

OMS ERM System

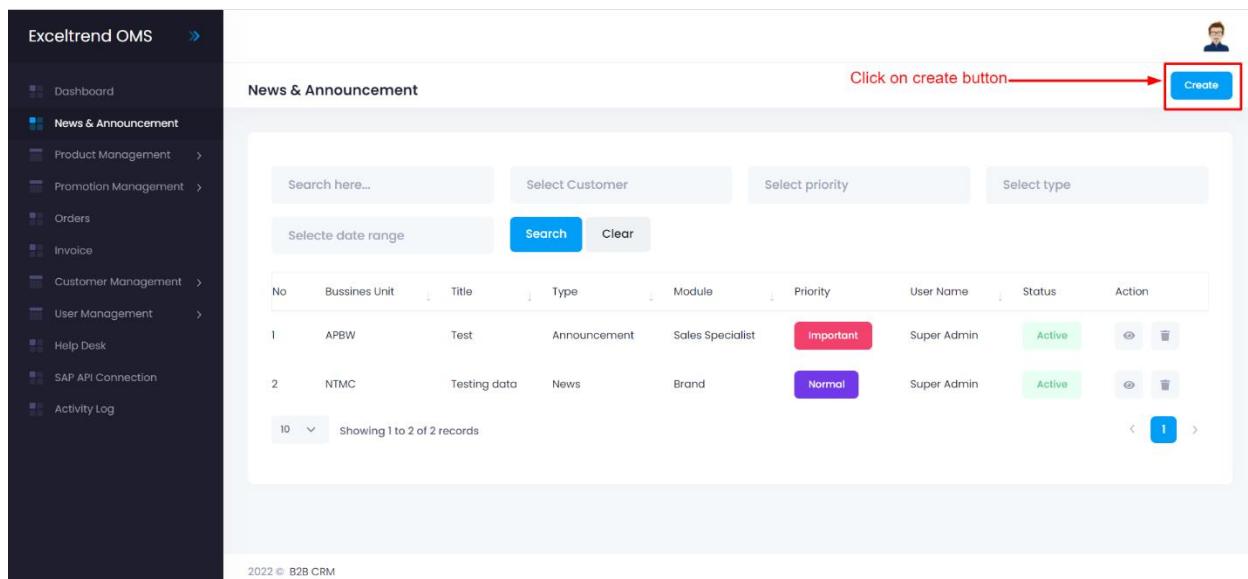
Project Link: - <http://demoo-manekserver.tk/north-trend-crm/public/login>

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.



The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with various menu items: Dashboard, News & Announcement (which is currently selected), Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Help Desk, SAP API Connection, and Activity Log. The main area is titled 'News & Announcement'. It features a search bar with fields for 'Search here...', 'Select Customer', 'Select priority', and 'Select type'. Below the search bar is a date range selector with 'Search' and 'Clear' buttons. The main content is a table listing two records. The columns are: No, Bussines Unit, Title, Type, Module, Priority, User Name, Status, and Action. Record 1: APBW, Test, Announcement, Sales Specialist, Important (red button). Record 2: NTMC, Testing data, News, Brand, Normal (purple button). The status for both is Active. At the bottom, it says 'Showing 1 to 2 of 2 records'. In the top right corner of the main area, there is a 'Create' button with a small user icon above it. A red arrow points from the text 'Click on create button' to this 'Create' button.

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

Excelltrend OMS

News & Announcement

Select the business unit, select priority, enter the title, and select the type

Add Details

Select Bussines Unit* Select Priority*

Title* Enter Title Select Type*

Message*

Back

- Step 3: - Enter the Message.

Excelltrend OMS

News & Announcement

Enter the Message

Title* Enter Title Select Type*

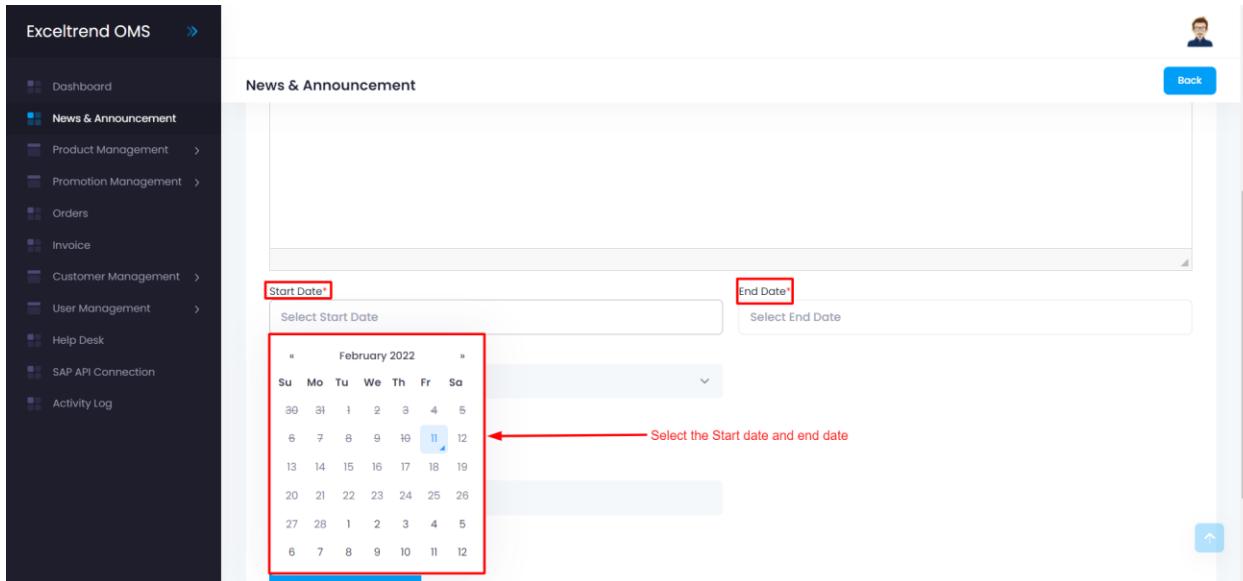
Message*

Start Date* Select Start Date End Date* Select End Date

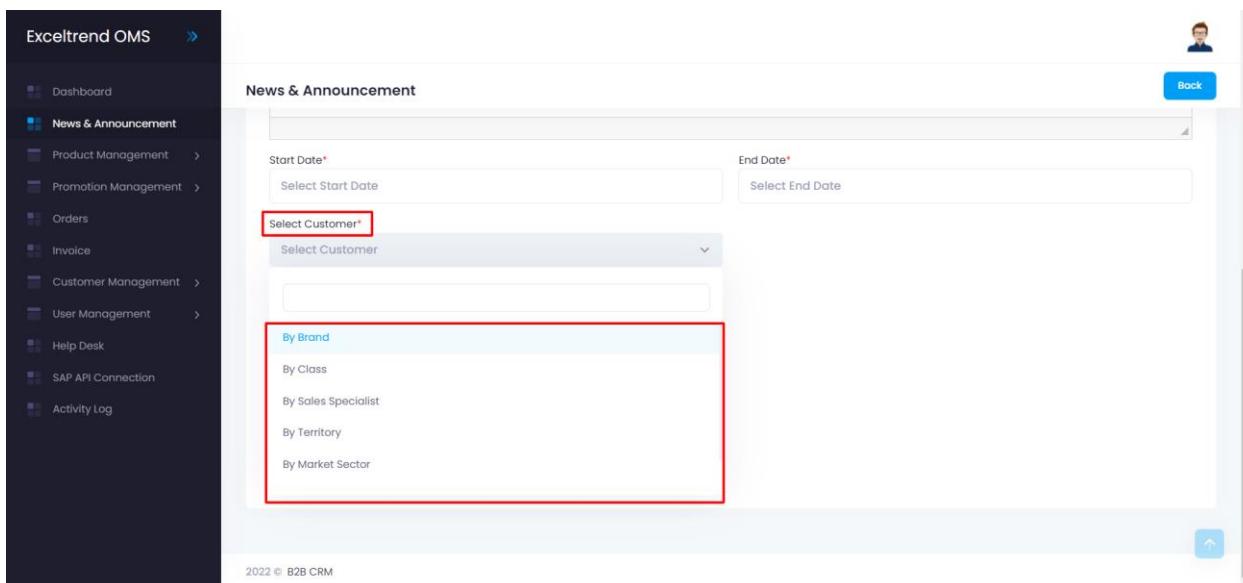
Select Customer* Select Customer

Back

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



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



Excelltrend OMS

News & Announcement

Start Date* Select Start Date

End Date* Select End Date

Select Customer* Select Customer Class*

By Class Select Customer Class

DEALER
DF-CST_PRESA
DF-MXS_PRESA
ENTRY
FLAGHIP

Upload Image and Documents

Choose File No file chosen

Add more

Save and Send Push

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This screenshot shows the 'News & Announcement' form in the Excelltrend OMS. It includes fields for start and end dates, a dropdown for selecting a customer, and a dropdown for selecting a customer class. A red box highlights the 'Select Customer Class' dropdown, which lists categories like DEALER, DF-CST_PRESA, DF-MXS_PRESA, ENTRY, and FLAGSHIP. Below these dropdowns is a section for uploading images and documents, with a 'Choose File' button and an 'Add more' button. At the bottom is a 'Save and Send Push' button.

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

Excelltrend OMS

News & Announcement

Start Date* Select Start Date

End Date* Select End Date

Select Customer* Select Customer Class*

By Class Select Customer Class

Choose File No file chosen

Add more

Save and Send Push

2022 © B2B CRM

This screenshot shows the same 'News & Announcement' form as the previous one, but with a red box highlighting the 'Choose File' button in the 'Upload Image and Documents' section. This indicates the step where a user should upload files.

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

Exceltrend OMS

News & Announcement

Start Date* Select Start Date

End Date* Select End Date

Select Customer* By Class

Select Customer Class*

Upload Image and Documents

Choose File No file chosen

Choose File No file chosen

Add more

Save and Send Push

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

Exceltrend OMS

News & Announcement

Create

Search here... Select Customer Select priority Select type

Select date range Search Clear

No	Bussines 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	

Showing 1 to 2 of 2 records

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

- Steps 1: - Click on eye icon button.

The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with various menu items: Dashboard, News & Announcement (which is selected and highlighted in blue), Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Help Desk, SAP API Connection, and Activity Log. The main content area is titled "News & Announcement". It features a search bar with fields for "Search here...", "Select Customer", "Select priority", and "Select type". Below the search bar is a date range selector with "Select date range", "Search", and "Clear" buttons. The main table displays two records:

No	Bussines 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	

At the bottom left of the table, it says "Showing 1 to 2 of 2 records". The bottom right corner of the table has navigation arrows: '<', '1' (highlighted in blue), and '>'. A red arrow points to the eye icon in the "Action" column for the first row. In the top right corner of the main area, there is a "Create" button and a user profile icon.

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

The screenshot shows the Exceltrend OMS software interface. On the left is a dark sidebar with a navigation menu:

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

The main content area has a header "Notification" with a "Back" button. Below it is a "Notification Details" section with the following fields:

Title	Test
Priority	Important
Notification Type	Announcement

Below this is a "Message" section containing a detailed description of "Lorem Ipsum".

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

At the bottom is a "Users" section showing one record:

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

At the very bottom of the main content area, there is a footer bar with the text "2022 © B2B CRM".

1.3 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 left sidebar includes options like 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 columns: No, Business Unit, Title, Type, Module, Priority, User Name, Status, and Action. Two records are listed: record 1 (APBW) has 'Important' priority and 'Active' status; record 2 (NTMC) has 'Normal' priority and 'Active' status. A red arrow points to the 'Active' button for record 2, which is highlighted in green.

- 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 the same 'News & Announcement' page after a status change. A modal dialog box is centered over the table, containing a yellow exclamation mark icon and the text "Are you sure want to change status?". It has two buttons: "Yes, change it!" (highlighted with a red arrow) and "Cancel". In the background, the table shows the second record now has an "Inactive" status. A red arrow also points to the "Inactive" status button for record 2.

- 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.

The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with various menu items: Dashboard, News & Announcement (which is selected), Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Help Desk, SAP API Connection, and Activity Log. The main area is titled "News & Announcement". It features a search bar with fields for "Search here...", "Select Customer", "Select priority", and "Select type". Below the search bar is a date range selector with "Search" and "Clear" buttons. The main content area displays a table with two rows of data. The columns are: No, Business Unit, Title, Type, Module, Priority, User Name, Status, and Action. The first row has a Business Unit of APBW, Title of Test, Type of Announcement, Module of Sales Specialist, Priority of Important, User Name of Super Admin, Status of Inactive, and Action buttons. The second row has a Business Unit of NTMC, Title of Testing data, Type of News, Module of Brand, Priority of Normal, User Name of Super Admin, Status of Active, and Action buttons. At the bottom of the table, it says "Showing 1 to 2 of 2 records". A red arrow points to the trash icon in the Action column of the second row.

- 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 Exceltrend OMS interface as the previous one, but with a modal dialog box overlaid. The dialog has a yellow exclamation mark icon at the top. The text inside reads "Are you sure?" followed by "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 border) and "Cancel". Below the dialog, a red arrow points to the "Yes, delete it!" button. The background of the main screen shows the same list of announcements as the first screenshot.

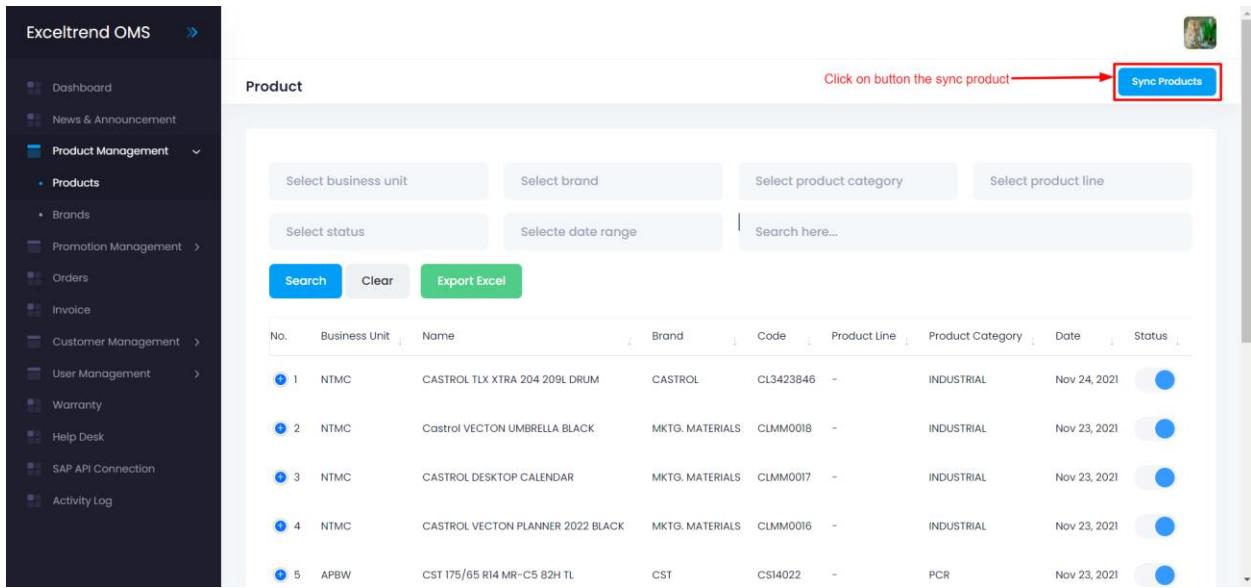
2. Product Management Module: -

- 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.



The screenshot shows the Exceltrend OMS application interface. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management (selected), Orders, Invoice, etc. The main area is titled 'Product' and contains a table of products. At the top right of the main area, there is a blue button labeled 'Sync Products' with a red box and an arrow pointing to it. The table has columns for No., Business Unit, Name, Brand, Code, Product Line, Product Category, Date, and Status. There are five rows of data in the table.

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 175/65 R14 MR-C5 82H TL	CST	CS14022	-	PCR	Nov 23, 2021	<input checked="" type="radio"/>

- 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 Exceltrend OMS Product Management screen. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management (selected), Products, Brands, Promotion Management, 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 of products. A modal dialog box is centered over the table, displaying a warning icon and the text: 'Are you sure you want to Sync Products? 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: 'Yes, do it!' (highlighted with a red box) and 'Cancel'. Below the dialog, a note says '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	Active
2	NTMC	Castrol VECTON UMBRELLA BLACK	MKTG. MATERIALS	CLMM0018	-	INDUSTRIAL	Nov 23, 2021	Active
3	NTMC	CASTROL DESKTOP CALENDAR	MKTG. MATERIALS	CLMM0017	-	INDUSTRIAL	Nov 23, 2021	Active
4	NTMC	CASTROL VECTON PLANNER 2022 BLACK	MKTG. MATERIALS	CLMM0016	-	INDUSTRIAL	Nov 23, 2021	Active
5	APBW	CST 175/65 R14 MR-C5 82H TL	CST	CS14022	-	PCR	Nov 23, 2021	Active
6	APBW	CST 175/65 R14 MR-C5 82H TL	CST	CS14021	-	PCR	Nov 23, 2021	Active

2.2 Steps: - How to edit the product.

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

This screenshot is similar to the one above, showing the Product Management screen. A red arrow points to the small blue circular icon with a white plus sign (+) located to the left of the first product row in the table. This icon is used to add new 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	Active
2	NTMC	Castrol VECTON UMBRELLA BLACK	MKTG. MATERIALS	CLMM0018	-	INDUSTRIAL	Nov 23, 2021	Active
3	NTMC	CASTROL DESKTOP CALENDAR	MKTG. MATERIALS	CLMM0017	-	INDUSTRIAL	Nov 23, 2021	Active
4	NTMC	CASTROL VECTON PLANNER 2022 BLACK	MKTG. MATERIALS	CLMM0016	-	INDUSTRIAL	Nov 23, 2021	Active
5	APBW	CST 175/65 R14 MR-C5 82H TL	CST	CS14022	-	PCR	Nov 23, 2021	Active
6	APBW	CST 175/65 R14 MR-C5 82H TL	CST	CS14021	-	PCR	Nov 23, 2021	Active

- Steps 2: - Click on Pencil icon.

The screenshot shows the Exceltrend OMS Product Management interface. On the left, there is a navigation sidebar with various menu items like Dashboard, News & Announcement, Product Management (selected), Promotion Management, 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 of products. The table has columns for No., Business Unit, Name, Brand, Code, Product Line, Product Category, Date, and Status. The first row is highlighted with a red circle icon. An annotation with a red box and a red arrow points to the 'Action' column of the first row, specifically to the pencil icon. A tooltip says 'Click on Pencil icon'. There are also buttons for Search, Clear, and Export Excel at the top of the table.

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	Active
2	NTMC	Castrol VECTON UMBRELLA BLACK	MKTG. MATERIALS	CLMM0018	-	INDUSTRIAL	Nov 23, 2021	Active
3	NTMC	CASTROL DESKTOP CALENDAR	MKTG. MATERIALS	CLMM0017	-	INDUSTRIAL	Nov 23, 2021	Active
4	NTMC	CASTROL VECTON PLANNER 2022 BLACK	MKTG. MATERIALS	CLMM0016	-	INDUSTRIAL	Nov 23, 2021	Active
5	APBW	CST 175/65 R14 MR-C5 82H TL	CST	CS14022	-	PCR	Nov 23, 2021	Active

- 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

Test

Features

Test

Advantages & Benefits

Test

Sell Sheets

Test

Upload Product Image*

Choose File No file chosen

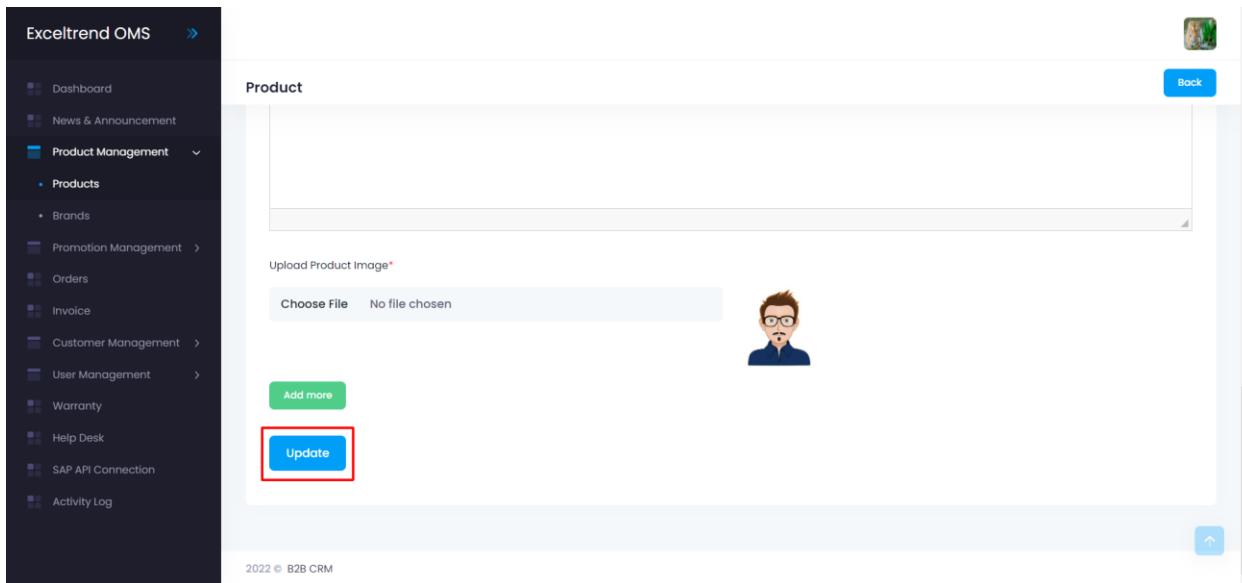
Add more

Update



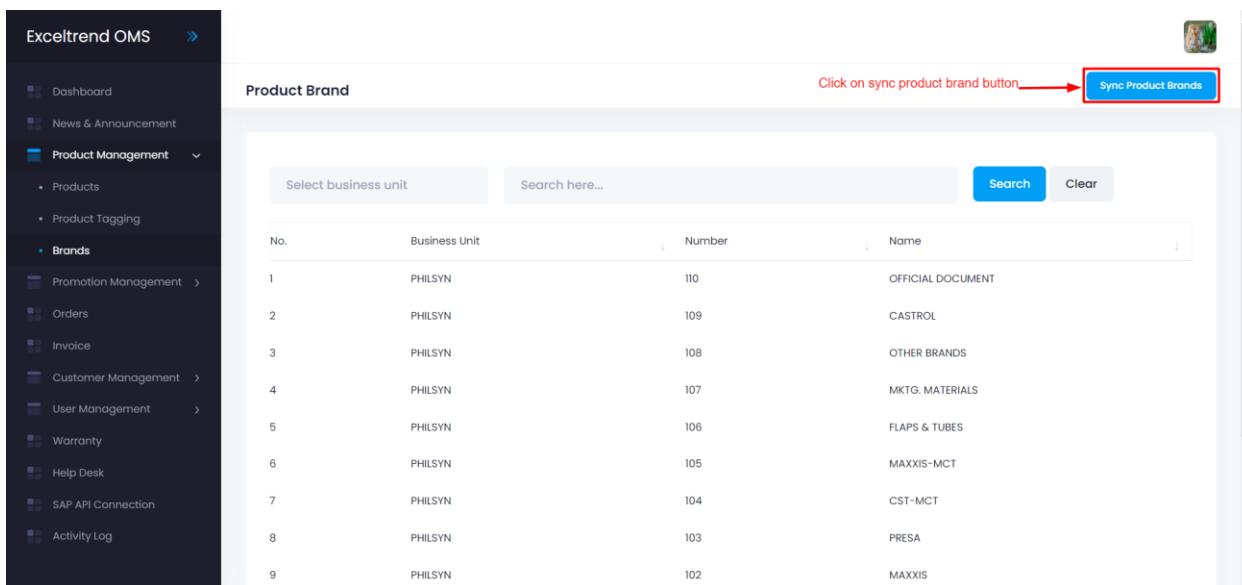
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- Steps 4: -Click on Upload button.

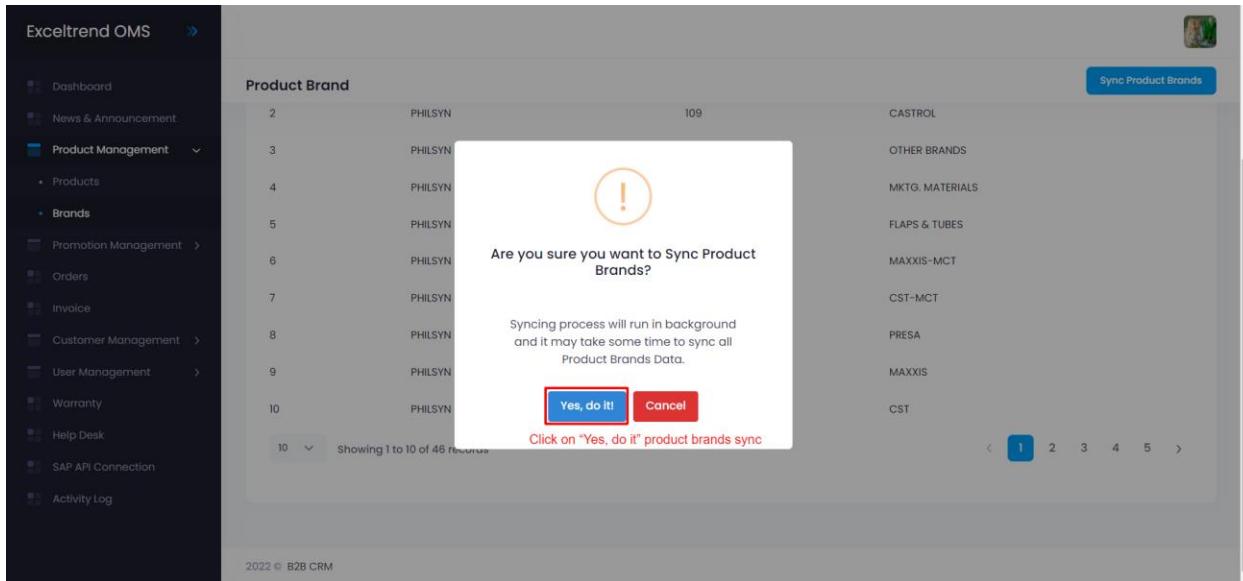


2.3 Steps: - How to sync the product Brands.

- 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/6ezY1Qfli>

3.1.1 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 like 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 area is titled 'Promotions' and contains a table with two rows of promotion data. The columns are No., Business Unit, Title, Promotion Customers, Start Date, End Date, Status, and Action. Row 1: APBW, Valentine Day, Customer, Feb 28, 2022, Mar 28, 2022, Active, edit, delete, view. Row 2: NTMC, Chine New Year, Class, Feb 06, 2022, Feb 28, 2022, Active, edit, delete, view. Below the table is a message 'Showing 1 to 2 of 2 records'. At the top right of the main area, there is a blue 'Create' button with a red arrow pointing to it from the text '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.

The screenshot shows the 'Add Details' page for a new promotion. The left sidebar is identical to the previous screenshot. The main form has several input fields:

- Title*: A text input field labeled 'Enter Promotion Title'.
- Description: A text input field.
- Business Unit*: A dropdown menu labeled 'Select Business Unit'.
- Promotion Type*: A dropdown menu labeled 'Select Promotion Type'.
- Select Customer Group*: A dropdown menu labeled 'Select Customers'.
- Promotion Start Date*: A dropdown menu labeled 'Select Promotion Start Date'.
- Promotion end Date*: A dropdown menu labeled 'Select Promotion End Date'.
- Promotion Image*: A file input field labeled 'Choose File' with the placeholder 'No file chosen'.

A blue 'Save' button is at the bottom of the form. In the top right corner of the main area, there is a 'Back' button.

- 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.

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

Promotions

No.	Business Unit	Title	Code	Customer Group	Start Date	End Date	Status	Action
1	PHILCREST	PHILCREST Sale	SALE	All	Jun 06, 2022	Jun 30, 2022		
2	NTMC	Summer Sell 50 % Off	SUMMERSELL	All	May 27, 2022	May 31, 2022		
3	SOLID TREND	Summer Sell SOLID TREND	SELLTREND	All	May 26, 2022	Jun 30, 2022		
4	APBW	Summer Sell	SELLAPBW	All	May 26, 2022	Jun 30, 2022		

Showing 1 to 4 of 4 records

3.1.2 Steps: - How to edit the promotion.

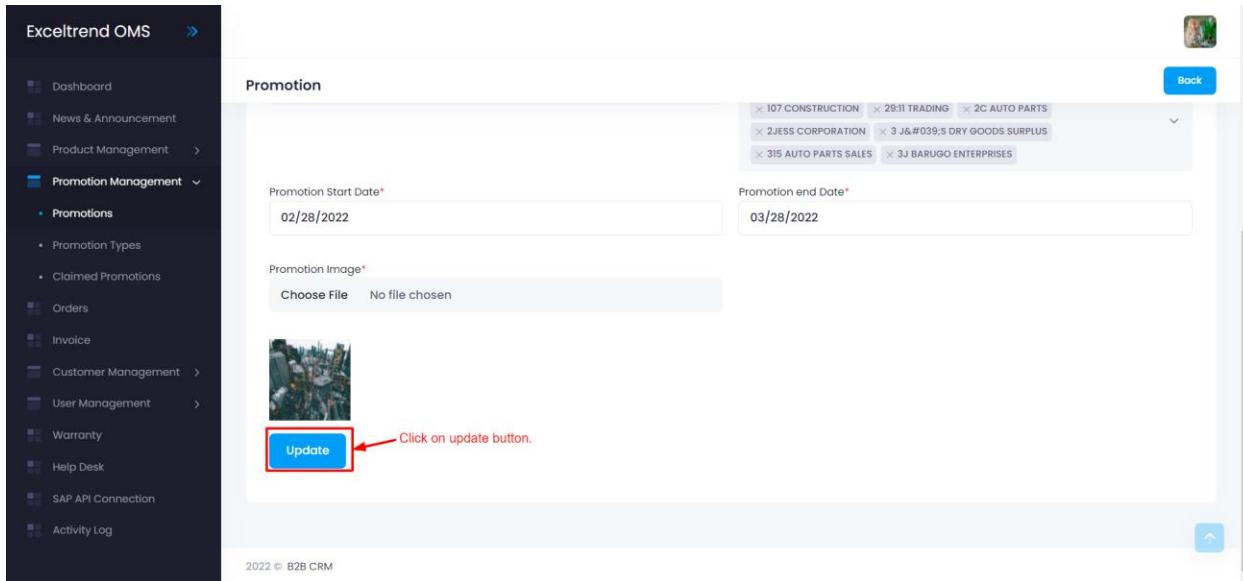
- Steps 1: - Click on pencil icon.

