OMS ERM System

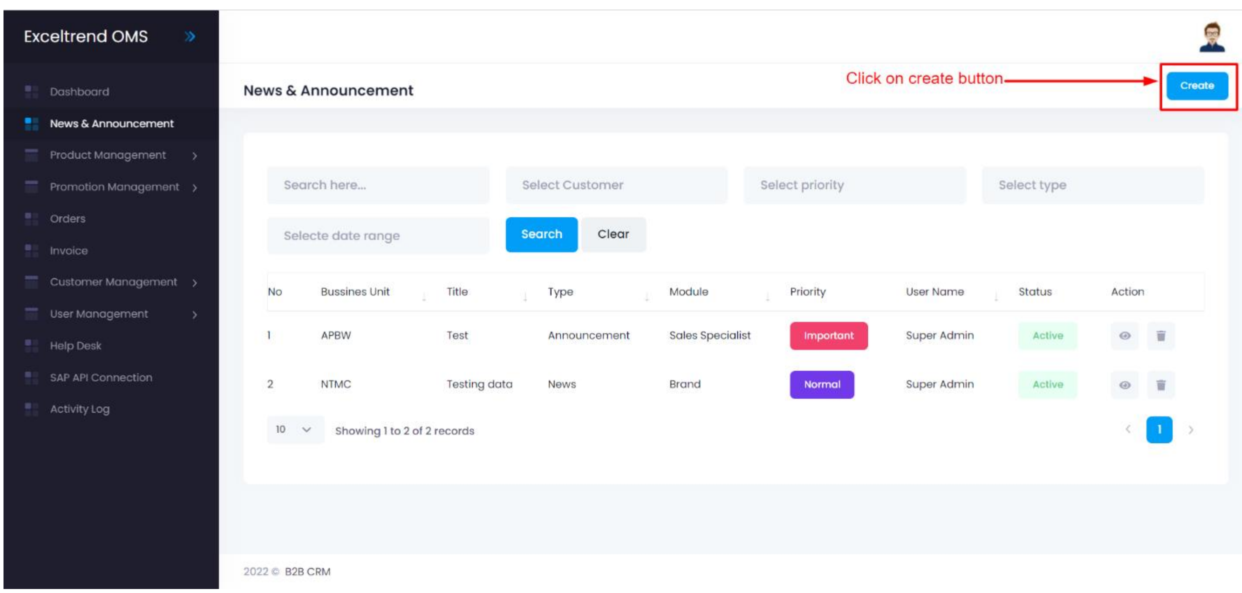
Project Link: - http://demoo-manekserver.tk/north-trend-crm/public/login

1. News & Announcement Module: -

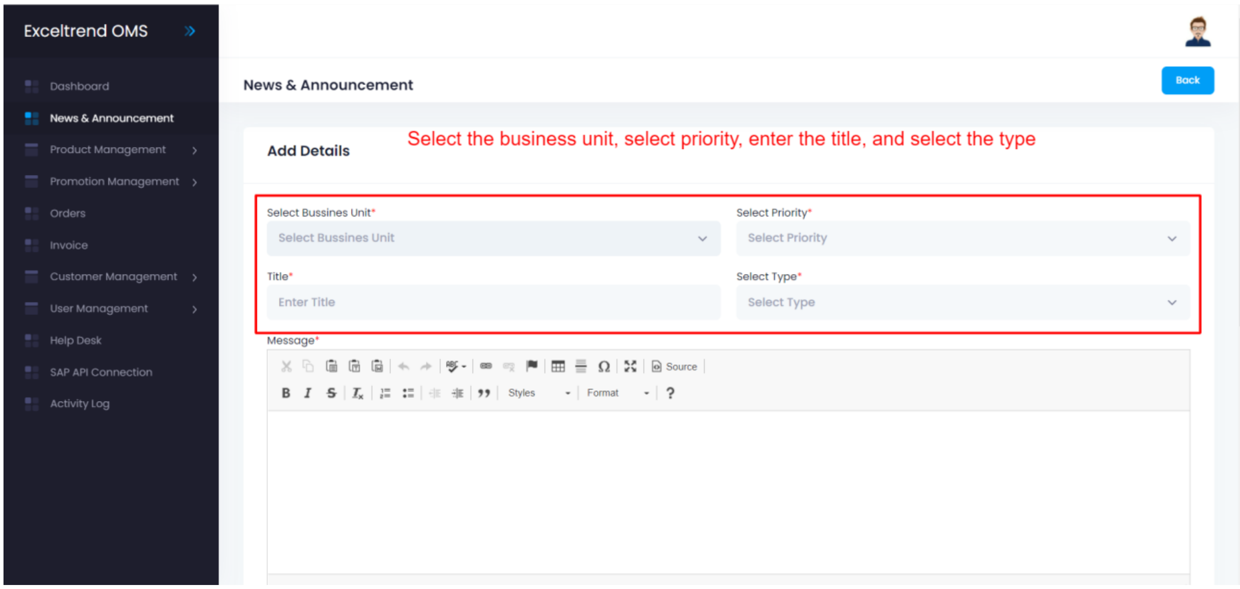
- Admin can create, edit, update, and delete the news and announcement.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Video Link: - https://www.screencast.com/t/5opHpDfRg3

1.1 Steps: - How to create a new news and announcement.

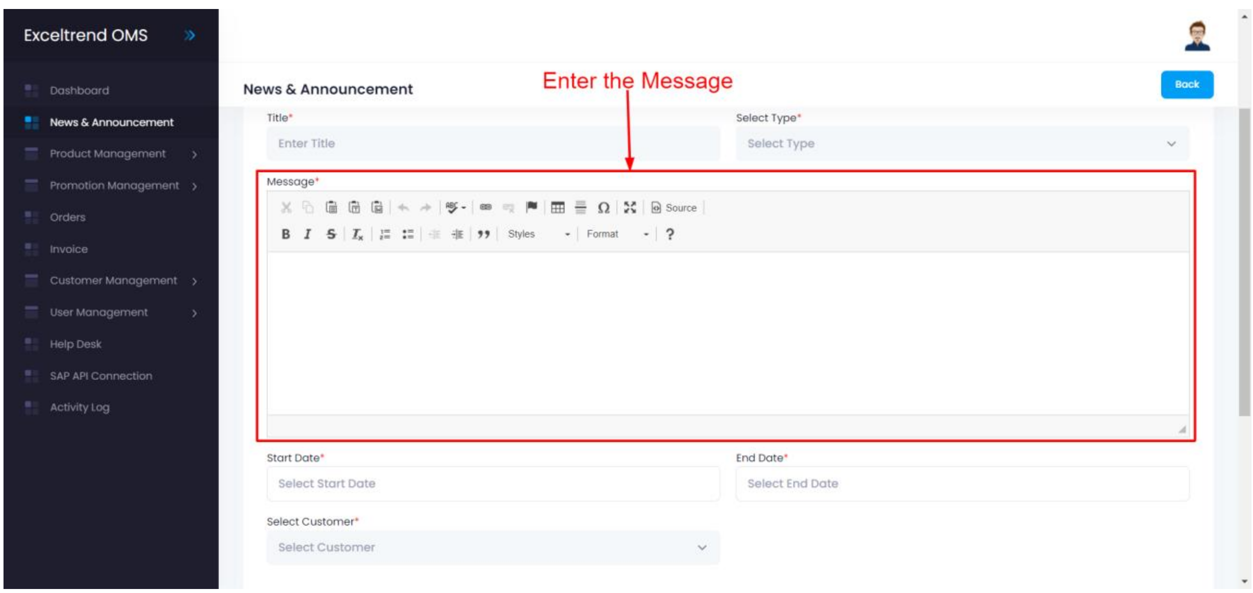
- Step 1: - Click on create button.



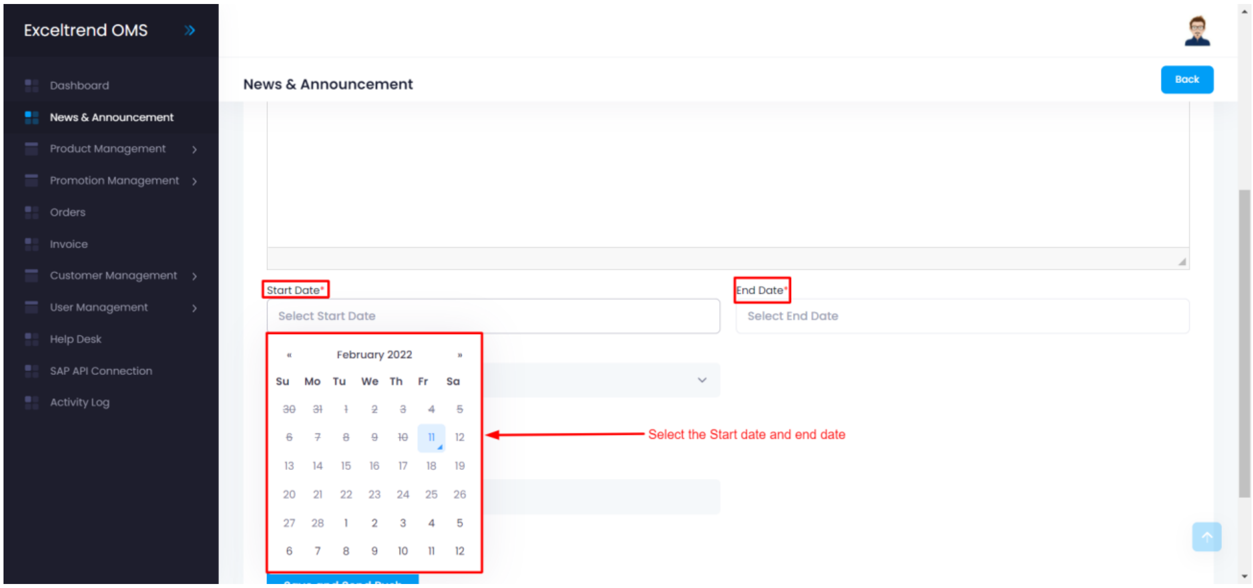
- Step 2: - Select the business unit, select priority, enter the title, and select the type.



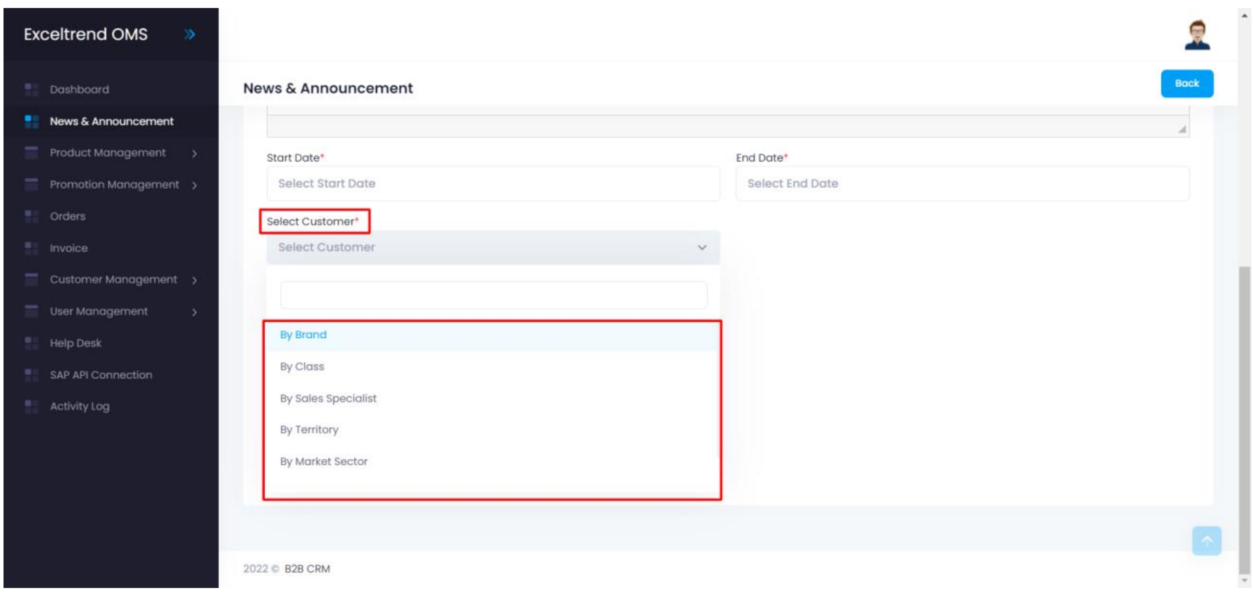
- Step 3: - Enter the Message.

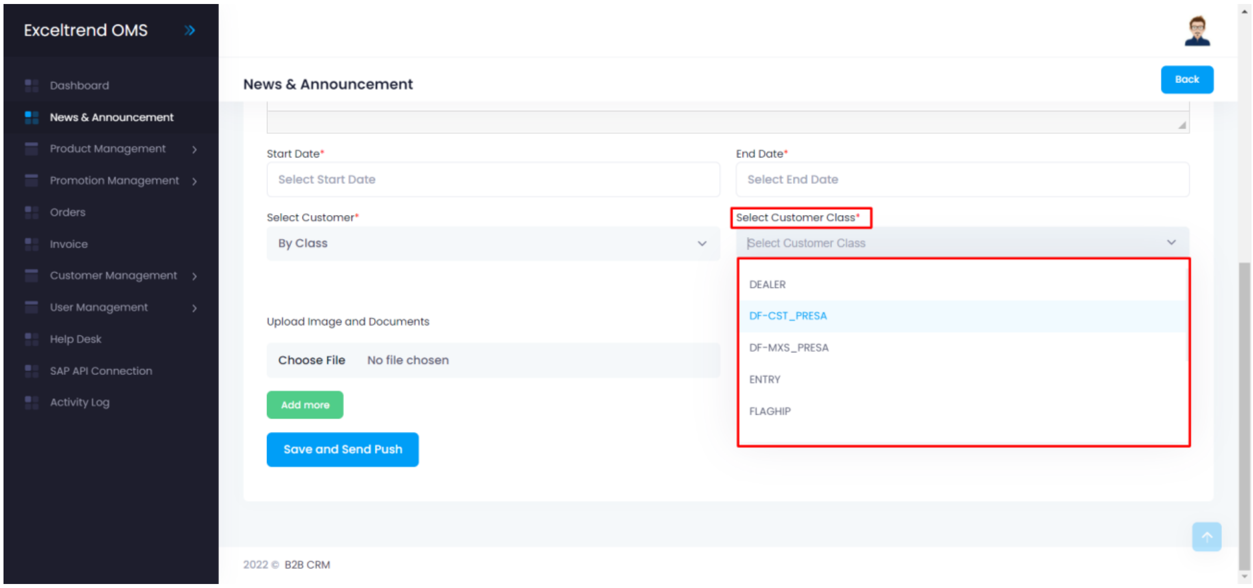


- Step 4: - Select the Start date and end date.

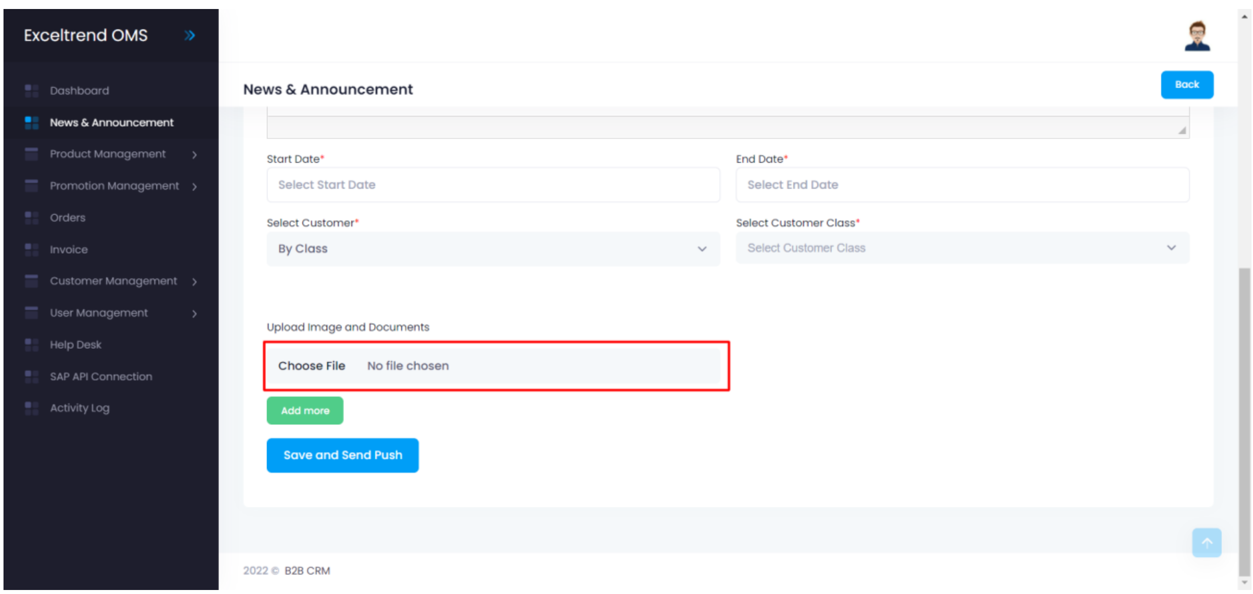


- Step 5: - Select the customer and that according show second dropdown and select the data.

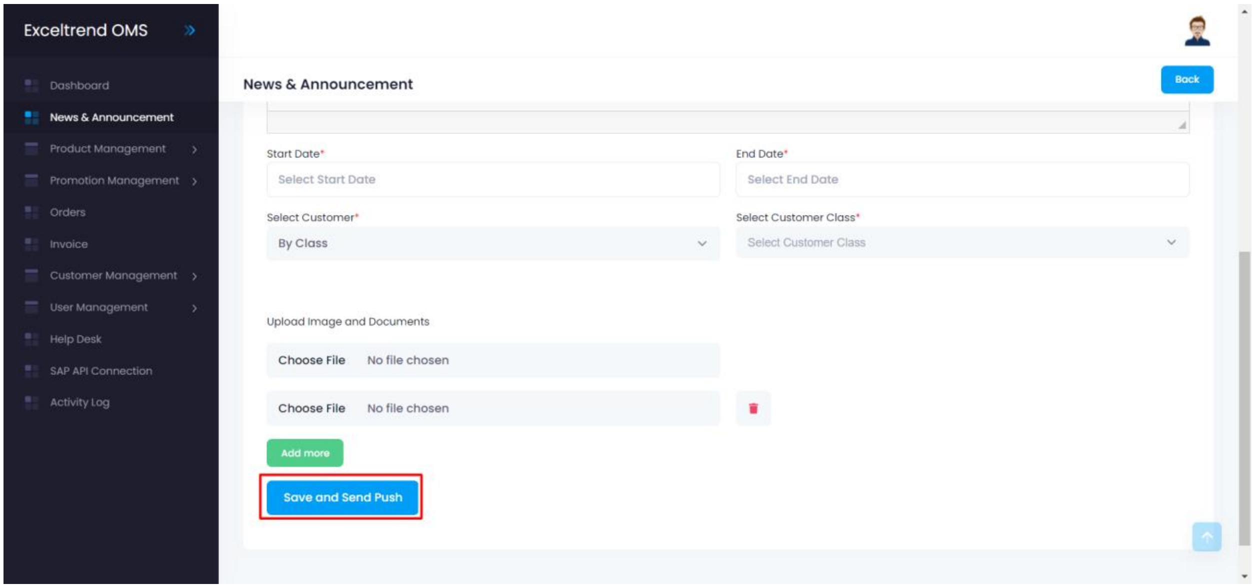




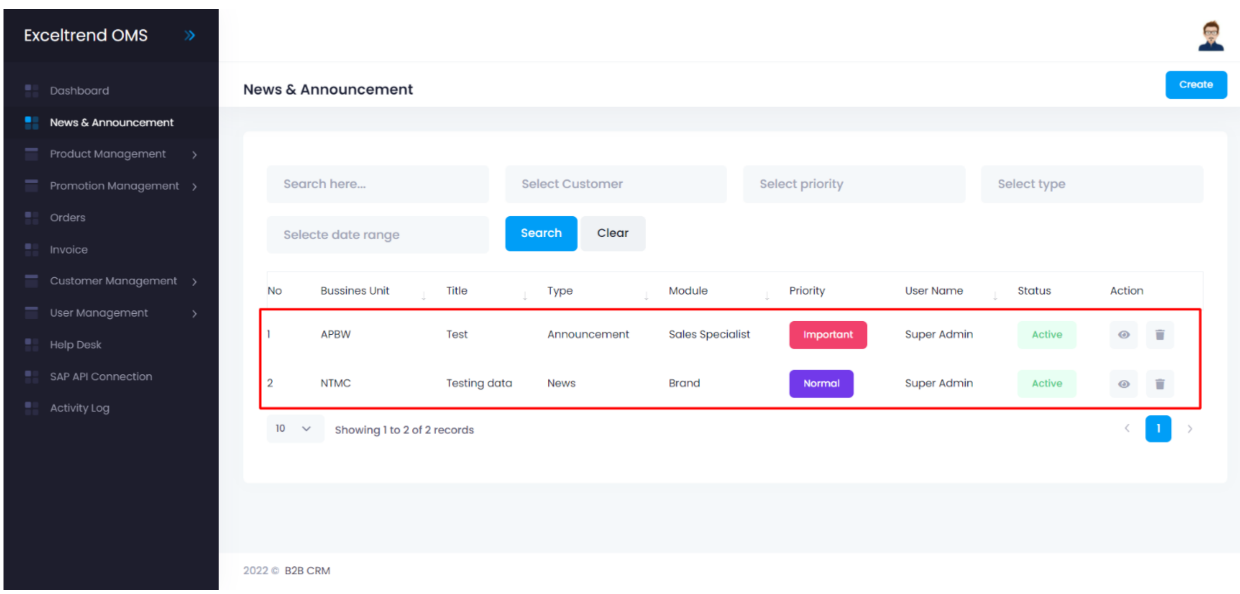
- Step 6: - Upload the image and document and click on add more button you can add multiple image and document upload.



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

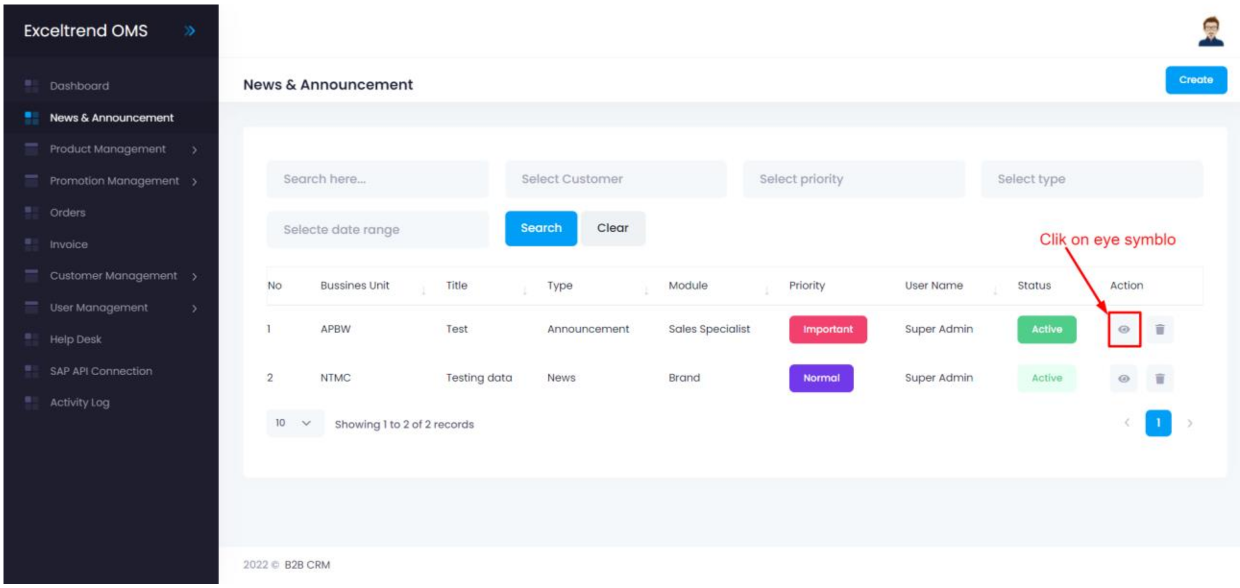


- Step 8: - Created News & Announcement show in listing page.

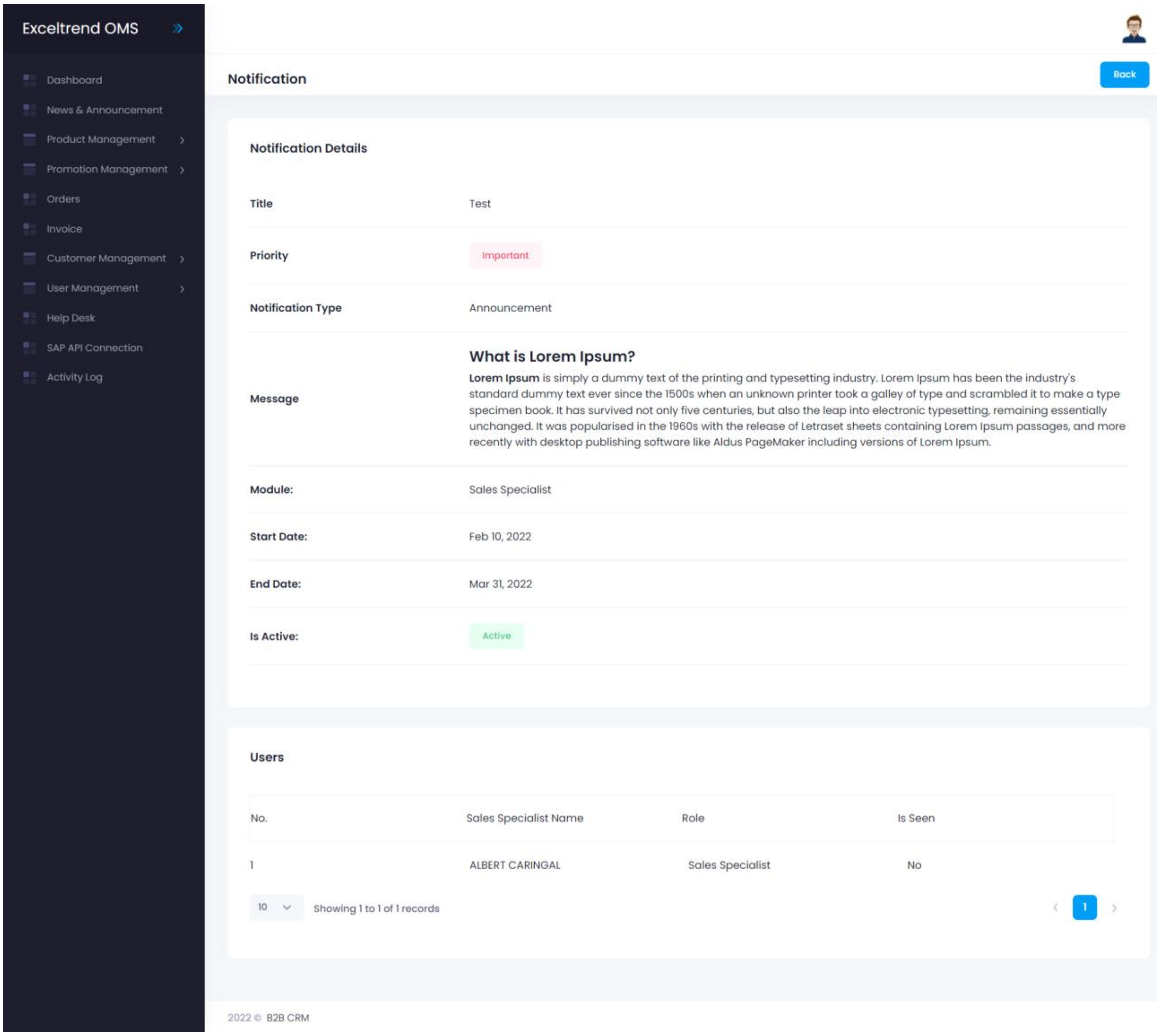


1.2 Steps: - How to view the news and announcement.

- Steps 1: - Click on eye icon button.

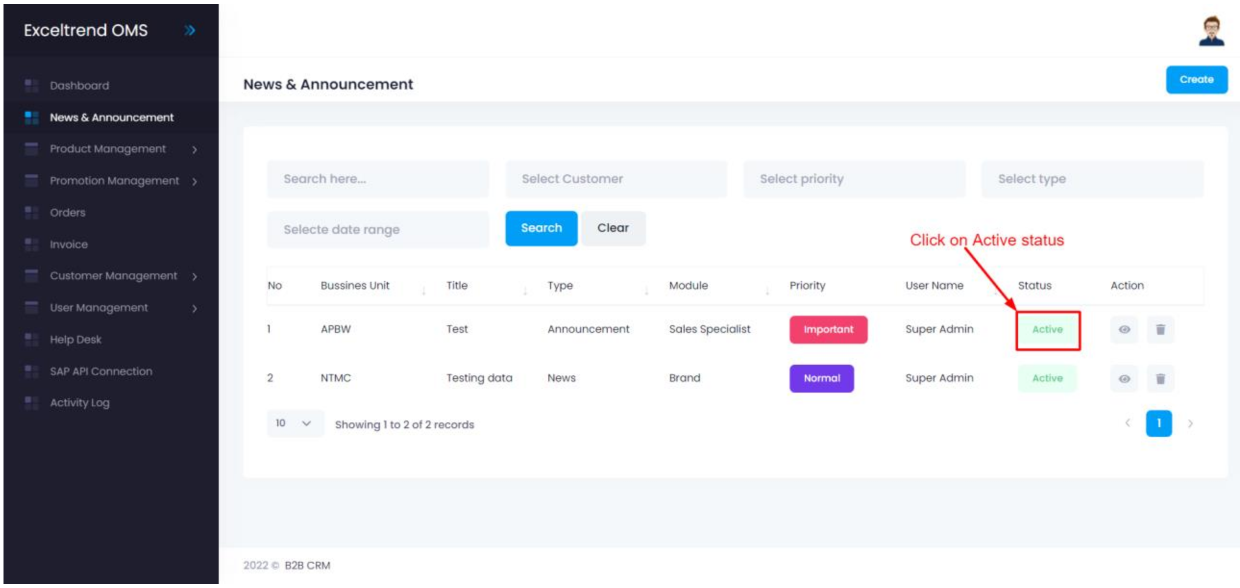


- Steps 2: - News and announcement all details show and news and announcement details page.

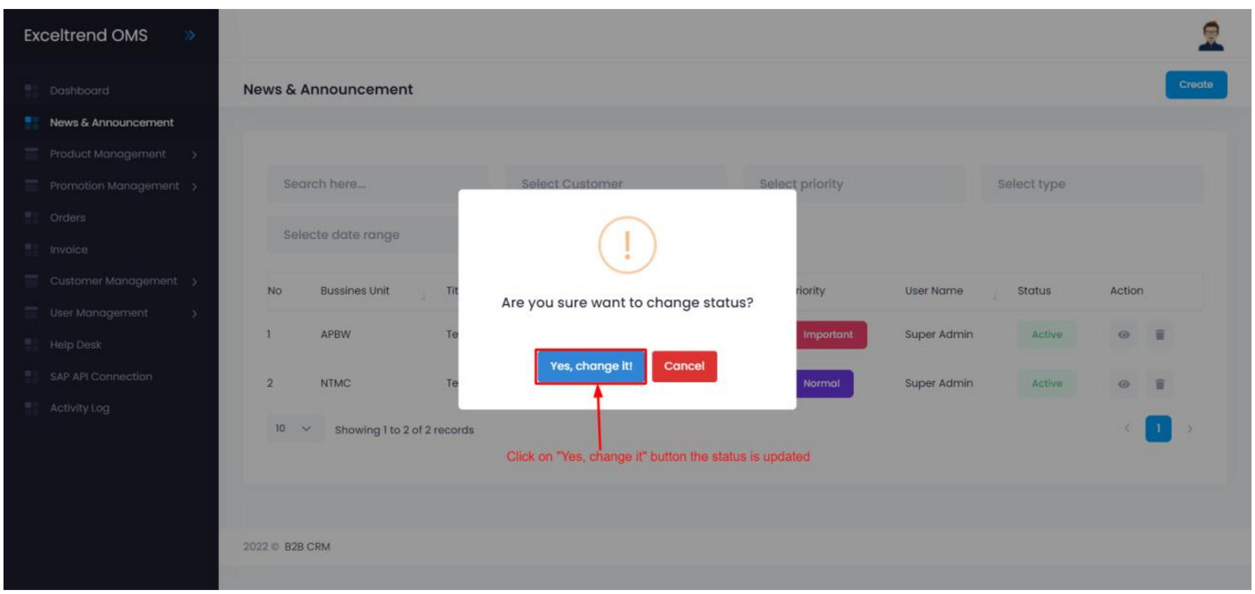


1.3 Steps: - How active and inactive the news and announcement.

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



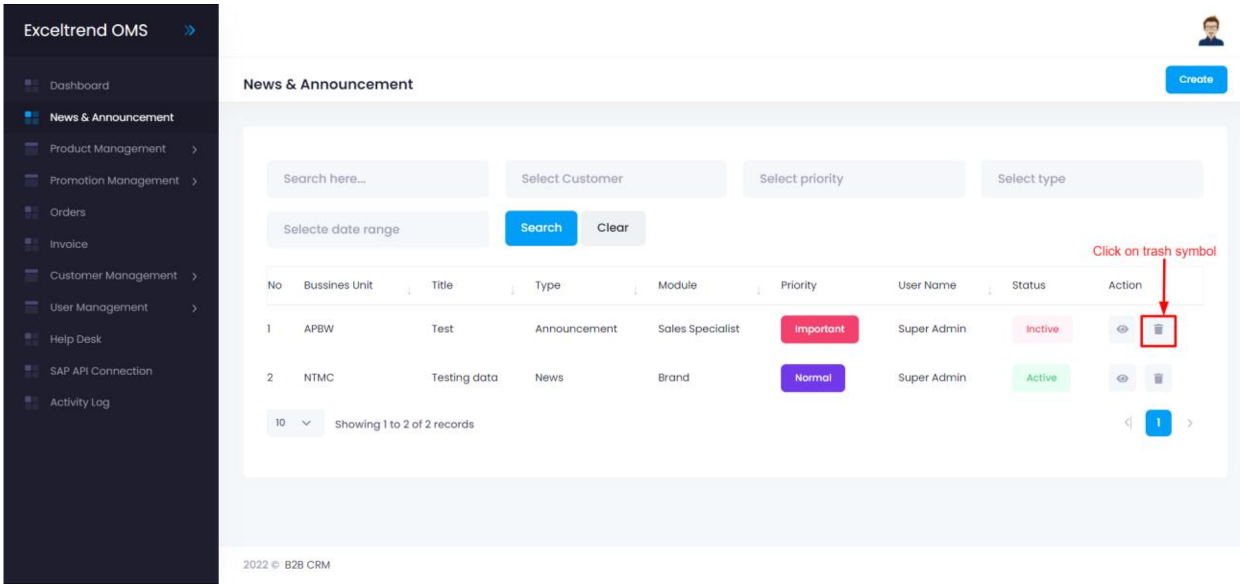
- Steps 2: - Pop-up model appear and show message "Are you sure want to change status?" and you click on "Yes, change it" button the news and announcement status change.



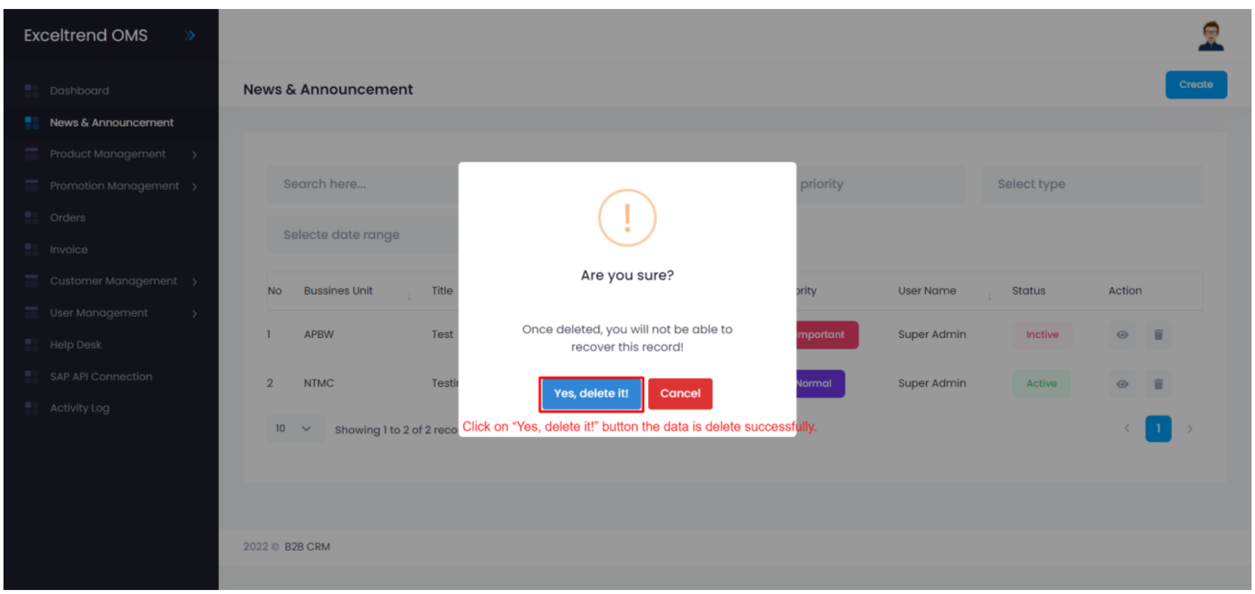
- Steps 3: - Update status show in listing page.

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

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



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



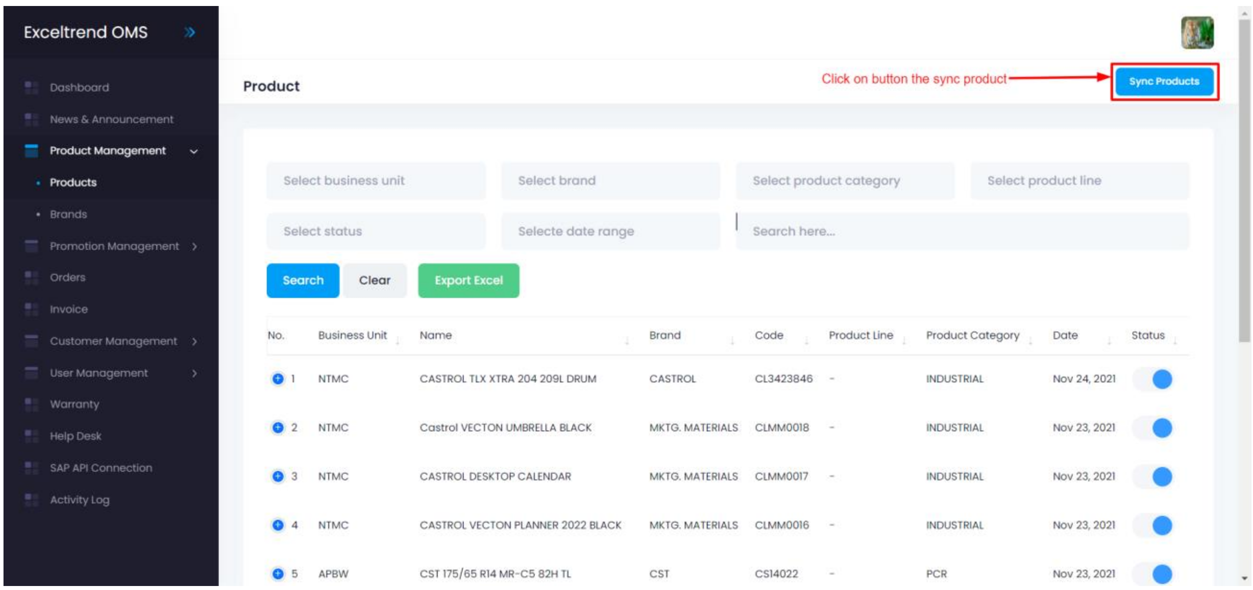
2. Product Management Module: -

- There are three sub modules in this module.
  - Product
  - Product Tagging
  - Brand
- Admin can sync the data product and product brand over here.

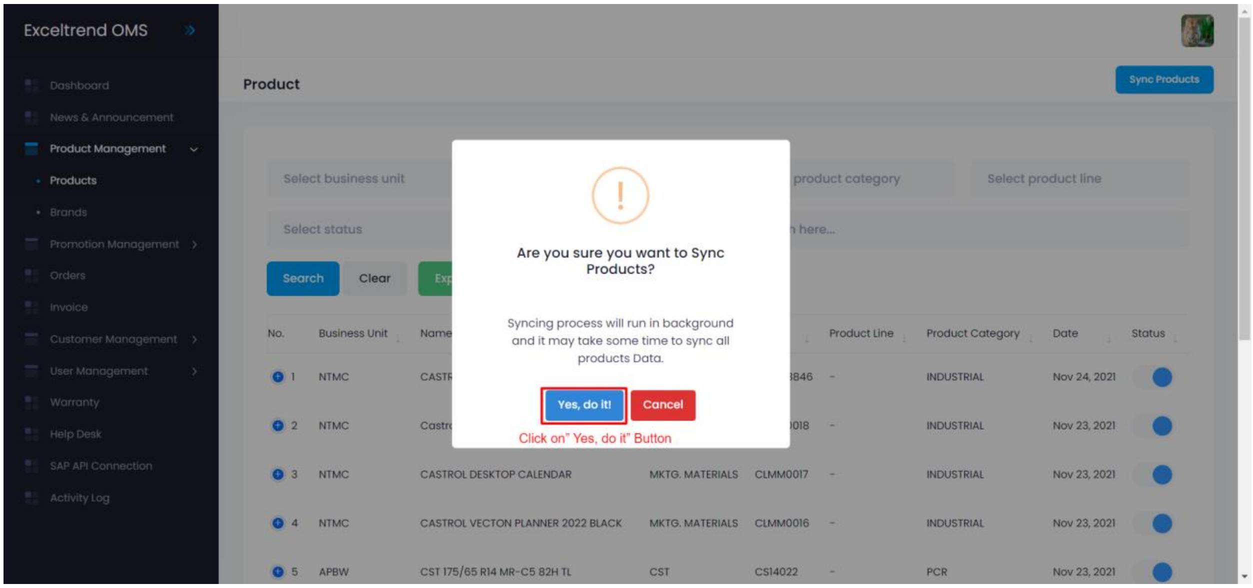
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Admin can export the product data.
- Video Link: - https://www.screencast.com/t/s7xwra9F9q

2.1 Steps: - How to sync the product.

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

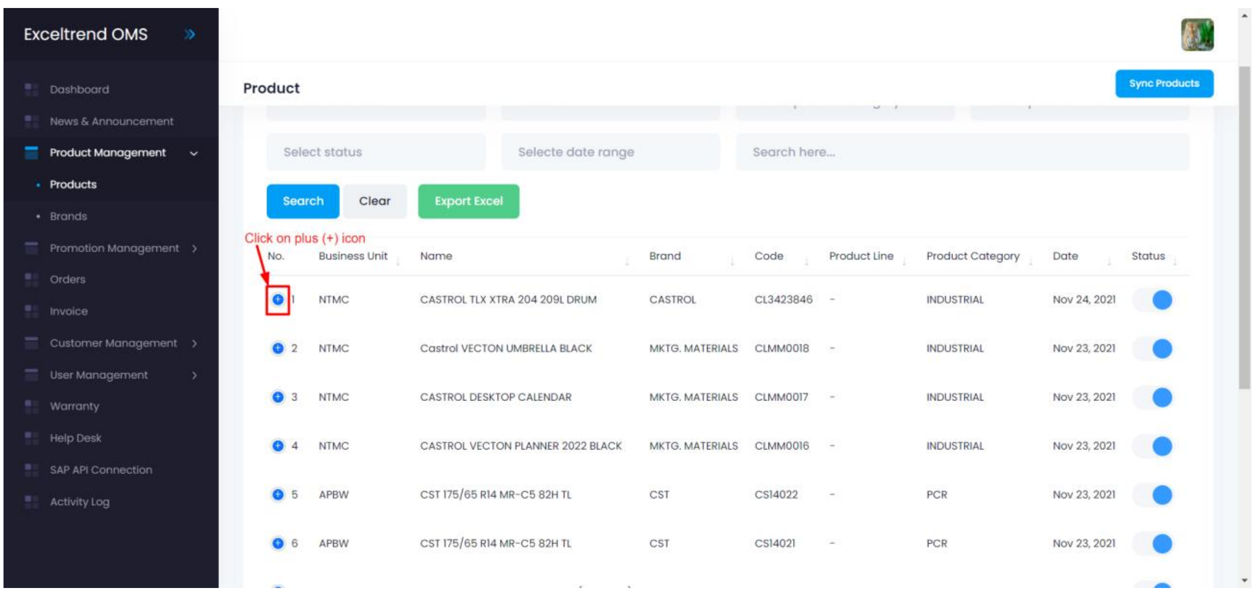


- Steps 2: - Pop-up model appear and show message “Are you sure you want to sync Products?” and click on “Yes, do it” button that time loader should be load after the message displayed sync product successfully.



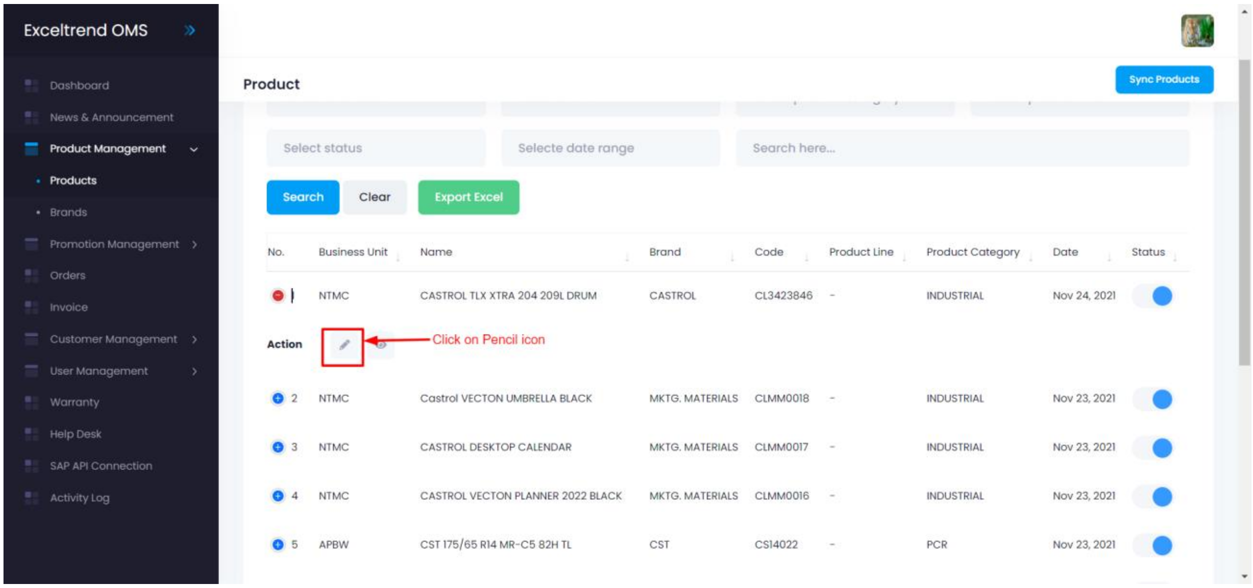
2.2 Steps: - How to edit the product.

- Steps 1: - Click on plus (+) icon.

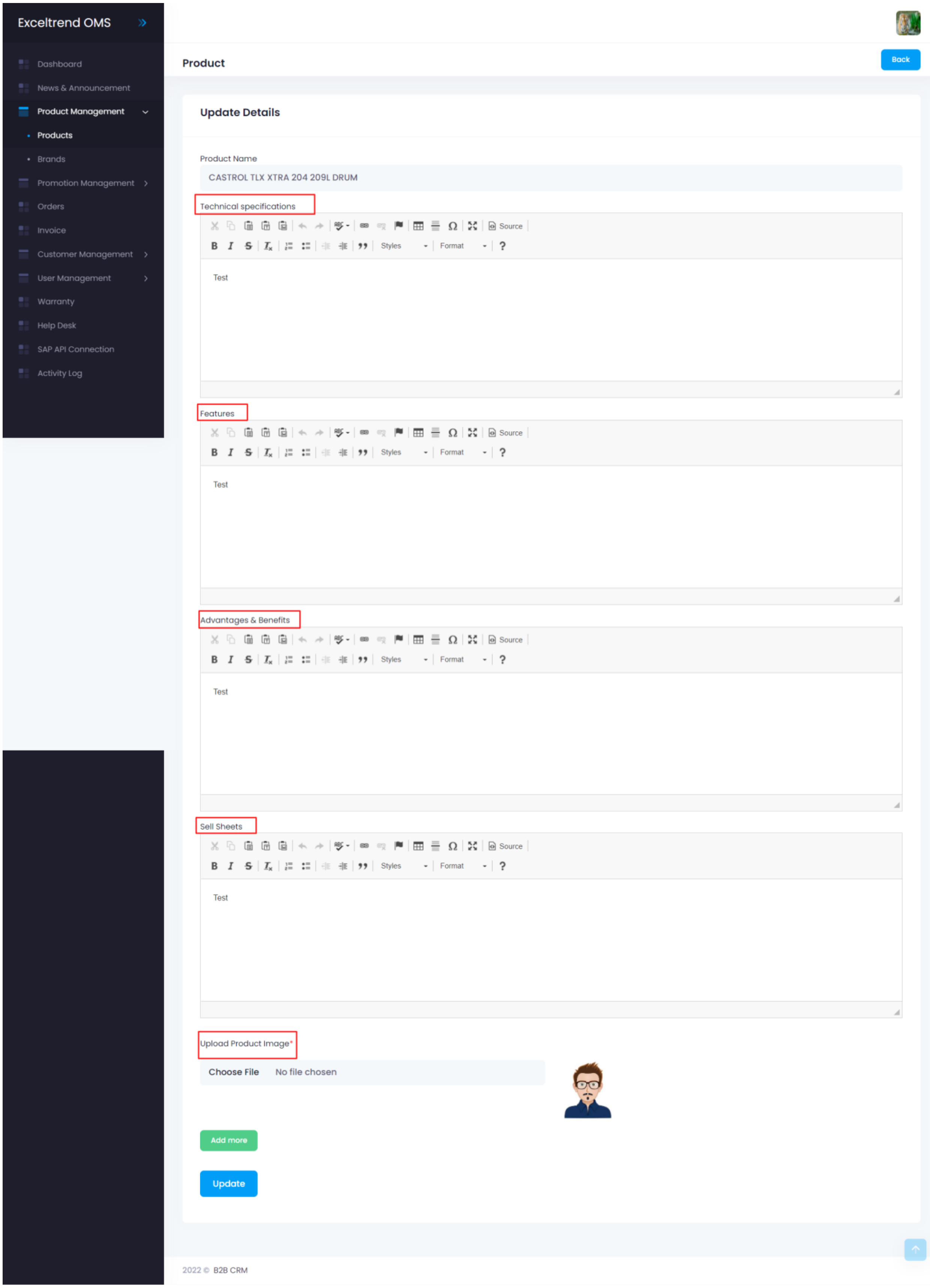


No.	Business Unit	Name	Brand	Code	Product Line	Product Category	Date	Status
1	NTMC	CASTROL TLX XTRA 204 209L DRUM	CASTROL	CL3423846	-	INDUSTRIAL	Nov 24, 2021	
2	NTMC	Castrol VECTON UMBRELLA BLACK	MKTG. MATERIALS	CLMM0018	-	INDUSTRIAL	Nov 23, 2021	
3	NTMC	CASTROL DESKTOP CALENDAR	MKTG. MATERIALS	CLMM0017	-	INDUSTRIAL	Nov 23, 2021	
4	NTMC	CASTROL VECTON PLANNER 2022 BLACK	MKTG. MATERIALS	CLMM0016	-	INDUSTRIAL	Nov 23, 2021	
5	APBW	CST 175/65 R14 MR-C5 82H TL	CST	CS14022	-	PCR	Nov 23, 2021	
6	APBW	CST 175/65 R14 MR-C5 82H TL	CST	CS14021	-	PCR	Nov 23, 2021	

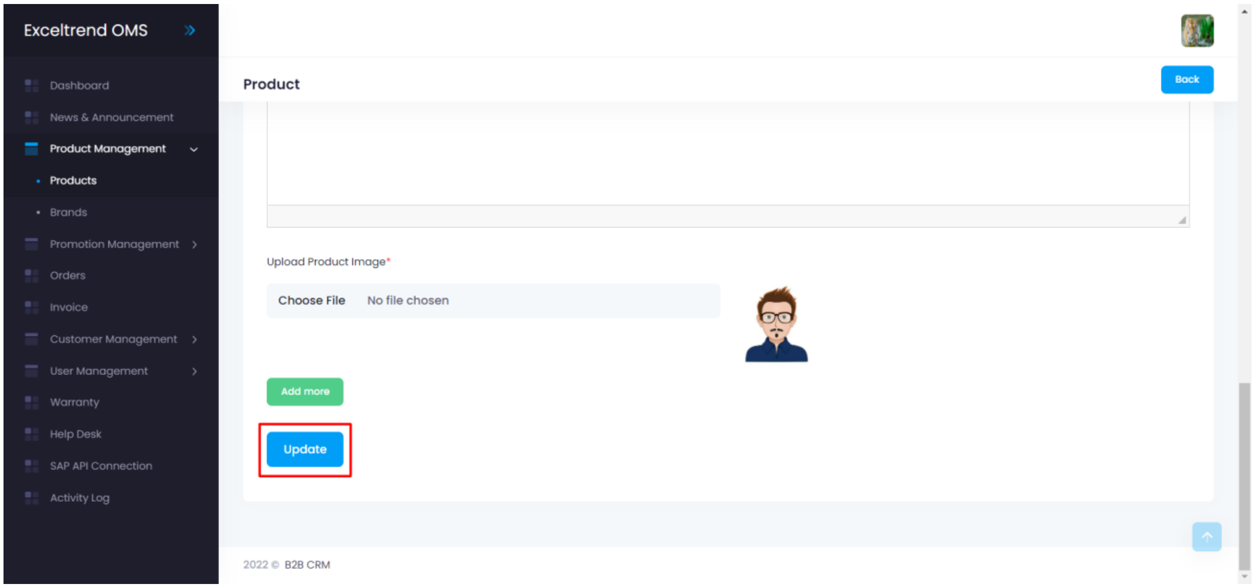
- Steps 2: - Click on Pencil icon.



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

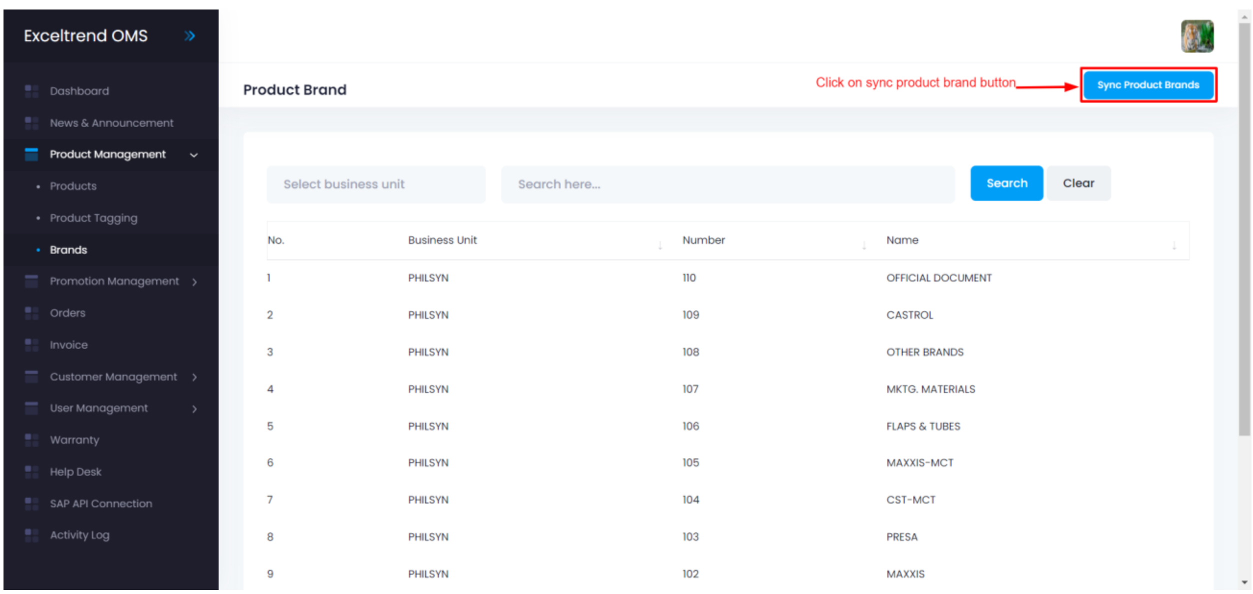

Exceltrend OMS
Dashboard
News & Announcement
Product Management
Products
Brands
Promotion Management
Orders
Invoice
Customer Management
User Management
Warranty
Help Desk
SAP API Connection
Activity Log
Product
Back
Update Details
Product Name
CASTROL TLX XTRA 204 209L DRUM
Technical specifications
Source
Styles
Format
Test
Features
Source
Styles
Format
Test
Advantages & Benefits
Source
Styles
Format
Test
Sell Sheets
Source
Styles
Format
Test
Upload Product Image*
Choose File
No file chosen
Add more
Update
2022 © B2B CRM

- Steps 4: -Click on Upload button.

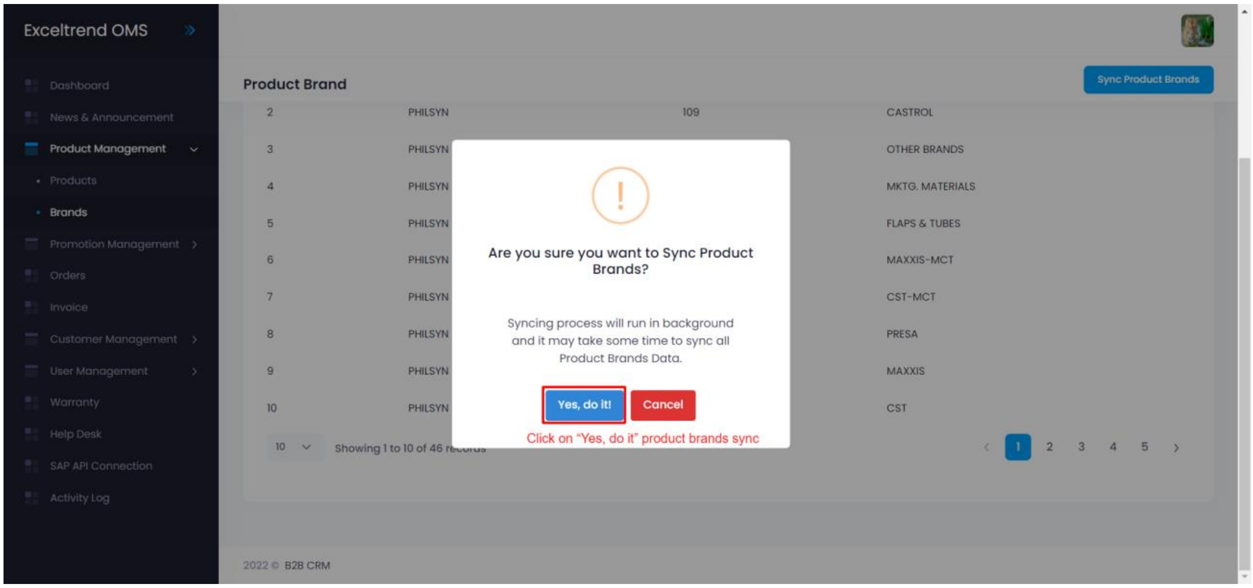


2.3 Steps: - How to sync the product Brands.

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



- 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: -

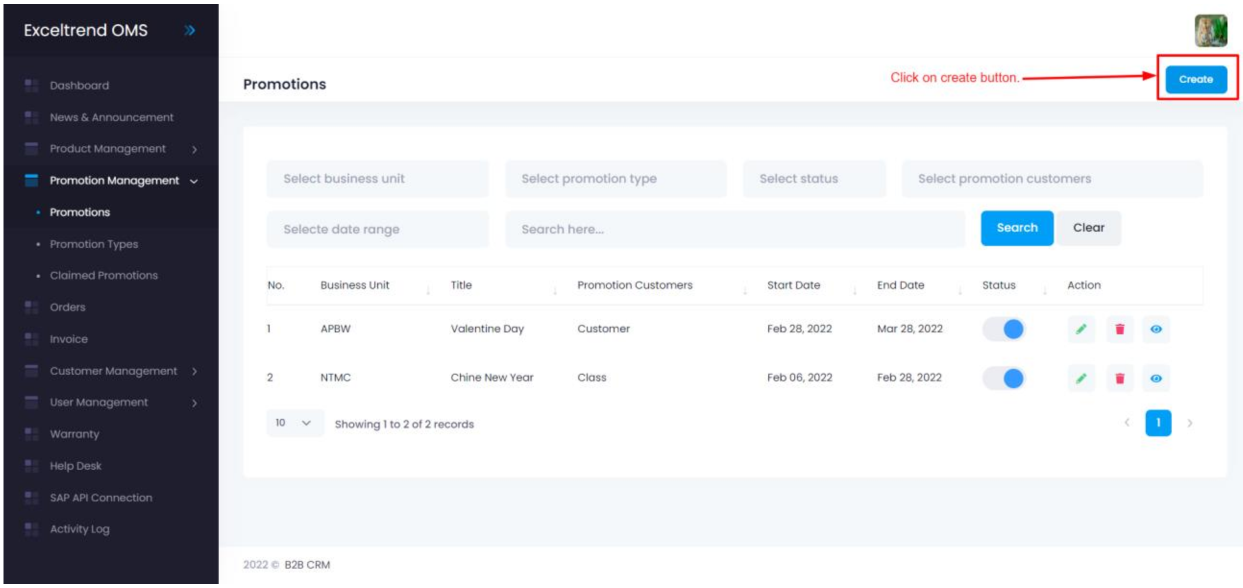
- There are three sub modules in this module and all modules explain in details one by one.
  - Promotion
  - Promotion Types
  - Claimed Promotions

3.1 Promotion Module: -

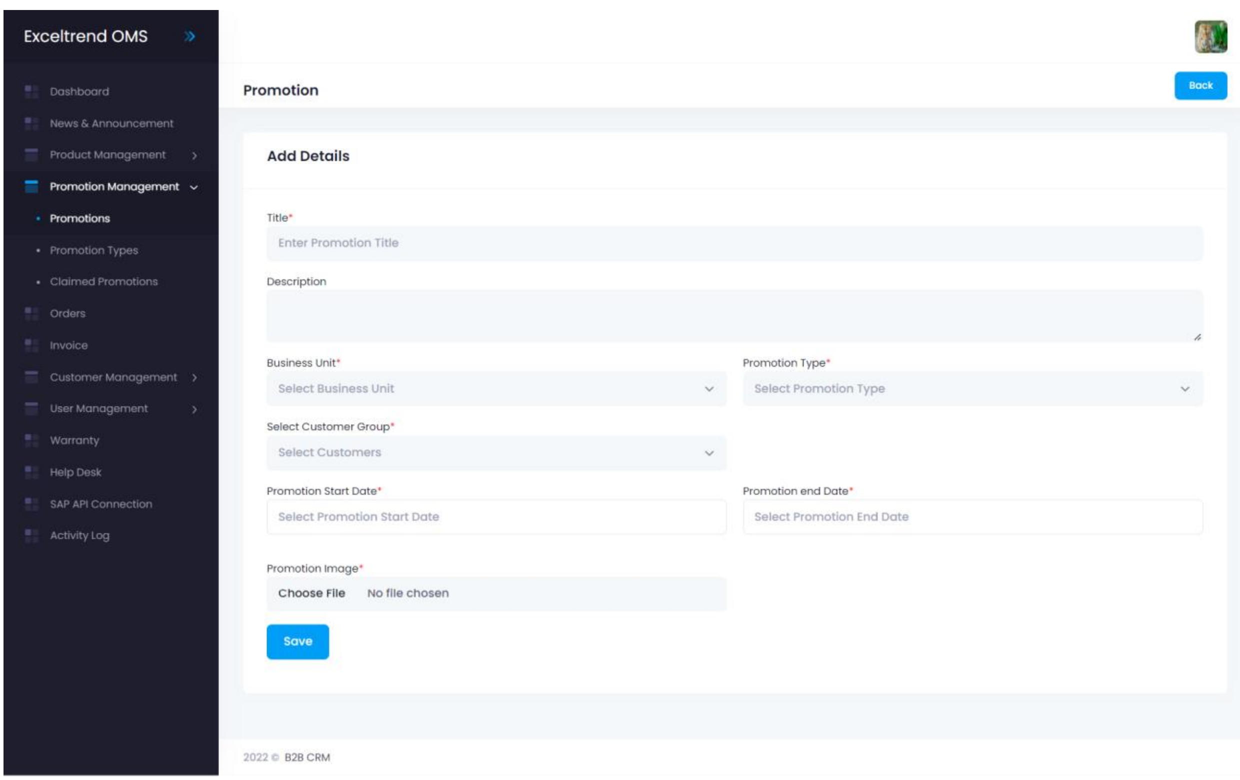
- Admin can create, edit, update, delete, active and inactive the promotion.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Video Link: - https://www.screencast.com/t/6ezY1lQfIi

3.1.1 Steps: - How to create a new promotion.

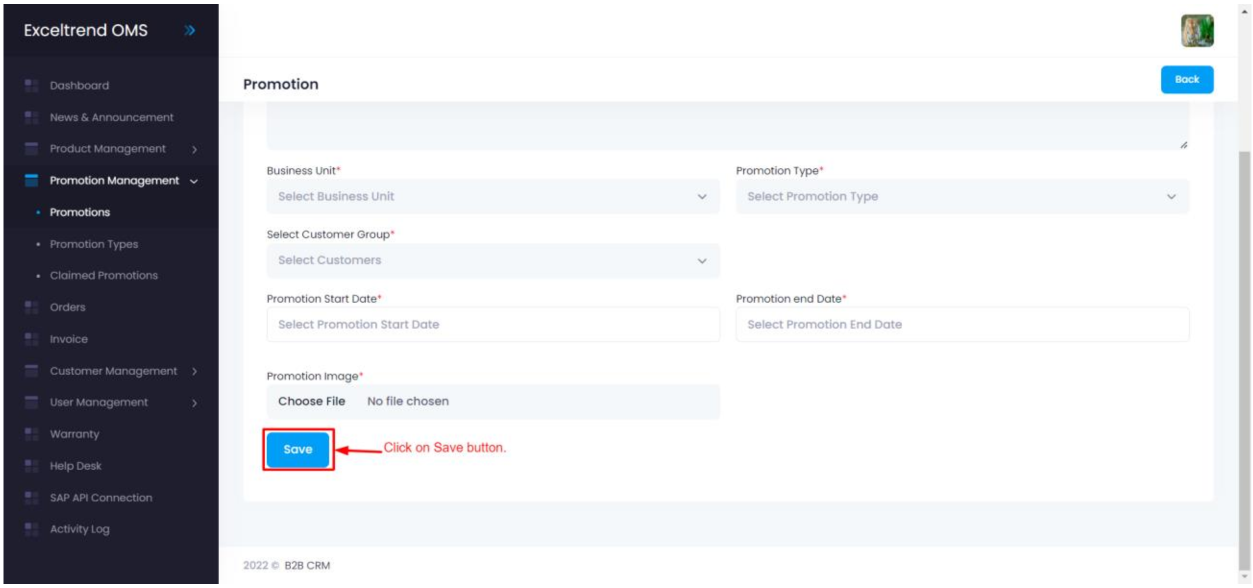
- Steps 1: - Click on create button.



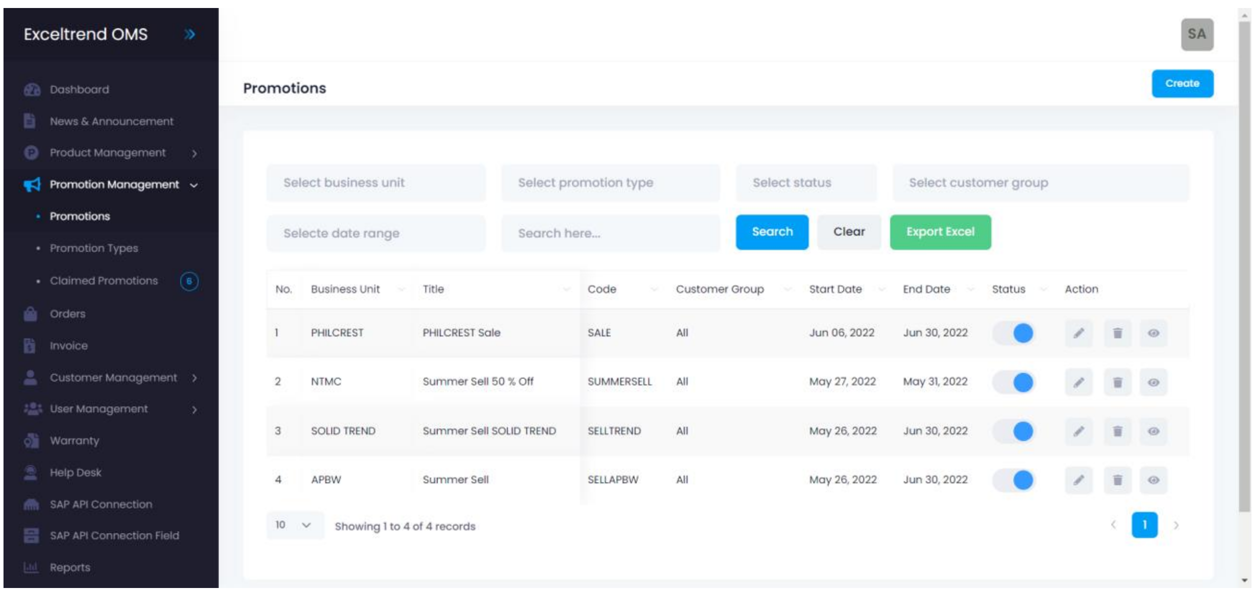
- Steps 2: - Enter the data in title, description, select business unit, select promotion type, select customer group, select promotion start date and end date, and upload promotion image.



