MyIDEX HUB

My IDEXHUB Customer

Standard Operation Procedure

IDEX | Trusted Solutions, Improving Lives™

Version: 1.0

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MyIDEX HUB

Contents

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.

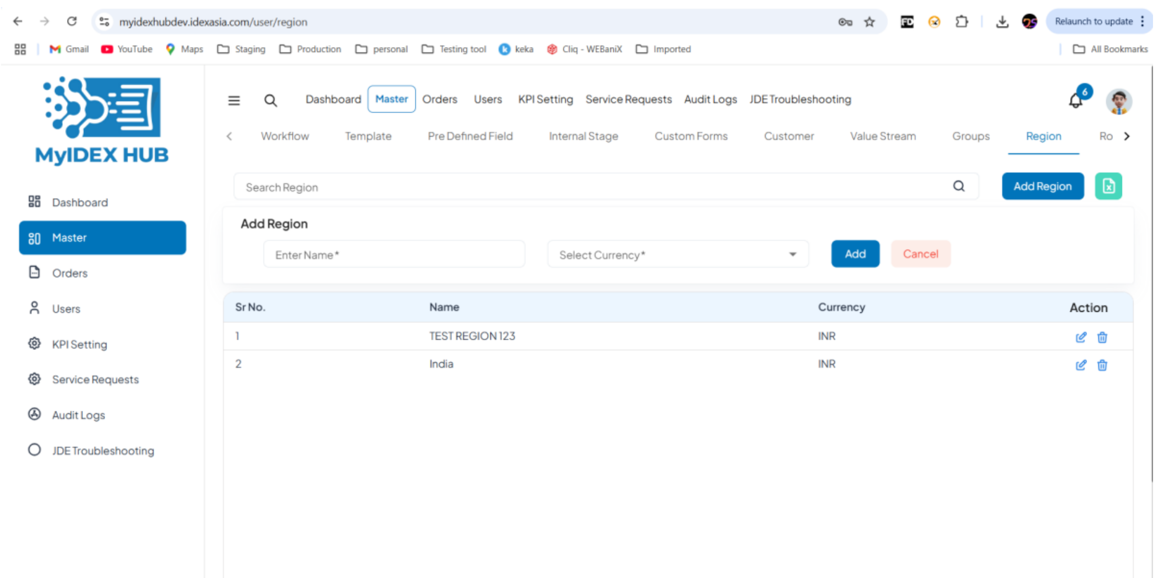
2. Select the 'Region' sub-tab from the top menu.

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:



Notes

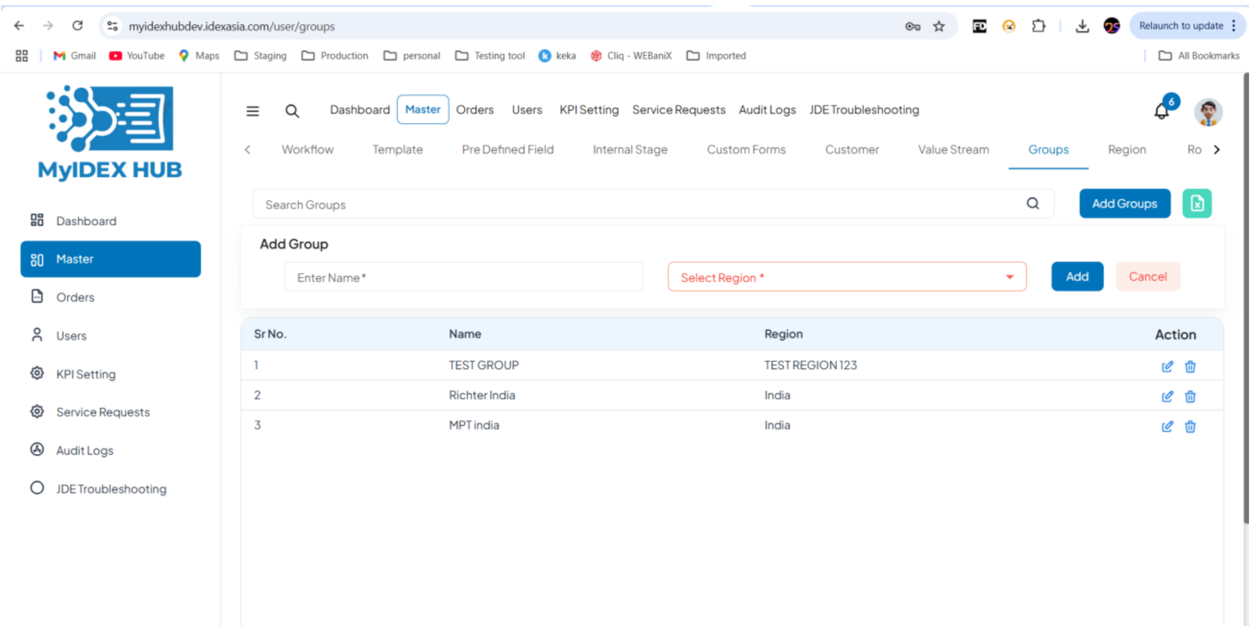
• To edit a region, click the pencil (edit) icon under the 'Action' column.
• To delete a region, click the trash bin icon under the 'Action' column.

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.



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.

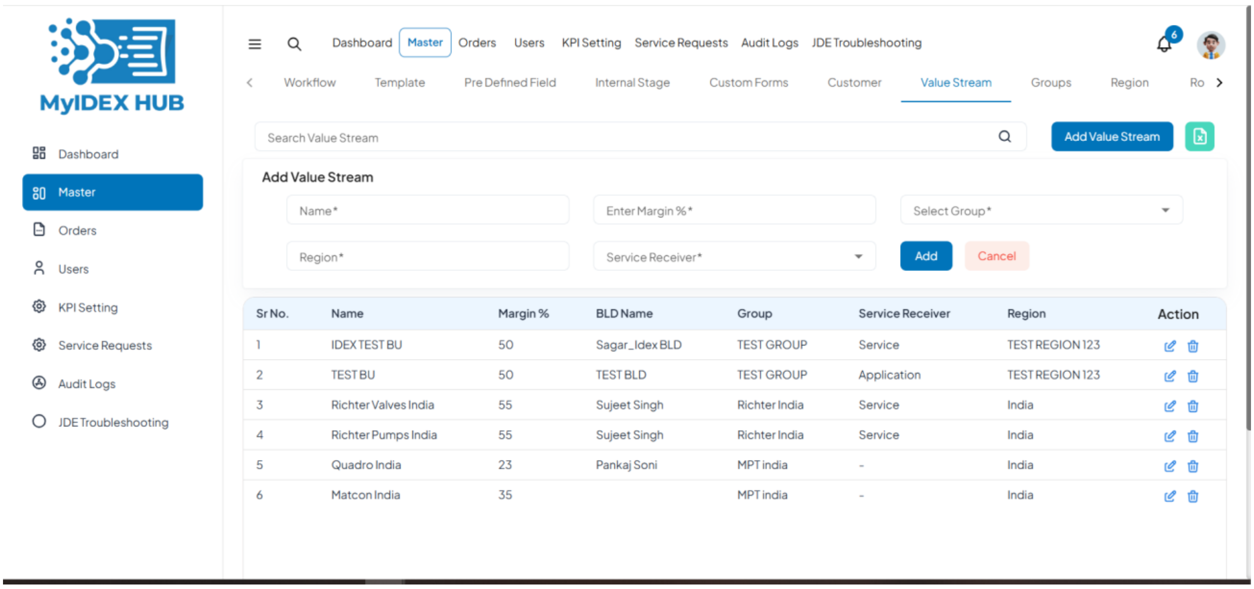
2. Navigation to Value Stream

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:



4. Editing or Deleting a Value Stream

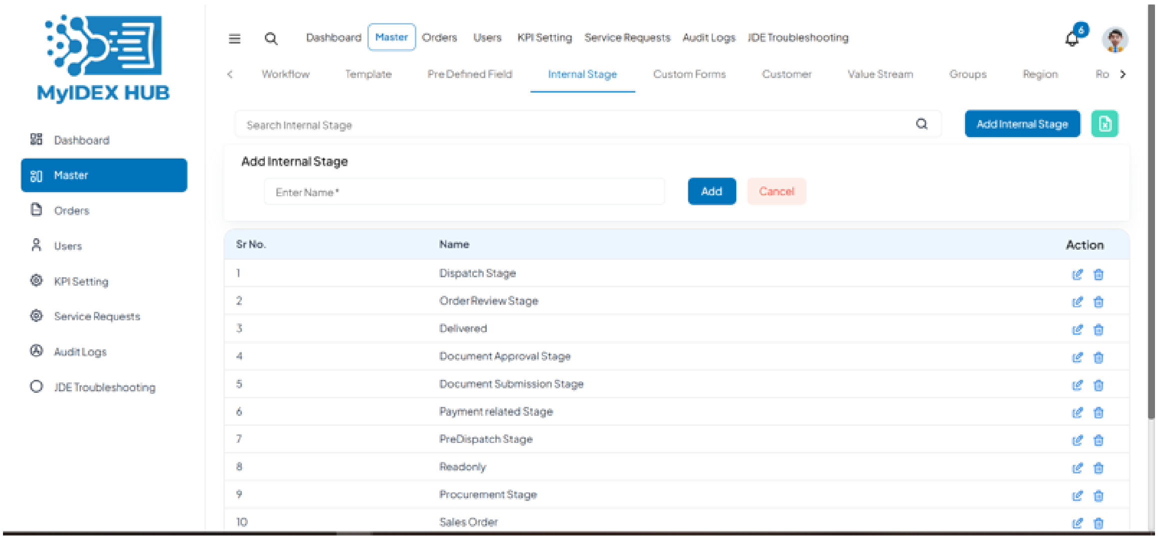
Each row in the Value Stream table has action icons:
- Click the pencil icon to edit an entry.
- Click the trash icon to delete an entry.

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.



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.

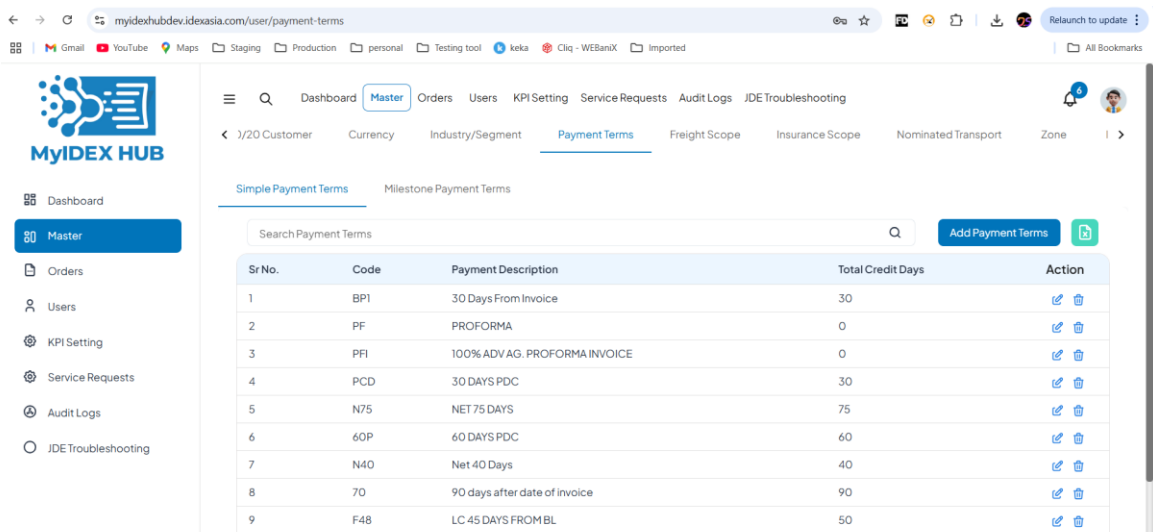
1. Navigation

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.



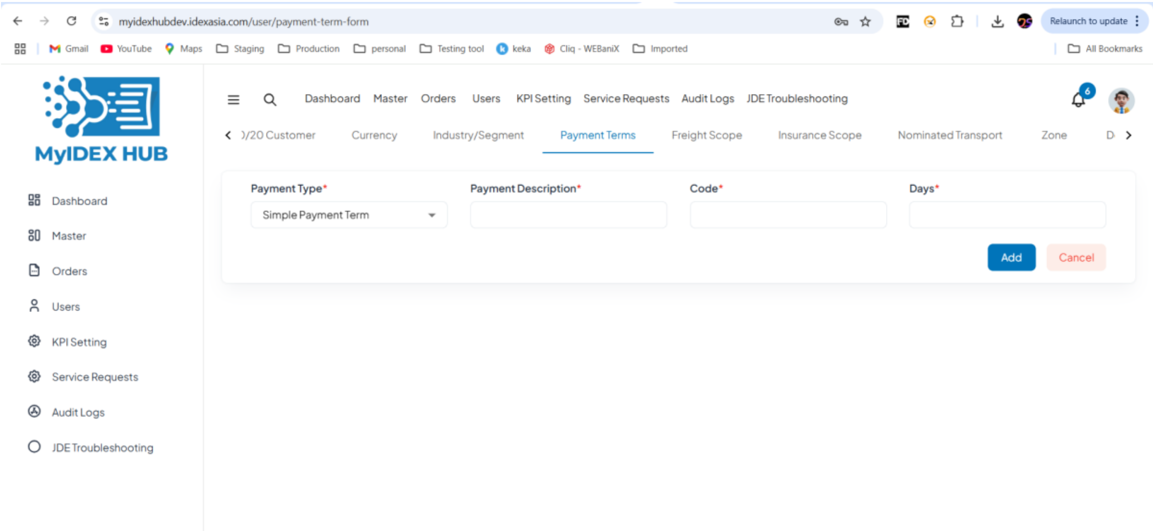
3. Adding a New Payment Term

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.



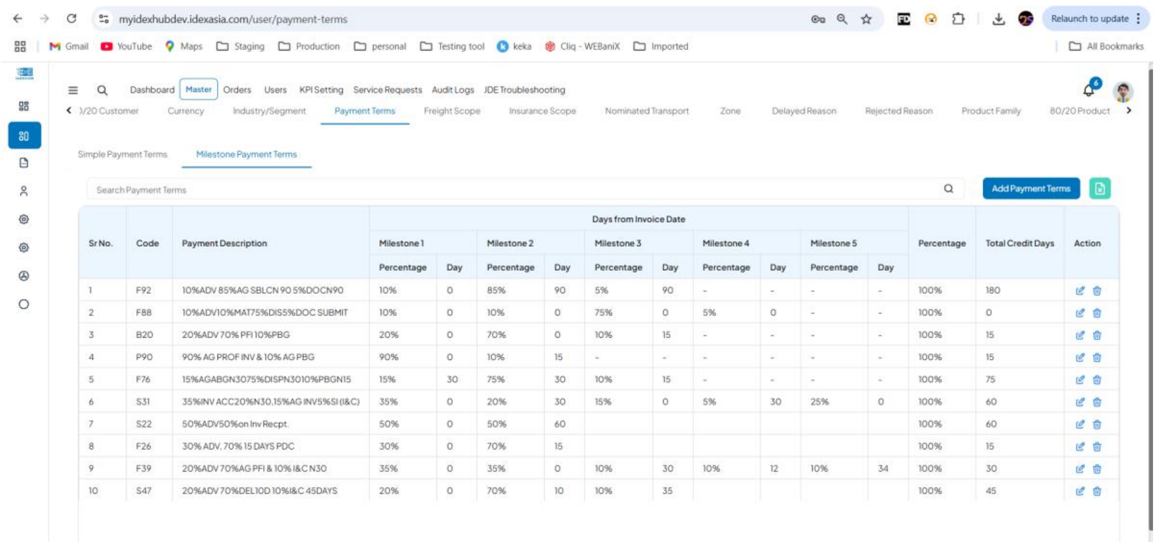
B. Milestone Payment Term

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:

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

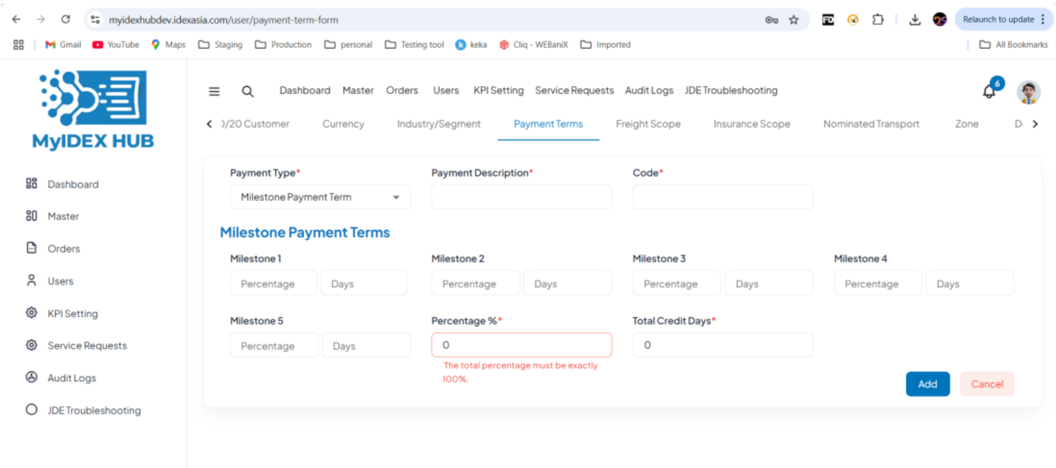


2. Adding a New Milestone Payment Term

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.

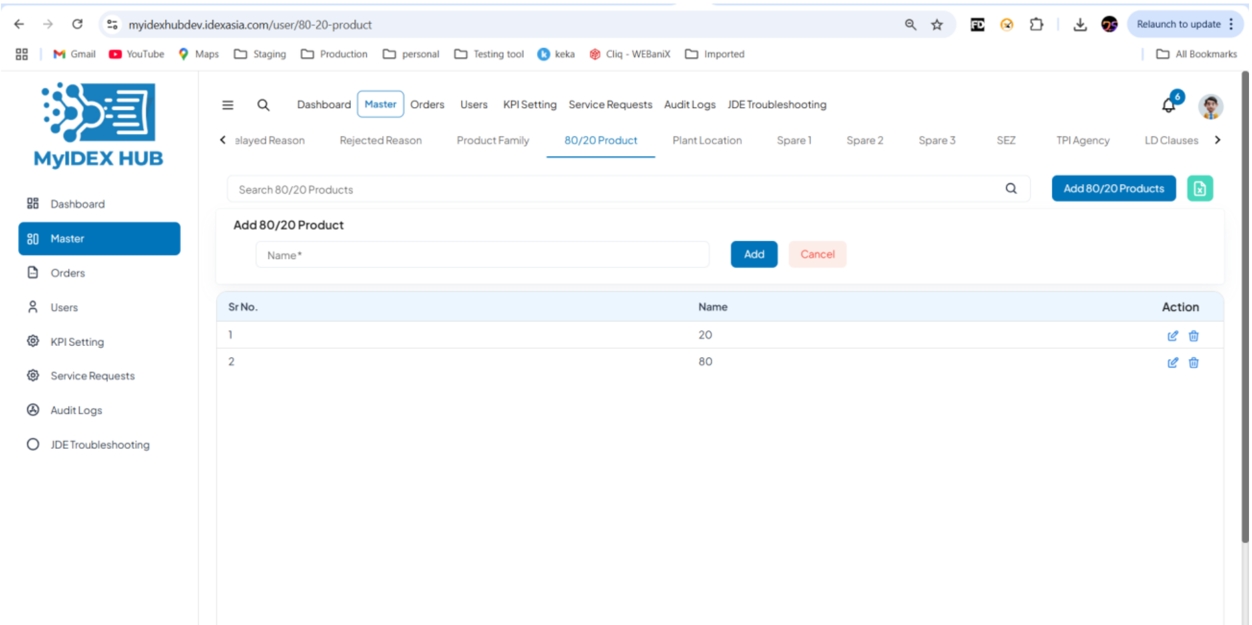


80/20 Product Master

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.



