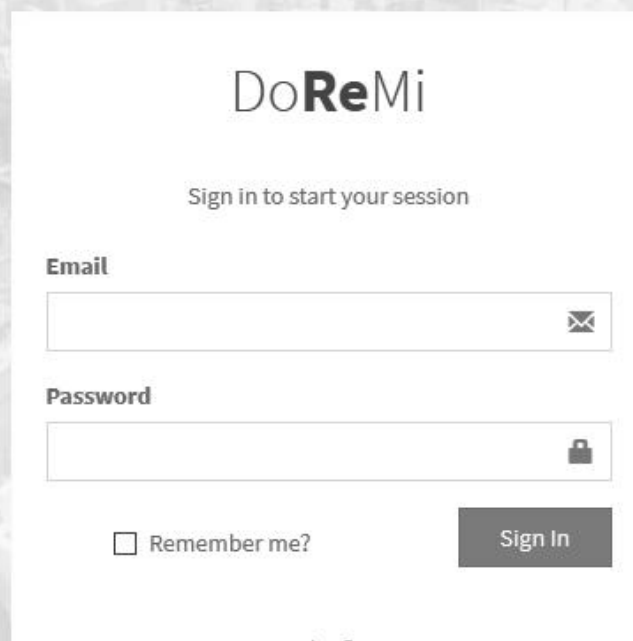


DoReMi

Online Order Management System (User Guide v1.3)



The image shows a login form for the DoReMi system. The form is white and centered over a background image of a warehouse with tall shelving units filled with boxes. The form contains the following elements:

- DoReMi** logo at the top.
- Text: "Sign in to start your session".
- Email** label above a text input field with an envelope icon on the right.
- Password** label above a text input field with a lock icon on the right.
- A checkbox labeled "Remember me?".
- A dark grey button labeled "Sign In".

[Sign in as a different user](#)

CONTENTS

How to Sign On to the system	2
Dashboard – Chart Summary	3
Customer Master	6
<i>EDIT AN EXISTING CUSTOMER RECORD</i>	7
<i>ADD A NEW CUSTOMER RECORD</i>	8
Add a New Sales Order	9
Event Logs	11
Change Password	12
Sales User – Confirms a Sales Order	13
Packing Team User – “Packing” Status	14
A Typical Event Log for a Standard Sales Order	15
When a Sales Order QTY Exceeds the Inventory Stock’s Balance	16
Key Contact Persons	17

DoReMi's Web URL link is :
<https://doremiwebapp.azurewebsites.net/>

Click the above hyper link to navigate to DoReMi's online order management system's sign-on web page.

Signing On

STEPS:

- 1) Enter your email address and click the **Sign In** button to proceed.
- 2) You will see the user profile screen if you are successfully signed on.

DoReMi

Sign in to start your session

Email

Password

☐ Remember me?

