

OMS ERM System

Project Link: - <http://demoo-manekserver.tk/north-trend-crm/public/login>

1. News & Announcement Module: -

- Admin can create, edit, update, and delete the news and announcement.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.

Video Link: - <https://www.screencast.com/t/5opHpDfRg3>

- **Steps: - How to create a new news and announcement.**
 - Step 1: - Click on create button.

The screenshot shows the OMS ERM System interface. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management, etc. The main area is titled 'News & Announcement'. At the top right, there's a 'Create' button with a red box and arrow pointing to it. Below the header are search and filter fields: 'Search here...', 'Select Customer', 'Select priority', and 'Select type'. Underneath is a table with columns: No, Business Unit, Title, Type, Module, Priority, User Name, Status, and Action. Two records are listed: one for APBW (Priority: Important) and one for NTMC (Priority: Normal). At the bottom, it says 'Showing 1 to 2 of 2 records'.

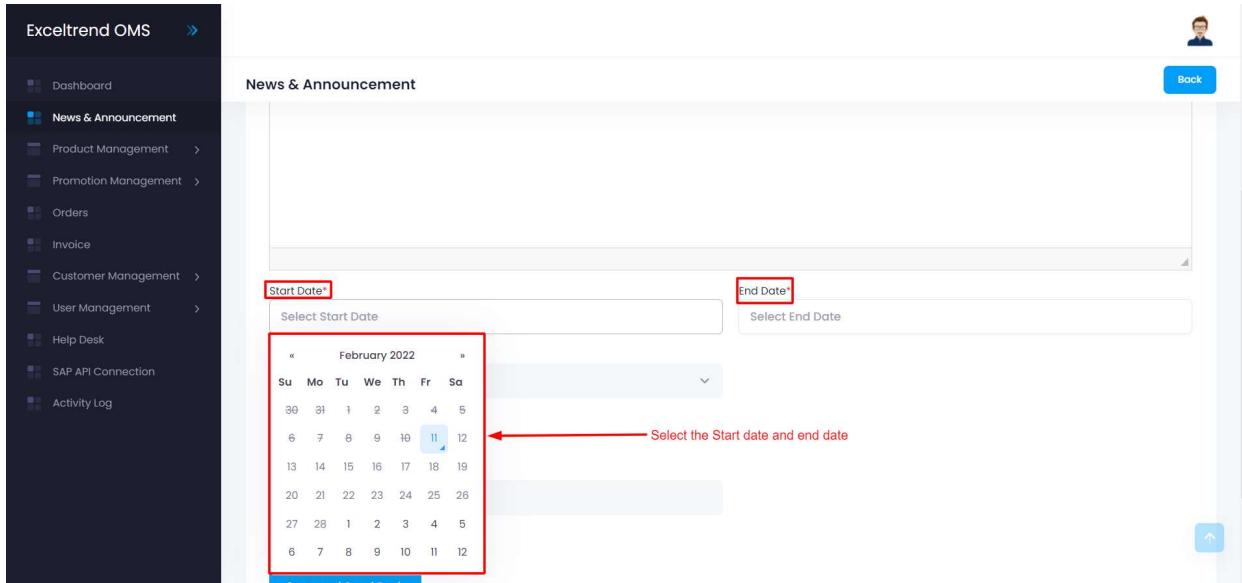
- Step 2: - Select the business unit, select priority, enter the title, and select the type.

The screenshot shows the 'News & Announcement' module in the OMS ERM System. On the left is a dark sidebar with various management options. The main area is titled 'News & Announcement' and contains a form titled 'Add Details'. The top part of the form has four fields: 'Select Business Unit*', 'Select Priority*', 'Title*', and 'Select Type*'. Each of these fields has a dropdown menu. Below this is a rich text editor labeled 'Message*' with a toolbar. A red box highlights the first four input fields.

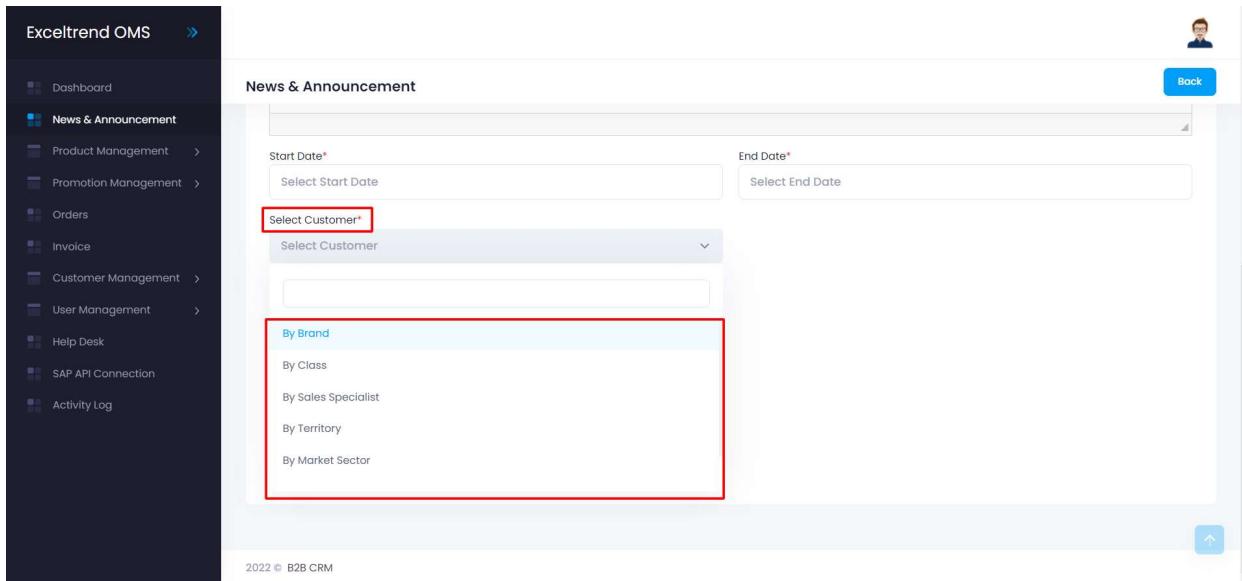
▪ Step 3: - Enter the Message.

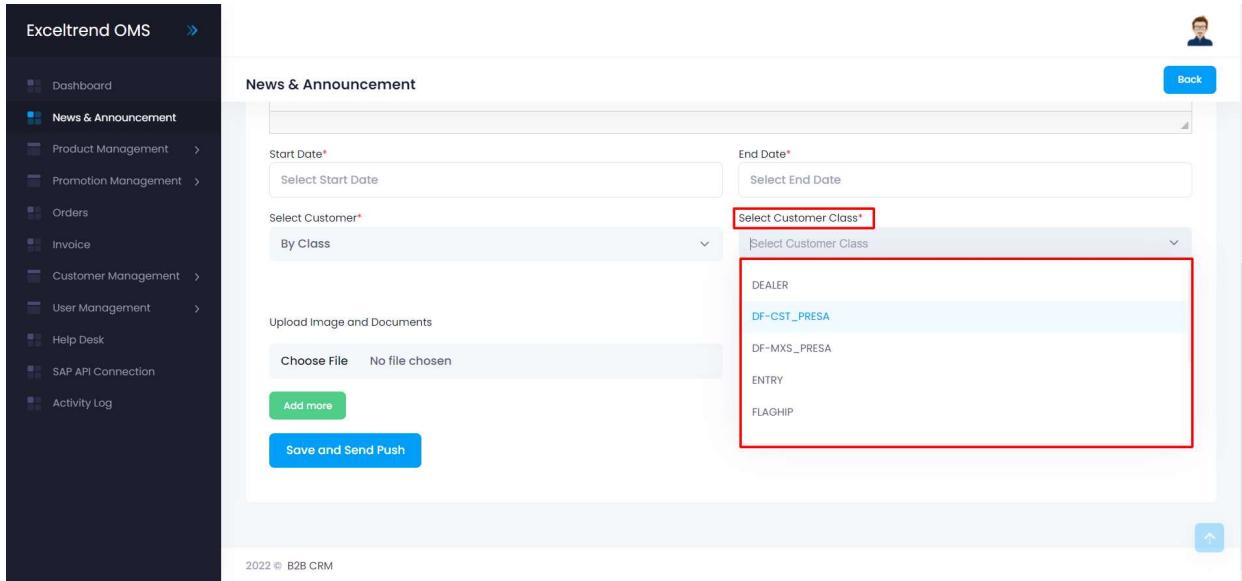
This screenshot shows the same 'News & Announcement' module. The 'Title*' field now contains the placeholder 'Enter Title'. A red box highlights the message editor area, and a red arrow points to it with the text 'Enter the Message'.

▪ Step 4: - Select the Start date and end date.



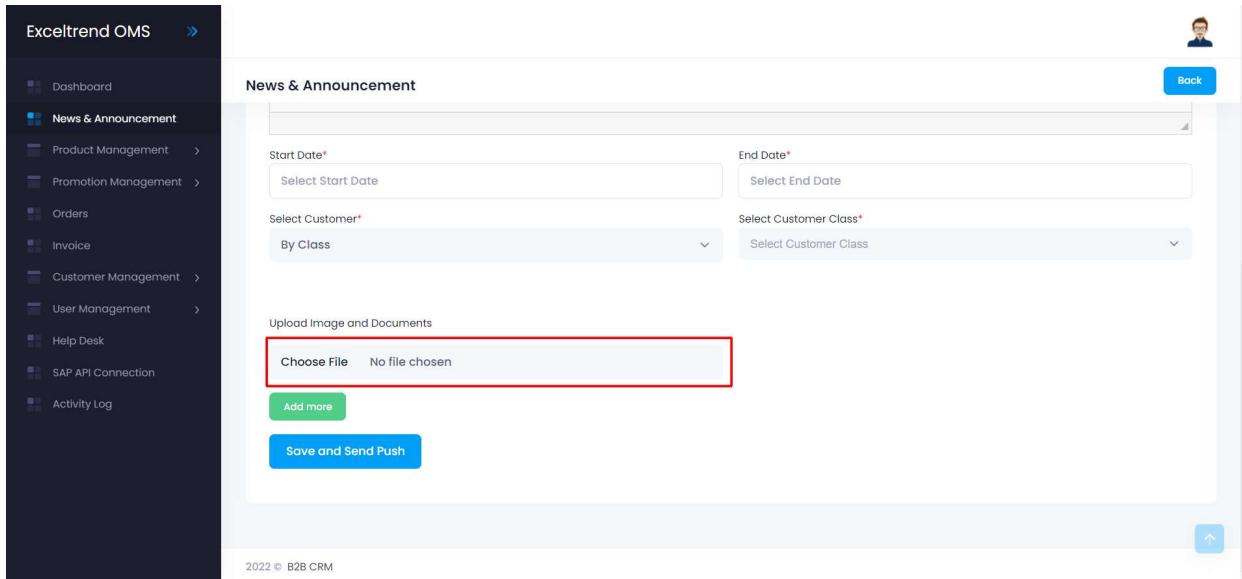
- Step 5: - Select the customer and that according show second dropdown and select the data.



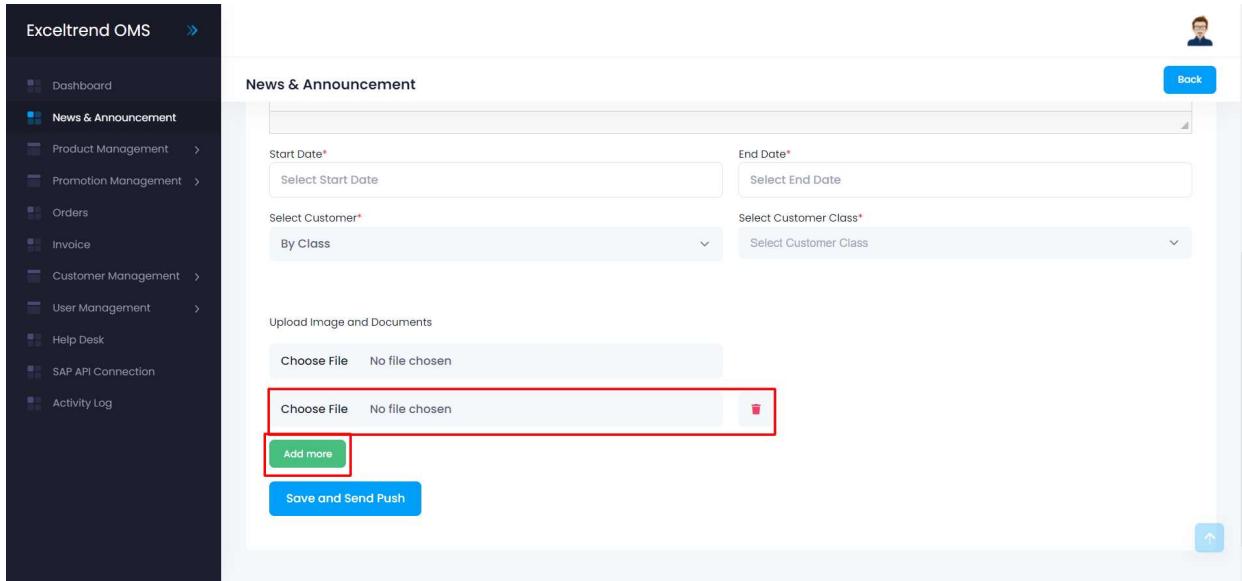


The screenshot shows the 'News & Announcement' section of the OMS ERM System. On the left is a dark sidebar with various menu items. The main area has fields for 'Start Date*' and 'End Date*', both with placeholder text 'Select Start Date' and 'Select End Date'. Below these are dropdown menus for 'Select Customer*' and 'Select Customer Class*'. The 'Select Customer Class*' dropdown is expanded, showing a list of categories: DEALER, DF-CST_PRESA, DF-MXS_PRESA, ENTRY, and FLAGHIP. A red box highlights this dropdown. There's also a section for 'Upload Image and Documents' with a 'Choose File' button showing 'No file chosen'. Buttons for 'Add more' and 'Save and Send Push' are at the bottom.

- Step 6: - Upload the image and document and click on add more button you can add multiple image and document upload.

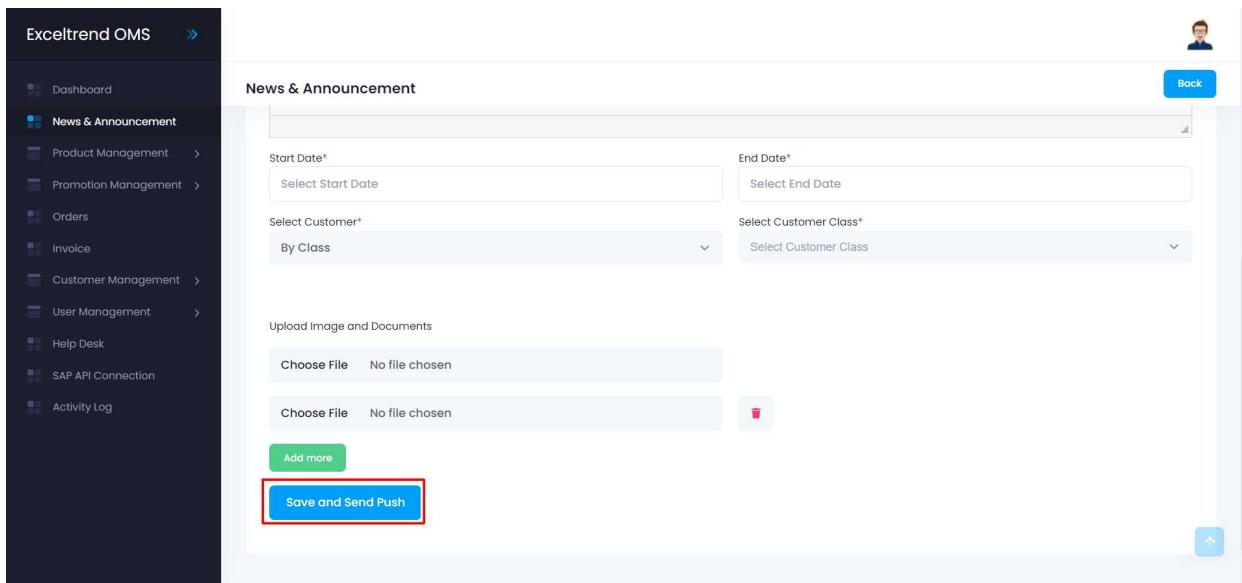


This screenshot is similar to the one above, showing the 'News & Announcement' page. The 'Choose File' input field, which was previously empty, is now highlighted with a red box. The rest of the interface, including the sidebar, date fields, customer selection, and document upload section, appears identical to the first screenshot.



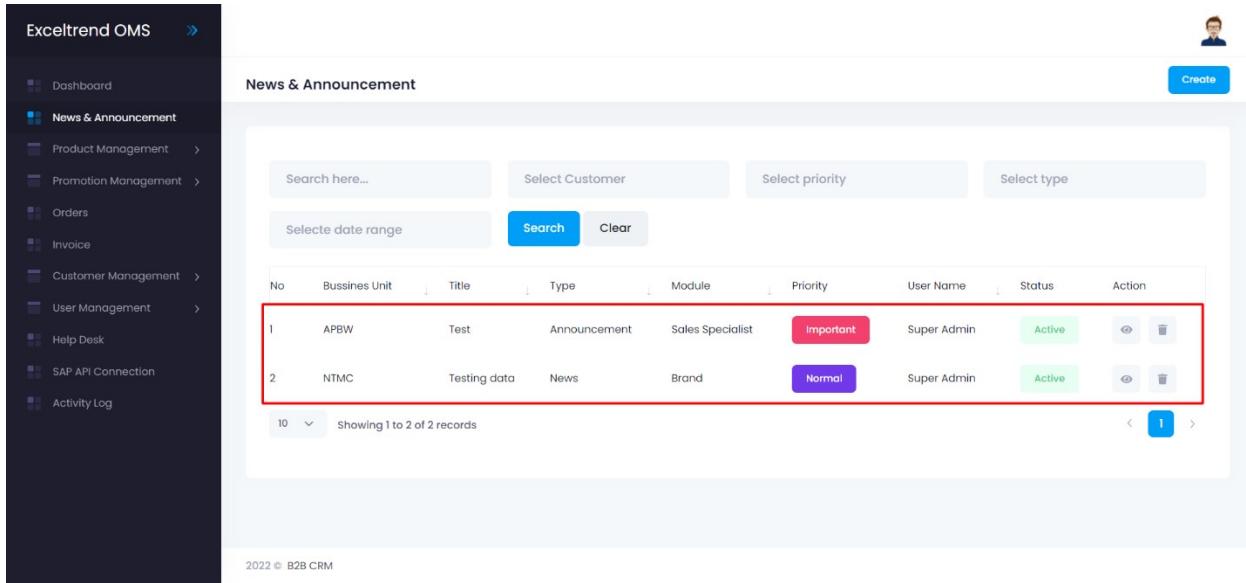
The screenshot shows the 'News & Announcement' creation page. On the left is a dark sidebar with various menu items. The main area has fields for 'Start Date*' and 'End Date*', both with dropdown menus. Below that are dropdowns for 'Select Customer*' and 'Select Customer Class*'. Under 'Upload Image and Documents', there are two file input fields, both showing 'No file chosen'. A green 'Add more' button is between them. At the bottom is a blue 'Save and Send Push' button.

- Step 7: - Click on Save and Send Push button



This screenshot is identical to the one above, showing the 'News & Announcement' creation page. The 'Save and Send Push' button at the bottom is highlighted with a red box, indicating it has been selected.

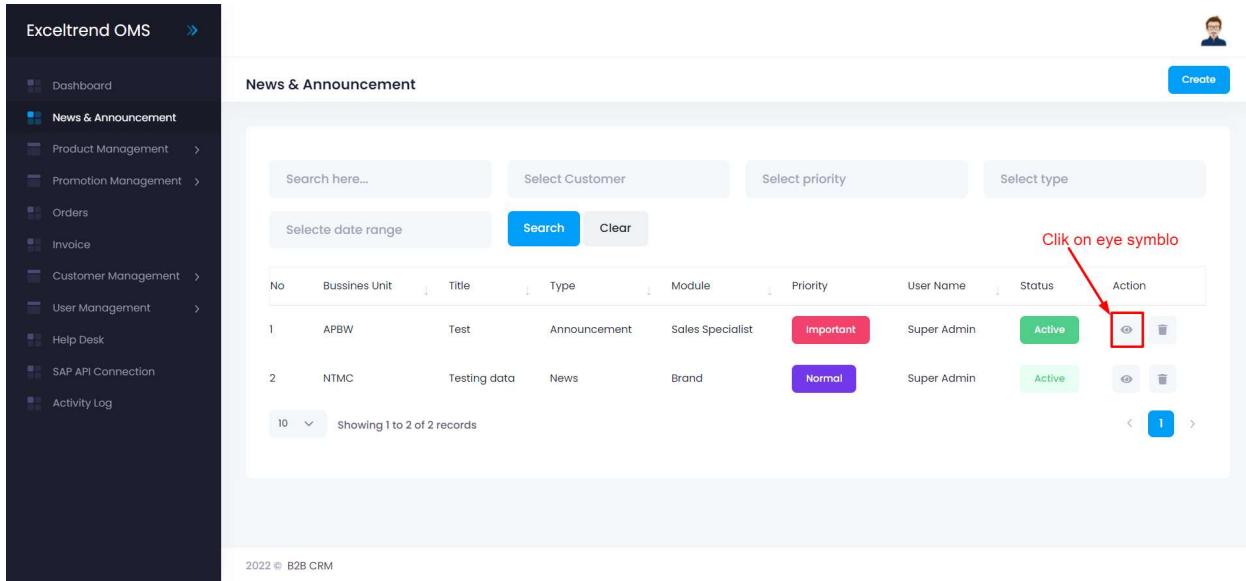
- Step 8: - Created News & Announcement show in listing page.



The screenshot shows the 'News & Announcement' section of the Exceltrend OMS system. The left sidebar includes links for Dashboard, News & Announcement (selected), Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Help Desk, SAP API Connection, and Activity Log. The main area displays a table with two rows of news items. The columns are: No, Business Unit, Title, Type, Module, Priority, User Name, Status, and Action. Row 1: APBW, Test, Announcement, Sales Specialist, Important, Super Admin, Active, with eye and trash icons. Row 2: NTMC, Testing data, News, Brand, Normal, Super Admin, Active, with eye and trash icons. A red box highlights the entire table row for the second record.

No	Business Unit	Title	Type	Module	Priority	User Name	Status	Action
1	APBW	Test	Announcement	Sales Specialist	Important	Super Admin	Active	
2	NTMC	Testing data	News	Brand	Normal	Super Admin	Active	

- Steps: - How to view the news and announcement.
 - Steps 1: - Click on eye icon button.



This screenshot is identical to the one above, showing the 'News & Announcement' page. However, a red box highlights the eye icon in the 'Action' column of the first table row (APBW). A red arrow points from the text 'Click on eye symbol' to this specific icon.

- Steps 2: - News and announcement all details show and news and announcement details page.

Notification Details

Title	Test
Priority	Important
Notification Type	Announcement

Message

What is Lorem Ipsum?
Lorem ipsum is simply a dummy text of the printing and typesetting industry. Lorem ipsum has been the industry's standard dummy text ever since the 1500s when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem ipsum.

Module:	Sales Specialist
Start Date:	Feb 10, 2022
End Date:	Mar 31, 2022
Is Active:	Active

Users

No.	Sales Specialist Name	Role	Is Seen
1	ALBERT CARINGAL	Sales Specialist	No

Showing 1 to 1 of 1 records

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- **Steps: - How active and inactive the news and announcement.**
 - Steps 1: - Click on Active status and appear to one pop-up model.

The screenshot shows the 'News & Announcement' section of the Exceltrend OMS. The table has columns: No, Business Unit, Title, Type, Module, Priority, User Name, Status, and Action. The second row has a 'Status' column value of 'Active' highlighted with a green box and a red arrow pointing to it from the top right. Other rows show 'Important' and 'Normal' priority levels.

No	Business Unit	Title	Type	Module	Priority	User Name	Status	Action
1	APBW	Test	Announcement	Sales Specialist	Important	Super Admin	Active	
2	NTMC	Testing data	News	Brand	Normal	Super Admin	Active	

- Steps 2: - Pop-up model appear and show message “Are you sure want to change status?” and you click on “Yes, change it” button the news and announcement status change.

The screenshot shows a modal dialog box with the question "Are you sure want to change status?" and two buttons: "Yes, change it" (highlighted with a blue box and a red arrow) and "Cancel". The background shows the same 'News & Announcement' table as the previous screenshot, with the second row's status still showing 'Active'.

- Steps 3: - Update status show in listing page.

The screenshot shows the 'News & Announcement' section of the Exceltrend OMS. There are two records listed:

No	Bussines Unit	Title	Type	Module	Priority	User Name	Status	Action
1	APBW	Test	Announcement	Sales Specialist	Important	Super Admin	Inactive	
2	NTMC	Testing data	News	Brand	Normal	Super Admin	Active	

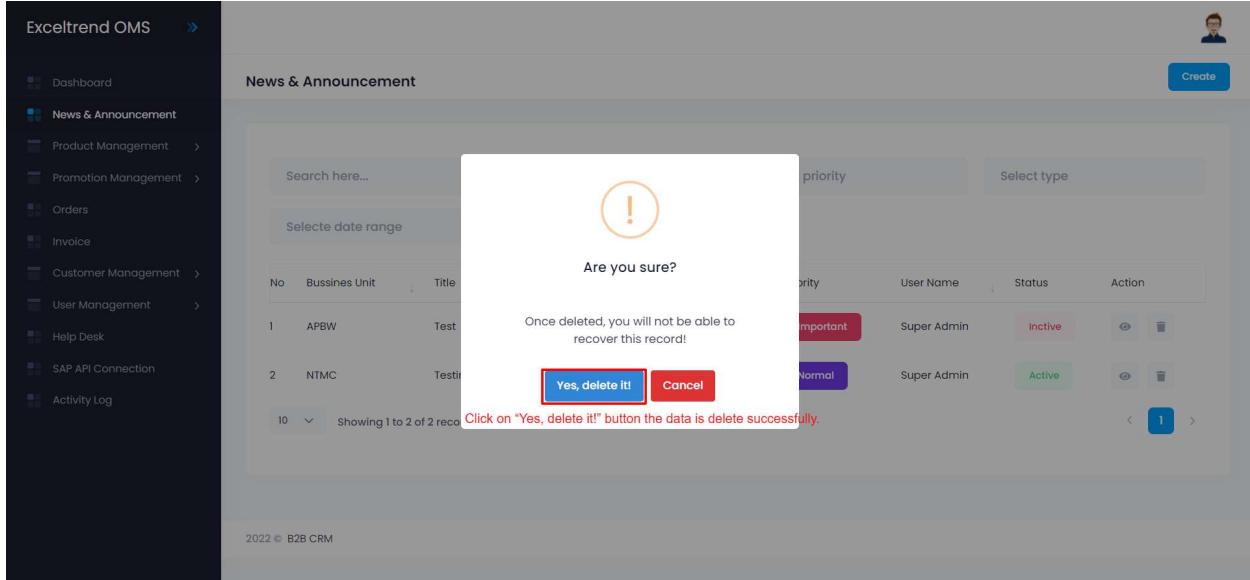
At the bottom left, it says "Showing 1 to 2 of 2 records".

- **Steps: - How to delete the news and announcement.**

- Steps 1: - Click on trash icon and appear pop-up model.

The screenshot shows the same 'News & Announcement' section. A red arrow points to the trash icon of the second record (NTMC). A callout bubble with the text "Click on trash symbol" is positioned above the trash icon.

- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.



2. Product Management Module: -

- There are three sub modules in this module
 - Product
 - Product Tagging
 - Brand
- Admin can sync the data product and product brand over here.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
Admin can export the product data.

Video Link: - <https://www.screencast.com/t/s7xwra9F9q>

- **Steps: - How to sync the product.**
 - Steps 1: - Click on sync product button and appear to pop-up model.

The screenshot shows the 'Product Management - Products' section of the Exceltrend OMS. At the top right, there is a blue button labeled 'Sync Products'. A red arrow points to this button with the instruction 'Click on button the sync product'.

No.	Business Unit	Name	Brand	Code	Product Line	Product Category	Date	Status
1	NTMC	CASTROL TLX XTRA 204 209L DRUM	CASTROL	CL3423846	-	INDUSTRIAL	Nov 24, 2021	<input checked="" type="checkbox"/>
2	NTMC	Castrol VECTON UMBRELLA BLACK	MKTG. MATERIALS	CLMM0018	-	INDUSTRIAL	Nov 23, 2021	<input checked="" type="checkbox"/>
3	NTMC	CASTROL DESKTOP CALENDAR	MKTG. MATERIALS	CLMM0017	-	INDUSTRIAL	Nov 23, 2021	<input checked="" type="checkbox"/>
4	NTMC	CASTROL VECTON PLANNER 2022 BLACK	MKTG. MATERIALS	CLMM0016	-	INDUSTRIAL	Nov 23, 2021	<input checked="" type="checkbox"/>
5	APBW	CST 175/65 R14 MR-C5 82H TL	CST	CS14022	-	PCR	Nov 23, 2021	<input checked="" type="checkbox"/>

- Steps 2: - Pop-up model appear and show message “Are you sure you want to sync Products?” and click on “Yes, do it” button that time loader should be load after the message displayed sync product successfully.

The screenshot shows the same 'Product Management - Products' page as above, but with a modal dialog box overlaid. The dialog box contains a large orange exclamation mark icon and the text 'Are you sure you want to Sync Products?'. Below this, it says 'Syncing process will run in background and it may take some time to sync all products Data.' At the bottom of the dialog are two buttons: a blue 'Yes, do it!' button and a red 'Cancel' button. A red box highlights the 'Yes, do it!' button with the instruction 'Click on "Yes, do it!" Button'.

No.	Business Unit	Name	Brand	Code	Product Line	Product Category	Date	Status
1	NTMC	CASTROL TLX XTRA 204 209L DRUM	CASTROL	CL3423846	-	INDUSTRIAL	Nov 24, 2021	<input checked="" type="checkbox"/>
2	NTMC	Castrol VECTON UMBRELLA BLACK	MKTG. MATERIALS	CLMM0018	-	INDUSTRIAL	Nov 23, 2021	<input checked="" type="checkbox"/>
3	NTMC	CASTROL DESKTOP CALENDAR	MKTG. MATERIALS	CLMM0017	-	INDUSTRIAL	Nov 23, 2021	<input checked="" type="checkbox"/>
4	NTMC	CASTROL VECTON PLANNER 2022 BLACK	MKTG. MATERIALS	CLMM0016	-	INDUSTRIAL	Nov 23, 2021	<input checked="" type="checkbox"/>
5	APBW	CST 175/65 R14 MR-C5 82H TL	CST	CS14022	-	PCR	Nov 23, 2021	<input checked="" type="checkbox"/>

- Steps: - How to edit the product.
 - Steps 1: - Click on plus (+) icon

The screenshot shows the 'Product' management interface. On the left, a sidebar lists various modules like Dashboard, News & Announcement, Product Management (selected), Promotions, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main area is titled 'Product' and contains a table with columns: No., Business Unit, Name, Brand, Code, Product Line, Product Category, Date, and Status. Row 1 has a red box around its edit icon (pencil). Buttons at the top include 'Search', 'Clear', 'Export Excel', and 'Sync Products'.

No.	Business Unit	Name	Brand	Code	Product Line	Product Category	Date	Status
1	NTMC	CASTROL TLX XTRA 204 209L DRUM	CASTROL	CL3423846	-	INDUSTRIAL	Nov 24, 2021	<input checked="" type="radio"/>
2	NTMC	Castrol VECTON UMBRELLA BLACK	MKTG. MATERIALS	CLMM0018	-	INDUSTRIAL	Nov 23, 2021	<input checked="" type="radio"/>
3	NTMC	CASTROL DESKTOP CALENDAR	MKTG. MATERIALS	CLMM0017	-	INDUSTRIAL	Nov 23, 2021	<input checked="" type="radio"/>
4	NTMC	CASTROL VECTON PLANNER 2022 BLACK	MKTG. MATERIALS	CLMM0016	-	INDUSTRIAL	Nov 23, 2021	<input checked="" type="radio"/>
5	APBW	CST I75/65 R14 MR-C5 82H TL	CST	CS14022	-	PCR	Nov 23, 2021	<input checked="" type="radio"/>
6	APBW	CST I75/65 R14 MR-C5 82H TL	CST	CS14021	-	PCR	Nov 23, 2021	<input checked="" type="radio"/>

- Steps 2: - Click on Pencil icon

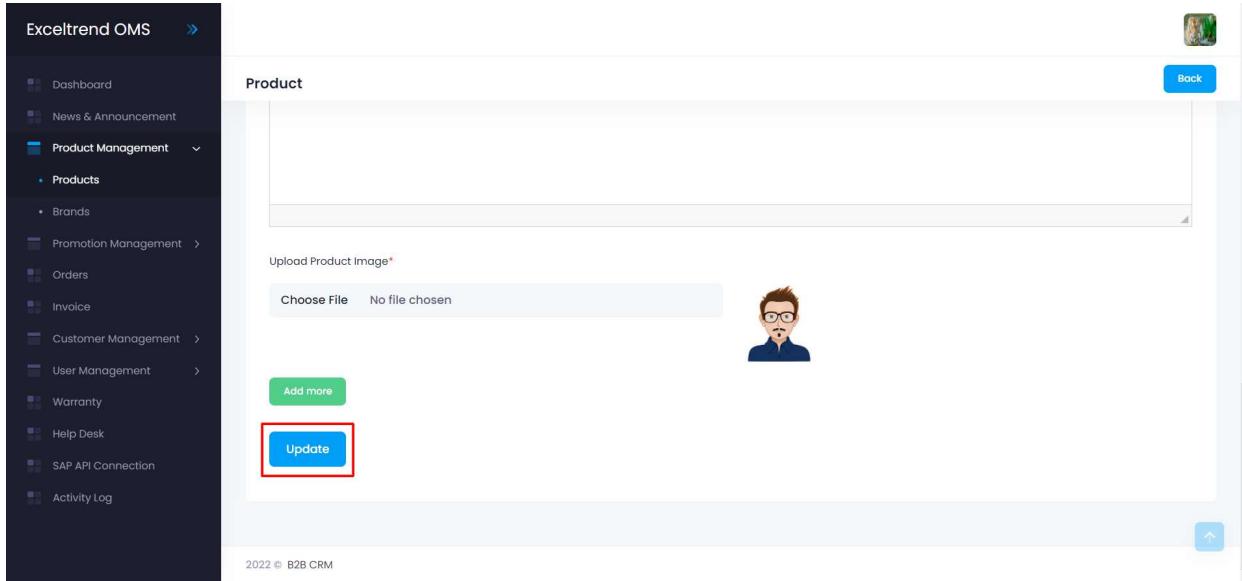
This screenshot shows the same product list as the previous one, but with a different focus. A red box highlights the 'Action' column header, and a red arrow points to the edit icon (pencil) in the first row's 'Action' column. The rest of the interface is identical to the first screenshot.

No.	Business Unit	Name	Brand	Code	Product Line	Product Category	Date	Status
1	NTMC	CASTROL TLX XTRA 204 209L DRUM	CASTROL	CL3423846	-	INDUSTRIAL	Nov 24, 2021	<input checked="" type="radio"/>
2	NTMC	Castrol VECTON UMBRELLA BLACK	MKTG. MATERIALS	CLMM0018	-	INDUSTRIAL	Nov 23, 2021	<input checked="" type="radio"/>
3	NTMC	CASTROL DESKTOP CALENDAR	MKTG. MATERIALS	CLMM0017	-	INDUSTRIAL	Nov 23, 2021	<input checked="" type="radio"/>
4	NTMC	CASTROL VECTON PLANNER 2022 BLACK	MKTG. MATERIALS	CLMM0016	-	INDUSTRIAL	Nov 23, 2021	<input checked="" type="radio"/>
5	APBW	CST I75/65 R14 MR-C5 82H TL	CST	CS14022	-	PCR	Nov 23, 2021	<input checked="" type="radio"/>

- Steps 3: - Enter the technical specification, features, Advantages and Benefits, sell sheets and upload more product image.

The screenshot shows the Exceltrend OMS Product Management interface. The left sidebar contains navigation links for Dashboard, News & Announcement, Product Management (Products, Brands), Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main content area is titled 'Product' and shows the 'Update Details' page for a product named 'CASTROL TLX XTRA 204 209L DRUM'. The page features several rich-text editor boxes labeled 'Technical specifications', 'Features', 'Advantages & Benefits', and 'Sell Sheets', each with its own toolbar. A section for 'Upload Product Image' includes a file input field ('Choose File') showing 'No file chosen', a 'Add more' button, and an 'Update' button. A small profile picture of a person with glasses is displayed. The bottom of the page includes a footer with the text '2022 © B2B CRM'.

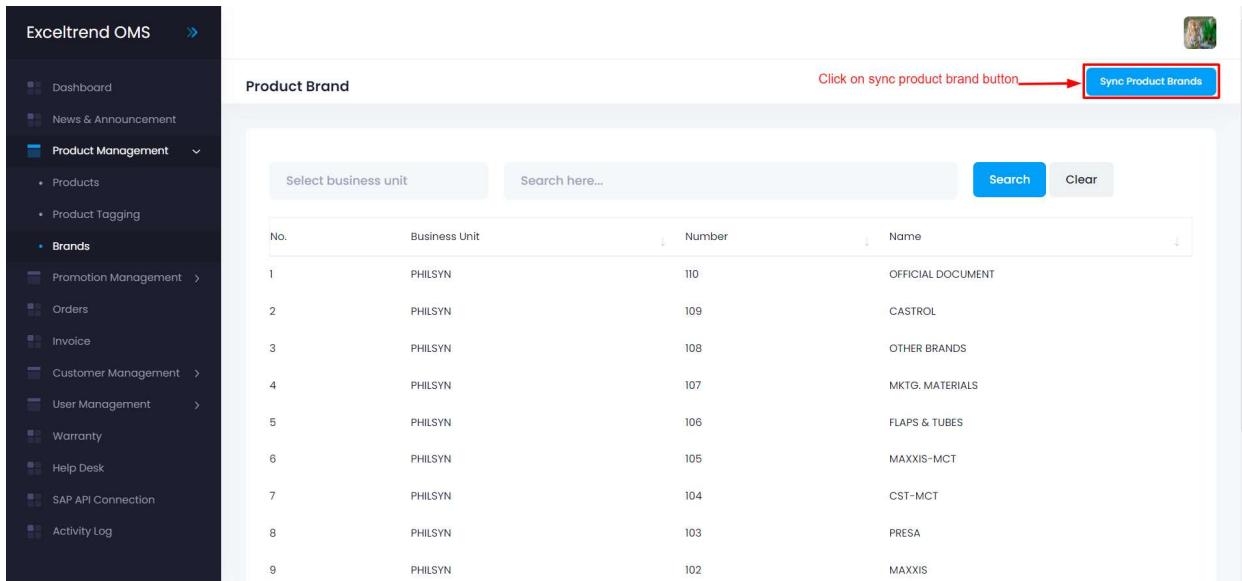
- Steps 4: -Click on Upload button.



