Distribution Software - Nineleaves

Admin Dashboard

Admin Scope Of Work

Minibig Technologies

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12. User Management
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    - View

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POINTS:

- Database ids will be 6 digits
- Everything will have an ID and the IDs should be mentioned which are used in database

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Admin Login → Email → Password

## Dashboard:

**Quick Actions:**

- Add product
- Add distributor
- Assign sales to distributor
- Add sales head
- Add team member

**Admin can see the dashboard with statistics:**

- Total sales heads
- Total Sales team members
- Total distributors
- Total Orders To Nine leaves
- Total orders to distributors
- Total Delivered orders
- Total Pending orders
- Total Products
- Total Dispatched Orders
- Total Sales
- Sales Of The Month
- Receivables
- Collections
- Total Targets
- Achieved Targets
- Pending orders with nine leaves
- Pending orders with distributors
- Expenses of the month

## Product Management

### Category will be 2 levels

Click on category view list

Top search bar

Top add category bar

Below there will be table

With select all button for checklist

Select will show action bars above as DD

- Activate
- Deactivate
- Delete

| s.no | checklist | Title | Description | status | Edited By | Actions |
|---|---|---|---|---|---|---|
| | | Clickable title to see the subcategories page | TT | Active<br>Deactivated | Name of manager | Add subcategory<br>Delete<br>Edit<br>Activate<br>Deactivate<br>View subcategories |

| | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | |

Every action item will have a function

| Actions | What it will do? |
|---|---|
| Add subcategory | It will open a new page and will show options to add the subcategory |
| Delete | It will delete the entry after confirmation popup |
| Edit | It will open a new page for edit |
| Activate | Option |
| Deactivate | Option |
| View subcategories | Click will open the page to view sub categories. |

View subcategories page will have these options

Top search bar

Top add category bar

Below there will be table

With select all button for checklist

Select will show action bars above as DD

- Activate
- Deactivate
- Delete

| s.no | checklist | Title | Main category | Description | status | Edited By | Actions |
|---|---|---|---|---|---|---|---|
| | | Clickable title to see the subcategories page | | TT | Active<br>Deactivated | Name of manager | Delete<br>Edit<br>Activate<br>Deactivate |

Every action item will have a function

| Actions | What it will do? |
|---|---|
| Delete | It will delete the entry after confirmation popup |
| Edit | It will open a new page for edit |
| Activate | Option |
| Deactivate | Option |

ADD Category Page

- Fields
  - Title
  - Description
  - Submit

Add subcategory page

- Fields
  - Title
  - Description
  - Parent category
  - submit

# Products

**Top area will have**

- filters
- add a product option

**Filters**

- search area
- product id filter

- category filter
- subcategory filter
- price wise filter

There will be table also

| Checklist | S. No | Pictures | Product Code | Product Title | Category | Sub category | Price Per Carton | Pieces Per Carton | Added By | Edited By | Actions |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | View (View will open a popup to show pictures) | | | | | | | | | Edit Deactivate Activate |
| | | | | | | | | | | | |

**Add New Product:**

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* This option will have these fields

- Title of product
- Product Code
- Select category
- Select Sub Category

- Pieces per Carton
- Carton Price in PKR
- Attach Pictures → Multi selection max 3 pictures

- **Submit Button**

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## Distributors

**View**

- A search option will be present on top of the table
- Add New Option
- Select all option and checklist
- Filters will be present:
  a. Distributor ID
  b. Area
  c. City

| First Name | Middle Name | Last Name | Cell # | Landline # | CNIC # | Area, City, address | Email | Business name | Username | Password | Store address | Actions |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | Edit<br>Delete |

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | Activate<br>Deactivate |

Add Distributor

It will show these fields

- First Name
- Middle Name
- Last Name
- Cell
- Landline
- CNIC
- Area City Address
- Email
- Business Name
- Store Address
- Username
- Password

SUBMIT BUTTON

## Sales Head

**View**

- A search option will be present on top of the table
- Add New Option
- Select all option and checklist
- Filters will be present:

  d. Sales Head ID
  e. Area
  f. City

| First Name | Middle Name | Last Name | Cell # | ID | Landline # | CNIC # | Area, City, address | Email | Username | Password | Team | Actions |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | **View** | Edit<br>Delete<br>Activate<br>Deactivate<br>**Distributors** |

**View Option under Team**

- It will open the page of team members which are under the sales head, by using the filter (Team under the sales head section). It will only show the team under that sales head

**Distributors Option Under Action**

- Click →it will open a page or popup and show the distributors he is connected with
- It will also show an assign button → click on assign button will show the list of distributors → multi select distributors with the help of search option dropdown → click on assign. Sales person will auto be assigned to the distributor.