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

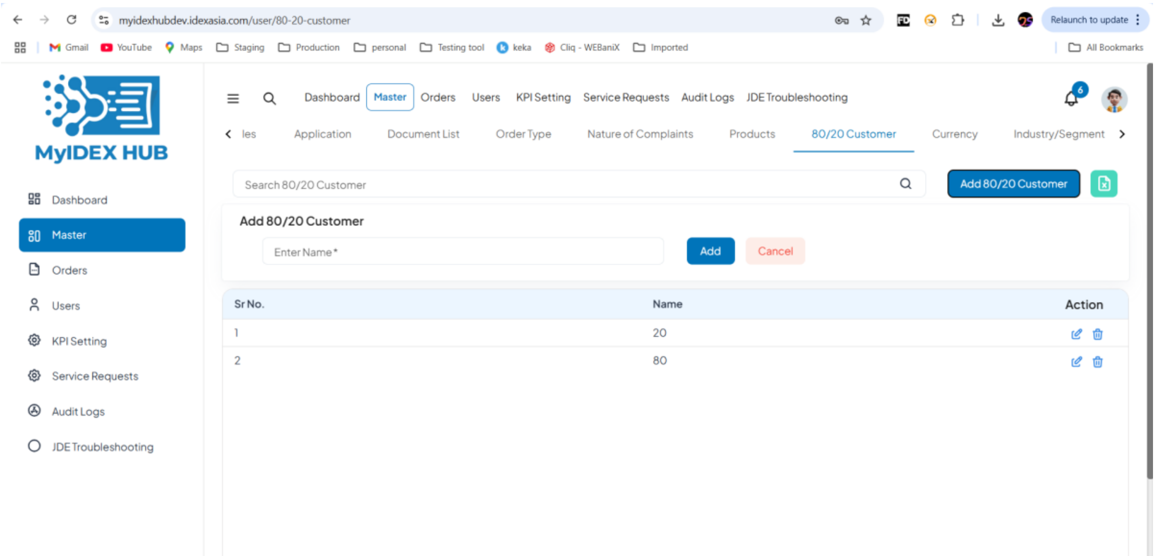
Module: 80/20 Customer Master Management

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:



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

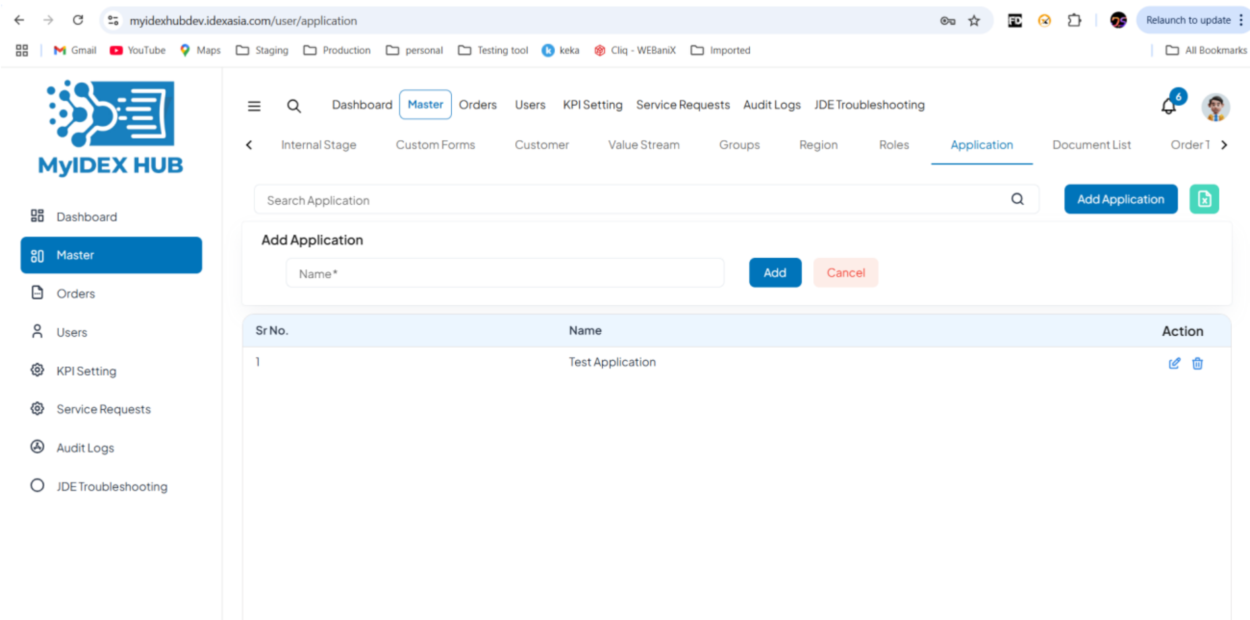
From the dashboard, go to the 'Master' section on the left-hand menu. Then select 'Application' from the top navigation bar.

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.



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.

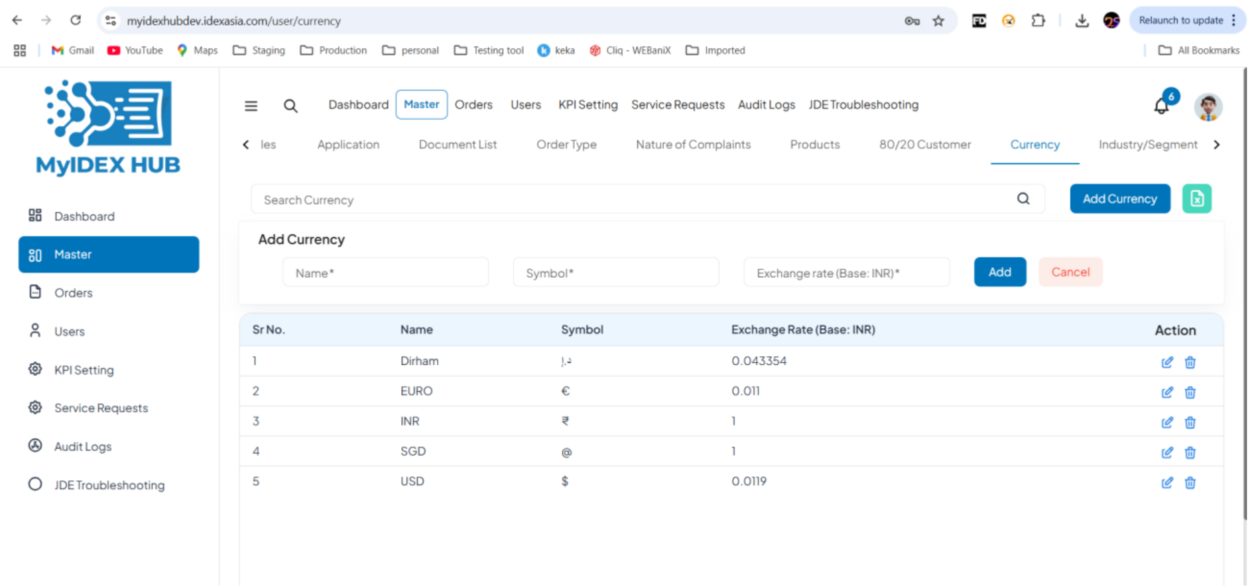
2. Click on the 'Currency' tab from the top navigation bar.

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



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.

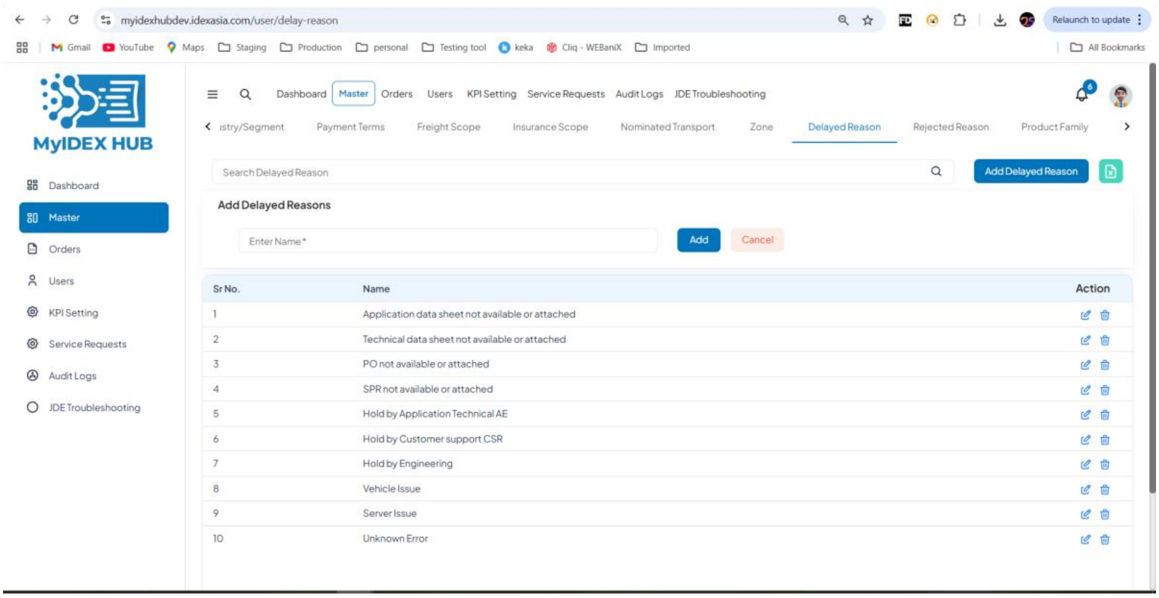
4. To add a new reason:

- - Enter the reason in the input box labeled "Enter Name*".
- - Click the "Add" button to save the new delayed reason.

14. 5. 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.



Document List Master

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

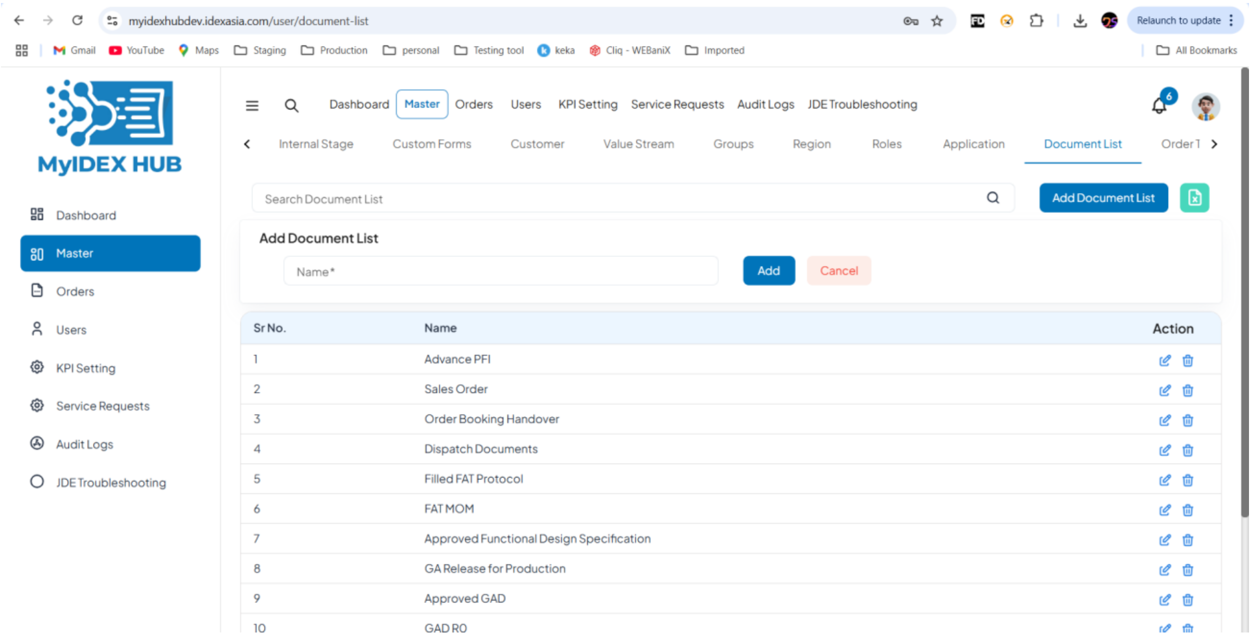
Steps to Access and Manage Document List:

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:



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.

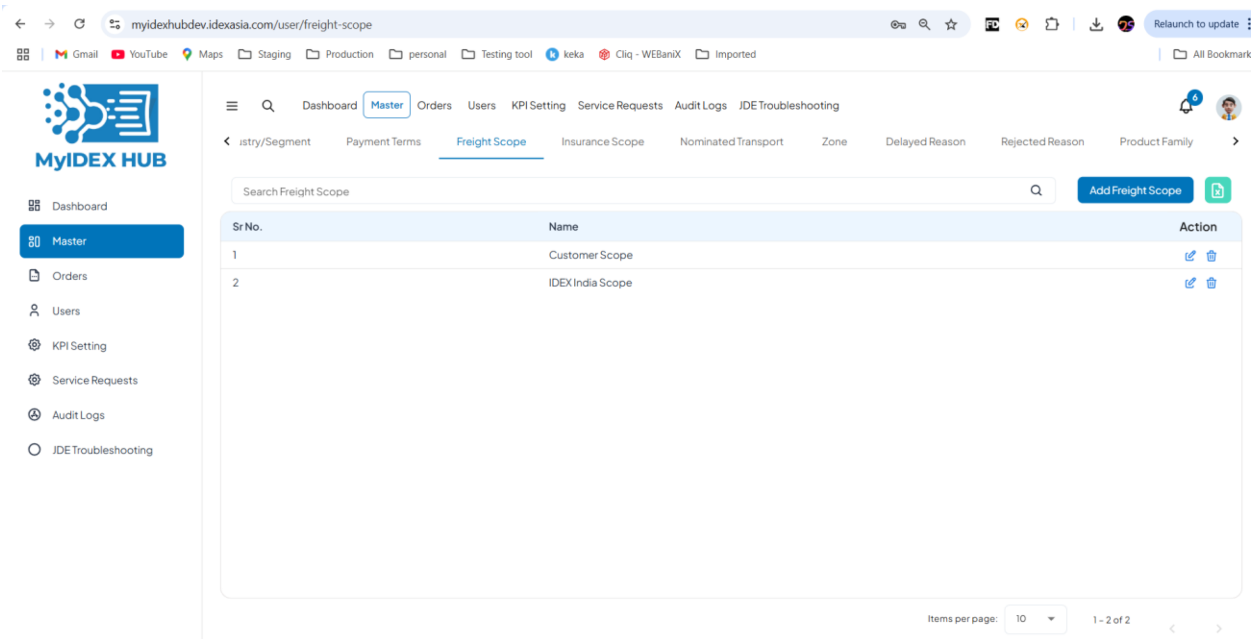
6. To edit or delete a document, use the respective edit (pencil) or delete (trash bin) icons in the "Action" column.

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.



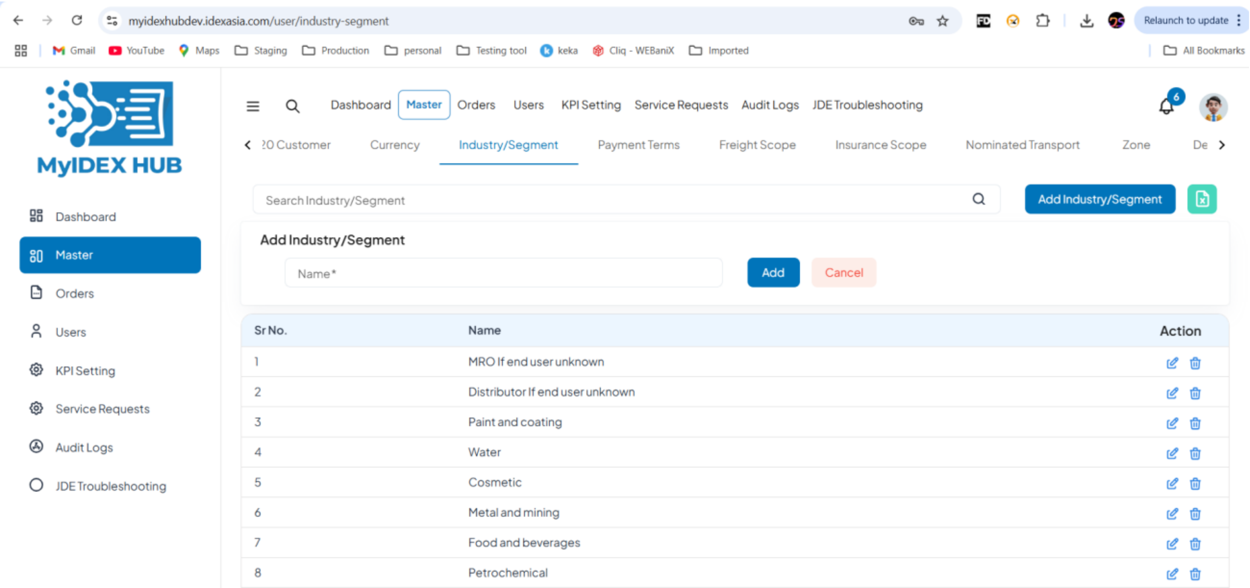
2. Managing Freight Scope

- 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



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:

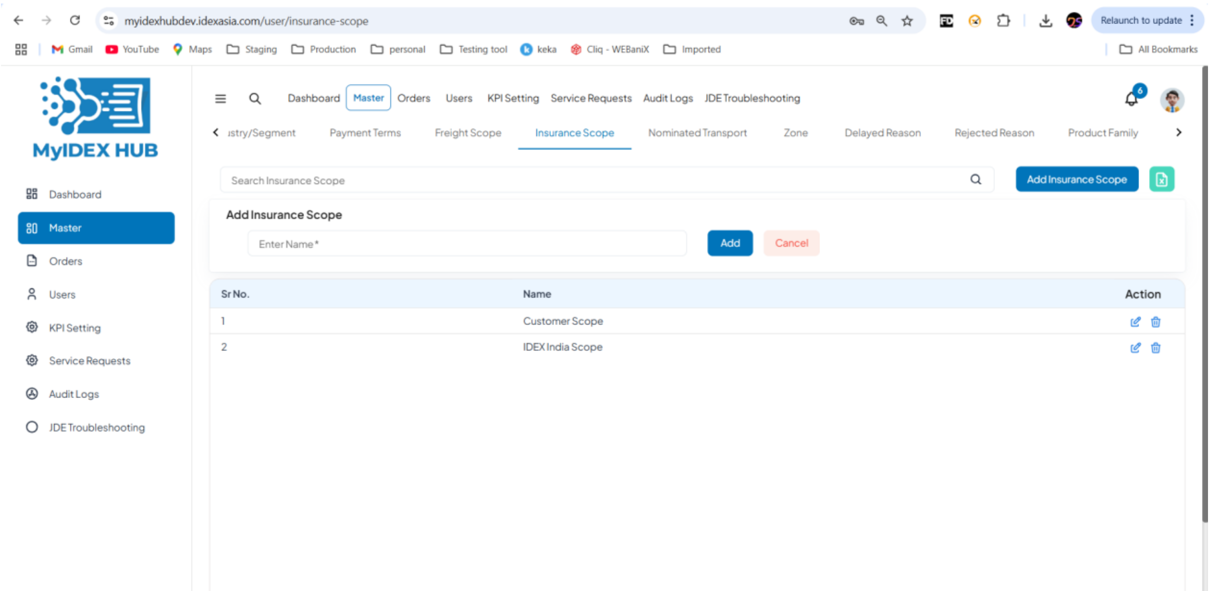


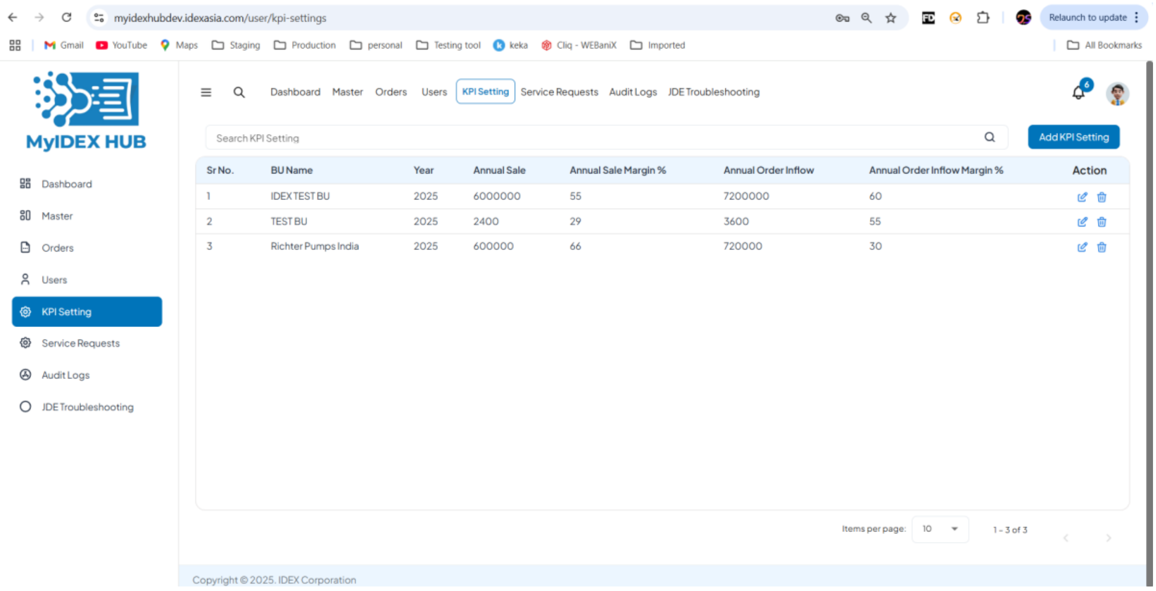
Figure 1: Insurance Scope interface on MyIDEX HUB.

