



My IDDEXHUB Customer Standard Operation Procedure

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Region Master

Objective

This SOP outlines the steps to manage regions within the MyIDEX HUB platform, including adding, editing, and deleting region entries.

Prerequisites

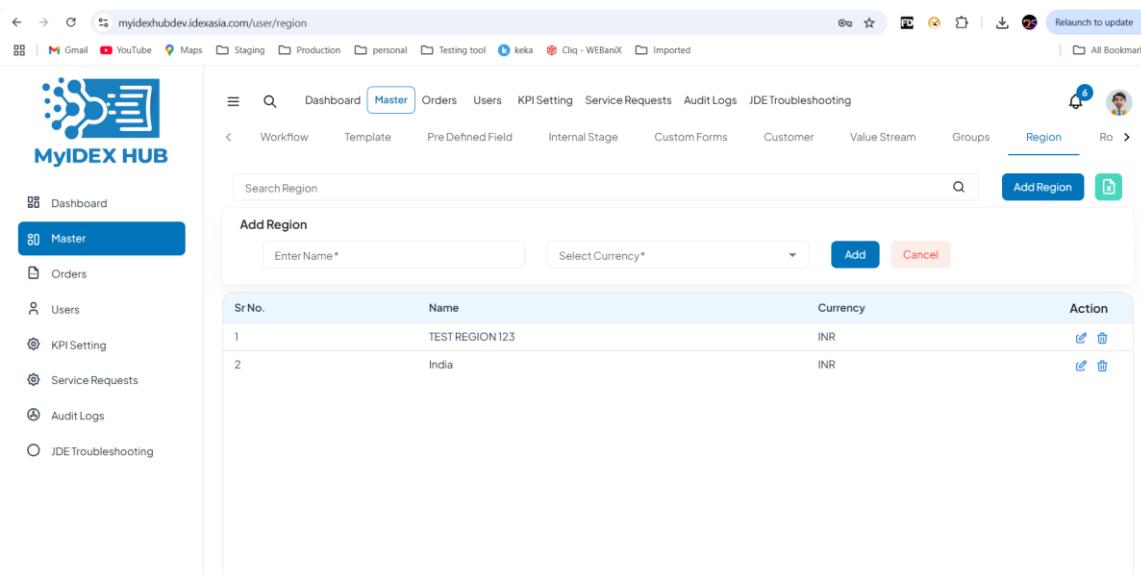
1. Valid login credentials for accessing the MyIDEX HUB platform.
2. Appropriate permissions to access and modify Region data under the 'Master' module.

Procedure

Follow the steps below to add a new region in MyIDEX HUB:

1. Navigate to the 'Master' tab on the left navigation menu.
2. Select the 'Region' sub-tab from the top menu.
3. Enter the desired region name in the 'Enter Name' field.
4. Select the currency from the 'Select Currency' dropdown.
5. Click the blue 'Add' button to save the new region.

Screenshot of Region Management Page:



Sr No.	Name	Currency	Action
1	TEST REGION123	INR	
2	India	INR	

Notes

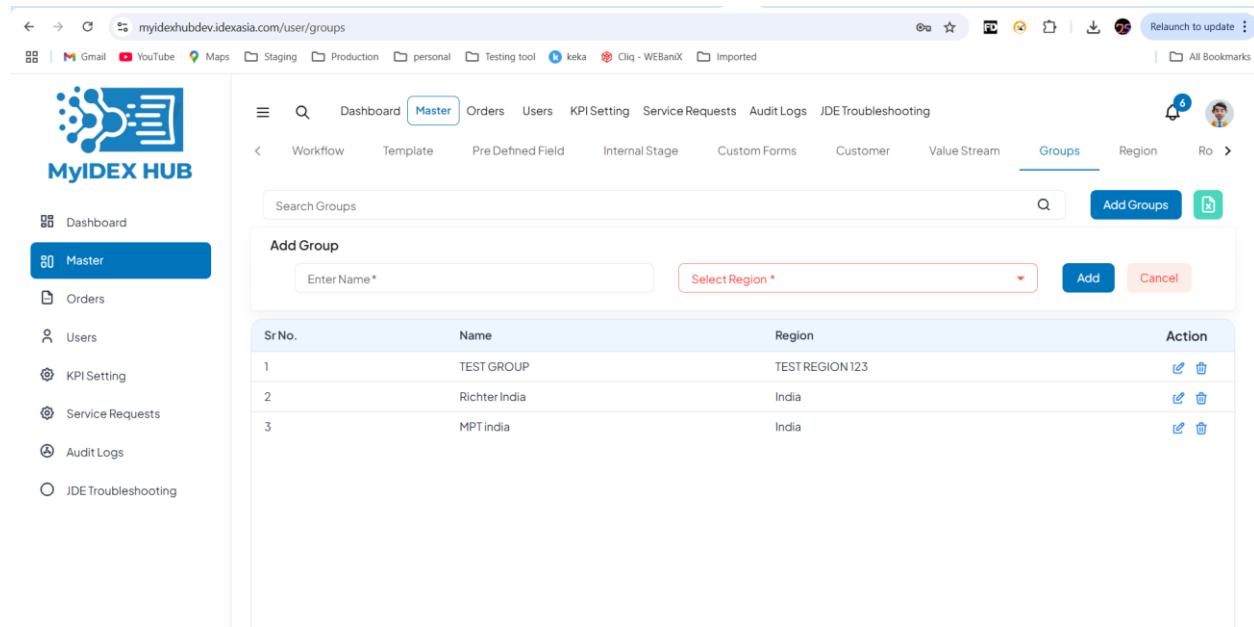
- To edit a region, click the pencil (edit) icon under the 'Action' column.
- To delete a region, click the trash bin icon under the 'Action' column.

Groups Master

This Standard Operating Procedure (SOP) document provides a step-by-step guide for managing Groups in the MyIDEX HUB portal. This includes adding, editing, and deleting Groups associated with various regions.

Step 1: Navigate to Groups Section

Login to the MyIDEX HUB portal. From the left-hand menu, click on 'Master'. Then select the 'Groups' tab from the top navigation bar.



Sr No.	Name	Region	Action
1	TEST GROUP	TEST REGION 123	
2	Richter India	India	
3	MPT India	India	

Step 2: Add a New Group

To add a new group, follow these steps:

1. Enter the Group Name in the 'Enter Name*' field.
2. Select the appropriate Region from the 'Select Region*' dropdown.
3. Click the 'Add' button to save the group.
4. The newly added group will appear in the list below.

Step 3: Edit or Delete a Group

To edit or delete an existing group:

1. Click the edit (pencil) icon next to the group you want to modify.
2. Make the necessary changes and click 'Update'.
3. To delete a group, click the delete (trash bin) icon.

Note: Deleting a group is irreversible and should be done with caution.

Value Streams (BU) Master

1. Objective

This Standard Operating Procedure (SOP) outlines the steps for managing and maintaining Value Streams in the MyIDEX HUB system. Value Streams help categorize and organize business units, their associated margin percentages, and related configuration.

2. Navigation to Value Stream

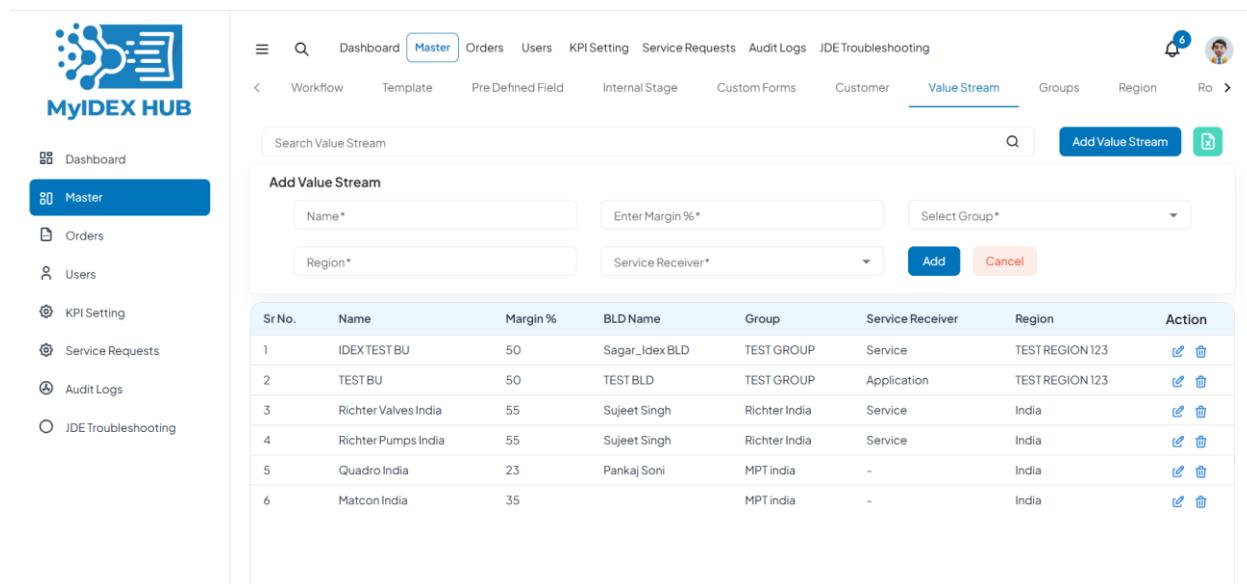
1. Login to MyIDEX HUB.
2. From the left-hand menu, click on 'Master'.
3. Navigate to the top navigation bar and click on 'Value Stream'.

3. Adding a New Value Stream

To add a new value stream:

1. Enter the Value Stream Name.
2. Enter the Margin %.
3. Select the Group from the dropdown.
4. Enter Region.
5. Select a Service Receiver from the dropdown.
6. Click on 'Add' to save the value stream.

Screenshot of 'Add Value Stream' Section:



Sr No.	Name	Margin %	BLD Name	Group	Service Receiver	Region	Action
1	IDEX TEST BU	50	Sagar_Idex BLD	TEST GROUP	Service	TEST REGION 123	
2	TEST BU	50	TEST BLD	TEST GROUP	Application	TEST REGION 123	
3	Richter Valves India	55	Sujeet Singh	Richter India	Service	India	
4	Richter Pumps India	55	Sujeet Singh	Richter India	Service	India	
5	Quadro India	23	Pankaj Soni	MPT india	-	India	
6	Matcon India	35		MPT india	-	India	

4. Editing or Deleting a Value Stream

Each row in the Value Stream table has action icons:

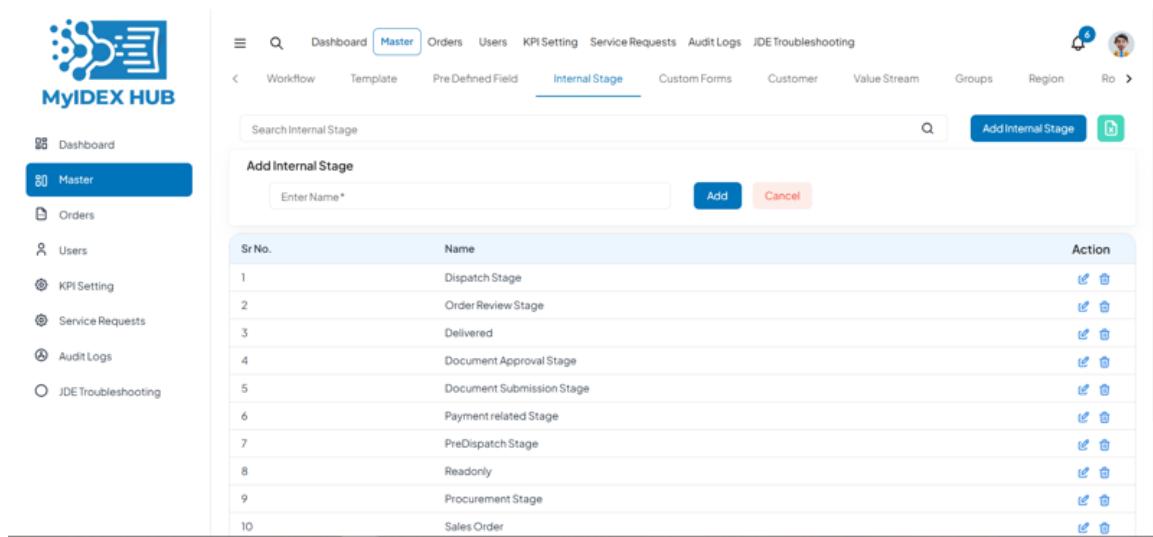
- Click the pencil icon to edit an entry.
- Click the trash icon to delete an entry.

Internal Stages Master

This Standard Operating Procedure (SOP) outlines the process of managing Internal Stages within the MyIDEX HUB platform. The steps below demonstrate how to access the Internal Stage settings, add new stages, and manage existing ones using the provided interface.

Step 1: Navigate to the Master Section

From the left sidebar, click on the 'Master' tab. This section provides various configuration options including Workflow, Template, Pre Defined Fields, and Internal Stage.



Sr No.	Name	Action
1	Dispatch Stage	
2	Order Review Stage	
3	Delivered	
4	Document Approval Stage	
5	Document Submission Stage	
6	Payment related Stage	
7	PreDispatch Stage	
8	Readonly	
9	Procurement Stage	
10	Sales Order	

Step 2: Access Internal Stage Tab

Click on the 'Internal Stage' tab at the top of the page. This tab allows users to manage stages that are used in different workflow processes within the system.

Step 3: Add a New Internal Stage

To add a new internal stage:

- Enter the stage name in the 'Enter Name' field.
- Click the blue 'Add' button to save the new stage.
- To cancel the action, click the 'Cancel' button.

Step 4: Manage Existing Stages

The list below the input field shows all existing internal stages. Each entry includes:

- A serial number.
- The stage name.
- Action buttons (Edit and Delete) on the right side.

You can click the pencil icon to edit a stage or the trash icon to delete it.

Payment Term Master

This document outlines the Standard Operating Procedure (SOP) for the Payment Term Master module. This module allows users to define and manage payment terms in two formats: Simple Payment Term and Milestone Payment Term. These configurations are crucial for controlling the payment schedule and planning for procurement or service engagements.

A. Simple Payment Term

The Simple Payment Term allows the user to define straightforward payment conditions that are not linked to project milestones. It typically includes basic terms like net due dates or percentages due upon invoicing.

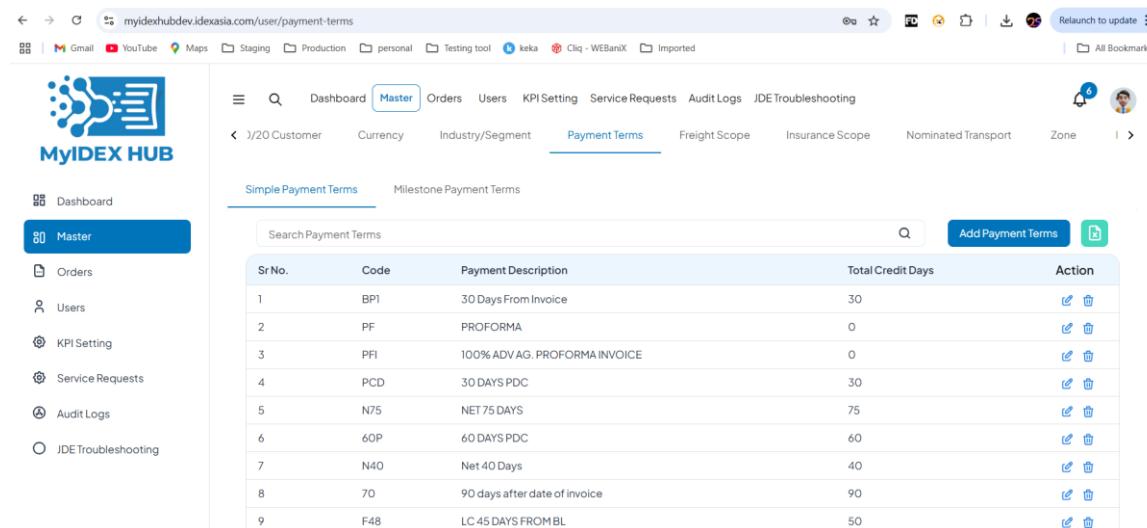
1. Navigation

To access the Payment Term Master module:

1. Login to MyIDEX HUB.
2. Navigate to the 'Master' section in the left navigation panel.
3. Click on 'Payment Terms' tab at the top.

2. Viewing Simple Payment Terms

The list of existing Simple Payment Terms is displayed under the 'Simple Payment Terms' tab. It shows details such as Code, Description, and Total Credit Days. You can edit or delete terms using the respective icons.



The screenshot shows the MyIDEX HUB web application. The left sidebar has a 'Master' section selected, which contains links for Orders, Users, KPI Setting, Service Requests, Audit Logs, and JDE Troubleshooting. The main content area has a header with tabs for Dashboard, Orders, Users, KPI Setting, Service Requests, Audit Logs, JDE Troubleshooting, and a notification icon. Below the header, there are two tabs: 'Simple Payment Terms' (selected) and 'Milestone Payment Terms'. A search bar and an 'Add Payment Terms' button are at the top of the table. The table lists nine payment terms with columns for Sr No., Code, Payment Description, Total Credit Days, and Action (edit and delete icons). The data is as follows:

Sr No.	Code	Payment Description	Total Credit Days	Action
1	BP1	30 Days From Invoice	30	
2	PF	PROFORMA	0	
3	PFI	100% ADV AG. PROFORMA INVOICE	0	
4	PCD	30 DAYS PDC	30	
5	N75	NET 75 DAYS	75	
6	60P	60 DAYS PDC	60	
7	N40	Net 40 Days	40	
8	70	90 days after date of invoice	90	
9	F48	LC 45 DAYS FROM BL	50	

3. Adding a New Payment Term

To add a new payment term:

1. Click on the 'Add Payment Terms' button.
2. Fill in the following details:
 - Payment Type: Select 'Simple Payment Term'
 - Payment Description: Provide a description (e.g., 30 Days From Invoice)
 - Code: Enter a unique code (e.g., BP1)

- Days: Enter the number of credit days (e.g., 30)

3. Click on the 'Add' button to save the term or 'Cancel' to abort the operation.

The screenshot shows the 'Payment Terms' section of the MyIDEX HUB interface. On the left, there's a sidebar with links to Dashboard, Master, Orders, Users, KPI Setting, Service Requests, Audit Logs, and JDE Troubleshooting. The main area has tabs for Customer, Currency, Industry/Segment, Payment Terms, Freight Scope, Insurance Scope, Nominated Transport, Zone, and Product Family. The 'Payment Terms' tab is selected. A form is open for adding a new payment term, with fields for 'Payment Type' (set to 'Simple Payment Term'), 'Payment Description', 'Code', and 'Days'. Below the form are 'Add' and 'Cancel' buttons.

B. Milestone Payment Term

The Milestone Payment Term allows users to define payments based on the achievement of predefined milestones. This is commonly used in projects where payments are released upon completion of specific deliverables or phases.

1. Accessing the Payment Terms Page

Follow these steps to navigate to the Payment Terms section:

- Step 1: Log into the MYIDEX HUB system.
- Step 2: Click on the 'Master' tab on the top menu.
- Step 3: Select 'Payment Terms' from the options.

The screenshot shows the 'Payment Terms' section of the MyIDEX HUB interface. The 'Master' tab is selected in the top navigation bar. The main area displays a table of existing payment terms under the 'Milestone Payment Terms' tab. The table columns include Sr No., Code, Payment Description, and various milestone percentages and days. The last two columns show Total Credit Days and Action buttons. At the bottom right of the table, there are 'Add Payment Terms' and 'Print' buttons.

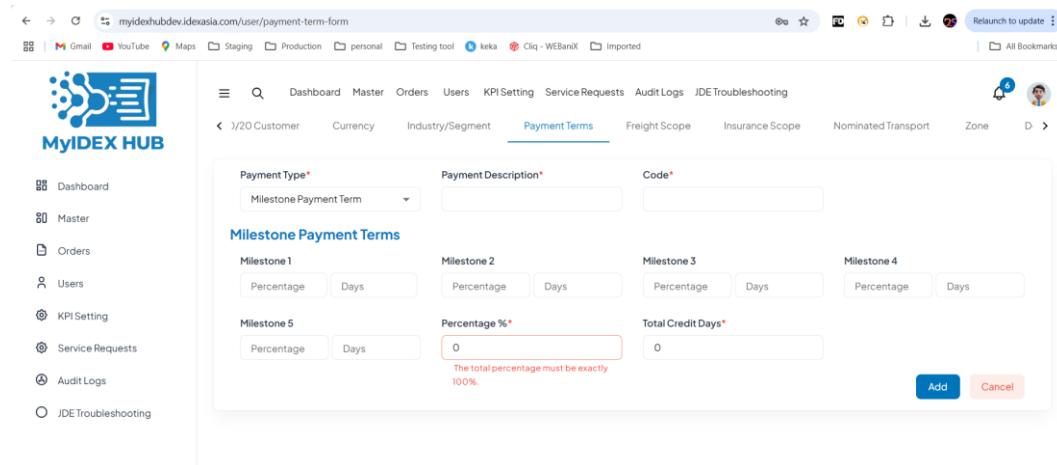
Sr No.	Code	Payment Description	Milestone 1		Milestone 2		Milestone 3		Milestone 4		Milestone 5		Percentage	Total Credit Days	Action
			Percentage	Day	Percentage	Day	Percentage	Day	Percentage	Day					
1	F92	10%ADV 85%AG SBLCN 90.5%DOCN90	10%	0	85%	90	5%	90	-	-	-	-	100%	180	
2	F88	10%ADV/10%MAT75%DIS5%DOC SUBMIT	10%	0	10%	0	75%	0	5%	0	-	-	100%	0	
3	B20	20%ADV/10%PF110%PBG	20%	0	70%	0	10%	15	-	-	-	-	100%	15	
4	P90	90% AG PROF INV & 10% AG PBG	90%	0	10%	15	-	-	-	-	-	-	100%	15	
5	F76	15%AGABGN3075%DISPN3010%PBGN15	15%	30	75%	30	10%	15	-	-	-	-	100%	75	
6	S31	35%INV ACC20%N30.15%AG INV5%SI(I&C)	35%	0	20%	30	15%	0	5%	30	25%	0	100%	60	
7	S22	50%ADV/50%on Inv Recpt.	50%	0	50%	60	-	-	-	-	-	-	100%	60	
8	F26	30%ADV 70% 15 DAYS PDC	30%	0	70%	15	-	-	-	-	-	-	100%	15	
9	F39	20%ADV 70%AG PF1 & 10% I&C N30	35%	0	35%	0	10%	30	10%	12	10%	34	100%	30	
10	S47	20%ADV 70%DEL100 10%I&C 45DAYS	20%	0	70%	10	10%	35	-	-	-	-	100%	45	

2. Adding a New Milestone Payment Term

4. Step 1: Click on the 'Add Payment Terms' button on the top right.
5. Step 2: Fill in the required details in the Milestone Payment Term form:

- - Payment Type
- - Payment Description
- - Code
- - Milestone Percentages and Days
- - Total Percentage must be exactly 100%
- - Total Credit Days

6. Step 3: Click on the 'Add' button to save the new payment term.



The screenshot shows the 'Payment Terms' section of the MyIDEX HUB interface. The 'Payment Type*' dropdown is set to 'Milestone Payment Term'. The 'Payment Description*' and 'Code*' fields are empty. Below these, there are five sections for 'Milestone Payment Terms'. Each section has two input fields: 'Percentage' and 'Days'. The fifth section also includes a 'Percentage %*' field with a value of '0'. A validation message 'The total percentage must be exactly 100%.' is displayed below this field. At the bottom right of the form are 'Add' and 'Cancel' buttons.

80/20 Product Master

This Standard Operating Procedure (SOP) provides steps for managing 80/20 Product data in the MyIDEX HUB platform. It includes the process for adding, editing, and deleting entries in the 80/20 Product section under the Master module.

Accessing 80/20 Product Page

Navigate to the 'Master' section in the left-hand menu and select the '80/20 Product' tab on the top menu. This page allows the user to manage the list of 80/20 product entries.

Sr No.	Name	Action
1	20	
2	80	

Steps to Add a New 80/20 Product

1. In the 'Add 80/20 Product' section, enter the name of the product (e.g., '80' or '20').
2. Click the 'Add' button to save the new entry.
3. The new entry will appear in the table below with an auto-generated serial number.

Steps to Edit an Existing Entry

1. Click the pencil (edit) icon in the 'Action' column for the entry you wish to update.
2. Modify the name as needed in the text field.
3. Click the 'Update' button to save changes.

Steps to Delete an Entry

1. Click the trash bin (delete) icon in the 'Action' column for the respective entry.
2. Confirm deletion if prompted. The entry will be removed from the list.

80/20 Customer Master

Module: 80/20 Customer Master Management

This SOP outlines the procedure to add or manage entries in the 80/20 Customer Master within the MyIDEX HUB application. The 80/20 classification helps in customer segmentation based on the Pareto principle, commonly used for prioritizing business efforts.

Steps to Add or Manage 80/20 Customer:

7. Login to the MyIDEX HUB application.
8. Navigate to the 'Master' section from the left sidebar menu.
9. Click on the '80/20 Customer' tab at the top navigation.
10. Use the 'Enter Name' field to input the name or classification (e.g., 20 or 80).
11. Click on the 'Add' button to save the entry.
12. To edit or delete an existing entry, use the respective icons under the 'Action' column.
13. Use the search bar to find specific entries quickly.

Screenshot:

Sr No.	Name	Action
1	20	
2	80	

Application Master

This Standard Operating Procedure (SOP) provides steps for managing Application data in the MyIDEX HUB platform. It includes the process for adding, editing, and deleting entries in the Application section under the Master module.

