PhilCom | SoA

User Guide

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About the System

The main function of this system is to help users send thousands of SoA (Statement of Account) to its designated client's emails.
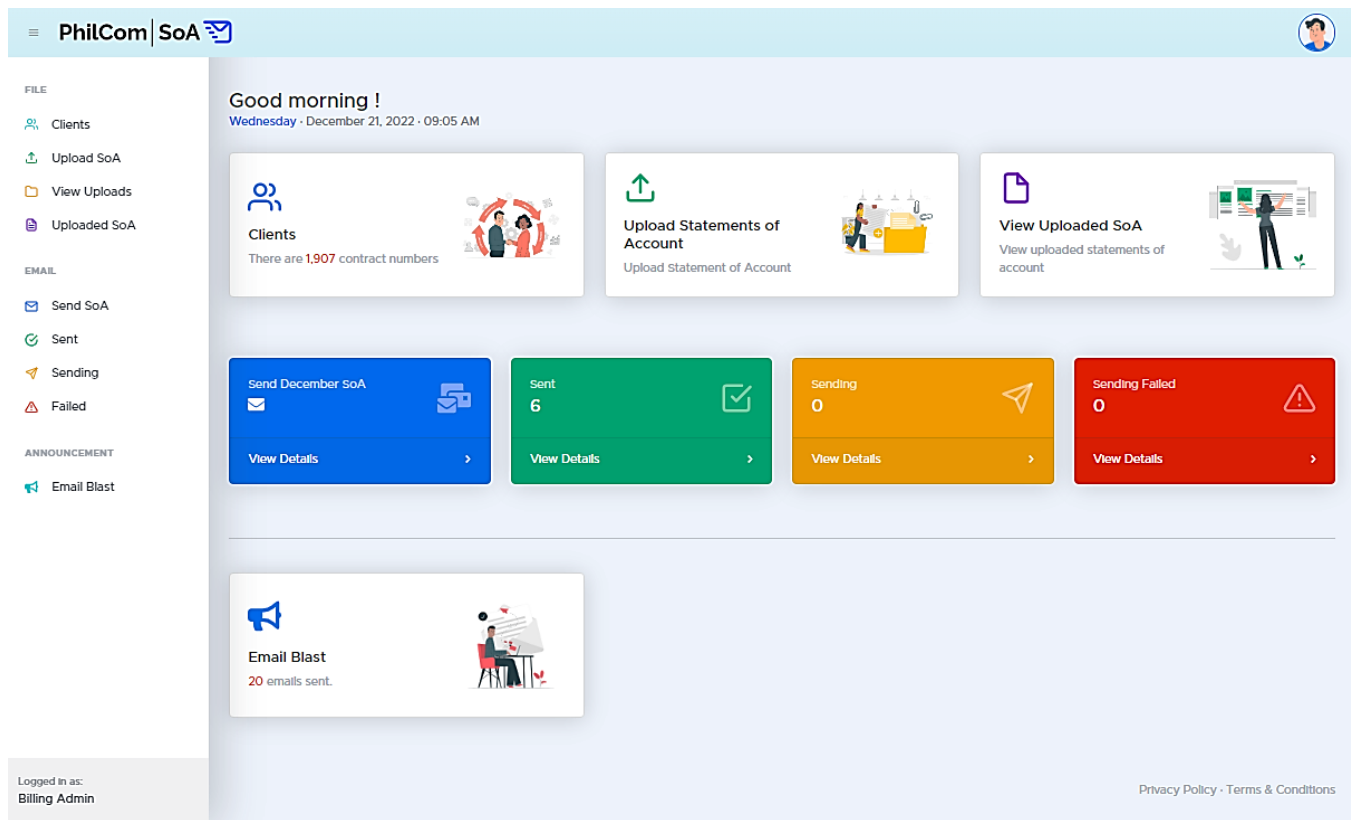
- URL = https://mailmyinvoice.philcom.com/
- It must be opened on Google Chrome in order to access all system features.

(Figure 1.0 Login Page)

Login Page

- Enter email address and Password given by the administrator
- Successful login will redirect user to the homepage.

(Figure 1.1 Homepage)

Homepage
- Homepage consist of:
    - Clients
    - Upload Statements of Account
    - View Uploaded SoA
    - Send SoA
    - Sent
    - Sending
    - Sending Failed
    - Email Blast
- The homepage may vary depending on the user's role

(Figure 1.2 Clients page)

Clients
- Clients must be the very first thing to check before proceeding to any actions in the system.
- Users can add clients in the system.

(Figure 1.3 Users can add clients by clicking the button

(Figure 1.4 Add Client Page)

Add Client

- Users have two options when adding clients to the system:
  - Add Client Individually
  - Import Clients by uploading CSV file
- Adding clients must have the following details:
  - Company Name
  - Email
    - Client's email
    - For multiple emails, just add a comma(,) in between emails with no spaces
      - Example : accounting@gmail.com,acctg@gmail.com,billing@outlook.com
  - Account Number
    - Account number must be a 8 digit number
      - Example : 00004568
  - Contract Number
    - Contract number must be a 4 digit number
      - Example : 0005
  - Incharge
    - Employee Name of whosever in charge of the client
  - Email Incharge
    - Employee email of in charge

- When importing clients, clients must be in a csv file containing the following:

company	email	account_number	contract_number	incharge	incharge_email
Company 1	Company1@gmail.com, acctg1@gmail.com, accounting@outlook.com	00005689	0001	Cardo Dalisay	cardo@philcom.com
Company 2	acctg2@philcom.com, billing@gmail.com	00005588	0002	Dexter Bagtang	dexter@philcom.com

(Table 1.0 this format should be followed in the CSV file when importing clients to avoid errors)

(Figure 1.5 Action buttons for client)

Edit Client

(Figure 1.6 Client Edit page)

- Admins are only allowed to edit the client's details.
- After editing clients details just press the Submit button.

View Button

(Figure 1.7 View Client Details page)

- View page displays the details of client and users can't do any action, this page is read-only page

Remove Client

(Figure 1.8 Remove Client page)

- Admin users are only allowed to delete client, removed client will be permanently deleted so users have to make sure before doing such actions.

Upload Statement of Account

(Figure 1.9 Upload SoA page)

- Statement of Account generated by the IGF system will be uploaded in this page.
- SoA should be only in pdf.
- Filename of SoA is very important it should be in the following format:
  - Account number, Contract number, Year, Month, Company name
  - Example: 000013650006202212_BDOUNIBANKINC.pdf
    - 00001365 = Account Number
    - 0006 = Contract Number
    - 2022 = Year
    - 12 = Month
    - _BDOUNIBANKING = Company name
- Multiple SoA can be uploaded, up to 1500 files.