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 .

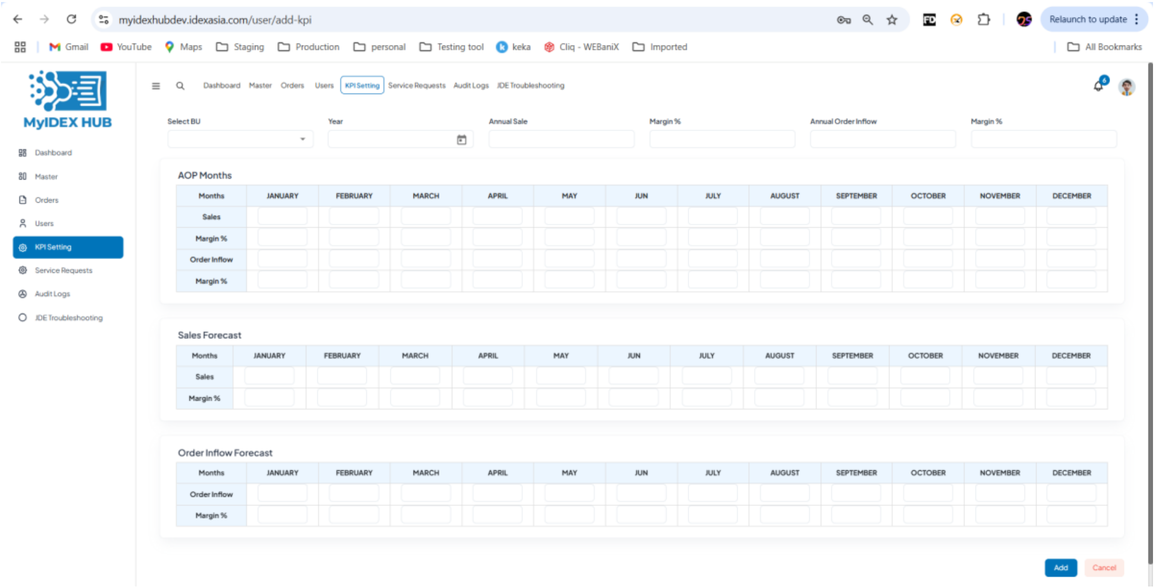
Step 1: Navigate to KPI Settings

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



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.



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.

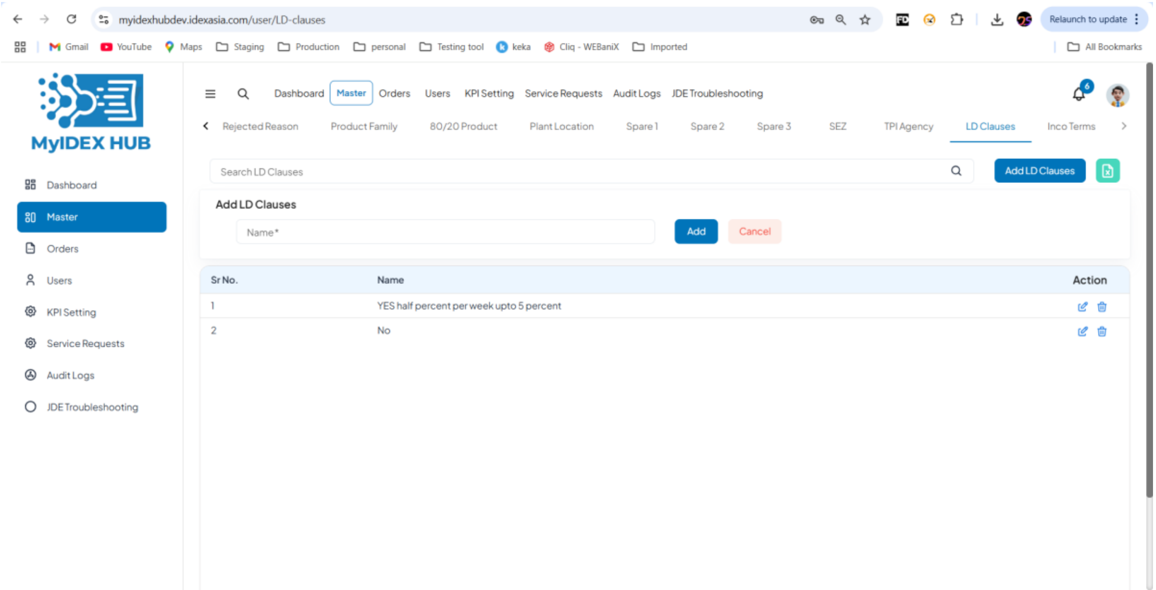
4. Procedure

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:



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:

a. Enter the name of the Inco Term in the 'Enter Name' field.

b. Select the type from the dropdown (e.g., import).

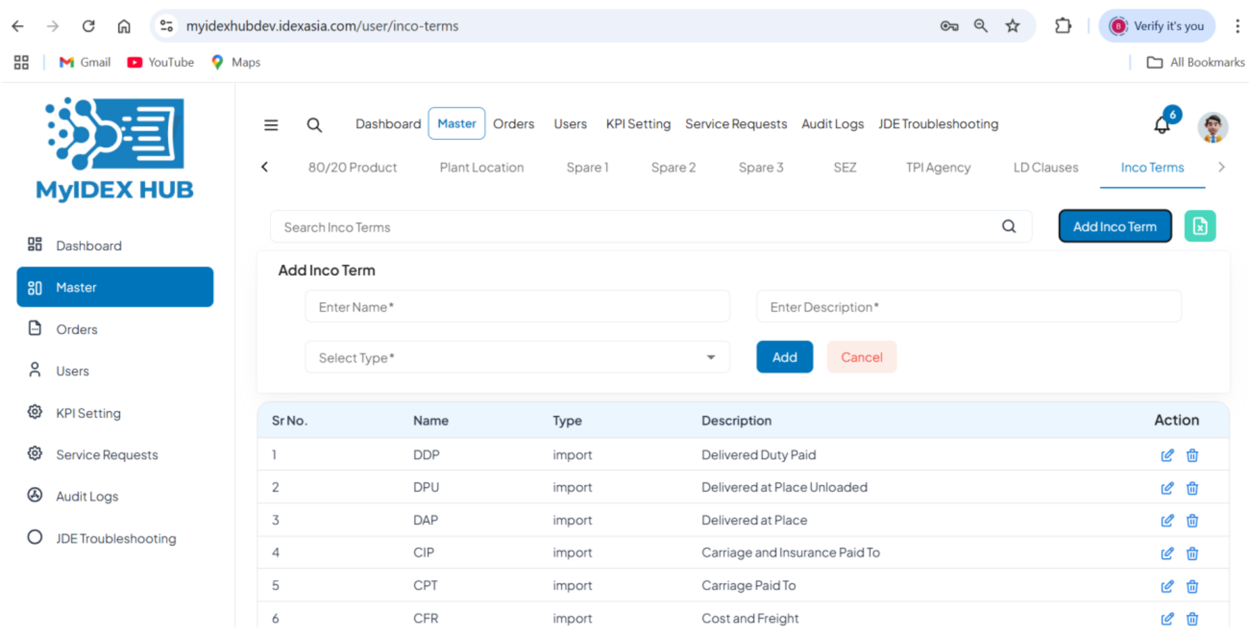
c. Enter a description in the 'Enter Description' field.

d. 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



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.

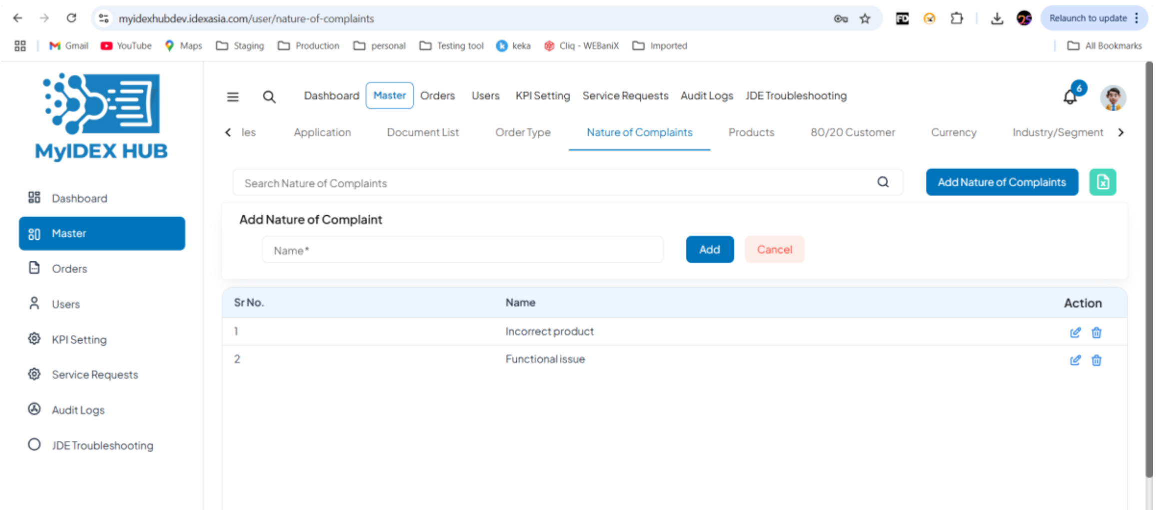
Scope

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



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.

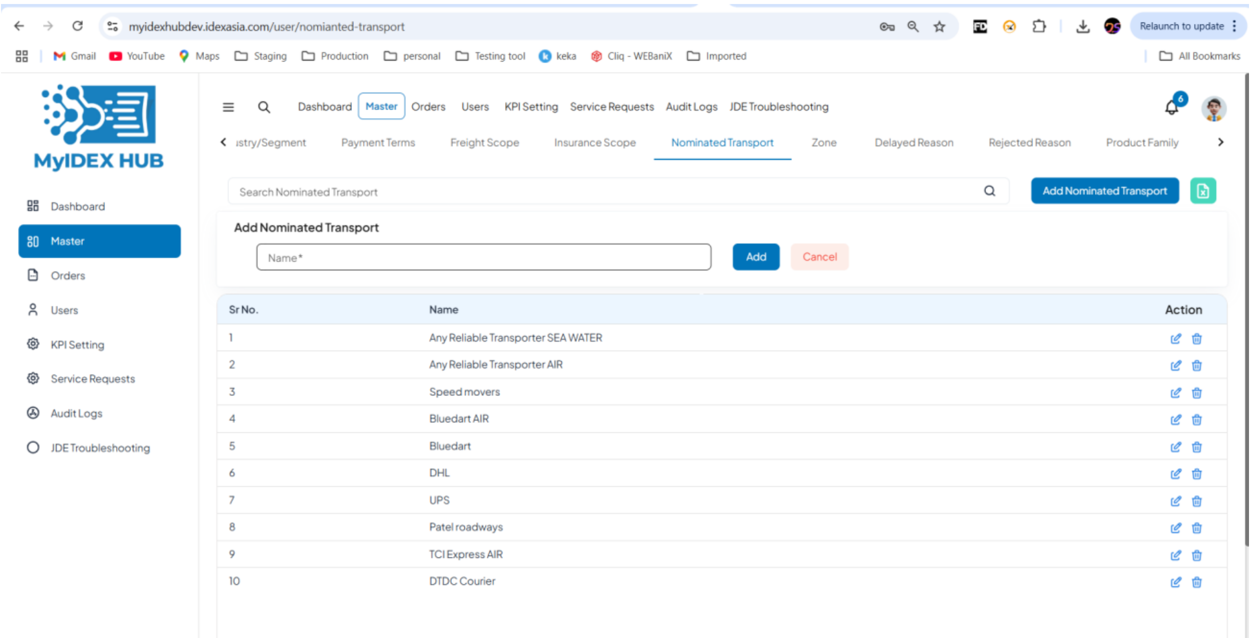


Figure 1: Nominated Transport Interface in MyIDEX HUB

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.

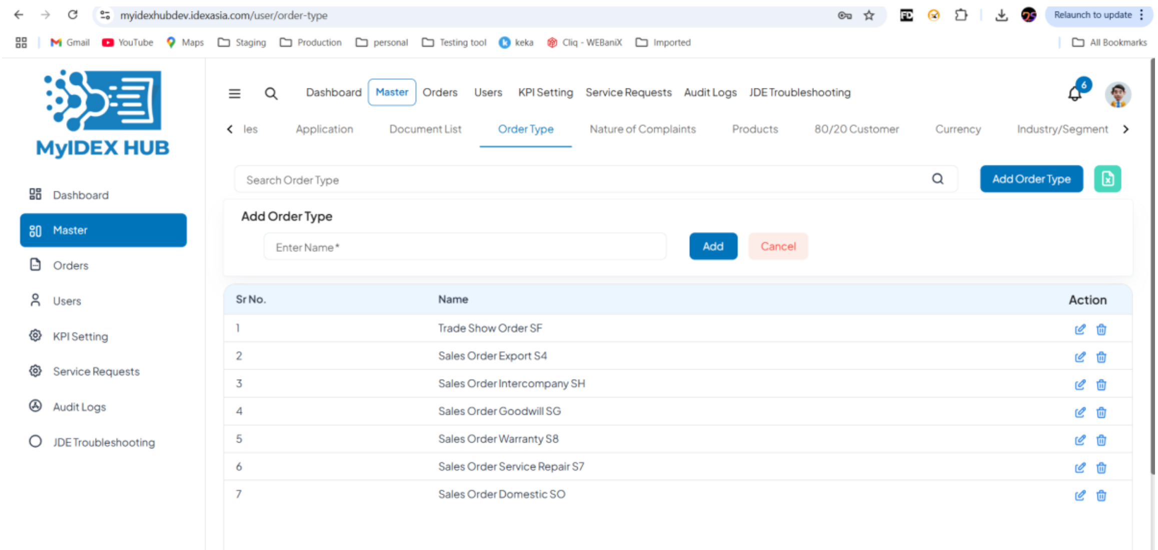
Order Type Master

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:


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.

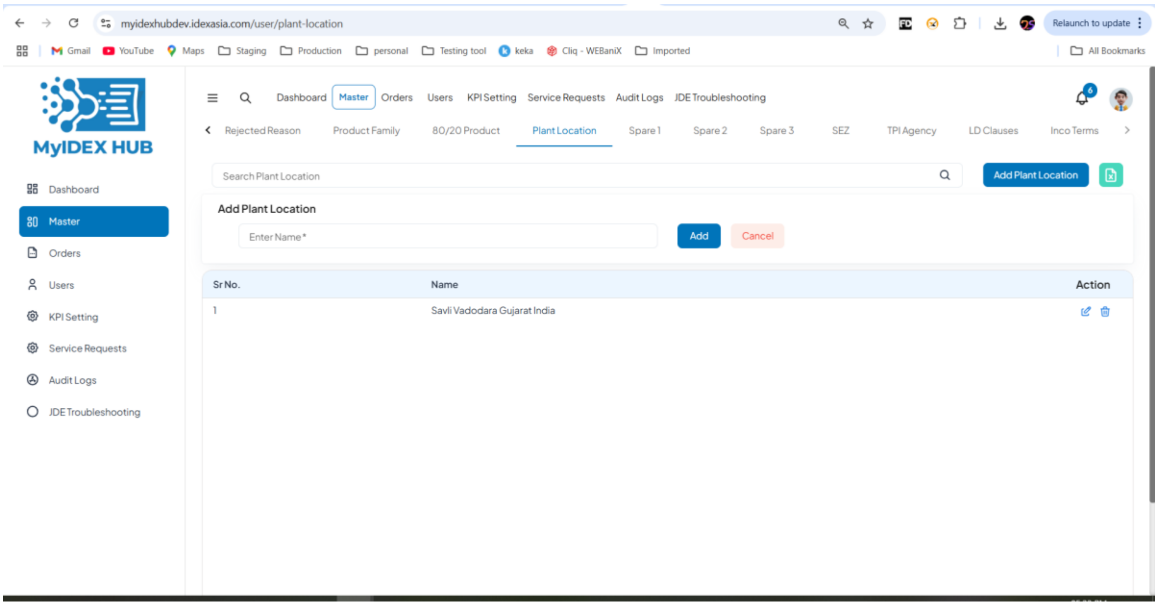
Step 2: Add a New Plant Location

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



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

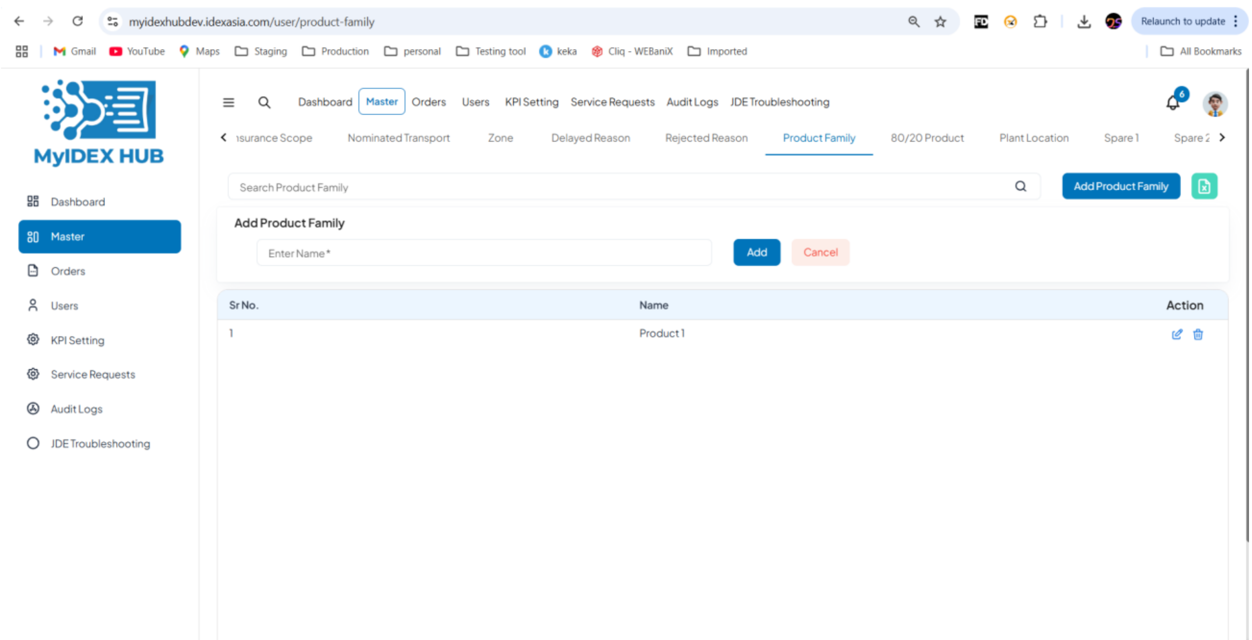
To access the Product Family module:
1. Log into the MyIDEX HUB system.
2. Navigate to the left sidebar and click on 'Master'.
3. Click on the 'Product Family' tab on the top menu.

