



D & W (ASIA) LTD.

## **D&W Project Tracking Software (TRAX)**

### User's Instruction Manual

Create By

IT Department

## Content

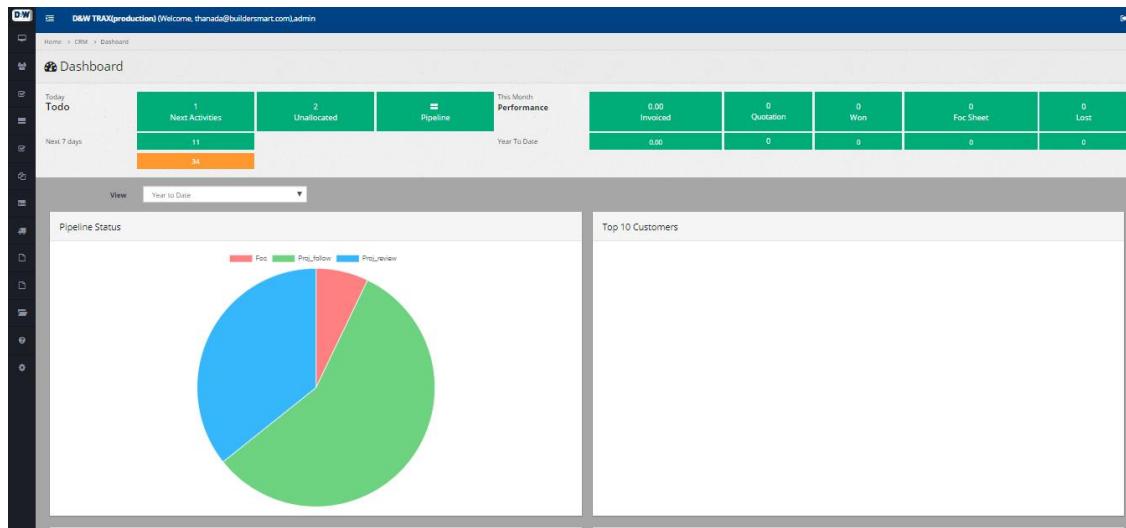
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## CRM

- **Dashboard**

This page will show summary of login user data (sales will see own data and manager will see their team data.) such as total of next activities, total of unallocated customer, total of invoiced, total of quotation, total of FOC sheet, Also see the summary graph base with month or year to date selected.

- Next Activities will go to next activities page
- Unallocated will go to unallocated customer
- Pipeline will go to my pipeline page



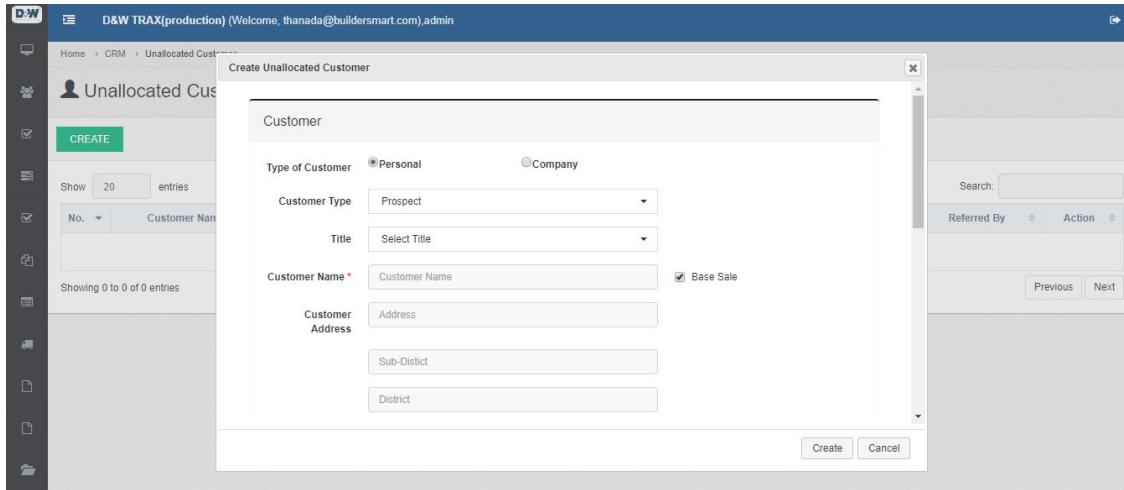
(Dashboard)

- **Unallocated Customer**

This page is for sales create new customer. Sales can input customer data and create next activities after submitting the data email will send to manager to approve to customer list (manager must approve for prevent duplicate data)

The screenshot shows the 'Unallocated Customer' list page. At the top, there's a 'CREATE' button. Below it is a search bar and a table header with columns: No., Customer Name, Type of Customer, Phone, Mobile, Email, Customer Type, Base Sale, Referred By, and Action. A single entry is listed: No. 1, Customer Name 'test', Type of Customer 'Personal', Phone '-', Mobile '0000000000', Email '-', Customer Type 'Prospect', Base Sale 'Yes', Referred By 'Kamonthip sahatrangsinee', and Action buttons. At the bottom, it says 'Showing 1 to 1 of 1 entries'.

(Unallocated Customer List)



*(Dialog to create new unallocated customer when click at create button)*

- Customer Type, you can select customer type in this.
  - Prospect
  - Architect
  - Contractor
  - Developer
  - End Users
  - Dealer
- Contact, you can create contact person
- Activity(optional) you can create first activity when create unallocated customer.

- My Customers**

This page will show all customers data after manager approve in unallocated customer page. This page will separate customer by customer type (Prospect, Architect, Contractor, Developer, End Users, Dealer), can change the view to grid or table, can search by customer type or change to table view to search customer name etc. Can see the detail of customer, update the detail and create contact of customer.

Prospect	Architect	Contractor	Developer	End Users	Dealer
Name : customer for test it Phone: 0814440715 Mobile :0874454554 Email : Other Contact :- Referred by : Saranya silapetchanan	Name : Motion arch Phone: 0814440715 Mobile :0959532511 Email : Other Contact :- Referred by : Porntip lemunthavornchai	Name : World Trade and Accommodation Co.,Ltd. Phone: 0891634969 Email : Nom.wta@gmail.com Other Contact :- Referred by : Onanong sribanpot	Name : Richie Houses Phone: 0869021444 Email : Other Contact :- Referred by : Atcharapan watkeekool	Name : Baan Thai Rom Klaow Co.,Ltd. Phone: 0914645556 Mobile :0819799439 Email : Kachapat.chang@yahoo.co.th Other Contact :- Referred by : Atcharapan watkeekool	Name : Mr. Nont Pongpaiboon Phone: 0815542332 Mobile :0868850881 Email : Other Contact :- Referred by : Atcharapan watkeekool
Name : SANGFAH CONSTRUCTION CO.,LTD Phone: 023911163 Mobile :0835404175 Email : Other Contact : Weerayuth Manjit Referred by : Kamonthip sahatrangsinee	Name : LAMOONTA ARCHITECTS CO.,LTD Phone: 0989088961 Mobile :0989088961 Email : Other Contact :- Referred by : Kamonthip sahatrangsinee	Name : Spectrum Architects and Interiors Co., Ltd Phone: 0880395555 Mobile :0880395555 Email : Ctccho@civiltechdesign.com Other Contact :- Referred by : Porntip lemunthavornchai	Name : Tritchada Phone: 082912888 Mobile :082912888 Email : Other Contact :- Referred by : Atcharapan watkeekool	Name : Shera Public Company Limited Phone: 022912888 Mobile :022912888 Email : Other Contact :- Referred by : Atcharapan watkeekool	Name : Deceuninck (Thailand) Co.,Ltd Phone: 0868850881 Mobile :0868850881 Email : Wirata.s@deceuninck.co.th Other Contact :- Referred by : Atcharapan watkeekool

(My Customers – Grid View)

No	Customer Name	Type of Customer	Phone	Mobile	Email	Customer Type	Country	Sales Name
1	Motion arch	Company	0814440715	0959532511		Architect	Thailand	porntip lemunthavornchai
2	LAMOONTA ARCHITECTS CO.,LTD	Company		0989086961		Architect	Thailand	kamonthip sahatrangsinee
3	Spectrum Architects and Interiors Co., Ltd	Company	028652760	0874441011		Architect	Thailand	punyaporn supavong
4	The Park Avenue Private	Company		0880395555		Architect	Thailand	pattanicha thanaratthuyaphob
5	Tectonics Architects Co., Ltd	Company	022487708		Aritachch@tectonics.co.th	Architect	Thailand	punyaporn supavong
6	World Trade and Accommodation Co.,Ltd.	Company		0891634969	Nom.wta@gmail.com	Contractor	Thailand	onanong sribanpot
7	TIGON DESIGN GROUP, LTD PART	Company	029497440			Architect	Thailand	kamonthip sahatrangsinee
8	NMPSTUDIO	Company	022798541	0875692894	Ap.namalpractice@gmail.com	Architect	Thailand	kamonthip sahatrangsinee

(My Customers – Table View)

Customer Type \* Architect  
 Title Select Title  
 Customer Name \* Motion arch  
 Address 5 ladpao - wanghin 37  
 Phone 0814440715  
 Mobile \* 0959532511  
 Fax Fax  
 Email Email  
 Grade Market Size Small  
 Referred By \* Porntip lemunthavornchai  
 Customer Tax ID Customer Tax ID  
 Currency Thai Baht (THB)

(Customer Details)

- **Projects**

This page will keep all about project. Can create, edit, make loss or on hold project. Loss and on hold project will apply all pipeline under the project (project for review, project follow up, quote 50%, quote 80%, FOC almost submitted) After submit project the page will redirect to create pipeline.

No.	Project Name	Customer	Customer Tax ID	Architect	Country	Project Status	Sales
1	Mr Harsha Viji Residence	World Trade and Accommodation Co. Ltd.			India		Atcharapan watkeekool
2	Four villas	HA DESIGN & ASSOACIATES		Maincourse Architect	Thailand		Nalinee robkob
3	Bean Residence	ADVANCE GLASS CO.,LTD.			Thailand		Onanong sribanpot
4	Aquella - Golfer Facilities	KMIT Construction Co., Ltd.			Thailand		Atcharapan watkeekool
5	Marc Hagelauer Residence	3Mtec Engineering Co.,Ltd.			Thailand		Atcharapan watkeekool
6	Punthai		ARTISAN ARCHITECTS CO.,LTD	Thailand			Onanong sribanpot
7	Waterfall Glass W10		Choice Interiors co. ltd	Thailand			Atcharapan watkeekool

(Projects List)

The screenshot shows a software interface titled 'Details/Edit Project'. At the top, there are three buttons: 'Save' (highlighted in green), 'Loss Project', and 'On Hold Project'. Below these buttons, there are several input fields and dropdown menus. The 'Project Name' field contains 'Mr Harsha Viji Residence'. The 'Sales Person' dropdown is set to 'Atcharapen watkeekool'. Under 'Architect' and 'Designer', both dropdowns show 'Select Architect' and 'Select Designer' respectively. The 'Customer' dropdown shows 'World Trade and Accommodation Co.,Ltd.'. The 'Project Address' field contains '6, Ranjith Road, Kotturpuram,'. Below it, 'Sub-District' is listed as 'Chennai', 'Country' is 'India', and 'State' is 'Tamil Nadu'. There is also a numeric input field containing '0'.

(Project Details)

- **My Pipeline**

This page is for create and follow the project (one pipeline/one quotation) can manage the lot with expect delivery value and expect delivery date, billing information, color, lot, and items (after pull quotation). The status of pipeline will follow the step

- Project for review (First status when create pipeline)
- Project for follow up (When create activity the status will change)
- Quote 50% (After you create request form list and planner get the data already, and pull quotation to pipeline the status will change)
- Quote 80% (You can confirm to Quote 80% by click the button "Change to Quote80" in Quote50 status or drag your pipeline to quote 80% in pipeline page)
- FOC almost submitted (After you put the detail of first deposit received the status will change to this status or you can request to your director to approve the pipeline without deposit receive)
- Expect delivery (After do site survey finish and you already create FOC sheet this will change status automatic)

\*Pipeline grid view show for Project for review, project for follow up, quote 50%, quote 80%, FOC almost submitted, expect delivery but if you change to table view all status will show in table (can search and filter the data)

- a. Create button: for create new pipeline
- b. Create RFQ: for create request form for quotation

(My Pipeline Page - Grid view)

Pipeline No	Quotation No	Project Name	Current Pipeline	Customer Name	Architect	Designer	Quotation Amount	Expected Revenue	Country	Sales
1 00016	000	VSS Staff House	Site Survey	Build Architect Co.,Ltd.			0.00	0.00	Thailand	Punyaporn supavong
2 00015	Q191000002	BSM New Workspace	Expected Delivery	D&W (Asia) Ltd.			8,666.97	0.00	Thailand	Saranya silapetchanan
3 00014	000	Suchada Residence	Site Survey	Mazz interior design and management Co.,Ltd			0.00	0.00	Thailand	Punyaporn supavong
4 00013	000	Sansara - PMI 128 Apartment B4-02 Type B1	Site Survey	Sansara Development Ltd.	THE BEAUMONT PARTNERS CO.,LTD		0.00	40,000.00	Thailand	Saranya silapetchanan
5 00012	000	Khun Hathairat's Residence	Site Survey	Ruhr Management			0.00	0.00	Thailand	Punyaporn supavong
6 00011	000	Sansara - PMI 125 Apartment A4-03 Type B2	Site Survey	Sansara Development Ltd.	THE BEAUMONT PARTNERS CO.,LTD		0.00	40,000.00	Thailand	Saranya silapetchanan

(My Pipeline Page – List view)

The screenshot shows a software application window titled "My Pipeline Create". The interface is divided into several sections:

- Project Details:** Includes fields for "Project Name" (dropdown), "Project Address" (text input), "Architect" (dropdown), "Designer" (dropdown), "Customer" (dropdown), and "Currency" (dropdown). It also shows a note: "Rate active from 2019-08-01 to 2019-12-31".
- Delivery Expectation:** A section titled "Expect Delivery" with fields for "Total of Lot" (text input), "Lot" (text input), "Expect Delivery Date" (calendar icon), and "Expect Delivery Value" (text input).
- Billing & Deposit Details:** A section titled "Billing Details" with fields for "Billing Name" (dropdown), "Billing Address" (text input), "Thailand" (dropdown), "Bangkok" (dropdown), and "Billing Phone" (text input).

### (Pipeline create)

- Pipeline create you can select project name and other data that relate with project will show in the detail, floor plan and door schedule will be coming from request for quotation create
- Lot, you can put number of the lot to expect the delivery, after you get quotation lot will get from request for quotation to default in pipeline.
- Billing and deposit details.

Billing details, default with customer detail you can change it.

Deposit, will show after you change status of pipeline from quote50% to quote 80%

**Billing Details**

Billing Name \*: Sansara Development Ltd.

Billing Address: 905/7 Soi 51 Rama 3 Road  
Bangpongpong  
Yannawa  
Thailand  
Bangkok Zip: 10120

Billing Phone: 66632680088

**Deposit Details**

Deposit Slip: [Browse file](#)

Deposit Amount Total(Inc.VAT): 487,161.10

Product Total: 487,161.10

Percent(%): Percent

Deposit Received: 0.00

Deposit Received Date:  [Calendar](#)

\*Updated pending approval.

**Quotation Details**

Selected Color: Group 2

Grey Sahare (1002831PX20)

[View Quotation](#)

No.	Item Des	Size			Glass	Price					Lot
		Height	Width	Sqm.		Install	Product	Unit Price	Quantity	Total	
1	Level Sill Sliding OX	2,850	3,650	10.40	Clear Tempered 8mm	7,801.88	56,728.66	64,530.54	1.00	64,530.54	1 <a href="#">▼</a>
2	Level Sill Stacking OXX	2,800	6,750	18.90	Clear Tempered 8mm	14,175.00	105,935.87	120,110.87	1.00	120,110.87	1 <a href="#">▼</a>
3	Level Sill Stacking XXO	2,800	6,750	18.90	Clear Tempered 8mm	14,175.00	105,935.87	120,110.87	1.00	120,110.87	1 <a href="#">^</a>

(Manage Deposit receive and Lot of items)

- The group and color will come from RFQ after you get quotation to pipeline and you can select lot for item (lot will come from RFQ and the detail that you input in expect delivery tab)
- When status is Quote80%, can forecast material to ERP by click "Forecast Material"

- **Request Form List**

This page is for RFQ (Request for Quotation), RFS (Request for Site Survey), RFI (Request for Invoice), RFD (Request for Draft Drawing) it's had separate tab, user can see pending and complete list. Pending It's mean wait for relate people finish the request form, and complete it's mean request form is finish.

- RFQ (Request for Quotation)

For request quotation to pipeline planner will pull data from the other system to Trax, user will pull to pipeline and can print out to quotation from Trax. Floor plan, door schedule, delivery lot, vat charge, installation charge, preliminaries is required, and user must select the system and put other detail for planner to create quotation.

(Request List)

**Request Create - Quotation**

**Create** **Discard**

Request Date	26-09-2019	Customer	Select Customer
Quote version	Select Version	Customer Address	Customer Address(No.)
Sales Person *	Select Sales	Sub-District	Sub-District
Project Name *	Select Project	District	District
Project Address	Address	Select Country	Select Country
	Sub-District	Select Province	Select Province
	District	ZIP	ZIP
Floor Plan	Browse file	Customer Phone	Phone

**Production Information**

System	Select System	Color Group	Select Group Color
Note			
Hardware	Select Hardware	Color Type	Select System Color
Note			
Glass Type	Select Glass Type	Color	Select Hardware Color
Note			
		Thick	Select Thick Glass

**Price Information**

Product Price	Service Charge
Buffer	Delivery Lot
Discount	Preliminaries
<input type="checkbox"/> VAT Charge	Extra Delivery Charge
<input type="checkbox"/> Installation Charge	Extra Installation Charge
<input type="checkbox"/> Preliminaries	

**Specific Information**

- The price in this quotation is approximately estimated by door & window schedule, then the price will be changed when we get the actual dimension from the site.
- This quotation is quoted for Standard Powdercoat. In case that the customer would like to choose different powdercoat spec (Timber / Sahara / Electro), the price will be changed.

(Request for quotation create)

### - RFS (Request for Site Survey)

This page for request site team to site survey, this will base with pipeline you can select project and pipeline in the list.

The screenshot shows the 'Request Create - Site Survey' interface. It features a left sidebar with various icons. The main area has tabs for 'Create' and 'Discard'. The 'Create' tab is active. The form contains several input fields: 'Request Date' (set to 03-10-2019), 'Request Type' (set to 'Site Survey'), 'Sales Person' (a dropdown menu), 'Project Name' (a dropdown menu), 'Pipeline No.' (a dropdown menu), 'Pipeline Lot' (a dropdown menu), 'Project Address' (with sub-fields for 'Address', 'Sub-District', 'District', 'Select Country', 'Select Province', and 'ZIP'), 'Customer' (a dropdown menu), 'Customer Address' (with sub-fields for 'Customer Address(No.)', 'Sub-District', 'District', 'Select Country', 'Select Province', and 'ZIP'), 'Customer Phone' (a text input field), and 'Customer Email' (a text input field).

(RFS- Request for Site Survey)

### - RFI (Request for Invoice)

This page will request to accounting or finance to create invoice separate by invoice type – first deposit, second deposit, or installation fee for the pipeline that you selected.

The screenshot shows the 'Request Create - Invoice' interface. It has a similar structure to the RFS form, with a sidebar and 'Create'/'Discard' tabs. The 'Create' tab is active. The form fields include: 'Request Date' (03-10-2019), 'Request Type' (set to 'Invoice'), 'Invoice Type' (a dropdown menu), 'Sales Person' (a dropdown menu), 'Project Name' (a dropdown menu), 'Pipeline No.' (a dropdown menu), 'Pipeline Lot' (a dropdown menu), 'Project Address' (with sub-fields for 'Address', 'Sub-District', 'District', 'Select Country', 'Select Province', and 'ZIP'), 'Customer' (a dropdown menu), 'Customer Address' (with sub-fields for 'Customer Address(No.)', 'Sub-District', 'District', 'Select Country', 'Select Province', and 'ZIP'), 'Customer Phone' (a text input field), and 'Customer Email' (a text input field).

(RFI – Request for Invoice)

### - RFD (Request for Draft Drawing)

(RFD – Request for Draft Drawing)

#### • Next Activities

This page is for create activity relate with customer, project, or pipeline. Can follow up the activity and see activity in calendar or table view.

Activity type list:

- Follow up customer
- Present new customer
- Site survey
- Quote new quotation
- Revise quotation
- Re-visit customer
- Site measurement
- Clear drawing with customer
- Give sample to customer
- Call for project update
- Other

You can click at the item in calendar to see the detail of activity that you create, and if change to list view if plan date is overdue from your plan date the color of the text will change to red color.

When you create activity, you can follow up the activity, that will be show in homepage.

Next Activities

Create

OCTOBER 2019

SUN	MON	TUE	WED	THU	FRI	SAT
29	30	1	2	3	4	5
		kamonthip-Quotation & Doc nalinnee-Present new customer taranya-Quotation & Doc taranya-Quotation & Doc +2 more	naphak-Other naphak-Other	atcharapan-Quotation & Doc pantanicha-Quotation & Doc		
	6	7	8	9	10	11
	12	13	14	15	16	17
	18	19				

(Next Activity Page – calendar view)

Show 20 entries

No.	Activity	Subject	Activity Type	Activity Plan Date	Project	Customer	Status	Is Follow Up?	Sales	Action
1	<a href="#">Site Survey, Meeting, Handover</a>	sale meeting at rama3	Plan for Project	23/09/2019	-		Process	Yes	Kamonthip sahatrangsinee	
2	<a href="#">Site Survey, Meeting, Handover</a>	meeting sale with K.Yang	Plan for Project	24/09/2019	-		Process	Yes	Kamonthip sahatrangsinee	
3	<a href="#">Site Survey, Meeting, Handover</a>	meeting trax with IT	Plan for Project	25/09/2019	-		Process	Yes	Kamonthip sahatrangsinee	
4	<a href="#">Present new customer</a>	Present Nulook with Purchasing	General Plan	25/09/2019	-	SANGFAH CONSTRUCTION CO.,LTD	Process	No	Kamonthip sahatrangsinee	
5	<a href="#">Other-Bring to the sample of wood color</a>	Bring to the sample of wood color	Plan for Project	26/09/2019	Baan Surin	SH Architect Co.,Ltd.	Process	Yes	Punyeporn supavong	

(Next Activity Page – list view)

The screenshot shows the 'Create New Activity' dialog box overlaid on the CRM interface. The dialog contains fields for Customer, Project Subject, Activity, Start Time, End Time, Assign to, Subject, File, and Details. Below the dialog is a calendar view for the week starting Sunday. At the bottom right of the dialog are 'Save', 'Mark as Done', and 'Cancel' buttons.

(Create next activity)

- Order Tracking Status**

This page to tracking order status separate by lot. You can see summary detail of the lot, who update the lot, updated date. Also, can see the progress in the image what status now.

The screenshot shows the 'Order Tracking Status View' page. It features a table with columns: Pipeline No, Lot No, Quotation No., Project Name, Customer/Company Name, Expected Value, Current Status, and Sales. Below the table is a process flow diagram with various stages and icons. At the bottom is an 'Update History' table showing two entries with details like Updated Date and Updated By.

(Order tracking status view)

- Weekly Sales Task Update**

This page is for update expect delivery date for sales, if the date is already over text will change to red color. Sales can create note to keep in the system.

For update expect delivery date: click at symbol input box will show, and you can save by click at to save the data.

For add note to your pipeline: click at "View Note" to add, see the history that you note.

