

CRI DMS PORTAL DOCUMENTAION.

Coconut Software's Pvt Ltd.

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Administration.

1.1 User Master.

Administration → User Master

In this User Master have two different types of User Group.

- i) Administrator
- ii) CRI Corporate User.

Administrator can create users for HO (Head Office) and Branch .Here we can specify the user group, and user id populates automatically. Here we have to add User Name then assign Login Id & password.

If we select CRI Corporate User then, we can add Branch details against the New User and same screen admin can edit the Existing User Information.

The screenshot displays a web application interface for 'User Master for HO/Branch'. The form includes the following fields and controls:

- User Group:** A dropdown menu with 'Administrator' selected. A tooltip shows two options: 'Administrator' and 'CRI Corporate Users'.
- Name:** A text input field.
- Login ID:** A text input field.
- Branch:** A dropdown menu currently set to '- None -'.
- Email ID:** A text input field.
- Active:** A checkbox, which is currently checked.
- Buttons:** 'Save' and 'Cancel' buttons.
- Fields:** 'User ID' (populated with '40014') and 'Password' (empty).

Below the form is a table listing existing users:

	UserId	Login ID	Branch	UserName	Email	Status	pwd
Edit	1	Admin	CBH	Admin	True	True	□□,E
Edit	2	habron	CBH	HABRON	hebron@hebron.com	True	
Edit	00015	00015	HOF	KRISHNA KUMAR .P	True	True	
Edit	4	KK123	None	krishnakumar	& 	True	HGF
Edit	40006	kumar	None	krishnakumar	 	True	,CE,f

1.2 User Rights.

Administration → User Rights

- i) Administrator can assign users Rights Either as admin or CRI Corporate.

If You Selected CRI Corporate User then Branch will displayed and User will filled as per the selection of Branch and we can also assign rights from an existing user by Copy From Option. In this case we have to select any Existing User the same rights will assign New User.

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User Rights.

User Group: CRI Corporate Users Branch: AHMEDABAD

User: 00999 Copy From User: 00999

....

Save **Cancel**

ii) We can view sub menu attached to main menu by selection of parent and clicking view Button.

Select Parent: Approval **View**

SELECT	PARENT	DESCRIPTION
<input type="checkbox"/>	Approval	Approval Details
<input type="checkbox"/>	Approval	Purchase Order Approval
<input type="checkbox"/>	Approval	Purchase Order Approval
<input type="checkbox"/>	Approval	Purchase Return Request Approval
<input type="checkbox"/>	Approval	Purchase Return Request Approval
<input type="checkbox"/>	Approval	Service Claim Request Approval

1.3 New Scheme.

Administration → New Scheme

In this Menu New Scheme will create by Branch wise or Dealer wise or we can apply the scheme to all Branches and Dealers.

First of all we have to fill all the required information then User can click on Add Button for selected Branch or Dealer. Once he completed adding process he can permanently save the details by clicking on save Button.

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New Scheme.

Scheme Id:

Description:

Message validity Date and Time: Active

All Branches: All Dealers:

Branch Code: Branch:

-Add

	Branch	Branch Name
Delete	CHN	CHENNAI
Delete	CBE	COIMBATORE

Dealer Code: Dealer:

-Add

	Dealer	Dealer Name
Delete	AHD0030002	AL-AMIN STEEL TRADERS-AHMEDABAD
Delete	AHD0030003	AMITA ELECTRICALS- RAJPARDI

Save **Cancel**

1.4 Main Menu Master.

Administration → Main Menu Master

In this menu admin can assign Menu Wise Rights to HO, Branch, Dealer, sub Dealer, service center, by clicking edit option form grid in this.

- A. Not Applicable Means. No Rights for Selected Menu
- B. Display by Default Means. Rights Assigned to Him.
- C. Required Permission Means .Individual Permission required for selected menu.

Main Menu Master.

Menu Title: Description:

HO: Branch:

Dealer: Sub Dealer:

Non DMS Dealer: Service Centre:

Disp Sequence: Status:

Save **Cancel**

	Title	Description	HO	Branch	Dealer	Sub Dealer	Non DMS Dealer	Service center	Seq.	Status
EDIT	Administration	Administration	1	2	0	0	0	0	1	1
EDIT	Dealer	Dealer	1	2	1	0	0	0	2	1
EDIT	Sales and Distribution	Sales and Distribution	1	2	1	1	1	1	3	1

1.5 Sub Menu Master.

Administration →Sub Menu Master

In This Sub Menu admin can assign Sub Menu Wise Rights to HO, Branch, Dealer, sub dealer, service center, by clicking edit option form grid in this.

1.6 Country Master.

Administration →Country Master

To Create and edit Country Details.

1.7 Region Master.

Administration →Region Master

To Create and edit Region/State Details.

1.8 City Master.

Administration →City Master

To Create and edit City Details.

1.9 District Master.

Administration →District Master

To Create and edit District Details.

1.10 Area Master.

Administration →Region Master

To Create and edit Area Details.