- Steps 3: - Click on Save button.

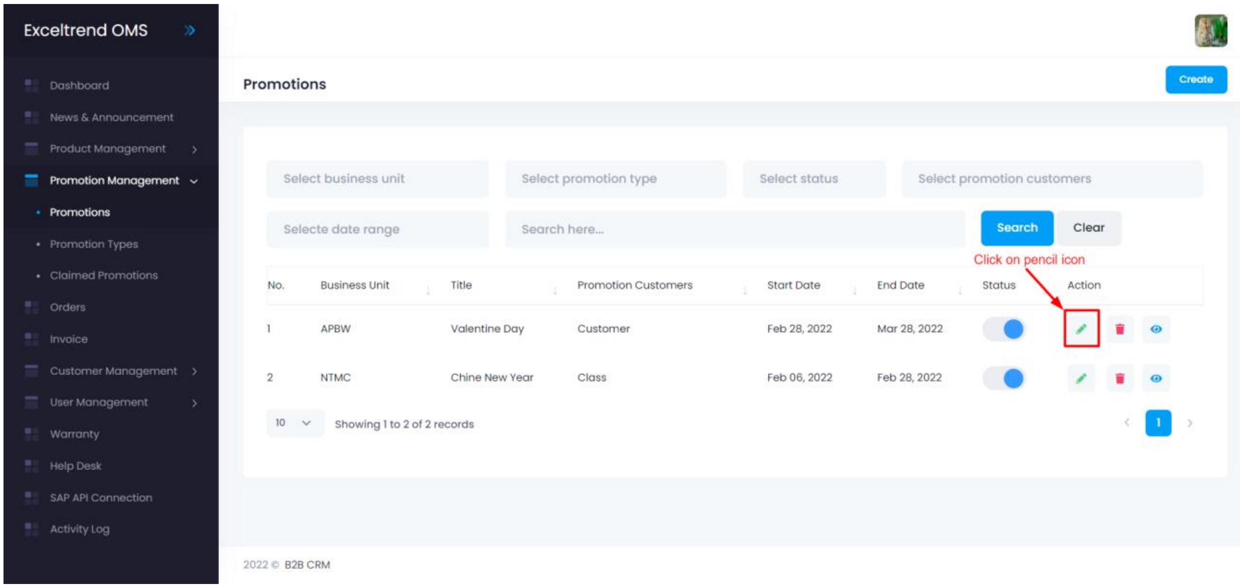


- Steps 4: - Created promotion show in listing page.

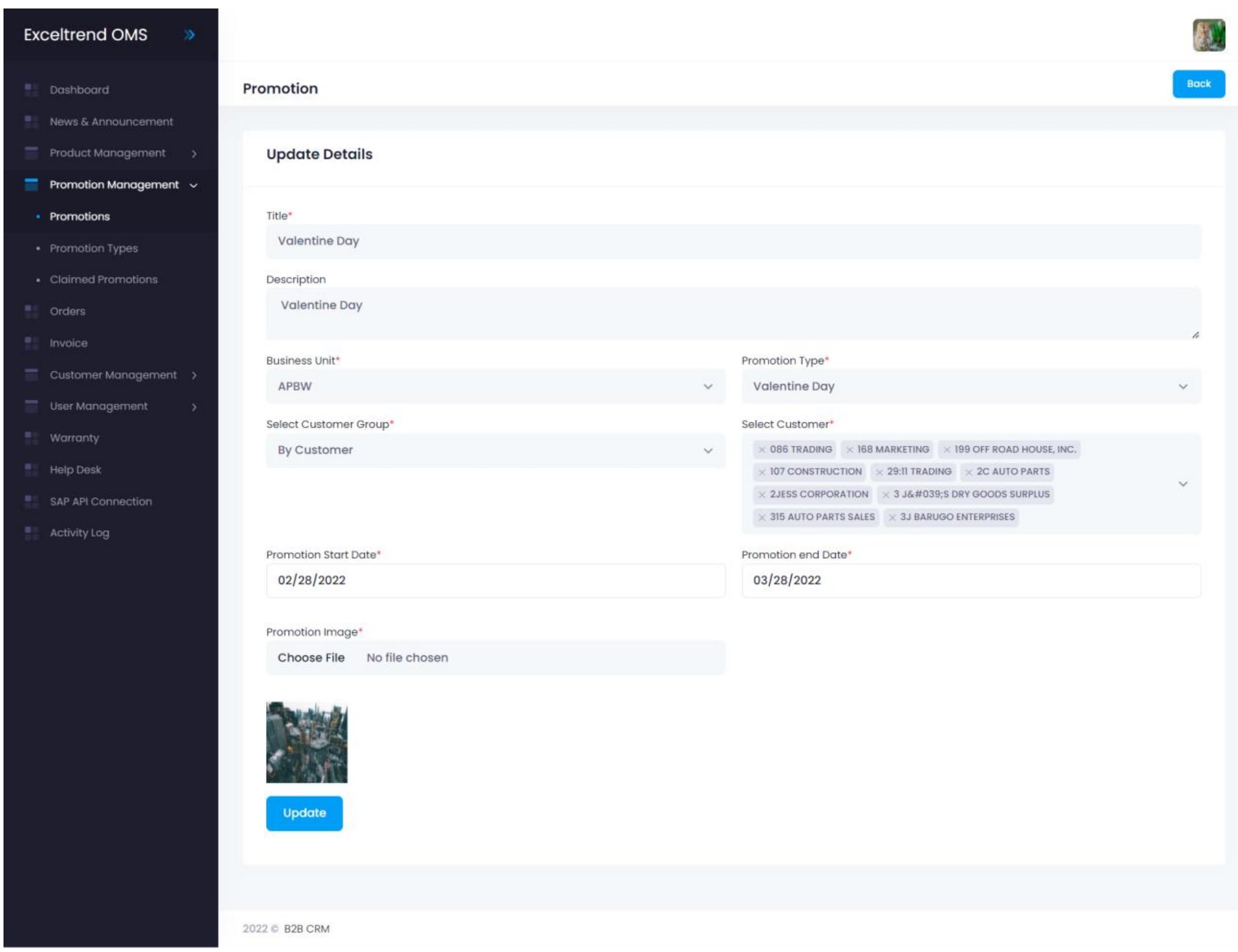


3.1.2 Steps: - How to edit the promotion.

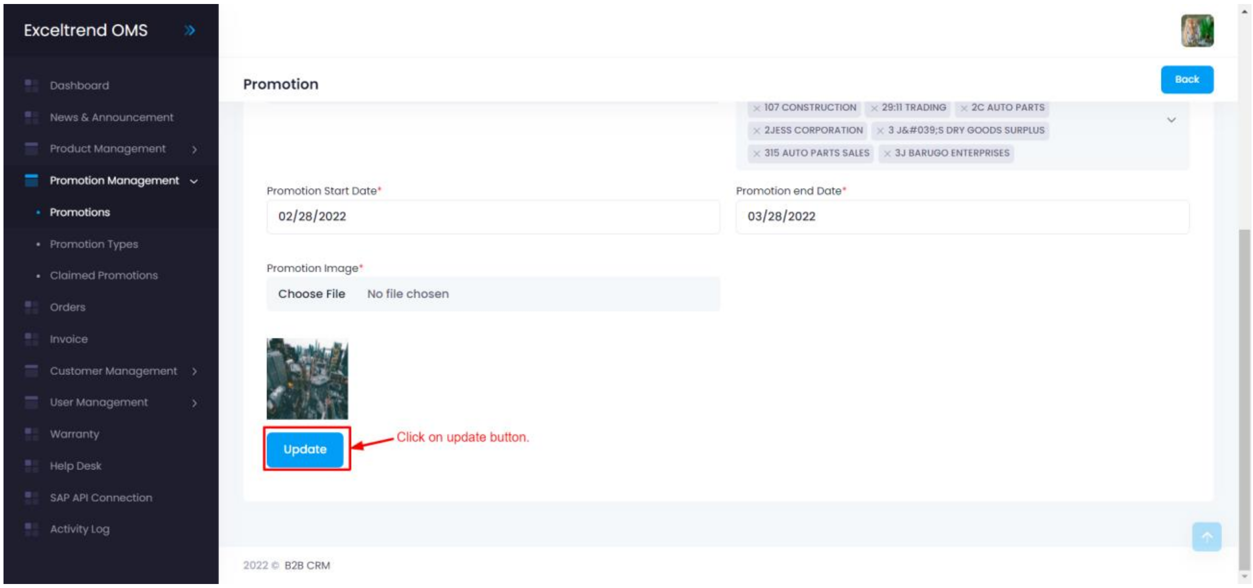
- Steps 1: - Click on pencil icon.



- Steps 2: - Update the data displayed filed.

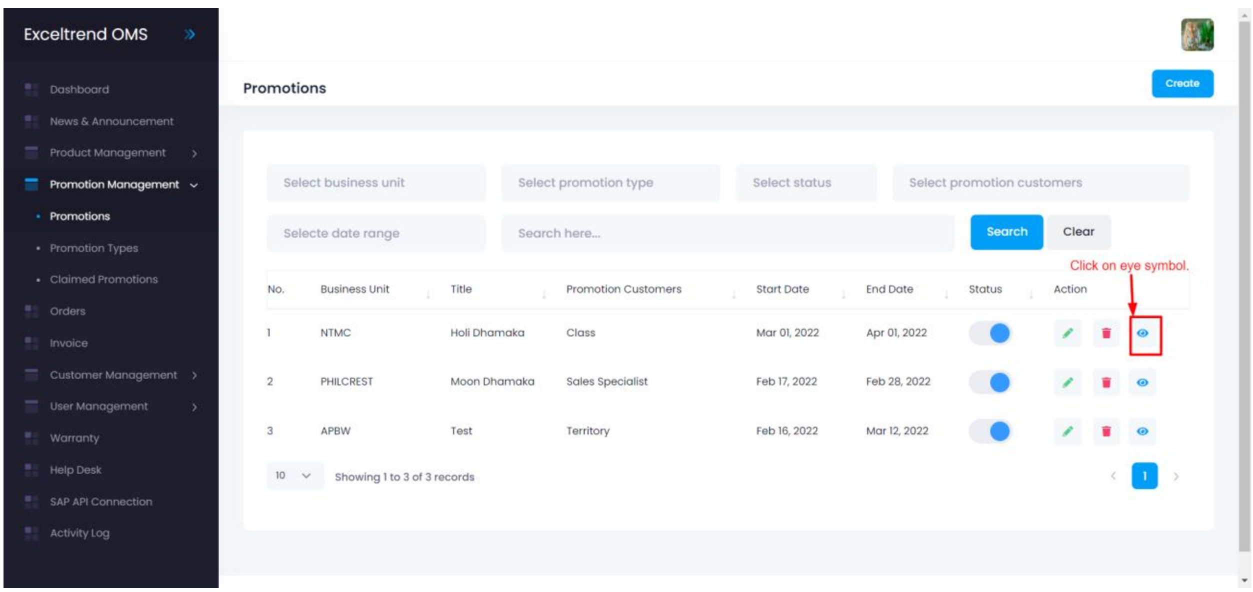


- Steps 3: - Click on update button.



3.1.3 Steps: - How to view the promotion.

- Steps 1: - Click on eye icon.



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

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

Promotion

Back

Holi Dhamaka

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

Class List

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

10 Showing 1 to 3 of 3 records 1

Claimed Customer's

No.	Customer	Date Time	Action
No data available in table			

10 Showing no records

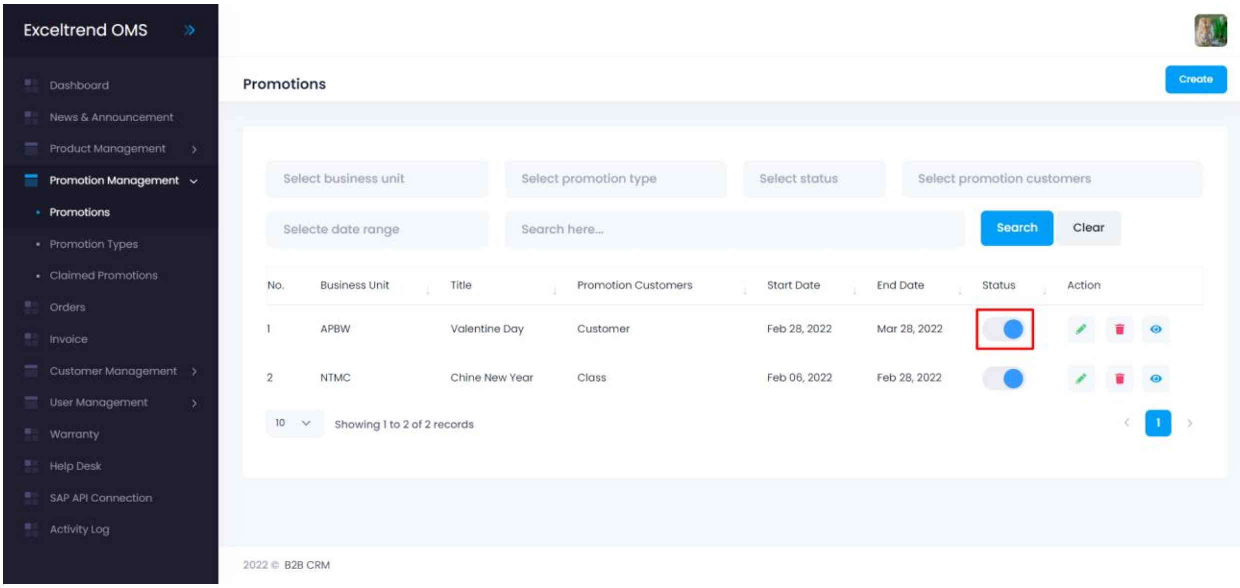
Customer's Interest

No.	Customer	Is Interested ?
No data available in table		

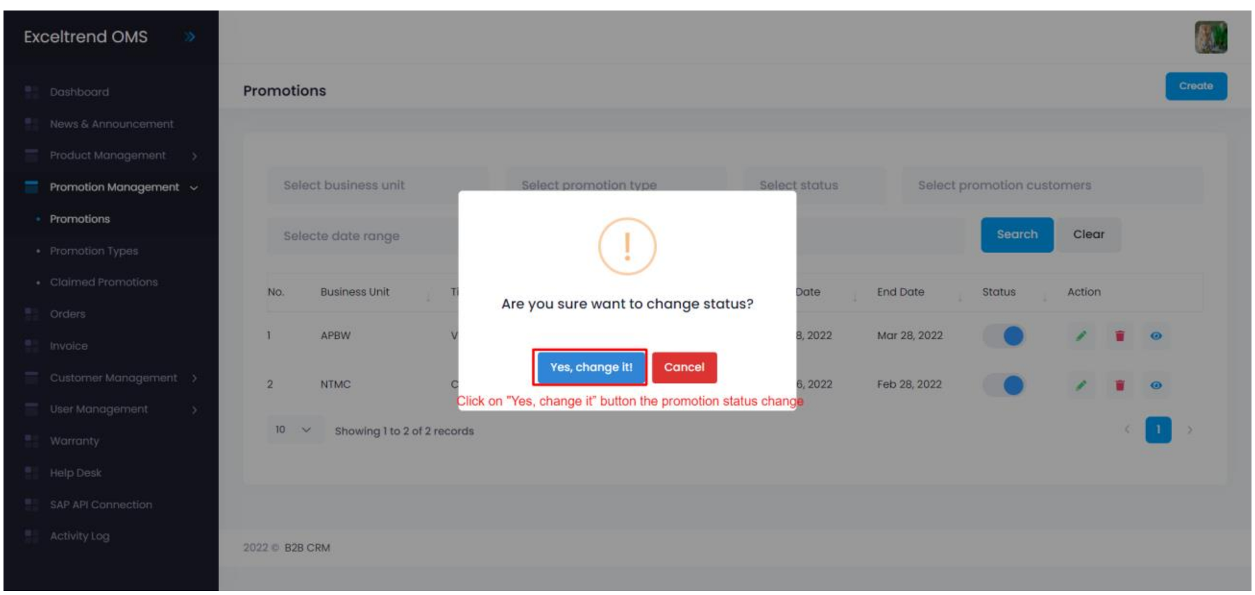
10 Showing no records

3.1.4 Steps: - How active and inactive the promotion.

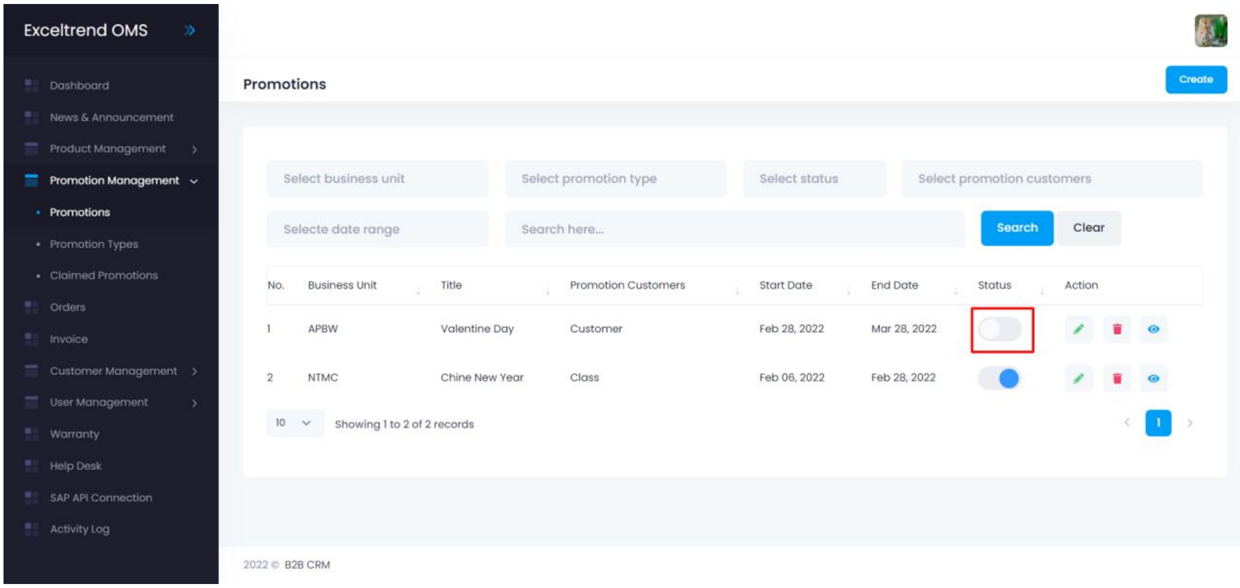
- Steps 1: **-** Click on toggle button and appear a pop-up model.



- 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 promotion status change.

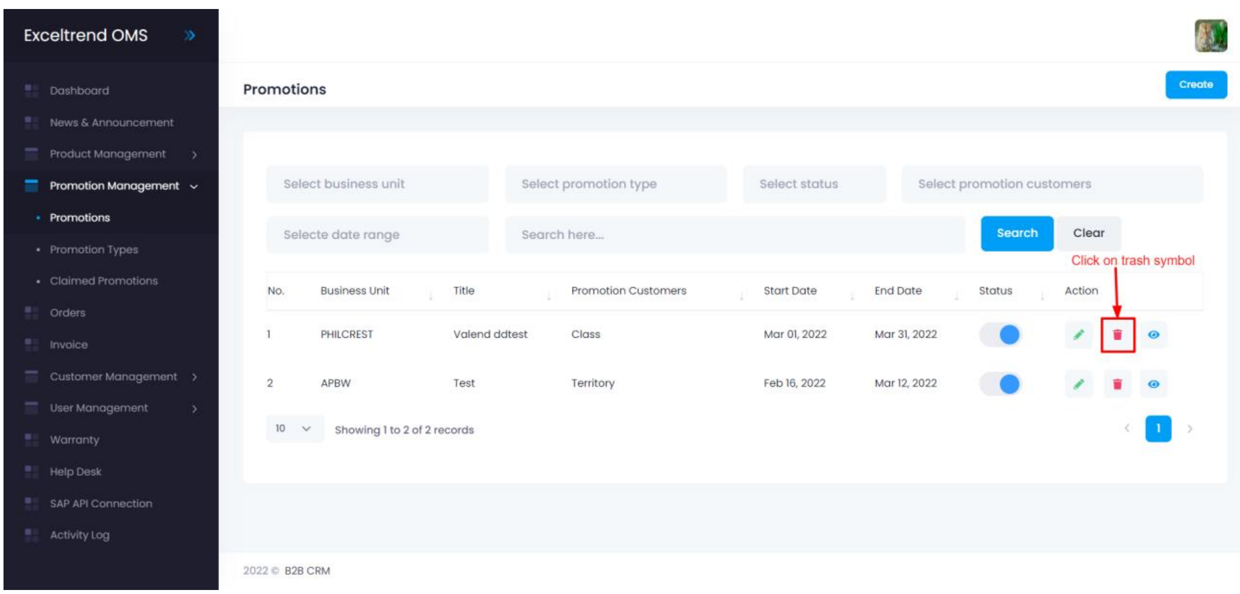


- Steps 3: - Update status show in listing page.

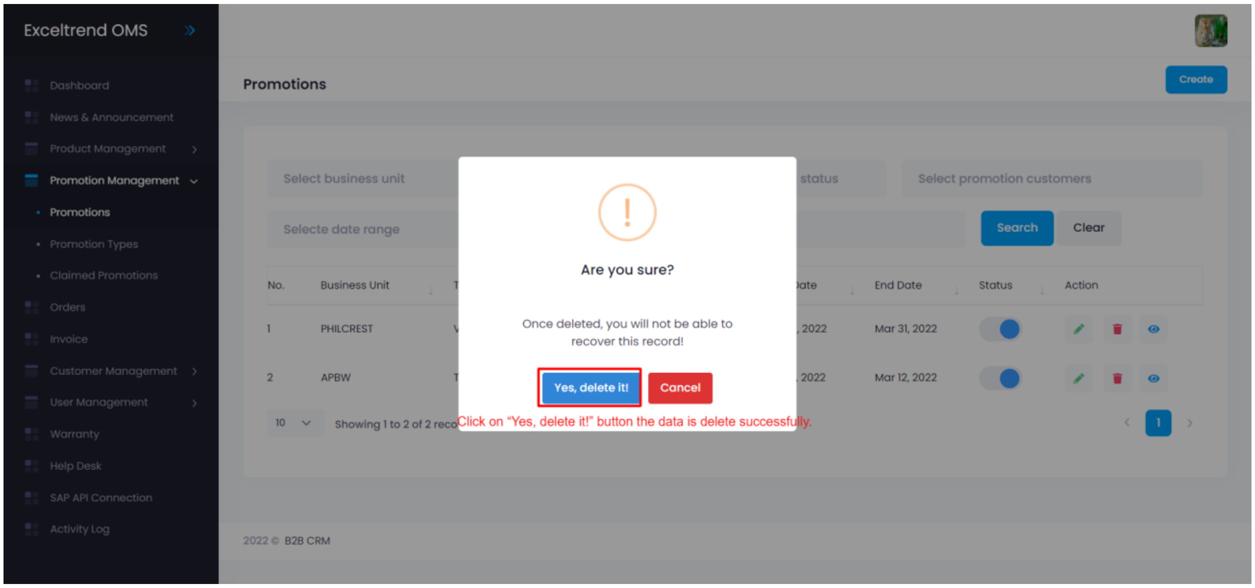


3.1.5 Steps: - How to delete the promotion.

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



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

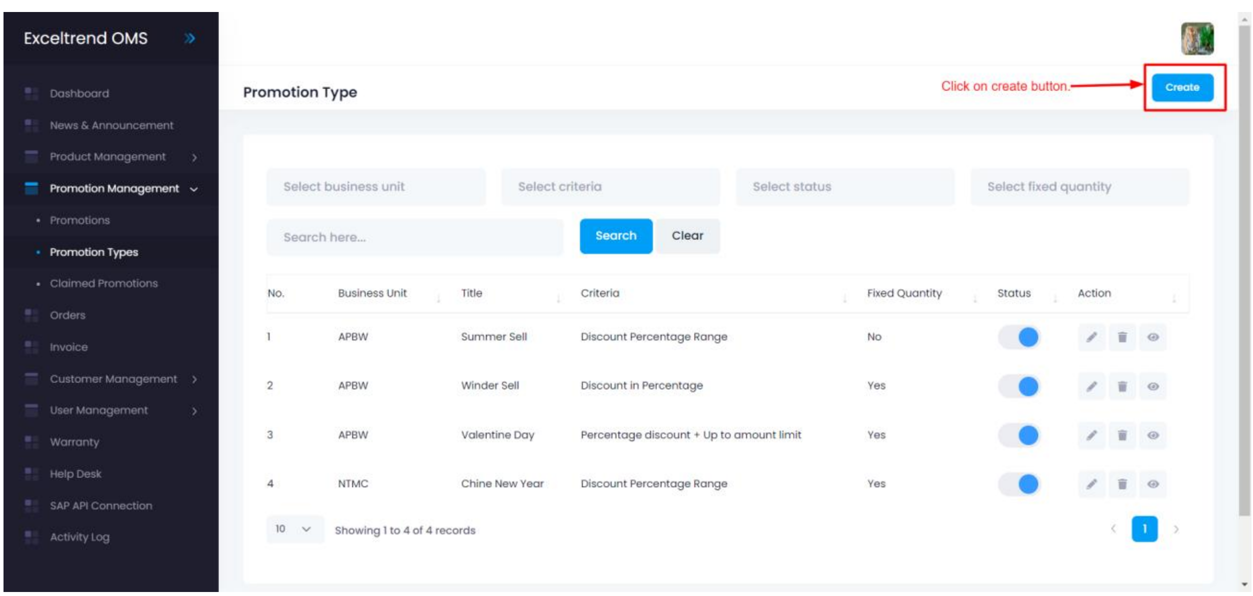


3.2 Promotion Type: -

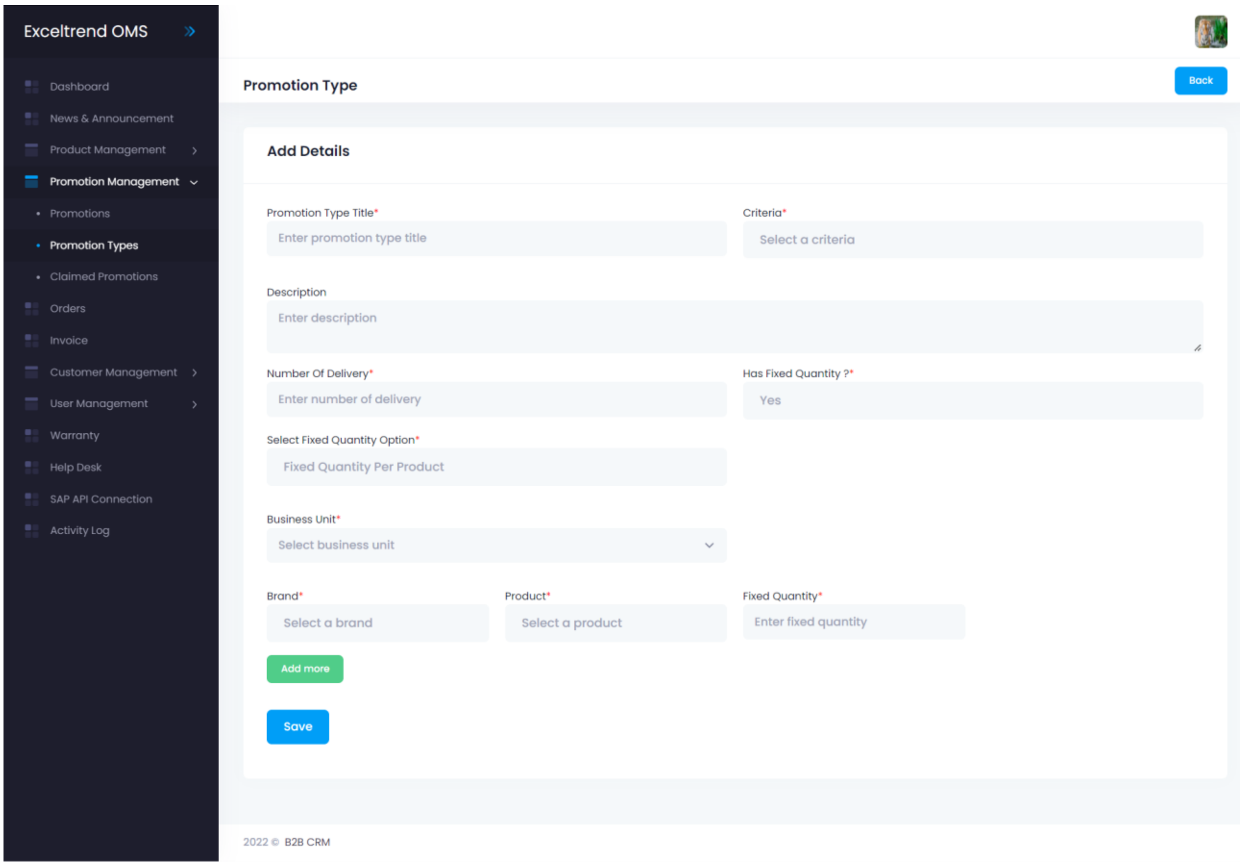
- Admin can create, edit, update, delete, active and inactive the promotion.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Video Link: - https://www.screencast.com/t/9rphGvn1dvS

3.2.1 Steps: - How to create a new promotion type.

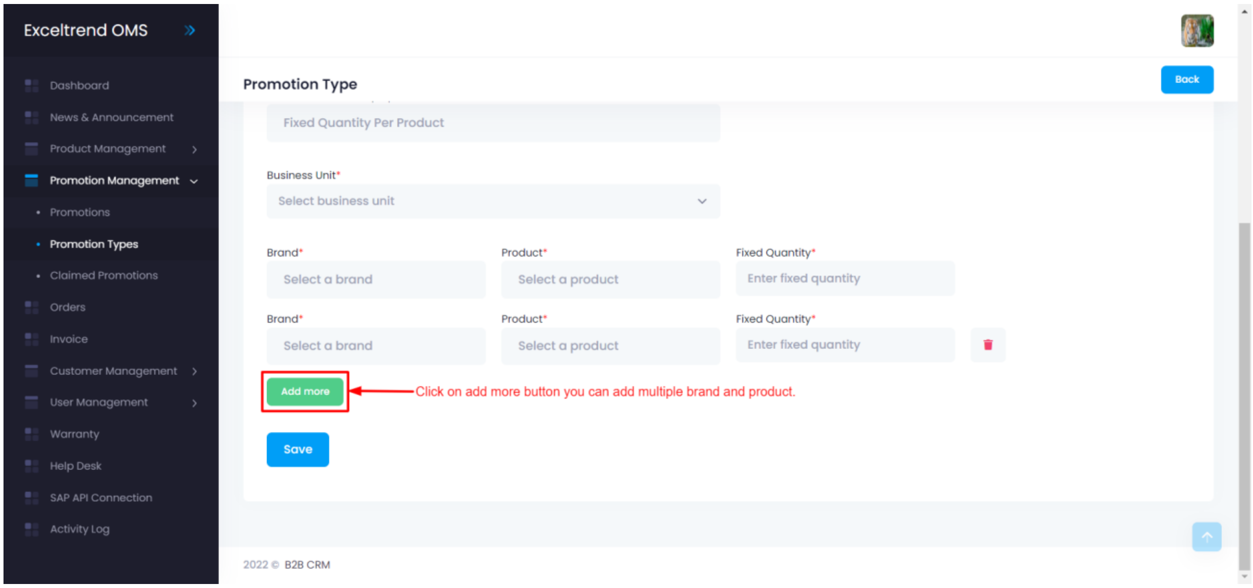
- Steps 1: - Click on create button.



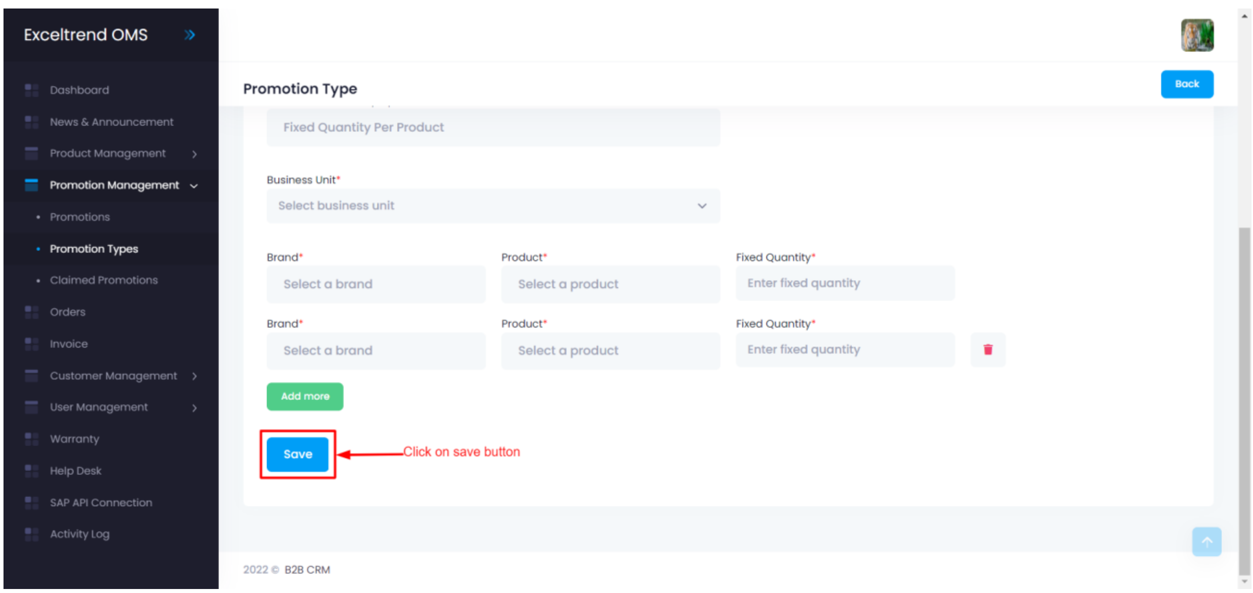
- Steps 2: - Enter the data in promotion type title, Select the criteria, enter the description, number of deliveries, select the has fixed quantity, select the fixed quantity option, select business unit, and select brand and product.



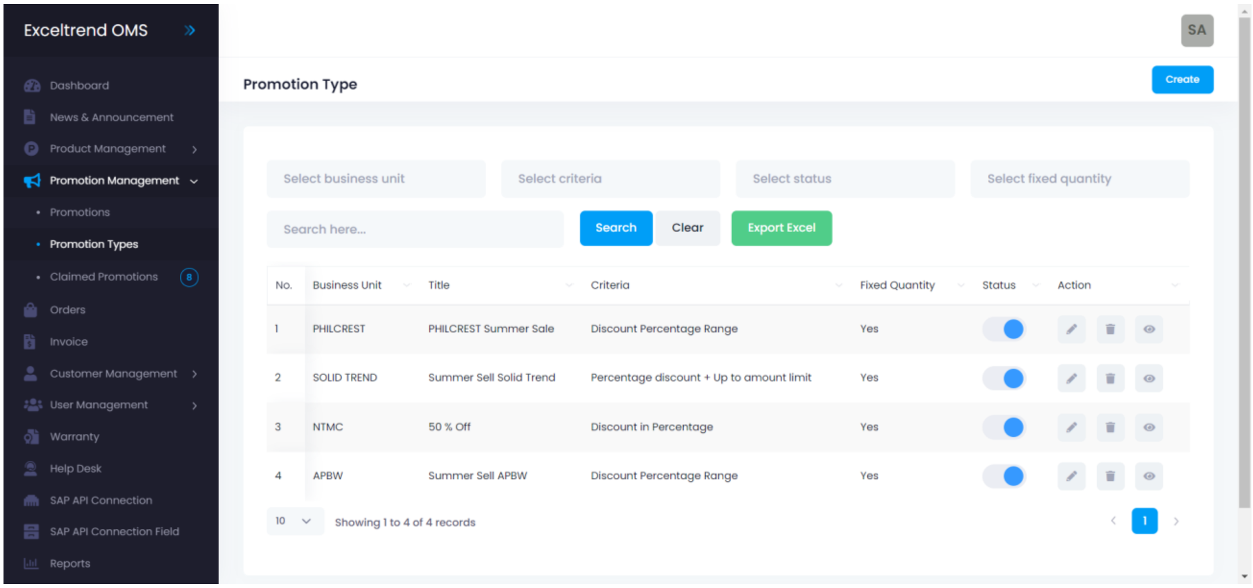
- Steps 3: - Click on add more button you can add multiple brand and product.



- Steps 4: - Click on save button.

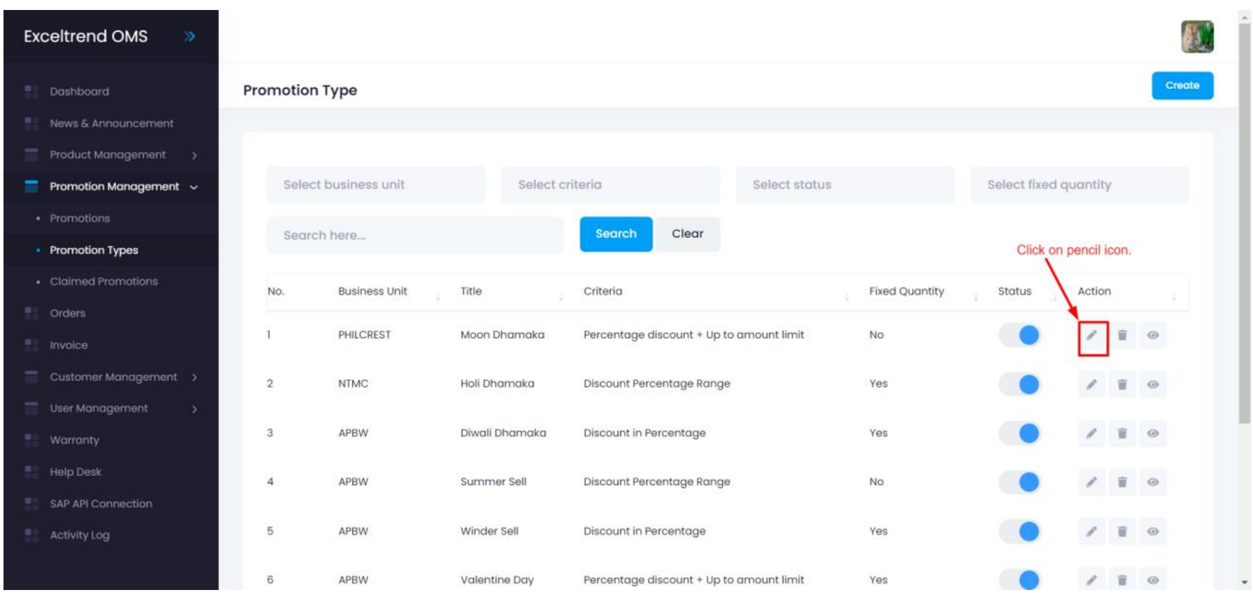


- Steps 5: - Created promotion type show in listing page.

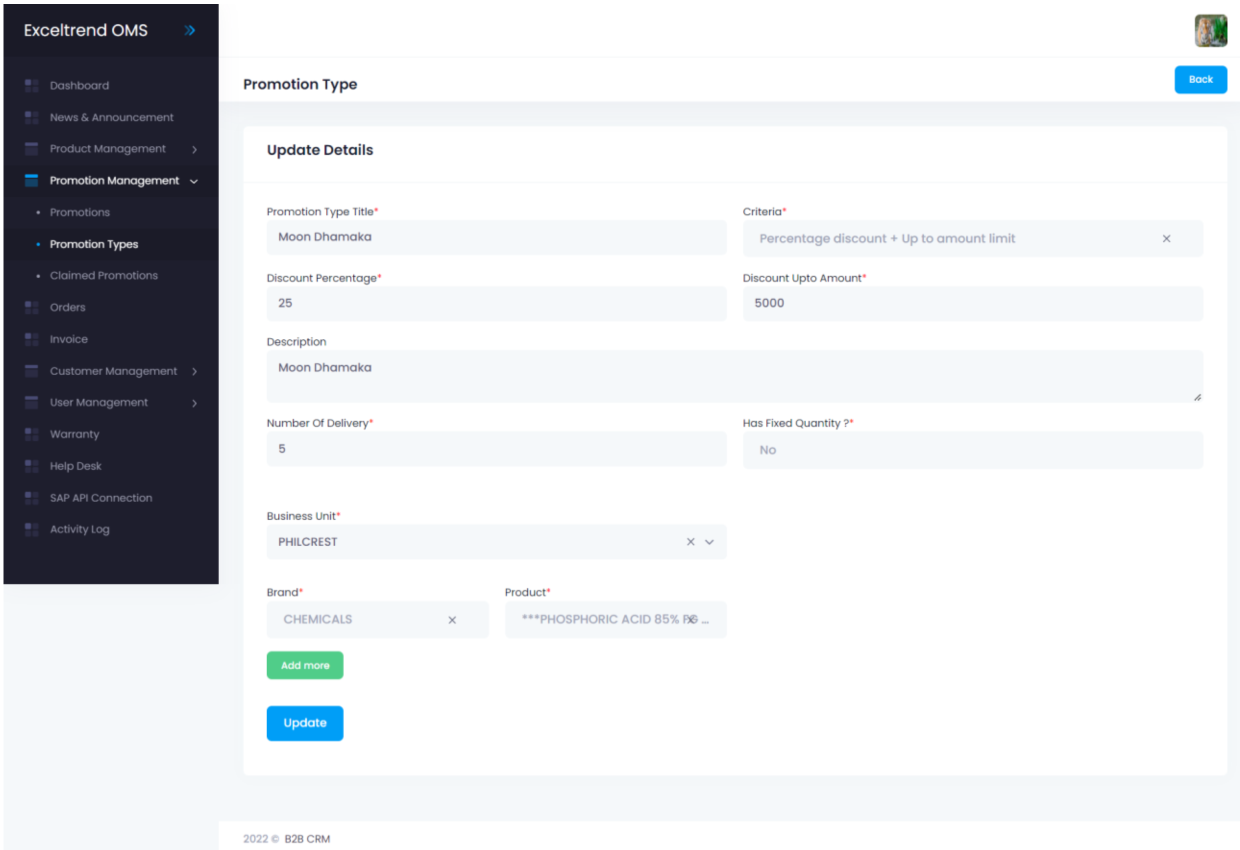


3.2.2 Steps: - How to edit the promotion.

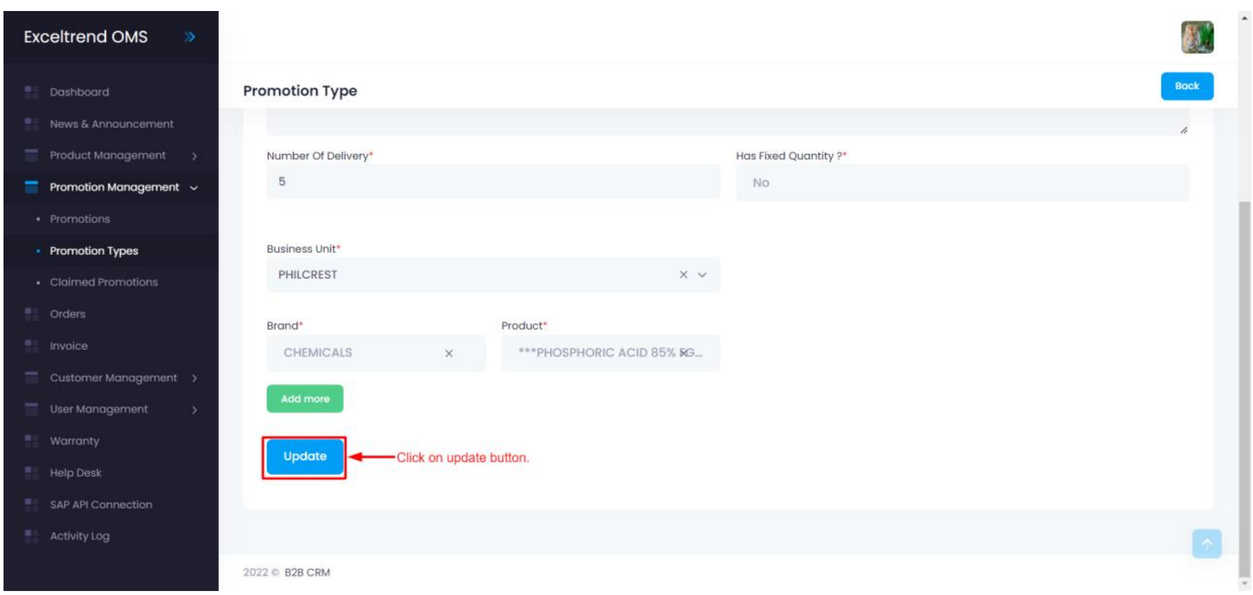
- Steps 1: - Click on pencil icon.



- Steps 2: - Update the data displayed filed.

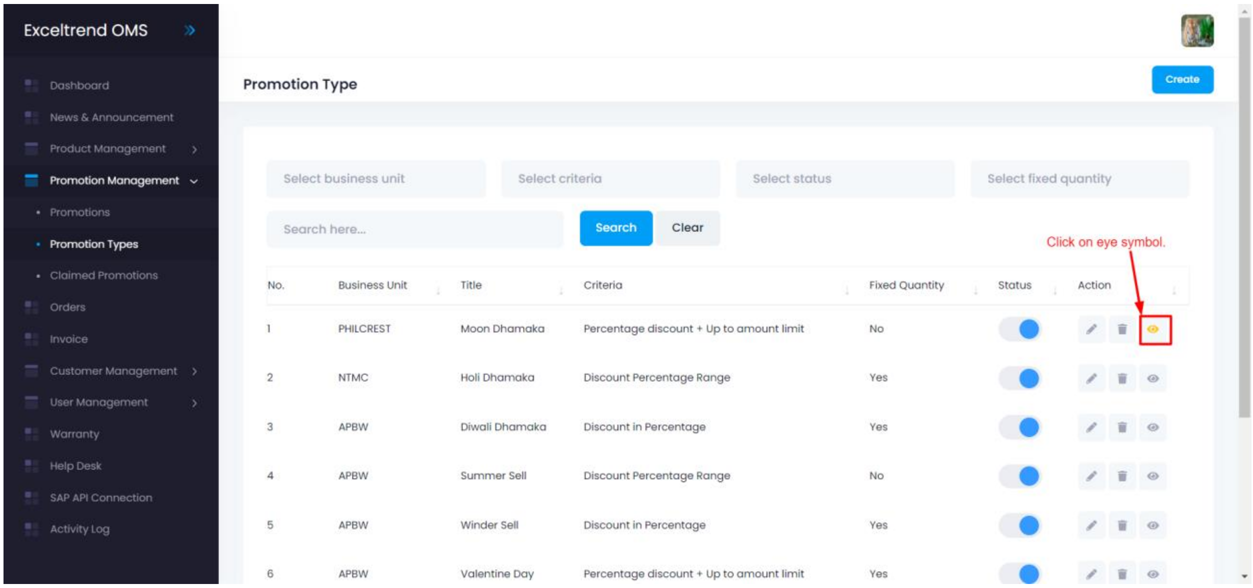


- Steps 3: - Click on update button.

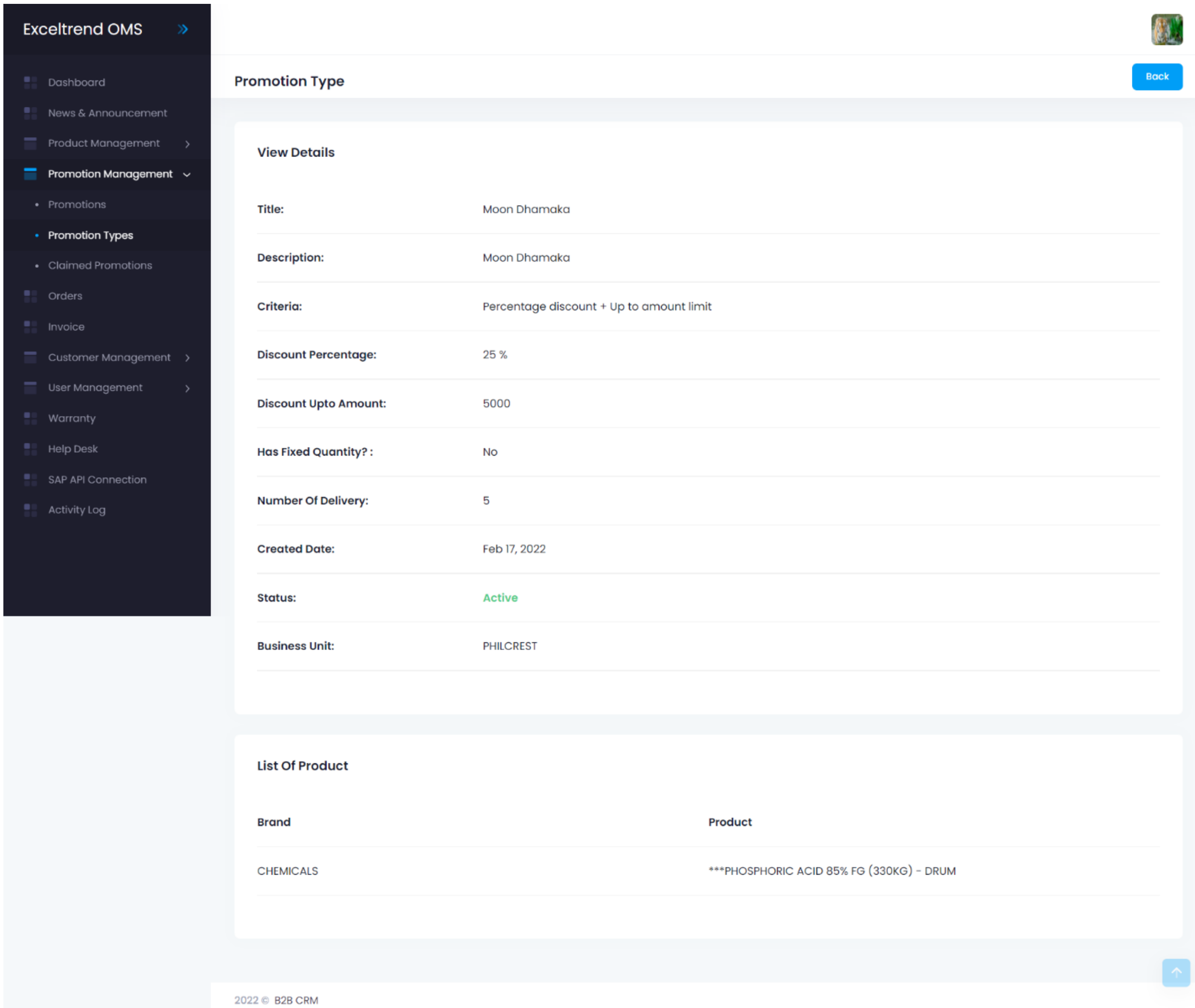


3.2.3 Steps: - How to view the promotion type.

- Steps 1: - Click on eye icon.

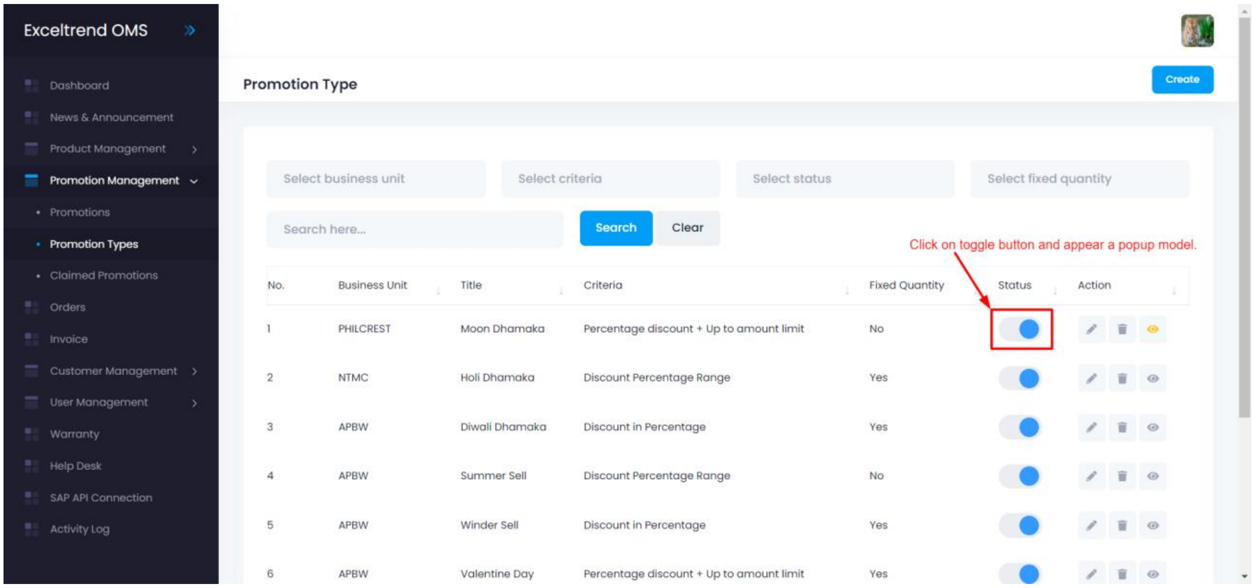


- Steps 2: - Promotion type all details displayed in view page.

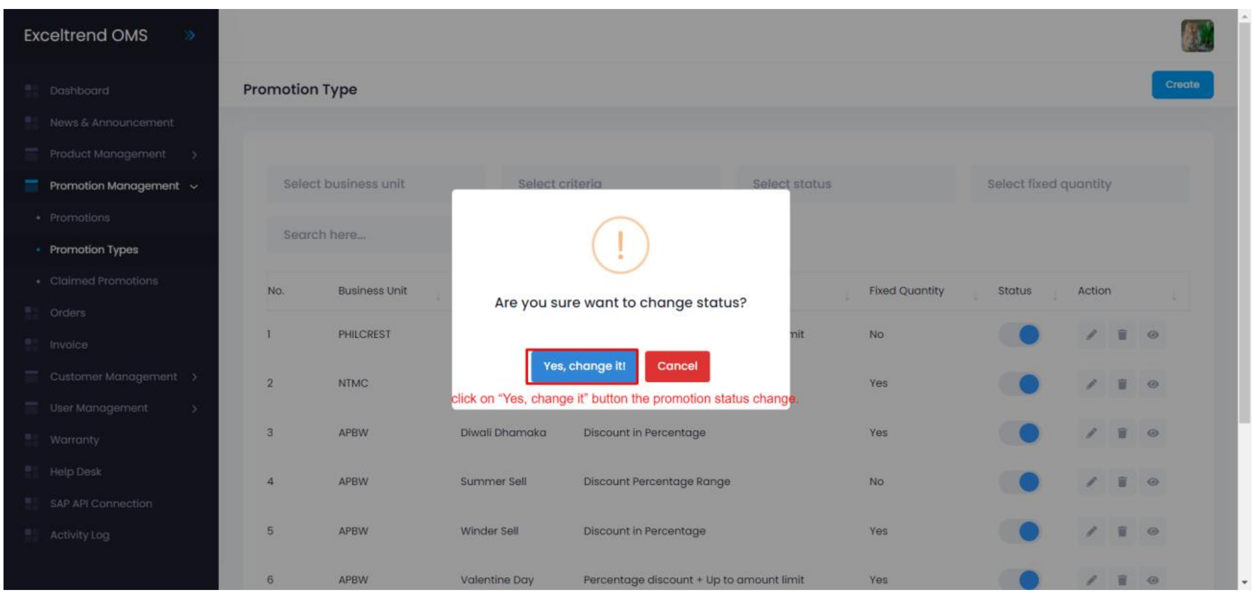


3.2.4 Steps: - How active and inactive the promotion type.

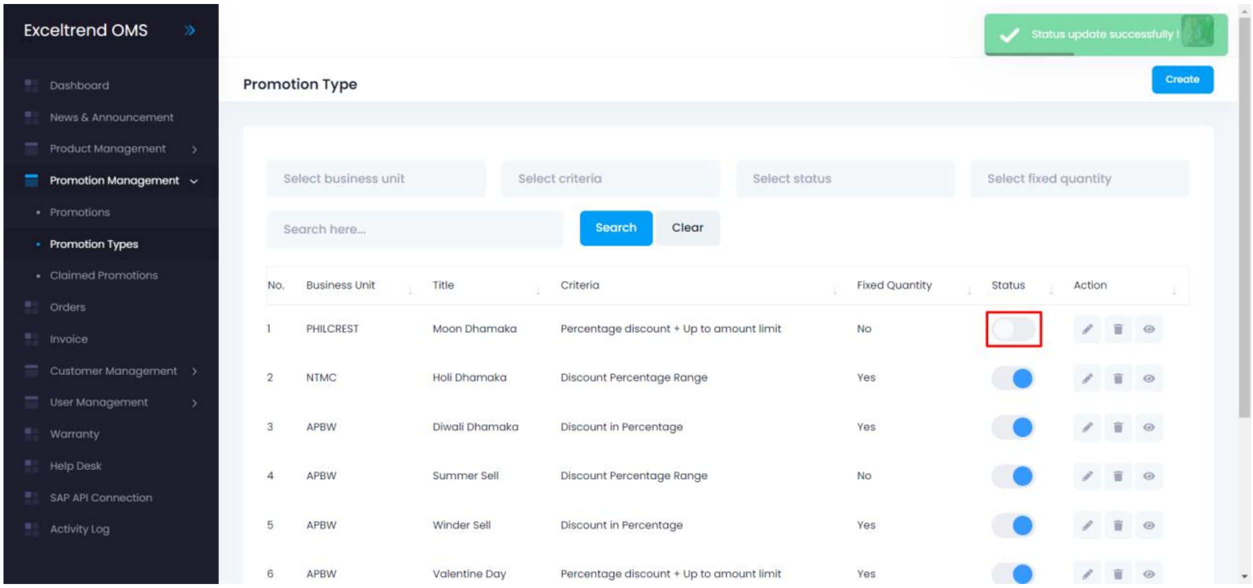
- Steps 1: **-** Click on toggle button and appear a pop-up model.



- 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 promotion status change.

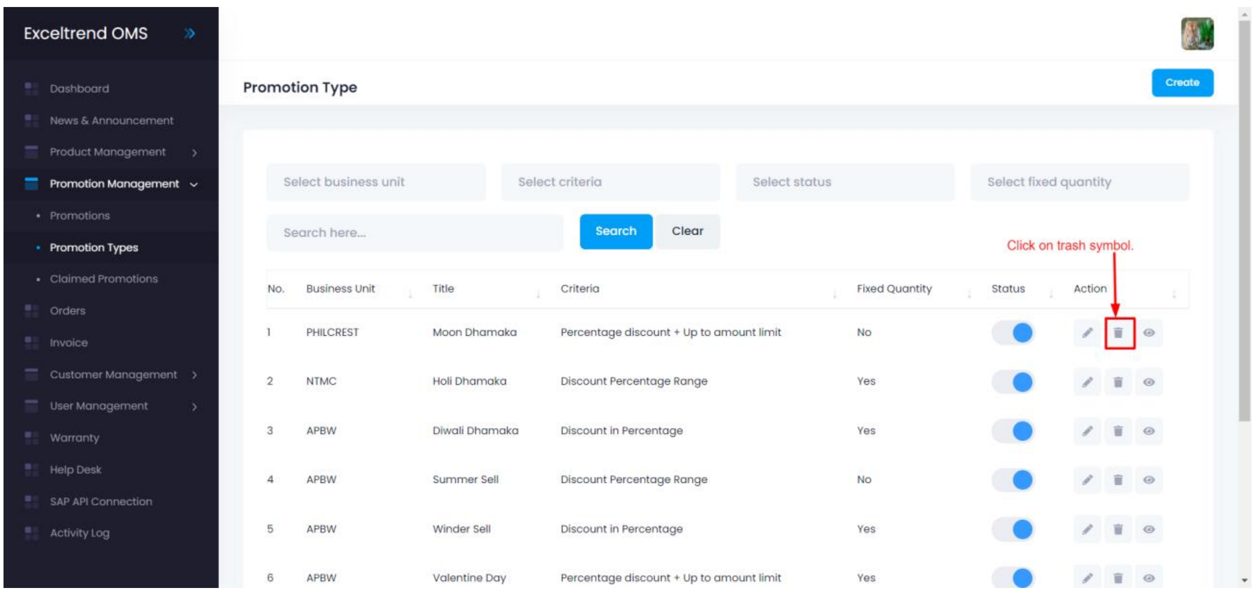


- Steps 3: - Update status show in listing page.

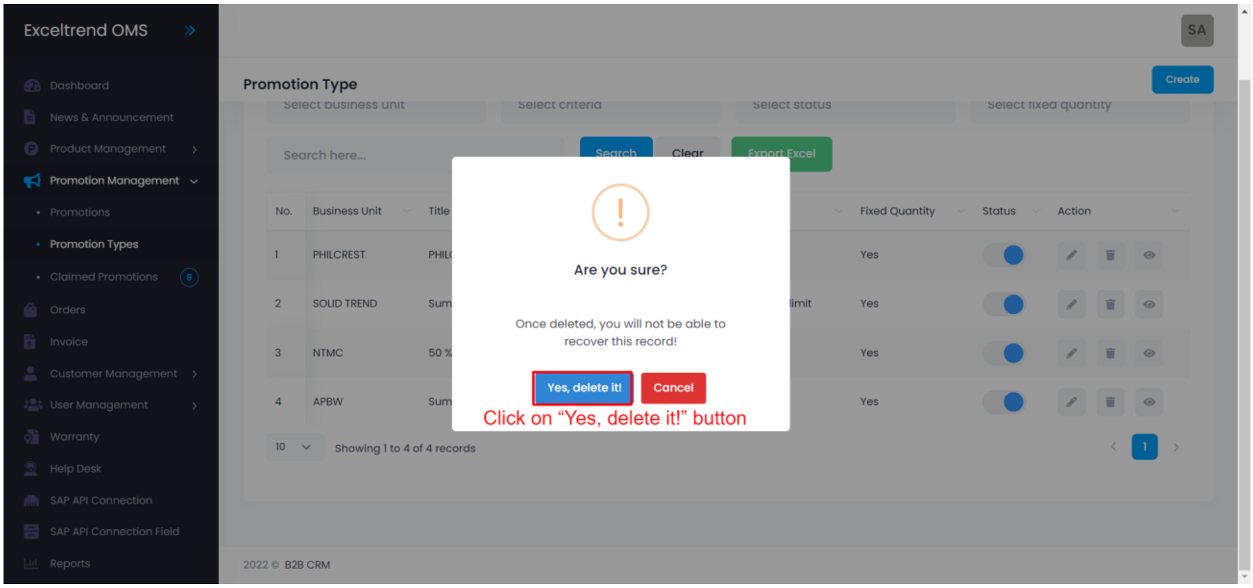


3.2.5 Steps: - How to delete the promotion type.

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

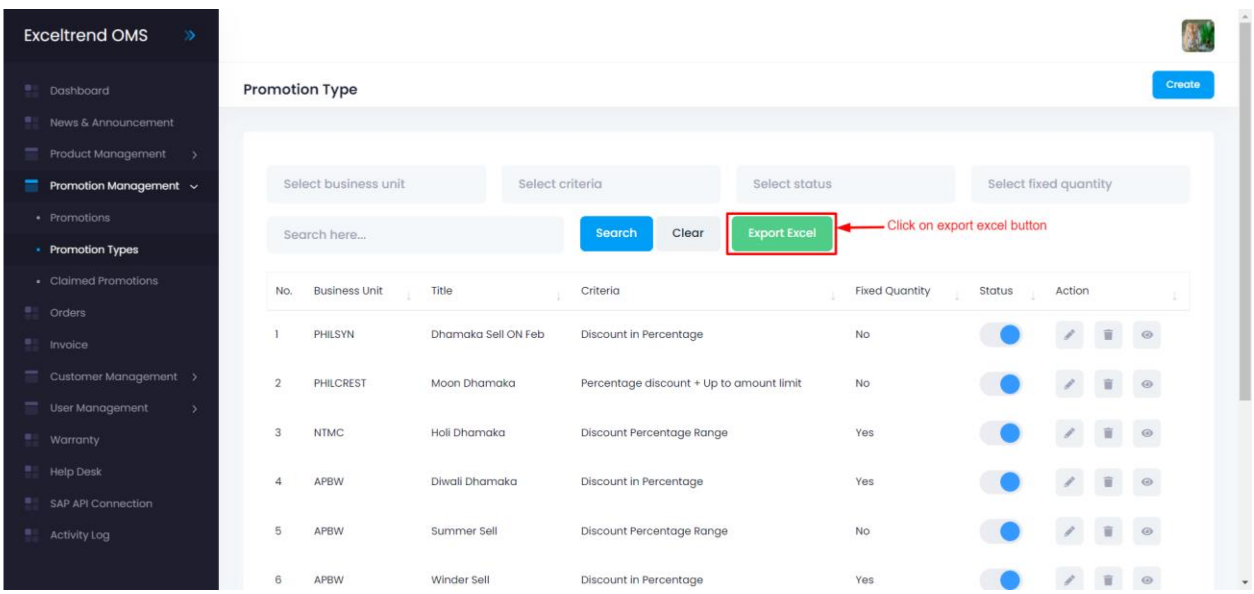


- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.



3.2.6 Steps: - How to export the data.

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



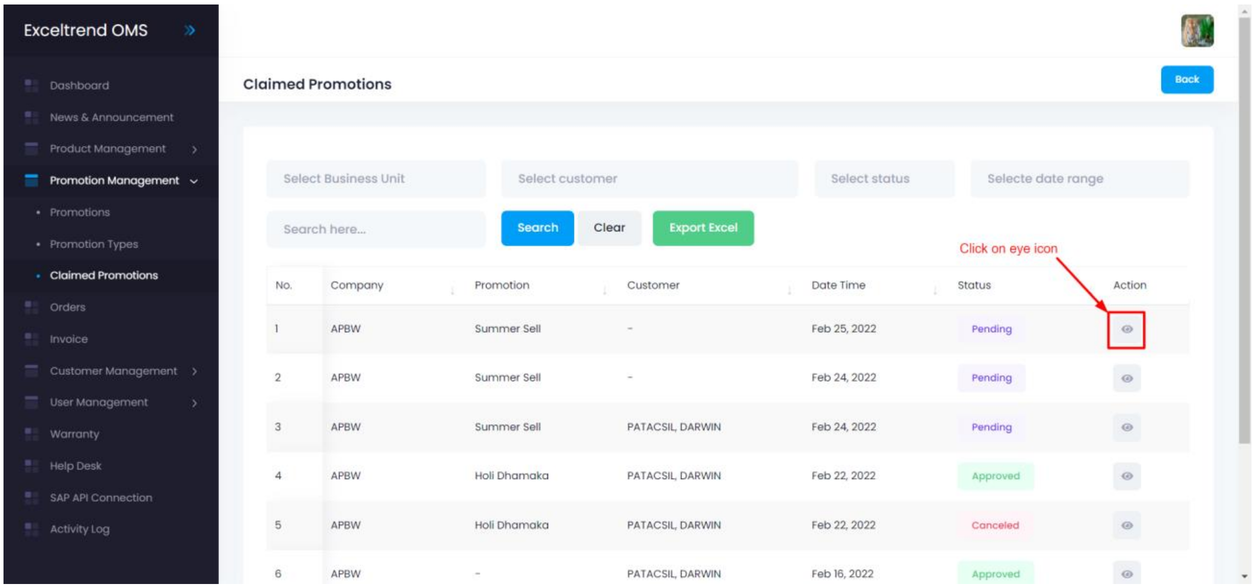
3.3 Claimed Promotions: -

- 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.