The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with various menu items like 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 area is titled 'Promotions' and contains a search bar with fields for 'Select business unit', 'Select promotion type', 'Select status', and 'Select promotion customers'. Below the search bar is a date range selector and a search input field. A table lists two promotions: 'Valentine Day' (Business Unit: APBW, Status: Active) and 'Chine New Year' (Business Unit: NTMC, Status: Active). Each row has an 'Action' column with icons for edit, delete, and view. A red box highlights the edit icon for the 'Valentine Day' row, and a red arrow points to it from the text 'Click on pencil icon'.

- Steps 2: - Update the data displayed filed.

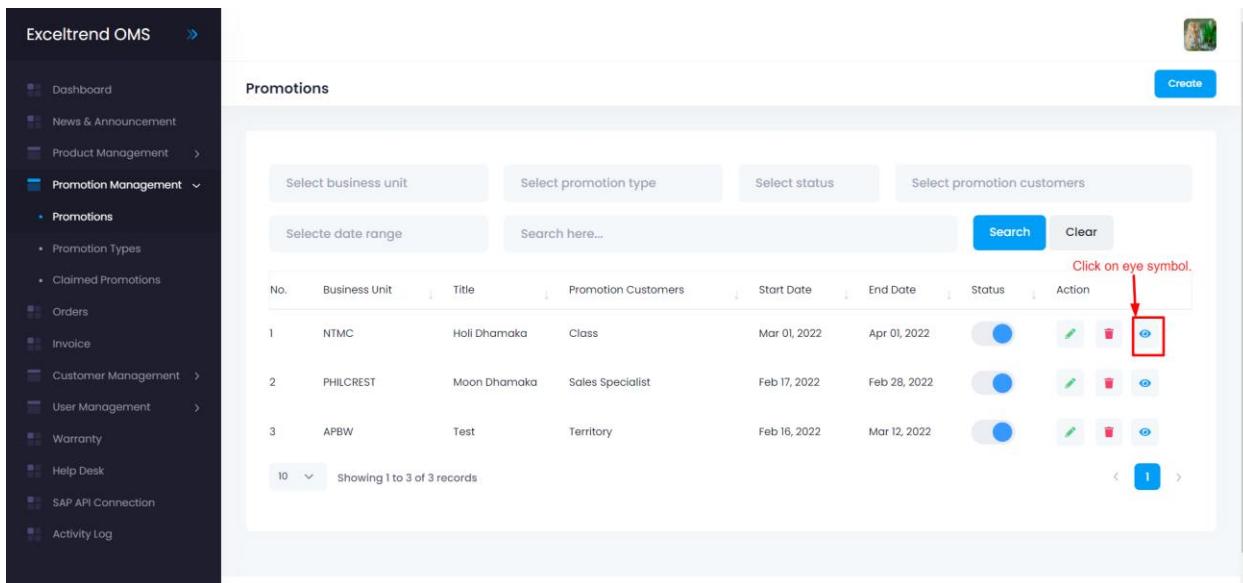
The screenshot shows the 'Promotion' details page for the 'Valentine Day' promotion. The sidebar on the left is identical to the previous screenshot. The main form is titled 'Update Details' and includes fields for 'Title*' (Valentine Day), 'Description' (Valentine Day), 'Business Unit*' (APBW), 'Promotion Type*' (Valentine Day), 'Select Customer Group*' (By Customer), 'Select Customer*' (a dropdown menu showing several customer names with 'X' close buttons next to them), 'Promotion Start Date*' (02/28/2022), 'Promotion end Date*' (03/28/2022), 'Promotion Image*' (a file input field with 'Choose File' and 'No file chosen' labels, showing a thumbnail of a cityscape image), and an 'Update' button at the bottom. A red box highlights the 'Update' button.

- 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

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

Showing 1 to 3 of 3 records

10 < >

Claimed Customer's

No.	Customer	Date Time	Action
-----	----------	-----------	--------

No data available in table

10 < >

Customer's Interest

No.	Customer	Is Interested ?
-----	----------	-----------------

No data available in table

10 < >

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3.1.4 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. It displays two rows of promotion data:

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

A red box highlights the status toggle button for the first promotion (APBW). Below the table, it says 'Showing 1 to 2 of 2 records'.

- 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 contains a large exclamation mark icon and 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 dialog, a note says 'Click on "Yes, change it" button the promotion status change'.

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

The screenshot shows the 'Promotions' section of the Exceltrend OMS. The left sidebar includes options like 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 area displays two promotion records:

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"/>	

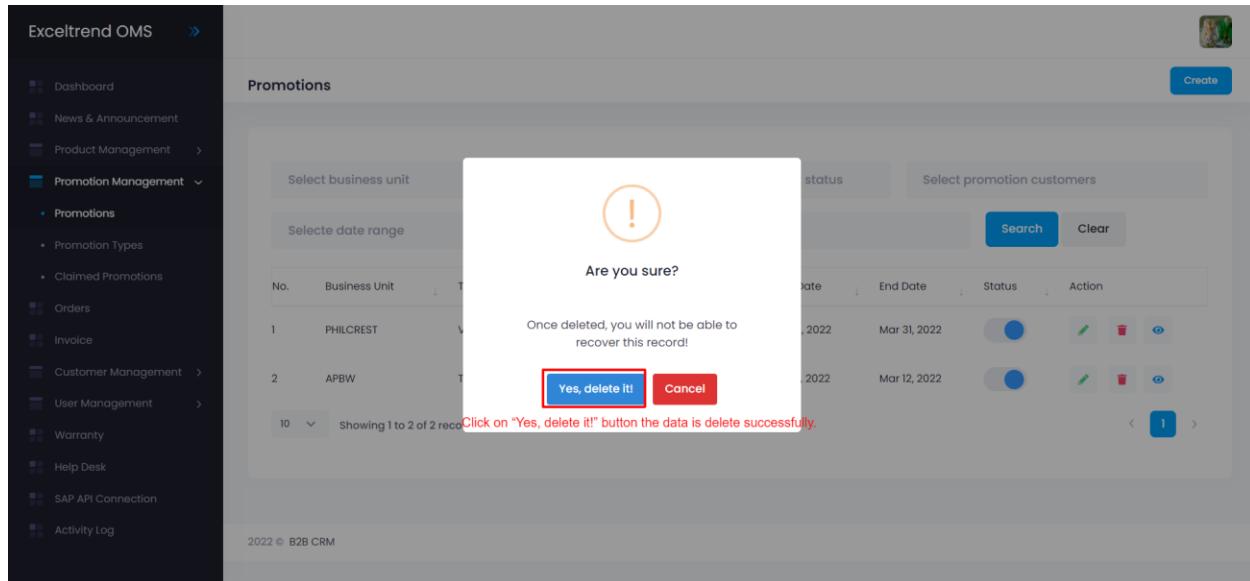
At the bottom, there is a message 'Showing 1 to 2 of 2 records' and navigation buttons.

3.1.5 Steps: - How to delete the promotion.

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

The screenshot shows the same 'Promotions' section as the previous one. The second promotion record, 'Test', has its trash icon highlighted with a red box and annotated with a red arrow pointing to it. The rest of the interface is identical to the first screenshot.

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

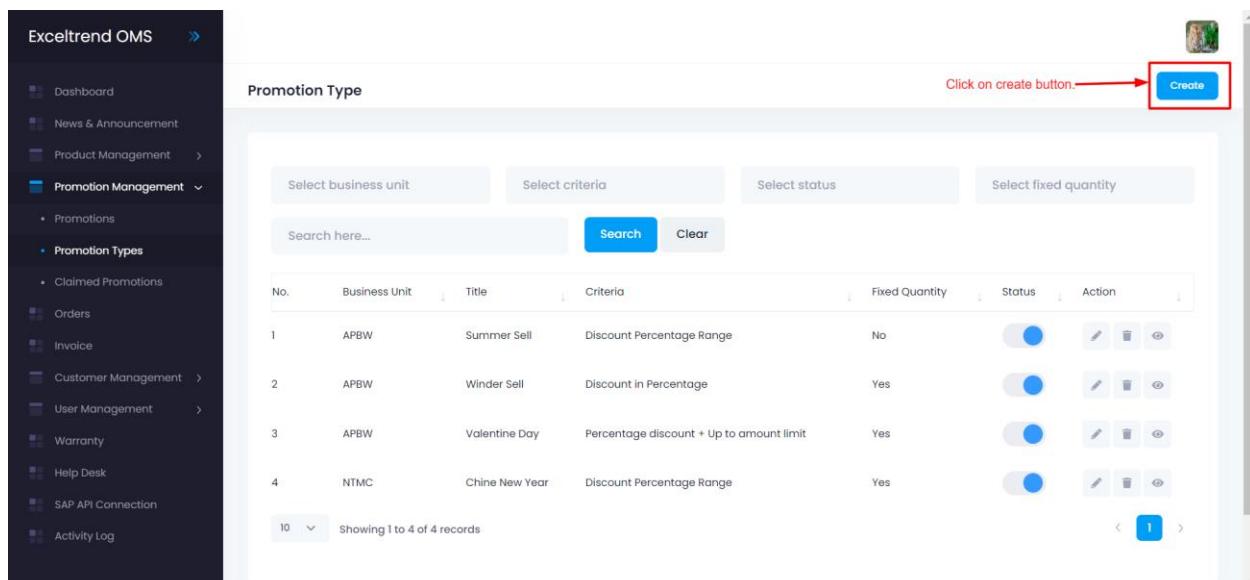


3.2 Promotion Type: -

- 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.

The screenshot shows the Exceltrend OMS software interface. On the left, there is a dark sidebar with a navigation menu. The 'Promotion Management' section is expanded, showing 'Promotions', 'Promotion Types' (which is selected), 'Claimed Promotions', 'Orders', 'Invoice', 'Customer Management', 'User Management', 'Warranty', 'Help Desk', 'SAP API Connection', and 'Activity Log'. The main content area is titled 'Promotion Type' and has a sub-section 'Add Details'. It contains fields for 'Promotion Type Title*', 'Criteria*', 'Description', 'Number Of Delivery*', 'Has Fixed Quantity ?*', 'Select Fixed Quantity Option*', 'Business Unit*', 'Brand*', 'Product*', and 'Fixed Quantity*'. There are also 'Add more' and 'Save' buttons at the bottom. A small 'Back' button is in the top right corner of the main form.

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

Promotion Type

Fixed Quantity Per Product

Business Unit*

Select business unit

Brand* Product* Fixed Quantity*

Select a brand Select a product Enter fixed quantity

Select a brand Select a product Enter fixed quantity Delete

Add more

Save

- Steps 4: - Click on save button.

Promotion Type

Fixed Quantity Per Product

Business Unit*

Select business unit

Brand* Product* Fixed Quantity*

Select a brand Select a product Enter fixed quantity

Select a brand Select a product Enter fixed quantity Delete

Add more

Save

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

The screenshot shows the 'Promotion Type' section of the Exceltrend OMS. The left sidebar has a dark theme with various menu items like Dashboard, News & Announcement, Product Management, and Promotion Management (selected). The main area has a light theme with a header 'Promotion Type' and a 'Create' button. Below the header are four filter buttons: 'Select business unit', 'Select criteria', 'Select status', and 'Select fixed quantity'. A search bar with placeholder 'Search here...', a 'Search' button, a 'Clear' button, and an 'Export Excel' button follow. The main table lists four promotion entries:

No.	Business Unit	Title	Criteria	Fixed Quantity	Status	Action
1	PHILCREST	PHILCREST Summer Sale	Discount Percentage Range	Yes	<input checked="" type="checkbox"/>	
2	SOLID TREND	Summer Sell Solid Trend	Percentage discount + Up to amount limit	Yes	<input checked="" type="checkbox"/>	
3	NTMC	50 % Off	Discount In Percentage	Yes	<input checked="" type="checkbox"/>	
4	APBW	Summer Sell APBW	Discount Percentage Range	Yes	<input checked="" type="checkbox"/>	

At the bottom left is a dropdown with '10' and a message 'Showing 1 to 4 of 4 records'. At the bottom right are navigation icons: back, forward, and a refresh symbol.

3.2.2 Steps: - How to edit the promotion.

- Steps 1: - Click on pencil icon.

This screenshot is identical to the one above, showing the 'Promotion Type' list. However, a red box highlights the edit icon (pencil icon) in the 'Action' column for the first promotion entry (Row 1). A red arrow points from the text 'Click on pencil icon.' to this specific edit icon.

- Steps 2: - Update the data displayed filed.

Excelltrend OMS ➤



Promotion Type

[Back](#)

Update Details

Promotion Type Title*	Criteria*
Moon Dhamaka	Percentage discount + Up to amount limit
Discount Percentage*	Discount Upto Amount*
25	5000
Description	
Moon Dhamaka	
Number Of Delivery*	Has Fixed Quantity ?*
5	No
Business Unit*	
PHILCREST	
Brand*	Product*
CHEMICALS	***PHOSPHORIC ACID 85% KG...
Add more	
Update	

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- Steps 3: - Click on update button.

Excelltrend OMS ➤



Promotion Type

[Back](#)

Update Details

Number Of Delivery*	Has Fixed Quantity ?*
5	No
Business Unit*	
PHILCREST	
Brand*	Product*
CHEMICALS	***PHOSPHORIC ACID 85% KG...
Add more	
Update	

Click on update button.

2022 © B2B CRM

3.2.3 Steps: - How to view the promotion type.

- Steps 1: - Click on eye icon.

The screenshot shows the 'Promotion Type' view in the Exceltrend OMS application. The left sidebar contains a navigation menu with categories like Dashboard, News & Announcement, Product Management, Promotion Management (selected), Promotions, Promotion Types, Claimed Promotions, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main content area is titled 'Promotion Type' and includes search filters for business unit, criteria, status, and fixed quantity. Below the filters is a search bar with 'Search' and 'Clear' buttons. The main table lists six promotion types:

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 displays the Exceltrend OMS application. On the left, a dark sidebar menu lists various management modules: 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 is titled "Promotion Type". It shows a "View Details" section with 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, which contains a single row:

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

At the bottom left of the main content area, there is a small text: "2022 © B2B CRM".

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

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

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: - 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.

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 3: - Update status show in listing page.

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"/>	Trash
2	NTMC	Holi Dhamaka	Discount Percentage Range	Yes	<input checked="" type="checkbox"/>	Edit Delete View
3	APBW	Diwali Dhamaka	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	Edit Delete View
4	APBW	Summer Sell	Discount Percentage Range	No	<input checked="" type="checkbox"/>	Edit Delete View
5	APBW	Winder Sell	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	Edit Delete View
6	APBW	Valentine Day	Percentage discount + Up to amount limit	Yes	<input checked="" type="checkbox"/>	Edit Delete View

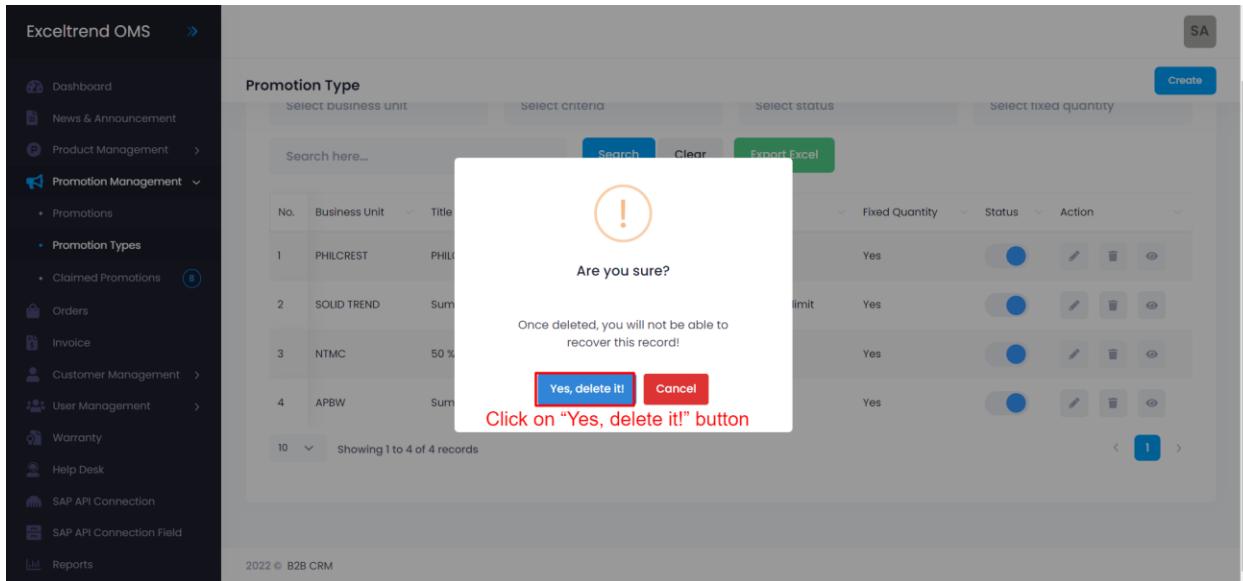
3.2.5 Steps: - How to delete the promotion type.

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

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"/>	Trash
2	NTMC	Holi Dhamaka	Discount Percentage Range	Yes	<input checked="" type="checkbox"/>	Edit Delete View
3	APBW	Diwali Dhamaka	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	Edit Delete View
4	APBW	Summer Sell	Discount Percentage Range	No	<input checked="" type="checkbox"/>	Edit Delete View
5	APBW	Winder Sell	Discount in Percentage	Yes	<input checked="" type="checkbox"/>	Edit Delete View
6	APBW	Valentine Day	Percentage discount + Up to amount limit	Yes	<input checked="" type="checkbox"/>	Edit Delete View

- 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.

Click on export excel button

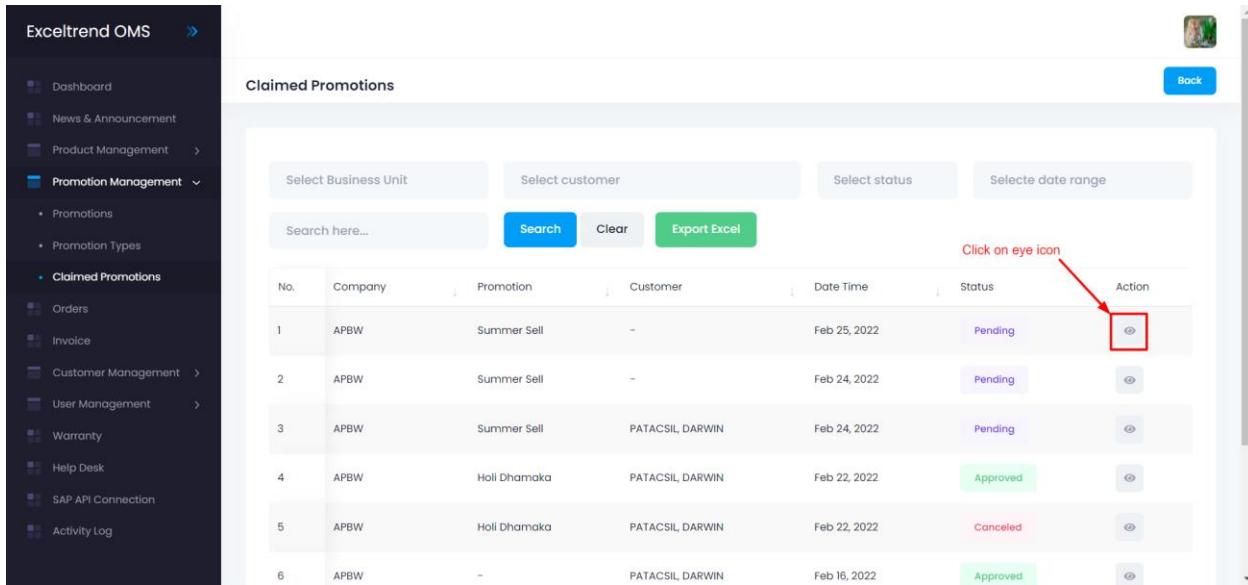
3.3 Claimed Promotions: -

- 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.



The screenshot shows the Exceltrend OMS software interface. On the left, there is a dark sidebar with various menu items. The 'Promotion Management' section is expanded, showing 'Promotions', 'Promotion Types', and 'Claimed Promotions'. Under 'Claimed Promotions', there are links for 'Orders' and 'Invoice'. The main area is titled 'Claimed Promotions' and contains a table with the following data:

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: PATAKSIL, 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

The screenshot shows the Exceltrend OMS software interface. The left sidebar contains a navigation menu with the following items:

- 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

The main content area is titled "Claimed Promotions". It displays an "Invoice" section with the following details:

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

The "Delivery details" section shows two products with their respective delivery dates and quantities:

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

The "Update Status" section contains a "Status" dropdown set to "Canceled" and a "Reason" input field with placeholder text "Enter cancel reasons". A green "Update" button is located below these fields.

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- Steps 3: - Click on update button.

The screenshot shows the Exceltrend OMS interface. On the left, a dark sidebar menu includes '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 is titled 'Claimed Promotions' and shows a date 'March 02, 2022'. Below this is a section titled 'Update Status' with a 'Canceled' status and a text input field 'Enter cancel reasons'. A red box highlights the green 'Update' button. To the right of the update button is the text 'Click on update button'. At the bottom of the page is a footer with the text '2022 © B2B CRM'.

3.3.2 Steps: - How to view the claimed promotions.

- Steps 1: - Click on eye icon.

The screenshot shows the 'Claimed Promotions' list page. The sidebar menu is identical to the previous screenshot. The main content area has a search bar with 'Search here...', a 'Search' button, a 'Clear' button, and an 'Export Excel' button. Below the search bar is a table with columns: No., Company, Promotion, Customer, Date Time, Status, and Action. The 'Action' column contains icons, one of which is highlighted with a red box and a red arrow pointing to it from the text 'Click on eye icon'. The table rows show various promotion details, such as 'Summer Sell' and 'Holi Dhamaka', with different statuses like 'Pending', 'Approved', and 'Canceled'.

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

The screenshot shows the Exceltrend OMS software interface. The left sidebar contains a navigation menu with the following items:

- 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

The main content area is titled "Claimed Promotions". It displays an "Invoice" section with the following details:

Customer:	Sales Specialist:
	ALBERT OPENA

Promotion Details: **Summer Sell** | Claimed Date: **February 25, 2022** | Promotion Status: **Pending**

A table lists the products and their details:

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 CR869(+) TL	1	₱ 15,572.91	₱ 778.65	₱ 14,794.26

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

The "Delivery details" section shows the delivery address:

Address:
3 J'S DRY GOODS SURPLUS

For the first product:

Delivery Date	Delivery Quantity
March 01, 2022	1

For the second product:

Delivery Date	Delivery Quantity
March 01, 2022	1

At the bottom left, it says "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>

4.1 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 management 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' and displays a table of four order entries. At the top right of the main area is a blue button labeled 'Sync Orders'. A red arrow points to this button with the text 'Click on sync 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 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 same Exceltrend OMS Orders page as the previous one, but now a modal dialog box is overlaid on the screen. The dialog has a white background with a large orange exclamation mark icon at the top. It contains the text "Are you sure want to sync Orders, Quotations, and Invoice data?". Below this, another line of text says "Syncing process will run in background and it may take some time to sync all Data.". At the bottom of the dialog are two buttons: a blue "Yes, do it!" button and a red "Cancel" button. A red arrow points to the "Yes, do it!" button with the text "Click on 'Yes, do it'".

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		

4.2 Steps: - How to view the orders.

- Steps 1: - Click on eye icon.

The screenshot shows the 'Orders' page in the Exceltrend OMS. The left sidebar has a dark theme with various menu items 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 area is titled 'Orders' and contains a search bar with fields for 'Select business unit', 'Select Customer By', 'Select customer', and 'Select date range'. Below the search bar are buttons for 'Search', 'Clear', and 'Export Excel'. A table lists four 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: - Orders details are displayed in orders view page.

The screenshot shows the 'Order Details' page for Order #101. The left sidebar is identical to the previous screenshot. The main area is titled 'Order Details' and contains the following information:

Customer Name:	Customer Branch:	Delivery Address:
109 AUTO SUPPLIES (Code: AVB-000185)	BACOLOD	109 AUTO SUPPLIES

Below this, there are sections for Sales Specialist (MITZI FORMOSO), Order # (101), Order Date (February 17, 2022), and Status (Pending). The Remarks field is empty. The product details table includes:

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

The total amount is ₱ 0.

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

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

The screenshot shows the Exceltrend OMS interface with the 'Orders' module selected. The main area displays a table of orders with columns: No, Business Unit, Order #, Customer Name, Total, Created Date, Status, and Action. The 'Action' column contains icons for viewing and updating the order, along with a bell icon. A red box highlights the bell icon for the first order, and a red arrow points to it from the text 'Click on bell icon.'

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.

The screenshot shows the same Orders page as above, but with a modal dialog box overlaid. The dialog contains a warning icon and the text: "Are you sure want to Order status update Email and notification to Customer?". It has two buttons: "Yes, do it!" and "Cancel". A red box highlights the "Yes, do it!" button. Below the dialog, a red arrow points to it with the text "Click on 'Yes, do it'" button."

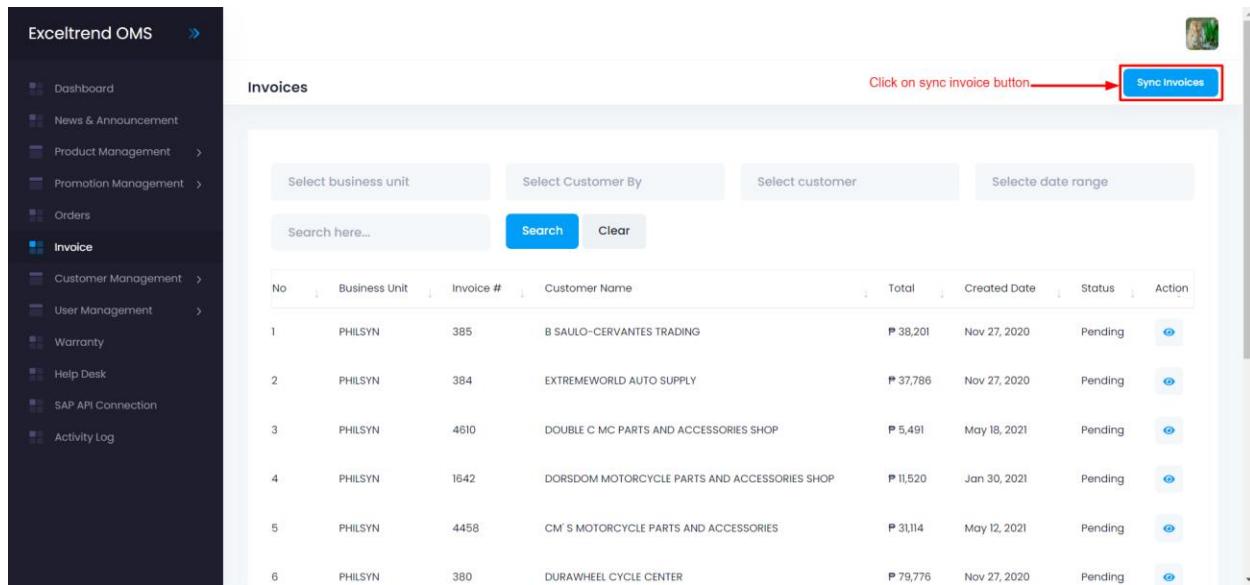
5. Invoice: -

- 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.



The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with various menu items: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, **Invoice** (which is currently selected), Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main area is titled 'Invoices'. It has four search/filter boxes: 'Select business unit', 'Select Customer By', 'Select customer', and 'Select date range'. Below these is a search bar with 'Search' and 'Clear' buttons. A table lists six invoices with columns: No, Business Unit, Invoice #, Customer Name, Total, Created Date, Status, and Action. The 'Sync Invoices' button is located in the top right corner of the main area, with a red arrow pointing to it from the text 'Click on sync invoice button'.

