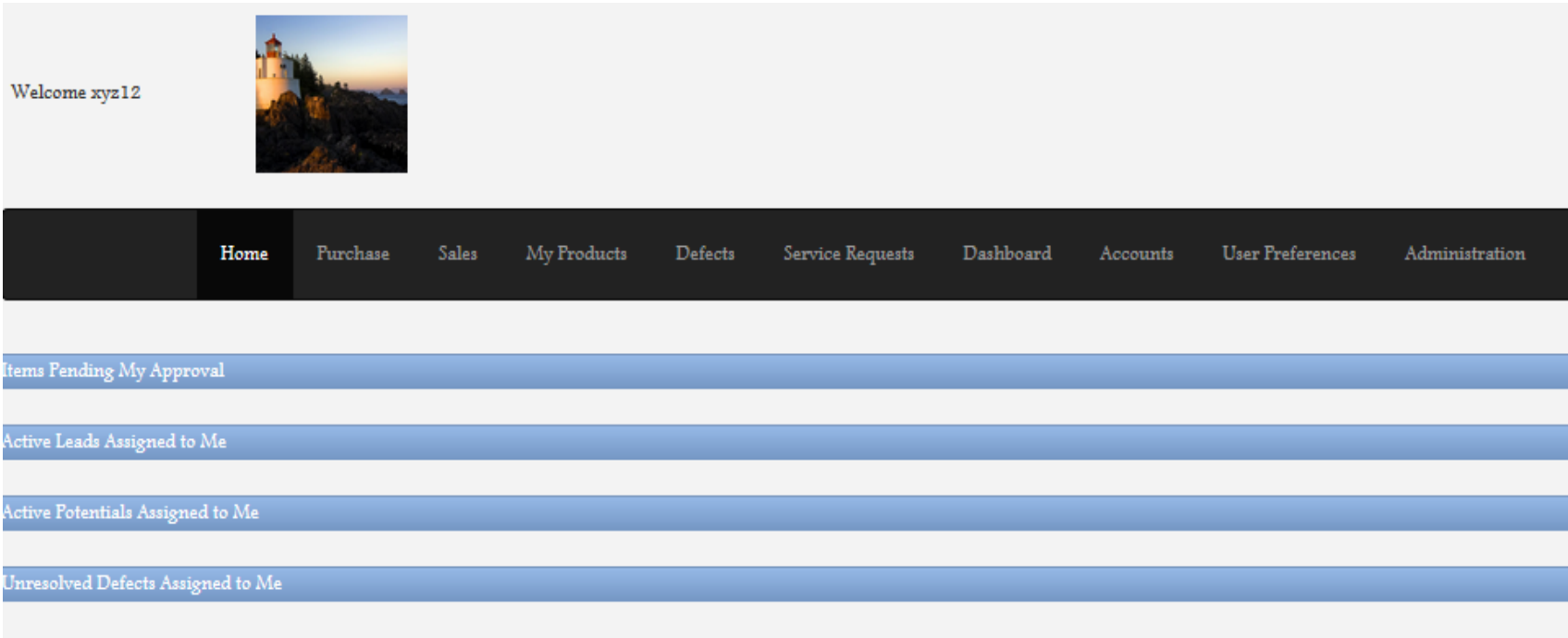


The screenshots here in this document are not displaying the latest theme/styling changes. But these screenshots demonstrate the functionality as a whole.

The home page:



Once the user logs in, can see some useful links. All these are expendables -

Home

Purchase

Sales

My Products

Defects

Service Requests

Dashboard

Accounts

User Preferences

Administration

Items Pending My Approval

RFQs


Filter By

RFQ#:

	RFQ#	RFQ Name	Specifications	Submit Date	Due Date	Location	Broadcast To
<input type="radio"/>	ra_468	Feb28_Rfq_11	Show!	Mar-4-2014 6:32:52 PM		Show!	Show!

