

**Capstone Project Report**

**Report 6 – Software User Guides**

– Ho Chi Minh City, 01/2021 –

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# I. Project Report

## 1. Status Report

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Work Item** | **Status** | **Notes (Work Item in Details)** |
| 1 | Deliverable Package | In Progress |  |
| 2 | Installation Guides | In Progress |  |
| 3 | User Manual | In Progress |  |
| 4 | Japanese User Manual | Pending |  |

## 2. Team Involvements

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Task** | **Member** | **Notes (Task Details, etc.)** |
| 1 |  | HaPTN |  |
| 2 |  | NguyenLG |  |
| 3 |  | GiaNH |  |

## 3. Issues/Suggestions

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Issue** | **Status** | **Notes (Solution, Suggestion, etc.)** |
| 1 |  | Pending |  |
| 2 |  | In Progress |  |
| 3 |  | Completed |  |

# II. Release Package & User Guides

## 1. Deliverable Package

### 1.1 Source codes & documents

| **No.** | **Items** | **Sub-Items** | **Type** | **Version** |
| --- | --- | --- | --- | --- |
| ***Code Package*** | | | | |
| 1 | Web Apps |  | New | 1.0.0 |
| 2 | API Services |  | New | 1.0.0 |
| ***Database*** | | | | |
| 1 | Tables | contract.sql | New | 1.0.0 |
| district.sql | New | 1.0.0 |
| personal\_activity.sql | New | 1.0.0 |
| report.sql | New | 1.0.0 |
| role.sql | New | 1.0.0 |
| school.sql | New | 1.0.0 |
| school\_status.sql | New | 1.0.0 |
| target\_school.sql | New | 1.0.0 |
| target\_school\_purpose.sql | New | 1.0.0 |
| user.sql | New | 1.0.0 |
| ***Documents*** | | | | |
| 1 | Introduction | Report1\_Project Introduction.docx | New | 1.0.0 |
| 2 | Management Plan | Report2\_Project Management Plan.docx | New | 1.0.0 |
| 3 | Requirement | Report3\_Software Requirement Specification.docx | New | 1.0.0 |
| 4 | Design | Report4\_Software Design Document.docx | New | 1.0.0 |
| 5 | Testing | Report5\_Test Documentation.docx | New | 1.0.0 |
| Report5\_Test Case Document.docx | New | 1.0.0 |
| Report5\_Unit Test Case.docx | New | 1.0.0 |
| 6 | User Guides | Report6\_Software User Guides.docx | New | 1.0.0 |
| 7 | Final | Report7\_Final Project Report.docx | New | 1.0.0 |

Table 1. Source codes & documents

### 1.2 Known Issues, Limitations & Restrictions

* The current system does not provide a mobile app version for the user.
* The current system does not support communication channel with customers.
* The web application responsive interface has not stable yet.
* The interface still lacks consistency, may or may not cause uncomfortable for the user.
* The current application only supports English default.
* The system lacks testing, which leads to application performance or bugs that may cause during implementation.
* During the lack of team resources, some main features of the application have not been implemented.

## 2. Installation Guides

### System Requirements

#### 2.1.1 Hardware Requirements

* Since this system is a web application, all the devices using the system must run over the Internet.
* Our system is deployed on the server, which the minimum requirements services to run in the following:

For Web App

|  |  |
| --- | --- |
| **Hardware** | **Minimum Requirements** |
| vCPU | 1 |
| Operation System | Linux Server/Window server |
| Memory (GiB) | 1GiB |

Table 2. <Installation guides> Hardware requirements for Web App

For API Services

|  |  |
| --- | --- |
| **Hardware** | **Minimum Requirements** |
| vCPU | 1 |
| Operation System | Linux Server/Window server |
| Memory | 1GiB |

Table 3. <Installation guides> Hardware requirements for API service

For Database

|  |  |
| --- | --- |
| **Hardware** | **Minimum Requirements** |
| vCPU | 1 |
| Operation System | Linux server/Window server |
| Computer Memory | 1GiB |

Table 4. <Installation guides> Hardware requirements for Database

#### 2.1.2 Software Requirements

This web application works with: Chrome (version 52 or above), Firefox (version 51 or above), Edge (version 14 or above), Safari (version 10 or above), or Opera (version 38 or above) browser.

### 2.2 Setup Files

N/A

### 2.3 Installation Instruction

N/A

## 3. User Manual

### 3.1 Terms and definitions

* This system is built for Major Education with a project code SMSME, which stands for Sales Management System for Major Education.
* This system is an enterprise application, with the license rules and terms of use belong to Major Education.

### 3.2 System requirements

#### 3.2.1 Hardware Requirements

* Since this system is a web application, all the devices using the system must run over the Internet.
* Our system is deployed on the server, which the minimum requirements services to run in the following:

For Web App

|  |  |
| --- | --- |
| **Hardware** | **Minimum Requirements** |
| vCPU | 1 |
| Operation System | Linux Server/Window server |
| Memory (GiB) | 1GiB |

Table 5. <User Manual> Hardware requirements for Web App

For API Services

|  |  |
| --- | --- |
| **Hardware** | **Minimum Requirements** |
| vCPU | 1 |
| Operation System | Linux Server/Window server |
| Memory (GiB) | 1GiB |

Table 6. <User Manual> Hardware requirements for API Services

For Database

|  |  |
| --- | --- |
| **Hardware** | **Minimum Requirements** |
| vCPU | 1 |
| Operation System | Linux server/Window server |
| Memory (GiB) | 1GiB |

Table 7. <User Manual> Hardware requirements for Database

#### 3.2.2 Software Requirements

This web application works with: Chrome (version 52 or above), Firefox (version 51 or above), Edge (version 14 or above), Safari (version 10 or above), or Opera (version 38 or above) browser.

### 3.3 Application Usage

#### 3.3.1 Overview

The target users that SMSME mainly aims to are salesmen and sales managers of the Sales Department of Major Education.

For salesmen, this software would help them manage their work-plan as well as their tasks easier and more visually, submit daily reports more directly and they can also monitor other salesmen’s works.

For sales managers, they would not have to collect and analyse all salesmen’s reports manually. Now they can supervise salesmen or search for reports more easily. Moreover, they can see the overall picture of the company's business process, including what schools are lead or customers, who are the most effective salesmen, …

#### 3.3.2 Accounts

Purpose

* The admin manages user accounts.

Functions

* View list of accounts.
* View account’s details.
* Search accounts.
* Create accounts.
* Edit account’s information.

User interface(s)

Graphical user interface, text, application, chat or text message

Description automatically generated

Figure 1. List of Accounts

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Admin” |
| 1 | Click on “Accounts” on the sidebar |

Table 8. View all Accounts <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 3 | Search | Search users by username, full name, phone, and user email. | No | No | Text Field | String |

Table 9. View all Accounts <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Filter button | Open/Collapse Filter zone | No | An accordion which contains filters inside |
| 4 | Create accounts | Create new user account | No | A “Create Accounts” form |
| 5 | Sort |  | No |  |
| 6 | Open menu options | Show menu options of actions which are allowed for a specific role | No |  |
| 7 | Menu Option | Option “View details” to show more details of the table’s row data | No |  |
| 8 | Change limit of the table | Select number of rows per page to display on the table (pagination) | No |  |
| 9 | First page | Move to the first page in the table | No |  |
| 10 | Previous page | Move to the page in the table | No |  |
| 11 | Next page | Move to the next page in the table | No |  |
| 12 | Last page | Move to the last page in the table | No |  |

Table 10. View all Accounts <functions>

Graphical user interface, application

Description automatically generated

Figure 2. Accounts Filters

|  |  |
| --- | --- |
| **Step** | **Description** |
| 1 | Click on the filters button |

Table 11. Account Filters <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 4 | Working status | Filter users by their working status (is working or quit job…) | No | No | Select | String |
| 5 | Roles | Filter users by their roles | No | No | Select | String |

Table 12. Accounts Filters <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Clear All filters | Clear all selected filters and reset all filters to default value | No |  |
| 3 | Remove a filter | Each selected filter is display as a chip. Clicks on “x” button to remove that chip and reset the according filter to default value | No |  |

Table 13. Accounts Filters <functions>

Graphical user interface, text, application

Description automatically generated

Figure 3. Create Account Form

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | Click on the create account button |

Table 14. Create Account Form <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | Username | Username of the user | No | Yes | Text Field | String |
| 2 | Full Name | Full name of the user | No | Yes | Text Field | String |
| 3 | Phone Number | Phone number of the user | No | Yes | Text Field | String |
| 4 | Email | Email of the user | No | Yes | Text Field | String |
| 5 | Address | Address of the user | No | Yes | Text Field | String |
| 6 | Gender | Gender of the user | No | Yes | Checkbox | Boolean |
| 7 | Birthday | Birthday of the user | No | No | Text Field | Date |
| 8 | Roles | Role of the user | No | Yes | Combo Box | String |

Table 15 Create Account Form <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 9 | Save | Create a new account | Yes | Notify create successfully |
| 10 | Cancel | Cancel create a new account | No | Close the form |
| 11 | Close Icon | Cancel create a new account | No | Close the form |

Table 16 Create Account Form <functions>

Graphical user interface, text, application

Description automatically generated

Figure 4. Account’s details

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Admin” |
| Pre-condition | Click on “View details” option on the menu item of the table |

Table 17. View Accounts details <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | Username | Username of the user | Yes | Yes | Text Field | String |
| 2 | Email | Email of the user | Yes | Yes | Text Field | String |
| 3 | Phone number | Phone number of the users | No | Yes | Text Field | String |
| 4 | Address | Address of the user | No | Yes | Text Field | String |
| 5 | Gender | Gender of the user | No | Yes | Checkbox | Boolean |
| 6 | Birthday | Birthday of the user | No | No | Text Field | Date |
| 7 | Roles | Role of the user | No | Yes | Combo Box | String |
| 8 | Account Active | Working status of the user | No | Yes | Switch | Boolean |

Table 18. View Account details <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 9 | Save | Update account info | Yes | Notify update successfully |
| 10 | Go back | Go back to accounts page | No | Redirect to Accounts page |

Table 19. View Account details <functions>

#### 3.3.3 Schools

Purpose

* The admin manages school’s info.
* The sales manager edits school’s info.
* The sales supervisor edits school’s info.
* The salesman edits school’s info.

Functions

* View list of schools.
* View school’s details.
* Search schools.
* Create schools.
* Edit school’s information.