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

- 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 interface with the 'Invoice' module selected. A modal dialog box is centered over the table, asking 'Are you sure want to sync Invoice data?'. It includes a note about the background sync process and two buttons: 'Yes, do it!' (highlighted with a red box) and 'Cancel'. Below the dialog, a red box highlights the instruction 'Click on "Yes, do it" button'.

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	DORSDOM 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	

5.2 Steps: - How to view the invoice.

- Steps 1: - Click on eye icon.

The screenshot shows the same invoices list as the previous one, but the first row has been selected. A red box highlights the 'Action' column for the first invoice, and an arrow points to the eye icon 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	DORSDOM 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.

Invoice Details

Customer Name:	Customer Branch:	Delivery Address:		
B SAULO-CERVANTES TRADING (Code: AXE0013)	BACOLOD	PULONG STA. CRUZ, STA. ROSA CITY, LAGUNA 4027 PHILIPPINES		
Sales Specialist:	Invoice #:	Order Date:	Status:	
John Oliver Savedra	385	November 27, 2020	Pending	
Remarks:	-			
Product	Delivery Date	Quantity	Price	Amount
Castrol Magnatec Diesel 15W-40 API SN/CF 3 x 5L	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 24x1L	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.
 - 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.

The screenshot shows the Exceltrend OMS Customer Management page. On the left is a dark sidebar with various menu items. Under 'Customer Management', 'Customers' is selected, showing sub-options like 'Customer Tagging', 'Class', 'Groups', 'Delivery Schedule', 'Sales Specialist Assignment', 'User Management', 'Warranty', and 'Help Desk'. The main area is titled 'Customer' and contains a table of customer data. At the top right of the table area is a blue button labeled 'Sync Customers' with a red box around it. An arrow points from the text 'Click on sync customer button.' to this button.

No.	Customer Code	Name	Date Created	Credit Limit	Business Unit	Universal Carr	Action
1	B001	TB test b Code: B001 Email: b001-2@mailinator.com	Feb 16, 2022	0	NTMC	I232I32I32	
2	A001	TA test A Code: A001 Email: a001-2@mailinator.com	Feb 16, 2022	0	NTMC	I232I32I31	
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 same Exceltrend OMS Customer Management page as the previous one, but with a modal dialog box overlaid. The dialog has a warning icon and asks 'Are you sure you want to Sync Customers?'. It also states 'Syncing process will run in background and it may take some time to sync all Customers Data.' At the bottom of the dialog are two buttons: 'Yes, do it!' (highlighted with a red box) and 'Cancel'. A red arrow points from the text 'Click on "Yes, do it!" button.' to the 'Yes, do it!' button in the dialog. The background table of customers is partially visible behind the dialog.

6.1.2 Steps: - How to view the Customer details.

- Steps 1: - Click on eye icon.

The screenshot shows the Exceltrend OMS Customer Management interface. On the left, there is a sidebar with various menu items. Under 'Customer Management', the 'Customers' option is selected. The main area is titled 'Customer' and displays a list of five customers with columns for No., Customer Code, Name, Date Created, Credit Limit, Business Unit, and Universal Card Action. An eye icon in the 'Universal Card Action' column for the first customer (B001) is highlighted with a red box and labeled 'Click on eye icon.' A blue 'Sync Customers' button is located in the top right corner of the main area.

No.	Customer Code	Name	Date Created	Credit Limit	Business Unit	Universal Card 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 Code: C13865 Email: henryl@henry.com	Feb 10, 2022	0	APBW	04653
4	PS2451	AC Code: PS2451 Email: ps2451-4@mailinator.com	Feb 10, 2022	0	PHILSYN	04651
5	PS2450	BM 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 the following items:

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

The main content area has a header "Customer" with a "Back" button and a user profile icon. It displays "View Details" for a customer record:

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:

No.	Type	Address	Street
No data available in table			

At the bottom left is a footer: "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>

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>

6.4 Groups: -

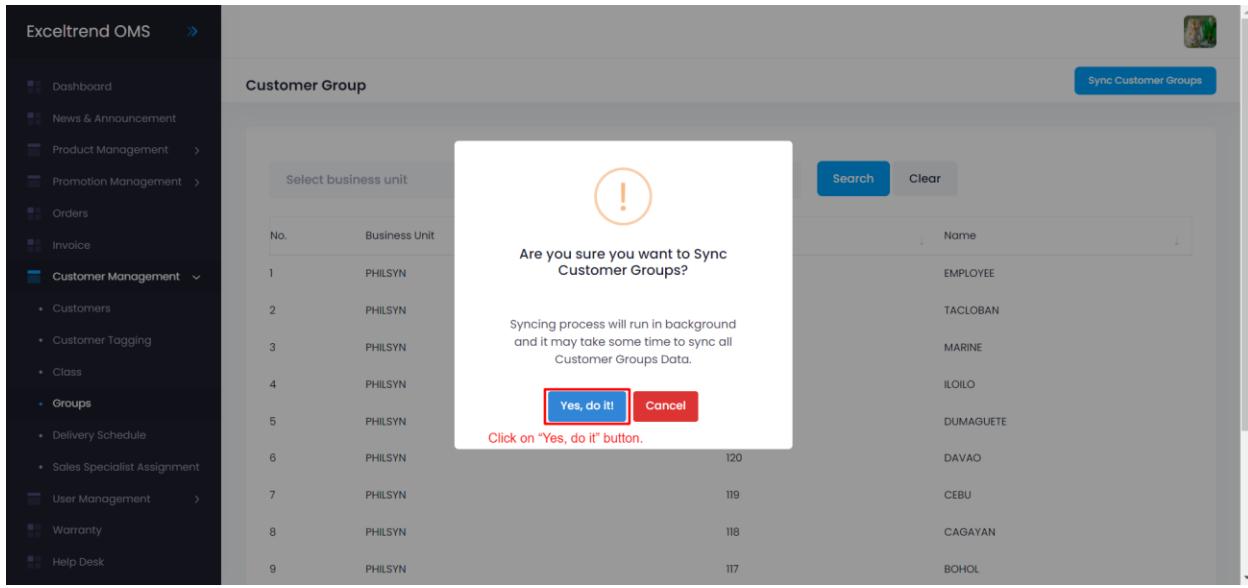
- Admin can sync the customers group data over here.
- Admin view the customers group details over here.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Video link: - <https://www.screencast.com/t/sP2mkhpU>

6.4.1 Steps: - How to sync customers group data.

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

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.



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.

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-	

Search here... Select territory Search Clear

View All Schedule New Schedule

Click on a new schedule button.

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

Add Details

Territory* Select Territory

Customers* Select Customers

Schedule Dates* Schedule Dates

Save

- Steps 3: - Click on save button.

Customer Delivery Schedule

Add Details

Territory*
Select Territory

Customers*
Select Customers

Schedule Dates*
Schedule Dates

Save *Click on save button*

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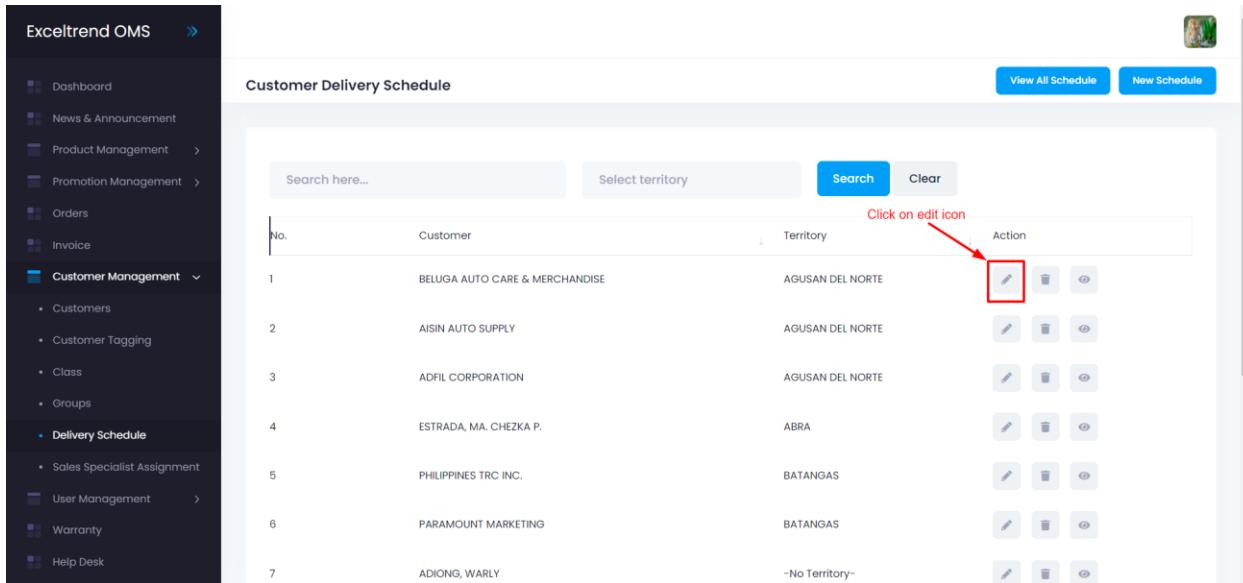
- Steps 4: - Created delivery schedule is display in listing page.

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-	

6.5.2 Steps: - How to edit the delivery schedule.

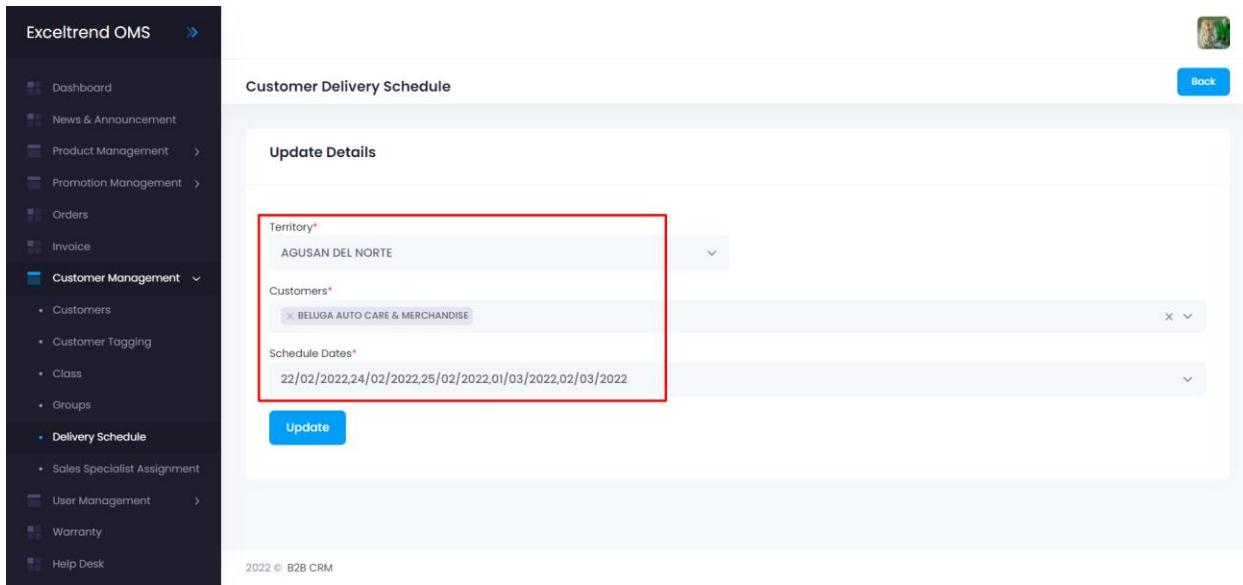
- Steps: - 1 Click on edit icon.



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 Update the data.



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.

6.5.3 Steps: - How to view the delivery schedule.

- Steps 1: - Click eye icon.

No.	Customer	Territory	Action	Click eye icon
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-		

 A vertical scroll bar is visible on the right side of the table area."/>

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

Customer : BELUGA AUTO CARE & MERCHANDISE

Schedule Details

Month	Year	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		
January	2022																																	
February	2022																																	
March	2022																																	
April	2022																																	
May	2022																																	
June	2022																																	
July	2022																																	
August	2022																																	

6.5.4 Steps: - How to delete the delivery schedule.

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

No.	Customer	Territory	Action
1	BELUGA AUTO CARE & MERCHANDISE	AGUSAN DEL NORTE	
2	AISIN AUTO SUPPLY	AGUSAN DEL NORTE	
3	ADFLIL 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 'Customer Delivery Schedule' page in the Exceltrend OMS system. A modal dialog box is centered over the table, asking 'Are you sure?'. Below the dialog, a note says 'Once deleted, you will not be able to recover this record!' with two buttons: 'Yes, delete it!' (highlighted with a red box) and 'Cancel'. The main table lists seven customer entries with columns for No., Customer, Territory, and Action.

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-	

6.5.5 Steps: - How to view all delivery schedule

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

The screenshot shows the same 'Customer Delivery Schedule' page. A red arrow points to the 'View All Schedule' button at the top right of the page, which is highlighted with a red box. The rest of the interface is identical to the previous screenshot.

- 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

month week

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		ADIFIL CORPORATION (Code: COIE) AISIN AUTO SUPPLY (Code: COIE) BELUGA AUTO CARE & MFG	ADIFIL CORPORATION (Code: COIE) AISIN AUTO SUPPLY (Code: COIE) BELUGA AUTO CARE & MFG		
27	28	1	2	3	4	5
	ADIFIL CORPORATION (Code: COIE) AISIN AUTO SUPPLY (Code: COIE) +4 more	ADIFIL 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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Excelltrend 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

Select customer

PARAMOUNT MARKETING

ADFIL CORPORATION

BELUGA AUTO CARE & MERCHANDISE

ESTRADA, MA. CHEZKA P.

ABELLO, REQUE

Select the customer name

ABATO, RICHARD (Code: I) 007ENCARR TIRE TRADING

ABELLANA,RUBETH (Code: C) 088 TRADING (Code: C01)

+6 more

I-STOP-AUTOSHOP AUTO

D07ENCARR TIRE TRADING

6 7 8 9 10 11 12

ABATO, RICHARD (Code: I)
ABELLANA,RUBETH (Code: C)

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>

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

- Steps 1: - Click on new assignment button.

Click on new assignment button.

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	8PLY 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.

Exceltrend OMS

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.

Exceltrend OMS

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.

The screenshot shows the Exceltrend OMS application. The left sidebar has a dark theme with various menu items like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), User Management, Warranty, and Help Desk. The main content area is titled 'Customers Sales Specialist'. It features a search bar with fields for 'Search here...', 'Select business unit', and buttons for 'Search' and 'Clear'. Below is a table with columns: No., Business Unit, Customer, and Action. The data shows 7 rows of customer assignments. Each row has an edit icon (pencil) highlighted with a red box, indicating where to click to update the data.

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	5SZAIKEN TRANSPORT CORP.	
7	APBW	5N PLAINFIELD MARKETING INC	

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

- Steps: - 1 Click on edit icon.

This screenshot is similar to the one above, showing the 'Customers Sales Specialist' list page. A red arrow points from the text 'Click on edit icon' to the edit icon (pencil symbol) in the first row's action column. This visual cue guides the user to the specific field they need to click to begin editing the data.

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	5SZAIKEN TRANSPORT CORP.	
7	APBW	5N PLAINFIELD MARKETING INC	

- Steps: - 2 Update the data.

Excelltrend OMS

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, ALBERT OPENA, 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.

Excelltrend OMS

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, ALBERT OPENA, 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

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

- Steps 1: - Click eye icon.

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	5SZAIKEN TRANSPORT CORP.	
7	APBW	5N PLAINFIELD MARKETING INC	

- 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.

The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with various menu items. The main area is titled 'Customers Sales Specialist' and displays a table of customers. The table has columns for No., Business Unit, Customer, and Action. The 'Action' column contains icons for edit, delete, and view. A red box highlights the delete icon for the first customer entry (No. 1). At the top right of the main area are 'Upload Assignment' and 'New Assignment' buttons.

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	5SZAIKEN 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.

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 at the top, the text 'Are you sure?', and a note below stating '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'. Below the dialog, the main table of customers is visible.

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	5SZAIKEN TRANSPORT CORP.	
7	APBW	5N PLAINFIELD MARKETING INC	

6.6.5 Steps: - How to upload assignment.

- Steps 1: - Click on upload assignment button.

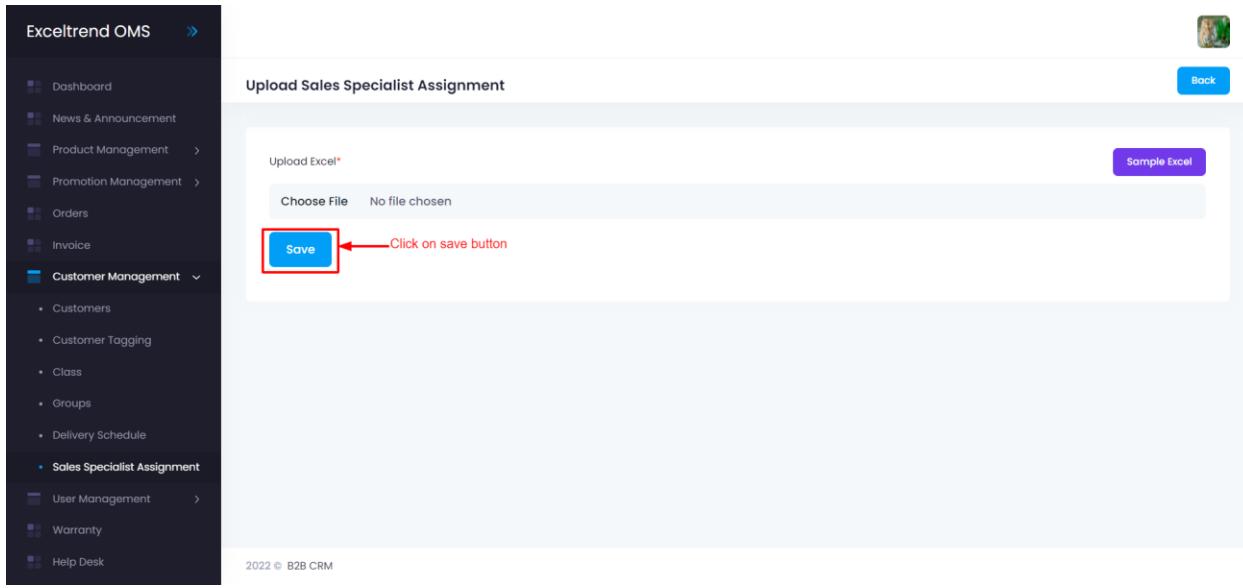
The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with various menu items under 'Customer Management'. The main area is titled 'Customers Sales Specialist'. At the top right are 'Upload Assignment' and 'New Assignment' buttons. A red arrow points to the 'Upload Assignment' button. Below it is a search bar with fields for 'Search here...', 'Select business unit', 'Search', and 'Clear'. A table lists 7 rows of customer data with actions for each row.

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

- Steps 2: - Upload the excel file.

The screenshot shows the 'Upload Sales Specialist Assignment' page. It has a sidebar with 'Customer Management' selected. The main area has a 'Back' button and a 'Choose File' input field with 'No file chosen'. There is also a 'Sample Excel' button and a 'Save' button at the bottom. The footer says '2022 © B2B CRM'.

- Steps 3: - Click on save button.



7. User Management Module: -

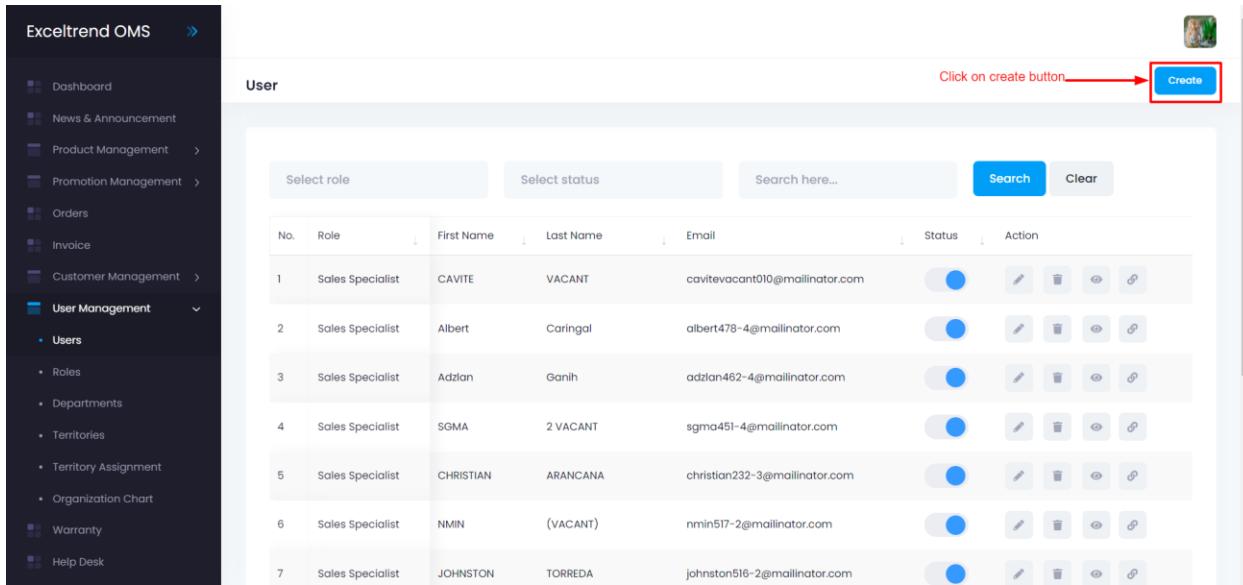
- There are five sub modules in this module and all modules explain in details one by one.
 - Users.
 - Roles
 - Department.
 - Territories.
 - Organization Chart.

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>

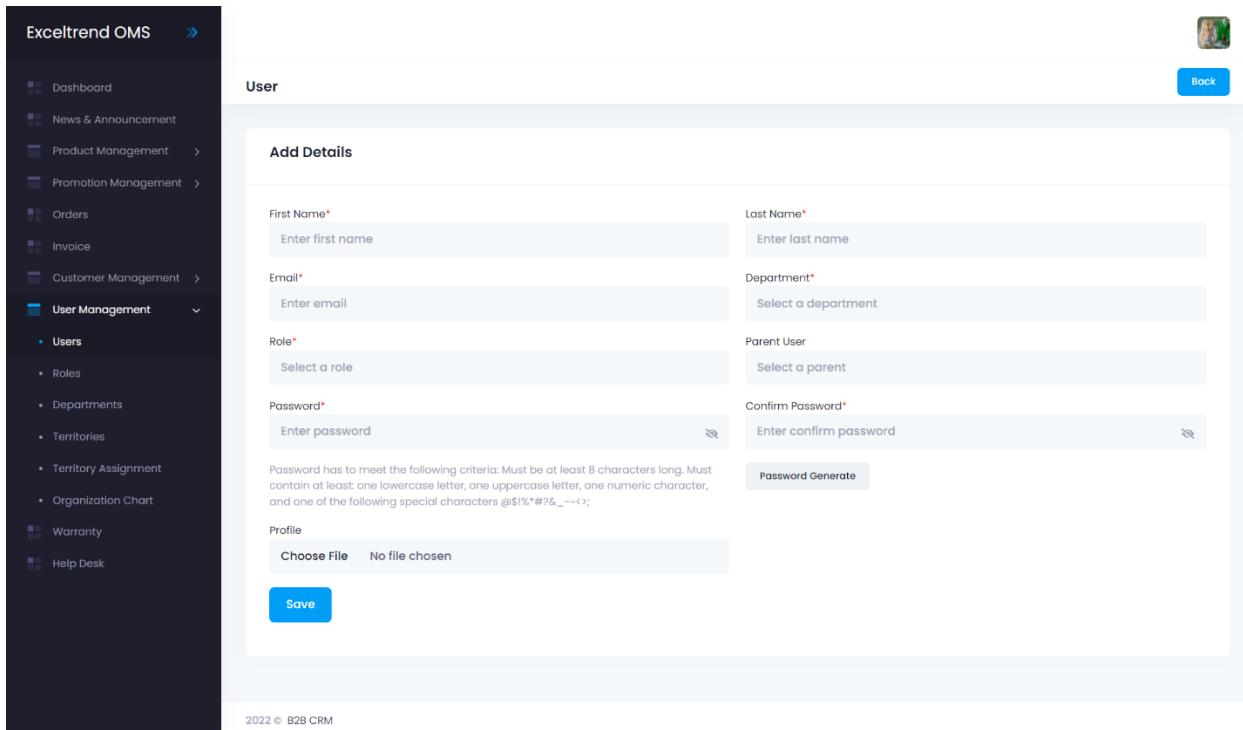
7.1.1 Steps: - How to create a new user.

- Steps 1: - Click on create button.



User						
Select role		Select status		Search here...		
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	Gonih	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: - 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.



Add Details

First Name*	Last Name*
Enter first name	Enter last name
Email*	Department*
Enter email	Select a department
Role*	Parent User
Select a role	Select a parent
Password*	Confirm Password*
Enter password	Enter confirm password
Password has to meet the following 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 @#\$%^&*()_+-<>;	
<input type="button" value="Password Generate"/>	
Profile	
Choose File No file chosen	
<input type="button" value="Save"/>	

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- Steps 3: - Click on save button.

User

Email*
Enter email

Department*
Select a department

Role*
Select a role

Password*
Enter password

Confirm Password*
Enter confirm password

Profile
Choose File No file chosen

Save Click on save button

2022 © B2B CRM

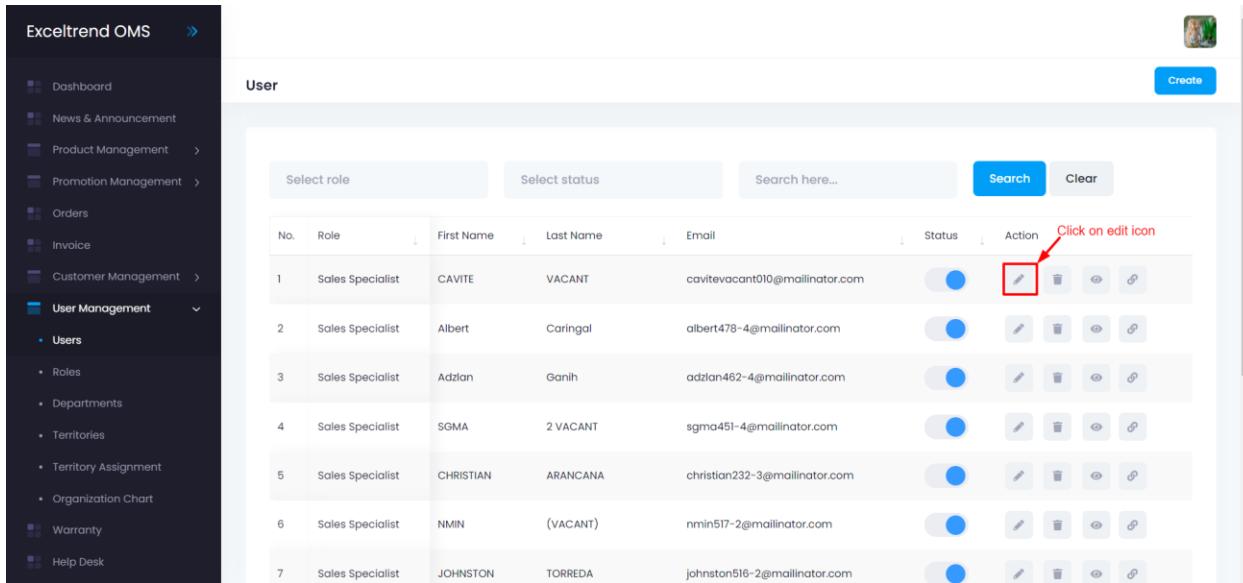
- Steps 4: - Created user show in user listing page.