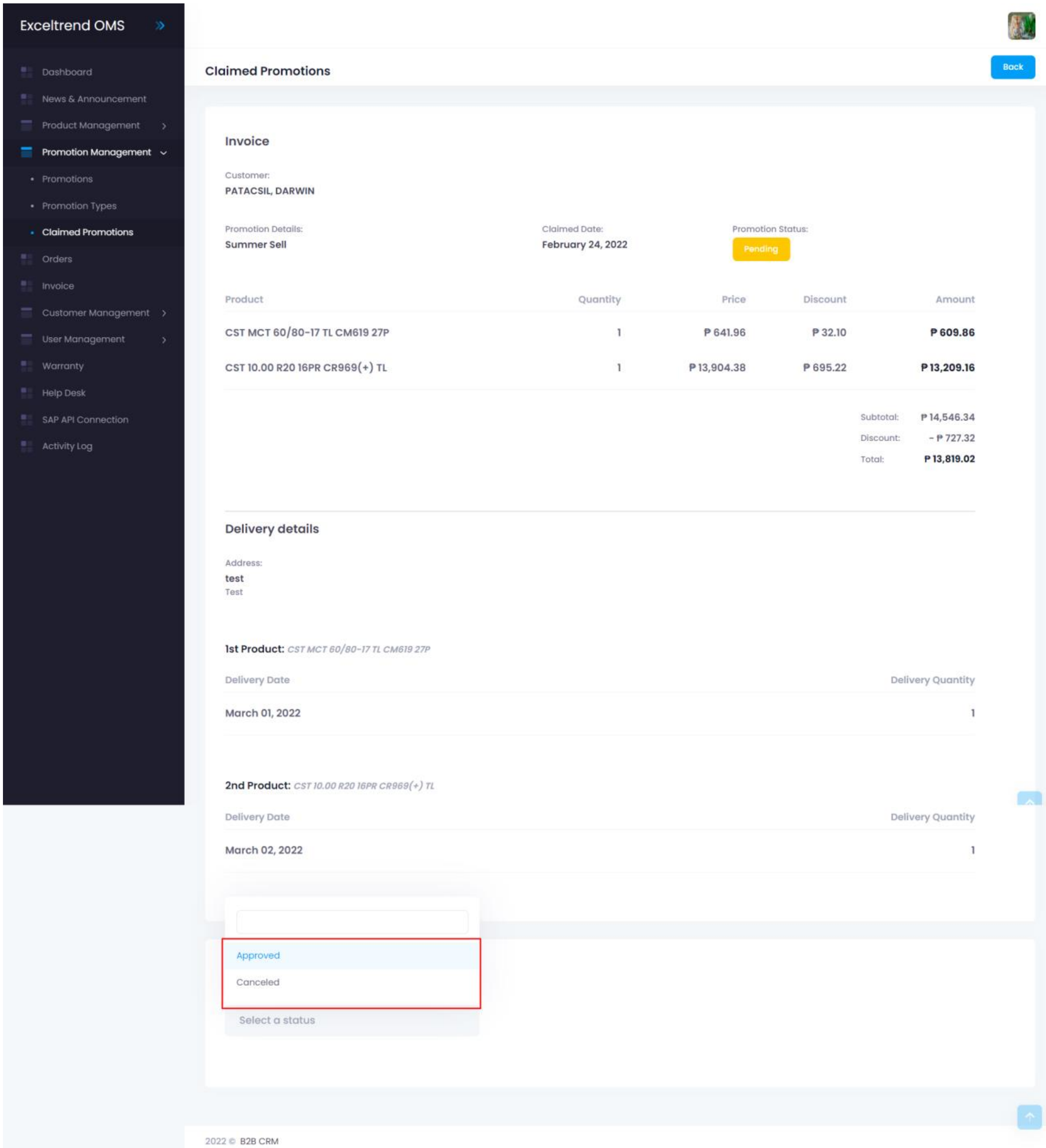
- Video Link: - https://www.screencast.com/t/1lmf8uUaSB

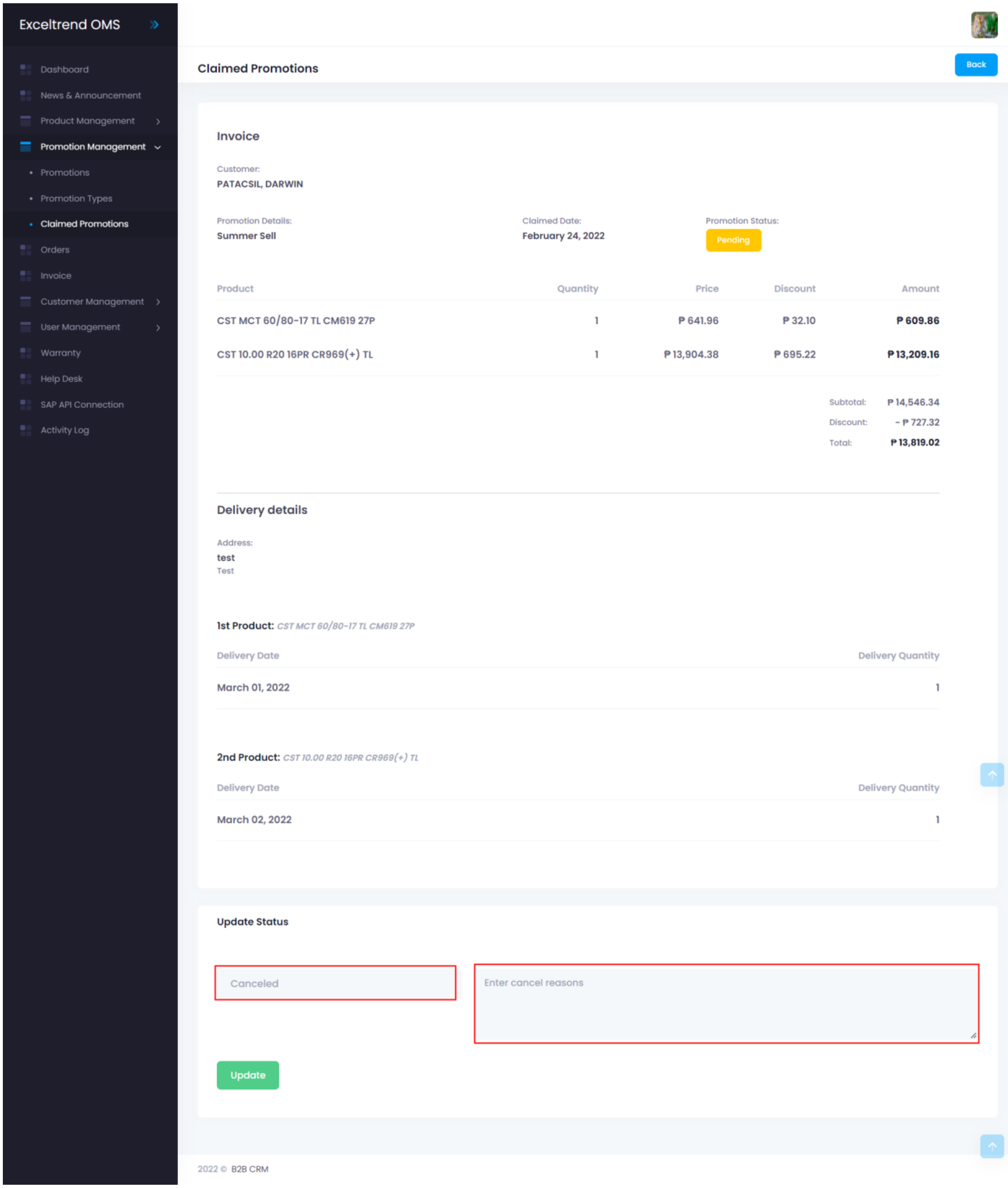
3.3.1 Steps: - How to approve and canceled the claimed promotions.

- Steps 1: - Click on eye icon.

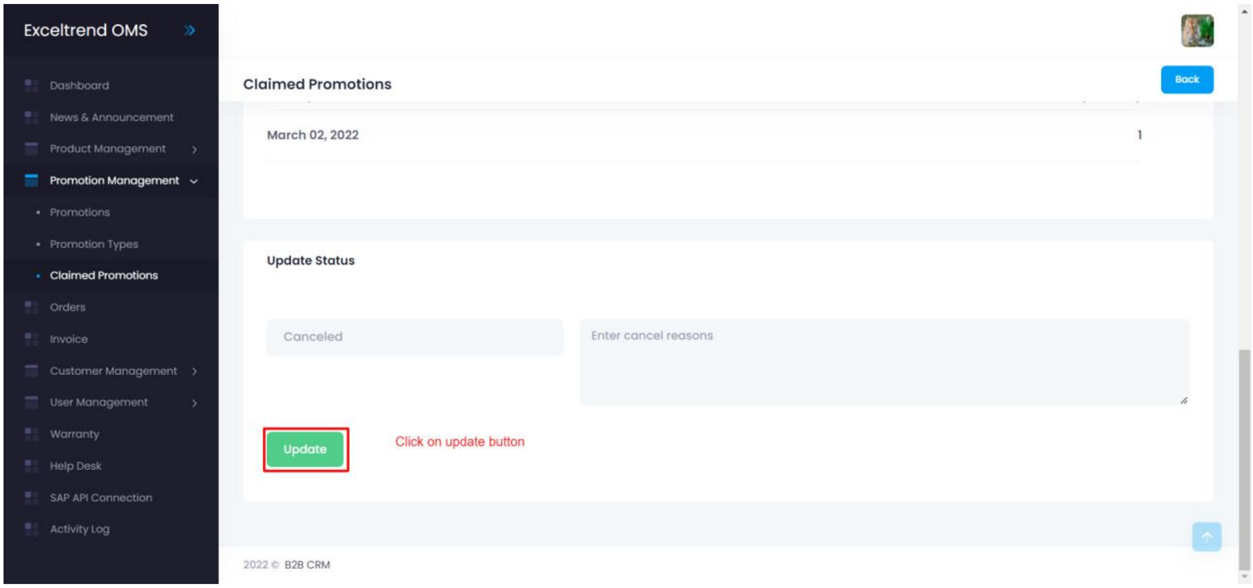


- Steps 2: - Select the status but admin can select canceled status that time admin add reason for canceled promotions.


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
Back
Invoice
Customer:
PATACSIL, DARWIN
Promotion Details:
Summer Sell
Claimed Date:
February 24, 2022
Promotion Status:
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 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 CM619 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
Approved
Canceled
Select a status
2022 © B2B CRM

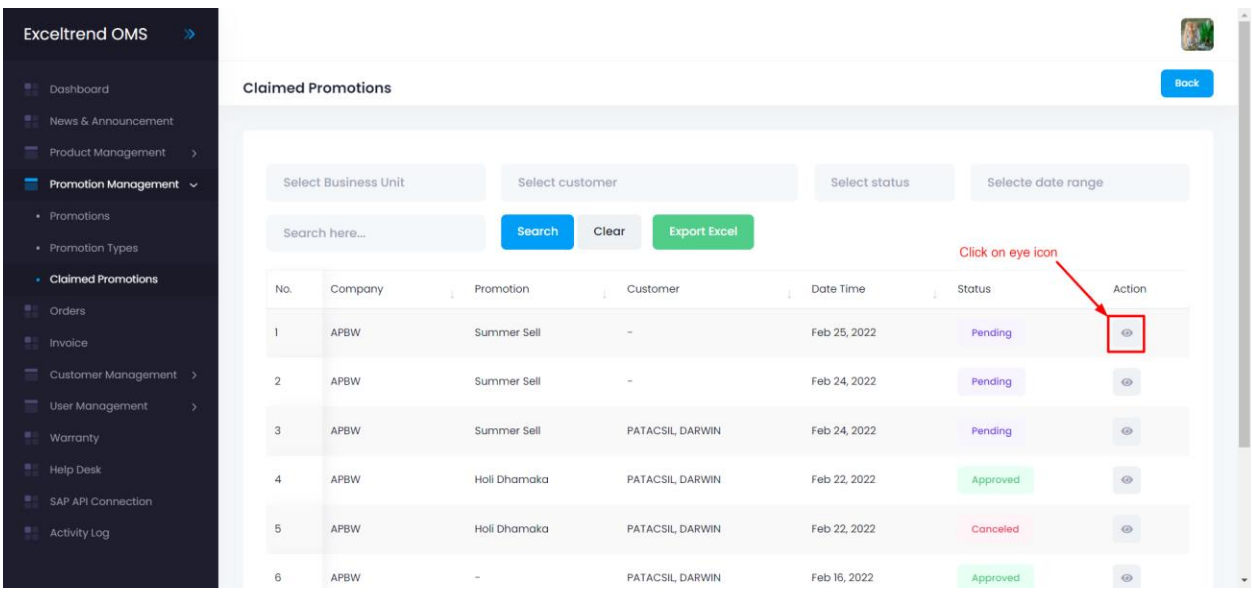


- Steps 3: - Click on update button.

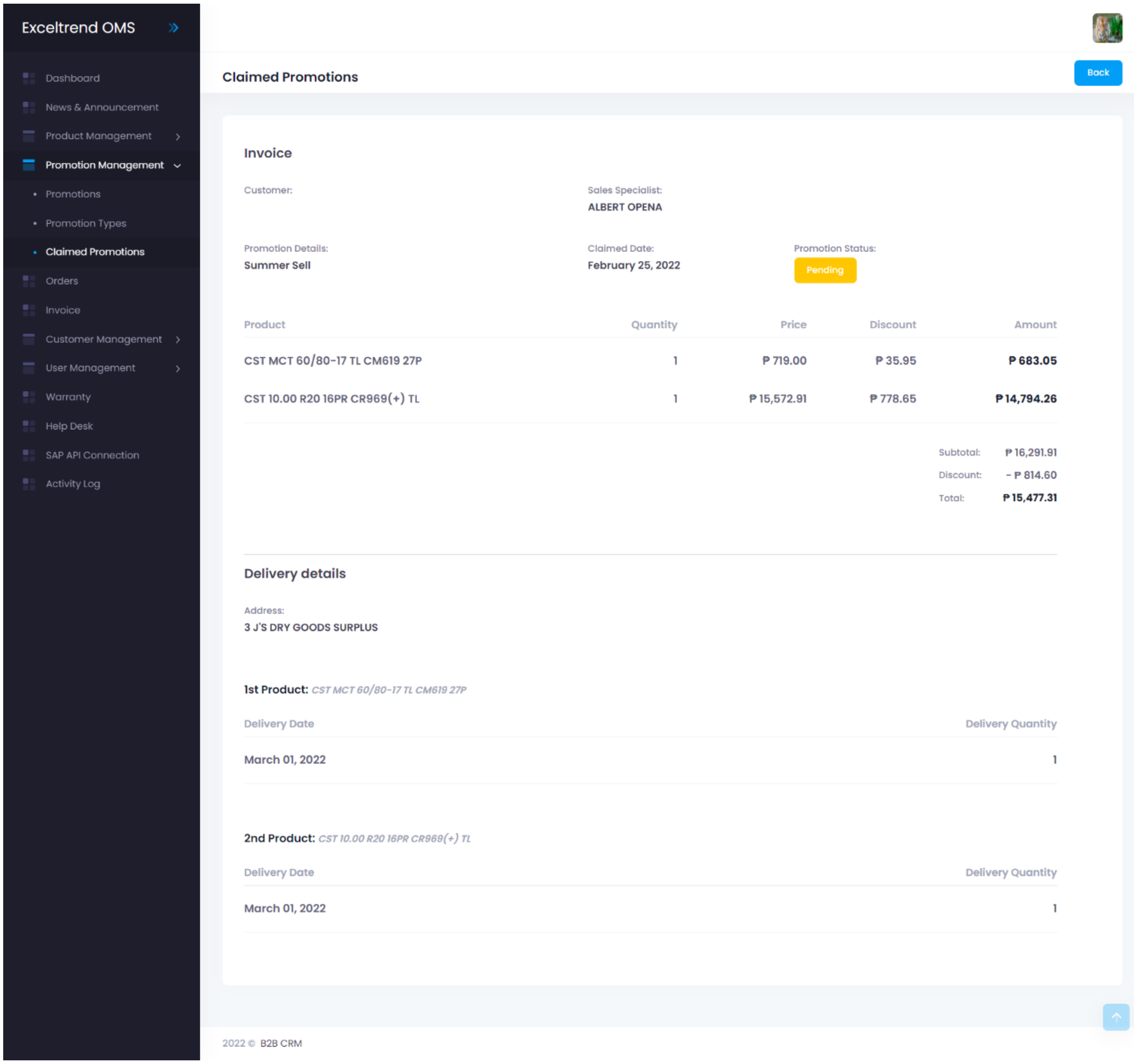


3.3.2 Steps: - How to view the claimed promotions.

- Steps 1: - Click on eye icon.



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

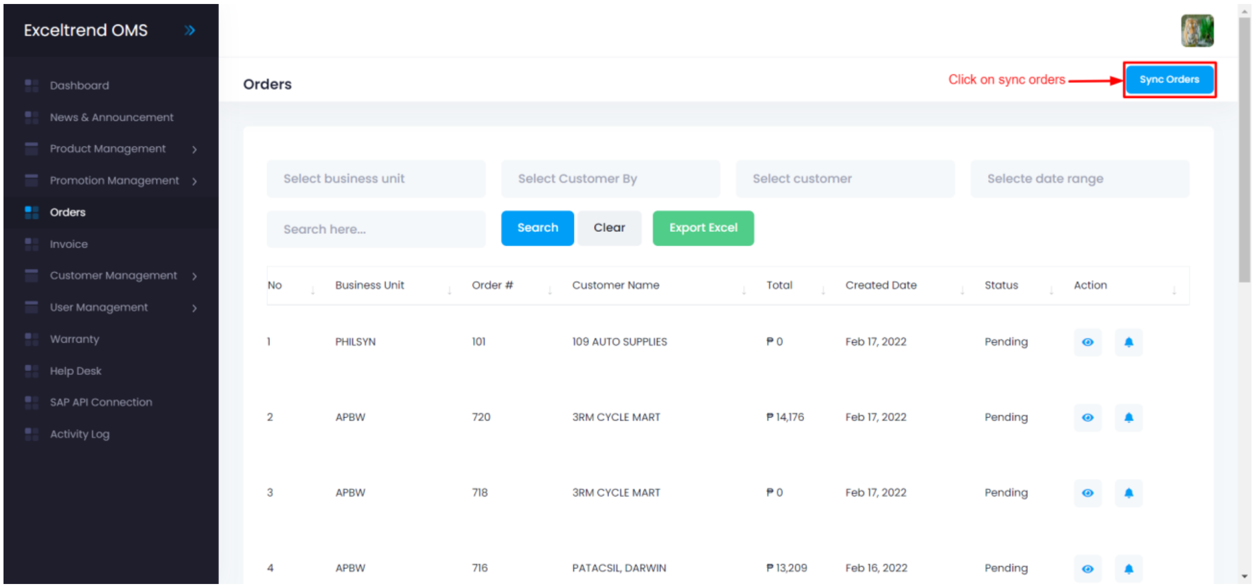


4. Orders: -

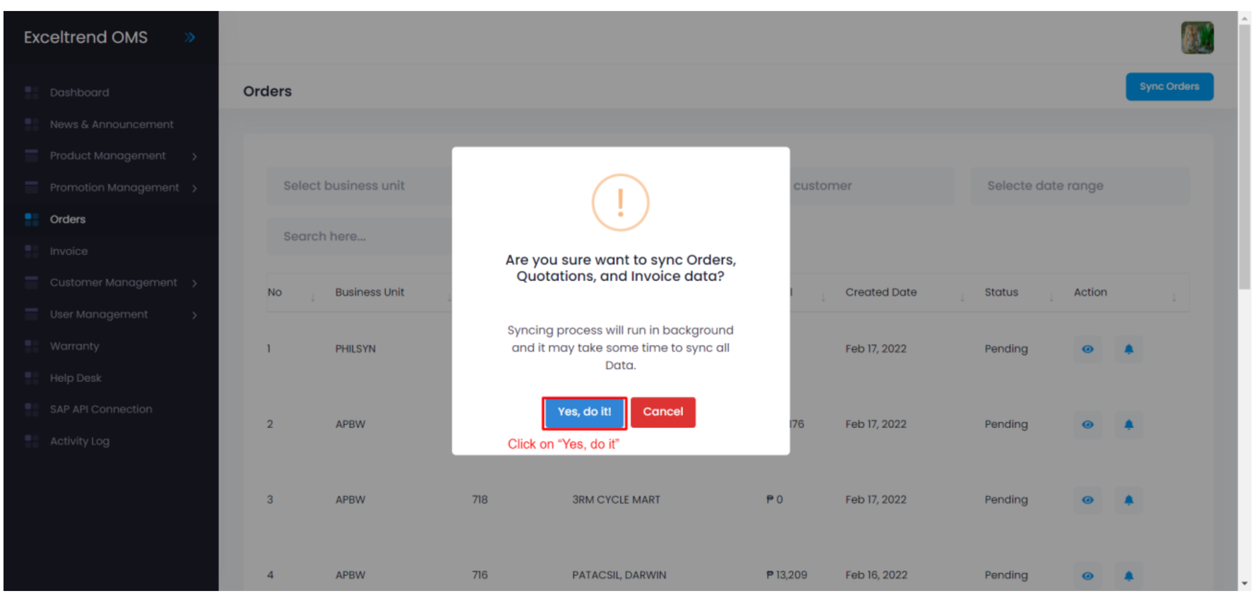
- Admin can sync the order data over here.
- Admin view the orders.
- Admin can notify the customer orders notification.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Admin can export the order data.
- Video Link: - https://www.screencast.com/t/q2TdetqnWBf

4.1 Steps: - How to sync order data.

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

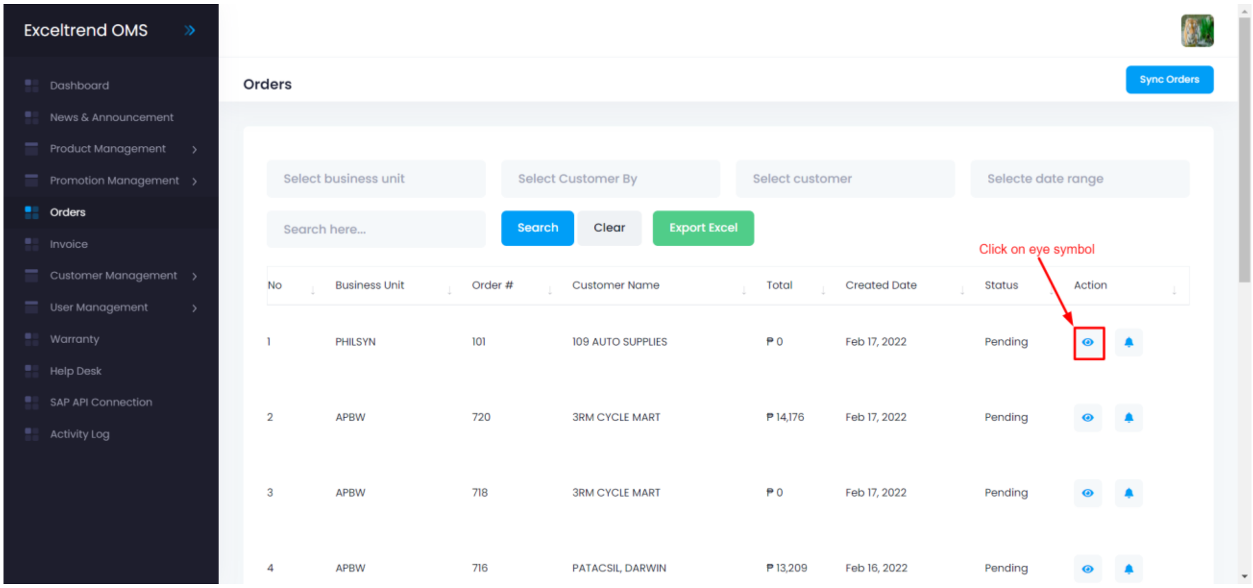


- Steps 2: - Pop-up model appear and show message “Are you sure you want to sync orders, Quotations, and invoice data?” and click on “Yes, do it” button that time loader should be load after the message displayed sync orders successfully.

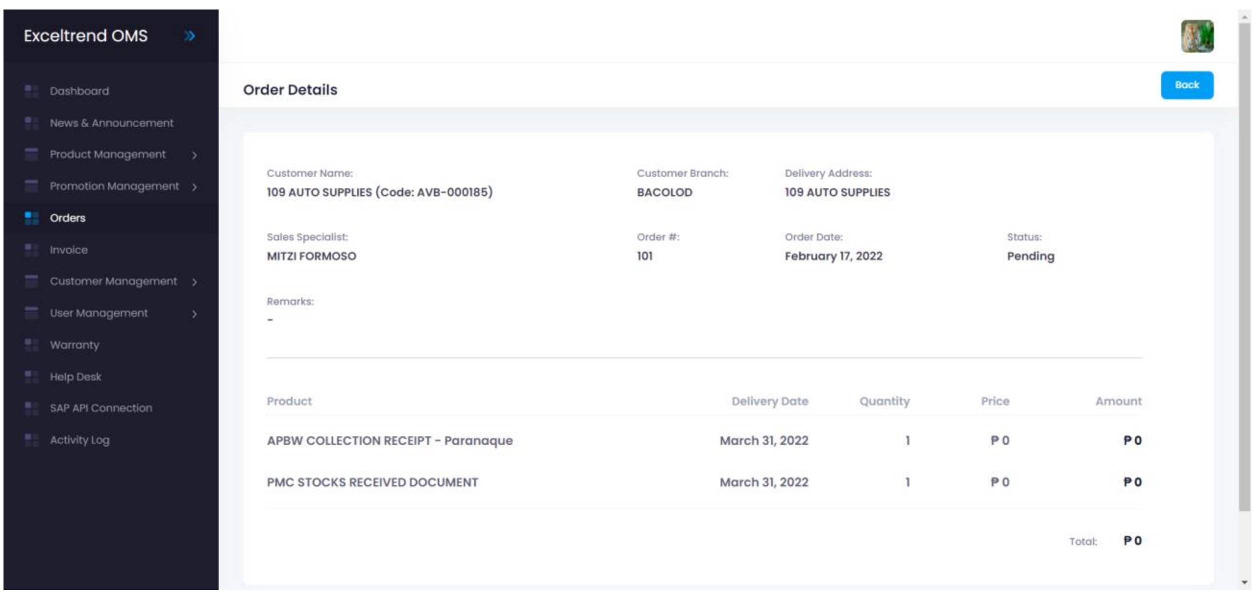


4.2 Steps: - How to view the orders.

- Steps 1: - Click on eye icon.

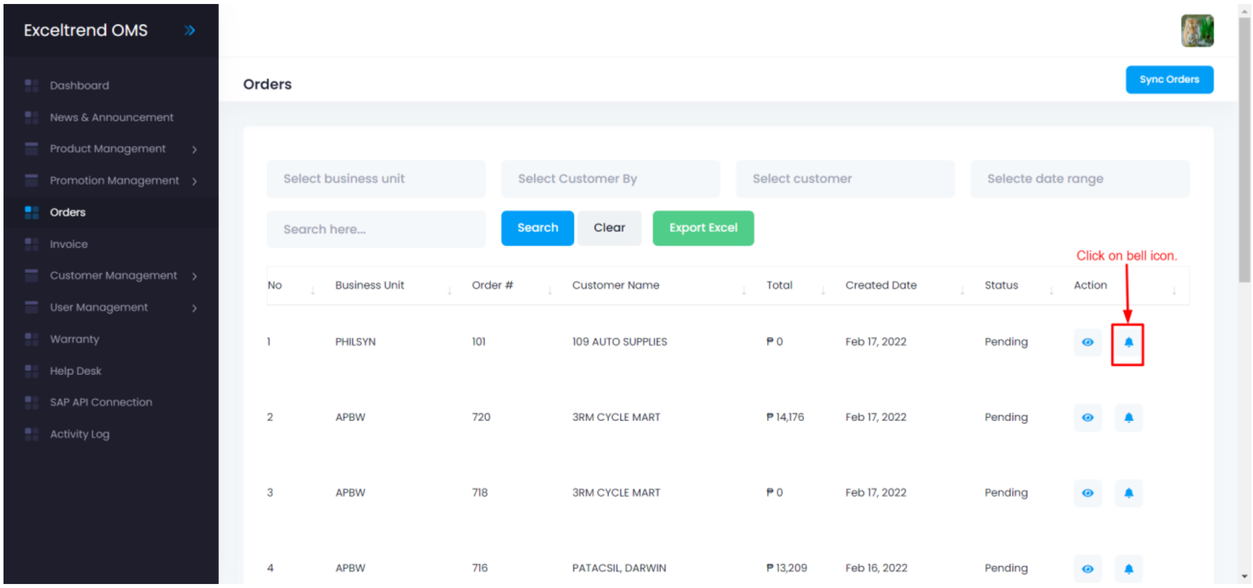


- Steps 2: - Orders details are displayed in orders view page.

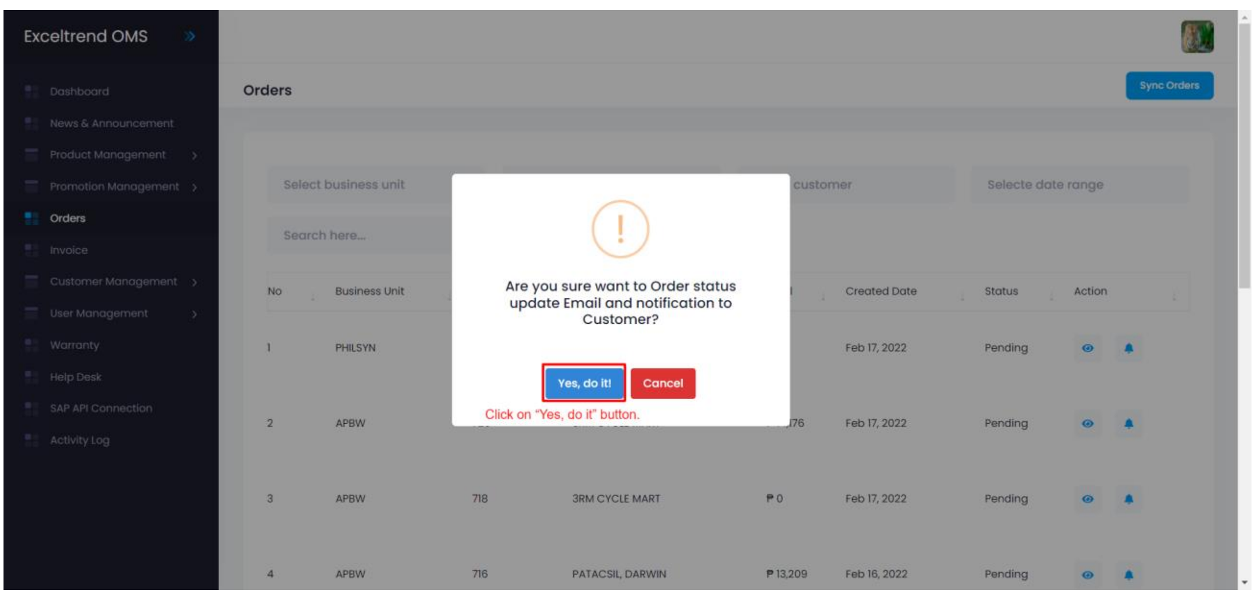


4.3 Steps: - How to notify the customer orders status.

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



- 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.



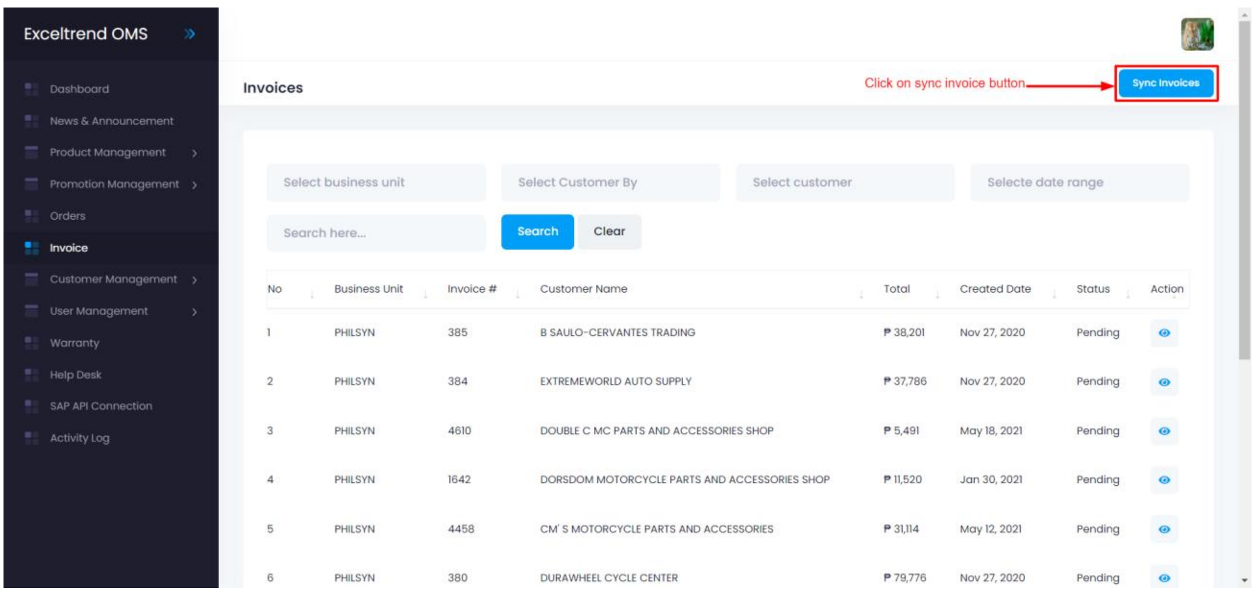
5. Invoice: -

- Admin can sync the order data over here.
- Admin view the orders.

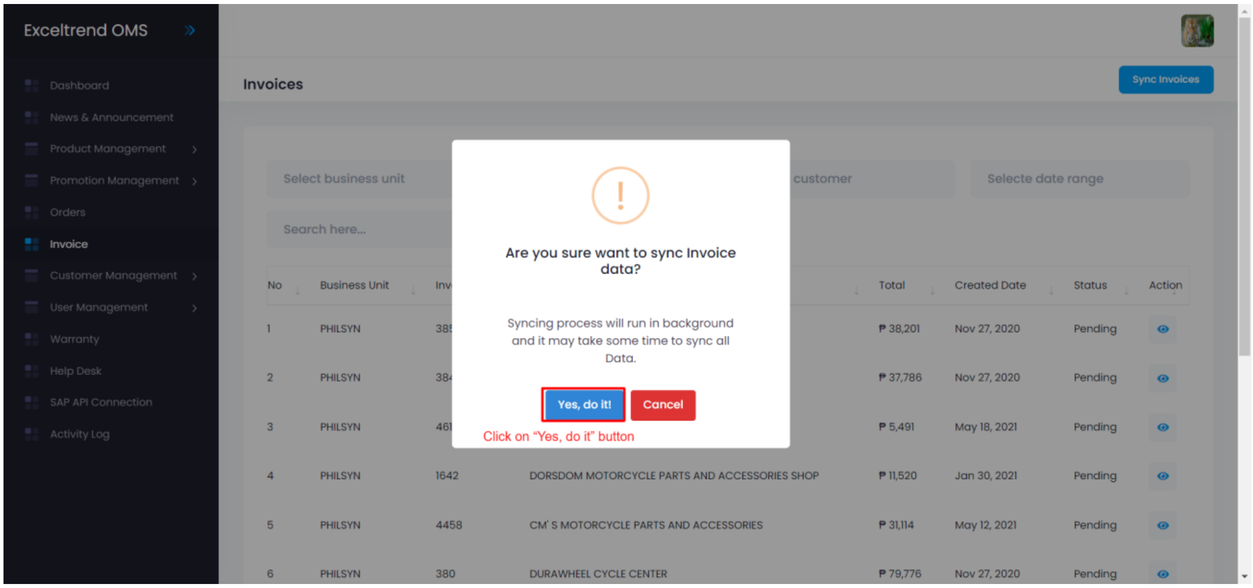
- Admin can notify the customer orders notification.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Admin can export the order data.
- Video Link: - https://www.screencast.com/t/mic1Ky0Nl

5.1 Steps: -How to sync order data.

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

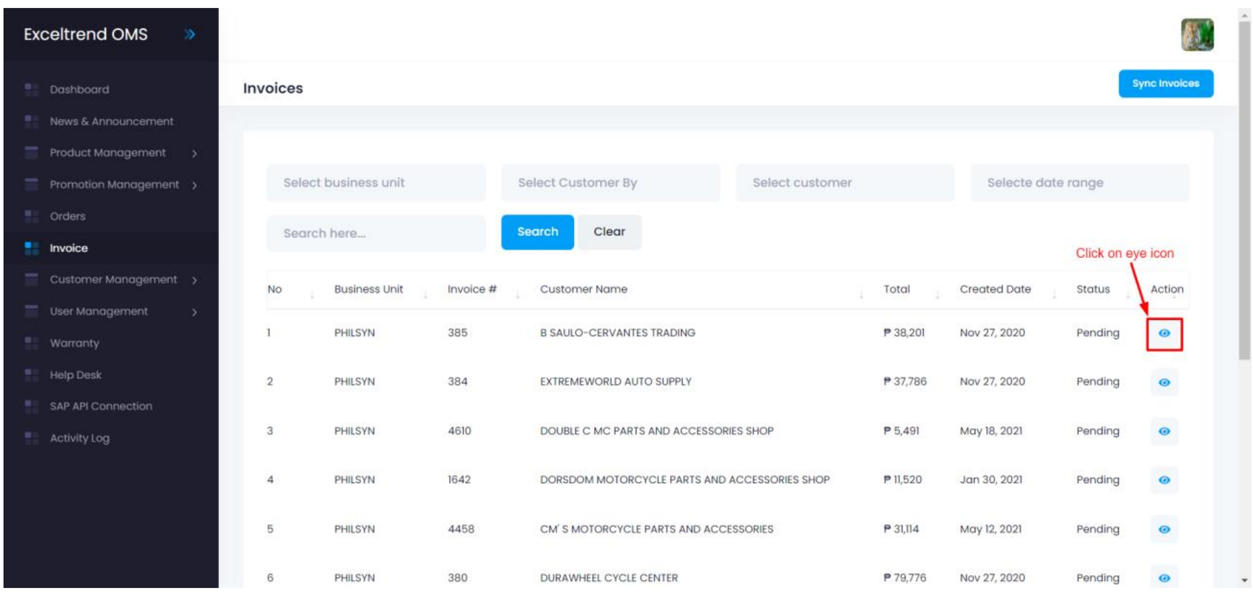


- Steps 2: - Pop-up model appear and show message “Are you sure you want to sync invoice data?” and click on “Yes, do it” button that time loader should be load after the message displayed sync invoice successfully.

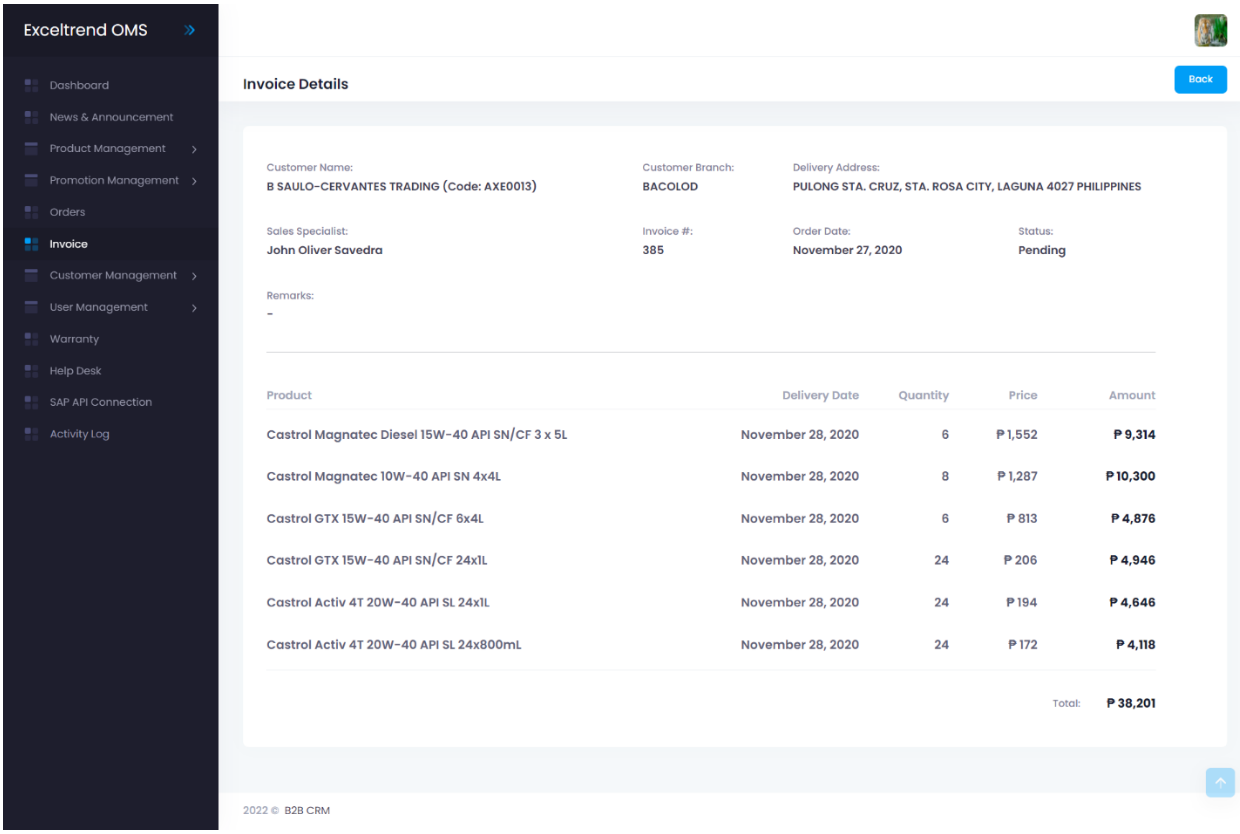


5.2 Steps: - How to view the invoice.

- Steps 1: - Click on eye icon.



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



6. Customer Management Module: -

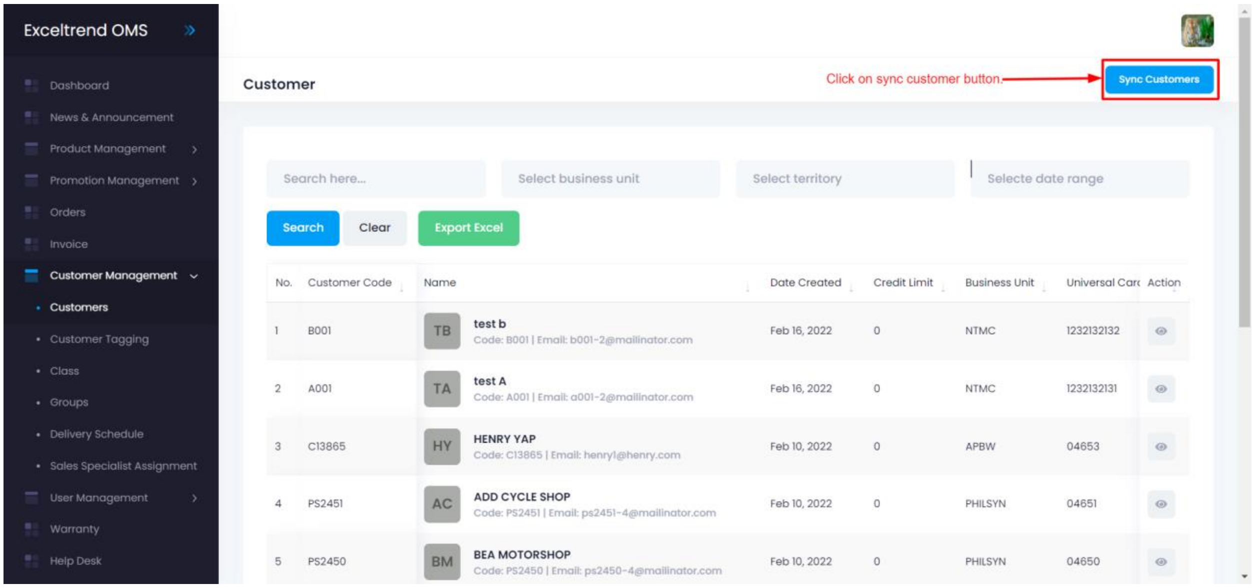
- There are six sub modules in this module and all modules explain in details one by one.
  - Customer.
  - Customer Tagging.
  - Class.
  - Groups.
  - Delivery Schedule.
  - Sales Specialist Assignment.

6.1 Customers: -

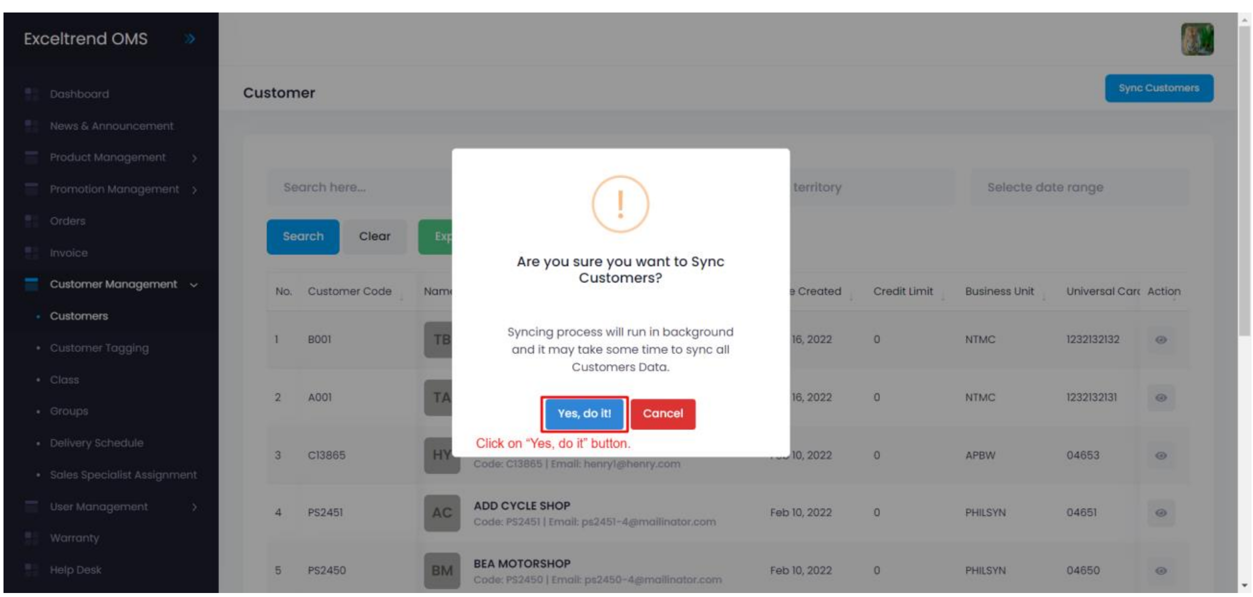
- Admin can sync the customers data over here.
- Admin view the customers details over here.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Admin can export the order data.
- Video link: - https://www.screencast.com/t/JUscZ168

6.1.1 Steps: -How to sync customers data.

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

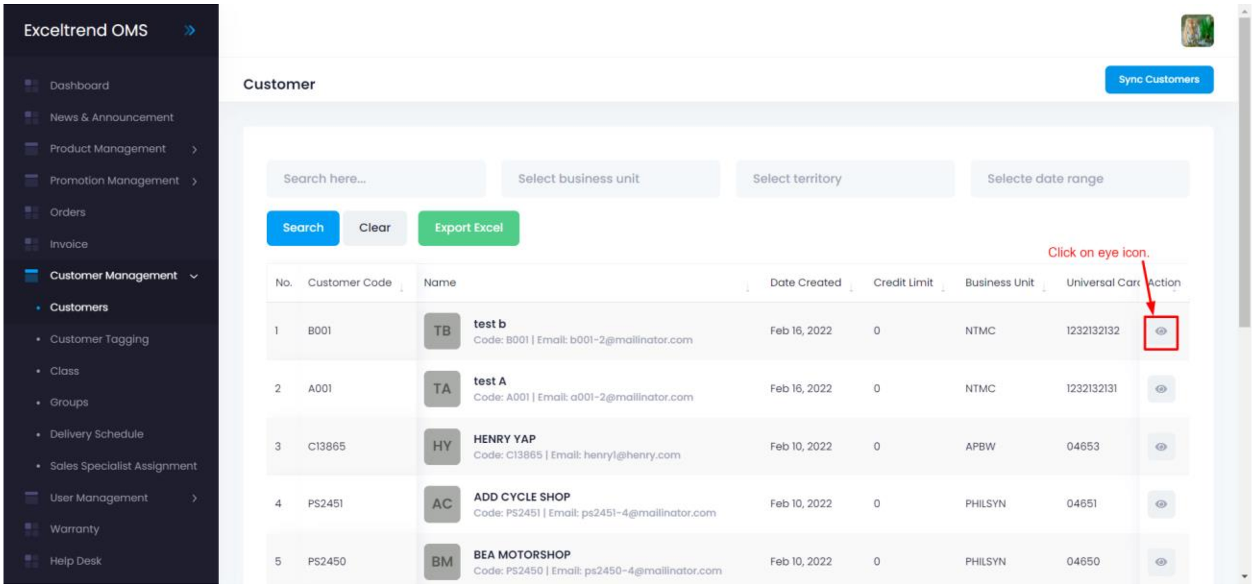


- Steps 2: - Pop-up model appear and show message “Are you sure you want to sync invoice data?” and click on “Yes, do it” button that time loader should be load after the message displayed sync invoice successfully.

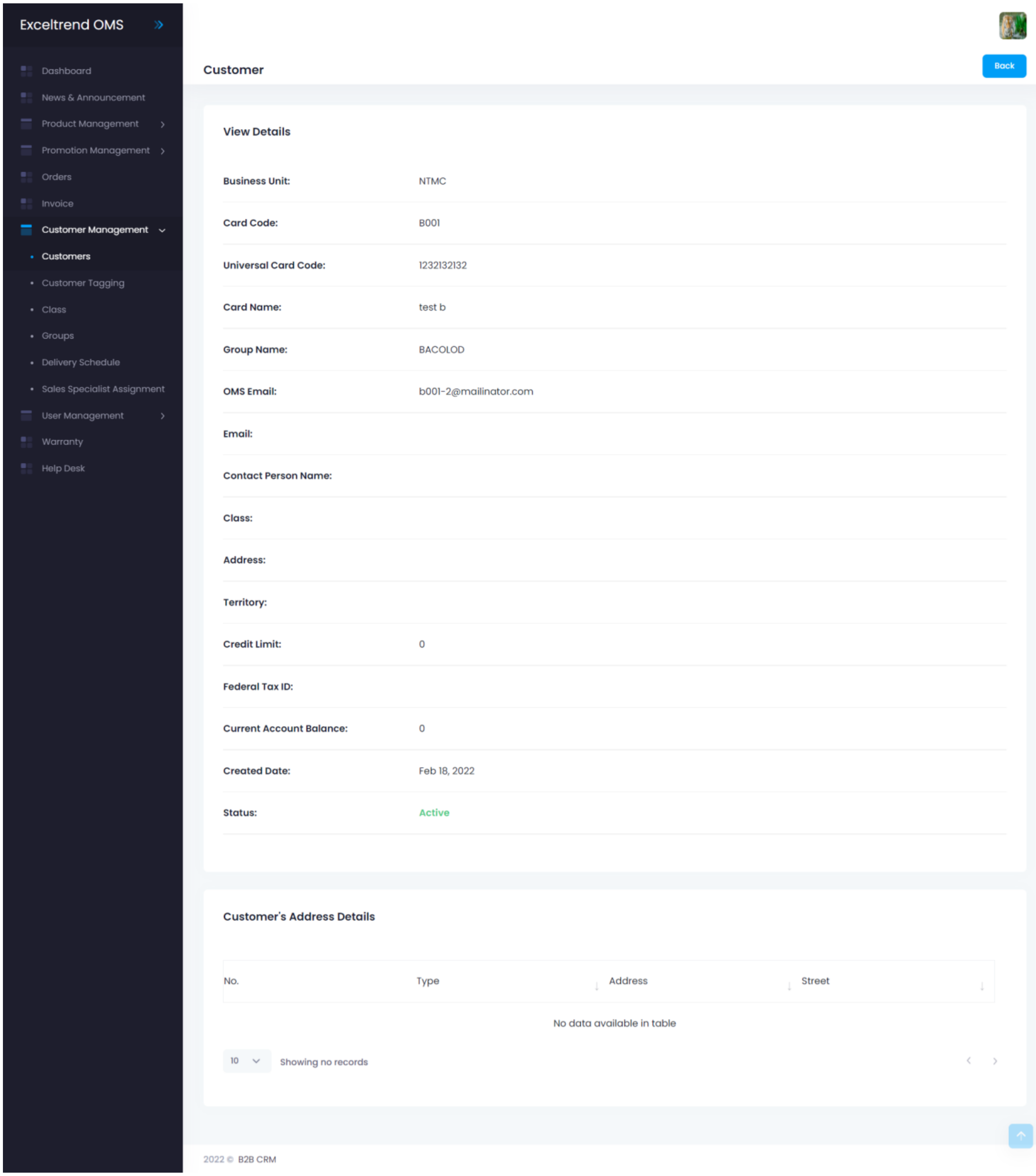


6.1.2 Steps: - How to view the Customer details.

- Steps 1: - Click on eye icon.



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



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

6.3 Class: -

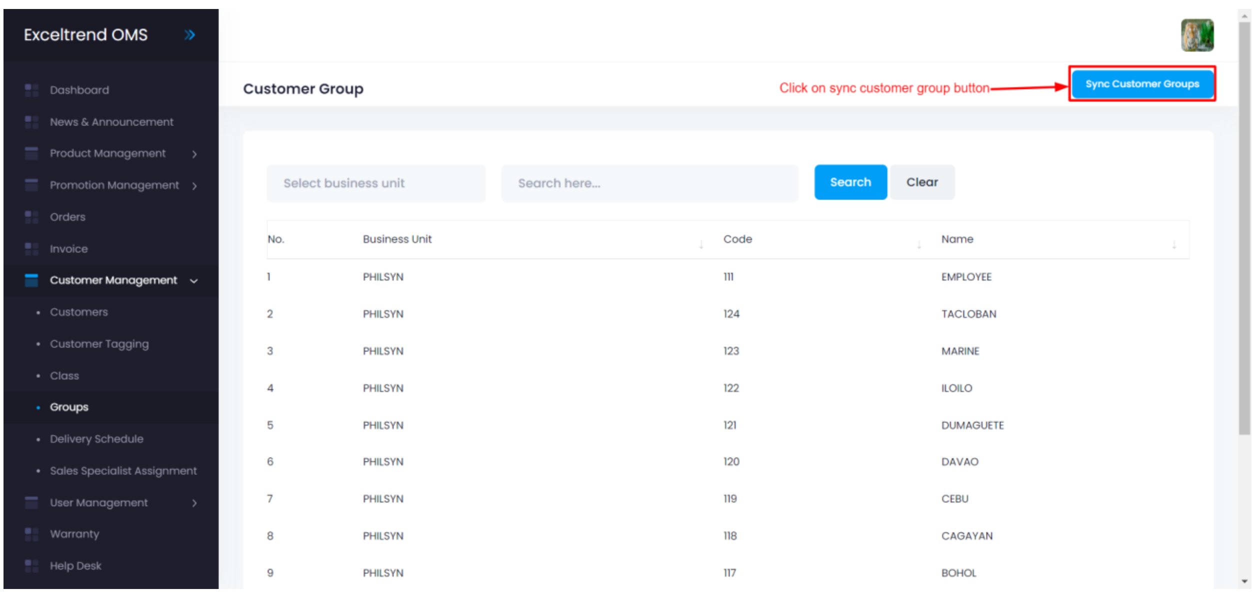
- Admin view the customer class over here.
- Admin can search the data using the search box.
- Video Link: - https://www.screencast.com/t/jgCkBxlHCYD

6.4 Groups: -

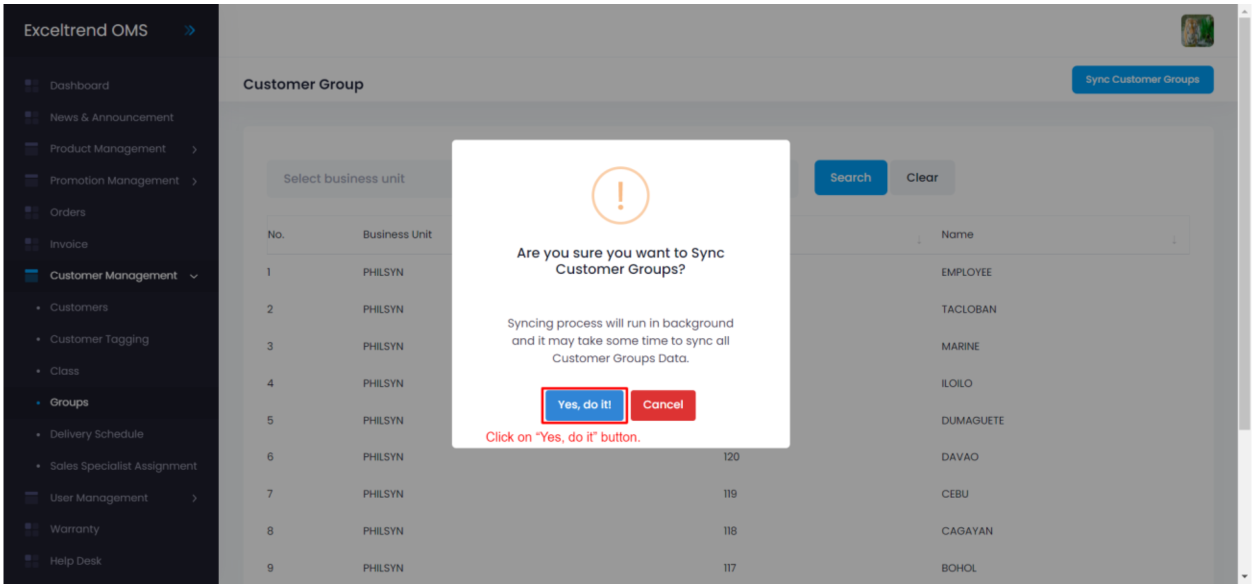
- Admin can sync the customers group data over here.
- Admin view the customers group details over here.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Video link: - https://www.screencast.com/t/sP2mkhpU

6.4.1 Steps: - How to sync customers group data.

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



- 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.

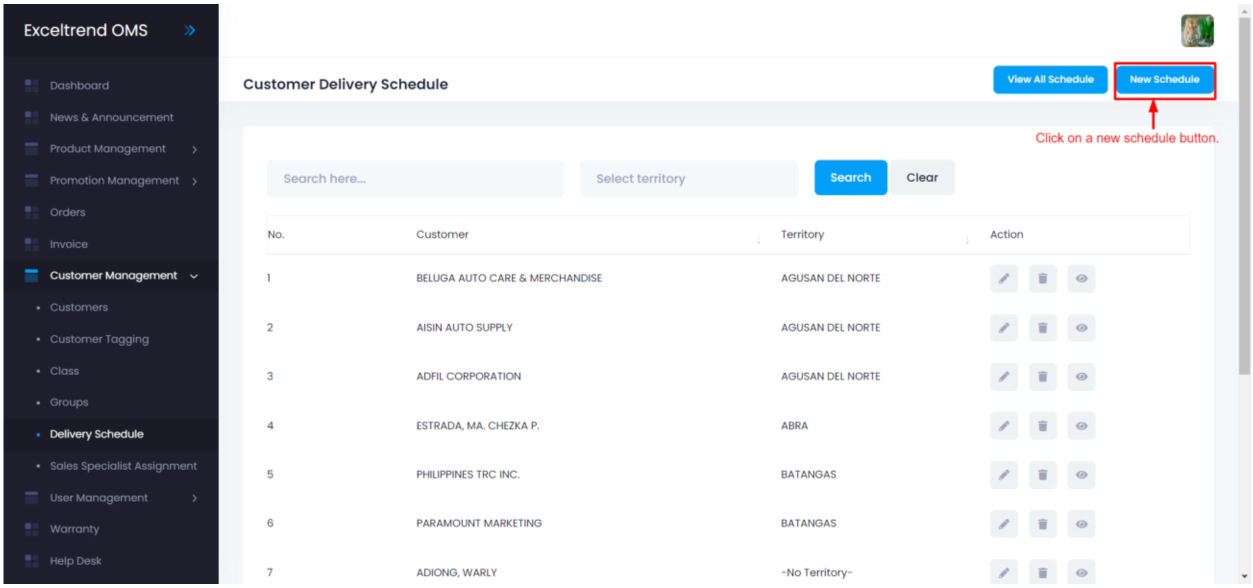


6.5 Delivery Schedule: -

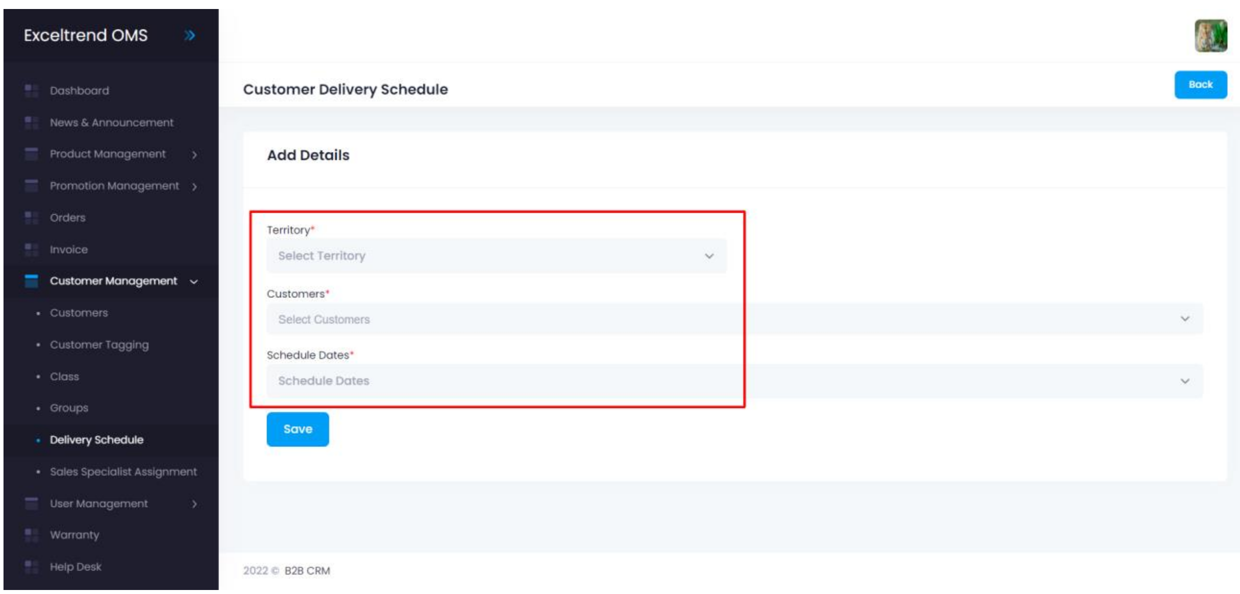
- Admin can create, edit, update and delete the customer delivery schedule.
- Admin can search the data using search box.
- Admin can use the different-different filter and filter the data.
- Video Link: - https://www.screencast.com/t/d3KqvwXTCe

6.5.1 Steps: - How to create a customer delivery schedule.

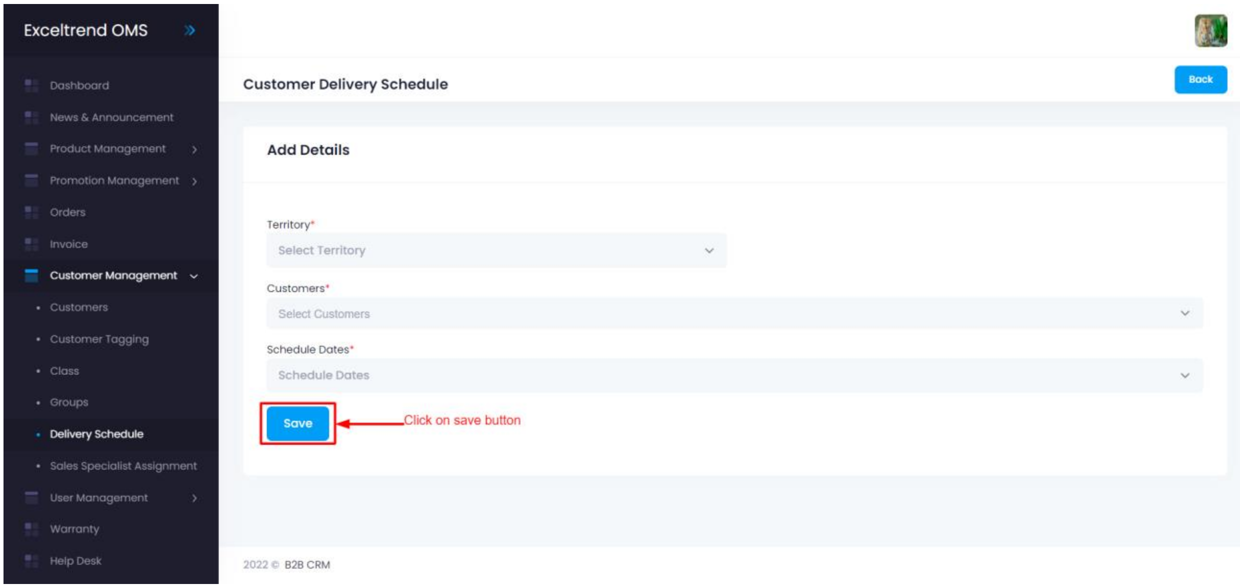
- Steps 1: - Click on new schedule button.



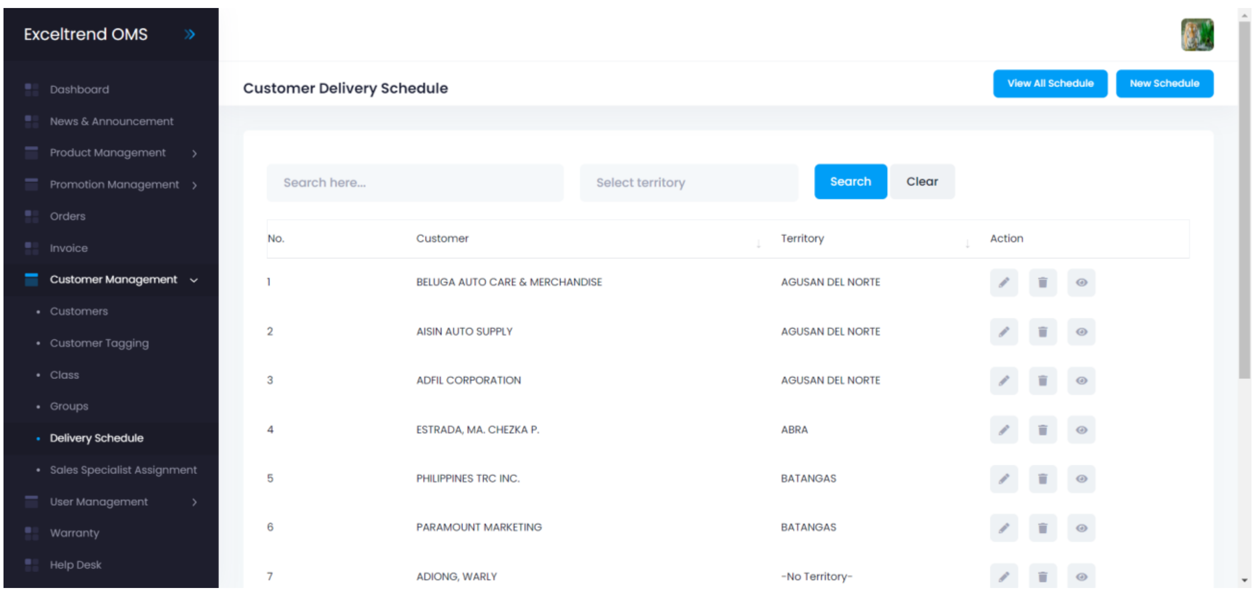
- Steps 2: - Select the territory, select the customers, and select the schedule dates.



- Steps 3: - Click on save button.

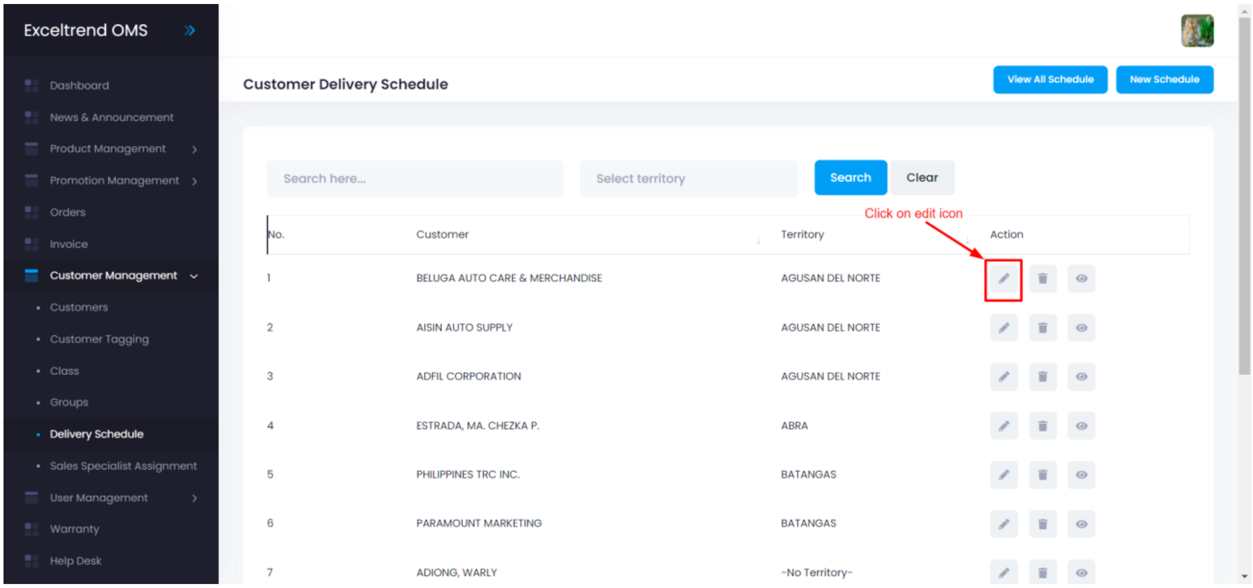


- Steps 4: - Created delivery schedule is display in listing page.