**Add Sales Head**

It will show these fields

- First Name
- Middle Name
- Last Name
- Cell
- Landline
- CNIC
- Area,
- City,
- address

- Email
- Username
- Password

**SUBMIT BUTTON**

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## Sales Team Persons

**View**

- A search option will be present on top of the table
- Add New Option
- Select all option and checklist
- Filters will be present:

g. Sales Head ID
h. Sales Person ID
i. Area
j. City

| First Name | Middle Name | Last Name | ID | Sales Head | Cell # | Landline # | CNIC # | Area, City, address | Email | Actions |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | Edit |

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | Delete<br>Activate<br>Deactivate<br>**Targets** |

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**TARGETS Option under Team**

- It will open a page which will have
    - A filter of date On top → from date -- to date, to view the targets date wise
    - On top there will be add target option also
        - Click on this option will show another page
            - This page will show the fields
                - Sales team member ID
                - Sales team member First name
                - Sales team member Last name
                - Select date – From Date: To Date (if on that date the sales team person already has target it will not be selected by admin. Admin can assign the target for the date on which there is no target for sales team person)
                - A typing area to write the Sales Amount Target
                - Submit button → will route to main page of targets
    - There will be a table also below to show all the targets history with pagination

| s.no | Target amount assigned | Assigned by | Assigned By (ID) | Designation | Date | Achieved target | Missed target | Actions |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | Edit<br>Delete |
| | | If assigned by sales head or admin or manager etc show the name with ID and designation | If assigned by sales head or admin or manager etc show the name with ID and designation | If assigned by sales head or admin or manager etc show the name with ID and designation | | | | If assigned by admin cannot be edited or deleted by sales head<br><br>If assigned by sales head, it can be edited or deleted by admin |

- Per page 10 entries will appear
- On top there will be 3 boxes also with icons and title
  - First  will show the Total Target till date assigned with heading of **TOTAL TARGETS**
  - Second will show the achieved targets till date with the heading of **ACHIEVED TARGETS**

- Third box will show the missed target with the heading of **Missed Target** and it will show the amount (Total target – Achieved target)

**Add Sales Team Person**

It will show these fields

- First Name
- Middle Name
- Last Name
- Cell
- Landline
- CNIC
- Area,
- City,
- address
- Email
- Sales Head

**SUBMIT BUTTON**

## Targets Management

It will open a page which will have top options:

- Select all option – shows the actions options except the edit option
- Search option
- Filter by date: from date – to date
- Filter by sales head
- Filter by sales team member
- On top there will be add target option also
    - Click on this option will show another page
        - This page will show the fields
            - Select sales head (search type dropdown) → it will auto filter the sales team under him.
            - Sales team member ID (search type dropdown)
            - Sales team member First name (search type dropdown)
            - Sales team member Last name (search type dropdown)
                - If type and select anyone out of these three others should auto fill. These three are ID First name last name
            - Select date – From Date: To Date (if on that date the sales team person already has target it will not be selected by admin. Admin can assign the target for the date on which there is no target for sales team person)
            - A typing area to write the Sales Amount Target

- Submit button → will route to main page of targets

- There will be a table also below to show all the targets history with pagination

| s.no | Team member name | Team member ID | Sales Head Name | Sales Head ID | Target amount assigned | Assigned by | Assigned By (ID) | Designation | Date | Achieved target | Missed target | Actions |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | Edit<br>Delete |
| | | | | | | If assigned by sales head or admin or manager etc show the name with ID and designation | If assigned by sales head or admin or manager etc show the name with ID and designation | If assigned by sales head or admin or manager etc show the name with ID and designation | | | | If assigned by admin cannot be edited or deleted by sales head<br><br>If assigned by sales |

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | head, it can be edited or deleted by admin |

- Per page 10 entries will appear
- On top there will be 3 boxes also with icons and title which will change with selection of filters given above
  - First  will show the Total Target till date assigned with heading of **TOTAL TARGETS**
  - Second will show the achieved targets till date with the heading of **ACHIEVED TARGETS**
  - Third box will show the missed target with the heading of **Missed Target** and it will show the amount (Total target – Achieved target)

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## Forms & Permissions section

## User Management

- View Users

Search option On Top

| S.No | ID | Picture | Name | Number | Email | Address | Area | Designation | Username | Password | Added By | Edited By | Action |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | Manager<br>Accountant<br>Admin | | | | | Edit<br>Activate<br>Deactivate |

