



AL HILAL GROUP

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Hilal Sales Employee Portal Scope – Version 1.0



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Accepted by				
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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 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**



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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.

HILAL SALES EMPLOYEE PORTAL / LOGIN

The login screen features a blurred background image of a person's hands typing on a keyboard. Overlaid on the right side is a white, rounded rectangular login form. The form contains two input fields: the first is labeled 'User name' and the second is labeled 'Password'. Below these fields is an orange button with the text 'Sign in' in white. The entire form is set against a light gray background.

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

Hilal Sales Employee Portal

Customer Order Status

Entity
Customer Purchase Order No

Customer
All Customers
Sale Order

VIEW

Customer Order Status View

Search

S.No	Customer PO No	Item Description	SO Quantity	Delivered Quantity	Pending Quantity	Due Date	Status
01	CPON1	ID1	80	50	30	02/10/2019	Open
02	CPON2	ID2	50	50	00	02/09/2019	Placed order to Vendor
03	CPON3	ID3	150	120	30	02/05/2019	Received Material from Vendo
03	CPON4	ID4	100	100	00	02/09/2019	Delivered but not Invoiced
03	CPON5	ID5	110	100	10	02/04/2019	Invoiced

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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

Hilal Sales Employee Portal

Customer Order Status

Customer Purchased History

Customer Outstanding Status

Stock Status

Customer Purchased History

Entity

Customer

From Date

To

VIEW

Customer Purchased History View

Search

Invoice No	Invoice Date	Item Description	Quantity	Unit Price	Total
IN1	02/03/2019	IT1	5	\$5,000	\$50,000
IN2	01/02/2019	IT2	10	\$10,000	\$1,00,000
IN3	02/04/2019	IT3	20	\$20,000	\$4,00,000

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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

Made with JustInMind | HILAL SALES EMPLOYEE PORTAL / CUSTOMER_OUTSTANDING_STATUS

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

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

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StockStatus

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

Hilal Sales Employee Portal

Customer Order Status

Customer Purchased History

Customer Outstanding Status

Stock Status

Stock Status

Entity

Item Hierarchy

Item Group

Brand

Model

Item

VIEW

Stock Status View

Search

Item Code	Item Hierarchy	Item Group	Brand	Model	Item Description	Available Stock
IC1	IH1	Laptop	Dell	Inspiron 14 3000 Series	Built in Dual Speakers	40
IC2	IH2	Mobile	Mi	Note5 Pro	Primary Camera	35
IC3	IH3	Headphone	JBL	E-B556	HD Clear Sound	24

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