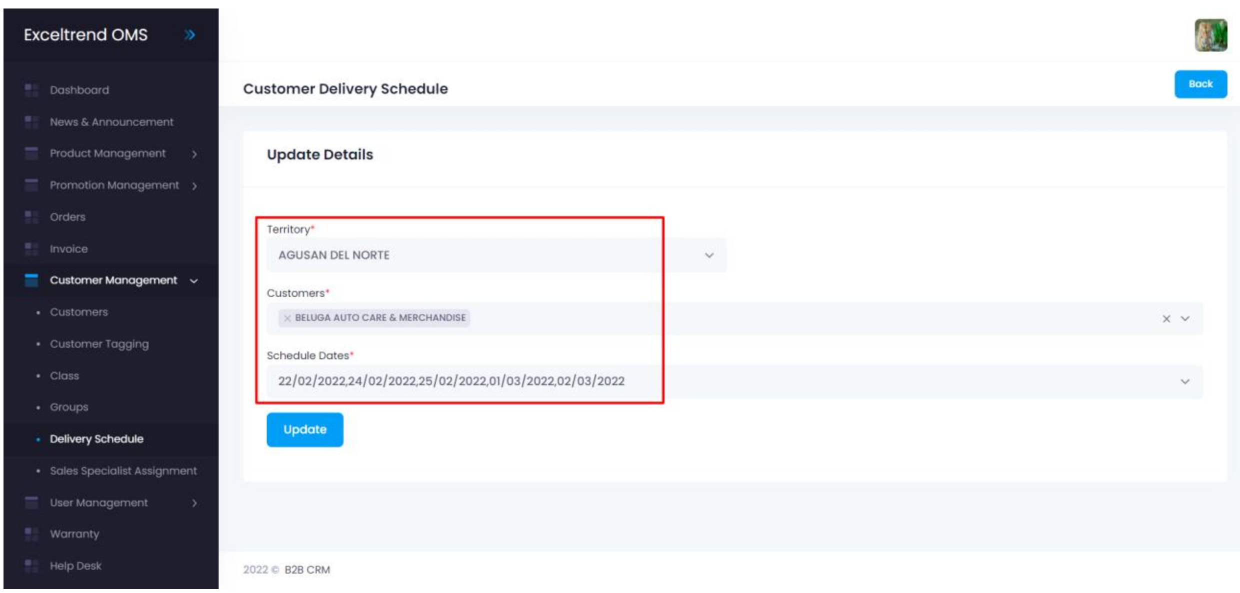


6.5.2 Steps: - How to edit the delivery schedule.

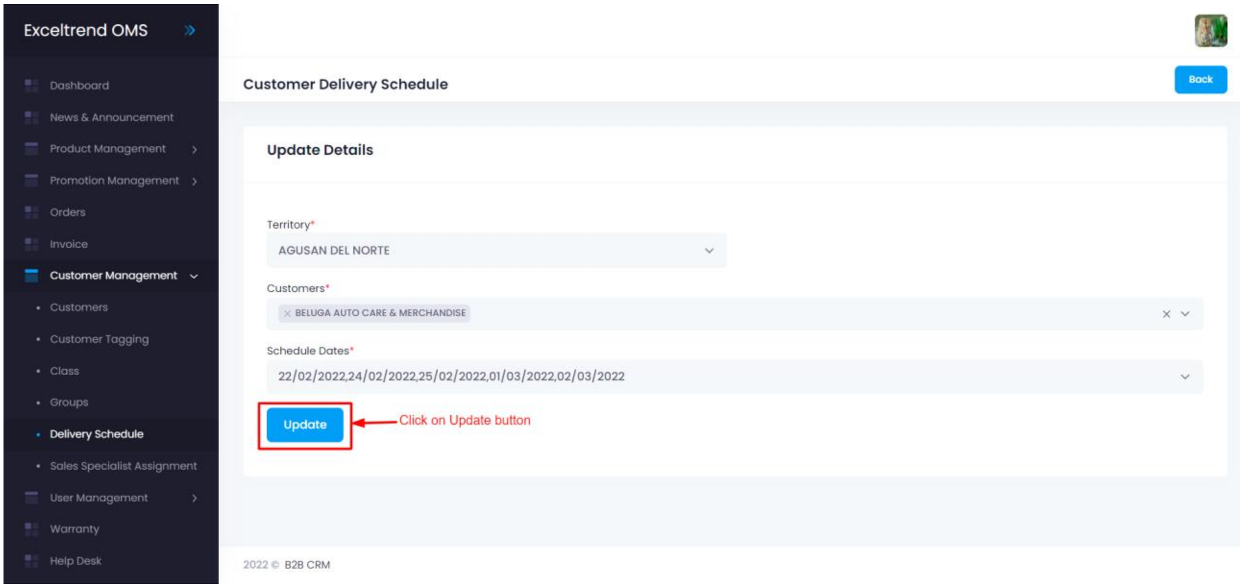
- Steps: - 1 Click on edit icon.



- Steps: - 2 Update the data.

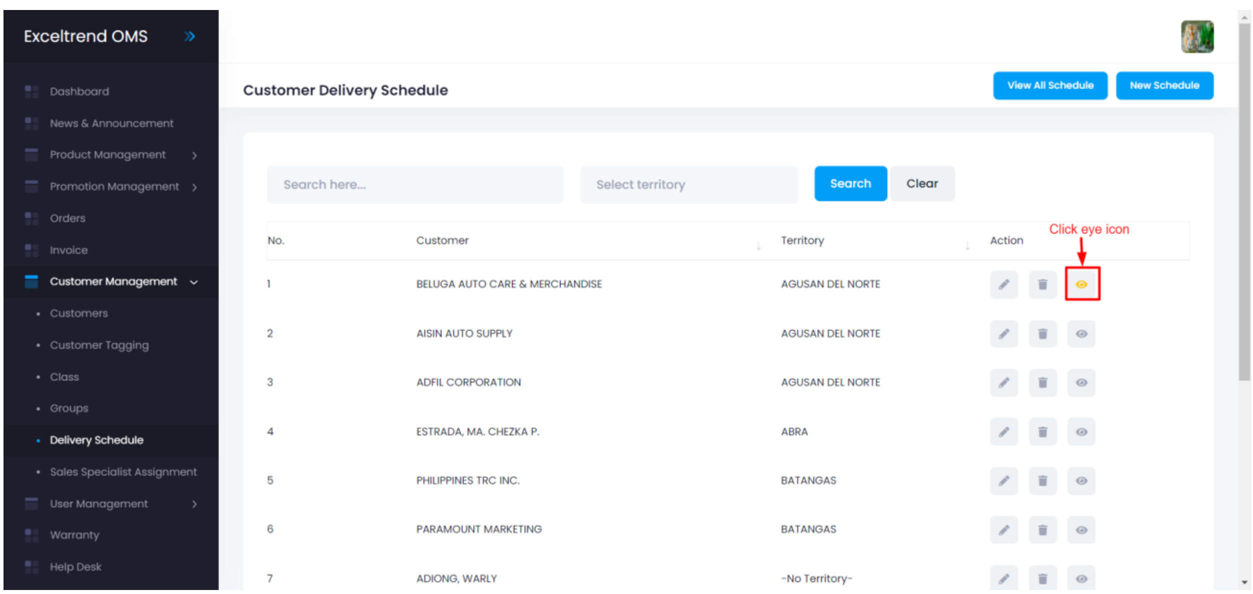


- Steps: - 3 Click on Update button.

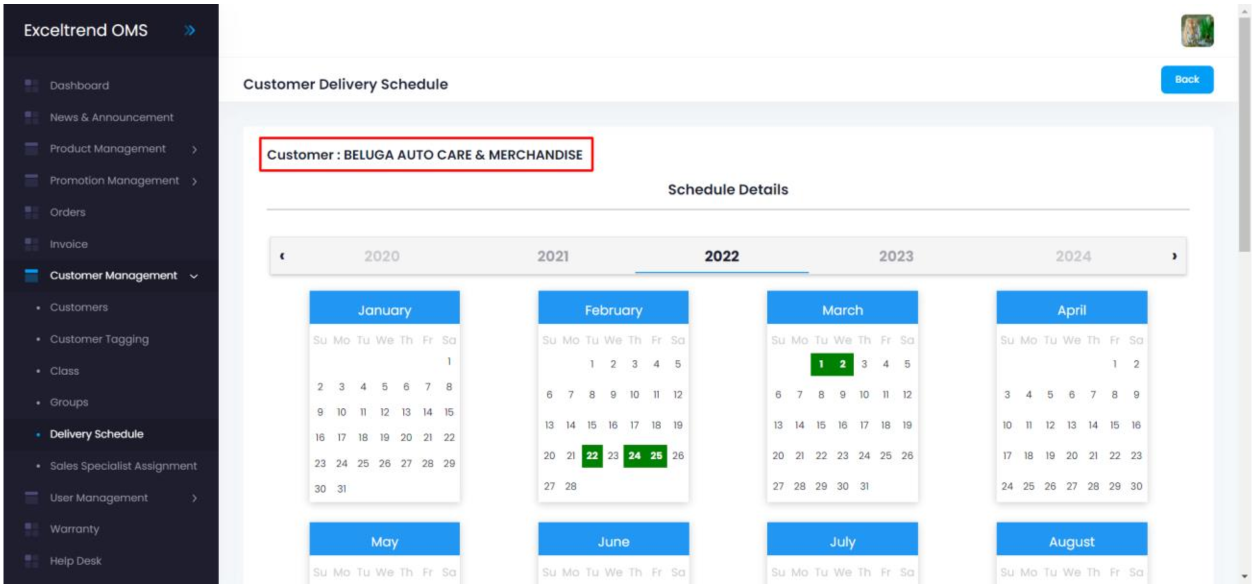


6.5.3 Steps: - How to view the delivery schedule.

- Steps 1: - Click eye icon.

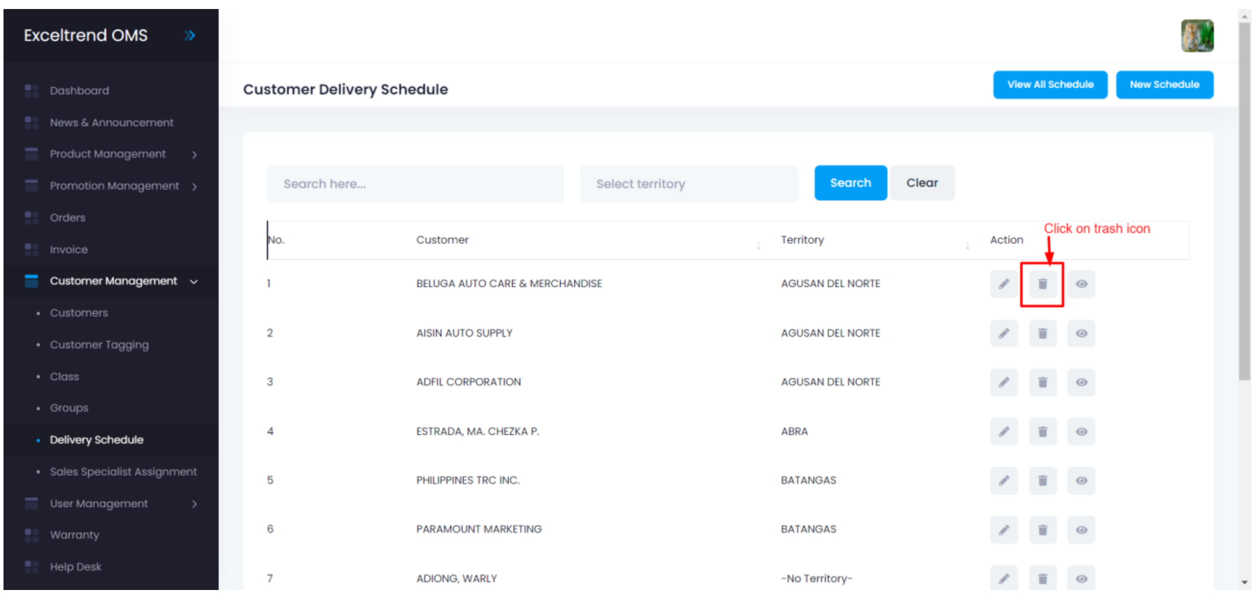


- Steps 2: - All schedule date show for particular customer over here.

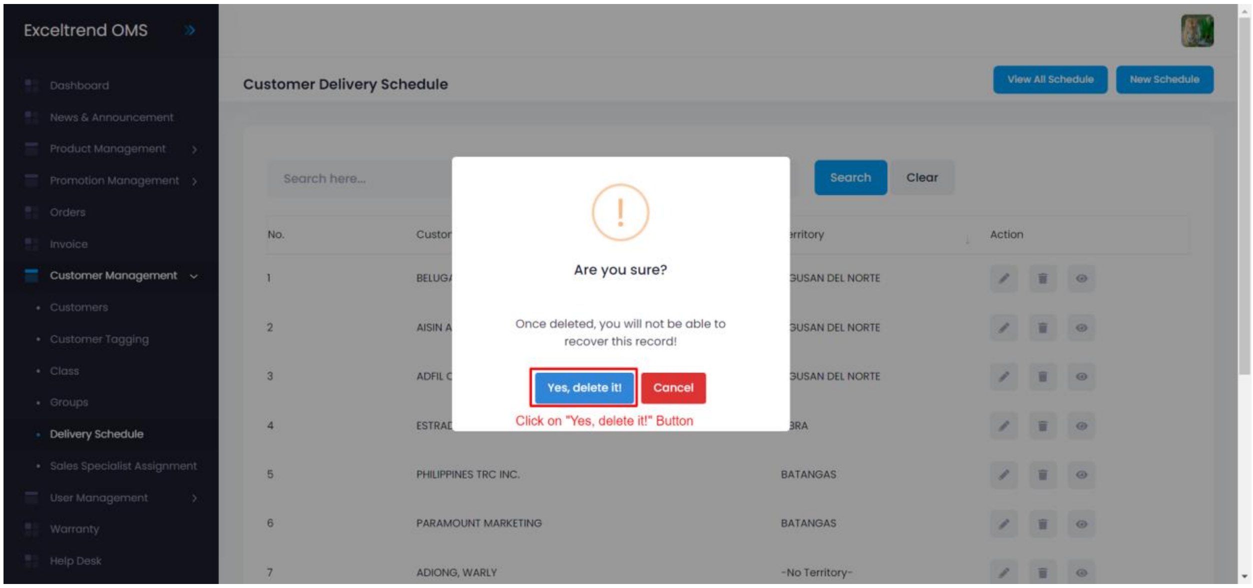


6.5.4 Steps: - How to delete the delivery schedule.

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

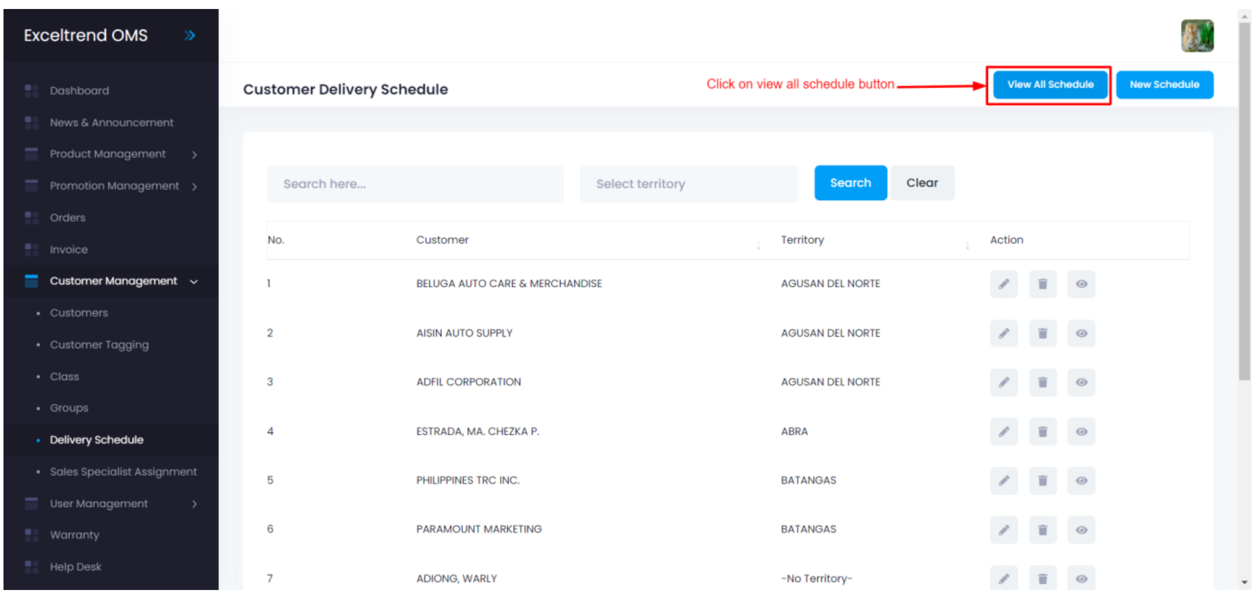


- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.

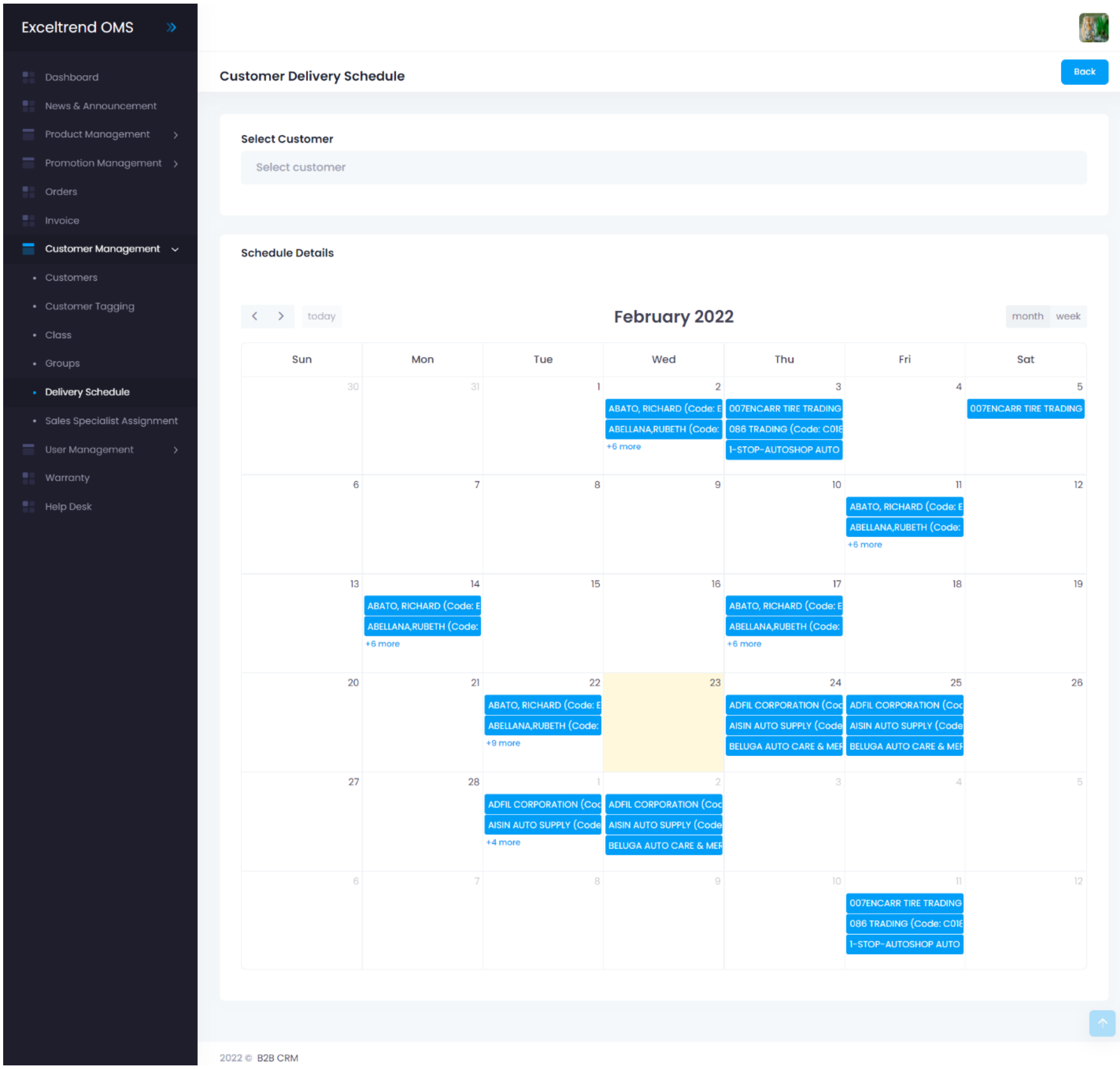


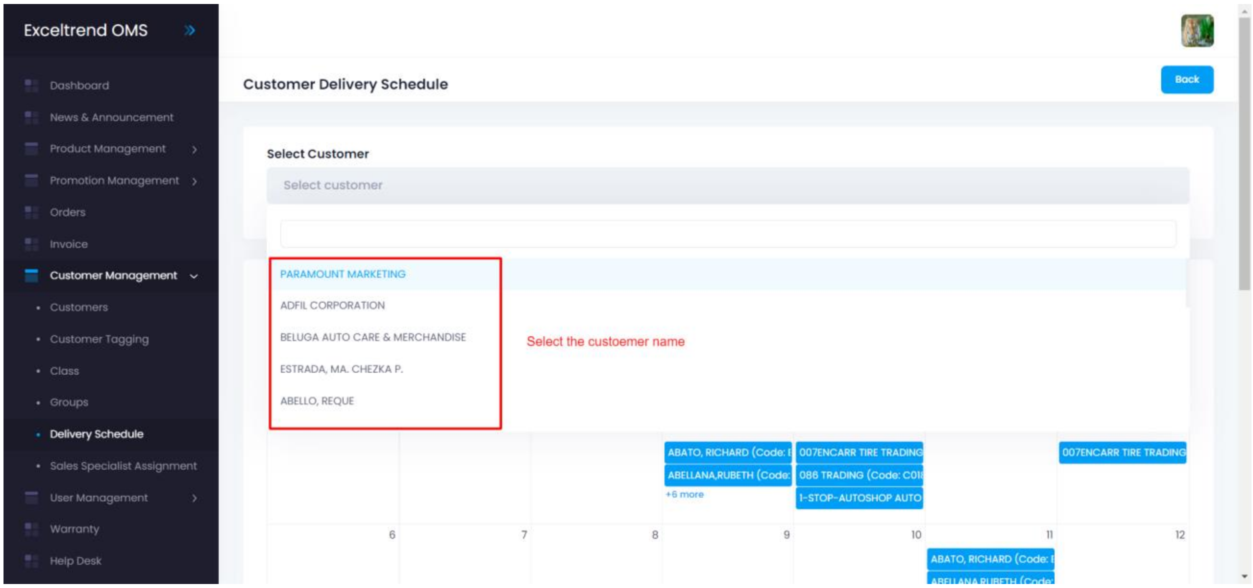
6.5.5 Steps: - How to view all delivery schedule

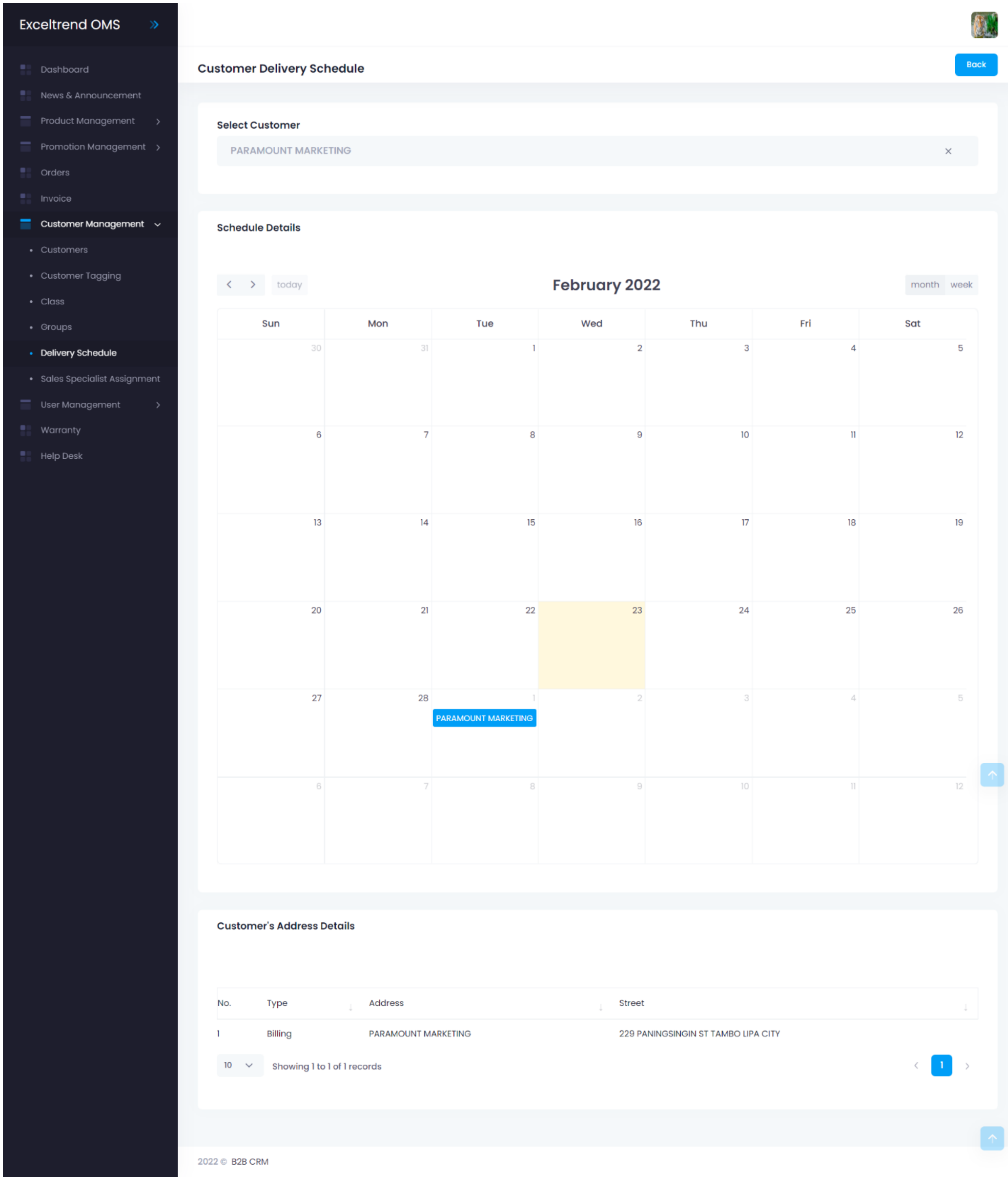
- Steps 1: - Click on view all schedule button.



- 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
Back
Select Customer
Select customer
Schedule Details
today
February 2022
month
week
Sun
Mon
Tue
Wed
Thu
Fri
Sat
ABATO, RICHARD (Code: E
ABELLANA,RUBETH (Code:
+6 more
007ENCARR TIRE TRADING
086 TRADING (Code: C01E
1-STOP-AUTOSHOP AUTO
+9 more
+4 more
ADFIL CORPORATION (Coc
AISIN AUTO SUPPLY (Code
BELUGA AUTO CARE & MEF
2022 © B2B CRM


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
Back
Select Customer
Select customer
PARAMOUNT MARKETING
ADFIL CORPORATION
BELUGA AUTO CARE & MERCHANDISE
ESTRADA, MA. CHEZKA P.
ABELLO, REQUE
Select the custoemer name



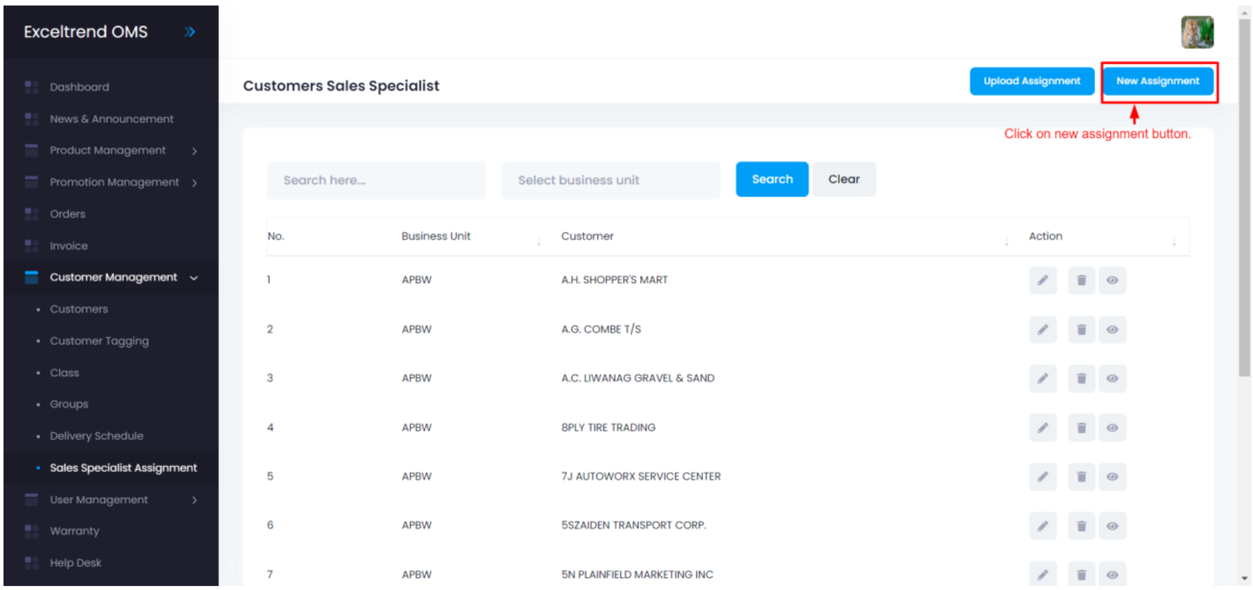
6.6 Sales Specialist Assignment: -

- 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.

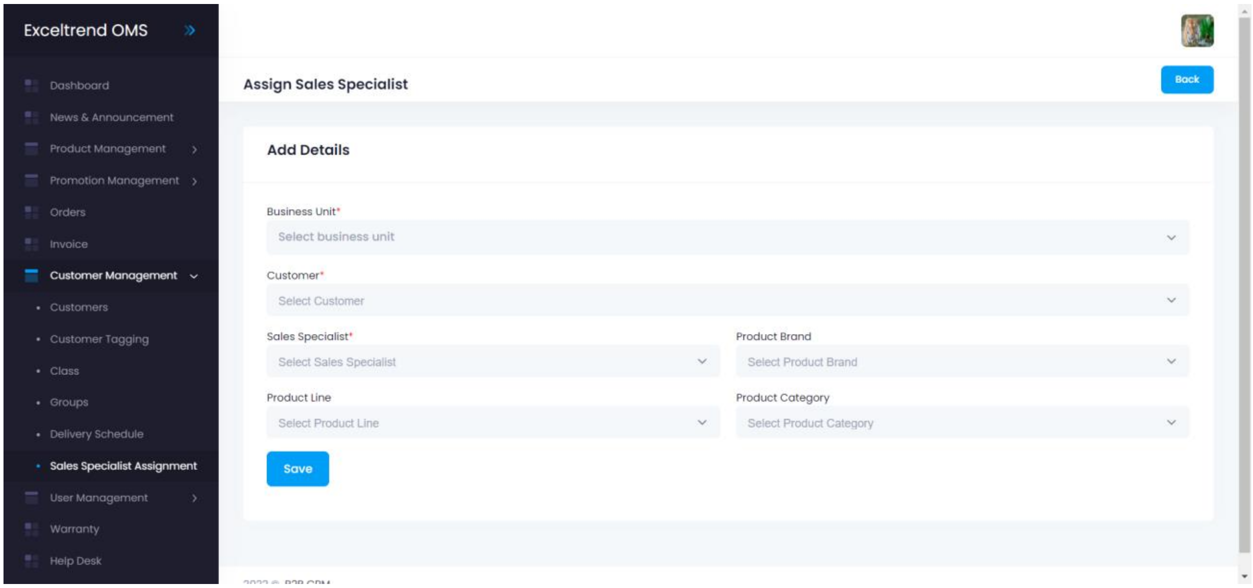
- Admin can upload the assignment using excel sheet through.
- **Video Link: -** https://www.screencast.com/t/GWUxUCdxknyH

6.6.1 Steps: - How to create a sales specialist assignment.

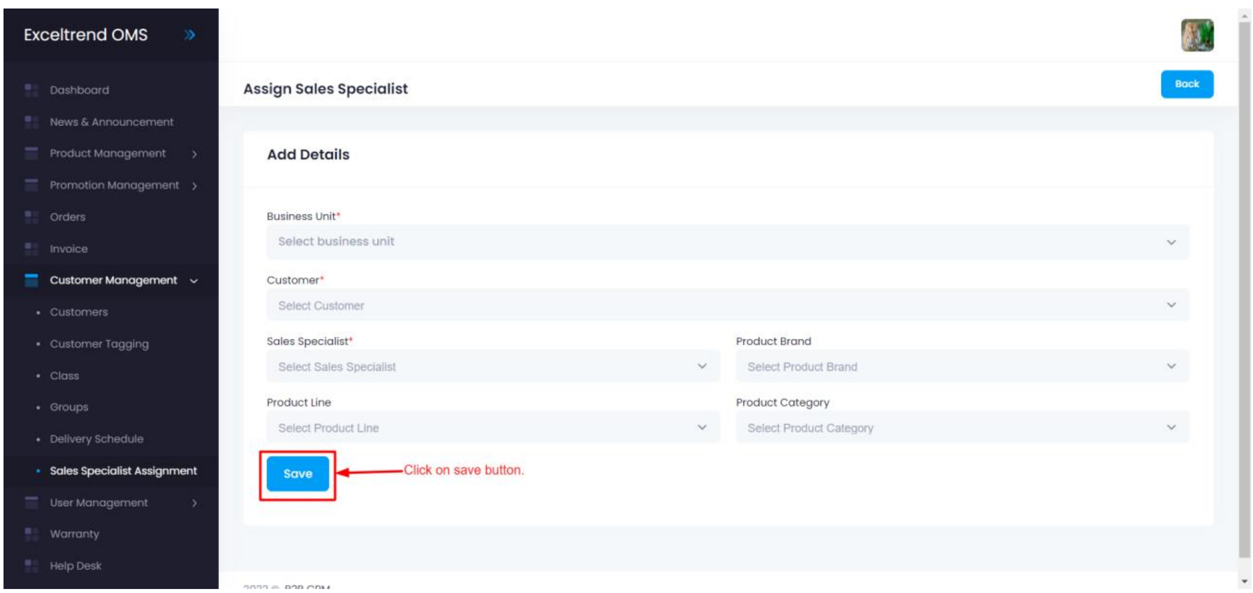
- Steps 1: - Click on new assignment button.



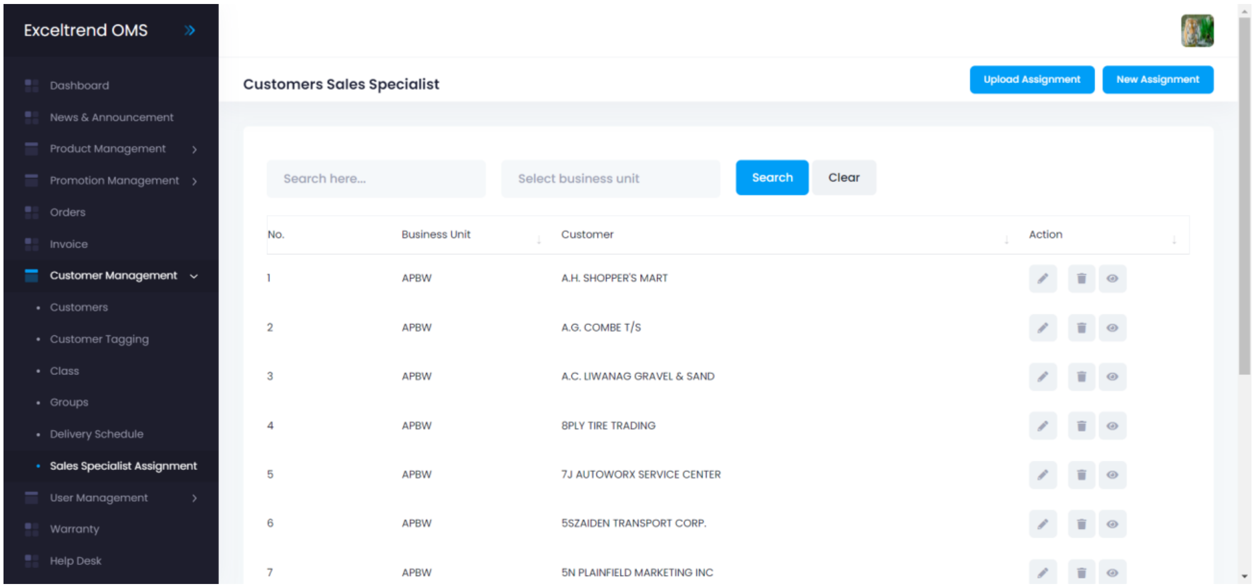
- Steps 2: - Select the business unit, select the customers, and select the sales specialist, select the product brand, line and category.



- Steps 3: - Click on save button.

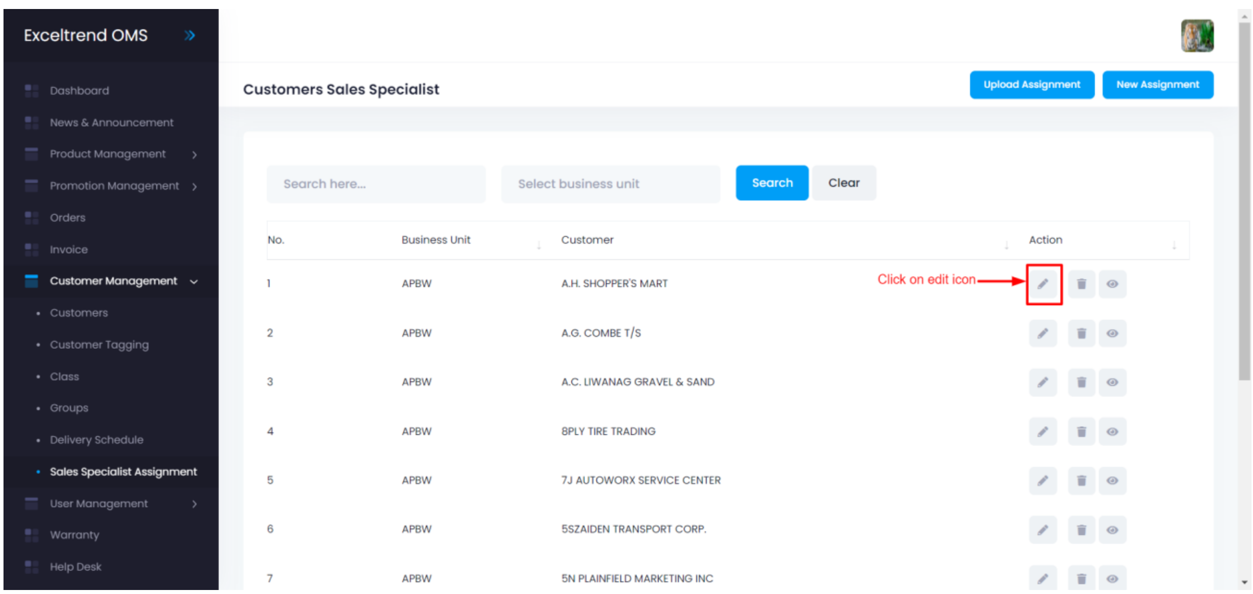


- Steps 4: - Created sales specialist assignment is display in listing page.

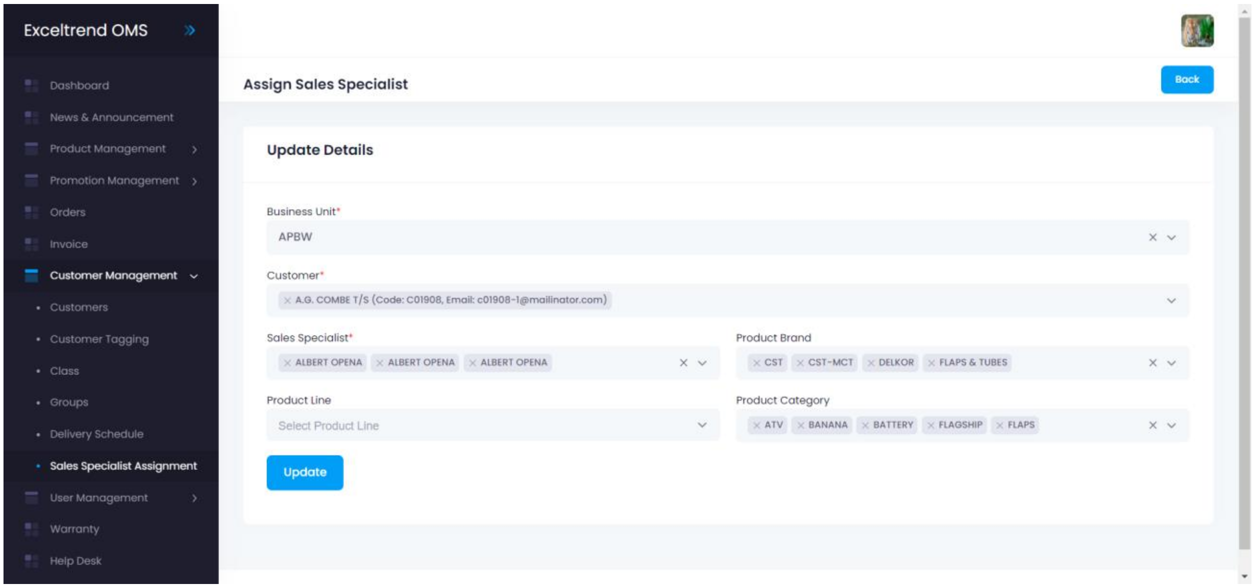


6.6.2 Steps: - How to edit the sales specialist assignment.

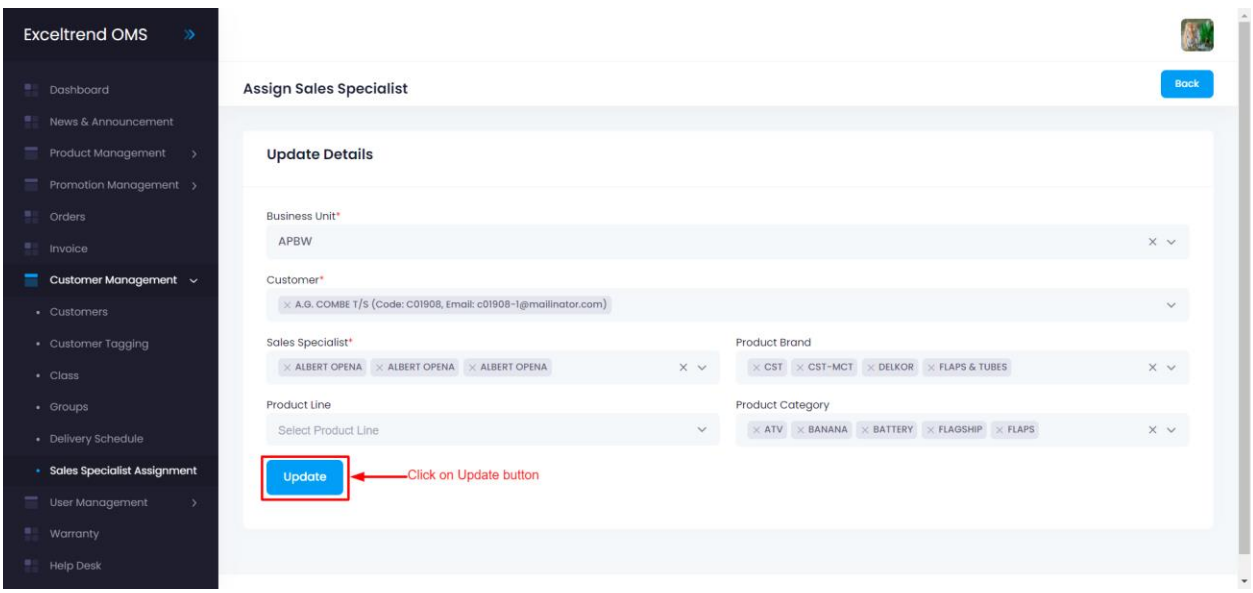
- Steps: - 1 Click on edit icon.



- Steps: - 2 Update the data.

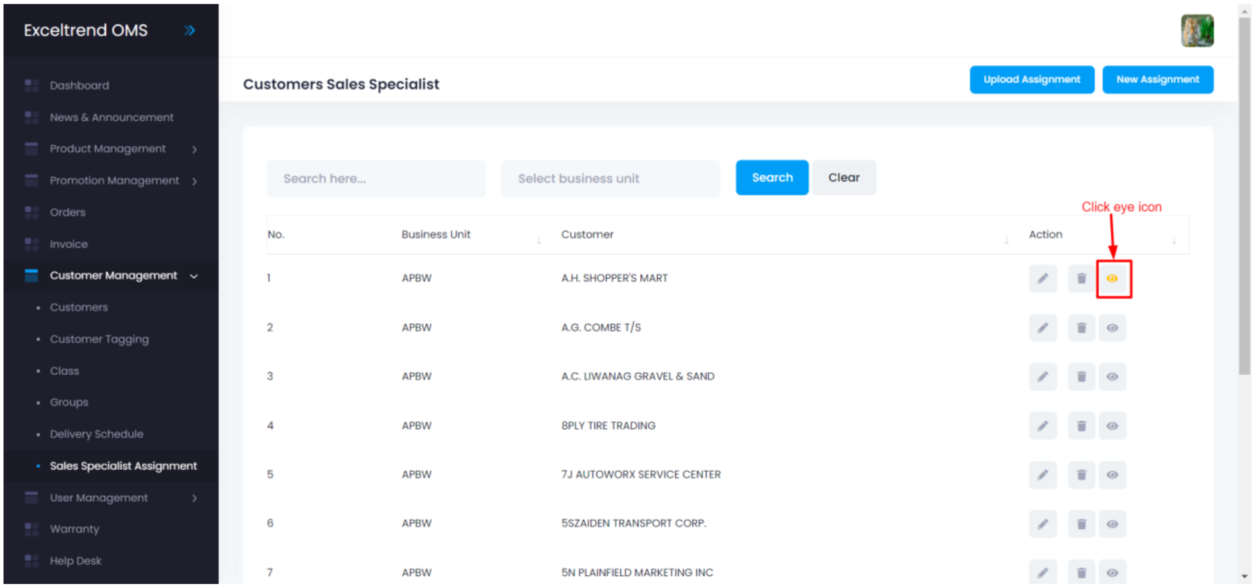


- Steps: - 3 Click on Update button.

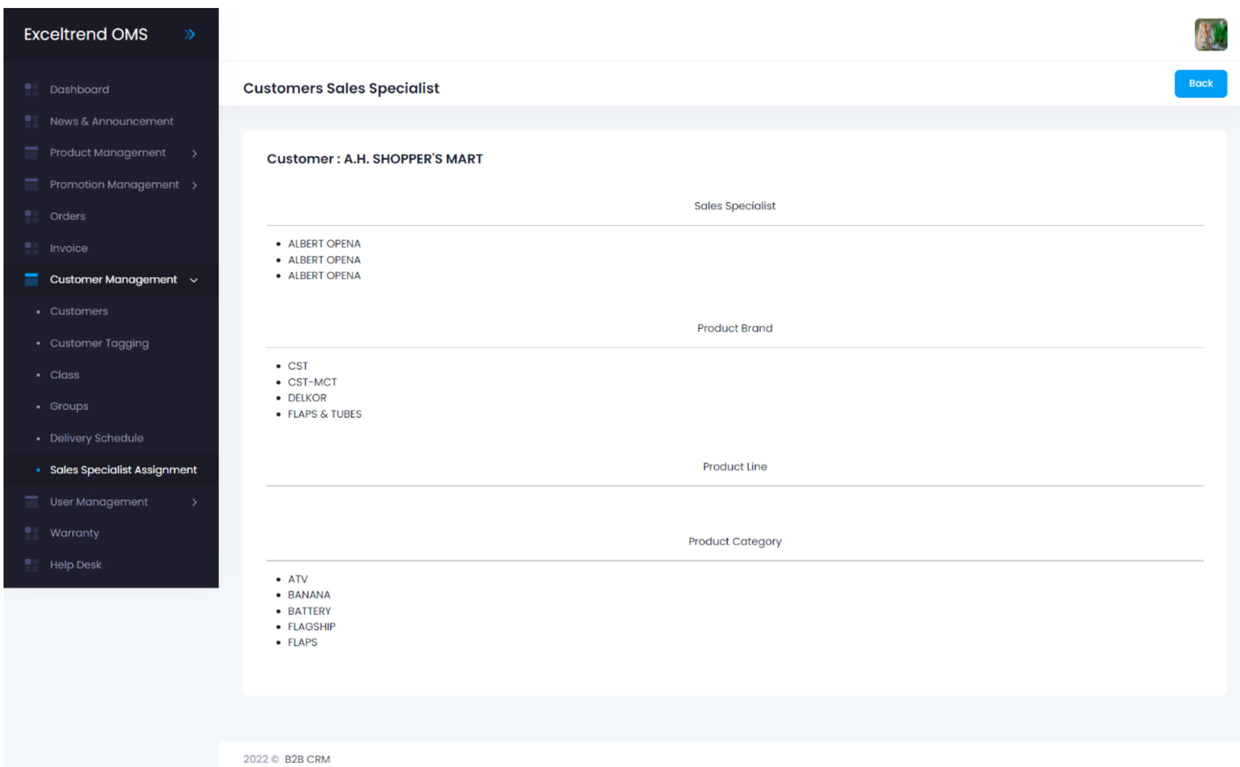


6.6.3 Steps: - How to view the sales specialist assignment.

- Steps 1: - Click eye icon.

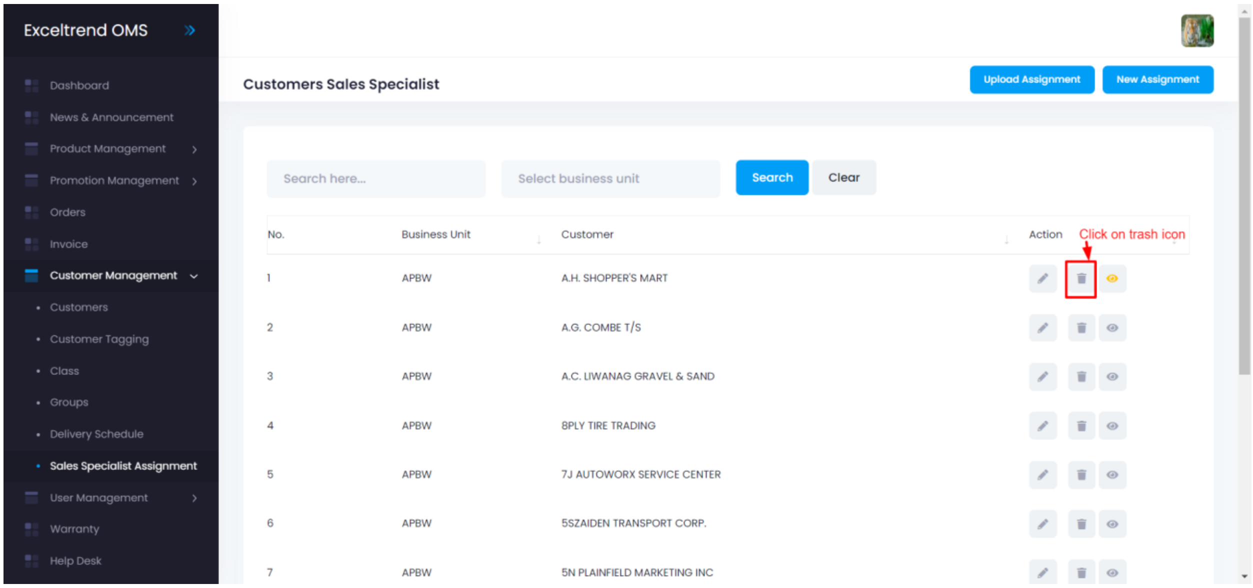


- Steps 2: - All details show in details page.

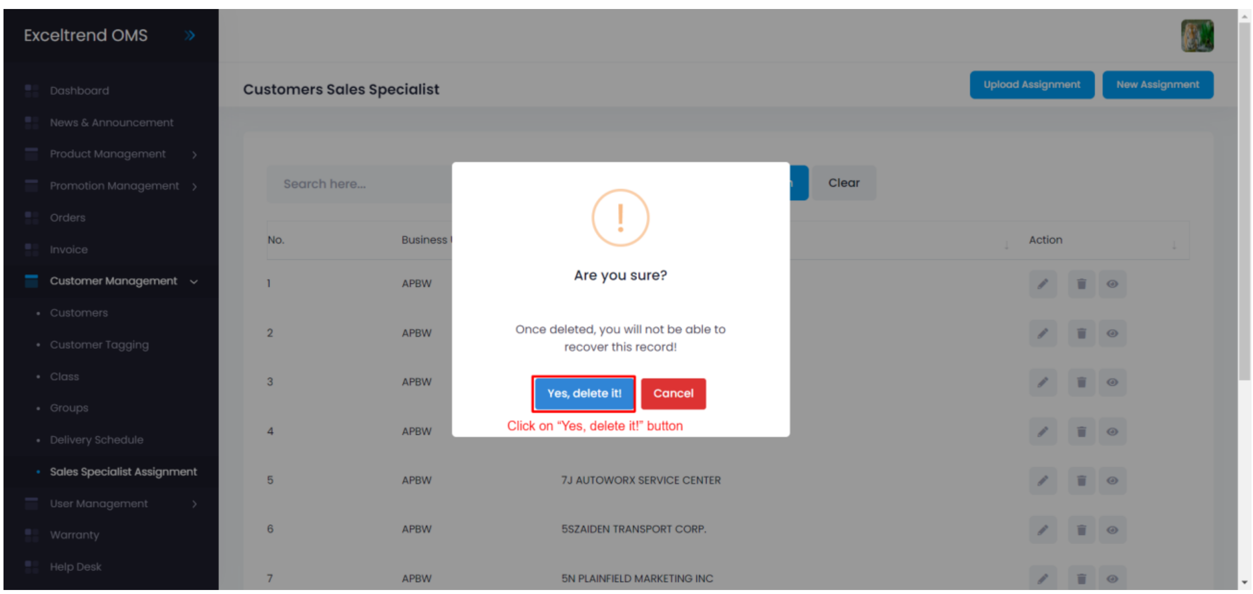


6.6.4 Steps: - How to delete the sales specialist assignment.

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

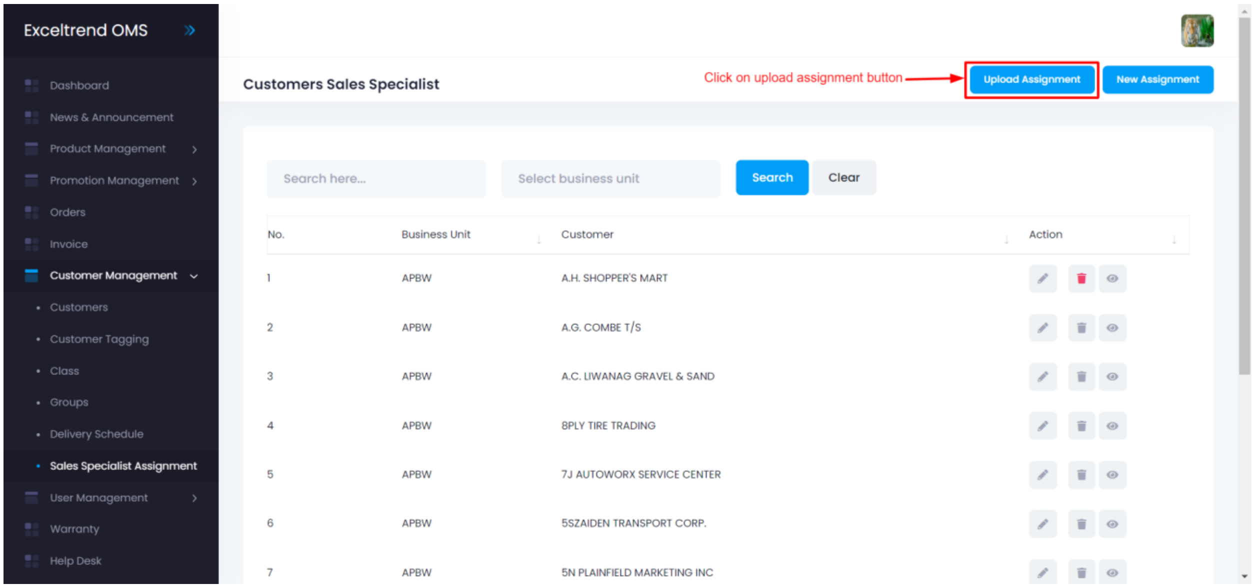


- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.

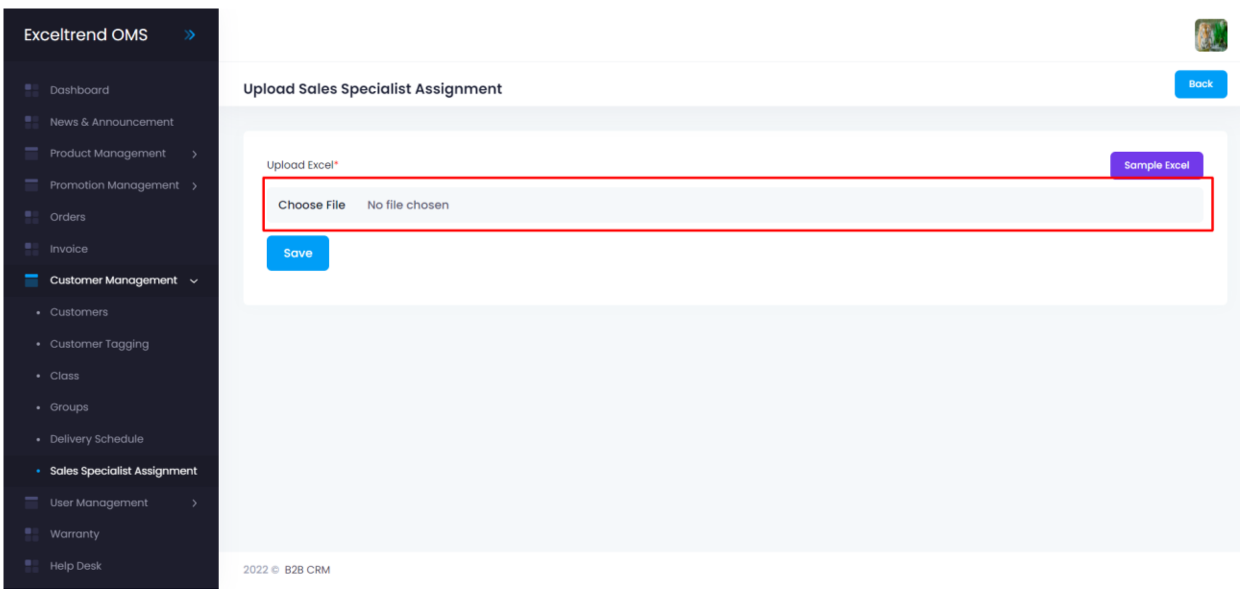


6.6.5 Steps: - How to upload assignment.

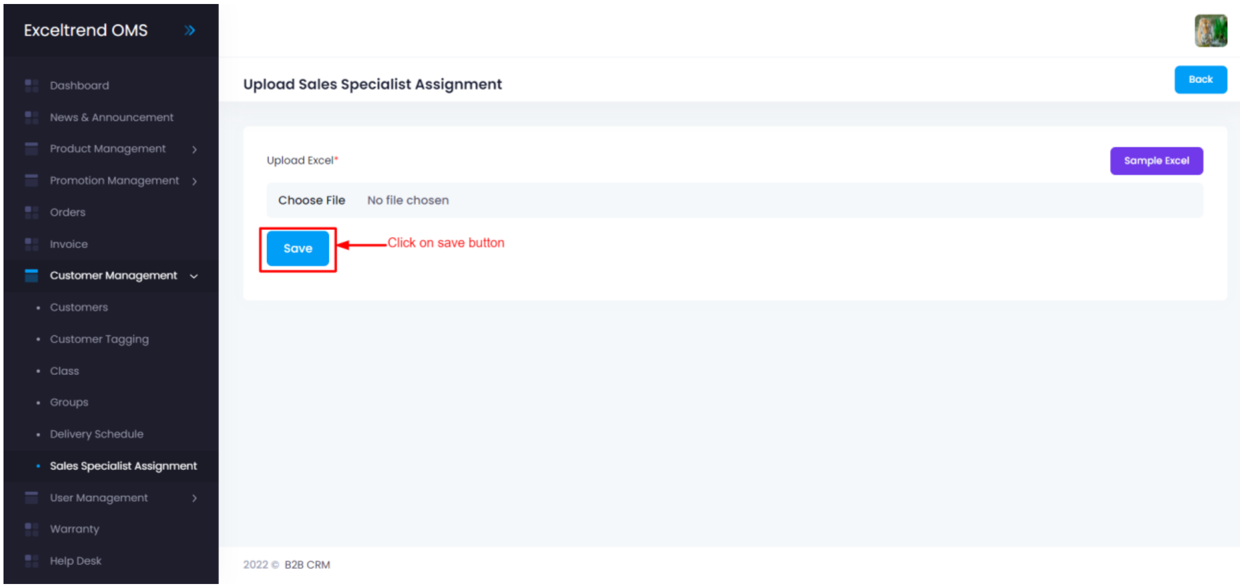
- Steps 1: - Click on upload assignment button.



- Steps 2: - Upload the excel file.



- Steps 3: - Click on save button.



7. User Management Module: -

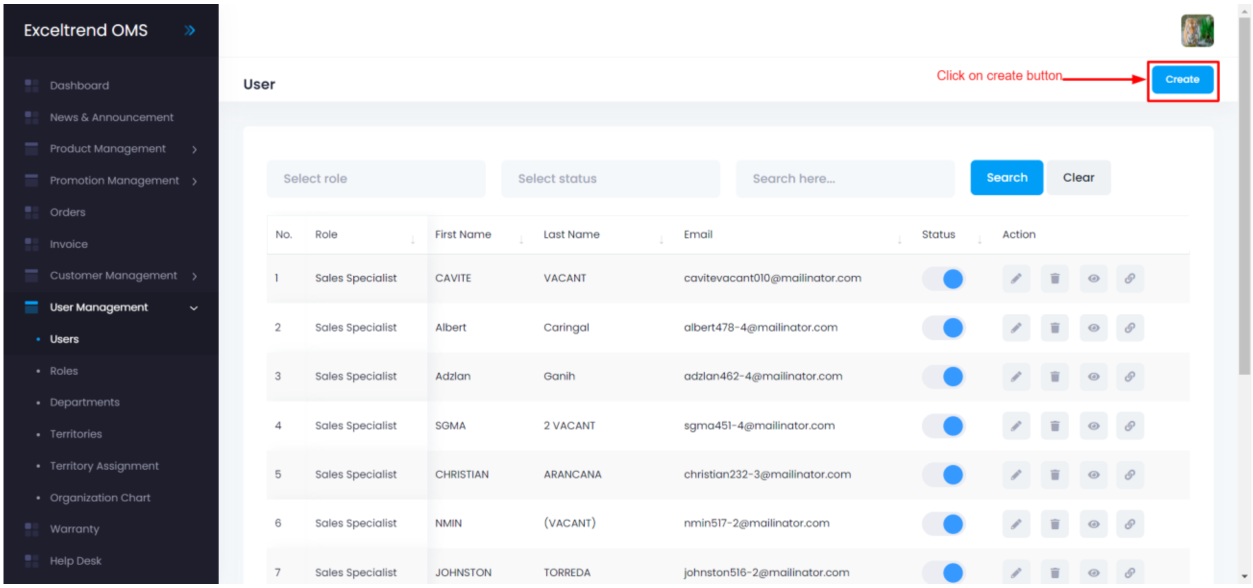
- There are five sub modules in this module and all modules explain in details one by one.
  - Users.
  - Roles
  - Department.
  - Territories.
  - Organization Chart.

7.1 User: -

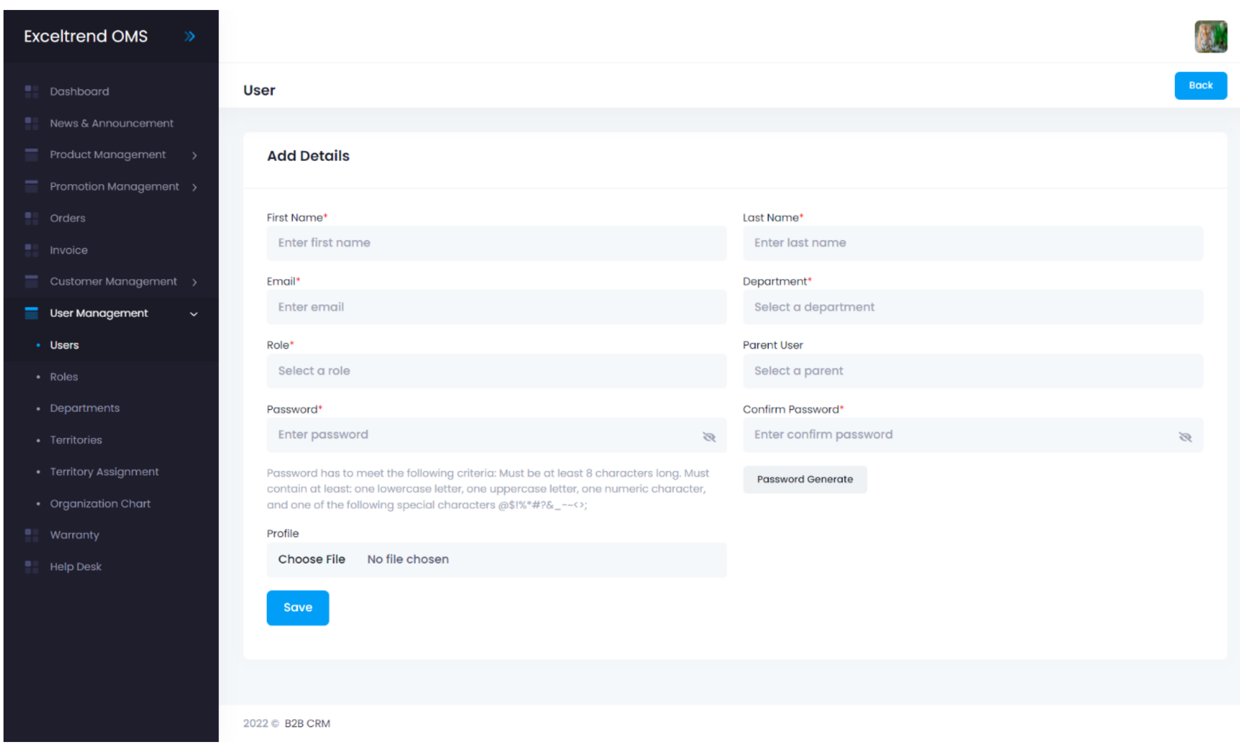
- Admin can create, edit, update and delete the user.
- Admin can filter through filter the data.
- Admin can use the different-different filter and filter the data.
- Only Admin can sync the sales specialist data.
- Video Link: - https://www.screencast.com/t/YVfrbrrv0DC

7.1.1 Steps: - How to create a new user.

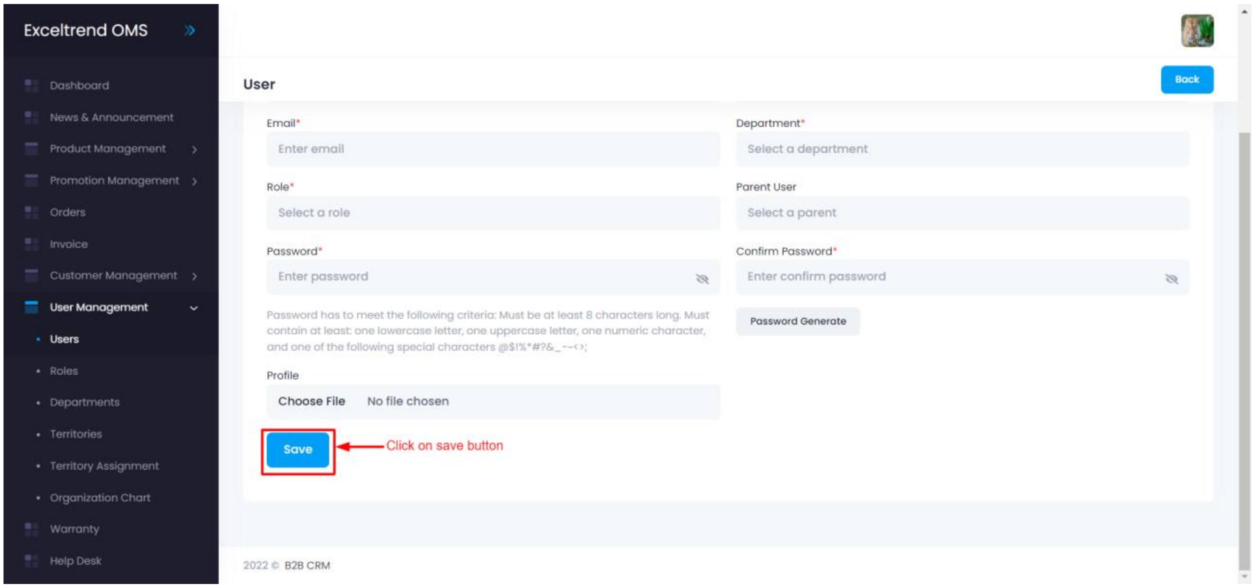
- Steps 1: - Click on create button.



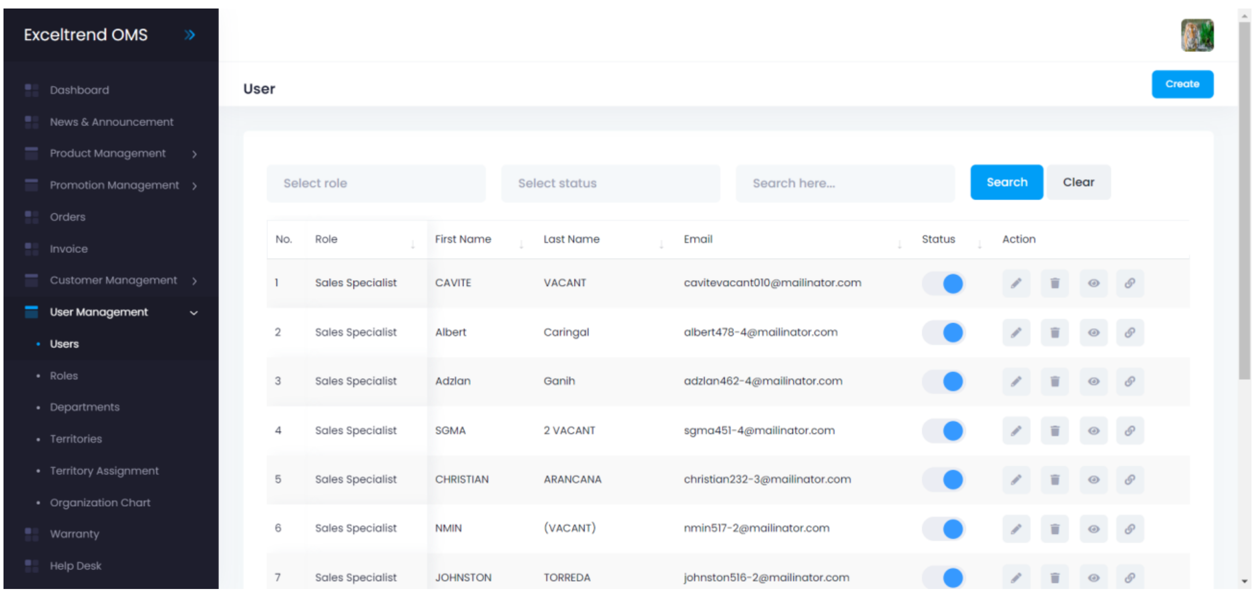
- Steps 2: - Enter the first and last name, enter email address, select the department, select role, select parent user, enter password and confirm password or click on password generate button, and upload the profile image.



