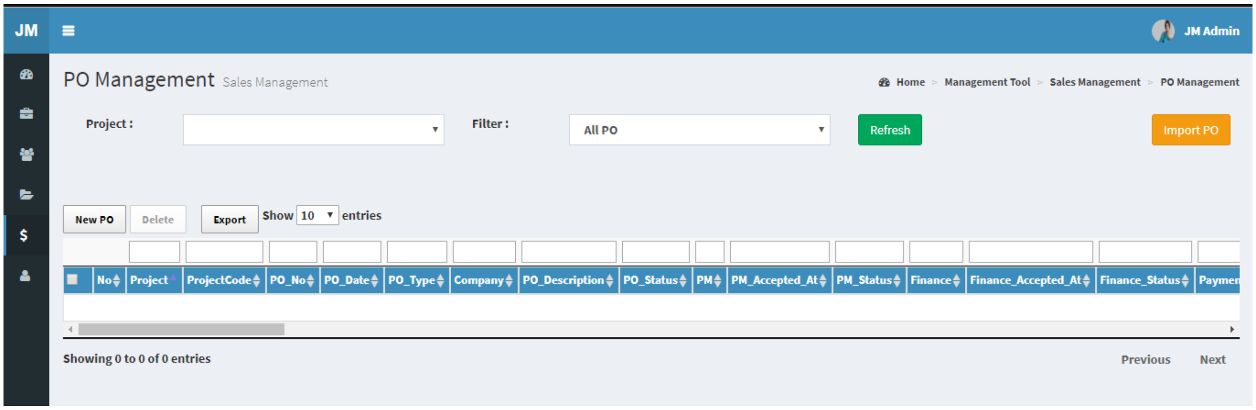
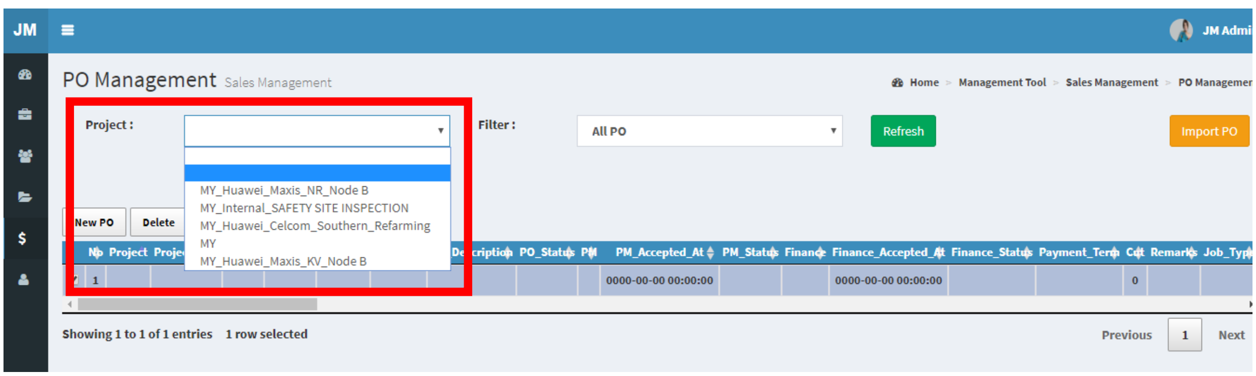
Sales Management User Guide

➢ PO MANAGEMENT

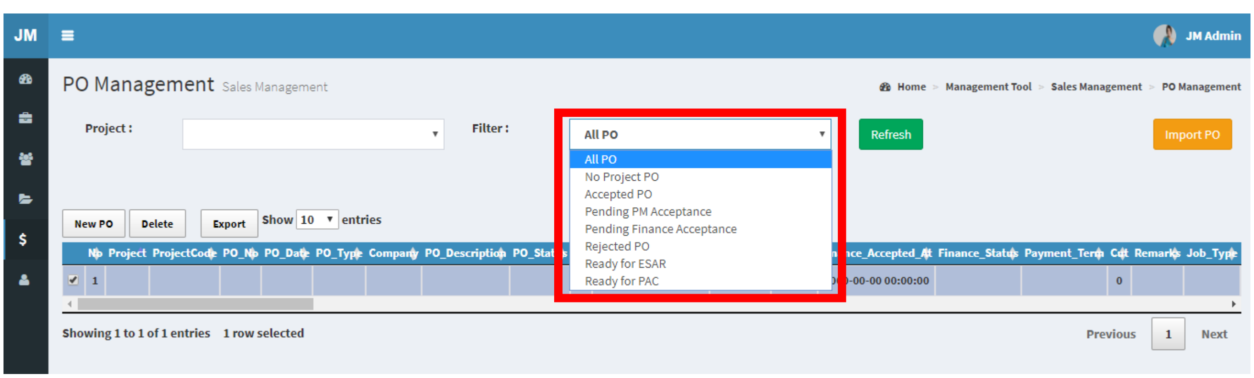
1. Click **Sales Management** > **PO Management**



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

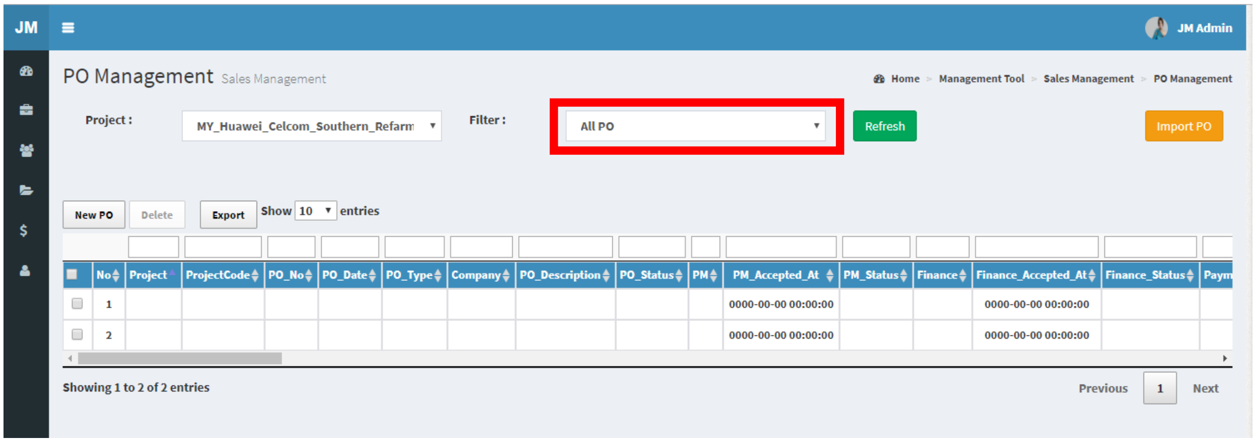


3. You can even **filter** the view of details according to options given, then click **Refresh**.



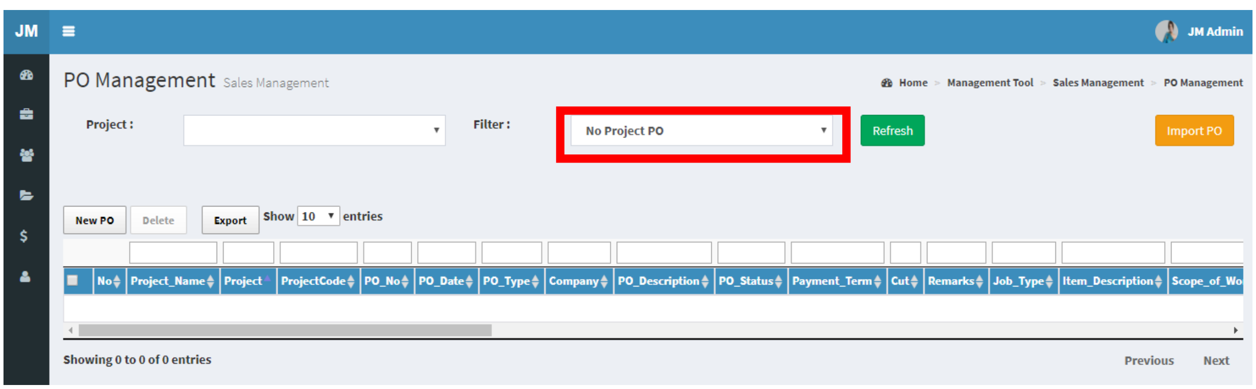
- **All PO:**

a) Shows all the details for all the PO
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



