Fareast Mercantile Co. Ltd - Nigeria

Forging partnerships built on trust and commitment

WebMerchandizer

User Manual

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Chapter 1

1.1. About this User Guide

This guide is indented for the business owners who want to track the management information system in the organization.

The following are explained in details:

- **Login to Merchandizer:** Helps you to login to WebMerchandizer application. For more information see *"Login to WebMerchandizer" on page 4*

- **Manage Masters:** Helps you to manage the master information of the data used in the application. For more information, see *"Manage Masters" on page 7*

- **Manage Transaction:** Helps you manage the perform the transaction in WebMerchandizer application. For more information, see *"Manage Transactions" on page 25*

- **Manage Reports:** Helps you to generate the report for the sale order, invoice, BDE list and collection report. For more information, see *"Manage Reports" on page 45*

- **Manage Settings:** Helps you to set the application, user, and tab set up. For more information see

- **Log out of Merchandizer:** Helps you to log out of the application**.** For more information, see *"Logout of WebMerchandizer" on page 78*

1.1.1. Definitions

The following is the list of the definition used in this document:

Terms	Definition
LGA	Local Government Authority
RSP	Retail Sale Price
SP	Sale Price

1.1.2. Audience

This guide is indented for the key stakeholders responsible in the organization to perform the following:

1.1.3. Documentation Conversion

Elements	Conversions
Italic	Indicates image caption and cross-reference
	Indicates processes to perform with care
Bold	Indicates graphical user interface elements associated with an action or terms defined in text or glossary.
Blue Text	Indicates Hyper link

1.1.4. Documentation Feedback

Documentation support is available through the Kaladi Consulting Services. If you are a customer with an active support contract, or covered under warranty, and need pre and post-sales technical support, you can access our online tools or mail us at support@kaladi.in.

Our address for contact is:	
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Chapter 2

2.1. WebMerchandizer

In WebMerchandizer application, the master data is fetched from ERP (Enterprise Resource Planning) application and displays the data on the mMerchandizer screen. The WebMerchandizer acts as a intermediate to collect the information from ERP and sent to mMerchandizer (Mobile Application). The WebMerchandizer application also receives the data from the mMerchandizer and sent it to ERP application.

The Merchandizers in Fareast Mercantile Co Ltd (FMCL) using mobile application has to update the work performance in the mMerchandizer application which is tracked and monitored by the top management through WebMerchandizer application.

The merchandizer responsibility is to plan and develop the merchandizer strategies and analyze the sales figure. The merchandizer also capture the customer's reactions and market trends to anticipate the product needs.

Chapter 3

3.1. Login to WebMerchandizer

In this section, you can understand how to access the WebMerchandizer application with your login credentials. You can login to the application portal using the given email ID and password. The application is restricted to a specific user who can access the application in the organization.

> User ID and password is unique for every user.

To login to the application, do the following:

1. Enter the application URL in the web browser. The WebMerchandizer login screen appears as shown in the image.
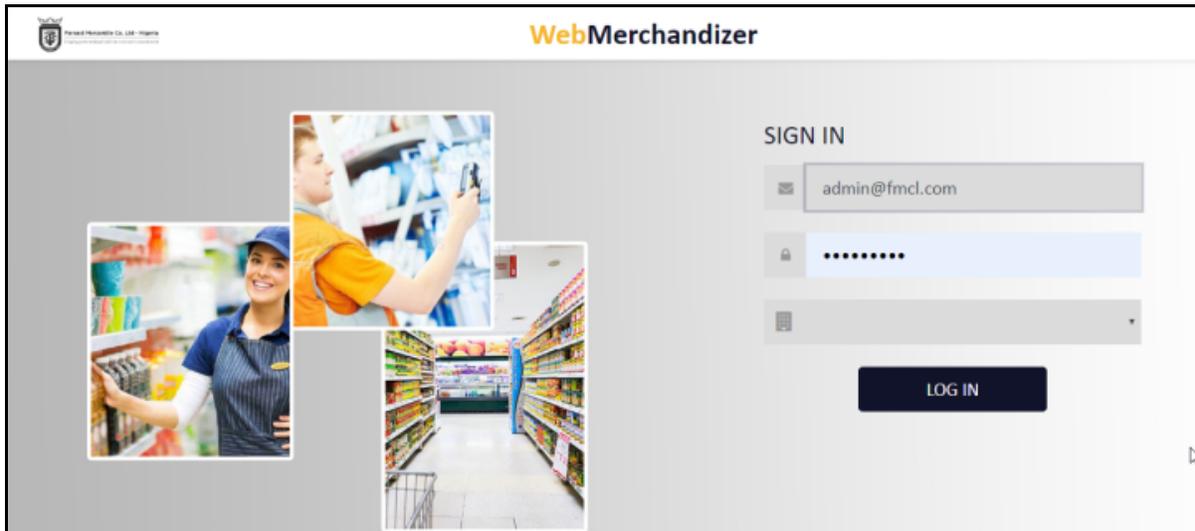
Figure 1: WebMerchandizer Login

1. Enter your Email ID which is registered as a user credentials in the **Email ID** text box.

> Based on the Email ID you enter, you can view the menu based on the rights and privileges for the user gets appended.

2. Enter the unique password linked with the Email ID in the **Password** test box.

3. Select the company name form the **Select Company** drop-down list.

> Based on the company name you select, the company logo and the application name gets updated. All the data related to the selected company gets appended in the application.

- If you try to login without selecting the company name. An error message appears as shown in the image.
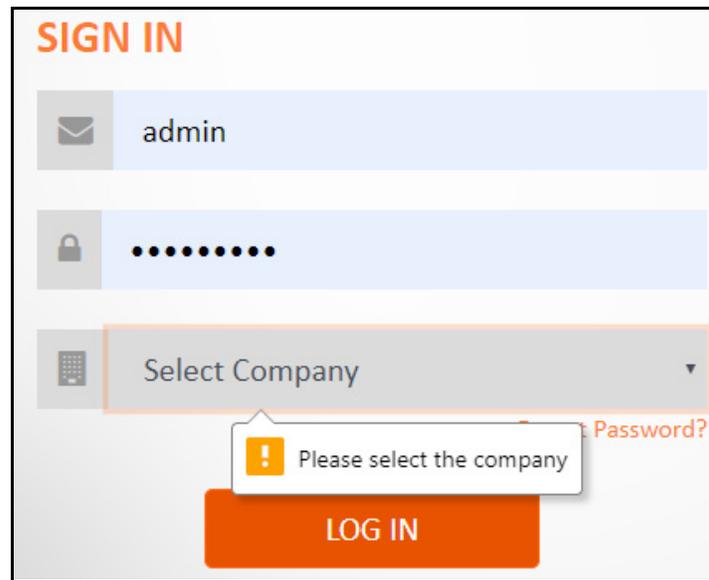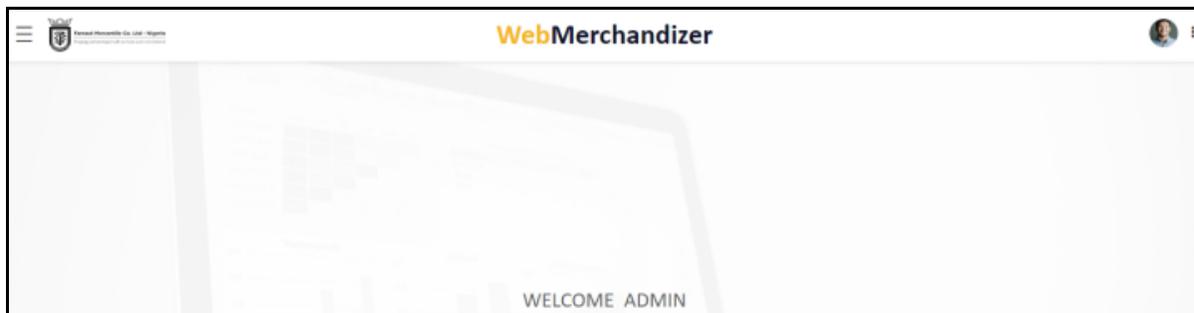

Figure 2: Error Message to Select the Company Name

4. Click **LOG IN**. The DASHBOARD appears as shown in the image.

- If the password or the Email ID you entered does not match. An alert message appears as shown in the image.
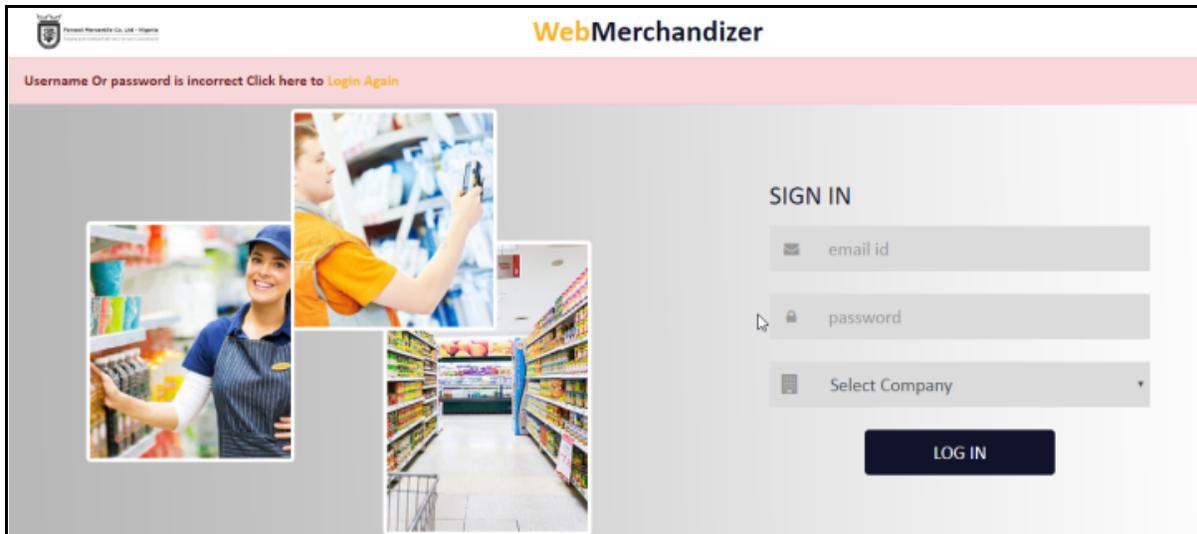
Figure 3: Incorrect User ID or Password

- Click **Login Again** and enter your correct credentials.

You have successfully logged in to the WebMerchandizer application.

Chapter 4

4.1. Manage Masters

The master data in WebMerchandizer is primarily used to perform administrative tasks where you can create and manage the master data received from the ERP. The application masters collect the data from ERP and send the data to mMerchandizer application for the merchandizer. The merchandizer can sync the master data to the tab and use the application with the required data.

The user with administrative privileges can manage the following masters in WebMerchandizer:

- **Product:** Helps you to manage the product details with the description and the product group. You can also capture the category details for the product. For more information see *"Working with Product Master" on page 7*.

- **Customer:** Helps you to manage the customer details with the payment terms. You can also add multiple shipping address for a customer. For more information see *"Working with Customer Master" on page 12*.

- **Price List:** Helps you to view the price list name with the set of products and defined price. You can set the effective start and end date for the price list. For more information see *"Working with Price List Master" on page 16*.

- **Customer Mapping:**

4.1.1. Working with Product Master

In this section, you can understand how to view the list of products available with the description of the product. You can also edit the product details and the application allows you to add the category details s for that particular product.

The following features are explained in details:

- *"View Product List" on page 8*

- *"Edit Product Details" on page 10*

4.1.1.1. View Product List

In this section, you can understand how to view the list of products and the product details.

To view the list of products, do the following:

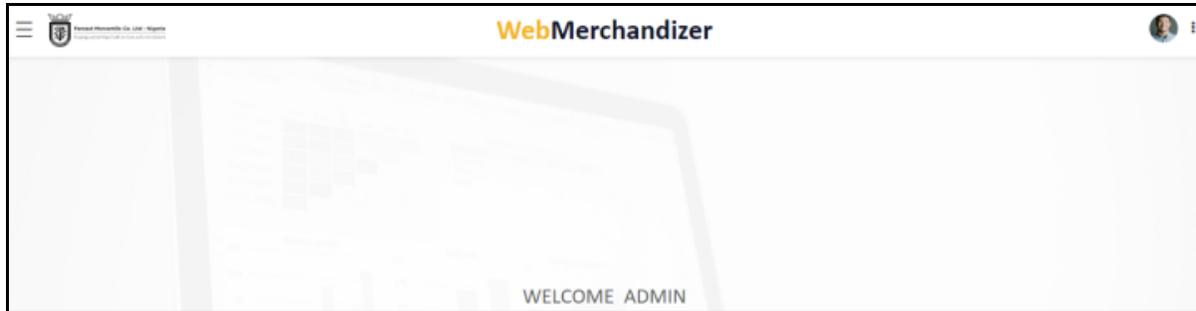1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.

Figure 1: WebMerchandizer Welcome

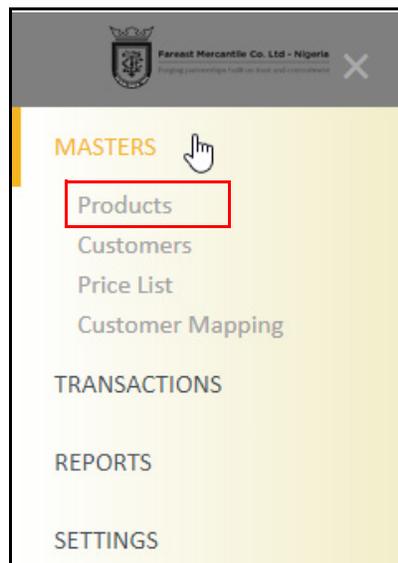2. On the screen, click [icon] icon. The menu appears as shown in the image.

Figure 2: WebMerchandizer Menu

3. Click **MASTERS > Products**. The PRODUCT DETAILS screen appears as shown in the image.

Figure 3: Product Details

Scroll right to view the hidden fields in the screen. The products details screen displays the product list based on the product code for the first 10 products. You can use the page navigation to view the next set of products, click **Next** or click the page number to view the next set of product. The page navigation is on the right down corner of the screen as highlighted.

4. On the screen, you can view the following:

- Show 10 entries : Click the drop-down arrow to set the number of products you want to display on the summary table.

- Search: : Enter the search parameter on the text box to display the search result on the summary table.

- **Edit**: Click icon to edit the product details and add category details.

- **Product Name**: Displays the product name.

- **Product Code**: Displays the unique code for the product.

- **Product Type**: Displays the type of the product.

- **Image**: Displays the product image name and image type.

    Displays only when the product image is attached in the product details.

- **Long Description**: Displays a long description about the product.

- **Batch**: Displays if the product is under batch control or not.

- **Division Code**: Displays an unique identification number for the product division.

- **Division**: Displays the division name for the product.

- **Principal Code**: Displays the unique identification number for the product principal.

- **Principal**: Displays the principal name for the product.

- **Brand Code**: Displays the unique identification number for the product brand.

- **Brand**: Displays the brand name for the product.

- **Category Code:** Displays the unique identification number for the product category.

- **Category**: Displays the product category name.

- **Sub-Category Code**: Displays the unique identification number for the product sub-category

- **Sub-Category Code**: Displays the sub-category name.

- Showing 1 to 10 of 327 entries: Displays the number of products get displayed out of total products.

4.1.1.2. Edit Product Details

In this section, you can understand how to edit the product details. The product details gets appended from the ERP. You can edit only the sub-category name. You can also view and modify the product image.

To edit the product details, do the following:

1. On the Product Details screen, click [edit icon] icon corresponding to the product name you want to edit. The PTODUCTS screen appears as shown in the image.
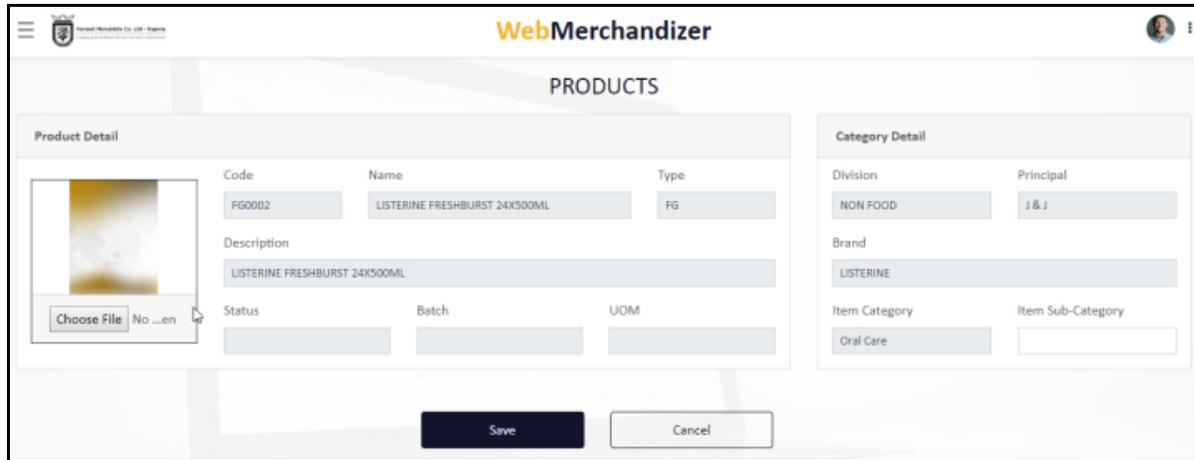

Figure 4: Product_Edit

2. By default, Product details get fetched from the ERP. You can modify or add only the sub-category name.

3. Click Choose File to change the image.

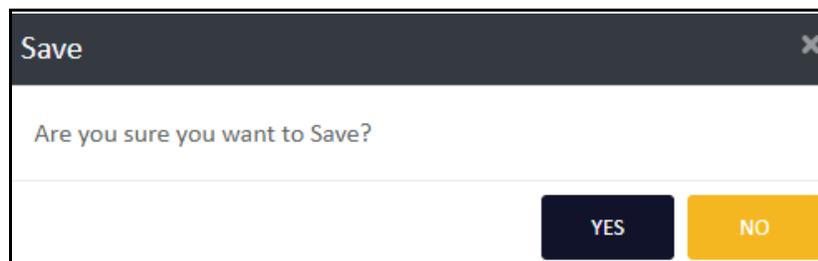4. Click **SAVE**. A confirmation message appears as shown in the image.

Figure 5: Confirmation to Save the Product details

5. Click **YES** to save the product details.

   ▪ If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.
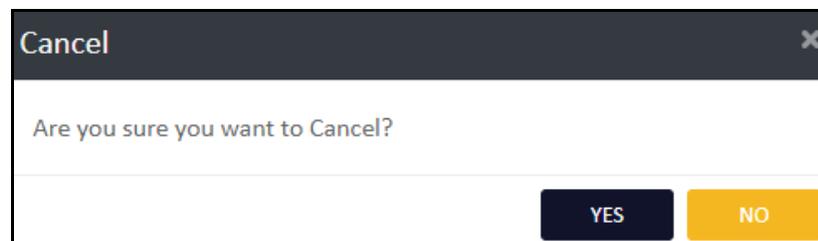
Figure 6: Confirmation to cancel the product update

   ▪ Click **YES** to cancel the update.

4.1.2. Working with Customer Master

In this section, you can understand how to view the list of customers and add the shipping details to the customer. You can also edit the customer details based on your need.

The following are explained in details:

- *"View Customer List" on page 12*

- *"Edit Customer Details" on page 14*

4.1.2.1. View Customer List

To view the list of products, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
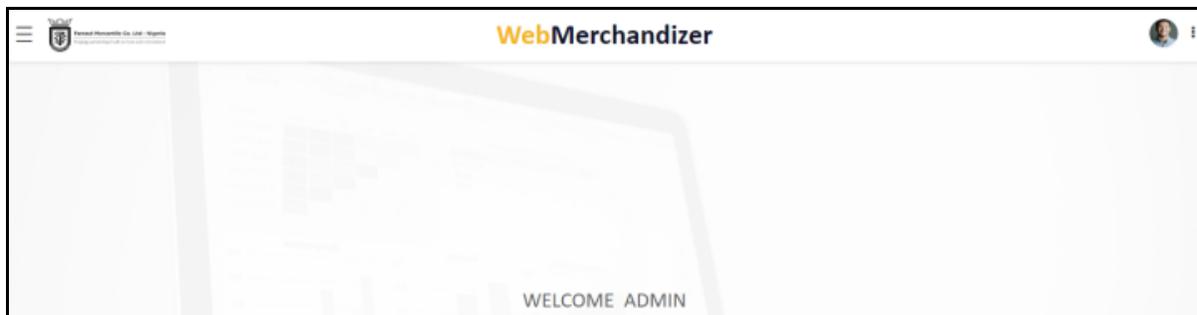
Figure 7: WebMerchandizer Welcome

2. On the screen, click ☝ 🛡️ _____ icon. The menu appears as shown in the image.
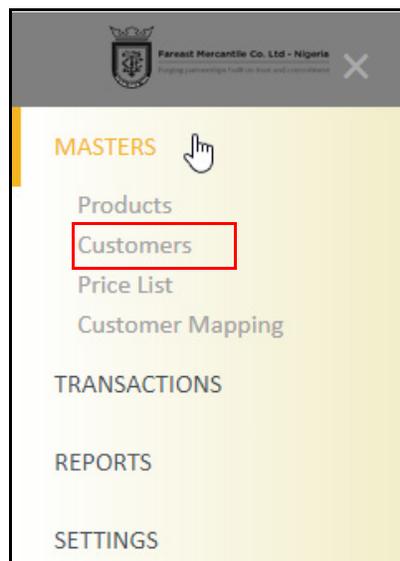
Figure 8: WebMerchandizer Menu

3. Click **MASTERS > Customers**. The CUSTOMER DETAILS screen appears as shown in the image.

Figure 9: Customer Details

> Scroll right to view the hidden fields in the screen. The customer details screen displays the price list based on the customer code for the first 10 customer. You can use the page navigation to view the next set of list, click **Next** or click the page number to view the next set of list. The page navigation is on the right down corner of the screen as highlighted.

4. On the screen, you can view the following:

- Show 10 ▼ entries : Click the drop-down arrow to set the list of customer details to display on the summary table.

- Search: _____ : Enter the search parameter on the text box to display the search result on the summary table.

- **Edit**: Click ✎ icon to edit the customer details and add the shipping details.

- **Customer Name**: Displays the name of the customer.

- **Customer Code**: Displays the code for the customer.

- **Customer Type**: Displays the type of customer.