The Purchase Screen

Welcome xyz12



Home

Purchase

Sales

My Products

Defects

Service Requests

Dashboard

Accounts

User Preferences

Administration

All Requirement Details

All RFQ Details

All Invoices Sent to Us

All Purchase Orders

RFQ details floated by the organization -

HomePurchaseSalesMy ProductsDefectsService RequestsDashboardAccountsUser PreferencesAdministration

All Requirement Details

All RFQ Details

All RFQs

Filter By

RFQ#:

Category:

Status:

From Date (Due) :

To Date (Due) :

Filter

		RFQ#	RFQ Name	Currency	Specifications	Submit Date	Due Date	Location	Approval Status	All Quotes	All Shortlisted	Purchase Order	Broadcast To	Active Status
<input type="radio"/>	Edit	ra_533	ST_TestDupProd_Cloned_test2	INR	Show!	May-1-2014 2:22:08 PM	Mar-31-2014	Show!	Approved	Show!	Show!	po_324	Show!	Deal Closed

All invoices sent to the organization available in the purchase screen. Note the Payment details and defect details link. The client can track all payments related to a particular invoice from the same screen. Also, the client can view all defects related to a particular invoice from the same screen -

[Home](#)
[Purchase](#)
[Sales](#)
[My Products](#)
[Defects](#)
[Service Requests](#)
[Dashboard](#)
[Accounts](#)
[User Preferences](#)
[Administration](#)

All Requirement Details

All RFQ Details

All Invoices Sent to Us

All Invoices Sent to Us

Filter By

RFQ#:

Invoice No.:

Transaction No.:

Category: _

Delivery Status: _

Payment Status: _

Supplier: _

Invoice Date (From) :

Invoice Date (To) :

Filter

	RFQ#	Invoice#	Currency	Amount	Invoice Details	Invoice Date	Delivery Status	Payment Status	Payment Details	Defects
	ra_488	inv_242	INR	5800	Show!	Mar-27-2014	Undelivered	Incomplete	Show!	Show!

All purchase orders issued can be viewed from the same purchase screen -

HomePurchaseSalesMy ProductsDefectsService RequestsDashboardAccountsUser PreferencesAdministration

All Requirement DetailsAll RFQ DetailsAll Invoices Sent to UsAll Purchase Orders

All Purchase Orders

Filter By

RFQ#:

FO No:

Supplier:

FO Date (From) :

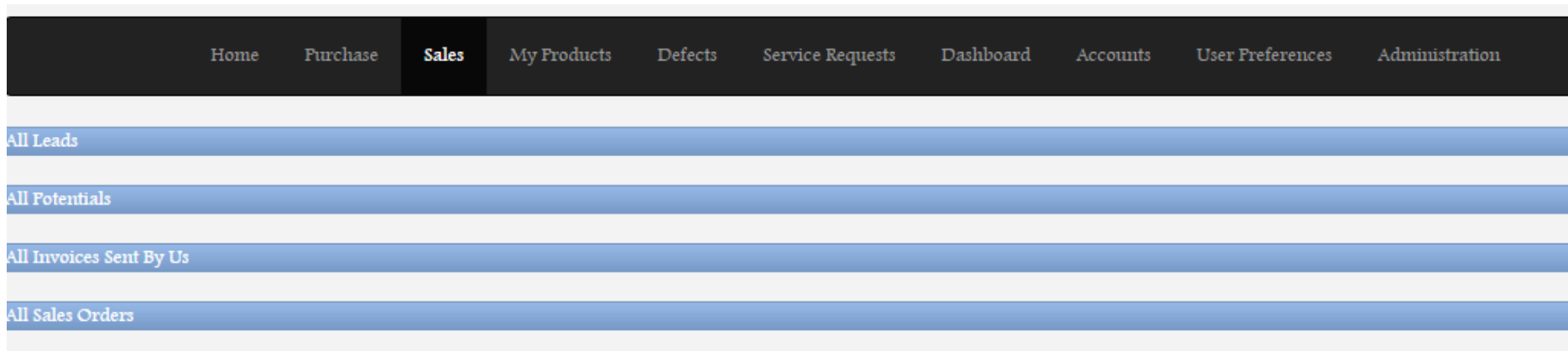
FO Date (To) :

Filter

		RFQ#	PO#	PO Date	Currency	Amount
	Edit	ra_533	po_324	Oct-19-2014 2:59:32 PM	INR	0

The sales screen -

Users can view and track lead, potentials, sales orders and invoices sent to clients all from this single screen.



Like in the purchase screen, all these sections in the sales screen are also expandable.

Important feature to note here. All subsections like RFQ, Invoices, Leads, Potentials have **smart buttons** associated -

e.g., Using the **Document** button, user can keep all documents related to a lead in a single place. Using the **Notes** button, user can keep notes associated with a lead. Using the **Logs** button user can view/track who is making what changes - this allows organization wide **audit-facility**.

