

Sales Management User Guide

➤ PO MANAGEMENT

1. Click **Sales Management > PO Management**

The screenshot shows the 'PO Management' page under 'Sales Management'. It includes a 'Project' dropdown, a 'Filter' dropdown set to 'All PO', and a 'Refresh' button. Below these are buttons for 'New PO', 'Delete', and 'Export', along with a 'Show 10 entries' dropdown. A table with columns like 'No', 'Project', 'ProjectCode', 'PO_No', 'PO_Date', 'PO_Type', 'Company', 'PO_Description', 'PO_Status', 'PM', 'PM_Accepted_At', 'PM_Status', 'Finance', 'Finance_Accepted_At', 'Finance_Status', and 'Payment' is visible. The status 'Showing 0 to 0 of 0 entries' is displayed at the bottom.

2. Select the **project** according to the dropdown to view the PO Management details of chosen project

This screenshot shows the 'Project' dropdown menu open, displaying a list of projects including 'MY_Huawei_Maxis_NR_Node B', 'MY_Internal_SAFETY SITE INSPECTION', 'MY_Huawei_Celcom_Southern_Reforming', 'MY', and 'MY_Huawei_Maxis_KV_Node B'. The 'Filter' dropdown remains set to 'All PO'. The table below now shows 'Showing 1 to 1 of 1 entries' with '1 row selected'.

3. You can even **filter** the view of details according to options given, then click **Refresh**.

This screenshot shows the 'Filter' dropdown menu open, displaying a list of filter options including 'All PO', 'No Project PO', 'Accepted PO', 'Pending PM Acceptance', 'Pending Finance Acceptance', 'Rejected PO', 'Ready for ESAR', and 'Ready for PAC'. The 'Project' dropdown is empty. The 'Refresh' button is highlighted. The table below shows 'Showing 1 to 1 of 1 entries' with '1 row selected'.

- **All PO:**

- Shows all the details for all the PO
- Click **New PO** to add new row
- Select the specific row and click Delete to delete
- Click **Export** to export the information into PDF, Excel or CSV

The screenshot shows the 'PO Management' interface. At the top, there's a header with 'JM' and 'JM Admin'. Below it, the page title is 'PO Management' with a breadcrumb trail: 'Home > Management Tool > Sales Management > PO Management'. The 'Project' dropdown is set to 'MY_Huawei_Celcom_Southern_Refarm'. The 'Filter' dropdown is highlighted with a red box and set to 'All PO'. There are 'Refresh' and 'Import PO' buttons. Below the filters, there are buttons for 'New PO', 'Delete', and 'Export', and a 'Show 10 entries' dropdown. A table with 16 columns is displayed, showing 2 entries. The columns are: No, Project, ProjectCode, PO_No, PO_Date, PO_Type, Company, PO_Description, PO_Status, PM, PM_Accepted_At, PM_Status, Finance, Finance_Accepted_At, Finance_Status, and Paym. The first two rows of data are visible, both with 'PM' values of '0000-00-00 00:00:00'. At the bottom, it says 'Showing 1 to 2 of 2 entries' and has 'Previous', '1', and 'Next' navigation links.

- **No Project PO:**

- Shows the details of PO that haven't been assigned to any projects
- Project Name** column will be empty
- Click **New PO** to add new row
- Select the specific row and click **Delete** to delete
- Click **Export** to export the information into PDF, Excel or CSV

The screenshot shows the 'PO Management' interface with the 'Filter' dropdown highlighted by a red box and set to 'No Project PO'. The 'Project' dropdown is empty. The 'Refresh' and 'Import PO' buttons are present. Below the filters, there are buttons for 'New PO', 'Delete', and 'Export', and a 'Show 10 entries' dropdown. A table with 16 columns is displayed, but it is empty. The columns are: No, Project_Name, Project, ProjectCode, PO_No, PO_Date, PO_Type, Company, PO_Description, PO_Status, Payment_Term, Cut, Remarks, Job_Type, Item_Description, and Scope_of_Wo. At the bottom, it says 'Showing 0 to 0 of 0 entries' and has 'Previous' and 'Next' navigation links.