1.11. Dealer Target Control.

Administration →Region Master

In this Dealer Target Control Set for selecting branch and to view selection of materials assigned for branch by clicking on view button and target will be set by selecting month.

The screenshot shows a web application window titled "Target Control.". It features several input fields and controls:

- Branch Code:** A dropdown menu with "CBE" selected.
- Branch:** A dropdown menu with "COIMBATORE" selected.
- View:** A red button with white text.
- Selection of Sector/MatGrp/subGroup:** A dropdown menu with "CRI INDUSTRIES SPARES" selected.
- From Date:** A date picker showing "01-Apr-2008".
- To Date:** A date picker showing "30-Apr-2008".
- Month Selection:** A grid of checkboxes for the months of the year. "January", "February", and "March" are checked.
- Remarks:** A text area containing the text "Entering Target Fo Coimbatore Branch rquarterly.]."
- Buttons:** "Save" and "Cancel" buttons at the bottom.

1.12. Function Doc No Range.

Administration → Function Doc No Range

In This Form Admin Can Create Number range for all the Transactions such as MPO, NPO, Stock Dilution etc.

No Range.

Function

FYear

Start No.

Current No

...

	Transaction	Description	Year	Start No.	Current No.
Edit	ADM05	Promotional Activity Master	2008	1000	1002
Edit	APO	Advertisement Material Order	2008	1000	1018
Edit	MMT04	New Product Requisition	2008		1005
Edit	MMUATV03	Service Call Claims	2008	2000	2002
Edit	MPO	Monthly Plan Order	2008	80000	80008
Edit	NPO	Non Plan Order	2008		90008
Edit	RPO	Purchase Return Request	2008	3000	3000
Edit	SCH05	Scheme Master	2008	10000	1000010
Edit	SDSD01	Stock Dilution	2008		1017

1.13. Assign Area To Business Center.

Administration → Assign Area To Business Center

In this form we can assign area to particular business centre like Coimbatore, Mumbai etc.

1.14. Functional Approval Setting.

Administration → Assign Area To Business Center

In this Form Admin Can set Approval Level for Functions like DDP Assignment, PO, Service Claim either we can specify form and to value, maximum level required for transaction. Same time we can assign Person who will be approve transaction Assigned Level. He can save the record by clicking on the save Button.

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Functional Approval Setting.

Branch Code: AHD Branch: AHMEDABAD

Function Name: Service Call Claim

Value based:

From Value: 100000 To Value: 500000

Level: 1

Login ID: 00002—MAHESWARI KG

Active:

Save Cancel

1.15. Password Change.

Administration → Password Change

In this form Every User Can Change Password here by entering old Password, new and conforming password.



Password Change.

Name * Admin

Login ID * Admin Old Password *

New Password * Confirm New Password *

Save Cancel

Fields marked with * are mandatory.

1.16. Show Room Materials Master.

Administration → Show Room Materials

This Master Is Used for Creating Show Room Materials by entering specified value. We can also upload image by browsing image and uploading image by clicking Upload button. After Uploading that image displays in right side of the form. We can add Information by clicking Add Button. Then we can save it permanently by clicking save button, we can also edit the existing image & information by clicking on edit from below grid.

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Showroom Materials Master

Code

Nature Of Material

Description

Size


Colour Code

Approximate Price

Image File Name

Active

Name



Contact Information

Contact Serial No.

Contact Person

Address

Mobile No.

Email

CST No.

Service Tax No.

Phone No.

Fax

LST No.

Active

-Add

Sr No.	Name	Address	Mobile	Phone	Email	Fax	CST No.	LST No.	Service Tax No.	Active
Edit Delete	0	Nilesh	CBD Bellapura	9823546782	2345678	nilesh@gmail.com	2345	4567	6789	<input checked="" type="checkbox"/>

Code	Name	NATURE	DESCRIPTION	SIZE	COLOUR	APPR_PRICE	ACTIVE	IMAGE FILE	
Edit	2	Showroom	Plastic	Green Plastic with white coat.	200 Meter	Red	200000.00	True	2.jpg
Edit	CDM001	Name	nature	de	SIZE1	Colour	1000.00	True	CDM001.jpg

TOOLS:

1.17. Define Payment Terms.

Tools → Customization → Define payment Term

In this Form is used to Administrator Can Define Payment terms for transaction. In this forms all the * indicating fields are mandatory. At the same time we can edit an existing Defined Payment terms from below grid by clicking on Edit.

	Code *	Description *	Active
Edit	01	Cash	False
Edit	02	Cheque	True
Edit	03	NEFT	True
Edit	04	ON-TRAF	True
Edit	05	RTGS	True
Edit	06	NEFT	True

Fields marked with * are mandatory

1.18. Assign Users to Branch For Approval.

Tools → Customization → Assign Users to Branch Approval

Administrator Can Assign Users to Branch for Approval of transaction like PO,DDP, Service Claim etc. Whatever we assigned here for the user based on that all approval level comes for each transaction. In this form all the * indicating fields are mandatory and we can edit an existing Information by clicking an edit from the below grid.