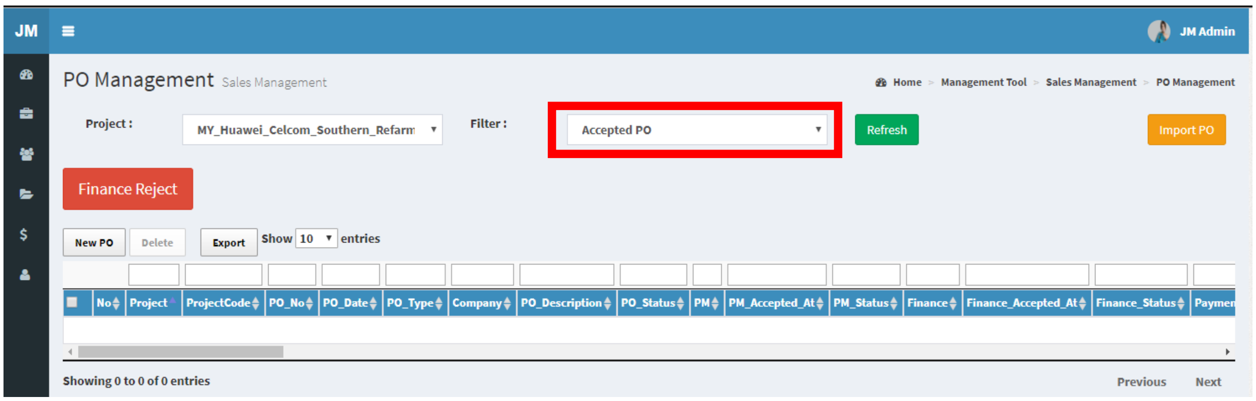
- **No Project PO:**

a) Shows the details of PO that haven't been assigned to any projects
b) **Project Name** 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



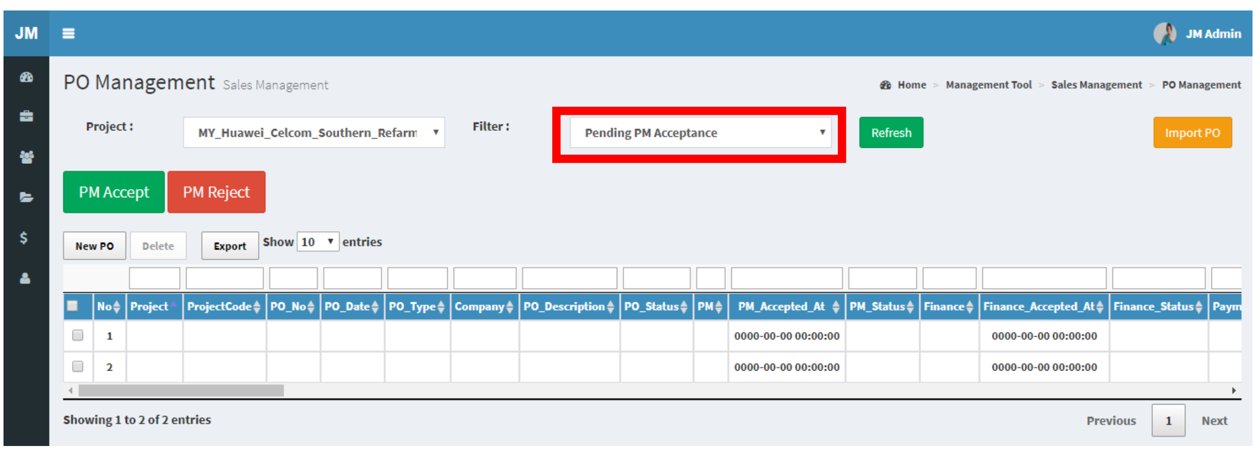
- **Accepted PO**

a) PM_Accepted and Finance_Accepted Column will be filled
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) Select the specific row and click **Finance Reject** button to reject the selected PO



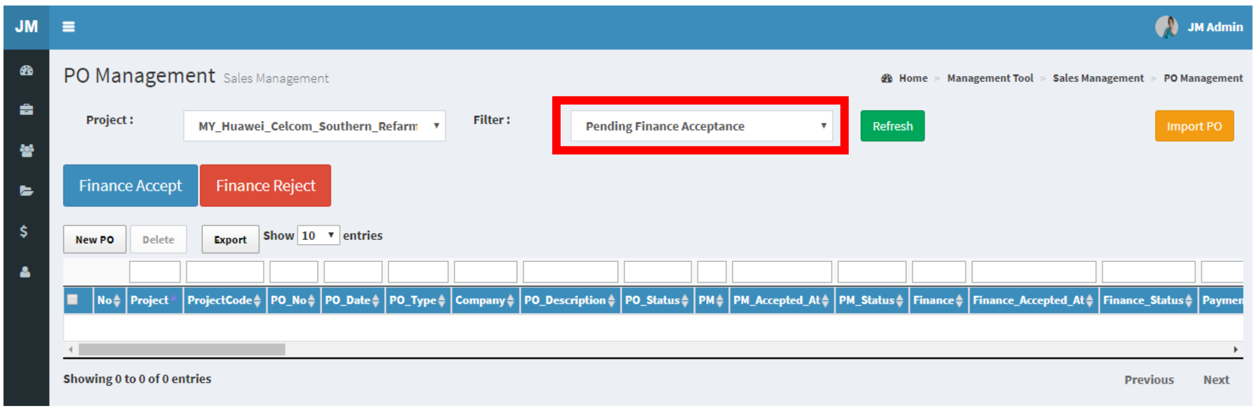
- **Pending PM Acceptance**

a) **PM_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 **PM Accept** button to accept selected PO
f) Click **PM Reject** button to reject selected PO