- Steps 3: - Click on save button.

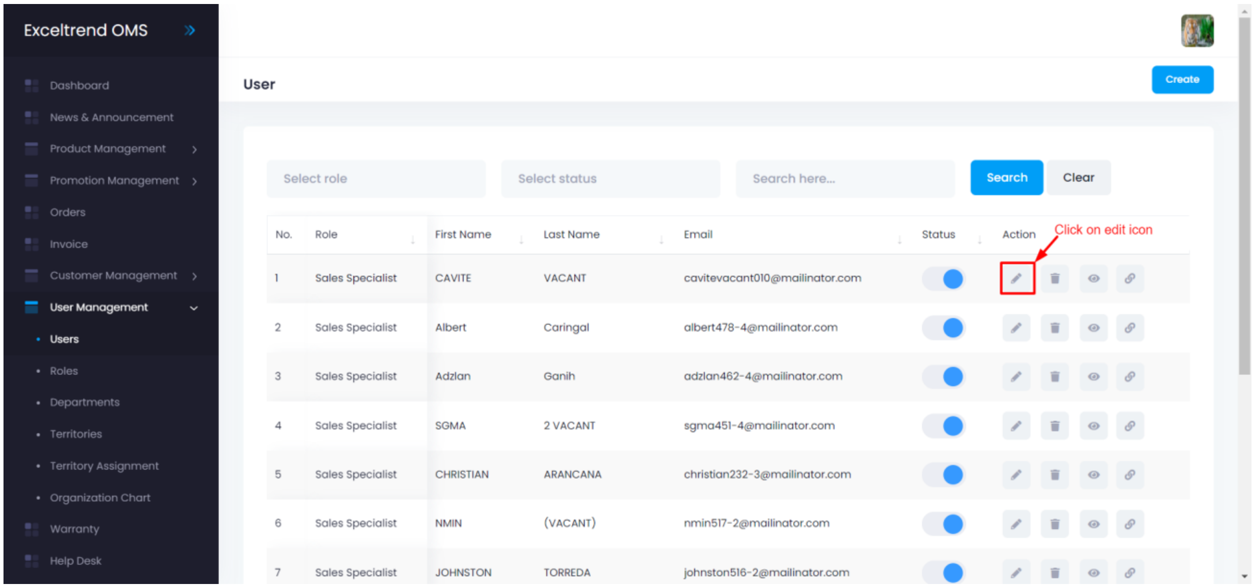


- Steps 4: - Created user show in user listing page.

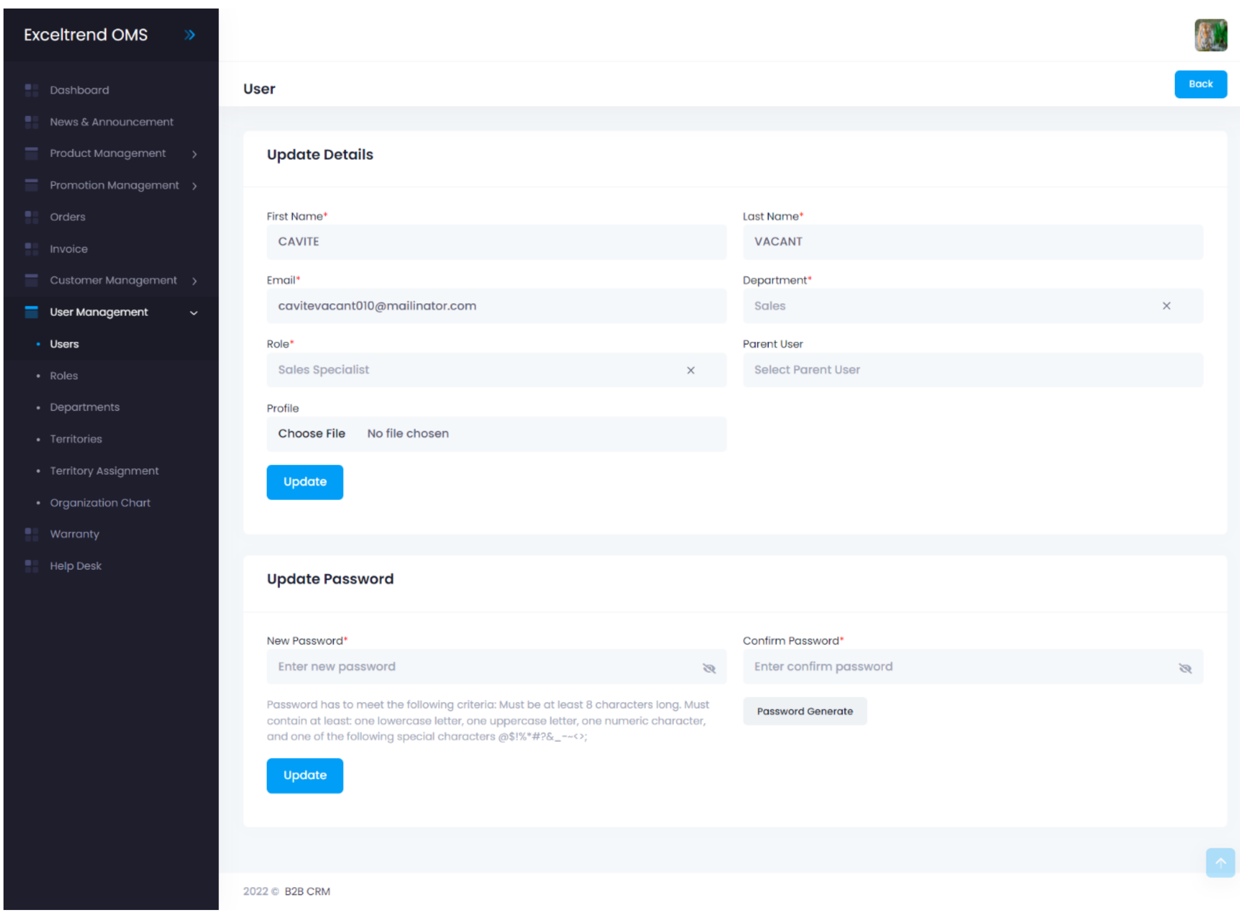


7.1.2 Steps: - How to edit the user.

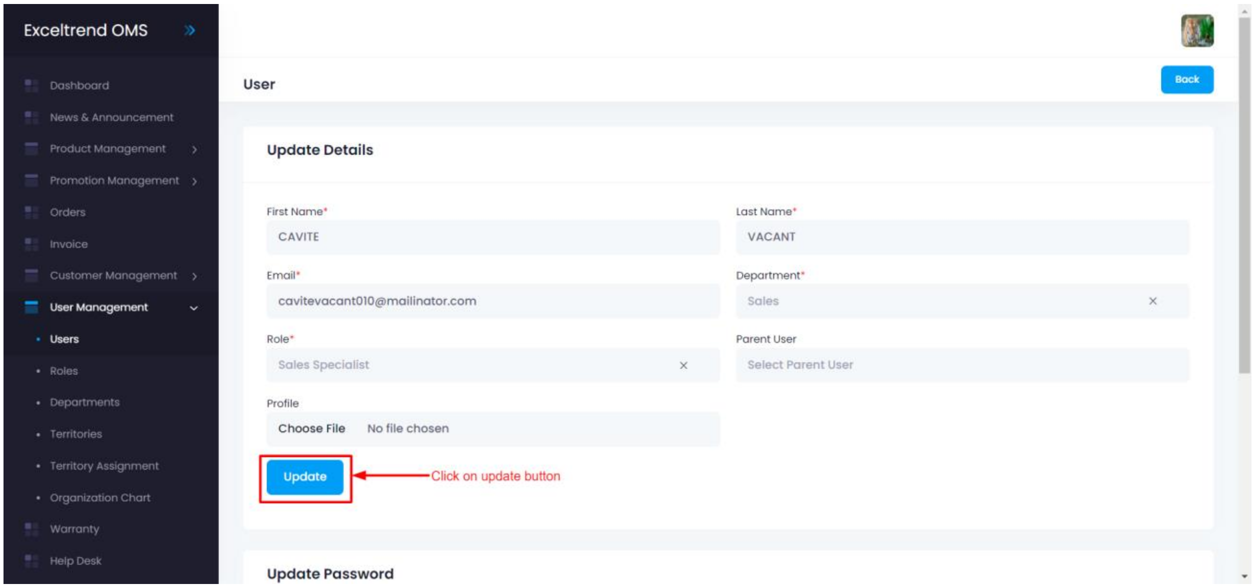
- Steps 1: - Click on edit icon.



- Steps 2: - Update the data.

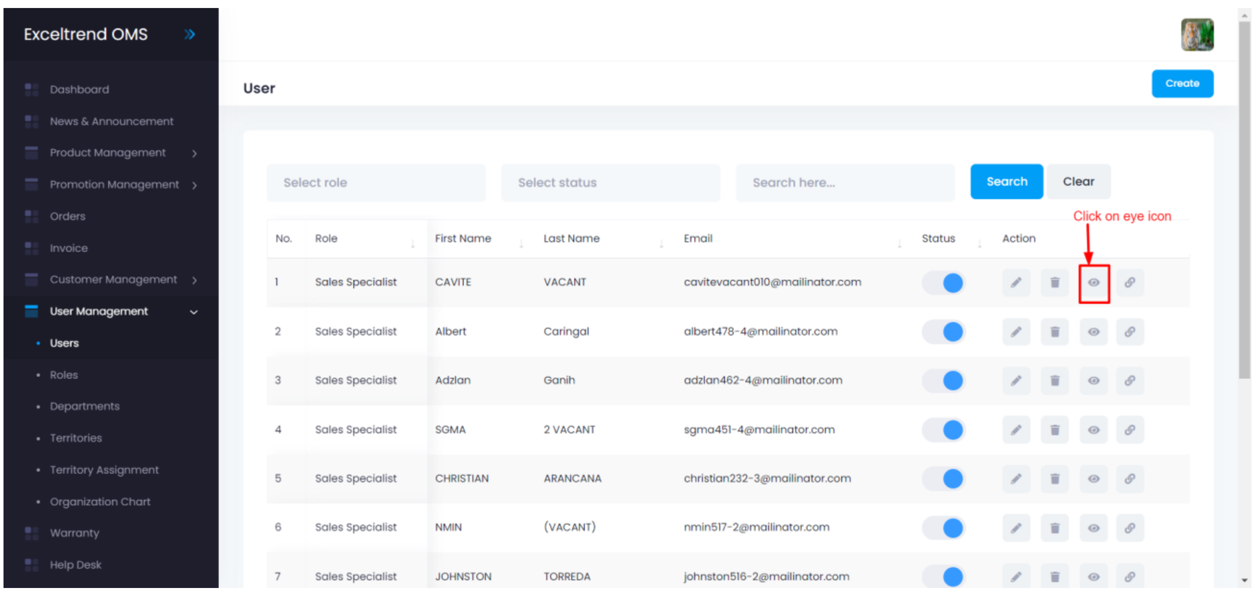


- Steps 3: - Click on update button.

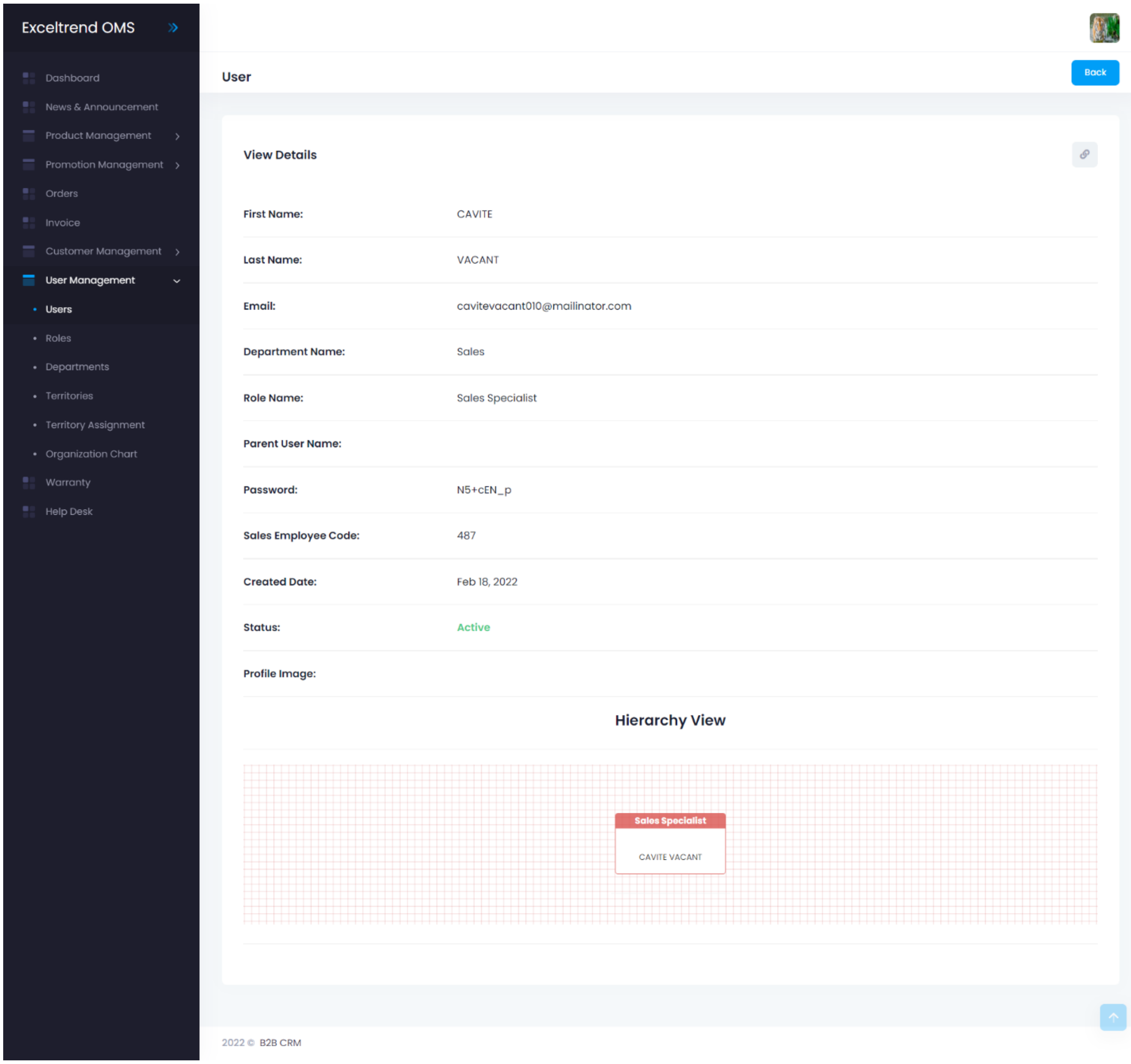


7.1.3 Steps: - How to view the user details.

- Steps 1: - Click on eye icon.

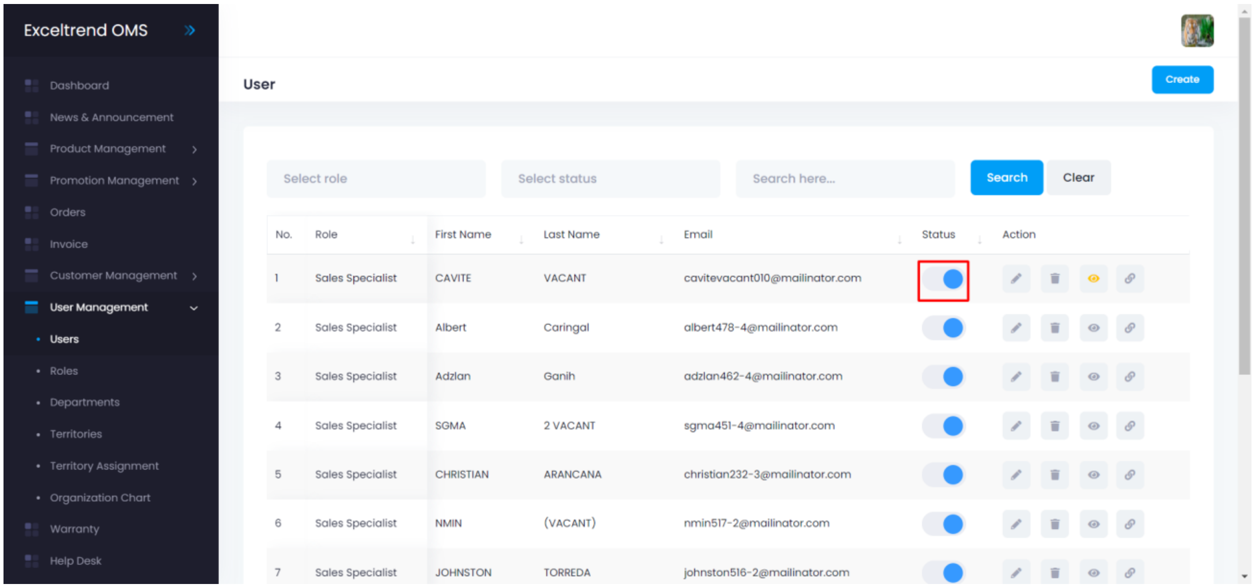


- Steps 2: - All details are display in user view page.

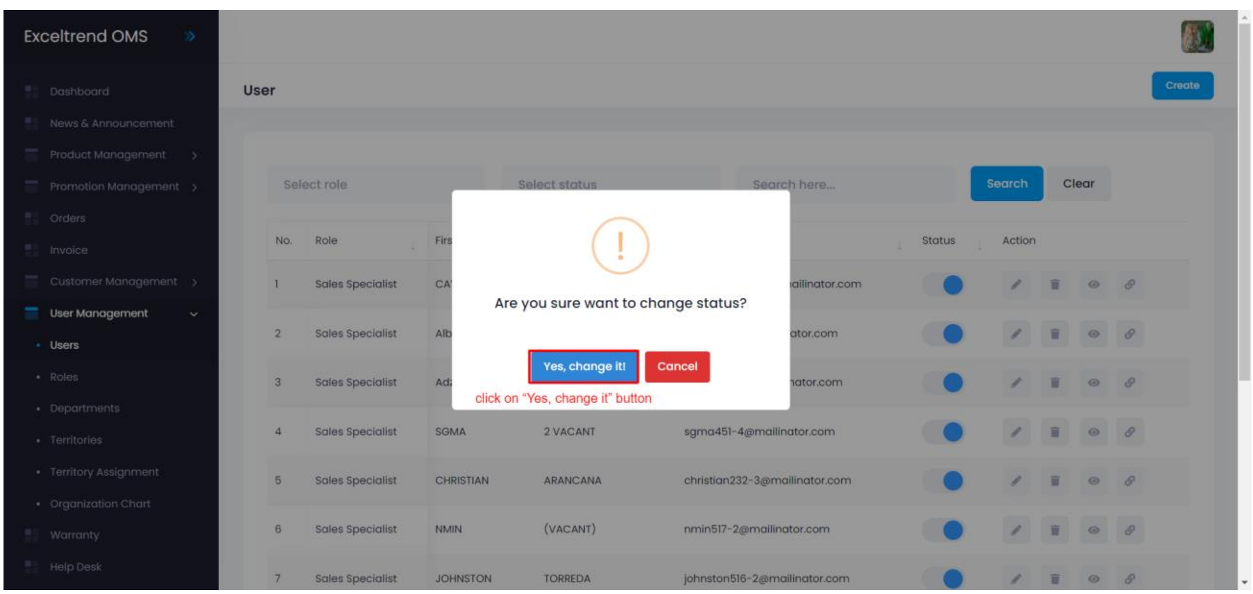


7.1.4 Steps: - How to active and inactive the user.

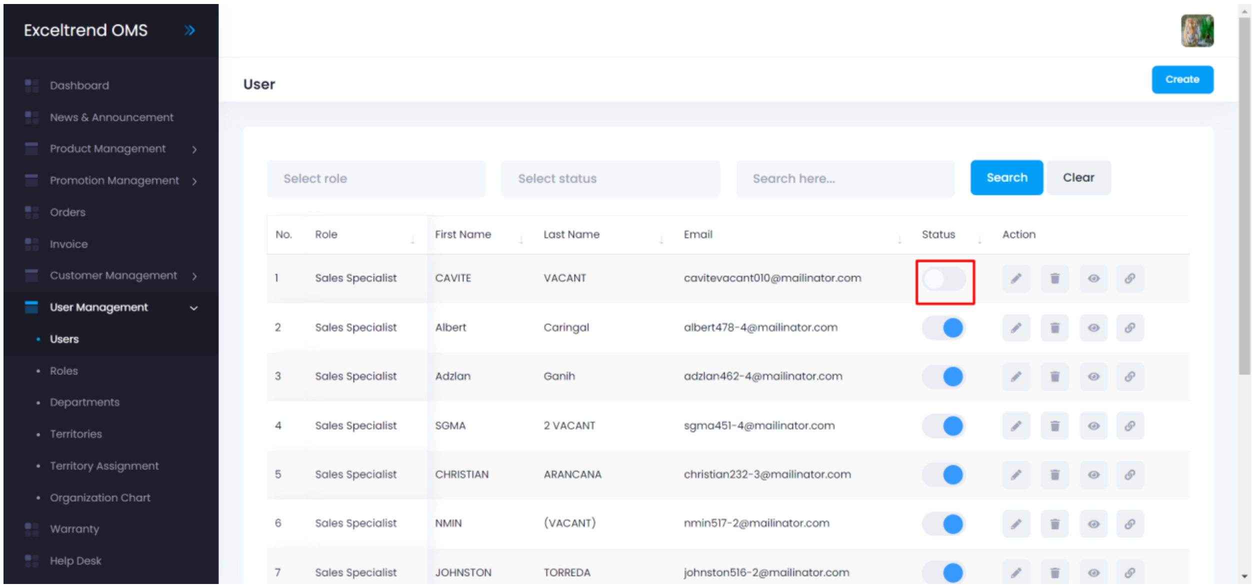
- Steps 1: - Click on Active status and appear to one pop-up model.



- 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.

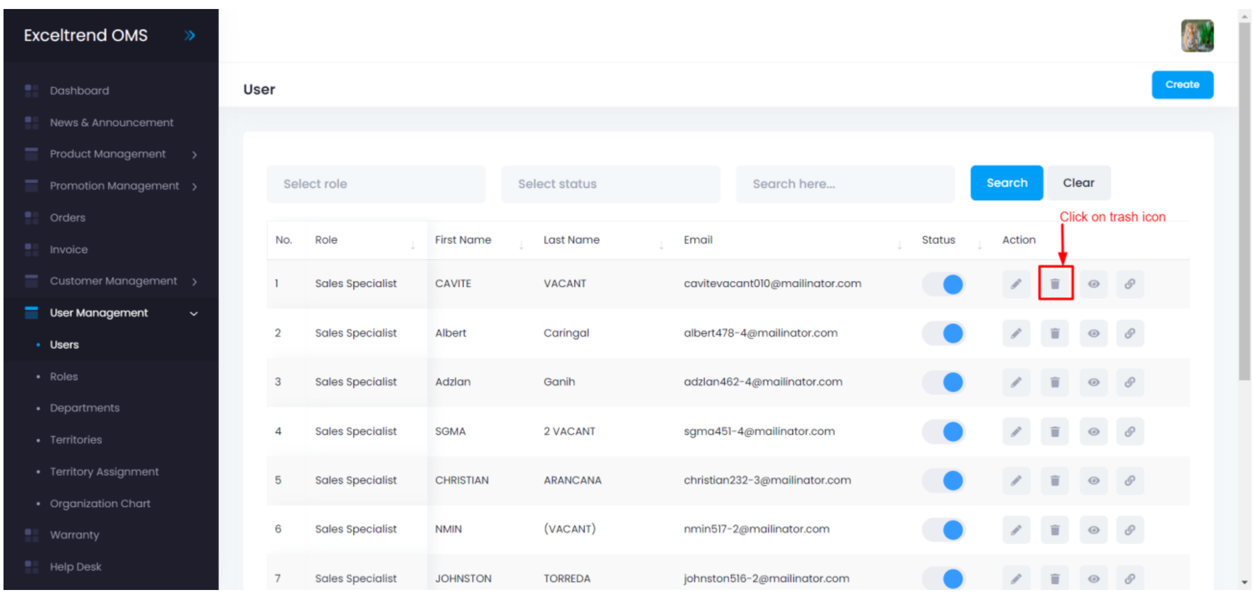


- Steps 3: - Update status show in listing page.

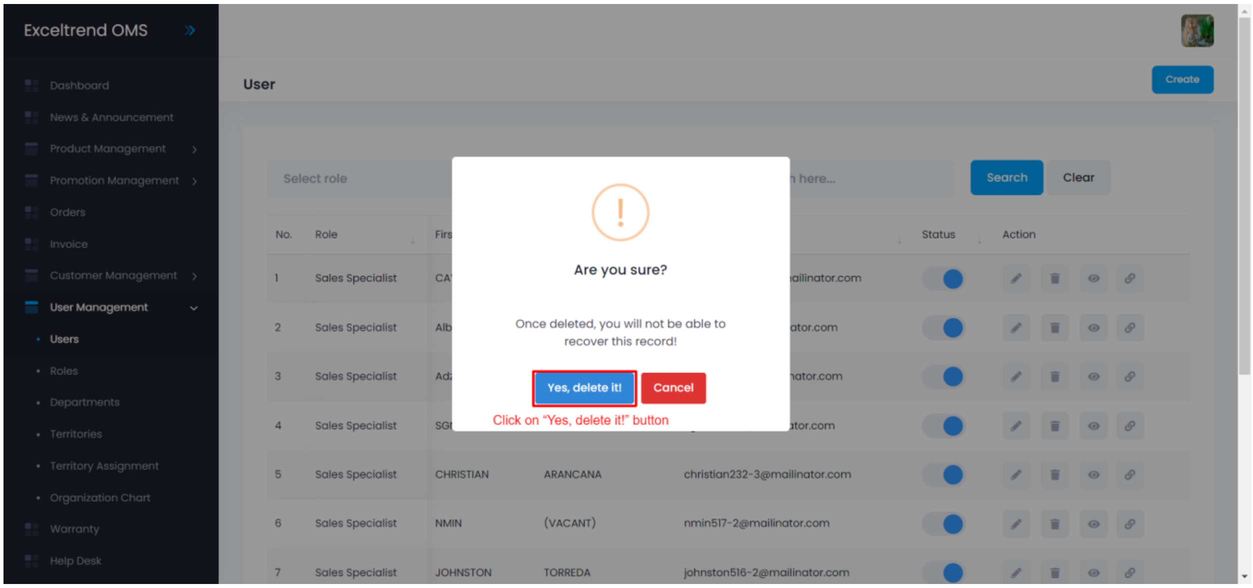


7.1.5 Steps: - How to delete the user.

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

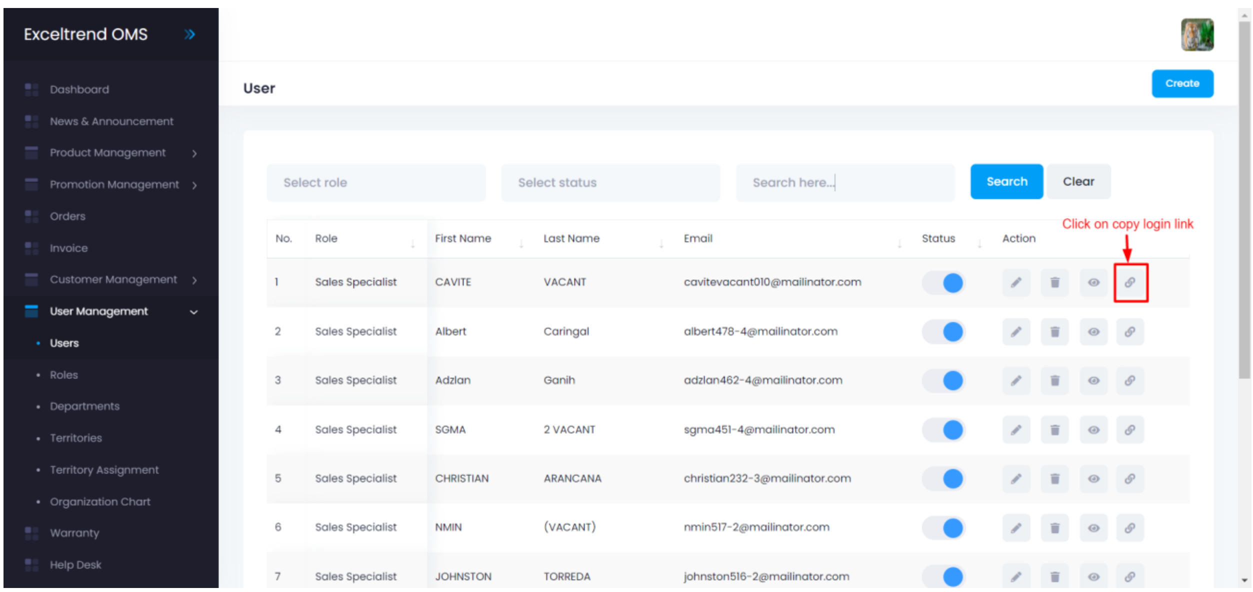


- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.

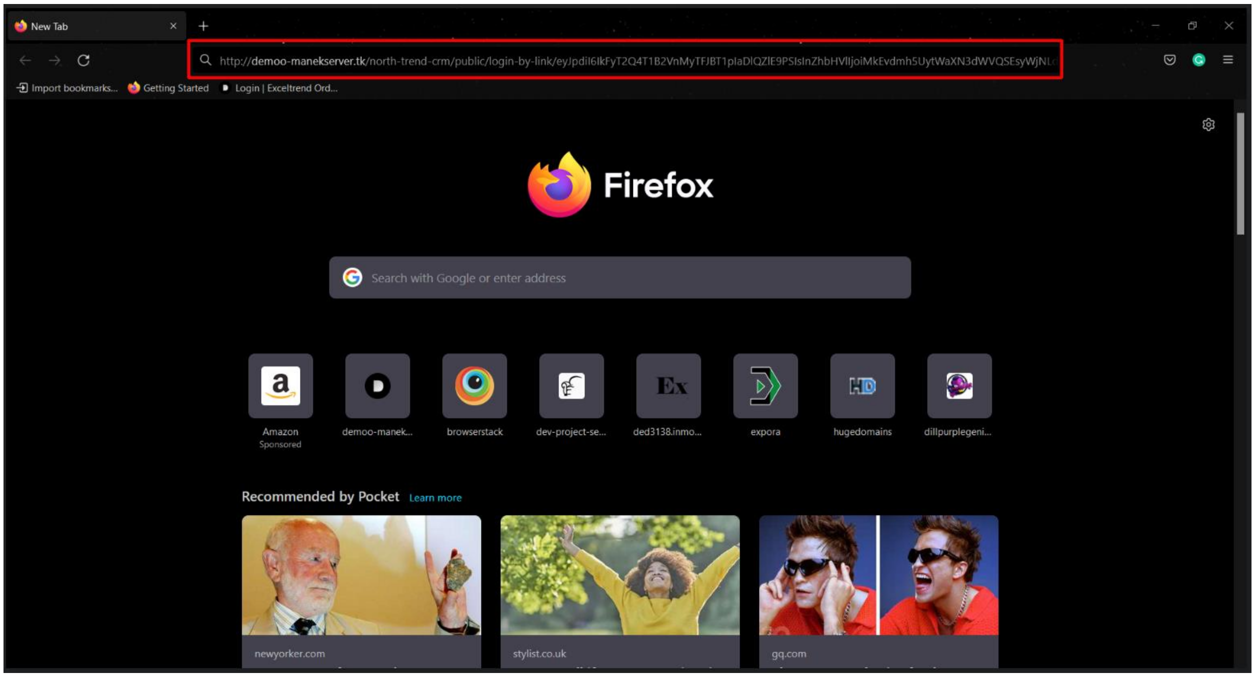


7.1.6 Steps: - How to direct login for particular user.

- Steps 1: - Click on copy login link.



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

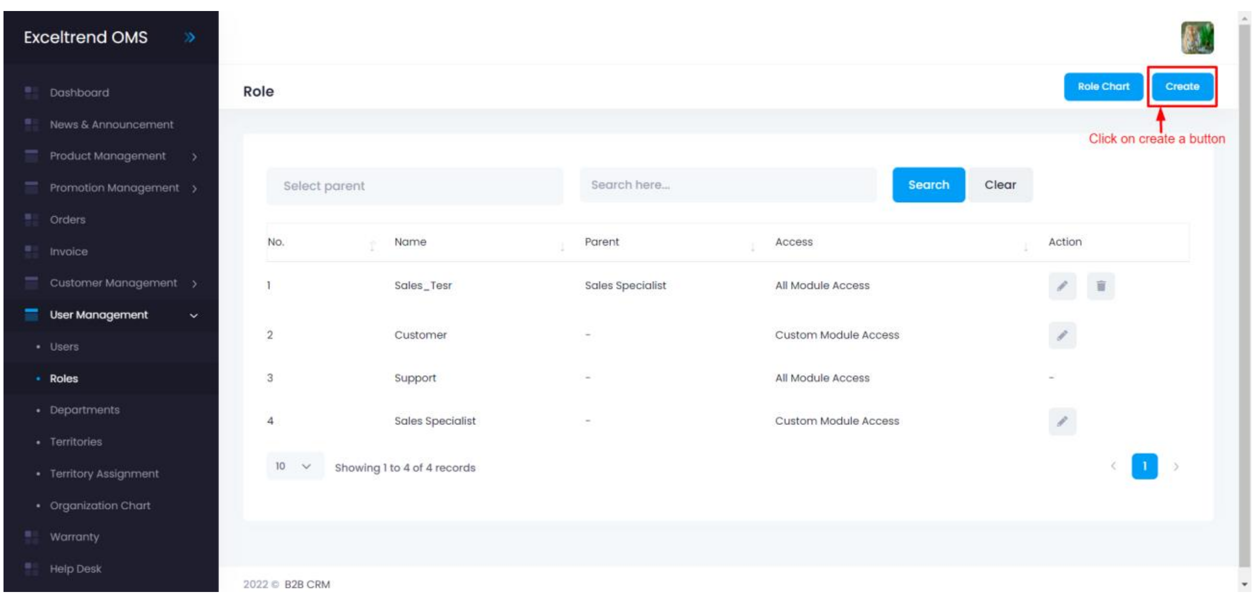


7.2 Roles: -

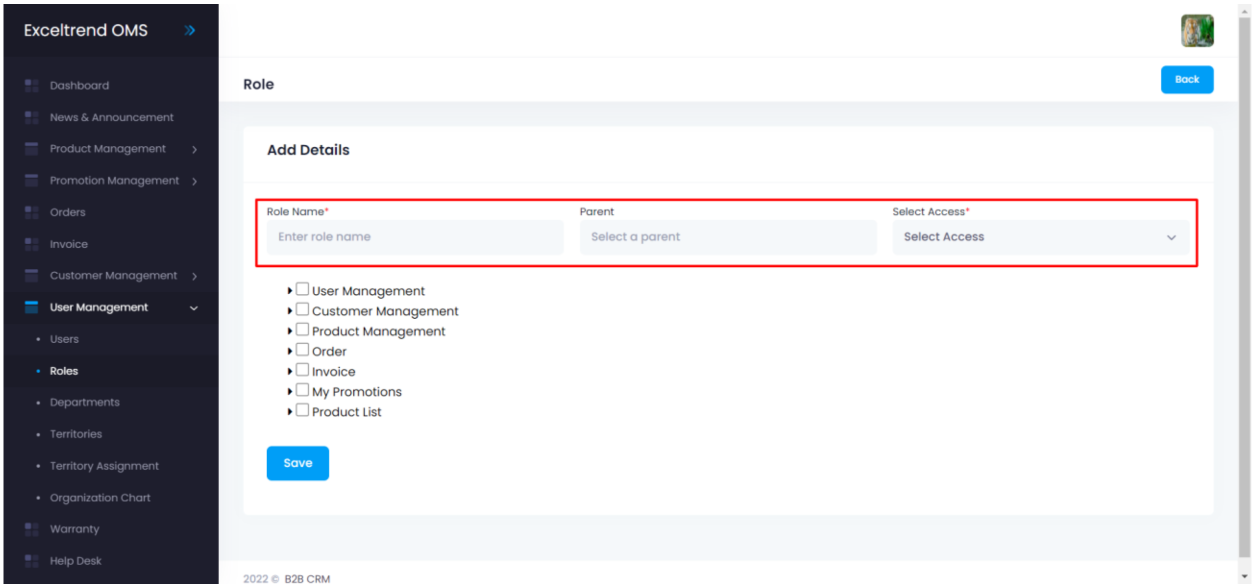
- Admin can create, edit, and update the role.
- Admin can search the data using the search box.
- Admin can use the different-different filter and filter the data.
- Video Link: - https://www.screencast.com/t/twjioH5t

7.2.1 Steps: - How to create a new role.

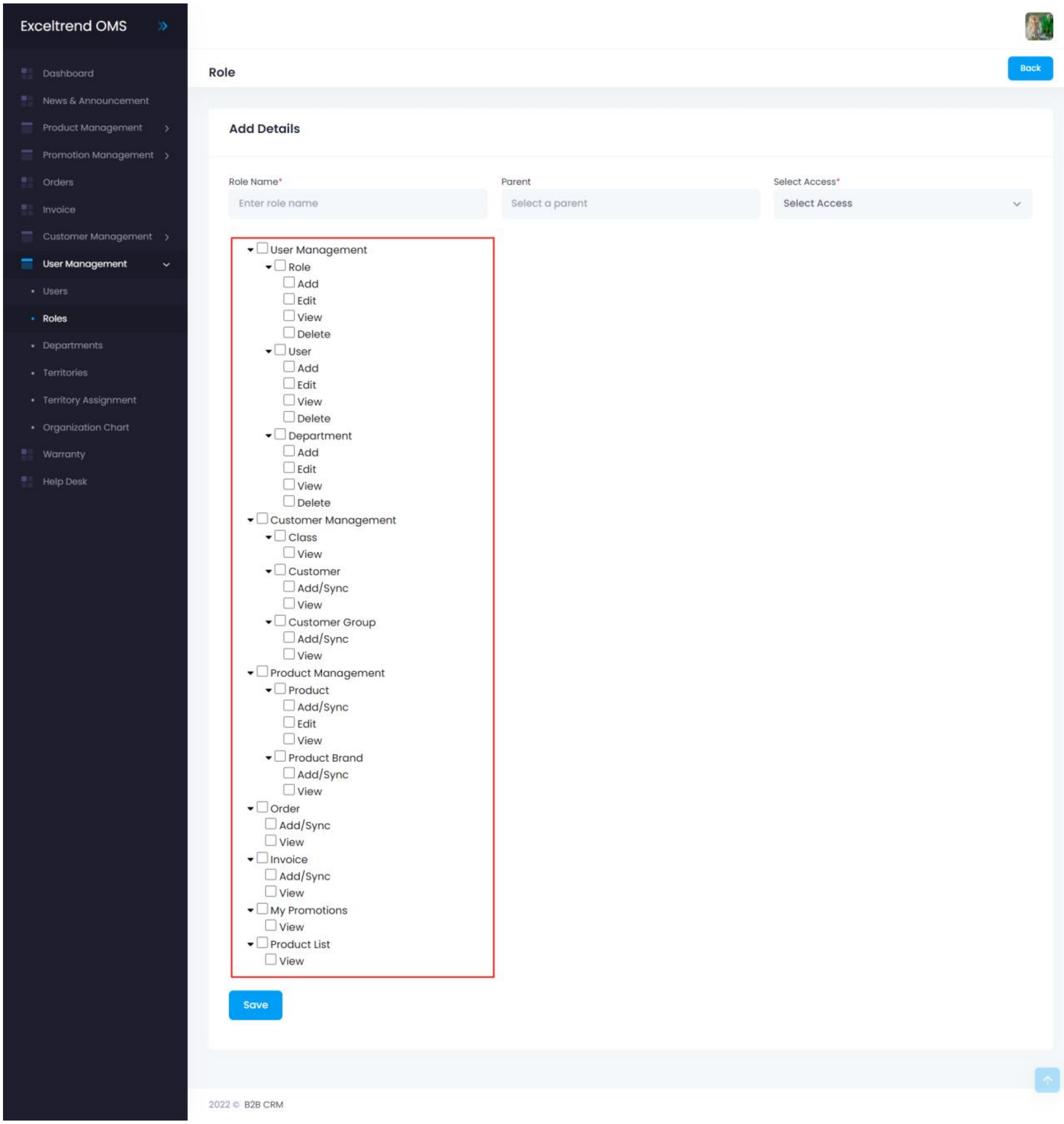
- Steps 1: - Click on create a button.



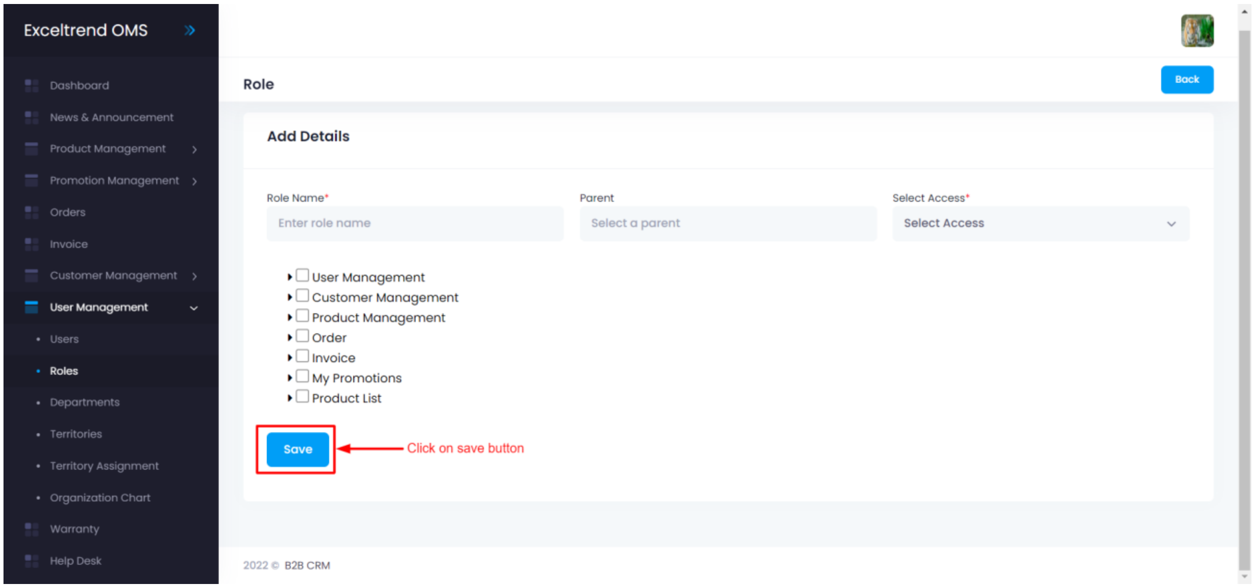
- Steps 2: - Enter the Role name, select the parent role, and select access type.



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

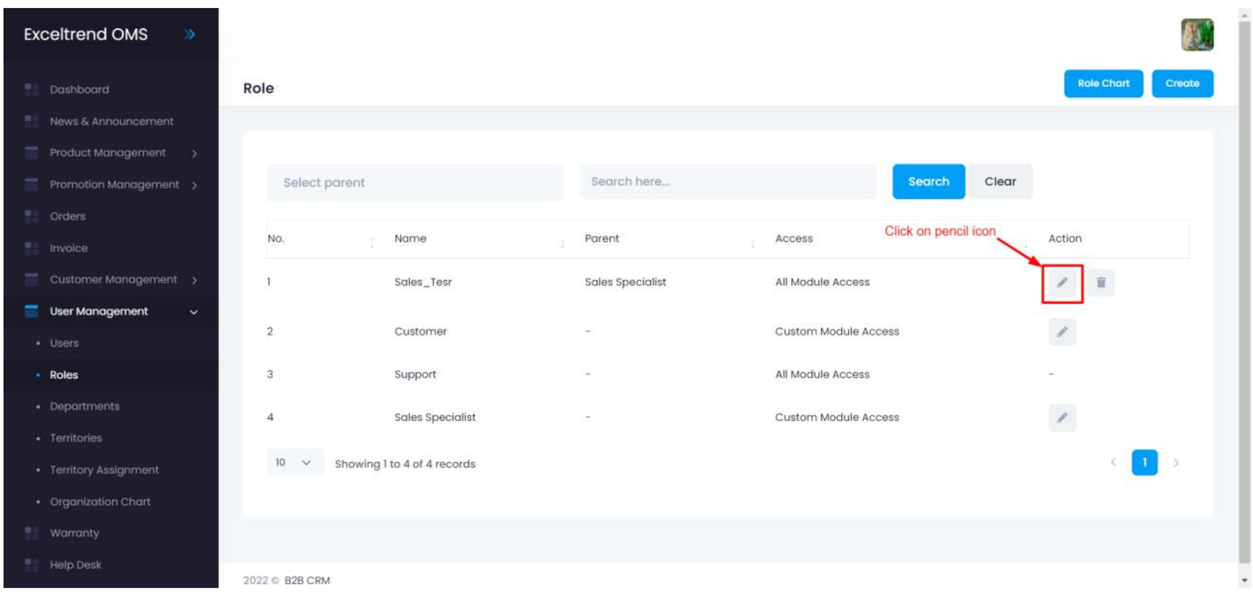


- Steps 4: - Click on save button.

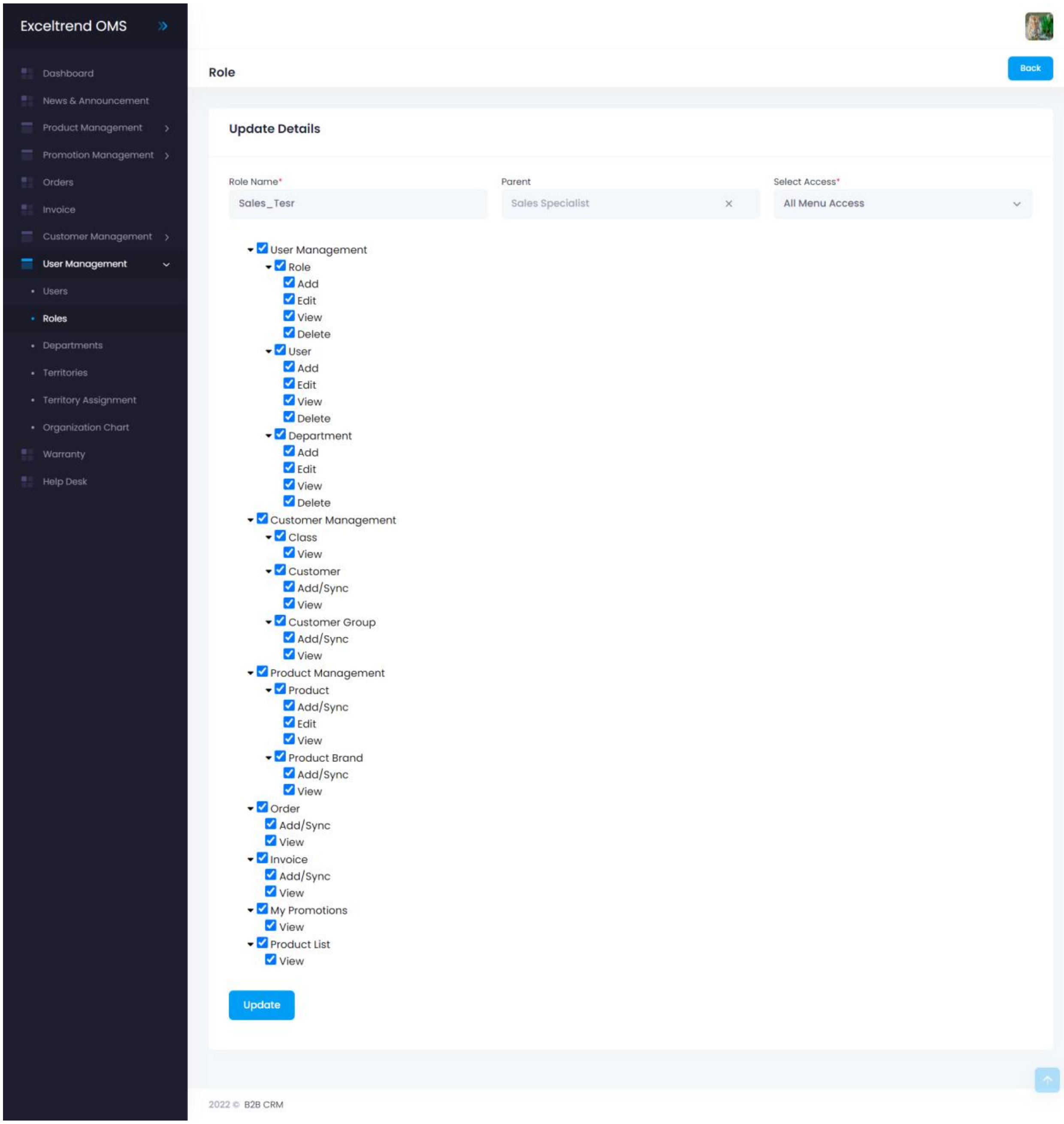


7.2.2 Steps: - How edit the role.

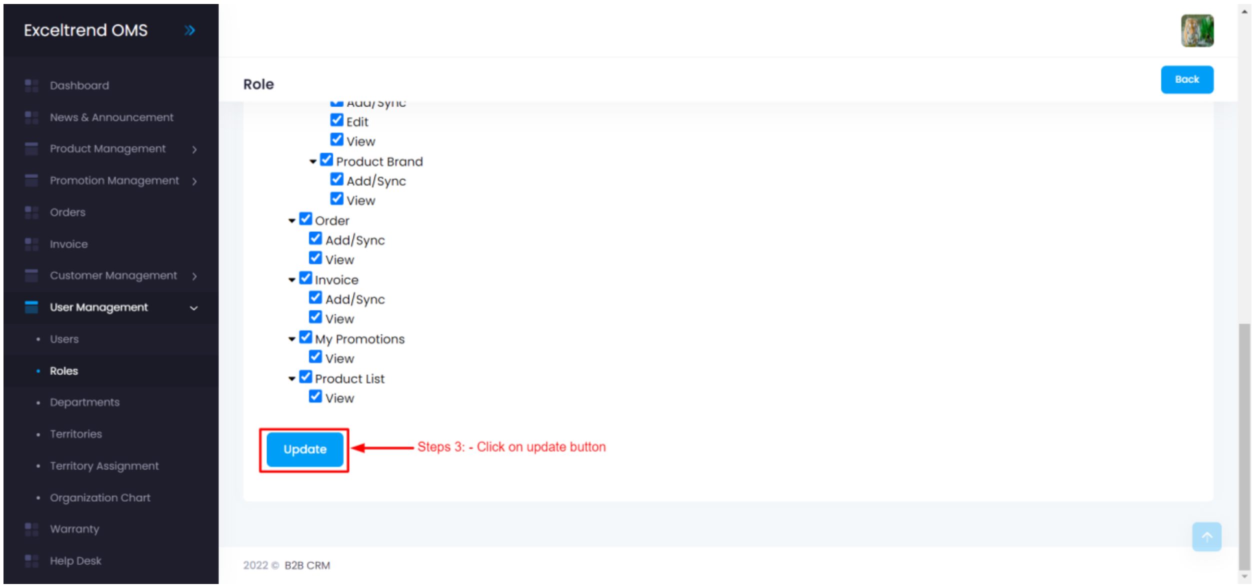
- Steps 1: - Click on pencil icon.



- Steps 2: - Update the data.

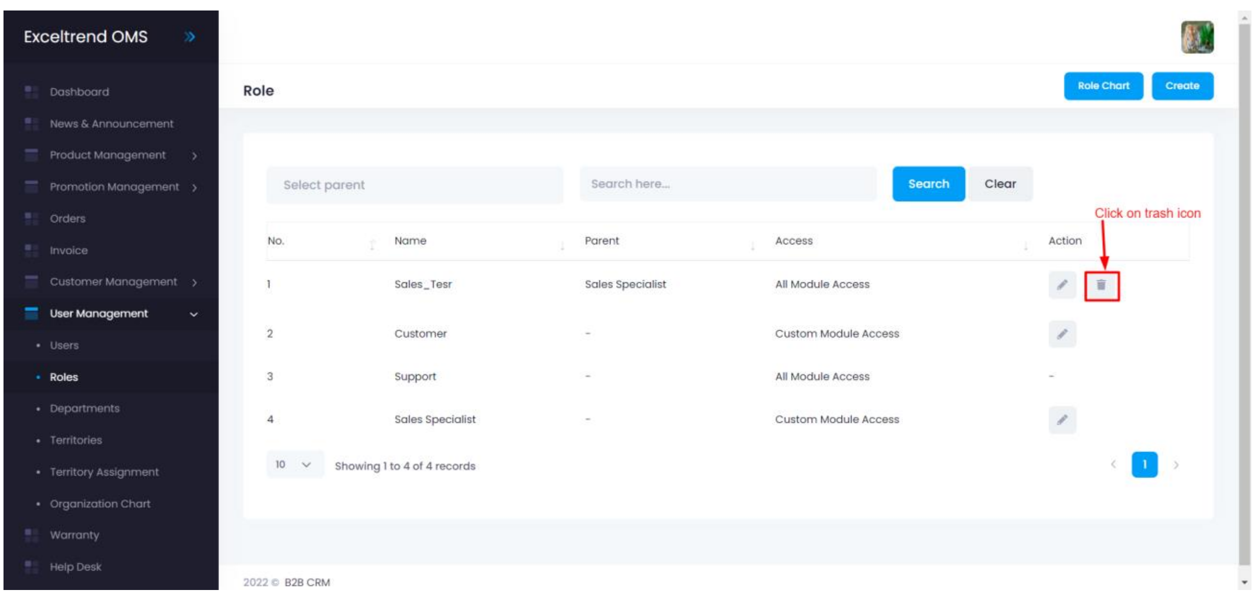


- Steps 3: - Click on update button.

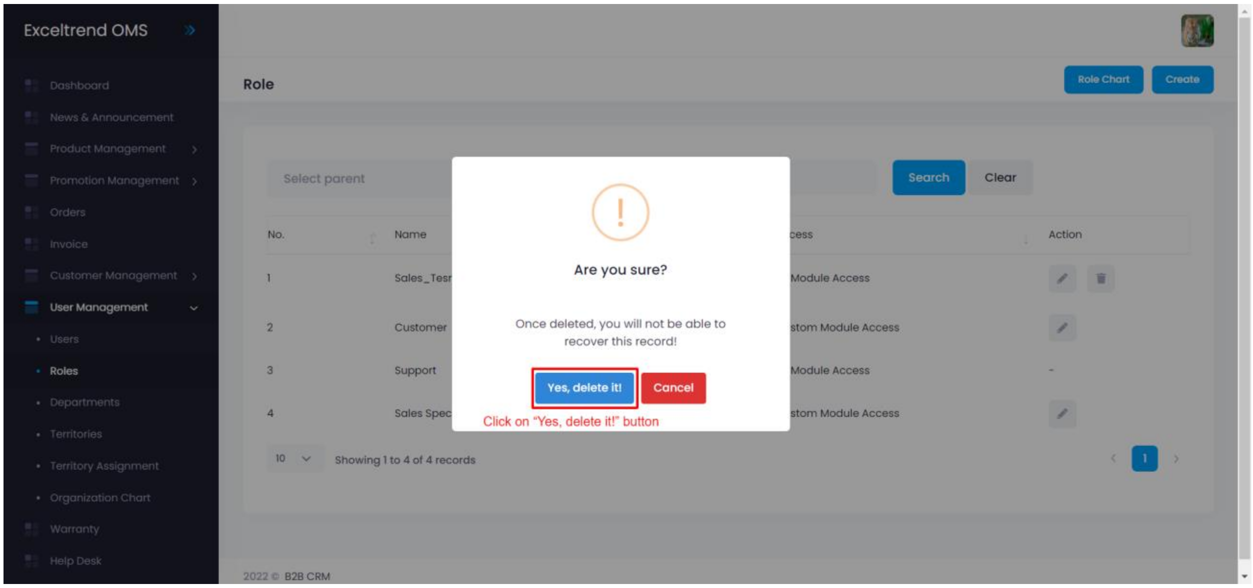


7.2.3 Steps: - How to delete the role.

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



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

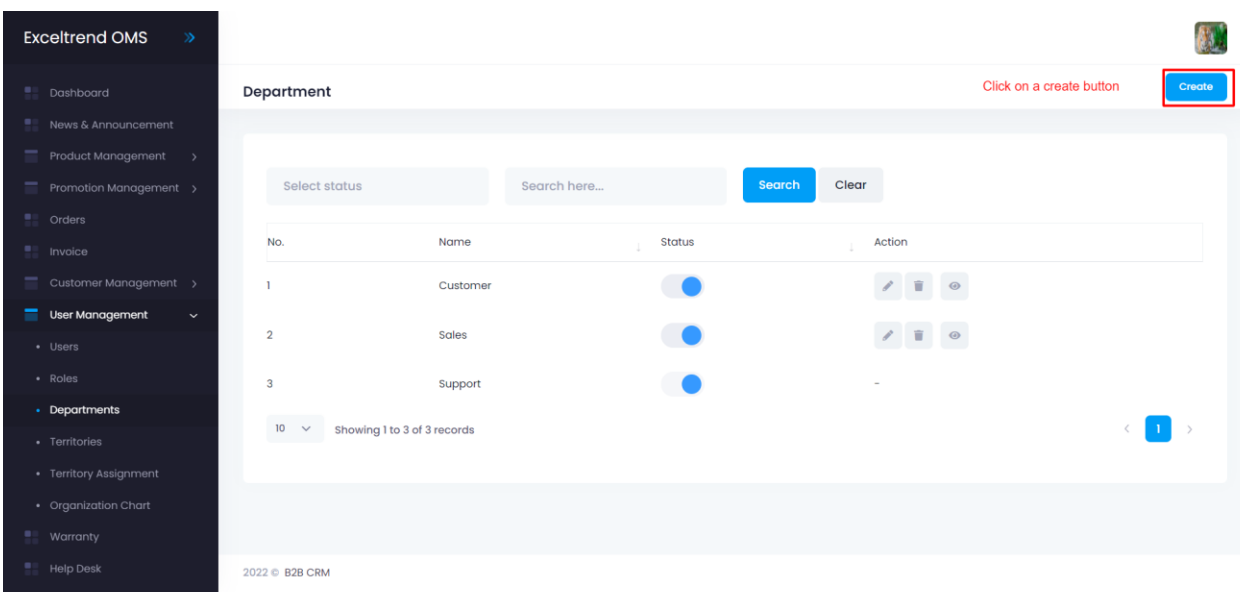


7.3 Departments: -

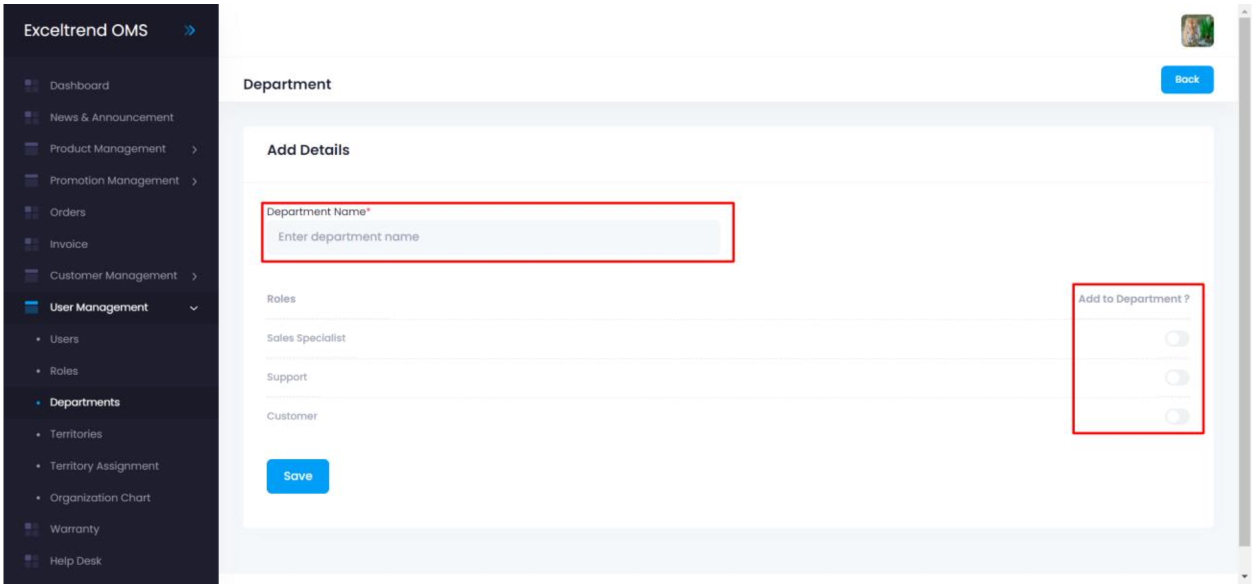
- Admin can create, edit, update, view and delete the departments.
- Admin can search the data using the search box.
- Admin can use the different-different filter and filter the data.
- Video Link: - https://www.screencast.com/t/ubRHUjFTH78

7.3.1 Steps: - How to create a new department.

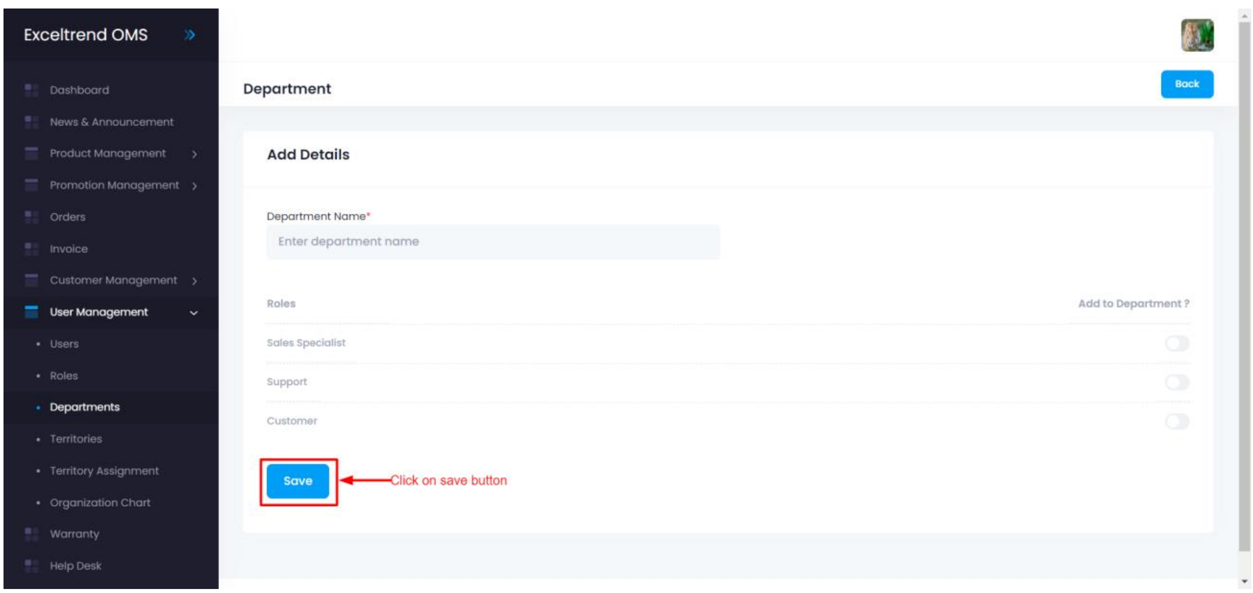
- Steps 1: - Click on a create button.



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

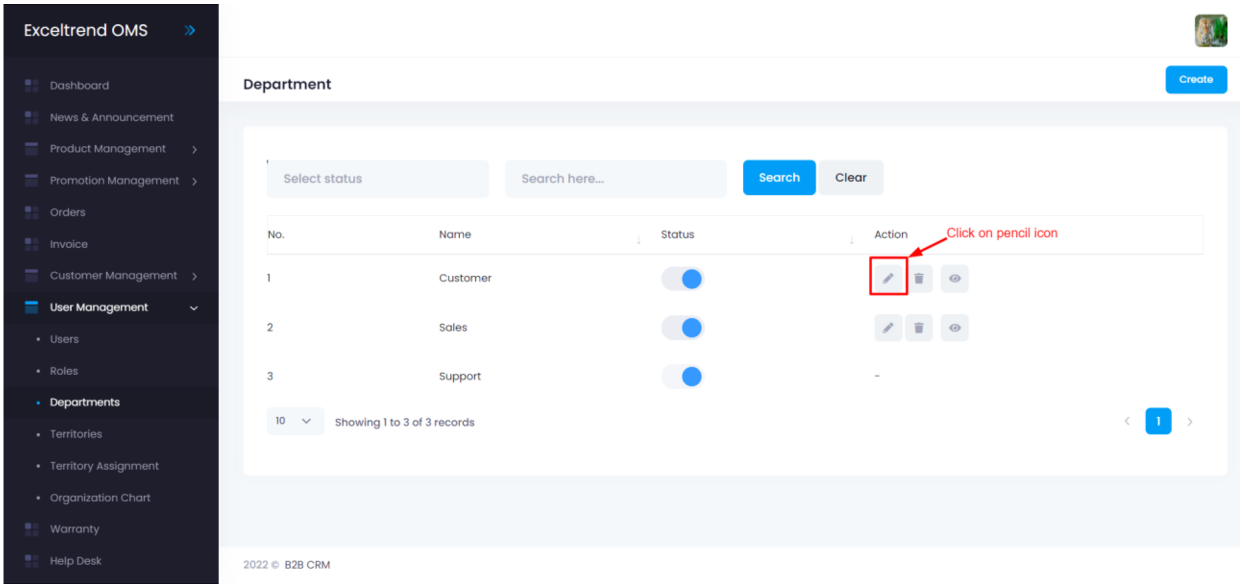


- Steps 3: - Click on save button.

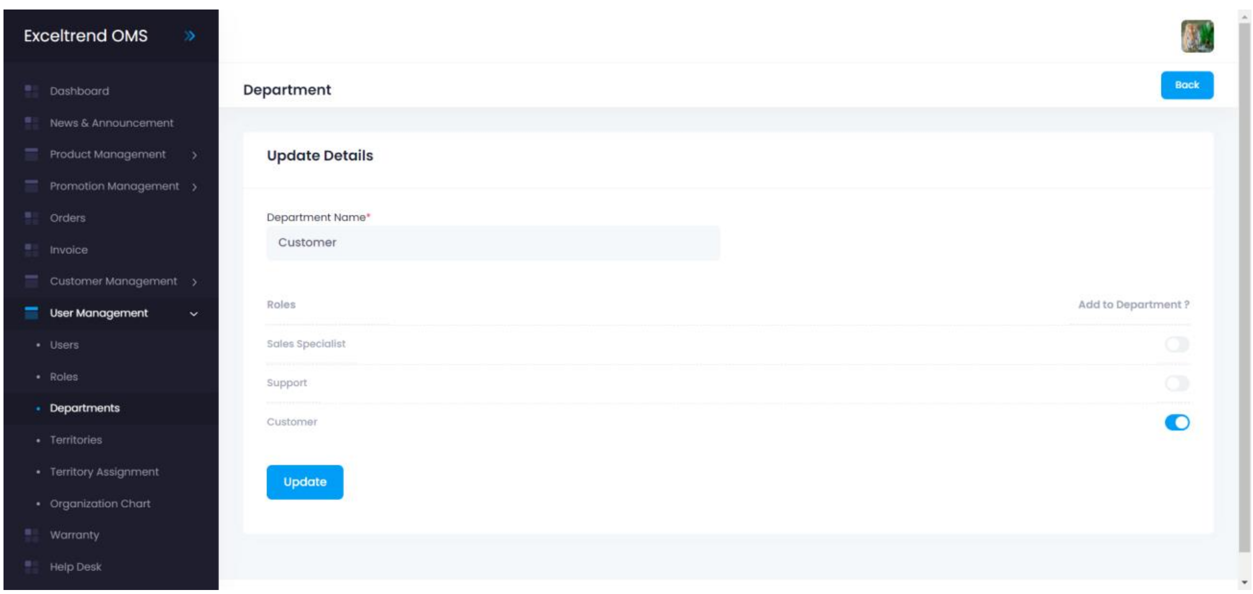


7.3.2 Steps: - How to edit the department.

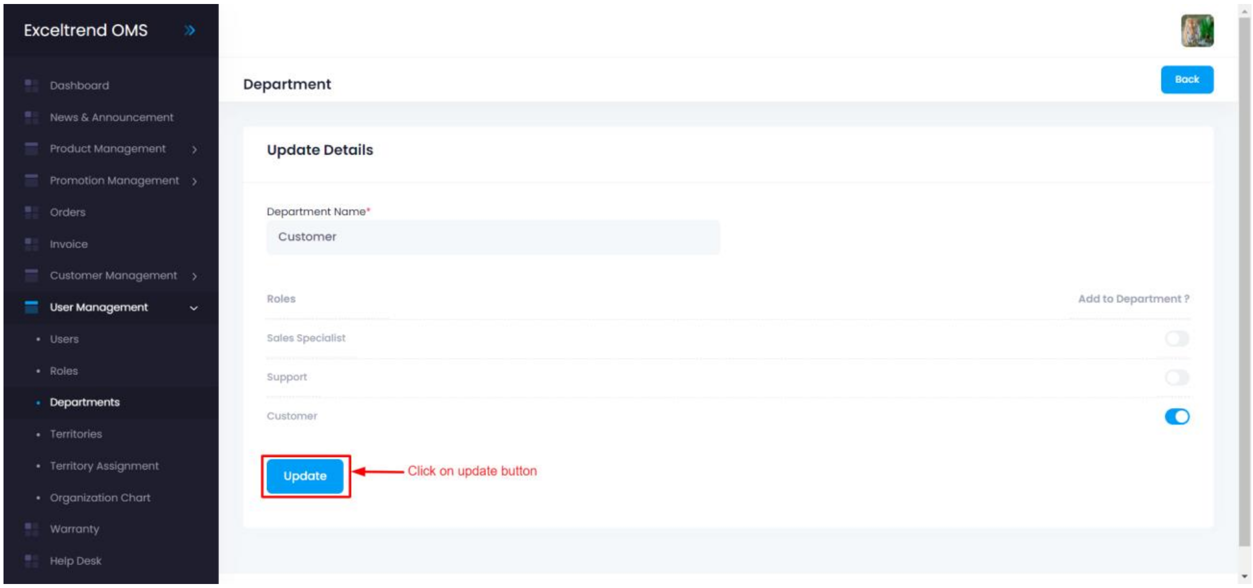
- Steps 1: - Click on pencil icon.