The screenshot shows the Exceltrend OMS interface. On the left, a dark sidebar menu includes 'Dashboard', 'News & Announcement', 'Product Management' (selected), 'Products' (selected), 'Brands', 'Promotion Management', 'Orders', 'Invoice', 'Customer Management', 'User Management', 'Warranty', 'Help Desk', 'SAP API Connection', and 'Activity Log'. The main content area is titled 'Product' and shows a placeholder image of a person's head. Below it is a file upload section with a 'Choose File' button showing 'No file chosen'. A small placeholder image of a person's head is displayed. At the bottom are 'Add more' and 'Update' buttons, with 'Update' being highlighted by a red box.

- Steps: - How to sync the product Brands.

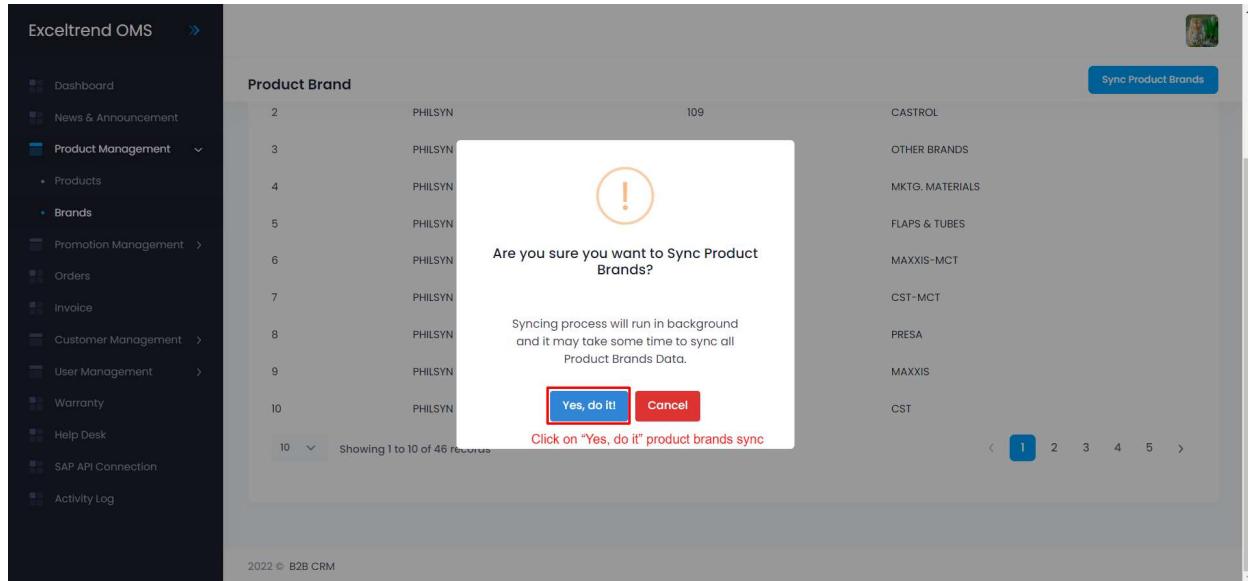
- Steps 1: - Click on sync product brand button and appear to pop-up model.



The screenshot shows the Exceltrend OMS interface. The sidebar menu is identical to the previous screenshot. The main content area is titled 'Product Brand' and contains a table with columns: No., Business Unit, Number, and Name. The table lists nine entries for PHILSYN. At the top right of the table is a 'Sync Product Brands' button, which is highlighted with a red box and an annotation 'Click on sync product brand button'.

No.	Business Unit	Number	Name
1	PHILSYN	110	OFFICIAL DOCUMENT
2	PHILSYN	109	CASTROL
3	PHILSYN	108	OTHER BRANDS
4	PHILSYN	107	MKTG. MATERIALS
5	PHILSYN	106	FLAPS & TUBES
6	PHILSYN	105	MAXXIS-MCT
7	PHILSYN	104	CST-MCT
8	PHILSYN	103	PRESA
9	PHILSYN	102	MAXXIS

- Steps 2: - Pop-up model appear and show message “Are you sure you want to sync Products Brands?” and click on “Yes, do it” button that time loader should be load after the message displayed sync product brands successfully.



3. Promotion Management Module: -

- There are three sub modules in this module and all modules explain in details one by one
 - Promotion
 - Promotion Types
 - Claimed Promotions

3.1. Promotion Module

- Admin can create, edit, update, delete, active and inactive the promotion.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.

Video Link: - <https://www.screencast.com/t/6ezY1IQfli>

- **Steps: - How to create a new promotion.**
 - Steps 1: - Click on create button.

The screenshot shows the 'Promotions' section of the Exceltrend OMS. On the left is a dark sidebar with various menu items. The 'Promotions' item under 'Promotion Management' is selected. The main area is titled 'Promotions' and contains a table of existing promotions. A red box and arrow highlight the 'Create' button in the top right corner of the table header.

No.	Business Unit	Title	Promotion Customers	Start Date	End Date	Status	Action
1	APBW	Valentine Day	Customer	Feb 28, 2022	Mar 28, 2022	<input checked="" type="checkbox"/>	
2	NTMC	Chine New Year	Class	Feb 06, 2022	Feb 28, 2022	<input checked="" type="checkbox"/>	

Showing 1 to 2 of 2 records

- Steps 2: - Enter the data in title, description, select business unit, select promotion type, select customer group, select promotion start date and end date, and upload promotion image.

The screenshot shows the 'Add Details' form for a new promotion. The left sidebar is identical to the previous screenshot. The main form has a title 'Add Details'. It includes fields for 'Title*' (with placeholder 'Enter Promotion Title'), 'Description' (with a large text area), 'Business Unit*' (with dropdown 'Select Business Unit'), 'Promotion Type*' (with dropdown 'Select Promotion Type'), 'Select Customer Group*' (with dropdown 'Select Customers'), 'Promotion Start Date*' (with dropdown 'Select Promotion Start Date'), 'Promotion end Date*' (with dropdown 'Select Promotion End Date'), and 'Promotion Image*' (with file input 'Choose File' showing 'No file chosen'). A 'Save' button is at the bottom.

- Steps 3: - Click on Save button.

Promotion

Business Unit* Select Business Unit

Promotion Type* Select Promotion Type

Select Customer Group* Select Customers

Promotion Start Date* Select Promotion Start Date

Promotion end Date* Select Promotion End Date

Promotion Image* Choose File No file chosen

Save Click on Save button.

- Steps 4: - Created promotion show in listing page.

- Steps: - How to edit the promotion.

- Steps 1: - Click on pencil icon.

Promotions

No.	Business Unit	Title	Promotion Customers	Start Date	End Date	Status	Action
1	APBW	Valentine Day	Customer	Feb 28, 2022	Mar 28, 2022	<input checked="" type="checkbox"/>	
2	NTMC	Chine New Year	Class	Feb 06, 2022	Feb 28, 2022	<input checked="" type="checkbox"/>	

Click on pencil icon

- Steps 2: - Update the data displayed filed.

Promotion

Update Details

Title*
Valentine Day

Description
Valentine Day

Business Unit*
APBW

Promotion Type*
Valentine Day

Select Customer Group*
By Customer

Select Customer
086 TRADING, 168 MARKETING, 199 OFF ROAD HOUSE, INC.,
107 CONSTRUCTION, 29:II TRADING, 2C AUTO PARTS,
2JESS CORPORATION, 3 J'S DRY GOODS SURPLUS,
315 AUTO PARTS SALES, 3J BARUGO ENTERPRISES

Promotion Start Date*
02/28/2022

Promotion end Date*
03/28/2022

Promotion Image*
Choose File No file chosen



Update

■ Steps 3: - Click on update button.

Promotion

Promotion Start Date*
02/28/2022

Promotion end Date*
03/28/2022

Promotion Image*
Choose File No file chosen



Update Click on update button.

- Steps: - How to view the promotion.
 - Steps 1: - Click on eye icon.

The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar menu with various modules like Dashboard, News & Announcement, Product Management, Promotion Management (selected), Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main area is titled 'Promotions' and contains a search bar with filters for business unit, promotion type, status, and customers, along with date range and search buttons. A table lists three promotion records: 1. NTMC, Holi Dhamaka, Class, Mar 01, 2022, Apr 01, 2022, Status: On, Action: Edit, Delete, View (with a red box and arrow pointing to it). 2. PHILCREST, Moon Dhamaka, Sales Specialist, Feb 17, 2022, Feb 28, 2022, Status: On, Action: Edit, Delete, View. 3. APBW, Test, Territory, Feb 16, 2022, Mar 12, 2022, Status: On, Action: Edit, Delete, View. At the bottom, it says 'Showing 1 to 3 of 3 records'. A red callout box with the text 'Click on eye symbol.' points to the eye icon in the action column of the first row.

No.	Business Unit	Title	Promotion Customers	Start Date	End Date	Status	Action
1	NTMC	Holi Dhamaka	Class	Mar 01, 2022	Apr 01, 2022	<input checked="" type="checkbox"/>	
2	PHILCREST	Moon Dhamaka	Sales Specialist	Feb 17, 2022	Feb 28, 2022	<input checked="" type="checkbox"/>	
3	APBW	Test	Territory	Feb 16, 2022	Mar 12, 2022	<input checked="" type="checkbox"/>	

- Steps 2: - Promotion all details are displayed in view page.

Excitrend OMS

The screenshot displays the Excitrend OMS system interface. On the left, a dark sidebar menu lists various modules: Dashboard, News & Announcement, Product Management, Promotion Management (selected), Promotion Types, Claimed Promotions, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log.

The main content area shows the "Promotion" module. A promotion titled "Holi Dhamaka" is displayed. The promotion details include:

- Title:** Holi Dhamaka
- Description:** Holi Dhamaka
- Business Unit:** NTMC
- Promotion Type:** Holi Dhamaka
- Promotion Customers:** Class
- Promotion Start Date:** Mar 01, 2022
- Promotion end Date:** Apr 01, 2022
- Promotion Image:** A small thumbnail image of a product.

Below this, the "Class List" section shows three entries:

No.	Name
1	DEALER
2	DF-CST_PRESA
3	DF-MXS_PRESA

At the bottom of the page, there are sections for "Claimed Customer's" and "Customer's Interest", both of which show no data available in the tables.

At the very bottom, it says "2022 © B2B CRM".

- **Steps: - How active and inactive the promotion.**

- Steps 1: - Click on toggle button and appear a pop-up model.

The screenshot shows the 'Promotions' section of the Exceltrend OMS. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management, Promotion Management (selected), and others. The main area has a search bar and a table listing two promotions. The first promotion, 'Valentine Day', has its status toggle button highlighted with a red box. The table columns include No., Business Unit, Title, Promotion Customers, Start Date, End Date, Status, and Action.

No.	Business Unit	Title	Promotion Customers	Start Date	End Date	Status	Action
1	APBW	Valentine Day	Customer	Feb 28, 2022	Mar 28, 2022	<input checked="" type="checkbox"/>	[Edit] [Delete] [View]
2	NTMC	Chine New Year	Class	Feb 06, 2022	Feb 28, 2022	<input checked="" type="checkbox"/>	[Edit] [Delete] [View]

- Steps 2: - Pop-up model appear and show message “Are you sure want to change status?” and you click on “Yes, change it” button the promotion status change.

The screenshot shows the same 'Promotions' page as before, but with a modal dialog box overlaid. The dialog has a warning icon and the text 'Are you sure want to change status?'. It contains two buttons: 'Yes, change it!' (highlighted with a red box) and 'Cancel'. Below the dialog, a note says 'Click on "Yes, change it" button the promotion status change'.

- Steps 3: - Update status show in listing page.

Promotions

No.	Business Unit	Title	Promotion Customers	Start Date	End Date	Status	Action
1	APBW	Valentine Day	Customer	Feb 28, 2022	Mar 28, 2022	<input checked="" type="checkbox"/>	
2	NTMC	Chine New Year	Class	Feb 06, 2022	Feb 28, 2022	<input checked="" type="checkbox"/>	

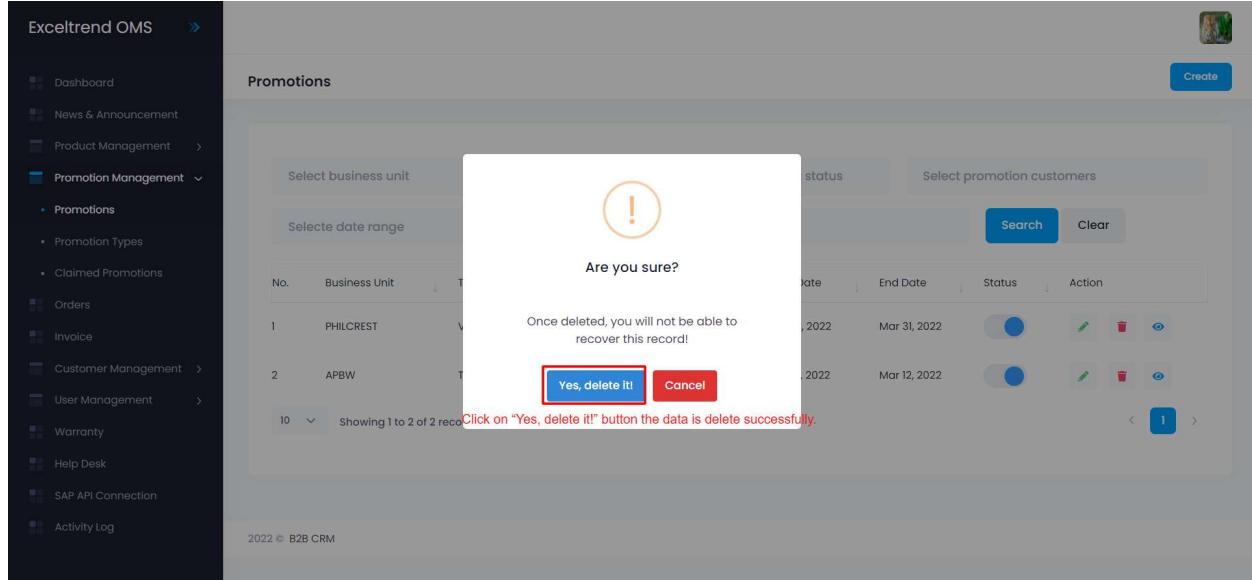
- Steps: - How to delete the promotion.

- Steps 1: - Click on trash icon and appear pop-up model.

Promotions

No.	Business Unit	Title	Promotion Customers	Start Date	End Date	Status	Action
1	PHILCREST	Valend ddtest	Class	Mar 01, 2022	Mar 31, 2022	<input checked="" type="checkbox"/>	
2	APBW	Test	Territory	Feb 16, 2022	Mar 12, 2022	<input checked="" type="checkbox"/>	

- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.

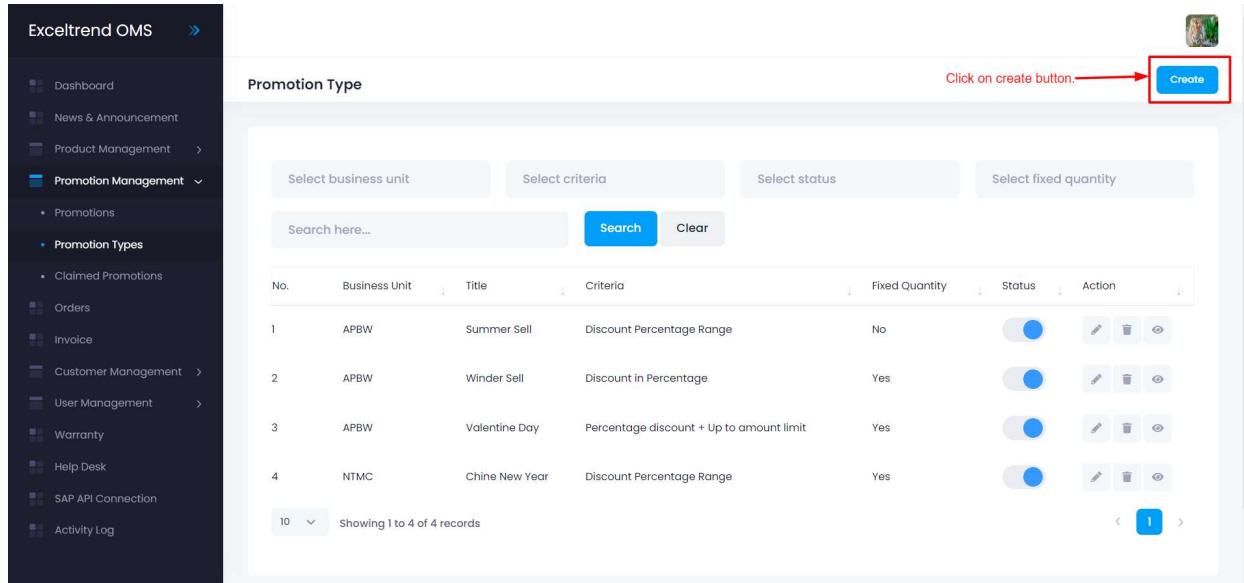


3.2. Promotion Type

- Admin can create, edit, update, delete, active and inactive the promotion.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.

Video Link: - <https://www.screencast.com/t/9rphGvn1dvS>

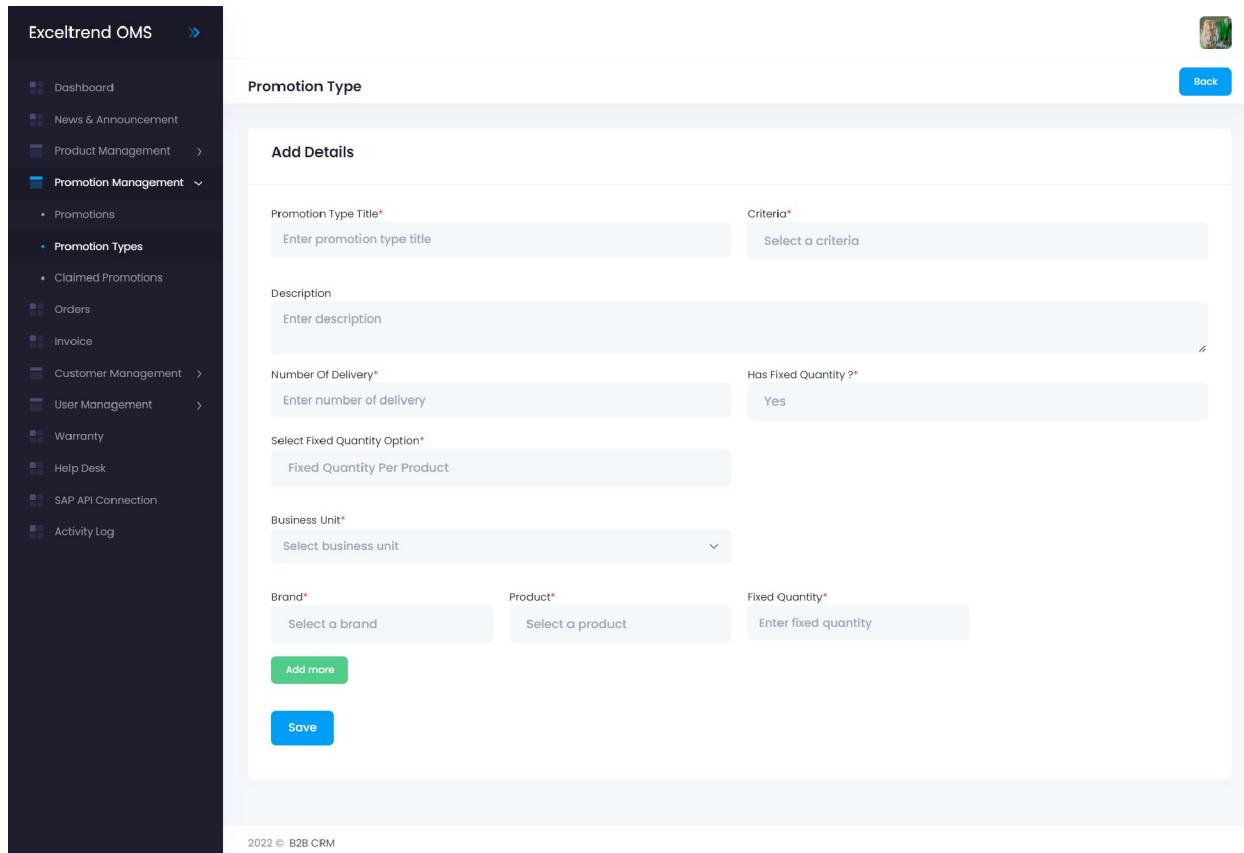
- **Steps: - How to create a new promotion type.**
 - Steps 1: - Click on create button.



The screenshot shows the 'Promotion Type' list page. At the top right, there is a blue 'Create' button with a red arrow pointing to it. Below the header, there are four search/filter fields: 'Select business unit', 'Select criteria', 'Select status', and 'Select fixed quantity'. There is also a search bar with 'Search' and 'Clear' buttons. The main area displays a table with four rows of promotion type data. Each row includes columns for No., Business Unit, Title, Criteria, Fixed Quantity, Status, and Action (with edit, delete, and view icons). At the bottom left of the table, it says 'Showing 1 to 4 of 4 records'. At the bottom right, there are navigation icons.

No.	Business Unit	Title	Criteria	Fixed Quantity	Status	Action
1	APBW	Summer Sell	Discount Percentage Range	No	<input checked="" type="checkbox"/>	
2	APBW	Winder Sell	Discount In Percentage	Yes	<input checked="" type="checkbox"/>	
3	APBW	Valentine Day	Percentage discount + Up to amount limit	Yes	<input checked="" type="checkbox"/>	
4	NTMC	Chine New Year	Discount Percentage Range	Yes	<input checked="" type="checkbox"/>	

- Steps 2: - Enter the data in promotion type title, Select the criteria, enter the description, number of deliveries, select the has fixed quantity, select the fixed quantity option, select business unit, and select brand and product.

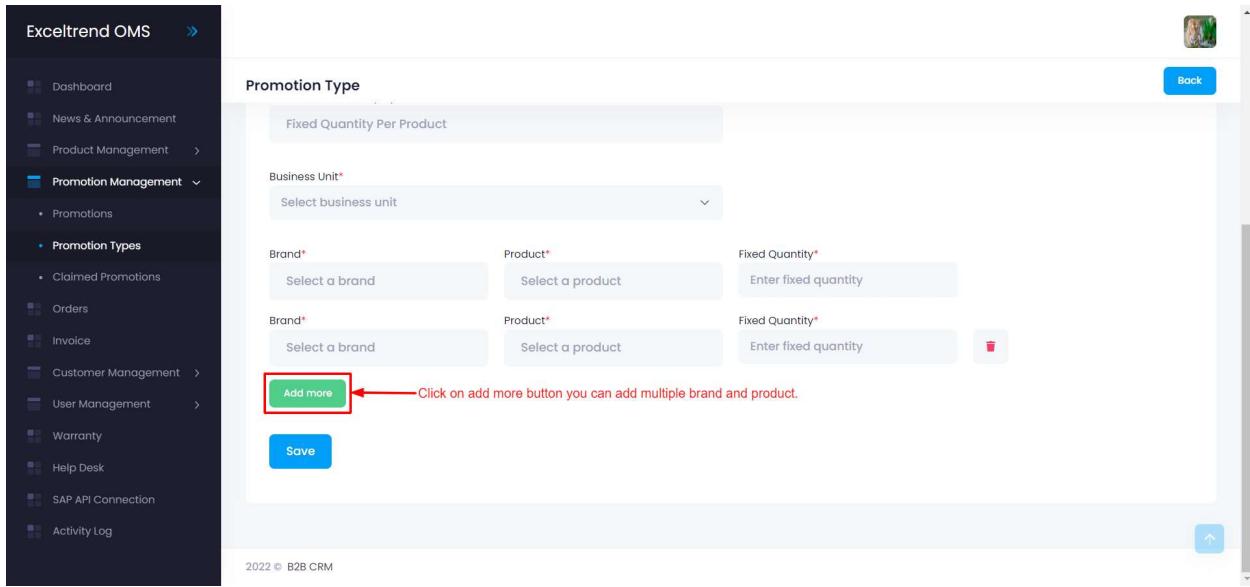


The screenshot shows the 'Add Details' form for a new promotion type. The form is divided into several sections:

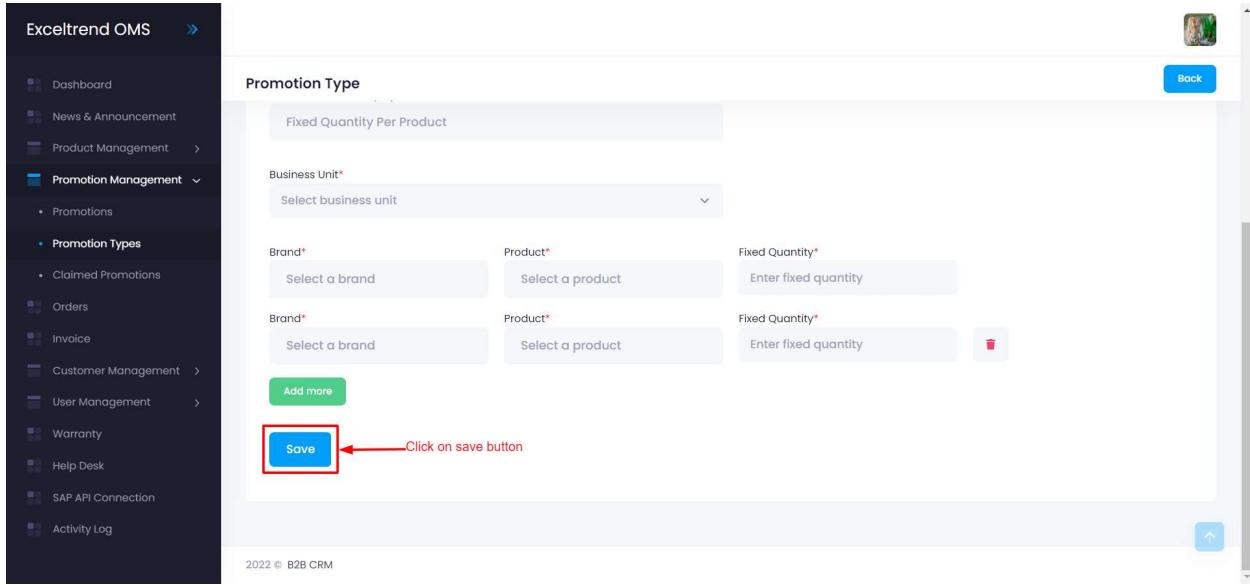
- Promotion Type Title***: An input field labeled 'Enter promotion type title'.
- Criteria***: A dropdown menu labeled 'Select a criteria'.
- Description**: An input field labeled 'Enter description'.
- Number Of Delivery***: An input field labeled 'Enter number of delivery'.
- Has Fixed Quantity ?***: A dropdown menu labeled 'Yes'.
- Select Fixed Quantity Option***: A dropdown menu labeled 'Fixed Quantity Per Product'.
- Business Unit***: A dropdown menu labeled 'Select business unit'.
- Brand***: A dropdown menu labeled 'Select a brand'.
- Product***: A dropdown menu labeled 'Select a product'.
- Fixed Quantity***: An input field labeled 'Enter fixed quantity'.

 At the bottom left is a green 'Add more' button, and at the bottom center is a blue 'Save' button. The footer of the page says '2022 © B2B CRM'.

- Steps 3: - Click on add more button you can add multiple brand and product.



- Steps 4: - Click on save button



- Steps 4: - Created promotion type show in listing page.

- Steps: - How to edit the promotion.
 - Steps 1: - Click on pencil icon.

No.	Business Unit	Title	Criteria	Fixed Quantity	Status	Action
1	PHILCREST	Moon Dhamaka	Percentage discount + Up to amount limit	No	<input checked="" type="checkbox"/>	
2	NTMC	Holi Dhamaka	Discount Percentage Range	Yes	<input checked="" type="checkbox"/>	
3	APBW	Diwali Dhamaka	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	
4	APBW	Summer Sell	Discount Percentage Range	No	<input checked="" type="checkbox"/>	
5	APBW	Winder Sell	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	
6	APBW	Valentine Day	Percentage discount + Up to amount limit	Yes	<input checked="" type="checkbox"/>	

- Steps 2: - Update the data displayed filed.

- Steps 3: - Click on update button.

Promotion Type

Number Of Delivery*
5

Has Fixed Quantity ?*
No

Business Unit*
PHILCREST

Brand*
CHEMICALS

Product*
**PHOSPHORIC ACID 85% KG...

Add more

Update

- Steps: - How to view the promotion type.

- Steps 1: - Click on eye icon.

Promotion Type

No.	Business Unit	Title	Criteria	Fixed Quantity	Status	Action		
1	PHILCREST	Moon Dhamaka	Percentage discount + Up to amount limit	No	<input checked="" type="checkbox"/>			
2	NTMC	Holi Dhamaka	Discount Percentage Range	Yes	<input checked="" type="checkbox"/>			
3	APBW	Diwali Dhamaka	Discount in Percentage	Yes	<input checked="" type="checkbox"/>			
4	APBW	Summer Sell	Discount Percentage Range	No	<input checked="" type="checkbox"/>			
5	APBW	Winder Sell	Discount in Percentage	Yes	<input checked="" type="checkbox"/>			
6	APBW	Valentine Day	Percentage discount + Up to amount limit	Yes	<input checked="" type="checkbox"/>			

- Steps 2: - Promotion type all details displayed in view page.

The screenshot shows the Exceltrend OMS system interface. On the left is a dark sidebar menu with various options like Dashboard, News & Announcement, Product Management, Promotion Management (selected), Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main content area has a header "Promotion Type" with a "Back" button and a user profile icon. Below the header is a "View Details" section containing the following information:

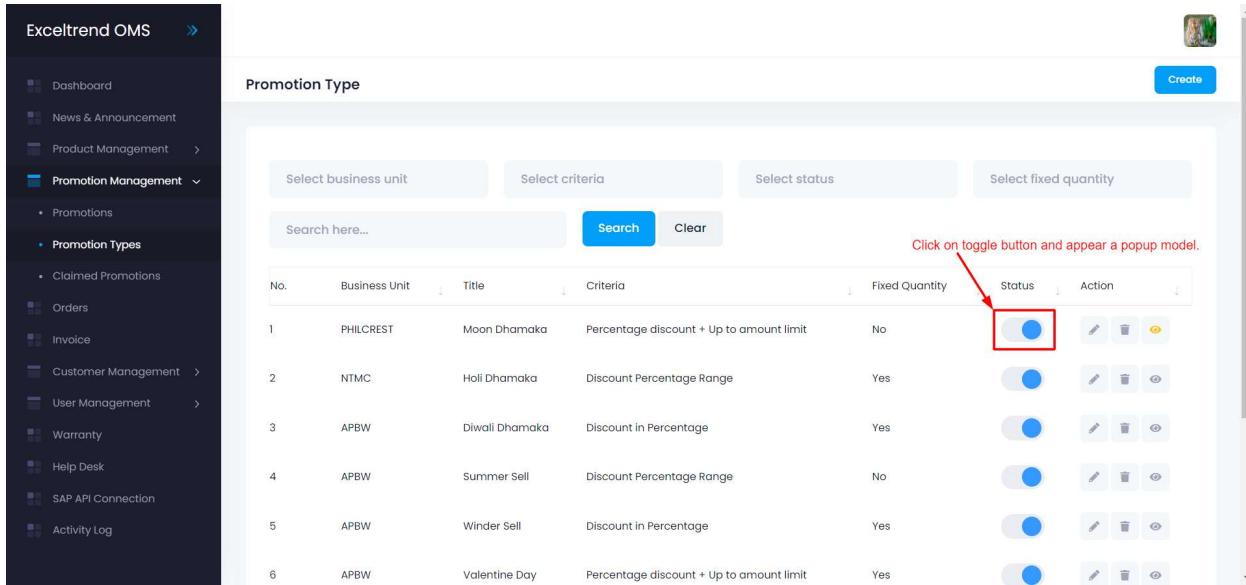
Title:	Moon Dhamaka
Description:	Moon Dhamaka
Criteria:	Percentage discount + Up to amount limit
Discount Percentage:	25 %
Discount Upto Amount:	5000
Has Fixed Quantity?:	No
Number Of Delivery:	5
Created Date:	Feb 17, 2022
Status:	Active
Business Unit:	PHILCREST

Below this is a "List Of Product" section with a table:

Brand	Product
CHEMICALS	***PHOSPHORIC ACID 85% FG (330KG) - DRUM

At the bottom left of the main content area, it says "2022 © B2B CRM".

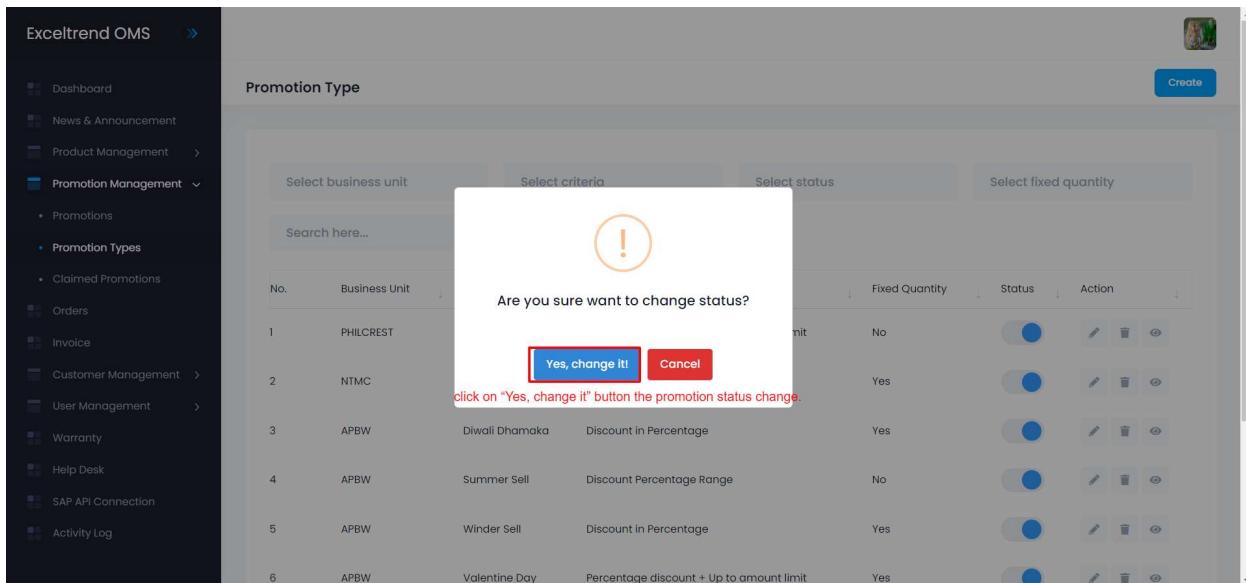
- **Steps: - How active and inactive the promotion type.**
 - Steps 1: - Click on toggle button and appear a pop-up model.



The screenshot shows the 'Promotion Management' section of the OMS ERM System. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management, etc. The 'Promotion Types' item is selected. The main area is titled 'Promotion Type' and contains a table with six rows of promotion data. Each row has a 'Status' column with a toggle switch. A red box highlights the switch in the first row, and a red arrow points to it with the text 'Click on toggle button and appear a popup model.'

No.	Business Unit	Title	Criteria	Fixed Quantity	Status	Action
1	PHILCREST	Moon Dhamaka	Percentage discount + Up to amount limit	No	<input checked="" type="checkbox"/>	edit trash eye
2	NTMC	Holi Dhamaka	Discount Percentage Range	Yes	<input checked="" type="checkbox"/>	edit trash eye
3	APBW	Diwali Dhamaka	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	edit trash eye
4	APBW	Summer Sell	Discount Percentage Range	No	<input checked="" type="checkbox"/>	edit trash eye
5	APBW	Winder Sell	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	edit trash eye
6	APBW	Valentine Day	Percentage discount + Up to amount limit	Yes	<input checked="" type="checkbox"/>	edit trash eye

- Steps 2: - Pop-up model appear and show message “Are you sure want to change status?” and you click on “Yes, change it” button the promotion status change.



This screenshot shows the same interface as the previous one, but with a modal dialog box overlaid. The dialog has a yellow exclamation mark icon and the text 'Are you sure want to change status?'. It contains two buttons: 'Yes, change it!' (highlighted with a red box) and 'Cancel'. Below the dialog, a red box highlights the 'Yes, change it!' button with the text 'click on "Yes, change it!" button the promotion status change.'

- Steps 3: - Update status show in listing page.

No.	Business Unit	Title	Criteria	Fixed Quantity	Status	Action
1	PHILCREST	Moon Dhamaka	Percentage discount + Up to amount limit	No	<input checked="" type="checkbox"/>	
2	NTMC	Holi Dhamaka	Discount Percentage Range	Yes	<input checked="" type="checkbox"/>	
3	APBW	Diwali Dhamaka	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	
4	APBW	Summer Sell	Discount Percentage Range	No	<input checked="" type="checkbox"/>	
5	APBW	Winder Sell	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	
6	APBW	Valentine Day	Percentage discount + Up to amount limit	Yes	<input checked="" type="checkbox"/>	

- Steps: - How to delete the promotion type.

- Steps 1: - Click on trash icon and appear pop-up model.

No.	Business Unit	Title	Criteria	Fixed Quantity	Status	Action
1	PHILCREST	Moon Dhamaka	Percentage discount + Up to amount limit	No	<input checked="" type="checkbox"/>	
2	NTMC	Holi Dhamaka	Discount Percentage Range	Yes	<input checked="" type="checkbox"/>	
3	APBW	Diwali Dhamaka	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	
4	APBW	Summer Sell	Discount Percentage Range	No	<input checked="" type="checkbox"/>	
5	APBW	Winder Sell	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	
6	APBW	Valentine Day	Percentage discount + Up to amount limit	Yes	<input checked="" type="checkbox"/>	

- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.

- **Steps: - How to export the data**

- Steps 1: - Click on export excel button and CSV file is downloading in your system.

The screenshot shows the 'Promotion Type' section of the Exceltrend OMS. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management, Promotion Management (selected), Promotions, Promotion Types (selected), Claimed Promotions, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main area has a title 'Promotion Type' and four filter buttons: 'Select business unit', 'Select criteria', 'Select status', and 'Select fixed quantity'. Below these is a search bar with 'Search here...', 'Search', and 'Clear' buttons. To the right of the search bar is a green 'Export Excel' button with a red arrow pointing to it and the text 'Click on export excel button'. A table below lists six promotion entries with columns: No., Business Unit, Title, Criteria, Fixed Quantity, Status, and Action. Each row has a set of edit, delete, and eye icons in the Action column.

No.	Business Unit	Title	Criteria	Fixed Quantity	Status	Action
1	PHILSYN	Dhamaka Sell ON Feb	Discount in Percentage	No	<input checked="" type="checkbox"/>	
2	PHILCREST	Moon Dhamaka	Percentage discount + Up to amount limit	No	<input checked="" type="checkbox"/>	
3	NTMC	Holi Dhamaka	Discount Percentage Range	Yes	<input checked="" type="checkbox"/>	
4	APBW	Diwali Dhamaka	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	
5	APBW	Summer Sell	Discount Percentage Range	No	<input checked="" type="checkbox"/>	
6	APBW	Winder Sell	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	

3.3. Claimed Promotions

- Admin can approve and canceled the claimed promotions.
- Admin can view the promotions.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Admin can export the promotions data.
- **Video Link:** - <https://www.screencast.com/t/1Imf8uUaSB>
- **Steps: - How to approve and canceled the claimed promotions.**
 - Steps 1: - Click on eye icon.

