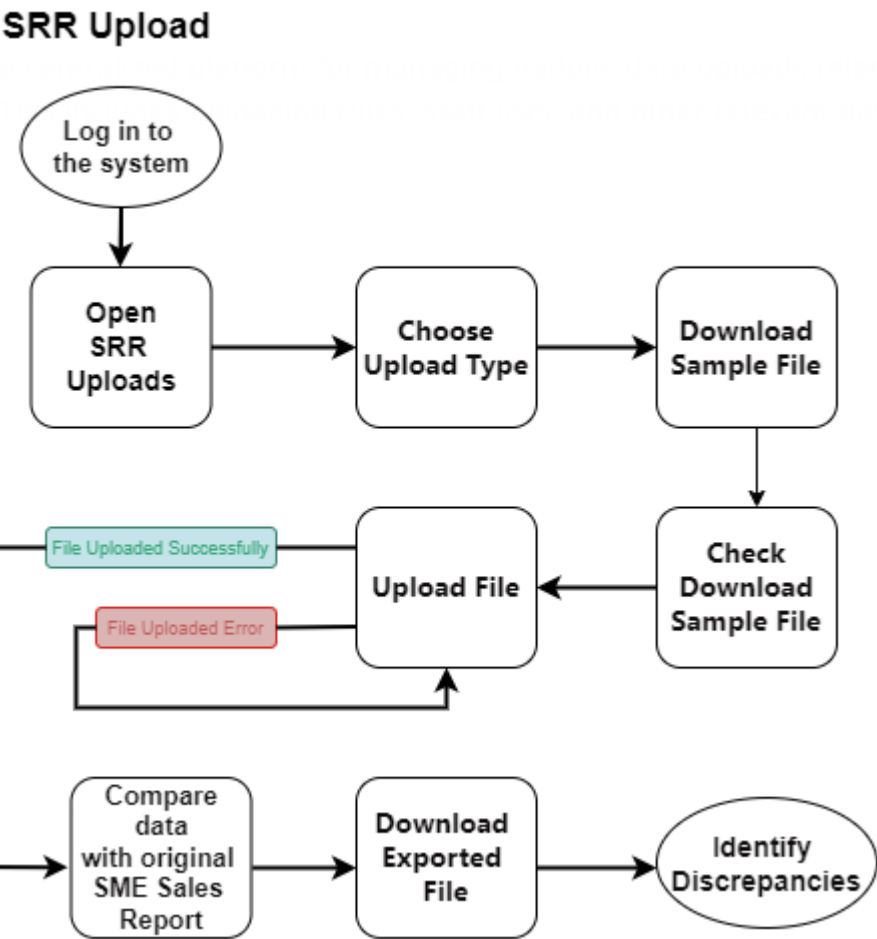


SRR Uploads

SRR Uploads

Overview

The SRR Uploads feature provides access to the Sales Report (SRR) module.



SRR Upload

Account

Dashboard > Account

GENERAL SECURITY

Profile

Staff No: 55555

First Name: Lanka

Last Name: Sena

Email Address *: demo.crm@lalco.la

Phone Number: 2023654894

Nickname: Staff-lan

Department: [Dropdown]

Steps

- Navigate to the Uploads Page**
 - Log in to the system and navigate to the "Dashboard" section.
 - Click on the "SRR" tab.
 - Select the "Upload" option.
- Choose Upload Type**
 - Select the specific upload type you want to perform (e.g., Rule, Staff List, Bulk Data).
- Download Sample File (Optional)**
 - If available, download a sample file to guide you in preparing your data.
- Check the Downloaded Sample File**
 - Check the Downloaded Sample Data is in the correct format and structure, in the sample file Against the Original SME Sales Report to Identify Discrepancies or Errors
- Upload the File**
 - Click the "Choose File" button and select the downloaded sample data file.
 - Click the "Upload" button to initiate the upload process.