User interface(s)

A screenshot of a computer

Description automatically generated with medium confidence

Figure 5. List of Schools

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Admin” |
| 1 | Click on “Schools” on the sidebar |

Table 20. View all Schools <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 3 | Search | Search schools by school name, address, principal | No | No | Text Field | String |

Table 21. View all Schools <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Filter button | Open/Collapse Filter zone | No | An accordion which contains filters inside |
| 4 | Create schools | Create new school | No | A menu list |
| 5 | Sort |  | No |  |
| 6 | Open menu options | Show menu options of actions which are allowed for a specific role | No |  |
| 7 | Menu Option | Option “View details” to show more details of the table’s row data | No |  |
| 8 | Change limit of the table | Select number of rows per page to display on the table (pagination) | No |  |
| 9 | First page | Move to the first page in the table | No |  |
| 10 | Previous page | Move to the page in the table | No |  |
| 11 | Next page | Move to the next page in the table | No |  |
| 12 | Last page | Move to the last page in the table | No |  |

Table 22. View all Schools <functions>

Graphical user interface, application

Description automatically generated

Figure 6. Schools Filters

|  |  |
| --- | --- |
| **Step** | **Description** |
| 1 | Click on the filters button |

Table 23. Schools Filters <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 4 | Districts | Filter schools by the districts | No | No | Select | String |
| 5 | School Types | Filter schools by the school types | No | No | Select | String |
| 6 | School Levels | Filter schools by the educational level | No | No | Select | String |
| 7 | Working status | Filter schools by the working status | No | No | Select | String |

Table 24. Schools Filters <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Clear All filters | Clear all selected filters and reset all filters to default value | No |  |
| 3 | Remove a filter | Each selected filter is display as a chip. Clicks on “x” button to remove that chip and reset the according filter to default value | No |  |

Table 25. Schools Filters <functions>

Graphical user interface, text, application, chat or text message

Description automatically generated

Figure 7. Create School Menu

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | Click on the create school button |

Table 26 Create School Menu <steps>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 1 | Create | Create a new school info by using form | No | A “Create School” form |
| 2 | Import | Create a new school info by using import file | No | A “Import File” dialog |

Table 27. Create School Menu <functions>

Graphical user interface, application

Description automatically generated

Figure 8. Create School Form

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | Choose “Create” from create school menu |

Table 28. Create School Form <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | School Name | Name of the school | No | Yes | Text Field | String |
| 2 | Address | Address of the school | No | Yes | Text Field | String |
| 3 | Tel | Telephone number of the school | No | No | Text Field | String |
| 4 | Educational Level | Educational Level of the school | No | No | Combo Box | String |
| 5 | School Type | School Type of the school | No | No | Combo Box | String |
| 6 | With Representative | Check if the school has the representative info | No | No | Check box | Boolean |
| 7 | Full Name | Full name of the  representative | No | No | Text Field | String |
| 8 | Gender | Gender of the representative | No | No | Checkbox | Boolean |
| 9 | Phone number | Phone number of the representative | No | No | Text Field | String |
| 10 | Email | Email of the representative | No | No | Text Field | String |

Table 29 Create School Form <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 11 | Save | Create a new account | Yes | Notify create successfully |
| 12 | Cancel | Cancel create a new account | No | Close the form |
| 13 | Close Icon | Cancel create a new account | No | Close the form |

Table 30 Create School Form <functions>

Graphical user interface, application, Teams

Description automatically generated

Figure 9. Import Schools

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | Choose “Import” from create school menu |

Table 31. Import Schools <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 3 | Validate file info checker | Check validate row inserted successfully | No | No | Text Field | String |

Table 32 . Import Schools <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 1 | Sample file | Download an import sample file | No | An import sample file |
| 2 | Choose file | Choose file to import | No |  |
| 4 | Save | Create school’s info by the imported file | Yes | Notify import successfully |
| 5 | Cancel | Cancel import file | No | Close the dialog |

Table 33. Import Schools <functions>

Graphical user interface

Description automatically generated

Figure 10. School’s details<General Info>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Admin” |
| Pre-condition | Click on “View details” option on the menu item of the table |
| Pre-condition | “General info” tab selected |

Table 34. View Schools details <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | School Name | Name of the school | No | Yes | Text Field | String |
| 2 | Address | Address of the school | No | Yes | Text Field | String |
| 3 | Tel | Telephone number of the school | No | No | Text Field | String |
| 4 | Educational Level | Educational Level of the school | No | No | Combo Box | String |
| 5 | School Type | School Type of the school | No | No | Combo Box | String |
| 8 | School Active | Working status of the school | No | Yes | Switch | Boolean |

Table 35. View School details <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 9 | Save | Update school info | Yes | Notify update successfully |
| 10 | Go back | Go back to school’s page | No | Redirect to Schools page |

Table 36. View School details <functions>

Graphical user interface

Description automatically generated

Figure 11. School’s details<Principal Info>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Admin” |
| Pre-condition | Click on “View details” option on the menu item of the table |
| Pre-condition | “Principal info” tab selected |

Table 37. View School details <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | Full Name | Full name of the principal | No | No | Text Field | String |
| 2 | Gender | Gender of the principal | No | No | Checkbox | Boolean |
| 3 | Phone number | Phone number of the principal | No | No | Text Field | String |
| 4 | Email | Email of the principal | No | No | Text Field | String |

Table 38. View School details <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 9 | Save | Update principal info | Yes | Notify update successfully |
| 10 | Go back | Go back to school’s page | No | Redirect to Schools page |

Table 39. View School details <functions>

#### 3.3.4 Tasks

Purpose

* The sales manager manages tasks.
* The sales supervisor manages tasks.
* The salesman view assigned of tasks.

Functions

* View list of tasks.
* View task detail.
* Search tasks.
* Create tasks.
* Edit tasks information.
* Assign salesmen to tasks.
* Remove tasks.

User interface(s)

Graphical user interface

Description automatically generated

Figure 12. List of Tasks<Manager view>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Sales Manager” |
| 1 | Click on “Tasks” on the sidebar |

Table 40. View all Tasks <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 3 | Search | Search schools by school name, PIC | No | No | Text Field | String |

Table 41. View all Tasks <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Filter button | Open/Collapse Filter zone | No | An accordion which contains filters inside |
| 4 | Create tasks | Create new tasks | No | A “Create Tasks” dialog |
| 5 | Assign tasks | Assign tasks to salesman | No | A “Assign Salesman to Tasks” dialog |
| 6 | Sort |  | No |  |
| 7 | Open menu options | Show menu options of actions which are allowed for a specific role | No |  |
| 8 | Menu Option | Option “View details” to show more details of the table’s row data.  Option “View reports” to show reports of the tasks.  Option “Remove” to remove a task.  Option “Assign/Unassign” salesman to the task. | No |  |
| 9 | Change limit of the table | Select number of rows per page to display on the table (pagination) | No |  |
| 10 | First page | Move to the first page in the table | No |  |
| 11 | Previous page | Move to the page in the table | No |  |
| 12 | Next page | Move to the next page in the table | No |  |
| 13 | Last page | Move to the last page in the table | No |  |

Table 42. View all Tasks <functions>

Table

Description automatically generated with medium confidence

Figure 13. Tasks Filters<Sales Manager view>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Sales Manager” |
| 1 | Click on the filters button |

Table 43. Tasks Filters <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 4 | School Status | Filter schools by the school status | No | No | Select | String |
| 5 | Purposes | Filter schools by the sales purposes | No | No | Select | String |
| 6 | Districts | Filter schools by the districts | No | No | Select | String |
| 7 | School Years | Filter schools by the school years | No | No | Select | String |
| 8 | School Types | Filter schools by the school types | No | No | Select | String |
| 9 | School Levels | Filter schools by the educational levels | No | No | Select | String |
| 10 | Task Status | Filter schools by the task status | No | No | Select | String |
| 11 | Assign Status | Filter schools by the assign status | No | No | Select | String |
| 12 | PIC’s name | Filter schools by the PIC’s name | No | No | Select | String |

Table 44. Tasks Filters <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Clear All filters | Clear all selected filters and reset all filters to default value | No |  |
| 3 | Remove a filter | Each selected filter is display as a chip. Clicks on “x” button to remove that chip and reset the according filter to default value | No |  |

Table 45. Tasks Filters <functions>

Graphical user interface, application

Description automatically generated

Figure 14. View Create Tasks

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Sales Manager” |
| 1 | Click on “Create Tasks” button |

Table 46. View Create Tasks <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | Districts | Filter schools by the districts | No | No | Select | String |
| 2 | School Types | Filter schools by the school types | No | No | Select | String |
| 3 | School Levels | Filter schools by the educational levels | No | No | Select | String |
| 4 | Search | Search schools by school name, address, principal | No | No | Text Field | String |

Table 47. View Create Tasks <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 5 | Add School | Add schools for the creating task | No | Open a dialog to confirm create tasks |
| 6 | Sort |  | No |  |
| 7 | Select box | Select schools for the creating task | No |  |
| 8 | Change limit of the table | Select number of rows per page to display on the table (pagination) | No |  |
| 9 | First page | Move to the first page in the table | No |  |
| 10 | Previous page | Move to the page in the table | No |  |
| 11 | Next page | Move to the next page in the table | No |  |
| 12 | Last page | Move to the last page in the table | No |  |

Table 48. View Create Tasks <functions>

Graphical user interface

Description automatically generated with medium confidence

Figure 15. Confirm Create Tasks Dialog

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | Add school from the create tasks dialog |

Table 49. Confirm Create Tasks <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | Purposes | Sales purpose for the chosen schools | No | No | Combo box | String |
| 2 | Deadline | Deadline for the task | No | No | Text Field | Date |

Table 50. Confirm Create Tasks <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 3 | Save | Submit a service | Yes | Notify create successfully |
| 4 | Cancel | Cancel create a new account | No | Close the form |
| 5 | Close Icon | Cancel create a new account | No | Close the form |

Table 51 . Confirm Create Tasks <functions>

Graphical user interface, text, application

Description automatically generated

Figure 16. Assign Tasks to Salesman

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Sales Manager” |
| Pre-condition | Select task to assign |
| Pre-condition | Click on “Assign Tasks” button |

Table 52. Assign Tasks to Salesman <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | PIC | PIC’s name | No | No | Text Field | String |
| 3 | Note | Note for the assigning | No | No | Text Field | Date |

Table 53. Assign Tasks to Salesman <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Salesman suggestions | Helper for the assigning tasks to salesman | No |  |
| 4 | Remove | Helper for the criteria of the service | No |  |
| 5 | Save | Assign salesman to the tasks | Yes | Notify create successfully |
| 6 | Cancel | Cancel create a new account | No | Close the form |
| 7 | Close Icon | Cancel create a new account | No | Close the form |

Table 54 Assign Tasks to Salesman <functions>

Graphical user interface, text, application

Description automatically generated

Figure 17. Assign Tasks to Salesman<Salesman Suggestion>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Sales Manager” |
| Pre-condition | Select task to assign |
| Pre-condition | Click on “Assign Tasks” button |