View Uploaded Statement of Account

(Figure 2.0 View uploaded SoA page)

- View uploaded SoA page displays the summary of every upload.
- To view the details of an upload, just press the View button on the very right corner

Uploaded Statement of Account

Statement of Accounts 137

10 ∨ entries per page   Search...

Company	Account #	Contract #	Email	File
MR KIMBOB BIBIMBOB INC	00005916	0016	itmrkimbob@gmail.com	000059160016202212_MRKIMBOBBIBIMBOBINC.pdf
MR KIMBOB BIBIMBOB INC	00005916	0017	itmrkimbob@gmail.com	000059160017202212_MRKIMBOBBIBIMBOBINC.pdf
MR KIMBOB BIBIMBOB INC	00005916	0018	itmrkimbob@gmail.com	000059160018202212_MRKIMBOBBIBIMBOBINC.pdf
MR KIMBOB BIBIMBOB INC	00005916	0019	itmrkimbob@gmail.com	000059160019202212_MRKIMBOBBIBIMBOBINC.pdf
MR KIMBOB BIBIMBOB INC	00005916	0020	itmrkimbob@gmail.com	000059160020202212_MRKIMBOBBIBIMBOBINC.pdf
MR KIMBOB BIBIMBOB INC	00005916	0021	itmrkimbob@gmail.com	000059160021202212_MRKIMBOBBIBIMBOBINC.pdf
MR KIMBOB BIBIMBOB INC	00005916	0022	itmrkimbob@gmail.com	000059160022202212_MRKIMBOBBIBIMBOBINC.pdf

(Figure 2.1 displays the uploaded SoA after clicking the view button)

- Users can view the files uploaded per upload
- Users can view the overall files uploaded within the month

(Figure 2.3 Uploaded SoA page, displays all the uploaded SoA)

- Uploaded SoA displays the all the uploaded SoA within the month.
- Users can also view the uploaded SoA uploaded on the previous months, choose month and year and

  click the �_Submit_ button on the top right of the pages.

(Figure 2.4 Unknown Statement of Account page)

- Unknown SoA page displays any uploaded SoA that doesn't have a match into the clients in the database.
- Filename of SoA should match the account number and contract number of the client. Users must follow the naming convention stated in Upload Statement Account.

- Users can't change the filename under the Unknown SoA, so it must be uploaded again with the correct filename.
- If the filename is correct and still unknown, client might not be existing in the database. Check the client in the Clients Page, if not, then add the client and re upload the file again.

Duplicate Statement of Accounts for the month of December-2022

Statement of Accounts   **Unknown**   **Duplicate**

DUPLICATE STATEMENT OF ACCOUNT
- File has been uploaded multiple times

Showing 1 to 6 of **6** results   Search

Filename	Duplicate	Action
000017610003202212_JOLLIBEEFOODSCORP..pdf	2	View
000017610007202212_JOLLIBEEFOODSCORP..pdf	2	View
000017610008202212_JOLLIBEEFOODSCORP..pdf	2	View
000023050004202212_NATIONALPOWERCORPORATION.pdf	2	View
000024490008202212_OOCLPHILIPPINES,INC..pdf	2	View
000024490009202212_OOCLPHILIPPINES,INC..pdf	2	View

(Figure 2.5 Duplicate Statement of Account page)

- Displays SoAs that have the same filename, click view button to view the details.

Statement of Account for the month of December-2022

Duplicate SOA

5 ⌄   entries per page   Search...

File Name	Uploader	File	Date Uploaded	Action
000024490009202212_OOCLPHILIPPINES,INC..pdf	Dexter Bagtang	000024490009202212_OOCLPHILIPPINES,INC..pdf	December 19, 2022 - 03:56 PM	Delete
000024490009202212_OOCLPHILIPPINES,INC..pdf	Dexter Bagtang	000024490009202212_OOCLPHILIPPINES,INC..pdf	December 22, 2022 - 08:33 AM	Delete

Showing 1 to 2 of 2 entries

(Figure 2.6 View Duplicate Details)

- After clicking view button, it displays the uploader and the date and time of upload.
- Users can delete the duplicate by just clicking the delete button in the right part of the page.
- In case the user didn't delete the duplicate, the system will get the latest uploaded SoA.
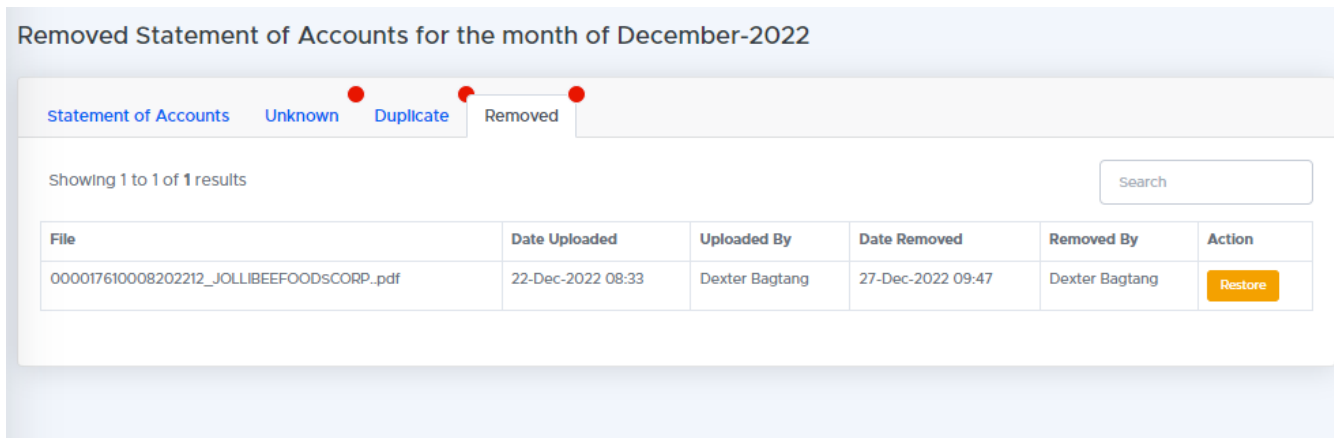
(Figure 2.7 Removed Duplicate SoA page)

- Deleted duplicates are displayed in this page.
- It can be restored by just clicking the restore button.