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Assign Users To Branch For approval

Login ID * MAHESWARI KG
Branch * AHMEDABAD
Active

Save **Cancel**

	Login ID *	Branch *	Active
Edit	00002	CBE	True
Edit	00015	CBE	True
Edit	00024	CBE	True
Edit	00039	CHN	True
Edit	00068	PUN	True
Edit	00071	PUN	True

Fields marked with * are mandatory.

1.19. Customer Account Group.

Tools → Customization → Customer Account Group

In this Customization form is used to Administrator Can Create Customer Account Group like Government, Home Sector etc. for transaction. In this * indicating fields are mandatory.

Customer Account Group

Account Group* HS
Description* home sector1
Active

Save **Cancel**

	Account Group*	Description*	Active
Edit	GOV	Government	True
Edit	HS	home sector1	True
Edit	IND	INDUSTRIES	True
Edit	INSI	Institutional	True
Edit	TCM	Technical Club Members	True

Fields marked with * are mandatory.

1.20. Feed Back Type.

Tools → Customization → Feed back Type

This master is Used to Create Feedback type like Service, business etc. All the * indicating fields are mandatory.

1.21. Doc No Range.

Tools → Customization → Doc No Range

In this form is Used to Administrator Can Create Document Number(Doc No) Range for selected year can also enter start, Current no of selected doc type in this * indicating fields are mandatory.

	Company *	Doc Type*	FYear*	Start No	Current No
Edit	1000	FI	2008	1000	2000
Edit	1000	PD	2008	100008093000001	100008093000008
Edit	1000	PR	2008	100008091000001	100008091000010

1.22. Installation characteristic master.

Tools → Customization → Installation Characteristic master

In this Master is used to create Installation information like well, Bore well etc. In this form all the * indicating fields are mandatory.

1.23. Assign Installation characteristic to Product Sub Group.

Tools →Customization →Installation Characteristic master to Product Sub Group

In this Master, Installation characteristic assign to product sub group. In this form all the * indicating fields are mandatory.

1.24. Assign Executives to Dealer.

Tools → Customization → Assign Executives to Dealer

In this Master administrator can assign Executives to selected Dealer by selecting executive name and dealer name. In this form all * indicating fields are mandatory. (Ref: Tools-Customization Definition)

1.25. Assign Distributor to Dealer.

Tools → Customization → Assign Distributor to Dealer

In this Master, administrator can assign distributor to selected Dealer in this * indicating fields are mandatory. (Ref: Tools-Customization Definition)

1.26. Monthly Plan Order Configuration.

Tools → Customization → Monthly Plan Order Configuration

In this Master, administrator can set branch wise monthly plan order by entering specified Value. In this * indicating fields are mandatory. (Ref: Tools-Customization Definition)

1.27. Type of Target.

Tools → Customization → Type of target

In this Master, administrator can set target type for selected branch. in this * indicating fields are mandatory.

1.28. Branch Mat Group Target Period.

Tools → Customization → Branch Mat Group Target Period

In this Master, administrator can set target Period for selected branch by Mat Group wise .in this * indicating fields are mandatory.

1.29. Branch Mat Sub Group Target Period.

Tools → Customization → Branch Mat Sub Group Target Period

In this Master, administrator can set target Period for selected branch by Mat Sub Group wise .in this * indicating fields are mandatory.

1.30. Branch Sector Target Period.

Tools → Customization → Branch Sector Group Target Period

In this Master, administrator can set Sector wise target period. In this form all the * indicating fields are mandatory.

1.31. Assign Product Sub Group to Executives

Tools → Customization → Assign Product Sub Group to Executives

In this Master, administrator can assign Product Sub Group. in this * indicating fields are mandatory.

1.32. Activity Groups

Tools → Customization → Activity Groups

Activity Group is defined for Activity like Advertising, Mechanic Meet etc. in this * indicating fields are mandatory.

1.33. Activity Master

Tools → Customization → Activity Master

Activity Master is defined based on selection activity Group of Like Wall Painting, Exchange offer etc. in this * indicating fields are mandatory.(Ref:Tools-Customization Definition)

1.34. Competitor Master

Tools → Customization → Competitor Master

Competitor Master created by Entering Competitor Code and Name. In this all the * indicating fields are mandatory.

1.35. Advertisement Discount

Tools → Customization → Advertisement Master

In this Master, Advertisement Discount specified against advertisement material code. In this form all the * indicating fields are mandatory.

1.37. Dealer Sector Avg Val.

Tools → Customization → Advertisement Master

In This Master, Admin can set Avg Val against selected Dealer and sector. In this form all the * indicating fields are mandatory.

1.38. Dealer Mat Group Avg Val.

In This Master, Admin can set Avg Val against selected Dealer and material group * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.39. Dealer Mat Sub Group Avg Val.

In This Master,Admin can set Avg Val against selected Dealer and material Sub group * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.40. Assign Advertisement Materials to Branch.

This Master is used to assign advertisement materials to selected branch. * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.41. Assign Forecast Period.

This Masters is Used for material forecasting transaction. Purpose. * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.42. Mediator Type.

