

# OMS ERM System

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

## 1. News & Announcement Module: -

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

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

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

The screenshot shows the 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 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 and buttons for 'Search' and 'Clear'. A table lists two records: one for APBW (Business Unit: APBW, Title: Test, Type: Announcement, Module: Sales Specialist, Priority: Important, User Name: Super Admin, Status: Active) and another for NTMC (Business Unit: NTMC, Title: Testing data, Type: News, Module: Brand, Priority: Normal, User Name: Super Admin, Status: Active). At the bottom of the table, it says 'Showing 1 to 2 of 2 records'. In the top right corner of the main content area, there is a blue 'Create' button with a red box and a red arrow pointing to it, indicating where the user should click to start creating a new news or announcement.

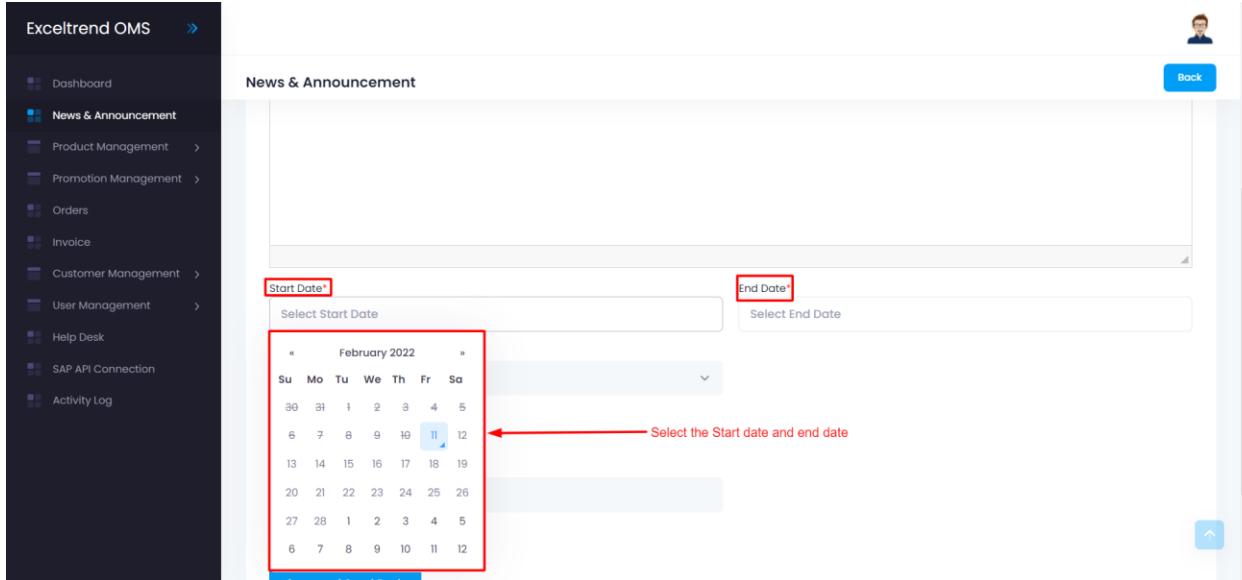
- Step 2: - Select the business unit, select priority, enter the title, and select the type.

The screenshot shows the 'News & Announcement' module in the Exceltrend OMS system. On the left is a dark sidebar with various management options. The main area is titled 'News & Announcement' and contains a form titled 'Add Details'. At the top, a red box highlights the fields for selecting the business unit ('Select Bussines Unit'), priority ('Select Priority'), title ('Title'), and type ('Select Type'). Below these is a rich text editor for the message. A blue 'Back' button is in the top right.

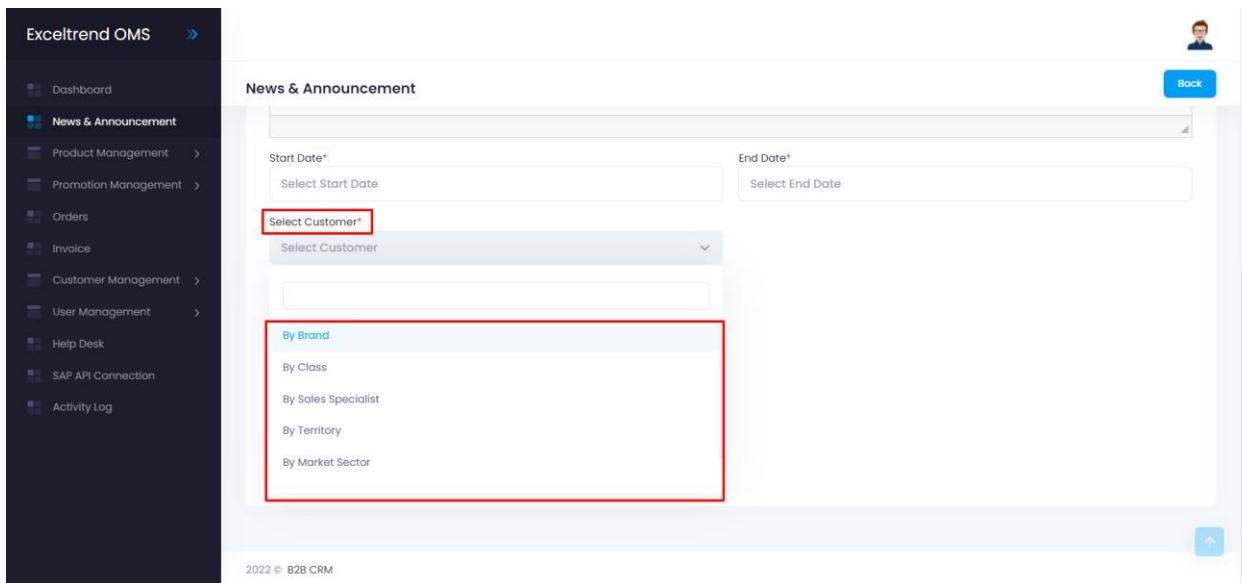
▪ Step 3: - Enter the Message.

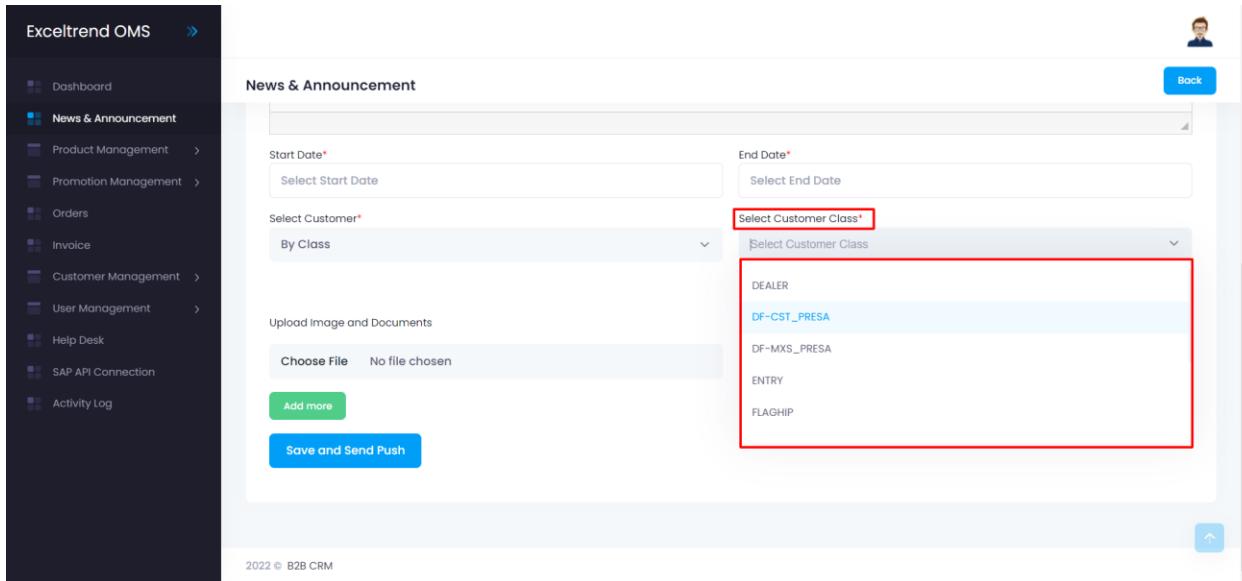
This screenshot shows the same 'News & Announcement' module. A red box highlights the large text area labeled 'Message\*' with a red arrow pointing to it from the text 'Enter the Message'. The rest of the form fields are visible below, including title, type, start date, end date, and customer selection.

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



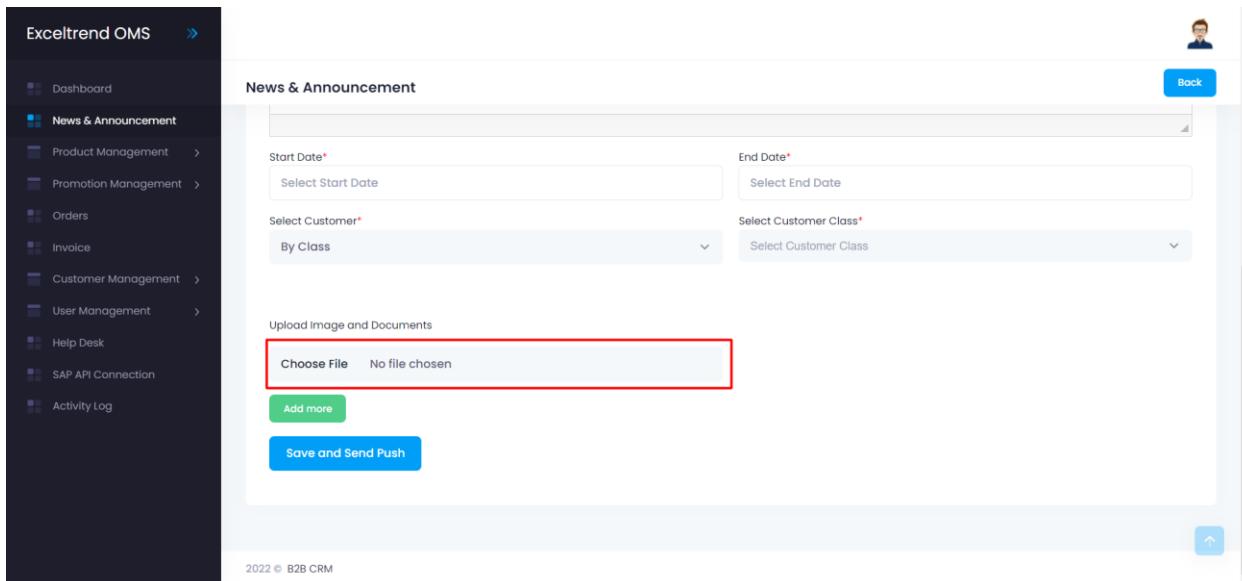
- Step 5: - Select the customer and that according show second dropdown and select the data.



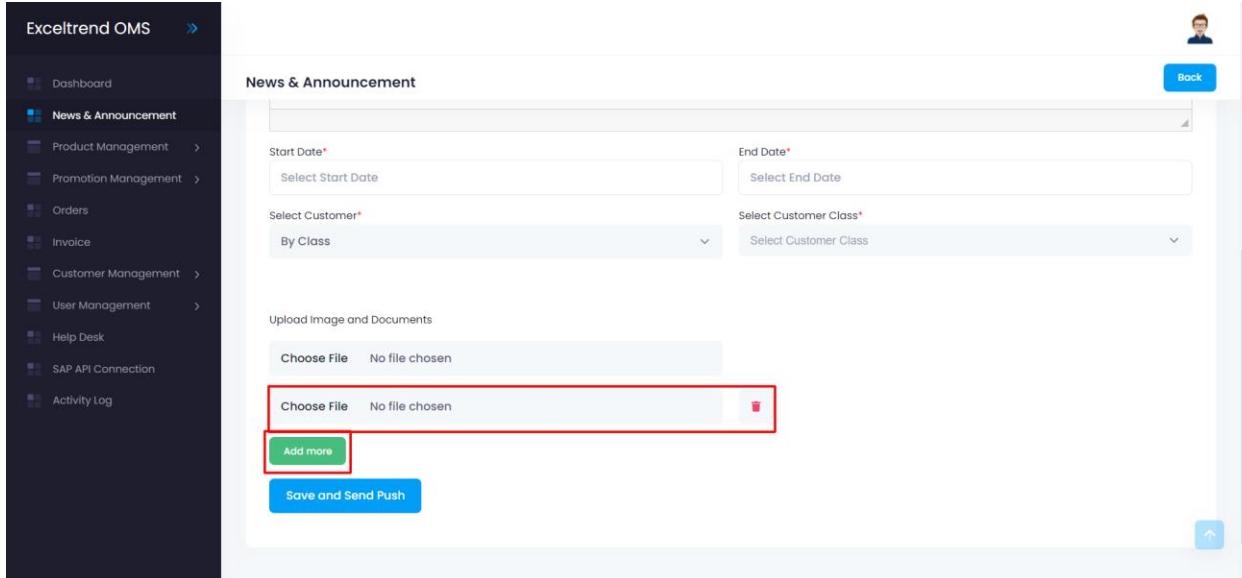


The screenshot shows the 'News & Announcement' section of the OMS ERM System. On the left is a dark sidebar with various menu items. The main area has fields for 'Start Date\*' and 'End Date\*', both with placeholder text 'Select Start Date' and 'Select End Date'. Below these are dropdown menus for 'Select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

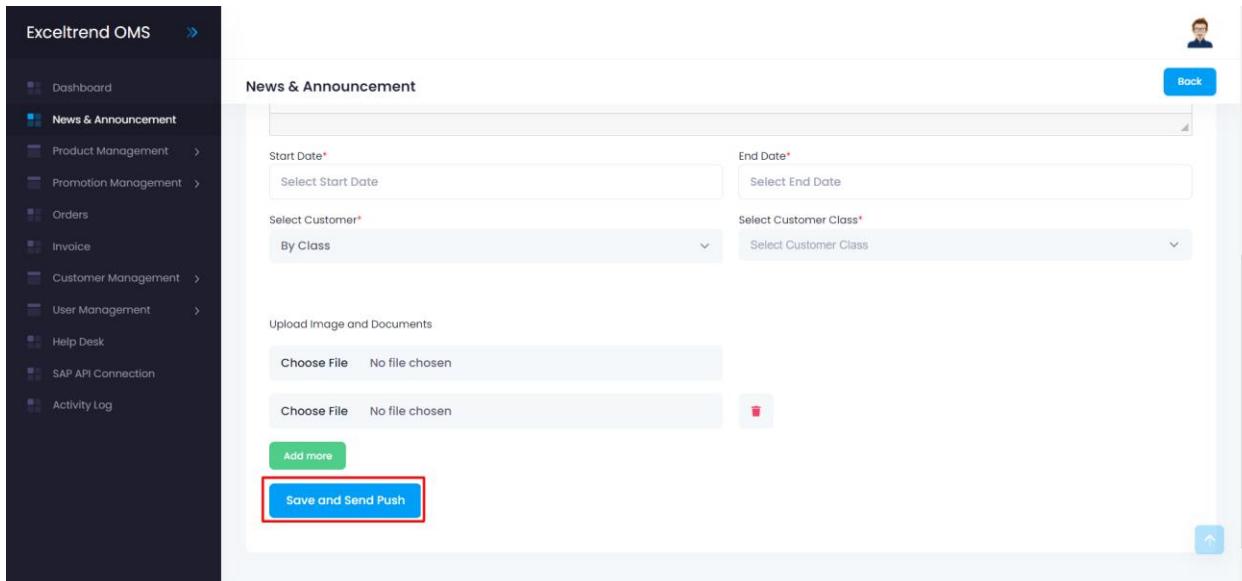


This screenshot is similar to the one above, showing the 'News & Announcement' page. The 'Choose File' input field is highlighted with a red box and displays 'No file chosen'. The rest of the interface, including the sidebar, date fields, customer selection, and save button, appears identical to the first screenshot.



The screenshot shows the 'News & Announcement' creation page. On the left is a dark sidebar with various menu items. The main area has fields for 'Start Date\*' and 'End Date\*', both with dropdown menus. Below that is a 'Select Customer\*' dropdown with 'By Class' selected. There are two 'Choose File' input fields, the second one being highlighted with a red box. Below these is a green 'Add more' button. At the bottom is a blue 'Save and Send Push' button.

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



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

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

The screenshot shows the 'News & Announcement' section of the Exceltrend OMS system. The left sidebar includes links for Dashboard, News & Announcement (selected), Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Help Desk, SAP API Connection, and Activity Log. The main area has a search bar and filters for Customer, Priority, and Type. A table lists 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	

Showing 1 to 2 of 2 records.

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

The screenshot is identical to the one above, showing the 'News & Announcement' section. A red arrow points to the eye icon in the 'Action' column of the first record (APBW). The text 'Click on eye symbol' is written next to the arrow.

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

The screenshot shows the Exceltrend OMS system interface. On the left is a dark sidebar menu with various modules: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Help Desk, SAP API Connection, and Activity Log. The main content area is titled "Notification". It displays "Notification Details" with fields: Title (Test), Priority (Important), and Notification Type (Announcement). Below this, a section titled "What is Lorem Ipsum?" provides a brief history of the placeholder text. The "Message" section contains fields for Module (Sales Specialist), Start Date (Feb 10, 2022), End Date (Mar 31, 2022), and Is Active (Active). The "Users" section lists one user, ALBERT CARINGAL, with the role Sales Specialist and status No. Seen. At the bottom, it says "Showing 1 to 1 of 1 records". The footer of the page reads "2022 © B2B CRM".

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

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

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

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

The screenshot shows a modal dialog box with the question "Are you sure want to change status?" and two buttons: "Yes, change it" (blue) and "Cancel" (red). A red arrow points to the "Yes, change it" button. Below the modal, a text box says "Click on \"Yes, change it\" button the status is updated".

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

The screenshot shows the 'News & Announcement' section of the Exceltrend OMS. The left sidebar includes links for Dashboard, News & Announcement (selected), Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Help Desk, SAP API Connection, and Activity Log. The main area displays a table with two rows:

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

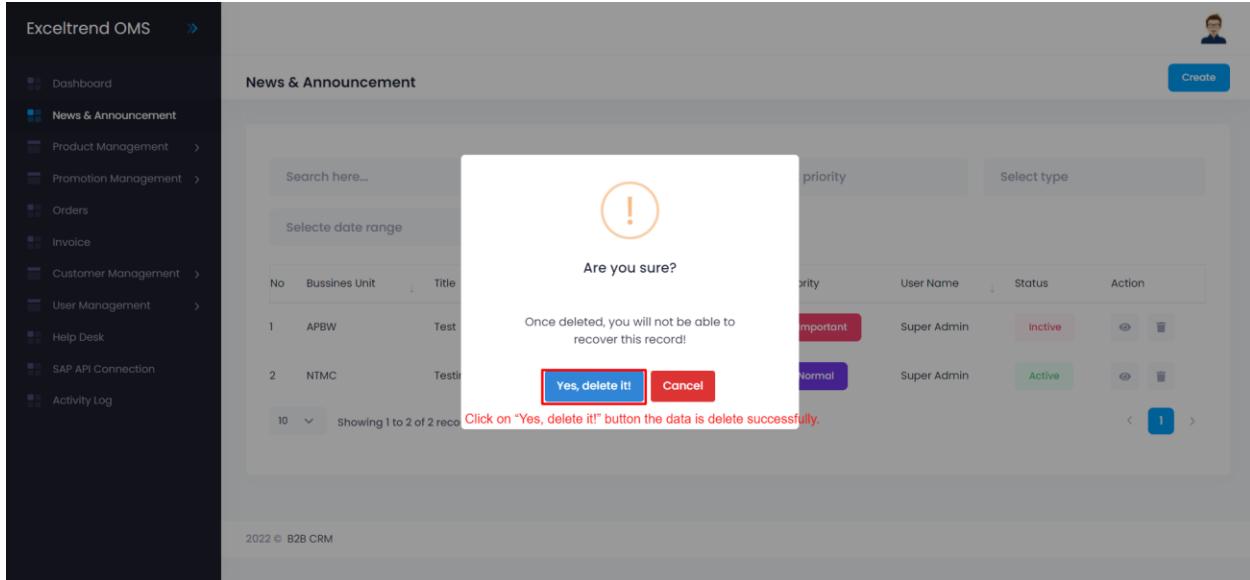
At the bottom, it says "Showing 1 to 2 of 2 records".

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

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

The screenshot is identical to the one above, showing the 'News & Announcement' section. A red box highlights the trash icon in the 'Action' column of the first record. A red arrow points from the text "Click on trash symbol" to this highlighted icon.

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



## 2. Product Management Module: -

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

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

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

The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management (selected), Products, Brains, 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. At the top right of the main area, there is a blue button labeled 'Sync Products' with a red border and a red arrow pointing to it from the text above.

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

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

The screenshot shows the same Exceltrend OMS interface as the previous one, but with a modal dialog box overlaid. The dialog has a yellow exclamation mark icon and the text "Are you sure you want to Sync Products?". Below the dialog, the main product list table is visible. A red box highlights the blue "Yes, do it!" button, and a red arrow points to it from the text "Click on 'Yes, do it'" button" located just below the dialog.

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

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

The screenshot shows the 'Product' management page. On the left, there's a sidebar with 'Product Management' selected under 'Products'. The main area displays a table of products with columns: No., Business Unit, Name, Brand, Code, Product Line, Product Category, Date, and Status. A red arrow points to the 'No.' column of the first row, which has a blue plus (+) icon.

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

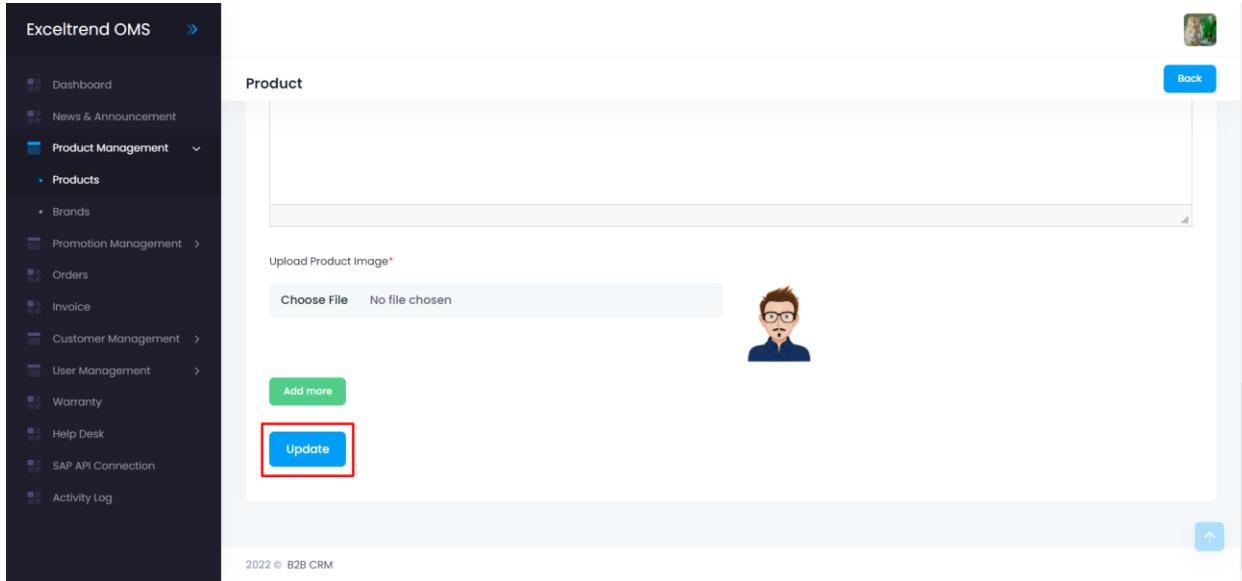
- Steps 2: - Click on Pencil icon

This screenshot shows the same product list as the previous one, but with a red arrow pointing to the 'Action' column of the first row. The 'Action' column contains a pencil icon with a red box around it, indicating where to click. The rest of the table and interface elements are identical to the first screenshot.

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

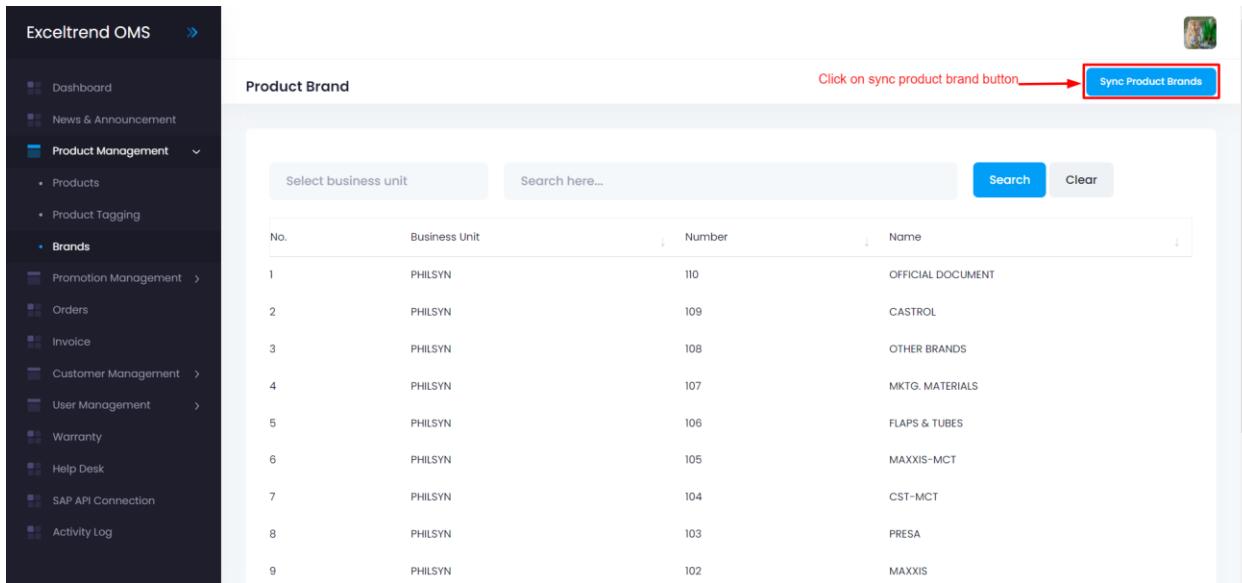
The screenshot shows the Exceltrend OMS system interface. The left sidebar contains a navigation menu with categories like Dashboard, News & Announcement, Product Management (selected), Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection,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

- Steps 4: -Click on Upload button.

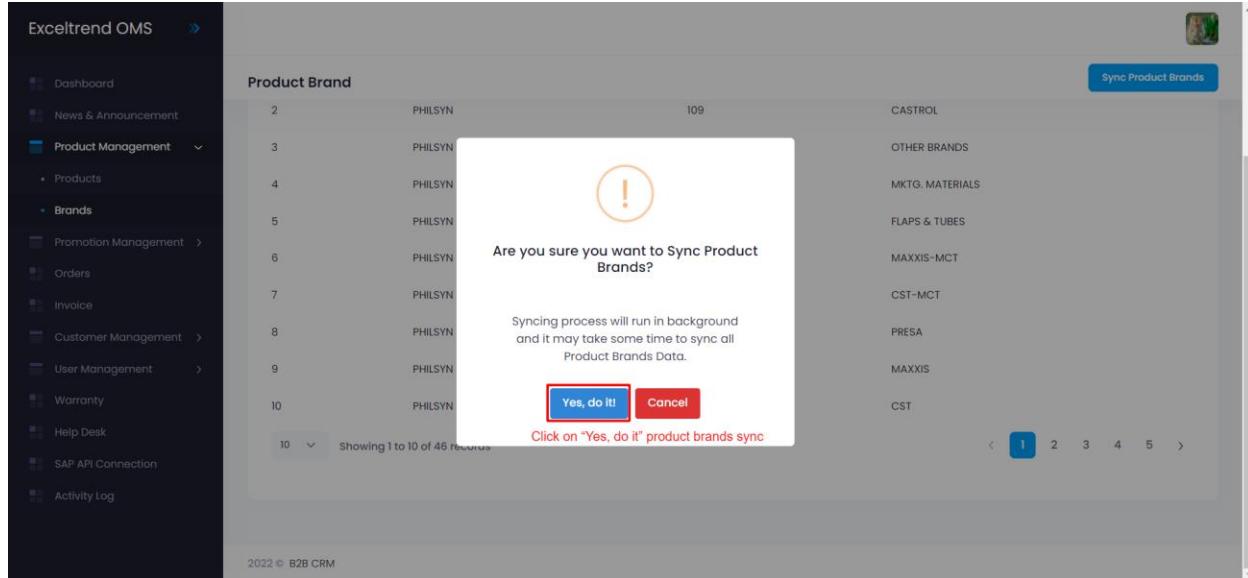


- Steps: - How to sync the product Brands.

- 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/6ezY1IQfli>

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

Click on create button.

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

- Steps 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.

Add Details

Title\*  
Enter Promotion Title

Description

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

- Steps 3: - Click on Save button.

Business Unit\*  
Select Business Unit

Promotion Type\*  
Select Promotion Type

Select Customer Group\*  
Select Customers

Promotion Start Date\*  
Select Promotion Start Date

Promotion end Date\*  
Select Promotion End Date

Promotion Image\*  
Choose File No file chosen

**Save** Click on Save button.

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

- Steps: - How to edit the promotion.

- Steps 1: - Click on pencil icon.

Select business unit Select promotion type Select status Select promotion customers

Select date range Search here...

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"/>	Click on pencil icon
2	NTMC	Chine New Year	Class	Feb 06, 2022	Feb 28, 2022	<input checked="" type="checkbox"/>	

Showing 1 to 2 of 2 records

- Steps 2: - Update the data displayed filed.

The screenshot shows the 'Promotion Management' section of the Exceltrend OMS system. On the left is a dark sidebar with various menu items 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 area is titled 'Promotion' and shows a form for updating details. The form includes fields for Title (Valentine Day), Description (Valentine Day), Business Unit (APBW), Promotion Type (Valentine Day), Select Customer Group (By Customer), Select Customer (multiple options listed as tags), Promotion Start Date (02/28/2022), Promotion end Date (03/28/2022), Promotion Image (choose file, no file chosen), and an 'Update' button. A 'Back' button is in the top right corner.

- Steps 3: - Click on update button.

This screenshot is identical to the one above, showing the 'Promotion Management' interface. However, it includes a red arrow pointing to the 'Update' button at the bottom of the 'Update Details' form. A callout text 'Click on update button.' is placed near the arrow.

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

The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with various menu items. Under 'Promotion Management', 'Promotions' is selected. The main area is titled 'Promotions' and contains a search bar and filter options. Below is a table with three rows of promotion data. The first row's 'Action' column contains an eye icon, which is highlighted with a red box and a callout 'Click on eye symbol.' An arrow points from the text to the eye icon. The table columns are: No., Business Unit, Title, Promotion Customers, Start Date, End Date, Status, and Action.