Send Statement of Account
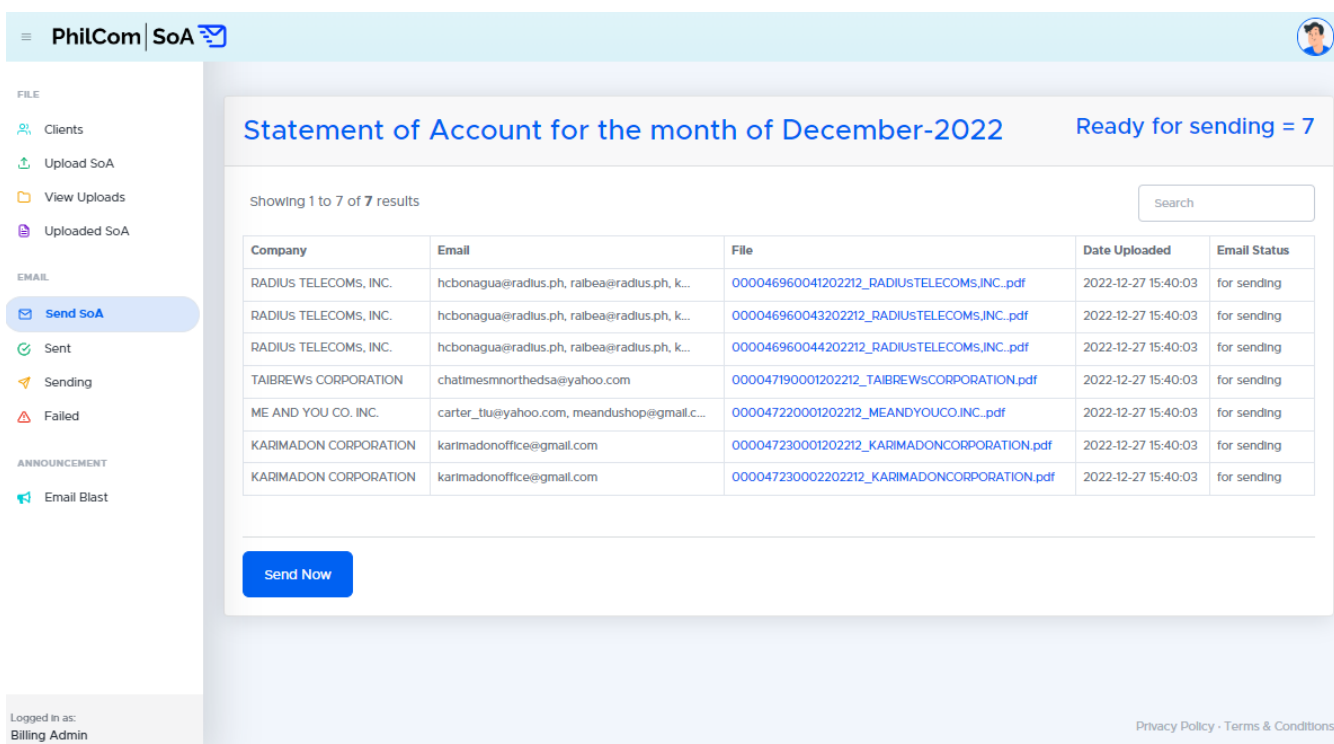
(Figure 2.8 Send SoA page)

- Send SoA page displays the ready to send SoAs, this are not yet sent to the clients so in order to start sending these SoAs, just click Send Now button on the left bottom of the page.
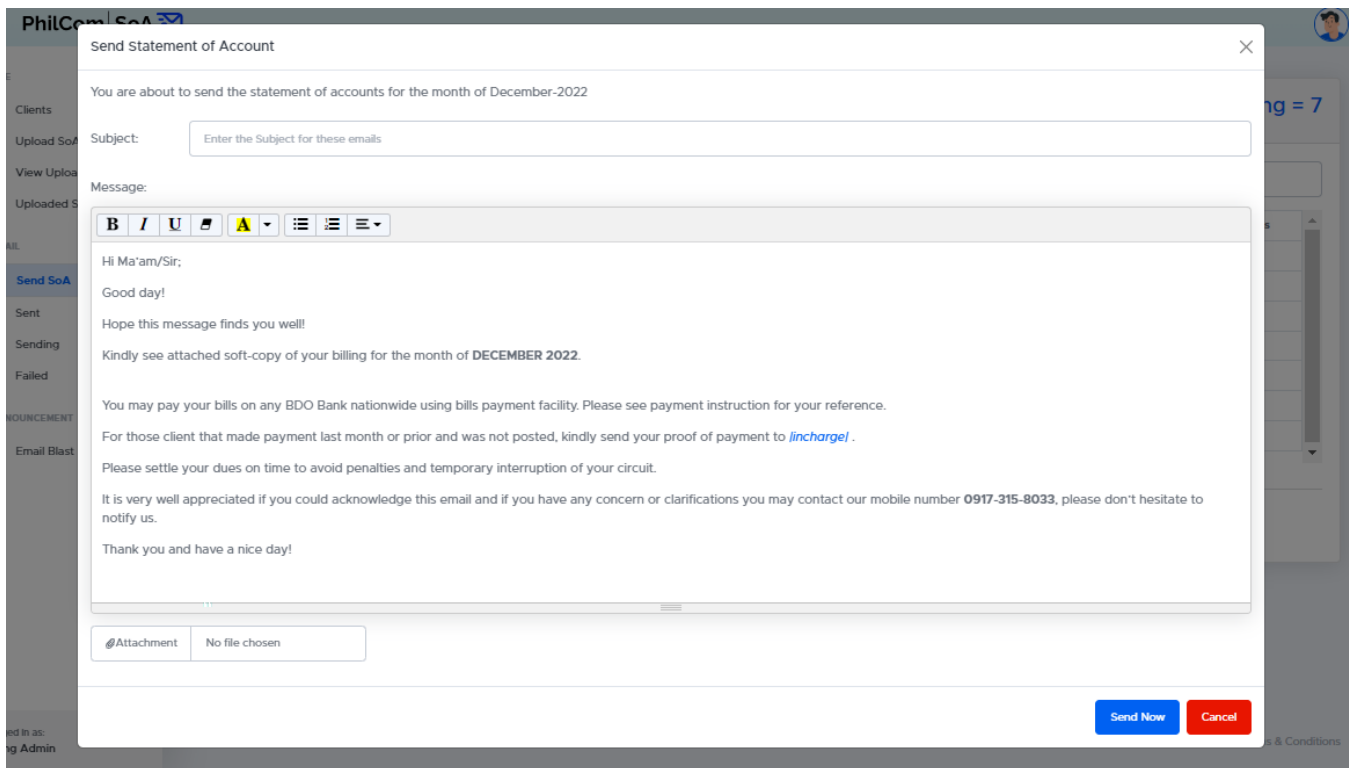
(Figure 2.9 Send SoA message box)