- **Accepted PO**

- PM_Accepted and Finance_Accepted Column will be filled
- Click **New PO** to add new row
- Select the specific row and click **Delete** to delete
- Click **Export** to export the information into PDF, Excel or CSV
- Select the specific row and click **Finance Reject** button to reject the selected PO

The screenshot shows the 'PO Management' interface. The 'Filter' dropdown is set to 'Accepted PO', which is highlighted with a red box. The 'Project' dropdown is set to 'MY_Huawei_Celcom_Southern_Reform'. The 'Finance Reject' button is visible. The table below shows columns for PO details, but no data is displayed.

No	Project	ProjectCode	PO_No	PO_Date	PO_Type	Company	PO_Description	PO_Status	PM	PM_Accepted_At	PM_Status	Finance	Finance_Accepted_At	Finance_Status	Paym
Showing 0 to 0 of 0 entries															

- **Pending PM Acceptance**

- PM_Status Column will be empty
- Click **New PO** to add new row
- Select the specific row and click **Delete** to delete
- Click **Export** to export the information into PDF, Excel or CSV
- Click **PM Accept** button to accept selected PO
- Click **PM Reject** button to reject selected PO

The screenshot shows the 'PO Management' interface. The 'Filter' dropdown is set to 'Pending PM Acceptance', which is highlighted with a red box. The 'Project' dropdown is set to 'MY_Huawei_Celcom_Southern_Reform'. The 'PM Accept' and 'PM Reject' buttons are visible. The table below shows two entries.

No	Project	ProjectCode	PO_No	PO_Date	PO_Type	Company	PO_Description	PO_Status	PM	PM_Accepted_At	PM_Status	Finance	Finance_Accepted_At	Finance_Status	Paym
1										0000-00-00 00:00:00			0000-00-00 00:00:00		
2										0000-00-00 00:00:00			0000-00-00 00:00:00		

Showing 1 to 2 of 2 entries

- **Pending Finance Acceptance**

- a) **Finance_Status** Column will be empty
- b) Click **New PO** to add new row
- c) Select the specific row and click **Delete** to delete
- d) Click **Export** to export the information into PDF, Excel or CSV
- e) Click **Finance Accept** button to accept selected PO
- f) Click **Finance Reject** button to reject selected PO

The screenshot shows the 'PO Management' interface. The 'Filter' dropdown is set to 'Pending Finance Acceptance' and is highlighted with a red box. The 'Project' dropdown is set to 'MY_Huawei_Celcom_Southern_Reform'. The 'Refresh' button is green, and the 'Import PO' button is orange. Below the filters, there are buttons for 'Finance Accept' (blue) and 'Finance Reject' (red). The table has columns: No, Project, ProjectCode, PO_No, PO_Date, PO_Type, Company, PO_Description, PO_Status, PM, PM_Accepted_At, PM_Status, Finance, Finance_Accepted_At, Finance_Status, and Payment. The table is currently empty, showing 'Showing 0 to 0 of 0 entries'.

- **Rejected PO**

- a) **Finance_Status** and **PM_Status** Column will be with a status "Rejected"
- b) Click **New PO** to add new row
- c) Select the specific row and click **Delete** to delete
- d) Click **Export** to export the information into PDF, Excel or CSV
- e) Click **PM Accept** button to accept selected PO by PM
- f) Click **Finance Accept** button to accept selected PO by Finance

The screenshot shows the 'PO Management' interface. The 'Filter' dropdown is set to 'Rejected PO' and is highlighted with a red box. The 'Project' dropdown is set to 'MY_Huawei_Celcom_Southern_Reform'. The 'Refresh' button is green, and the 'Import PO' button is orange. Below the filters, there are buttons for 'PM Accept' (green) and 'Finance Accept' (blue). The table has columns: No, Project, ProjectCode, PO_No, PO_Date, PO_Type, Company, PO_Description, PO_Status, PM, PM_Accepted_At, PM_Status, Finance, Finance_Accepted_At, Finance_Status, and Payment. The table is currently empty, showing 'Showing 0 to 0 of 0 entries'.