Sign In

Sign In Button

DoReMi

rogan@doremi.com

Rogan Beasley

Online

DASHBOARD

Dashboard Main

SALES

Customer Type

Customer

Sales Type

Sales Order

Shipment

Event Log

PURCHASE

Vendor Type

Vendor

User Profile

Drop files or click to upload

Browse

Email

rogan@doremi.com

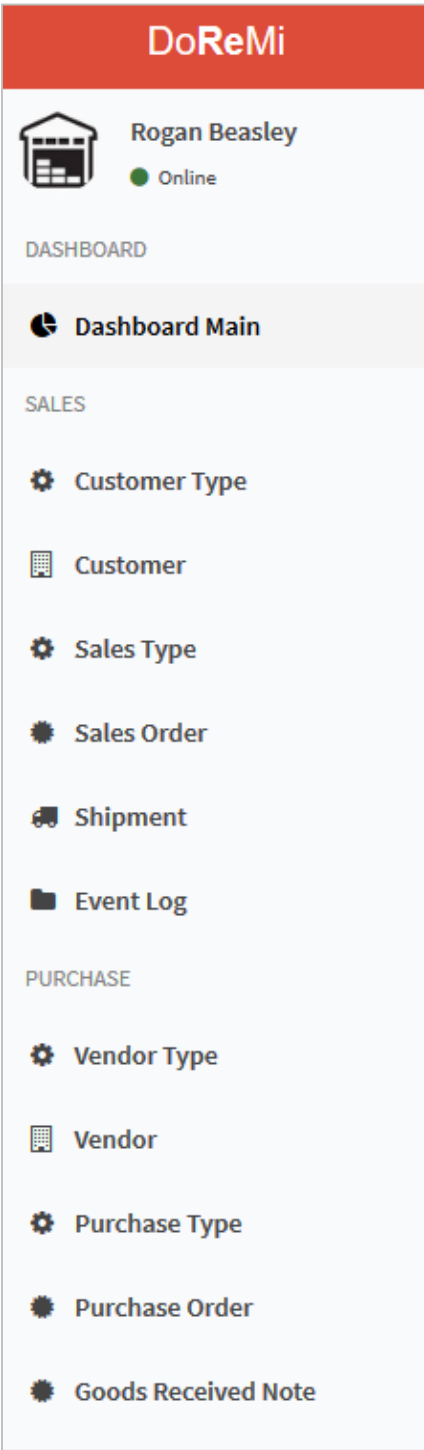
First Name

Rogan

Last Name

Beasley

Edit Profile



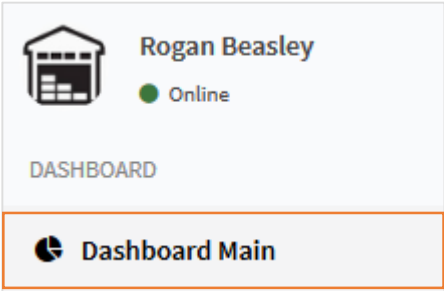
All users would have similar limited look and feel of the web user interface. However, each user will have access only to the features or functionality of the system based on what role there are assigned to.

On the left is a typical menu bar accessible to every user of the system.