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.



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.

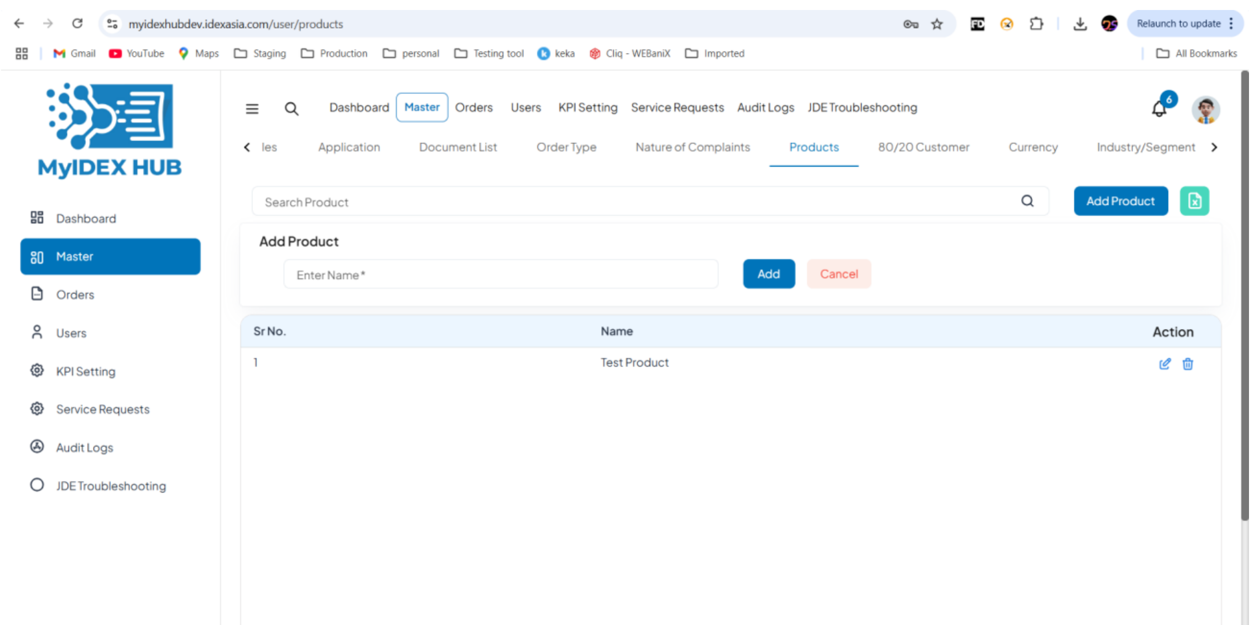
4. To add a new product:

- 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:



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.

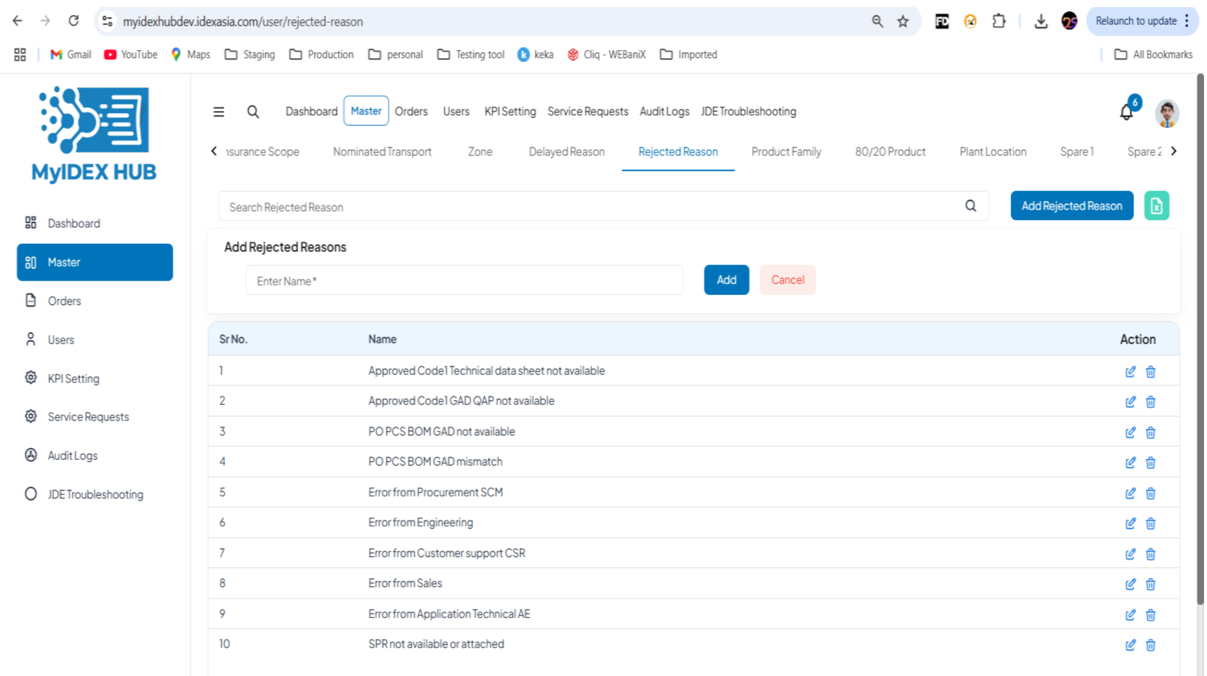
5. To cancel, click on the 'Cancel' button.

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.



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'.

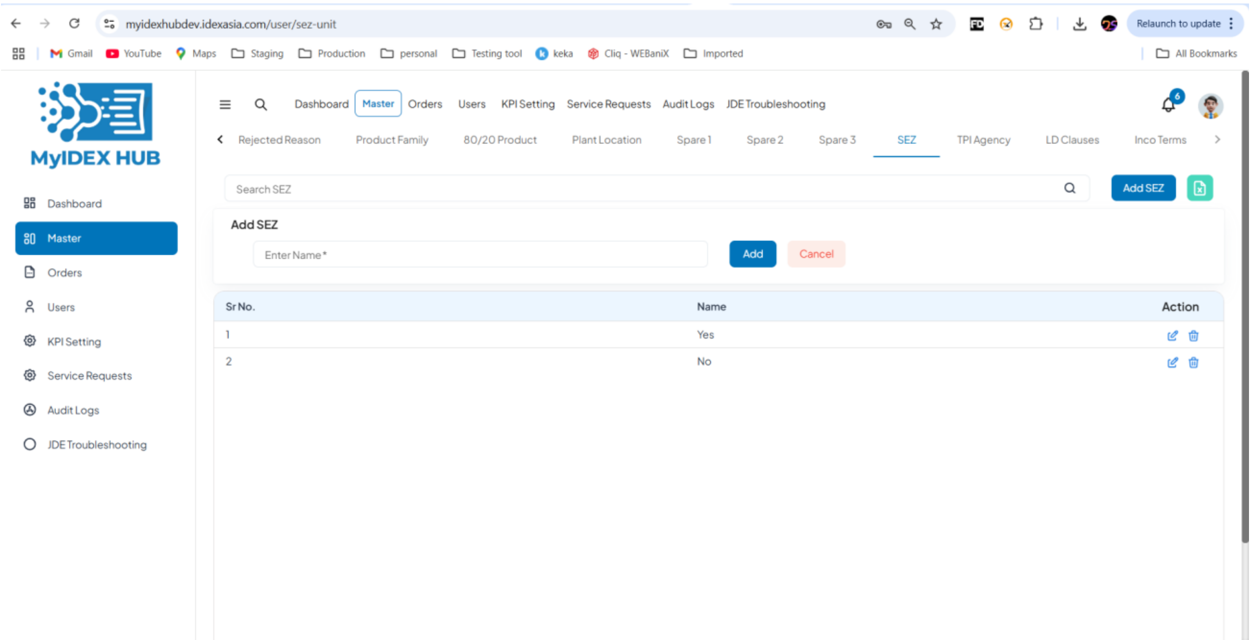
3. From the top tab options, click on 'SEZ'.

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.



Screenshot: SEZ Management Interface

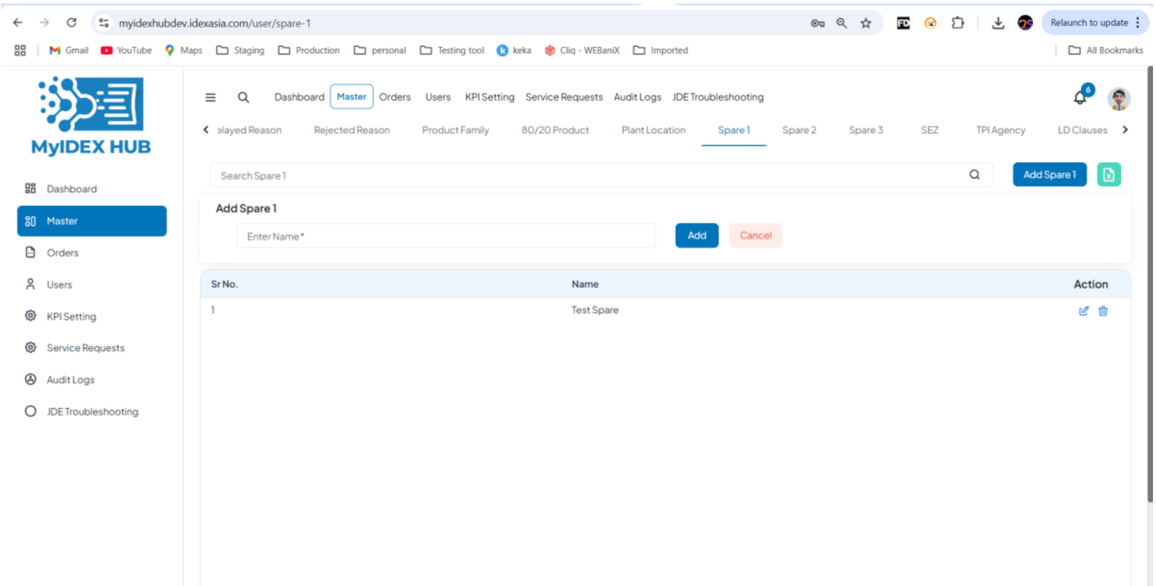
Spare 1 Master

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:



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.

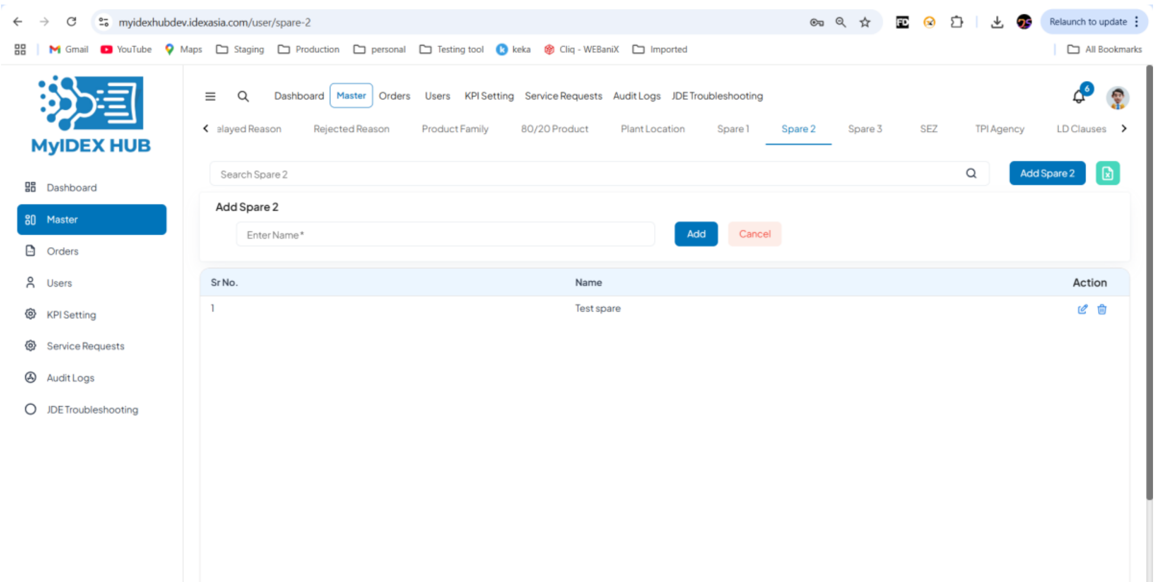
2. Click on the "Spare 2" tab.

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:



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

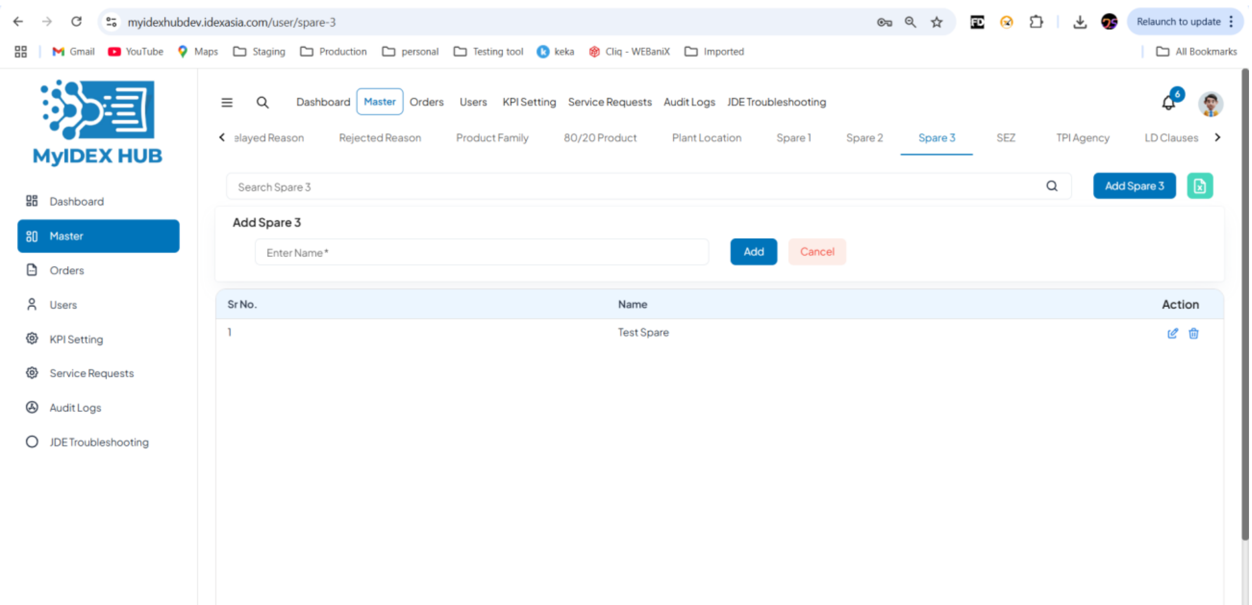
3. Steps to Add Spare 3

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:



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:

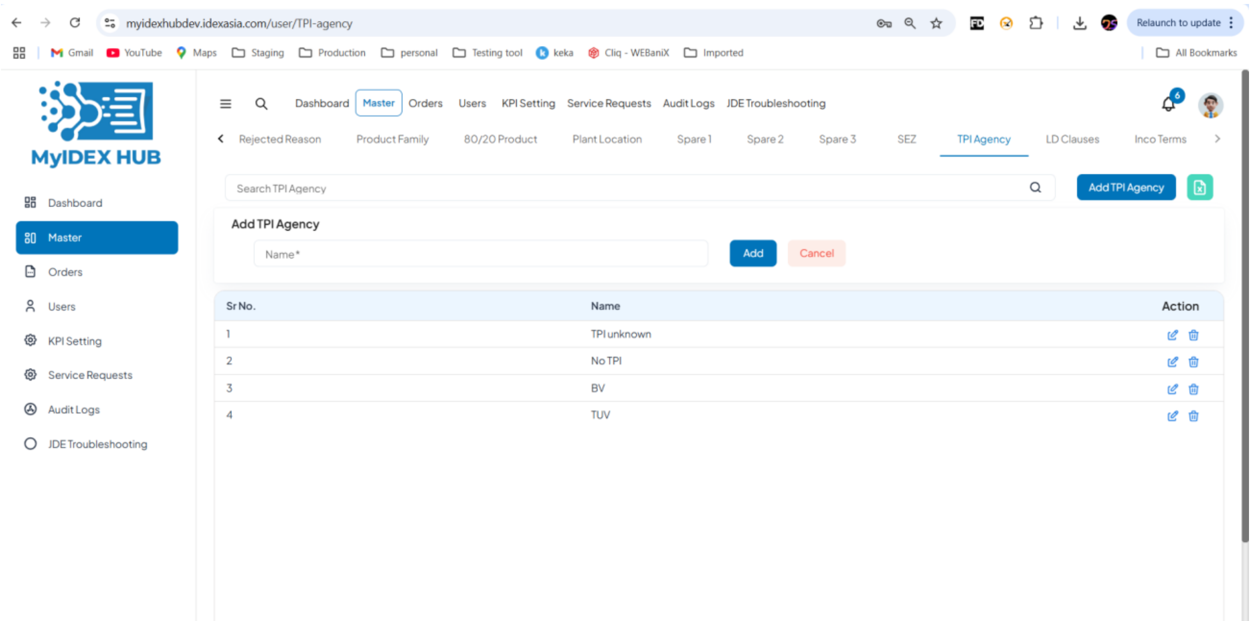


Figure 1: TPI Agency management screen.

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.

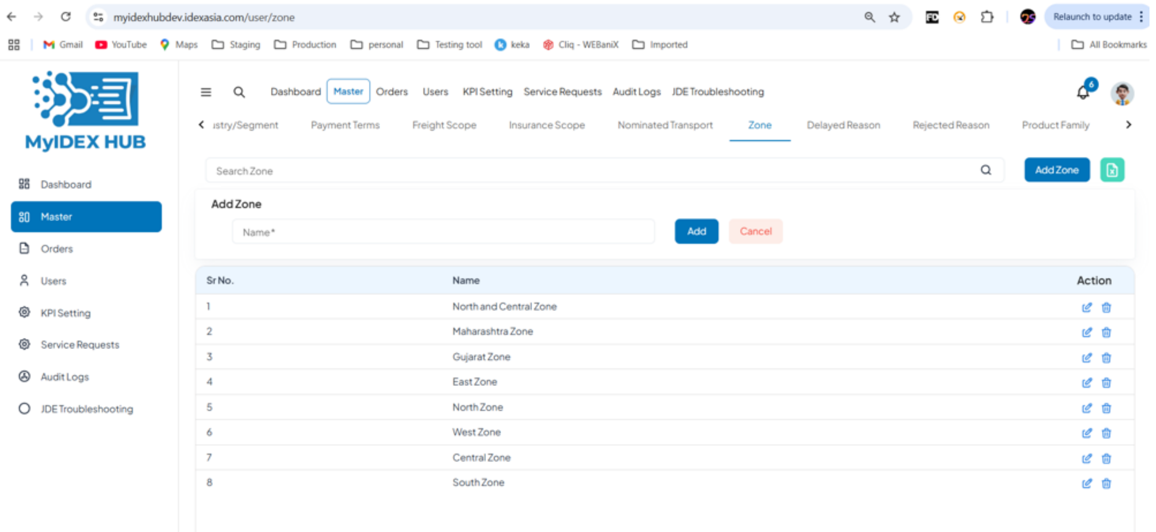
3. To delete a TPI agency, click the trash bin (delete) icon under the 'Action' column.

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.



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.