- **Ready for ESAR**

- a) **First-Fifth Cut_Completed_Date** column will have “Date” filled
- b) **ESAR Date** column will be empty
- c) Click **New PO** to add new row
- d) Select the specific row and click **Delete** to delete
- e) Click **Export** to export the information into PDF, Excel or CSV
- f) Click **Proceed ESAR (Old)** button to be redirected to old ESAR
- g) Click **Proceed ESAR (New)** button to be redirected to new ESAR

The screenshot displays the 'PO Management' interface within a system. At the top, there's a navigation bar with 'JM' and 'JM Admin'. Below it, the page title is 'PO Management' under 'Sales Management'. A breadcrumb trail shows 'Home > Management Tool > Sales Management > PO Management'. The main area features a 'Project' dropdown set to 'MY_Huawei_Celcom_Southern_Reform' and a 'Filter' dropdown set to 'Ready for ESAR', which is highlighted with a red rectangle. To the right of the filter is a green 'Refresh' button and an orange 'Import PO' button. Below these are two blue buttons: 'Proceed ESAR (Old)' and 'Proceed ESAR (New)'. Further down, there are buttons for 'New PO', 'Delete', and 'Export', along with a 'Show 10 entries' dropdown. A table with various columns is visible, including 'No.', 'Project', 'ProjectCode', 'PO_No', 'PO_Date', 'PO_Type', 'Company', 'PO_Description', 'PO_Status', 'PM', 'PM_Accepted_At', 'PM_Status', 'Finance', 'Finance_Accepted_At', 'Finance_Status', and 'Payment'. The table currently shows 0 entries. At the bottom, it says 'Showing 0 to 0 of 0 entries' with 'Previous' and 'Next' links.

- **Ready for PAC**

- a) **ESAR** column will have “Date” filled
- b) **PAC Date** column will be empty
- c) Click **New PO** to add new row
- d) Select the specific row and click **Delete** to delete
- e) Click **Export** to export the information into PDF, Excel or CSV
- f) Click **Proceed PAC** button to continue the selected PO to PAC

JM PO Management Sales Management Home > Management Tool > Sales Management > PO Management

Project : Filter :

Show 10 entries

No	Project	ProjectCode	PO_No	PO_Date	PO_Type	Company	PO_Description	PO_Status	PM	PM_Accepted_At	PM_Status	Finance	Finance_Accepted_At	Finance_Status	Payment

Showing 0 to 0 of 0 entries Previous Next

4. Click **Import PO** to import details from other files.

JM PO Management Sales Management Home > Management Tool > Sales Management > PO Management

Project : Filter :

Show 10 entries

No	Project	ProjectCode	PO_No	PO_Date	PO_Type	Company	PO_Description	PO_Status	PM	PM_Accepted_At	PM_Status	Finance	Finance_Accepted_At	Finance_Status	Payment

Showing 0 to 0 of 0 entries Previous Next

JM PO Management Sales Management Home > Management Tool > Sales Management > PO Management

Project :

Import PO

No file chosen

Show 10 entries

No	Project	ProjectCode	PO_No	PO_Date	PO_Type	Company	PO_Description	PO_Status	PM	PM_Accepted_At	PM_Status	Finance	Finance_Accepted_At	Finance_Status	Payment

Showing 0 to 0 of 0 entries Previous Next

- To insert a new PO click **New PO**, then a new row will be inserted automatically
- Fill in all those details

Show 10 entries

No	Project	ProjectCode	PO_No	PO_Date	PO_Type	Company	PO_Description	PO_Status	PM	PM_Accepted_At	PM_Status	Finance	Finance_Accepted_At	Finance_Status	Payment
Showing 0 to 0 of 0 entries															

Previous Next

Show 10 entries

No	Project	ProjectCode	PO_No	PO_Date	PO_Type	Company	PO_Description	PO_Status	PM	PM_Accepted_At	PM_Status	Finance	Finance_Accepted_At	Finance_Status	Payment
1										0000-00-00 00:00:00			0000-00-00 00:00:00		
Showing 1 to 1 of 1 entries															