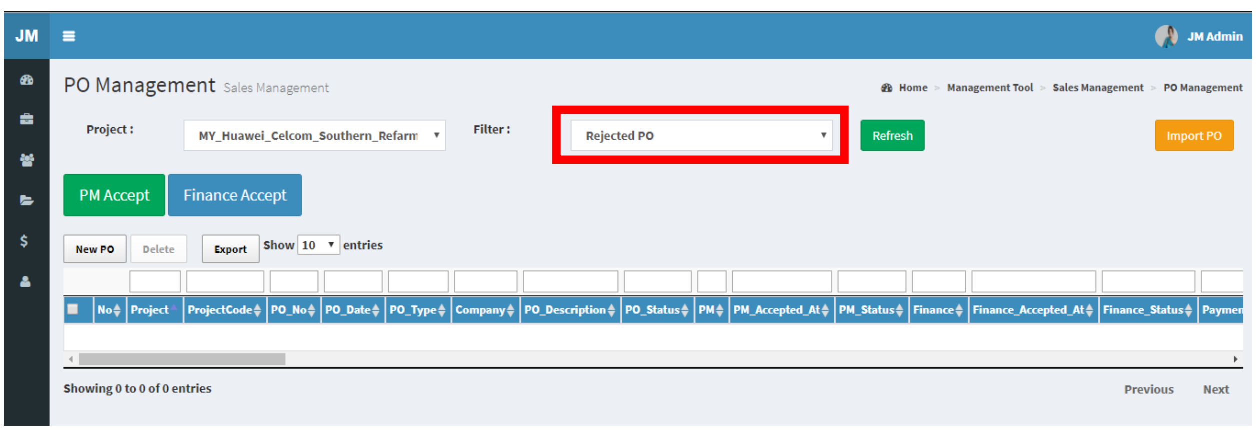
- **Pending Finance Acceptance**

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



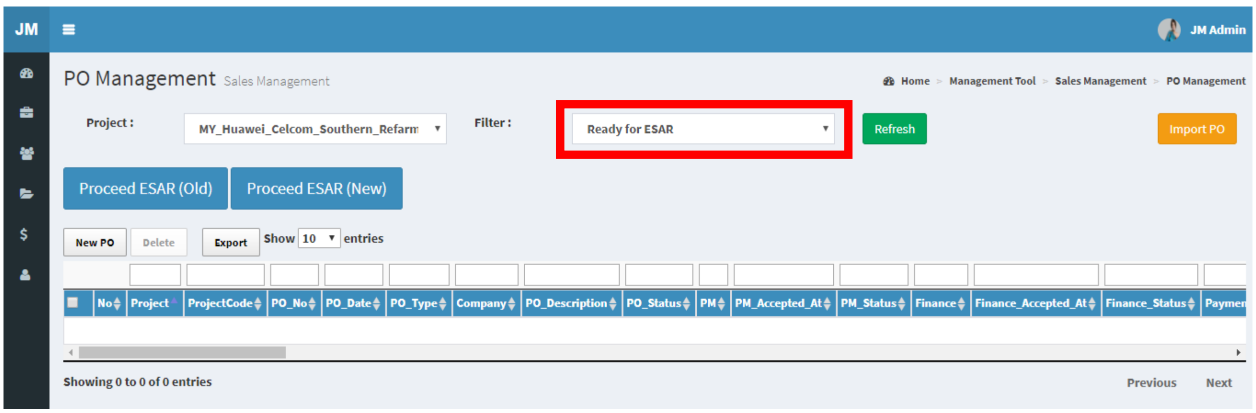
- **Rejected PO**

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



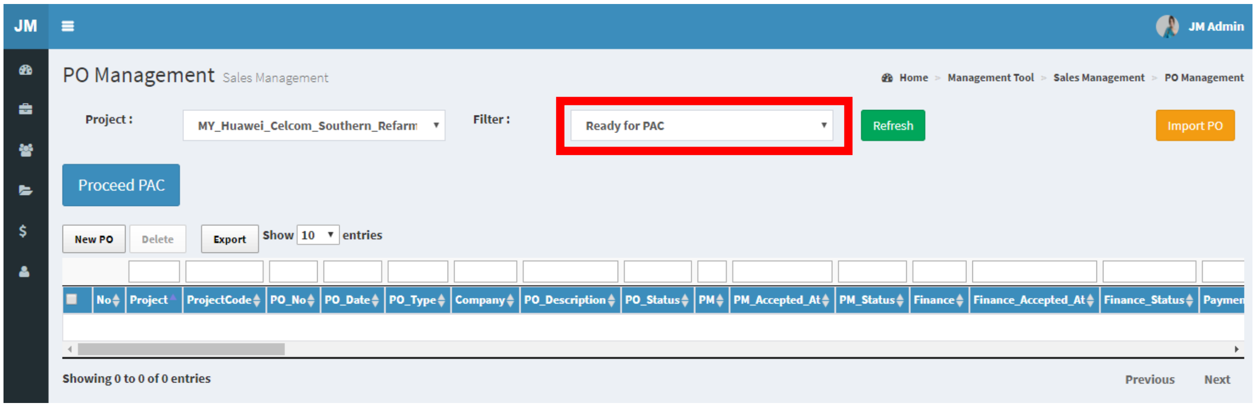
- **Ready for ESAR**

a) **First-Fifth Cut_Complated_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