Home > CRM > Weekly Sales Task Update

**Weekly Sales Task Update**

Show 20 entries Search:

No.	Quotation Lot	Project Name	Customer	Status	Sales		Expected Delivery Date(Site Manager)	Sales	Note & Activity
					Expected Delivery Value	Expected Delivery Date			
1	000	Sansara - PMI 128 Apartment B4-02 Type S81	Sansara Development Ltd.	Project follow up	40,000.00	22-11-2019	-	saranya silapetchanan	<a href="#">View Note</a>
2	000	Sansara - PMI 122 Apartment A3-01 Type B1	Sansara Development Ltd.	Project follow up	60,000.00	29-11-2019	-	saranya silapetchanan	<a href="#">View Note</a>
3	000	Sansara - PMI 125 Apartment A4-03 Type B2	Sansara Development Ltd.	Project follow up	40,000.00	22-11-2019	-	saranya silapetchanan	<a href="#">View Note</a>
4	000L1	Surin Residence		Project follow up	1,500,000.00	20-11-2019	-	pattanichita thanaratthumaphob	<a href="#">View Note</a>
5	000L1	Project for test (IT)	Spectrum Architects and Interiors Co., Ltd	Project follow up	350,000.00	10-09-2019	-	kamonthip sahatrangsinee	<a href="#">View Note</a>
6	000L1	Baan Sa Merng	3Mtec Engineering Co.,Ltd.	Project follow up	1,826,031.08	30-07-2020	-	naphak witchakompetch	<a href="#">View Note</a>
7	000L1	Sansara - PMI 131 Apartment B4-04 Type S82	Sansara Development Ltd.	Project follow up	40,000.00	22-11-2019	-	saranya silapetchanan	<a href="#">View Note</a>
8	Q190900002LT	Sansara - Bar	Sansara Development Ltd.	Foc almost submitted	336,184.00	15-11-2019	-	saranya silapetchanan	<a href="#">View Note</a>
9	Q191000002LT	BSM New Workspace	D&W (Asia) Ltd.	Foc almost submitted	0.00	02-11-2019	-	saranya silapetchanan	<a href="#">View Note</a>

Showing 1 to 9 of 9 entries Previous 1 Next

(Weekly task update list)

**Note**

New Note \*

Save and Close Save and Request Quotation Save and Next Activity

Show 20 entries Search:

No.	Note	By	Date Create
No data available in table			

Showing 0 to 0 of 0 entries Previous Next

Cancel

(Dialog to create note)

## Authorized List

This page for director or authorized approver to approve pipeline that request for deposit receive under 50% or request without deposit to change pipeline status to FOC almost summit.

For approve click at ✓ to approve pipeline that request to quote 80% and click at ✗ to reject that pipeline or click to view the detail and click at the button "Approve" or "Reject"

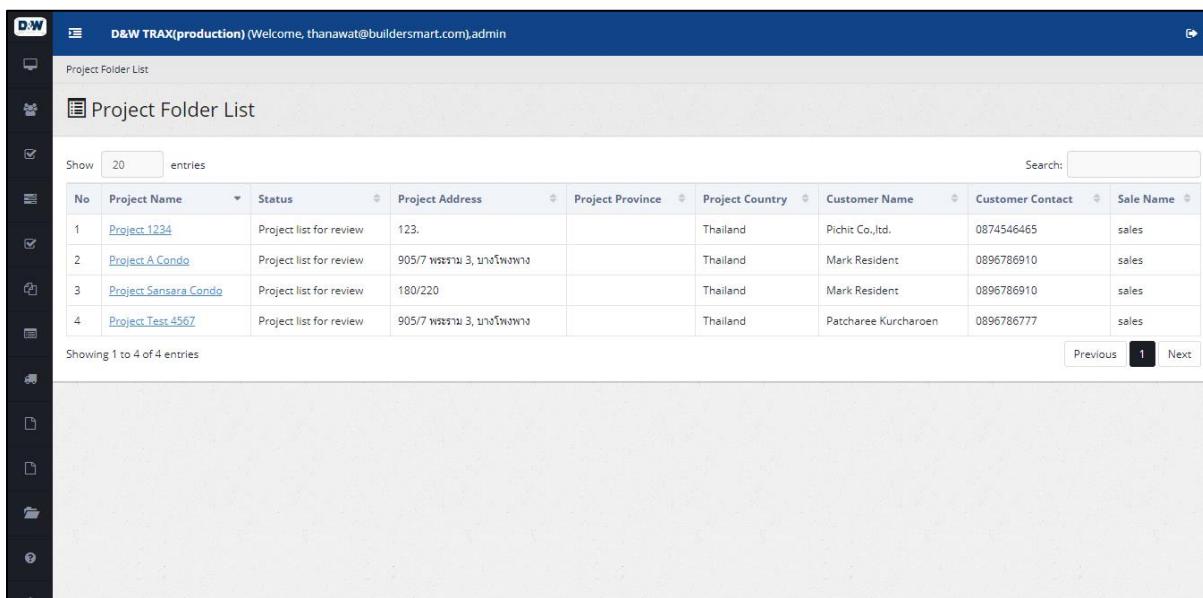
No	Quotation No	Project Name	Current Pipeline	Customer Name	Architect	Quotation Amount	Deposit Receive	Deposit Percent	Country	Sales	Action
1	Q19090002	Sansara - Bar	Foc almost submitted	Sansara Development Ltd.	THE BEAUMONT PARTNERS CO.,LTD	487,161.10	0.00		Thailand	Saranya silapetchanan	✓ ✗
2	Q19100002	BSM New Workspace	Foc almost submitted	D&W (Asia) Ltd.		8,666.97	0.00		Thailand	Saranya silapetchanan	✓ ✗

(Authorize page for director or approver)

## Project Folder List

This a page for view your documents or attach related files after have project, there will be a table show project information as below:

1. No
2. Project Name
3. Status
4. Project Address
5. Project Province
6. Project Country
7. Customer Name
8. Contact Customer
9. Sales Name



The screenshot shows a web-based application interface titled "D&W TRAX(production) (Welcome, thanawat@buildersmart.com).admin". The main title is "Project Folder List". On the left, there is a vertical sidebar with icons for dashboard, project, customer, contact, and document management. The main content area displays a table with the following data:

No	Project Name	Status	Project Address	Project Province	Project Country	Customer Name	Customer Contact	Sale Name
1	<a href="#">Project 1234</a>	Project list for review	123.		Thailand	Pichit Co.,ltd.	0874546465	sales
2	<a href="#">Project A Condo</a>	Project list for review	905/7 អេប្រាន 3, បាសាគមារោ		Thailand	Mark Resident	0896786910	sales
3	<a href="#">Project Sansara Condo</a>	Project list for review	180/220		Thailand	Mark Resident	0896786910	sales
4	<a href="#">Project Test 4567</a>	Project list for review	905/7 អេប្រាន 3, បាសាគមារោ		Thailand	Patcharee Kurchaoren	0896786777	sales

Below the table, it says "Showing 1 to 4 of 4 entries". At the bottom right, there are buttons for "Previous", "Next", and a page number input field containing "1".

If you want to view attach documents or image file should following step below:

1. Click on Project Name
2. The system will display a window showing all the lot numbers under this project. The table will show the data table as follows
  - a. Quotation No
  - b. Quotation lot No
  - c. Lot No
  - d. Upload Document

Project Folder List				
Show 20 entries <input type="text" value="Search:"/>				
Quotation No.	Quotation lot No.	Lot No.	Upload Document	
Q190900003	Q190900003L1	1	+ New File	
Q190900003	Q190900003L2	2	+ New File	
Q190900003	Q190900003L3	3	+ New File	

3. If you want to view a document or image file can be done by clicking on icon plus (+), the system will display a list of relevant documents, if the document upload from process in system will not be able to delete, but if it is a separate file uploaded it can be delete  
The files that can be delete will show the trash icon in the Action column.

Project Folder List				
Show 20 entries <input type="text" value="Search:"/>				
Quotation No.	Quotation lot No.	Lot No.	Upload Document	
Q190900003	Q190900003L1	1	+ New File	

No	File Name	View File	Action File
1	Final Quotation	<a href="#">View</a>	
2	Final drawing	<a href="#">View</a>	
3	Pay in slip	<a href="#">View</a>	
4	Site survey report	<a href="#">View</a>	
5	Site measure report	<a href="#">View</a>	
6	Floor plan	<a href="#">View</a>	

Project Folder List				
Show 20 entries <input type="text" value="Search:"/>				
Quotation No.	Quotation lot No.	Lot No.	Upload Document	
Q190900003	Q190900003L2	2	+ New File	
Q190900003	Q190900003L3	3	+ New File	

4. If want to upload a new file, do by clicking the New File button. The system will display a box for uploading files. Which can set file names and attach files.  
5. After uploaded file already, System will show file name also you can click view to see detail of file.

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Project Folder List

Show 20 entries

Quotation No.	File Name	Action
Q190900003	1 Final Quotation 2 Final drawing 3 Pay in slip 4 Site survey report 5 Site measure report 6 Floor plan	<a href="#">View</a>
Q190900003	Q190900003L2	<a href="#">+ New File</a>
Q190900003	Q190900003L3	<a href="#">+ New File</a>

Attach Other File

File Name :

Attach file:  No file chosen

[SUBMIT](#) [CANCEL](#)

Upload Document

[+ New File](#)

Action File

**D&W TRAX(production) (Welcome, thanawat@buildersmart.com).admin**

Project Folder List

Show 20 entries

Quotation No.	Quotation lot No.	Lot No.	Action
Q190900003	Q190900003L1	1	<a href="#">+ New File</a>
1 Final Quotation	<a href="#">View</a>		
2 Final drawing	<a href="#">View</a>		
3 Pay in slip	<a href="#">View</a>		
4 Site survey report	<a href="#">View</a>		
5 Site measure report	<a href="#">View</a>		
6 Floor plan	<a href="#">View</a>		
7 Customer File	<a href="#">View</a>		
Q190900003	Q190900003L2	2	<a href="#">+ New File</a>
Q190900003	Q190900003L3	3	<a href="#">+ New File</a>

Showing 1 to 3 of 3 entries

[Previous](#) [1](#) [Next](#)

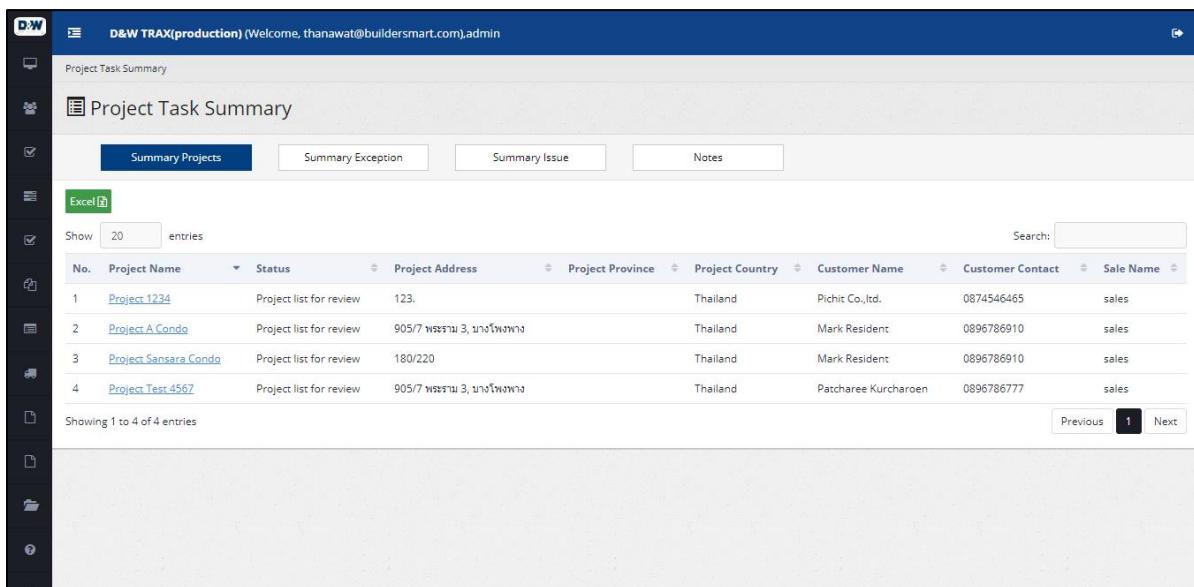
## Project Task Summary

This page for show all data of project, it has 4 tabs as below:

### 1. Summary Project

This tab is for show list of all projects. It has table showing information as below:

- 1.1 No
- 1.2 Project Name
- 1.3 Status
- 1.4 Project Address
- 1.5 Project Province
- 1.6 Project Country
- 1.7 Customer Name
- 1.8 Contact Customer
- 1.9 Sales Name



The screenshot shows a web-based application interface titled "D&W TRAX(production) (Welcome, thanawat@buildersmart.com).admin". The main title is "Project Task Summary". Below the title, there are four tabs: "Summary Projects" (which is selected), "Summary Exception", "Summary Issue", and "Notes". A "Search:" input field is located at the top right of the table area. The table itself has a header row with columns: No., Project Name, Status, Project Address, Project Province, Project Country, Customer Name, Customer Contact, and Sale Name. There are four data rows listed:

No.	Project Name	Status	Project Address	Project Province	Project Country	Customer Name	Customer Contact	Sale Name
1	<a href="#">Project 1234</a>	Project list for review	123.		Thailand	Pichit Co.,Ltd.	0874546465	sales
2	<a href="#">Project A Condo</a>	Project list for review	905/7 พัฒนา 3, บางพลีน้ำเงา		Thailand	Mark Resident	0896786910	sales
3	<a href="#">Project Sansara Condo</a>	Project list for review	180/220		Thailand	Mark Resident	0896786910	sales
4	<a href="#">Project Test 4567</a>	Project list for review	905/7 พัฒนา 3, บางพลีน้ำเงา		Thailand	Patcharee Kurcharoen	0896786777	sales

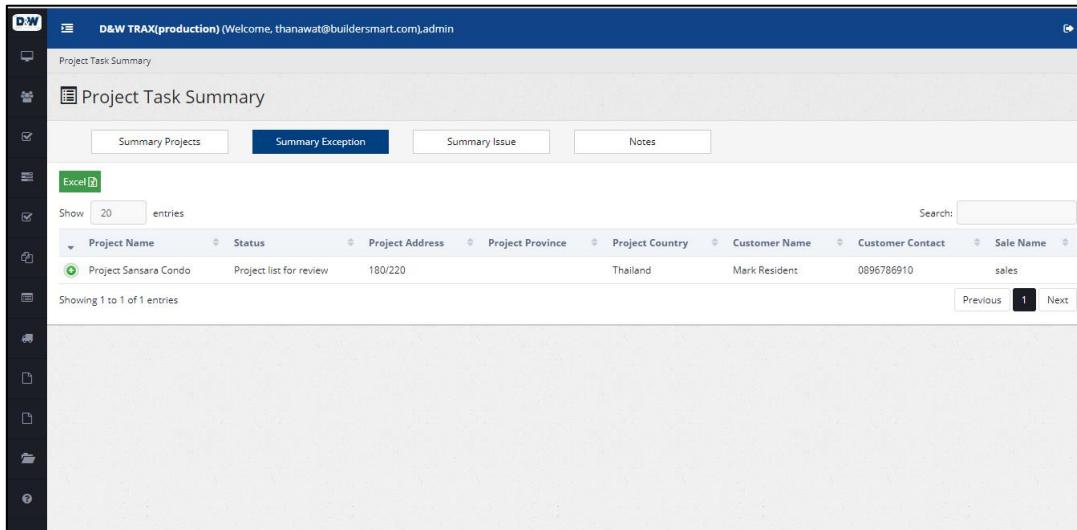
At the bottom left, it says "Showing 1 to 4 of 4 entries". At the bottom right, there are "Previous" and "Next" buttons, with the page number "1" in between.

### 2. Summary Exception

This tab is for show list of all exception. table show information as below:

- 2.1 No
- 2.2 Project Name
- 2.3 Status

- 2.4 Project Address
- 2.5 Project Province
- 2.6 Project Country
- 2.7 Customer Name
- 2.8 Contact Customer
- 2.9 Sales Name



The screenshot shows a web-based application interface for 'Project Task Summary'. At the top, there's a header bar with the application name 'D&W TRAX(production)' and a welcome message '(Welcome, thanawat@buildersmart.com).admin'. Below the header, there's a navigation menu with icons for Home, Projects, Tasks, Issues, and Notes. The main content area is titled 'Project Task Summary' and contains four tabs: 'Summary Projects' (selected), 'Summary Exception' (highlighted in blue), 'Summary Issue', and 'Notes'. A green 'Excel' button is also present. The table below has columns for Project Name, Status, Project Address, Project Province, Project Country, Customer Name, Customer Contact, and Sale Name. One row is visible, showing 'Project Sansara Condo' with status 'Project list for review', address '180/220', province 'Thailand', customer 'Mark Resident', contact '0896786910', and sales 'sales'. The table includes pagination with 'Previous' and 'Next' buttons.

Project Name	Status	Project Address	Project Province	Project Country	Customer Name	Customer Contact	Sale Name
Project Sansara Condo	Project list for review	180/220	Thailand	Mark Resident	0896786910	sales	

Can click push icon (+) before project name for show all exception under this project

### 3. Summary Issue

This tab is for show list of all issue. table show information as below:

- 3.1 No
- 3.2 Project Name
- 3.3 Status
- 3.4 Project Address
- 3.5 Project Province
- 3.6 Project Country
- 3.7 Customer Name
- 3.8 Contact Customer
- 3.9 Sales Name

Can click push icon (+) before project name for show all issue under this project

#### 4. Notes

This tab is for show list of all Notes. table show information as below:

- 4.1 No
- 4.2 Project Name
- 4.3 Status
- 4.4 Project Address
- 4.5 Project Province
- 4.6 Project Country
- 4.7 Customer Name
- 4.8 Contact Customer
- 4.9 Sales Name

The screenshot shows a web-based application interface for 'D&W TRAX(production)'. The title bar displays the application name and the user's email address: 'Welcome, thanawat@buildersmart.com).admin'. The main content area is titled 'Project Task Summary' and contains a table with the following columns: Project Name, Status, Project Address, Project Province, Project Country, Customer Name, Customer Contact, and Sale Name. A green 'Excel' button is located above the table. Below the table, there is a message stating 'No data available in table'. At the bottom left, it says 'Showing 0 to 0 of 0 entries'. Navigation buttons for 'Previous' and 'Next' are at the bottom right. On the far left, there is a vertical sidebar with various icons.

Can click push icon (+) before project name for show all notes under this project

## Finance Confirmation

### Payment Confirmation

This page for Finance and Accounting to confirm Second deposit, Installation Fee and can attach image or document file. In this page has 3 tabs

#### 1. Request Invoiced

This tab show Request invoiced list from sales. table show information as below:

1. No.
2. Req No.
3. Type
4. Project Name
5. Customer Name
6. Submit Date
7. Status
8. Final Quotation
9. Sales Name

The screenshot shows a web-based application interface titled "D&W TRAX(production) (Welcome, thanawat@buildersmart.com).admin". The main title is "Payment Confirmation" and the sub-section is also "Payment Confirmation". There are three tabs at the top: "Request Invoice" (which is active and highlighted in blue), "Product Deposit", and "Installation Fee". Below the tabs is a search bar with placeholder text "Search:" and a dropdown menu set to "Show 20 entries". The main content area contains a table with the following data:

No.	Req. No.	Type.	Project Name	Customer	Submit Date	Status	Final Quotation	Sale Name
1	RF191000001	Second Deposit	Project Sansara Condo	Mark Resident	-	Pending	<a href="#">View</a>	<a href="#">sales</a>
2	RF191000002	Second Deposit	Project Sansara Condo	Mark Resident	-	Pending	<a href="#">View</a>	<a href="#">sales</a>
3	RF191000003	Second Deposit	Project Sansara Condo	Mark Resident	-	Pending	<a href="#">View</a>	<a href="#">sales</a>
4	RF190900001	Second Deposit	Project 1234	Pichit Co.,Ltd.	23-09-2019	Complete	<a href="#">View</a>	<a href="#">sales</a>
5	RF190900002	Second Deposit	Project 1234	Pichit Co.,Ltd.	23-09-2019	Complete	<a href="#">View</a>	<a href="#">sales</a>

Showing 1 to 5 of 5 entries

#### 2. Product Deposit

This page for Finance enters values of second deposit. Second deposit receive by lot. table show information as below:

1. No
2. Request No.
3. Quotation No.
4. Lot No.
5. Project Name

6. Quotation lot amount

7. Receive

- a. Dep 1
- b. Dep 2
- c. Dep 3
- d. Dep 4
- e. Dep 5

8. Balance

No.	Request No.	Quotation No.	Lot No.	Project Name	Quote Lot Amount.	Receive					Balance
						Dep.1	Dep.2	Dep.3	Dep.4	Dep.5	
1	RF19100001	Q19090003	1	Project Sansara Condo	192,230.59	98,037.60					94,192.99
2	RF19100002	Q19090003	2	Project Sansara Condo	391,425.61	199,627.06					191,798.55
3	RF19100003	Q19090003	3	Project Sansara Condo	59,325.35	30,255.93					29,069.42

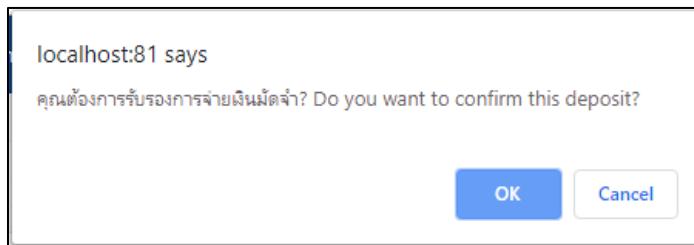
Showing 1 to 3 of 3 entries

The confirmation process is as follows.

1. you will see Quotation, Lot, Project, the collected balance is Dep 1 and the balance that must be keep in the Balance column
2. The amount that has been collected can be entered the Dep 2 column. If the balance is still not equal 0, the process is not completed. Which the finance department can put the next storage amount in the Dep 3 to Dep 5 spaces
3. If balance equal 0 this process will complete
4. If second deposit more than balance system will show alert box ' มีการจ่ายมัดจำเกินกว่ายอดรวมทั้งหมด ! Deposit more than Balance! '



5. After enters values already system will show confirm box 'คุณต้องการรับรองการจ่ายเงินมัดจำ! Do you want to confirm this deposit!'



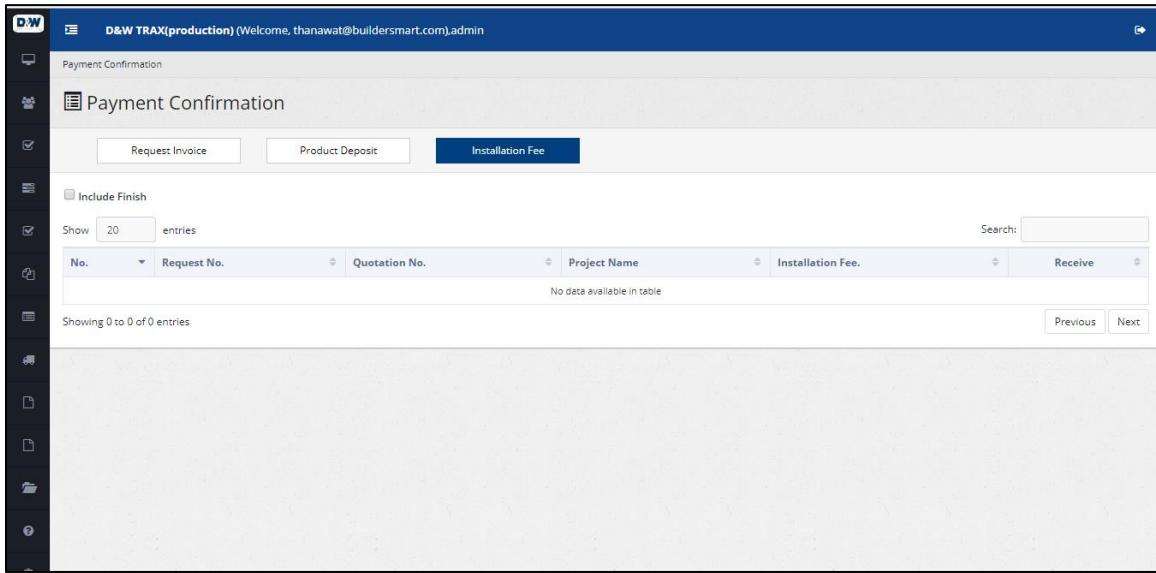
6. If this list complete, the list will hide from table if you want to see this list can check on check box Include Finish.

