



SalesOptima

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# USER MANUAL

# GETTING STARTED

Welcome to SalesOptima, your comprehensive sales performance optimization system. This user manual will guide you through the various features and functionalities of SalesOptima to help you optimize your sales processes effectively.

To get started with SalesOptima, follow these steps:

## 1. Accessing the Sytem

Open your web browser and navigate to the SalesOptima login page.

## 2. Logging In

Enter your email address and password to log in to SalesOptima.





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## 4. Forgot Password (If needed)

If you've forgotten your password, click on the "Forgot Password" option on the login page. Enter your email address, and a password reset link will be sent to your email. Follow the instructions in the email to reset your password.

The screenshot shows the SalesOptima registration form. On the left is the SalesOptima logo and the text "SALE TRACKER SYSTEM". The form fields on the right are: First name (Erica Joy), Last name (Cavaneyro), Email Address (ericacavaneyro@gmail.com), Company (WeebDev), Phone Number (+63 908 123 4567), Password (masked with asterisks), Confirm Password (masked with asterisks), and Business Certificate (with an "Upload a file" button). At the bottom, there is a checkbox for "I agree with the Terms and Conditions" and a play button icon.

## 4. Registration (If New User)

If you are a new user, click on the "Register" option and follow the prompts to create your account. Provide your personal and company information, agree to the terms and conditions, and complete the registration process.

This is a duplicate of the screenshot above, showing the SalesOptima registration form with the same fields and layout.

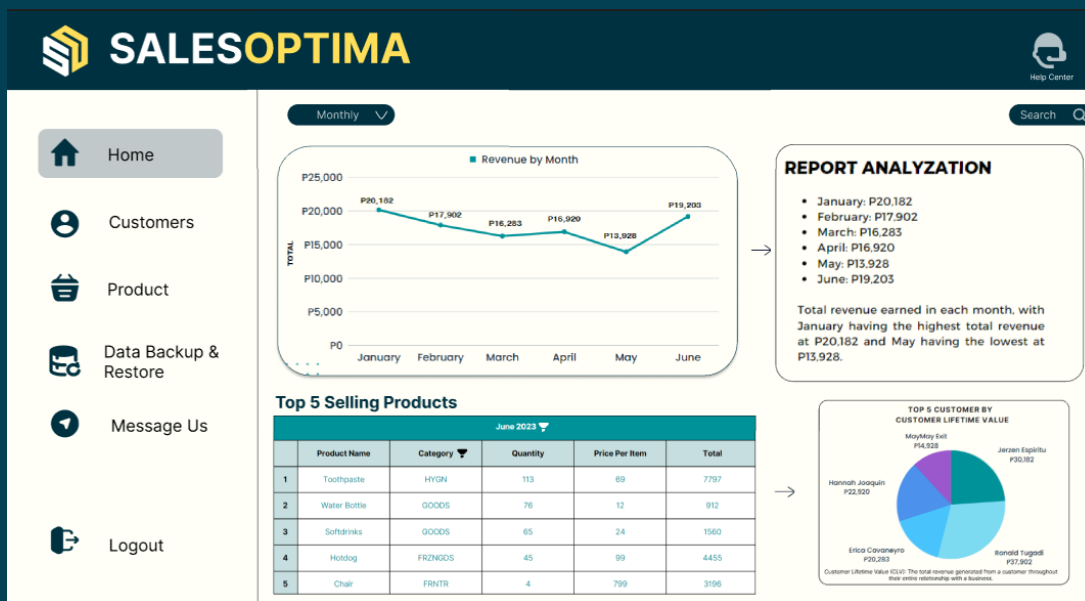
The screenshot shows the SalesOptima Integration page. On the left is the SalesOptima logo and the text "SALE TRACKER SYSTEM". On the right, under the heading "Integration", is a section titled "Bind Ecommerce Website to SalesOptima". It contains a dropdown menu labeled "Select Platform to bind" and a "Register" button at the bottom.



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# NAVIGATING DASHBOARD

The dashboard serves as the central hub for accessing key insights and data related to your sales performance.



1. **Filters:** Use the filter options to customize the dashboard view based on specific time periods (daily, monthly, yearly).
2. **Search bar:** Search for desired data.
3. **Sales Summary:** Provides a summary of your sales performance, including total revenue, average sales, and expenses.
4. **Product Sales:** Displays a breakdown of product sales, including top-selling products and revenue generated by each product.
5. **Top Customers:** Highlights your top or priority customers based on their purchasing behavior and contribution to sales revenue.
6. **Navigation Menu:** Access various sections of SalesOptima, such as customer information, product listings, transactions, and more, using the navigation menu.