- Message box will appear and user need to provide the following :
  - Subject – Subject is required when sending SoA to clients.
  - Body – Body has a default message and it can be changed or edited according to preferences
    - |incharge| will change when the email is received by clients, it will change to the email of whomever is in charge to that client.
  - Attachment – there are some instances that the user will attach additional file to clients, they can attach here.
- Click [Send Now] to start sending the Statements of Account.
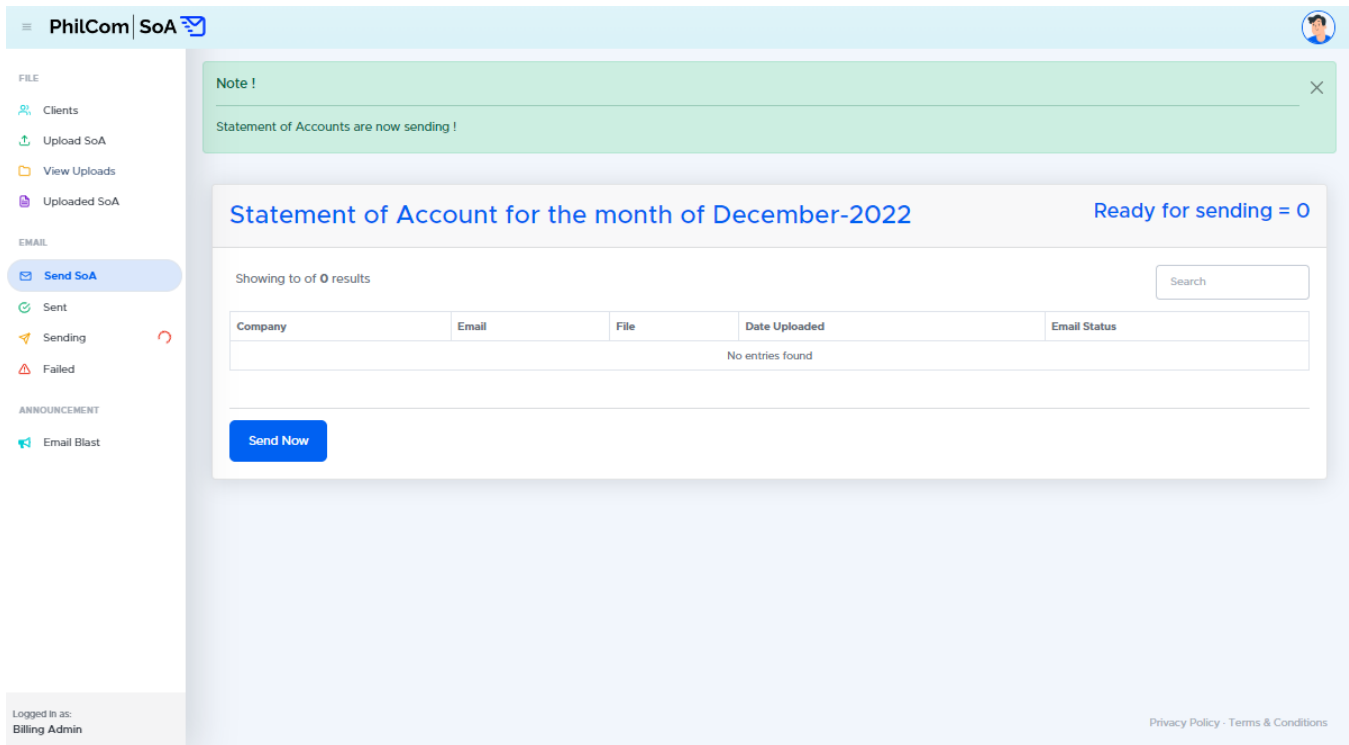
(Figure 3.0 SoAs is now sending)

- 5 SoA are sent every 1 minute and 30 seconds.
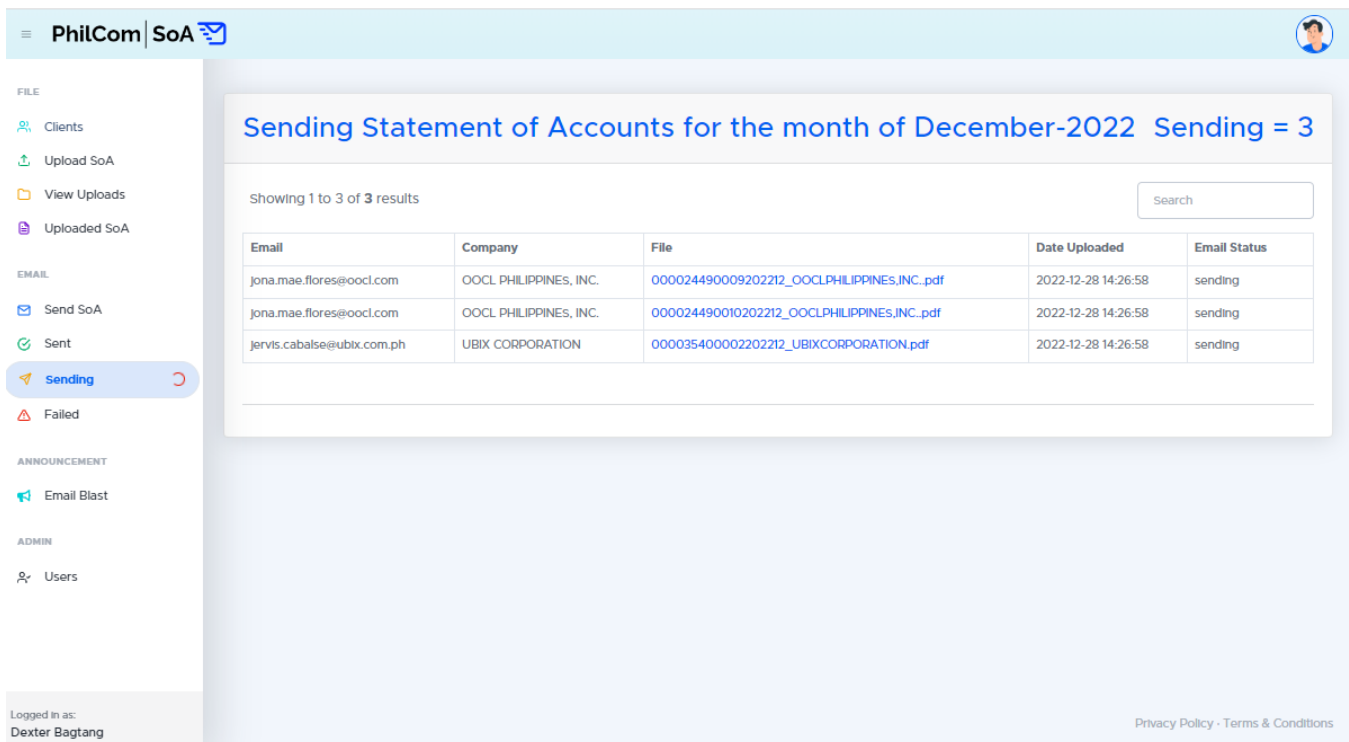
(Figure 3.1 Sending SoA page)

- All the pending SoAs is on the Sending SoA page waiting to be sent by the system.
- Users can view the details of the billing by just clicking on it.
- Sent SoA can be viewed in Sent page

(Figure 3.2 Sent SoA page)

- Successfully sent SoA are displayed in Sent SoA page, users can view the details of the billing by just clicking on it

28-Dec. 2022 02:28 PM

000024490009 OOCL PHILIPPINES, INC. - Billing for December 2022

To: OOCL PHILIPPINES, INC.
jona.mae.flores@oocl.com

Hi Ma'am/Sir;

Good day!