- Steps 2: - Update the data.

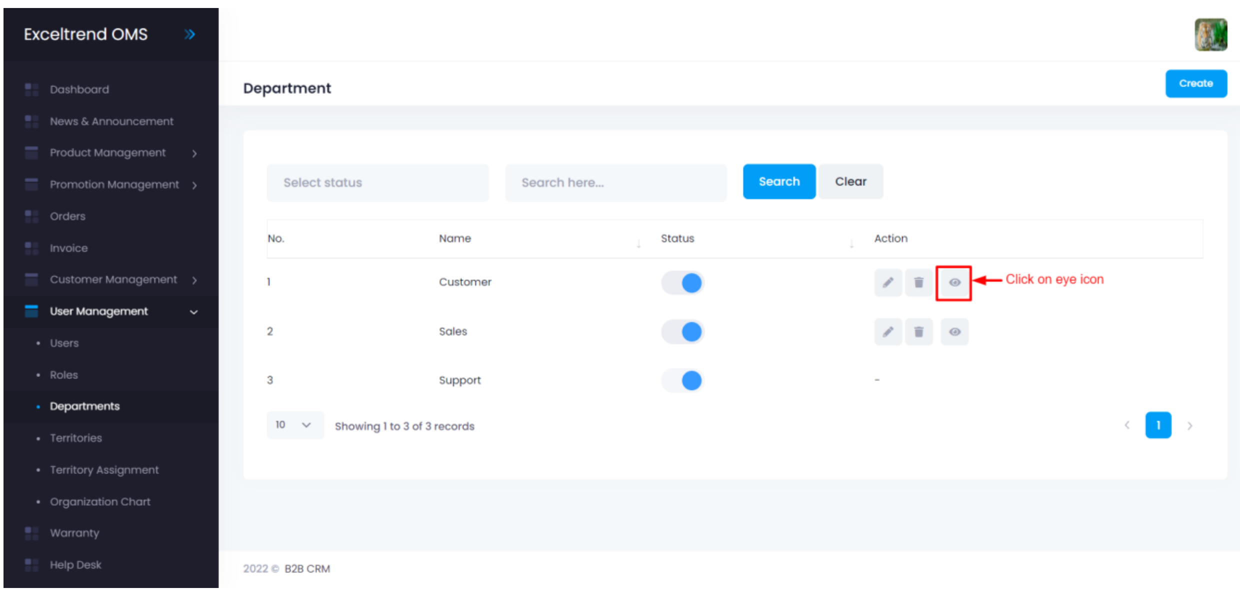


- Steps 3: - Click on update button.

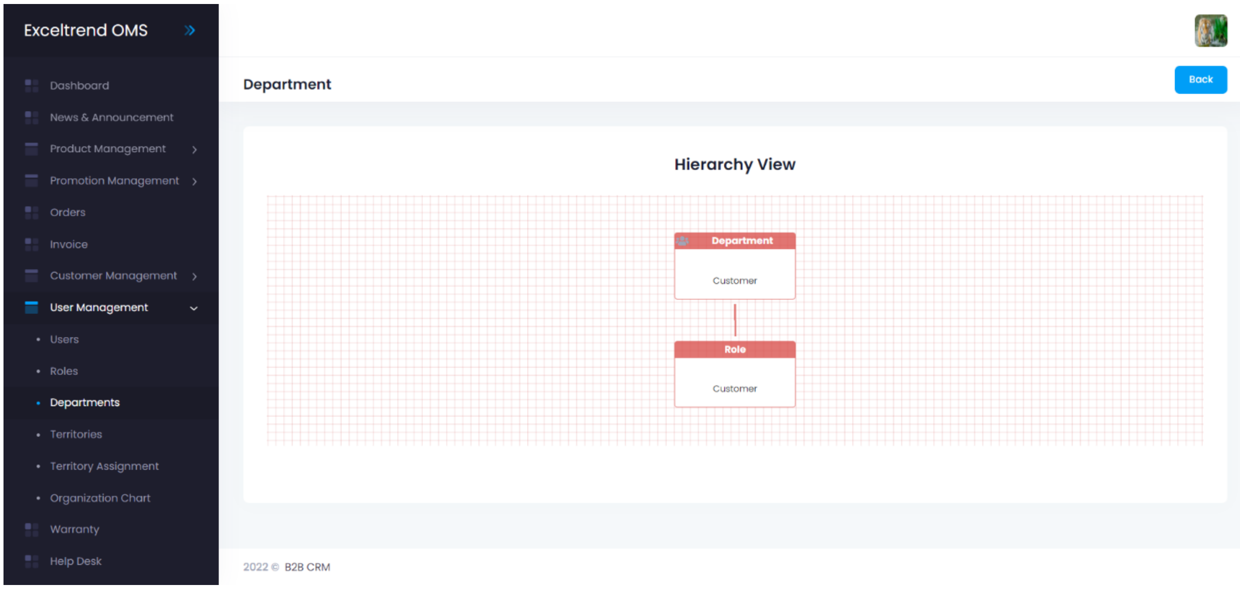


7.3.3 Steps: - How to view the department.

- Steps 1: - Click on eye icon.

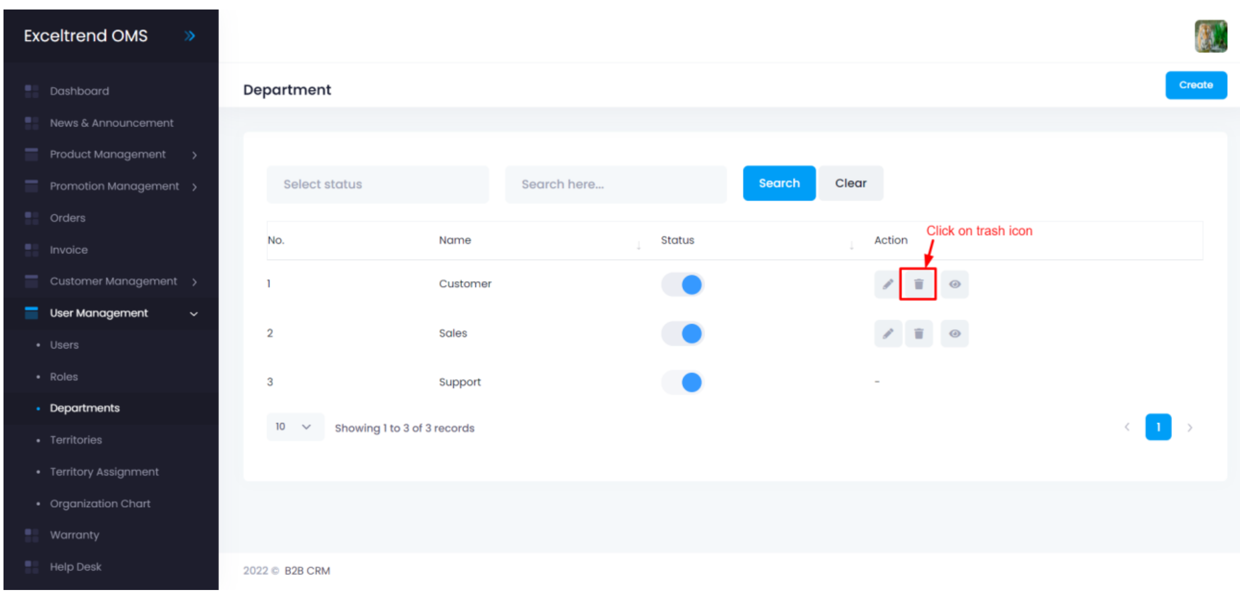


- Steps 2: - All details show in view page.

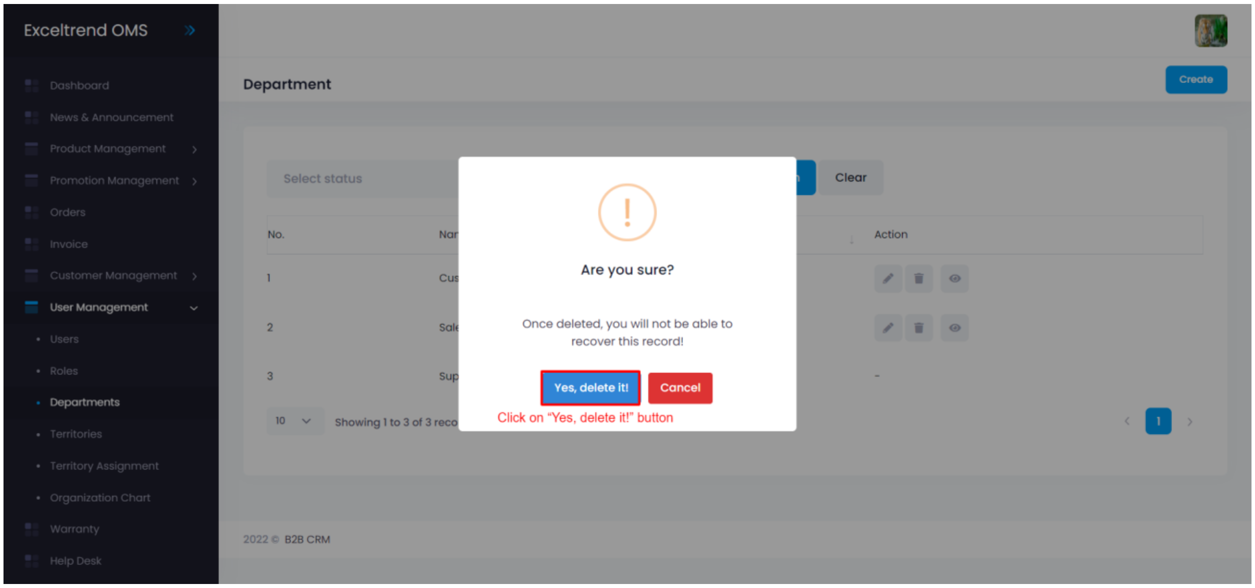


7.3.4 Steps: - How to delete the department.

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

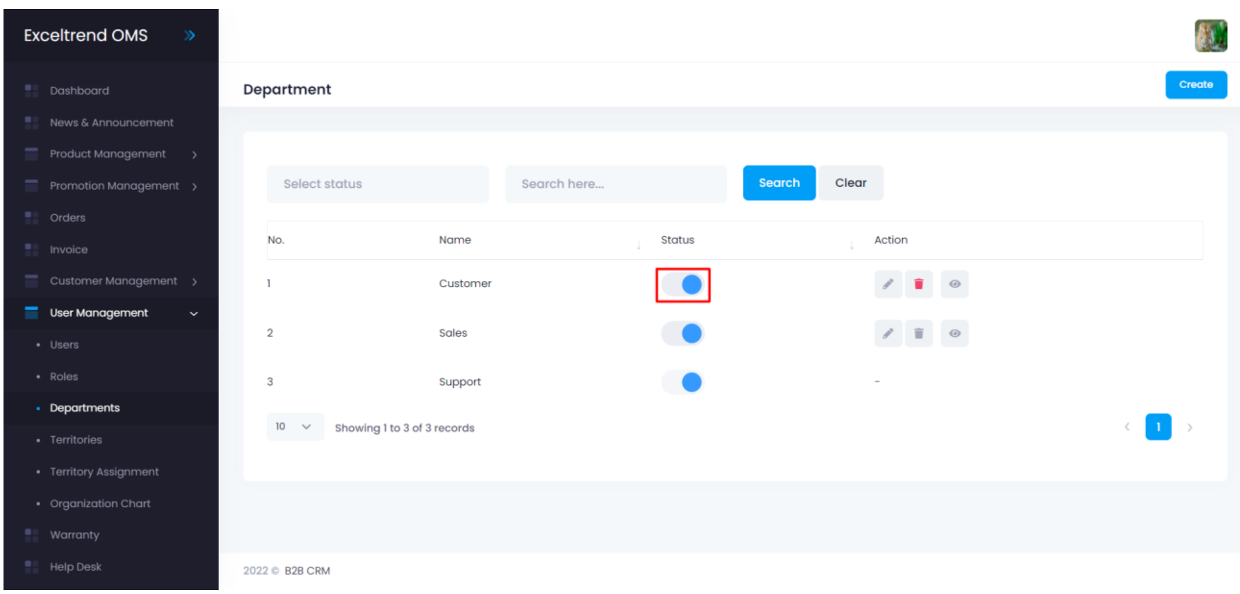


- Steps 2: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.

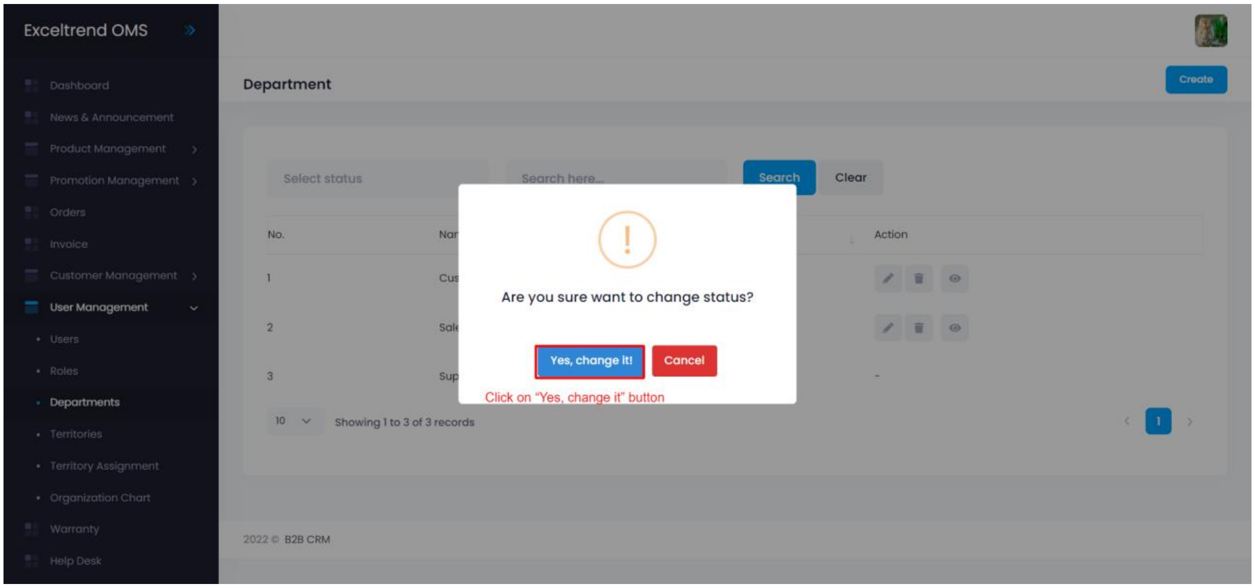


7.3.5 Steps: - How active and inactive the department.

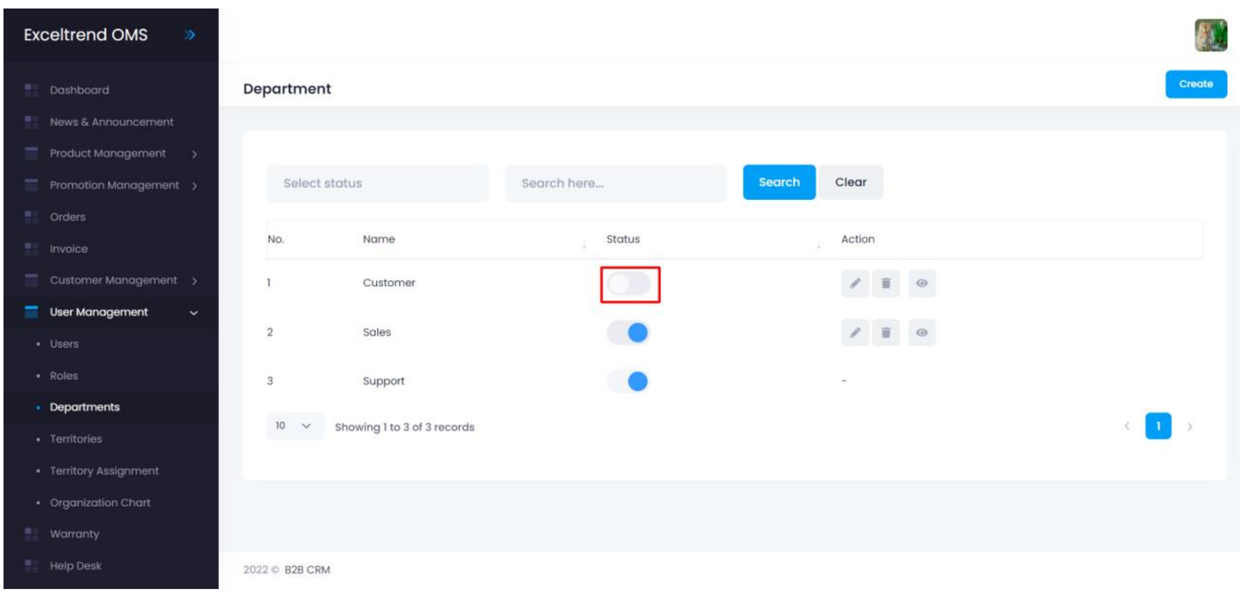
- Steps 1: - Click on Active status and appear to one pop-up model.



- 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.

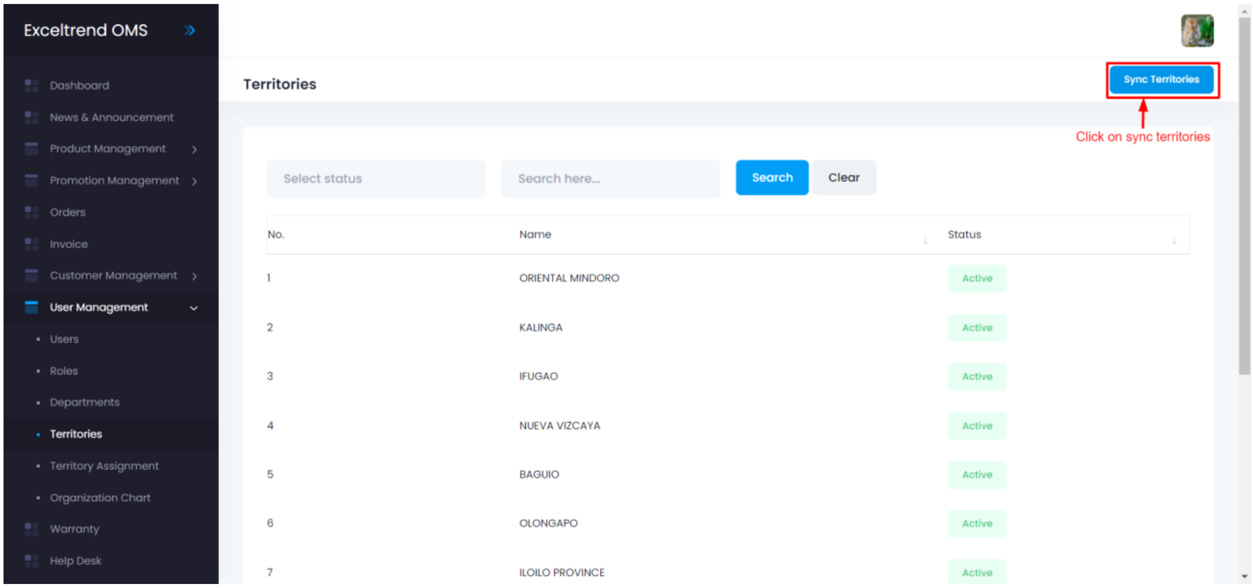


7.4 Territories: -

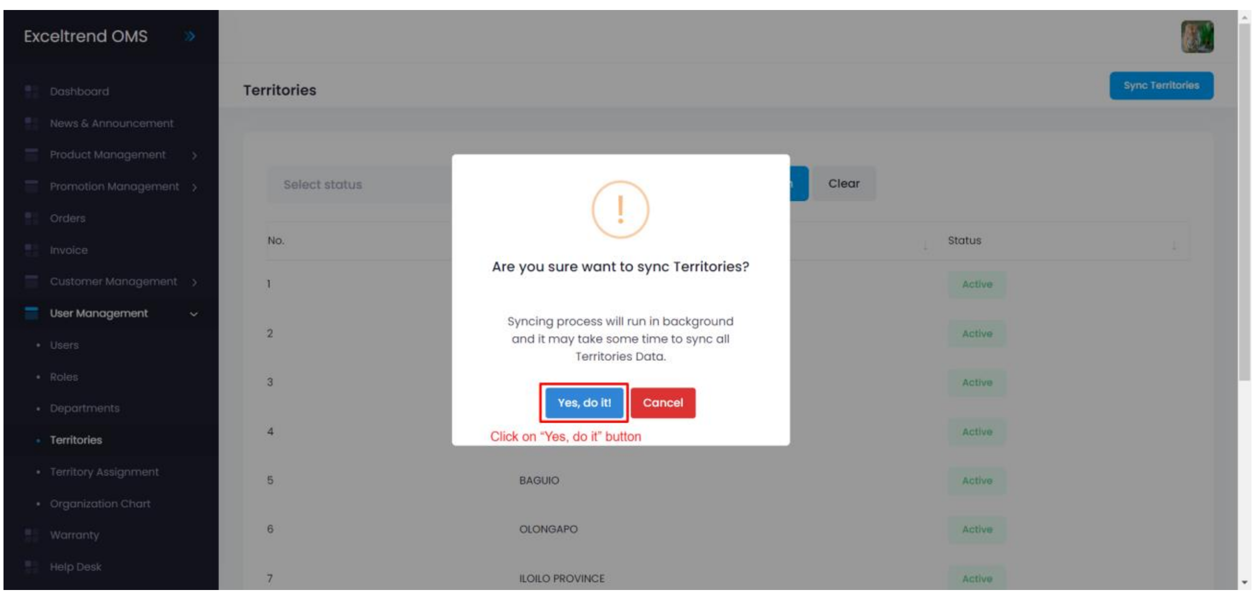
- Admin can sync the territories.
- Admin can search the territories using the search box.
- Admin can use the different-different filter and filter the data.
- Video Link: - https://www.screencast.com/t/ipYCD2lTQd2

7.4.1 Steps: - How sync the territories.

- Steps 1: - Click on sync territories and appear pop-up model.



- 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.

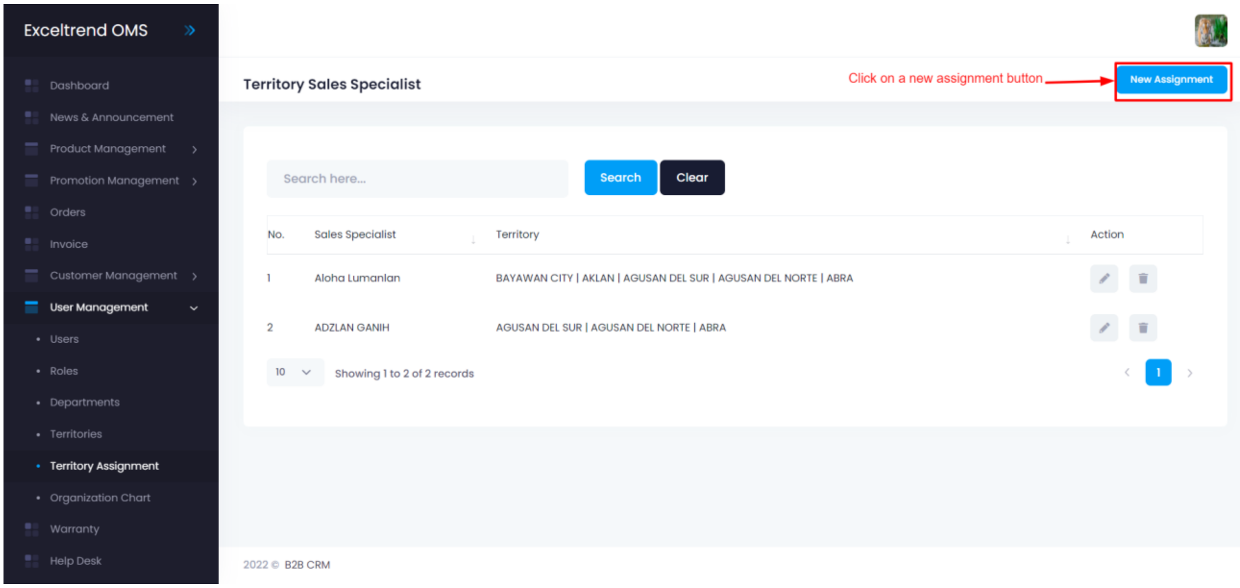


7.5 Territories Assignment: -

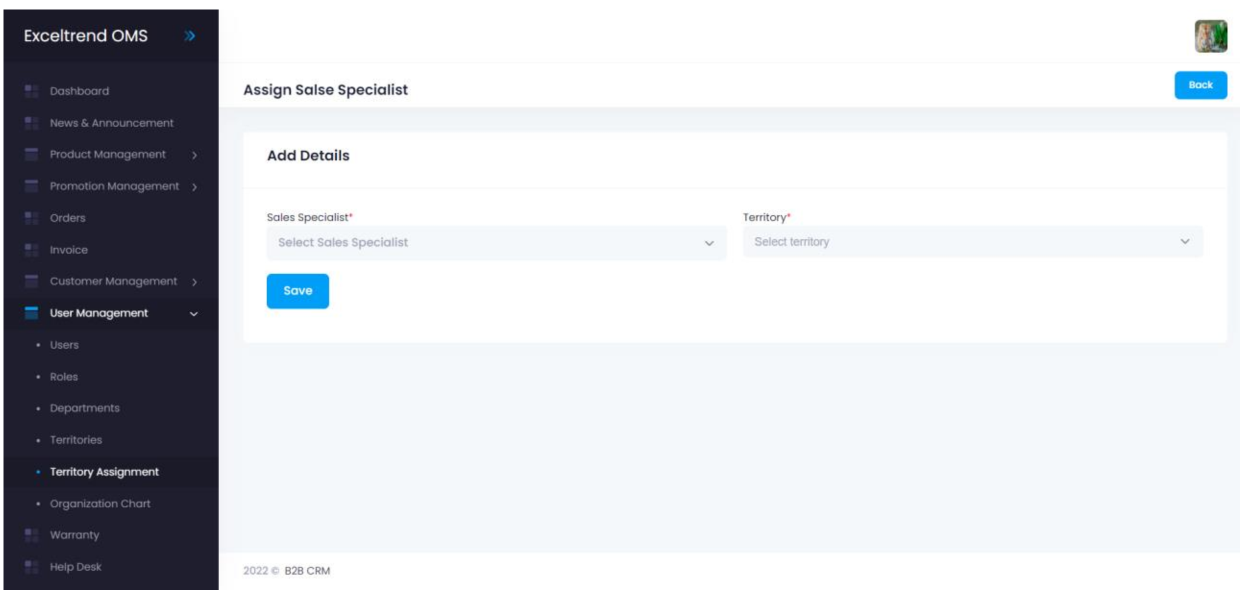
- Admin can create, edit, update, and delete the data.
- Admin can search the data using search bar.
- Video Link: - https://www.screencast.com/t/DV4M96CwV

7.5.1 Steps: - How to create a new assignment.

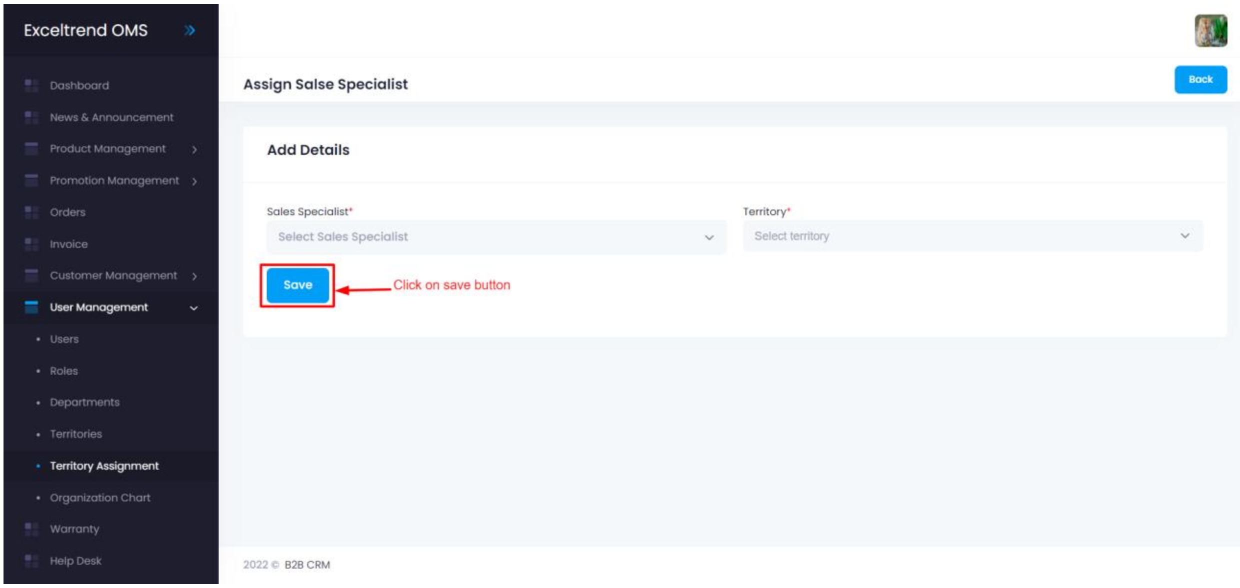
- Steps 1: - Click on a new assignment button.



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

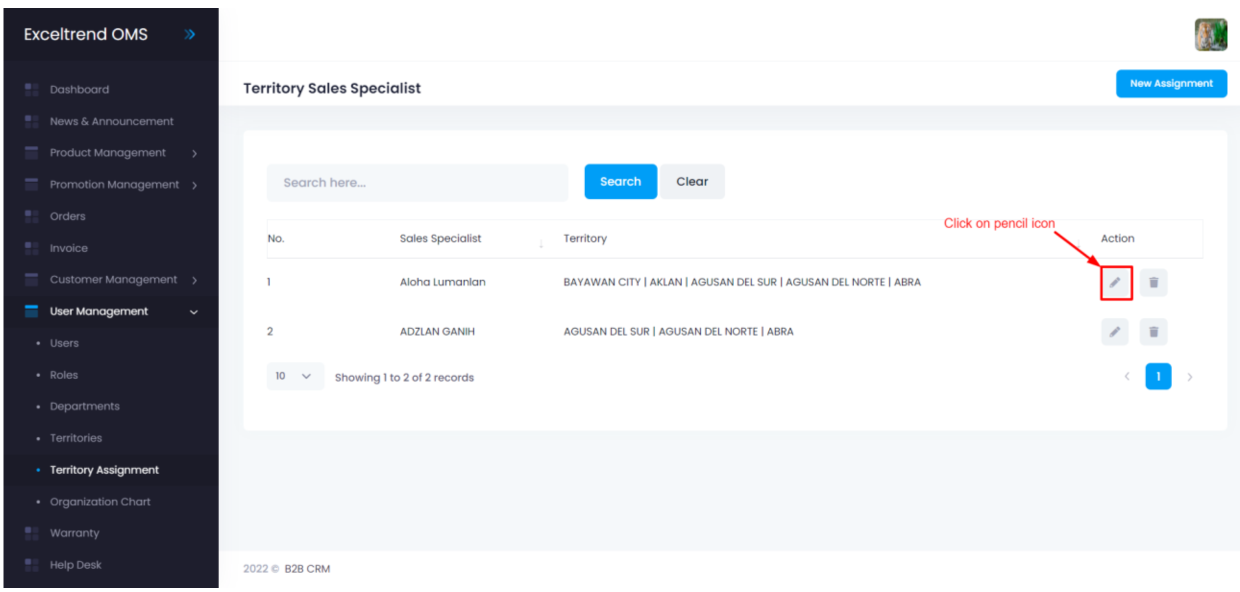


- Steps 3: - Click on save button.

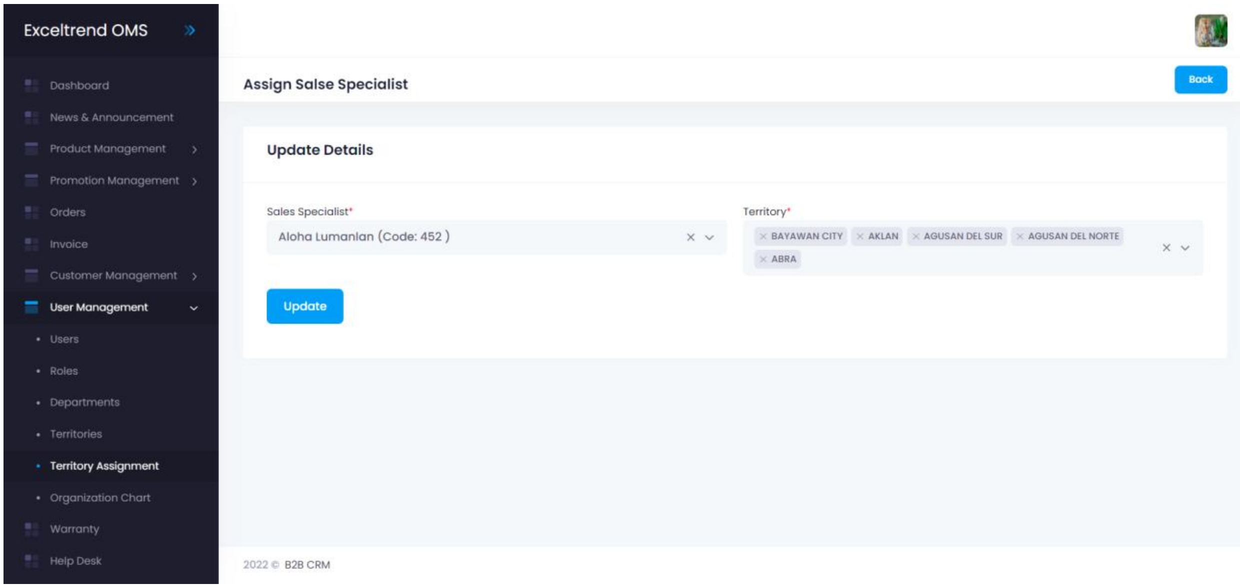


7.5.2 Steps: - How to edit an assignment.

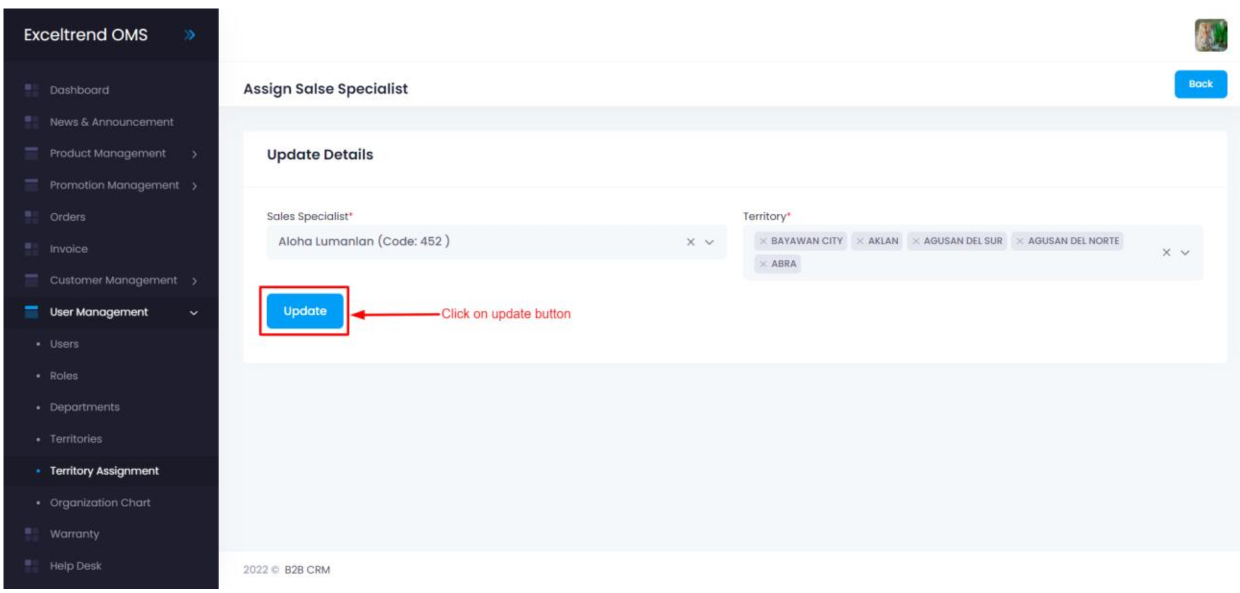
- Steps 1: - Click on pencil icon.



- Steps 2: - Update the data.

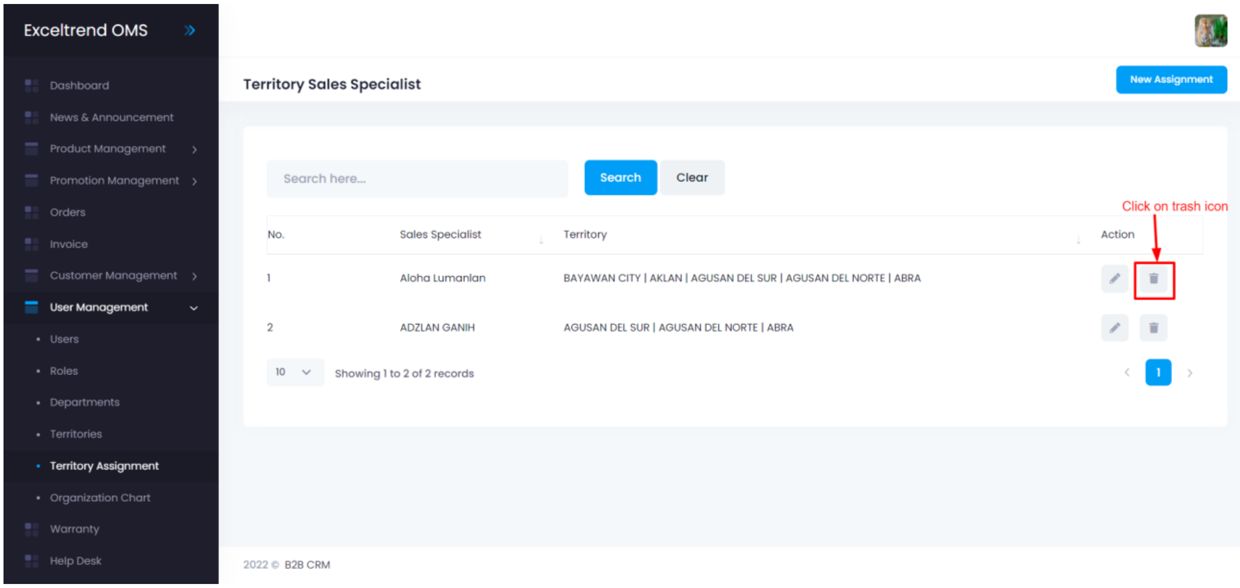


- Steps 3: - Click on update button.

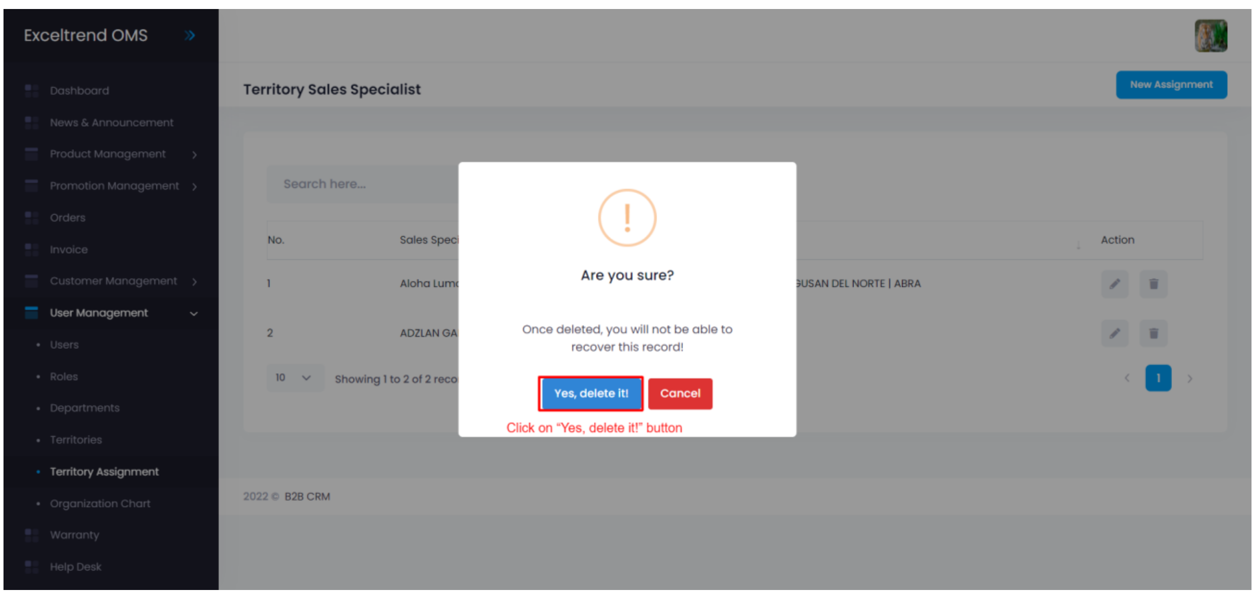


7.5.3 Steps: - How to delete the assignment.

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



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



7.6 Organization Chart: -

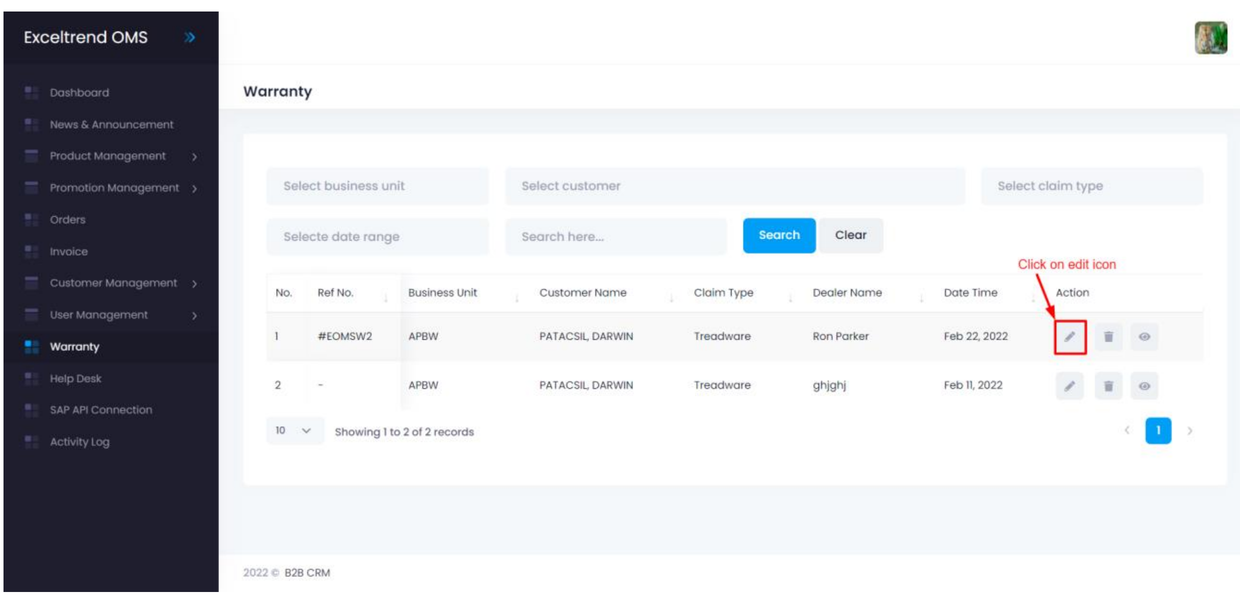
- Admin can view the hierarchy of role.

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: -

8.1 Steps: - How to edit the warranty.

- Steps 1: - Click on edit icon.



- 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

Back

Update Details

Date*: February 22, 2022

Type of Warranty Claim*: Treadware

Customer Name*: PATACSIL, DARWIN

Customer Email*: e0582-2@mailinator.com

Customer Phone*: 9714587544

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*: i10

Year*: 2020

Vehicle Model*: Sport

License Plate*: XY25U412

Vehicle Mileage*: 10

PC/LT Tire Position

- [x] LF
- [x] RF
- [x] LR
- [x] RR

Tire Mileage: Enter tire mileage

Tire Serial No.: Enter tire serial no.

2 Wheels/TB Tire Position

- [x] Front
- [x] Drive
- [x] Trailer

Tire Mileage: Enter tire mileage

Tire Serial No.: Enter tire serial no.

Reason for tire return*: Quality Not good

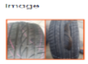
Location of damage

- [x] Tread
- [x] Sidewall
- [ ] Shoulder
- [ ] Bead
- [ ] Others

Claim Points

	Yes	No
1. Wearing (shoulder wear, center wear, one-sided wear, or any irregular wear on tread)		
- Shoulder		✓
- Center	✓	
- On-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. Abrasion 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:		
- cracks 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	✓	
- 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 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 Manifistation Probable Cause

No.	Image	Manifistation	Probable Cause(s)	Yes	No
1.		• Deformation or bulging of the tread area.	• Decohession or loss of bond between tread plies & rubber element caused by excessive stresses and heat build up. • Oxidation of the tread plies. • Unrepaired tread cuts or puntures. • Faulty repair		✓

Pictures of the Tire focusing on Damage Areas

Title *: Tread Area — Upload Image *: Choose File No file chosen

Title *: Sidewall Area — Upload Image *: Choose File No file chosen

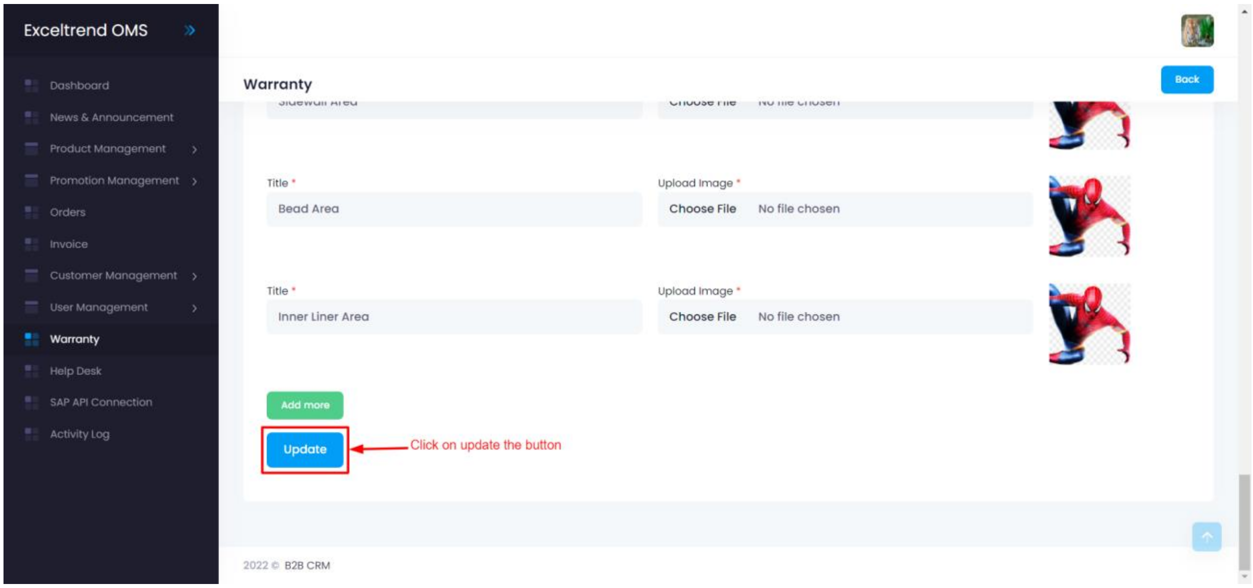
Title *: Bead Area — Upload Image *: Choose File No file chosen

Title *: Inner Liner Area — Upload Image *: Choose File No file chosen

Add more

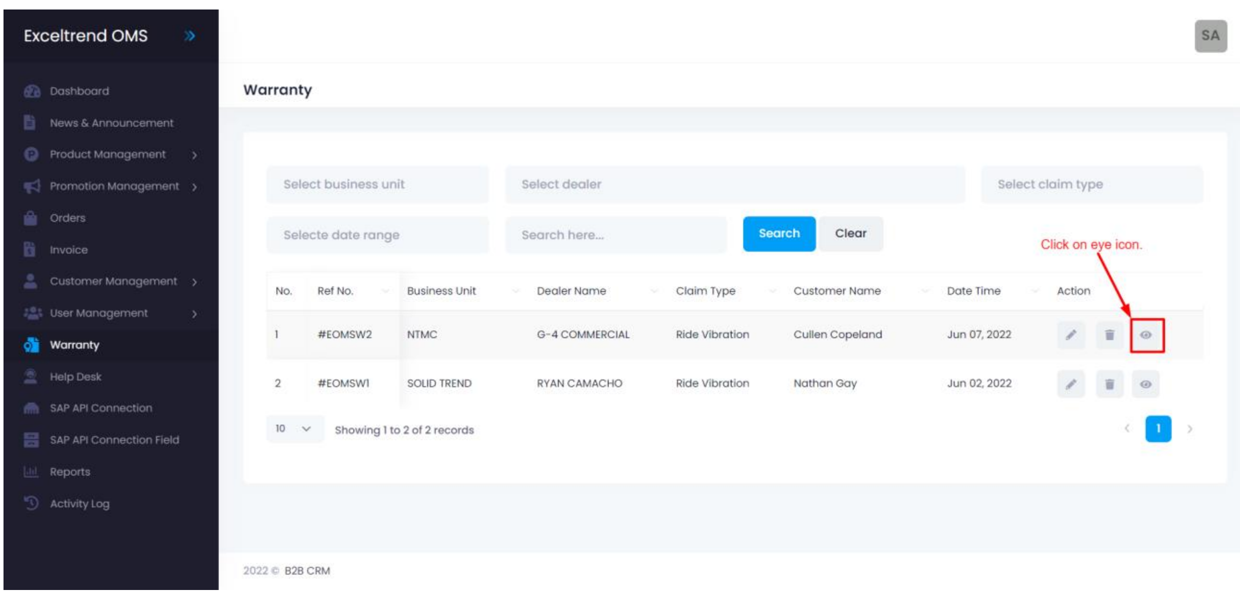
Update

- Steps 3: - Click on update the button.



8.2 Steps: - How to view the warranty.

- Steps 1: - Click on eye icon.



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

Exceltrend OMS

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

Warranty

Back

View Details

Date Time :	Feb 22, 2022
Type of Warranty Claim :	Treadwear
Ref No :	#EOMSW2
Business Unit :	APBW
Customer Name :	PATAC SIL DARWIN
Customer Email :	e0582_2@mailinator.com
Customer Phone :	9714587544
Customer Location :	US
Customer Telephone :	9714587544
Customer Address :	US
Dealer Name :	Ron Parker
Dealer Location :	UK
Dealer Telephone :	8574201245
Dealer Fax :	–

Tire & Vehicle Info

Vehicle Maker :	I10
Vehicle Model :	Sport
Vehicle Mileage :	10
Year :	2020
License Plate :	XY25U412
PC/LT Tire Position :	LF, RF, LR, RR
PC/LT Tire Mileage :	–
PC/LT Tire Serial No. :	–
2 Wheels/TB Tire Position :	Front, Drive, Trailer
2 Wheels/TB Tire Mileage :	–
2 Wheels/TB Tire Serial No. :	–
Reason for tire return :	Quality Not good
Location of damage :	Tread, Sidewall

Claim Points

	Answer
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 puncture on the tire – indicate if penetrated or not.	
– Penetrated	No
– Not Penetrated	No
3. If the tire is repaired, indicate if the repair is hot process or cold patch.	
– Hot Process	No
– Cold Process	Yes
4. Abrasion or impact marks near the complaint area of the tread/shoulder, sidewall, bead area.	
Tread	Yes
Shoulder	Yes
Sidewall	Yes
– Bead	Yes
5. Check for any irregularities on the bead. Below are some irregularities:	
– cracks on the bead area (circumferential or not)	Yes
– deformation on the bead (triangulated or any sign of improper bead seating)	No
evidence of bead heating and bead rubber brittleness	Yes
sign of mounting / demounting damage on bead	Yes
bulge or separation on the bead area.	No
narrow rim (check/measure bead to bead clearance) It should be within standard rim as indicated on the sidewall/tire.	No
traces of chemicals or oil used during tire mounting.	Yes
6. Inner liner manifestations:	
– sign of crease or stress marks	Yes
– improper repair or repair failure	Yes
– inner liner cracks near the bead area of the damage	No
– any sign of running the tire in underinflated condition.	Yes

Tire Manifistation Probable Cause

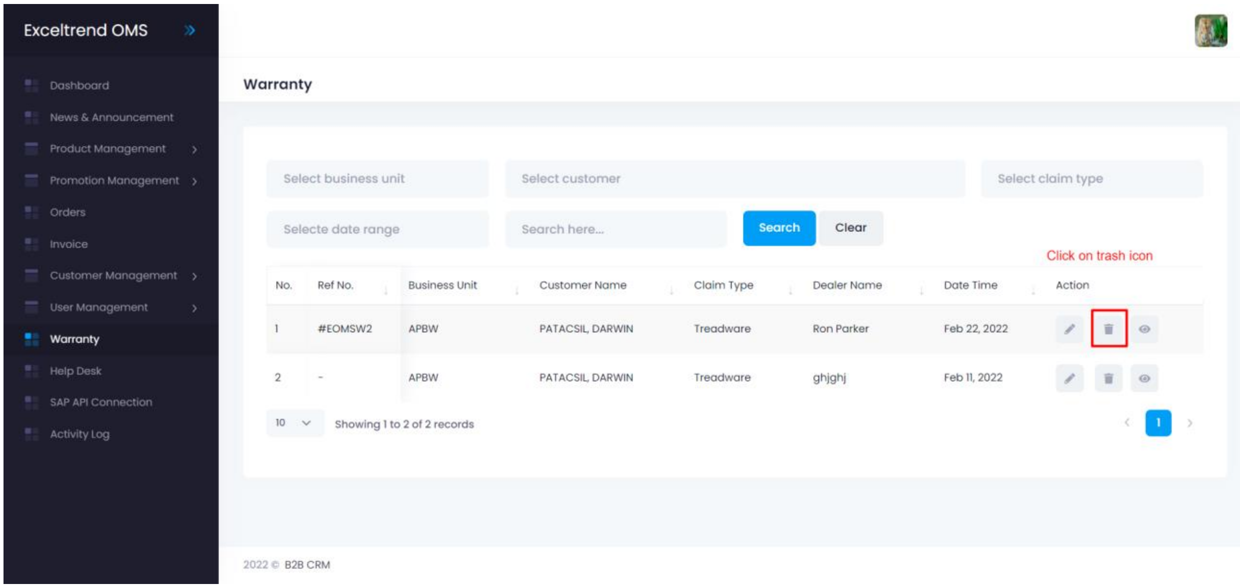
No	Image	Manifistation	Probable Cause(s)	Answer
1.		• Deformation or bulging of the tread area.	• Decohession or loss of bond between tread plies & rubber element caused by excessive stresses and heat build up. • Oxidation of the tread plies. • Unrepaired tread cuts or puntures. • Faulty repair	No

Pictures of the Tire focusing on Damage Areas

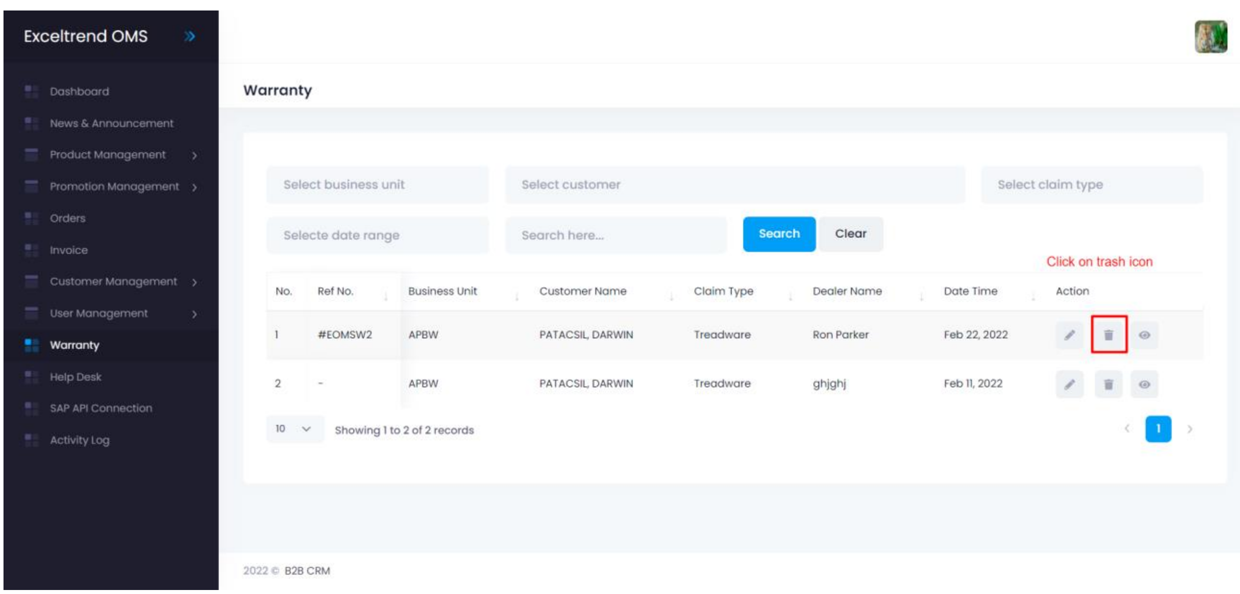
No.	Title	Image
1.	Tread Area	
2.	Sidewall Area	
3.	Bead Area	
4.	Inner Liner Area	

8.3 Steps: - How to delete the warranty.

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



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



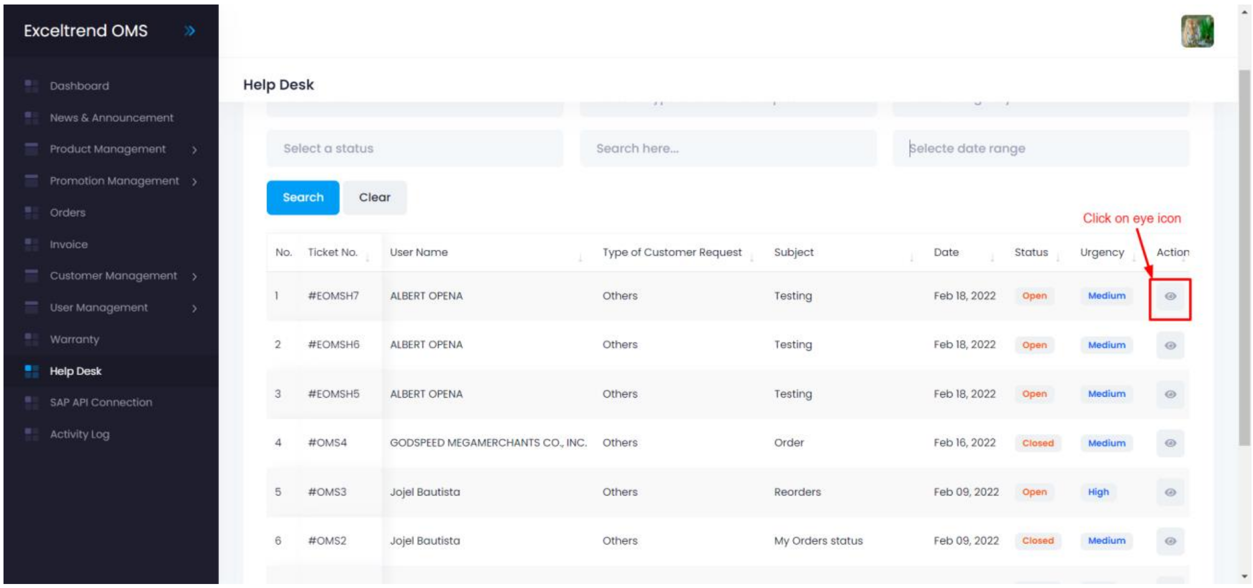
9. Help Desk: -

- 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

9.1 Steps: - How to view the ticket

- Steps 1: - Click on eye icon.



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

Exceltrend OMS

- Dashboard
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- Invoice
- Customer Management
- User Management
- Warranty
- Help Desk
- SAP API Connection
- Activity Log

Help Desk

Back

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

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.

Why do we use it?

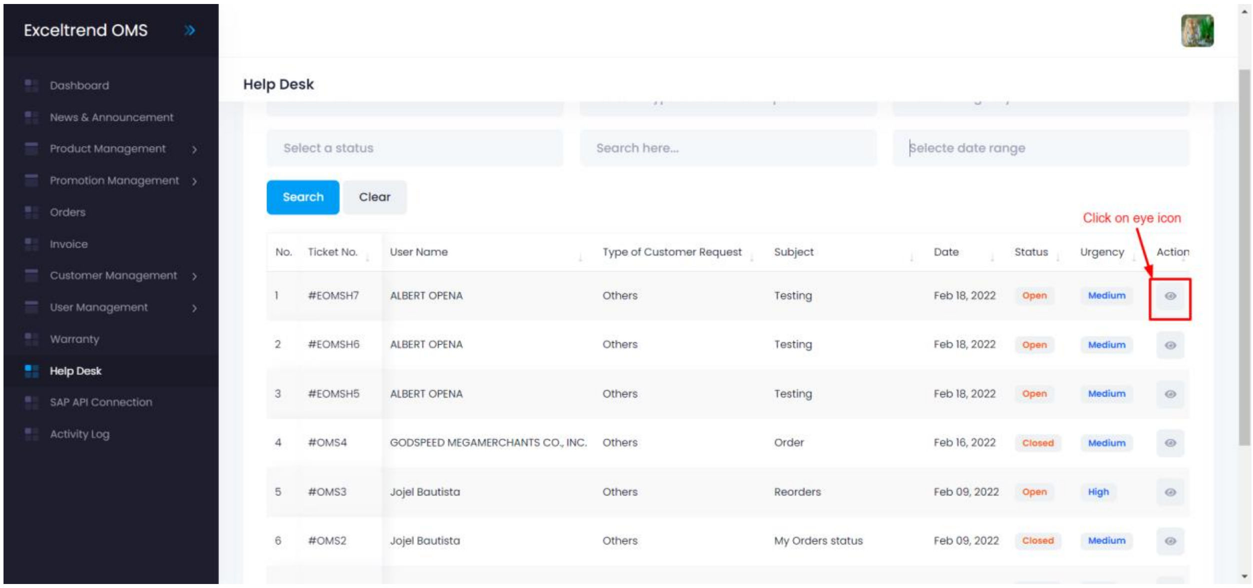
It is a long-established fact that a reader will be distracted by the readable content of a page when looking at its layout. The point of using Lorem Ipsum is that it has a more-or-less normal distribution of letters, as opposed to using 'Content here, content here, making it look like readable English. 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:

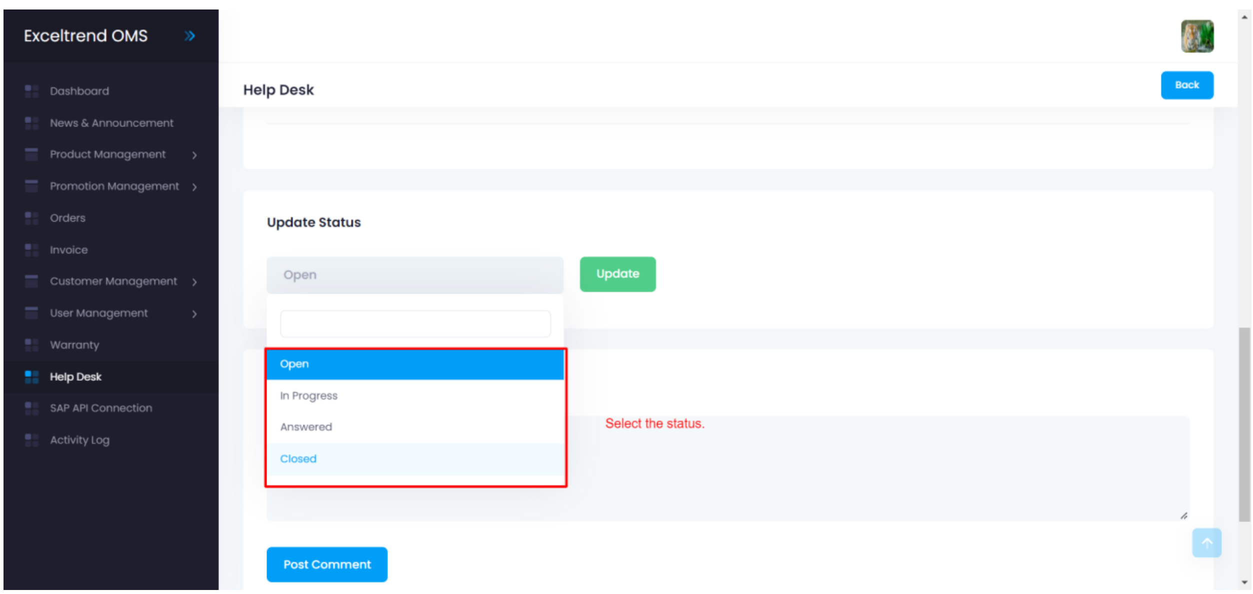
2022 © B2B CRM

9.2 Steps: - How to update the ticket status.

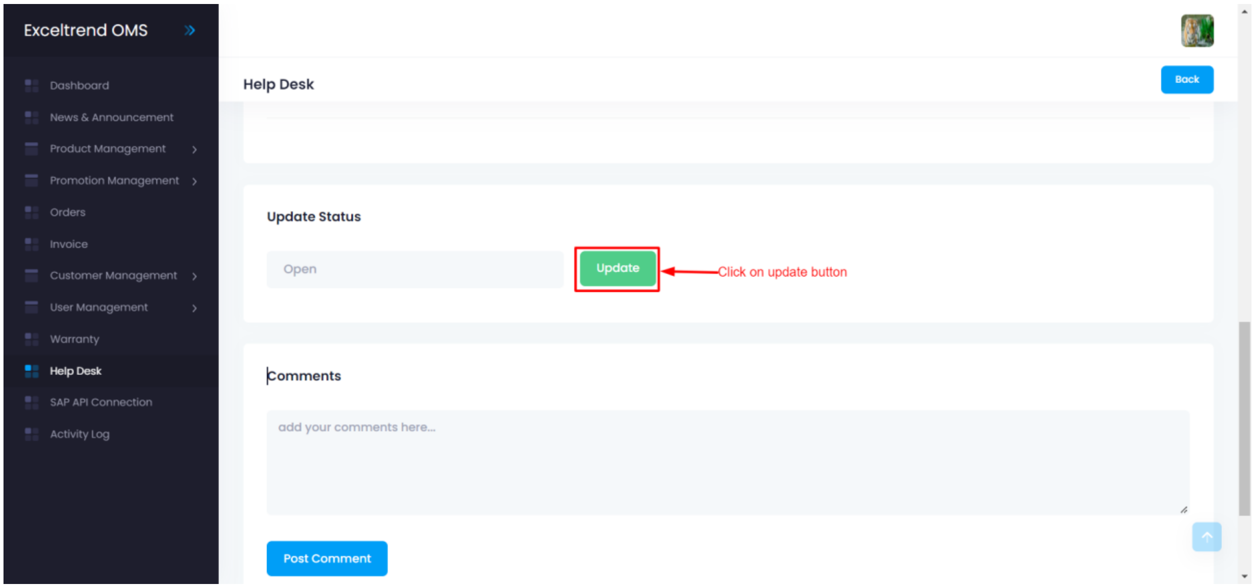
- Steps 1: - Click on eye icon.