This Masters is Used Create Mediator Type like. Bore well Operator, plumber etc. * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.43. Defect Master.

This Masters is Used Create Defect Type Details like. Winding Problem, Rotor Problem etc.* indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.44. Enquiry Loss Reason.

This Masters is Used Create Enquiry Loss Reason * indicating fields are mandatory. . (Ref: Tools-Customization Definition)

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1.45. Sales Return Reason.

This Master is Created By Entering Specified Value and used in Purchase Return Transaction purpose. * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.46. Customer Type.

In this Master Customer Type Defined like Institutional Customers, Government Customer etc * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.47. Define Other Charges For Service.

In this Master Charges Defined for service like vat Tax, Freight etc * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.48. Complaint Reason.

Complaint Reason created like low Voltage, Pump Kept In Humid Conditions etc for transaction purpose. * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.49. Complaint Type.

This Master Used to Create Complaint Type like Local Complaint Winding ,Burnout etc for transaction purpose. * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.50. Transport Mode.

This General Master Used to. Create Transport type like Air, Road Rail etc * indicating fields are mandatory. (Ref:Tools-Customization Definition)

1.51. Title.

This General Master Used to. Create Title like Mr., M/s etc * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.52. Status.

This General Master Used to. Create Status like Approved., Pending ,Rejected etc * indicating fields are mandatory. (Ref: Tools-Customization Definition)

1.53. Status.

This General Master Used to. Create Status like Approved., Pending ,Rejected etc * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

1.54. Industry Sector.

This General Master Used to. Create Industry Sector like Chemical industry. Refinery etc * indicating fields are mandatory. .(Ref:Tools-Customization Definition)

Dealer.**2.1. New Customer.****Dealer → New Customer**

In this Form Branch Executive can create New Customer by entering Specified Value as shown below. In that New customer created by based on their Account Groups like Government, Industries, Technical club members etc.

The screenshot shows a web form titled "New Customer." with the following fields and values:

Account Group	Government	Customer Code	GOV10	Title	Mr
Name		Middle		Last	
Address					
Country	INDIA	Region/State	Maharashtra		
District	-- None --	City	-- None --		
Area	-- None --				
Mobile		Telephone			
Fax		Pin Code			
Industry	Manufacturing	Customer Type	Institutional Customers		
Remark					

At the bottom of the form, there are two buttons: "Save" and "Cancel".

2.2. New Dealer Request.**Dealer → New Dealer Request**

In this Form Branch executive can create New Customer can created By Entering Specified Value as shown in the below screen and same can approve by admin login.

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New Dealer Approval

Dealer Code	<input type="text"/>		
Name	<input type="text"/>		
Address	<input type="text"/>	
Country	INDIA	Region/State	Maharashtra
District	-- None --	City	-- None --
Area	-- None --		
Mobile	<input type="text"/>	Telephone	<input type="text"/>
Fax	<input type="text"/>	Pin Code	<input type="text"/>
Remark	<input type="text"/>		

....

Save **Cancel**

2.3. New Dealer Detail.

Dealer → New Dealer Request

In this form User have to click on New Dealer. User can create new dealer by entering specified value in Approved, in progress and Rejected Dealer In grid as shown below

Dealer Detail

New Dealer	Approved	In Progress	Rejected
------------	----------	-------------	----------

No Data Found

OFFICIAL	ASSET	BANK DETAILS	FAMILY DETAILS	COMMUNICATION	PERSONAL	PARTNERSHIP
----------	-------	--------------	----------------	---------------	----------	-------------

Official

Shop Name	<input type="text"/>		
Area	-- None --	Region	<input type="text"/>
Tax Details			
STRC No	<input type="text"/>		
STRC /Applied Date	16-May-2008	VAT Enabled	<input type="text"/>
CSTRC No	<input type="text"/>	VAT No	<input type="text"/>
CSTRC /Applied Date	16-May-2008	VAT Date	16-May-2008
What Category Of Business Is Dealer Involved In ?			
Firm Type	-- None --	Others Specify	<input type="text"/>
Document Details		Transportation Details	

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OFFICIAL	ASSET	BANK DETAILS	FAMILY DETAILS	COMMUNICATION	PERSONAL	PARTNERSHIP
Asset Details						
Partner Sno	<input type="text"/>	Partner Name	<input type="text"/>			
Partnership Asset Details						
Asset Sno	<input type="text"/>	Asset Type	<input type="text"/>	Location	<input type="text"/>	
Address Details						
Address 1	<input type="text"/>					<input type="button" value="▲"/>
Address 2	<input type="text"/>					<input type="button" value="▲"/>
Phone	<input type="text"/>	Fax	<input type="text"/>			
Country	INDIA	Region/State	Maharashtra			
District	-- None --	City	-- None --			
Area	-- None --					<input type="button" value="▲"/>
Pin Code	<input type="text"/>	Std Code	<input type="text"/>			

2.4 Monthly Plan Order (MPO)

Dealer → Monthly Plan Order

In this form Dealer can Place Order on Monthly Basis. Dealer can search Material by entering initial information in search text box and clicking search option item will be populated based on search criteria. Then we have to enter Qty (Based on our Requirement) in Total Qty text box. If we have any urgent for that Product we put that Urgent Qty in Urgent Qty Field but it accepts only Maximum 40% of the Total Qty. After entering required information we can add details and same time we can edit or delete by clicking Edit/Delete button from below grid. After adding all required items we have to Accept Terms & Conditions by selecting checkbox. This checkbox is Mandatory after that only we can save the Record. For this Users don't have any Approvals.