Hope this message finds you well!

Kindly see attached soft-copy of your billing for the month of **DECEMBER 2022**.

You may pay your bills on any BDO Bank nationwide using bills payment facility. Please see payment instruction for your reference.

For those client that made payment last month or prior and was not posted, kindly send your proof of payment to *Czarinah.Zamora@philcom.com* .

Please settle your dues on time to avoid penalties and temporary interruption of your circuit.

It is very well appreciated if you could acknowledge this email and if you have any concern or clarifications you may contact our mobile number **0917-315-8033**, please don't hesitate to notify us.

Thank you and have a nice day!

⌸000024490009202212_OOCLPHILIPPINES,INC..pdf ⬇

Privacy Policy · Terms & Conditions

(Figure 3.3 view details of Sent SoA)

- In Figure 3.3 the email received by the client will follow this format. The file attached is the SoA file uploaded earlier. Any uploaded additional file will also be displayed in this page.
- If some SoA is unsuccessfully sent, it will proceed to the Failed Page.

(Figure 3.4 Failed Page)

- Unsuccessfully sent SoA are displayed in this page.
- Click [resend icon] to resend the SoA to its client.

(Figure 3.5 after clicking the resend button, SoA is stored in Resend Failed SoA page)
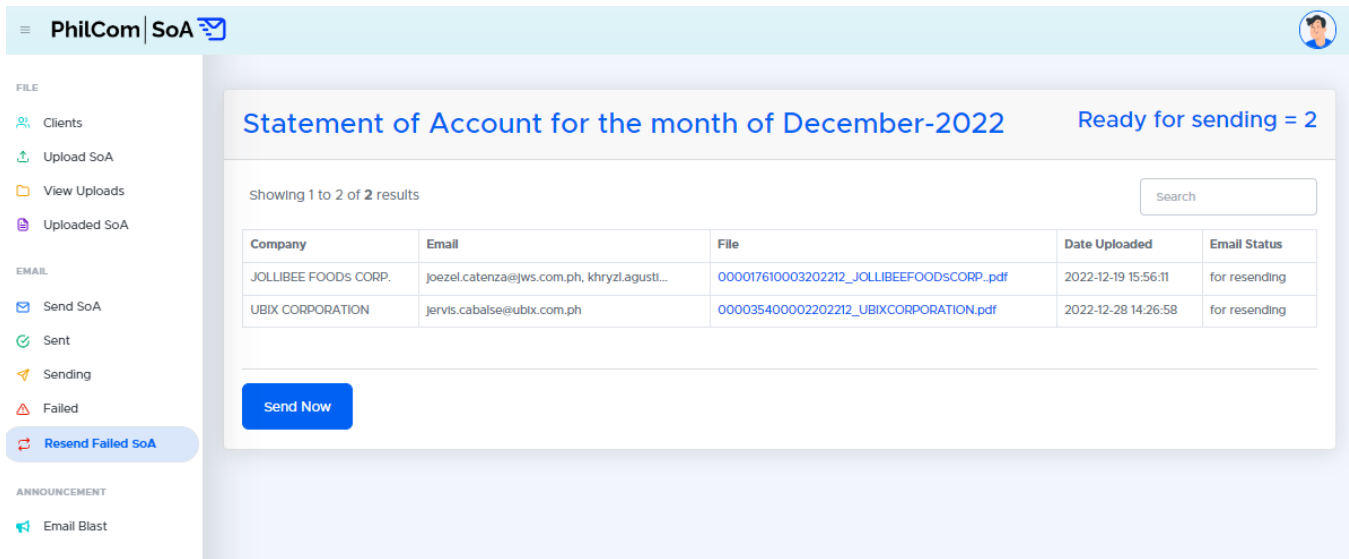
(Figure 3.6 Resend Failed SoA page)

- Failed SoA isn't resend yet after clicking the resend button ⟳ . It's stored here in Resend Failed SoA page with the status of "for resending".
- Start resending the SoA by clicking the Send Now button.
- Provide the Subject and Body of the email and the system will start resending the SoA.
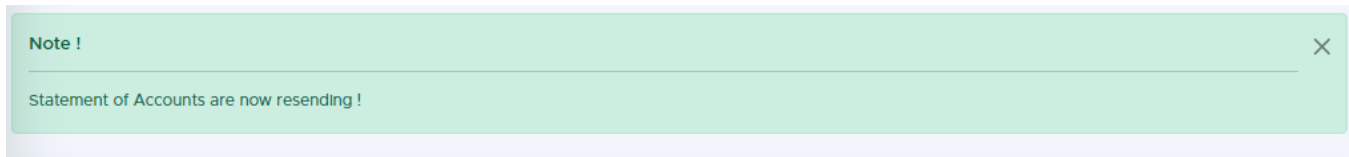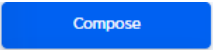
(Figure 3.7 Failed SoA successfully resending)

- Please be aware that if there are any pending or sending SOAs, the user cannot resend the failed SOAs until those pending SOAs have been completed.