No.	Request No.	Quotation No.	Lot No.	Project Name	Quote Lot Amount.	Dep.1	Dep.2	Dep.3	Dep.4	Dep.5	Balance
3	RF19100002	Q19090003	2	Project Sansara Condo	391,425.61	199,627.06					191,798.55
5	RF19100003	Q19090003	3	Project Sansara Condo	59,325.35	30,255.93					29,069.42
2	RF19090002	Q19090001	2	Project 1234	5,085.11	2,542.56	2,542.56				-0.00
4	RF19090001	Q19090001	1	Project 1234	11,760.31	5,880.15	5,880.15				0.00
1	RF19100001	Q19090003	1	Project Sansara Condo	192,230.59	98,037.60	94,192.99				0.00

### 3. Installation Fee

This is a table for show the amount of installation fees that must be collected from customers after doing a handover. It will show the information after the sales has requested. In the table will show information follow as

1. No
2. Request No.
3. Quotation No.
4. Project Name
5. Installation Fee
6. Receive



The confirmation process is as follows.

1. you will see Quotation, Project, Total setting amount. And a box for enter balances received
2. The condition of the collection is that the balance must match the total setting fee only, in order to be considered successful.
3. After enter values already system will show confirm box 'คุณต้องการยืนยันยอดค่าติดตั้ง! Do you want to confirm this Installation fee!'
4. if this list complete, this list will hide from table if want to see this list can check on check box Include Finish.

## Invoiced

Is a page for finance department or accounting department. You can attach image files or document files.

### Invoiced Deposit

For attaching images or document files of the Deposit, which will be listed in Lot by form.

1. Quotation No
2. Lot No
3. Project Name
4. Project Address
5. Project Province
6. Project Country
7. Customer Name
8. Contact Customer
9. Sales Name
10. Action

	Quotation No.	Lot No.	Project Name.	Project Address.	Project Province.	Project Country.	Customer Name.	Contact Customer	Sales Name	Action
(1)	Q190900003	1	Project Sansara Condo	180/220		Thailand	Mark Resident	0896786910	sales	(1)
(2)	Q190900003	3	Project Sansara Condo	180/220		Thailand	Mark Resident	0896786910	sales	(1)
(3)	Q190900001	1	Project 1234	123,		Thailand	Pichit Co.,ltd.	0874546465	sales	(1)
(4)	000	1	Project Test 4567	905/7 พัฒนา 3, บางพลีน้ำตก		Thailand	Patcharee Kurcharoen	0896786777	sales	(1)
(5)	Q190900002	2	Project A Condo	905/7 พัฒนา 3, บางพลีน้ำตก		Thailand	Mark Resident	0896786910	sales	(1)
(6)	Q190900001	2	Project 1234	123,		Thailand	Pichit Co.,ltd.	0874546465	sales	(1)
(7)	Q190900002	1	Project A Condo	905/7 พัฒนา 3, บางพลีน้ำตก		Thailand	Mark Resident	0896786910	sales	(1)
(8)	Q190900003	2	Project Sansara Condo	180/220		Thailand	Mark Resident	0896786910	sales	(1)
(9)	000	2	Project Test 4567	905/7 พัฒนา 3, บางพลีน้ำตก		Thailand	Patcharee Kurcharoen	0896786777	sales	(1)

By the process of uploading image files or document files as follows

1. Click on Action column
2. System will display box for attract First Deposit and Second Deposit

Quotation No.	Lot No.	Project Name	Project Address	Project Province	Project Country	Contact Customer	Sales Name	Action
Q190900003	1	Project Sansara	905/7 หมู่ 3, บ้านป่าพะวง	Thailand	Mark Resident	0896786910	sales	(i)
Q190900003	3	Project Sansara	123.	Thailand	Pichit Co.,ltd.	0874546465	sales	(i)
Q190900001	1	Project 1234	905/7 หมู่ 3, บ้านป่าพะวง	Thailand	Mark Resident	0896786910	sales	(i)
000	1	Project Test	180/220	Thailand	Mark Resident	0896786910	sales	(i)
Q190900002	2	Project A Condo	905/7 หมู่ 3, บ้านป่าพะวง	Thailand	Mark Resident	0896786910	sales	(i)
Q190900001	2	Project 1234	123.	Thailand	Pichit Co.,ltd.	0874546465	sales	(i)
Q190900002	1	Project A Condo	905/7 หมู่ 3, บ้านป่าพะวง	Thailand	Mark Resident	0896786910	sales	(i)
Q190900003	2	Project Sansara Condo	180/220	Thailand	Mark Resident	0896786910	sales	(i)
000	2	Project Test 4567	905/7 หมู่ 3, บ้านป่าพะวง	Thailand	Patcharee Kurcharoen	0896786777	sales	(i)

3. After attracting files and click Submit, system will save this file
4. You can view the uploaded document by clicking the + icon in front of the Quotation number and showing the table. There are 2 fields: First Deposit and Second Deposit.
  - a. If have file system show 'View'
  - b. If not have file system show 'No File.'

Quotation No.	Lot No.	Project Name	Project Address	Project Province	Project Country	Customer Name	Contact Customer	Sales Name	Action
Q190900003	1	Project Sansara Condo	180/220	Thailand	Mark Resident	0896786910	sales	(i)	

Invoice First Deposit				Invoice Second Deposit			
View				No File.			
Q190900003	3	Project Sansara Condo	180/220	Thailand	Mark Resident	0896786910	sales
Q190900001	1	Project 1234	123.	Thailand	Pichit Co.,ltd.	0874546465	sales
000	1	Project Test 4567	905/7 หมู่ 3, บ้านป่าพะวง	Thailand	Patcharee Kurcharoen	0896786777	sales
Q190900002	2	Project A Condo	905/7 หมู่ 3, บ้านป่าพะวง	Thailand	Mark Resident	0896786910	sales
Q190900001	2	Project 1234	123.	Thailand	Pichit Co.,ltd.	0874546465	sales
Q190900003	1	Project A Condo	905/7 หมู่ 3, บ้านป่าพะวง	Thailand	Mark Resident	0896786910	sales

## 1. Invoiced Installation

For attaching an image file or a document file of the Installation fee amount, the project list will be shown. The table shows the following information

1. Quotation No
2. Project Name
3. Project Address
4. Project Province
5. Project Country
6. Customer Name
7. Contact Customer
8. Sales Name
9. Action

Quotation No.	Project Name.	Project Address.	Project Province.	Project Country.	Customer Name.	Contact Customer	Sales Name	Action
Q190900001	Project 1234	123.		Thailand	Pichit Co.,Ltd.	0874546465	sales	
Q190900003	Project Sansara Condo	180/220		Thailand	Mark Resident	0896786910	sales	
000	Project Test 4567	905/7 หมู่บ้าน 3, บ้านโพธิ์พานา		Thailand	Patcharree Kurcharoen	0896786777	sales	
Q190900002	Project A Condo	905/7 หมู่บ้าน 3, บ้านโพธิ์พานา		Thailand	Mark Resident	0896786910	sales	

By the process of uploading image files or document files as follows

1. Click on Action column
2. The system will display a box for attaching Installation Fee files.
3. After attracting files and click Submit, system will save this file
4. You can view the uploaded document by clicking the + icon in front of the Quotation number and showing the table.
  - a. If have file system show 'View'
  - b. If not have file system show 'No File.'

## Unallocated Site Measurement

The screenshot shows the 'Unallocated Site Measurement' section of the D&W TRAX application. The main area displays a table with one row of data:

Project name	Project address	Project province	SiteContact name	SiteContact mobile	Sales Person
Project Sansara Condo	180/220	Bangkok			

Below the table, it says 'Showing 1 to 1 of 1 entries'. To the right of the table are 'Previous' and 'Next' buttons, and a green 'Assign' button. To the left of the table is a sidebar with various icons for file management. On the right side of the screen is an 'Activities Calendar - Yomna changsan' for September 2019. The calendar shows dates from 1 to 28. A red box highlights the date 28, which is labeled 'Measurement'.

After Sales has opened the FOC, the system will send information to the Unallocated Site Measurement page so that the Site Manager will assign the job to the Site supervisor.

1. Table for details of each project.
  - a. Project Name
  - b. Project Address
  - c. Project Province
  - d. Site Contract Name
  - e. Site Contact Mobile
  - f. Salesperson
2. Calendar show Site Supervisor job

The process of assignment is as follows

1. Click on icon + before Project Name system will show Lot to do Site Measurement
2. Select Lot
3. Click Assign

After that, the system will display a window to enter data

1. Start date
2. Finish date
3. Start time
4. Finish time
5. Select Site Supervisor

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Unallocated Site Measurement

**Unallocated**      **Assigned**

Show 20 entries Search:

Project name	Project address	Project province	SiteContact name	SiteContact mobile	Sales Person
Project Sansara Condo	180/220	Bangkok			
FOC No.	Quotation No.	Quotation Lot No.	Lot No.	Expected Site Measurement.	Select
FOC2019090002	Q190900003	Q190900003L1	1	04-10-2019	<input checked="" type="checkbox"/>
FOC2019090002	Q190900003	Q190900003L2	2	04-10-2019	<input checked="" type="checkbox"/>

Showing 1 to 1 of 1 entries Previous 1 Next Assign

Activities Calendar - Yomna changsan

< > today month week day SEPTEMBER 2019

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

Measurement

Activities Calendar - Chettha changsan

Show 20 entries Search:

Assign Team

< > today SEPTEMBER 2019 month week day

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

Project Name : Project Sansara Condo

Address : 180/220

Subject : Measurement

Description :

Start Date : dd-mm-yyyy 8:30 AM

End Date : dd-mm-yyyy 5:30 PM

Assign To : Yomna changsan

Save Cancel

## Site Measurement

This page for site supervisor to see site measurement job.

1. Project Name
2. Status
3. Start Date
4. Finish Date
5. Project Address
6. Project Province
7. Site Contract Name
8. Site Contact Mobile
9. Assign To
10. Salesperson

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Site Measurement List

Site Measurement List

Measurement

Show 20 entries

Search:

Project name	Status	Start Date	Finish Date	Project address	Project province	SiteContact name	SiteContact mobile	Assign To	Sales Person	Measurement
Project Sansara Condo	Not Start	2019-10-04	2019-10-04	180/220	Bangkok	Yomna changsan	sales			Measurement

Showing 1 to 1 of 1 entries

Previous 1 Next

If you want to do Site Measurement. Click **Measurement** button, system will show page for do Site Measurement

**Site Measurement Page (Top Screenshot):**

Project Name: Project Sansara Condo  
 Address: 180/220  
 Customer Name: Mark Resident  
 Contact Name: test  
 Contact Type: Secretary  
 Contact Phone: 0896786910  
 Contact Mobile: 0852218422  
 Contact Email: mail@buildersmart.com

**Create Site Measurement Report Page (Bottom Screenshot):**

Lot 1 Expect Delivery Date from Sales : 09-10-2019  
 Can the product be delivered Lot 1 on the expected date? :  Yes  No

Lot 2 Expect Delivery Date from Sales : 10-10-2019  
 Can the product be delivered Lot 2 on the expected date? :  Yes  No

Have any change effect to cost:

System will display the information have 3 parts

1. Project part
  - a. Project name
  - b. Quotation number
  - c. Project address
  - d. County
  - e. Customer name
  - f. Sales name

2. Contact section
  - a. can add contact information of that project by clicking on add contact information. Enter contact information and press the save button. If you want to delete, you can delete by pressing the trash button to delete that contact's information.
3. The section for adding Site Measurement data, with the following information
  - a. Box for attach Site Measurement report
  - b. Box for answer question 'สามารถส่งของตามวันที่คาดการณ์ได้หรือไม่'
  - c. Checkbox for check. If any changes affect the cost or not?
  - d. Box for entering detail \*\* If clicked to select if any changes are affecting the cost or not the system will display a box for entering change information.
  - e. Box for attach file \*\* If clicked to select if any changes are affecting the cost or not the system will display a box for entering change information.
  - f. Save button
  - g. Save and Send button

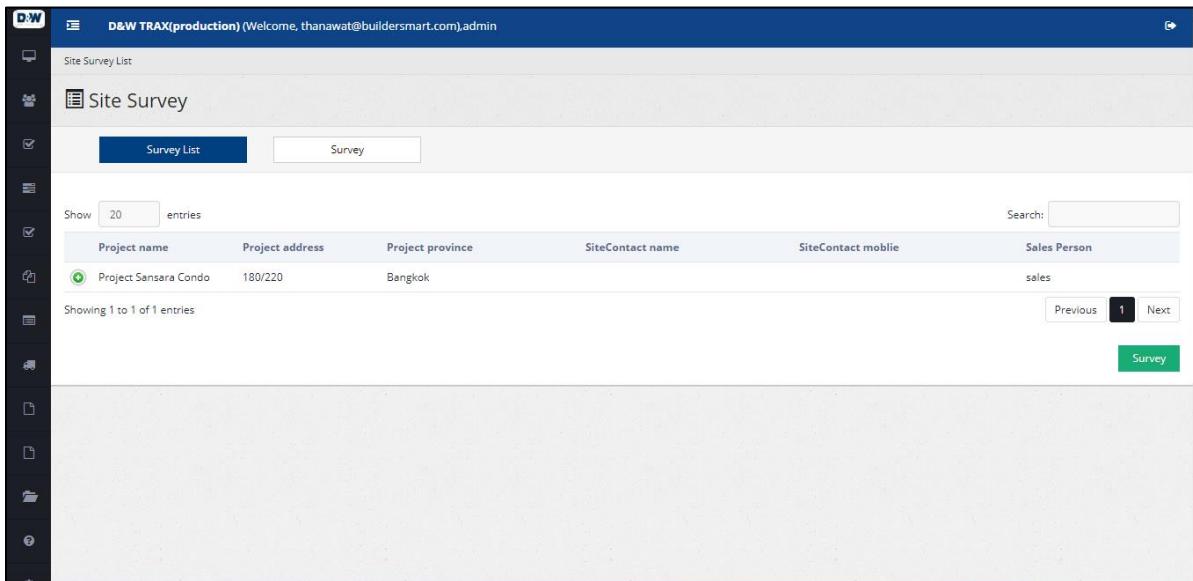
The difference between the Save button and the Save and Send button is

1. If click Save button, system will save your information in system and still not finished. Status will be In Progress.
2. If click "Save and Send" button, system will save and consider that the Site Measurement is complete. Status will change to Complete.

After the Site Measurement finish, the system will notify Sales and Planner for production.

Project name	Status	Start Date	Finish Date	Project address	Project province	SiteContact name	SiteContact mobile	Assign To	Sales Person	Measurement
Project Sansara Condo	Complete	2019-10-04	2019-10-04	180/220 Bangpongpong Yannawa	Bangkok	Yomna changsan	sales		sales	<a href="#">View</a>

## Site Survey

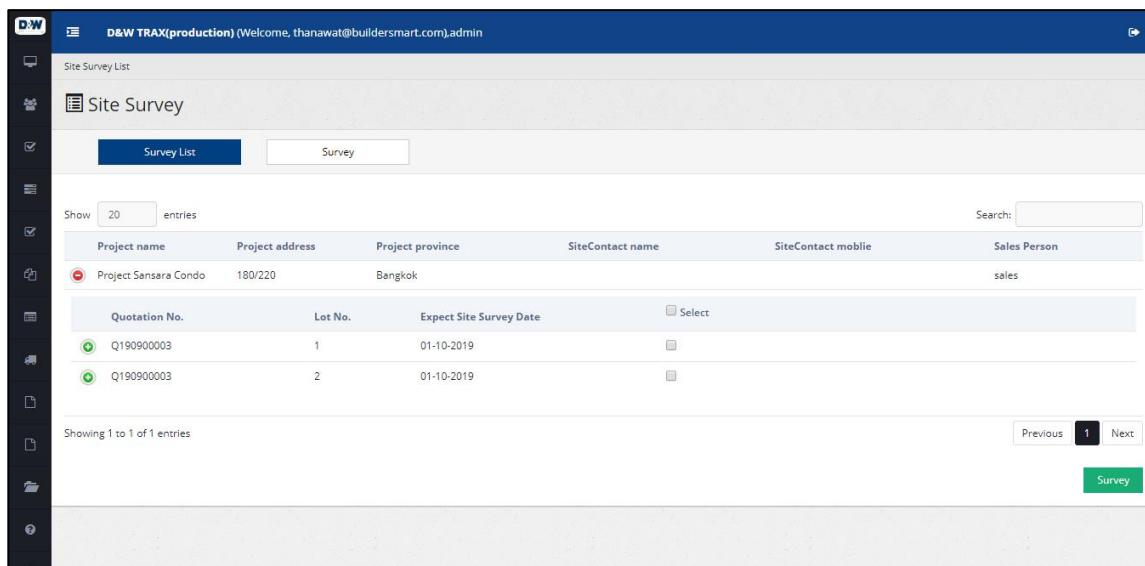


The screenshot shows a web-based application interface for managing site surveys. The top navigation bar indicates the user is logged in as 'D&W TRAX(production) (Welcome, thanawat@buildersmart.com).admin'. The main title is 'Site Survey' with tabs for 'Survey List' and 'Survey'. A search bar and a 'Show 20 entries' button are present. The data table has columns: Project name, Project address, Project province, SiteContact name, SiteContact mobile, and Sales Person. One entry is listed: 'Project Sansara Condo' with address '180/220' and province 'Bangkok'. The contact information is 'SiteContact name: sales'. Navigation buttons for 'Previous', '1', and 'Next' are shown, along with a green 'Survey' button at the bottom right.

After Pipeline is moved to the Status FOC Almost Submit, the system will show that project on the Site Survey page. Planner will see the project details that the Planner is responsible. The system will display the following details

1. Project Name
2. Project address
3. Project Province
4. Site contact Name
5. Site contact Mobile
6. Sale Person

Planner can select lot to do Site Survey. Click the + button in front of Project Name. The system will display all the Lot under that Project.



This screenshot shows the same 'Site Survey List' page as above, but with additional data for the first project entry. A new column 'Quotation No.' has been added to the table. Under 'Quotation No.', two entries are listed: 'Q190900003' and 'Q190900003'. Each entry has a corresponding 'Lot No.' (1 and 2) and an 'Expect Site Survey Date' (01-10-2019). There is also a 'Select' checkbox next to each row. The rest of the page structure remains the same, including the search bar, pagination, and 'Survey' button.

Project name	Project address	Project province	SiteContact name	SiteContact mobile	Sales Person
Project Sansara Condo	180/220	Bangkok			sales

Quotation No.	Lot No.	Expect Site Survey Date	Select
Q190900003	1	01-10-2019	<input checked="" type="checkbox"/>
Q190900003	2	01-10-2019	<input checked="" type="checkbox"/>

Showing 1 to 1 of 1 entries

Previous [1] Next

**Survey**

And after select Lot to do Site Survey, click Survey button at the button. The system will display a window to view the data details and the fields for you to enter data.

The system will display the information have 3 parts

4. Project part
  - a. Project name
  - b. Quotation no
  - c. Project address
  - d. County
  - e. Customer address
  - f. Salesperson
5. Contact section
  - a. can add contact information of that project by clicking on add contact information. Enter contact information and press the save button. If you want to delete, you can delete by pressing the trash button to delete that contact's information.
6. The section for adding Site Measurement data, with the following information
  - a. Box for attach Site Measurement report
  - b. Box for answer question 'สามารถส่งของตามวันที่คาดการณ์ได้หรือไม่'
  - c. Checkbox for check. If any changes affect the cost or not?

- d. Box for entering detail \*\* If clicked to select if any changes are affecting the cost or not the system will display a box for entering change information.
- e. Box for attach file \*\* If clicked to select if any changes are affecting the cost or not the system will display a box for entering change information.
- f. Save button
- g. Save and Send button

The difference between the Save button and the Save and Send button is

3. If click Save button, the system will save the information first. But is still not finished. Status will be In Progress.
4. If click "Save and Send" button, the system will save and consider that the Site Measurement is complete. Status will change to Complete.

**Site Survey Page Screenshot:**

Project detail : Project Sansara Condo

ชื่อโครงการ Project Name	Project Sansara Condo	เลขใบเสนอราคา Quotation Number	Q190900003L1 Q190900003L2		
ที่อยู่ Address	180/220 Bangpongpong Yannawa	ประเทศไทย Country	Thailand		
ชื่อลูกค้า Customer Name	Mark Resident	หัวหน้าผู้ดูแล Sales Person	sales		
ชื่อผู้ติดต่อ ContactName	ผู้管束 Contact Type	เบอร์โทรศัพท์ ContactPhone	เบอร์มือถือผู้ติดต่อ ContactMobile	อีเมลผู้ติดต่อ ContactEmail	แก้ไข/ลบ Edit/Delete
test	Secretary	0896786910	0852218422	mail@buildersmart.com	

**Create Site Survey Report Page Screenshot:**

Site Survey Report :

Final Measurement

ล็อต 1 - คาดการณ์วันส่งสินค้า ในวันที่  
Lot 1 - Expect Delivery Date : 09-10-2019

\*สามารถส่งสินค้า ล็อต 1 ตามวันที่คาดการณ์ได้หรือไม่  
Can the product be delivered Lot 1 on the expect date? :  Yes  No

ล็อต 2 - คาดการณ์วันส่งสินค้า ในวันที่  
Lot 2 - Expect Delivery Date : 10-10-2019

\*สามารถส่งสินค้า ล็อต 2 ตามวันที่คาดการณ์ได้หรือไม่  
Can the product be delivered Lot 2 on the expect date? :  Yes  No

มีการเปลี่ยนแปลงอะไรที่ส่งผลต่อต้นทุนหรือไม่  
 Have any change effect to cost:

**Buttons:**

- Save
- Save and Send

มีการเปลี่ยนแปลงของราคานี้ส่งผลต่อจำนวนเงิน

Have any change effect to cost :

Issue Remark :

Issue File:

No file chosen

^

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Site Survey List

### Site Survey

	<input type="button" value="Survey List"/>	<input type="button" value="Survey"/>							
Show	20	entries							
Project name	Status	Start Date	Finish Date	Project address	Project province	SiteContact name	SiteContact mobile	Sales Person	Site Survey
Project 1234	Complete	23-09-2019	23-09-2019	123.	Bangkok			sales	<input type="button" value="Survey"/>
Project A Condo	Complete	26-09-2019	26-09-2019	905/7 พระราม 3, บางโพงพาง	Bangkok			sales	<input type="button" value="Survey"/>
Project Sansara Condo	Complete	30-09-2019	30-09-2019	180/220	Bangkok			sales	<input type="button" value="Survey"/>

Showing 1 to 3 of 3 entries

Previous  Next

## Site Expect Delivery

This page for Site Manager that can view and change the expect delivery date of delivery of each lot by showing the following information

1. No
2. Quote No
3. Project Name
4. Customer Name
5. Status
6. Expected Delivery Values (Sales)
7. Expected Delivery Date (Sales)
8. Expected Delivery Date (Site)
9. Sales
10. Action

No.	Quote No.	Project Name.	Customer Name.	Status	Expected Delivery Value (Sales)	Expected Delivery Date (Sales)	Expected Delivery Date (Site Manager)	Sales	Action
1	Q190900001L2	Project 1234	Pichit Co.,ltd.	Production	200000.00	05-10-2019	05-10-2019	sales	
2	Q190900003L1	Project Sansara Condo	Mark Resident	Production	-35444.25	09-10-2019	09-10-2019	sales	
3	Q190900003L2	Project Sansara Condo	Mark Resident	Production	20000.00	10-10-2019	10-10-2019	sales	
4	Q190900003L3	Project Sansara Condo	Mark Resident	Production	55444.25	13-11-2019	13-11-2019	sales	

The change process is as follows

1. Click Action column
2. In Expected Delivery Date (Site) column will show box for put date
3. Click save icon. The system will save the new date.

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Site Expect List

**Site Expect List**

Show 20 entries Search:

No.	Quote No.	Project Name.	Customer Name.	Status	Expected Deivery Value (Sales)	Expected Deivery Date (Sales)	Expected Deivery Date (Site Manager)	Sales	Action
1	Q190900001L2	Project 1234	Pichit Co.,ltd.	Production	200000.00	05-10-2019	05-10-2019	sales	
2	Q190900003L1	Project Sansara Condo	Mark Resident	Production	-35444.25	09-10-2019	09-10-2019	sales	
3	Q190900003L2	Project Sansara Condo	Mark Resident	Production	20000.00	10-10-2019	10-10-2019	sales	
4	Q190900003L3	Project Sansara Condo	Mark Resident	Production	55444.25	13-11-2019	13-11-2019	sales	

Showing 1 to 4 of 4 entries Previous 1 Next

## Site Confirmation

This page for Site Manager to confirms Site is ready Site Manager The steps to be confirmed are as follows

1. Click Confirm button in Confirm Delivery Date column

But if not ready to receive the product Can change the delivery date When the date has been changed, the system will notify the Sales and Logistic to acknowledge the following steps.