Table 55. Assign Tasks to Salesman <steps>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 1 | Select | Select suggested salesman to the tasks | No |  |
| 2 | Barem of suggestions | Helper to understand the suggestion | No |  |

Table 56 Assign Tasks to Salesman <functions>

Graphical user interface, text, application, email

Description automatically generated

Figure 18. List of Tasks<Salesman view>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Salesman” |
| 1 | Click on “Tasks” on the sidebar |

Table 57. View all Tasks <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 3 | Search | Search schools by school name | No | No | Text Field | String |

Table 58. View all Tasks <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Filter button | Open/Collapse Filter zone | No | An accordion which contains filters inside |
| 4 | Sort |  | No |  |
| 5 | Open menu options | Show menu options of actions which are allowed for a specific role | No |  |
| 6 | Menu Option | Option “View details” to show more details of the table’s row data.  Option “View reports” to show reports of the tasks.  Option “Submit Service” to report a service of the task. | No |  |
| 9 | Change limit of the table | Select number of rows per page to display on the table (pagination) | No |  |
| 10 | First page | Move to the first page in the table | No |  |
| 11 | Previous page | Move to the page in the table | No |  |
| 12 | Next page | Move to the next page in the table | No |  |
| 13 | Last page | Move to the last page in the table | No |  |

Table 59. View all Tasks <functions>

Graphical user interface, application

Description automatically generated

Figure 19. Tasks Filters<Salesman view>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Salesman” |
| 1 | Click on the filters button |

Table 60. Tasks Filters <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 4 | School Status | Filter schools by the school status | No | No | Select | String |
| 5 | Purposes | Filter schools by the sales purposes | No | No | Select | String |
| 6 | Districts | Filter schools by the districts | No | No | Select | String |
| 7 | School Years | Filter schools by the school years | No | No | Select | String |
| 8 | School Types | Filter schools by the school types | No | No | Select | String |
| 9 | School Levels | Filter schools by the educational levels | No | No | Select | String |
| 10 | Task Status | Filter schools by the task status | No | No | Select | String |

Table 61. Tasks Filters <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Clear All filters | Clear all selected filters and reset all filters to default value | No |  |
| 3 | Remove a filter | Each selected filter is display as a chip. Clicks on “x” button to remove that chip and reset the according filter to default value | No |  |

Table 62. Tasks Filters <functions>

Graphical user interface, application

Description automatically generated

Figure 20. Summit Service

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | Choose “Create” from create school menu |

Table 63. Summit Service <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | Service Types | Type of the service | No | Yes | Checkbox | String |
| 2 | Validate from | Service day start | No | No | Text Field | Date |
| 3 | Validate until | Service day end | No | No | Text Field | Date |
| 4 | No. applied classes | Number of classes apply to the service | No | No | Text Field | String |
| 5 | Student per class | Number of students per class | No | No | Text Field | String |
| 6 | Price Floor | Price floor of the service | No | No | Text Field | String |
| 7 | Periods per week | Number of periods per week | No | No | Text Field | String |
| 8 | Note | Note of the service | No | No | Text Field | String |

Table 64. Summit Service <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 9 | Criteria Description | Helper for the criteria of the service | No |  |
| 10 | Estimate Sales | Helper for the sales price | No |  |
| 11 | Save | Submit a service | Yes | Notify create successfully |
| 12 | Cancel | Cancel create a new account | No | Close the form |
| 13 | Close Icon | Cancel create a new account | No | Close the form |

Table 65 Summit Service <functions>

Graphical user interface

Description automatically generated

Figure 21. Task’s details<Task Info>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Sales Manager” |
| Pre-condition | Click on “View details” option on the menu item of the table |
| Pre-condition | “Task info” tab selected |

Table 66. View Task details <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | Sales Purpose | Sales purpose of the task | No | No | Combo Box | String |
| 2 | Manager Note | Managers note for the task | No | No | Text Field | String |

Table 67. View Task details <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 3 | Save | Update task info | Yes | Notify update successfully |
| 4 | Go back | Go back to tasks page | No | Redirect to Tasks page |

Table 68. View Task details <functions>

Graphical user interface, text, application, email

Description automatically generated

Figure 22. Task’s details<School Info>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Sales Manager” |
| Pre-condition | Click on “View details” option on the menu item of the table |
| Pre-condition | “School info” tab selected |

Table 69. View Task details <steps>

Graphical user interface

Description automatically generated

Figure 23. Task’s details<Timeline>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Sales Manager” |
| Pre-condition | Click on “View details” option on the menu item of the table |
| Pre-condition | “Timeline” tab selected |

Table 70. View Task details <steps>

Graphical user interface

Description automatically generated

Figure 24. Task’s details<Task Info>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Salesman” |
| Pre-condition | Click on “View details” option on the menu item of the table |
| Pre-condition | “Task info” tab selected |

Table 71. View Task details <steps>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 3 | Mask as Complete | Mark the target as complete | No |  |
| 4 | Mark as Failed | Mark the target as failed | No |  |

Table 72. View Task details <functions>

#### 3.3.5 Reports

Purpose

* The sales manager manages personal daily reports.
* The sales supervisor manages personal daily reports.
* The salesman manages personal daily reports.
* The sales manager comments on salesman’s report.
* The sales department monitors their reports.

Functions

* View list of reports.
* View report’s details.
* Search reports.
* Create reports.
* Edit report's information.
* Comment reports.
* Remove reports.

User interface(s)

Graphical user interface, text, application

Description automatically generated

Figure 25. List of Reports

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Salesman” |
| 1 | Click on “Reports” on the sidebar |

Table 73. View all Reports <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 3 | Search | Search reports by school name, PIC, description | No | No | Text Field | String |

Table 74. View all Reports <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Filter button | Open/Collapse Filter zone | No | An accordion which contains filters inside |
| 4 | Create reports | Create new report | No | A “Create Report” form |
| 5 | Sort |  | No |  |
| 6 | Menu Option | Option “View details” to show more details of the table’s row data.  Option “Remove” to remove only when report does not have any manager comment. | No |  |
| 7 | Open menu options | Show menu options of actions which are allowed for a specific role | No |  |
| 8 | Change limit of the table | Select number of rows per page to display on the table (pagination) | No |  |
| 9 | First page | Move to the first page in the table | No |  |
| 10 | Previous page | Move to the page in the table | No |  |
| 11 | Next page | Move to the next page in the table | No |  |
| 12 | Last page | Move to the last page in the table | No |  |

Table 75. View all Reports <functions>

Table

Description automatically generated

Figure 26. Reports Filters

|  |  |
| --- | --- |
| **Step** | **Description** |
| 1 | Click on the filters button |

Table 76. Reports Filters <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 4 | Purposes | Filter reports by the sales purpose | No | No | Select | String |
| 5 | Districts | Filter reports by the school district | No | No | Select | String |
| 6 | School Years | Filter reports by the school years | No | No | Select | String |
| 7 | Result | Filter reports by the result | No | No | Select | String |
| 8 | PIC’s name | Filter reports by the PIC’s name | No | No | Select | String |
| 9 | From date to date | Filter reports by date | No | No | Select | String |

Table 77. Reports Filters <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Clear All filters | Clear all selected filters and reset all filters to default value | No |  |
| 3 | Remove a filter | Each selected filter is display as a chip. Clicks on “x” button to remove that chip and reset the according filter to default value | No |  |

Table 78. Reports Filters <functions>

Graphical user interface

Description automatically generated

Figure 27. Create Reports Form

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | Click on the create reports button |

Table 79. Create Reports Form <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | School Name | Name of the school | No | Yes | Text Field | String |
| 2 | Result | Result of the report | No | Yes | Combo Box | String |
| 3 | Description | Description of the report | No | Yes | Text Field | String |
| 4 | Positivity | Positivity of the result | No | No | Text Field | String |
| 5 | Difficulty | Difficulty of the result | No | No | Text Field | String |
| 6 | Future Plan | Future Plan for the result | No | No | Text Field | String |

Table 80. Create Reports Form <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 7 | Add | Add a report to create reports list | Yes | Show the reports list |
| 8 | Save | Create a new account | No | Notify create successfully |
| 9 | Cancel | Cancel create a new account | No | Close the form |
| 10 | Close Icon | Cancel create a new account | No | Close the form |

Table 81. Create Reports Form <functions>

Graphical user interface, application

Description automatically generated

Figure 28. Report’s details<Report Info>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Salesman” |
| Pre-condition | Click on “View details” option on the menu item of the table |
| Pre-condition | Report has not been commented by the manager/supervisor |
| Pre-condition | “Report info” tab selected |

Table 82. View Report details <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | Result | Result of the report | No | Yes | Combo Box | String |
| 2 | Description | Description of the report | No | Yes | Text Field | String |
| 3 | Positivity | Positivity of the result | No | No | Text Field | String |
| 4 | Difficulty | Difficulty of the result | No | No | Text Field | String |
| 5 | Future Plan | Future Plan for the result | No | No | Text Field | String |
| 7 | Manager Comment | A comment of the manager | No | No | Text Field | String |

Table 83. View Report details <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 6 | Save | Update report info | Yes | Notify update successfully |
| 8 | Go back | Go back to school’s page | No | Redirect to Schools page |

Table 84. View Report details <functions>

***Graphical user interface, application, email, website

Description automatically generated***

Figure 29. Report’s details<Assign Info>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Salesman” |
| Pre-condition | Click on “View details” option on the menu item of the table |
| Pre-condition | “Assign info” tab selected |

Table 85. View Report details <steps>

#### 3.3.6. Profiles

Purpose

* The user edits personal profile.

Functions

* View profile.
* Edit profile.

User interface(s)

Graphical user interface, text, application

Description automatically generated

Figure 30. View profiles <steps>

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in the application |
| 1 | Click on the user info in the top-right corner of the screen |
| 2 | In the menu list, select “My Profile” option |

Table 86. View profiles <steps>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 1 | [User Menu] | A button covers the user info and the user menu | No | A menu list shown below |
| 2 | My Profile | A button covers the “My Profile” menu item | No | Redirect to Profiles screen |

Table 87. View profiles <functions>

Graphical user interface, application

Description automatically generated

Figure 31 Profile

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in the application |
| 1 | Click on the icon button to edit profile |

Table 88. Edit profiles <steps>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 1 | Upload avatar | An “camera” icon button for uploading avatar image | Yes | Let the user choose one image from their device storage |
| 2 | Change password | An “pen” icon button for opening edit form | Yes | A form to edit will be shown |
| 3 | Edit email | An “pen” icon button for opening edit form | Yes | A form to edit will be shown |
| 4 | Edit phone number | An “pen” icon button for opening edit form | Yes | A form to edit will be shown |
| 5 | Edit address | An “pen” icon button for opening edit form | Yes | A form to edit will be shown |
| 6 | Save | Update profile info | Yes | Notify update successfully |
| 7 | Cancel | Cancel create a new account | No | Close the form |

Table 89. Edit profiles <functions>

#### 3.3.7 Workplans

Purpose

* The user manages personal workplans.

