Trade Portal

SM Trade Portal User Manual
for Vendor User

Food Retail Group

Final Version 1.0

2012

CONTENTS

PREFACE

Purpose

This user manual aims to guide you in using the different application modules of SM Trade Portal for Food Retail Group.

Intended Audience

This document is intended for Vendor Users use only.

1 INTRODUCTION

1.1. SYSTEM REQUIREMENTS

Minimum Hardware Requirements
- Pentium 4 3.0Ghz
- 1GB RAM
- Windows XP SP2

Minimum Requirement for Web Browser Version Installed
- Google Chrome (any version)
- Microsoft Internet Explorer 7
- Opera (any version)
- Safari (any version)
- Firefox 8

Resolution Settings
- Minimum: 1024 x 768
- Recommended: 1366 x 768

1.2. GETTING STARTED

1.2.1 Logging in to SM Trade Portal

Once you meet the system requirements, you may now open the SM Trade Portal website.

1. Open your browser.
2. In the address bar type in "frg.smtradeportal.com" then hit Enter.
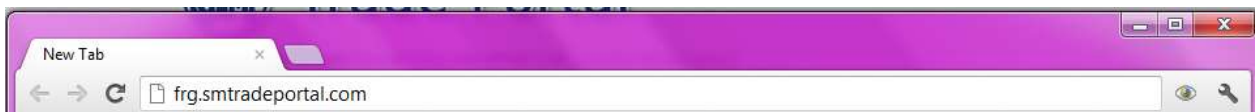
3. You are now at the SM Trade Portal Log-in page.

4. Enter your User ID and Password then click Login (or you may use Enter key) to start using the portal.

5. You are now on the SM Trade Portal Default Home Page.

1.2.2 Toolbar and Navigation

The Toolbar is located at the top portion of the portal. It will help you navigate to the other pages of the portal.

1.2.2.1 Home

The "Home" button will navigate you to the SMTP Default Home Page, which is the Business Document/Message System Home Page.

- To go to this page, click the "Home" toolbar button.

1.2.2.2 Bulletins

The "Bulletins" button will navigate you to the Vendor Community Management - Dynamic Bulletin System (DBS) where you may view bulletins and other important notifications.

- To go to this page, click the "Bulletins" toolbar button.

To learn more about using Dynamic Bulletin System (DBS), you may go to the Vendor Community Management (VCM) Section.

1.2.2.3 My Account

The "My Account" button will navigate you to the My Account page, where you may view or update your account profile.

- To go to this page, click the "My Account" toolbar button.

To learn more about using "My Account", go to My Account Section.

1.2.2.4 BDMS

The "BDMS" button will navigate you to the Business Document/Message System Home page where you can view and download your documents.

- To go to this page, click the "BDMS" toolbar button.
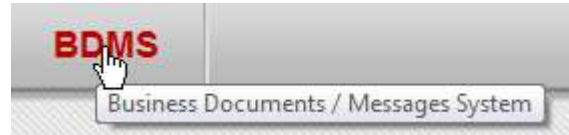
 To learn more about using "BDMS", go to Business Document/Message System Section.

1.2.3 Viewing/Exporting Session Logs

- To view session logs, click the "View logs" located at the header right below the SM Trade Portal logo. A pop-up window will appear displaying the user's 100 latest activities.

- When the number of entries in your log exceeds 100, only the latest 100 entries will be displayed. You may view older log entries by exporting them as PDF, CSV, or text file formats.
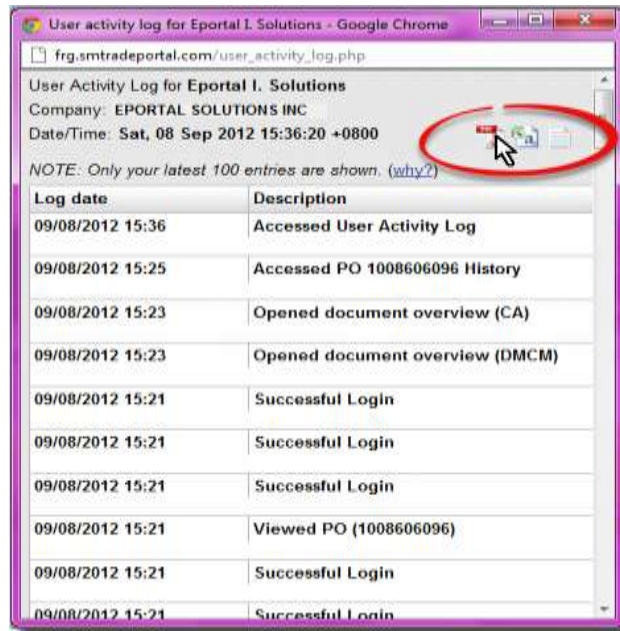
- To export session logs to PDF format, click the PDF button located at the upper right side of the pop-up window.

- To export session logs to CSV format, click the CSV button located at the upper right side of the pop-up window.

- To export session logs to plain text format, click the text file button located at the upper right side of the pop-up window.

2 BUSINESS DOCUMENT/MESSAGE SYSTEM (BDMS)

The Business Document/Message System (BDMS) for the Food Retail
Group is composed of 15 document types. These are the Purchase Orders (PO), the
Consignor Purchase Order (CPO), the Goods Receipt Notification (GRN), the Invoice
Confirmation Report (ICR), the Announcement for Return to Vendor (RTV), the
Remittance Advice (RA), the Debit Memo/Credit Memo (DMCM), the Credit Advice (CA),
the Service Receipt (SR), the RTV Deduction (RTVD), the Daily Sales Report (DSR), the
Daily Sales Report Summary (DSRS), the Consolidated Liquidation Report (CLR), or the
Expanding Withholding Tax (EWT).

2.1 NAVIGATING THE BUSINESS DOCUMENT/MESSAGE SYSTEM (BDMS) HOME PAGE

There are several ways to navigate to BDMS's home page:

1. On the portal's toolbar, you may click the "BDMS" toolbar button.

2. When you are in a particular document type page, and you wish to go back to the BDMS's home page, click the SM Trade Portal logo on the upper left side of the page.

3. You may also click the 'Home Business" button located at the right side of the page, beside the Refresh button.

2.2 BDMS DOCUMENT TYPES SUMMARY/ARCHIVE PAGE SECTIONS

The following are the sections of BDMS's Document Types Summary/Archive Page:

- System Header Section
- View Type Indicator Section
- Search Fields Section
- Results Summary & Display Count Section
- Page Mark Section
- Search Results Section *(shows data of the present month and the previous six months only)*
- Archiving, Download Options & Printing Section
- Notification Options

2.3 VIEW TYPE INDICATOR (LIVE/ARCHIVE)

Business documents/messages are segregated to two types based on the vendors' preferred relevance. Non-archived items may be viewed on the "Live" view while archived items may be found on the "Archive" view.

- The View Type Indicator located above the Search Field Section indicates which View Type you are at.

- The default view of the Summary Page is "Live" view. To access archived items, just click "View Archive" and you will be directed to the Archive Page where you may view archived items.

- To go back to "Live" view click "View Live" to be directed back to the Live Page where you may view the non-archived items.

2.4 BDMS DOCUMENT TYPES DETAILS PAGE SECTIONS

The following are the sections of BDMS's Document Types Details Page:
- Header Section
- Detail Count Section
- Status Message Section (for PO & CPO only)
- Detail Body Section

- Download Options & Printing Section
- Document Statistics

2.5 ARCHIVING, DOWNLOAD OPTIONS AND PRINTING

ARCHIVING

Archiving allows vendors to subjectively segregate business documents/messages based on their preferred relevance.

- To archive a specific document from the specific document summary page:

  1. Select a specific document in the Search Results Section by ticking the checkbox beside your selection. You may also select a batch of documents by ticking more than one checkbox.

  2. Click the Archive button in the Archiving, Download Options and Printing Section to transfer the selected document/s.

3. After clicking the Archive button, a message box will pop up to confirm your selection.

4. Upon clicking "Ok" button, a message box will confirm that you have successfully archived the document/s.

> *Unread documents cannot be archived. Archived documents/messages will no longer appear in the default "Live" Summary View.*

- Vendors also have the option to restore documents through the Archive Page view. To restore archived documents back to "Live" view:

  1. Select a specific document in the Search Results Section by ticking the checkbox beside your selection. You may also select a batch of documents by ticking more than one checkbox.

  2. Click the Restore Archived button in the Archiving section to transfer the selected document/s.

  3. After clicking the Restore Archived button, a message box will pop up to confirm your selection.

4. Upon clicking "Ok", a message box will confirm that you have successfully restored the document/s.

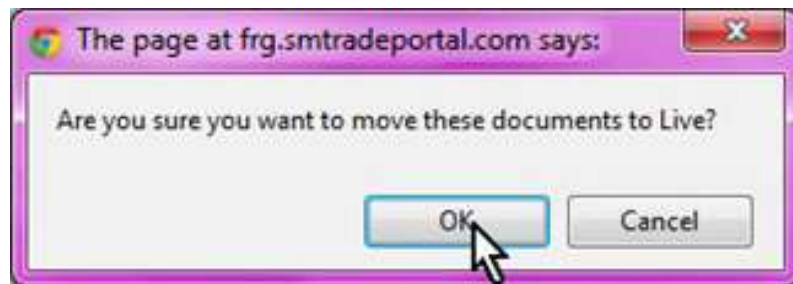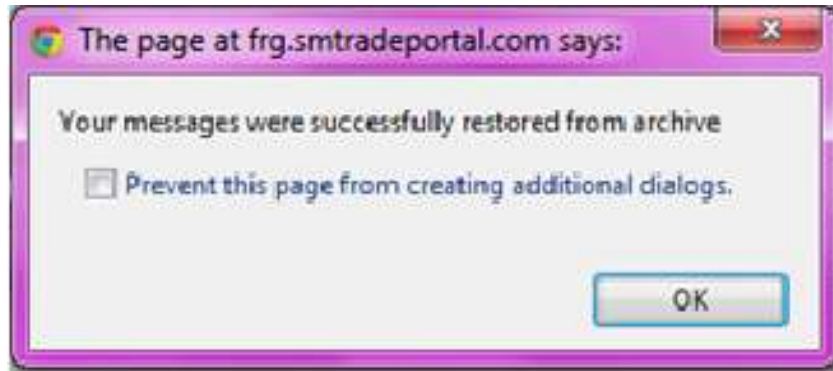Restored documents/messages will no longer appear in the "Archive" Summary View.

BATCH DOWNLOAD

You may download a specific document/message or a batch of them from the results in the Search Results Section, complete with all details, in any of the following formats: HyperText Markup Language (.html), Portable Document Format (.pdf), or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format:

    1. Select a specific document in the Search Results Section by ticking the checkbox beside your selection. You may also select batch of documents by ticking more than one checkbox.

    2. Click the HTML button in the Download Options & Printing Section. Your document will now start downloading.

- To download a specific document /message in PDF format:

    1. Select a specific document in the Search Results Section by ticking the checkbox beside your selection. You may also select batch of documents by ticking more than one checkbox.

    2. Click the PDF button in the Downloads & Printing Section.

3. After clicking the PDF button, a message box will pop up to confirm your selection. When you click "Ok", your document will now start downloading.

- To download a specific document /message in XML format:

  1. Select a specific document in the Search Results Section by ticking the checkbox beside your selection. You may also select a batch of documents by ticking more than one checkbox.

  2. Click the XML button on the Download Options & Printing Section. Your document will now start downloading.

- To send a specific document /message as a PDF attachment through email:

  1. Select a specific document in the Search Results Section by ticking the checkbox beside your selection. You may also select a batch of documents by ticking more than one checkbox.

  2. Click the Email button in the Download Options & Printing Section.
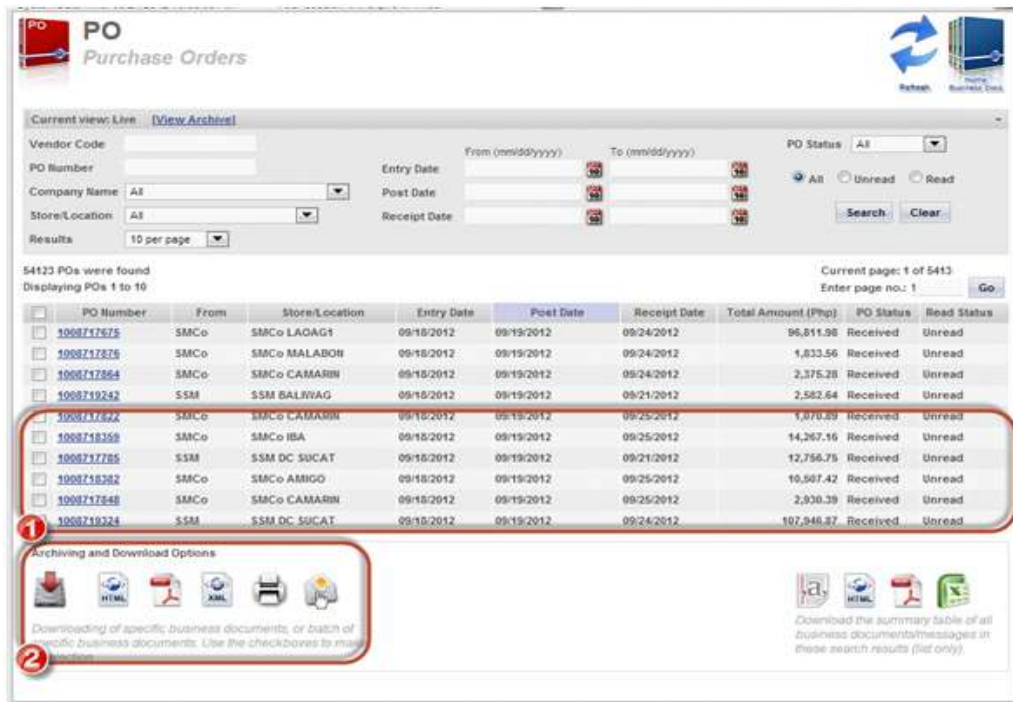
  3. Upon clicking the Email button, you will see the status of the said documents under the buttons in the Archiving and Download Options Section.
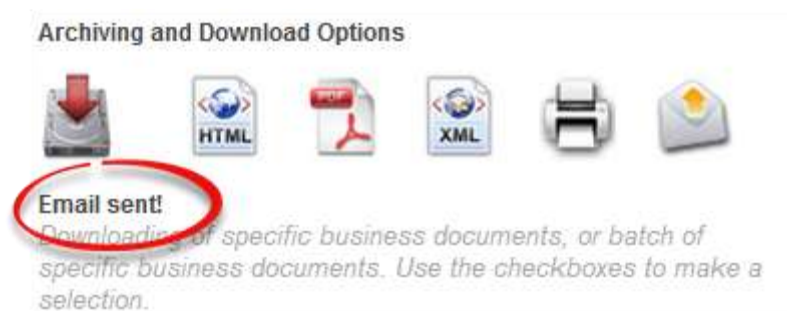
SUMMARY DOWNLOAD

You may download the Summary of Search Results in any of the following formats: Comma Separated Values (.csv), HyperText Markup Language (.html), Portable Document Format (.pdf) or Microsoft Excel (.xls).

- To download the summary table in CSV format, click the CSV button and the table will be downloaded.
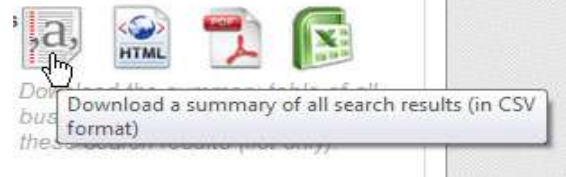
- To download the summary table in HTML format, click the HTML button and the table will be downloaded.

- To download the summary table in PDF format, click the PDF button and the table will be downloaded.

- To download the summary table in MS Excel format, click the Excel button and the table will be downloaded.

Download the summary of the business documents/messages in these search results (list only).

Download a summary of all search results (in XLS format)
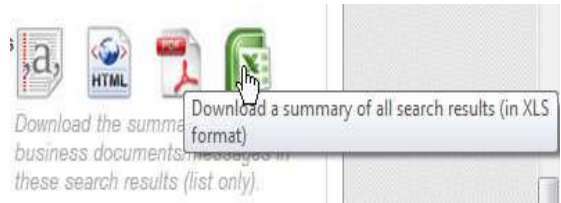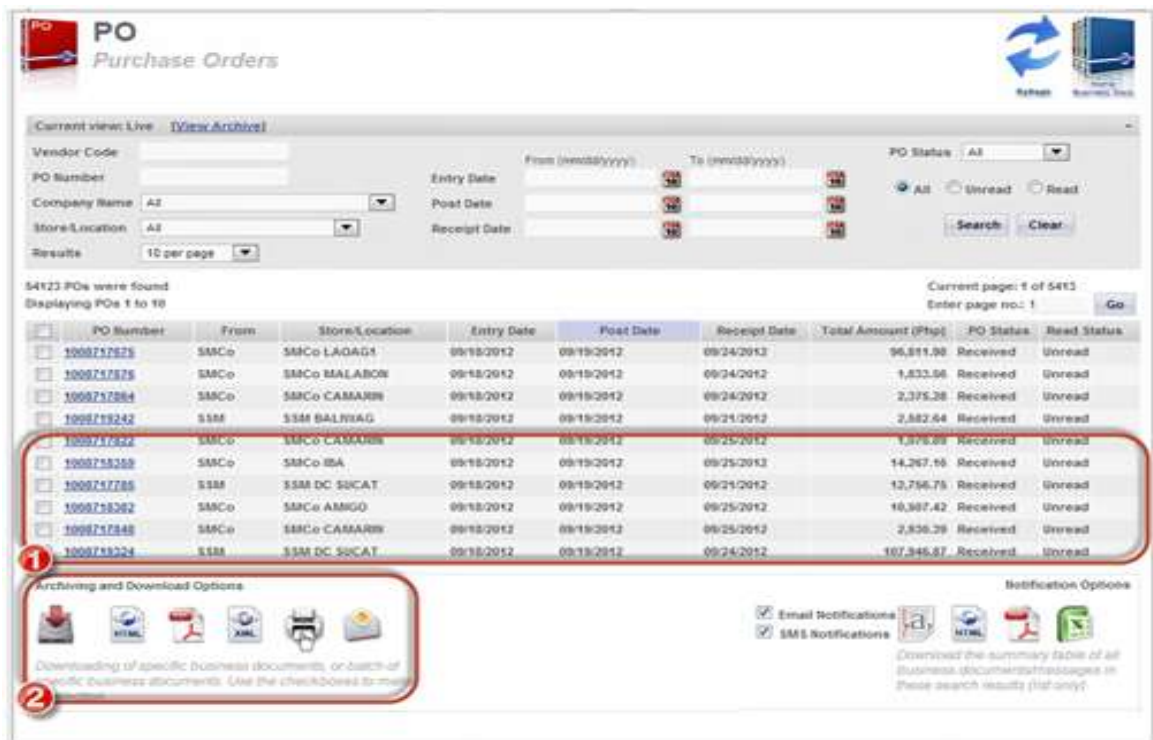
> ℹ️ For **CSV and MS Excel format**, the **maximum number of documents/messages for summary download is 65,000 documents**. You may use the Search fields to lessen the number of the summary results.

PRINTING

You may also print a specific document/message or a batch of them from the results displayed in the Search Results Section, complete with all details.

- To print a specific document/message, (1) select a specific document in the Search Results Section by ticking the checkbox beside your selection. You may also select a batch of documents by ticking more than one checkbox; and, (2) click the Print button on th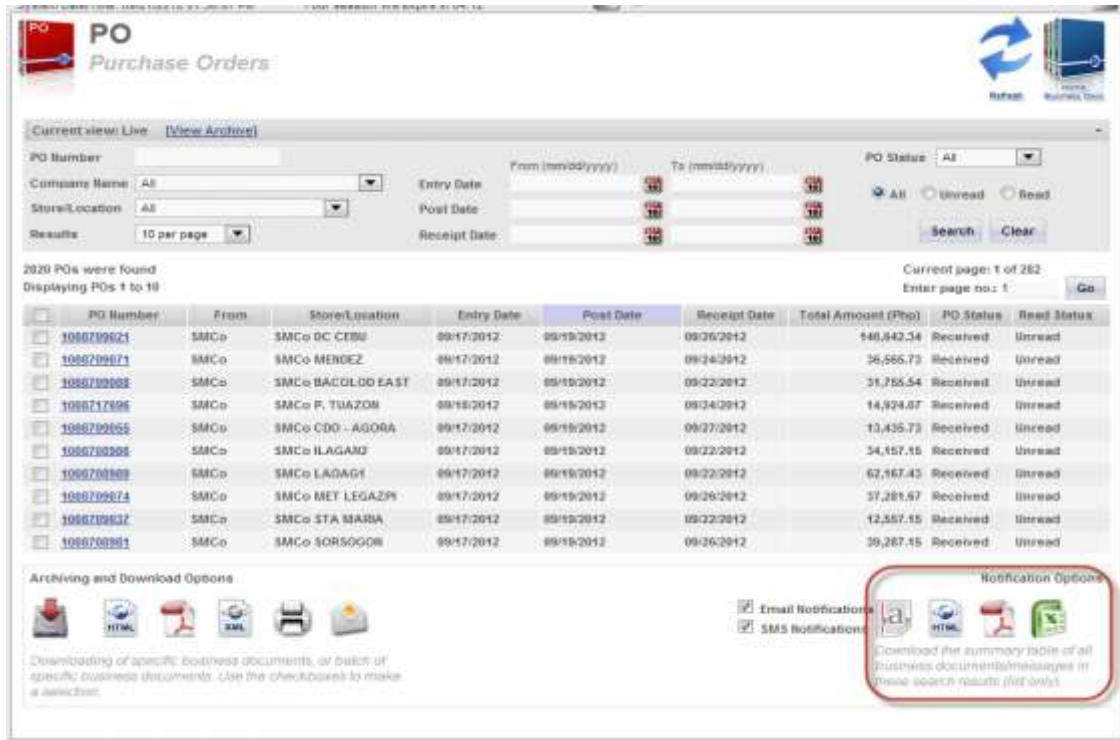e Download Options & Printing Section and your browser's print preview page will appear. You may also input your preferred settings.

2.6 NOTIFICATION OPTIONS SECTION

Notification of new business documents/messages for each specific vendor may be done either through email, Short Message Services (SMS), or both. This allows the Vendor Administrator to indicate his desired notification service by ticking the respective check-boxes.

All options are checked by default meaning, both SMS and Email notifications for this user are enabled. The user may choose not to receive either SMS or Email or both notifications by un-checking the respective checkbox.
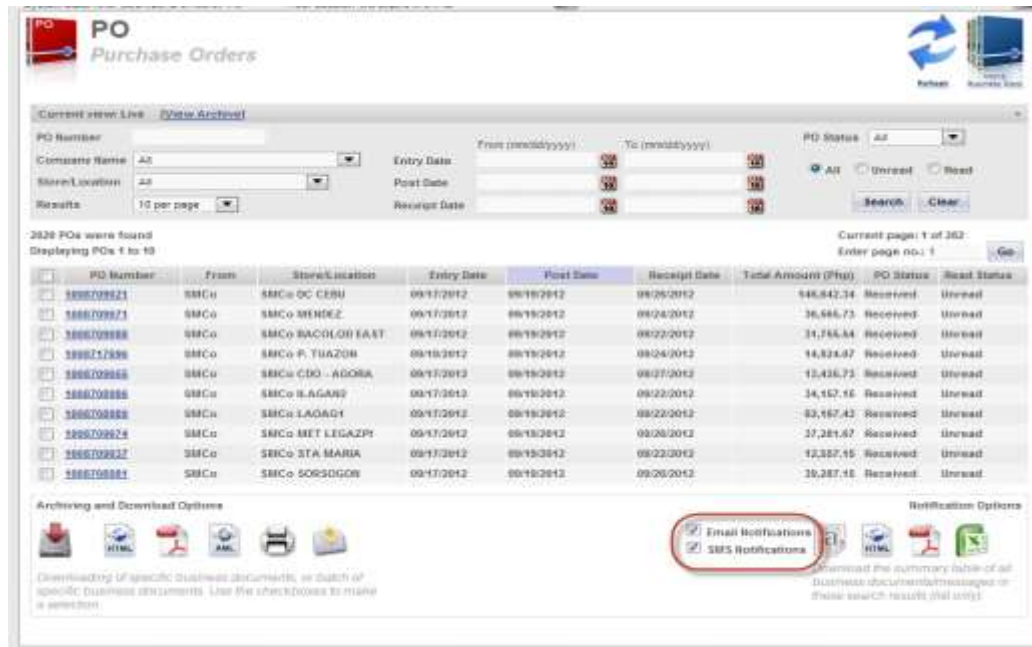
2.7 USING THE DOCUMENT TYPE SCROLL BAR

You may navigate to the different document types using the scroll bar.

- Click and hold the right or left arrow of the scroll bar until you see the button of the document type you want to view.
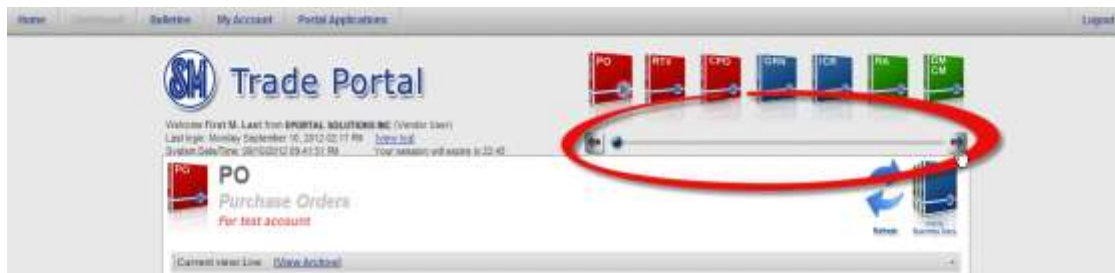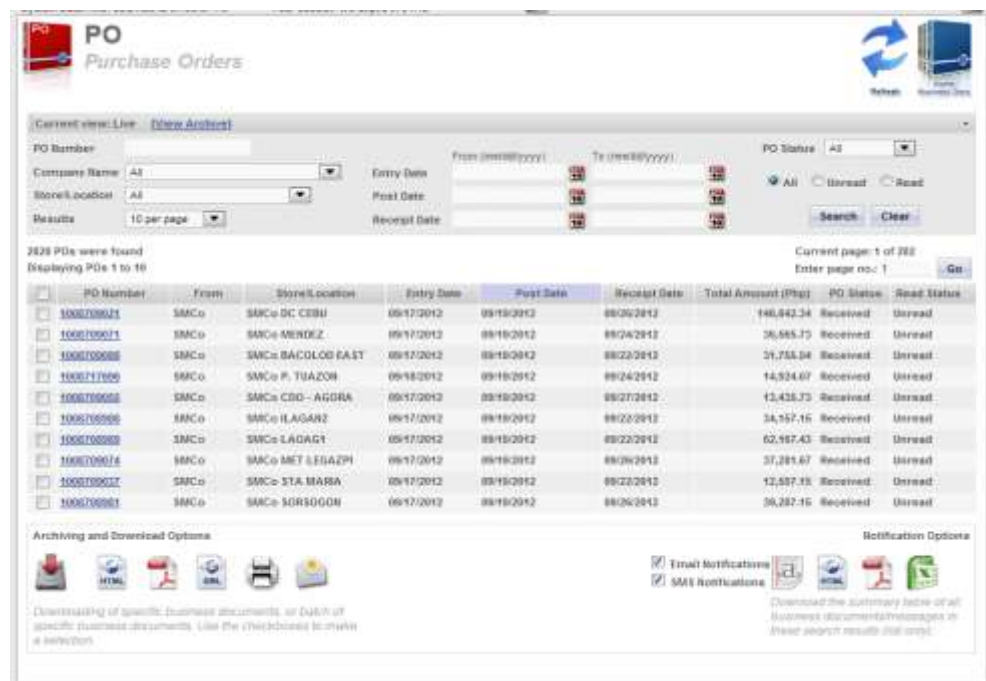
2.8 PURCHASE ORDERS (PO)

2.8.1 Accessing the PO Summary Page

1. To access the PO summary page, go back to the BDMS home page and click the PO button.

2. You are now at the PO summary page.

2.8.2 PO Summary Page & PO Archive Page

2.8.2.1 PO Search Fields

You may search PO using the following criteria:
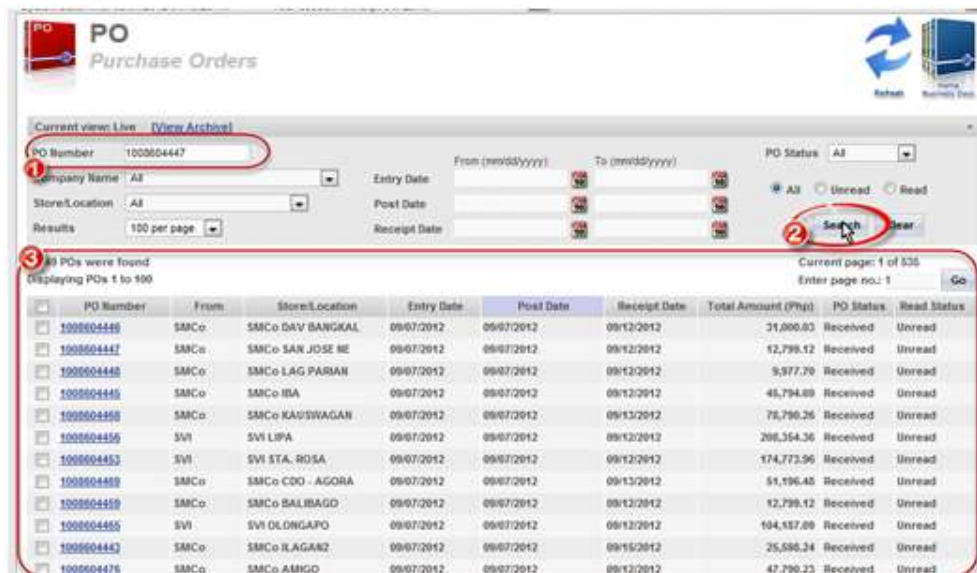
a. PO Number
b. Company Name
c. Store/Location
d. Number of Records to display per page (Results)
e. Entry Date, Post Date, Receipt Date
f. Document Status (Received, Downloaded, Cancelled)
g. Read Status (Unread, Read)

To get more accurate results, you may combine the criteria when you search.

a. To search for POs using a PO Number

1. Key in the PO number in the text box.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

i The maximum number of characters for the PO number is 35. The textbox also accepts numeric characters only and will search for PO Numbers containing the indicated number.