1. Click Change button in Change Delivery Date column
2. Enter new date
3. Click submit

Show	20	entries	Search:			
Quotation No.	Project Name	Customer Name	Expect Delivery Date	Finance Confirmation	Confirm Delivery Date	Change Delivery Date
Q190900003L1	Project Sansara Condo	Mark Resident	09-10-2019	No	<button>Confirm</button>	<button>Change</button>
Q190900003L3	Project Sansara Condo	Mark Resident	13-11-2019	No	<button>Confirm</button>	<button>Change</button>
Q190900003L2	Project Sansara Condo	Mark Resident	10-10-2019	No	<button>Confirm</button>	<button>Change</button>
Q190900001L2	Project 1234	Pichit Co.,ltd.	05-10-2019	Yes	<button>Confirmed</button>	<button>Confirmed</button>

Showing 1 to 4 of 4 entries

Previous 1 Next

Show	20	entries	Search:			
Quotation No.	Project Name	Customer Name	Expect Delivery Date	Finance Confirmation	Confirm Delivery Date	Change Delivery Date
Q190900003L3	Project Sansara Condo	Mark Resident	New delivery date		<button>Confirm</button>	<button>Change</button>
Q190900003L2	Project Sansara Condo	Mark Resident			<button>Confirm</button>	<button>Change</button>
Q190900003L1	Project Sansara Condo	Mark Resident			<button>Confirmed</button>	<button>Confirmed</button>
Q190900001L2	Project 1234	Pichit Co.,ltd.			<button>Confirmed</button>	<button>Confirmed</button>

Showing 1 to 4 of 4 entries

Previous 1 Next

## Site report

This page for Site Manager Can see a list of assignments to Site Supervisor With the following information

1. Header Is a section for filtering to view by month, year, or by site supervisor
2. The data table Will display the following information
  - a. No
  - b. Project Name
  - c. Measurement Date
  - d. Assign To
  - e. Status

The screenshot shows a web-based application interface for a 'Site Project Report'. At the top, there are navigation links: Home > Site Project Report. Below this is a search/filter section with dropdowns for 'Month' and 'Year', and a dropdown for 'Select Site Person' followed by a 'Search' button. A table below displays one row of data:

No.	Project Name	Measurement Date	Assign To	Status
1	Project Sansara Condo	04-10-2019	Yomna changsan	complete

At the bottom of the table, it says 'Showing 1 to 1 of 1 entries'. There are also 'Previous' and 'Next' buttons.

## Unallocated Installation and Plan

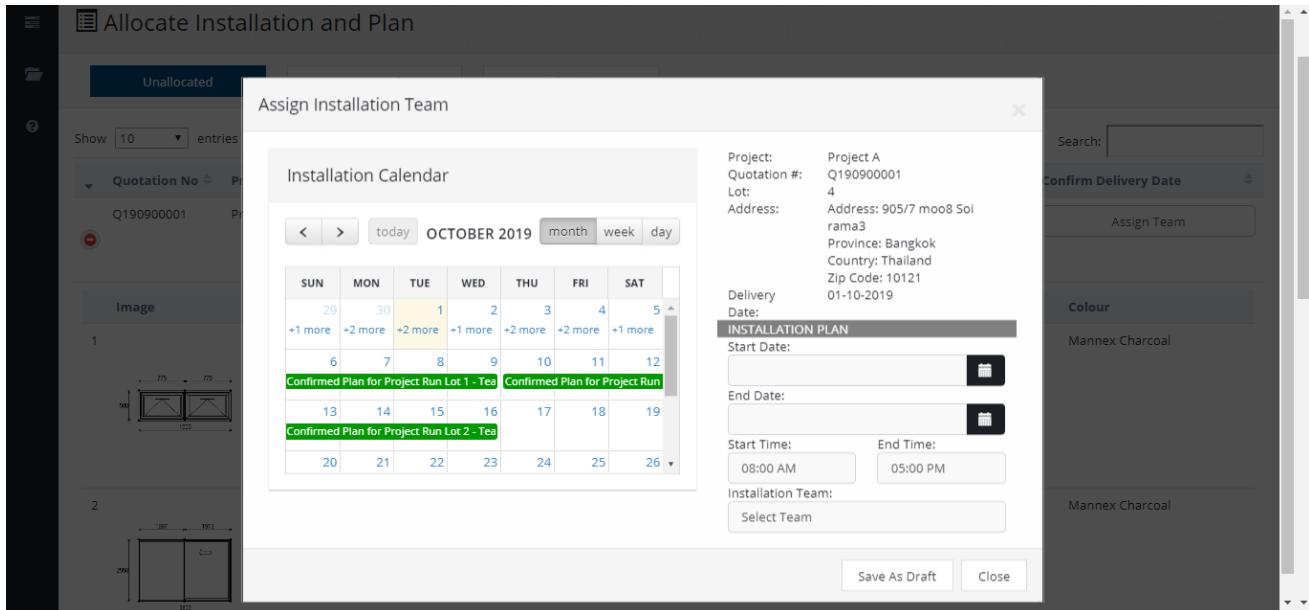
- I. Unallocated Installation and Plan – This is a Site Manager's page to make plans for installation and allocate team to the plan. Go to Site Services -> Unallocated Installation and Plan menu to access this function. There are 3 Tabs in this page, Unallocated, Assigned, Schedule.
  - a. Unallocated – This page contains all the projects that already has confirmed delivery date.

Allocate Installation and Plan						
	Allocate Installation and Plan					
	Unallocated		Assigned		Schedule	
Show	10	entries	Search:			
Quotation No	Project Name	Lot No	Customer	Address	Delivery Date	Confirm Delivery Date
Q190900012	Project Run	2	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	08-10-2019	<button>Assign Team</button>
Q190900001	Project A	4	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	01-10-2019	<button>Assign Team</button>
Q190900002	Project IT	1	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	30-09-2019	<button>Assign Team</button>
Q190900002	Project IT	2	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand	30-09-2019	<button>Assign Team</button>

- i. View Lot Items – Click on the plus (+) button to view the items under the lot.

Allocate Installation and Plan						
	Allocate Installation and Plan					
	Unallocated		Assigned		Schedule	
Show	10	entries	Search:			
Quotation No	Project Name	Lot No	Customer	Address	Delivery Date	Confirm Delivery Date
Q190900001	Project A	4	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	01-10-2019	<button>Assign Team</button>
Image	Item Code	Item Name	Description	Width	Height	Colour
1	W5	W5-1	Awning Window	1,550	500	Mannex Charcoal
2	D2	D2-3	OX Euroslider Door	3,800	2,550	Mannex Charcoal

- ii. Assign Team – To assign installation team to the project, click on Assign Team button and the pop-up page will show. Provide all the necessary details and save the plan. The plan will appear as “Draft Plan” in the Schedule.

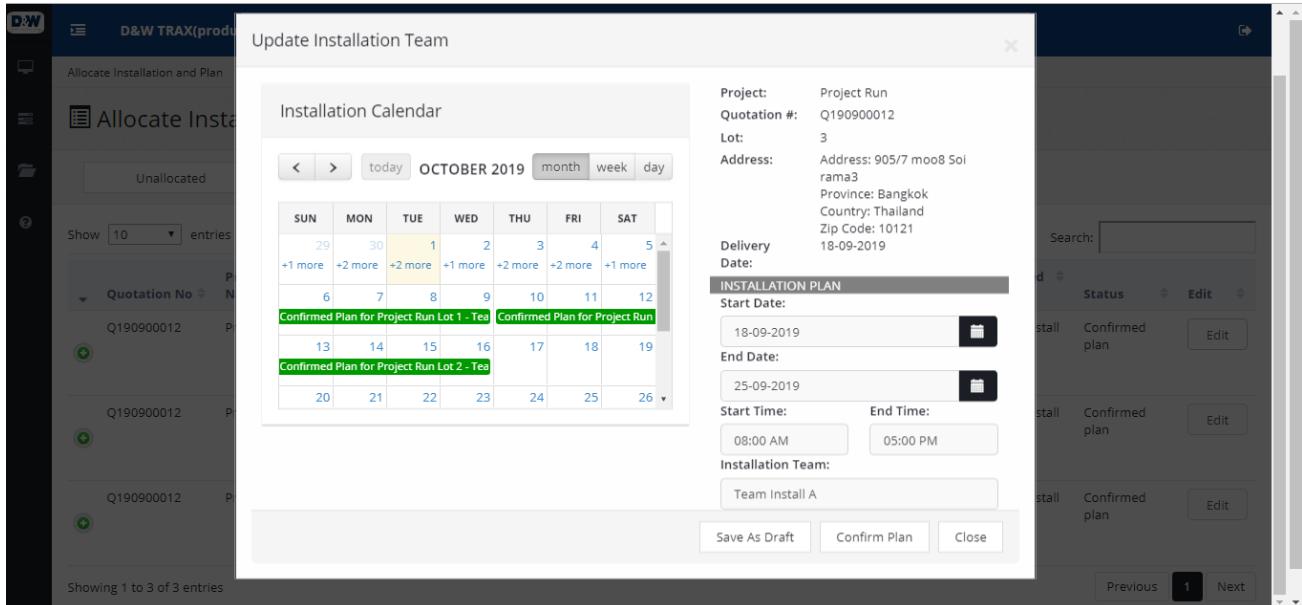


- b. Assigned – This page contains all the Lots that were already planned. In this page can be done the updating or confirming of the plan.

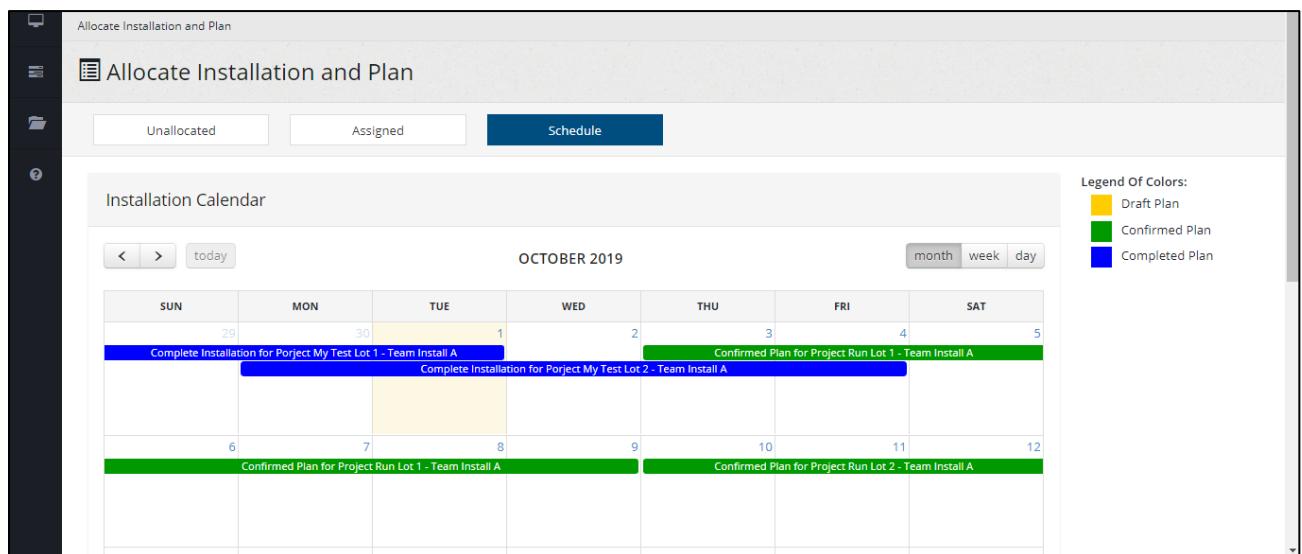
Allocate Installation and Plan										
Allocate Installation and Plan			Schedule							
Unallocated		Assigned								
Quotation No	Project Name	Lot No	Customer	Address	Installation Date	Start Date	End Date	Assigned To	Status	Edit
Q19090012	Project Run	3	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	18-09-2019	18-09-2019	25-09-2019	Team Install A	Confirmed plan	<button>Edit</button>
Q19090012	Project Run	2	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	08-10-2019	10-10-2019	17-10-2019	Team Install A	Confirmed plan	<button>Edit</button>
Q19090012	Project Run	1	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	03-10-2019	03-10-2019	10-10-2019	Team Install A	Confirmed plan	<button>Edit</button>

i. Update / Confirm Plan –

1. To update: Provide necessary details and click “Save As Draft” button.
2. To confirm: Click on “Confirm Plan” button.



- c. Schedule – This page contains the calendar of the Installation. The schedules are color coded depending on the type of the plan: Draft Plan, Confirmed Plan, Completed Plan.



## Installation

- I. Installation – This page is where Installation job will be monitored. Go to Site Services -> Installation menu to access this function. There are 4 Tabs in this function: Receive Order, Receive Exception, Installation and Complete.

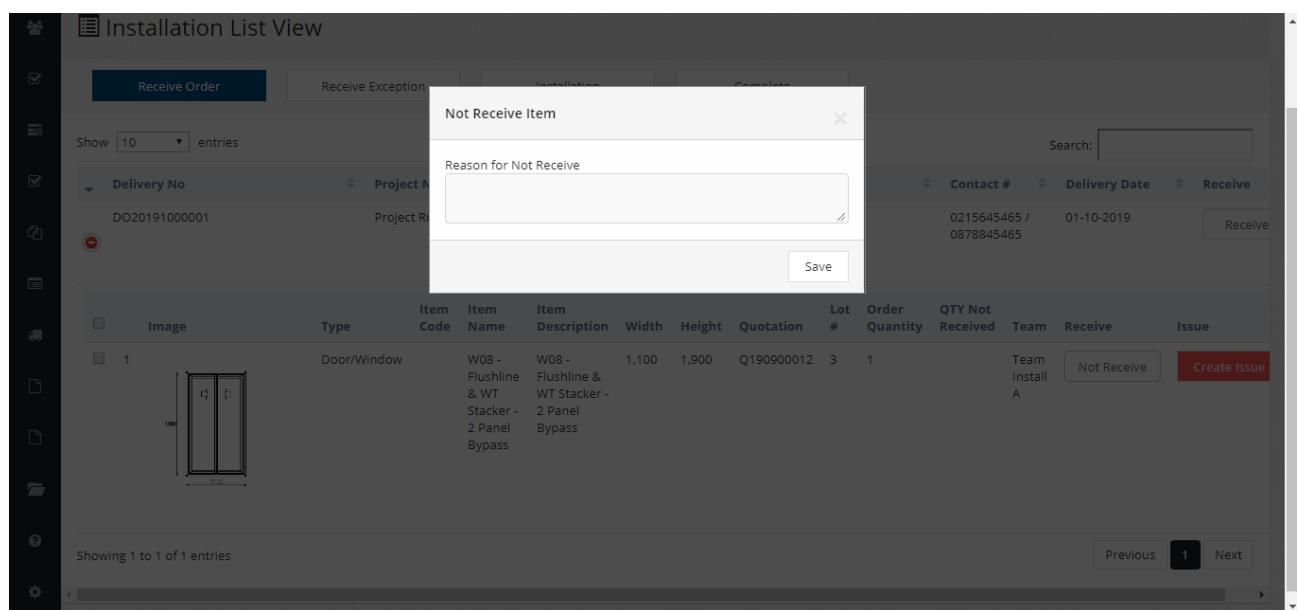
- a. Receive Order

The screenshot shows the 'Installation List View' page. At the top, there are four tabs: 'Receive Order' (highlighted in blue), 'Receive Exception', 'Installation', and 'Complete'. Below the tabs, there is a search bar and a table with one entry. The table columns include Delivery No, Project Name, Customer, Address, Contact #, Delivery Date, and a 'Receive' button. The entry details are: DO20191000001, Project Run, Naphak Sooklon, Address: 180/220 Yannawa Yannawa, Province: Bangkok, Country: Thailand, Zip Code: 10210. The 'Receive' button is highlighted with a red box.

- i. To View Items – Click on the plus (+) button.

The screenshot shows the 'Installation List View' page with an expanded view of the items. The table now includes a new row under the 'Image' column for the first item, showing a diagram of a double door. The expanded row contains columns for Item Code, Item Name, Item Description, Width, Height, Quotation, Lot #, Order Quantity, QTY Not Received, Team, Receive, and Issue. The 'Receive' button is highlighted with a red box. The 'Create Issue' button is also visible in the same row.

- ii. To Receive Items – Select items to receive by checking the checkbox corresponding to the item and click on Receive button. After items are received, items will go to Installation Tab.
- iii. To Not Receive Item – Click “Not Receive” button corresponding to the item. Reason must be provided for not receiving the item. This function will send an email to Site Manager informing of the item not received.



- iv. Create Issue – If an item has issue, click on the “Create Issue” button and it will redirect to Issue Tracking function.
- b. Receive Exception – This page will show exceptions that were delivered. After receiving exceptions, system will mark item/s as delivered, it doesn't show in the Installation tab.
- c. Installation – In this page, the Site Supervisor can update the status of the Installation Job.
  - i. Finish – The Site Supervisor can select multiple items to mark as Finish or can do one at a time.

- ii. Create Issue – If item has issue during Installation, click on the Create Issue button.
- iii. Complete – When all items are finished, the Finish button will change into Complete button. Click on the Complete button to complete the Job.

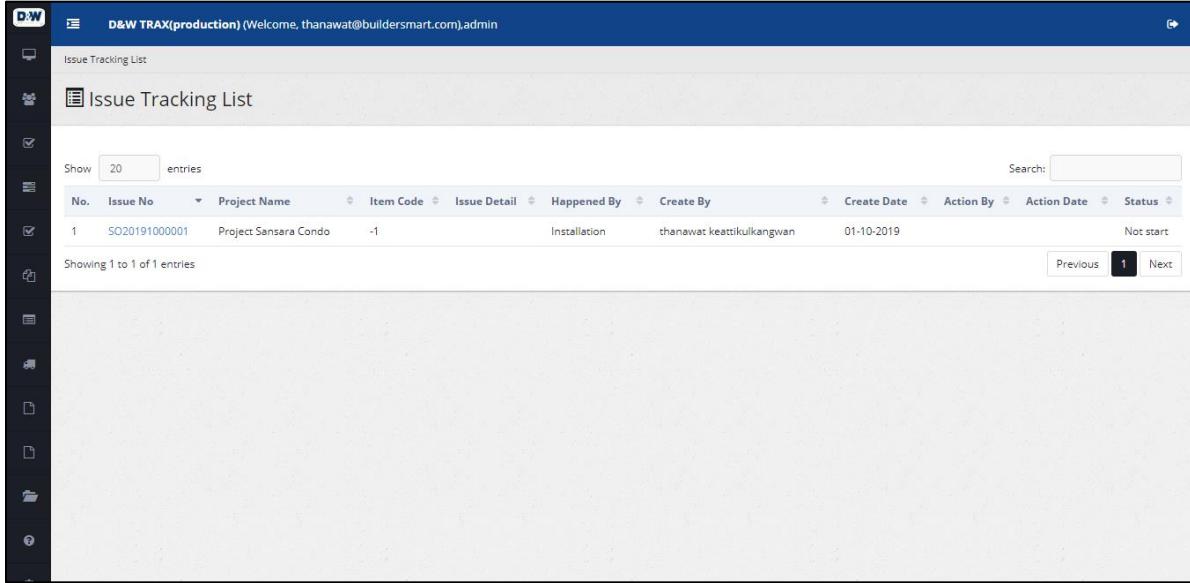
Delivery No	Project Name	Customer	Address	Contact #	Delivery Date	Start Date	End Date	Team	Action
DO2019100001	Project Run	Naphak Sooklon	Address: 180/220 Yannawa Yannawa Province: Bangkok Country: Thailand Zip Code: 10210	0215645465 / 0878845465	01-10-2019	18-09-2019	25-09-2019	Team Install A	<button>Finish</button>

- d. Complete – This page will show all the Installation Jobs that were already completed.

Delivery No	Project Name	Customer	Address	Contact #	Delivery Date	Start Date	End Date	Team	Status
DO2019090002	Project My Test	Naphak Sooklon	Address: 182/20 Bangpong pang Yannawa Province: Bangkok Country: Thailand Zip Code: 10120	0215645465 / 0878845465	20-09-2019	30-09-2019	05-10-2019	460461f8bf	Complete
DO2019090001	Project My Test	Naphak Sooklon	Address: 182/20 Bangpong pang Yannawa Province: Bangkok Country: Thailand Zip Code: 10120	0215645465 / 0878845465	19-09-2019	25-09-2019	02-10-2019	460461f8bf	Complete

## Issue Tracking

For the site, you can see a list of all Issue Tracking created, and you can see the status. If there is a change, the details of the change can be seen by



The screenshot shows the 'Issue Tracking List' page of the D&W TRAX(production) application. The header displays the application name and the user's email address. The main content area is titled 'Issue Tracking List' and contains a table with one entry. The table columns are: No., Issue No., Project Name, Item Code, Issue Detail, Happened By, Create By, Create Date, Action By, Action Date, and Status. The single entry is as follows:

No.	Issue No.	Project Name	Item Code	Issue Detail	Happened By	Create By	Create Date	Action By	Action Date	Status
1	SO2019100001	Project Sansara Condo	-1		Installation	thanawat keattikulangwan	01-10-2019			Not start

Below the table, a message indicates 'Showing 1 to 1 of 1 entries'. At the bottom right, there are navigation buttons for 'Previous', '1' (highlighted), and 'Next'.

1. Click on Issue No. The system will show the data table which Site opens which is Issue Informaiton.
2. The information which the Planner specifies the solution is in the Action Information section.

## Handover

- II. Handover – This page contains all the projects that are ready to be handed over to customer. Go to Site Services -> Handover menu to access to function. There are 2 tabs in this function: Project List and Handover List.

Project Name	Customer Name	Address	Contact	Handover
Project My Test	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	0215645465 / 0878845465	<input type="button" value="Create Handover"/>
Project Run	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	0215645465 / 0878845465	<input type="button" value="Create Handover"/>

- a. Project List – In the Project List page, the quotation lots that has already finished installation will show under each Project.
- i. To view the items under the Lot, click on the plus (+) button.
  - ii. To create the Handover, select the quotation lots that you want to include in the handover document by clicking on the checkbox corresponding to the lot, then click “Create Handover” button.

Quotation No	Lot No	Installation Status	Complete Date
Q190900009	1	Complete	19-09-2019
Q190900009	2	Complete	20-09-2019

- iii. Handover Document – After clicking Create Handover button, it will redirect to this page to create the handover document. Verify the details of the handover document and click on Create Handover button.

Hand-over Acceptance Form

**Hand-over Acceptance Form**

**Create Handover**

**D&W**  
D & W (ASIA) LTD.

Hand Over Acceptance Form

Date: 03-10-2019

Subject: Handover Projects  
To: Valued Customer / Project Manager  
Job Project My Test - Q19090009

Reference Documents  
Q19090009 - 1 Date: 17-09-2019

- b. Handover List – This page contains all the handover created.

Handover List View

**Handover List View**

**Project List** **Handover List**

Show 10 entries Search:

#	Handover No	Handover Date	Project Name	Customer Name	Address	Contact	Status	Action
1	HO2019100001	03-10-2019	Porject My Test	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: 3528 Country: 217 Zip Code: 10121	0215645465 / 0878845465	Open	Select Status
2	HO2019090003	27-09-2019	Porject My Test	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: 3528 Country: 217 Zip Code: 10121	0215645465 / 0878845465	Closed	
3	HO2019090002	27-09-2019	Porject My Test	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: 3528 Country: 217 Zip Code: 10121	0215645465 / 0878845465	Cancelled	
4	HO2019090001	23-09-2019	Porject My Test	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: 3528 Country: 217	0215645465 / 0878845465	Cancelled	

- i. To update status of the handover – select status in the action dropdown.
  - ii. To View the items in handover – click on the plus (+) button.