User

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	Adzian	Gonih	adzian462-4@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"/>				

7.1.2 Steps: - How to edit the user.

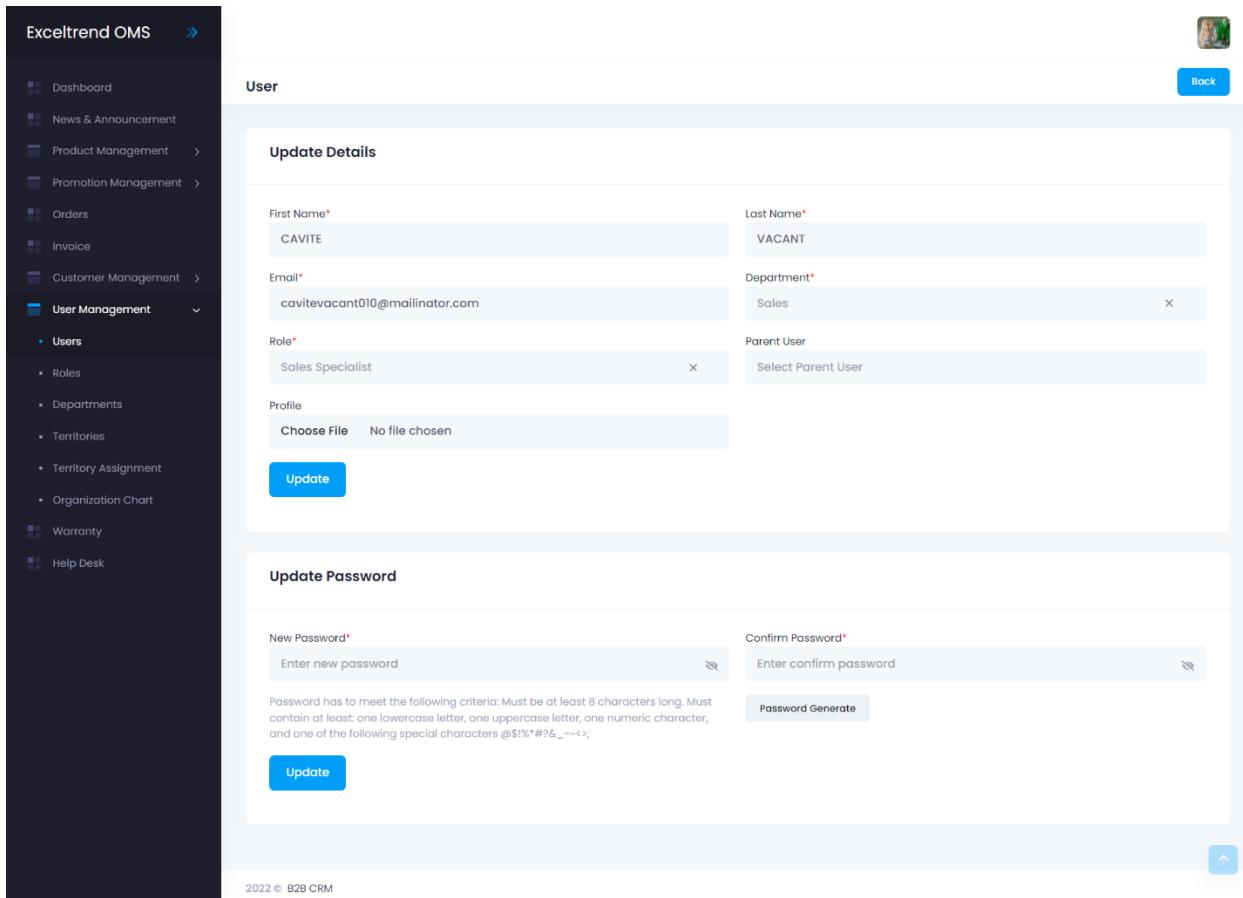
- Steps 1: - Click on edit icon.



The screenshot shows the 'User' management page. At the top right, there are 'Create' and 'Search' buttons. Below the search bar is a table with columns: No., Role, First Name, Last Name, Email, Status, and Action. The 'Action' column contains icons for edit, delete, view, and other actions. A red box highlights the edit icon for the first user (No. 1). The table data is as follows:

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	Gonih	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 the user with ID 1. The form fields are as follows:

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

Below the update form is another section titled 'Update Password' with fields for New Password* and Confirm Password*. There is also a 'Password Generate' button and an 'Update' button.

- Steps 3: - Click on update button.

First Name*
CAVITE

Last Name*
VACANT

Email*
cavitevacant010@mailinator.com

Department*
Sales

Role*
Sales Specialist

Profile
Choose File No file chosen

Update Click on update button

7.1.3 Steps: - How to view the user details.

- Steps 1: - Click on eye icon.

Select role Select status Search here... Search Clear

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

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

The screenshot shows the Exceltrend OMS application 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, 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 content area is titled "User" and displays a "View Details" section for a user named "CAVITE VACANT". The details include:

- First Name: CAVITE
- Last Name: VACANT
- Email: cavitevacant01@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
- Status: Active

Below this is a "Hierarchy View" section, which shows a grid-based diagram with a central node labeled "Sales Specialist" above "CAVITE VACANT".

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

7.1.4 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 Exceltrend OMS User Management interface. 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 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. The 'Status' column for the first row (ID 1) has a blue circle icon, which is highlighted with a red box. The 'Action' column for each row contains icons for edit, delete, view, and other operations.

No.	Role	First Name	Last Name	Email	Status	Action
1	Sales Specialist	CAVITE	VACANT	cavitevacant01@mailinator.com		
2	Sales Specialist	Albert	Caringal	albert478-4@mailinator.com		
3	Sales Specialist	Adzlan	Gonih	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 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 interface as the previous one, but with a modal dialog box overlaid. The dialog has a yellow exclamation mark icon at the top and 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 dialog, a note says "click on 'Yes, change it'" button. The background table of users is partially visible.

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

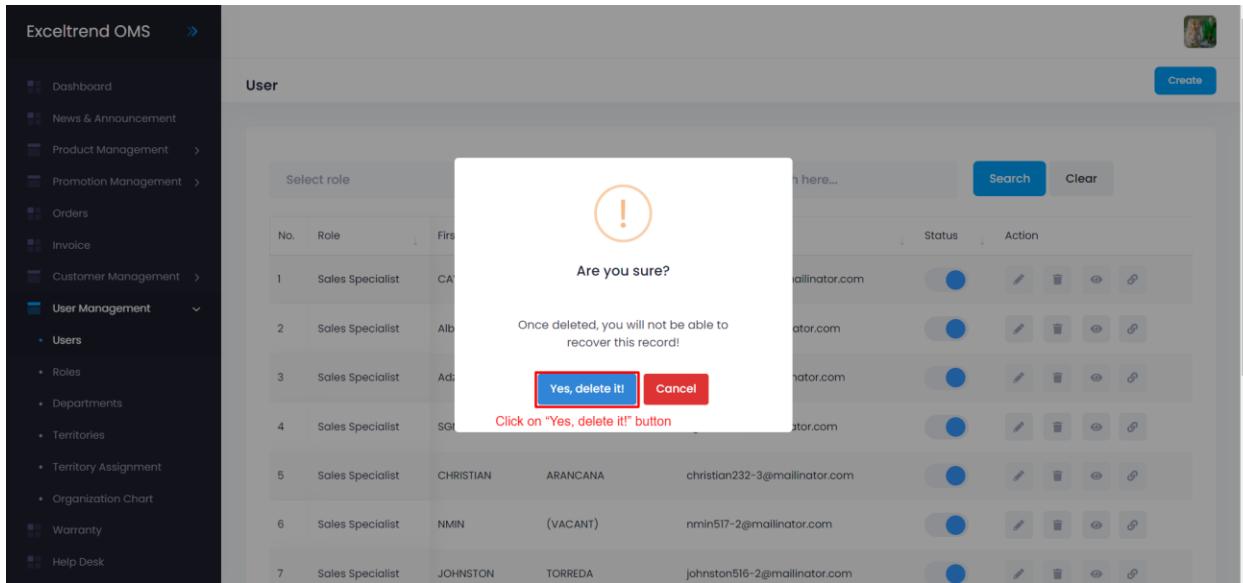
No.	Role	First Name	Last Name	Email	Status	Action
1	Sales Specialist	CAVITE	VACANT	cavitevacant01@mailinator.com	<input type="checkbox"/>	
2	Sales Specialist	Albert	Caringal	albert478-4@mailinator.com	<input checked="" type="checkbox"/>	
3	Sales Specialist	Adzlan	Gonih	adzlan462-4@mailinator.com	<input 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"/>	

7.1.5 Steps: - How to delete the user.

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

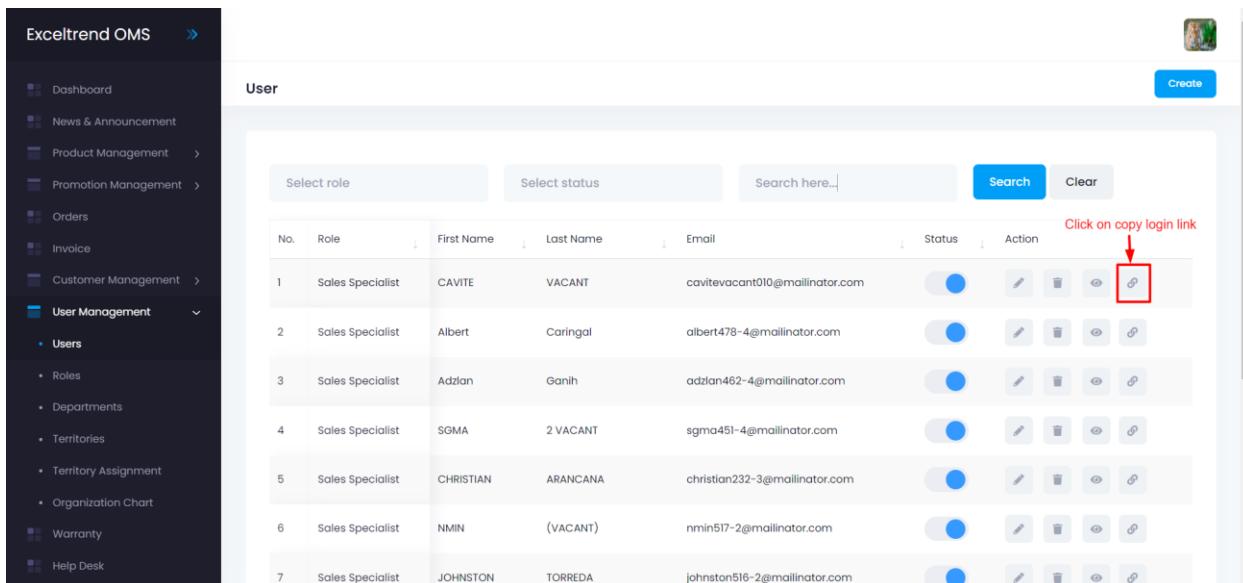
No.	Role	First Name	Last Name	Email	Status	Action
1	Sales Specialist	CAVITE	VACANT	cavitevacant01@mailinator.com	<input checked="" type="checkbox"/>	
2	Sales Specialist	Albert	Caringal	albert478-4@mailinator.com	<input checked="" type="checkbox"/>	
3	Sales Specialist	Adzlan	Gonih	adzlan462-4@mailinator.com	<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: - Pop-up model appear and show message “Are you sure?” and click on “Yes, delete it!” button the data is delete successfully.

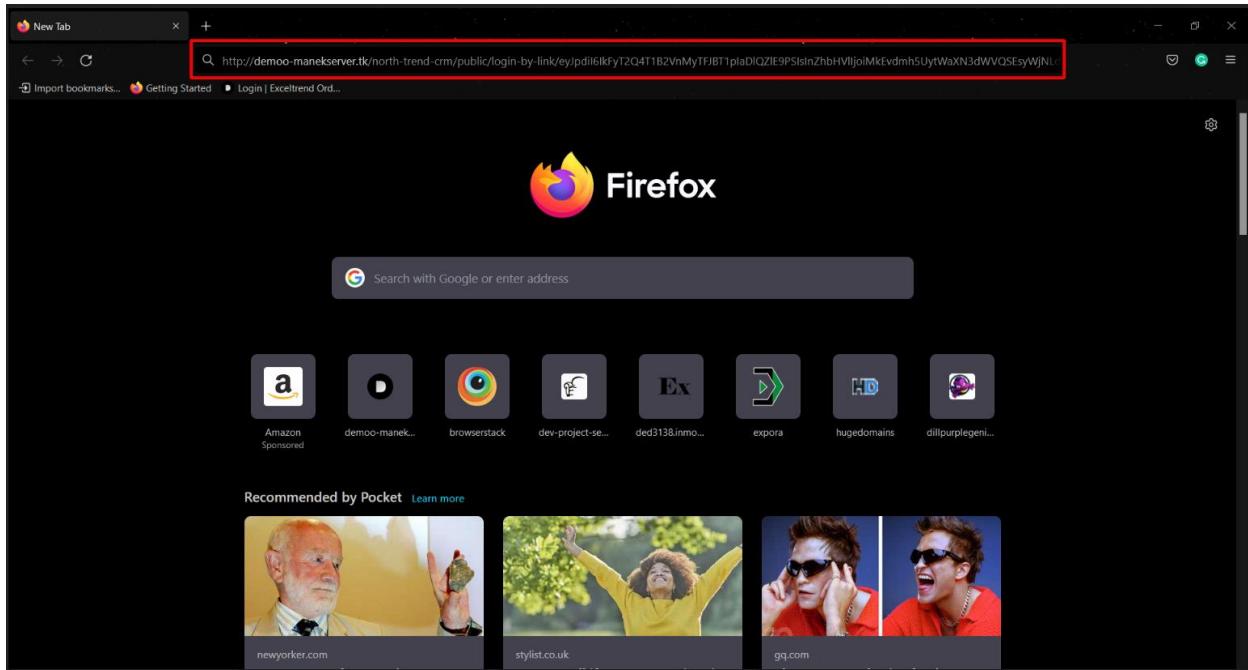


7.1.6 Steps: - How to direct login for particular user.

- 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/twji0H5t>

7.2.1 Steps: - How to create a new role.

- Steps 1: - Click on create a button.

A screenshot of the 'Role' management screen in the 'Exceltrend OMS' application. The left sidebar shows a navigation menu with 'User Management' expanded, showing 'Users', 'Roles', 'Departments', 'Territories', 'Territory Assignment', 'Organization Chart', 'Warranty', and 'Help Desk'. The main content area has a title 'Role' with a 'Create' button highlighted by a red box and an arrow pointing to it with the text 'Click on create a button'. Below the title is a search bar with fields for 'Select parent', 'Search here...', 'Search', and 'Clear'. A table lists four roles: 'Sales_Tesr' (Parent: Sales Specialist, Access: All Module Access), 'Customer' (Parent: -, Access: Custom Module Access), 'Support' (Parent: -, Access: All Module Access), and 'Sales Specialist' (Parent: -, Access: Custom Module Access). At the bottom, it says 'Showing 1 to 4 of 4 records'. The footer of the application includes the text '2022 © B2B CRM'.

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

The screenshot shows the 'Role' creation page in the Exceltrend OMS application. The left sidebar contains a navigation menu with various modules like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (which is currently selected), Roles, Departments, Territories, Territory Assignment, Organization Chart, Warranty, and Help Desk. The main content area is titled 'Role' and has a sub-section 'Add Details'. It includes fields for 'Role Name*' (with placeholder 'Enter role name'), 'Parent' (with placeholder 'Select a parent'), and 'Select Access*' (with a dropdown menu showing 'Select Access'). A red box highlights these three fields. Below these fields is a list of checkboxes for permissions: User Management, Customer Management, Product Management, Order, Invoice, My Promotions, and Product List. At the bottom of the form is a blue 'Save' button. The footer of the page says '2022 © B2B CRM'.

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

Exceltrend OMS

Dashboard

News & Announcement

Product Management

Promotion Management

Orders

Invoice

Customer Management

User Management

- Users
- Roles
- Departments
- Territories
- Territory Assignment
- Organization Chart

Warranty

Help Desk

Role

Add Details

Role Name*

Enter role name

Parent

Select a parent

Select Access*

Select Access

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

Save

2022 © B2B CRM

- Steps 4: - Click on save button.

Add Details

Role Name*	Parent	Select Access*
Enter role name	Select a parent	Select Access

User Management
Customer Management
Product Management
Order
Invoice
My Promotions
Product List

Save Click on save button

7.2.2 Steps: - How edit the role.

- Steps 1: - Click on pencil icon.

Role

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	

Showing 1 to 4 of 4 records

- Steps 2: - Update the data.

The screenshot shows the Exceltrend OMS Role Management interface. On the left is a dark sidebar with navigation links: 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 area is titled 'Role' and shows an 'Update Details' form. The 'Role Name*' field contains 'Sales_Testr', the 'Parent' field is set to 'Sales Specialist', and the 'Select Access*' dropdown is set to 'All Menu Access'. The 'Permissions' section lists numerous checked checkboxes under categories like User Management, Customer Management, Product Management, and Order. At the bottom is a blue 'Update' button.

- Steps 3: - Click on update button.

Role

- Add/Sync
- Edit
- View
- Product Brand
 - Add/Sync
 - View
- Order
 - Add/Sync
 - View
- Invoice
 - Add/Sync
 - View
- My Promotions
 - View
- Product List
 - View

Update

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.

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		

Select parent

Search here...

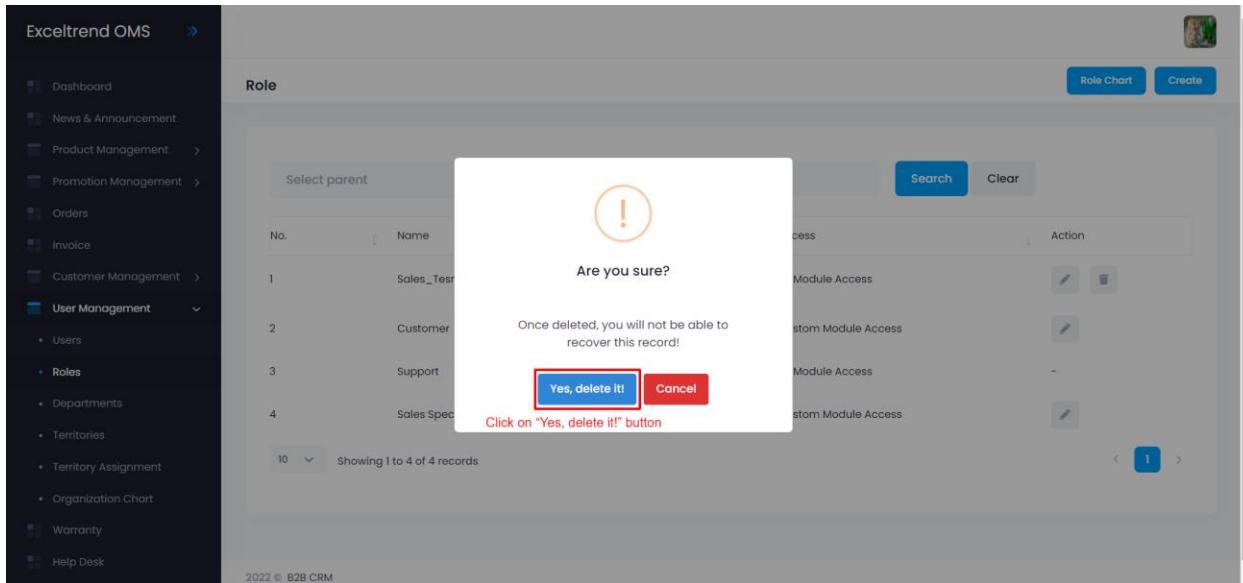
Search Clear

Showing 1 to 4 of 4 records

Role Chart Create

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.

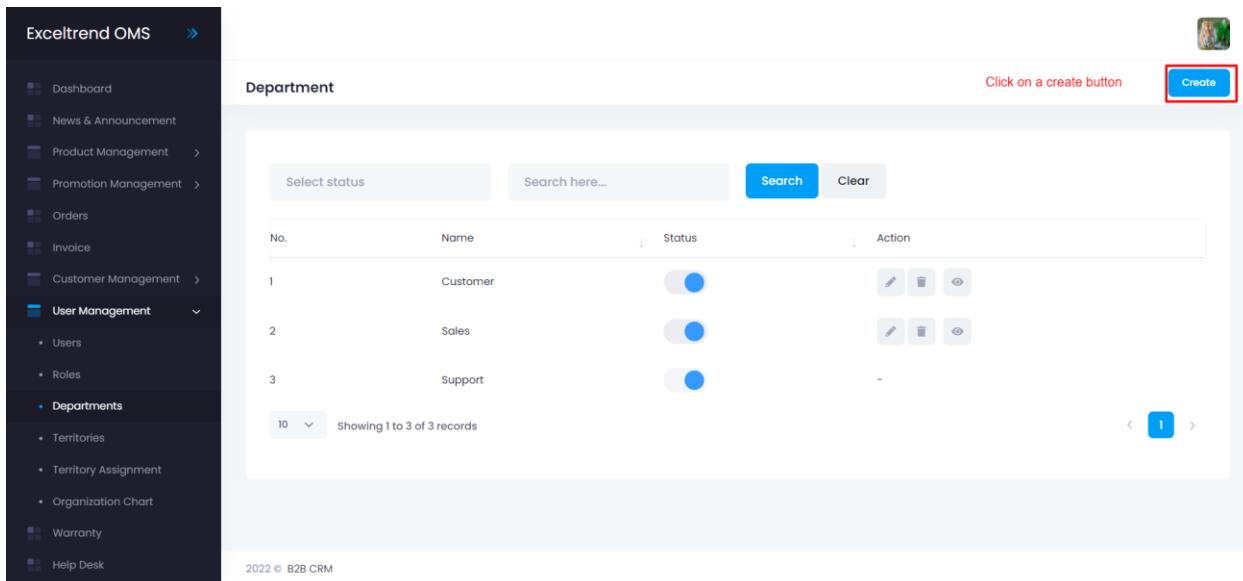


7.3 Departments: -

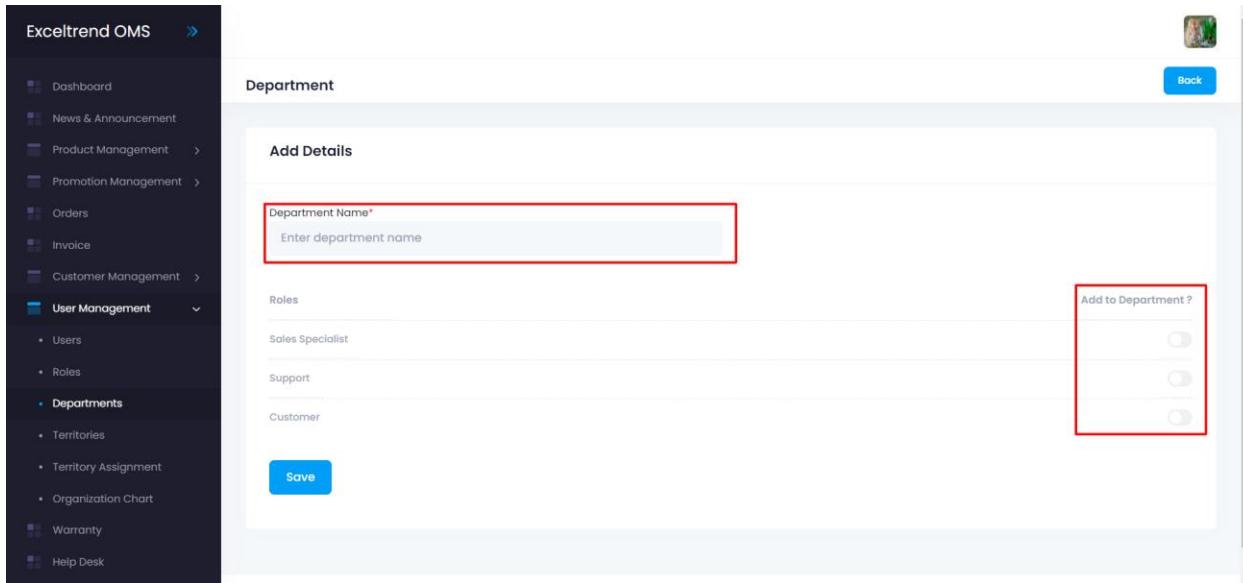
- Admin can create, edit, update, view and delete the departments.
- Admin can search the data using the search box.
- Admin can use the different-different filter and filter the data.
- Video Link: - <https://www.screencast.com/t/ubRHUjFTH78>

7.3.1 Steps: - How to create a new department.

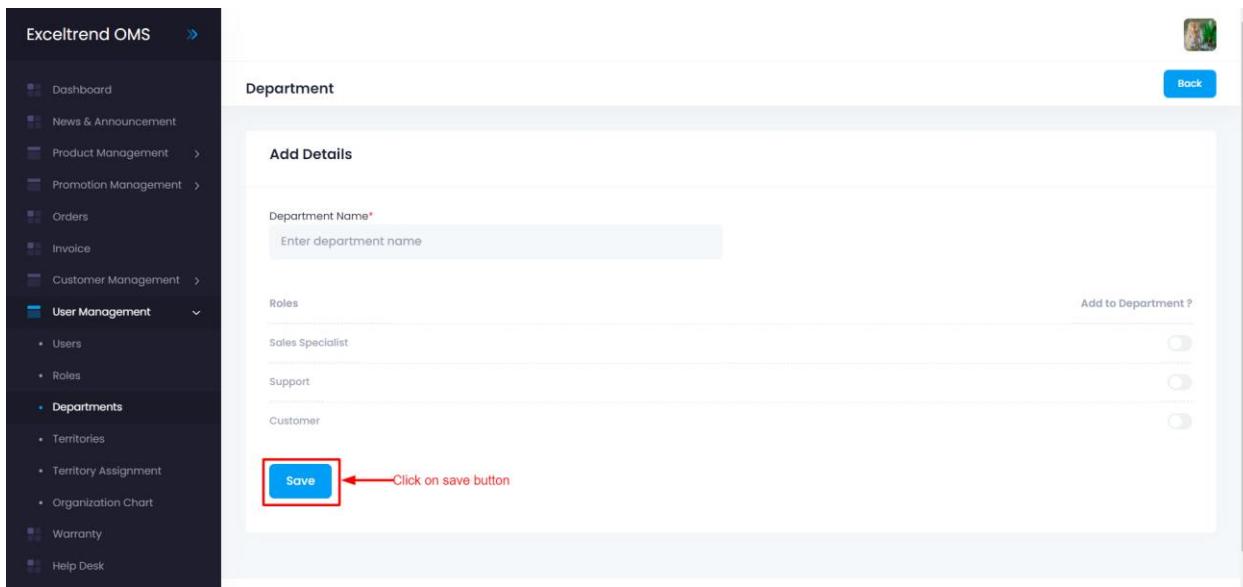
- Steps 1: - Click on a create button.



- 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.

The screenshot shows the 'Department' list page in the Exceltrend OMS. The sidebar on the left is titled 'Exceltrend OMS' and includes a navigation menu with items like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (selected), Departments, Territories, Territory Assignment, Organization Chart, Warranty, and Help Desk. The main content area is titled 'Department' and shows a table with columns: No., Name, Status, and Action. There are three records: Customer (Status: On), Sales (Status: On), and Support (Status: Off). In the 'Action' column for the 'Customer' record, there is a pencil icon with a red box around it, and a tooltip says 'Click on pencil icon'.

No.	Name	Status	Action
1	Customer	On	
2	Sales	On	
3	Support	Off	-

- Steps 2: - Update the data.

The screenshot shows the 'Update Details' page for a department. The sidebar on the left is the same as the previous screenshot. The main content area is titled 'Update Details' and contains a form. The 'Department Name*' field is filled with 'Customer'. Under the 'Roles' section, there is a list of roles: Sales Specialist, Support, and Customer. The 'Customer' role has a blue switch button next to it, which is turned on. To the right of the roles, there is a 'Add to Department ?' section with two other roles listed: Sales Specialist and Support, each with a blue switch button that is turned off. At the bottom of the form is a blue 'Update' button.

- Steps 3: - Click on update button.

Department

Update Details

Department Name*
Customer

Roles

Sales Specialist
Support
Customer

Add to Department ?

Customer

Update ← Click on update button

7.3.3 Steps: - How to view the department.

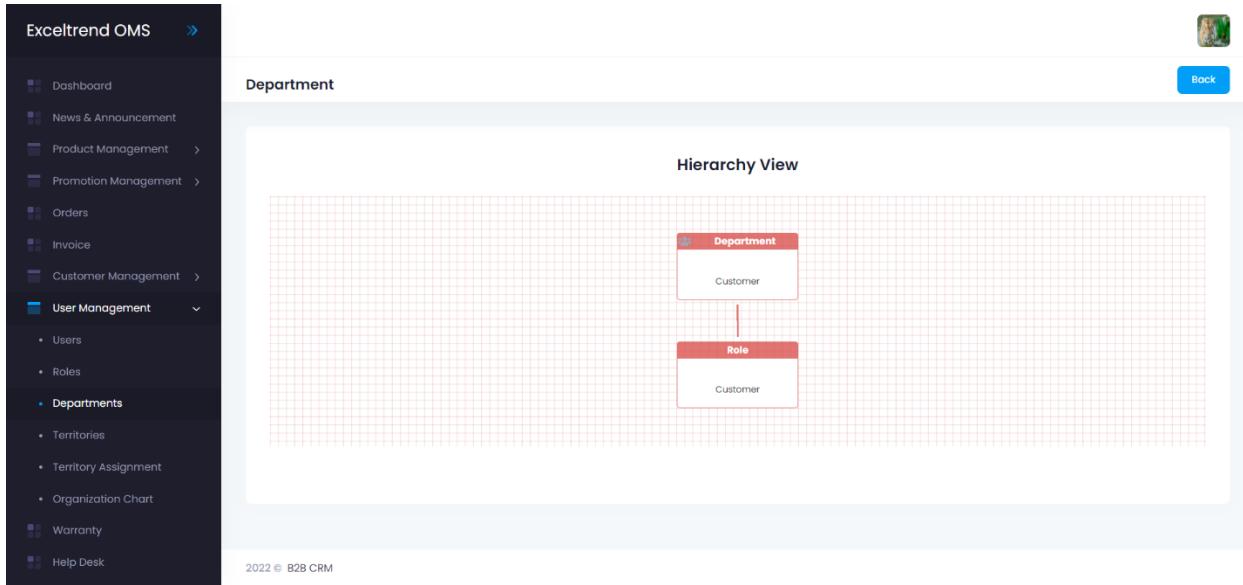
- Steps 1: - Click on eye icon.