- **Status**: Displays the status of the customer.

- **Images**: Displays the image file name.

- **Mobi**le **Number**: Displays the customer mobile number

- **Email**: Displays the email ID of the contact person.

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- **Address 1**: Displays the customer address, line one details.

- **Address 2**: Displays the customer address from the line two.

- **Address 3**: Displays the customer address from the line three.

- **Contact Person**: Displays the contact person name.

- **Latitude**: Displays the latitude value for the customer address.

- **Longitude**: Displays the longitude value for the customer address.

- **Price List**: Displays the price list which is assigned to the customer.

- **Price Discount**: Displays the discounted price for the products (If any).

- **Credit Term**: Displays the credit term accepted for the customer.

- **Payment Term**: Displays the payment term accepted for the customer.

- **Location**: Displays the customer location.

- **LGA**: Displays the name of the Local Government Authority.

- **City**: Displays the customer city.

- **State**: Displays the state name.

- **Region**: Displays the region name.

- **Customer Group**: Displays the customer group.dx3

- Showing 1 to 10 of 327 entries : Displays the number of customer get displayed out of total customer list.

4.1.2.2. Edit Customer Details

In this section, you can understand how to view the customer details in a detailed view.

To edit the customer details, do the following:

1. On the Customer Details screen, click [edit icon] icon corresponding to the customer name you want to edit. The CUSTOMER screen appears as shown in the image.
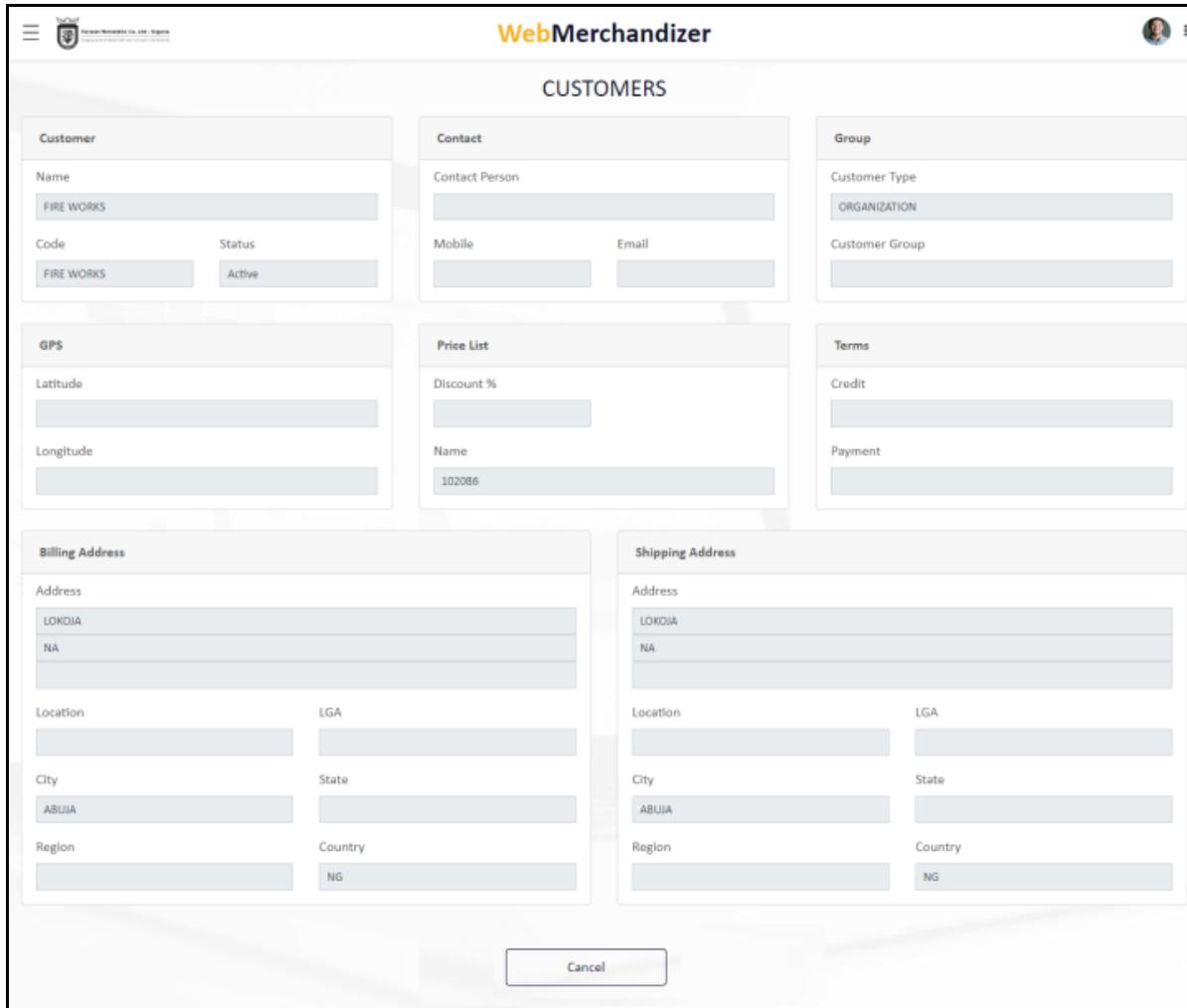
Figure 10: Customer_Edit

2. You can only view the customer details.

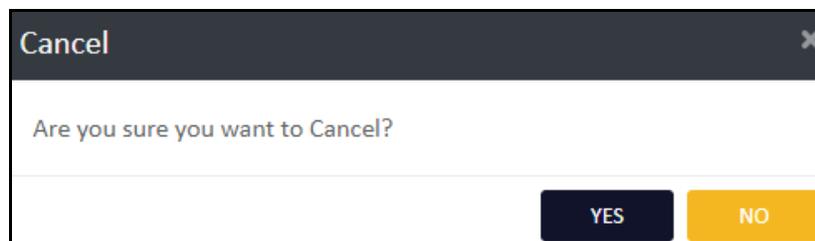3. Click **Cancel**. A confirmation message appears as shown in the image.

Figure 11: Confirmation to cancel the Customer update.

4. Click **YES** to exit the customer details screen.

4.1.3. Working with Price List Master

In this section, you can understand how to view the price list.

The following sections are explained in details:

- *"View Price List details" on page 16*

- *"Edit Price List Details" on page 18*

4.1.3.1. View Price List details

In this section, you can understand how to view the list of price list generated.

To view the price list, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
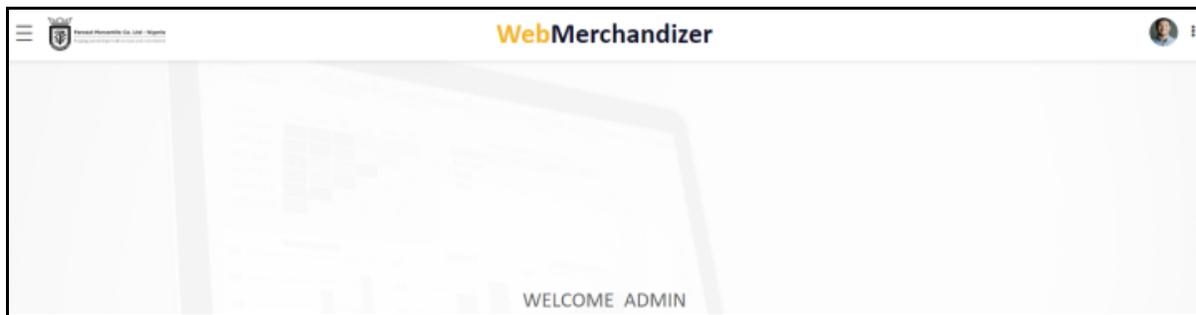
Figure 12: WebMerchandizer Welcome

2. On the screen, click ⬇ [icon] icon. The menu appears as shown in the image.
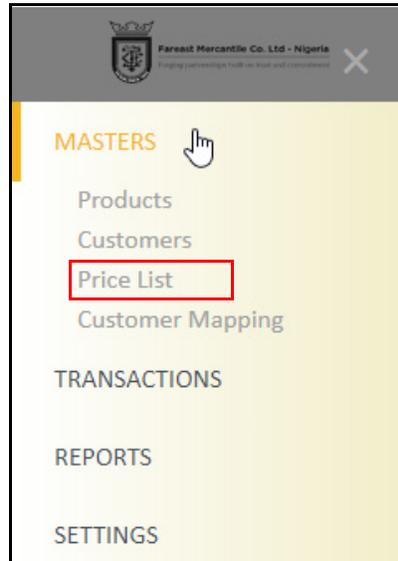
Figure 13: WebMerchandizer Menu

3. Click **MASTERS > Price List**. The PRICE LIST DETAILS screen appears as shown in the image.
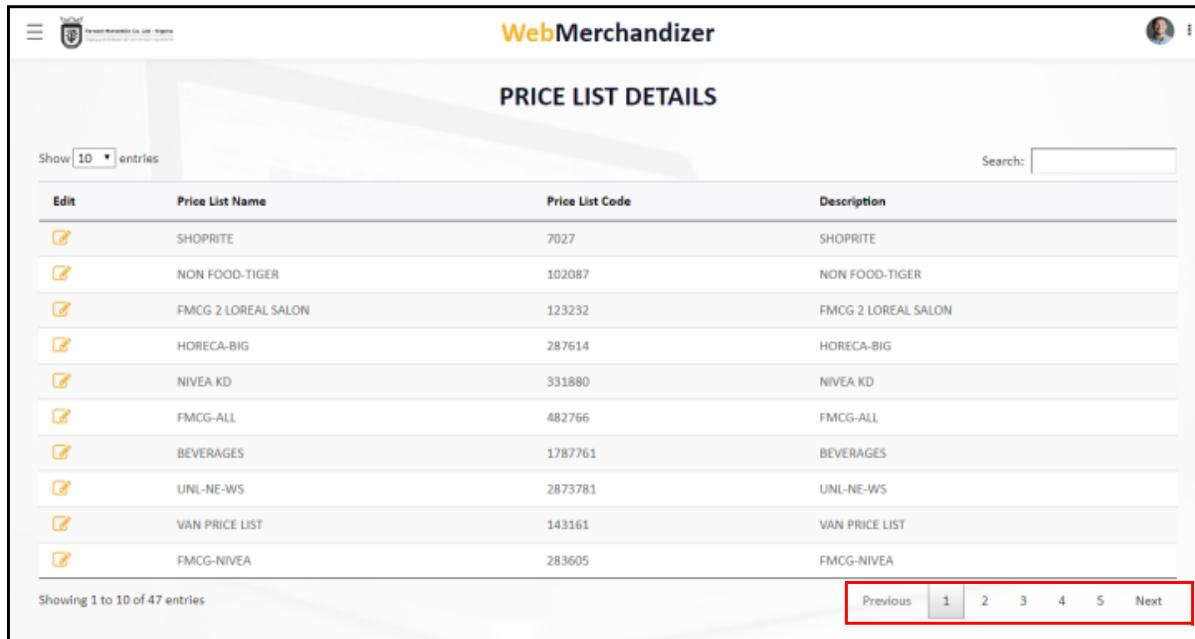
Figure 14: Product Details

> Scroll right to view the hidden fields in the screen. The Price list details screen displays the price list based on the product code for the first 10 products. You can use the page navigation to view the next set of list, click **Next** or click the page number to view the next set of list. The page navigation is on the right down corner of the screen as highlighted.

4. On the screen, you can view the following:

- Show 10 ▼ entries : Click the drop-down arrow to set the list of customer details to display on the summary table.

- Search: [   ] : Enter the search parameter on the text box to display the search result on the summary table.

- **Edit**: Click ✏ icon to edit the price list details.

- **Price List Name**: Displays the name for the price list.

- **Price List Code**: Displays a code for the price list.

- **Description**: Displays a short description for the price list.

- Showing 1 to 10 of 11 entries : Displays the number of price list name get displayed out of total price list.

4.1.3.2. Edit Price List Details

In this section, you can understand how to edit the details for a price list.

To edit the price list details, do the following:

1. On the PRICE LIST DETIALS screen, click ✏ icon corresponding to the price list name you want to edit. The PRICE LIST screen appears as shown in the image.

Figure 15: Price List_Edit

2. By default, Price List details get fetched from the ERP. You can modify the following fields:

- **Description**: Displays the short description about the product.

- **Status**: Displays the status of the price list.

- **Effective Start Date**: Select the date from when the price list is set to active or inactive using date picker.

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- **Effective End Date**: Select the date up to when the price list is set to active or inactive using date picker.

3. Click **SAVE**. A confirmation message appears as shown in the image.
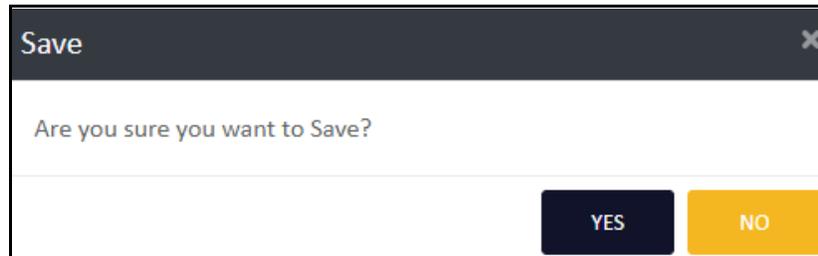
Figure 16: Confirmation to Save the details

4. Click **YES** to save the details.

- If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.
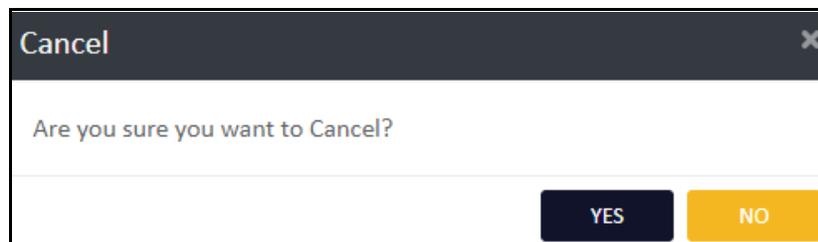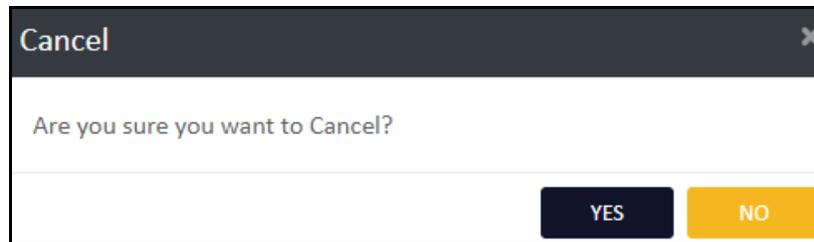

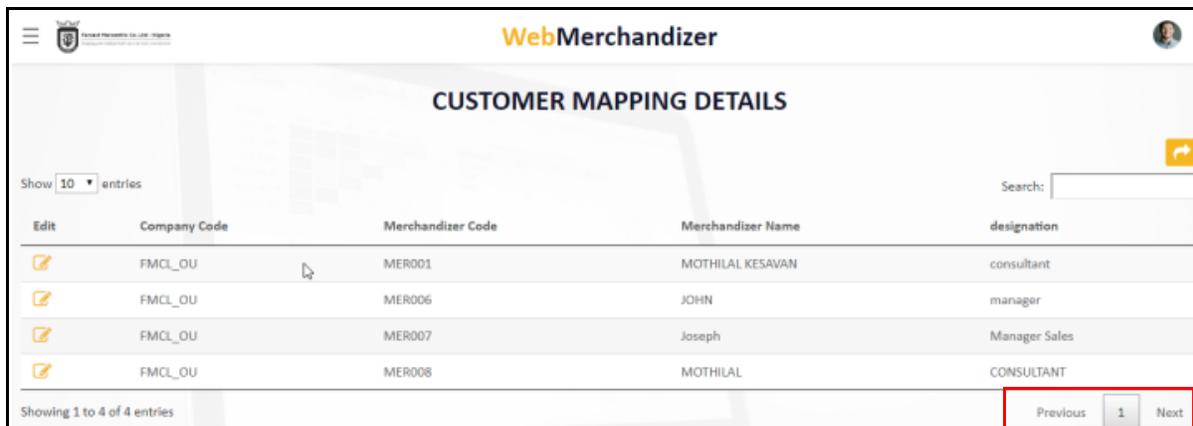**Figure 17: Confirmation to cancel the update.**

- Click **YES** to cancel the update.

4.1.4. Customer Mapping

In customer mapping, you can map the customer to a merchandizer to perform the task.

The following sections are explained in details:

- *"Mapping the customer to Merchandizer" on page 19*

- *"View Customer Mapping Details" on page 22*

- *"Edit Customer Mapping Details" on page 23*

4.1.4.1. Mapping the customer to Merchandizer

In this section, you can understand how to map the customer to the merchandizer.

To map the customer, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
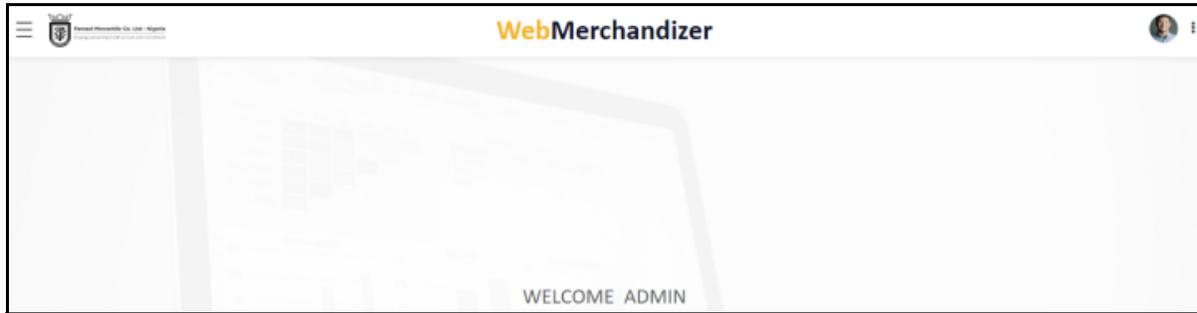
Figure 18: WebMerchandizer Welcome

2. On the screen, click [icon] [icon] icon. The menu appears as shown in the image.
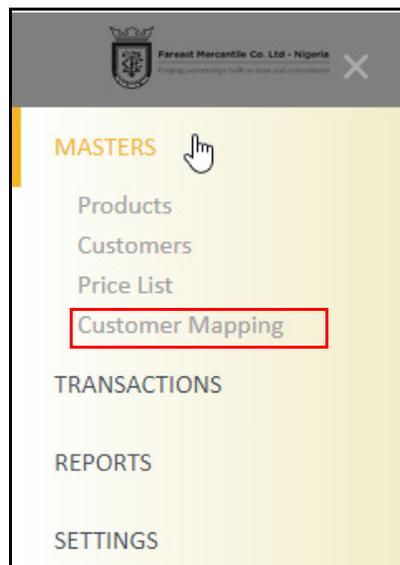
Figure 19: WebMerchandizer Menu

1. Click **MASTERS > Customer Mapping**. The CUSTOMER MAPPING DETAILS screen appears as shown in the image.

Figure 20: Customer Mapping

2. Select the **Merchandizer Name** from the drop-down list.

3. The **Designation** gets appended by the application from the customer master.

4. Select the **Customer Name** from the drop-down list.

5. Select the product division from the **Division** drop-down list.

6. Select the principal for the division from the **Principal** drop-down list.

7. Select the brand for the principal from the **Brand** drop-down list.

8. Click ■ icon to delete a row from the grid.

9. Click **SAVE**. A confirmation message appears as shown in the image.

Figure 21: Confirmation to Save the details

10. Click **YES** to save the details.

- If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.

Figure 22: Confirmation to cancel the update.

- Click **YES** to cancel the update.

4.1.4.2. View Customer Mapping Details

In this section, you can understand how to view the mapped customer.

To view the mapped customer, do the following:

1. On the CUSTOMER MAPPING screen, click [icon] icon to view the summary table. The Customer Mapping details screen appears as shown in the image.


Figure 23: View_Customer Mapping Details

2. On the screen, you can view the following:

- Show 10 ▼ entries : Click the drop-down arrow to set the list of customer details to display on the summary table.

- Search: [____] : Enter the search parameter on the text box to display the search result on the summary table.

- **Edit**: Click [icon] icon to edit the customer mapping details.

- **Company Code**: Displays the company code.

- **Merchandizer Code**: Displays the merchandizer code.

- **Designation**: Displays the designation of the merchandizer.

- ▣ : Enables you to map the Customer to the merchandizer.

- Showing 1 to 10 of 11 entries: Displays the number of price list name get displayed out of total price list.

4.1.4.3. Edit Customer Mapping Details

In this section, you can understand how to edit the customer mapping details.

To edit the customer mapping details, do the following:

1. On the CUSTOMER MAPPING screen, click ▣ icon to view the summary table. The Customer Mapping details screen appears as shown in the image.