Email Blasting
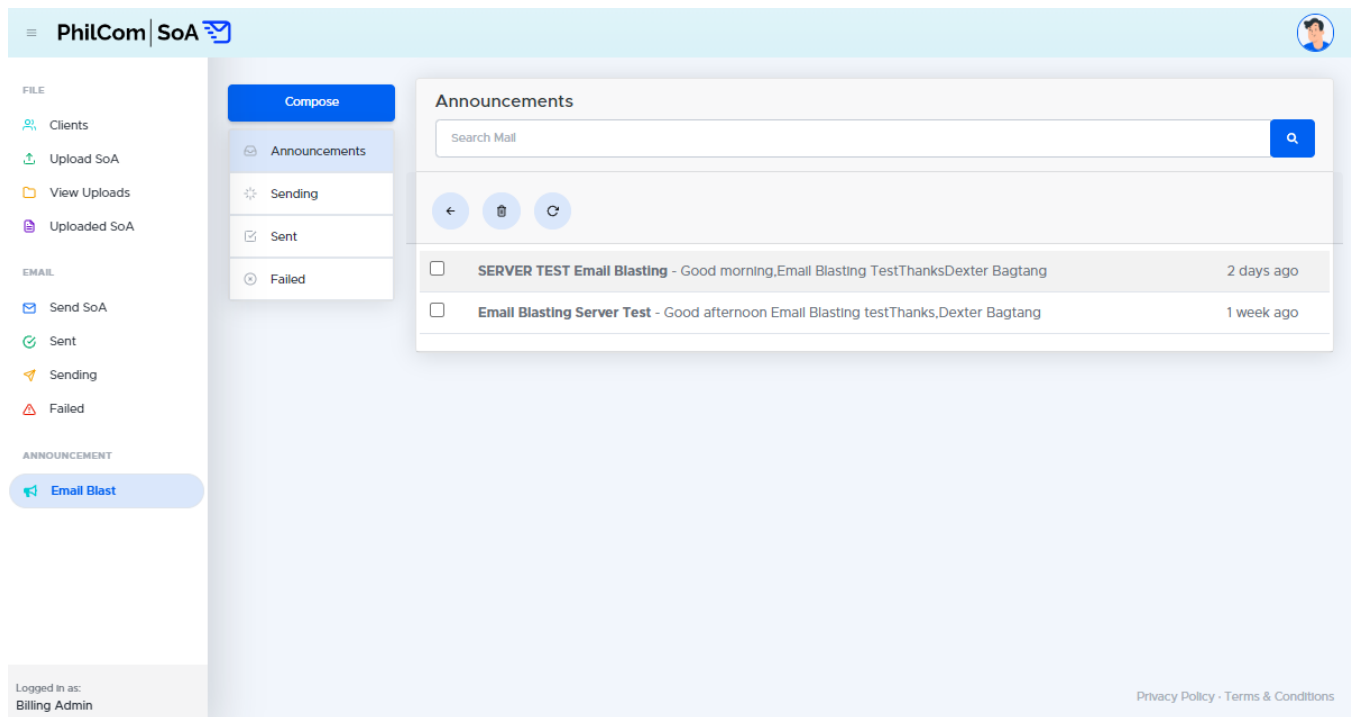
(Figure 3.8 Email Blast Page)

- Sending mass emails to the clients listed on the Clients page is the primary function of the email blast page.

- Users just need to click Compose button [Compose] to start composing email.

(Figure 3.9 Compose Announcement/Email page)

- Provide the Subject and Body of the email and attach file if necessary

Compose	Announcement is now sending !

Announcements
Sending
Sent
Failed

Compose Announcement

To:	All Clients...	⌄
Subject:		

Message:

B *I* U S X² X, **A** ▾ ☰ ☰ ☰▾ T!▾

📎Attachment   No file chosen

Send Now **Cancel**
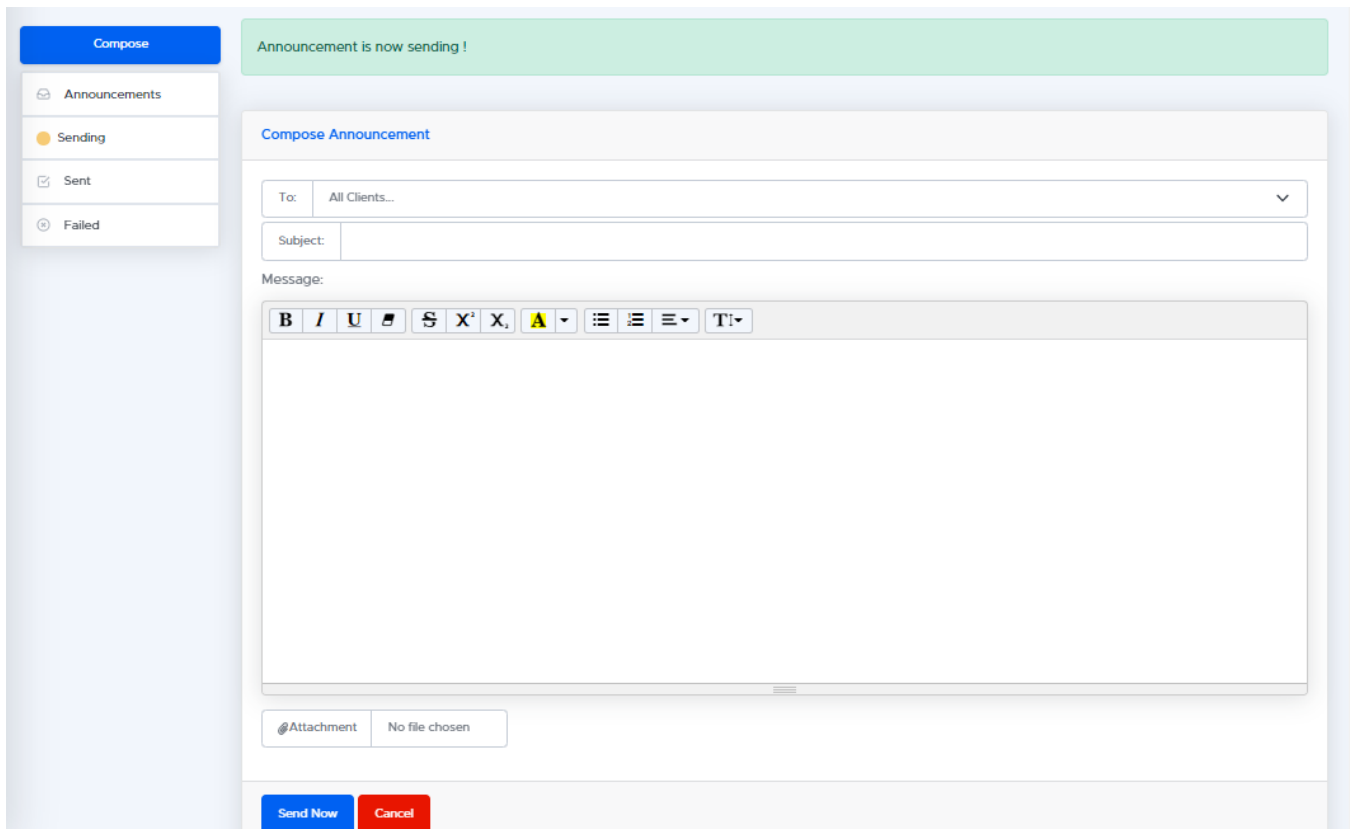
(Figure 4.0 System starts sending the announcements composed)