b. To search for POs by Company Name

1. Click the drop-down list then select the company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

c. To search for POs by Store/Location

1. Click the drop-down list then select a store/location or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
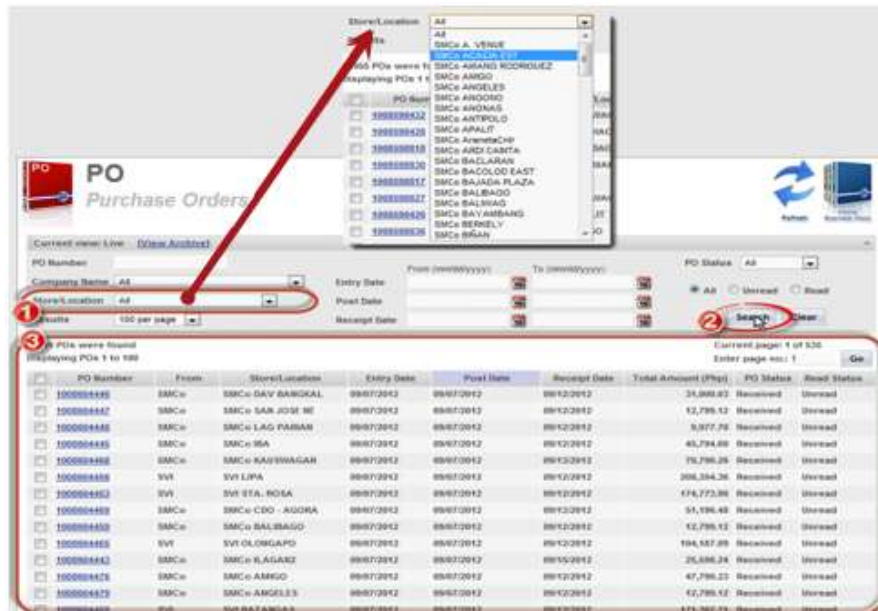
d. To filter the Number of Records to Display per page

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
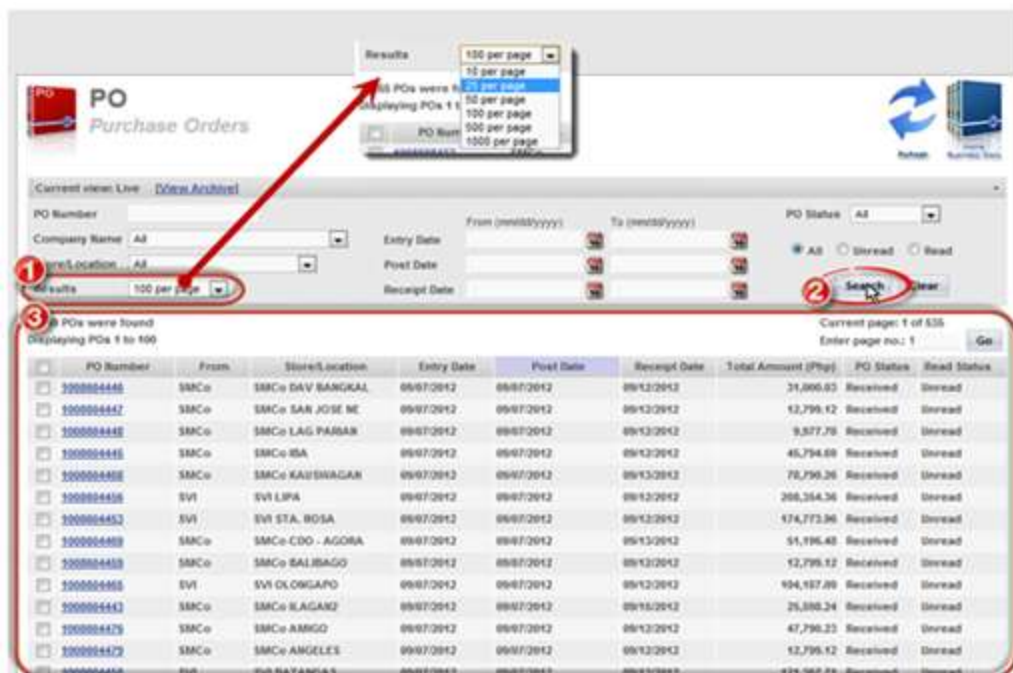
e. **To search POs using their Entry Dates, Post Date or Receipt Date**

1. Manually key in the Entry Date, Post Date or Receipt Date using the format 'mm/dd/yyyy' or you may also select the dates using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
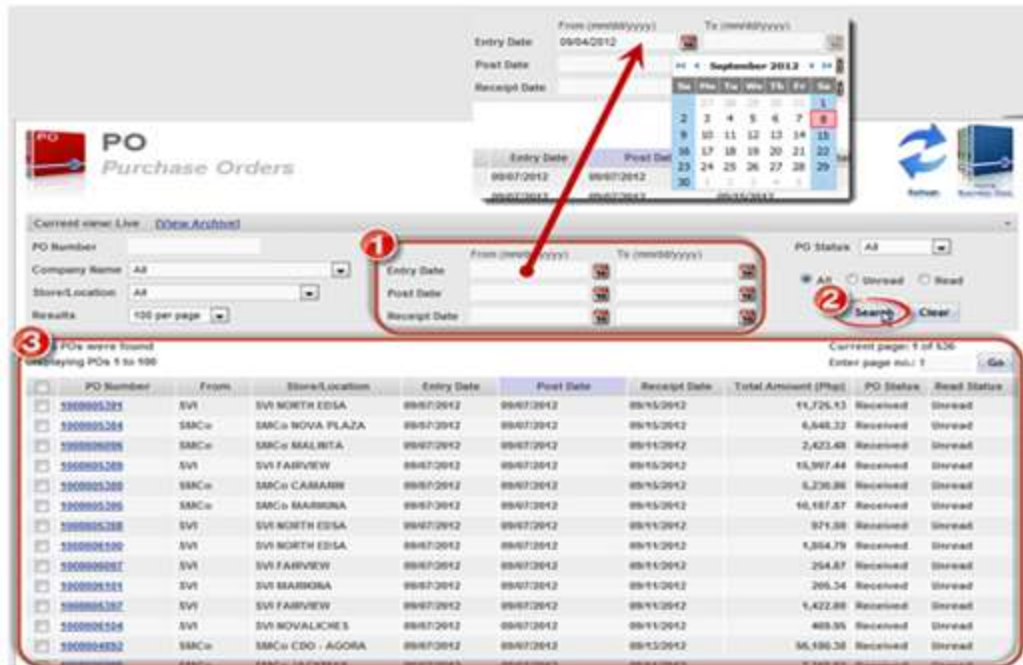
The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

f. **To search for POs by Document Status**

1. Click the drop-down list then select a PO status or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
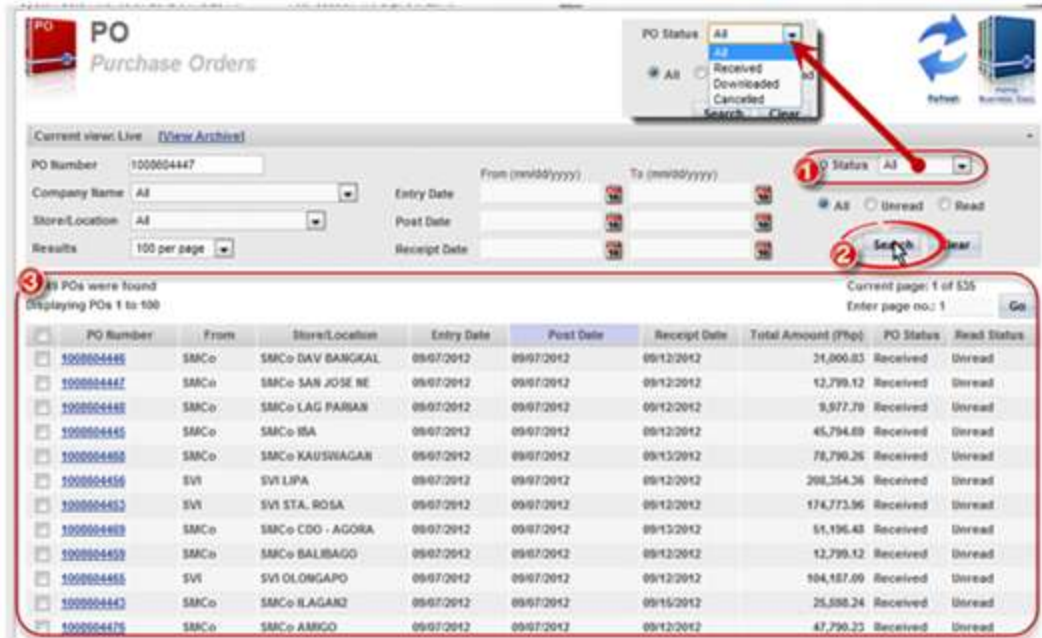
g. To search for POs by Read Status

1. Choose a PO status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

2.8.2.2 PO Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered) (1) key in a specific page number (2) then hit the "Go" button; and, (3) the table will display the results.

This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.8.2.3 Sorting PO Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Entry Date

2.8.3 PO Details Page

2.8.3.1 Opening a Specific PO Document

On the Search Results Section, click the PO number of the specific PO document you want to open.

After clicking the PO number, you will be directed to its details page.

2.8.3.2 Returning to the PO Summary Page

To return to the summary page after opening a specific PO document, just click "Back to PO Summary" (if you have opened a document in "Live" view) or "Back to PO Archive" (if you have opened a document in "Archive" view) located at the Detail Count Section.

2.8.3.3 PO Download Options & Printing

You may download a specific document /message currently shown in the Details Page in any of the following formats: HyperText Markup Language (.html), Portable Document Format (.pdf), or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the Email button on the Download Options & Printing Section.

You may also print a specific document/message shown in the Details Page resembling the official business document/message.

- To print a specific document/message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.

2.8.3.4 Viewing PO Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

   - To view the document histories click "View document history".

- A pop-up box will show the document history for the opened PO document.
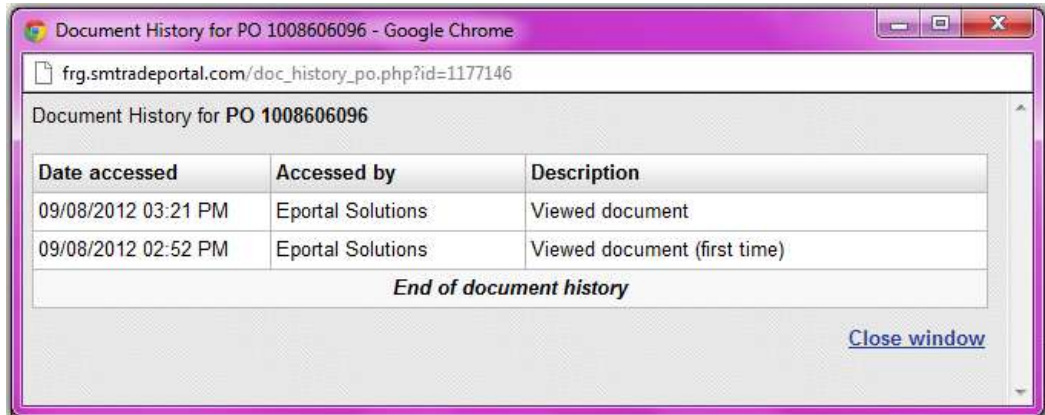
2.9 CONSIGNOR PURCHASE ORDERS (CPO)

2.9.1 Accessing the CPO Summary Page

1. To access the CPO summary page, go to the BDMS home page then click the CPO button.

2. You are now at the CPO summary page.

2.9.2 CPO Summary Page & CPO Archive Page

2.9.2.1 CPO Search Fields

You may search CPO using the following criteria:

a. PO Number
b. Company Name
c. Store/Location
d. Number of Records to display per page(Results)
e. Entry Date, Post Date, Receipt Date
f. Document Status (Received, Downloaded, Cancelled)
g. Read Status (Unread, Read)

 To get more accurate results, you may combine the criteria when you search.

a. To search for CPOs by PO Number

1. Key in the PO number in the text box.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
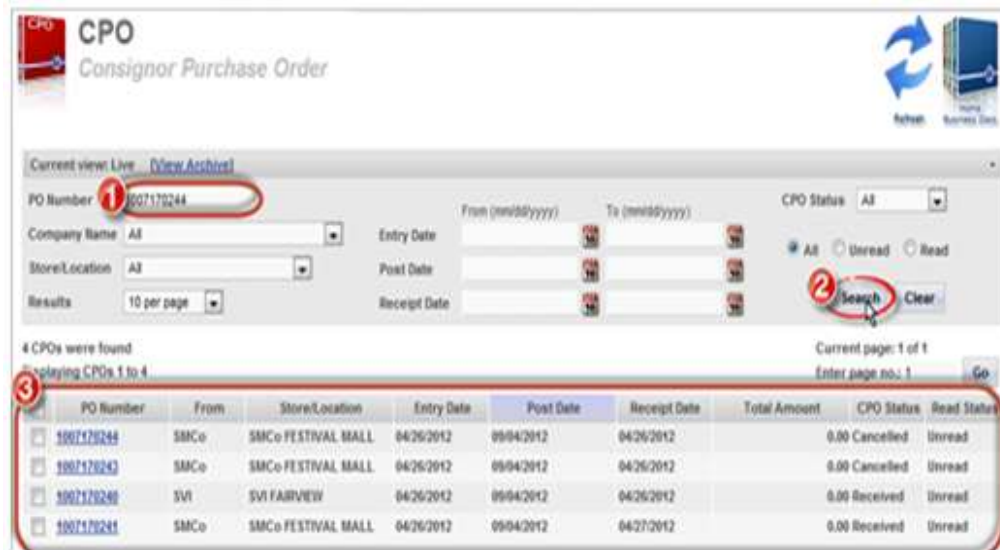
b. To search for CPOs by Company Name

1. Click the drop-down list then select a specific company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
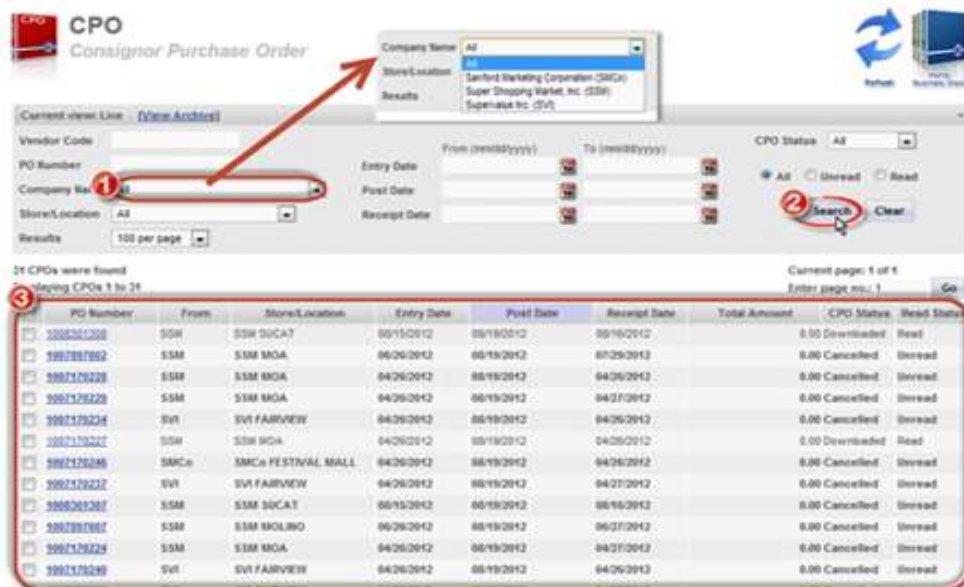
c. To search for CPOs with a certain Store/Location

1. Click the drop-down list then select a store/location or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
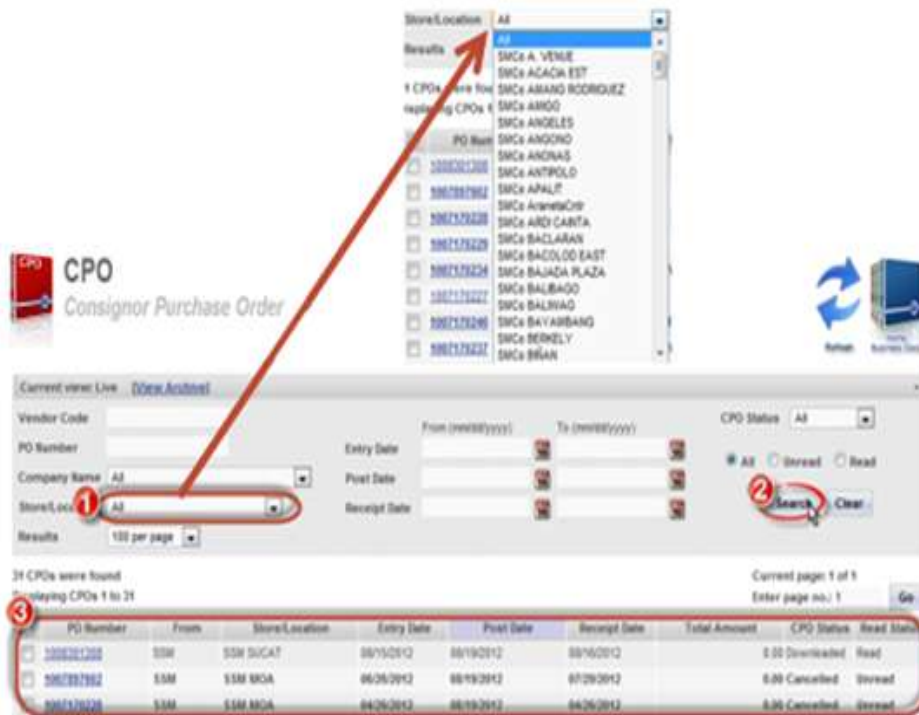
d. To filter the Number of Records to Display on per page

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
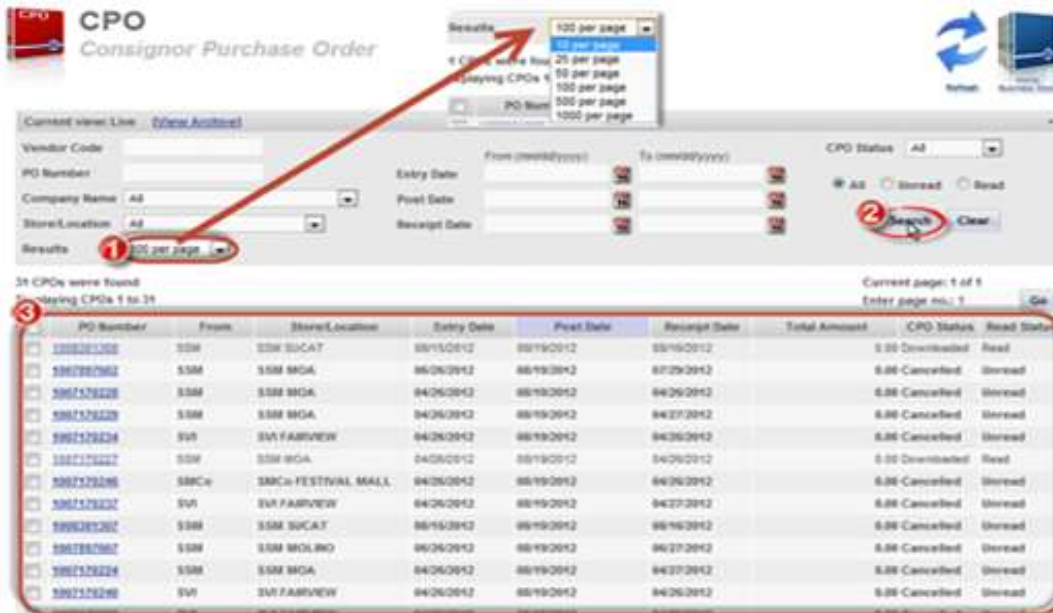
e. To search for CPOs by their Entry Dates, Post Date or Receipt Date

1. Manually key in Entry Date, Post Date or Receipt Date using the format 'mm/dd/yyyy' or you may also select the dates using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
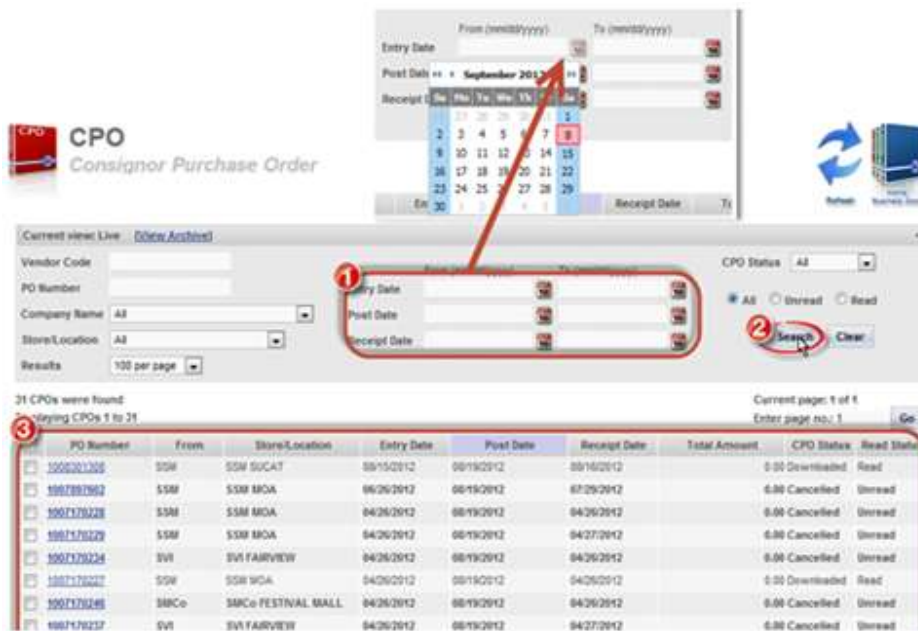
The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.
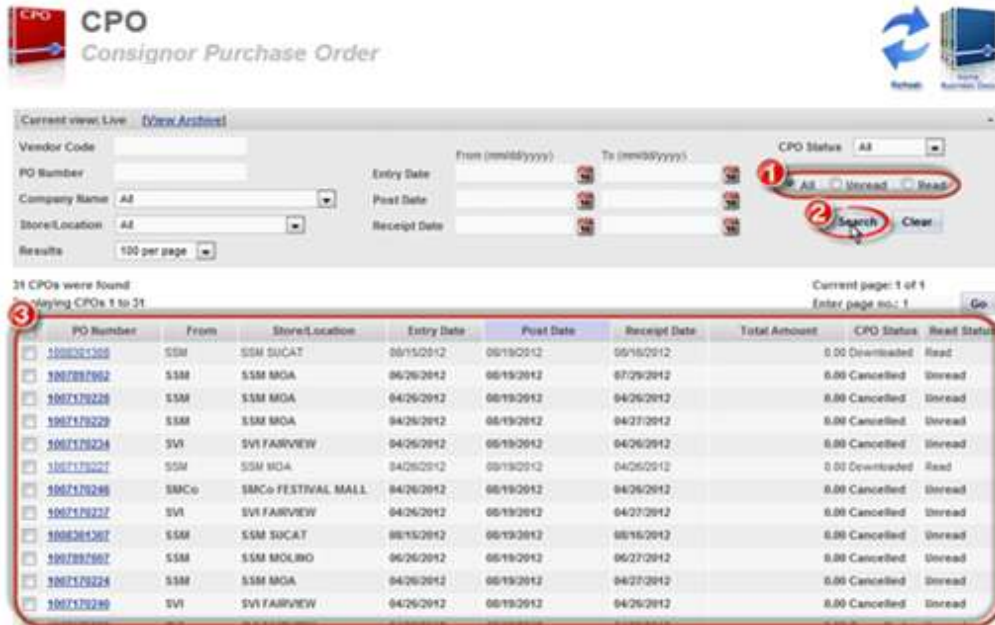
f. To search for CPO's by Document Status

1. Click the drop-down list then select a CPO status or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
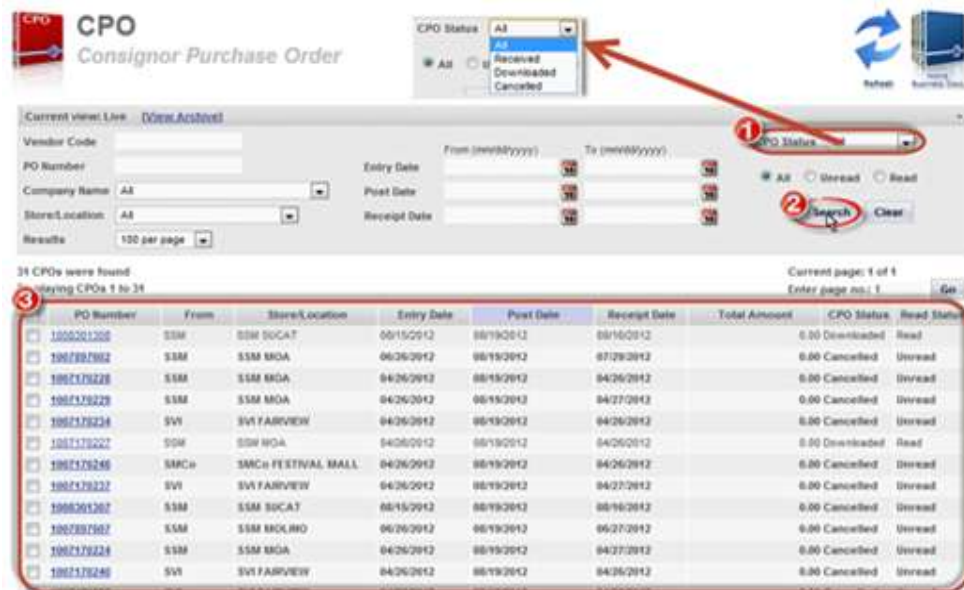
g. To search for CPO's by Read Status

1. Choose a CPO status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right.

3. After clicking the Search button, the table will display the results.

2.9.2.2 CPO Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered) (1) key in a specific page number (2) then hit the "Go" button; and, (3) the table will display the results.

This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.9.2.3 Sorting CPO Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Post Date

2.9.3 CPO Details Page

2.9.3.1 Opening a Specific CPO Document

On the Search Results Section, click the CPO number of the specific CPO document you want to open.
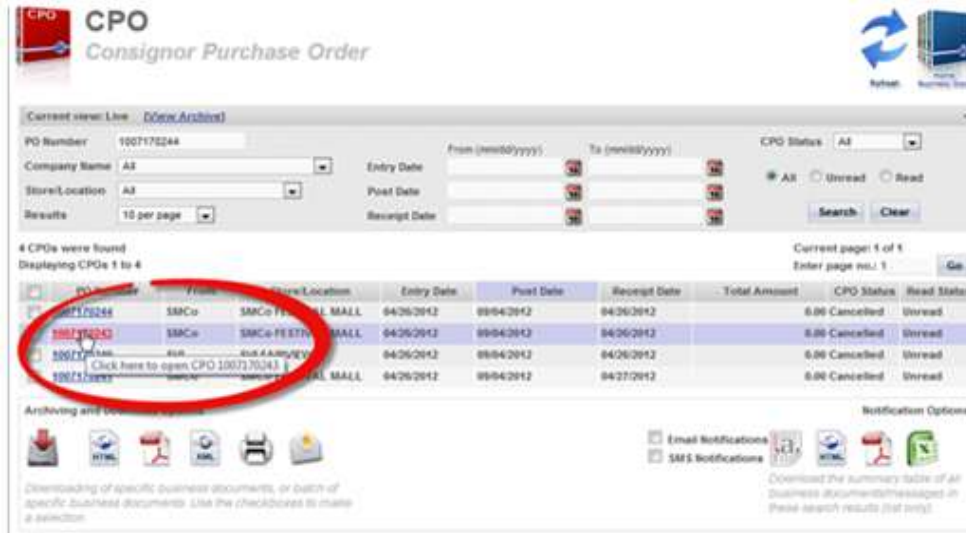
After clicking the CPO number, you will be directed to its details page.

2.9.3.2 Returning to the CPO Summary Page

To return to the summary page after opening a specific CPO Document, just click "Back to CPO Summary" (if you have opened a document in "Live" view) or "Back to CPO Archive" (if you have opened a document in "Archive" view) located at the Detail Count Section.

2.9.3.3 CPO Download Options & Printing

You may download a specific document/message currently shown in the Details Page in any of the following formats: HyperText Markup Language (.html), Portable Document Format (.pdf), or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

Download Options
Download this CPO in PDF format

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

Download Options
Download this CPO in XML format

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

Download Options
Send this CPO through email

You may also print a specific document/message shown in the Details Page resembling the official business document/message.

- To print a specific document/message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.

Print
Print this CPO

2.9.3.4 Viewing CPO Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

   - To view the document histories click "View document history".