Functions

* View workplans.
* View personal activities details.
* Create personal activities.
* Edit personal activities.
* Remove personal activities.

User interface(s)

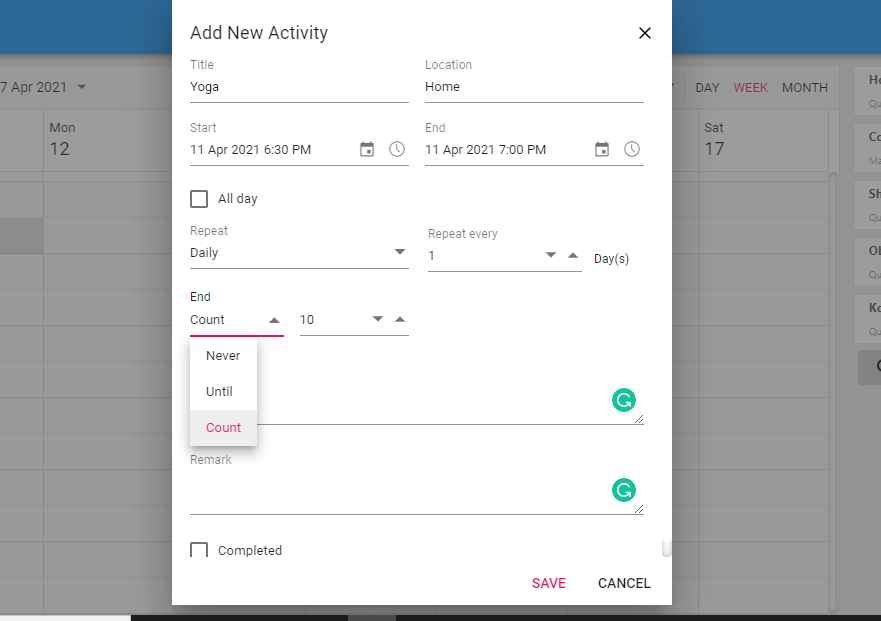
******

Figure 32 Add New Daily Activity

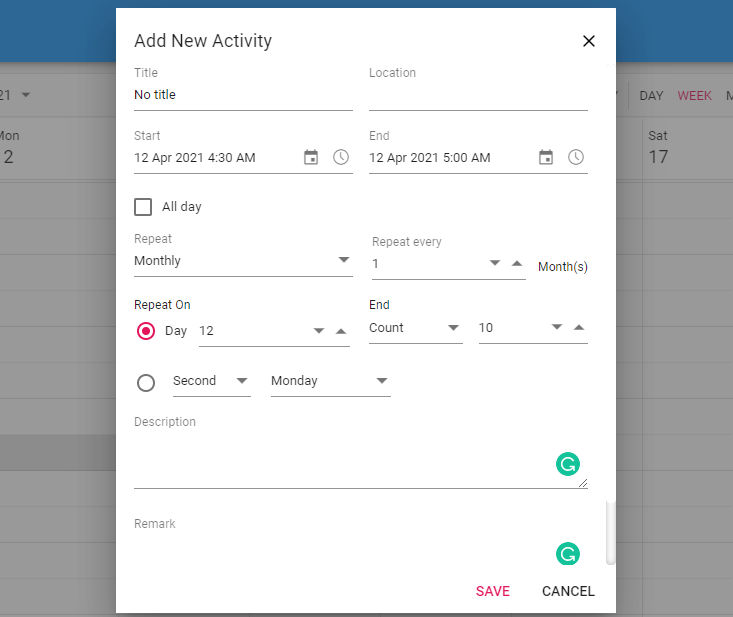


Figure 33 Add New Monthly Activity

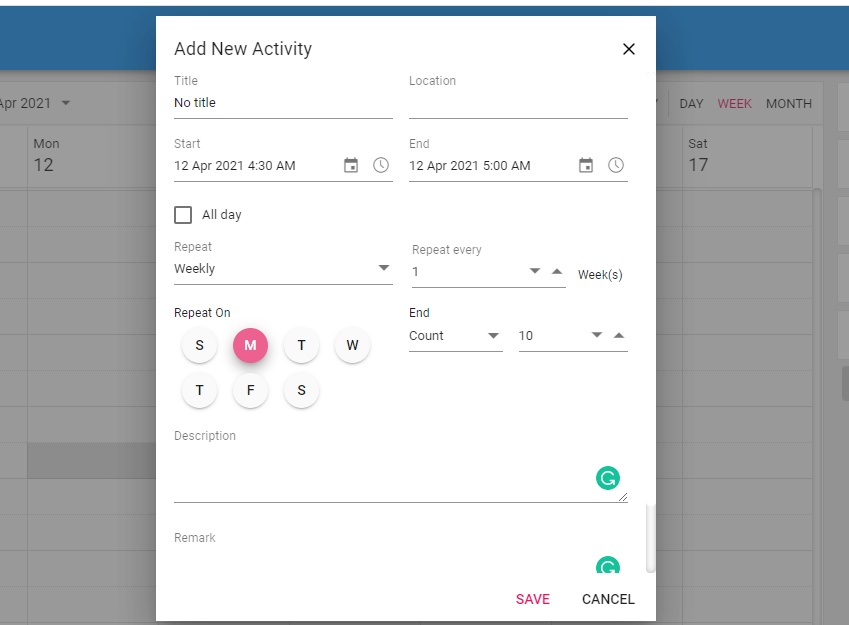


Figure 34 Add New Weekly Activity

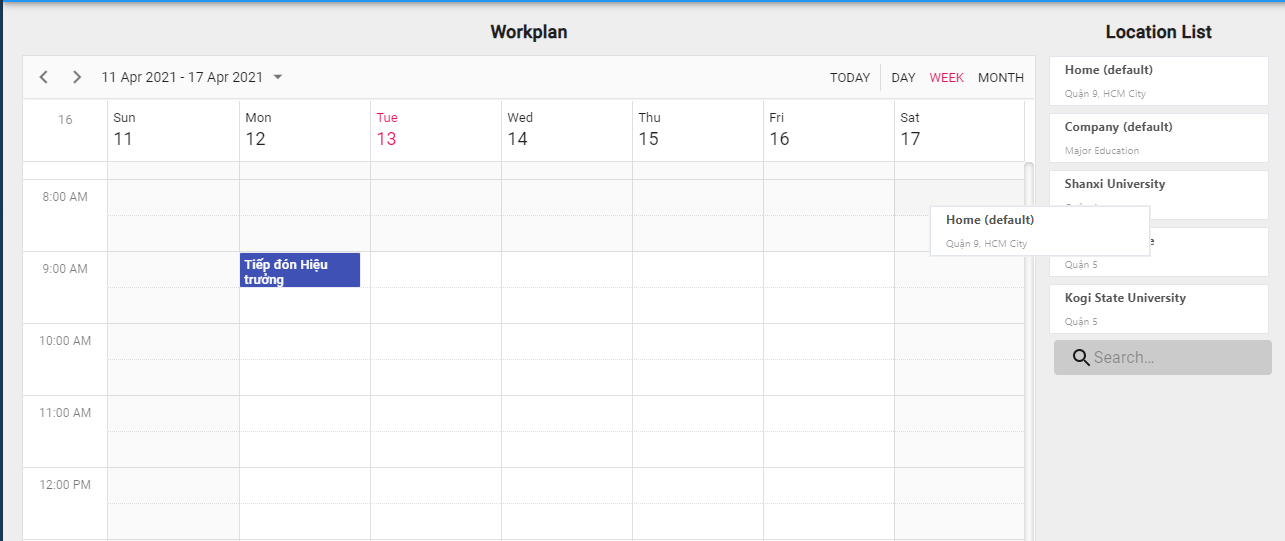


Figure 35 Drag Location Card to Add new

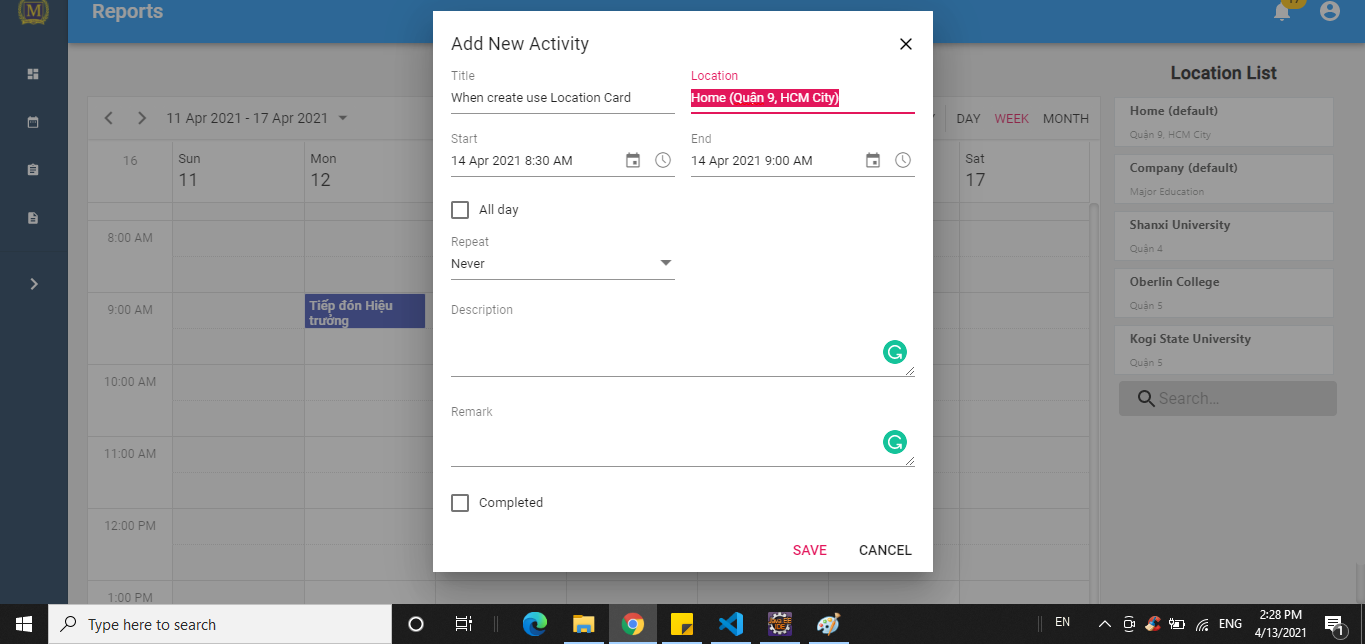


Figure 36 Add New Activity by Dragging Location Card

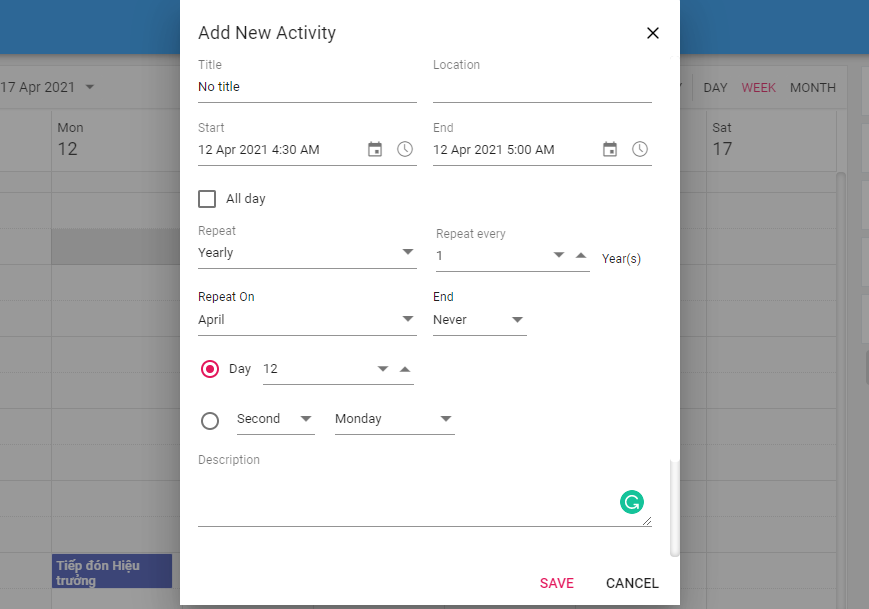


Figure 37 Add New Yearly Activity

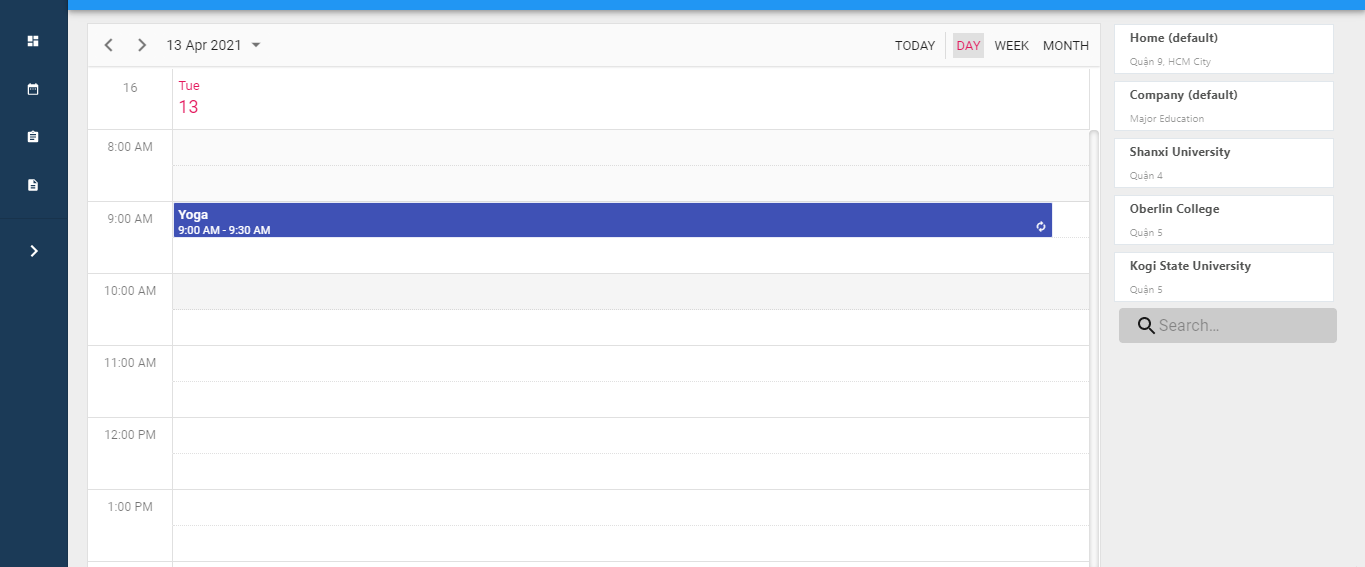


Figure 38 Day view

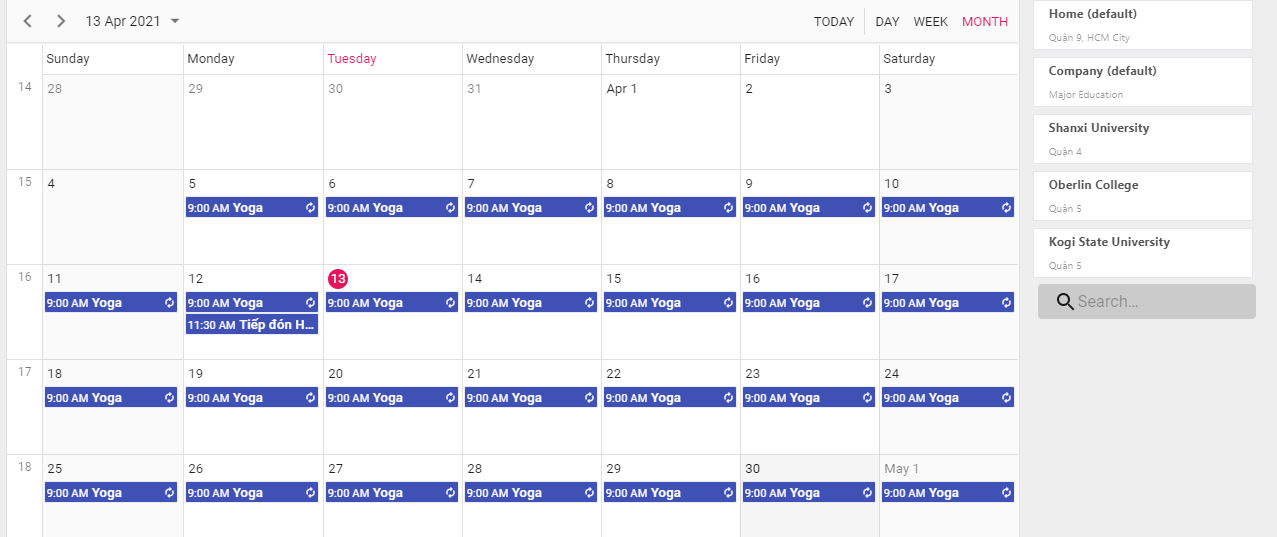


Figure 39 Monthly view

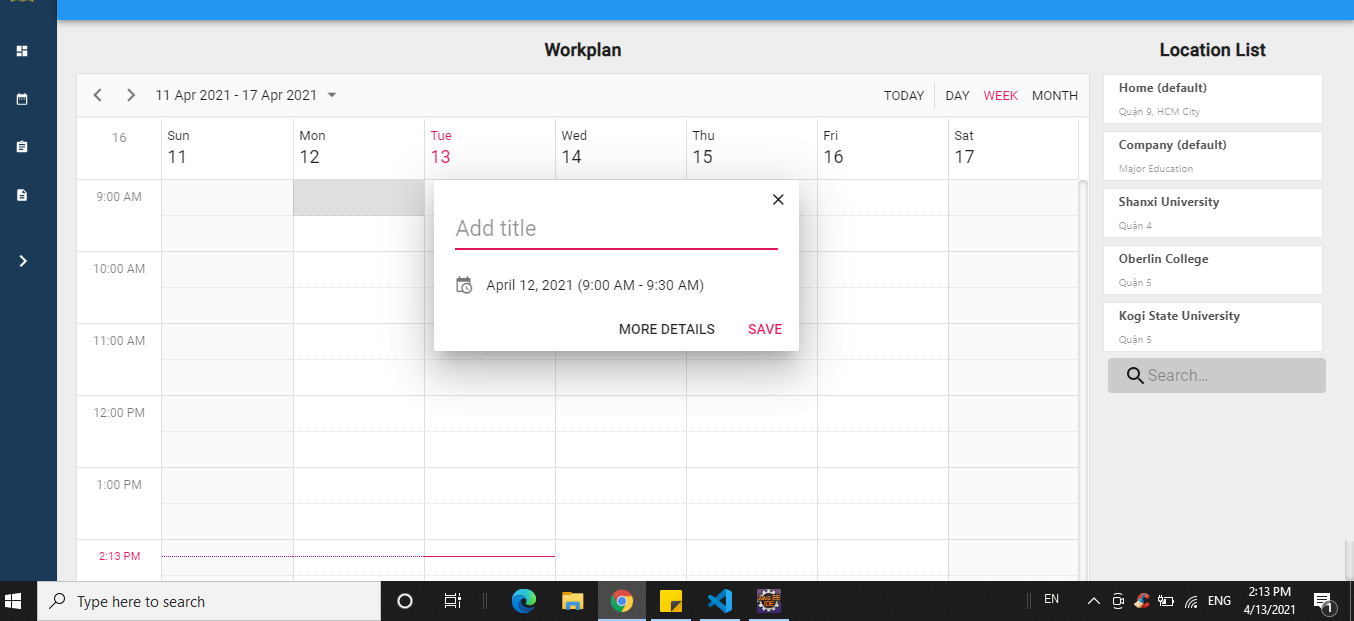


Figure 40 Quick Add Form

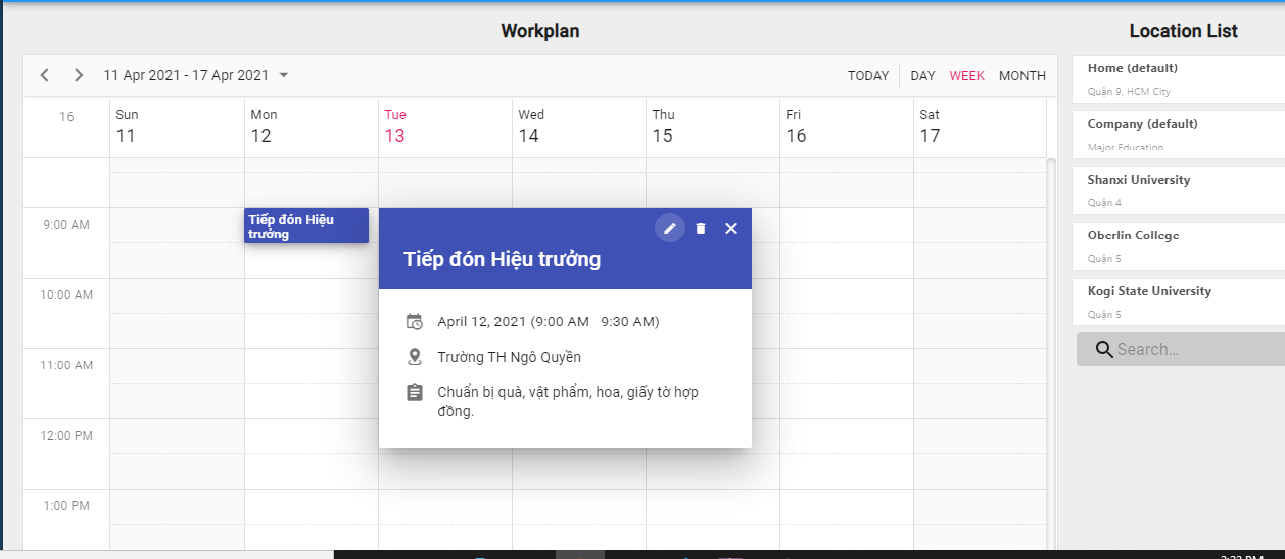


Figure 41 Quick Details

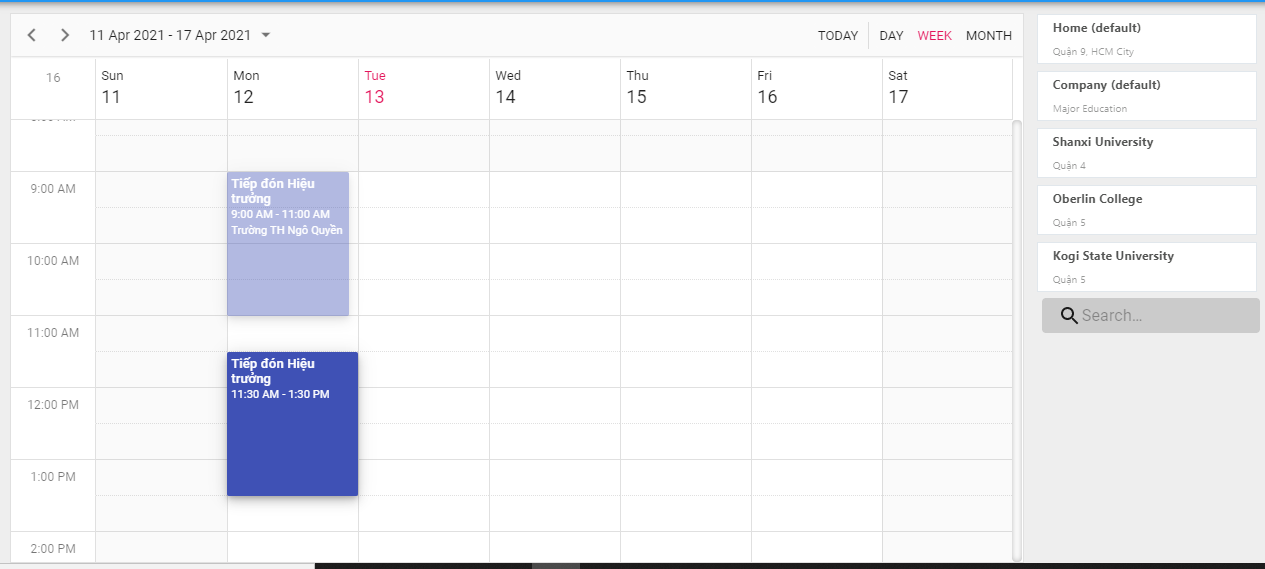


Figure 42 Edit by Drag Activity

#### 3.3.8 Dashboards

Purpose

* The sales department tracks their work process.

Functions

* View dashboards.

User interface(s)

N/A

#### 3.3.9 Services

Purpose

* The sales manager supervises services.
* The salesman tracks assigned services.

Functions

* View list of services.
* View contract’s details.
* Search services.
* Edit service’s information.

User interface(s)

Graphical user interface

Description automatically generated

Figure 43. List of Services

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Sales Manager” |
| 1 | Click on “Services” on the sidebar |

Table 90. View all Services <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 3 | Search | Search services by school name, PIC, service type | No | No | Text Field | String |

Table 91 View all Services <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Filter button | Open/Collapse Filter zone | No | An accordion which contains filters inside |
| 4 | Sort |  | No |  |
| 5 | Menu Option | Option “View details” to show more details of the table’s row data.  Option “Remove” to remove only when report does not have any manager comment. | No |  |
| 6 | Open menu options | Show menu options of actions which are allowed for a specific role | No |  |
| 7 | Change limit of the table | Select number of rows per page to display on the table (pagination) | No |  |
| 8 | First page | Move to the first page in the table | No |  |
| 9 | Previous page | Move to the page in the table | No |  |
| 10 | Next page | Move to the next page in the table | No |  |
| 11 | Last page | Move to the last page in the table | No |  |