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

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

**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

**Claimed Customer's**

No.	Customer	Date Time	Action
No data available in table			

Showing no records

**Customer's Interest**

No.	Customer	Is Interested ?
No data available in table		

Showing no records

2022 © B2B CRM

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

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

The screenshot shows the 'Promotions' section of the Exceltrend OMS. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management, Promotion Management (selected), and more. The main area is titled 'Promotions' and contains a table with two rows. Each row represents a promotion with columns for No., Business Unit, Title, Promotion Customers, Start Date, End Date, Status (with a blue toggle switch), and Action (with edit, delete, and view icons). A search bar and date range selector are at the top. A message at the bottom 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.

This screenshot shows the same 'Promotions' page as above, but with a modal dialog box overlaid. The dialog has a yellow exclamation mark icon and the text 'Are you sure want to change status?'. It contains two buttons: 'Yes, change it!' (highlighted with a red box) and 'Cancel'. A red tooltip at the bottom of the dialog says 'Click on "Yes, change it" button the promotion status change'.

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

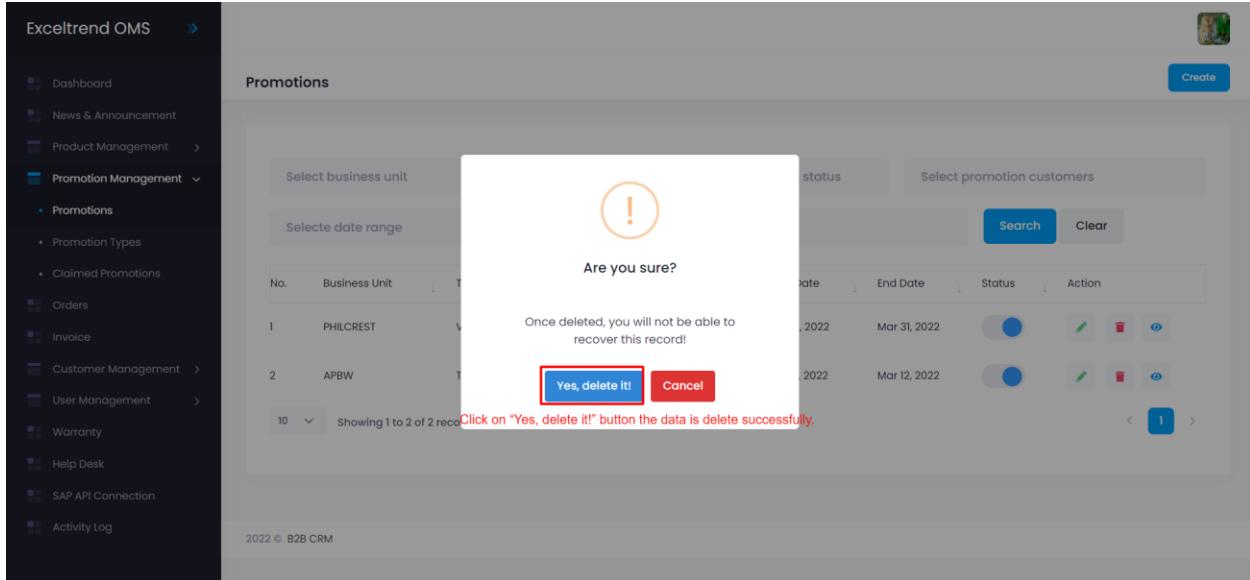
The screenshot shows the 'Promotions' page within the Exceltrend OMS system. The left sidebar includes links for Dashboard, News & Announcement, Product Management, Promotion Management (selected), Promotion Types, Claimed Promotions, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main content area is titled 'Promotions' and contains search filters for business unit, promotion type, status, and customers, along with date range and search buttons. A table lists two promotion records. The first record, titled 'Valentine Day' for APBW, has its status set to 'Active' (indicated by a grey switch). The second record, titled 'Chine New Year' for NTMC, has its status set to 'Active' (indicated by a blue switch). The table includes columns for No., Business Unit, Title, Promotion Customers, Start Date, End Date, Status, and Action. The 'Action' column contains icons for edit, delete, and view. A red box highlights the delete icon for the first record. At the bottom, it says 'Showing 1 to 2 of 2 records'.

- Steps: - How to delete the promotion.

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

This screenshot is identical to the one above, showing the 'Promotions' page in the Exceltrend OMS system. It features the same sidebar and table structure. A red arrow points to the trash icon in the 'Action' column of the second promotion record (APBW, Chine New Year). Above the arrow, the text 'Click on trash symbol' is written in red. The rest of the interface and data remain the same.

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



### 3.2. Promotion Type

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

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

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

The screenshot shows the 'Promotion Management' section of the Exceltrend OMS. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management, etc. The 'Promotion Management' section is expanded, showing 'Promotions' and 'Promotion Types'. Under 'Promotion Types', there are sub-options: 'Claimed Promotions', 'Orders', 'Invoice', 'Customer Management', 'User Management', 'Warranty', 'Help Desk', 'SAP API Connection', and 'Activity Log'. The main area is titled 'Promotion Type' and displays a table of four existing promotion types. Each row includes columns for No., Business Unit, Title, Criteria, Fixed Quantity, Status, and Action. Below the table, it says 'Showing 1 to 4 of 4 records'. A red arrow points to the blue 'Create' button in the top right corner of the search bar.

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

The screenshot shows the 'Add Details' form for creating a new promotion type. The left sidebar is identical to the previous screenshot. The main form has several input fields: 'Promotion Type Title\*' (with placeholder 'Enter promotion type title'), 'Criteria\*' (with placeholder 'Select a criteria'), 'Description' (with placeholder 'Enter description'), 'Number Of Delivery\*' (with placeholder 'Enter number of delivery') and 'Has Fixed Quantity ?\*' (with 'Yes' selected), 'Select Fixed Quantity Option\*' (with 'Fixed Quantity Per Product' selected), 'Business Unit\*' (with placeholder 'Select business unit'), 'Brand\*' (with placeholder 'Select a brand'), 'Product\*' (with placeholder 'Select a product'), and 'Fixed Quantity\*' (with placeholder 'Enter fixed quantity'). There are also 'Add more' and 'Save' buttons at the bottom.

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

Exceltrend OMS

Promotion Type

Fixed Quantity Per Product

Business Unit\*

Select business unit

Brand\*

Select a brand

Product\*

Select a product

Fixed Quantity\*

Enter fixed quantity

Add more

Click on add more button you can add multiple brand and product.

Save

- Steps 4: - Click on save button

Exceltrend OMS

Promotion Type

Fixed Quantity Per Product

Business Unit\*

Select business unit

Brand\*

Select a brand

Product\*

Select a product

Fixed Quantity\*

Enter fixed quantity

Add more

Save

Click on save button

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

- Steps: - How to edit the promotion.

- Steps 1: - Click on pencil icon.

Exceltrend OMS

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"/>	

Click on pencil icon.

- Steps 2: - Update the data displayed filed.

Exceltrend OMS

Promotion Type

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% P6 ...

Add more

Update

2022 © B2B CRM

- Steps 3: - Click on update button.

Promotion Type

Number Of Delivery\*  
5

Has Fixed Quantity ?\*  
No

Business Unit\*  
PHILCREST

Brand\*  
CHEMICALS

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

Add more

**Update** Click on update button.

2022 © B2B CRM

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

Promotion Type

No.	Business Unit	Title	Criteria	Fixed Quantity	Status	Action
1	PHILCREST	Moon Dhamaka	Percentage discount + Up to amount limit	No	<input checked="" type="checkbox"/>	<span style="color: blue;">Edit</span> <span style="color: blue;">Delete</span> <span style="color: yellow;">Eye</span>
2	NTMC	Holi Dhamaka	Discount Percentage Range	Yes	<input checked="" type="checkbox"/>	<span style="color: blue;">Edit</span> <span style="color: blue;">Delete</span> <span style="color: yellow;">Eye</span>
3	APBW	Diwali Dhamaka	Discount In Percentage	Yes	<input checked="" type="checkbox"/>	<span style="color: blue;">Edit</span> <span style="color: blue;">Delete</span> <span style="color: yellow;">Eye</span>
4	APBW	Summer Sell	Discount Percentage Range	No	<input checked="" type="checkbox"/>	<span style="color: blue;">Edit</span> <span style="color: blue;">Delete</span> <span style="color: yellow;">Eye</span>
5	APBW	Winder Sell	Discount In Percentage	Yes	<input checked="" type="checkbox"/>	<span style="color: blue;">Edit</span> <span style="color: blue;">Delete</span> <span style="color: yellow;">Eye</span>
6	APBW	Valentine Day	Percentage discount + Up to amount limit	Yes	<input checked="" type="checkbox"/>	<span style="color: blue;">Edit</span> <span style="color: blue;">Delete</span> <span style="color: yellow;">Eye</span>

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

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

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

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

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

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

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

The screenshot shows the 'Promotion Type' page in the Exceltrend OMS system. The left sidebar contains navigation links for 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 area is titled 'Promotion Type' and includes search filters for Select business unit, Select criteria, Select status, and Select fixed quantity. Below these filters is a search bar with 'Search' and 'Clear' buttons. The main content is a table listing six promotion types with columns for No., Business Unit, Title, Criteria, Fixed Quantity, Status, and Action. The 'Status' column contains toggle buttons. A red box highlights one of these buttons, and a red arrow points to it with the text 'Click on toggle button and appear a popup model.'

No.	Business Unit	Title	Criteria	Fixed Quantity	Status	Action
1	PHILCREST	Moon Dhamaka	Percentage discount + Up to amount limit	No	<input checked="" type="checkbox"/>	
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.

The screenshot shows the same 'Promotion Type' page as the previous one, but with a modal dialog box overlaid. The dialog box has a yellow exclamation mark icon at the top and the text 'Are you sure want to change status?'. It contains two buttons: 'Yes, change it!' (highlighted with a red box) and 'Cancel'. Below the dialog box, the table from the previous screenshot is visible, with the note 'click on "Yes, change it!" button the promotion status change.' displayed.

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

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

- Steps: - How to delete the promotion type.

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

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

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

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

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

The screenshot shows the 'Promotion Type' section of the Exceltrend OMS. On the left is a sidebar with various menu items like Dashboard, News & Announcement, Product Management, etc. Under 'Promotion Management', 'Promotion Types' is selected. The main area has tabs for 'Select business unit', 'Select criteria', 'Select status', and 'Select fixed quantity'. Below these are search fields ('Search here...', 'Search', 'Clear') and an 'Export Excel' button, which is highlighted with a red box and a red arrow pointing to it. A table lists six promotion entries with columns for No., Business Unit, Title, Criteria, Fixed Quantity, Status, and Action. Each row has edit and delete icons in the Action column.

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

### 3.3. Claimed Promotions

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

Exceltrend OMS

Claimed Promotions

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.

The screenshot shows the Exceltrend OMS system interface. The left sidebar contains a navigation menu with categories like Dashboard, News & Announcement, Product Management, Promotion Management (selected), Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main content area is titled 'Claimed Promotions' and displays an 'Invoice' for a customer named 'PATACSIIL, DARWIN'. The invoice details a promotion named 'Summer Sell' claimed on February 24, 2022, with a pending status. The invoice table lists two products: 'CST MCT 60/80-17 TL CM619 27P' and 'CST 10.00 R20 16PR CR869(+) TL', both with a quantity of 1. The total amount is P 13,819.02. Below the invoice, there's a 'Delivery details' section with an address field containing 'test' and 'Test'. The delivery table shows two entries: the first product is delivered on March 01, 2022, with a quantity of 1; the second product is delivered on March 02, 2022, with a quantity of 1. A modal window is open at the bottom, asking 'Select a status' with options 'Approved' and 'Canceled', where 'Approved' is highlighted with a red border.

**Customer:**  
PATACSIIL, DARWIN

**Promotion Details:**  
Summer Sell

**Claimed Date:**  
February 24, 2022

**Promotion Status:**  
Pending

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

**Subtotal:** P 14,546.34  
**Discount:** - P 727.32  
**Total:** P 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

**Select a status**

Approved

Canceled

**Claimed Promotions**

**Invoice**

Customer: PATACSIIL, DARWIN

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

Product	Quantity	Price	Discount	Amount
CST MCT 60/80-17 TL 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

**Update Status**

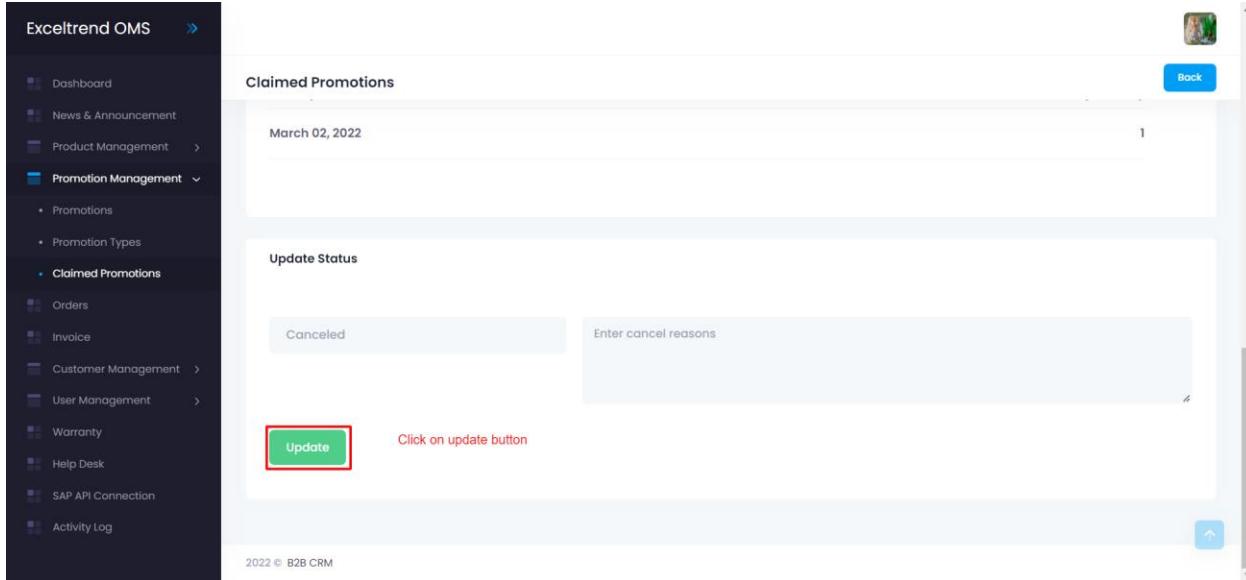
Canceled

Enter cancel reasons

Update

2022 © B2B CRM

- Steps 3: - Click on update button.



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

The screenshot shows the 'Claimed Promotions' list page. The sidebar is identical to the previous screenshot. The main area has a title 'Claimed Promotions' and several search/filter buttons: 'Select Business Unit', 'Select customer', 'Select status', and 'Select date range'. Below these are buttons for 'Search', 'Clear', and 'Export Excel'. A red box highlights the eye icon in the 'Action' column of the first row. The table lists six rows of promotion details:

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

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

**Claimed Promotions**

**Invoice**

Product	Quantity	Price	Discount	Amount
CST MCT 60/80-17 TL CM619 27P	1	₱ 719.00	₱ 35.95	₱ 683.05
CST 10.00 R20 16PR CR869(+) TL	1	₱ 15,572.91	₱ 778.65	₱ 14,794.26

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

**Delivery details**

Delivery Date	Delivery Quantity
March 01, 2022	1

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

Delivery Date	Delivery Quantity
March 01, 2022	1

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

Delivery Date	Delivery Quantity
March 01, 2022	1

#### 4. Orders: -

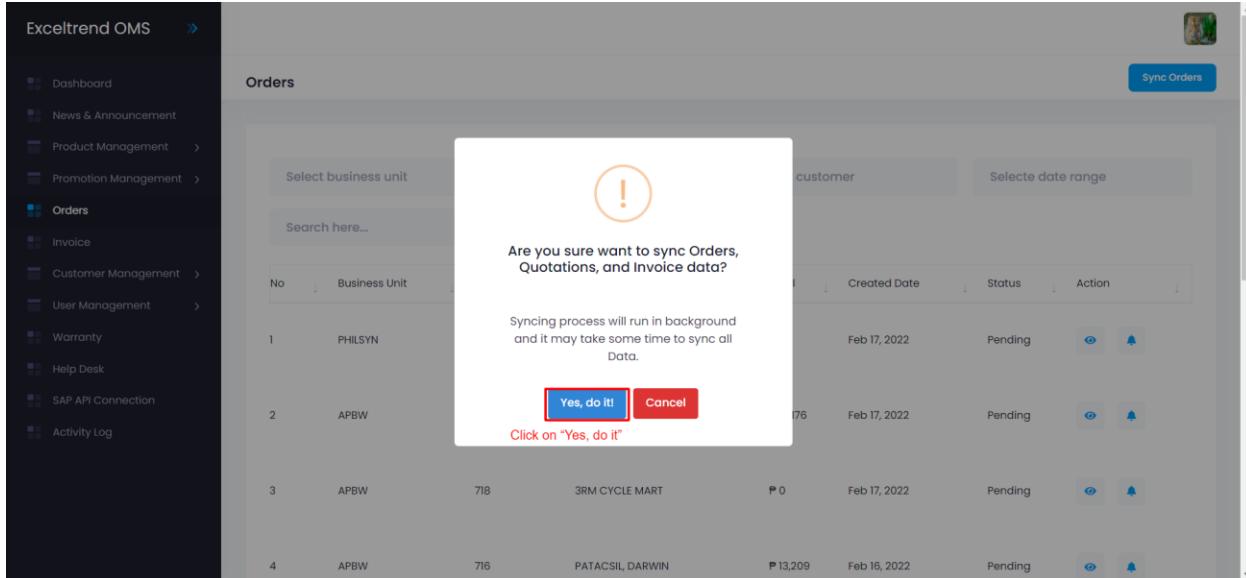
- Admin can sync the order data over here.
- Admin view the orders.
- Admin can notify the customer orders notification.
- Admin can search the data using search box through.
- Admin can use the different-different filter and filter the data.
- Admin can export the order data.
- **Video Link:** - <https://www.screencast.com/t/q2TdetqnWBf>

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

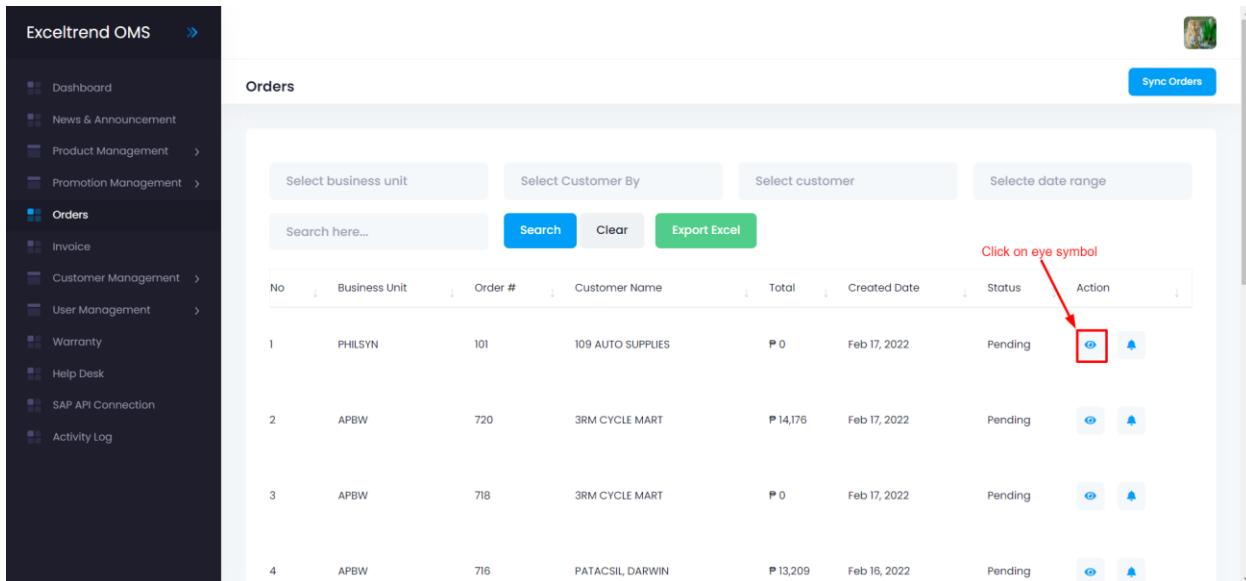
- Steps 1: - Click on sync orders button and appear to pop-up model.

The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar menu with various options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders (which is selected and highlighted in blue), Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main area is titled 'Orders' and displays a table of four orders. The columns are No., Business Unit, Order #, Customer Name, Total, Created Date, Status, and Action. The orders are: 1. PHILSYN, Order # 101, Customer 109 AUTO SUPPLIES, Total P 0, Created Feb 17, 2022, Status Pending. 2. APBW, Order # 720, Customer 3RM CYCLE MART, Total P 14,176, Created Feb 17, 2022, Status Pending. 3. APBW, Order # 718, Customer 3RM CYCLE MART, Total P 0, Created Feb 17, 2022, Status Pending. 4. APBW, Order # 716, Customer PATACSI, DARWIN, Total P 13,209, Created Feb 16, 2022, Status Pending. At the top right of the orders table is a blue button labeled 'Sync Orders'. A red arrow points to this button with the text 'Click on sync orders'.

- 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.



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



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

**Order Details**

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

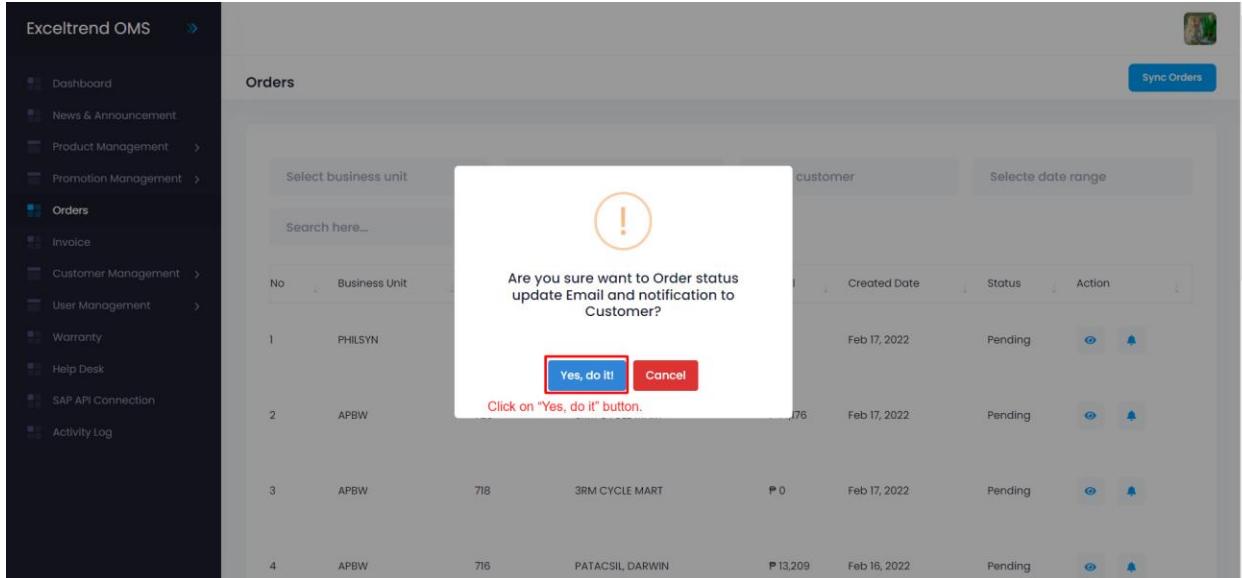
- **Steps: - How to notify the customer orders status.**

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

**Orders**

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

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



## **5. Invoice: -**

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

The screenshot shows the 'Invoices' section of the Exceltrend OMS. At the top, there are four filter options: 'Select business unit', 'Select Customer By', 'Select customer', and 'Select date range'. Below these is a search bar with 'Search here...' placeholder and 'Search' and 'Clear' buttons. The main area displays a table of invoices with columns: No, Business Unit, Invoice #, Customer Name, Total, Created Date, Status, and Action. The table contains six rows of invoice data.

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

The screenshot shows the same 'Invoices' page as above, but with a modal dialog box overlaid. The dialog has a yellow exclamation mark icon and the text 'Are you sure want to sync Invoice data?'. Below this, a note 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: 'Yes, do it!' (highlighted with a red box) and 'Cancel'. A red arrow points to the 'Yes, do it!' button. The background table of invoices is partially visible behind the dialog.

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

The screenshot shows the 'Invoices' section of the Exceltrend OMS. On the left is a dark sidebar with various menu items like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice (which is selected and highlighted in blue), Customer Management, User Management, Warranty, Help Desk, SAP API Connection, and Activity Log. The main area has a header 'Invoices' with a 'Sync Invoices' button. Below the header are four search/filter boxes: 'Select business unit', 'Select Customer By', 'Select customer', and 'Select date range'. A search bar with placeholder 'Search here...' and a 'Search' button are also present. The main table lists six invoices from 'PHILSYN' to 'B SAULO-CERVANTES TRADING'. Each row includes columns for No., Business Unit, Invoice #, Customer Name, Total, Created Date, Status, and Action. The 'Action' column contains an eye icon with a red arrow pointing to it, indicating where to click to view details. The total value for all invoices is ₱ 38,201.

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

The screenshot shows the 'Invoice Details' page for invoice number 385. The top navigation bar includes a back button. The page displays the following details:

Customer Name:	B SAULO-CERVANTES TRADING (Code: AXE0013)	Customer Branch:	BACOLOD	Delivery Address:	PULONG STA. CRUZ, STA. ROSA CITY, LAGUNA 4027 PHILIPPINES		
Sales Specialist:	John Oliver Savedra	Invoice #:	385	Order Date:	November 27, 2020	Status:	Pending
Remarks:	-						

A table below lists the products purchased:

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 24x800mL	November 28, 2020	24	₱ 194	₱ 4,646
Castrol Activ 4T 20W-40 API SL 24x800mL	November 28, 2020	24	₱ 172	₱ 4,118

Total: ₱ 38,201

At the bottom, there is a footer note: 2022 © B2B CRM.

## 6. Customer Management Module: -

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

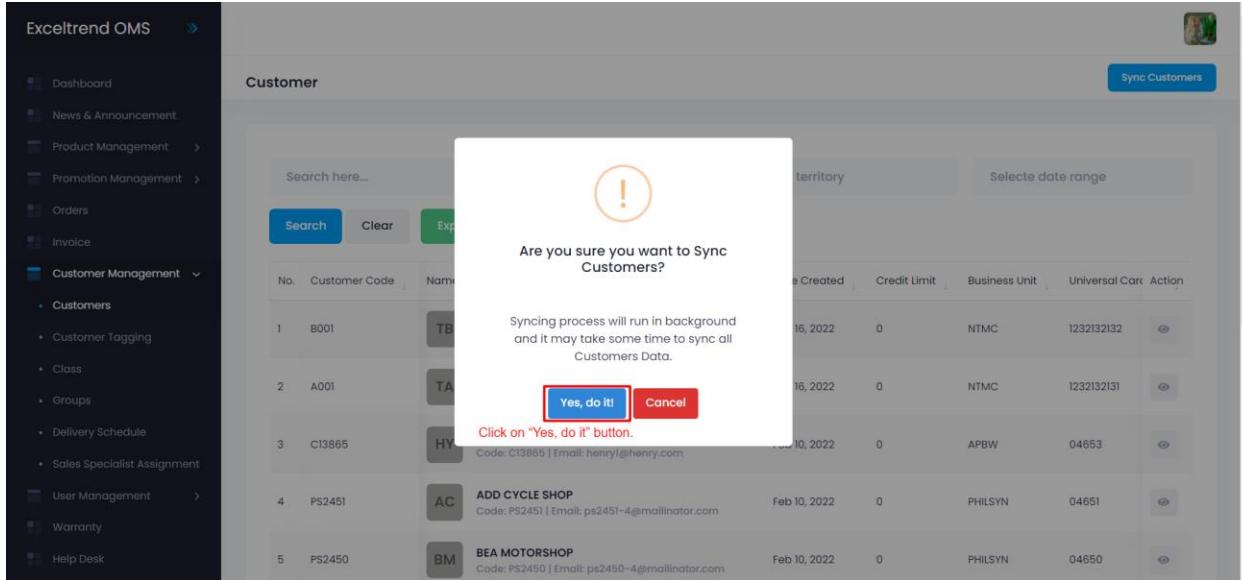
### 6.1. Customers

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

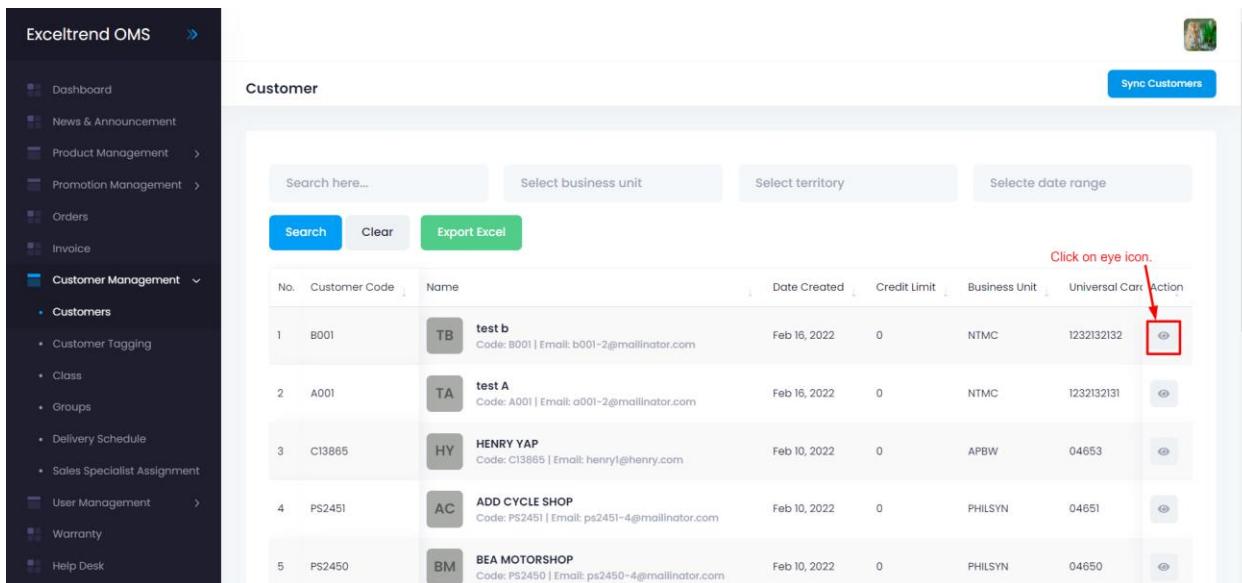
The screenshot shows the Exceltrend OMS Customer Management module. On the left, there's a sidebar with navigation links like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), Customer Tagging, Class, Groups, Delivery Schedule, Sales Specialist Assignment, User Management, Warranty, and Help Desk. The main area is titled 'Customer' and contains a table of customer data. At the top right of the table, there's a blue button labeled 'Sync Customers'. A red box and an arrow point to this button, indicating the step to click. The table has columns for No., Customer Code, Name, Date Created, Credit Limit, Business Unit, Universal Carr, and Action. The data in the table includes:

No.	Customer Code	Name	Date Created	Credit Limit	Business Unit	Universal Carr	Action
1	B001	TB Code: B001   Email: b001-2@mailinator.com	Feb 16, 2022	0	NTMC	I232132132	
2	A001	TA Code: A001   Email: a001-2@mailinator.com	Feb 16, 2022	0	NTMC	I232132131	
3	C13865	HY 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: - 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.