Previous 1 Next

- To delete certain row, **select** the specific row
- Then click **Delete**

Show 10 entries

No	Project	ProjectCode	PO_No	PO_Date	PO_Type	Company	PO_Description	PO_Status	PM	PM_Accepted_At	PM_Status	Finance	Finance_Accepted_At	Finance_Status	Payment
1										0000-00-00 00:00:00			0000-00-00 00:00:00		
Showing 1 to 1 of 1 entries 1 row selected															

Previous 1 Next

- To export those details into PDF or Excel, click **Export**

Show 10 entries

No	Project	ProjectCode	PO_No	PO_Date	PO_Type	Company	PO_Description	PO_Status	PM	PM_Accepted_At	PM_Status	Finance	Finance_Accepted_At	Finance_Status	Payment
1										0000-00-00 00:00:00			0000-00-00 00:00:00		
Showing 1 to 1 of 1 entries 1 row selected															

Previous 1 Next

Show 10 entries

No	Project	ProjectCode	PO_No	PO_Date	PO_Type	Company	PO_Description	PO_Status	PM	PM_Accepted_At	PM_Status	Finance	Finance_Accepted_At	Finance_Status	Payment
1										0000-00-00 00:00:00			0000-00-00 00:00:00		
Showing 1 to 1 of 1 entries 1 row selected															

Previous 1 Next

➤ PO SUMMARY

1. Click **Sales Management > PO Summary**

The screenshot shows the JM Admin interface for the PO Summary page. The top navigation bar includes the JM logo and a user profile for JM Admin. The breadcrumb trail is Home > Sales Management > PO Summary. The main content area features a date range picker set to '01-Jan-2017 - 30-Jun-2017' and a green 'Refresh' button. Below this, there are three sections, each with an 'Export' button and a message 'No data available in table':

- PO Receive and Issue
- PO Receive and Issue Breakdown by Company
- PO Receive and Issue Breakdown by Job Type

2. Filter the date from the Date Range Picker. Click **Refresh** button to retrieve from the filtered date.

This screenshot is similar to the previous one, but with a red rectangular box highlighting the date range picker and the 'Refresh' button. The date range picker is set to '01-Jan-2017 - 30-Jun-2017'.

3. There are four types of summary:

- PO Receive and Issue

PO Receive and Issue

Export

No data available in table

- PO Receive and Issue Breakdown by Company

PO Receive and Issue Breakdown by Company

Export

No data available in table

- PO Receive and Issue Breakdown by Job Type

PO Receive and Issue Breakdown by Job Type

Export

No data available in table

- Job Pending PO

Job Pending PO

Export

	Project_Name	Pending
1		501
2	MY_Huawei_Celcom_Southern_Reforming	20
3	MY_Huawei_Maxis_KV_Node B	1
4	MY_Huawei_Maxis_NR_Node B	1

4. Click **Export** to export information into PDF, Excel or CSV.

Export

Excel
CSV
PDF

	Project_Name	Pending
		501
	MY_Huawei_Celcom_Southern_Reforming	20
	MY_Huawei_Maxis_KV_Node B	1
4	MY_Huawei_Maxis_NR_Node B	1

➤ INVOICE MANAGEMENT

1. Click **Sales Management > Invoice Management**

JM Admin

Invoice Management Sales Management

Home Management Tool Sales Management Invoice Management

New Delete Export Search:

No	Invoice_No	Project_Name	Company	Invoice_Type	Invoice_Date	Invoice_Description	Invoice_Amount	Invoice_Status
1	test1	MY_Huawei_Maxis_NR_Node B			17-Apr-2017		NaN	

Showing 1 to 1 of 1 entries Previous 1 Next

- Click **New** to insert a new row
- Then fill in those details and click **Create**

New Delete Export Search:

No	Invoice_No	Project_Name	Company	Invoice_Type	Invoice_Date	Invoice_Description	Invoice_Amount	Invoice_Status
1	test1	MY_Huawei_Maxis_NR_Node B			17-Apr-2017		NaN	

Showing 1 to 1 of 1 entries Previous 1 Next

JM Admin

Invoice Management s

New Delete Export Search:

Create new entry

Invoice No:

Project Name:

Company:

Invoice Type:

Invoice Date:

Invoice Amount:

Invoice Description:

Invoice Status:

Create

- Click **View** to view the details and it will be redirected to another page.