Monthly Plan Order					
Dealer Code/ Name	<input type="text"/>	<input type="button" value="Search"/>			
Dealer Code	AHDA0030002	Dealer	AL-AMIN STEEL TRADERS.AHMEDABAD		
Outstanding Amount:	344366.00	Advance MPO balance:	0		
Product	MONOBLOCK (FROM 2 HP)	<input type="text"/>	<input type="button" value="Search"/>		
Item Code	SC01ACHMTIA75450G2	Item	10 HP 2880 65x50 10H3 Acl 3P		
Sale Type	GJT VAT @ 4%				
Pay Type	Cheque	Instrument No.	<input type="text"/>	Payment Value	<input type="text"/>
Total Qty	1	Urgent Qty	0	Req. Date	16-Jun-2008
....					
<input type="button" value="-Add"/>					
Penalty will be charged for canceling/reducing the ordered qty.					
<input type="checkbox"/> agree with the terms and conditions. Terms & Condition					
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					

2.5. Non Plan Order. (NPO)

Dealer →Non Plan Order

In this Form Dealer can place any Non Plan order. Dealer can search material by entering initial information in search text and clicking search option item will be populated based on search criteria. After entering required information user can add details and same time he can edit and Delete an existing record by clicking edit/Delete button from bellow grid. After adding all required items user have to Accept Terms & Conditions by selecting checkbox. This checkbox is Mandatory after that only we can save the Record then these records go for approval.

Non Plan Order

Dealer Code: Dealer:

Outstanding Amount: 15391.42 Advance MPO balance: 0

Product:

Item Code: Item:

Pay Type: Instrument No.: Payment Value:

Qty: Req. Date:

	Product	Item	Qty	UOM	Price	Total	Req. Date	MPU Pending Qty	NPU Pending Qty
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	MONOBLOCK (FROM 2 HP)	3 HP 1440 75x65 LH (CD-1) A 3P ESP	1	No.	14401.00	14401.00	22 Apr 2008	0	0
	Total		1			14,401.00			

I agree with the terms and conditions. Terms & Condition

2.6. Purchase Order Details.

Dealer →PO View/Amend

In this form is used for user (Dealer/Admin/Branch) can view Information Regarding Approved, Pending and Rejected Purchase Order details. By Clicking Approved, Pending Rejected Button after that user can view the details of the PO by clicking the Detail button from the below grid and also here user can edit an existing records. After that user can click the Recalculate Pricing button if users do any changes in an existing record, then only the Price will be recalculated. After that User can save the records by clicking the save button. If user has changed any records after that it goes for approval.

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Purchase Order Details

Dealer Code: Dealer:

Approved
 Pending
 Rejected

From Date: To Date:

Doc. Type	Doc. No.	Doc. Date	Approved
MPO	100108170000018	4/16/2008 11:59:39 AM	<input type="checkbox"/>

Dealer Purchase Order

Dealer Code: Dealer:

Outstanding Amount: 344366.00 Advance MPO balance: 0

....

PO No. : 1055 Advertisement Purchase Order
Dealer Purchase Order

Sr. No.	Product	Item Code	Item	Req. Qty	Approved Qty.	Price	Total	Req. Date	Approved on	Approved by	Remarks	Original Qty	Sale Type	Min. Delivery Lead Time (in Days)	Billed Qty.
10		PCXABANBEN01	BANNER - BENGALI	<input type="text" value="60"/>	60.00	0.00	0.00	<input type="text" value="05-May-2008"/>	5/5/2008 6:04:29 PM	00579		60.00	0	0	
			Total	60			0.00								

2.7. Purchase Return Request.

Dealer → Purchase Return Request

In this Form Dealer Can Send Request for Purchase Return Approval. By Entering Specified Value as mentioned in below screen. After that only it goes to Purchase return Approval.

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Purchase Return Request

Dealer Code/ Name **Search**

Dealer Code: AHDA0030002 Dealer: AL-AMIN STEEL TRADERS.AHMEDABAD

Outstanding Amount: 344366.00 Advance MPO balance: 0

Product: MONOBLOCK (FROM 2 HP) **Search**

Item Code: SC01AC8MTIA22CD1H Item: 3 HP 1440 75x65 LH(CD-1) A 3P ESP

Sale Type: GJT VAT @ 4%

....
Add

I agree with the terms and conditions. [Terms & Condition](#)

Save **Cancel**

2.8. Dealer Development Plan (DDP) Activity Assignment:

Dealer →DDP Activity Assignment

Here Branch Executives /Admin can set DDP for Selected Dealer, by entering the specified value as mentioned in below screen after that it goes to approval by clicking on save Button (DDP Activity Assignment)

Dealer Development Plan

Sr.No: 1013

Activity Group: Nulla1

Activity Description: Test

Dealer Code: AHDA0030002 Dealer: AL-AMIN STEEL TRADERS.AHMEDABAD

From Date: To Date:

Activity Objective *

Budget (Rs.): Remark:

Dealer Contribution (Rs.): Remark:

Exp. Result On Sales (Rs.): Active:

....
Save **Cancel**

2.9 Minimum Stock Level Group wise:

Dealer →DDP Activity Assignment

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For this Minimum Stock Level values fetched from our DMS Desktop application. Totally depends upon the Desktop Application.