Department

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

Showing 1 to 3 of 3 records

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

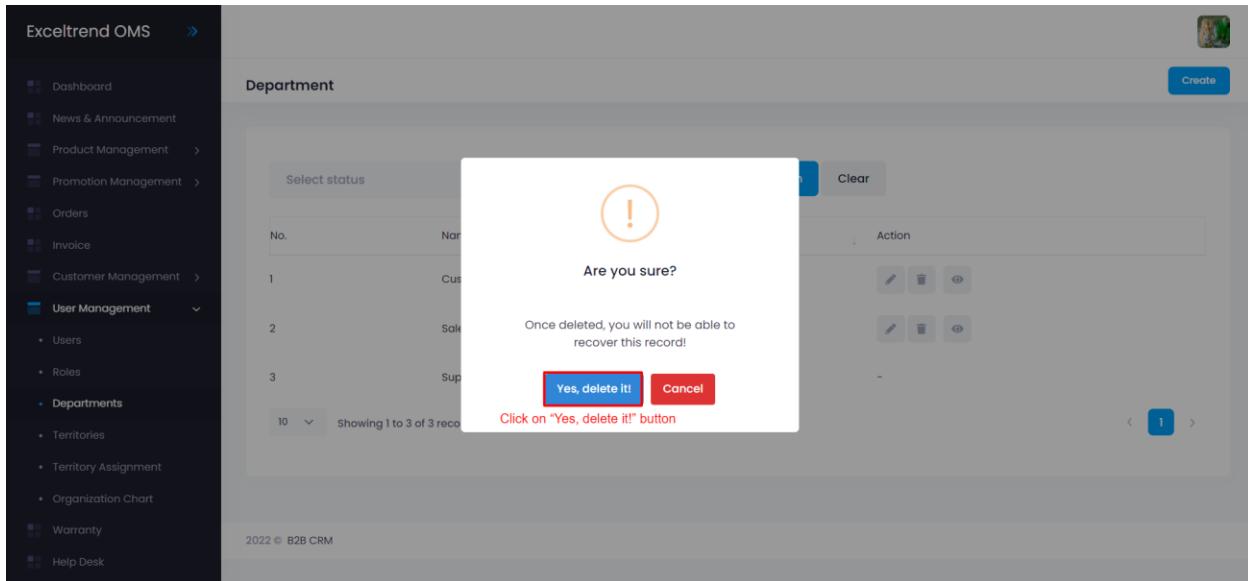


7.3.4 Steps: - How to delete the department.

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

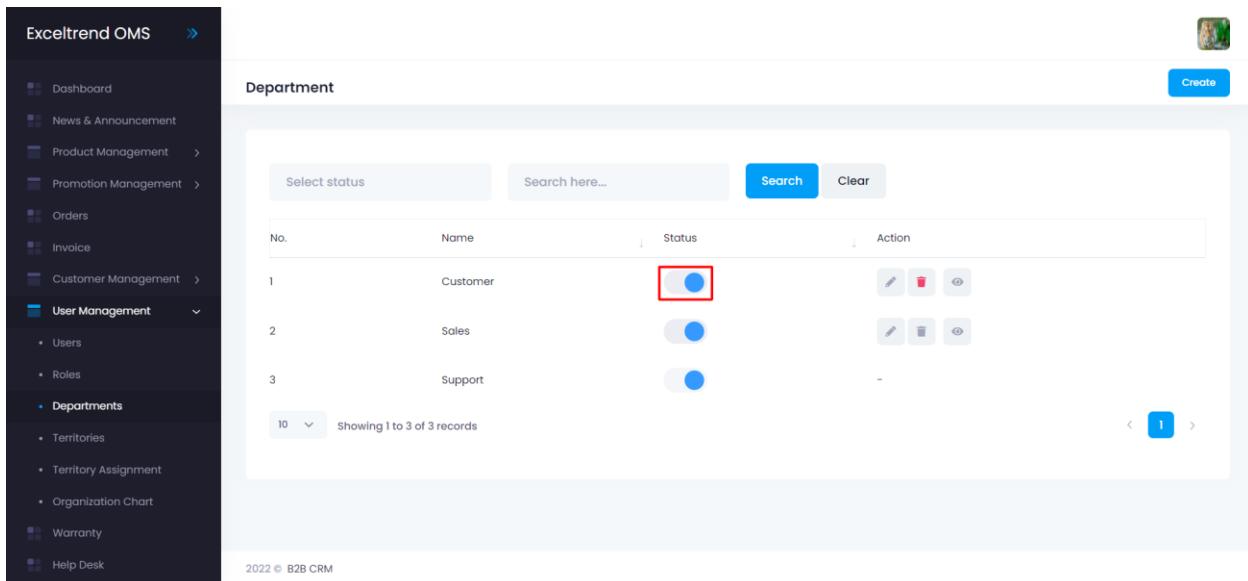
The screenshot shows the 'Department' list page. The interface is similar to the previous one, with the same sidebar and main area. The main area now displays a table with three rows of department data. The columns are 'No.', 'Name', 'Status', and 'Action'. The 'Action' column contains icons for edit, delete, and details. A red box highlights the delete icon for the first row, with a red arrow pointing to it and the text 'Click on trash icon'. At the bottom of the table, there is a message 'Showing 1 to 3 of 3 records' and a small navigation area.

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

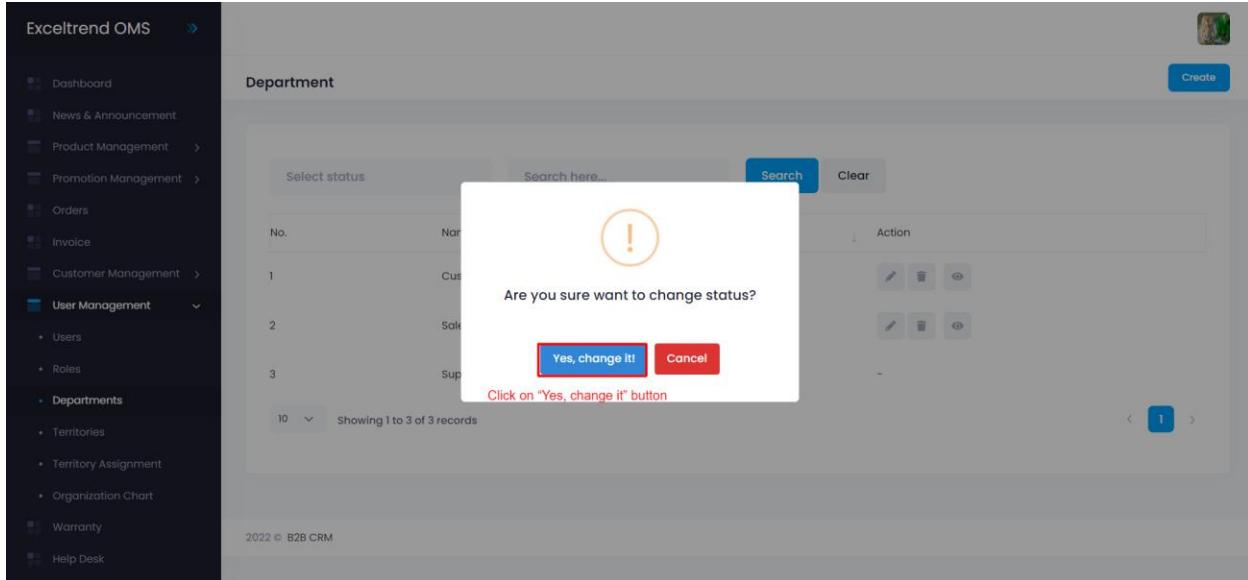


7.3.5 Steps: - How active and inactive the department.

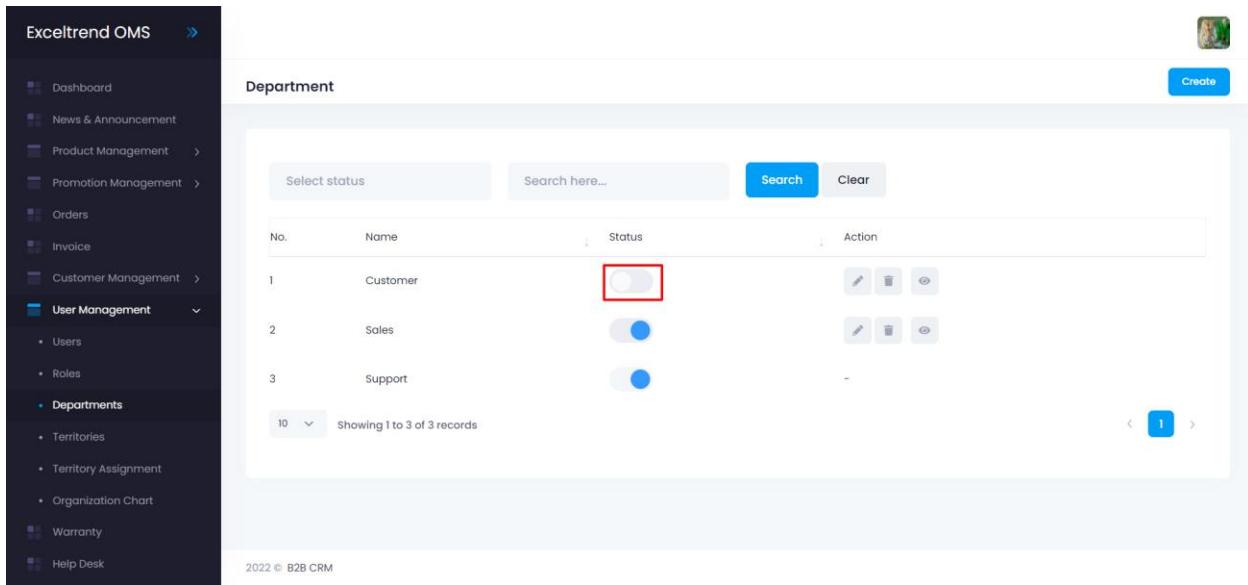
- Steps 1: - Click on Active status and appear to one pop-up model.



- 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/ipYCD2ITQd2>

7.4.1 Steps: - How sync the territories.

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

Sync Territories

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	ILOIO 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.

Are you sure want to sync Territories?

Syncing process will run in background and it may take some time to sync all Territories Data.

Yes, do it! Cancel

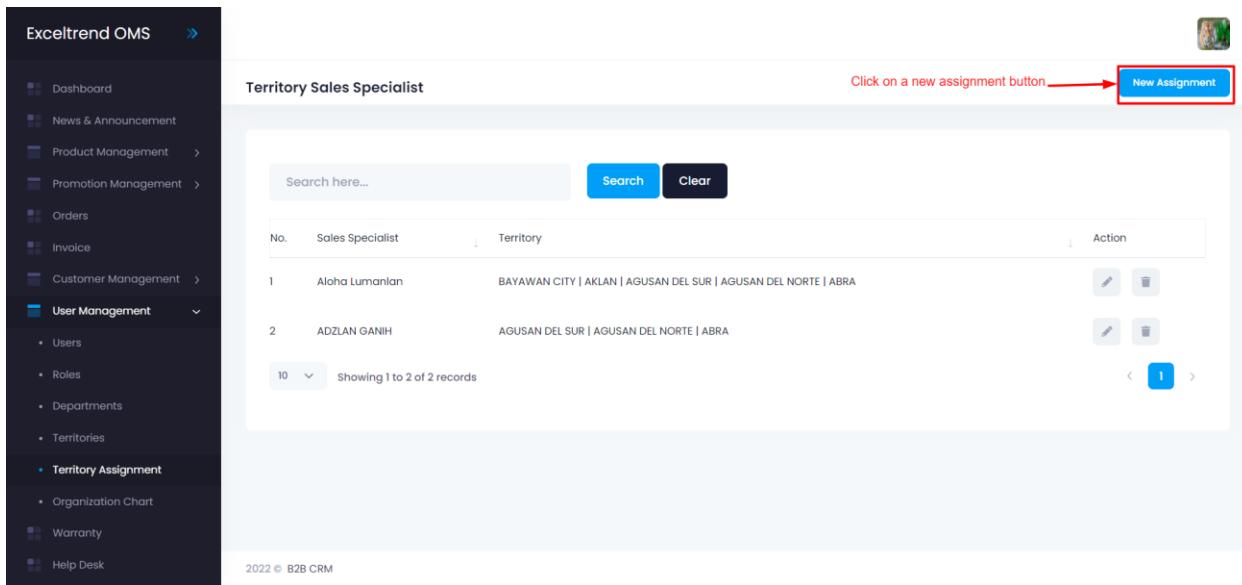
Click on "Yes, do it!" button

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>

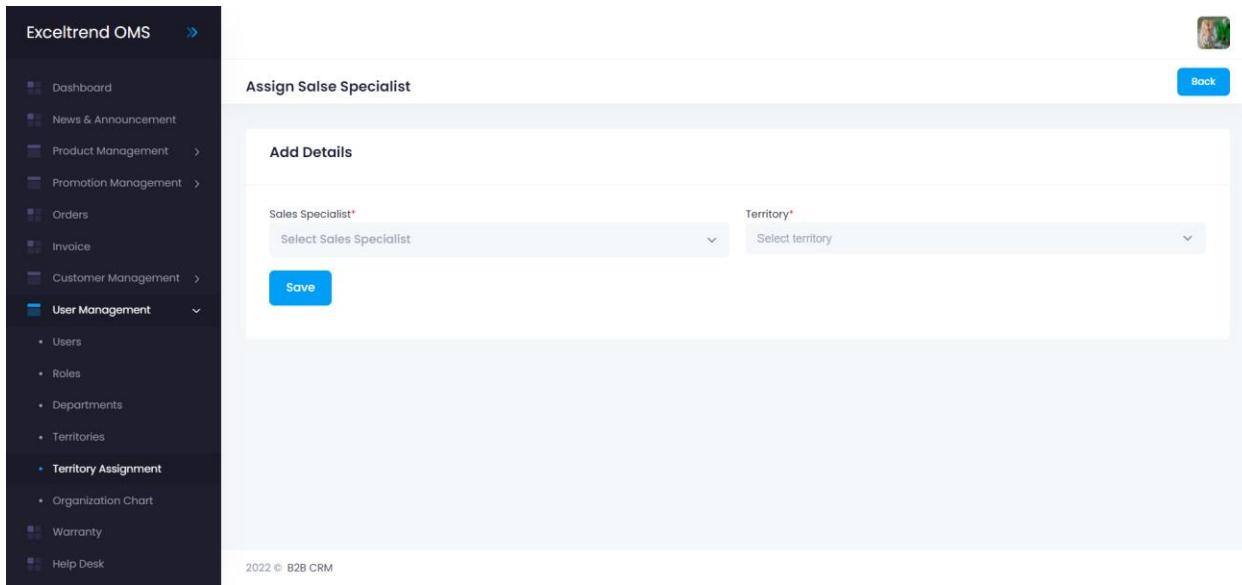
7.5.1 Steps: - How to create a new assignment.

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



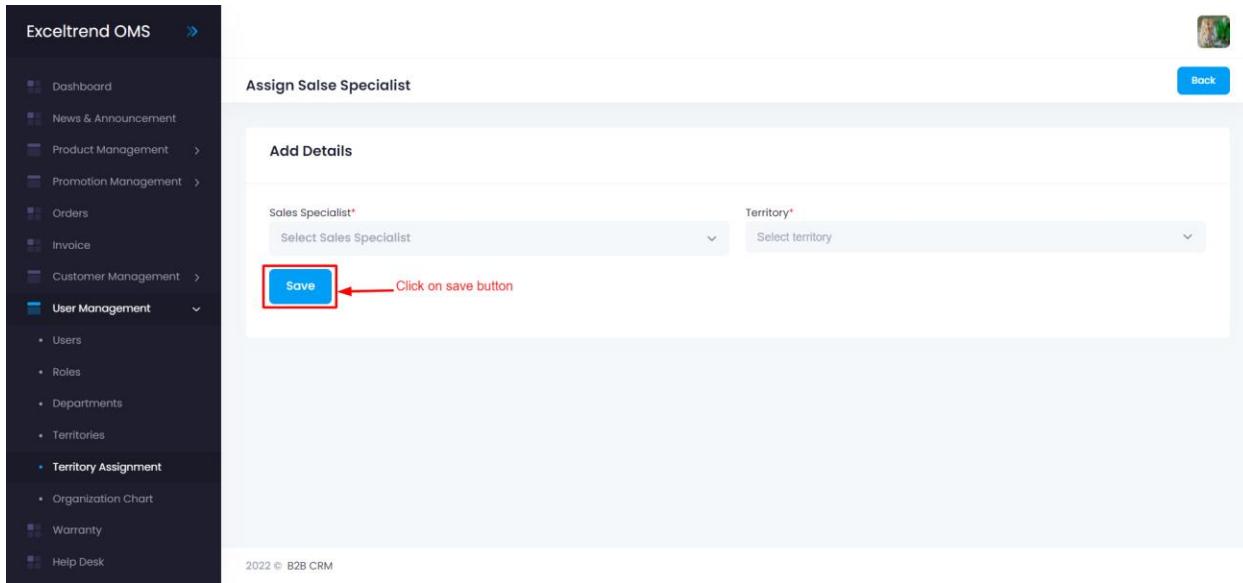
The screenshot shows the Exceltrend OMS application. On the left is a dark sidebar menu with various management options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (selected), Territory Assignment, Organization Chart, Warranty, and Help Desk. The main area is titled 'Territory Sales Specialist'. It features a search bar with 'Search' and 'Clear' buttons. Below the search is a table with columns 'No.', 'Sales Specialist', and 'Territory'. Two records are listed: '1 Aloha Lumanlan BAYAWAN CITY | AKLAN | AGUSAN DEL SUR | AGUSAN DEL NORTE | ABRA' and '2 ADZLAN GANIH AGUSAN DEL SUR | AGUSAN DEL NORTE | ABRA'. At the bottom of the table is a pagination bar showing '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.



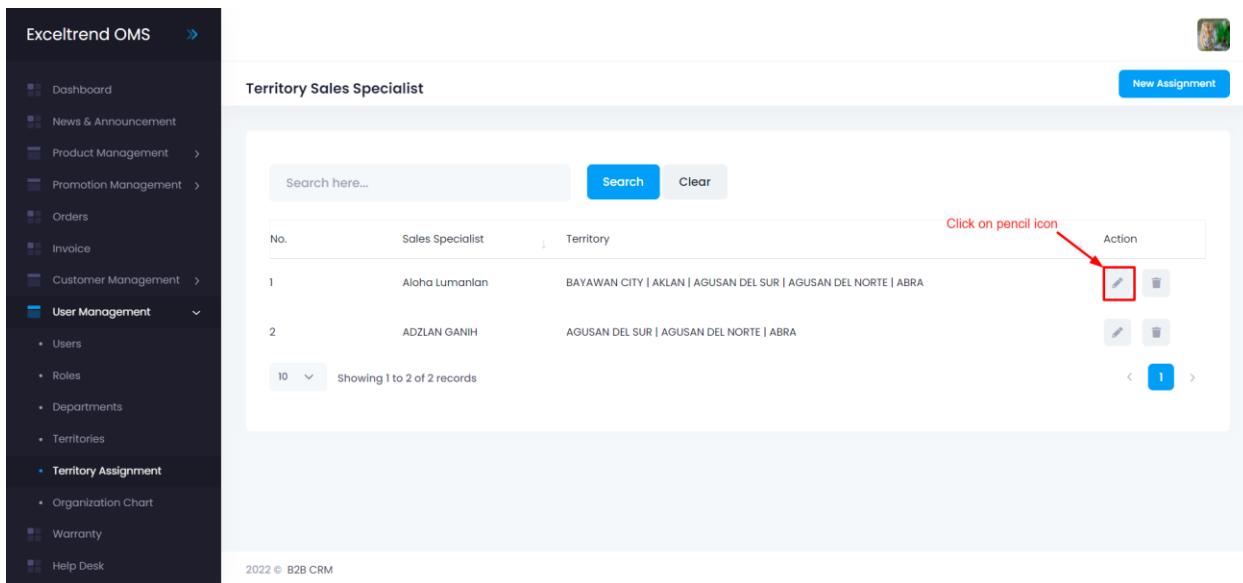
The screenshot shows a modal dialog box titled 'Assign Sales Specialist'. The title bar has a close button and a 'Back' button. The main area is titled 'Add Details'. It contains two dropdown fields: 'Sales Specialist*' and 'Territory*'. Both dropdowns have a placeholder 'Select Sales Specialist' and 'Select territory'. At the bottom left of the dialog is a blue 'Save' button.

- Steps 3: - Click on save button.

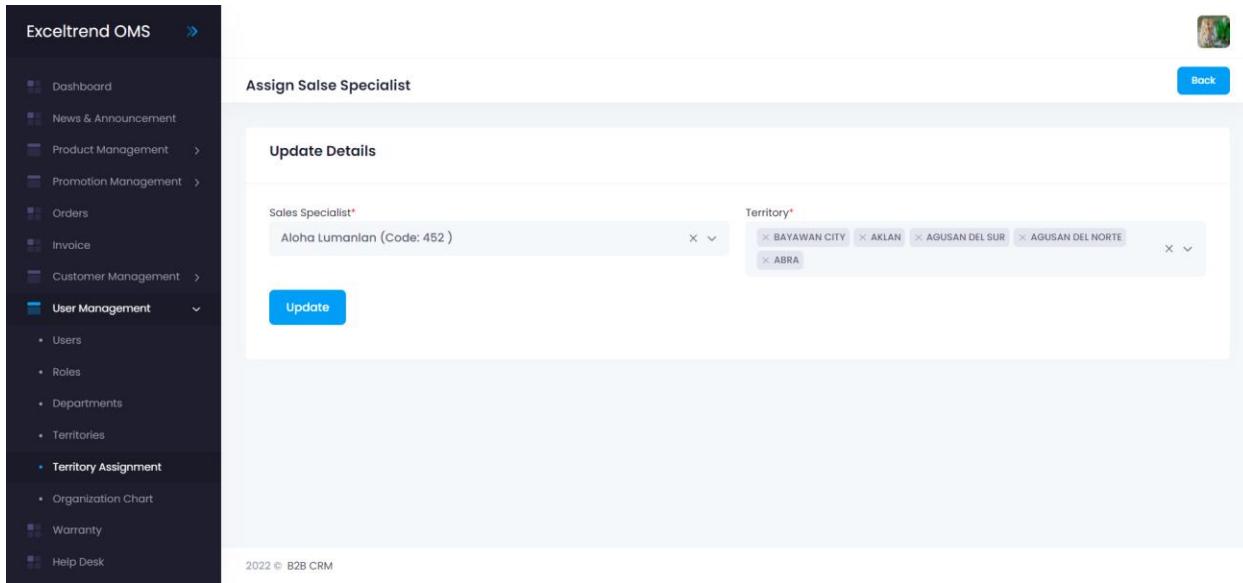


7.5.2 Steps: - How to edit an assignment.

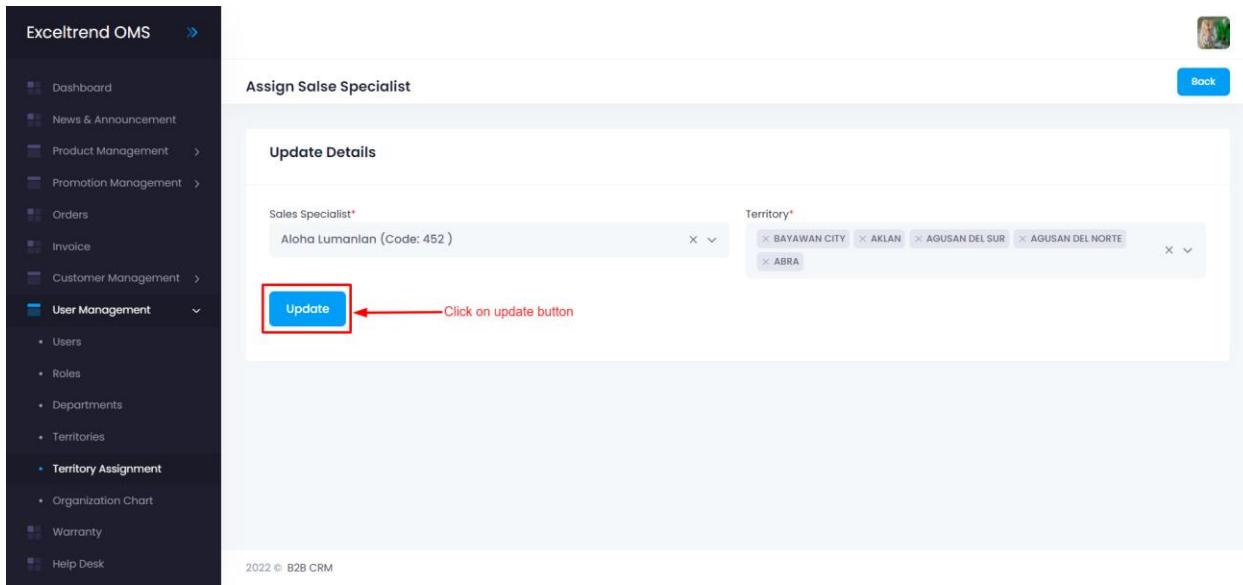
- Steps 1: - Click on pencil icon.



- 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.

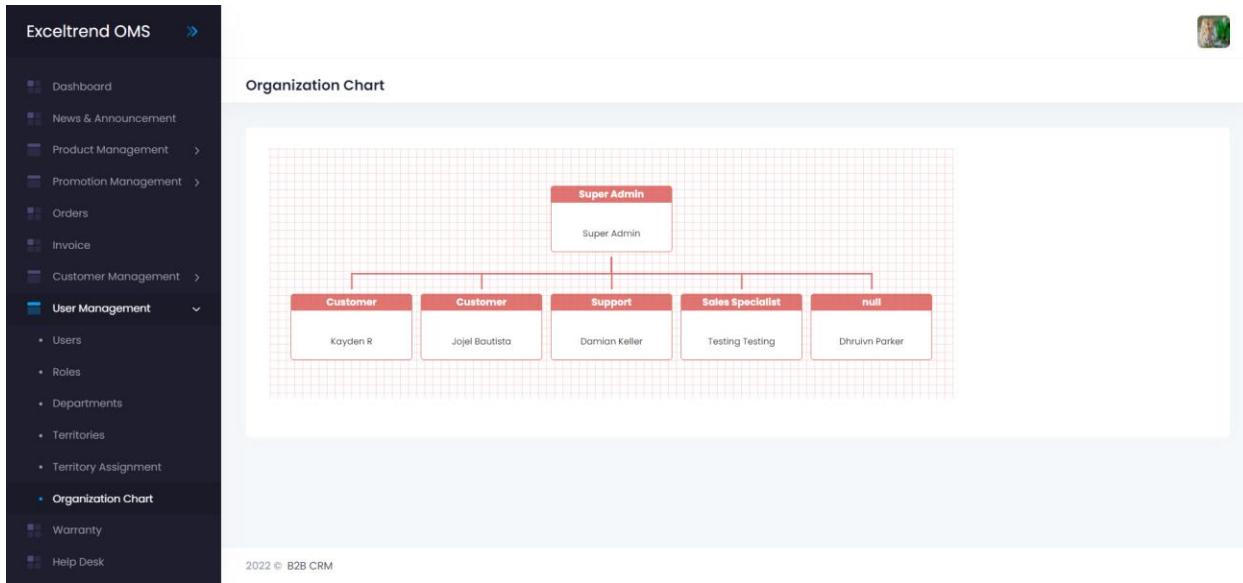
The screenshot shows the 'Territory Sales Specialist' page. On the left is a dark sidebar with various menu items under 'User Management'. The main area displays a table with two records. The first record is 'Aloha Lumanlan' from 'BAYAWAN CITY | AKLAN | AGUSAN DEL SUR | AGUSAN DEL NORTE | ABRA'. The second record is 'ADZLAN GANIH' from 'AGUSAN DEL SUR | AGUSAN DEL NORTE | ABRA'. In the 'Action' column for the second record, there is a trash icon with a red box around it and a red arrow pointing to it, labeled '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.

The screenshot shows the same 'Territory Sales Specialist' page. A confirmation dialog box is overlaid on the screen. It features a large exclamation mark icon at the top, followed by the question 'Are you sure?'. Below the question, it states 'Once deleted, you will not be able to recover this record!'. At the bottom of the dialog box are two buttons: 'Yes, delete it!' and 'Cancel'. The 'Yes, delete it!' button is highlighted with a red box and a red arrow pointing to it, labeled '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: -

8.1 Steps: - How to edit the warranty.

- Steps 1: - Click on edit icon.

The screenshot shows the 'Warranty' management screen in the Exceltrend OMS system. The interface includes a sidebar with navigation links and a main table area. The table has columns for No., Ref No., Business Unit, Customer Name, Claim Type, Dealer Name, Date Time, and Action. Two rows of data are visible. A red box highlights the edit icon (pencil symbol) in the 'Action' column of the first row. The left sidebar includes a 'Warranty' link under the 'User Management' section.

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

- Steps 2: - Update the data.

