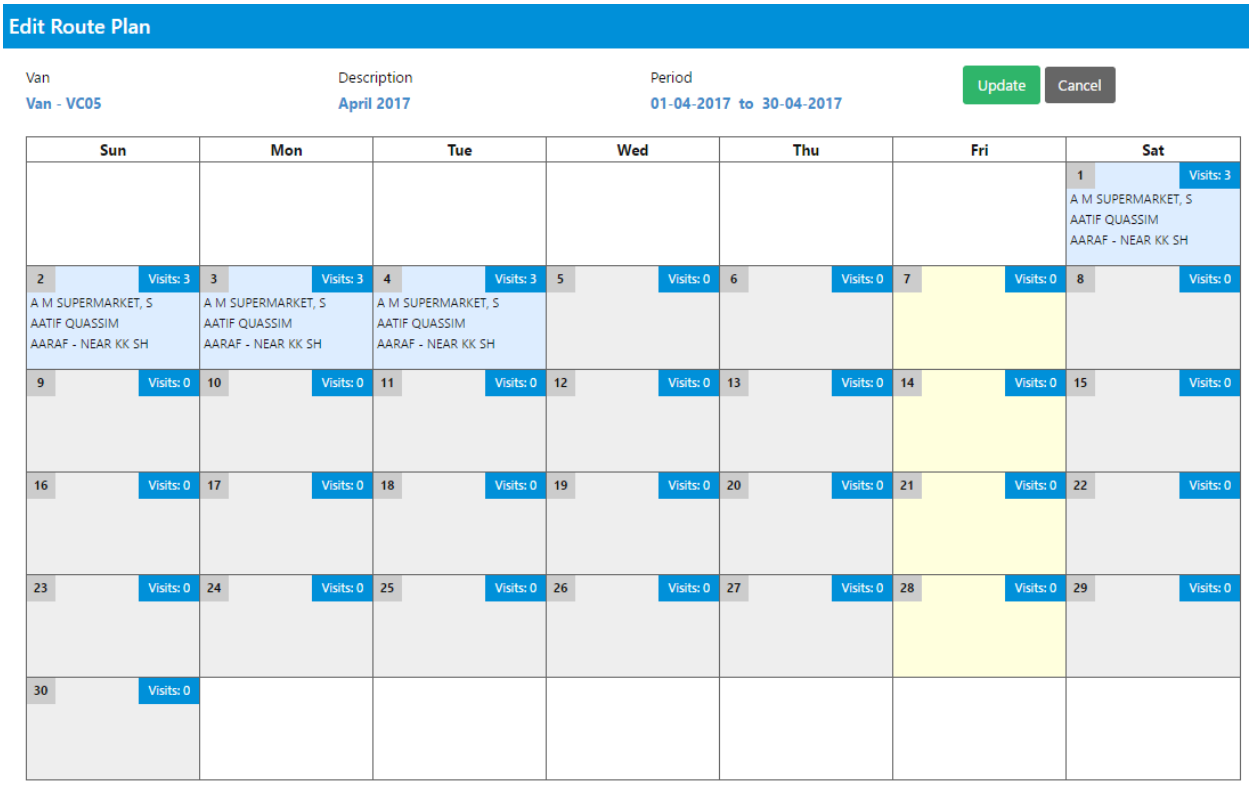

The route plan will be updated.

6.1.4 Import Route Plan

You can import route plan using excel file. The contents in excel file need to be in the format of the template provided to you.

To import, choose a file. Then click on 'Import'.

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6.1.5 Approve Route Plan

The route plans which are newly created, or updated needs to be approved by the administrators or supervisors.

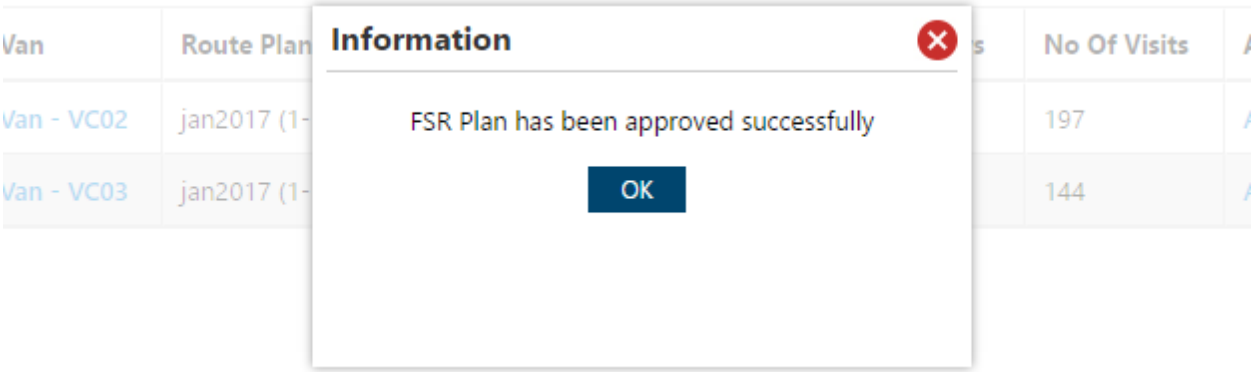
The FSR can use the route plan only after it has been approved.

Plans for Approval

Van	Route Plan	Site	Working Days	No Of Visits	Approval
Van - VC02	jan2017 (1-1-2017 -> 31-1-2017)	Site - 2100	27	197	Approve
Van - VC03	jan2017 (1-1-2017 -> 31-1-2017)	Site - 2100	27	144	Approve
Van - VC05	April 2017 (1-4-2017 -> 30-4-2017)	Site - 2100	26	12	Approve

To approve a route plan, click on 'Approve' link in the table.

You will receive an acknowledgement 'FSR Plan has been approved successfully'.



6.1.6 Review Route Plan

In Review Route Plan screen you will be able to see the statuses of the route plan that were created.

Review Route Plan

Filter By: All | Enter Filter Value | Select Month | Filter | Reset

FSR	Route Plan	Site	Working Days	No Of Visits	Status	View	Export
Van - VC03	October - 2021 (1-10-2021 -> 31-10-2021)	Site - 2100	26	5	Approved	View	Export
Van - VC04	October - 2021 (1-10-2021 -> 31-10-2021)	Site - 2100	26	4	Not Approved	View	Export

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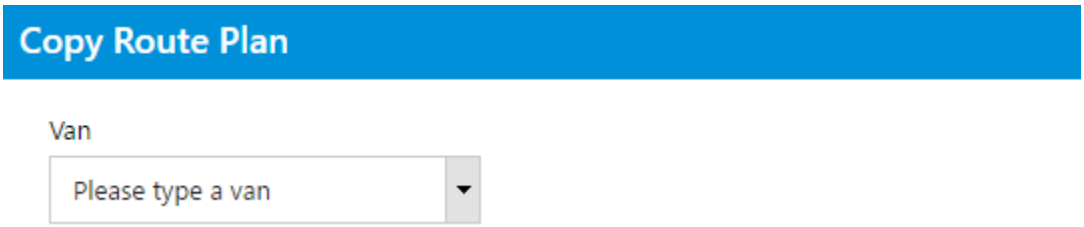
Click on the FSR name to view the route plan in calendar mode.

To view the visit statuses against the planned visits, click on button in View column.

To export the route plan to an excel file, you can click on Export button.

6.1.7 Copy Route Plan

You can copy a van's route plan of a month to another month using this option.

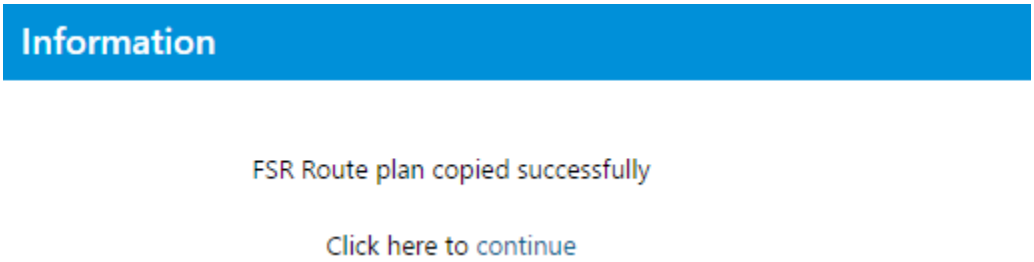


To copy, select a van.

Then select the source plan (From) and the destination plan (To).

Click on 'Copy'.

The route plan will be copied.



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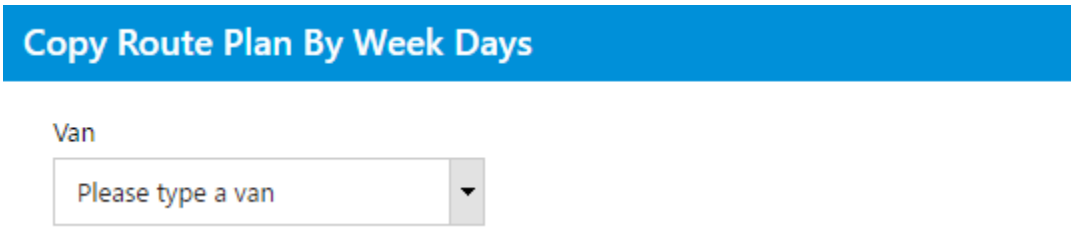
6.1.8 Copy Route Plan By Week Days

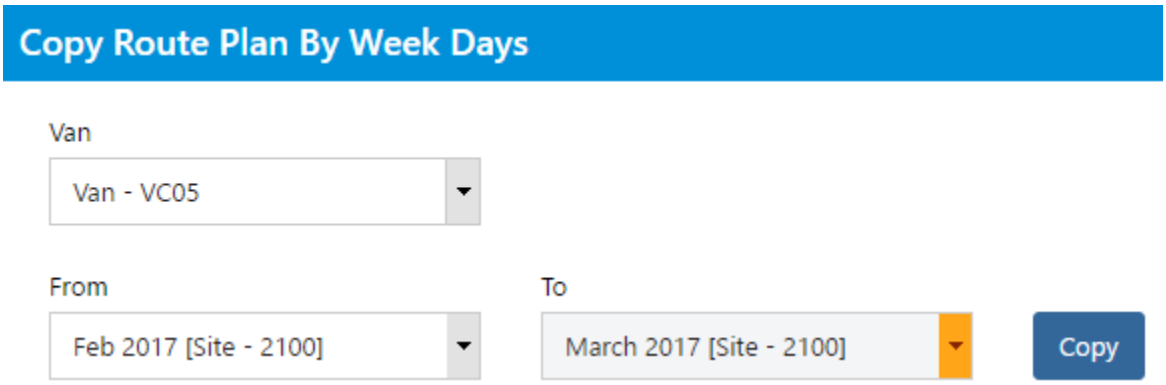
This option is similar to the copy route plan, expect the behavior that it copies route plan by the week days, not by the date.



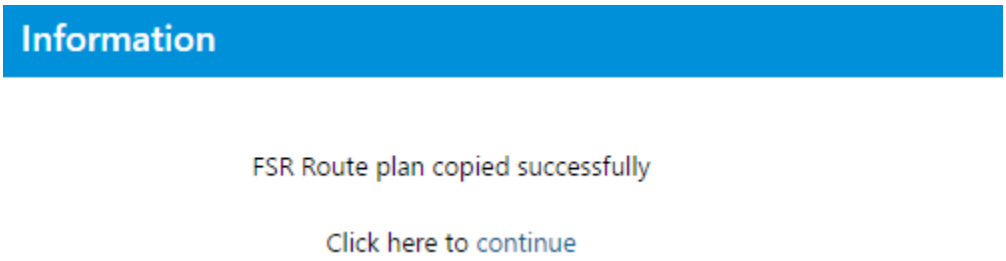
Select a van.

Select 'From' plan and 'To' plan.

Click on 'Copy'.



The route plan has been copied by week days.



6.1.9 Manage Holidays

In Manage Holidays screen, you will be able to define the days on which the FSRs will not be working. You can set a date as a holiday, and it will not be allowed to create a journey plan or route plan for a date which is set as a holiday.

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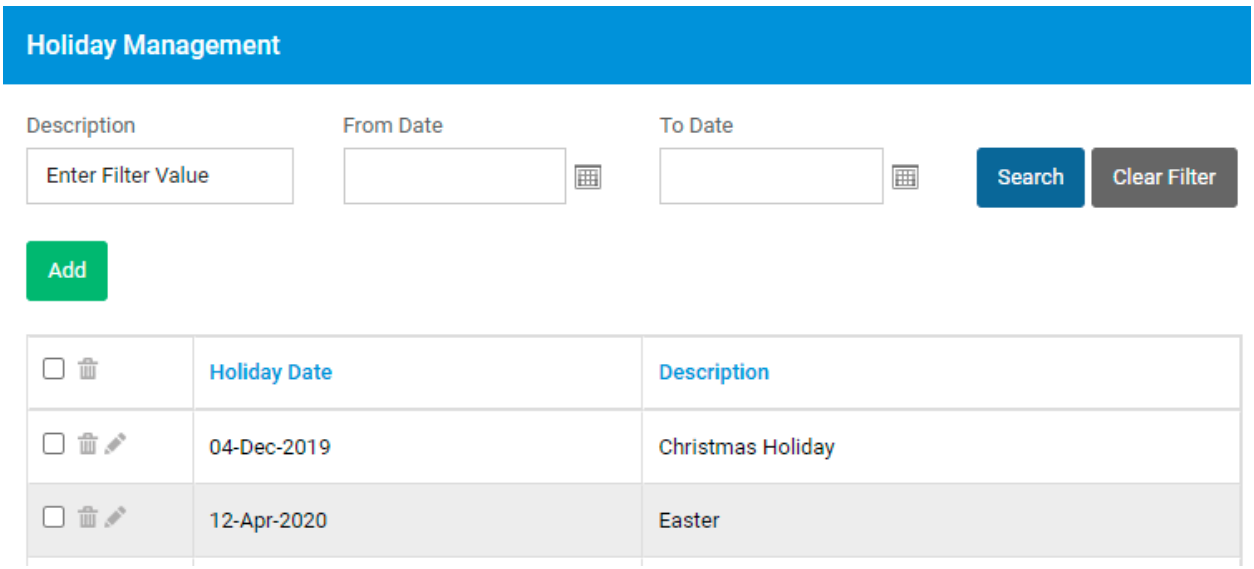
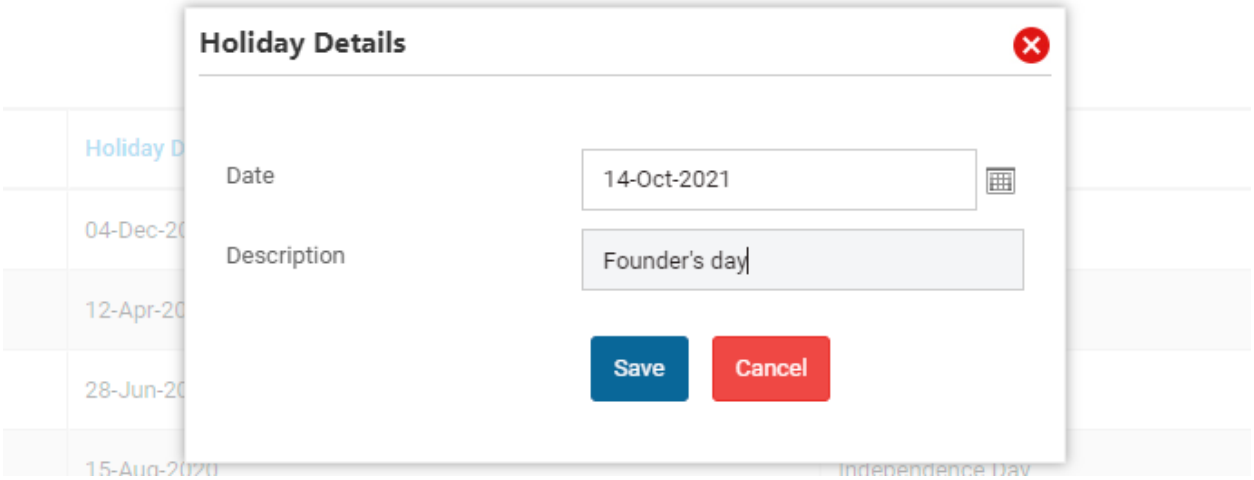


To add a new holiday, click on Add button. A pop up will be displayed.



Select a date, and type in the description for holiday. Click on Save button. The holiday will be saved.

6.1.10 Create Route Plan (New)

Create Route Plan screen can be used to create journey plan for FSRs. Select a van from the dropdown.

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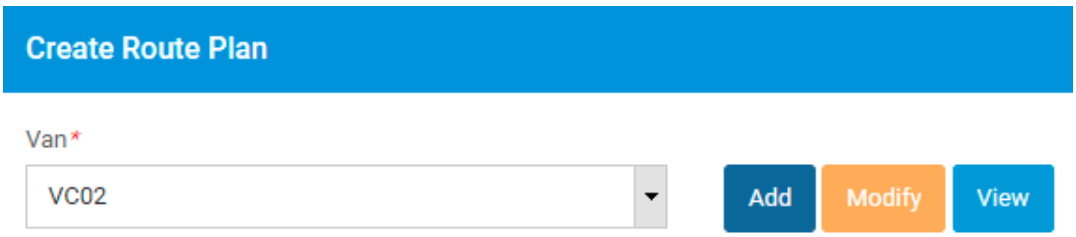
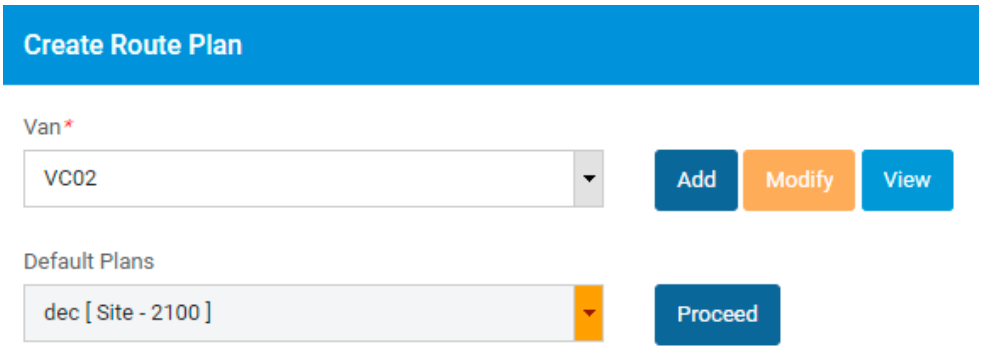
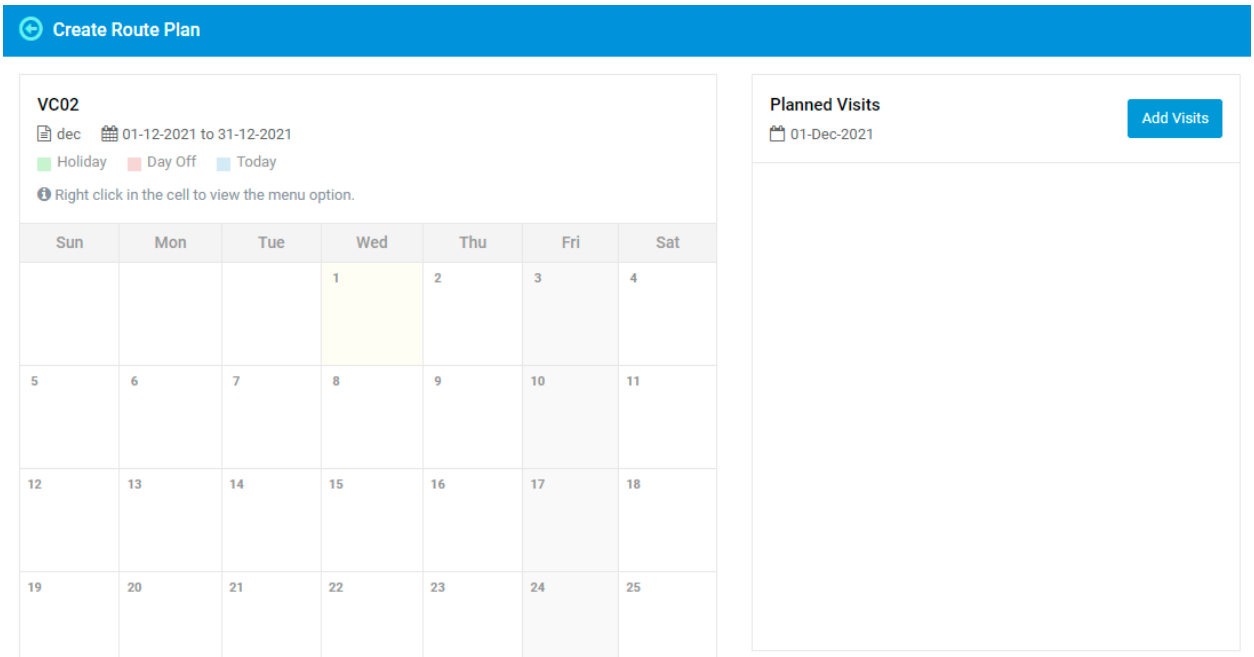


Click on Add button to create a new route plan for selected FSR.



Select the default plan and then click on Proceed button. Visit Planner screen will be displayed.



Select the day in calendar section for which visits are being planned. Then click on Add visits button.

Select the customers that will be visited on the date that was selected.

Click on Set Visits button to save the visit plan for the day.

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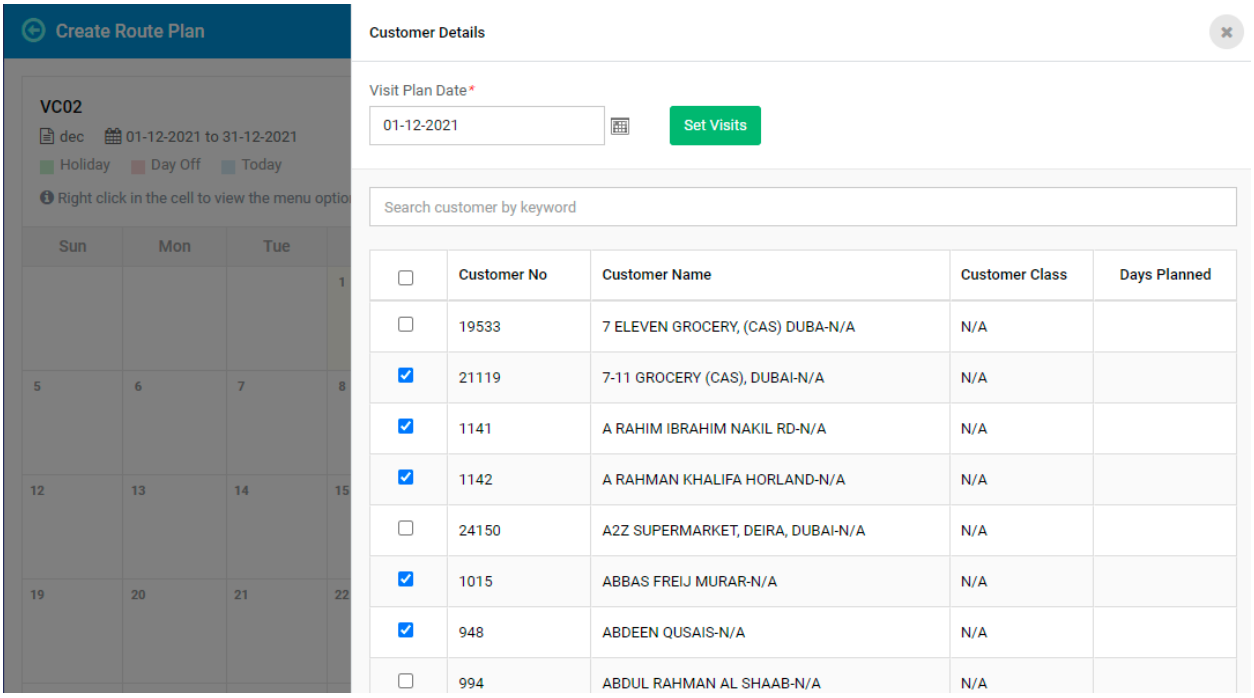
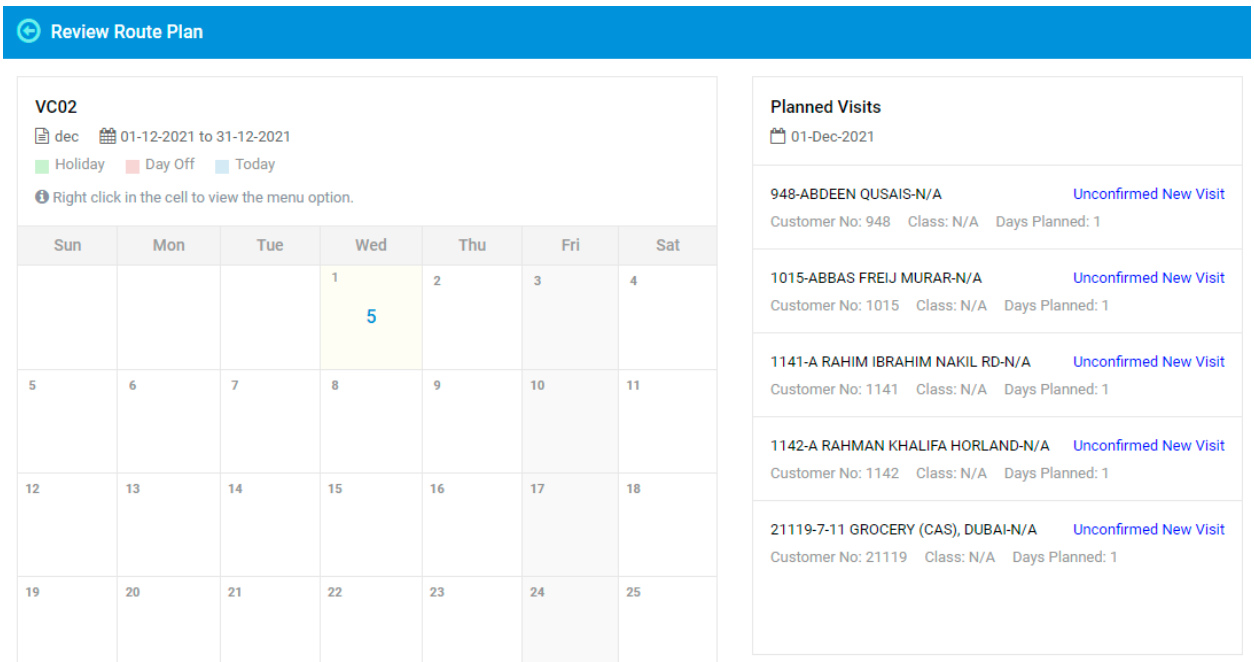


Selected visits will be added to journey plan in an unconfirmed state.



Continue the process of adding visits to other dates as well.

Click on Back button to go to the previous screen.

Click on Modify button to modify existing route plan. Click on View button to open journey planner in a view only mode.

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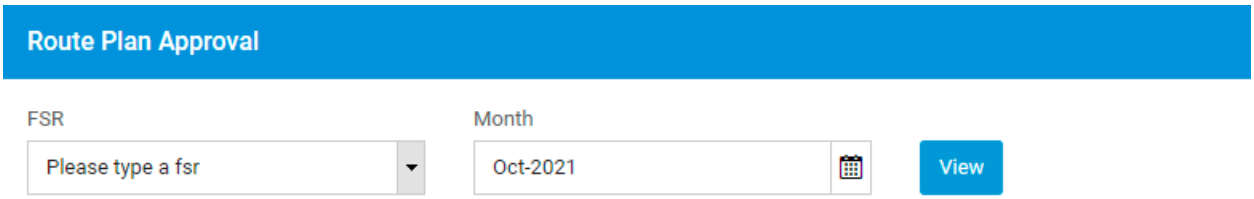
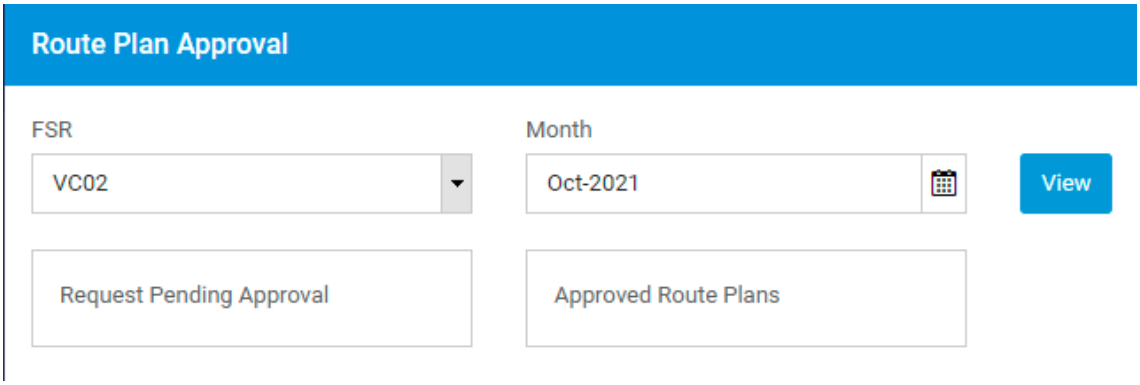
6.1.11 Approve Route Plan by Supervisor

Using this screen, supervisor will be able to review and approve the pending journey plan updates created by the team.



Select an FSR and a month and click on View button.



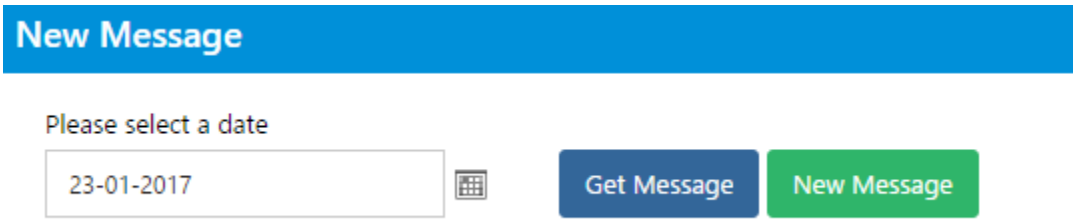
The route plans pending approvals and the ones already approved will be displayed.

7. Communication

7.1 Messaging

You can use messaging to communicate with the FSRs and other users.

7.1.1 Send Messages



To create a new message, click on 'New Message'.

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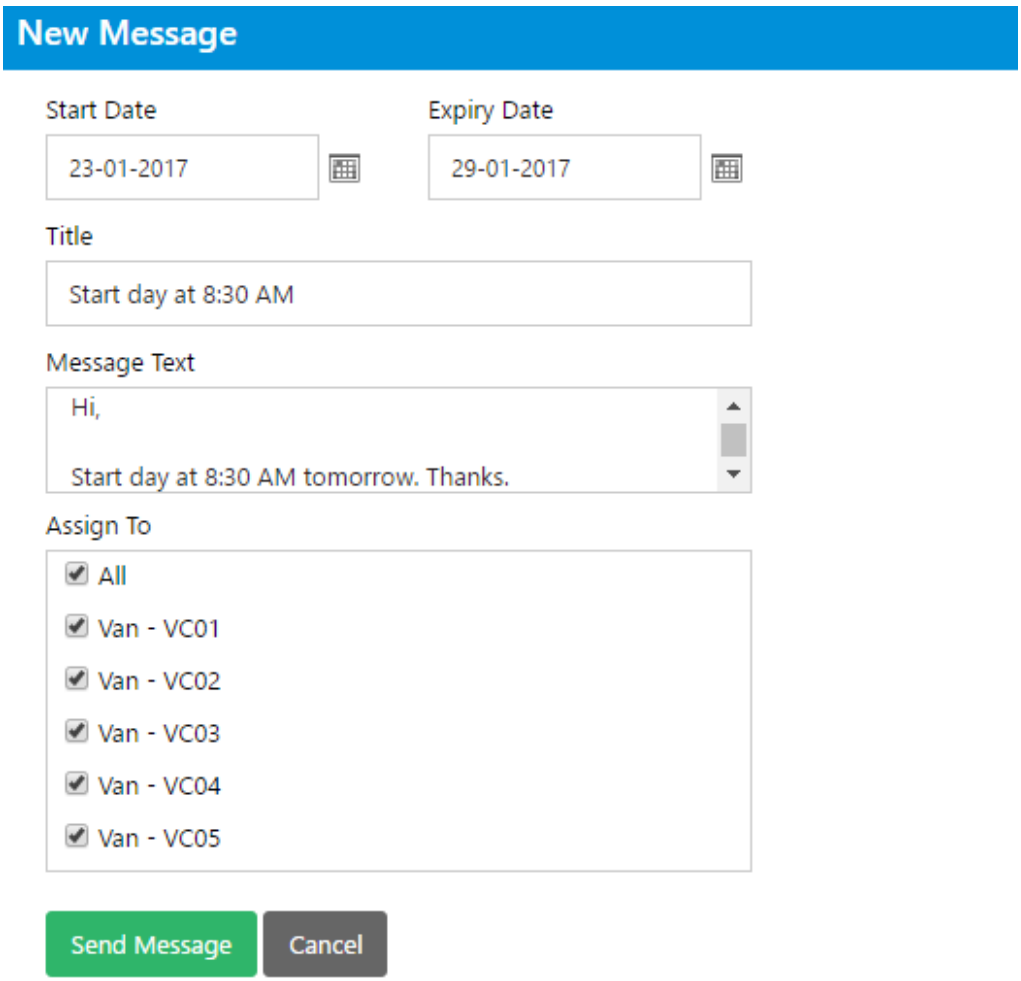
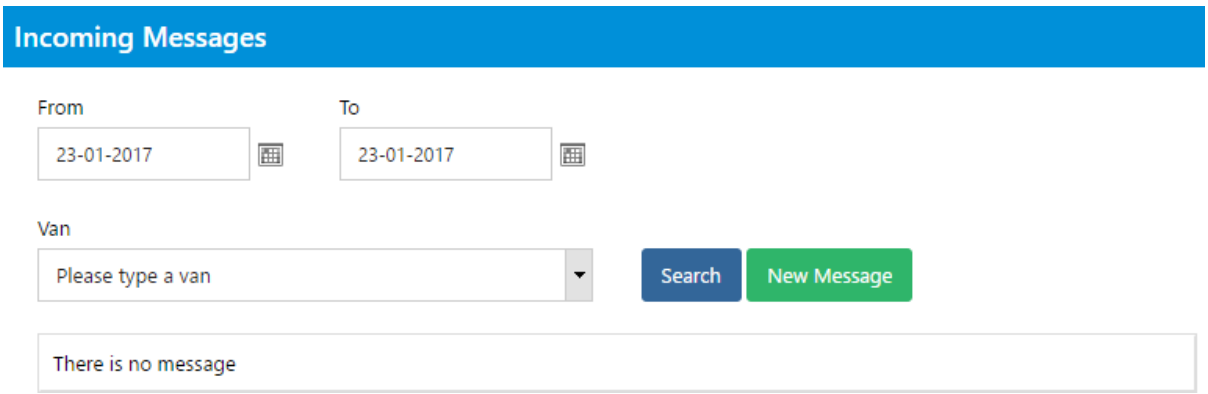


Enter the Title of message and content. Change the date and expiry date if needed.

Check the recipients of the message. Click on 'Send Message' to send.

7.1.2 Incoming Messages

You can view the incoming messages in this section.



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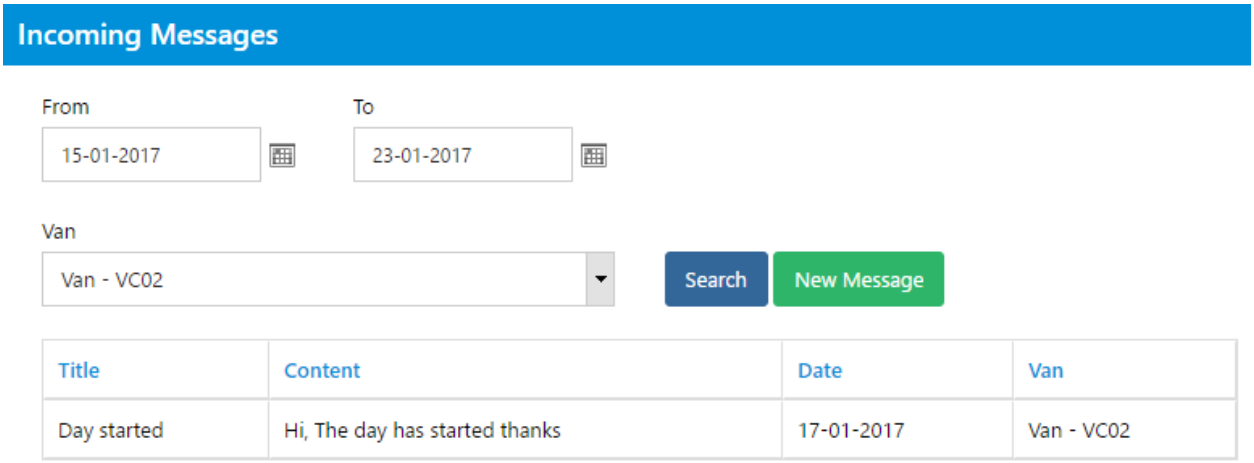
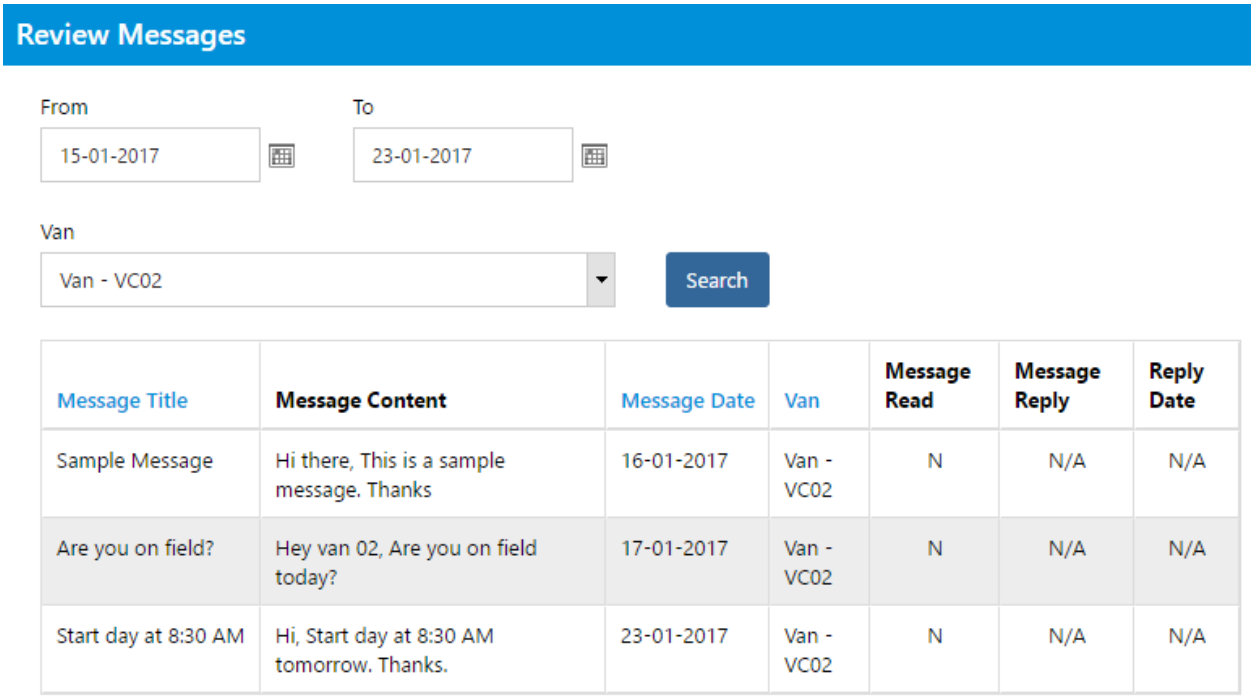
Select the date period and van.

Click on 'Search' to show all the incoming messages from that van for the date period specified.



7.1.3 Message Status

You can review the status of the messages sent. To see the status, choose the date period and van. And click on 'Search'.



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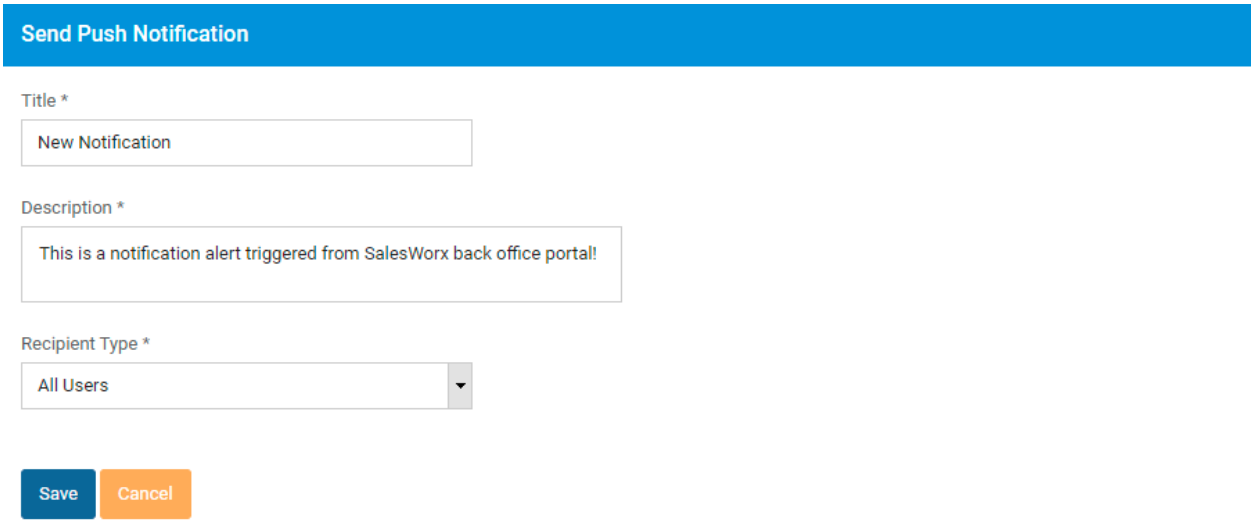
7.1.4 Send Push Notifications

You can use this screen to trigger push notifications to the FSR's mobile app.



Enter the title of the push notification and a description.

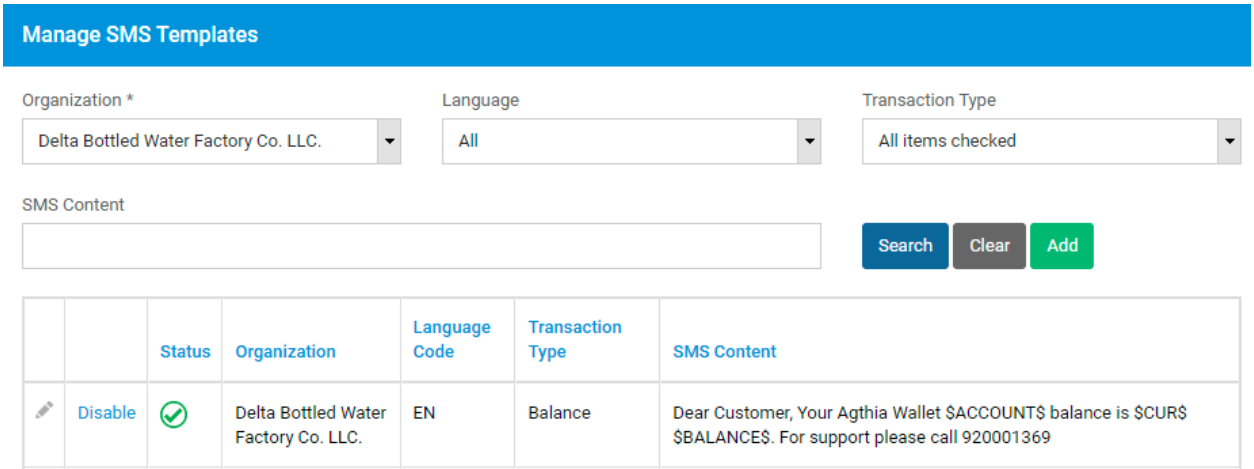
Against Recipient Type, you can select either All users or Specific users. If you select all users, push notification will be sent to all the users who uses SalesWorx mobile application. If you select Specific users, an option to specify the users will be displayed. Select the users from the list and click on Save button.

7.2 SMS

SMS section can be used to configure SMS template and to trigger the SMS to Customers.

7.2.1 Manage SMS Templates

This screen can be used to Manage the SMS sending templates. Select an organization, and filter by language or transaction type if required. Click on Search button.



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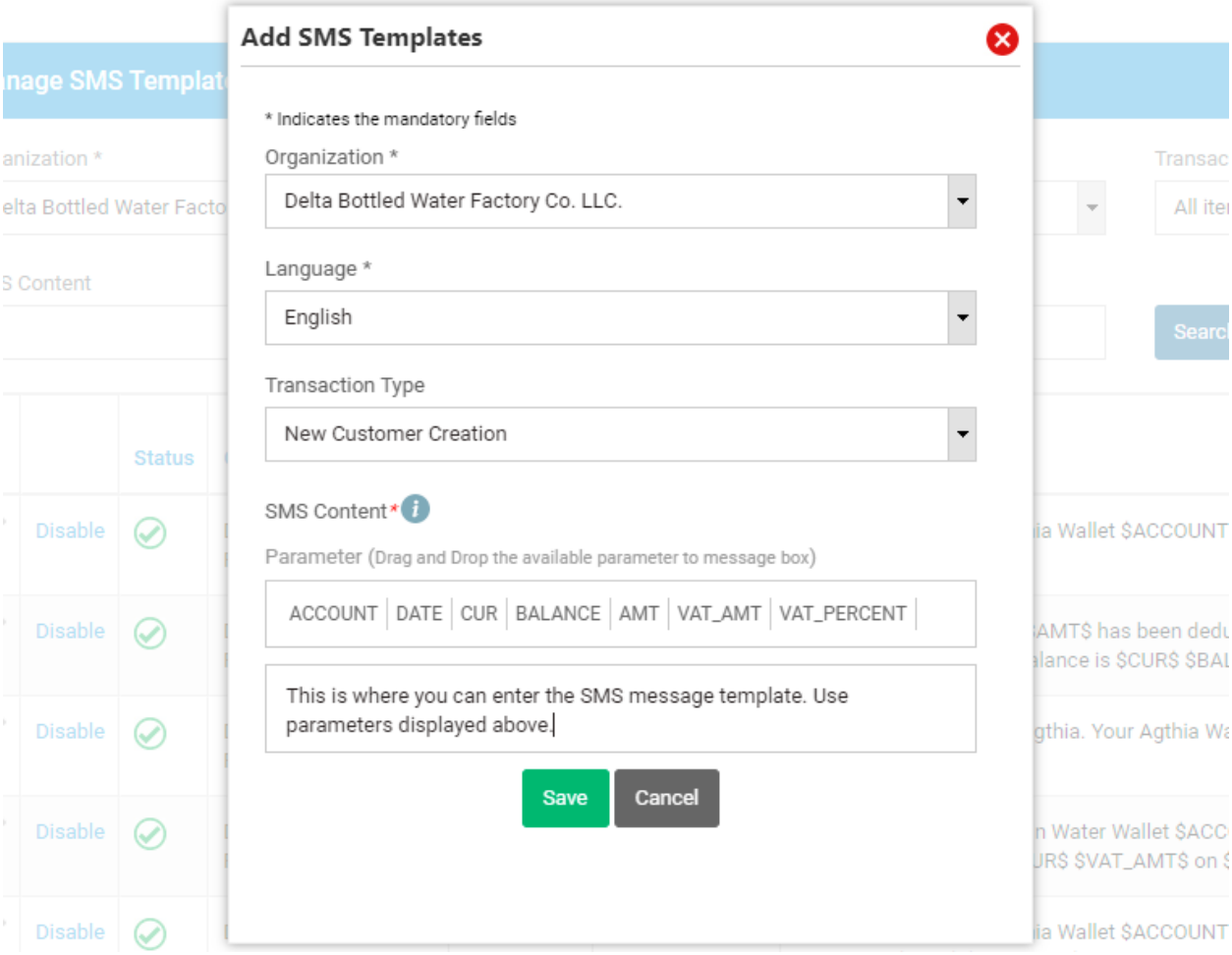
To create a new SMS template, click on Add button. A pop up will be displayed.



Fill in all the details required. Make use of the predefined parameters in your message template wherever required. Click on Save button to save the SMS template.

		Status	Organization	Language Code	Transaction Type	SMS Content
	Disable	✓	Delta Bottled Water Factory Co. LLC.	EN	Balance	Dear Customer, Your Agthia Wallet $ACCOUNT$ balance is CUR $BALANCE$. For support please call 920001369

Click on Edit button to modify an existing template.

Click on Disable button against the SMS template to disable an existing template.

7.2.2 Send Wallet Balance SMS

This screen can be used to trigger an SMS to customer informing about their current wallet balance.

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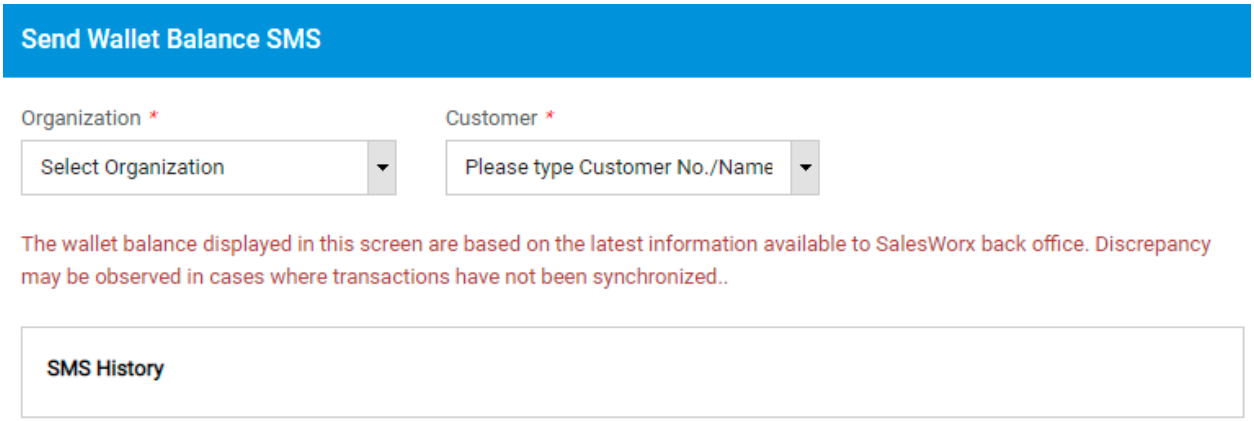
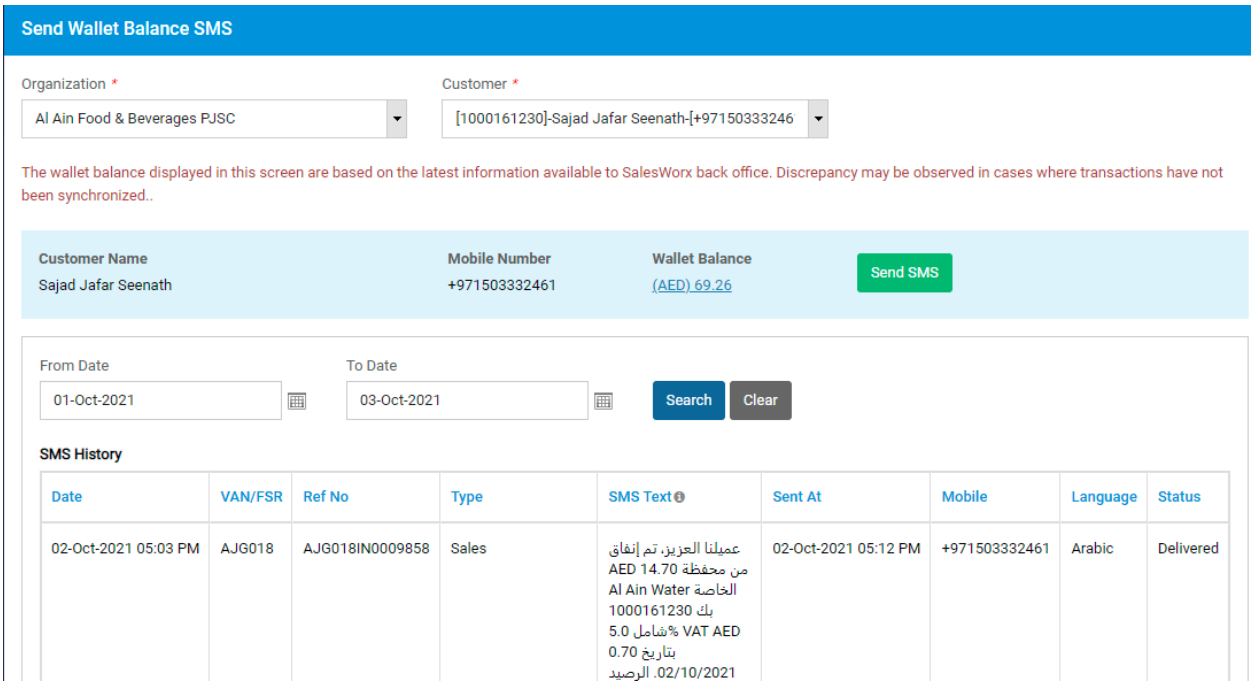


Select an organization and a customer.



The current wallet balance and mobile number of the customer will be populated. To view the breakdown of the wallet balance, click on the wallet balance amount that is displayed on screen. A pop up will be displayed.

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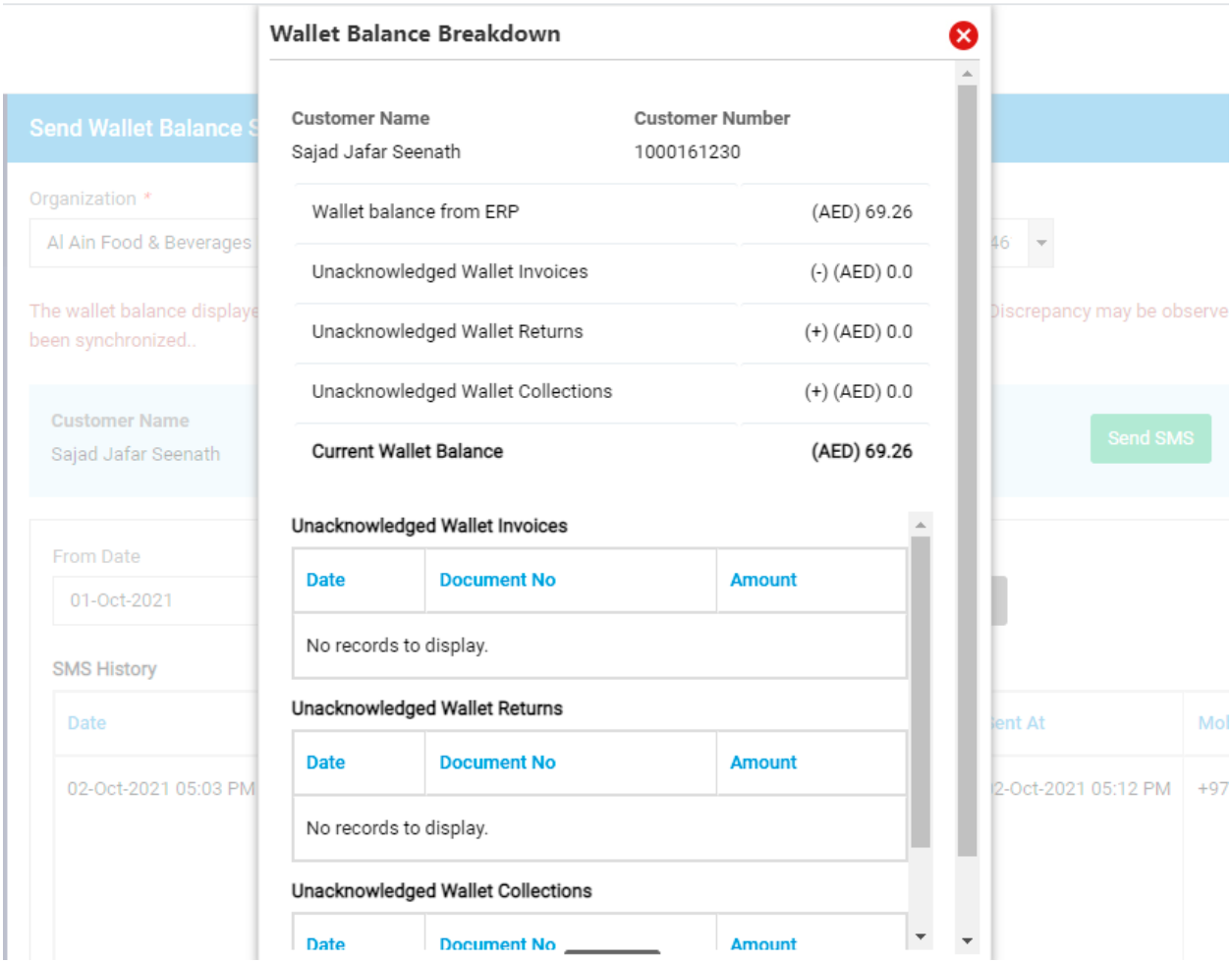
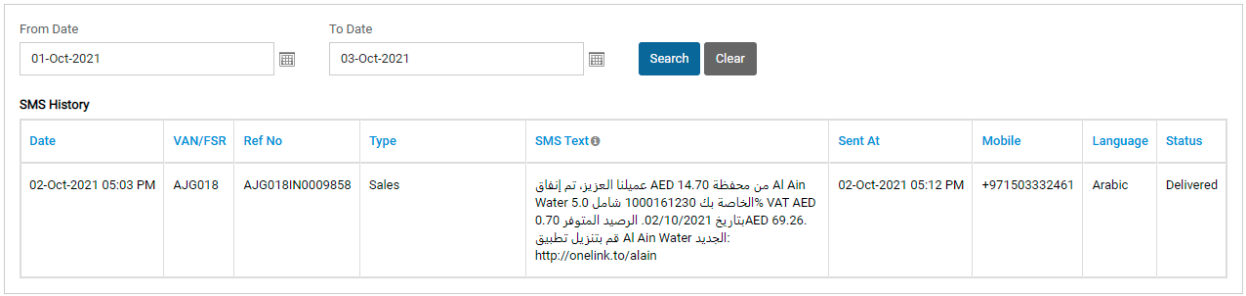


To send the current wallet balance as SMS, click on Send SMS button. The SMS will be sent.

The SMS history will be displayed on the table at bottom of the screen.



7.3 FSR Visit Objective

Using this screen, you will be able to define objectives for FSRs. An alert will be triggered to FSR regarding the objective assigned. Once completed, or actioned upon, they will be able to update the status of objective.

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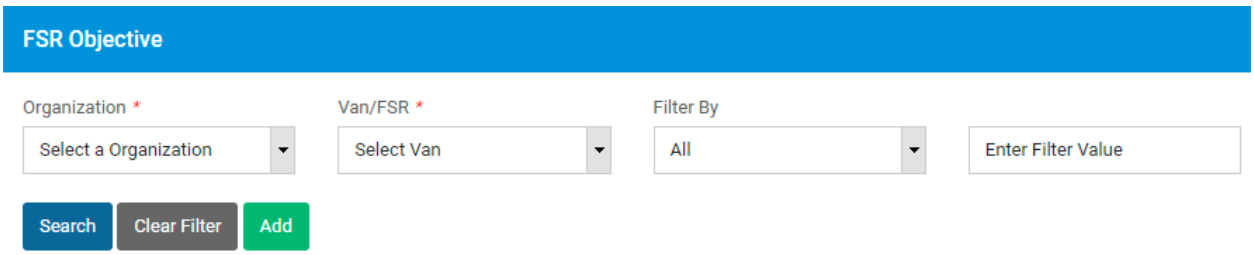
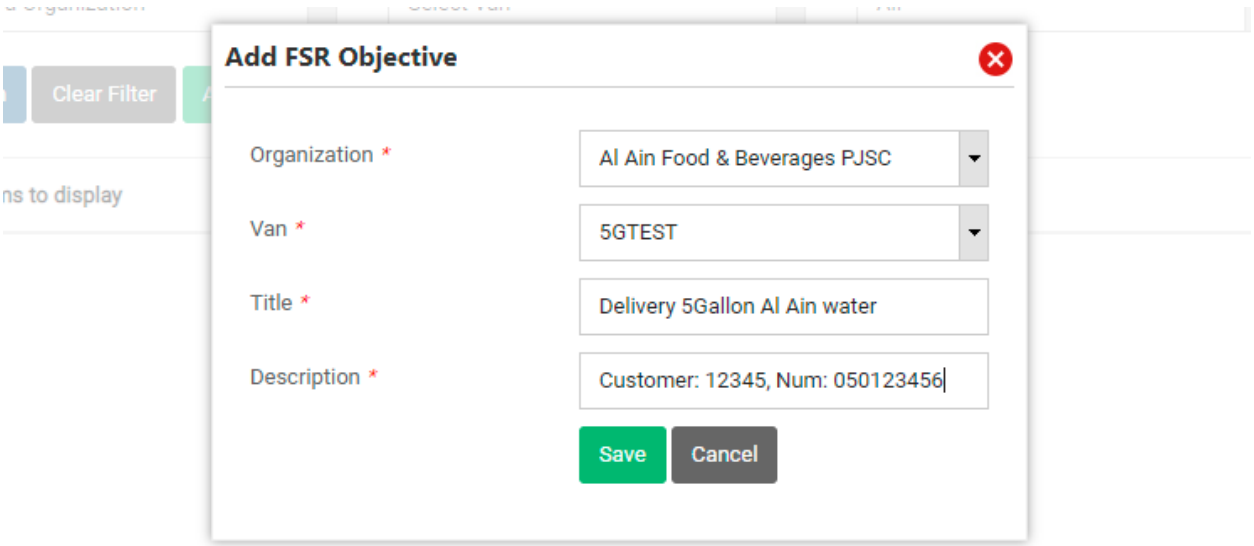
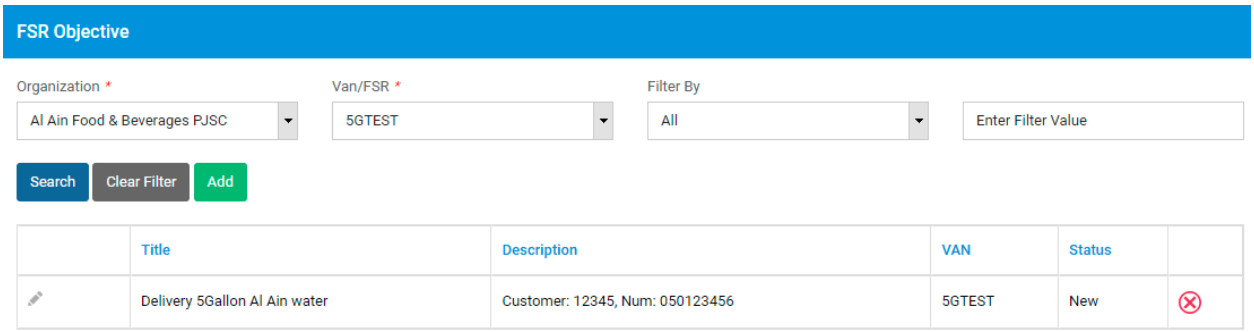


Select an organization and an FSR. Click on Add button to add a new objective.



Fill in the required details and click on Save. The objective will be sent to the FSR.

The status of the objective can be viewed on the tabular view.



8. Product Management

In this module, you can manage the details related to the products, must stock lists, targets for FSRs, and bonuses and discounts.

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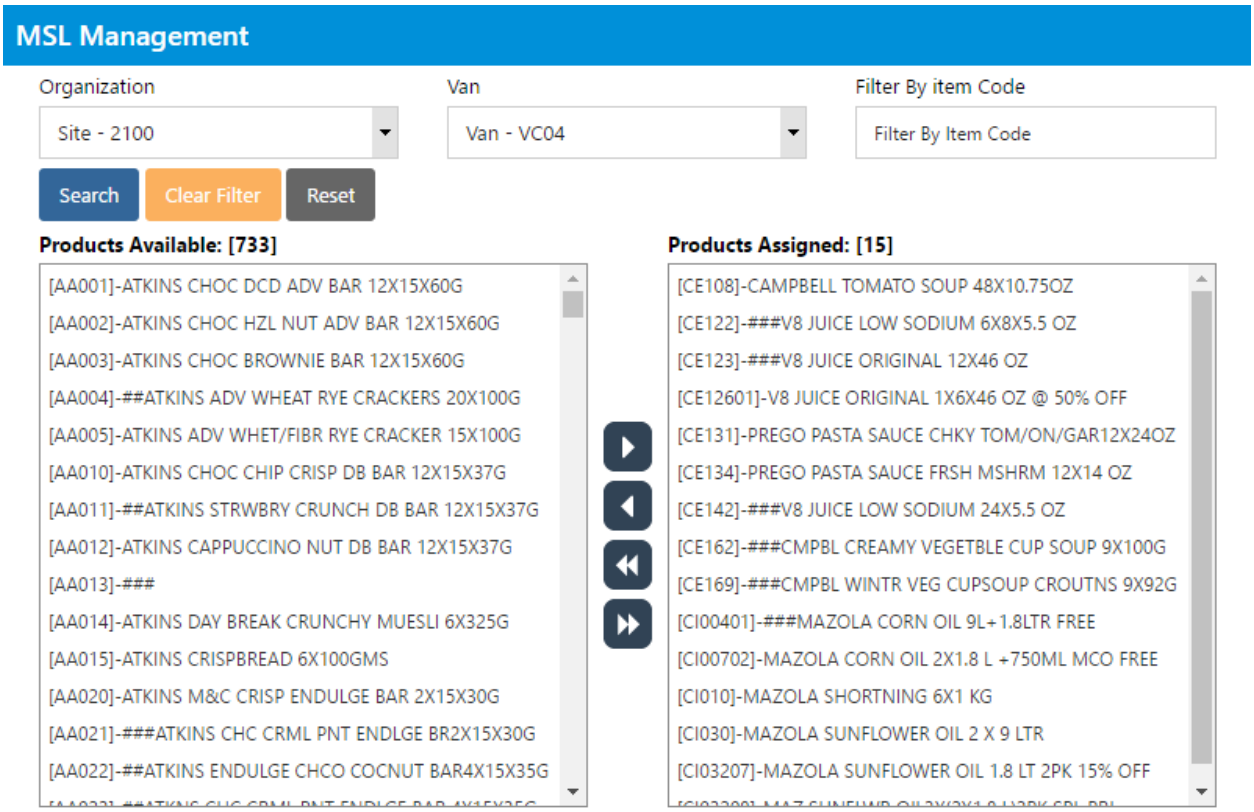
8.1 MSL Management

MSL Management allows you to assign a set of products as a must stock list items. It can be assigned to one van at a time. Select the organization and the van and click on Search.



The products assigned to MSL will be displayed in the box to the right, whereas unassigned products will be in the box to the left.

To assign a product, select a product in unassigned list and click on button.

To assign all the products, click on button.

To unassign a product, select the product in the assigned list and click on button.

To unassign all the products, click on button.

8.2 Customer Product Code

In cases where your customers require you to include the product code as per their definition, this screen can be used. You will be able to define customer product codes (also known as PLU codes) against your products.

Select a customer from the dropdown and click on Search. All the customer specific product codes available in the system will be populated.

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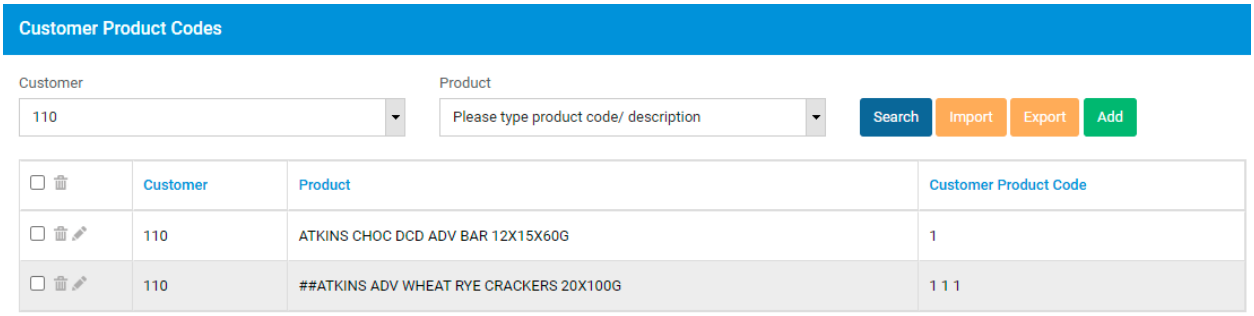
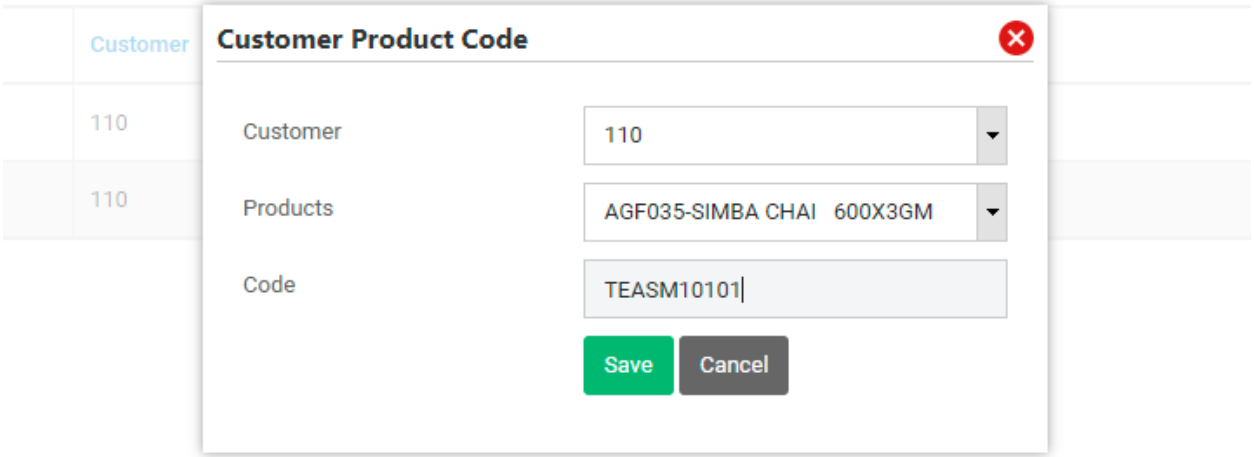


To add a new customer product code, click on Add button.

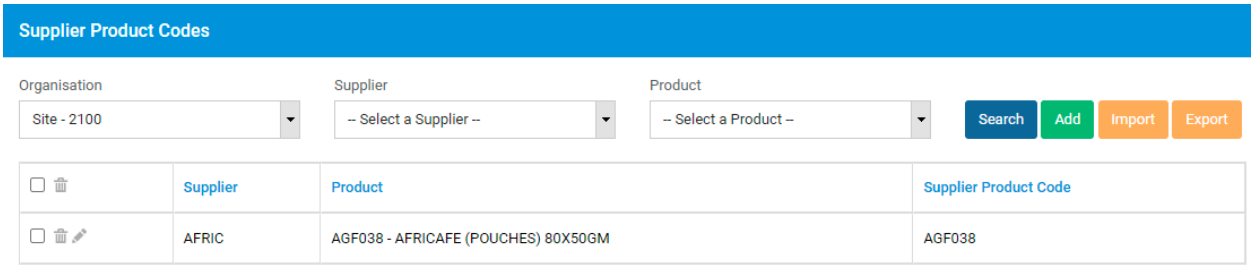


Select the customer, select your item from the list, and enter the customer specific product code. Click on Save to save this information.

You can also import the customer product codes using an excel file by going to Import option on the screen.

8.3 Supplier Product Codes

Similar to customers, Suppliers may also maintain and require you to include their product codes in all the documents sent to them. In such cases, you can use Supplier Product Codes screen to define it.



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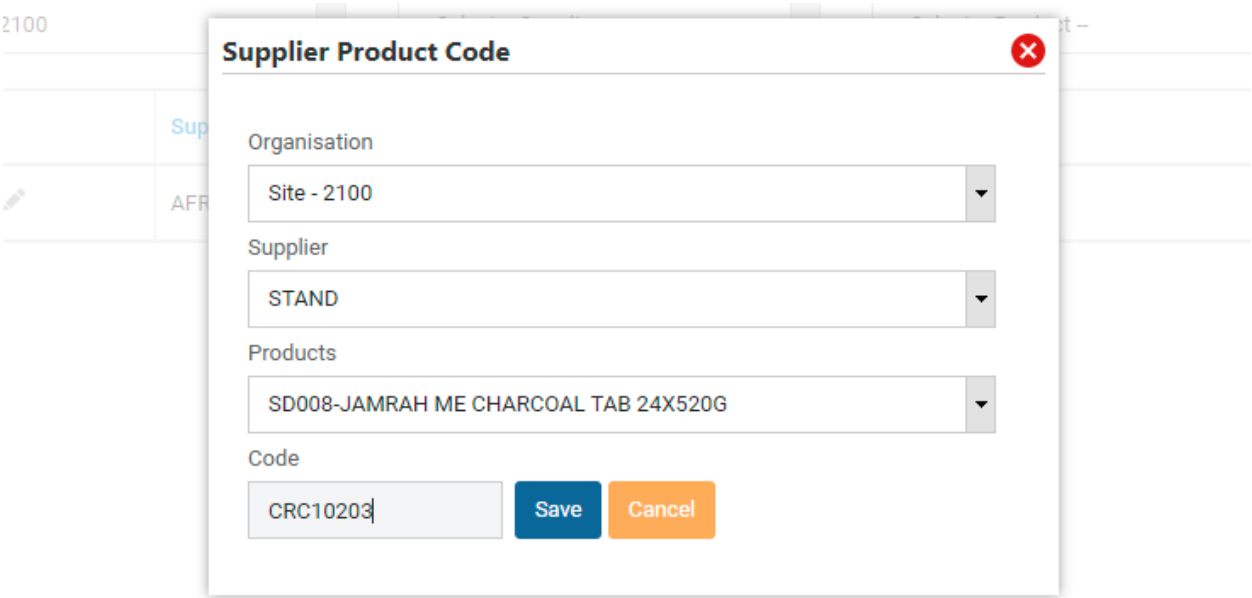
Select an organization and click on Search button to populate the supplier product codes that are already defined in the system.