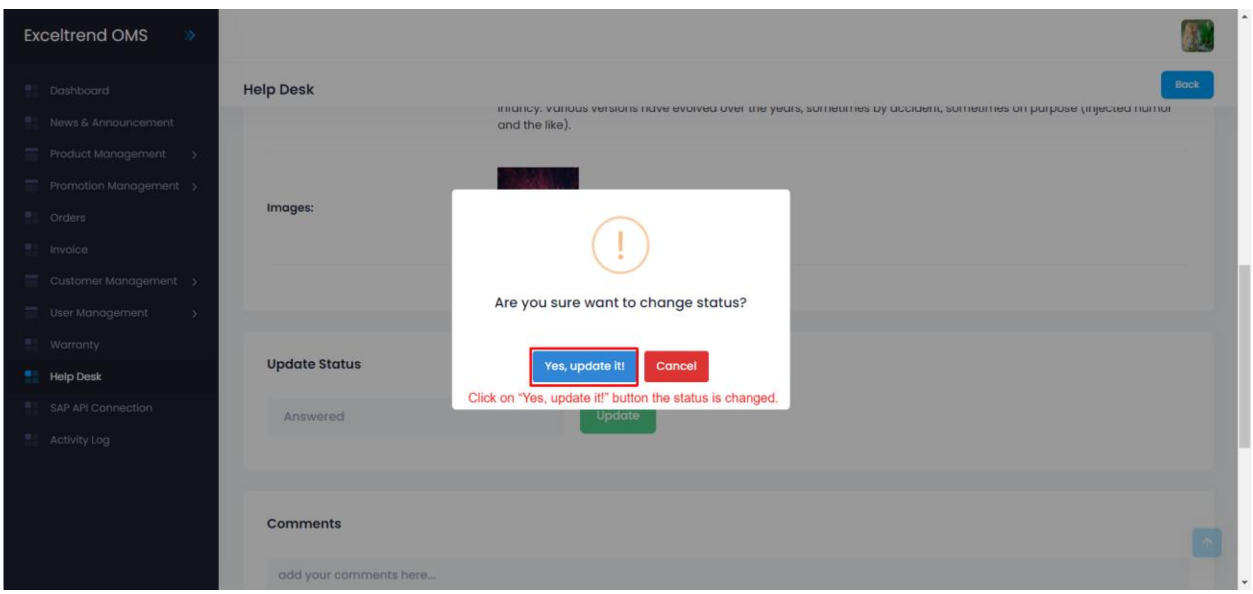
- Steps 2: - Select the status.



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

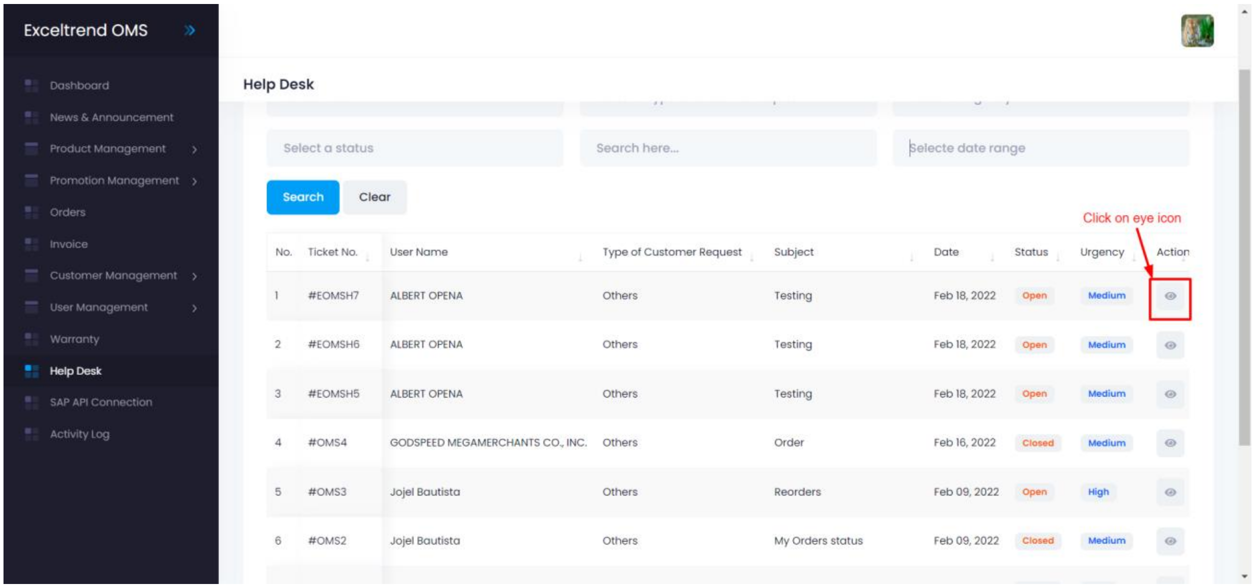


- Steps 4: - Pop-up model appear and show message "Are you sure want to change status?" and click on "Yes, update it!" button the status is changed.

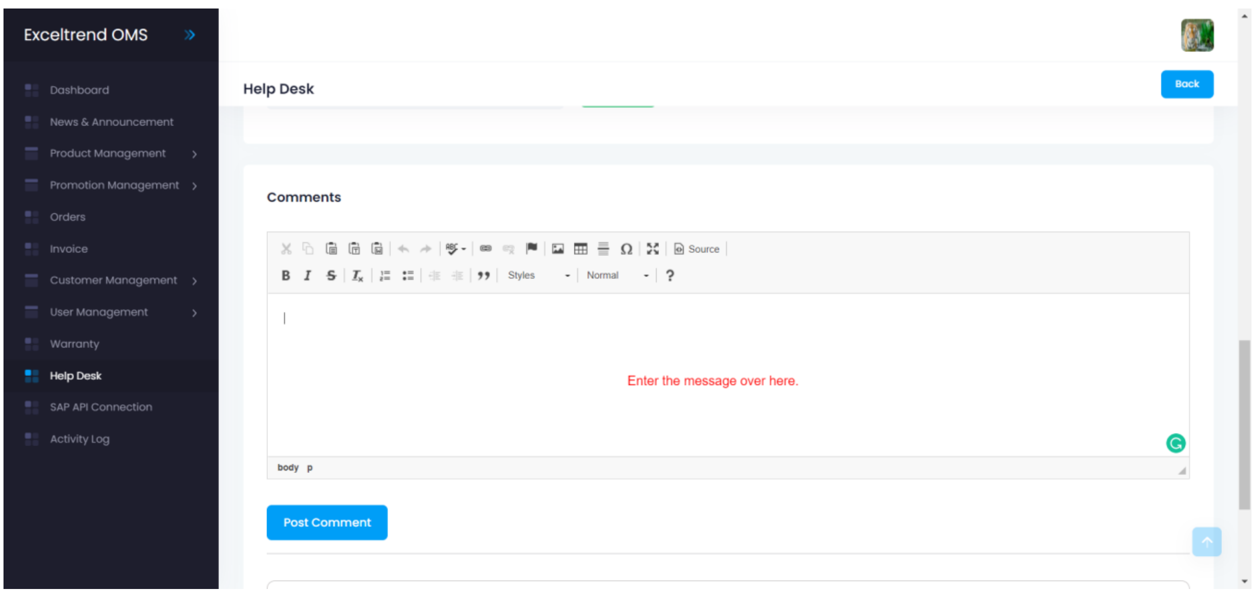


9.3 Steps: - How to reply the ticket.

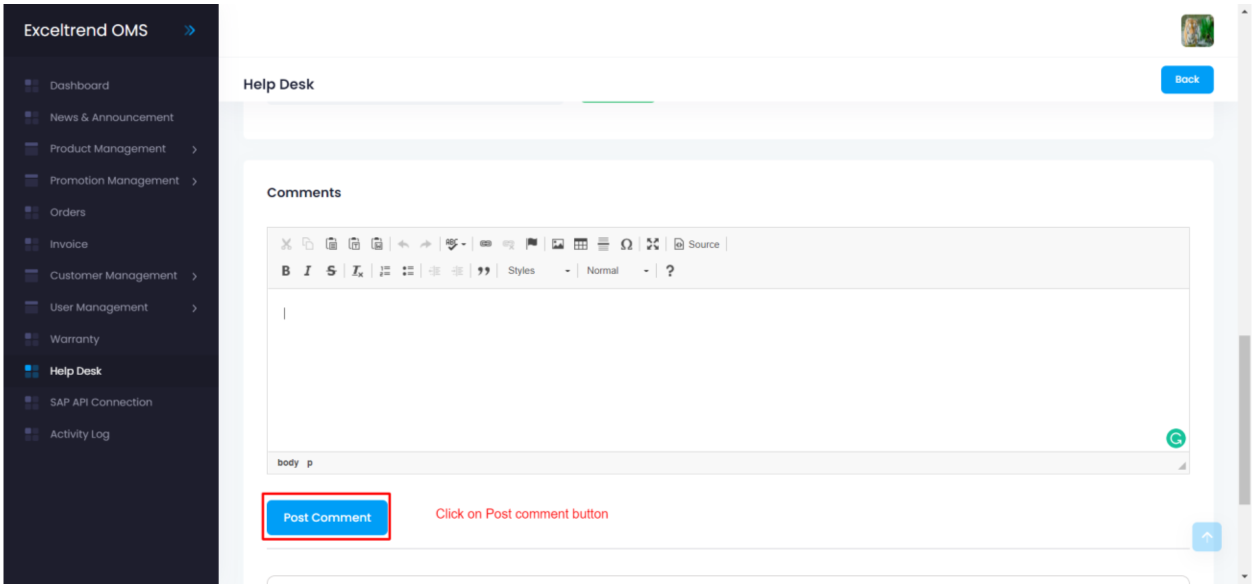
- Steps 1: - Click on eye icon.



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



- Steps 3: - Click on Post comment button.

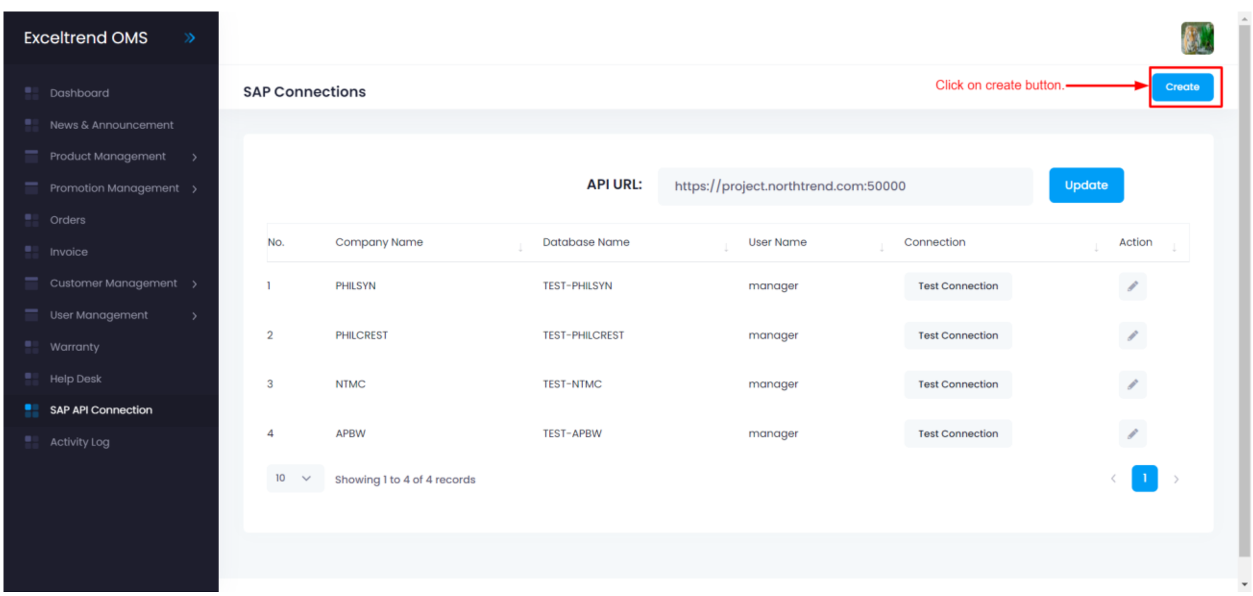


10. SAP API Connection: -

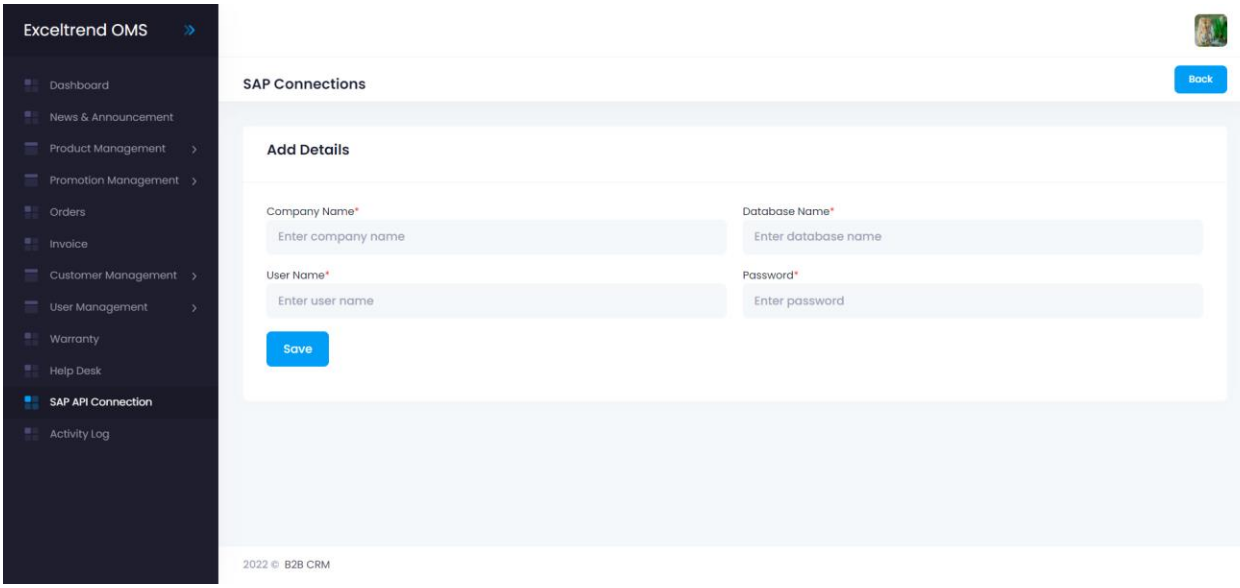
- Admin can create, edit and update the API connection.
- Admin can update the API URL.
- Video Link: - https://www.screencast.com/t/sWiX10KbbKy

10.1 Steps: - How to create an SAP API Connection.

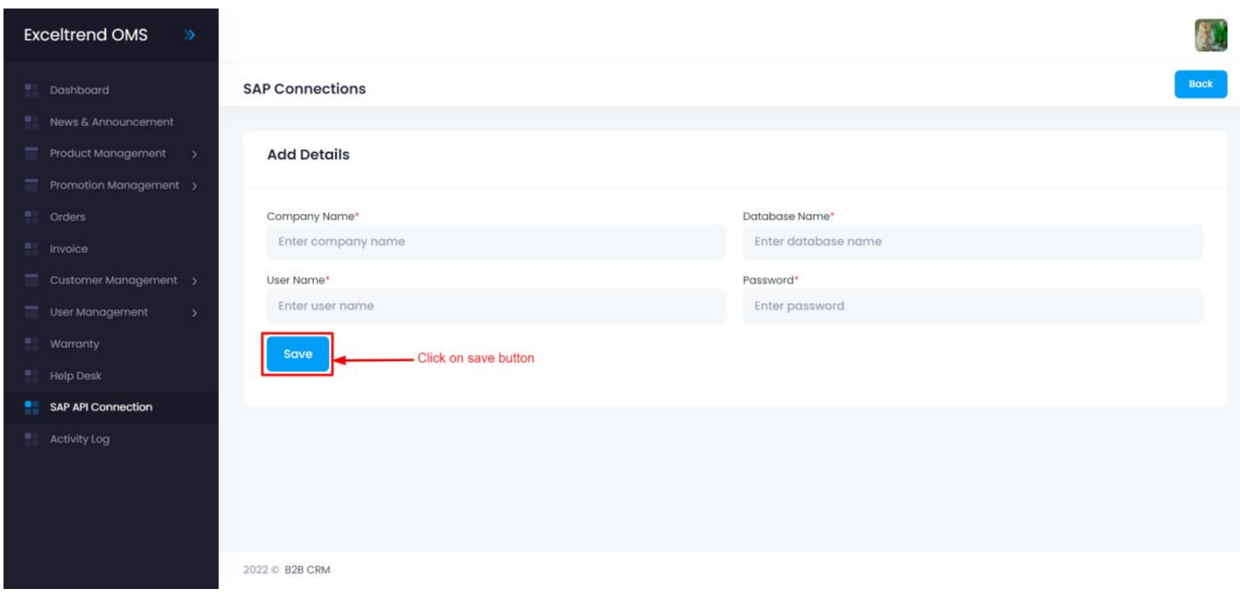
- Steps 1: - Click on create button.



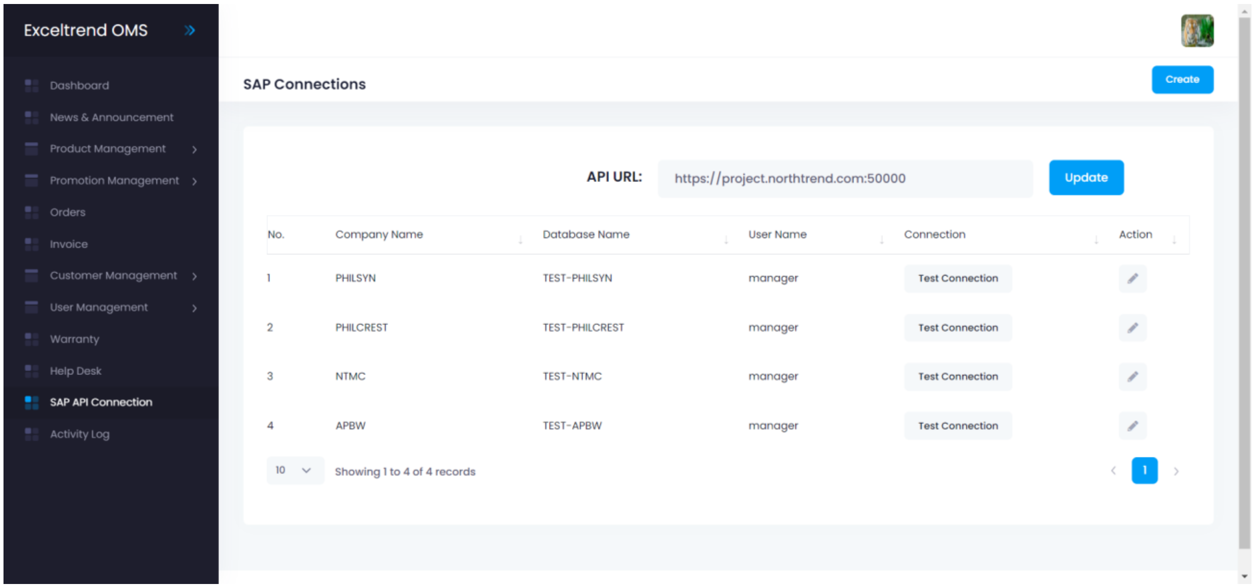
- Steps 2: - Enter the data company name, database name, user name, and password.



- Steps 3: - Click on save button.

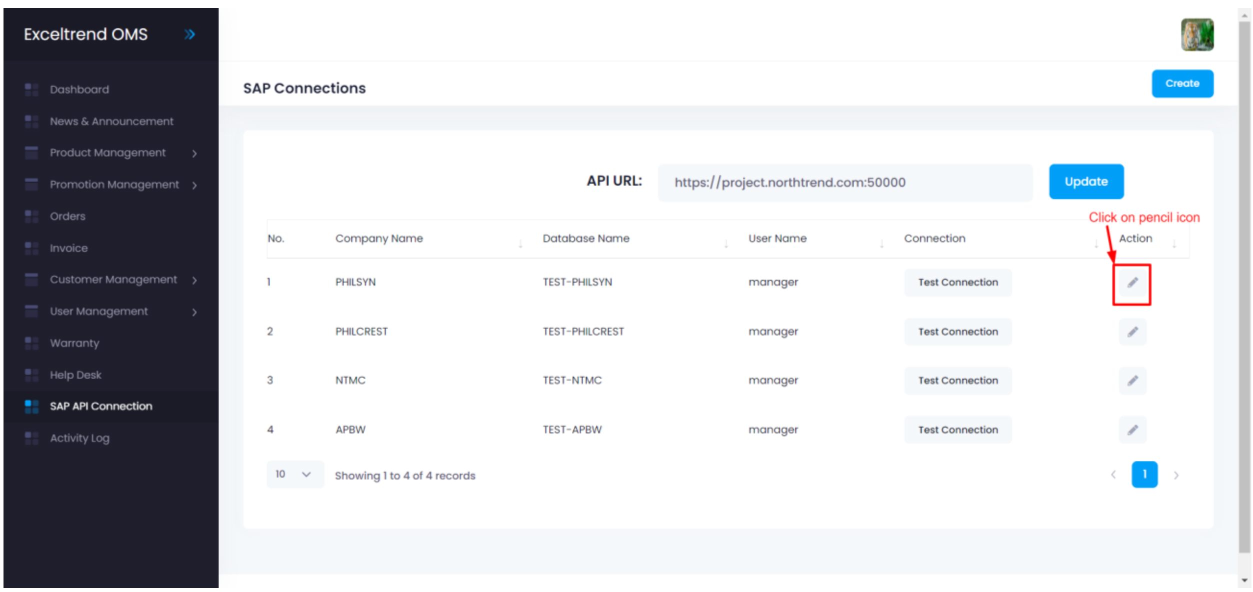


- Steps 4: - Created API show on listing page.

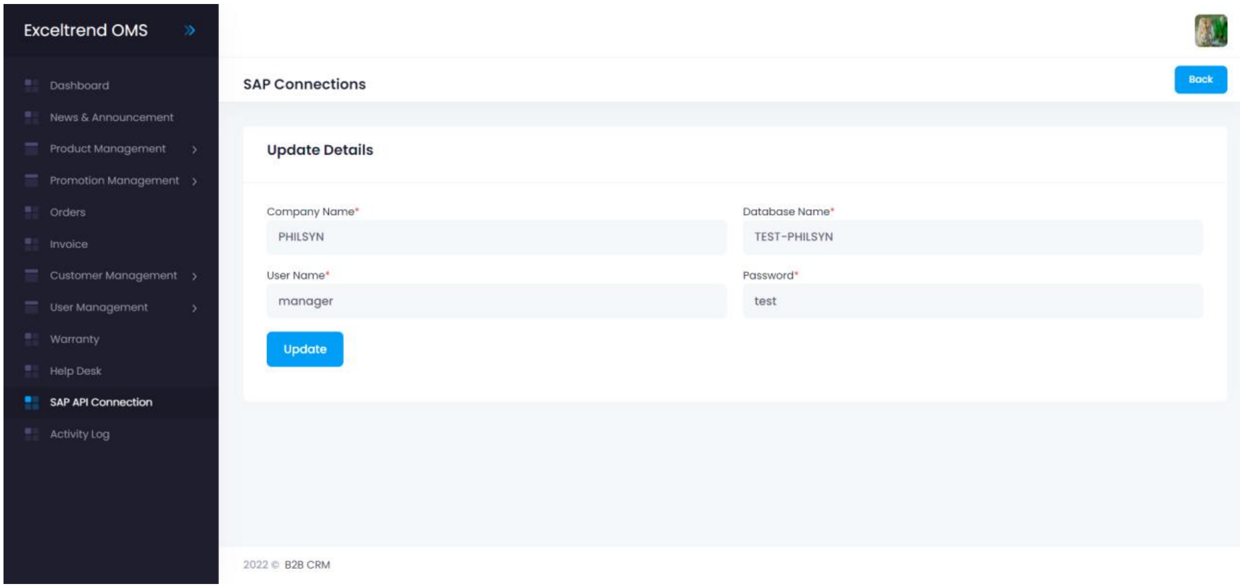


10.2 Steps: - How to edit the SAP API.

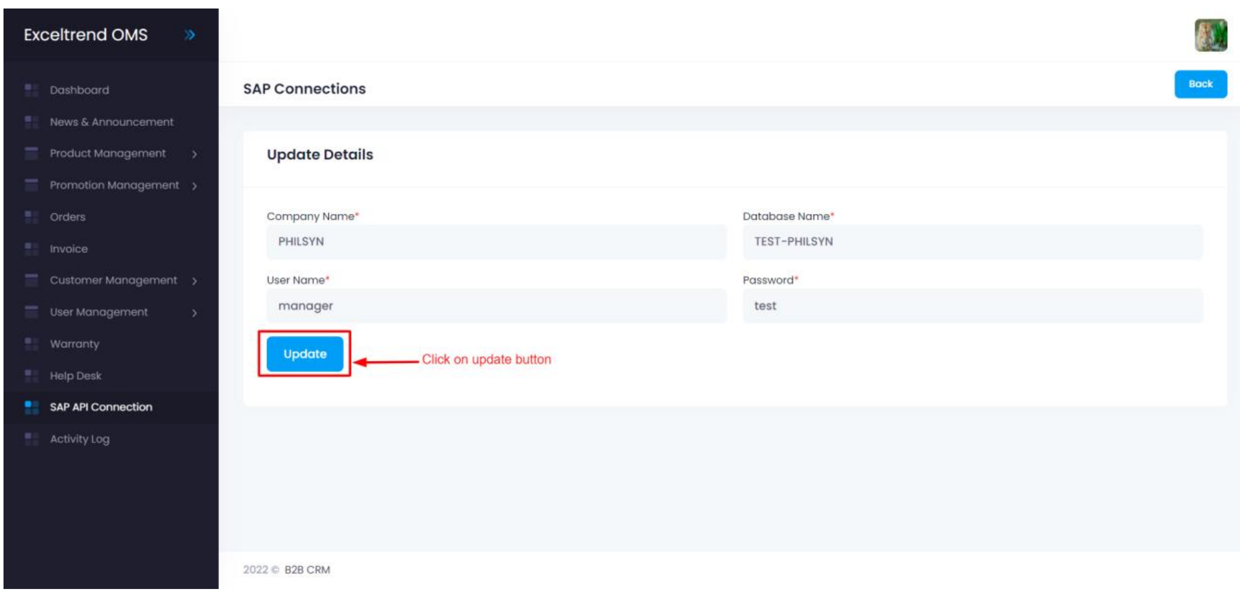
- Steps 1: - Click on pencil icon.



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



- Steps 3: - Click on update button.

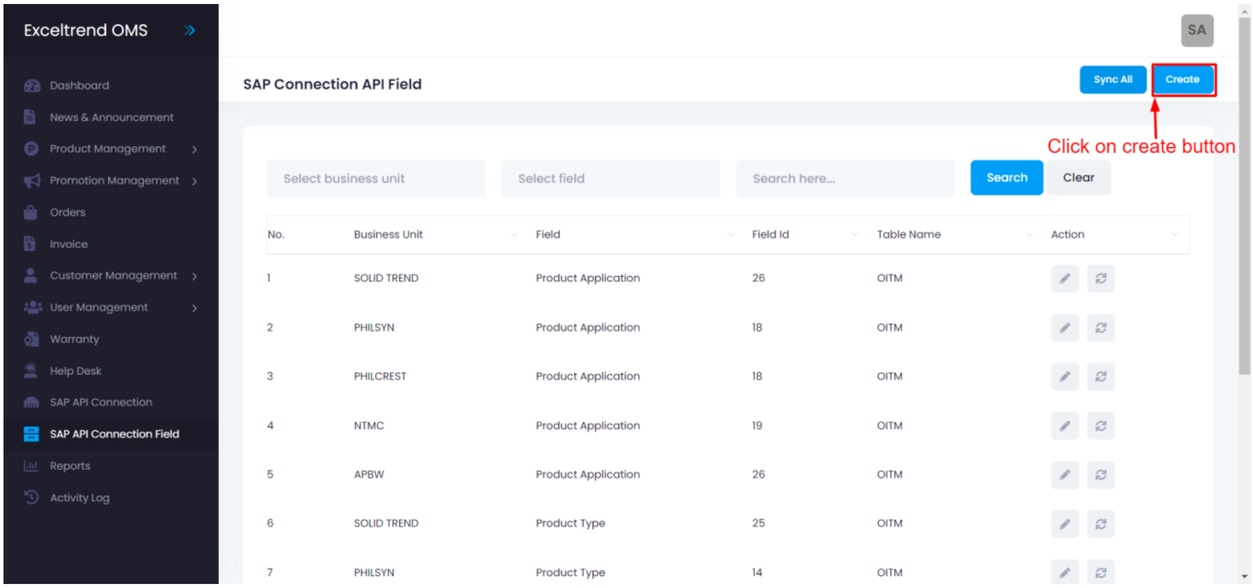


11. SAP Connection API Field: -

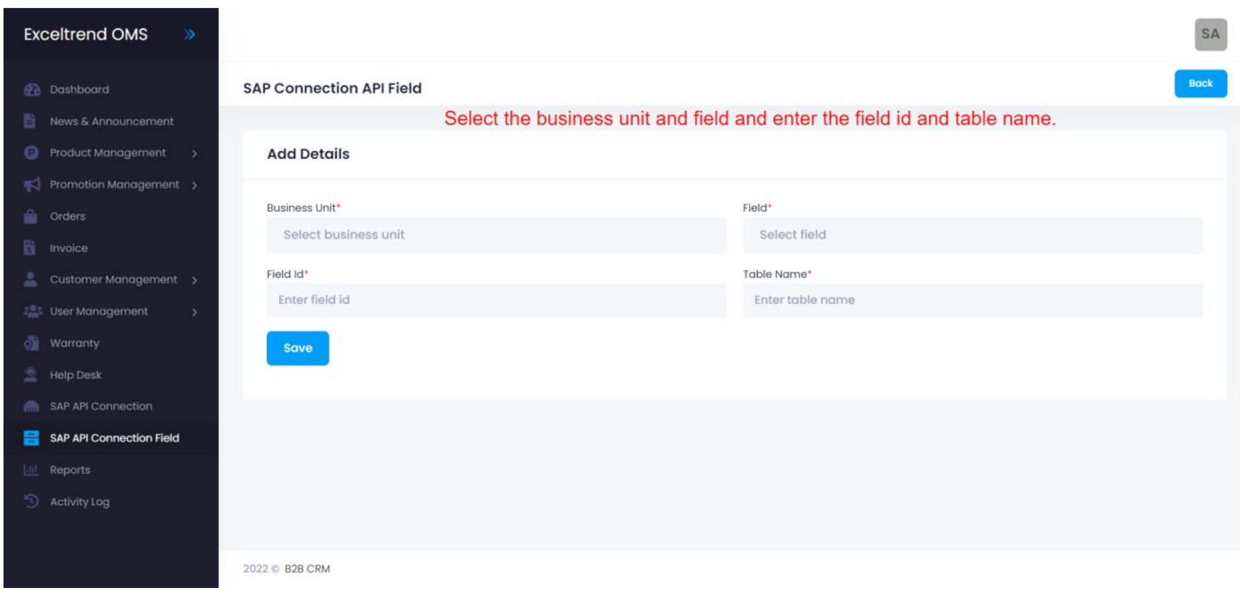
- Admin Create, edit and sync the details.
- Admin can use the different-different filter and filter the data.
- Video Link: - https://www.screencast.com/t/MzaKysHTyIM

10.1 Steps: - How to create a new SAP connection API field.

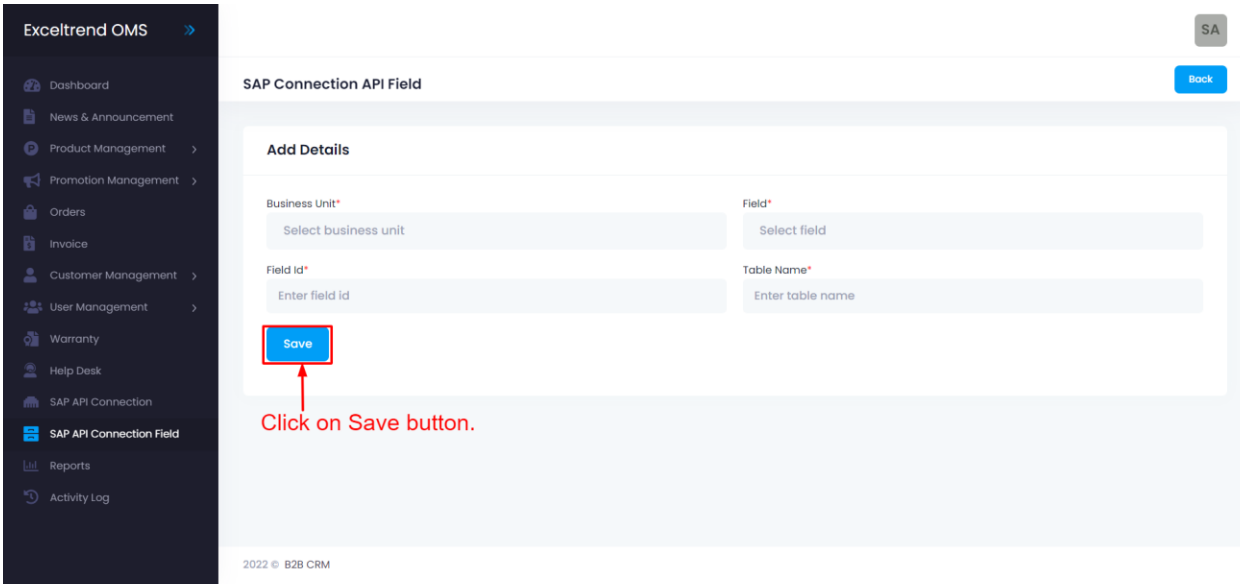
- Steps 1: - Click on create button.



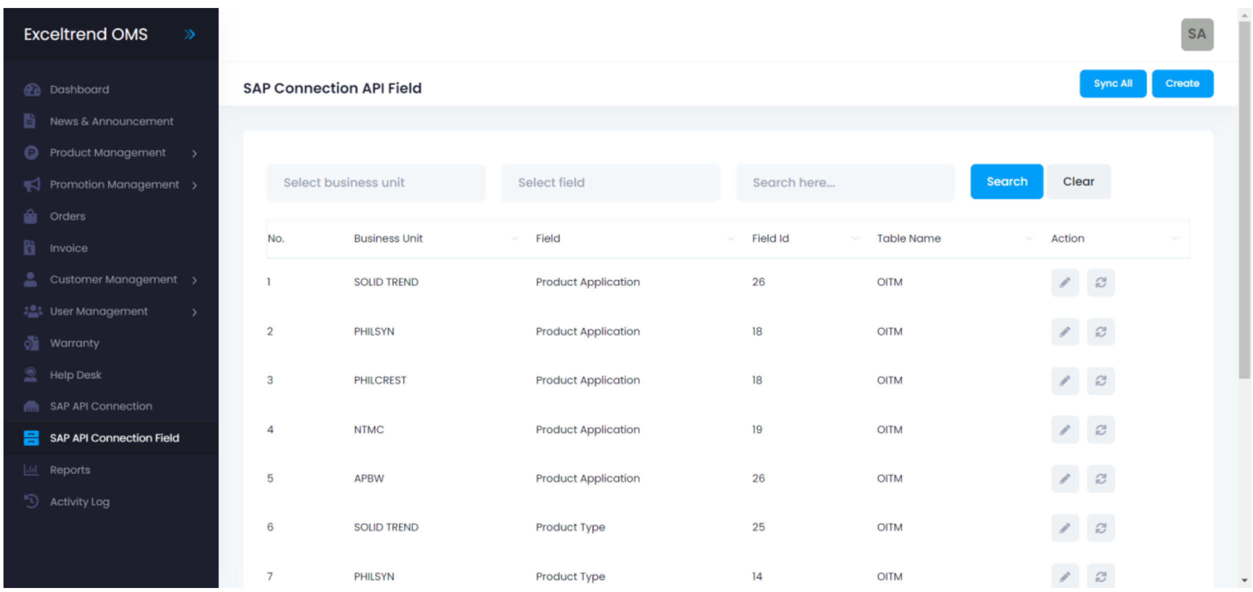
- Steps 2: - Select the business unit and field and enter the field id and table name.



- Steps 3: - Click on Save button.

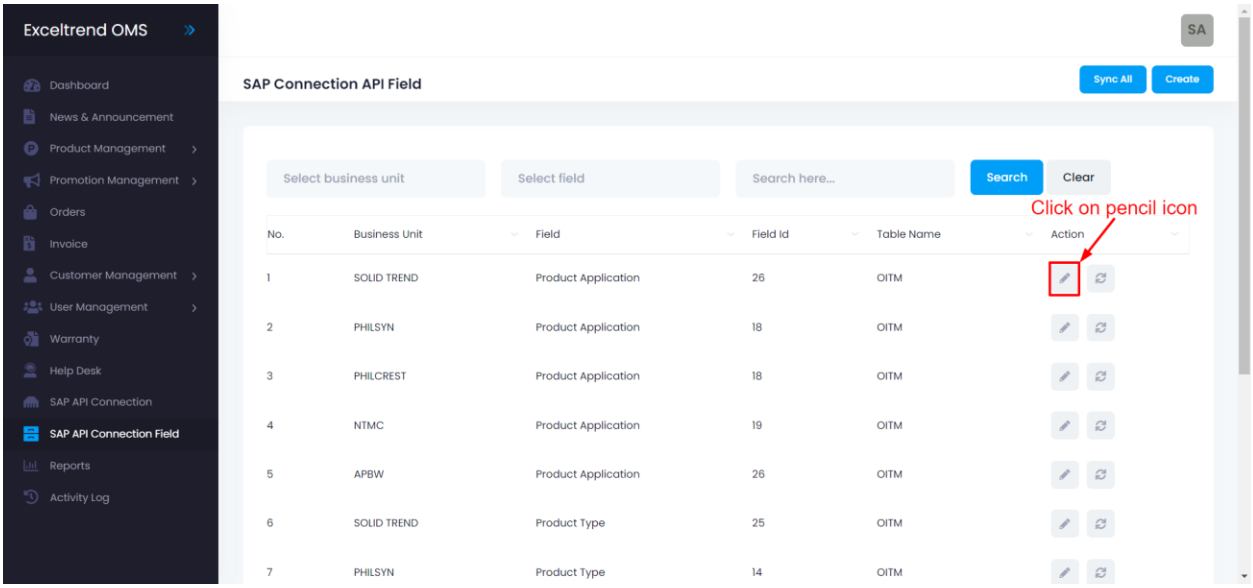


- Steps 4: - Created SAP connection API show on listing page.

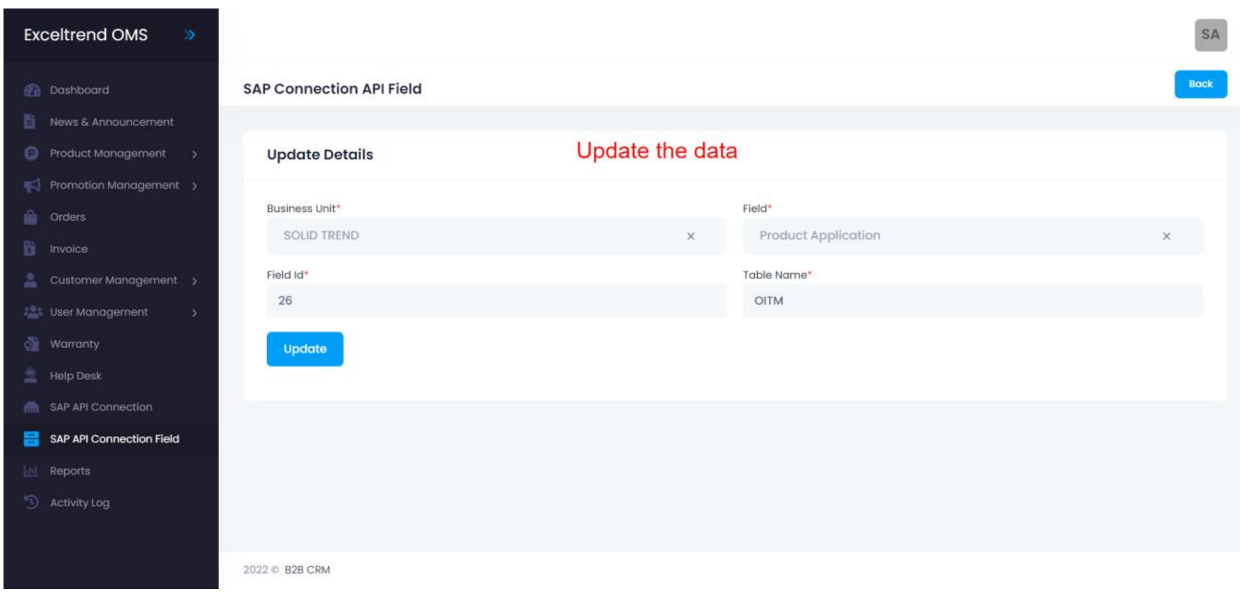


10.2 Steps: - How to edit the SAP connection API field.

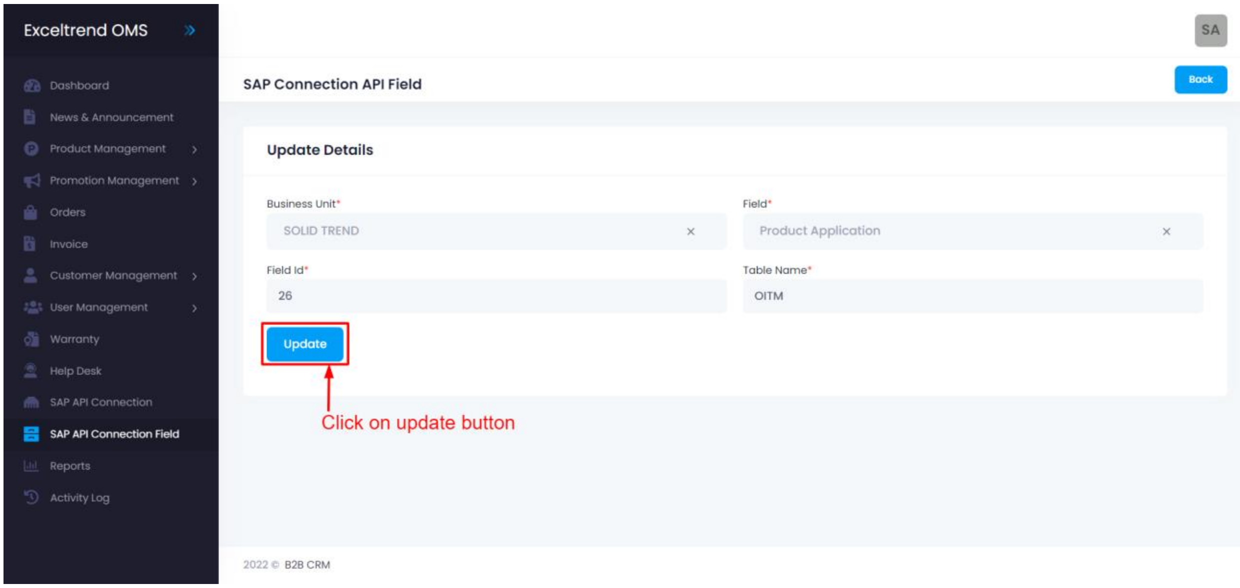
- Steps 1: - Click on pencil icon.



- Steps 2: - Update the data.



- Steps 3: - Click on update button.



12. Report: -

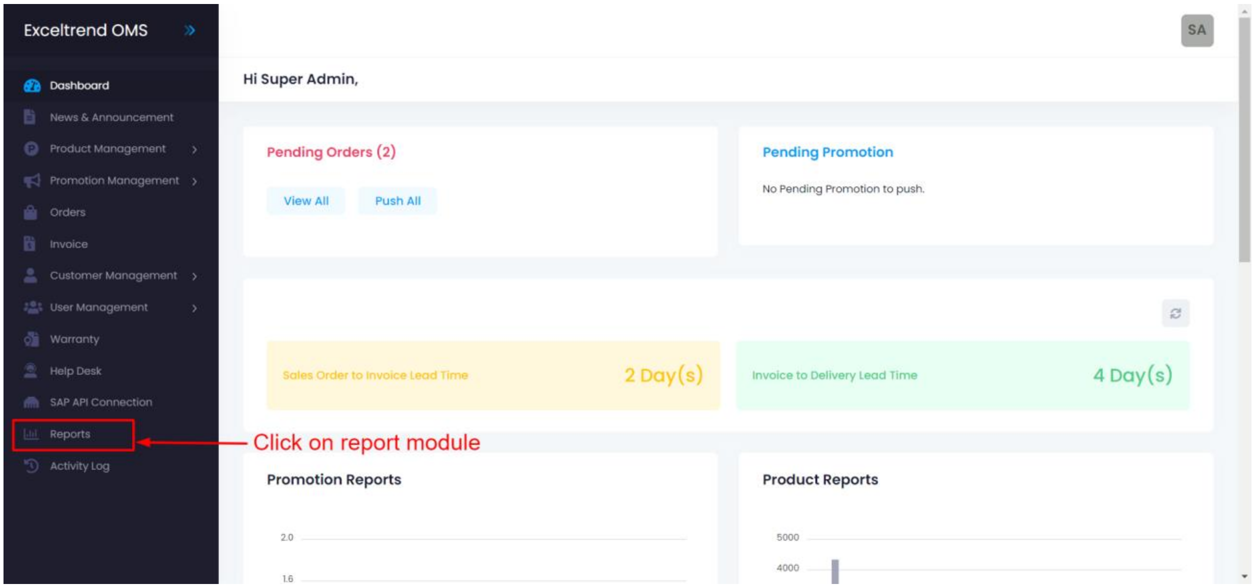
- Admin can see the all type of report in this module.
- Report module inside different type report show.
- Admin can show the all report in particular report page.

12.1 Promotions Report: -

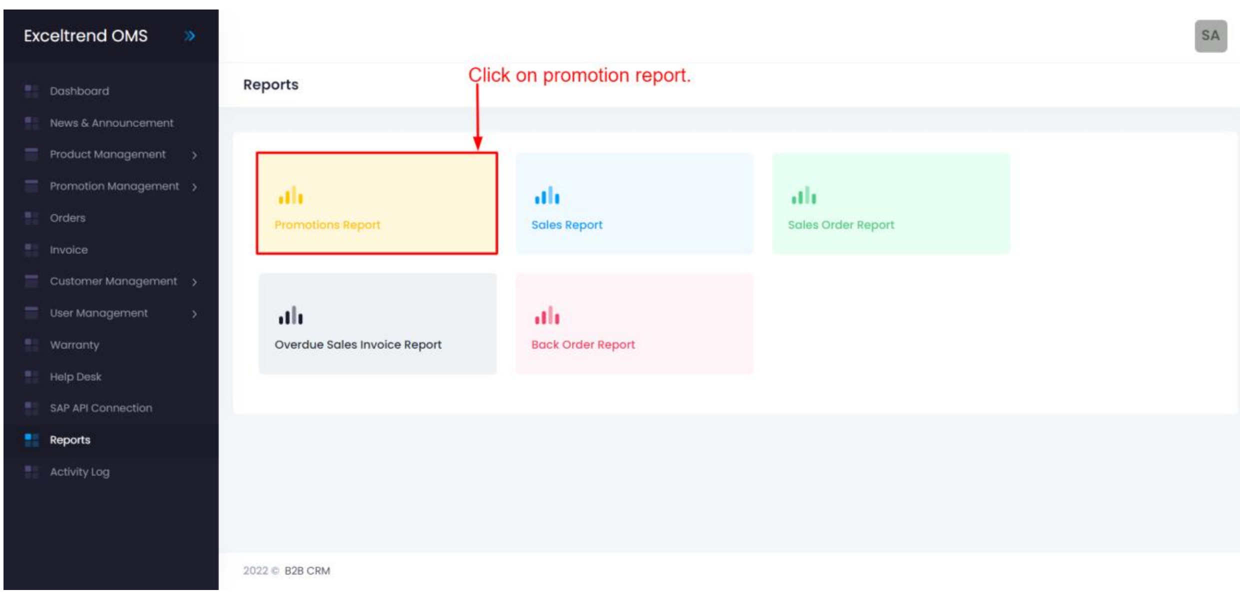
- Admin can see the promotion report in particular report page.
- Admin can see the all-promotion details in this report.
- Admin can use the different-different filter and filter the data.
- Video Link: - https://www.screencast.com/t/Y3ASTHAaP9C

12.1.1 Steps: - How to see the promotions report.

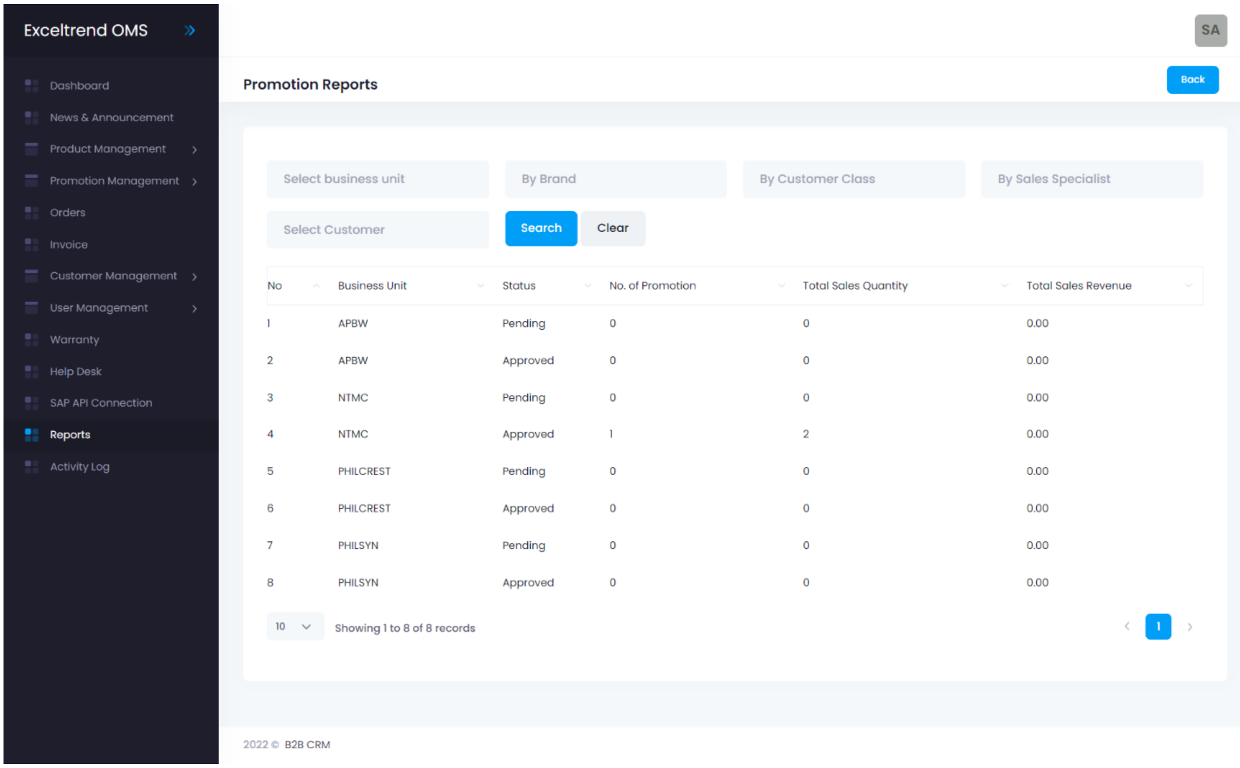
- Steps 1: - Click on Report module.



- Steps 2: - Click on promotions report.



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

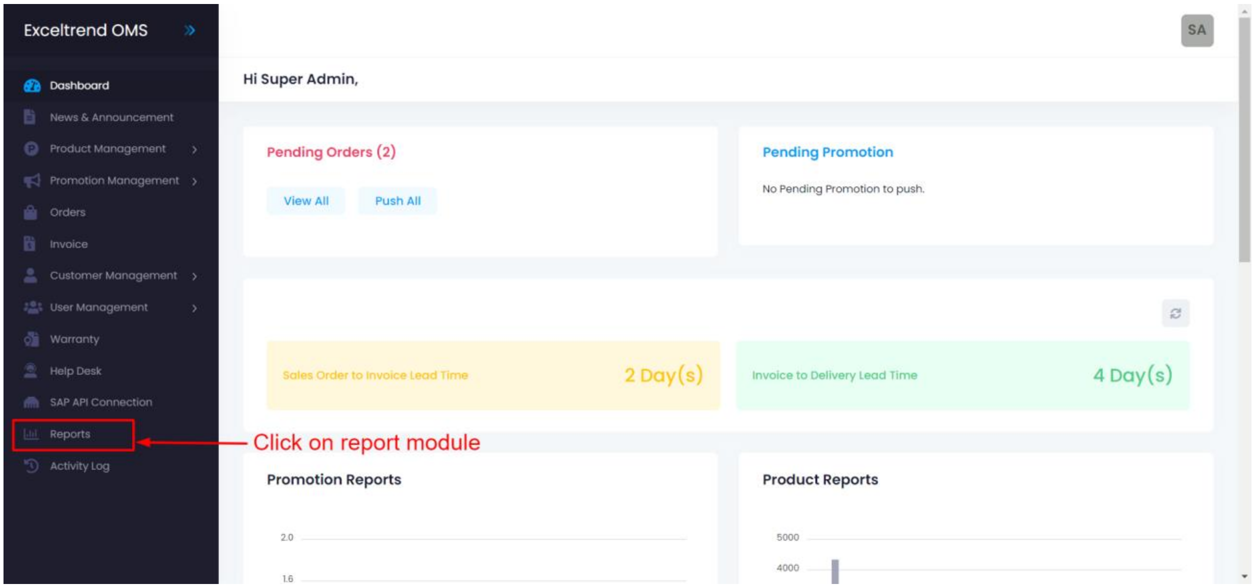


12.2 Sales Report: -

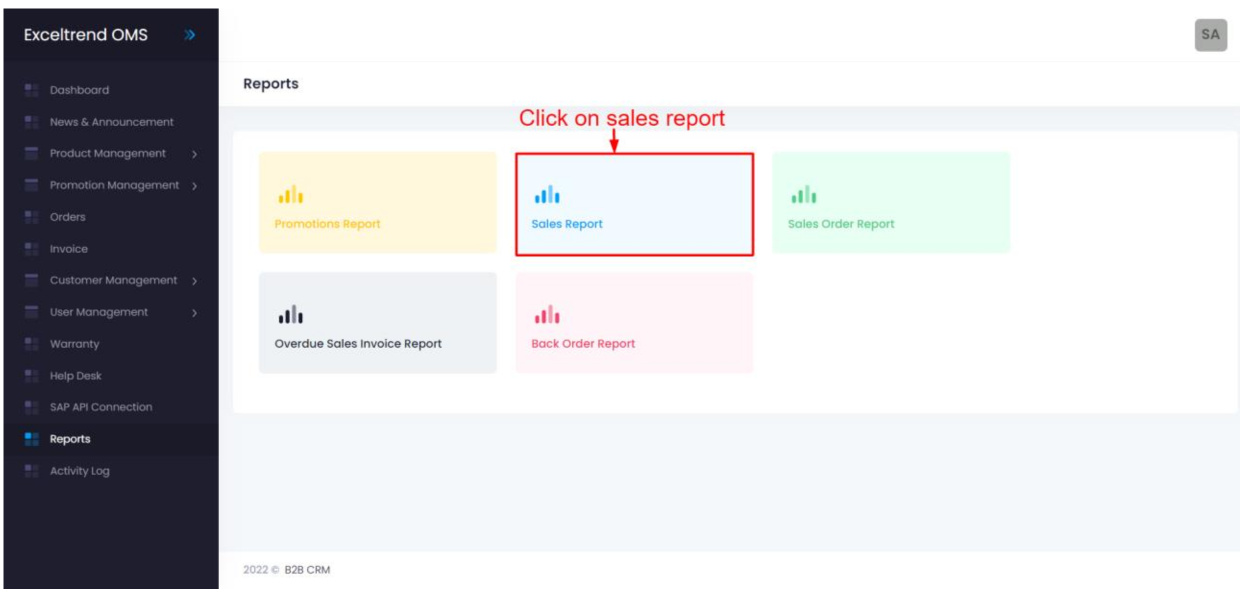
- Admin can see the sales report in particular report page.
- Admin can see the all sales details in this report.
- Admin can use the different-different filter and filter the data.
- Video Link: - https://www.screencast.com/t/ACH1WTp5ax

12.2.1 Steps: - How to see the sales report.

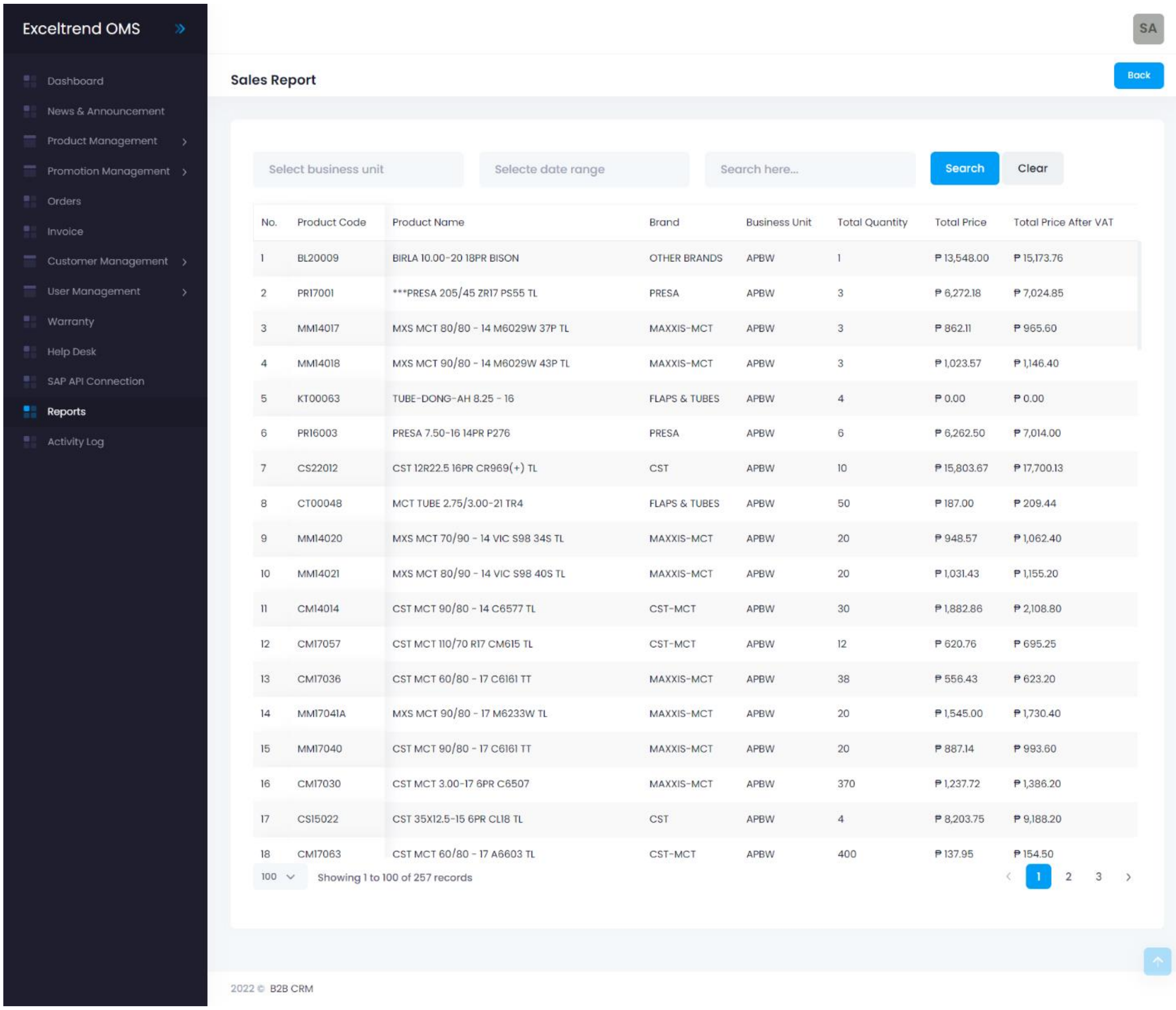
- Steps 1: - Click on Report module.



- Steps 2: - Click on sales report.



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

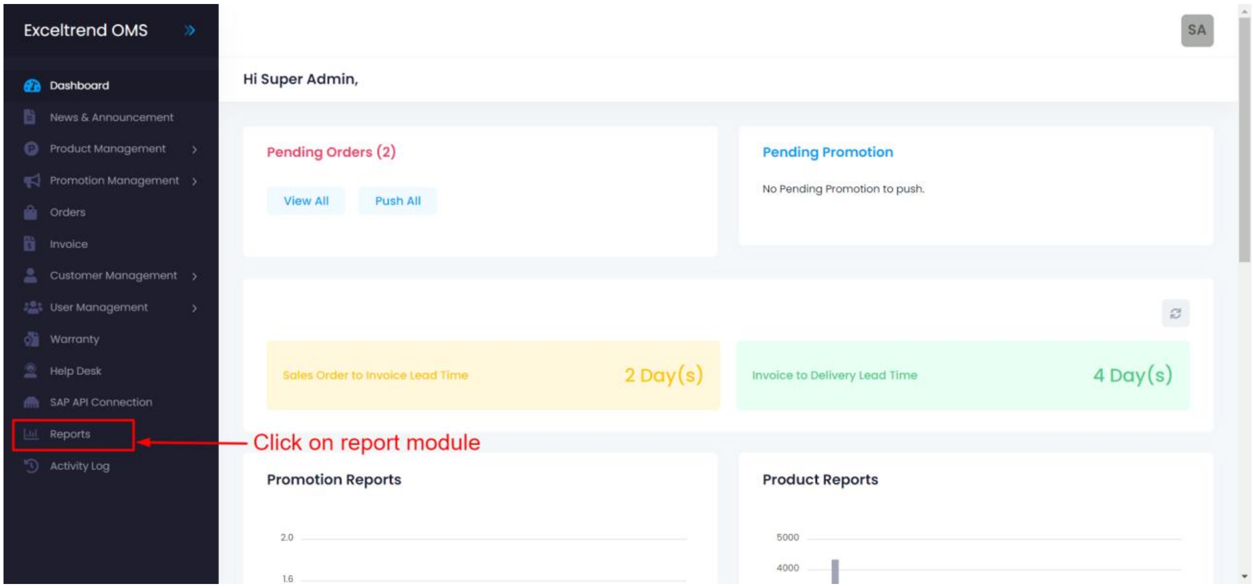


12.3 Sales Order Report: -

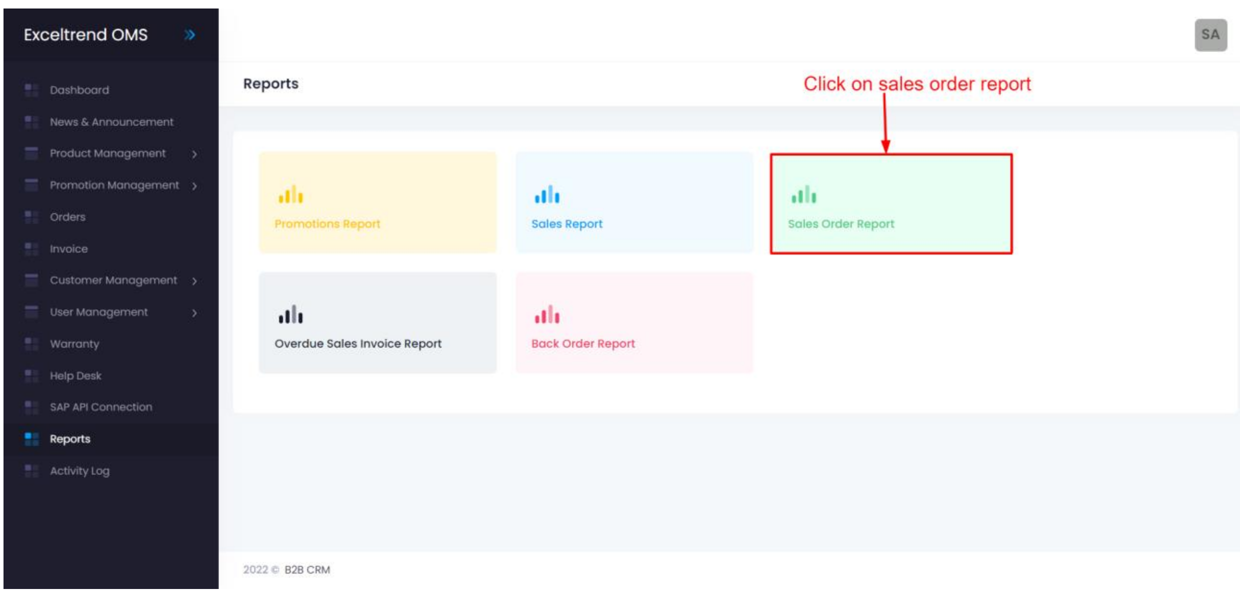
- Admin can see the sales report in particular report page.
- Admin can see the all sales details in this report.
- Admin can use the different-different filter and filter the data.
- Video Link: - https://www.screencast.com/t/ACH1WTp5ax

12.3.1 Steps: - How to see the sales report.

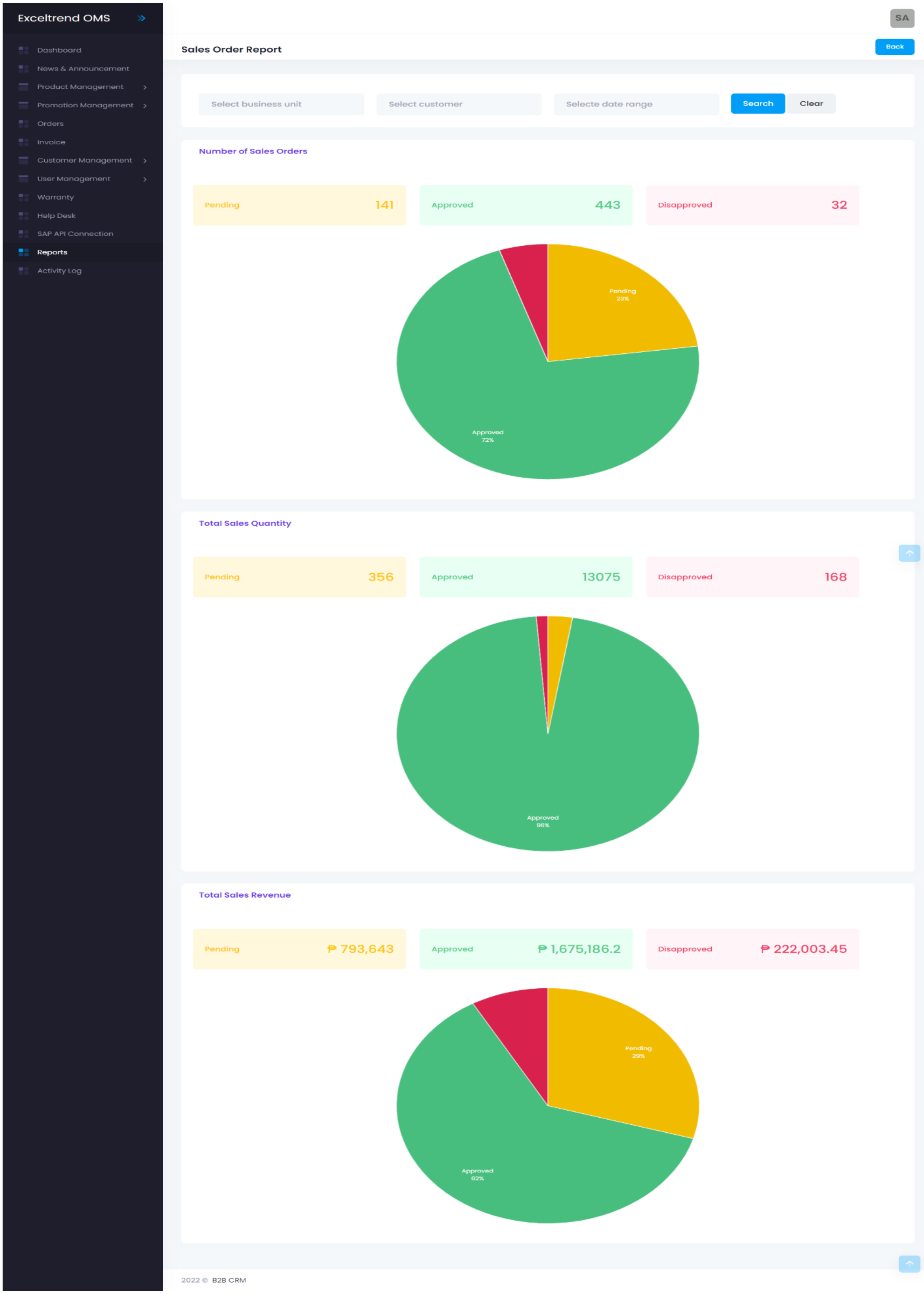
- Steps 1: - Click on Report module.



- Steps 2: - Click on sales order report.