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



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

The screenshot displays the Exceltrend OMS Customer Management system. On the left, a dark sidebar menu lists various modules: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), User Management, Warranty, and Help Desk. Under Customer Management, there are sub-options for Customers, Customer Tagging, Class, Groups, Delivery Schedule, Sales Specialist Assignment, and Contact Person Name.

The main content area shows a "Customer" record for a new customer. The "View Details" section includes fields for Business Unit (NTMC), Card Code (B001), Universal Card Code (I232I32I32), Card Name (test b), Group Name (BACOLOD), OMS Email (b001-2@mailinator.com), and Email (empty). Below this, there are empty fields for Contact Person Name, Class, Address, Territory, Credit Limit (0), Federal Tax ID, Current Account Balance (0), and Created Date (Feb 18, 2022). The Status is listed as Active.

At the bottom, a section titled "Customer's Address Details" shows a table with columns for No., Type, Address, and Street. A message indicates "No data available in table". Below the table, pagination controls show page 10 of 10, with a note "Showing no records".

## 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>

The screenshot shows the 'Customer Tagging' section of the Exceltrend OMS system. The left sidebar has a dark theme with white text and includes links for Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), Customer Tagging (selected), Class, Groups, Delivery Schedule, Sales Specialist Assignment, User Management, and Warranty. The main content area is titled 'Customer Tagging' and contains a search bar with fields for 'Select business unit' and 'Select customer', and buttons for 'Search', 'Clear', and 'Export Excel'. Below the search bar is a table with columns: No., Customer Code, Customer Name, Customer Class, Customer Segment, Market Sector, and Market Sub-Sector. The table lists 100 records, showing various customer details like 'test b', 'test A', and 'HENRY YAP'. At the bottom of the table, it says 'Showing 1 to 100 of 5,440 records' and has a navigation bar with pages 1 through 55.

No.	Customer Code	Customer Name	Customer Class	Customer Segment	Market Sector	Market Sub-Sector
1	B001	test b	-	-	-	-
2	A001	test A	-	-	-	-
3	C13865	HENRY YAP	RA	-	NONE	DLR
4	PS2451	ADD CYCLE SHOP	-	-	-	-
5	PS2450	BEA MOTORSHOP	-	-	-	-
6	C11646E	NARI CYCLE CENTER	RA	-	-	DLR
7	C11646D	RADZ CYCLE CENTER	RA	-	-	DLR
8	C13864	FRED Z. GAILO	RA	-	-	OTHERS
9	C13926	FUZHOU DAOHE LUBRICATING OIL CO.,LTD	RA	-	NONE	OTHERS
10	C00993B	TECH AUTO PARTS AND SERVICES	RA	-	RTL	DLR
11	C13863	SE TIRES & MAGS TRADING	RA	-	-	DLR
12	C13862	TIRE TRADING	RA	-	-	DLR
13	C13861	Z. ZAMORA	RA	-	-	OTHERS
14	C13925	JEVA SUPERMART INC.	RA	-	RTL	OTHERS
15	C13924	DN M. PIOQUINTO	RA	-	MRN	NONE
16	C12929	3 MULTISALES, INC.	RA	-	NONE	NONE
17	C13922	3RATED POWER INDUSTRIES PTE LTD	RA	-	MRN	NONE
18	C13909A	KETTY HANIC ORGANO	RA	-	NONE	NONE
19	C13909B	KETTY HANIC ORGANO	RA	-	NONE	NONE
20	C13909C	KETTY HANIC ORGANO	RA	-	NONE	NONE
21	C13909D	KETTY HANIC ORGANO	RA	-	NONE	NONE
22	C13909E	KETTY HANIC ORGANO	RA	-	NONE	NONE
23	C13909F	KETTY HANIC ORGANO	RA	-	NONE	NONE
24	C13909G	KETTY HANIC ORGANO	RA	-	NONE	NONE
25	C13909H	KETTY HANIC ORGANO	RA	-	NONE	NONE
26	C13909I	KETTY HANIC ORGANO	RA	-	NONE	NONE
27	C13909J	KETTY HANIC ORGANO	RA	-	NONE	NONE
28	C13909K	KETTY HANIC ORGANO	RA	-	NONE	NONE
29	C13909L	KETTY HANIC ORGANO	RA	-	NONE	NONE
30	C13909M	KETTY HANIC ORGANO	RA	-	NONE	NONE
31	C13909N	KETTY HANIC ORGANO	RA	-	NONE	NONE
32	C13909O	KETTY HANIC ORGANO	RA	-	NONE	NONE
33	C13909P	KETTY HANIC ORGANO	RA	-	NONE	NONE
34	C13909Q	KETTY HANIC ORGANO	RA	-	NONE	NONE
35	C13909R	KETTY HANIC ORGANO	RA	-	NONE	NONE
36	C13909S	KETTY HANIC ORGANO	RA	-	NONE	NONE
37	C13909T	KETTY HANIC ORGANO	RA	-	NONE	NONE
38	C13909U	KETTY HANIC ORGANO	RA	-	NONE	NONE
39	C13909V	KETTY HANIC ORGANO	RA	-	NONE	NONE
40	C13909W	KETTY HANIC ORGANO	RA	-	NONE	NONE
41	C13909X	KETTY HANIC ORGANO	RA	-	NONE	NONE
42	C13909Y	KETTY HANIC ORGANO	RA	-	NONE	NONE
43	C13909Z	KETTY HANIC ORGANO	RA	-	NONE	NONE
44	C13909AA	KETTY HANIC ORGANO	RA	-	NONE	NONE
45	C13909AB	KETTY HANIC ORGANO	RA	-	NONE	NONE
46	C13909AC	KETTY HANIC ORGANO	RA	-	NONE	NONE
47	C13909AD	KETTY HANIC ORGANO	RA	-	NONE	NONE
48	C13909AE	KETTY HANIC ORGANO	RA	-	NONE	NONE
49	C13909AF	KETTY HANIC ORGANO	RA	-	NONE	NONE
50	C13909AG	KETTY HANIC ORGANO	RA	-	NONE	NONE
51	C13909AH	KETTY HANIC ORGANO	RA	-	NONE	NONE
52	C13909AJ	KETTY HANIC ORGANO	RA	-	NONE	NONE
53	C13909AK	KETTY HANIC ORGANO	RA	-	NONE	NONE
54	C13909AL	KETTY HANIC ORGANO	RA	-	NONE	NONE
55	C13909AM	KETTY HANIC ORGANO	RA	-	NONE	NONE
56	C13909AN	KETTY HANIC ORGANO	RA	-	NONE	NONE
57	C13909AO	KETTY HANIC ORGANO	RA	-	NONE	NONE
58	C13909AP	KETTY HANIC ORGANO	RA	-	NONE	NONE
59	C13909AQ	KETTY HANIC ORGANO	RA	-	NONE	NONE
60	C13909AR	KETTY HANIC ORGANO	RA	-	NONE	NONE
61	C13909AS	KETTY HANIC ORGANO	RA	-	NONE	NONE
62	C13909AT	KETTY HANIC ORGANO	RA	-	NONE	NONE
63	C13909AU	KETTY HANIC ORGANO	RA	-	NONE	NONE
64	C13909AV	KETTY HANIC ORGANO	RA	-	NONE	NONE
65	C13909AW	KETTY HANIC ORGANO	RA	-	NONE	NONE
66	C13909AX	KETTY HANIC ORGANO	RA	-	NONE	NONE
67	C13909AY	KETTY HANIC ORGANO	RA	-	NONE	NONE
68	C13909AZ	KETTY HANIC ORGANO	RA	-	NONE	NONE
69	C13909BA	KETTY HANIC ORGANO	RA	-	NONE	NONE
70	C13909BB	KETTY HANIC ORGANO	RA	-	NONE	NONE
71	C13909BC	KETTY HANIC ORGANO	RA	-	NONE	NONE
72	C13909BD	KETTY HANIC ORGANO	RA	-	NONE	NONE
73	C13909BE	KETTY HANIC ORGANO	RA	-	NONE	NONE
74	C13909BF	KETTY HANIC ORGANO	RA	-	NONE	NONE
75	C13909BG	KETTY HANIC ORGANO	RA	-	NONE	NONE
76	C13909BH	KETTY HANIC ORGANO	RA	-	NONE	NONE
77	C13909BI	KETTY HANIC ORGANO	RA	-	NONE	NONE
78	C13909BJ	KETTY HANIC ORGANO	RA	-	NONE	NONE
79	C13909BK	KETTY HANIC ORGANO	RA	-	NONE	NONE
80	C13909BL	KETTY HANIC ORGANO	RA	-	NONE	NONE
81	C13909BM	KETTY HANIC ORGANO	RA	-	NONE	NONE
82	C13909BN	KETTY HANIC ORGANO	RA	-	NONE	NONE
83	C13909BO	KETTY HANIC ORGANO	RA	-	NONE	NONE
84	C13909BP	KETTY HANIC ORGANO	RA	-	NONE	NONE
85	C13909BQ	KETTY HANIC ORGANO	RA	-	NONE	NONE
86	C13909BR	KETTY HANIC ORGANO	RA	-	NONE	NONE
87	C13909BS	KETTY HANIC ORGANO	RA	-	NONE	NONE
88	C13909BT	KETTY HANIC ORGANO	RA	-	NONE	NONE
89	C13909BU	KETTY HANIC ORGANO	RA	-	NONE	NONE
90	C13909BV	KETTY HANIC ORGANO	RA	-	NONE	NONE
91	C13909BW	KETTY HANIC ORGANO	RA	-	NONE	NONE
92	C13909BX	KETTY HANIC ORGANO	RA	-	NONE	NONE
93	C13909BY	KETTY HANIC ORGANO	RA	-	NONE	NONE
94	C13909BZ	KETTY HANIC ORGANO	RA	-	NONE	NONE
95	C13909CA	KETTY HANIC ORGANO	RA	-	NONE	NONE
96	C13909CB	KETTY HANIC ORGANO	RA	-	NONE	NONE
97	C13909CC	KETTY HANIC ORGANO	RA	-	NONE	NONE
98	C13909CD	KETTY HANIC ORGANO	RA	-	NONE	NONE
99	C13909CE	KETTY HANIC ORGANO	RA	-	NONE	NONE
100	C13909CF	KETTY HANIC ORGANO	RA	-	NONE	NONE

### 6.3. Class

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

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

### 6.4. Groups

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

The screenshot shows the 'Customer Group' section of the Exceltrend OMS. On the left is a dark sidebar with various menu items. The 'Customer Management' section is expanded, showing 'Groups' as one of the options. The main area displays a table of customer groups with columns for No., Business Unit, Code, and Name. At the top right of the table, there is a blue button labeled 'Sync Customer Groups'. A red arrow points from the text 'Click on sync customer group button' to this button.

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.

This screenshot shows the same 'Customer Group' page as above, but with a modal dialog box overlaid. The dialog has a large orange exclamation mark icon at the top. Below it, the text reads: 'Are you sure you want to Sync Customer Groups?'. Underneath, a smaller note says: 'Syncing process will run in background and it may take some time to sync all Customer Groups Data.' At the bottom of the dialog are two buttons: a blue 'Yes, do it!' button and a red 'Cancel' button. A red box highlights the 'Yes, do it!' button. To the right of the dialog, the main table of customer groups is visible, with the 'Sync Customer Groups' button at the top right of the table header.

## 6.5. Delivery Schedule

- Admin can create, edit, update and delete the customer delivery schedule.
- Admin can search the data using search box.
- Admin can use the different-different filter and filter the data.
- **Video Link:** - <https://www.screencast.com/t/d3KqvXTCe>
  
- **Steps: - How to create a customer delivery schedule.**
  - Steps 1: - Click on new schedule button.

The screenshot shows the 'Customer Delivery Schedule' page within the Exceltrend OMS system. The left sidebar has a dark theme with white text. The 'Customer Management' section is expanded, showing 'Customers', 'Customer Tagging', 'Class', 'Groups', and 'Delivery Schedule'. The 'Delivery Schedule' option is selected and highlighted in blue. The main content area has a light gray background. At the top right of the table, there are two buttons: 'View All Schedule' and 'New Schedule'. The 'New Schedule' button is highlighted with a red box and a red arrow pointing to it from below, with the text 'Click on a new schedule button.' above the arrow. The table itself has columns for 'No.', 'Customer', 'Territory', and 'Action'. Each row contains a set of three icons for editing, deleting, and viewing details. The first six rows have territories listed (AGUSAN DEL NORTE, AGUSAN DEL NORTE, AGUSAN DEL NORTE, ABRA, BATANGAS, BATANGAS), while the last row is labeled '-No Territory-'.

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

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

**Customer Delivery Schedule**

**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

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

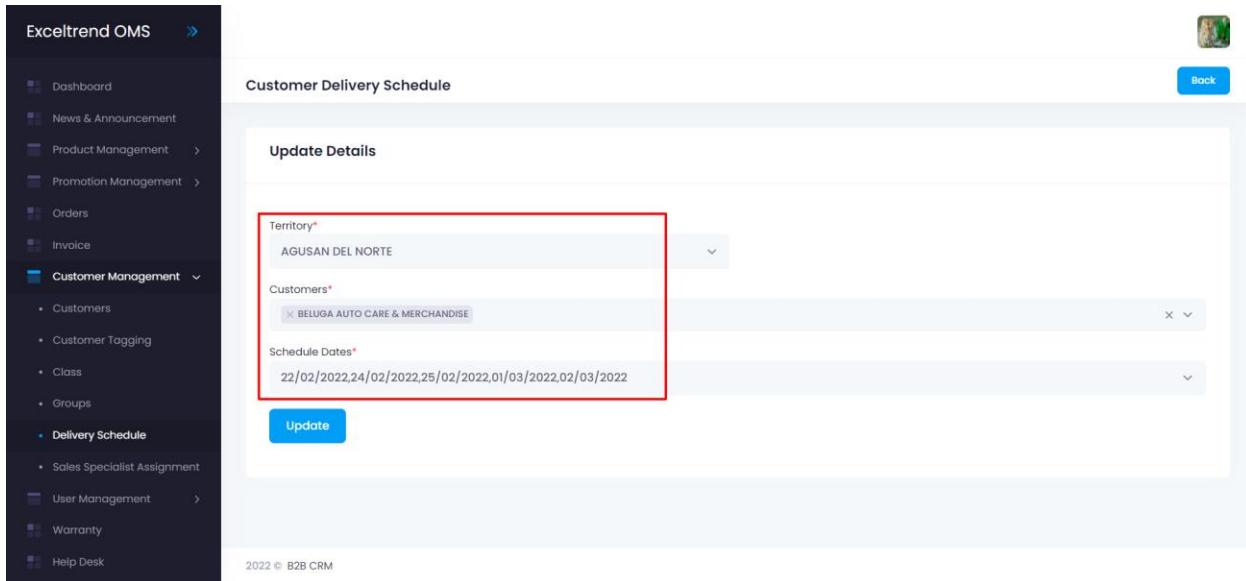
No.	Customer	Territory	Action
1	BELUGA AUTO CARE & MERCHANDISE	AGUSAN DEL NORTE	
2	AISIN AUTO SUPPLY	AGUSAN DEL NORTE	
3	ADFIL CORPORATION	AGUSAN DEL NORTE	
4	ESTRADA, MA. CHEZKA P.	ABRA	
5	PHILIPPINES TRC INC.	BATANGAS	
6	PARAMOUNT MARKETING	BATANGAS	
7	ADIONG, WARLY	-No Territory-	

○ Steps: - How to edit the delivery schedule

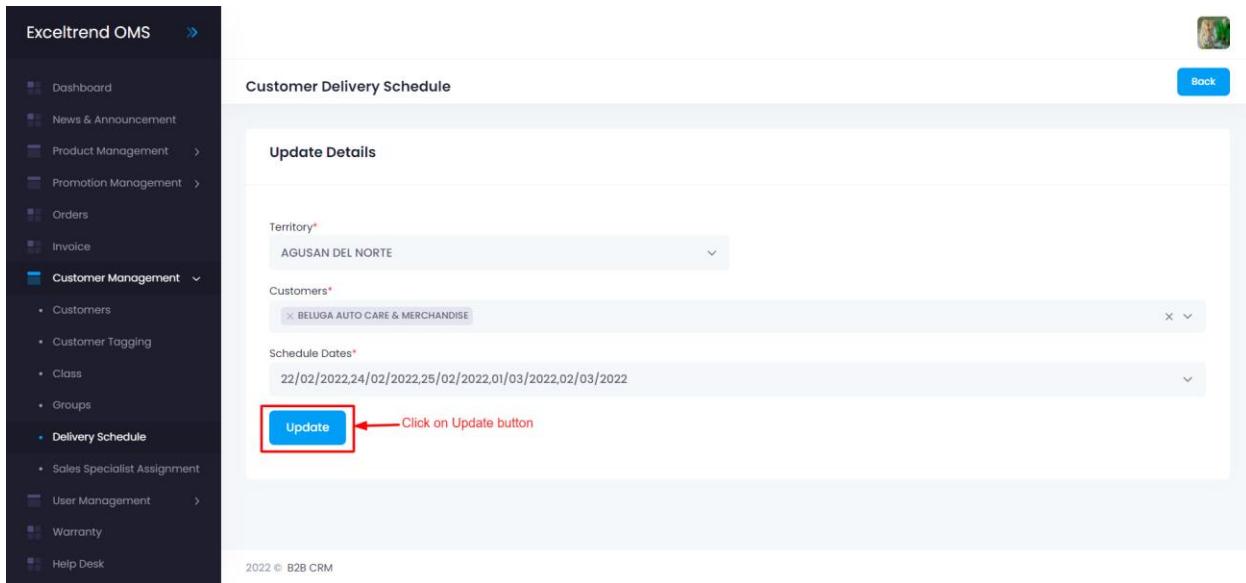
- Steps: - 1 Click on edit icon.

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

- Steps: - 2 Update the data.



- Steps: - 3 Click on Update button.



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

The screenshot shows the 'Customer Delivery Schedule' page. On the left is a dark sidebar with various menu items under 'Customer Management'. The main area has a search bar, a territory selector, and a 'Search' button. Below is a table with columns: No., Customer, Territory, and Action. The 'Action' column contains icons for edit, delete, and more. An arrow points to the eye icon in the 'Action' column for the first row, which is highlighted with a red box.

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

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

The screenshot shows a detailed calendar view for the customer 'BELUGA AUTO CARE & MERCHANDISE'. The top bar shows the customer name. Below is a 'Schedule Details' section with a header for each year from 2020 to 2024. Each header has a back and forward navigation button. Below the headers are monthly calendar grids for January through August. Specific dates are highlighted in green, such as January 1st, February 24th, March 2nd, June 24th, and July 2nd, representing scheduled delivery dates.

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

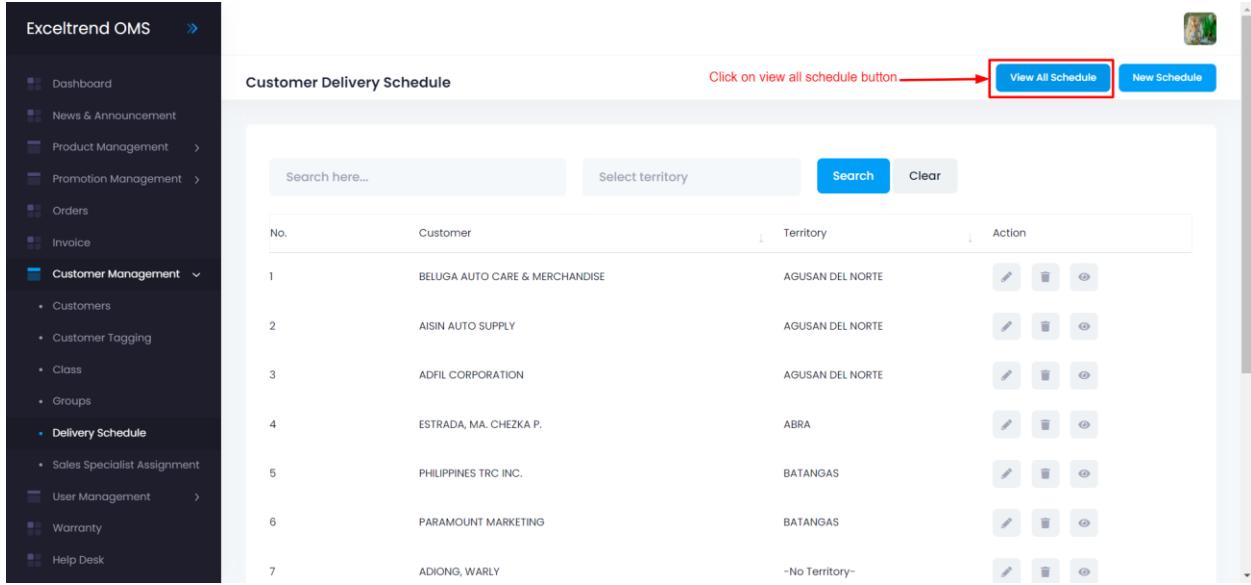
The screenshot shows the 'Customer Delivery Schedule' page within the Exceltrend OMS system. On the left is a dark sidebar with various menu items under 'Customer Management'. The main area displays a table with columns: No., Customer, Territory, and Action. The 'Action' column contains icons for edit, delete, and details. A red box highlights the delete icon for the first row, and a red arrow points to it with the instruction 'Click on trash icon'.

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

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

The screenshot shows the same 'Customer Delivery Schedule' page after a deletion attempt. A modal dialog box is centered over the table, containing a large exclamation mark icon and the text 'Are you sure? Once deleted, you will not be able to recover this record!'. At the bottom of the dialog are two buttons: 'Yes, delete it!' (highlighted with a red box) and 'Cancel'. A red arrow points to the 'Yes, delete it!' button with the instruction 'Click on "Yes, delete it!" Button'.

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



The screenshot shows the 'Customer Delivery Schedule' page within the Exceltrend OMS system. The left sidebar contains a navigation menu with categories like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), Delivery Schedule (selected), Sales Specialist Assignment, User Management, Warranty, and Help Desk. The main content area is titled 'Customer Delivery Schedule' and includes a search bar with fields for 'Search here...', 'Select territory', 'Search', and 'Clear'. Below the search bar is a table with the following data:

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

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

**Exceltrend OMS**

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

### Customer Delivery Schedule

Select Customer

Select customer

Schedule Details

February 2022

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

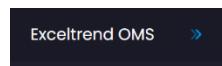
2022 © B2B CRM

The screenshot shows the 'Customer Delivery Schedule' page of the Exceltrend OMS system. On the left, a dark sidebar menu lists various modules: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), Delivery Schedule (selected), User Management, Warranty, and Help Desk. The 'Customer Management' and 'Delivery Schedule' sections are expanded, showing sub-options like Customers, Customer Tagging, Class, Groups, Sales Specialist Assignment, and +6 more for Delivery Schedule.

The main content area is titled 'Customer Delivery Schedule'. It features a 'Select Customer' input field with placeholder text 'Select customer'. Below this is a list of customers:

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

A red box highlights the first four items in this list. To the right of the list, a note says 'Select the customer name'. Below the list is a grid representing a delivery schedule for weeks 6 through 12. The grid shows assignments for different customers across these weeks. For example, week 8 has entries for ABATO, RICHARD (Code: I) and ABELLANA, RUBETH (Code: C01). Week 10 has an entry for 007ENCARR TIRE TRADING. Week 11 has an entry for D07ENCARR TIRE TRADING. Week 12 has an entry for 1-STOP-AUTOSHOP AUTO. A note '+6 more' is visible near the bottom of the grid.



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

2022 © B2B CRM

## 6.6. Sales Specialist Assignment

- Admin can create, edit, update and delete the Sales Specialist Assignment.
- Admin can search the data using search box.
- Admin can use the different-different filter and filter the data.
- Admin can upload the assignment using excel sheet through.
- **Video Link:** - <https://www.screencast.com/t/GWUxUCdxknyH>
  
- **Steps: - How to create a sales specialist assignment.**
  - Steps 1: - Click on new assignment button.

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

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

The screenshot shows the 'Assign Sales Specialist' form in the Exceltrend OMS system. The left sidebar contains a navigation menu with categories like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), Customers, Customer Tagging, Class, Groups, Delivery Schedule, Sales Specialist Assignment (selected), User Management, Warranty, and Help Desk. The main form area is titled 'Assign Sales Specialist' and has a sub-section 'Add Details'. It includes fields for 'Business Unit\*', 'Customer\*', 'Sales Specialist\*', 'Product Brand', 'Product Line', and 'Product Category'. A blue 'Save' button is located at the bottom left of the form.

- Steps 3: - Click on save button.

This screenshot is identical to the one above, showing the 'Assign Sales Specialist' form in the Exceltrend OMS system. However, it features a red arrow pointing to the blue 'Save' button at the bottom left of the form, with the text 'Click on save button.' written next to the arrow, providing a visual guide for the user.

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

The screenshot shows the 'Customers Sales Specialist' listing page. The sidebar on the left has 'Customer Management' selected under 'Customer Management'. The main area displays a table with columns: No., Business Unit, Customer, and Action. The table contains 7 rows of data. Each row has an 'Edit' icon highlighted with a red box and an arrow pointing to it, indicating where to click to edit the assignment.

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	55ZAIKEN TRANSPORT CORP.	
7	APBW	5N PLAINFIELD MARKETING INC	

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

The screenshot shows the same 'Customers Sales Specialist' listing page as the previous one. The 'Edit' icon in the first row's 'Action' column is highlighted with a red box and an arrow pointing to it, indicating the specific step to click for editing.

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	55ZAIKEN TRANSPORT CORP.	
7	APBW	5N PLAINFIELD MARKETING INC	

- Steps: - 2 Update the data.

The screenshot shows the 'Assign Sales Specialist' form in the Exceltrend OMS system. The left sidebar has a dark theme with various menu items like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management (selected), Sales Specialist Assignment, User Management, Warranty, and Help Desk. The main area is titled 'Assign Sales Specialist' and 'Update Details'. It contains fields for Business Unit (APBW), Customer (A.G. COMBE T/S), Sales Specialist (multiple entries of ALBERT OPENA), Product Brand (CST, CST-MCT, DELKOR, FLAPS & TUBES), Product Line (Select Product Line), and Product Category (ATV, BANANA, BATTERY, FLAGSHIP, FLAPS). A blue 'Update' button is at the bottom.

- Steps: - 3 Click on Update button.

This screenshot is identical to the previous one, showing the 'Assign Sales Specialist' form. However, a red arrow points to the blue 'Update' button at the bottom left of the form, indicating where the user should click to save the changes.

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

**Customers Sales Specialist**

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

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

**Customer : A.H. SHOPPER'S MART**

Sales Specialist

- ALBERT OPENA
- ALBERT OPENA
- ALBERT OPENA

Product Brand

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

Product Line

Product Category

- ATV
- BANANA
- BATTERY
- FLAGSHIP
- FLAPS

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

The screenshot shows the 'Customer Sales Specialist' page within the Exceltrend OMS system. On the left is a dark sidebar with various management options like Dashboard, News & Announcement, Product Management, etc. The main area has a header 'Customers Sales Specialist' with buttons for 'Upload Assignment' and 'New Assignment'. Below is a table with columns: No., Business Unit, Customer, and Action. The 'Action' column contains icons for edit, delete, and view. The first row's delete icon is highlighted with a red box and an arrow pointing to it from the top right.

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

- Steps 2: - 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 after a row has been selected for deletion. A modal dialog box is centered over the table, containing a large exclamation mark icon and the text 'Are you sure?'. Below it, a smaller message reads 'Once deleted, you will not be able to recover this record!'. At the bottom of the dialog are two buttons: 'Yes, delete it!' and 'Cancel'. A red box highlights the 'Yes, delete it!' button. The background table rows are dimmed.

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

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

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	5SZAIDEN 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. The left sidebar is identical to the previous screenshot. The main area is titled 'Upload Sales Specialist Assignment'. It features a 'Choose File' input field which displays 'No file chosen'. To the right of this field is a 'Sample Excel' button. Below the input field is a 'Save' button. At the bottom of the page, it says '2022 © B2B CRM'.

- Steps 3: - Click on save button.

The screenshot shows the Exceltrend OMS software interface. On the left, there is a dark sidebar with a navigation menu. The 'Customer Management' section is expanded, showing 'Customers', 'Customer Tagging', 'Class', 'Groups', 'Delivery Schedule', and 'Sales Specialist Assignment'. The 'Sales Specialist Assignment' item is highlighted with a blue square. The main content area has a title 'Upload Sales Specialist Assignment'. It contains a 'Upload Excel\*' input field with a 'Choose File' button and a message 'No file chosen'. There is also a 'Sample Excel' button. At the bottom of the main area, there is a 'Save' button, which is highlighted with a red box and a red arrow pointing to it, indicating the next step. The top right corner shows a user profile icon and a 'Back' button. The bottom right corner of the main area says '2022 © B2B CRM'.

## 7. User Management Module: -

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

### 7.1. User

- Admin can create, edit, update and delete the user.
- Admin can filter through filter the data.
- Admin can use the different-different filter and filter the data.
- Only Admin can sync the sales specialist data.
- **Video Link:** - <https://www.screencast.com/t/YVfrbrrv0DC>
  - **Steps:** - How to create a new user.
    - Steps 1: - Click on create button.