# VIEWING CUSTOMER INFORMATION

To view customer information:

1. Click on the "**Customers**" option in the navigation menu.
2. You will be presented with a list of customers and their contact details.
3. Click on a **customer's name** to view more detailed information, including their purchase history, interactions, and preferences.
4. Use the search and sort options to narrow down the list based on specific criteria if needed.



The screenshot shows the SalesOptima web application. On the left is a navigation menu with icons and labels for Home, Customers (highlighted), Product, Data Backup & Restore, Message Us, and Logout. The main area displays a table of customer information. The table has columns for Customer ID, Customer Name, Email, Contact Number, and CLV (Customer Lifetime Value). There are also sort and search icons at the top right of the table.

Customer ID	Customer Name	Email	Contact Number	CLV Customer Lifetime Value
da2ga3dk88	Ronald Tugadi	Tugadi@gmail.com	091213101212	₱37,902
Pa4ga3dk88	Jerzen Espiritu	JEspiritu@gmail.com	09973456789	₱30,182
d42Go3dk88	Hannah Joaquin	HGHG@gmail.com	09162459643	₱22,920
da2ga3dkoP	Erica Cavaneyro	EricaJoy@gmail.com	09829379643	₱20,283
qa2ga3dkM0	MayMay Exit	MaiMai@gmail.com	09233483714	₱14,928
d82p93dk88	Eytch Ghie	HGJoaqs@gmail.com	09230917323	₱13,499
pM2ga3dk89	Hannah Polino	CutePink@gmail.com	09283946150	₱10,479
Om2ga3dk98	Eri Delos Santos	EDSantos@gmail.com	09241873043	₱8,499
Pn2ga3dk98	Mickey Moni	MMoni@gmail.com	0923345982	₱7,499
d23ga3dpH8	Angel Tonet	AngieT@gmail.com	09938172643	₱5,997



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# VIEWING CUSTOMER TRANSACTIONS

To view customer transactions:

1. Click on a **customer's name** from customer information
2. You will be presented with a list of customer transactions, including order details such as date, product, order number, quantity, and total cost.
3. Use the search and sort options to narrow down the list based on specific criteria if needed.



Customer ID	Customer Name	Email	Contact Number	CLV Customer Lifetime Value
da2ga3dk88	Ronald Tugadi	Tugadi@gmail.com	091213101212	₱37,902
Pa4ga3dk88	Jerzen Espiritu	JEspiritu@gmail.com	09973456789	₱30,182
d42Go3dk88	Hannah Joaquin	HGHG@gmail.com	09162459643	₱22,920
da2ga3dkoP	Erica Cavaneyro	EricaJoy@gmail.com	09829379643	₱20,283
qa2ga3dkM0	MayMay Exit	MaiMai@gmail.com	09233483714	₱14,928
d82p93dk88	Eytch Ghie	HGJoaqs@gmail.com	09230917323	₱13,499
pM2ga3dk89	Hannah Polino	CutePink@gmail.com	09283946150	₱10,479
Om2ga3dk98	Eri Delos Santos	EDSantos@gmail.com	09241873043	₱8,499
Pn2ga3dk98	Mickey Moni	MMoni@gmail.com	0923345982	₱7,499
d23ga3dpH8	Angel Tonet	AngieT@gmail.com	09938172643	₱5,997

# VIEWING PRODUCT LISTINGS

To view product listings:

1. Click on the "Products" option in the navigation menu.
2. You will see a list of products available in your inventory, along with relevant details such as product name, ID, category, stock level, and price.
3. Scroll through the list to view all available products.
4. Use the search and sort options to narrow down the list based on specific criteria if needed.



The screenshot shows the SalesOptima web application interface. On the left is a navigation menu with options: Home, Customers (selected), Product, Data Backup & Restore, Message Us, and Logout. The main content area displays a table of customer data. The table has columns for Customer ID, Customer Name, Email, Contact Number, and CLV (Customer Lifetime Value). A search bar is located at the top right of the table area.

Customer ID	Customer Name	Email	Contact Number	CLV Customer Lifetime Value
da2ga3dk88	Ronald Tugadi	Tugadi@gmail.com	091213101212	₱37,902
Pa4ga3dk88	Jerzen Espiritu	JEspiritu@gmail.com	09973456789	₱30,182
d42Go3dk88	Hannah Joaquin	HGHG@gmail.com	09162459643	₱22,920
da2ga3dkoP	Erica Cavaneyro	EricaJoy@gmail.com	09829379643	₱20,283
qa2ga3dkM0	MayMay Exit	MaiMai@gmail.com	09233483714	₱14,928
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d23ga3dpH8	Angel Tonet	AngleT@gmail.com	09938172643	₱5,997



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# SENDING FEEDBACK

Your feedback is valuable to us! If you have any thoughts, suggestions, or issues regarding SalesOptima, you can send us feedback directly through the system.