Step 1: Navigate to Application Section

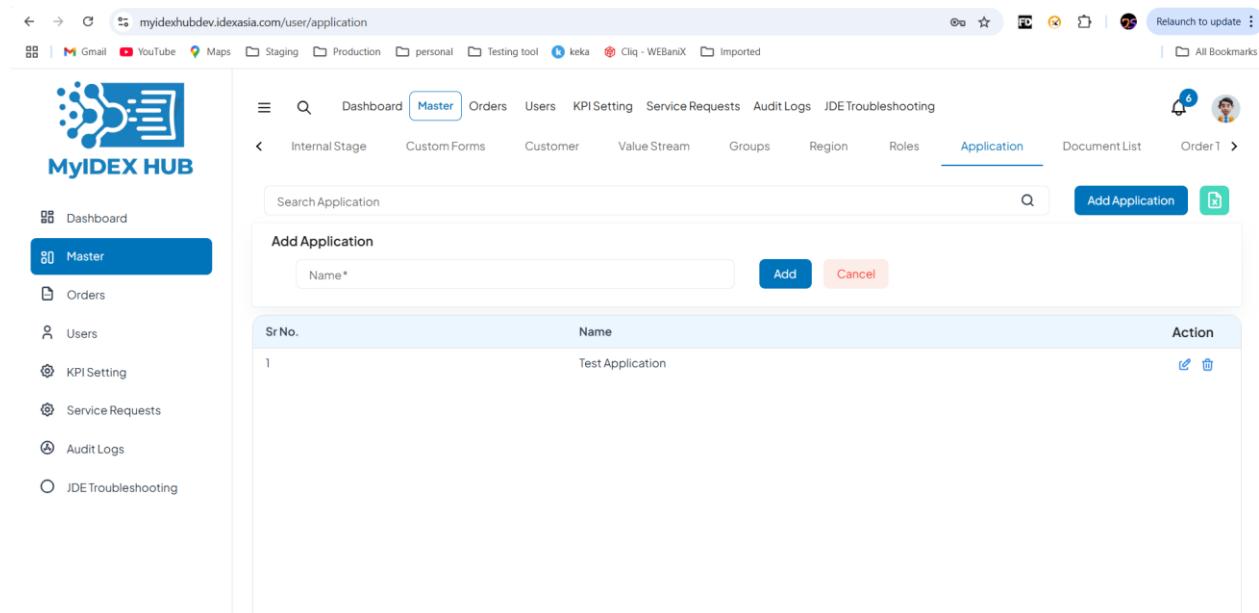
From the dashboard, go to the 'Master' section on the left-hand menu. Then select 'Application' from the top navigation bar.

Step 2: Add Application

To add a new application, enter the application name in the 'Name' field under the 'Add Application' section. Click the blue 'Add' button to save it. Use the 'Cancel' button to discard the action.

Step 3: View, Edit, or Delete Application

Below the form, the existing applications are listed with options to edit or delete using the icons under the 'Action' column.



Sr No.	Name	Action
1	Test Application	

Screenshot: Application Management Interface

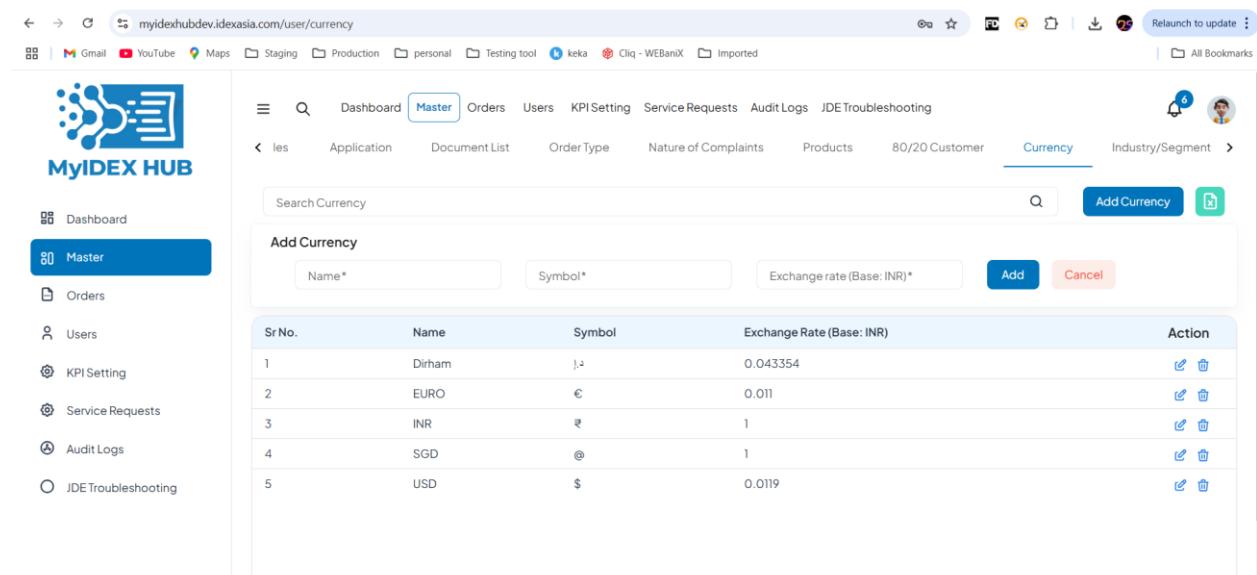
Currency Master

This Standard Operating Procedure (SOP) provides step-by-step instructions for managing Currency Master in the MyIDEX HUB application. The Currency Master allows the user to define various currencies with their corresponding symbols and exchange rates against the base currency (INR).

Steps to Manage Currency Master

1. Navigate to the Master section in the left-hand menu.
2. Click on the 'Currency' tab from the top navigation bar.
3. To add a new currency:
 - a. Enter the currency Name in the 'Name*' field.
 - b. Enter the corresponding Symbol in the 'Symbol*' field.
 - c. Enter the Exchange Rate (Base: INR) in the corresponding field.
 - d. Click the 'Add' button to save the new currency.
4. To edit or delete an existing currency, use the respective icons under the 'Action' column.

Screenshot



Sr No.	Name	Symbol	Exchange Rate (Base: INR)	Action
1	Dirham	JD	0.043354	
2	EURO	€	0.011	
3	INR	₹	1	
4	SGD	@	1	
5	USD	\$	0.0119	

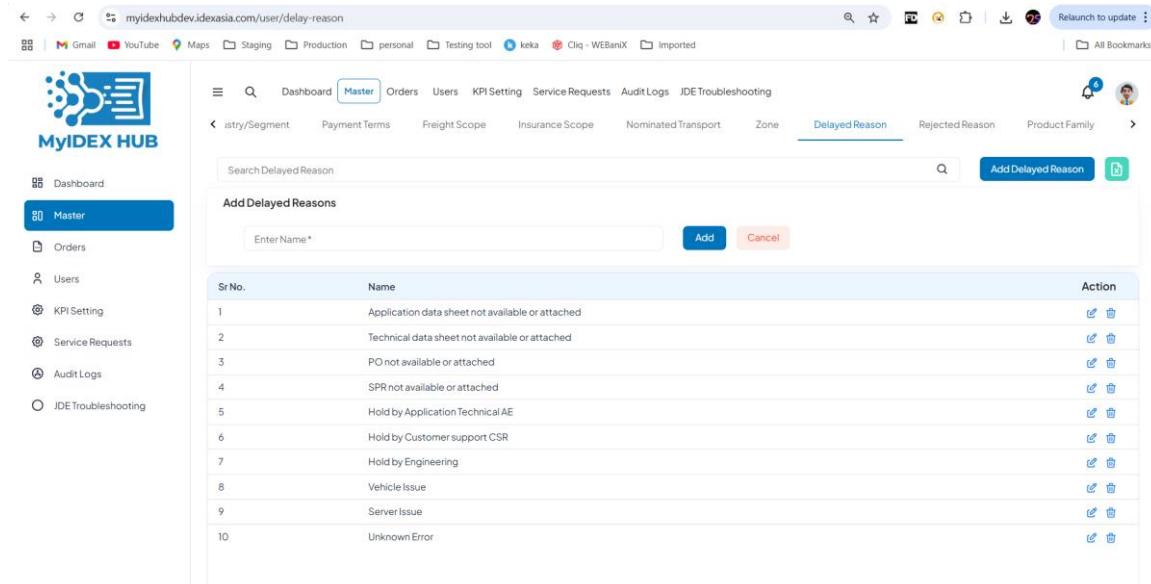
Delayed Reason Master

SOP for Managing Delayed Reasons in MyIDEX HUB

This SOP (Standard Operating Procedure) outlines the process for managing delayed reasons in the MyIDEX HUB platform under the 'Master' section. It describes how to add, edit, and remove delayed reasons that are used to document and track causes for delivery delays.

Steps to Manage Delayed Reasons

1. Navigate to the MyIDEX HUB dashboard.
2. From the left sidebar, click on "Master".
3. Select "Delayed Reason" from the top tab bar.
4. To add a new reason:
 - - Enter the reason in the input box labeled "Enter Name*".
 - - Click the "Add" button to save the new delayed reason.
14. Existing reasons are listed in a table with options to edit or delete each entry.
6. To edit an entry, click the pencil icon under the "Action" column.
7. To delete an entry, click the trash bin icon under the "Action" column.



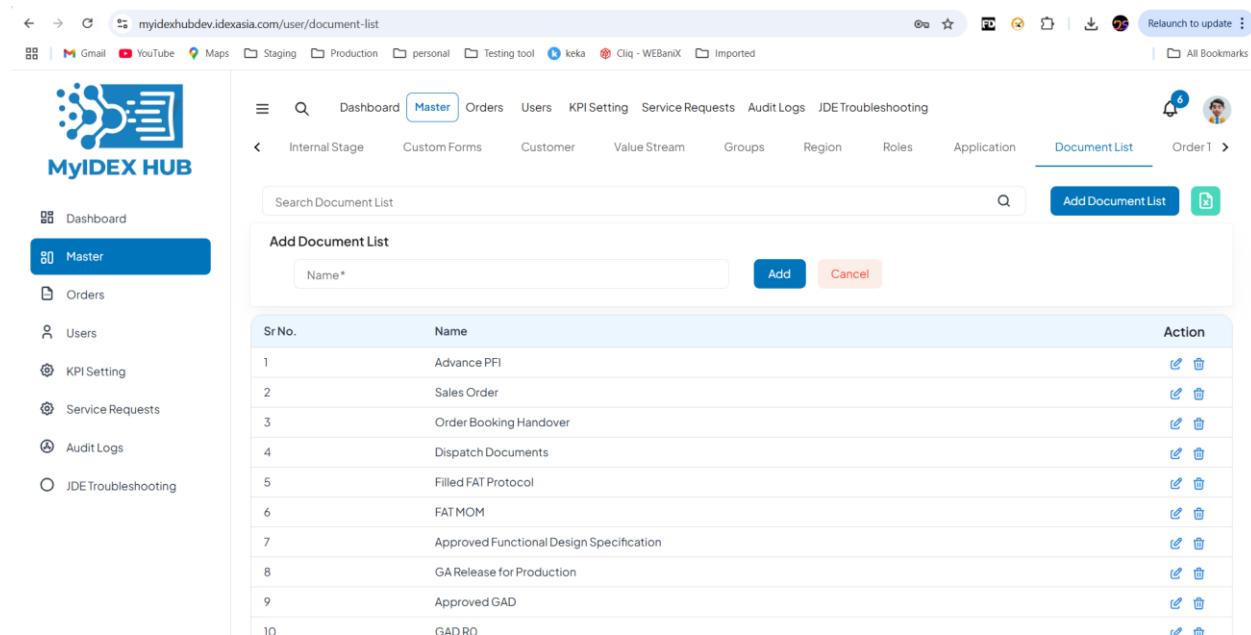
Sr No.	Name	Action
1	Application data sheet not available or attached	
2	Technical data sheet not available or attached	
3	PO not available or attached	
4	SPR not available or attached	
5	Hold by Application Technical AE	
6	Hold by Customer support CSR	
7	Hold by Engineering	
8	Vehicle Issue	
9	Server Issue	
10	Unknown Error	

Document List Master

This Standard Operating Procedure (SOP) outlines the steps to manage the Document List in the MyIDEX HUB platform.

Steps to Access and Manage Document List:

1. Log into the MyIDEX HUB platform.
2. From the left-hand side menu, navigate to "Master".
3. Click on the "Document List" tab from the top navigation bar.
4. The Document List page will be displayed, as shown below:



Sr No.	Name	Action
1	Advance PFI	
2	Sales Order	
3	Order Booking Handover	
4	Dispatch Documents	
5	Filled FAT Protocol	
6	FATMOM	
7	Approved Functional Design Specification	
8	GA Release for Production	
9	Approved GAD	
10	GAD RO	

5. To add a new document:

- a. Enter the document name in the "Name*" input box under "Add Document List".
- b. Click the "Add" button to save the document.
- c. To cancel the operation, click the "Cancel" button.

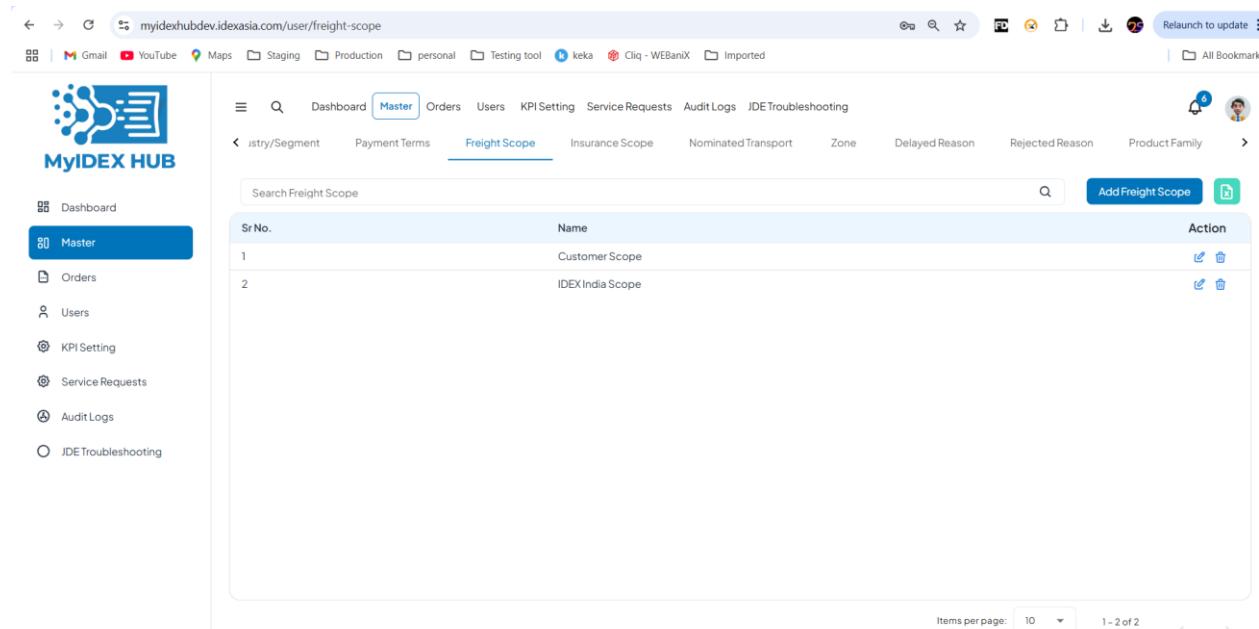
6. To edit or delete a document, use the respective edit (pencil) or delete (trash bin) icons in the "Action" column.

Freight Scope Master

This Standard Operating Procedure (SOP) provides steps to manage the Freight Scope section in the MyIDEX HUB platform. It includes viewing existing freight scopes and the procedure for adding or editing them.

1. Viewing Freight Scope

To view the existing freight scopes, navigate to the 'Master' section on the left panel and click on 'Freight Scope' from the top menu. The screen will display the list of available freight scopes.



SrNo.	Name	Action
1	Customer Scope	
2	IDEXIndia Scope	

2. Managing Freight Scope

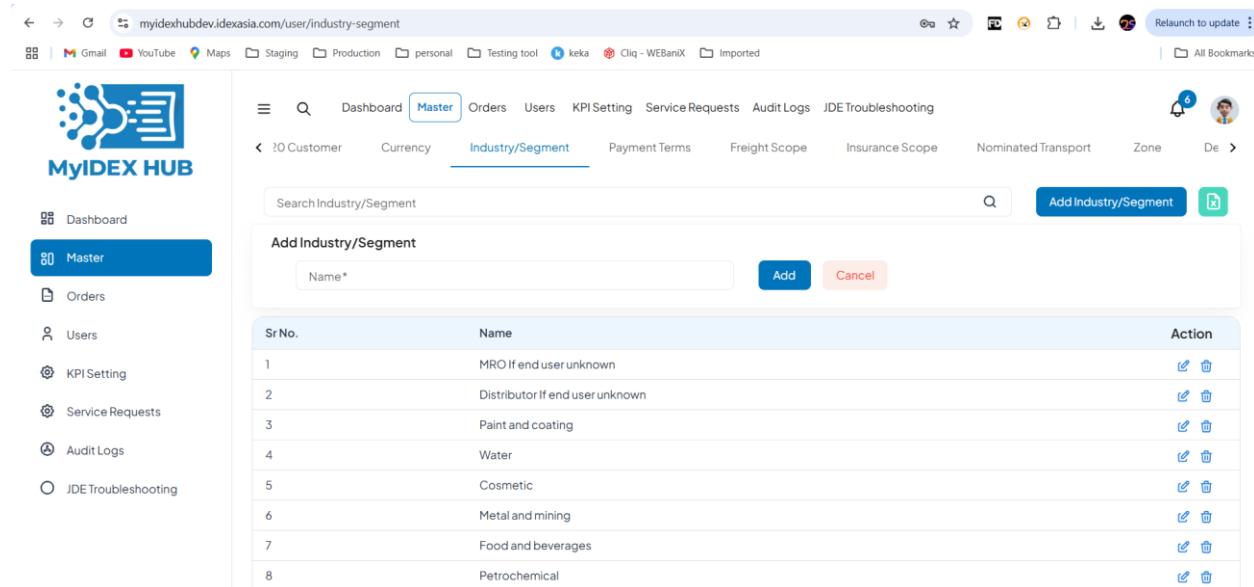
- To add a new Freight Scope, click on the 'Add Freight Scope' button.
- To edit an existing Freight Scope, click the pencil (edit) icon under the 'Action' column.
- To delete a Freight Scope, click the trash bin icon under the 'Action' column.
- Use the search bar to filter freight scopes by name quickly.

Industry/Segment Master

This Standard Operating Procedure (SOP) outlines the steps to manage Industry/Segment data in the MyIDEX HUB platform.

This includes adding new Industry/Segment entries and viewing or editing existing ones under the 'Master' section.

Screenshot of the Industry/Segment Master Screen



Sr No.	Name	Action
1	MRO If end user unknown	
2	Distributor If end user unknown	
3	Paint and coating	
4	Water	
5	Cosmetic	
6	Metal and mining	
7	Food and beverages	
8	Petrochemical	

Steps to Manage Industry/Segment Master

1. Navigate to the 'Master' section in the left menu.
2. Click on the 'Industry/Segment' tab from the top menu.
3. To add a new Industry/Segment:
 - a. Click on 'Add Industry/Segment' button.
 - b. Enter the industry/segment name in the text box.
 - c. Click 'Add' to save the new entry or 'Cancel' to discard.
4. To search for an existing Industry/Segment, use the search bar.
5. To edit or delete an existing entry, use the respective action icons under the 'Action' column.

Insurance Scope Master

Purpose:

This SOP outlines the steps required to manage the Insurance Scope section in the MyIDEX HUB system. It includes instructions for viewing, adding, editing, and deleting entries under the Insurance Scope.

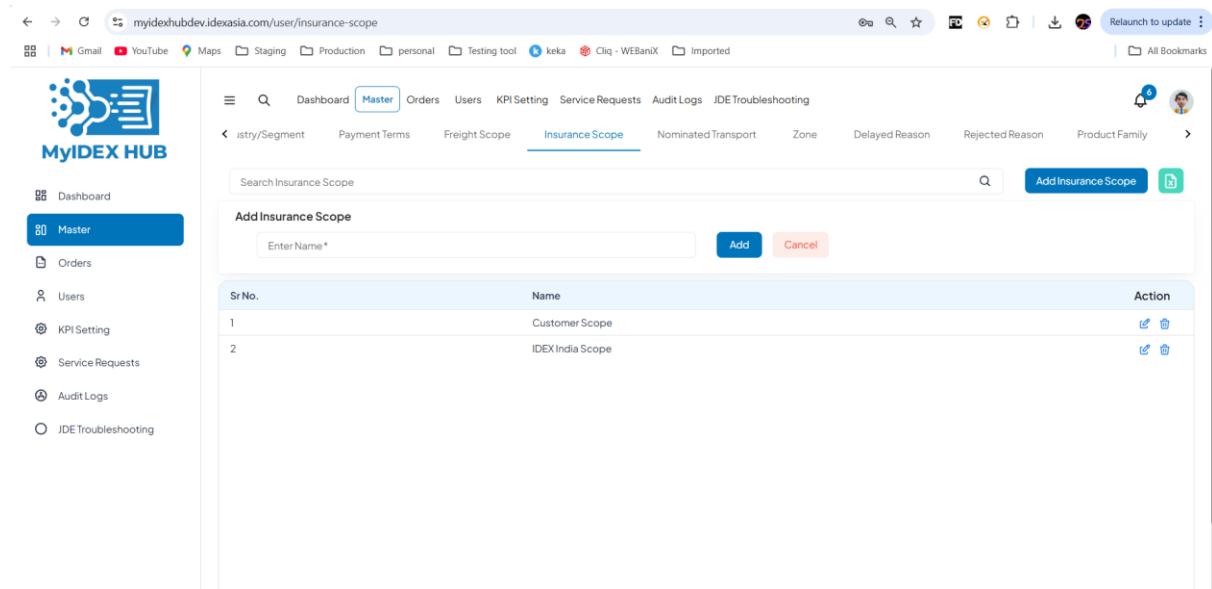
Scope:

This SOP is applicable to all users who are responsible for maintaining insurance-related data within the MyIDEX HUB platform.

Procedure:

1. Navigate to the 'Master' section in the left-side menu.
2. Click on the 'Insurance Scope' tab in the top navigation bar.
3. View the list of existing Insurance Scopes.
4. To add a new Insurance Scope:
 - a. Enter the name in the 'Enter Name' field.
 - b. Click on the blue 'Add' button.
5. To edit an existing entry, click the pencil (edit) icon under the 'Action' column.
6. To delete an entry, click the trash (delete) icon under the 'Action' column.

Screenshot:



Sr No.	Name	Action
1	Customer Scope	
2	IDEX India Scope	

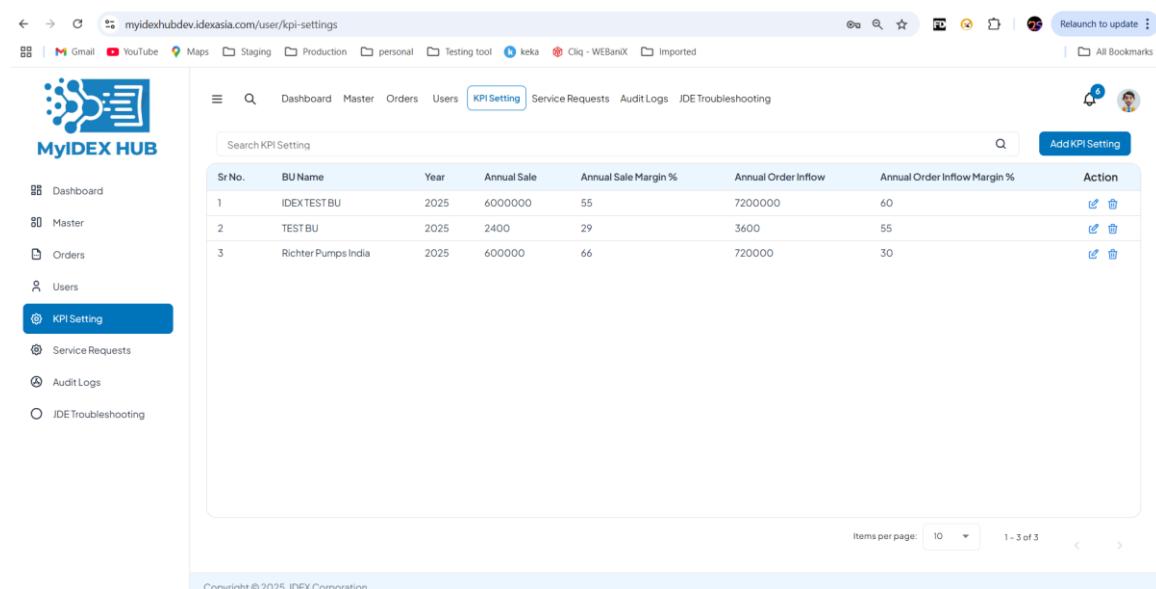
Figure 1: Insurance Scope interface on MyIDEX HUB.

KPI Settings in MyIDEX HUB

This Standard Operating Procedure (SOP) provides steps for managing KPI Settings data in the MyIDEX HUB platform. It includes the process for adding, editing, and deleting entries in the KPI Settings section .

Step 1: Navigate to KPI Settings

1. Log in to the MyIDEX HUB application.
2. From the left-hand sidebar, click on 'KPI Setting' to view the KPI records.



The screenshot shows the 'KPI Setting' page in the MyIDEX HUB application. The URL in the browser is 'myidexhubdev.idexasia.com/user/kpi-settings'. The left sidebar has a 'KPI Setting' button highlighted in blue. The main content area displays a table of KPI data with the following columns: Sr No., BU Name, Year, Annual Sale, Annual Sale Margin %, Annual Order Inflow, Annual Order Inflow Margin %, and Action. There are three rows of data:

Sr No.	BU Name	Year	Annual Sale	Annual Sale Margin %	Annual Order Inflow	Annual Order Inflow Margin %	Action
1	IDEXTESTBU	2025	6000000	55	7200000	60	
2	TESTBU	2025	2400	29	3600	55	
3	Richter Pumps India	2025	600000	66	720000	30	

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Step 2: Add KPI Setting

1. Click on the 'Add KPI Setting' button located at the top-right.
2. Fill in the required fields such as BU, Year, Annual Sale, Margins, etc.
3. Enter monthly data for Sales, Margin %, Order Inflow, etc.
4. Click the 'Add' button to save the data.

The screenshot shows a web-based application interface for managing KPI settings. On the left, there's a sidebar with navigation links: Dashboard, Master, Orders, Users, KPI Setting (which is highlighted in blue), Service Requests, Audit Logs, and IDE Troubleshooting. The main content area has a header with tabs: Dashboard, Master, Orders, Users, KPI Setting (selected), Service Requests, Audit Logs, and IDE Troubleshooting. Below the header, there are several input fields and tables:

- Select BU:** A dropdown menu.
- Year:** A dropdown menu.
- Annual Sale:** An input field.
- Margin %:** An input field.
- AOP Months:** A table with columns for Months (January to December) and rows for Sales, Margin %, Order Inflow, and Margin %.
- Sales Forecast:** A table with columns for Months (January to December) and rows for Sales and Margin %.
- Order Inflow Forecast:** A table with columns for Months (January to December) and rows for Order Inflow and Margin %.

At the bottom right of the form are two buttons: "Add" (blue) and "Cancel" (red).

Step 3: Edit KPI Setting

1. Locate the KPI entry you want to edit in the list.
2. Click the pencil/edit icon under the 'Action' column.
3. Update the necessary information in the form.
4. Click the 'Update' or 'Save' button to apply the changes.

Step 4: Delete KPI Setting

1. Locate the KPI entry you wish to delete.
2. Click the trash/delete icon under the 'Action' column.
3. Confirm the deletion when prompted.
4. The KPI entry will be permanently removed from the list.