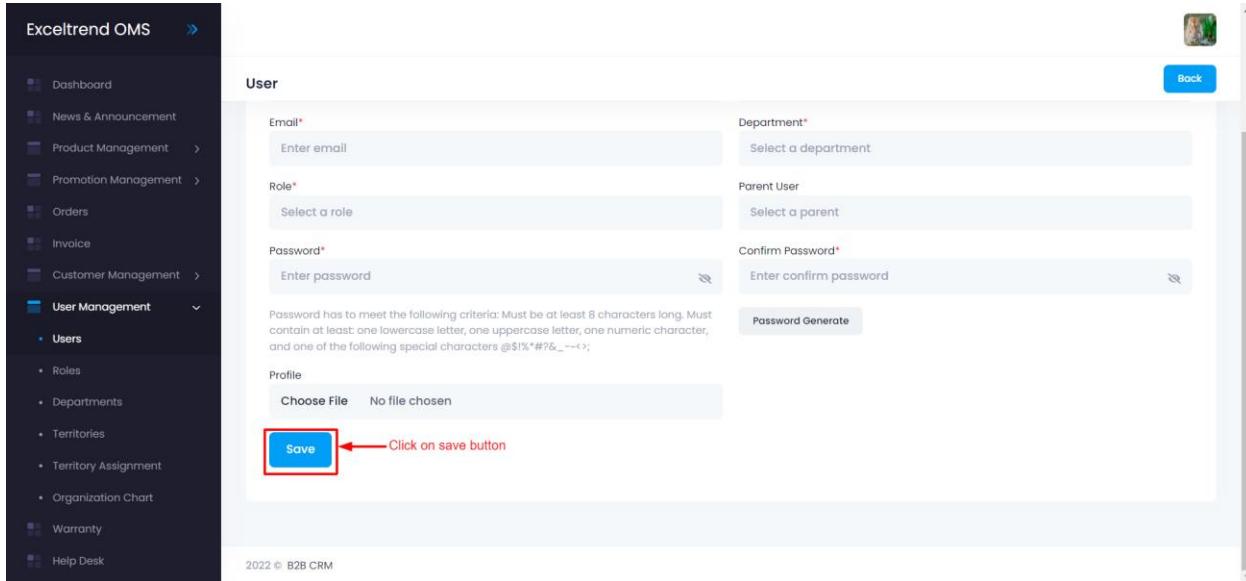
The screenshot shows the 'User' management page within the Exceltrend OMS system. On the left, a dark sidebar menu lists various modules like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, and User Management (which is currently selected). The main content area displays a table of existing users with columns for No., Role, First Name, Last Name, Email, Status, and Action. A red arrow points to the 'Create' button in the top right corner of the table header.

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.

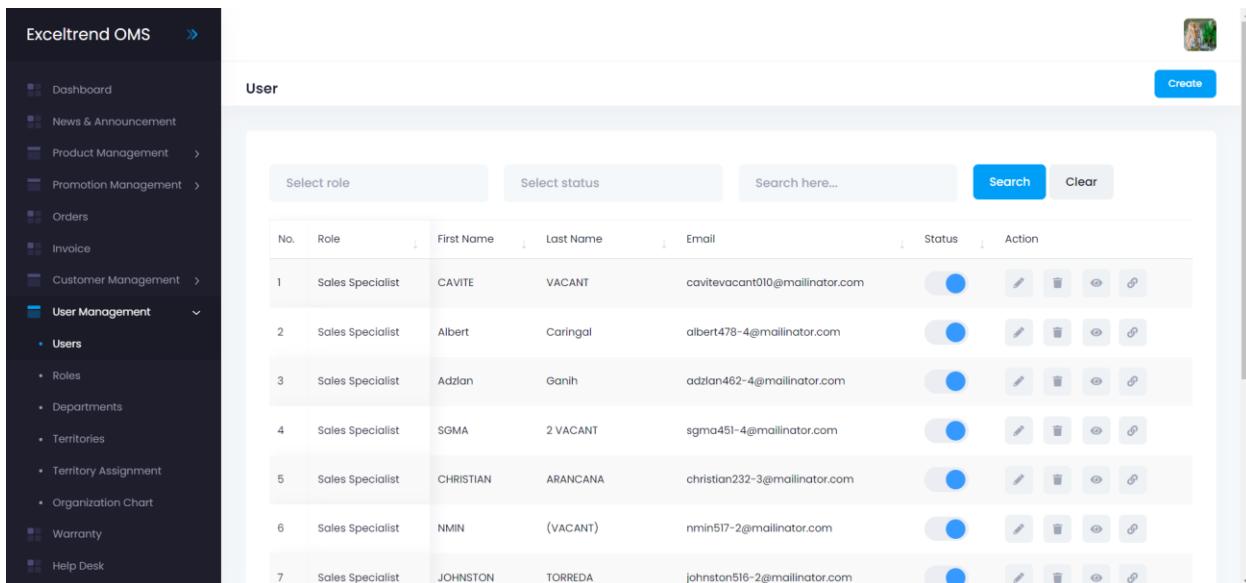
The screenshot shows the 'Add Details' form for creating a new user. The form is divided into several sections: 'First Name\*' and 'Last Name\*', both with input fields; 'Email\*' and 'Department\*', both with dropdown menus; 'Role\*' and 'Parent User', both with dropdown menus; 'Password\*' and 'Confirm Password\*', both with input fields and a 'Password Generate' button between them; and a 'Profile' section with a 'Choose File' button and a placeholder 'No file chosen'. A note at the bottom states: '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 @#\$%^&\_-->;'.

▪ Steps 3: - Click on save button.



The screenshot shows the 'User' creation form in the Exceltrend OMS system. The left sidebar shows the navigation menu with 'User Management' selected. The main form has fields for Email\*, Department\*, Role\*, Password\*, and Profile (with a file upload field). A note at the bottom of the form states: '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 @#\$%^&\*()\_+-=<>'. A blue 'Save' button is at the bottom-left of the form, with a red box and an arrow pointing to it, indicating where to click to save the user.

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



The screenshot shows the 'User' listing page in the Exceltrend OMS system. The left sidebar shows the navigation menu with 'User Management' selected. The main page features a search bar with filters for 'Select role' and 'Select status', and a 'Search' button. Below is a table of user records:

No.	Role	First Name	Last Name	Email	Status	Action
1	Sales Specialist	CAVITE	VACANT	cavitevacant01@mailinator.com	<input checked="" type="checkbox"/>	<span>edit</span> <span>trash</span> <span>eye</span> <span>print</span>
2	Sales Specialist	Albert	Caringal	albert478-4@mailinator.com	<input checked="" type="checkbox"/>	<span>edit</span> <span>trash</span> <span>eye</span> <span>print</span>
3	Sales Specialist	Adzlan	Ganih	adzlan462-4@mailinator.com	<input checked="" type="checkbox"/>	<span>edit</span> <span>trash</span> <span>eye</span> <span>print</span>
4	Sales Specialist	SGMA	2 VACANT	sgma451-4@mailinator.com	<input checked="" type="checkbox"/>	<span>edit</span> <span>trash</span> <span>eye</span> <span>print</span>
5	Sales Specialist	CHRISTIAN	ARANCANA	christian232-3@mailinator.com	<input checked="" type="checkbox"/>	<span>edit</span> <span>trash</span> <span>eye</span> <span>print</span>
6	Sales Specialist	NMIN	(VACANT)	nmin517-2@mailinator.com	<input checked="" type="checkbox"/>	<span>edit</span> <span>trash</span> <span>eye</span> <span>print</span>
7	Sales Specialist	JOHNSTON	TORREDA	johnston516-2@mailinator.com	<input checked="" type="checkbox"/>	<span>edit</span> <span>trash</span> <span>eye</span> <span>print</span>

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

The screenshot shows the 'User' management page within the Exceltrend OMS system. On the left is a dark sidebar menu with various modules like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, and User Management. Under User Management, there's a 'Users' section. The main area is titled 'User' and contains a table with columns: No., Role, First Name, Last Name, Email, Status, and Action. The 'Action' column includes icons for edit, delete, and other details. A red box highlights the edit icon (pencil) for the first user row.

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 a user. It has two tabs: 'Update Details' and 'Update Password'. The 'Update Details' tab is active, showing fields for First Name\*, Last Name\*, Email\*, Department\*, Role\*, and Profile. The 'Email\*' field contains 'cavitevacant010@mailinator.com' and the 'Department\*' field contains 'Sales'. The 'Role\*' field contains 'Sales Specialist' and the 'Parent User' dropdown is set to 'Select Parent User'. There's a 'Choose File' button with 'No file chosen'. The 'Update' button is at the bottom. The 'Update Password' tab is also visible below it.

- Steps 3: - Click on update button.

The screenshot shows the 'User Management' section under 'User'. It displays a form for updating user details. The 'Update' button at the bottom left is highlighted with a red box and a red arrow pointing to it, with the text 'Click on update button' next to it.

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		
<input type="button" value="Update"/> <span style="color: red;">Click on update button</span>			

- Steps: - How to view the user details.

- Steps 1: - Click on eye icon.

The screenshot shows the 'User Management' section under 'User'. It displays a list of users with columns for No., Role, First Name, Last Name, Email, Status, and Action. The 'Action' column contains icons for edit, delete, and other operations. A red box highlights the eye icon in the first row's action column, with a red arrow pointing to it and the text 'Click on eye icon'.

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

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

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

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

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

The screenshot shows the Exceltrend OMS User Management page. 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. A red box highlights the "Status" column for the first row (No. 1, Sales Specialist, CAVITE).

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.

The screenshot shows the same Exceltrend OMS User Management page as before, 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 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 and sidebar remain the same.

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

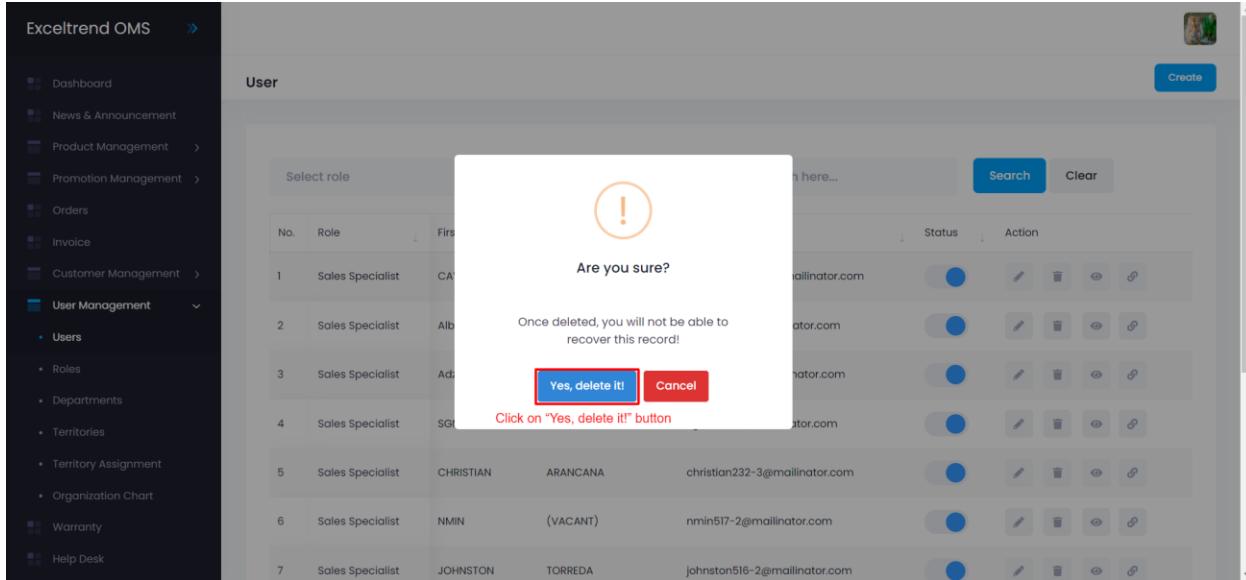
The screenshot shows the 'User' management page within the Exceltrend OMS system. The left sidebar includes options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (selected), Roles, Departments, Territories, Territory Assignment, Organization Chart, Warranty, and Help Desk. The main area is titled 'User' and contains a table with columns: No., Role, First Name, Last Name, Email, Status, and Action. The 'Status' column header is highlighted with a red box. The table rows list various user entries, each with a set of edit, delete, and view icons in the 'Action' column.

○ Steps: - How to delete the user.

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

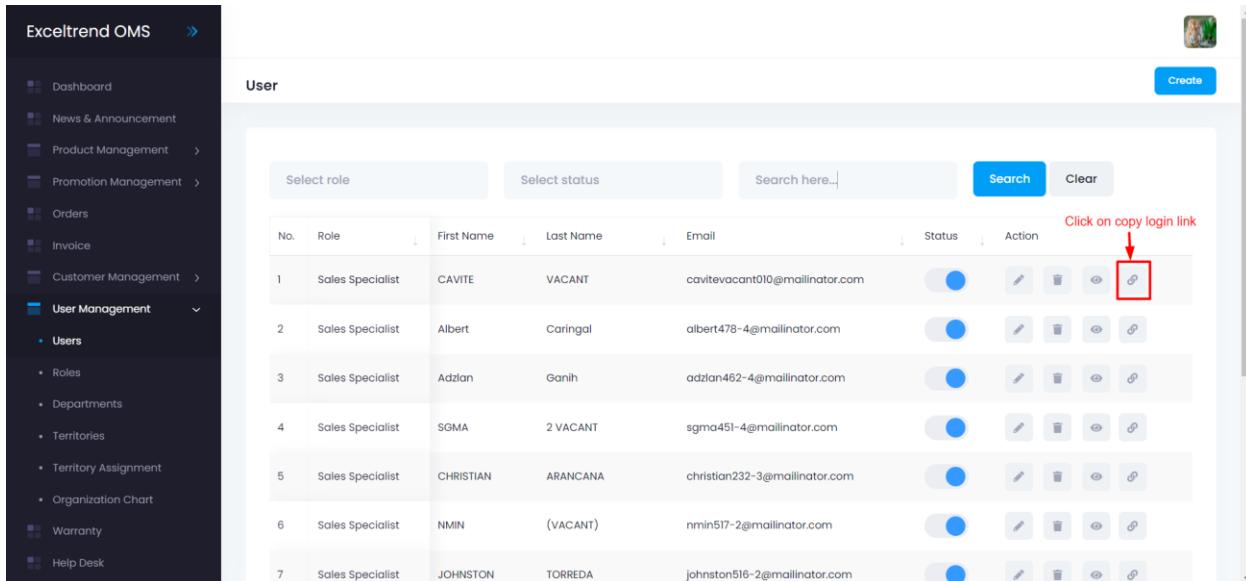
This screenshot is similar to the previous one but focuses on the first user entry in the list. A red box highlights the trash icon in the 'Action' column of the first row. A red arrow points to this icon with the text 'Click on trash icon'. The rest of the interface and data are identical to the first 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.

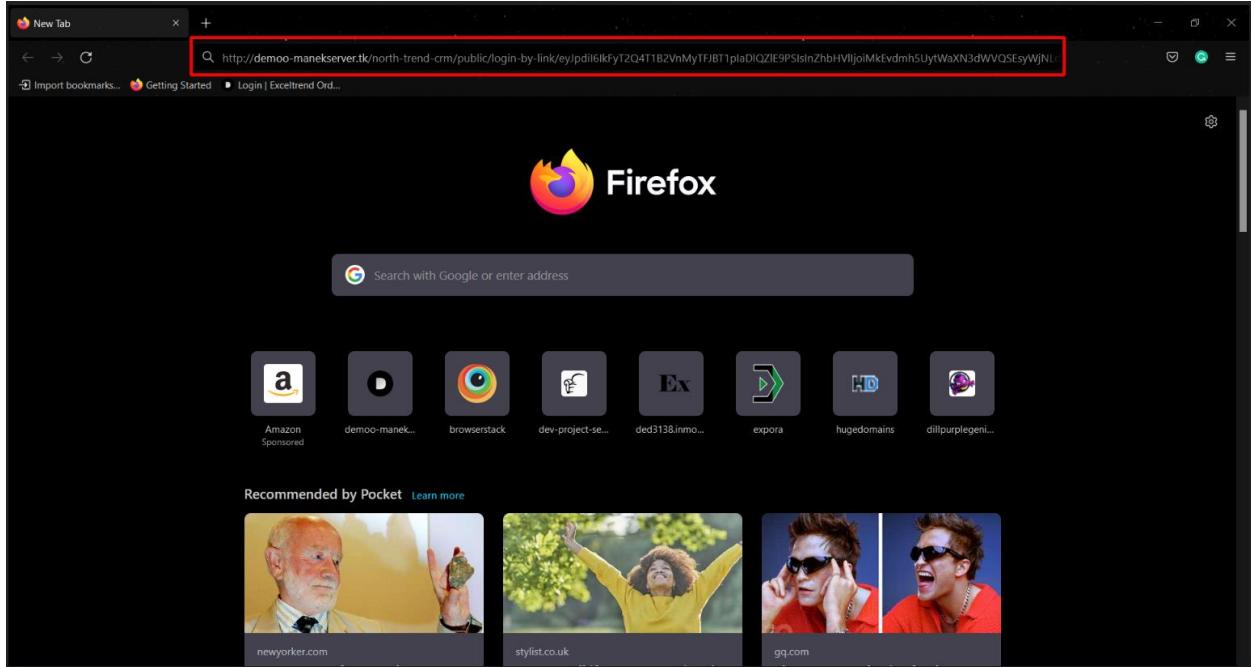


- Steps: - How to direct login for particular user.

- Steps 1: - Click on copy login link.



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



## 7.2. Roles

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

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

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

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

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

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

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

The screenshot shows the Exceltrend OMS system's Role Management interface. On the left, a dark sidebar menu lists various modules: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (selected), Users, Roles, Departments, Territories, Territory Assignment, Organization Chart, Warranty, and Help Desk. The 'User Management' section is expanded, showing 'Roles' and other sub-options. The main content area is titled 'Role' and contains 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). A large red box highlights the 'Select Access\*' dropdown menu, which is open and displays a hierarchical list of permissions categorized by module: User Management (Role, User, Department), Customer Management (Class, Customer, Customer Group), Product Management (Product, Product Brand), Order, Invoice, My Promotions, and Product List. Each category has sub-options for Add, Edit, View, and Delete. At the bottom of the 'Add Details' form is a blue 'Save' button. The footer of the page includes the text '2022 © B2B CRM' and a small user profile icon.

■ Steps 4: - Click on save button.

The screenshot shows the 'Role' creation interface. On the left is a dark sidebar with navigation links like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (selected), and Help Desk. The main area has tabs for 'Role' and 'Add Details'. Under 'Add Details', there are fields for 'Role Name\*' (with placeholder 'Enter role name'), 'Parent' (with placeholder 'Select a parent'), and 'Select Access\*' (with placeholder 'Select Access'). A list of access items is shown with checkboxes, none of which are checked. At the bottom is a blue 'Save' button, which is highlighted with a red box and a red arrow pointing to it. The status bar at the bottom says '2022 © B2B CRM'.

○ Steps: - How edit the role.

■ Steps 1: - Click on pencil icon.

The screenshot shows the 'Role' list interface. The sidebar is identical to the previous screenshot. The main area has tabs for 'Role Chart' and 'Create'. Below is a table with columns: No., Name, Parent, Access, and Action. The table contains four rows with data: 1. Sales\_Tesr, Sales Specialist, All Module Access, with a pencil icon in the Action column. 2. Customer, -, Custom Module Access, with a pencil icon in the Action column. 3. Support, -, All Module Access, with a pencil icon in the Action column. 4. Sales Specialist, -, Custom Module Access, with a pencil icon in the Action column. A red box highlights the pencil icon in the Action column of the first row. The status bar at the bottom says '2022 © B2B CRM'.

- Steps 2: - Update the data.

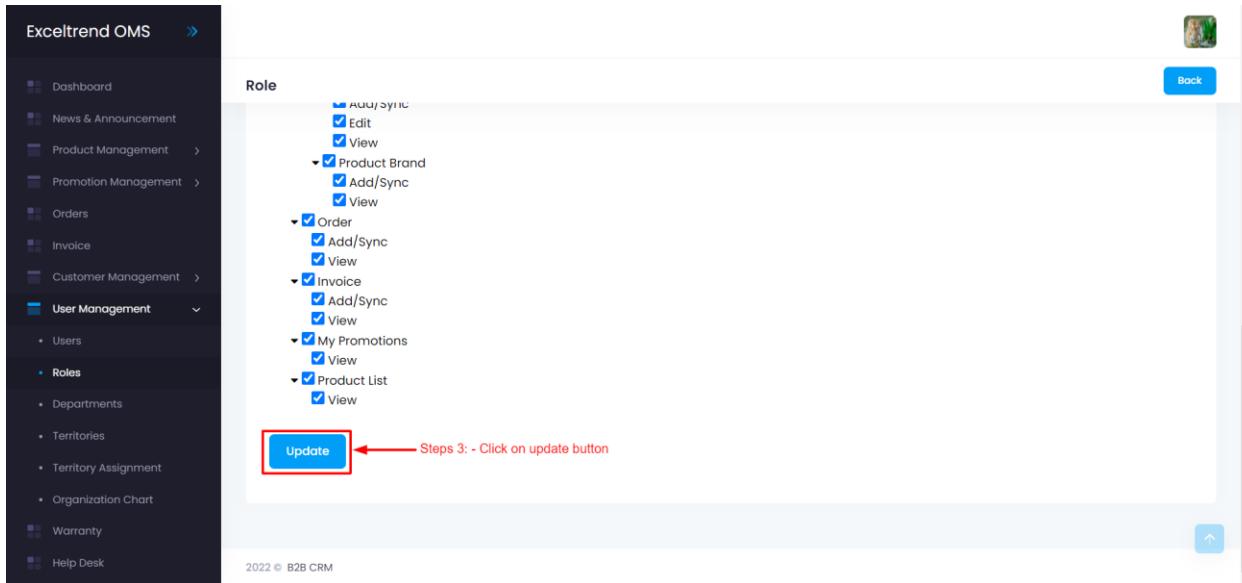
The screenshot shows the 'Role' management screen in the Exceltrend OMS system. The left sidebar lists various management modules: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (selected), Users, Roles, Departments, Territories,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

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

The permissions section displays a hierarchical list of checked checkboxes:

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

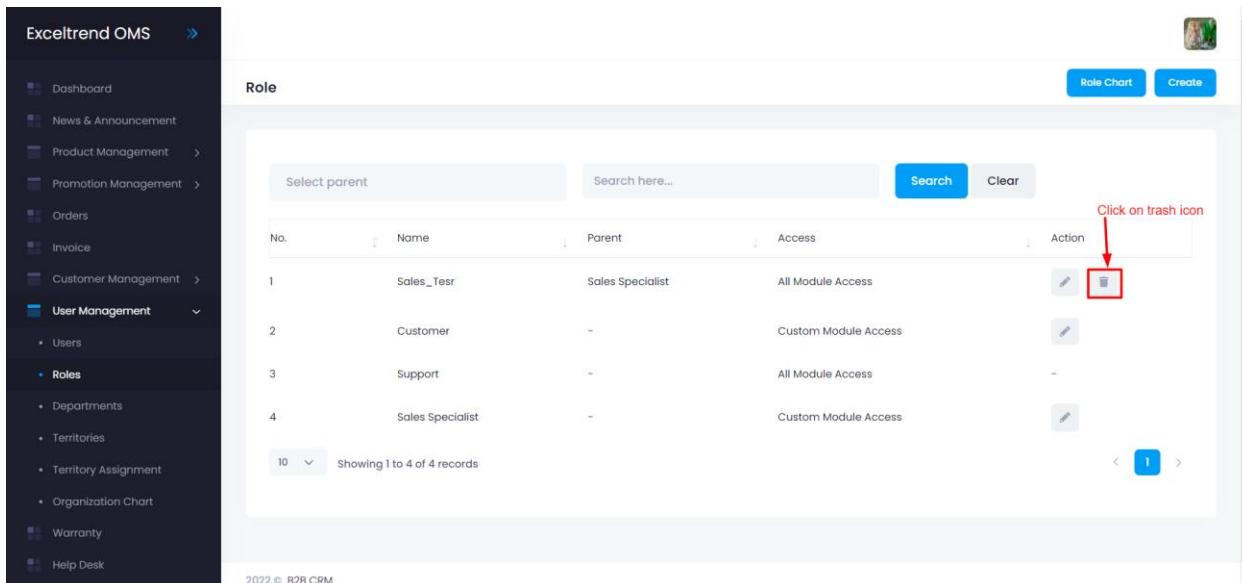
- Steps 3: - Click on update button.



The screenshot shows the 'Role' management screen in the Exceltrend OMS. On the left is a sidebar with navigation links like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (selected), and Help Desk. The main area displays a hierarchical list of roles with checkboxes for various permissions such as Add/Sync, Edit, View, etc. At the bottom of the list is a blue 'Update' button, which is highlighted with a red box and a red arrow pointing to it from the text 'Steps 3: - Click on update button'.

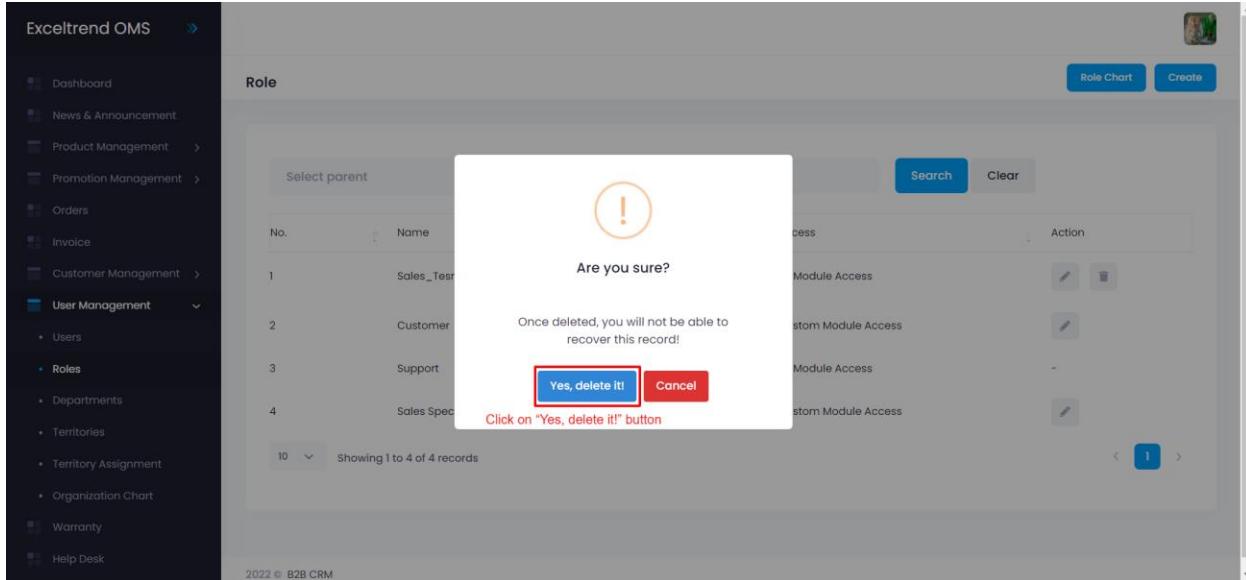
- Steps: - How to delete the role.

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



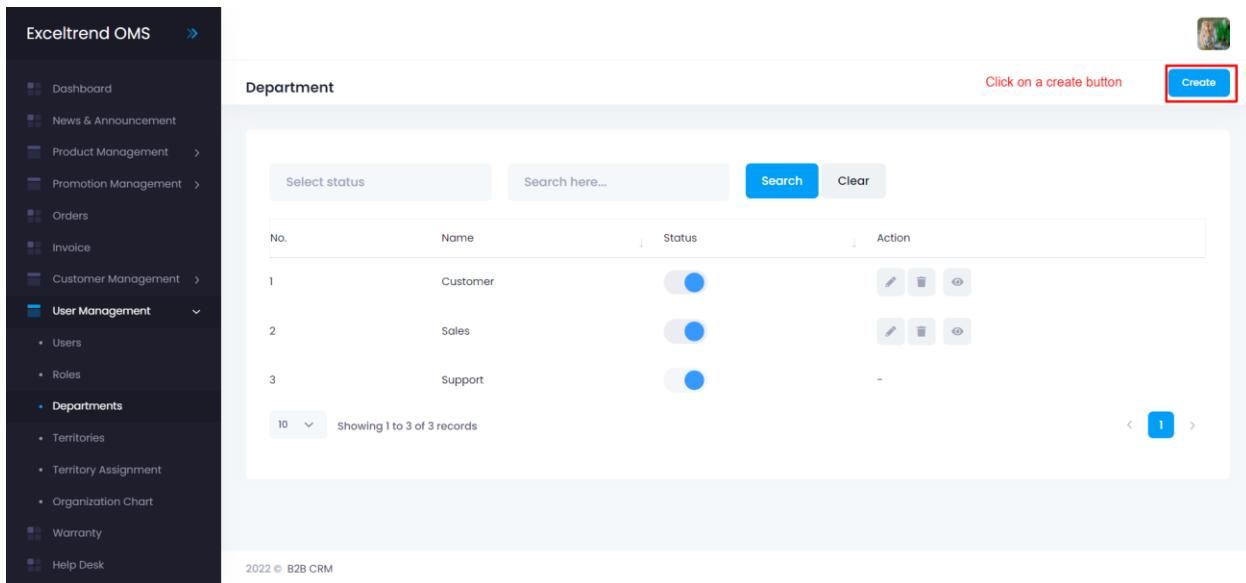
The screenshot shows the 'Role' management screen in the Exceltrend OMS. The sidebar and main interface are similar to the previous screenshot. In the main area, there is a table listing roles with columns for No., Name, Parent, Access, and Action. The 'Action' column contains edit and delete icons. The delete icon for the 'Customer' role is highlighted with a red box and a red arrow pointing to it from the text 'Click on trash icon'.

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



### 7.3. Departments

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



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

The screenshot shows the 'Department' section of the 'Add Details' form. On the left is a sidebar with various management options like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management (with sub-options like Users, Roles, Departments), Territories, Territory Assignment, Organization Chart, Warranty, and Help Desk. The 'User Management' section is currently selected. The main form has a header 'Department'. It contains a 'Department Name\*' input field with placeholder 'Enter department name', which is highlighted with a red box. Below it is a 'Roles' section with three options: Sales Specialist, Support, and Customer. To the right is a 'Save' button and a 'Add to Department ?' section containing three checkboxes for Sales Specialist, Support, and Customer, all of which are highlighted with red boxes.

- Steps 3: - Click on save button.

This screenshot is identical to the previous one, showing the 'Add Details' page for a new department. The 'Department Name\*' field and the 'Add to Department?' section are still highlighted with red boxes. However, the 'Save' button at the bottom of the form is now highlighted with a red box and has a red arrow pointing to it, indicating the next step.

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

The screenshot shows the 'Department' list page in the Exceltrend OMS system. The left sidebar has 'User Management' selected under 'Departments'. The main area shows a table with columns: No., Name, Status, and Action. The 'Action' column contains icons for edit, delete, and view. The 'Edit' icon for the first row ('Customer') is highlighted with a red box and labeled 'Click on pencil icon'.

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

- Steps 2: - Update the data.

The screenshot shows the 'Update Details' page for a department. The left sidebar has 'User Management' selected under 'Departments'. The main area has a form titled 'Update Details'. It shows 'Department Name\*' set to 'Customer'. In the 'Roles' section, 'Customer' is listed with its 'Add to Department?' checkbox checked. Other roles like 'Sales Specialist' and 'Support' have their checkboxes unchecked.

- Steps 3: - Click on update button.

Exceltrend OMS

**Department**

**Update Details**

Department Name\*  
Customer

Roles

Sales Specialist  
Support  
Customer

Add to Department ?