Figure 24: View_Customer Mapping Details

2. On the CUSTOMER MAPPING DETIALS screen, click icon corresponding to the company code you want to edit. The CUSTOMER MAPPING screen appears as shown in the image.
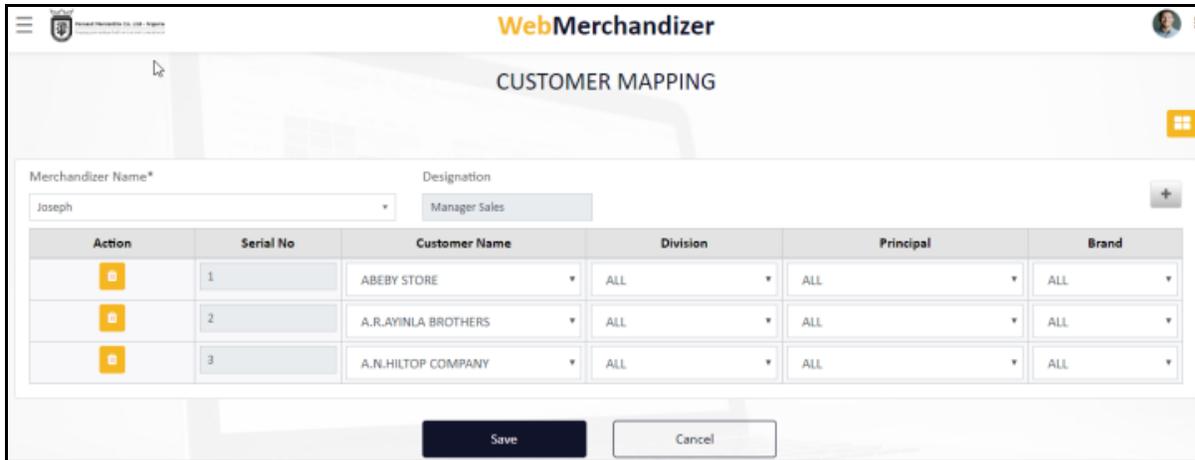
Figure 25: Edit_Customer Mapping

3. Modify the fields you want.

4. Click **SAVE**. A confirmation message appears as shown in the image.
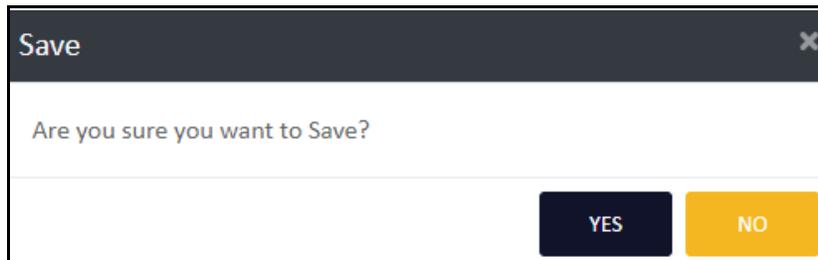
Figure 26: Confirmation to Save the details

5. Click **YES** to save the details.

  ▪ If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.
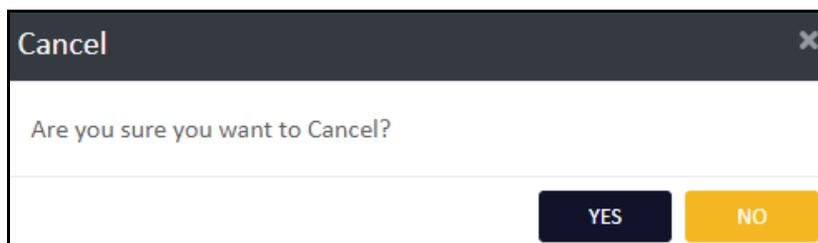
Figure 27: Confirmation to cancel the update.

  ▪ Click **YES** to cancel the update.

Chapter 5

5.1. Manage Transactions

A transaction is a task that satisfy a request and ensure database integrity. For a transaction to be completed and database changes to made permanent, a transaction has to be completed in its entirety.

In WebMerchandizer, you can create a journey plan for the merchandizer. The application allows you to upload any supporting document related to products and services. You can also create scheme for the product.

The following are the section explained in detail:

- **Journey Plan:** You can create a journey plan for the Merchandizer. For more information see *"Manage Journey Plan" on page 25*.

- **Scheme:** You can create a scheme for the product and service. For more information see *"Manage Scheme" on page 32*.

- **Artifact:** You can upload the supporting document related to the product or service. For more information see *"Manage Scheme" on page 32*.

5.1.1. Manage Journey Plan

In Journey plan, you can create a journey plan for a merchandizer. You can create a journey plan for the merchandizer for one week. After saving the plan for a week, you can create a journey plan for next week. Based on the journey plan the merchandizer can follow the journey every day and update the Superior.

The following are the sections explained in detail:

- *"Create Journey Plan" on page 26*
- *"View Journey Plan" on page 28*
- *"Edit Journey Plan" on page 30*

5.1.1.1. Create Journey Plan

In this section, you can understand how to create journey plan. You can create a journey plan based on the merchandizer you select. The you view the journey plan for one week. The application allows you to create journey plan for any number of week you want. Based on the date you select in the calendar, you can create or view the journey plan.

To create journey plan, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
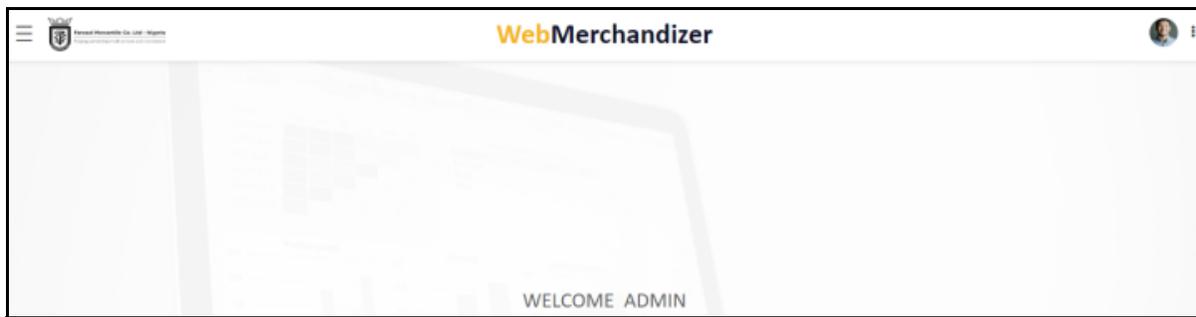
Figure 1: WebMerchandizer Welcome

2. On the screen, click [icon] [icon] icon. The menu appears as shown in the image.
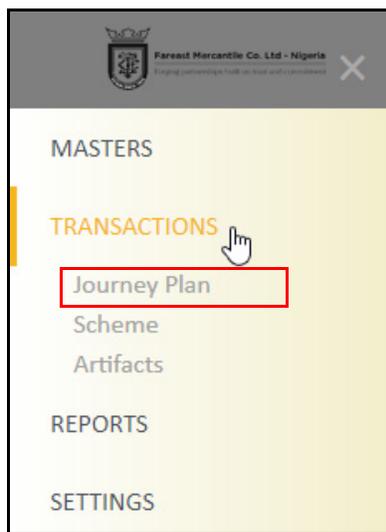
Figure 2: WebMerchandizer Menu

3. Click **TRANSACTIONS > Journey Plan**. The JOURNEY PLAN screen appears as shown in the image.
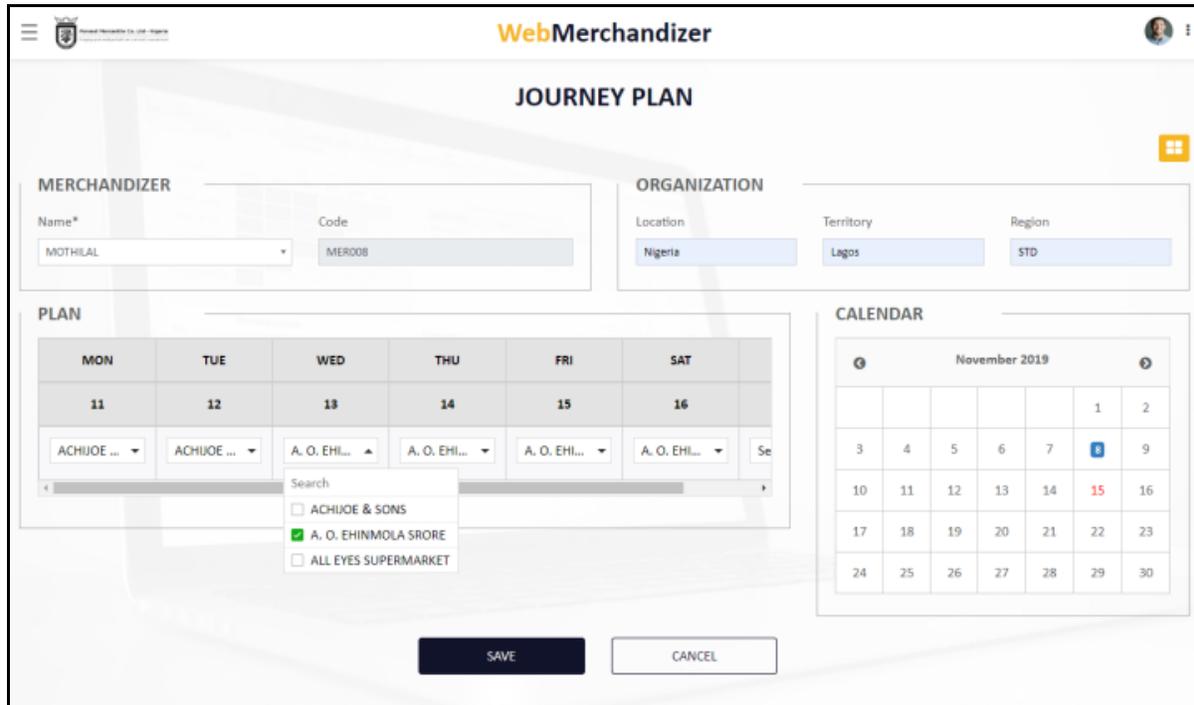
Figure 3: Journey Plan

4. Select the Merchandizer name from the **Name** drop-down list.

5. System auto-populates the merchandizer code in the **Code** text box.

6. Enter your organization location in the **Location** text box.

> The system auto-populates the entered location.

7. Enter your organization territory name in the **Territory** text box.

> The system auto-populates the entered Territory.

8. Enter your organization region in the **Region** text box.

> The system auto-populates the entered Region.

9. Select a week from the **CALENDAR**. The plan for the view displays on the left side of the screen.

10. Select the route based on the route type from **Monday** to **Sunday.**
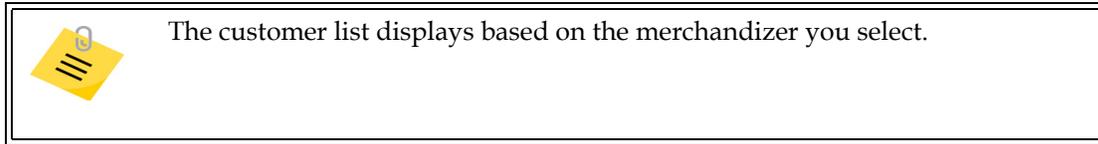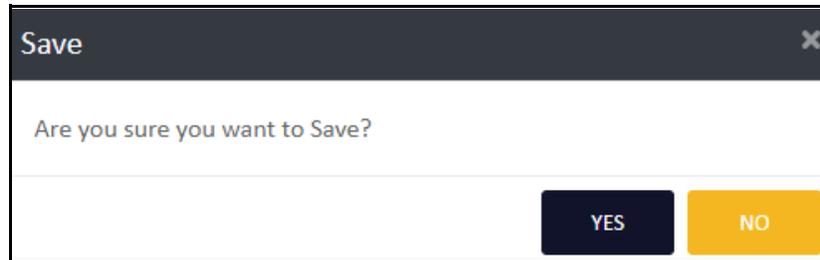
> The customer list displays based on the merchandizer you select.

11. Click **SAVE**. A confirmation message appears as shown in the image.

Figure 4: Confirmation to Save the Product details

12. Click **YES** to save the product details.

- If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.
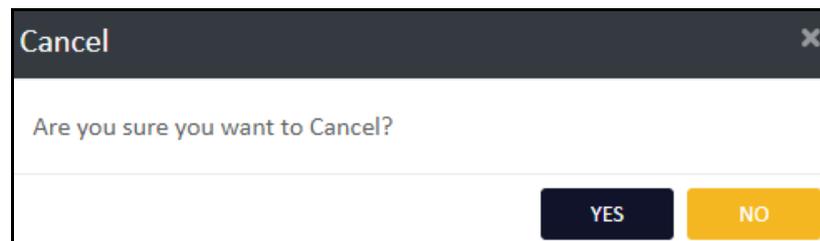
Figure 5: Confirmation to cancel the product update

- Click **YES** to cancel the update

5.1.1.2. View Journey Plan

In this section, you can understand how to view the journey plan assigned to the merchandizer.

To view the journey plan, do the following:

1. On the JOURNEY PLAN screen, click icon on the top right corner of the screen. The JOURNEY PLAN DETAILS screen appears as shown in the image.
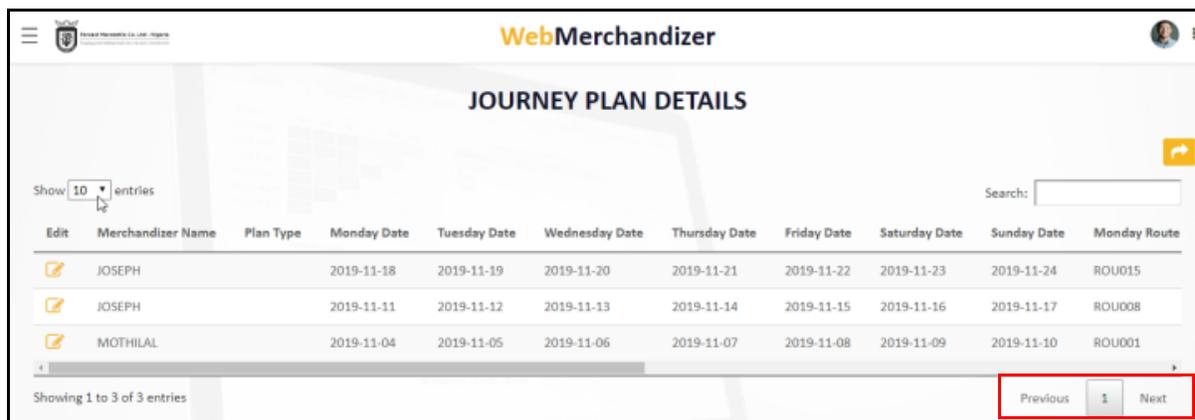

Figure 6: Journey Plan Details

> The JOURNEY PLAN details screen displays the plan list based on the merchandizer for the first 10 journey details. To view the next 10 route, click **Next** or click the page number you want to view which is on the right down corner of the screen as highlighted.

2. On the screen, you can view the following:

- **Show 10 ▼ entries** : Click the drop-down arrow to set the list of journey plan to display on the summary table.

- **Search:** : Enter the search parameter on the text box to display the search result on the summary table.

- **Edit**: Click icon to edit the journey plan details.

- **Merchandizer Name**: Displays the Merchandizer name to whom the route was assigned.

- **Plan Type**: Displays the type for the route.

- **Monday Date**: Displays all Monday dates to which the route is assigned to the Merchandizer.

- **Tuesday Date**: Displays all Tuesday dates to which the route is assigned to the Merchandizer.

- **Wednesday Date**: Displays all Wednesday dates to which the route is assigned to the Merchandizer.

- **Thursday Date**: Displays all Thursday dates to which the route is assigned to the Merchandizer.

- **Friday Date**: Displays all Friday dates to which the route is assigned to the Merchandizer.

- **Saturday Date**: Displays all Saturday dates to which the route is assigned to the Merchandizer.

- **Sunday Date**: Displays all Sunday days to which the route is assigned to the Merchandizer.

- **Monday Route**: Displays the route assigned for Monday to the Merchandizer.

- **Tuesday Route**: Displays the route assigned for Tuesday to the Merchandizer.

- **Wednesday Route**: Displays the route assigned for Wednesday to the Merchandizer.

- **Thursday Route**: Displays the route assigned for Thursday to the Merchandizer.

- **Friday Route**: Displays the route assigned for Friday to the Merchandizer.

- **Saturday Route**: Displays the route assigned for Saturday to the Merchandizer.

- **Sunday Route**: Displays the route assigned for Sunday to the Merchandizer.

- **Location**: Displays your organization location.

- **Territory**: Displays your organization territory.

- **Region**: Displays your organization region.

- Showing 1 to 10 of 327 entries: Displays the number of journey plan get displayed out of total journey plan list.

- : Click to create journey plan.

5.1.1.3. Edit Journey Plan

In this section, you can understand how to edit the journey plan assigned to the BDE.

To edit the journey plan, do the following:

1. On the JOURNEY PLAN screen, click icon on the top right corner of the screen. The JOURNEY PLAN DETAILS screen appears as shown in the image.

Figure 7: Journey Plan Details

2. Click ![edit icon] icon. The JOURNEY PLAN screen appears as shown in the image.
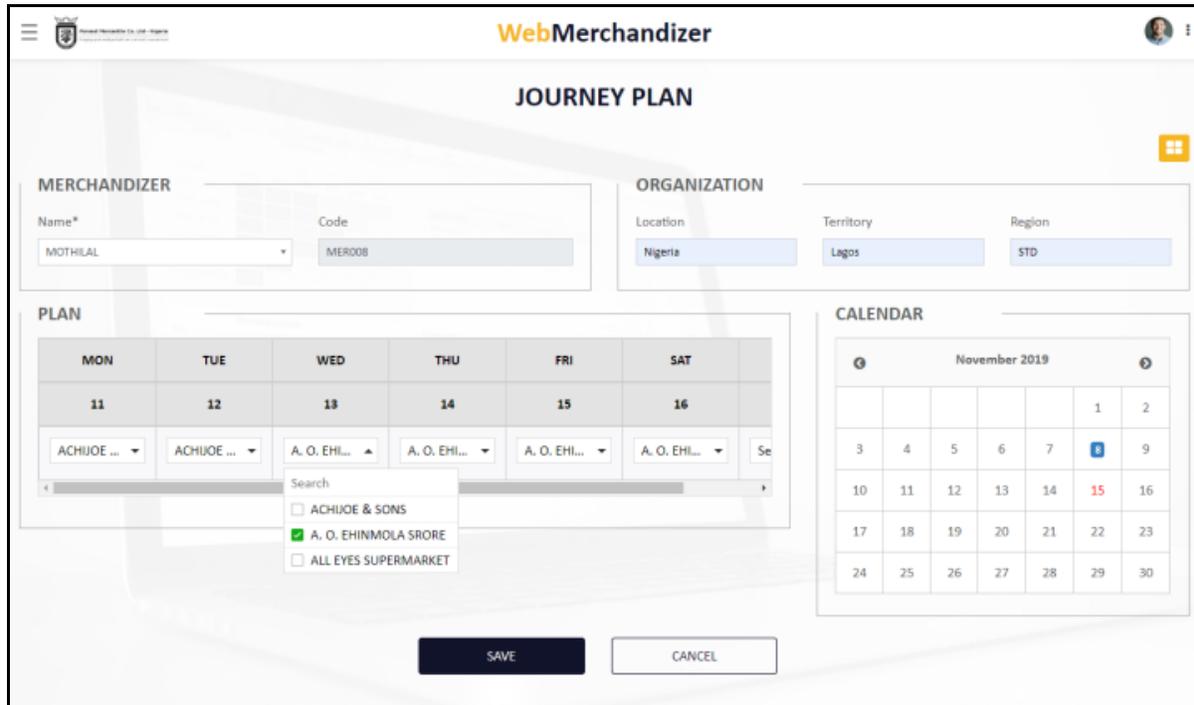
Figure 8: Journey Plan

3. If you want, you can modify the editable fields.

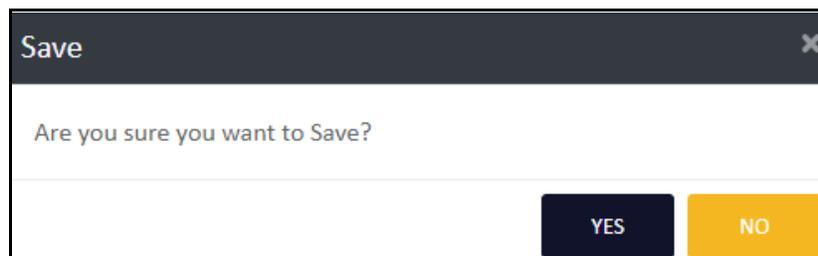4. Click **SAVE**. A confirmation message appears as shown in the image.
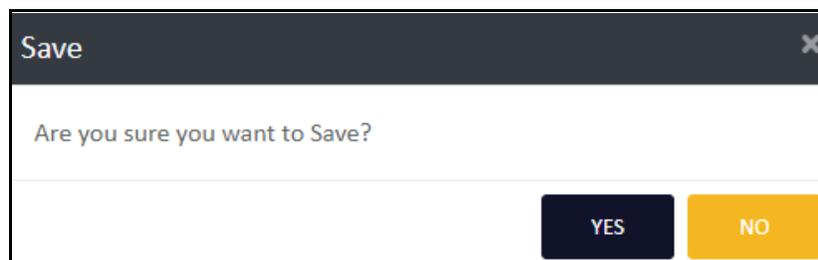
Figure 9: Confirmation to Save the Product details

5. Click **YES** to save the product details.

- If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.
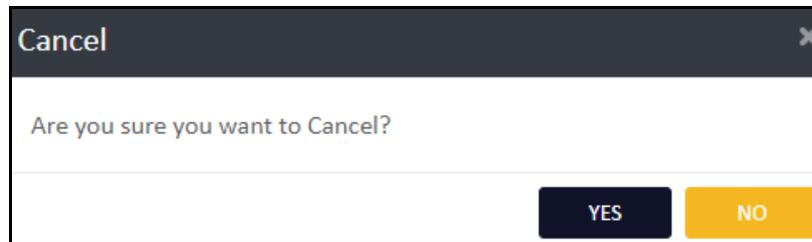
Figure 10: Confirmation to cancel the product update
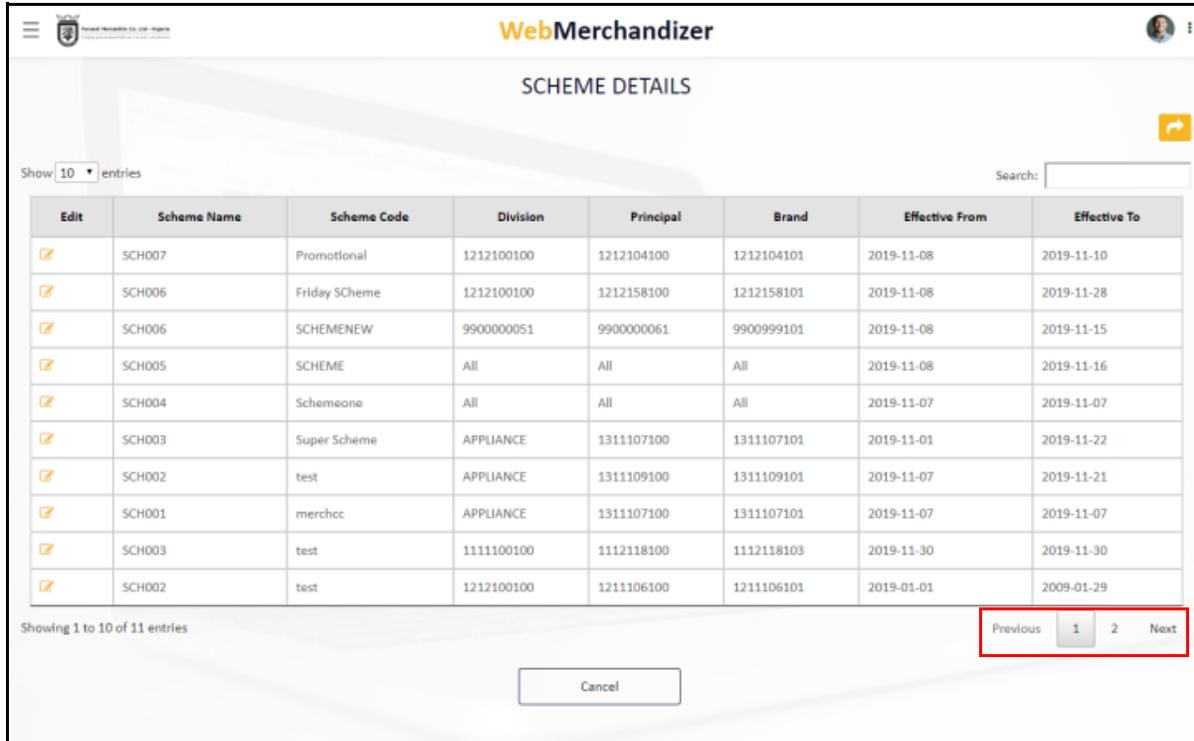
- Click **YES** to cancel the update.