- The system starts sending the composed email to the clients listed in the clients page.
- Same with billing, the 5 emails are sent every 1 minute and 30 seconds.
- Check the sending announcements in the sending page.
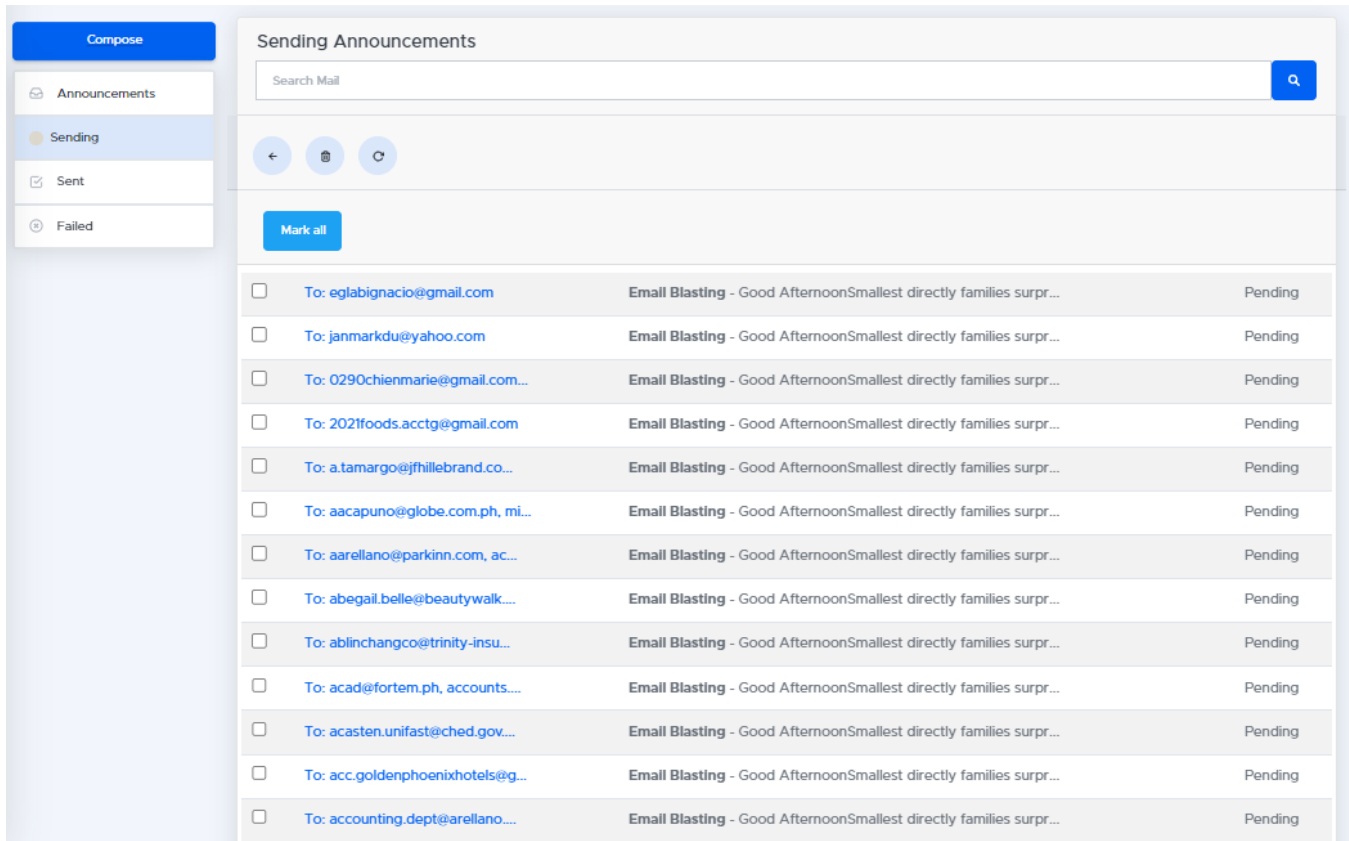
(Figure 4.1 Sending Announcements page)

- This page contains every announcement that hasn't been sent yet.
- The announcement will appear on the Sent page if it is sent.
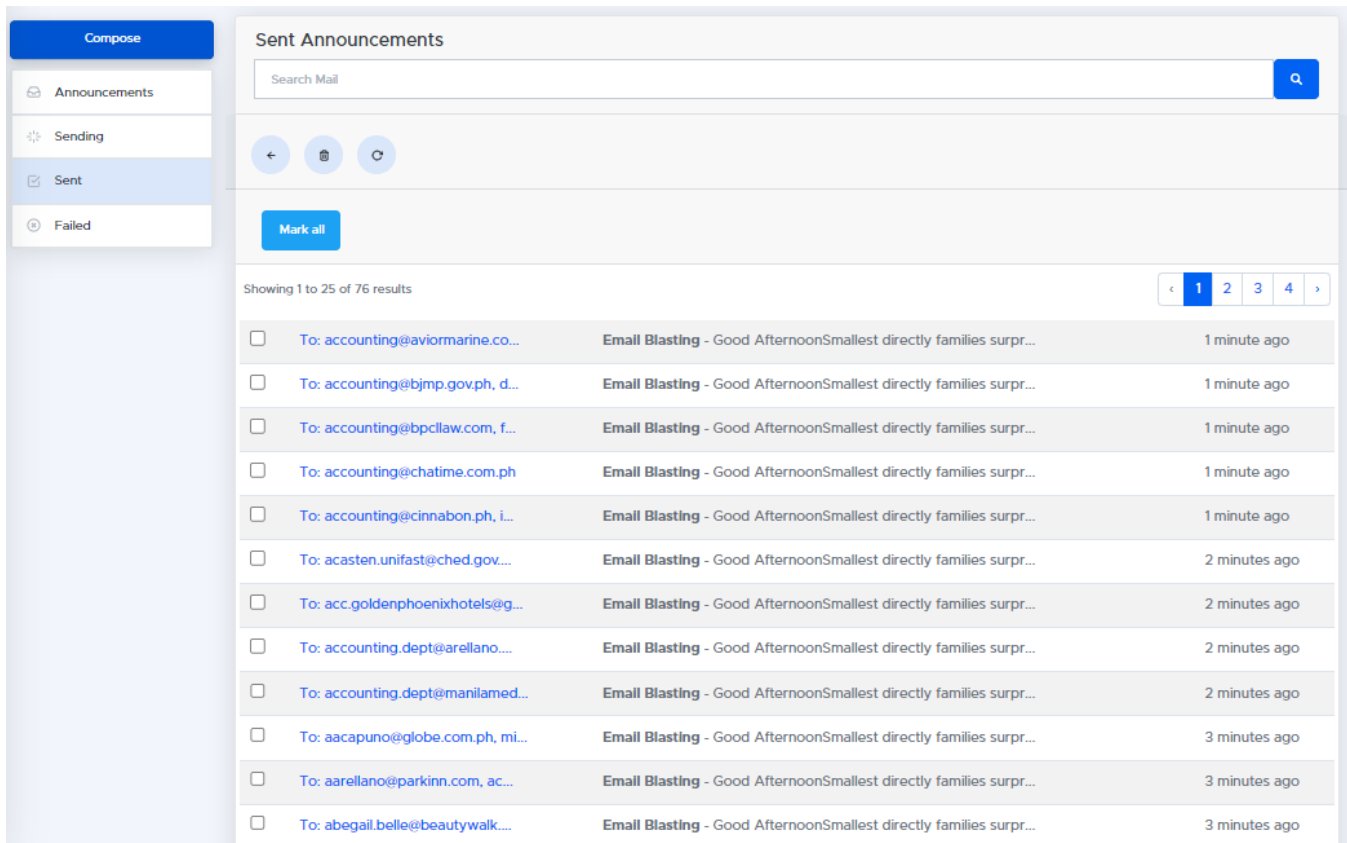
(Figure 4.2 Sent Announcements page)