To add a new supplier product code, click on Add button.



Select the organization, supplier, and the product. Enter the supplier product code and click on Save button. The supplier product code will be saved.

You can also import supplier product codes using an excel file by using the Import option.

8.4 FSR Target Definition

Using FSR Target Definition, you will be able to define targets for your team in terms of either quantity or value. Only excel import option is available for this.

There will be three parameters for defining targets- Primary, Secondary, and Tertiary classification. Based on the configuration that is set, the values that are to be fed into these columns will vary. You can contact SalesWorx support team for assistance.

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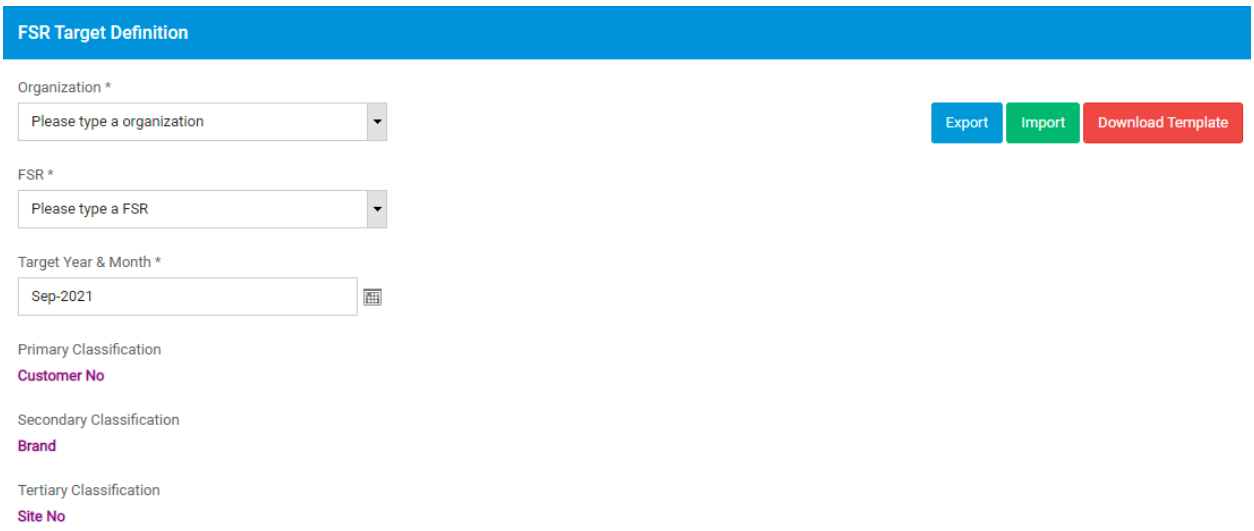
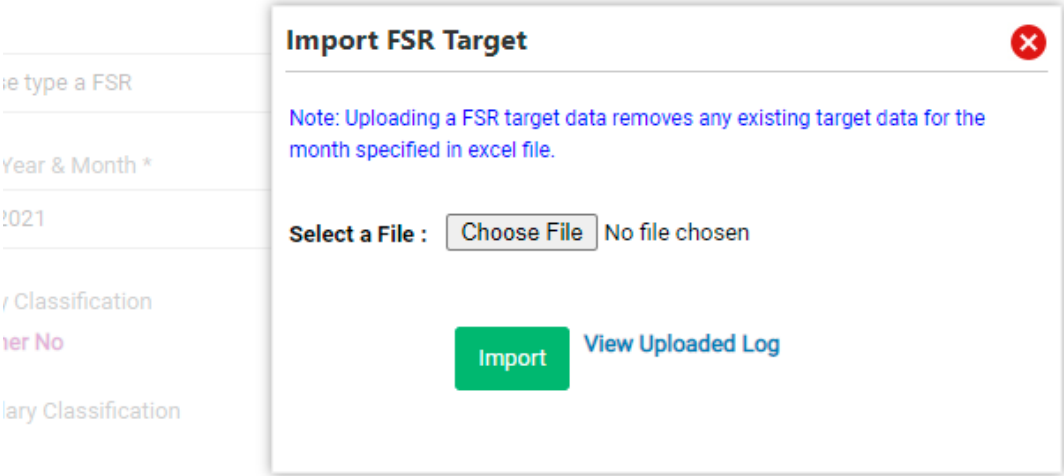


To import targets, select an organization and then click on Import.



Select a file by clicking on Choose File option and then click on Import. You will receive a message if the targets are imported successfully. If there are any errors, you will be able to view them by clicking on View Uploaded Log button.

8.5 SKU Wise Target Definition

This module is used to set targets for FSRs at an SKU level. A target can be set for an FSR for a particular month at a time.

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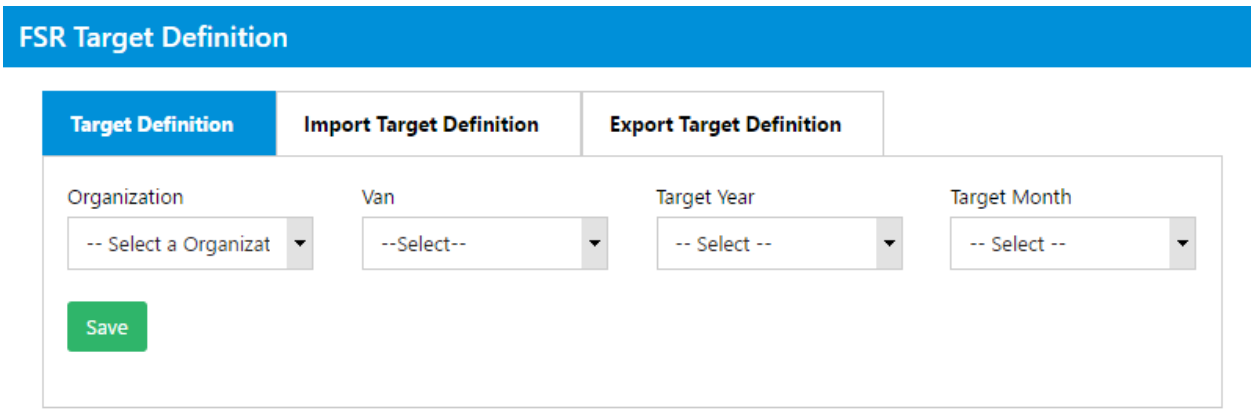
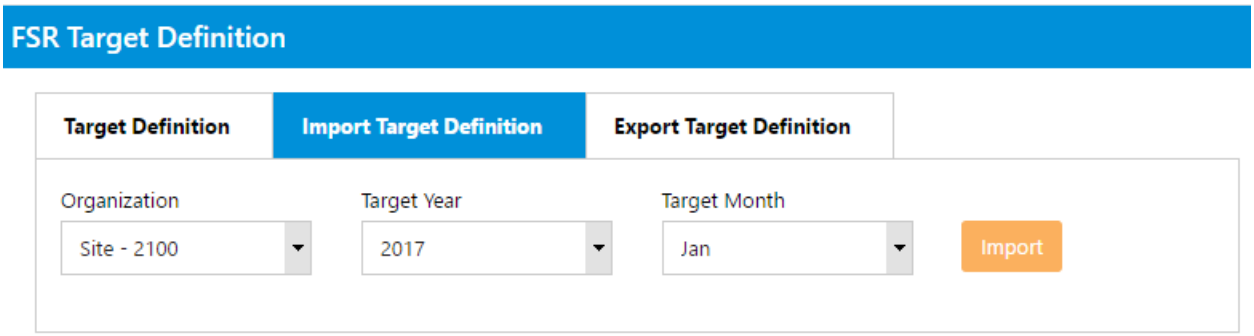


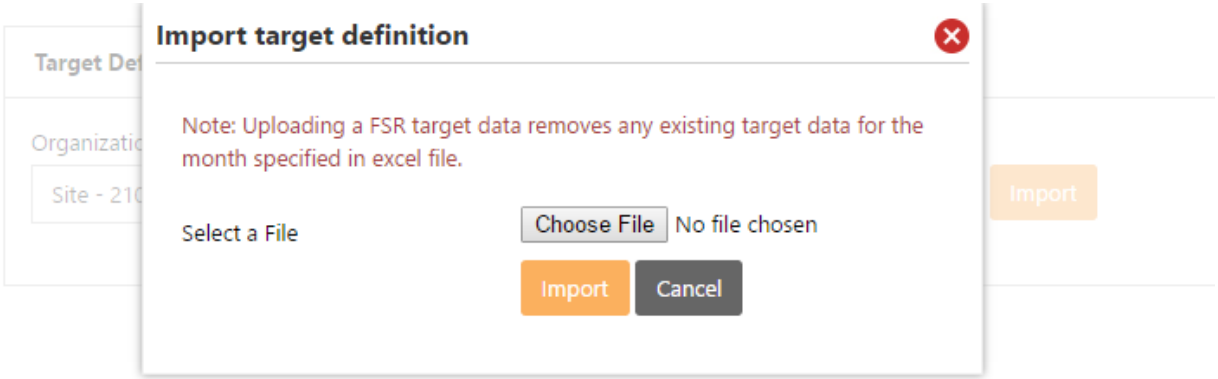
There are three tabs; Target definition, Import target definition, Export target definition.

Import Target Definition:

To import a target definition from an excel file, click on 'Import Target Definition' tab. Select Organization, Year and Month. Click on 'Import' button.



Choose the file and click on 'Import'.



The targets will be set based on the data in the excel file.

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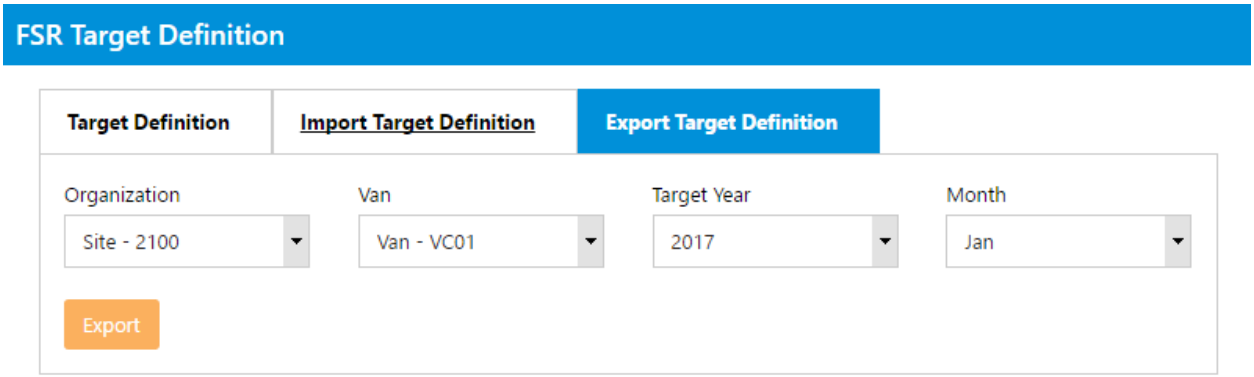
Export Target Definition:

To export the target definition to an excel file, click on 'Export Target Definition' tab.

Select Organization, Van, Target Year and Month.

Click on 'Export' button.



Your excel file with target definition details will be downloaded.

Target Definition:

To set a target for an FSR, click on 'Target Definition' tab. Select Organization, FSR, Target year and Month.

The products list will be loaded. You can use search field to narrow down the products list.

Enter the Quantity or Value against products.

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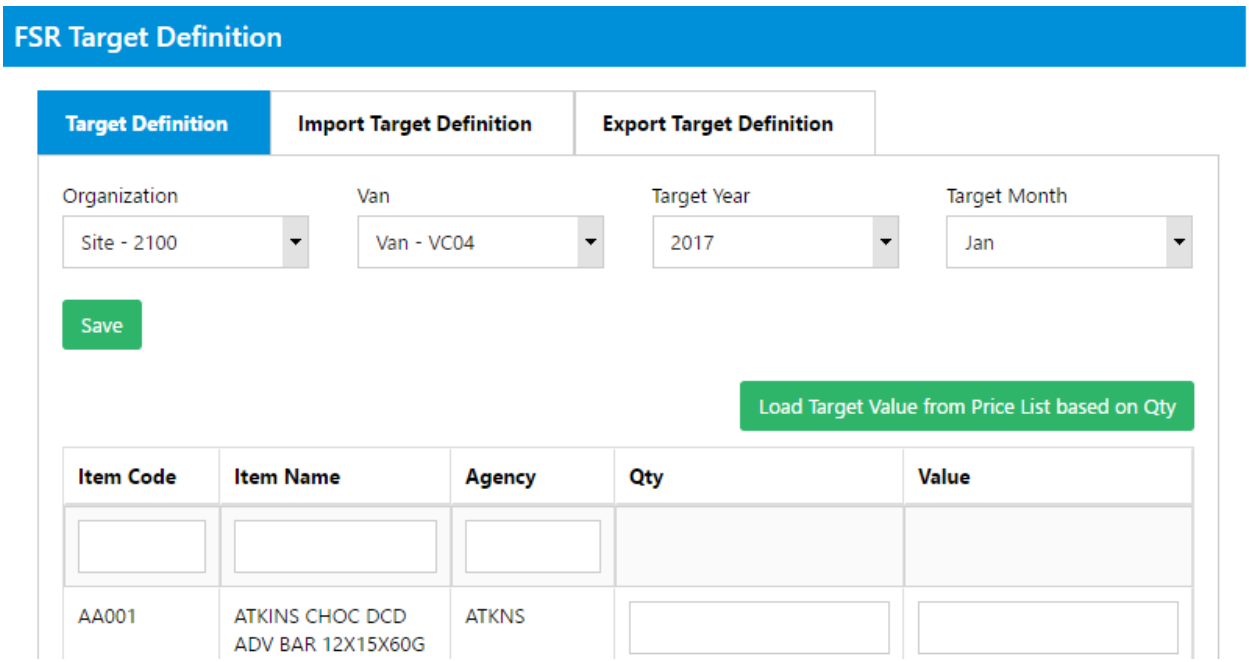
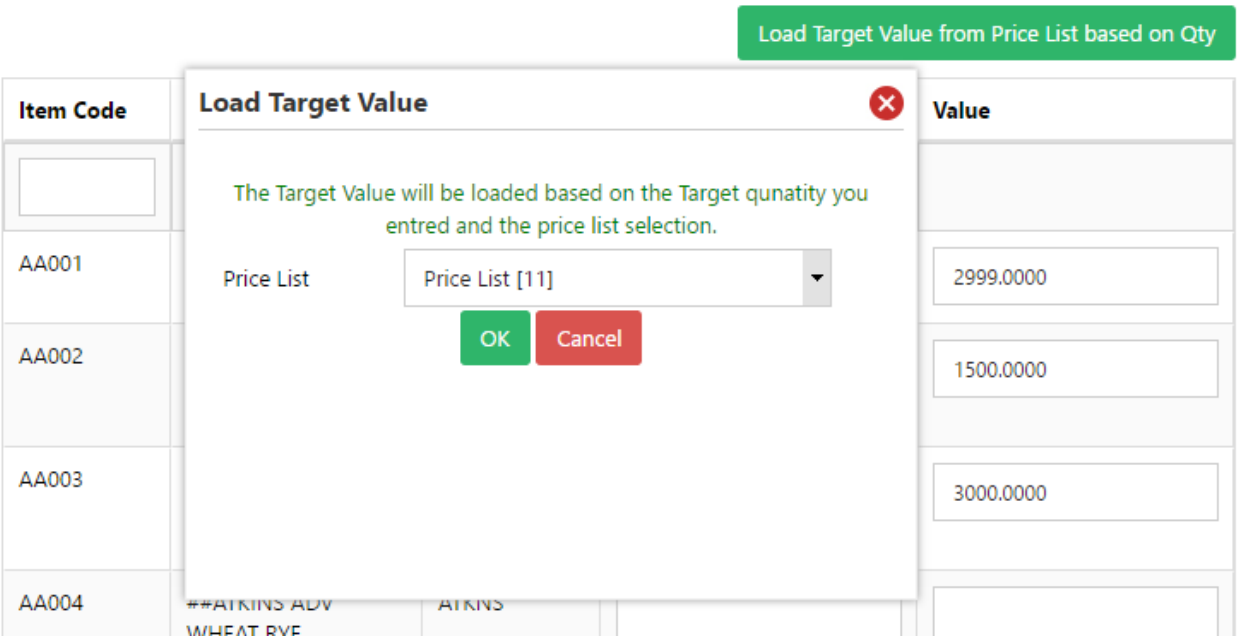


You can also enter only the quantity and load the total value for product based on a price list. To do this, enter the quantity and click on 'Load target value from price list based on Qty'.

Choose a price list from the drop down. Click on OK to load.

The value based on the price list will be loaded and displayed in 'Value' column.



Click on 'Save' button to set the targets.

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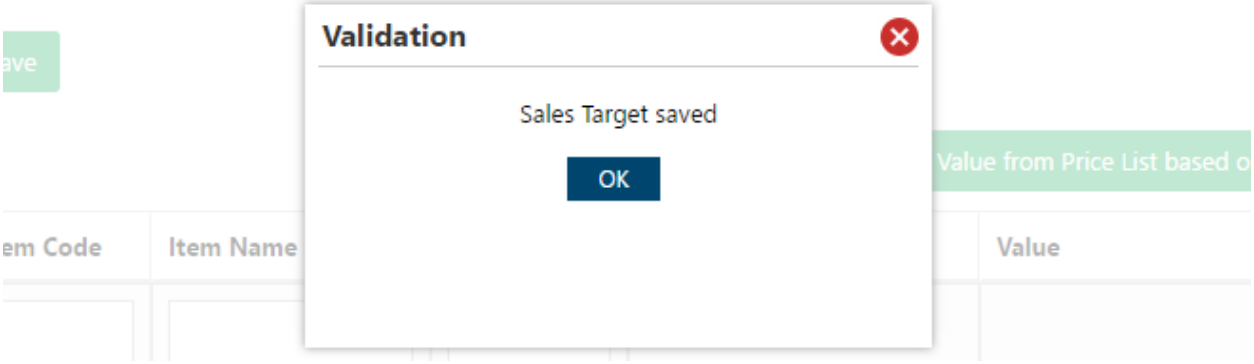

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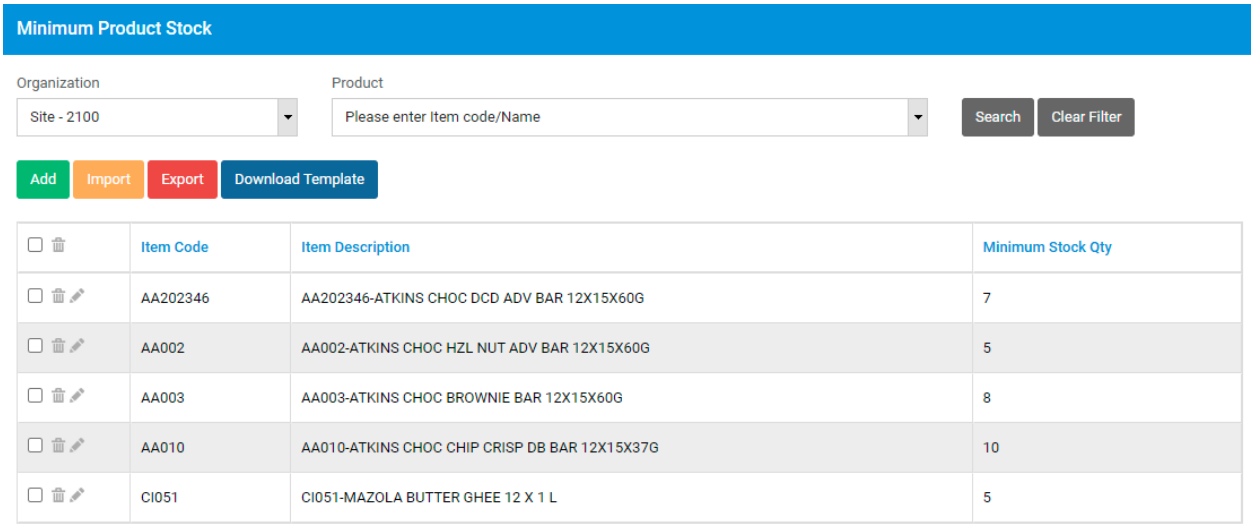
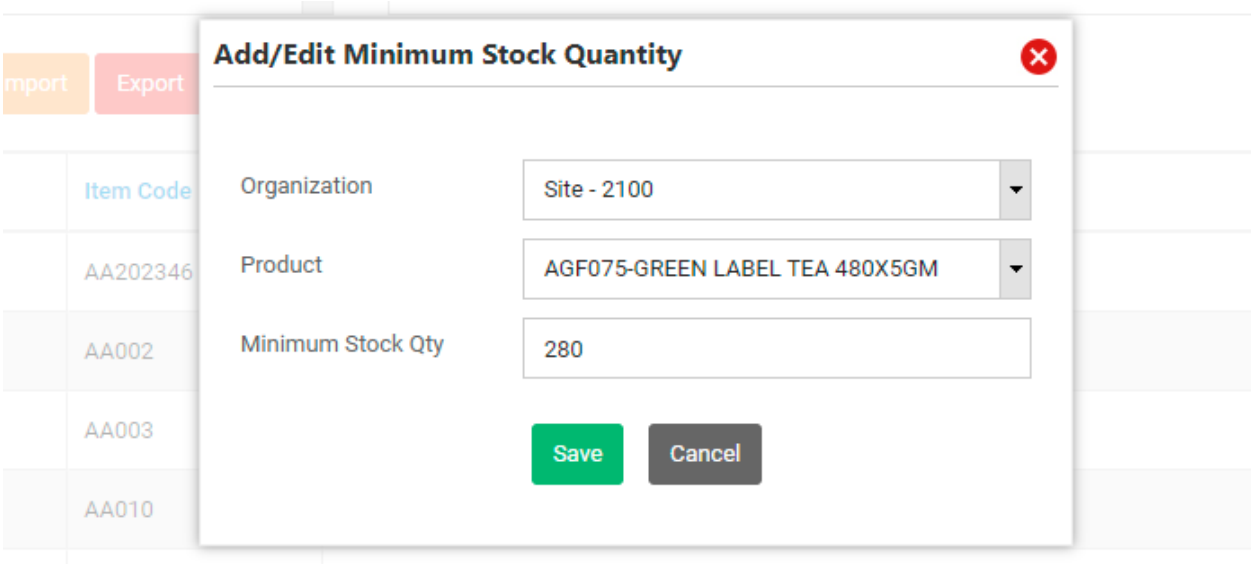
8.6 Minimum Product Stock

In minimum product stock definition screen, you can define what is the minimum stock level of items that must be maintained in each van.

Select an organization and click on Search to view the existing minimum stock defined for items.



To add a new definition, click on Add button.



Select the organization and Product. Enter the minimum stock quantity against the item and click on Save button.

The definition will be saved and a message will be displayed.

You can also import minimum stock level definition using an excel file by going to Import option.

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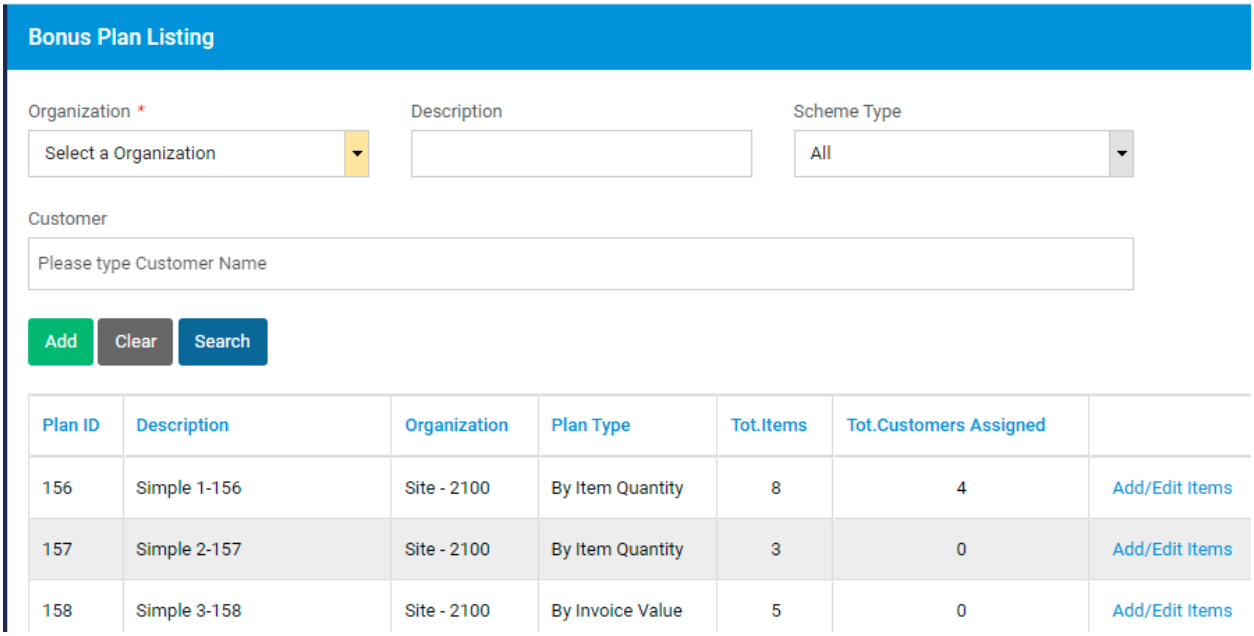
8.7 Bonus/Discount Management

You can manage bonus plans, discounts, and customer FOC rules in this section. The options under this section are Simple bonus listing, Bonus assortment plan listing, Discount definition, and Customer FOC discount rules.

8.7.1 Simple Bonus Listing

8.7.1.1 Simple Bonus by Item Quantity

In simple bonus by Item Quantity, you can set one bonus item for one order item. The bonus type can be point, or recurring.



To create a new bonus plan, click on Add button. A pop up will be displayed.

Select and Organization and enter the description of the bonus plan. Select Scheme Type as By Item Quantity.

If transaction type is applicable, select the transaction type (CASH/CREDIT) from the dropdown.

Click on Save button to save the bonus plan definition.

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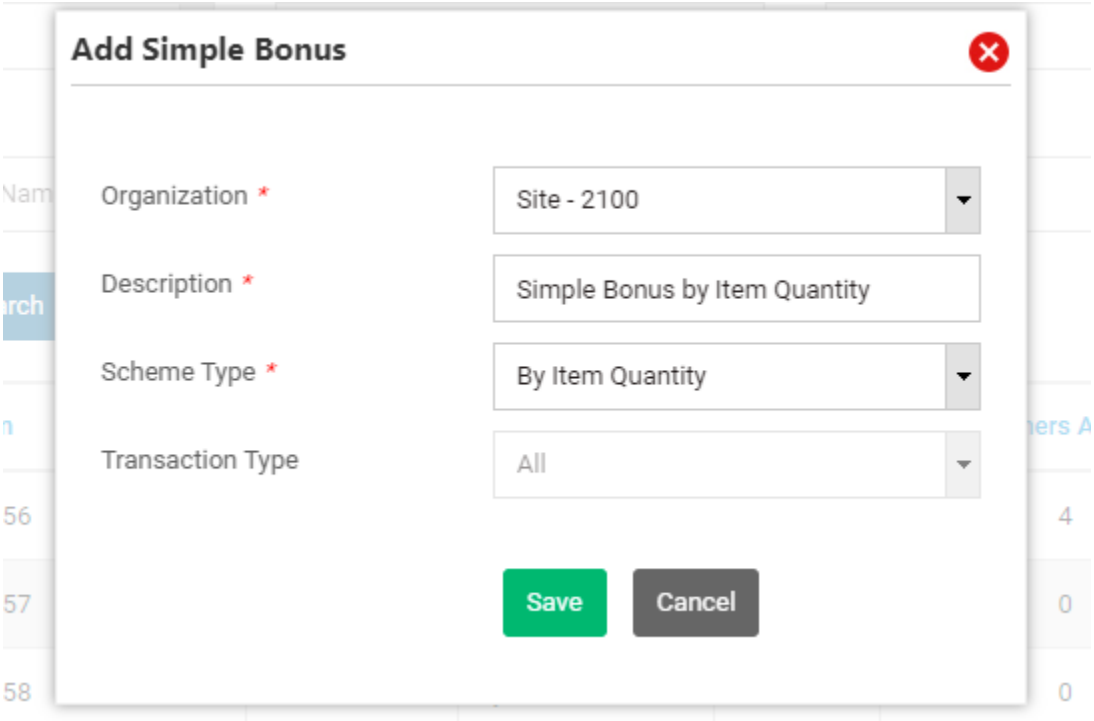
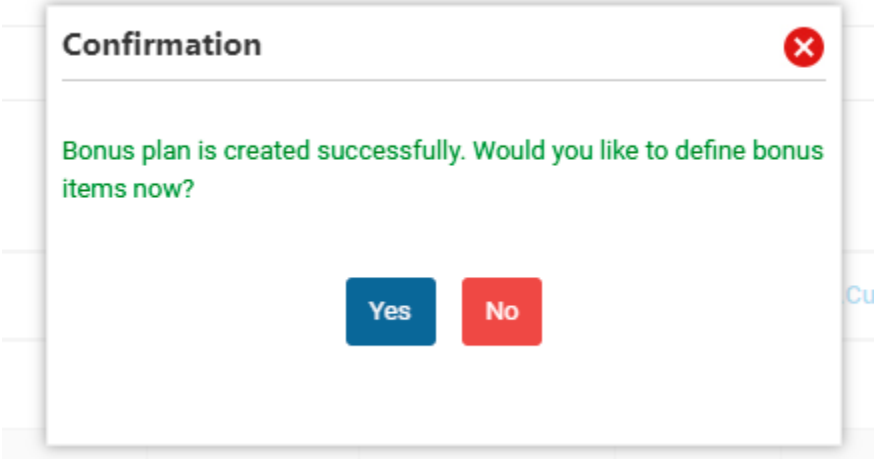


Bonus plan will be created and a pop over will be displayed. If you wish to define the items that belong to bonus plan now, click on Yes button.



Select the order item and bonus item, along with the unit of measurement. Set the bonus type- POINT or RECURRING.

Enter From and To order quantity, along with the bonus quantity.

Set the promotion duration; Valid From and Valid To date. If you wish to define that a customer can get only a maximum of specific bonus quantity in a calendar month, specify this quantity in Maximum FOC Qty field.

Click on Add button.

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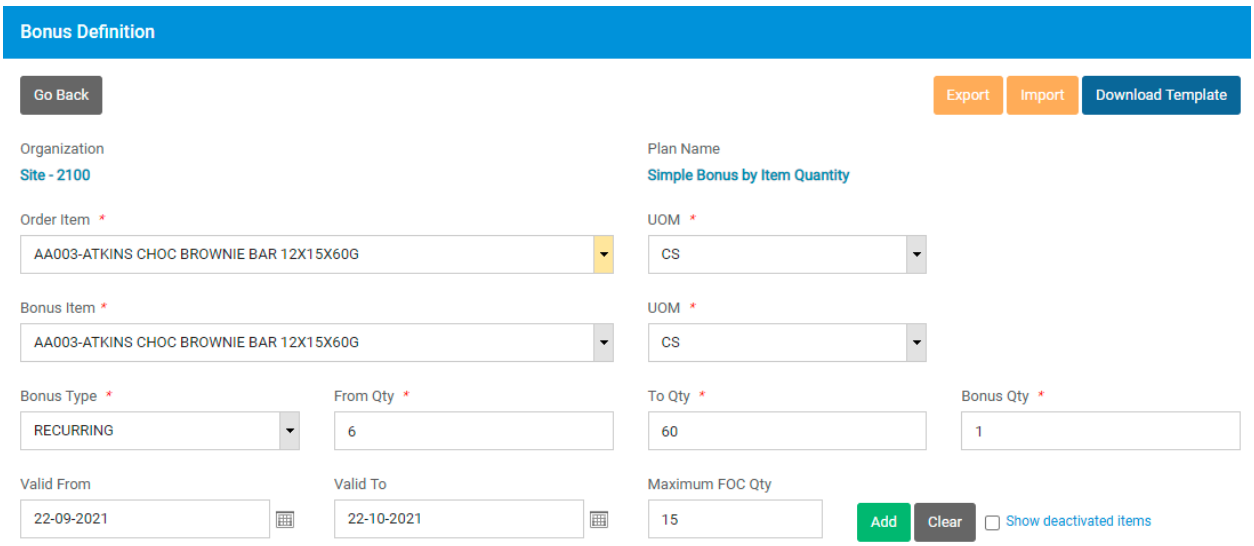
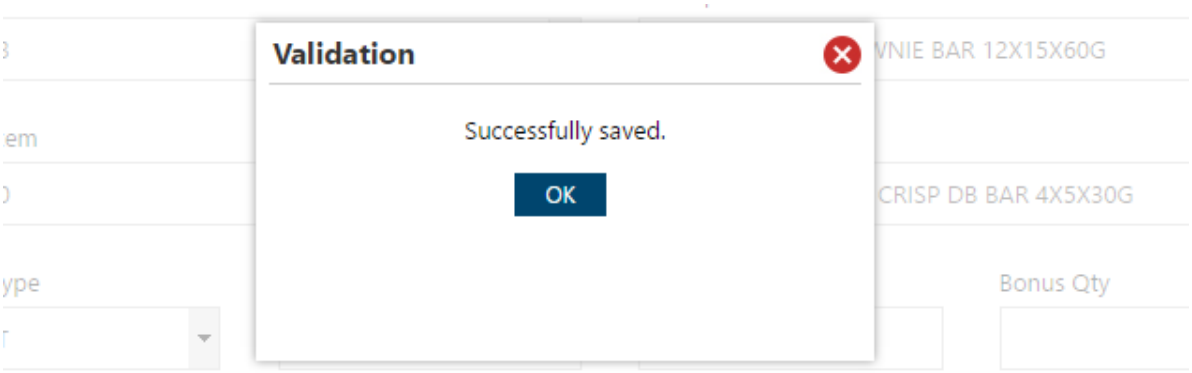


A confirmation will be displayed.



The added item will be displayed on the table at the bottom of the screen.

	Order Item	UOM	Bonus Item	UOM	From Qty	To Qty	Type	Bonus Qty
Deactivate	AA003-ATKINS CHOC BROWNIE BAR 12X15X60G	CS	AA003-ATKINS CHOC BROWNIE BAR 12X15X60G	CS	6	60	RECURRING	1.00

Repeat the process to add more order items and bonus items.

Click on Go Back button to redirect to the Plan definition screen.

Plan ID	Description	Organization	Plan Type	Tot.Items	Tot.Customers Assigned			
205	Simple Bonus by Item Quantity	Site - 2100	By Item Quantity	1	0	Add/Edit Items	Assign Customers	Edit
204	December Promo 2021	Site - 2100	By Item Quantity	1	0	Add/Edit Items	Assign Customers	Edit

You can Add or edit the items later by clicking on 'Add/Edit Items' in the table.

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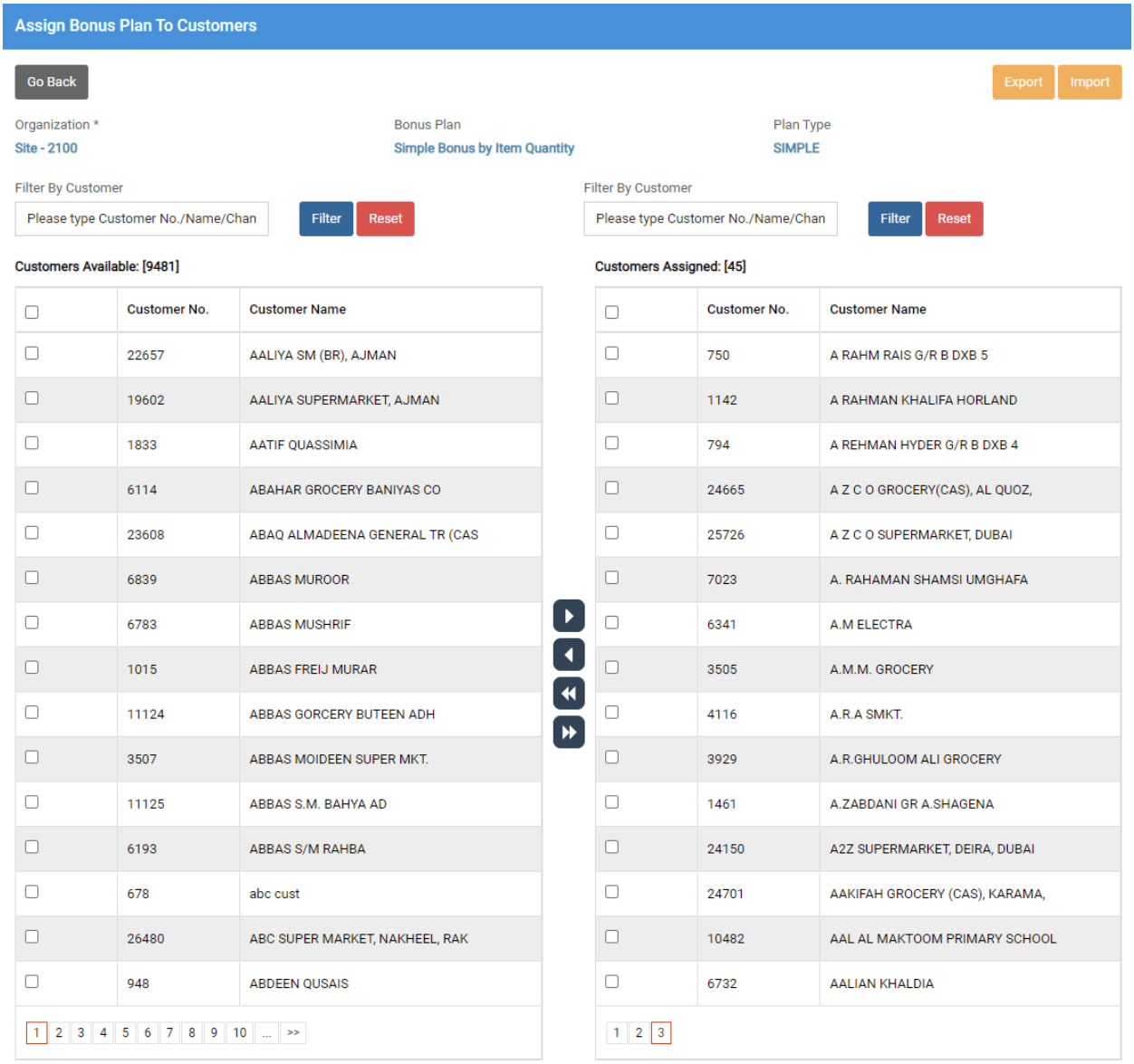
In order to assign a customer to a bonus plan, click on 'Assign Customers' in the table.



The customers assigned to the bonus plan will be displayed in the box to the right, whereas unassigned customers will be in the box to the left.

To assign a customer, select a customer in unassigned list and click on button.

To assign all the customers, click on button.

To unassign a customer, select the customer in the assigned list and click on button.

To unassign all the customers, click on button.

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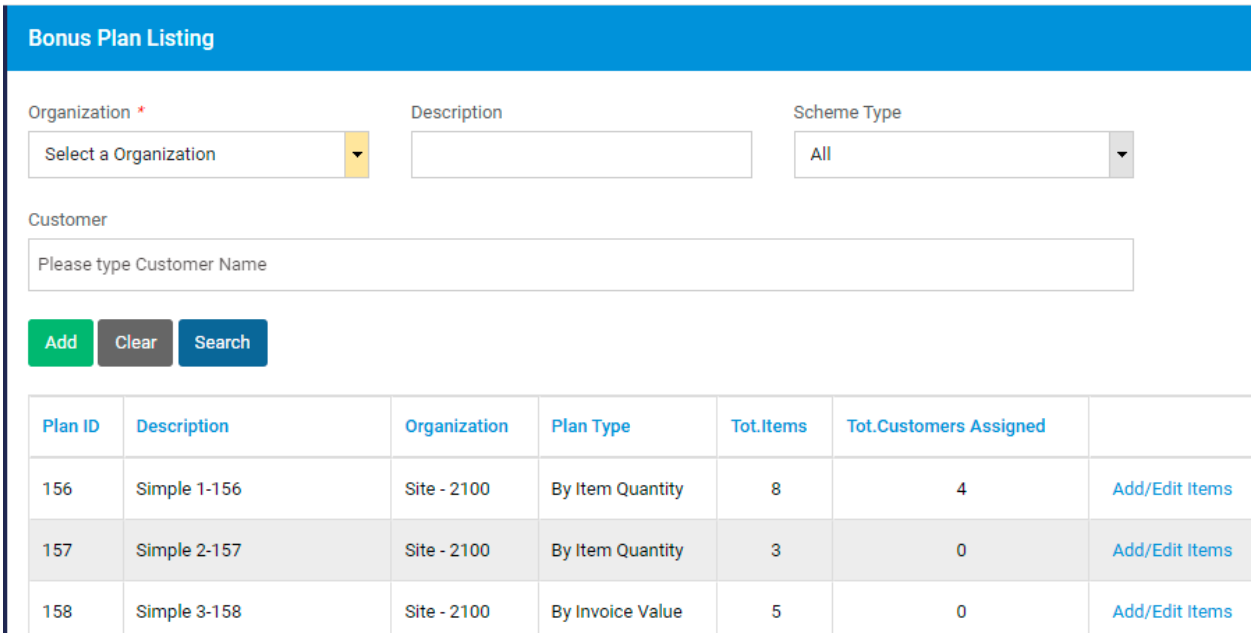
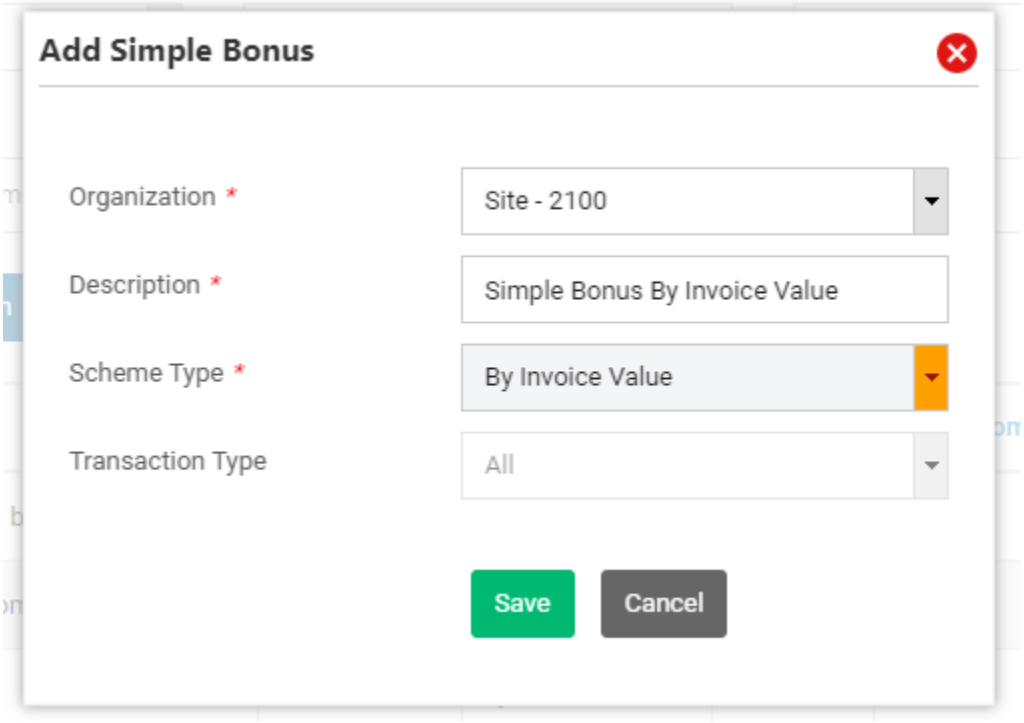
8.7.1.2 Simple Bonus by Invoice Value

In simple bonus by Invoice Value, you can set one bonus item against an invoice value. The bonus item will be applied when the customer places an order for the defined amount or more.



To create a new bonus plan, click on Add button. A pop up will be displayed.



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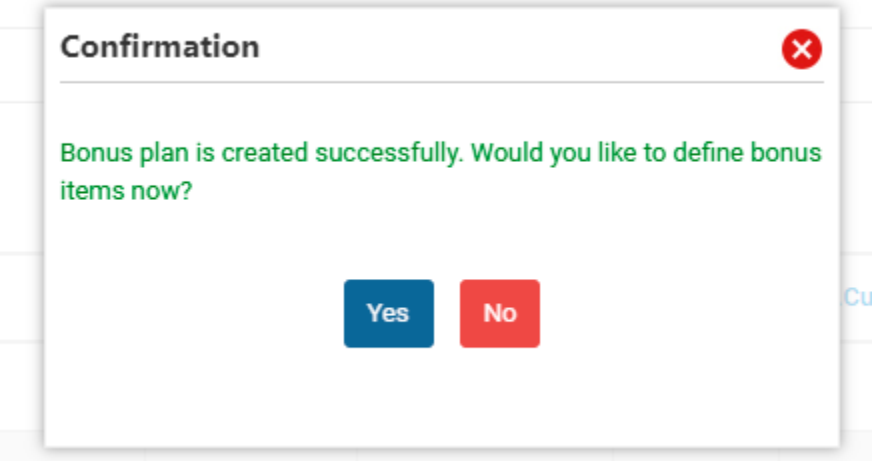
Select and Organization and enter the description of the bonus plan. Select Scheme Type as By Invoice Value.

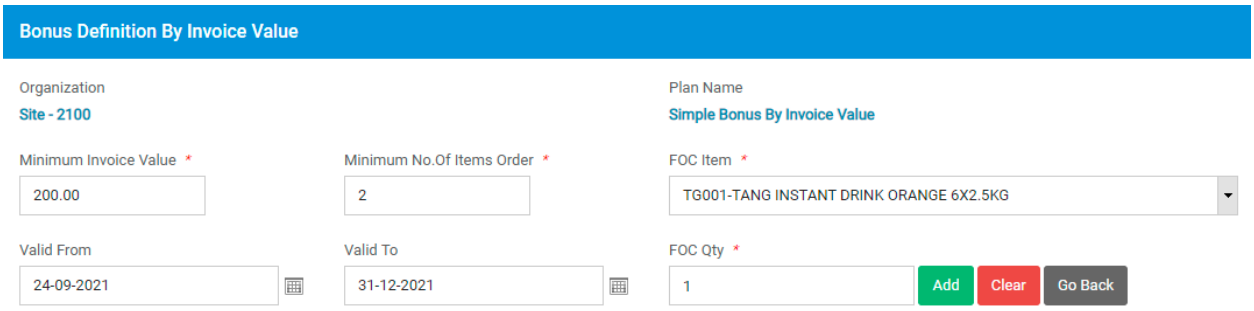
If transaction type is applicable, select the transaction type (CASH/CREDIT) from the dropdown.

Click on Save button to save the bonus plan definition.

Bonus plan will be created and a pop over will be displayed. If you wish to define the items that belong to bonus plan now, click on Yes button.



Screen to define the minimum order information and the bonus information will be displayed.



Enter the minimum order amount, minimum number of items that must be present in order. Select the FOC item, promotion validity period, and the FOC Quantity.

Click on Add to save the bonus slab.

The newly created slab will be added to the list of bonus slabs at the bottom of the screen.

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		Min.Invoice Value	Min.Ordered Items	FOC Item	FOC Qty	Apply Sequence	Valid From	Valid To
		500.00	3	CI051-MAZOLA BUTTER GHEE 12 X 1 L	1	1	29-Mar-2020	31-Dec-2100
		1,000.00	6	AA035-##ATKINS CUISINE FUSILLI 8X250GMS	2	2	29-Mar-2020	31-Dec-2100
		100.00	1	AA005-ATKINS ADV WHET/FIBR RYE CRACKER 15X100G	1	3	30-Mar-2020	31-Dec-2100
		3,000.00	5	AH066-###DATE CROWN CHOCODATES (DARK) 8X 200GM	2	4	01-Apr-2020	31-Dec-2100

Repeat the process to add more bonus slabs and bonus items.

Click on Go Back button to redirect to the Plan definition screen.

Plan ID	Description	Organization	Plan Type	Tot.Items	Tot.Customers Assigned			
205	Simple Bonus by Item Quantity	Site - 2100	By Item Quantity	1	0	Add/Edit Items	Assign Customers	Edit
204	December Promo 2021	Site - 2100	By Item Quantity	1	0	Add/Edit Items	Assign Customers	Edit

You can Add or edit the slabs later by clicking on 'Add/Edit Items' in the table.

In order to assign a customer to a bonus plan, click on 'Assign Customers' in the table.

Assign Bonus Plan To Customers

Go Back | Export | Import

Organization *
Site - 2100

Bonus Plan
Simple Bonus by Item Quantity

Plan Type
SIMPLE

Filter By Customer
Please type Customer No./Name/Chan | Filter | Reset

Filter By Customer
Please type Customer No./Name/Chan | Filter | Reset

Customers Available: [9481]

	Customer No.	Customer Name
	22657	AALIYA SM (BR), AJMAN
	19602	AALIYA SUPERMARKET, AJMAN
	1833	AATIF QUASSIMIA
	6114	ABAHAR GROCERY BANIYAS CO
	23608	ABAQ ALMADEENA GENERAL TR (CAS
	6839	ABBAS MUROOR
	6783	ABBAS MUSHRIF
	1015	ABBAS FREIJ MURAR
	11124	ABBAS GORCERY BUTEEN ADH
	3507	ABBAS MOIDEEN SUPER MKT.
	11125	ABBAS S.M. BAHYA AD

Customers Assigned: [45]

	Customer No.	Customer Name
	750	A RAHM RAIS G/R B DXB 5
	1142	A RAHMAN KHALIFA HORLAND
	794	A REHMAN HYDER G/R B DXB 4
	24665	A Z C O GROCERY(CAS), AL QUOZ,
	25726	A Z C O SUPERMARKET, DUBAI
	7023	A. RAHAMAN SHAMSI UMGHAFA
	6341	A.M ELECTRA
	3505	A.M.M. GROCERY
	4116	A.R.A SMKT.
	3929	A.R.GHULOOM ALI GROCERY
	1461	A.ZABDANI GR A.SHAGENA

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The customers assigned to the bonus plan will be displayed in the box to the right, whereas unassigned customers will be in the box to the left.

To assign a customer, select a customer in unassigned list and click on button.

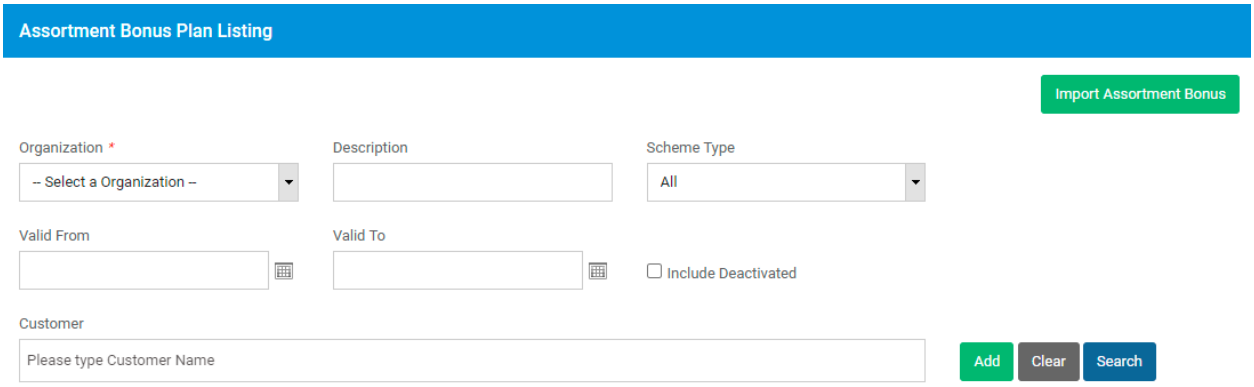
To assign all the customers, click on button.

To unassign a customer, select the customer in the assigned list and click on button.

To unassign all the customers, click on button.

8.7.2 Assortment Bonus Plan Listing

Assortment bonus plans can be created when a promotion is to be applied on an assorted set of items order items or bonus items.



8.7.2.1 Assortment Bonus by Overall Quantity

In Assortment bonus by overall quantity, a customer is eligible for FOC items when they buy one or more assorted products from Order Items List for defined number of units.

To create a new assortment bonus plan, click on Add button on the Plan listing screen.

A pop up will be displayed.

Select an organization and type in a description for the bonus plan. Select the Scheme type as 'Overall Quantity'. Select the promotion validity period. If transaction type is applicable for you, choose the transaction type also.

Click on Save button to create the assortment bonus plan by overall quantity.

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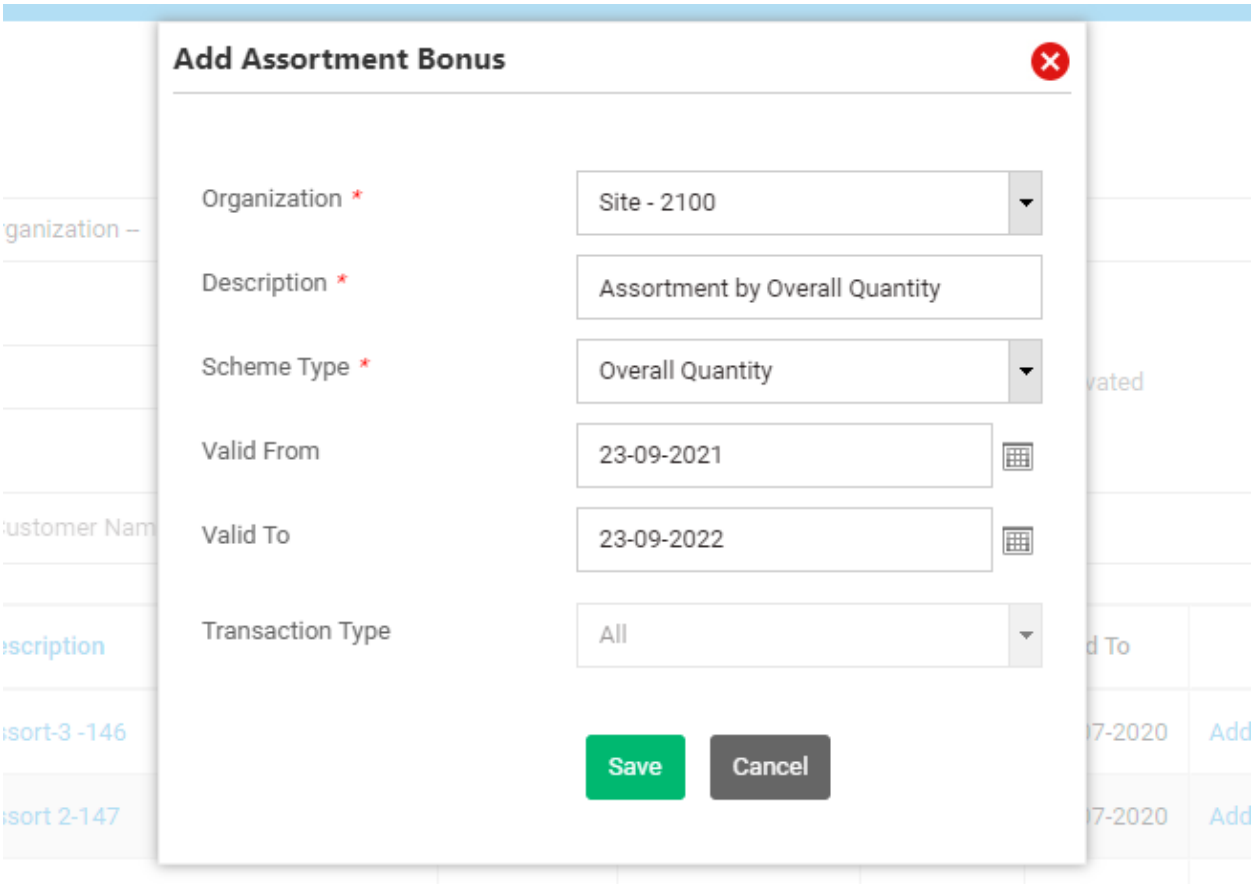
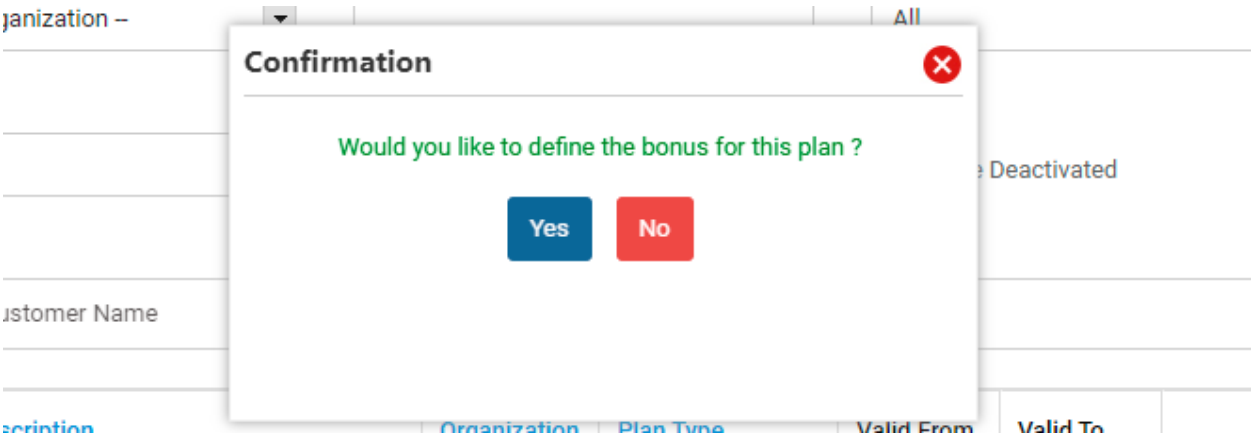


Once the bonus plan is saved, another pop up will be displayed. Click on Yes if you wish to define the bonus rules now.



Bonus rules definition screen will be displayed.

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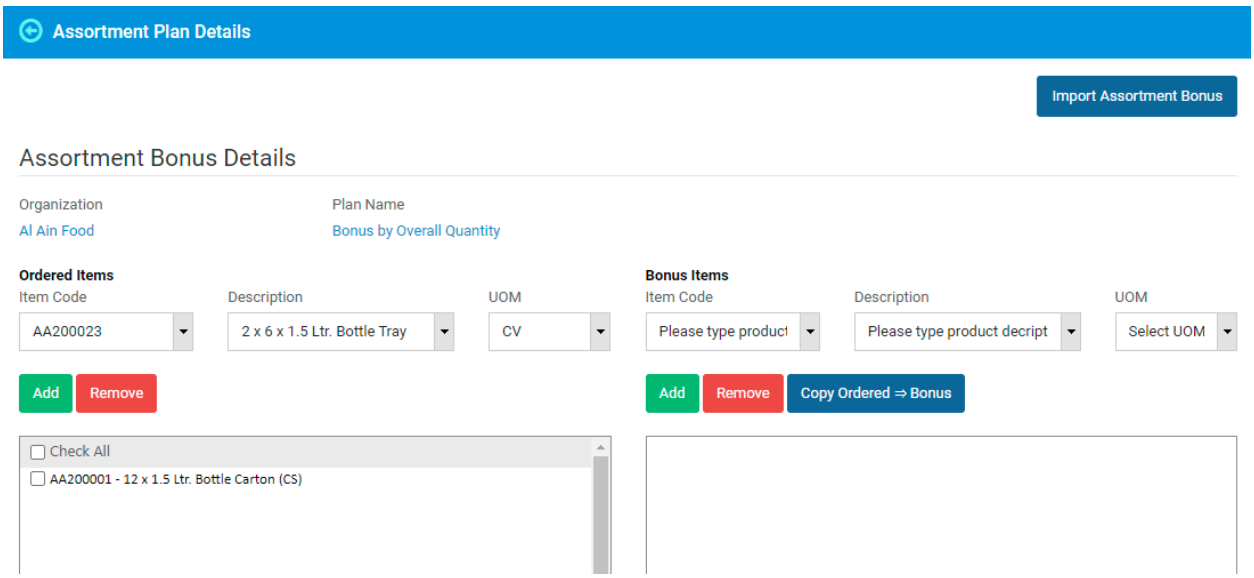


Add the order items and the corresponding UOM by selecting the item code or description of the item. Click on Add button to add it to order items list.

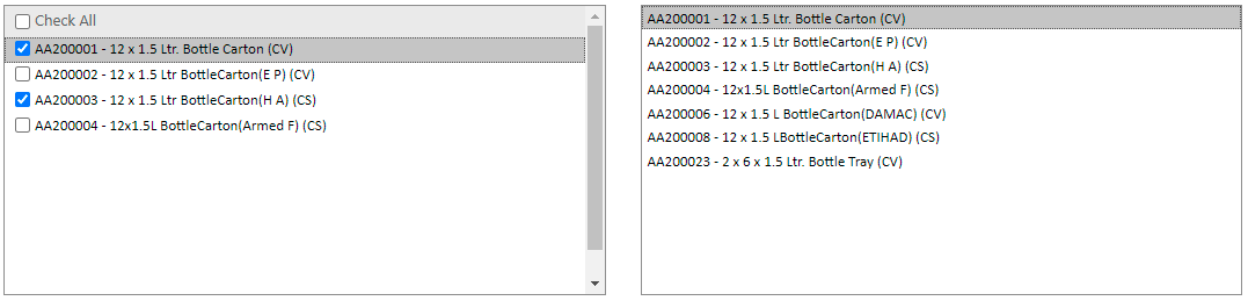
Continue the process of adding order items one after the other.

If any order item is to be set as mandatory item to be purchased, tick the checkbox against the order item.

Once the order items list is ready, you can start defining the Bonus items.

If the bonus items are same as order items, you can select the items from Order items list and then click on Copy Ordered => Bonus button.

If bonus items are different from order items, you can manually add the items and UOM to the bonus items section.



After the order items and bonus items are defined, you can define the slabs for bonuses at the bottom of the screen.

Enter the From Quantity, To Quantity, Bonus Type(POINT or RECURRING), and the Get Quantity.

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Bonus Rules

From Qty | To Qty | Type: POINT | Get Qty

Add Cancel

From Qty	To Qty	Type	Bonus Qty		
10	14	POINT	1.00		
15	45	RECURRING	2.00		
46	9999	RECURRING	10.00		

Confirm

Click on Add button to save a bonus slab. Continue the process of adding more slabs if required. Once the bonus slabs are defined and the bonus rules are defined completely, click on Confirm button.

The bonus plan and the corresponding rules will be saved.

You will be redirected to Bonus plan listing screen.

Plan ID	Description	Organization	Plan Type	Valid From	Valid To				
275	Bonus by Overall Quantity-275	Site - AAFB	Overall Quantity	23-09-2021	23-09-2022	Add/Edit Items	Assign Customers	Deactivate	Copy
274	TD Value Assorted-274	Site - AAFB	Overall Value	20-08-2021	20-08-2022	Add/Edit Items	Assign Customers	Deactivate	Copy

You can click on Add/Edit Items button to modify the existing bonus rules for the plan.

You can deactivate the bonus plan by clicking on Deactivate button. If you wish to copy and existing plan for a new set of dates, click on Copy button.

In order to assign a customer to a bonus plan, click on 'Assign Customers'.

The customers assigned to the bonus plan will be displayed in the box to the right, whereas unassigned customers will be in the box to the left.

To assign a customer, select a customer in unassigned list and click on button.

To assign all the customers, click on button.

To unassign a customer, select the customer in the assigned list and click on button.

To unassign all the customers, click on button.

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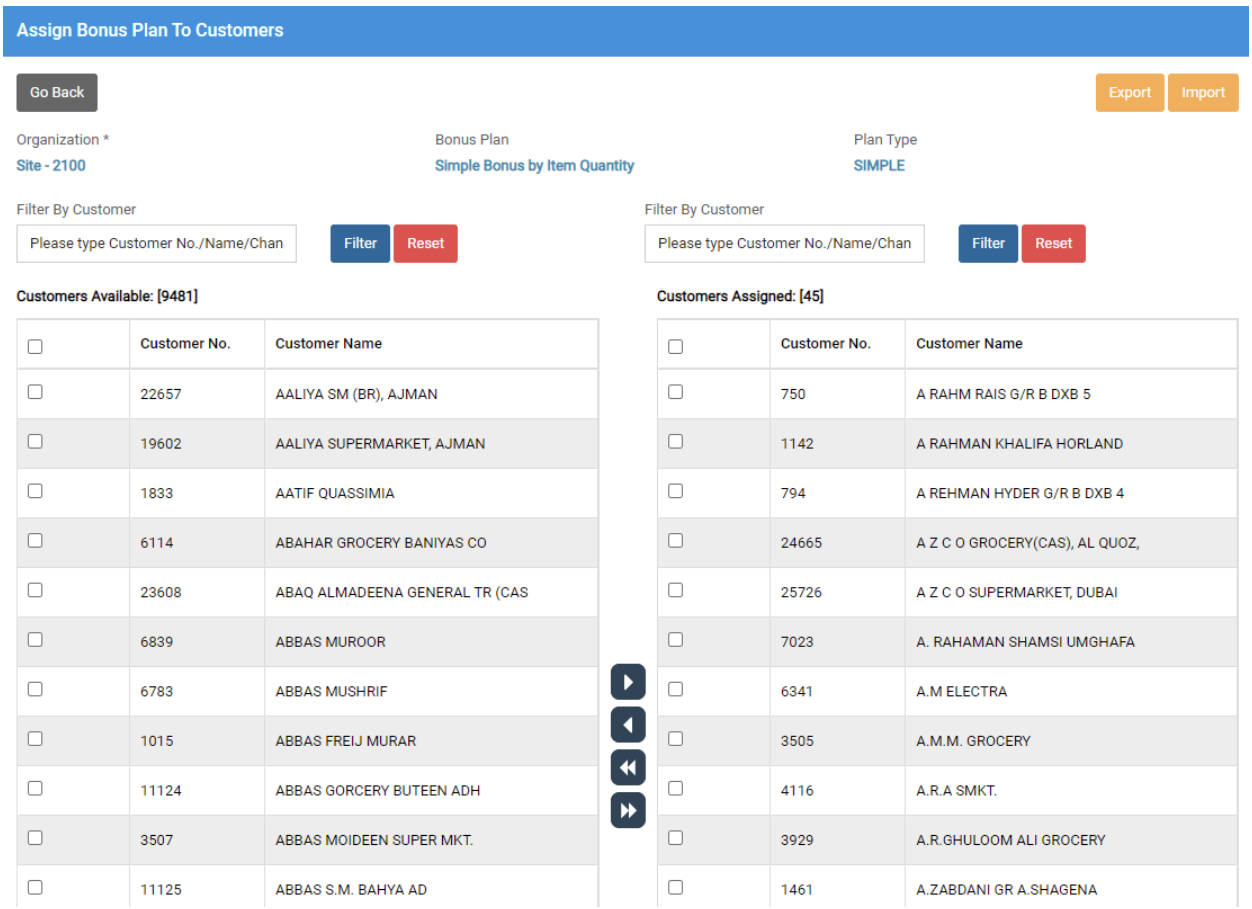

Customer No.	Customer Name
22657	AALIYA SM (BR), AJMAN
19602	AALIYA SUPERMARKET, AJMAN
1833	AATIF QUASSIMIA
6114	ABAHAR GROCERY BANIYAS CO
23608	ABAQ ALMADEENA GENERAL TR (CAS
6839	ABBAS MUROOR
6783	ABBAS MUSHRIF
1015	ABBAS FREIJ MURAR
11124	ABBAS GORCERY BUTEEN ADH
3507	ABBAS MOIDEEN SUPER MKT.
11125	ABBAS S.M. BAHYA AD

Customer No.	Customer Name
750	A RAHM RAIS G/R B DXB 5
1142	A RAHMAN KHALIFA HORLAND
794	A REHMAN HYDER G/R B DXB 4
24665	A Z C O GROCERY(CAS), AL QUOZ,
25726	A Z C O SUPERMARKET, DUBAI
7023	A. RAHAMAN SHAMSI UMGHAFA
6341	A.M ELECTRA
3505	A.M.M. GROCERY
4116	A.R.A SMKT.
3929	A.R.GHULOOM ALI GROCERY
1461	A.ZABDANI GR A.SHAGENA

8.7.2.2 Assortment Bonus by Minimum Quantity

In Assortment bonus by minimum quantity, a customer is eligible for FOC items when they buy each product in Order Items List for defined minimum number of units.

To create a new assortment bonus plan, click on Add button on the Plan listing screen.

A pop up will be displayed.

Select an organization and type in a description for the bonus plan. Select the Scheme type as 'Minimum Quantity'. Select the promotion validity period. If transaction type is applicable for you, choose the transaction type also.

Click on Save button to create the assortment bonus plan by minimum quantity.

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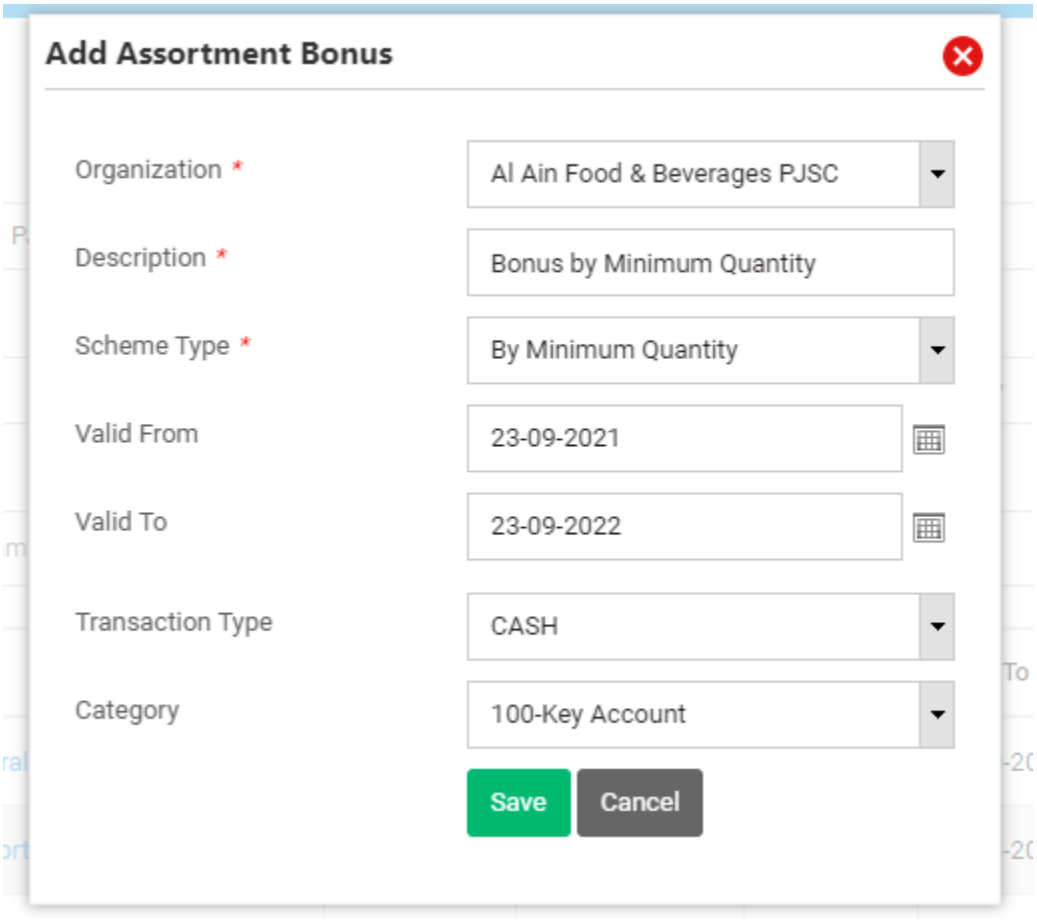
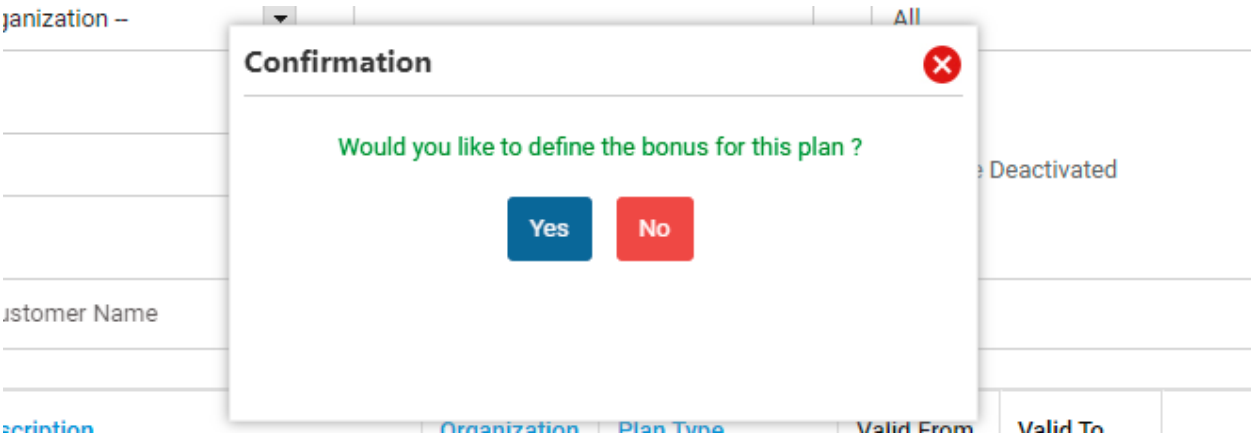


Once the bonus plan is saved, another pop up will be displayed. Click on Yes if you wish to define the bonus rules now.



Bonus rules definition screen will be displayed.