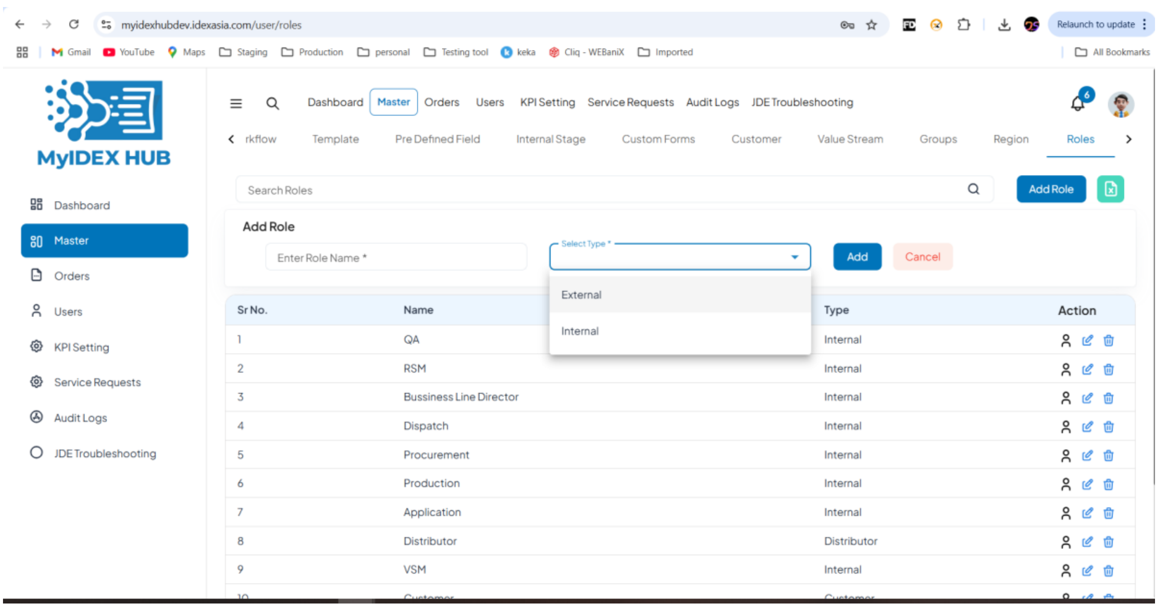
2. Select the 'Roles' sub-tab from the top menu.

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:



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.

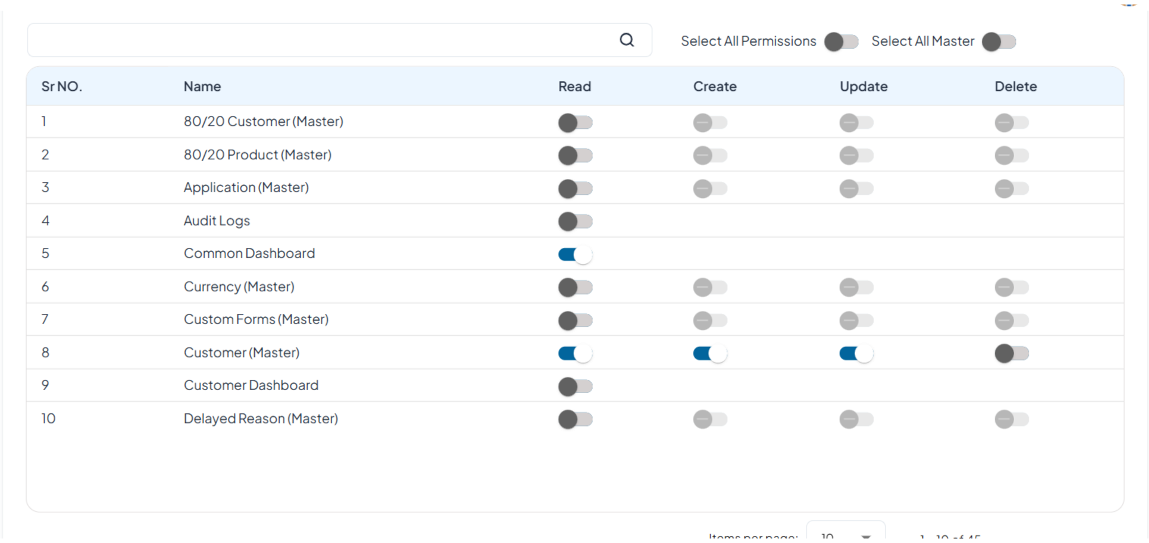
1. Each row represents a module or feature in the system.

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:



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.

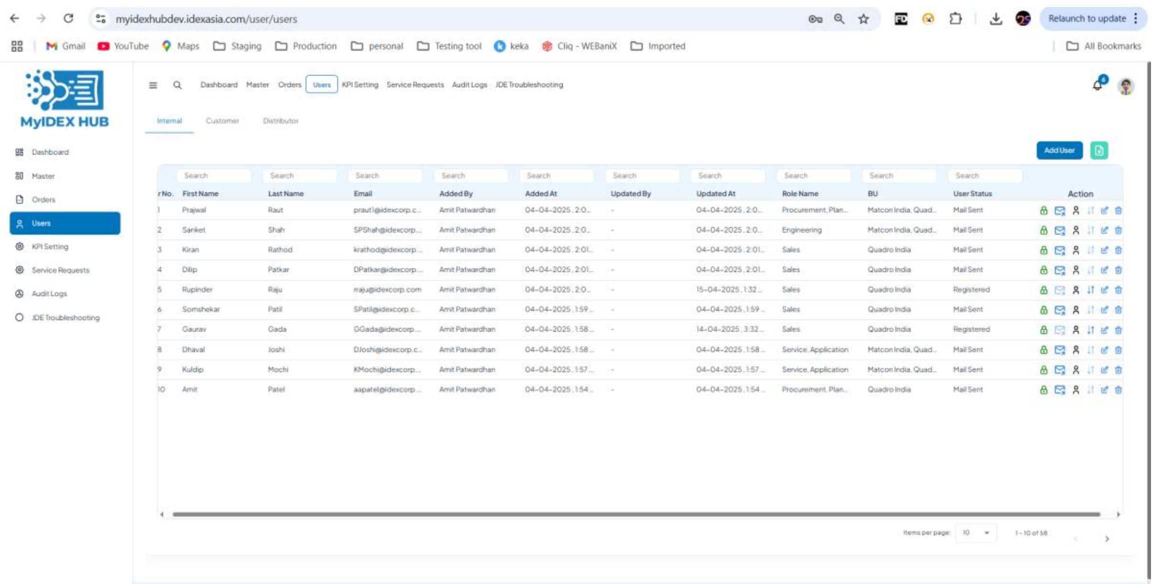
User are Divided into 3 parts:

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.



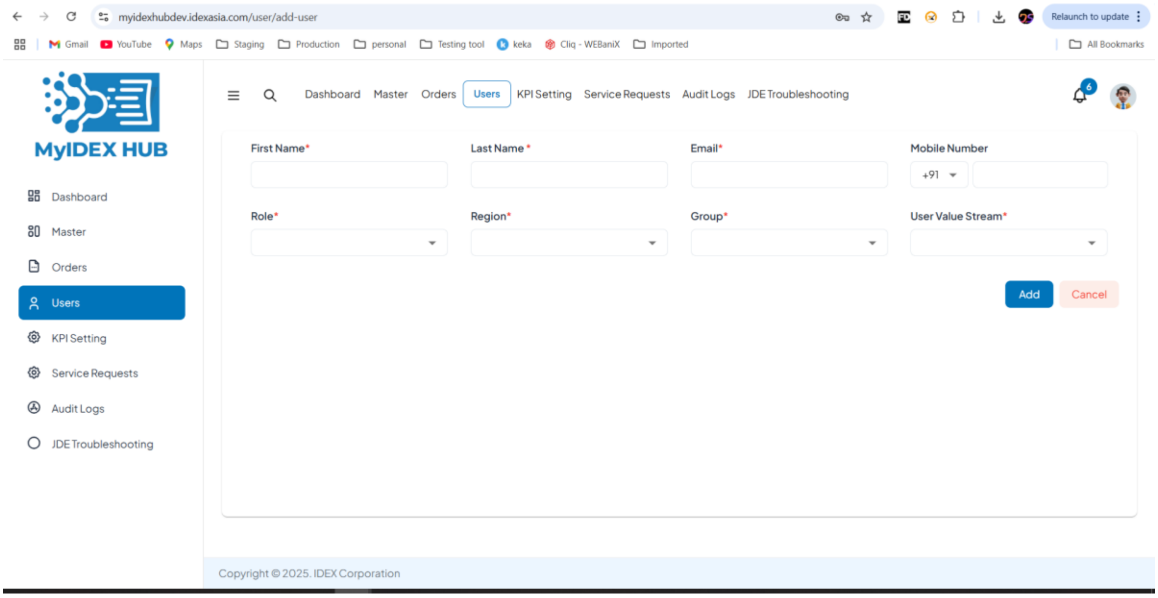
The following icons are used on this page:

- 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.



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.

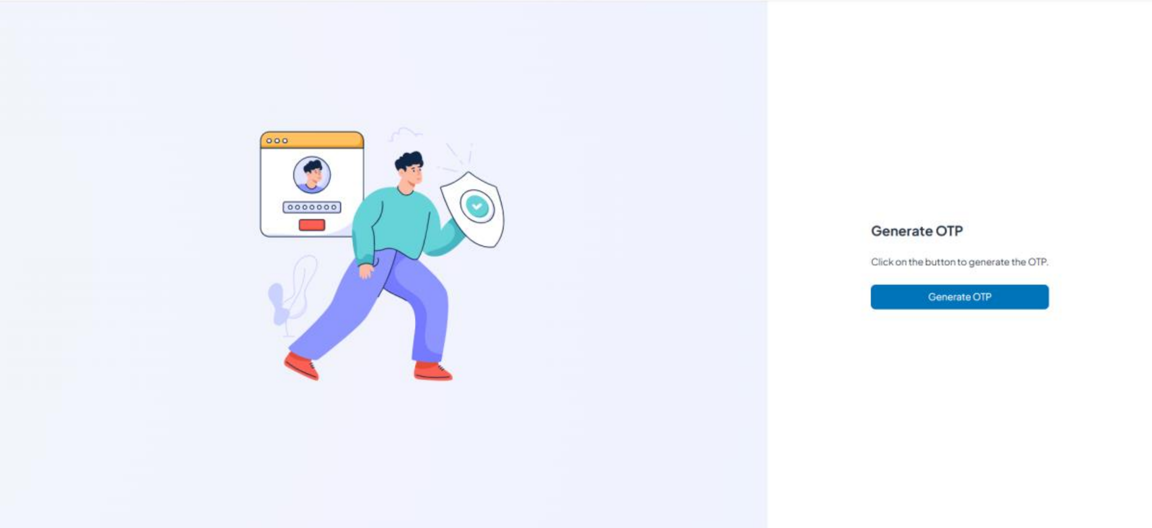
When creating Admin L2 from Admin L1:
1) The region and groups can be selected by the user.
2) All Business Units (BUs) are selected by default.

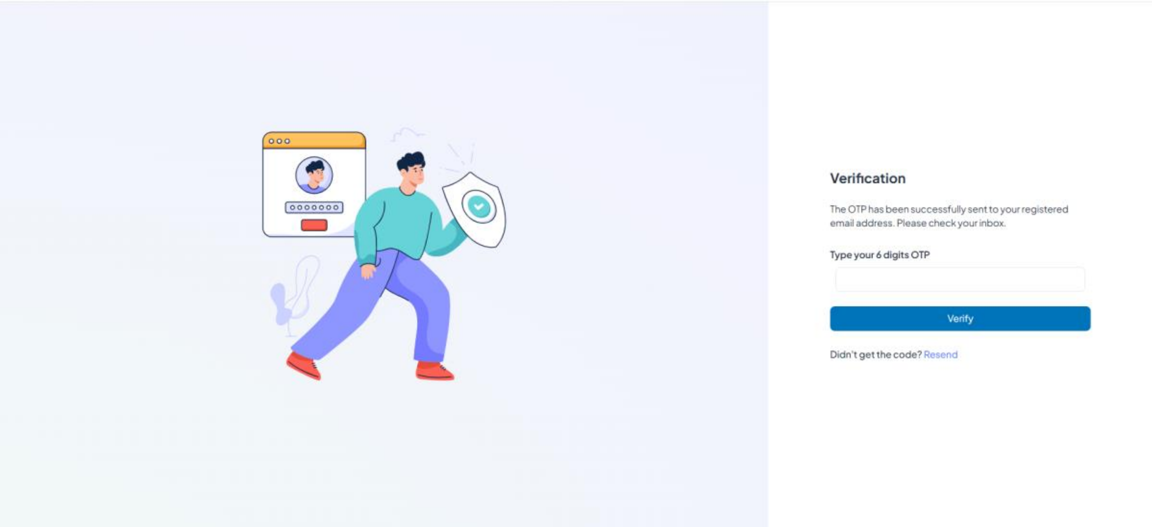
When creating Admin L3 from Admin L1:
1) The region, groups, and BUs will be selected by the user.

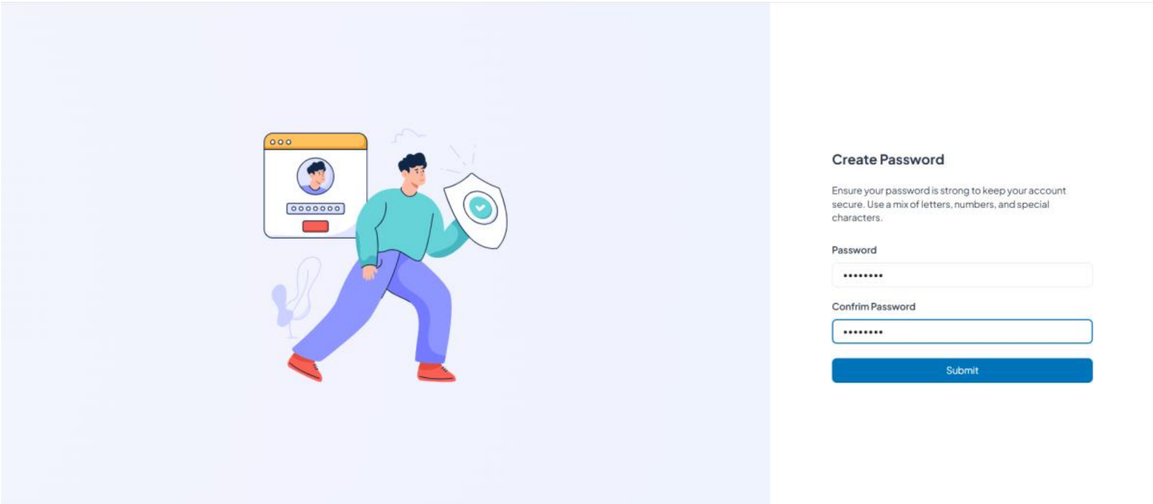
When creating Admin L3 from Admin L2:
1) The region is selected by default.
2) Groups and Business Units (BUs) are selected by user.

When any user is created by Admin L3:
1) The region and groups are automatically selected.
BUs 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.



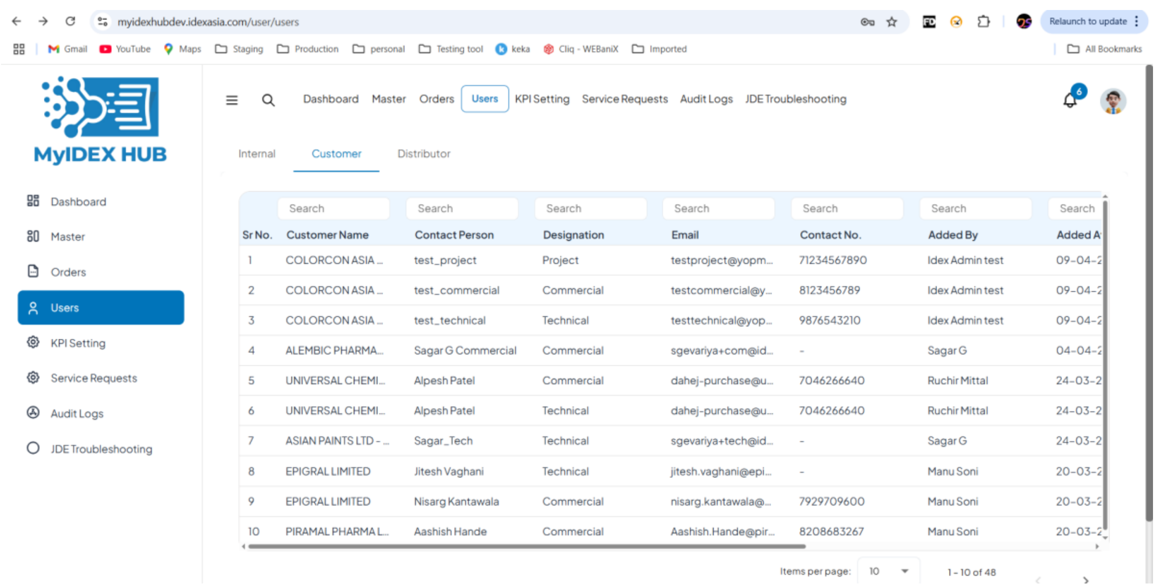




Customer User Section

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 A
1	COLORCON ASIA ...	test_project	Project	testproject@yopm...	71234567890	Idex Admin test	09-04-2
2	COLORCON ASIA ...	test_commercial	Commercial	testcommercial@y...	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...	Alpesh Patel	Commercial	dahej-purchase@u...	7046266640	Ruchir Mittal	24-03-2
6	UNIVERSAL CHEMI...	Alpesh 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	EPIGRAL LIMITED	Jitesh Vaghani	Technical	jitesh.vaghani@epi...	-	Manu Soni	20-03-2
9	EPIGRAL LIMITED	Nisarg Kantawala	Commercial	nisarg.kantawala@...	7929709600	Manu Soni	20-03-2
10	PIRAMAL PHARMA L...	Aashish Hande	Commercial	Aashish.Hande@pir...	8208683267	Manu Soni	20-03-2

Items per page: 10 1 - 10 of 48

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

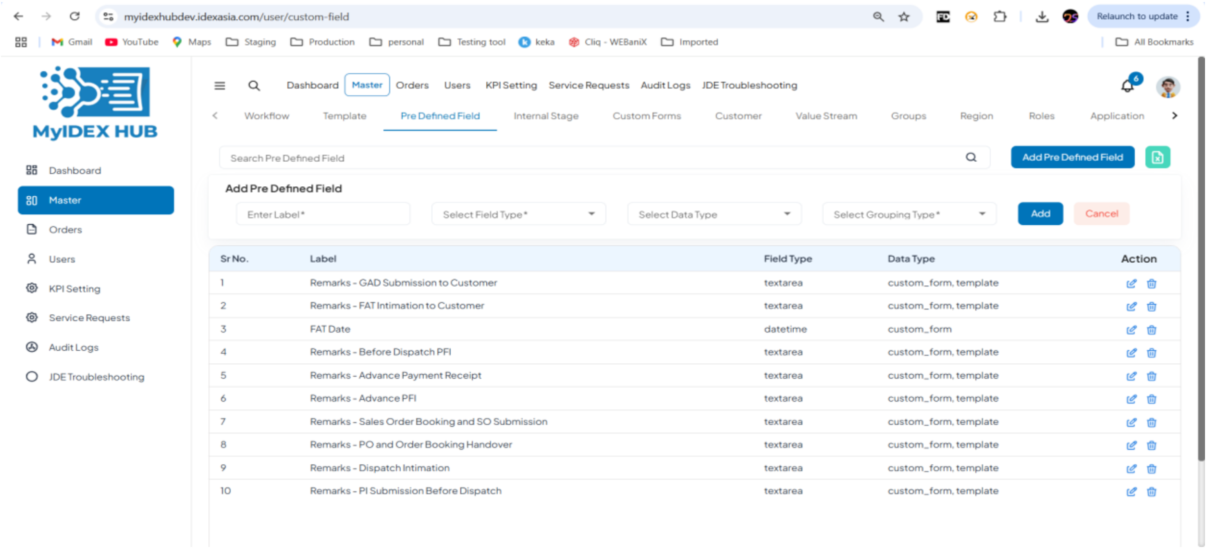
5. Optionally, choose the Grouping Type if applicable.(SO fields, OI form etc.)

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.