   - A pop-up box will show the document history for the opened CPO document.
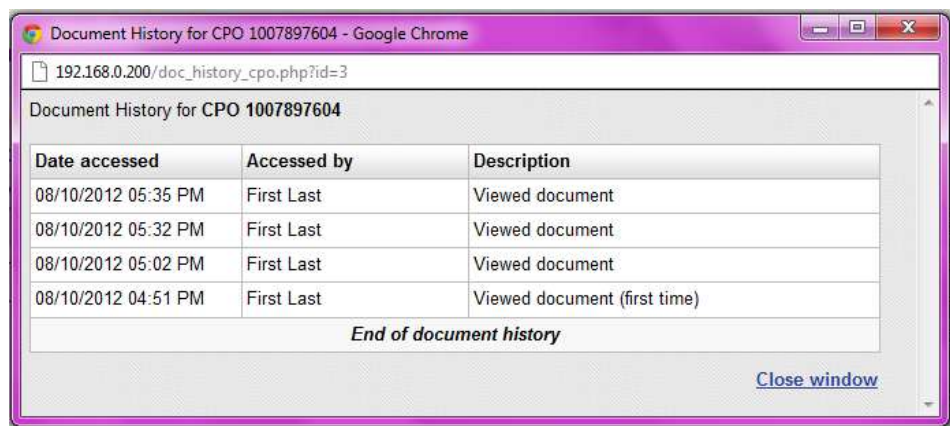
2.10 GOODS RECEIPT NOTIFICATION (GRN)

2.10.1 Accessing the GRN Summary Page

1. To access the Goods Receipt Notification summary page, go to the BDMS home page and click the GRN button.

2. You are now on GRN summary page.
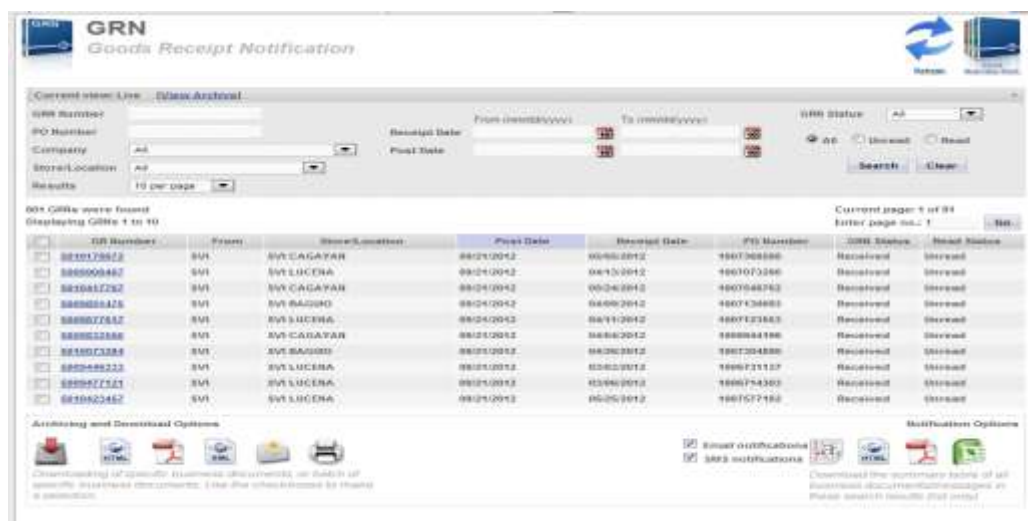
2.10.2 GRN Summary Page & GRN Archive Page

2.10.2.1 GRN Search Fields

You may search GRN using the following criteria:
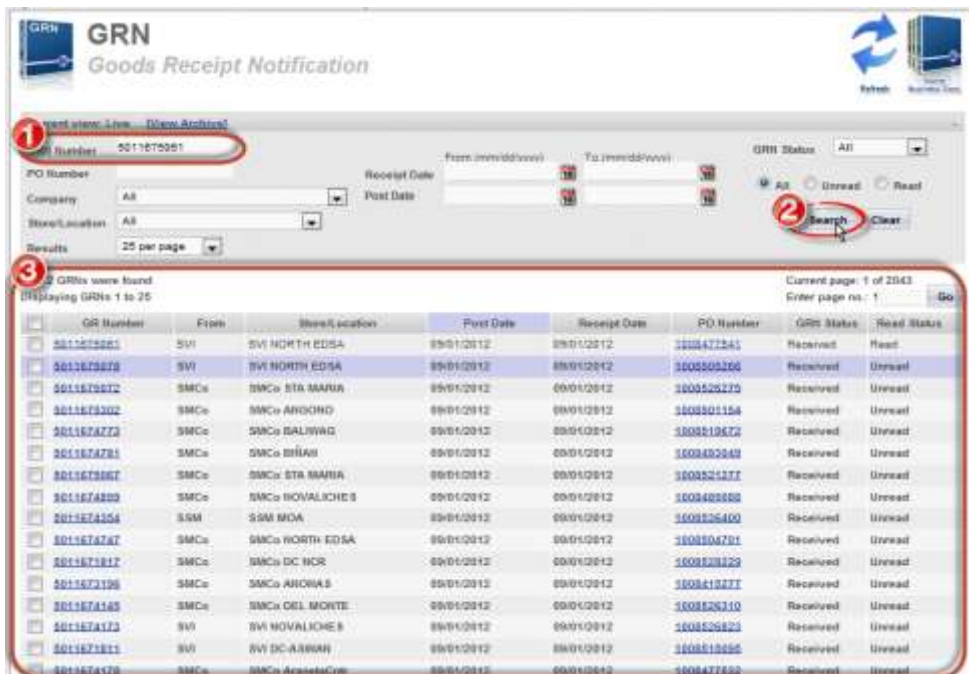
a. GRN Number
b. PO Number
c. Company Name
d. Store/Location
e. Number of Records to display per page(Results)
f. Receipt Date, Post Date
g. Document Status (Received, Downloaded)
h. Read Status (Unread, Read)

To get more accurate results, you may combine the criteria when you search.

a. To search for GRNs by GRN Number

1. Key in the GRN number in the text box.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

The maximum number of characters for the GRN number is 10. The text box accepts numeric characters only and will search for GRN numbers containing the indicated number.

b. To search for GRNs by PO Number

1. Key in the PO number in the text box.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

The maximum number of characters for PO number is 35. The text box accepts numeric characters only and will search for PO numbers containing the indicated number.

c. To search for GRNs by Company Name

1. Click the drop-down list then select a specific company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
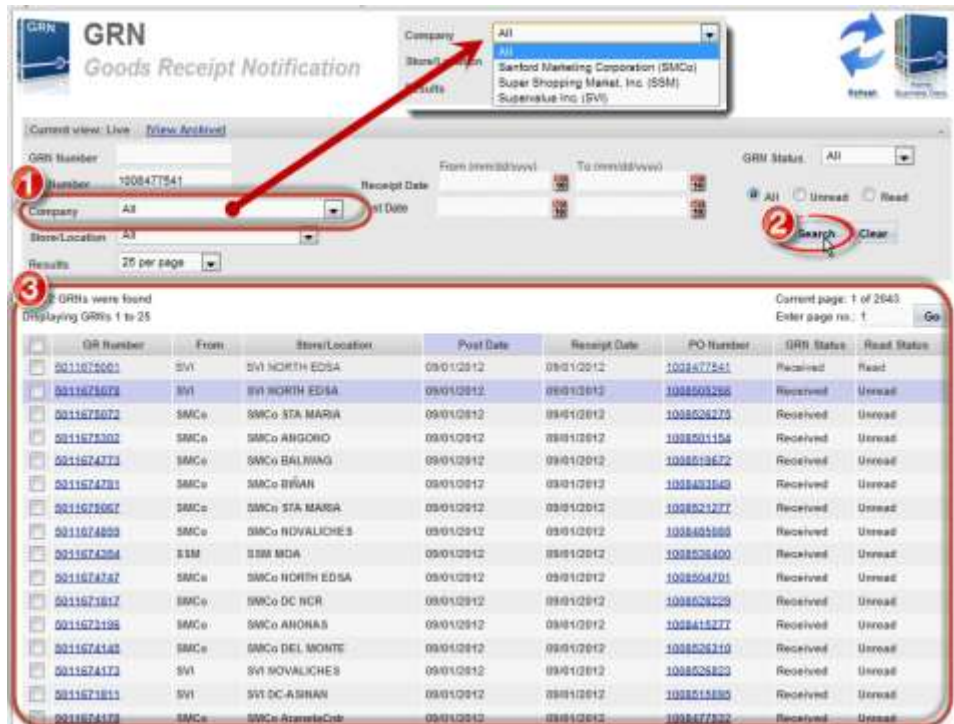
d. To search for GRNs by Store/Location

1. Click the drop-down list then select a store/location or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
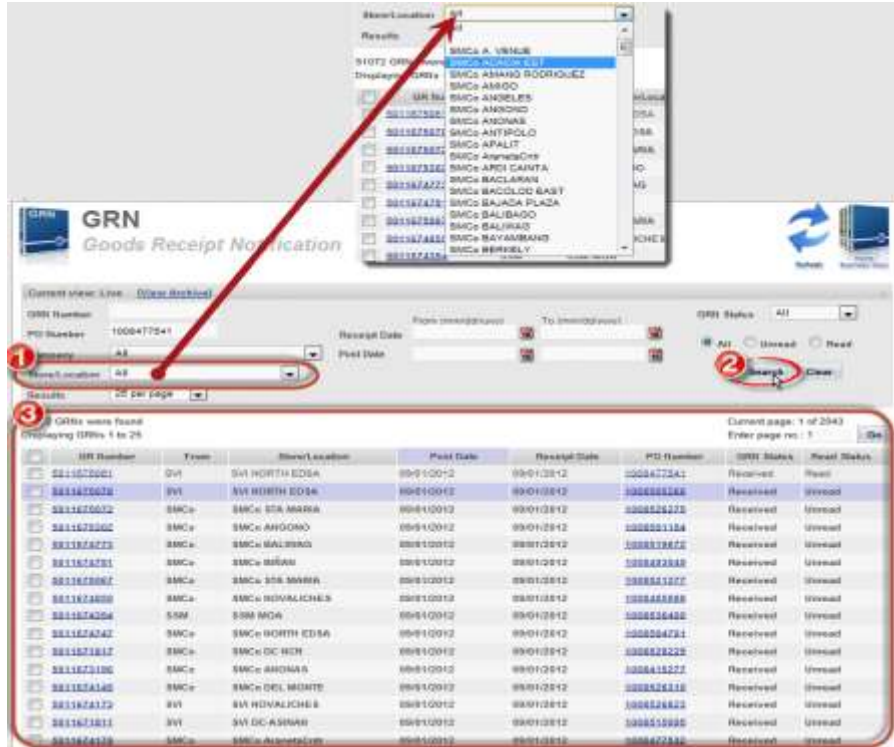
e. To filter the Number of Records to Display per page

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
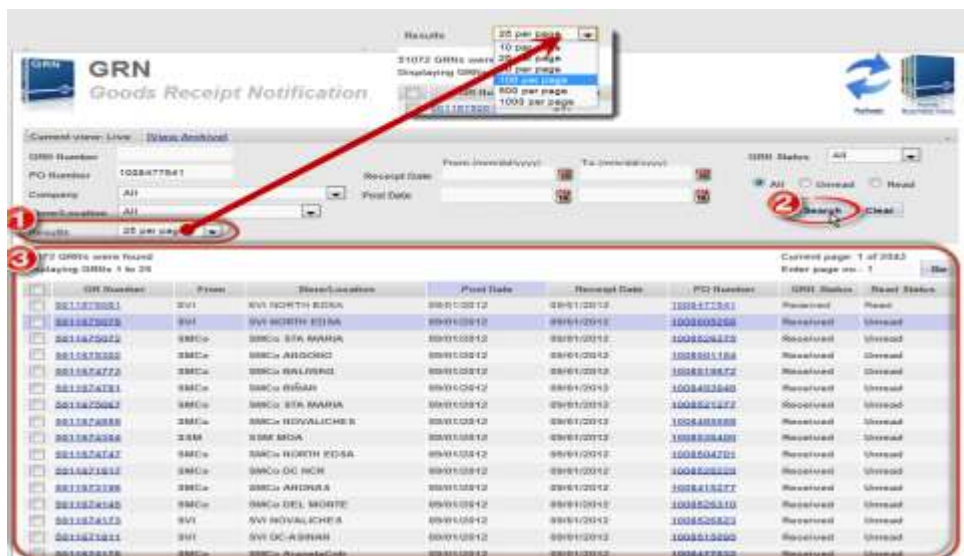
f. To search for GRNs by Receipt Date, Post Date

1. You may manually key in the Receipt Date or Post Date using the format 'mm/dd/yyyy' or you may also select the dates using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

ℹ️ The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

g. To search for GRNs by Document Status

1. Click the drop-down list then select a GRN status or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

h. **To search for GRNs by Read Status**

1. Choose a GRN status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

2.10.2.2 GRN Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered) (1) key in a specific page number (2) then hit the "Go" button; and, (3) the table will display the results.

This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.10.2.3 Sorting GRN Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Post Date

2.10.3 GRN Details Page

2.10.3.1 Opening a Specific GRN Document

On the Search Results Section, click the GR number of the specific GRN document you want to open.

After clicking the PO number, you will be directed to its details page.

2.10.3.2 Viewing Related PO Document

On the GRN Summary/Archive page and GRN Details page, you may also view the related PO document/message that corresponds to the GRN Document.

- To open the related PO document on Summary/Archive page (1) just click the PO number of the specific GRN document you want to view; and, (2) a pop-up window will appear showing the corresponding PO Details.
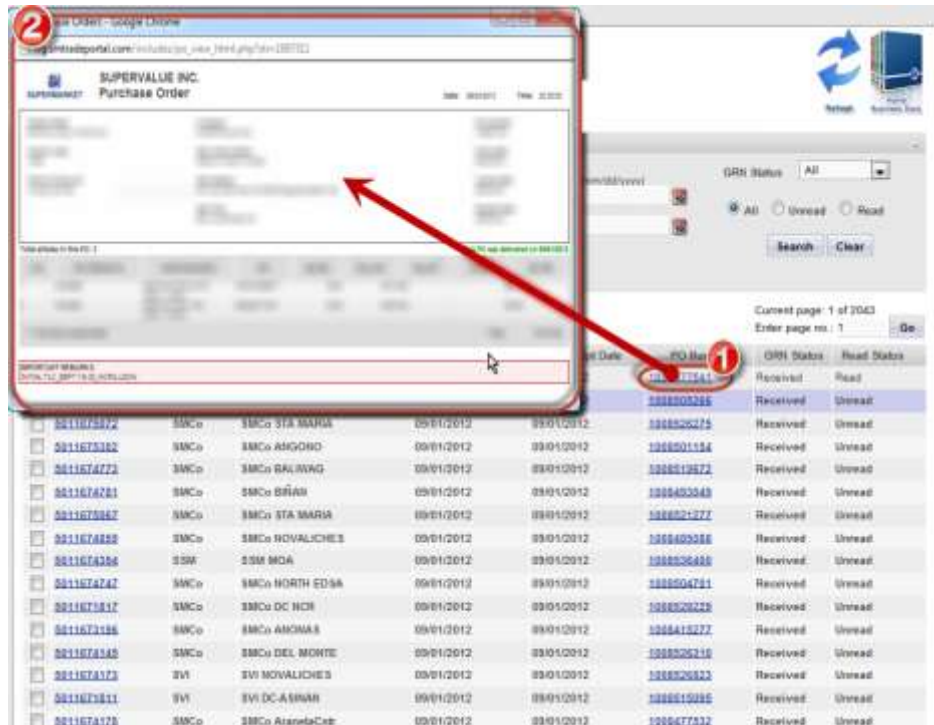
- To open the related PO document on the Details page (1) click the PO number located at the right side of the Header Section; and, (2) a pop-up window will appear showing the corresponding PO Details.
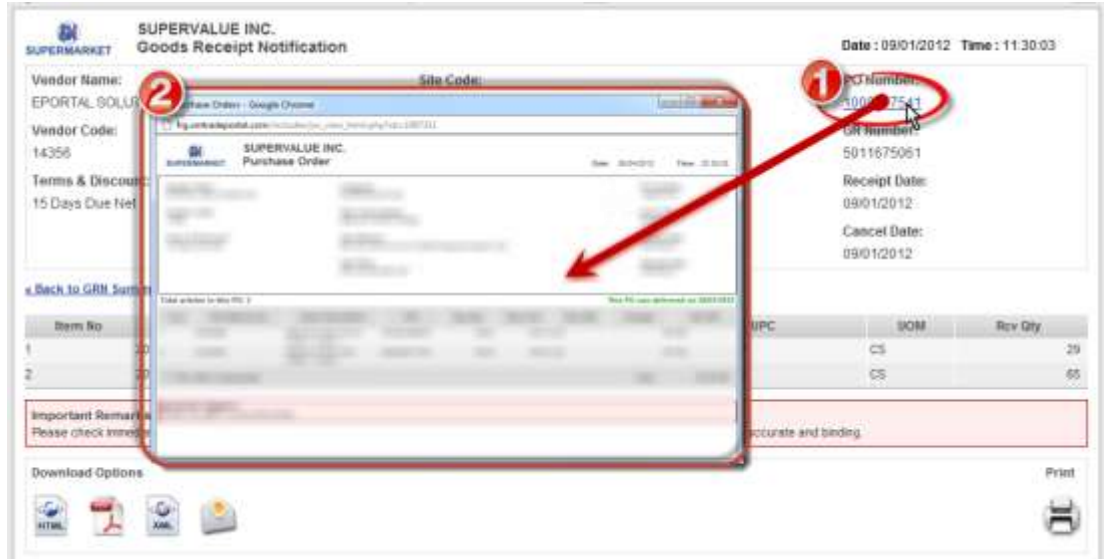
This will only be available if there is a corresponding PO on the portal. If there is none, the PO Number will not be clickable.

2.10.3.3 Returning to the GRN Summary Page

To return to the summary page after opening a specific GRN Document, just click "Back to GRN Summary" located at the Detail Count Section.

2.10.3.4 GRN Download Options & Printing

You may download a specific document /message currently shown in the Details Page in any of the following formats: HyperText Markup Language (.html), Portable Document Format (.pdf), or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

You may also print specific document/message shown in the Details Page resembling the official business document/message.

- To print a specific document/message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.

2.10.3.5 Viewing GRN Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

   - To view the document histories click the "View document history".

- A pop-up box will show the document history for the opened GRN document.

2.11 INVOICE CONFIRMATION REPORT (ICR)

2.11.1 Accessing the ICR Summary Page

1. To access the ICR summary page, go to the BDMS home page then click the Invoice Confirmation Report button.

2. You are now on ICR summary page.

2.11.2 ICR Summary Page & ICR Archive Page

2.11.2.1 ICR Search Fields

You may search ICR using the following criteria:

a. ICR Number
b. Company Name
c. Store/Location
d. Number of Records to display per page(Results)
e. Receiving Date, Post Date
f. Document Status (Received, Downloaded)
g. Read Status (Unread, Read)

To get more accurate results, you may combine the criteria when you search.

a. To search for ICRs by ICR Number

1. Key in the ICR number in the text box.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

The maximum number of characters for ICR number is 10. The text box accepts numeric characters only and will search for ICR numbers containing the indicated number.

b. To search for ICRs by Company Name

1. Click the drop-down list then select a specific company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

c. To search for ICRs by Store/Location

1. Click the drop-down list then select a store/location or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

d. To filter the Number of Records to Display per page

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

e. To search for ICRs using their Receiving Date, Post Date

1. Manually key in the Receiving Date or Post Date using the format 'mm/dd/yyyy' or you may also select a date using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

ℹ The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

f. To search for ICRs by Document Status

1. Click the drop-down list then select an ICR status or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

g. To search for ICRs by Read Status

1. Choose an ICR status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
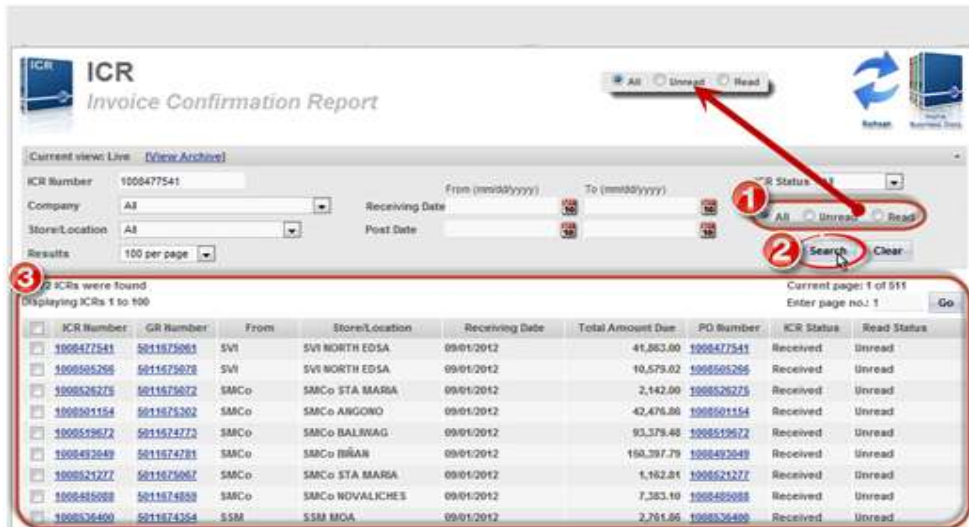
2.11.2.2 ICR Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered) (1) key in a specific page number (2) then hit the "Go" button; and, (3) the table will display the results.
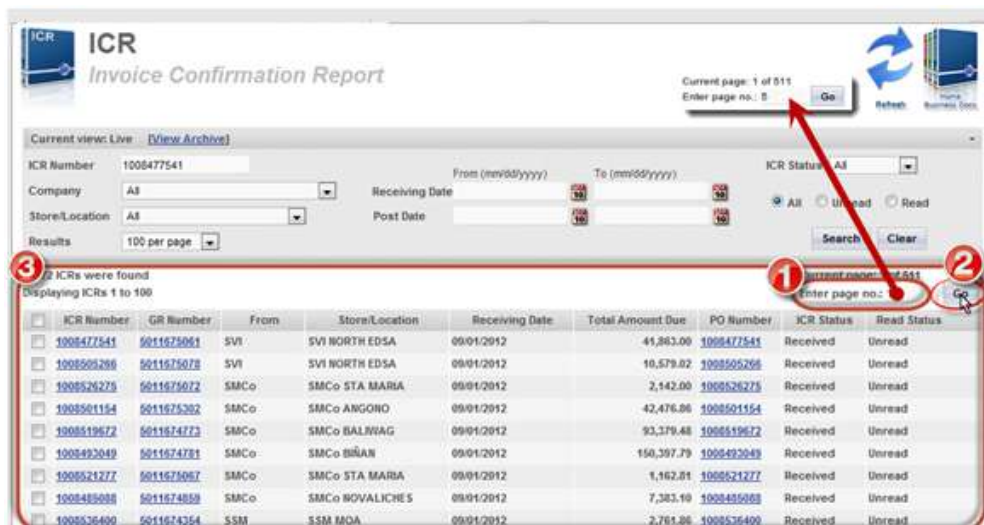
This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.11.2.3 Sorting ICR Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Store/Location (Ascending Order)

2.11.3 ICR Details Page

2.11.3.1 Opening a Specific ICR Document

On the Search Results Section, click the ICR number of the specific ICR document you want to open.

After clicking the ICR number, you will be directed to its details page.

2.11.3.2 Viewing Related GRN & PO Document

A. **On the ICR Summary/Archive Page and ICR Details page, you may also view the related GRN document/message that corresponds to the ICR Document.**

- To open the related GRN document on Summary/Archive Page (1) just click the Goods Receipt (GR) number of the specific ICR document you want to view; and, (2) a pop-up window will appear showing the corresponding GR Details.
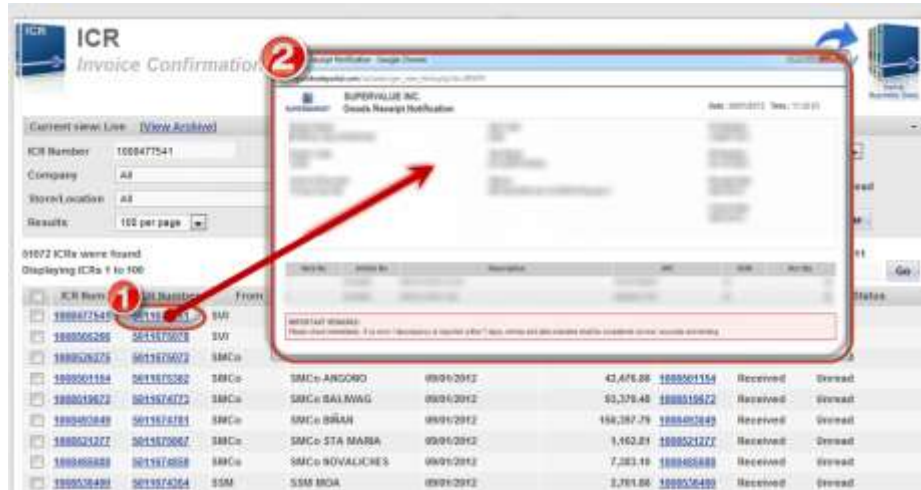
- To open the related GRN document on Details Page, click the Goods Receipt (GR) number located at the bottom part of the Detail Body Section and a pop-up window will appear showing the corresponding GR Details.
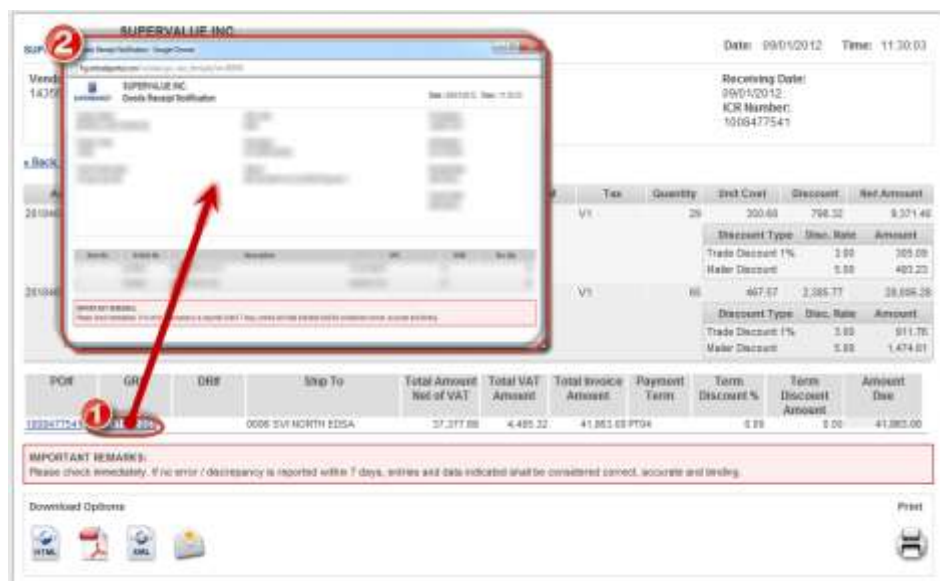
> **i** This will only be available if there is a corresponding GRN on the portal. If there is none, the GR Number will not be clickable.

B. **On the ICR Summary/Archive page and ICR Details page, you may also view the related PO document/message that corresponds to the ICR Document.**

- To open the related PO document on Summary/Archive Page, click the PO number of the specific ICR document you want to view and a pop-up window will appear showing the corresponding PO Details.
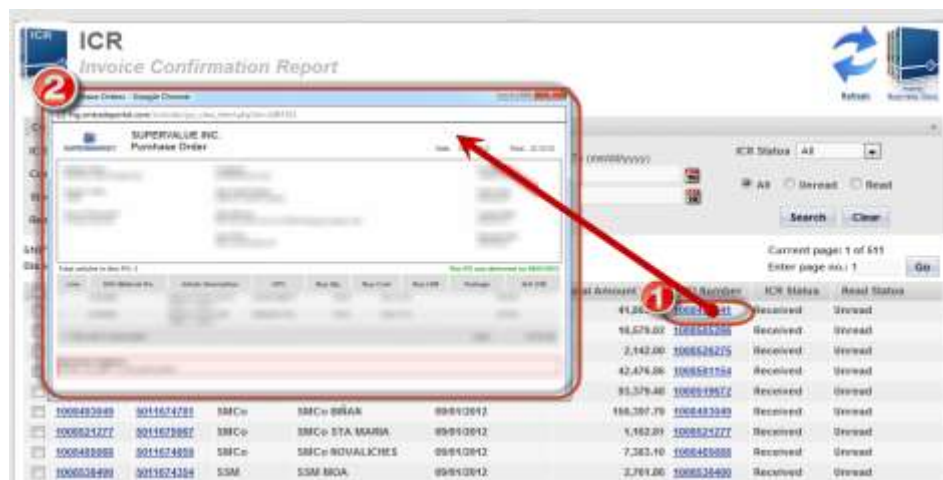
- To open the related PO document on Details Page, click the PO number located at the bottom part of the Detail Body Section and a pop-up window will appear showing the corresponding PO Details.
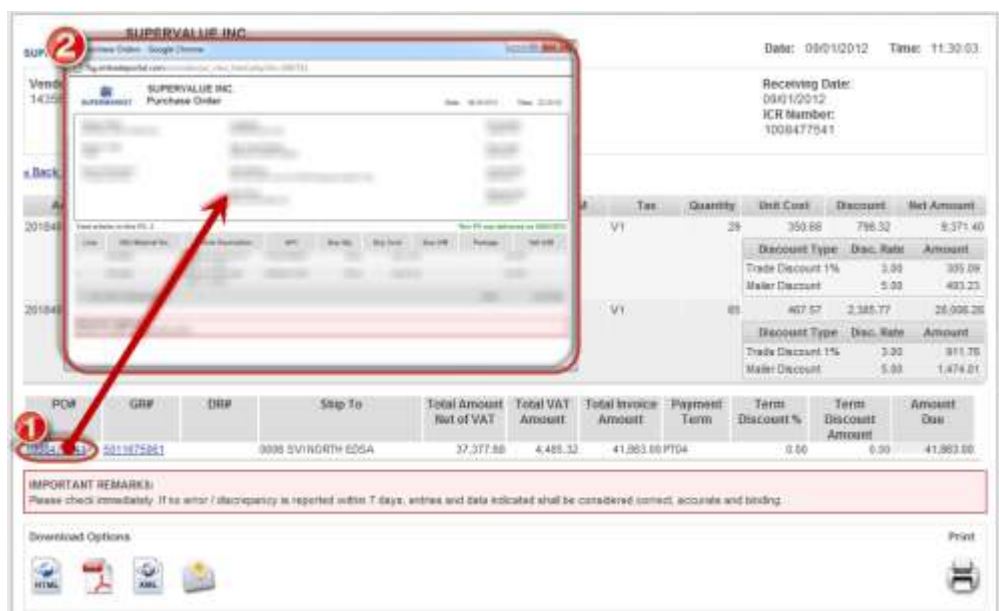
This will only be available if there is a corresponding PO on the portal. If there is none, the PO Number will not be clickable.

2.11.3.3 Returning to ICR Summary Page

To return to the summary page after opening a specific ICR Document, click "Back to ICR Summary" located at the Detail Count Section.
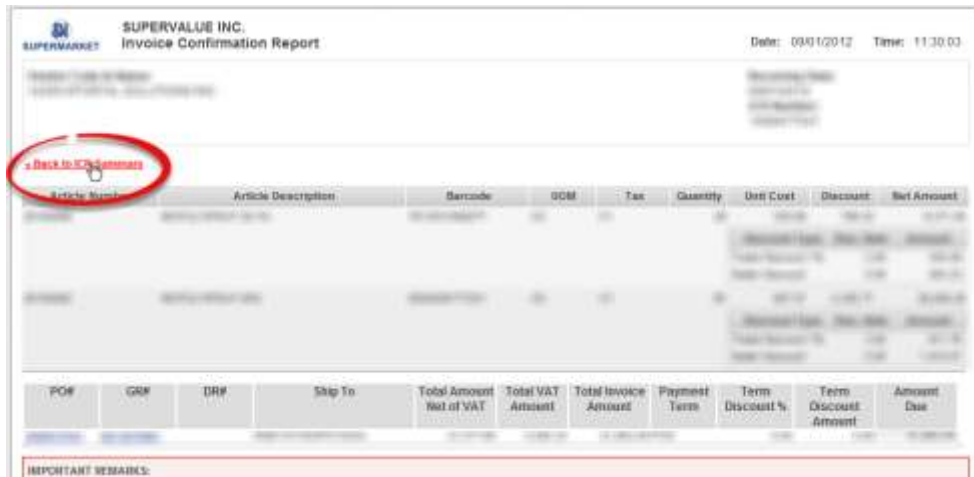
2.11.3.4 ICR Download Options & Printing

You may download a specific document /message currently shown in the Details Page in any of the following formats: HyperText Markup Language (.html), Portable Document Format (.pdf) or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

You may also print a specific document/message shown in the Details Page resembling the official business document/message.