The screenshot shows the 'Claimed Promotions' section of the Exceltrend OMS. The left sidebar has a dark theme with various menu items like Dashboard, News & Announcement, Product Management, Promotion Management (selected), Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main area has a light background with a header 'Claimed Promotions'. Below the header are search filters: 'Select Business Unit', 'Select customer', 'Select status', and 'Select date range', followed by 'Search', 'Clear', and 'Export Excel' buttons. A table lists six rows of promotion data. The columns are: No., Company, Promotion, Customer, Date Time, Status, and Action. Row 1: APBW, Summer Sell, -, Feb 25, 2022, Pending, with an eye icon in the Action column. Row 2: APBW, Summer Sell, -, Feb 24, 2022, Pending, with an eye icon in the Action column. Row 3: APBW, Summer Sell, PATACSL, DARWIN, Feb 24, 2022, Pending, with an eye icon in the Action column. Row 4: APBW, Holi Dhamaka, PATACSL, DARWIN, Feb 22, 2022, Approved, with an eye icon in the Action column. Row 5: APBW, Holi Dhamaka, PATACSL, DARWIN, Feb 22, 2022, Canceled, with an eye icon in the Action column. Row 6: APBW, -, PATACSL, DARWIN, Feb 16, 2022, Approved, with an eye icon in the Action column.

No.	Company	Promotion	Customer	Date Time	Status	Action
1	APBW	Summer Sell	-	Feb 25, 2022	Pending	
2	APBW	Summer Sell	-	Feb 24, 2022	Pending	
3	APBW	Summer Sell	PATACSL, DARWIN	Feb 24, 2022	Pending	
4	APBW	Holi Dhamaka	PATACSL, DARWIN	Feb 22, 2022	Approved	
5	APBW	Holi Dhamaka	PATACSL, DARWIN	Feb 22, 2022	Canceled	
6	APBW	-	PATACSL, DARWIN	Feb 16, 2022	Approved	

- Steps 2: - Select the status but admin can select canceled status that time admin add reason for canceled promotions.

Exceltrend OMS

- Dashboard
- News & Announcement
- Product Management
- Promotion Management
 - Promotions
 - Promotion Types
 - **Claimed Promotions**
- Orders
- Invoice
- Customer Management
- User Management
- Warranty
- Help Desk
- SAP API Connection
- Activity Log

Claimed Promotions

Invoice

Customer: PATACSIL, DARWIN

Promotion Details:	Claimed Date:	Promotion Status:
Summer Sell	February 24, 2022	Pending

Product	Quantity	Price	Discount	Amount
CST MCT 60/80-17 TL CM619 27P	1	₱ 641.96	₱ 32.10	₱ 609.86
CST 10.00 R20 16PR CR869(+) TL	1	₱ 13,904.38	₱ 695.22	₱ 13,209.16

Subtotal: ₱ 14,546.34
 Discount: - ₱ 727.32
 Total: ₱ 13,819.02

Delivery details

Address:
test
 Test

1st Product: CST MCT 60/80-17 TL CM619 27P

Delivery Date	Delivery Quantity
March 01, 2022	1

2nd Product: CST 10.00 R20 16PR CR869(+) TL

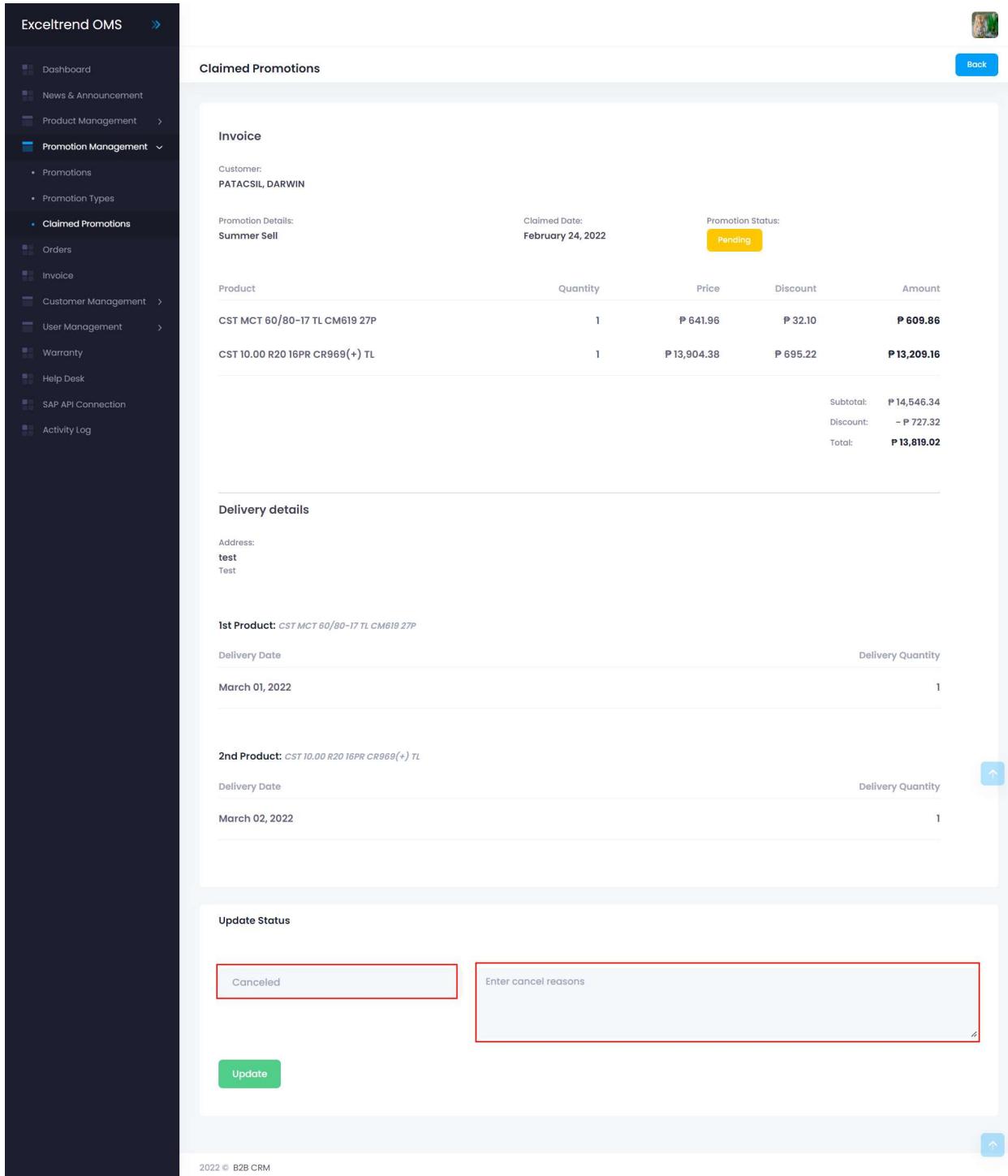
Delivery Date	Delivery Quantity
March 02, 2022	1

Approved

Canceled

Select a status

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Claimed Promotions

Invoice

Customer: PATACSIIL, DARWIN

Promotion Details: Summer Sell Claimed Date: February 24, 2022 Promotion Status: Pending

Product	Quantity	Price	Discount	Amount
CST MCT 60/80-17 TL CM618 27P	1	₱ 641.96	₱ 32.10	₱ 609.86
CST 10.00 R20 16PR CR969(+) TL	1	₱ 13,904.38	₱ 695.22	₱ 13,209.16

Subtotal: ₱ 14,546.34
Discount: - ₱ 727.32
Total: ₱ 13,819.02

Delivery details

Address: test
Test

1st Product: CST MCT 60/80-17 TL CM618 27P

Delivery Date	Delivery Quantity
March 01, 2022	1

2nd Product: CST 10.00 R20 16PR CR969(+) TL

Delivery Date	Delivery Quantity
March 02, 2022	1

Update Status

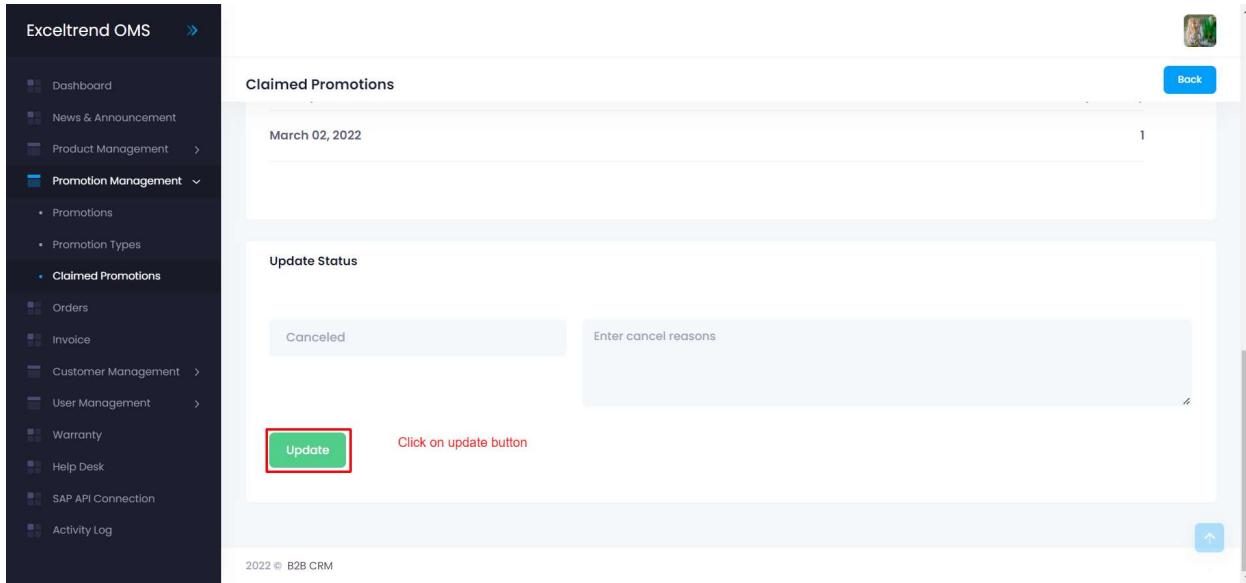
Canceled

Enter cancel reasons

Update

2022 © B2B CRM

- Steps 3: - Click on update button.



- Steps: - How to view the claimed promotions.
 - Steps 1: - Click on eye icon.

The screenshot shows the 'Claimed Promotions' page with a table of data. The columns are No., Company, Promotion, Customer, Date Time, Status, and Action. The 'Action' column contains icons, with the first one highlighted with a red box and a red arrow pointing to it from the text 'Click on eye icon'.

No.	Company	Promotion	Customer	Date Time	Status	Action
1	APBW	Summer Sell	-	Feb 25, 2022	Pending	
2	APBW	Summer Sell	-	Feb 24, 2022	Pending	
3	APBW	Summer Sell	PATACSL, DARWIN	Feb 24, 2022	Pending	
4	APBW	Holi Dhamaka	PATACSL, DARWIN	Feb 22, 2022	Approved	
5	APBW	Holi Dhamaka	PATACSL, DARWIN	Feb 22, 2022	Canceled	
6	APBW	-	PATACSL, DARWIN	Feb 16, 2022	Approved	

- Steps 2: - All details are show in view page.

Claimed Promotions

Invoice

Product	Quantity	Price	Discount	Amount
CST MCT 60/80-17 TL CM619 27P	1	₱ 719.00	₱ 35.95	₱ 683.05
CST 10.00 R20 16PR CR868(+)	1	₱ 15,572.91	₱ 778.65	₱ 14,794.26

Subtotal: ₱ 16,291.91
Discount: - ₱ 814.60
Total: ₱ 15,477.31

Delivery details

Delivery Date	Delivery Quantity
March 01, 2022	1

1st Product: CST MCT 60/80-17 TL CM619 27P

Delivery Date	Delivery Quantity
March 01, 2022	1

2nd Product: CST 10.00 R20 16PR CR868(+)

Delivery Date	Delivery Quantity
March 01, 2022	1

2022 © B2B CRM

4. Orders: -

- Admin can sync the order data over here.
- Admin view the orders.
- Admin can notify the customer orders notification.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Admin can export the order data.

- **Video Link:** - <https://www.screencast.com/t/q2TdetqnWBf>

- **Steps: - How to sync order data.**

- Steps 1: - Click on sync orders button and appear to pop-up model.

The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar menu with various options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders (which is selected and highlighted in blue), Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main content area is titled 'Orders'. At the top right of this area is a red arrow pointing to a blue rectangular button labeled 'Sync Orders'. Below the button are four search/filter fields: 'Select business unit', 'Select Customer By', 'Select customer', and 'Select date range'. Underneath these are buttons for 'Search', 'Clear', and 'Export Excel'. A table follows, displaying four rows of order data:

No	Business Unit	Order #	Customer Name	Total	Created Date	Status	Action
1	PHILSYN	101	109 AUTO SUPPLIES	₱ 0	Feb 17, 2022	Pending	
2	APBW	720	3RM CYCLE MART	₱ 14,176	Feb 17, 2022	Pending	
3	APBW	718	3RM CYCLE MART	₱ 0	Feb 17, 2022	Pending	
4	APBW	716	PATACSI, DARWIN	₱ 13,209	Feb 16, 2022	Pending	

- Steps 2: - Pop-up model appear and show message “Are you sure you want to sync orders, Quotations, and invoice data?” and click on “Yes, do it” button that time loader should be load after the message displayed sync orders successfully.

The screenshot shows the 'Orders' section of the Exceltrend OMS. A modal dialog box is centered over the table, asking 'Are you sure want to sync Orders, Quotations, and Invoice data?'. It includes a note that the sync process will run in the background. At the bottom of the dialog are two buttons: 'Yes, do it!' (highlighted with a red box) and 'Cancel'. Below the dialog, a red arrow points to the 'Eye' icon in the 'Action' column of the first row of the table.

No	Business Unit	Order #	Customer Name	Total	Created Date	Status	Action
1	PHILSYN	101	109 AUTO SUPPLIES	₱ 0	Feb 17, 2022	Pending	
2	APBW	716	3RM CYCLE MART	₱ 14,176	Feb 17, 2022	Pending	
3	APBW	718	3RM CYCLE MART	₱ 0	Feb 17, 2022	Pending	
4	APBW	716	PATACSI, DARWIN	₱ 13,209	Feb 16, 2022	Pending	

- Steps: - How to view the orders.

- Steps 1: - Click on eye icon.

The screenshot shows the same 'Orders' section as the previous one, but with a red arrow and a callout box pointing to the 'Eye' icon in the 'Action' column of the first row. The callout box contains the text 'Click on eye symbol'.

No	Business Unit	Order #	Customer Name	Total	Created Date	Status	Action
1	PHILSYN	101	109 AUTO SUPPLIES	₱ 0	Feb 17, 2022	Pending	
2	APBW	720	3RM CYCLE MART	₱ 14,176	Feb 17, 2022	Pending	
3	APBW	718	3RM CYCLE MART	₱ 0	Feb 17, 2022	Pending	
4	APBW	716	PATACSI, DARWIN	₱ 13,209	Feb 16, 2022	Pending	

- Steps 2: - Orders details are displayed in orders view page.

Order Details

Customer Name:	Customer Branch:	Delivery Address:		
109 AUTO SUPPLIES (Code: AVB-000185)	BACOLOD	109 AUTO SUPPLIES		
Sales Specialist:	Order #:	Order Date:	Status:	
MITZI FORMOSO	101	February 17, 2022	Pending	
Remarks:	-			
Product	Delivery Date	Quantity	Price	Amount
APBW COLLECTION RECEIPT - Paranaque	March 31, 2022	1	₱ 0	₱ 0
PMC STOCKS RECEIVED DOCUMENT	March 31, 2022	1	₱ 0	₱ 0
				Total: ₱ 0

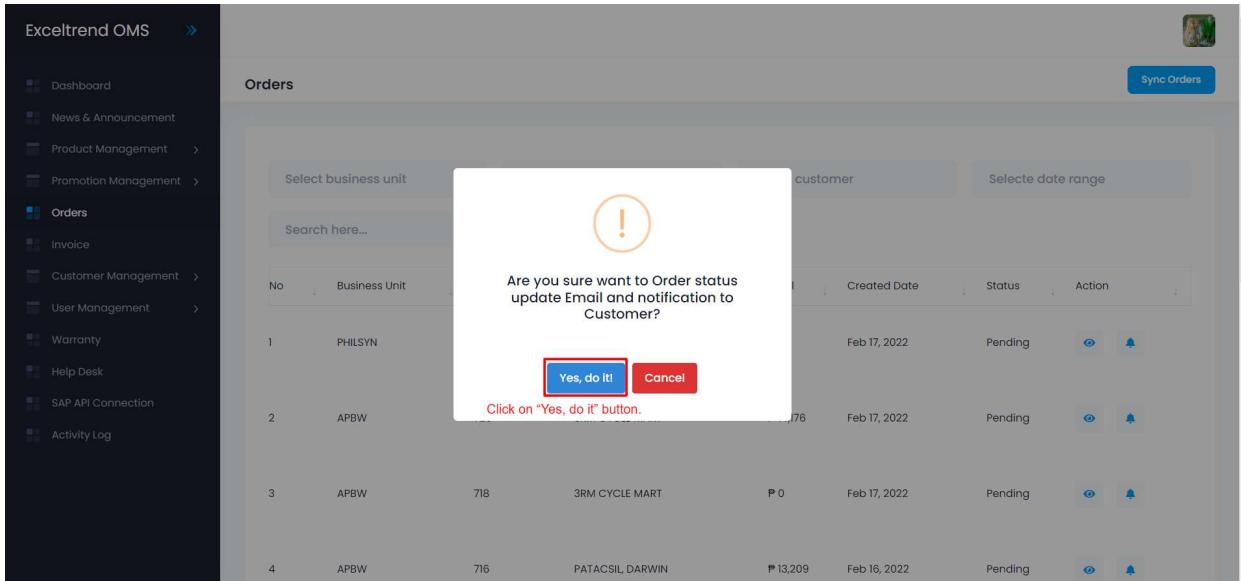
- **Steps: - How to notify the customer orders status.**

- Steps 1: - Click on bell icon and appear pop-up model.

Orders

No	Business Unit	Order #	Customer Name	Total	Created Date	Status	Action
1	PHILSYN	101	109 AUTO SUPPLIES	₱ 0	Feb 17, 2022	Pending	
2	APBW	720	3RM CYCLE MART	₱ 14,176	Feb 17, 2022	Pending	
3	APBW	718	3RM CYCLE MART	₱ 0	Feb 17, 2022	Pending	
4	APBW	716	PATACSI, DARWIN	₱ 13,209	Feb 16, 2022	Pending	

- Steps 2: - Pop-up model appear and show message “Are you sure you want to orders status update email and notification to customer” and click on “Yes, do it” button that time loader should be load after the message displayed sync status update email and notification has been sent successfully.



5. Invoice: -

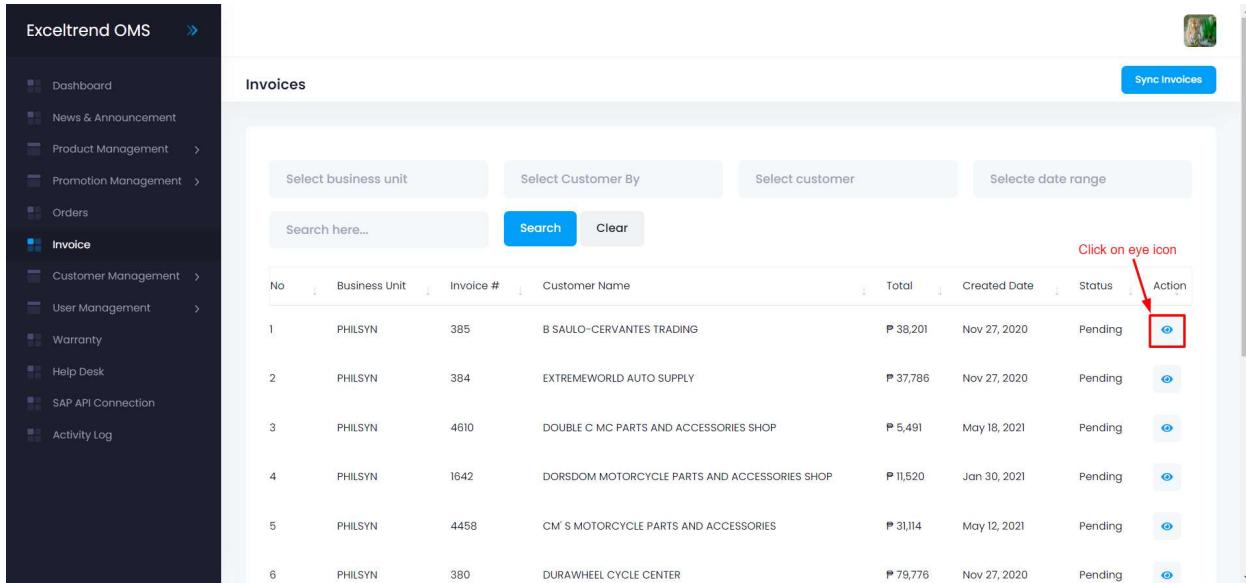
- Admin can sync the order data over here.
 - Admin view the orders.
 - Admin can notify the customer orders notification.
 - Admin can search the data using search box through.
 - Admin can use the different-different filter and filter the data.
 - Admin can export the order data.
 - **Video Link:** - <https://www.screencast.com/t/mic1Ky0Nl>
 - **Steps: -How to sync order data.**
 - Steps 1: - Click on sync invoice button and appear to pop-up model.

The screenshot shows the 'Invoices' section of the Exceltrend OMS system. At the top, there are four search/filter fields: 'Select business unit', 'Select Customer By', 'Select customer', and 'Select date range'. Below these is a search bar with 'Search' and 'Clear' buttons. The main area displays a table of invoices with columns: No, Business Unit, Invoice #, Customer Name, Total, Created Date, Status, and Action. The table contains 6 rows of invoice data. A red box highlights the 'Sync Invoices' button in the top right corner of the header.

- Steps 2: - Pop-up model appear and show message “Are you sure you want to sync invoice data?” and click on “Yes, do it” button that time loader should be load after the message displayed sync invoice successfully.

The screenshot shows the same 'Invoices' page as above, but with a modal dialog box overlaid. The dialog has a yellow exclamation mark icon and asks 'Are you sure want to sync Invoice data?'. It also states 'Syncing process will run in background and it may take some time to sync all Data.' At the bottom of the dialog, there are two buttons: 'Yes, do it!' (highlighted with a red box) and 'Cancel'. A red box also highlights the 'Yes, do it!' button on the dialog.

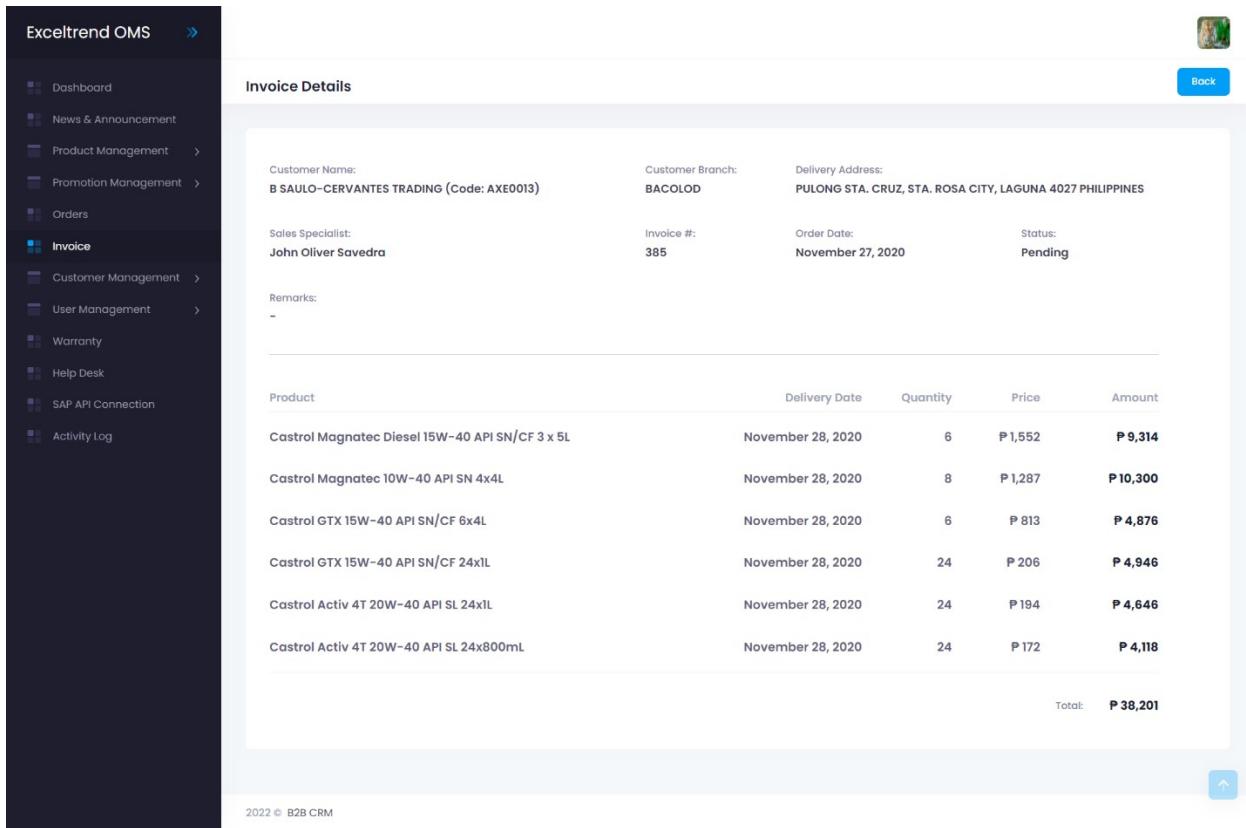
- Steps: - How to view the invoice.
 - Steps 1: - Click on eye icon.



The screenshot shows the 'Invoices' page of the Exceltrend OMS system. The left sidebar contains navigation links for Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice (which is selected), Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main area is titled 'Invoices' and includes search and filter options: 'Select business unit', 'Select Customer By', 'Select customer', and 'Select date range'. Below these are search fields for 'Search here...' and buttons for 'Search' and 'Clear'. A table lists six invoices from 'PHILSYN' with columns for No., Business Unit, Invoice #, Customer Name, Total, Created Date, Status, and Action. The 'Action' column contains an eye icon. A red box highlights the eye icon in the first row, and a red arrow points to it with the text 'Click on eye icon'.

No	Business Unit	Invoice #	Customer Name	Total	Created Date	Status	Action
1	PHILSYN	385	B SAULO-CERVANTES TRADING	₱ 38,201	Nov 27, 2020	Pending	
2	PHILSYN	384	EXTREMORLD AUTO SUPPLY	₱ 37,786	Nov 27, 2020	Pending	
3	PHILSYN	4610	DOUBLE C MC PARTS AND ACCESSORIES SHOP	₱ 5,491	May 18, 2021	Pending	
4	PHILSYN	1642	DORSODOM MOTORCYCLE PARTS AND ACCESSORIES SHOP	₱ 11,520	Jan 30, 2021	Pending	
5	PHILSYN	4458	CM'S MOTORCYCLE PARTS AND ACCESSORIES	₱ 31,114	May 12, 2021	Pending	
6	PHILSYN	380	DURAWHEEL CYCLE CENTER	₱ 79,776	Nov 27, 2020	Pending	

- Steps 2: - invoice details are displayed in invoice view page.



The screenshot shows the 'Invoice Details' page for Invoice #385. The left sidebar is identical to the previous screenshot. The main area is titled 'Invoice Details' and displays the following information: Customer Name: B SAULO-CERVANTES TRADING (Code: AXE0013), Customer Branch: BACOLOD, Delivery Address: PULONG STA. CRUZ, STA. ROSA CITY, LAGUNA 4027 PHILIPPINES. Sales Specialist: John Oliver Savedra, Invoice #: 385, Order Date: November 27, 2020, Status: Pending. Remarks: -. Below this is a table of products with columns for Product, Delivery Date, Quantity, Price, and Amount. The table lists several Castrol oil products. A red box highlights the eye icon in the Product column of the first row of the table, and a red arrow points to it with the text 'Click on eye icon'.

Product	Delivery Date	Quantity	Price	Amount
Castrol Magnatec Diesel 15W-40 API SN/CF 3x5L	November 28, 2020	6	₱ 1,552	₱ 9,314
Castrol Magnatec 10W-40 API SN 4x4L	November 28, 2020	8	₱ 1,287	₱ 10,300
Castrol GTX 15W-40 API SN/CF 6x4L	November 28, 2020	6	₱ 813	₱ 4,876
Castrol GTX 15W-40 API SN/CF 24x1L	November 28, 2020	24	₱ 206	₱ 4,946
Castrol Activ 4T 20W-40 API SL 24x800mL	November 28, 2020	24	₱ 194	₱ 4,646
Castrol Activ 4T 20W-40 API SL 24x800mL	November 28, 2020	24	₱ 172	₱ 4,118

Total: ₱ 38,201

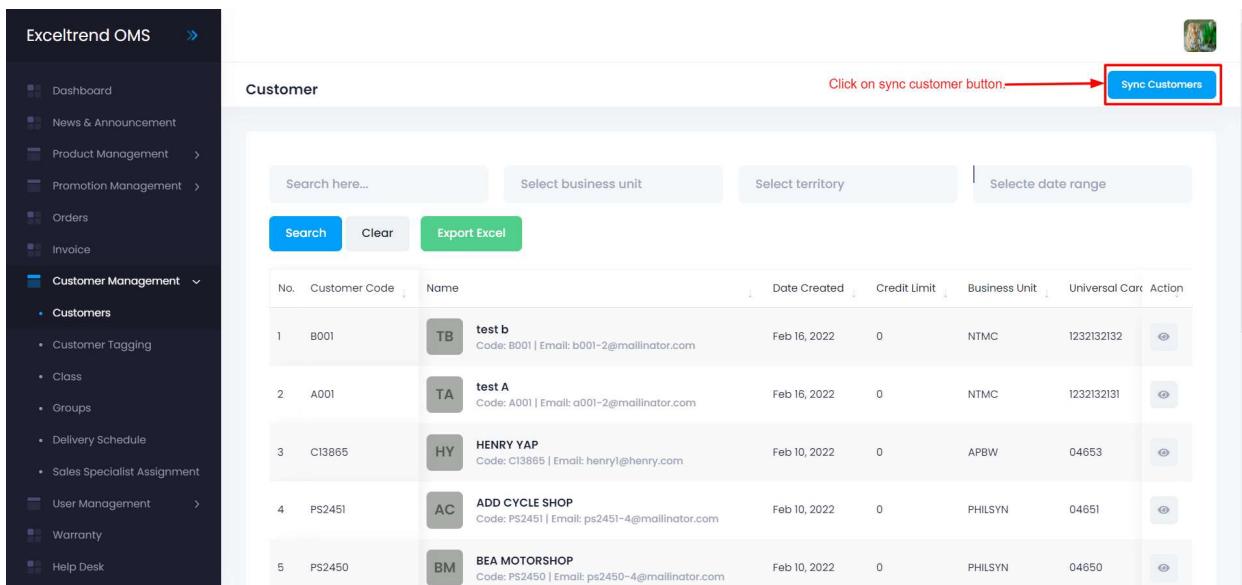
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6. Customer Management Module: -

- There are six sub modules in this module and all modules explain in details one by one

6.1. Customers

- Admin can sync the customers data over here.
- Admin view the customers details over here.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Admin can export the order data.
- Video link: - <https://www.screencast.com/t/JUscZ168>
- **Steps: -How to sync customers data.**
 - Steps 1: - Click on sync customer button and appear to pop-up model.



The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with navigation links: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), Customer Tagging, Class, Groups, Delivery Schedule, Sales Specialist Assignment, User Management, Warranty, and Help Desk. The main area is titled 'Customer' and displays a list of customers with columns for No., Customer Code, Name, Date Created, Credit Limit, Business Unit, Universal Carr, and Action. The 'Sync Customers' button is highlighted with a red box and an arrow pointing to it from the text above.

No.	Customer Code	Name	Date Created	Credit Limit	Business Unit	Universal Carr	Action
1	B001	TB Code: B001 Email: b001-2@mailinator.com	Feb 16, 2022	0	NTMC	I232132132	
2	A001	TA Code: A001 Email: a001-2@mailinator.com	Feb 16, 2022	0	NTMC	I232132131	
3	C13865	HY HENRY YAP Code: C13865 Email: henryl@henry.com	Feb 10, 2022	0	APBW	04653	
4	PS2451	AC ADD CYCLE SHOP Code: PS2451 Email: ps2451-4@mailinator.com	Feb 10, 2022	0	PHILSYN	04651	
5	PS2450	BM BEA MOTORSHOP Code: PS2450 Email: ps2450-4@mailinator.com	Feb 10, 2022	0	PHILSYN	04650	

- Steps 2: - Pop-up model appear and show message “Are you sure you want to sync invoice data?” and click on “Yes, do it” button that time loader should be load after the message displayed sync invoice successfully.

The screenshot shows the Exceltrend OMS Customer Management page. On the left, a sidebar menu includes options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), User Management, Warranty, and Help Desk. The main area is titled 'Customer' and contains a table of customer data. A modal dialog box is overlaid on the page, asking 'Are you sure you want to Sync Customers?'. It explains that the sync process will run in the background and may take some time. Two buttons are present: 'Yes, do it!' (highlighted with a red box) and 'Cancel'. Below the dialog, a note says 'Click on "Yes, do it" button.' The table in the background lists five customers with columns for No., Customer Code, Name, Date Created, Credit Limit, Business Unit, Universal Carr, and Action.

No.	Customer Code	Name	Date Created	Credit Limit	Business Unit	Universal Carr	Action
1	B001	TB	Feb 16, 2022	0	NTMC	I232132132	
2	A001	TA	Feb 16, 2022	0	NTMC	I232132131	
3	CI3865	HY	Feb 10, 2022	0	APBW	04653	
4	PS2451	AC	Feb 10, 2022	0	PHILSYN	04651	
5	PS2450	BM	Feb 10, 2022	0	PHILSYN	04650	

- Steps: - How to view the Customer details.
 - Steps 1: - Click on eye icon.

The screenshot shows the same Customer Management page after the sync process has been completed. The modal dialog from the previous screenshot is no longer visible. A red arrow points to the 'Action' column of the first customer row, specifically to the eye icon, with the text 'Click on eye icon.' above it. The customer data table remains the same as in the previous screenshot.

No.	Customer Code	Name	Date Created	Credit Limit	Business Unit	Universal Carr	Action
1	B001	test b Code: B001 Email: b001-2@mailinator.com	Feb 16, 2022	0	NTMC	I232132132	
2	A001	test A Code: A001 Email: a001-2@mailinator.com	Feb 16, 2022	0	NTMC	I232132131	
3	CI3865	HENRY YAP Code: CI3865 Email: henryl@henry.com	Feb 10, 2022	0	APBW	04653	
4	PS2451	ADD CYCLE SHOP Code: PS2451 Email: ps2451-4@mailinator.com	Feb 10, 2022	0	PHILSYN	04651	
5	PS2450	BEA MOTORSHOP Code: PS2450 Email: ps2450-4@mailinator.com	Feb 10, 2022	0	PHILSYN	04650	

- Steps 2: - customer details are displayed in customer view page.

The screenshot shows the Exceltrend OMS Customer Management interface. On the left is a dark sidebar menu with various options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), User Management, Warranty, and Help Desk. The main content area has a header "Customer" with a "Back" button and a small profile picture. Below is a "View Details" section with the following data:

Business Unit:	NTMC
Card Code:	B001
Universal Card Code:	I232I32I32
Card Name:	test b
Group Name:	BACOLOD
OMS Email:	b001-2@mailinator.com
Email:	
Contact Person Name:	
Class:	
Address:	
Territory:	
Credit Limit:	0
Federal Tax ID:	
Current Account Balance:	0
Created Date:	Feb 18, 2022
Status:	Active

Below this is a section titled "Customer's Address Details" which contains a table with no data available.

No.	Type	Address	Street
No data available in table			

At the bottom left is a footer note: "2022 © B2B CRM".

6.2. Customer Tagging

- Admin view the customers tagging details over here.
- Admin can use the different-different filter and filter the data.
- Admin can export the order data.
- Video Link: - <https://www.screencast.com/t/tputb5XepJA>

Customer Tagging

No.	Customer Code	Customer Name	Customer Class	Customer Segment	Market Sector	Market Sub-Sector
1	B001	test b	-	-	-	-
2	A001	test A	-	-	-	-
3	C13865	HENRY YAP	RA	-	NONE	DLR
4	PS2451	ADD CYCLE SHOP	-	-	-	-
5	PS2450	BEA MOTORSHOP	-	-	-	-
6	C11646E	NARI CYCLE CENTER	RA	-	-	DLR
7	C11646D	RADZ CYCLE CENTER	RA	-	-	DLR
8	C13864	FRED Z. GAILO	RA	-	-	OTHERS
9	C13926	FUZHOU DAOHE LUBRICATING OIL CO.,LTD	RA	-	NONE	OTHERS
10	C00993B	TECH AUTO PARTS AND SERVICES	RA	-	RTL	DLR
11	C13863	SE TIRES & MAGS TRADING	RA	-	-	DLR
12	C13862	TIRE TRADING	RA	-	-	DLR
13	C13861	C. ZAMORA	RA	-	-	OTHERS
14	C13925	JEVA SUPERMART INC.	RA	-	RTL	OTHERS
15	C13924	ON M. PIOQUINTO	RA	-	MRN	NONE
16	C12929	9 MULTISALES, INC.	RA	-	NONE	NONE
17	C13922	9RATED POWER INDUSTRIES PTE LTD	RA	-	MRN	NONE
18	C13928	KETT MACHINE OIL DRAGO	RA	-	NONE	NONE
100		Showing 1 to 100 of 5,440 records				

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6.3. Class

- Admin view the customer class over here.
- Admin can search the data using the search box.
- Video Link: - <https://www.screencast.com/t/jgCkBxIHCYD>

No.	Name
1	DF-MXS_PRESA
2	DF-CST_PRESA
3	MDP
4	ENTRY
5	REGULAR
6	DEALER
7	FLAGSHIP
8	OA
9	RA

Showing 1 to 9 of 9 records

6.4. Groups

- Admin can sync the customers group data over here.
- Admin view the customers group details over here.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Video link: - <https://www.screencast.com/t/sP2mkhpU>
- **Steps: - How to sync customers group data.**
 - Steps 1: - Click on sync customer group button and appear to pop-up model.

The screenshot shows the 'Customer Group' section of the Exceltrend OMS. On the left is a dark sidebar with various menu items. Under 'Customer Management', the 'Groups' option is selected. The main area displays a table of customer groups with columns for No., Business Unit, Code, and Name. A red arrow points to the 'Sync Customer Groups' button at the top right of the table area.

No.	Business Unit	Code	Name
1	PHILSYN	111	EMPLOYEE
2	PHILSYN	124	TACLOBAN
3	PHILSYN	123	MARINE
4	PHILSYN	122	ILOILO
5	PHILSYN	121	DUMAGUETE
6	PHILSYN	120	DAVAO
7	PHILSYN	119	CEBU
8	PHILSYN	118	CAGAYAN
9	PHILSYN	117	BOHOL

- Steps 2: - Pop-up model appear and show message “Are you sure you want to sync invoice data?” and click on “Yes, do it” button that time loader should be load after the message displayed sync invoice successfully.

