

# Olila Sales Force App User Manual

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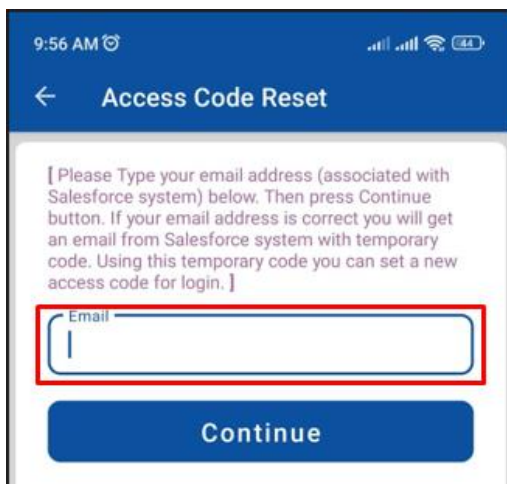
## User Login:

1. Users can log into the app by providing an email address and access code.
2. To get a temporary password and login for the first time, user has to click “Access Code Reset”.



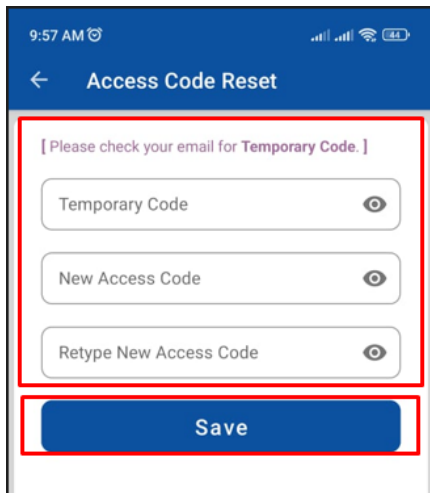
The screenshot shows the OLiLA Glassware login interface. At the top, the status bar displays the time as 9:56 AM and battery level at 84%. The app's logo, featuring a colorful circular graphic and the text "OLiLA Glassware", is centered. Below the logo, the text "( Salesforce )" is displayed. There are two input fields: "Email" with the value "anayet@olila.com" and "Access Code" with a toggle icon. A blue "Login" button is positioned below the fields. At the bottom, a red box highlights the "Access Code Reset" link.

3. After clicking “Access Code Reset”, a new page will appear. User will have to provide an email address and press “Continue”.



The screenshot shows the "Access Code Reset" screen. The status bar at the top shows 9:56 AM and 84% battery. A blue header bar contains a back arrow and the title "Access Code Reset". Below the header, a text block explains the process: "[ Please Type your email address (associated with Salesforce system) below. Then press Continue button. If your email address is correct you will get an email from Salesforce system with temporary code. Using this temporary code you can set a new access code for login. ]". A red box highlights the "Email" input field, which is currently empty. Below the input field is a blue "Continue" button.

4. If the email address is correct, an email with temporary access code will be sent from the system to the previous email address.
5. After pressing “Continue”, user will have to provide the temporary code in order to set a password of his choice. After setting the new access code, press “Save”. User can also press the “Eye” button to see the code.



9:57 AM

← Access Code Reset

[ Please check your email for Temporary Code. ]

Temporary Code

New Access Code

Retype New Access Code

Save

6. After the new access code is set, user can now go to the login page and provide login credentials. After pressing “Login”, if the credentials are correct, user can see his dashboard page.



9:56 AM

**OLiLA**  
Glassware

( Salesforce )