Table 92 View all Services <functions>

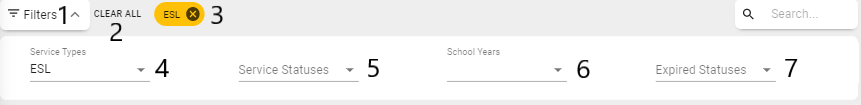


Figure 44. Services Filters

|  |  |
| --- | --- |
| **Step** | **Description** |
| 1 | Click on the filters button |

Table 93. Services Filters <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 4 | Service Types | Filter services by types | No | No | Select | String |
| 5 | Service Status | Filter services by the status | No | No | Select | String |
| 6 | School Years | Filter services by the school years | No | No | Select | String |
| 7 | Expired Status | Filter services by the expired status | No | No | Select | String |

Table 94. Services Filters<fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 2 | Clear All filters | Clear all selected filters and reset all filters to default value | No |  |
| 3 | Remove a filter | Each selected filter is display as a chip. Clicks on “x” button to remove that chip and reset the according filter to default value | No |  |

Table 95. Services Filters <functions>

Graphical user interface, website

Description automatically generated

Figure 45. Service's detail

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in as role “Sales Manager” |
| Pre-condition | Click on “View details” option on the menu item of the table |

Table 96. View Service details <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 3 | Note | Note for the service | No | No | Text Field | String |

Table 97. View Service details <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 1 | Criteria Description | Helper for the criteria of the service | No |  |
| 2 | Estimate Sales | Helper for the sales price | No |  |
| 4 | Approve | Approve the service | No |  |
| 5 | Reject | Reject the service | No |  |
| 6 | Go back | Go back to services page | No | Redirect to Services page |

Table 98. View Service details <functions>

#### 3.3.10 Logins

Purpose

* The unauthorized user logins the system.
* The user retrieves their password.

Functions

* Login with username and password.
* Forgot password.

User interface(s)

Graphical user interface

Description automatically generated

Figure 46 Login

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | Go to login page of the app |

Table 99. Login screen <steps>

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **No** | **Field Name** | **Description** | **Read only** | **Required** | **Control Type** | **Data Type** |
| 1 | Username | Username of the user | No | Yes | Text Field | String |
| 2 | Password | Password of the user | No | Yes | Text Field | Password |