Here's how:

1. Click on the "Message Us" option in the navigation menu.
2. Fill out the feedback form with your subject, description, and any relevant details.
3. Click the "Send" button to submit your feedback.

The screenshot shows the SalesOptima web interface. The top header features the SalesOptima logo and a 'Help Center' icon. A left sidebar contains navigation links: Home, Customers, Product, Data Backup & Restore, Message Us (highlighted with a blue bar and a notification badge), and Logout. The main content area is titled 'Should you have questions? Reports?' and contains a feedback form. The form has two sections: 'Subject' with a text input field containing the placeholder 'Subject', and 'Description' with a larger text area containing the placeholder 'Your Message...'. A 'Send' button is positioned below the description field. At the bottom of the main area, there are social media icons for Facebook, Email, Twitter, LinkedIn, and YouTube.





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# BACKING UP AND RESTORING DATA

To back up and restore data:

1. Click on the "**Restore and Backup**" option in the navigation menu.
2. Select the desired date range for data backup.
3. Click the "**Backup**" button to initiate the **backup process**.
4. To **restore data**, simply upload the desired data and click the "**Import**" button.

The screenshot shows the SalesOptima web application interface. The top header features the SalesOptima logo and a Help Center icon. A left sidebar contains navigation links: Home, Customers, Product, Data Backup & Restore (highlighted), Message Us, and Logout. The main content area is divided into two sections. The 'Data Backup' section includes 'From' and 'To' date range selectors (both set to 'Select Month') and a 'Download data' button. The 'Restore Data' section includes an 'Upload' button and an 'Import' button.



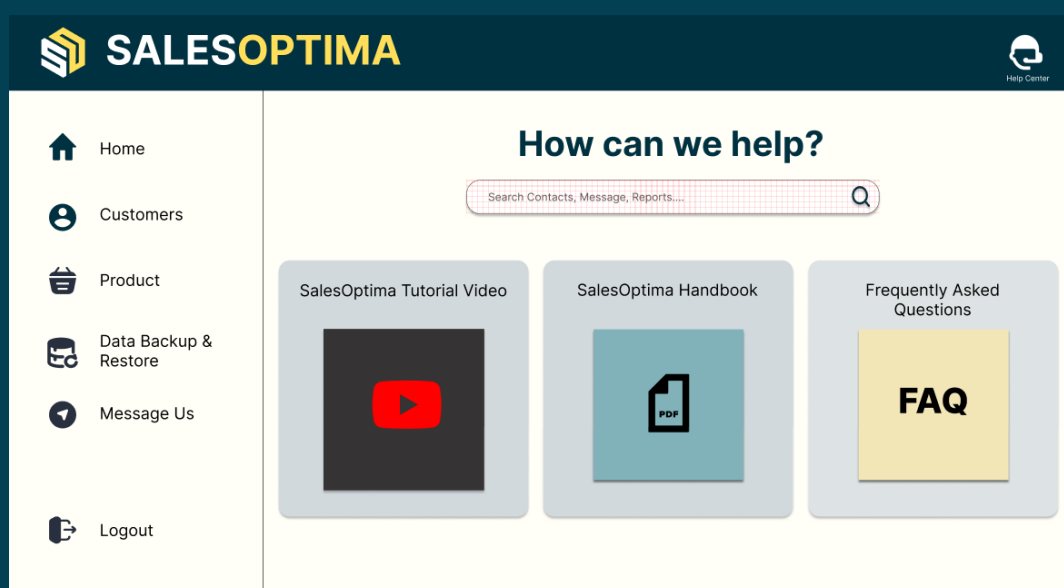
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# ACCESSING HELP CENTER

If you need assistance or guidance while using SalesOptima, click on the "Help Center" button located in the top bar.

The Help Center contains the following resources:

1. **YouTube Video:** Watch a tutorial video to learn how to navigate and use SalesOptima effectively.
2. **SalesOptima User Manual or Handbook:** Access the comprehensive user manual or handbook for detailed instructions on using SalesOptima.
3. **Frequently Asked Questions (FAQs):** Browse through commonly asked questions and their answers to find solutions to common issues.
4. **Search Bar:** Use the search bar to quickly find specific topics or information within the Help Center.





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# CONGRATULATIONS!

You've completed the user manual for SalesOptima. We hope this guide has been helpful in familiarizing you with the system's features and functionalities. If you have any further questions or need assistance, feel free to reach out to our support team.

Thank you for choosing SalesOptima to optimize your sales performance!

*Note: This user manual provides a basic overview of SalesOptima's key features and functionalities. For more detailed instructions and assistance, please refer to the specific sections of this manual or contact our support team for further guidance.*