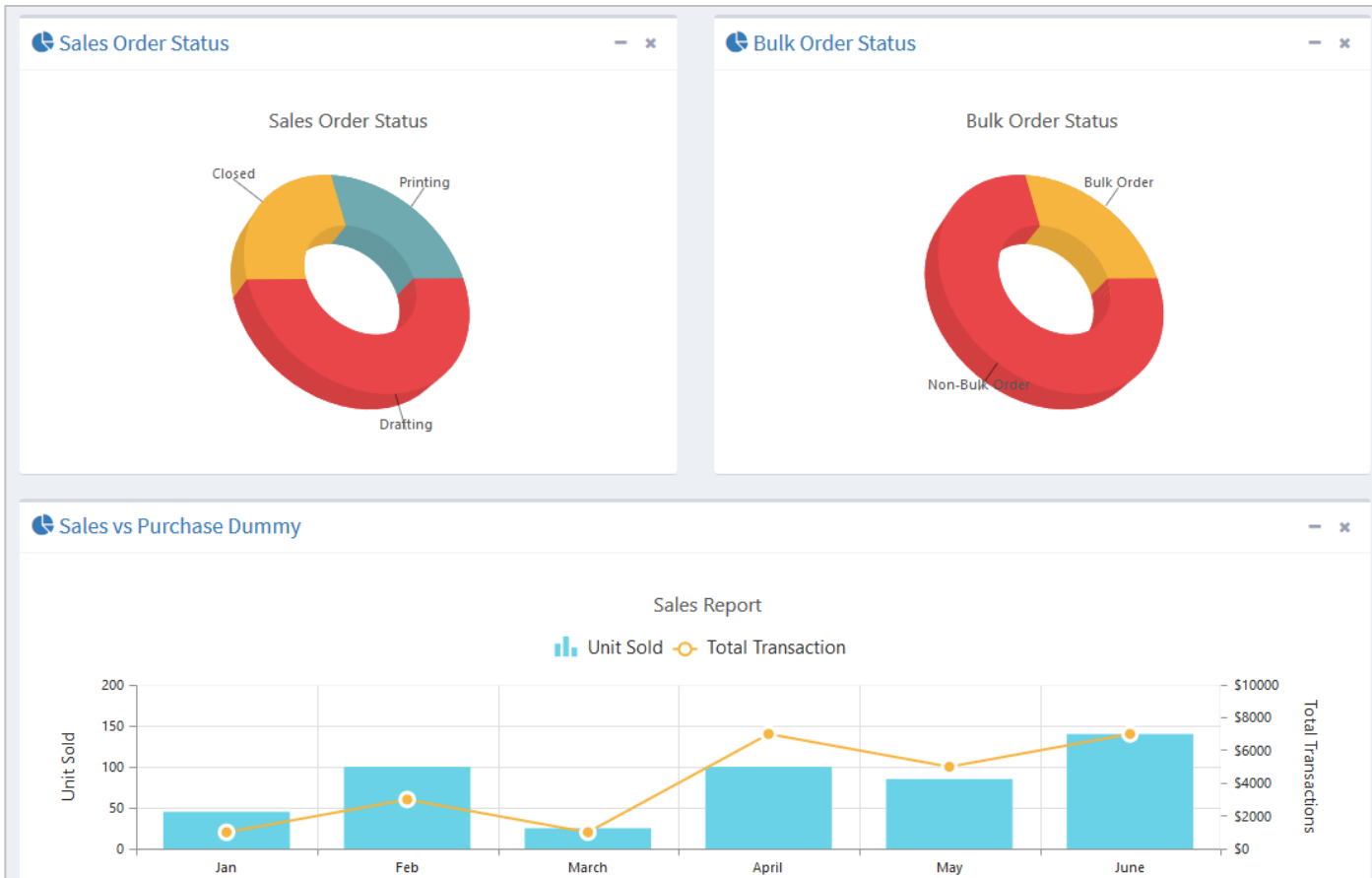
DASHBOARD

The Dashboard on DoReMi’s web system contains a summary graphical views of some common data information that is useful to sales, operations and finance teams.

To access the Dashboard, click the **Dashboard Main** link.



Dashboard Main Sample



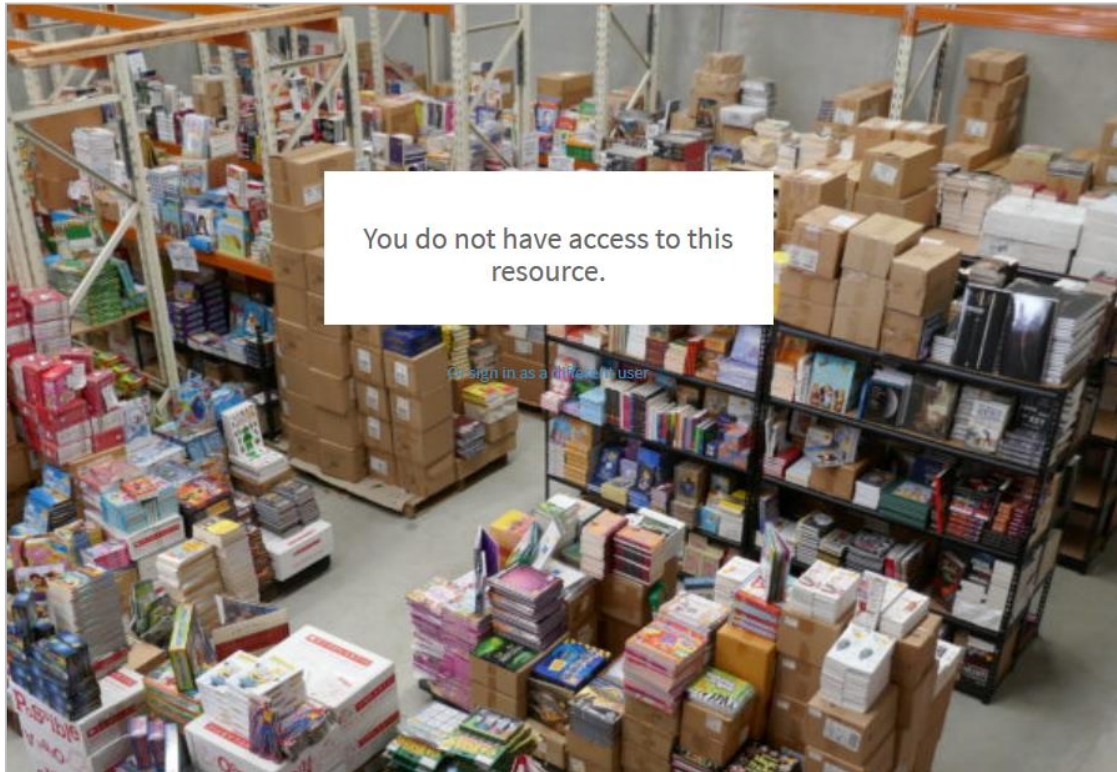
There are basically three key charts made available on DoReMi's Dashboard.

- 1) **Sales Order Status**
This provides a graphical indication of the number of orders in various statuses.
- 2) **Bulk Order Status**
This is a graphical indication of bulk order versus non-bulk orders.
- 3) **Sales versus Purchase (Dummy)**
- This is not yet implemented. Will be included in phase 2.