Table 100. Login screen <fields>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 3 | LOG IN | Log the user into the application | Yes | Redirect to the Home page |
| 4 | Forgot password | Let the user retrieves their password | No | Redirect to the Password Reset page |

Table 101. Login screen <functions>

#### 3.3.11 Logout

Purpose

* The authorized user logouts the system

Functions

* Logout

User interface(s)

Graphical user interface, application

Description automatically generated

Figure 47 Logout

|  |  |
| --- | --- |
| **Step** | **Description** |
| Pre-condition | User logged in the application |
| 1 | Click on the user info in the top-right corner of the screen |
| 2 | In the menu list, select “Log Out” option |

Table 102. Log out <steps>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No** | **Function** | **Description** | **Validation** | **Outcome** |
| 1 | [User Menu] | A button covers the user info and the user menu | No | A menu list shown below |
| 2 | Log Out | A button covers the “Log Out” menu item | No | Redirect to Login screen |

Table 103. Log out <functions>

### 3.4 Troubleshooting

#### 3.4.1 Web app layout broke during cross-device use

Problems:

* The application responsive interface has not supported for all devices.

Workaround:

* Refresh the web app page.
* Contacts the system developers for more supports.

#### 3.4.2 Avatar or images loading time is long

Problems:

* The Internet connection is slow or unstable.

Workaround:

* Refresh the web app page.
* Connect with a better Internet connection.

#### 3.4.3 Data record loading time is long

Problems:

* The Internet connection is slow or unstable.

Workaround:

* Refresh the web app page.
* Connect with a better Internet connection.

## ４．ユーザーマニュアル

### 4.1　用語と定義

この販売管理システムはMajorEducationのため、開発されたものですから、すべての利用規約はそれらに属している。

### 4.2　システム要件

#### 4.2.1 　ハードウェア要件

* このシステムはWebアプリケーションですから、システムを使用されるとき、インターネットで接続する必要がある。
* 私たちのシステムはサーバーにデプロイされており、実行するための最小要件サービスは次のとおりです。

Webアプリの場合

|  |  |
| --- | --- |
| **ハードウェア** | **最小要件** |
| vCPU | 1 |
| オペレーションシステム | Linux Server/Window server |
| メモリー(GiB) | 1GiB |

Table 104. 「システム要件」 Web アプリの場合

API サービスの場合

|  |  |
| --- | --- |
| **Hardware** | **最小要件** |
| vCPU | 1 |
| オペレーションシステム | Linux Server/Window server |
| メモリー(GiB) | 1GiB |

Table 105. 「システム要件」 API サービスの場合

Databaseの場合

|  |  |
| --- | --- |
| **Hardware** | **最小要件** |
| vCPU | 1 |
| オペレーションシステム | Linux server/Window sẻver |
| メモリー(GiB) | 1GiB |

Table 106. 「システム要件」 Database の場合

#### 4.2.2　ソフトウェア要件

このWebアプリケーションは、Chrome（バージョン52以上）、Firefox（バージョン51以上）、Edge（バージョン14以上）、Safari（バージョン10以上）、またはOpera（バージョン38以上）ブラウザーで動作する。