- **Add User**

    i. Add new option click

    1. Select Role
        a. Admin
        b. Manager
    2. Type name
    3. Email
    4. Address
    5. Area
    6. Cnic
    7. User Picture
    8. Username
    9. Password

**Submit button**

## Distributor Wise Sales Team

- View
- Assign

Click on view list → It will open a page

- Top search bar
- Top Assign Button
- Filter by distributor ID/Name
- Filter by sales head ID/Name
- Below there will be table
- With select all button for checklist

**Select will show action bars above as Dropdown**

- Suspend
- Assign To Another Distributor

| s.no | checklist | Distributor ID | Distributor Name | Sales Head ID | Sales Head Name | Actions |
|---|---|---|---|---|---|---|

| | | | | | | |
|---|---|---|---|---|---|---|
| | | Clickable ID. Click and see all the Sales Heads he is connected with. | | Clickable ID. Click and see all the distributor he is connected with | | Suspend<br>Assign to More distributors |

| **Actions** | **What it will do?** |
|---|---|
| **Suspend** | It will remove the sales person from distributor. No sales person will be able to see the distributor in his dashboard neither the distributor can see the sales head. Orders pending will be hold and cannot be processed. |
| **Assign to More distributors** | It will open a page → Search a sales person with fields (search dropdown) which will have “Sales Head Name” & “Sales Head ID”. Type 1 and other will auto fill.<br>After an ID is selected of sales head → auto appear distributors → multi selection of distributors →and save button. |

**Assign Button On Top**

It will open a page → Search a sales person with fields (search dropdown) which will have “Sales Head Name” & “Sales Head ID”. Type 1 and other will auto fill.

After an ID is selected of sales head → auto appear distributors → multi selection of distributors →and save button.

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## Order Management

- Orders To Nine Leaves
- Orders To Distributors

**a. Orders To Nine Leaves**

These are the orders which are placed to nine leaves by the distributors as they get orders from sales team. After click on this button there will open a page.

Above al there must be a heading “**Nine Leaves Order List**” without inverted commas

- Top Order Summary in boxes format
  - Total Orders: e.g 22557
  - Total Delivered Orders
  - Total Pending Orders
  - Total Cancelled Orders
  - Total rejected Orders
- Top filter By distributor (Search and type the name or ID other fill itself and click on filter button
- Top add order option

- Top Search Bar
- Top filter by “User added” search filed with dropdown for ID and Mane (2 fields)
- Top filter by status (DD) and click on filter option with apply button
- Top Date wise selection: **From Date: - To Date**
- Select all option which will show the action dropdown

There will be a table also showing the orders

| Check list | S. no | Date Of Order | Date Of Delivery | Order ID | Distributor ID | Distributor Name | Product List | Total Order Amount | Shipping Cost | Total Amount | Recived Amount | Remaining Dues | Added By User ID | Added By User Name | Status | Comments | Actions |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | **View** Clickable option which will open | | | | | | | | **Pending** | **View History** | **Collect Payment** |

| | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | a new page to show the products in this order with quantity and per unit cost | | | | | | | | | | **Change status** |

- If there is no due amount or dues option is 0, collect option under action will be non-clickable
- Change Status will show a popup to change. It will show these options. “Cancelled” Color Will be red, “Pending” color Yellow, “Delivered” Color Green, “Rejected” Blue Color which will have a comment box also. Default order will be pending.
- Status will show the latest status
- Comment will show the latest comment.

- Click on view History → open a popup → which will show a table like this. With latest entry on top

| S.no | Date | Status | Comment | Edited By *(ID) | Edited By *(Name) |
|---|---|---|---|---|---|
| | | | | | |

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- **Add Order**

**Open a page & Show these fields:**

- Select distributor:
  - Name and ID search type dropdown bars. One will fill both.
- Select product with quantity and per carton cost. This will have a plus sign to add up as many products as required.
- Delivery charges text area which accepts the digits only with decimal
- Total charges in decimals also – auto calculate
- Paid amount text area which accepts the digits only with decimal
- Remaining dues with decimals auto calculate
- Submit option

Moves to the list area of orders → Nine Leaves Order List

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**b. Orders To Distributor**

These are the orders which are placed to distributors by the sales head as they get orders from sales team. After click on this button there will open a page.