NOTE : "Only one KPI Setting can be added per BU for a particular year."

LD Clause Master

Login to MyIDEX HUB and from the left side menu, click on 'Master'. Under the 'Master' section click on the LD clause

1. Purpose

The purpose of this Standard Operating Procedure (SOP) is to provide clear instructions for managing the LD (Liquidated Damages) Clauses within the MyIDEX HUB platform. This includes adding, editing, and deleting LD Clauses.

2. Scope

This procedure applies to all users with access rights to modify the Master section under the LD Clauses tab in the MyIDEX HUB system.

3. Responsibilities

It is the responsibility of the authorized personnel to ensure that accurate LD Clauses are maintained within the system.

4. Procedure

Follow the steps below to manage LD Clauses:

Step 1: Log in to the MyIDEX HUB platform.

Step 2: Navigate to the 'Master' section from the left-hand menu.

Step 3: Click on the 'LD Clauses' tab at the top.

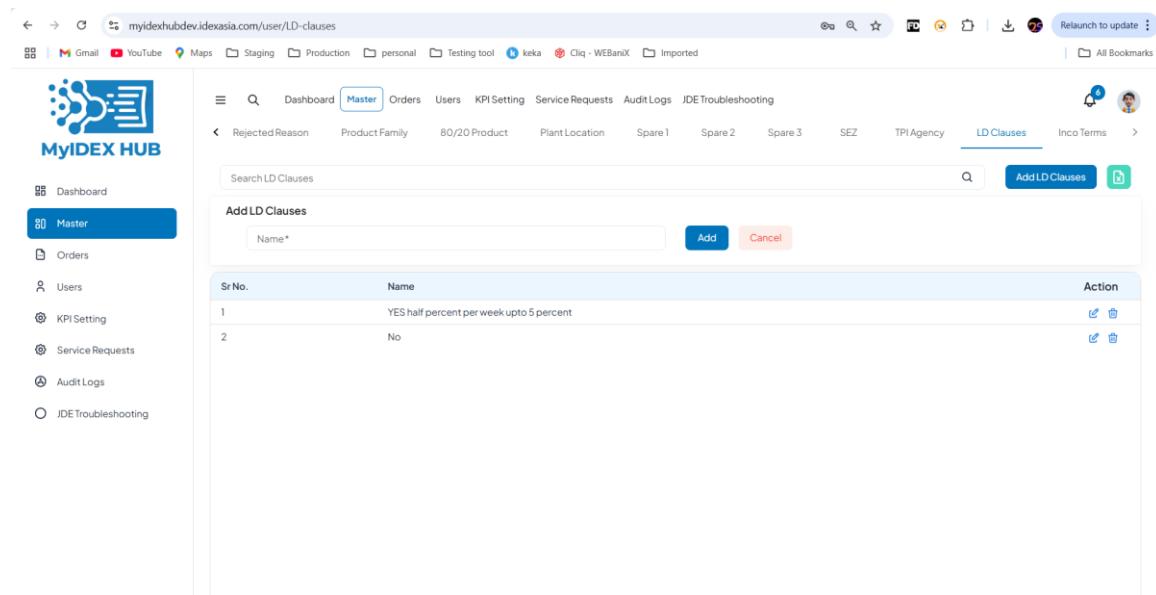
Step 4: To add a new clause, enter the name of the LD Clause in the 'Add LD Clauses' section and click 'Add'.

Step 5: To edit an existing entry, click the pencil icon under the 'Action' column.

Step 6: To delete an entry, click the trash icon under the 'Action' column.

5. Screenshot

Below is a screenshot of the LD Clauses interface:



The screenshot shows the 'LD Clauses' section of the MyIDEX HUB application. The left sidebar has a 'Master' tab selected. The main area displays a table of LD clauses:

Sr No.	Name	Action
1	YES half percent per week upto 5 percent	
2	No	

6. Notes

Ensure that all data entered is accurate and up to date. Deleting or editing clauses should be done with caution as it affects compliance tracking.

Inco Terms Master

This Standard Operating Procedure (SOP) outlines the steps to view, add, edit, and delete Inco Terms in the MyIDEX HUB platform.

Step-by-Step Instructions

1. Access the Inco Terms Section

Navigate to the 'Master' section on the left-hand panel, then select 'Inco Terms' from the tab options at the top of the screen.

2. Add a New Inco Term

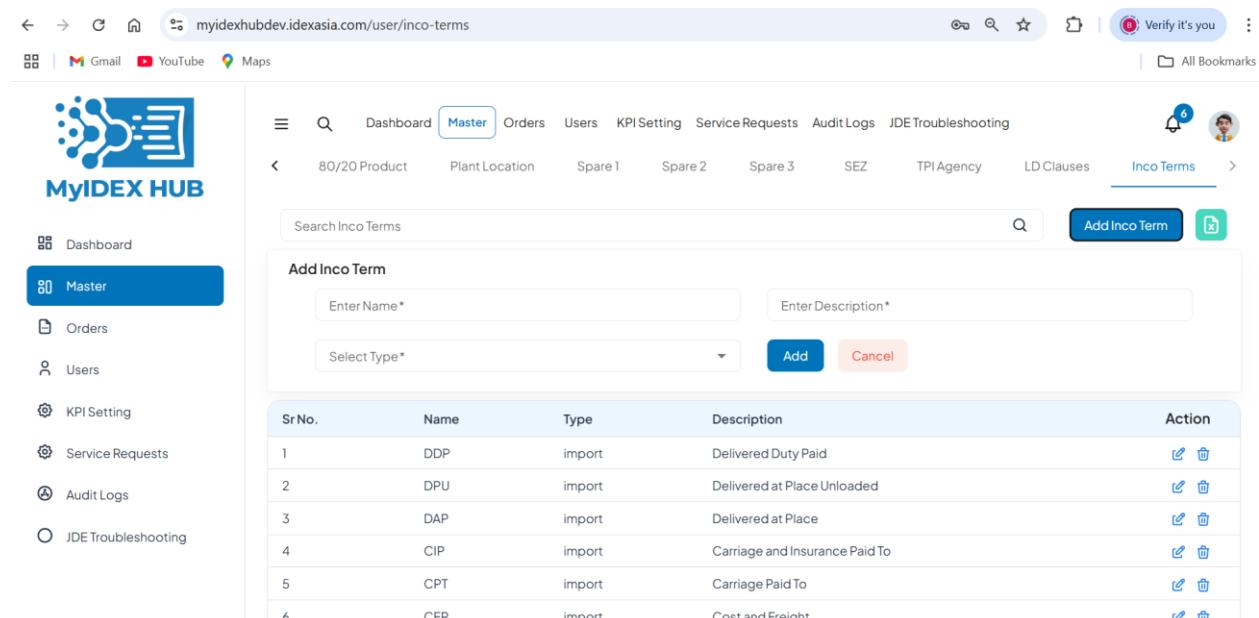
To add a new Inco Term, follow the steps below:

- Enter the name of the Inco Term in the 'Enter Name' field.
- Select the type from the dropdown (e.g., import).
- Enter a description in the 'Enter Description' field.
- Click on the 'Add' button to save the new Inco Term.

3. Edit or Delete Existing Inco Terms

In the list of existing Inco Terms, use the pencil icon under the 'Action' column to edit a term, or the trash bin icon to delete it.

Screenshot



Sr No.	Name	Type	Description	Action
1	DDP	import	Delivered Duty Paid	
2	DPU	import	Delivered at Place Unloaded	
3	DAP	import	Delivered at Place	
4	CIP	import	Carriage and Insurance Paid To	
5	CPT	import	Carriage Paid To	
6	CFR	import	Cost and Freight	

Nature of Complaints Master

Objective

The purpose of this SOP is to outline the steps required to manage the 'Nature of Complaints' section in the MyIDEX HUB system. This ensures that all complaint types are recorded accurately for future tracking and reporting.

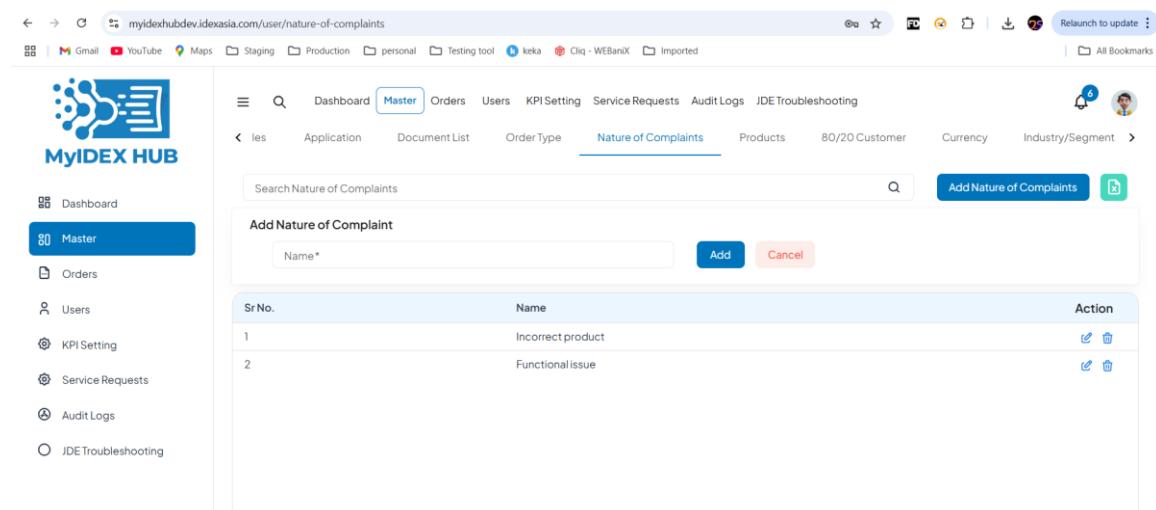
Scope

This SOP is applicable to all users who are responsible for maintaining complaint categories in the MyIDEX HUB system.

Procedure

1. Navigate to the 'Master' module from the left-hand menu.
2. Click on the 'Nature of Complaints' tab from the top navigation bar.
3. To add a new complaint type:
 - a. Enter the name of the complaint in the 'Name' field under 'Add Nature of Complaint'.
 - b. Click the 'Add' button.
4. To edit an existing complaint type, click the pencil icon next to the respective entry.
5. To delete an existing complaint type, click the trash bin icon next to the respective entry.
6. Use the search bar to quickly locate a specific complaint type.

Screenshot

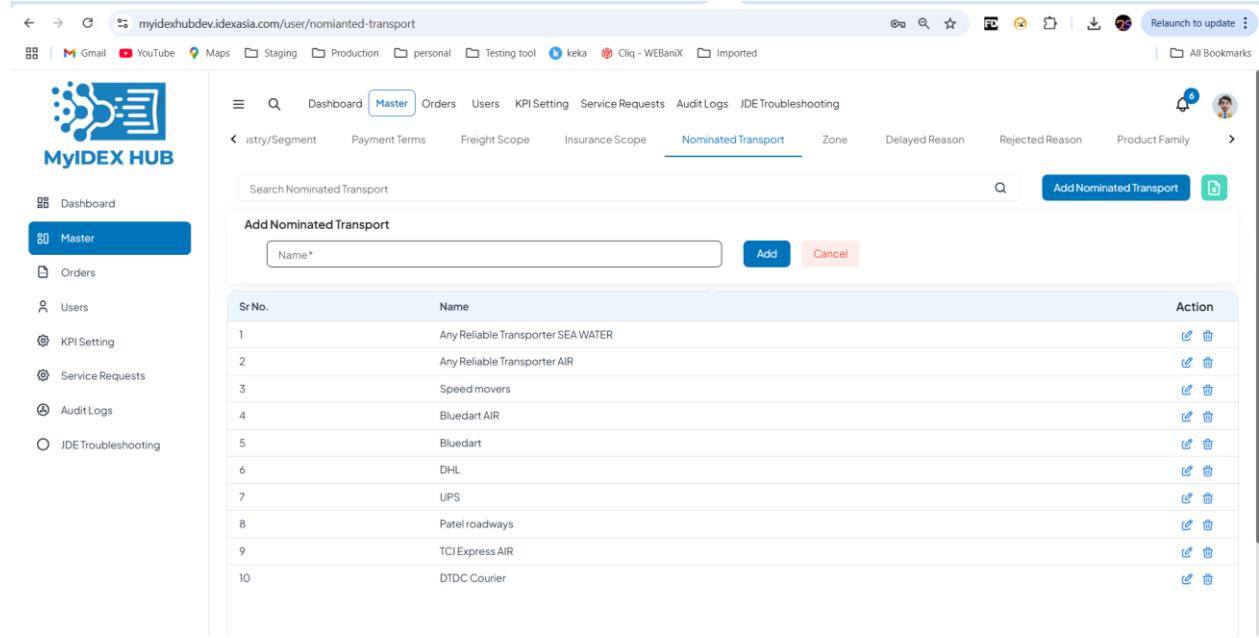


The screenshot shows the 'Nature of Complaints' master page in the MyIDEX HUB system. The left sidebar has a 'Master' module selected. The top navigation bar includes tabs for Dashboard, Orders, Users, KPI Setting, Service Requests, Audit Logs, and JDE Troubleshooting. The current tab is 'Nature of Complaints'. A search bar at the top allows for searching by Name. Below the search bar is a 'Add Nature of Complaint' form with a 'Name*' input field, an 'Add' button, and a 'Cancel' button. A table lists existing complaints with columns for Sr No., Name, and Action (edit and delete icons). Two entries are listed: '1' (Incorrect product) and '2' (Functional issue).

Sr No.	Name	Action
1	Incorrect product	
2	Functional issue	

Nominated Transport Master

This document outlines the steps and interface for managing the 'Nominated Transport' section in the MyIDEX HUB platform. Users can add, edit, or delete transporter names that are nominated for shipments.



Sr No.	Name	Action
1	Any Reliable Transporter SEA WATER	
2	Any Reliable Transporter AIR	
3	Speed movers	
4	Bluedart AIR	
5	Bluedart	
6	DHL	
7	UPS	
8	Patel roadways	
9	TCI Express AIR	
10	DTDC Courier	

Figure 1: Nominated Transport Interface in MyIDEX HUB

Steps to Use the Nominated Transport Section

1. Navigate to the 'Master' tab on the left menu.
2. Click on the 'Nominated Transport' option from the top navigation bar.
3. To add a new transporter, enter the name in the input box under 'Add Nominated Transport' and click 'Add'.
4. To edit an existing transporter name, click the edit icon under the 'Action' column.
5. To delete a transporter, click the delete icon under the 'Action' column.

Order Type Master

Objective:

This SOP outlines the steps to add and manage Order Types within the MyIDEX HUB application under the "Master" module.

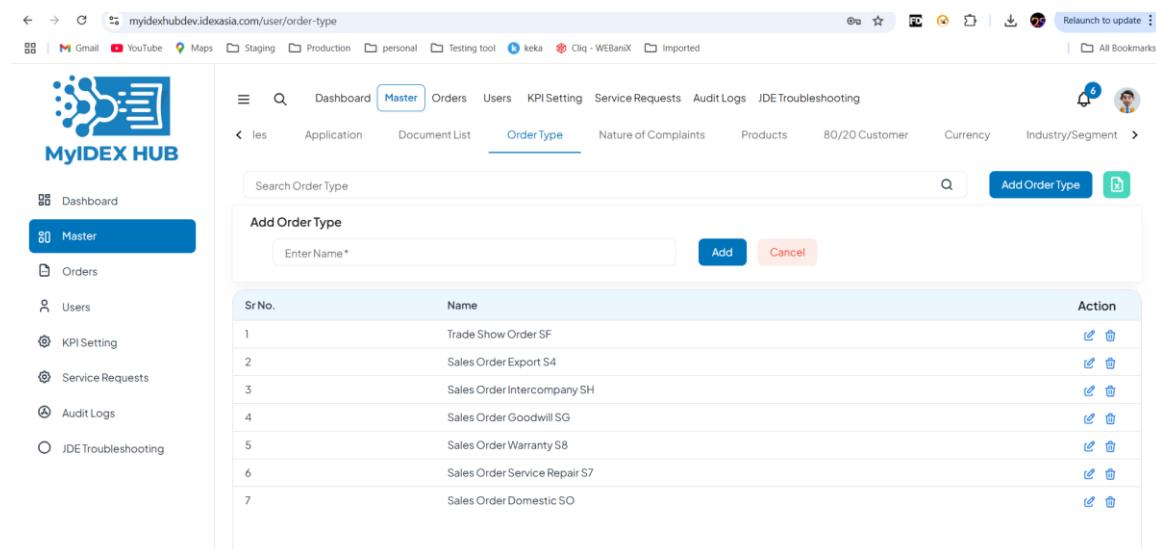
Prerequisites:

- User must be logged into MyIDEX HUB.
- User must have the necessary permissions to add or edit Order Types.

Steps to Add Order Type:

1. Navigate to the "Master" module from the left-side menu.
2. Click on the "Order Type" tab from the top sub-menu.
3. Enter the name of the Order Type in the "Enter Name*" field.
4. Click the "Add" button to add the Order Type.
5. To edit an existing Order Type, click the pencil icon under the "Action" column.
6. To delete an Order Type, click the trash bin icon under the "Action" column.

Screenshot:



The screenshot shows the 'Order Type' sub-module within the 'Master' module of the MyIDEX HUB. The left sidebar has a 'Master' button highlighted in blue. The main area has a sub-navigation bar with tabs like 'Dashboard', 'Master' (highlighted), 'Orders', 'Users', 'KPI Setting', 'Service Requests', 'Audit Logs', 'JDE Troubleshooting'. Below this is a search bar and a 'Search Order Type' input field. A 'Add Order Type' button is visible. A table lists existing Order Types with columns for 'Sr No.', 'Name', and 'Action' (containing edit and delete icons). The table data is as follows:

Sr No.	Name	Action
1	Trade Show Order SF	
2	Sales Order Export S4	
3	Sales Order Intercompany SH	
4	Sales Order Goodwill SG	
5	Sales Order Warranty S8	
6	Sales Order Service Repair S7	
7	Sales Order Domestic SO	

Plant Location Master

This Standard Operating Procedure (SOP) provides steps for managing Plant Location data in the MyIDEX HUB platform. It includes the process for adding, editing, and deleting entries in the plant location section under the Master module.

Step 1: Navigate to 'Plant Location'

From the left sidebar menu, click on 'Master'. Then from the top menu, select the 'Plant Location' tab. You will be directed to the Plant Location management screen.

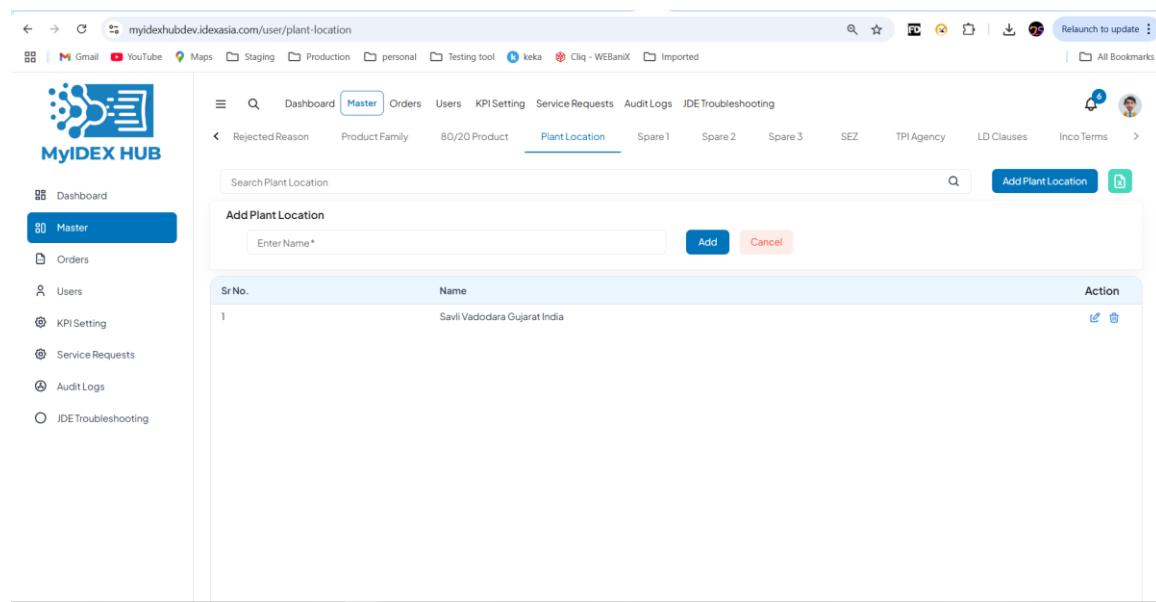
Step 2: Add a New Plant Location

In the 'Add Plant Location' section, enter the name of the plant location in the provided text field. Once entered, click the blue 'Add' button to save the new plant location.

Step 3: View or Manage Existing Locations

All added plant locations will be listed in a table below the entry form. You can use the edit (pencil icon) or delete (trash icon) buttons under the 'Action' column to modify or remove a location.

Screenshot



SrNo.	Name	Action
1	Savli Vadodara Gujarat India	

Product Family Master

1. Overview

This Standard Operating Procedure (SOP) outlines the steps to manage the 'Product Family' section within the MyIDEX HUB platform. This module allows users to add, edit, and delete Product Families.

2. Navigation

To access the Product Family module:

1. Log into the MyIDEX HUB system.
2. Navigate to the left sidebar and click on 'Master'.
3. Click on the 'Product Family' tab on the top menu.

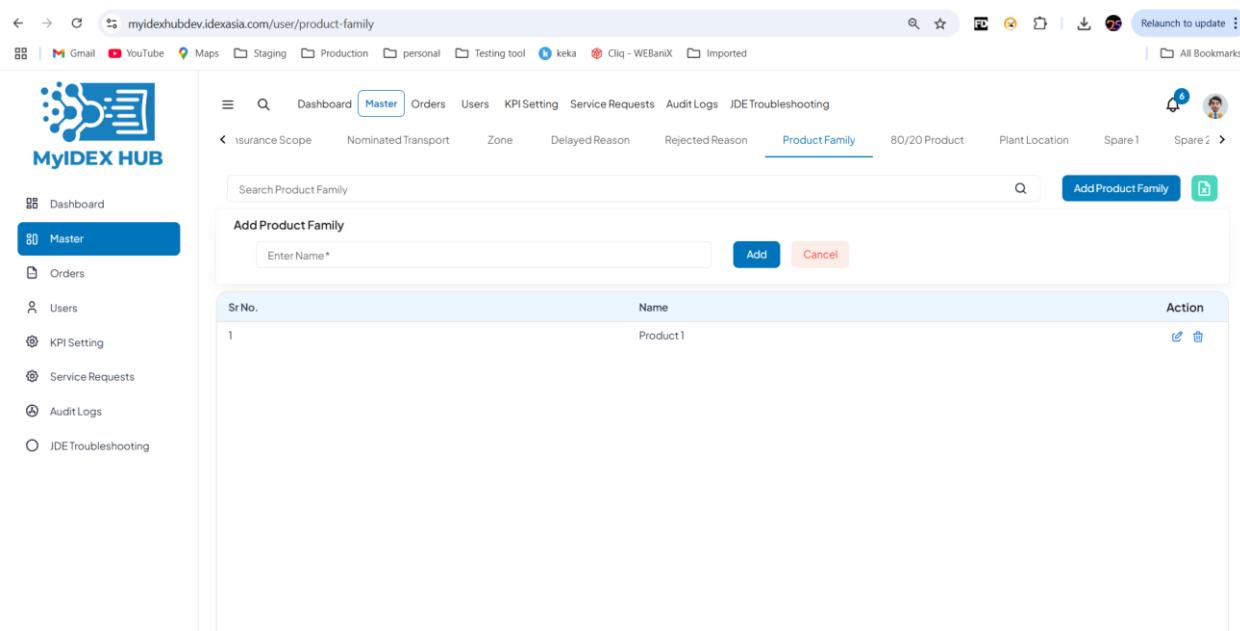
3. Add Product Family

1. Enter the name of the product family in the 'Enter Name' field.
2. Click the blue 'Add' button to save the new product family.

4. Edit/Delete Product Family

Each product family listed has two actions under the 'Action' column:

- Edit (pencil icon): Modify the existing name.
- Delete (trash bin icon): Remove the product family.



Sr No.	Name	Action
1	Product1	

Products Master

Objective:

This Standard Operating Procedure (SOP) outlines the steps to add and manage products in the "Product" section of the MyIDEX HUB application.

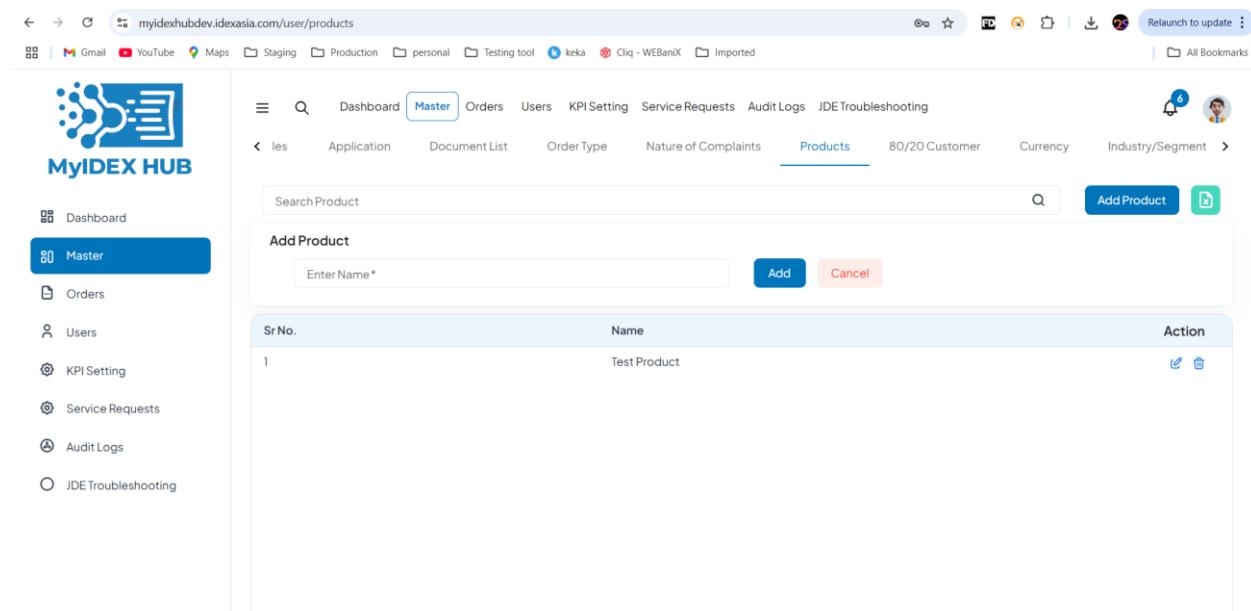
Scope:

This procedure applies to all users responsible for managing product master data in the system.