A user would not be able to view any functionality or feature that is not assigned to him or her. A message will be shown on the page indicating this. **See Below.**



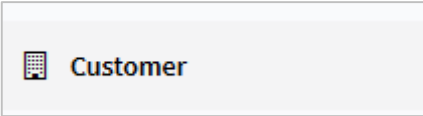
Click the Back button to get back to the normal menu view.





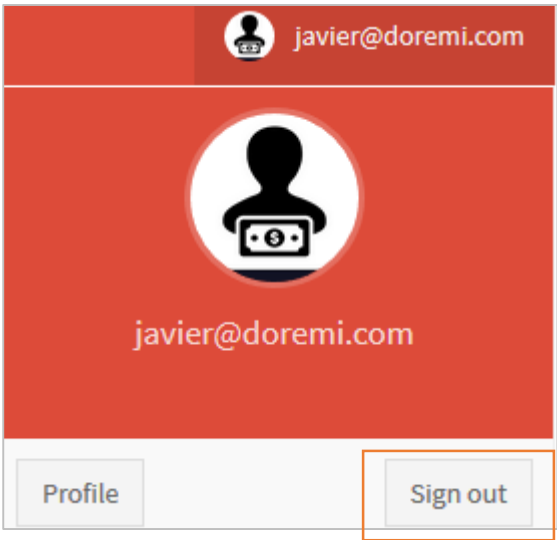
To Sign out from the System, Click the User Profile Icon and select **Sign Out** link.

CUSTOMER MASTER



The customer master contains the main customer account information data.

Only user that are assigned to maintain the customer master may add or update this records.



Sign Out Button

Customer										
Custo...	Custo...	Address	City	State	ZipCode	Phone	Email	CP	Voucher	
Hanari Carnes	Normal	Rua do Pa?o, 67					test0@gmail.co		0.94035058476	
Mère Paillarde	Normal	43 rue St. Laure					test17@gmail.co		0	
Maison Dewey	Normal	Rue Joseph-Ber					test16@gmail.co		0	
Magazzini Alime	Normal	Via Ludovico il M					test15@gmail.co		0	
Lonesome Pine	Normal	89 Chiaroscuro					test14@gmail.co		0	
LINO-Delicatese	Normal	Ave. 5 de Mayo					test13@gmail.co		0	
LILA-Supermerc	Normal	Carrera 52 con					test12@gmail.co		0	
Let's Stop N Sho	Normal	87 Polk St. Suite					test11@gmail.co		0	
Lehmans Mark	Normal	Magazinweg 7					test10@gmail.co		0	
Lazy K Kountry	Normal	12 Orchestra Te					test9@gmail.co		0	

1 of 2 pages (20 items)

Customer									
Custo...	Custo...	Address	City	State	ZipCode	Phone	Email	CP	Voucher
Hanari Carnes	Normal	Rua do Pa?o, 67					test0@gmail.co		0.94035058476
Mère Paillarde	Normal	43 rue St. Laure					test17@gmail.co		0

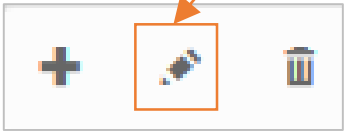
EDIT AN EXISTING CUSTOMER RECORD

To edit an existing customer record, select a record from the list of records on the customer master screen.

Click the pencil icon. A dialog pops up With the data fields that you may amend.

Make the changes required and click the Save **button** to save the changes.

Edit Button



The unique identifier for each customer record is the customer’s email address.



However, the system does have an internal customer number that is use for internal tracking purposes only.

Edit Record

Customer Name

Hanari Carnes

Customer Type

Normal

Address

Rua do Pa?o, 67

City

State

ZipCode

Phone

Email

test0@gmail.com

CP

Voucher

0.9403505847681

Save

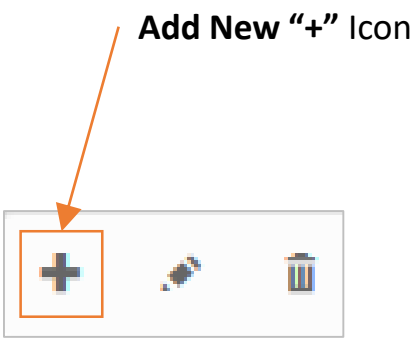
Cancel

ADD A NEW CUSTOMER RECORD

To add a new customer record, click the “+” icon on the top bar of the customer master listing.