5.1.2. Manage Scheme

A scheme is a systematic plan or arrangement for attaining some particular object or converting an idea into effect.

In WebMerchandizer, scheme is a promotional activity where you can create a scheme for a product in terms of value, discount, or Free of Cost (FOC).

The following sections are explained in details:

- *"Create Scheme" on page 32*
- *"View Scheme" on page 35*
- *"Edit Scheme" on page 37*

5.1.2.1. Create Scheme

In this section, you can understand how to create scheme.

To create scheme, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
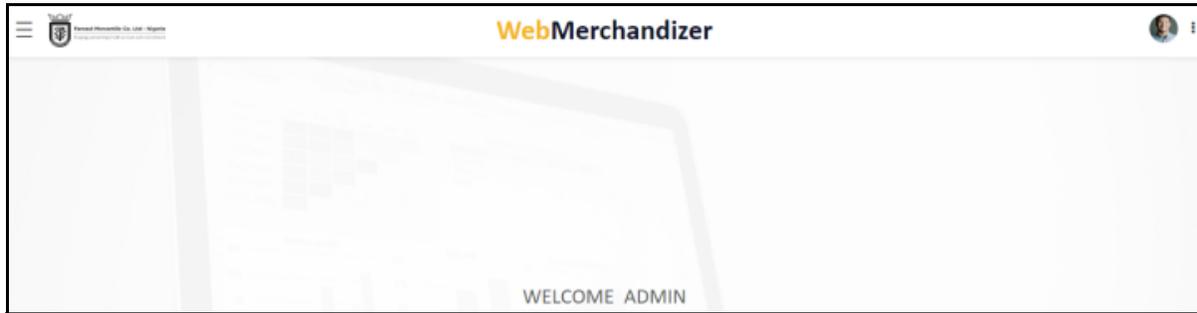
Figure 11: WebMerchandizer Welcome

2. On the screen, click icon. The menu appears as shown in the image.
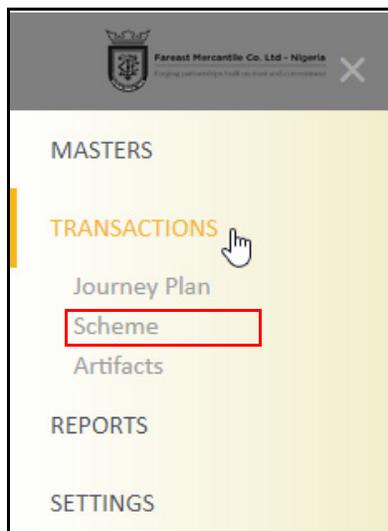
Figure 12: WebMerchandizer Menu

3. Click **TRANSACTIONS > Scheme**. The SCHEME/PROMOTION screen appears as shown in the image.

Figure 13: Scheme

4. System auto-populates a scheme code in the **Scheme Code** text box.

5. Enter a scheme name in the **Scheme Name** text box.

6. Select the Product Division from the **Division** drop-down list.

7. Select the principal name from the **Principal** drop-down list.

8. Select the brand name from the **Brand** drop-down list.

9. Select the scheme effective date from the **Effective From** date picker.

10. Select the scheme end date from the **Effective To** date picker.

11. You can select multiple product or all the products from the **Product Name** drop-down list.

12. Select the customer name from the **Customer** drop-down list.

13. Enter a short description about the scheme in the **Scheme Description** text box.

14. Click **SAVE**. A confirmation message appears as shown in the image.

Figure 14: Confirmation to Save the Product details

15. Click **YES** to save the product details.

- If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.
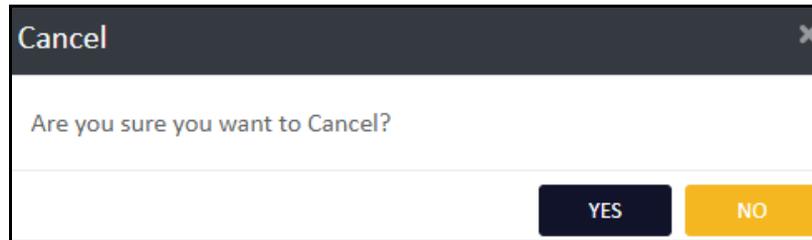
Figure 15: Confirmation to cancel the product update

- Click **YES** to cancel the update.

5.1.2.2. View Scheme

In this section, you can understand how to view the scheme details.

To view the scheme details, do the following:

1. On the SCHEME/PROMOTION screen, click ⬚ icon on the top right corner of the screen. The SCHEME DETAILS screen appears as shown in the image.

Figure 16: Scheme Details

| 📎	The Scheme details screen displays the scheme list based on the scheme code for the first 10 scheme details. To view the next 10 scheme, click **Next** or click the page number you want to view which is on the right down corner of the screen as highlighted.

2. On the screen, you can view the following:

- **Show 10 ▾ entries** : Click the drop-down arrow to set the list of scheme question to display on the summary table.

- **Search:** ⬚ : Enter the search parameter on the text box to display the search result on the summary table.

- **Edit**: Click ✏️ icon to edit the scheme details.

- **Scheme Name**: Displays the name if the scheme.

- **Scheme Code**: Displays the scheme code.

- **Division**: Displays the product division.

- **Principal**: Displays the product principal.

- **Brand**: Displays the product brand.

- **Effective From**: Displays the scheme effective start date.

- **Effective To**: Displays the scheme end date.

- Showing 1 to 10 of 327 entries : Displays the number of scheme get displayed out of total scheme list.

- : Click to create scheme.

5.1.2.3. Edit Scheme

In this section, you can understand how to edit the scheme details.

To edit the scheme details, do the following:

1. On the SCHEME screen, click icon on the top right corner of the screen. The SCHEME DETAILS screen appears as shown in the image.
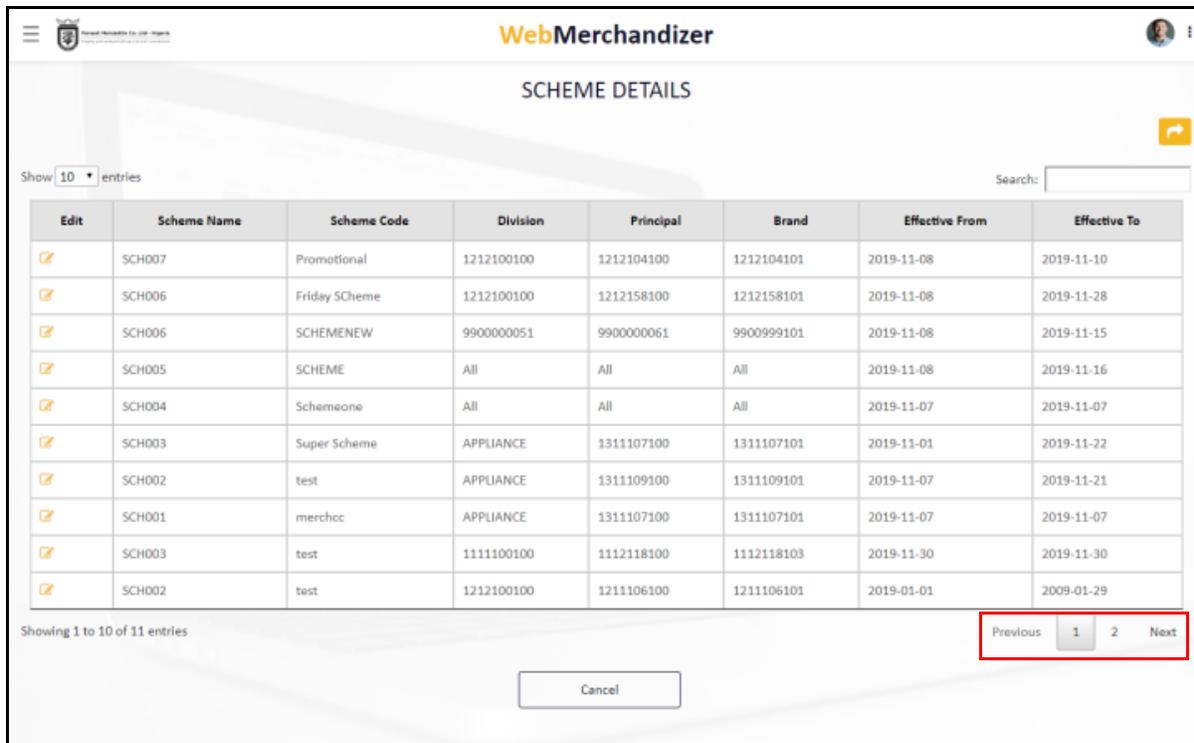
Edit	Scheme Name	Scheme Code	Division	Principal	Brand	Effective From	Effective To
☑	SCH007	Promotional	1212100100	1212104100	1212104101	2019-11-08	2019-11-10
☑	SCH006	Friday SCheme	1212100100	1212158100	1212158101	2019-11-08	2019-11-28
☑	SCH006	SCHEMENEW	9900000051	9900000061	9900999101	2019-11-08	2019-11-15
☑	SCH005	SCHEME	All	All	All	2019-11-08	2019-11-16
☑	SCH004	Schemeone	All	All	All	2019-11-07	2019-11-07
☑	SCH003	Super Scheme	APPLIANCE	1311107100	1311107101	2019-11-01	2019-11-22
☑	SCH002	test	APPLIANCE	1311109100	1311109101	2019-11-07	2019-11-21
☑	SCH001	merchcc	APPLIANCE	1311107100	1311107101	2019-11-07	2019-11-07
☑	SCH003	test	1111100100	1112118100	1112118103	2019-11-30	2019-11-30
☑	SCH002	test	1212100100	1211106100	1211106101	2019-01-01	2009-01-29

Showing 1 to 10 of 11 entries

Previous 1 2 Next

Cancel

Figure 17: Scheme Details

2. Click icon. The SCHEME / PROMOTION screen appears as shown in the image.
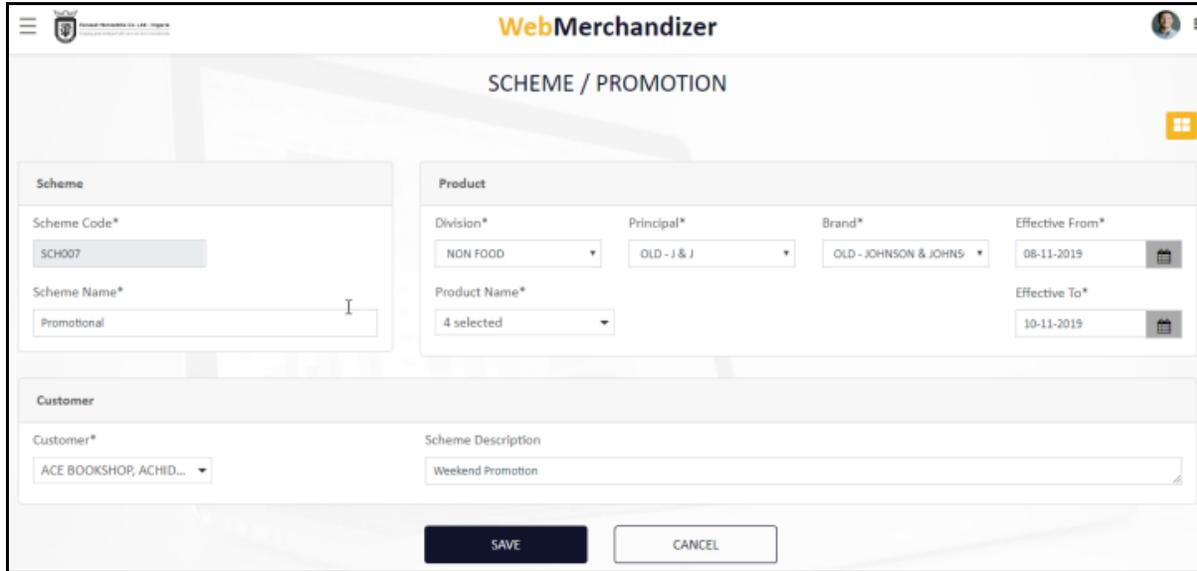
Figure 18: Scheme/Promotion_Edit

3. Modify the scheme details as per your requirement.

4. Click **SAVE**. A confirmation message appears as shown in the image.
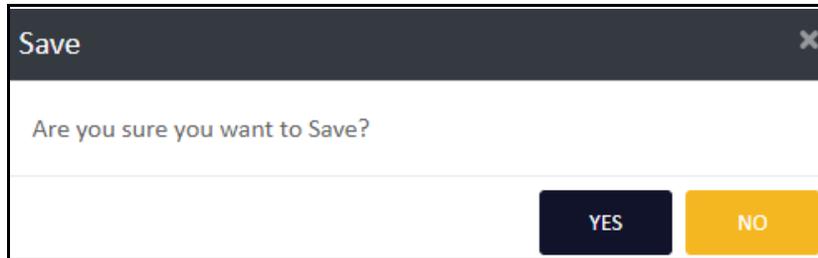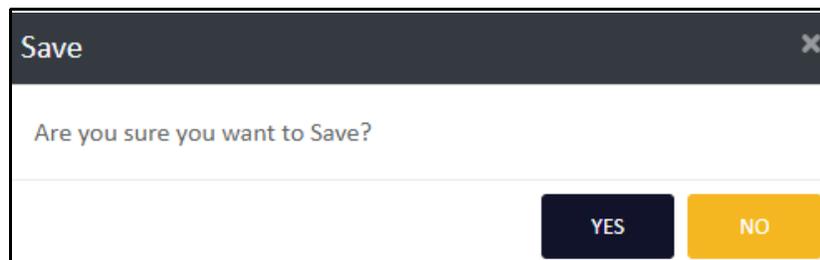

Figure 19: Confirmation to Save the Product details

5. Click **YES** to save the product details.

   ▪ If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.
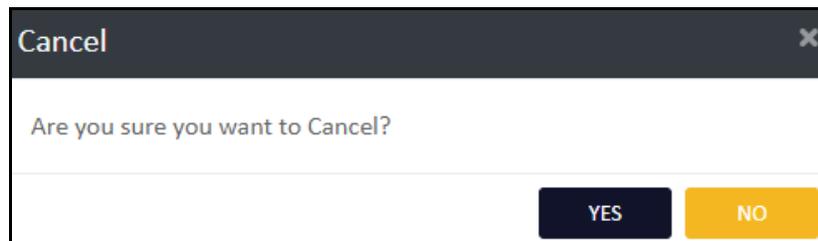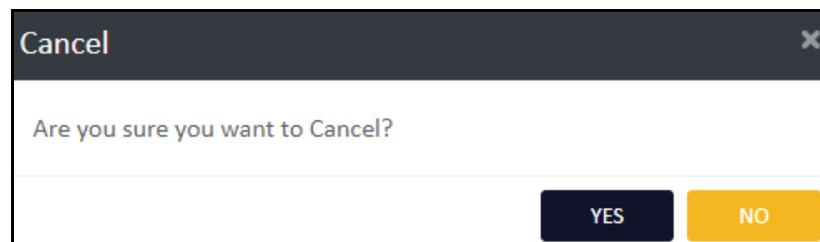

Figure 20: Confirmation to cancel the product update

   ▪ Click **YES** to cancel the update.

5.1.3. Manage Artifact

In artifact, you can upload a document which supports the product or services. You can select the artifact type and upload the document. You can also give rights to the merchandizer to download and view the file in the tab. The application allows you to activate or deactivate the artifacts.

> The following are the document format which will support for upload:
> PDF, Word, and image.
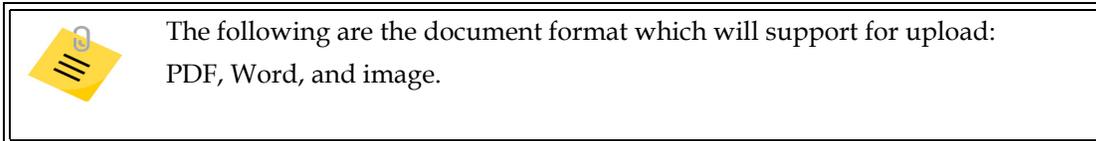
The following sections are explained in detail:

- *"Create Artifact" on page 39*

- *"View Artifact List" on page 41*

- *"Edit Artifact Details" on page 42*

5.1.3.1. Create Artifact

In this section, you can understand how to create artifacts based on type.

To create artifact, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
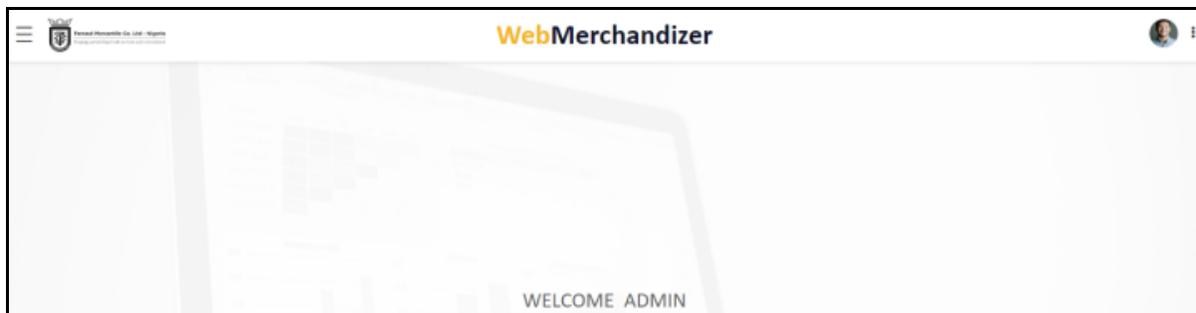
Figure 21: WebMerchandizer Welcome

2. On the screen, click [icon] [icon] icon. The menu appears as shown in the image.
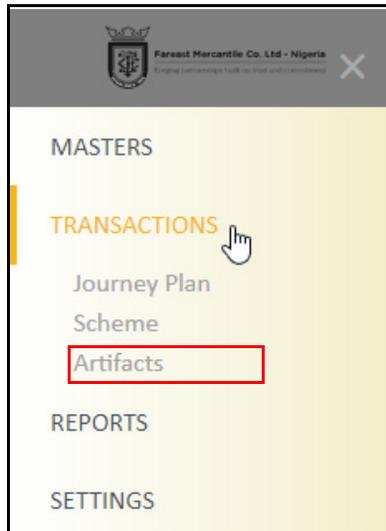
Figure 22: WebMerchandizer Menu

3. Click **TRANSACTIONS > Artifacts**. The ARTIFACT screen appears as shown in the image.
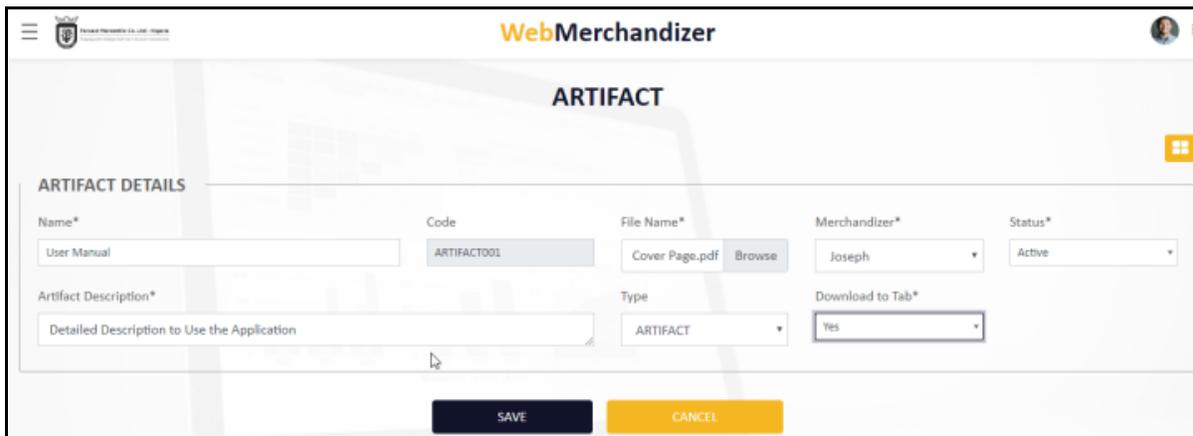
Figure 23: Artifact

4. Enter a name for the artifact in the **Name** text box.

5. System auto-populates the code for the artifact.

6. Click **BROWSE** and identify the document to upload as the artifact.

7. Select the Merchandizer name from the **Merchandizer** drop-down list.

8. Select a status for the artifact from the **Status** drop-down list.

9. Enter a short description for the artifact in the **Artifact Description** text box.

10. Select the type of artifact from the **Type** drop-down list.

11. Select **Yes** from the **Download to Tab** drop-down list to allow the Merchandizer to download the document from the tab.

> If you do not want the BDE to download the document from the tab, you can set it to **No**.
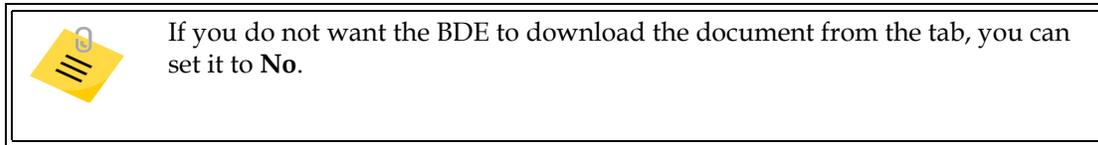
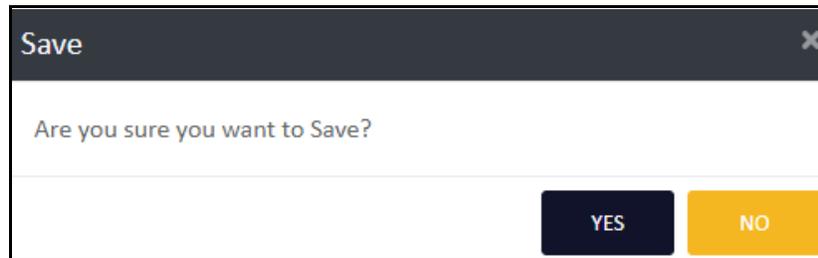12. Click **SAVE**. A confirmation message appears as shown in the image.