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

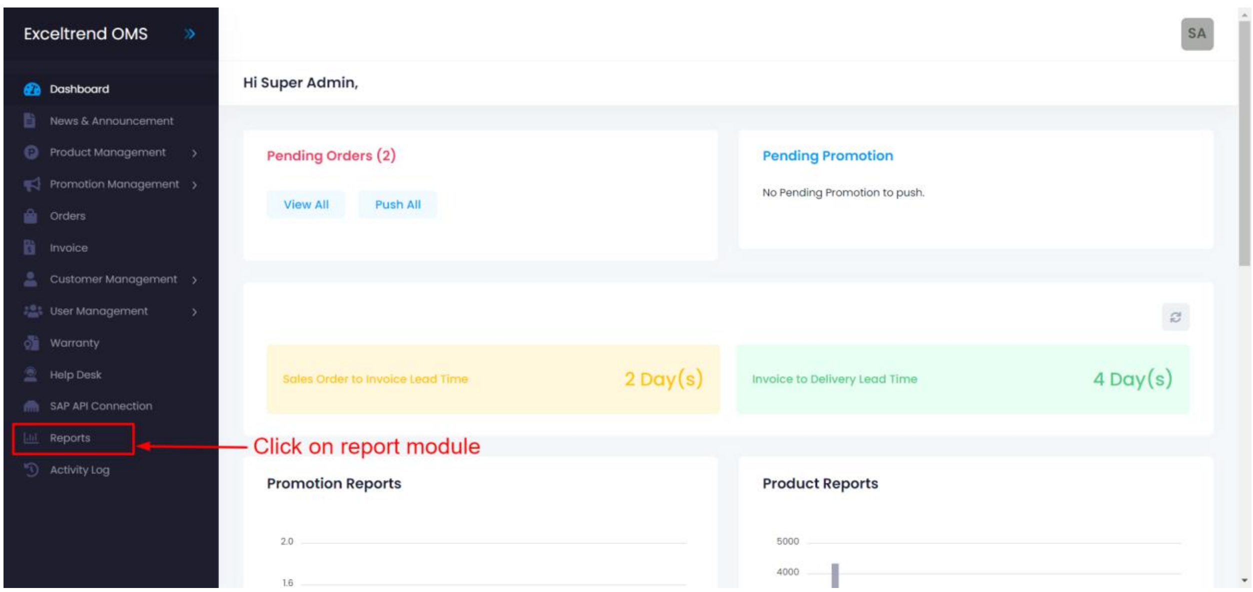

Exceltrend OMS
Dashboard
News & Announcement
Product Management
Promotion Management
Orders
Invoice
Customer Management
User Management
Warranty
Help Desk
SAP API Connection
Reports
Activity Log
SA
Sales Order Report
Back
Select business unit
Select customer
Selecte date range
Search
Clear
Number of Sales Orders
Pending 141
Approved 443
Disapproved 32
Pending 23%
Approved 72%
Total Sales Quantity
Pending 356
Approved 13075
Disapproved 168
Approved 96%
Total Sales Revenue
Pending ₱ 793,643
Approved ₱ 1,675,186.2
Disapproved ₱ 222,003.45
Pending 29%
Approved 62%
2022 © B2B CRM

12.4 Overdue Sales invoice Report: -

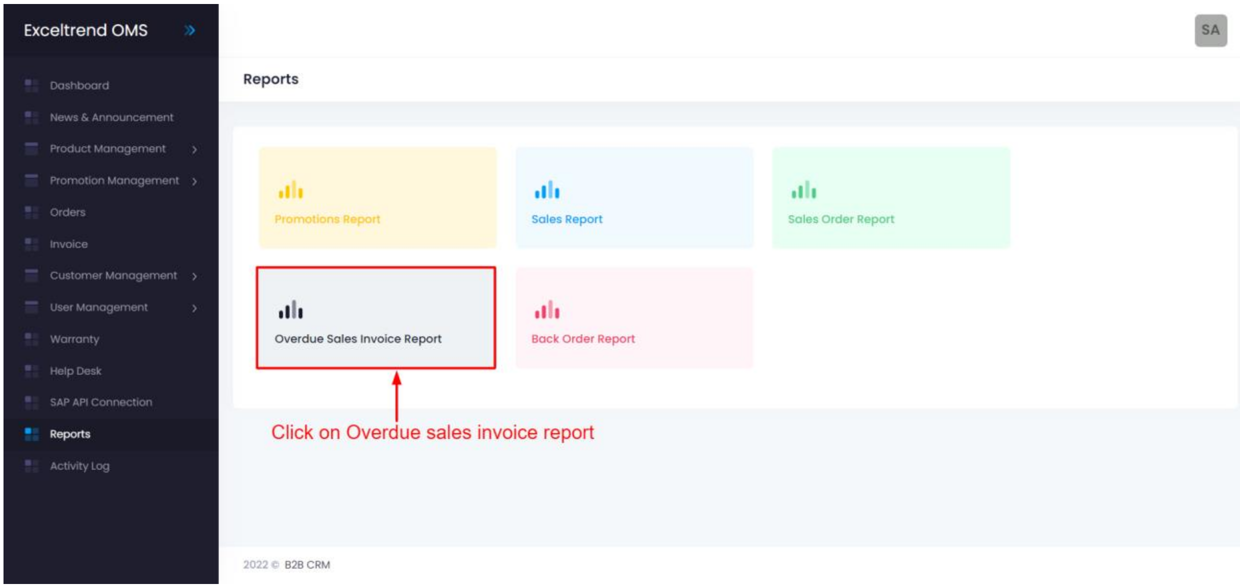
- Admin can see the overdue sales invoice report in particular report page.
- Admin can see the all overdue sales invoice details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - https://www.screencast.com/t/WV9UhKdIc7OI

12.4.1 Steps: - How to see the overdue sales invoice report.

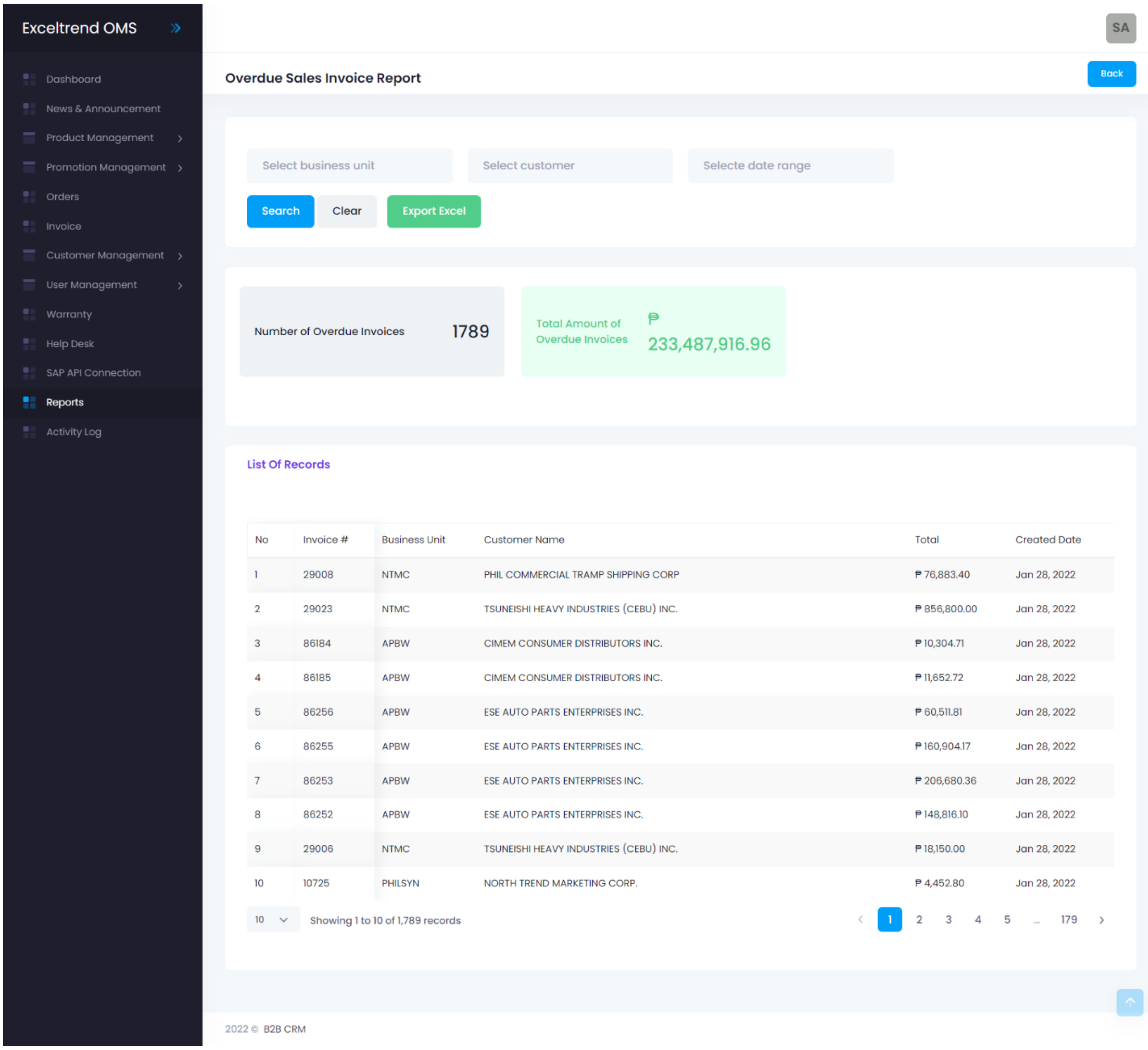
- Steps 1: - Click on Report module.



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



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

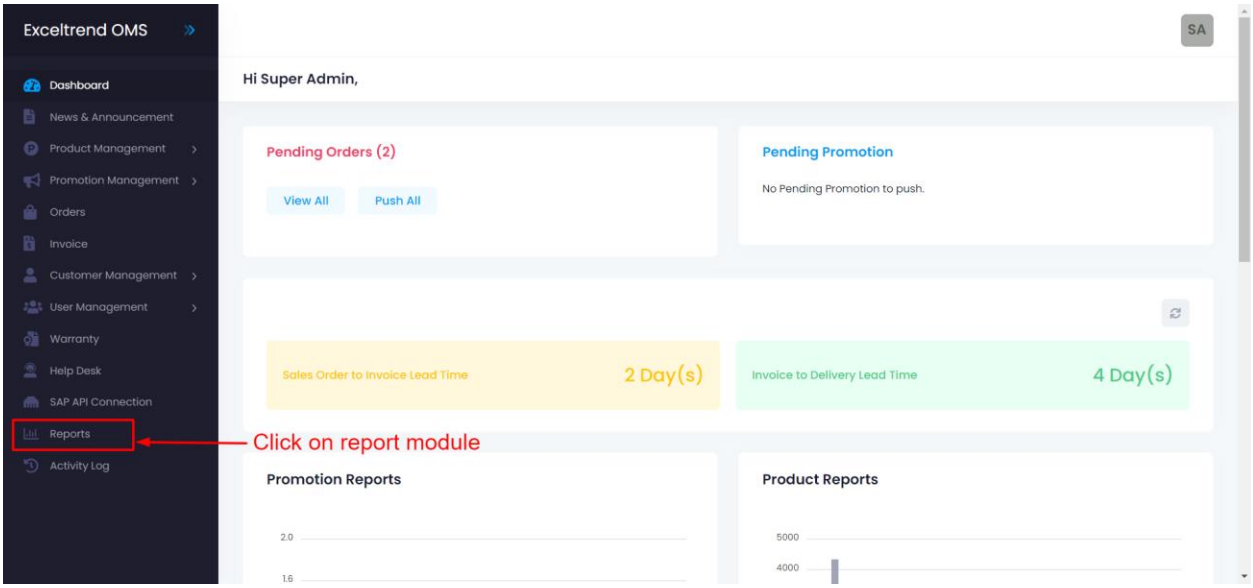


12.5 Back Order Report: -

- 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

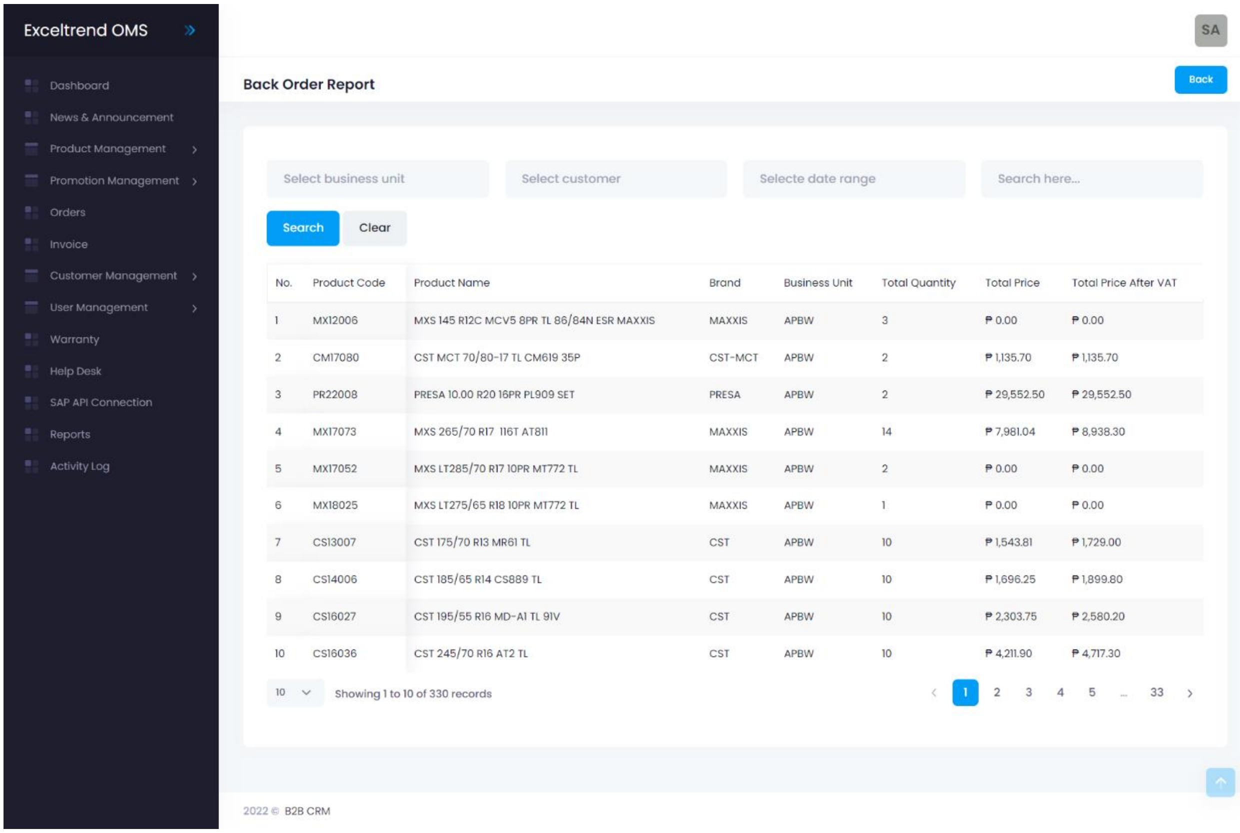
12.5.1 Steps: - How to see the back-order report.

- 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.

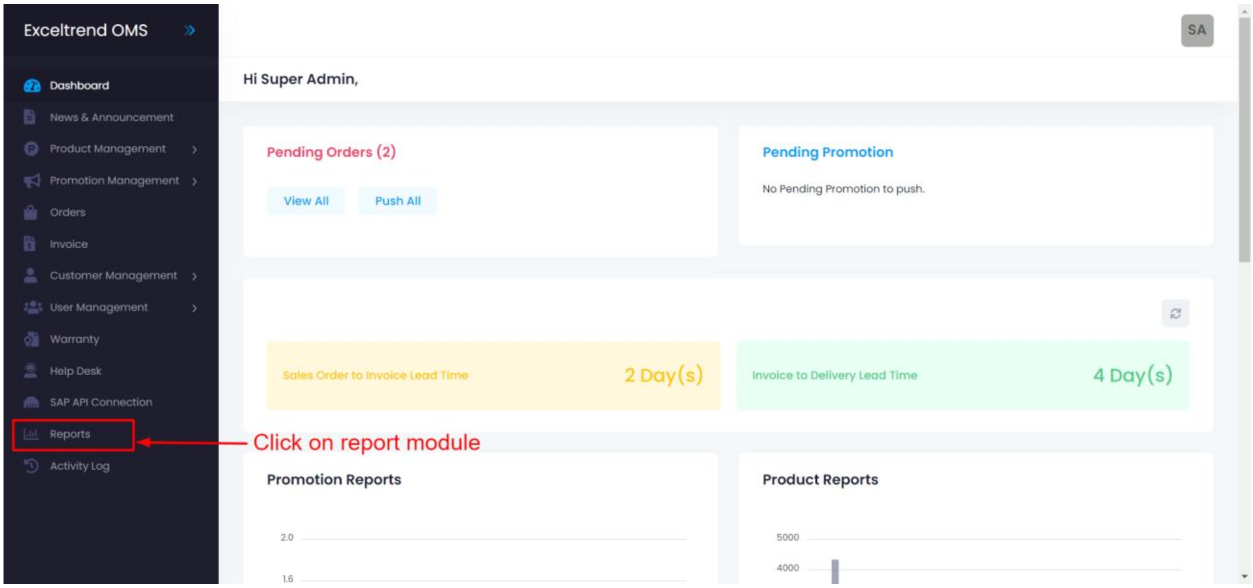


12.6 Product Sales Report: -

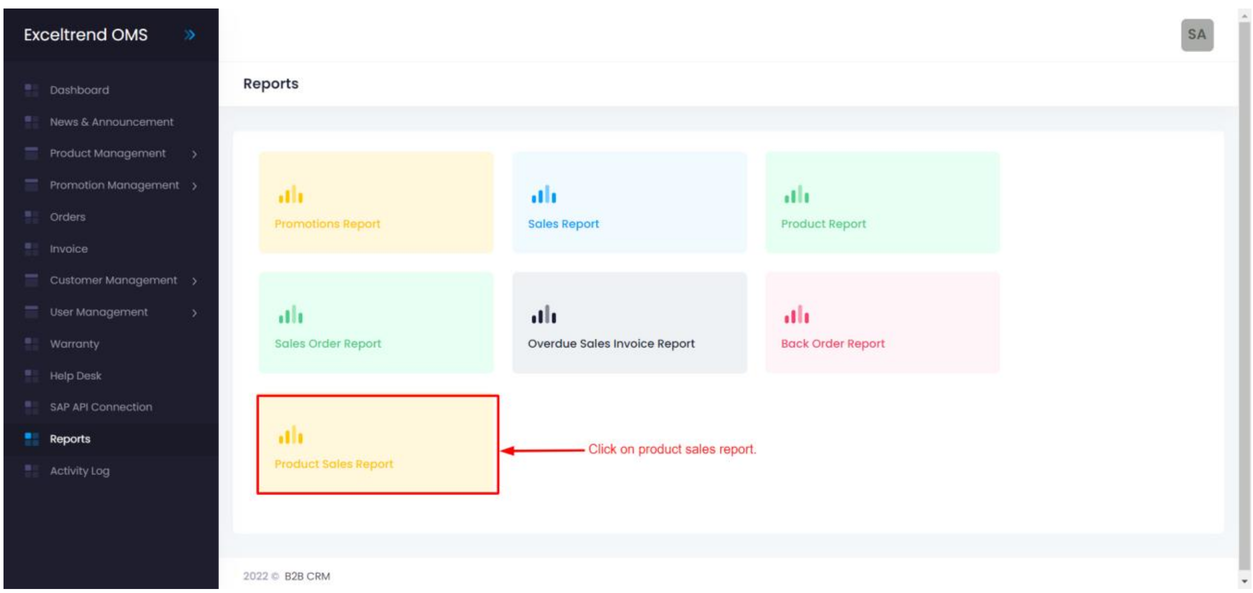
- Admin can see the product sales report in particular report page.
- Admin can see the all product sales details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - https://www.screencast.com/t/dWRArLri

12.6.1 Steps: - How to see the product sales report.

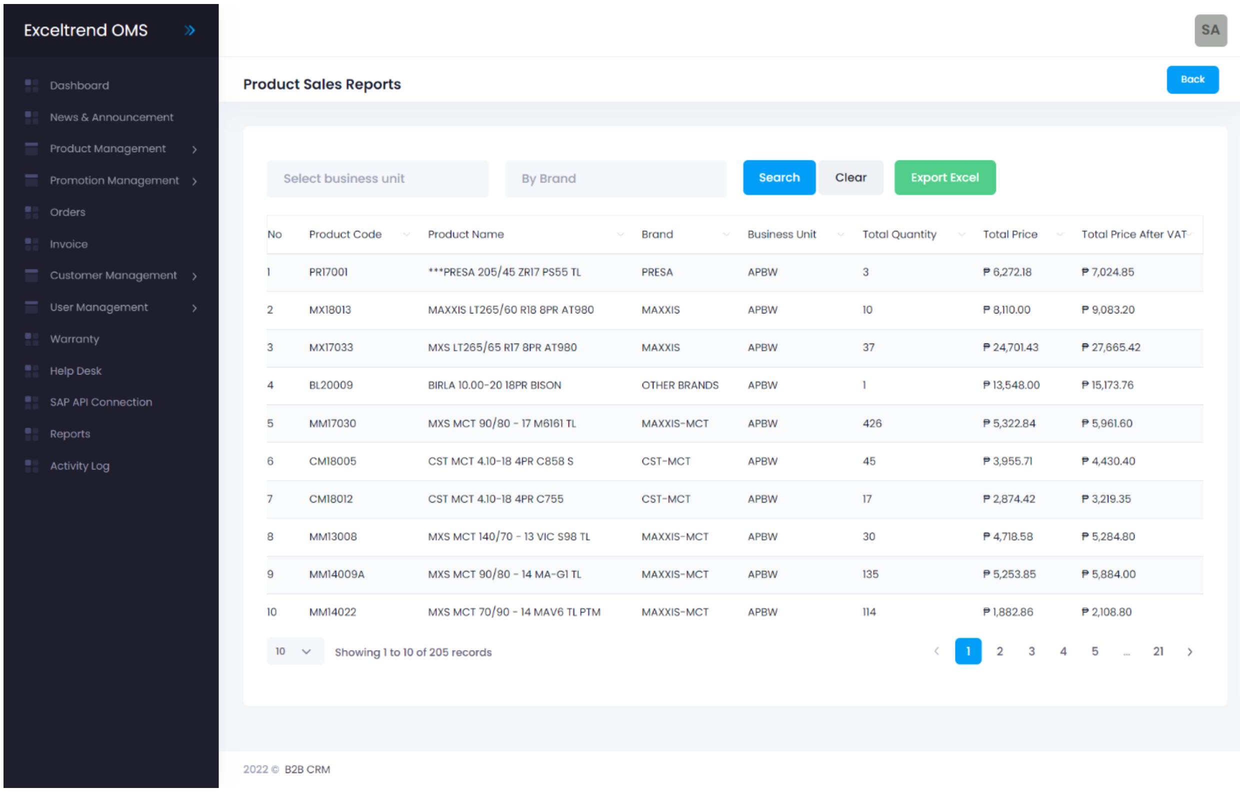
- Steps 1: - Click on report module.



- Steps 2: - Click on product sales report.



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

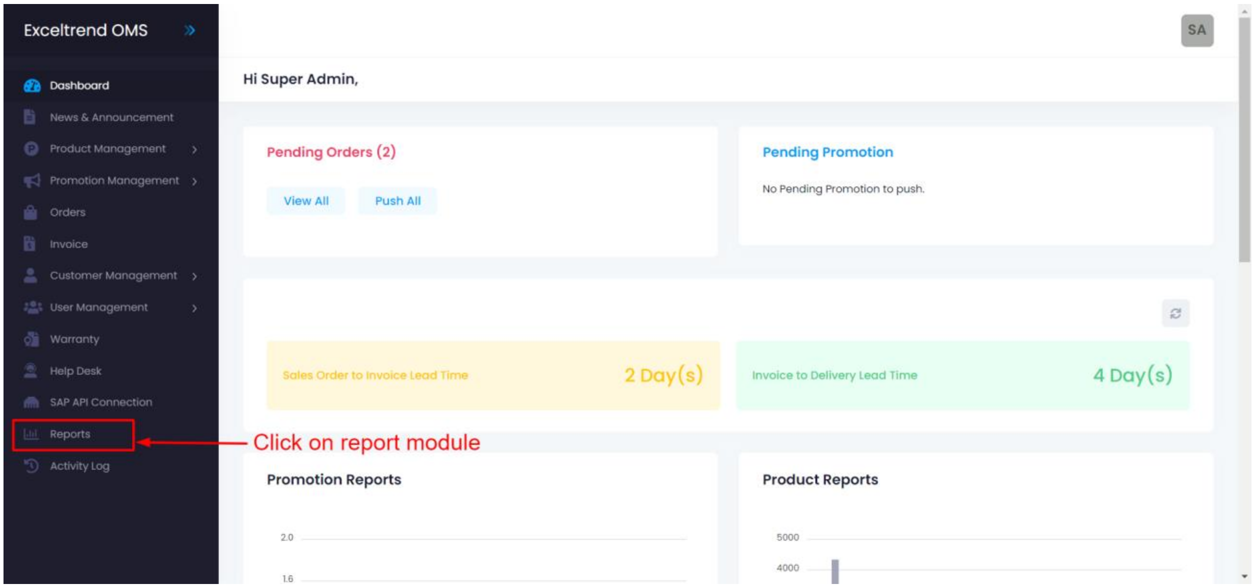


12.7 Product Report: -

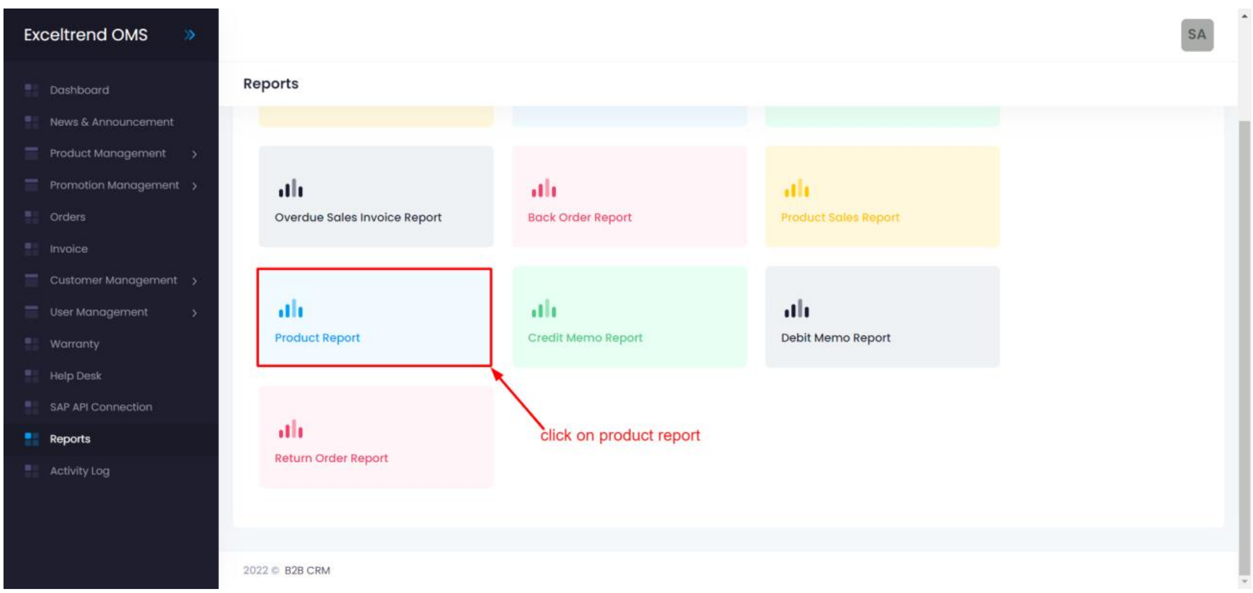
- Admin can see the product report in particular report page.
- Admin can see the all-product details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - https://www.screencast.com/t/UMgNHW8U

12.7.1 Steps: - How to see the Product Report.

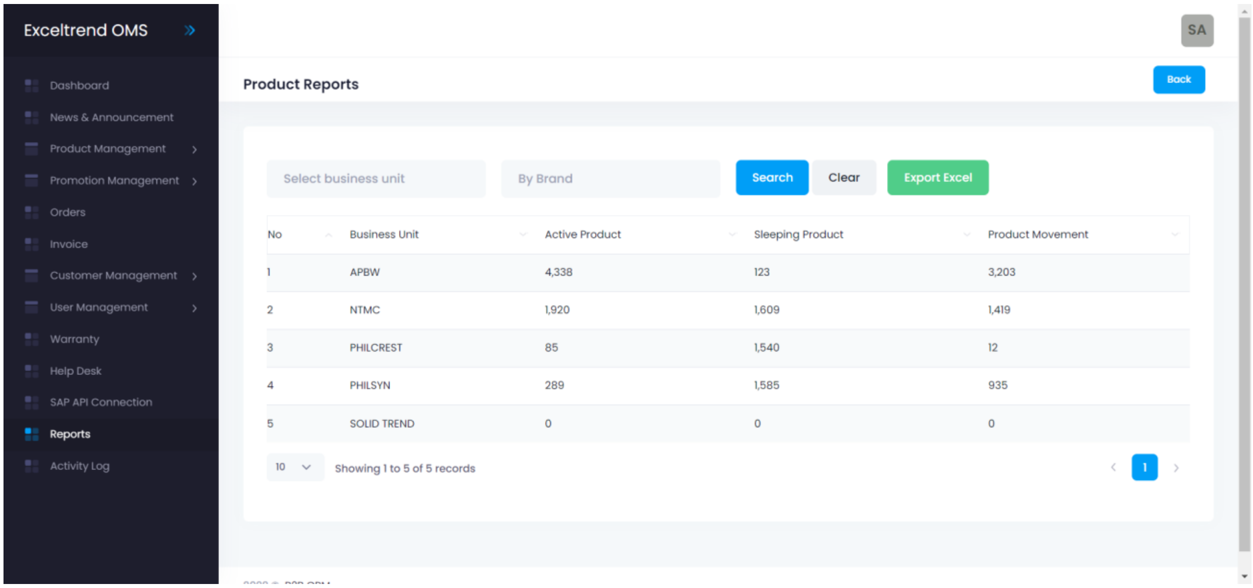
- Steps 1: - Click on Report Module.



- Steps 2: - Click on Product report.



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

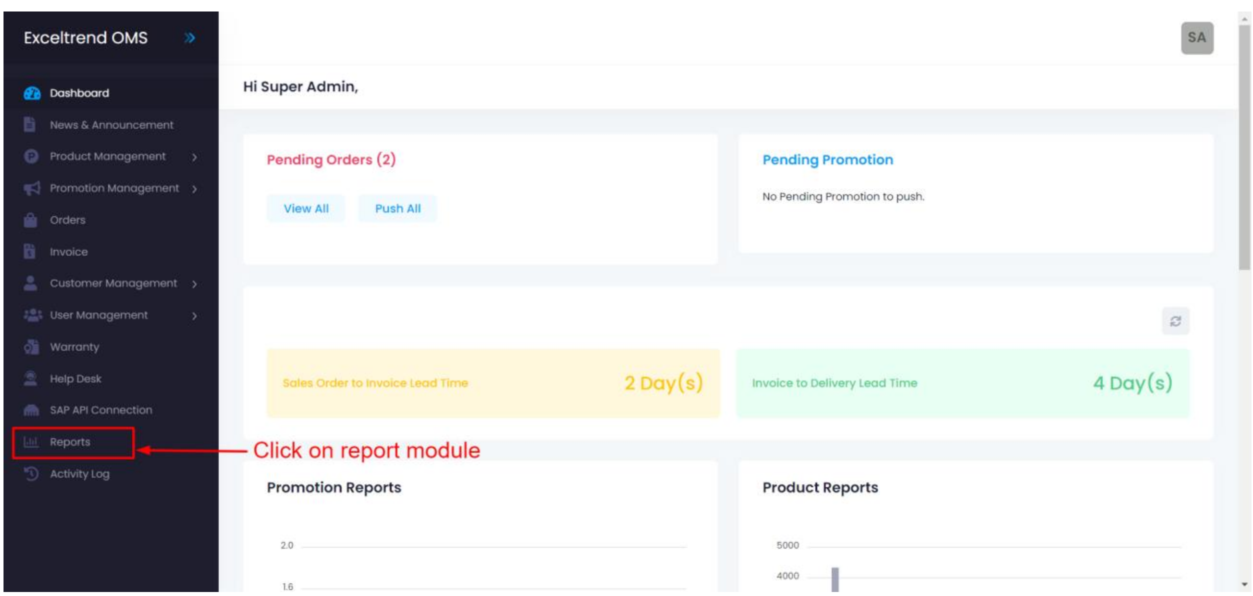


12.8 Credit Memo Report: -

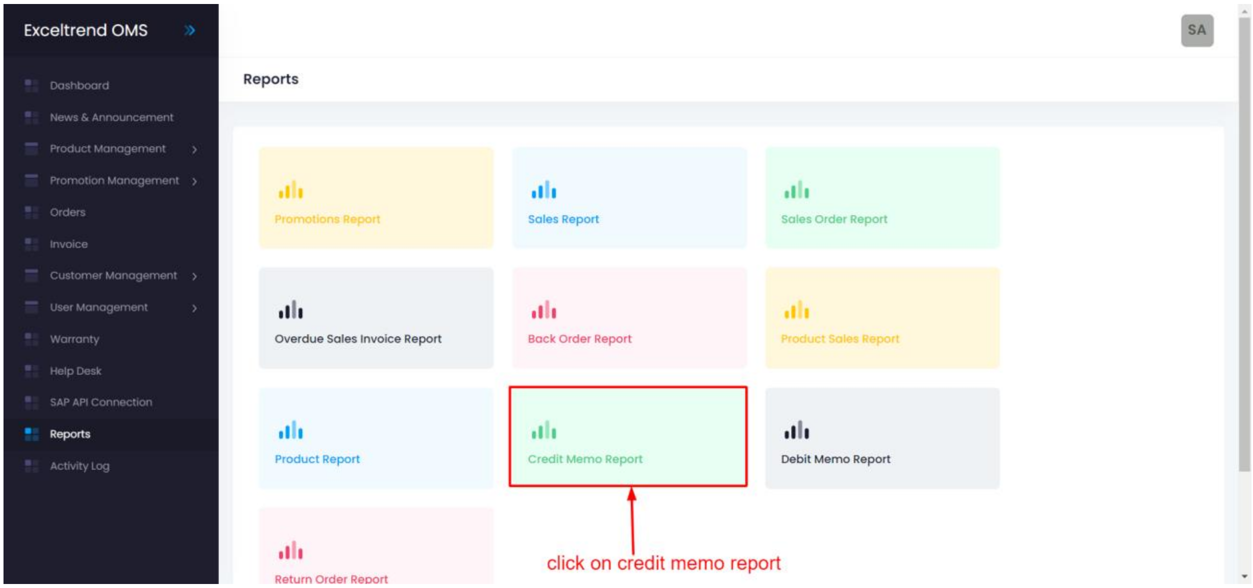
- Admin can see the credit memo report in particular report page.
- Admin can see the all-credit memo details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - https://www.screencast.com/t/KWjx590Q

12.8.1 Steps: - How to see the Credit Memo Report

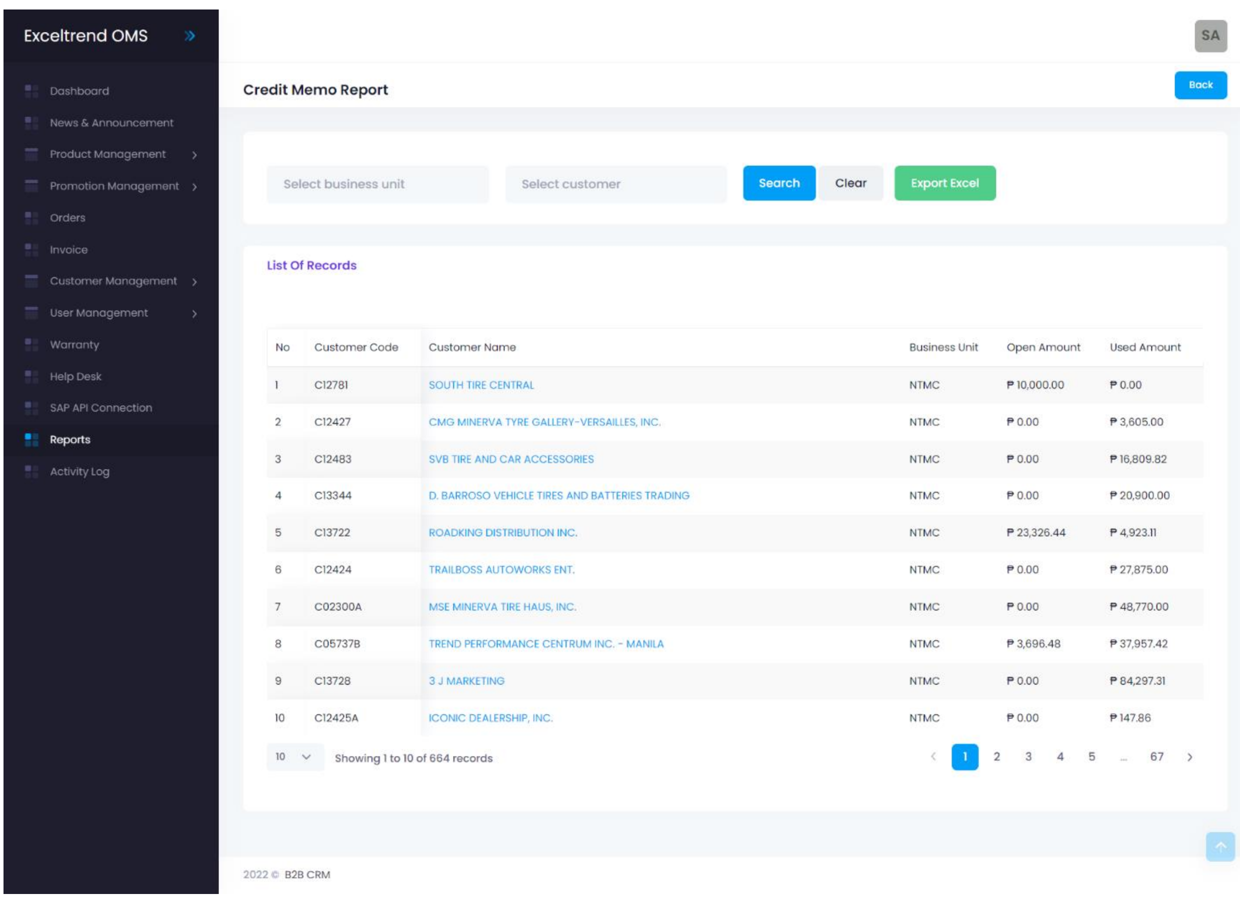
- Steps 1: - Click on Report Module.



- Steps 2: - Click on Credit memo report.



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

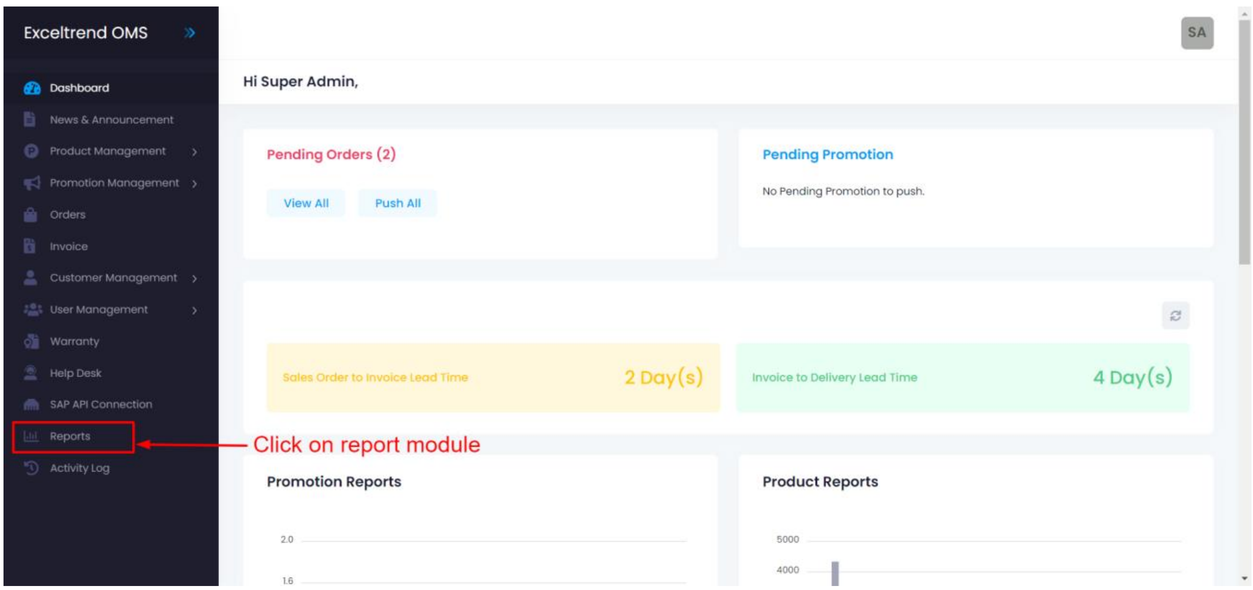


12.9 Debit Memo Report: -

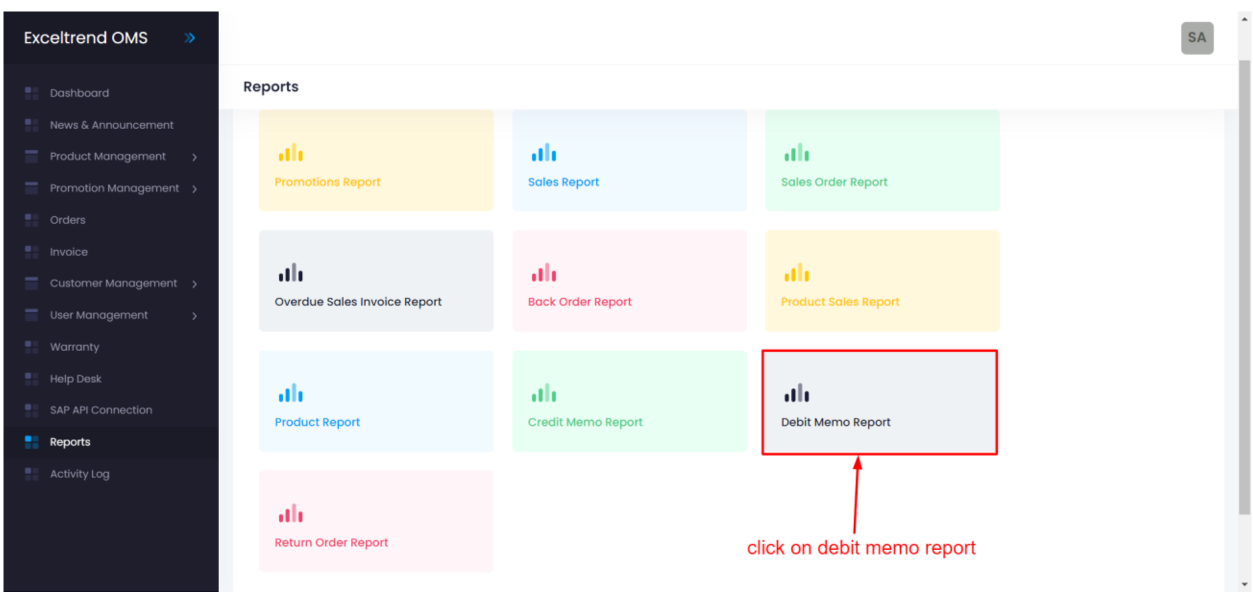
- Admin can see the product report in particular report page.
- Admin can see the all-product details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report.
- Video Link: - https://www.screencast.com/t/J9CCvKUI

12.9.1 Steps: - How to see the Product Report.

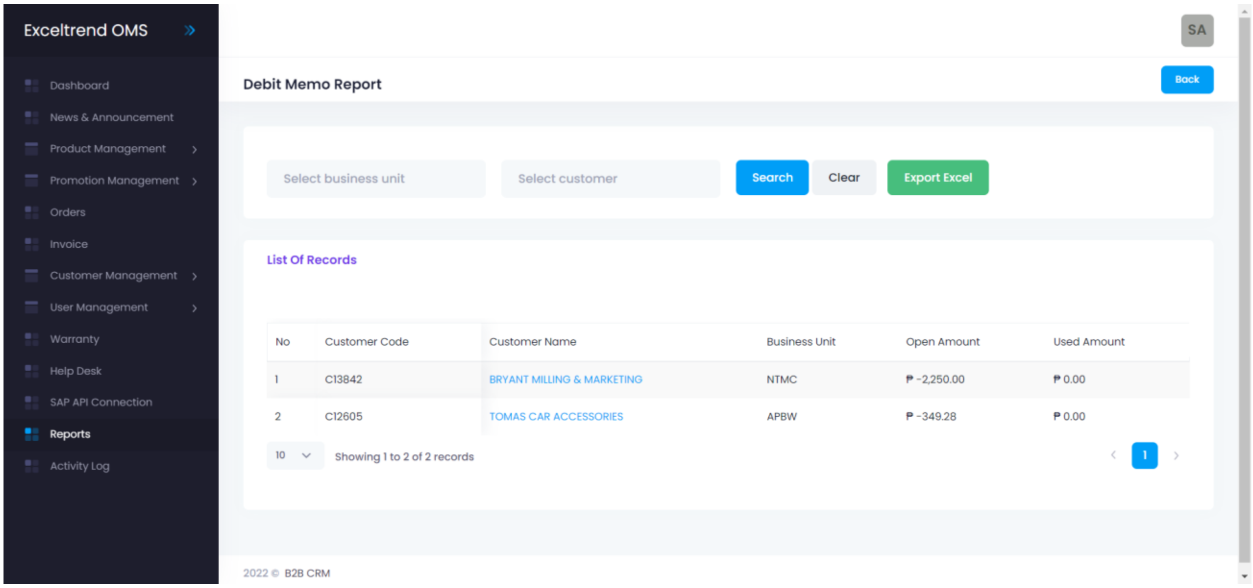
- Steps 1: - Click on Report Module.



- Steps 2: - Click on Debit Memo report.



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

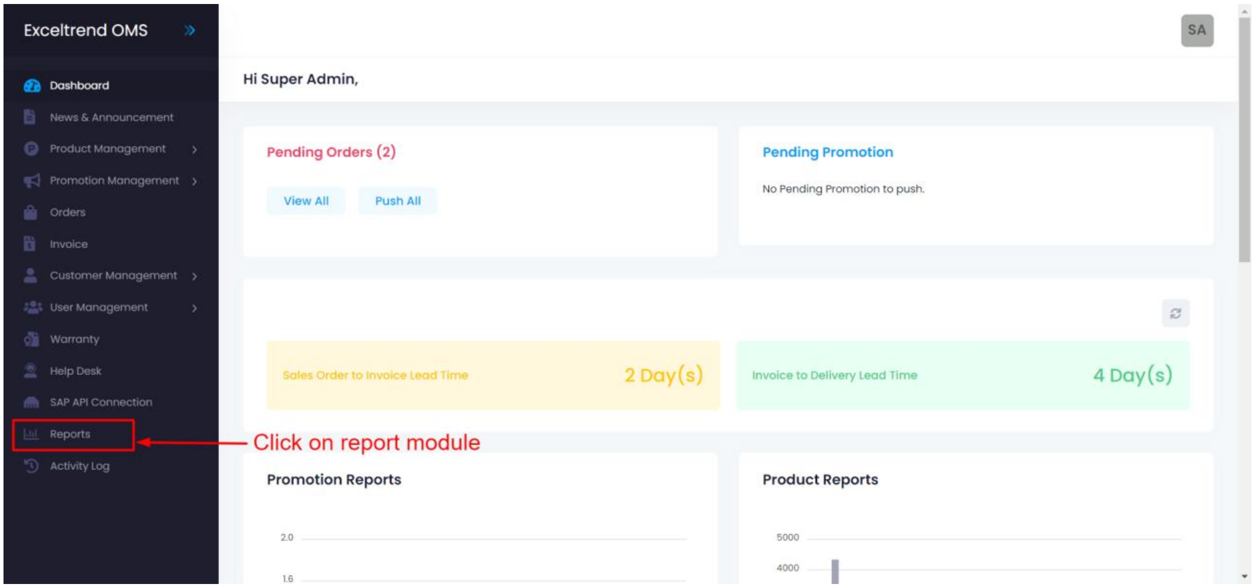


12.10 Return Order Report: -

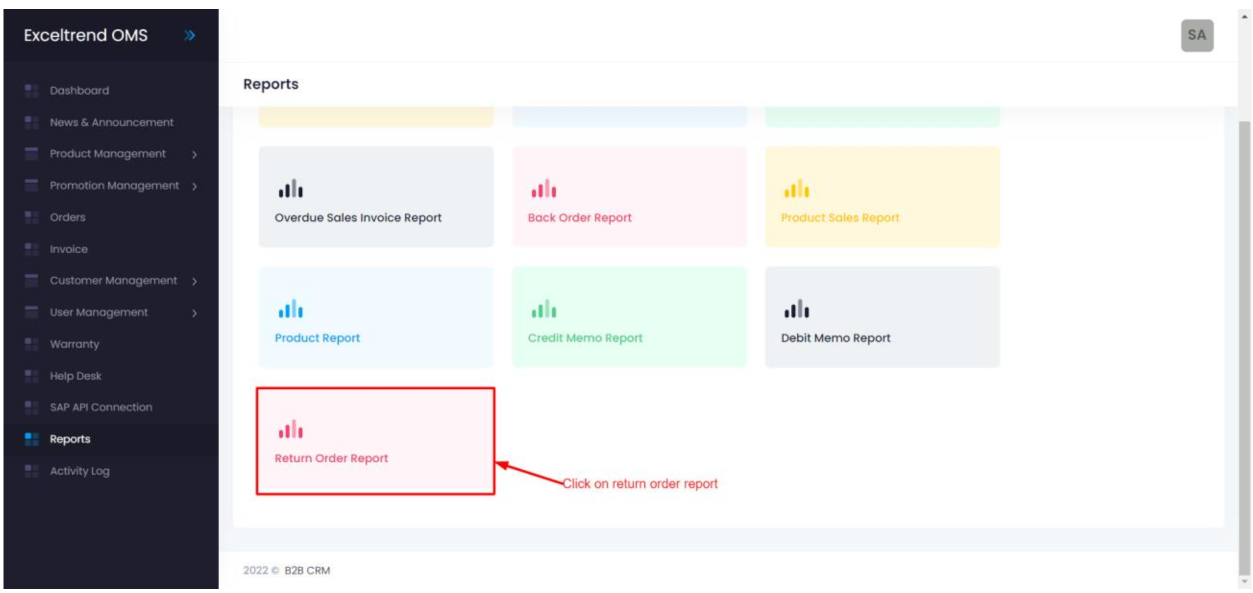
- Admin can see the return order report in particular report page.
- Admin can see the all-return order details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - https://www.screencast.com/t/QyFpAFP0

12.10.1 Steps: - How to see the Product Report.

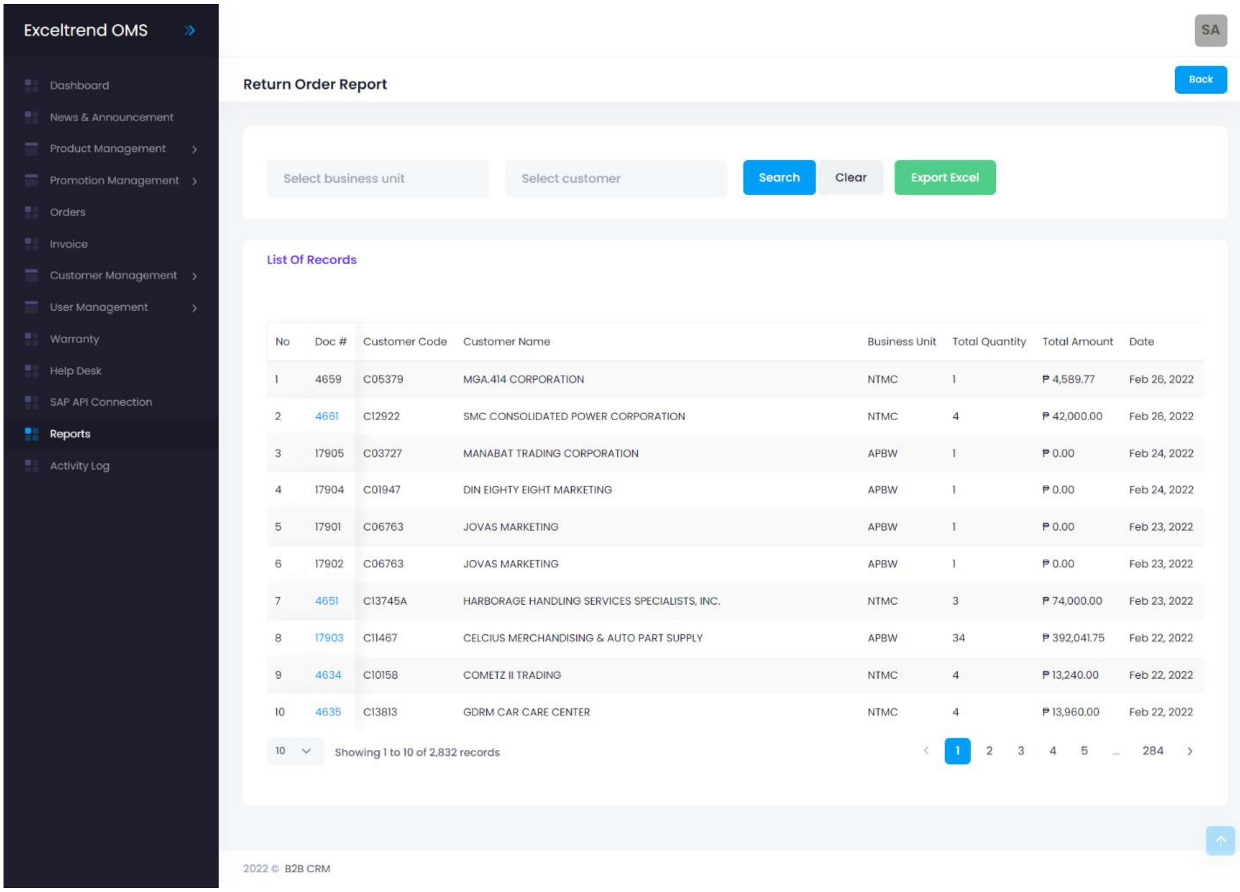
- Steps 1: - Click on Report Module.



- Steps 2: - Click on Return Order report.



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

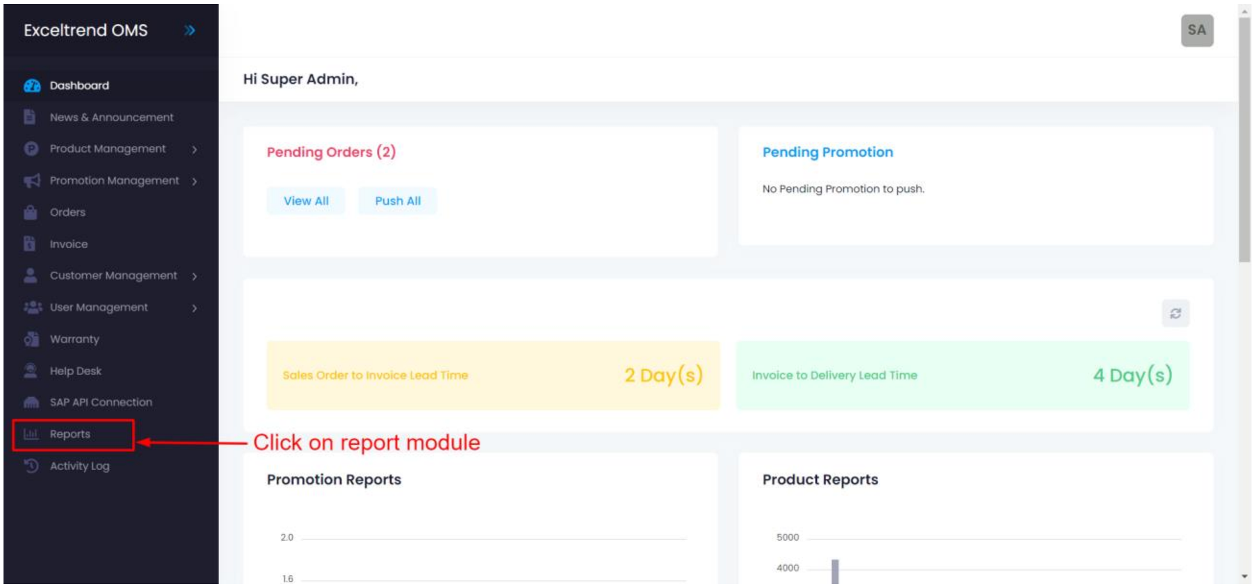


12.11 Sales Order to invoice Lead Time: -

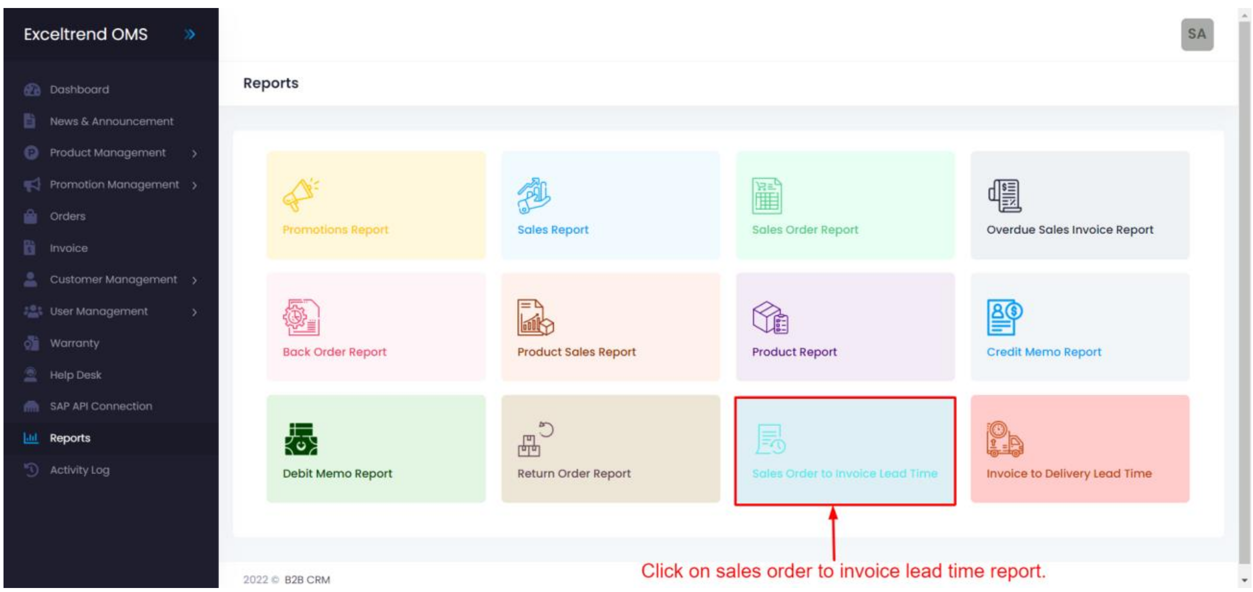
- Admin can see the sales order to invoice lead time report in particular report page.
- Admin can see the all sales order to invoice lead time details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - https://www.screencast.com/t/wmidSZp2NAQ

12.11.1 Steps: - How to see the Sales order to invoice lead time Report

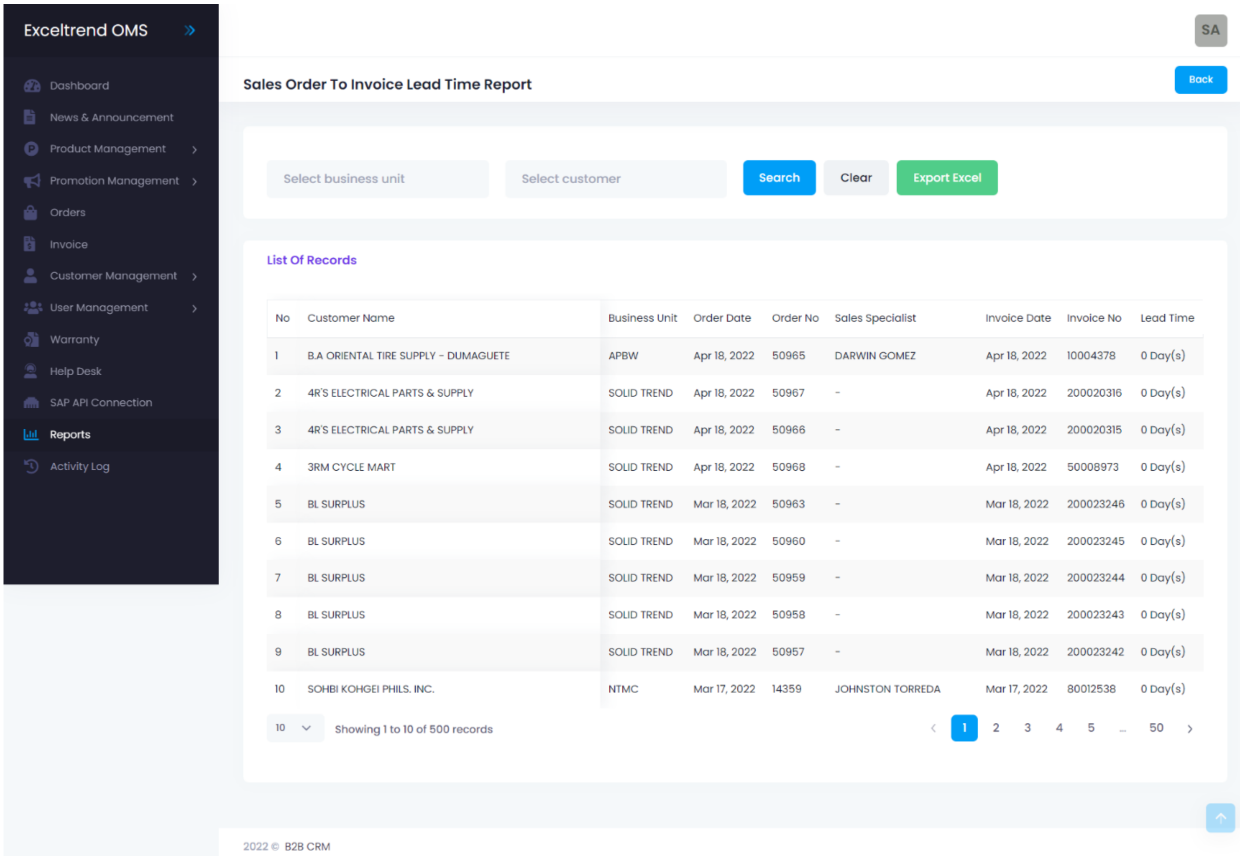
- Steps 1: - Click on report module.



- Steps 2: - Click on sales order to invoice lead time report.



- Steps 3: - Show all sales order to invoice lead time related data show in listing page.

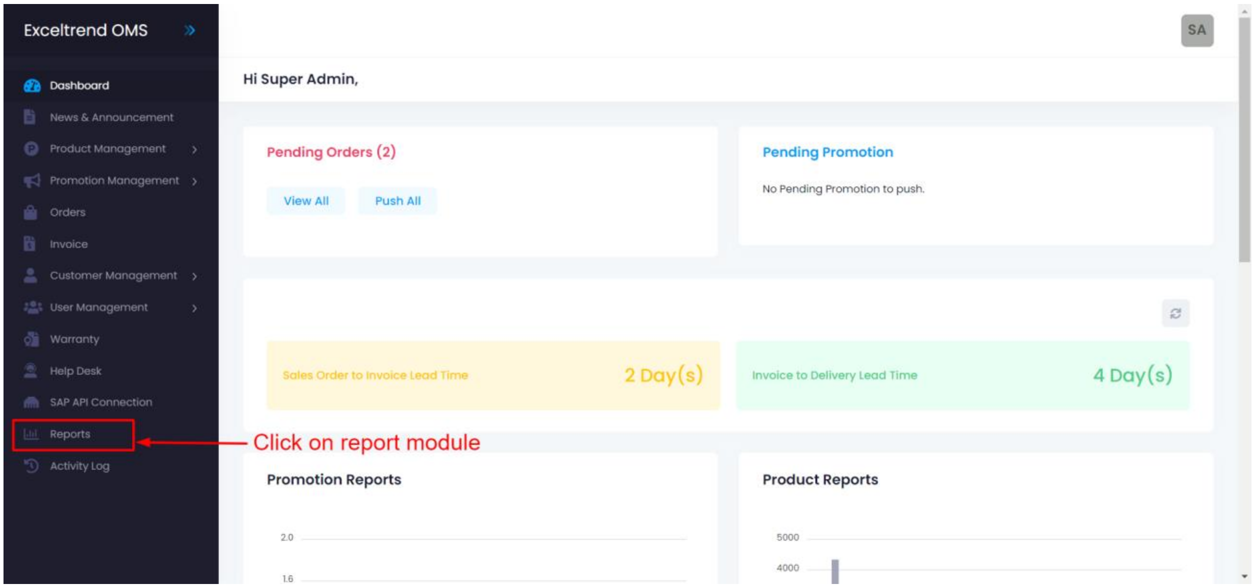


12.12 Invoice to Delivery Lead Time: -

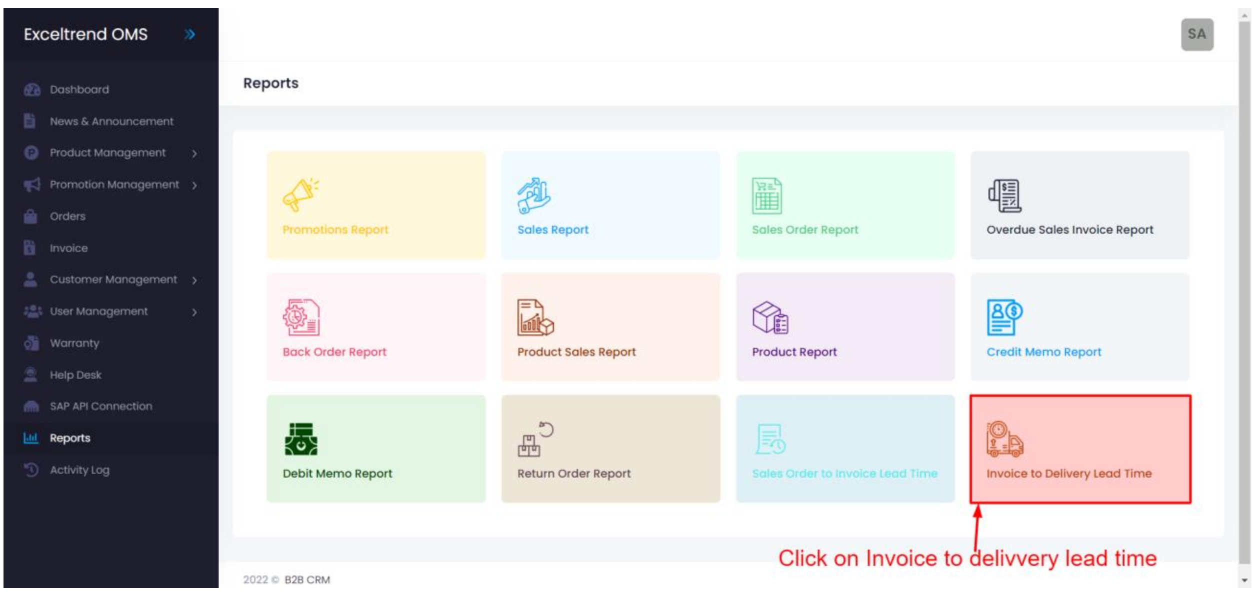
- Admin can see the invoice to delivery lead time report in particular report page.
- Admin can see the all sales order to invoice lead time details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - https://www.screencast.com/t/3zTkDXteoD

12.12.1 Steps: - How to see the Invoice to delivery lead time Report.

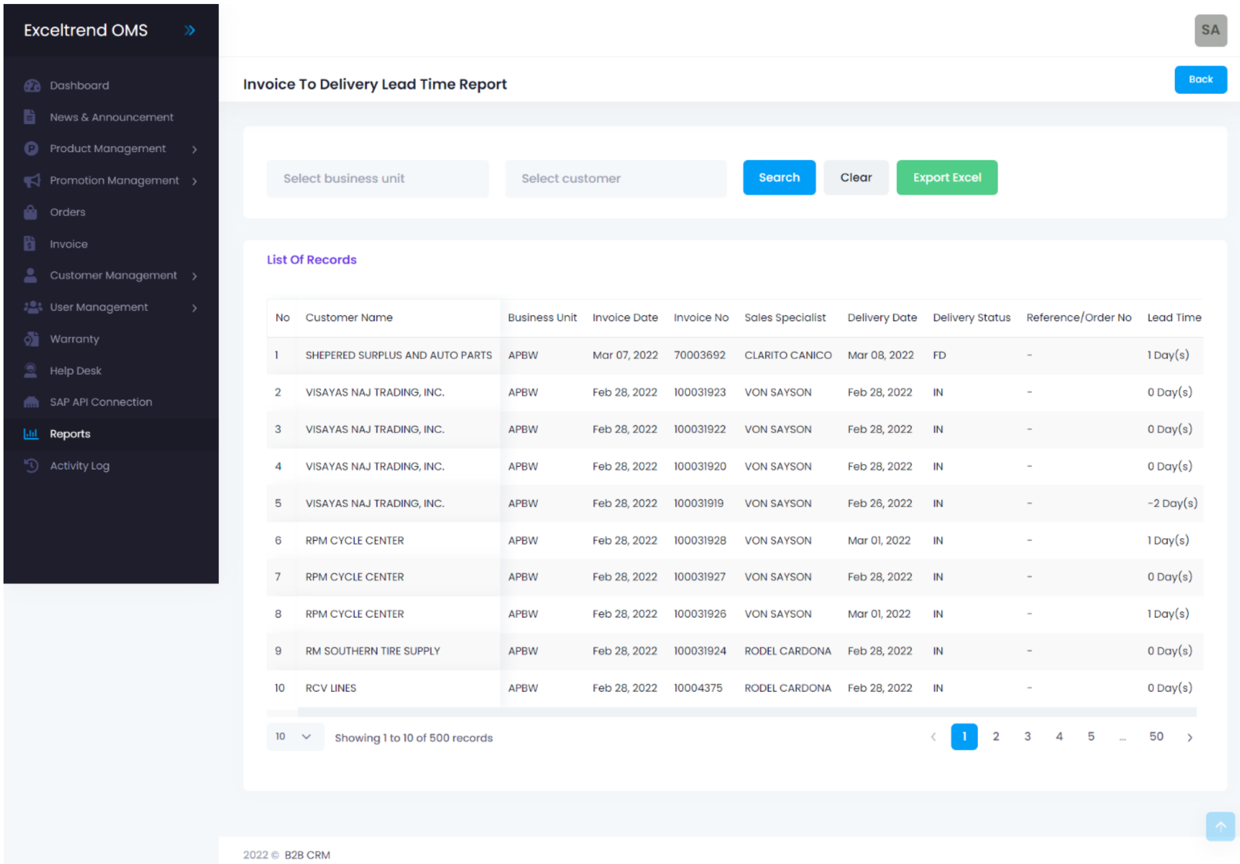
- Steps 1: - Click on report module.



- Steps 2: - Click on sales order to invoice lead time report.



- Steps 3: - Show all sales order to invoice lead time related data show in listing page.



13. 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