Hilal Computers|Northstar Technology|HCTTC|NCT

Hilal Sales Employee Portal Scope – Version 1.0

Document Information:

Project Name : Hilal Sales Employee Portal			
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Project Manager	Rajesh N	Document Date	12/02/2019
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Version History:

Version Date	Created / Reviewed by	Version	No. of pages	Affected Pages
12/02/2019	Manikandan S / Avinash R	Version 1.0	9	All Pages

Acceptance:

Accepted by				
Project Manager, Employee Portal (Al Hilal Group)				
Yes ☒	No ☐	Abey Varghese Project Manager		
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Contents

Introduction

The main objective of this Sales Employee Portal is to get the Customer Sales related information to be viewed by the respective Sales Employee of this organization. Since they don't have any access to SAP B1 ERP, they can to use this portal to get some information related to their Sales activities. Only they can see the Sales related data related to user. Sales Employee wise login to be provided and they can use to access the portal. This portal will help the Sales employee to get more business for their customers, they don't want to depend on the Sales Co-ordinator to get the details.

It's a Web Application in responsive design, so that it will be compatible to view in the mobile or Tab. The Screenshots showed in this document is only for the field level details freezing, the actual design may vary from the below screenshots.

Note : The accuracy of the data is based on the proper inputs keyed in the SAP B1 ERP on time.

Below are the screens available in this Portal and covered in the scope

- **Login**
- **Customer Order Status**
- **Customer Purchased History**
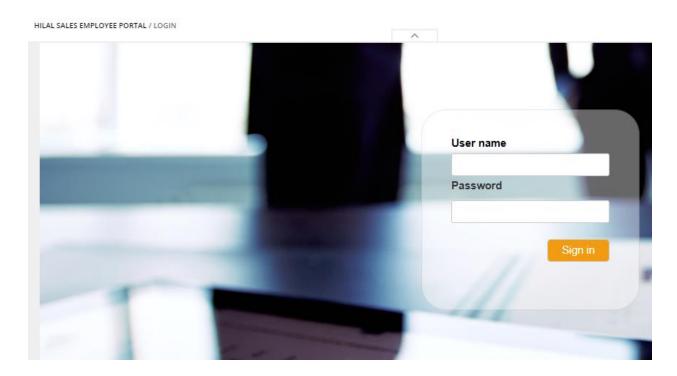- **Customer Outstanding Status**
- **Stock Status**

Login Screen

Separate URL will be provide to access the Portal. Based on the respective user logins, they can use the below screen to access the portal.
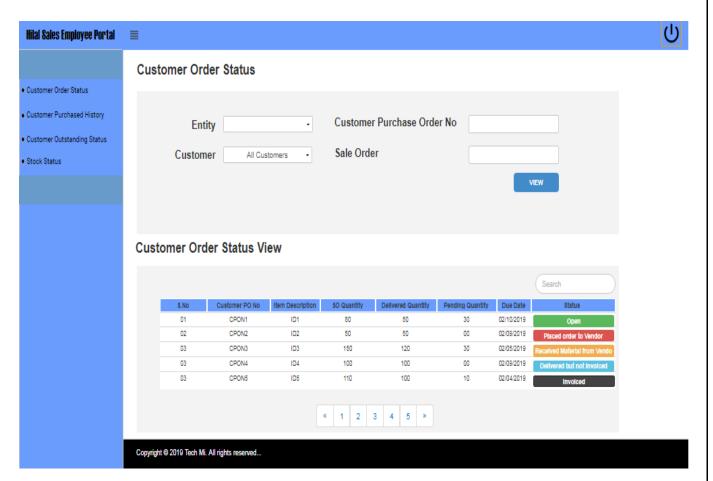
Customer Order Status

Sales Employee can see the Customer Order status based on the inputs in the appropriate inputs boxes. They can choose the Entity, Customer (Particular Customer or All customers), Customer PO number or the Sales Order number and click the View button to see the status of the Customer Order. The order status are classified into 5 stages. They are the below
1. Open
2. Placed Order to Vendor
3. Received Material from Vendor
4. Delivered but not Invoiced
5. Invoiced (We will try to give this feature in the same screen, if it not possible, then we will give a separate report this)