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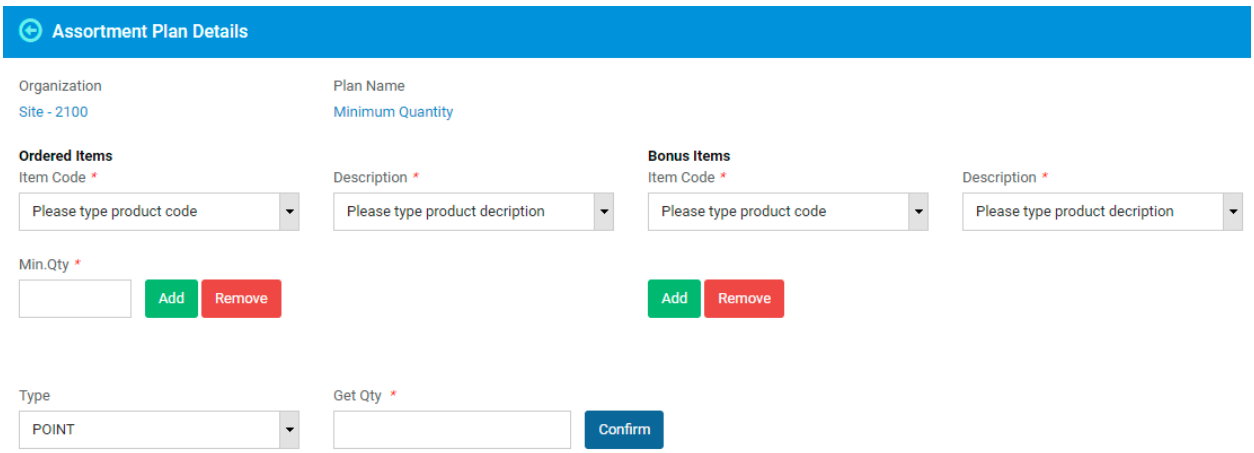
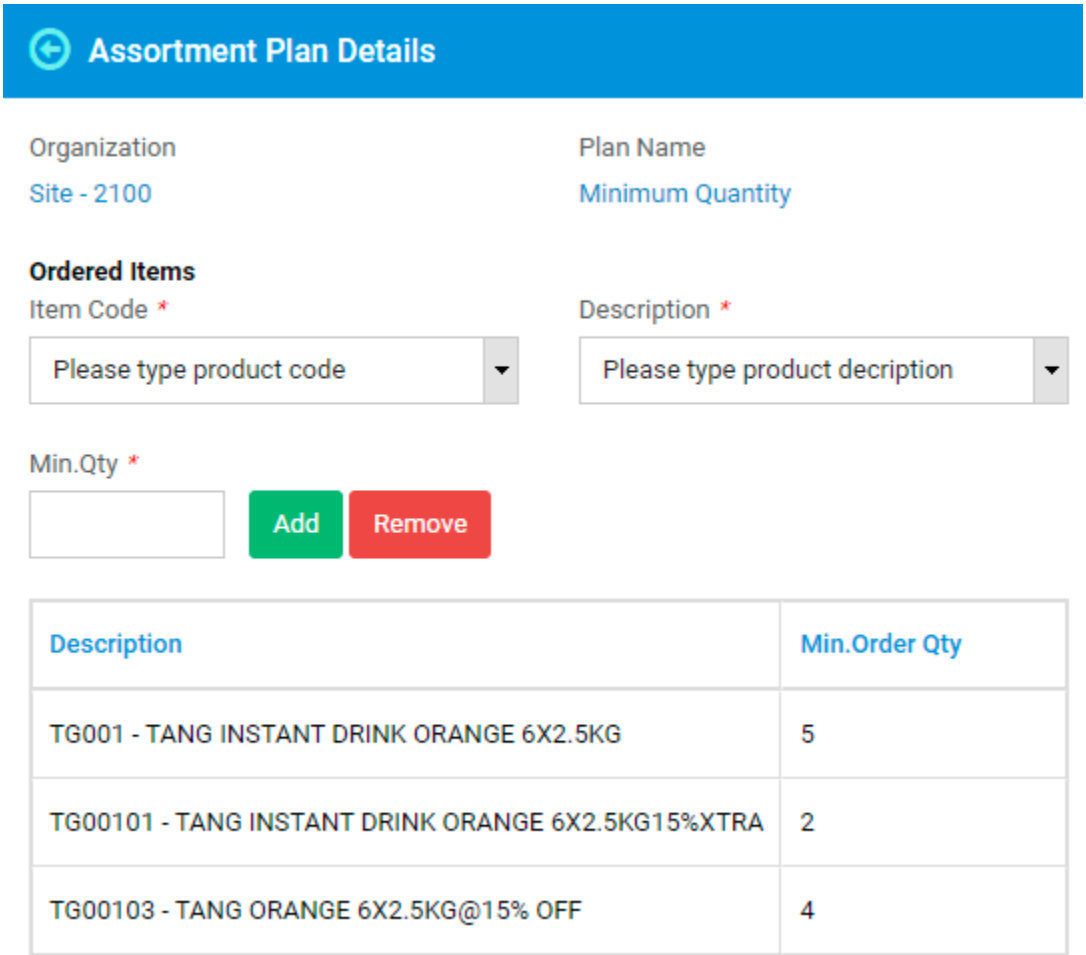


Select the order item by using item code or by item description. Enter the minimum order quantity against the order item. Click on Add button to add it to order items list.

Continue the process of adding more order items and their minimum order quantity.



After the order items are added, start adding the bonus items to the list.

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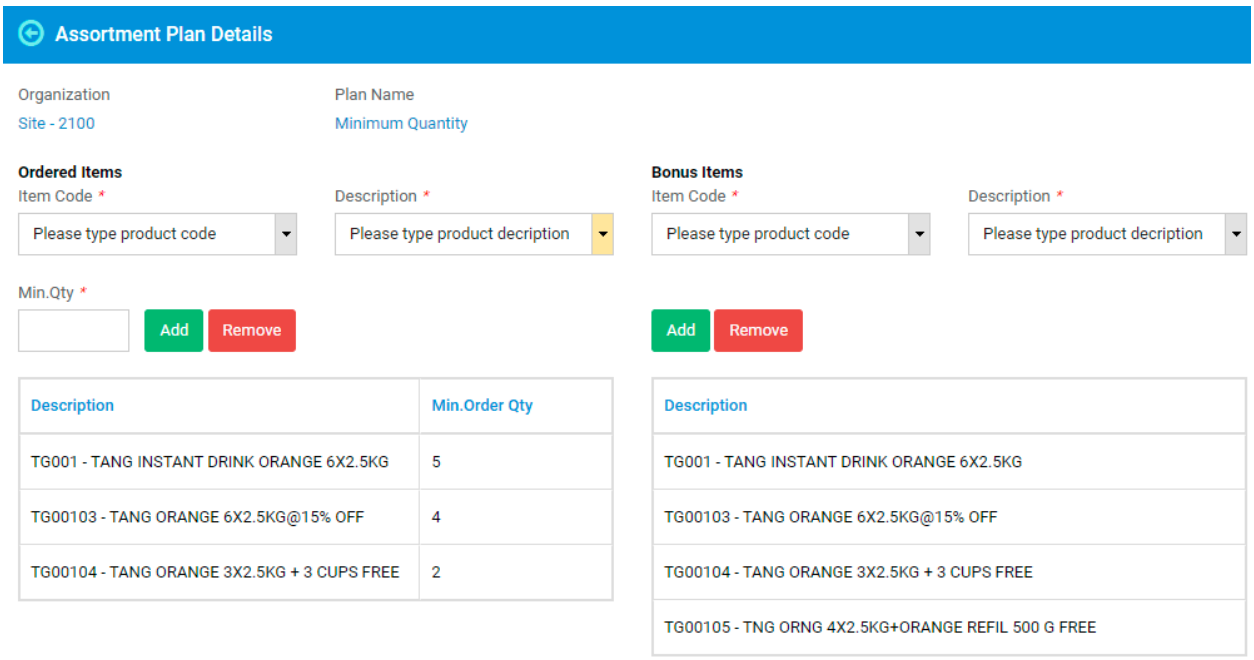
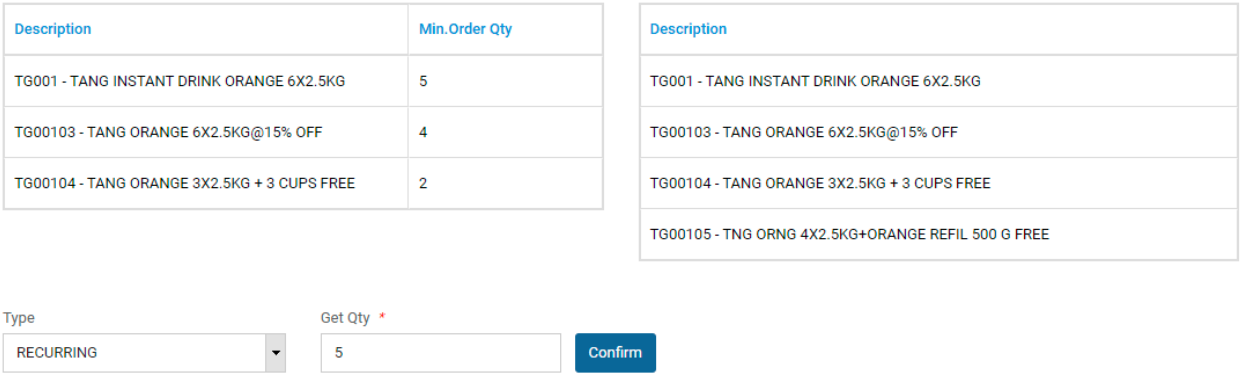


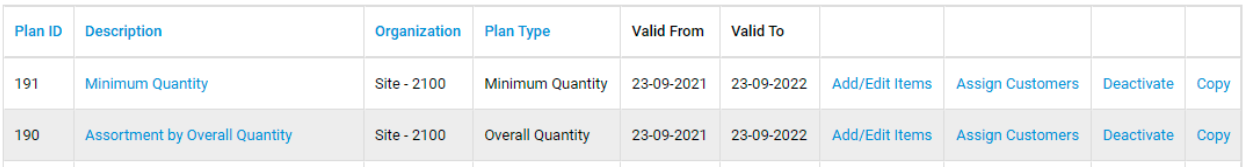
After the order items and bonus items are defined, you can define get quantity at the bottom of the screen.

Enter the Get Quantity of Bonus items.



Click on Confirm button. The bonus plan and the corresponding rules will be saved.

You will be redirected to Bonus plan listing screen.



Plan ID	Description	Organization	Plan Type	Valid From	Valid To				
191	Minimum Quantity	Site - 2100	Minimum Quantity	23-09-2021	23-09-2022	Add/Edit Items	Assign Customers	Deactivate	Copy
190	Assortment by Overall Quantity	Site - 2100	Overall Quantity	23-09-2021	23-09-2022	Add/Edit Items	Assign Customers	Deactivate	Copy

You can click on Add/Edit Items button to modify the existing bonus rules for the plan.

You can deactivate the bonus plan by clicking on Deactivate button. If you wish to copy and existing plan for a new set of dates, click on Copy button.

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In order to assign a customer to a bonus plan, click on 'Assign Customers'.

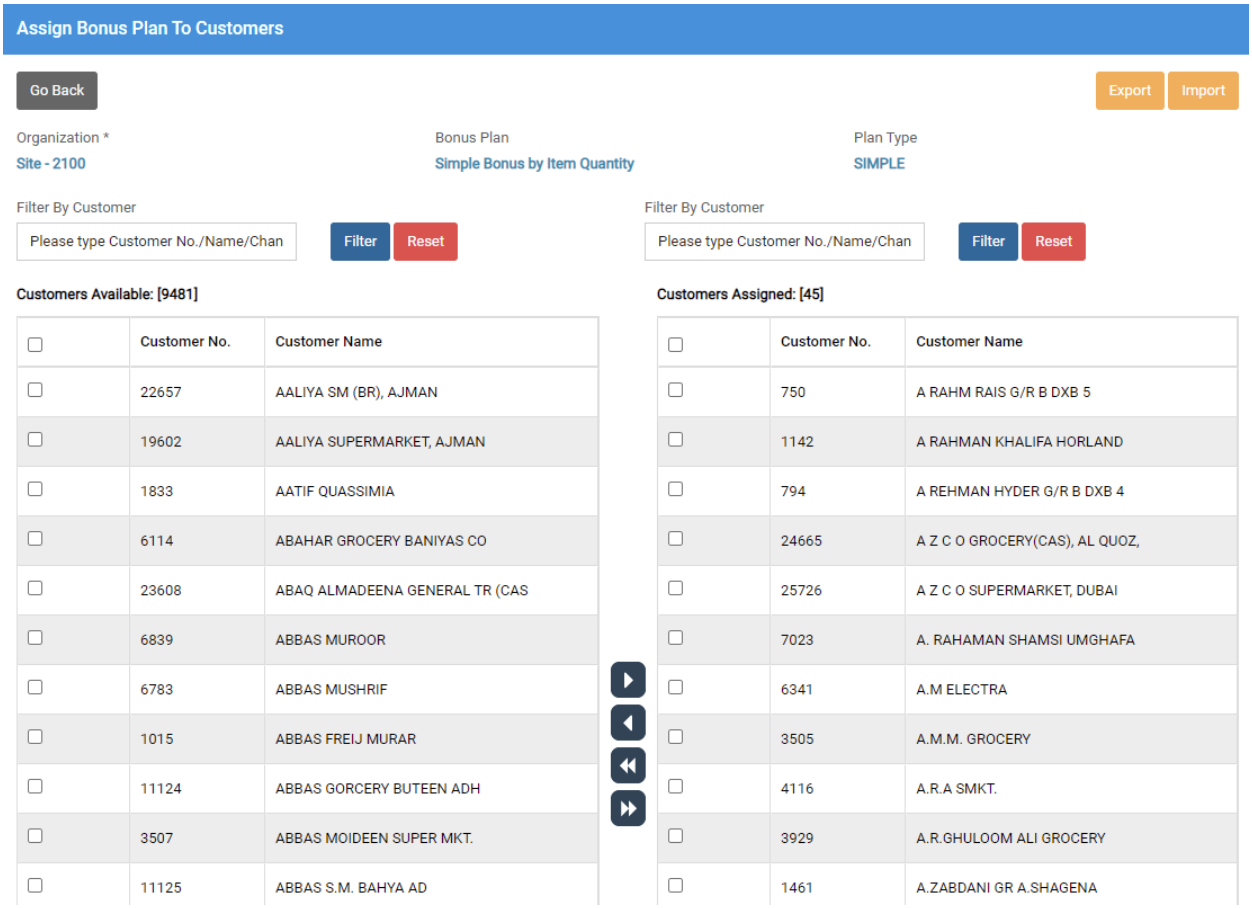
The customers assigned to the bonus plan will be displayed in the box to the right, whereas unassigned customers will be in the box to the left.

To assign a customer, select a customer in unassigned list and click on button.

To assign all the customers, click on button.

To unassign a customer, select the customer in the assigned list and click on button.

To unassign all the customers, click on button.



8.7.2.3 Assortment Bonus by Overall Value

In Assortment bonus by overall quantity, a customer is eligible for FOC items when they buy one or more products in Order Items List for defined value or higher.

To create a new assortment bonus plan, click on Add button on the Plan listing screen.

A pop up will be displayed.

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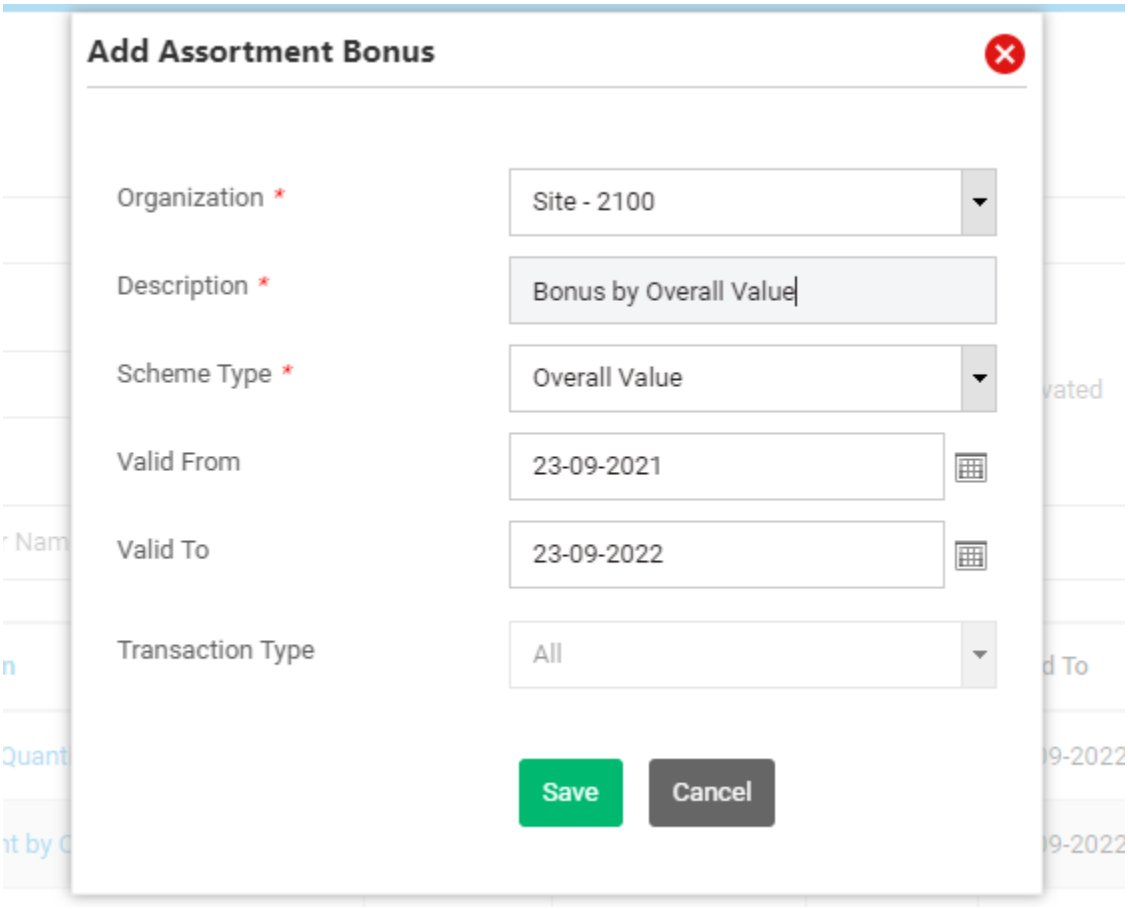
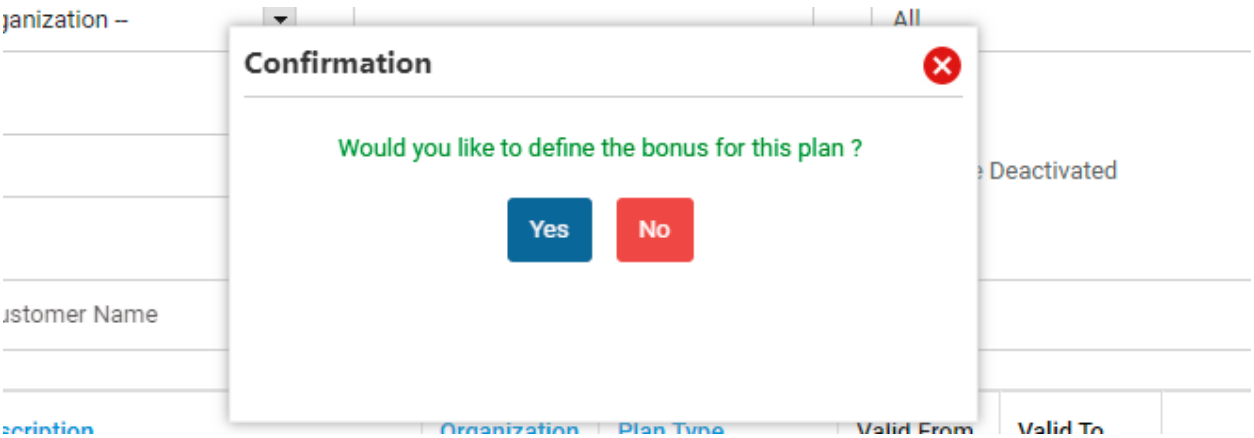
Select an organization and type in a description for the bonus plan. Select the Scheme type as 'Overall Value. Select the promotion validity period. If transaction type is applicable for you, choose the transaction type also.

Click on Save button to create the assortment bonus plan by overall value.



Once the bonus plan is saved, another pop up will be displayed. Click on Yes if you wish to define the bonus rules now.



Bonus rules definition screen will be displayed.

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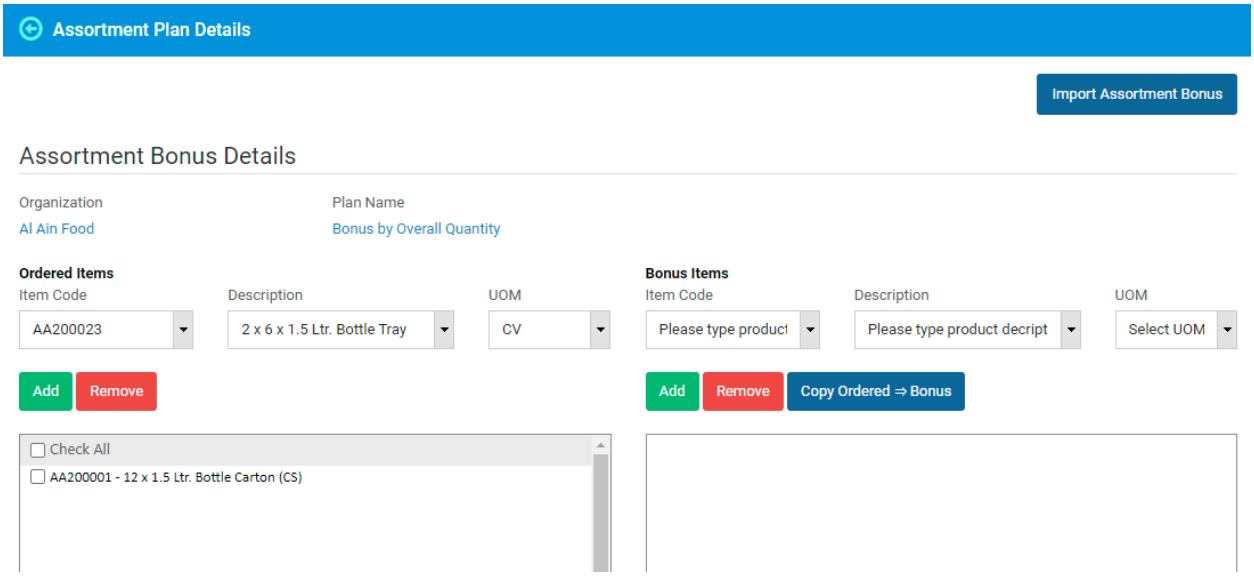


Add the order items and the corresponding UOM by selecting the item code or description of the item. Click on Add button to add it to order items list.

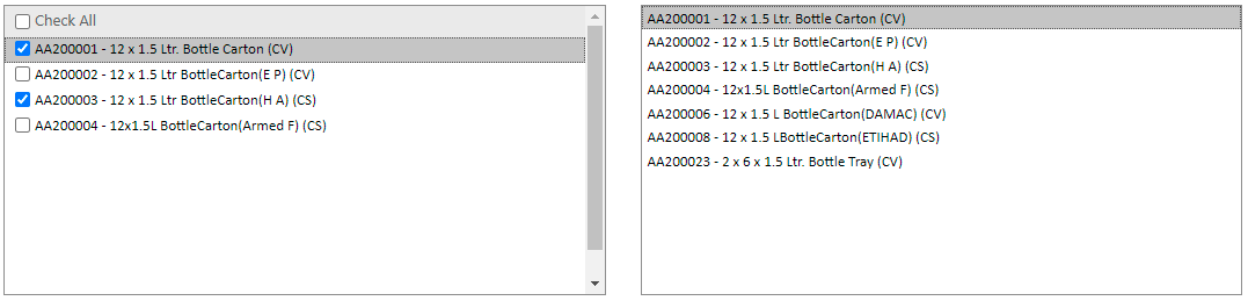
Continue the process of adding order items one after the other.

If any order item is to be set as mandatory item to be purchased, tick the checkbox against the order item.

Once the order items list is ready, you can start defining the Bonus items.

If the bonus items are same as order items, you can select the items from Order items list and then click on Copy Ordered => Bonus button.

If bonus items are different from order items, you can manually add the items and UOM to the bonus items section.



After the order items and bonus items are defined, you can define the slabs for bonuses at the bottom of the screen.

Enter the From Quantity, To Quantity, Bonus Type(POINT or RECURRING), and the Get Quantity.

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Bonus Rules

From Value | To Value | Type: POINT | Get Qty

Add | Cancel

From Value	To Value	Type	Bonus Qty		
100.00	199.00	POINT	5.00		
200.00	299.00	POINT	10.00		
300.00	10,000.00	RECURRING	25.00		

Confirm

Click on Add button to save a bonus slab. Continue the process of adding more slabs if required. Once the bonus slabs are defined and the bonus rules are defined completely, click on Confirm button.

The bonus plan and the corresponding rules will be saved.

You will be redirected to Bonus plan listing screen.

Plan ID	Description	Organization	Plan Type	Valid From	Valid To				
275	Bonus by Overall Quantity-275	Site - AAFB	Overall Quantity	23-09-2021	23-09-2022	Add/Edit Items	Assign Customers	Deactivate	Copy
274	TD Value Assorted-274	Site - AAFB	Overall Value	20-08-2021	20-08-2022	Add/Edit Items	Assign Customers	Deactivate	Copy

You can click on Add/Edit Items button to modify the existing bonus rules for the plan.

You can deactivate the bonus plan by clicking on Deactivate button. If you wish to copy and existing plan for a new set of dates, click on Copy button.

In order to assign a customer to a bonus plan, click on 'Assign Customers'.

The customers assigned to the bonus plan will be displayed in the box to the right, whereas unassigned customers will be in the box to the left.

To assign a customer, select a customer in unassigned list and click on button.

To assign all the customers, click on button.

To unassign a customer, select the customer in the assigned list and click on button.

To unassign all the customers, click on button.

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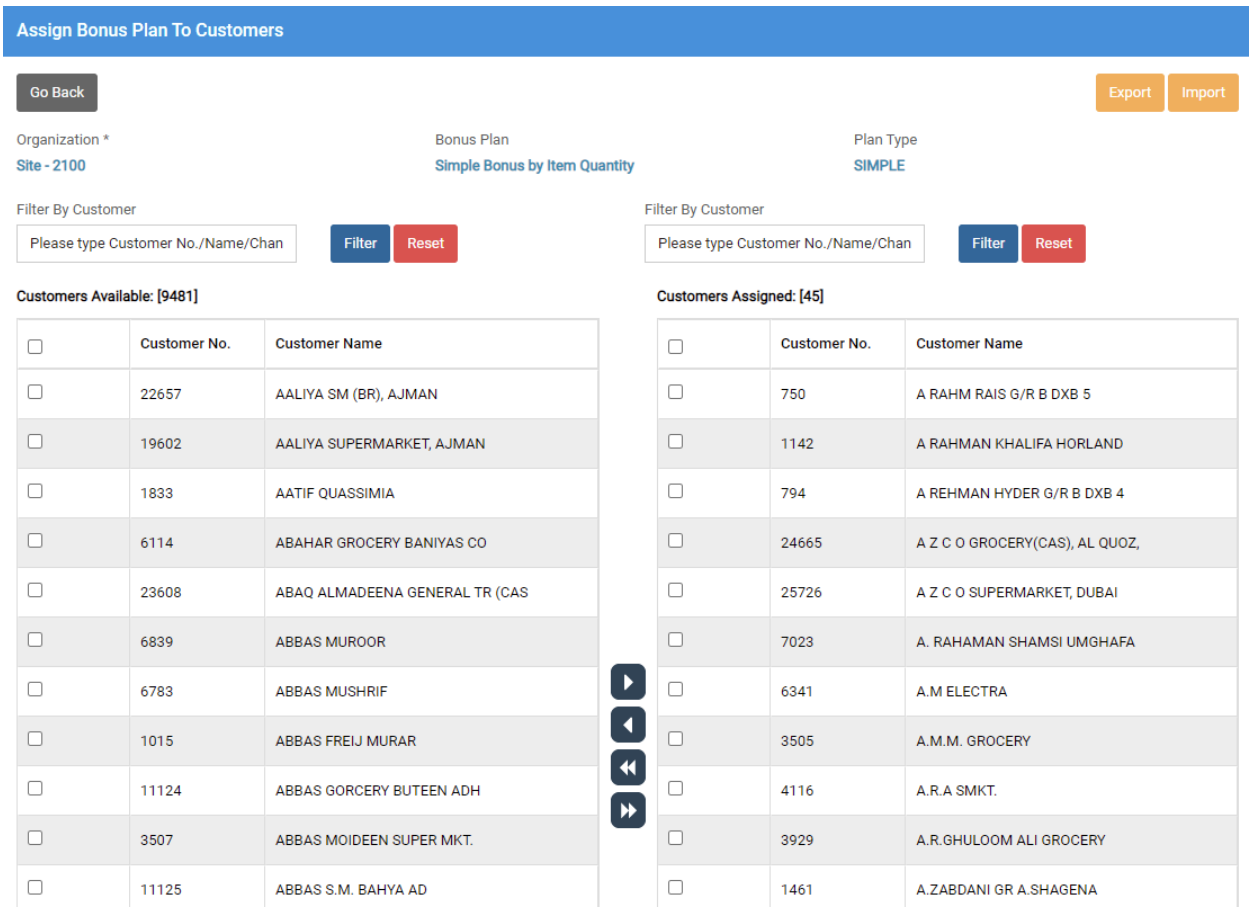

8.7.2.4 Overlapping Quantity and Value based assortment bonus

Create an assortment bonus plan with Scheme Type as ‘Overall Quantity’.

Assign it to one or more Channels (Category).

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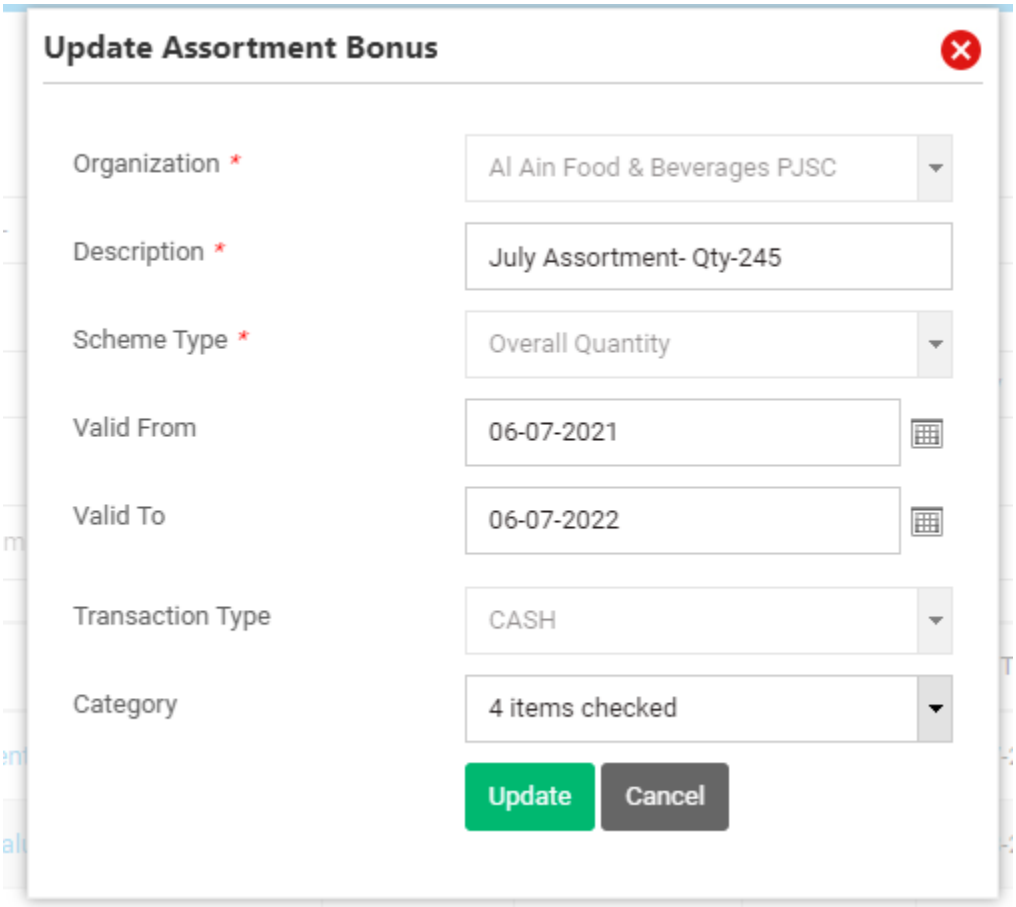

Add one or more items to this bonus plan and save it.

Create one more assortment bonus plan by selecting 'Overall Value' against scheme type.

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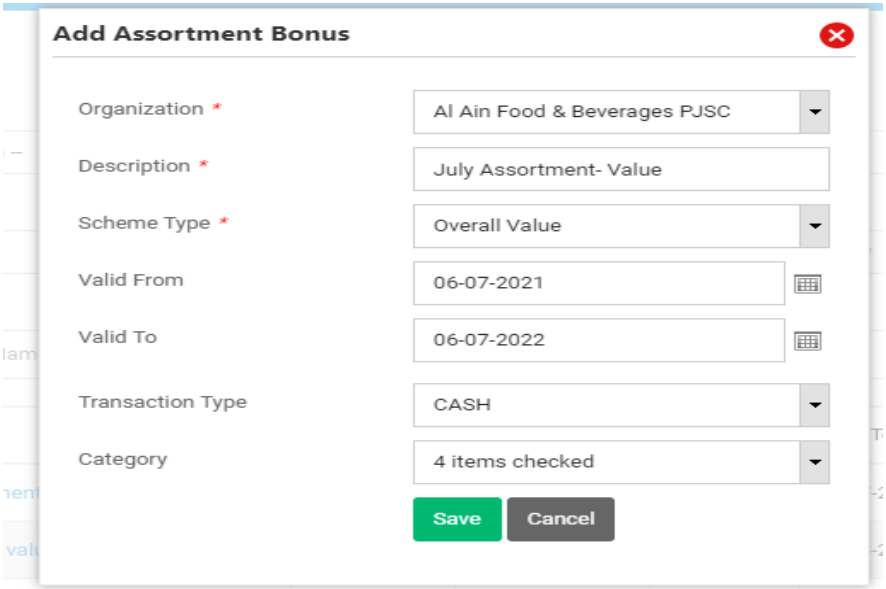
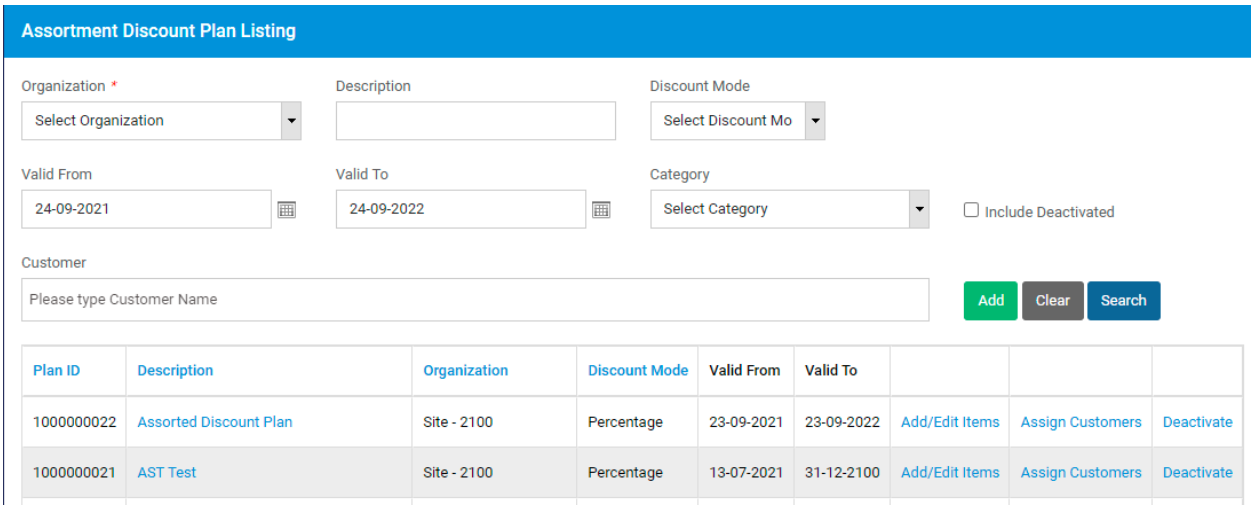
Assign this bonus plan to one or more channels. Add items to this bonus plan which contain one or more items which are part of quantity-based assortment bonus plan.



Identify a suitable van who has a customer which belongs to the channel that is eligible for both bonus plans.

8.7.3 Assortment Discount Plan Listing

Using Assortment Discount Plans, customer will become eligible for a discount when a slab is satisfied by buying the assorted qualified items.



To create a new Assorted discount plan, click on Add button. A pop up will be displayed.

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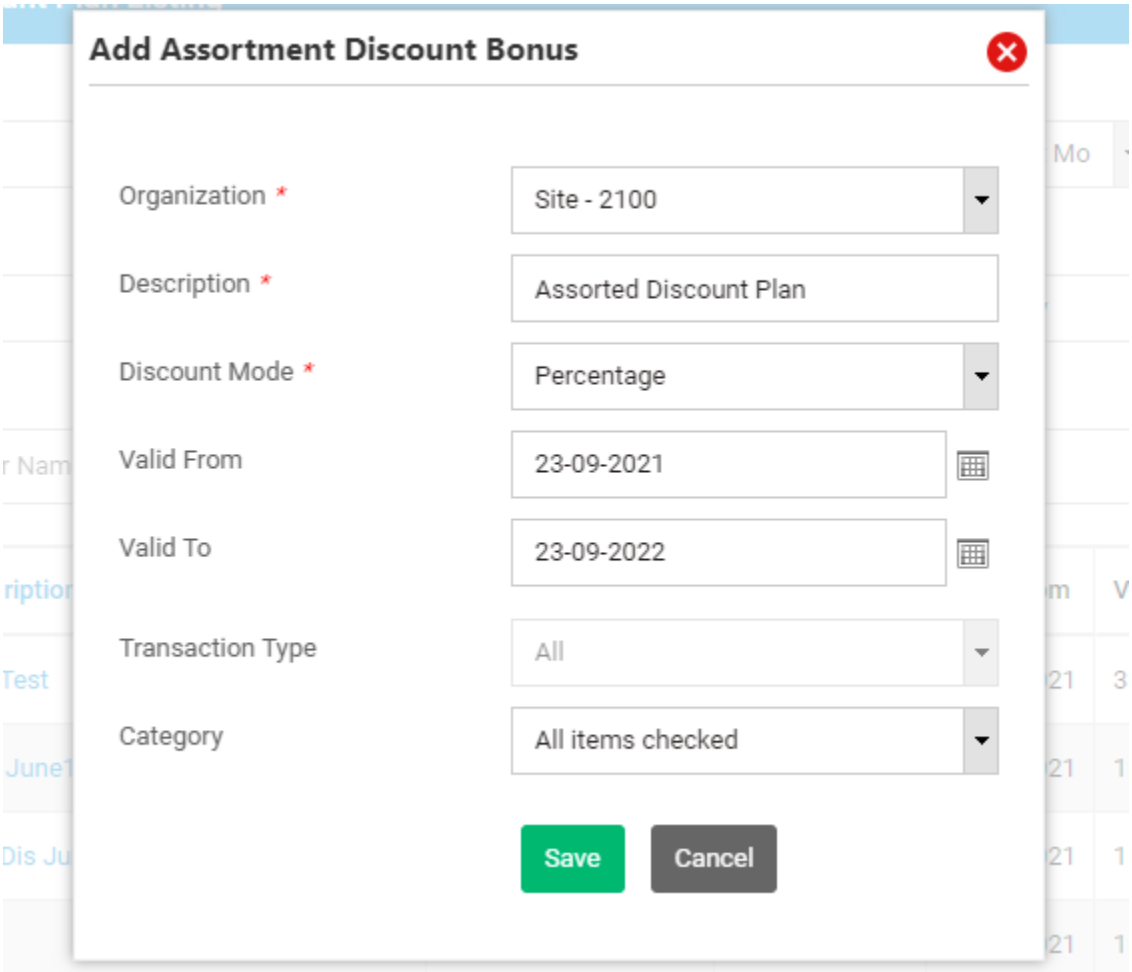
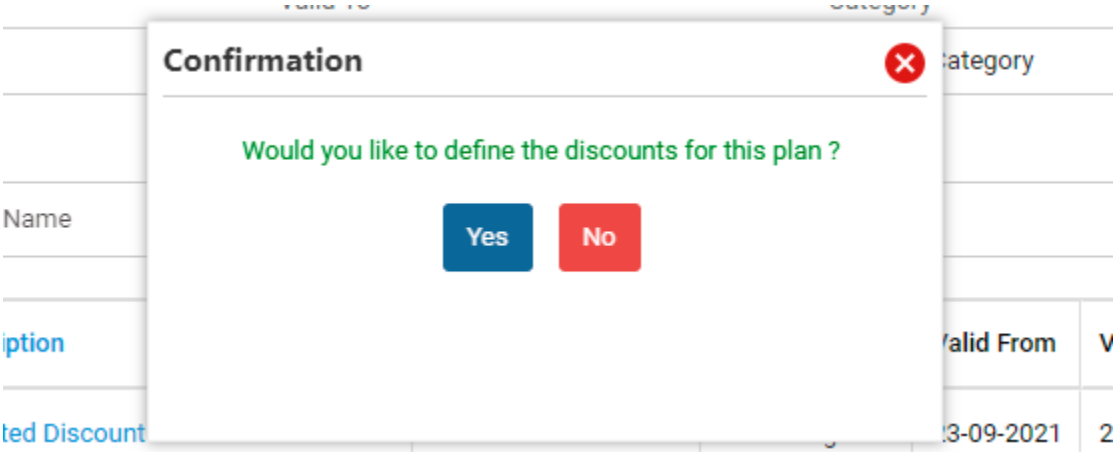


Select an organization and enter a description for the bonus plan.

Select a discount mode. Discount mode can be either Value or Percentage. It defines how the discount will be applied.

Select the promotion validity period and transaction type if applicable. Click on Save button to Save the bonus plan.



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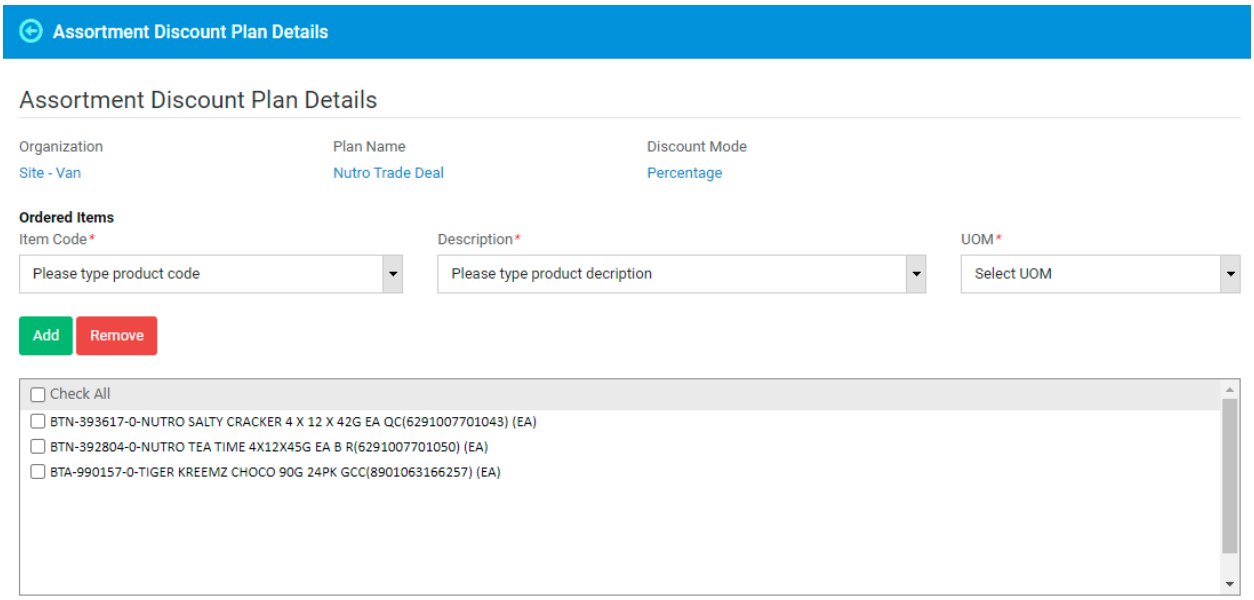
A message will be displayed. If you wish to set up the bonus rules now, click on Yes button.

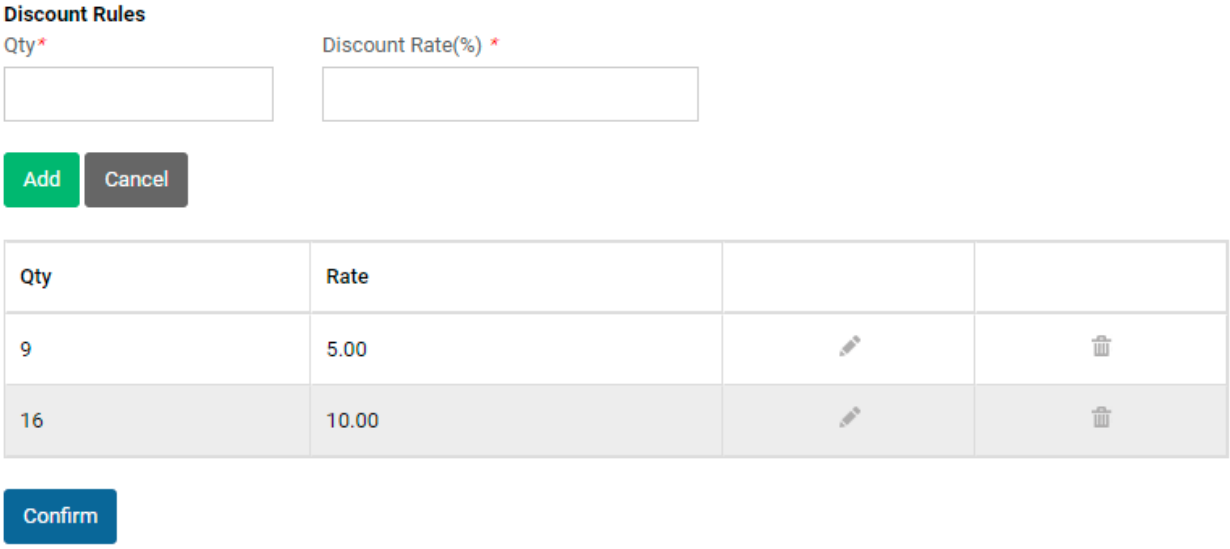


Bonus rules set up screen will be displayed.

Select the order item using item code or item description, and select the UOM of product. Click on Add button to add the item to Ordered items list.

Continue the process of adding more items until all the items are added.

In the bottom of the screen, slabs definition section will be available.



Enter the Order Quantity and Discount Rate. Click on Add button to add the slab. Continue adding the slabs.

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Click on Confirm button after all the slabs are added. Bonus plan will be saved, and you will be redirected to bonus listing screen.

Plan ID	Description	Organization	Discount Mode	Valid From	Valid To		
2	Dummy Plan	Site - Van	Percentage	24-09-2021	24-09-2021	Add/Edit Items	Deactivate
1	Nutro Trade Deal	Site - Van	Percentage	24-09-2021	24-09-2021	Add/Edit Items	Deactivate

You can click on Add/Edit Items button to modify the existing bonus rules for the plan.

You can deactivate the bonus plan by clicking on Deactivate button. If you wish to copy and existing plan for a new set of dates, click on Copy button.

In order to assign a customer to a bonus plan, click on 'Assign Customers'.

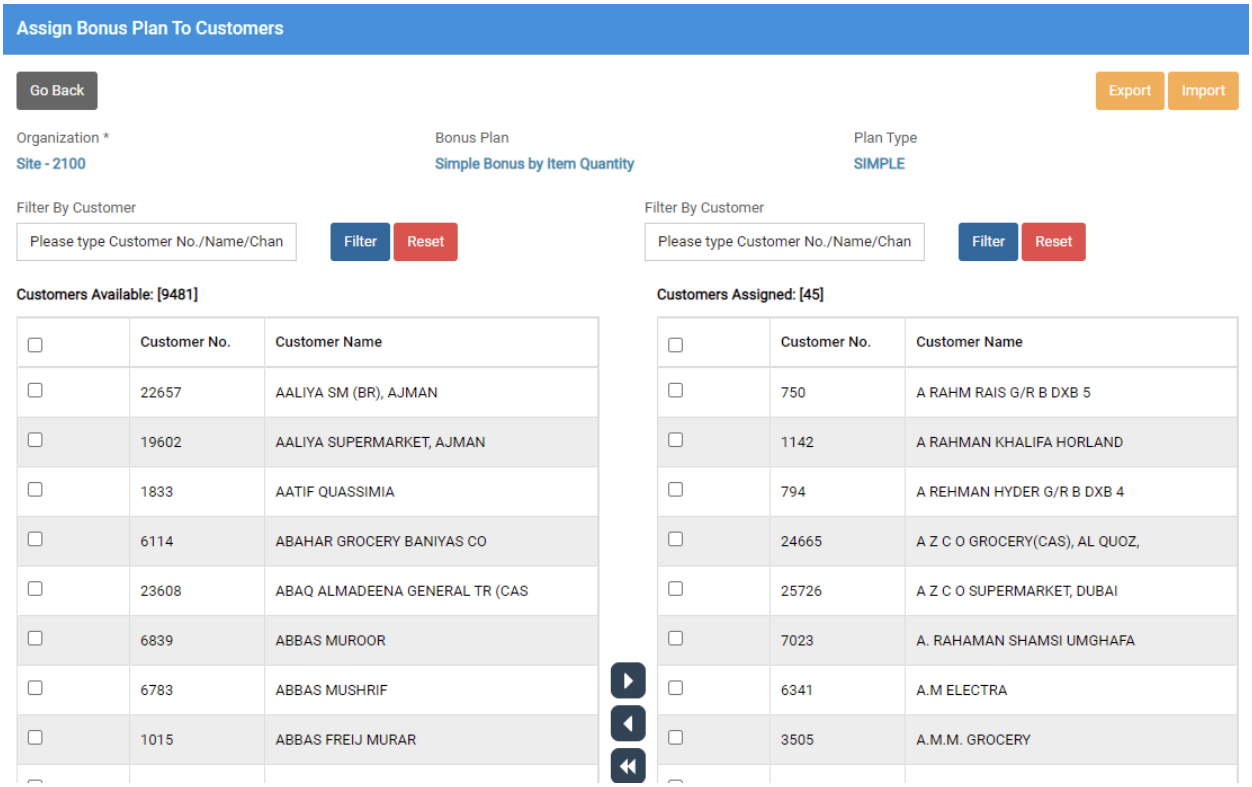
The customers assigned to the bonus plan will be displayed in the box to the right, whereas unassigned customers will be in the box to the left.

To assign a customer, select a customer in unassigned list and click on button.

To assign all the customers, click on button.

To unassign a customer, select the customer in the assigned list and click on button.

To unassign all the customers, click on button.



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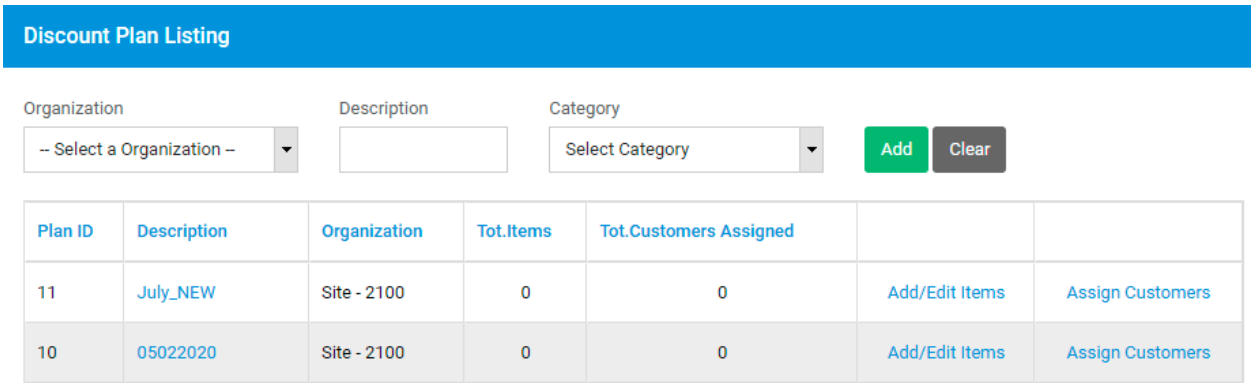
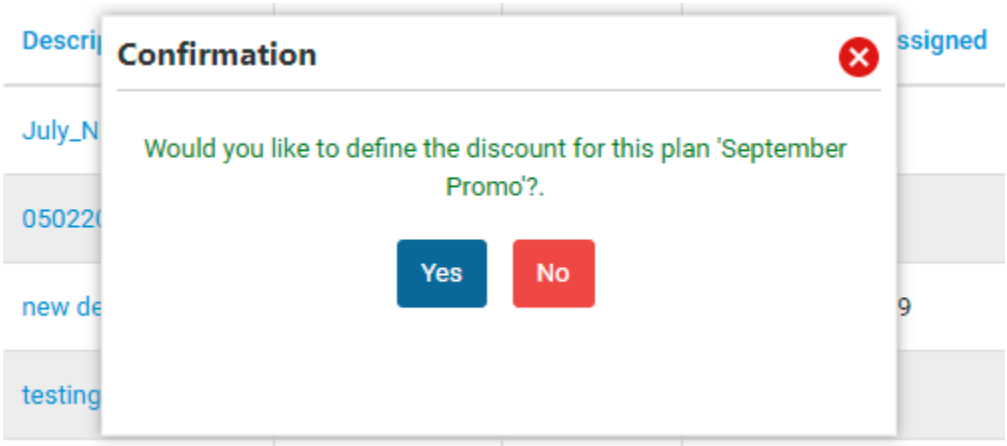
8.7.4 Discount Definition

Using the Discount definition screen, you will be able to define discount plans for items.

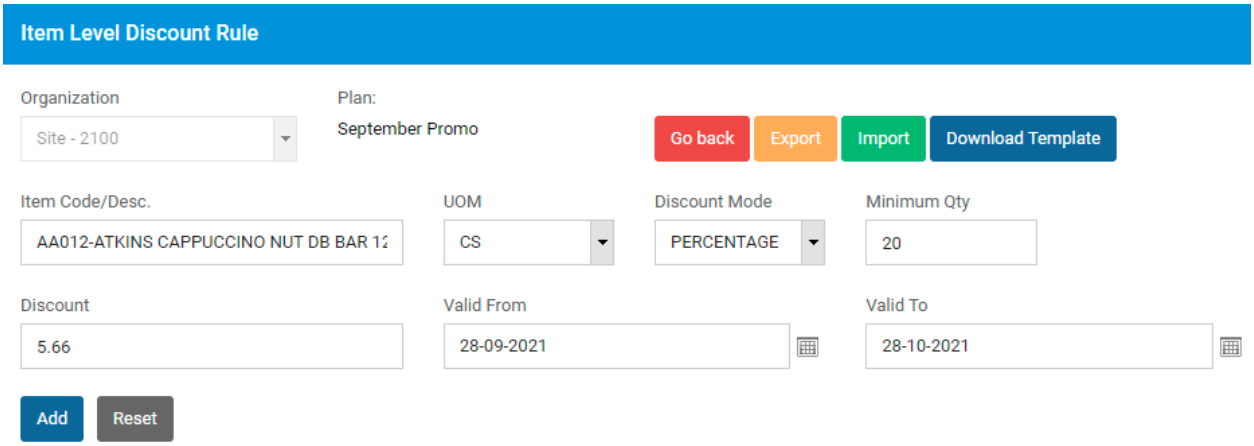


To create a new discount plan, select an organization and enter the description of the plan name. Click on Add button. Plan will be created and a message will be displayed.



Click on Yes if you wish to define the discount rules now.

Discount rule definition screen will be displayed.



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Select the item and UOM, choose the discount mode- VALUE or PERCENTAGE, and enter the minimum quantity. Enter the discount and provide the validity period.

Once the required information is provided, click on Add button.

The added rules will be added to the list on the bottom of the screen.

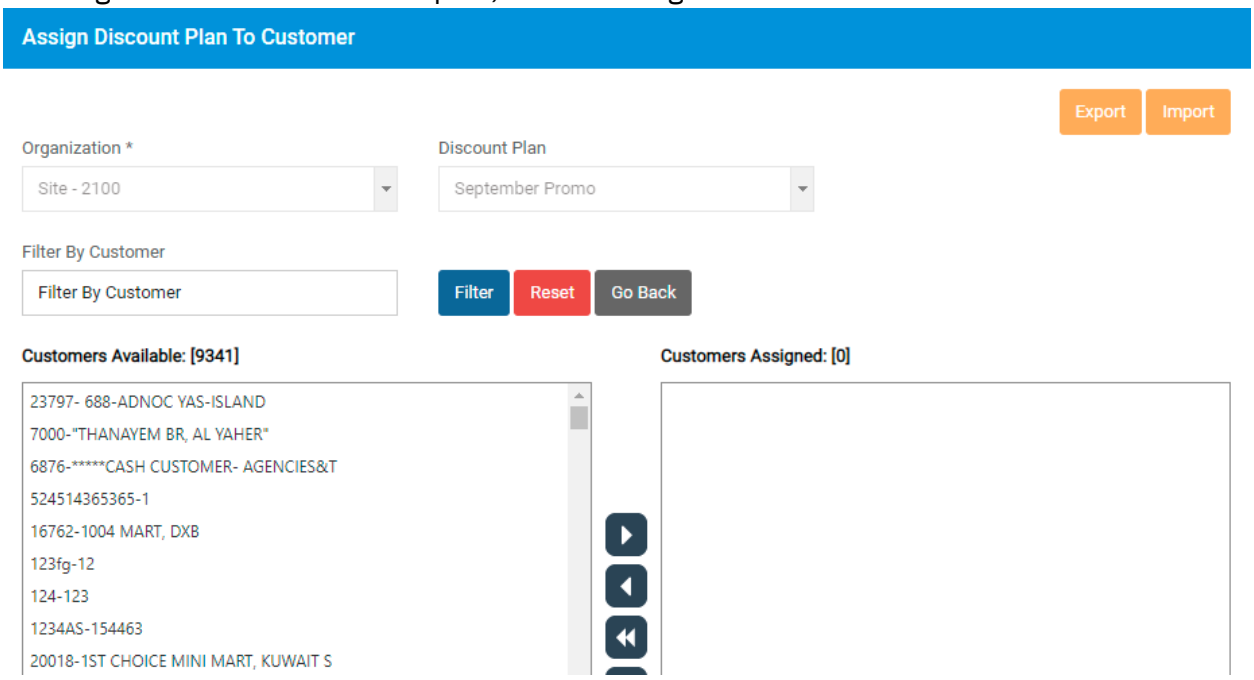
Item Code	Description	UOM	Discount Mode	From Qty	Value	Valid From	Valid To		
AA003	ATKINS CHOC BROWNIE BAR 12X15X60G	CS	PERCENTAGE	15	4.00	09-28-2021	10-28-2021		
AA012	ATKINS CAPPUCCINO NUT DB BAR 12X15X37G	CS	PERCENTAGE	20	5.66	09-28-2021	10-28-2021		

You can also import the discount rules using an excel file by clicking on Import button.

Click on Go back button to go to plan definition screen.

To edit an existing discount plan, click on Add/Edit items button.

To assign customers to discount plan, click on Assign Customers button.



The customers assigned to the bonus plan will be displayed in the box to the right, whereas unassigned customers will be in the box to the left.

To assign a customer, select a customer in unassigned list and click on button.

To assign all the customers, click on button.

To unassign a customer, select the customer in the assigned list and click on button.

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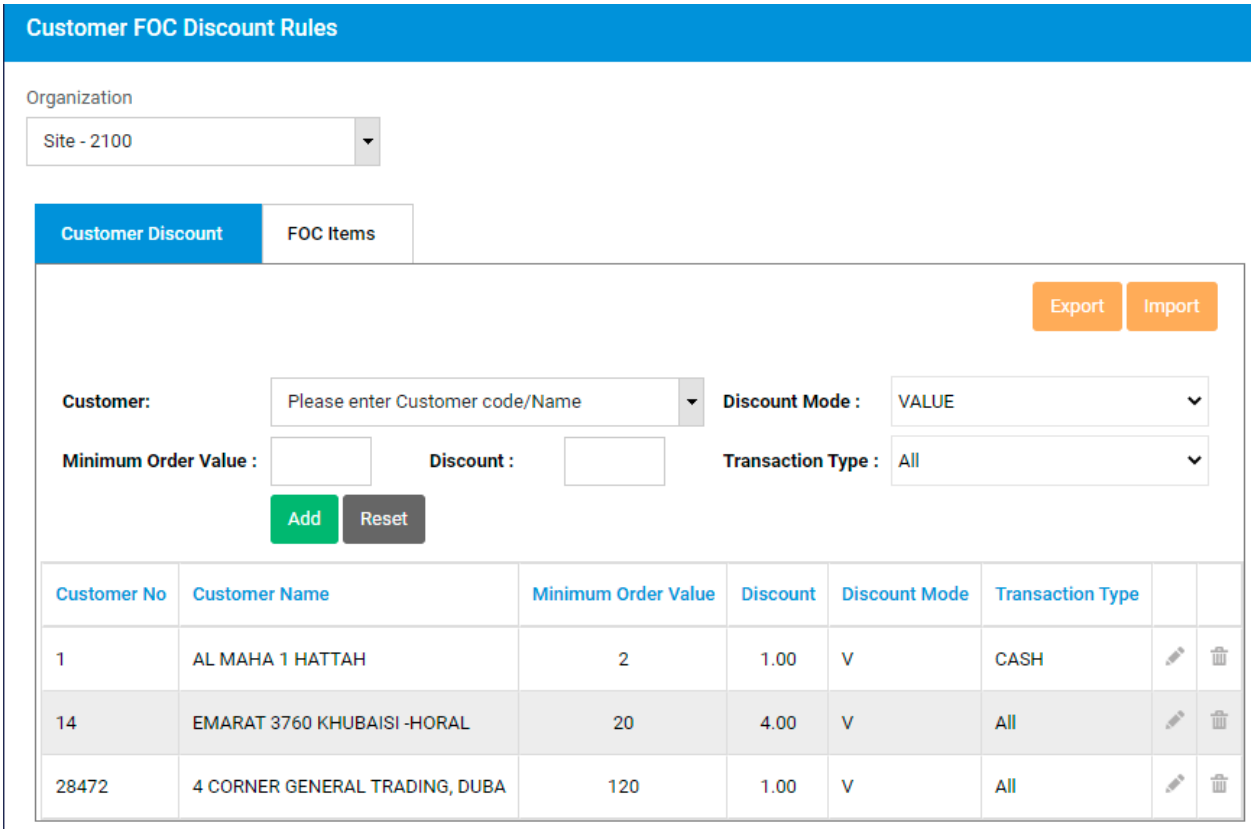
To unassign all the customers, click on button.

8.7.5 Customer FOC Discount Rules

Using Customer FOC Discount Rules, when a customer is eligible for a discount, the salesman can decide whether to give the amount as discount, or to give items worth the discounted amount as FOC.



Select an organization from the drop down. All the defined discount rules will be populated in the table below.

To add a new discount rule, select a customer and discount mode- VALUE or PERCENTAGE. Enter the minimum order value and Discount, and select a transaction type if applicable.

Click on Add button. You will get a confirmation message and the newly added discount rule will be added to the table below.

You can also import the discount rules using an excel file by clicking on Import button.

To define the FOC Items, click on 'FOC Items' tab.

The existing FOC items list will be populated.

To add a new item as FOC item, select the item from the dropdown and click on Add button.

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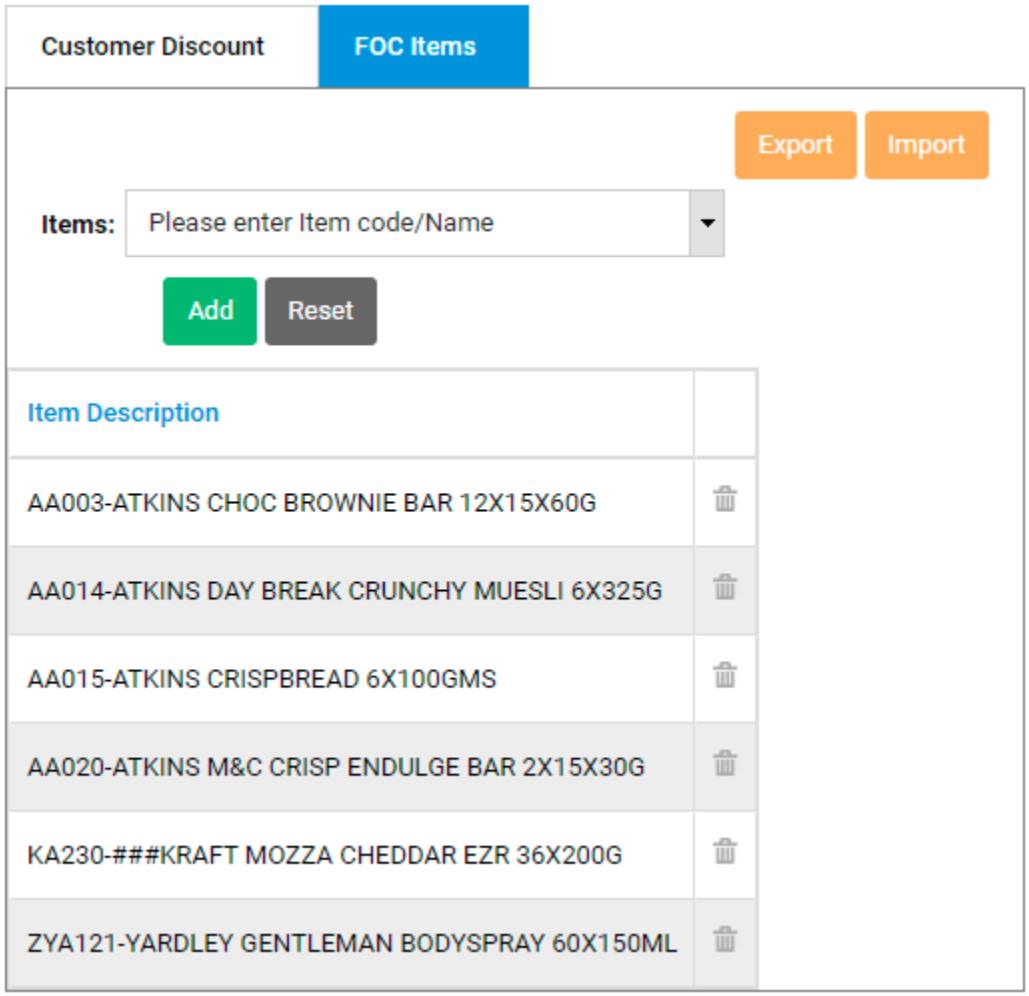
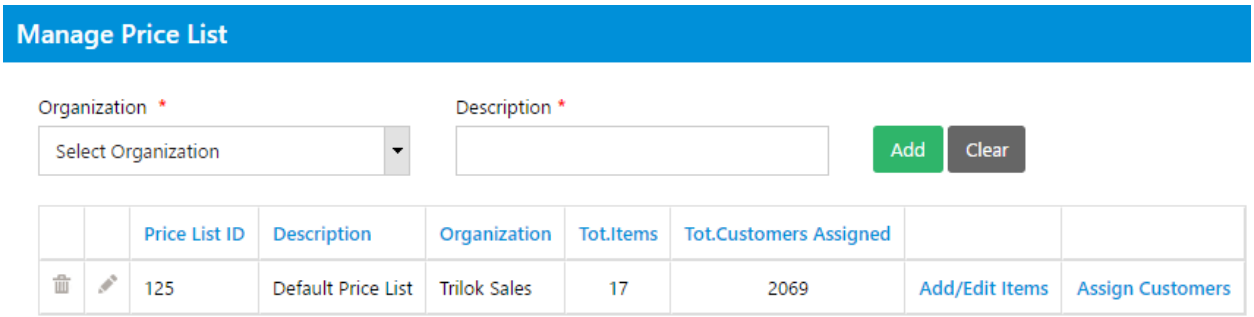


You will receive a confirmation, and the item will be added to the list of FOC items.

8.7.6 Manage Price List

You can create a price list and assign it to the customers in this section.



To create a new price list, select the organization.

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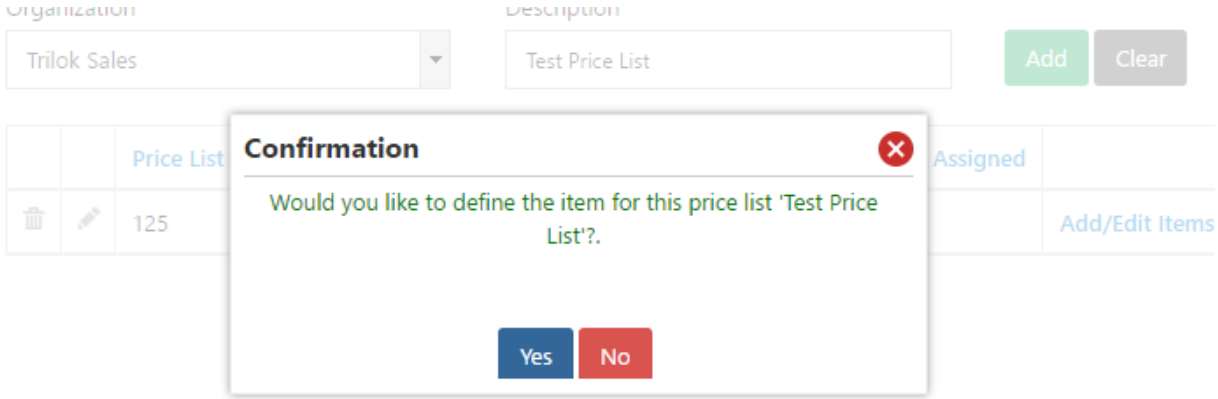
Enter a description. And then click on Add button.



Click on Yes to define items for this new price list.

Select the product from the dropdown, select a UOM, and enter price.

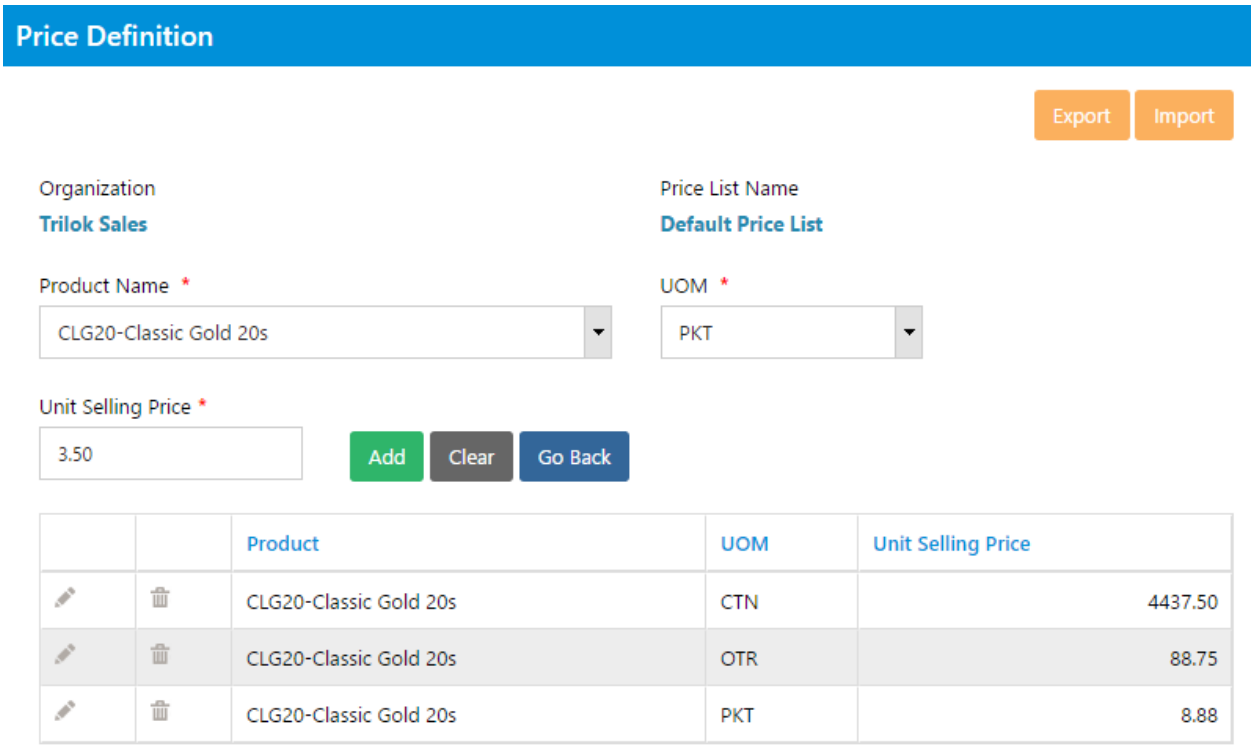
Click on Add to add the item to the price list.

You can import the price list definition using an XLS file created in the specified format.

To import, click on Import button. Choose a file and click on Upload.

You can export the price list definition to an XLS file.

To export, click on Export button and your XLS file will be downloaded.