Email  
anayet@olila.com

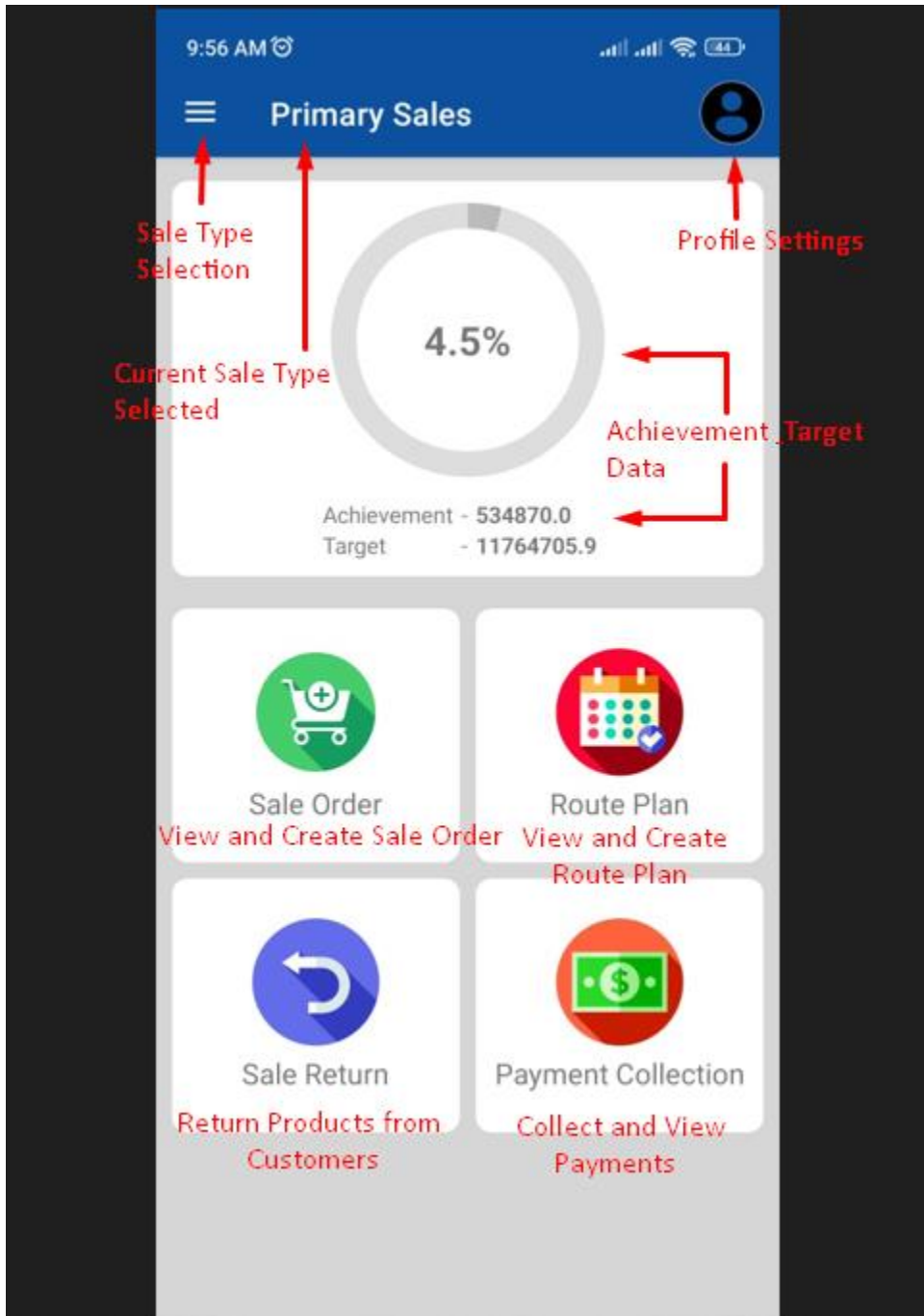
Access Code

Login

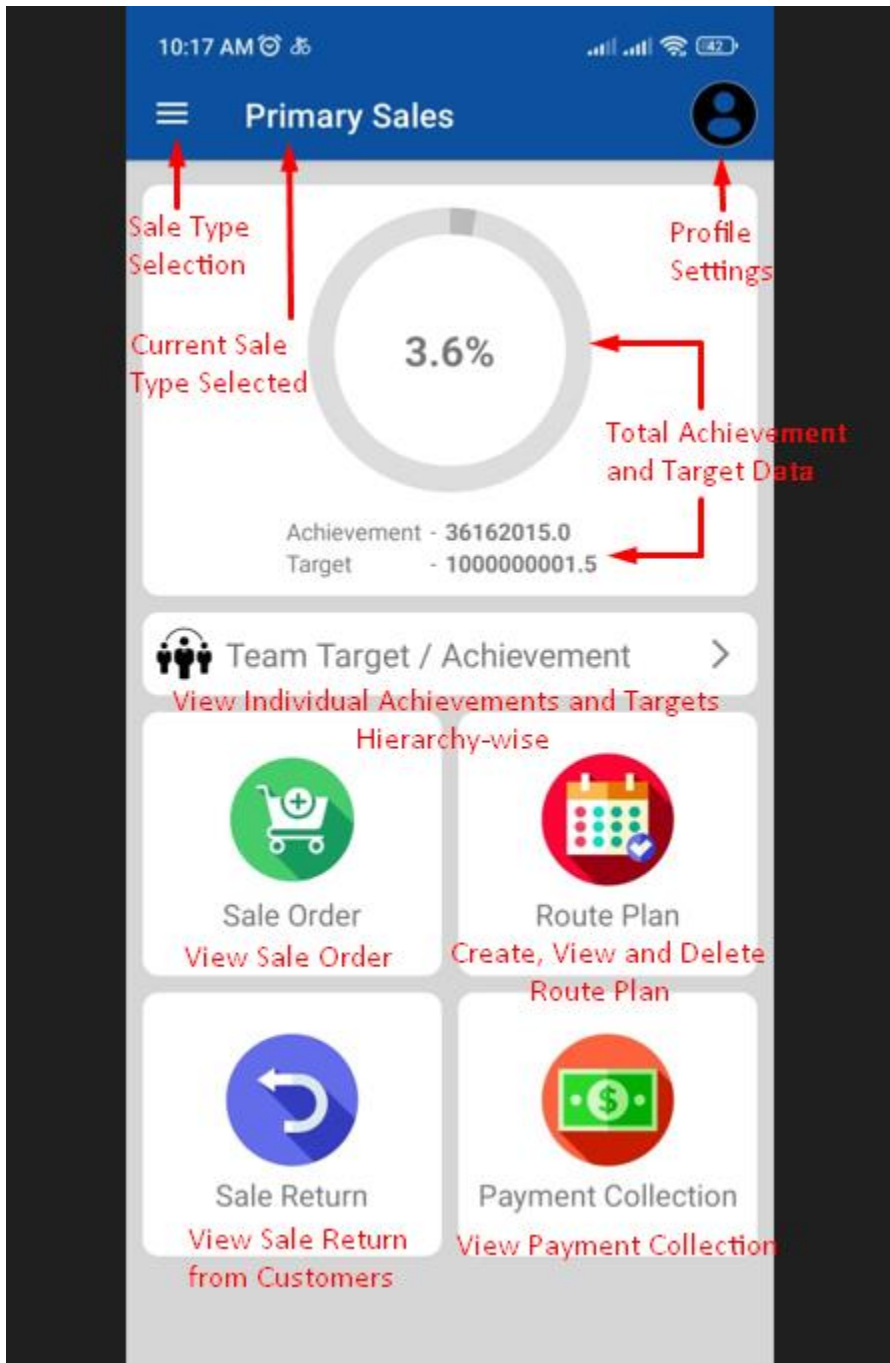
[Access Code Reset](#)

## Dashboard View:

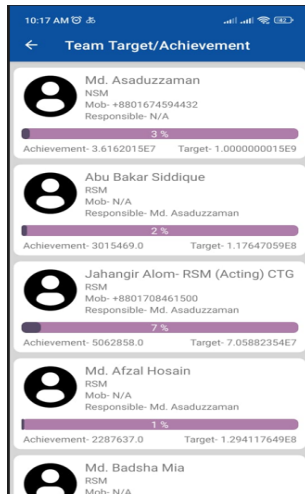
1. Below here is the dashboard view of Sales Officers.



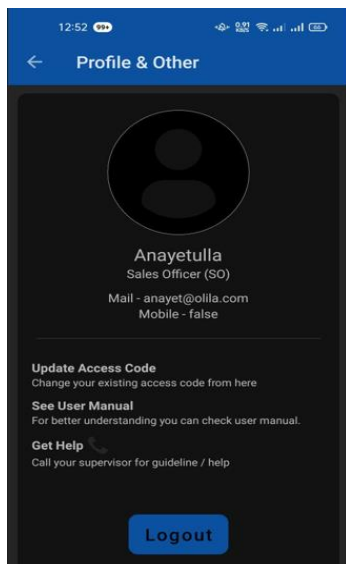
2. Here is the dashboard view of TSO, ASM, RSM and NSM.



3. Both views are identical except the “Team Target/ Achievement” feature in the latter view. As all salespersons other than Sales Officers have people under their command, they should be able to see the targets and achievements of those people also. Above this feature, his personal achievement and target is shown. But if he clicks on “Team Target/ Achievement”, he will be able to see all targets and achievements of all salespersons under his command.



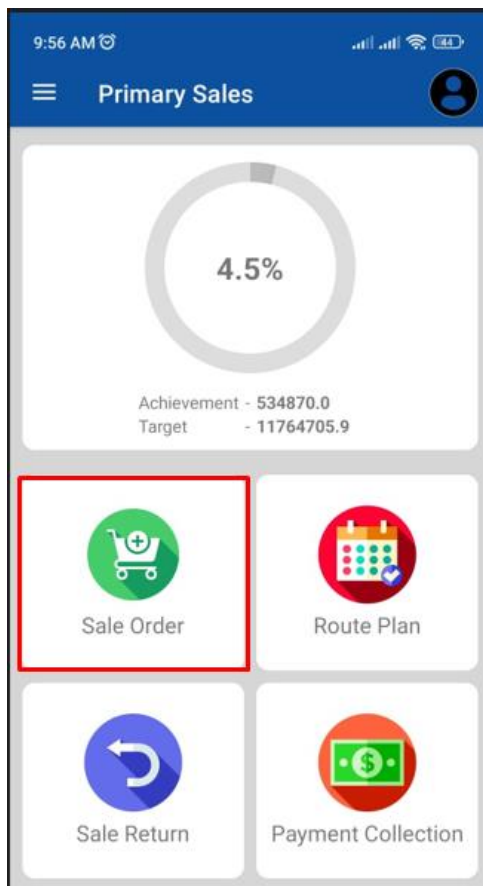
4. There are 3 horizontal bars in the top-left corner of the dashboard view. User can switch between Primary and Secondary Sales through here.
5. On the top-right corner, user can click on the profile icon to access his profile, update access code, view manual and call immediate boss.



6. At the top, user can view his personal achievement and target, with percentage.
7. There are 4 buttons at the bottom:
  - a. Sale Order: Sales Officers can create and view Sales Orders, while others can just view them.
  - b. Route Plan: Sales Officers can only create and view route plans assigned to them. Others can assign route plans to salespersons under their command.
  - c. Sales Return: Sales Officers can create Sales Returns, to take back products from customers as well as view them while others can just view them.
  - d. Payment Collection: Sales Officers collect payments through this feature. They can also view collection history. It is view only for other users.