**Update** ← Click on update button

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

Exceltrend OMS

**Department**

No.	Name	Status	Action
1	Customer	<input checked="" type="checkbox"/>	<span style="color: blue;">eye</span> <span style="color: blue;">edit</span> <span style="color: blue;">delete</span>
2	Sales	<input checked="" type="checkbox"/>	<span style="color: blue;">edit</span> <span style="color: blue;">delete</span> <span style="color: blue;">eye</span>
3	Support	<input checked="" type="checkbox"/>	<span style="color: blue;">edit</span> <span style="color: blue;">delete</span>

Showing 1 to 3 of 3 records

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

Hierarchy View

```

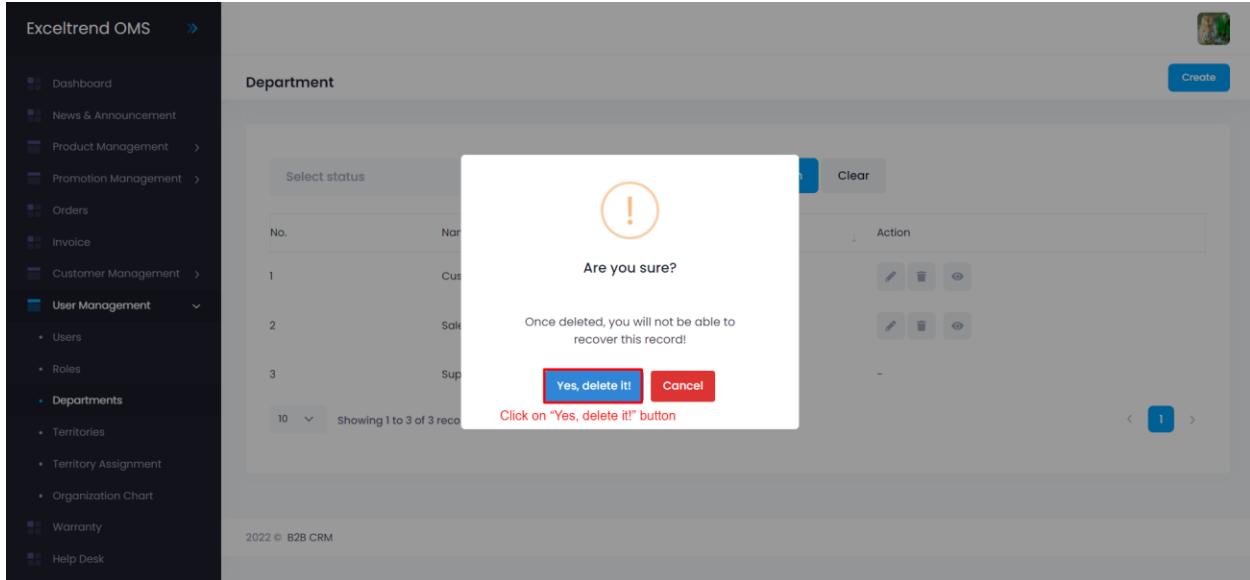
graph TD
    Department[Department  
Customer] --- Role[Role  
Customer]
  
```

- **Steps: - How to delete the department.**

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

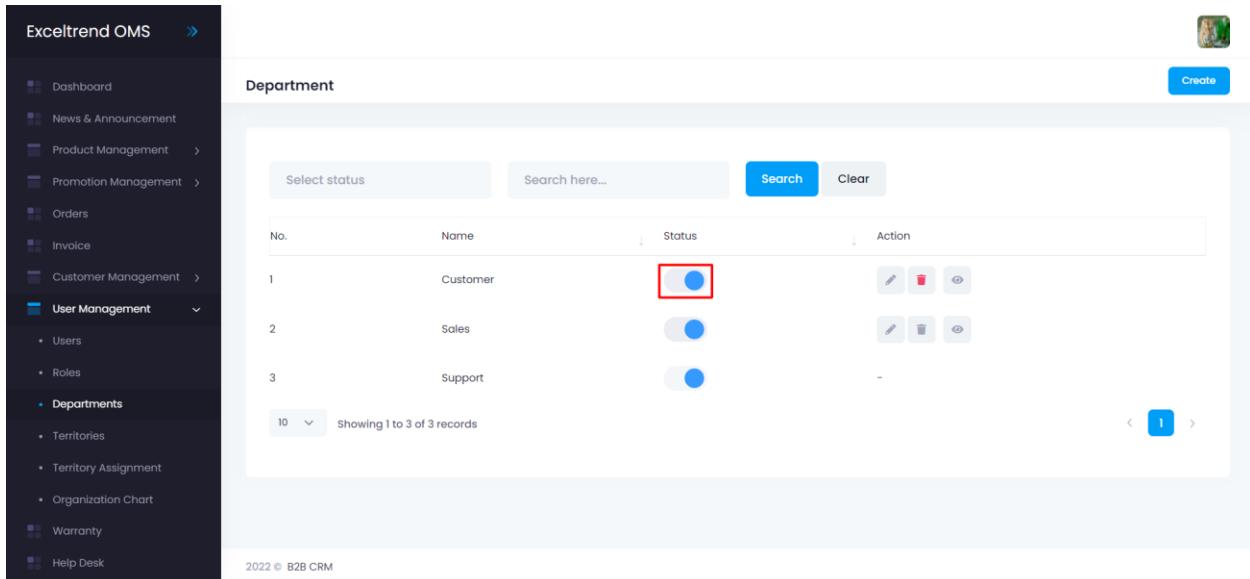
No.	Name	Status	Action
1	Customer	<input checked="" type="checkbox"/>	
2	Sales	<input checked="" type="checkbox"/>	
3	Support	<input checked="" type="checkbox"/>	

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

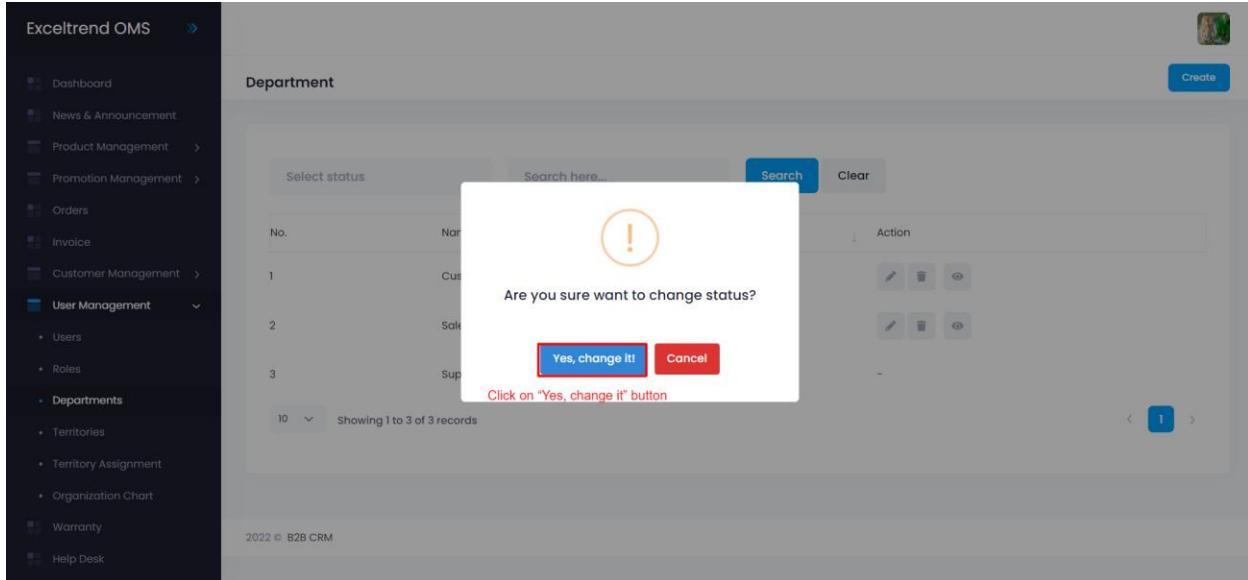


- **Steps: - How active and inactive the department.**

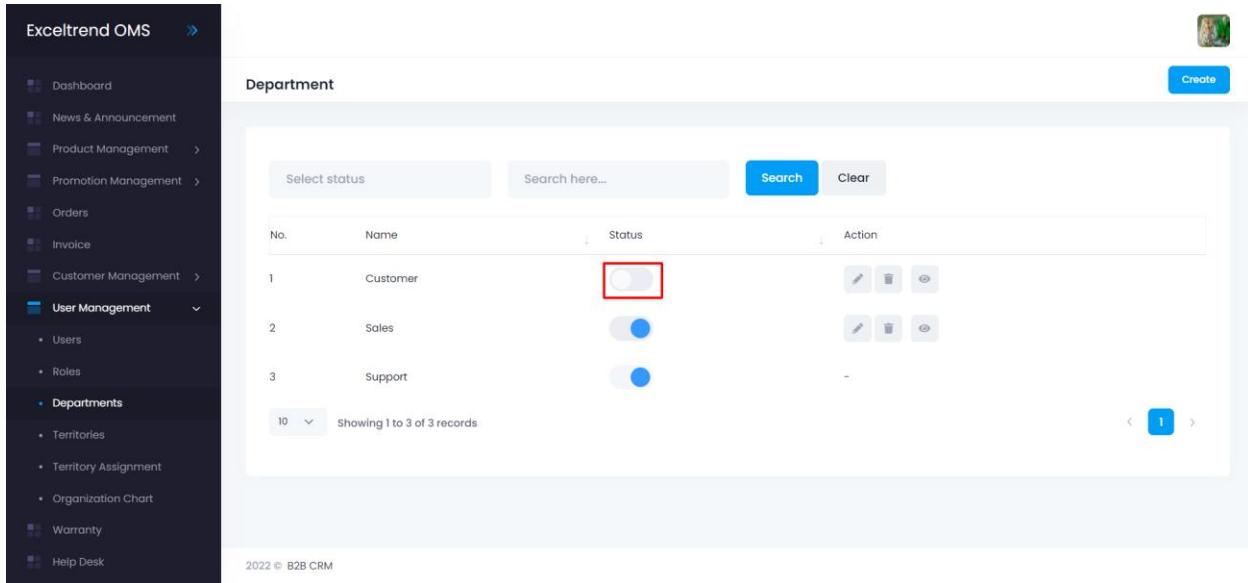
- Steps 1: - Click on Active status and appear to one pop-up model.



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



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



## 7.4. Territories

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

- Steps: - How sync the territories.

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

The screenshot shows the Exceltrend OMS Territories page. 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 'Territories' and displays a table with columns: No., Name, and Status. The status for all territories listed is 'Active'. A blue button labeled 'Sync Territories' is located in the top right corner of the main area. A red arrow points to this button with the text 'Click on sync territories'.

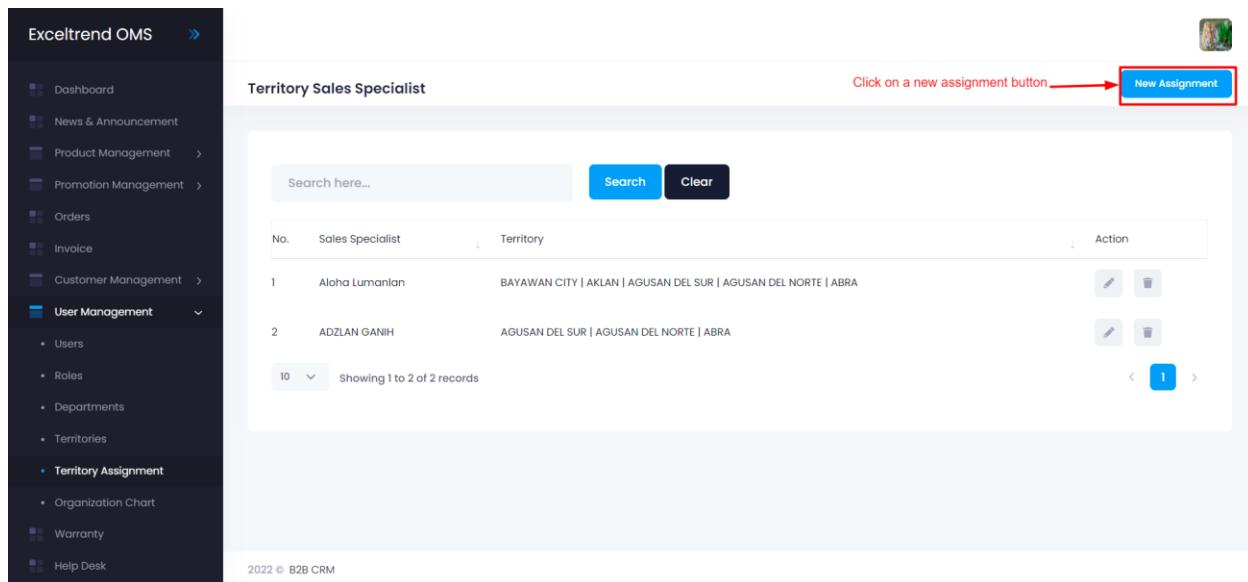
No.	Name	Status
1	ORIENTAL MINDORO	Active
2	KALINGA	Active
3	IFUGAO	Active
4	NUEVA VIZCAYA	Active
5	BAGUIO	Active
6	OOLONGAPO	Active
7	ILOILO PROVINCE	Active

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

The screenshot shows the same Territories page as above, but with a modal dialog box overlaid. The dialog has a warning icon and the text 'Are you sure want to sync Territories?'. Below this, there is a note: 'Syncing process will run in background and it may take some time to sync all Territories Data.' At the bottom of the dialog are two buttons: 'Yes, do it!' (highlighted with a red box) and 'Cancel'. A red arrow points to the 'Yes, do it!' button with the text 'Click on "Yes, do it" button'.

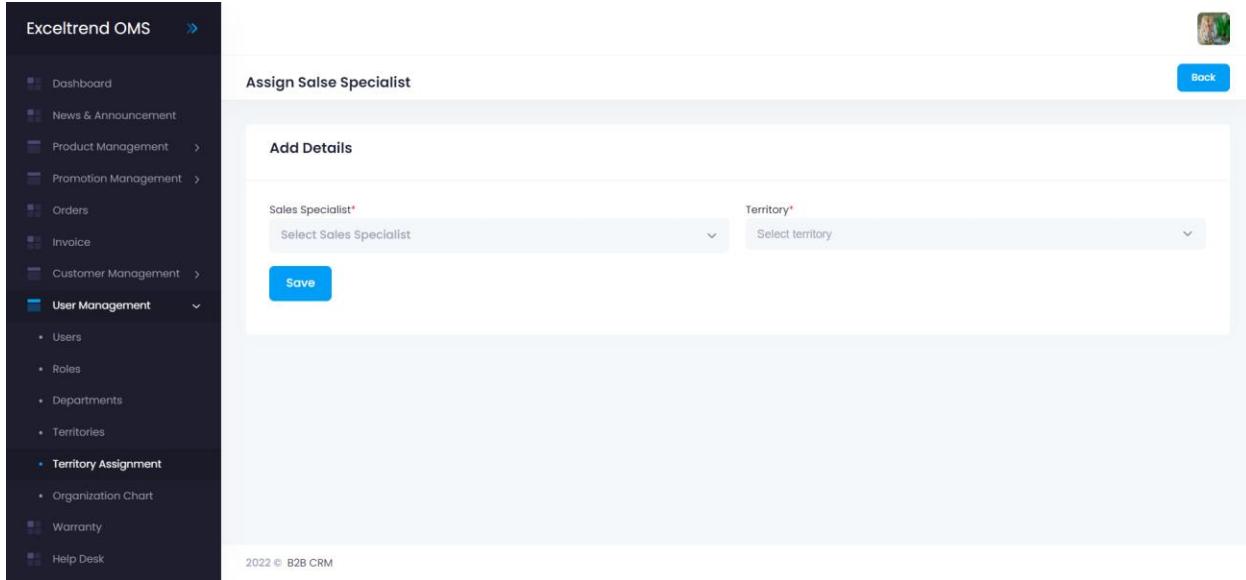
## 7.5. Territories Assignment: -

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

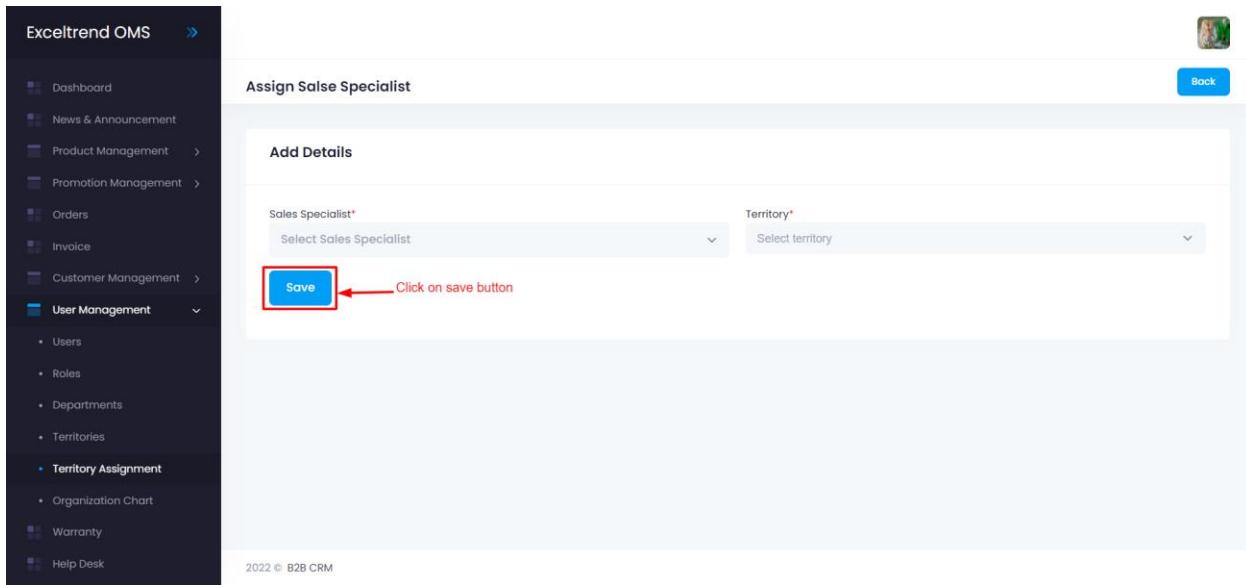


The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with various menu items. The main area is titled 'Territory Sales Specialist'. It features a search bar with 'Search' and 'Clear' buttons. Below the search is a table with columns 'No.', 'Sales Specialist', and 'Territory'. 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, it says 'Showing 1 to 2 of 2 records'. In the top right corner of the table header, there is a blue button labeled 'New Assignment' with a red arrow pointing to it from the text above. The bottom right corner of the screenshot has a blue footer bar.

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



- Steps 3: - Click on save button.



- Steps: - How to edit an assignment.
  - Steps 1: - Click on pencil icon.

The screenshot shows the 'Territory Sales Specialist' page. On the left is a dark sidebar with the 'User Management' section expanded, showing 'Territory Assignment' as the selected item. The main area has a header 'Territory Sales Specialist' with a search bar and a 'New Assignment' button. Below is a table with columns: No., Sales Specialist, Territory, and Action. Two records are listed:

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

At the bottom, it says 'Showing 1 to 2 of 2 records' and has navigation arrows. A red arrow points to the pencil icon in the 'Action' column for the first row.

- Steps 2: - Update the data.

The screenshot shows the 'Assign Sales Specialist' page. The sidebar is identical to the previous one. The main area has a header 'Assign Sales Specialist' with a 'Back' button. Below is a form titled 'Update Details' with fields: 'Sales Specialist\*' (Aloha Lumanian (Code: 452)) and 'Territory\*' (a multi-select dropdown containing 'BAYAWAN CITY', 'AKLAN', 'AGUSAN DEL SUR', 'AGUSAN DEL NORTE', and 'ABRA'). At the bottom is a blue 'Update' button. A red arrow points to this 'Update' button.

- Steps 3: - Click on update button.

Assign Sales Specialist

**Update Details**

Sales Specialist\*  
Aloha Lumanlan (Code: 452)

Territory\*  
BAYAWAN CITY | AKLAN | AGUSAN DEL SUR | AGUSAN DEL NORTE | ABRA

**Update** Click on update button

2022 © B2B CRM

- **Steps: - How to delete the assignment.**

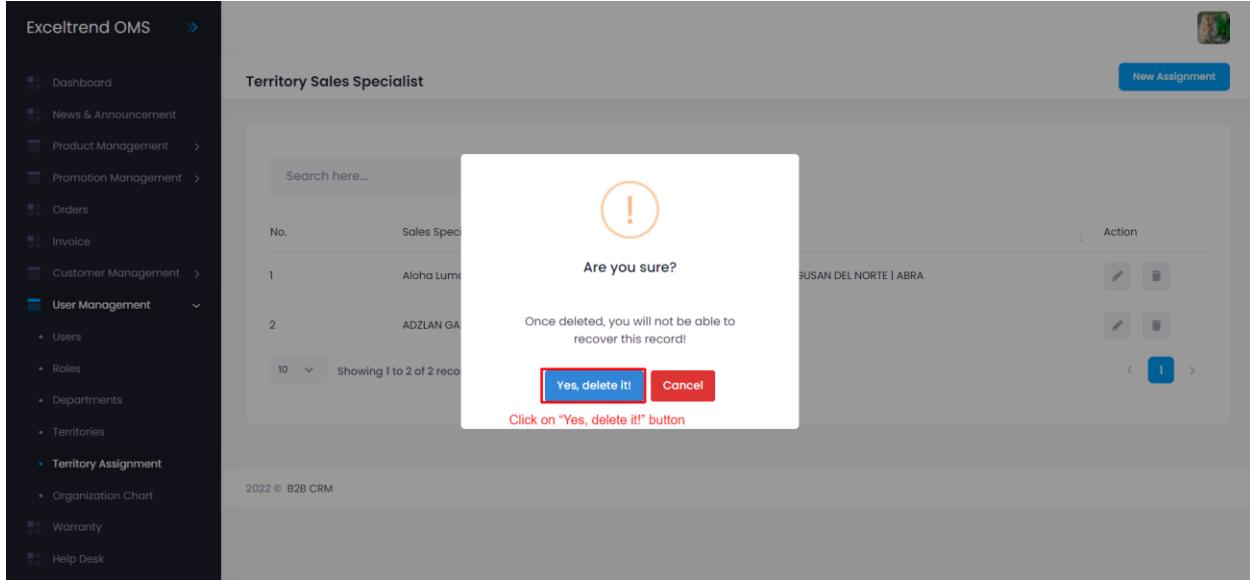
- **Steps 1: - Click on trash icon and appear pop-up model.**

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

Showing 1 to 2 of 2 records

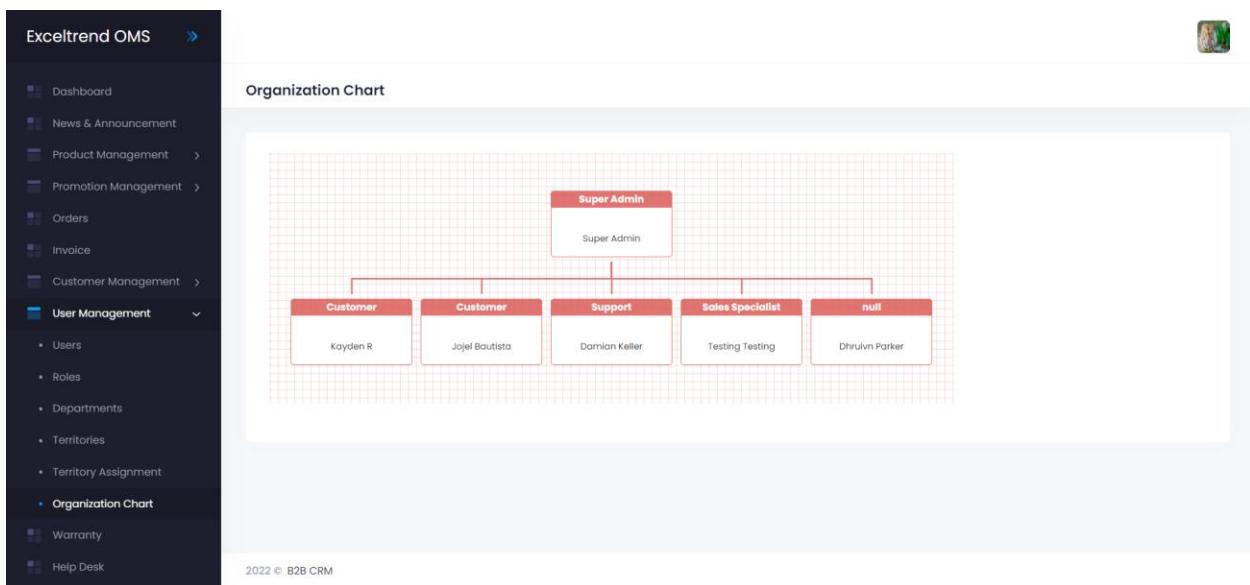
2022 © B2B CRM

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



## 7.6. Organization Chart: -

- Admin can view the hierarchy of role.



## 8. Warranty

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

The screenshot shows the Exceltrend OMS interface. On the left is a dark sidebar with various menu items: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty (which is selected and highlighted in blue), Help Desk, SAP API Connection, and Activity Log. The main area is titled 'Warranty' and contains a table of claims. The table has columns: No., Ref No., Business Unit, Customer Name, Claim Type, Dealer Name, Date Time, and Action. Two rows of data are visible. The 'Action' column for the second row contains icons for edit, delete, and view. A red box highlights the edit icon for the second claim, and a red arrow points to it with the text 'Click on edit icon'. At the bottom of the table, it says 'Showing 1 to 2 of 2 records'. The footer of the page includes the text '2022 © B2B CRM'.

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	ghjghj	Feb 11, 2022	

- Steps 2: - Update the data.

**Exceltrend OMS**

**Warranty**

**Update Details**

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

Customer Name\* PATACBIL, DARWIN

Customer Email\* eDSB2-2@mailinator.com Customer Phone\* 9714587544

Customer Location\* US Customer Telephone\* 9714587544

Customer Address\* US

Dealer's Name\* Ron Parker

Dealer's Location\* US Dealer's Telephone\* 8574201245

Dealer's Fax Enter dealer's fax

**Tire & Vehicle Info**

Vehicle Maker\* IIO Year\* 2020

Vehicle Model\* Sport License Plate\* XY25U412

Vehicle Mileage\* 10

**PC/LT Tire Position**

LF  RF  LR  RR

Tire Mileage Enter tire mileage

**2 Wheels/TB Tire Position**

Front  Drive  Trailer

Tire Mileage Enter tire mileage

Tire Serial No. Enter tire serial no.

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:

- crease 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
- ridge 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"> <li>• Deflation or loss of bond between tread plies &amp; rubber element caused by excessive stresses and heat build up.</li> <li>• Condition of the tread plies.</li> <li>• Improper tread cuts or punctures.</li> <li>• Faulty repair.</li> </ul>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Pictures of the Tire focusing on Damage Areas**

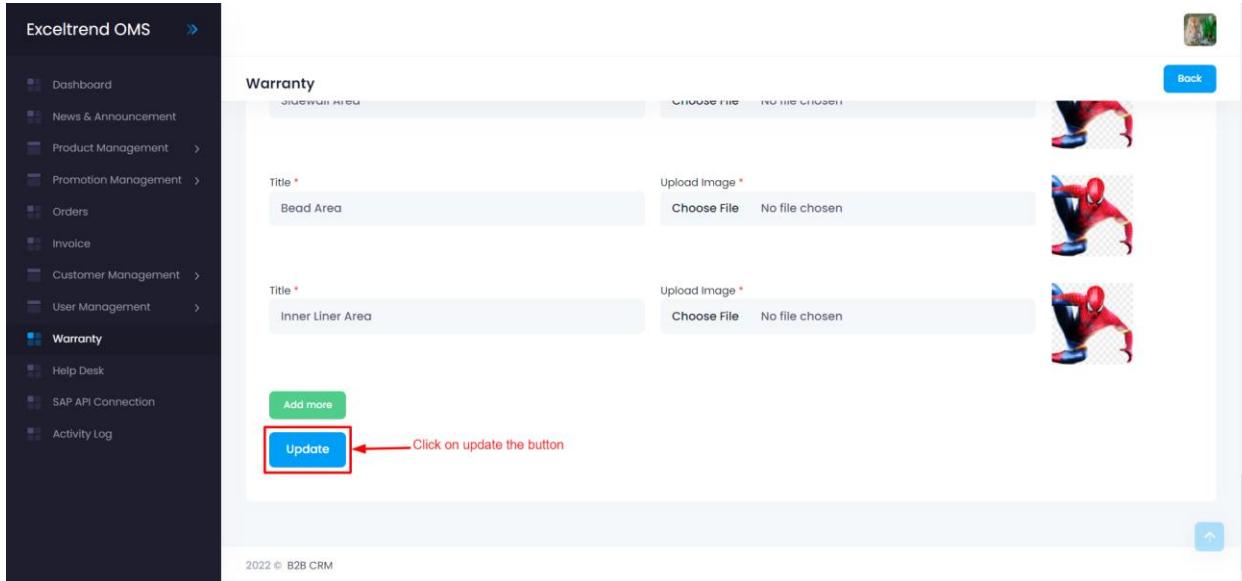
Title*	Upload image*	Choose File	No file chosen	
Tread Area	Upload image*	Choose File	No file chosen	
Sidewall Area	Upload image*	Choose File	No file chosen	
Bead Area	Upload image*	Choose File	No file chosen	
Inner Liner Area	Upload image*	Choose File	No file chosen	

**Actions**

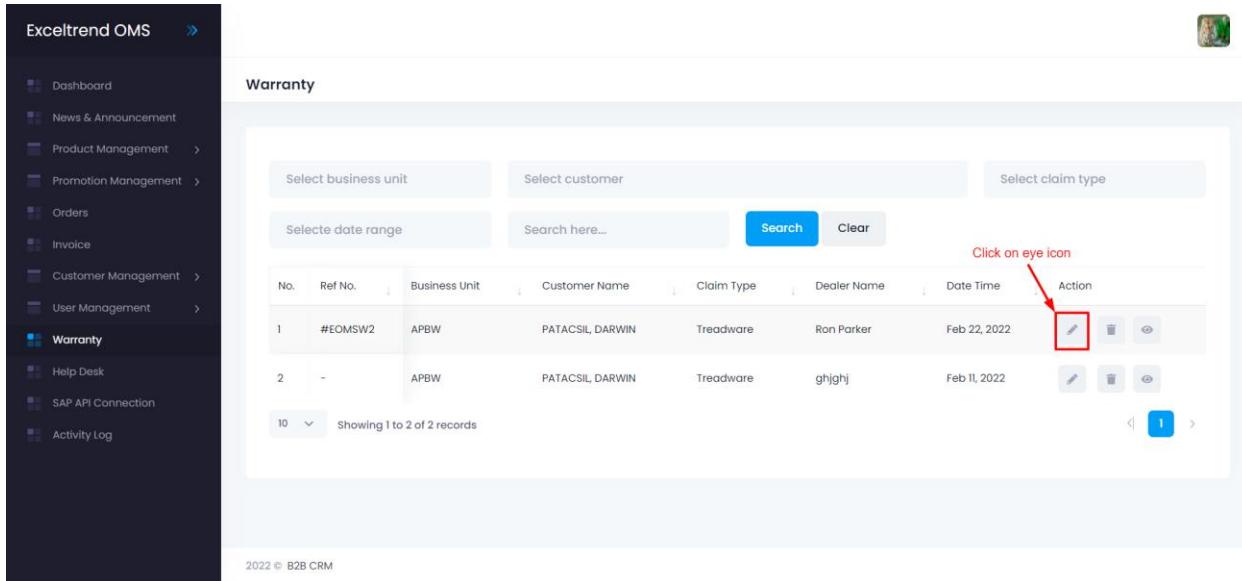
Add more Update

2022 © B2B CRM

- Steps 3: - Click on update the button.