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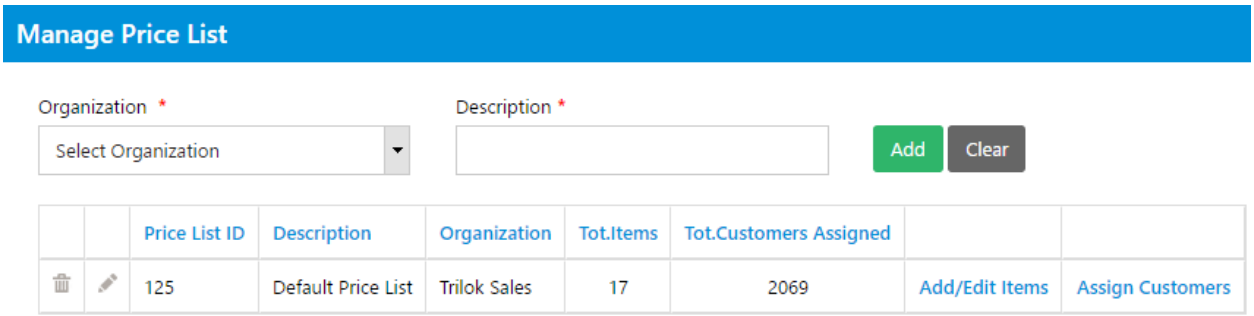
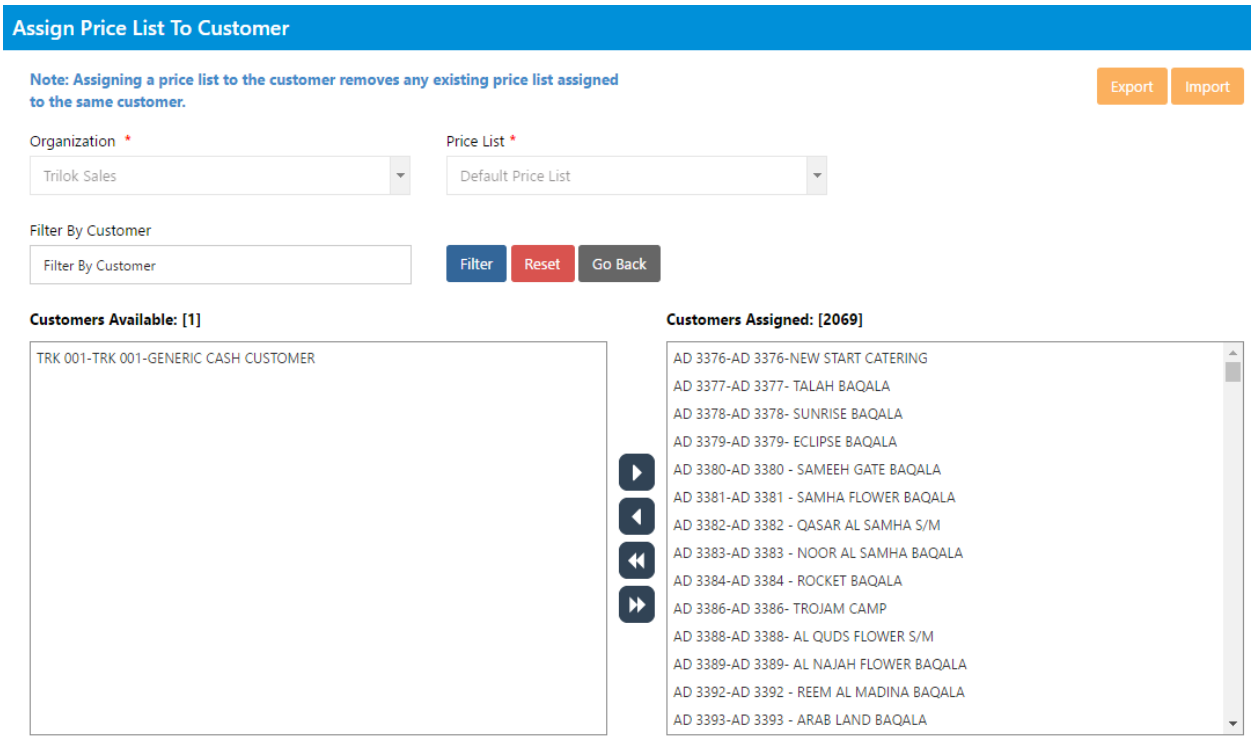
The price list defined will be saved.

To assign customers to the price list, click on Assign Customers button against the price list that is created.



Customer Assignment screen will be displayed.



The customers assigned to the price list will be displayed in the box to the right, whereas unassigned customers will be in the box to the left.

To assign a customer, select a customer in unassigned list and click on button.

To assign all the customers, click on button.

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To unassign a customer, select the customer in the assigned list and click on button.

To unassign all the customers, click on button.

You can import the price list assignment using an XLS file created in the specified format.

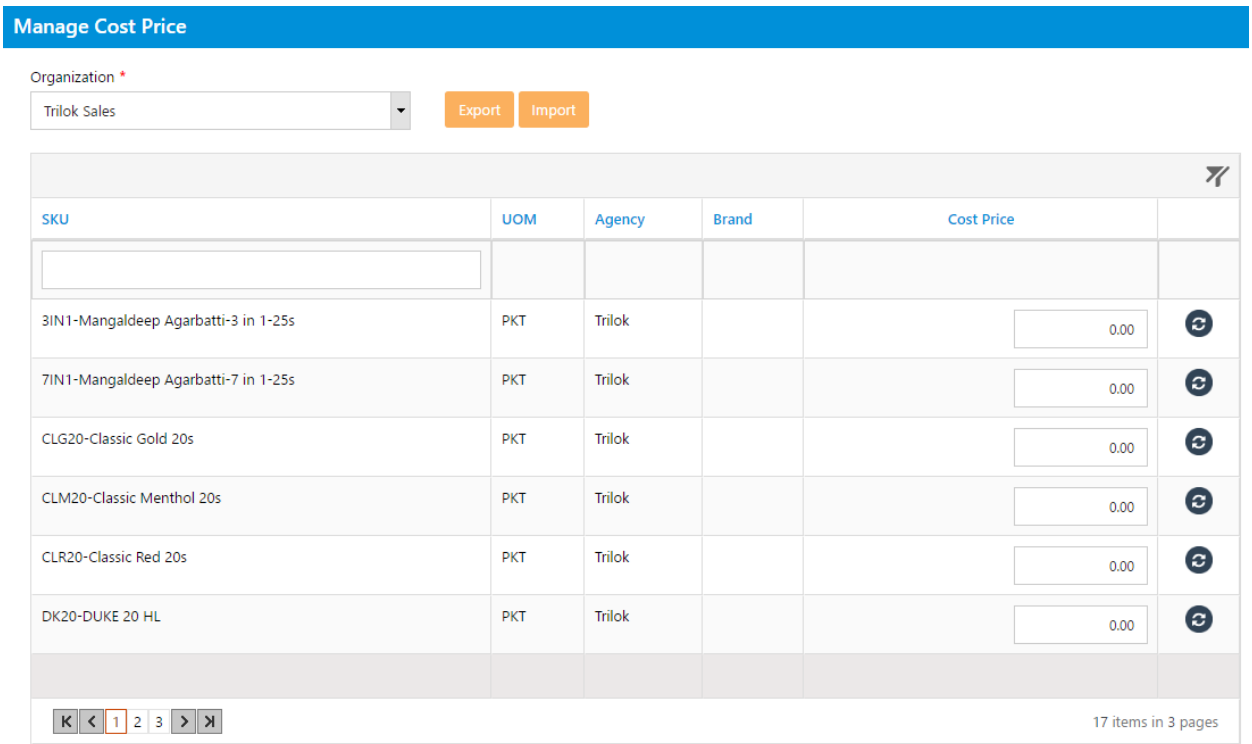
To import, click on Import button. Choose a file and click on Upload.

You can export the price list assignment to an XLS file.

To export, click on Export button and your XLS file will be downloaded.

8.7.7 Manage Cost Price

You can set the cost price for products in this screen. To set, open Manage Cost Price page.



Select the organization. Enter the cost price against the products in the table.

Click on button to update the cost price.

To import cost price definition using XLS file, click on Import button, choose a file and click on Upload.

To export the cost price definition, click on Export button, and your XLS file will be downloaded.

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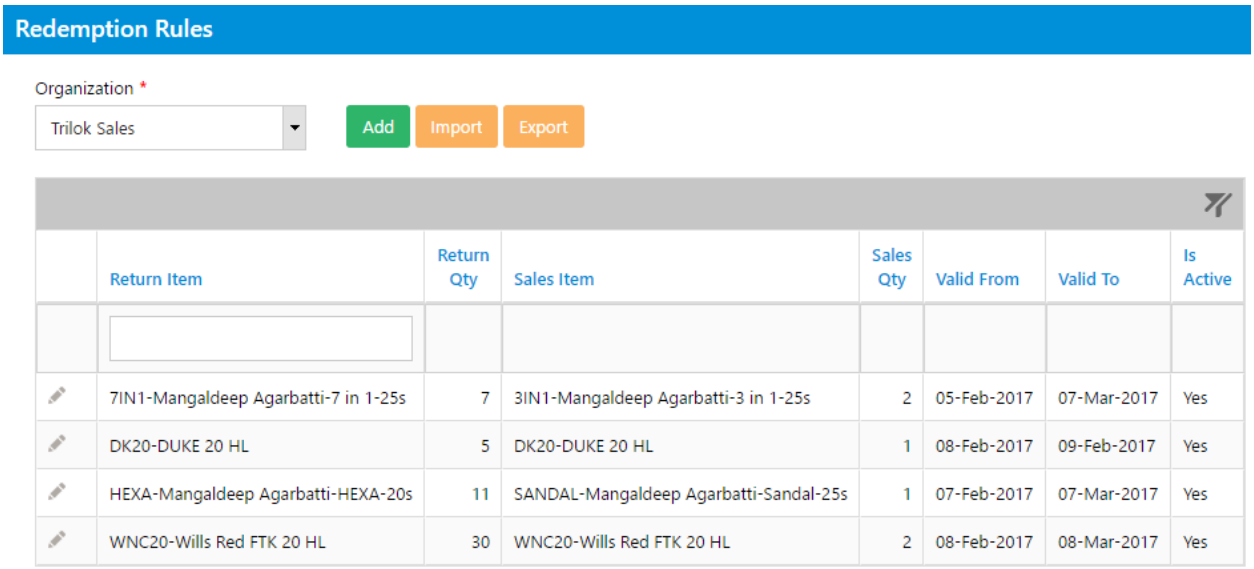
8.7.8 Redemption Rules

Redemption rules are used to define collection of empty packets and issue FOC items against the collected packets.

To see the set redemption rules, select the organization from the dropdown.

The rules will be displayed.



	Return Item	Return Qty	Sales Item	Sales Qty	Valid From	Valid To	Is Active
	7IN1-Mangaldeep Agarbatti-7 in 1-25s	7	3IN1-Mangaldeep Agarbatti-3 in 1-25s	2	05-Feb-2017	07-Mar-2017	Yes
	DK20-DUKE 20 HL	5	DK20-DUKE 20 HL	1	08-Feb-2017	09-Feb-2017	Yes
	HEXA-Mangaldeep Agarbatti-HEXA-20s	11	SANDAL-Mangaldeep Agarbatti-Sandal-25s	1	07-Feb-2017	07-Mar-2017	Yes
	WNC20-Wills Red FTK 20 HL	30	WNC20-Wills Red FTK 20 HL	2	08-Feb-2017	08-Mar-2017	Yes

To edit a redemption rule, click on Edit button.

To add a new redemption rule, click on Add button.

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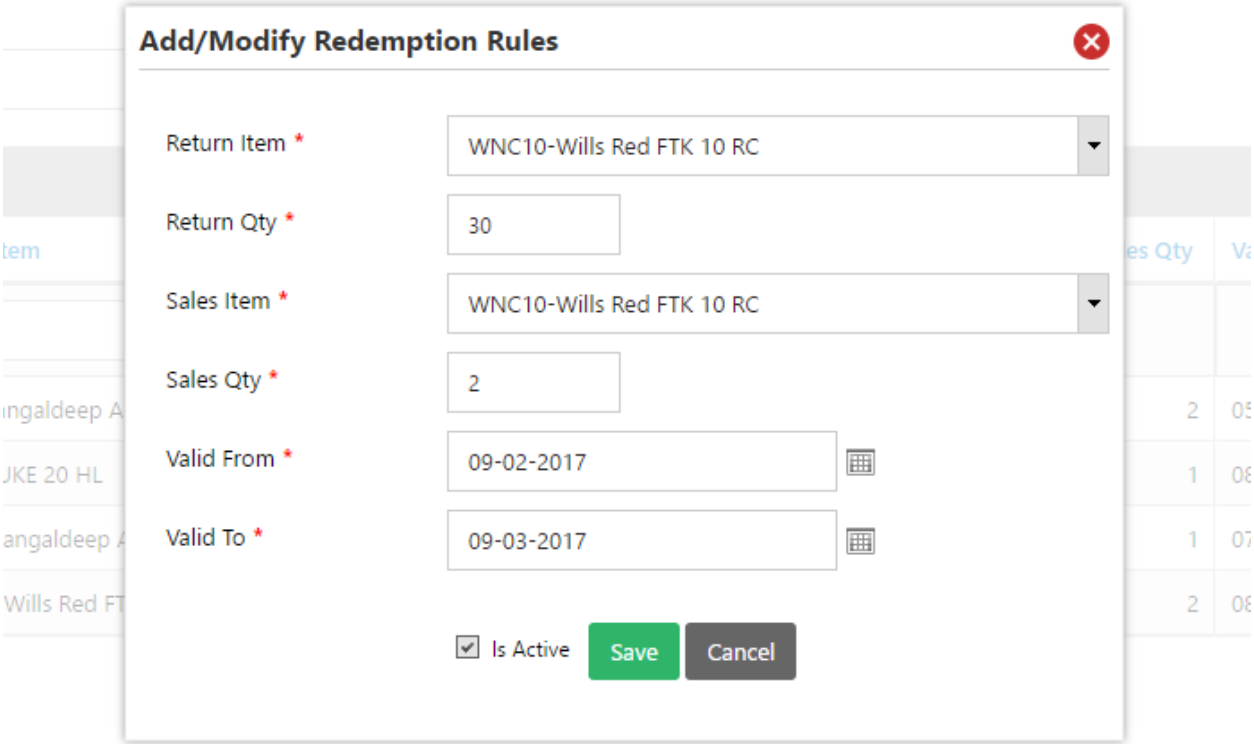

Select a return item, and its quantity. Select an FOC item and its quantity.

Choose the From and To dates.

Click on Save to save the redemption rule.

8.7.9 Multi Transaction Bonus Rules

When a customer achieves set number accumulated sales of a product, they will be provided with FOC items. These definitions can be set in this module.

To view the defined Multi transaction bonus rules, select the organization.

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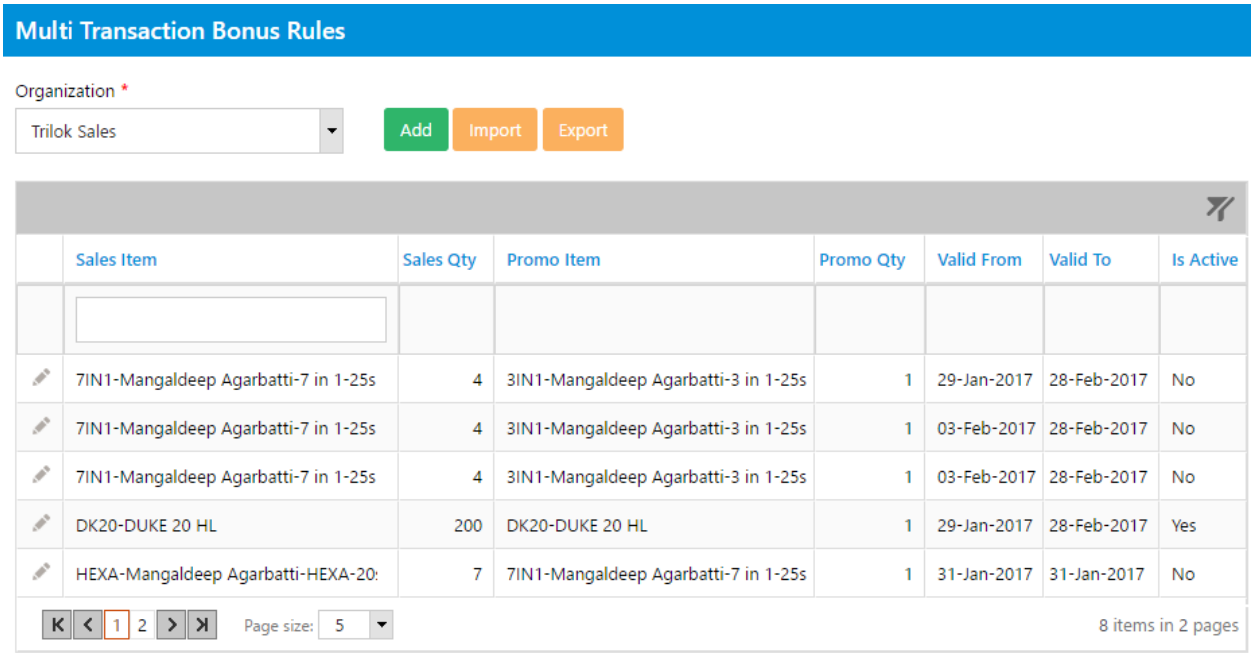
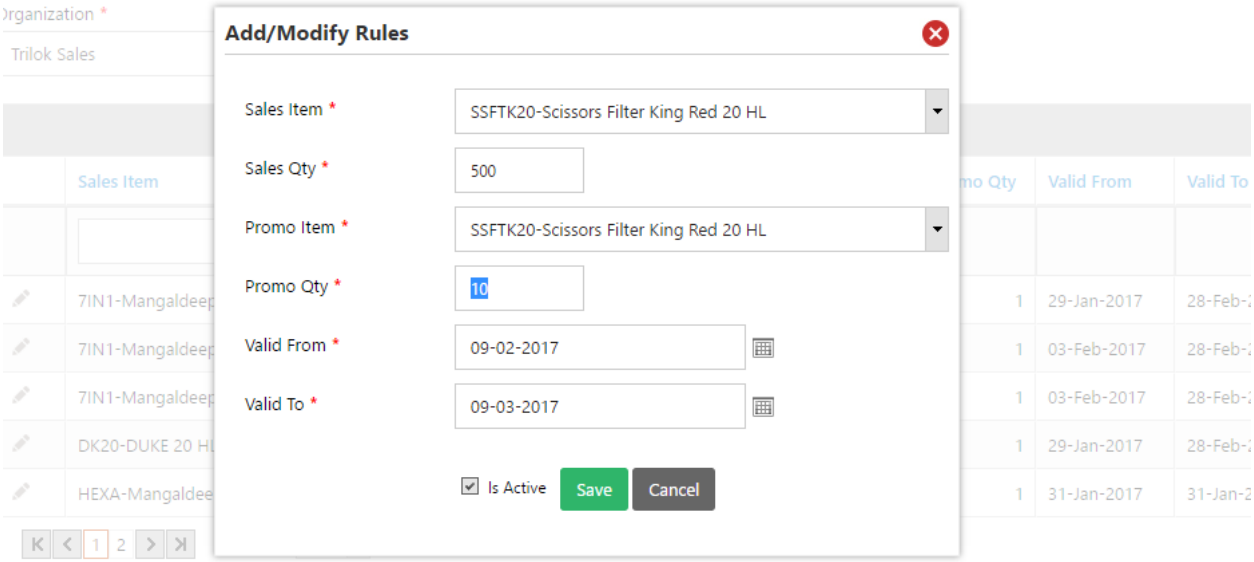


To edit a definition, click on Edit button in the row corresponding to the sales item.

To add a new definition. Click on Add button.



Select a sales item and enter the sales quantity.

Select a promo item and enter the quantity.

Select valid from and valid to dates.

Click on Save button to save the changes.

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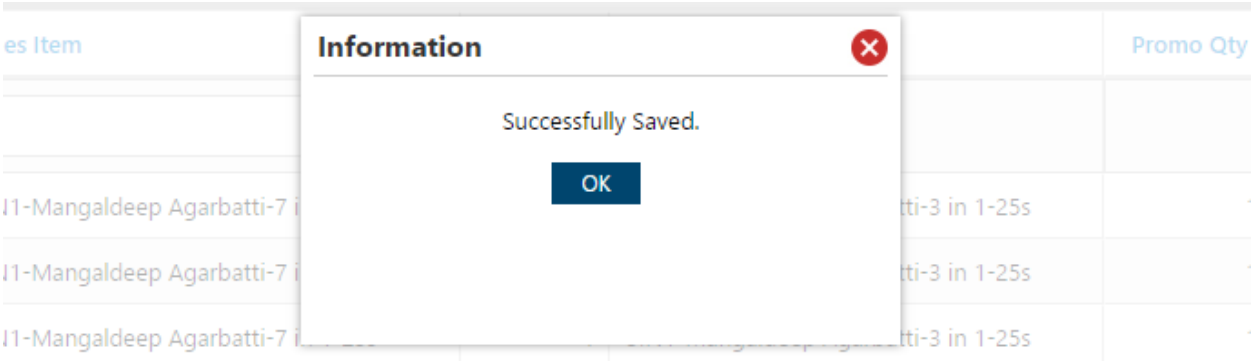
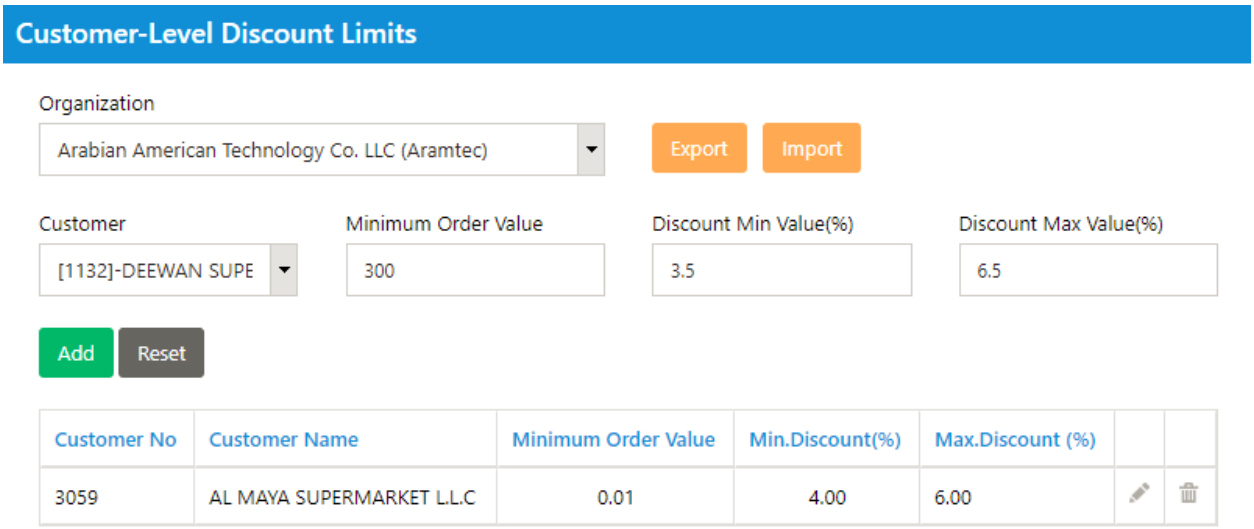


You will receive an acknowledgment "Successfully saved".

8.8 Customer Level Discount Limits

In this screen you can define what is the minimum and maximum discount that can be given to a customer. You can also define the minimum order value on which discount can be applied.



All the defined discount limits will be displayed in this screen. To define a new discount rule, select a customer from the drop down. Enter the minimum order amount, Minimum discount percentage, and Maximum discount percentage.

Click on **Add**. The new discount rule will be added.

You can also import discount rules using an excel file by clicking in Import button.

8.9 VAT Rules

Using this screen, you will be able to define the VAT rules for customers and products. Select an organization from the dropdown to view all the existing VAT rules.

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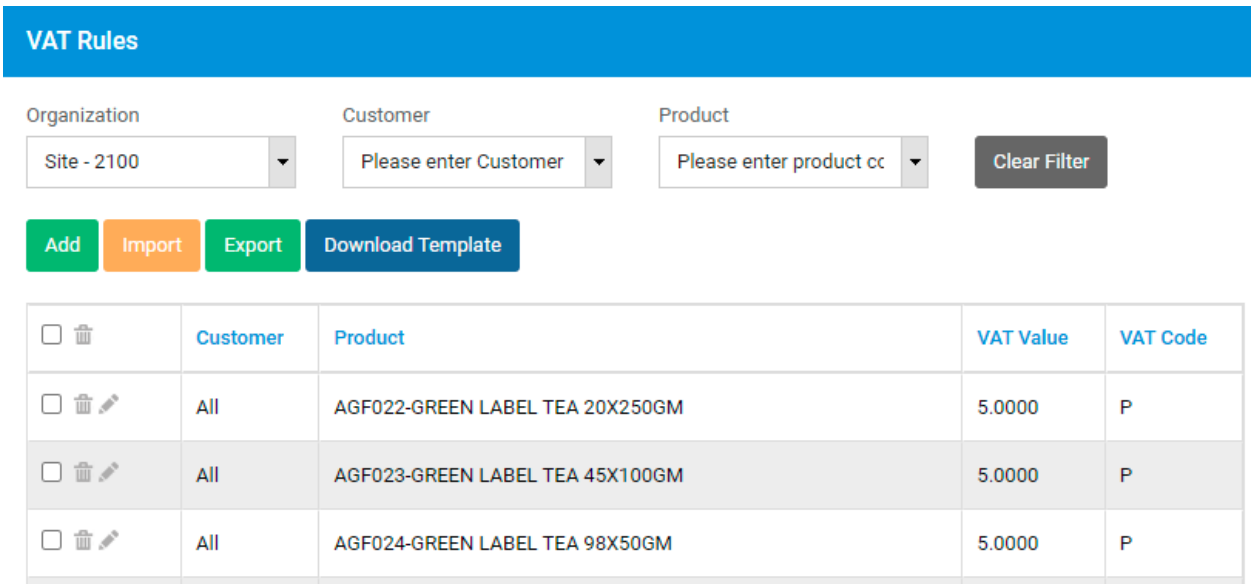
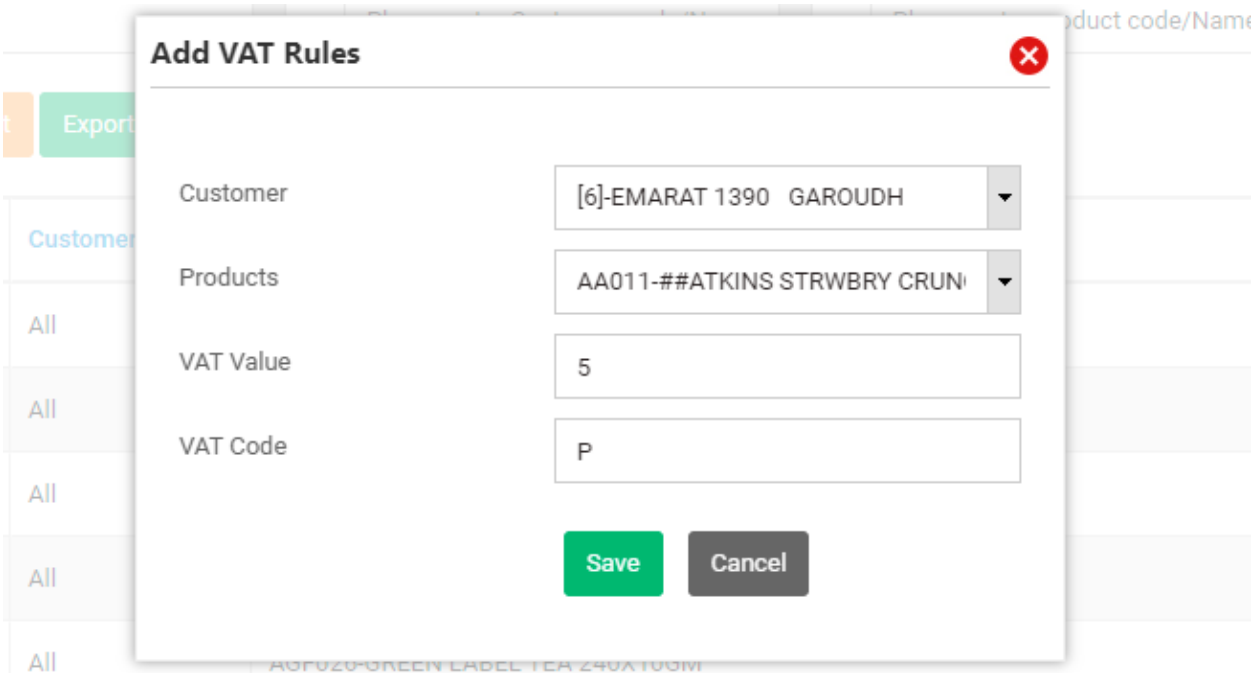


To add a new VAT rule, click on Add button. A pop up will be displayed.



Select the Customer and the Product. Enter VAT value and VAT code. VAT code will be P for percentage, and V for value.

Click on Save button to save the VAT rule.

You can also import VAT rules using an excel file by clicking on Import button.

8.10 Manage Product Images

You can add an image to the products using this screen.

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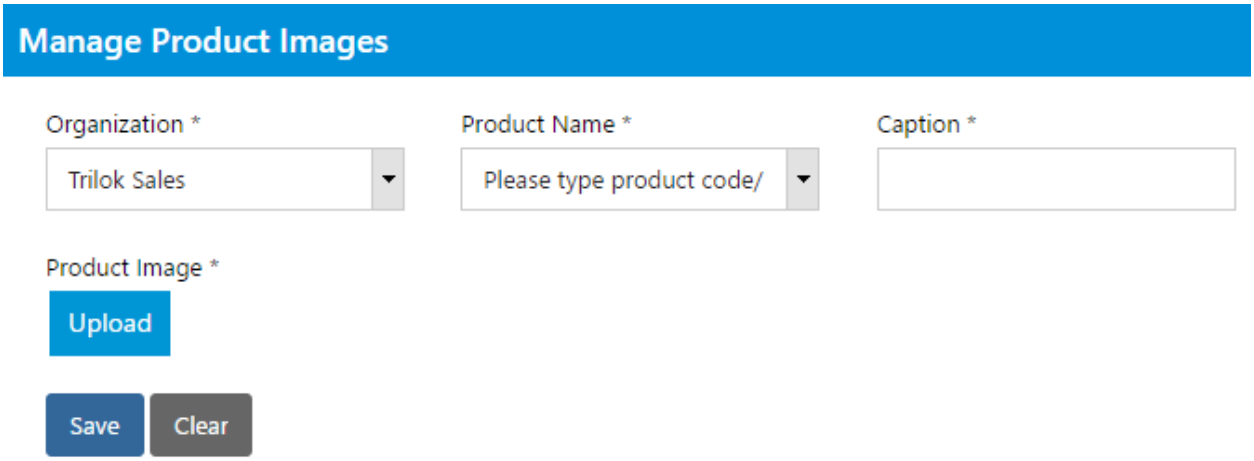
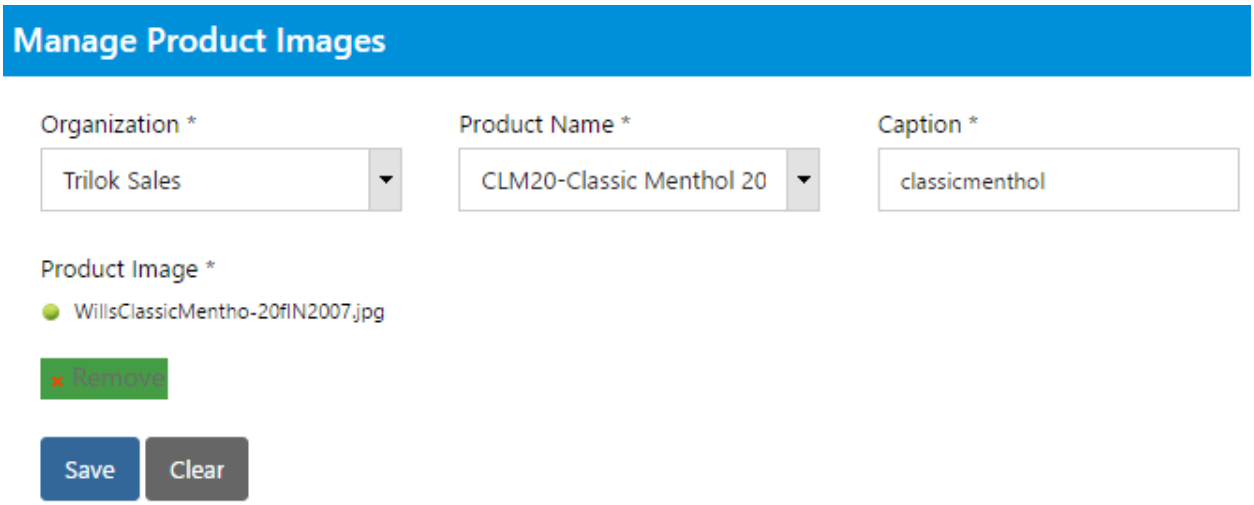


To add a product image, select organization, choose the product, provide a caption.

Click on Upload and select an image.



Click on Save button to save the image.

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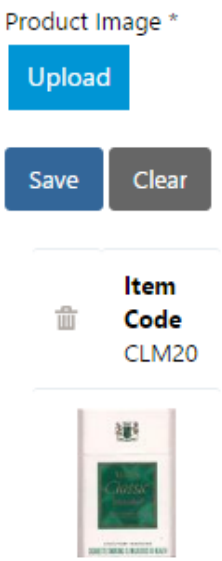
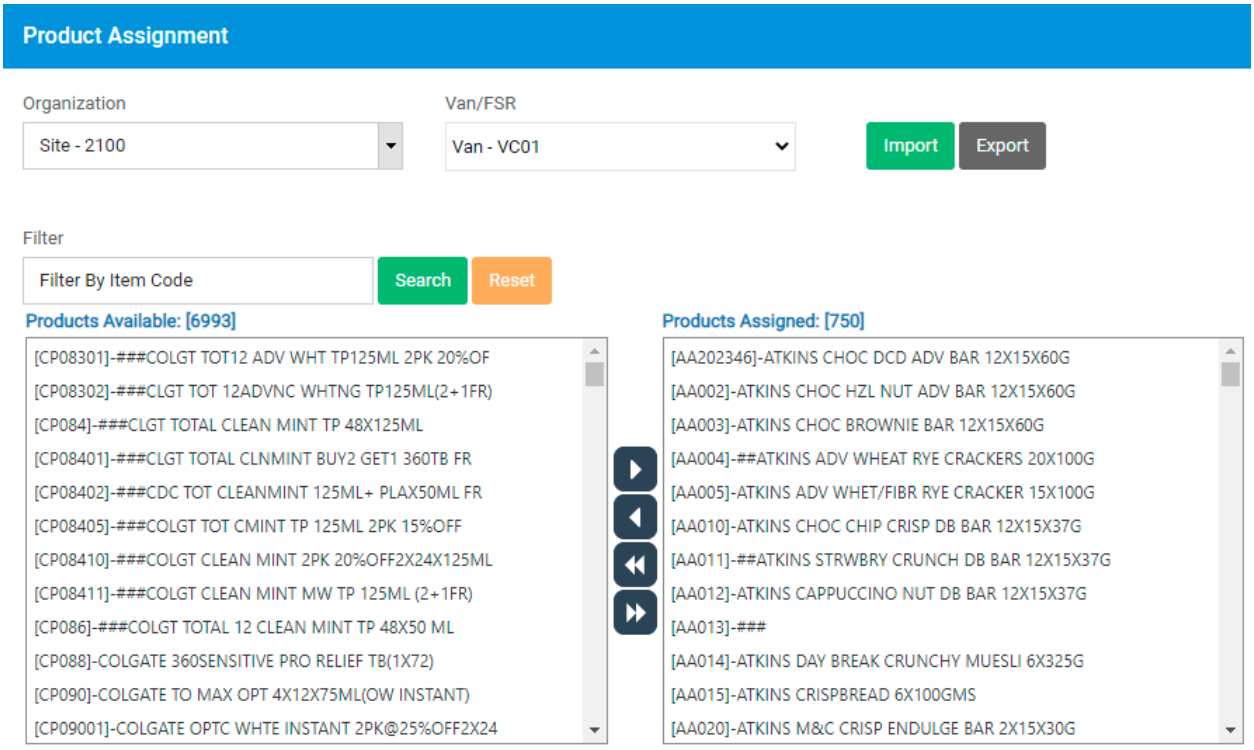


The product image will be saved.

8.11 Product Assignment

Product assignment screen can be used to assign one or more products to an FSR. Upon page load, select an organization and a Van/FSR.

The available and assigned list of products will be refreshed.



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The assigned list of products will be displayed on the right-hand side of the screen, whereas not assigned list of products will be displayed on the left-hand side.

To assign a product, select a product in unassigned list and click on button.

To assign all the products, click on button.

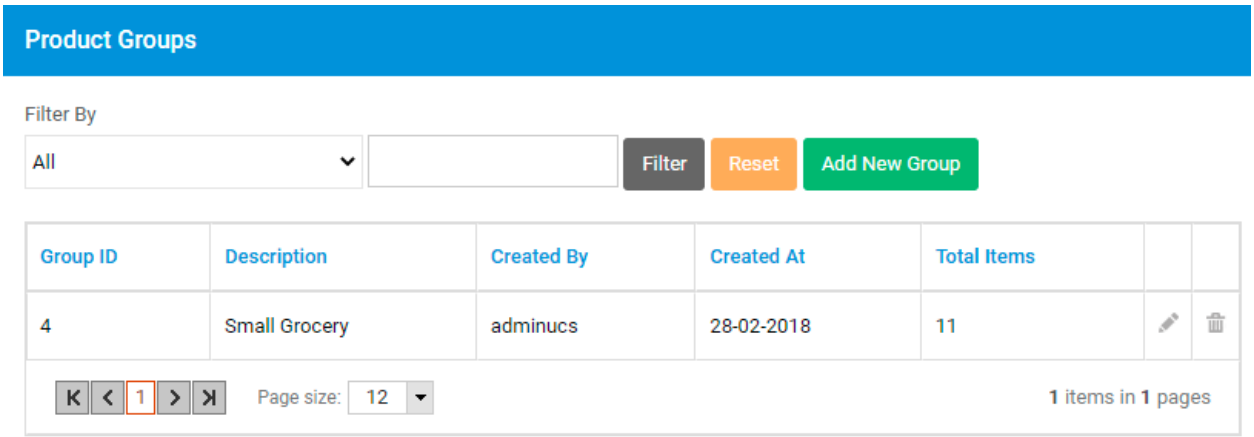
To unassign a product, select the product in the assigned list and click on button.

To unassign all the products, click on button.

You can also import the product assignment using an excel file by clicking on Import button.

8.12 Manage Product Group

Using Manage Product Group screen, you will be able to create a group which contains one or more products. This group can then be used in other areas such as assigning products to FSR.



To create a new product group, click on Add New Group.

Group definition screen will be displayed. Select an organization. All the products of the selected organization will be populated.

Enter a Group Name. To assign a product to the group, select a product in available products list and click on button.

To assign all the products, click on button.

To unassign a product, select the product in the assigned list and click on button.

To unassign all the products, click on button.

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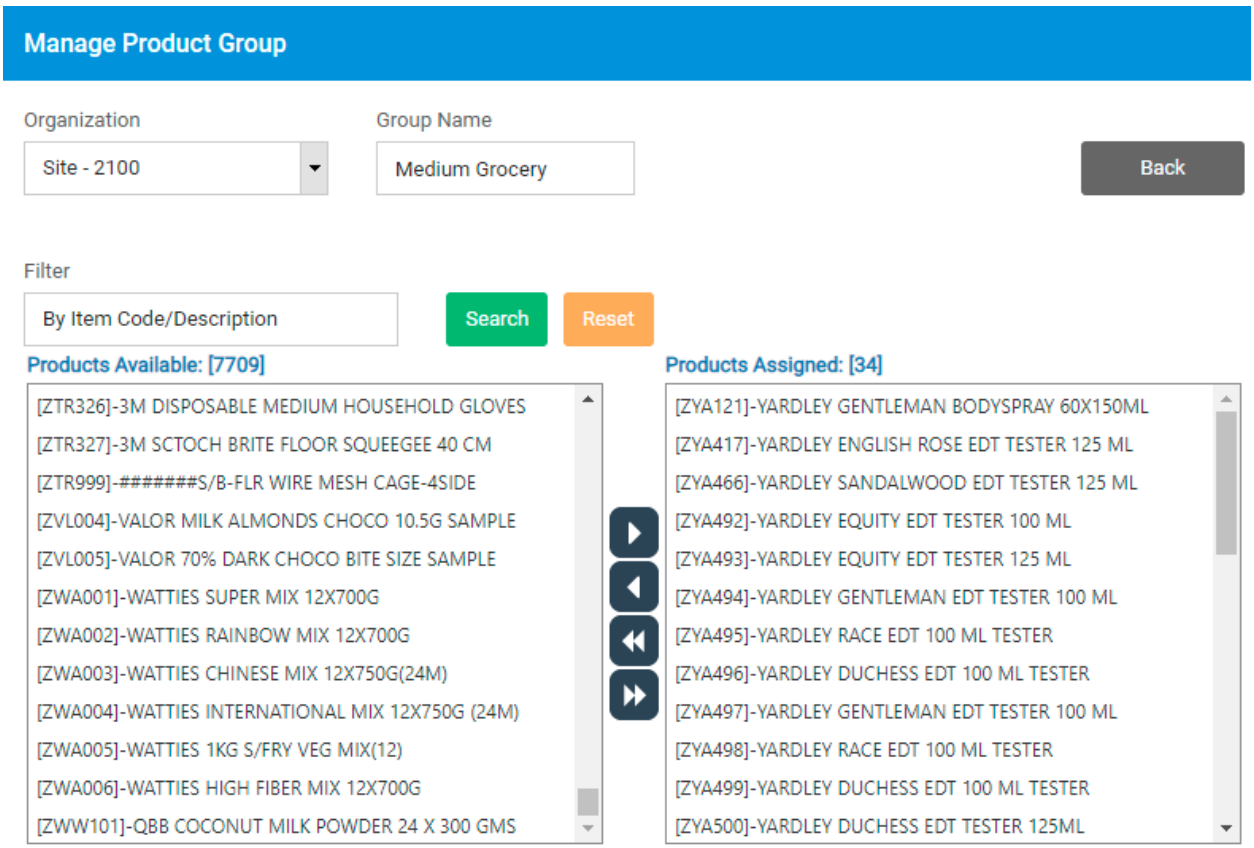
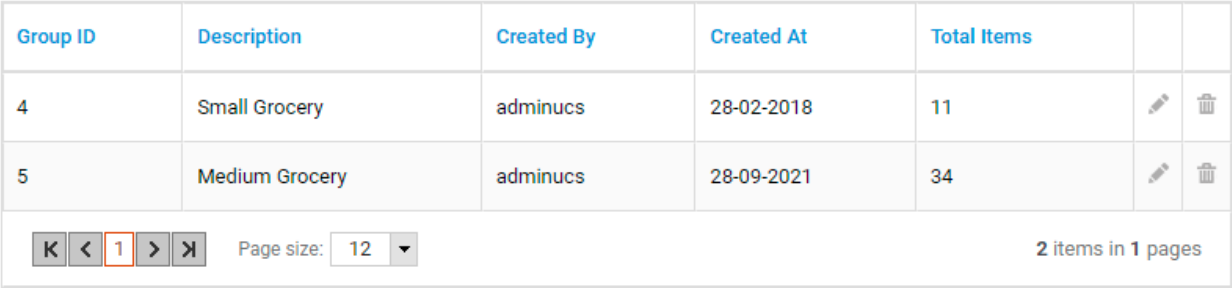


Click on Back button to go back.



Group ID	Description	Created By	Created At	Total Items		
4	Small Grocery	adminucs	28-02-2018	11		
5	Medium Grocery	adminucs	28-09-2021	34		

Click on edit button to modify the product group, or delete button to delete a product group.

8.13 Assign Product Group

Using Assign Product Group screen, you will be able to assign the created product groups to FSRs.

Select the organization and the van/FSR. The current assignment will be displayed.

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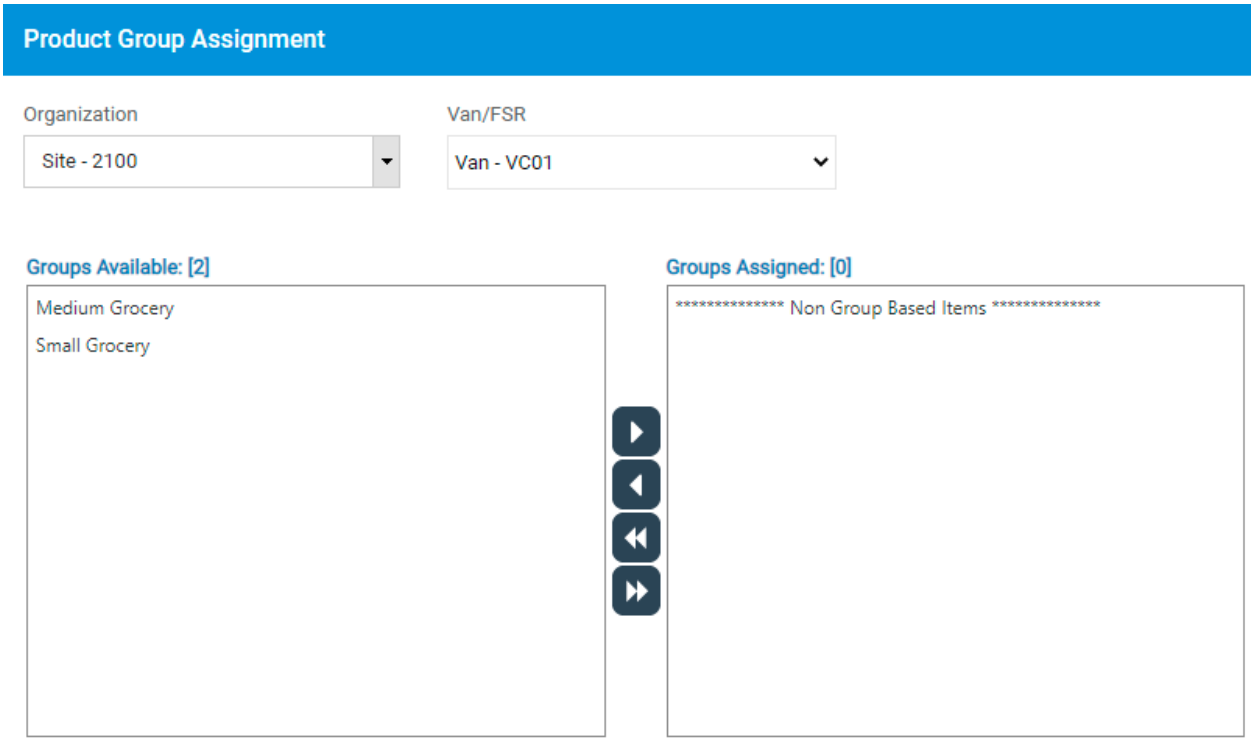


To assign a product group, select a product group in available groups list and click on button.

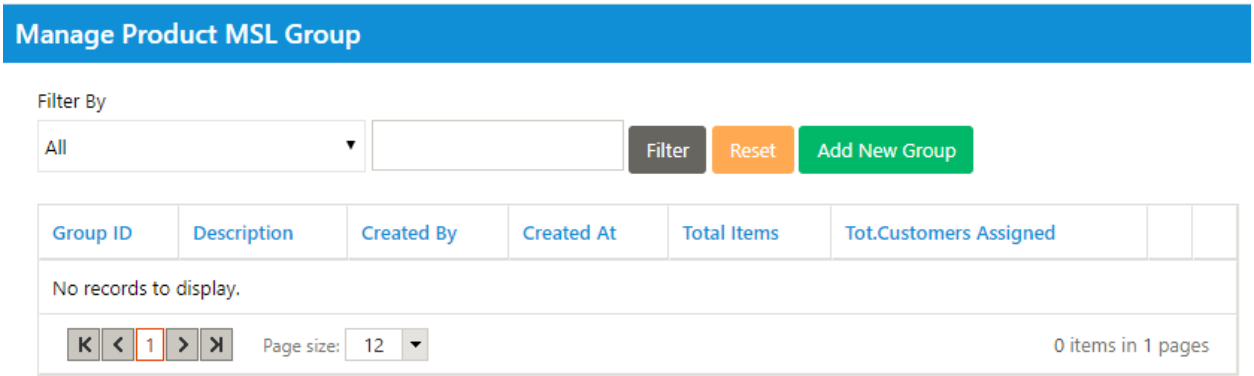
To assign all the groups, click on button.

To unassign a group, select the product group in the assigned list and click on button.

To unassign all the groups, click on button.

8.14 Manage Product MSL Group

You can create multiple MSL Groups using this screen. All the created MSL Groups will be displayed when you open this screen.



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To create a new MSL group, click on **Add New Group** button.

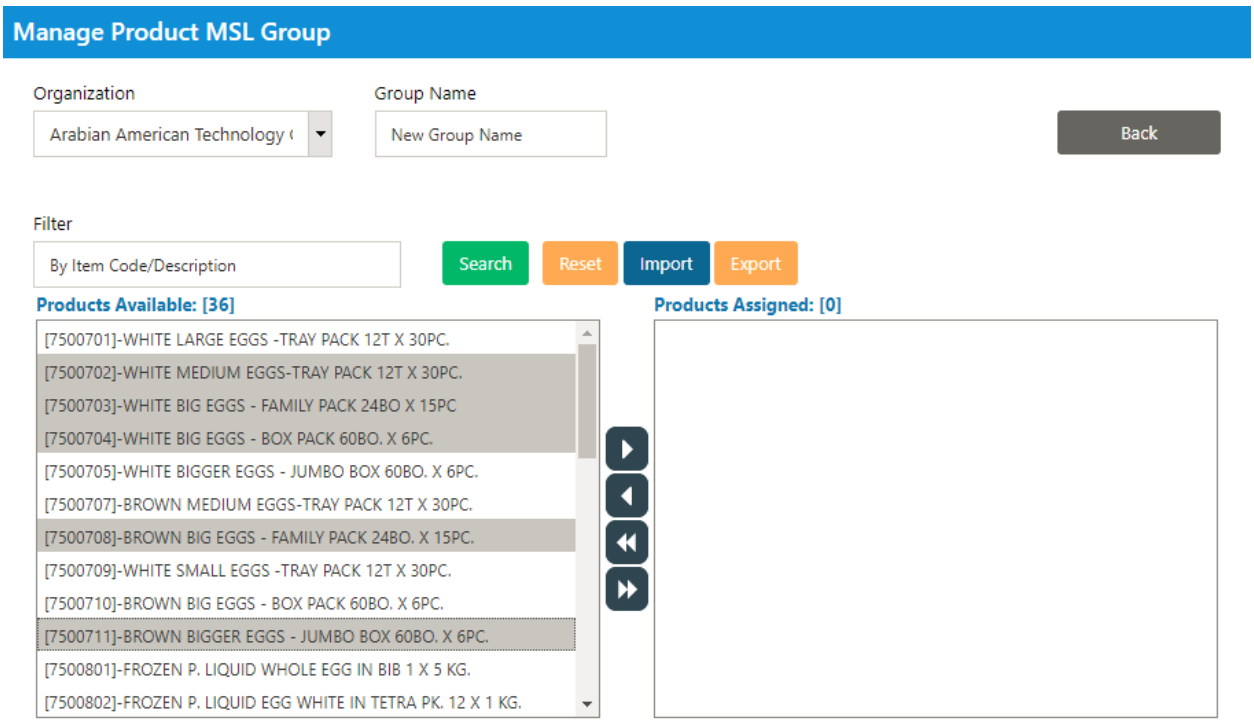
Enter a name for the MSL Group. The products will be listed in multi selection boxes below.

In order to assign products to the MSL Group, select the products in Product Available section, click on button.

To assign all the products to MSL group, click on button.

In order to remove a product from MSL group, select the product from Assigned list, click on button.

To remove all the products, click on button.



You can also import the list of products to the MSL group using an excel file. To import using an excel file, click on Import button.

Click on back button to go back.

Group ID	Description	Organization	Created At	Total Items	Tot.Customers Assigned		
4	Small Grocery	Site - 2100	30-12-2019	6	7265		
5	Large Grocery	Site - 2100	29-12-2019	2	0		

You can use edit or delete buttons to edit or delete existing MSL groups.

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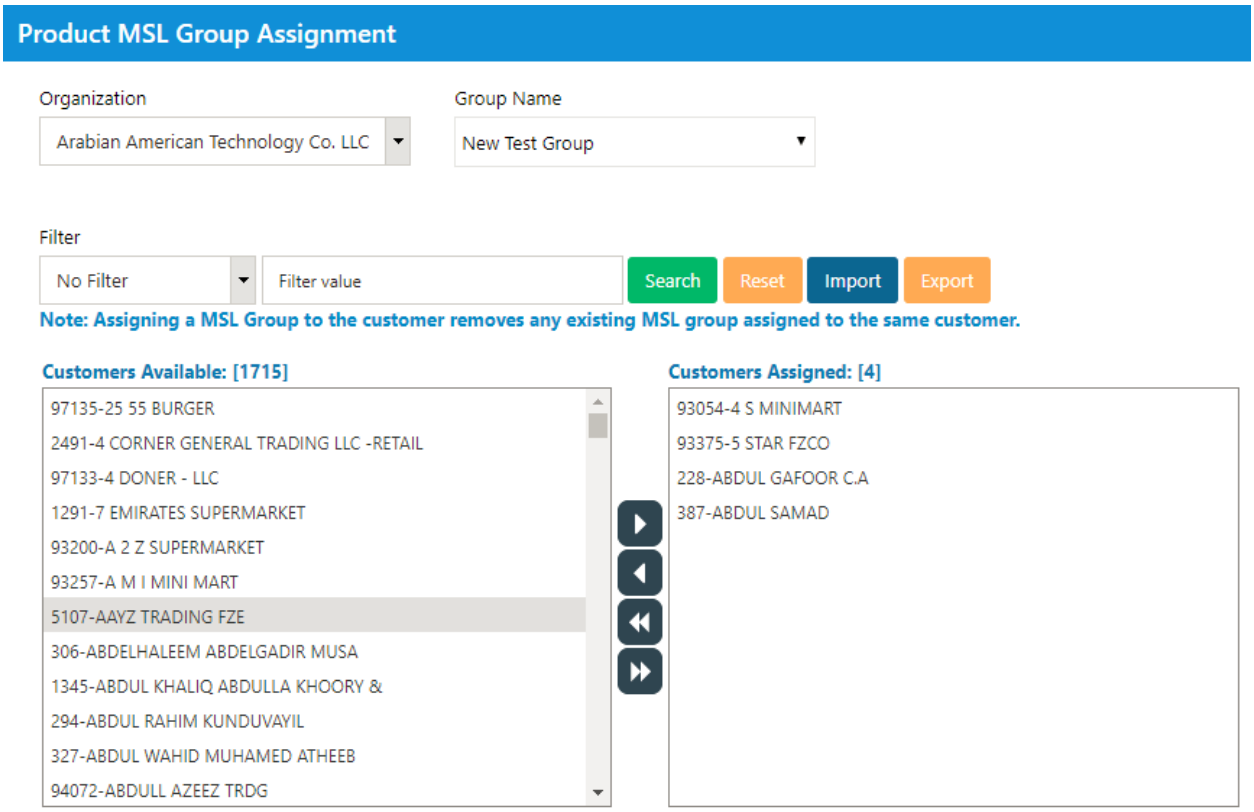
8.15 Product MSL Group Assignment

You can assign the MSL Groups to customers in this screen. Select Organization, and the Group name using the drop down.

Customer Available and Customers assigned will be listed.



In order to assign customers to the MSL Group, select the products in Product Available section, click on button.

To assign all the customers to MSL group, click on button.

In order to remove a customer from MSL group, select the customer from Assigned list, click on button.

To remove all the customers, click on button.

You can also import the customer assignment to MSL Product group by using an excel file by clicking on Import button.

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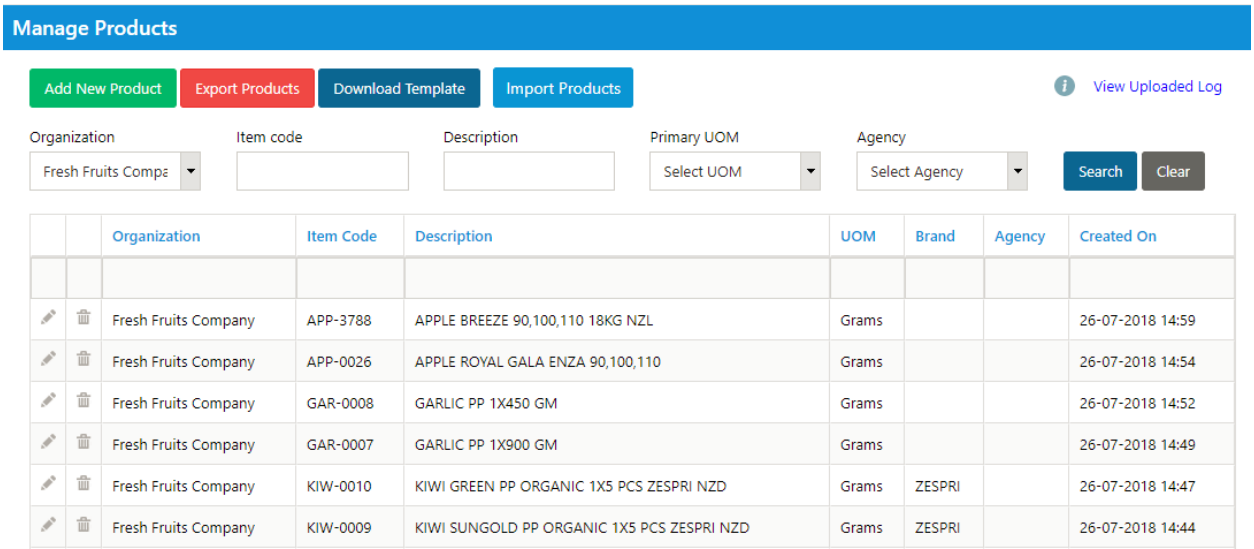
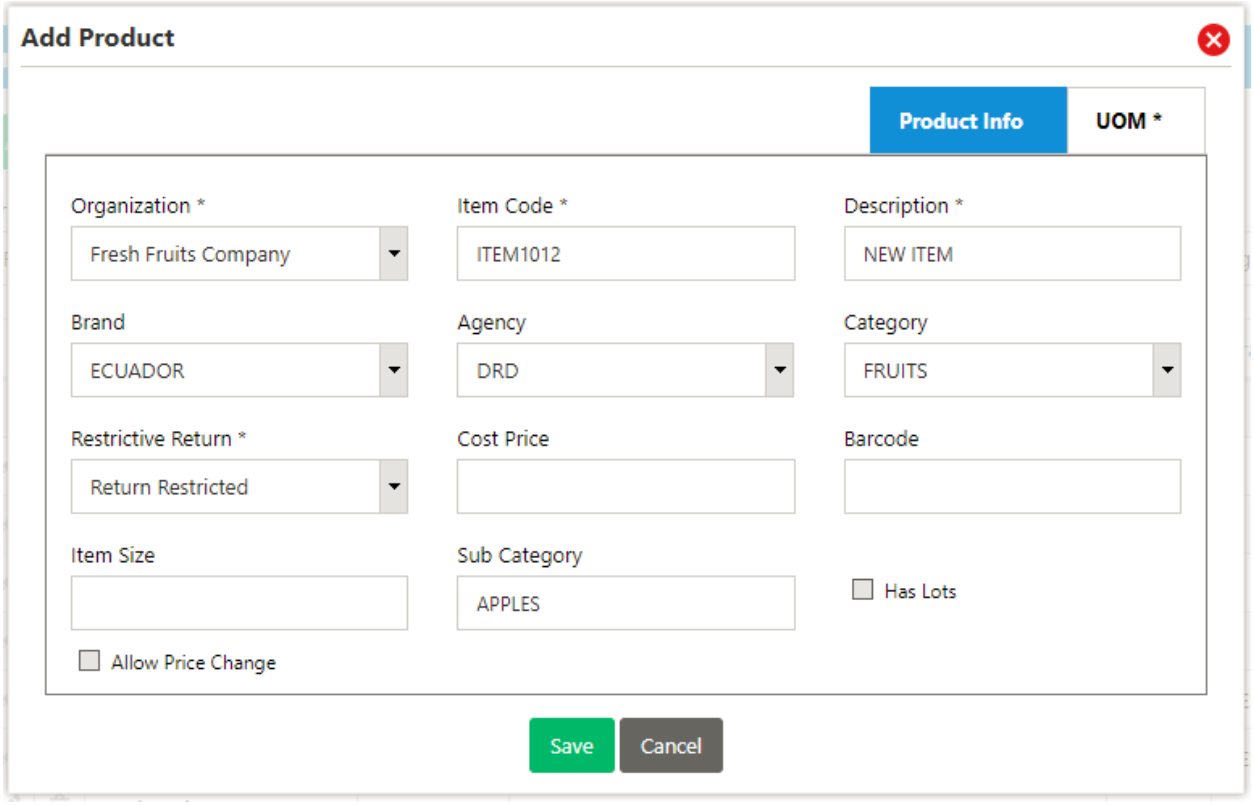
8.16 Manage Products

In Manage Products screen, you can create a new product, modify an existing product information, enable/disable a product, import products to the system etc.



To add a new product, click on **Add New Product** button.

A pop up will be displayed with two tabs; **Product Info** and **UOM**. In Product Info tab, you need to provide the basic information related to the product.



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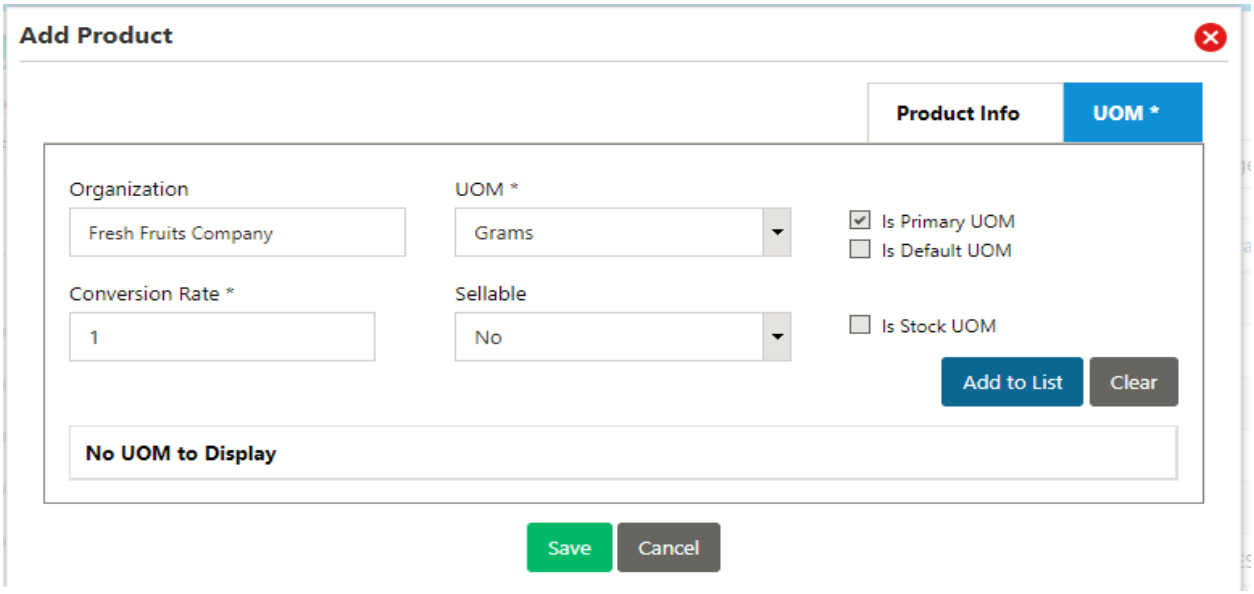
Once the basic information is entered, click on **UOM** tab to define Unit of measurement for this product.



Select a UOM from the drop down, define the conversion rate against the primary UOM. Once entered, click on Add to List and this UOM conversion will be added. Continue the process if you have multiple UOMs. Please note that a Primary UOM is mandatory for a product to be saved.

To save the product, Click on **Save** button.

To edit an existing product, click on button against the product which you wish to edit.

Click on button against the products in order to disable that product.

You can import products list using and XLS file. To import, click on **Import Products** button. You can download the import template by clicking on **Download Template** button.

8.17 Maximum FOC Quantity Definition

This screen can be used to define which are the items that can be part of FOC invoices, and the maximum quantity that can be given as FOC. FOC invoices can be created by the users for whom FOC Invoices option are enabled in User Level Settings screen.

To define maximum FOC quantity against items, select an organization and a product. Click on Search button.

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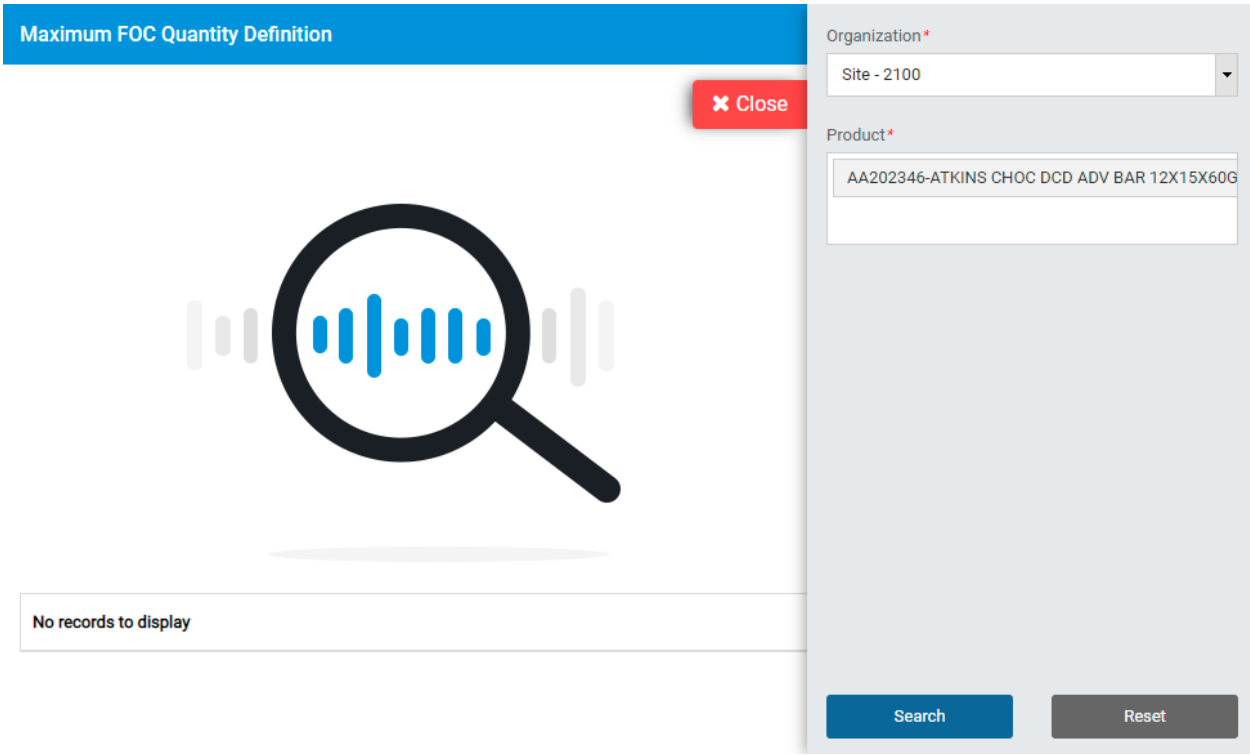
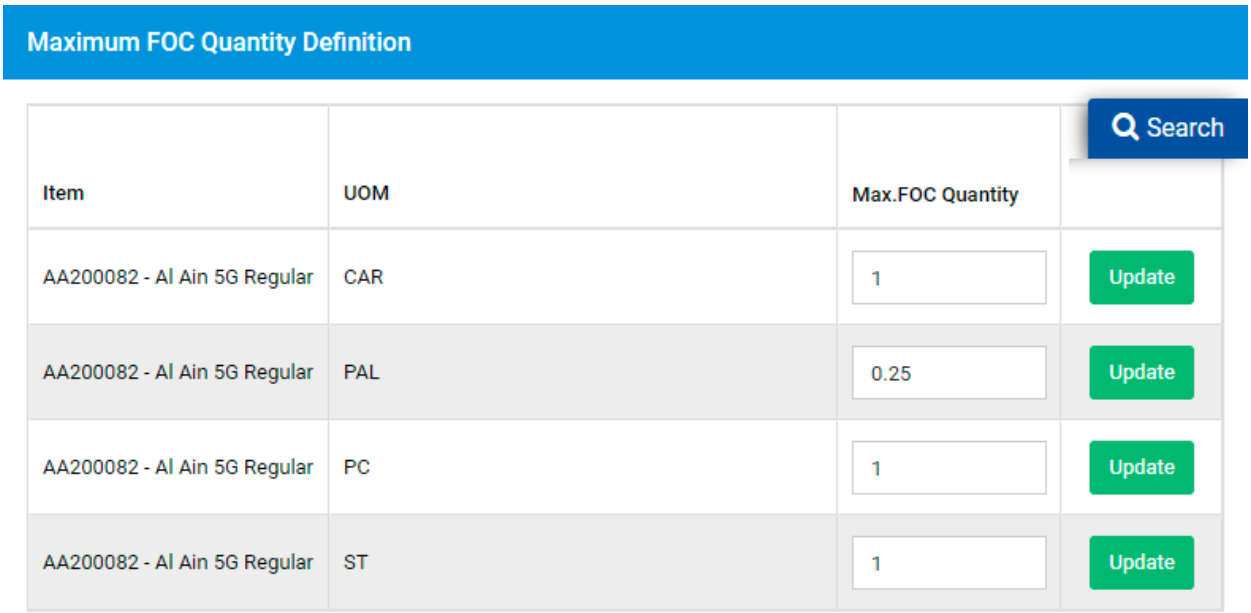


The products and the corresponding UOMs will be populated.



Enter the Maximum FOC quantity against each UOM of the FOC item. Click on Update button against the ones you just updated. The records will be saved.

Repeat the steps for defining Minimum FOC quantity against other items.

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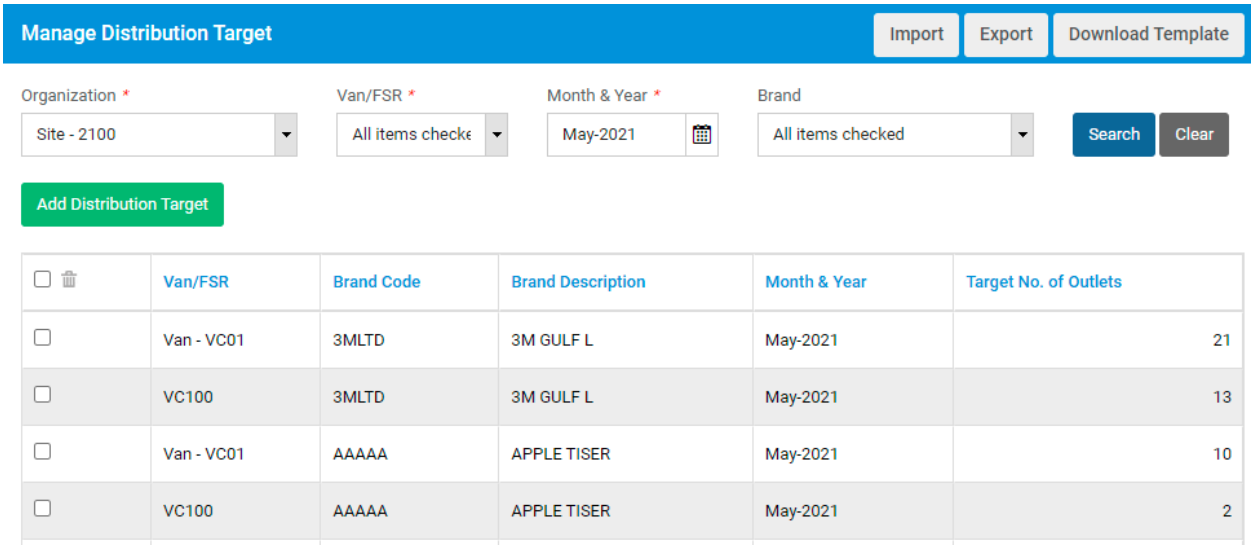
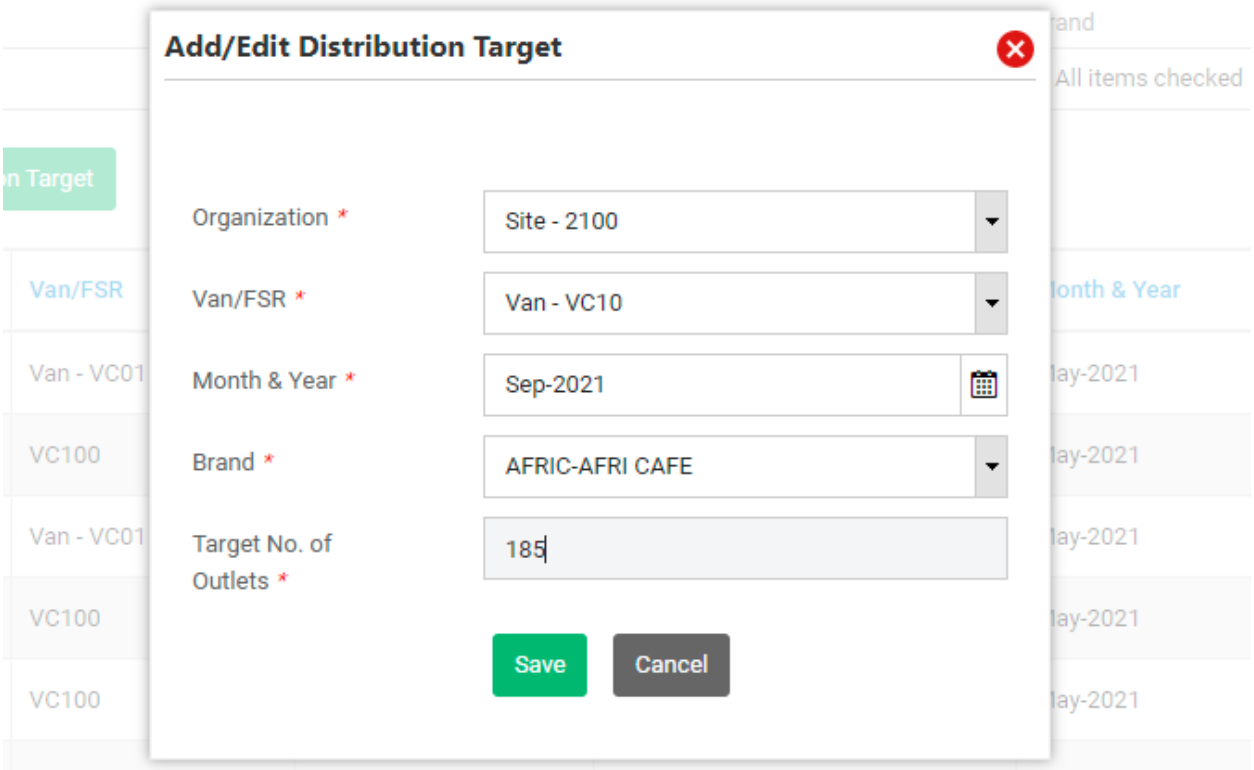
8.18 Distribution Targets

Distribution targets are the target number of customer outlets that are supposed to be billed by a salesman per brand. Target will be defined on a monthly basis.