All Leads

Filter By

Lead#: Category: Active Status: Customer:

From Date (Due) : To Date (Due) : Assigned To: Filter

⚠ Denotes Unanswered Leads (Total:6)

		Lead#	Lead Name	Customer Details	Currency	Specifications & Reply	Submit Date	Due Date	Followup Date	Assigned To	Location	T&C	Active Status	Creation Mode	<button>Clear Filter</button>
<input checked="" type="radio"/>	Edit	ra_455	Feb28_Lead_5_xyz7	xyz12org	USD	Show!	Feb-11-2014 12:30:25 PM	Feb-28-2014	Feb-20-2014	xyz7	Show!	Show!	Active	Manual	
<input type="radio"/>	Edit	ra_454	Feb28_Lead_4_xyz7	xyz12org	USD	Show!	Feb-11-2014 1:57:54 AM	Feb-28-2014	Feb-20-2014	xyz7	Show!	Show!	Active	Manual	
<input type="radio"/>	Edit	ra_453	Feb28_Lead_3_xyz7	xyz12org	USD	Show!	Feb-11-2014 1:51:26 AM	Feb-28-2014	Feb-20-2014	xyz7	Show!	Show!	Active	Manual	
<input type="radio"/>	Edit	ra_452	Feb28_Lead_2_xyz7	xyz12org	USD	Show!	Feb-11-2014 1:47:57 AM	Feb-28-2014	Feb-20-2014	xyz7	Show!	Show!	Active	Manual	
<input type="radio"/>	Edit	ra_451	Feb28_Lead_1_xyz7	xyz12org	USD	Show!	Feb-11-2014 1:40:24 AM	Feb-28-2014	Feb-20-2014	xyz7	Show!	Show!	Active	Manual	
123															

Refresh Data!

Create New Lead!

Clone This!

Convert to Potential!

Documents

Notes!

Logs!

Product catalogue -

Users from the organization can maintain the product catalogues here. Also, all sales order related to a particular product can be tracked from here

[Logout](#)

HomePurchaseSalesMy ProductsDefectsService RequestsDashboardAccountsUser PreferencesAdministration

All ProductsClear Filter

Filter By

Category: Child Category: Filter

		Product Name	Specifications	Inventory Stock	Measurement Unit	Currency	Unit Source Price	Unit List Price	Sales Orders
<input checked="" type="radio"/>	Edit	DELL XT Ext HD	Show!	200	Numbers		900	2500	Show!
<input type="radio"/>	Edit	Lenovo_series1	Show!	500	Numbers		28000	30000	Show!

Refresh Data!Create New Product!Notes!Logs!

By clicking on the **Sales Order** link for any particular product the user can view all the transactions related to that product. These details are pulled from all transactions/invoices generated for the particular product. All **screens are always in-sync**.

HomePurchaseSalesMy ProductsDefects

All Products

		Product Name	Specifications	Inventory
<input checked="" type="radio"/>	Edit	DELL XT Ext HD	Show!	200
<input type="radio"/>	Edit	Lenovo_series1	Show!	500

192.168.0.3:3001/Pages/Popups/Product/AirFoc_30.aspx?productName=DELL%20XT%20EXT%20HD

Total units of this product ordered. 251

Total units delivered as per invoice records (only considering invoices where 'Delivery Status' is set to 'Delivered'. 125

SO_No	RFQ_No	No of Units Delivered	Quote	Units Ordered
po_184	ra_399	0	900	6
po_207	ra_459	0	250	20
po_209	ra_464	80	25001	40
po_230	ra_456	0	70	40
po_241	ra_477	45	2500	40
po_260	ra_483	0	2500	10
po_266	ra_488	0	2500	2
po_269	ra_489	0	2500	3

Defect Home Page -

HomePurchaseSalesMy ProductsDefectsService RequestsDashboardAccountsUser PreferencesAdministration

Defects Sent To Us

Defects Sent By Us

Clear Filter

There are two sections in the defect home page - a. Defects sent to this organization, b. Defects Sent from this organization.

As shown in this screen shot, **all communication** between the parties related to a defect can be maintained from the defect home page.

[Home](#) [Purchase](#) [Sales](#) [My Products](#) **Defects** [Service Requests](#) [Dashboard](#) [Accounts](#) [User Preferences](#) [Administration](#)

Defects Sent To Us

Defects Sent To Us

Filter By

Defect No.