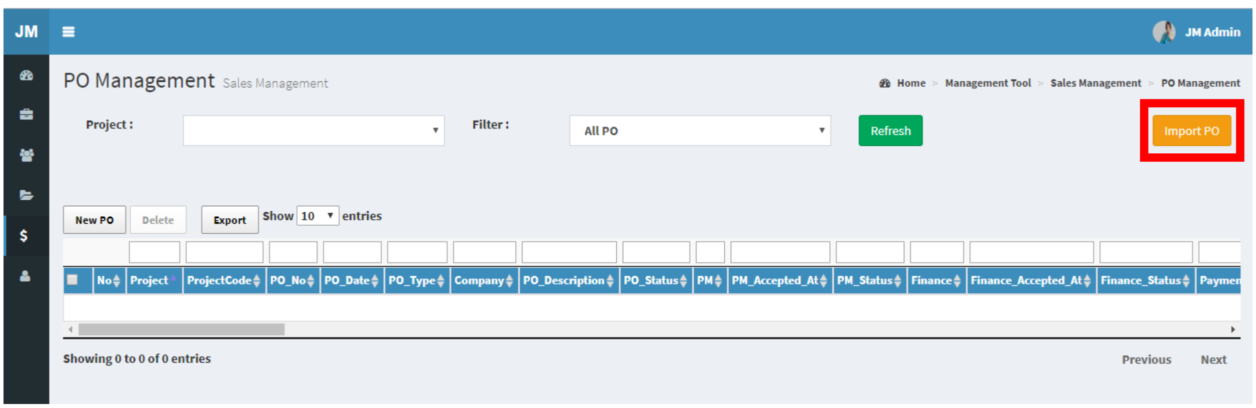


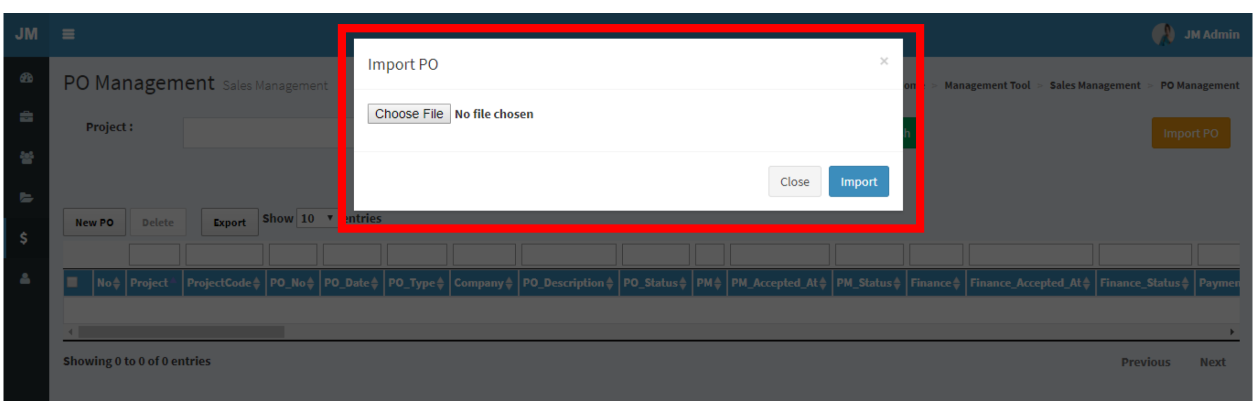
- **Ready for PAC**

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

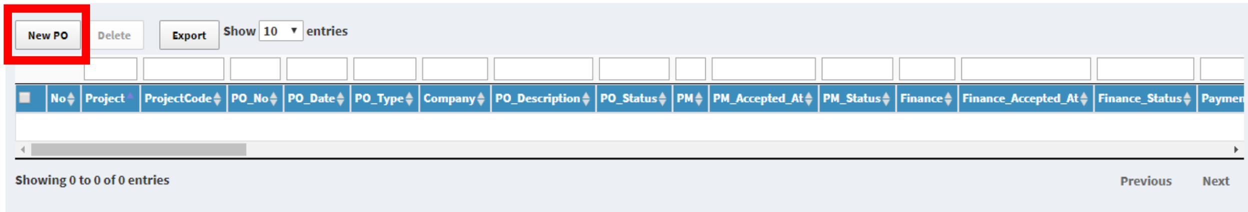


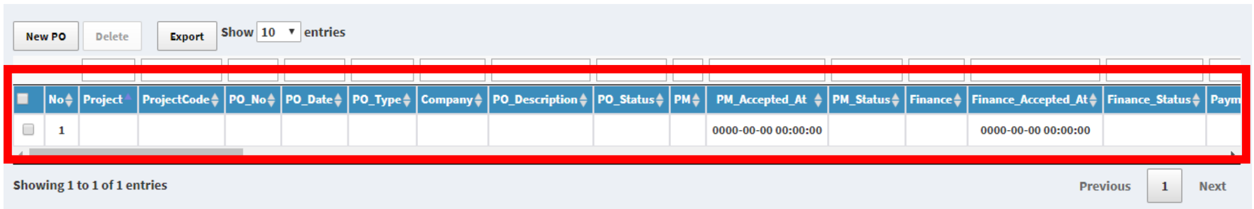
4. Click **Import PO** to import details from other files.



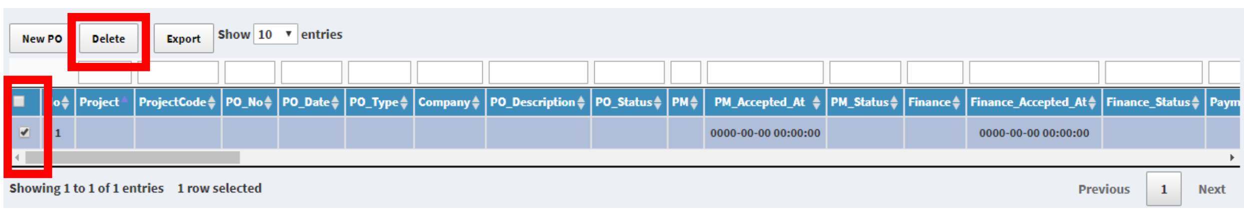


5. To insert a new PO click **New PO**, then a new row will be inserted automatically
6. Fill in all those details

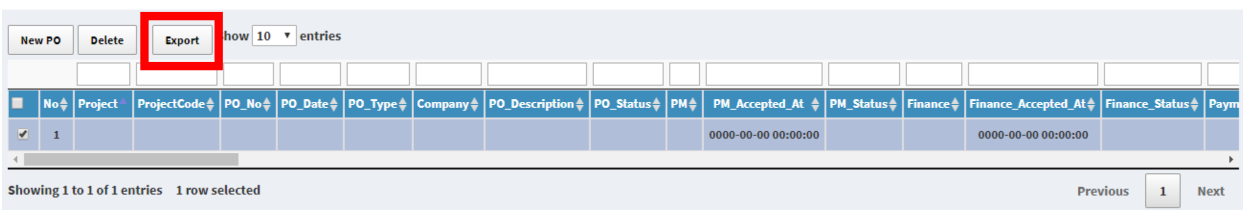


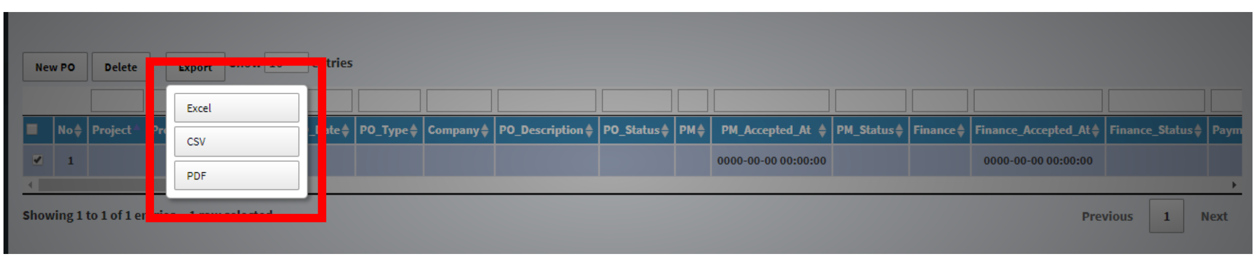


7. To delete certain row, **select** the specific row
8. Then click **Delete**



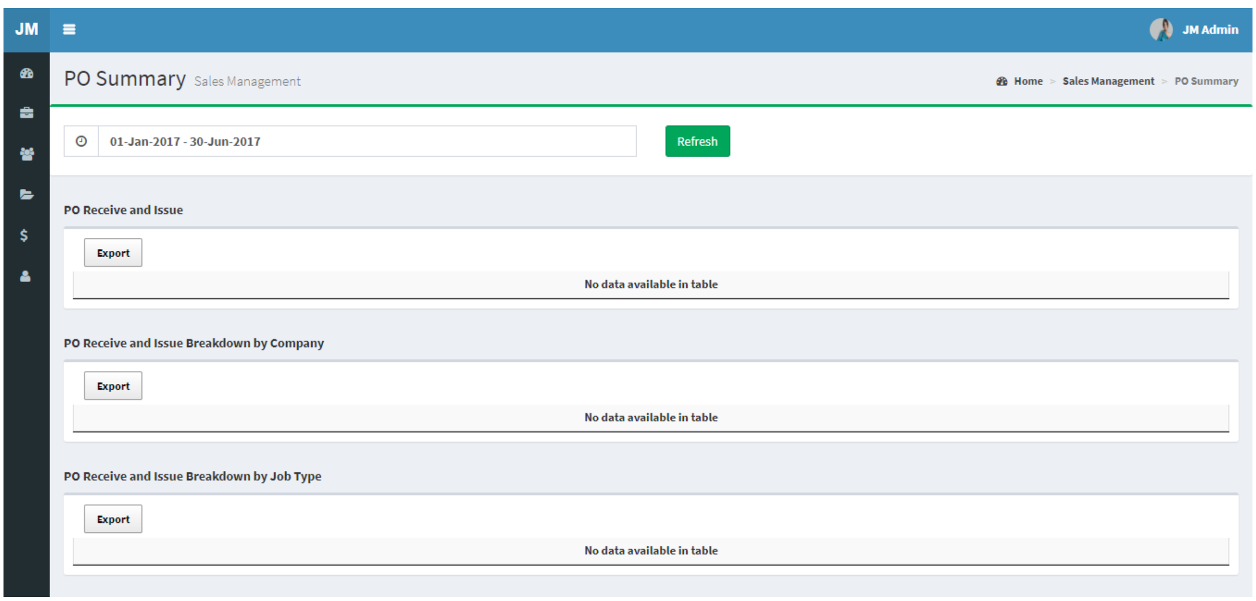
9. To export those details into PDF or Excel, click **Export**