### **Sales Order Creation & View:**

1. To create a sale order, go to “Sale Order” from Dashboard view



## 2. Tap “Create”

9:57 AM

← Sale Orders CREATE

2022-07-28 — 2022-08-28 >

|  |          |
|--|----------|
| <b>S13209</b><br>Customer - Maa Crockerries & Furniture<br>Responsible - Anayetulla<br>Date - 2022-08-27 10:16:21  | 56681.8  |
| <b>S13207</b><br>Customer - Maa Crockerries & Furniture<br>Responsible - Anayetulla<br>Date - 2022-08-27 10:21:36  | 33221.8  |
| <b>S13206</b><br>Customer - Maa Crockerries & Furniture<br>Responsible - Anayetulla<br>Date - 2022-08-20 07:24:45  | 46920.0  |
| <b>S13203</b><br>Customer - Bismillah Crockerries & Gift<br>Responsible - Anayetulla<br>Date - 2022-08-13 06:14:44 | 424020.0 |

3. On the top box, type either a customer code or name. Valid customer list will appear in the dropdown. Select the desired customer from the list. After selection, all the details of the customer will be filled up automatically. Also, the date of order will be automatically captured.

9:57 AM

← Create Sale Order Save

12466 - Maa Crockerries & Furniture

Customer Name  
Maa Crockerries & Furniture  
Customer Address  
Poshchim Bazar, Laksam, Comilla  
Contact  
01823436111  
Zone  
Comilla  
Secondary Contact Person  
N/A  
Delivery Address  
Poshchim Bazar, Laksam, Comilla  
Balance  
BDT 32720.0  
To Be Delivered From  
Factory Depot  
SO Date  
2022-08-28

| Products | Quantity | Price |
|----------|----------|-------|
|----------|----------|-------|

Total Amount - 0  
Discount Amount - 0

Add Item

9:57 AM

← Create Sale Order Save

12466 - Maa Crockerries & Furniture

Customer Name  
Maa Crockerries & Furniture  
Customer Address  
Poshchim Bazar, Laksam, Comilla  
Contact  
01823436111  
Zone  
Comilla  
Secondary Contact Person  
N/A  
Delivery Address  
Poshchim Bazar, Laksam, Comilla  
Balance  
BDT 32720.0  
To Be Delivered From  
Factory Depot  
SO Date  
2022-08-28

| Products | Quantity | Price |
|----------|----------|-------|
|----------|----------|-------|

Total Amount - 0  
Discount Amount - 0

Add Item



4. Tap on “Add Item” to add products.

9:57 AM

← Create Sale Order Save

12466 - Maa Crockeries & Furniture

Customer Name  
Maa Crockeries & Furniture

Customer Address  
Poshchim Bazar, Laksam, Comilla

Contact  
01823436111

Zone  
Comilla

Secondary Contact Person  
N/A

Delivery Address  
Poshchim Bazar, Laksam, Comilla

Balance  
BDT 32720.0

To Be Delivered From  
Factory Depot

SO Date  
2022-08-28

| Products | Quantity | Price |
|----------|----------|-------|
|----------|----------|-------|

Total Amount - 0  
Discount Amount - 0

Add Item

5. A wizard will appear. On the top-most field search products by either typing a product code or product name. A list of valid products will appear according to the searching. Select the desired one from the list. As soon as a product is selected, the system will show the complete product name, available quantity of the corresponding product and unit price. The discount amount will be automatically fetched. After giving product quantity, “Total Price” will be calculated automatically. Click “Add” to add the product.

9:58 AM

← Create Sale Order Save

12466 - Maa Crockeries & Furniture

Customer Name  
Maa Crockeries & Furniture

Customer Address  
Poshchim Bazar, Laksam, Comilla

Contact  
01823436111

Zone  
Comilla

Secondary Contact Person  
N/A

Delivery Address  
Poshchim Bazar, Laksam, Comilla

Balance  
BDT 32720.0

To Be Delivered From  
Factory Depot

SO Date  
2022-08-28

Master Carton 48pcs (6pcs Normal Inner)

Product Name  
Tea Cup - Master Carton 48pcs (6pcs Normal Inner)

Available Quantity  
68.0

Type Quantity

| Unit Price | Discount | Total Price |
|------------|----------|-------------|
| 3322.18000 | 0.0%     | 0.0         |

Cancel Add

Add Item

6. After adding products, “Total Amount” and “Discount Amount” will be updated automatically. When all is finalized, tap “Save”.

9:58 AM

← Create Sale Order Save

12466 - Maa Crockerries & Furniture

Customer Name  
Maa Crockerries & Furniture

Customer Address  
Poshchim Bazar, Laksam, Comilla

Contact  
01823436111

Zone  
Comilla

Secondary Contact Person  
N/A

Delivery Address  
Poshchim Bazar, Laksam, Comilla

Balance  
BDT 32720.0

To Be Delivered From  
Factory Depot

SO Date  
2022-08-28

| Products  | Quantity | Price   |
|---|----------|---------|
| 1.[E004]Tea Cup - Master Carton 48pcs (6pcs Normal Inner) | 5        | 16610.9 |

Total Amount - 16610.9  
Discount Amount - 0.0

Add Item

7. To confirm the order and submit for approval to higher authority, tap “Confirm”. Please note that before tapping “Confirm”, payment collection processes have to be completed.

12:10

← S13210 Confirm

Customer Name  
Maa Crockerries & Furniture

Customer Address  
Poshchim Bazar, Laksam, Comilla

Contact  
01823436111

Zone  
Comilla

Secondary Contact Person  
N/A

Delivery Address  
Poshchim Bazar, Laksam, Comilla

To Be Delivered From  
Factory Depot

SO Date  
2022-08-28 03:58:40

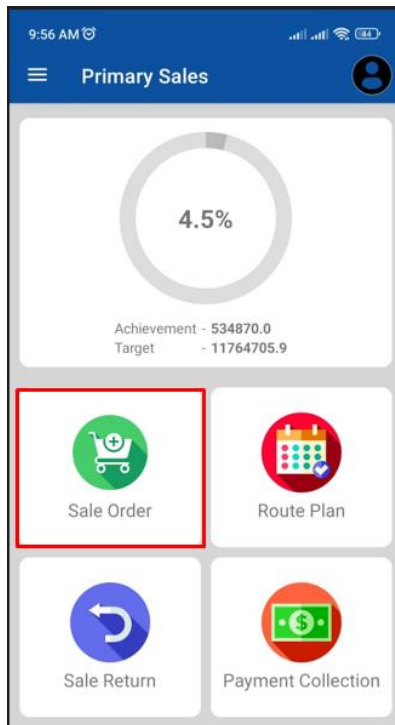
Responsible  
Anayetulla

| Products  | Quantity | Price    |
|---|----------|----------|
| 1.[E004]Tea Cup - Master Carton 48pcs (6pcs Normal Inner) | 5        | 14444.26 |

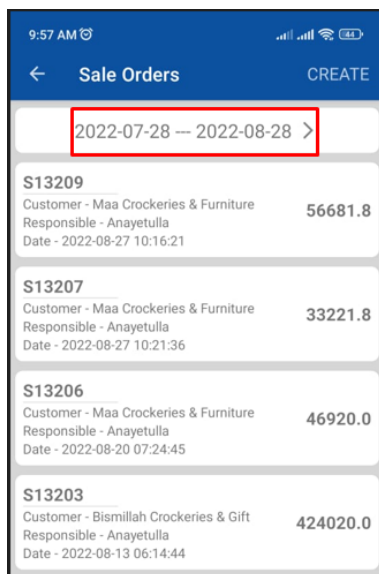
Total Amount - 16610.9  
Discount Amount - 0.0

Delete

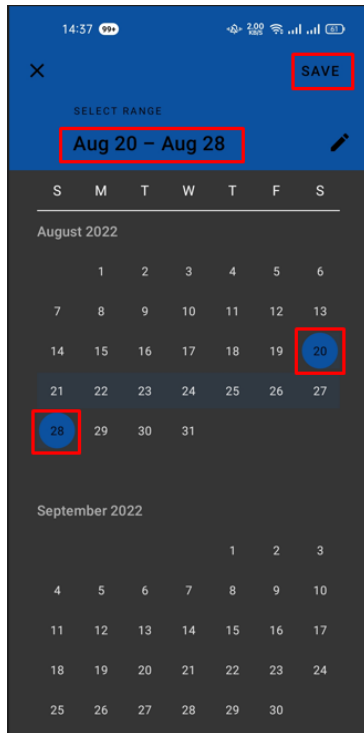
8. To view sale orders, click on “Sale Order”.