To add a new distribution target, click on Add Distribution Target button. A pop up will be displayed.



Select the organization, Van/FSR, Month & Year, and Brand.

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Enter the target number of customer outlets that are to be billed against the brand that was selected.

Click on Save button to save target definition.

You can also import distribution targets using an excel file by clicking on Import button.

9. Custom Targets

Custom Targets are set so that these values can be referred to, while preparing some of the reports. For example, call targets are referred to while preparing War Room Score Board report.

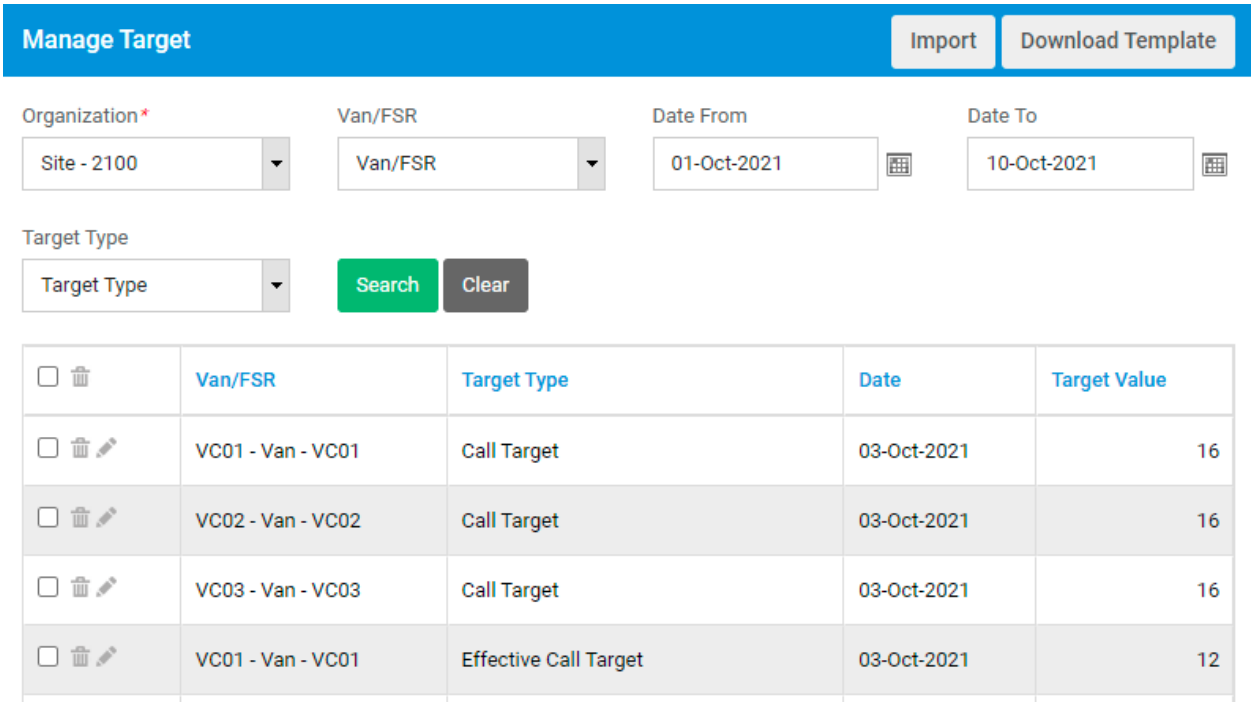
9.1 Manage Targets

In Manage Targets screen, you will be able to define Calls Target, Effective Calls Target, and SKU per Effective Call Target.

Calls Target: Number of customer visits that are to be made on each calendar day. For each day of month, the targets can vary.

Effective Calls Target: Number of productive visits that are to be made on each calendar day.

SKU per Effective Call Target: Number of items to be billed per productive visit on each calendar day.



The target definition can be done using an excel file by clicking on Import button.

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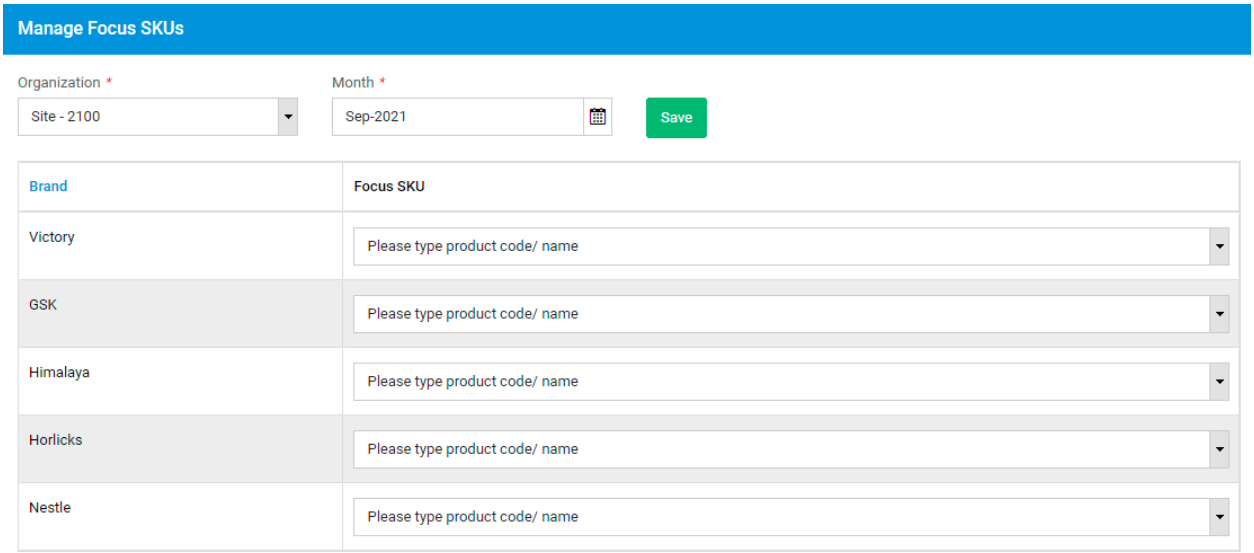
9.2 Manage Focus SKUs

Focus SKUs for a month can be defined using this screen. There can be only one Focus SKU per agency for a month. Focus SKU is being used in War Room Score Board report.



Select an organization and month.

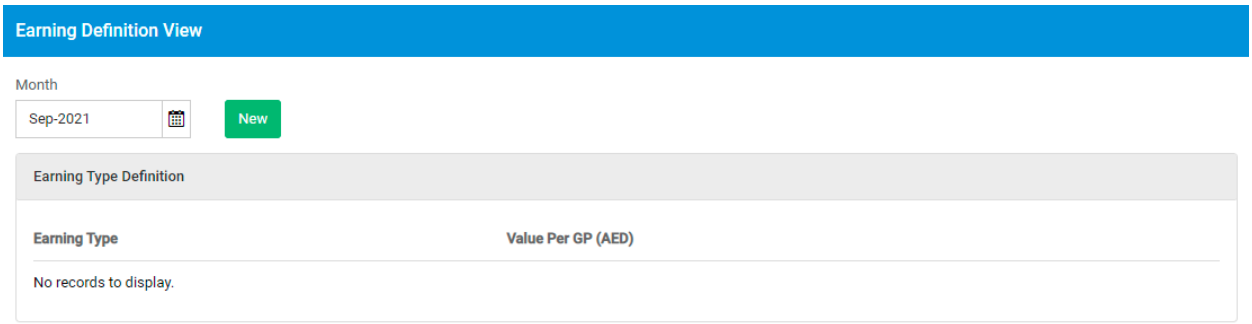
Select the Focus SKU against each agency and click on Save button.

10. Golden Points

Golden points is a program for FSR to encourage and boost their sales performance. There are several parameters that is set to calculate and achieve golden points. Golden points related screens are used to define the necessary data required for it to function, and to confirm and lock the golden points achievement.

10.1 Earning Definition View

In this screen, you will be able to define how much an FSR will be able to earn by achieving golden points.



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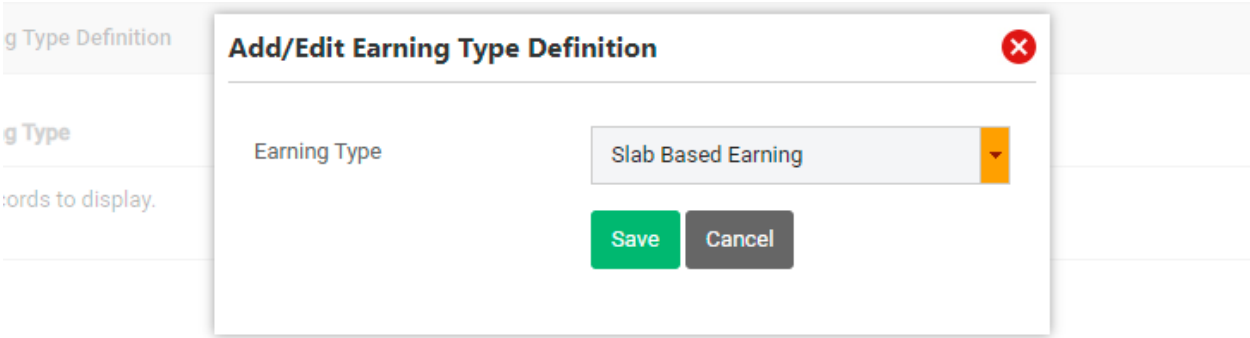
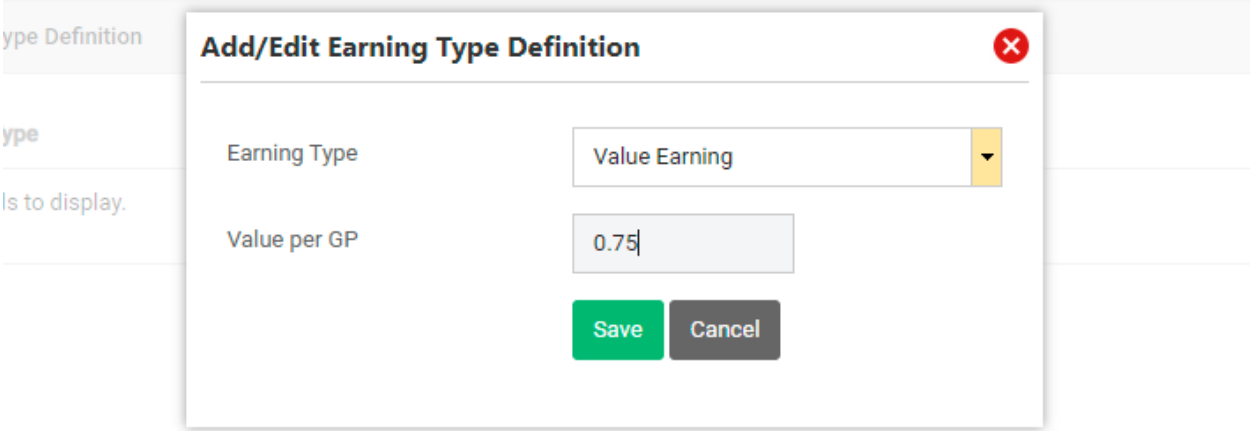
To define earnings for a month, select a month and click on New button. A pop up will be displayed. Select a type of earning for the month.



Type of earning can be- Slab Based Earning, Value% Earning, Value Earning.

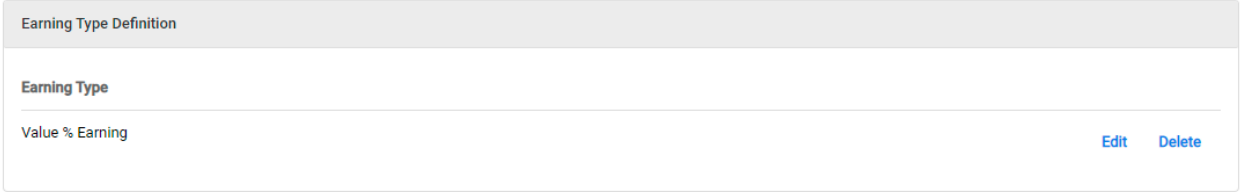
Value earning:

Value earning will simply say that one golden point is equal to what amount.



Value % Earning:

In Value % Earning mode, you will be able to define the amount equivalent of each golden point based on the achievement against what was the target set.



You can add slabs by clicking on Add button in Percentage based earnings section.

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Percentage Based Earning — Add

Lower Limit %	Upper Limit %	Value Per GP	
10	50	0.50	Edit Delete
51	79	0.65	Edit Delete
80	100	0.90	Edit Delete

Slab Based Earning:

In Slab Based Earning mode, you will be able to define a sum of amount based on the achievement against what was the target set.

Earning Type Definition

Earning Type	
Slab Based Earning	Edit Delete

You can add slabs by clicking on Add button in Fixed Value Earnings section.

Fixed Value Earning — Add

Lower Limit %	Upper Limit %	Potential Earning (AED)	
1	30	50.00	Edit Delete
31	50	100.00	Edit Delete
51	80	200.00	Edit Delete
81	100	500.00	Edit Delete

10.2 Power SKU Management

An item is referred to as Power SKU if that item is capable of giving an FSR some golden points by selling them. Using this screen, you can define whether an item is Power SKU or not. In addition to that you can also define what is the minimum quantity of that item that is to be sold in order to achieve a golden point.

Select an Organization, Sub-Channel, and a Month. Click on Search button to view the existing Power SKUs.

If selected month is future month, you will be able to modify them. Past and current month definitions cannot be modified.

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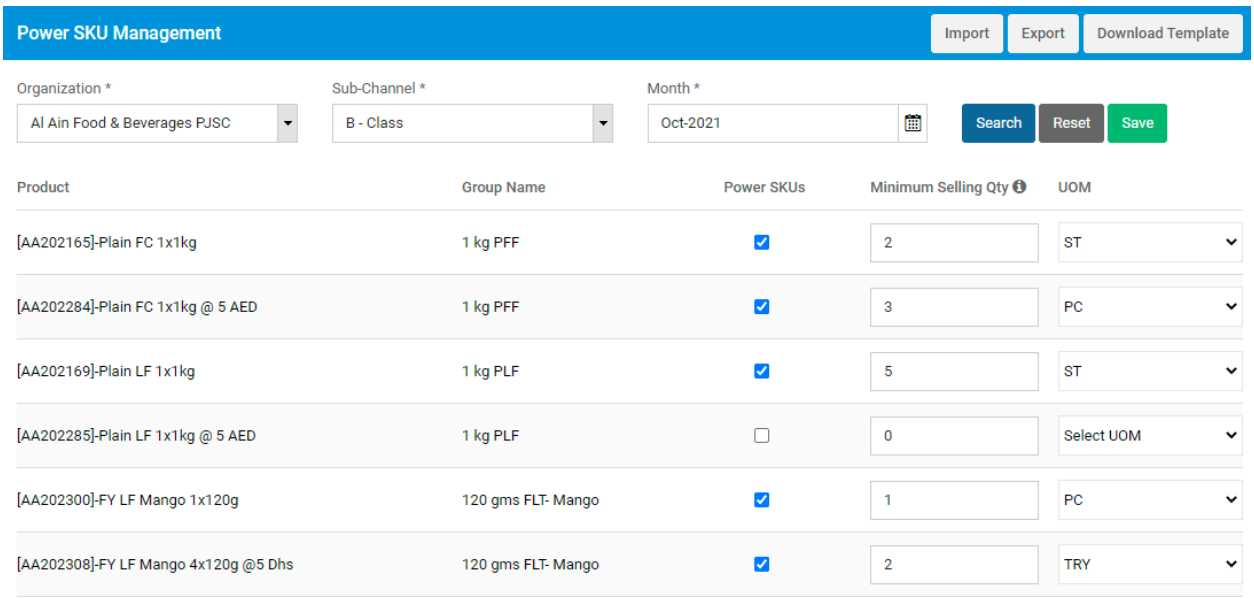


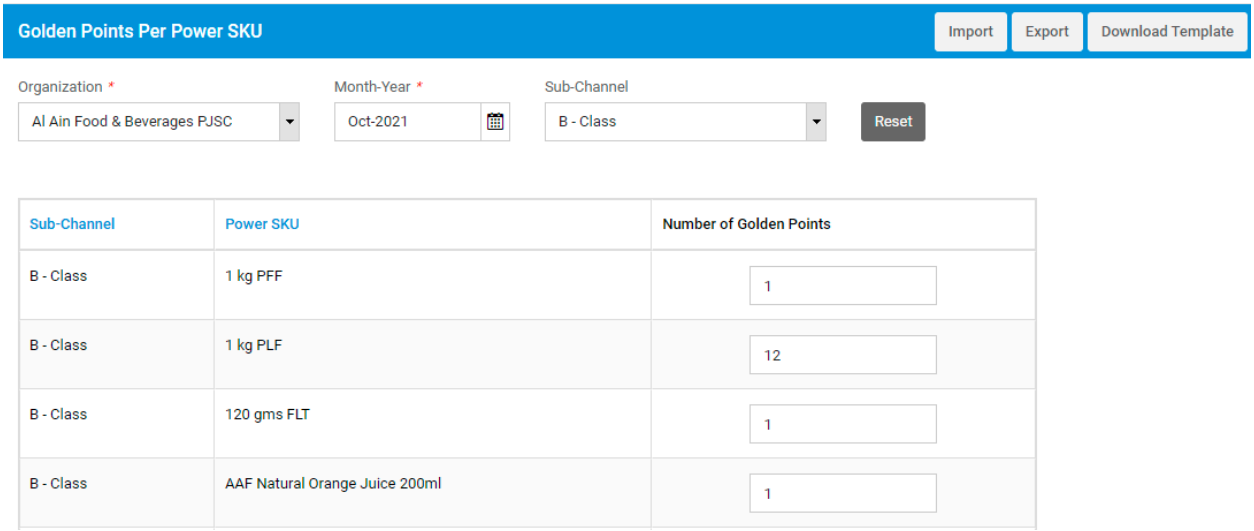
Perform the Power SKU definition and then click on Save button to save this information. Once it is saved, this set of Power SKUs will be applicable for all the customers which belongs to the Sub-Channel that was selected.

You can also import the Power SKU definition using an excel file by clicking on Import button.

10.3 Golden Points Per Power SKU

Using Golden Points Power SKU screen, you can define the number of golden points that can be achieved by selling a Power SKU, or a Power SKU group.

Select an organization, and month. The Power SKUs will be populated. Fill in the number of golden points count and then click on Save button.



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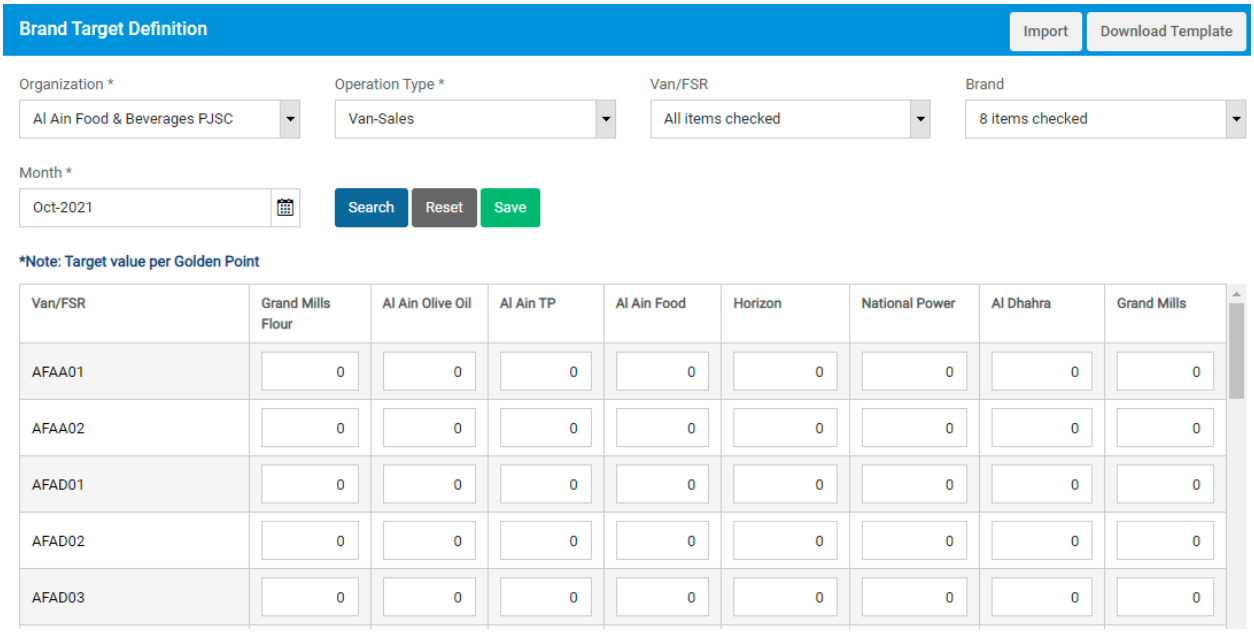
You can also import number of golden points per power SKU using an excel file by clicking on Import button.

10.4 Brand Target Definition

Using Brand Target Definition screen, you will be able to define the golden points targets that are to be achieved per brand by each FSR.

To set the targets, select an organization, operation type, FSR, Brands and a month.



Fill in the target number of golden points, and then click on Save. Targets can be defined only for future months.

You can also import golden points targets using an excel file by clicking on Import button.

10.5 Group Definition

Power SKU group is defined where more than one item is to be considered for achievement of a golden point. Using Group Definition Screen, you will be able to see the SKUs and the related Group that is defined.

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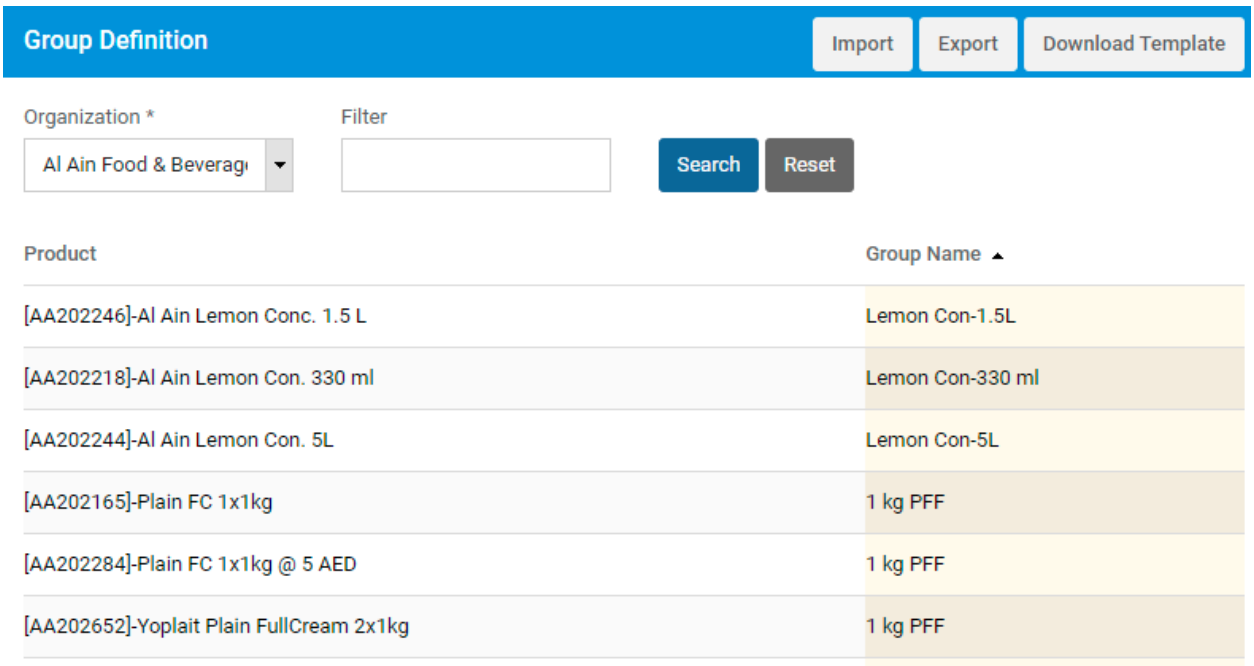

The Power SKU groups can only be defined using an excel file by clicking on Import button.

10.6 Earning Value Generation

Golden points earning value generation screen is used to confirm and lock the golden points that are achieved so far for a month. Once the earning value is generated for a month, no further addendums will be allowed.

To view the earning value, select an organization, month and operation type. You can filter the FSRs if you wish to. Then click on View Golden Points.

This will calculate the golden points achieved for the month that was selected, and then display the earning accordingly.

To confirm and lock this achievement, click on Confirm button. Golden Points earnings are to be confirmed only after a month closure is done in ERP or accounting system so that no new transactions for previous month will come through.

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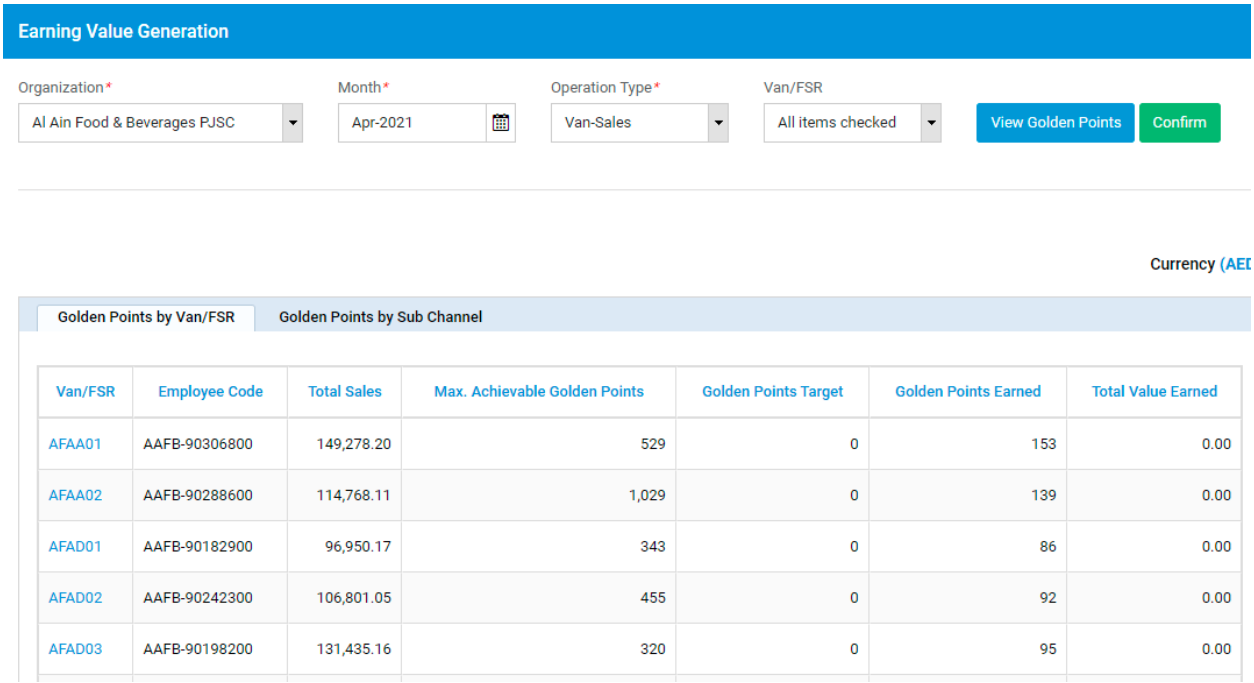


Van/FSR	Employee Code	Total Sales	Max. Achievable Golden Points	Golden Points Target	Golden Points Earned	Total Value Earned
AFAA01	AAFB-90306800	149,278.20	529	0	153	0.00
AFAA02	AAFB-90288600	114,768.11	1,029	0	139	0.00
AFAD01	AAFB-90182900	96,950.17	343	0	86	0.00
AFAD02	AAFB-90242300	106,801.05	455	0	92	0.00
AFAD03	AAFB-90198200	131,435.16	320	0	95	0.00

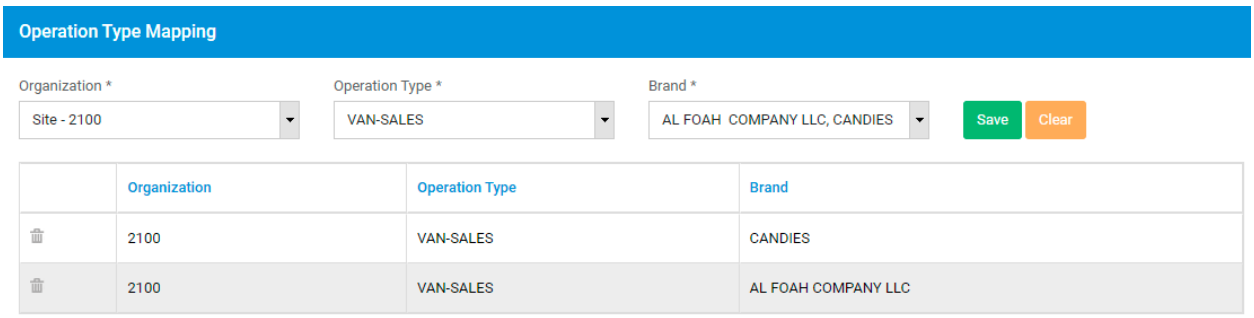
11. Sales Target

In Sales Target section, you will be able to perform the necessary mapping for sales target and define the targets per customer

11.1 Operation Type Mapping

Using Operation Type mapping, you will be able to map an Operation Type with the brands. Once this mapping is defined, you will be able to define targets only for the brands which is mapped to a user's operation type.

Select an Organization and an Operation Type from the dropdown. Currently mapped brands will be populated.



	Organization	Operation Type	Brand
	2100	VAN-SALES	CANDIES
	2100	VAN-SALES	AL FOAH COMPANY LLC

To add or modify the brand mapping for the selected operation type, click on Brand dropdown and select the desired brands.

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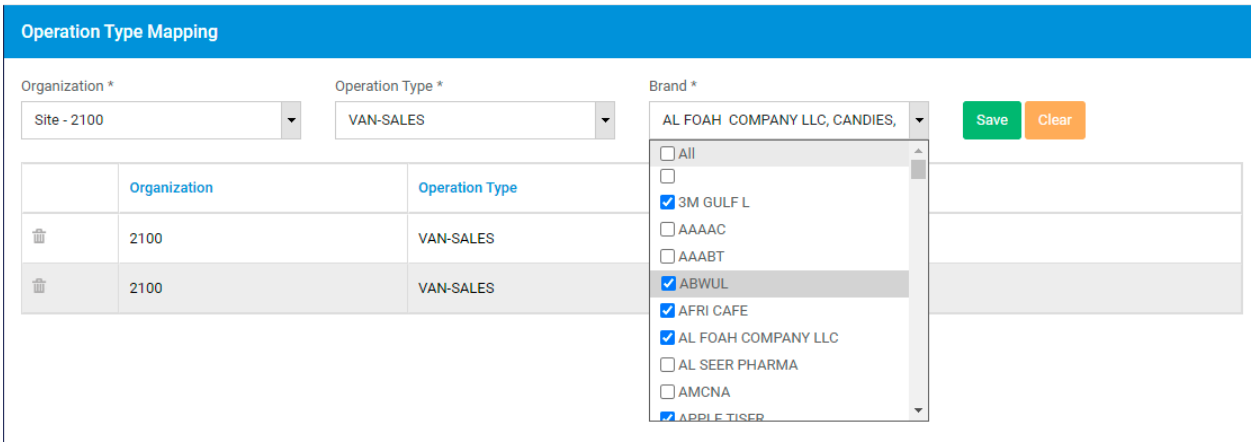
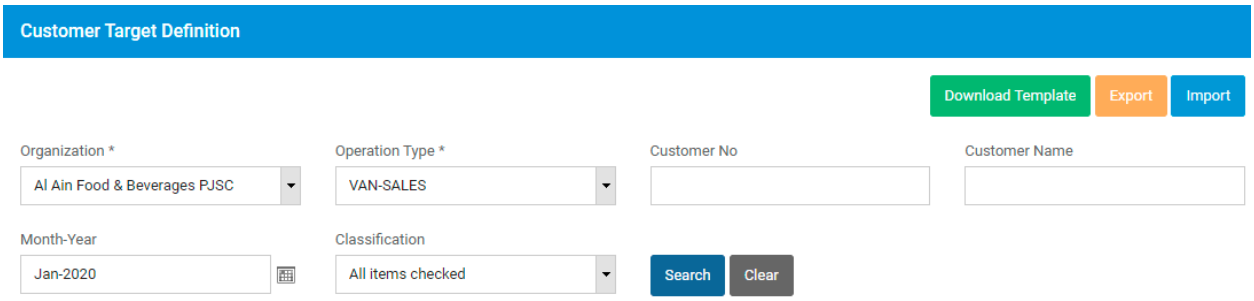


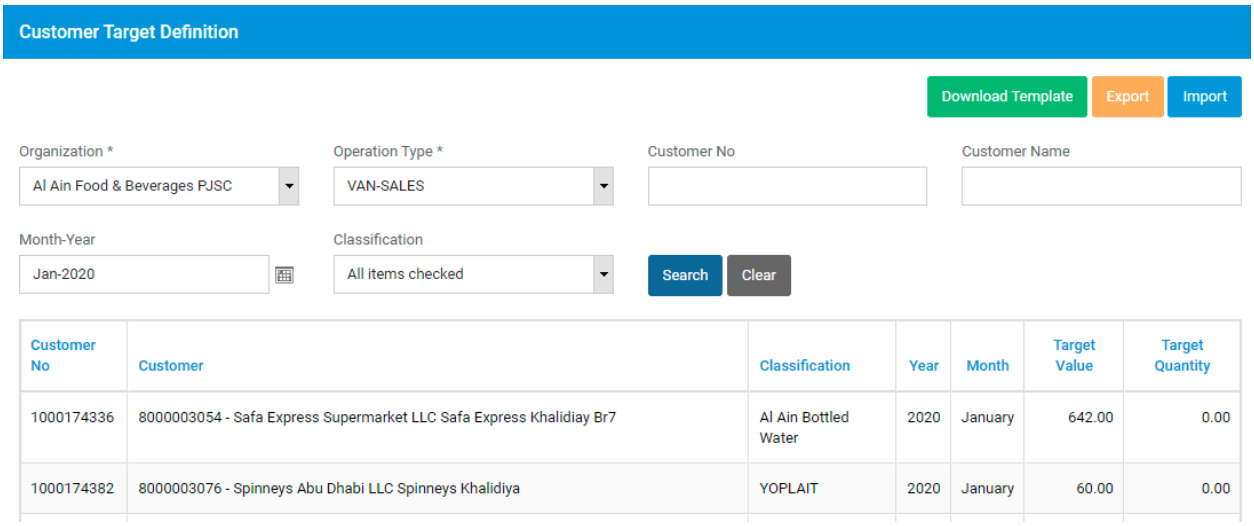
To save this mapping, click on Save button. Continue the process for other operation types as well.

11.2 Customer Target Definition

Using Customer Target Definition screen, you will be able to define targets per customer outlet.



Select an Organization, Operation Type and Month. Click on Search button to view the targets.



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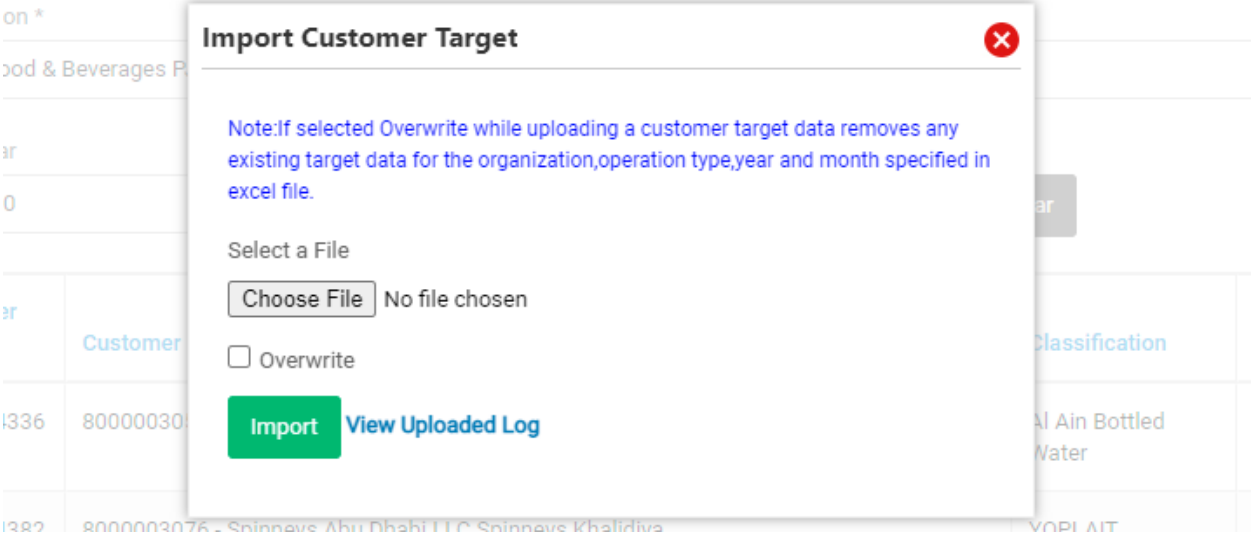
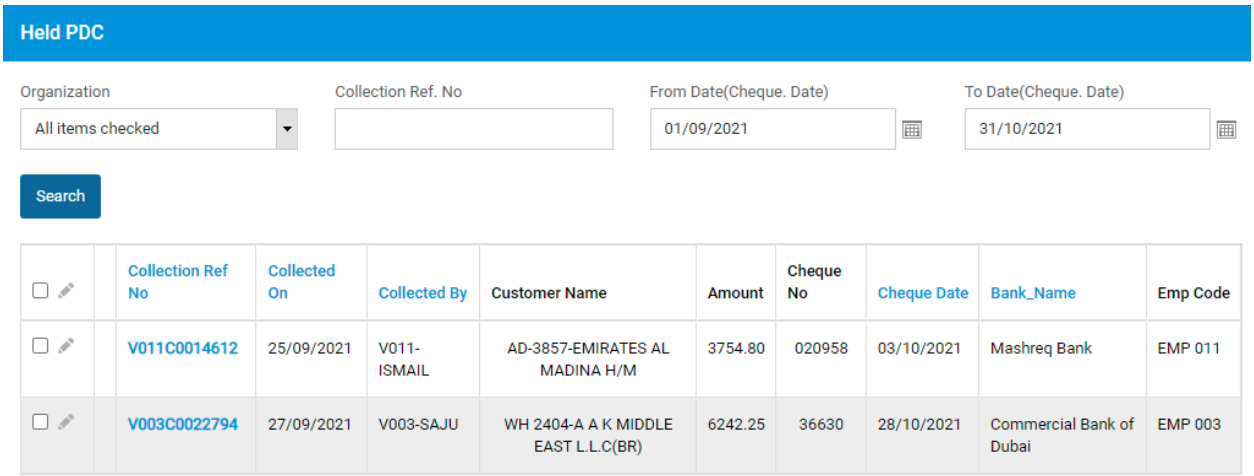
You can import the customer outlet wise sales targets using an excel file by clicking on Import button.



12. Approvals

12.1 Held PDCs

You can see all the held PDCs which are not released to the ERP in this section. You can filter the list by 'from date' and 'to date'.



Click on a Collection document to open the pop up.

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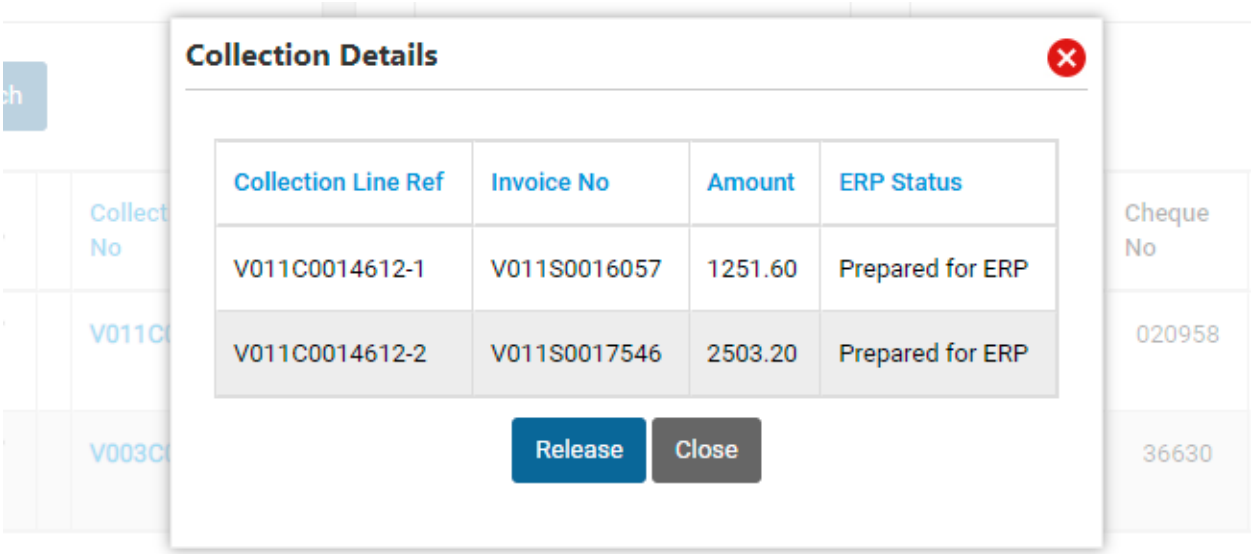
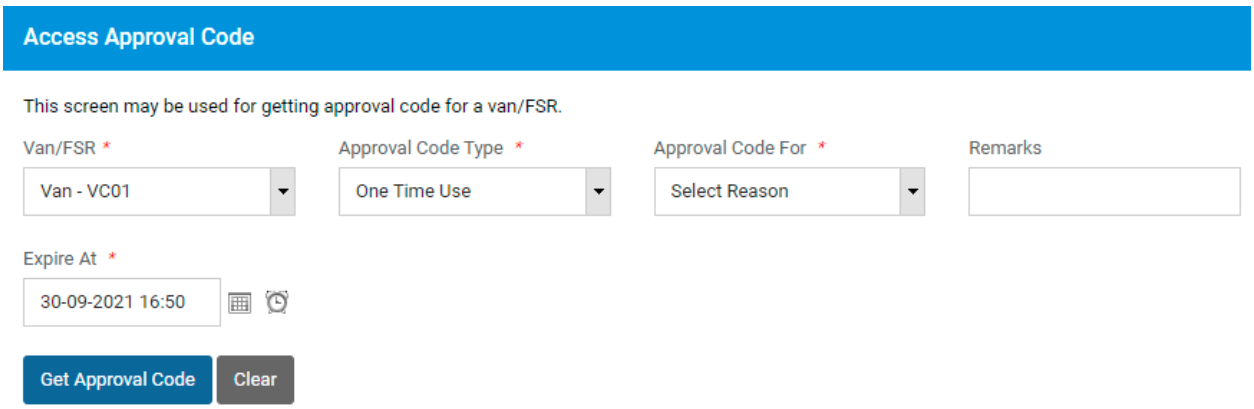


If you wish to manually release the PDC, click on Release button.

12.2 Access Approval code

You can generate approval codes for vans' for authorization purposes. These codes can be used for van load, van unload, etc.



To generate a code, select a van, Approval code type, and a reason for approval code. Based on the reason selected for approval code, additional fields will be populated.

Provide all the required information.

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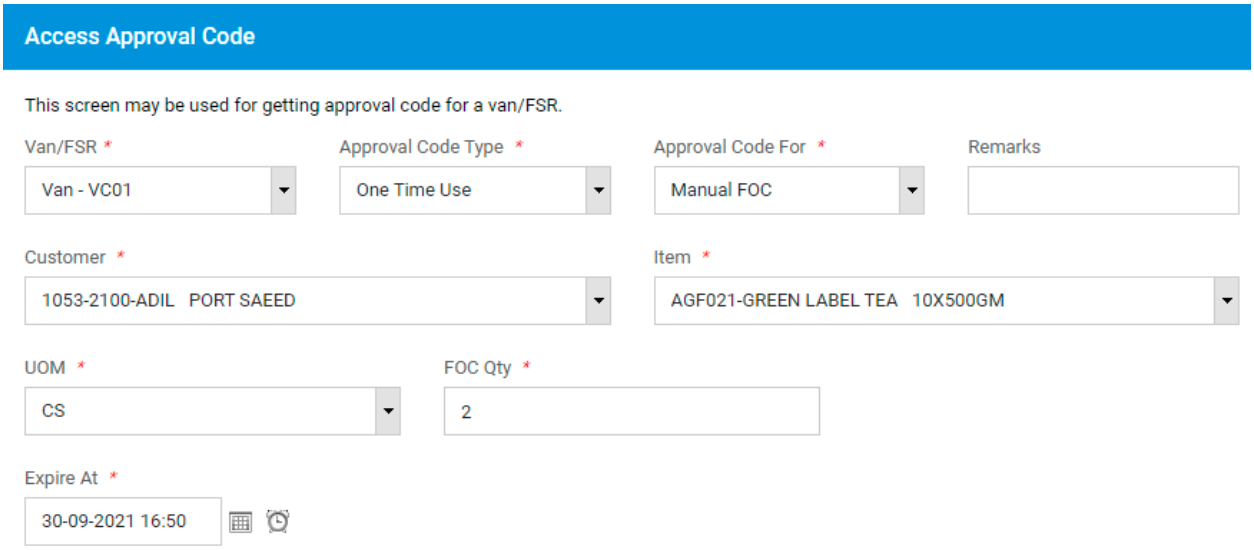
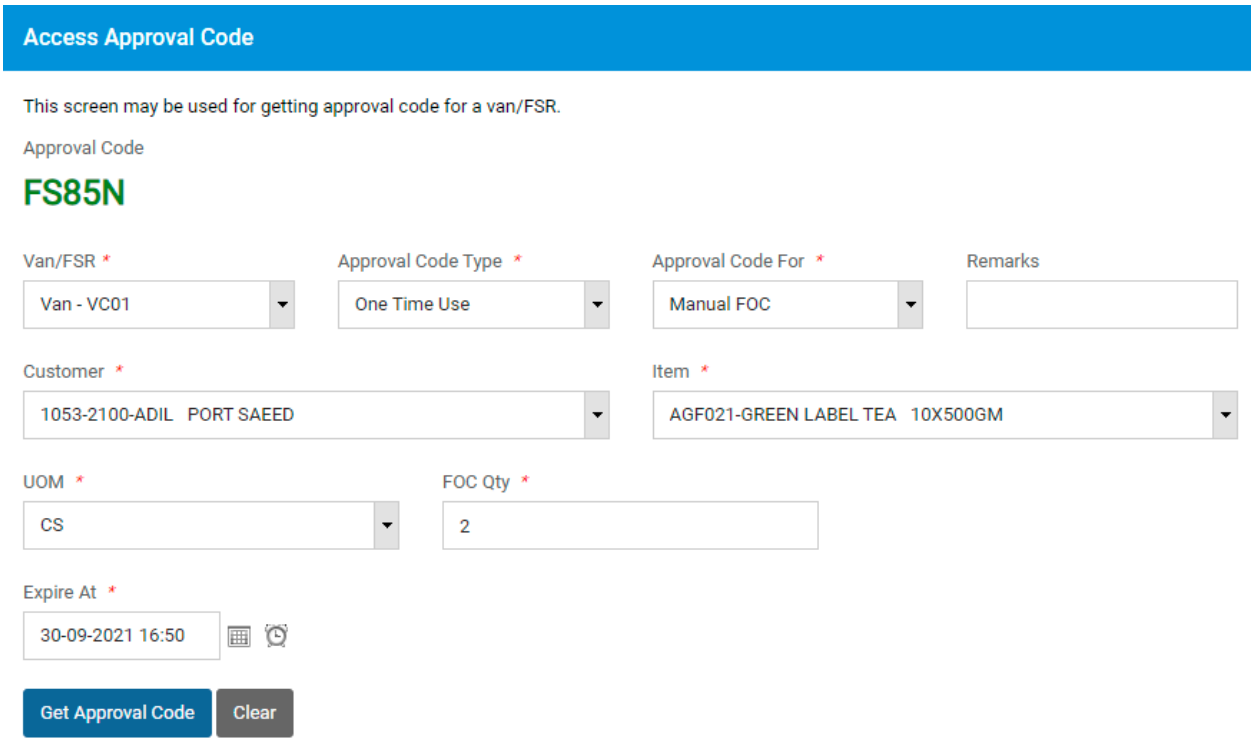


Click on Get Approval Code button to generate the code.



This code is to be communicated with the FSR.

12.3 Held New Customer

This screen can be used to review and release the orders of all the cash customers to ERP or accounting system.

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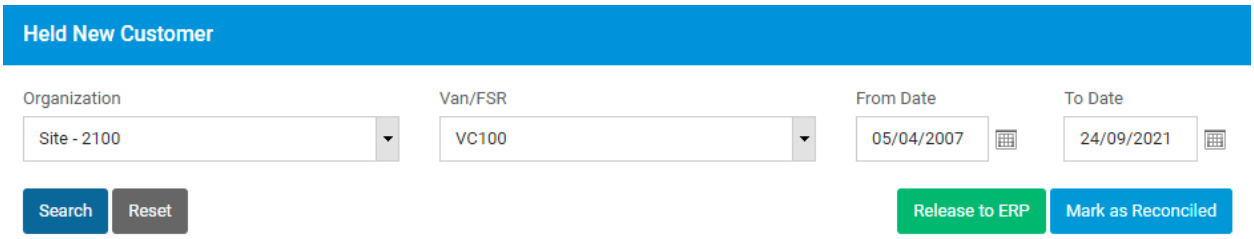
Select the organization, van and the date range. Click on Search to populate the orders of Cash customers which are not yet Released or reconciled.

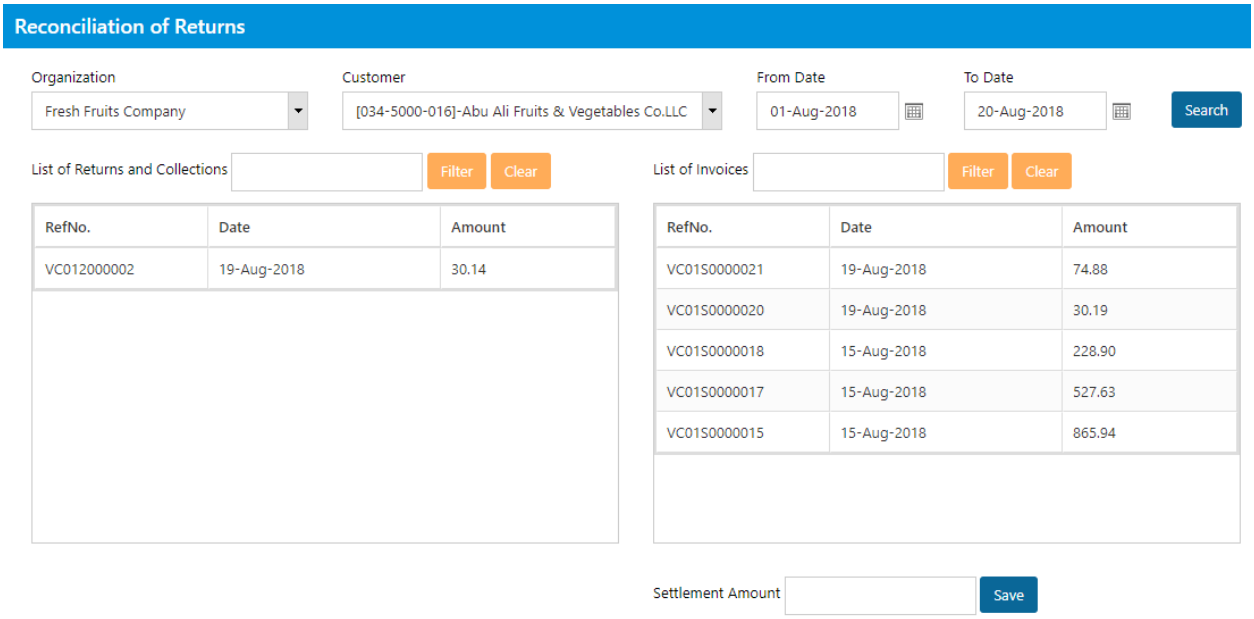


Select the transactions which are to be released to ERP or to Mark as Reconciled.

Click on the buttons to perform the desired action on the transactions.

12.4 Reconcile Returns

You can settle the credit notes and payment collections against invoices in this screen. To view all the unsettled credit notes or payment collections for a customer, select a customer and then choose from and to dates. Click on Search.



You can see the list of credit notes and unallocated collections on the left side of screen. You will be able to see the list of open invoices on the right side of the screen.

Click on the credit note/collection to select document that you wish to settle against the open invoice. Click to select an invoice which will be settled. Enter the Settlement amount.

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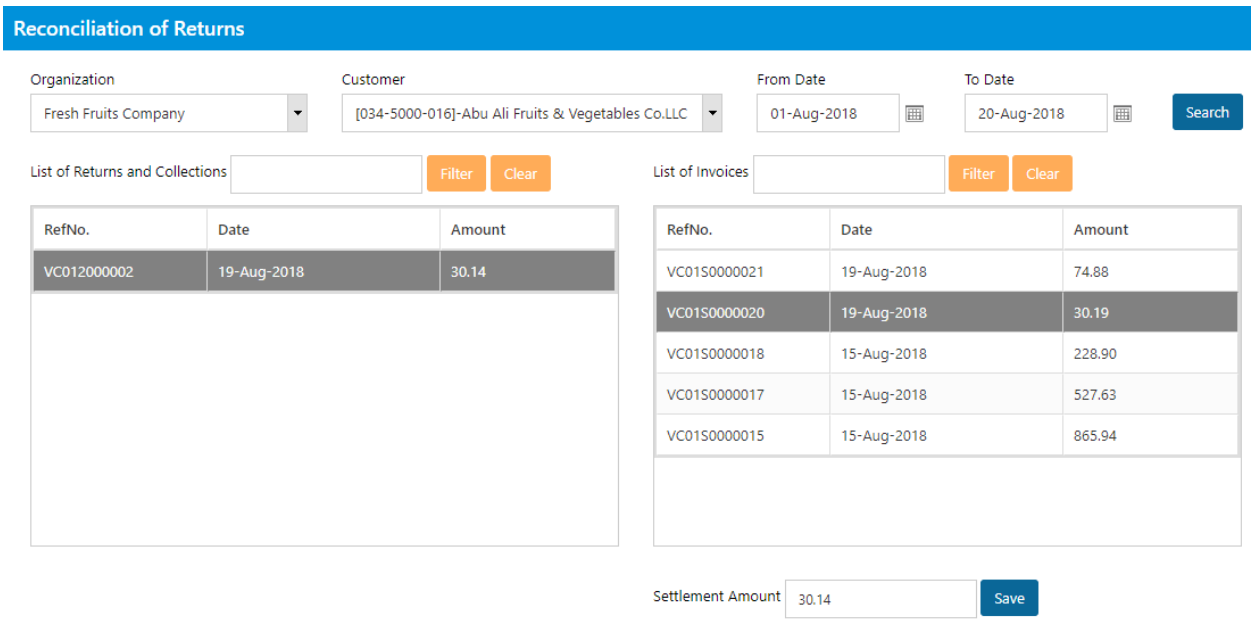
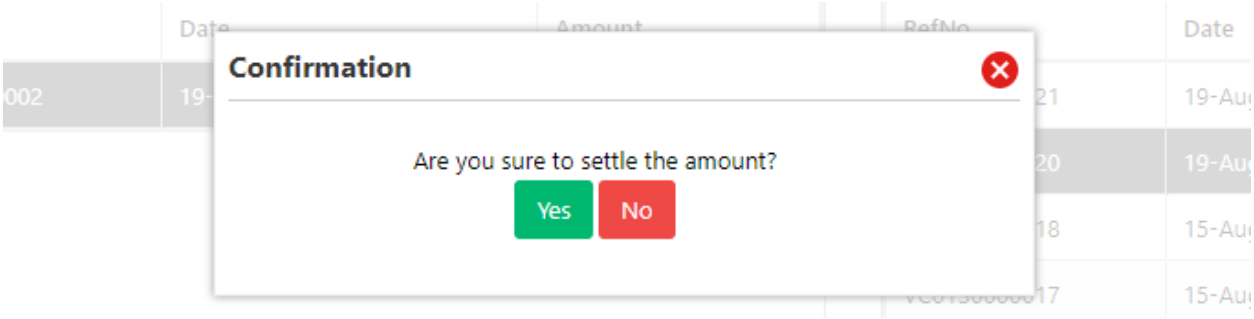


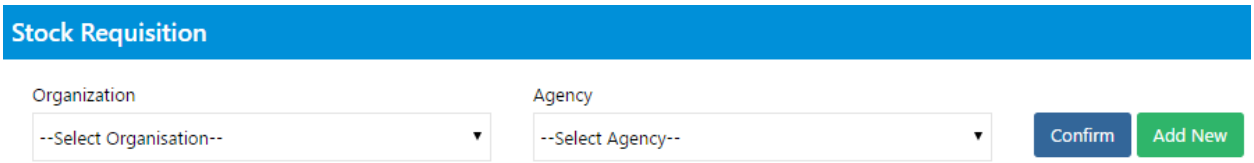
Click on Save to proceed with the settlement.



A confirmation pop up will be displayed. Click on Yes to confirm the settlement.

12.5 Stock Requisition

You can approve the stock requests came from FSRs in this section.



To approve a stock request, select the organization, and agency.

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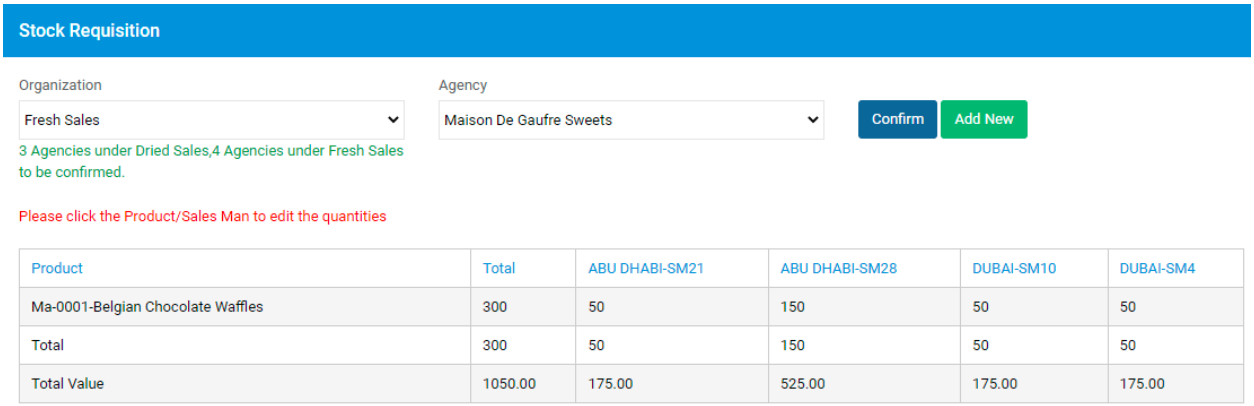
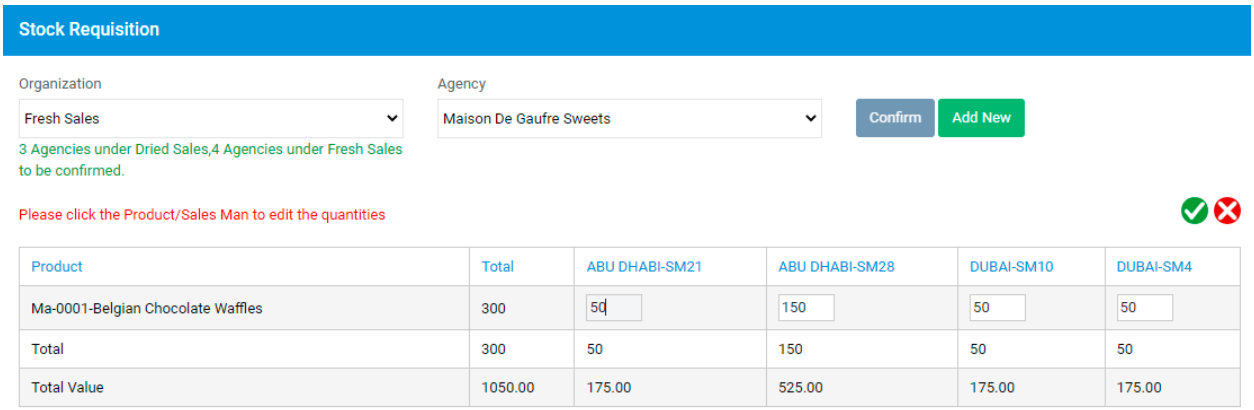


Product	Total	ABU DHABI-SM21	ABU DHABI-SM28	DUBAI-SM10	DUBAI-SM4
Ma-0001-Belgian Chocolate Waffles	300	50	150	50	50
Total	300	50	150	50	50
Total Value	1050.00	175.00	525.00	175.00	175.00

You can see the list of products to be confirmed under the selected agency.

Click on the quantity to edit the quantity.



Product	Total	ABU DHABI-SM21	ABU DHABI-SM28	DUBAI-SM10	DUBAI-SM4
Ma-0001-Belgian Chocolate Waffles	300	50	150	50	50
Total	300	50	150	50	50
Total Value	1050.00	175.00	525.00	175.00	175.00

Click on tick mark to save the edited quantity.

Click on 'Confirm' to confirm the stock allocation.

You will be displayed with a page with available stock details and requested quantity. You can verify whether the requested stock is available, and allocate accordingly.

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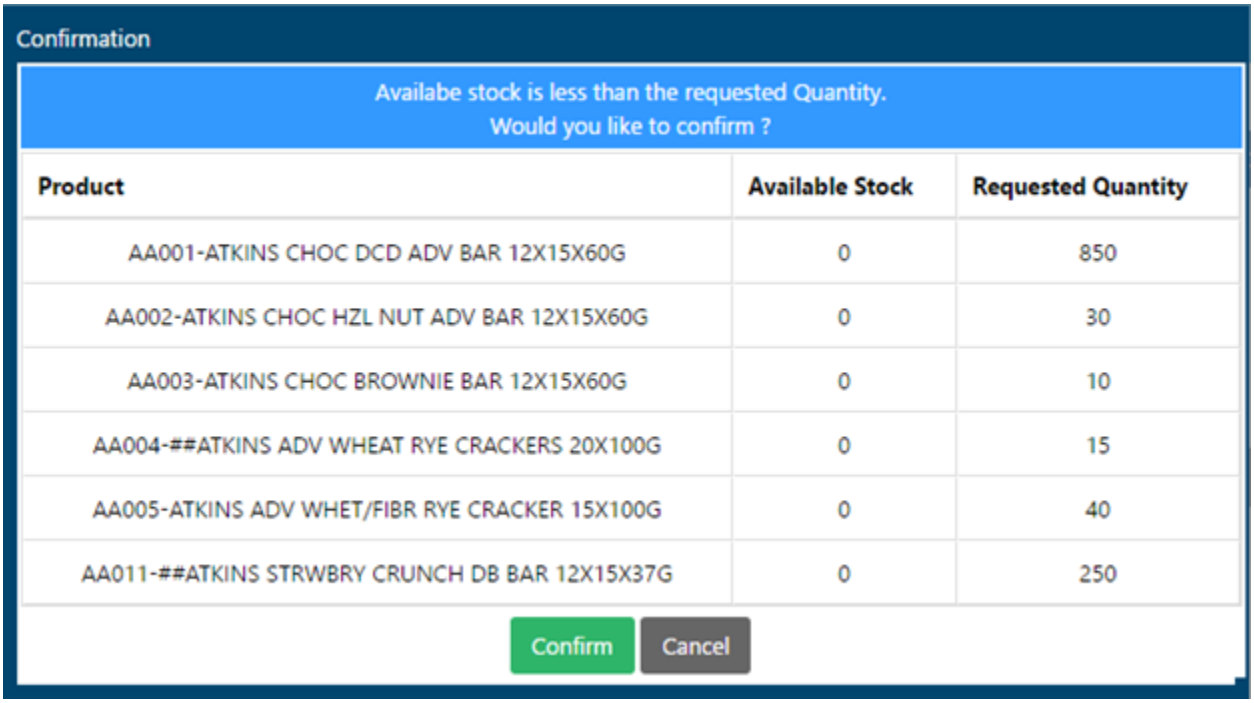
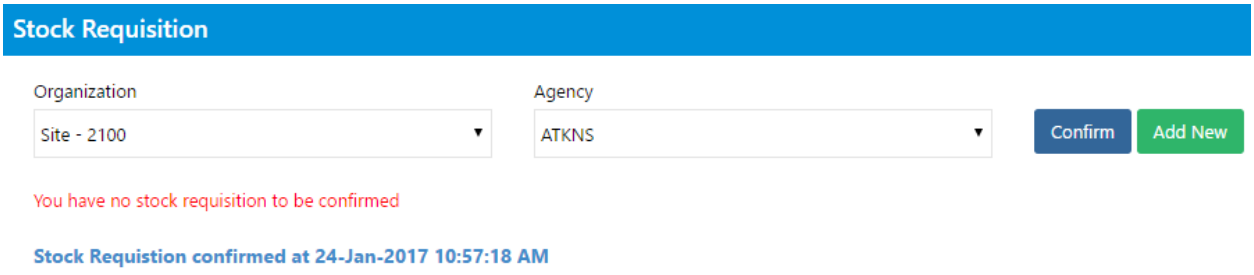


Click on 'Confirm' to confirm stock allocation.



12.6 Import Van Load

You can import a van load definition using an excel file created in the specific format. To import, go to Import Van Load.

Select organization and Van.

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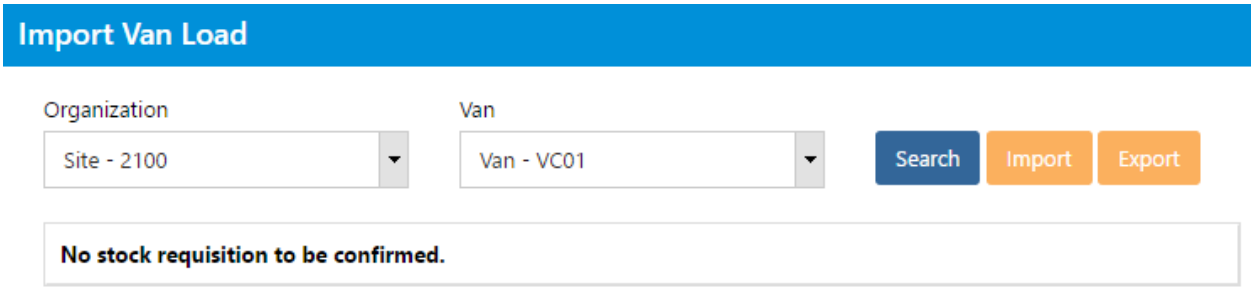
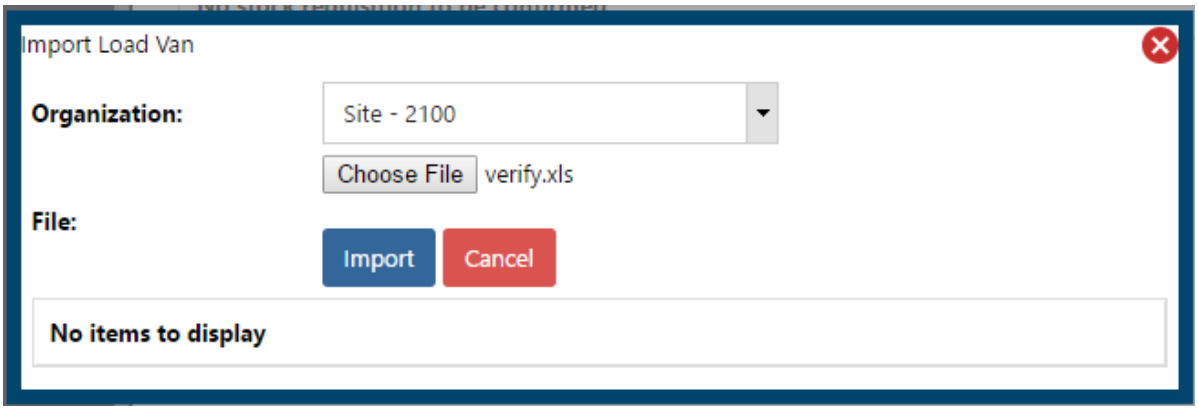


A pop up will be appeared. Select organization and choose a file.



Click on Import button to import van load.

12.7 Return Notes

In Return Notes screen, you will be able to see the return requests placed by the FSRs. You can either approve or reject them. The approved ones will be converted to a Credit note, and the rejected ones will be discarded.

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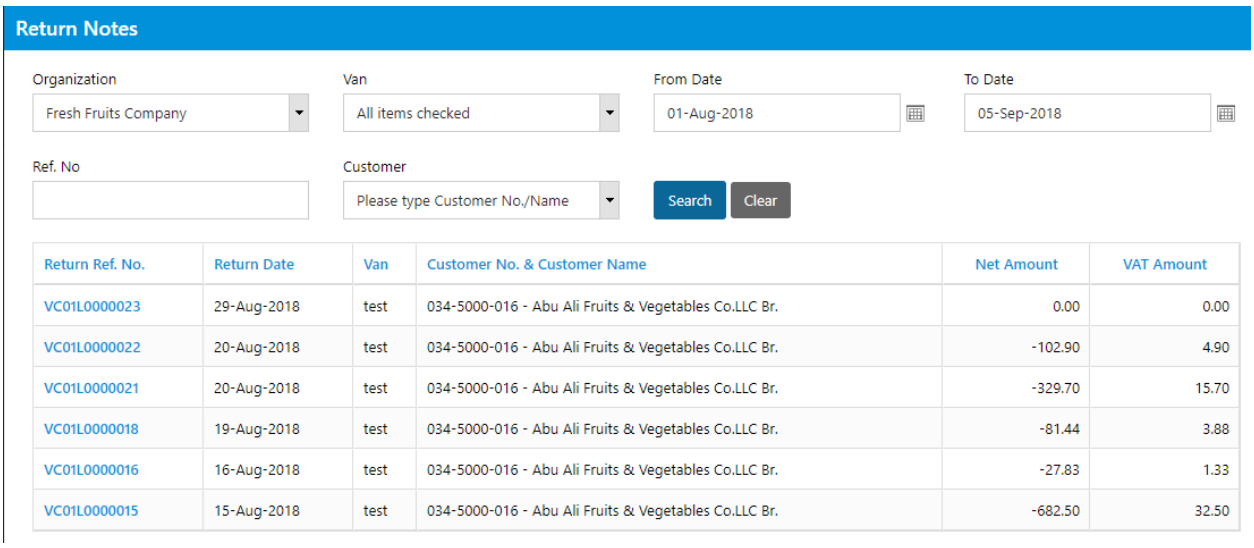
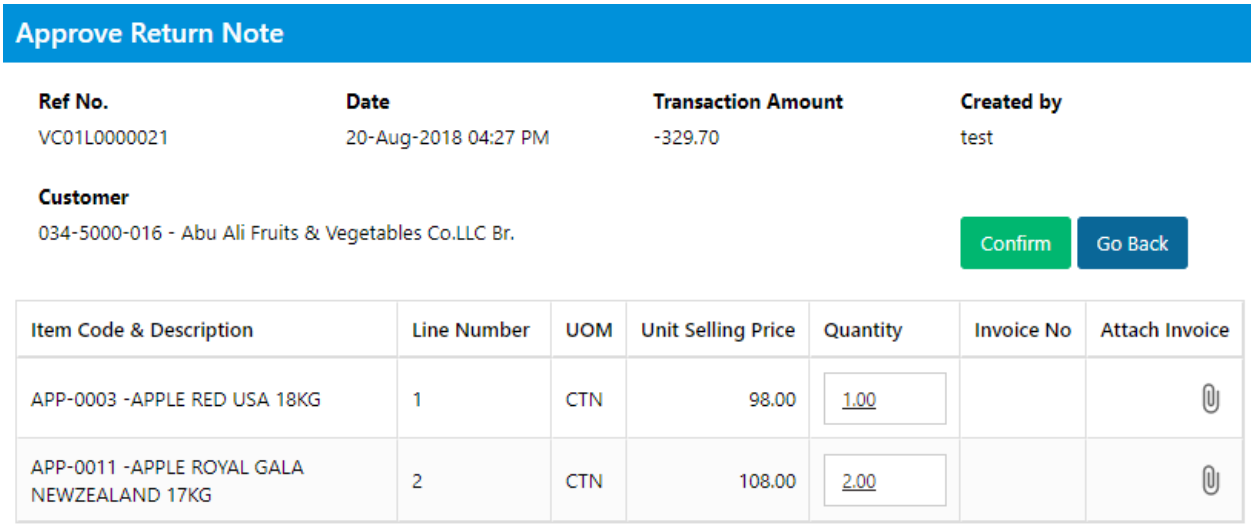


Return Ref. No.	Return Date	Van	Customer No. & Customer Name	Net Amount	VAT Amount
VC01L0000023	29-Aug-2018	test	034-5000-016 - Abu Ali Fruits & Vegetables Co.LLC Br.	0.00	0.00
VC01L0000022	20-Aug-2018	test	034-5000-016 - Abu Ali Fruits & Vegetables Co.LLC Br.	-102.90	4.90
VC01L0000021	20-Aug-2018	test	034-5000-016 - Abu Ali Fruits & Vegetables Co.LLC Br.	-329.70	15.70
VC01L0000018	19-Aug-2018	test	034-5000-016 - Abu Ali Fruits & Vegetables Co.LLC Br.	-81.44	3.88
VC01L0000016	16-Aug-2018	test	034-5000-016 - Abu Ali Fruits & Vegetables Co.LLC Br.	-27.83	1.33
VC01L0000015	15-Aug-2018	test	034-5000-016 - Abu Ali Fruits & Vegetables Co.LLC Br.	-682.50	32.50

Click on a Return request document number to view more details related to that specific return request.