Procedure:

1. Navigate to the MyIDEX HUB and log in.
2. From the left-hand navigation menu, click on "Master".
3. Select "Products" from the top navigation bar.
4. To add a new product:
 - a. Enter the product name in the "Enter Name" input field.
 - b. Click the "Add" button to save the product.
5. The added product will appear in the table below.
6. To edit or delete a product, use the respective icons under the "Action" column.

Screenshot:



Sr No.	Name	Action
1	Test Product	

Rejected Reasons Master

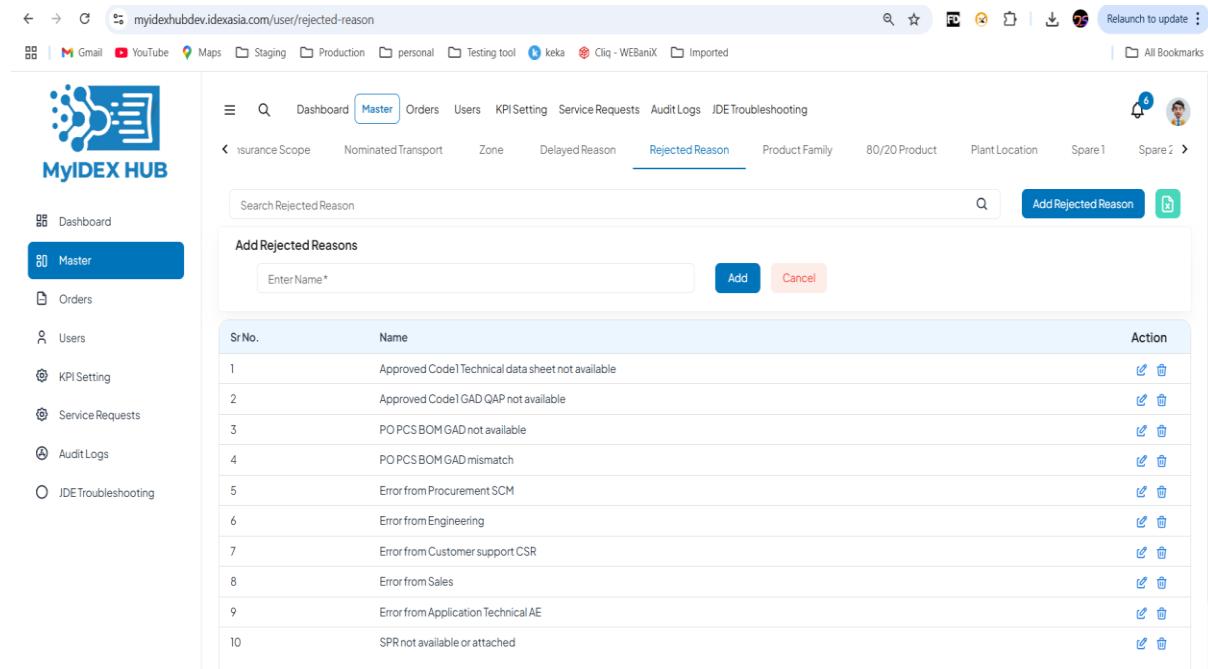
This Standard Operating Procedure (SOP) provides step-by-step instructions to manage 'Rejected Reasons' in the MyIDEX HUB system under the Master section.

Steps to Add a Rejected Reason

1. Navigate to the 'Master' section from the sidebar.
2. Click on the 'Rejected Reason' tab in the top navigation menu.
3. Enter the reason for rejection in the 'Enter Name' field under 'Add Rejected Reasons'.
4. Click on the blue 'Add' button to save the new reason.
5. To cancel, click on the 'Cancel' button.

Editing or Deleting Rejected Reasons

1. Locate the reason in the list displayed.
2. Use the edit (pencil) icon under the 'Action' column to modify the reason.
3. Use the delete (trash bin) icon to remove the reason from the list.



Sr No.	Name	Action
1	Approved Code1 Technical data sheet not available	
2	Approved Code1 GAD QAP not available	
3	PO PCS BOM GAD not available	
4	PO PCS BOM GAD mismatch	
5	Error from Procurement SCM	
6	Error from Engineering	
7	Error from Customer support CSR	
8	Error from Sales	
9	Error from Application Technical AE	
10	SPR not available or attached	

SEZ Master

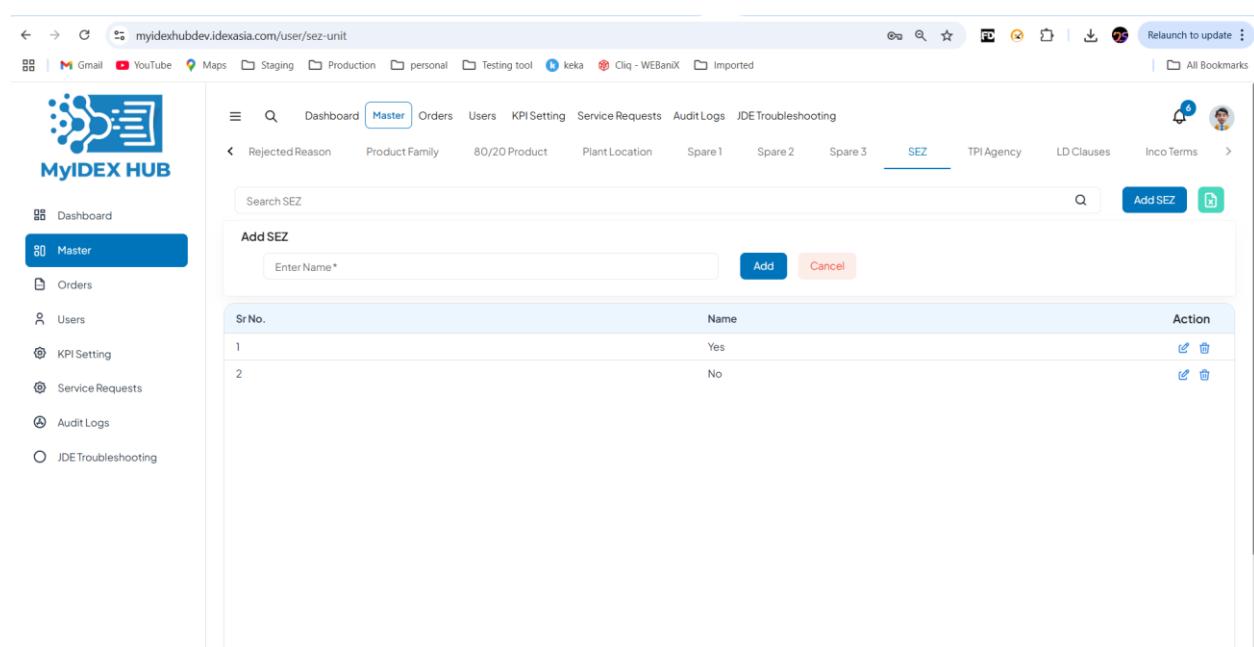
This document provides a Standard Operating Procedure (SOP) for adding an SEZ entry in the MyIDEX HUB platform.

Step 1: Navigate to SEZ Section

1. Log in to MyIDEX HUB.
2. From the left sidebar, click on 'Master'.
3. From the top tab options, click on 'SEZ'.

Step 2: Add SEZ Entry

1. Enter the SEZ name (e.g., 'Yes' or 'No') in the input field under the 'Add SEZ' section.
2. Click the 'Add' button to save the entry.
3. The new entry will appear in the list below with options to edit or delete.



Sr No.	Name	Action
1	Yes	
2	No	

Screenshot: SEZ Management Interface

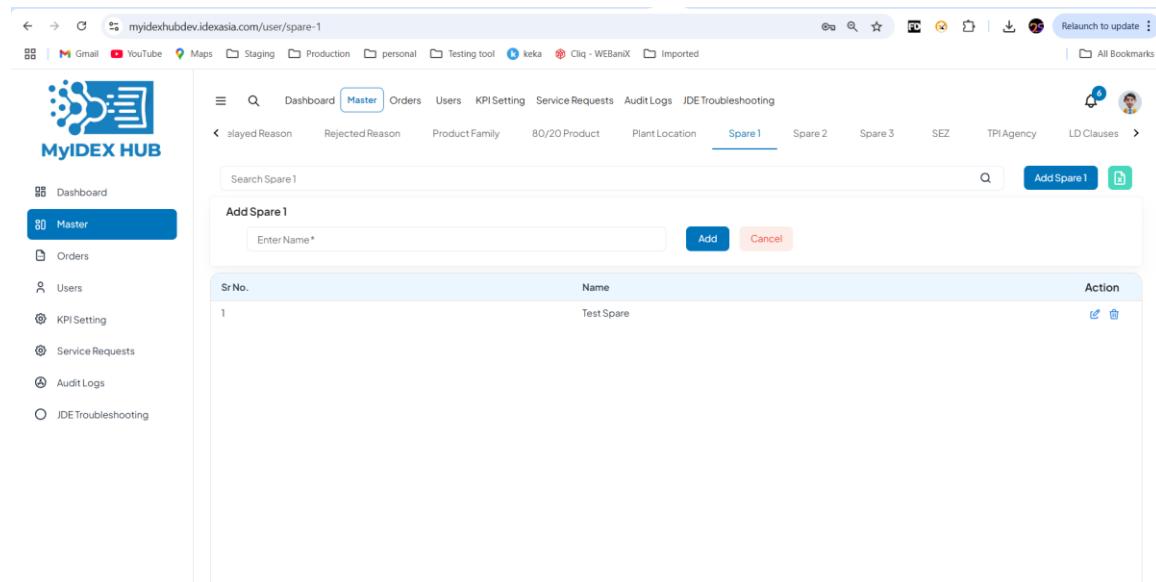
Spare 1 Master

This document outlines the Standard Operating Procedure (SOP) for adding entries into the 'Spare 1' section of the MyIDEX HUB system.

Steps to Add a Spare 1 Entry:

1. Log in to the MyIDEX HUB system.
2. Navigate to the left-hand panel and click on the 'Master' menu.
3. Click on the 'Spare 1' tab at the top navigation panel.
4. In the 'Add Spare 1' section, enter the desired name into the text input box.
5. Click on the blue 'Add' button to save the entry.
6. The newly added entry will appear in the table below with a serial number.
7. Use the 'Edit' (pencil icon) or 'Delete' (trash icon) options under the 'Action' column for any modifications.

Screenshot:



Sr No.	Name	Action
1	Test Spare	

Add Spare 1

Enter Name*

Add Cancel

Spare 2 Master

Objective:

To provide a step-by-step guide on how to add a new entry in the Spare 2 section of the MyIDEX HUB platform.

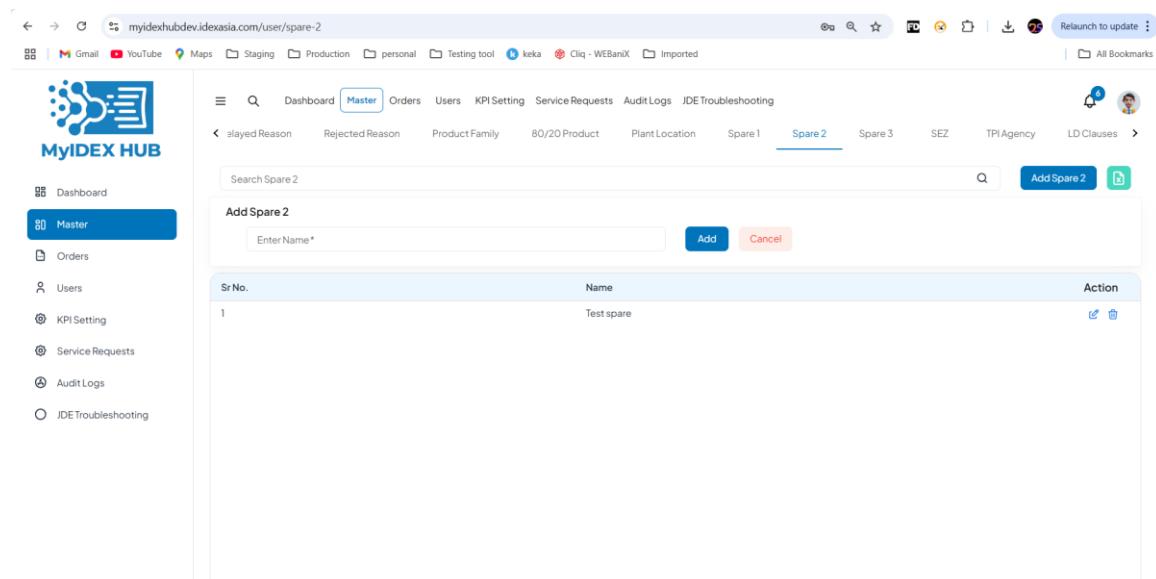
Scope:

This SOP is applicable to all users who are responsible for maintaining Spare 2 data in the Master section of MyIDEX HUB.

Procedure:

1. Navigate to the Master section from the left-hand side menu.
2. Click on the "Spare 2" tab.
3. In the "Add Spare 2" field, enter the name of the spare item.
4. Click on the "Add" button to save the entry.
5. The newly added item will appear in the list below with options to edit or delete.

Screenshot:



Sr No.	Name	Action
1	Test spare	

Spare 3 Master

1. Introduction

This Standard Operating Procedure (SOP) outlines the steps required to add a new Spare 3 item in the MyIDEX HUB platform. The purpose of this SOP is to guide users through the interface and ensure consistency in data entry.

2. Prerequisites

- Access to the MyIDEX HUB platform
- User account with necessary permissions to access the 'Master' section
- Internet connection and a web browser

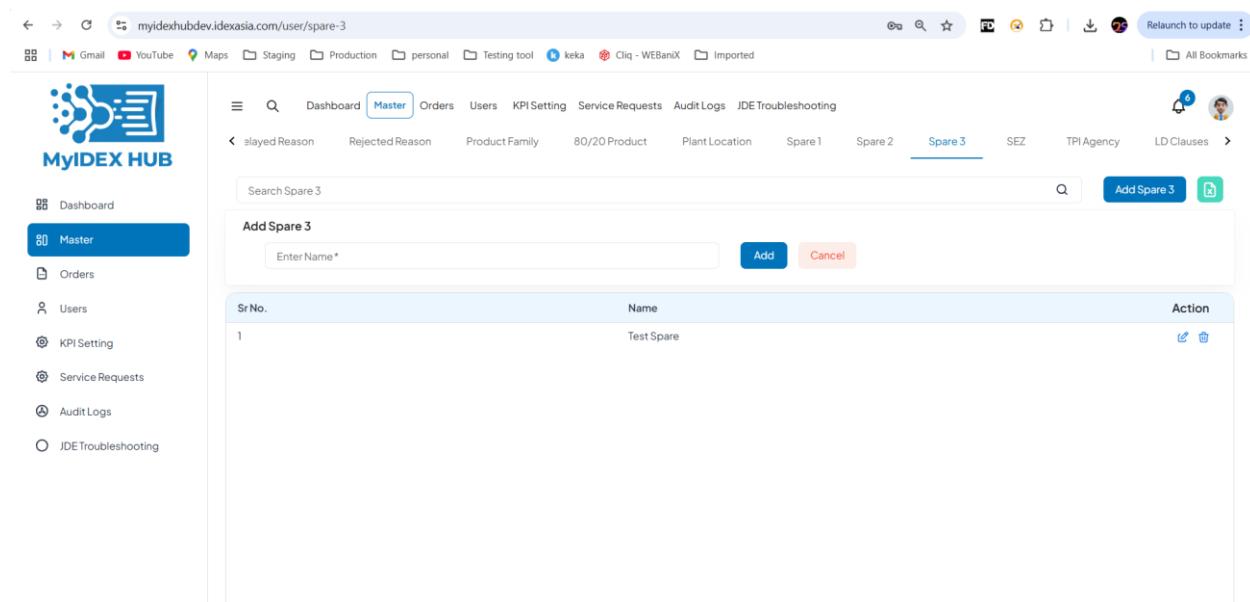
3. Steps to Add Spare 3

Follow the steps below to add a Spare 3 entry:

7. Step 1: Login to MyIDEX HUB and navigate to the Master section.
8. Step 2: Click on the 'Spare 3' tab from the available sub-tabs.
9. Step 3: Enter the spare name in the 'Enter Name' field under the 'Add Spare 3' section.
10. Step 4: Click on the blue 'Add' button to save the spare entry.
11. Step 5: The newly added spare will appear in the list below with options to edit or delete it.

4. Screenshot

Below is the screenshot of the 'Spare 3' section for reference:



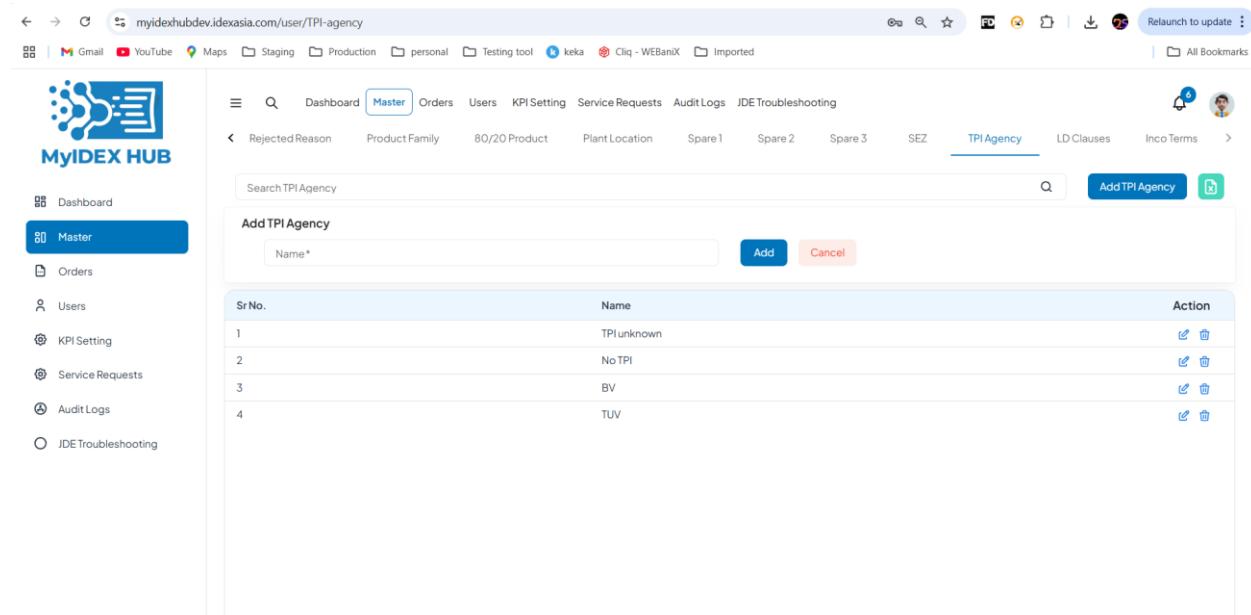
SrNo.	Name	Action
1	Test Spare	

TPI Agency Master

This Standard Operating Procedure (SOP) provides a step-by-step guide for managing the 'TPI Agency' section in the MyIDEX HUB system. This module is used to maintain Third-Party Inspection (TPI) agencies that are associated with various service or product quality checks.

TPI Agency Management Interface

Below is the interface for managing TPI Agencies in the MyIDEX HUB system:



Sr No.	Name	Action
1	TPI unknown	
2	No TPI	
3	BV	
4	TUV	

Figure 1: TPI Agency management screen.

Steps to Add a New TPI Agency

1. Navigate to the 'Master' section in the left menu.
2. Select 'TPI Agency' from the top menu.
3. In the 'Add TPI Agency' section, enter the name of the new TPI agency.
4. Click on the blue 'Add' button to save the new agency.
5. The added agency will appear in the list with a serial number.

Steps to Edit or Delete a TPI Agency

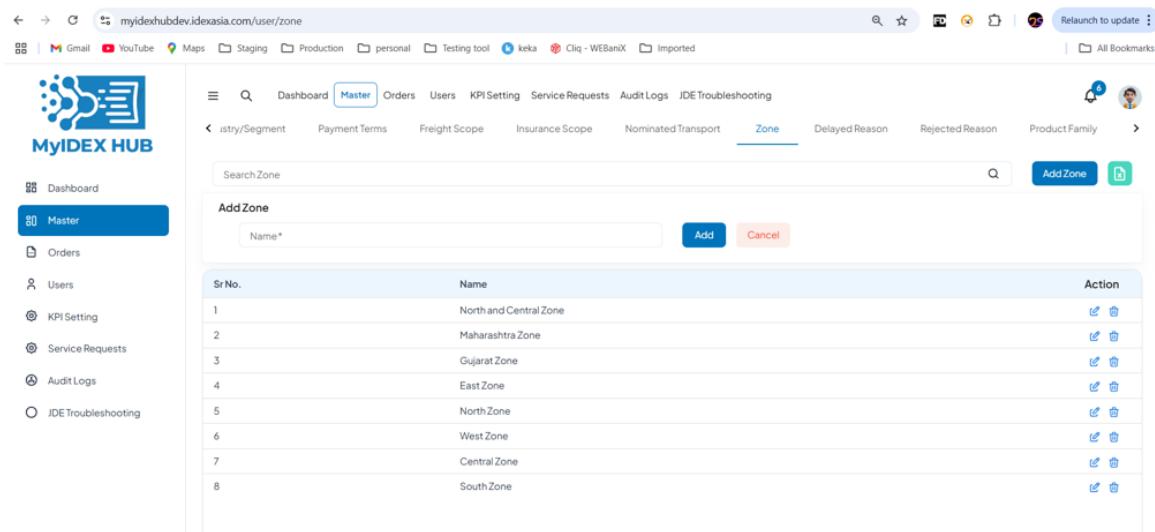
1. To edit an existing TPI agency, click the pencil (edit) icon under the 'Action' column.
2. Update the name and save the changes.
3. To delete a TPI agency, click the trash bin (delete) icon under the 'Action' column.

Zone Master

This document outlines the steps to manage zones in the MyIDEX HUB system under the 'Master' module.

1. Accessing the Zone Section

1. Navigate to the 'Master' tab in the left-hand menu.
2. Click on the 'Zone' tab from the top navigation bar.
3. The page displays a list of existing zones with options to edit or delete each zone.



Sr No.	Name	Action
1	North and Central Zone	
2	Maharashtra Zone	
3	Gujarat Zone	
4	East Zone	
5	North Zone	
6	West Zone	
7	Central Zone	
8	South Zone	

2. Adding a New Zone

1. Enter the desired zone name in the 'Add Zone' input field.
2. Click on the 'Add' button to save the new zone.
3. If you want to cancel, click the 'Cancel' button.

3. Managing Existing Zones

- Click the pencil icon under the 'Action' column to edit a zone.
- Click the trash bin icon to delete a zone.
- Use the search bar to filter the list of zones.

Role Master

Objective

This SOP outlines the procedure for managing user roles within the MyIDEX HUB platform, including adding, editing, and deleting roles.

Prerequisites

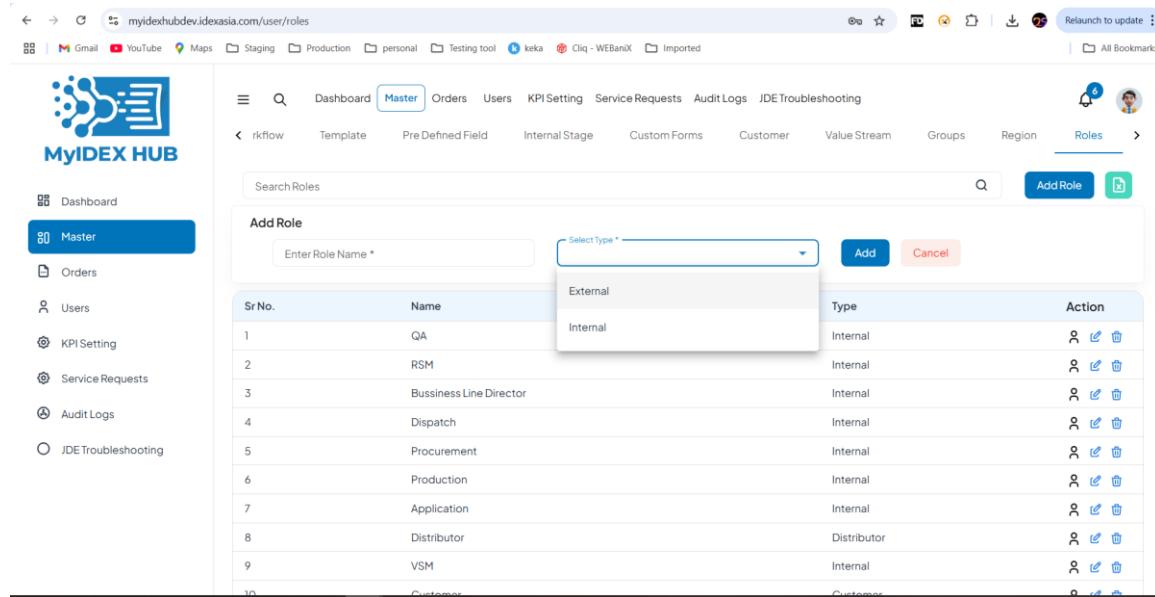
1. Valid login credentials for accessing the MyIDEX HUB platform.
2. Appropriate permissions to access and modify Role data under the 'Master' module.

Procedure

Follow the steps below to add a new role in MyIDEX HUB:

1. Navigate to the 'Master' tab on the left navigation menu.
2. Select the 'Roles' sub-tab from the top menu.
3. Enter the desired role name in the 'Enter Role Name' field.
4. Choose the role type (Internal/External) from the 'Select Type' dropdown.
5. Click the blue 'Add' button to save the new role.

Screenshot of Role Management Page:



The screenshot shows the 'Master' tab selected in the left sidebar. The 'Roles' sub-tab is active in the top navigation bar. A modal window titled 'Add Role' is open, prompting for 'Enter Role Name *' and 'Select Type *'. The 'Select Type' dropdown is set to 'External'. The main table lists existing roles with columns for Sr No., Name, Type, and Action. The 'Type' column shows values like Internal, External, and Customer. The 'Action' column contains icons for Edit, Delete, and other operations.