New Delete Export Search:

No	Invoice_No	Project_Name	Company	Invoice_Type	Invoice_Date	Invoice_Description	Invoice_Amount	Invoice_Status
1	test1	MY_Huawei_Maxis_NR_Node B			17-Apr-2017		NaN	

Showing 1 to 1 of 1 entries Previous 1 Next

5. Click **Upload** to upload files in PDF, JPEG or PNG

JM JM Admin

Invoice Details Invoice Management Home > Management Tool > HR Management > Invoice Management > Invoice Details

Invoice No : test1

Invoice Date : 17-Apr-2017

Invoice Type :

Description :

Total Amount : RM

Status :

Attachment [PNG, JPG and PDF file only] Choose Files No file chosen

Upload

6. To delete, select the row then click **Delete**

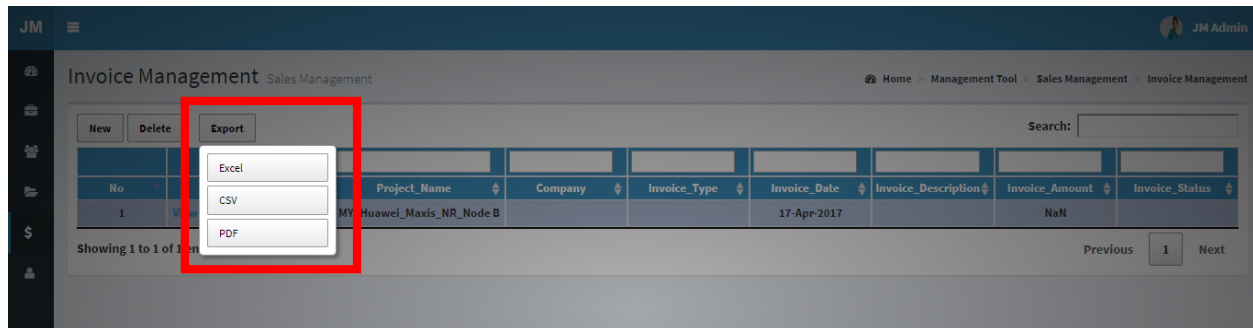
Invoice Management Sales Management Home > Management Tool > Sales Management > Invoice Management

New Delete Export Search:

No	Invoice_No	Project_Name	Company	Invoice_Type	Invoice_Date	Invoice_Description	Invoice_Amount	Invoice_Status
1	test1	MY_Huawei_Maxis_NR_Node B			17-Apr-2017		NaN	

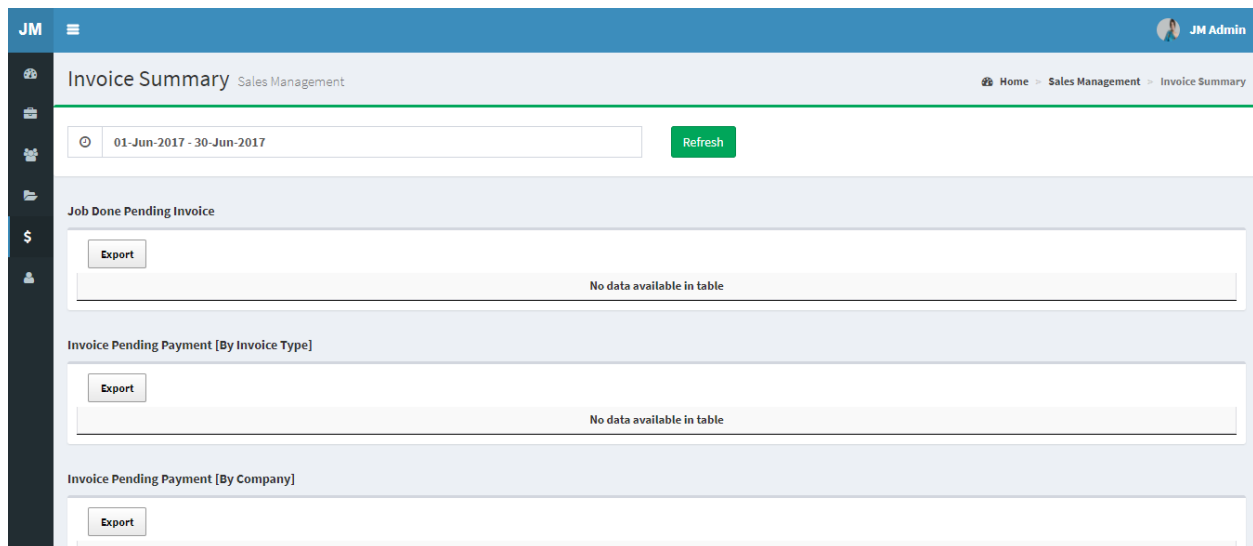
Showing 1 to 1 of 1 entries 1 row selected Previous 1 Next