Dealer Minimum Stock Group Wise.

Id: MMT011000

Dealer Code: AHDA0030282 | Dealer Name: MARUTI ELECTRICALS.,BOPAL

From Date: 16-May-2008 | To Date: 16-May-2008

Product: [Empty]

Minimum Qty.: [Empty] | Minimum Value: [Empty]

+Add

No Data Found

Save Cancel

2.10 Minimum Stock Level Product wise

Dealer → DDP Activity Assignment

For this Minimum Stock Level values fetched from our DMS Desktop application. Totally depends upon Desktop Application

Dealer Minimum Stock Product Wise.

Id: MMT111000

Dealer Code: AHDA0030282 | Dealer Name: MARUTI ELECTRICALS.,BOPAL

From Date: 16-May-2008 | To Date: 16-May-2008

Product: [Empty]

Minimum Qty.: [Empty] | Minimum Value: [Empty]

+Add

No Data Found

Save Cancel

3.2. Stock Reservation Request.

Sales and Distribution → Stock Reservation Request

In this form is used to dealer can maintain some products as a reserve stock for this user have to fill the specified value as shown in below Screen

Item	Description	Min. Qty.	Max. Qty.
A1E	BELT PUMP	5	50

3.3. Competitor Price Entry.

Sales and Distribution → Competitor Price Entry.

In this Form is used to Dealer can enter Competitor Price and Other information as specified in the below screen. After entering the specified value user can save the value by clicking on save button and user can edit an existing information also by clicking the Edit from the below grid of the form as shown II Figure. All the * indicating fields are Mandatory.

Item	Description	Min. Qty.	Max. Qty.
A1E	BELT PUMP	5	50

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	SRNO	PRODUCT CODE	COMPETITOR MODEL	COMPETITOR PRICE
Edit	19	NA		10000

Fields marked with * are mandatory.

3.4. Monthly Stock.

Sales and Distribution → Monthly Stock

In Monthly stock NON-DMS-Dealer can specify monthly stock details by entering the specified value as shown below fig.

Monthly Stock.

Dealer Code: Dealer:

Product:

Year: Month:

Opening Qty: Closing Qty:

....

No Data Found

3.5. Dealer Targets Entry.

Sales and Distribution → Dealer Targets Entry

In this form is used to Branch Executive can set target to Dealer.

Dealer Targets in Quantity

Dealer Code: Dealer:

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Dealer Targets in Quantity

Dealer Code

AHDA0030002

Dealer

AL-AMIN STEEL TRADERS.AHMEDABAD

Save

Cancel

Dealer Target Entry

No Data Found

Dealer Off take For Last Year

Code	Description	April	May	June	July	August	September	October
A2A	OPEN WELL SUBMERSIBLE PUMPS (FROM 3 HP)	1	0	0	0	0	0	0
H1C	OPEN WELL SUBMERSIBLE	6	0	1	0	0	0	0

Scheme.

4.1. Scheme View.

In this is used to Branch and Dealer can View Created Scheme. User can also place purchase order by clicking on Place purchase Order Link. Then user can make a Non Plan Order. (Ref: 2.6 NPO)

Schemes View	
Scheme No.	Description
1000015	Feel Free to contact Krishnakumar

[Place Purchase Order](#)

Non Plan Order					
Dealer Code/ Name	<input type="text"/>	<input type="button" value="Search"/>	Dealer	AL-AMIN STEEL TRADERS.AHMEDABAD	
Dealer Code	AHDA0030002		Advance MPO balance:	0	
Outstanding Amount:	344366.00		Product	MONOBLOCK (FROM 2 HP)	<input type="button" value="Search"/>
Item Code	SC01AC8MTIA22CD11		Item	3 HP 1440 75x65 LH(CD-1) A 3P ESP	
Sale Type	GJT VAT @ 4%		Pay Type	Cheque	Instrument No.
Qty	1	Number	Payment Value	<input type="text"/>	
			Req. Date	16-May-2008	
....					
<input type="button" value="-Add"/>					
<input type="checkbox"/> I agree with the terms and conditions.			Terms & Condition		
<input type="button" value="Save"/>			<input type="button" value="Cancel"/>		

Service.

5.1. Warranty Registration.

In This Form by Entering Valid Serial No person can view warranty Registration Details he can also add customer Details in by clicking on save button.

Warranty Registration

Serial No. **View**

Item 1HP 25D CSS-3 1PH H.OPEN WELL(MS)

No Installation Characteristics assigned for the Material !