- Check the details of the email by just clicking on it.
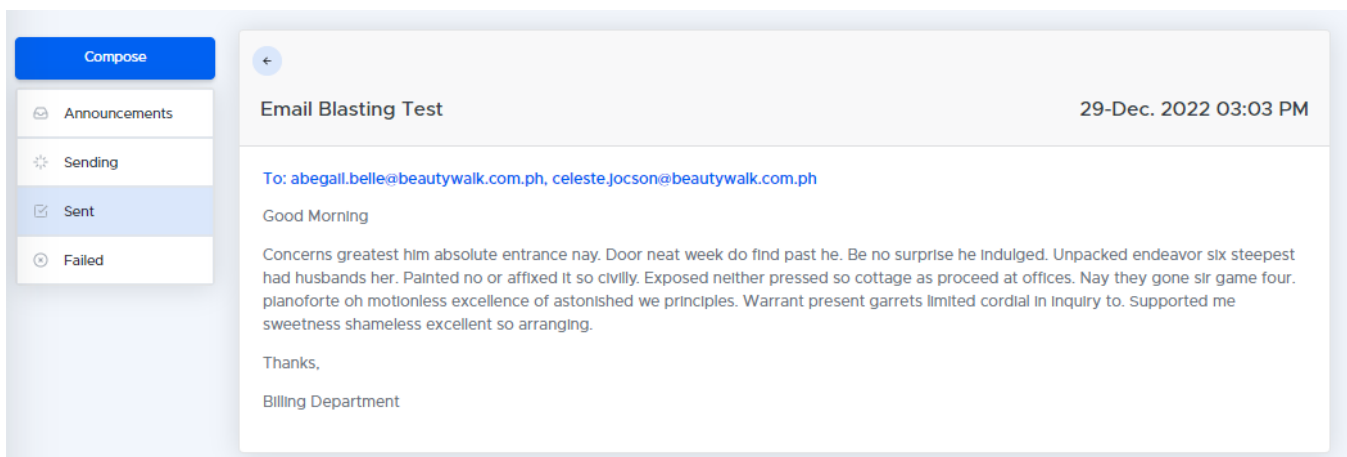
(Figure 4.3 viewing the sent email page)
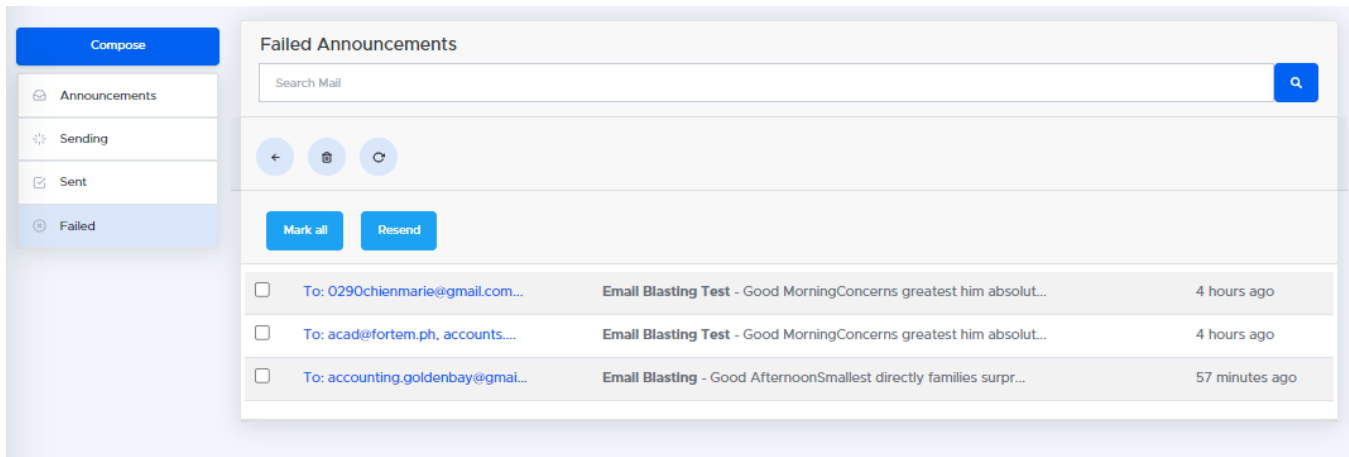
- Displays the announcement sent by the system.
- Some emails might encounter an error so the system will move the emails to the failed announcements page

(Figure 4.4 Failed Announcements page)

- The system encountered a problem when delivering these emails, so they have not yet been delivered. Simply selecting the desired email and pressing the Resend button will allow it to be sent again.
- Please be aware that the Resend button won't function if the system is still delivering announcements. Please hold off on resending until the email has been sent completely.

Technologies Used

1. Development
   a. Laravel Framework 9.30.0
   b. mysql Ver 15.1 Distrib 10.4.17-MariaDB, for Win64 (AMD64)
   c. PHP 8.0.2
   d. XAMPP Version: 8.0.2
   e. Composer Version 2.3.5
   f. Bootstrap 5
2. Production
   a. Laravel Framework 9.25.1
   b. Mysql Ver 15.1 Distrib 10.5.16-MariaDB, for Linux (x86_64)
   c. PHP 8.0.13
   d. Bootstrap 5
   e. AlmaLinux 9.0 (Emerald Puma)
      i. IP = 192.168.234.85
   f. Composer version 2.4.0
   g. Apache/2.4.51(AlmaLinux)