Above all there must be a heading "**Distributors Order List**" without inverted commas

- Top Order Summary in boxes format
    - Total Orders: e.g 22557
    - Total Delivered Orders
    - Total Pending Orders
    - Total Cancelled Orders
    - Total rejected Orders
- Top filter By distributor (Search and type the name or ID other fill itself and click on filter button)
- Top filter By Sales Head (Search and type the name or ID other fill itself and click on filter button)
- Top add order option
- Top Search Bar
- Top filter by status (DD) and click on filter option
- Top Date wise selection: **From Date: - To Date**
- Select all option which will show the action dropdown with apply button

There will be a table also showing the orders

| Checklist | S. no | Date Of Order | Date Of Delivery | Order ID | Distributor ID | Distributor Name | Sales Head ID | Sales Head | Product List | Total Order Amount | Shipping Cost | Total Amount | Recived Amount | Remaining Dues | Status | Comments | Actions |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|

| | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | Name | | | | | | | | | |
| | | | | | | | | | **View** Clickable option which will open a new page to show the products in this order with quantity and | | | | | | **Pending** | **View History** | **Collect Payment**<br><br>**Change status** |

| | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | per unit cost | | | | | | | |

- If there is no due amount or dues option is 0, collect option under action will be non-clickable
- Change Status will show a popup to change. It will show these options. “Cancelled” Color Will be red, “Pending” color Yellow, “Delivered” Color Green, “Rejected” Blue Color which will have a comment box also. Default order will be pending.
- Status will show the latest status
- Comment will show the latest comment.
- Click on view History → open a popup → which will show a table like this. With latest entry on top

| S.no | Date | Status | Comment | Edited By *(ID) | Edited By *(Name) |
|---|---|---|---|---|---|
| | | | | | |

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- **Add Order**

**Open a page & Show these fields:**

- Select distributor:
  - Name and ID search type dropdown bars. One will fill both.
- Select Sales Head:
  - Name and ID search type dropdown bars. One will fill both.

- Select product with quantity and per carton cost. This will have a plus sign to add up as many products as required.
- Delivery charges text area which accepts the digits only with decimal
- Total charges in decimals also – auto calculate
- Paid amount text area which accepts the digits only with decimal
- Remaining dues with decimals auto calculate
- Submit option

Moves to the list area of orders → Distributor Order List

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**c. Orders To Sales Head**

These are the orders which are placed to sales head through sales teams. After click on this button there will open a page.

Above all there must be a heading "**Sales Head Order List**" without inverted commas

- Top Order Summary in boxes format
  - Total Orders: e.g 22557
  - Total Delivered Orders
  - Total Pending Orders
  - Total Cancelled Orders
  - Total rejected Orders
- Top filter By Sales Head (Search and type the name or ID other fill itself and click on filter button)
- Top filter by sales team member (Search and type the name or ID other fill itself and click on filter button)
- Top add order option

- Top Search Bar
- Top filter by status (DD) and click on filter option
- Top Date wise selection: **From Date: - To Date**
- Select all option which will show the action dropdown with apply button

There will be a table also showing the orders

| Checklist | S. no | Date Of Order | Date of delivery | Order ID | Sales Head ID | Sales Head Name | Team member? | Team member ID | Team member Name | Product List | Total Order Amount | Shipping Cost | Total Amount | Recieved Amount | Remaining Dues | Status | Comments | Actions |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | **Yes**<br><br>**No** | | | **View** Clickable option which will open a new | | | | | | **Pending** | **View History** | **Collect Payment**<br><br>**Change status** |

| | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | page to show the products in this order with quantity and per unit cost | | | | | | | | |

- If there is no due amount or dues option is 0, collect option under action will be non-clickable
- Change Status will show a popup to change. It will show these options. “Cancelled” Color Will be red, “Pending” color Yellow, “Delivered” Color Green, “Rejected” Blue Color which will have a comment box also. Default order will be pending.
- Status will show the latest status
- Comment will show the latest comment.
- Click on view History → open a popup → which will show a table like this. With latest entry on top

| S.no | Date | Status | Comment | Edited By *(ID) | Edited By *(Name) |
|---|---|---|---|---|---|
| | | | | | |

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- **Add Order**

**Open a page & Show these fields:**

- Select Sales Head:
    - Name and ID search type dropdown bars. One will fill both.
- Select Sales Team Member:
    - Name and ID search type dropdown bars. One will fill both.
- Select product with quantity and per carton cost. This will have a plus sign to add up as many products as required.
- Delivery charges text area which accepts the digits only with decimal
- Total charges in decimals also – auto calculate
- Paid amount text area which accepts the digits only with decimal
- Remaining dues with decimals auto calculate
- Submit option

Moves to the list area of orders → Sales Head Order List

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