RFQ No.

Invoice No.

Clear Filter

Defect Severity:

Defect Status:

Defect Resolution Stat:

From Date (Defect Raised) :

To Date (Defect Raised) :

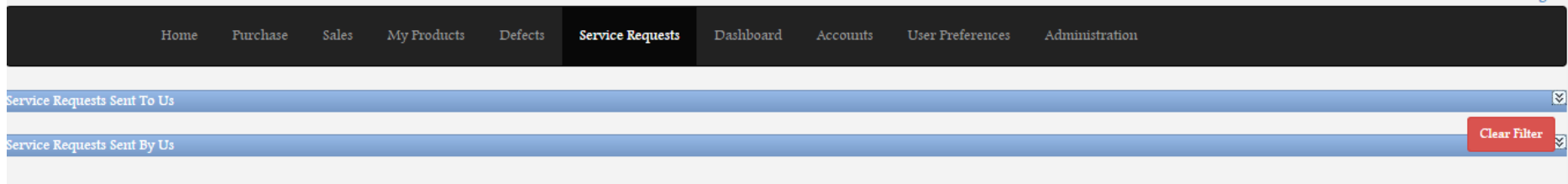
Assigned To:

Filter

		Defect#	RFQ#	Invoice#	Description	Submit Date	Close Date	Customer Details	Defect Status	Status Reason	Assigned To	Severity	Defect Resolution Status	All Communications	Amount	Currency
<input type="radio"/>	Edit	df_200	ra_476	inv_197	testing	Mar-15-2014 10:44:51 PM		xyz12org	Accept	testing		High	Open	Show!	1100022	USD
<input type="radio"/>	Edit	df_163	ra_286	inv_149	outgoing 111 resolve	Sep-26-	Oct-9-	xyz12org	Accept	Just		High	Resolved	Show!	1596000	