The screenshot shows the same 'Customer Group' page as above, but with a modal dialog box overlaid. The dialog contains a large exclamation mark icon and the text "Are you sure you want to Sync Customer Groups?". Below this, a smaller note says "Syncing process will run in background and it may take some time to sync all Customer Groups Data." At the bottom of the dialog are two buttons: "Yes, do it!" (highlighted with a red box) and "Cancel". A red arrow points to the "Yes, do it!" button. The background table of customer groups is partially visible behind the dialog.

6.5. Delivery Schedule

- Admin can create, edit, update and delete the customer delivery schedule.
- Admin can search the data using search box.
- Admin can use the different-different filter and filter the data.
- **Video Link:** - <https://www.screencast.com/t/d3KqvXTCe>

- **Steps: - How to create a customer delivery schedule.**
 - Steps 1: - Click on new schedule button.

No.	Customer	Territory	Action
1	BELUGA AUTO CARE & MERCHANDISE	AGUSAN DEL NORTE	
2	AISIN AUTO SUPPLY	AGUSAN DEL NORTE	
3	ADFIL CORPORATION	AGUSAN DEL NORTE	
4	ESTRADA, MA. CHEZKA P.	ABRA	
5	PHILIPPINES TRC INC.	BATANGAS	
6	PARAMOUNT MARKETING	BATANGAS	
7	ADIONG, WARLY	-No Territory-	

- Steps 2: - Select the territory, select the customers, and select the schedule dates.

The screenshot shows the 'Customer Delivery Schedule' form. On the left is a dark sidebar with navigation options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), Delivery Schedule, Sales Specialist Assignment, User Management, Warranty, and Help Desk. The main area has a title 'Customer Delivery Schedule' and a sub-section 'Add Details'. It contains three required fields: 'Territory*', 'Customers*', and 'Schedule Dates*'. Each field has a dropdown placeholder ('Select Territory', 'Select Customers', 'Schedule Dates'). Below these is a blue 'Save' button. In the top right corner is a small user profile icon, and in the top right of the main area is a 'Back' button.

- Steps 3: - Click on save button.

This screenshot is identical to the previous one, showing the 'Customer Delivery Schedule' form. The red box highlights the 'Territory*', 'Customers*', and 'Schedule Dates*' fields. However, the 'Save' button at the bottom is now highlighted in blue, indicating it has been clicked. A red arrow points to the 'Save' button with the text 'Click on save button'.

- Steps 4: - Created delivery schedule is display in listing page.

No.	Customer	Territory	Action
1	BELUGA AUTO CARE & MERCHANDISE	AGUSAN DEL NORTE	
2	AISIN AUTO SUPPLY	AGUSAN DEL NORTE	
3	ADFIL CORPORATION	AGUSAN DEL NORTE	
4	ESTRADA, MA. CHEZKA P.	ABRA	
5	PHILIPPINES TRC INC.	BATANGAS	
6	PARAMOUNT MARKETING	BATANGAS	
7	ADIONG, WARLY	-No Territory-	

- Steps: - How to edit the delivery schedule
 - Steps: - 1 Click on edit icon.

No.	Customer	Territory	Action
1	BELUGA AUTO CARE & MERCHANDISE	AGUSAN DEL NORTE	
2	AISIN AUTO SUPPLY	AGUSAN DEL NORTE	
3	ADFIL CORPORATION	AGUSAN DEL NORTE	
4	ESTRADA, MA. CHEZKA P.	ABRA	
5	PHILIPPINES TRC INC.	BATANGAS	
6	PARAMOUNT MARKETING	BATANGAS	
7	ADIONG, WARLY	-No Territory-	

- Steps: - 2 Update the data.

Customer Delivery Schedule

Update Details

Territory*
AGUSAN DEL NORTE

Customers*
BELUGA AUTO CARE & MERCHANDISE

Schedule Dates*
22/02/2022, 24/02/2022, 25/02/2022, 01/03/2022, 02/03/2022

Update

- Steps: - 3 Click on Update button.

Customer Delivery Schedule

Update Details

Territory*
AGUSAN DEL NORTE

Customers*
BELUGA AUTO CARE & MERCHANDISE

Schedule Dates*
22/02/2022, 24/02/2022, 25/02/2022, 01/03/2022, 02/03/2022

Update ← Click on Update button

- Steps: - How to view the delivery schedule
 - Steps 1: - Click eye icon.

Customer Delivery Schedule

No.	Customer	Territory	Action
1	BELUGA AUTO CARE & MERCHANDISE	AGUSAN DEL NORTE	
2	AISIN AUTO SUPPLY	AGUSAN DEL NORTE	
3	ADFIL CORPORATION	AGUSAN DEL NORTE	
4	ESTRADA, MA. CHEZKA P.	ABRA	
5	PHILIPPINES TRC INC.	BATANGAS	
6	PARAMOUNT MARKETING	BATANGAS	
7	ADIONG, WARLY	-No Territory-	

- Steps 2: - All schedule date show for particular customer over here.

Customer Delivery Schedule

Customer : BELUGA AUTO CARE & MERCHANDISE

Schedule Details

2020	2021	2022	2023	2024
January	February	March	April	
Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
May	June	July	August	
Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa

- Steps: - How to delete the delivery schedule
 - Steps 1: - Click on trash icon and appear pop-up model.

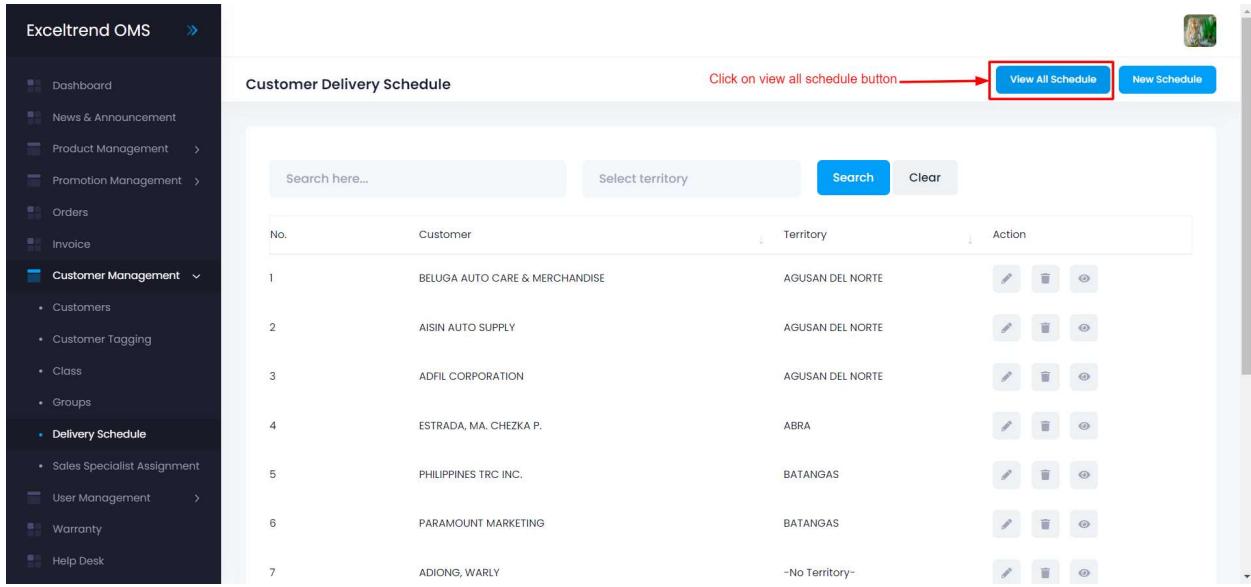
The screenshot shows the 'Customer Delivery Schedule' page within the Exceltrend OMS system. The left sidebar contains a navigation menu with 'Customer Management' expanded, showing 'Delivery Schedule' as one of its items. The main area displays a table of delivery schedules with columns for No., Customer, Territory, and Action. The 'Action' column includes icons for edit, delete, and details. A red box highlights the delete icon for the first row, and a red arrow points to it with the instruction 'Click on trash icon'.

No.	Customer	Territory	Action
1	BELUGA AUTO CARE & MERCHANDISE	AGUSAN DEL NORTE	
2	AISIN AUTO SUPPLY	AGUSAN DEL NORTE	
3	ADFIL CORPORATION	AGUSAN DEL NORTE	
4	ESTRADA, MA. CHEZKA P.	ABRA	
5	PHILIPPINES TRC INC.	BATANGAS	
6	PARAMOUNT MARKETING	BATANGAS	
7	ADIONG, WARLY	-No Territory-	

- Steps 2: - Pop-up model appear and show message "Are you sure?" and click on "Yes, delete it!" button the data is delete successfully.

The screenshot shows the same 'Customer Delivery Schedule' page after a row has been selected for deletion. A modal dialog box appears in the center, containing a large exclamation mark icon and the text 'Are you sure?'. Below this, a smaller message says 'Once deleted, you will not be able to recover this record!'. At the bottom of the dialog are two buttons: 'Yes, delete it!' (highlighted with a red box) and 'Cancel'. A red arrow points to the 'Yes, delete it!' button with the instruction 'Click on "Yes, delete it!" Button'.

- Steps: - How to view all delivery schedule
 - Steps 1: - Click on view all schedule button.



The screenshot shows the 'Customer Delivery Schedule' page within the Exceltrend OMS system. The left sidebar contains a navigation menu with categories like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (with sub-options like Customers, Customer Tagging, Class, Groups, Delivery Schedule, Sales Specialist Assignment), User Management, Warranty, and Help Desk. The main content area is titled 'Customer Delivery Schedule'. At the top right, there are buttons for 'View All Schedule' (highlighted with a red box and arrow), 'New Schedule', and user profile. Below these are search and filter options: 'Search here...', 'Select territory', 'Search', and 'Clear'. The main table lists 7 rows of data:

No.	Customer	Territory	Action
1	BELUGA AUTO CARE & MERCHANDISE	AGUSAN DEL NORTE	
2	AISIN AUTO SUPPLY	AGUSAN DEL NORTE	
3	ADFIL CORPORATION	AGUSAN DEL NORTE	
4	ESTRADA, MA. CHEZKA P.	ABRA	
5	PHILIPPINES TRC INC.	BATANGAS	
6	PARAMOUNT MARKETING	BATANGAS	
7	ADIONG, WARLY	-No Territory-	

- Steps 2: - All customer delivery schedule is display in calendar or you can check filter through particular customer delivery schedule.

Exceltrend OMS

- Dashboard
- News & Announcement
- Product Management
- Promotion Management
- Orders
- Invoice
- Customer Management**
 - Customers
 - Customer Tagging
 - Class
 - Groups
 - Delivery Schedule**
 - Sales Specialist Assignment
 - User Management
 - Warranty
 - Help Desk

Customer Delivery Schedule

Select Customer:

Schedule Details

February 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31		1	2	3	4
			ABATO, RICHARD (Code: E) ABELLANA, RUBETH (Code: E) +6 more	007ENCARR TIRE TRADING 086 TRADING (Code: COIE) 1-STOP-AUTOSHOP AUTO		007ENCARR TIRE TRADING
6	7	8	9	10	11	12
				ABATO, RICHARD (Code: E) ABELLANA, RUBETH (Code: E) +6 more		
13	14	15	16	17	18	19
			ABATO, RICHARD (Code: E) ABELLANA, RUBETH (Code: E) +6 more	ABATO, RICHARD (Code: E) ABELLANA, RUBETH (Code: E) +6 more		
20	21	22	23	24	25	26
			ABATO, RICHARD (Code: E) ABELLANA, RUBETH (Code: E) +8 more	ADFL CORPORATION (Code: COIE) AISIN AUTO SUPPLY (Code: COIE) BELUGA AUTO CARE & MFG	ADFL CORPORATION (Code: COIE) AISIN AUTO SUPPLY (Code: COIE) BELUGA AUTO CARE & MFG	
27	28	1	2	3	4	5
			ADFL CORPORATION (Code: COIE) AISIN AUTO SUPPLY (Code: COIE) +4 more	ADFL CORPORATION (Code: COIE) AISIN AUTO SUPPLY (Code: COIE) BELUGA AUTO CARE & MFG		
6	7	8	9	10	11	12
				007ENCARR TIRE TRADING 086 TRADING (Code: COIE) 1-STOP-AUTOSHOP AUTO		

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The screenshot shows the 'Customer Delivery Schedule' page within the Exceltrend OMS system. On the left, a dark sidebar menu lists various modules: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), Delivery Schedule (selected), Sales Specialist Assignment, User Management, Warranty, and Help Desk. The 'Customer Management' and 'Delivery Schedule' sections are expanded, showing sub-options like Customers, Customer Tagging, Class, Groups, and Delivery Schedule.

The main content area is titled 'Customer Delivery Schedule'. It features a search bar labeled 'Select customer' and a list of customer names:

- PARAMOUNT MARKETING
- ADFIL CORPORATION
- BELUGA AUTO CARE & MERCHANDISE
- ESTRADA, MA. CHEZKA P.
- ABELLO, REQUE

A red box highlights the first item, 'PARAMOUNT MARKETING'. To the right of the list, a message says 'Select the customer name'. Below the list is a grid showing delivery slots for days 6 through 12. The grid contains the following data:

Slot	Customer Name	Code
8	ABATO, RICHARD	007ENCARR TIRE TRADING
8	ABELLANA,RUBETH	086 TRADING (Code: C01)
8	+6 more	I-STOP-AUTOSHOP AUTO
11	ABATO, RICHARD	007ENCARR TIRE TRADING
11	ABELLANA,RUBETH	086 TRADING (Code: C01)

Exceltrend OMS

- Dashboard
- News & Announcement
- Product Management
- Promotion Management
- Orders
- Invoice
- Customer Management**
 - Customers
 - Customer Tagging
 - Class
 - Groups
 - Delivery Schedule**
 - Sales Specialist Assignment
- User Management
- Warranty
- Help Desk

Customer Delivery Schedule

Select Customer: PARAMOUNT MARKETING

Schedule Details

February 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	1	2	3	4	5
6	7	8	9	10	11	12

Customer's Address Details

No.	Type	Address	Street
1	Billing	PARAMOUNT MARKETING	229 PANINGSINGIN ST TAMBO LIPA CITY

Showing 1 to 1 of 1 records

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6.6. Sales Specialist Assignment

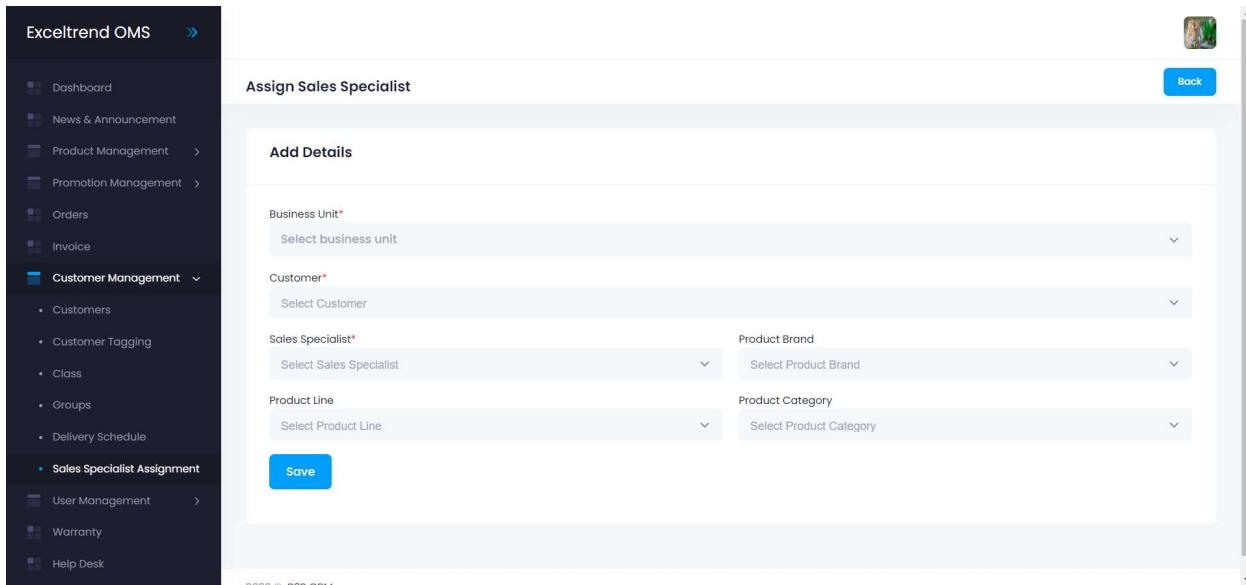
- Admin can create, edit, update and delete the Sales Specialist Assignment.
- Admin can search the data using search box.
- Admin can use the different-different filter and filter the data.
- Admin can upload the assignment using excel sheet through.
- **Video Link:** - <https://www.screencast.com/t/GWUxUCdxknyH>

- **Steps: - How to create a sales specialist assignment.**
 - Steps 1: - Click on new assignment button.

The screenshot shows the 'Customer Sales Specialist' page within the Exceltrend OMS system. The left sidebar contains a navigation menu with various modules like Dashboard, News & Announcement, Product Management, etc. The 'Customer Management' and 'Sales Specialist Assignment' sections are expanded, showing sub-options like Customers, Customer Tagging, Class, Groups, Delivery Schedule, and Sales Specialist Assignment. The main content area is titled 'Customers Sales Specialist' and displays a table of assignments. The table has columns for No., Business Unit, Customer, and Action. There are 7 rows of data. At the top right of the content area, there are two buttons: 'Upload Assignment' and 'New Assignment'. A red box and an arrow point to the 'New Assignment' button, with a tooltip 'Click on new assignment button.' positioned above it.

No.	Business Unit	Customer	Action
1	APBW	A.H. SHOPPER'S MART	
2	APBW	A.G. COMBE T/S	
3	APBW	A.C. LIWANAG GRAVEL & SAND	
4	APBW	BPLY TIRE TRADING	
5	APBW	7J AUTOWORX SERVICE CENTER	
6	APBW	5SZAIDEN TRANSPORT CORP.	
7	APBW	5N PLAINFIELD MARKETING INC	

- Steps 2: - Select the business unit, select the customers, and select the sales specialist, select the product brand, line and category.



Assign Sales Specialist

Add Details

Business Unit* Select business unit

Customer* Select Customer

Sales Specialist* Select Sales Specialist

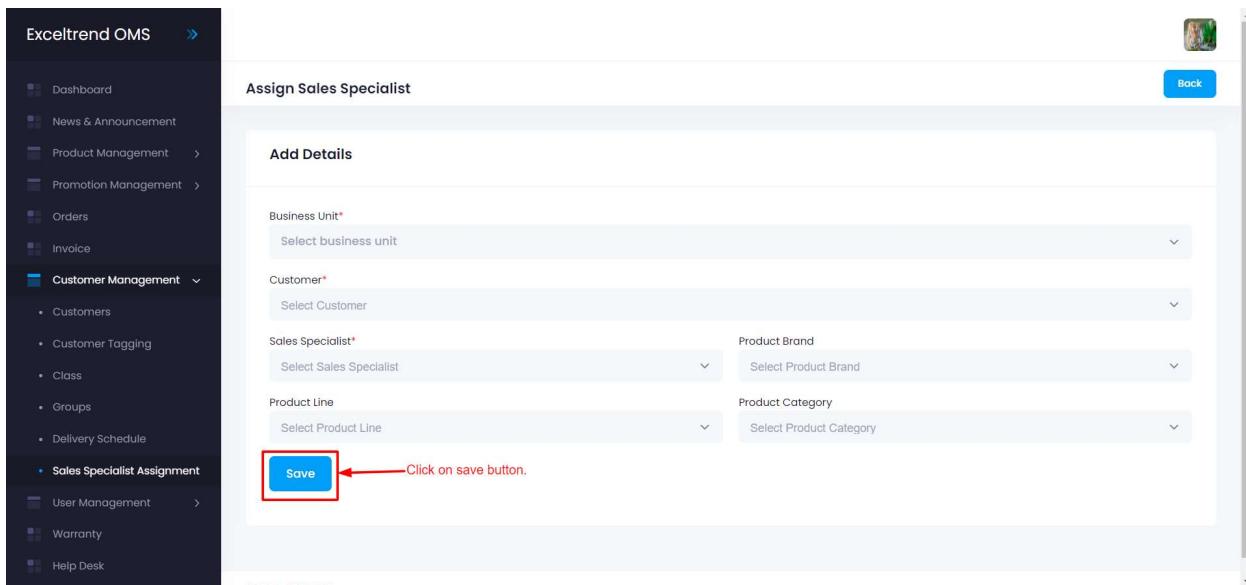
Product Brand Select Product Brand

Product Line Select Product Line

Product Category Select Product Category

Save

- Steps 3: - Click on save button.



Assign Sales Specialist

Add Details

Business Unit* Select business unit

Customer* Select Customer

Sales Specialist* Select Sales Specialist

Product Brand Select Product Brand

Product Line Select Product Line

Product Category Select Product Category

Save

Click on save button.

- Steps 4: - Created sales specialist assignment is display in listing page.

Customers Sales Specialist

No.	Business Unit	Customer	Action
1	APBW	A.H. SHOPPER'S MART	
2	APBW	A.G. COMBE T/S	
3	APBW	A.C. LIWANAG GRAVEL & SAND	
4	APBW	BPLY TIRE TRADING	
5	APBW	7J AUTOWORX SERVICE CENTER	
6	APBW	5SZAI DEN TRANSPORT CORP.	
7	APBW	5N PLAINFIELD MARKETING INC	

- Steps: - How to edit the sales specialist assignment.
 - Steps: - 1 Click on edit icon.

Customers Sales Specialist

No.	Business Unit	Customer	Action
1	APBW	A.H. SHOPPER'S MART	
2	APBW	A.G. COMBE T/S	
3	APBW	A.C. LIWANAG GRAVEL & SAND	
4	APBW	BPLY TIRE TRADING	
5	APBW	7J AUTOWORX SERVICE CENTER	
6	APBW	5SZAI DEN TRANSPORT CORP.	
7	APBW	5N PLAINFIELD MARKETING INC	

- Steps: - 2 Update the data.

Assign Sales Specialist

Update Details

Business Unit*
APBW

Customer*
A.G. COMBE T/S (Code: C01908, Email: c01908-1@mailinator.com)

Sales Specialist*
ALBERT OPENA

Product Brand
CST CST-MCT DELKOR FLAPS & TUBES

Product Line
Select Product Line

Product Category
ATV BANANA BATTERY FLAGSHIP FLAPS

Update

- Steps: - 3 Click on Update button.

Assign Sales Specialist

Update Details

Business Unit*
APBW

Customer*
A.G. COMBE T/S (Code: C01908, Email: c01908-1@mailinator.com)

Sales Specialist*
ALBERT OPENA

Product Brand
CST CST-MCT DELKOR FLAPS & TUBES

Product Line
Select Product Line

Product Category
ATV BANANA BATTERY FLAGSHIP FLAPS

Update ← Click on Update button

- Steps: - How to view the sales specialist assignment.
- Steps 1: - Click eye icon.

Customers Sales Specialist

No.	Business Unit	Customer	Action
1	APBW	A.H. SHOPPER'S MART	
2	APBW	A.G. COMBE T/S	
3	APBW	A.C. LIWANAG GRAVEL & SAND	
4	APBW	BPLY TIRE TRADING	
5	APBW	7J AUTOWORX SERVICE CENTER	
6	APBW	5SZAI DEN TRANSPORT CORP.	
7	APBW	5N PLAINFIELD MARKETING INC	

- Steps 2: - All details show in details page.

Customer : A.H. SHOPPER'S MART

Sales Specialist

- ALBERT OPENA
- ALBERT OPENA
- ALBERT OPENA

Product Brand

- CST
- CST-MCT
- DELKOR
- FLAPS & TUBES

Product Line

Product Category

- ATV
- BANANA
- BATTERY
- FLAGSHIP
- FLAPS

- Steps: - How to delete the sales specialist assignment.
 - Steps 1: - Click on trash icon and appear pop-up model.

The screenshot shows the 'Customer Sales Specialist' page within the Exceltrend OMS system. On the left is a dark sidebar with various menu items. The main area has a header 'Customers Sales Specialist' with buttons for 'Upload Assignment' and 'New Assignment'. Below is a table with columns: No., Business Unit, Customer, and Action. The 'Action' column contains icons for edit, delete, and view. A red arrow points to the delete icon in the first row. The table data is as follows:

No.	Business Unit	Customer	Action
1	APBW	A.H. SHOPPER'S MART	
2	APBW	A.G. COMBE T/S	
3	APBW	A.C. LIWANAG GRAVEL & SAND	
4	APBW	BPLY TIRE TRADING	
5	APBW	7J AUTOWORX SERVICE CENTER	
6	APBW	5SZAI DEN TRANSPORT CORP.	
7	APBW	5N PLAINFIELD MARKETING INC	

- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.

The screenshot shows the same 'Customer Sales Specialist' page after a row has been selected. A modal dialog box is centered over the table, containing a large exclamation mark icon and the text 'Are you sure?'. Below it, a smaller message says 'Once deleted, you will not be able to recover this record!'. At the bottom are two buttons: 'Yes, delete it!' (highlighted with a red box) and 'Cancel'. A red arrow points to the 'Yes, delete it!' button. The table data is identical to the previous screenshot.

- Steps: - How to upload assignment.
- Steps 1: - Click on upload assignment button.

The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar menu with various modules like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), Sales Specialist Assignment (selected), User Management, Warranty, and Help Desk. The main content area is titled 'Customers Sales Specialist'. At the top right, there are buttons for 'Upload Assignment' (highlighted with a red box and arrow), 'New Assignment', and user profile. Below these are search and filter options ('Search here...', 'Select business unit', 'Search', 'Clear'). A table lists 7 customers with columns for No., Business Unit, Customer, and Action (with edit, delete, and view icons). The 'Sales Specialist Assignment' module is also highlighted in the sidebar.

- Steps 2: - Upload the excel file.

The screenshot shows the 'Upload Sales Specialist Assignment' page. It has a similar sidebar to the previous page. The main area is titled 'Upload Sales Specialist Assignment'. It features an 'Upload Excel*' input field with a 'Choose File' button and a message 'No file chosen'. There is also a 'Sample Excel' link and a 'Save' button. The 'Sales Specialist Assignment' module is highlighted in the sidebar.

- Steps 3: - Click on save button.

The screenshot shows the Exceltrend OMS software interface. On the left, there is a dark sidebar with various menu items: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (which is currently selected), Customers, Customer Tagging, Class, Groups, Delivery Schedule, Sales Specialist Assignment (which is also selected), User Management, Warranty, and Help Desk. At the bottom of the sidebar, it says '2022 © B2B CRM'. The main content area is titled 'Upload Sales Specialist Assignment'. It has a 'Upload Excel*' field with a 'Choose File' button and a message 'No file chosen'. There is also a 'Sample Excel' button. A red box highlights the 'Save' button at the bottom left of the form, with a red arrow pointing to it and the text 'Click on save button' written next to it.

7. User Management Module: -

- There are six sub modules in this module and all modules explain in details one by one

7.1. User

- Admin can create, edit, update and delete the user.
- Admin can filter through filter the data.
- Admin can use the different-different filter and filter the data.
- Only Admin can sync the sales specialist data.
- **Video Link:** - <https://www.screencast.com/t/YVfrbrv0DC>
 - **Steps:** - How to create a new user.
 - Steps 1: - Click on create button.

The screenshot shows the 'User' management page in the Exceltrend OMS system. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, and User Management (which is currently selected). Under User Management, there are sub-options for Users, Roles, Departments, Territories, Territory Assignment, Organization Chart, Warranty, and Help Desk. The main area is titled 'User' and contains a table with columns: No., Role, First Name, Last Name, Email, Status, and Action. There are 7 rows of data. At the top right of the table is a blue 'Create' button with a red arrow pointing to it, indicating where to click to add a new user.

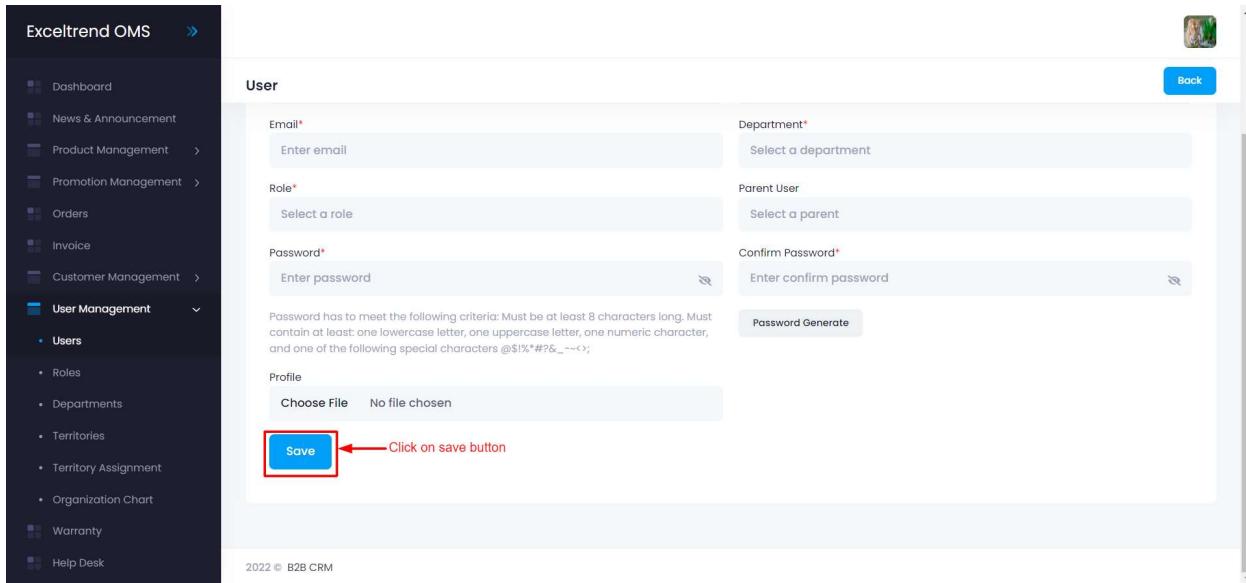
- Steps 2: - Enter the first and last name, enter email address, select the department, select role, select parent user, enter password and confirm password or click on password generate button, and upload the profile image.

The screenshot shows the 'Add Details' form for creating a new user. The form is divided into several sections:

- First Name***: Input field with placeholder 'Enter first name'.
- Last Name***: Input field with placeholder 'Enter last name'.
- Email***: Input field with placeholder 'Enter email'.
- Department***: Input field with placeholder 'Select a department'.
- Role***: Input field with placeholder 'Select a role'.
- Parent User**: Input field with placeholder 'Select a parent'.
- Password***: Input field with placeholder 'Enter password' and a 'Password Generate' button below it.
- Confirm Password***: Input field with placeholder 'Enter confirm password'.
- Profile**: A file upload section with 'Choose File' and 'No file chosen'.
- Save**: A blue 'Save' button at the bottom.

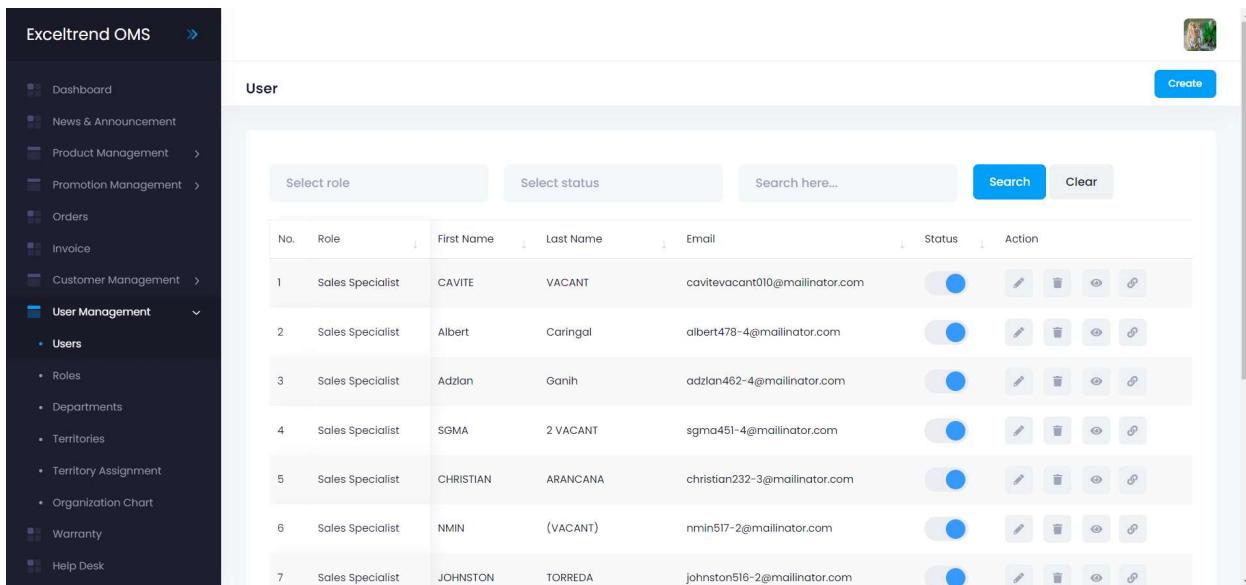
 The sidebar on the left remains the same as the previous screenshot, showing the User Management section is still selected.

▪ Steps 3: - Click on save button.



The screenshot shows the 'User' creation form in the Exceltrend OMS system. The left sidebar shows the navigation menu with 'User Management' selected. The main form has fields for Email*, Department*, Role*, Password*, and Profile (Choose File). A note below the password field specifies criteria: Must be at least 8 characters long, must contain at least one lowercase letter, one uppercase letter, one numeric character, and one of the following special characters: @#\$%^&*(). The 'Save' button is highlighted with a red box and an arrow pointing to it.

▪ Steps 4: - Created user show in user listing page.



The screenshot shows the 'User' listing page in the Exceltrend OMS system. The left sidebar shows the navigation menu with 'User Management' selected. The main page displays a table of users with columns: No., Role, First Name, Last Name, Email, Status, and Action. There are 7 entries listed:

No.	Role	First Name	Last Name	Email	Status	Action			
1	Sales Specialist	CAVITE	VACANT	cavitevacant01@mailinator.com	<input checked="" type="checkbox"/>				
2	Sales Specialist	Albert	Caringal	albert478-4@mailinator.com	<input checked="" type="checkbox"/>				
3	Sales Specialist	Adzlan	Ganih	adzlan462-4@mailinator.com	<input checked="" type="checkbox"/>				
4	Sales Specialist	SGMA	2 VACANT	sgma451-4@mailinator.com	<input checked="" type="checkbox"/>				
5	Sales Specialist	CHRISTIAN	ARANCANA	christian232-3@mailinator.com	<input checked="" type="checkbox"/>				
6	Sales Specialist	NMIN	(VACANT)	nmin617-2@mailinator.com	<input checked="" type="checkbox"/>				
7	Sales Specialist	JOHNSTON	TORREDA	johnston516-2@mailinator.com	<input checked="" type="checkbox"/>				

- Steps: - How to edit the user.
- Steps 1: - Click on edit icon.

The screenshot shows the 'User' management page within the Exceltrend OMS system. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, and User Management (which is currently selected). The main area has a light gray header with 'User' and a 'Create' button. Below is a search bar with 'Select role', 'Select status', and 'Search here...' fields, along with 'Search' and 'Clear' buttons. A table lists 7 users with columns for No., Role, First Name, Last Name, Email, Status, and Action. The 'Action' column contains icons for edit, delete, view, and more. The first 'Edit' icon is highlighted with a red box and a red arrow pointing to it.

No.	Role	First Name	Last Name	Email	Status	Action
1	Sales Specialist	CAVITE	VACANT	cavitevacant010@mailinator.com	<input checked="" type="checkbox"/>	
2	Sales Specialist	Albert	Caringal	albert478-4@mailinator.com	<input checked="" type="checkbox"/>	
3	Sales Specialist	Adzlan	Ganih	adzlan462-4@mailinator.com	<input checked="" type="checkbox"/>	
4	Sales Specialist	SGMA	2 VACANT	sgma451-4@mailinator.com	<input checked="" type="checkbox"/>	
5	Sales Specialist	CHRISTIAN	ARANCANA	christian232-3@mailinator.com	<input checked="" type="checkbox"/>	
6	Sales Specialist	NMIN	(VACANT)	nmin517-2@mailinator.com	<input checked="" type="checkbox"/>	
7	Sales Specialist	JOHNSTON	TORREDA	johnston516-2@mailinator.com	<input checked="" type="checkbox"/>	

- Steps 2: - Update the data.

The screenshot shows the 'Update Details' form for a user. The sidebar on the left is identical to the previous screenshot. The main area has a light gray header with 'User' and a 'Back' button. The form is divided into sections: 'Update Details' and 'Update Password'. In 'Update Details', there are fields for First Name*, Last Name*, Email*, Department*, Role*, and Profile (with a 'Choose File' button). Below these is a large blue 'Update' button. In 'Update Password', there are fields for New Password* and Confirm Password*. Below these is a note about password criteria and a 'Password Generate' button. At the bottom of the form is another blue 'Update' button.

- Steps 3: - Click on update button.

Exceltrend OMS

User

Update Details

First Name*	Last Name*
CAVITE	VACANT
Email*	Department*
cavitevacant010@mailinator.com	Sales
Role*	Parent User
Sales Specialist	Select Parent User
Profile	
Choose File No file chosen	
Update	

Click on update button

Update Password

- Steps: - How to view the user details.

- Steps 1: - Click on eye icon.

Exceltrend OMS

User

No.	Role	First Name	Last Name	Email	Status	Action
1	Sales Specialist	CAVITE	VACANT	cavitevacant010@mailinator.com	<input checked="" type="checkbox"/>	Edit Delete Eye Print
2	Sales Specialist	Albert	Caringal	albert478-4@mailinator.com	<input checked="" type="checkbox"/>	Edit Delete Eye Print
3	Sales Specialist	Adzlan	Ganih	adzlan462-4@mailinator.com	<input checked="" type="checkbox"/>	Edit Delete Eye Print
4	Sales Specialist	SGMA	2 VACANT	sgma451-4@mailinator.com	<input checked="" type="checkbox"/>	Edit Delete Eye Print
5	Sales Specialist	CHRISTIAN	ARANCANA	christian232-3@mailinator.com	<input checked="" type="checkbox"/>	Edit Delete Eye Print
6	Sales Specialist	NMIN	(VACANT)	nmin517-2@mailinator.com	<input checked="" type="checkbox"/>	Edit Delete Eye Print
7	Sales Specialist	JOHNSTON	TORREDA	johnston516-2@mailinator.com	<input checked="" type="checkbox"/>	Edit Delete Eye Print

Click on eye icon

- Steps 2: - All details are display in user view page.