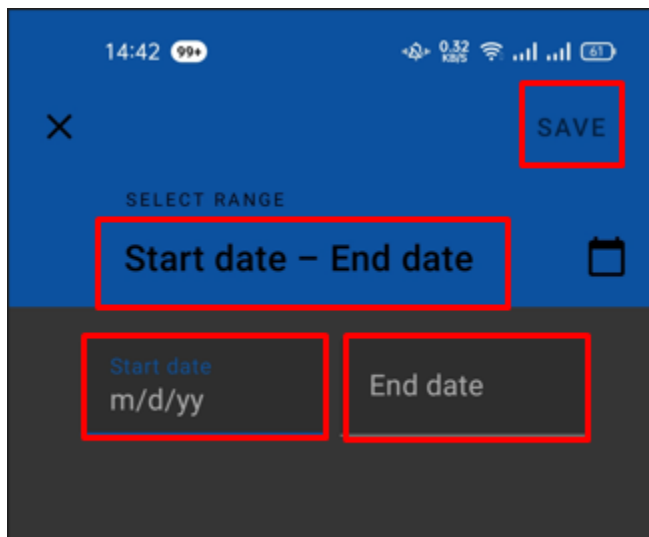
9. Here is the list of all sales orders of the user and salespersons under the user in the given time period. The time period is given at the top of the list. By default this time period is set to last month. But user can customize the time period.



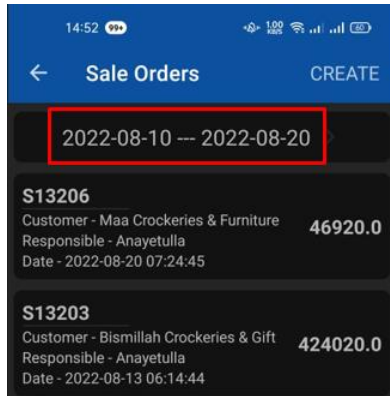
10. To change the time period, tap on it. Then tap on two dates in the calendar to set start date and end date respectively. The selected date will be displayed on top. Press “Save” to confirm.



11. Another method to select date is to click the “Pencil” icon. This will open a new page to give the dates manually. Please note that here the format is MM/DD/YYYY or M/D/YY. After giving valid range, the selected range will be displayed at top. Click “Save” to continue.

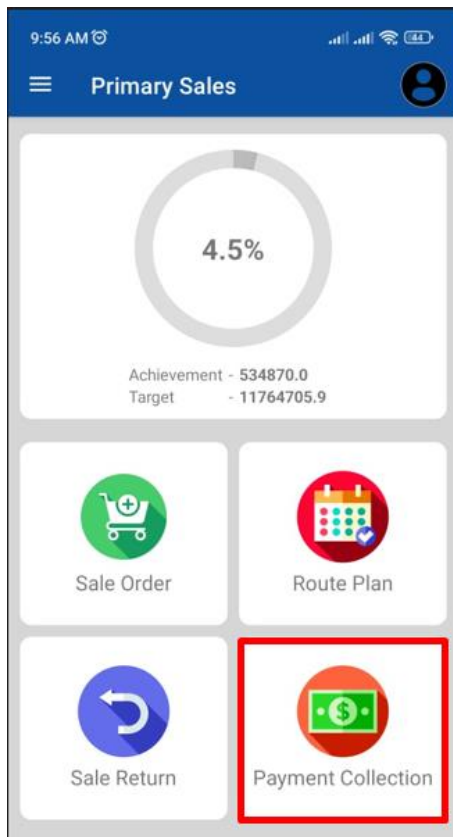


12. After confirming the time period, only sales orders of the selected time period can be viewed.

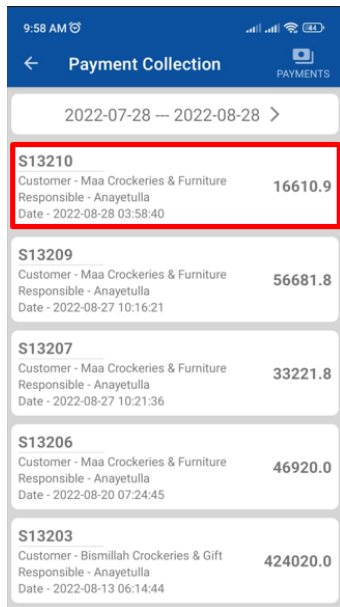


### Payment Collection Creation & View:

1. Go to “Payment Collection”



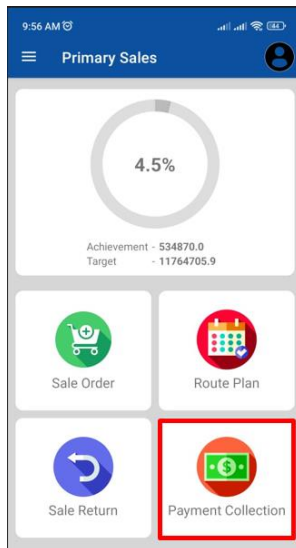
2. Tap on the sales order of which payment will be received.



3. All the details of the sales order will be forwarded automatically. Select a bank name in “Select Payment Method” from dropdown. Bank account number will come automatically. Give amount and branch name in the respective fields. Finally, select whether the payment is via cash or cheque. If all data is properly given, tap on “Submit”.

The screenshot shows the 'S13210' payment form. At the top, there's a header with a back arrow, the title 'S13210', and a 'SUBMIT' button highlighted with a red box. The form contains several fields: 'SO Amount' (16610.9), 'Customer Code' (OLILA/12466), 'Customer Name' (Maa Crockeries & Furniture), 'Customer Address' (Poshchim Bazar, Laksam, Comilla), 'Customer Balance' (BDT 32720.0), and 'Payment Date' (2022-08-28). Below these are four dropdown menus: 'Select Payment Method' (Pubali Bank Limited-8796), 'Select Bank Account' (0565901028796), 'Amount' (16700), and 'Branch Name' (Comilla). At the bottom, there are two radio buttons: 'Cash' (selected) and 'Cheque'. A red box highlights the 'SUBMIT' button at the top right.