Below the screenshot of the Customer Order Status Report with all the agreed fields
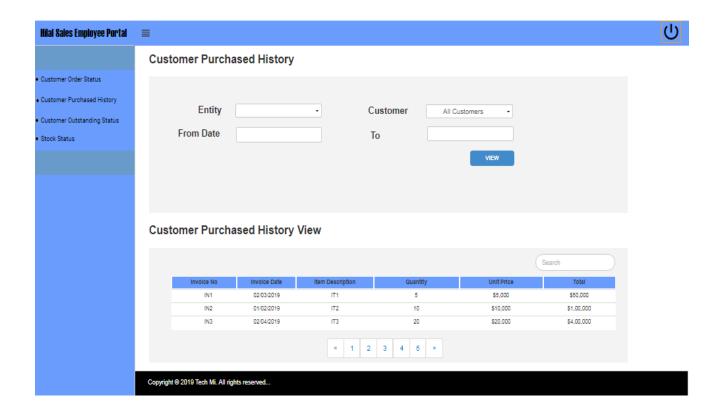
Customer Purchased History

Sales Employee can see the Customer Purchased History based on the inputs in the appropriate inputs boxes. They can choose the Entity, Customer (Particular Customer or All customers), From Date & To Date and click the View button to see the history of the Customer purchases between the period.

Below the screenshot of the Customer Purchased History Report with all the agreed fields
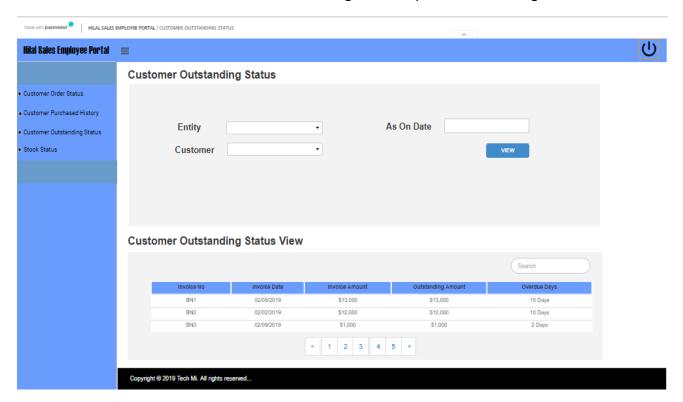
Customer Outstanding Status

Sales Employee can see the Customer Outstanding bill status based on the inputs in the appropriate inputs boxes. They can choose the Entity, Customer (Particular Customer), As on Date and click the View button to see the Invoice outstanding status of the selected Customer.

Below the screenshot of the Customer Outstanding Status Report with all the agreed fields

Hilal Sales Employee Portal ≡

- Customer Order Status
- Customer Purchased History
- Customer Outstanding Status
- Stock Status

Customer Outstanding Status

| Entity | [▾] | As On Date | [   ] |
| Customer | [▾] | | VIEW |

Customer Outstanding Status View

Search [   ]

Invoice No	Invoice Date	Invoice Amount	Outstanding Amount	Overdue Days
BN1	02/05/2019	$13,000	$13,000	15 Days
BN2	02/02/2019	$12,000	$12,000	10 Days
BN3	02/09/2019	$1,000	$1,000	2 Days

« 1 2 3 4 5 »

Stock Status

Sales Employee can see the available Stock Status based on the inputs in the appropriate inputs boxes. They can choose the Entity and choose the appropriate filters and see the current stock status of the particular item. Which is the available stock at the time of running the report, system will not block the stock, so it is only for information to the Sales Employee and there is no guarantee for that stock to place the order. This is the new feature requested at that time of system study which is not in our initial scope.

Below the screenshot of the Stock Status Report with all the agreed fields