Handover List View											
Project List		Handover List									
Show <select>10</select> entries <input placeholder="Search:" type="text"/> <span style="float: right;">Select Status</span>											
#	Handover No	Handover Date	Project Name	Customer Name	Address	Contact	Status	Action			
1	HO2019100001	03-10-2019	Porject My Test	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: 3528 Country: 217 Zip Code: 10121	0215645465 / 0878845465	Open	Select Status			
Image	Quotation Number	Lot Number	Item Code	Item Series	Item Name	Item Description	Height (mm)	Width (mm)	Colour	Price	Issue
	Q190900009	2	WD01	Awning Frame	WD01-1	Fixed Light	2,800	1,200	Appliance White Matt	618.01	<a href="#">Create Issue</a>
	Q190900009	2	WD01	Awning Frame	WD01-2	Fixed Light	2,800	1,200	Appliance White Matt	618.01	<a href="#">Create Issue</a>

- iii. To create issue – click on the Create Issue button.
  - iv. To view the handover document – click on the handover number link.

Handover Acceptance Form

## Handover Acceptance Form

Project List      Handover List

Sign      Print to PDF



D&W (ASIA) LTD.

Handover Acceptance Form

Date: 03-10-2019

Subject: Handover Projects

To: Valued Customer / Project Manager

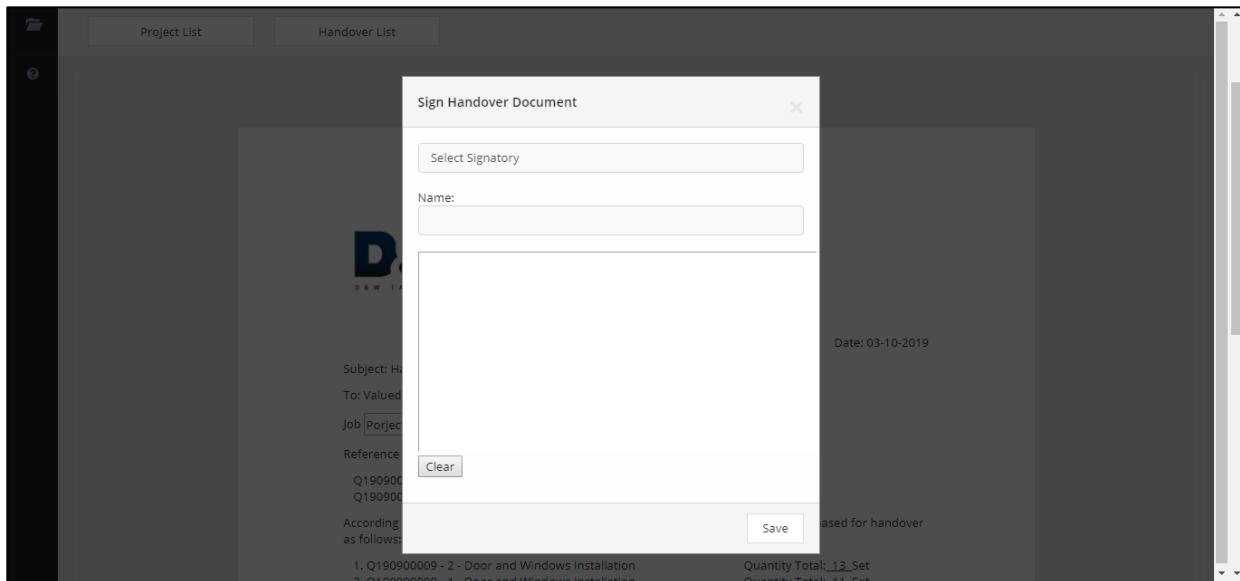
Job

Reference Documents

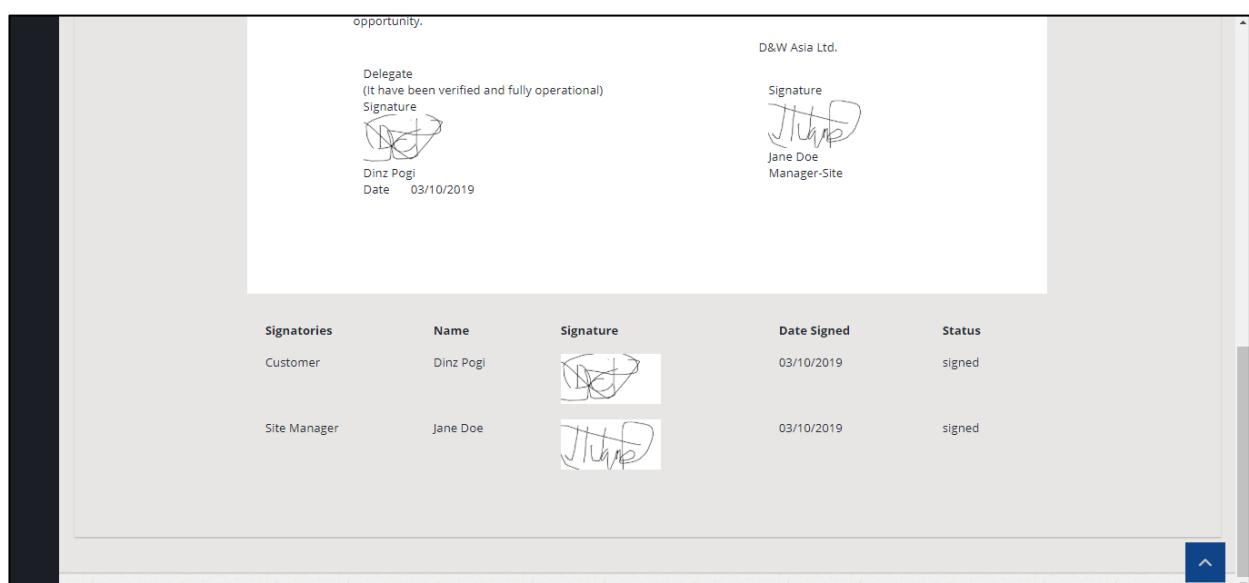
Q190900009 - 2      Date: 17-09-2019

v. To sign handover document –

1. Select the signatory
2. Enter the name
3. Provide signature
4. Save



vi. To view signature –



vii. Print the PDF file



viii. To cancel handover – select Cancel Handover in the action column

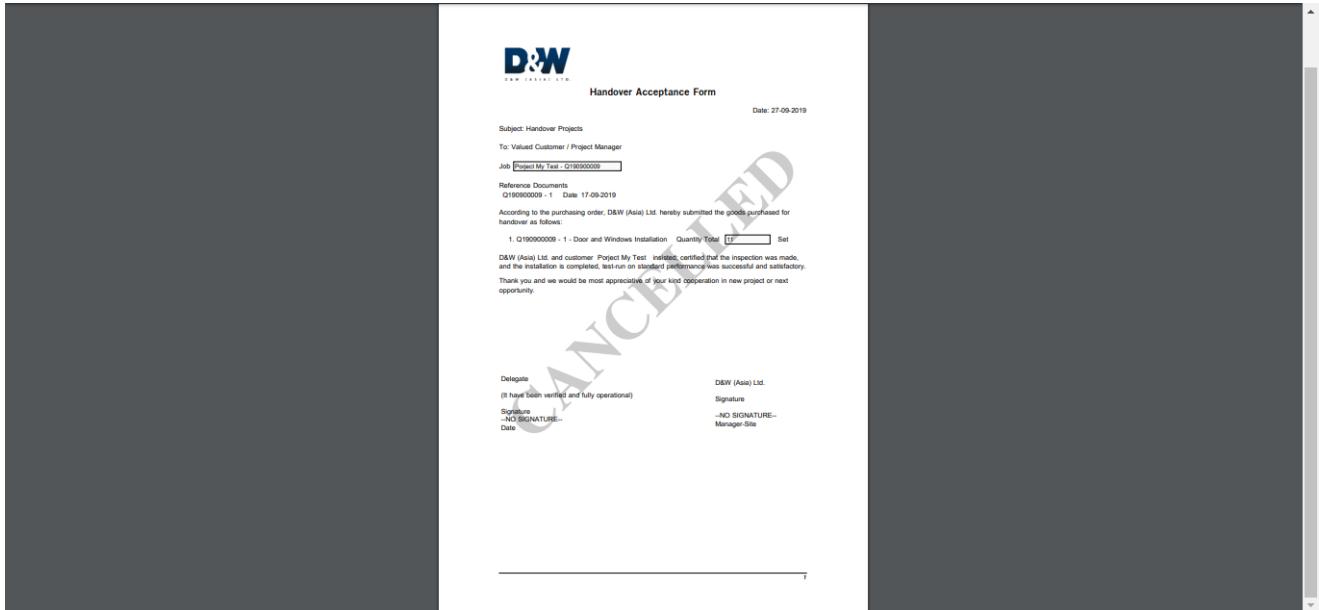
Handover List View								
Project List		Handover List						
Show 10 entries		Search: <input type="text"/>						
#	Handover No	Handover Date	Project Name	Customer Name	Address	Contact	Status	Action
1	HO2019100001	03-10-2019	Porject My Test	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: 3528 Country: 217 Zip Code: 10121	0215645465 / 0878845465	Open	<input type="button" value="Select Status"/> <input type="button" value="Select Status"/> <input type="button" value="Open"/> <input type="button" value="Close"/> <input type="button" value="Cancel Handover"/>
2	HO2019090003	27-09-2019	Porject My Test	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: 3528 Country: 217 Zip Code: 10121	0215645465 / 0878845465	Closed	<input type="button" value="Select Status"/> <input type="button" value="Select Status"/> <input type="button" value="Open"/> <input type="button" value="Close"/> <input type="button" value="Cancel Handover"/>
3	HO2019090002	27-09-2019	Porject My Test	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: 3528 Country: 217 Zip Code: 10121	0215645465 / 0878845465	Cancelled	<input type="button" value="Select Status"/> <input type="button" value="Select Status"/> <input type="button" value="Open"/> <input type="button" value="Close"/> <input type="button" value="Cancel Handover"/>
4	HO2019090001	23-09-2019	Porject My Test	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: 3528 Country: 217 Zip Code: 10121	0215645465 / 0878845465	Cancelled	<input type="button" value="Select Status"/> <input type="button" value="Select Status"/> <input type="button" value="Open"/> <input type="button" value="Close"/> <input type="button" value="Cancel Handover"/>

Showing 1 to 4 of 4 entries

Previous 1 Next

## ix. Cancelled handover document –

## x. Cancelled PDF document



## Factory Order Confirmation

Project Name	Project Address	Project Province	Customer Name	Customer Type	Customer Phone	Customer Mobile
Project Sansara Condo	180/220	Bangkok	Mark Resident	prospect		
Project A Condo	905/7 หมู่ 3, บ้านป่าพงพา	Bangkok	Mark Resident	prospect		

After the planner has completed the Site Survey, the system will display the information on the Factory Confirmation page for Sale. Create a FOC. The system will display the following information

1. Project Name
2. Project Address
3. Project Province
4. Customer Name
5. Customer Type
6. Customer Phone
7. Customer Mobile

Sales can click the + button in front of the Project Name to see the Lot details that you want to open the FOC. When clicking the + button, the system will display the following information.

1. Quotation No.
2. Quotation Lot No.
3. Lot No.
4. Measurement Finish คือ Lot เป็น Final Measurement เรียบร้อยแล้ว

\*\* For opening FOC in the case that each Lot has different Measurement Finish status. Lot can be selected at the same time if the Lot has the same Measurement Finish status.

Factory Order Confirmation List							
<input checked="" type="checkbox"/> Create		<input type="button" value="Pending"/>		<input type="button" value="Send"/>		<input type="button" value="Cancel"/>	
Show <input type="text" value="20"/> entries							Search: <input type="text"/>
Project Name	Project Address	Project Province	Customer Name	Customer Type	Customer Phone	Customer Mobile	
Project Sansara Condo	180/220	Bangkok	Mark Resident	prospect			
Quotation No	Quotation Lot No	Lot No	Measurement Finish	<input checked="" type="checkbox"/>			
Q190900003	Q190900003L1	1	No	<input checked="" type="checkbox"/>			
Q190900003	Q190900003L2	2	No	<input checked="" type="checkbox"/>			
Project A Condo	905/7 พระราม 3, บางโพงพาง	Bangkok	Mark Resident	prospect			
Showing 1 to 2 of 2 entries							<input type="button" value="Previous"/> <input type="button" value="1"/> <input type="button" value="Next"/>
							<input type="button" value="Create FOC"/> <input type="button" value="Cancel Order"/>

Create FOC button is for creating the FOC.

Cancel Order button is for wanting to cancel that lot.

When done selecting the Lot to open the FOC, press the Create FOC button in the bottom right corner.

The system will display a window for entering information to open FOC

1. Header section have buttons are as follows
  - a. Button for Print Preview
  - b. Site Report button for see file Site Survey
  - c. FOC button
  - d. Save button
  - e. Save and Send button
2. The section for entering data for opening a FOC. It contains the following required information.
  - a. Final Draft Drawing
  - b. Activate Date on Site
  - c. When the site expected to be ready to measure opening \*\* In the case of Final Measurement, the system will take the date according to the date of the Site Survey.

**FACTORY ORDER CONFIRMATION**

Date : 30-09-2019

\* Final Draft Drawing :  No file chosen

Quotation Number : Q190900003L1, Q190900003L2,

**Project Information**

Project Name :	Project Sansara Condo	Dev/Contractor :	<input type="text" value="Contractor"/>
Site Address :	180/220 Bangpongpong Yannawa Bangkok Thailand	Site Contact :	<input type="text" value="Contact Name"/>
* Deliver to Country :	<input type="text" value="Thailand"/>	Contact No. :	<input type="text" value="Contact Phone"/>
		* Province :	<input type="text" value="Bangkok"/>

\* Activate date on site :  Remarks :

\* When the site expected to be ready to measure openings :

Remarks :

**Sale Information**

Sale Name :	<input type="text" value="sales"/>	Position :	<input type="text" value="sales"/>
Dealer Name :	<input type="text" value="Nothing selected"/>	Glass Supply By :	<input type="text" value="DW Fletcher"/>
Transport by :	<input type="text" value="DW Fletcher"/>	Installation by :	<input type="text" value="DW Fletcher"/>

**Detailed Notes to Factory**

Notes :

After enter information already can click Save or Save and Send

1. If you click the Save button, it will save first but not yet completed for the next step. Data will be in the Pending tab.
2. If you click the Save and Send button, the system will save and send the data to the next step. The information of that FOC will be shown in the Send tab.

D&W TRAX

D&W TRAX(production) (Welcome. thanawat@buildersmart.com).admin

Factory Order Confirmation List

Factory Order Confirmation List

Create Pending Send Cancel

Show 20 entries Search:

FOC No.	Project Name	Project Address	Customer Name	Customer Mobile	FOC Date Submit	Production status	Production Date	Action
FOC2019090001	Project 1234	123.	Pichit Co.,Ltd.		23-09-2019	Finish	2019-09-23	
FOC2019090002	Project Sansara Condo	180/220	Mark Resident		30-09-2019	Not start		

Showing 1 to 2 of 2 entries Previous 1 Next

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Authorized List

Project Folder

Finance Confirmation

Site Service

Factory Management

Logistic Management

After Sales Service

Reports

## Planner View (Production Status Tab)

The screenshot shows the 'Planner View List' interface. At the top, there are tabs: Dashboard, Request Quotation List, Request Draft Drawing, Site Survey, Production Status (which is active and highlighted in blue), and Issue Tracking. Below the tabs, there are filters for Status ('Please Select...'), including 'Include Finish not dispatch' and 'Include Finish dispatch already'. The 'Show' dropdown is set to 20 entries, and a 'Search:' input field is present. The main area contains a table with columns: FOC No., Date Submit, Production Start Date, Production Status, Update Production Status, Reject, View, and Ready to Send. One row is displayed for FOC No. FOC2019090002, with Date Submit 30-09-2019 and Production Start Date as '-' (Not Start). The Production Status is Not Start. Action buttons include 'Please Select' dropdown, 'Reject' (red), 'VIEW' (blue), and 'Ready' (green). At the bottom, it says 'Showing 1 to 1 of 1 entries' and has navigation buttons for Previous, Next, and a page number 1.

After do Site Measurement finish system will show information in Planner View (Production Status)

### 1. Header for Filter Data

1. Status
2. Include Finish not Dispatch is FOC finish but not ready to Delivery
3. Include finish dispatch already is FOC finish and ready to Delivery

### 2. Information section

1. FOC No
2. Date Submit
3. Production Start Date
4. Production Status
5. Update Production Status
  - i. Start
  - ii. Start with Exception
  - iii. Rework
  - iv. Finish pass QC
  - v. On hold
  - vi. Cancel

6. Reject for Reject FOC \*\*before Start Production
7. View for see file related to this FOC
8. Ready to Send for change item in this FOC to delivery

The process of starting production must confirm the date of delivery before you can start production. If not confirmed, production cannot be started. The system will display a warning. 'Please Confirm Delivery Date First !'



Confirmation of delivery date is as follows

1. Click the + icon in front of FOC. The system will show all Lot details under that FOC. The system will display the following information
  - a. Quotation No.
  - b. Project Name
  - c. Salesperson
  - d. Expect Delivery Date (Sales)
  - e. Expect Delivery Date (Site)
  - f. Confirm Expect Delivery Date
  - g. Confirm Finish production Date for Planner put finish Production date
  - h. Update Delivery Date for Planner confirm delivery date \*\*default with Expect

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Admin

Status: Please Select... ▾  Include Finish not dispatch  Include Finish dispatch already

Show: 20 entries Search: [ ]

FOC No.	Date Submit	Production Start Date	Production Status	Update Production Status	Reject	View	Ready to Send
FOC2019090002	30-09-2019	-	Not Start	Please Select	Reject	<b>VIEW</b>	Ready
Quotation No.	Project Name	Sales Person	Expect Delivery Date (Sales)	Expect Delivery Date (Site)	Confirm Expect Delivery Date	Confirm Finish Production Date	Update Delivery Date
Q190900003L1	Project Sansara Condo	sales	09-10-2019	09-10-2019	-	04-11-2019	Expect
Q190900003L2	Project Sansara Condo	sales	10-10-2019	10-10-2019	-	Please Confirm..	Expect

Showing 1 to 1 of 1 entries

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Admin

Status: Please Select... ▾  Include Finish not dispatch  Include Finish dispatch already

Show: 20 entries Search: [ ]

FOC No.	Date Submit	Production Start Date	Production Status	Update Production Status	Reject	View	Ready to Send
FOC2019090002	30-09-2019	-	Not Start	Please Select	Reject	<b>VIEW</b>	Ready

Confirm Production finish date

Confirm production finish date :

« October 2019 »

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Expect Delivery Date (Site) Confirm Expect Delivery Date Confirm Finish Production Date Update Delivery Date

10-2019 - 04-11-2019 Expect

10-2019 - Confirm Expect Confirm

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Admin

Status: Please Select... ▾  Include Finish not dispatch  Include Finish dispatch already

Show: 20 entries Search: [ ]

FOC No.	Date Submit	Production Start Date	Production Status	Update Production Status	Reject	View	Ready to Send
FOC2019090002	30-09-2019	-	Not Start	Please Select	Reject	<b>VIEW</b>	Ready
Quotation No.	Project Name	Sales Person	Expect Delivery Date (Sales)	Expect Delivery Date (Site)	Confirm Expect Delivery Date	Confirm Finish Production Date	Update Delivery Date
Q190900003L1	Project Sansara Condo	sales	09-10-2019	09-10-2019	-	04-11-2019	Expect
Q190900003L2	Project Sansara Condo	sales	10-10-2019	10-10-2019	-	08-11-2019	Expect Confirm Revise

Showing 1 to 1 of 1 entries

Previous 1 Next

The image consists of two screenshots of a software application interface, likely a CRM or project management system.

**Screenshot 1 (Top):** This screenshot shows a list of items with a modal dialog open. The dialog is titled "New delivery date" and contains a date input field with the placeholder "New delivery date :". Below the input field is a calendar for October 2019, showing days from 29 to 31. At the bottom of the calendar are "SUBMIT" and "CANCEL" buttons. The main list behind the dialog includes columns for FOC No., Date Submit, Production Start Date, Production Status, and several buttons like "Please Select", "Reject", "VIEW", and "Ready".

**Screenshot 2 (Bottom):** This screenshot shows the same list and modal dialog, but the modal now displays a confirmation message: "Confirm delivery date : 09-10-2019". The main list remains the same, showing the same columns and buttons.

There will be 2 Update Delivery Date cases which are

1. Revise is change Expect Delivery Date (Site) to new delivery date
2. Confirm is follow date from Expect Delivery Date (Site)

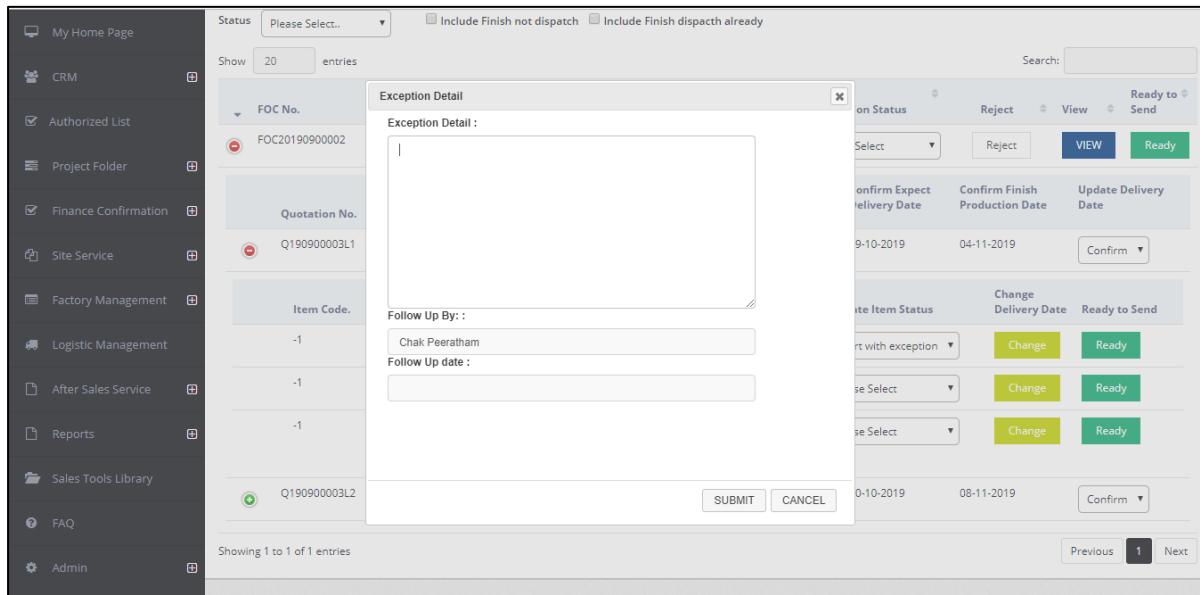
After the start production, in case some products need to wait for the hardware or without of production materials but can still produce products. Planner can update status by product type as follows

1. Click the + icon next to the Quotation No. The system will display all the products under that quotation lot.
2. Select the Update Item Status box. Select Start with Exception.
3. The system will display a window for entering information

- a. Exception Detail
  - b. Follow up By
  - c. Follow up date
4. Click Submit. The system will save the Exception information and when you view the product information again, the + icon will appear on the product page with Exception.

Quotation No.	Project Name	Sales Person	Expect Delivery Date (Sales)	Expect Delivery Date (Site)	Confirm Expect Delivery Date	Confirm Finish Production Date	Update Delivery Date
Q190900003L1	Project Sansara Condo	sales	09-10-2019	09-10-2019	Please Confirm..	Expect	

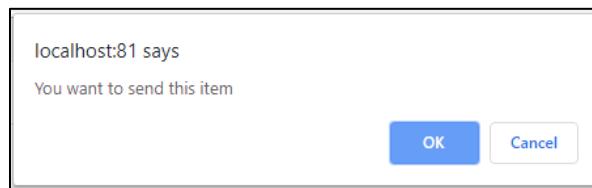
Quotation No.	Project Name	Sales Person	Expect Delivery Date (Sales)	Expect Delivery Date (Site)	Confirm Expect Delivery Date	Confirm Finish Production Date	Update Delivery Date
Q190900003L1	Project Sansara Condo	sales	09-10-2019	09-10-2019	09-10-2019	04-11-2019	Confirm



FOC Details							
Status	Please Select..	Include Finish not dispatch		Include Finish dispatch already		Search:	
FOC No.	FOC2019090002	Date Submit	Production Start Date	Production Status	Update Production Status	Reject	Ready to Send
Quotation No.	Q190900003L1	30-09-2019	01-10-2019	Start	Please Select	Reject	VIEW Ready
Item Code.	-1	Width(mm)	Height (mm)	Qty.	Item Status	Update Item Status	Change Delivery Date Ready to Send
Exception Detail	Door Lock 1 Set	Follow Date	Follow By	Finish Date	Finish		
		2019-11-05	planner	-			
	-1	4000.00	2400.00	1	Start	Please Select	Change Ready
	-1	2000.00	2300.00	1	Start	Please Select	Change Ready
Q190900003L2	Project Sansara Condo	sales	10-10-2019	10-10-2019	10-10-2019	08-11-2019	Confirm

If Production is finished, Planner can update the status of either FOC or Product by selecting Update Production Status or Update Item Status. Once the update is complete, if all products are FOC or FOC is completed, that item will hide from to see the table, click on the Check Box include finish not dispatch for see details.