Enter the required data into the customer form And click the **Save** button to update the record.

Click the **Cancel** button if you do not wish to save the record.



Save Button

Add New Record

Customer Name

Customer Type

Address

City

State

ZipCode

Phone

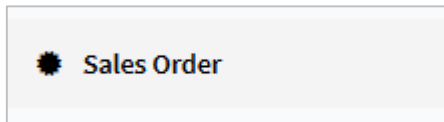
Email

CP

Voucher

Save

Cancel



Sales Order

Detail	SO#	Is Bulk Ord...	Customer	Order Date	Sales Type	Currency	OrderProg...
Detail	00004#SO	<input type="checkbox"/>	Hanari Carnes	03/06/2019	Mar 10%	USD	Closed
Detail	00005#SO	<input type="checkbox"/>	Maison Dewey	03/12/2019		USD	Drafting
Detail	00006#SO	<input type="checkbox"/>	Lonesome Pine Rest	03/13/2019		USD	Drafting
Detail	00007#SO	<input checked="" type="checkbox"/>	Lazy K Kountry Store	03/15/2019		USD	Printing

1 of 1 pages (4 items)

ADD A NEW SALES ORDER

A customer service representative or a sales person would be able to create a new sales order on DoReMi's online order management system.

To do this, select the Sales Order from the left menu bar and click on the “+” icon to start a new sales order.

Enter the require data into the fields provide as shown on the po-up dialog box (Right).



If the sales order is a bulk order, make sure you checked the “Is Bulk Order?” checkbox.

Make sure you select the customer this sales order is to be assigned to. The first status for a new sales order is always “Drafting”. The sales order number will be automatically assigned by the system.

Add New Record

Detail

Detail

SO#

Is Bulk Order?

☐

Customer

Order Date

Sales Type

Currency

USD

OrderProgressType

Drafting

Save

Cancel

Please note that creating a sales order consist of 2 steps process. After creating a parent record, you are required to add in products for the sales order.

This you will do so by select the “**Detail**” link that is shown on the parent record.

Sales Order

Detail	SO#	Is Bulk Ord...	Customer	Order Date
Detail	00008#SO	<input type="checkbox"/>	Let's Stop N Shop	03/21/2019

Sales Order Detail

Order Number

Customer

OrderDate

Currency

Sales Type

00008#SO

Let's Stop N Sh...

3/20/2019 4:00:00 PM +00:00

USD

Save Icon

Product	Qty	Price	Amount	Total
	1	0	0	0

First Book About The Orchestra

Franz Schubert : Four Symphonies

Johannes Brahms : The Complete Sonatas - Violin/Piano

Ludwig Van Beethoven : Complete Violin Sonatas

Schumann, Saint-Saens And Dvorak : Great Romantic Cello Concertos

1 of 1 pages (1 items)

SubTotal 0

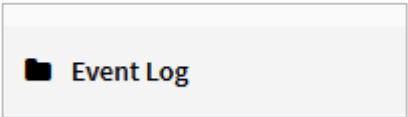
Total 0

To add a new product to a new sales order, click the “+” icon and enter the necessary data into the fields provided on the inline entry fields. Click the **Save** Icon to update the record. The selling price and total amount will be computed once the record is saved.

Page 10

EVENT LOGS

The system provides a quick and useful mean of checking all activities that were performed by different users for traceability and for audit purposes. A user may easily check his activity logs using the “Event Log” feature.



You may see a list of activities by selecting the Event Log item from the left menu bar.



Event	
<input type="text"/> 🔍 🖨️	
Time	Event Description
Sat Mar 09 2019 16:45:20 GMT+0800 (Singapore Standard Time)	00004#SO has been processed by AutoTopupVoucherRule
Sat Mar 09 2019 19:11:20 GMT+0800 (Singapore Standard Time)	00005#SO has been created by super@admin.com
Sat Mar 09 2019 19:11:41 GMT+0800 (Singapore Standard Time)	00006#SO has been created by super@admin.com
Sat Mar 09 2019 19:12:31 GMT+0800 (Singapore Standard Time)	00007#SO has been created by super@admin.com
Sat Mar 09 2019 19:12:45 GMT+0800 (Singapore Standard Time)	00007#SO has been updated from Drafting to Confirmed by super@admin.com
Sat Mar 09 2019 19:12:45 GMT+0800 (Singapore Standard Time)	00007#SO has been updated from Confirmed to Printing by BulkOrderRule
Sat Mar 09 2019 19:12:49 GMT+0800 (Singapore Standard Time)	00007#SO has been processed by BulkOrderRule
Sun Mar 10 2019 08:33:52 GMT+0800 (Singapore Standard Time)	00008#SO has been created by javier@doremi.com
<div>⏪ ⏩ 1 2 3 ⏪ ⏩ 3 of 3 pages (28 items)</div>	

CHANGE PASSWORD

Any user may conveniently change his / her account password by select the “Change Password” feature from the left menu bar shown on the right.