- To print a specific document/message, click the print button on the Download Options & Printing Section and your browser's print preview page will be displayed. You may also input your preferred print settings.

2.11.3.5 Viewing ICR Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document /message was first viewed

3. Date and Time document /message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

   - To view the document history, click "View document history".

   - A pop-up box will show the document history for the opened ICR document.

2.12 ANNOUCEMENT FOR RETURN TO VENDOR (RTV)
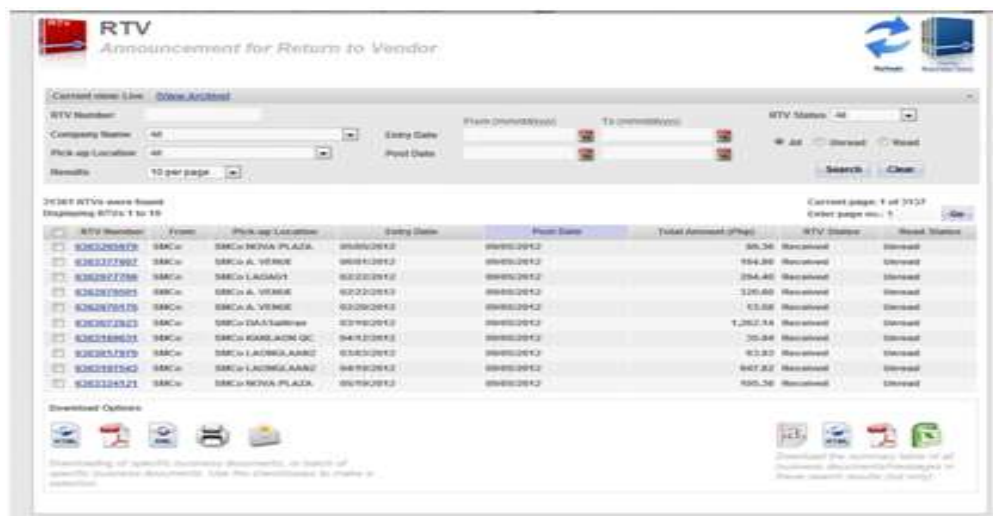
2.12.1 Accessing the RTV Summary Page

1. To access the Return to Vendor summary page, go to the BDMS home page then click the Return to Vendor button.

2. You are now on RTV summary page.

2.12.2 RTV Summary Page & RTV Archive Page

2.12.2.1 RTV Search Fields

You may search RTV using the following criteria:

a. RTV Number
b. Company Name
c. Pick-up Location
d. Number of Records to display per page(Results)
e. Entry Date, Post Date
f. Document Status (Received, Downloaded)
g. Read Status (Unread, Read)

To get more accurate results, you may combine the criteria when you search.

a. To search for RTVs by RTV Number

1. Key in the RTV number in the text box.

2. Then click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

> The maximum number of characters for RTV number is 35. The text box accepts numeric characters only and will search for RTV numbers containing the indicated number.

b. To search for RTVs by Company Name

1. Click the drop-down list then select a specific company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

c. To search for RTVs by Pick-up Location

1. Click the drop-down list then select a pick-up location or choose "All" to display all of them.

2. Click the Search button located at the right side.

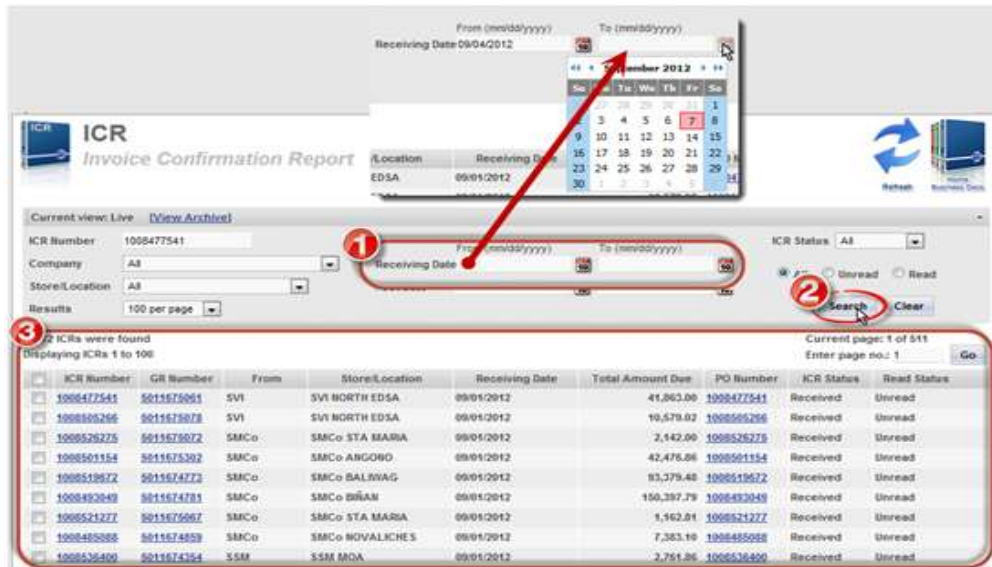3. After clicking the Search button, the table will display the results.

d. To filter the Number of Records to Display per page

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
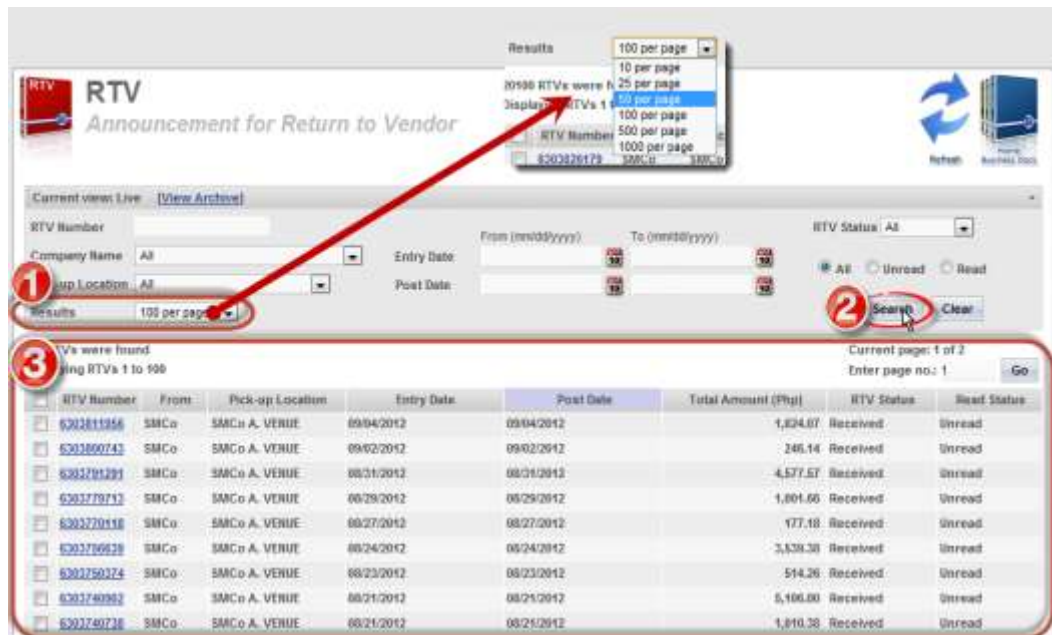
e. To search for RTVs by Entry Date, Post Date

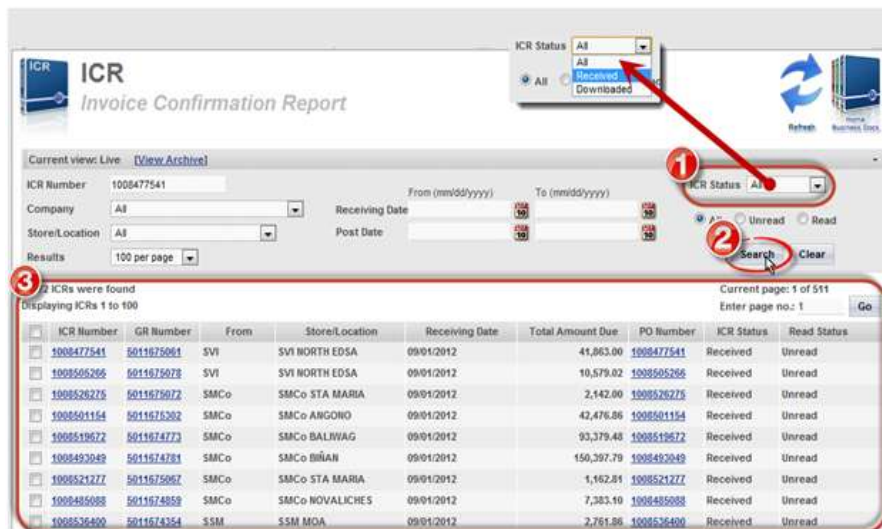1. You may manually key in Entry Date or Post Date using the format 'mm/dd/yyyy' or you may also select the dates using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

f. To search for RTVs by Document Status

1. Click the drop-down list then select a RTV status or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

g. To search for RTVs by Read Status

1. Choose a RTV status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

2.12.2.2 RTV Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered) (1) key in a specific page number (2) then hit the "Go" button; and, (3) the table will display the results.
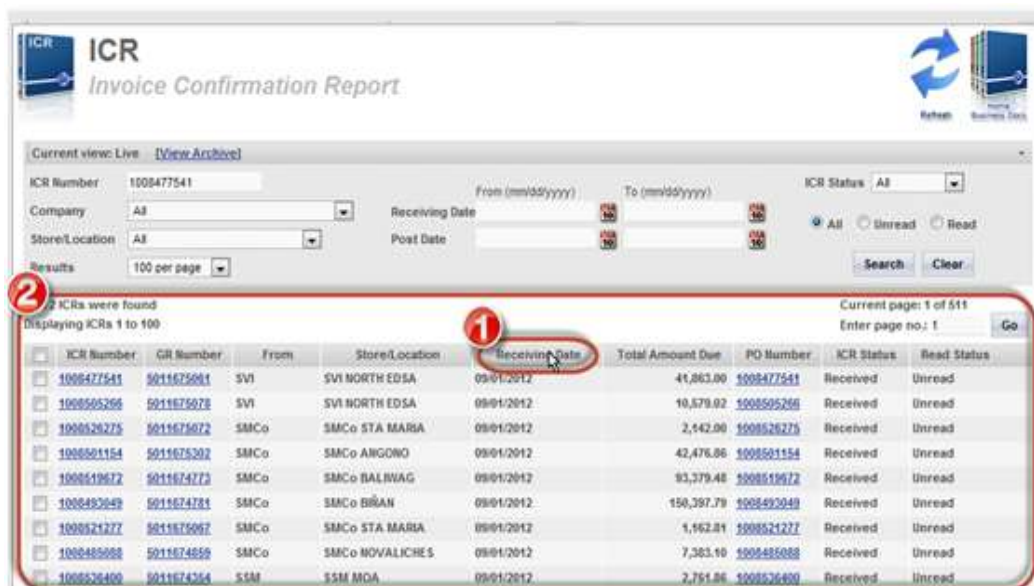

This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.12.2.3 Sorting RTV Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Post Date

2.12.3 RTV Details Page

2.12.3.1 Opening a Specific RTV Document

On the Search Results Section, click the RTV number of the specific RTV document you want to open.

After clicking the RTV number, you will be directed to its details page.
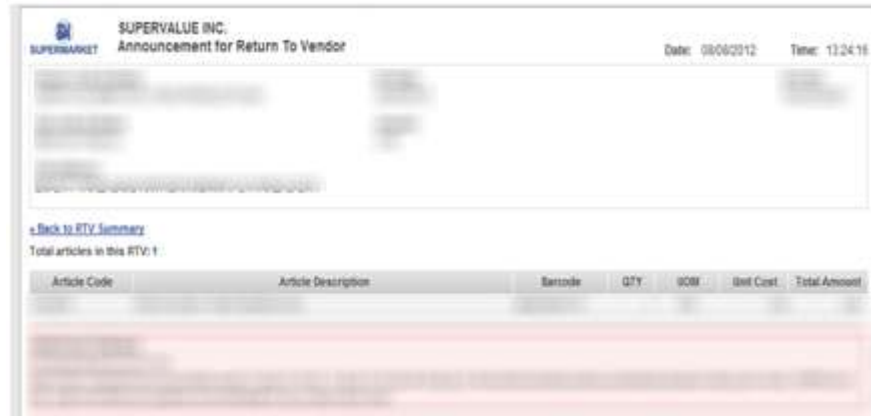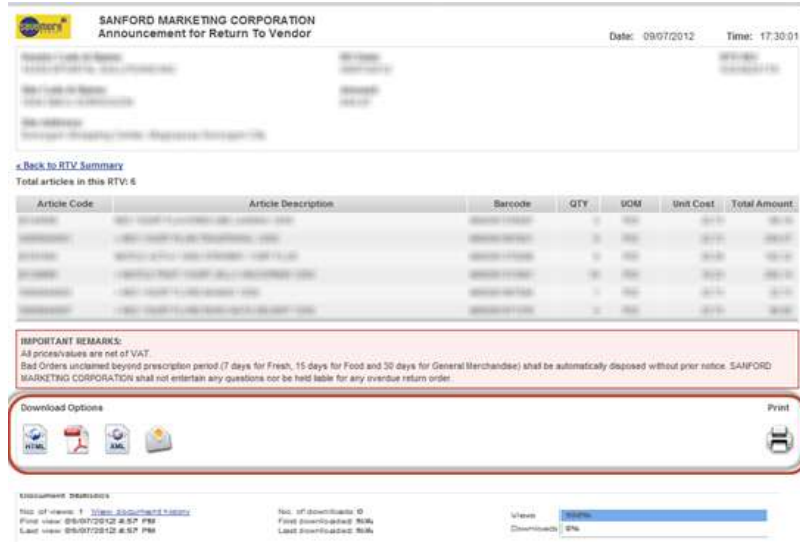
2.12.3.2 Returning to the RTV Summary Page

To return to the summary page after opening a specific RTV Document, just click "Back to RTV Summary" (if you have opened a document in "Live" view) or "Back to RTV Archive" (if you have opened a document in "Archive" view) located at the Detail Count Section.

2.12.3.3 RTV Download Options & Printing

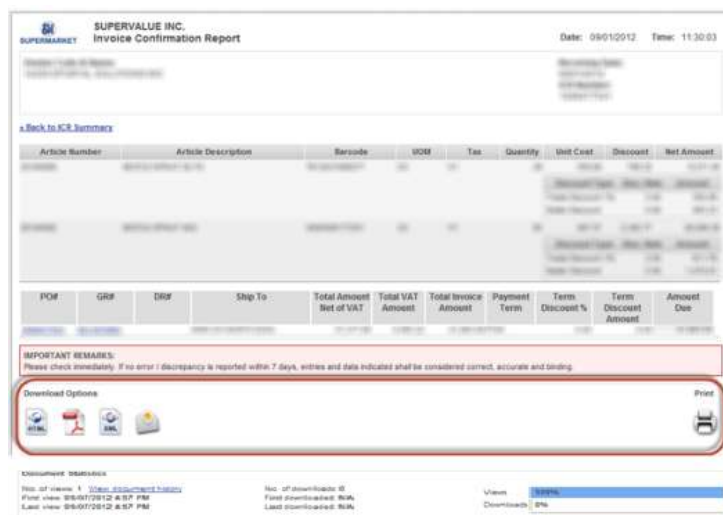You may download a specific document/message currently shown in the Details Page in any of the following format: HyperText Markup Language (.html), Portable Document Format (.pdf), or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.
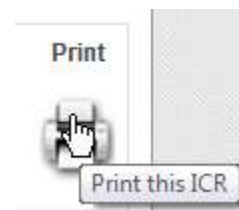

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

You may also print specific document/message shown in the Details Page resembling the official business document / message.

- To print a specific document / message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.
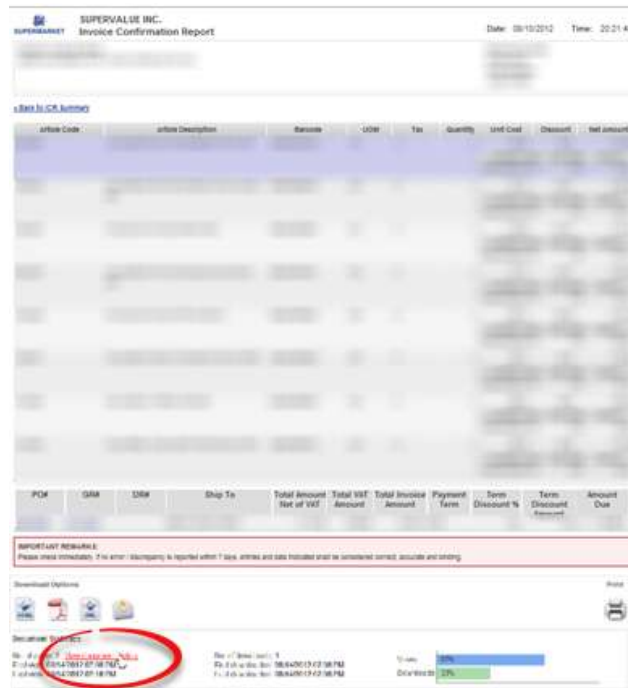

2.12.3.4 Viewing RTV Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

- To view the document history, click the "View document history".

- A pop-up box will show the document history for the opened RTV document.
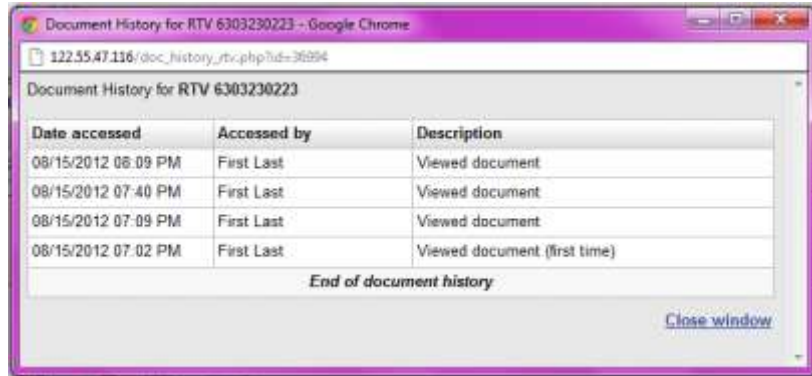
2.13 REMITTANCE ADVICE (RA)

2.13.1 Accessing RA Summary Page

1. To access the Remittance Advice summary page, on the BDMS home page, just click the Remittance Advice button.
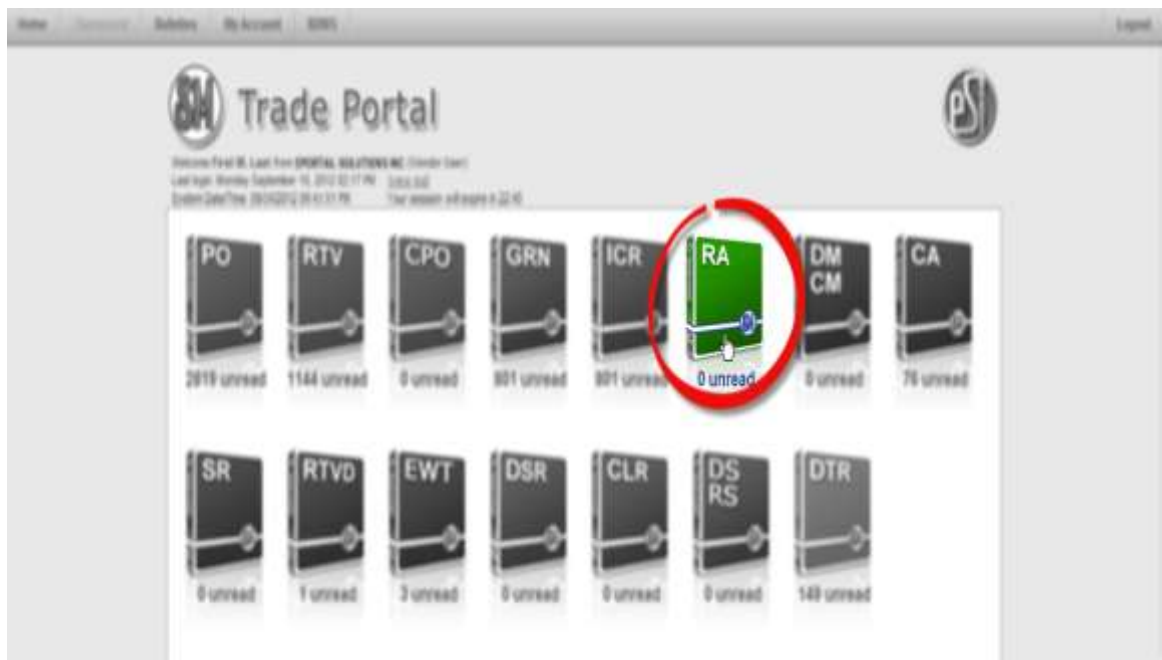
2. You are now on RA summary page.
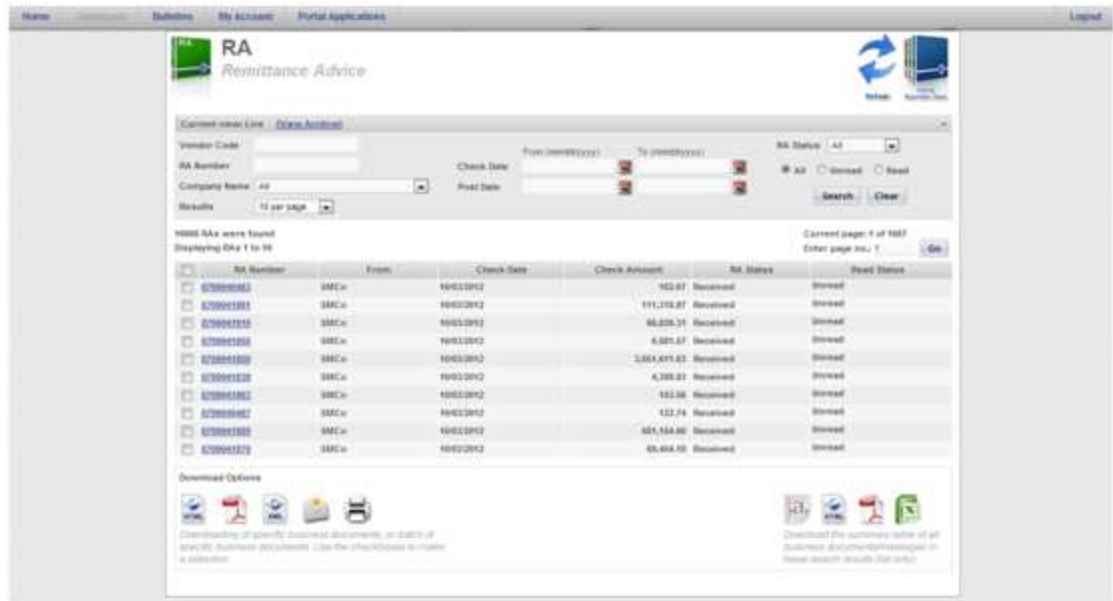
2.13.2 RA Summary Page & RA Archive Page

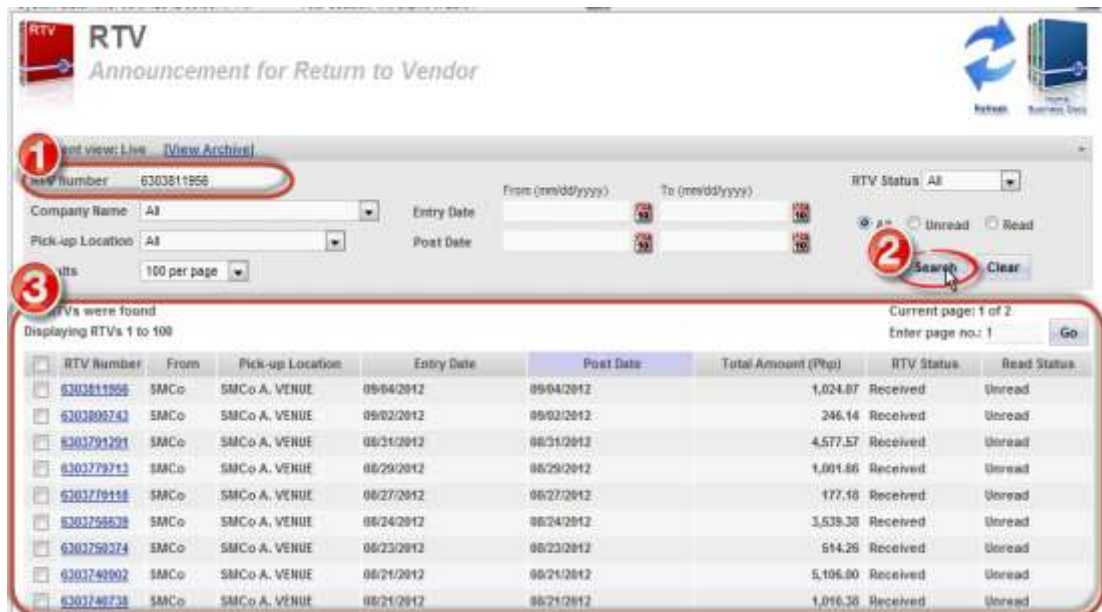### 2.13.2.1 RA Search Fields

You may search RA using the following criteria:

a. RA Number
b. Company Name
c. Number of Records to display per page(Results)
d. Check Date, Post Date
e. Document Status (Received, Downloaded)
f. Read Status (Unread, Read)

To get more accurate results, you may combine the criteria when you search.

a.   To search for RAs by RA Number

1. Key in the RA number in the text box.

2. Then click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

ℹ️ The maximum number of characters for RA number is 10. The text box accepts numeric characters only and will search for RA numbers containing the indicated number.