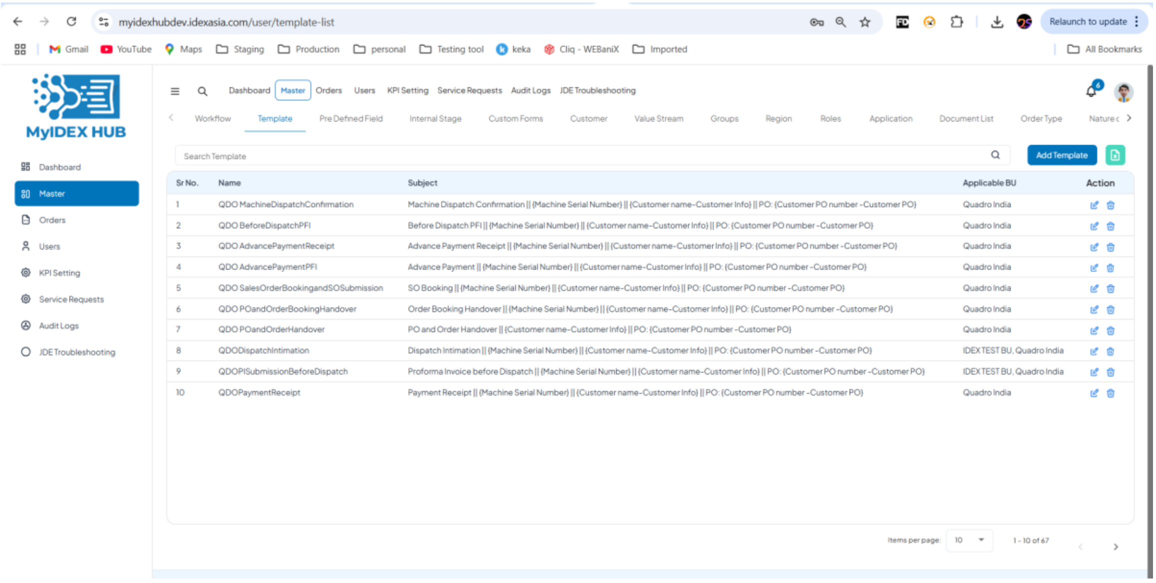
9. To delete an entry, click the trash (delete) icon under the 'Action' column.


myidexhubdev.idexasia.com/user/custom-field
Relaunch to update
Gmail YouTube Maps Staging Production personal Testing tool keka Cliq - WEBaniX Imported
All Bookmarks
MyIDEX HUB
Dashboard
Master
Orders
Users
KPI Setting
Service Requests
Audit Logs
JDE Troubleshooting
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
Add Pre Defined Field
Enter Label *
Select Field Type *
Select Data Type
Select Grouping Type *
Add
Cancel
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.



Step 2: Add New Template

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

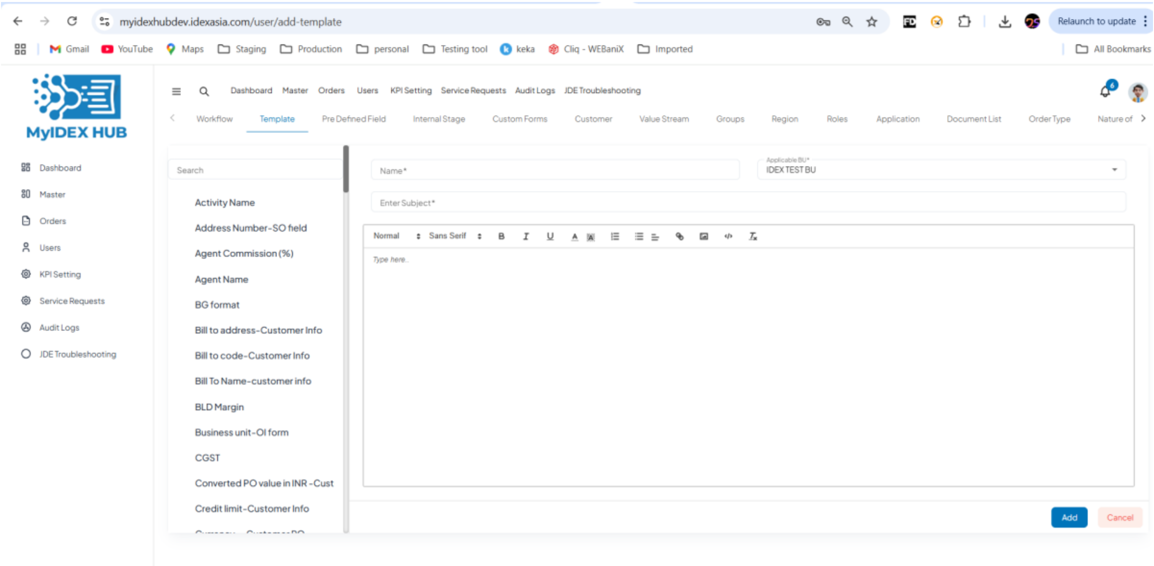
Step 3: Fill Template Details

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.

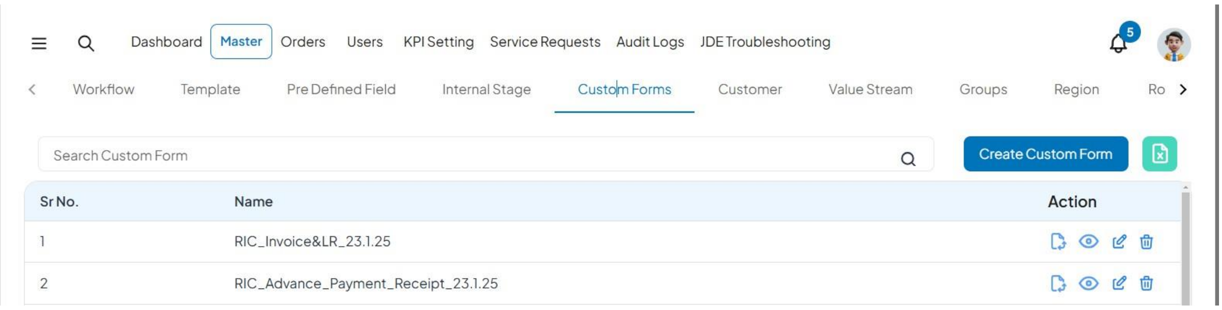
Custom Form Master

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.

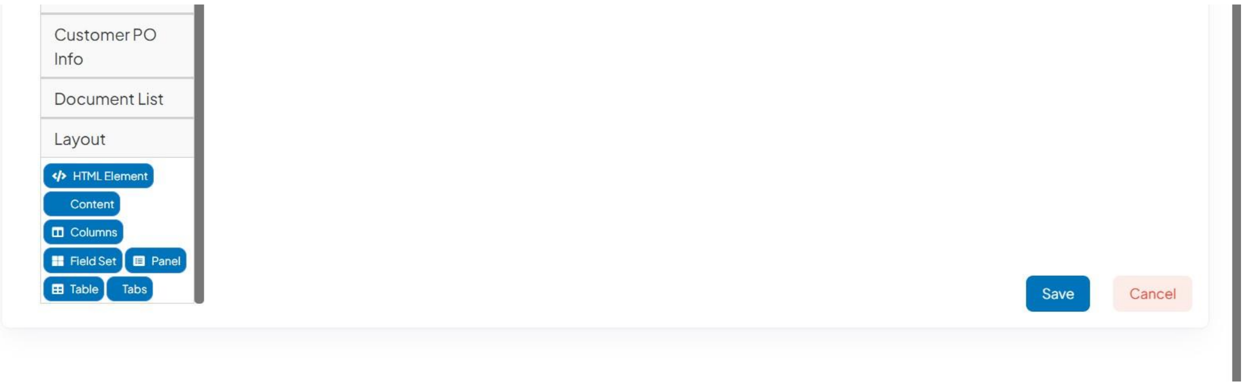
Step-by-Step Instructions

Step 1: Insert a Panel

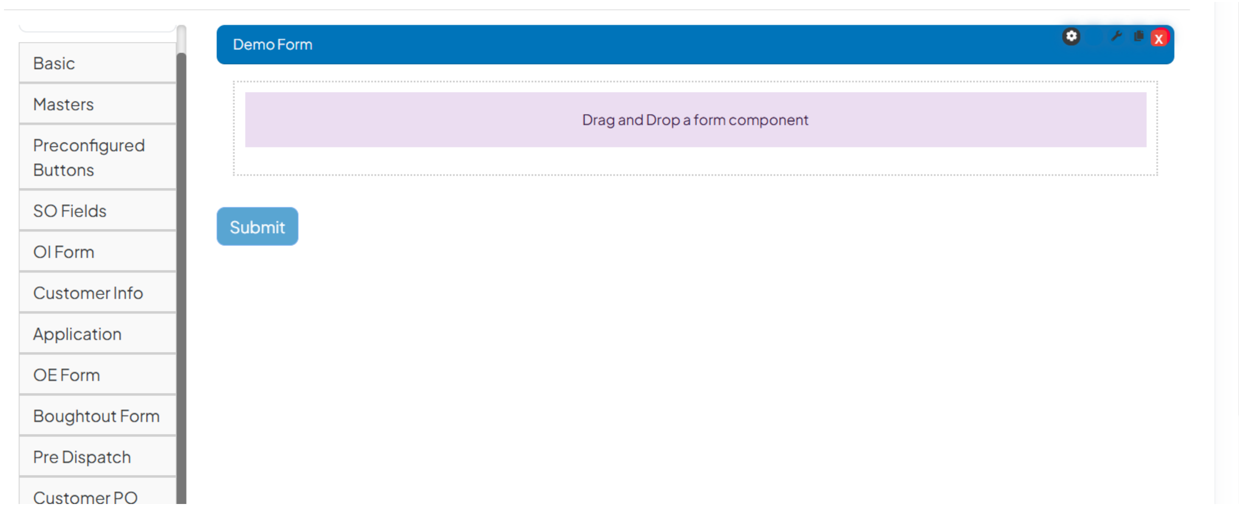
1. Open the Custom Form Master under Masters tab.



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



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

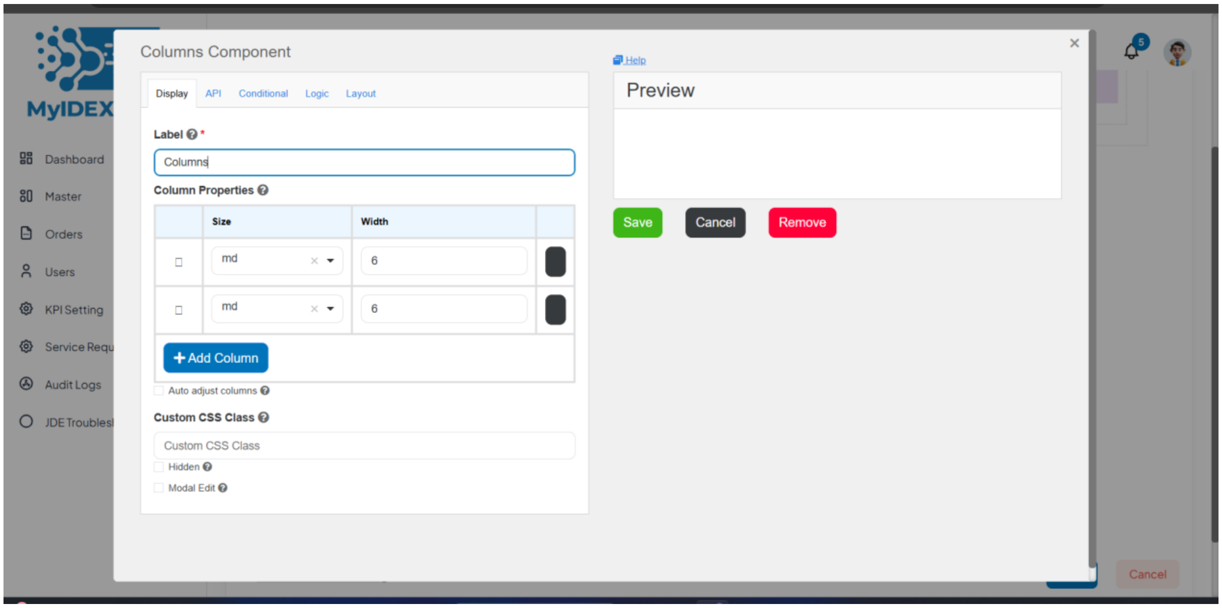


Step 2: Insert Input Controls

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:
   - **Label**: Set a meaningful name.
   - **Key**: Do not do any changes in key
   - **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.

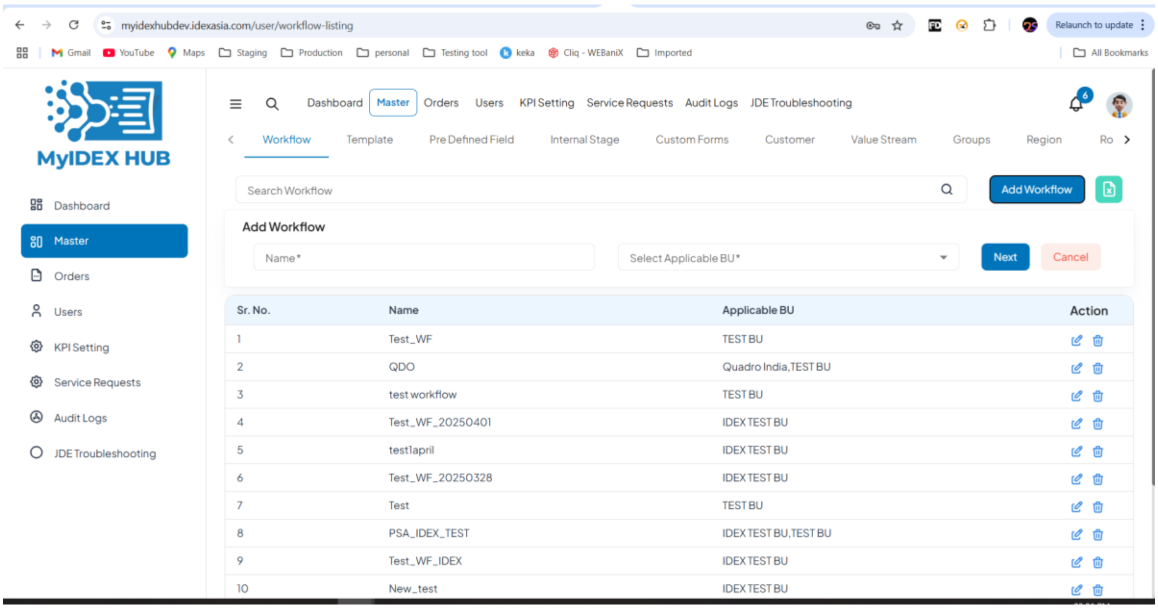
WorkFlow Master

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.

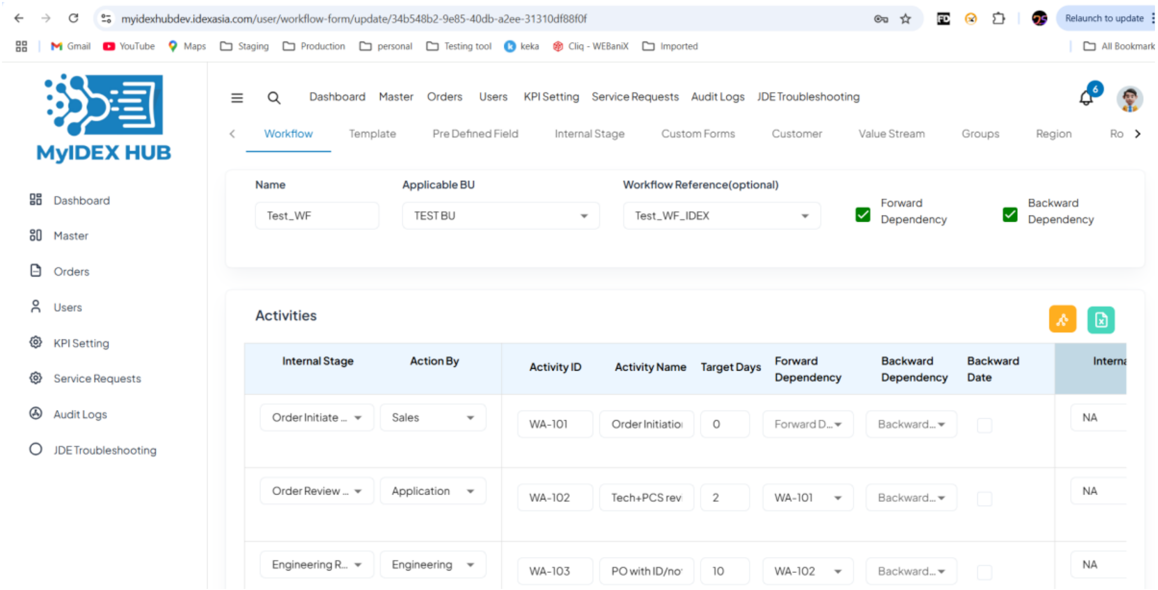
1. Workflow Listing Page

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

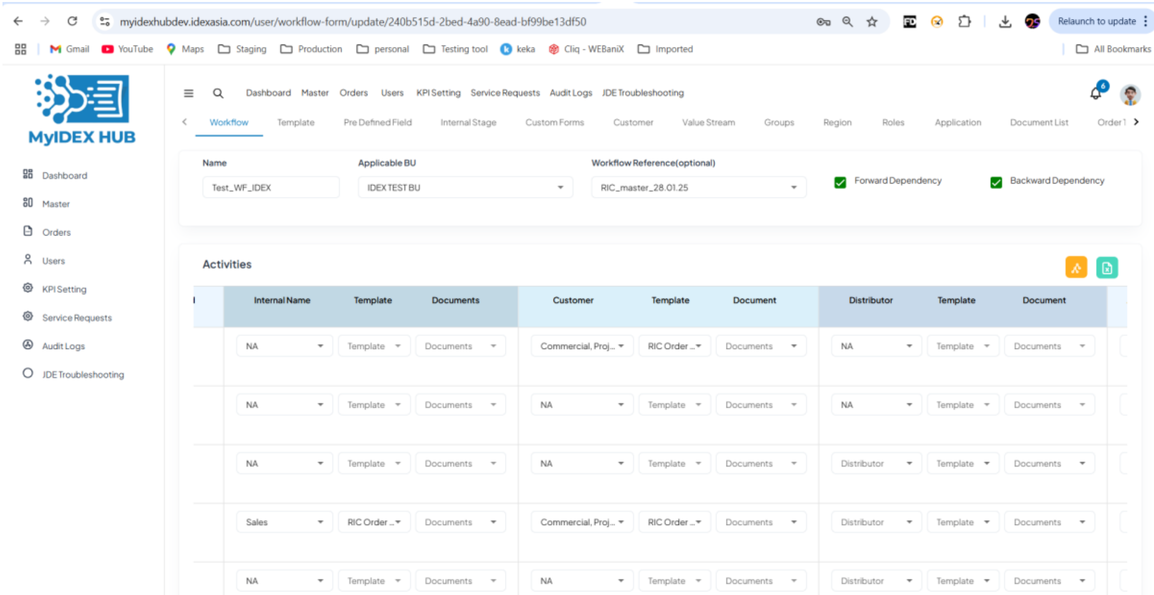


2. Workflow Form Page

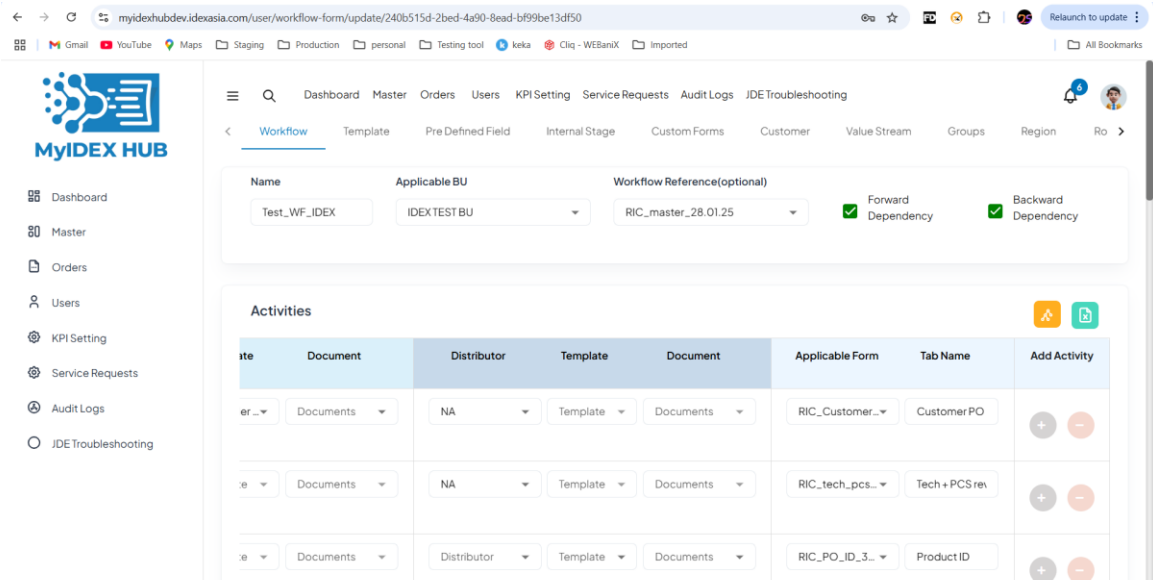
This section is used for creating or updating workflow details including associated business unit(multiple), reference workflow, and defining activity steps.