Select your account from the list of account below and click the “Edit icon” to proceed.

USER & ROLE

User

Change Password

Role

Change Role

Group

Change Password

Email	First Name	Last Name
super@admin.com	Super	Admin
rogan@doremi.com	Rogan	Beasley
javier@doremi.com	Javier	Lu
jiya@doremi.com	Jiya	Lane
abel@doremi.com	Abel	Williams

1 of 1 pages (5 items)

Enter your old password, new password in the fields Provided in the dialog box shown on the screen. Click The **Save** button update the changes.

Edit Password

Emailjavier@doremi.com

First NameJavierLast NameLu

Old Password

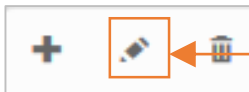
New PasswordRe-type Password

SaveCancel



A normal user may not access the (1) User, (2) Role, (3)Group or (4) Change Role features of the system. This can only be administered by the system administrator (Super User).

Sales Order							
<div> <div>+</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>							
Detail	SO#	Is Bulk Ord...	Customer	Order Date	Sales Type	Currency	OrderProg...
Detail	00004#SO	<input type="checkbox"/>	Hanari Carnes	03/06/2019	Mar 10%	USD	Closed
Detail	00005#SO	<input type="checkbox"/>	Maison Dewey	03/12/2019		USD	Drafting
Detail	00006#SO	<input type="checkbox"/>	Lonesome Pine Rest	03/13/2019		USD	Drafting
Detail	00007#SO	<input checked="" type="checkbox"/>	Lazy K Kountry Store	03/15/2019		USD	Printing
Detail	00008#SO	<input type="checkbox"/>	Let's Stop N Shop	03/21/2019		USD	Drafting



Edit Icon

SALES USER – CONFIRMS A SALES ORDER

A user in Sales department may confirm a new sales order by executing the following steps:

- 1) Select the Sales Order item on the left menu bar.
- 2) Click the **Edit** icon on the top menu of the sales order listing.
- 3) Choose “**Confirmed**” from the Order Progress Type drop down menu.
- 4) Click the **Save** button to update the changes.

Edit Sales Order

Detail

Detail

SO#

00008#SO

Is Bulk Order?

☐

Customer

Let's Stop N Shop

Order Date

03/21/2019

Sales Type

Currency

USD

OrderProgressType

Confirmed

Save

Drafting

Confirmed

Approved

Shipping

Closed



At this stage, the system's Rules Engine would be fired and checks if the stock's inventory has sufficient balance quantity to fulfil the quantity ordered for each product line item in the sales order. It will also check is discounts needs to be applied to the sales order and finally, check if the system can automatically approve the confirmed sales order based on the pre-set auto-approval limits of each customer.

If the order is **auto-approved**, an email notification would be sent to the packing team to start their process of packing the picked products from warehouse.

If the order is **NOT auto-approved**, an email notification would be sent to the Accounts department to follow up on credit risk checks on the sales order's customer.

If the customer's credit risk is cleared, the order gets approved and the process continues to the packing team in warehouse.

PACKING TEAM USER – “Packing” status

For any approved sales orders, the packing team is automatically informed via email.
A packing team user will need to access that sales order via the system and update it to the next status of **“Packing”**



Do note that when the rules engine execute the rules logic, it will execute some interim changes in the status updates before reaching the approved status.
That interim status is **“Balance Verified”**.

This MUST NOT be selected for updating a sales order’s status.

See flow chart diagram:
[Sales Order Transaction Process Flow Chart v2.0.pdf](#)
at git hub:

https://tinyurl.com/y667ucum/Sales_Order_Transaction_Process_Flow_Chart_v2.0.pdf

Once packing of products is completed by the packing team, the products /goods are ready for shipping. The packing team user updates the sales order status to **“Shipping”**.