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



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

**Exceltron OMS**

**Warranty**

**View Details**

**Data Type:** 40055, 20002  
**Type of Warranty Status:** Concession  
**Ref No.:** 4E0055W2

**Business Unit:** APNW  
**Customer Name:** PATAC SIL DARWIN  
**Customer Email:** 405552\_2@mailinator.com  
**Customer Phone:** 9714507544  
**Customer Location:** US  
**Customer Telephone:** 9714507544  
**Customer Address:** US  
**Dealer Name:** Max Dealer  
**Dealer Location:** US  
**Dealer Telephone:** 9714507544  
**Dealer Fax:** -

**Tire & Vehicle Info**

**Vehicle Make:** BD  
**Vehicle Model:** SPORT  
**Vehicle Mileage:** 10  
**Year:** 2020  
**License Plate:** XY20DU419  
**P/C/LT Tire Position:** LR, RR, LC, RC  
**P/C/LT Tire Mileage:** -  
**P/C/LT Tire Serial No.:**  
**2 Wheels/TD Tire Position:** FRONT, DRIVE, TRAILER  
**2 Wheels/TD Tire Mileage:**  
**2 Wheels/TD Tire Serial No.:**  
**Reason for the return:** Quality Not Good  
**Location of damage:** Tread, sidewall

**Claim Points**

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

Shoulder  No  
Center  Yes  
On-Sided  No  
Irregular  Yes

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

generated  No  
Not generated  Yes

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

- Hot Process  No  
- Cold Process  Yes

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

Tread  Yes  
Shoulder  Yes  
Sidewall  Yes  
- Round  Yes

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

- cracks on the bead area (circumferential or not)  Yes
- deformation on the bead (misalignment or any sign of improper bead seating)  No
- evidence of bead heating and bead rubber brittleness  Yes
- sign of mounting / demounting damage on bead  Yes
- bulge or separation on the bead area  No
- narrow rim (check measure bead to bead clearance) - It should be within standard rim as indicated on the sidewall/tire.  No
- traces of chemicals or oil used during tire mounting  Yes

**6. inner liner manifestations:**

- sign of ozone or stress cracks  Yes
- improper repair or repair failures  Yes
- inner liner cracks near the bead area of the damage  No
- any sign of running the tire in underinflated condition  Yes

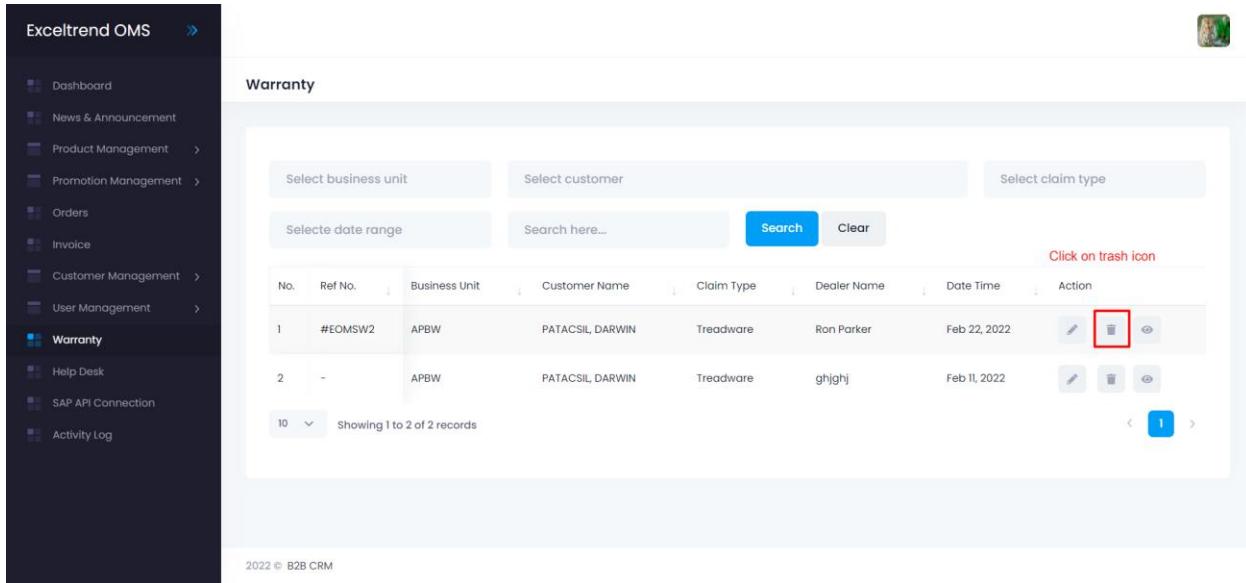
**Tire Manifestation Probable Cause**

No.	Image	Description	Probable Cause(s)	Answer
1.		+ Deformation or bulging of the tread area.	<ul style="list-style-type: none"> <li>- Deformations or loss of bond between tread plies &amp; rubber</li> <li>- Misalignment of top or side plies</li> <li>- Evidence of the road plies</li> <li>- Evidence of bead rub or puncture</li> <li>- Faulty repair</li> </ul>	No

**Pictures of the Tire focusing on Damage Areas**

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

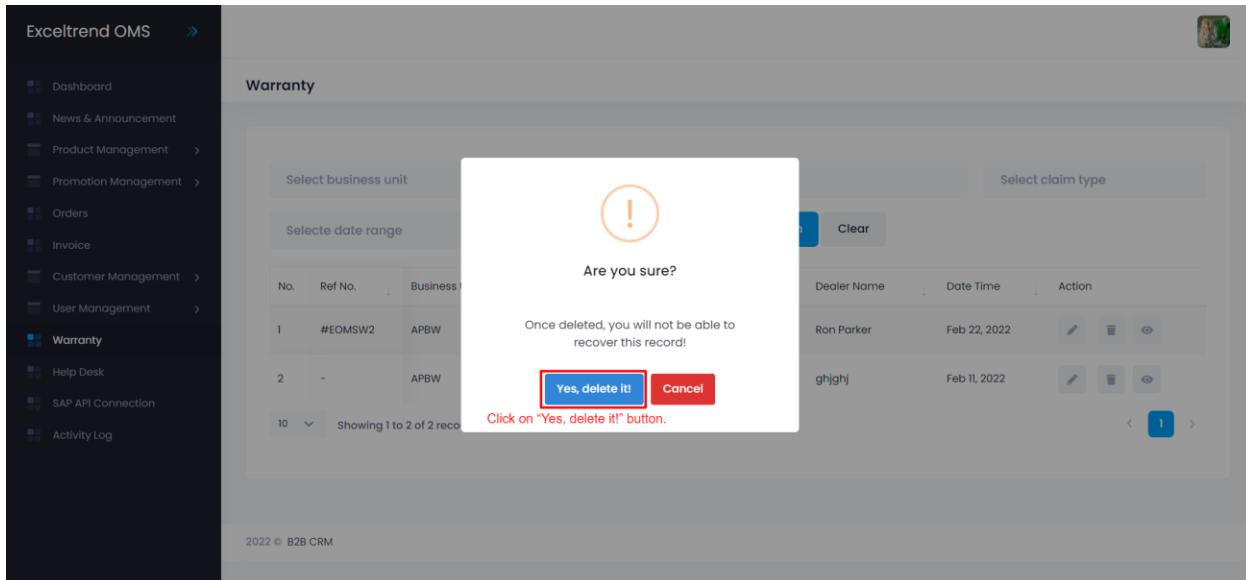
- Steps: - How to delete the warranty.
- Steps 1: - Click on trash icon and appear pop-up model.



The screenshot shows the 'Warranty' section of the Exceltrend OMS. On the left is a sidebar with various management options. The main area displays a table of warranty claims. The first claim in the list has its trash icon highlighted with a red box. The table columns include No., Ref No., Business Unit, Customer Name, Claim Type, Dealer Name, Date Time, and Action.

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



The screenshot shows the same 'Warranty' page after a deletion attempt. A modal dialog box is centered over the table, asking 'Are you sure?'. It also states 'Once deleted, you will not be able to recover this record!'. At the bottom of the dialog, the 'Yes, delete it!' button is highlighted with a red box. The background table shows the remaining claim.

## **9. Help Desk: -**

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

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

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

- Steps 1: - Click on eye icon.

The screenshot shows the Exceltrend OMS Help Desk listing page. The left sidebar contains navigation links for Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk (which is selected), SAP API Connection, and Activity Log. The main area is titled 'Help Desk' and includes search and filter options: 'Select a status', 'Search here...', and 'Select date range'. Below these are 'Search' and 'Clear' buttons. The table lists six tickets with the following details:

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

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

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

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

Images:



2022 © B2B CRM

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

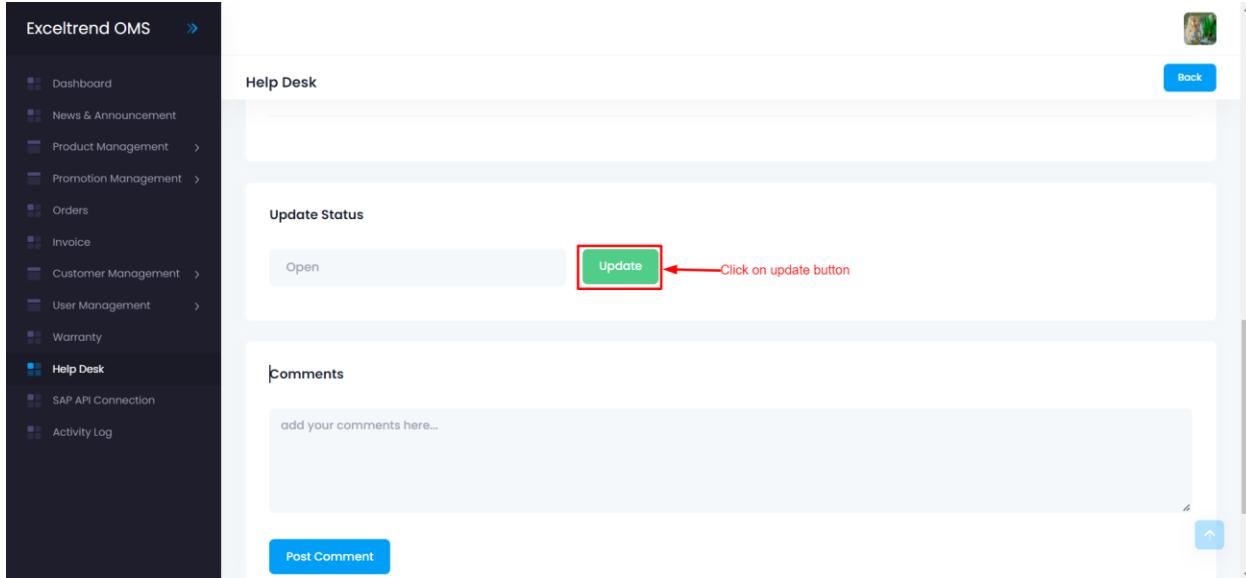
The screenshot shows the Exceltrend OMS Help Desk interface. On the left is a dark sidebar with various management options like Dashboard, News & Announcement, Product Management, etc. The main area is titled 'Help Desk' and contains a table of tickets. The columns include No., Ticket No., User Name,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

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

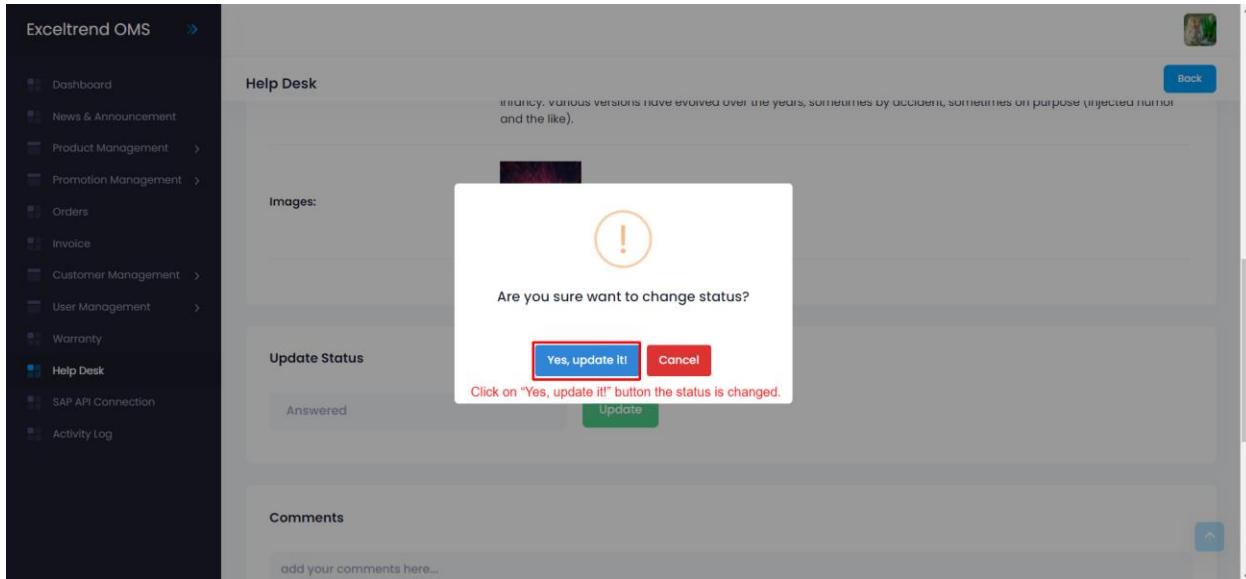
- Steps 2: - Select the status.

The screenshot shows the 'Update Status' dialog box from the Exceltrend OMS Help Desk. It has a dropdown menu with four options: Open, In Progress, Answered, and Closed. The 'Open' option is highlighted with a red box. To the right of the dropdown, there is a note 'Select the status.' and a 'Post Comment' button at the bottom.

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



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



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

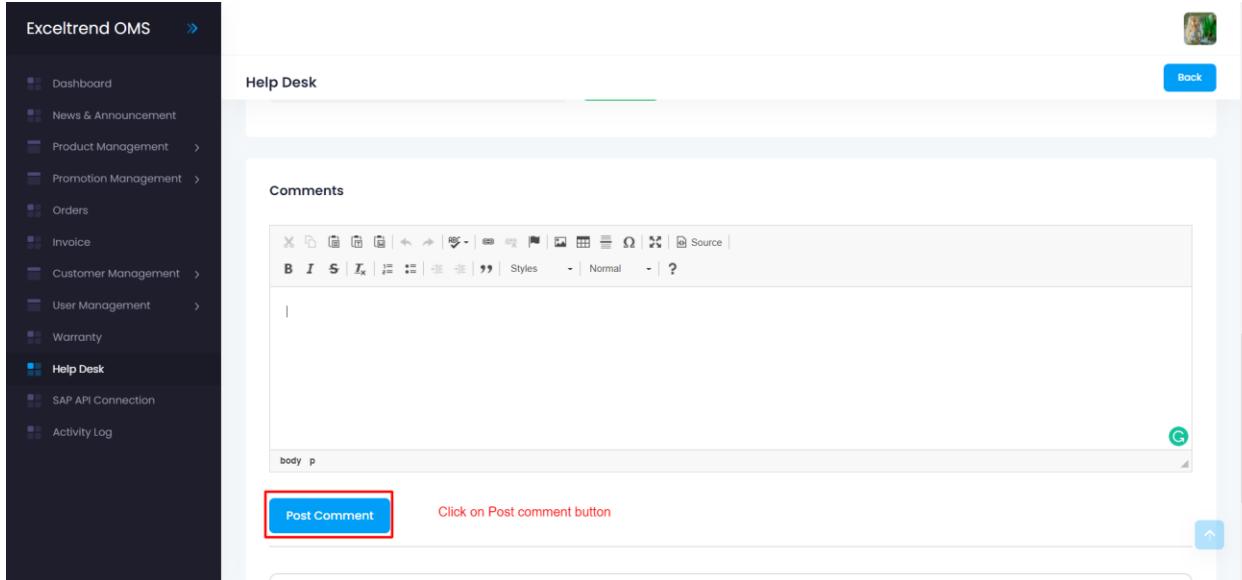
The screenshot shows a list of tickets in the Help Desk module. The columns include No., Ticket No., User Name, Type of Customer Request, Subject, Date, Status, Urgency, and Action. The 'Action' column contains an eye icon with a red border, which is the target of a red arrow. The first ticket is highlighted with a red box.

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

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

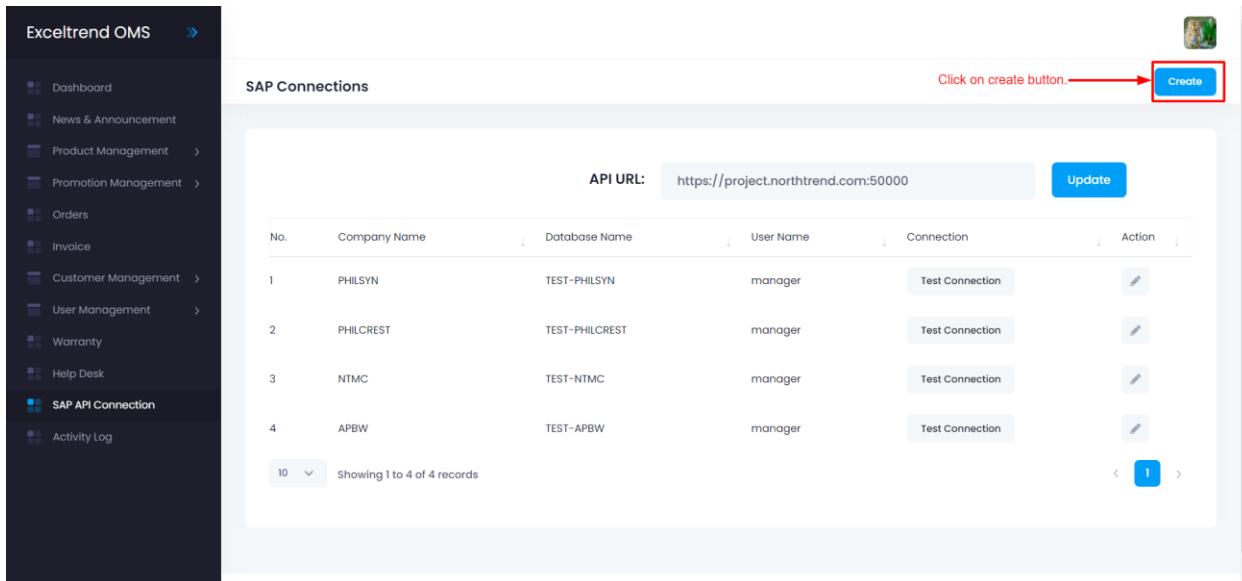
The screenshot shows the 'Comments' section of a ticket detail page. It features a rich text editor toolbar and a message input field with placeholder text 'Enter the message over here.' Below the input field is a code editor showing 'body p'. At the bottom is a 'Post Comment' button.

- 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>
- **Steps: - How to create an SAP API Connection.**
  - Steps 1: - Click on create button.



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

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

- Steps 3: - Click on save button

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

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

The screenshot shows the SAP Connections page within the Exceltrend OMS system. The left sidebar includes links for Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection (which is selected), and Activity Log. The main 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>

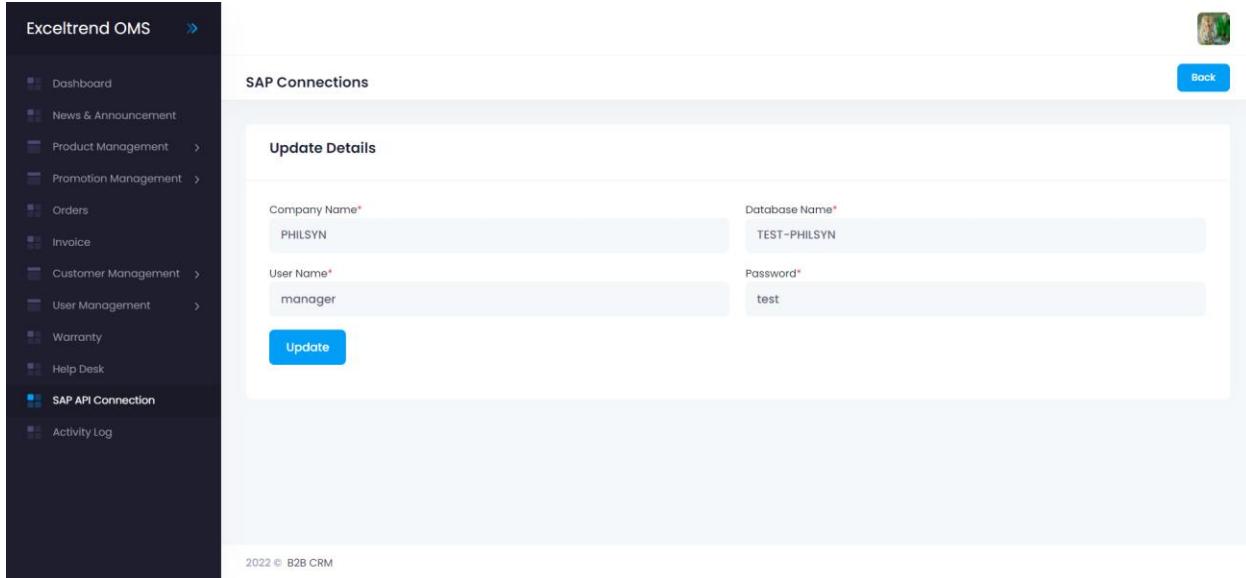
At the bottom, it says "Showing 1 to 4 of 4 records". A blue "Update" button is located at the top right of the table area.

- Steps: - How to edit the SAP API

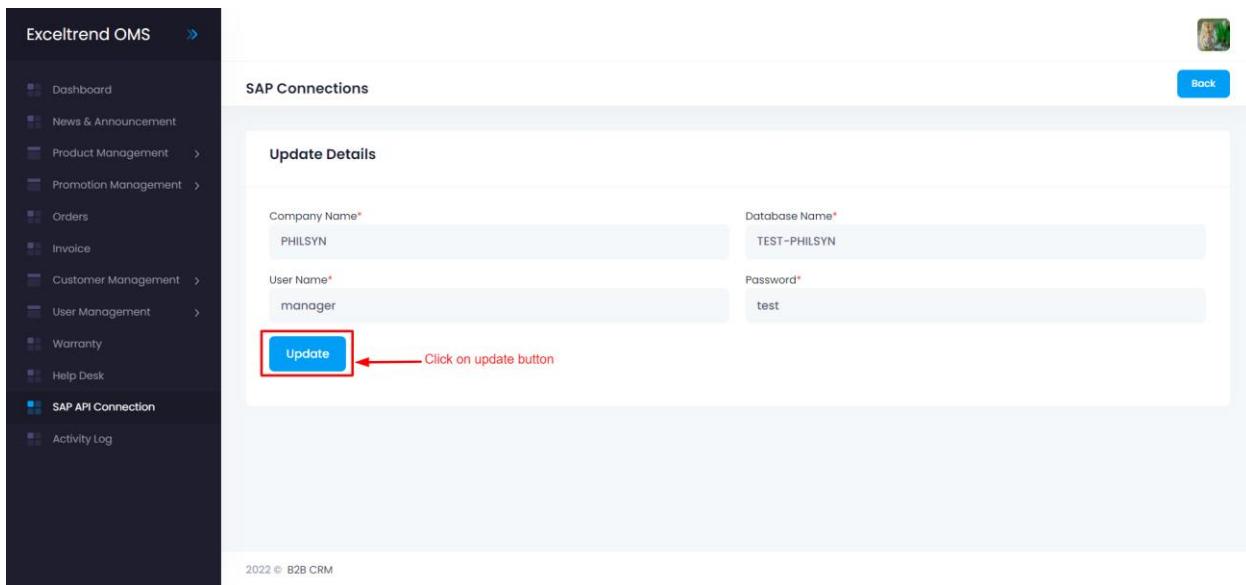
- Steps 1: - Click on pencil icon.

This screenshot is identical to the one above, showing the SAP Connections page. However, 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 remain the same.

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



- Steps 3: - Click on update button.



## 11. Activity Log

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

## 12. Report

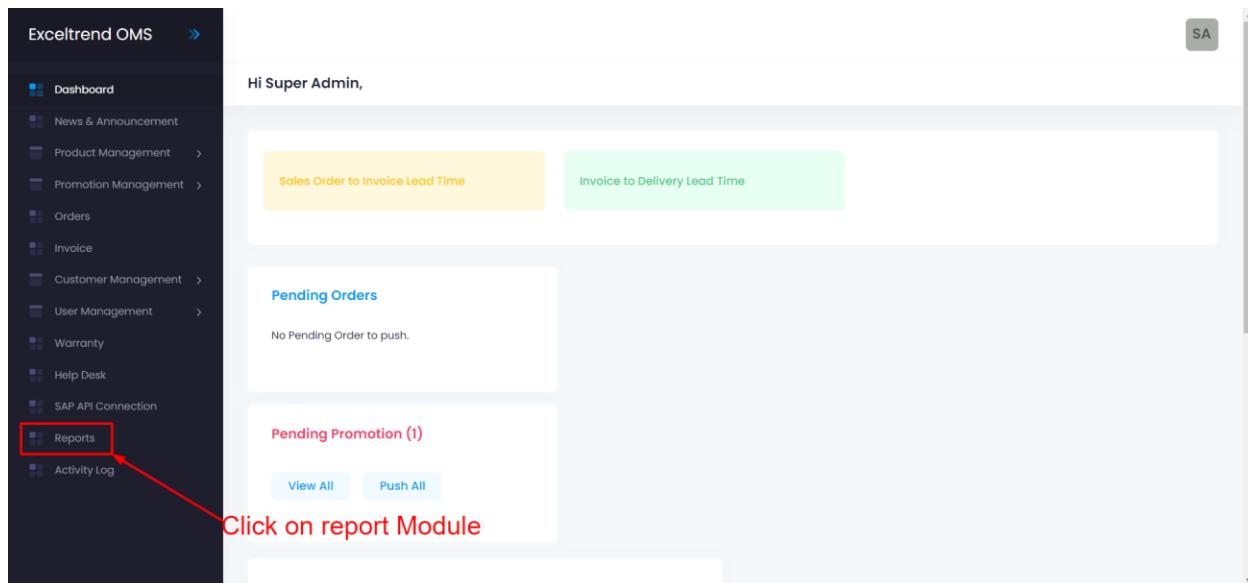
- Admin can see the all type of report in this module.
- Report module inside different type report show.
- Admin can show the all report in particular report page.

### 12.1 Promotions Report: -

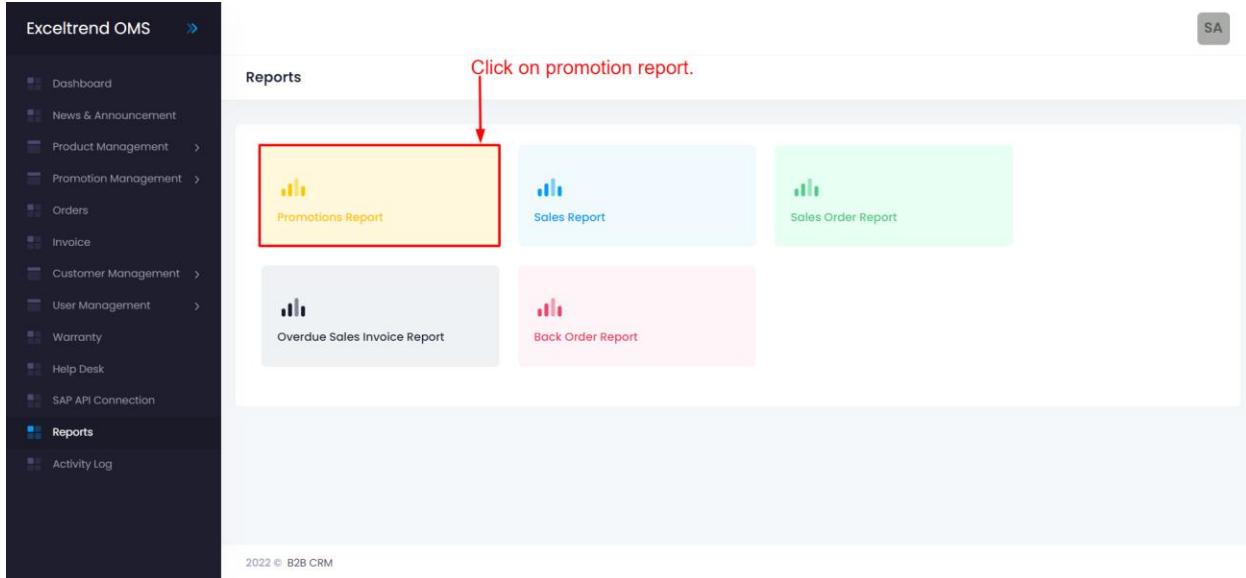
- Admin can see the promotion report in particular report page.
- Admin can see the all promotion details in this report.
- Admin can use the different-different filter and filter the data.
- Video Link: - <https://www.screencast.com/t/Y3ASTHAaP9C>

#### ○ Steps: - How to see the promotions report.

- Steps 1: - Click on Report module.



- Steps 2: - Click on promotions report.