Pipeline Information (Applicable Only For Pumps)

*	Pipe Size	Material	Horizontal Length (Feet)	Vertical Length (Feet)	No Of Bends	No of Check Valves
SUCTION	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
DELIVERY	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Voltage Information (Applicable Only for Motors and Pumps)

*	Supply Voltage	Running Voltage	Current In Amps	Drop in Voltage
RY	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
YB	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
BR	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Customer Details

Customer Details.

Name

Address

Place

Area Details.

Country Region/State

District City

Area

PinCode

Res.Phone No. Mobile No.

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The screenshot shows a web form for user registration. It is divided into several sections:

- Name:** A text input field.
- Address:** A text input field with a small dropdown arrow on the right.
- Place:** A text input field.
- Area Details:**
 - Country:** A dropdown menu with "INDIA" selected.
 - Region/State:** A dropdown menu with "Maharashtra" selected.
 - District:** A dropdown menu with "-- None --" selected.
 - City:** A dropdown menu with "-- None --" selected.
 - Area:** A dropdown menu with "-- None --" selected.
 - PinCode:** A text input field.
- Res. Phone No.:** A text input field.
- Mobile No.:** A text input field.
- Invoice Details:**
 - Invoice No.:** A text input field.
 - Invoice Date:** A date picker showing "16-May-2008".
- Buttons:** Two red buttons labeled "Save" and "Cancel" are positioned at the bottom center.

5.2. Serial No History.

By Entering Valid Serial No and clicking on view button person can view serial no history in grid

Fig: 1

The screenshot displays the "Serial No. History" interface. It includes:

- Search Area:** A text input field labeled "Sr No ^" and another labeled "Item Code". To the right of the "Sr No ^" field is a red "View" button.
- Description:** A text input field labeled "Description" is located to the right of the "Item Code" field.
- Customer Details:** A section below the search area with the heading "Customer Details".

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Fig: II

Serial No. History

Sr No ^ View

Item Code 1.5HP 50D CSS-9 1PH H.OPEN WELL(SS) (4m)

Branch	Document	Doc No.	Doc. Date	Party Code	Party Name	Warranty Status
C01	SST	C01 C0708SST101737	10-Jul-2007	STOCK ADJUSTMENT		
SBD	SSI	SBDC0708SSI172	13-Jul-2007	SBDL0010001	C.R.I. PUMPS (P) LTD - UNIT 1. HO	
SBD	INV	SBDC0708SSV2784	11-Aug-2007	SBDA0030209	KRISHNA ENGINEERING CO, SECUNDERABAD	09-Oct-2008

Customer Details

No Data Found

5.3. Service Call Entry.

In This Form By entering valid serial no he can view pump set details, Filed observation details, Service Details. or can create new Service call Entry For Entered Serial No .

Service Call

Sr No. View Create

Item Code 3 HP 2880 50x40 H3-40 AcI 3P

Pump Set Details

Type	Model	RPM	Phase	Serial No	Size	Warranty Period
Monoblock	2HP		3	0		23-Feb-2009

Field Observation Details

Characteristic	Characteristics	Value
01	Application (e.g Agri, Home, Industry)	
03	Borewell	
04	Total Depth	
05	REMARKS	
06	RY - Supply Voltage	
08	test	

Service Details

	SCR No.	Customer Name	Complaint Date and Time	Complaint	Status
View	4		19-Apr-2008		Closed
View	3	Testing	19-Apr-2008		Closed

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5.4. Service Call Report.

In this Form Can View Service Call Report by Entering Valid Serial No.

5.5. Service Call Report.

In this Form Can View Service Call Report by Entering Valid Serial No.

Request.

6.1. New Product Requisition.

In this Form Dealer can Enter Value for New Product.

The screenshot shows a web form titled "Dealer New Product Requisition". It contains several input fields and dropdown menus. The "Document No" field is filled with "MMT0410001017". The "Ref. Product" section includes a "Product" dropdown menu with "Not Available" selected, a "Search" button, and an "Item Code" dropdown menu. Below this are fields for "Application", "Product Description", and "Comment". The "Competitor Name" dropdown menu is set to "Groundfos". There are also fields for "Competitor Dealer Price" and "Expected Dealer Price". A section titled "Expected Sales Information" includes three input fields for "Year 1 Qty.", "Year 2 Qty.", and "Year 3 Qty.". At the bottom of the form are "Save" and "Cancel" buttons.

6.2. Advertisement Product.

In this Form Dealer Can View Advertisements Product. And can also place order for selected item. By clicking on Next Button

The screenshot shows a web form titled "See advertising samples for look and feel.". It features a "Dealer Code/ Name" input field with a "Search" button. Below this are dropdown menus for "Dealer Code" (containing "AHD/A0030002"), "Dealer" (containing "AL-AMIN STEEL TRADERS.AHMEDABAD"), and "Adv. Material Type" (containing "ADVERTISEMENT"). A "View" button is positioned below the dropdown menus. A vertical scrollbar is visible on the right side of the form.