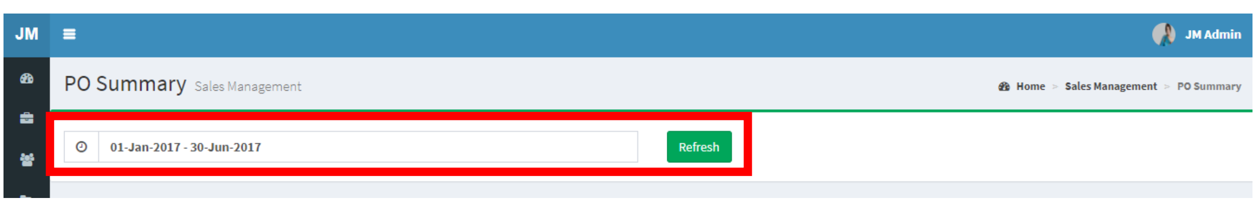


➢ PO SUMMARY

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

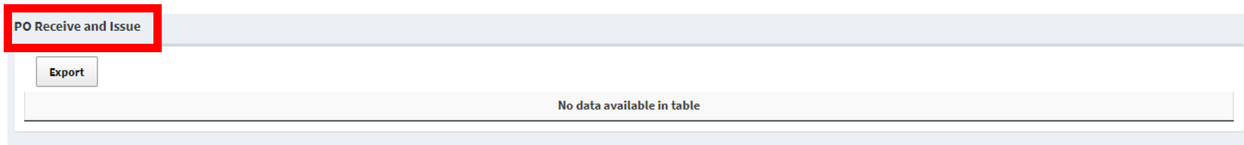


2. Filter the date from the Date Range Picker. Click **Refresh** button to retrieve from the filtered date.

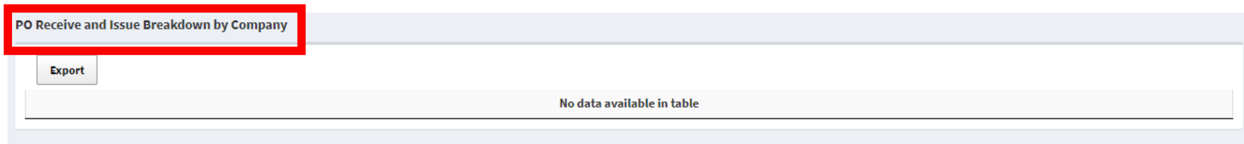


3. There are four types of summary:

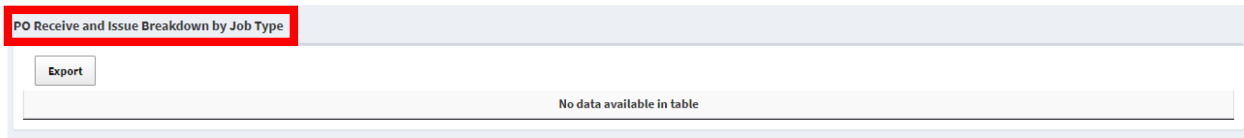
- **PO Receive and Issue**



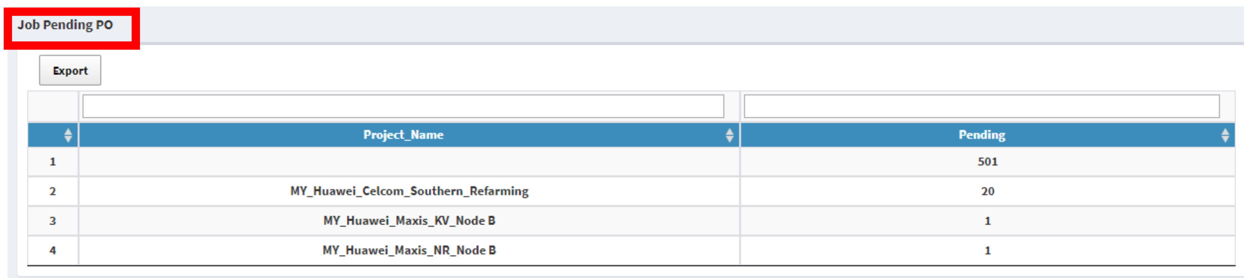
- **PO Receive and Issue Breakdown by Company**



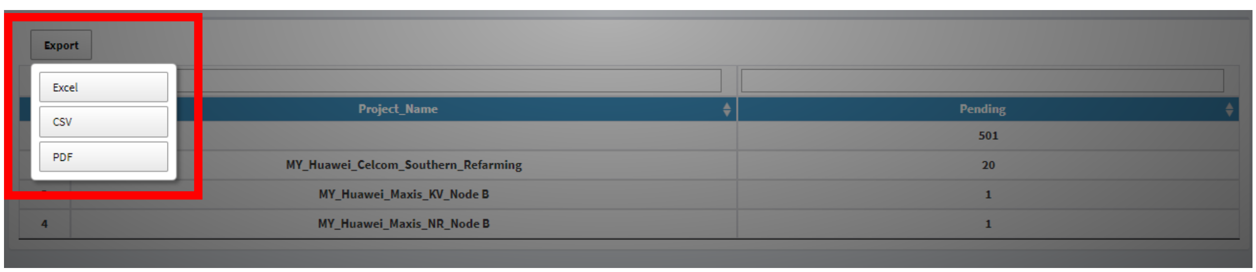
- **PO Receive and Issue Breakdown by Job Type**