The screenshot shows the Exceltrend OMS application's User Management module. On the left is a dark sidebar menu with various options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (selected), Warranty, and Help Desk. The User Management section is expanded, showing sub-options: Users, Roles, Departments, Territories, Territory Assignment, Organization Chart, Sales Employee Code, and Created Date. The main content area is titled 'User' and shows a 'View Details' section for a user named 'CAVITE VACANT'. The details include First Name: CAVITE, Last Name: VACANT, Email: cavitevacant010@mailinator.com, Department Name: Sales, Role Name: Sales Specialist, Parent User Name: (empty), Password: N5+cEN_p, Sales Employee Code: 487, Created Date: Feb 18, 2022, and Status: Active. Below this is a 'Hierarchy View' section which displays a grid with a single node labeled 'Sales Specialist' under 'CAVITE VACANT'. At the bottom of the main content area, there is a footer note: '2022 © B2B CRM'.

- **Steps: - How to active and inactive the user.**

- Steps 1: - Click on Active status and appear to one pop-up model.

The screenshot shows the 'User' management page within the Exceltrend OMS system. The left sidebar includes options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, and User Management (with sub-options: Users, Roles, Departments, Territories, Territory Assignment, Organization Chart). The main area displays a table of users with columns: No., Role, First Name, Last Name, Email, Status, and Action. The 'Status' column for user #1 (Sales Specialist, CAVITE) has a blue circle icon, which is highlighted with a red box. The 'Action' column contains icons for edit, delete, and other operations.

- Steps 2: - Pop-up model appear and show message “Are you sure want to change status?” and you click on “Yes, change it” button the news and announcement status change.

This screenshot shows the same 'User' management page as above, but with a modal dialog box overlaid. The dialog features a large orange exclamation mark icon at the top, followed by the text 'Are you sure want to change status?'. At the bottom, there are two buttons: 'Yes, change it!' (highlighted with a red box) and 'Cancel'. Below the buttons, a note says 'click on "Yes, change it!" button'. The background table of users is partially visible behind the dialog.

■ Steps 3: - Update status show in listing page.

The screenshot shows the 'User' management page within the Exceltrend OMS system. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (selected), Roles, Departments, Territories, Territory Assignment, Organization Chart, Warranty, and Help Desk. The main area is titled 'User' and contains a table with columns: No., Role, First Name, Last Name, Email, Status, and Action. The 'Status' column includes a blue circular icon and a trash icon. A red box highlights the trash icon for the first user. The table has 7 rows, each representing a user with a unique email address ending in @mailinator.com.

No.	Role	First Name	Last Name	Email	Status	Action
1	Sales Specialist	CAVITE	VACANT	cavitevacant010@mailinator.com		
2	Sales Specialist	Albert	Caringal	albert478-4@mailinator.com		
3	Sales Specialist	Adzlan	Ganih	adzlan462-4@mailinator.com		
4	Sales Specialist	SGMA	2 VACANT	sgma451-4@mailinator.com		
5	Sales Specialist	CHRISTIAN	ARANCANA	christian232-3@mailinator.com		
6	Sales Specialist	NMIN	(VACANT)	nmin517-2@mailinator.com		
7	Sales Specialist	JOHNSTON	TORREDA	johnston516-2@mailinator.com		

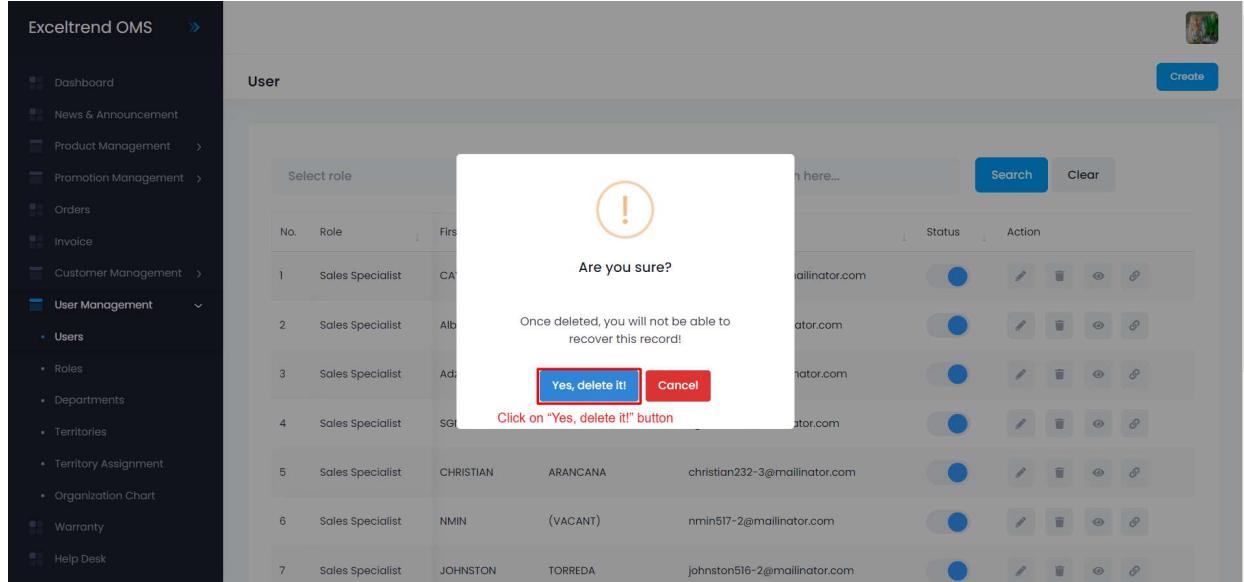
○ Steps: - How to delete the user.

■ Steps 1: - Click on trash icon and appear pop-up model.

This screenshot is similar to the previous one but includes a red arrow pointing to the trash icon in the action column of the first user's row. The arrow is labeled 'Click on trash icon'. This visual cue guides the user to perform the initial step of initiating a delete operation.

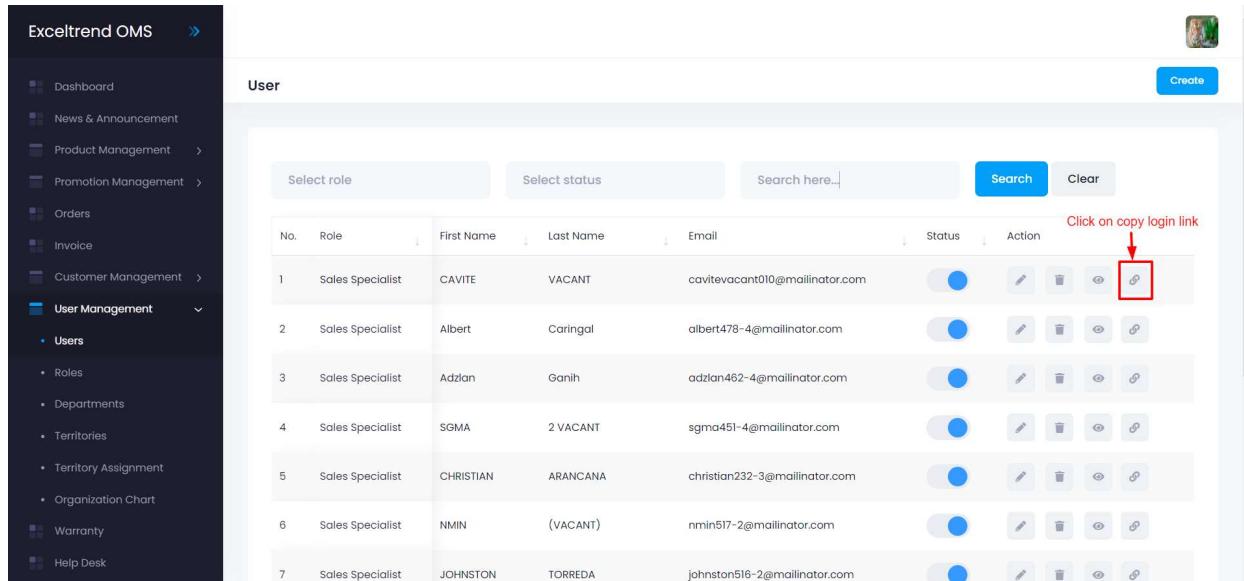
No.	Role	First Name	Last Name	Email	Status	Action
1	Sales Specialist	CAVITE	VACANT	cavitevacant010@mailinator.com		
2	Sales Specialist	Albert	Caringal	albert478-4@mailinator.com		
3	Sales Specialist	Adzlan	Ganih	adzlan462-4@mailinator.com		
4	Sales Specialist	SGMA	2 VACANT	sgma451-4@mailinator.com		
5	Sales Specialist	CHRISTIAN	ARANCANA	christian232-3@mailinator.com		
6	Sales Specialist	NMIN	(VACANT)	nmin517-2@mailinator.com		
7	Sales Specialist	JOHNSTON	TORREDA	johnston516-2@mailinator.com		

■ Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.

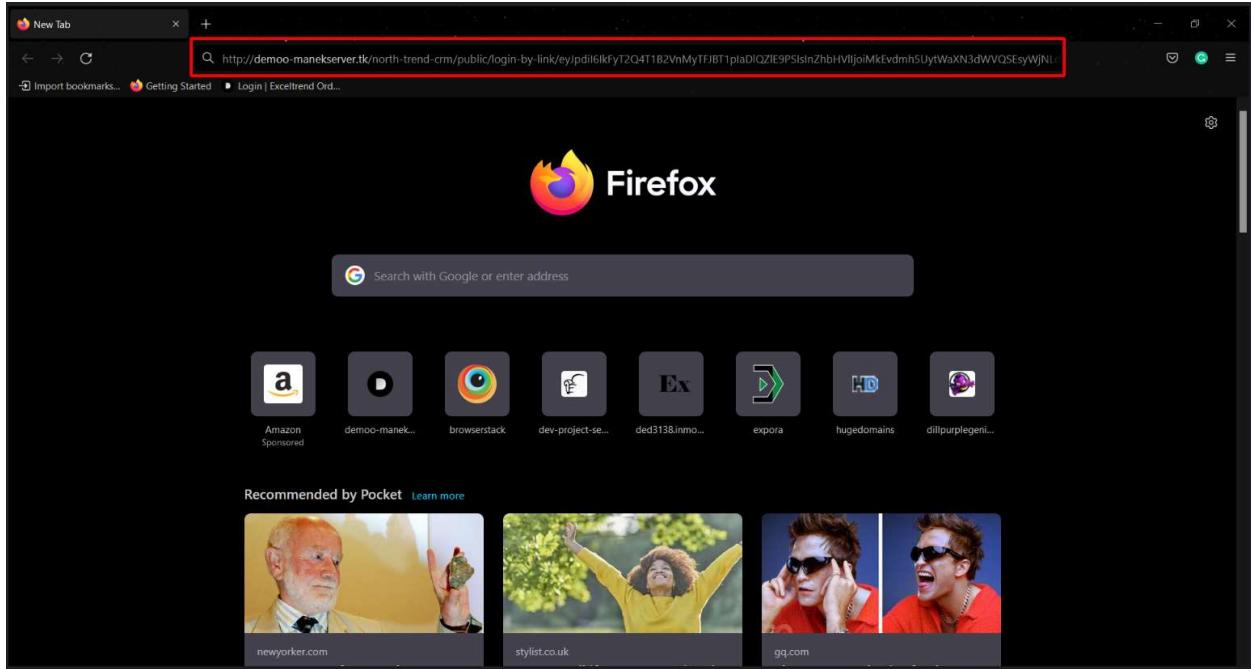


- Steps: - How to direct login for particular user.

- Steps 1: - Click on copy login link.



- Steps 2: - Open any web-browser and paste the URL in browser after the press enter button.



7.2. Roles

- Admin can create, edit, and update the role.
- Admin can search the data using the search box.
- Admin can use the different-different filter and filter the data.
- **Video Link:** - <https://www.screencast.com/t/twji0H5t>
- **Steps:** - How to create a new role
 - Steps 1: - Click on create a button.

The screenshot shows the 'Role' management page within the Exceltrend OMS system. The left sidebar includes categories like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (with sub-options: Users, Roles, Departments, Territories, Territory Assignment, Organization Chart), Warranty, and Help Desk. The main content area displays a table of existing roles:

No.	Name	Parent	Access	Action
1	Sales_Tesr	Sales Specialist	All Module Access	
2	Customer	-	Custom Module Access	
3	Support	-	All Module Access	-
4	Sales Specialist	-	Custom Module Access	

Below the table, it says 'Showing 1 to 4 of 4 records'. At the top right of the page, there are 'Role Chart' and 'Create' buttons, with the 'Create' button highlighted by a red box and an arrow pointing to it with the text 'Click on create a button'.

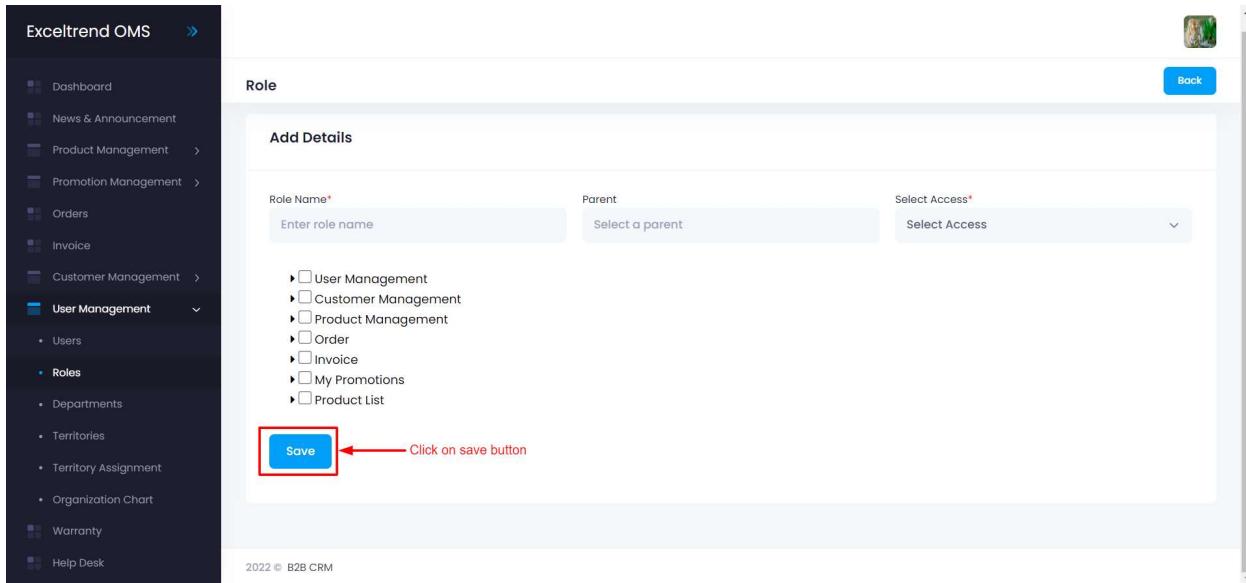
- Steps 2: - Enter the Role name, select the parent role, and select access type.

The screenshot shows the 'Add Details' form for creating a new role. The left sidebar is identical to the previous screenshot. The main form has fields for 'Role Name*', 'Parent', and 'Select Access*'. The 'Role Name*' field contains 'Enter role name', the 'Parent' dropdown is set to 'Select a parent', and the 'Select Access*' dropdown is set to 'Select Access'. Below these fields is a list of checkboxes for selecting access types, including 'User Management', 'Customer Management', 'Product Management', 'Order', 'Invoice', 'My Promotions', and 'Product List'. At the bottom of the form is a 'Save' button.

- Steps 3: - Select the access type wise give permission for role.

The screenshot shows the 'Role' management screen in the Exceltrend OMS system. On the left, there is a dark sidebar menu with various navigation options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (selected), Users, Roles, Departments, Territories, Territory Assignment, Organization Chart, Warranty, and Help Desk. The main content area has a header 'Role' with a 'Back' button. Below it is a form titled 'Add Details'. The 'Role Name*' field contains 'Enter role name'. The 'Parent' field is labeled 'Select a parent' and has a dropdown menu. The 'Select Access*' field is a dropdown menu currently set to 'Select Access'. A large red box highlights the 'Select Access' dropdown and the entire list of permissions below it. The permissions list includes categories for User Management, User, Department, Customer Management, Class, Customer, Customer Group, Product Management, Product, Product Brand, Order, Invoice, My Promotions, and Product List, each with sub-options for Add, Edit, View, and Delete. At the bottom of the form is a blue 'Save' button. The footer of the page says '2022 © B2B CRM'.

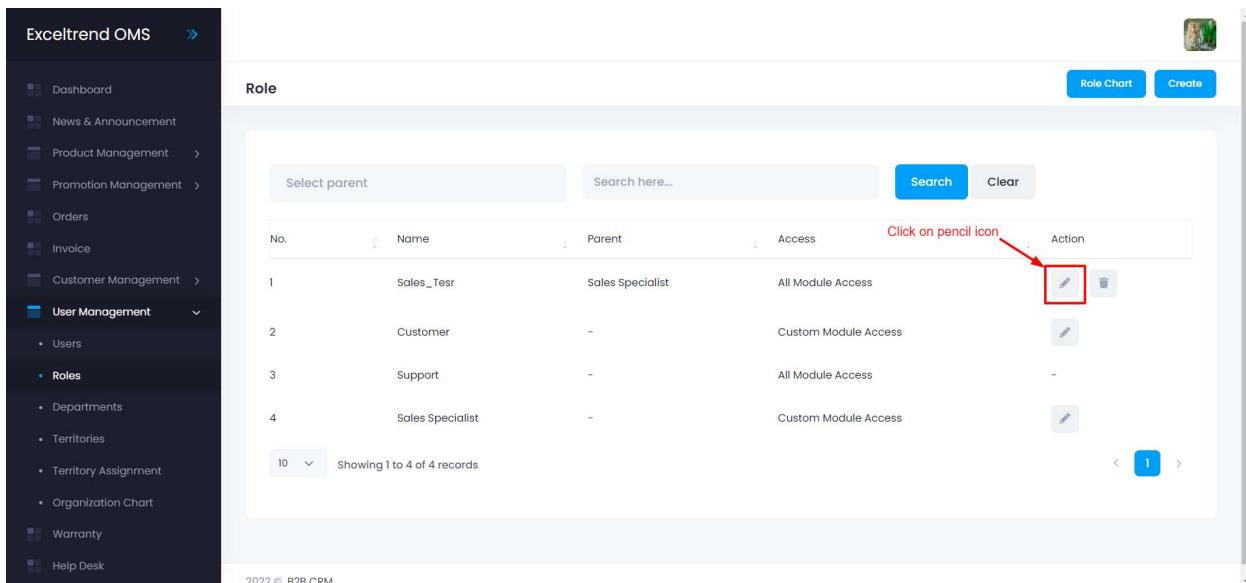
■ Steps 4: - Click on save button.



The screenshot shows the 'Role' add details page. On the left is a dark sidebar with navigation items like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (selected), and Help Desk. The main area has tabs for 'Role' and 'Add Details'. Under 'Add Details', there are fields for 'Role Name*' (with placeholder 'Enter role name'), 'Parent' (with placeholder 'Select a parent'), and 'Select Access*' (with placeholder 'Select Access'). Below these are checkboxes for various access levels. At the bottom is a blue 'Save' button, which is highlighted with a red box and a red arrow pointing to it from the text 'Click on save button'.

○ Steps: - How edit the role.

■ Steps 1: - Click on pencil icon.



The screenshot shows the 'Role' list page. The sidebar is identical to the previous screenshot. The main area displays a table of roles with columns: No., Name, Parent, Access, and Action. The 'Action' column contains icons for edit (pencil) and delete. The first row's edit icon is highlighted with a red box and a red arrow pointing to it from the text 'Click on pencil icon'.

No.	Name	Parent	Access	Action
1	Sales_Tesr	Sales Specialist	All Module Access	 
2	Customer	-	Custom Module Access	 
3	Support	-	All Module Access	 
4	Sales Specialist	-	Custom Module Access	 

■ Steps 2: - Update the data.

The screenshot shows the 'Role' management screen in the Exceltrend OMS system. The left sidebar lists various modules: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (selected), Users, Roles, Departments, Territories, Territory Assignment, Organization Chart, Warranty, and Help Desk. The main panel is titled 'Update Details' and shows the following fields:

- Role Name***: Sales_Testr
- Parent**: Sales Specialist
- Select Access***: All Menu Access

The central area displays a hierarchical list of permissions with checkboxes:

- User Management
 - Role
 - Add
 - Edit
 - View
 - Delete
 - User
 - Add
 - Edit
 - View
 - Delete
 - Department
 - Add
 - Edit
 - View
 - Delete
- Customer Management
 - Class
 - View
 - Customer
 - Add/Sync
 - View
 - Customer Group
 - Add/Sync
 - View
- Product Management
 - Product
 - Add/Sync
 - Edit
 - View
 - Product Brand
 - Add/Sync
 - View
- Order
 - Add/Sync
 - View
- Invoice
 - Add/Sync
 - View
- My Promotions
 - View
- Product List
 - View

A blue 'Update' button is located at the bottom of the form.

- Steps 3: - Click on update button.

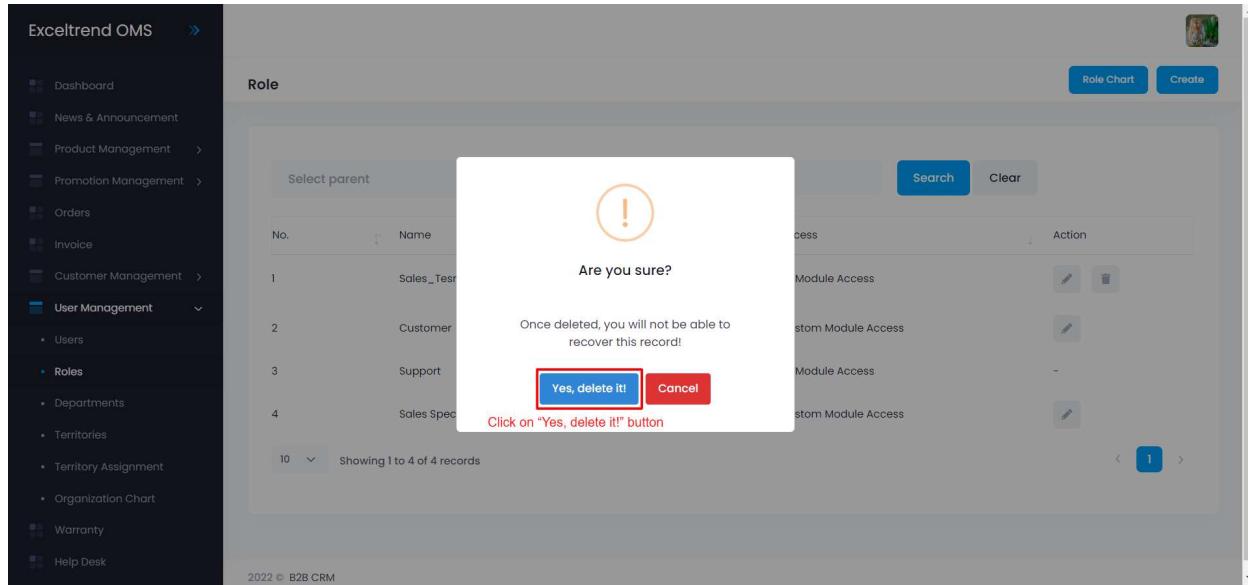
The screenshot shows the 'Role' management screen in the Exceltrend OMS system. On the left is a sidebar with navigation links like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (with sub-links for Users, Roles, Departments, Territories, Territory Assignment, Organization Chart), Warranty, and Help Desk. The main area is titled 'Role' and lists various permissions under 'Product Brand', 'Order', 'Invoice', 'My Promotions', and 'Product List'. A red arrow points to the 'Update' button at the bottom-left of the list, which is highlighted with a red box. The status bar at the bottom says '2022 © B2B CRM'.

- Steps: - How to delete the role.

- Steps 1: - Click on trash icon and appear pop-up model.

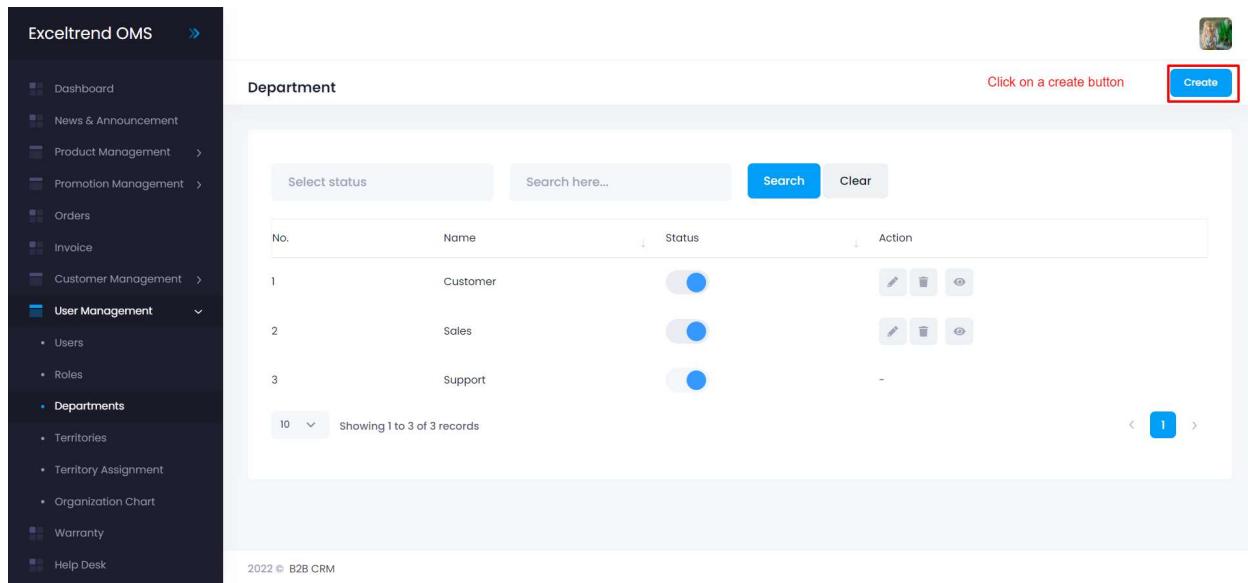
The screenshot shows the 'Role' management screen. The sidebar is identical to the previous one. The main area displays a table of roles with columns: No., Name, Parent, Access, and Action. The 'Action' column contains edit and delete icons. A red arrow points to the delete icon for the first row ('Sales_Tesr'), which is highlighted with a red box. The status bar at the bottom says '2022 © B2B CRM'.

- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.



7.3. Departments

- Admin can create, edit, update, view and delete the departments.
- Admin can search the data using the search box.
- Admin can use the different-different filter and filter the data.
- **Video Link:** - <https://www.screencast.com/t/ubRHUjFTH78>
- **Steps: - How to create a new department.**
 - Steps 1: - Click on a create button.



- Steps 2: - Enter the department name and select the role.

The screenshot shows the 'Department' add details page. On the left is a dark sidebar with various menu items. The main area has a form titled 'Add Details'. It includes a 'Department Name*' input field with placeholder text 'Enter department name', which is highlighted with a red box. Below it is a 'Roles' section with three checkboxes: 'Sales Specialist', 'Support', and 'Customer', each with a corresponding toggle switch. To the right is a vertical panel titled 'Add to Department ?' containing three more checkboxes, also with toggle switches, which is also highlighted with a red box. A blue 'Save' button is at the bottom of the form.

- Steps 3: - Click on save button.

This screenshot is identical to the previous one, showing the 'Department' add details page. The 'Department Name*' field and the 'Add to Department ?' panel are both highlighted with red boxes. A red arrow points to the blue 'Save' button at the bottom of the form, with the text 'Click on save button' written next to it.

- Steps: - How to edit the department.

- Steps 1: - Click on pencil icon.

Exceltrend OMS

Department

No.	Name	Status	Action
1	Customer	<input checked="" type="checkbox"/>	
2	Sales	<input checked="" type="checkbox"/>	
3	Support	<input checked="" type="checkbox"/>	

Showing 1 to 3 of 3 records

2022 © B2B CRM

- Steps 2: - Update the data.

Exceltrend OMS

Department

Update Details

Department Name*
Customer

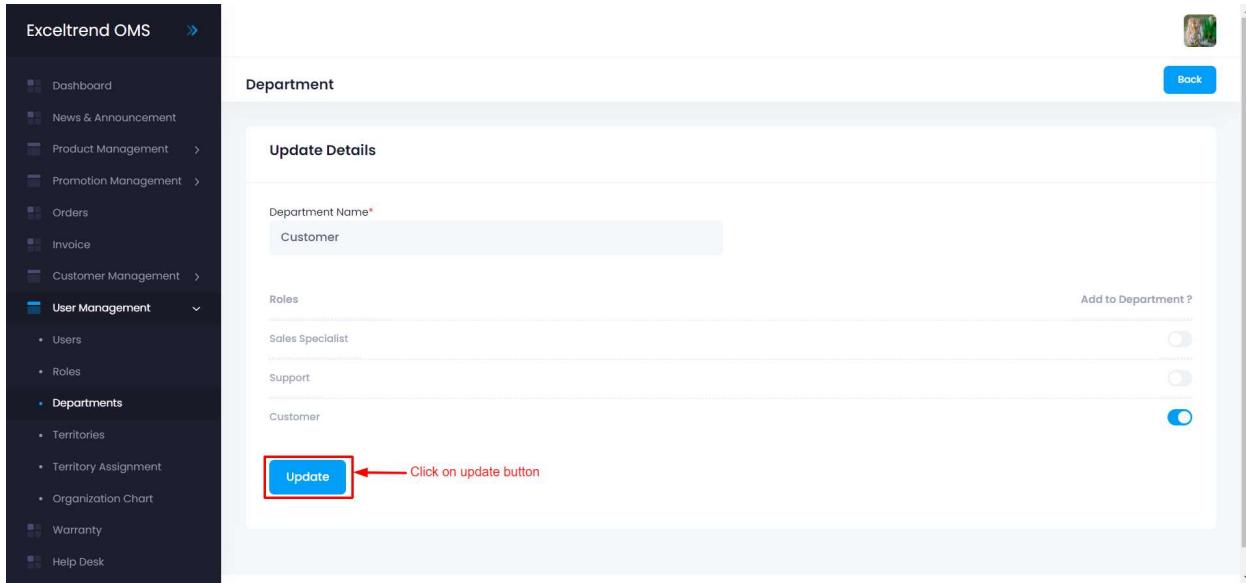
Roles

Sales Specialist
Support
Customer

Add to Department ?

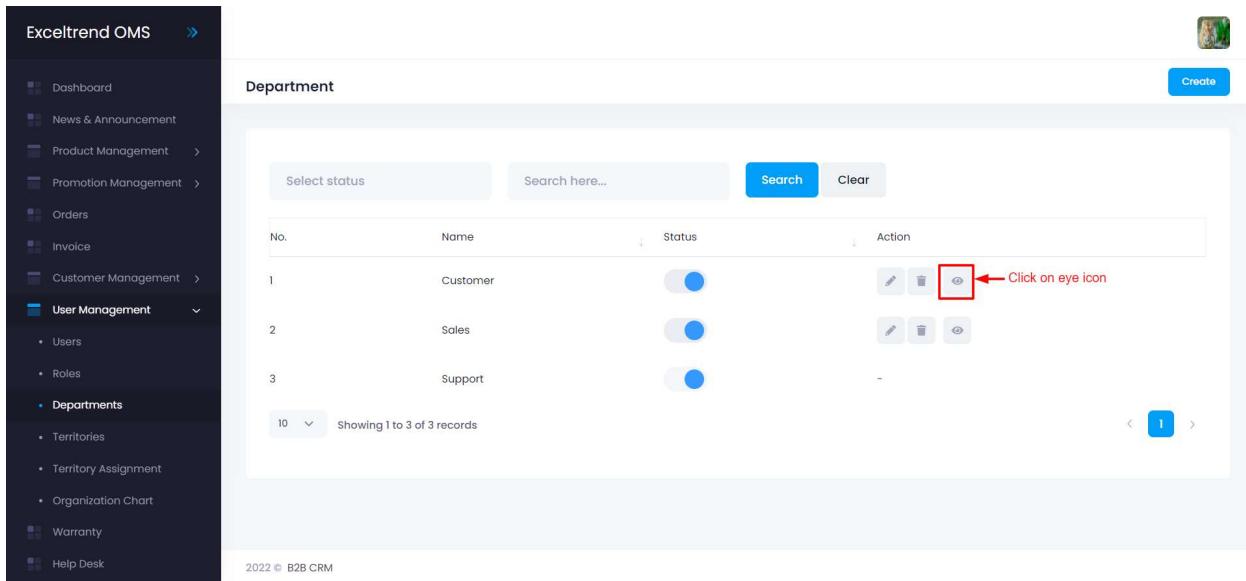
Update

- Steps 3: - Click on update button.



The screenshot shows the 'Department' update form. The 'Department Name*' field contains 'Customer'. Under the 'Roles' section, 'Sales Specialist' and 'Support' are listed with their status toggles off. 'Customer' is listed with its status toggle on. A red box highlights the 'Update' button at the bottom left.

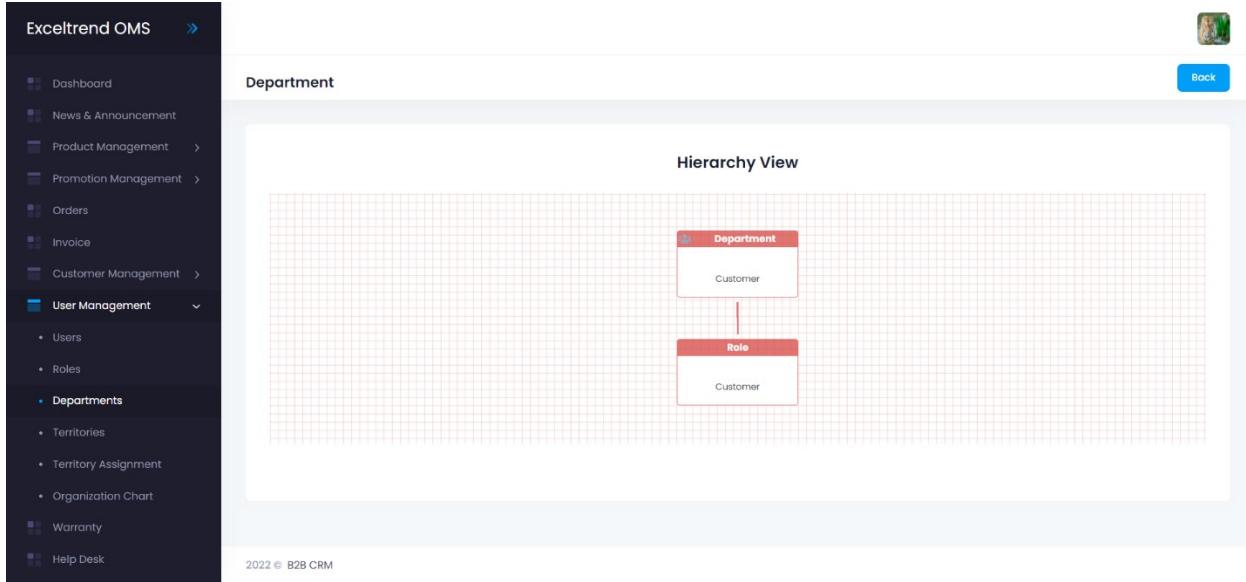
- Steps: - How to view the department.
 - Steps 1: - Click on eye icon.



The screenshot shows the 'Department' list page. It includes search and filter options ('Select status', 'Search here...', 'Search', 'Clear'). The table lists three records: Customer, Sales, and Support. The 'Customer' record is highlighted with a red box around its eye icon in the 'Action' column. The table footer shows 'Showing 1 to 3 of 3 records'.

No.	Name	Status	Action
1	Customer	<input checked="" type="checkbox"/>	Eye icon Edit icon Delete icon
2	Sales	<input checked="" type="checkbox"/>	Eye icon Edit icon Delete icon
3	Support	<input checked="" type="checkbox"/>	Eye icon Edit icon Delete icon

- Steps 2: - All details show in view page.

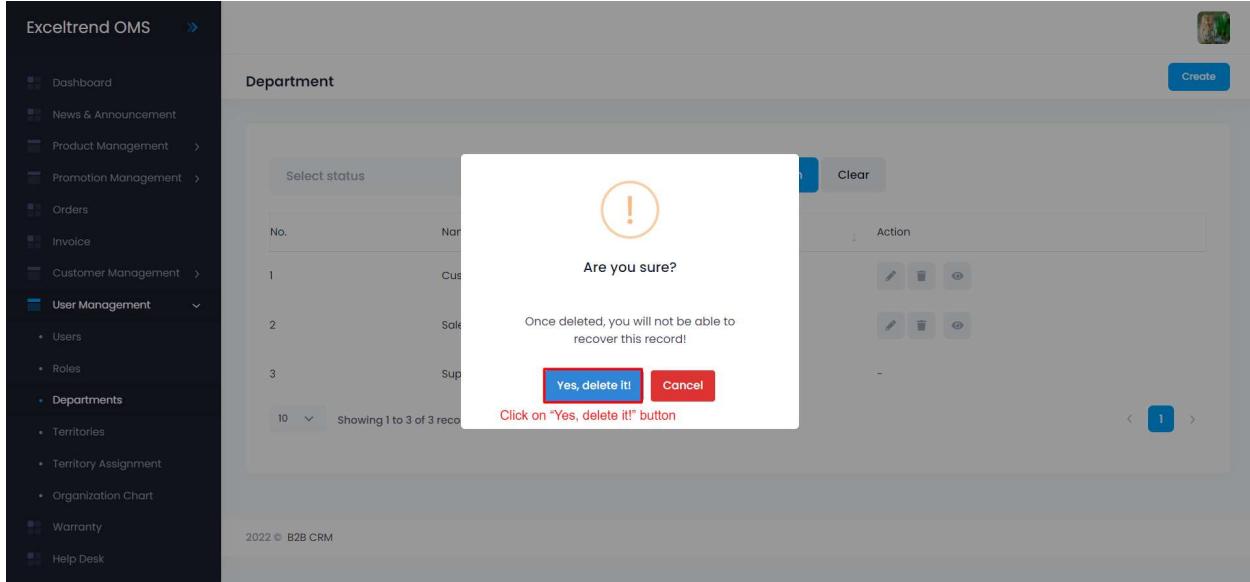


○ Steps: - How to delete the department.

- Steps 1: - Steps 1: - Click on trash icon and appear pop-up model.