Sr No.	Name	Type	Action
1	QA	Internal	
2	RSM	Internal	
3	Bussiness Line Director	Internal	
4	Dispatch	Internal	
5	Procurement	Internal	
6	Production	Internal	
7	Application	Internal	
8	Distributor	Distributor	
9	VSM	Internal	
10	Customer	Customer	

Notes

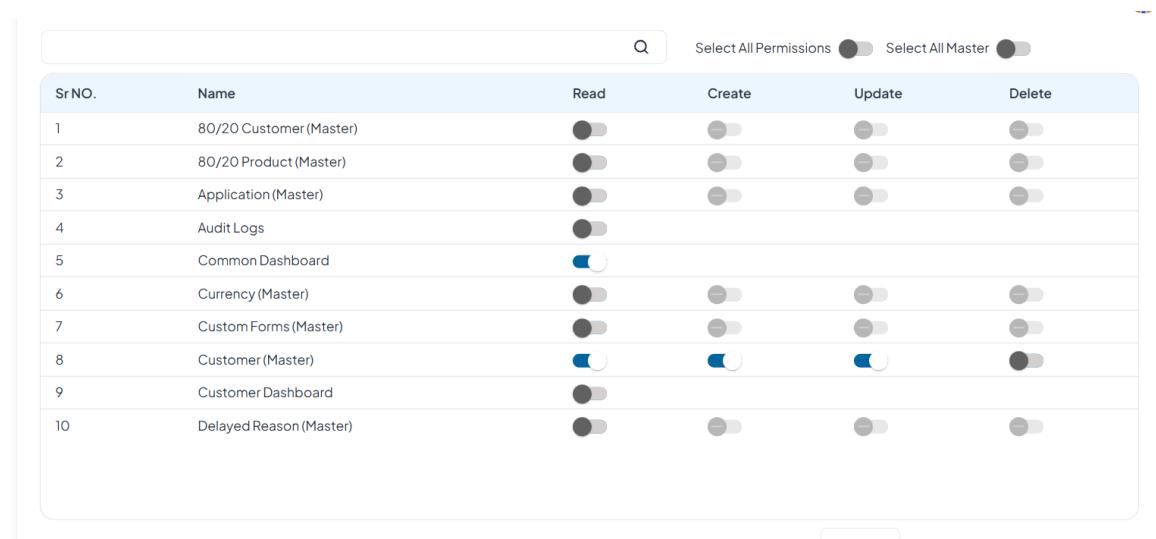
- To edit a role, click the pencil (edit) icon under the 'Action' column.
- To delete a role, click the trash bin icon under the 'Action' column.
- You can assign permission of different Master modules to roles by clicking the user icon in the 'Action' column.

Role Permission Mapping

Once a role is created, permissions for different modules and functionalities can be assigned by clicking the user icon under the 'Action' column. This will open the Role Permission Mapping interface as shown below.

1. Each row represents a module or feature in the system.
2. Use the toggle switches under Read, Create, Update, and Delete columns to enable or disable specific permissions for the role.
3. You can use 'Select All Permissions' or 'Select All Master' options to bulk assign permissions.
4. Changes are saved after clicking on the Save button and particular permissions are assigned to specific Role

Screenshot of Role Permission Mapping Page:



The screenshot shows a table-based interface for managing role permissions. The table has columns for Sr NO., Name, and four action permissions: Read, Create, Update, and Delete. Each row contains a toggle switch for each permission. There are also global 'Select All Permissions' and 'Select All Master' buttons at the top. The data in the table is as follows:

Sr NO.	Name	Read	Create	Update	Delete
1	80/20 Customer (Master)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	80/20 Product (Master)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Application (Master)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Audit Logs	<input checked="" type="checkbox"/>			
5	Common Dashboard	<input checked="" type="checkbox"/>			
6	Currency (Master)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	Custom Forms (Master)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	Customer (Master)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9	Customer Dashboard	<input checked="" type="checkbox"/>			
10	Delayed Reason (Master)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

User Management

Login to MyIDEX HUB and from the left side menu, click on 'Users'. Under the 'User' section to view the list of existing users.

1. Introduction

This document outlines the standard operating procedure (SOP) for managing users in the MyIDEX HUB system. It includes steps for listing users, adding new users, and understanding the functionality of each icon present in the user interface.

User are Divided into 3 parts:

- 1.Internal User Section**
- 2.Customer User Section**
- 3.Distributor User Section**

Internal and Distributor users are created from the same "Add User" page. The user is categorized based on the selected role — if the role is "Distributor", the user appears in the Distributor listing page; otherwise, the user is listed under Internal users.

2. User Listing Page

The user listing page provides a comprehensive overview of all internal users. Below is a screenshot of the user listing interface.

rNo.	First Name	Last Name	Email	AddedBy	Added At	UpdatedBy	Updated At	Role Name	BU	User Status	Action
1	Prajwal	Raut	prau1@idexcorp.com	Amit Patwardhan	04-04-2025, 2:0...	-	04-04-2025, 2:0...	Procurement, Plan...	Matcon India, Quad...	Mail Sent	
2	Sanket	Shah	SPShah@idexcorp.com	Amit Patwardhan	04-04-2025, 2:0...	-	04-04-2025, 2:0...	Engineering	Matcon India, Quad...	Mail Sent	
3	Kiran	Rathod	KiranR@idexcorp.com	Amit Patwardhan	04-04-2025, 2:0...	-	04-04-2025, 2:0...	Sales	Quadro India	Mail Sent	
4	Dilip	Patkar	DPatkar@idexcorp.com	Amit Patwardhan	04-04-2025, 2:0...	-	04-04-2025, 2:0...	Sales	Quadro India	Mail Sent	
5	Rupinder	Raju	raj@idexcorp.com	Amit Patwardhan	04-04-2025, 2:0...	-	15-04-2025, 13:2...	Sales	Quadro India	Registered	
6	Somneshwar	Patil	SPatil@idexcorp.com	Amit Patwardhan	04-04-2025, 15:9...	-	04-04-2025, 15:9...	Sales	Quadro India	Mail Sent	
7	Gaurav	Gada	GDGada@idexcorp.com	Amit Patwardhan	04-04-2025, 15:8...	-	14-04-2025, 3:32...	Sales	Quadro India	Registered	
8	Dhaval	Joshi	DJoshi@idexcorp.com	Amit Patwardhan	04-04-2025, 15:8...	-	04-04-2025, 15:8...	Service Application	Matcon India, Quad...	Mail Sent	
9	Kuldeep	Mochi	KMochi@idexcorp.com	Amit Patwardhan	04-04-2025, 15:7...	-	04-04-2025, 15:7...	Service Application	Matcon India, Quad...	Mail Sent	
10	Amit	Patel	apatel@idexcorp.com	Amit Patwardhan	04-04-2025, 15:4...	-	04-04-2025, 15:4...	Procurement, Plan...	Quadro India	Mail Sent	

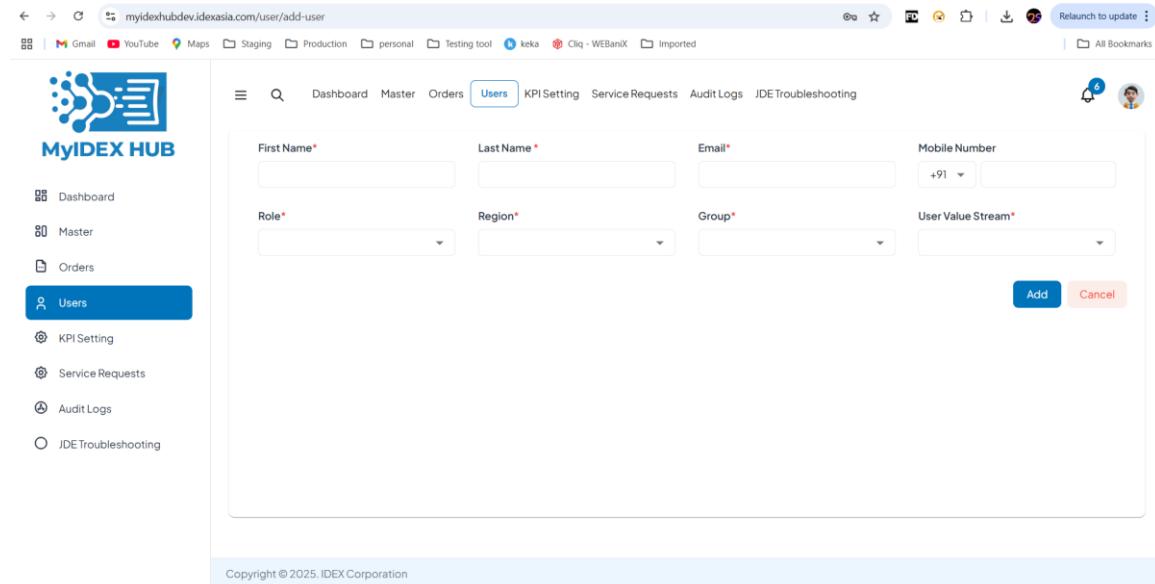
The following icons are used on this page:

- Lock icon: Indicates whether a user is active or inactive.
- Email box icon: Used to resend the registration mail to the user.
- User icon: Opens the permission settings for the selected user.
- Arrow icon: Used to transfer assets to another user.
- Edit icon: Allows editing of the existing user's information.

- Delete icon: Deletes the user from the system.

3. Add User Page

To add a new user, navigate to the 'Add User' page. This page contains a form that requires user details to be filled in. Below is a screenshot of the form.



The screenshot shows the 'Add User' page of the MyIDEX HUB. The URL in the browser is myidexhubdev.idexasia.com/user/add-user. The left sidebar has a 'Users' tab selected, which is highlighted in blue. The main form contains fields for First Name*, Last Name*, Email*, Mobile Number, Role*, Region*, Group*, and User Value Stream*. There are 'Add' and 'Cancel' buttons at the bottom right of the form. The top navigation bar includes links for Dashboard, Master, Orders, KPI Setting, Service Requests, Audit Logs, and JDE Troubleshooting.

Mandatory fields to be filled:

- First Name
- Last Name
- Email
- Role
- Region
- Group
- User Value Stream

NOTE : The dropdowns for 'Role', 'Region', 'Group', and 'User Value Stream' are dynamically populated from their respective master lists.

When creating Admin L1:

- 1) All groups and Business Units (BUs) are automatically selected.
- 2) The user can only select the region.

When creating Admin L2 from Admin L1:

- 1) The region and groups can be selected by the user.
- 2) All Business Units (BUs) are selected by default.

When creating Admin L3 from Admin L1:

- 1) The region, groups, and BUs will be selected by the user.

When creating Admin L3 from Admin L2:

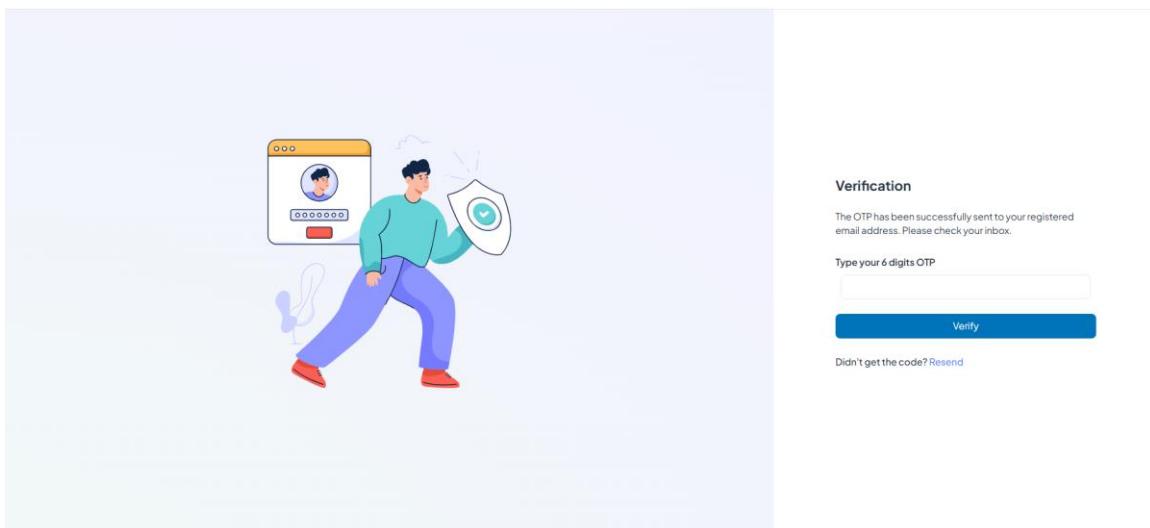
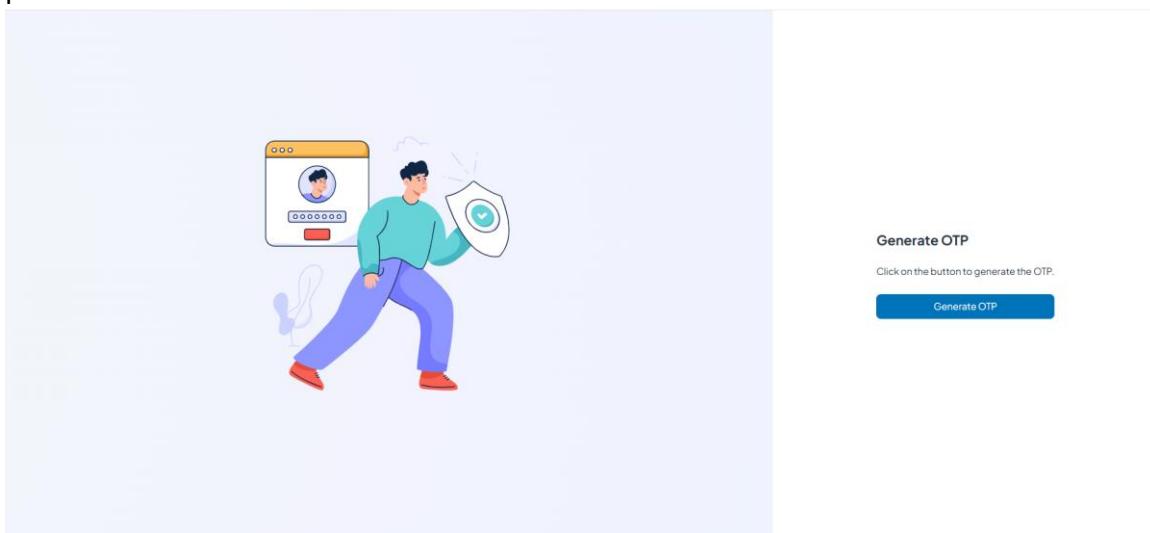
- 1) The region is selected by default.
- 2) Groups and Business Units (BUs) are selected by user.

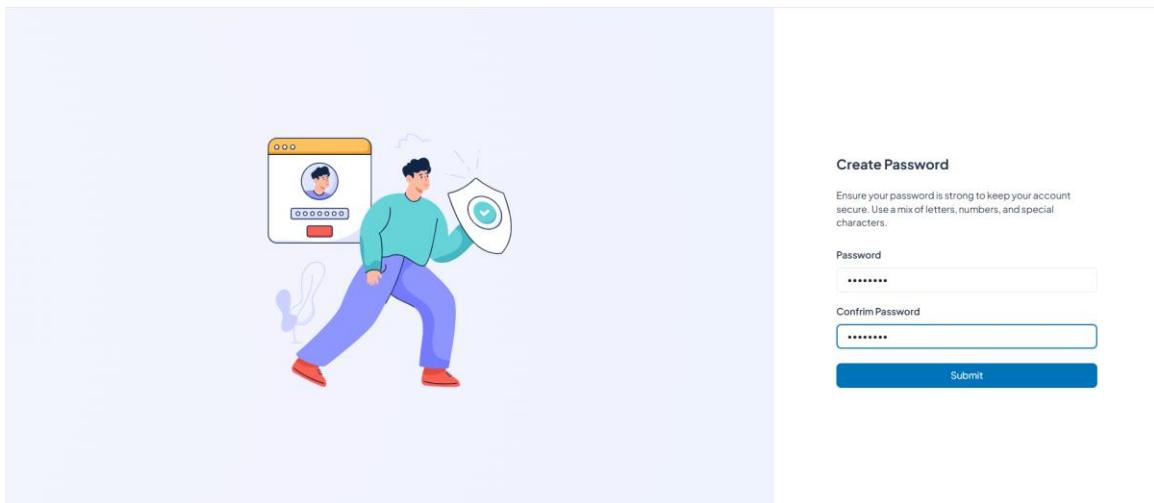
When any user is created by Admin L3:

- 1) The region and groups are automatically selected.
- BU's will be selected by the user.

After a user is created, the system sends an email to the user's registered email address.

The email contains a user registration link. By clicking this link, the user can set their password via OTP verification.

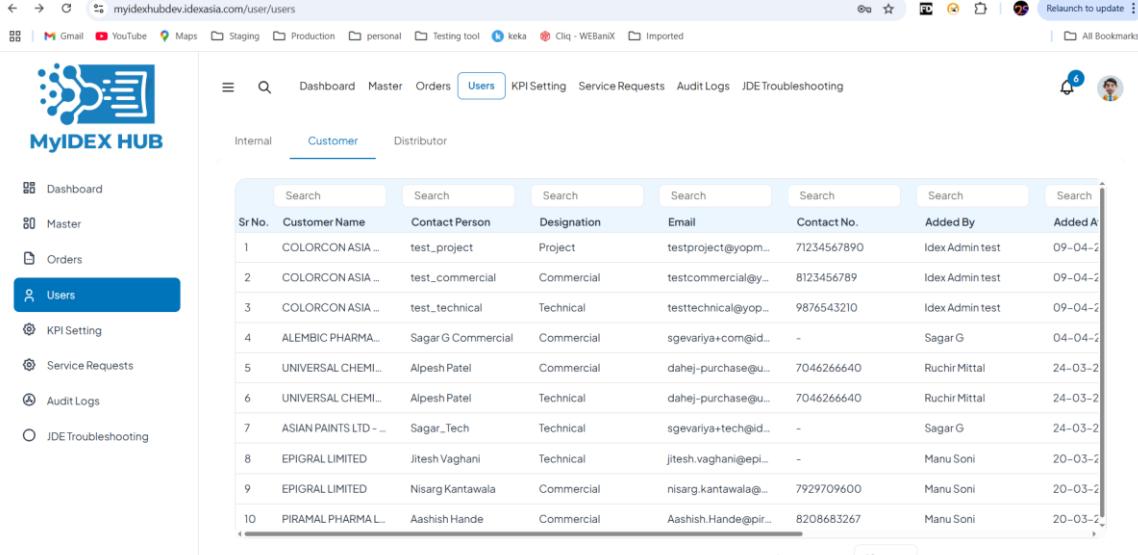




Customer User Section

Customer users are fetched from the **Customer Master**. Each customer entry in the system includes three types of contact persons:

1. Technical Contact Person
2. Commercial Contact Person
3. Project Contact Person



Sr.No.	Customer Name	Contact Person	Designation	Email	Contact No.	Added By	Added At
1	COLORCON ASIA ...	test_project	Project	testproject@yopm...	71234567890	Idex Admin test	09-04-2
2	COLORCON ASIA ...	test_commercial	Commercial	testcommercial@u...	8123456789	Idex Admin test	09-04-2
3	COLORCON ASIA ...	test_technical	Technical	testtechnical@yop...	9876543210	Idex Admin test	09-04-2
4	ALEMBIC PHARMA...	Sagar G Commercial	Commercial	sgevariya+com@id...	-	Sagar G	04-04-2
5	UNIVERSAL CHEMI...	Alipesh Patel	Commercial	dahej-purchase@u...	7046266640	Ruchir Mittal	24-03-2
6	UNIVERSAL CHEMI...	Alipesh Patel	Technical	dahej-purchase@u...	7046266640	Ruchir Mittal	24-03-2
7	ASIAN PAINTS LTD - ...	Sagar_Tech	Technical	sgevariya+tech@id...	-	Sagar G	24-03-2
8	PIGRAL LIMITED	Jitesh Vaghani	Technical	jitesh.vaghani@epi...	-	Manu Soni	20-03-2
9	PIGRAL LIMITED	Nisarg Kantawala	Commercial	nisarg.kantawala@...	7929709600	Manu Soni	20-03-2
10	PIRAMAL PHARMAL...	Aashish Hande	Commercial	Aashish.Hande@pir...	8208683267	Manu Soni	20-03-2

Pre Defined Field Master

This SOP outlines the steps to add a Pre Defined Field in the MyIDEX HUB platform. The feature is found under the 'Master' section of the application and is used to manage custom fields that can be utilized across various modules.

Steps to Add a Pre Defined Field

1. Navigate to the "Master" menu from the left-side panel.
2. Click on the "Pre Defined Field" tab located in the top navigation bar.
3. Use the input section titled "Add Pre Defined Field" to add new entries.
4. Fill in the following details:
 - Enter Label - The name for the new field.
 - Select Field Type - Choose the type (e.g., textarea, number, checkbox, etc.).
 - Select Data Type - Choose the data type this field is associated with.
 - (Custom Form , OI Filter , Template)

NOTE : There are 2 Cases while selecting Data Types :

Case 1: When we select Custom Forms then the predefined field will appear in Custom Forms Master

Case 2: When we select Templates then the predefined field will appear in Template Master

5. Optionally, choose the Grouping Type if applicable.(SO fields, OI form etc.)
6. Click the blue "Add" button to save the new field.
7. The new entry will be listed in the table below once successfully added.
8. To edit an existing entry, click the pencil (edit) icon under the 'Action' column.
9. To delete an entry, click the trash (delete) icon under the 'Action' column.

← → ⌛ myidexhubdev.idexasia.com/user/custom-field

Gmail YouTube Maps Staging Production personal Testing tool keka Cliq - WEBanIX Imported All Bookmarks

Dashboard Master Orders Users KPI Setting Service Requests Audit Logs JDE Troubleshooting

Workflow Template Pre Defined Field Internal Stage Custom Forms Customer Value Stream Groups Region Roles Application

Search Pre Defined Field

Add Pre Defined Field

Sr No.	Label	Field Type	Data Type	Action
1	Remarks - GAD Submission to Customer	textarea	custom_form, template	
2	Remarks - FAT Intimation to Customer	textarea	custom_form, template	
3	FAT Date	datetime	custom_form	
4	Remarks - Before Dispatch PFI	textarea	custom_form, template	
5	Remarks - Advance Payment Receipt	textarea	custom_form, template	
6	Remarks - Advance PFI	textarea	custom_form, template	
7	Remarks - Sales Order Booking and SO Submission	textarea	custom_form, template	
8	Remarks - PO and Order Booking Handover	textarea	custom_form, template	
9	Remarks - Dispatch Intimation	textarea	custom_form, template	
10	Remarks - PI Submission Before Dispatch	textarea	custom_form, template	

Template Master

Step 1: Navigate to Template Section

Login to MyIDEX HUB and from the left side menu, click on 'Master'. Then select 'Template' under the 'Master' section to view the list of existing templates.

The screenshot shows the 'Template' section of the MyIDEX HUB interface. On the left, there's a sidebar with links for Dashboard, Master (which is selected), Orders, Users, KPI Setting, Service Requests, Audit Logs, and JDE Troubleshooting. The main area has tabs for Workflow, Template (which is selected), PreDefinedField, Internal Stage, Custom Forms, Customer, Value Stream, Groups, Region, Roles, Application, Document List, OrderType, and Nature. A search bar labeled 'Search Template' is at the top. Below it is a table with columns: Sr No., Name, Subject, Applicable BU, and Action. The table lists 10 templates, each with a subject line containing placeholders like '(Machine Serial Number)', '(Customer name-Customer Info)', and '(PO: (Customer PO number -Customer PO))'. The 'Applicable BU' column shows 'Quadro India' or 'IDEX TEST BU, Quadro India'. The 'Action' column contains icons for edit, delete, and preview.

Sr No.	Name	Subject	Applicable BU	Action
1	QDO Machine Dispatch Confirmation	Machine Dispatch Confirmation (Machine Serial Number) (Customer name-Customer Info) PO: (Customer PO number -Customer PO)	Quadro India	
2	QDO Before Dispatch PFI	Before Dispatch PFI (Machine Serial Number) (Customer name-Customer Info) PO: (Customer PO number -Customer PO)	Quadro India	
3	QDO Advance Payment Receipt	Advance Payment Receipt (Machine Serial Number) (Customer name-Customer Info) PO: (Customer PO number -Customer PO)	Quadro India	
4	QDO Advance Payment PFI	Advance Payment (Machine Serial Number) (Customer name-Customer Info) PO: (Customer PO number -Customer PO)	Quadro India	
5	QDO Sales Order Booking and SO Submission	SO Booking (Machine Serial Number) (Customer name-Customer Info) PO: (Customer PO number -Customer PO)	Quadro India	
6	QDO PO and Order Booking Handover	Order Booking Handover (Machine Serial Number) (Customer name-Customer Info) PO: (Customer PO number -Customer PO)	Quadro India	
7	QDO PO and Order Handover	PO and Order Handover (Customer name-Customer Info) PO: (Customer PO number -Customer PO)	Quadro India	
8	QDO Dispatch Intimation	Dispatch Intimation (Machine Serial Number) (Customer name-Customer Info) PO: (Customer PO number -Customer PO)	IDEX TEST BU, Quadro India	
9	QDOPISSubmissionBeforeDispatch	Proforma Invoice before Dispatch (Machine Serial Number) (Customer name-Customer Info) PO: (Customer PO number -Customer PO)	IDEX TEST BU, Quadro India	
10	QDO Payment Receipt	Payment Receipt (Machine Serial Number) (Customer name-Customer Info) PO: (Customer PO number -Customer PO)	Quadro India	

Step 2: Add New Template

Click on the 'Add Template' button on the top right corner to create a new template.

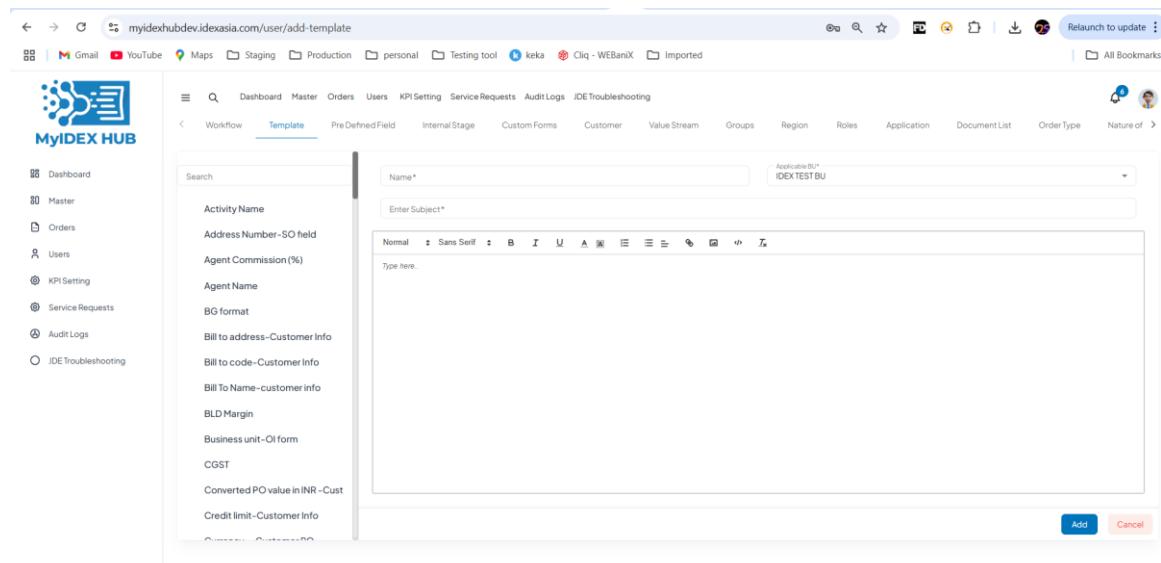
Step 3: Fill Template Details

Enter the Name and Subject of the template and select Applicable BU from the dropdown list .