But the products in this FOC will not be delivered to Logistic to deliver the products until the planner has clicked Ready to Send. You can choose from both the header and each product.



But if the product cannot be delivered within the specified date, Planner can click the Change button by product list to Can change the delivery date the steps are as follows.

1. Click Change button
2. The system will display the new delivery date. And will be divided into 2 cases which are
  - a. In case the date of entry is the same as the date of delivery of any Lot under the FOC, that product will be moved to that Lot.
  - b. In the case that the entered dates do not match any lot, the system will create a new lot.

The screenshot shows a software interface with a sidebar containing navigation links like 'Authorized List', 'Project Folder', 'Finance Confirmation', etc. The main area displays a table of project details. A modal dialog is open over the table, titled 'New delivery date'. It contains a date input field with '13-11-2019' and a calendar for November 2019. The calendar highlights the 13th. Below the calendar are 'SUBMIT' and 'CANCEL' buttons. At the bottom of the modal is a 'Please Select' dropdown and 'Change' and 'Ready' buttons. The main table row for 'Q190900003L1' shows an 'Expect Delivery Date (Sales)' of 09-10-2019 and an 'Expect Delivery Date (Site)' of 09-10-2019. After applying the change, the 'Expect Delivery Date (Site)' is updated to 13-11-2019.

This screenshot shows the same software interface after the delivery date change was applied. The modal dialog is closed, and the main table now shows three rows. The first row for 'Q190900003L1' has an 'Expect Delivery Date (Site)' of 09-10-2019. The second row for 'Q190900003L2' has an 'Expect Delivery Date (Site)' of 10-10-2019. The third row for 'Q190900003L3' has an 'Expect Delivery Date (Site)' of 13-11-2019. The 'Change' and 'Ready' buttons are visible at the bottom of the table row for 'Q190900003L3'.

## Planner View (Request Quotation List)

The screenshot shows a web-based application interface titled "D&W TRAX(production) (Welcome, thanawat@buildersmart.com).admin". The main header includes navigation tabs: Dashboard, Request Quotation List (which is currently selected), Request Draft Drawing, Site Survey, Production Status, and Issue Tracking. On the left, there is a vertical sidebar with various icons. The main content area is titled "Planner View List" and contains a table with the following columns: No., Req. No., Project Name, Customer, Planner Name, Submit Date, Status, Sale Name, and Assign. There are four rows of data in the table:

No.	Req. No.	Project Name	Customer	Planner Name	Submit Date	Status	Sale Name	Assign
1	<a href="#">RFQ190900003</a>	Project Test 4567	Patcharee Kurcharen		-	Pending	Sales	<button>Assign</button>
2	<a href="#">RFQ190900004</a>	Project A Condo	Mark Resident		-	Pending	Sales	<button>Assign</button>
3	<a href="#">RFQ190900001</a>	Project 1234			-	Pending	Sales	<button>Assign</button>
4	<a href="#">RFQ190900002</a>	Project 1234	Pichit Co.,ltd.		23-09-2019	Complete	Sales	<button>Assign</button>

At the bottom right of the table, there are buttons for "Previous", "1", and "Next".

After the Sales Create Request Quotation, the system will display the list of Sales Request which will show the details as follows

- Req No.
- Project Name
- Customer
- Planner Name
- Submit Date
- Status
- Sale Name
- Assign (Only the Planner Manager is for those cases where the Planner is not available for that Quotation.)

The process of retrieving data by clicking the Req No. number. The system will display the details page specified by Sale.

The screenshot shows a detailed view of a Request Quotation (RFQ) edit page. The top navigation bar shows the path: Home > Planner > RFQ List > RFQ Edit. The main title is "RFQ Edit". Below the title, there are several input fields and dropdown menus:

- RFQ No.: RFQ190900005
- Request Date: 26-09-2019
- Quote version: New
- Sales Person \*: sales
- Project Name \*: Project A Condo
- Customer: Mark Resident
- Project Address: 905/7 พรدرาน 3, บางโพธิ์ทอง
- Customer Address: 905/7 พรدرาน 3, บางโพธิ์ทอง
- City: Bangkok
- Customer City: Bangkok
- Thailand: Thailand
- Bangkok: Bangkok
- Customer Phone: 0896786910

At the bottom of the form, there are buttons for "Save", "Get Quote Complete", and "Discard".

The page shows the information specified by Sales which is divided into 2 parts which are:

### 1 Button

- Save button
- Get Quote Quotation button
- Discard button

### 2 Information section

For data retrieval from MRP, click the Get Quote Quotation button. The system will display a field to fill in to retrieve information.

RFQ No. RFQ190900005

Request Date 26-09-2019

Quote version New

Sales Person \* sales

Which will be a box for entering information as follows

1. Check Box for select MRP between V6 or Qomsoft
2. Quotation Number for put Quotation number That matches in Quotation in MRP
3. Click Submit

When you have submitted your data, the system will display the message in the Result box. There will be a total of 3 cases.

1. In case of finding new data, the button will show "Import Data" and after extracting data, View Quotation button will be displayed.

2. In the case that the data that is matched with the old data in the system will display the Update Quotation button and the View Quotation button
3. If the data is not found, the system displays the message Not Found data

The screenshot shows the 'RFQ Edit' page of the D&W TRAX application. At the top, there are three buttons: 'Save' (green), 'Hide Quote Complete' (white), and 'Discard' (white). Below these are two radio buttons for selecting software: 'V6' (selected) and 'Qomsoft'. A text input field for 'Quotation number' contains '2119'. A 'Submit' button is present. A message below says 'Result : New data and version found is 9' and has a 'Get Import Data' button. At the bottom, there are four dropdown fields: 'RFQ No.' (RFQ19090005), 'Request Date' (26-09-2019), 'Quote version' (New), and 'Sales Person' (sales).

The screenshot shows the 'View Quotation' page. At the top, there are 'Accept' and 'Delete' buttons. Below that, there are fields for 'Quotation No.' (2045) and 'Quotation Title.' (Test by Saranya - Export), and a 'Quotation Date.' field (04-05-2019). A 'Show' dropdown set to '20' and a 'Search' input field are also visible. The main area is a table listing five items:

No.	Item Des.	Item Series.	Qty.	Glass Type	Width	Height	Gross Sell Price.	Discount	Installation.	Unit Price.	Total Price.
1	D1 - Sliding OX	Urban Sliding Door	1	6mm Clr Float Tough	2000	2000	61,604.72	6,160.47	3,000.00	58,444.25	58,444.25
2	D2 - Flushline & WT Slider - 2 Panel	Sliding Door(new)	1	6mm Clr Float Tough	2000	2300	63,371.25	0.00	3,450.00	66,821.25	66,821.25
3	D3 - Flushline & WT Slider - 4 Panel	Sliding Door(new)	1	6mm Clr Float Tough	4000	2400	116,283.51	0.00	7,200.00	123,483.51	123,483.51
4	D4 - Flushline & WT Stacker - 3 Panel	Multi-Sliding Door with Two Tracks	1	6mm Clr Float Tough	3000	2200	99,356.86	0.00	4,950.00	104,306.86	104,306.86
5	D5 - Universal Only - Multislider - 4 Panel	Multi-Sliding Door with Three	1	6mm Clr Float	3500	2400	141,543.61	0.00	6,300.00	147,843.61	147,843.61

## Planner View (Request Draft Drawing)

The page to display the list of Request Draft Drawing that Sales has requested.

1. Req No.
2. Project Name
3. Customer Name
4. Planner Name
5. Submit Date
6. Status
7. Sale Name
8. Floor Plan
9. Upload Drawing button

The upload process by Planner. Click the Upload Drawing button. The system will display a box for attaching the Drawing file.

When the file is attached, press the Submit button. The system will save the Drawing file to complete the process.

### **Planner View (Issue Tracking)**

This page for Planner or Production Manager. Issue the item that the site has opened. In order to view and manage the work. The Planner table can be viewed on the Planner View page. The Issue Tracking tab will show the following information

1. No
2. Issue No
3. Project Name
4. Item Code
5. Happened By
6. Create By
7. Create Date
8. Action By
9. Action Date
10. Status

No.	Issue No	Project Name	Item Code	Issue Detail	Happened By	Create By	Create Date	Action By	Action Date	Status
1	SO2019100001	Project Sansara Condo	-1		Installation	thanawat keattikulkangwan	01-10-2019			Not start

Which the process to do Issue can to by

1. Click on Issue No. The system will show the data table which Site opens which is Issue Informaiton.

Issue Information	
Issue No :	SO2019100001
Item Name :	-1
Quantity :	1
Issue Type :	Hardware
Issue File :	(document icon)
Priority:	High
Created By:	Thanawat keattikulkangwan
Project Name :	Project Sansara Condo
Item Description :	D2 - Flushline & WT Slider - 2 Panel1
Happened By :	Installation
Issue Detail :	
Need to Resolve Date :	11-10-2019
Created Date :	01-10-2019

2. Planner can specify the solution in the action Information section.

Action Information	
Action :	Please Select..
Delivery Date :	
Action Detail :	
Action By :	Thanawat keattikulkangwan
Action Date :	01-10-2019

## Logistics

- I. Logistics – This function is for Logistics Team to be able to plan the delivery. Go to Logistics menu to access this function. There are 5 Tabs in this page: Items for Delivery, Exceptions for Delivery, Picking List, Assign to Truck, Delivery Orders.
- a. Items for Delivery – This page contains the Project Lots that are ready to be delivered.

Delivery List View										
Delivery List View										
	Items for Delivery	Exceptions for Delivery	Picking List	Assign To Truck	Delivery Orders					
Show	10	entries						Search:		
	Project Name	Quotation No	Lot #	Customer	Address	Confirmed Delivery Date	Payment	Site Ready	Action	
1	Project A	Q190900001	1	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	18-09-2019	Yes	Yes	Please Select	
2	Project My Test	Q190900009	1	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	25-09-2019	Yes	Yes	Please Select	
3	Project A	Q190900001	2	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	30-09-2019	Yes	Yes	Please Select	
4	Project IT	Q190900002	1	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok	30-09-2019	Yes	Yes	Please Select	

- i. To View the Items – click on the plus (+) sign.
- ii. To create Picklist – In the Action column, select Create Picklist in the dropdown to create picking list for the lot to be delivered.
- iii. To update the delivery date – Provide reason when delivery date is needed to update. If delivery date is updated, the system will send email to Site Managers, Planners, Production Managers and Sales.

Delivery List View										
Delivery List View										
	Items for Delivery	Exceptions for Delivery	Picking List	Assign To Truck	Delivery Orders					
Show	10	entries						Search:		
	Project Name	Quotation No	Lot #	Customer	Address	Confirmed Delivery Date	Payment	Site Ready	Action	
1	Project A	Q190900001	1	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	18-09-2019	Yes	Yes	Please Select	
2	Project My Test	Q190900009	1	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	25-09-2019	Yes	Yes	Please Select	
3	Project A	Q190900001	2	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	30-09-2019	Yes	Yes	Please Select	

Change Delivery Date

New Delivery Date:

Reason:

- b. Exceptions for Delivery – This page contains all the exception items ready to be delivered.

- c. Picking List – This page is the picking list page.

Project Name	Customer	Address	Confirmed Delivery Date	Create Delivery
Project Run	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	18-09-2019	<button>Create DO</button>
Project Run	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	27-09-2019	<button>Create DO</button>
Project Run	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok Country: Thailand Zip Code: 10121	03-10-2019	<button>Create DO</button>
Project Run	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: Bangkok	08-10-2019	<button>Create DO</button>

- To View Items – click on the plus (+) sign
- To create Delivery Order – Select the items under the Lot that we want to add to the Delivery Order then click “Create DO” button.

- d. Assign to Truck – This is where the DO's will be added to the truck.
- Select the delivery date we want to plan.
  - Select the DO's the we want to add to the truck on the table on the left side.
  - Then select the schedule of the truck on the right side.
  - Then click on the Right Arrow button at the middle page.
  - And lastly, click on Save button.
  - To delete DO's from the truck, click on the (x) button.

The screenshot shows the 'Delivery List View' application. On the left, there is a vertical toolbar with icons for file operations like New, Open, Save, Print, and Delete. The main header says 'Delivery List View'. Below the header, there are five tabs: 'Items for Delivery', 'Exceptions for Delivery', 'Picking List', 'Assign To Truck' (which is highlighted in blue), and 'Delivery Orders'. A 'Delivery Date' input field shows '27-09-2019' with a calendar icon and a 'Get DO' button. A 'Save' button is positioned below the date field. To the right, there is a large table titled 'Date: 27-09-2019' with columns for 'Truck', time slots (8-10 AM, 10-12 PM, 1-3 PM, 3-5 PM, 5-7 PM, 7 PM onwards), and a list of truck numbers (1 กก 63, 84-2983). The table has two rows: one for a customer named Naphak Sooklon with address 905/7 Bangpong pang Yannawa Bangkok Thailand 10110, and another row for DO2019090003.

- e. Delivery Orders – This page contains all the Delivery Orders created. The Confirmed Delivery Date cell will turn into red if the delivery is already late.
- To view Items – Click on the plus (+) button
  - To send orders for delivery, select “Delivery” in the status dropdown.

The screenshot shows the 'Delivery List View' application again, but this time the 'Delivery Orders' tab is active. The interface is similar to the previous one, with the same vertical toolbar and tabs. The main area displays a table of delivery orders. The columns are: Delivery No, Project Name, Customer, Address, Confirmed Delivery Date, Actual Delivery Date, Truck, Status, and Received Date. The 'Confirmed Delivery Date' column uses a red background for dates in the past. The table shows three entries:

Delivery No	Project Name	Customer	Address	Confirmed Delivery Date	Actual Delivery Date	Truck	Status	Received Date
DO2019090002	Porject My Test	Naphak Sooklon	Address: 182/20 Bangpong pang Yannawa Province: Bangkok Country: Thailand Zip Code: 10120	30-09-2019	20-09-2019	84-2983	Received	20-09-2019 15:04
DO2019090003	Project A	Naphak Sooklon	Address: 905/7 Bangpong pang Yannawa Province: Bangkok Country: Thailand Zip Code: 10110	27-09-2019			Planned	
DO2019090001	Porject My Test	Naphak Sooklon	Address: 182/20 Bangpong pang Yannawa Province: Bangkok Country: Thailand Zip Code: 10120	25-09-2019	19-09-2019	1 กก 63	Received	19-09-2019 15:24

At the bottom, it says 'Showing 1 to 3 of 3 entries' and has navigation buttons for 'Previous', 'Next', and a page number '1'.

## Warranty

- I. Warranty – This page is where sales create the warranty document of the product. Go to After Sales Service → Warranty menu. Warranty is automatically created after all the project lots has been handed over to the costumer.

#	Warranty No	Project Name	Customer	Address	Contact #	Installation Paid	Warranty Start Date	Warranty Expiry Date	Warranty Status	Delete
1	WRT20191000001	My Test	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: 3528 Country: 217 Zip Code: 10121	0215645465 / 0878845465	Waiting	03/10/2019	03/10/2024	Not Activated	<button>Delete</button>

- a. To view handover document under the warranty – click plus (+) button.
- b. To view warranty document – click on the warranty number link.

**D&W**  
D&W (ASIA) LTD.

**Doors and Windows Warranty**

D&W (Asia) Ltd. and the doors and windows Partner named on this card warrants that the doors and windows system products installed at your premises shall be free from defects in materials and workmanship for a period of 2 years from the warranty start date by D&W (Asia) Ltd. or its authorized partner.

Purchaser: Naphak Sooklon

D&W Partner/ Service Provider:

Country/State Supplied: Thailand

Products Supplied:

And that the products have been finished by D&W (Asia) Ltd. and are in use as Architectural Aluminium items for the project identified below.

**Project Covered by this Warranty:**

Name of Project: My Test

Location of Project: 182/20 Bangpongpong Yannawa Bangkok 10120 Thailand

- c. To delete warranty document – click on delete button
- d. To print warranty PDF file – click on the Print PDF Button

**D&W**

**Doms and Windows Warranty**

D&W (Asia) Ltd. and the doms and windows Partner network on this site warrant that the items and components supplied by D&W (Asia) Ltd. and the Partner network to the customer will remain watertight for a period of 2 years from the warranty start date by D&W (Asia) Ltd. or its Subcontractor.

**Purchase Order Number:**

**Product Supplied:**

**Category:**

**Project Covered by this Warranty:**

**Name of Project:**

**Location of Project:**

**Finishing Type:**

**Finishing Color:**

**Warranty Start Date:**

**Warranty End Date:**

**Project Job Number:**

**Warranty Options:**

1 year warranty for doors and windows

2 year warranty against leakage

2 year warranty against Firestop Screen

2 year warranty against Glazing

2 year warranty applies for other

**Subcontractor:**

Weather doors and windows

Other

Glazing

Firestop Screen

**D&W (Asia) Ltd. exclusive manufacturer in Asia for Pacific Pacific Resort, Aventura Apartments, and other residential systems, warrants that:**

a. The hardware and components supplied have been specifically selected to ensure a long lasting performance and reliability. The hardware and components supplied will remain watertight for a period of 2 years from the warranty start date.

b. A limited guarantee is given that the hardware and components supplied will remain watertight for a period mentioned in Finishing Type above, against cracking, flin and colour integrity.

c. The hardware and components supplied will remain watertight for a period of 2 years from the warranty start date, against leakage, provided that it is applied in accordance with WMD Preworking Quality Assurance System.

d. The hardware and components supplied will remain watertight for a period of 2 years from the warranty start date, against firestop, provided that it is applied in accordance with the following codes:

- i. NCC 2004-1974A Specification for Aluminium Windows
- ii. NCC 401-1996 Code of Practice for Glazing in Buildings
- iii. NCC 402-1996 Code of Practice for Fire Protection

**D&W**

\* At the time of purchase NCC 401, the doors and windows specified shall remain watertight.

\* If System warranty provider by service provider in the region.

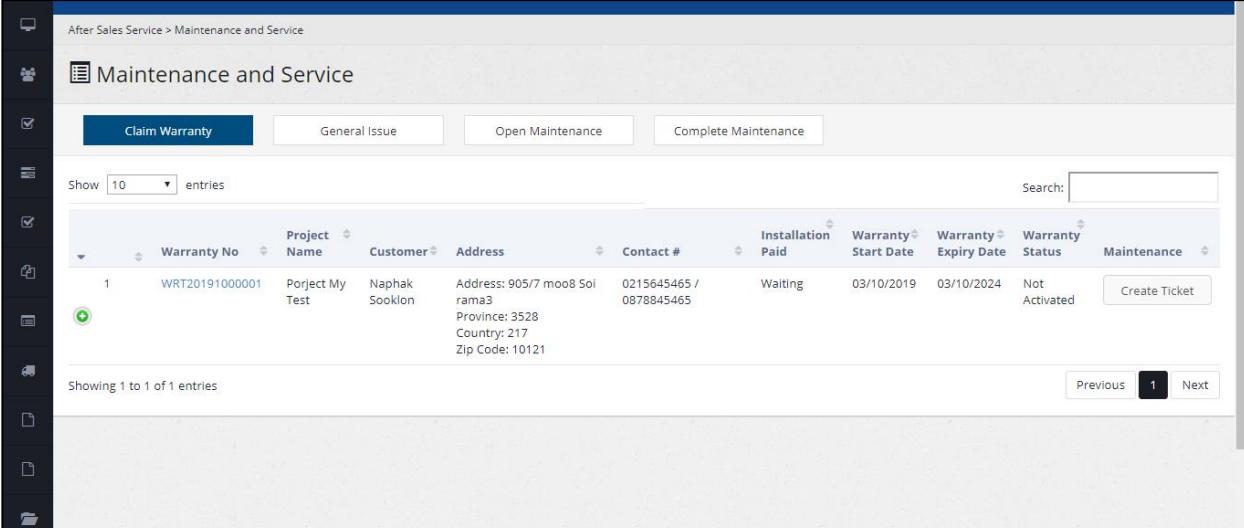
If any claim is made under the warranty, D&W (Asia) Ltd. or the Partner will make good the doors and windows, subject to the following terms:

- a. Proof of purchase (including by invoice) will be required to validate claims when making a warranty claim.
- b. That the Partner or D&W (Asia) Ltd staff is advised of, and given an opportunity to inspect the claim.
- c. That any claims under the warranty need to be made in writing to the Partner or by email to D&W (Asia) Ltd. or to the relevant Partner.
- d. That the Partner or D&W (Asia) Ltd staff will inspect the claim.

1. Where the Product has been maintained in accordance with the maintenance procedures outlined in the "Aluminium Care and Maintenance" booklet, or as shown on the Partner Aluminium website.

## Maintenance and Service

- II. Maintenance and Service – This page is for the customer service to create warranty and maintenance services. Go to After Sales -> Maintenance and Service to access this function. There are four (4) tabs in this function: Claim Warranty, General Issue, Open Maintenance, Complete Maintenance.
- a. Claim Warranty – This page is where they create the maintenance and services under the warranty.

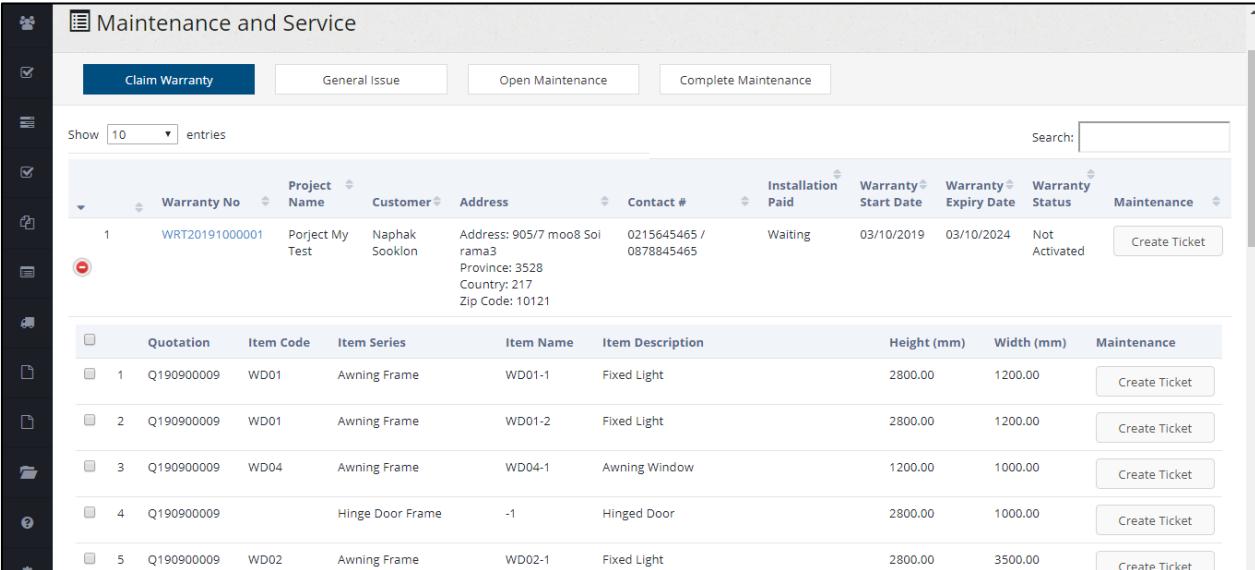


The screenshot shows the 'Maintenance and Service' page with the 'Claim Warranty' tab selected. A single warranty entry is listed:

	Warranty No	Project Name	Customer	Address	Contact #	Installation Paid	Warranty Start Date	Warranty Expiry Date	Warranty Status	Maintenance
1	WRT2019100001	Porject My Test	Naphak Sooklon	Address: 905/7 moo8 Soi rama3 Province: 3528 Country: 217 Zip Code: 10121	0215645465 / 0878845465	Waiting	03/10/2019	03/10/2024	Not Activated	<button>Create Ticket</button>

Showing 1 to 1 of 1 entries

- i. To view items of the warranty – click on the plus (+) button.