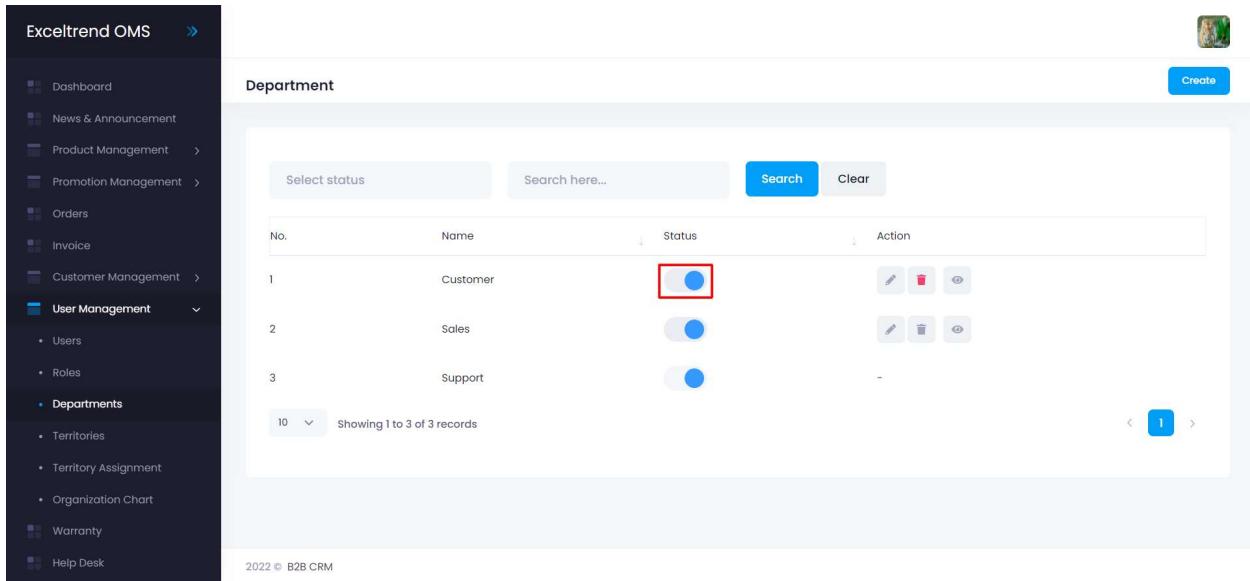
The screenshot shows the 'Department' list page. The sidebar is identical to the previous one. The main area has a search bar with 'Select status' and 'Search' buttons, and a 'Create' button in the top right. Below is a table with columns: No., Name, Status, and Action. The 'Action' column contains icons for edit, delete, and details. The 'Customer' row is highlighted with a red box around its 'Delete' icon, which is also highlighted with a red arrow. The table footer shows 'Showing 1 to 3 of 3 records'. The URL at the bottom is '2022 © B2B CRM'.

- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.

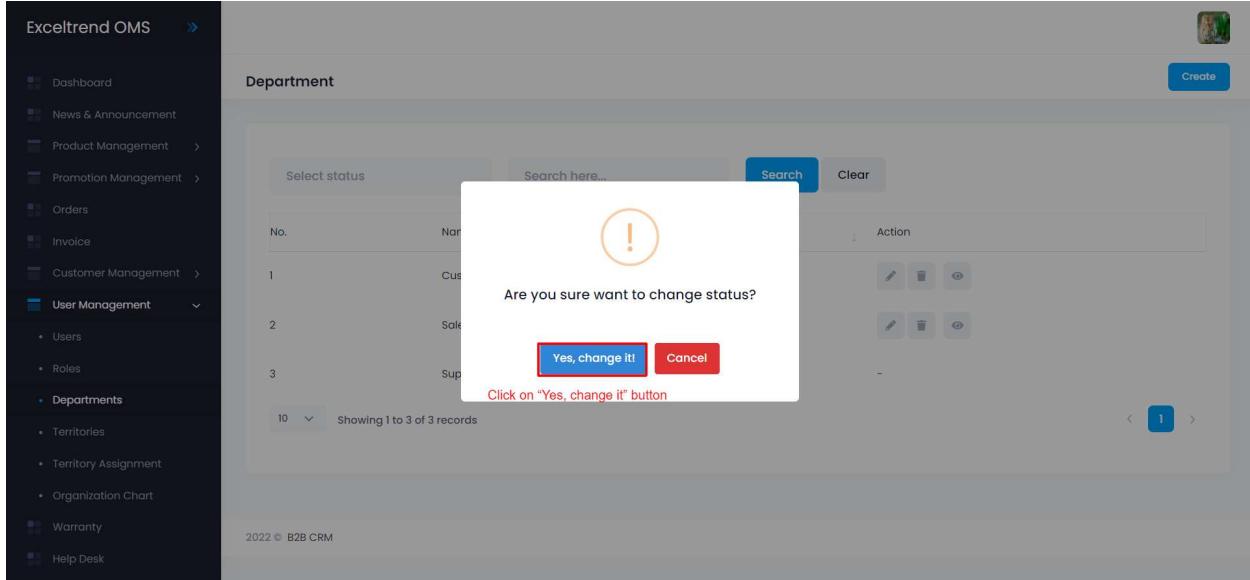


○ Steps: - How active and inactive the department.

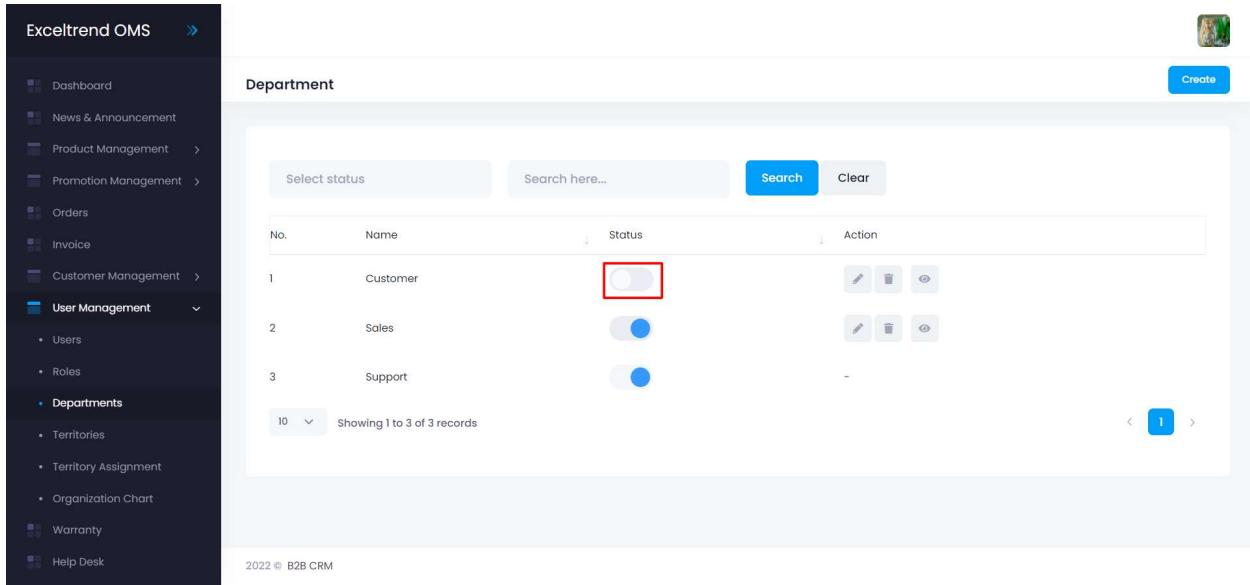
- Steps 1: - Click on Active status and appear to one pop-up model.



- Steps 2: - Pop-up model appear and show message “Are you sure want to change status?” and you click on “Yes, change it” button the news and announcement status change.



- Steps 3: - Update status show in listing page.



7.4. Territories

- Admin can sync the territories.
- Admin can search the territories using the search box.
- Admin can use the different-different filter and filter the data.
- **Video Link:** - <https://www.screencast.com/t/ipYCD2ITQd2>
- **Steps: - How sync the territories.**
 - Steps 1: - Click on sync territories and appear pop-up model.

The screenshot shows the 'Territories' page of the Exceltrend OMS system. On the left is a dark sidebar with various menu items. Under 'User Management', the 'Territories' option is selected. At the top right of the main content area is a blue button labeled 'Sync Territories'. A red box surrounds this button, and a red arrow points to it with the instruction 'Click on sync territories'.

No.	Name	Status
1	ORIENTAL MINDORO	Active
2	KALINGA	Active
3	IFUGAO	Active
4	NUEVA VIZCAYA	Active
5	BAGUIO	Active
6	OLONGAPO	Active
7	ILOILO PROVINCE	Active

- Steps 2: - Pop-up model appear and show message “Are you sure you want to sync territories?” and click on “Yes, do it” button that time loader should be load after the message displayed sync territories successfully.

The screenshot shows the same 'Territories' page as above, but with a modal dialog box overlaid. The dialog has a white background with a large orange exclamation mark icon at the top. The text inside reads: 'Are you sure want to sync Territories?' followed by a descriptive message: 'Syncing process will run in background and it may take some time to sync all Territories Data.' At the bottom of the dialog are two buttons: a blue 'Yes, do it!' button and a red 'Cancel' button. A red box surrounds the 'Yes, do it!' button, and a red arrow points to it with the instruction 'Click on "Yes, do it!" button'.

No.	Name	Status
1	ORIENTAL MINDORO	Active
2	KALINGA	Active
3	IFUGAO	Active
4	NUEVA VIZCAYA	Active
5	BAGUIO	Active
6	OLONGAPO	Active
7	ILOILO PROVINCE	Active

7.5. Territories Assignment: -

- Admin can create, edit, update, and delete the data.
- Admin can search the data using search bar.
- **Video Link:** - <https://www.screencast.com/t/DV4M96CwV>
- **Steps: - How to create a new assignment.**
 - Steps 1: - Click on a new assignment button.

The screenshot shows the 'Territory Sales Specialist' page. On the left is a dark sidebar with navigation links. The main area has a header 'Territory Sales Specialist'. Below it is a search bar with 'Search here...', 'Search', and 'Clear' buttons. A table lists two sales specialists: 'Aloha Lumanlan' and 'ADZLAN GANIH', each with their assigned territories. At the bottom, it says 'Showing 1 to 2 of 2 records'. In the top right corner of the main area, there is a blue button labeled 'New Assignment' with a red arrow pointing to it.

- Steps 2: - Select the sales specialist and select territory.

The screenshot shows the 'Assign Sales Specialist' page. It has a header 'Assign Sales Specialist' and a 'Back' button. Below is a section titled 'Add Details' with two dropdown menus: 'Sales Specialist*' and 'Territory*'. Both dropdowns have a placeholder 'Select Sales Specialist' and 'Select territory'. At the bottom is a blue 'Save' button.

- Steps 3: - Click on save button.

Assign Sales Specialist

Add Details

Sales Specialist* Select Sales Specialist

Territory* Select territory

Save Click on save button

Territory Sales Specialist

No.	Sales Specialist	Territory	Action
1	Aloha Lumanlan	BAYAWAN CITY AKLAN AGUSAN DEL SUR AGUSAN DEL NORTE ABRA	
2	ADZLAN GANIH	AGUSAN DEL SUR AGUSAN DEL NORTE ABRA	

Search here... Search Clear

Showing 1 to 2 of 2 records

- Steps 2: - Update the data.

Assign Sales Specialist

Update Details

Sales Specialist* Aloha Lumanlan (Code: 452)

Territory* BAYAWAN CITY, AKLAN, AGUSAN DEL SUR, AGUSAN DEL NORTE, ABRA

Update

- Steps 3: - Click on update button.

Assign Sales Specialist

Update Details

Sales Specialist* Aloha Lumanlan (Code: 452)

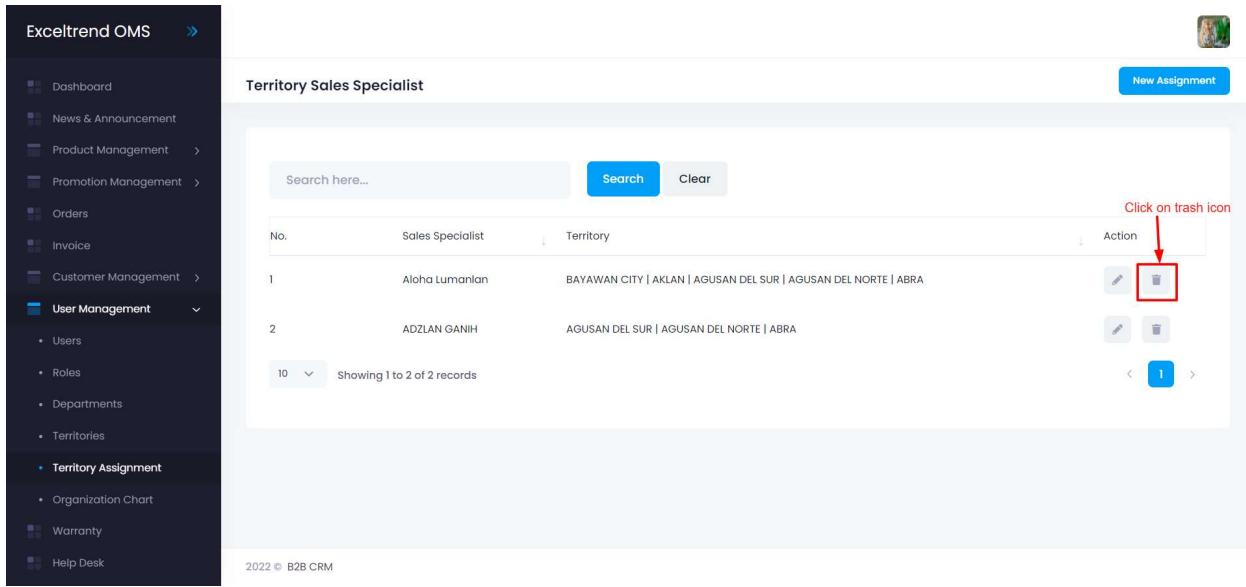
Territory* BAYAWAN CITY, AKLAN, AGUSAN DEL SUR, AGUSAN DEL NORTE, ABRA

Update

Click on update button

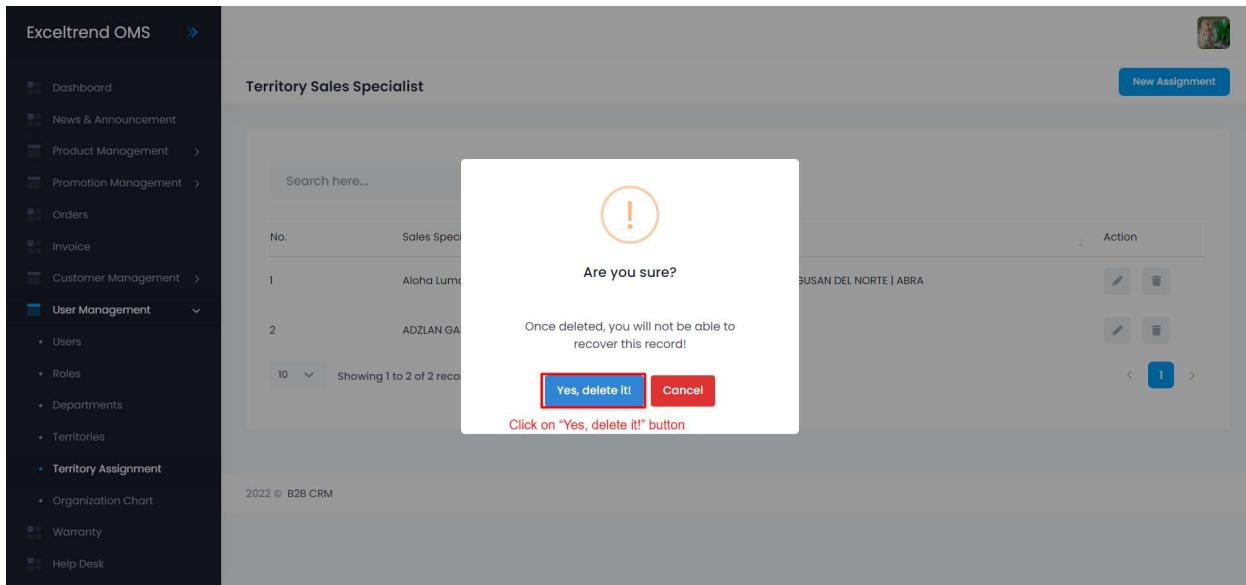
- Steps: - How to delete the assignment.

- Steps 1: - Click on trash icon and appear pop-up model.



The screenshot shows the 'Territory Sales Specialist' page within the Exceltrend OMS system. The left sidebar contains a navigation menu with categories like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (with sub-options: Users, Roles, Departments, Territories, Territory Assignment, Organization Chart), Warranty, and Help Desk. The main content area is titled 'Territory Sales Specialist' and displays a table with two records. The columns are labeled 'No.', 'Sales Specialist', and 'Territory'. Record 1: Aloha Lumanlan, BAYAWAN CITY | AKLAN | AGUSAN DEL SUR | AGUSAN DEL NORTE | ABRA. Record 2: ADZLAN GANIH, AGUSAN DEL SUR | AGUSAN DEL NORTE | ABRA. Below the table, it says 'Showing 1 to 2 of 2 records'. On the right side of the table, there is an 'Action' column with edit and delete icons. The delete icon for record 2 is highlighted with a red box and an arrow pointing to it from the text 'Click on trash icon'.

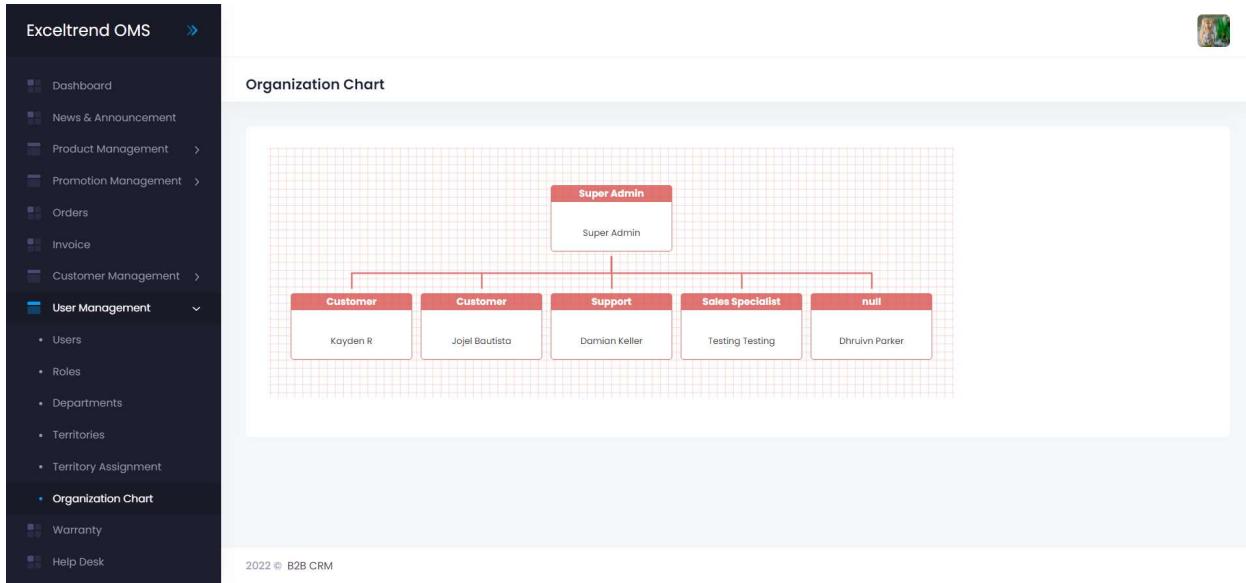
- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.



This screenshot shows the same 'Territory Sales Specialist' page after a record has been selected for deletion. A modal dialog box is centered over the table, asking 'Are you sure?'. It includes a warning message: 'Once deleted, you will not be able to recover this record!' and two buttons: 'Yes, delete it!' and 'Cancel'. The 'Yes, delete it!' button is highlighted with a red box and an arrow pointing to it from the text 'Click on "Yes, delete it!" button'.

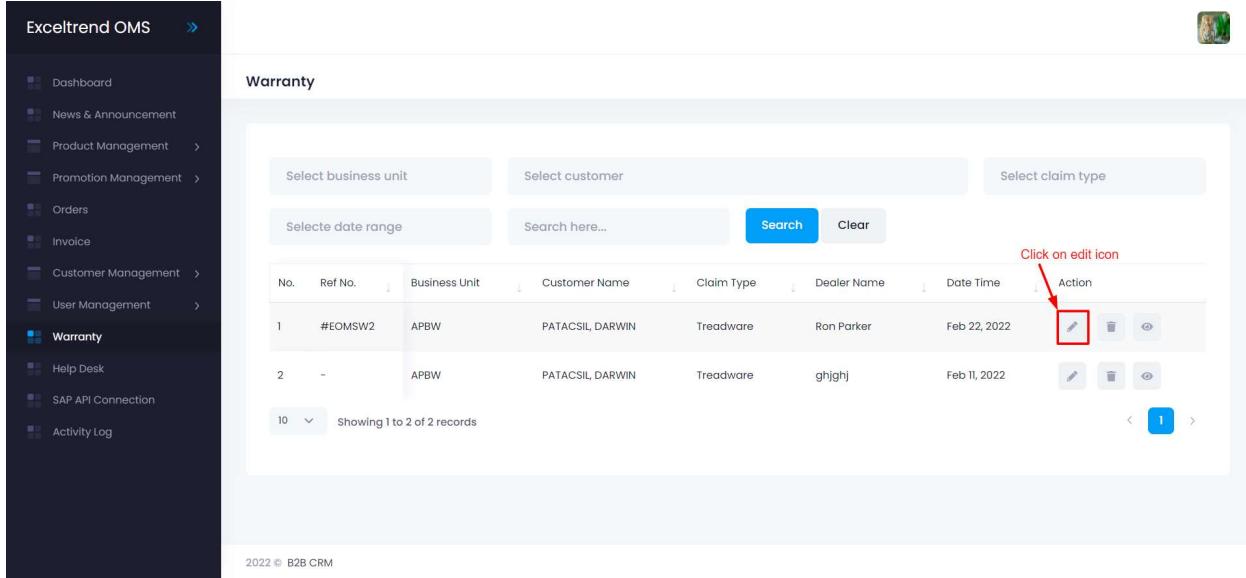
7.6. Organization Chart: -

- Admin can view the hierarchy of role.



8. Warranty

- Admin can edit, update, delete and view the warranty.
- Admin can search the data using the search box.
- Admin can use the different-different filter and filter the data.
- **Video Link: -**
- **Steps: - How to edit the warranty.**
 - Steps 1: - Click on edit icon.



The screenshot shows the Exceltrend OMS system interface. On the left is a dark sidebar with various menu items: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty (which is selected and highlighted in blue), Help Desk, SAP API Connection, and Activity Log. The main area is titled 'Warranty' and contains a search bar with fields for 'Select business unit', 'Select customer', and 'Select claim type', along with 'Search' and 'Clear' buttons. Below the search bar is a date range selector and a search input field. The main content is a table listing claims. The columns are: No., Ref No., Business Unit, Customer Name, Claim Type, Dealer Name, Date Time, and Action. There are two rows of data. The first row has a Ref No. of '#EOMSW2', Business Unit 'APBW', Customer Name 'PATACSLI, DARWIN', Claim Type 'Treadware', Dealer Name 'Ron Parker', Date Time 'Feb 22, 2022', and an Action column with icons. The second row has a Ref No. of '-' (empty), Business Unit 'APBW', Customer Name 'PATACSLI, DARWIN', Claim Type 'Treadware', Dealer Name 'ghjghj', Date Time 'Feb 11, 2022', and an Action column with icons. At the bottom of the table, it says 'Showing 1 to 2 of 2 records'. A red arrow points to the edit icon (pencil) in the Action column of the first row.

No.	Ref No.	Business Unit	Customer Name	Claim Type	Dealer Name	Date Time	Action
1	#EOMSW2	APBW	PATACSLI, DARWIN	Treadware	Ron Parker	Feb 22, 2022	
2	-	APBW	PATACSLI, DARWIN	Treadware	ghjghj	Feb 11, 2022	

- Steps 2: - Update the data.

Exceltrend OMS

- Dashboard
- News & Announcement
- Product Management
- Promotion Management
- Orders
- Invoice
- Customer Management
- User Management
- Warranty**
- Help Desk
- SAP API Connection
- Activity Log

Warranty

Update Details

Date* February 22, 2022 Type of Warranty Claim* Treadware

Customer Name* PATACISIL, DARWIN Customer Phone* 9714587544

Customer Email* eDSB2-2@mailinator.com Customer Location* US Customer Telephone* 9714587544

Customer Address* US

Dealer's Name* Ron Parker Dealer's Location* US Dealer's Telephone* 8574201245

Dealer's Fax Enter dealer's fax

Tire & Vehicle Info

Vehicle Maker* IIO Year* 2020

Vehicle Model* Sport License Plate* XY25U412

Vehicle Mileage* 10

PC/LT Tire Position

LF RF LR RR Front Drive Trailer

Tire Mileage Enter tire mileage
Tire Serial No. Enter tire serial no.

Reason for tire return*
Quality Not good

Location of damage*

Tread Sidewall Shoulder Bead Others

Claim Points

1. Wearing (shoulder wear, center wear, one-sided wear, or any irregular wear on tread)
 Shoulder Center One-Sided Irregular

2. Any sign of cuts or puncture on the tire – indicate if penetrated or not.
 Penetrated Not Penetrated

3. If the tire is repaired, indicate if the repair is hot process or cold patch.
 Hot Process Cold Process

4. Abraision or impact marks near the complaint area of the tread/shoulder, sidewall, bead area.
 Tread Shoulder Sidewall Bead

5. Check for any irregularities on the bead. Below are some irregularities:
 Circle on the bead area (circumferential or not) Deformation on the bead (triangulated or any sign of improper bead seating) Evidence of bead heating and bead rubber brittleness Sign of mounting / demounting damage on bead Edge or separation on the bead area Narrow rim (check/measure bead to bead clearance) – It should be within standard rim as indicated on the sidewall/tire. Trace of chemicals or oil used during tire mounting

6. Inner liner manifestations:
 Sign of crease or stress marks Improper repair or repair failure Inner liner cracks near the bead area of the damage Any sign of running the tire in underinflated condition.

Tire Manifestation Probable Cause

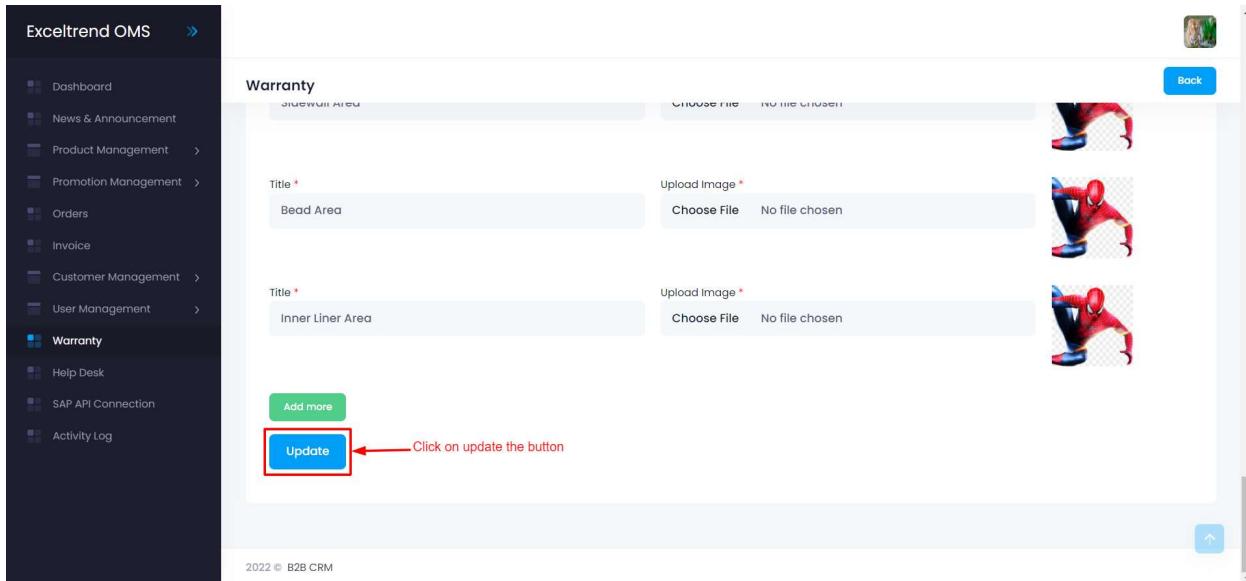
No.	Image	Manifestation	Probable Cause(s)	Yes	No
1.		Deformation or bulging of the tread area.	<ul style="list-style-type: none"> Deconnection or loss of bond between tread plies & rubber element caused by excessive stresses and heat build up. Condition of the tread plies. Improper tread cuts or punctures. Faulty repair. 	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Pictures of the Tire focusing on Damage Areas

Title*	Upload image*	Choose File	No file chosen	
Tread Area	<input type="file"/>	<input type="button" value="Choose File"/>	No file chosen	
Sidewall Area	<input type="file"/>	<input type="button" value="Choose File"/>	No file chosen	
Bead Area	<input type="file"/>	<input type="button" value="Choose File"/>	No file chosen	
Inner Liner Area	<input type="file"/>	<input type="button" value="Choose File"/>	No file chosen	

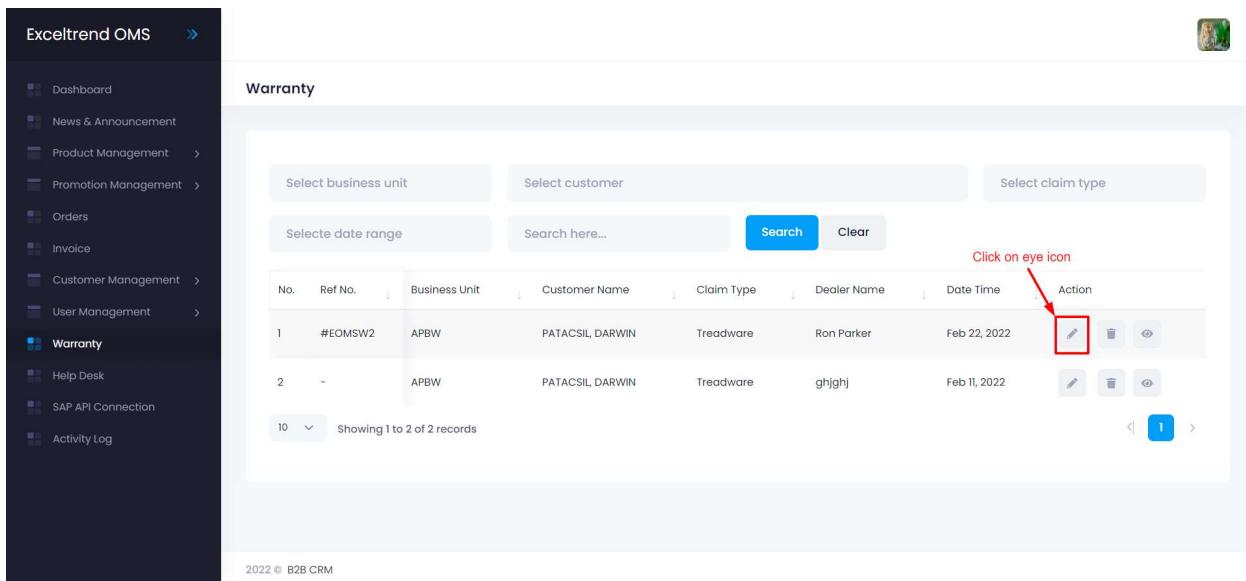
Action Buttons

- Steps 3: - Click on update the button.



- Steps: - How to view the warranty.

- Steps 1: - Click on eye icon.



- Steps 2: - All details show in warranty view page.

Excitrend OMS

Warranty

View Details

Data Date: Feb 22, 2022
Type of Warranty Status: Concessions
Ref No.: 4E00000002
Business Unit: APNW
Customer Name: PATAC SIL DARWIN
Customer Email: 405502_2@mailinator.com
Customer Phone: 9714507544
Customer Location: US
Customer Telephone: 9714507544
Customer Address: US
Dealer Name: Max Tyre
Dealer Location: US
Dealer Telephone: 9714507544
Dealer Fax: -

Tire & Vehicle Info

Vehicle Make: BD
Vehicle Model: SPORT
Vehicle Mileage: 10
Year: 2020
License Plate: XY09DU410
P/C/LT Tire Position: QL, LR, QC, LC
P/C/LT Tire Mileage: -
P/C/LT Tire Serial No.:
2 Wheels/TD Tire Position: FRONT, DRIVE, TRAILER
2 Wheels/TD Tire Mileage:
2 Wheels/TD Tire Serial No.:
Reason for the return: Quality Not Good
Location of damage: Tread, sidewall

Claim Points

1. Wearing (Shoulder wear, center wear, one-sided wear, or any irregular wear on tread)

Shoulder No
 Center Yes
 On-Sided No
 Irregular Yes

2. Any sign of cuts or punctures on the tire - indicates if punctured or not.

generated No
 Not generated Yes

3. If the tire is repaired, indicate if the repair is hot process or cold patch.

- Hot Process No
 - Cold Process Yes

4. Abnormal or Impact marks near the complaint area of the tread/shoulder, sidewall, bead area.

Tread Yes
 Shoulder Yes
 Sidewall Yes
 - Round Yes

5. Check for any irregularities on the bead. Below are some irregularities:

- cracks on the bead area (circumferential or not)
- deformation on the bead (misalignment or any sign of improper bead seating)
- evidence of bead heating and bead rubber brittleness
- sign of mounting / demounting damage on bead
- bulge or separation on the bead area
- narrow rim (check measure bead to bead clearance) - It should be within standard rim as indicated on the sidewall/tire.
- traces of chemicals or oil used during tire mounting

6. inner liner manifestations:

- sign of ozone or stress cracks
- improper repair or repair failures
- inner liner cracks near the bead area of the damage
- any sign of running the tire in underinflated condition

Tire Manifestation Probable Cause

No.	Image	Description	Probable Cause(s)	Answer
1.		- Deformation or bulging of the tread area.	<ul style="list-style-type: none"> - Deformations or loss of bond between tread plies & rubber - Misaligned or off-center top edge of the tread - Evidence of the tread pasting - Evidence of tread rub or puncture - Faulty repair 	No

Pictures of the Tire focusing on Damage Areas

No.	Title	Image
1.	Tread Area	
2.	Sidewall Area	
3.	Bead Area	
4.	Inner Liner Area	

- **Steps: - How to delete the warranty.**
 - Steps 1: - Click on trash icon and appear pop-up model.

The screenshot shows the 'Warranty' section of the Exceltrend OMS. On the left is a sidebar with various menu items. The main area displays a table of warranty claims with columns for No., Ref No., Business Unit, Customer Name, Claim Type, Dealer Name, Date Time, and Action. The 'Action' column contains icons for edit, delete, and view. The second row in the table has a red box around the delete icon. At the bottom of the table, it says 'Showing 1 to 2 of 2 records'.

- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.

The screenshot shows the same 'Warranty' page as above, but with a modal dialog box overlaid. The dialog has a warning icon and asks 'Are you sure?'. Below it, a message says 'Once deleted, you will not be able to recover this record!'. At the bottom of the dialog, there are two buttons: 'Yes, delete it!' (highlighted with a red box) and 'Cancel'. The background table is partially visible behind the dialog.

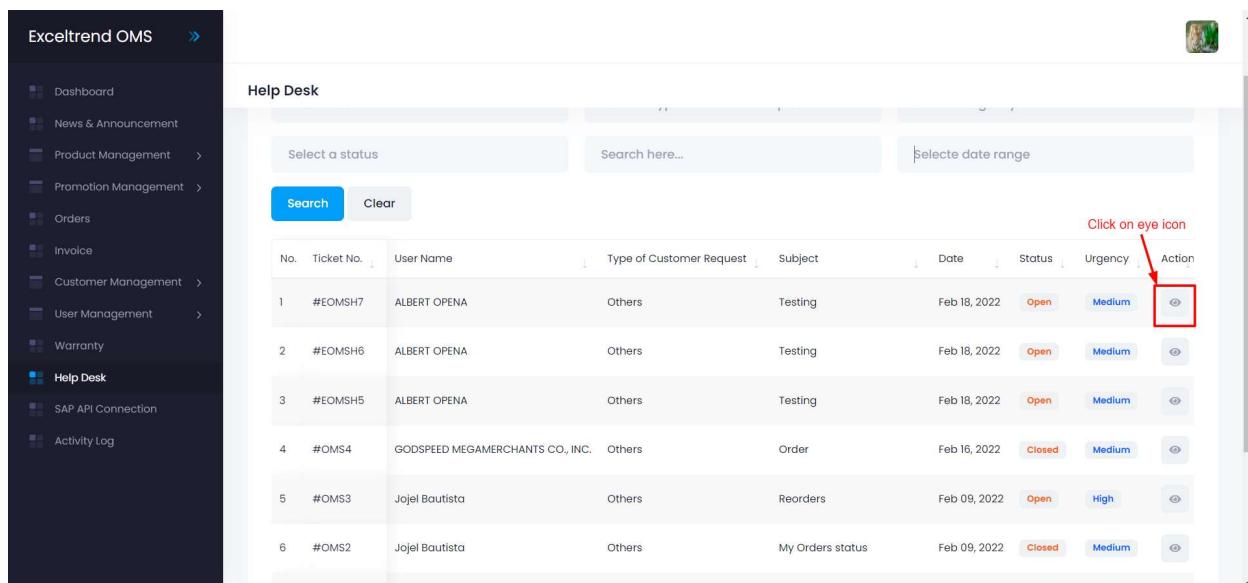
9. Help Desk: -

- Admin can view the help ticket in help desk listing page.
- Admin can view the help ticket and replay the customer.
- Admin can update the ticket status.
- Admin can search through searching the data.
- Admin can use the different-different filter and filter the data.

- **Video Link:** - <https://www.screencast.com/t/avz1un82>

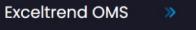
- **Steps: - How to view the ticket**

- Steps 1: - Click on eye icon.



No.	Ticket No.	User Name	Type of Customer Request	Subject	Date	Status	Urgency	Action
1	#EOMSH7	ALBERT OPENA	Others	Testing	Feb 18, 2022	Open	Medium	
2	#EOMSH6	ALBERT OPENA	Others	Testing	Feb 18, 2022	Open	Medium	
3	#EOMSH5	ALBERT OPENA	Others	Testing	Feb 18, 2022	Open	Medium	
4	#OMS4	GODSPEED MEGAMERCHANTS CO., INC.	Others	Order	Feb 16, 2022	Closed	Medium	
5	#OMS3	Jojel Bautista	Others	Reorders	Feb 09, 2022	Open	High	
6	#OMS2	Jojel Bautista	Others	My Orders status	Feb 09, 2022	Closed	Medium	

- Steps 2: - All ticket details show in view page.



Help Desk

View Details

Ticket number:	#EOMSH7
Type of Customer Request:	Others
User Name:	ALBERT OPENA
User Email:	albert502-2@mailinator.com
Created date:	Feb 18, 2022 03:25 PM
Last updated at:	Feb 18, 2022 03:25 PM
Urgency:	Medium
Status:	Open
Subject:	Testing

What is Lorem Ipsum?
 Lorem Ipsum is simply a dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Message:
Why do we use it?
 It is a long-established fact that a reader will be distracted by the readable content of a page when looking at its layout. The point of using Lorem Ipsum is that it has a more-or-less normal distribution of letters, as opposed to using 'Content here, content here, making it look like readable English. Many desktop publishing packages and web page editors now use Lorem Ipsum as their default model text, and a search for 'Lorem Ipsum' will uncover many websites still in their infancy. Various versions have evolved over the years, sometimes by accident, sometimes on purpose (injected humor and the like).

Images:



Up

Up

Up

Up



Back

2022 © B2B CRM

- Steps: - How to update the ticket status.
 - Steps 1: - Click on eye icon.