Figure 24: Confirmation to Save the Product details

13. Click **YES** to save the product details.

   ■ If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.
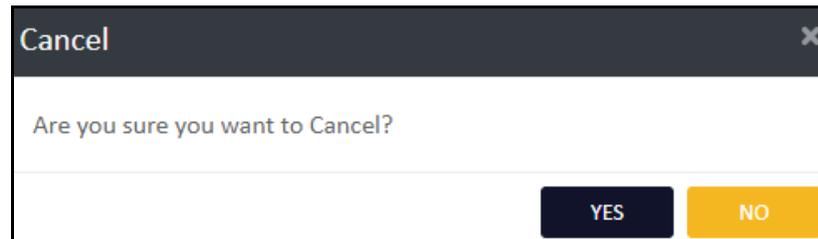

Figure 25: Confirmation to cancel the product update

   ■ Click **YES** to cancel the update.

5.1.3.2. View Artifact List

In this section, you can understand how to view the artifact list.

To view the artifact list, do the following:

1. On the ARTIFACT screen, click icon on the top right corner of the screen. The ARTIFACT DETAILS screen appears as shown in the image.
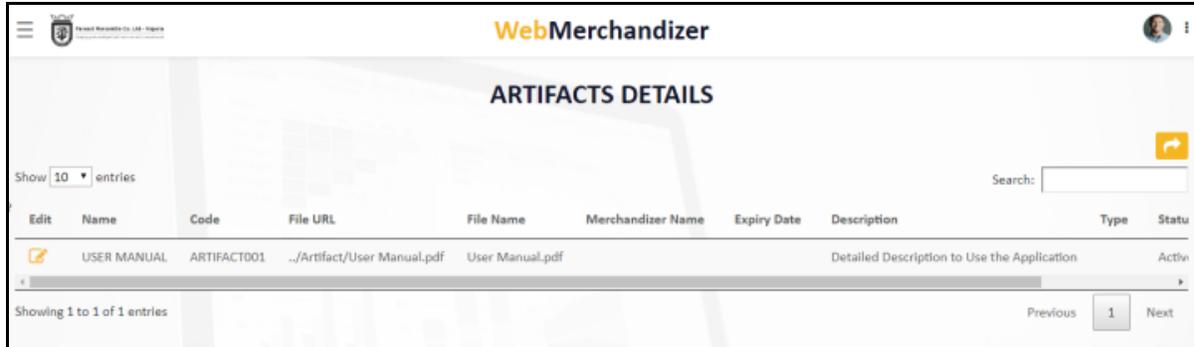
2. On the screen, you can view the following:

   ■ **Show 10 ▼ entries**: Click the drop-down arrow to set the list of Artifact to display on the summary table.

   ■ **Search:** : Enter the search parameter on the text box to display the search result on the summary table.

   ■ **Edit**: Click icon to edit the journey plan details.

   ■ **Name**: Displays the artifact name.

   ■ **Code**: Displays the artifact code.

   ■ **File URL**: Displays the path from where you can download the file.

   ■ **File Name**: Displays the file name.

   ■ **Merchandizer Name**: Displays the name of the BDE to whom the document is assigned.

   ■ **Expiry Date**: Displays the expiry date for the artifact.

   ■ **Description**: Displays the description of the artifact.

   ■ **Type**: Displays the type of the document.

   ■ **Status**: Displays the status of the artifact

   ■ **Download to Tab**: Displays the permission given to download the document from the tab.

   ■ **Showing 1 to 10 of 327 entries**: Displays the number of artifact get displayed out of total artifact list.

   ■ : Click to create artifact.

5.1.3.3. Edit Artifact Details

In this section, you can understand how to edit the details for the artifact.

To edit the artifact details, do the following:

1. On the ARTIFACT screen, click [icon] icon on the top right corner of the screen. The ARTIFACT DETAILS screen appears as shown in the image.
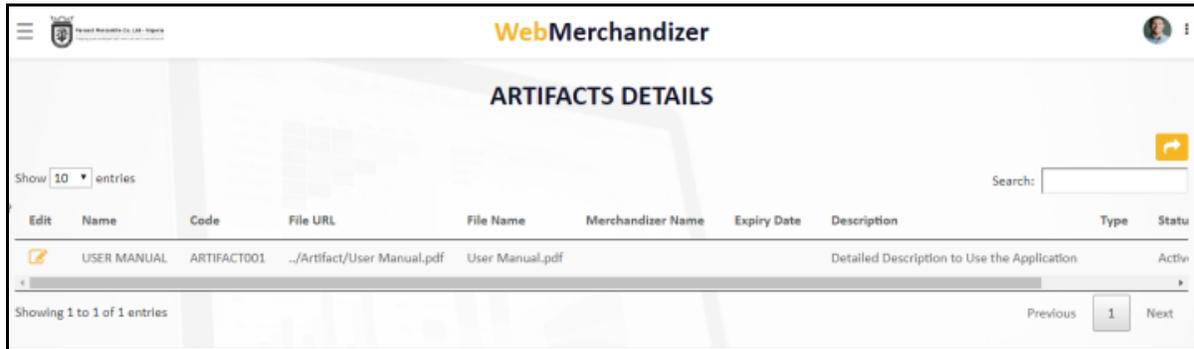
Figure 26: Artifact

2. Click [icon] icon. The ARTIFACTS screen appears as shown in the image.
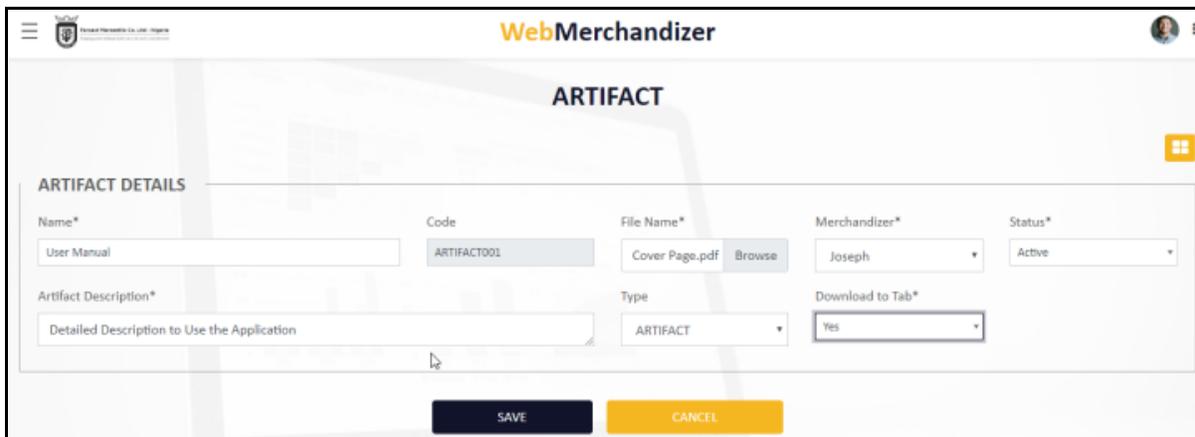
Figure 27: Artifact

3. If you want, you can modify the editable fields.

> All fields marked * are mandatory. You cannot edit the gray shaded fields.

4.   Click **SAVE**. A confirmation message appears as shown in the image.

Figure 28:   Confirmation to Save the Product details

5.   Click **YES** to save the product details.

■   If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.

Figure 29:   Confirmation to cancel the product update

■   Click **YES** to cancel the update.

Chapter 6

6.1. Manage Reports

A document containing information that organise the data in a narrative, graphic, or tabular form, prepared on ad hoc, periodic, recurring, regular, or as required basis. Reports may refer to specific periods, events, occurrences, or subjects, and may be communicated or presented in oral or written form.

In this section, you can understand how to manage the reports you receive from mMerchandizer application.

The following sections are explained in details:

- **Share of Shelf***:* Helps you to view the report for the task performed in the tab for share of shelf. For more Information see *"Generate Share of Shelf Report" on page 45*

- *RSP/SP:* Helps you to view the report for the task performed in the tab for Retail Selling Price/Selling Price. For more Information see *"Generate RSP/SP Report" on page 48*

- **Product Stock**: Helps you to view the report for the task performed in the tab for Product Stock. For more Information see *"Generate Product Stock Report" on page 50*

- **Promotions**: Helps you to view the report for the task performed in the tab for Promotion. For more Information see *"Generate Promotion Report" on page 52*

- **Product Sale**: Helps you to view the report for the task performed in the tab for Product Sale. For more Information see *"Generate Product Sale Report" on page 54*

- **Journey Tracker**: Helps you to view the report for the task performed in the tab for Journey Tracker. For more Information see *"Generate Journey Tracker Report" on page 56*

6.1.0.1. Generate Share of Shelf Report

In this section, you can understand how to generate a report for share of shelf.

> The share of shelf details is fetched from the tab application (mMerchandizer)

To generate share of shelf report, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
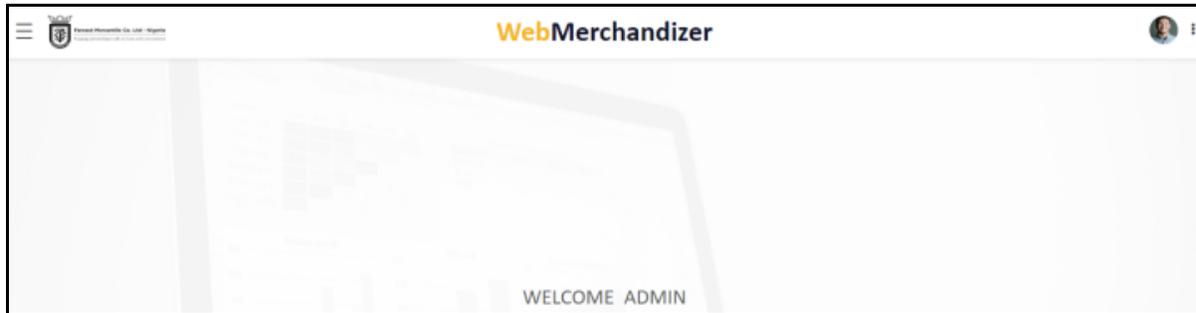
Figure 1: WebMerchandizer Welcome

2. On the screen, click ✋ 🛡 icon. The menu appears as shown in the image.

Figure 2: WebMerchandizer Menu

1. Click **Reports > Share of Shelf**. The SHARE OF SHELF screen appears as shown in the image.
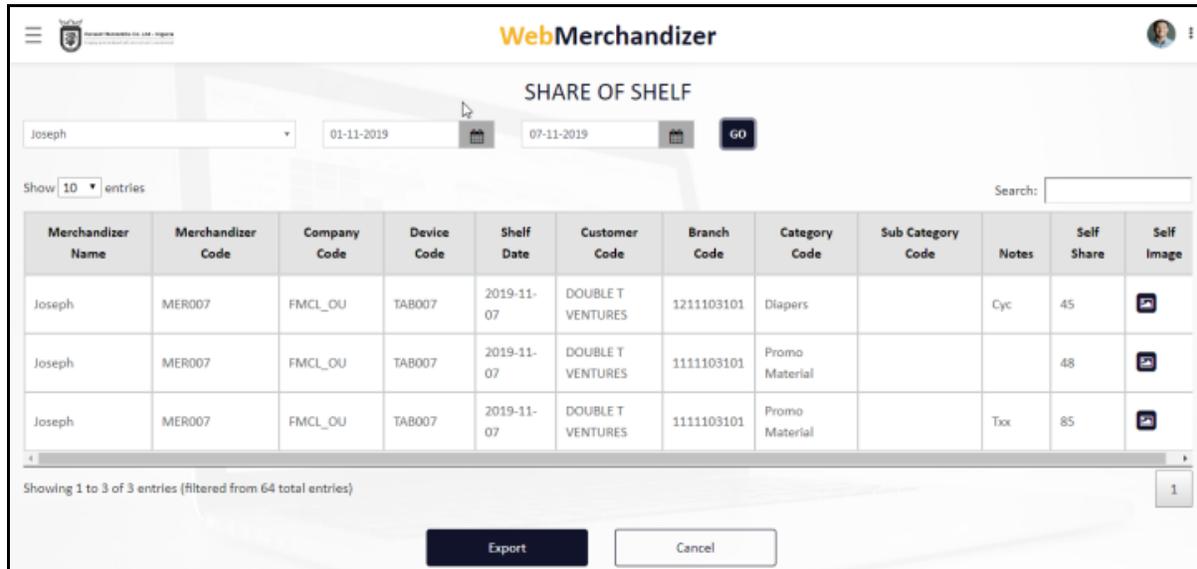
Figure 3: Share of Shelf
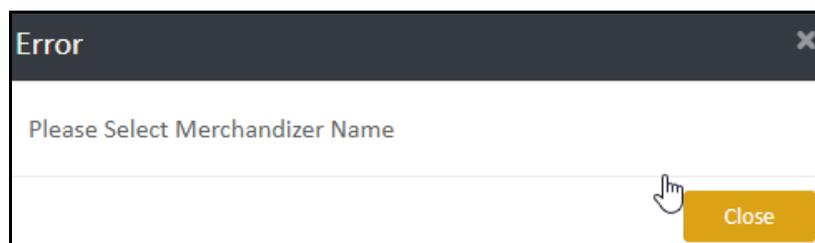
2. Select the merchandizer name from the drop-down list.

    ▪ If you try to fetch the report without selecting the merchandizer name. An error message appears as shown in the image.
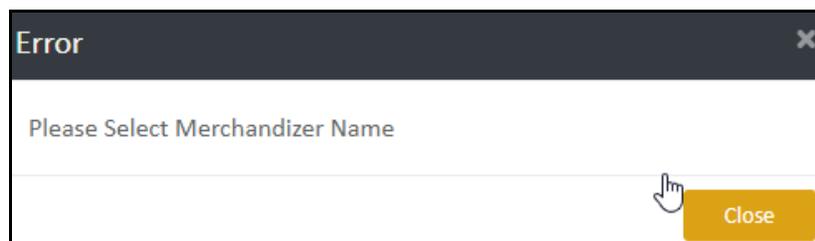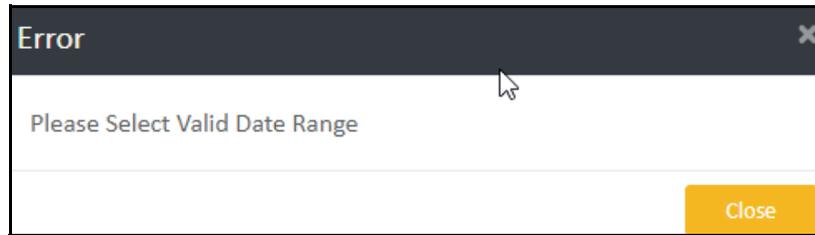

3. Select the date using the date picker from when you want to generate the report.

4. Select the date using the date picker until which date you want to generate the report.

    ▪ If the date you select is prior to the from date, an error message appears as shown in the image.
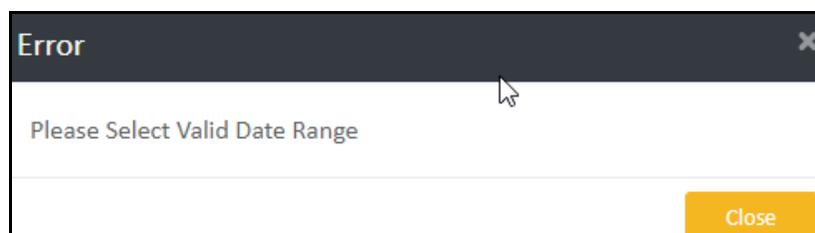
5. Click **GO** to fetch the search result in the summary table.

6. You can click **Export** to download the report in an excel sheet.

7. Click **Cancel** to exit the screen.

6.1.0.2. Generate RSP/SP Report

In this section, you can understand how to generate a report for RSP/SP (Retail Selling Price/Selling Price).

To generate RSP/SP report, do the following:

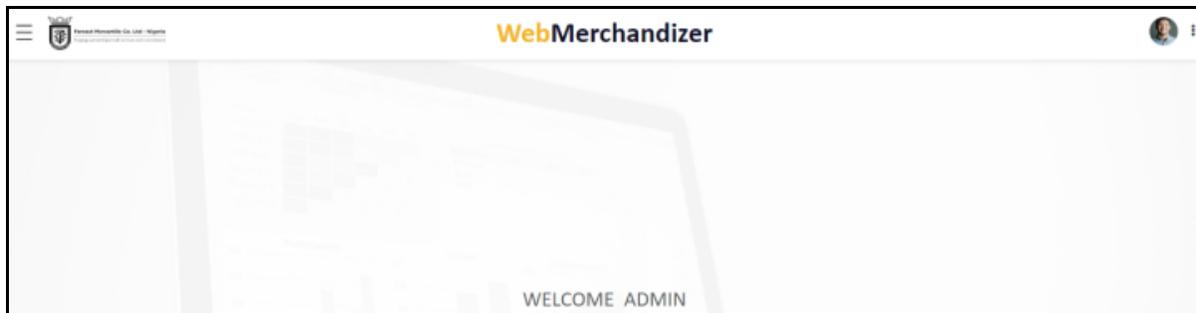1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
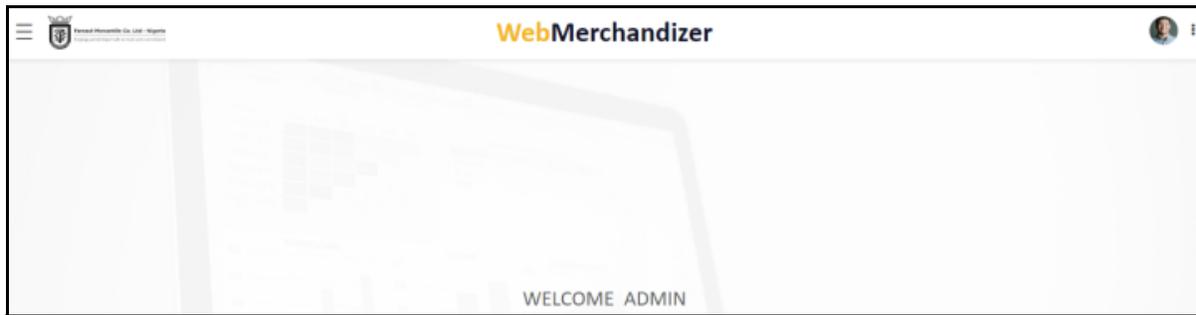
Figure 4: WebMerchandizer Welcome

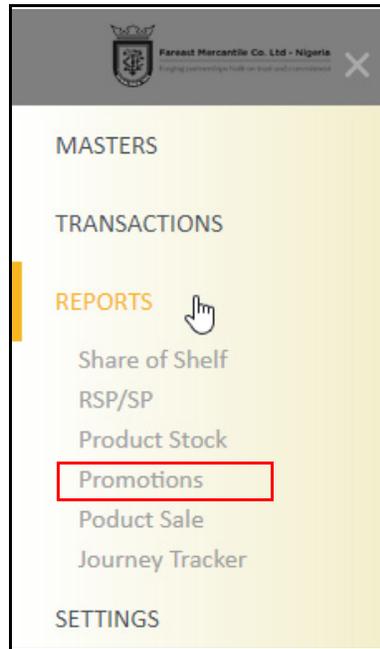2. On the screen, click [icon] [icon] icon. The menu appears as shown in the image.
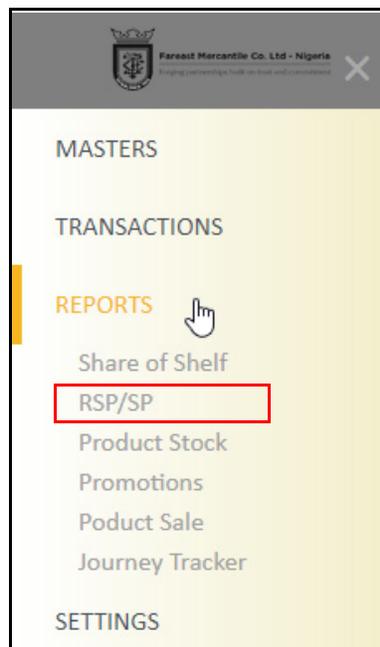
Figure 5: WebMerchandizer Menu