4. A pop-up will come for confirmation. Tap “Ok” to proceed. Another pop-up will come to notify that it has been submitted successfully. Tap “Ok” again.
5. To view payments, go to “Payment Collection”



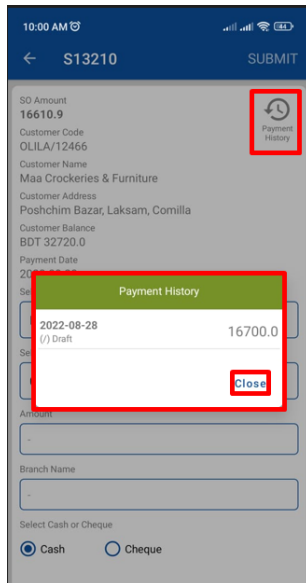
6. Here are all the payments sales order wise that have not been approved or cancelled yet. Tap on one to see details. The time period can be customized as Sales Order. See steps 10 to 12 of “**Sales Order Creation & View**” to know the process.

Payment Collection

2022-07-28 -- 2022-08-28 >

|  |                 |
|--|-----------------|
| <b>S13210</b><br>Customer - Maa Crockerries & Furniture<br>Responsible - Anayetulla<br>Date - 2022-08-28 03:58:40  | <b>16610.9</b>  |
| <b>S13209</b><br>Customer - Maa Crockerries & Furniture<br>Responsible - Anayetulla<br>Date - 2022-08-27 10:16:21  | <b>56681.8</b>  |
| <b>S13207</b><br>Customer - Maa Crockerries & Furniture<br>Responsible - Anayetulla<br>Date - 2022-08-27 10:21:36  | <b>33221.8</b>  |
| <b>S13206</b><br>Customer - Maa Crockerries & Furniture<br>Responsible - Anayetulla<br>Date - 2022-08-20 07:24:45  | <b>46920.0</b>  |
| <b>S13203</b><br>Customer - Bismillah Crockerries & Gift<br>Responsible - Anayetulla<br>Date - 2022-08-13 06:14:44 | <b>424020.0</b> |

7. Again, the payment collection page of step 3 will open. On the top-right side, there is an icon named “Payment History”. Tap it. All the payments with date and status regarding this sales order will be shown. Tap “Close”.



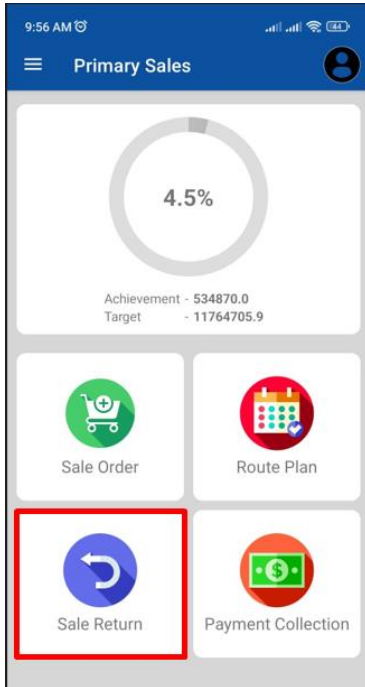
8. In the list view page, there is another icon name “Payments” on the top-right corner. Tapping it will show all payments taken within the time period as well as their details. Here also the time period can be customized.



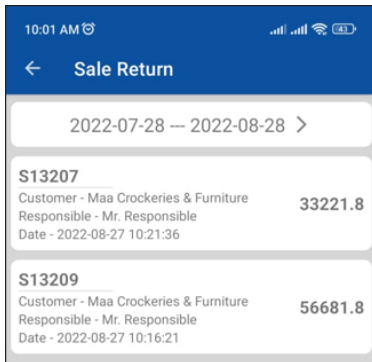


## Sales Return Creation & View:

1. Go to “Sales Return”



2. Click on the sale order of which products will be returned.



3. A new page will appear containing the list of products that has been delivered. Delivered quantities of individual products are also shown.

10:01 AM

S13207 RETURN

Customer Name  
Maa Crockerries & Furniture

Customer Code  
OLILA/12466

Delivery No.  
FACWH/OUT/07590

| Products  | Delivered | Return |
|---|-----------|--------|
| <input type="checkbox"/> 1. Tea Cup - Master Carton 48pcs (6pcs Normal Inner) | 10.0      | 0.0    |

- Select a product from the list that needs to be returned. A wizard will come to take input returning quantity. Give the necessary quantity and tap “Add”. Note that the returning quantity cannot be greater than delivered quantity.

10:02 AM

S13207 RETURN

Customer Name  
Maa Crockerries & Furniture

Customer Code  
OLILA/12466

Delivery No.  
FACWH/OUT/07590

| Products  | Delivered | Return |
|---|-----------|--------|
| <input checked="" type="checkbox"/> Tea Cup - Master Carton 48pcs (6pcs Normal Inner) | 10.0      |        |

Product Name  
Tea Cup - Master Carton 48pcs (6pcs Normal Inner)

Delivered Quantity  
10.0

Cancel Add

- If returning quantities of all the products have been given, tap on “Return”.

10:02 AM

S13207 RETURN

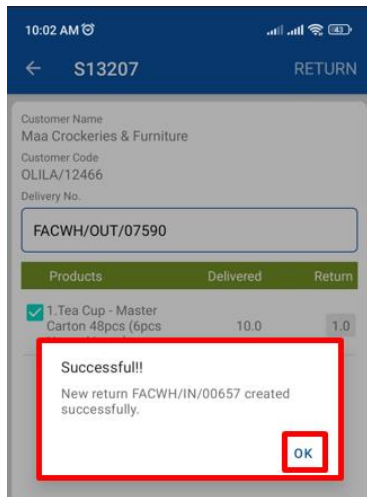
Customer Name  
Maa Crockerries & Furniture

Customer Code  
OLILA/12466

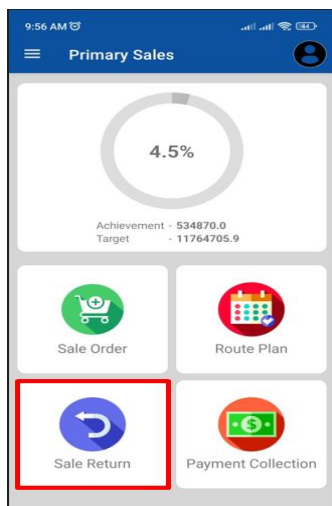
Delivery No.  
FACWH/OUT/07590

| Products   | Delivered | Return |
|--|-----------|--------|
| <input checked="" type="checkbox"/> 1. Tea Cup - Master Carton 48pcs (6pcs Normal Inner) | 10.0      | 1.0    |

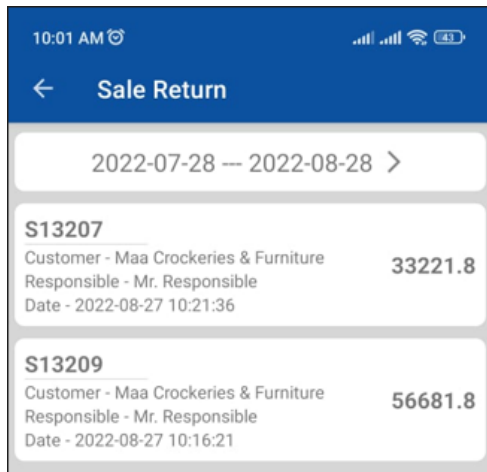
- A confirmation pop-up will come. Tap “Ok” to continue.