- 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.



- 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.



- **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**.

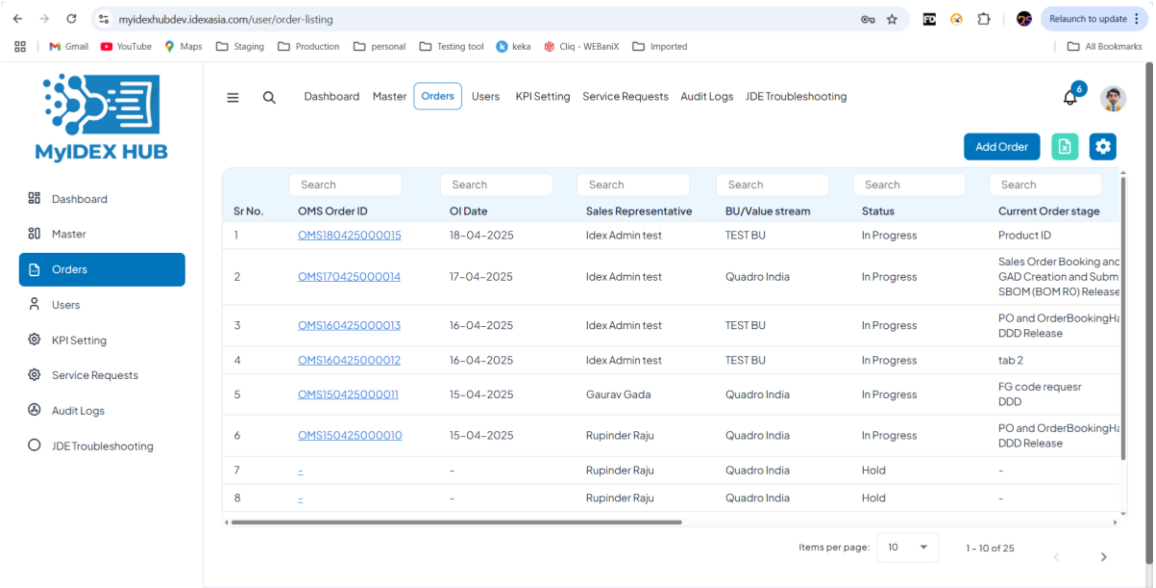
Order Creation & Listing

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:



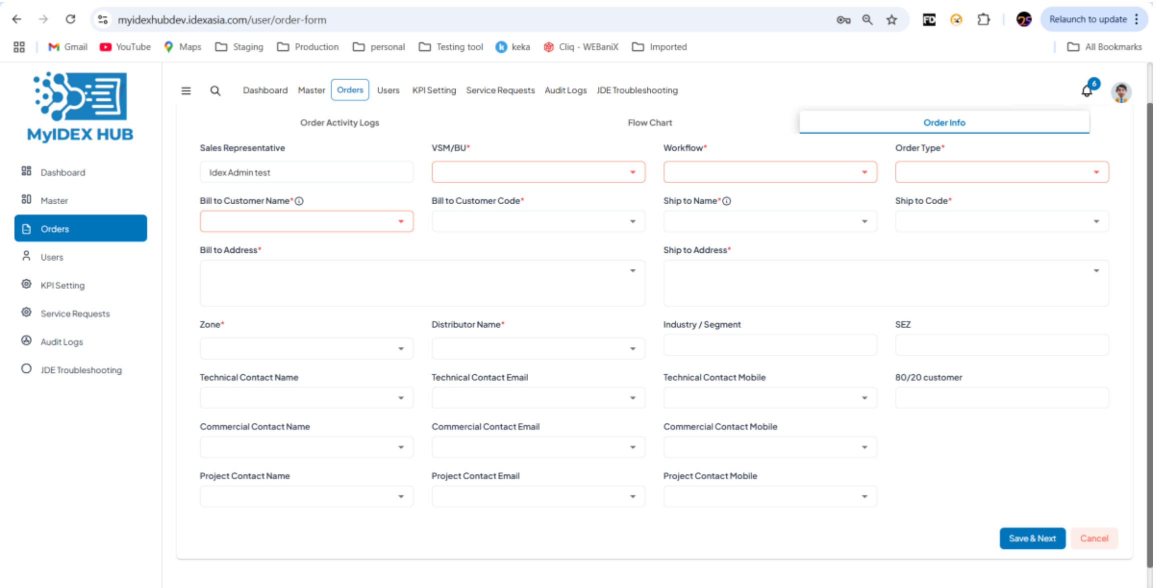
• The gear (settings) icon allows the user to customize the visible columns on the order listing page.

• 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:



• **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).

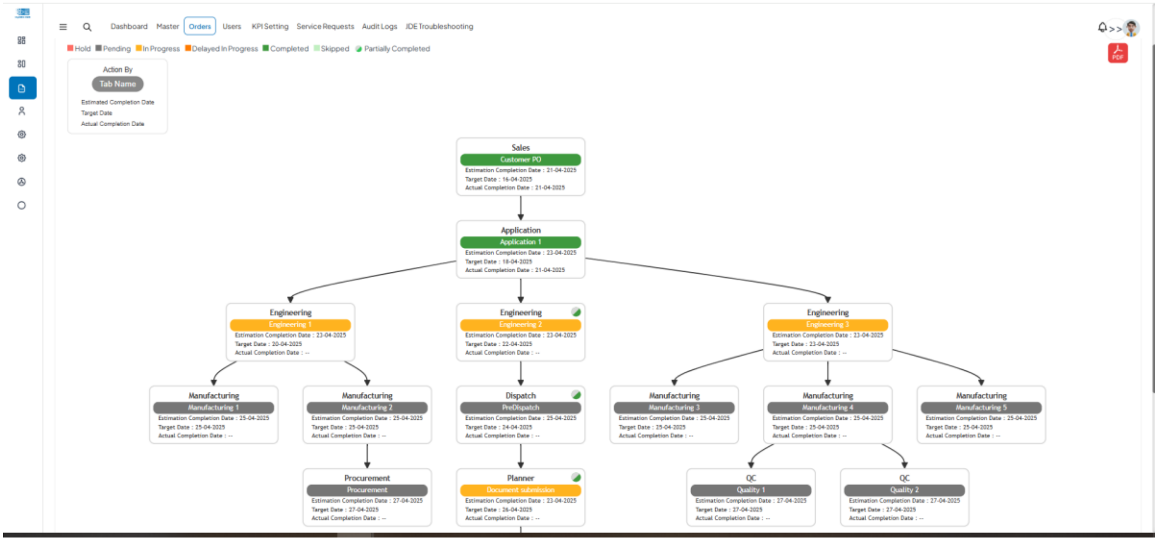
• **Zone** – Values are fetched from the Zone Master.

• **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.

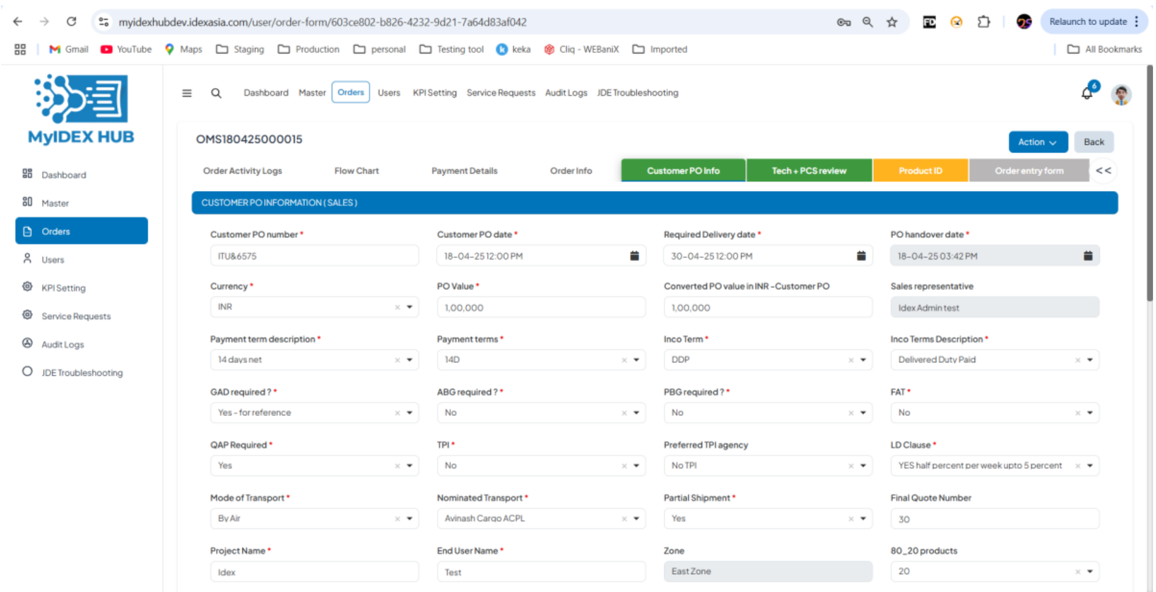
3. Flowchart of order Wokflow

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**.

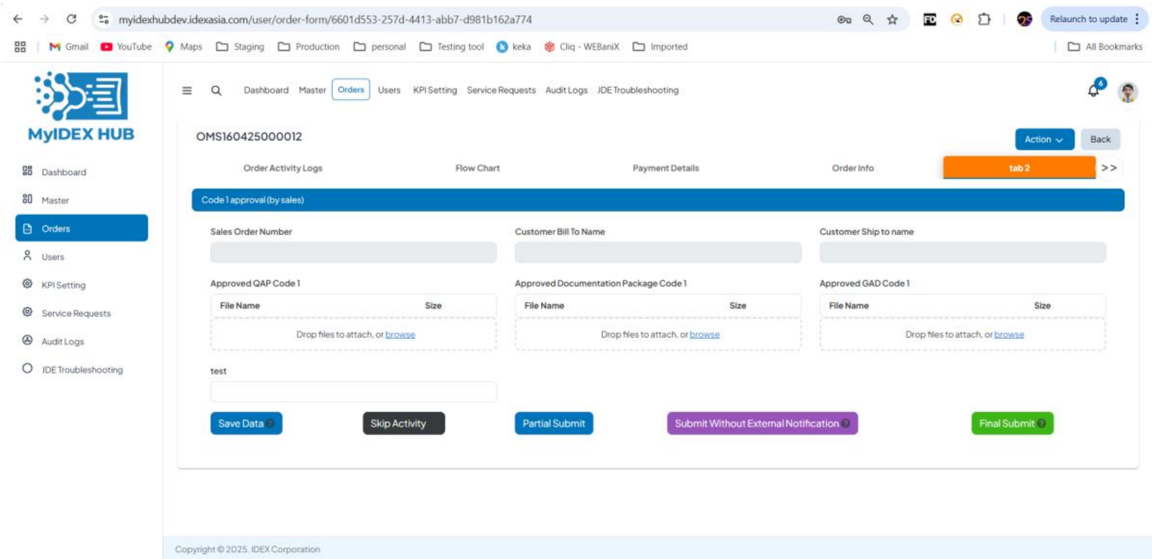


- **Hold**: Indicates that the order is currently on hold. All *In Progress* activities are highlighted in **red**.
- **Pending**: Indicates that the activities are yet to begin. The activity color is **gray**.
- **In Progress**: Indicates that activities are currently ongoing. The activity color is **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



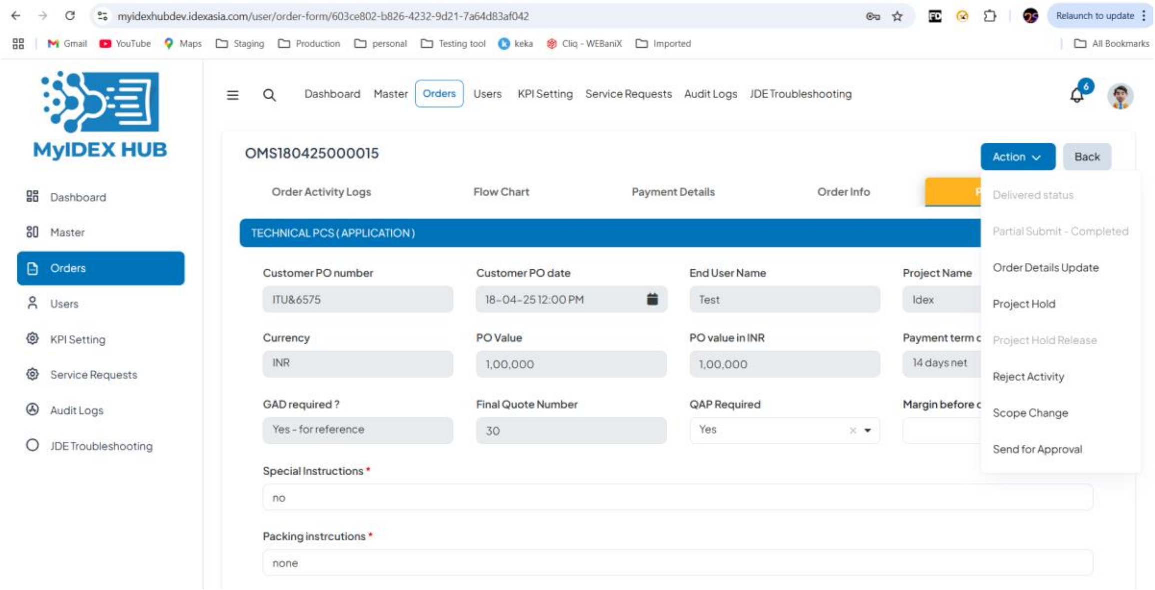
- **OMS ID** is displayed in the top-left corner of the screen. It appears after the **first activity** of the order is submitted.
- The **top slide bar** displays the **Tab names** of all the different activities that were defined during **workflow creation**. These tabs also indicate their **current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



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:



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

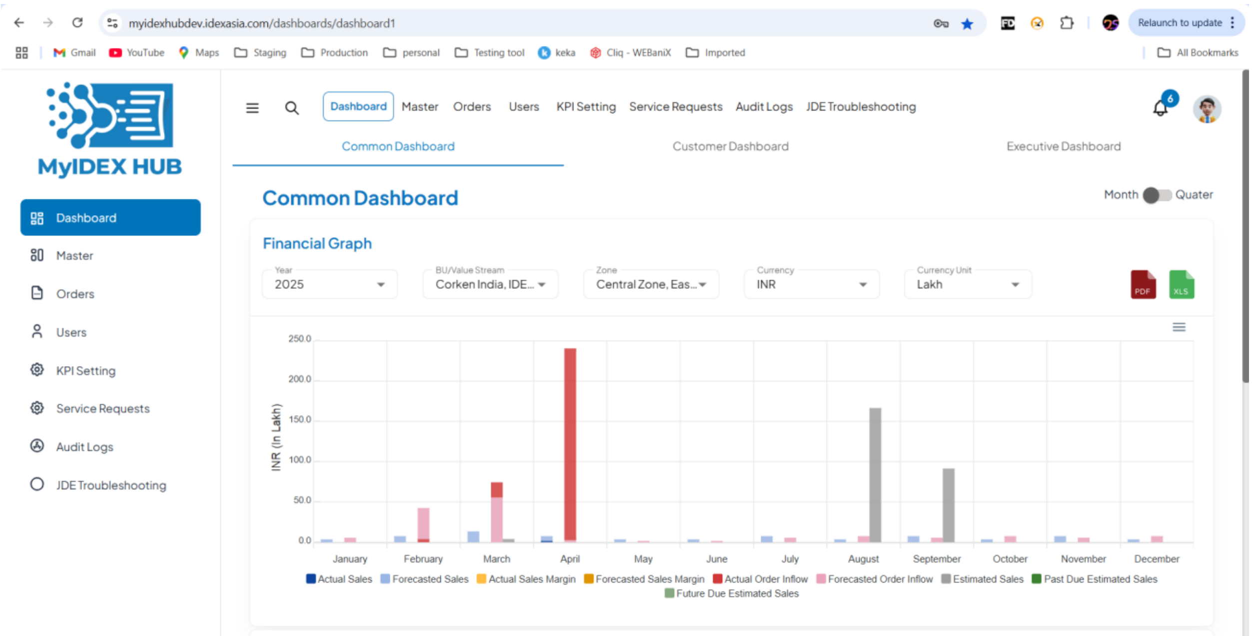
- **Send for Approval**
  Used when the *margin before order execution* is **less** than the required margin set by the BLD person.
  → This action sends an **approval email** to the BLD person of the selected BU.
  → The BLD person reviews and approves the margin.
- **Scope Change**
  Used to **revert 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' .

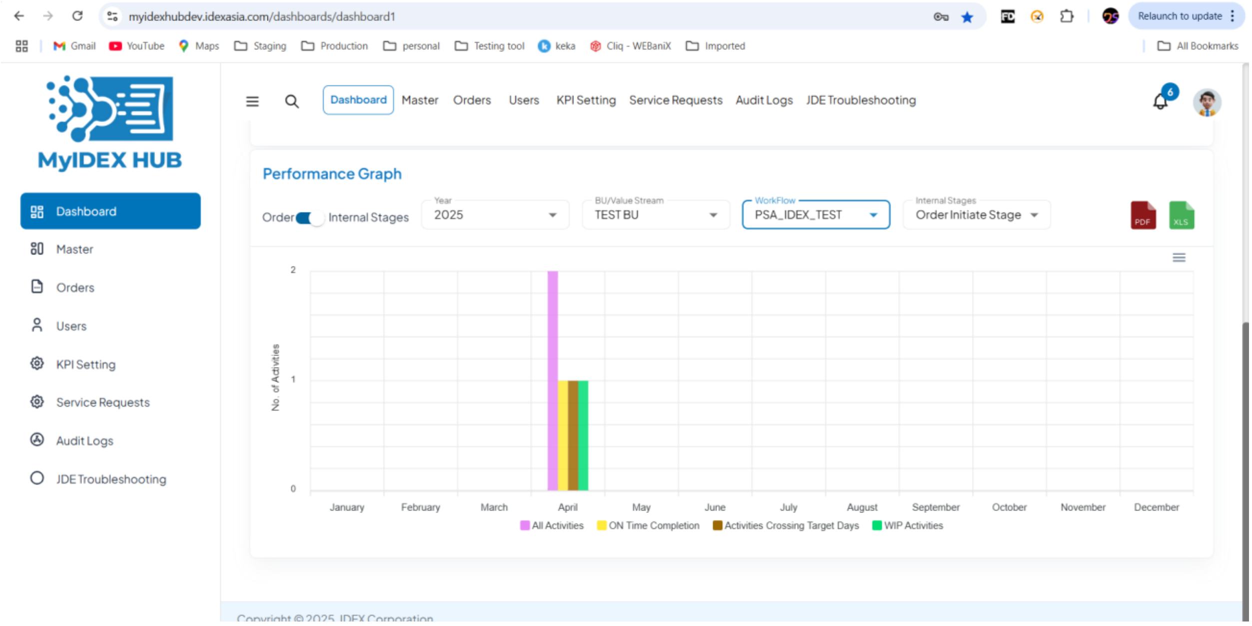
1. Financial Graph



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

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.