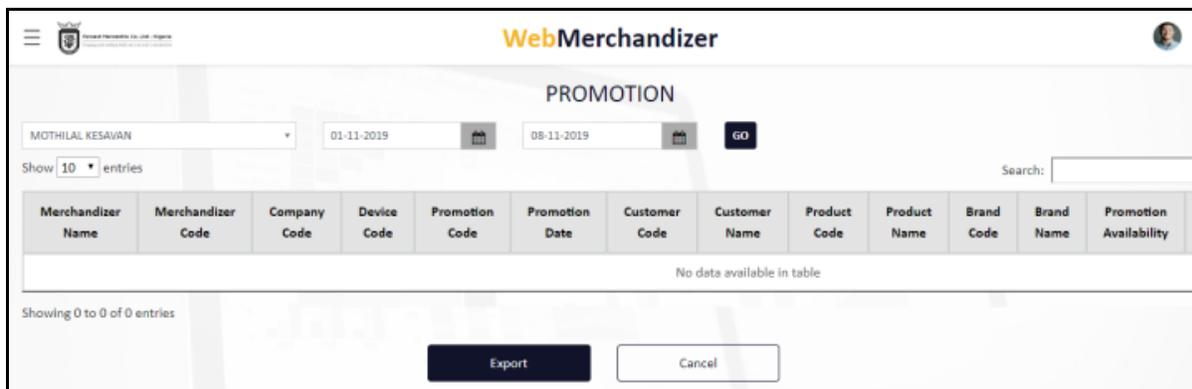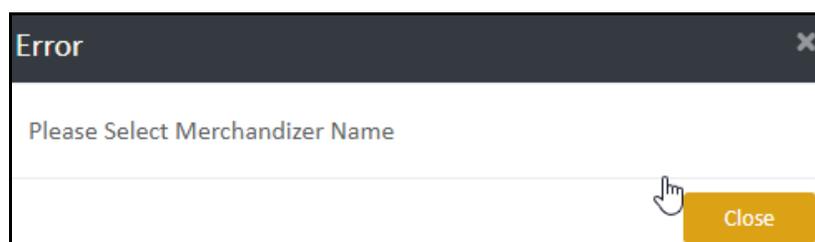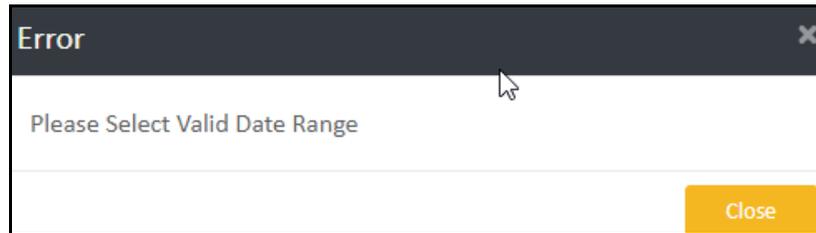3. Click **Reports > RSP/SP**. The PRICING screen appears as shown in the image.
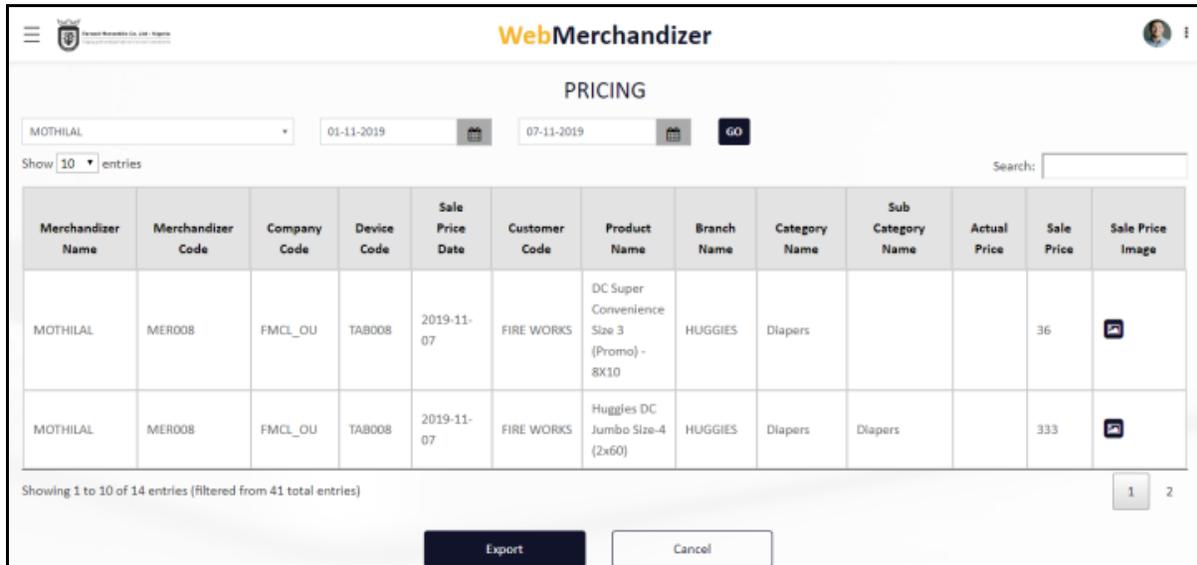
Figure 6: pricing

4. Select the merchandizer name from the drop-down list.

   ▪ If you try to fetch the report without selecting the merchandizer name. An error message appears as shown in the image.

5. Select the date using the date picker from when you want to generate the report.

6. Select the date using the date picker until which date you want to generate the report.

   ▪ If the date you select is prior to the from date, an error message appears as shown in the image.

7. Click **GO** to fetch the search result in the summary table.

8. You can click **Export** to download the report in an excel sheet.

9. Click **Cancel** to exit the screen.

6.1.0.3. Generate Product Stock Report

In this section, you can understand how to generate a report for product stock.

To generate product stock report, do the following:

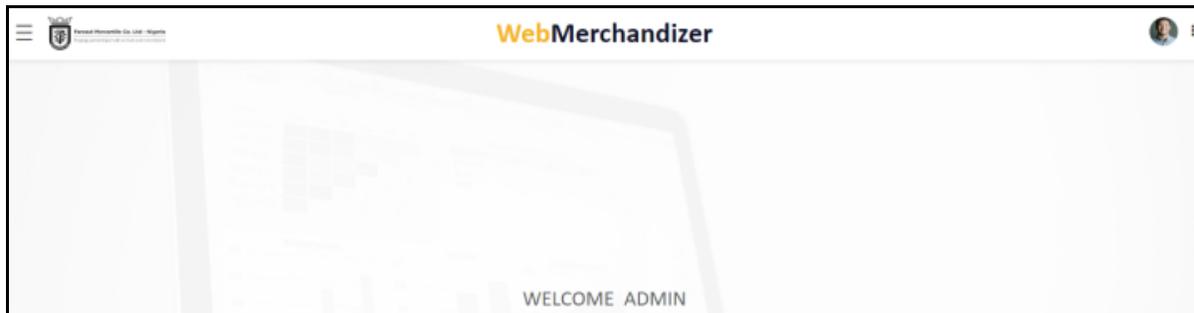1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
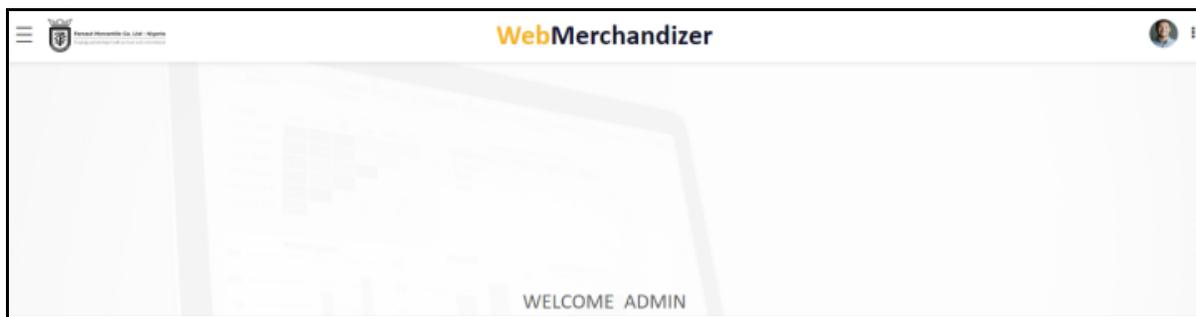
Figure 7: WebMerchandizer Welcome

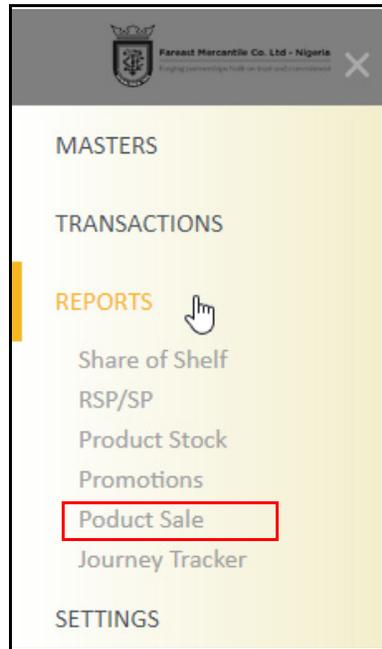2. On the screen, click [icon] icon. The menu appears as shown in the image.

Figure 8: WebMerchandizer Menu

3. Click **Reports > Product Stock**. The PRODUCT STOCK screen appears as shown in the image.
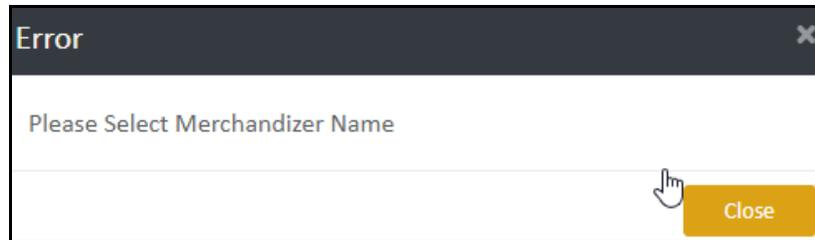

Figure 9: Product Stock

4. Select the merchandizer name from the drop-down list.

   ■ If you try to fetch the report without selecting the merchandizer name. An error message appears as shown in the image.

5. Select the date using the date picker from when you want to generate the report.

6. Select the date using the date picker until which date you want to generate the report.

■ If the date you select is prior to the from date, an error message appears as shown in the image.

7. Click **GO** to fetch the search result in the summary table.

8. You can click **Export** to download the report in an excel sheet.

9. Click **Cancel** to exit the screen.

6.1.0.4. Generate Promotion Report

In this section, you can understand how to generate a report for product promotion.

To generate product promotion report, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.

Figure 10: WebMerchandizer Welcome

2. On the screen, click   icon. The menu appears as shown in the image.

Figure 11: WebMerchandizer Menu

3. Click **Reports > Promotion**. The PROMOTION screen appears as shown in the image.

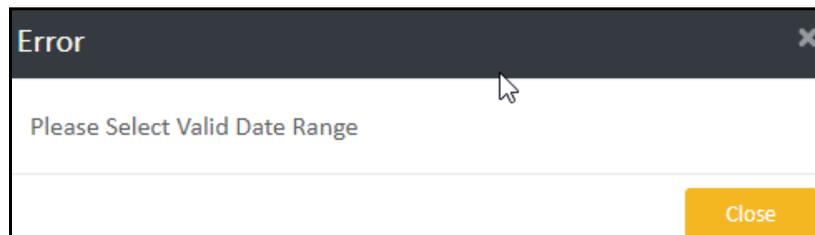
Figure 12: Promotion

4. Select the merchandizer name from the drop-down list.

   ▪ If you try to fetch the report without selecting the merchandizer name. An error message appears as shown in the image.

5. Select the date using the date picker from when you want to generate the report.

6. Select the date using the date picker until which date you want to generate the report.

    ▪ If the date you select is prior to the from date, an error message appears as shown in the image.

7. Click **GO** to fetch the search result in the summary table.

8. You can click **Export** to download the report in an excel sheet.

9. Click **Cancel** to exit the screen.

6.1.0.5. Generate Product Sale Report

In this section, you can understand how to generate a report for product sale.

To generate product sale report, do the following:

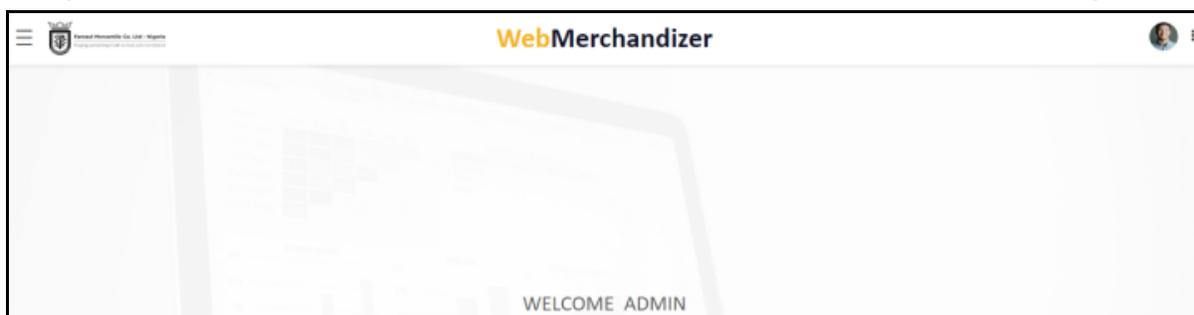1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.

Figure 13: WebMerchandizer Welcome

2. On the screen, click ⬇ 🛡 [logo] icon. The menu appears as shown in the image.

Figure 14: WebMerchandizer Menu

3. Click **Reports > Product Sale**. The PRODUCT SALE screen appears as shown in the image.

Figure 15: Promotion

4. Select the merchandizer name from the drop-down list.

- If you try to fetch the report without selecting the merchandizer name. An error message appears as shown in the image.

5. Select the date using the date picker from when you want to generate the report.

6. Select the date using the date picker until which date you want to generate the report.

- If the date you select is prior to the from date, an error message appears as shown in the image.

7. Click **GO** to fetch the search result in the summary table.

8. You can click **Export** to download the report in an excel sheet.

9. Click **Cancel** to exit the screen.

6.1.0.6. Generate Journey Tracker Report

In this section, you can understand how to generate a report for journey tracker.

To generate journey tracker report, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
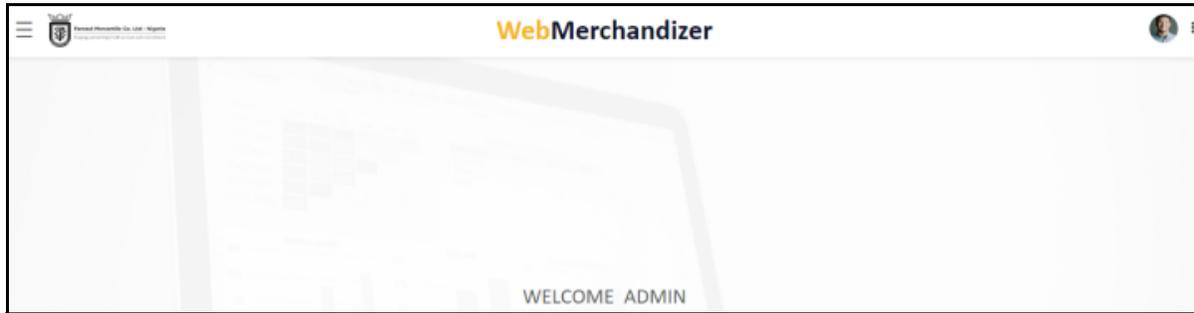

Figure 16: WebMerchandizer Welcome

2. On the screen, click [icon] [icon] icon. The menu appears as shown in the image.
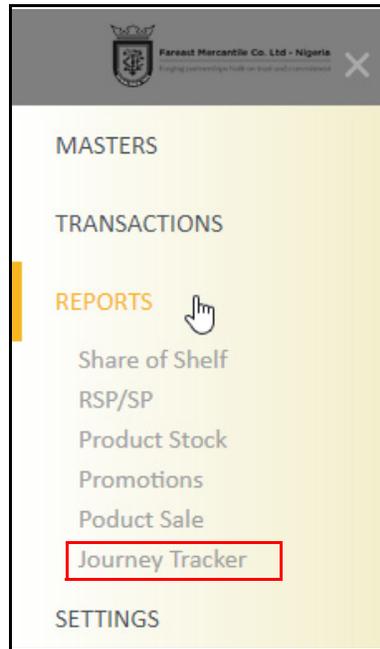
Figure 17: WebMerchandizer Menu

3. Click **Reports > Journey Tracker**. The Journey Tracker screen appears as shown in the image.
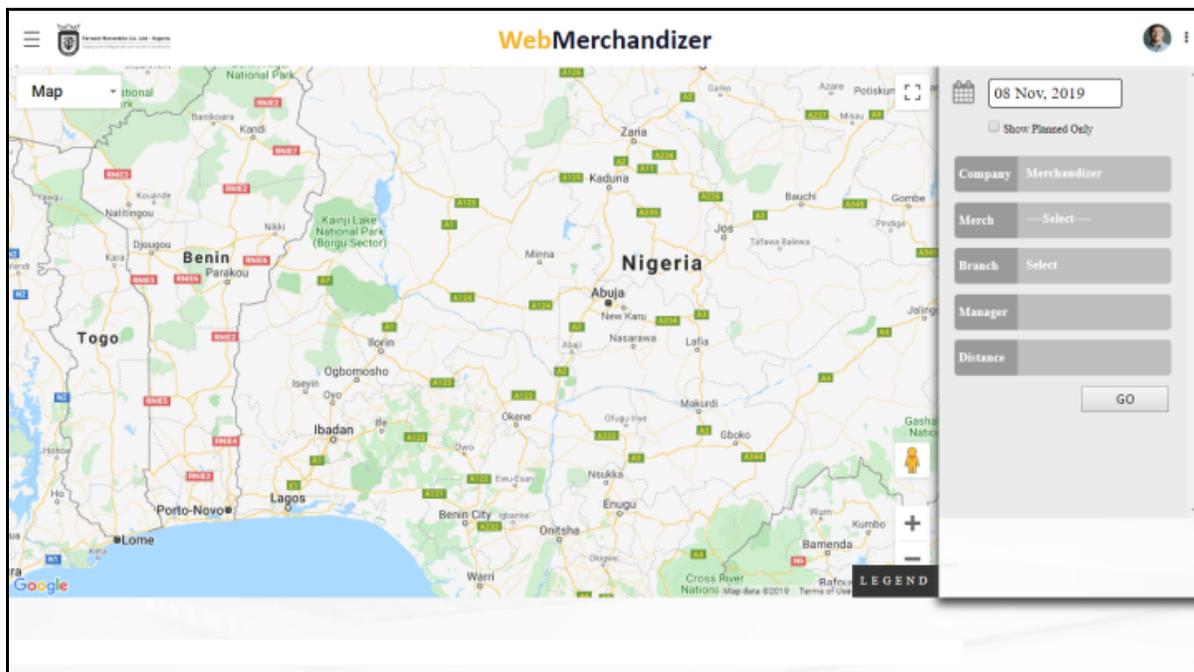
Figure 18: Journey Tracker

4. Select the company name from the **Company** drop-down list.

5. Select the merchandizer name from the **Merch** drop-down list.

6. Select the branch name from the **Branch** drop-down list.

7. Select the manager name from the **Manager** drop-down list.

8. Displays the distance travelled in the **Distance** drop-down list.

9. Click **GO** to view the journey plan in the map.

Chapter 7

7.1. Manage Settings

In this section, you can understand how to manage the user setup to use the WebSALES application. You can perform the tab setup for the BDE. You can also do general setting for WebSALES application.

The application allows you to download the master data from the ERP application and upload the same to mSales application. You can manage all the transaction related to download from ERP and Upload to mSales.

The following sections are explained in details:

Settings: You can update the general settings for the WebSALES application. For more information see *"Update Settings" on page 59*.

User Setup: You can set the user to use WebSALES application. for more information see *"Manage User Setup" on page 63*.

Tab Setup: You can perform tab setup for the BDE. For more information see *"Manage Tab Setup" on page 69*.

SendMail: You can manage the BDE notes. For more information see *"Send Mail" on page 75*

7.1.1. Update Settings

In this section, you can understand how to update the settings.

To update the settings, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.

Figure 1: WebMerchandizer Welcome

2. On the screen, click [icon] [icon] icon. The menu appears as shown in the image.
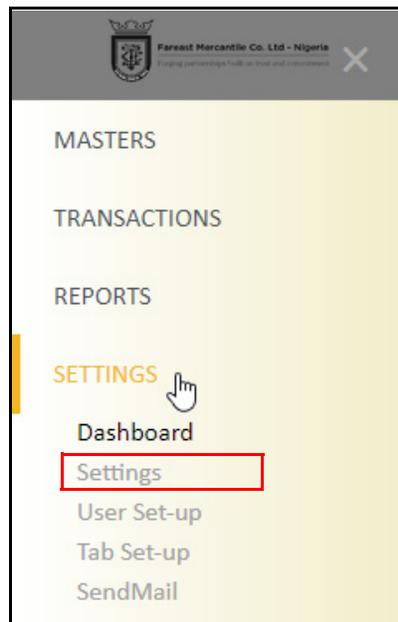
Figure 2: WebMerchandizer Menu

3. Click **SETTINGS > Settings**. The SETTINGS screen appears as shown in the image.

Figure 3: Settings

4. Enter the following details in the GENERAL region:

   ■ **Application Name**: Enter the application name as WebMerchandizer.

   ■ **Currency**: Select the currency used for the business from the drop-down list.

   ■ **Retention Days**: Enter the number of days the transaction can be viewed in the tab.

5. Enter the following details in GPS region:

   ■ **Enable GPS**: Enable Yes if you want to enable the GPS in the tab.

   ■ **GPS Start Time**: Enter the start time for the GPS to be enabled in the tab.

   ■ **GPS End Time**: Enter the end time for the GPS.

   > The GPS will be enables only within the start and end time.

   ■ **Data Transfer Frequency Maximum**: Enter the frequency in mins for the data transfer.

- **GPS Transfer Frequency**: Enter the frequency in mins for the GPS details transfer.

6. Enter the following details in JOURNEY PLAN region:

   - **Enable Saturday**: Enable if you want to allocate the journey plan for Saturday.

   - **Enable Sunday**: Enable if you want to allocate the journey plan for Sunday.

7. Enter the following details in COMPANY region:

   - **Name**: Enter the company name.

   - **Short Name**: Enter a short name for the company.

   - **Upload Company Logo**: Upload the company logo.

   > You can upload the company logo based on the company setup. The company logo in the application displays based on the image you upload.

8. Enter the following details in COMPANY DETAILS region:

   - **Contact Person**: Enter the contact person name from the company.

   - **Email**: Enter the Email ID of the contact person.

   - **Phone Number**: Enter the phone number of the contact person.

   - **Support Email**: Enter the support email ID for the application.

   - **Address1**: Enter the first line address of the company.

   - **Address2**: Enter the second line address of the company.

   - **Address3**: Enter the third line address of the company.

   - **Message**: Enter a message

9. Enter the following details in TRANSFER region:

   - **Days Image Clear:** Displays the number of days after when the image can be cleared from the tab.

   - **Days Transaction data**: Displays the number of days after when the transaction can be cleared from the tab.

   - **Days Clear DataBase**: Displays the number of days after when the database can be cleared from the tab.

   - **Gps Capture Frequency**: Displays the number of frequency for the GRS.

10. Enter the following details in MANDATORY region:

   - **Check in Image**: Select Yes, if you want to make the check in as Mandatory.

- **Repeated Check in Image**: Select Yes, if you want to make the repeat check in as Mandatory.