Assuming that the shipment gets delivered to the customer. The logistic provider would proceed to update their tracking system and they would have an interface to our WEB API which then updates DoReMi’s system’s sales order status to **“Closed”**.

This completes a typical sales order cycle in DoReMi’s business work flow.

A TYPICAL EVENT LOG FOR A STANDARD SALES ORDER

In this user guide example which we use sales order number “00008”, you can see the sales order was check with “**BalanceCheckRule**” rule. It was then processed by the “**BestDiscountRule**” rule and the ordered quantity is verified by the “**AutoApprovedRule**” rule.

Subsequently, the order is automatically approved based on the “**SalesOrderAutoApproveRule**” Rule.

Sun Mar 10 2019 08:33:52 GMT+0800 (Singapore Standard Time)	00008#SO has been created by javier@doremi.com
Sun Mar 10 2019 11:05:38 GMT+0800 (Singapore Standard Time)	00008#SO has been updated from Drafting to Confirmed by javier@doremi.com
Sun Mar 10 2019 11:05:38 GMT+0800 (Singapore Standard Time)	00008#SO has been processed by BalanceCheckingRule
<div>⏮ ⏪ 1 2 3 4 ⏩ ⏭</div> <div>3 of 4 pages (34 items)</div>	

Event	
<div><input type="text"/> 🔍 🖨</div>	
Time	Event Description
Sun Mar 10 2019 11:05:38 GMT+0800 (Singapore Standard Time)	00008#SO has been processed by BestDiscountRule
Sun Mar 10 2019 11:05:38 GMT+0800 (Singapore Standard Time)	00008#SO has been updated from Balance Verified to Approved by AutoApproveRule
Sun Mar 10 2019 11:05:38 GMT+0800 (Singapore Standard Time)	00008#SO has been processed by SalesOrderAutoApproveRule
Sun Mar 10 2019 12:03:42 GMT+0800 (Singapore Standard Time)	00008#SO has been updated from Approved to Shipping by rogan@doremi.com
<div>⏮ ⏪ 1 2 3 4 ⏩ ⏭</div> <div>4 of 4 pages (34 items)</div>	

WHEN A SALES ORDER QUANTITY EXCEEDS THE INVENTORY STOCK’S BALANCE

In this simple example, we are looking at the sales order number “00005”. You can clearly see that the ordered quantity is 10,000 pcs. However, there is clearly insufficient quantity in the warehouse to fulfil this order.

As such, when the order was confirmed, the “BalanceCheckRule” rule executed its logic and cancelled the order and sent out an email to notify the sales and customer service teams. In this example, it is most likely a typing error that was entered into the quantity field.

This is just an example to high light how the rules are working in the system. Without the rules engine, the error could have potentially created unnecessary jobs for the packing team which means lost or revenue for DoReMi.

Events Log

Sun Mar 10 2019 12:19:17 GMT+0800 (Singapore Standard Time)	00005#SO has been updated from Drafting to Confirmed by javier@doremi.com
Sun Mar 10 2019 12:19:17 GMT+0800 (Singapore Standard Time)	00005#SO has been processed by BalanceCheckingRule
<div>⏪ ⏩ 1 2 3 4 ⏪ ⏩</div> <div>4 of 4 pages (36 items)</div>	

Sales order detail screen

Sales Order Detail

Order Number00005#SO

CustomerMaison Dewey

OrderDate3/11/2019 4:00:00 PM +00:00

CurrencyUSD

Sales Type

+				
Product	Qty	Price	Amount	Total
First Book About The Orchestra	10,000.00	23.19	231,900.00	231,900.00
<div>⏪ ⏩ 1 ⏪ ⏩</div> <div>1 of 1 pages (1 items)</div>				
SubTotal				231900
Total				231900

KEY CONTACT PERSONS

This user guide prepared by: DoReMi's IT Department (Jerry Jason)

For any enquiry on this guide, please contact Jerry at 451 76428 ext. 212, email: jerryj@doremi.com.

For any systems related support, please contact Tim Grey at 451 76429 ext. 213, email: ting@doremi.com.

For any enquiries on credit risks issues for cancelled orders, please contact the Account department and look for Jamie Lawson at 451 76420 ext. 106, email: jamiel@doremi.com.

For any matters related to packing, packaging, and shipping please contact the warehouse packing team at 451 76431 ext. 323, email: packingteam@doremi.com.