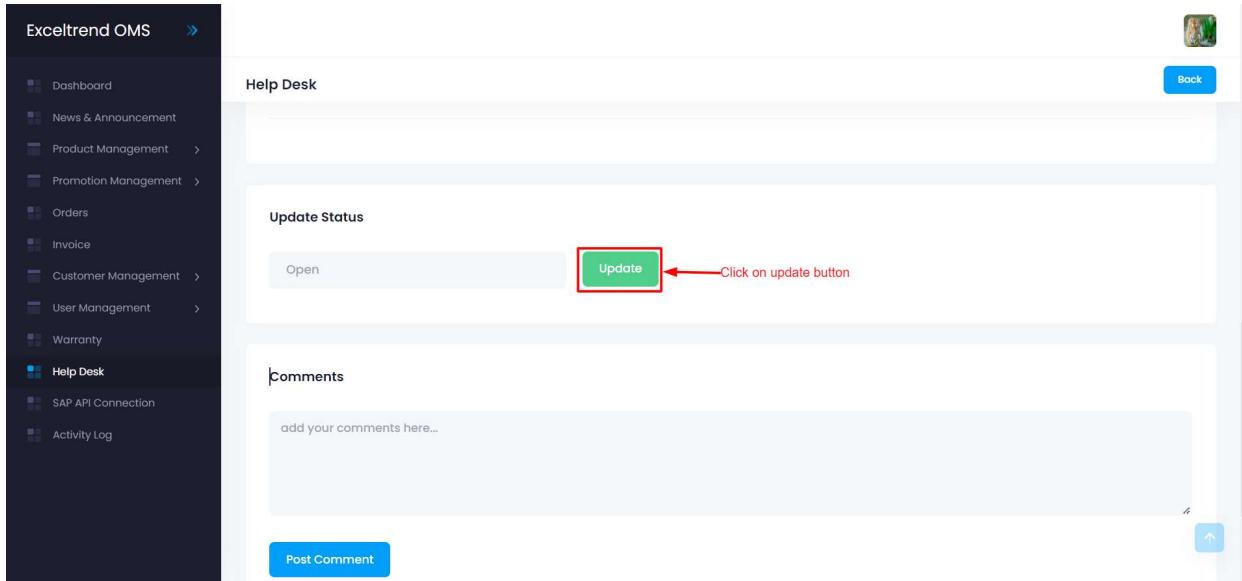
The screenshot shows the Exceltrend OMS Help Desk interface. On the left is a dark sidebar with various management options like Product Management, Promotion Management, and Help Desk. The main area is titled 'Help Desk' and contains a table of tickets. The columns include No., Ticket No., User Name, Type of Customer Request, Subject, Date, Status, Urgency, and Action. The 'Action' column has an eye icon in the first row, which is highlighted with a red box and a red arrow pointing to it from the top right.

No.	Ticket No.	User Name	Type of Customer Request	Subject	Date	Status	Urgency	Action
1	#EOMSH7	ALBERT OPENA	Others	Testing	Feb 18, 2022	Open	Medium	
2	#EOMSH6	ALBERT OPENA	Others	Testing	Feb 18, 2022	Open	Medium	
3	#EOMSH5	ALBERT OPENA	Others	Testing	Feb 18, 2022	Open	Medium	
4	#OMS4	GODSPEED MEGAMERCHANTS CO, INC.	Others	Order	Feb 16, 2022	Closed	Medium	
5	#OMS3	Jojel Bautista	Others	Reorders	Feb 09, 2022	Open	High	
6	#OMS2	Jojel Bautista	Others	My Orders status	Feb 09, 2022	Closed	Medium	

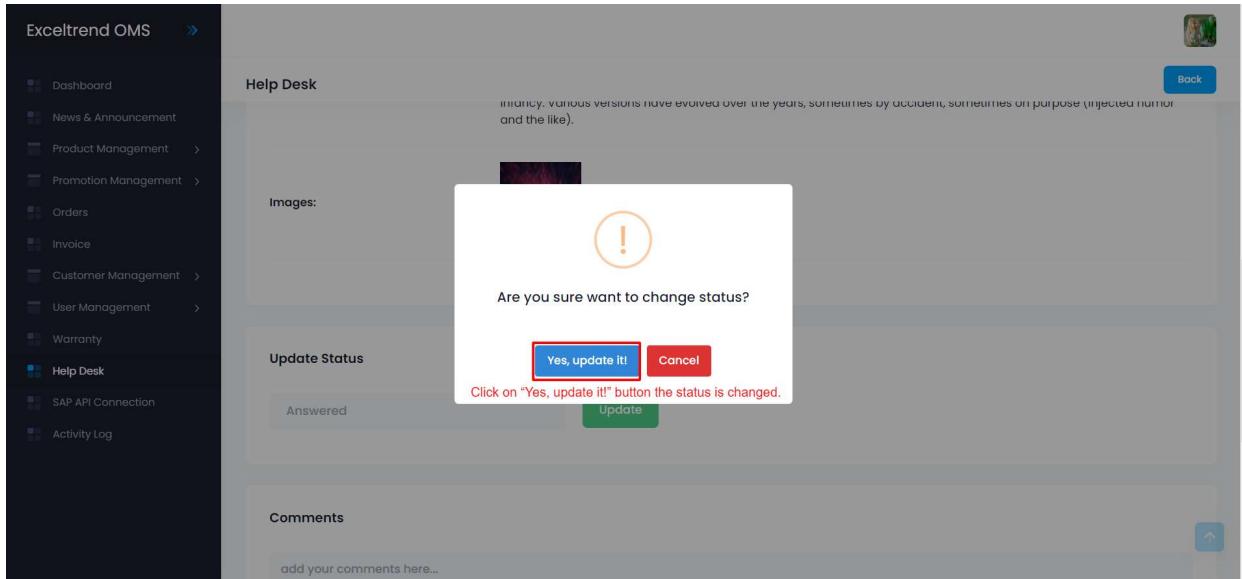
- Steps 2: - Select the status.

The screenshot shows the 'Update Status' dialog box. It has a text input field containing 'Open' and a green 'Update' button. Below the input field is a dropdown menu with four options: 'Open' (highlighted with a red box), 'In Progress', 'Answered', and 'Closed'. To the right of the dropdown, a red box encloses the text 'Select the status.' At the bottom of the dialog is a blue 'Post Comment' button.

- Steps 3: - Click on update button and appear the pop-up model.



- Steps 4: - Pop-up model appear and show message “Are you sure want to change status?” and click on “Yes, update it!” button the status is changed.



- Steps: - How to reply the ticket.
- Steps 1: - Click on eye icon.

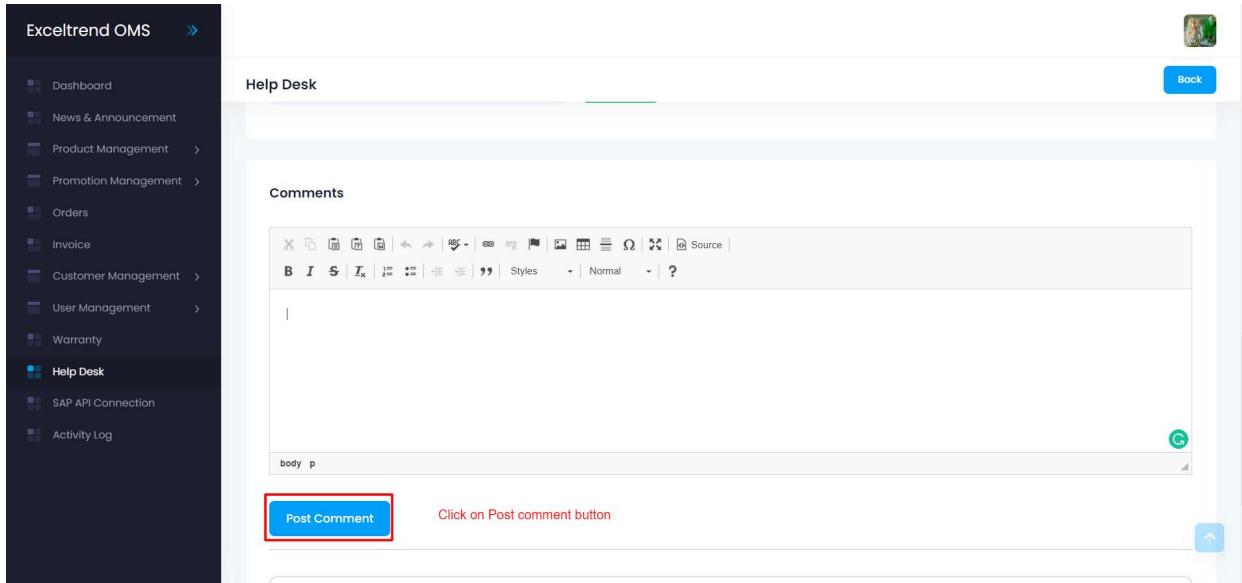
The screenshot shows the 'Help Desk' section of the Exceltrend OMS system. On the left is a dark sidebar with various menu items. The main area is titled 'Help Desk' and contains a table of tickets. The table has columns for No., Ticket No., User Name, Type of Customer Request, Subject, Date, Status, Urgency, and Action. The 'Action' column contains icons, with the first one highlighted by a red box and a red arrow pointing to it, labeled 'Click on eye icon'.

No.	Ticket No.	User Name	Type of Customer Request	Subject	Date	Status	Urgency	Action
1	#EOMSH7	ALBERT OPENA	Others	Testing	Feb 18, 2022	Open	Medium	
2	#EOMSH6	ALBERT OPENA	Others	Testing	Feb 18, 2022	Open	Medium	
3	#EOMSH5	ALBERT OPENA	Others	Testing	Feb 18, 2022	Open	Medium	
4	#OMS4	GODSPEED MEGAMERCHANTS CO, INC.	Others	Order	Feb 16, 2022	Closed	Medium	
5	#OMS3	Jojel Bautista	Others	Reorders	Feb 09, 2022	Open	High	
6	#OMS2	Jojel Bautista	Others	My Orders status	Feb 09, 2022	Closed	Medium	

- Steps 2: - Enter the message in message box.

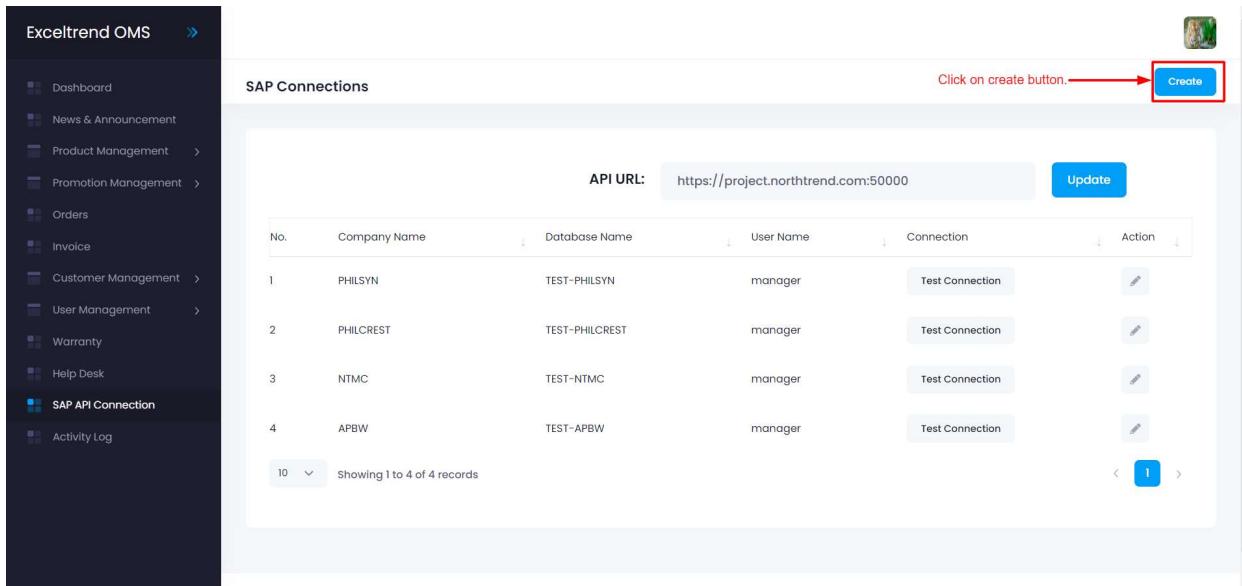
The screenshot shows the 'Comments' section of the Help Desk. It features a rich text editor toolbar at the top. Below the toolbar is a large text area with a placeholder 'Enter the message over here.' At the bottom of the text area is a code snippet showing the HTML structure of the comment. At the very bottom is a blue 'Post Comment' button.

- Steps 3: - Click on Post comment button.



10. SAP API Connection: -

- Admin can create, edit and update the API connection.
- Admin can update the API URL.
- **Video Link:** - <https://www.screencast.com/t/sWiX10KbbKy>
- **Steps: - How to create an SAP API Connection.**
 - Steps 1: - Click on create button.



- Steps 2: - Enter the data company name, database name, user name, and password.

The screenshot shows the 'Add Details' page for SAP Connections in the Exceltrend OMS system. The left sidebar lists various modules like Dashboard, News & Announcement, Product Management, etc. The main area has four input fields: 'Company Name*' (placeholder: Enter company name), 'Database Name*' (placeholder: Enter database name), 'User Name*' (placeholder: Enter user name), and 'Password*' (placeholder: Enter password). A blue 'Save' button is located at the bottom left of the form. In the top right corner, there is a small profile picture and a 'Back' button.

- Steps 3: - Click on save button

This screenshot is identical to the previous one, showing the 'Add Details' form for SAP Connections. However, a red box highlights the 'Save' button, and a red arrow points to it from the text 'Click on save button' located below the button.

- Steps 4: - Created API show on listing page.

The screenshot shows the SAP Connections page within the Exceltrend OMS system. The left sidebar includes links for Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection (which is selected), and Activity Log. The main content area is titled "SAP Connections" and displays a table with the following data:

No.	Company Name	Database Name	User Name	Action
1	PHILSYN	TEST-PHILSYN	manager	<button>Test Connection</button> <button>Edit</button>
2	PHILCREST	TEST-PHILCREST	manager	<button>Test Connection</button> <button>Edit</button>
3	NTMC	TEST-NTMC	manager	<button>Test Connection</button> <button>Edit</button>
4	APBW	TEST-APBW	manager	<button>Test Connection</button> <button>Edit</button>

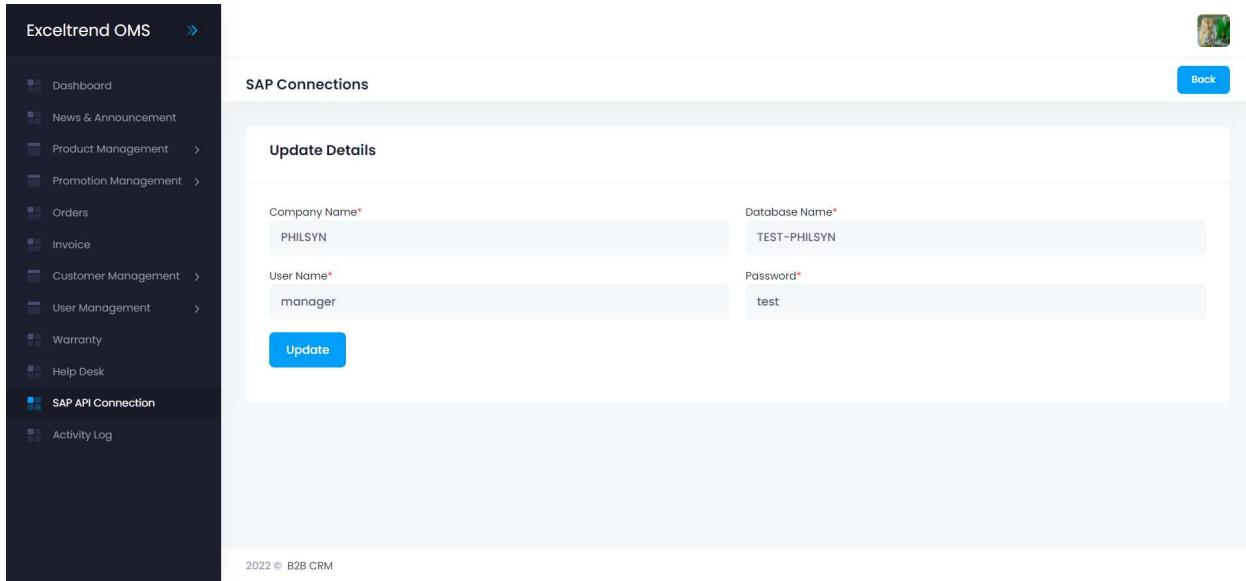
At the bottom, there is a pagination indicator "Showing 1 to 4 of 4 records". A blue "Update" button is located at the top right of the table area.

- Steps: - How to edit the SAP API

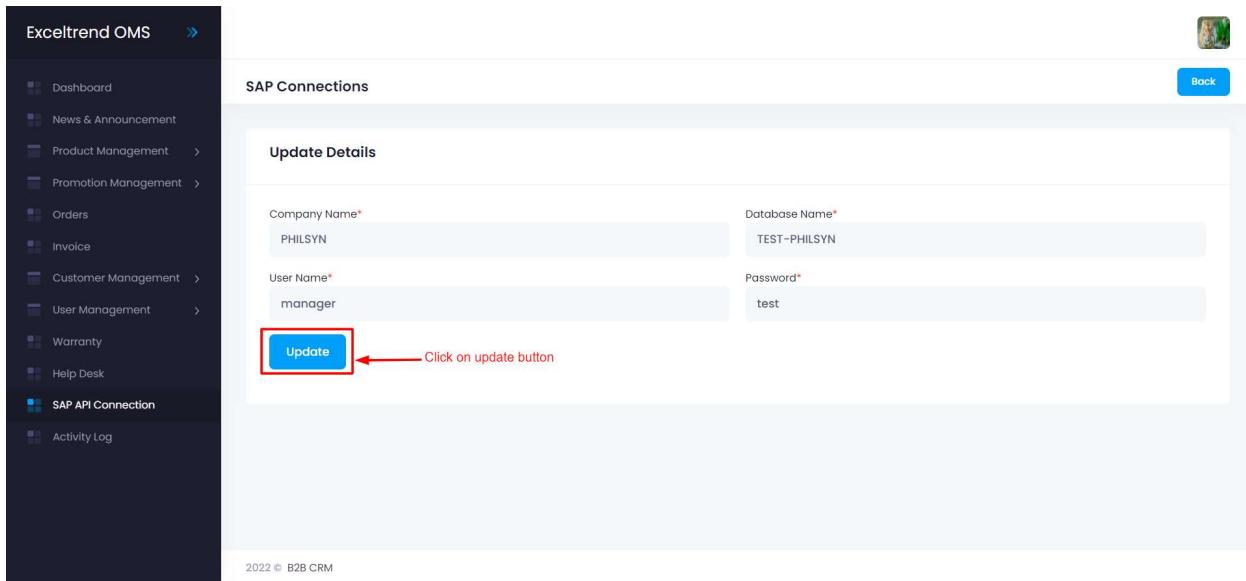
- Steps 1: - Click on pencil icon.

This screenshot is identical to the one above, showing the SAP Connections page. However, it includes a red box and a red arrow pointing to the edit icon (pencil symbol) next to the "Action" column for the first connection (PHILSYN). Above the table, the text "Click on pencil icon" is written in red, indicating the specific step being demonstrated.

- Steps 2: - Update the data company name, database name, user name, and password.



- Steps 3: - Click on update button.



11. Activity Log

- Admin can see the log for OMS and SAP system
- Admin can use the different-different filter and filter the data.
- Admin can search the data using search box through.
- **Video Link:** - <https://www.screencast.com/t/fHKalUI3AV>

12. Report

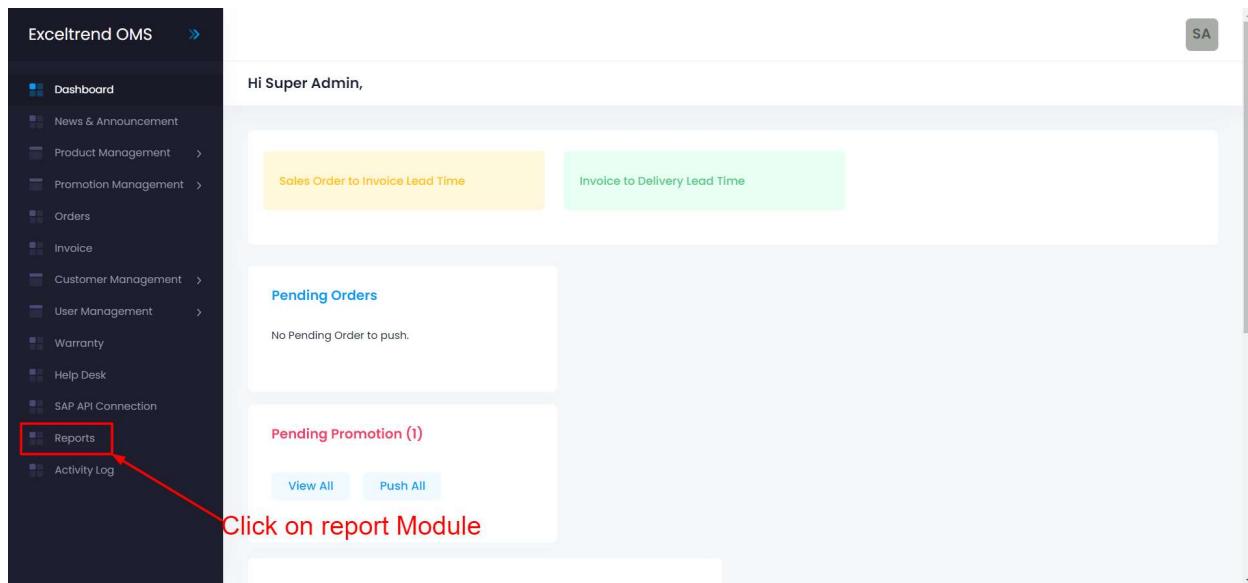
- Admin can see the all type of report in this module.
- Report module inside different type report show.
- Admin can show the all report in particular report page.

12.1 Promotions Report: -

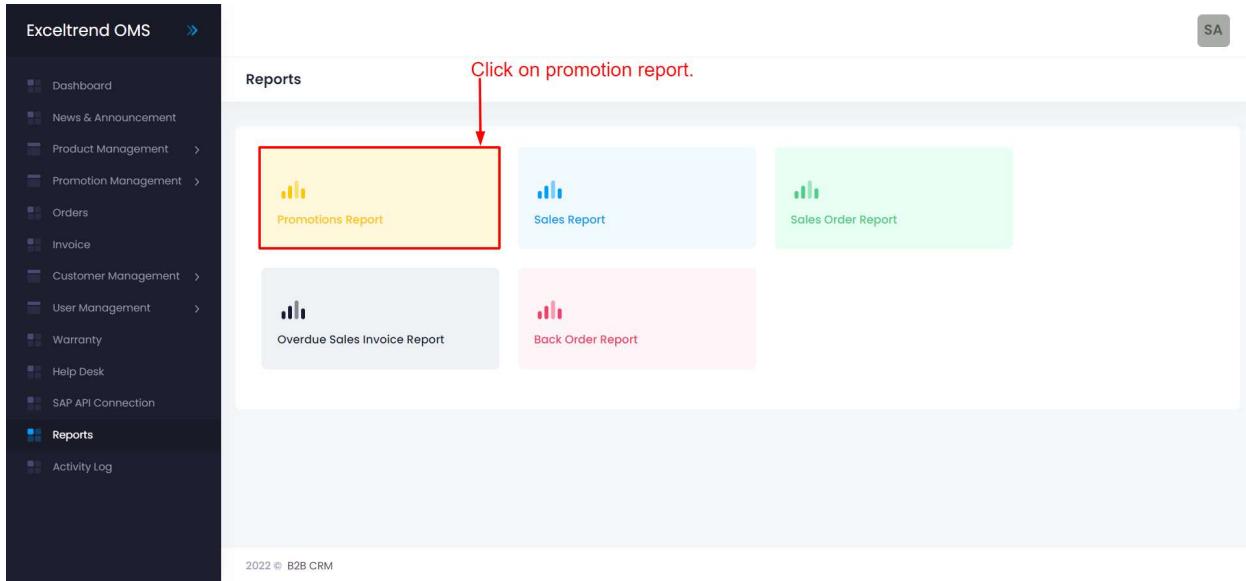
- Admin can see the promotion report in particular report page.
- Admin can see the all promotion details in this report.
- Admin can use the different-different filter and filter the data.
- Video Link: - <https://www.screencast.com/t/Y3ASTHAaP9C>

○ Steps: - How to see the promotions report.

- Steps 1: - Click on Report module.



- Steps 2: - Click on promotions report.



- Steps 3: - Show the all-promotion related data in listing page.

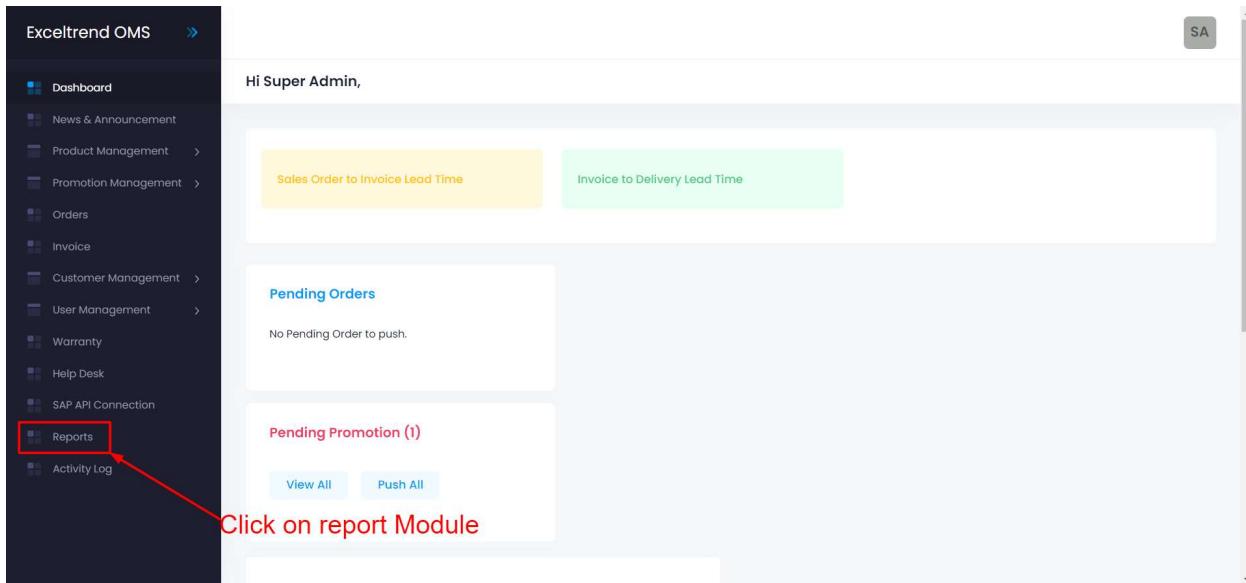
The screenshot shows the 'Promotion Reports' listing page. The table displays the following data:

No	Business Unit	Status	No. of Promotion	Total Sales Quantity	Total Sales Revenue
1	APBW	Pending	0	0	0.00
2	APBW	Approved	0	0	0.00
3	NTMC	Pending	0	0	0.00
4	NTMC	Approved	1	2	0.00
5	PHILCREST	Pending	0	0	0.00
6	PHILCREST	Approved	0	0	0.00
7	PHILSYN	Pending	0	0	0.00
8	PHILSYN	Approved	0	0	0.00

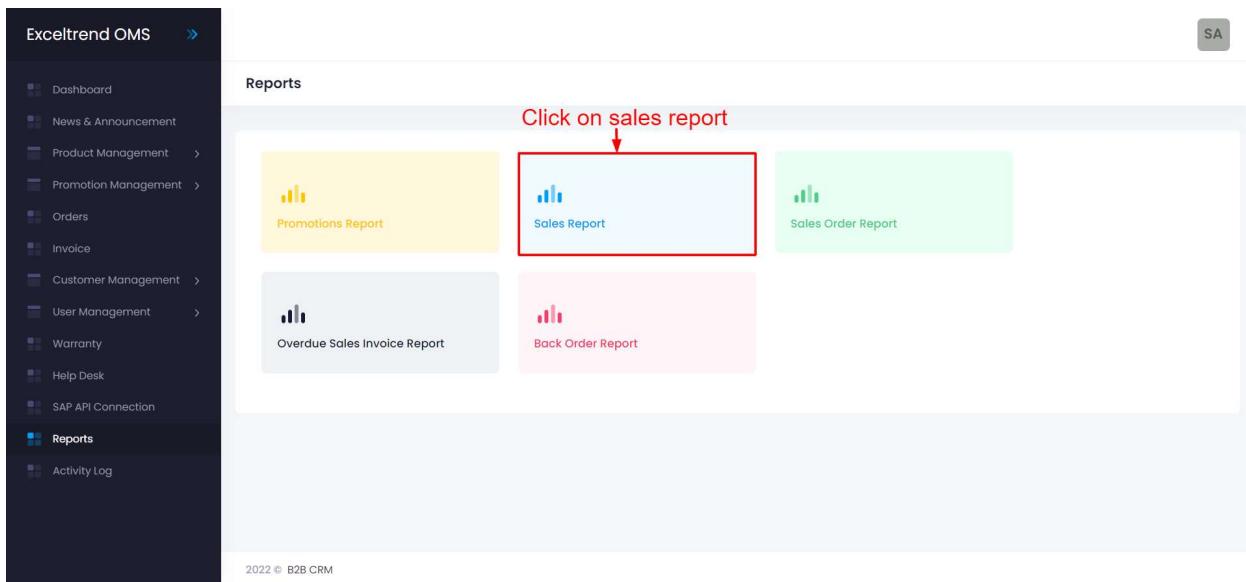
Showing 1 to 8 of 8 records

12.2 Sales Report: -

- Admin can see the sales report in particular report page.
- Admin can see the all sales details in this report.
- Admin can use the different-different filter and filter the data.
- Video Link: - <https://www.screencast.com/t/ACH1WTp5ax>
- Steps: - How to see the sales report.
 - Steps 1: - Click on Report module.



- Steps 2: - Click on sales report.

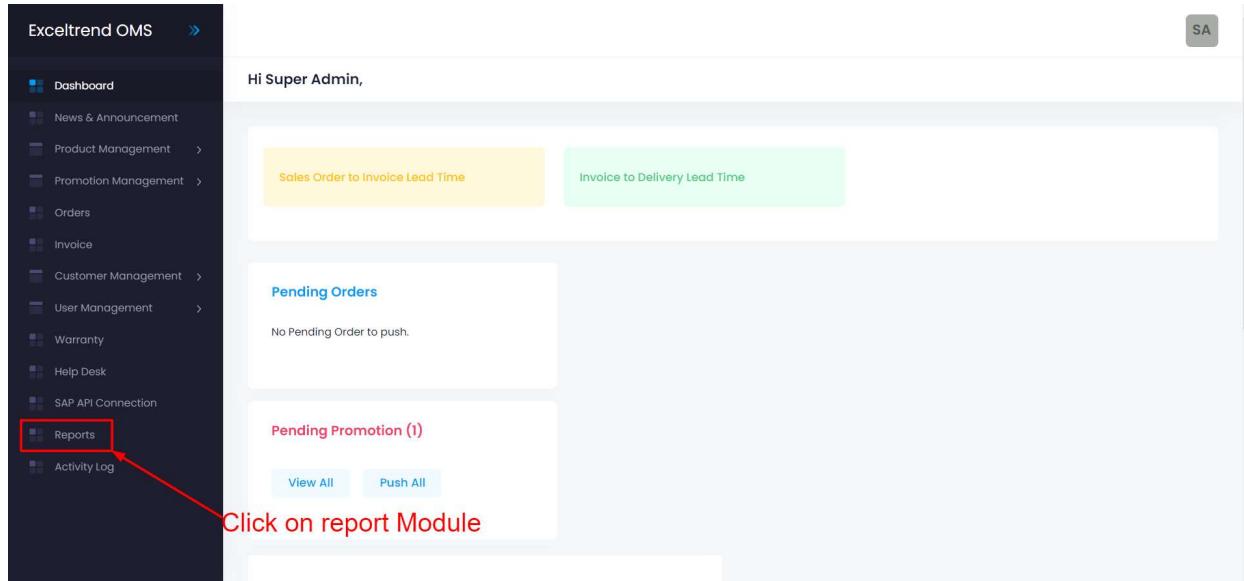


- Steps 3: - Show the all-sales related data in listing page.

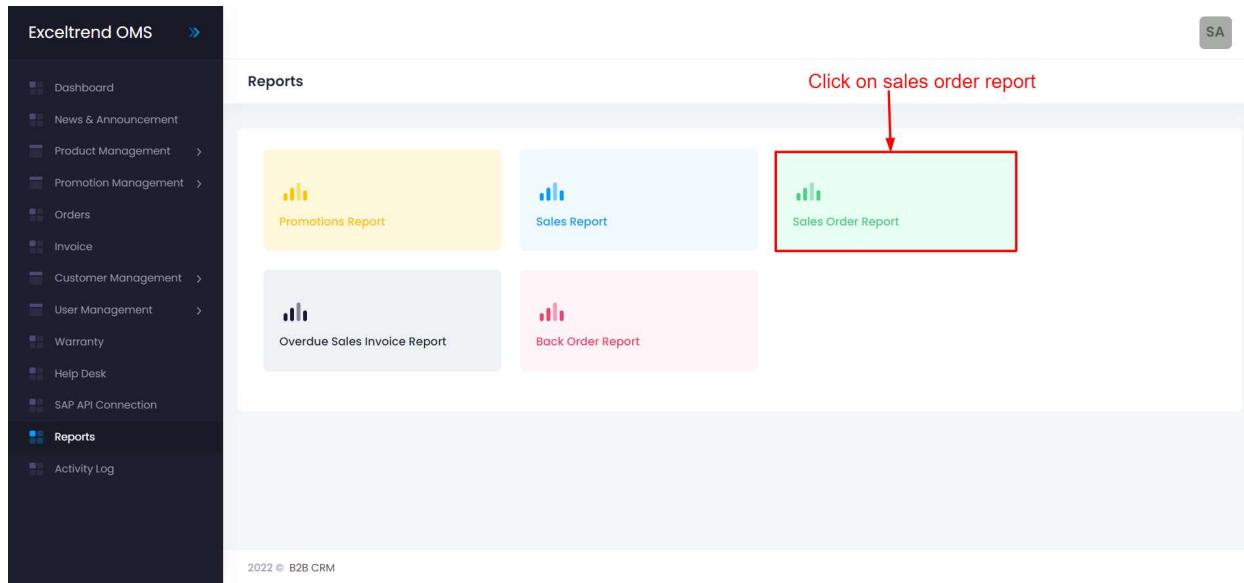
No.	Product Code	Product Name	Brand	Business Unit	Total Quantity	Total Price	Total Price After VAT			
1	BL20009	BIRLA I0.00-20 18PR BISON	OTHER BRANDS	APBW	1	₹ 1,548.00	₹ 1,548.00			
2	PRI7001	***PRESA 205/45 ZR17 PS55 TL	PRESA	APBW	3	₹ 6,272.18	₹ 7,024.85			
3	MMI14017	MXS MCT 80/80 - 14 M6029W 37P TL	MAXXIS-MCT	APBW	3	₹ 862.11	₹ 965.60			
4	MMI14018	MXS MCT 90/80 - 14 M6029W 43P TL	MAXXIS-MCT	APBW	3	₹ 1,023.57	₹ 1,146.40			
5	KT00063	TUBE-DONG-AH 8.25 - 16	FLAPS & TUBES	APBW	4	₹ 0.00	₹ 0.00			
6	PRI6003	PRESA 7.50-16 14PR P276	PRESA	APBW	6	₹ 6,262.50	₹ 7,014.00			
7	CS22012	CST 12R22.5 16PR CR969(+/-) TL	CST	APBW	10	₹ 15,803.67	₹ 17,700.13			
8	CT00048	MCT TUBE 2.75/3.00-21 TR4	FLAPS & TUBES	APBW	50	₹ 187.00	₹ 209.44			
9	MMI14020	MXS MCT 70/90 - 14 VIC S98 34S TL	MAXXIS-MCT	APBW	20	₹ 948.57	₹ 1,062.40			
10	MMI14021	MXS MCT 80/80 - 14 VIC S98 40S TL	MAXXIS-MCT	APBW	20	₹ 1,031.43	₹ 1,155.20			
11	CMI14014	CST MCT 90/80 - 14 C6577 TL	CST-MCT	APBW	30	₹ 1,882.86	₹ 2,088.80			
12	CMI17057	CST MCT 110/70 R17 CM615 TL	CST-MCT	APBW	12	₹ 620.76	₹ 695.25			
13	CMI17036	CST MCT 60/80 - 17 C6161 TT	MAXXIS-MCT	APBW	38	₹ 556.43	₹ 623.20			
14	MMI17041A	MXS MCT 90/80 - 17 M6233W TL	MAXXIS-MCT	APBW	20	₹ 1,545.00	₹ 1,730.40			
15	MMI17040	CST MCT 90/80 - 17 C6161 TT	MAXXIS-MCT	APBW	20	₹ 887.14	₹ 993.60			
16	CMI17030	CST MCT 3.00-17 6PR C6507	MAXXIS-MCT	APBW	370	₹ 1,237.72	₹ 1,386.20			
17	CSI5022	CST 35X12.5-15 6PR CL18 TL	CST	APBW	4	₹ 8,203.75	₹ 9,188.20			
18	CMI17063	CST MCT 60/80 - 17 A6603 TL	CST-MCT	APBW	400	₹ 137.95	₹ 154.50			
100	▼	Showing 1 to 100 of 257 records				<	1	2	3	>

12.3 Sales Order Report: -

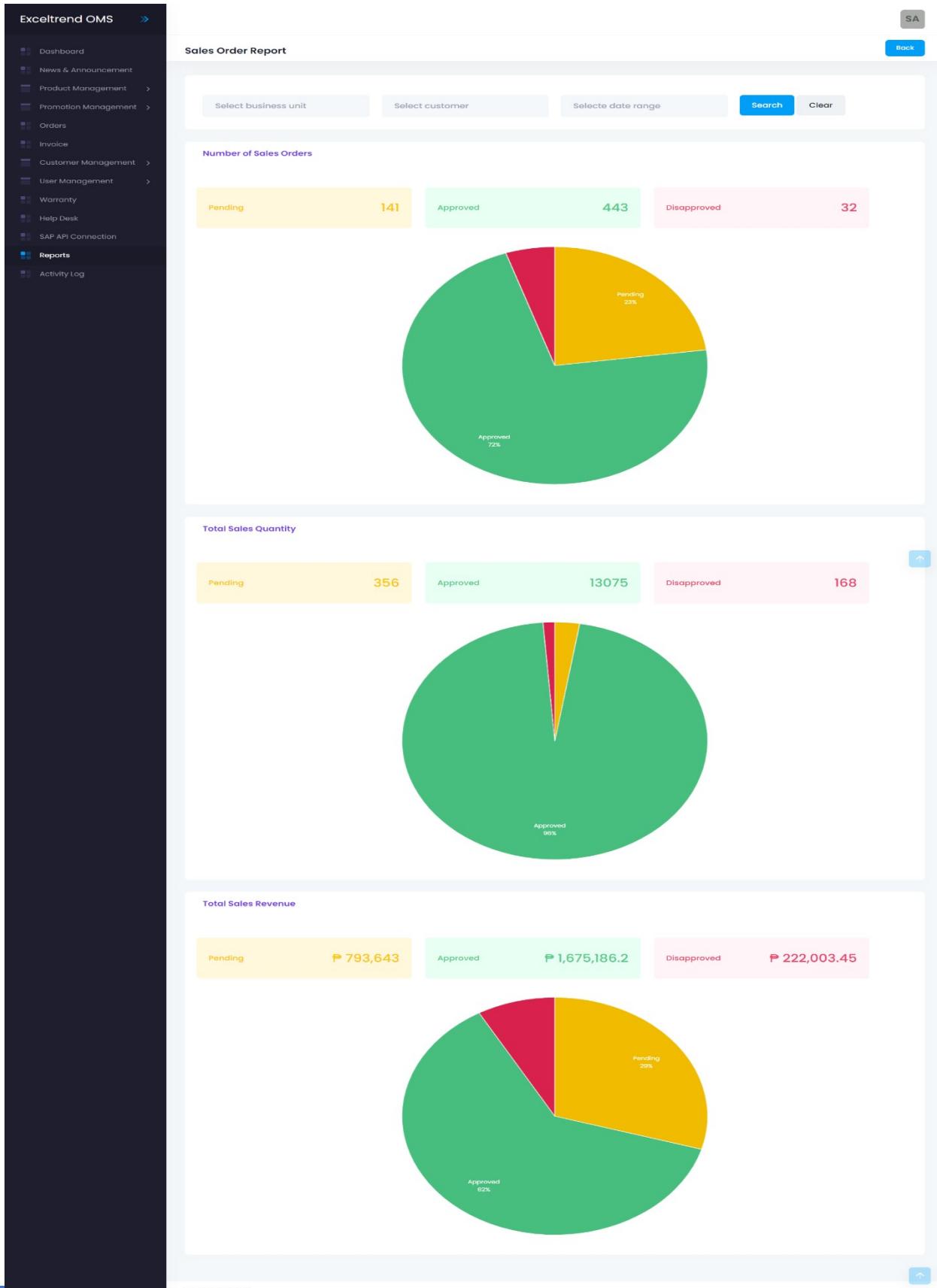
- Admin can see the sales order report in particular report page.
- Admin can see the all sales details in this report.
- Admin can use the different-different filter and filter the data.
- Video Link: - <https://www.screencast.com/t/TVu5gV8y>
- Steps: - How to see the sales order report.
 - Steps 1: - Click on Report module.