11. Click **SAVE**. A confirmation message appears as shown in the image.
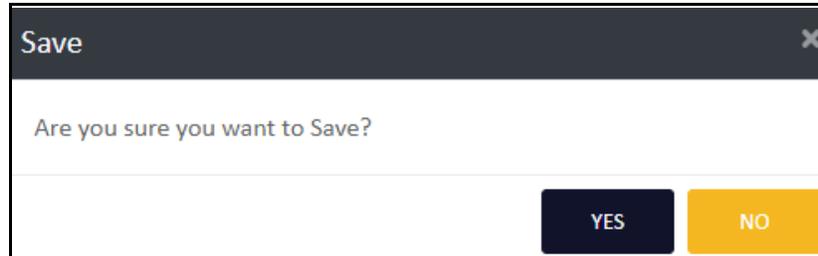
Figure 4: Confirmation to Save the Product details

12. Click **YES** to save the product details.

- If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.
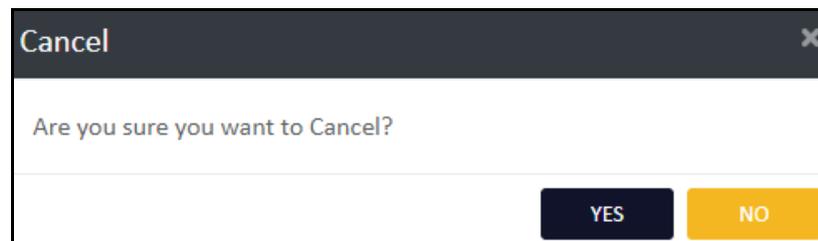
Figure 5: Confirmation to cancel the product update
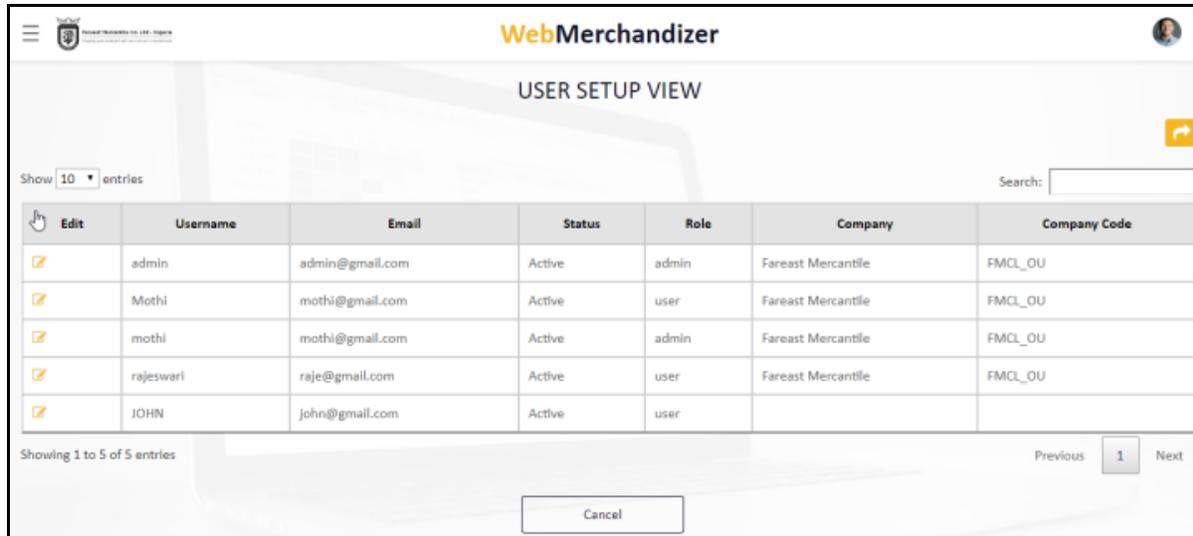
- Click **YES** to cancel the update

7.1.2. Manage User Setup

In this section, you can understand how to manage the user setup. You can create a user and assign user privileges to the user to access the application.

The following are the section explained in details:

- *"Create User" on page 63*

- *"View User List" on page 66*

- *"Edit User Details" on page 67*

7.1.2.1. Create User

In this section, you can understand how to create user to perform the task in WebMerchandizer application. Before creating a user, you need to know what rights you can give the user to use the application.

To create the user, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
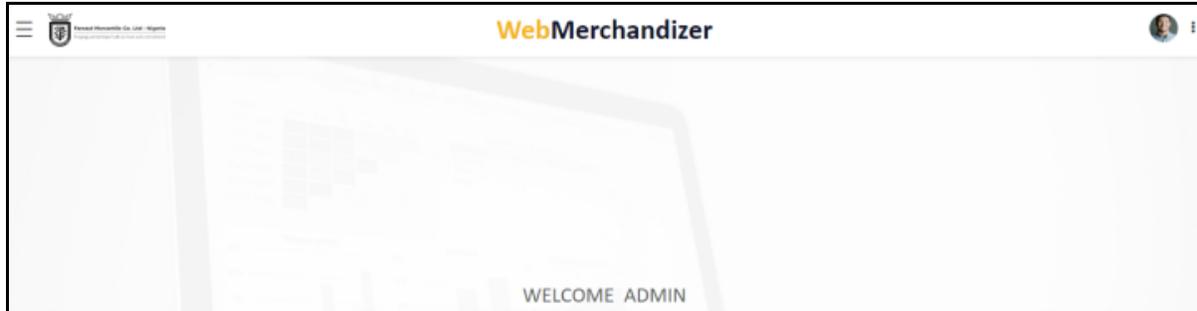
Figure 6: WebMerchandizer_Welcome

2. On the screen, click ⬚ ⬚ icon. The menu appears as shown in the image.
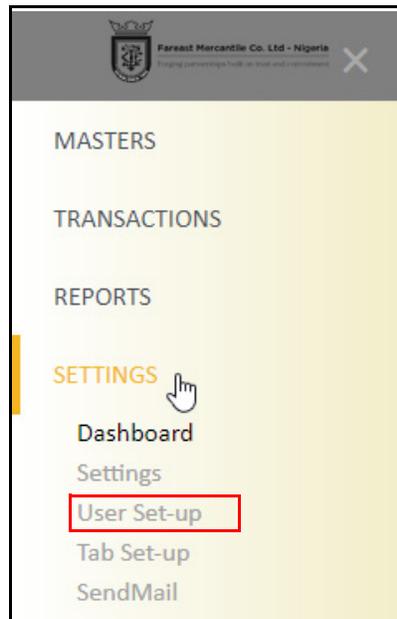
Figure 7: WebSALES Menu

3. Click **Settings > User Setup**. The USER SET-UP screen appears as shown in the image.

Figure 8: User Set-Up

4. Enter the name of the user in the **User Name** text box.

5. Enter the user email ID in the **Email ID** text box.

6. Enter the user mobile number in the **Mobile No** text box.

7. Enter a password to use for Login to the WebSALES application in the **Password** text box.

8. Re-enter the password to confirm in the **Confirm Password** text box.

9. Select the status of the user from the **Status** drop-down list.

10. Select the user role in the organization from the **Role** drop-down list.

11. The company name auto populates in the **Company** text box.

12. You can assign the access rights to the modules in WebSALES application in the **ACCESS RIGHTS** region for the following modules:

- **Masters**: You can assign privileges to the user to create or view the masters screen based on the role.

- **Transactions**: You can assign privileges to the user to create or view the transaction screen based on the role.

- **Reports**: You can assign privileges to the user to view the Employee activity screen based on the role.

13. Click **SAVE**. A confirmation message appears as shown in the image.
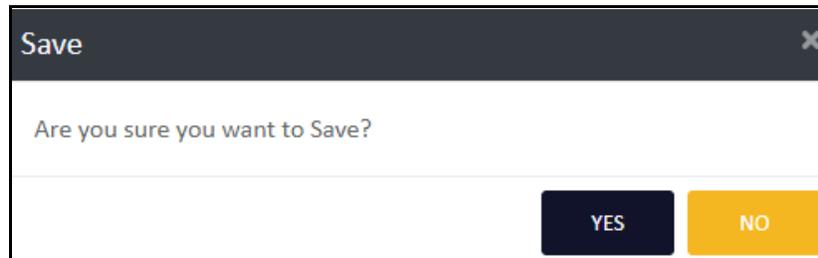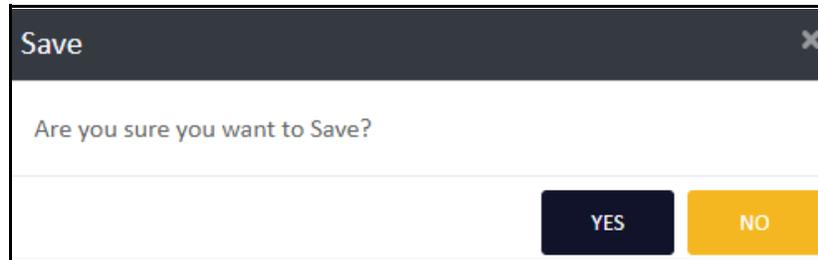

Figure 9: Confirmation to Save the Product details

14. Click **YES** to save the product details.

- If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.
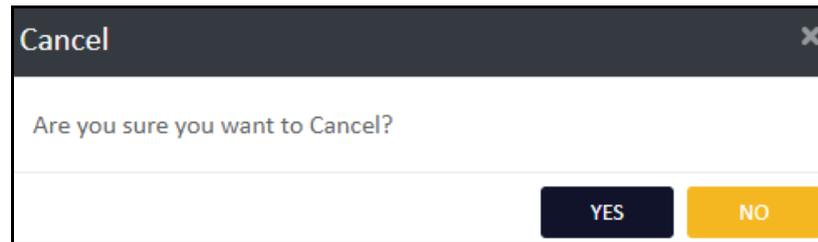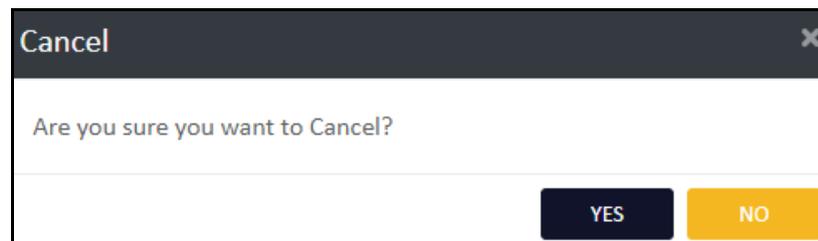

Figure 10: Confirmation to cancel the product update

- Click **YES** to cancel the update

7.1.2.2. View User List

In this section, you can understand how to view the user list.

To view the user list, do the following:

1. On the USER SET-UP screen, click [icon] icon. The USER SETUP VIEW screen appears as shown in the image.

Figure 11: User Setup

2. On the screen, you can view the following:

- [Show 10 entries] : Click the drop-down arrow to set the list of user set-up to display on the summary table.

- [Search:] : Enter the search parameter on the text box to display the search result on the summary table.

- **Edit**: Click [icon] icon to edit the user setup details.

- **User Name**: Displays the user name.

- **Email**: Displays the user Email ID

- **Role**: Displays the user role.

- **Status**: Displays the user status.

- **Company**: Displays the company name.

- **Company Code**: Displays the company code.

- [Showing 1 to 10 of 327 entries] : Displays the number of user get displayed out of total user list.

- [icon] : Click to create user.

7.1.2.3. Edit User Details

In this section, you can understand how to edit the user details.

To edit the user details, do the following:

1. On the USER SET-UP screen, click [icon] icon. The User Details screen appears as shown in the image.
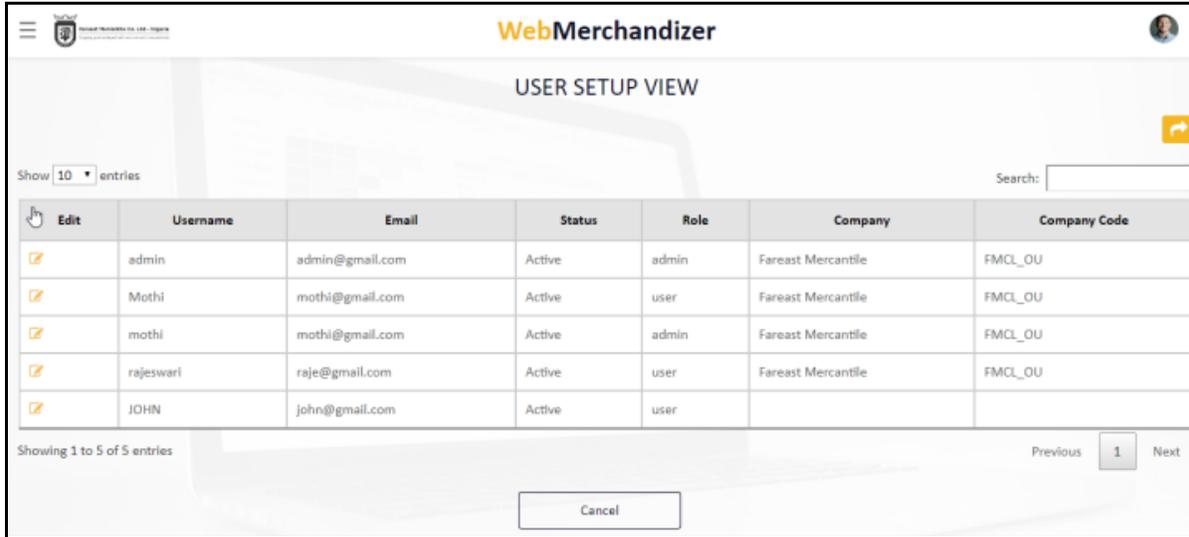
Figure 12: User Setup

2. Click [icon] icon. The USER SET-UP screen appears as shown in the image.
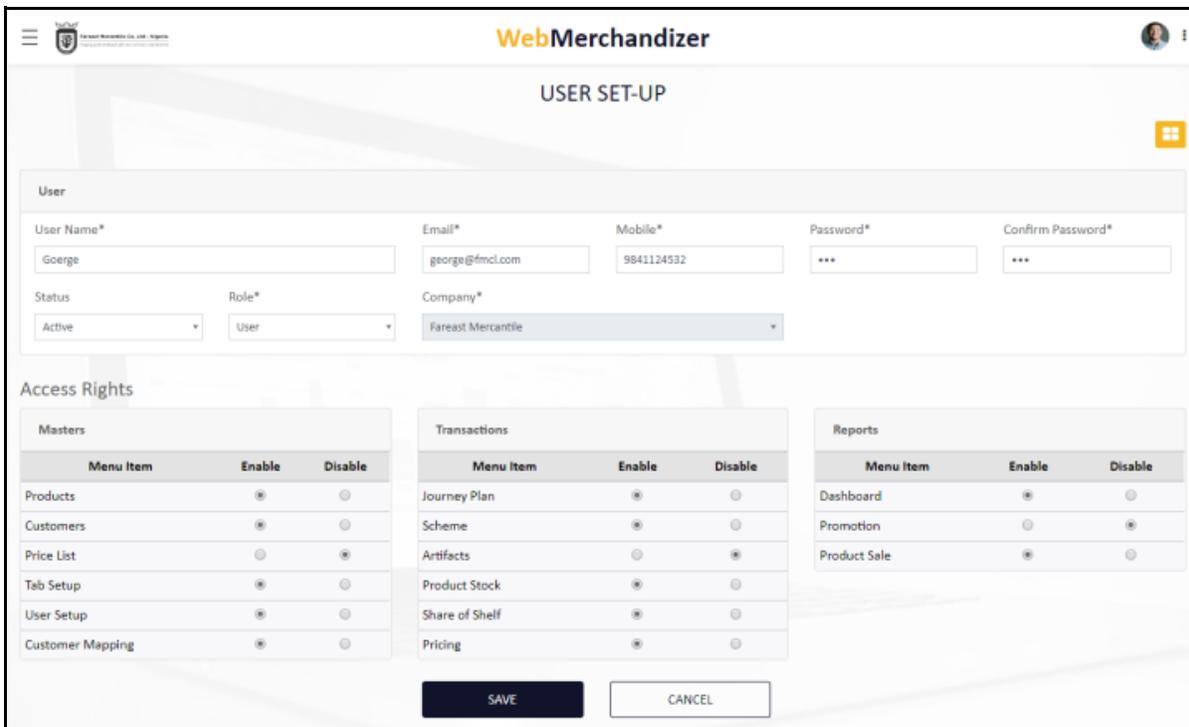
Figure 13: User Set-Up

3. Modify the fields you want.
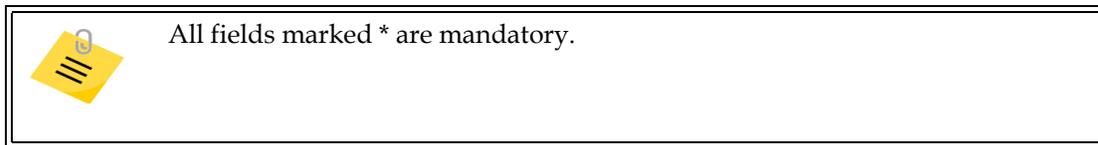
> All fields marked * are mandatory.

4. Click **SAVE**. A confirmation message appears as shown in the image.
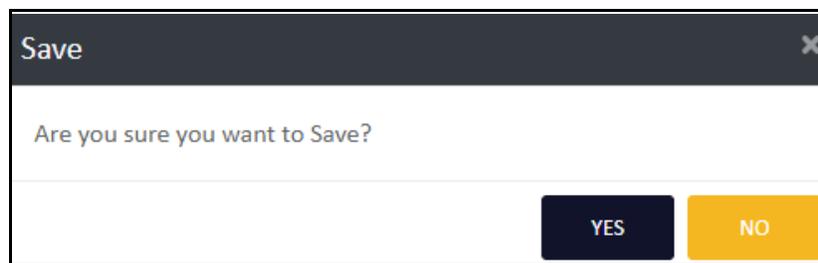

Figure 14: Confirmation to Save

5. Click **YES** to save the product details.

- If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.

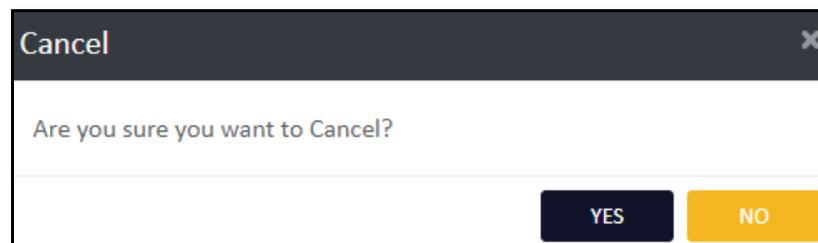**Figure 15: Confirmation to cancel**

- Click **YES** to cancel the update

7.1.3. Manage Tab Setup

In this section, you can understand how to manage the tab setup for the Merchandizer.

The following sections are explained in detail:

-

7.1.3.1. Create Tab to Merchandizer

In this section, you can understand how to assign the tab to the Merchandizer.

To assign tab, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
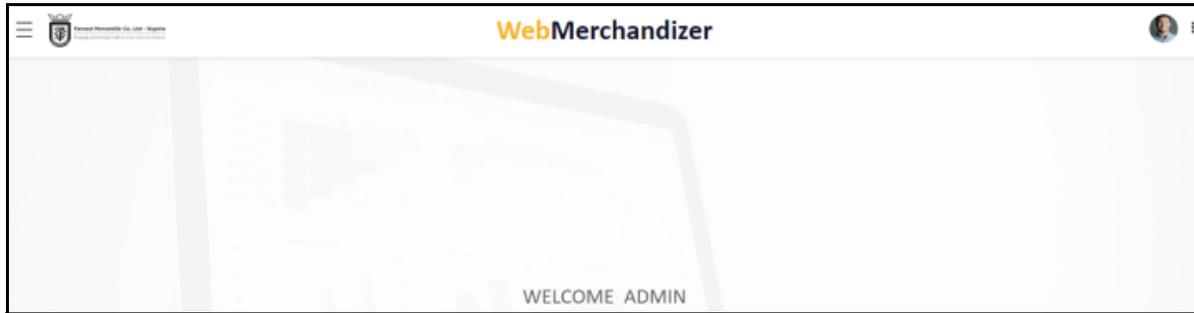
Figure 16: WebMerchandizerWelcome

2. On the screen, click icon. The menu appears as shown in the image.
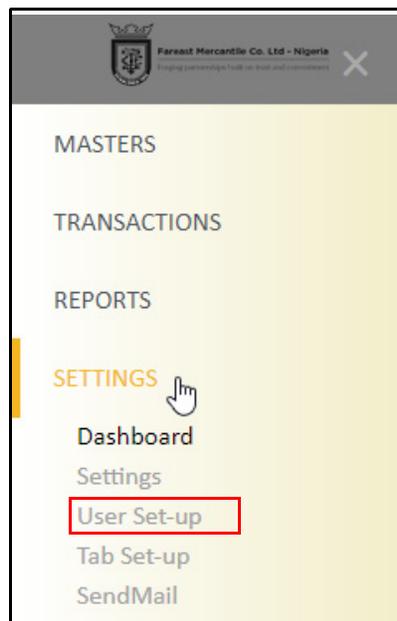
Figure 17: WebSALES Menu

3. Click **SETTINGS > Tab Setup**. The TAB SET-UP screen appears as shown in the image.

Figure 18: Tab Set-Up

4. Enter the name in the **Name** text box.

5. System auto populates the code in the **Code** text box.

6. Enter the mobile number in the **Mobile** text box.

7. Enter the Email ID in the **Email** text box.

8. Enter the designation in the **Designation** text box.

9. Enter the name of the person to whom the merchandizer has to report in the **Reporting To** text box.

10. System auto populates the company name in the **Company** drop-down list.

11. Enter the following information in the Tab Details region:

   ■ **Code**: System auto-populates the code.

   ■ **IMIE Number**: Enter the tab IMIE number.

   ■ **SIM Number**: Enter the SIM number used in the tab.

   ■ **Allocation Date**: System auto-populates the current date.

   ■ **Tab Sequence Prefix**: System auto-populates the tab sequence number.

   ■ **Download to Tab**: Select yes if you want the user to download the master data in the tab.

- **Status**: Select the status for the tab from the drop-down list.

12. Enter the following details in the Tab Login Details region:

   - **Tab user Name**: Enter a user name for the tab.

   - **Tab Password**: Enter a password for the tab.

   - **Tab Confirm Password**: Enter the password again to confirm.

13. Enable the radio button corresponding to the module to which you want to assign right to the user in the User Right region.

14. Click **SAVE**. A confirmation message appears as shown in the image.

Figure 19: Confirmation to Save

15. Click **YES** to save the product details.

   - If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.