Step 4: Predefined Field Master Reference

The left panel shows the fields which are maintained under 'Pre Defined Field'. These fields are used as placeholders and can be dragged and dropped into the template editor.

NOTE : These placeholder are replaced by the actual value related to the Order.



Step 5: Edit or Delete Template

To edit a template, click the pencil (edit) icon next to the respective template row. To delete a template, click the trash (delete) icon. Only authorized users can perform these actions.

Custom Form Master

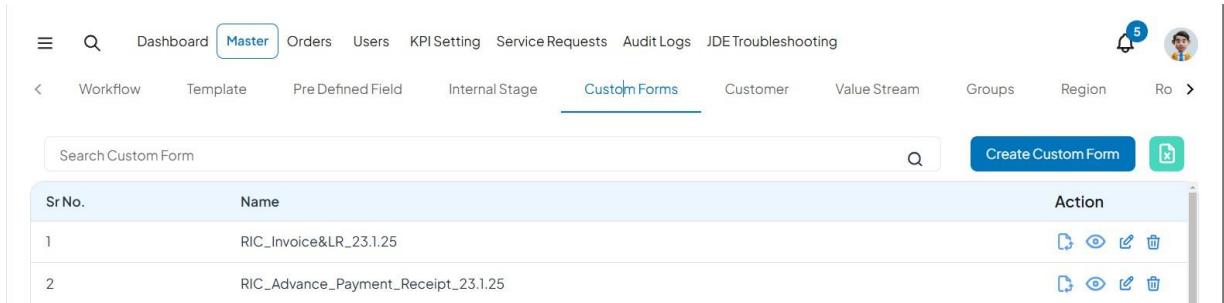
This SOP provides detailed instructions for creating a custom form. Following these steps ensures consistency and efficiency in form development.

Login to MyIDEX HUB and from the left side menu, click on 'Master'. Under the 'Master' section click on the Custom forms.

Step-by-Step Instructions

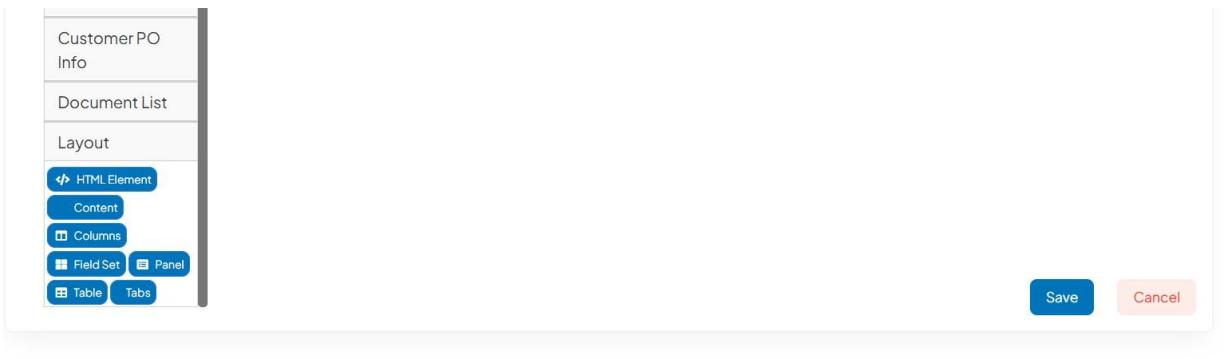
Step 1: Insert a Panel

1. Open the Custom Form Master under Masters tab.

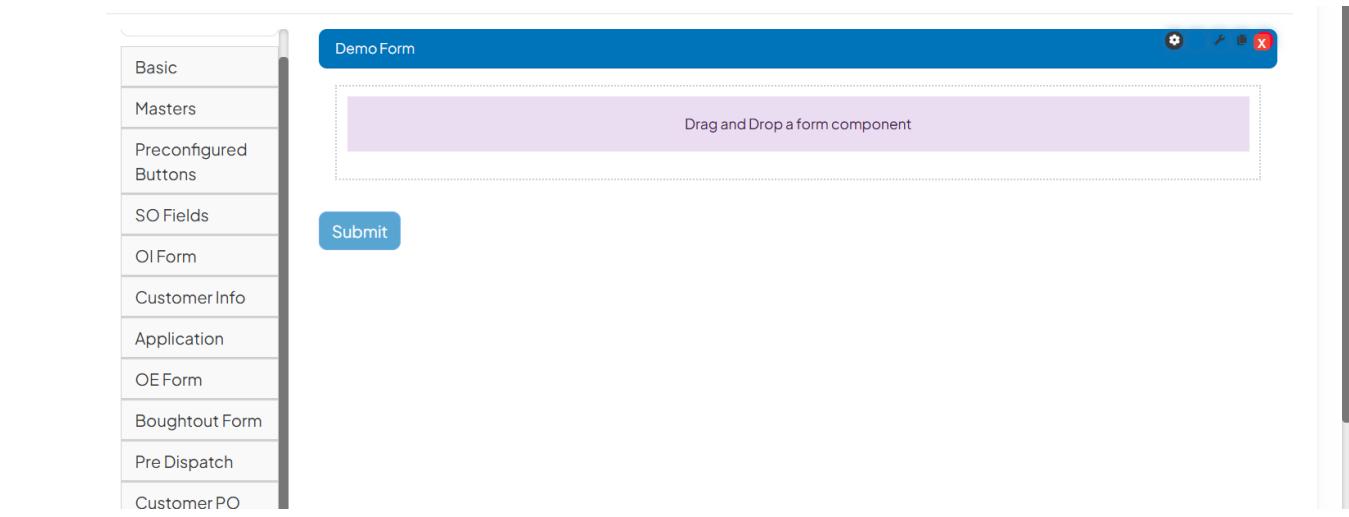


Sr No.	Name	Action
1	RIC_Invoice&LR_23.1.25	
2	RIC_Advance_Payment_Receipt_23.1.25	

2. Navigate to the **Layout** tab on the left panel.



3. Drag and drop a **Panel** component into the form workspace.

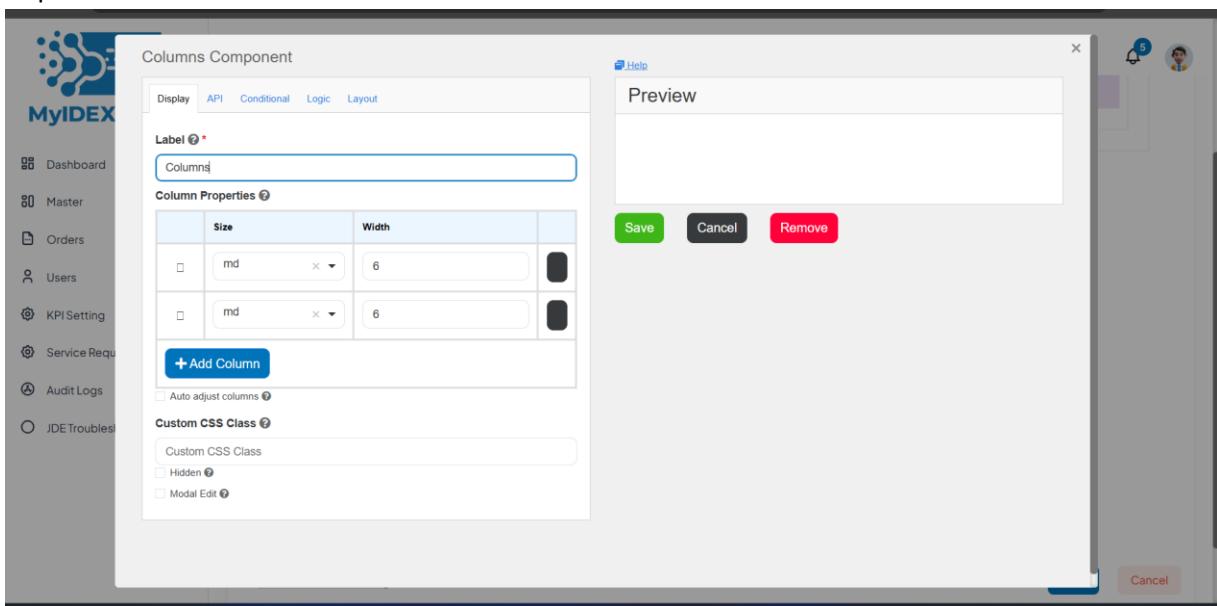


Step 2: Insert Input Controls

For Multiple Input Fields:

1. Navigate to the **Layout** tab.
2. Drag and drop a **Columns** component into the panel.
3. Set the number of divisions (columns) as per the requirement.
4. Adjust the width of each column (e.g., 6-6 for two equal columns, 4-4-4 for three equal columns).

5. Drag and drop the required input fields (Text Field, Number, Select, etc.) into the respective columns.



6. Configure each input field:
 - o **Label:** Set a meaningful name.
 - o **Key:** Do not do any changes in key
 - o **Validation:** Define required rules (mandatory, min/max length, etc.).
7. Click **Save** for each component.

For a Single Input Field:

1. Even if inserting only one input field, first insert a **Columns** component.
 2. Set the column width to **12** to span the entire form width.
 3. Drag and drop the desired input field into the column.
 4. Configure the input field as needed (label, key, validation, etc.).
 5. Click **Save** to apply the settings.
-

Step 3: Insert Buttons

1. Navigate to the **Basic** tab in the left panel.
 2. Drag and drop a **Button** component directly into the panel (with or without a column container).
-

Step 4: Save and Test the Form

1. Click the **Save Form** button to store all changes.
2. Preview the form by clicking the **Preview** button.

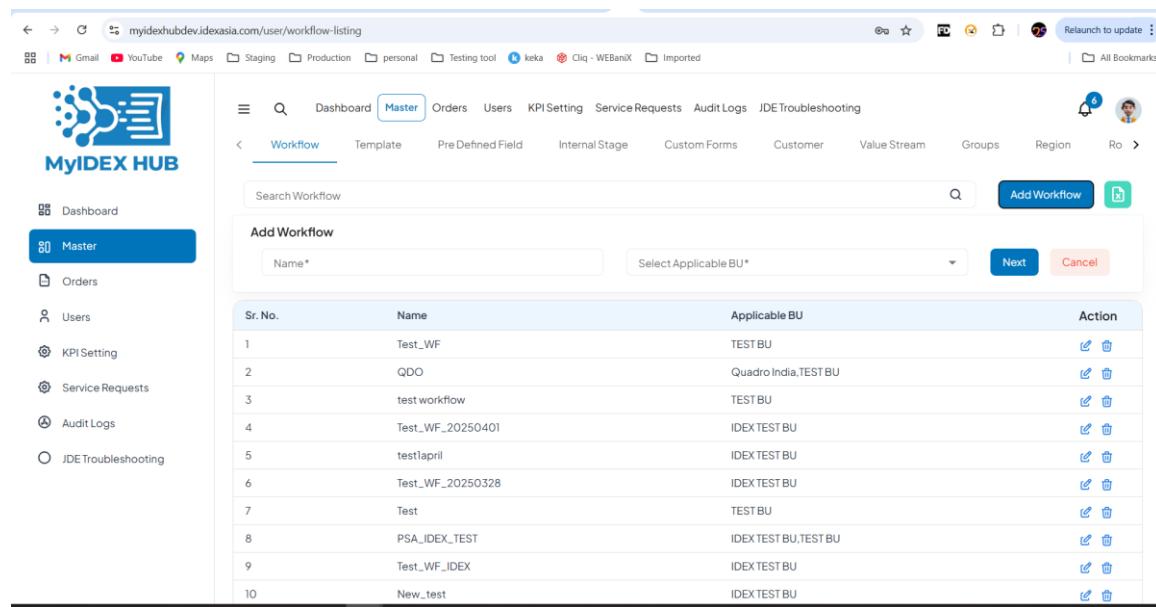
WorkFlow Master

This Standard Operating Procedure (SOP) provides steps for managing workflow data in the MyIDEX HUB platform. It includes the process for adding, editing, and deleting entries in the workflow section under the Master module.

Login to MyIDEX HUB and from the left side menu, click on 'Master'. Then select 'Workflow' under the 'Master' section to view the list of existing workflow.

1. Workflow Listing Page

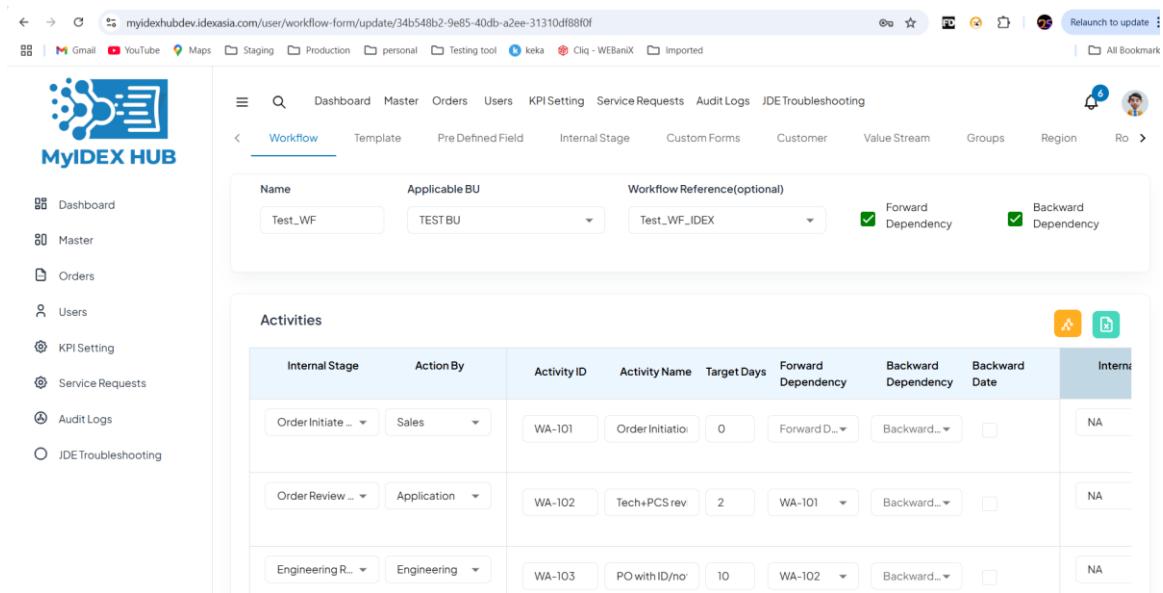
This section allows users to view and manage existing workflows. Users can search workflows, add new workflows, and edit or delete existing ones.



Sr. No.	Name	Applicable BU	Action
1	Test_WF	TEST BU	
2	QDO	Quadro India,TEST BU	
3	test workflow	TEST BU	
4	Test_WF_20250401	IDEX TEST BU	
5	testlapril	IDEX TEST BU	
6	Test_WF_20250328	IDEX TEST BU	
7	Test	TEST BU	
8	PSA_IDEX_TEST	IDEX TEST BU,TEST BU	
9	Test_WF_IDEX	IDEX TEST BU	
10	New...test	IDEX TEST BU	

2. Workflow Form Page

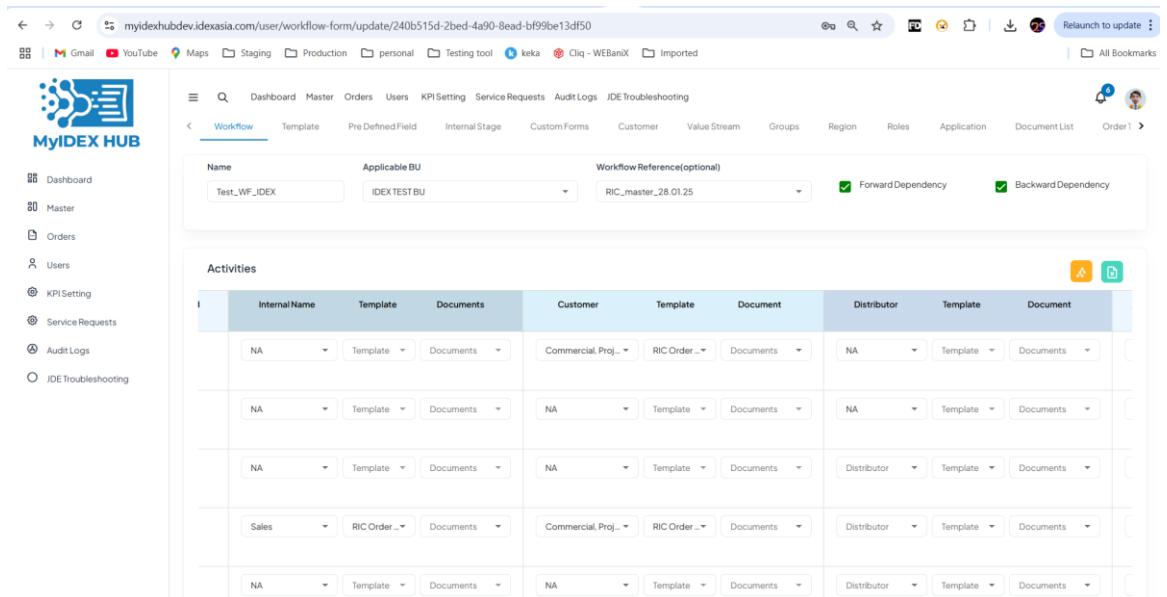
This section is used for creating or updating workflow details including associated business unit(multiple), reference workflow, and defining activity steps.



The screenshot shows the 'Workflow' configuration screen in the MyIDEX HUB application. The main header includes the IDEX logo, a search bar, and navigation links for Dashboard, Master, Orders, Users, KPI Setting, Service Requests, Audit Logs, JDE Troubleshooting, and a user profile. The left sidebar lists various modules: Dashboard, Master, Orders, Users, KPI Setting, Service Requests, Audit Logs, and JDE Troubleshooting. The central workspace displays a workflow setup with fields for Name (Test_WF), Applicable BU (TEST BU), Workflow Reference (optional) (Test_WF_IDEX), and dependency checkboxes for Forward and Backward Dependency. Below this is a detailed 'Activities' section with three rows of data:

Internal Stage	Action By	Activity ID	Activity Name	Target Days	Forward Dependency	Backward Dependency	Backward Date	Internal
Order Initiate ...	Sales	WA-101	Order Initiatio...	0	Forward D...	Backward...		NA
Order Review ...	Application	WA-102	Tech+PCS rev...	2	WA-101	Backward...		NA
Engineering R...	Engineering	WA-103	PO with ID/no...	10	WA-102	Backward...		NA

- Workflow Reference represents taking another workflow as a reference.
- Forward Dependency and Backward Dependency check represents that both dependencies column are appearing on activities section.
- In the Activities section:
 - **Internal Stage** : Internal Stage dropdown is populated from the Internal Stage master.
 - **Action By** :- Action By dropdown is populated from the Role master.
 - **Activity ID**:- Activity ID is auto-generated sequentially (e.g., 101, 102...).
 - **Activity Name**: - Activity Name is an input field where users enter the activity name.
 - **Target Days**:- Target Days indicates the number of days required to complete the activity.
 - **Forward Dependency**: - Forward Dependency defines which activity should follow the current one.
 - **Backward Dependency**: - Backward Dependency is used to calculate the target date of the selected activity in a bottom-to-top flow.
 - **Backward Date check** : This field Represents that from which activity the backward calculation should start.



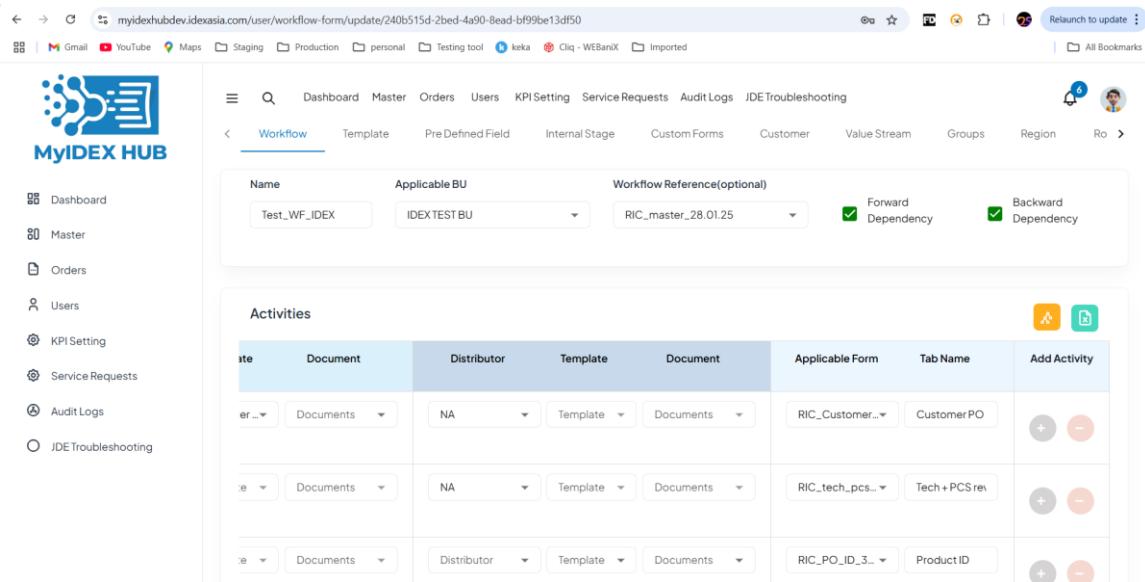
The screenshot shows the 'Workflow' tab selected in the top navigation bar. The main form has the following fields:

- Name:** Test_WF_IDEX
- Applicable BU:** IDEX TEST BU
- Workflow Reference(optional):** RIC_master_28.01.25
- Forward Dependency:** Checked
- Backward Dependency:** Checked

The 'Activities' section contains a table with six rows, each representing an activity with columns for Internal Name, Template, Documents, Customer, and Distributor.

	Internal Name	Template	Documents	Customer	Template	Document	Distributor	Template	Document
1	NA	Template	Documents	Commercial_Proj..	RIC Order ..	Documents	NA	Template	Documents
2	NA	Template	Documents	NA	Template	Documents	NA	Template	Documents
3	NA	Template	Documents	NA	Template	Documents	Distributor	Template	Documents
4	Sales	RIC Order ..	Documents	Commercial_Proj..	RIC Order ..	Documents	Distributor	Template	Documents
5	NA	Template	Documents	NA	Template	Documents	Distributor	Template	Documents

- There are three sections: **Internal**, **Customer**, and **Distributor**.
- **Internal :**
 - Populated from the Role Master.
 - Excludes roles: AdminL1, AdminL2, AdminL3, and Distributor.
- **Customer :**
 - Includes internal users.
 - Includes all three types of contact persons from the Customer Master:
 - Technical Contact Person
 - Commercial Contact Person
 - Project Contact Person
- **Distributor :**
 - Includes internal users.
 - Includes distributor names.
- All three sections (**Internal**, **Customer**, and **Distributor**) contain two common fields:
 - **Template** (fetched from Template Master)
 - **Document List** (fetched from Document List Master)
- These three sections are used to define:
 - Which users will receive an specific **email** when a particular activity is completed.
 - The **selected email template** and **documents** will be sent to the users defined in these sections.



Name	Applicable BU	Workflow Reference(optional)			Forward Dependency	Backward Dependency
Test_WF_IDEX	IDEXTEST BU	RIC_master_28.01.25			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

State	Document	Distributor	Template	Document	Applicable Form	Tab Name	Add Activity
er ...	Documents	NA	Template	Documents	RIC_Customer...	Customer PO	+ -
re ...	Documents	NA	Template	Documents	RIC_tech_pcs...	Tech + PCS rev	+ -
re ...	Documents	Distributor	Template	Documents	RIC_PO_ID_3...	Product ID	+ -

- **Applicable Form List:**
 - Appears from the **Custom Form Master**.
 - Used to specify which form is selected for a particular activity stage in **Orders**.
- **Tab Name:**
 - Represents the name of the tab for a specific activity.
 - This tab name is displayed when an order is created.
- **Add Activity Symbols (+ / -):**
 - "+" (**Plus**) symbol is used to **add** a new activity to the workflow.
 - "-" (**Minus**) symbol is used to **remove** an activity from the workflow.
- **Yellow Button (Top Right Corner):**
 - Used to **preview the flowchart** of the workflow.
- **Green Button (Top Right Corner):**
 - Used to **download** all workflow data in **Excel format**.

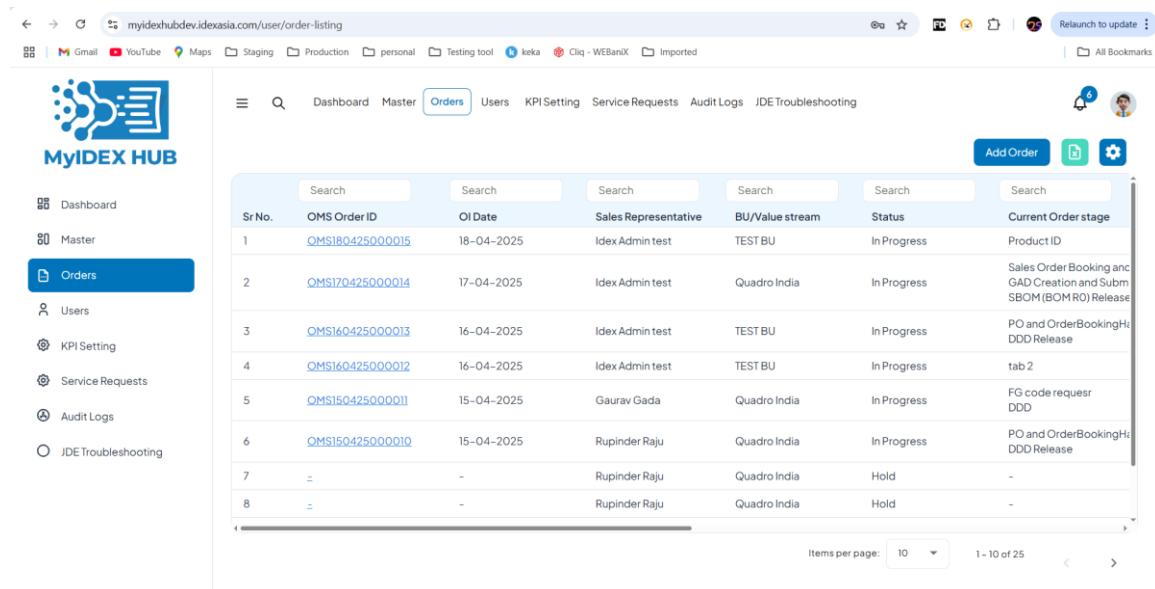
Order Creation & Listing

This Standard Operating Procedure (SOP) provides steps for managing Orders data in the MyIDEX HUB platform. It includes the process for adding, editing, and deleting entries in the Order section.