7. Click **Export** to export information into PDF, Excel or CSV

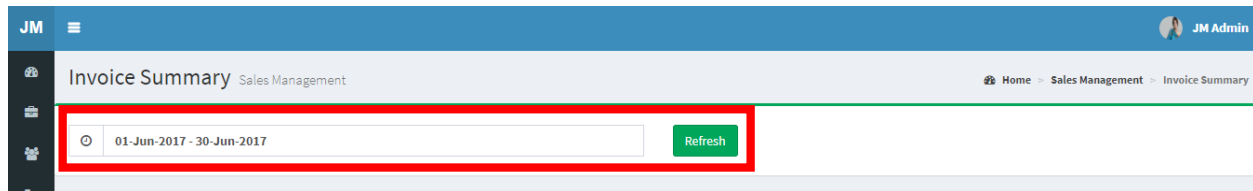


➤ INVOICE SUMMARY

1. Click **Sales Management > Invoice Summary**



2. Filter the date from the Date Range Picker. Click **Refresh** button to retrieve from the filtered date.

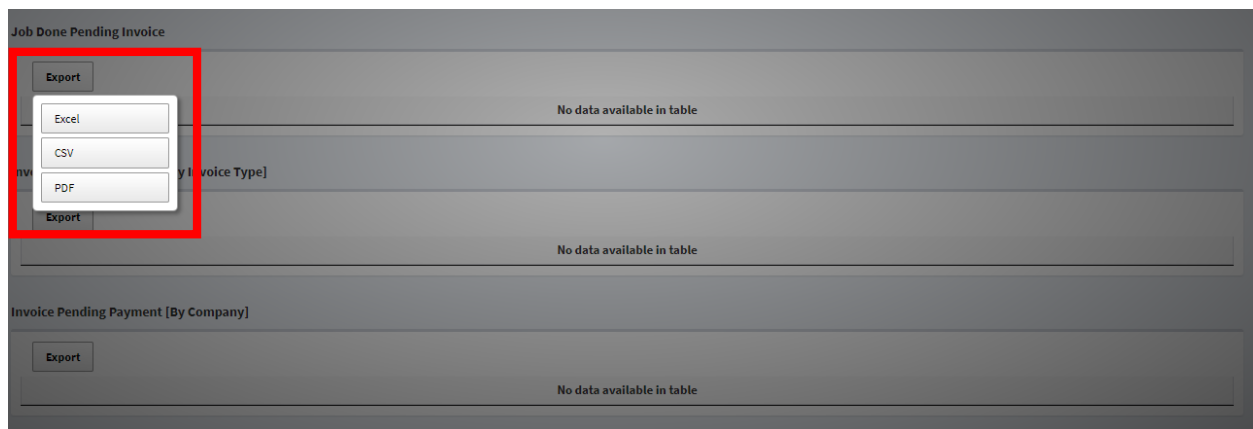


3. There are three type of summary info:

- **Job Done Pending Invoice**
- **Invoice Pending Payment [By Invoice Type]**
- **Invoice Pending Payment [By Company]**