Upload Rule

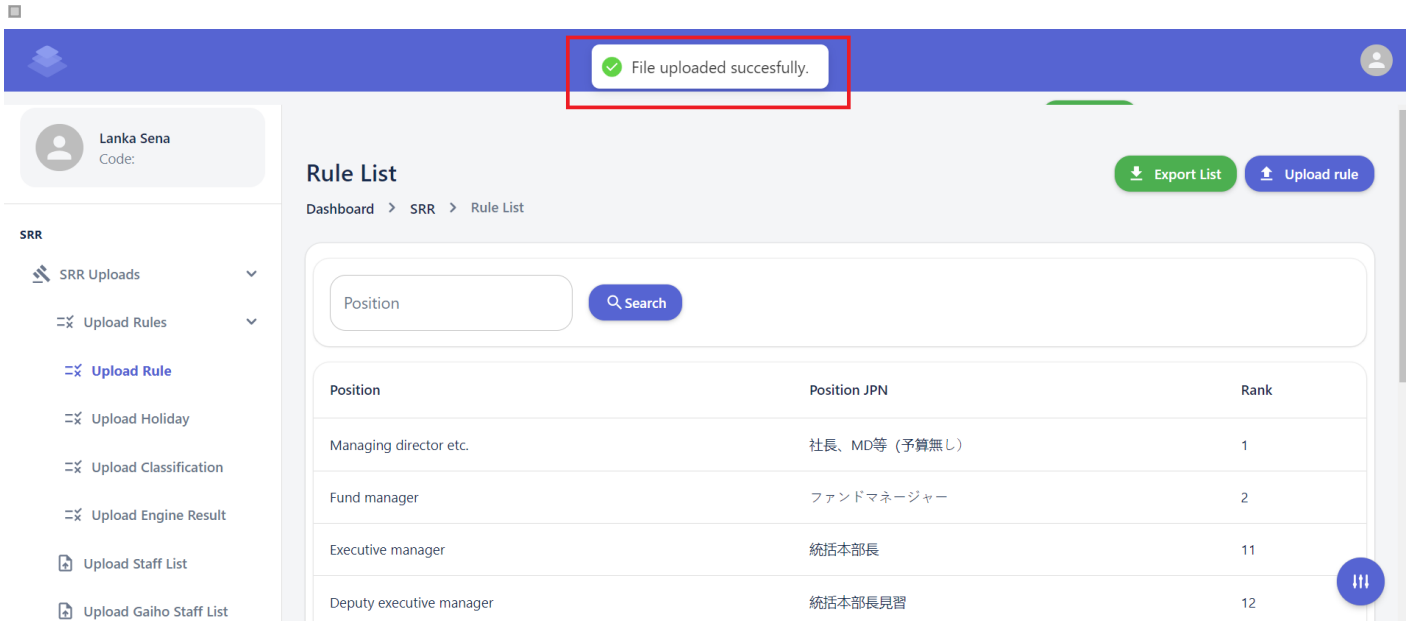
Dashboard > SRR > Upload > Rule

[Download sample file](#)

[Choose File](#) No file chosen [Upload](#)

6. Verify and Process

- The system will process the uploaded data and display a confirmation message.
"File Upload Successfully"
- Review the message for any errors or warnings.
- If there are no errors, the uploaded data will be successfully processed.



- **Locate the "Export List" Button:**

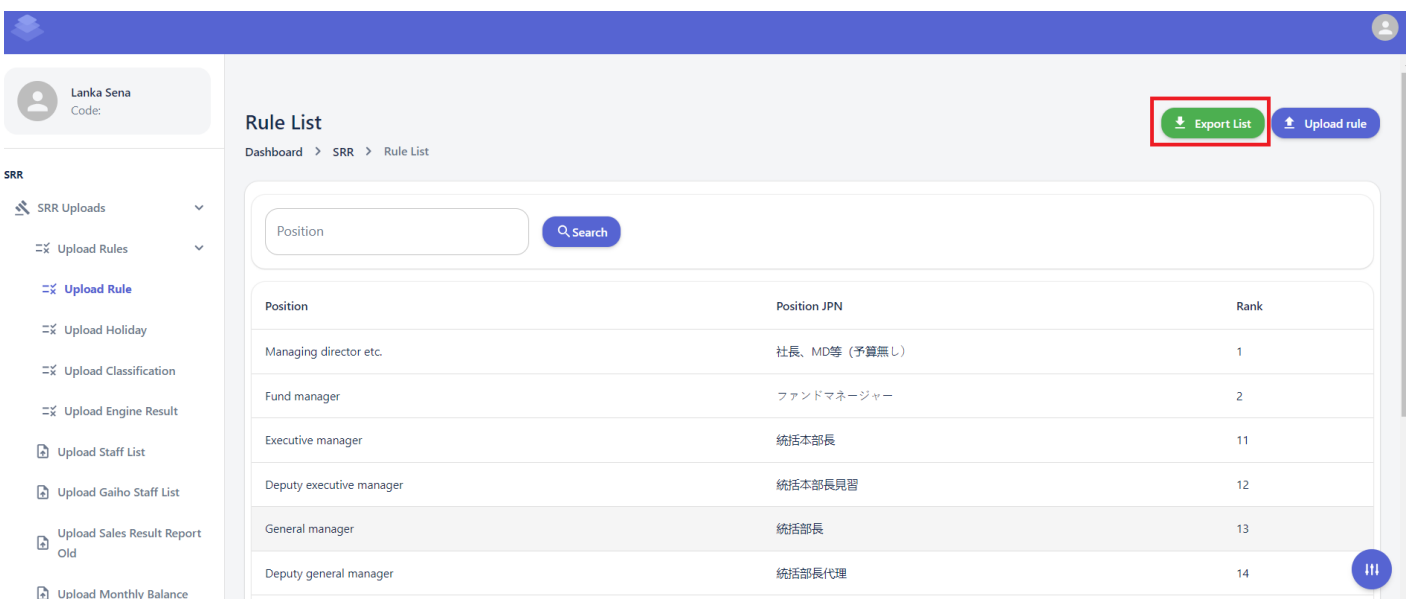
- Look for the "Export List" button at the top right corner of the Rule List page.