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b. To search for RAs by Company Name

1. Click the drop-down list then select a specific company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

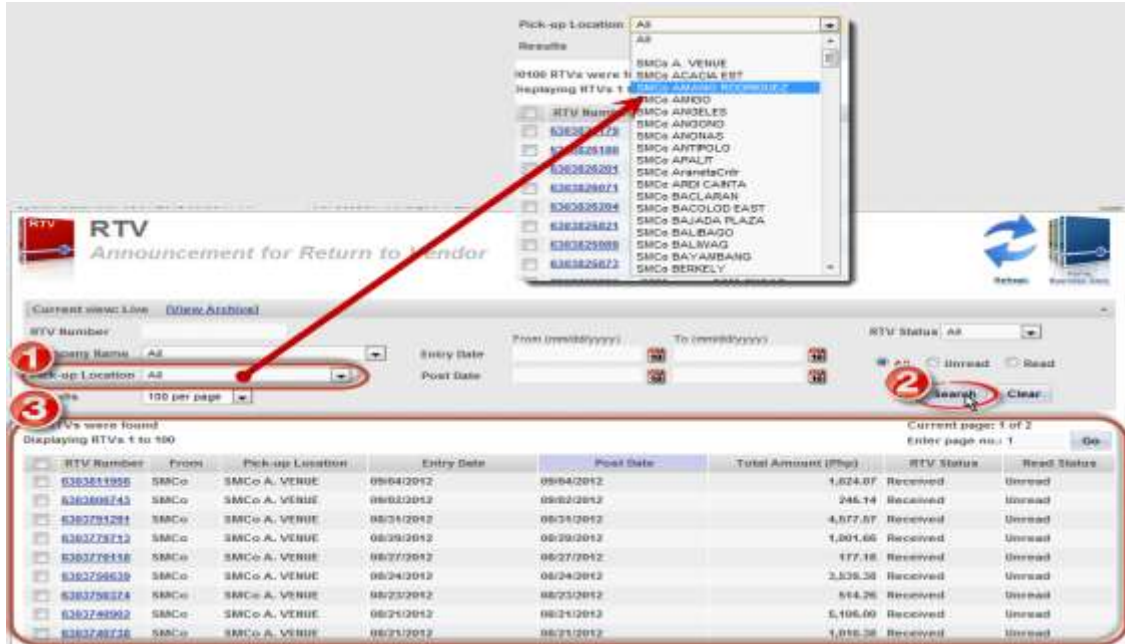3. After clicking the Search button, the table will display the results.

c. To filter the Number of Records to Display per page

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

d. To search for RAs using their Check Date, Post Date

1. Manually key in the Check Date or Post Date using the format 'mm/dd/yyyy' or you may also select the dates using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
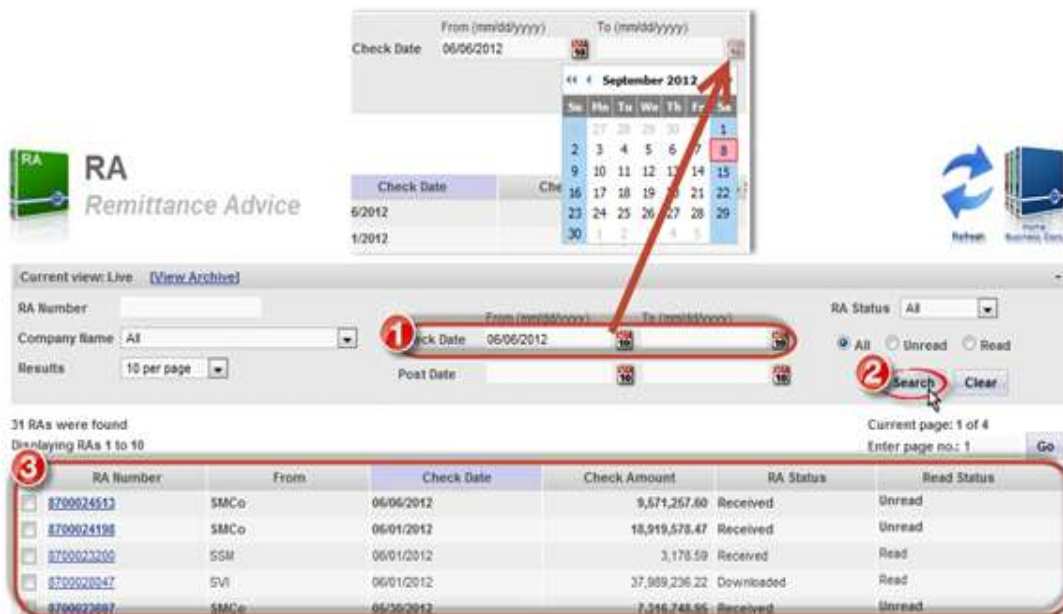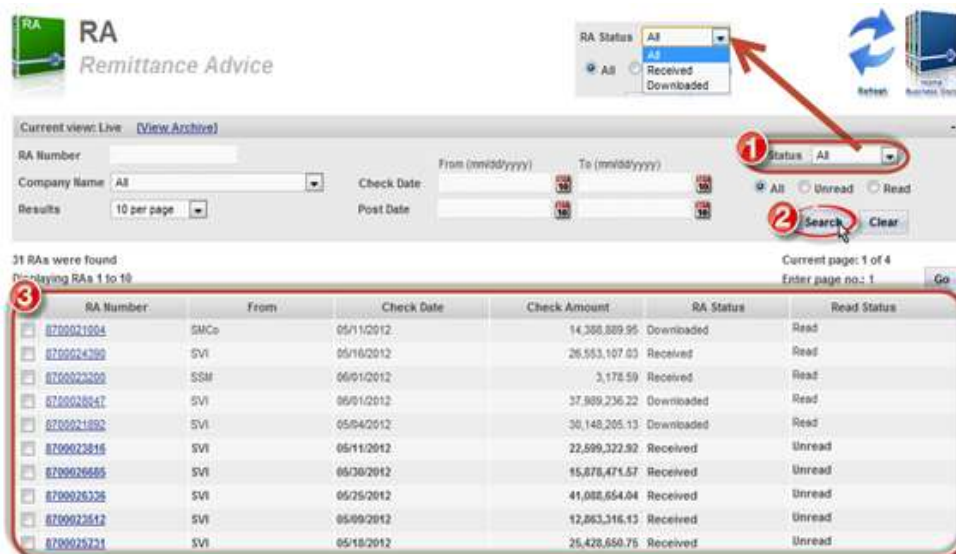
The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

e. **To search for RAs by Document Status**

1. Click the drop-down list then select a RTV status or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
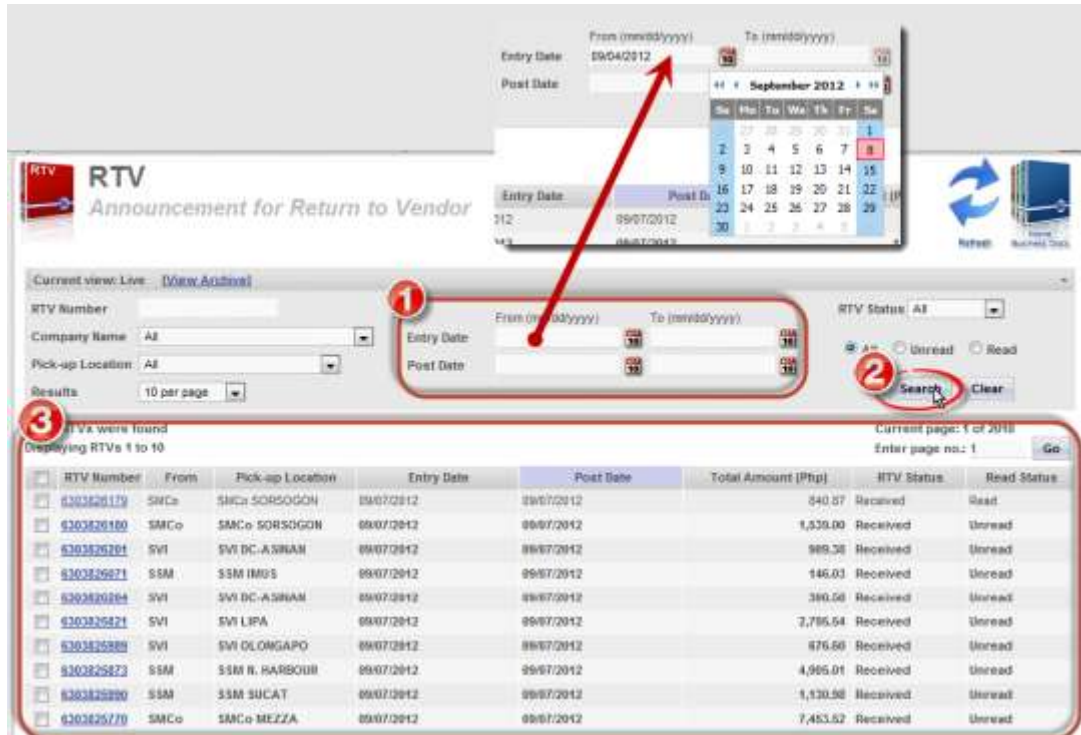

f. **To search for RAs by Read Status**

1. Choose a RA status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

2.13.2.2 RA Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered) (1) key in a specific page number (2) then hit the "Go" button; and, (3) the table will display the results.

> This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.13.2.3 Sorting RA Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Check Date

2.13.3 RA Details Page

2.13.3.1 Opening a Specific RA Document

On the Search Results Section, click the RA number of the specific RA document you want to open.

After clicking the RA number, you will be directed to its details page.

2.12.3.2 Returning to RA Summary Page

To return to the summary page after opening a specific RA Document, just click "Back to RA Summary" located at the Detail Count Section.
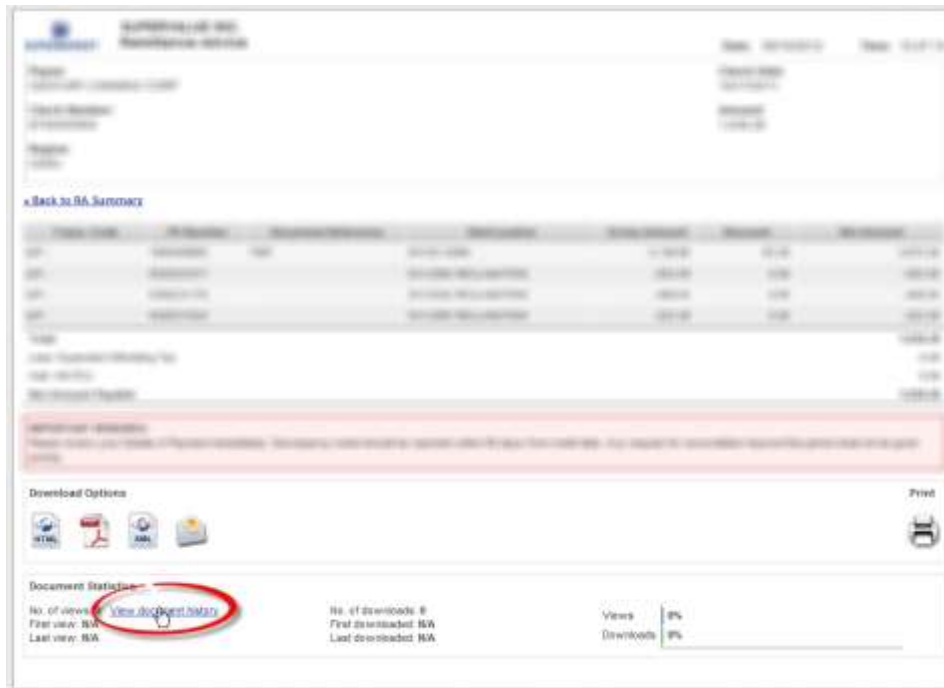
2.13.3.3 RA Download Options & Printing

You may download a specific document/message currently shown in the Details Page in any of the following format: Hyper Markup Language (.html), Portable Document Format (.pdf), or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

You may also print specific document/message shown in the Details Page resembling the official business document / message.

- To print a specific document / message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.

2.13.3.4 Viewing RA Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

   - To view the document history, click the "View document history".

   - A pop-up box will show the document history for the opened RA document.
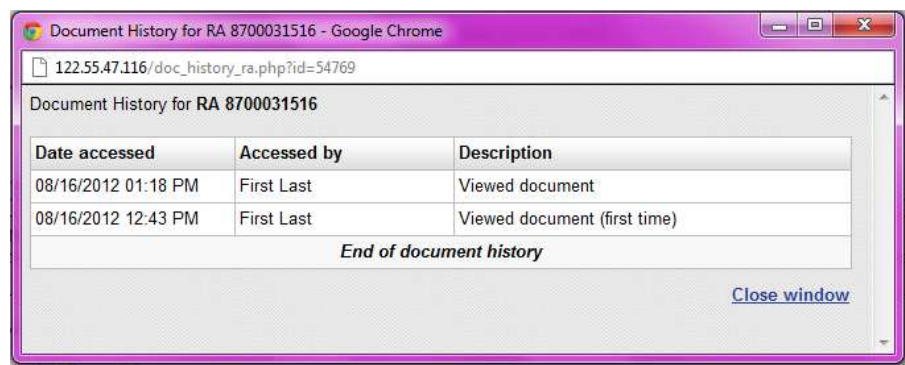
2.14 DEBIT MEMO / CREDIT MEMO (DMCM)

2.14.1 Accessing DMCM Summary Page

1. To access the DMCM summary page, go to the BDMS home page then click the
    DMCM button.

2. You are now on the DMCM summary page.

2.14.2 DMCM Summary Page & DMCM Archive Page

2.14.2.1 DMCM Search Fields

You may search DMCM using the following criteria:
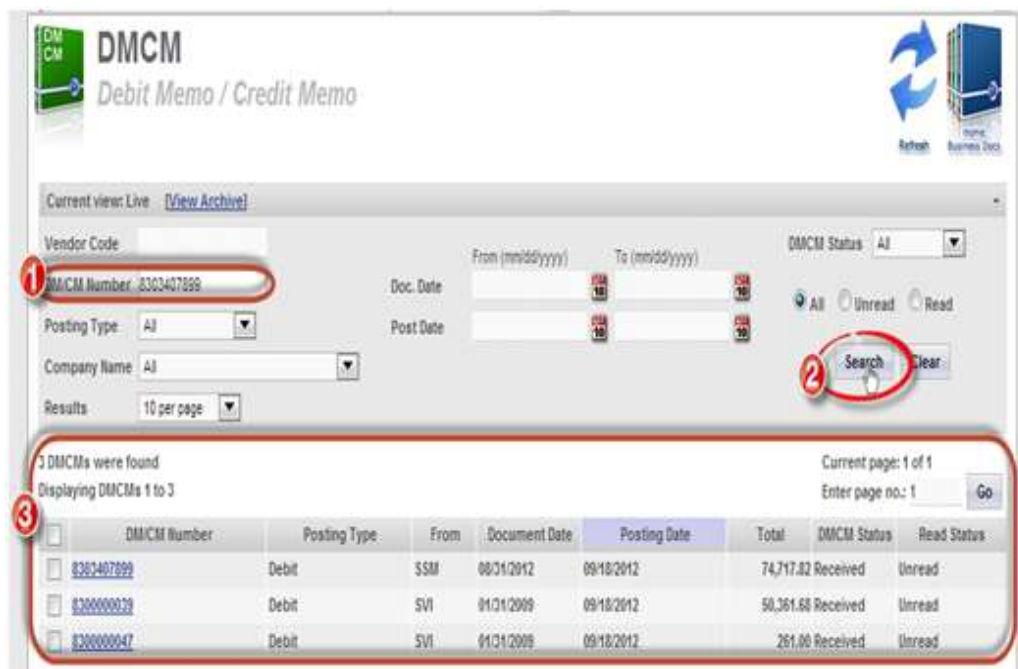
a. DM/CM Number
b. Posting Type (DM's only, CM's only)
c. Company Name
d. Number of Records to display per page(Results)
e. Document Date, Post Date
f. Document Status (Received, Downloaded)
g. Read Status (Unread, Read)

> *i* To get more accurate results, you may combine the criteria when you search.

a. To search for DMCMs by DM/CM Number

1. Key in the DM/CM number in the text box.

2. Then click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

> ℹ️ The maximum number of characters for DM/CM number is 10. The text box accepts numeric characters only and will search for DM/CM Numbers containing the indicated number.

b. To search for DMCMs by Posting Type

1. Click the drop-down list then select a posting type or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

c. To search for DMCMs by Company Name

1. Click the drop-down list then select a specific company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

d. To filter the Number of Records to Display per page

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
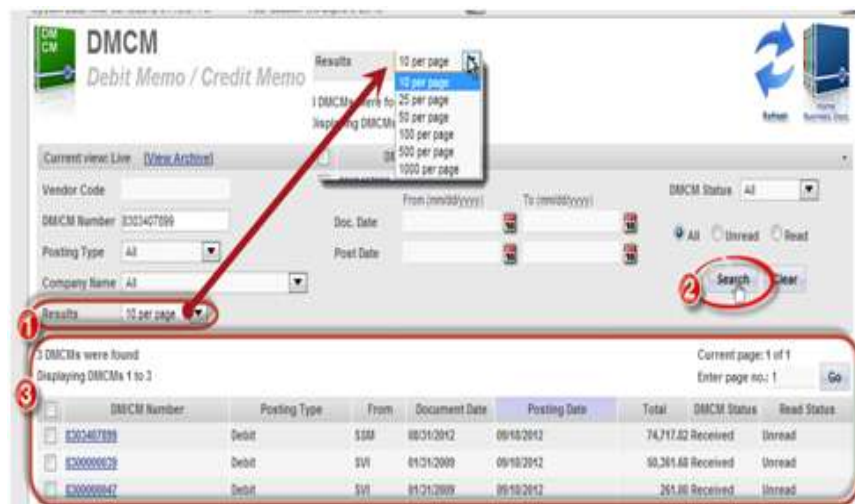
e. To search for DMCMs by Document Date, Post Date

1. Manually key in the Document Date or Post Date using the format 'mm/dd/yyyy' or you may also select a date using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
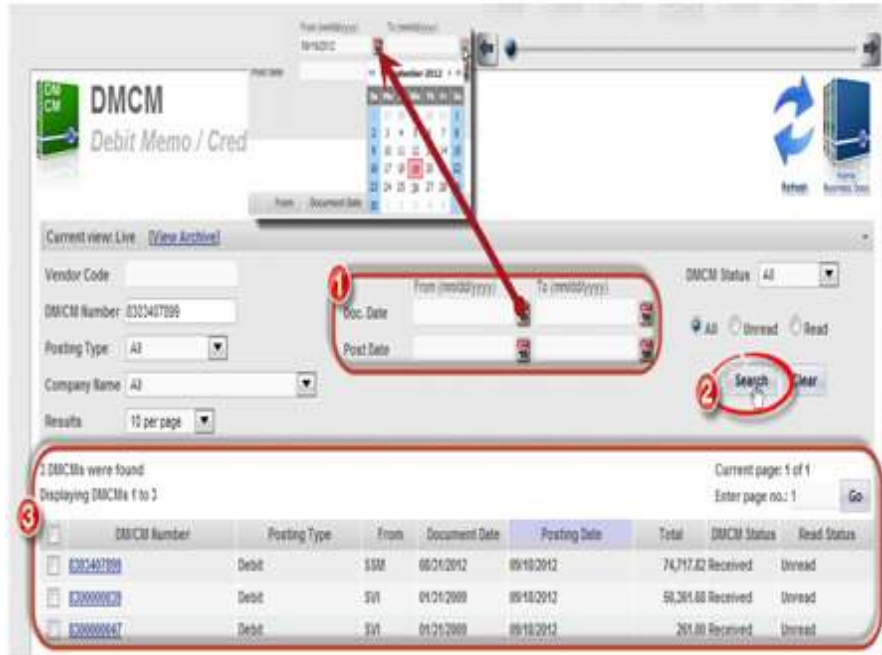
 The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

f. To search for DMCMs by Document Status

1. Click the drop-down list then select a DMCM status or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

g. To search for DMCMs by Read Status

1. Choose a DMCM status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
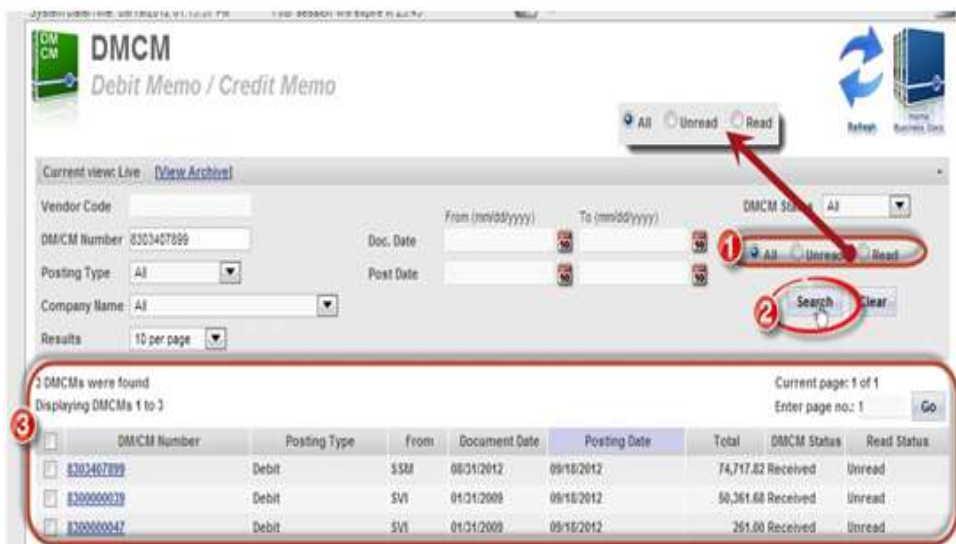
2.14.2.2 DMCM Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered) (1) key in a specific page number (2) then hit the "Go" button: and, (3) the table will display the results.

i This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.14.2.3 Sorting DMCM Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Posting Date

2.14.3 DMCM Details Page

2.14.3.1 Opening a Specific DMCM Document

On the Search Results Section, click the DM/CM number of the specific DMCM document you want to open.

After clicking the DM/CM number, you will be directed to its details page.

2.14.3.2 Returning to DMCM Summary Page

To return to the summary page after opening a specific DMCM Document, just click "Back to DMCM Summary" located at the Detail Count Section.
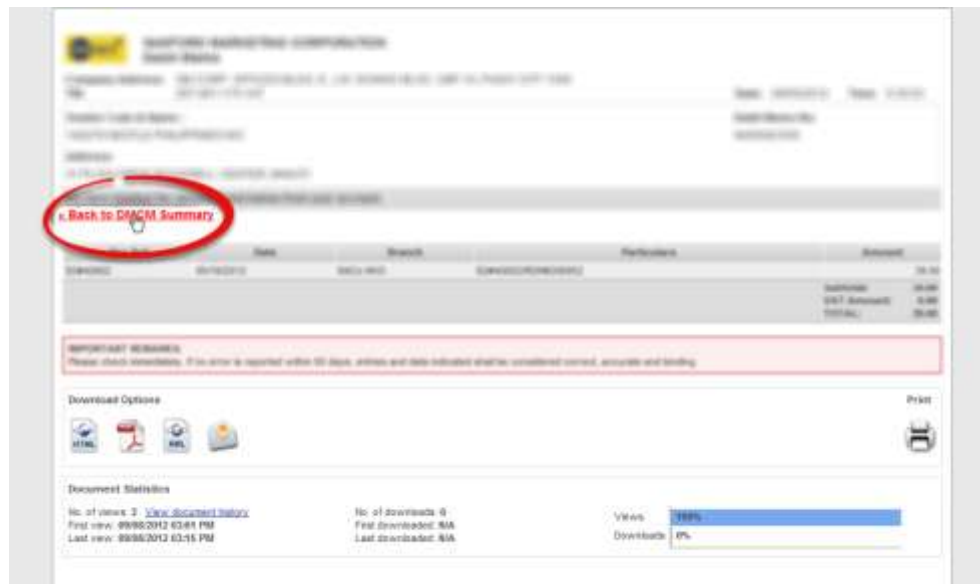
2.14.3.3 DMCM Download Options & Printing

You may download a specific document/message currently shown in the Details Page in any of the following format: Hyper Markup Language (.html), Portable Document Format (.pdf) or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

You may also print specific document/message shown in the Details Page resembling the official business document/message.

- To print a specific document / message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.

2.14.3.4 Viewing DMCM Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

   - To view the document history, click the "View document history".

- A pop-up box will show the document history for the opened DMCM document.

2.15 CREDIT ADVICE (CA)

2.15.1 Accessing CA Summary Page

1. To access the Credit Advice summary page, go to the BDMS home page and then click the Return to Credit Advice button.

2. You are now at the CA summary page.
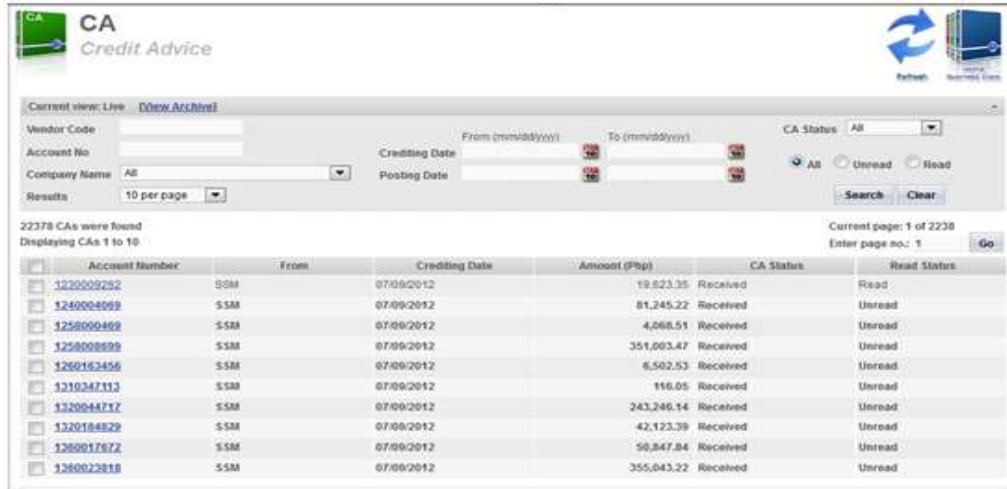
2.15.2 CA Summary Page & CA Archive Page

2.15.2.1 CA Search Fields

You may search CA using the following criteria:

a. Account Number
b. Company Name
c. Number of Records to display per page(Results)
d. Crediting Date, Posting Date
e. Document Status (Received, Downloaded)
f. Read Status (Unread, Read)

To get more accurate results, you may combine the criteria when you search.

a. **To search for CAs by Account number**

1. Key in the Account number in the text box.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
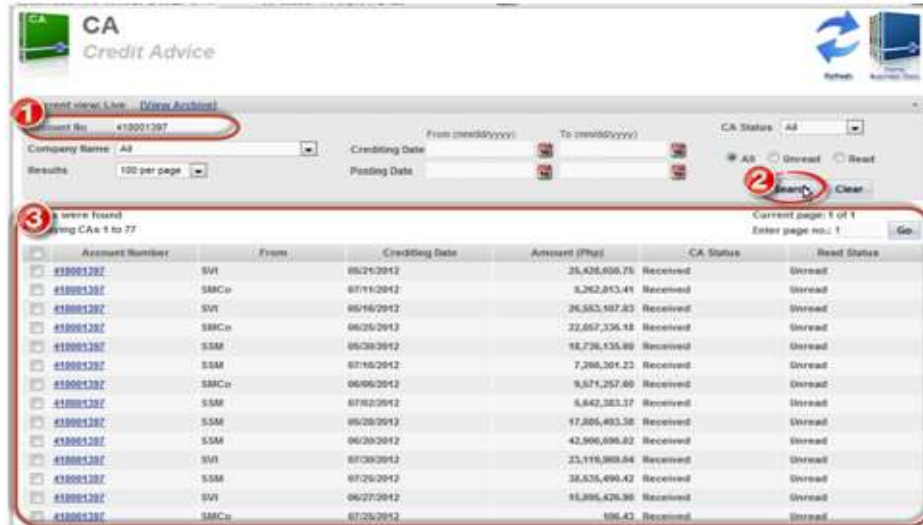
The maximum number of characters for Account number is 15. The text box accepts numeric characters only and will search for Account Numbers containing the indicated number.

b. To search for CAs by Company Name

1. Click the drop-down list then select a specific company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

c. To filter the Number of Records to Display per page

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
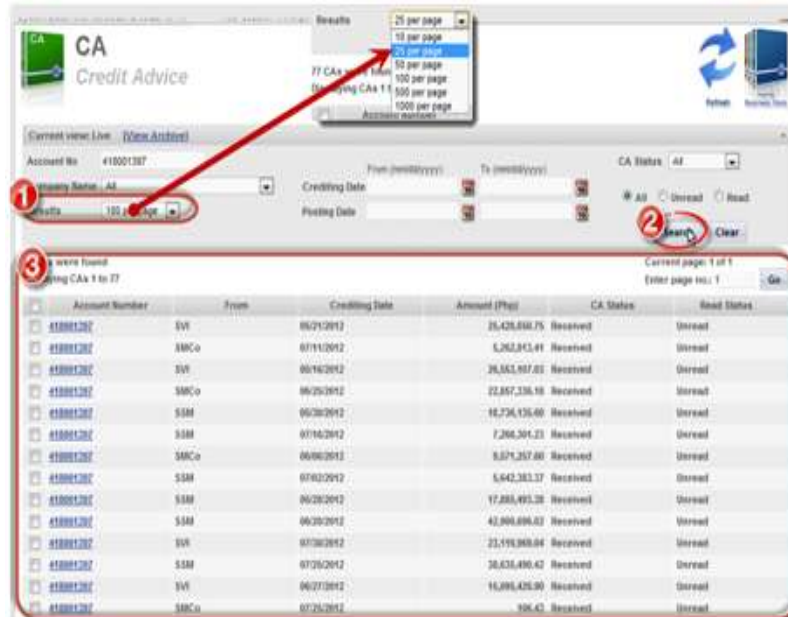
d. To search for CAs by Crediting Date, Posting Date

1. Manually key in the Crediting Date or Posting Date using the format 'mm/dd/yyyy' or you may also select a date using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

e. To search for CAs by Document Status

1. Click the drop-down list then select a CA status or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

f. To search for CAs by Read Status

1. Choose a CA status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right side.

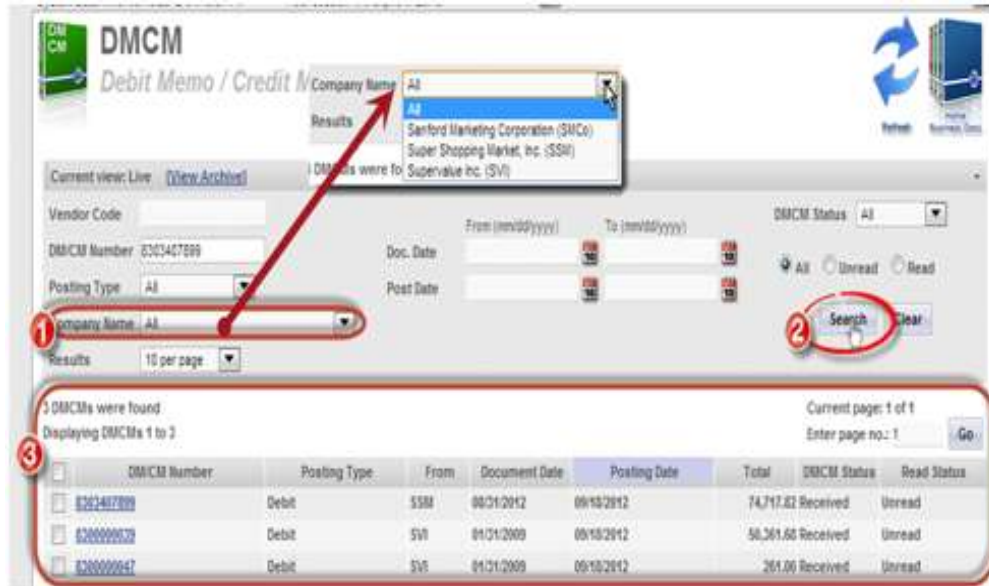3. After clicking the Search button, the table will display the results.

2.15.2.2 CA Page Mark

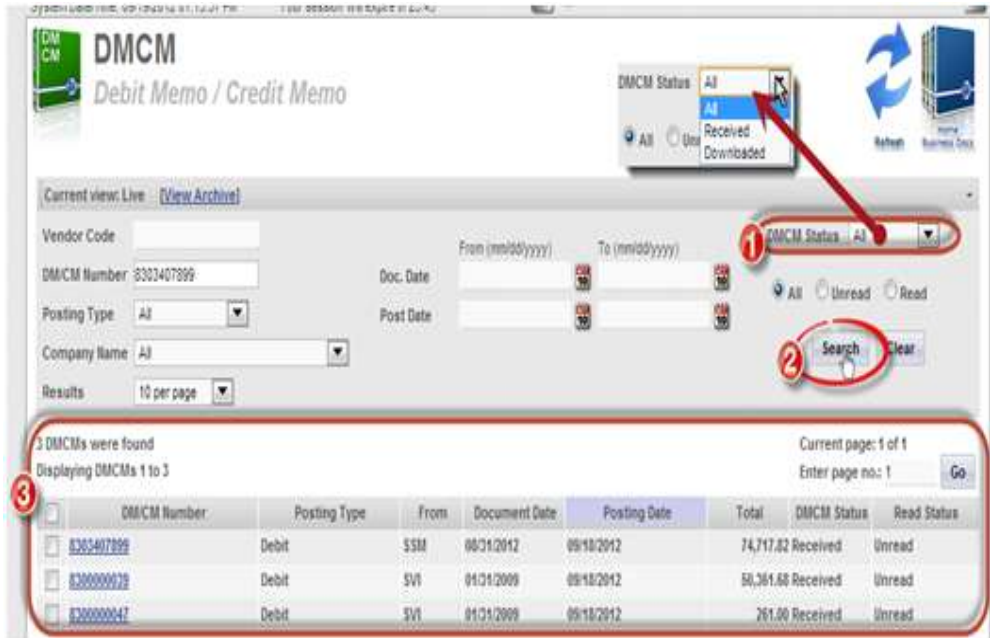This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered) (1) key in a specific page number (2) then hit the "Go" button; and, (3) the table will display the results.