### 4.3　アプリケーションの使用

#### 4.3.1　概要

この販売管理システムの主にユーザーはMajorEducationの販売部門です。

#### 4.3.2　アカウント

目標

* ユーザーアカウントを管理する。

機能

* アカウントのリストの表示
* アカウントの詳細の表示
* アカウントの検索
* アカウントの作成
* アカウントの情報の編集

ユーザーインターフェース

Graphical user interface, text, application, chat or text message

Description automatically generated

Figure 48アカウントリスト

Graphical user interface, application

Description automatically generated

Figure 49 アカウントフィルター

Graphical user interface, text, application

Description automatically generated

Figure 50 アカウントの作成

Graphical user interface, text, application

Description automatically generated

Figure 51 アカウント詳細

#### 4.3.3　スクール

目標

* スクールを管理する。

機能

* スクールのリストの表示
* スクールの詳細の表示
* スクールの検索
* スクールの作成
* スクールの情報の編集

ユーザーインターフェース

A screenshot of a computer

Description automatically generated with medium confidence

Figure 52スクールリスト

Graphical user interface, application

Description automatically generated

Figure 53 スクールフィルター

Graphical user interface, text, application, chat or text message

Description automatically generated

Figure 54 スクールの作成

Graphical user interface, application

Description automatically generated

Figure 55 スクールの作成 ＜フォーム＞

Graphical user interface, application, Teams

Description automatically generated

Figure 56スクールの作成 ＜インポートファイル＞

Graphical user interface

Description automatically generated

Figure 57スクールの詳細

#### 4.3.4　タスク

目標

* タスクを管理する。

機能

* タスクのリストの表示
* タスクの詳細の表示
* タスクの検索
* タスクの作成
* タスク情報の編集
* タスクにセールスマンの割当
* タスクの削除

ユーザーインターフェース

Graphical user interface

Description automatically generated

Figure 58タスク

Table

Description automatically generated with medium confidence

Figure 59タスクフィルター

Graphical user interface, application

Description automatically generated

Figure 60•タスクの作成

Graphical user interface

Description automatically generated with medium confidence

Figure 61タスクの作成

Graphical user interface, text, application

Description automatically generated

Figure 62•タスクにセールスマンの割当

Graphical user interface

Description automatically generated

Figure 63タスクの詳細

Graphical user interface

Description automatically generated

Figure 64タスクの詳細

#### 4.3.5　レポート

目標

* レポートを管理する。

機能

* レポートのリストの表示
* レポートの詳細の表示
* レポートの検索