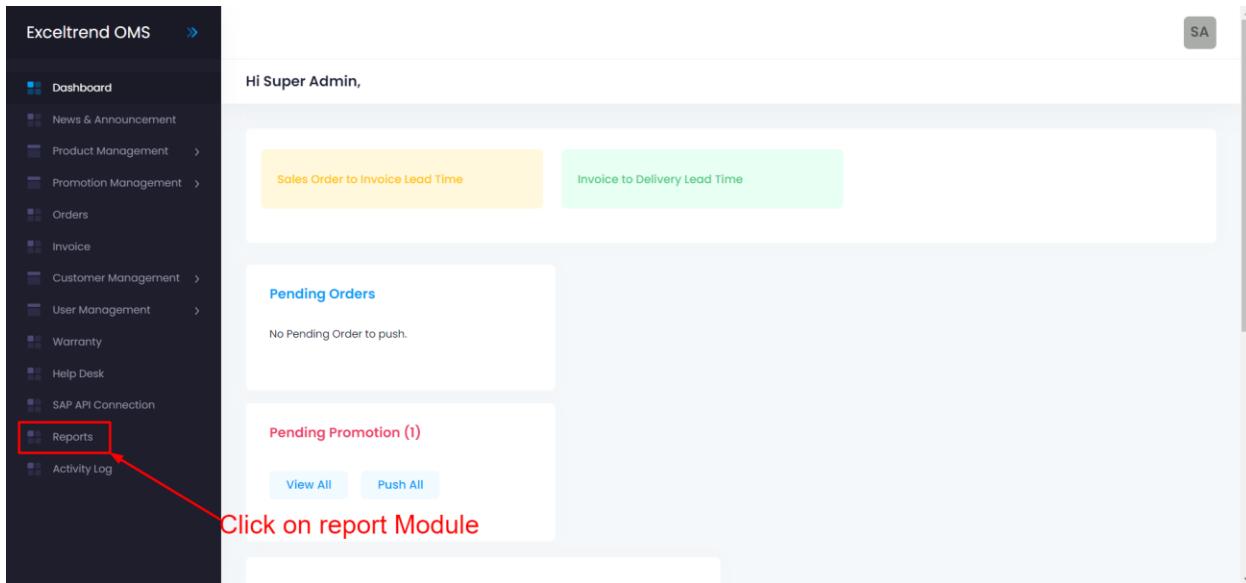
- Steps 3: - Show the all-promotion related data in listing page.

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

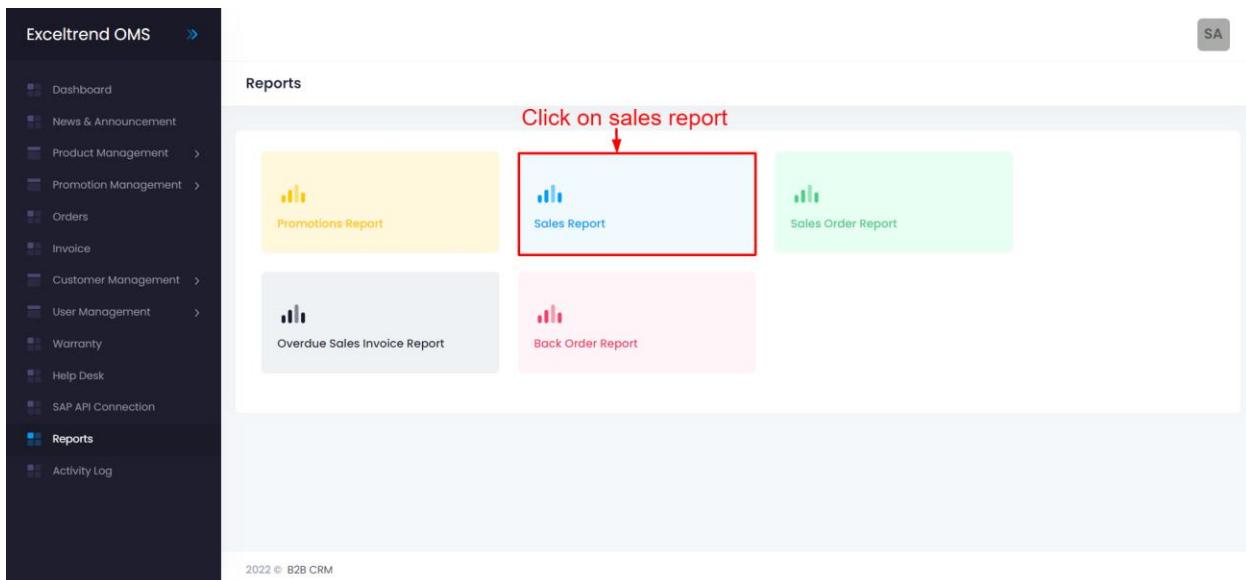
Showing 1 to 8 of 8 records

## 12.2 Sales Report: -

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



- Steps 2: - Click on sales report.

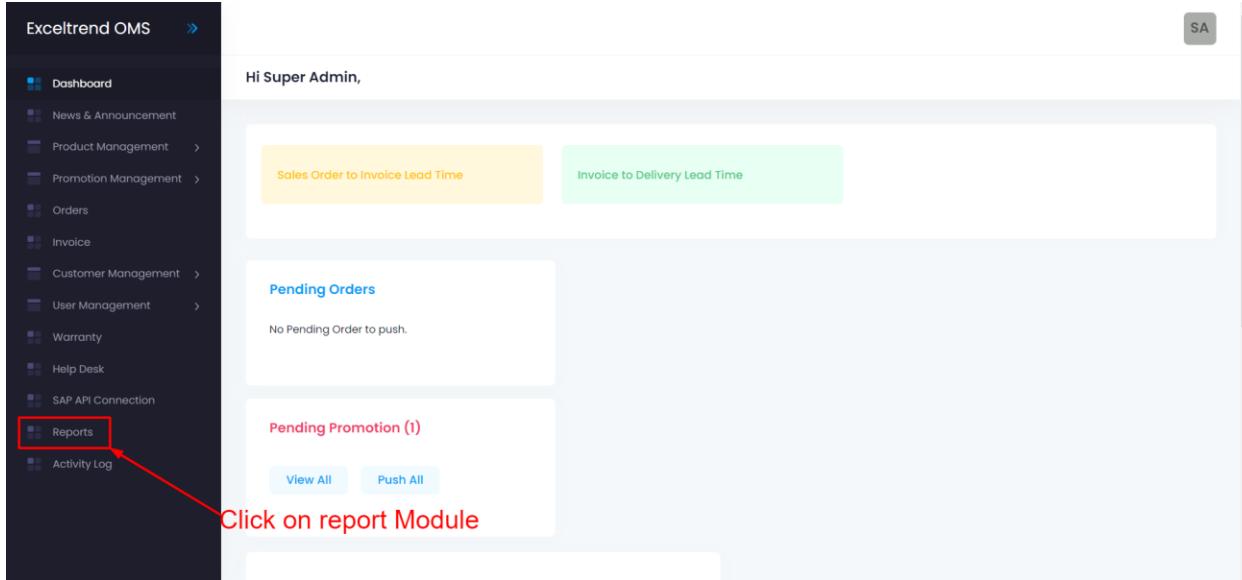


- Steps 3: - Show the all-sales related data in listing page.

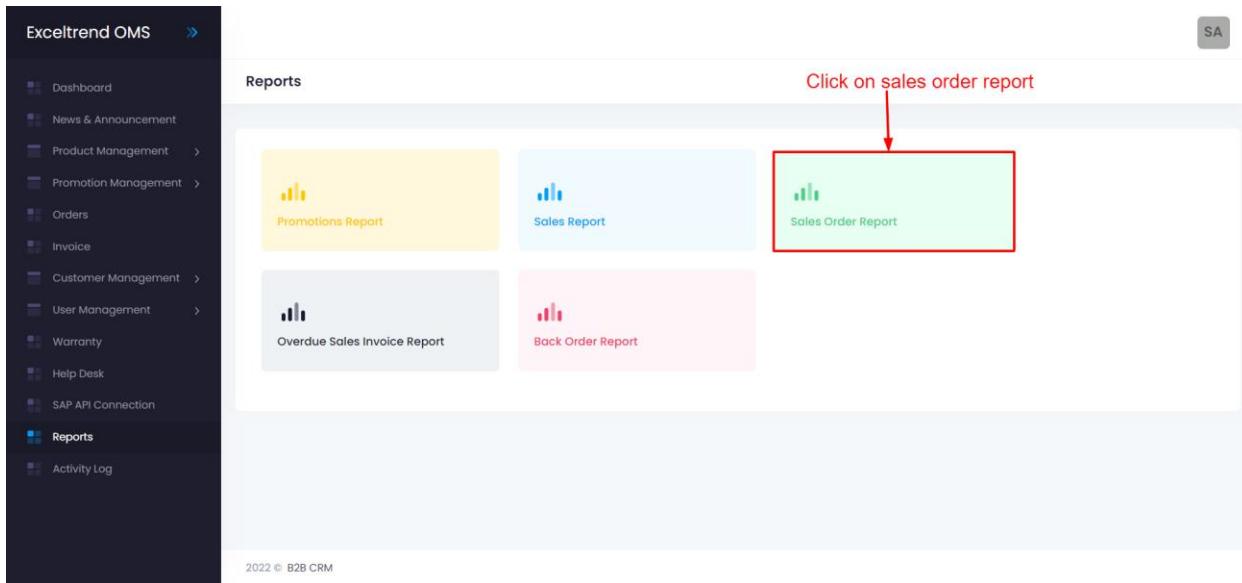
The screenshot shows the 'Sales Report' section of the Exceltrend OMS system. The interface includes a sidebar with various modules like Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, Reports, and Activity Log. The main area is titled 'Sales Report' and features a search bar with fields for 'Select business unit', 'Select date range', and 'Search here...', along with 'Search' and 'Clear' buttons. Below the search bar is a table with 257 records. The columns are: No., Product Code, Product Name, Brand, Business Unit, Total Quantity, Total Price, and Total Price After VAT. The table shows items such as BIRLA I0.00-20 18PR BISON, PRESA 205/45 ZR17 PS55 TL, MAXXIS-MCT MCT 80/80 - 14 M6029W 37P TL, etc. At the bottom of the table, it says 'Showing 1 to 100 of 257 records' and has navigation buttons for pages 1, 2, and 3.

### 12.3 Sales Order Report: -

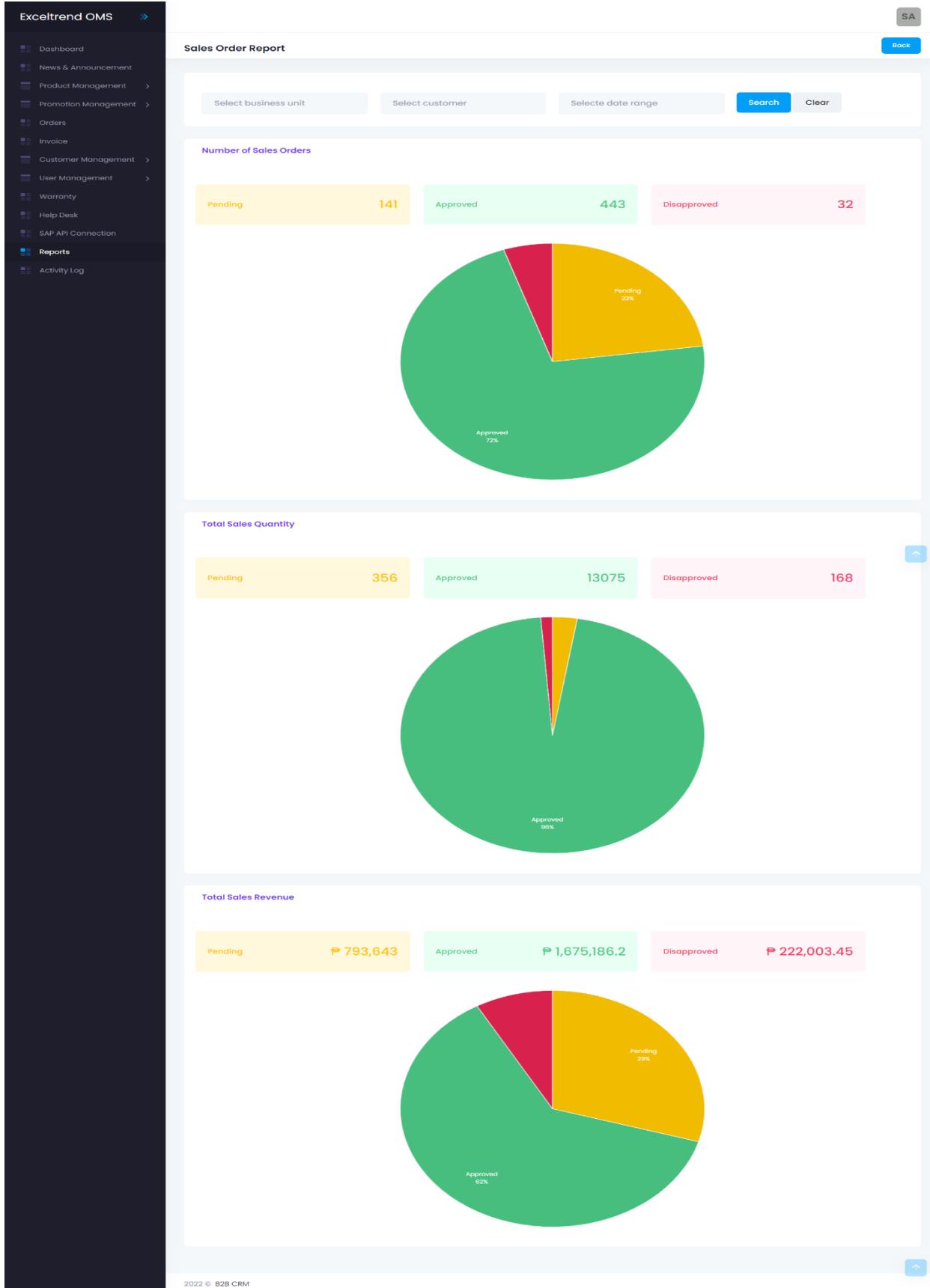
- Admin can see the sales order report in particular report page.
- Admin can see the all sales details in this report.
- Admin can use the different-different filter and filter the data.
- Video Link: - <https://www.screencast.com/t/TVu5gV8y>
- Steps: - How to see the sales order report.
  - Steps 1: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



- Steps 2: - Click on sales order report.

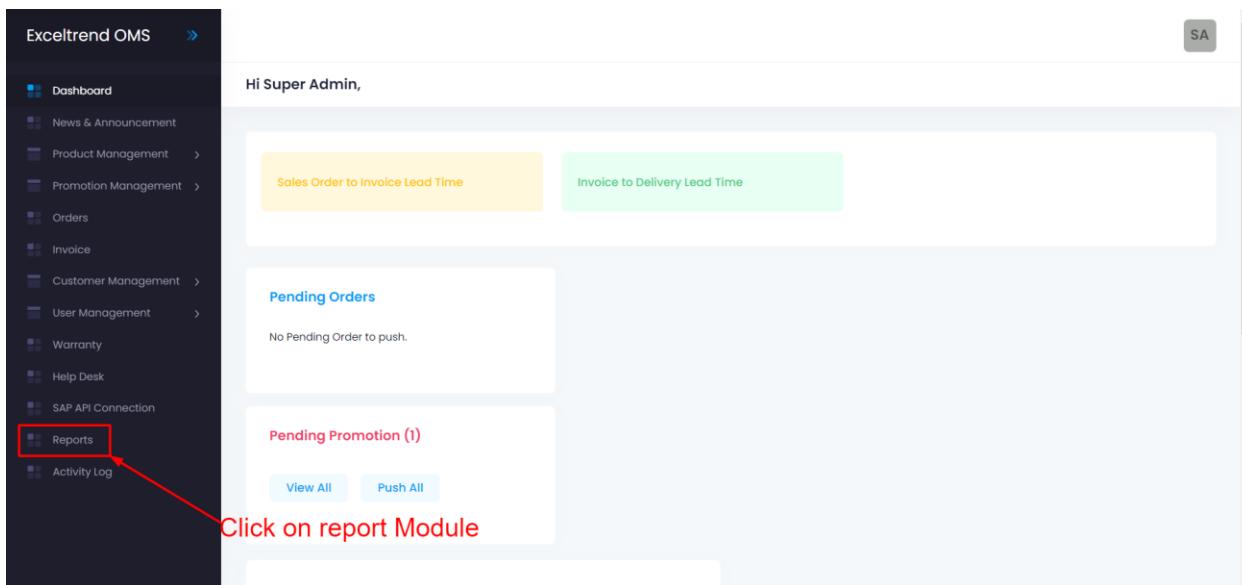


- Steps 3: - Show the all-sales order related data in listing page.

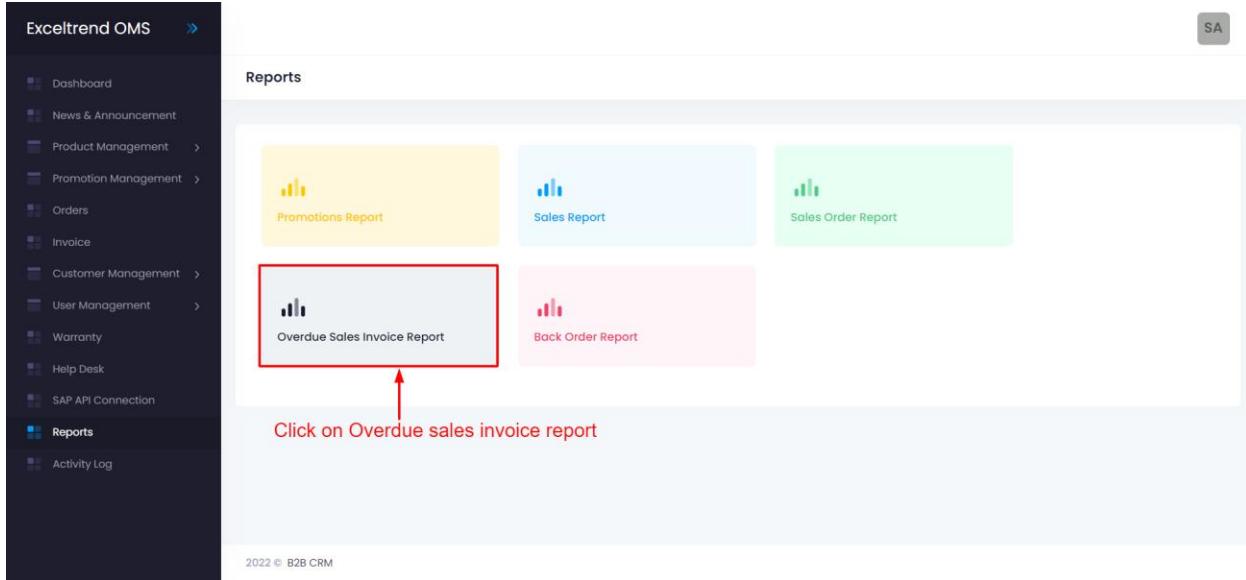


## 12.4 Overdue Sales invoice Report: -

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



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



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

**Overdue Sales Invoice Report**

Number of Overdue Invoices: 1789

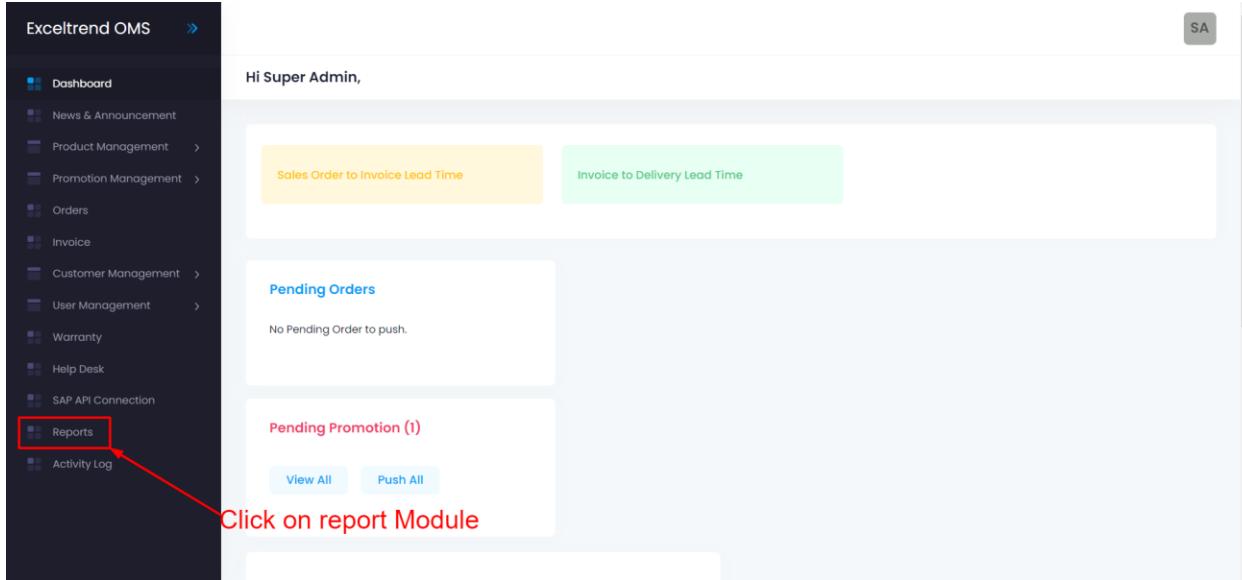
Total Amount of Overdue Invoices: ₱ 233,487,916.96

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>
  - Steps: - How to see the back order report.
    - Steps 1: - Click on Report module



- Steps 2: - Click on back order report.



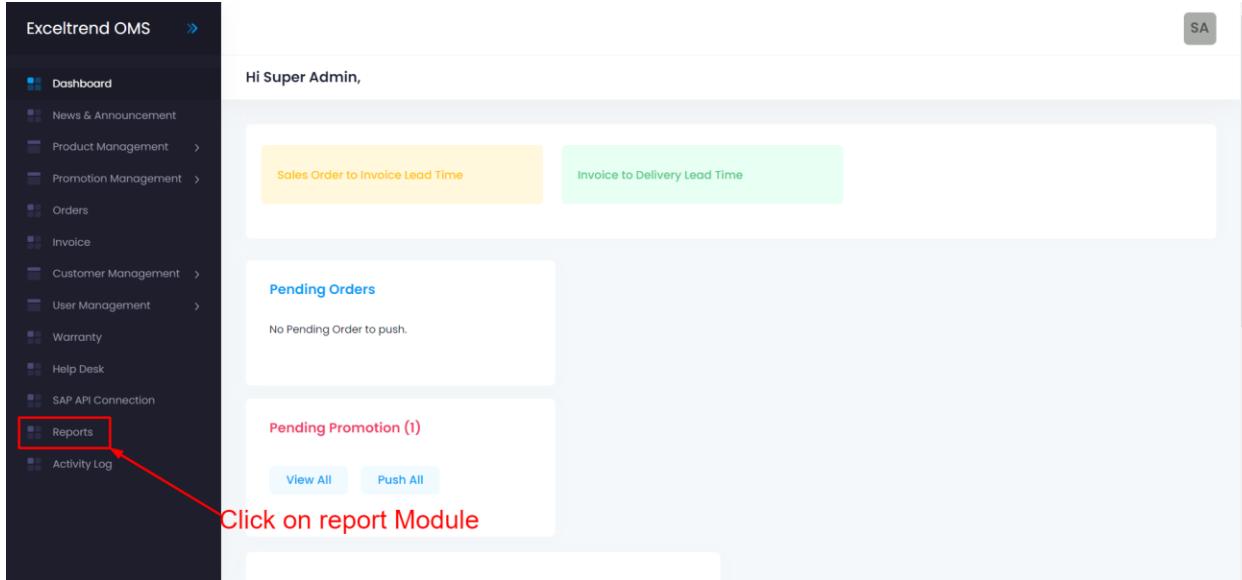
- Steps 3: - Show the all back order related data in listing page.

No.	Product Code	Product Name	Brand	Business Unit	Total Quantity	Total Price	Total Price After VAT
1	MXI2006	MXS 145 R12C MCV5 8PR TL 85/84N ESR MAXXIS	MAXXIS	APBW	3	₱ 0.00	₱ 0.00
2	CMI7080	CST MCT 70/80-17 TL CM619 35P	CST-MCT	APBW	2	₱ 1,135.70	₱ 1,135.70
3	PR22008	PRESA 10.00 R20 16PR PL909 SET	PRESA	APBW	2	₱ 29,552.50	₱ 29,552.50
4	MXI7073	MXS 265/70 R17 116T AT81I	MAXXIS	APBW	14	₱ 7,981.04	₱ 8,938.30
5	MXI7052	MXS LT285/70 R17 10PR MT772 TL	MAXXIS	APBW	2	₱ 0.00	₱ 0.00
6	MXI8025	MXS LT275/65 R18 10PR MT772 TL	MAXXIS	APBW	1	₱ 0.00	₱ 0.00
7	CSI3007	CST 175/70 R13 MR61 TL	CST	APBW	10	₱ 1,543.81	₱ 1,729.00
8	CSI4006	CST 185/65 R14 CS889 TL	CST	APBW	10	₱ 1,696.25	₱ 1,899.80
9	CSI6027	CST 195/55 R16 MD-A1 TL 91V	CST	APBW	10	₱ 2,303.75	₱ 2,580.20
10	CSI6036	CST 245/70 R16 AT2 TL	CST	APBW	10	₱ 4,211.90	₱ 4,717.30

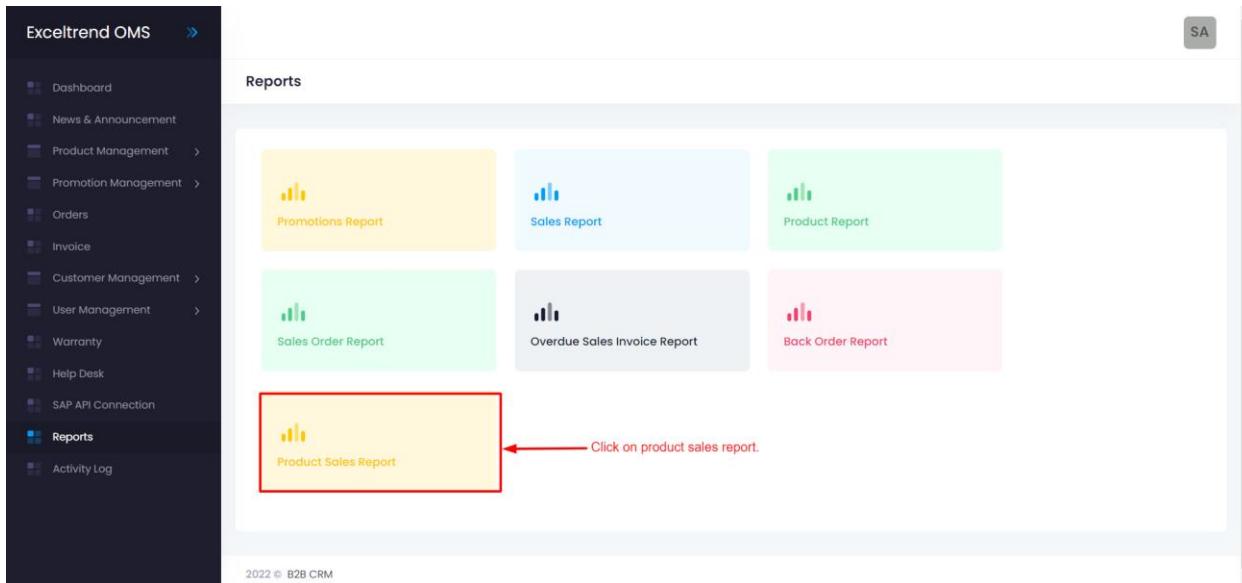
Showing 1 to 10 of 330 records

## 12.6 Product Sales Report: -

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



- Steps 2: - Click on product sales report.



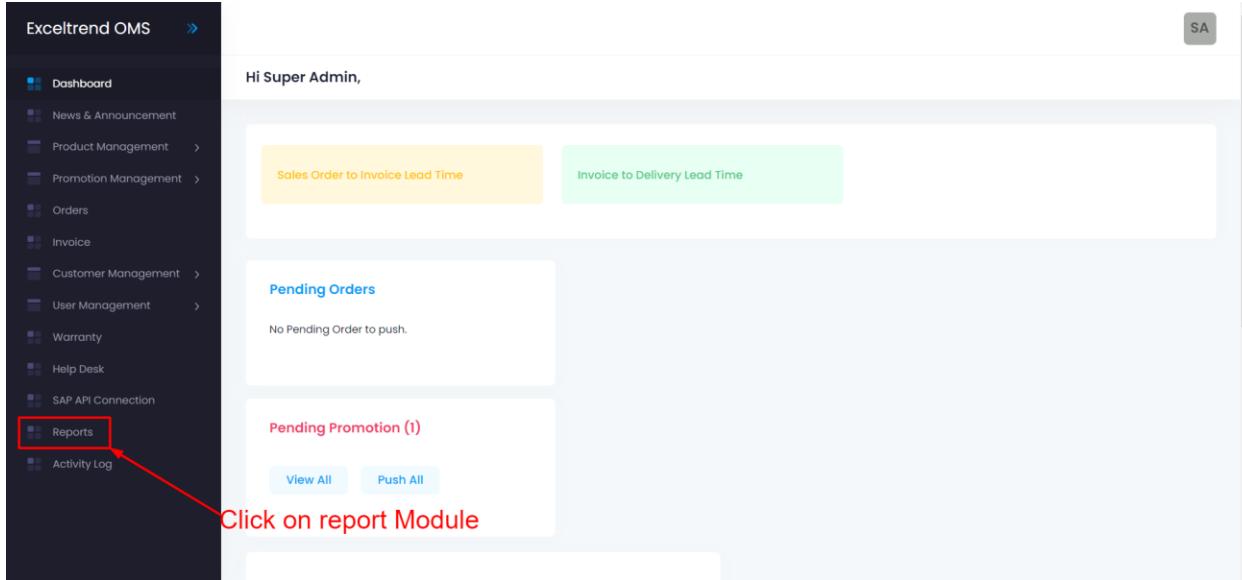
- Steps 3: - Show the all-product sales related data in listing page.

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

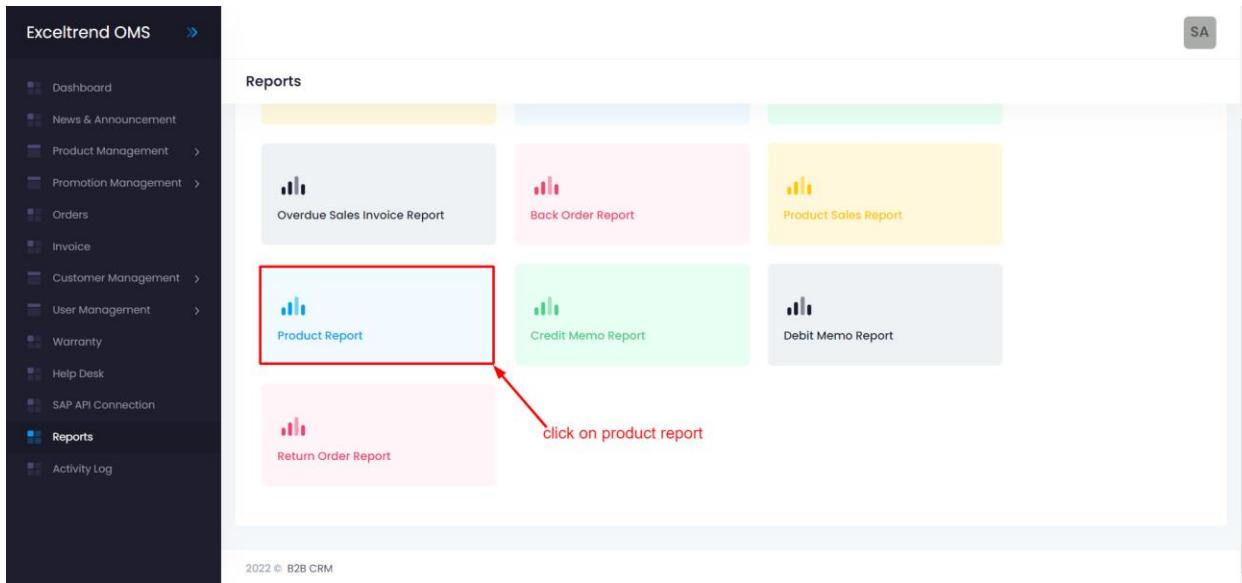
Showing 1 to 10 of 205 records

## 12.7 Product Report: -

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



- Steps 2: - Click on Product report.