This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.15.2.3 Sorting CA Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Crediting Date

2.15.3 CA Details Page

2.15.3.1 Opening a Specific CA Document

On the Search Results Section, click the Account number of the specific CA document you want to open.

After clicking the Account number, you will be directed to its Details page.

2.15.3.2 Returning to CA Summary Page

To return to the summary page after opening a specific CA Document, click "Back to CA Summary" located at the Header Section.
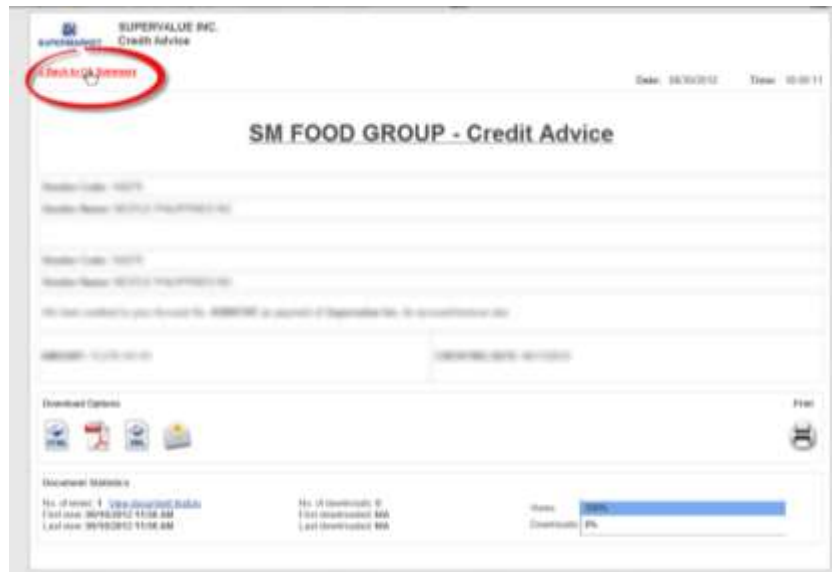
2.15.3.3 CA Download Options & Printing

You may download a specific document/message currently shown in the Details Page in any of the following format: Hyper Markup Language (.html), Portable Document Format (.pdf) and Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

You may also print specific document/message shown in the Details Page resembling the official business document/message.

- To print a specific document / message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.

2.15.3.4 Viewing CA Document History
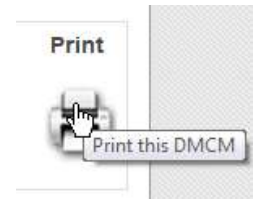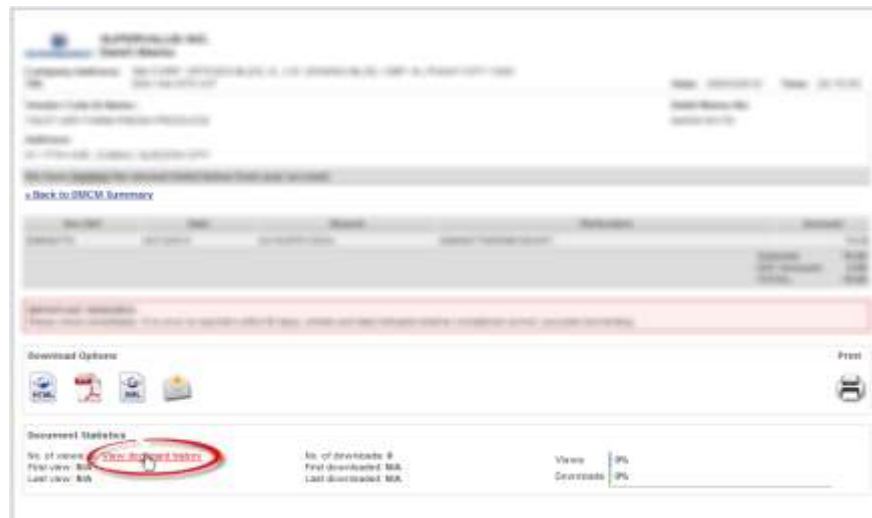
The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

   - To view the document history, click "View document history".

- A pop-up box will show the document history for the opened CA document.
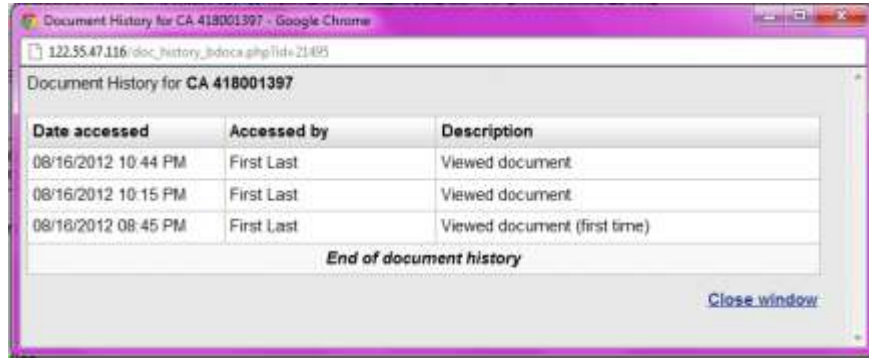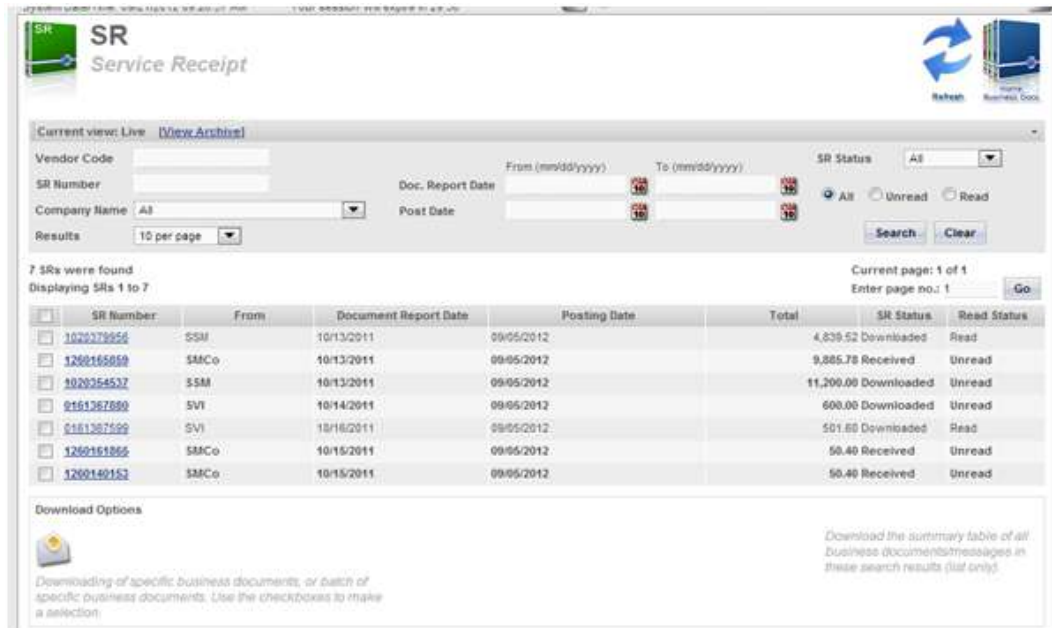
2.16 SERVICE RECEIPT (SR)

2.16.1 Accessing SR Summary Page

1. To access the Service Receipt summary page, go to the BDMS home page and then click the Service Receipt button.

2. You are now at the SR summary page.

2.16.2 SR Summary Page & SR Archive Page

2.16.2.1 SR Search Fields

You may search SR using the following criteria:

a. SR Number
b. Company Name
c. Number of Records to display per page(Results)
d. Document Report Date, Post Date
e. Document Status (Received, Downloaded)
f. Read Status (Unread, Read)

 To get more accurate results, you may combine the criteria when you search.

a. To search for SRs by SR Number
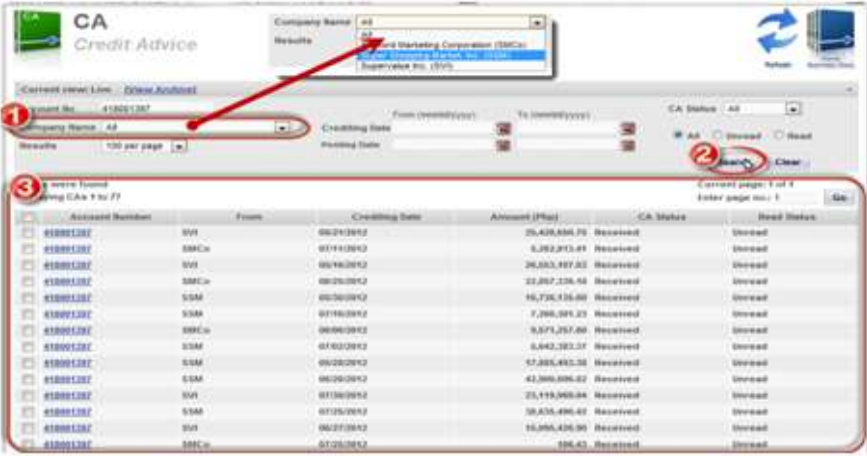
1. Key in the SR number in the text box.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

The maximum number of characters for SR number is 10. The text box accepts numeric characters only and will search for SR Numbers containing the indicated number.

b. To search for SRs by Company Name

1. Click the drop-down list then select a specific company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
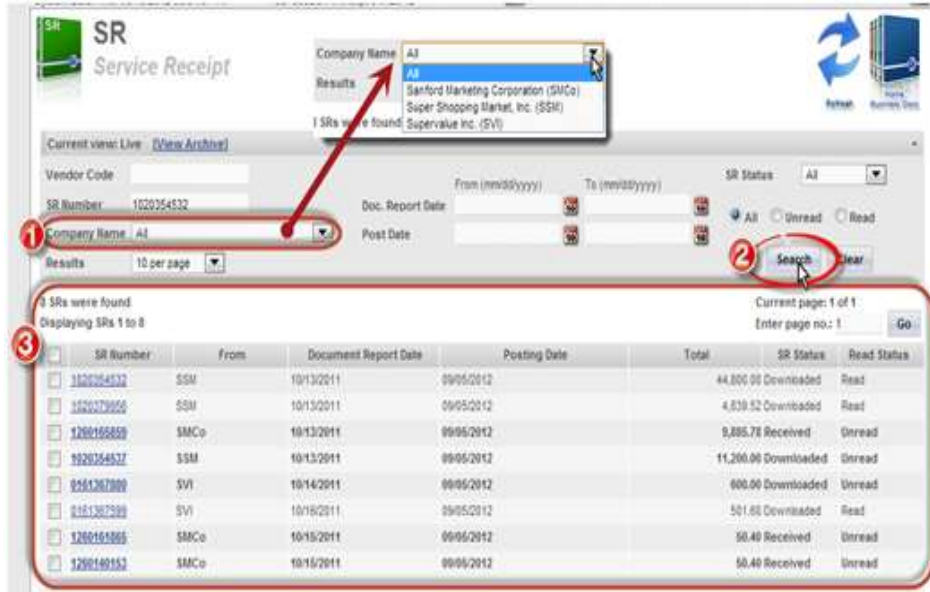
c. **To filter the Number of Records to Display per page**

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

.
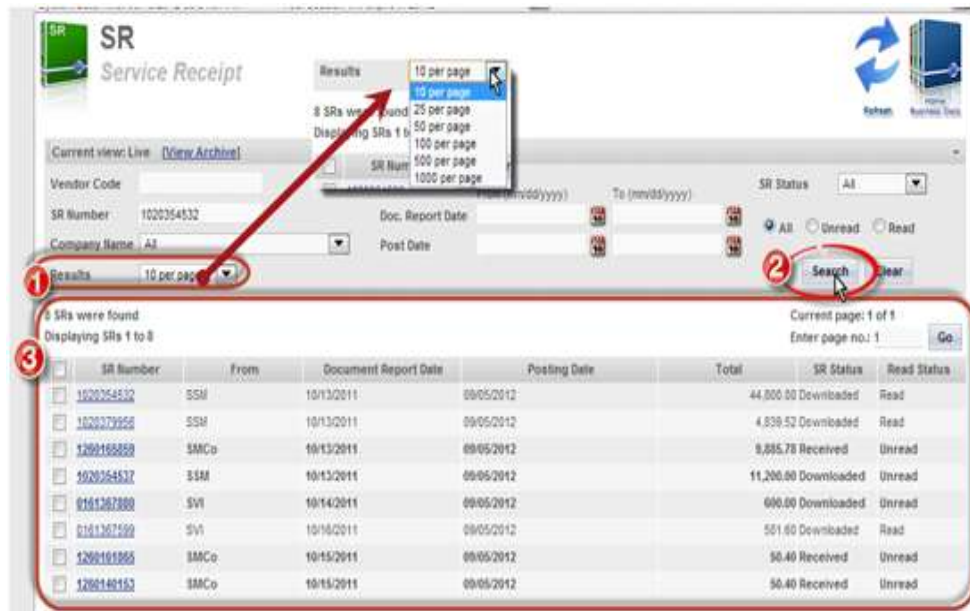
d. To search for SRs by Document Report Date, Post Date

1. Manually key in the Document Report Date or Post Date using the format 'mm/dd/yyyy' or you may also select the dates using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

e. To search for SRs by Document Status:

1. Click the drop-down list then select a SR status or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

f. To search for SRs by Read Status

1. Choose a SR status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
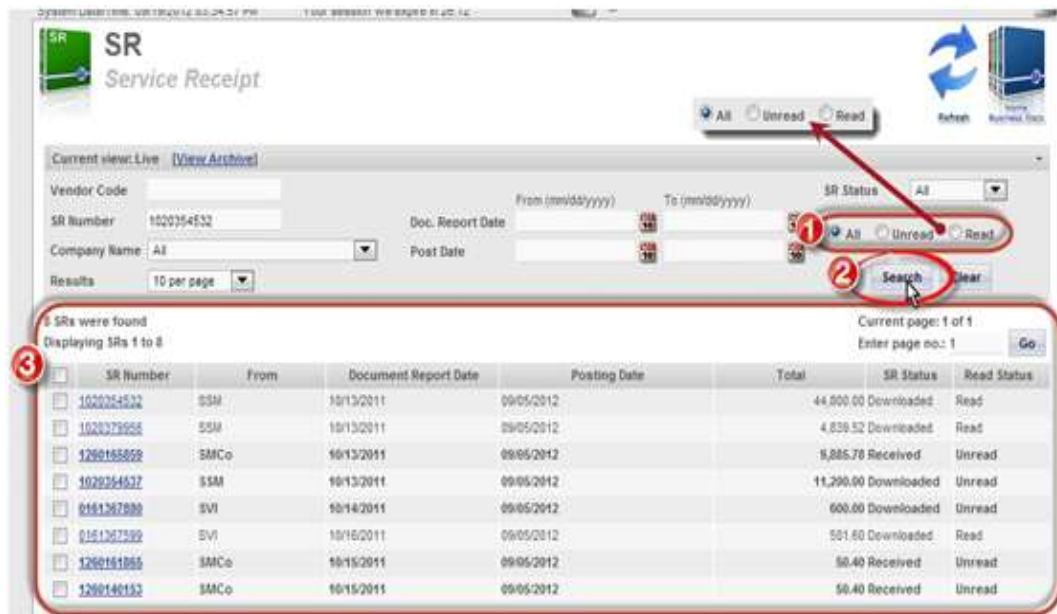
2.16.2.2 SR Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered), (1) key in a specific page number (2) then hit the "Go" button; and (3) the table will display the results.
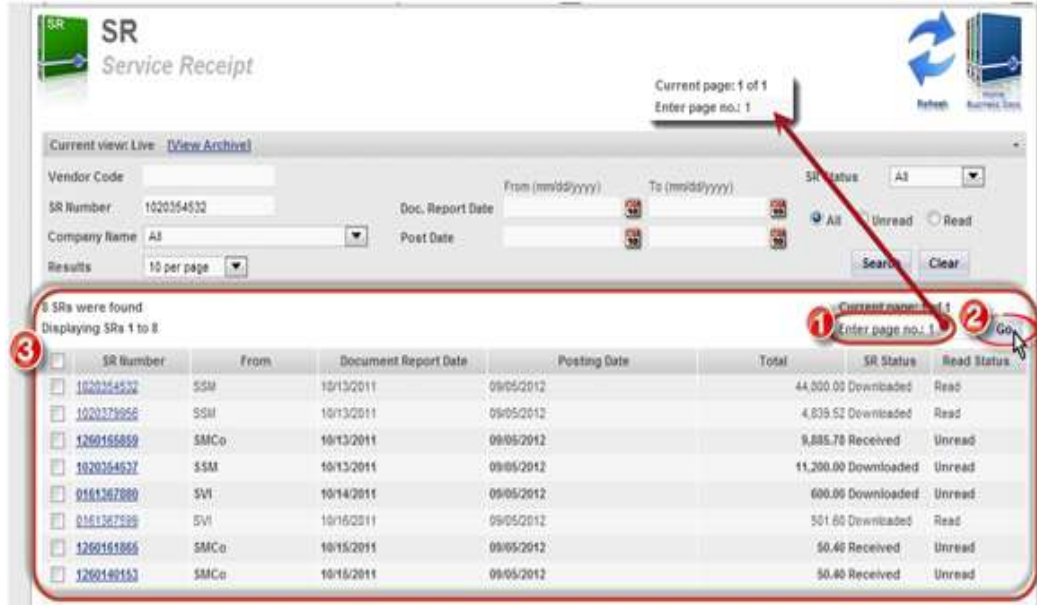
This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.16.2.3 Sorting SR Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Posting Date
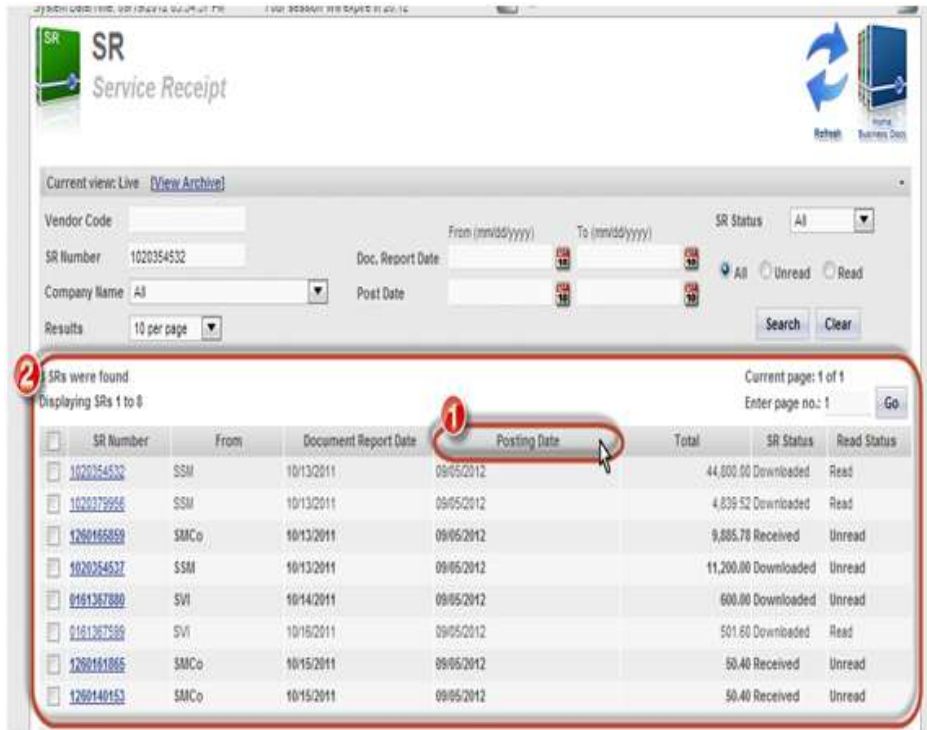
2.16.3 SR Details Page

2.16.3.1 Opening a Specific SR Document

On the Search Results Section, click the SR number of the specific SR document you want to open.
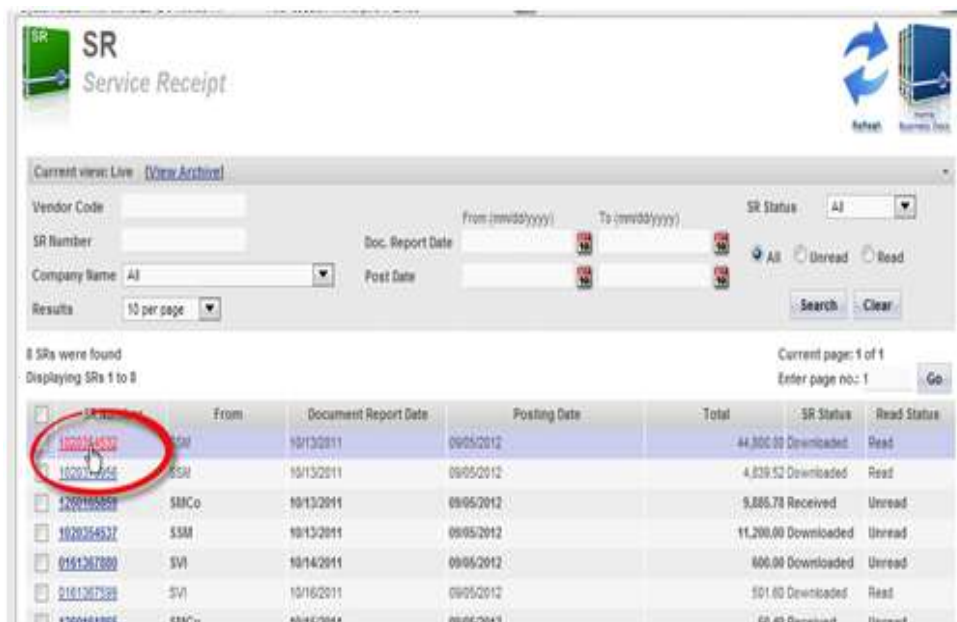
After clicking the SR number, you will be directed to its Details page.

2.16.3.2 Returning to SR Summary Page

To return to the summary page after opening a specific SR Document, click "Back to SR Summary" located at the Detail Count Section.

2.16.3.3 SR Download Options & Printing

You may download a specific document/message currently shown in the Details Page in the following format: Hyper Markup Language (.html), Portable Document Format (.pdf) or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

Download Options

You may also print specific document/message shown in the Details Page resembling the official business document/message.

- To print a specific document/message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.

Print

2.16.3.4 Viewing SR Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

   - To view the document history, click the "View document history".

- A pop-up box will show the document history for the opened SR document.
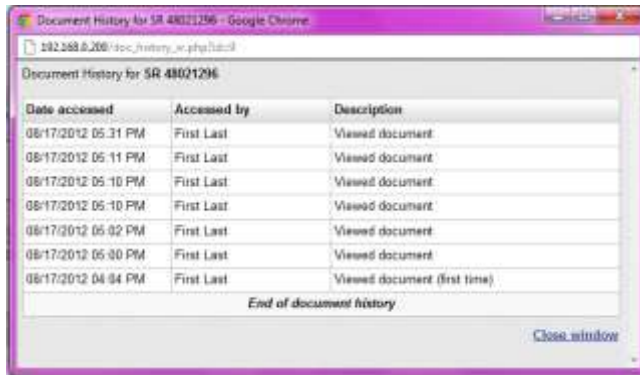
2.17 RETURN TO VENDOR DEDUCTION (RTVD)

2.17.1 Accessing RTVD Summary Page

1. To access the Return to Vendor Deduction summary page, go to the BDMS home page and then click the Return to Vendor Deduction button.

2. You are now at the RTVD summary page.
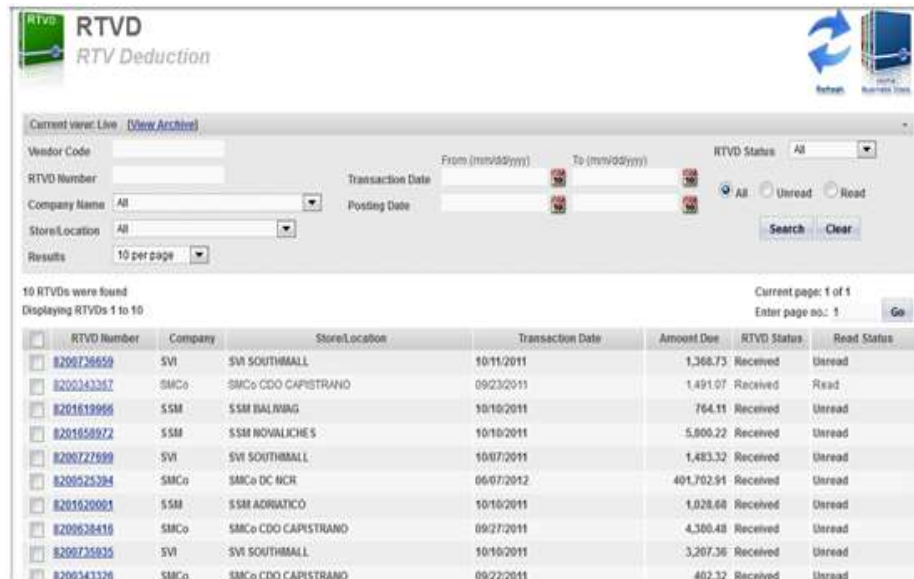
2.17.2 RTVD Summary Page & RTVD Archive Page

2.17.2.1 RTVD Search Fields

You may search RTVD using the following criteria:

a. RTVD Number
b. Company Name
c. Store/Location
d. Number of Records to display per page(Results)
e. Transaction Date, Posting Date
f. Document Status (Received, Downloaded)
g. Read Status (Unread, Read)

To get more accurate results, you may combine the criteria when you search.

a. To search for RTVDs by RTVD Number

1. Key in the RTVD number in the text box.

2. Then click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
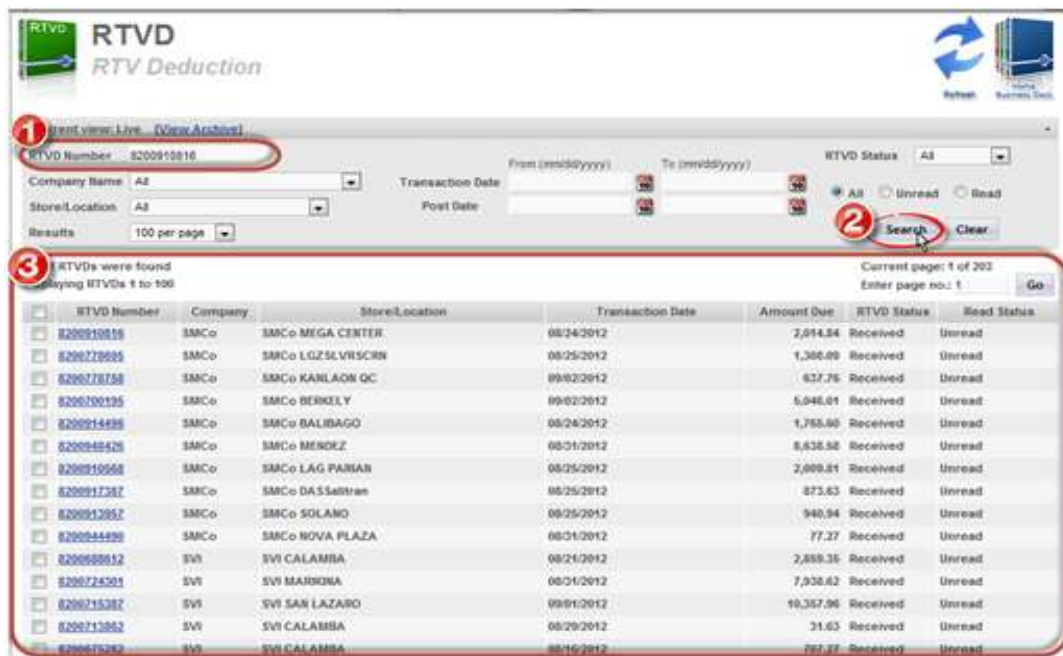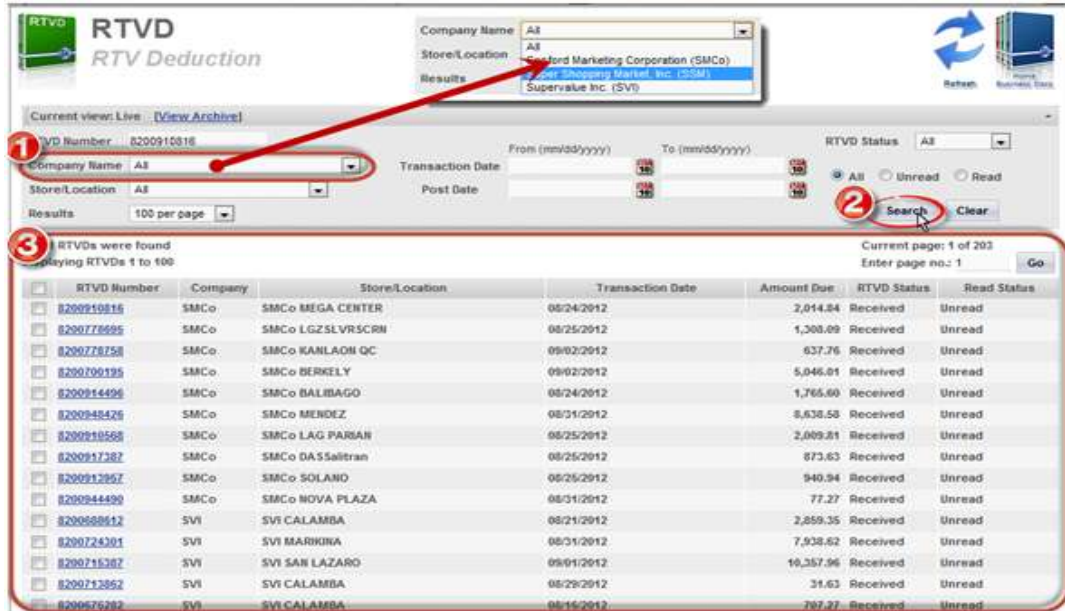
The maximum number of characters for RTVD number is 10. The text box accepts numeric characters only and will search for RTVD numbers containing the indicated number.

b. To search for RTVDs by Company Name

1. Click the drop-down list then select a specific company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

c. To search for RTVDs by Store/Location

1. Click the drop-down list then select a store/location or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
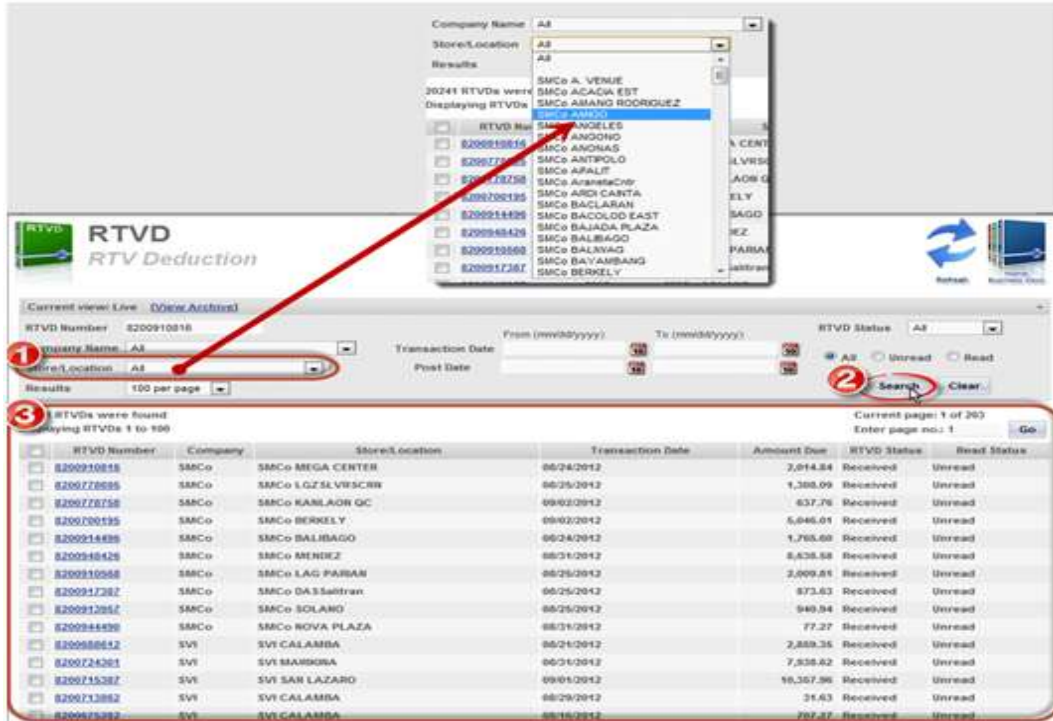
d. To filter the Number of Records to Display per page

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

e.   To search for RTVDs by Transaction Date, Posting Date

1.   Manually key in the Transaction Date or Posting Date using the format 'mm/dd/yyyy' or you may also select a date using the calendar.