Item Code & Description	Line Number	UOM	Unit Selling Price	Quantity	Invoice No	Attach Invoice
APP-0003 -APPLE RED USA 18KG	1	CTN	98.00	1.00		
APP-0011 -APPLE ROYAL GALA NEWZEALAND 17KG	2	CTN	108.00	2.00		

You will be able to see the items available in the return request. Click on button to attach an invoice against the line item.

All the invoices in which that specific item was sold, will be listed. Click on an invoice to take return against it, and then enter the returning quantity.

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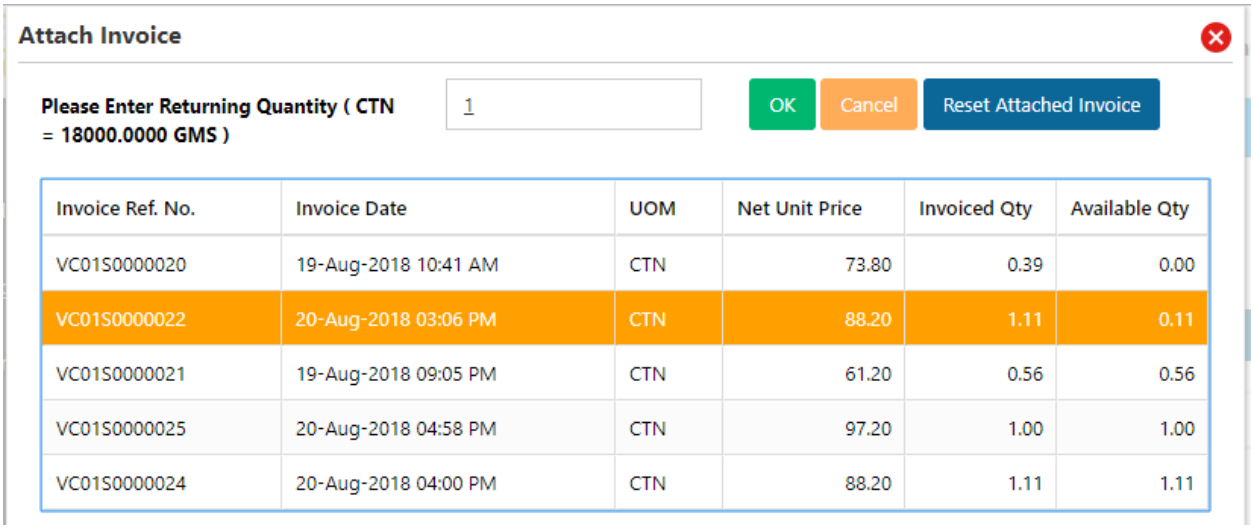
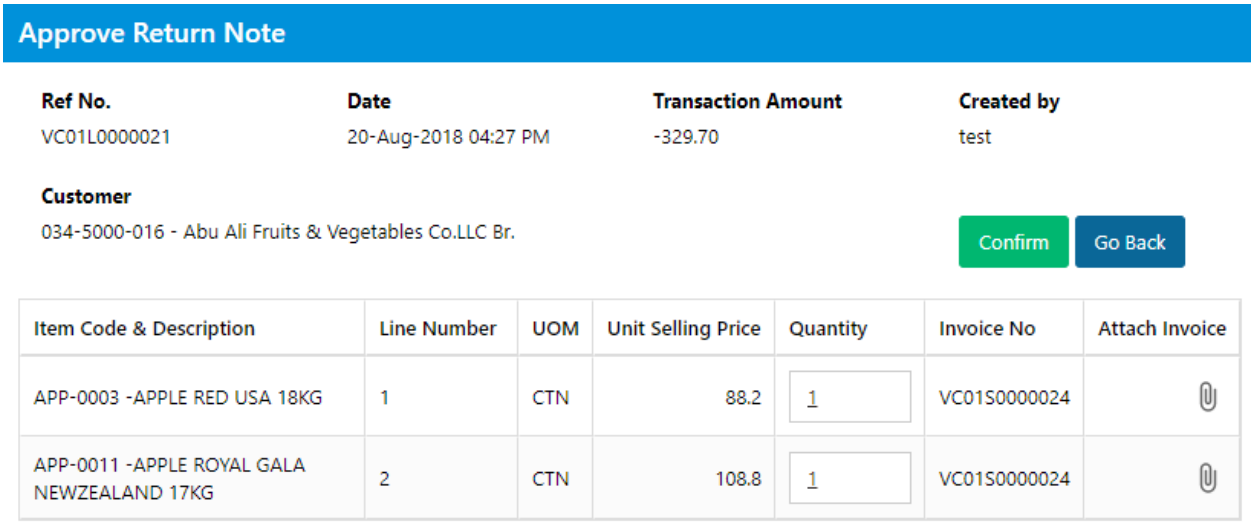


Invoice Ref. No.	Invoice Date	UOM	Net Unit Price	Invoiced Qty	Available Qty
VC01S0000020	19-Aug-2018 10:41 AM	CTN	73.80	0.39	0.00
VC01S0000022	20-Aug-2018 03:06 PM	CTN	88.20	1.11	0.11
VC01S0000021	19-Aug-2018 09:05 PM	CTN	61.20	0.56	0.56
VC01S0000025	20-Aug-2018 04:58 PM	CTN	97.20	1.00	1.00
VC01S0000024	20-Aug-2018 04:00 PM	CTN	88.20	1.11	1.11

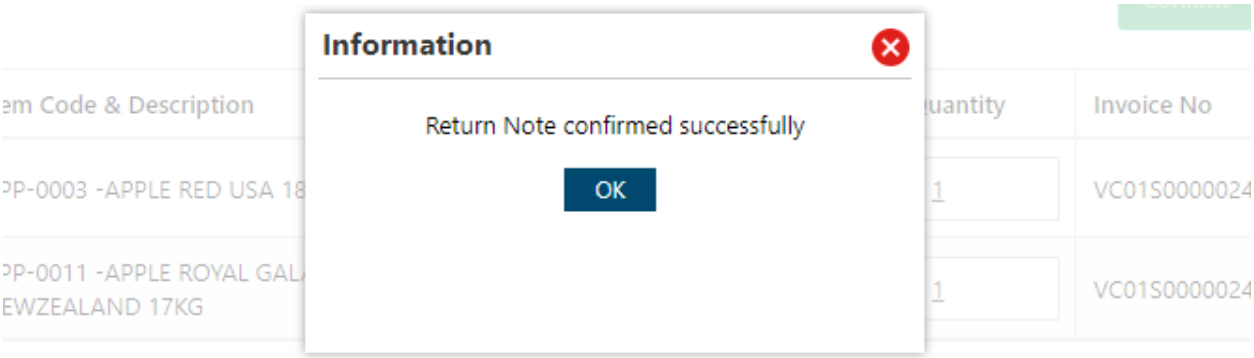
Click on OK button.



Item Code & Description	Line Number	UOM	Unit Selling Price	Quantity	Invoice No	Attach Invoice
APP-0003 -APPLE RED USA 18KG	1	CTN	88.2	1	VC01S0000024	
APP-0011 -APPLE ROYAL GALA NEWZEALAND 17KG	2	CTN	108.8	1	VC01S0000024	

Continue the process of attaching invoices to line items. Once completed, click on Confirm.

You will receive a confirmation message after it is confirmed.



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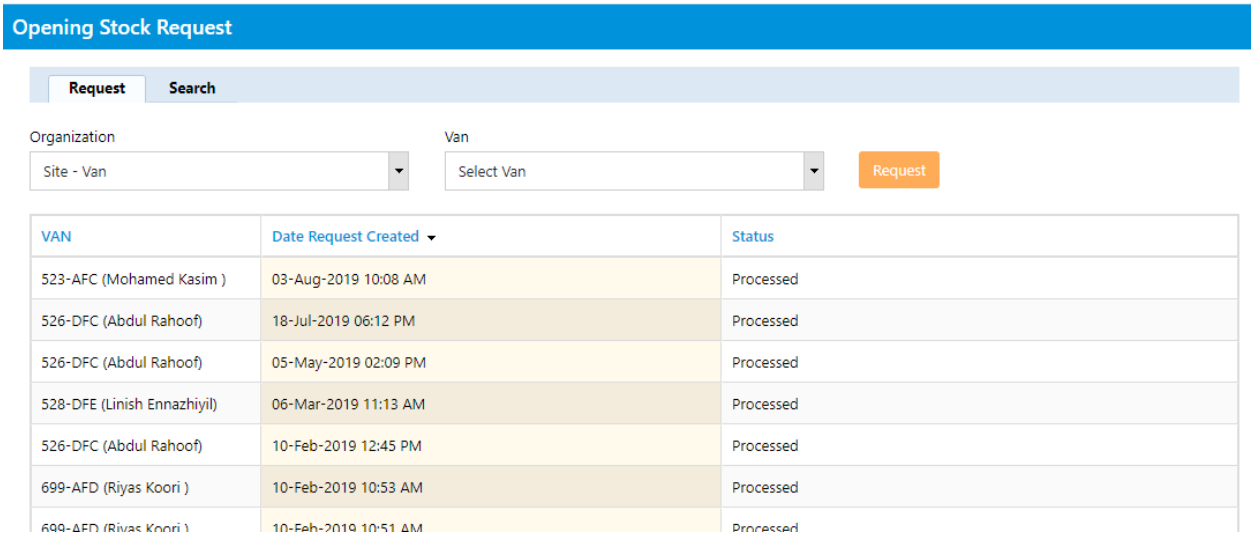
12.8 Opening Stock Request

Using this screen, you will be able to request the system to fetch the opening stock for the vans as they are being received from ERP.

This is to be done only in case of new activation or reconciliation of van stock. Opening stock will be considered for van load only if the current van stock is empty.



Select the **Organization** and the **Van** from the drop down.

Click on **Request** button.

The current stock level as in ERP system will be sent to android application as a load sheet.

This can then be confirmed in mobile application to match with the stock level as in ERP.

12.9 Unconfimed Stock Requests

You can review and confirm all the unconfirmed stock requests using this screen. Select an organization and van. All the unconfirmed stock requests will be displayed.

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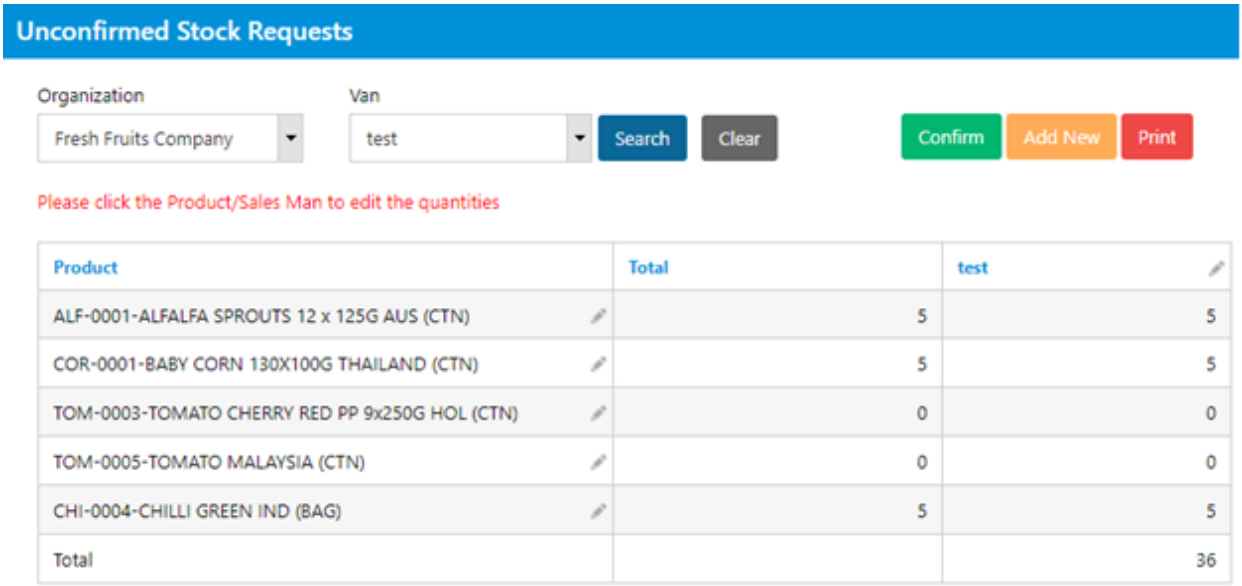
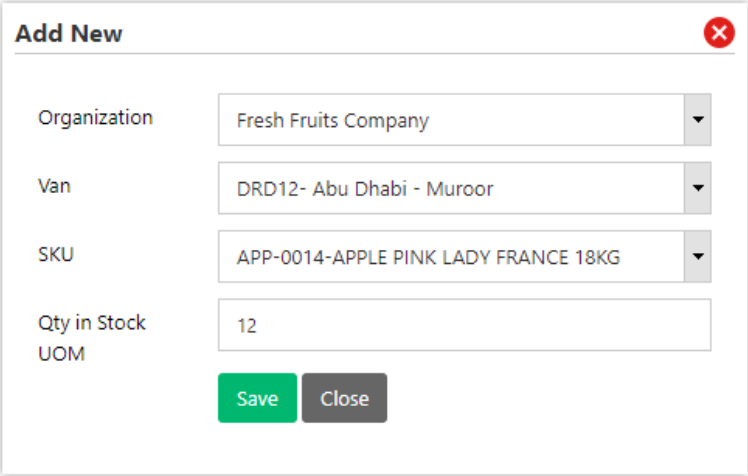


If you wish to edit quantity, click on the desired quantity and update the value of cell. To save the changes made, click on button. To discard the changes, click on button. In order to edit multiple entries at a time, click on either a Product name, or on the Van name.

In order to add new products, click on Add New button.



Select Van, SKU, and enter the Quantity. Click on Save to save the changes. Click on Close to discard the changes.

If you like to print the stock request, click on Print button. A PDF file will be generated, open the file and then you can print it.

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To confirm a stock request and convert it to a Van Load (or to send this request to ERP- based on configuration), click on Confirm button. The request will then be converted as a van load (or send request to ERP).

12.10 Collection Review and Approval

Collection Review & Approval screen can be used to review all the collection documents that are created in SalesWorx and post these data to ERP.

You can fetch the collection documents by Van name and date. Once you fetch these collection documents, it will be displayed in the table as below.

Collection Review & Approval

Click arrow to expand/collapse the search area

Hover on icon to view search criteria

Collection Ref No	Collected On	Collected By	Customer	Pay.Type	Amount	Discount	Status	Review
DFCPR000003	19-Jan-2019	Van - DFC	49941-Wadi Al Madeena S/M (DXB)	CASH	2,500.00	0.00	Waiting for Approval	Review
DFEPR000013	19-Jan-2019	Van - DFE	60911-MASTEROO GENEREAL TRADING LLC (DXB)	CASH	3,186.00	0.00	Waiting for Approval	Review
DFEPR000012	19-Jan-2019	Van - DFE	60911-MASTEROO GENEREAL TRADING LLC (DXB)	CASH	3,564.00	0.00	Waiting for Approval	Review
DFEPR000011	19-Jan-2019	Van - DFE	60911-MASTEROO GENEREAL TRADING LLC (DXB)	CASH	3,564.00	0.00	Waiting for Approval	Review
DFEPR000010	19-Jan-2019	Van - DFE	60911-MASTEROO GENEREAL TRADING LLC (DXB)	CASH	3,564.00	0.00	Waiting for Approval	Review
DFEPR000009	19-Jan-2019	Van - DFE	60911-MASTEROO GENEREAL TRADING LLC (DXB)	CASH	3,564.00	0.00	Waiting for Approval	Review
AFCPR000002	19-Jan-2019	Van - AFC	39426-ABDUL AZEEZ -Grocery	CASH	305.94	0.00	Waiting for Approval	Review

In order to review and confirm these documents, click on Review button against the line item. A new screen will be displayed.

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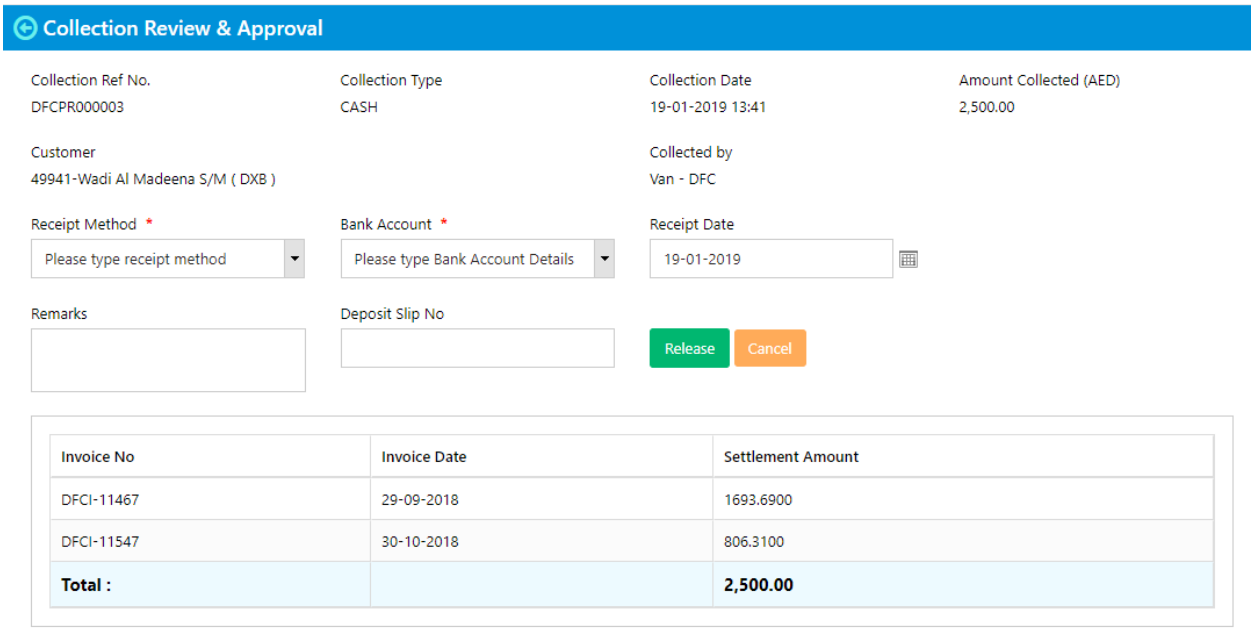


The invoices against which the collection is received will be listed at bottom of the screen.

Select a Receipt Method and Bank Account from the dropdown. Choose the Receipt date.

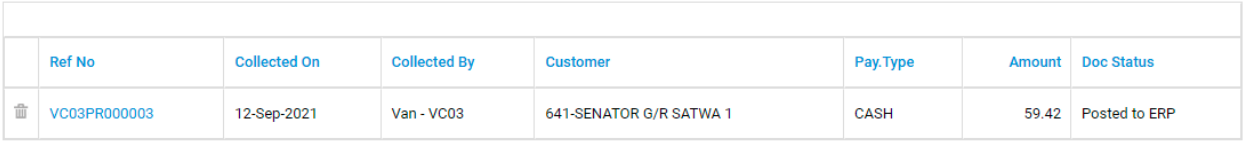
Enter the Remarks and Deposit Slip number, if available.

Click on Release button in order to post this document to ERP. Click on Cancel button to clear all the changes done in this screen.

12.11 Collection Deletion Request

This screen can be used for any data correction wherein a collection entry is wrongly entered in mobile application. Requesting a deletion will only delete the transaction details in SalesWorx back office and handheld device. The invoices that were impacted by this Collection document has to be manually corrected in ERP. Deletion of this data from the device(s) will be done only on successful completion of a full sync process by the respective device(s).

Select an organization, van, collection reference number, or date range to filter the collection documents. Click on Search button.



	Ref No	Collected On	Collected By	Customer	Pay.Type	Amount	Doc Status
	VC03PR000003	12-Sep-2021	Van - VC03	641-SENATOR G/R SATWA 1	CASH	59.42	Posted to ERP

Click on Delete button against the document.

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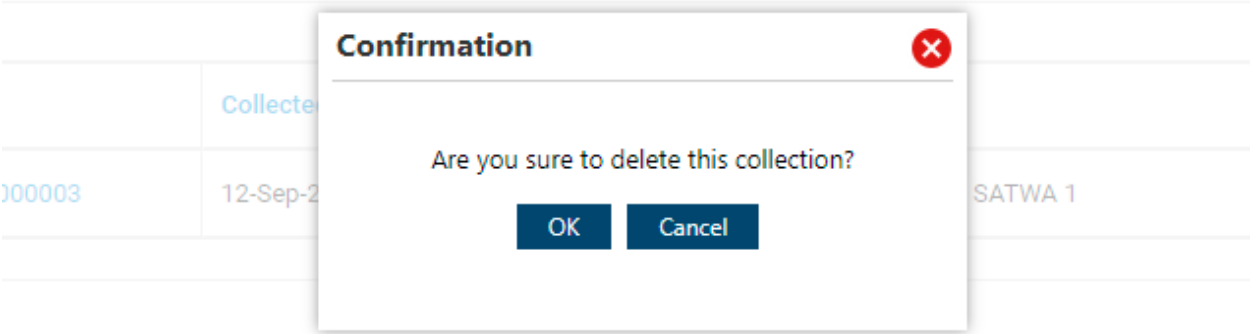
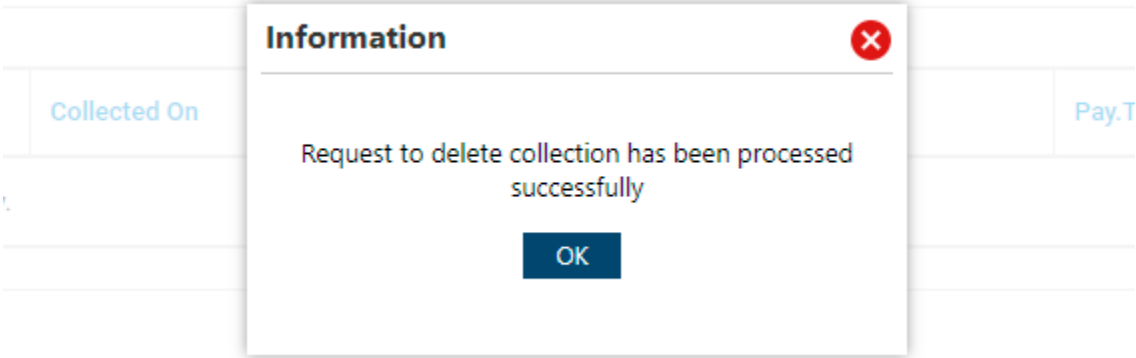


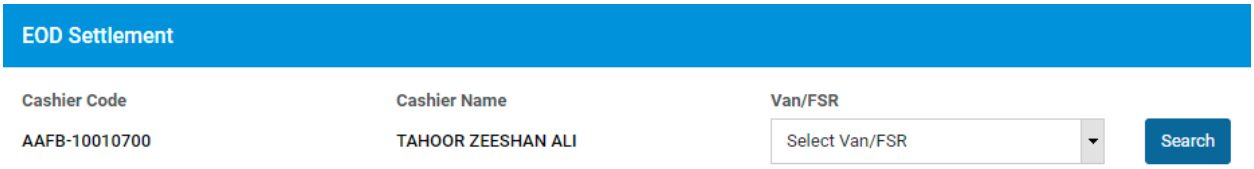
Click on OK button to confirm.



12.12 EOD Settlement

End of day settlement screen is used to settle the cash, cheques, and coupons that are received from FSR. This screen can also be used to record the POD that are received.

This screen can be used only by the users with designation as 'Cashier'.



The Cashier's employee code and name will be displayed.

Select an FSR from Van/FSR dropdown. Click on Search button.

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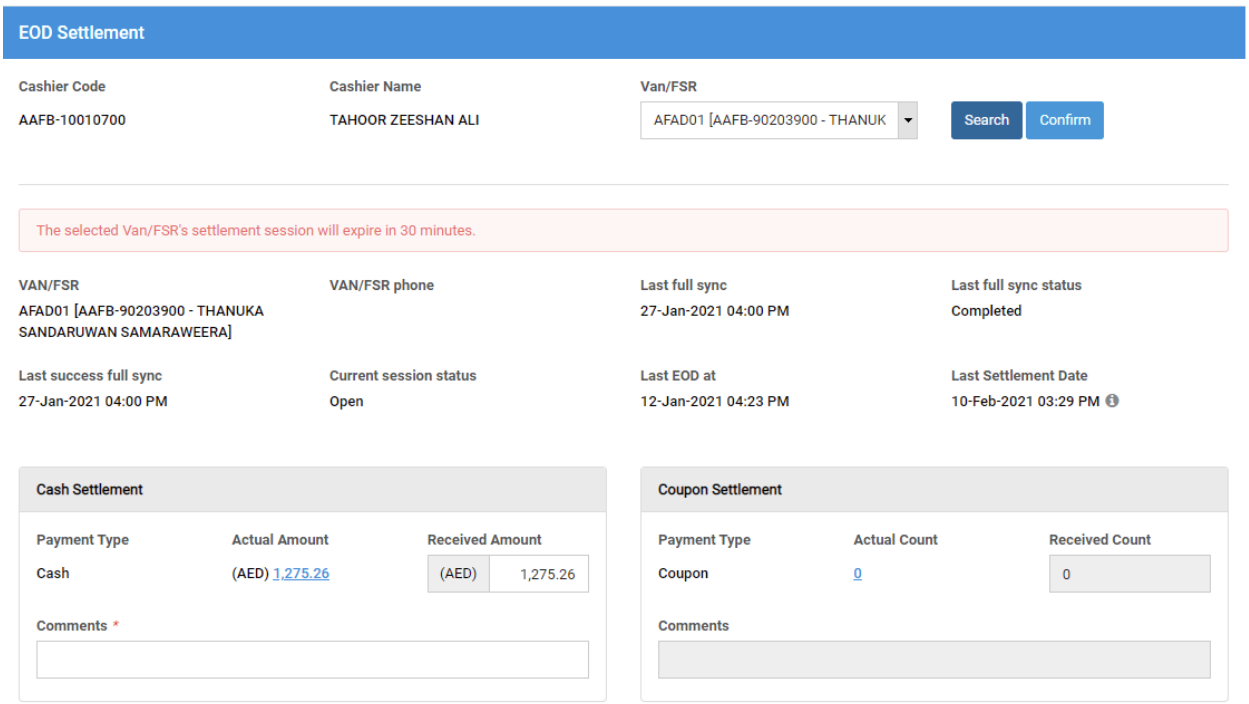


EOD Settlement screen will be displayed.

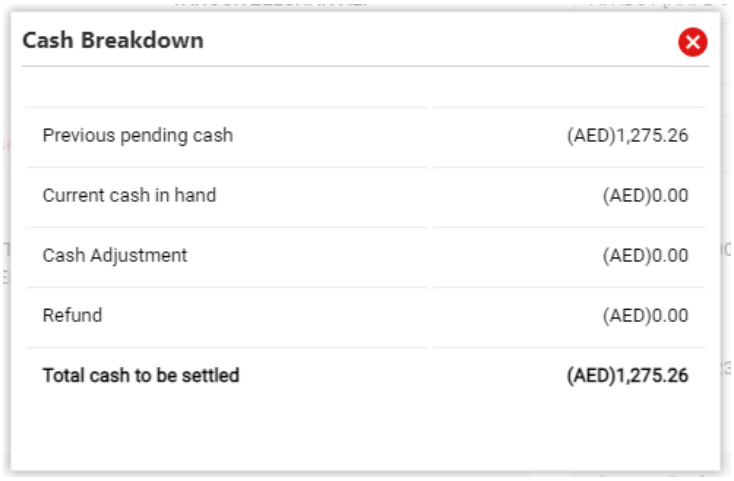
Details related to last full sync and last settlement will be displayed.

Cash Settlement:

In Cash settlement section user will be settling the amount that he received from the FSR.

Enter the collected amount in Received Amount field. Enter the comments if any.

As per the system, the cash that is to be collected from FSR will be displayed against actual amount. Click on the amount to view the detailed breakdown.



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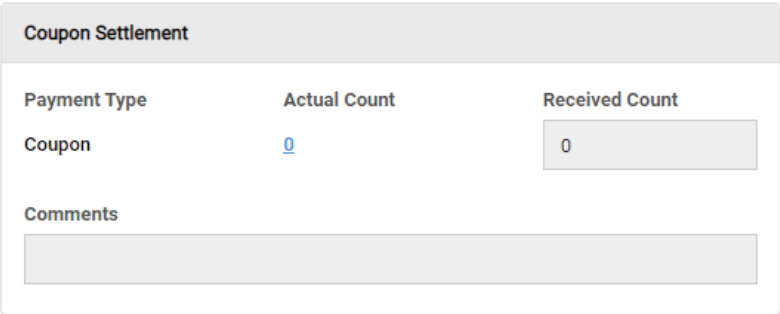
Coupon Settlement:

In Coupon Settlement section, user can enter the number of coupons that are being returned by the FSR.

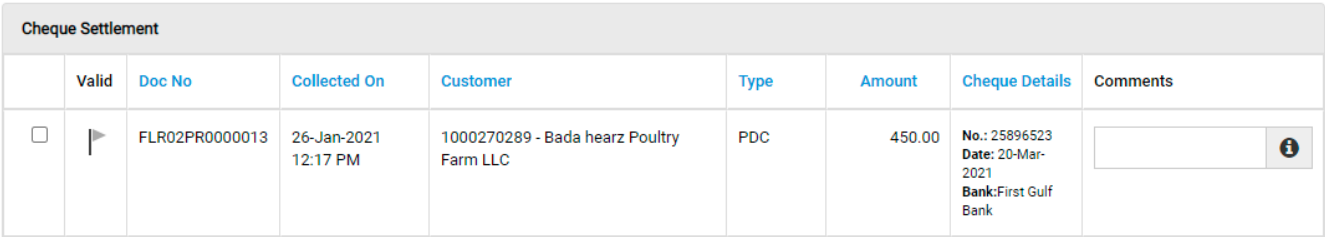


Enter the number of coupons in Received Count field.

Click on Actual count to view the detailed breakdown of number of coupons to be collected.

Cheque Settlement:

In Cheque settlement section, all the cheques that are collected by FSR will be listed. Click on the checkbox against the collection document which are being collected during the settlement. If any cheque is not being collected, a comment is to be provided against it.



POD Settlement:

In POD settlement section, user will be marking the documents against which POD has been received physically.

All the documents are grouped by the type of transaction. Click on the check box against the documents which are received.

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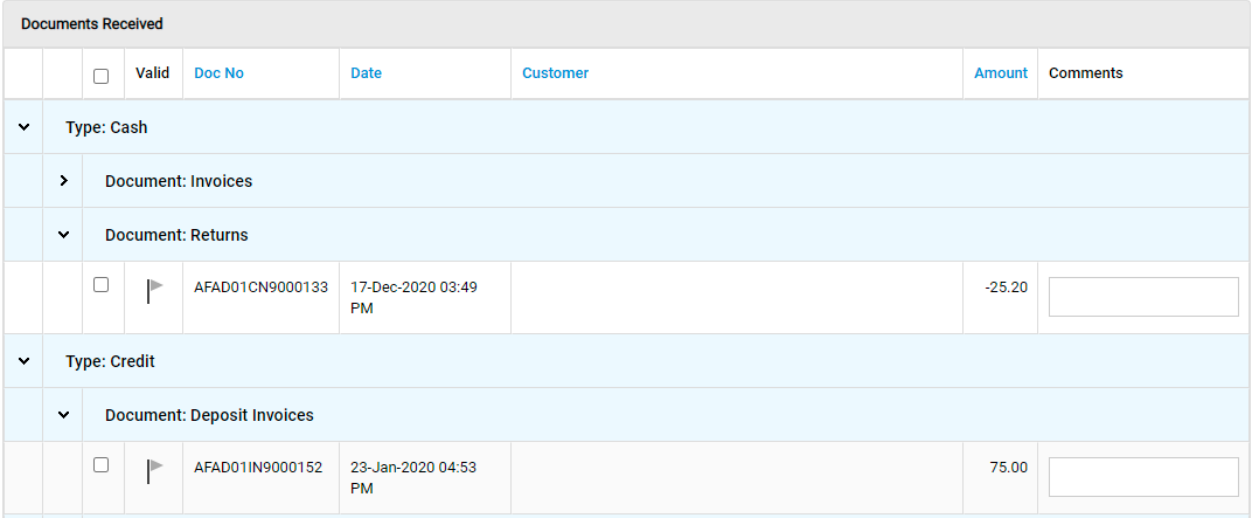
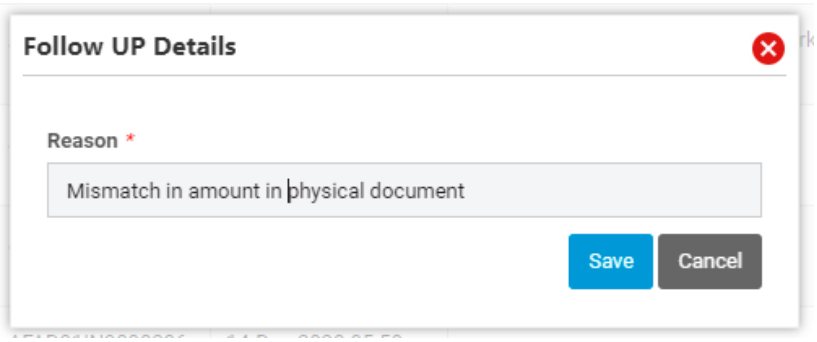


Marking a transaction as Invalid/Follow up:

In case if a follow up is required against a transaction, user can make use of the flags that are provided against each document.

Click on button against the document to note a follow up against a document. Once it is clicked on, a pop up to enter the reason will be displayed. Enter the reason and click on Save.



Once a document is marked for follow up, the button will be replaced by

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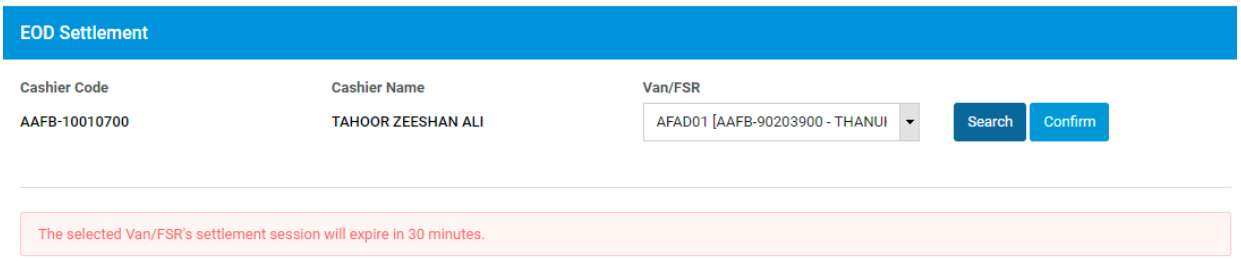
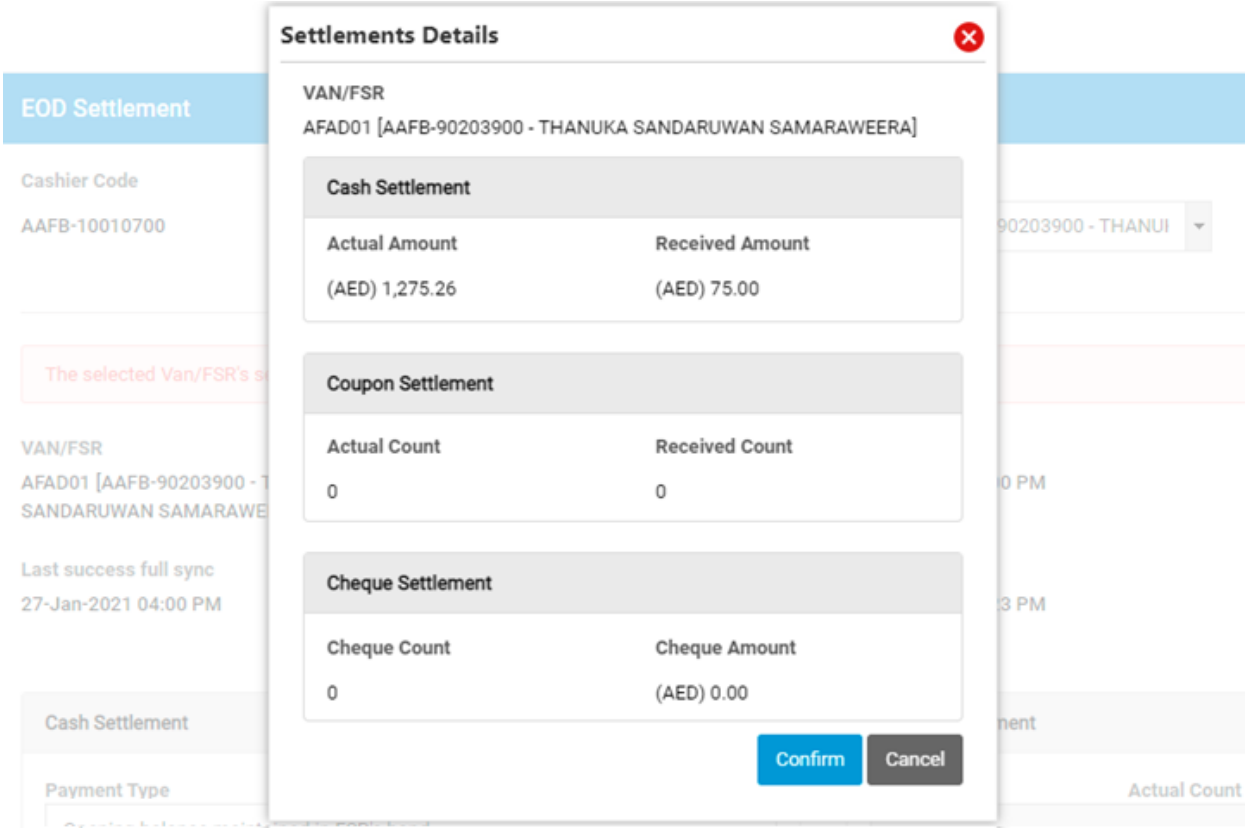
Saving a settlement:

Once all the information related to the settlement is captured, click on Confirm button at the top of the screen.



A summary of the settlement that is going to be confirmed will be displayed. User can review this information. If there is any correction to be done, user can click on Cancel to go back and do the necessary correction.

To confirm the settlement, click on Confirm button.



An acknowledgment will be displayed. User can either choose to print the document or proceed without printing.

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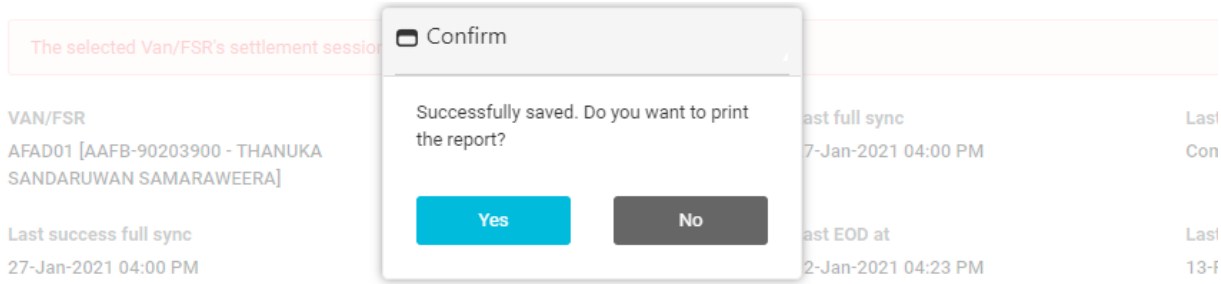


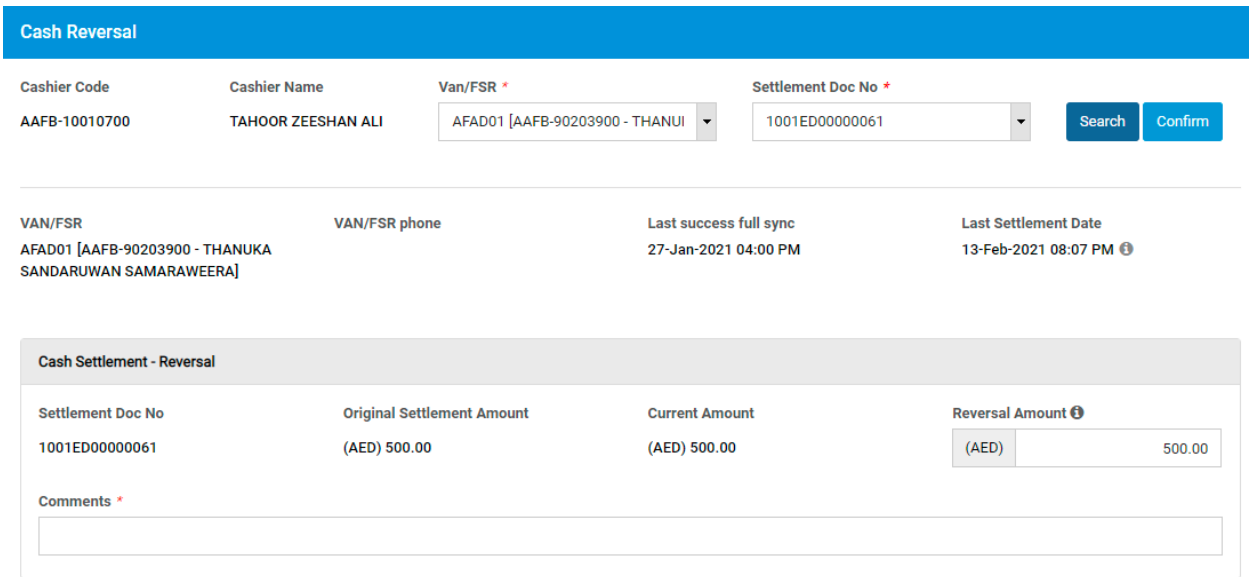
12.13 Cash Adjustments

In case if any mistake in cash settlement was done during the EOD settlement, such errors can be corrected using Cash Adjustments screen.

Select a FSR and a Settlement document number from the dropdown in which there is an error.

Click on Search button.

The FSR information and Last sync and settlement information will be displayed.



Original Settlement Amount is the amount that is entered while confirming the initial settlement.

Current amount is the amount that is recorded against the settlement document after considering all the reversals that were made against that particular settlement document.

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User needs to enter the difference in amount that is collected from FSR in the Reversal Amount Field.

For example, if the user has entered 1250 during a cash settlement, whereas he/she has collected only 1200 in cash, amount 50 is to be entered in Reversal Amount field.

Comments during a cash reversal is mandatory.

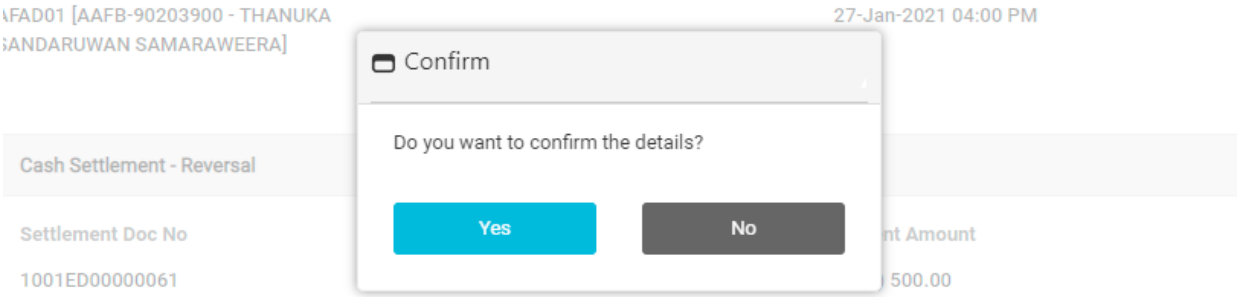
Reversal amount can only be lesser than or equal to Current Amount.

In case if the user has entered less amount during a settlement, and has actually collected more amount in terms of cash, the user will have to create a new settlement document to enter the excess amount.

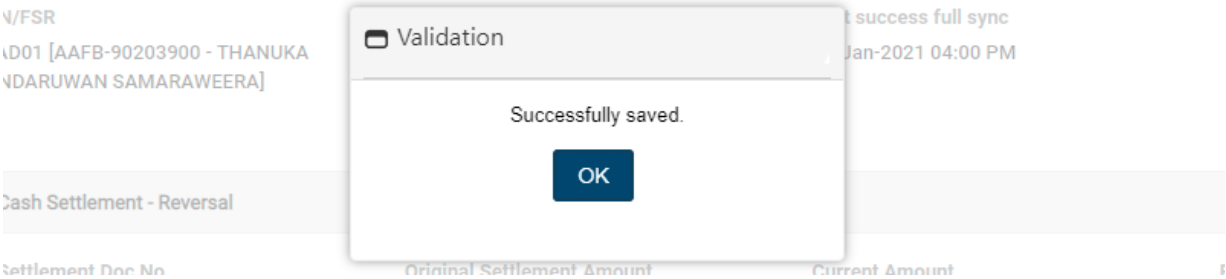
After entering the Reversal Amount and the comments, click on Confirm button at the top of the screen.

A confirmation will be asked. Click on No in case if user needs to go back and do corrections.

Click on Yes to confirm the reversal.



A confirmation message will be displayed.



The reversed amount will start appearing in Current Amount section.

A log of all the reversals that were made against the settlement document will be displayed at the bottom.

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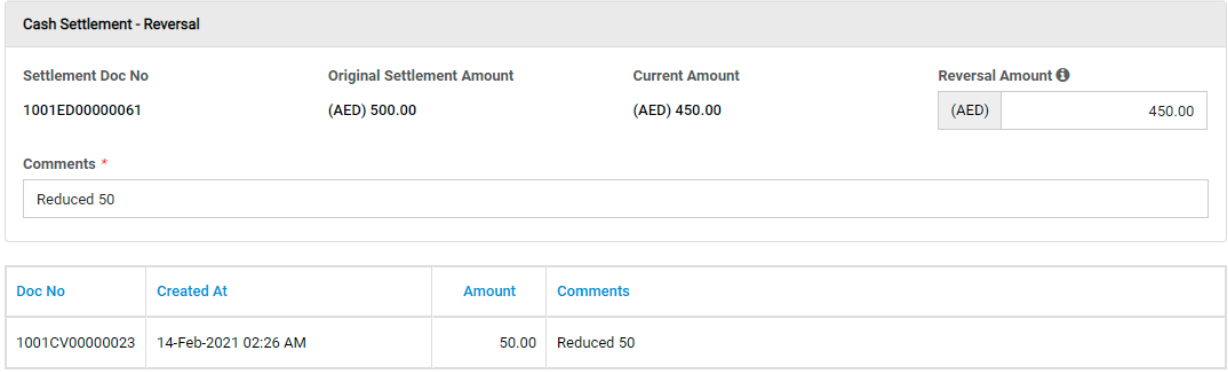
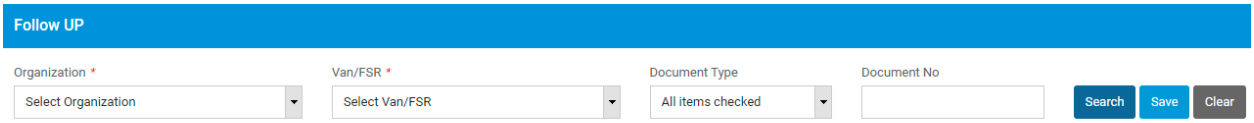


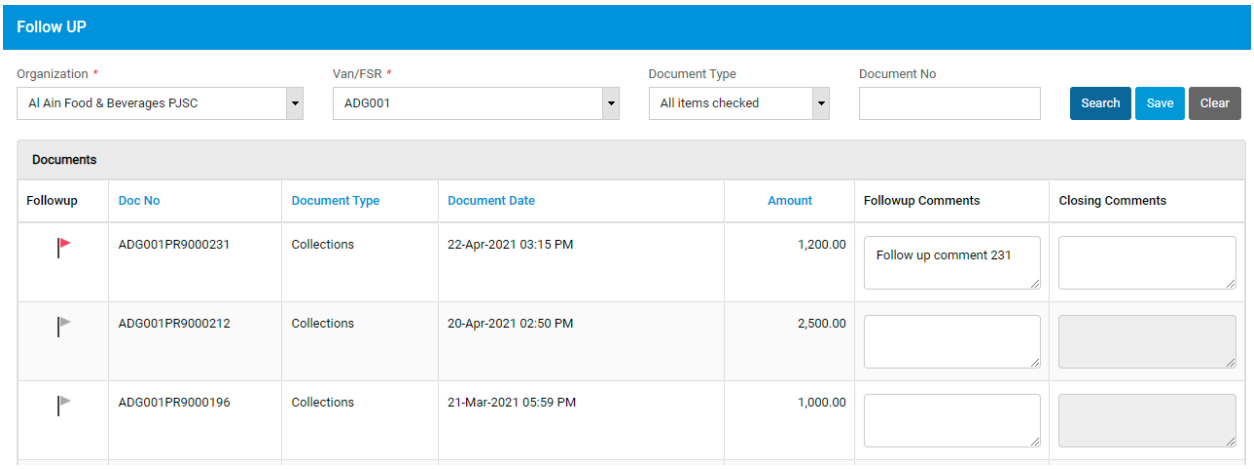
12.14 Follow Up

Follow up screen can be used to record that a follow up is required on a transaction. You can also provide comments while flagging a transaction as follow up, and while closing the follow up activity.



Select an organization and an FSR. You can filter by document type or search by document number. Click on Search button.

The flagged documents will be highlighted and the comments will be displayed.



To flag a document, click on the flag button and provide the comments.

Click on Save button to save it.

To close a follow up, enter the closing comments and click on Save button.

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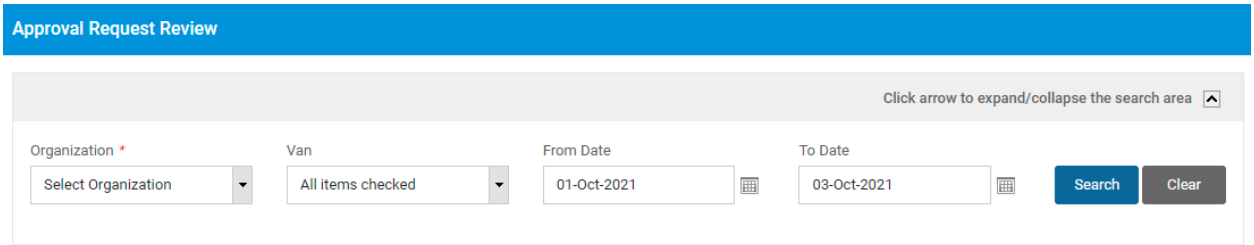
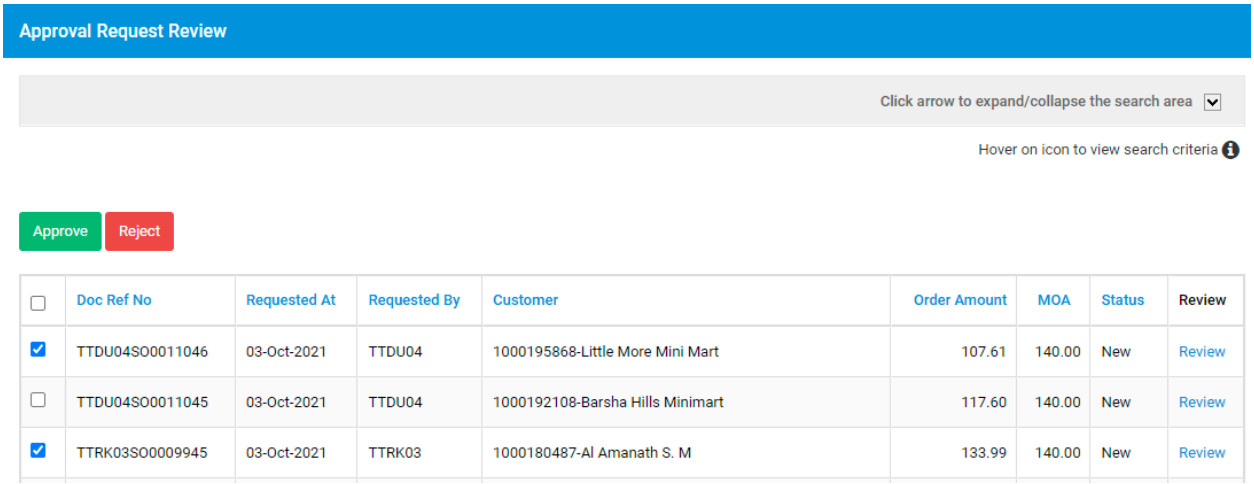
12.15 Approval Request Review

In Approval request review screen, you will be able to see all the transactions that are awaiting approval because of Minimum Order Amount restriction.



Select an organization and select van or date filters if required. Click on Search button.

All the transaction awaiting approval will be displayed.



	Doc Ref No	Requested At	Requested By	Customer	Order Amount	MOA	Status	Review
☑	TTDU04SO0011046	03-Oct-2021	TTDU04	1000195868-Little More Mini Mart	107.61	140.00	New	Review
☐	TTDU04SO0011045	03-Oct-2021	TTDU04	1000192108-Barsha Hills Minimart	117.60	140.00	New	Review
☑	TTRK03SO0009945	03-Oct-2021	TTRK03	1000180487-Al Amanath S. M	133.99	140.00	New	Review

Select the transactions that you wish to approve or reject.

Click on Approve button to approve the selected transactions, or click on Reject button to reject the selected transactions.

To view more detailed information about a transaction, you can click on Review button.

13. Incentives

In the Incentives section, you will be able to define a target for receiving incentives, define pay out slabs, specify the weightage, generate incentives statement, and manage pay outs.

13.1 Manage Incentives

In this screen, you can define the incentive weightage and incentive payout slabs.

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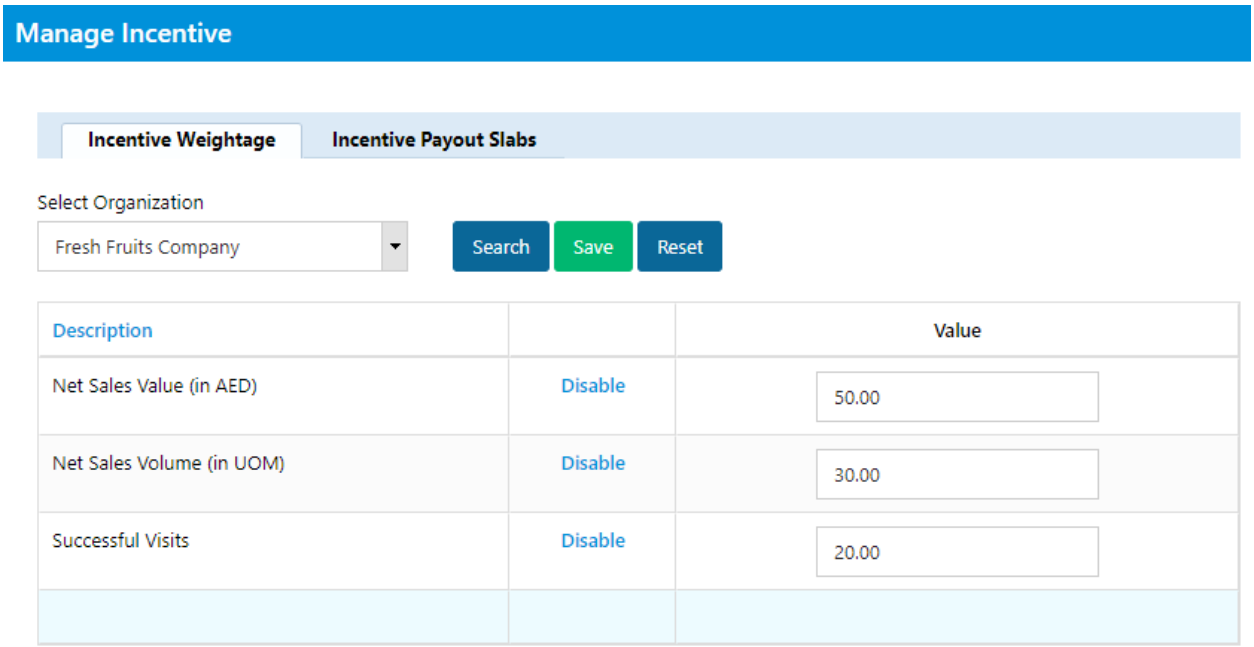
Incentive Weightage:

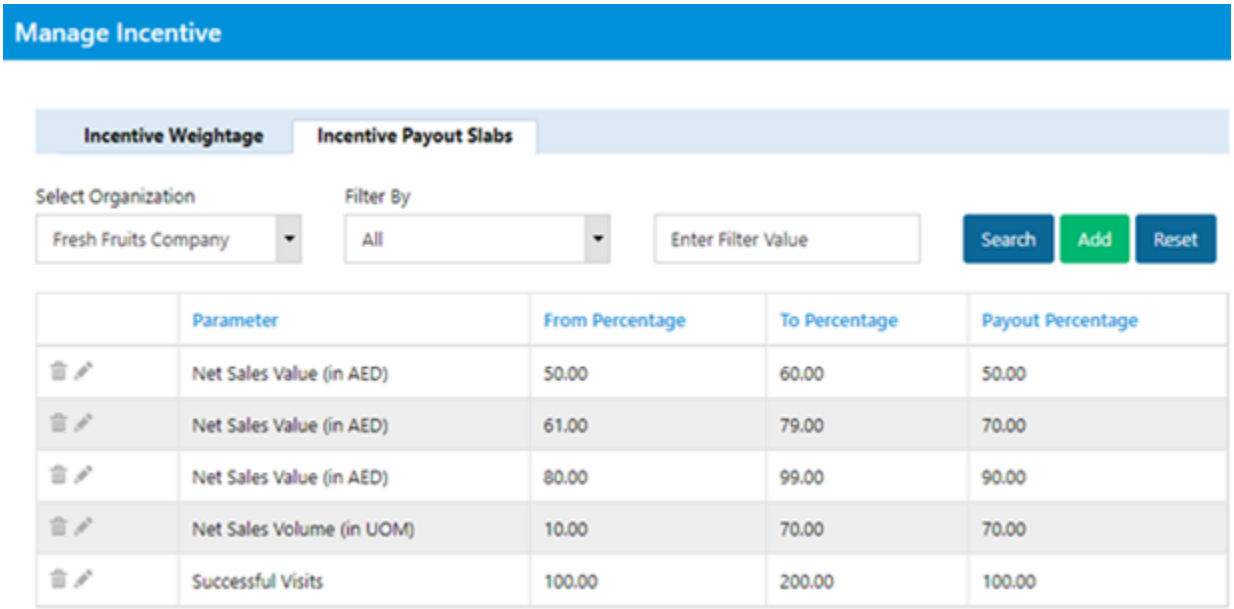
In Incentive weightage tab, you can specify the weightage for the parameters: Net sales value, Net sales volume, and Successful visits.



Click on Save button to save the weightages.

Incentive Payout Slabs:

In Incentive Payout Slabs tab, all the existing payout slabs that are defined will be listed.



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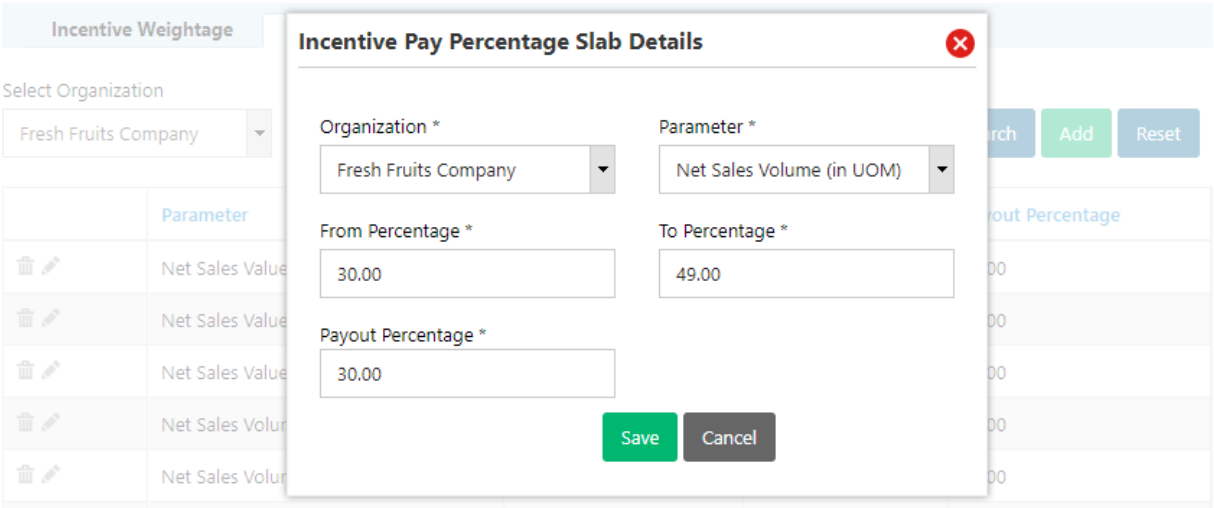
To add a new payout slab, click on Add button. A pop up will be displayed.

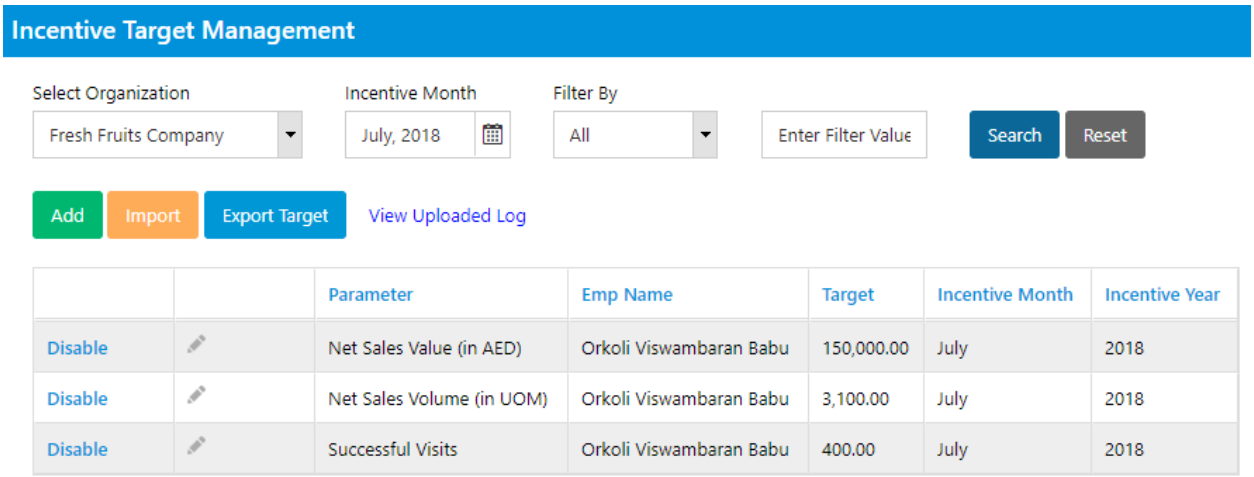


Select the Parameter, enter From and To percentage, and enter payout percentage. Click on Save to save the changes. Click on Cancel to discard to the changes.

Click on button to edit payout percentage slab and button to delete one.

13.2 Manage Target

In this screen, you can view and define the monthly targets for Sales reps. To see the defined targets, select Incentive month, provide filter conditions if needed, and then click on Search button.



To edit a target definition, click on button.

To define a target, click on Add button.

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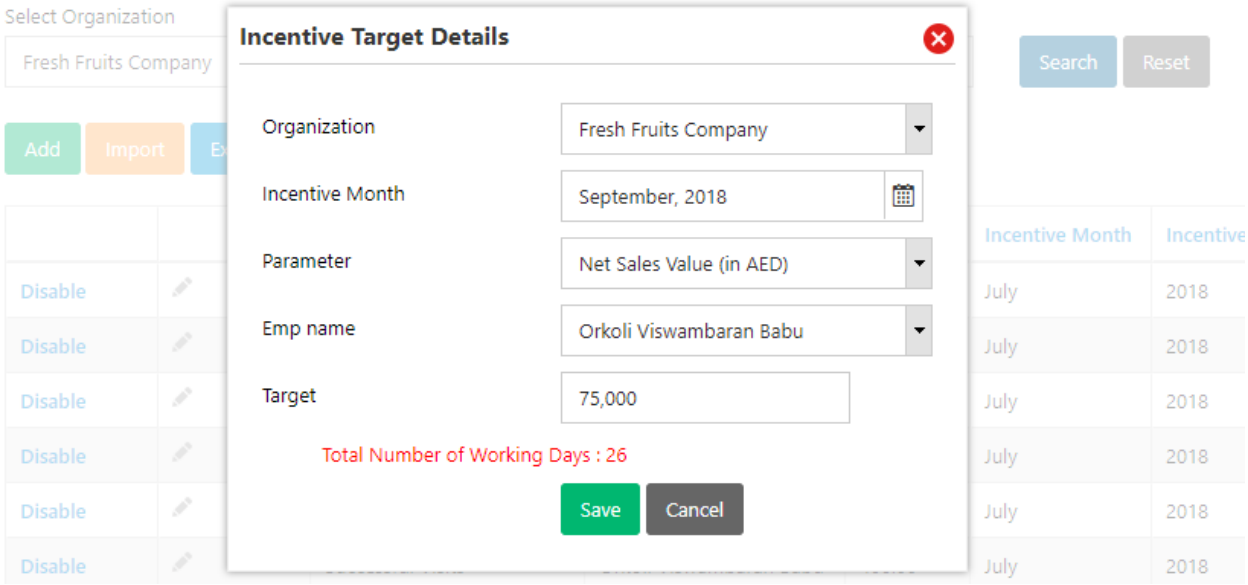
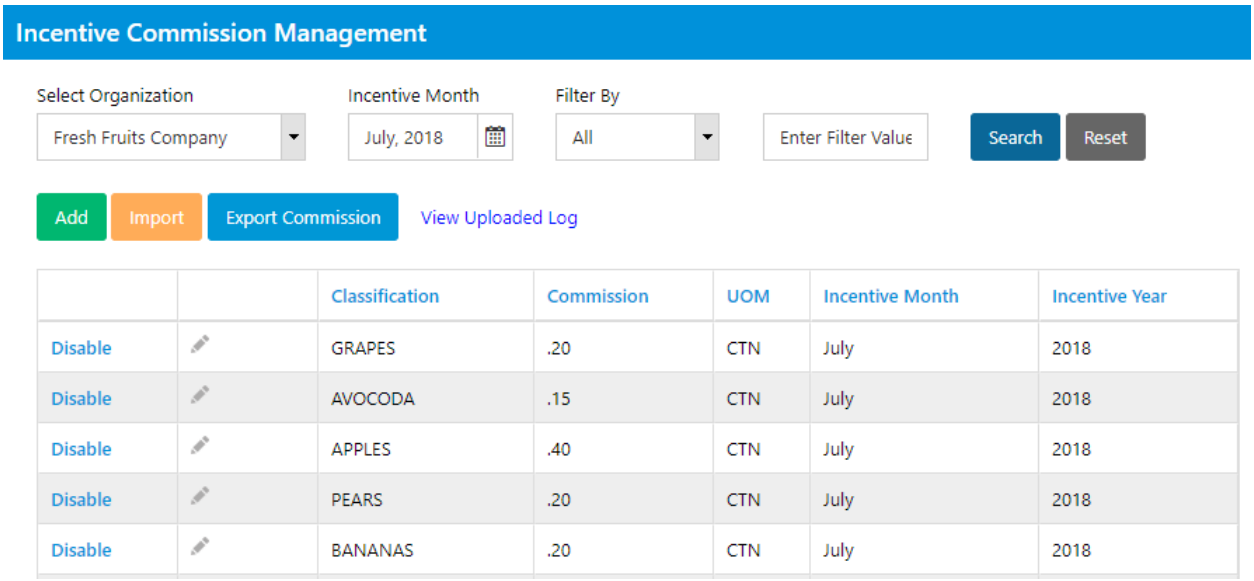


Select the month for which target is being defined. Select the parameter for which target is being set. Select an employee. Enter the target for parameter in the Target field. Then click on Save button.

Continue the process for defining targets for other parameters.

13.3 Manage Commission

This screen allows you to view define a commission against product classification. Select an organization and a month, then click on Search button to view the commission definition for product classifications.



To edit a commission definition, click on button.

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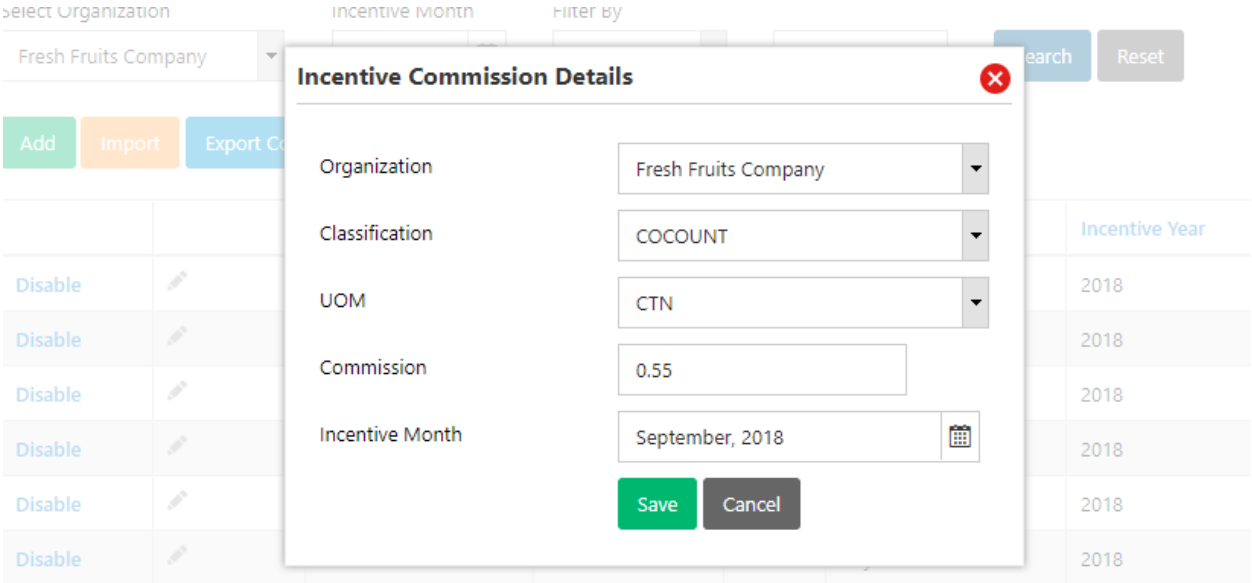
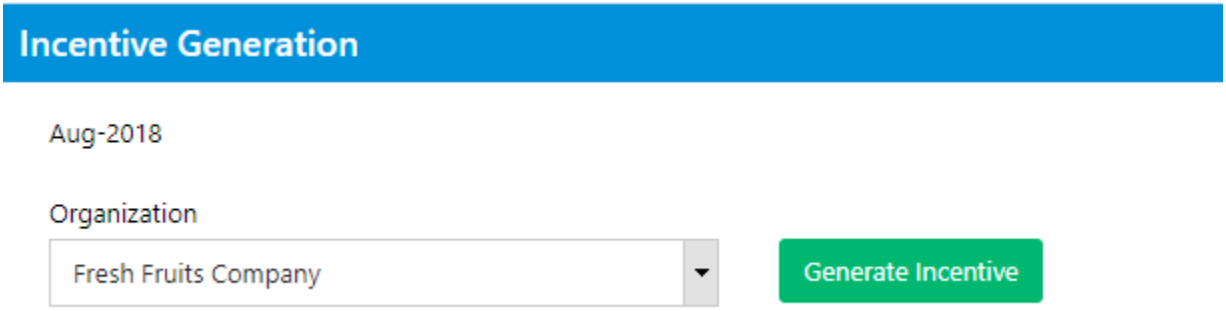
Click on Add button to define a commission for a product classification.



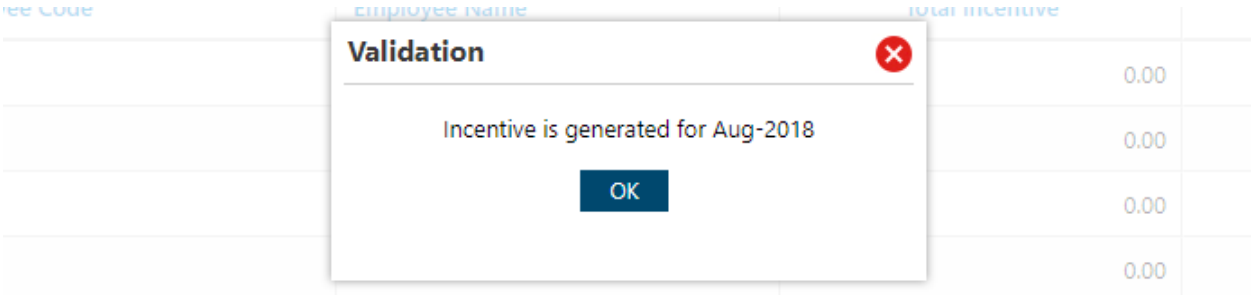
Select Product classification from the dropdown. Select a UOM. Enter the commission rate per UOM defined. Choose the month. Click on Save button to save the commission definition for this product classification. Continue the process for other classifications.

13.4 Generate Incentive

You can generate incentives for the previous month using this screen. To generate incentives, click on Generate Incentive button.



You will receive a confirmation after the incentives are generated.



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Incentive Generation

Aug-2018

Organization

Fresh Fruits Company

Generate Incentive

Employee Code	Employee Name	Total Incentive	Eligibile Incentive(EOM)
1121	Rakesh	0.00	0.00
1124	Hameed	0.00	0.00
1126	kamal	0.00	0.00
1134	Shuhaib	0.00	0.00
1254	Padam Bahadur	0.00	0.00
1436	Faris	0.00	0.00
1683	Aziz	0.00	0.00
1693	Zuhail	0.00	0.00
171	Manoj	0.00	0.00
34	Pradap c	0.00	0.00

1 2

12 items in 2 pages

The generated incentives will be displayed.

13.5 Incentive Statement

You can handle incentive payouts in this screen. To view the credited incentives of the sales persons, select employees and click on Search.

Incentive Statement

Organization *

Fresh Fruits Company

Employee

Select Employee

Search Clear

Enter the settling amount against the sales person. After the settling amount is entered, click on Pay button.