Back

Warranty

Update Details

Date*	Type of Warranty Claim*
February 22, 2022	Treadware
Customer Name*	PATACISIL, DARWIN
Customer Email*	eDSB2-2@mailinator.com
Customer Location*	US
Customer Address*	US
Dealer's Name*	Ron Parker
Dealer's Location*	US
Dealer's Fax	Dealer's Telephone*
Enter dealer's fax	8574201245

Tire & Vehicle Info

Vehicle Maker*	Year*
Illo	2020
Vehicle Model*	License Plate*
Sport	XY25U412
Vehicle Mileage*	
10	

PC/LT Tire Position

<input checked="" type="checkbox"/> LF	<input checked="" type="checkbox"/> RF	<input checked="" type="checkbox"/> LR	<input checked="" type="checkbox"/> RR
Tire Mileage	Front	Drive	Trailer
Enter tire mileage	Enter tire mileage	Enter tire mileage	Enter tire mileage

2 Wheels/TB Tire Position

<input checked="" type="checkbox"/> Front	<input checked="" type="checkbox"/> Drive	<input checked="" type="checkbox"/> Trailer
Tire Mileage	Enter tire mileage	Enter tire mileage
Enter tire serial no.	Enter 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. Abnormal 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:

- Circles 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.
- 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 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. • Distortion of the tread plies. • Internal tread cuts or punctures. • Faulty repair. 	<input type="checkbox"/>	<input checked="" type="checkbox"/>

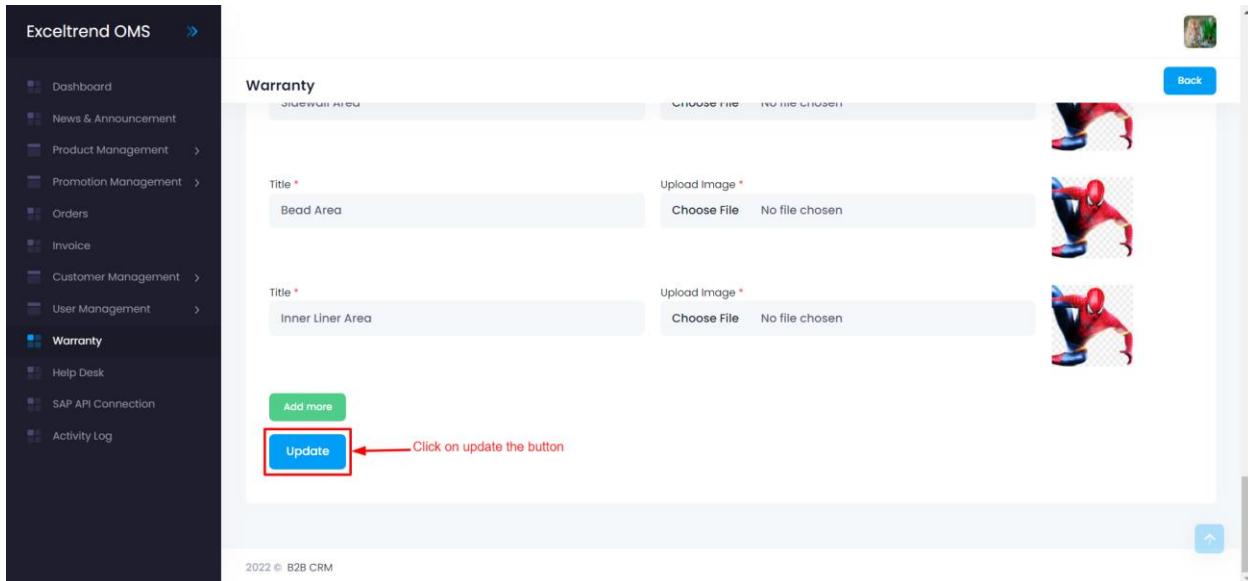
Pictures of the Tire focusing on Damage Areas

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](#)

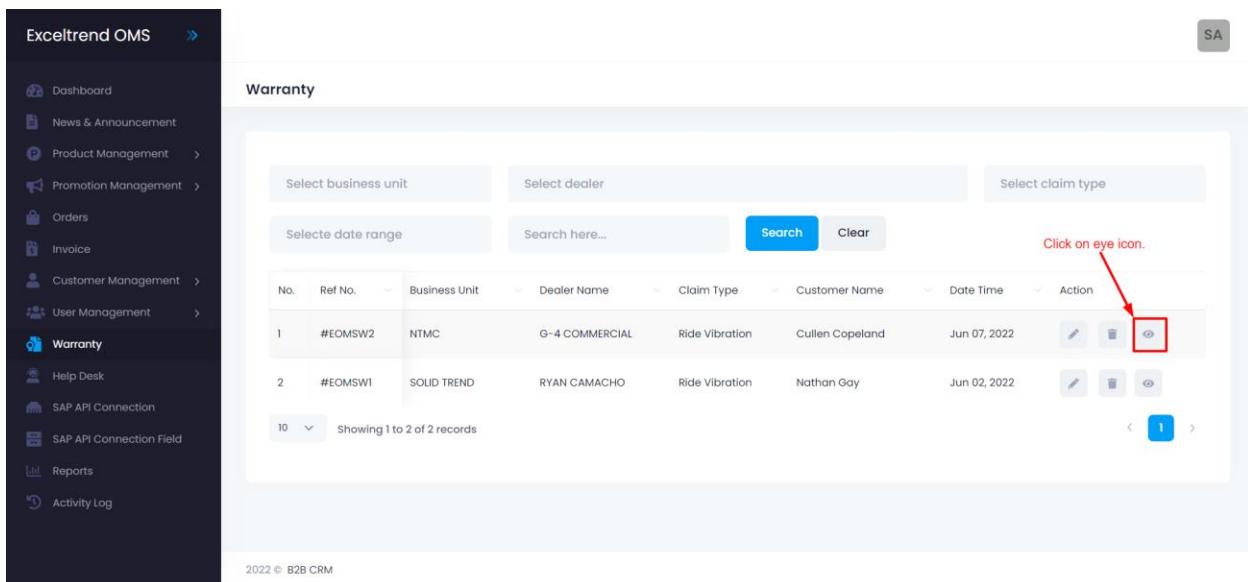
[Update](#)

- 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.

Exceltron OMS

Warranty

View Details

Date-Time:	2023-09-09 09:09:09
Type of Warranty Claim:	INFORMATION
Ref No.:	AEOMSW2
Business Unit:	AHSSW
Customer Name:	FATACIL DARWIN
Customer Email:	w0592_2@gmail.com
Customer Phone:	9714587544
Customer Location:	US
Customer Telephone:	9714587544
Customer Address:	US
Dealer Name:	Han Motor
Dealer Location:	US
Dealer Telephone:	0524201249
Dealer Fax:	-

Tire & Vehicle Info

Vehicle Make:	TO
Vehicle Model:	Sport
Vehicle Mileage:	10
Year:	2020
License Plate:	EX00000
P/C/LT Tire Position:	FR, RR, LR, RL
P/C/LT Tire Mileage:	-
P/C/LT Tire Serial No.:	-
2 Wheels/TB Tire Position:	Front, Drive, Tread
2 Wheels/TB Tire Mileage:	-
2 Wheels/TB Tire Serial No.:	-
Reason for the return:	Quality not good
Location of damage:	Tread, sidewall

Claim Points

Question	Answer
1. Wearing (shoulder wear, center wear, one-sided wear, or any irregular wear on tread)	
Shoulder	NO
Center	YES
One-Sided	NO
Irregular	YES
2. Any sign of cuts or punctures on the tire - Indicate if penetrated or not.	
Penetrated	NO
Not Penetrated	NO
3. If this tire is repaired, indicate if the repair is hot process or cold patch.	
Hot Process	NO
Cold Process	YES
4. Alteration or impact marks near the complaint area of the tread/shoulder, sidewall, bead areas.	
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 (concentric or not)	NO
- deformation on the bead (irregular or any sign of improper bead seating)	NO
evidence of bead twisting and bead rubber settlement	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
leak of chemicals or oil used during tire mounting	YES
6. Inner liner manifestations:	
- signs of cutouts or stress cracks	NO
- Improper repair or repair failure	NO
- inner liner cracks near the bead area of the damage	NO
- any sign of running the tire in underrated condition.	NO

Tire Manifestation Probable Cause

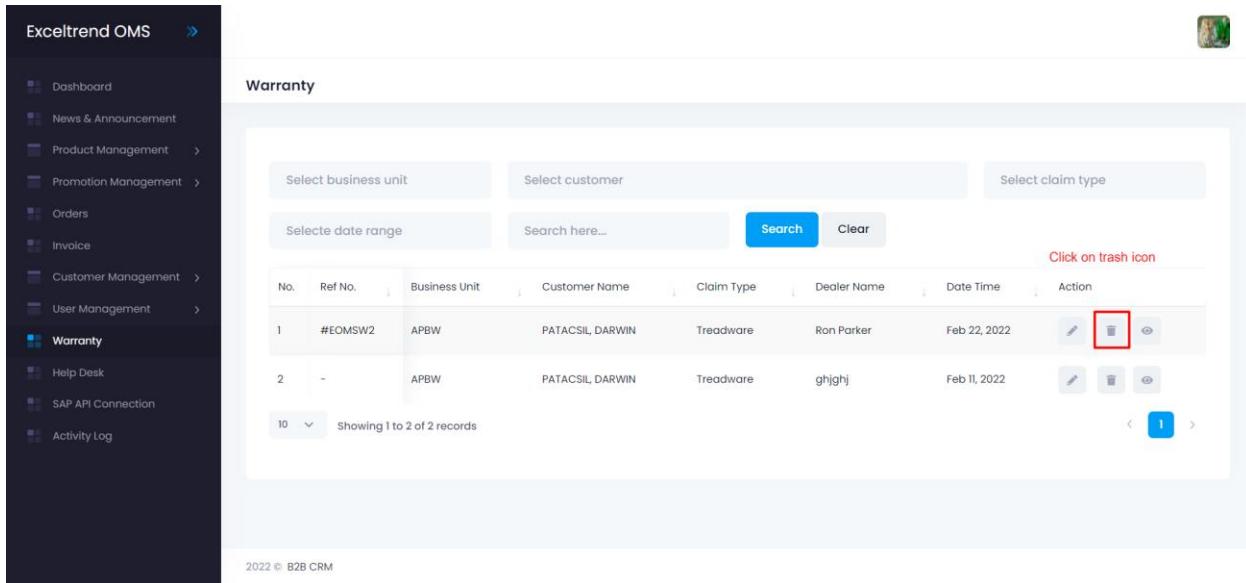
No.	Image	Description	Probable Cause(s)	Answer
1.		Deformation or bulging of the tread.	<ul style="list-style-type: none"> Deformation or bulging of the tread between tread piles & rubber chemical reaction between two different types of heat build-ups. Deformation of tread piles. Incorrect tread cutting postures. 	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	

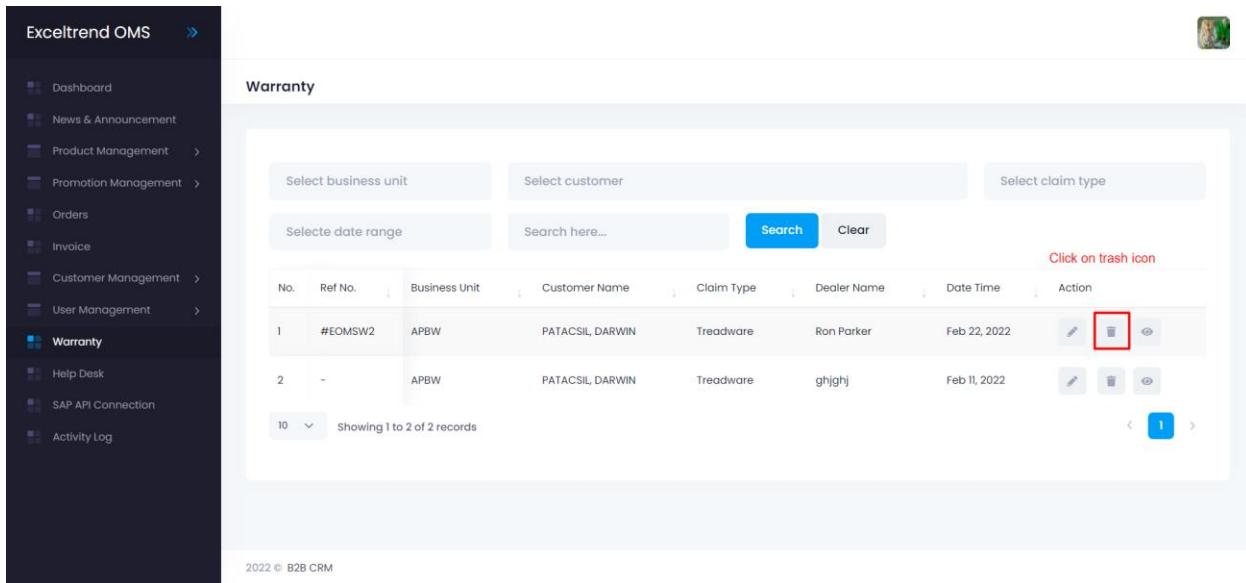
8.3 Steps: - How to delete the warranty.

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



The screenshot shows the Exceltrend OMS interface with the 'Warranty' module selected. The main page title is 'Warranty'. On the left, there's a sidebar with various navigation options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Help Desk, SAP API Connection, and Activity Log. The 'Warranty' option is also listed here. The main content area has search filters for 'Select business unit', 'Select customer', and 'Select claim type', along with date range and search buttons. Below these is a table listing two warranty claims. The columns are No., Ref No., Business Unit, Customer Name, Claim Type, Dealer Name, Date Time, and Action. The first claim (No. 1, Ref No. #EOMSW2) has its delete icon highlighted with a red box. The second claim (No. 2, Ref No. -) also has its delete icon highlighted. At the bottom, 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.



This screenshot is identical to the one above, showing the 'Warranty' page in the Exceltrend OMS. The 'Action' column for the first claim (#EOMSW2) is highlighted with a red box, indicating that the delete operation is currently being performed or has been initiated.

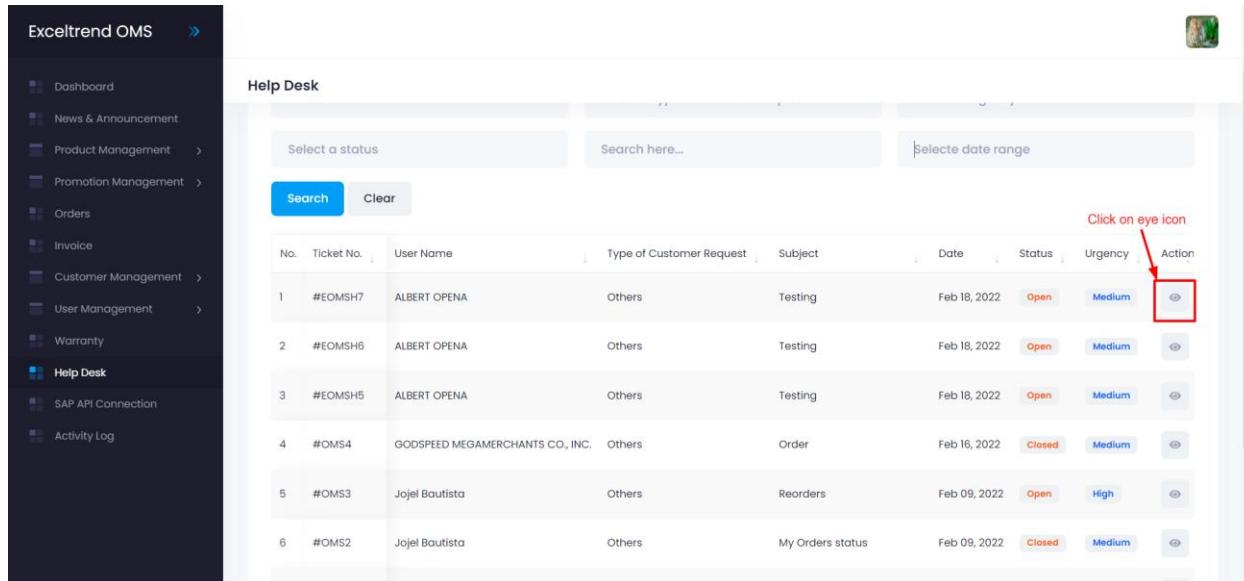
9. Help Desk: -

- 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.



The screenshot shows the Exceltrend OMS interface with the 'Help Desk' module selected. On the left is a dark sidebar with various menu items. The main area is titled 'Help Desk' and contains a table of ticket records. The table has columns for No., Ticket No., User Name, Type of Customer Request, Subject, Date, Status, Urgency, and Action. An eye icon is located in the 'Action' column of the first row. A red box and a red arrow point to this eye icon with the text '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 18, 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.

Exceltrend OMS

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

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?
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:


9.2 Steps: - How to update the ticket status.

- Steps 1: - Click on eye icon.

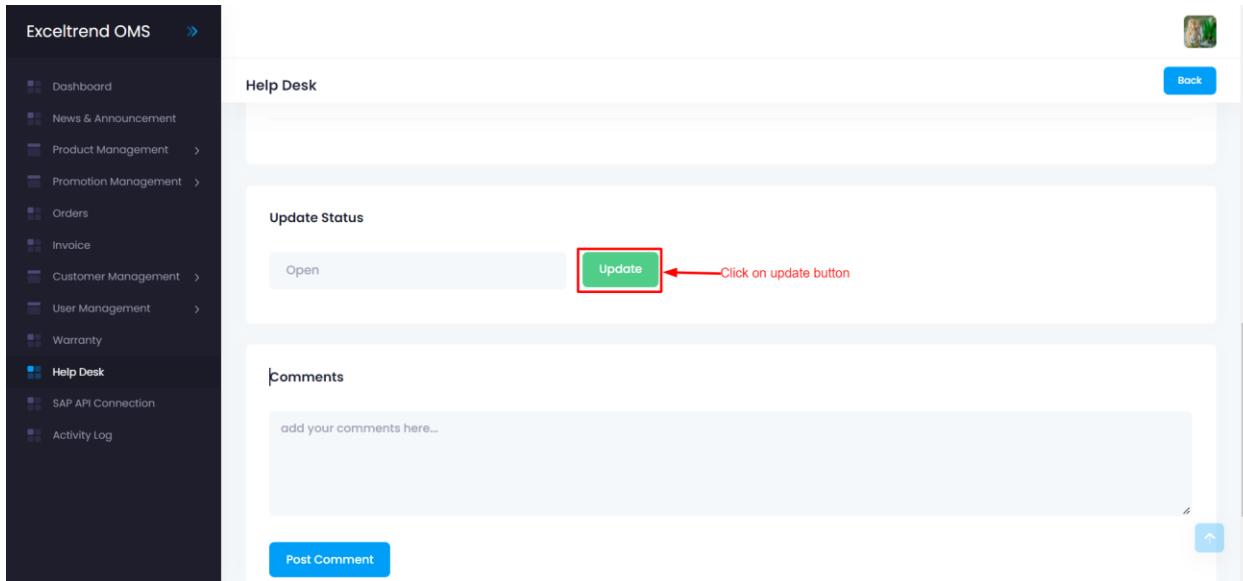
The screenshot shows the Exceltrend OMS interface with the 'Help Desk' module selected. On the left is a dark sidebar with various management options like Product Management, Promotion Management, and Help Desk. The main area is titled 'Help Desk' and contains a table of tickets. The columns include No., Ticket No., User Name, Type of Customer Request, Subject, Date, Status, Urgency, and Action. The 'Action' column features an eye icon in each row, which is highlighted with a red box and a callout 'Click on eye icon'. The table has six rows of ticket data.

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	

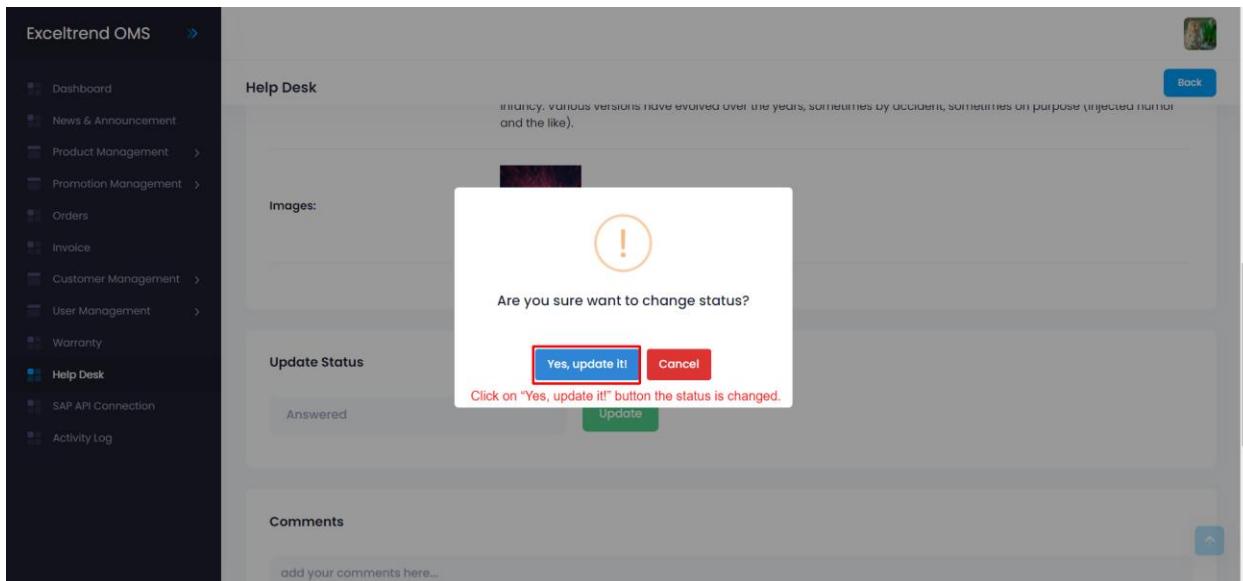
- Steps 2: - Select the status.

This screenshot shows a modal window titled 'Update Status' overlying the main Help Desk page. The modal has a dropdown menu where 'Open' is currently selected. A red box highlights this selection. To the right of the dropdown, a green 'Update' button is visible. Below the dropdown, a list of other status options is shown: 'In Progress', 'Answered', and 'Closed', each with a small blue indicator. A callout 'Select the status.' points to the dropdown menu. At the bottom of the modal is a '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.



9.3 Steps: - How to reply the ticket.

- Steps 1: - Click on eye icon.

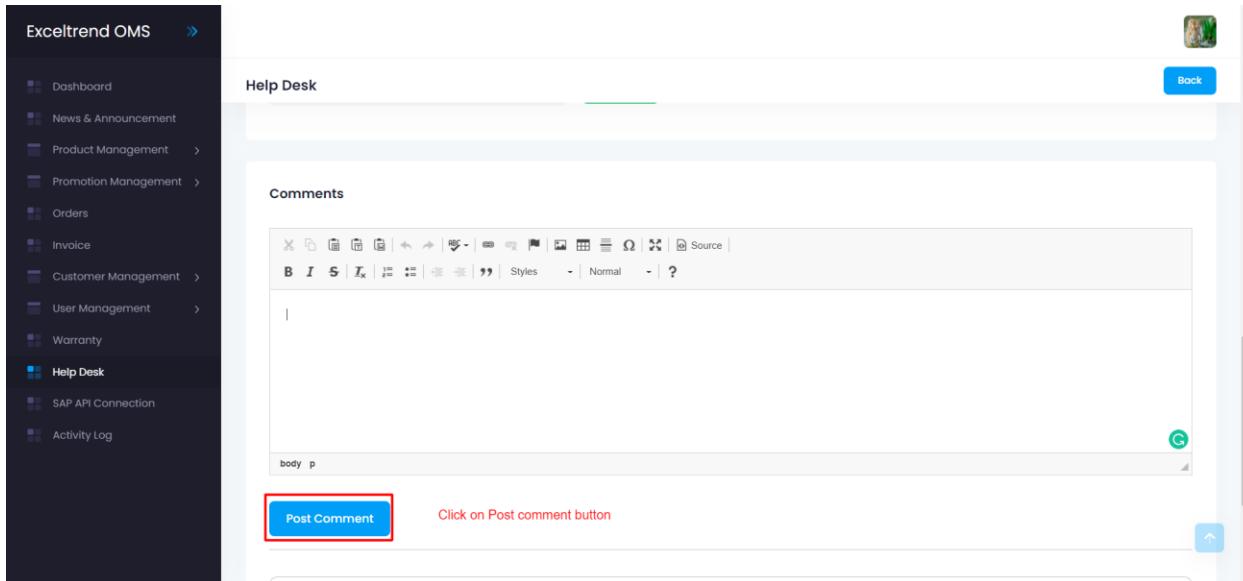
The screenshot shows the Exceltrend OMS Help Desk interface. On the left is a dark sidebar with various menu items: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk (which is selected and highlighted in blue), SAP API Connection, and Activity Log. The main area is titled "Help Desk" and contains a table of tickets. The table has columns: No., Ticket No., User Name, Type of Customer Request, Subject, Date, Status, Urgency, and Action. There are six rows of data. A red arrow points to the "Action" column of the first row, with the text "Click on eye icon" above it. The ticket details are as follows:

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 Exceltrend OMS Help Desk interface. The sidebar and title bar are identical to the previous screenshot. The main area is titled "Help Desk" and contains a "Comments" section. Below the title bar is a "Back" button. The "Comments" section has a rich text editor toolbar at the top. Below the toolbar is a text input field with the placeholder "Enter the message over here." and a code editor below it showing "body p". At the bottom of the comments section is a "Post Comment" button.

- Steps 3: - Click on Post comment button.

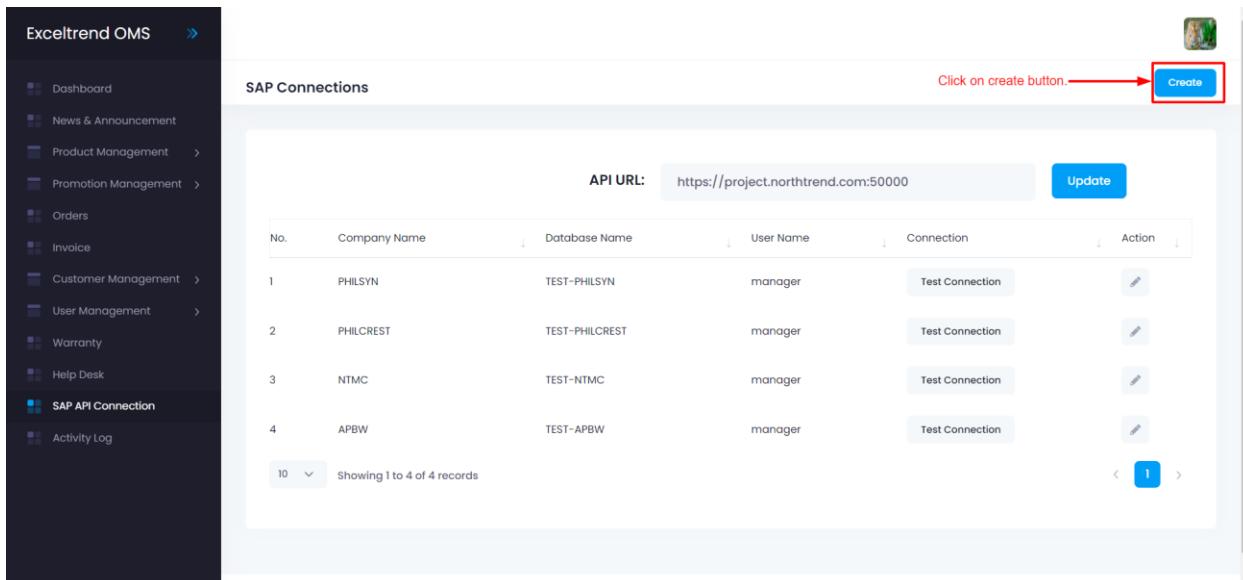


10. SAP API Connection: -

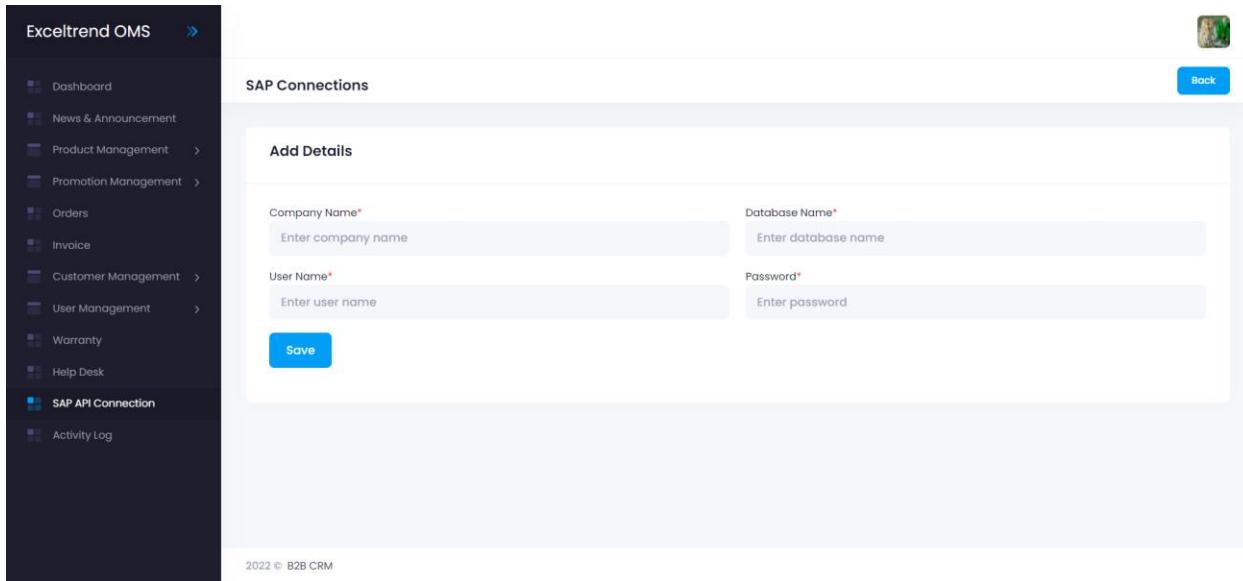
- Admin can create, edit and update the API connection.
- Admin can update the API URL.
- Video Link: - <https://www.screencast.com/t/sWiX10KbbKy>

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

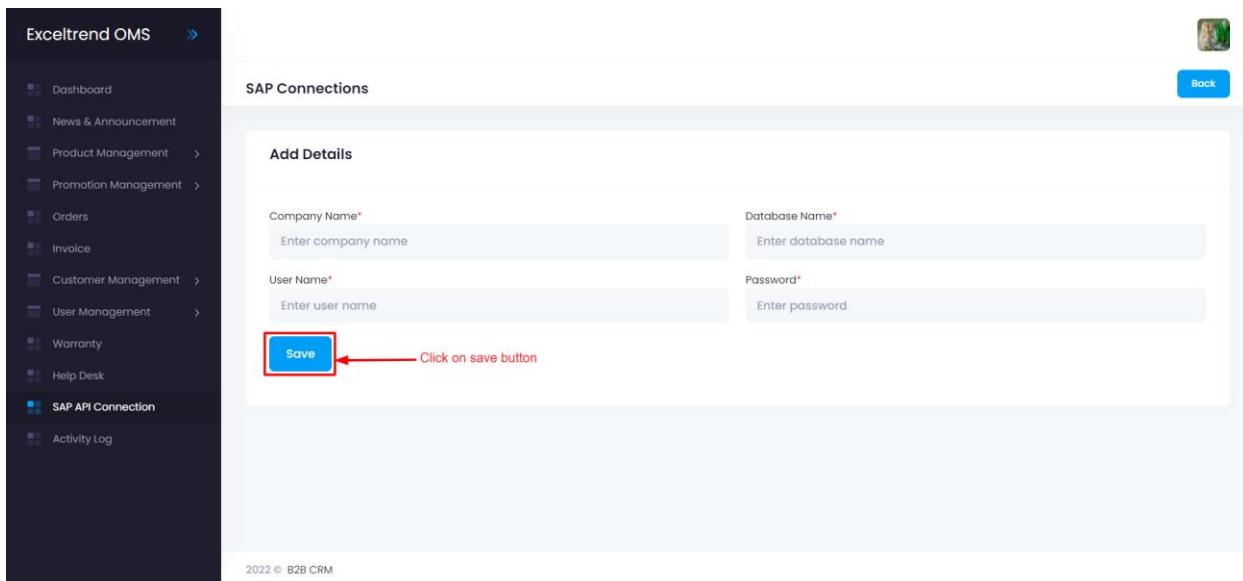
- Steps 1: - Click on create button.