2.   Click the Search button located at the right side.

3.   After clicking the Search button, the table will display the results.
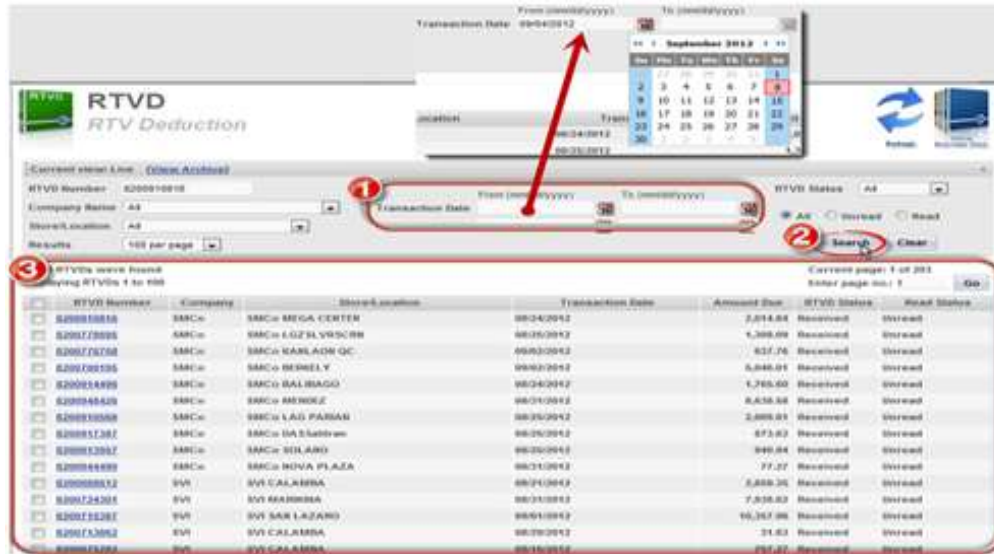
The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

f.   To search for RTVDs by Document Status

1.   Click the drop-down list then select a RTVD status or choose "All" to display all of them.

2.   Click the Search button located at the right side.

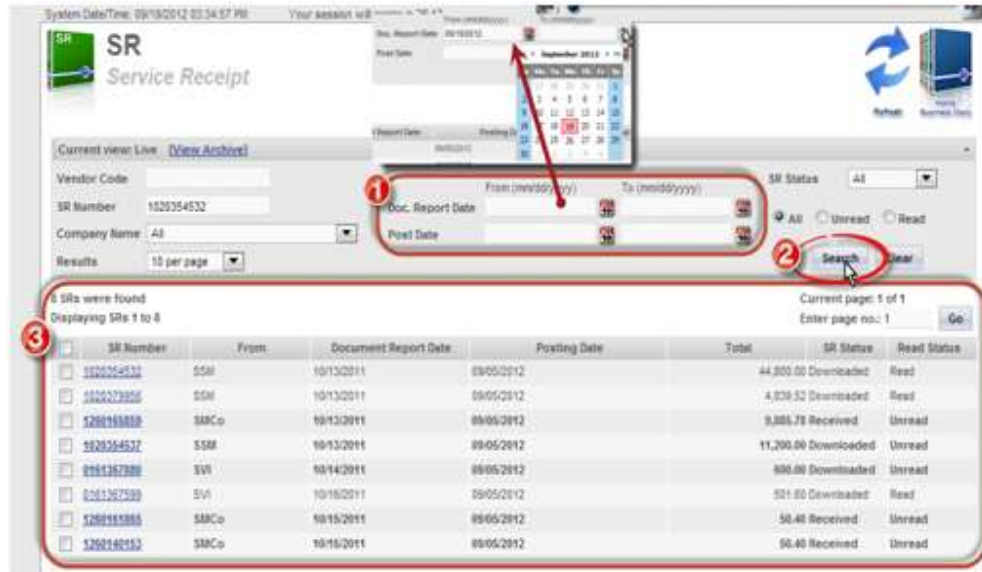3.   After clicking the Search button, the table will display the results.

g. To search for RTVDs by Read Status

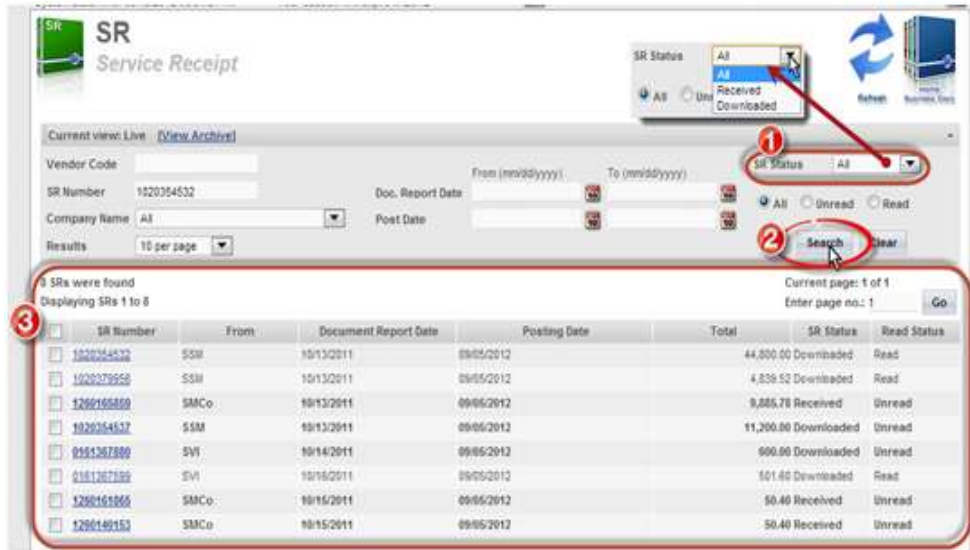1. Choose a RTVD status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

2.17.2.2 RTVD Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered) (1) key in a specific page number (2) then hit the "Go" button; and, (3) the table will display the results.
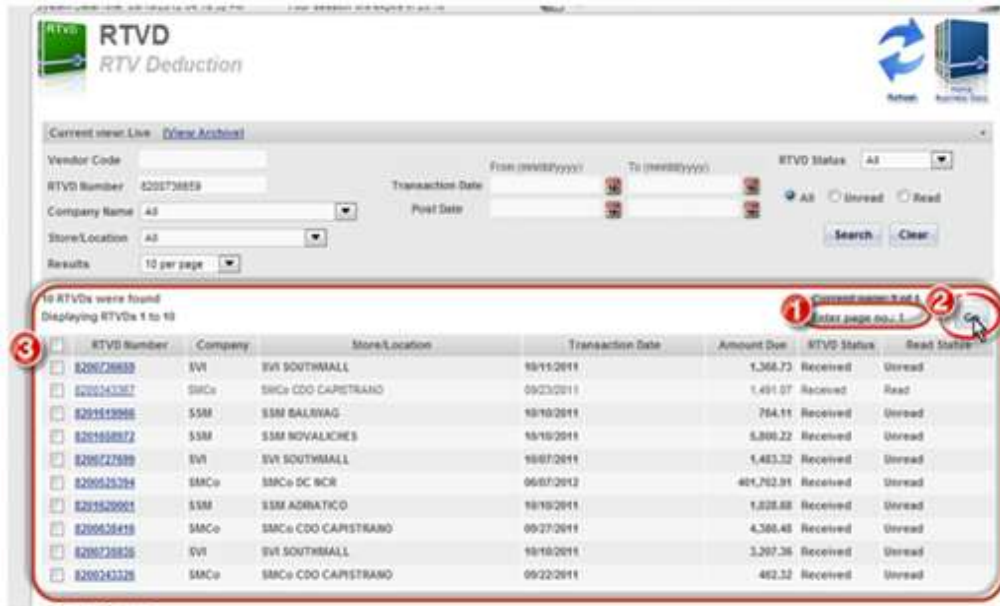

ⓘ This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.17.2.3 Sorting RTVD Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Transaction Date

2.17.3 RTVD Details Page

2.17.3.1 Opening a Specific RTVD Document

On the Search Results Section, click the RTVD number of the specific RTVD document you want to open.
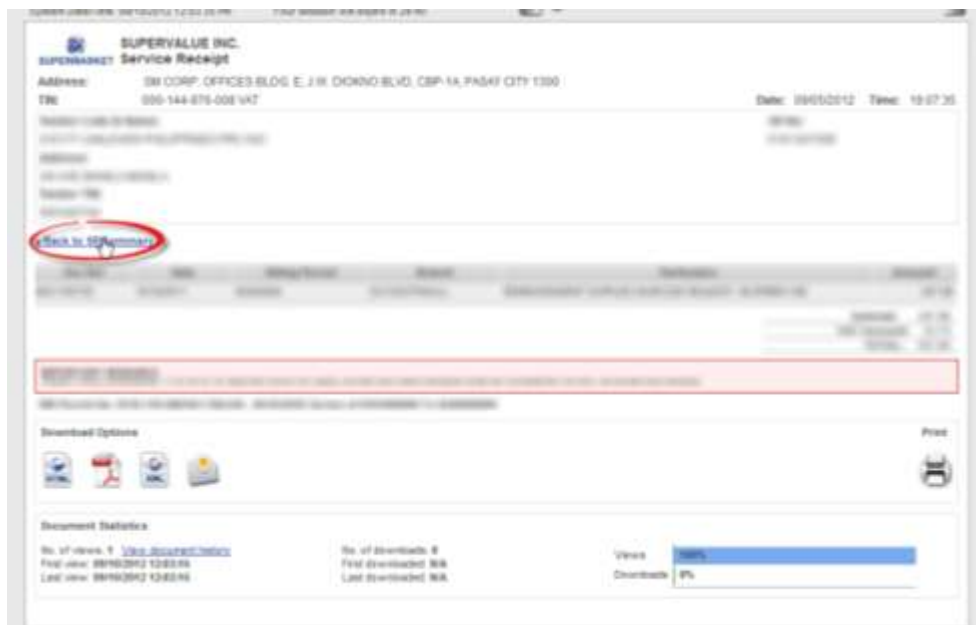
After clicking the RTVD number, you will be directed to its Details page.
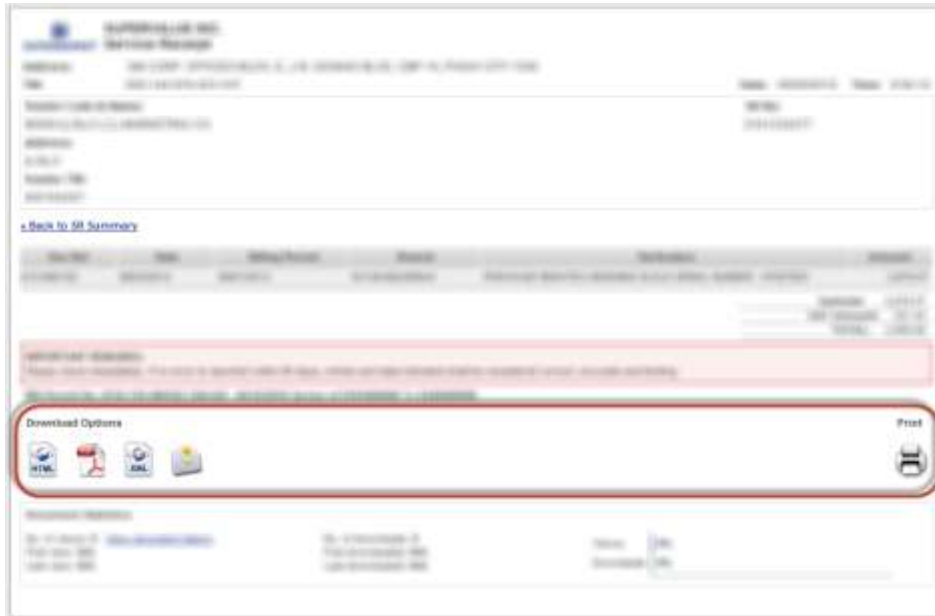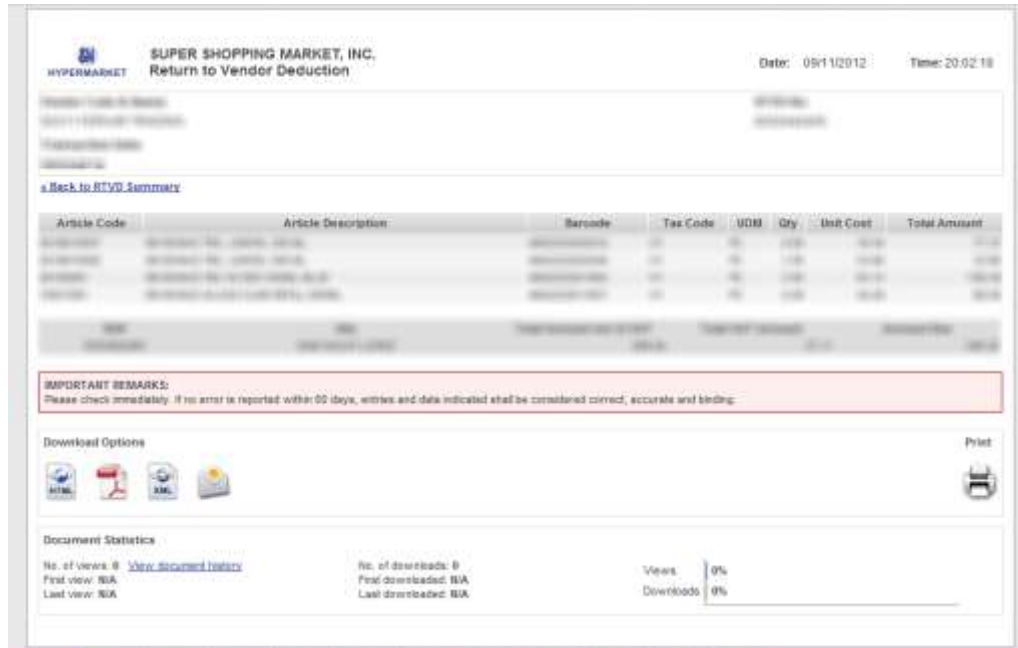

2.17.3.2 Returning to RTVD Summary Page

To return to the summary page after opening a specific RTVD Document, click "Back to RTVD Summary" located at the Detail Count Section.
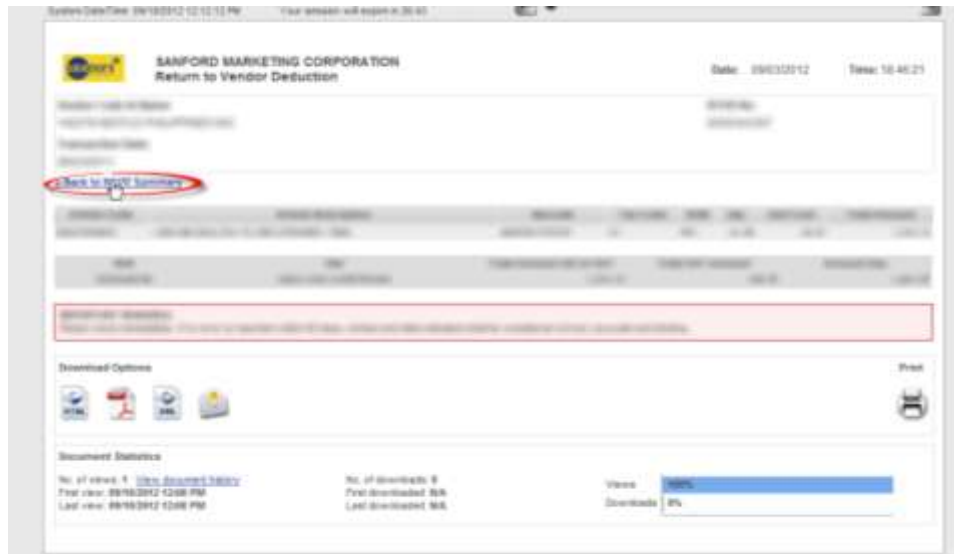
2.17.3.3 RTVD Download Options & Printing

You may download a specific document/message currently shown in the Details Page in any of the following format: Hyper Markup Language (.html), Portable Document Format

(.pdf) or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

You may also print specific document/message shown in the Details Page resembling the official business document/message.
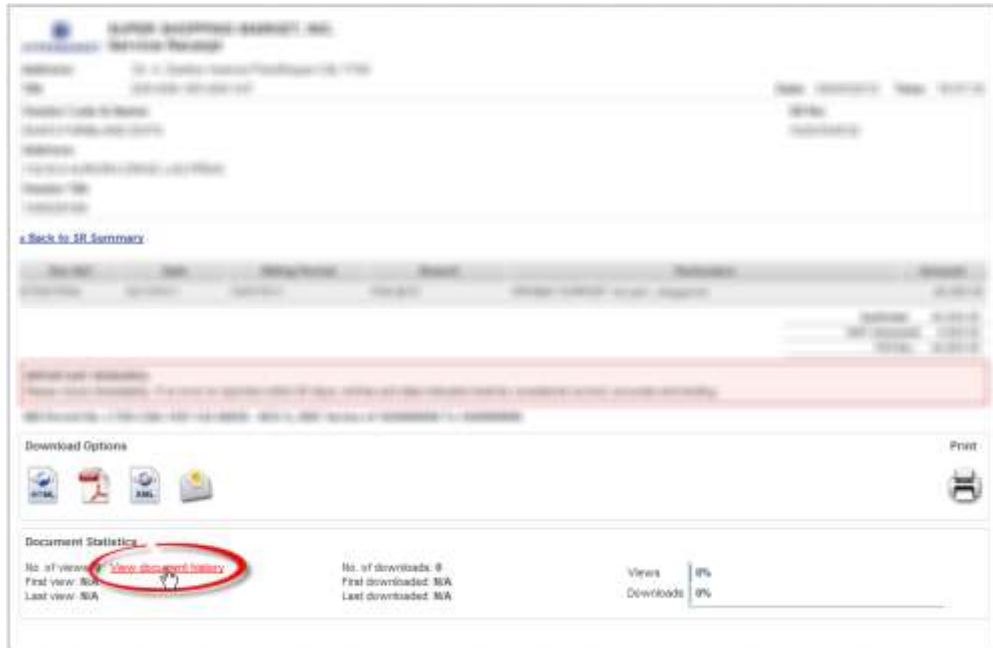
- To print a specific document/message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.


2.17.3.4 Viewing RTVD Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

- To view the document history, click the "View document history".

- A pop-up box will show the document history for the opened RTVD document.

2.18 DAILY SALES REPORT (DSR)

2.18.1 Accessing DSR Summary Page

1. To access the Daily Sales Report summary page, go to the BDMS home page and then click the Daily Sales Report button.

2. You are now at the DSR summary page.
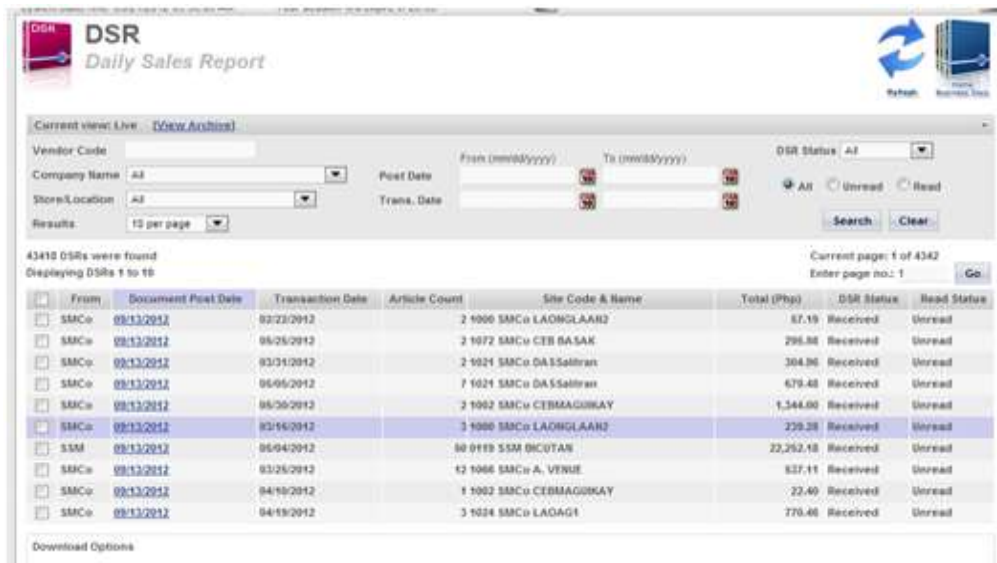
2.18.2 DSR Summary Page & DSR Archive Page

2.18.2.1 DSR Search Fields

You may search DSR using the following criteria:

a. Company Name
b. Store/Location
c. Number of Records to display per page(Results)
d. Document Post Date, Transaction Date
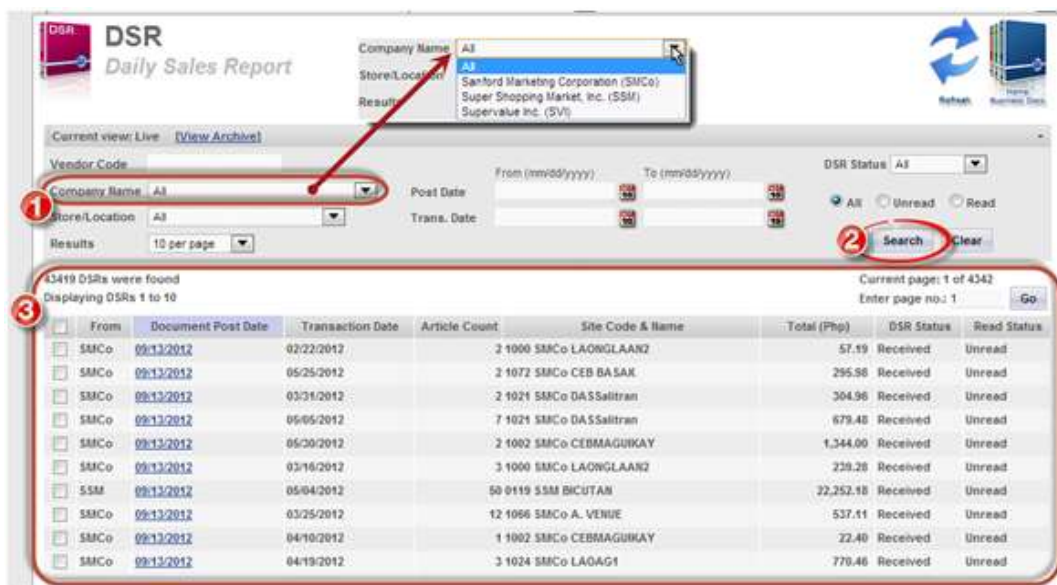
e.   Document Status (Received, Downloaded)
f.   Read Status (Unread, Read)

To get more accurate results, you may combine the criteria when you search.

---

a.   To search for DSRs by Company Name

1.   Click the drop-down list then select a specific company name or choose "All" to display all of them.

2.   Click the Search button located at the right side.

3.   After clicking the Search button, the table will display the results.
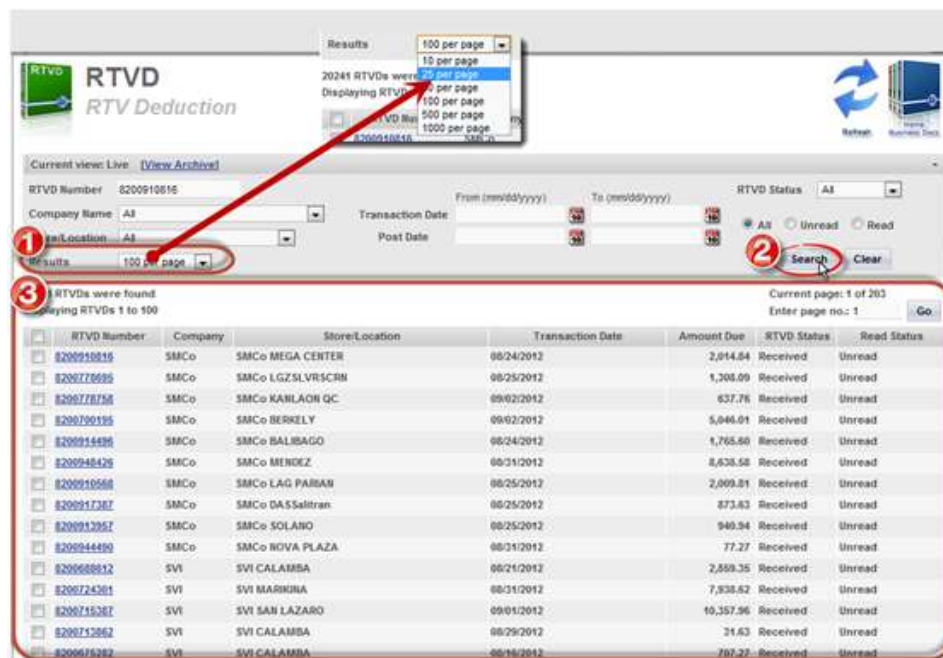

b.   To search for DSRs by Store/Location

1.   Click the drop-down list then select a Store/Location or choose "All" to display all of them.

2.   Click the Search button located at the right side.

3.   After clicking the Search button, the table will display the results.

c. To filter the Number of Records to Display per page

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

d. To search for DSRs by Document Post Date or Transaction Date

1. Manually key in the Document Post Date or Transaction Date using the format 'mm/dd/yyyy' or you may also select the dates using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

e. To search for DSRs by Document Status

1. Click the drop-down list then select a DSR status or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

f. To search for DSRs by Read status

1. Choose a DSR status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
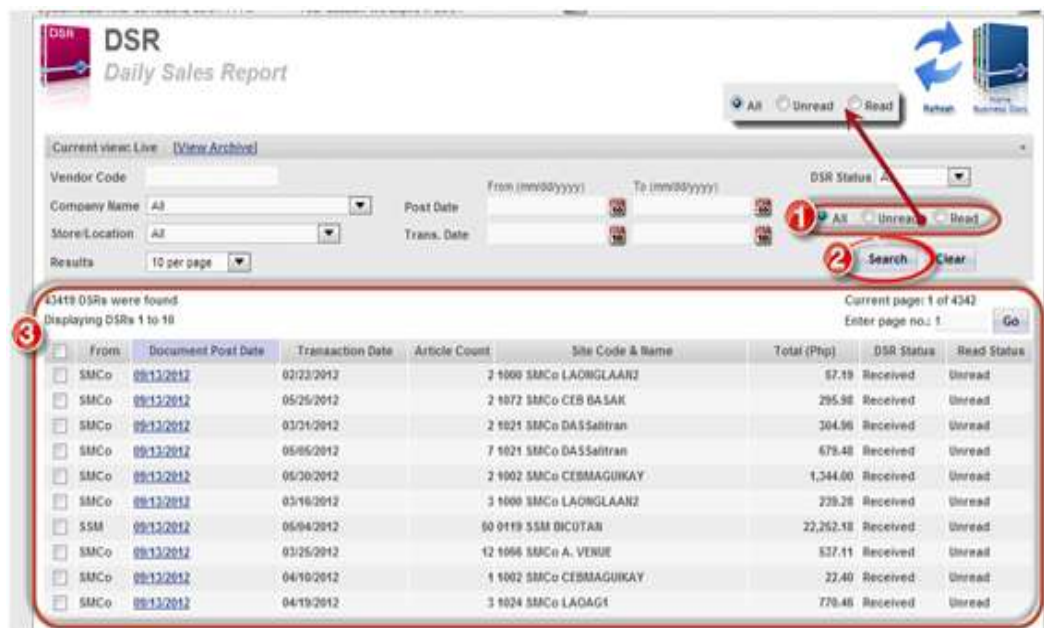
2.18.2.2 DSR Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered), (1) key in a specific page number (2) then hit the "Go" button; and, (3) the table will display the results.
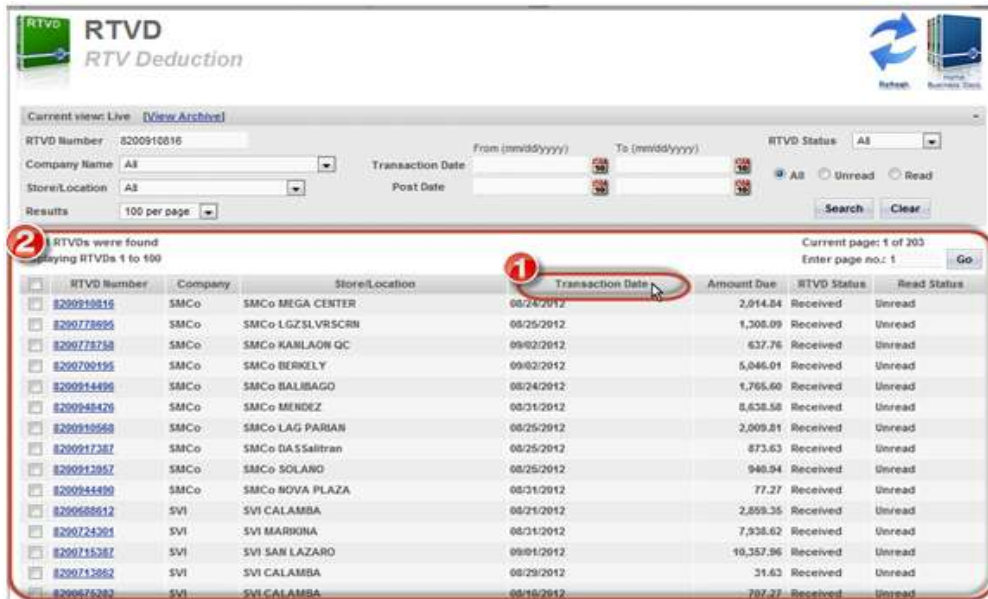

This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.18.2.3 Sorting DSR Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Document Post Date

2.18.3 DSR Details Page

2.18.3.1 Opening a Specific DSR Document

On the Search Results Section, click the Document Post Date of the specific DSR document you want to open.