7. To view the sale returns, tap on “Sale Return”.

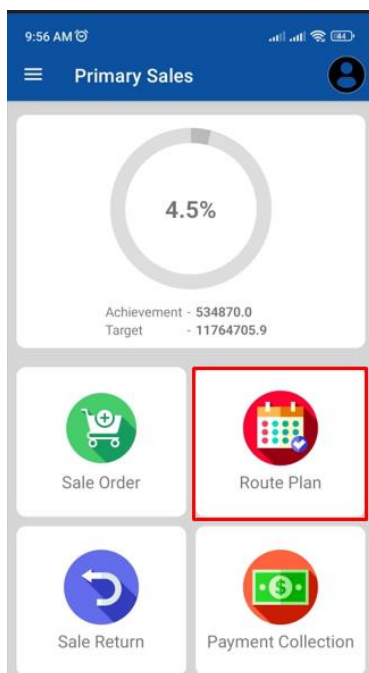


8. The list of all sale returns within the time period will be shown. As previous cases, this time period can be customized (See steps 10 to 12 of “**Sales Order Creation & View**” to customize).

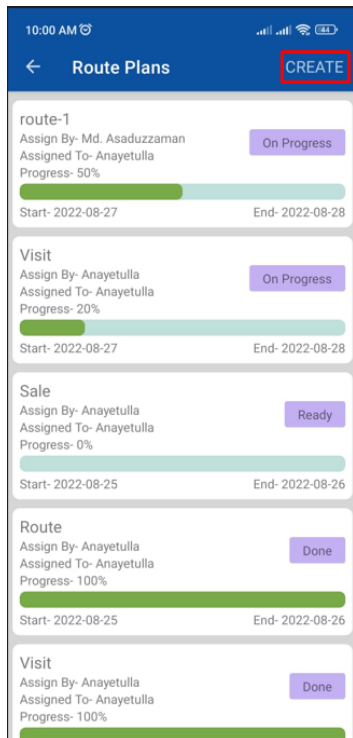


## Route Plan Creation & View:

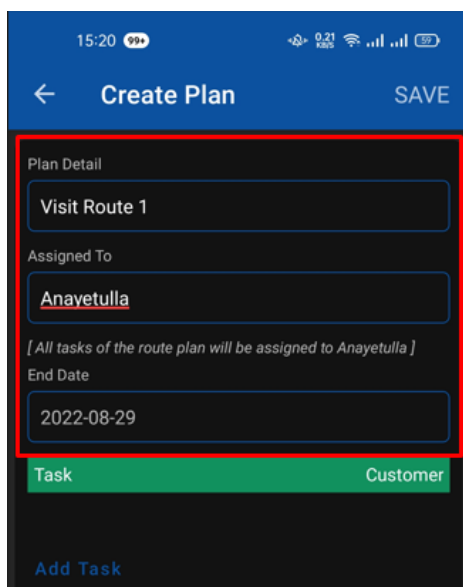
1. Click on “Route Plan”



2. Click on “Create”

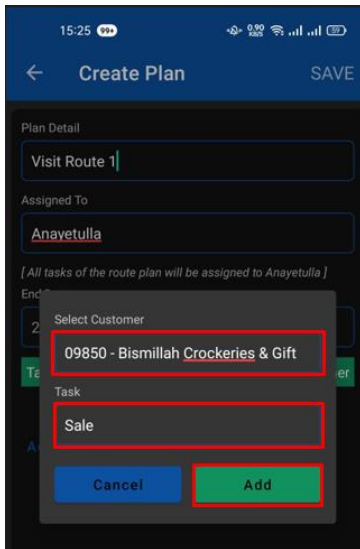


3. A page will appear. Here user will give a name in the first field. Next, the user may assign himself or another salesperson under him. This can be done by typing a name and select one from the dropdown. Then the user can tap on the field “End Date”. A calendar will appear. User can select a date by tapping or pressing the “Pencil” icon and type the date.

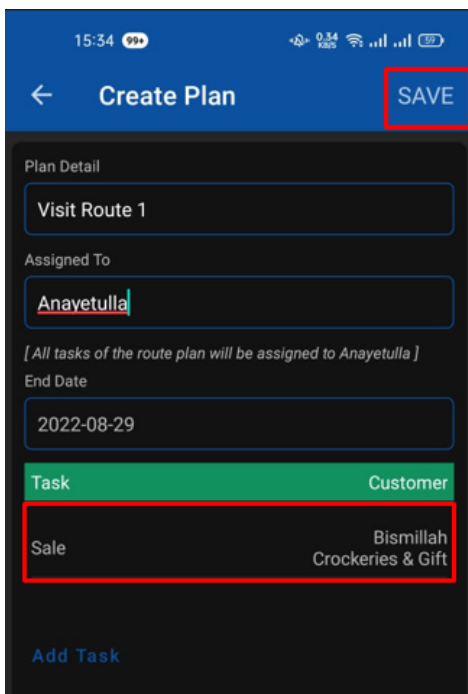


4. User can add task by tapping on “Add Task”. A wizard will appear. Here the user will have to provide the name of the customer. Again, this can be done

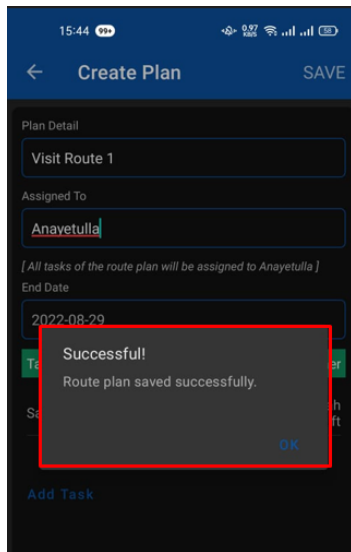
by typing code or name of the customer and selecting the desired one from dropdown. Then give a name or description in the “Task” field and tap “Add”.



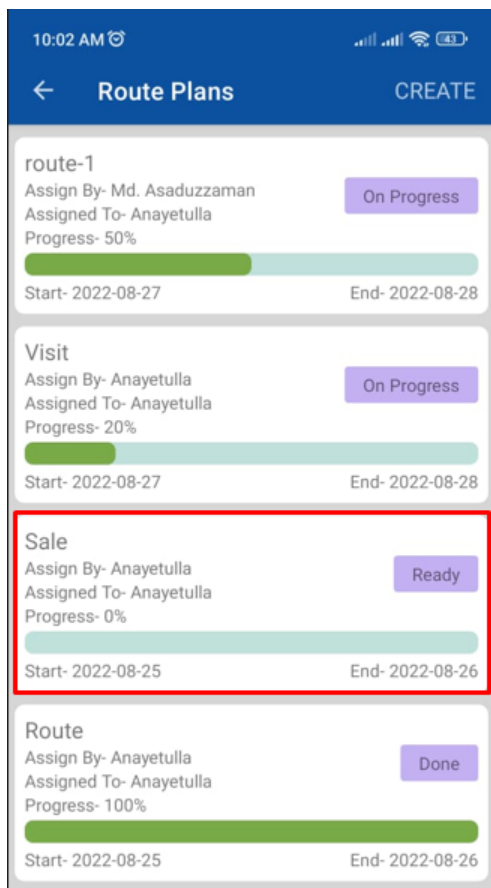
5. After tapping add, the task will be added in the list. Click on “Add Task” again to add more tasks. When all the tasks are added, click “Save”.