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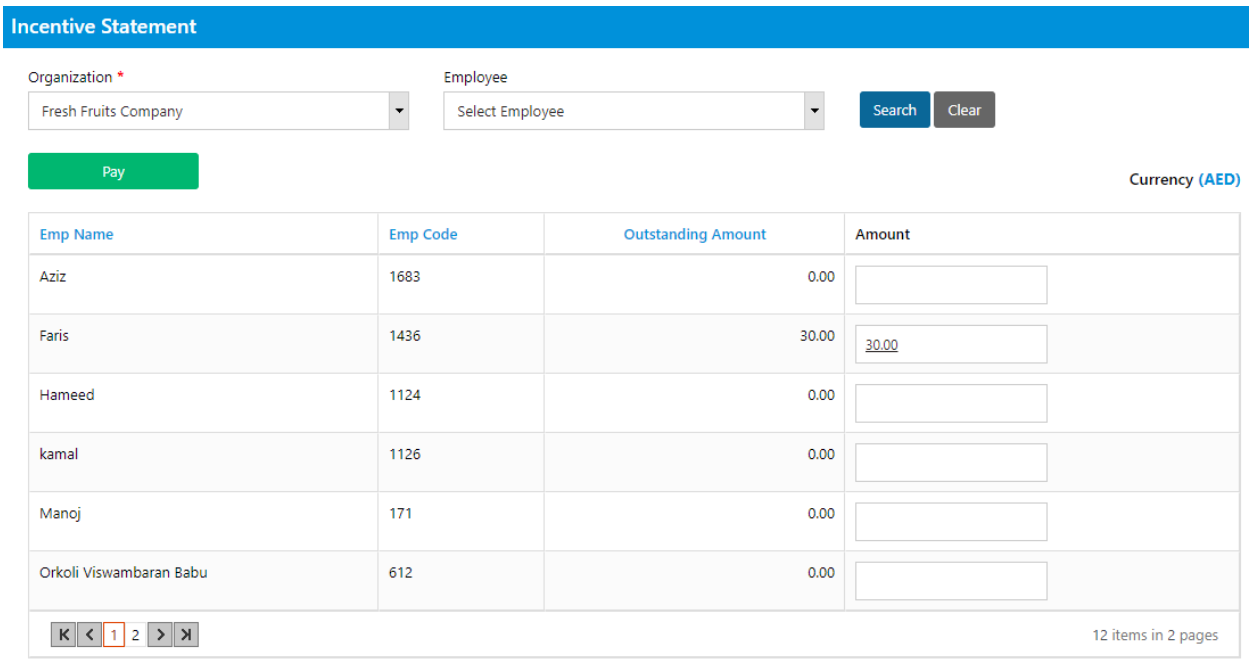
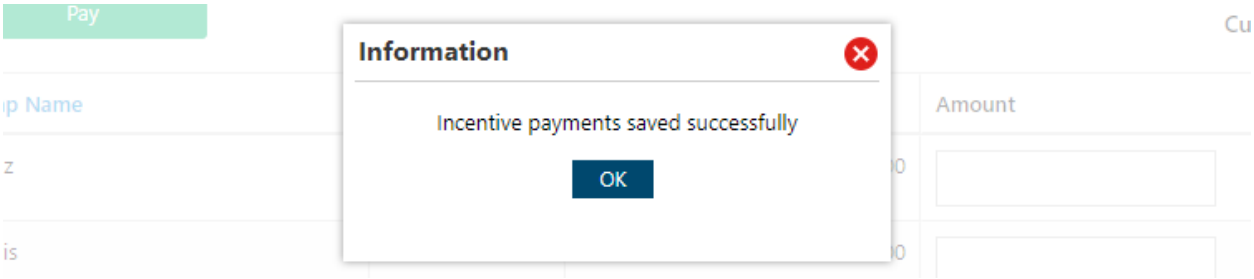


You will receive a confirmation after the settlement is saved.



14. Survey

There are 4 types of surveys that can be configured in SalesWorx. They are:

1. Customer Survey
2. Market Survey
3. Merchandising Survey
4. Audit Survey

Customer Survey

Customer surveys are intended to capture responses from the customers. For example, if you'd like to take feedback from your customer regarding your delivery team, you can set up a customer survey.

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During a customer visit, this survey will be available in Visit options screen under Customer Survey option. Your sales team can hand over the tablet to the customer and let him/her respond to the questions that you have configured in SalesWorx back office.

One particular survey can only be answered once per customer visit. You can also access customer survey from the menu options.

Market Survey

Market Surveys are intended to capture the responses by sales person. You can use market surveys in situations where in you want your sales person to perform some market research.

During a customer visit, this survey will be available in Visit option screen under Market Survey option.

Market Surveys runs in loops, which means that at the end of survey, sales person will be redirected to the first question again to capture a new set of responses.

Merchandising Survey

Merchandising surveys are intended to meet your merchandising requirements to an extent. You can configure merchandising surveys using various ready to use controls in SalesWorx back office.

During a customer visit, this survey will be available in Visit option screen under Market Visit Survey option.

Market Survey runs in loops as long as the user exits from that survey.

Audit Survey

Audit surveys are intended for supervisors in order to perform auditing activities.

Audit surveys can be accessed from Menu options in tablet application. In order to get access to Audit surveys, one will have to provide the supervisor's user credentials.

14.1 Manage Surveys

Open the screen to view all the surveys that are created.

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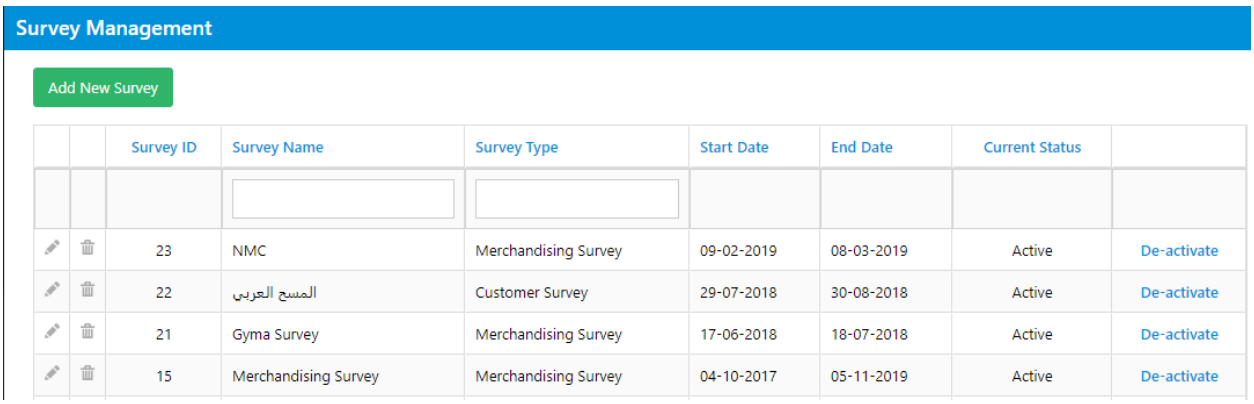
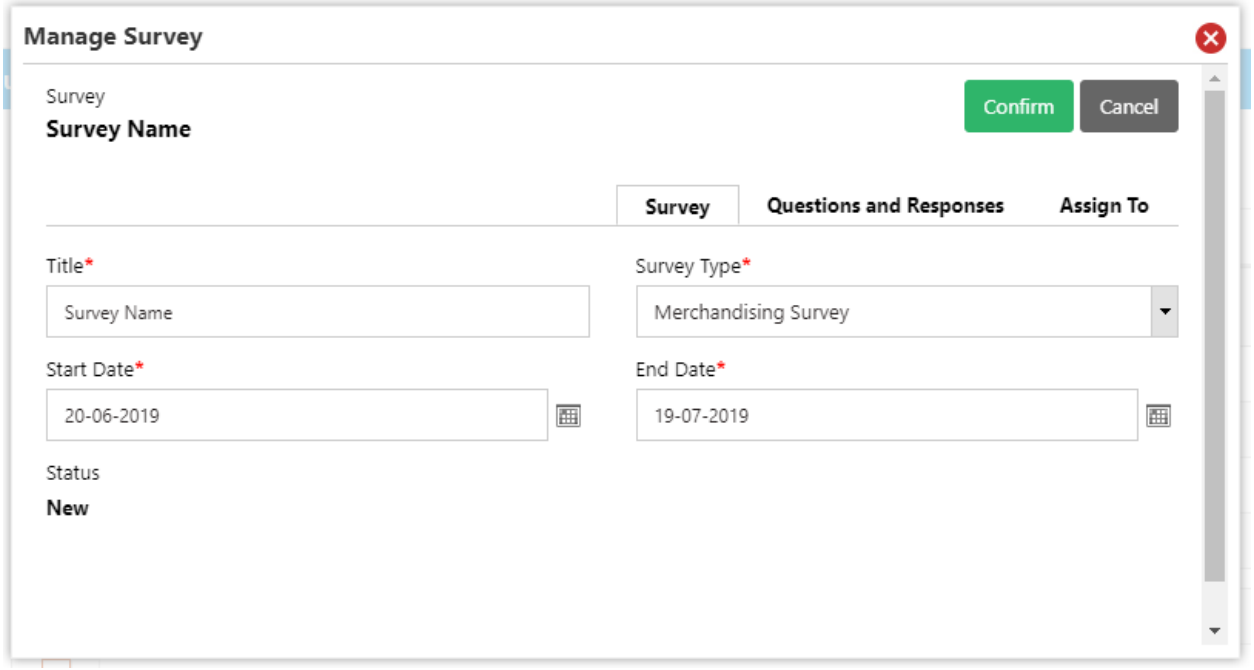


Click on **Add New Survey** button to create a new survey.



Enter a **title/name** for the survey. Mention the **Start Date** and **End Date** of the survey. The survey status will be **New** by default.

From the **Survey Type** drop down, select the type of survey that you wish to create.

After providing all this information, click on '**Questions and Responses**' tab.

After clicking on '**Questions and Responses**' tab, you will see the area wherein you can define the questions and the possible responses against that question.

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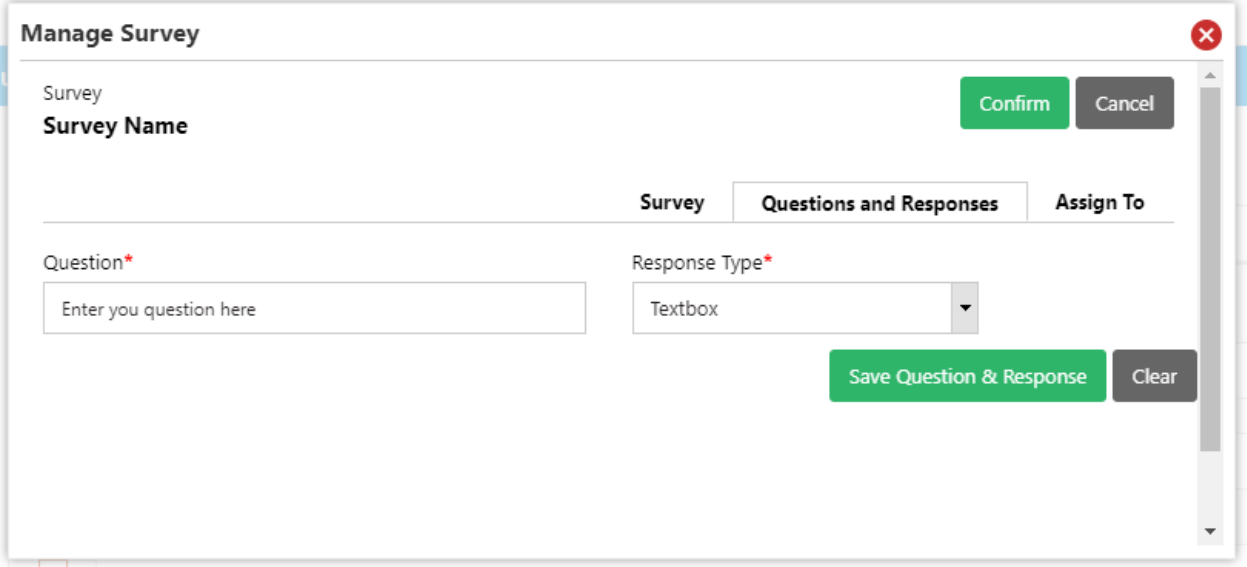

Customer Survey

Enter the **Question** in the text field provided. In **Response Type** drop down, select the response type for this question.

Possible response types for a customer survey are:

- **Textbox**
- **Radio Button**
- **Checkbox**

Please note that only the above response types are to be used for survey type- Customer Survey.

If the response type is Textbox, click on '**Save Question & Response**' button in order to save the question.

The saved question will be listed at bottom of the pop up.

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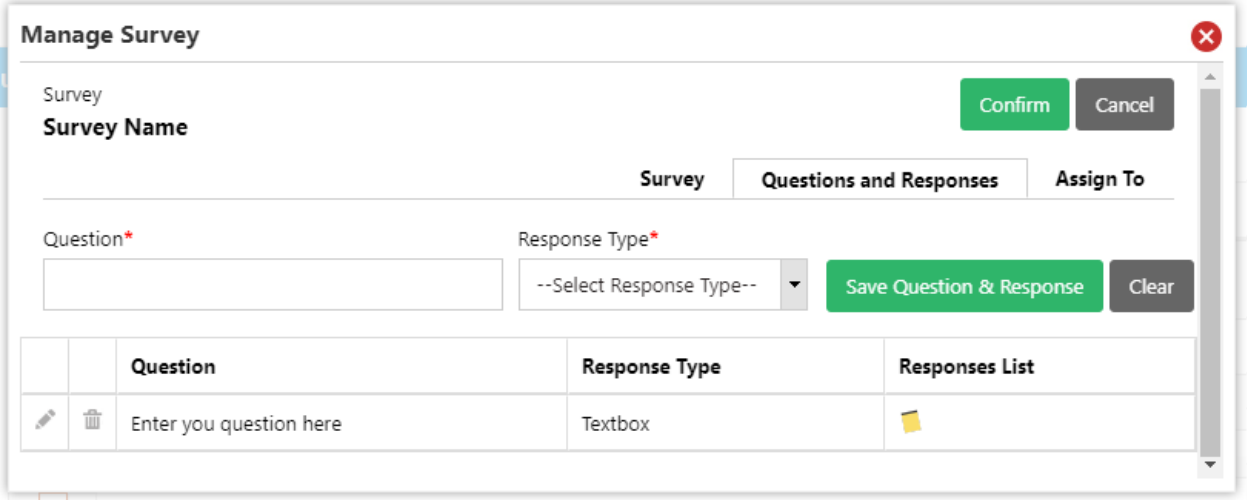
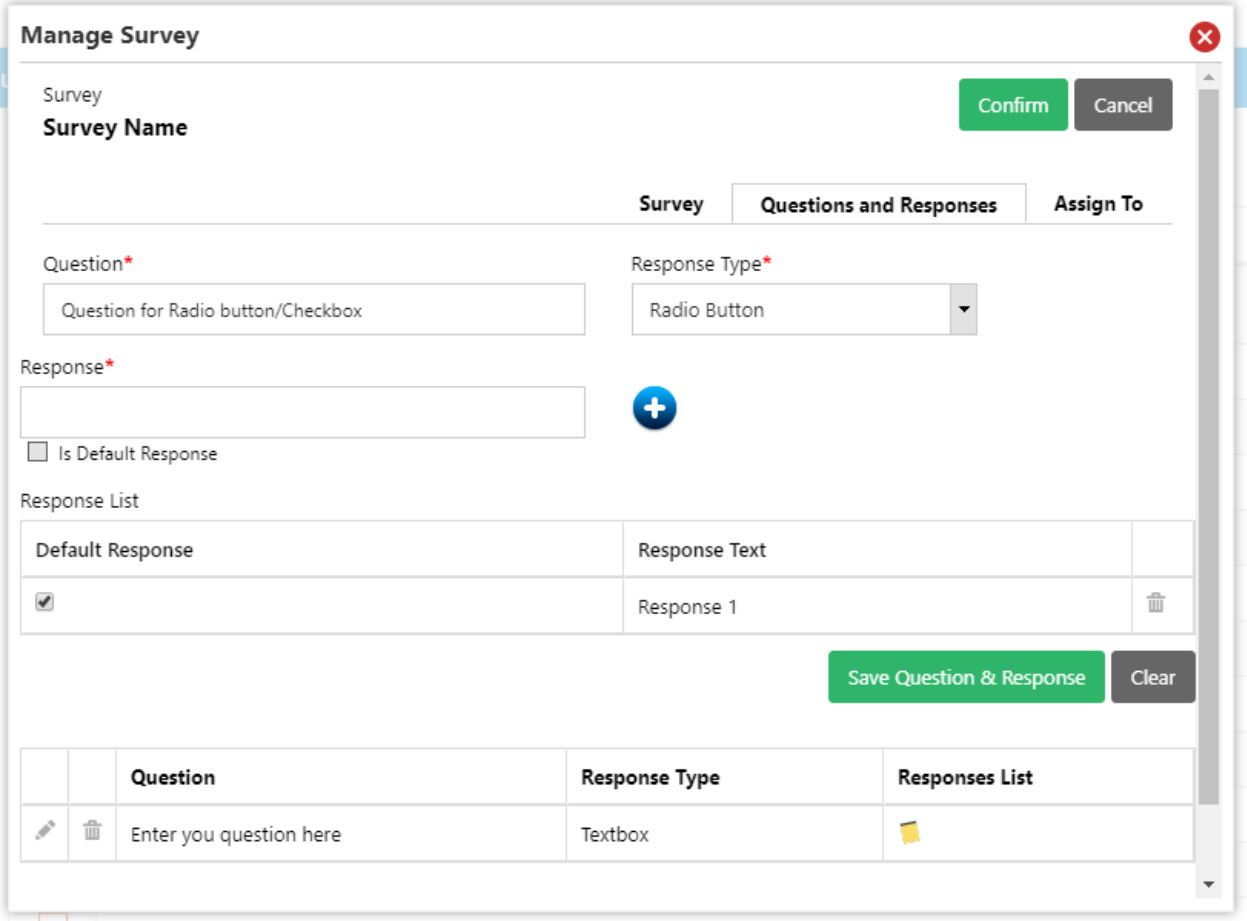


If the response type is **Radio button** or **Checkbox**, you will have to add possible responses so that the user can select one or more options among them.

Enter your first response in **Response** text field. If you want this response to be the default response, enable the check box **Is Default Response.** Then click on button.

The response will be added to Response List.



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Continue the process of adding responses to Response List. You can delete an added response by clicking on button.

After all the responses are added, click on '**Save Question & Response**' button.

Repeat the steps to add more questions to this survey. After all the questions are created, click on **Assign_To** tab.

Market Survey

Enter the **Question** in the text field provided. In **Response Type** drop down, select the response type for this question.

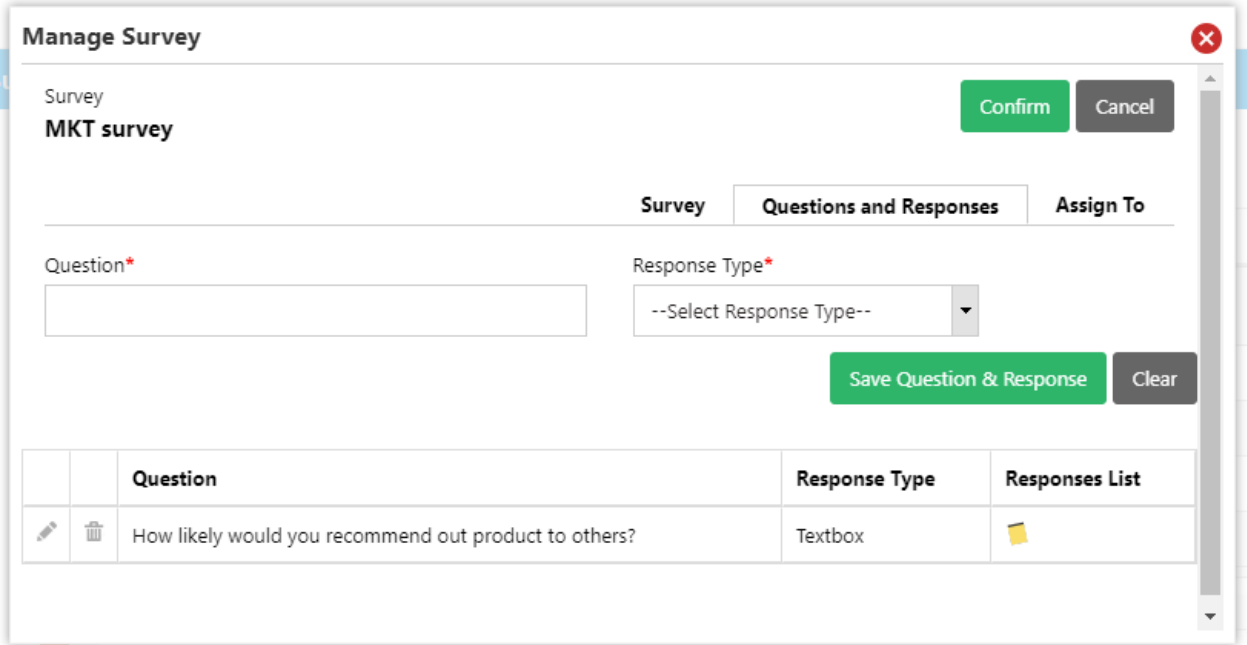
Possible response types for a market survey are:

- **Textbox**
- **Radio Button**
- **Checkbox**
- **Image**

Please note that only the above response types are to be used for survey type- Market Survey.

If the response type is Textbox or Image, click on '**Save Question & Response**' button in order to save the question.

The saved question will be listed at bottom of the pop up.



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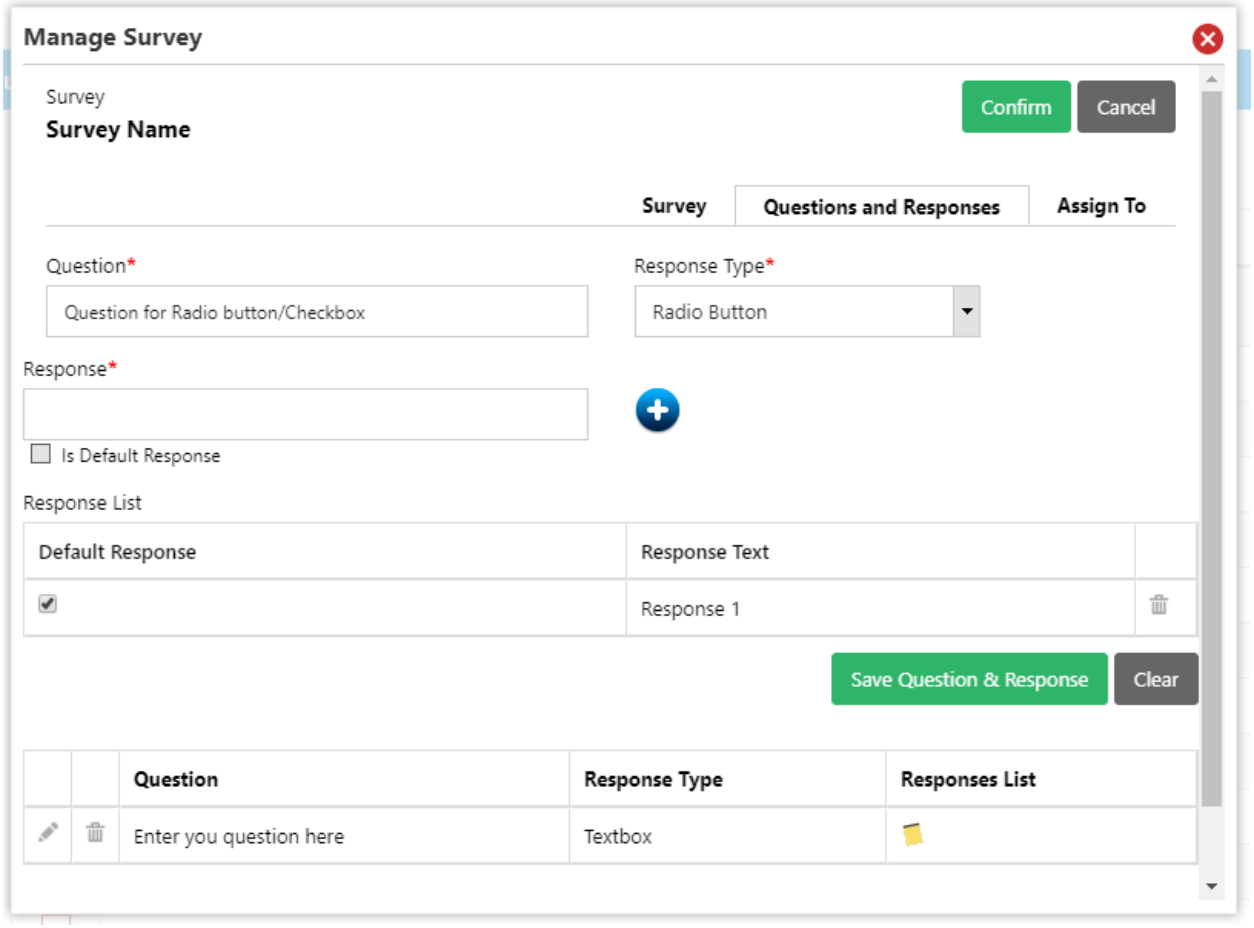
If the response type is **Radio button** or **Checkbox**, you will have to add possible responses so that the user can select one or more options among them.

Enter your first response in **Response** text field. If you want this response to be the default response, enable the check box **Is Default Response.** Then click on button.

The response will be added to Response List.



Continue the process of adding responses to Response List. You can delete an added response by clicking on button.

After all the responses are added, click on '**Save Question & Response**' button.

Repeat the steps to add more questions to this survey. After all the questions are created, click on **Assign_To** tab.

Merchandising Survey

Unlike other surveys, there are certain rules that are to be followed while creating a merchandising survey.

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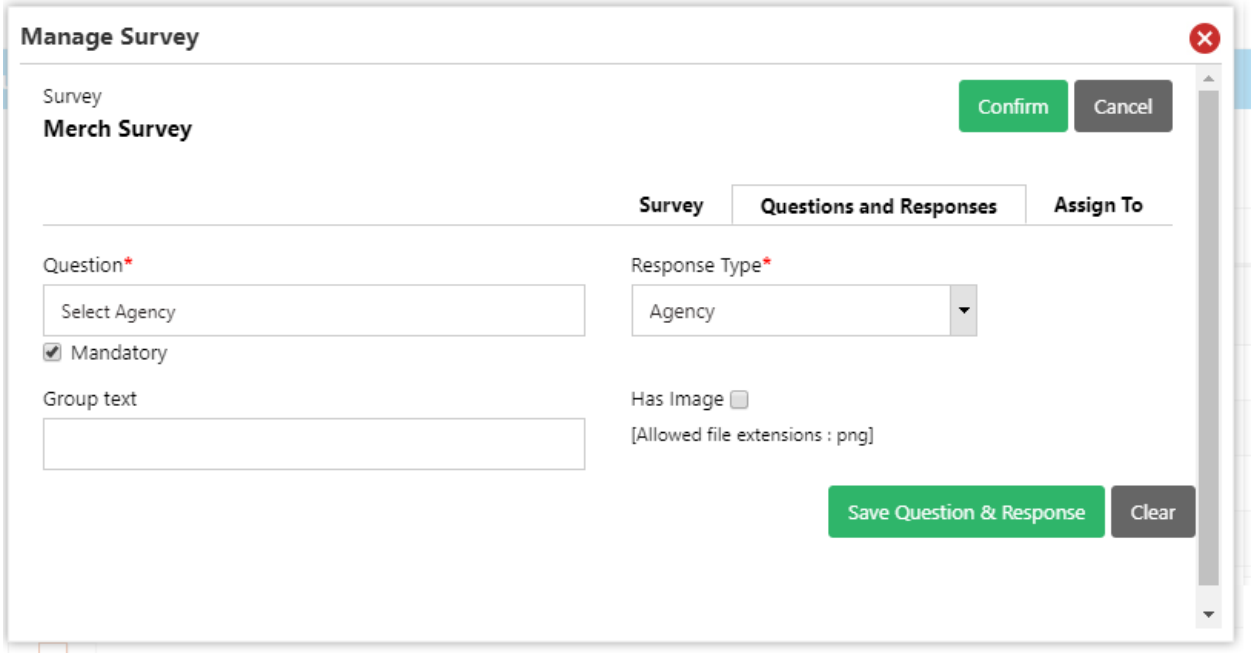
The first question should be marked as mandatory by enabling 'Mandatory' checkbox.

The response type of the first question should be one among the below:

- Agency
- Brand
- Product

Enter the **Question** in the text field provided. In **Response Type** drop down, select the response type for this question.



After the first question and response type is saved, you can go ahead and configure other survey questions.

Possible response types for a merchandising survey are:

- **Textbox**
- **Radio Button**
- **Checkbox**
- **Image**
- **Date**
- **Date Range**
- **Currency**
- **Rating**
- **Product**
- **Agency**
- **Brand**
- **Survey Images**

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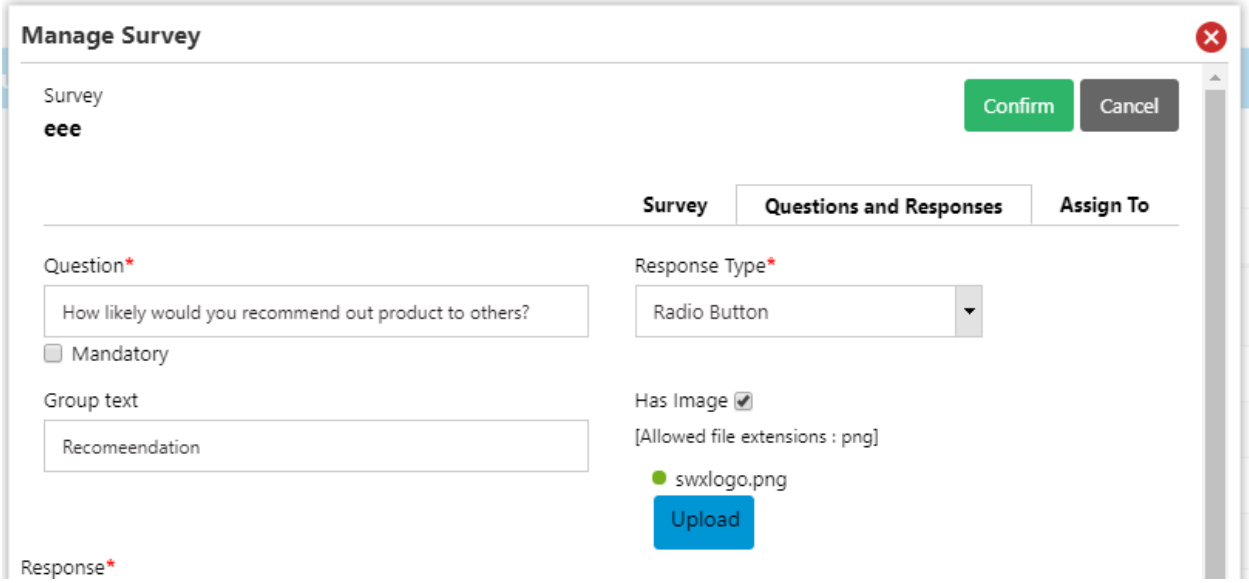
- **Dropdown**
- **Brandshare**
- **Numeric Textbox**

In merchandising survey, you have the option to group a set of questions together. This can be done by providing a **Group Text**.

You can also add a PNG image against a question. In order to do this, you have to enable **Has Image** checkbox. Then add an image by clicking on Upload button.



Steps for creating questions are same as other survey types.

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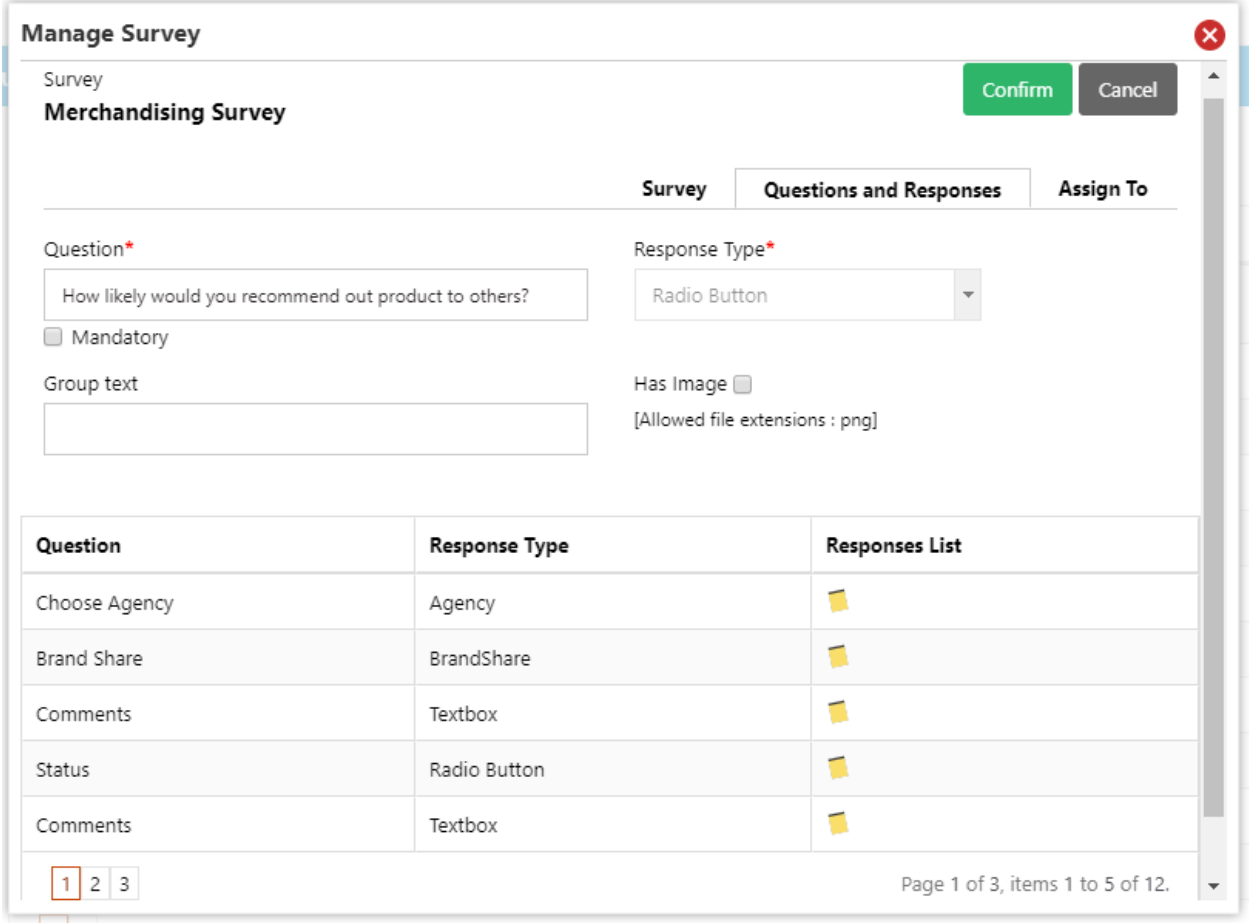

After all the questions are created, click on **Assign_To** tab.

Audit Survey

Enter the **Question** in the text field provided. In **Response Type** drop down, select the response type for this question.

Possible response types for audit survey are:

- **Textbox**
- **Radio Button**
- **Checkbox**

Procedure for creating questions and responses are same as other survey types.

After all the questions are created, click on **Assign_To** tab.

Assigning Survey to FSRs

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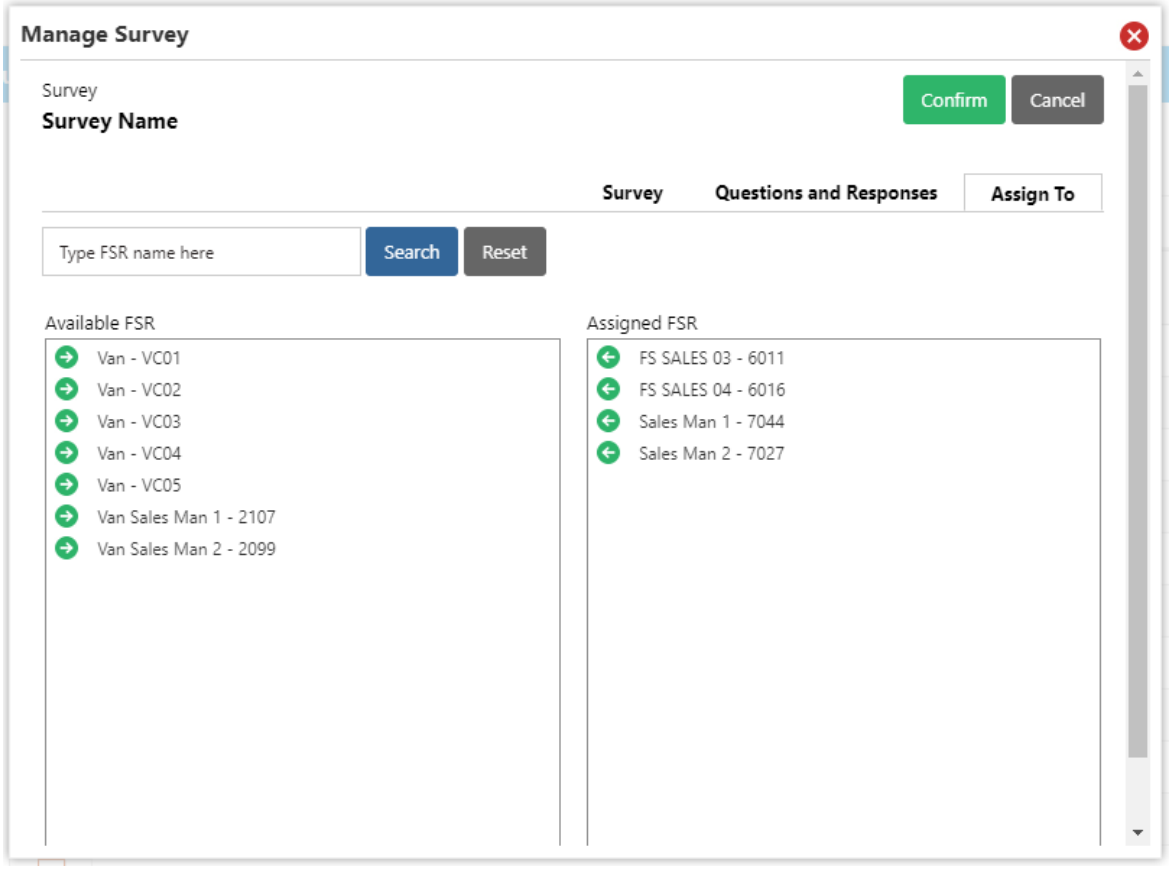
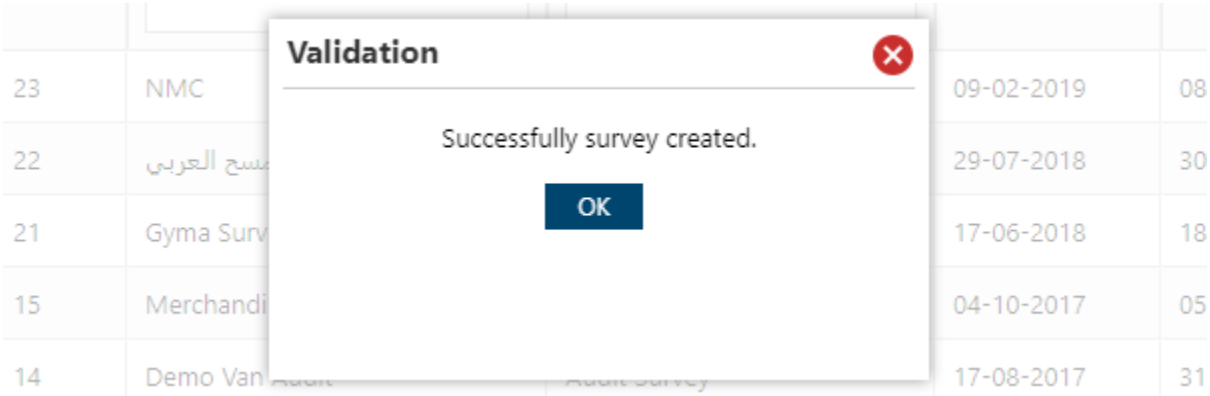
You will be assigning this survey to the FSRs in this tab.



To assign an FSR to this survey, click on button in Available FSR list. In order to remove an FSR from the survey assignment, click on button in Assigned FSR list.

After assigning the FSRs to this survey, click on **Confirm** button.



Activating/Deactivating the Survey

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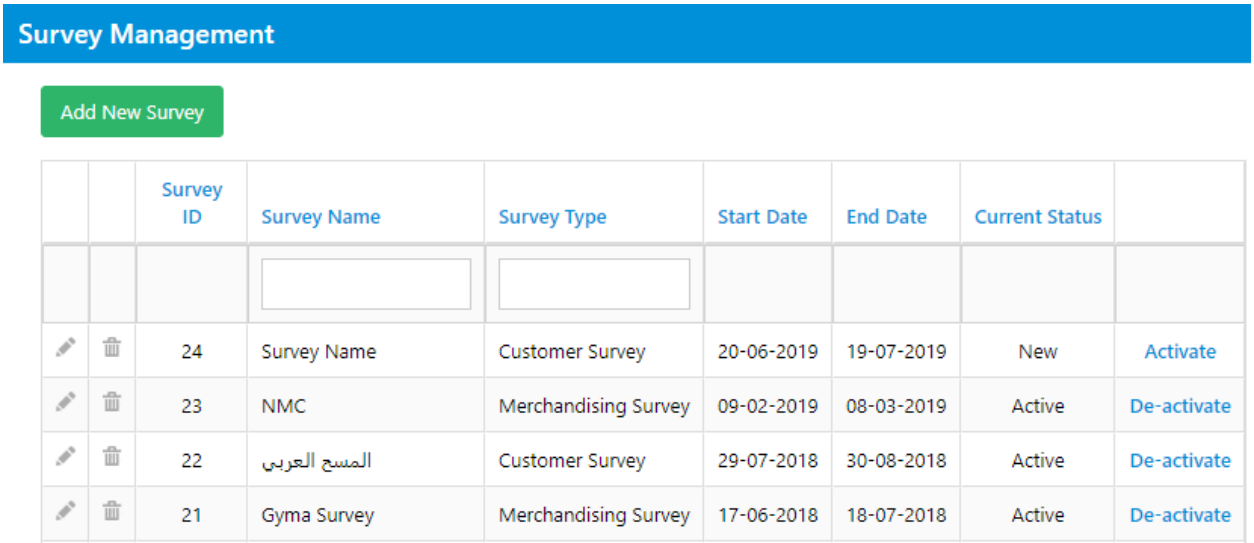
After a survey has been created, this needs to be activated so that it will be available for the users. In order to activate a survey, click on **Activate** button in **Manage Survey** screen.



		Survey ID	Survey Name	Survey Type	Start Date	End Date	Current Status	
		24	Survey Name	Customer Survey	20-06-2019	19-07-2019	New	Activate
		23	NMC	Merchandising Survey	09-02-2019	08-03-2019	Active	De-activate
		22	المسح العربي	Customer Survey	29-07-2018	30-08-2018	Active	De-activate
		21	Gyma Survey	Merchandising Survey	17-06-2018	18-07-2018	Active	De-activate

Click on **OK** to confirm.

You can click on **De-activate** button in order to deactivate an active survey.

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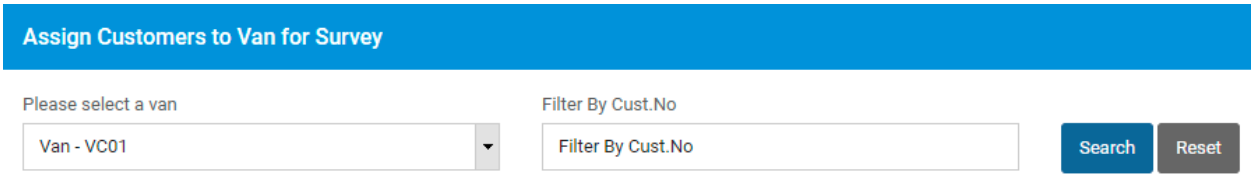
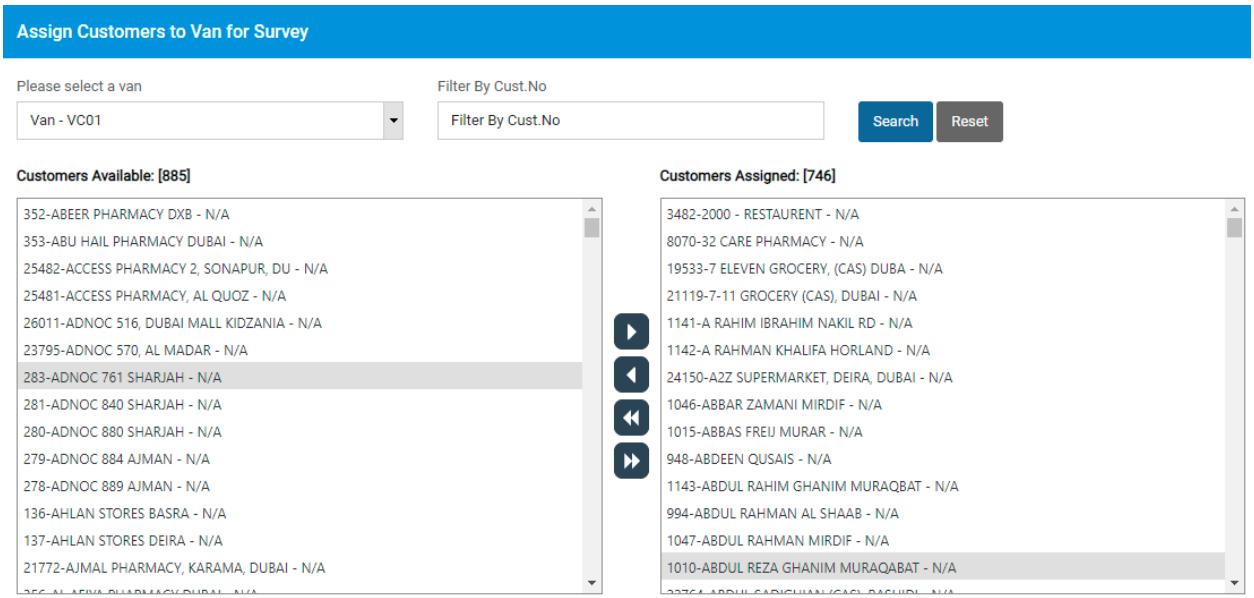
14.2 Survey Assignment

Using Survey Assignment screen, you will be able to assign customers which are eligible for answering surveys.



Select an FSR and click on Search button.



The customers available and the customers assigned will be populated.

In order to assign customers to the surveys, select the customer in Available Customers section, click on button.

To assign all the customers to surveys, click on button.

In order to remove a customer from surveys, select the customer from Assigned list, click on button.

To remove all the customers, click on button.

14.3 Modify Cash Van Audit Survey

This screen can be used to modify the cash van audit survey information that was captured earlier.

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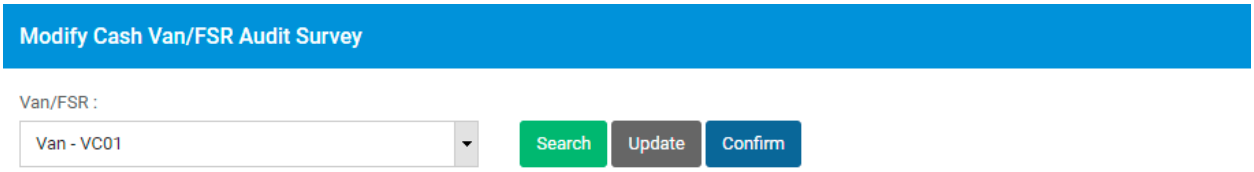
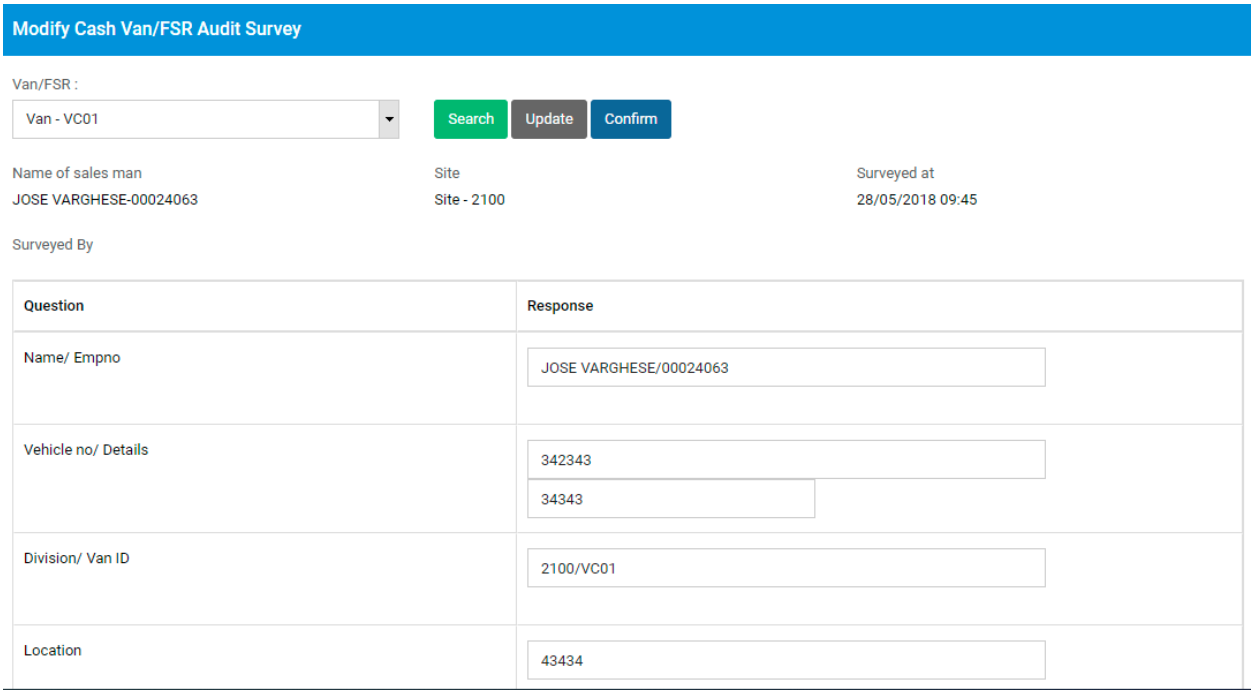


Select the FSR from dropdown and click on Search button.

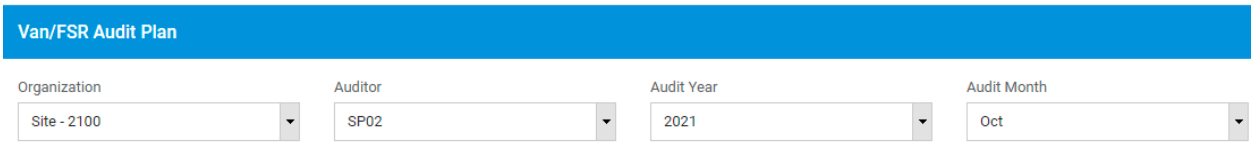
Most recent survey information will be populated.



Modify the required information and click on Confirm button.

14.4 Van Audit Plan

Van Audit Plan screen can be used to create an audit plan for auditors for a month.



Select Organization, Auditor, Year and Month.

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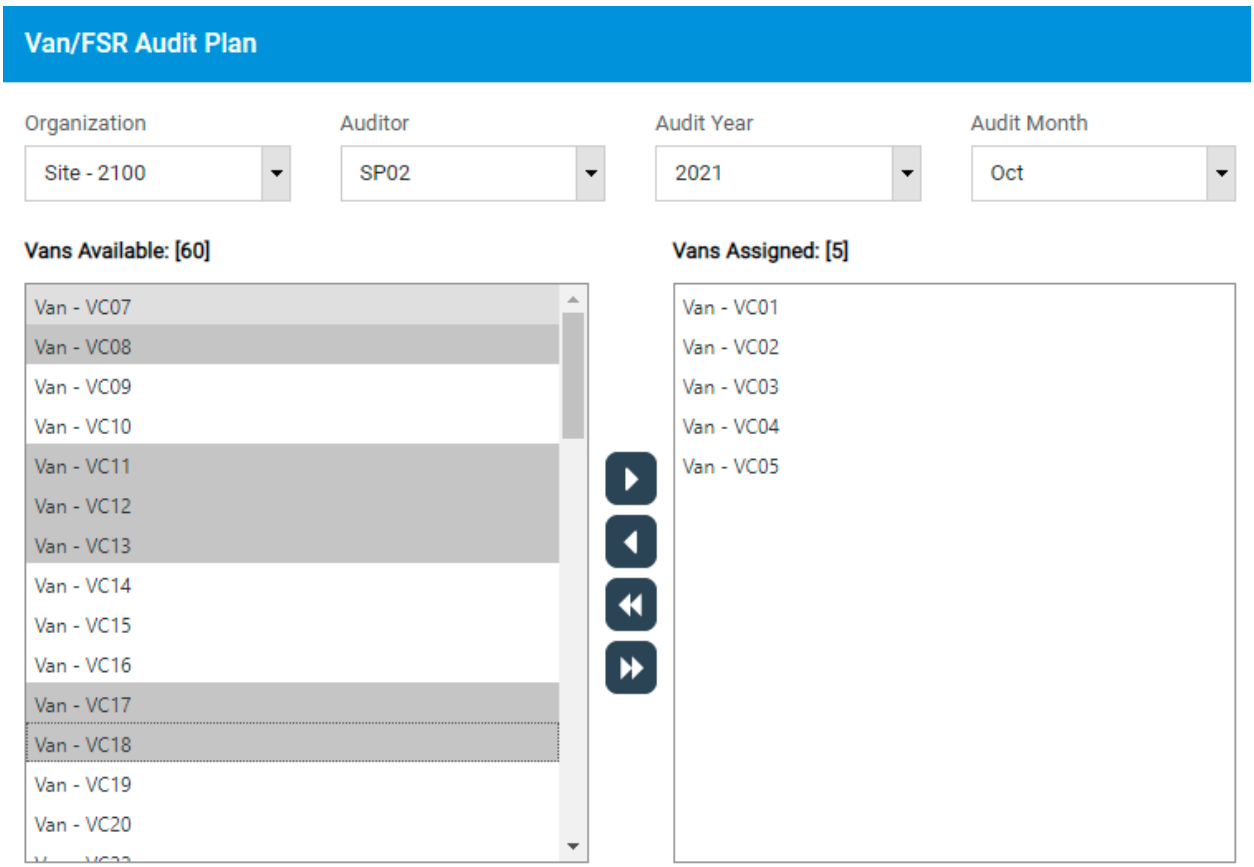

The vans available and the vans assigned will be populated.

In order to assign vans to the auditor, select the van in Available vans section, click on button.

To assign all the vans to auditor, click on button.

In order to remove a van from auditor, select the van from Assigned list, click on button.

To remove all the vans, click on button.

15. Asset Management

The organization will be allocating some assets such as chillers, display stands, freezers, etc. to the customers. You can manage those assets in this section.

15.1 Manage Asset types

You can add, edit, or delete an asset using this option. All the assets configured in the system will be displayed. You can also filter the results.

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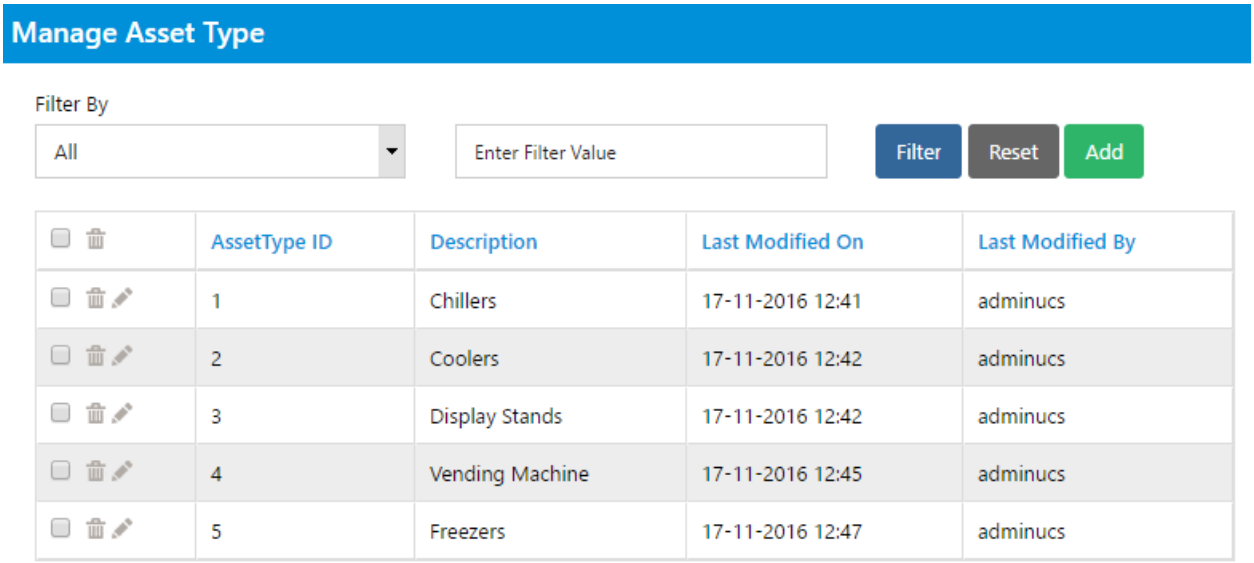
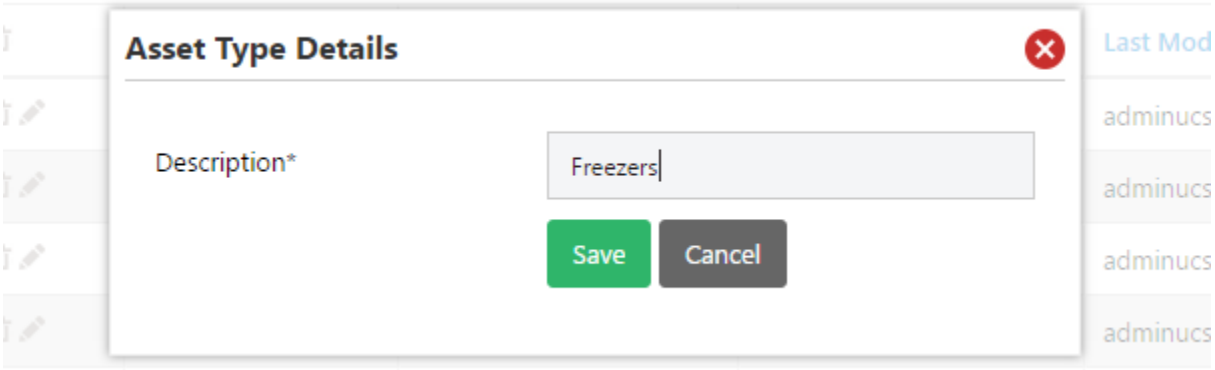


To add a new asset type, click on 'Add button'

Enter the asset description and click on Save.



You will be acknowledged 'Successfully saved'. Click OK to continue.

Click on edit and delete icon to edit or delete an asset.

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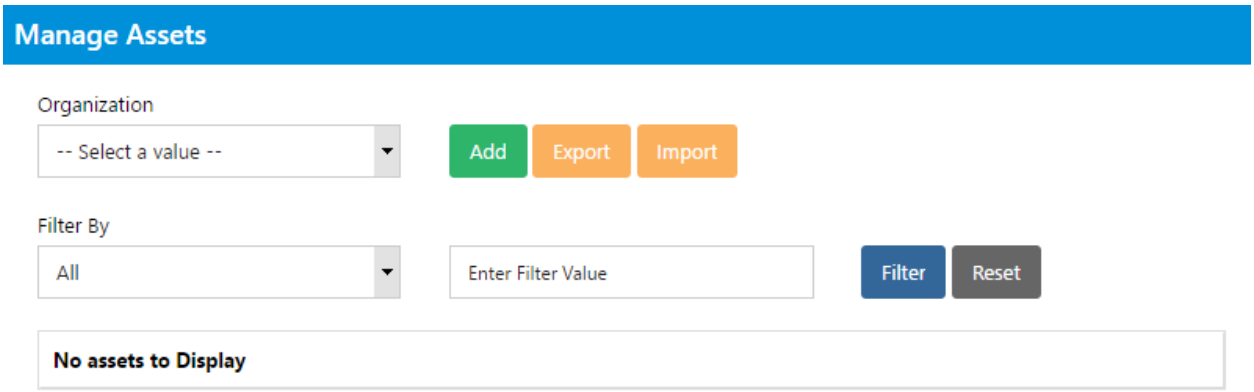
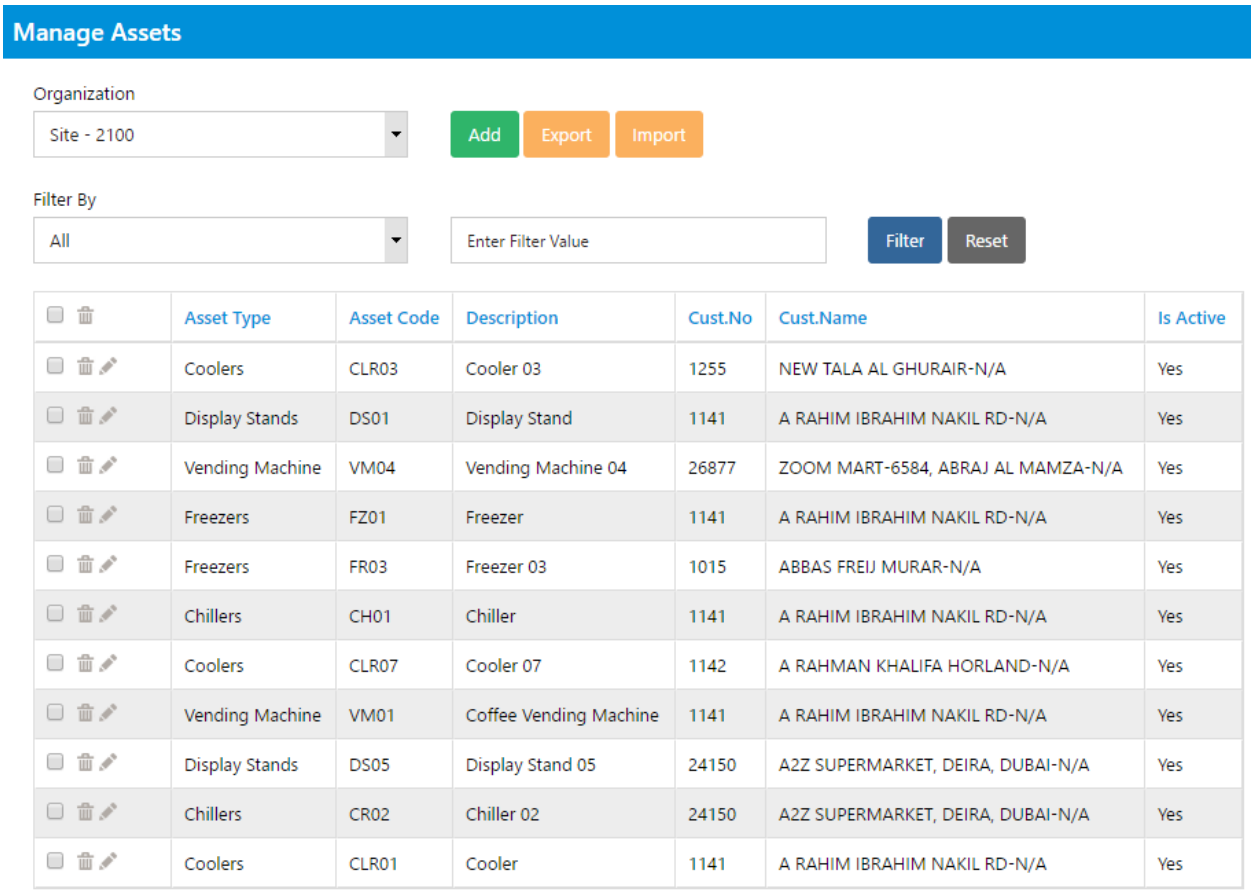
15.2 Manage Assets

You can view the allocated assets and allocate new assets in this option.



To view all the allocated assets, select the organization. Then click on Filter.

You can use the filter to narrow down the results.



	Asset Type	Asset Code	Description	Cust.No	Cust.Name	Is Active
	Coolers	CLR03	Cooler 03	1255	NEW TALA AL GHURAIR-N/A	Yes
	Display Stands	DS01	Display Stand	1141	A RAHIM IBRAHIM NAKIL RD-N/A	Yes
	Vending Machine	VM04	Vending Machine 04	26877	ZOOM MART-6584, ABRAJ AL MAMZA-N/A	Yes
	Freezers	FZ01	Freezer	1141	A RAHIM IBRAHIM NAKIL RD-N/A	Yes
	Freezers	FR03	Freezer 03	1015	ABBAS FREIJ MURAR-N/A	Yes
	Chillers	CH01	Chiller	1141	A RAHIM IBRAHIM NAKIL RD-N/A	Yes
	Coolers	CLR07	Cooler 07	1142	A RAHMAN KHALIFA HORLAND-N/A	Yes
	Vending Machine	VM01	Coffee Vending Machine	1141	A RAHIM IBRAHIM NAKIL RD-N/A	Yes
	Display Stands	DS05	Display Stand 05	24150	A2Z SUPERMARKET, DEIRA, DUBAI-N/A	Yes
	Chillers	CR02	Chiller 02	24150	A2Z SUPERMARKET, DEIRA, DUBAI-N/A	Yes
	Coolers	CLR01	Cooler	1141	A RAHIM IBRAHIM NAKIL RD-N/A	Yes

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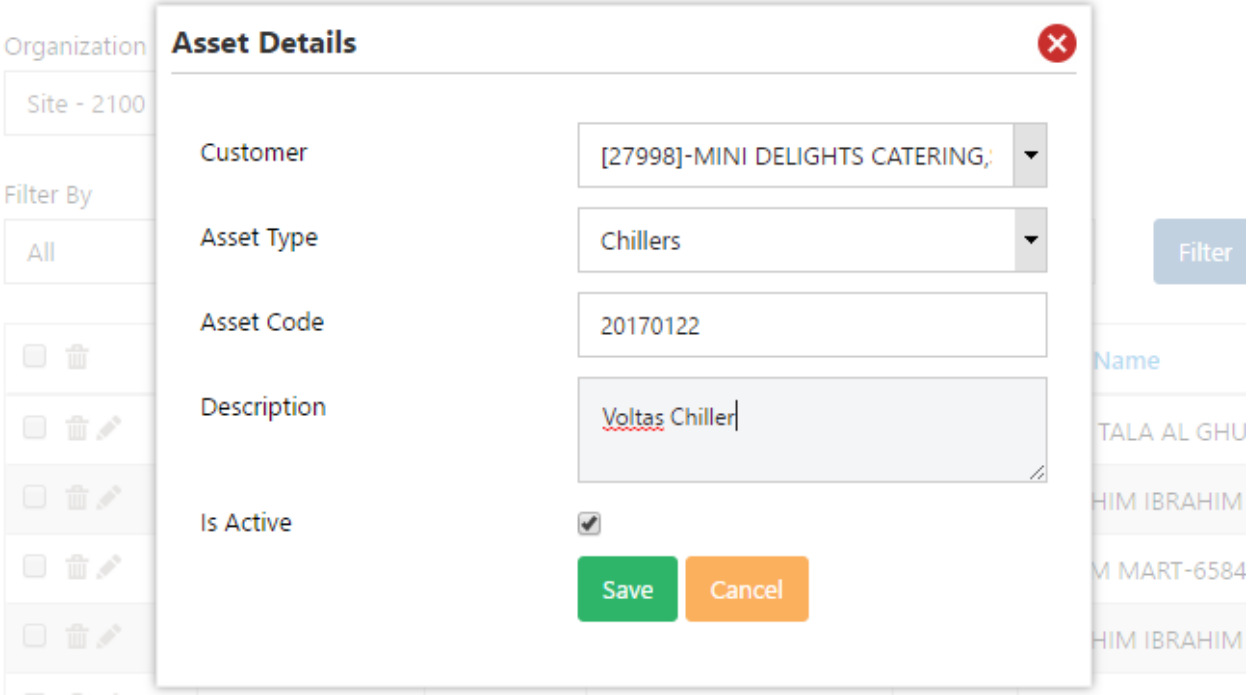
To allocate a new asset, click on Add.

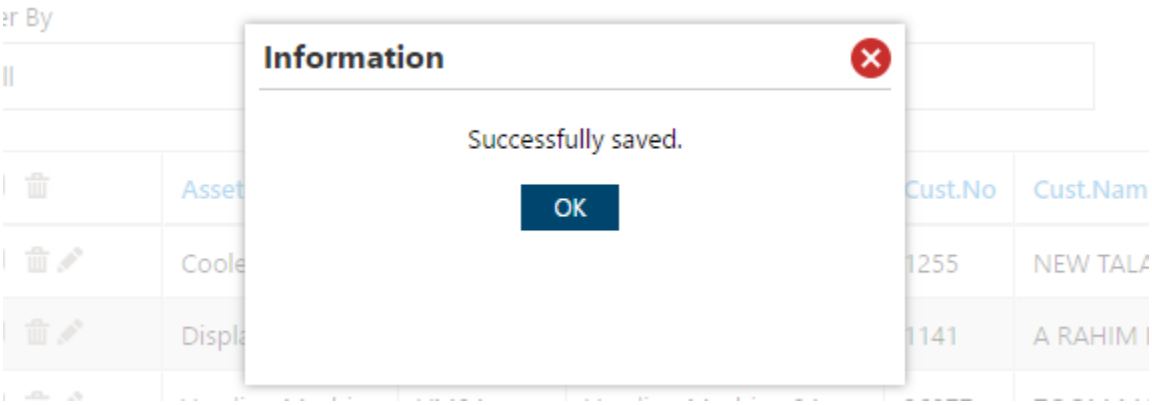
Select the customer name from the drop down.

Enter the asset type, asset code and description. Keep 'Is Active' checked if the asset is active.

Click on 'Save'.



You will receive an acknowledgement. Click OK to continue.



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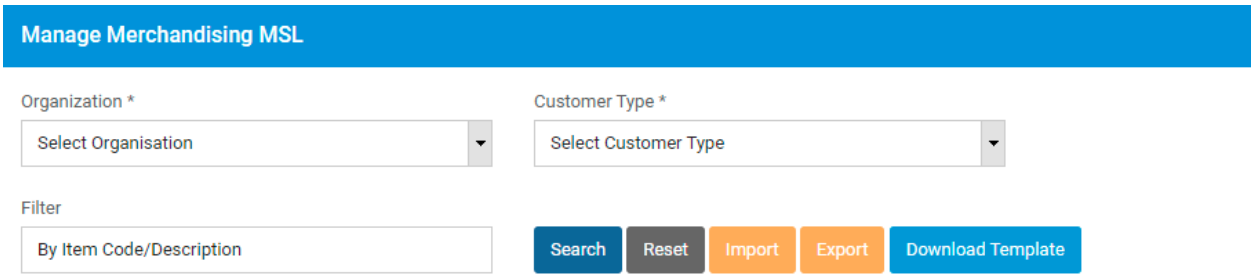
16. Merchandising

In Merchandising section, you will be able to define merchandising related MSL, Planogram, and POSM images.

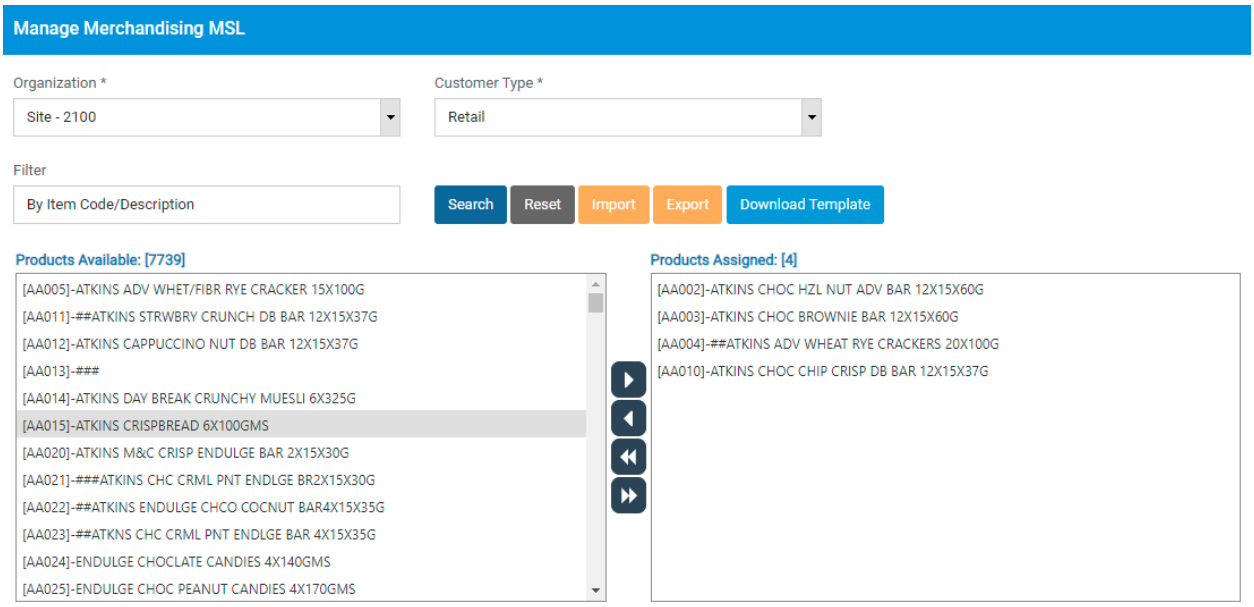
16.1 Manage Merchandising MSL

Using this screen, you will be able to define the MSL items against which availability will be captured during merchandising activity on mobile application.



Select an organization and customer type, then click on Search button.

Assigned products and available products list will be populated.



To assign a product as MSL, select a product in available products list and click on button.

To assign all the products, click on button.

To unassign a product, select the product in the assigned list and click on button.

To unassign all the products, click on button.