- **Job Pending PO**

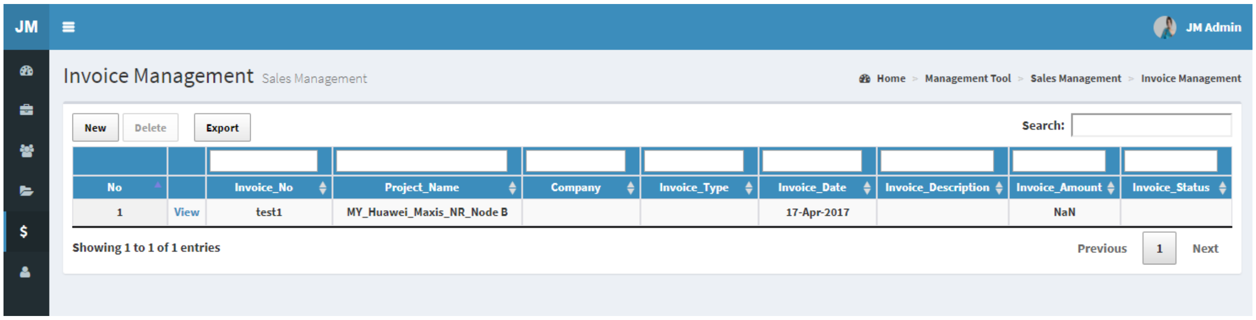


4. Click **Export** to export information into PDF, Excel or CSV.

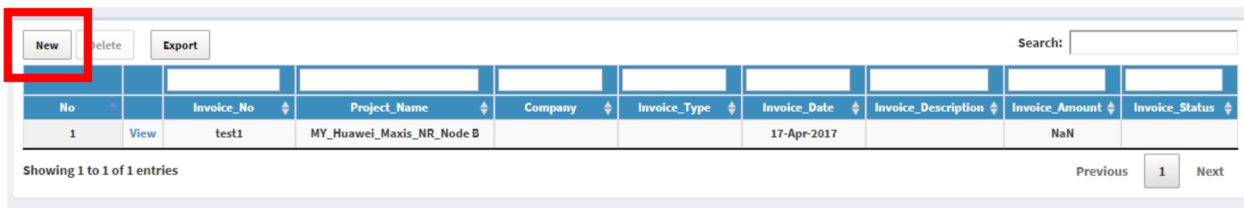


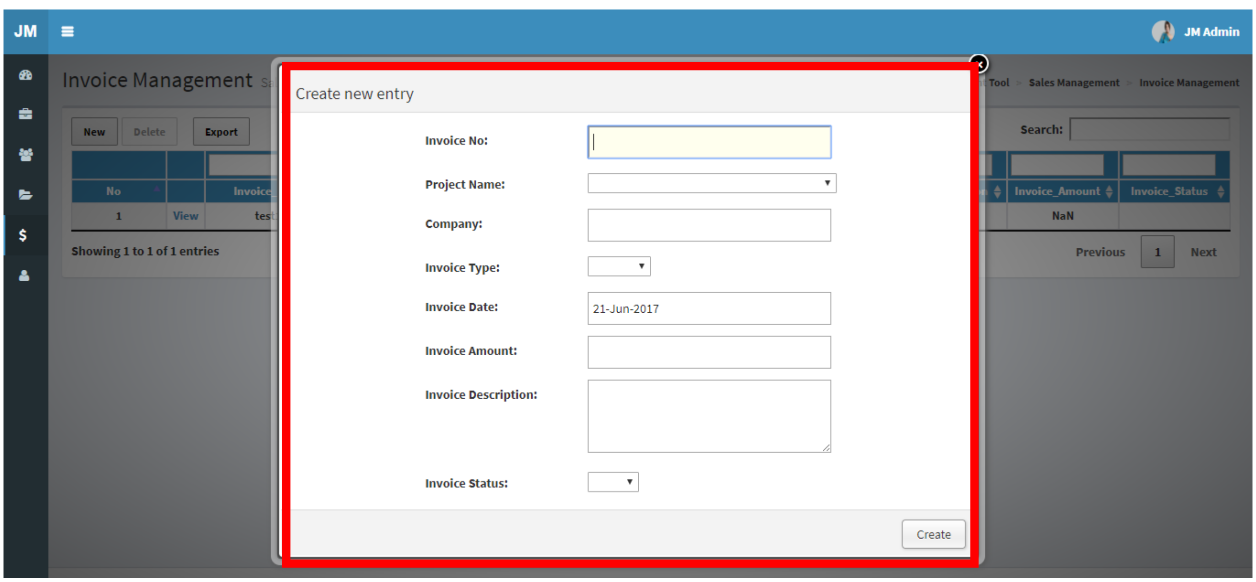
➢ INVOICE MANAGEMENT

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

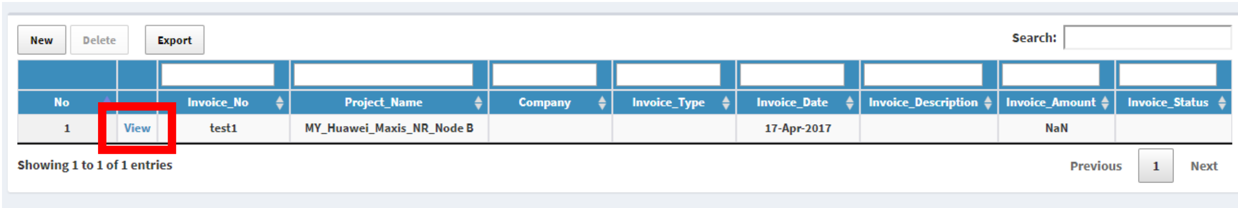


2. Click **New** to insert a new row
3. Then fill in those details and click **Create**

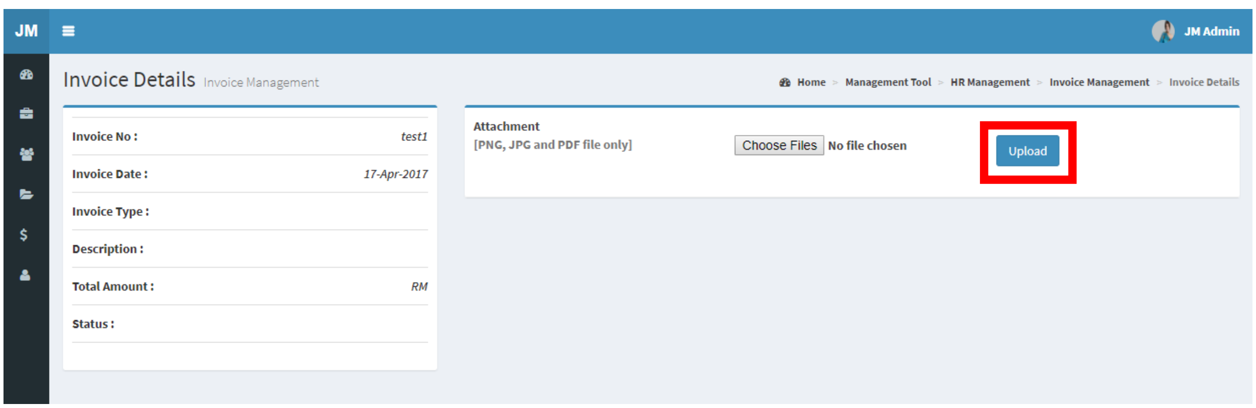




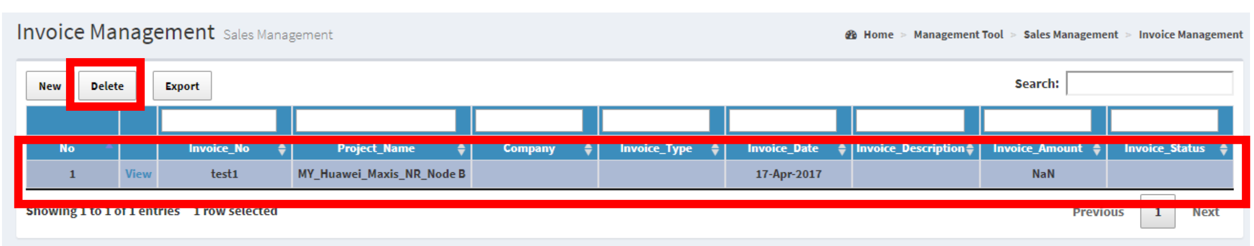
4. Click **View** to view the details and it will be redirected to another page.



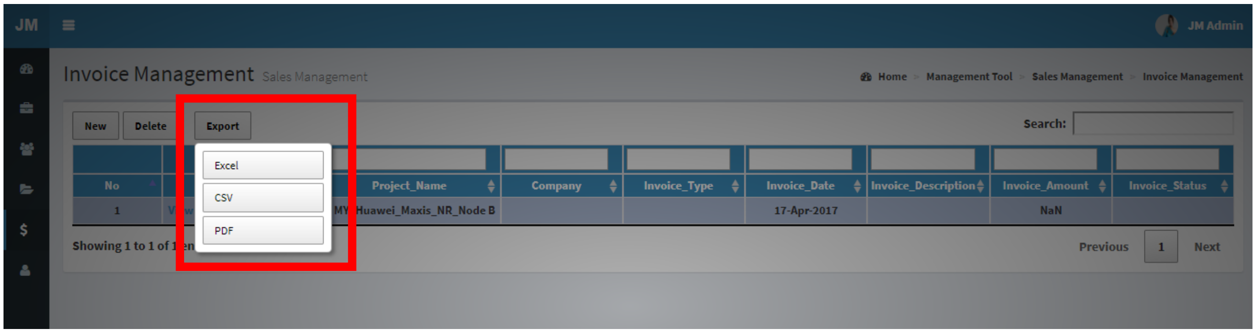
5. Click **Upload** to upload files in PDF, JPEG or PNG