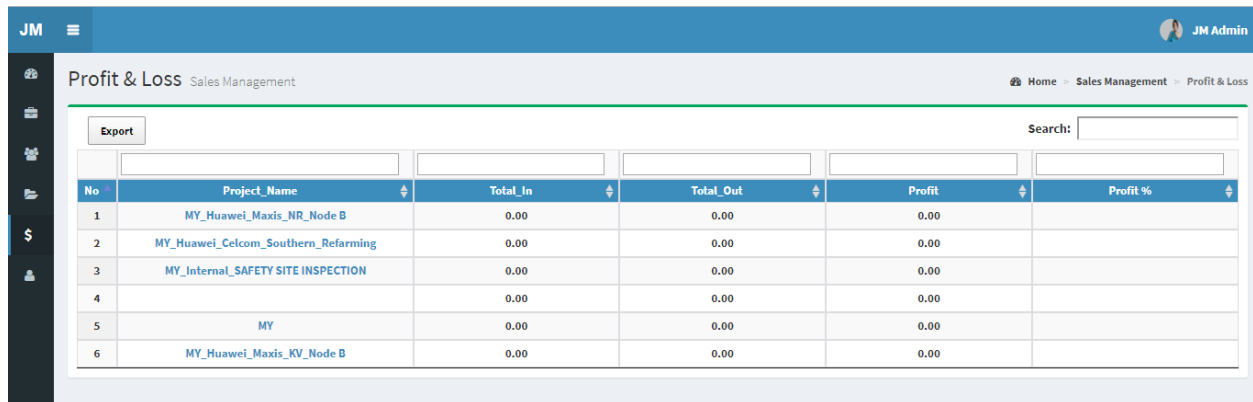


4. Click Export to export details into PDF, Excel or CSV.



➤ **PROFIT & LOSS**

1. Click **Sales Management > Profit & Loss**
2. List of projects will be there



Profit & Loss Sales Management

Home Sales Management Profit & Loss

Export Search:

No	Project Name	Total_In	Total_Out	Profit	Profit %
1	MY_Huawei_Maxis_NR_Node B	0.00	0.00	0.00	
2	MY_Huawei_Celcom_Southern_Reforming	0.00	0.00	0.00	
3	MY_Internal_SAFETY SITE INSPECTION	0.00	0.00	0.00	
4		0.00	0.00	0.00	
5	MY	0.00	0.00	0.00	
6	MY_Huawei_Maxis_KV_Node B	0.00	0.00	0.00	

3. To export those details into PDF, Excel or CSV, click **Export**



Profit & Loss Sales Management

Home Sales Management Profit & Loss

Export Search:

No	Project Name	Total_In	Total_Out	Profit	Profit %
1	MY_Huawei_Maxis_NR_Node B	0.00	0.00	0.00	
2	MY_Huawei_Celcom_Southern_Reforming	0.00	0.00	0.00	
3	MY_Internal_SAFETY SITE INSPECTION	0.00	0.00	0.00	
4		0.00	0.00	0.00	
5	MY	0.00	0.00	0.00	
6	MY_Huawei_Maxis_KV_Node B	0.00	0.00	0.00	

4. Click on the **project name** to view in more details of the profit and loss for the specific project, it will be redirected to another page

Profit & Loss Sales Management

Export

No	Project_Name
1	MY_Huawei_Maxis_NR_Node B
2	MY_Huawei_Celcom_Southern_Reforming
3	MY_Internal_SAFETY SITE INSPECTION
4	
5	MY
6	MY_Huawei_Maxis_KV_Node B

- There will two tabs option available: **Project Code** and **Work Item ID**
- Click on each tab to view details accordingly

JM JM Admin

MY_Huawei_Maxis_NR_Node B Profit & Loss Sales Management

Project Code Work Item ID

Export Show 10 entries

No	Project_Code	Site_ID	Site_Name	Total_In	Total_Out	Profit	Profit %
1				0.00	0.00	0.00	

Showing 1 to 1 of 1 entries

Previous 1 Next

- Click **Export** to export details into PDF, Excel or CSV.

JM

MY_Huawei_Maxis_NR_Node B Profit & Loss

Sales Management

Project Code

Work Item ID

Export

Show 10 entries

Excel

CSV

PDF

Site_ID	Site_Name
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