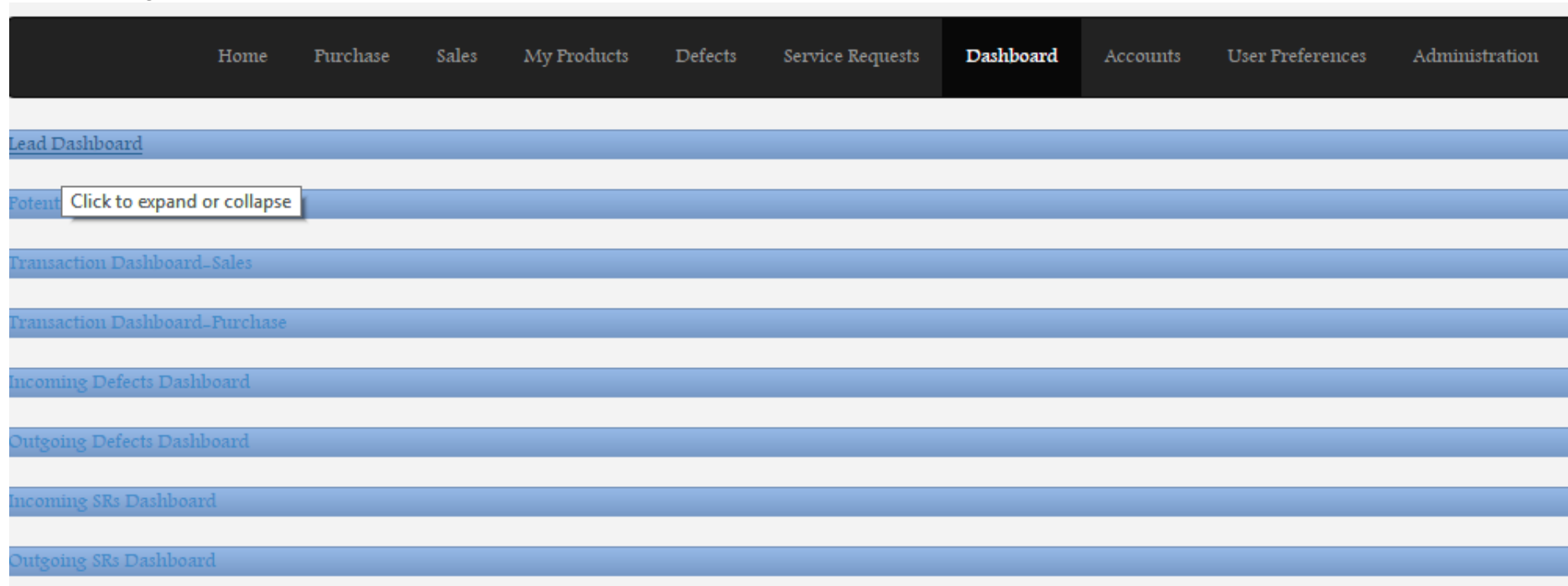
Service Request Home Page -

Like defect, there is a service request home page -

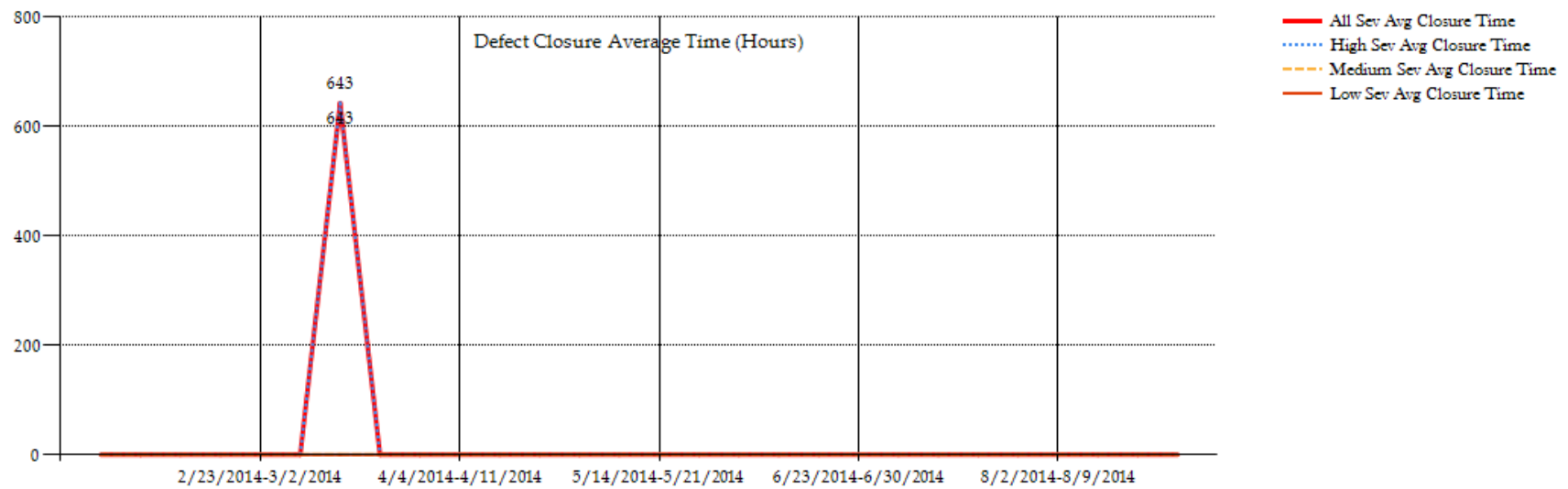


Dashboard Page -

There is a large number of pre-built dashboards already available for the users.



The dashboards have in-built report generation module which allows user to download the report -



Filter by Defect Submit Date.Frequency and Service Agent (Default date range is 6 months):

From Date: 2014-01-01 To Date: 2015-05-28 Frequency: weekly Select Service Agent: All Show! Report!

Accounts Page -

The accounts page is where all accounts (client/vendor) details are maintained. There are quick links available which allows user to view all transactions with a particular account, all defects related to a particular account from the same page.

HomePurchaseSalesMy ProductsDefectsService RequestsDashboardAccountsUser PreferencesAdministration

All Accounts

Filter By

Name :

Short Name:

Main Product/Services:

Filter

Clear Filter

		Account Name	Account Short Name	Ph No#	Email	From Site?	Location	Main Prod/Services	All Deals With this Account	All Defects
<input type="radio"/>	Edit		xyzowner10_test	9956734228		N	Show!	Show!	Show!	Show!

Admin Page -

This page is mainly restricted to administrators of each organization. Here the admin can control access to different sections of the portal, maintain and create workflows, define document formats (e.g. default format of the invoice for his/her organization) etc -