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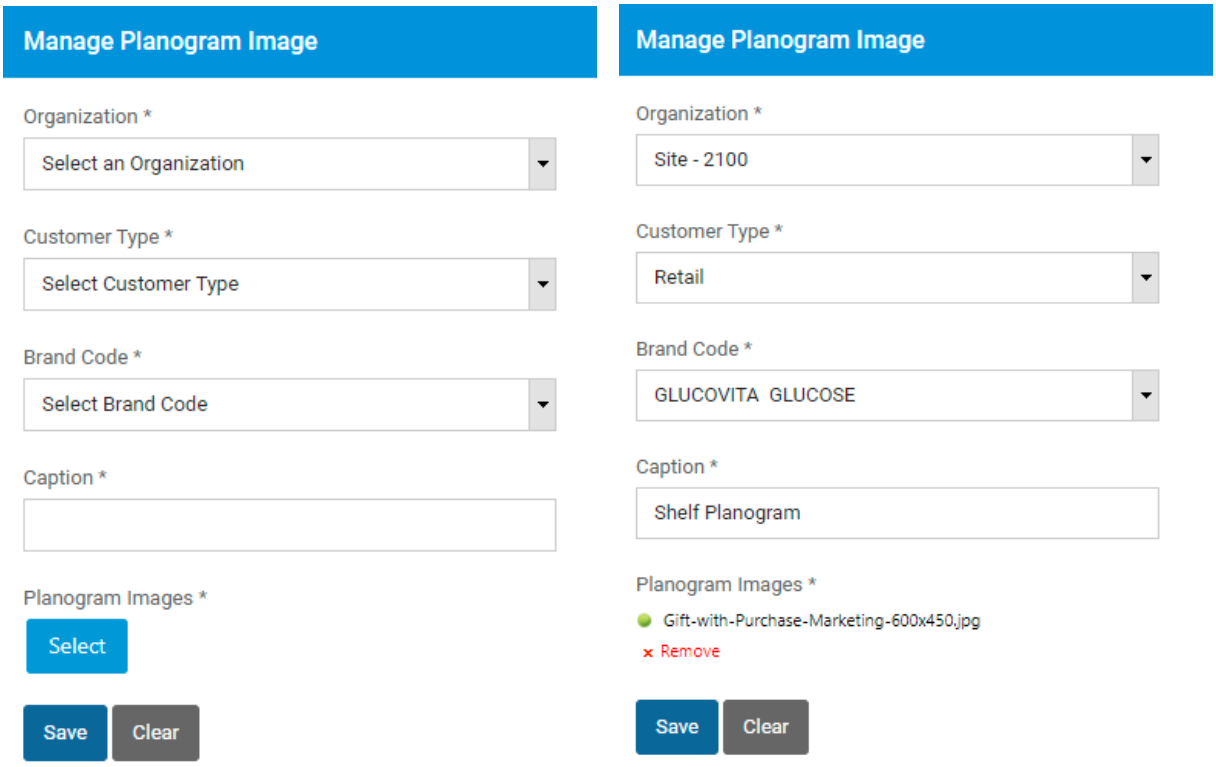
16.2 Manage Planogram Images

Using manage planogram images screen, you will be able to define the planogram images at brand level for each customer type.



Select organization, customer type, brand, and enter a caption. Click on Select button to choose the planogram file to be uploaded. Click on Save button to save Planogram image.

16.3 Manage POSM Images

Using Manage POSM Images screen, you will be able to define POSM images at brand level for each customer type.

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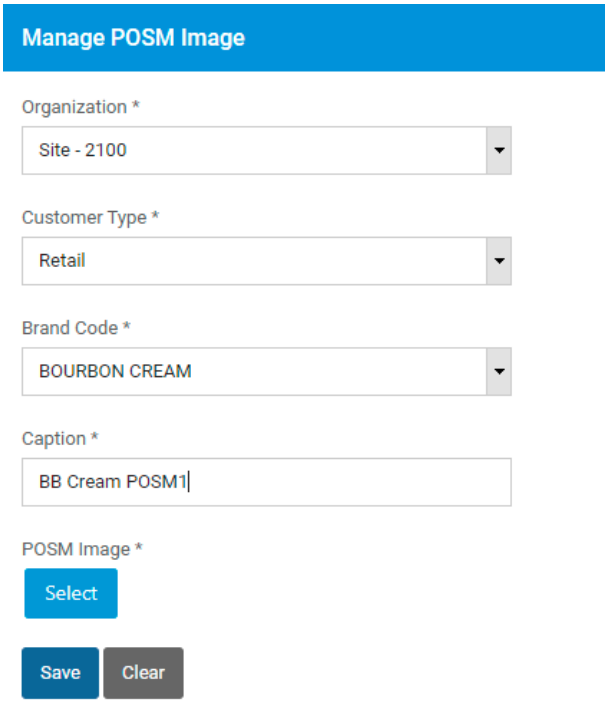
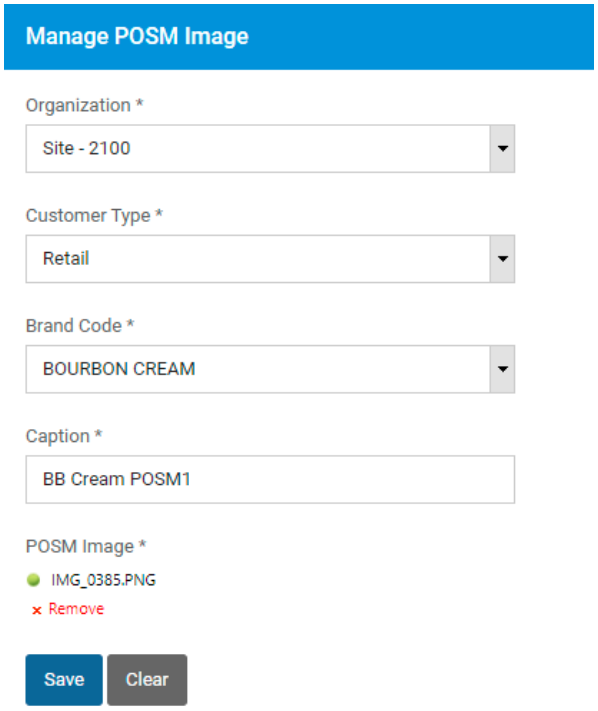




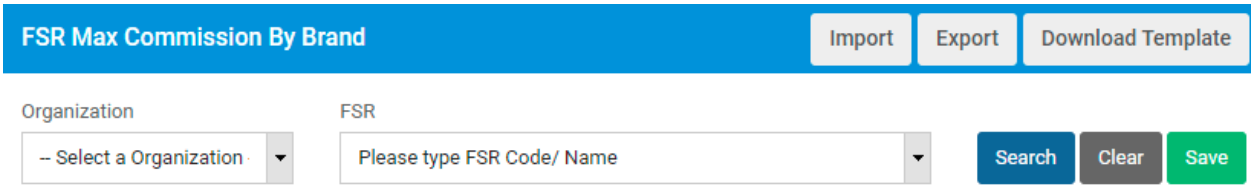
Select Organization, Customer type, Brand, and Enter caption. Click on Select button to choose the POSM image. Click on Save button to save the POSM image.

17. Commission

Using Commission related screen, you will be able to manage the maximum achievable commission, manage payouts slabs, and to generate and finalize the commission amount.

17.1 FSR Max Commission

Using this screen, you will be able to define the maximum amount that an FSR can achieve as commission by generating sales for a particular brand.



Select the organization and select an FSR. Click on Search button to view the existing definition for the FSR.

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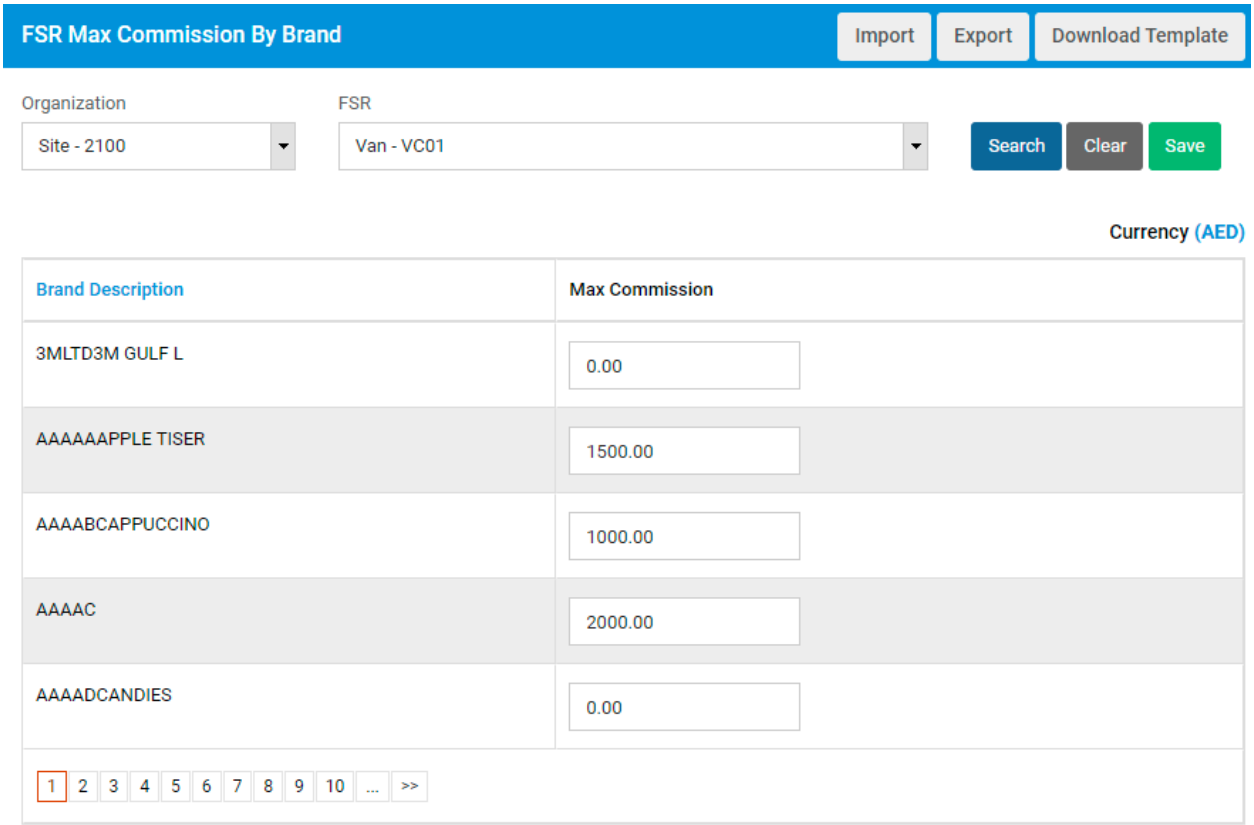
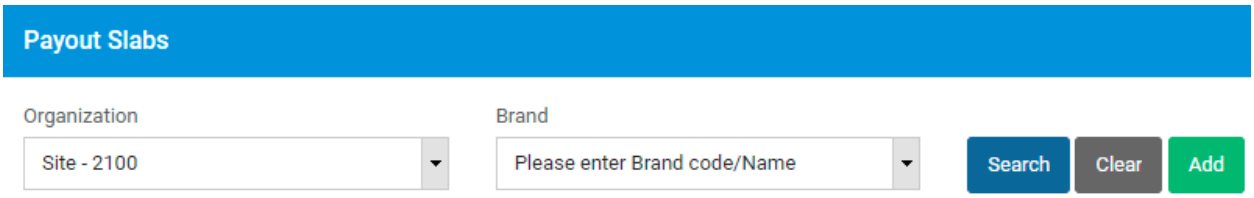


If the maximum commission is to be updated for any brand, modify the value in Max Commission column and click on Save button.

You can also import the maximum commission definition using an excel file by clicking on Import button.

17.2 Payout Slabs

In Payout slab definition screen, you will be able to define what percentage of maximum achievable commission is to be given when they achieve a slab by generating the sales.



Select an organization and a brand. Click on Search button to view existing slabs.

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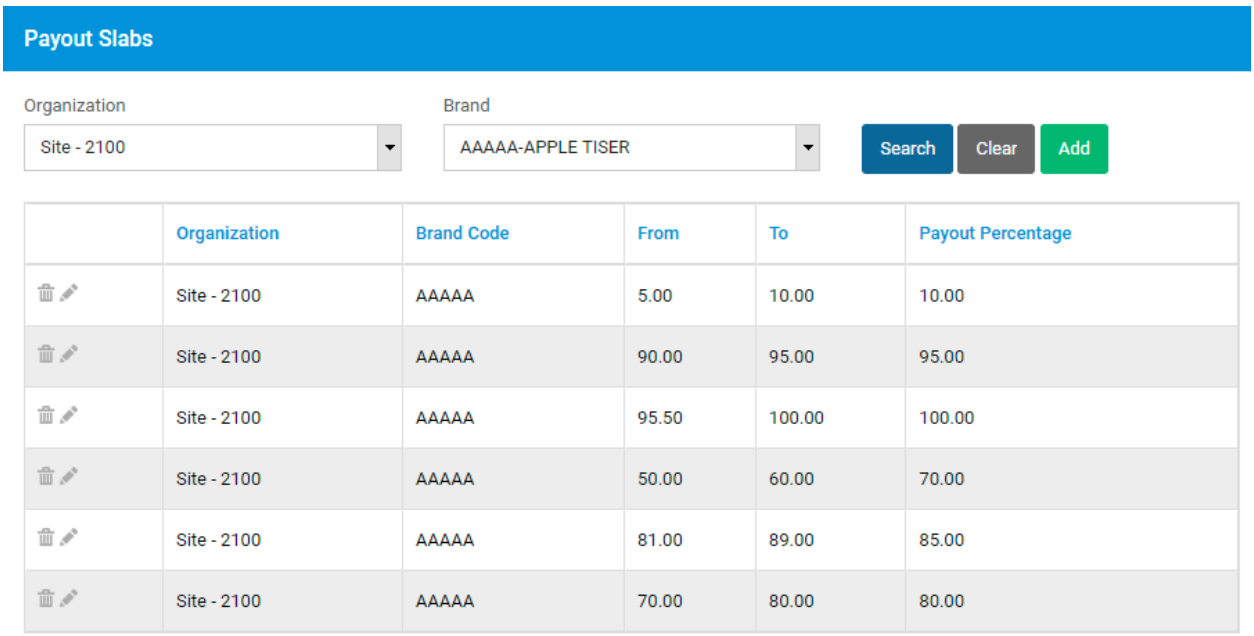
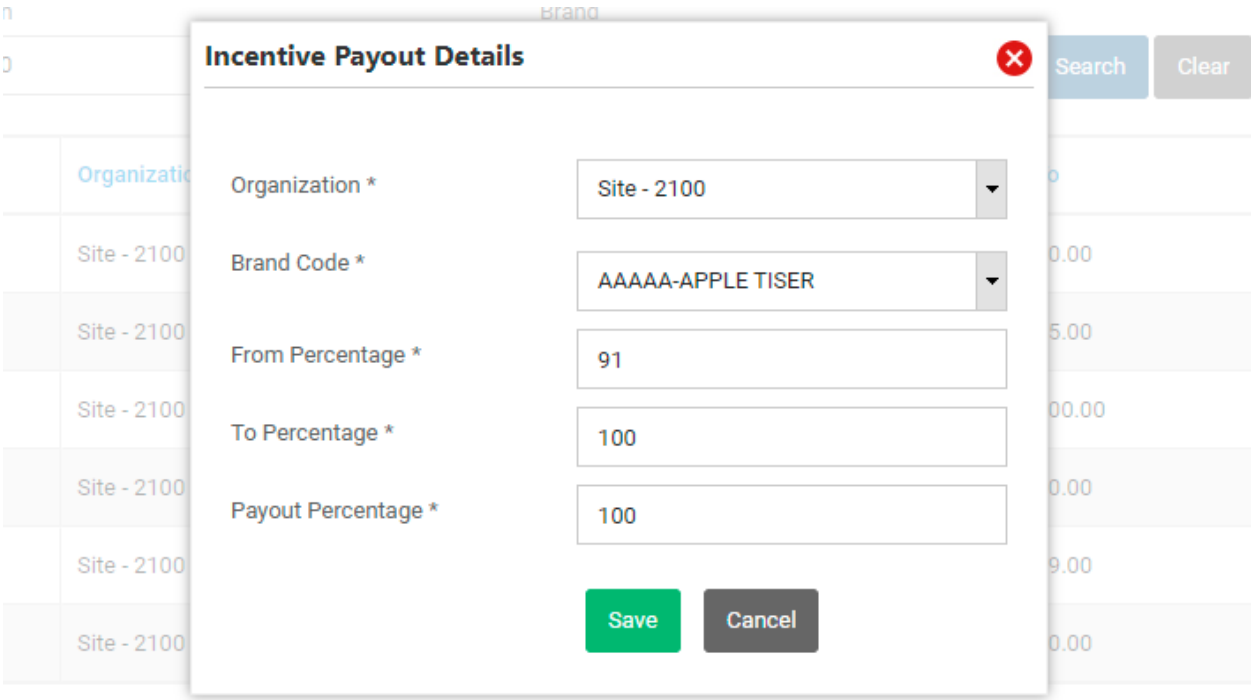


	Organization	Brand Code	From	To	Payout Percentage
	Site - 2100	AAAAA	5.00	10.00	10.00
	Site - 2100	AAAAA	90.00	95.00	95.00
	Site - 2100	AAAAA	95.50	100.00	100.00
	Site - 2100	AAAAA	50.00	60.00	70.00
	Site - 2100	AAAAA	81.00	89.00	85.00
	Site - 2100	AAAAA	70.00	80.00	80.00

To add a new Payout slab, click on Add button.



Select organization, Brand, From and To percentage, and the Payout Percentage. Click on Save button to save the Slab.

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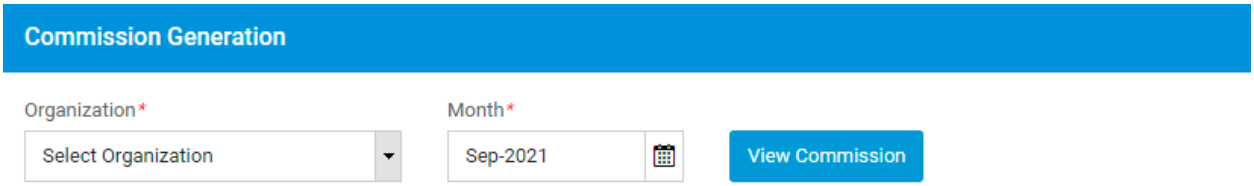
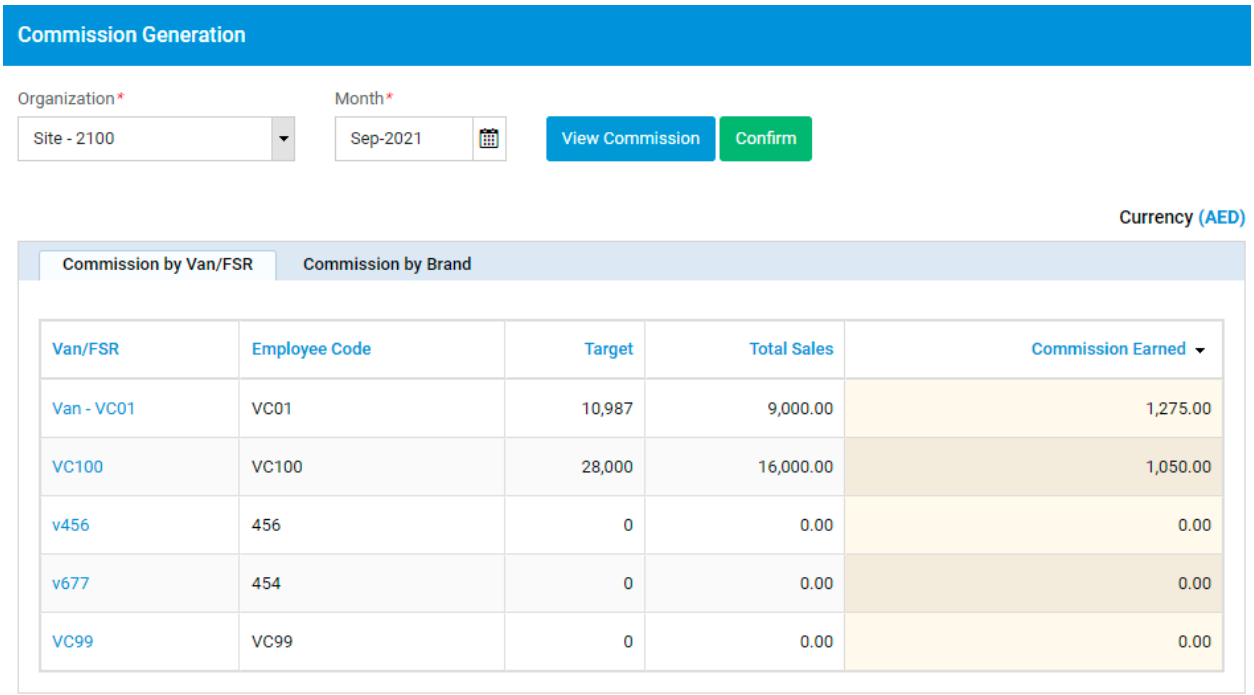
17.3 Generate Commission

This screen can be used to view the current commission achievement of to finalize and confirm the commission generated for previous months.

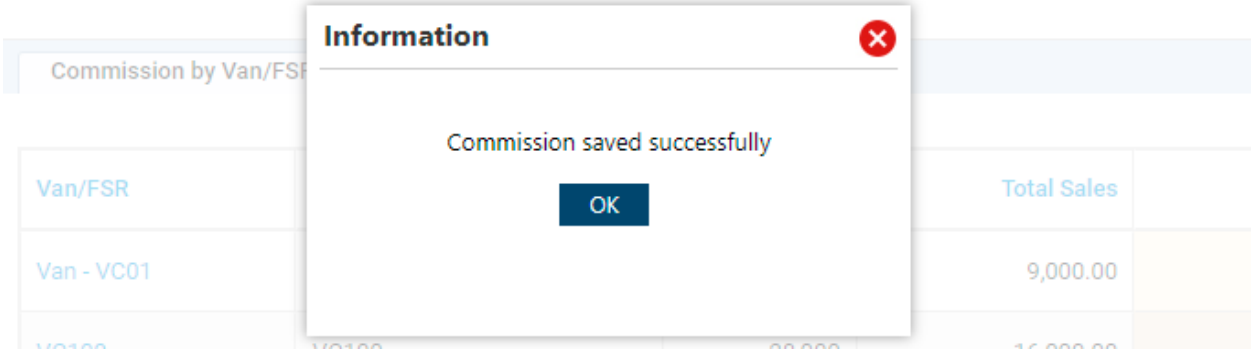


Select an organization and a month. Click on View Commission button.



Van/FSR	Employee Code	Target	Total Sales	Commission Earned
Van - VC01	VC01	10,987	9,000.00	1,275.00
VC100	VC100	28,000	16,000.00	1,050.00
v456	456	0	0.00	0.00
v677	454	0	0.00	0.00
VC99	VC99	0	0.00	0.00

Make sure that all the sales transactions have reached SalesWorx from ERP. To confirm and finalize the commission generated, click on Confirm button.



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12. Reports

Report provides an overview about total sales, customer visits, coverage, collections, returns, products and much more. The report module provides access to the predefined reports which are available in SalesWorx. Reports can be given controlled access to users of the system and can be extracted to the standard formats such as Excel and PDF. Some of the important reports in SalesWorx are the following.

12.1 Products

Report
Price listing
Product listing
Product Sales Report
Warehouse Purchase
Warehouse Purchase Download
Product Stock
Near Expiry Report
Product Out of Stock
FOC Promotions
Multi-Transaction FOC

12.2 Customers

Report
Customer List
Customer Location
Assets Review Report
New Customer List

12.3 Visits

Report
Customer Visits
Monthly Customer Visits
Daily Report
Distribution Checks
Orders
Credit Notes
Sales Returns
Invoice Discount Details
Visits Tracking Report

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Van Trail Map Report
FOC Feedback
Outlet Covered Vs Billed
Visit Exception Report
Travel Report
Fuel Expenses
Fuel Expenses Location
Van Performance
Zero Billed Customers
Detailed Zero Billed Customers
Missed Visits
Window of Customer Service - KPI
Stock Notes
Presales Delivery Order
Presales Delivery Return
Distribution Check Details
FSR Visit Objective
Missed and Non Productive visits
Missed POD
Deposit/Non-Deposit
FSR Location
Merchandising Report

12.4 Collections

Report
Collection Listing
Payment Received Summary
Held PDCs
FSR Collection
PDC Receivables
Receivables for a month
Cash Collection Print
Market Receivables
Collections
Division wise Collection
Delayed Customer Count
Delayed Trend By Van
Delayed Trend By Supervisor
Delayed Trend By Location
Delayed Trend By Division
Collection Discount
Open Invoices

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Overall Receivables

12.5 Survey

Report
Customer Survey
Audit Survey
Merchandising Survey
Market Survey
POSM Survey
Cash Van Audit Survey
Audit Missed Van
Survey Statistics

12.6 Coverage Reports

Report
Planned Coverage Report
Overall Coverage Report
Daily Coverage Report
Journey Plan Adherence
Customer Coverage Report

12.7 Stock Movement Reports

Report
Goods Receipt Report
Article Movement
Van Stock Summary
Van Load Report
Van Unload Report
Stock Requisition
Van Requisition vs Load
Monthly Van Load
Daily Stock Report
Stock Movement Report
Van to Van Stock Transfer
Purchase Report
Unconfirmed Load

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12.8 Summary Reports

Report
Van Log Report
Purchase vs Sales vs Returns
Van Activity
Van Summary by Product
Statement of Van sales
Statement of Customer Account
Price Variation Report
Monthly Business Report – Overall
Monthly Business Report – By Van
Sales Manager Scorecard
Best Sellers
Distribution report
Target vs Sales by Van
Monthly Target vs Sales by Van
Score card summary by van
Daily Sales report Summary
Daily Objective Report
Van KPI Report
Monthly FOC Report
Bill Cuts by Van
Line Cuts By Van
Ageing Report
Van Credit Limit Report
Purchase Report
Monthly Sales Report
Monthly Wastage Report
Off take summary report
Transaction Status
Vehicle Activity Report
SKU Distribution
SKU Dispersion
Revenue Dispersion
Van EOT
Daily Product Sales
Reconciliation
Presales EOT
Daywise Net Sales by van
Trade Deal Summary
OTP Summary
SMS Broadcast

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Sales Summary
Collection
EOD Settlement
3D Productivity Matrix
Active Distribution
KPI Points
Daily Sales Performance
War Room Scoreboard
FSR Assignment
Follow Up

12.9 Sales/Returns Reports

Report
Sales By Agency
Sales By Van
Sales By Product
Sales By Customer
Monthly Sales by Van
Daily Sales Report
FSR Credit Notes
Weekly Return Summary
Sales by Van/Agency (Qty)
Sales by Van/Agency
Sales vs Return by Customer Type
Outletwise – Sales/Returns
Outletwise- SKU wise Sales/Returns
Outletwise SKU wise Returns
SKU wise Sales (Period wise)
SKU wise Sales/Returns/Quantity/Value
Salesman – Outletwise Sales/Return
SKU wise Returns Periodwise
Client wise Sales/Returns
Sales by Principal
Sales by Principal/Salesman
Sales Summary
Total Group Summary Sales/Return
Group Summary Sales/Return
Excess Returns
FSR Credit Notes
FSR Credit Notes Detail
Weekly Return Summary
Sales and Discount

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Brand wise Sales Report
Sales by Product Report
Sales Volume by Product
Presales Summary
Multidimensional Sales Report
Consolidated FSR Sales Report

12.10 Productivity

Report
Productive Calls
MSL Productivity
Product Availability Report
Distribution for MSL Items
Distribution Check Details
Productivity By Van
Outlets billed – by SKU

12.11 Logs

Report
User Log Report
Device Sync Log
Sync Exception Report
Van/FSR Event Log
ERP to BO Sync Exception Log
History of Credit Details
Collection Deletion Log
Push Notiications
Recent Sync Log
Device Debug Log

12.12 Incentives

Report
Incentive Report

12.13 Others

Report
Approval Code Usage

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Bank Listing
Export Rights by User Type
Export User Rights by Users
Holiday Listing
App Control Flags
User List
Approval Request Report

12.14 Sales Target

Report
Routewise Target & Achievement
Customerwise Target & Achievement

12.15 Golden Points

Report
Golden Points Earned
Route-wise Golden Points
Golden Points Transactions
Route Achievement
Summary – Executive & ASM
Summary – Customer Level
Summary – Brand & Category

12.16 Commission

Report
Commission Achievement Report
FSR Sales Target Achievement

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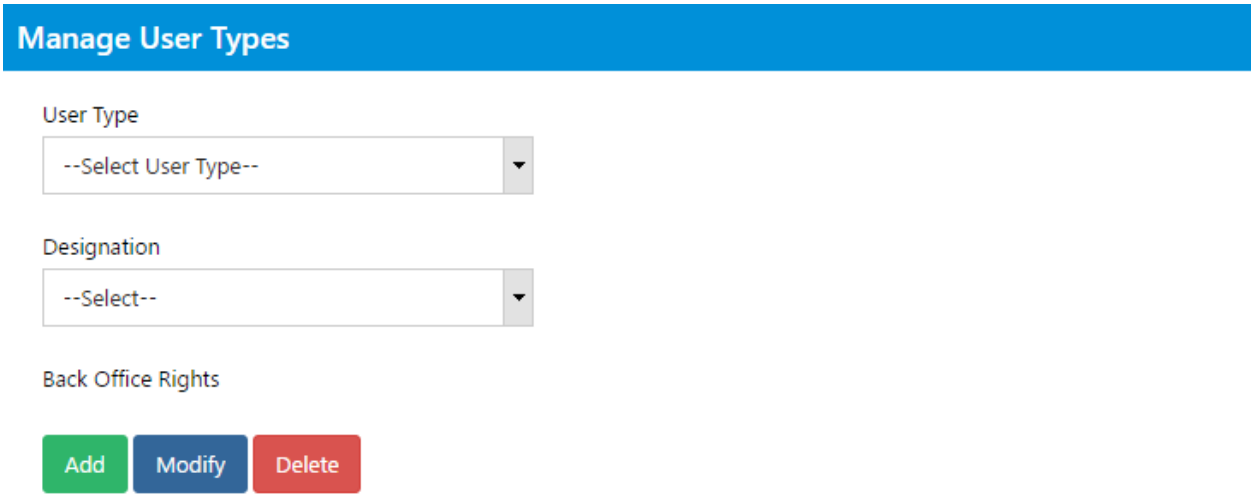
13. User Management

User management allows you to create new users, modify existing users, modify user rights, change passwords, etc.

13.1 Manage User Types

In this option, you can create a new user type, modify an existing user type by changing user rights, or delete an existing user type.



To add a new user type, click on Add.

Enter a new name for the user type.

Choose a designation from the dropdown list.

Enable the features to be allowed for the user with this user type. This will help you restrict the users from accessing the modules which are not relevant to them.

It is recommended to enable the 'Change Password' feature under 'User Management' for all the users. It will help them change their password when needed.

Once the required features are enabled, click on Save.

The new user type will be added.

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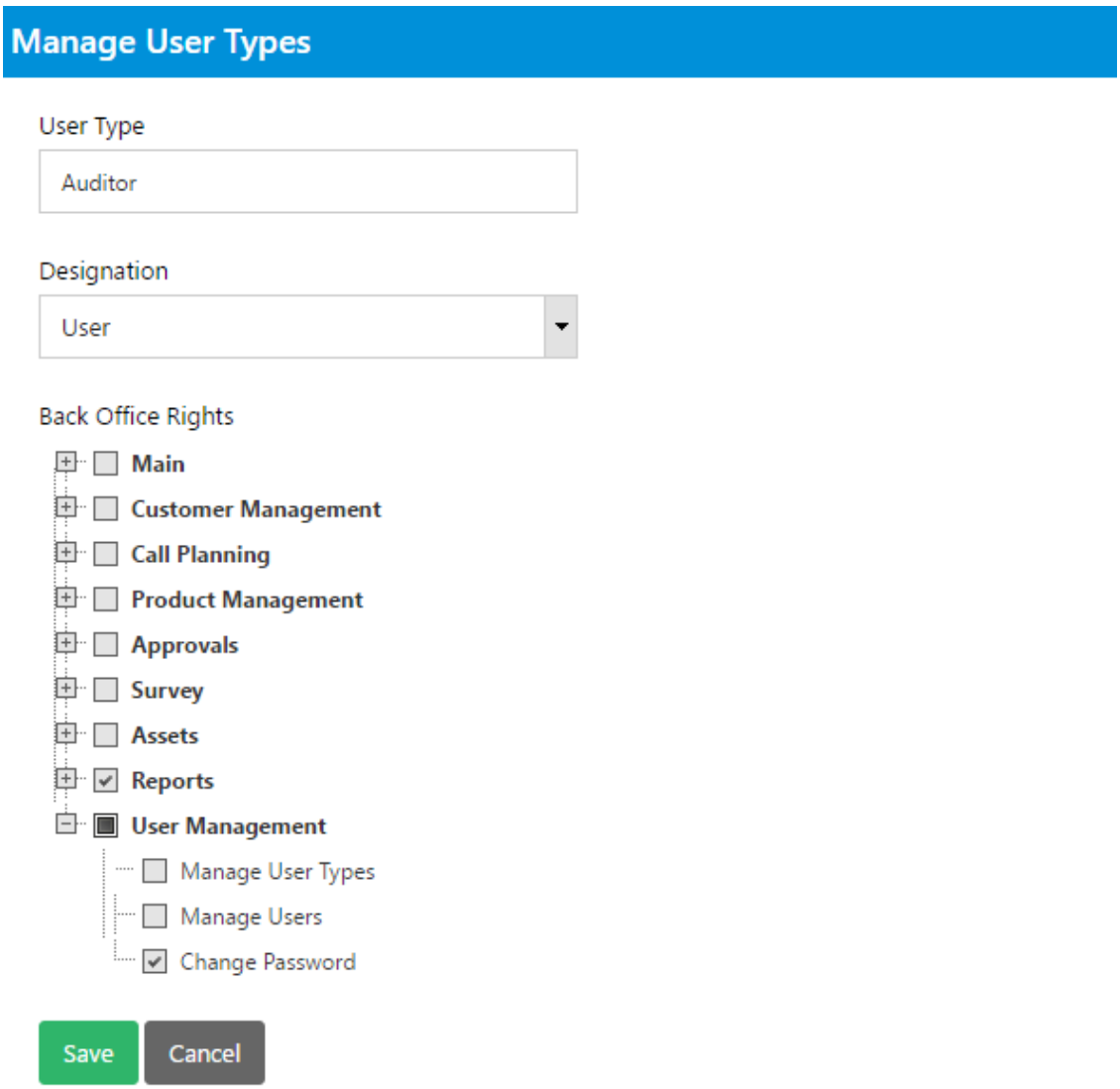
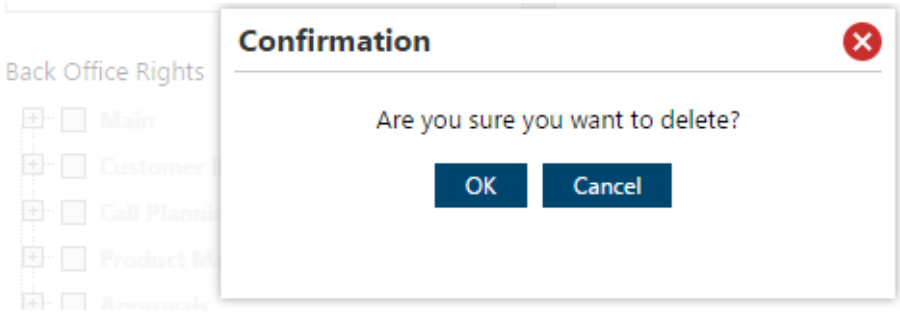


To modify a user type, select a user type from the dropdown list. Then click on Modify. Enable or disable the features and click on Update button.

To delete a user type, pick a user type from the dropdown list. Click on Delete button. Click OK to confirm deletion.



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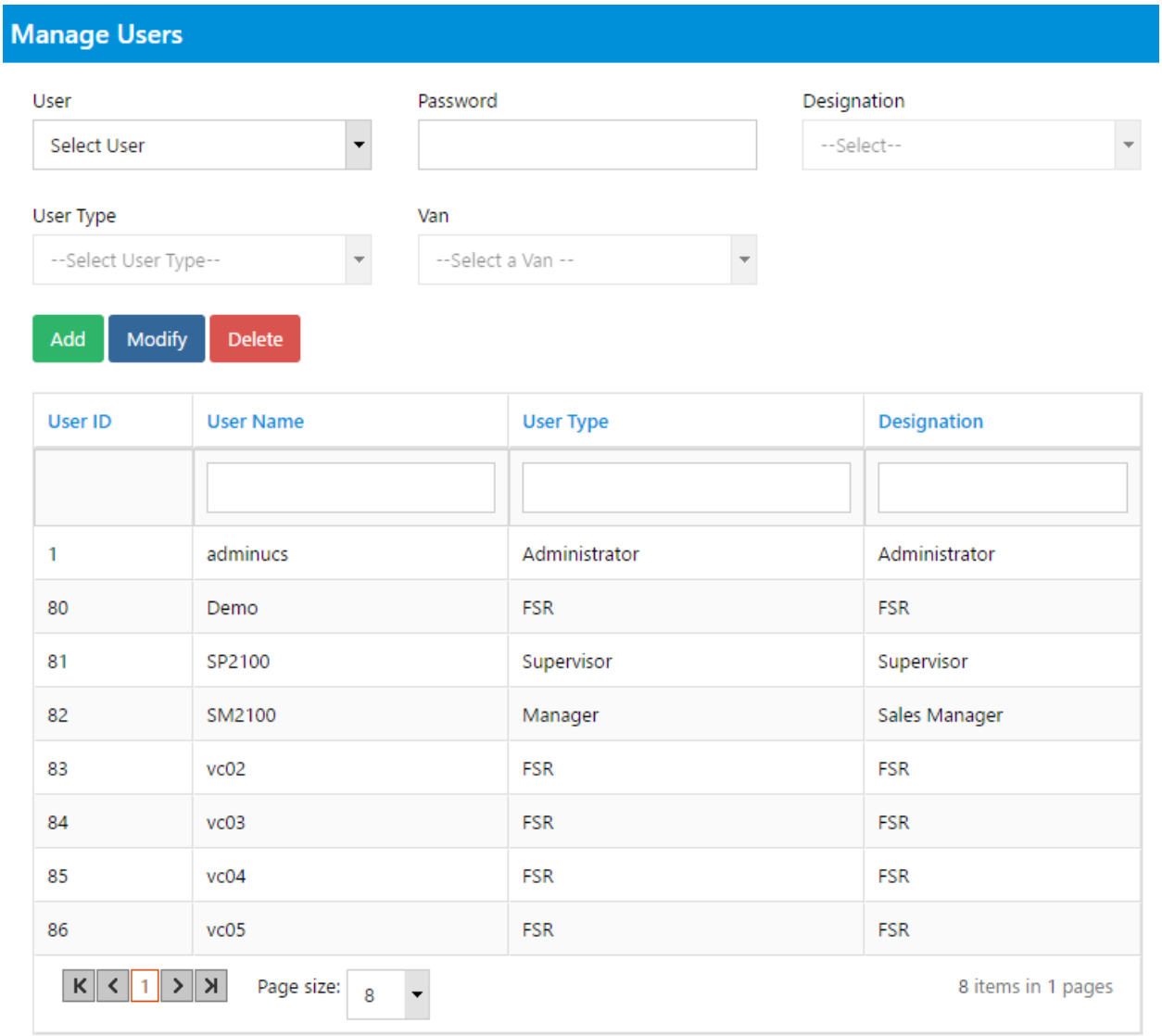
13.2 Manage Users

You can add a new user, modify an existing user, or delete a user using this feature.

You will be able to view all the users created in the system when you open this page.



To add a new user, click on Add button.

Enter the new username, password, the designation of the new user, user type for the new user, and which van he/she is assigned to.

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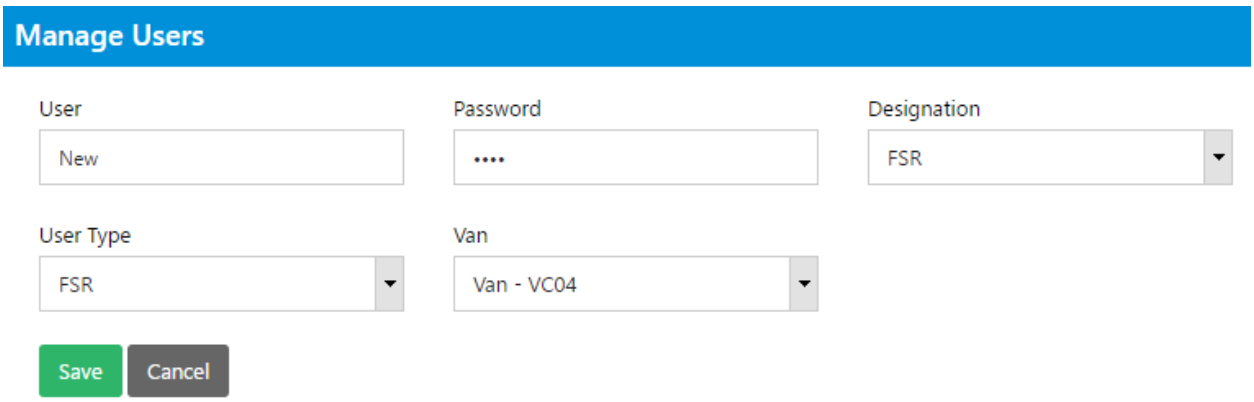


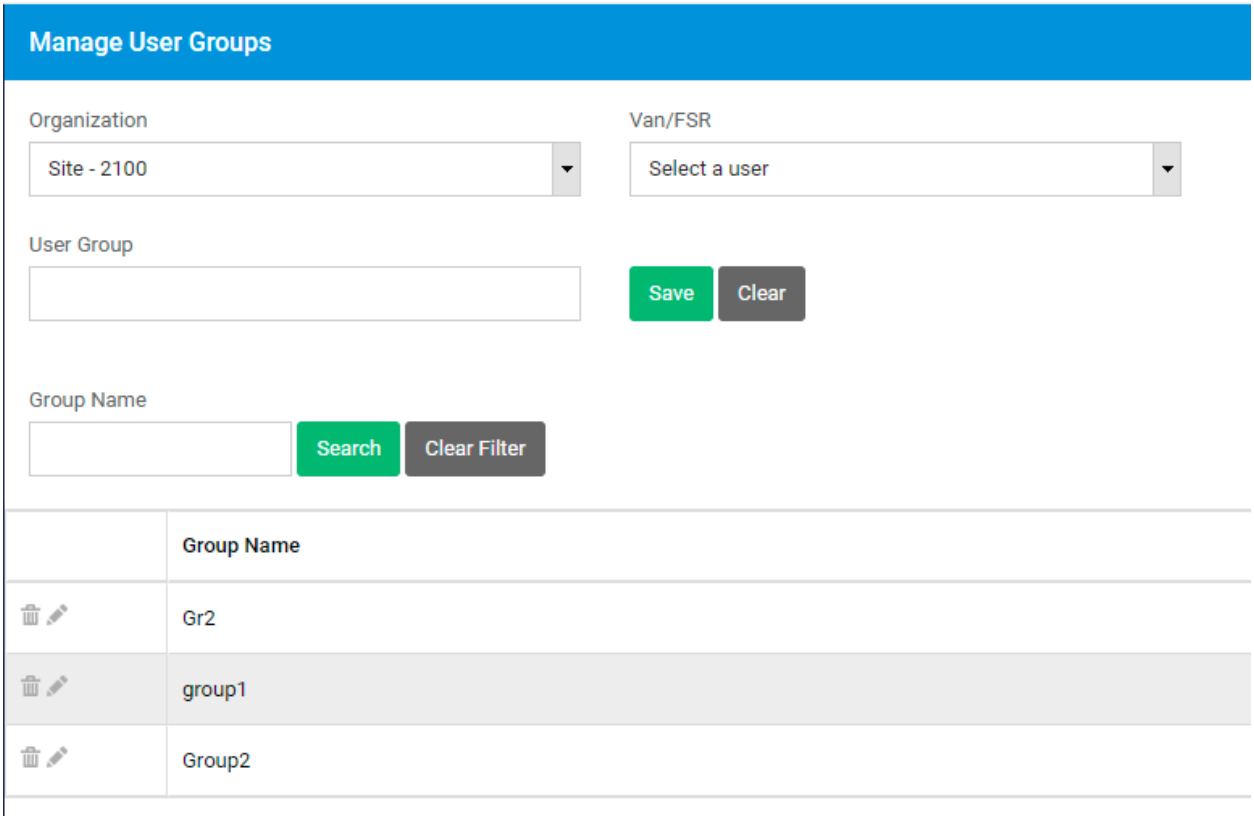
Click on Save to save the new user created.

To modify an existing user, select a user from the dropdown list, click on Modify button. You can change the password, user type, designation and the van assigned.

To delete a user, select a user from the dropdown, click on Delete button.

13.3 Manage User Groups

User groups can be created using this screen. Any SalesWorx user account can be a part of a user group. If a set of users are added to a group, you will be able to send a message to a group using Communication module instead of manually selecting one or more users.



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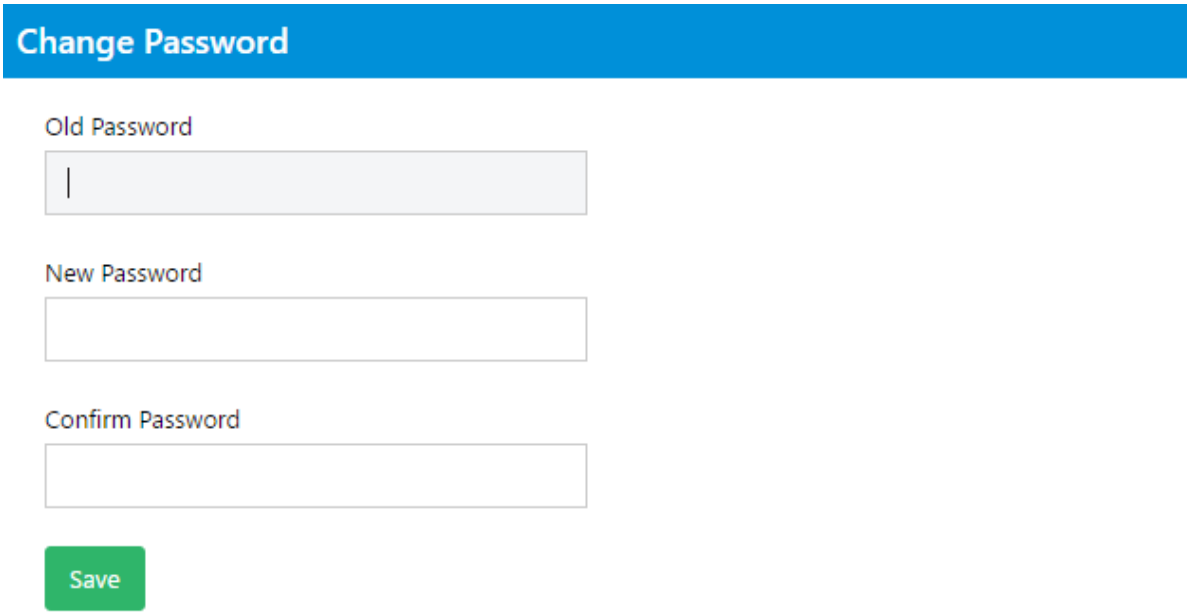
To create a new user group, select an organization, select SalesWorx users who belong to the group, and provide a group name. Click on Save button to save the user group.

You can edit or delete a user group which was already created, by clicking on edit or delete buttons.

13.4 Change Password

You will be able to change your current password using this feature.

Enter your old password, a new password, and confirm the new password, and click Save.



The user password will be updated.

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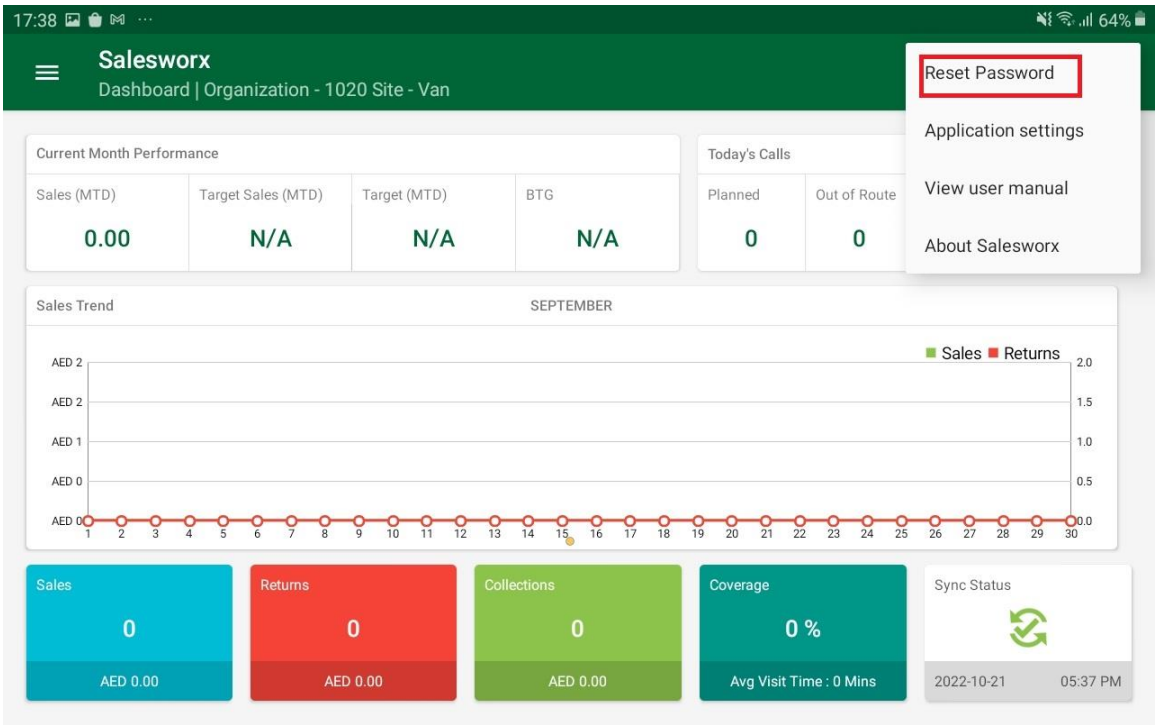
13.5 Reset / Forgot Password Policy

Change Password Process:

The following points describe the steps involved in the change-password process that is triggered from a device.

1. The mobile application user can use the **Reset Password** option from the application menu to initiate this process.



2. When the user clicks on 'Reset Password', the user will be prompted to enter the following details:
   - Old Password
   - New Password
   - Confirm Password

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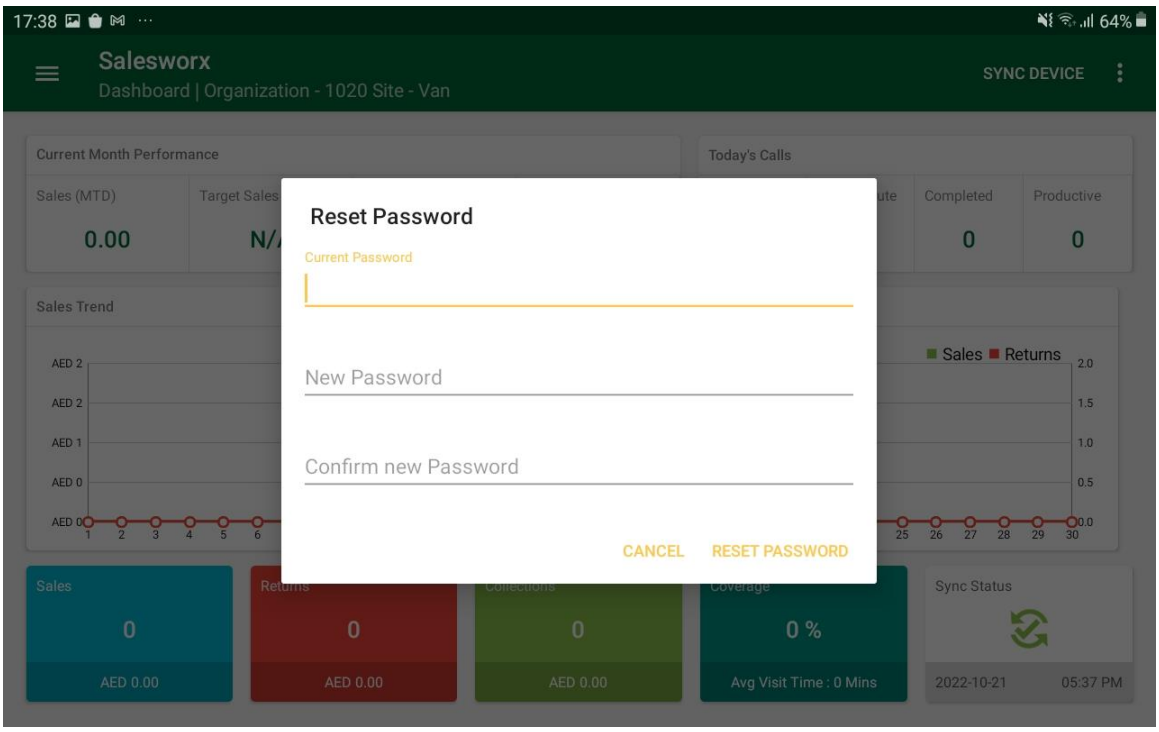
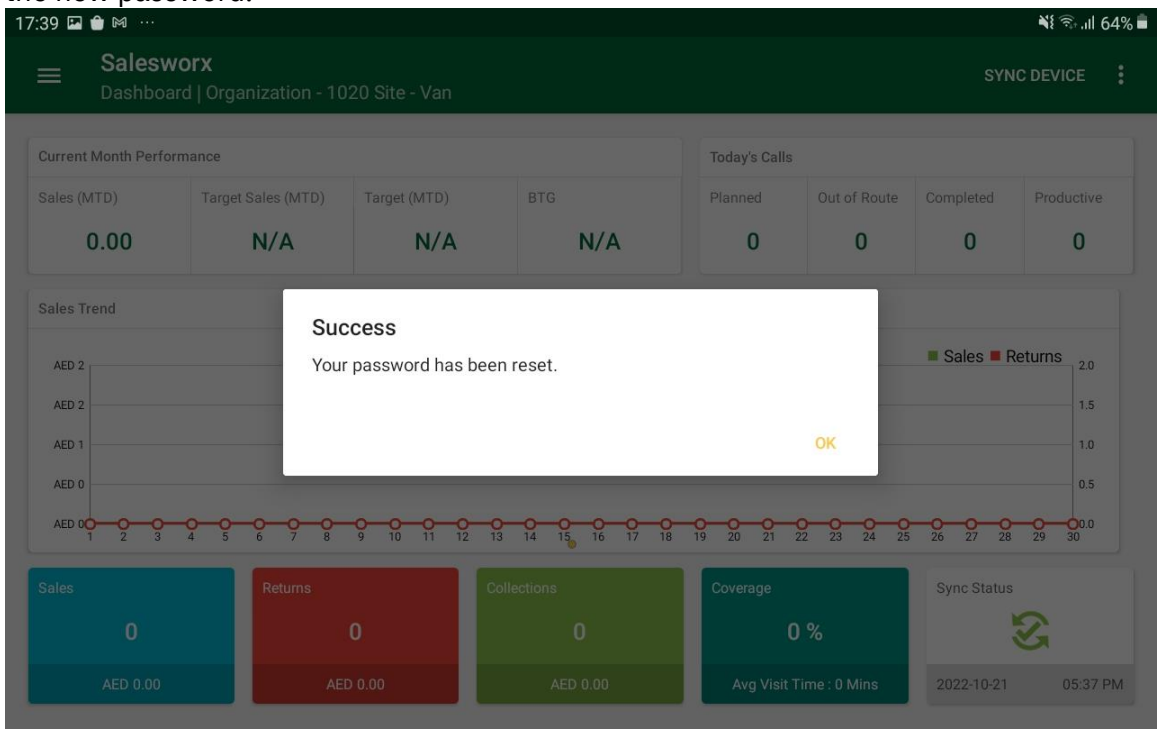


3. Once the user submits these details, if the user entered current password matches with the actual current password, the password will be reset and the user can proceed with the new password.



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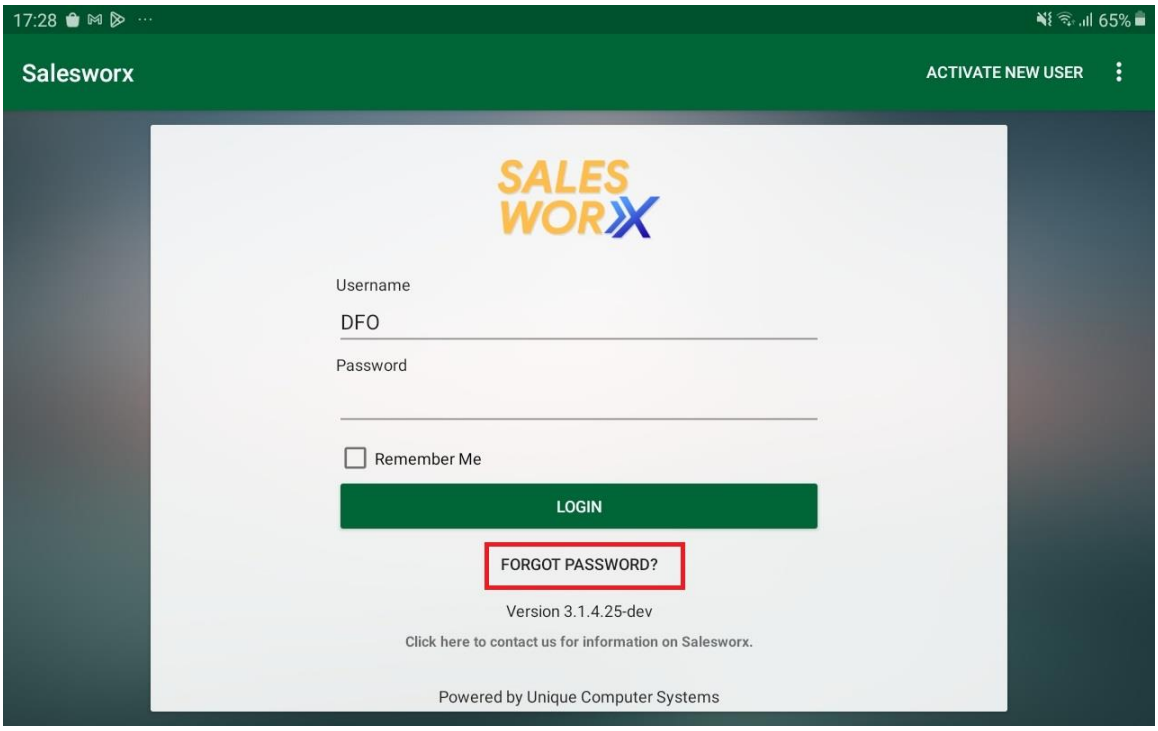
4. In case if the user entered current password does not match with the actual current password, then a relevant error message is shown to the user.

Forgot Password Process:

The following points will describe the steps involved in the password-reset process that will be triggered from a mobile application when the user forgets his current password.

1. The mobile application user can use the **Forgot Password** option from the Login screen to initiate this process.



2. The user is prompted to enter the following details:
   - Username
   - New Password
   - Confirm Password

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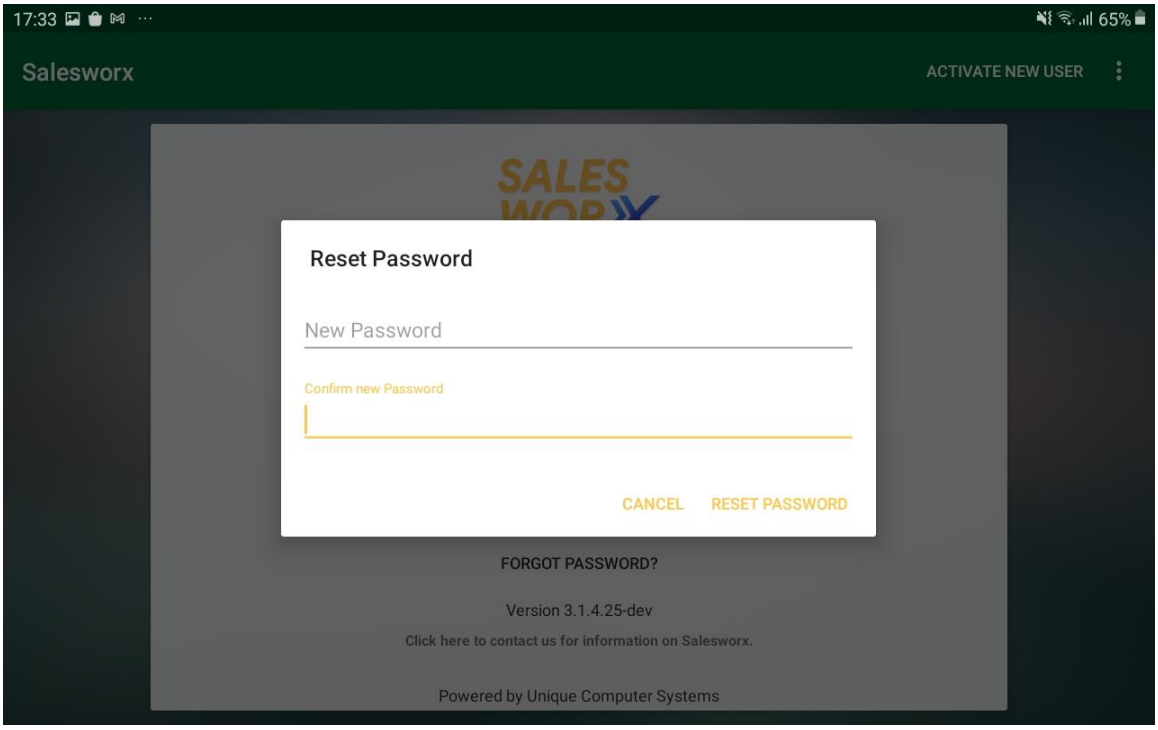
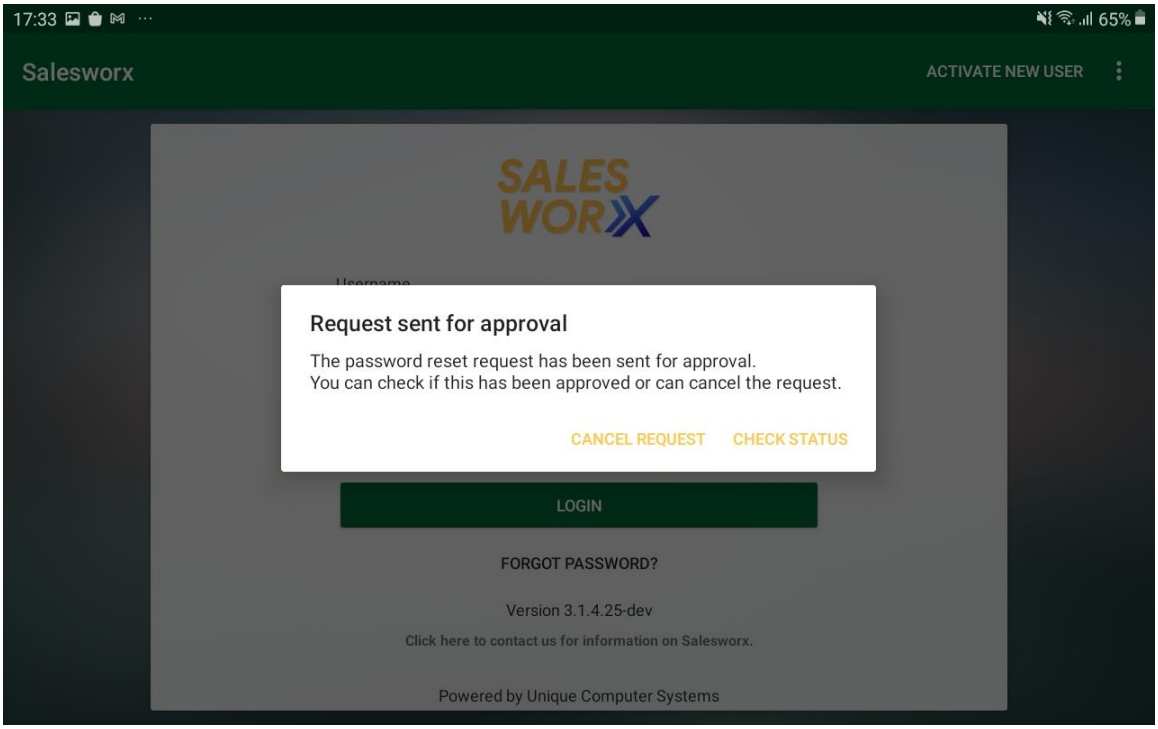


3. Once the user clicks the button '**RESET PASSWORD'** a progress dialog is shown to the user, while in background the status of this request will be verified from the Backoffice application.

Screenshot for the pop up from the device.



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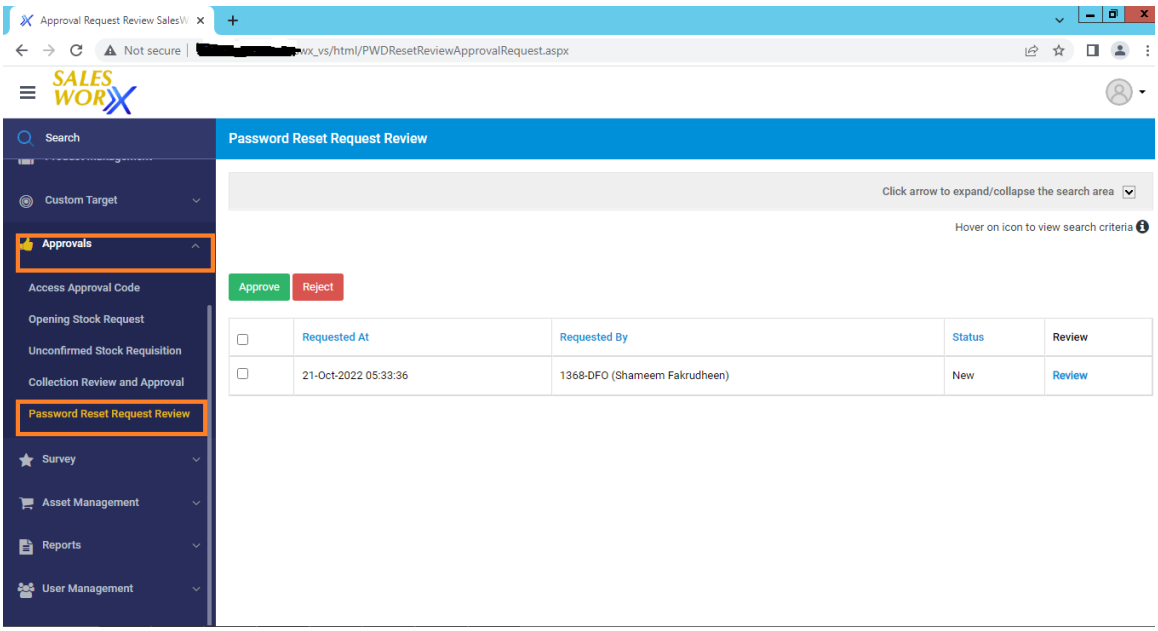
4. If an admin email address is available and configured, a password-reset approval-request email will be sent to the designated admin user(s)/supervisor on the back-office. This email will have an approval/rejection link so that they can initiate the action directly from that itself. The link on the email will redirect to the back-office application.

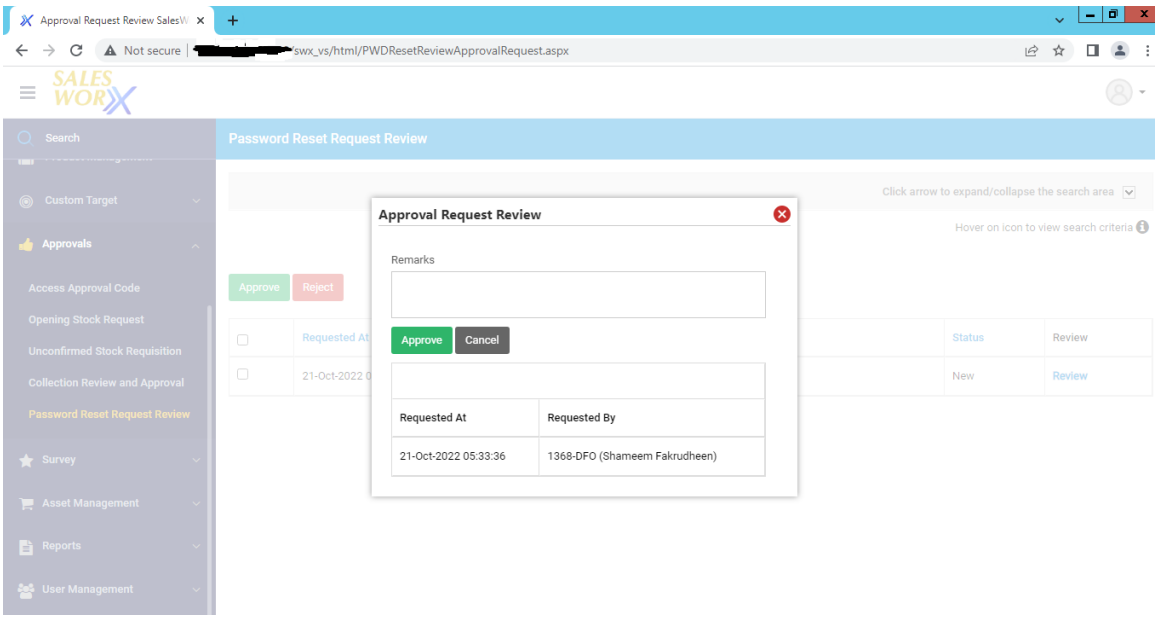
5. From the back-office application, the supervisor can verify and approve the request from the user. For that, please navigate to **Approvals>Password Reset Request Review**. From there, the supervisor can Approve/Reject the request.
   Please note that the request will expire in 5 minutes. So, the user and supervisor should be in touch with each other, when they made the request to change the password.



6. There will be an option to reject the request as well. If it is rejected then the status of this request is updated accordingly with a rejection message.

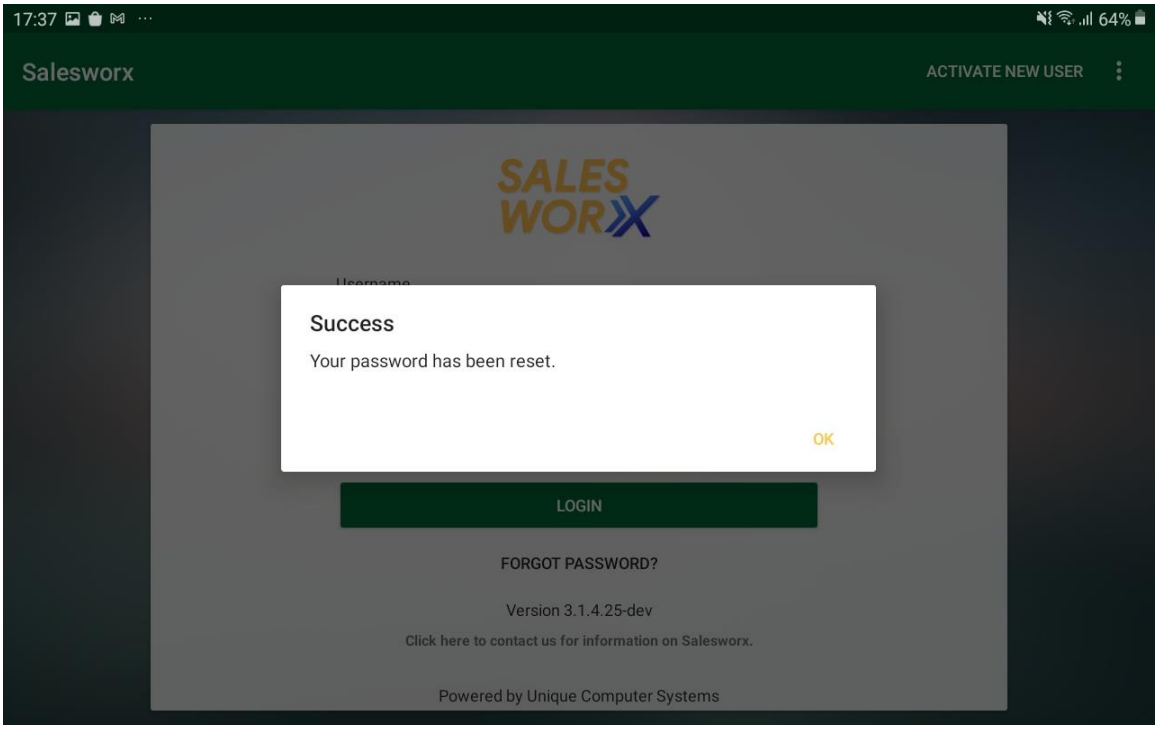
7. Approval Request Review

P.O. Box: 21419. Sharjah, U.A.E.
Tel: (971) 6 5254491
Fax: (971) 6 5254343
E-mail: info@ucssolutions.com



By clicking on 'Approve' button, the supervisor can approve the request.

Once the supervisor approves the request from back office, the mobile application updates the same password on the device as well.



P.O. Box: 21419. Sharjah, U.A.E.
Tel: (971) 6 5254491
Fax: (971) 6 5254343
E-mail: info@ucssolutions.com

General Notes:

a) The Administrator/Supervisor email that would receive the authorization request needs to be secure. It should be accessible only by the authorized who can approve the password change request.

14. Version History

This section is intended for internal purposes only. Any changes made to this document has to be logged with proper version number, description on the changes made, date of modification and the person who have updated it.

This section is to be excluded when the document is being shared with existing or new customers.

Version	Description	Date	Updated By
2.0	Created as a standard document which contains all the screens of the application. This contains the modules which are currently under development. This will be the base document for reference from 6-Oct-2021.	6-Oct-2021	Amin Mohammed [Product Specialist]
2.1.0	Added Changes of ASR-Agthia 29-FOC Invoice,32-Overlapping assorted bonus,034 (A)- Provision to block the transactions below MOA amount.	24-Oct-21	Ujwala Poojari [Presales Executive]