- 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.

The screenshot shows the SAP Connections page within the Exceltrend OMS application. The left sidebar contains navigation 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>
2	PHILCREST	TEST-PHILCREST	manager	<button>Test Connection</button>
3	NTMC	TEST-NTMC	manager	<button>Test Connection</button>
4	APBW	TEST-APBW	manager	<button>Test Connection</button>

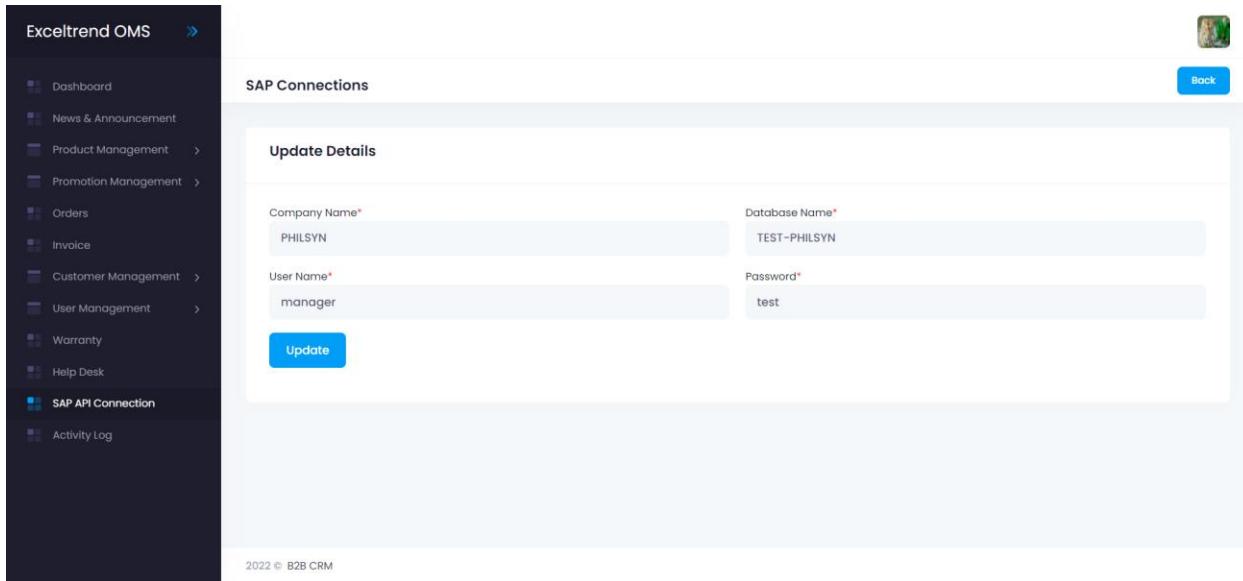
At the bottom of the table, it says "Showing 1 to 4 of 4 records". A blue "Update" button is located at the top right of the table area. A "Create" button is also visible at the top right of the main content area.

10.2 Steps: - How to edit the SAP API.

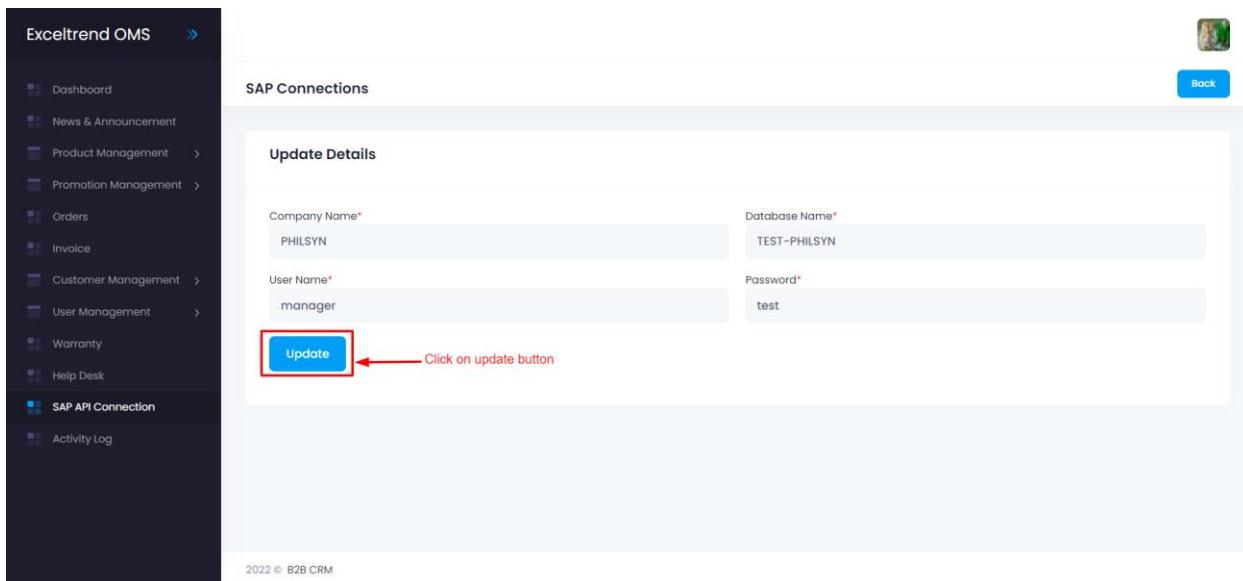
- Steps 1: - Click on pencil icon.

This screenshot is identical to the one above, showing the SAP Connections page in the Exceltrend OMS. However, a red box highlights the edit icon (pencil icon) for the first connection (PHILSYN). A red arrow points from the text "Click on pencil icon" to this highlighted icon. The rest of the interface and data are the same as the first screenshot.

- 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.

Exceltrend OMS

SAP Connection API Field

Sync All Create

Click on create button

No.	Business Unit	Field	Field Id	Table Name	Action
1	SOLID TREND	Product Application	26	OITM	
2	PHILSYN	Product Application	18	OITM	
3	PHILCREST	Product Application	18	OITM	
4	NTMC	Product Application	19	OITM	
5	APBW	Product Application	26	OITM	
6	SOLID TREND	Product Type	25	OITM	
7	PHILSYN	Product Type	14	OITM	

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

Select the business unit and field and enter the field id and table name.

Add Details

Business Unit* Select business unit

Field* Select field

Field Id* Enter field id

Table Name* Enter table name

Save

2022 © B2B CRM

- Steps 3: - Click on Save button.

SAP Connection API Field

Add Details

Business Unit*	Field*
Select business unit	Select field
Field Id*	Table Name*
Enter field id	Enter table name

Save

Click on Save button.

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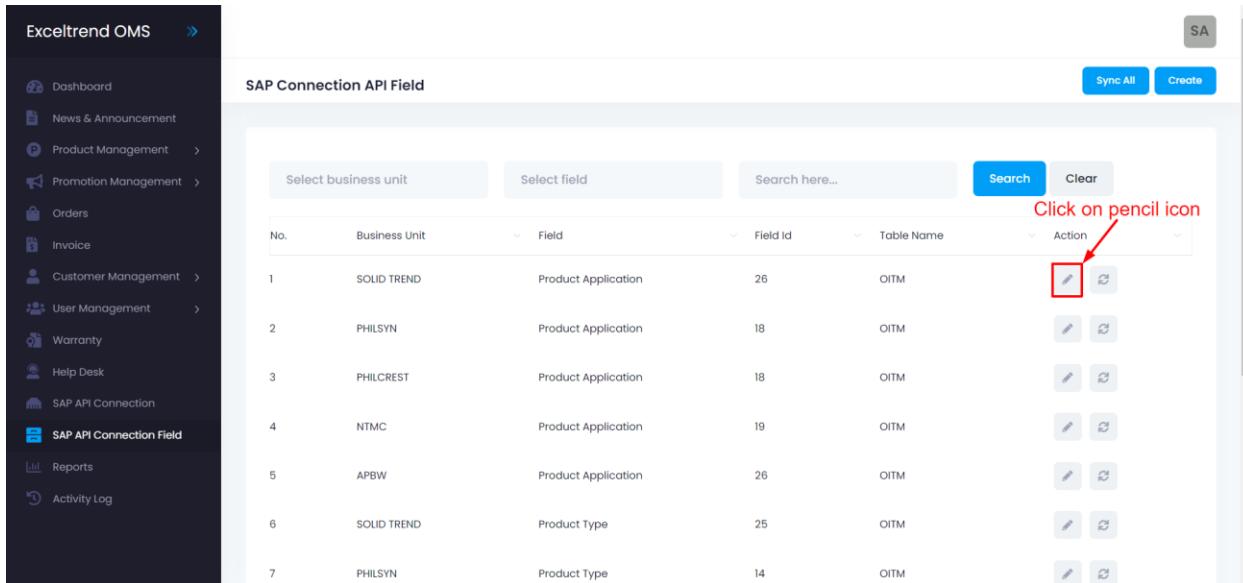
- Steps 4: - Created SAP connection API show on listing page.

SAP Connection API Field

No.	Business Unit	Field	Field Id	Table Name	Action
1	SOLID TREND	Product Application	26	OITM	
2	PHILSYN	Product Application	18	OITM	
3	PHILCREST	Product Application	18	OITM	
4	NTMC	Product Application	19	OITM	
5	APBW	Product Application	26	OITM	
6	SOLID TREND	Product Type	25	OITM	
7	PHILSYN	Product Type	14	OITM	

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

- Steps 1: - Click on pencil icon.

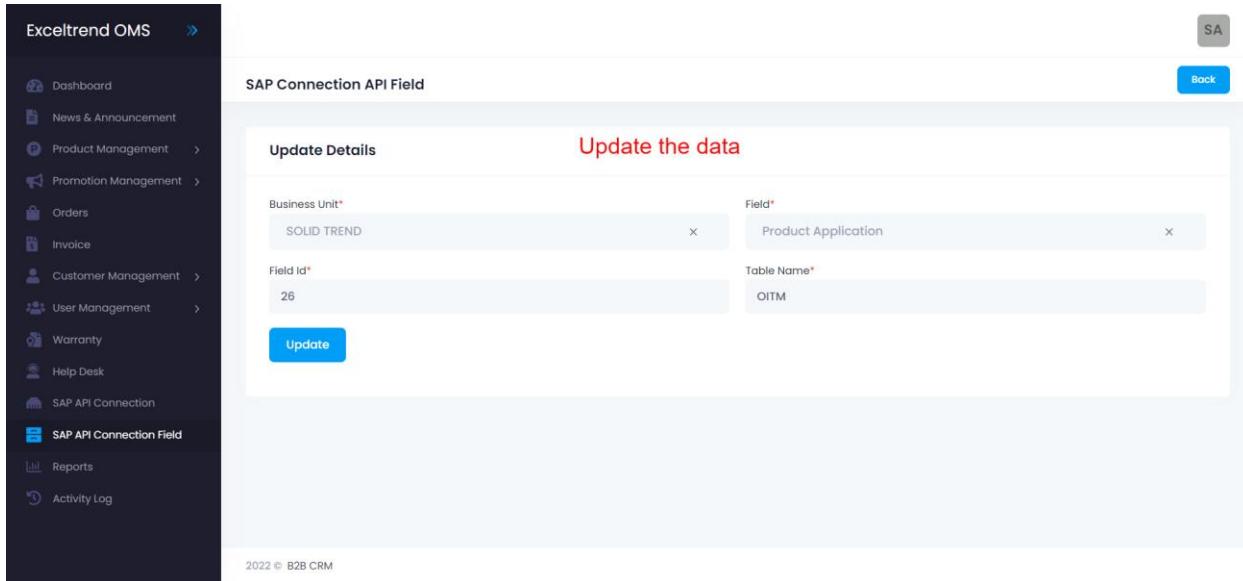


SAP Connection API Field

Search here... Search Clear

No.	Business Unit	Field	Field Id	Table Name	Action
1	SOLID TREND	Product Application	26	OITM	 
2	PHILSYN	Product Application	18	OITM	 
3	PHILCREST	Product Application	18	OITM	 
4	NTMC	Product Application	19	OITM	 
5	APBW	Product Application	26	OITM	 
6	SOLID TREND	Product Type	25	OITM	 
7	PHILSYN	Product Type	14	OITM	 

- Steps 2: - Update the data.



SAP Connection API Field

Back

Update Details

Business Unit* x

Field* x

Field Id* x

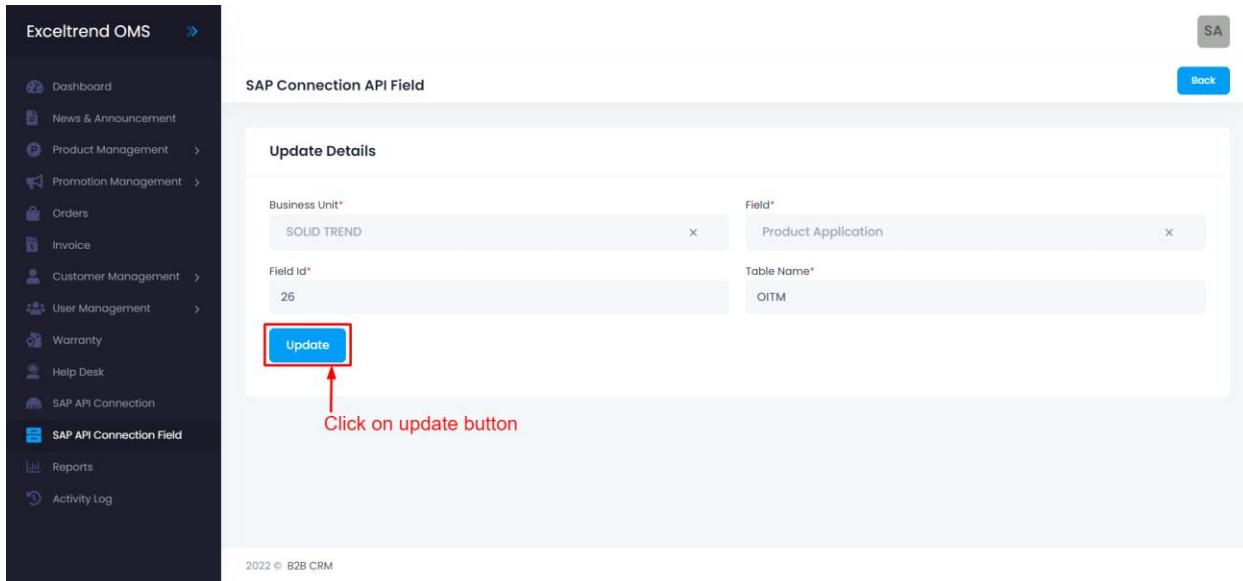
Table Name* x

Update

Update the data

2022 © B2B CRM

- Steps 3: - Click on update button.



12. Report: -

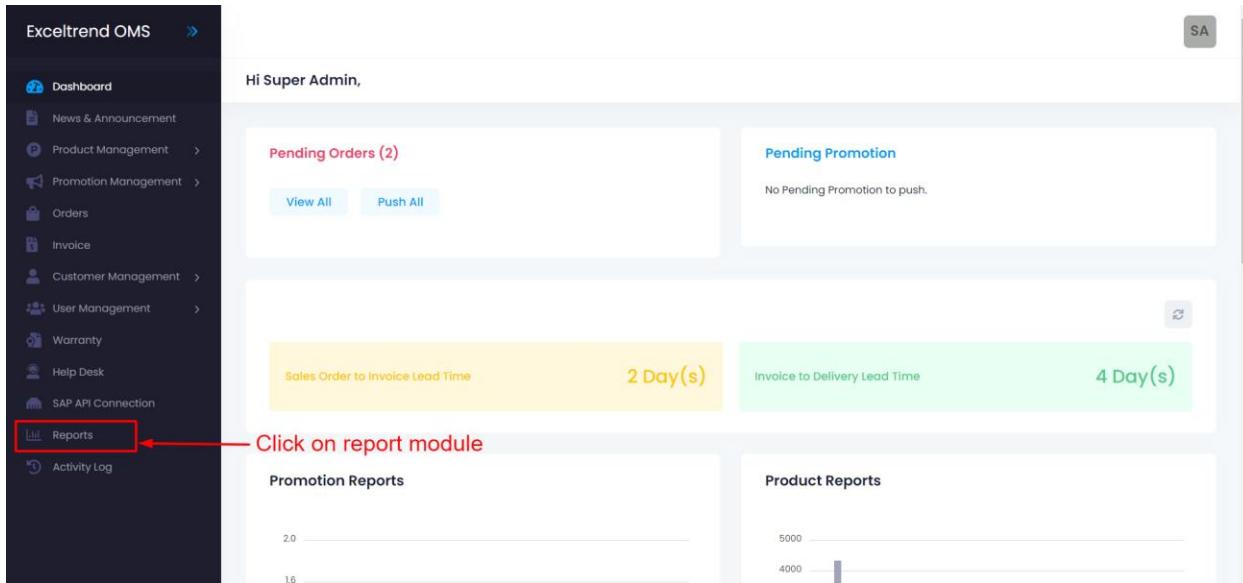
- Admin can see the all type of report in this module.
- Report module inside different type report show.
- Admin can show the all report in particular report page.

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.

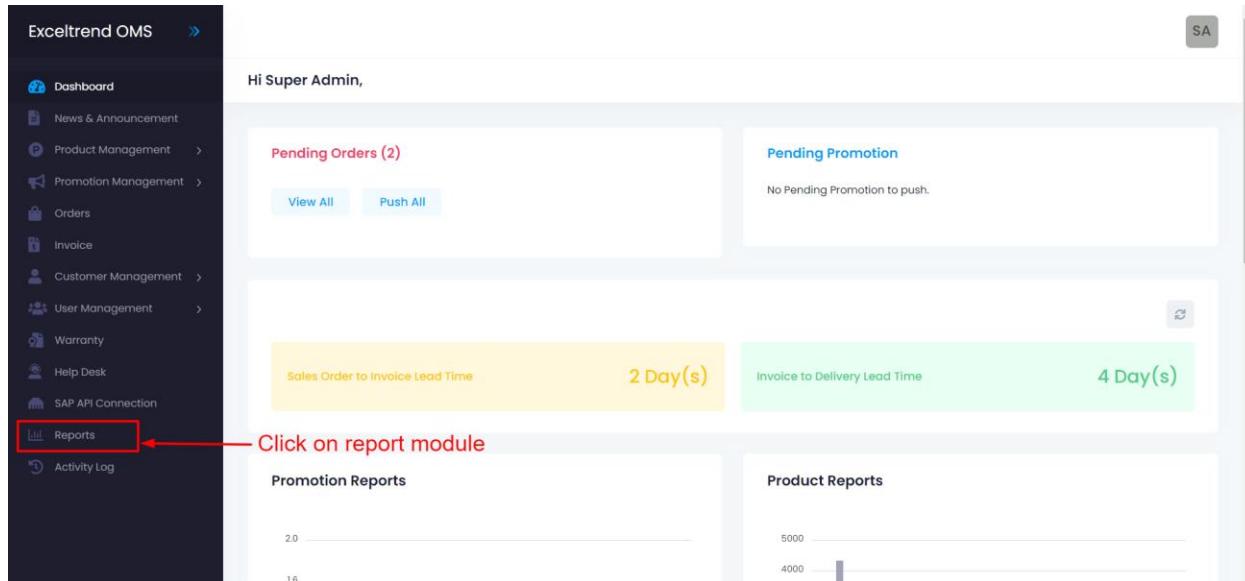
No	Business Unit	Status	No. of Promotion	Total Sales Quantity	Total Sales Revenue
1	APBW	Pending	0	0	0.00
2	APBW	Approved	0	0	0.00
3	NTMC	Pending	0	0	0.00
4	NTMC	Approved	1	2	0.00
5	PHILCREST	Pending	0	0	0.00
6	PHILCREST	Approved	0	0	0.00
7	PHILSYN	Pending	0	0	0.00
8	PHILSYN	Approved	0	0	0.00

12.2 Sales Report: -

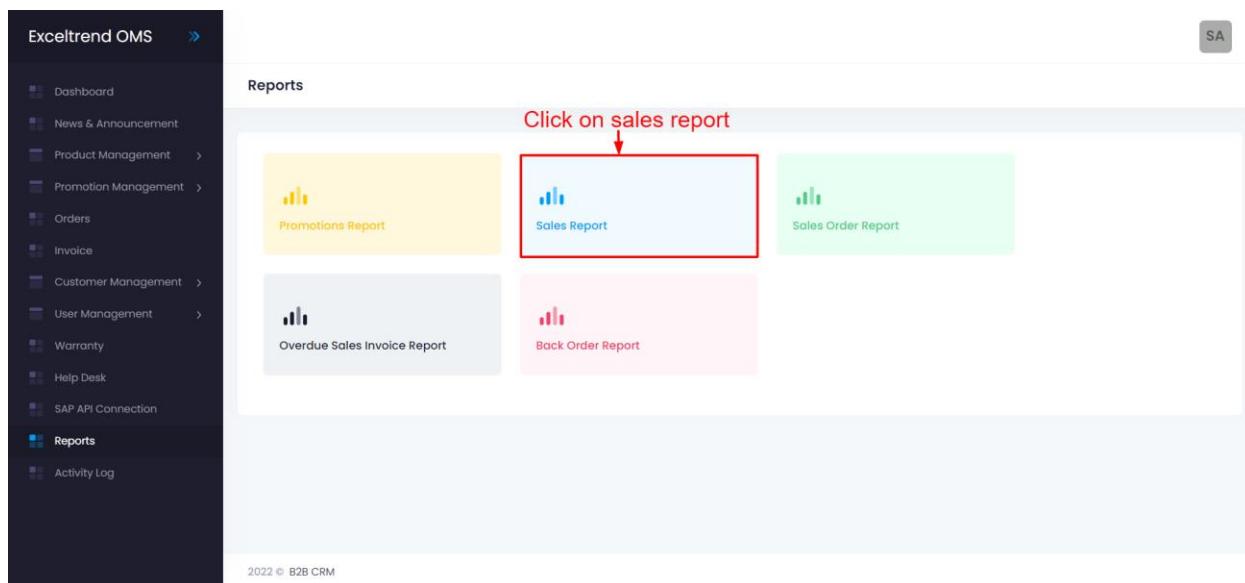
- Admin can see the sales report in particular report page.
- Admin can see the all sales details in this report.
- Admin can use the different-different filter and filter the data.
- Video Link: - <https://www.screencast.com/t/ACH1WTp5ax>

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.

No.	Product Code	Product Name	Brand	Business Unit	Total Quantity	Total Price	Total Price After VAT
1	BL20009	BIRLA 10.00-20 18PR BISON	OTHER BRANDS	APBW	1	P 13,548.00	P 15,173.76
2	PRI7001	***PRESA 205/45 ZR17 PS55 TL	PRESA	APBW	3	P 6,272.18	P 7,024.85
3	MMI4017	MXS MCT 80/80 - 14 M6029W 37P TL	MAXXIS-MCT	APBW	3	P 862.11	P 965.60
4	MMI4018	MXS MCT 90/80 - 14 M6029W 43P TL	MAXXIS-MCT	APBW	3	P 1,023.57	P 1,146.40
5	KT00063	TUBE-DONG-AH 8.25 - 16	FLAPS & TUBES	APBW	4	P 0.00	P 0.00
6	PRI6003	PRESA 7.50-16 14PR P276	PRESA	APBW	6	P 6,262.50	P 7,014.00
7	CS22012	CST I2R22.5 16PR CR969(+) TL	CST	APBW	10	P 15,803.67	P 17,700.13
8	CT00048	MCT TUBE 2.75/3.00-21 TR4	FLAPS & TUBES	APBW	50	P 187.00	P 209.44
9	MMI4020	MXS MCT 70/90 - 14 VIC S98 34S TL	MAXXIS-MCT	APBW	20	P 948.57	P 1,062.40
10	MMI4021	MXS MCT 80/90 - 14 VIC S98 40S TL	MAXXIS-MCT	APBW	20	P 1,031.43	P 1,155.20
11	CMI4014	CST MCT 90/80 - 14 C6577 TL	CST-MCT	APBW	30	P 1,882.86	P 2,088.80
12	CMI7057	CST MCT 110/70 R17 CM615 TL	CST-MCT	APBW	12	P 620.76	P 695.25
13	CMI7036	CST MCT 60/80 - 17 C6161 TT	MAXXIS-MCT	APBW	38	P 558.43	P 623.20
14	MMI7041A	MXS MCT 90/80 - 17 M6233W TL	MAXXIS-MCT	APBW	20	P 1,545.00	P 1,730.40
15	MMI7040	CST MCT 90/80 - 17 C6161 TT	MAXXIS-MCT	APBW	20	P 887.14	P 993.60
16	CMI7030	CST MCT 3.00-17 6PR C6507	MAXXIS-MCT	APBW	370	P 1,237.72	P 1,388.20
17	CSI5022	CST 35XI2.5-15 6PR CL18 TL	CST	APBW	4	P 8,203.75	P 9,188.20
18	CMI7063	CST MCT 60/80 - 17 A6603 TL	CST-MCT	APBW	400	P 137.95	P 154.50
100	▼	Showing 1 to 100 of 257 records					

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.

The screenshot shows the Exceltrend OMS dashboard. On the left, a dark sidebar menu lists various modules: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Reports. The 'Reports' item is highlighted with a red box and has a red arrow pointing to it from the text 'Click on report module'. The main content area displays a message 'Hi Super Admin,' followed by sections for 'Pending Orders (2)' and 'Pending Promotion'. Below these are two performance metrics: 'Sales Order to Invoice Lead Time' (2 Day(s)) and 'Invoice to Delivery Lead Time' (4 Day(s)). Under the 'Reports' section, there are four report cards: 'Promotion Reports' (with values 2.0 and 1.6), 'Product Reports' (with values 5000 and 4000), 'Overdue Sales Invoice Report', and 'Back Order Report'. A small 'SA' badge is in the top right corner.

- Steps 2: - Click on sales order report.