- Steps 2: - Click on sales order report.

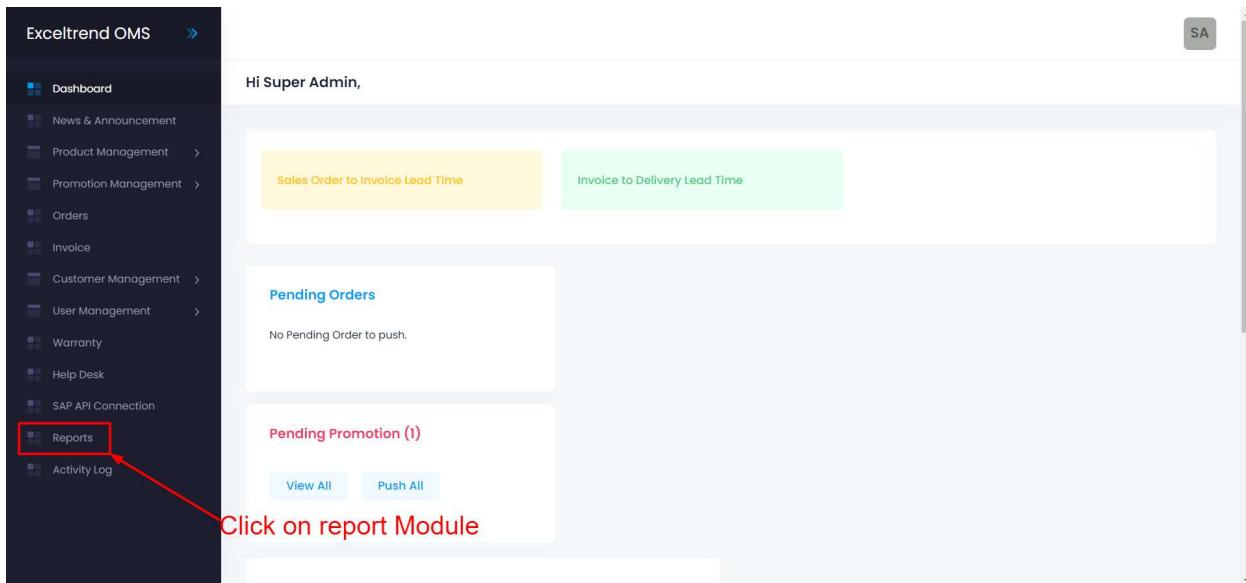


- Steps 3: - Show the all-sales order related data in listing page.



12.4 Overdue Sales invoice Report: -

- Admin can see the overdue sales invoice report in particular report page.
 - Admin can see the all overdue sales invoice details in this report.
 - Admin can use the different-different filter and filter the data.
 - Admin can export the report data.
 - Video Link: - <https://www.screencast.com/t/WV9UhKdIc7OI>
- **Steps: - How to see the overdue sales invoice report.**
- Steps 1: - Click on Report module.



- Steps 2: - Click on overdue sales invoice report.

The screenshot shows the 'Reports' section of the Exceltrend OMS system. On the left is a dark sidebar with navigation links: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, Reports (which is selected and highlighted in blue), and Activity Log. The main area is titled 'Reports' and contains five report cards:

- Promotions Report (yellow card)
- Sales Report (light blue card)
- Sales Order Report (light green card)
- Overdue Sales Invoice Report (pink card, highlighted with a red box and a red arrow pointing to it)
- Back Order Report (light pink card)

At the bottom left of the main area, there is a small text: 2022 © B2B CRM. In the top right corner of the main area, there is a small grey box with the letters 'SA'.

- Steps 3: - Show the all overdue sales invoice related data in listing page.

Overdue Sales Invoice Report

Number of Overdue Invoices: 1789

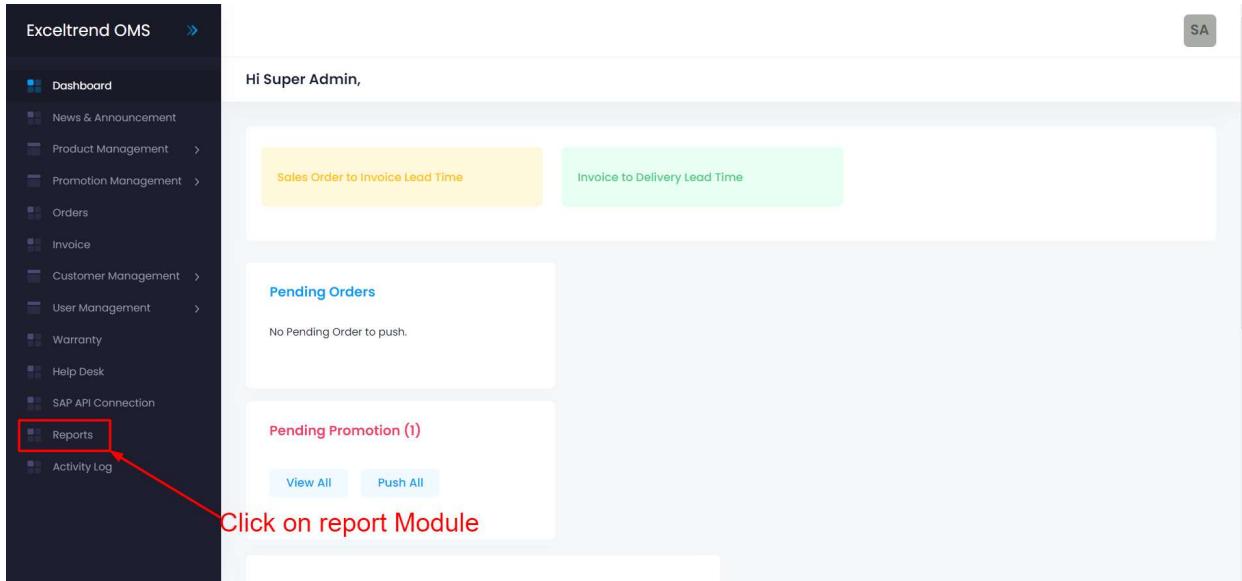
Total Amount of Overdue Invoices: P 233,487,916.96

No.	Invoice #	Business Unit	Customer Name	Total	Created Date
1	29008	NTMC	PHIL COMMERCIAL TRAMP SHIPPING CORP	P 76,883.40	Jan 28, 2022
2	29023	NTMC	TSUNEISHI HEAVY INDUSTRIES (CEBU) INC.	P 856,800.00	Jan 28, 2022
3	86184	APBW	CIMEM CONSUMER DISTRIBUTORS INC.	P 10,304.71	Jan 28, 2022
4	86185	APBW	CIMEM CONSUMER DISTRIBUTORS INC.	P 11,652.72	Jan 28, 2022
5	86256	APBW	ESE AUTO PARTS ENTERPRISES INC.	P 60,511.81	Jan 28, 2022
6	86255	APBW	ESE AUTO PARTS ENTERPRISES INC.	P 160,904.17	Jan 28, 2022
7	86253	APBW	ESE AUTO PARTS ENTERPRISES INC.	P 206,680.36	Jan 28, 2022
8	86252	APBW	ESE AUTO PARTS ENTERPRISES INC.	P 148,816.10	Jan 28, 2022
9	29006	NTMC	TSUNEISHI HEAVY INDUSTRIES (CEBU) INC.	P 18,150.00	Jan 28, 2022
10	10725	PHILSYN	NORTH TREND MARKETING CORP.	P 4,452.80	Jan 28, 2022

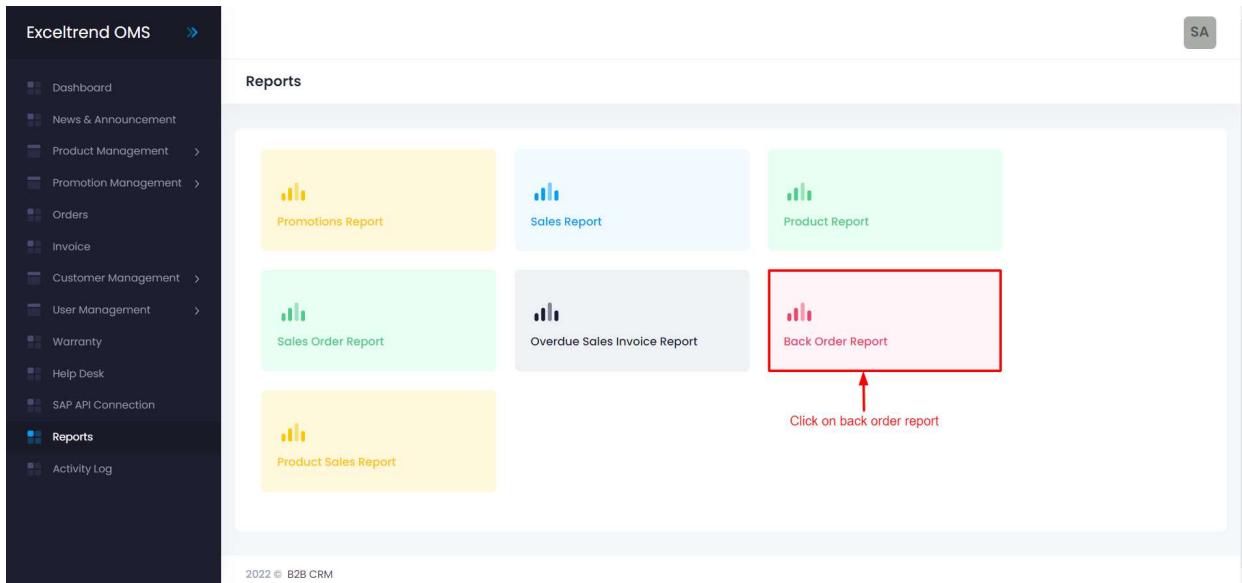
Showing 1 to 10 of 1,789 records

12.5 Back Order Report: -

- Admin can see the back order report in particular report page.
- Admin can see the all back order details in this report.
- Admin can use the different-different filter and filter the data.
- Video Link: - <https://www.screencast.com/t/H3ZVkh0j>
 - Steps: - How to see the back order report.
 - Steps 1: - Click on Report module



- Steps 2: - Click on back order report.

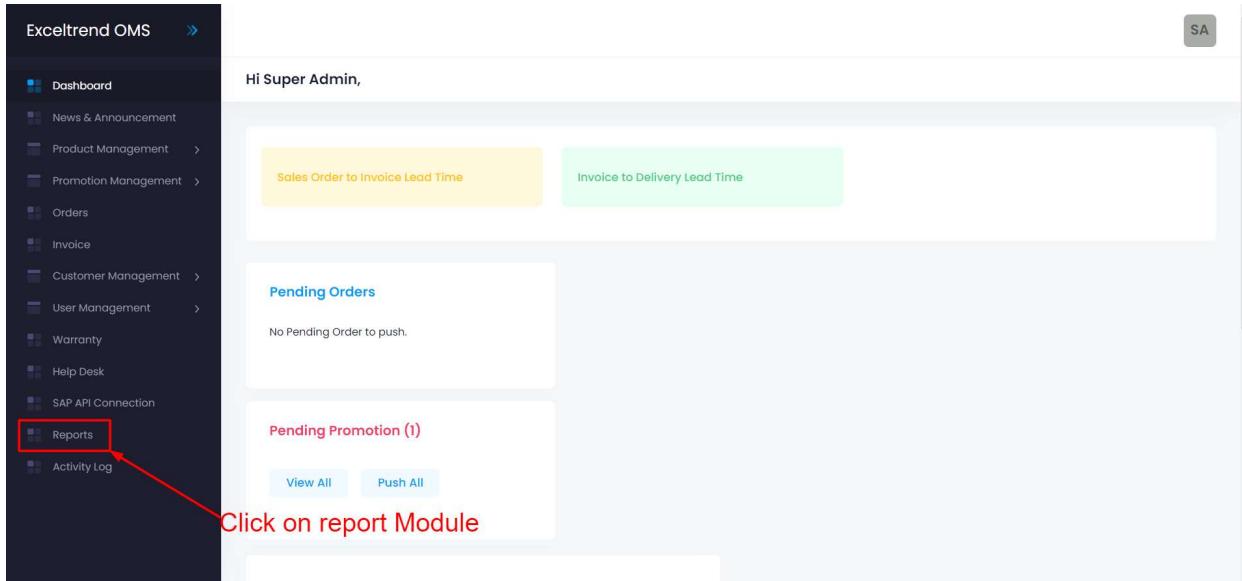


- Steps 3: - Show the all back order related data in listing page.

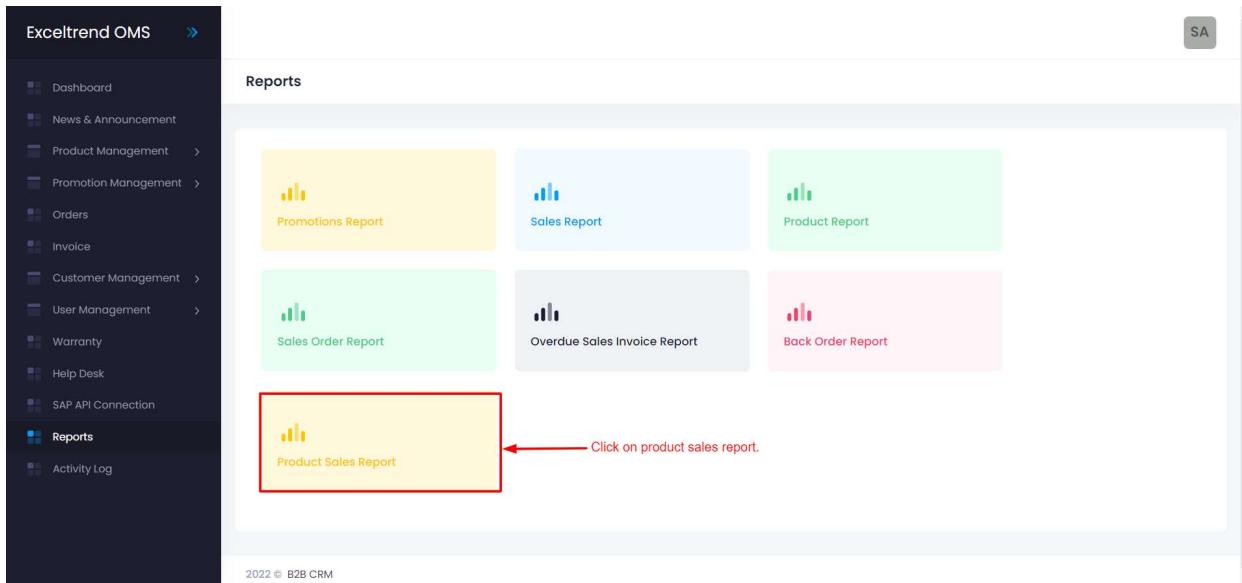
No.	Product Code	Product Name	Brand	Business Unit	Total Quantity	Total Price	Total Price After VAT
1	MXI2006	MXS 145 R12C MCV5 8PR TL 86/84N ESR MAXXIS	MAXXIS	APBW	3	₱ 0.00	₱ 0.00
2	CMI7080	CST MCT 70/80-17 TL CM619 35P	CST-MCT	APBW	2	₱ 1,135.70	₱ 1,135.70
3	PR22008	PRESA 10.00 R20 16PR PL909 SET	PRESA	APBW	2	₱ 29,552.50	₱ 29,552.50
4	MXI7073	MXS 265/70 R17 116T AT811	MAXXIS	APBW	14	₱ 7,981.04	₱ 8,938.30
5	MXI7052	MXS LT285/70 R17 10PR MT772 TL	MAXXIS	APBW	2	₱ 0.00	₱ 0.00
6	MXI8025	MXS LT275/65 R18 10PR MT772 TL	MAXXIS	APBW	1	₱ 0.00	₱ 0.00
7	CSI3007	CST 175/70 R13 MR61 TL	CST	APBW	10	₱ 1,543.81	₱ 1,729.00
8	CSI4006	CST 185/65 R14 CS889 TL	CST	APBW	10	₱ 1,696.25	₱ 1,899.80
9	CSI6027	CST 195/55 R16 MD-A1 TL 91V	CST	APBW	10	₱ 2,303.75	₱ 2,580.20
10	CSI6036	CST 245/70 R16 AT2 TL	CST	APBW	10	₱ 4,211.90	₱ 4,717.30

12.6 Product Sales Report: -

- Admin can see the product sales report in particular report page.
- Admin can see the all product sales details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - <https://www.screencast.com/t/dWRArLri>
- **Steps: - How to see the product sales report**
 - Steps 1: - Click on report module.



- Steps 2: - Click on product sales report.



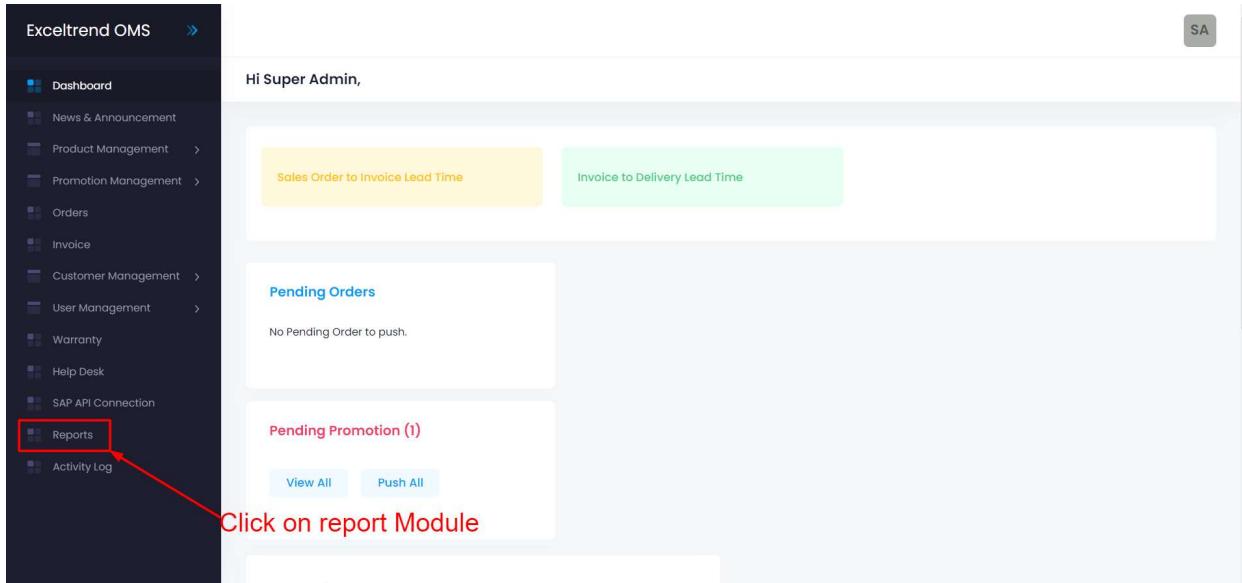
- Steps 3: - Show the all-product sales related data in listing page.

No	Product Code	Product Name	Brand	Business Unit	Total Quantity	Total Price	Total Price After VAT
1	PRI7001	***PRESA 205/45 ZR17 PS55 TL	PRESA	APBW	3	₱ 6,272.18	₱ 7,024.85
2	MXI8013	MAXXIS LT265/60 R18 8PR AT980	MAXXIS	APBW	10	₱ 8,110.00	₱ 9,083.20
3	MXI7033	MXS LT265/65 R17 8PR AT980	MAXXIS	APBW	37	₱ 24,701.43	₱ 27,665.42
4	BL20009	BIRLA 10.00-20 18PR BISON	OTHER BRANDS	APBW	1	₱ 13,548.00	₱ 15,173.76
5	MMI7030	MXS MCT 90/80 - 17 M6161 TL	MAXXIS-MCT	APBW	426	₱ 5,322.84	₱ 5,961.60
6	CMI8005	CST MCT 4.10-18 4PR C858 S	CST-MCT	APBW	45	₱ 3,955.71	₱ 4,430.40
7	CMI8012	CST MCT 4.10-18 4PR C755	CST-MCT	APBW	17	₱ 2,874.42	₱ 3,219.35
8	MMI3008	MXS MCT 140/70 - 13 VIC S98 TL	MAXXIS-MCT	APBW	30	₱ 4,718.58	₱ 5,284.80
9	MMI4009A	MXS MCT 90/80 - 14 MA-G1 TL	MAXXIS-MCT	APBW	135	₱ 5,253.85	₱ 5,884.00
10	MMI4022	MXS MCT 70/90 - 14 MAV6 TL PTM	MAXXIS-MCT	APBW	114	₱ 1,882.86	₱ 2,108.80

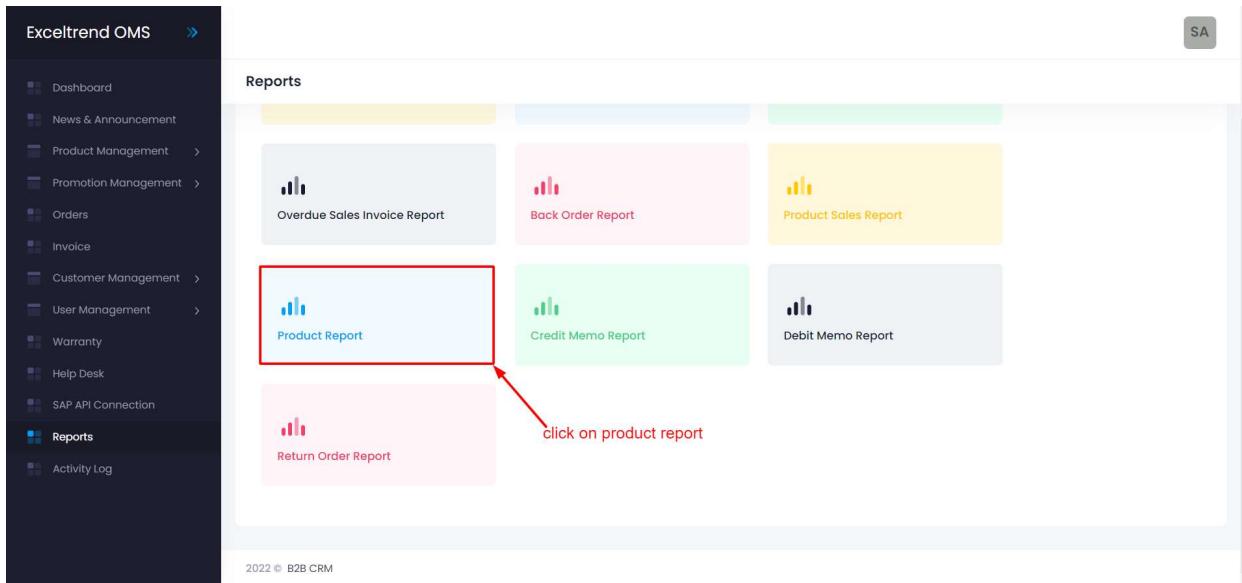
Showing 1 to 10 of 205 records

12.7 Product Report: -

- Admin can see the product report in particular report page.
- Admin can see the all-product details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - <https://www.screencast.com/t/UMgNHW8U>
- Steps: - How to see the Product Report
 - Steps 1: - Click on Report Module.



- Steps 2: - Click on Product report.



- Steps 3: - Show all product related data show in listing page.

Exceltrend OMS		SA		
Dashboard		Back		
News & Announcement				
Product Management				
Promotion Management				
Orders				
Invoice				
Customer Management				
User Management				
Warranty				
Help Desk				
SAP API Connection				
Reports				
Activity Log				
Product Reports				
Select business unit				
By Brand				
Search		Clear		
Export Excel				
No	Business Unit	Active Product	Sleeping Product	Product Movement
1	APBW	4,338	123	3,203
2	NTMC	1,920	1,609	1,419
3	PHILCREST	85	1,540	12
4	PHILSYN	289	1,585	935
5	SOLID TREND	0	0	0
10	Showing 1 to 5 of 5 records	<	1	>

12.8 Credit Memo Report: -

- Admin can see the credit memo report in particular report page.
 - Admin can see the all-credit memo details in this report.
 - Admin can use the different-different filter and filter the data.
 - Admin can export the report data.
 - Video Link: - <https://www.screencast.com/t/KWjx590Q>
 - **Steps: - How to see the Credit Memo Report**
 - Steps 1: - Click on Report Module.

The screenshot shows the Exceltrend OMS application interface. The top navigation bar includes the brand name "Exceltrend OMS" and a user profile icon labeled "SA". The left sidebar lists various modules: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, Reports (which is highlighted with a red box and has a red arrow pointing to it from the bottom), and Activity Log. The main content area displays a greeting "Hi Super Admin," followed by two cards: "Sales Order to Invoice Lead Time" (yellow background) and "Invoice to Delivery Lead Time" (green background). Below these is a section titled "Pending Orders" with the message "No Pending Order to push." At the bottom, there is a section titled "Pending Promotion (1)" with "View All" and "Push All" buttons. A large red arrow at the bottom points to the "Reports" module in the sidebar.

- Steps 2: - Click on Credit memo report.

The screenshot shows the 'Reports' section of the Exceltrend OMS. It displays several report cards: Promotions Report (yellow), Sales Report (light blue), Sales Order Report (light green), Overdue Sales Invoice Report (grey), Back Order Report (pink), Product Sales Report (yellow), Product Report (light blue), Credit Memo Report (highlighted with a red border and a red arrow pointing to it), Debit Memo Report (grey), and Return Order Report (pink). A red arrow at the bottom indicates where to click on the Credit Memo Report.

- Steps 3: - Show all credit memo related data show in listing page.

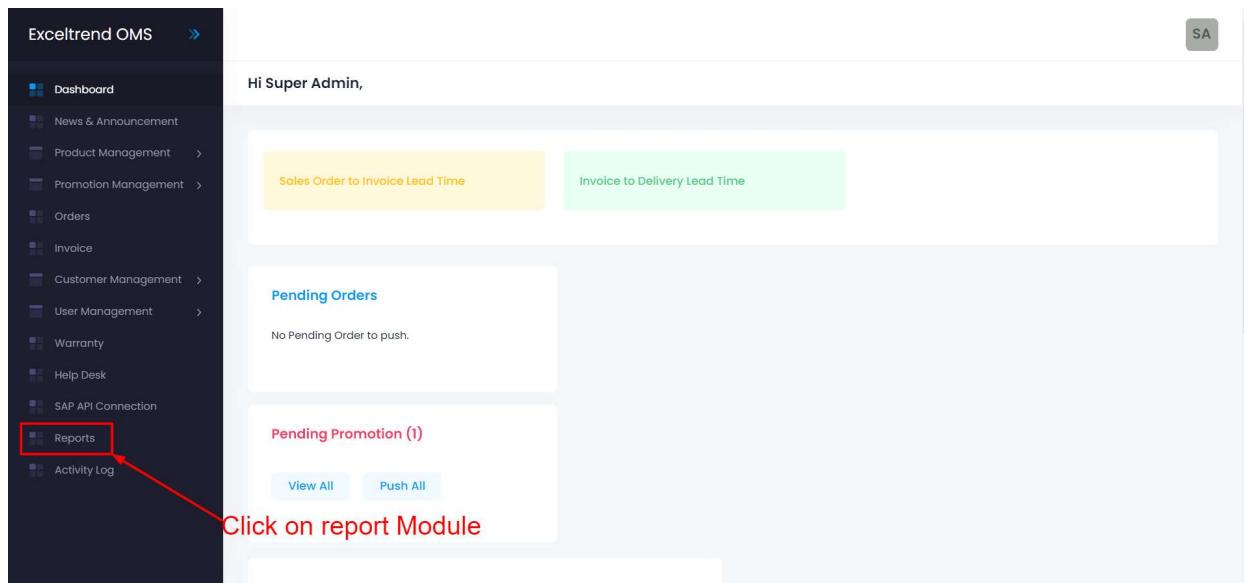
The screenshot shows the 'Credit Memo Report' listing page. At the top, there are search filters for 'Select business unit', 'Select customer', a 'Search' button, a 'Clear' button, and an 'Export Excel' button. Below the filters is a table titled 'List Of Records' with the following columns: No, Customer Code, Customer Name, Business Unit, Open Amount, and Used Amount. The table contains 10 records:

No	Customer Code	Customer Name	Business Unit	Open Amount	Used Amount
1	CI278I	SOUTH TIRE CENTRAL	NTMC	₱ 10,000.00	₱ 0.00
2	CI2427	CMG MINERVA TYRE GALLERY-VERSAILLES, INC.	NTMC	₱ 0.00	₱ 3,605.00
3	CI2483	SVB TIRE AND CAR ACCESSORIES	NTMC	₱ 0.00	₱ 16,809.82
4	CI3344	D. BARROSO VEHICLE TIRES AND BATTERIES TRADING	NTMC	₱ 0.00	₱ 20,900.00
5	CI3722	ROADKING DISTRIBUTION INC.	NTMC	₱ 23,326.44	₱ 4,923.11
6	CI2424	TRAILBOSS AUTOWORKS ENT.	NTMC	₱ 0.00	₱ 27,875.00
7	C02300A	MSE MINERVA TIRE HAUS, INC.	NTMC	₱ 0.00	₱ 48,770.00
8	C05737B	TREND PERFORMANCE CENTRUM INC. - MANILA	NTMC	₱ 3,696.48	₱ 37,957.42
9	CI3728	3 J MARKETING	NTMC	₱ 0.00	₱ 84,297.31
10	CI2425A	ICONIC DEALERSHIP, INC.	NTMC	₱ 0.00	₱ 147.86

At the bottom, it says 'Showing 1 to 10 of 664 records' with a page navigation bar.

12.9 Debit Memo Report: -

- Admin can see the product report in particular report page.
- Admin can see the all-product details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report.
- Video Link: - <https://www.screencast.com/t/J9CCvKUI>
- **Steps: - How to see the Product Report**
 - Steps 1: - Click on Report Module.



- Steps 2: - Click on Debit Memo report.

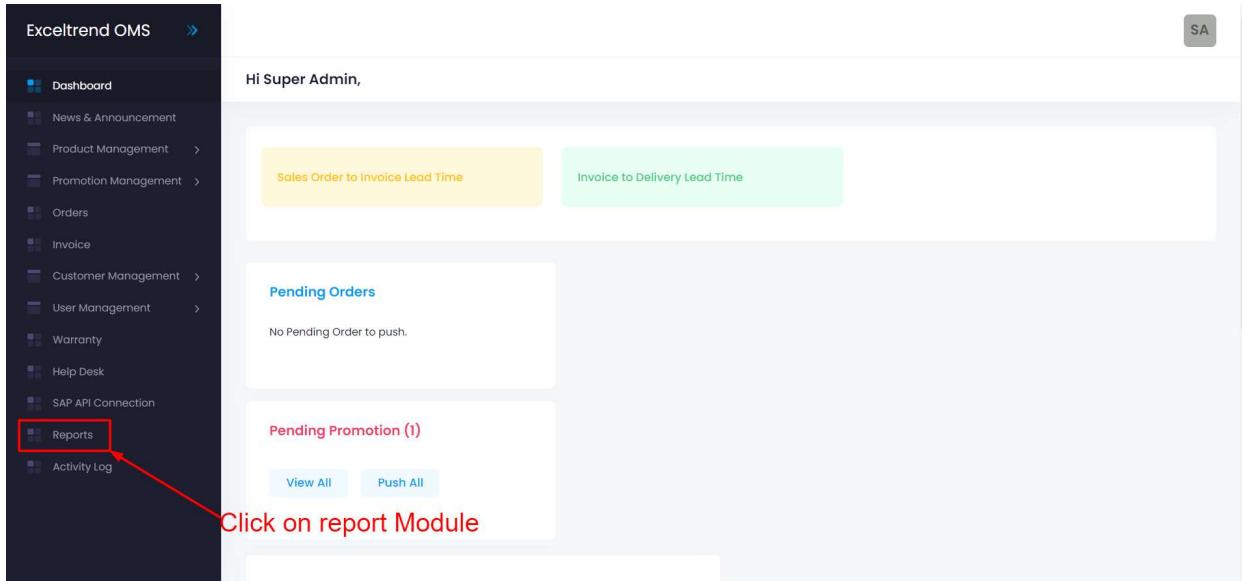


- Steps 3: - Show all debit memo related data show in listing page.

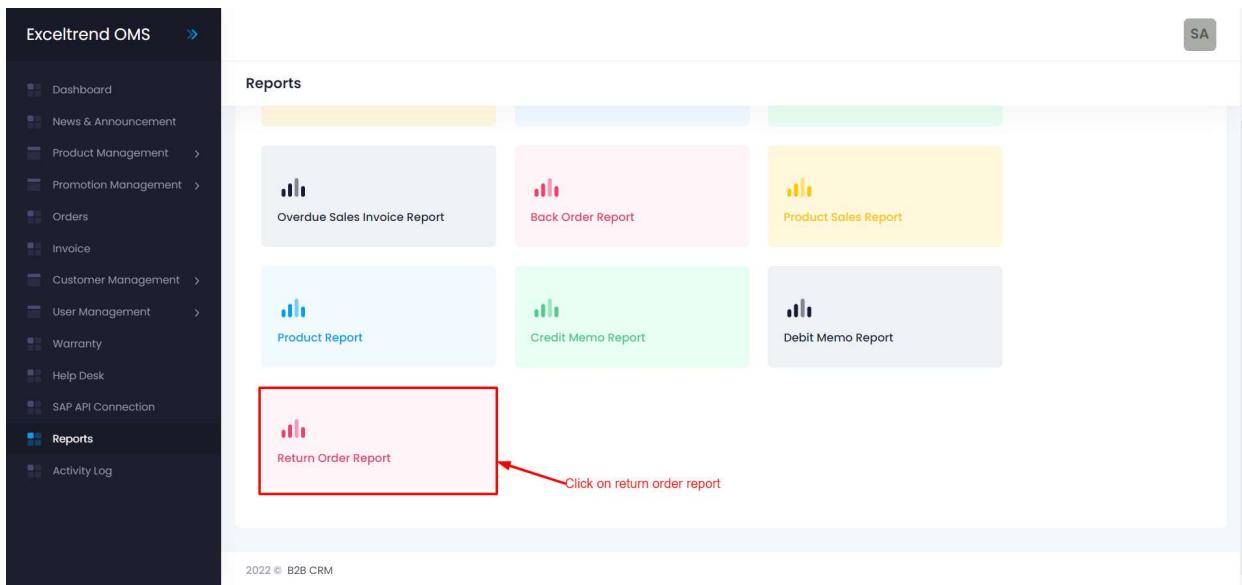
No	Customer Code	Customer Name	Business Unit	Open Amount	Used Amount
1	CI3842	BRYANT MILLING & MARKETING	NTMC	P -2,250.00	P 0.00
2	CI2605	TOMAS CAR ACCESSORIES	APBW	P -349.28	P 0.00

12.10 Return Order Report: -

- Admin can see the return order report in particular report page.
- Admin can see the all-return order details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - <https://www.screencast.com/t/QyFpAFP0>
- **Steps: - How to see the Product Report**
 - Steps 1: - Click on Report Module.



- Steps 2: - Click on Return Order report.



- Steps 3: - Show all return related data show in listing page.

The screenshot shows the Exceltrend OMS system interface. On the left is a dark sidebar menu with various management options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, Reports, and Activity Log. The main area is titled "Return Order Report". It features search fields for "Select business unit" and "Select customer", a "Search" button, a "Clear" button, and a "Export Excel" button. Below these is a table titled "List Of Records" with columns: No, Doc #, Customer Code, Customer Name, Business Unit, Total Quantity, Total Amount, and Date. The table lists 10 records from 1 to 10, showing details for various companies like MGA.414 CORPORATION, SMC CONSOLIDATED POWER CORPORATION, MANABAT TRADING CORPORATION, etc. At the bottom, there's a pagination control showing page 1 of 284.

No	Doc #	Customer Code	Customer Name	Business Unit	Total Quantity	Total Amount	Date
1	4659	C05379	MGA.414 CORPORATION	NTMC	1	₱ 4,589.77	Feb 26, 2022
2	4661	C12922	SMC CONSOLIDATED POWER CORPORATION	NTMC	4	₱ 42,000.00	Feb 26, 2022
3	17905	C03727	MANABAT TRADING CORPORATION	APBW	1	₱ 0.00	Feb 24, 2022
4	17904	C01947	DIN EIGHTY EIGHT MARKETING	APBW	1	₱ 0.00	Feb 24, 2022
5	17901	C06763	JOVAS MARKETING	APBW	1	₱ 0.00	Feb 23, 2022
6	17902	C06763	JOVAS MARKETING	APBW	1	₱ 0.00	Feb 23, 2022
7	4651	C13745A	HARBORAGE HANDLING SERVICES SPECIALISTS, INC.	NTMC	3	₱ 74,000.00	Feb 23, 2022
8	17903	C11467	CELCIUS MERCHANDISING & AUTO PART SUPPLY	APBW	34	₱ 392,041.75	Feb 22, 2022
9	4634	C10158	COMETZ II TRADING	NTMC	4	₱ 13,240.00	Feb 22, 2022
10	4635	C13813	GDRM CAR CARE CENTER	NTMC	4	₱ 13,960.00	Feb 22, 2022

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