

Revision

Overall: wag na baguhin mga terms na ginamit sa Prototype

Dashboard

- Sidebar Color gawin white may border na lang na emerald green (see the prototype)
- Remove A-Risha floating information
- Gawing Editable yung profile
- Remove Activity logs
- Remove No. of Customer palitan ng No. of ongoing credit customer
- Remove No. of Appliances palitan ng number of past due
- “Total Sales by Item” not “Total Sales by Appliances”
- Pag nag i-scroll pababa dapat hindi sumasama yung sidebar
- Gawing “K” yung indicator ng thousands sa Total Sales by Item
- Lagyan ng fixed amount yung Total Sales per Month
- Kung ano ang may pinaakamataas na sales na item sya dapat yung nasa pinakataas na bar

Category

- “Add Items” not “Add Appliances”
- Lakihan ng Space yung price column
- Sa title ng list ng mga category sa baba dapat “Items Category” not “Appliances Category”
- Items and categories tab ay sentence case not upper case
- “Add Category” muna bago “Add Items”
- Lagyan ng filtering na kapag nag enter si admin ng same data as category or items ay hindi na dapat tanggapin kasi nag-eexist na
- “Unit” dapat hindi “Quantity”. Wag gawing default sa pc/s dapat meron ding set, bundle, etc.

Customer

- Pag naglagay ng phone number si user dapat numbers lang pwede bawal letters
- Sa upload document dapat pwede pa din mag edit kahit nakapaglagay na document
- Magdagdag ng Sale Button na nakalink sa “New Customer Sales” (see the prototype).

- Sa view button ng customer nandun na din yung other info na nasa prototype, Requirements, Purchase History (Active and Fully Paid). Nakalagay na din kung good payer or bad payer sya
- Sa “Add Customer” ang mga ilalagay ay; Full name, Address na may municipality at barangay na dropdown that I will provide, Street Name, House Number, Birthday, Civil Status, Citizenship

Sales

- “New Customer Sale” not “Add Customer”
- Dapat nababago ang “Date of Avail”
- Sa Select Customer at Select Appliances dapat pa-type format
- Bagong format ng “New Customer Sales. (see the prototype)
- “Previous |1| Next” button and “Search” dapat susunod kapag nag swipe. Gawin din na floating yung swipe bar.
- “Promotion or Discount Applied” not “Promotion Applied or Discount”

Cash

- “Promotion or Discount Applied” not “Promotion Applied or Discount”
- Payment type pwede na cash pwede din na E-payment
- Lagyan ng upload button para sa receipt

Credit

- New Table Format (see the prototype)
- Payment type pwede na cash pwede din na E-payment
- Lagyan ng upload button para sa receipt
- Lagyan ng date of avail, monthly deadline, date finished
- Bawat day na late payment si customer equivalent sa penalty na 5% of the monthly payment ex. 1000 ang monthly ni customer na late sya ng isang araw sa pagbayad, may penalty sya na 50 pesos
- “Paid Late” not “Late Paid”
- Sa payment ng customer dapat naga reflect nadin doon yung terms na babayaran nya yung credit. Example: January 29 purchase ni Customer then 6 months nya babayaran dapat may table ng February, March, April, May, June, July dun na ilagay kung Paid or Paid Late. Kapag si customer di nagbayad for the month of March ibig sabihin past due na, lalagyan ng indicator na red na “past due” then kapag naka 3 beses na past due si customer maga display ng

“item surrender” or “pull-out item”. Lagyan din ng notification para aware si admin sa mga na pa-past due. (see the prototype)

Discounts and Promotions

- New Table format (see the prototype)
- “I” button is for the information/description of the Discount/Promotion
- Remove ID No.
- Lagyan ng column for discount percentage in case of the Discounts like 50% OFF
- New Format for “Add Discount/Promotion” (see the prototype)
- Alisin ang default na discount and promotion

Sales Report

- Generate financial reports such as sales report, aging reports, and credit usage reports. (must be customizable per month/year).
- Generate Detailed reports on customer payment behavior and credit status.

Notification

Notifications Example (For Admin)

Notification: Critical Stock Alert

Item: [Item Name]

Current Stock Level: [Current Quantity]

Threshold Level: [Threshold Quantity]

Attention is required! The stock level for *[Item Name]* has reached a critical level of *[Current Quantity]*. Immediate restocking is recommended to avoid potential shortages and fulfill customer demand. Please take action promptly to ensure inventory levels are sufficient.

Notification: Upcoming Payment Due

Customer: [Customer Name]

Amount Due: [Due Amount]

Due Date: [Due Date]

Notice: A payment of *[Due Amount]* for *[Customer Name]* is approaching its due date on *[Due Date]*. Please monitor this account for timely payment or follow up if necessary. Early action can help prevent overdue balances.

Notification: Past Due Payment

Customer: [Customer Name]

Overdue Amount: [Overdue Amount]

Original Due Date: [Due Date]

Days Overdue: [Days Overdue]

Notice: The payment of *[Overdue Amount]* for *[Customer Name]* is past due as of *[Due Date]*. It is now *[Days Overdue]* days late. Please initiate follow-up actions or contact the customer to resolve this overdue balance promptly.

Notification: Data Privacy Notice

Subject: Data Privacy Compliance Update

Date: [Current Date]

Notice: As part of our commitment to safeguarding customer information, this notice serves to remind all staff of our data privacy policies and procedures. Please ensure that all customer data is handled in accordance with applicable laws and regulations, including the Data Protection Act.

Key Points to Remember:

1. **Data Collection:** Only collect personal data necessary for business operations and inform customers about how their data will be used.
2. **Data Access:** Access to personal data is restricted to authorized personnel only. Ensure that passwords and access controls are updated regularly.
3. **Data Storage:** Securely store personal data and regularly review data retention policies to ensure information is not kept longer than necessary.
4. **Data Breaches:** Report any suspected data breaches immediately to the data protection officer. Prompt action is crucial to mitigate potential risks.

5. **Training:** Attend regular training sessions on data privacy best practices and updates to ensure compliance across all levels of the organization.

Thank you for your attention to this important matter. For questions or further information regarding data privacy policies, please contact the data protection officer.