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See advertising samples for look and feel.

Dealer Code/ Name **Search**

Dealer Code Dealer
Adv. Material Type

View

Large Image	ProductCode	Product Name	Qty	Price	Select
View 	PCXABANBEN01	BANNER -BENGALI	<input type="text" value="10"/>	0.00	<input checked="" type="checkbox"/>
View 	PCXABANTAM01	BANNER -TAMIL	<input type="text"/>	0.00	<input type="checkbox"/>

Next

6.3. Stock dilution.

In this form dealer can request for non-moving stock after Entering required information send for approval by clicking on save button.

Dealer's Non-Moving Stock Dilution - Request

Dealer Code Dealer

Serial No. **View**

Item Code 1.5HP 50D CSS-9 1PH H.OPEN WELL (SS) (4m)

Place
Country Region/State
District City
Area

Purchase Price
Present List Price
Date of Purchase
Special Price offered by Dealer (Rs.)

Nature Of Goods

Packing Condition
Packing Type
Warranty Condition

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offered by Dealer _____
(Rs.) _____

Nature Of Goods

Packing Condition

Packing Type

Winding Condition

Painting Condition

Contact Information

Dealer Address

Phone No

Mobile No

E-Mail Id

....

Save **Cancel**

	DocNo	Dealer Code	Item Code	Serial No
Edit	1017	AHDA0030002	SC01ALBEID071101A1	C8054267

6.4. Display Show Room materials.

This Form Used to Request Show Room materials Created (Ref 1.16 Show Room Materials Master.) .By Entering Specified value person can request for show room materials.

Showroom Materials Master

Code Name

Nature Of Material

Description


Size

Colour Code

Approximate Price

Rs

Active



	Code	Name	Qty	Request	Remark
View <input type="checkbox"/>	2	Green Plastic with white coat.	<input type="text" value="0.000"/>	<input type="checkbox"/>	<input type="text"/>
View <input type="checkbox"/>	CDM001	de	<input type="text" value="0.000"/>	<input type="checkbox"/>	<input type="text"/>

Save **Cancel**

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6.5. Dealer Promotional Activity Request.

This form is used to Request Promotional Activity Done by Dealer.

Dealer Promotional Activity Request

Dealer Code: AHDA0030002 Dealer: AL-AMIN STEEL TRADERS-AHMEDABAD

Advertisement / Promotional Activity: Advertisement Type of Activity: Wall painting

Add **View**

Activity Group	Activity Grp Desc.	Activity Type	Activity Desc.	Purpose	Place of Activity	Size/Qty/No.s	Budget	Plan Date	Conn	
Delete	0076	Advertisement	AD0076	Wall painting	Selling CRI Pumps	Mumbai	20 qty	20000	20-March-2008	<input type="checkbox"/>

Save **Cancel**

Approval.

7.1. Purchase Order Approval.

In this form is used for Branch Executives can Approve/Reject Purchase order raised from dealer by selecting dealer and clicking on view button's can search individual dealer by clicking on Search Dealer Option. PO details displays based on the selection of Option Button like MPO, NPO, APO (Ref.2.4 Non Plan Order. NPO created by Dealer.)

After these records goes for next level of Approvals based on the Approval Level assigned by Admin in Functional Approval Settings.

Purchase Order Approval

Search Dealers

Dealer Code: Dealer:

From Date: To Date:

View

MPO
 NPO
 APO

Doc Type	Doc No.	Doc. Date	Reject
Detail	NPO	90004	4/24/2008 11:25:53 AM <input type="checkbox"/>
Detail	NPO	90005	4/24/2008 11:39:40 AM <input type="checkbox"/>

....

Purchase Order Approval Details

Sr No	Product	Item	Req. Qty	App. Qty	Price	Total	Remarks
10	4" SUB.PUMP SET(UPTO 2HP)	0.75HP 10ST SR1000 32D 1P 4" WOM	100	<input type="text" value="100.000"/>	0.000	0.00	<input type="text"/>
Total			100			0.00	

Save
Cancel

7.2. Purchase Return Order Request.

In this form is used to Branch Executive can Approve/Reject Purchase order Return Request from dealer, by selecting dealer and clicking on view button.

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The screenshot shows a web application interface for 'Purchase Return Order Request Approval'. The form includes a checkbox for 'Selected Dealers', a 'Dealer Code' dropdown menu with the value 'AHDA0030002', a 'Dealer' dropdown menu with the value 'AL-AMIN STEEL TRADERS.AHMEDABAD', a 'From Date' field with the value '21-May-2007', and a 'To Date' field with the value '21-May-2008'. A red 'View' button is positioned below the date fields. Below the form, there is a section titled 'Purchase Return Request Details' with two red buttons: 'Save' and 'Cancel'.

7.3. DDP Approval.

Branch Executive can Approve/Reject DDP by selecting dealer and clicking on view button.

7.4. Service Claim Request Approval.

Branch Executive can Approve/Reject Service Claim Request by selecting dealer and clicking on Pending button.

7.5. Stock Dilution Approvals.

This Form is used to approve stock dilution Request.