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

## 12.8 Credit Memo Report: -

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

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

- Steps 2: - Click on Credit memo report.

The screenshot shows the 'Reports' section of the Exceltrend OMS. It displays several report cards arranged in a grid:

- Promotions Report (yellow)
- Sales Report (light blue)
- Sales Order Report (light green)
- Overdue Sales Invoice Report (grey)
- Back Order Report (pink)
- Product Sales Report (yellow)
- Product Report (light blue)
- Credit Memo Report (highlighted with a red box)**
- Debit Memo Report (grey)
- Return Order Report (pink)

A red arrow points to the 'Credit Memo Report' card with the text 'click on credit memo report'.

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

The screenshot shows the 'Credit Memo Report' page. The interface includes:

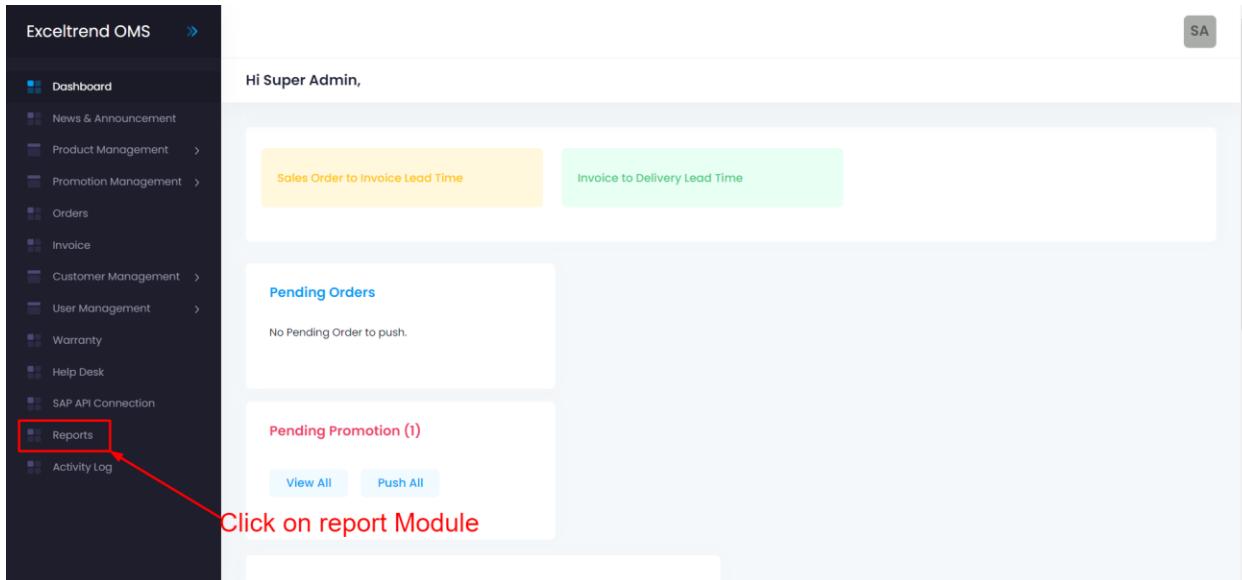
- Left sidebar: Exceltrend OMS navigation menu.
- Header: 'Credit Memo Report' and 'Back' button.
- Search bar: 'Select business unit', 'Select customer', 'Search', 'Clear', 'Export Excel'.
- Table: 'List Of Records' table with columns: No, Customer Code, Customer Name, Business Unit, Open Amount, Used Amount.
- Data in 'List Of Records' table:

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

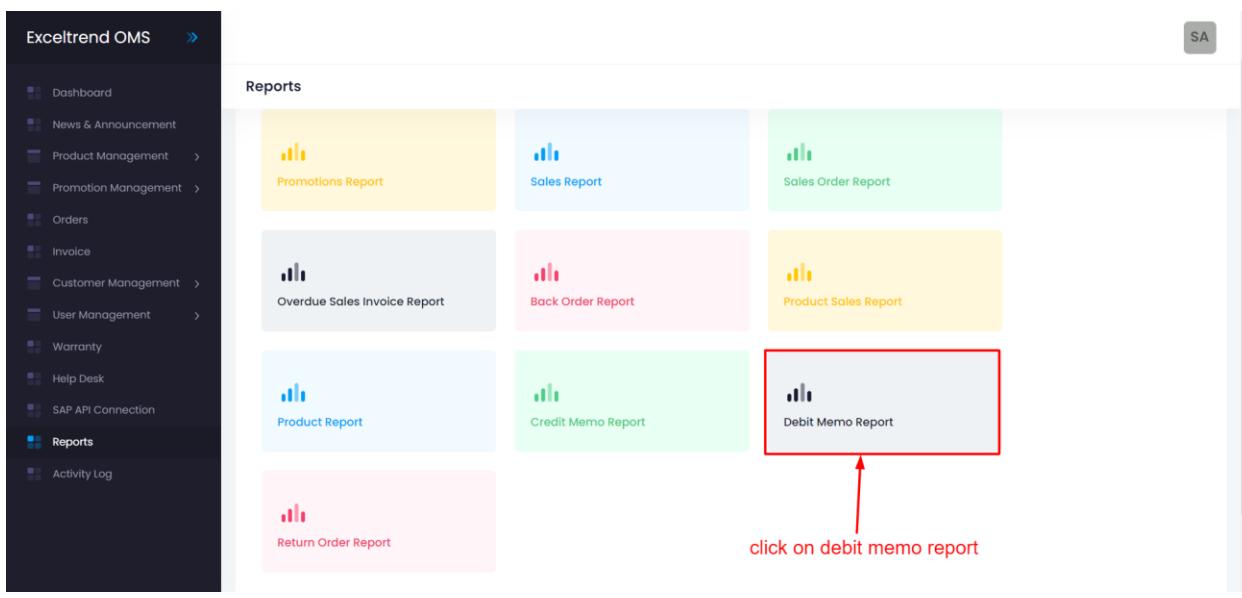
- Page footer: 'Showing 1 to 10 of 664 records' and a page navigation bar.
- Page bottom: '2022 © B2B CRM'.

## 12.9 Debit Memo Report: -

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



- Steps 2: - Click on Debit Memo report.

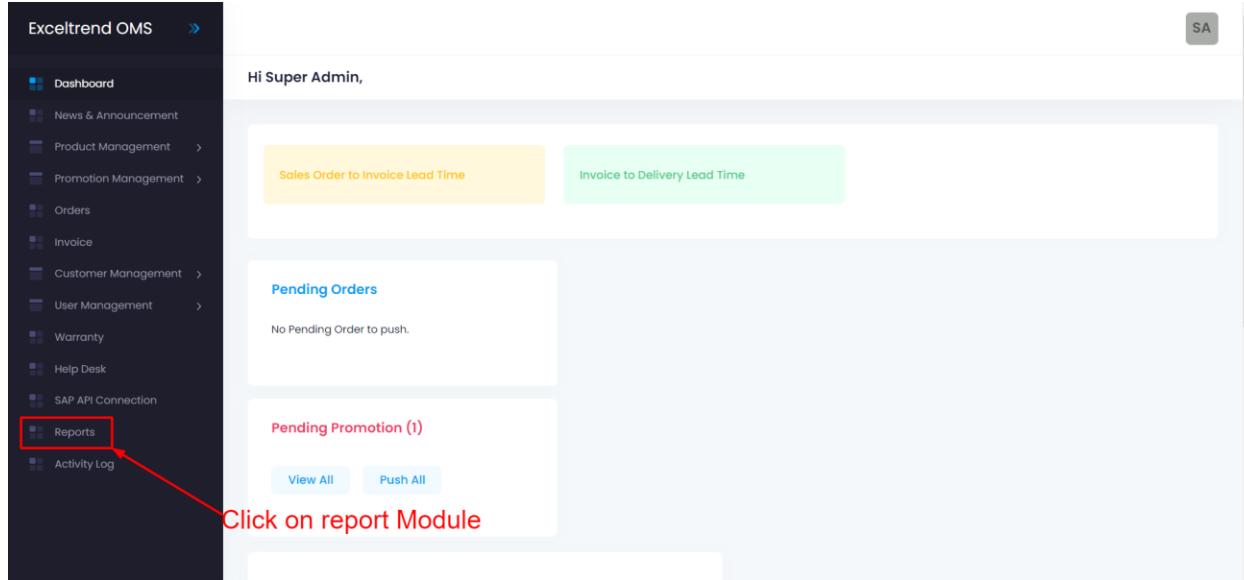


- Steps 3: - Show all debit memo related data show in listing page.

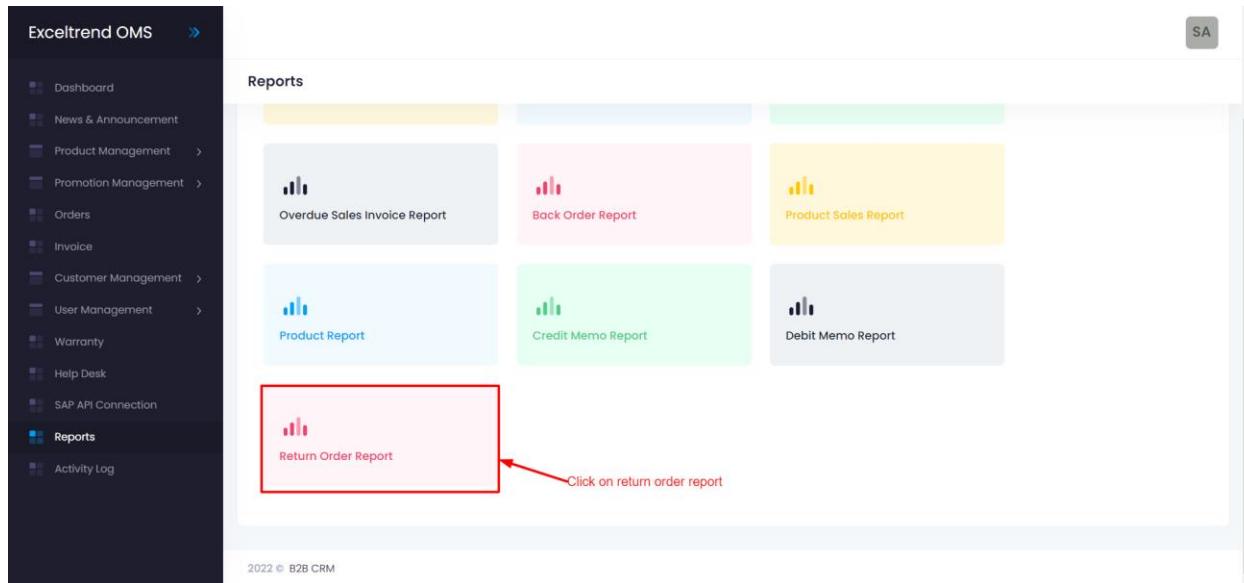
No	Customer Code	Customer Name	Business Unit	Open Amount	Used Amount
1	C13842	BRYANT MILLING & MARKETING	NTMC	P -2,250.00	P 0.00
2	C12605	TOMAS CAR ACCESSORIES	APBW	P -349.28	P 0.00

### **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>
- **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

Showing 1 to 10 of 2,832 records

## 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>
- **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 highlighting the 'Reports' link. A red arrow points from the text 'Click on report module' to this highlighted link. The main content area displays various pending tasks and lead times:

- 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**: A chart showing values around 2.0 and 1.6.
- Product Reports**: A chart showing values around 5000 and 4000.

- 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. In the main content area, there is 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.'

Icon	Report Name
Megaphone	Promotions Report
Gavel	Sales Report
Calendar	Sales Order Report
Document	Overdue Sales Invoice Report
Gears	Back Order Report
Bar chart	Product Sales Report
Cube	Product Report
Document	Credit Memo Report
Scale	Debit Memo Report
Return arrow	Return Order Report
Document	Sales Order to invoice Lead Time
Delivery truck	Invoice to Delivery Lead Time

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

**Sales Order To Invoice Lead Time Report**

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>
- **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. A red arrow points from the text 'Click on report module' to this red box. The main content area displays various reports and metrics. At the top, it says 'Hi Super Admin,'. Below that are sections for 'Pending Orders (2)' and 'Pending Promotion'. There are two cards showing lead times: 'Sales Order to Invoice Lead Time' (2 Day(s)) and 'Invoice to Delivery Lead Time' (4 Day(s)). Below these are sections for 'Promotion Reports' and 'Product Reports', each with a chart.

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

The screenshot shows the 'Reports' page within the Exceltrend OMS system. The left sidebar is identical to the previous dashboard screenshot. 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' located below the grid.

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

The screenshot shows the Exceltrend OMS system interface. On the left is a dark sidebar with navigation links: Dashboard, News & Announcement, Product Management, Promotion Management, Orders, Invoice, Customer Management, User Management, Warranty, Help Desk, SAP API Connection, Reports, and Activity Log. The main area is titled "Invoice To Delivery Lead Time Report". It features search and export buttons at the top. Below is a table titled "List Of Records" with columns: No, Customer Name, Business Unit, Invoice Date, Invoice No, Sales Specialist, Delivery Date, Delivery Status, Reference/Order No, and Lead Time. The table contains 10 rows of data. At the bottom, it says "Showing 1 to 10 of 500 records" and includes a page navigation bar.

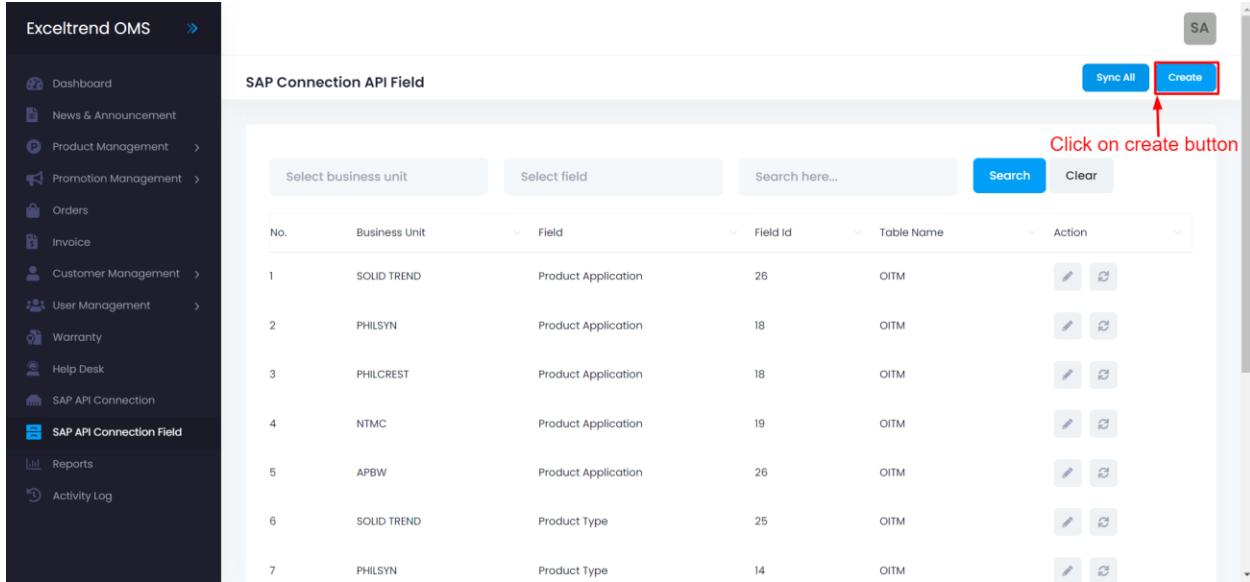
No	Customer Name	Business Unit	Invoice Date	Invoice No	Sales Specialist	Delivery Date	Delivery Status	Reference/Order No	Lead Time
1	SHEPERED SURPLUS AND AUTO PARTS	APBW	Mar 07, 2022	70003692	CLARITO CANICO	Mar 08, 2022	FD	-	1 Day(s)
2	VISAYAS NAJ TRADING, INC.	APBW	Feb 28, 2022	I00031923	VON SAYSON	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 28, 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)

### 13. 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>

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

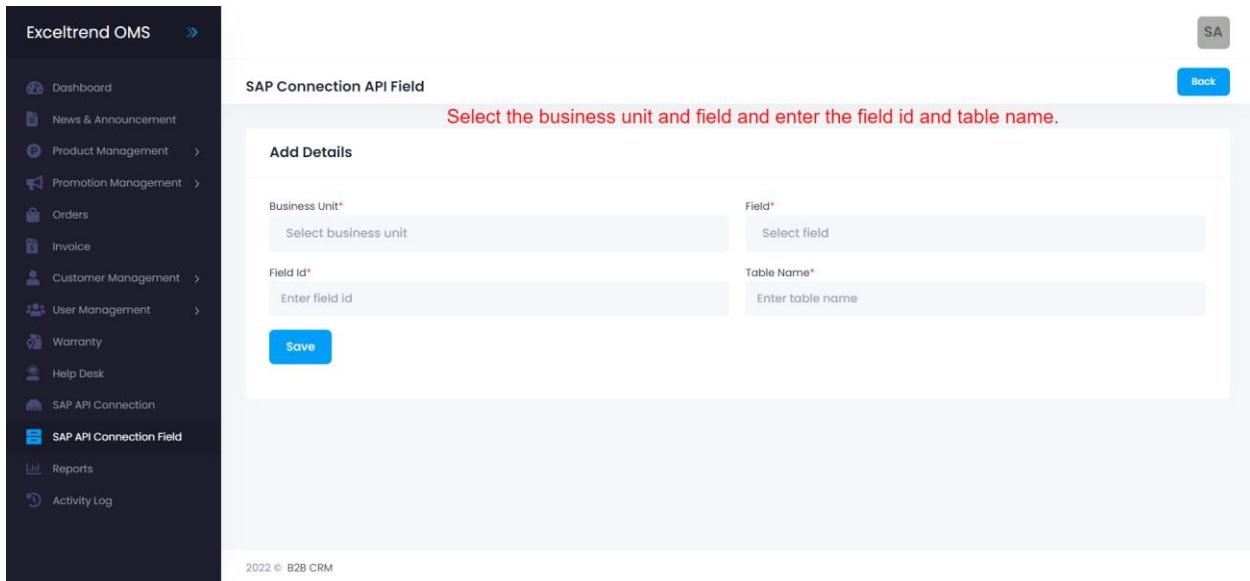
- Steps 1: - Click on create button.



The screenshot shows the 'SAP Connection API Field' list page. At the top right, there are two buttons: 'Sync All' and 'Create'. A red arrow points to the 'Create' button, which is highlighted with a red box. Below the buttons is a search bar with fields for 'Select business unit', 'Select field', and 'Search here...', along with 'Search' and 'Clear' buttons.

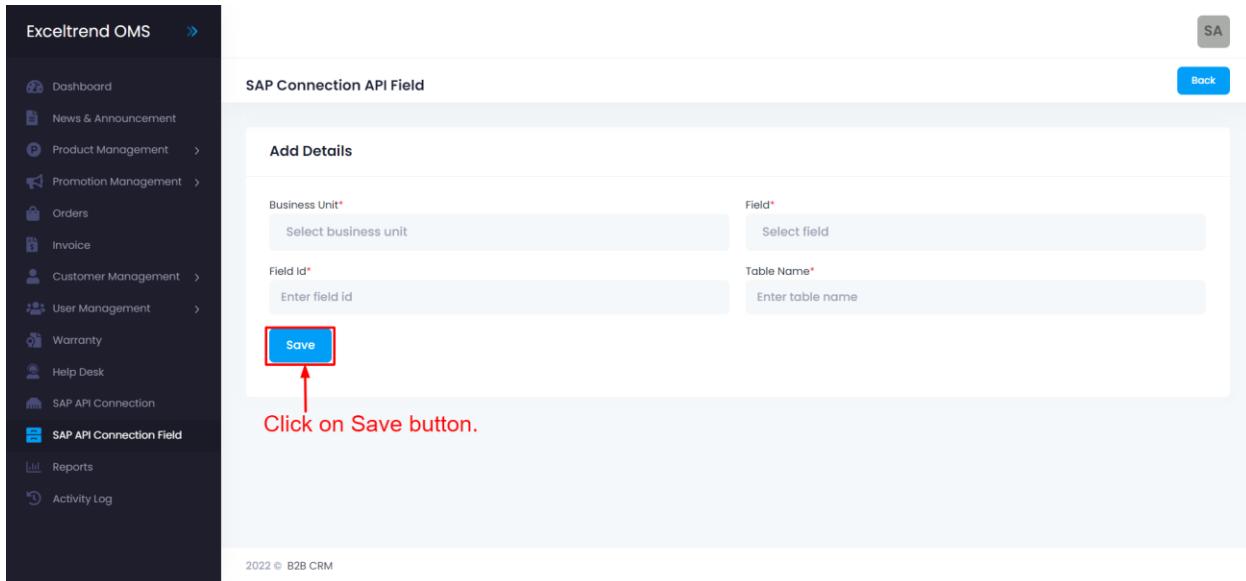
No.	Business Unit	Field	Field Id	Table Name	Action
1	SOLID TREND	Product Application	26	OITM	
2	PHILSYN	Product Application	18	OITM	
3	PHILCREST	Product Application	18	OITM	
4	NTMC	Product Application	19	OITM	
5	APBW	Product Application	26	OITM	
6	SOLID TREND	Product Type	25	OITM	
7	PHILSYN	Product Type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

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



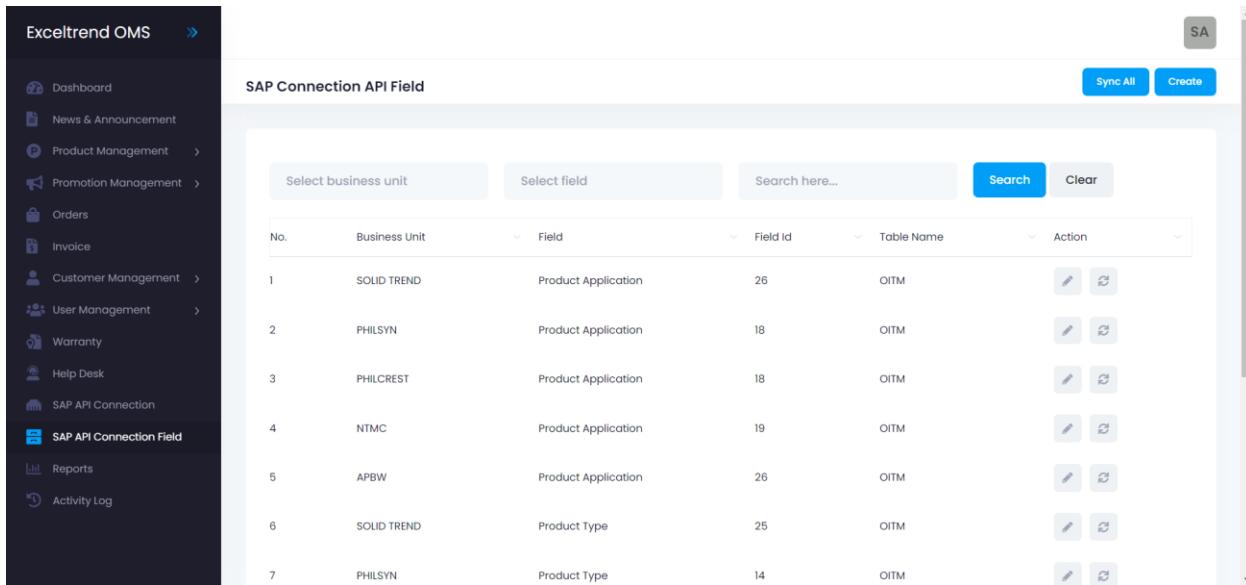
The screenshot shows the 'Add Details' form for creating a new SAP Connection API Field. The form includes fields for 'Business Unit\*', 'Field\*', 'Field Id\*', and 'Table Name\*'. Each field has a dropdown placeholder: 'Select business unit', 'Select field', 'Enter field id', and 'Enter table name'. At the bottom left is a 'Save' button, which is highlighted with a red box. Above the form, a red text message reads: 'Select the business unit and field and enter the field id and table name.'

- Steps 3: - Click on Save button.



The screenshot shows the 'Add Details' section of the SAP Connection API Field creation form. It includes fields for Business Unit, Field Id, Select business unit, Enter field id, Select field, and Table Name. A prominent blue 'Save' button is at the bottom left. A red box highlights the 'Save' button, and a red arrow points to it from the text 'Click on Save button.' located below the form.

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

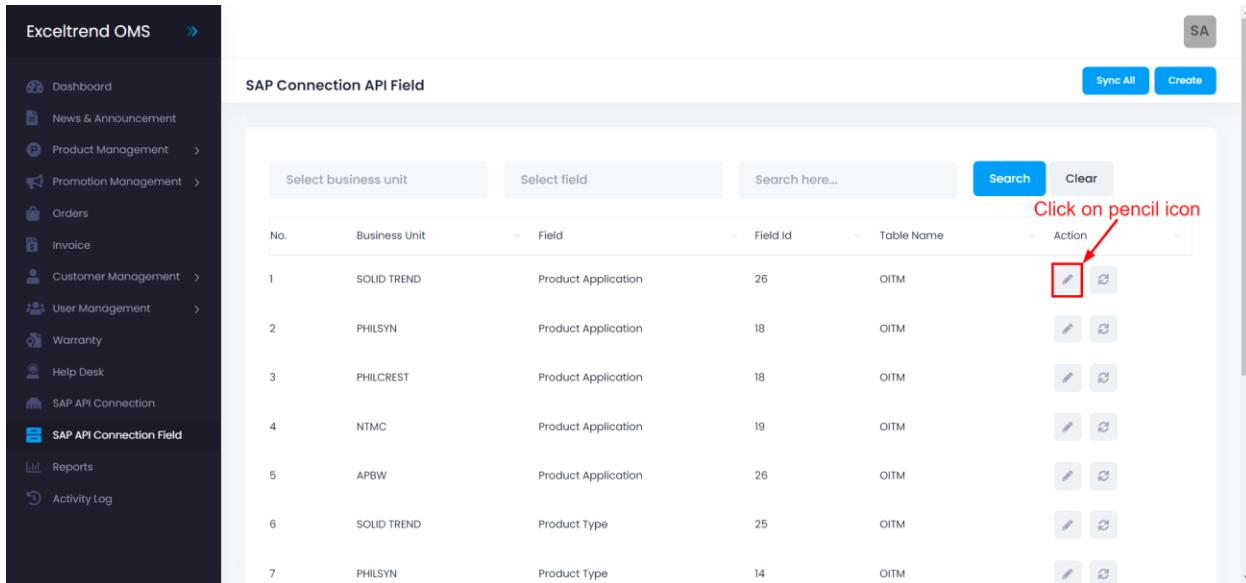


The screenshot shows a table listing SAP Connection API fields. The columns are No., Business Unit, Field, Field Id, Table Name, and Action. There are seven entries:

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	

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

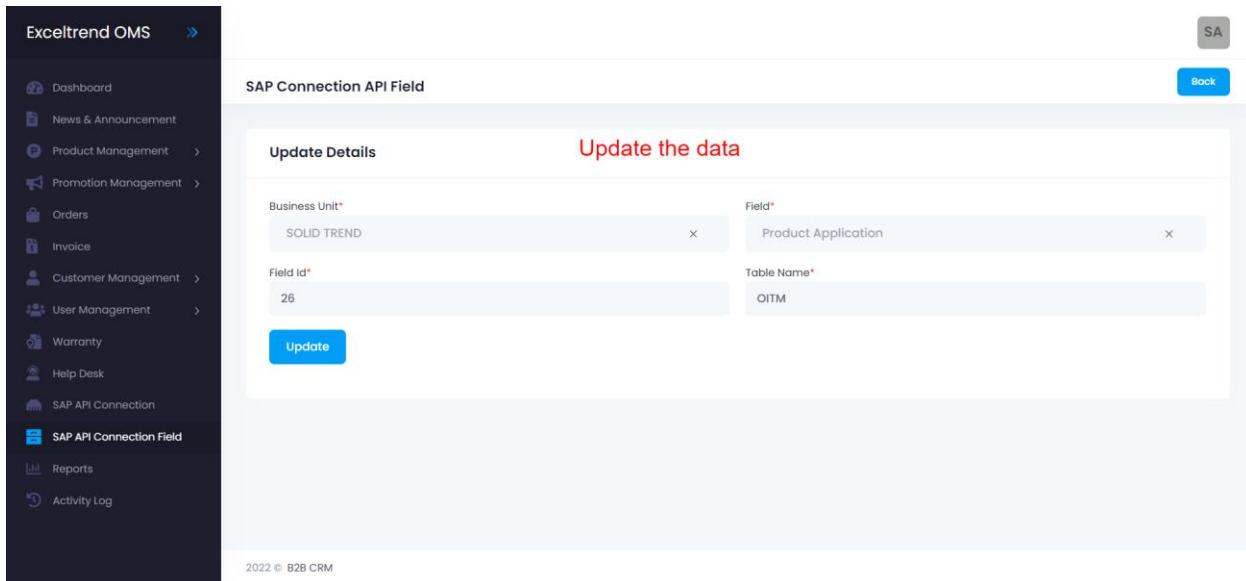
- Steps 1: - Click on pencil icon.



The screenshot shows a list of SAP Connection API Fields. The first row, which has a red box around it, represents a field for 'SOLID TREND' with 'Product Application' as the field name, '26' as the Field Id, and 'OITM' as the Table Name. The 'Action' column for this row contains a pencil icon, which is highlighted with a red box and accompanied by the text 'Click on pencil icon'.

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.



The screenshot shows the 'Update Details' section of the SAP Connection API Field update page. It displays the current values for 'Business Unit\*' (SOLID TREND) and 'Field\*' (Product Application). Below these fields is an 'Update' button.

- Steps 3: - Click on update button.

SAP Connection API Field

Update Details

Business Unit\* SOLID TREND

Field\* Product Application

Field Id\* 26

Table Name\* OITM

Update

Click on update button