The screenshot shows the same 'Maintenance and Service' page after clicking the plus (+) button next to the warranty entry. The expanded view shows the following items:

Quotation	Item Code	Item Series	Item Name	Item Description	Height (mm)	Width (mm)	Maintenance	
1	Q190900009	WD01	Awning Frame	WD01-1	Fixed Light	2800.00	1200.00	<button>Create Ticket</button>
2	Q190900009	WD01	Awning Frame	WD01-2	Fixed Light	2800.00	1200.00	<button>Create Ticket</button>
3	Q190900009	WD04	Awning Frame	WD04-1	Awning Window	1200.00	1000.00	<button>Create Ticket</button>
4	Q190900009		Hinge Door Frame	-1	Hinged Door	2800.00	1000.00	<button>Create Ticket</button>
5	Q190900009	WD02	Awning Frame	WD02-1	Fixed Light	2800.00	3500.00	<button>Create Ticket</button>

- ii. To create ticket – click Create Ticket button, Create Maintenance and Service Ticket page will pop up. Fill up all necessary details then save. The new ticket will go to open maintenance tab. Once the ticket is created, the system will send email to the site manager.

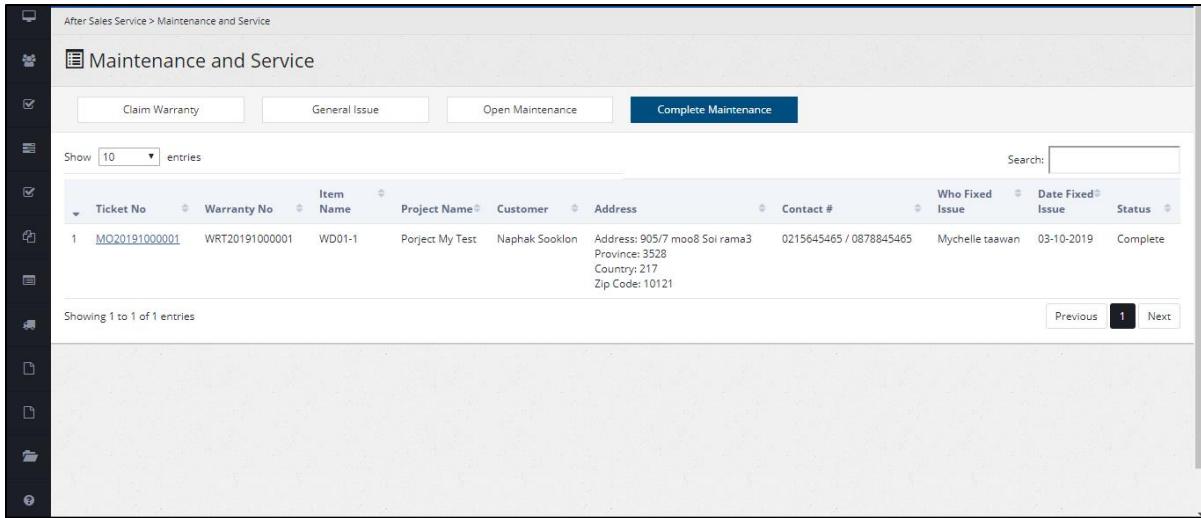
- b. Open Maintenance tab – This page contains all the Open Maintenance ticket.

- i. To view Maintenance Ticket – click on the ticket number.

- ii. To assign team to do the maintenance – the site manager should select the team to do the maintenance and update status to In-progress and then save.

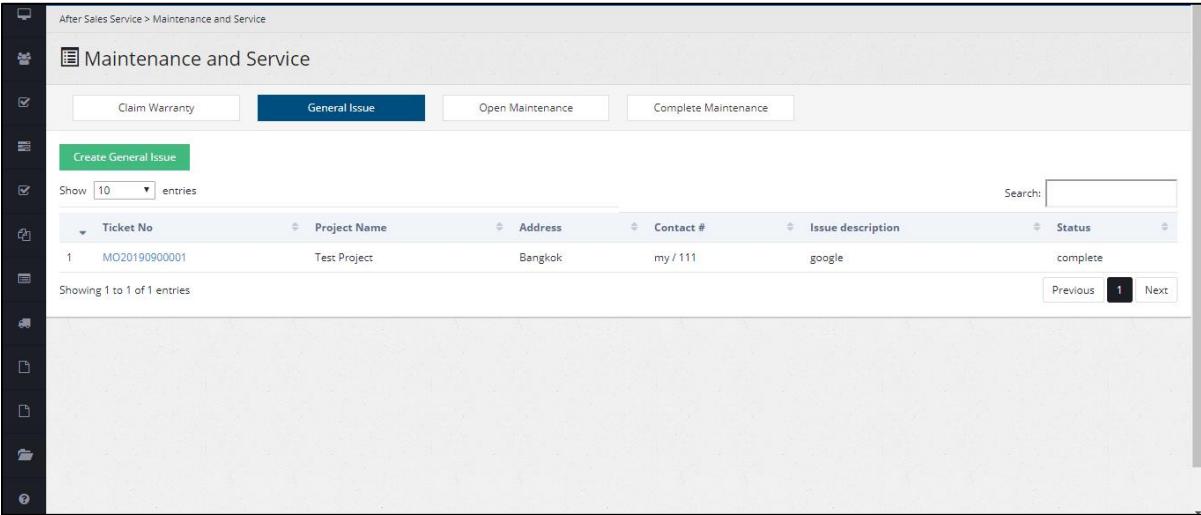
- iii. To close the maintenance ticket – the maintenance person will go to the system and open the maintenance page and describe the solution and update status to Complete.

c. This page contains all the completed maintenance.



The screenshot shows a web-based application interface for managing maintenance and service requests. The title bar indicates 'After Sales Service > Maintenance and Service'. The main header is 'Maintenance and Service' with tabs for 'Claim Warranty', 'General Issue', 'Open Maintenance', and 'Complete Maintenance'. The 'Complete Maintenance' tab is currently selected. A search bar at the top right allows for searching by various fields. Below the search bar is a table displaying one entry. The columns in the table are: Ticket No, Warranty No, Item Name, Project Name, Customer, Address, Contact #, Who Fixed Issue, Date Fixed Issue, and Status. The single entry shown is: MO2019100001, WRT2019100001, WD01-1, Project My Test, Naphak Sooklon, Address: 905/7 moo8 Soi ram3, Province: 3528, Country: 217, Zip Code: 10121, Who Fixed Issue: Mychelle taawan, Date Fixed Issue: 03-10-2019, and Status: Complete. The bottom of the table area shows a message 'Showing 1 to 1 of 1 entries'.

d. General Issue – this page is where they create maintenance and services that are not under the warranty or general issues.



The screenshot shows the same web-based application interface for managing maintenance and service requests. The title bar and header are identical to the previous screenshot. The 'General Issue' tab is now selected. A green button labeled 'Create General Issue' is visible. A search bar is present at the top right. Below the search bar is a table displaying one entry. The columns in the table are: Ticket No, Project Name, Address, Contact #, Issue description, and Status. The single entry shown is: MO2019090001, Test Project, Bangkok, my / 111, google, and Status: complete. The bottom of the table area shows a message 'Showing 1 to 1 of 1 entries'.

- i. To create general issue – click on Create General Issue button and fill up all necessary details then save. Once the ticket is created, the system will send email to the site manager.

D&W TRAX(production) (Welcome, mychelle@buildersmart.com).admin

After Sales Service > Maintenance and Service

Maintenance a

Create General Issue

Show 10 entries

Ticket No

1 MO2019090001

Showing 1 to 1 of 1 entries

**Create Maintenance and Service Ticket**

**Project Information**

Project Name: Condo A Project Address: Rama III

**Maintenance Information**

Category of Maintenance: Frame Estimate Date: 11-10-2019

Issue Description: Bent Frame

Free Charge

Contact Information

Name of Contact: Num Phone Number: 422-02-02 Email: num@buildersmart.com

Save Close

- ii. To Assign Team – Site Manager will assign team and update status to In-progress
- iii. To complete the issue – Site Technician needs to provide details of the solution and update status to complete.

D&W TRAX(production) (Welcome, mychelle@buildersmart.com).admin

After Sales Service > Maintenance and Service

Maintenance a

Claim Warranty

Create General Issue

Show 10 entries

Ticket No

1 MO2019100001

Showing 1 to 1 of 1 entries

**Maintenance and Service Ticket**

**Project Information**

Project Name: Test Project Project Address: Bangna Bangkok

**Maintenance Information**

Ticket No.: MO2019100001 Category of Maintenance: Glass

Estimated Maintenance Date: 16-10-2019 Issue Description: Broken Glass

Free Charge

**Job Information**

Assign Team: Select Team Status: Open

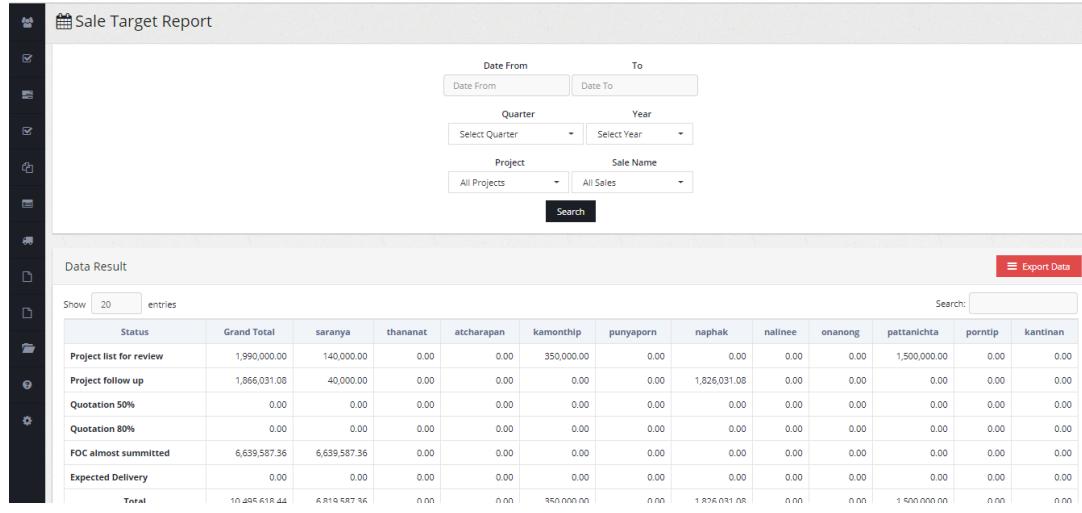
Solution:

Save Close

## Reports

- Sale Target Report

This page is report for sales or manager to see amount or total by status base with sales. Can filter by date, quarter and year, project, sales and can export the data to excel file.

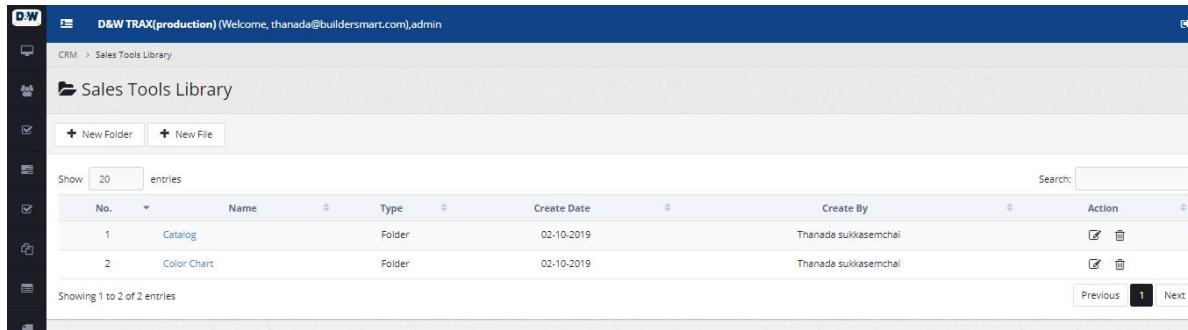


The screenshot shows the 'Sale Target Report' interface. At the top, there are several filter dropdowns: 'Date From' and 'To', 'Quarter' (Select Quarter), 'Year' (Select Year), 'Project' (All Projects), and 'Sale Name' (All Sales). Below the filters is a 'Search' button. The main area is titled 'Data Result' and contains a table with 20 entries. The columns include Status, Grand Total, and various names like saranya, thananat, atcharapan, kamonthip, punyaporn, naphak, nolinee, onanong, pattanicha, porntip, and kantinan. The table shows financial data for different projects and sales stages. A red 'Export Data' button is located in the top right corner of the data grid.

(Sales target report)

## Sales Tools Library

This page for upload file, image, catalog all user can see this page. Can create folder or upload file.

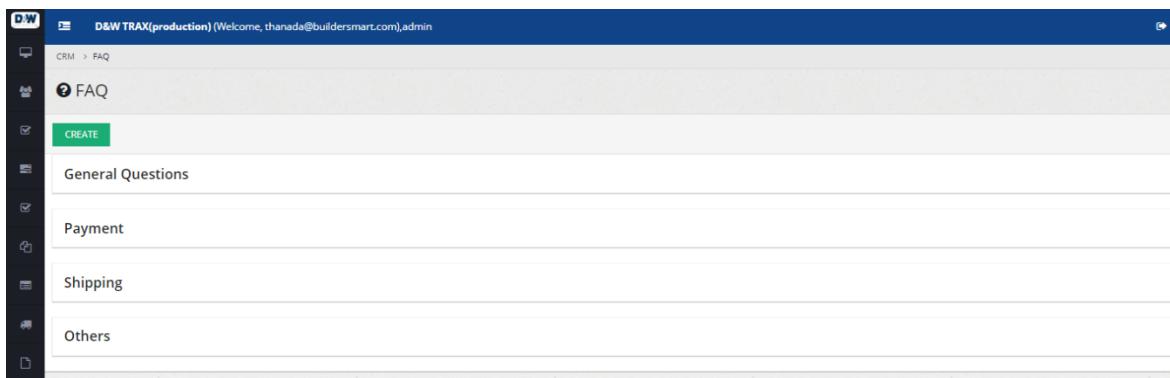


The screenshot shows the 'Sales Tools Library' interface. The top navigation bar includes 'CRM' and 'Sales Tools Library'. The main area has a title 'Sales Tools Library' and two buttons: '+ New Folder' and '+ New File'. Below is a table with 20 entries. The columns are No., Name, Type, Create Date, Create By, and Action. Two entries are visible: 'Catalog' (Folder, 02-10-2019, Thanada sukkasemchai) and 'Color Chart' (Folder, 02-10-2019, Thanada sukkasemchai). At the bottom, it says 'Showing 1 to 2 of 2 entries' and has 'Previous' and 'Next' buttons.

(Sales tools library)

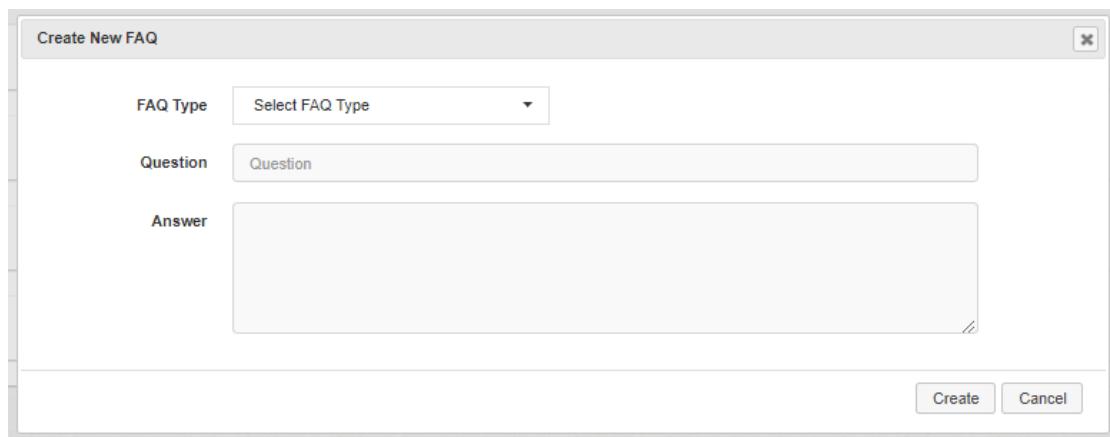
## FAQ

This page for any question for user. Separate by header of FAQ. Can manage FAQ that create will show to another user or not by admin.



The screenshot shows a web-based application interface for managing Frequently Asked Questions (FAQ). The top navigation bar includes the logo 'DW', the title 'D&W TRAX(production) (Welcome, thanada@buildersmart.com),admin', and a search bar. Below the navigation is a sidebar with various icons and a 'FAQ' section. The main content area displays a list of FAQ categories: 'General Questions', 'Payment', 'Shipping', and 'Others'. A 'CREATE' button is located at the top left of the list.

(FAQ List)



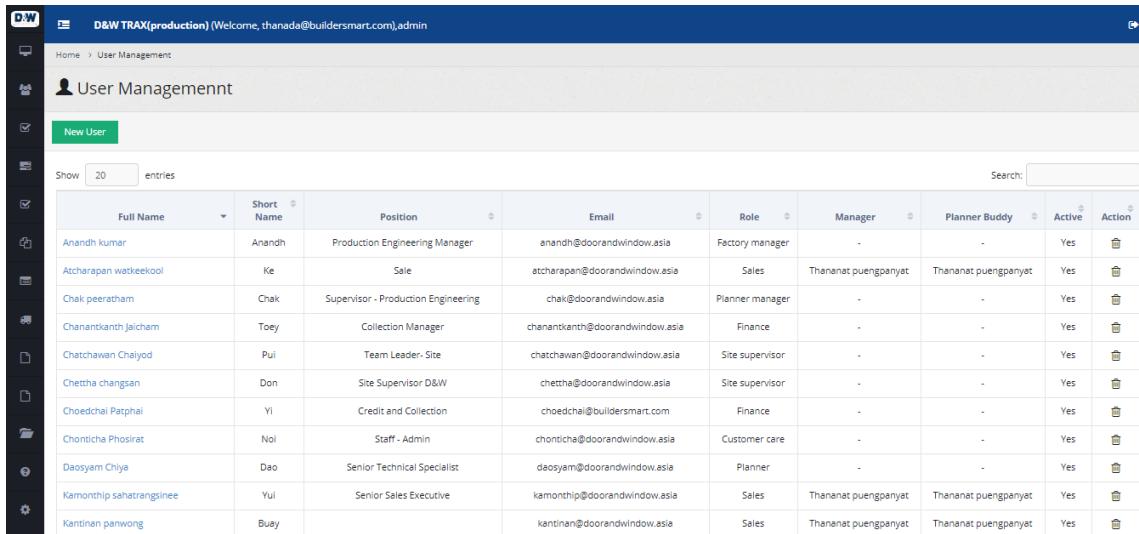
The screenshot shows a modal dialog box titled 'Create New FAQ'. It contains three input fields: 'FAQ Type' (with a dropdown menu showing 'Select FAQ Type'), 'Question' (containing the text 'Question'), and 'Answer' (a large text area). At the bottom right of the dialog are two buttons: 'Create' and 'Cancel'.

(Dialog to create new FAQ)

## Admin

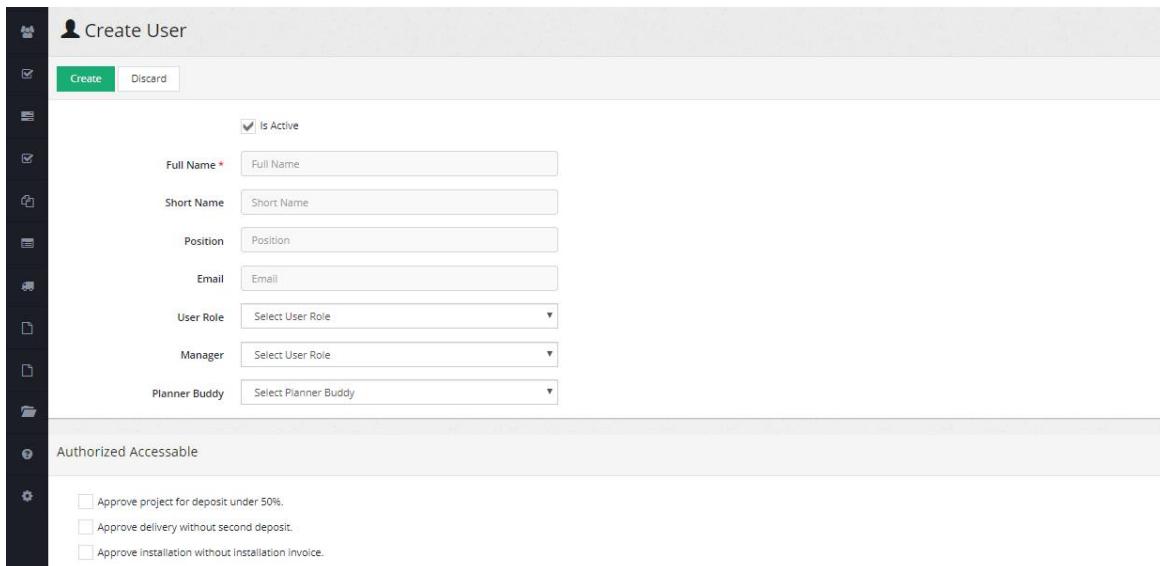
- User Management

This page for admin to create, update for user to access to TRAX. For create sales must select planner buddy, for approver must select authorized accessible.



Full Name	Short Name	Position	Email	Role	Manager	Planner Buddy	Active	Action
Anandh kumar	Anandh	Production Engineering Manager	anandh@doorandwindow.asia	Factory manager	-	-	Yes	
Atcharapan watkeekool	Ke	Sale	atcharapan@doorandwindow.asia	Sales	Thananat puengpanyat	Thananat puengpanyat	Yes	
Chak peeratham	Chak	Supervisor - Production Engineering	chak@doorandwindow.asia	Planner manager	-	-	Yes	
Chanantkanth jaicham	Toey	Collection Manager	chanantkanth@doorandwindow.asia	Finance	-	-	Yes	
Chatchawan Chaiyod	Pui	Team Leader- Site	chatchawan@doorandwindow.asia	Site supervisor	-	-	Yes	
Chettha chongsan	Don	Site Supervisor D&W	chettha@doorandwindow.asia	Site supervisor	-	-	Yes	
Choedchalai Patphai	Yi	Credit and Collection	choedchalai@buildersmart.com	Finance	-	-	Yes	
Chonticha Phosirat	Noi	Staff - Admin	chonticha@doorandwindow.asia	Customer care	-	-	Yes	
Daosyam Chiy	Dao	Senior Technical Specialist	daosyam@doorandwindow.asia	Planner	-	-	Yes	
Kamonthip sahatrangsinee	Yui	Senior Sales Executive	kamonthip@doorandwindow.asia	Sales	Thananat puengpanyat	Thananat puengpanyat	Yes	
Kantinan panwong	Buay		kantinan@doorandwindow.asia	Sales	Thananat puengpanyat	Thananat puengpanyat	Yes	

(User management list)



Is Active

Full Name \*

Short Name

Position

Email

User Role

Manager

Planner Buddy

Authorized Accessable

Approve project for deposit under 50%.

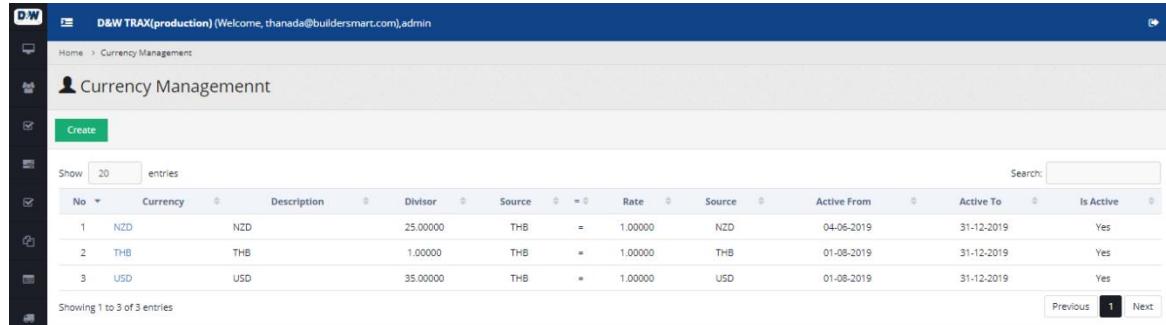
Approve delivery without second deposit.