This screenshot shows the 'Reports' module within the Exceltrend OMS. The sidebar menu is identical to the previous dashboard view. The main content area is titled 'Reports' and contains five report cards: 'Promotions Report' (yellow), 'Sales Report' (light blue), 'Overdue Sales Invoice Report' (grey), 'Back Order Report' (pink), and 'Sales Order Report' (green). A red box surrounds the 'Sales Order Report' card, and a red arrow points to it from the text '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

Sales Order Report

SA

Back

Select business unit

Select customer

Select date range

Search

Clear

Number of Sales Orders

Pending

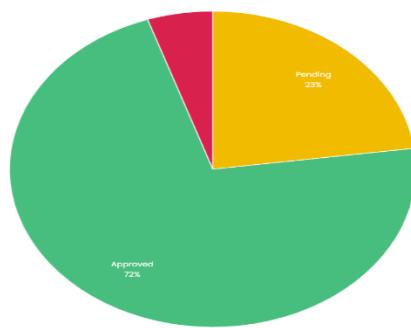
141

Approved

443

Disapproved

32



Total Sales Quantity

Pending

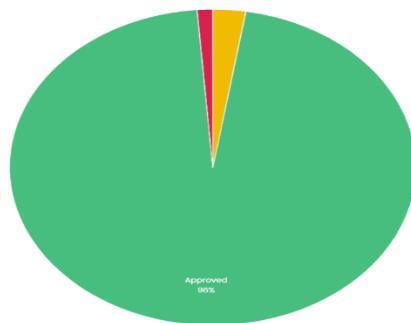
356

Approved

13075

Disapproved

168



Total Sales Revenue

Pending

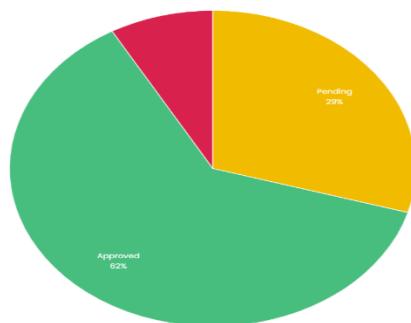
₱ 793,643

Approved

₱ 1,675,186.2

Disapproved

₱ 222,003.45

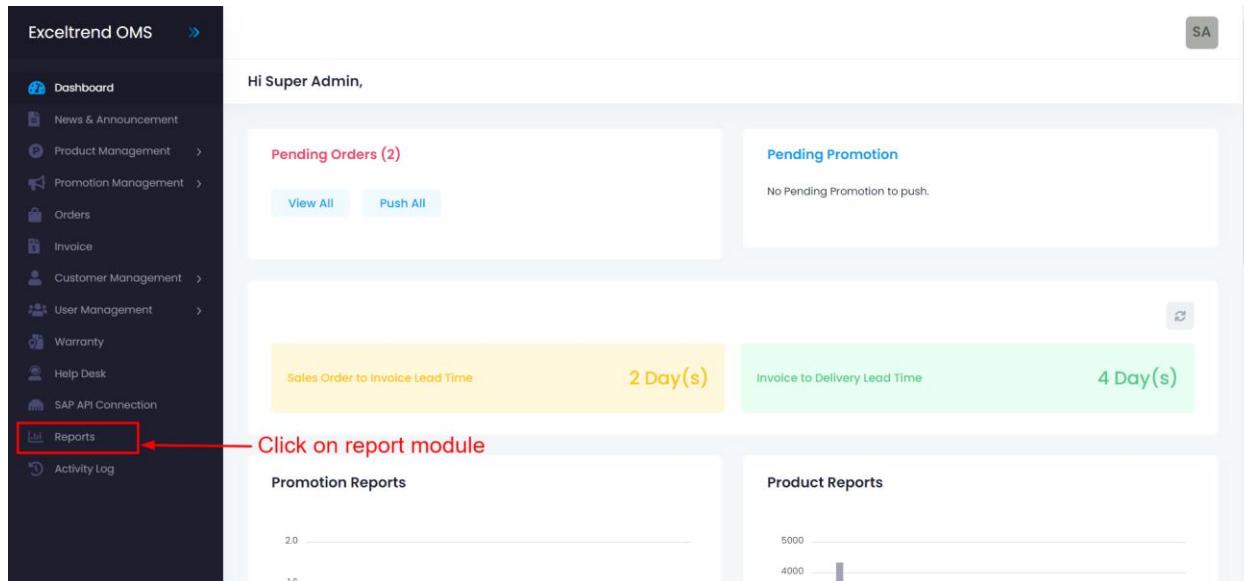


12.4 Overdue Sales invoice Report: -

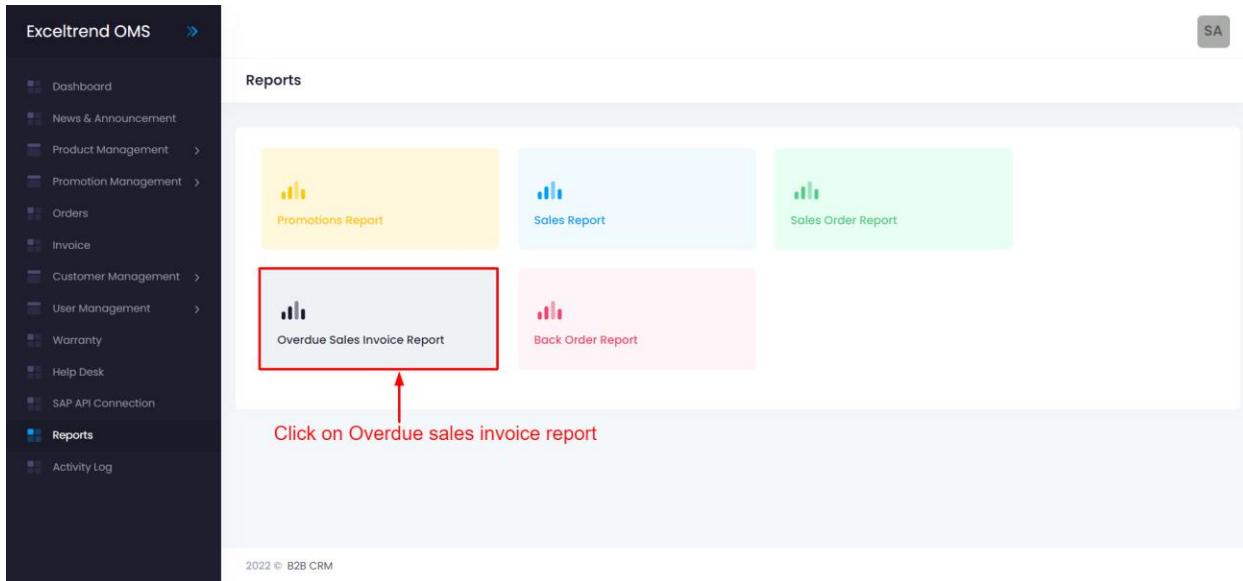
- Admin can see the overdue sales invoice report in particular report page.
- Admin can see the all overdue sales invoice details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - <https://www.screencast.com/t/WV9UhKdlc7OI>

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.

Overdue Sales Invoice Report

Number of Overdue Invoices: 1789

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

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

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

- Steps 1: - Click on Report module.

The screenshot shows the Exceltrend OMS dashboard. On the left, a dark sidebar menu lists various modules: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Reports. The 'Reports' item is highlighted with a red box and has a red arrow pointing to it from the text 'Click on report module'. The main content area displays a message 'Hi Super Admin,' followed by sections for 'Pending Orders (2)' and 'Pending Promotion'. Below these are two performance metrics: 'Sales Order to Invoice Lead Time' (2 Day(s)) and 'Invoice to Delivery Lead Time' (4 Day(s)). At the bottom, there are two sections: 'Promotion Reports' and 'Product Reports', each showing a chart with numerical values.

- Steps 2: - Click on back-order report.

The screenshot shows the 'Reports' page within the Exceltrend OMS. The left sidebar remains the same as the previous screen. The main content area is titled 'Reports' and displays several report cards: 'Promotions Report' (yellow), 'Sales Report' (light blue), 'Product Report' (light green), 'Sales Order Report' (light green), 'Overdue Sales Invoice Report' (grey), 'Back Order Report' (pink, highlighted with a red box and a red arrow pointing to it from the text 'Click on back order report'), and 'Product Sales Report' (yellow). The footer of the page includes the text '2022 © B2B CRM'.

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

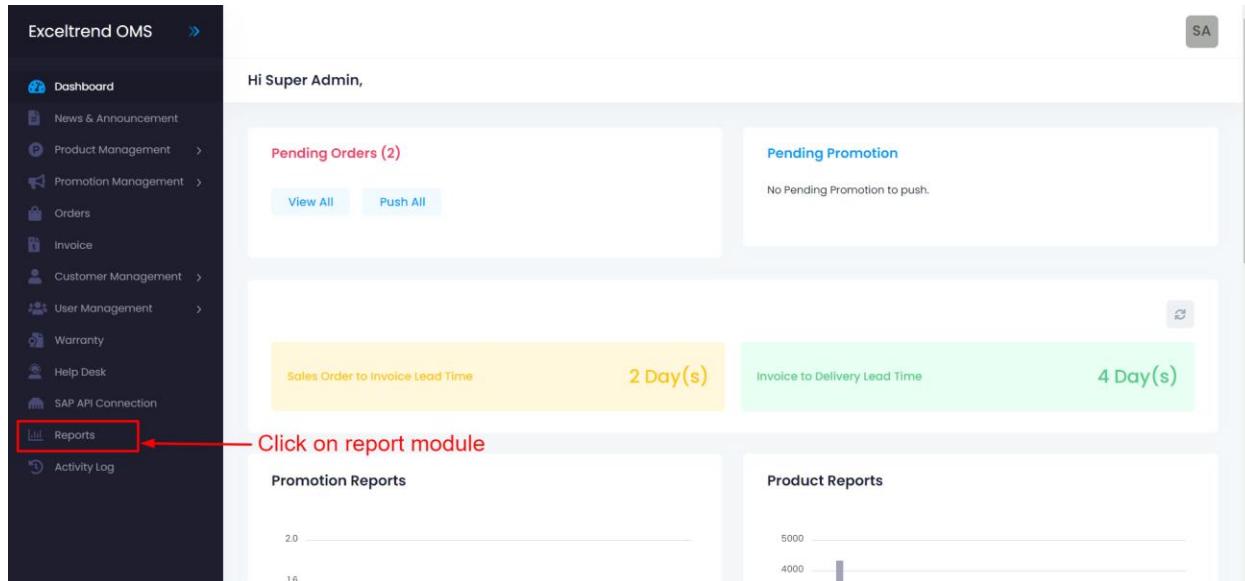
No.	Product Code	Product Name	Brand	Business Unit	Total Quantity	Total Price	Total Price After VAT
1	MXI2006	MXS 145 R12C MCV5 8PR TL 86/84N ESR MAXXIS	MAXXIS	APBW	3	P 0.00	P 0.00
2	CMI7080	CST MCT 70/80-17 TL CM619 35P	CST-MCT	APBW	2	P 1,135.70	P 1,135.70
3	PR22008	PRESA 10.00 R20 16PR PL909 SET	PRESA	APBW	2	P 29,552.50	P 29,552.50
4	MXI7073	MXS 265/70 R17 116T AT81I	MAXXIS	APBW	14	P 7,981.04	P 8,938.30
5	MXI7052	MXS LT285/70 R17 10PR MT772 TL	MAXXIS	APBW	2	P 0.00	P 0.00
6	MXI8025	MXS LT275/65 R18 10PR MT772 TL	MAXXIS	APBW	1	P 0.00	P 0.00
7	CSI3007	CST 175/70 R13 MR61 TL	CST	APBW	10	P 1,543.81	P 1,729.00
8	CSI4006	CST 185/65 R14 CS889 TL	CST	APBW	10	P 1,696.25	P 1,899.80
9	CSI6027	CST 195/55 R16 MD-A1 TL 91V	CST	APBW	10	P 2,303.75	P 2,580.20
10	CSI6036	CST 245/70 R16 AT2 TL	CST	APBW	10	P 4,211.90	P 4,717.30

12.6 Product Sales Report: -

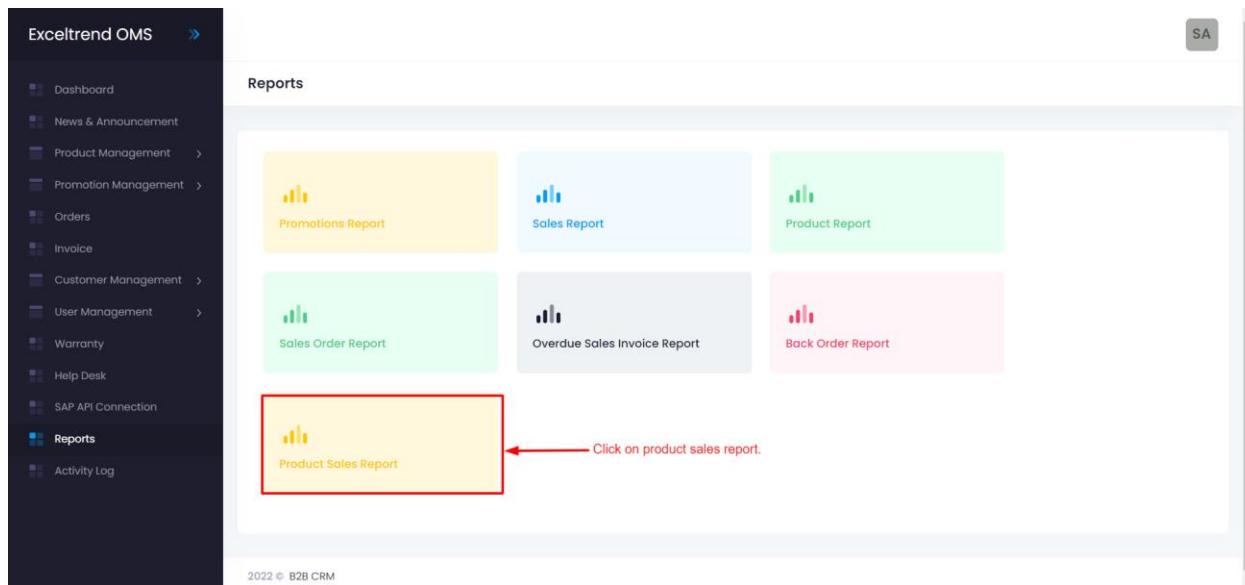
- Admin can see the product sales report in particular report page.
- Admin can see the all product sales details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - <https://www.screencast.com/t/dWRArLri>

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.

No	Product Code	Product Name	Brand	Business Unit	Total Quantity	Total Price	Total Price After VAT
1	PRI7001	***PRESA 205/45 R17 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>

12.7.1 Steps: - How to see the Product Report.

- Steps 1: - Click on Report Module.

The screenshot shows the Exceltrend OMS dashboard. On the left sidebar, under the 'Reports' section, there is a red box around the 'Reports' link. A red arrow points from the text 'Click on report module' to this red box. The main content area displays various operational metrics and reports. At the top, it says 'Hi Super Admin,'. Below that, there are sections for 'Pending Orders (2)' with 'View All' and 'Push All' buttons, and 'Pending Promotion' with a note 'No Pending Promotion to push.' There are also two lead time indicators: 'Sales Order to Invoice Lead Time' (2 Day(s)) and 'Invoice to Delivery Lead Time' (4 Day(s)). In the center, there are two sections: 'Promotion Reports' (with a chart showing values 2.0 and 1.6) and 'Product Reports' (with a chart showing values 5000 and 4000). A small 'SA' badge is in the top right corner.

- Steps 2: - Click on Product report.

This screenshot shows the 'Reports' page within the Exceltrend OMS. The left sidebar remains the same as the previous screenshot. The main area is titled 'Reports' and contains several report options arranged in a grid. One specific report, 'Product Report', is highlighted with a red box and a red arrow pointing to it from the text 'click on product report'. Other reports visible include 'Overdue Sales Invoice Report', 'Back Order Report', 'Product Sales Report', 'Credit Memo Report', 'Debit Memo Report', and 'Return Order Report'. A small 'SA' badge is in the top right corner.

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

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

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.

Hi Super Admin,

Pending Orders (2)

[View All](#) [Push All](#)

Pending Promotion

No Pending Promotion to push.

Sales Order to Invoice Lead Time

2 Day(s)

Invoice to Delivery Lead Time

4 Day(s)

Promotion Reports

2.0
1.6

Product Reports

5000
4000

- Steps 2: - Click on Credit memo report.

The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management, etc. The main area is titled 'Reports' and contains several colored boxes representing different reports: 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 (green, highlighted with a red box and a red arrow pointing to it), Debit Memo Report (grey), and Return Order Report (pink).

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

The screenshot shows the 'Credit Memo Report' page. The top navigation bar includes 'Back' and 'SA'. The main area has a search bar with 'Select business unit', 'Select customer', 'Search', 'Clear', and 'Export Excel' buttons. Below is a table titled 'List Of Records' with columns: No, Customer Code, Customer Name, Business Unit, Open Amount, and Used Amount. The table lists 10 records:

No	Customer Code	Customer Name	Business Unit	Open Amount	Used Amount
1	C12781	SOUTH TIRE CENTRAL	NTMC	₱ 10,000.00	₱ 0.00
2	C12427	CMG MINERVA TYRE GALLERY-VERSAILLES, INC.	NTMC	₱ 0.00	₱ 3,605.00
3	C12483	SVB TIRE AND CAR ACCESSORIES	NTMC	₱ 0.00	₱ 16,809.82
4	C13344	D. BARROSO VEHICLE TIRES AND BATTERIES TRADING	NTMC	₱ 0.00	₱ 20,900.00
5	C13722	ROADKING DISTRIBUTION INC.	NTMC	₱ 23,326.44	₱ 4,923.11
6	C12424	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	C13728	3 J MARKETING	NTMC	₱ 0.00	₱ 84,297.31
10	C12425A	ICONIC DEALERSHIP, INC.	NTMC	₱ 0.00	₱ 147.86

At the bottom, it says 'Showing 1 to 10 of 664 records' and has a pagination bar with pages 1 through 67.

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.

The screenshot shows the Exceltrend OMS dashboard. On the left sidebar, under the 'Reports' section, there is a red box around the 'Reports' link, with a red arrow pointing to it from the text 'Click on report module'.

The main content area displays various reports and metrics:

- Pending Orders (2)**: Buttons for 'View All' and 'Push All'.
- Pending Promotion**: Message: "No Pending Promotion to push."
- Sales Order to Invoice Lead Time**: 2 Day(s)
- Invoice to Delivery Lead Time**: 4 Day(s)
- Promotion Reports**: A chart showing values 2.0 and 1.6.
- Product Reports**: A chart showing values 5000 and 4000.

- Steps 2: - Click on Debit Memo report.

The screenshot shows the 'Reports' page within the Exceltrend OMS. The sidebar on the left is identical to the previous dashboard screenshot. In the main area, there is a grid of report cards. One card, 'Debit Memo Report', is highlighted with a red box and a red arrow pointing to it from the text 'click on debit memo report'.

The report cards include:

- Promotions Report
- Sales Report
- Sales Order Report
- Overdue Sales Invoice Report
- Back Order Report
- Product Sales Report
- Product Report
- Credit Memo Report
- Debit Memo Report
- Return Order Report

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

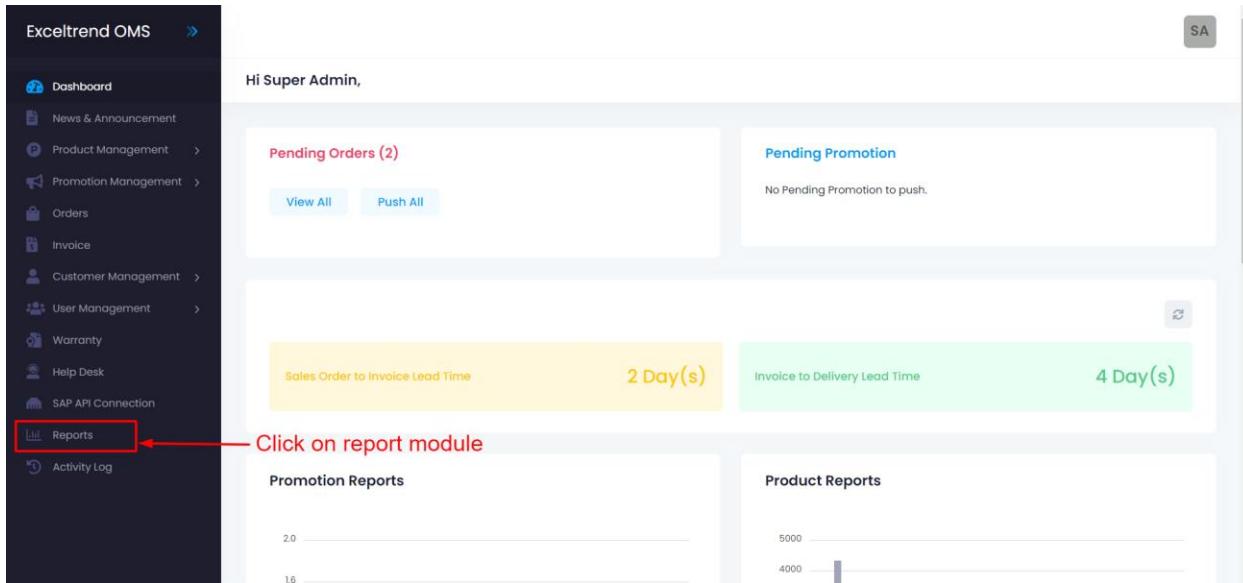
No	Customer Code	Customer Name	Business Unit	Open Amount	Used Amount
1	C13842	BRYANT MILLING & MARKETING	NTMC	P -2,250.00	P 0.00
2	C12605	TOMAS CAR ACCESSORIES	APBW	P -349.28	P 0.00

12.10 Return Order Report: -

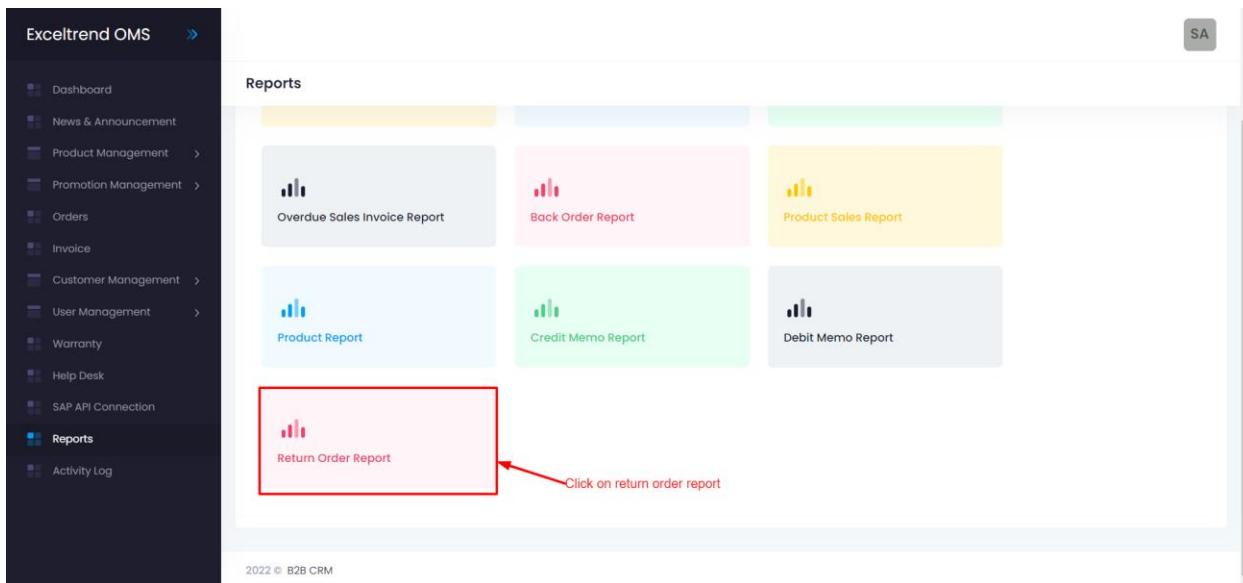
- Admin can see the return order report in particular report page.
- Admin can see the all-return order details in this report.
- Admin can use the different-different filter and filter the data.
- Admin can export the report data.
- Video Link: - <https://www.screencast.com/t/QyFpAFP0>

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.

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

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.

The screenshot shows the Exceltrend OMS dashboard. On the left sidebar, under the 'Reports' section, there is a red box around the 'Reports' link, with a red arrow pointing to it from the text 'Click on report module'. The main content area displays several sections: 'Pending Orders (2)' with 'View All' and 'Push All' buttons; 'Pending Promotion' with a message 'No Pending Promotion to push.'; and two lead time indicators: 'Sales Order to Invoice Lead Time' (2 Day(s)) and 'Invoice to Delivery Lead Time' (4 Day(s)). Below these are 'Promotion Reports' and 'Product Reports' sections.

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

The screenshot shows the 'Reports' page. The left sidebar is identical to the previous dashboard. The main content area displays a grid of report icons. One specific icon, 'Sales Order to invoice Lead Time', is highlighted with a red box and a red arrow pointing to it from the text '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.

The screenshot shows the 'Sales Order To Invoice Lead Time Report' page within the Exceltrend OMS system. The left sidebar contains navigation links for 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 content area is titled 'Sales Order To Invoice Lead Time Report' and includes search and export buttons. The table below lists 10 records, each with columns for No, Customer Name, Business Unit, Order Date, Order No, Sales Specialist, Invoice Date, Invoice No, and Lead Time.

No	Customer Name	Business Unit	Order Date	Order No	Sales Specialist	Invoice Date	Invoice No	Lead Time
1	B.A ORIENTAL TIRE SUPPLY - DUMAGUETE	APBW	Apr 18, 2022	50965	DARWIN GOMEZ	Apr 18, 2022	10004378	0 Day(s)
2	4R'S ELECTRICAL PARTS & SUPPLY	SOLID TREND	Apr 18, 2022	50967	-	Apr 18, 2022	200020316	0 Day(s)
3	4R'S ELECTRICAL PARTS & SUPPLY	SOLID TREND	Apr 18, 2022	50968	-	Apr 18, 2022	200020315	0 Day(s)
4	3RM CYCLE MART	SOLID TREND	Apr 18, 2022	50968	-	Apr 18, 2022	50008973	0 Day(s)
5	BL SURPLUS	SOLID TREND	Mar 18, 2022	50963	-	Mar 18, 2022	200023246	0 Day(s)
6	BL SURPLUS	SOLID TREND	Mar 18, 2022	50960	-	Mar 18, 2022	200023245	0 Day(s)
7	BL SURPLUS	SOLID TREND	Mar 18, 2022	50959	-	Mar 18, 2022	200023244	0 Day(s)
8	BL SURPLUS	SOLID TREND	Mar 18, 2022	50958	-	Mar 18, 2022	200023243	0 Day(s)
9	BL SURPLUS	SOLID TREND	Mar 18, 2022	50957	-	Mar 18, 2022	200023242	0 Day(s)
10	SOHBI KOHGEI PHILS. INC.	NTMC	Mar 17, 2022	14359	JOHNSTON TORREDA	Mar 17, 2022	80012538	0 Day(s)

Showing 1 to 10 of 500 records

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.

The screenshot shows the Exceltrend OMS dashboard. On the left sidebar, under the 'Reports' section, there is a red box around the 'Reports' link, with a red arrow pointing to it from the text 'Click on report module'. The main content area displays several sections: 'Pending Orders (2)' with 'View All' and 'Push All' buttons; 'Pending Promotion' with a message 'No Pending Promotion to push.'; and two performance metrics: 'Sales Order to Invoice Lead Time' (2 Day(s)) and 'Invoice to Delivery Lead Time' (4 Day(s)).

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

The screenshot shows the 'Reports' page. The left sidebar is identical to the dashboard. The main area is titled 'Reports' and contains a grid of report icons. One icon, 'Invoice to Delivery Lead Time', is highlighted with a red box and a red arrow pointing to it from the text 'Click on Invoice to delivery lead time'.

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

Invoice To Delivery Lead Time Report

No	Customer Name	Business Unit	Invoice Date	Invoice No	Sales Specialist	Delivery Date	Delivery Status	Reference/Order No	Lead Time
1	SHEPERED SURPLUS AND AUTO PARTS	APBW	Mar 07, 2022	70003692	CLARITO CANICO	Mar 08, 2022	FD	-	1 Day(s)
2	VISAYAS NAJ TRADING, INC.	APBW	Feb 28, 2022	I00031923	VON SAYSON	Feb 28, 2022	IN	-	0 Day(s)
3	VISAYAS NAJ TRADING, INC.	APBW	Feb 28, 2022	I00031922	VON SAYSON	Feb 28, 2022	IN	-	0 Day(s)
4	VISAYAS NAJ TRADING, INC.	APBW	Feb 28, 2022	I00031920	VON SAYSON	Feb 28, 2022	IN	-	0 Day(s)
5	VISAYAS NAJ TRADING, INC.	APBW	Feb 28, 2022	I00031919	VON SAYSON	Feb 26, 2022	IN	-	-2 Day(s)
6	RPM CYCLE CENTER	APBW	Feb 28, 2022	I00031928	VON SAYSON	Mar 01, 2022	IN	-	1 Day(s)
7	RPM CYCLE CENTER	APBW	Feb 28, 2022	I00031927	VON SAYSON	Feb 28, 2022	IN	-	0 Day(s)
8	RPM CYCLE CENTER	APBW	Feb 28, 2022	I00031926	VON SAYSON	Mar 01, 2022	IN	-	1 Day(s)
9	RM SOUTHERN TIRE SUPPLY	APBW	Feb 28, 2022	I00031924	RODEL CARDONA	Feb 28, 2022	IN	-	0 Day(s)
10	RCV LINES	APBW	Feb 28, 2022	I0004375	RODEL CARDONA	Feb 28, 2022	IN	-	0 Day(s)

Showing 1 to 10 of 500 records

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>