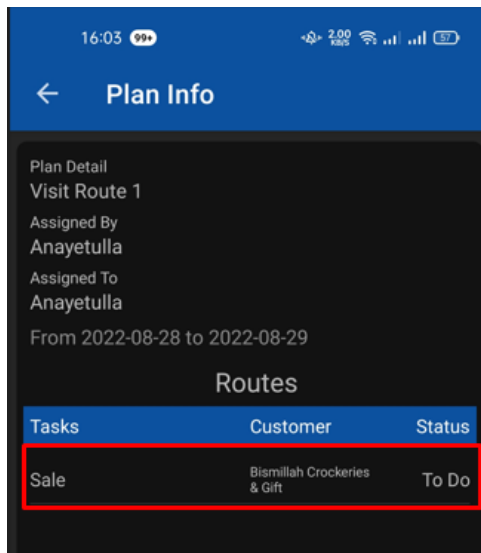
6. A pop-up will appear that the route plan has been created. Tap “Ok”



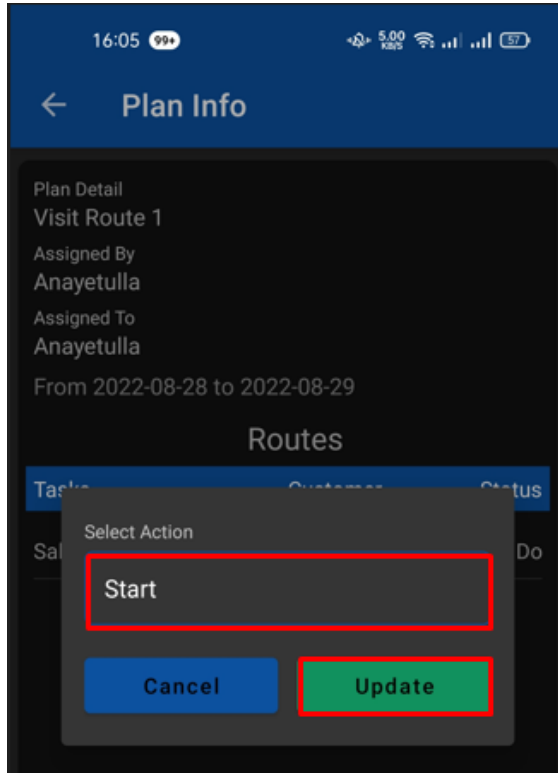
7. To progress through an assigned route plan, user have to click on the plan which is in “Ready” state.



8. This route plan may have one or multiple tasks. At first, all the tasks are in “To Do” state. Now, if a task requires the assigned person to be somewhere, the person must go there and click on the task line.

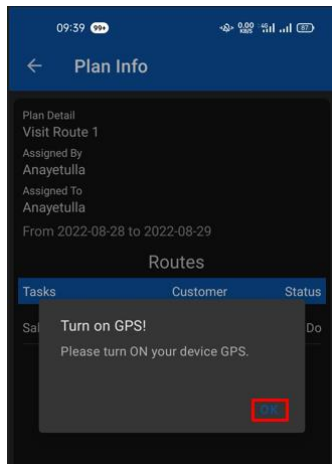


9. A wizard will appear stating the action “Start”. Click on “Update”.

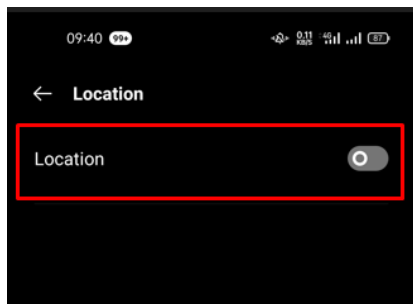




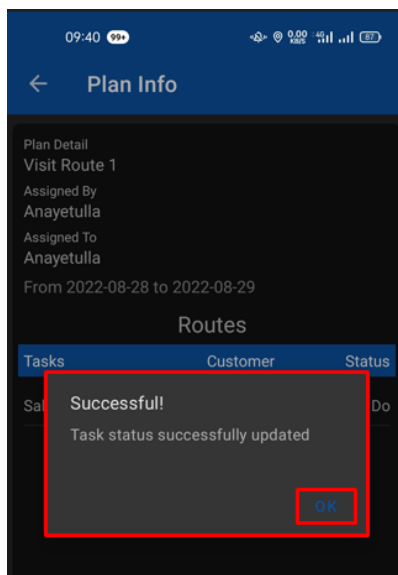
10. The app will prompt to turn on location if location service of the mobile is turned off. Tap “Ok” to continue.



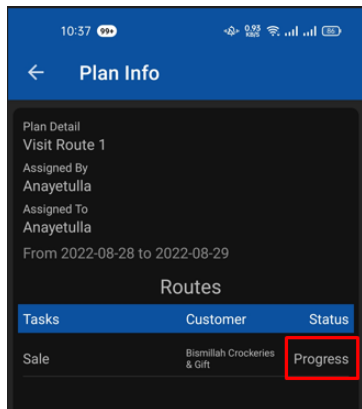
11. After tapping “Ok”, the app will redirect to the location service. Turn on the location and go back



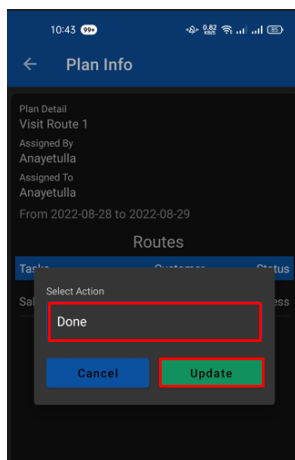
12. Now with GPS on, complete step 9. After tapping “Update”, a pop-up will come to notify that the task has been updated. Tap “Ok”.



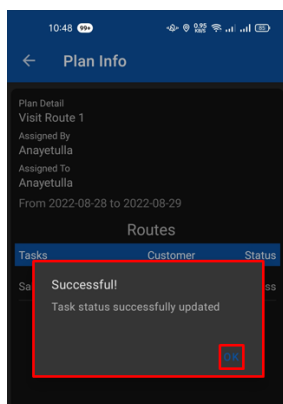
13. The status is changed to “Progress”. Now after the task is completed, again go to the route plan and tap on the task.



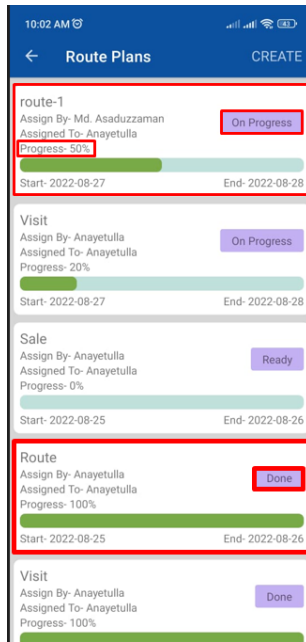
14. This time the actions are “Done” and “Incomplete”. If the task is finished, select “Done” (Which is selected by default) and tap “Update”.



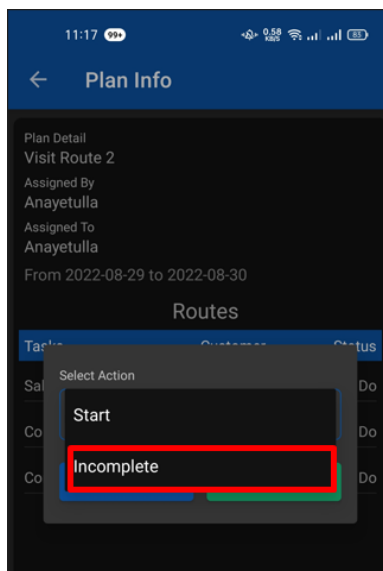
15. Again if the location service is turned off, the app will prompt to turn on it. Check steps 10 and 11 for this. Otherwise, a pop-up will come that the task status has been updated. Tap “Ok”



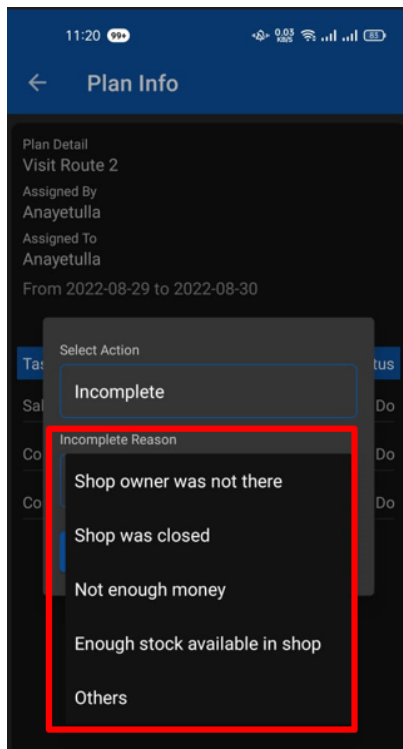
16. As this route plan had only 1 task, after completing the task, the status of the route plan will be “Done”. If a route plan has multiple tasks and some of them are completed, the status will be “On Progress” with percentage completion. So, if all of the tasks of a route plan are completed, only then the route plan status will be “Done”.