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

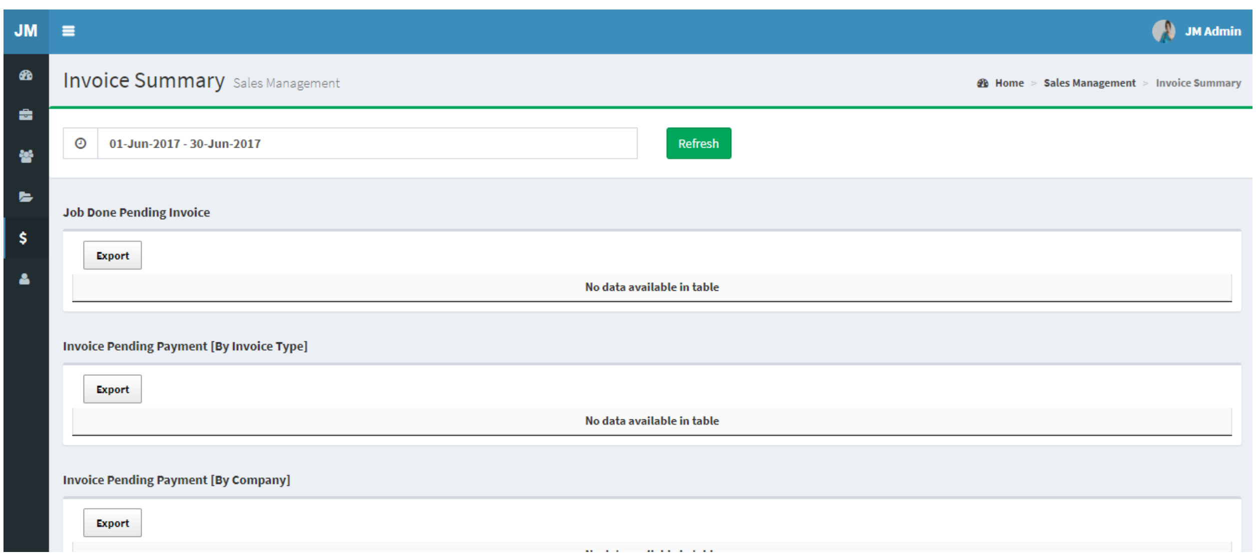


7. Click **Export** to export information into PDF, Excel or CSV

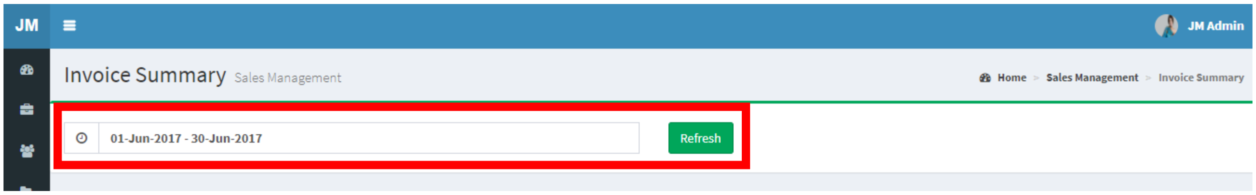


➢ INVOICE SUMMARY

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

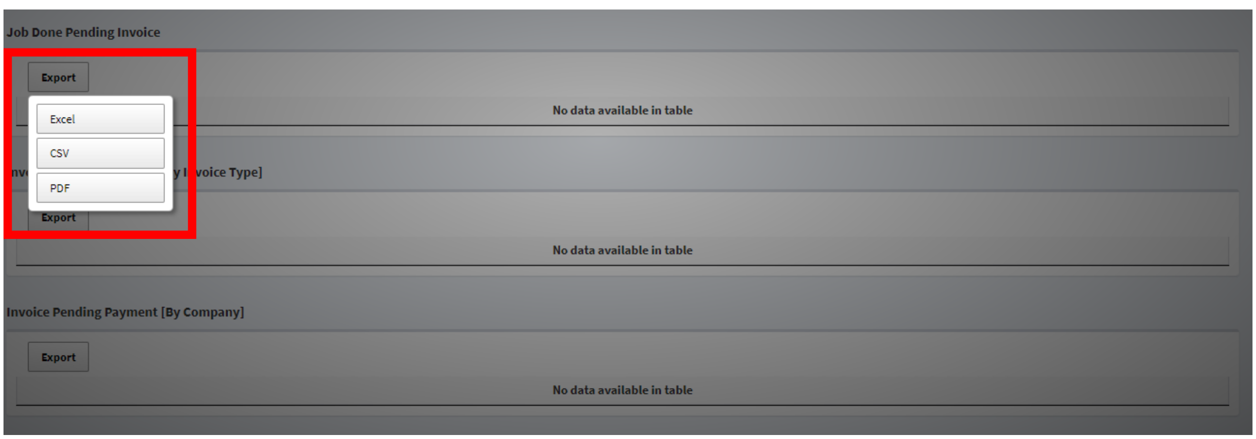


2. Filter the date from the Date Range Picker. Click **Refresh** button to retrieve from the filtered date.



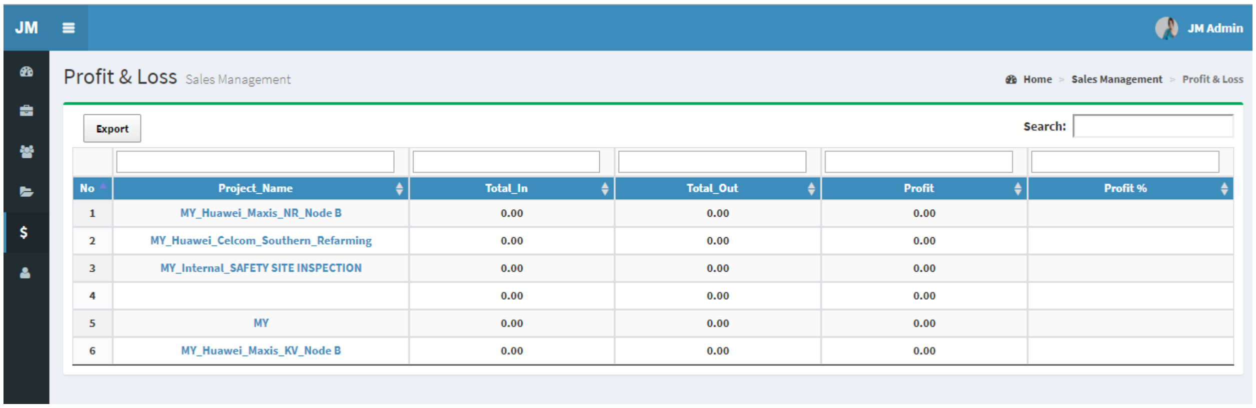
3. There are three type of summary info:
   - **Job Done Pending Invoice**
   - **Invoice Pending Payment [By Invoice Type]**
   - **Invoice Pending Payment [By Company]**