- **Click the "Export List" Button:**

- Click the "Export List" button to initiate the export process.

- **Download the Exported File:**

- The system will generate a downloadable file containing the list of rules.
- Choose a suitable location to save the file on your device.

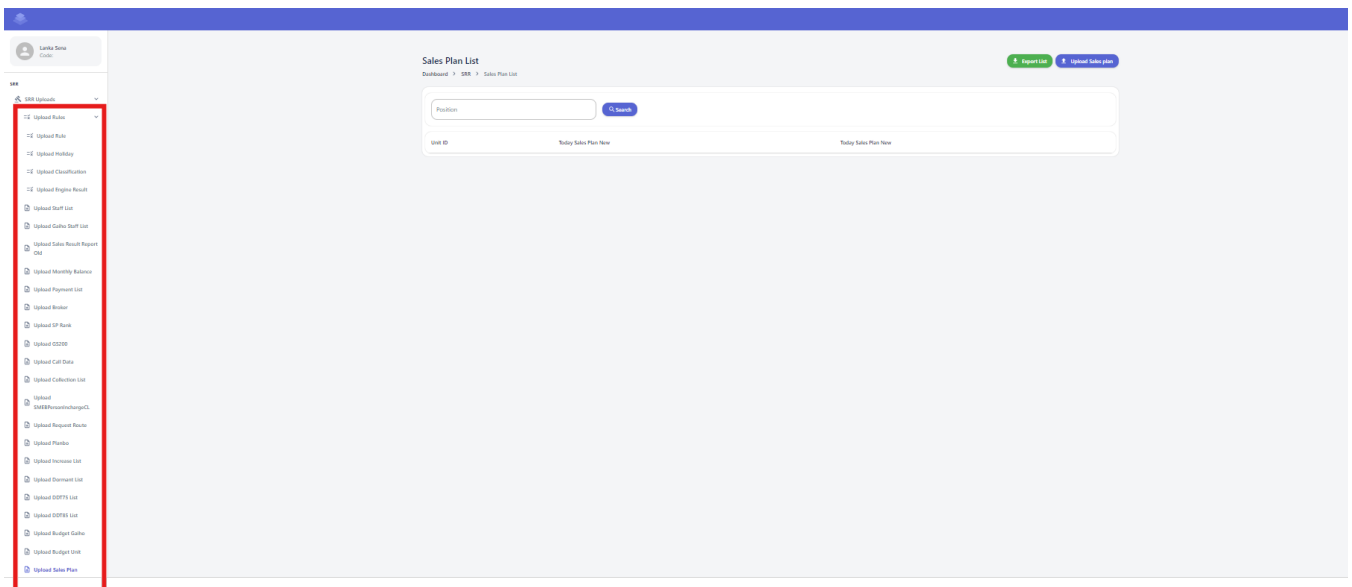


- **Only the raw data from the uploaded sample sheet is included. When you export the data, the values in the formula columns will be automatically calculated.**

- **Check Export Sheets Against the Original SME Sales Report to Identify Discrepancies or Errors**

Check below all sheet according to the above steps

- Rule
- Staff
- Gaiho staff
- Sales result report old
- Monthly balance
- Payment List
- Broker
- SP Rank
- GS200
- Call Data
- Collection List
- SMEBPersonInCharge
- Request Route
- PlanBo
- Increase List
- Dormant List
- DDT75 List
- DDT85 List
- Budget Unit
- Budget Gaiho



Revision #8

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