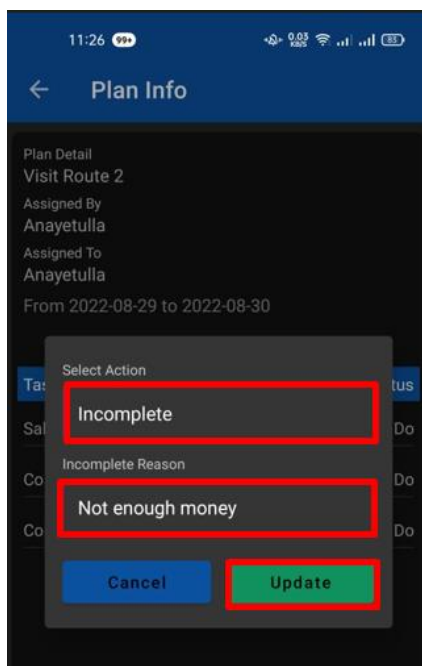
17. In every step of a task the user can select “Incomplete” if a task could not be performed.



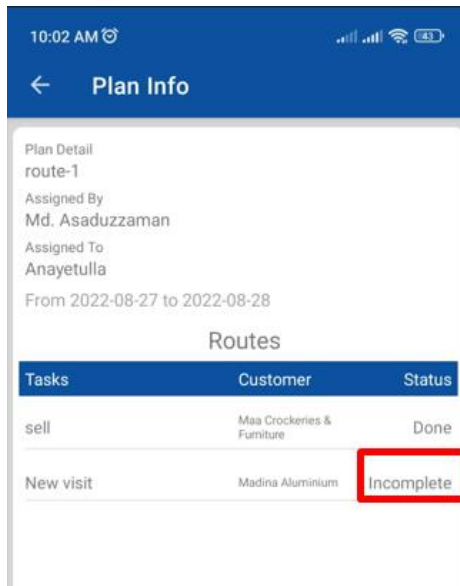
18. After selecting “Incomplete”, choose from different options from the dropdown to give a reason. If none of the first 4 reason fits, select “Others” and type the specific reason in “Remarks/Reason” field.



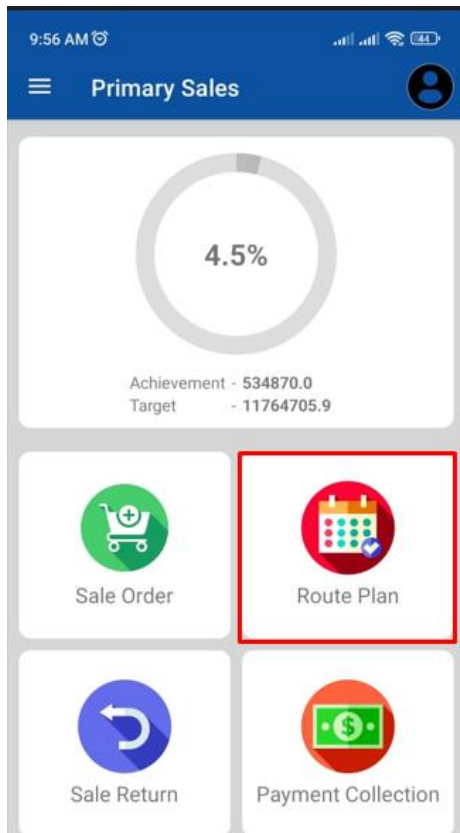
19. Now tap on “Update”.



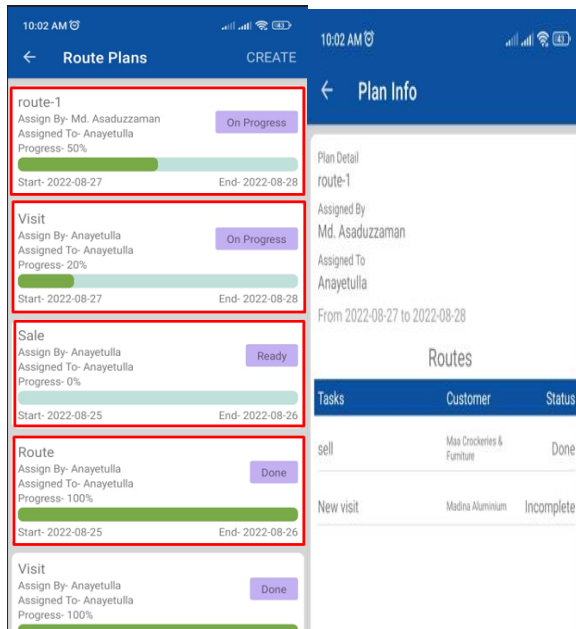
20. As previously stated, a pop-up will come to notify that the task status has been updated. Press “Ok”. The task status will be “Incomplete”.



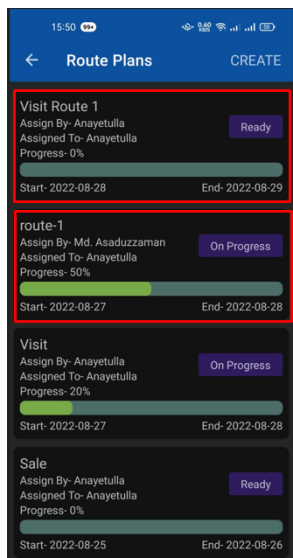
21. To view the route plans, click on “Route Plan”



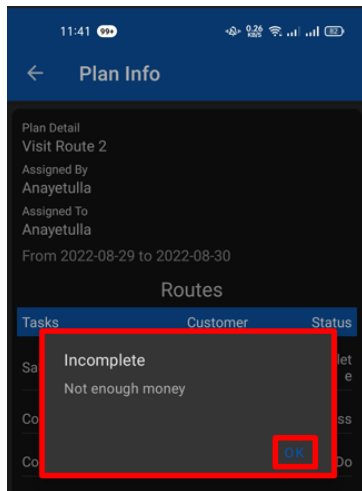
22. Here is the list of all route plans and their progresses of the user and salespersons under the user. General details are shown in the list view. User can tap to see details.



23. At first the route plan will be in “Ready” state and all the tasks will be in “To Do” state. When the assigned user completes any of the tasks (But not all) in the plan, the state changes to “On Progress”. If all the tasks of a route plan is completed, the state will be “Done”. The percentage completion progress can also be visible in each plan.



24. Some tasks may not be completed by the assigned person. He will mark them as “Incomplete” and give a reason for not doing the task. To view the reason, go to the specific route plan and tap on the task. Tap “Ok” after viewing is done.



25. Higher level salesperson is able to cancel a task of lower-level sales persons. He should leave a log note stating the reason.