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

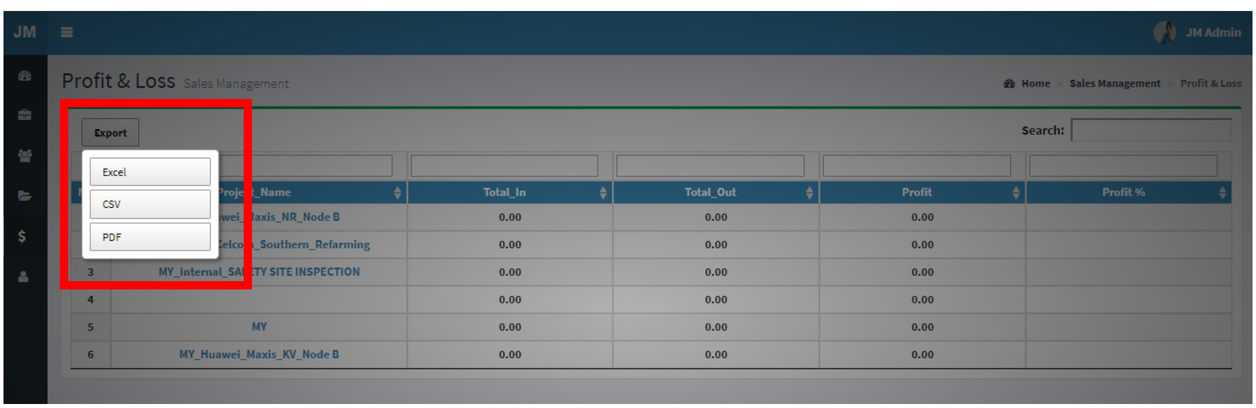


➢ PROFIT & LOSS

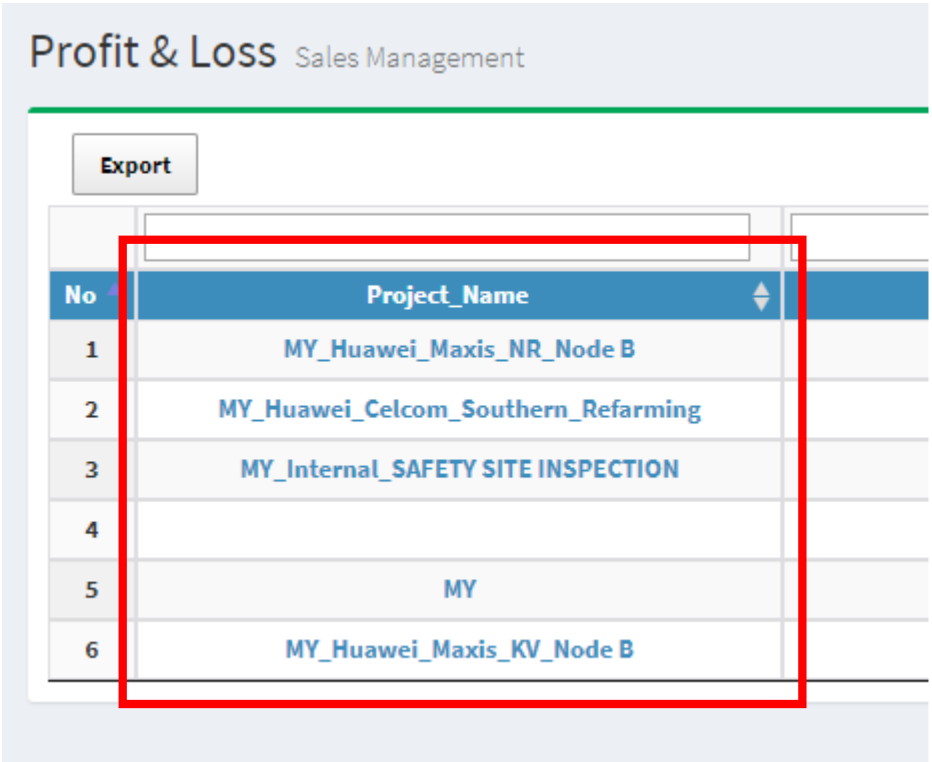
1. Click **Sales Management** > **Profit & Loss**
2. List of projects will be there



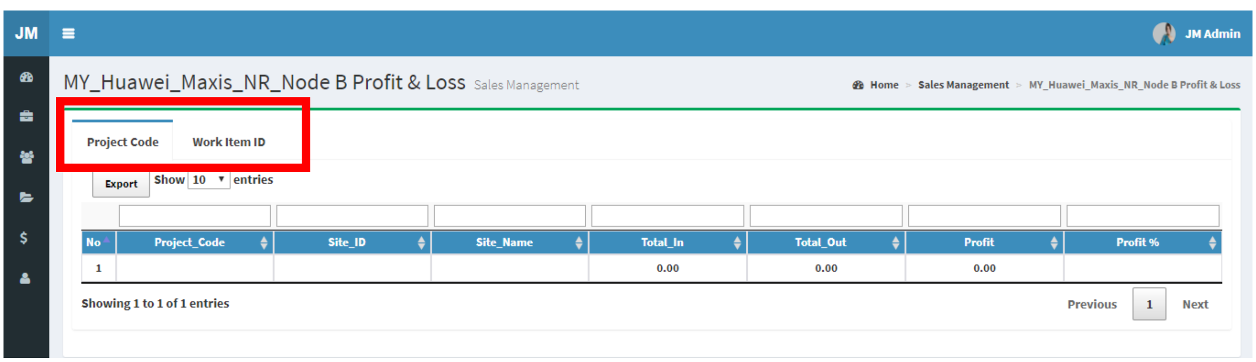
3. To export those details into PDF, Excel or CSV, click **Export**



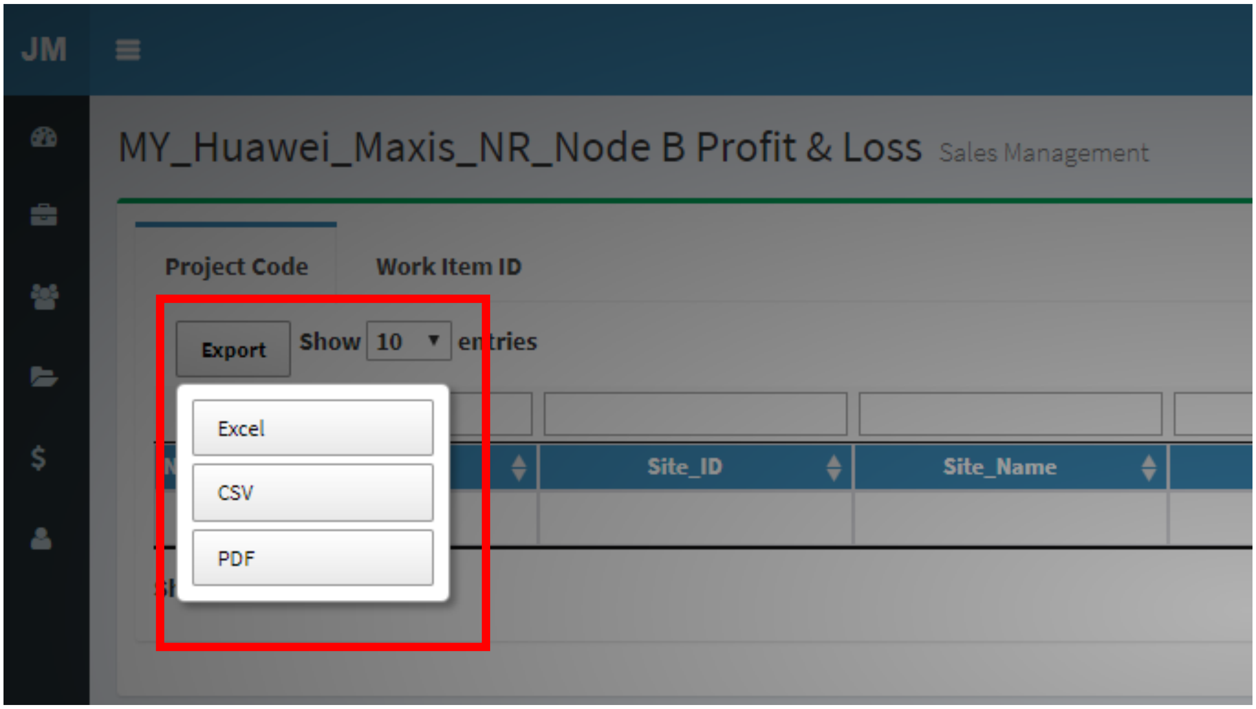
4. Click on the **project name** to view in more details of the profit and loss for the specific project, it will be redirected to another page



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



7. 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