Login to MyIDEX HUB and from the left side menu, click on 'Order'. Under the 'Order' section to view the list of existing order.

1. Order Listing Page

Below is the screenshot of the Order Listing Page:

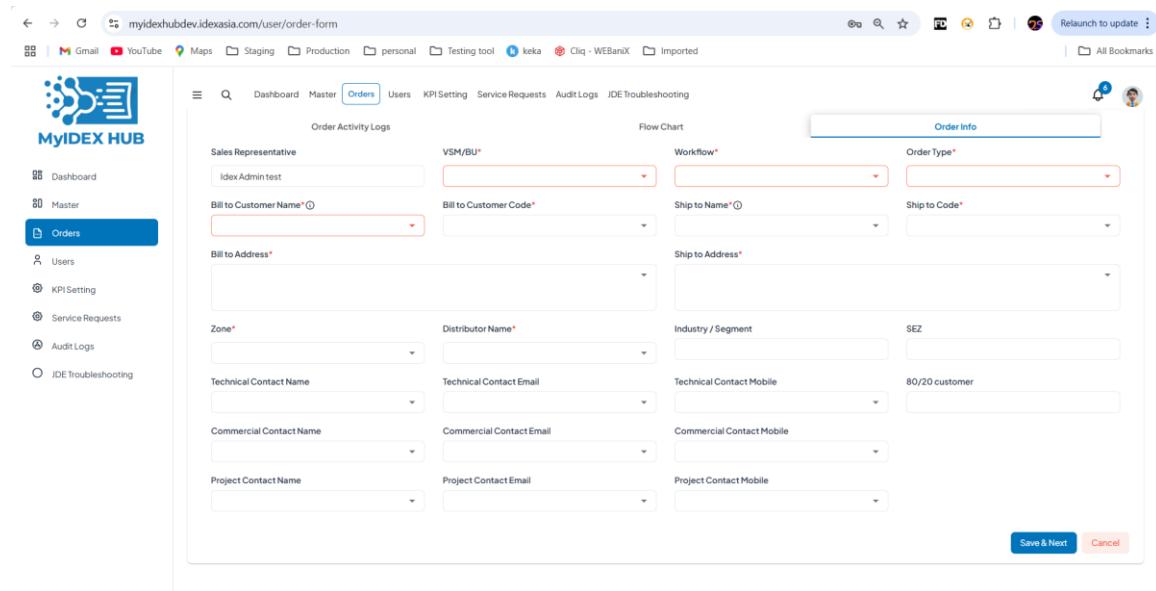


Sr No.	OMS Order ID	OI Date	Sales Representative	BU/Value stream	Status	Current Order stage
1	OMS180425000015	18-04-2025	Idex Admin test	TEST BU	In Progress	Product ID
2	OMS170425000014	17-04-2025	Idex Admin test	Quadro India	In Progress	Sales Order Booking and GAD Creation and Subm SBOM (BOM RO) Release
3	OMS160425000013	16-04-2025	Idex Admin test	TEST BU	In Progress	PO and OrderBookingHi DDD Release
4	OMS160425000012	16-04-2025	Idex Admin test	TEST BU	In Progress	tab 2
5	OMS150425000011	15-04-2025	Gaurav Gada	Quadro India	In Progress	FG code request DDD
6	OMS150425000010	15-04-2025	Rupinder Raju	Quadro India	In Progress	PO and OrderBookingHi DDD Release
7	-	-	Rupinder Raju	Quadro India	Hold	-
8	-	-	Rupinder Raju	Quadro India	Hold	-

- The gear (settings) icon allows the user to customize the visible columns on the order listing page.
- Columns such as **OMS Order ID, OI Date, Sales Representative, BU/Value Stream, Status, and Current Order Stage** can be selected or deselected to display as per user preference.
- Click on the Add order Button for new order creation

2. Order Creation Form

Below is the screenshot of the Order Creation Form:

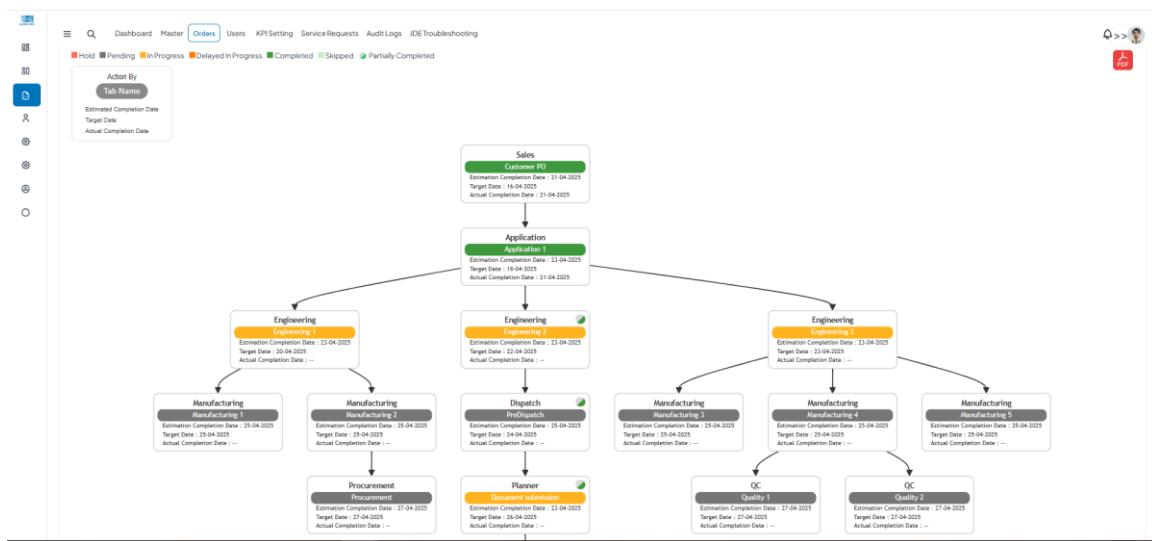


The screenshot shows the 'Orders' section of the MyIDEX HUB application. The left sidebar has a navigation menu with 'Orders' selected. The main area contains several input fields and dropdown menus for creating an order. The 'Order Info' tab is active, displaying fields for Sales Representative, VSM/BU, Workflow, Order Type, Bill to Customer Name, Bill to Customer Code, Ship to Name, Ship to Code, Bill to Address, Ship to Address, Zone, Distributor Name, Industry / Segment, SEZ, Technical Contact Name, Technical Contact Email, Technical Contact Mobile, Commercial Contact Name, Commercial Contact Email, Commercial Contact Mobile, Project Contact Name, Project Contact Email, and Project Contact Mobile. At the bottom right of the form are 'Save & Next' and 'Cancel' buttons.

- **Sales Representative** – Indicates the person who created the order. Typically, this should be a user with the sales role.
- **VSM/BU** – A dropdown list that displays all value streams. It specifies the Business Unit under which the order is created.
- **Workflow** – Dropdown showing all workflows associated with the selected BU.
- **Order Type** – The available list comes from the Order Type Master.
- **Bill to Customer Name** – Populated from the Customer Master. Upon selecting a Bill to name, **Bill to Customer Code** and **Bill to Address** fields are automatically filled, and vice versa.
- **Ship to Name** – Also sourced from the Customer Master. Selecting a name automatically fills in the **Ship to Code** and **Ship to Address** fields.
- Based on the Ship to Name selected, the system auto-fills details for **Project Contact Person**, **Commercial Contact Person**, and **Technical Contact Person** (including their Name, Email, and Contact Number).
- **Zone** – Values are fetched from the Zone Master.
- **Distributor Name** – Shows only users with the 'Distributor' role under the selected BU.
- **Industry / Segment, SEZ, and 80/20 Customer** – These fields are auto-populated based on the selected Ship to Name.

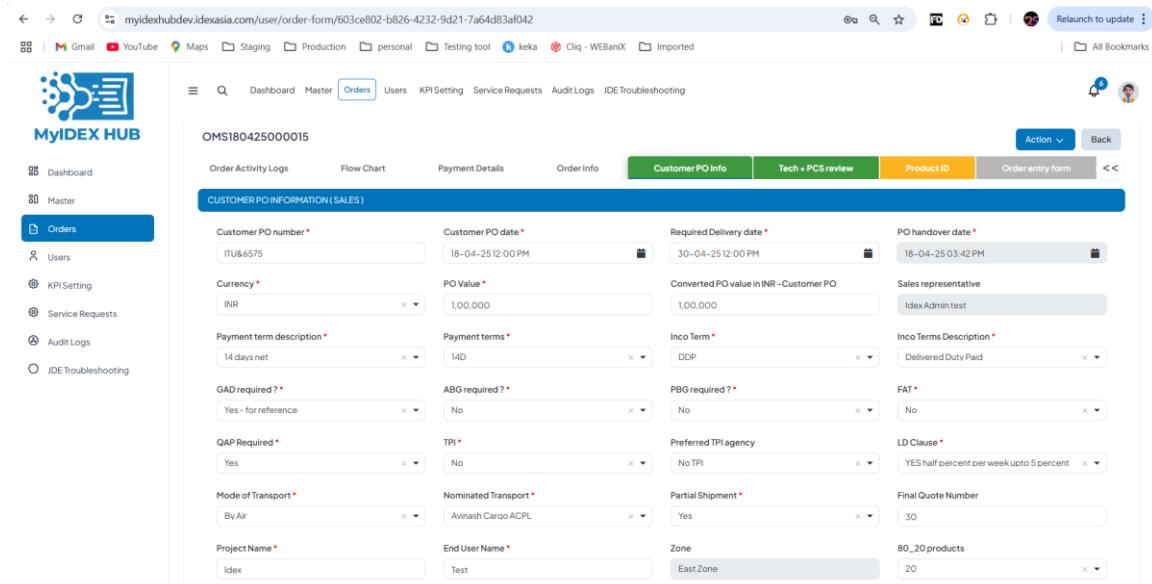
3. Flowchart of order Wokflow

A **flowchart** is a **visual diagram** that represents the **sequence of steps or activities** in a process. It uses **symbols** to show the flow of actions, decisions, and events from **start to finish**.



- Hold:** Indicates that the order is currently on hold. All *In Progress* activities are highlighted in red.
- Pending:** Indicates that the activities are yet to begin. The activity color is gray.
- In Progress:** Indicates that activities are currently ongoing. The activity color is yellow.
- Delayed In Progress:** Indicates that the activity has passed its estimated completion date. The activity color is orange.
- Completed:** Indicates that the activity is fully completed. The activity color is green.
- Skipped:** Indicates that the activity was skipped due to certain reasons. The activity color is light green.
- Partially Completed:** Indicates that the activity has been partially submitted. The activity icon shows a half white and half green circle.
- On the top right side corner there is PDF icon for download flowchart in pdf format.**

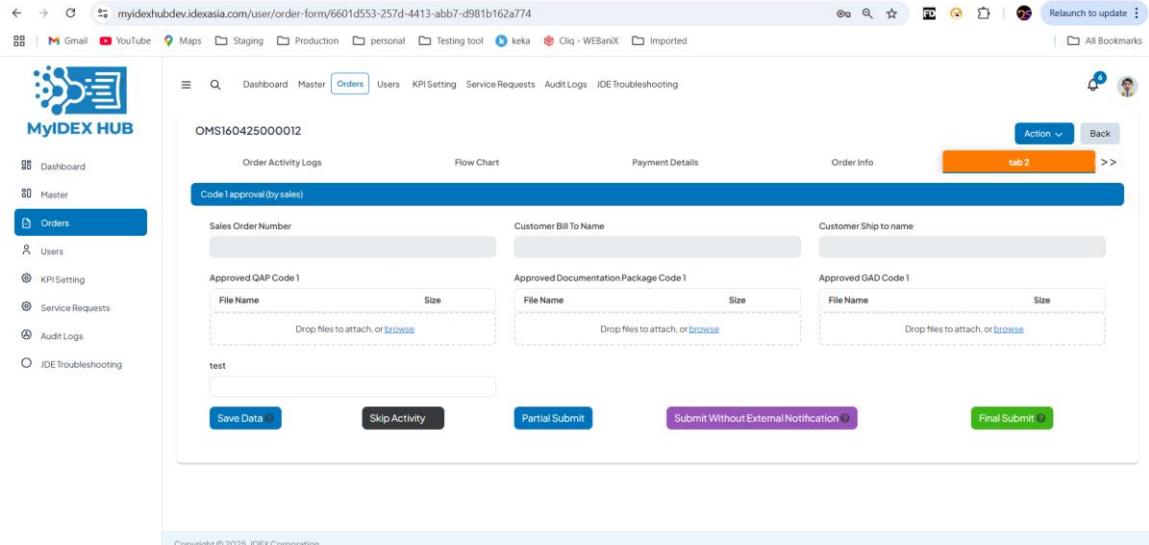
4. Order's Activity Stage section



The screenshot shows the Order Activity Log section of the MyIDEX HUB. The main header includes the MyIDEX HUB logo, navigation links (Dashboard, Master, Orders, KPI Setting, Service Requests, Audit Logs, JDE Troubleshooting), and a search bar. Below the header, there are tabs for Order Activity Logs, Flow Chart, Payment Details, Order Info, Customer PO Info (selected), Tech + PCS review, Product ID, and Order entry form. The Customer PO Info tab displays detailed information for OMS180425000015, including:

- CUSTOMER PO INFORMATION (SALES):**
 - Customer PO number: ITU&575
 - Customer PO date: 18-04-25 12:00 PM
 - Required Delivery date: 30-04-25 12:00 PM
 - PO handover date: 18-04-25 03:42 PM
 - Currency: INR
 - PO Value: 1,00,000
 - Converted PO value in INR -Customer PO: 1,00,000
 - Sales representative: iDEX Admin test
 - Payment term description: 14 days net
 - Payment terms: 14D
 - Inco Term: DDP
 - Inco Terms Description: Delivered Duty Paid
 - GAD required?: Yes - for reference
 - ABG required?: No
 - PBG required?: No
 - FAT?: No
 - QAP Required?: Yes
 - TPI?: No
 - Preferred TPI agency: No TPI
 - LD Clause?: YES half percent per week upto 5 percent
 - Mode of Transport: By Air
 - Nominated Transport: Avinash Cargo ACPL
 - Partial Shipment?: Yes
 - Final Quote Number: 30
 - Project Name: iDEX
 - End User Name: Test
 - Zone: East Zone
 - 80_20 products: 20

- **OMS ID** is displayed in the top-left corner of the screen. It appears after the **first activity** of the order is submitted.
- The **top slide bar** displays the **Tab names** of all the different activities that were defined during **workflow creation**. These tabs also indicate their **current status** such as *Complete, In Progress, Pending, etc.*
- Each **Tab** represents a different **activity stage**, which is configured in the **Custom Form Master**.

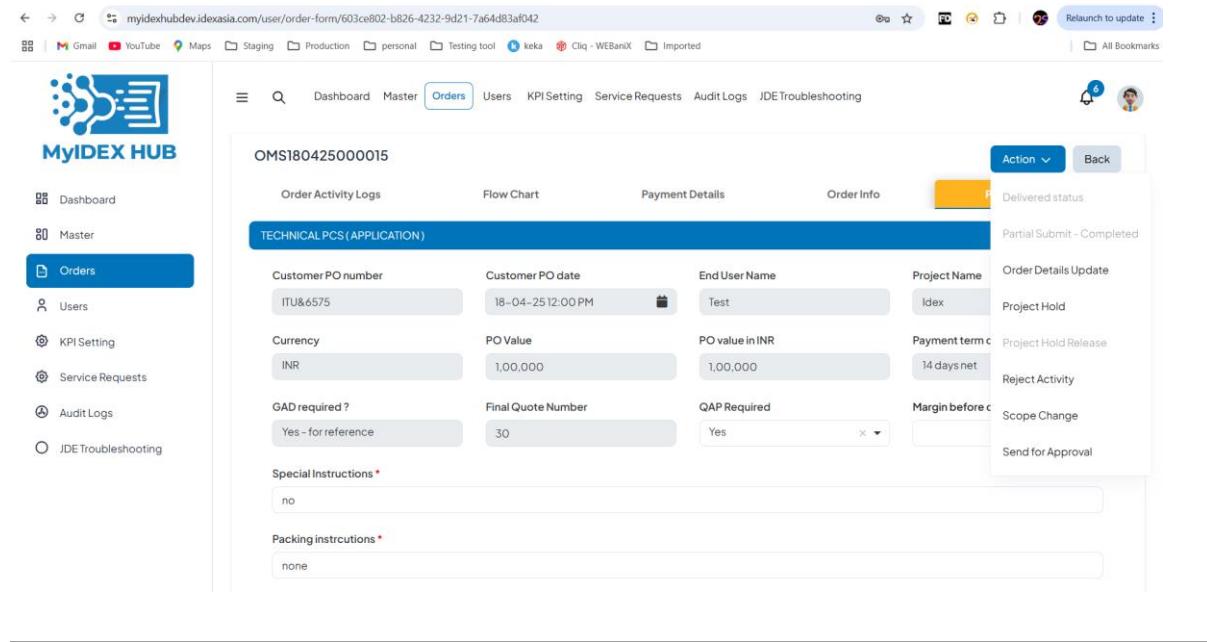


The screenshot shows the 'Code1approval (by sales)' tab of an order form. The left sidebar has 'Orders' selected. The main area contains several input fields and file upload boxes. At the bottom are five buttons: 'Save Data', 'Skip Activity', 'Partial Submit', 'Submit Without External Notification', and 'Final Submit'.

4. Each activity stage generally includes five types of buttons:

- **Save Data** – Used to **save** the currently filled data of the activity without submitting it.
- **Skip Activity** – Used to **skip** the current activity and move to the next one.
- **Partial Submit** – Used to **partially submit** the activity when it's not fully completed.
- **Submit Without External Notification** – Used to **submit the activity** without sending notifications to external users; only internal team members receive the notification.
- **Final Submit** – Used for the **final submission** of the activity once all required information is completed.

5. Action Buttons:



The screenshot shows the MyIDEX HUB Order Form interface. On the left is a sidebar with navigation links: Dashboard, Master, Orders (which is selected), Users, KPI Setting, Service Requests, Audit Logs, and JDE Troubleshooting. The main area displays an order with ID OMS180425000015. At the top right of the main area is a blue "Action" button with a dropdown arrow. A tooltip indicates that this button provides "Delivered status". Below the "Action" button are eight options: "Partial Submit - Completed", "Order Details Update", "Project Hold", "Project Hold Release", "Reject Activity", "Scope Change", and "Send for Approval".

In the **top right corner**, there is an **Action** button with the following 8 types of actions:

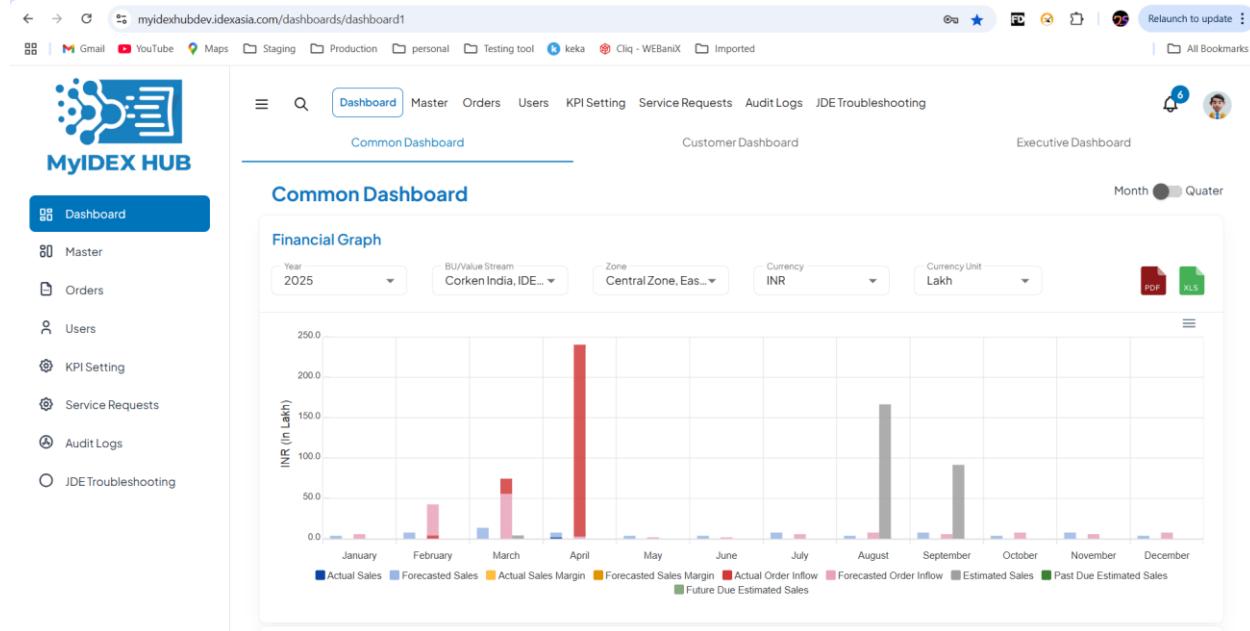
- **Send for Approval**
Used when the *margin before order execution* is **less** than the required margin set by the BLD person.
→ This action sends an **approval email** to the BLD person of the selected BU.
→ The BLD person reviews and approves the margin.
- **Scope Change**
Used to **revert the workflow** back to a first activity.
→ The system resets all following activities, setting the first one to **In-Progress**, but keeps all data saved.
→ An **email notification** is sent to all internal stakeholders of the order.
- **Order Detail Update**
Used to **update details** of an already submitted activity.
→ Sends an **email to all internal users** involved in the order notifying them of the update.
- **Project Hold**
Used to **pause or hold** the order for any reason.
→ Triggers an **email notification** to all internal users involved in the order.
- **Project Hold Release**
Used to **resume** a project that was previously on hold.
→ The order continues from where it was paused.
→ Sends an **email notification** to all internal stakeholders.
- **Reject Activity**
Used when a mistake is found in a **previously submitted activity**.
→ The activity is **rejected** with a reason.
→ The responsible user receives an **email** about the rejection.

- **Partial Submit - Completed**
Used when a **partially submitted activity** is now fully completed.
→ Marks the activity as **fully submitted**.
- **Delivered Status**
Used **after dispatch** to confirm delivery.
→ Displays **all dispatched line items**, including fields for **date** and **attachments**.

Common Dashboard

Login to MyIDEX HUB and from the left side menu, click on 'Dashboard'. Then select 'Common Dashboard' under the 'Dashboard' .

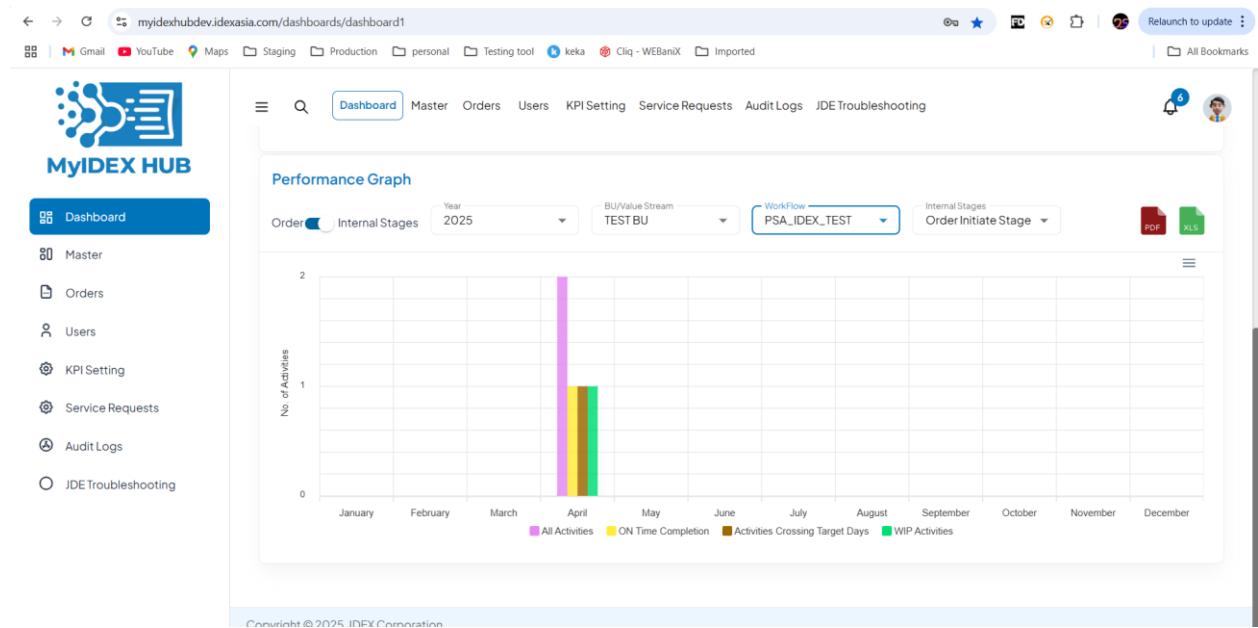
1. Financial Graph



The Financial Graph section provides a visual representation of various sales and order-related metrics. Key features include:

- Filter options for Year, BU/Value Stream, Zone, Currency, and Currency Unit.
- Displays monthly data across the selected year.
- Graph includes different colored bars representing metrics such as:
 - - Actual Sales
 - - Forecasted Sales
 - - Actual Sales Margin
 - - Forecasted Sales Margin
 - - Actual Order Inflow
 - - Forecasted Order Inflow
 - - Estimated Sales
 - - Past Due Estimated Sales
 - - Future Due Estimated Sales
- Export options available for PDF and Excel formats.

2. Performance Graph



The Performance Graph section shows the activity performance based on workflow progress. Key highlights include:

- Filter options for Year, BU/Value Stream, Workflow, and Internal Stages.
- Toggle switch between Order and Internal Stages.
- Monthly data view of activities.
- Graph displays metrics such as:
 - All Activities
 - On-Time Completion
 - Activities Crossing Target Days
 - WIP (Work in Progress) Activities
- Export options available for PDF and Excel formats.

Customer Dashboard

This Standard Operating Procedure (SOP) provides steps for managing Customer Dashboard data in the MyIDEX HUB platform.

Login to MyIDEX HUB and from the left side menu, click on 'Dashboard'. Under the 'Dashboard' section click on the Customer Dashboard.