Figure 20: Confirmation to cancel
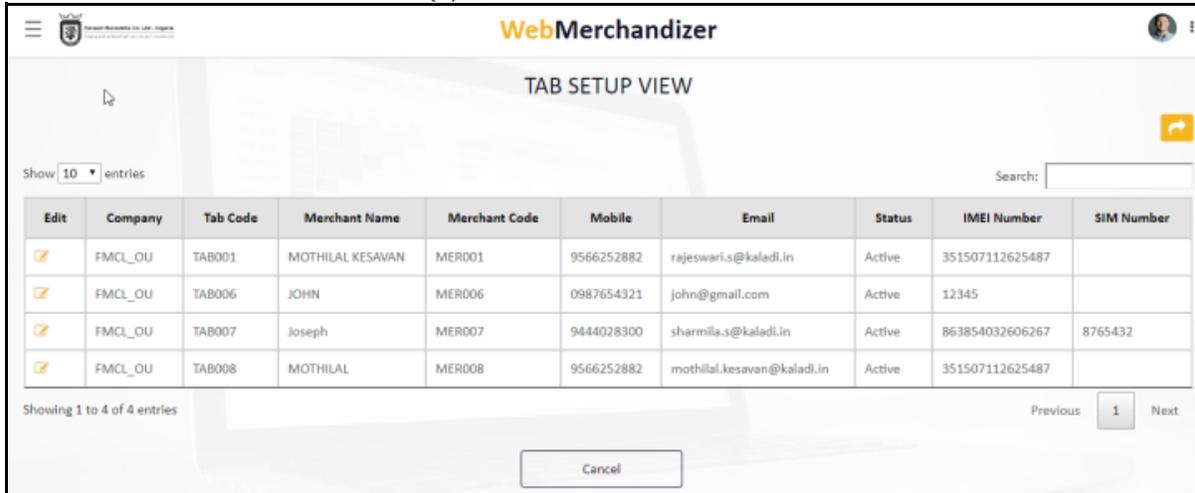
   - Click **YES** to cancel the update

7.1.3.2. View Tab Details

In this section, you can understand how to view the tab details.

To view the tab details, do the following:

1. On the TAB SET-UP screen, click ⊞ icon. The TAB DETAILS screen appears as shown in the image.
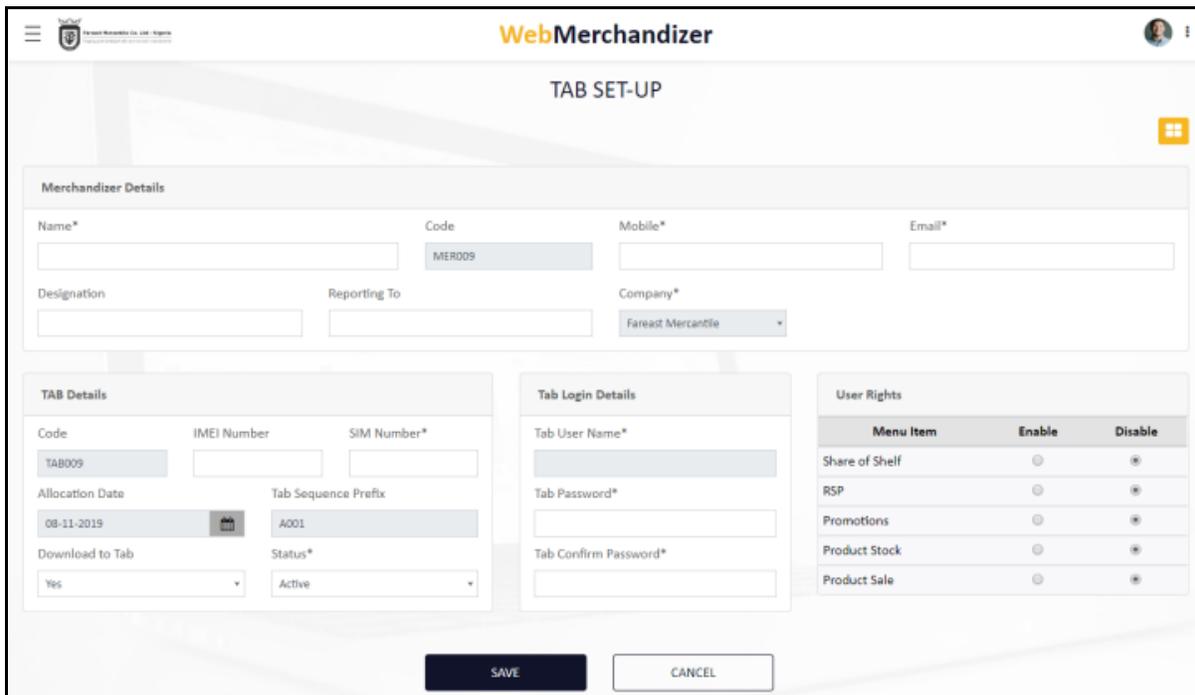

Figure 21: Tab Set-Up Details

2. On the screen, you can view the following:

■ Show `10 ▼` entries : Click the drop-down arrow to set the list of tab to display on the summary table.

■ Search: [   ] : Enter the search parameter on the text box to display the search result on the summary table.

■ **Edit**: Click 📝 icon to edit the Tab details.

■ **Company**: Displays the company name.

■ **Tab Code**: Displays the unique identification number for the tab.

■ **Merchandizer Name**: Displays the name of the BDE.

■ **Merchandizer Code**: Displays the unique identification number for the BDE.

■ **Mobile**: Displays the mobile number.

■ **Email**: Displays the email ID.

■ **Status**: Displays the tab status.

■ **IMEI Number**: Displays the IMEI number of the tab.

■ **SIM Number**: Displays the SIM number used in the tab.

■ Showing 1 to 10 of 327 entries : Displays the number of tab get displayed out of total tab list.

■ ➦ : Click to update tab set-up.

7.1.3.3. Edit Tab Details

In this section, you can understand how to edit the tab details.

To edit the tab details, do the following:

1. On the TAB SET-UP screen, click [icon] icon. The TAB DETAILS screen appears as shown in the image.

Figure 22: Tab Set-Up Details

2. Click [icon] icon. The TAB SET-UP screen appears as shown in the image.

Figure 23: Tab Set-Up

3. Modify the editable field if you want.

4. Click **SAVE**. A confirmation message appears as shown in the image.
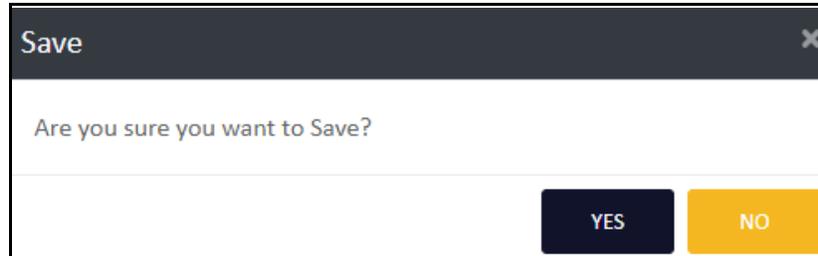

Figure 24: Confirmation to Save

5. Click **YES** to save the product details.

- If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.
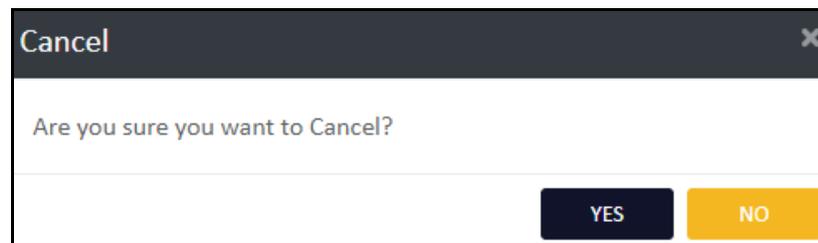

Figure 25: Confirmation to cancel

- Click **YES** to cancel the update

7.1.4. Send Mail

In this section, you can understand how to send a mail through WebMerchandizer. You can view all the merchandizer name who are all mapped with the customers. The system sends the mail with URL and the login credentials.

To send mail, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
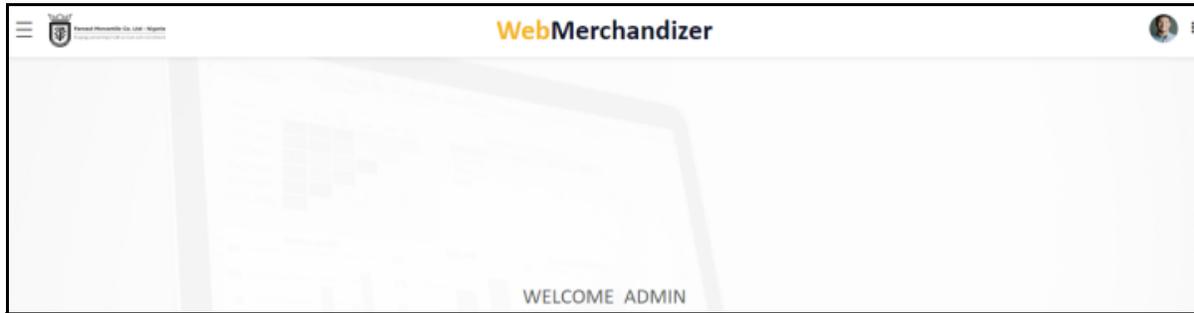

Figure 26: WebMerchandizer Welcome

2. On the screen, click ⬇ 🛡 icon. The menu appears as shown in the image.
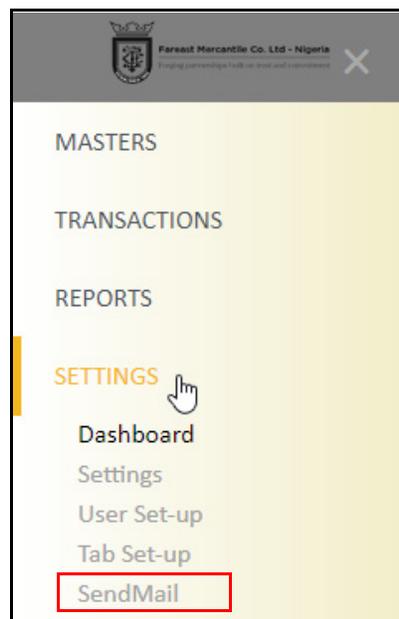

Figure 27: WebMerchandizer Menu

3. Click **SendMail**. The SENDMAIL screen appears as shown in the image.
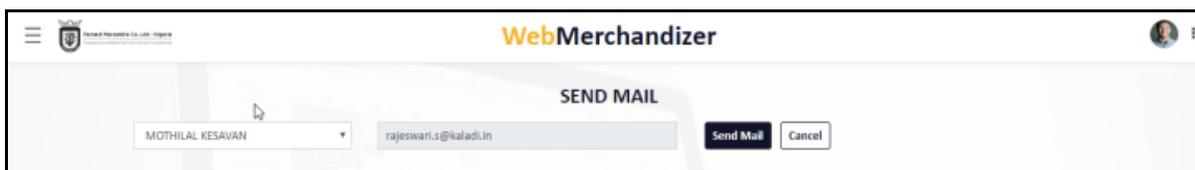

Figure 28: Send Mail

4. Select the Merchandizer name from the drop-down list.

5. System auto-populates the e-mail ID of the merchandizer.

6. Click **SendMail** to send the mail to the registered mail ID with the URL and the credentials.

> If you do not map the customer to the merchandizer, you cannot send a mail to the merchandizer to install the mMerchandizer application.

■ If you want to exit the screen, click **Cancel**.

Chapter 8

8.1. Logout of WebMerchandizer

In this section, you can understand how to log out of WebMerchandizer application.

To log out of WebMerchandizer, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.
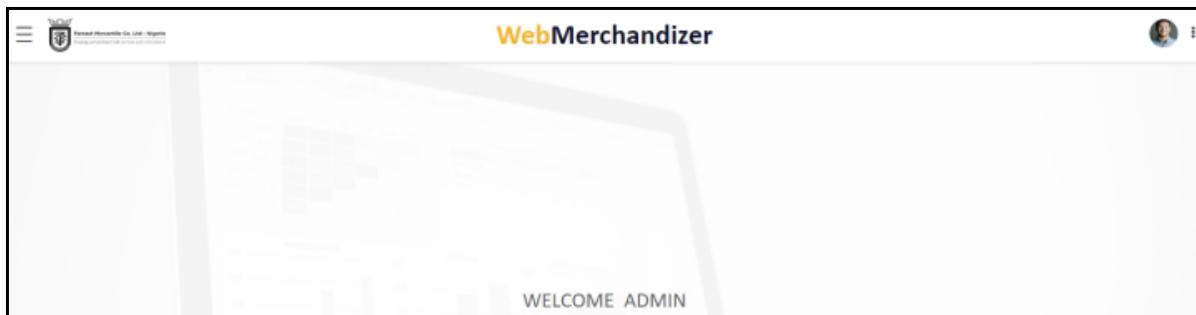

Figure 1: WebMerchandizer Welcome

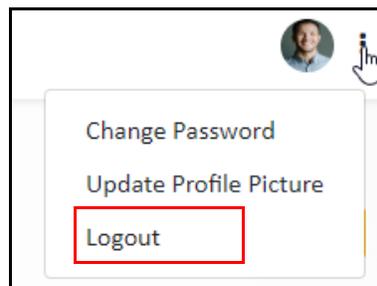2. Click ⋮ icon on the top right corner of the screen. The menu appears as shown in the image

Figure 2: Logout

3. Click **Logout** to exit the application.

Chapter 9

9.1. Update Profile Photo

In this section, you can understand how to update the profile photo.

To update the profile photo, do the following:

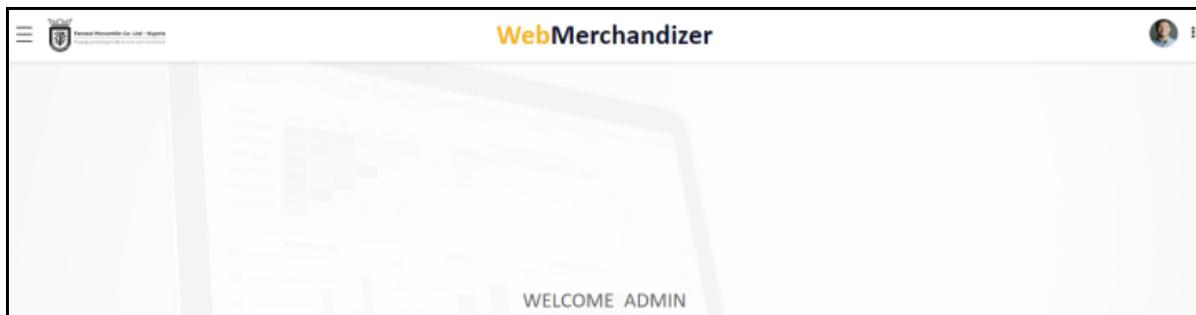1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.

Figure 1: WebMerchandizer Welcome

2. Click ⋮ icon on the top right corner of the screen. The menu appears as shown in the image
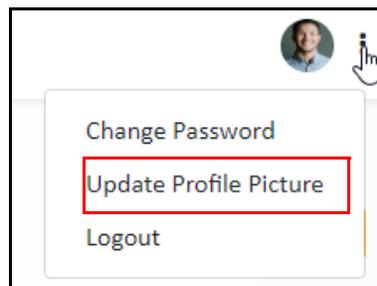

Figure 2: Logout

3. Click **Update Profile Picture**. The Profile Settings screen appears as shown in the image.
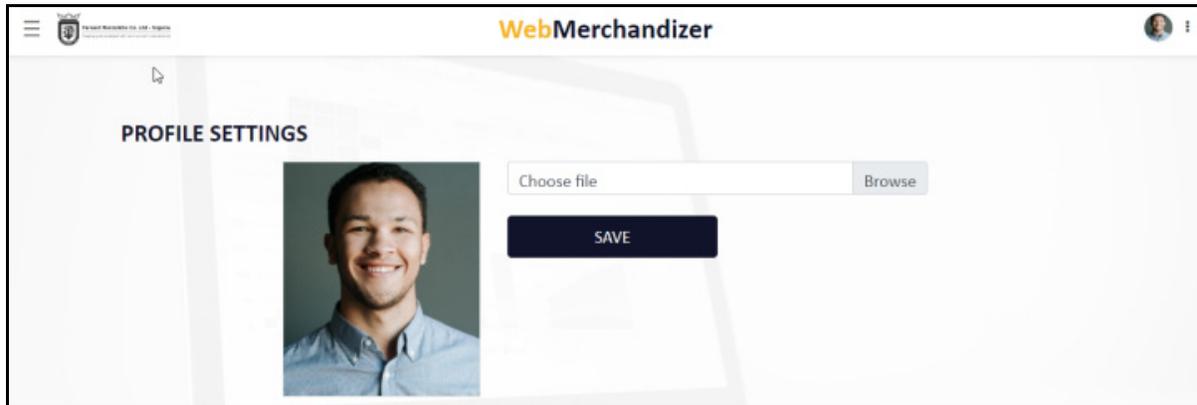

Figure 3: Profile Settings

4. Browse and select the photo to update the profile picture.
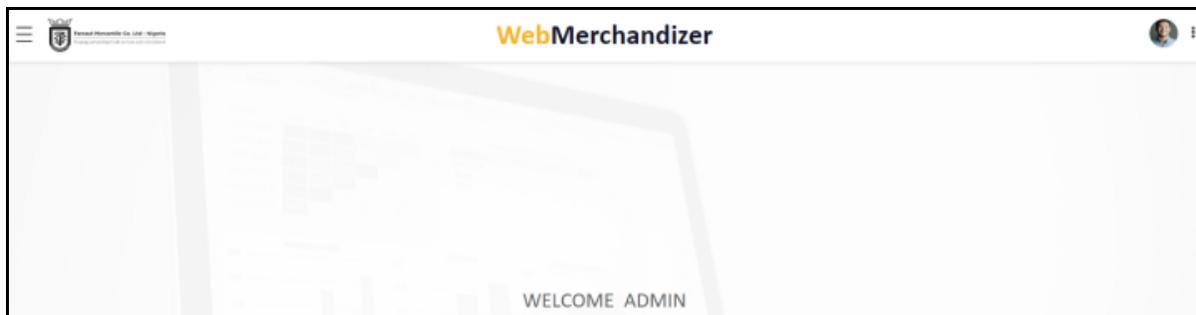
5. Click **SAVE** to save the changes.

Chapter 10

10.1. Change Password

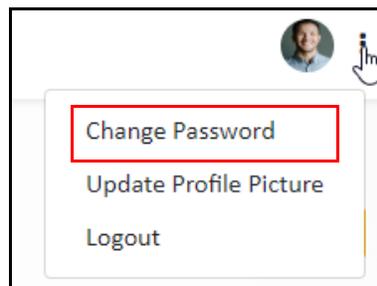In this section, you can understand how to change the password.

To change the password, do the following:

1. Login to WebMerchandizer application. The Welcome screen appears as shown in the image.

Figure 1: WebMerchandizer Welcome

2. Click ⋮ icon on the top right corner of the screen. The menu appears as shown in the image

Figure 2: Logout

3. Click **Change Password**. The CHANGE PASSWORD screen appears as shown in the image.
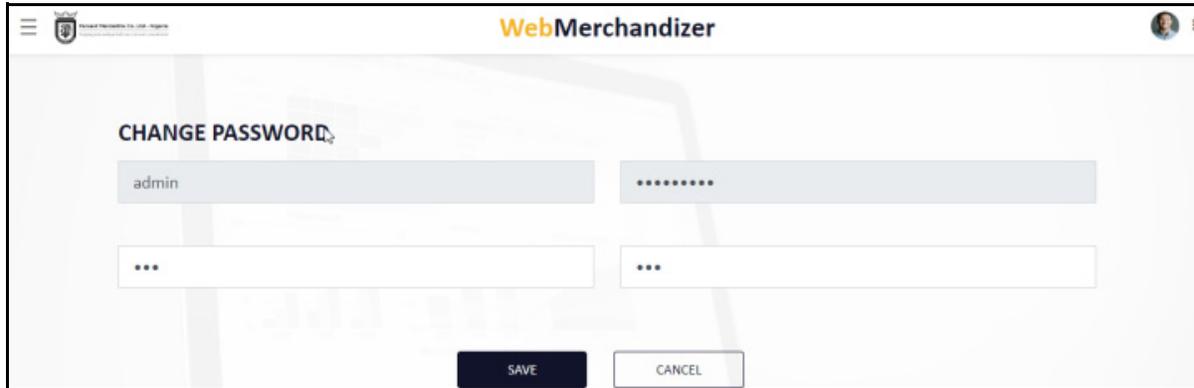

Figure 3: Change Password

4. System auto populates the old user name and password.

5. Enter the new password and re-enter the password to confirm.

6. Click **SAVE**. A confirmation message appears as shown in the image.
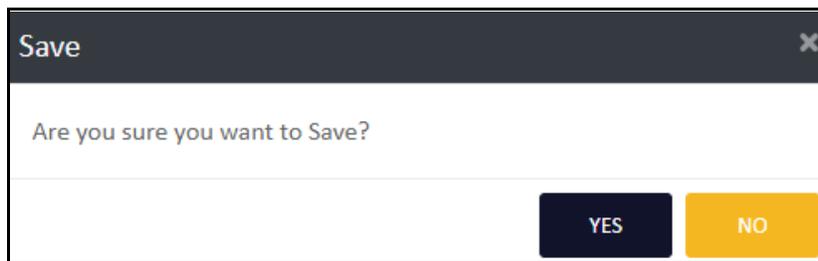

Figure 4: Confirmation to Save

7. Click **YES** to save the product details.

   ▪ If you want to exit without saving the details, click **CANCEL**. A confirmation message appears as shown in the image.
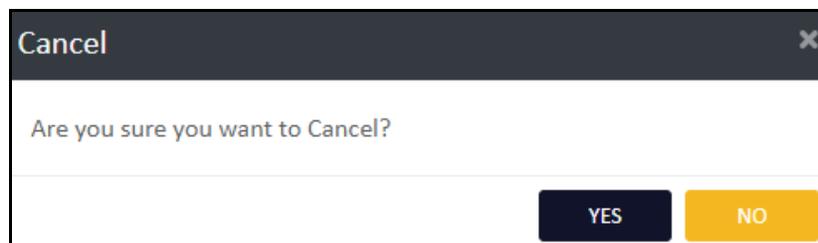

Figure 5: Confirmation to cancel

   ▪ Click **YES** to cancel the update.

Chapter 11

11.1. Admin Rights

In this section, you can understand how to assign the access rights to the merchandizer.

To assign right to merchandizer, do the following:

1. Login to the WebMerchandizer.

2. Perform Tab setup.

    ▪ Create merchandizer for the tab

    ▪ Set user name and password for the Merchandizer

3. Map the customer for the merchandizer.

4. Send mail with the URL and the login credentials to the merchandizer.

> Only if the customer is mapped for the merchandizer, you can send mail.