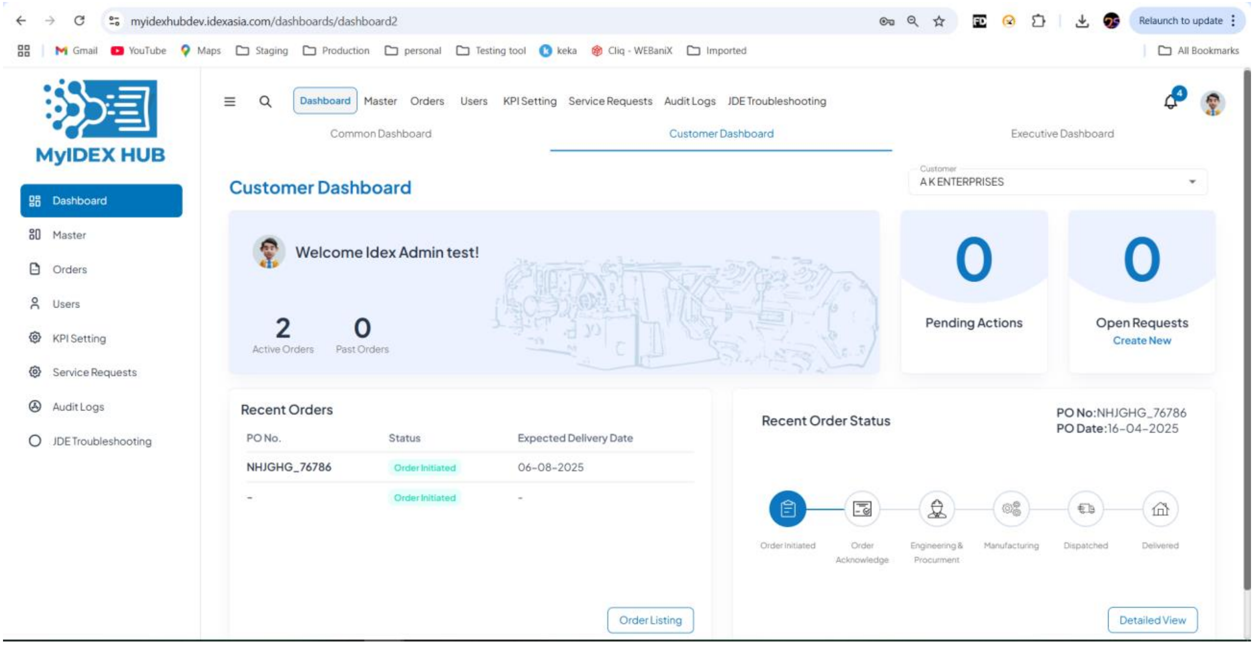
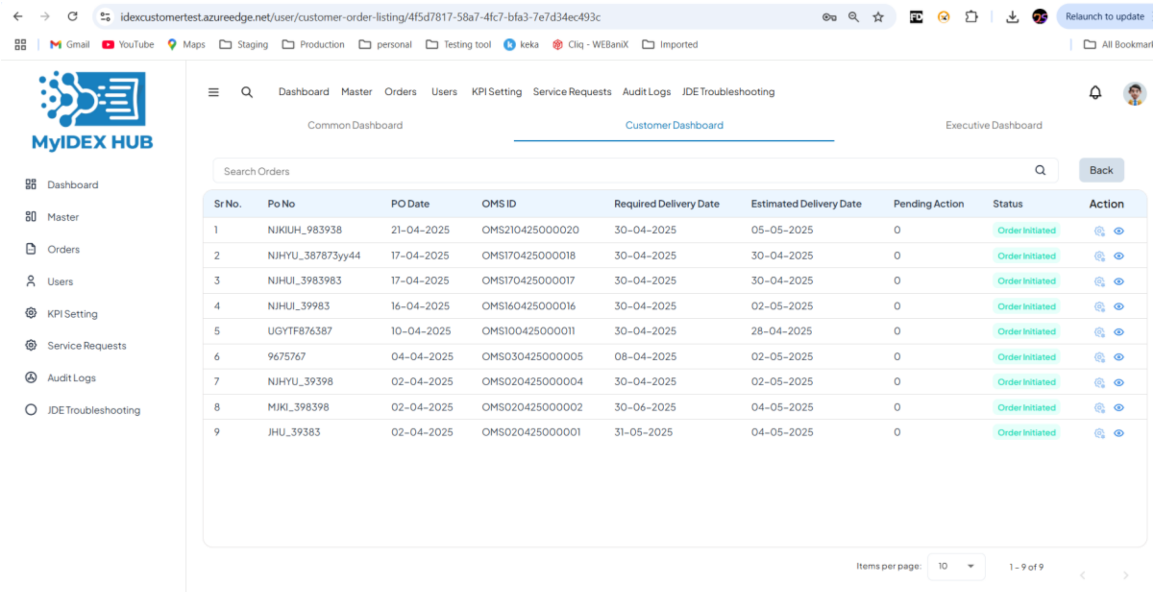


Figure: Customer Dashboard Interface

- **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.

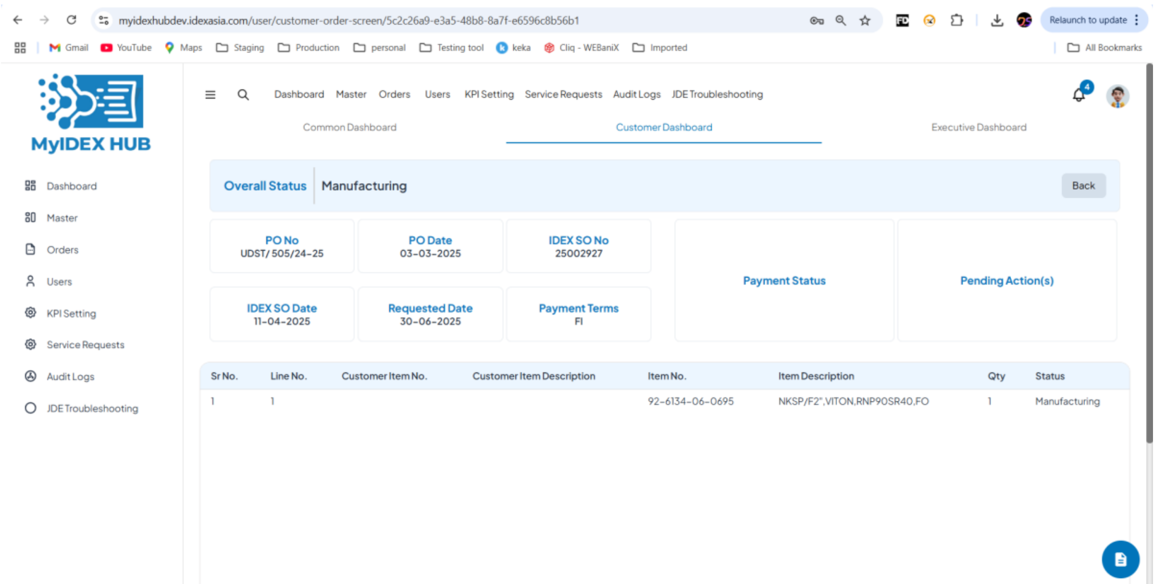


- **Recent Order Status**: Shows the status of the most recent order using a visual order tracker, along with the PO number and PO date.
- **Order Tracker Stages**:
- - **Order Initiated**: Triggered when the first submission is made by the sales team, generating the OMS-ID.
- - **Order Acknowledged**: 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.



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

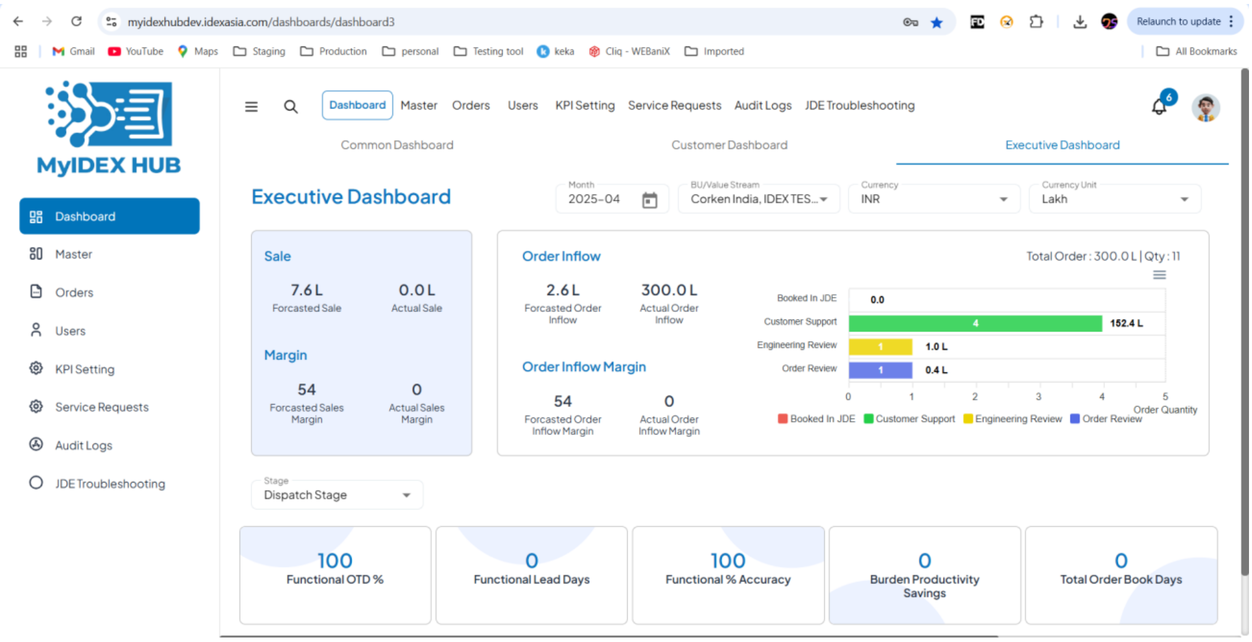


Figure 1: Executive Dashboard Interface

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 : (Completed withing target days / Total number of completed stages) * 100

2. **Functional Lead Days** : The system displayed the -- (Sumation of all Stage's actual days / 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

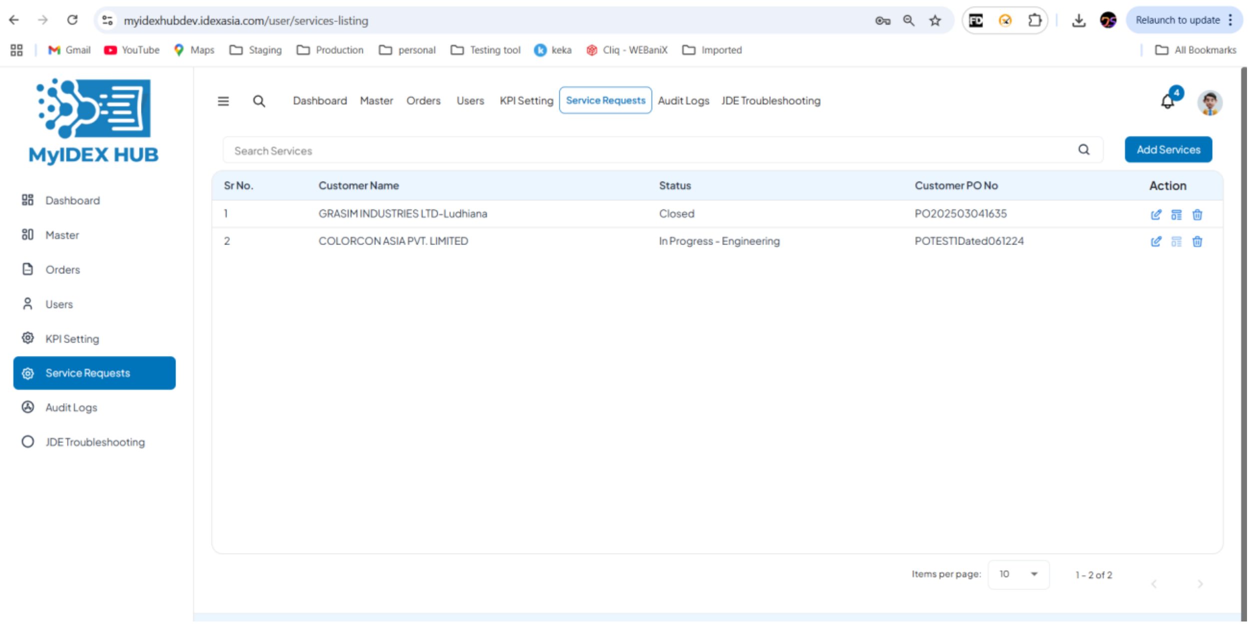
Service Request Module

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.

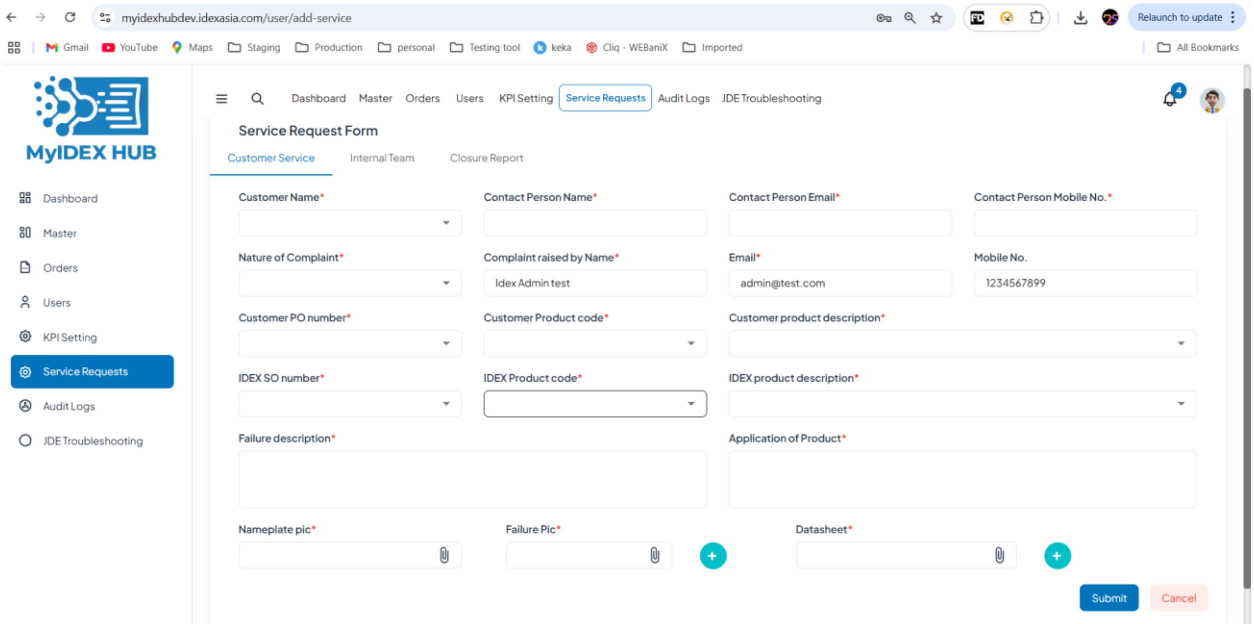
1. Service Requests Listing

- 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.



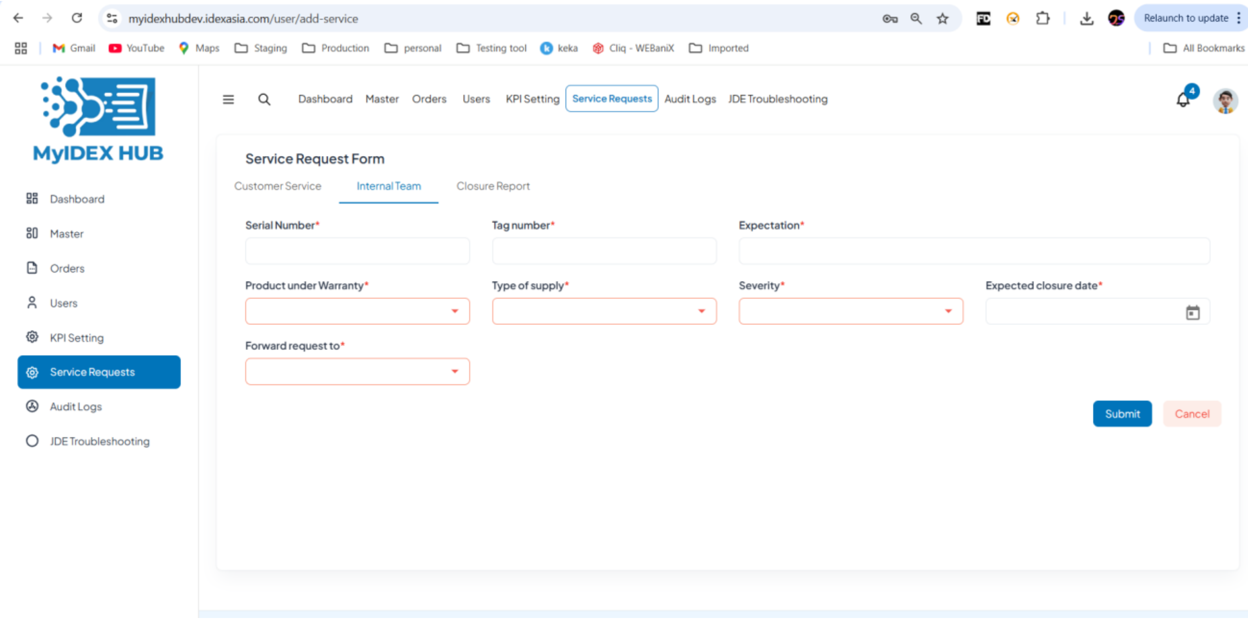
2. Customer Service Request Form

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:



- **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

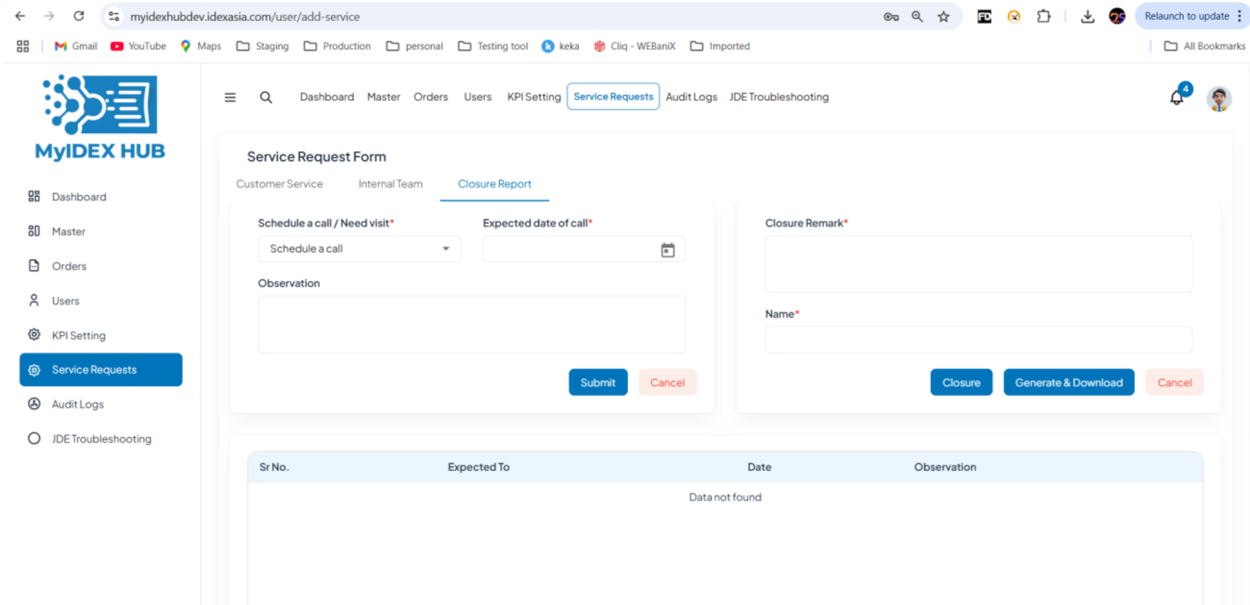
3. Internal Team Form



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



- 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.