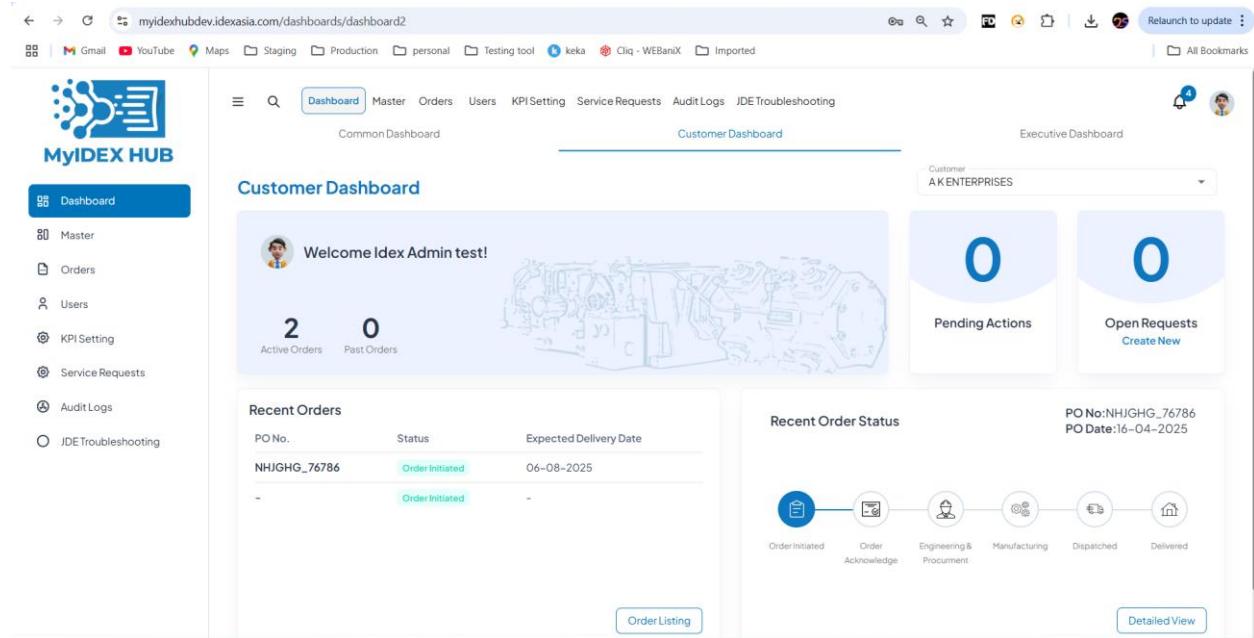


Figure: Customer Dashboard Interface

- **Select Customer:** Use the dropdown list to select a specific customer.
- **Active Orders:** Displays the number of ongoing orders for the selected customer.
- **Past Orders:** Displays the number of completed orders for the selected customer.
- **Pending Actions:** Indicates the number of payment reminders sent to the customer.
- **Open Requests:** Shows the count of service requests raised against the selected customer. If there are no open requests, a new service request can be created by clicking 'Create New'.
- **Recent Orders:** Displays a table of the customer's recent orders with details such as PO number, order status, and expected delivery date.
- **Order Listing:** Opens a complete list of all orders for the selected customer.

The screenshot shows the 'Customer Dashboard' section of the MyIDEX HUB interface. On the left, there's a sidebar with navigation links for Dashboard, Master, Orders, Users, KPI Setting, Service Requests, Audit Logs, and JDE Troubleshooting. The main area has tabs for 'Common Dashboard', 'Customer Dashboard' (which is active), and 'Executive Dashboard'. Below these tabs is a search bar labeled 'Search Orders'. A table lists 9 rows of order data:

Sr No.	Po No	PO Date	OMS ID	Required Delivery Date	Estimated Delivery Date	Pending Action	Status	Action
1	NJUH_983938	21-04-2025	OMS210425000020	30-04-2025	05-05-2025	0	Order Initiated	
2	NIHYU_387875yy44	17-04-2025	OMS170425000018	30-04-2025	30-04-2025	0	Order Initiated	
3	NIHUI_3983983	17-04-2025	OMS170425000017	30-04-2025	30-04-2025	0	Order Initiated	
4	NIHUL_39983	16-04-2025	OMS160425000016	30-04-2025	02-05-2025	0	Order Initiated	
5	UGYTF876387	10-04-2025	OMS100425000011	30-04-2025	28-04-2025	0	Order Initiated	
6	9675767	04-04-2025	OMS030425000005	08-04-2025	02-05-2025	0	Order Initiated	
7	NIHYU_39398	02-04-2025	OMS20425000004	30-04-2025	02-05-2025	0	Order Initiated	
8	MJKL_398398	02-04-2025	OMS20425000002	30-06-2025	04-05-2025	0	Order Initiated	
9	JHU_39383	02-04-2025	OMS20425000001	31-05-2025	04-05-2025	0	Order Initiated	

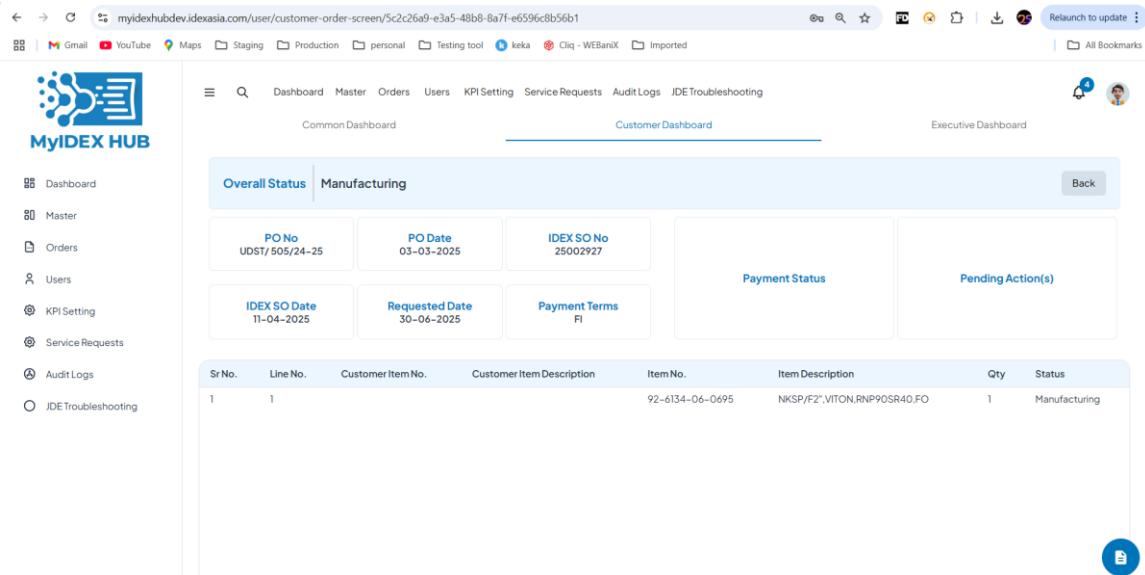
At the bottom right of the dashboard, there are buttons for 'Items per page: 10' and '1 - 9 of 9'.

- **Recent Order Status:** Shows the status of the most recent order using a visual order tracker, along with the PO number and PO date.
- **Order Tracker Stages:**
 - **Order Initiated:** Triggered when the first submission is made by the sales team, generating the OMS-ID.
 - **Order Acknowledged:** Occurs when the next status for all line items from the Sales Order (SO) is ≥ 536 for the respective OMS-ID.
 - **Engineering & Procurement:** Begins when the next status is ≥ 532 and the 'OMS Engineering Completed' button is activated.
 - **Manufacturing:** Updates when the next status for all line items from the SO is ≥ 540 .
 - **Dispatched:** Updates when the next status for all line items from the SO is ≥ 600 .
 - **Delivered:** Final stage manually updated by the dispatch team.
- **Detailed View:** Provides a comprehensive overview of the order's current status.

Order Details Page (Detailed View)

- **Order Information (Top Section):**
 - Displays key order details sourced from the JDE environment:
 - **PO No** – Purchase Order Number
 - **PO Date** – Date of the Purchase Order
 - **IDEX SO No** – IDEX Sales Order Number
 - **IDEX SO Date** – Date the Sales Order was created
 - **Requested Date** – The delivery date requested by the customer
 - **Payment Terms** – Terms of payment (e.g., FI)
- **Payment Status:**
 - Shows the current milestone payment status (Paid / Unpaid).
- **Pending Actions:**
 - Displays the number of payment reminders sent for this particular order.
- **Order Line Item Details (Bottom Section):**
 - Presents details of individual order line items, as fetched from the JDE environment:
 - Serial Number (Sr No)

- Line Number
- Customer Item Number
- Customer Item Description
- IDEX Item Number
- IDEX Item Description
- Quantity Ordered
- Current Status (e.g., Manufacturing)
- **View Document (Bottom-Right Corner):**
 - Opens a list of documents attached under the "Required Document List" for the specific order.



The screenshot shows the MyIDEX HUB Customer Order Screen. The URL in the browser is myidexhubdev.idexasia.com/user/customer-order-screen/5c2c26a9-e3a5-48b8-8a7f-e6596c8b56b1. The top navigation bar includes links for Gmail, YouTube, Maps, Staging, Production, personal, Testing tool, keka, Cliq - WEBanX, Imported, Relaunch to update, and All Bookmarks. The left sidebar menu includes Dashboard, Master, Orders, Users, KPI Setting, Service Requests, Audit Logs, and JDE Troubleshooting. The main content area is divided into three tabs: Common Dashboard, Customer Dashboard (selected), and Executive Dashboard. The Customer Dashboard section displays Overall Status (Manufacturing), PO No (UDST/ 505/24-25), PO Date (03-03-2025), IDEX SO No (25002927), IDEX SO Date (11-04-2025), Requested Date (30-06-2025), Payment Terms (FI), Payment Status, and Pending Action(s). Below this, a table lists order items:

Sr No.	Line No.	Customer Item No.	Customer Item Description	Item No.	Item Description	Qty	Status
1	1			92-6134-06-0695	NKSP/F2',VITON,RNP90SR40,FO	1	Manufacturing

Executive Dashboard

Login to MyIDEX HUB and from the left side menu, click on 'Dashboard'. Then select 'Executive Dashboard' under the 'Dashboard' section.

Executive Dashboard Overview

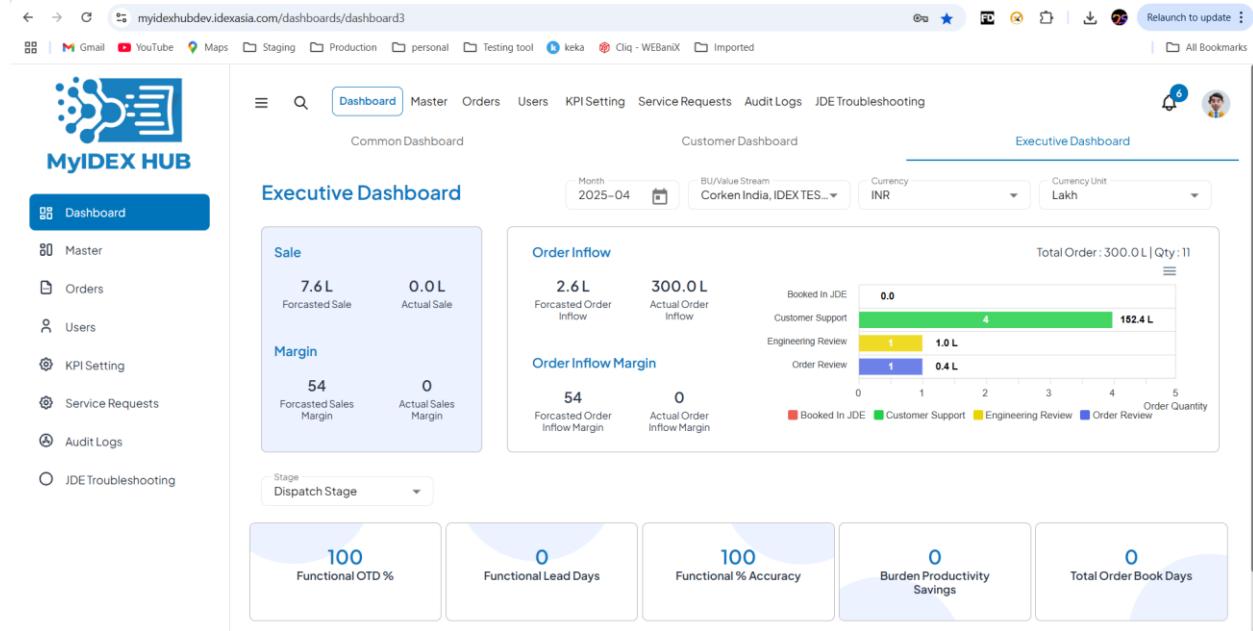


Figure 1: Executive Dashboard Interface

Key Components of the Executive Dashboard:

--- **Months Determination:** Based on the OMS ID generation month.

--- **Data Filtering:** Displayed based on the selected Business Unit (BU).

--- **Currency Conversion:** Data is converted according to the selected currency.

--- LEFT CARD

1. **Forecasted Sales :** Comes form KPI inputs of sales forecast.
2. **Forecasted Sales Margin :** Comes from KPI input of Sales forecast margin.
3. **Actual Sales :** Addition of ExtPrice of all order line no comes from JDE.

--- RIGHT CARD

- 1. Forecasted Order Inflow** : Comes from KPI inputs of order inflow forecast.
- 2. Forecasted Order Inflow Margin** : Comes from KPI inputs of order inflow margin.
- 3. Actual Order Inflow** : Addition of ExtPrice of Order line no if order is exist in JDE else Addition of Customer PO value from our IDEX portal.

--- RIGHT SIDE GRAPH

- 1. Order Booked in JDE** : Addition of ExtPrices of all orders whose Sales order No. is generated (Exist in JDE).
- 2. Engineering** : Addition of Customer PO value of orders whose current stage is Engineering (Decided by Action by ID).
- 3. Application** : Addition of Customer PO value of orders whose current stage is Application (Decided by Action by ID).
- 4. CSR** : Addition of Customer PO value of orders whose current stage is CSR (Decided by Action by ID).

--- FUNCTION TILES BASED ON SELECTED STAGE.

- 1. Functional OTD %** : The system displayed the
-- Formula : $(\text{Completed withing target days} / \text{Total number of completed stages}) * 100$
- 2. Functional Lead Days** : The system displayed the -- $(\text{Sumation of all Stage's actual days} / \text{Total no. stages}) * 100$
- 3. Functional % Accuracy** : The system displayed the Percentage of those order stage which are not rejected. Example - 5 are rejected out of 10 orders then 50%.4. Burden Productivity Savings : Client Side Pending.
- 5. Total Order Book Days** : The system should display the difference between the oms Id generation date and sales order generation date

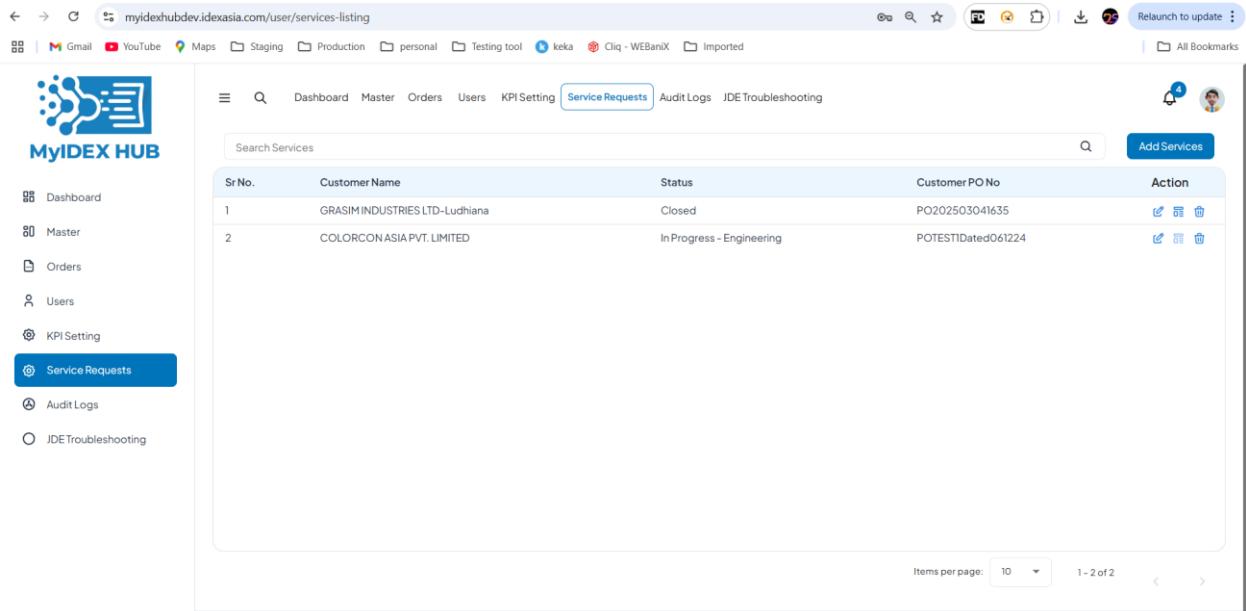
Service Request Module

This Standard Operating Procedure (SOP) provides steps for managing Service Request data in the MyIDEX HUB platform. It includes the process for adding, editing, and deleting entries in the service section.

Login to MyIDEX HUB and from the left side menu, click on 'Service Request'. Under the 'Service Request' section to view the list of existing services.

1. Service Requests Listing

- This section lists all service requests along with their statuses and associated customer PO numbers.
- On Click On the Add service button the service request forms opens.
- On click pencil icon or trash icon for edit or delete existing entry of service request.
- On click on the middle icon between edit or delete we can generate CAPA report.



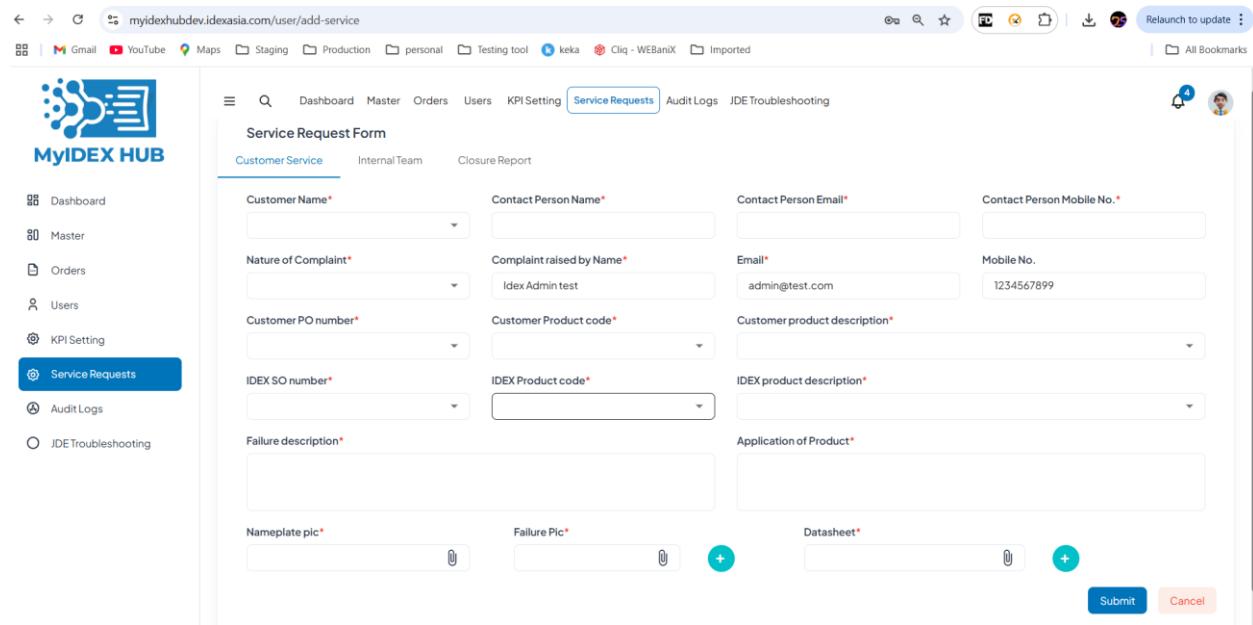
Sr No.	Customer Name	Status	Customer PO No	Action
1	GRASIM INDUSTRIES LTD-Ludhiana	Closed	PO202503041635	
2	COLORCON ASIA PVT. LIMITED	In Progress - Engineering	POTESTIDated061224	

2. Customer Service Request Form

This is the first form under the Service Request module, categorized as "Customer Service". The form is used to log service requests from customers. Below are the key fields and their functions:

← → ⌂ myidexhubdev.idexasia.com/user/add-service

Gmail YouTube Maps Staging Production personal Testing tool keka Cliq - WEBanix Imported Relaunch to update All Bookmarks



- **Customer Name:** Select the customer for whom the service request is being generated from the dropdown list.
- **Contact Person Details:** Fill in the contact person's name, email address, and mobile number for the respective customer.
- **Nature of Complaint:** Select the complaint nature from a dropdown list sourced from the 'Nature of Complaint' master.
- **Logged-in User Details:** Fields including 'Complaint raised by Name', 'Email', and 'Mobile No.' are auto-filled with the information of the currently logged-in user.
- **Customer PO Number:** Displays all purchase order numbers associated with the selected customer. Choose the appropriate one.
- **Auto-Fetched SO Details:** Based on the selected PO number, the following details are automatically retrieved:
 - Customer Product Code
 - Customer Product Description
 - IDEX SO Number
 - IDEX Product Code
 - IDEX Product Description
- **Failure Description and Application of Product:** Manually input the failure description and the application in which the product is used.
- **File Upload Fields:** Upload relevant documents using the following fields:
 - Nameplate Picture
 - Failure Picture
 - Datasheet

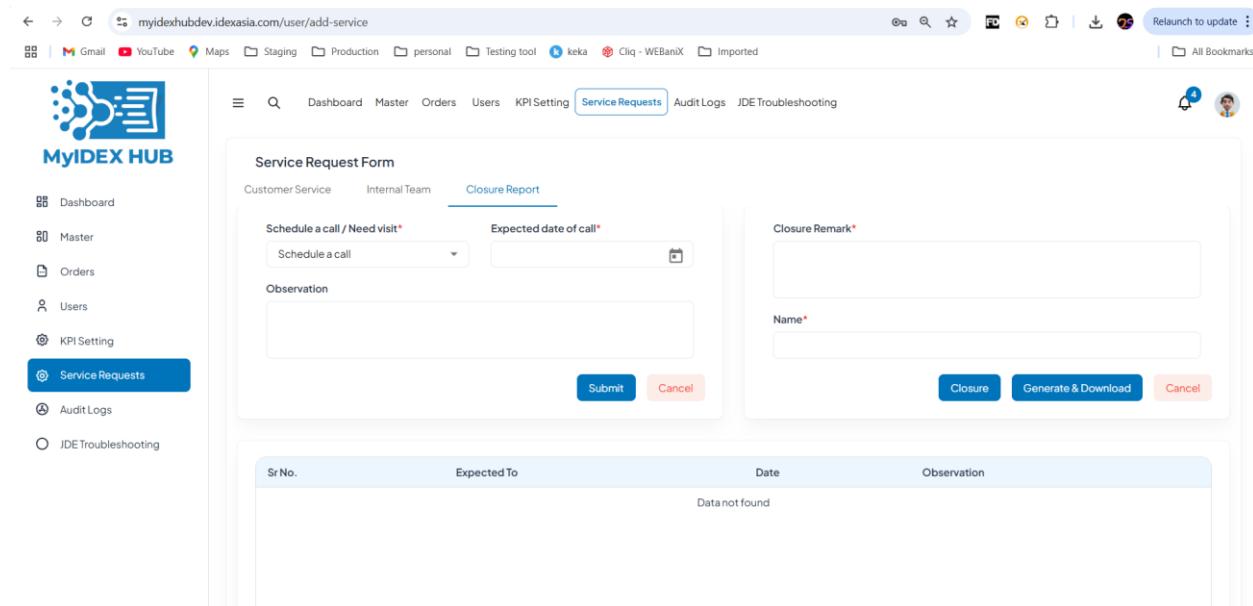
3. Internal Team Form

The screenshot shows the 'Internal Team' tab selected in the top navigation bar of the 'Service Requests' section. The main area contains a 'Service Request Form' with various input fields and dropdown menus. The fields include 'Serial Number*', 'Tag number*', 'Expectation*', 'Product under Warranty*', 'Type of supply*', 'Severity*', 'Expected closure date*', and 'Forward request to'. There are also 'Submit' and 'Cancel' buttons.

Internal Team Service Request Form Description:

- This form is filled by the service receiver person of the respective Business Unit (BU) associated with the order.
- Below are the fields in the form:
- **Serial Number:** Enter the serial number of the product.
- **Tag Number:** Enter the tag number related to the product.
- **Expectation:** Define the expectation for the service request resolution.
- **Product under Warranty:** Select from dropdown whether the product is under warranty.
- **Type of Supply:** Select the type of supply related to the product from the dropdown list.
- **Severity:** Choose the severity level of the issue from the dropdown.
- **Expected Closure Date:** Select the expected date of service request closure using the calendar input.
- **Forward Request To:** Select a person (based on role) from the dropdown list who will receive an email notification when the form is submitted.

4. Closure Report Form



The screenshot shows the 'Service Request Form' under the 'Closure Report' tab. The left sidebar includes links for Dashboard, Master, Orders, Users, KPI Setting, Service Requests (which is highlighted in blue), Audit Logs, and JDE Troubleshooting. The main form has fields for 'Schedule a call / Need visit*' (dropdown menu), 'Expected date of call*' (calendar icon), 'Observation' (text area), 'Closure Remark*' (text area), and 'Name*' (text area). At the bottom are buttons for 'Submit' (blue), 'Cancel' (red), 'Closure' (blue), 'Generate & Download' (blue), and another 'Cancel' button.

- Below are the fields to be filled in the Closure Report section of the Service Request Form:
- Schedule a call / Need visit:** Select an appropriate option (e.g., schedule a call, need visit) from the dropdown based on the type of follow-up action required.
- Expected date of call:** Select the date from the calendar when the call or visit is expected to take place.
- Observation:** Enter any relevant observations made during the service or site visit.
- Closure Remark:** Provide final remarks or summary regarding the resolution of the service request.
- Name:** Enter the name of the person completing this closure report.

After all fields are completed, the following options are available:

- **Submit:** To save and submit the closure details.
- **Closure:** To mark the request as closed.
- **Generate & Download:** To generate and download a report of this closure request.
- **Cancel:** To discard changes or exit the form.

Note : Whenever the service request is closed, the closure report will be attached to the email, and the email will be sent to all service-related persons.