* レポートの作成
* レポートの情報の編集
* コメントレポート
* レポートの削除

ユーザーインターフェース

Graphical user interface, text, application

Description automatically generated

Figure 65レポートのリスト

Table

Description automatically generated

Figure 66レポートフィルター

Graphical user interface

Description automatically generated

Figure 67レポートの作成

Graphical user interface, application

Description automatically generated

Figure 68レポートの詳細

#### 4.3.6　プロフィール

目標

* プロフィールを管理する。

機能

* プロフィールの表示
* プロファイルの編集

ユーザーインターフェース

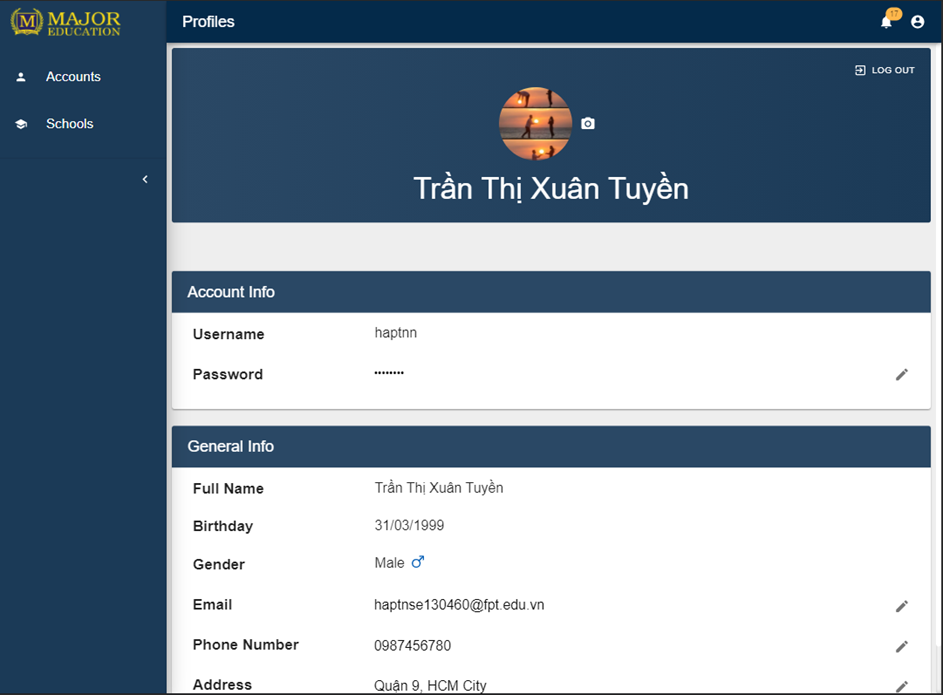


Figure 69プロフィール

#### 4.3.7　作業計画

目標

* 作業計画を管理する。

機能

* 作業計画の表示
* 個人的な活動の詳細の表示
* 個人的な活動の作成
* 個人的な活動の編集
* 個人的な活動の削除

ユーザーインターフェース

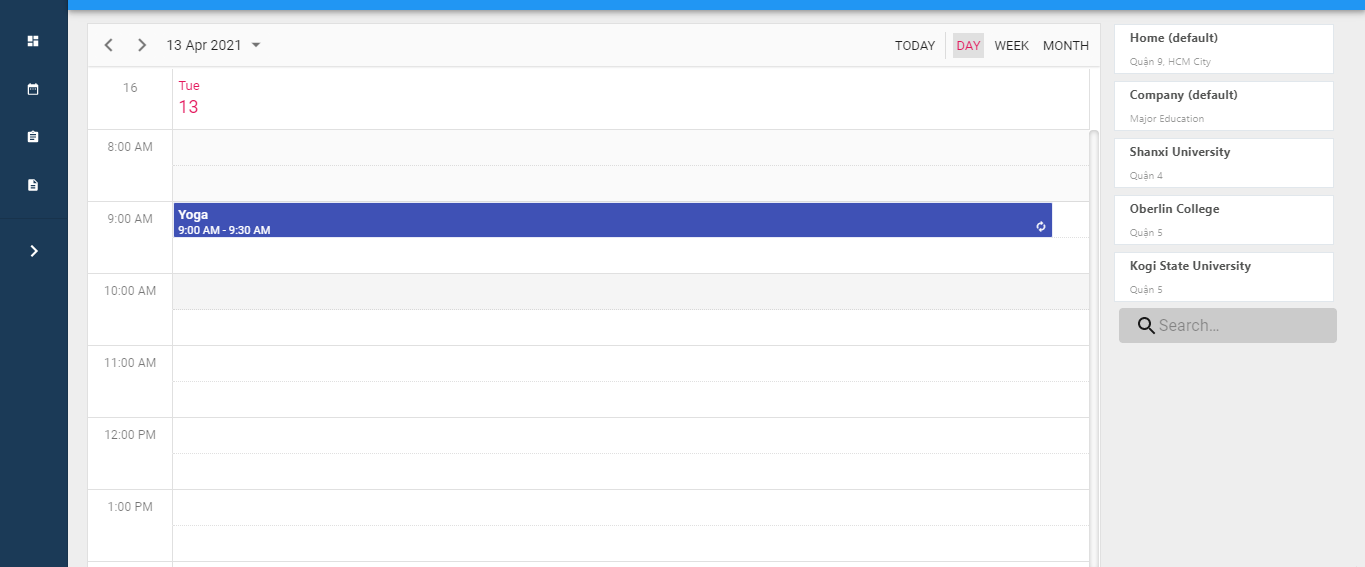


Figure 70デイビュー

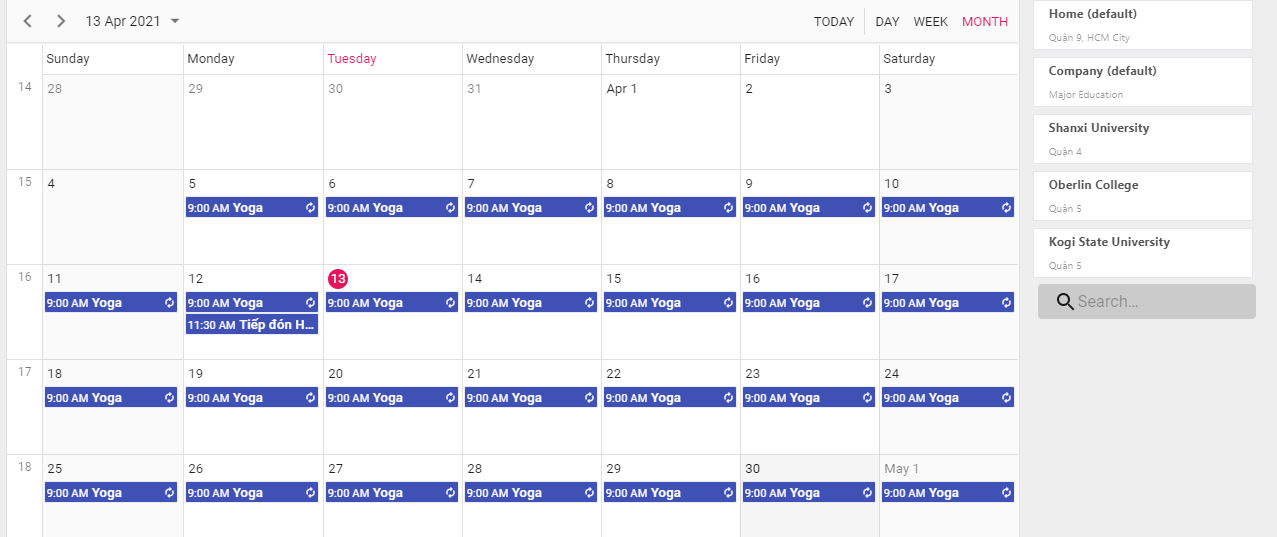


Figure 71月表示

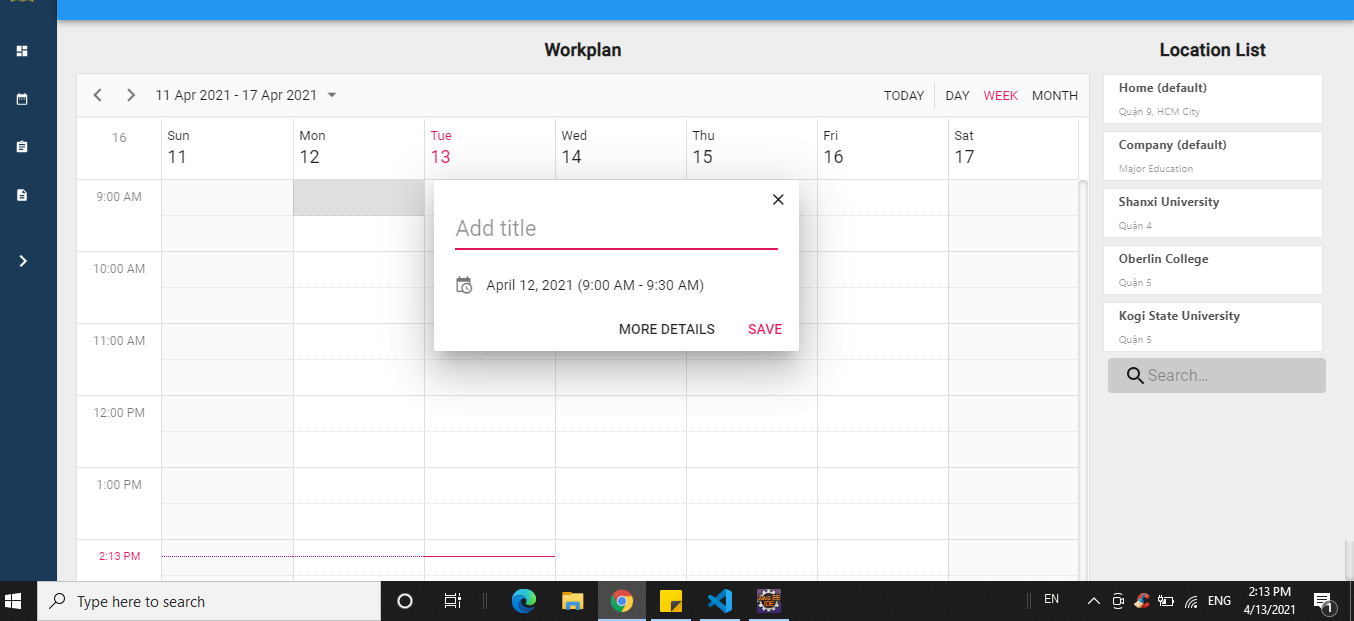


Figure 72 クイック追加

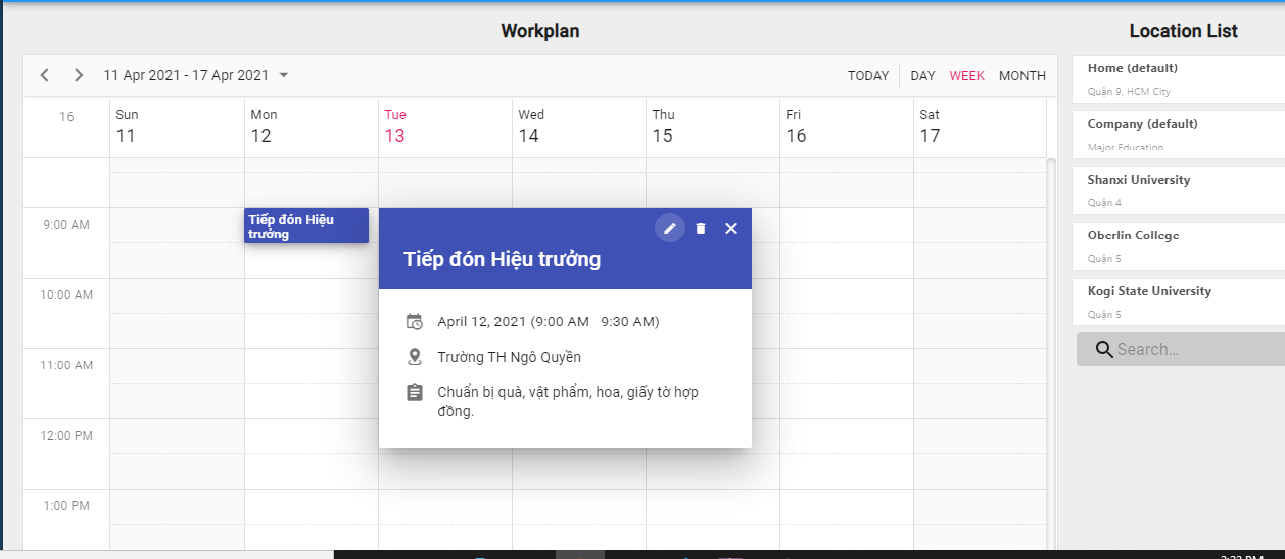


Figure 73 活動の詳細

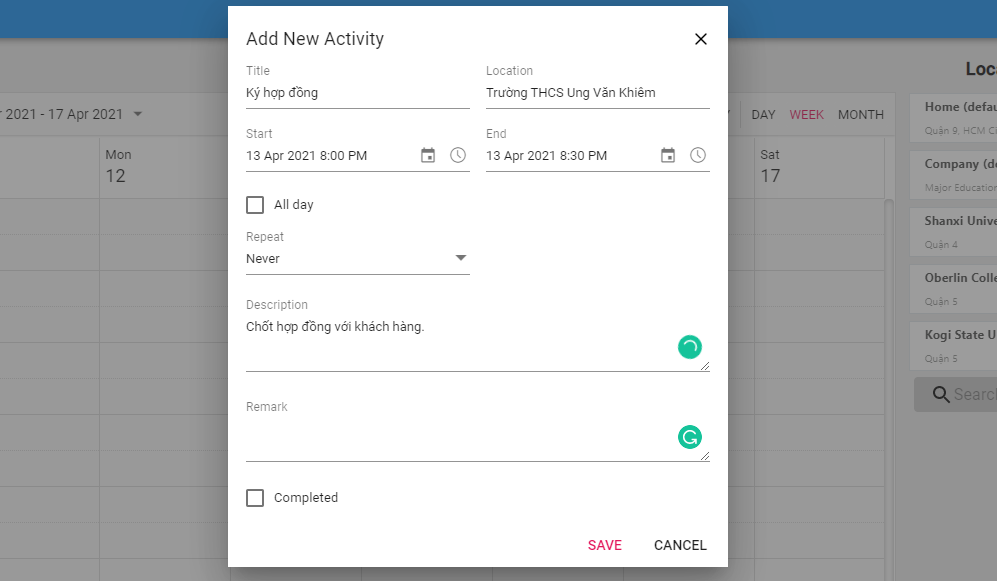


Figure 74 詳細追加

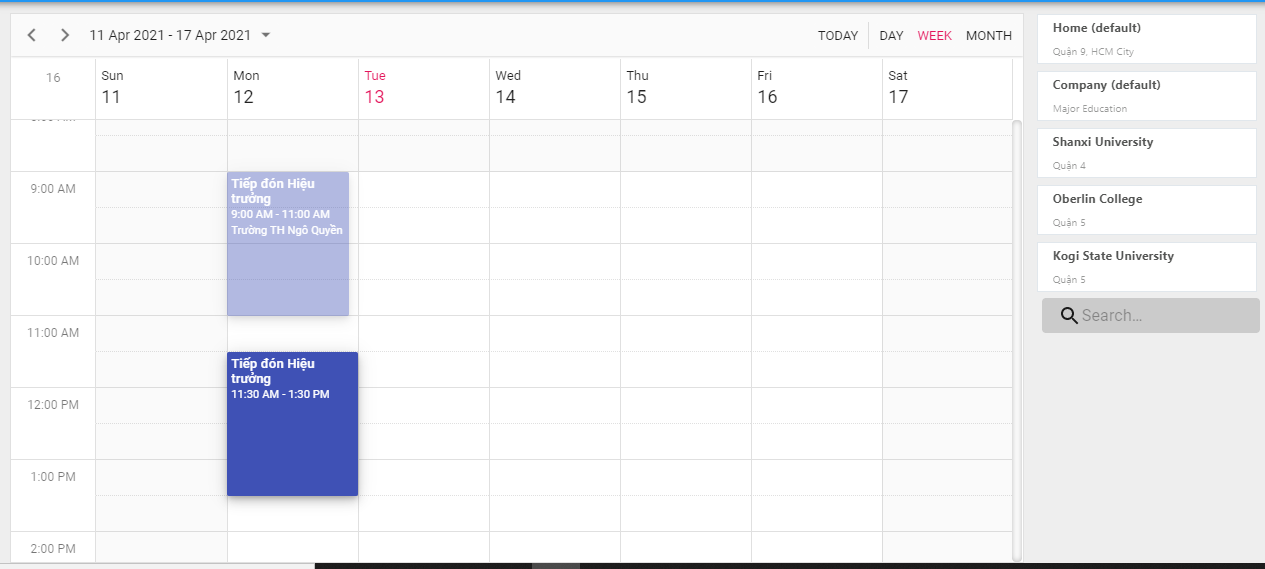


Figure 75 ドラッグして編集

#### 4.3.8　ダッシュボード

目標

* 営業部門は営業プロセスを追跡する。

機能

* ダッシュボードの表示

ユーザーインターフェース

N/A

#### 4.3.9　サービス

目標

* サービスを管理する。

機能

* サービスのリストの表示
* サービスの詳細の表示
* サービスの検索
* サービスの作成
* サービスの情報の編集

ユーザーインターフェース

Graphical user interface

Description automatically generated

Figure 76サービスのリスト

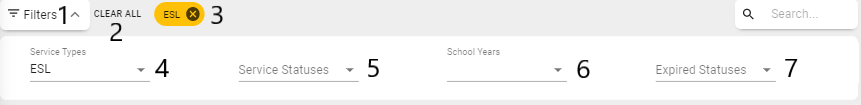


Figure 77サービスフィルター

Graphical user interface, website

Description automatically generated

Figure 78サービスの詳細

#### 4.3.10　ログイン

目標

* 許可されていないユーザーがシステムにログインする。
* ユーザーのパスワードをリセットしする。

機能

* ユーザー名とパスワードでログイン
* パスワードリマインダー

ユーザーインターフェース

Graphical user interface

Description automatically generated

Figure 79ログイン

#### 4.3.11　ログアウト

目標

* 許可されたユーザーがシステムからログアウトする。

機能

* ログアウト

ユーザーインターフェース

Graphical user interface, application

Description automatically generated

Figure 80ログアウト

### 4.4　トラブルシューティング

#### 4.4.1　Webアプリ画面レイアウトが崩れる

問題

* アプリケーションレスポンシブUIは、すべてのデバイスでまだサポートされていないことです。

解決

* Webのページをリフレッシュしてください。
* その他のサポートについては、システム開発者に連絡してください。

#### 4.4.2　画像の読み込み時間が遅い

問題

* インターネット接続が遅い。

解決

* Webのページをリフレッシュしてください。
* もっと良いインターネットに接続してください。

#### 4.4.3　テーブルデータの読み込み時間が遅い

問題

* インターネット接続が遅い。

解決

* Webのページをリフレッシュしてください。
* もっと良いインターネットに接続してください。