Approve installation without installation invoice.

(Create user page)

- **Currency Setup**

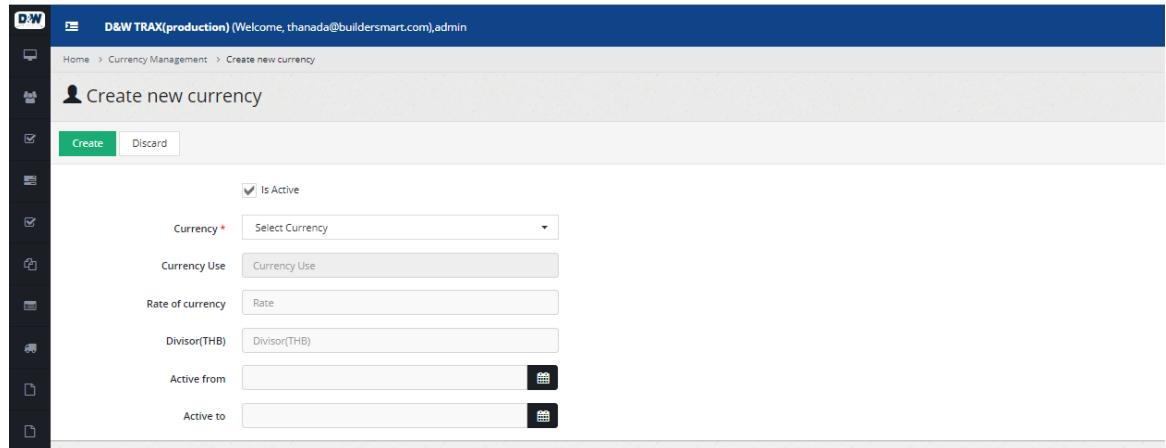
This page for set up currency (for convert when get data from Qomsoft and V6)  
Can select active date and set is active or not.



The screenshot shows a table with columns: No, Currency, Description, Divisor, Source, Rate, Source, Active From, Active To, and Is Active. The data is as follows:

No	Currency	Description	Divisor	Source	Rate	Source	Active From	Active To	Is Active	
1	NZD	NZD	25.00000	THB	=	1.00000	NZD	04-06-2019	31-12-2019	Yes
2	THB	THB	1.00000	THB	=	1.00000	THB	01-08-2019	31-12-2019	Yes
3	USD	USD	35.00000	THB	=	1.00000	USD	01-08-2019	31-12-2019	Yes

(Currency List)



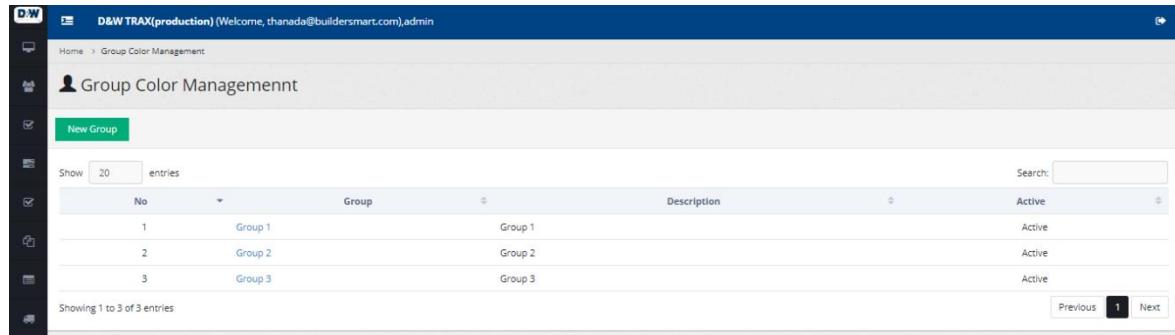
The screenshot shows a form with the following fields:

- Is Active:** checked
- Currency:** Select Currency dropdown
- Currency Use:** Currency Use dropdown
- Rate of currency:** Rate input field
- Divisor(THB):** Divisor(THB) input field
- Active from:** Active from date input field
- Active to:** Active to date input field

(Currency create page)

- **Group Color Management**

For create group color to keep color in the group.



The screenshot shows a table with columns: No, Group, Description, and Active. The data is as follows:

No	Group	Description	Active
1	Group 1	Group 1	Active
2	Group 2	Group 2	Active
3	Group 3	Group 3	Active

(Group color management)

New Group

Is Active

Group Name

Group Description

**Save** **Cancel**

(Dialog to create new group)

- Color Management

This page for manage color in Trax to show in RFQ (request for quotation)

Home > Color Management

Color Management

New Color

No	Color Name(Trax)	Group	Code	Desc	Category code	Category description	Color Code	Color Desc.	Category code	Category description	Colour code	Colour description	Category code	Category description	Product statistic 1	Product statistic 2	Active
1	Almond Matt (9153141M)	Group 1	MATT_BLACK	MATT BLACK GN291A (XK)	Group1	Group1	9153141M	Almond Matt (Duraloy)	Colours	Colours	9153141M	Almond Matt	Colours	Colours	Powder Colours		Yes
2	Appliance White Matt	Group 1	MATT_BLACK	MATT BLACK GN291A (XK)	Group1	Group1					9151274M	Appliance White Matt					Yes
3	Arctic White	Group 1	MATT_BLACK	MATT BLACK GN291A (XK)	Group1	Group1						Arctic White					Yes
4	Autumn Brown	Group 1	MATT_BLACK	MATT BLACK GN291A (XK)	Group1	Group1					1035989PX20	Autumn Brown					Yes

(Color Management)

Create New Color

Create Discard

Is Active

Group

Color Name \*

V6

Color code <input type="text" value="Color code"/>	Category code <input type="text" value="Category code"/>
Color description <input type="text" value="Color description"/>	Category description <input type="text" value="Category description"/>

Qomsoft

Color Code <input type="text" value="Color Code"/>	Category code <input type="text" value="Category code"/>
Color description <input type="text" value="Color description"/>	Category description <input type="text" value="Category description"/>

Sage

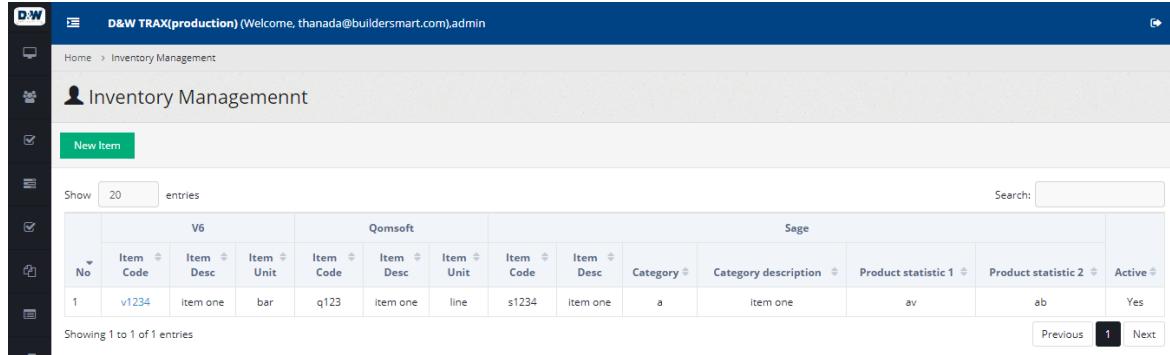
Colour code <input type="text" value="Colour code"/>	Category code <input type="text" value="Category code"/>
Colour description <input type="text" value="Colour description"/>	Category description <input type="text" value="Category description"/>

Product statistic 1  Product statistic 2

(Create color page)

- Inventory Management

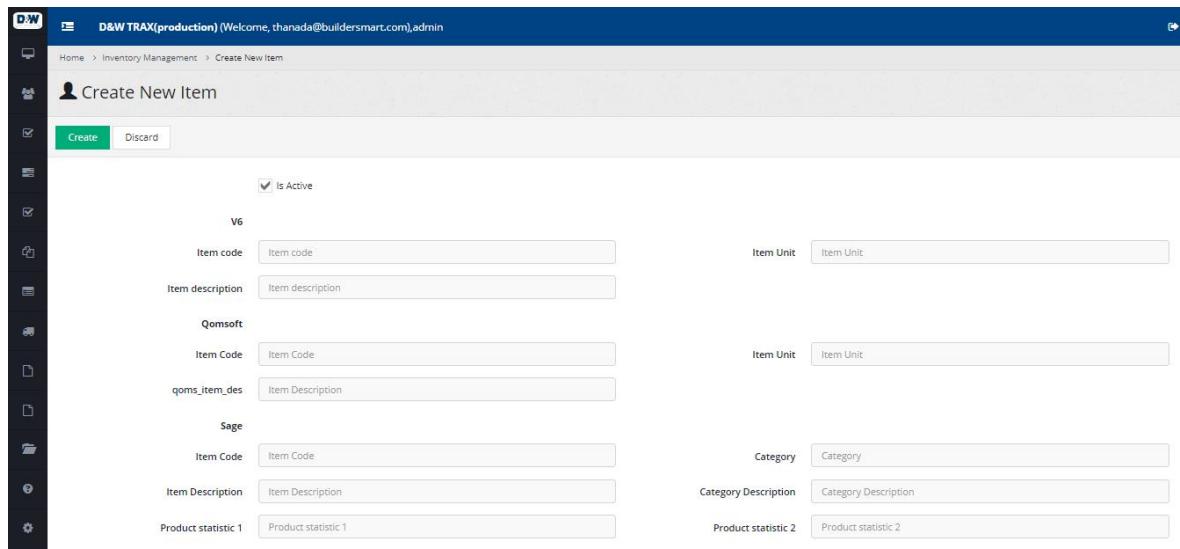
This will use for Trax connect with SAGE to manage inventory code.



The screenshot shows a table with the following data:

No	V6 Item Code	V6 Item Desc	V6 Item Unit	Qomsoft Item Code	Qomsoft Item Desc	Qomsoft Item Unit	Sage Item Code	Sage Item Desc	Sage Category	Sage Category description	Sage Product statistic 1	Sage Product statistic 2	Sage Active
1	v1234	item one	bar	q123	item one	line	s1234	item one	a	item one	av	ab	Yes

(Inventory List)



The screenshot shows a form with the following fields:

<input checked="" type="checkbox"/> Is Active	
<b>V6</b>	
Item code	Item code
Item description	Item description
<b>Qomsoft</b>	
Item Code	Item Code
qoms_item_des	Item Description
<b>Sage</b>	
Item Code	Item Code
Item Description	Item Description
Product statistic 1	Product statistic 1
Category	Category
Category Description	Category Description
Product statistic 2	Product statistic 2

(Inventory create item)

- Create new inventory item, separate by V6, Qomsoft and sage this will be integrate when send BOM to sage.

- KPI Settings

This page is setting for planner, site, production for calculate KPI - Planner KPI

Quote days: will calculate after sales submit request for quotation

Site Survey days: Will calculate from first deposit received.

Draft Drawing days: Will calculate from after site survey.

The screenshot shows the 'KPI Setting' page under the 'Planner KPI' tab. It includes fields for 'Quote Days' (3), 'Site Survey Days' (3), and 'Draft Drawing Days' (4). Each field has a descriptive tooltip below it.

Setting	Value	Description
Quote Days *	3	Will calculate from request quotation date.
Site Survey Days *	3	Will calculate from deposit.
Draft Drawing Days *	4	Will calculate from From site survey.

(Planner KPI)

#### - Site and installation KPI

Site Measurement days: Will calculate after sign draft drawing.

Installation sqm/days: To calculate for team.

The screenshot shows the 'KPI Setting' page under the 'Site and Installation KPI' tab. It includes fields for 'Site Measurement Days' (7) and 'Installation Sqm/days' (20). Each field has a descriptive tooltip below it.

Setting	Value	Description
Site Measurement Days *	7	Will calculate from sign drawing.
Installation Sqm/days *	20	Will calculate sqm per day/team from delivery.

(Site and Installation KPI)

#### - Production KPI

Production days: will calculate after site measurement for production team.

The screenshot shows the 'KPI Setting' page under the 'Production KPI' tab. It includes a single field for 'Production Days' (28), which has a descriptive tooltip below it.

Setting	Value	Description
Production Days *	28	Will calculate from site measurement.

(Production KPI)

- Other Settings

This page for setup vat (%) and cost per sqm, this will calculate in quotation.

The screenshot shows the 'Other Setting' page in the D&W TRAX application. The URL is 'D&W TRAX(production) (Welcome, thanada@buildersmart.com).admin'. The page title is 'Other Setting'. There are two buttons at the top: 'Update' (green) and 'Discard' (grey). Below these are two input fields: 'Vat (%)' with value '7' and 'Setting for vat calculate'; and 'Cost per sqm.' with value '750.00' and 'Setting for installation calculate' below it. A vertical sidebar on the left contains icons for Home, Requests, Other Settings, and Help.

(Other Setting)

- Request Form Management

This for mange list in request form page, can add, edit, delete or dis-active the item in the list.

System type: list for system, can add, edit, delete and deactivate the list.

The screenshot shows the 'Request form management' page. The URL is 'D&W TRAX(production) (Welcome, thanada@buildersmart.com).admin'. The page title is 'Request form management'. At the top, there are four filter buttons: 'System Type' (selected), 'Hardware Type', 'Hardware Color', and 'Glass'. Below is a search bar with 'Show 20 entries' and a 'Search:' field. A table lists six system types: Fletcher, Nulook, Freedom, Brio, D&W Screen, and Other. Each row includes columns for No., System Name, System Desc., Is Active, Created By, and Action (with a delete icon). At the bottom, it says 'Showing 1 to 6 of 6 entries' and has 'Previous' and 'Next' buttons.

(System Type List)

The screenshot shows the 'Create New System Type' dialog box. It has a title bar 'Create New System Type' with a close button. Inside, there is a list of existing system names on the left: Fletcher, Nulook, Freedom, Brio. On the right, there are fields for 'System Name' (with placeholder 'System Name') and 'System Description' (with placeholder 'System Description'). A checkbox 'Is Active' is checked. At the bottom are 'Create' and 'Cancel' buttons.

(Dialog to create system)

Hardware type: list for hardware type, can add, edit, delete and deactivate the list.

The screenshot shows a table with the following data:

No	Hardware Name	Hardware Desc.	Is Active	Created By	Action
1	Aria Endeavour and Helix for Awning Casement		Yes	thanada sukkasemchai	
2	Aria Endeavour and Multi-point for Awning Casement		Yes	thanada sukkasemchai	
3	Malta for all system		Yes	thanada sukkasemchai	
4	Malta and Multi-point for Awning Casement		Yes	thanada sukkasemchai	
5	Other		Yes	thanada sukkasemchai	

(Hardware Type List)

The dialog box contains the following fields:

- Is Active:
- Hardware Name \*:
- Hardware Description:
- Create:
- Cancel:

(Dialog to create new hardware type)

Hardware color: list for hardware color, can add, edit, delete and deactivate the list.

The screenshot shows a table with the following data:

No	Hardware Color	Hardware Color Desc.	Is Active	Created By	Action
1	Black		Yes	thanada sukkasemchai	
2	White		Yes	thanada sukkasemchai	
3	Silver		Yes	thanada sukkasemchai	

(Hardware Color List)

Create New Hardware Color

Is Active

Hardware Color \*

Hardware Color Description

(Dialog to create new hardware color)

Glass: list for color, thickness, type and description for glass, can add, edit, delete and deactivate the list.

Request form management

System Type    Hardware Type    Hardware Color    **Glass**

Create new glass

No	Glass Color	Glass Type	Glass Description	Glass Thickness	Is Active	Created By	Action
1	Clear	Float	Clear Float (Annealed) 6mm	6.00	Yes	-	
2	Clear	Float	Clear Float (Annealed) 8mm	8.00	Yes	-	
3	Clear	Float	Clear Float (Annealed) 10mm	10.00	Yes	-	
4	Clear	Float	Clear Float (Annealed) 12mm	12.00	Yes	-	
5	Clear	Float	Clear Float (Annealed) 15mm	15.00	Yes	-	
6	Clear	Float	Clear Reflective Float 6mm	6.00	Yes	-	
7	Clear	Float	Clear Reflective Float 8mm	8.00	Yes	-	
8	Blue	Float	Blue Toned Float 6mm	6.00	Yes	-	

(Glass List)

Create New Glass

Is Active

Glass Color \*

Glass Type

Glass Thickness

Glass Description

(Dialog to create glass list)

- Team Management

This page for managing the team for installation, the system will display the information divided into 2 tabs which are

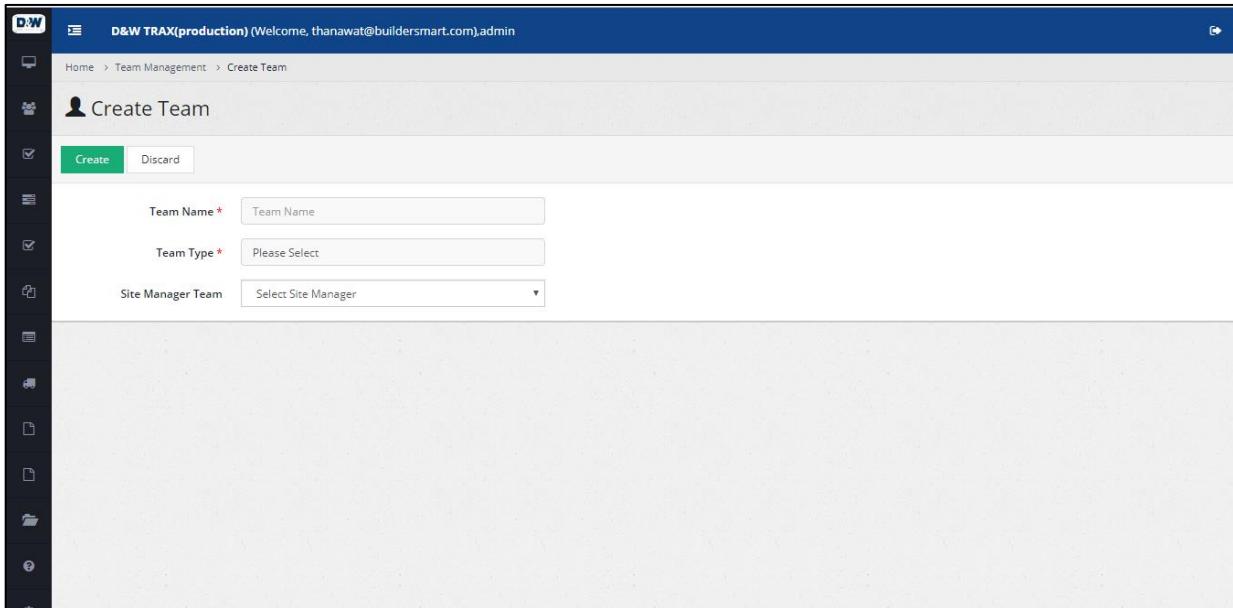
**Team** Is a list of all installation teams that exist within the system Which will display information

- a. Team Name
- b. Manager Name

Team Name	Site Manager	Action
Team Install A		

### How to build a team

1. Click Create Team
2. The system will display the following input fields:
  - 2.1 Team Name
  - 2.2 Team Type
  - 2.3 Manager

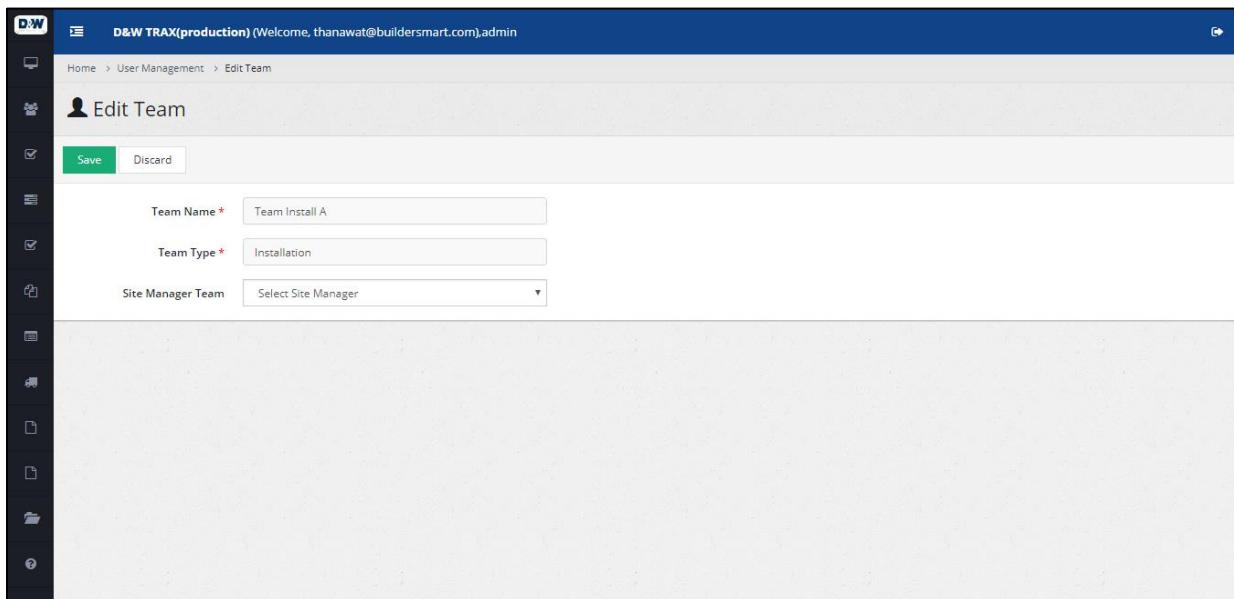


The screenshot shows the 'Create Team' form. At the top, there's a header bar with the application name 'D&W TRAX(production)' and a welcome message. Below the header, the breadcrumb navigation shows 'Home > Team Management > Create Team'. The main title 'Create Team' is displayed with a user icon. There are two buttons at the top left: 'Create' (highlighted in green) and 'Discard'. The form contains three input fields: 'Team Name \*' with placeholder 'Team Name', 'Team Type \*' with placeholder 'Please Select', and 'Site Manager Team' with a dropdown menu showing 'Select Site Manager'. On the far left, there's a vertical sidebar with various icons.

3. When all the information is filled in, click Create to save the information

### **Edit Team**

1. Click on team name
2. The system will display a window to edit the team name, team type and team manager name.



The screenshot shows the 'Edit Team' form. The header and breadcrumb are identical to the 'Create Team' page. The main title 'Edit Team' is shown with a user icon. There are two buttons at the top left: 'Save' (highlighted in green) and 'Discard'. The form fields are the same as the 'Create Team' page: 'Team Name \*' (placeholder 'Team Install A'), 'Team Type \*' (placeholder 'Installation'), and 'Site Manager Team' (dropdown menu 'Select Site Manager'). The vertical sidebar on the left is also present.

## Delete Team

1. Click on trash icon
2. System will show confirm box 'Are you sure you want to deactivate this team?'

**Team Member** Which will show the list of all technicians And can fix which team the mechanic is on Which will display information

- a. Fullname
- b. Role
- c. Team Name
- d. Team Manager
- e. Action

Full Name	Role	Team Name	Team Manager	Action
Chatchawan Chaiyod	site supervisor	-	-	<button>Edit</button>
Chettha changsan	site supervisor	-	-	<button>Edit</button>
Yomna changsan	site supervisor	-	-	<button>Edit</button>

## How to identify teams

1. Click Edit
2. The system will display a box to choose team
3. Specify the team
4. Click Submit button. The system will save the information. If you don't want to save, press Cancel or the cross icon.

Screenshot of the D&W TRAX(production) application interface showing the Team Management screen.

The main header shows "D&W TRAX(production) (Welcome, thanawat@buildersmart.com).admin". The left sidebar includes icons for Home, Team Management, Create Team, and other system functions.

The main content area is titled "Team Managementnt" and displays a table of team members:

Team Manager	Action
Chatchawan Chaiyod	Edit
Chettha changsan	Edit
thapanaphong wirosombut	Edit
Yomna changsan	Edit

A modal dialog titled "Select Team" is open, prompting "Team Site :" with a dropdown menu containing "Please Select...". Below the modal, a note says "site supervisor".

Table footer: Showing 1 to 4 of 4 entries. Navigation buttons: Previous, 1, Next.