After clicking the Document Post Date, you will be directed to its Details page.

2.18.3.2 Returning to DSR Summary Page

To return to the summary page after opening a specific DSR Document, click "Back to DSR Summary" (if you have opened a document in "Live" view) or "Back to DSR Archive" (if you have opened a document in "Archive" view) located at the Detail Count Section.
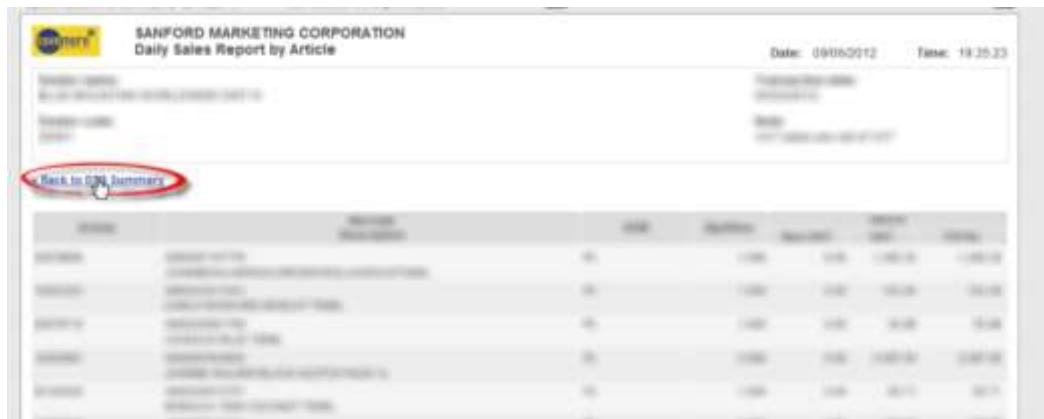
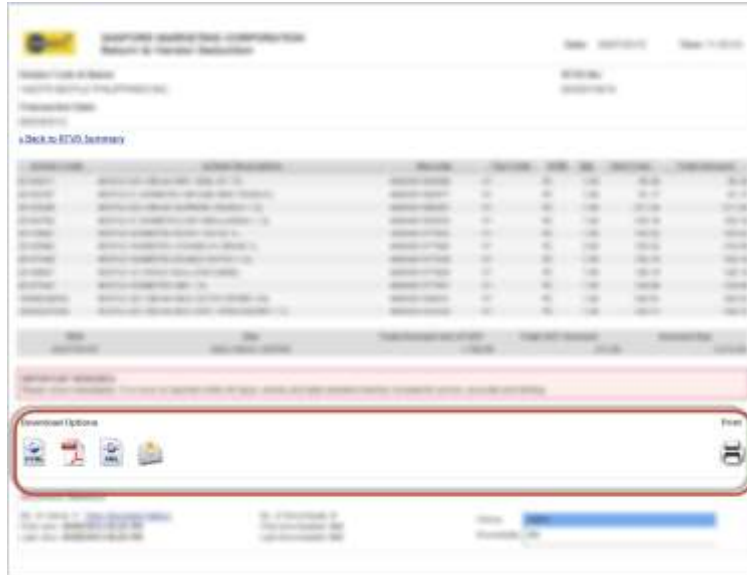## 2.18.3.3 DSR Download Options & Printing

You may download a specific document/message currently shown in the Details Page in any of the following format: Hyper Markup Language (.html), Portable Document Format (.pdf) or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

You may also print specific document/message shown in the Details Page resembling the official business document/message.

- To print a specific document / message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.
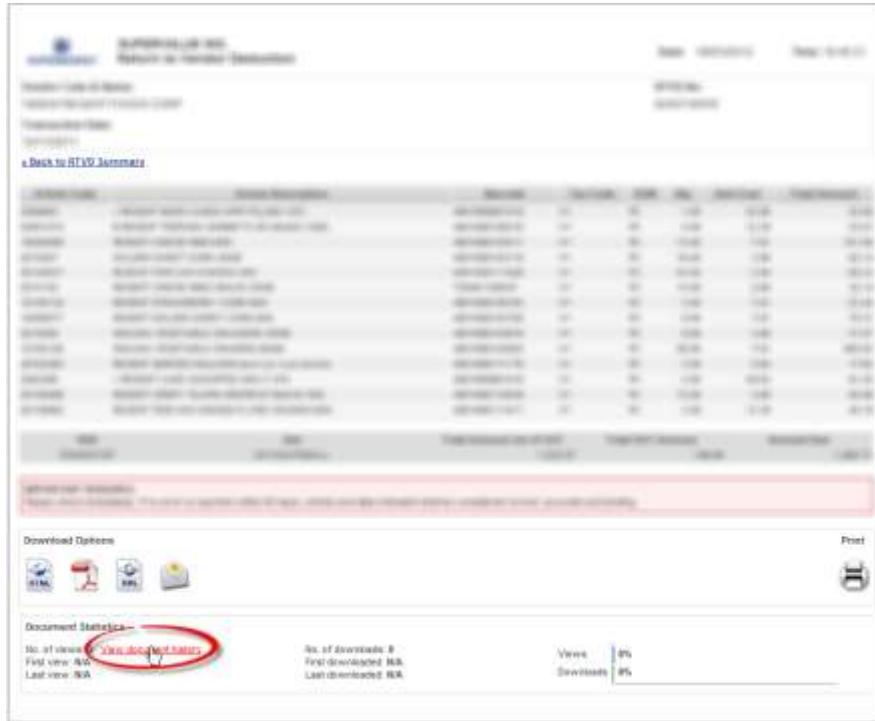

2.18.3.4 Viewing DSR Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

   - To view the document history, click the "View document history".

- A pop-up box will show the document history for the opened DSR document.

Date accessed	Accessed by	Description
08/17/2012 09:48 PM	First Last	Viewed document (first time)
End of document history		

Close window
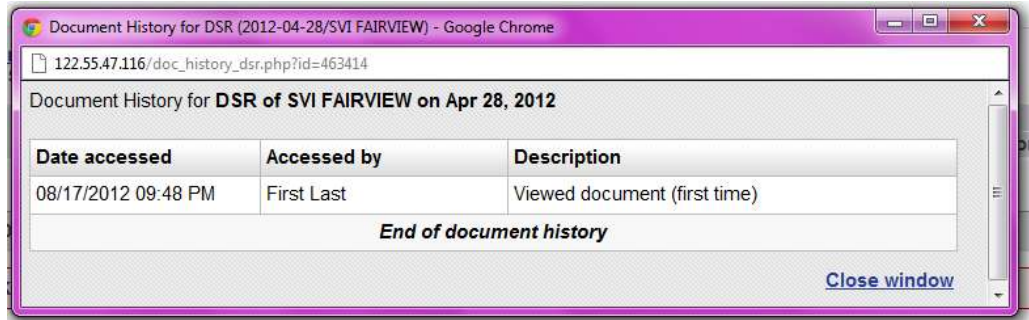
2.19 DAILY SALES REPORT SUMMARY (DSRS)

2.19.1 Accessing DSRS Summary Page

1. To access the Daily Sales Report Summary summary page, go to the BDMS then click the Daily Sales Report Summary button.

2. You are now at the DSRS summary page.
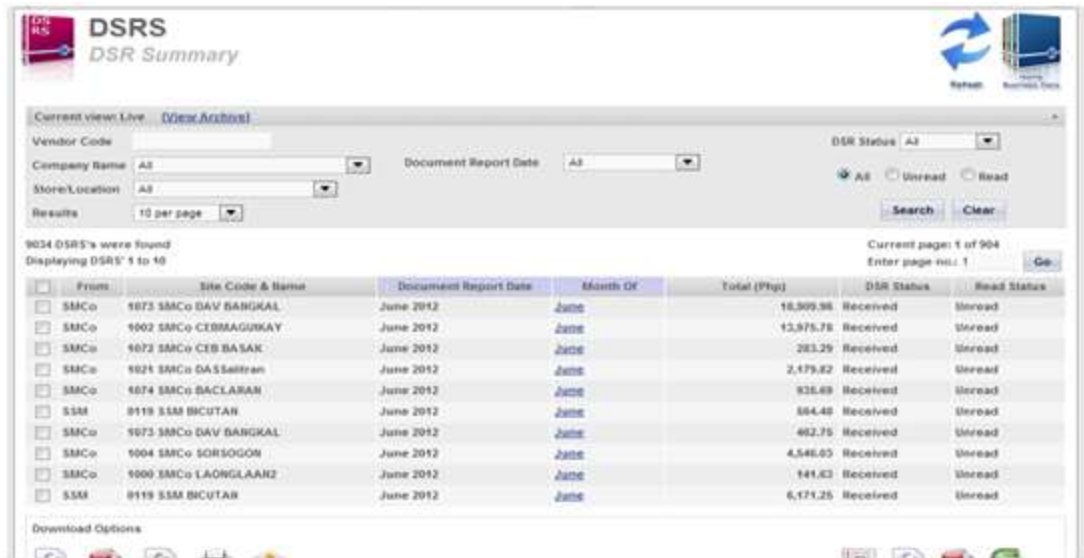
2.19.2 DSRS Summary Page & DSRS Archive Page

2.19.2.1 DSRS Search Fields

You may search DSRS using the following criteria:

a. Company Name
b. Store/Location
c. Number of Records to display per page(Results)
d. Document Report Date
e. Document Status (Received, Downloaded)
f. Read Status (Unread, Read)

To get more accurate results, you may combine the criteria when you search.

a. To search for DSRSs by Company Name

1. Click the drop-down list then select a specific company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

b. To search for DSRSs by Store/Location

1. Click the drop-down list then select a Store/Location or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results

c. To filter the Number of Records to Display per page

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

d. To search for DSRSs by Document Report Date

1. Click the drop-down list then select a Document Report Date or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

e.   To search for DSRSs by Document Status

1.   Click the drop-down list then select a DSR status or choose "All" to display all of them.

2.   Click the Search button located at the right side.

3.   After clicking the Search button, the table will display the results.

f.   To search for DSRSs by Read Status:

1.   Choose a DSR status then click the radio button of your choice or choose "All" to display all of them.

2.   Click the Search button located at the right side.

3.   After clicking the Search button, the table will display the results.

2.19.2.2 DSRS Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered), (1) key in a specific page number (2) then hit the "Go" button; and (3) the table will display the results.

This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.19.2.3 Sorting DSRS Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Month of

2.19.3 DSRS Details Page

2.19.3.1 Opening a Specific DSRS Document

On the Search Results Section, click the "Month of" of the specific DSRS document you want to open.

After clicking the "Month of", you will be directed to its Details page.

2.19.3.2 Viewing Related DSR document

The Amount is linked to the actual DSR. To open the related DSR document on Details Page, (1) click the "Amount"; and, (2) a pop-up window will appear showing the corresponding DSR Details.
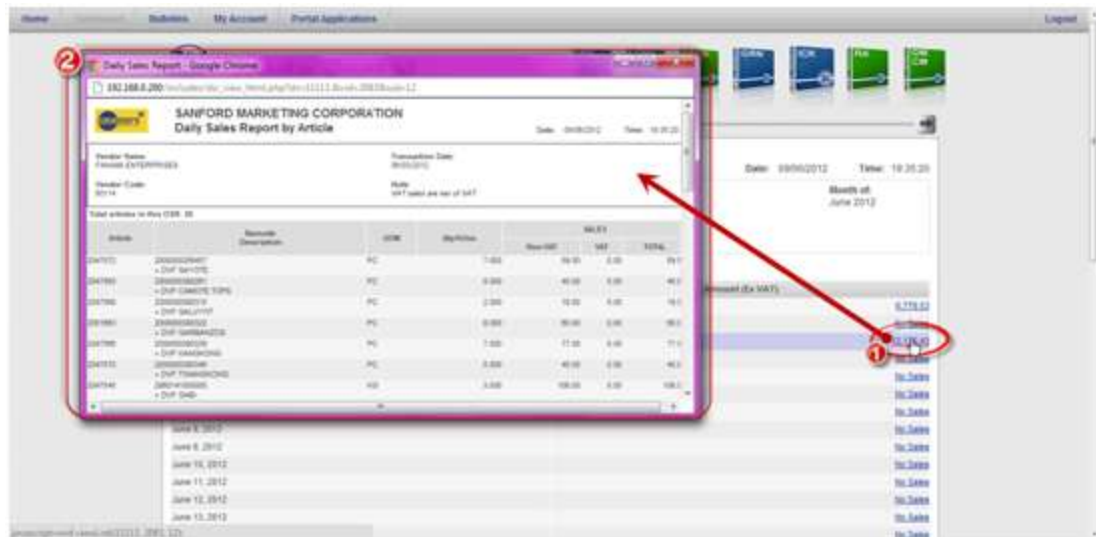
ℹ️   "No Sales" will be shown instead of the amount, if there is no sales for a specific day, or if the sales for a specific day have not been processed yet. Items with "No Sales" and late postings will be displayed in Red. Items with sales amounts will be displayed in blue.

2.19.3.3 Returning to DSRS Summary Page

To return to the summary page after opening a specific DSRS Document, click "Back to DSRS Summary" located at the Detail Count Section.

2.19.3.4 DSRS Download Options & Printing

You may download a specific document/message currently shown in the Details Page in the following format: Hyper Markup Language (.html), Portable Document Format (.pdf) or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

You may also print specific document/message shown in the Details Page resembling the official business document / message.

- To print a specific document / message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.

2.19.3.5 Viewing DSRS Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

- To view the document history, click the "View document history".

- A pop-up box will show the document history for the opened DSRS document.
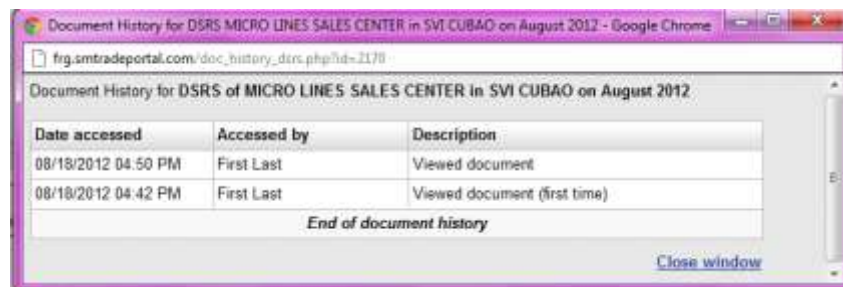
2.20 CONSOLIDATED LIQUIDATION REPORT (CLR)

2.20.1 Accessing CLR Summary Page

1. To access the Consolidated Liquidation Report summary page, go to the BDMS home page and click the Consolidated Liquidation Report button.

2. You are now at the CLR Summary page.

2.20.2 CLR Summary Page & CLR Archive Page

2.20.2.1 CLR Search Fields

You may search CLR using the following criteria:
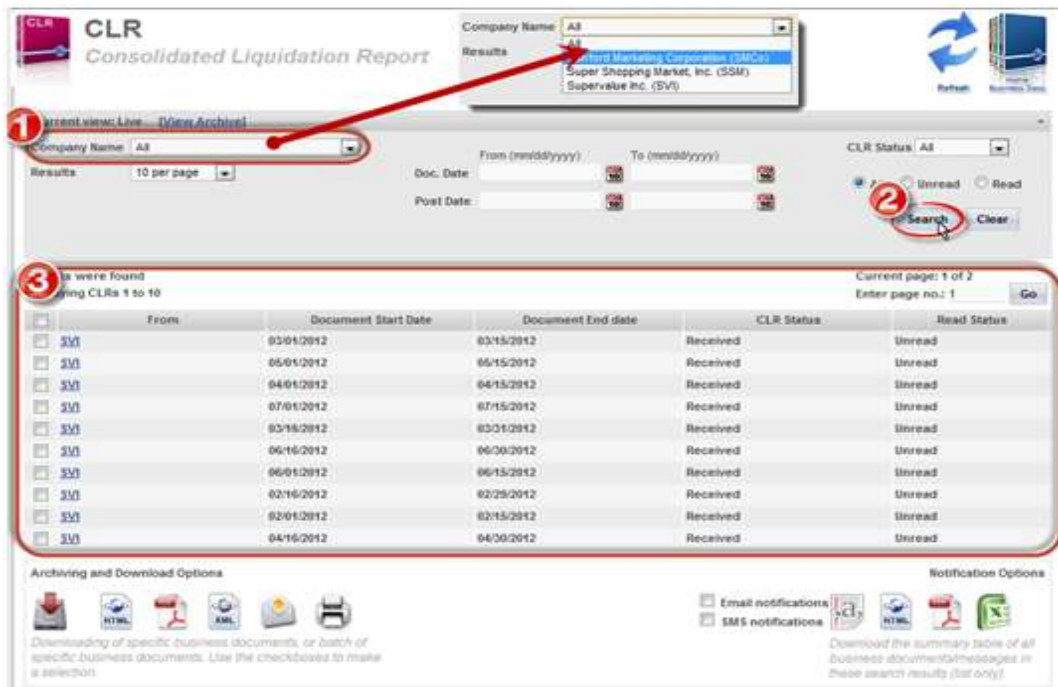
a. Company Name
b. Number of Records to display per page(Results)
c. Document Start Date, Post Date
d. Document Status (Received, Downloaded)
e. Read Status (Unread, Read)

(i) To get more accurate results, you may combine the criteria when you search.

a. To search for CLRs by Company Name

1. Click the drop-down list then select a specific company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

b.   To filter the Number of Records to Display per page

1.   Click the drop-down list labeled "Results" then click the desired number of records per page.

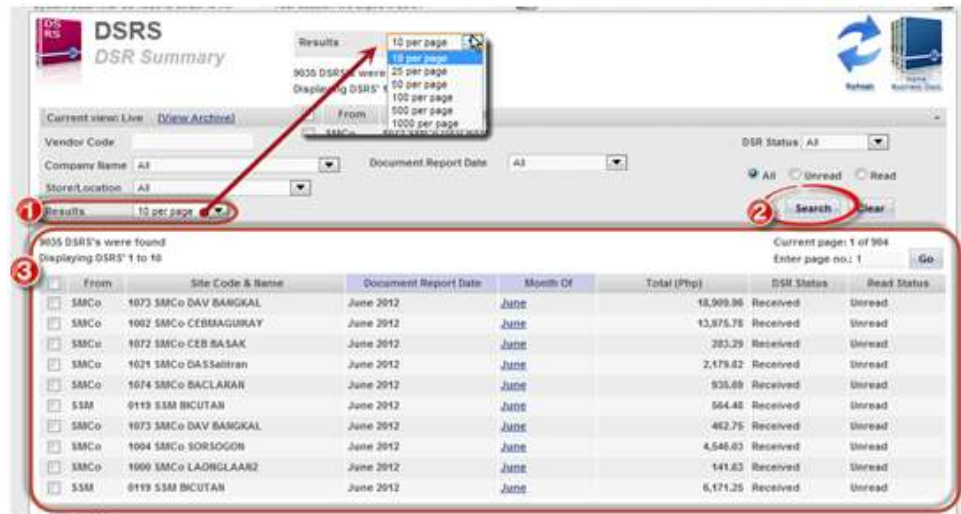2.   Click the Search button located at the right side.

3.   After clicking the Search button, the table will display the results.

c.   To search for CLRs by Document Start Date, Post Date

1.   Manually key in the Document Start Date or Post Date using the format 'mm/dd/yyyy' or you may also select the dates using the calendar.

2.   Click the Search button located at the right side.

3.   After clicking the Search button, the table will display the results.

ⓘ The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

---

d. To search for CLRs by Document Status

1. Click the drop-down list then select a CLR status or choose "All" to display all of them.

2. Click the Search button located at the right side.

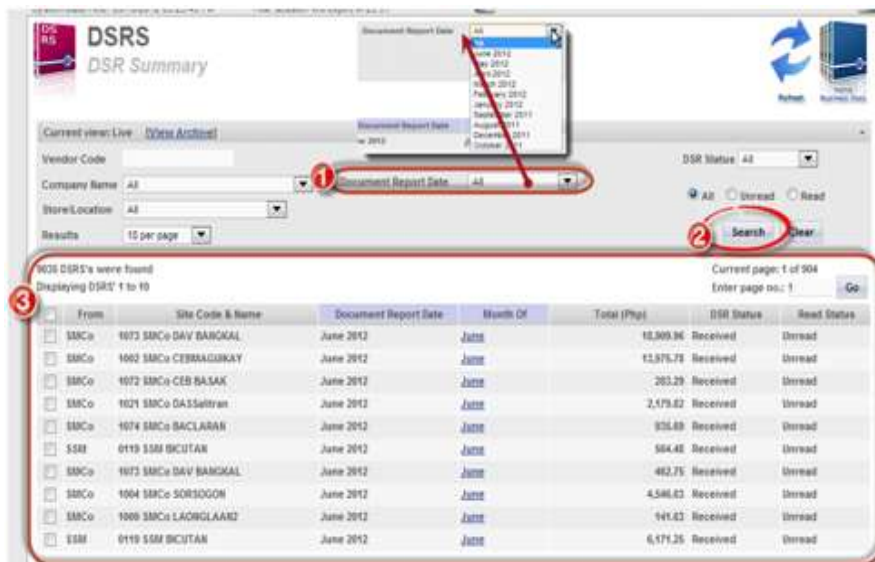3. After clicking the Search button, the table will display the results.

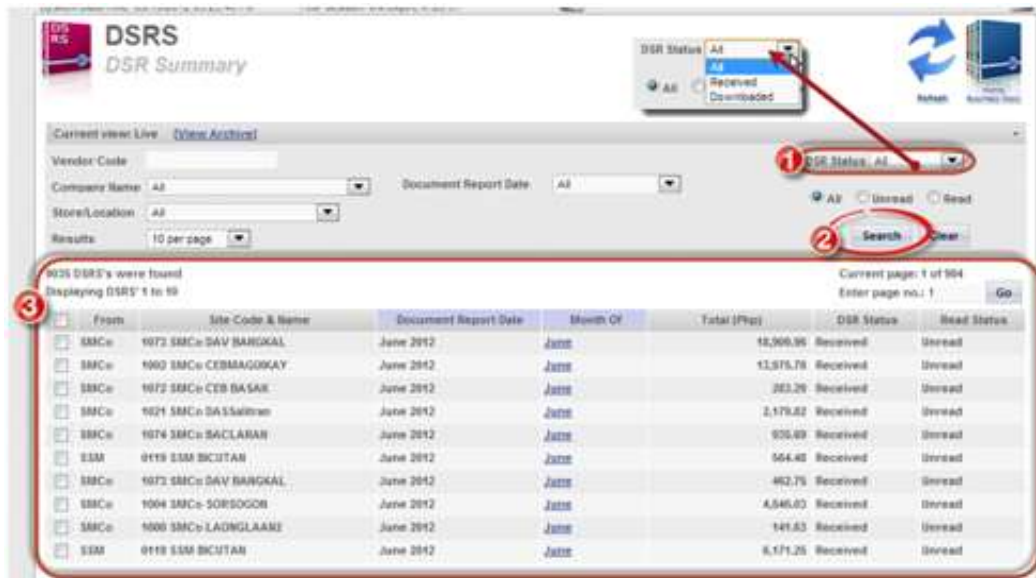### e. To search for CLRs by Read Status

1. Choose a CLR status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right side.

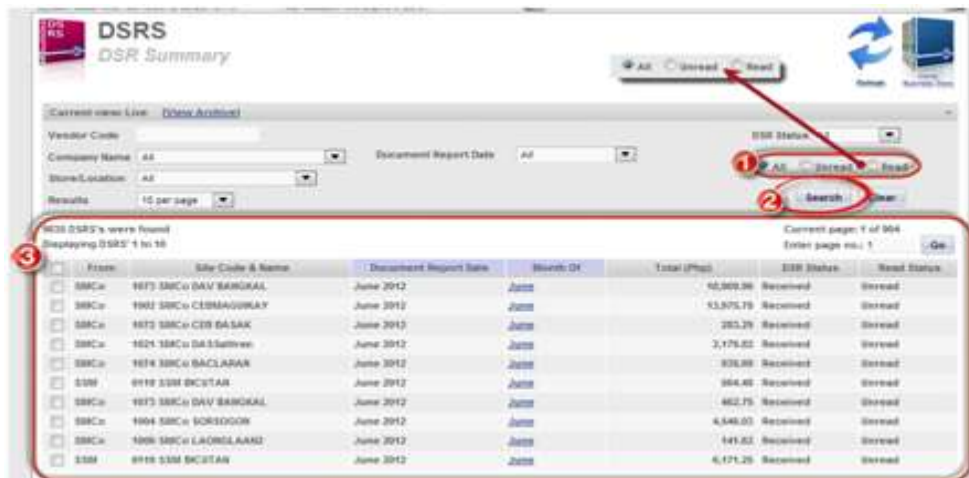3. After clicking the Search button, the table will display the results.

2.20.2.2 CLR Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered) (1) key in a specific page number (2) then hit the "Go" button; and, (3) the table will display the results.
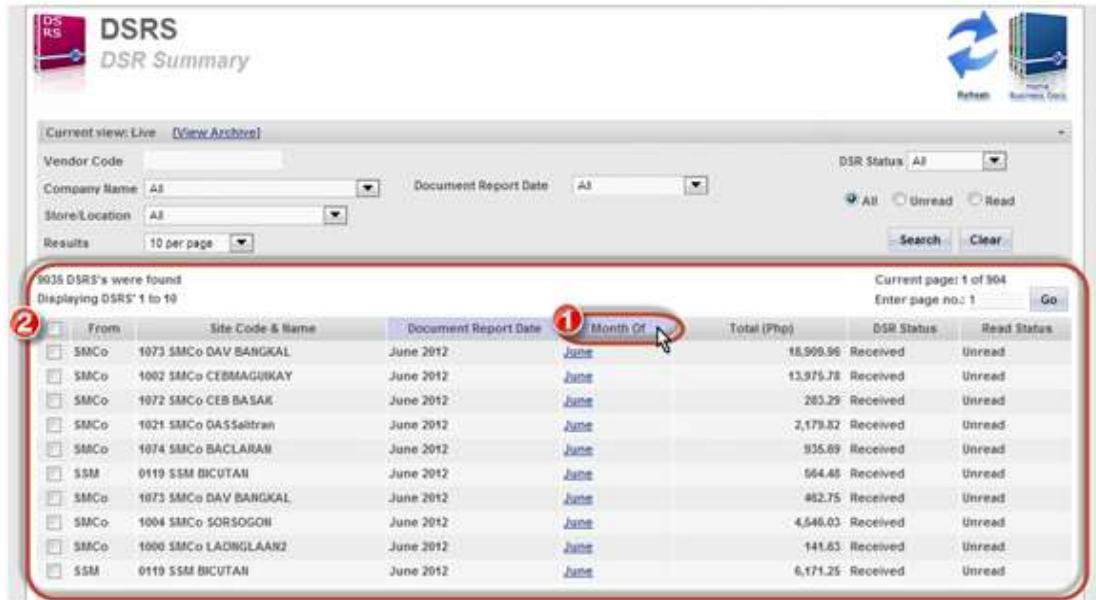

This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.20.2.3 Sorting CLR Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Document End Date

2.20.3 CLR Details Page

2.20.3.1 Opening a Specific CLR Document

On the Search Results Section, click the Company Name of the specific CLR document you want to open.

After clicking the Company Name, you will be directed to its Details page.

2.20.3.2 Returning to CLR Summary Page

To return to the summary page after opening a specific CLR Document, click "Back to CLR Summary" located at the Detail Count Section.

2.20.3.3 CLR Download Options & Printing

You may download a specific document/message currently shown in the Details Page in any of the following format: Hyper Markup Language (.html), Portable Document Format (.pdf) or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

You may also print specific document/message shown in the Details Page resembling the official business document / message.

- To print a specific document / message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.

2.20.3.4 Viewing CLR Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:
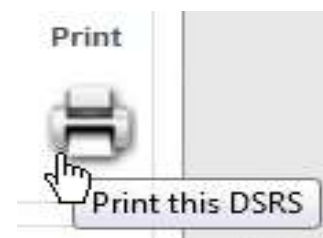
1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

   - To view the document history, click the   "View document history".

- A pop-up box will show the document history for the opened CLR document.
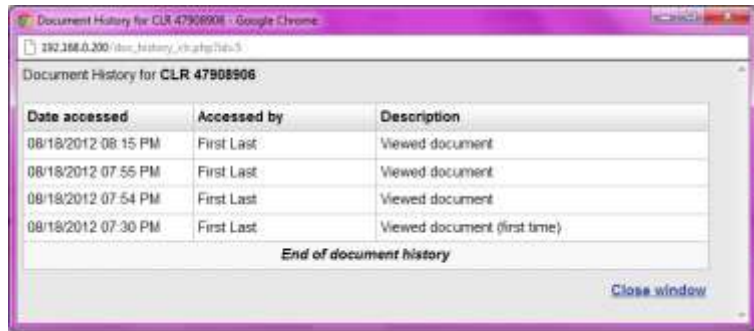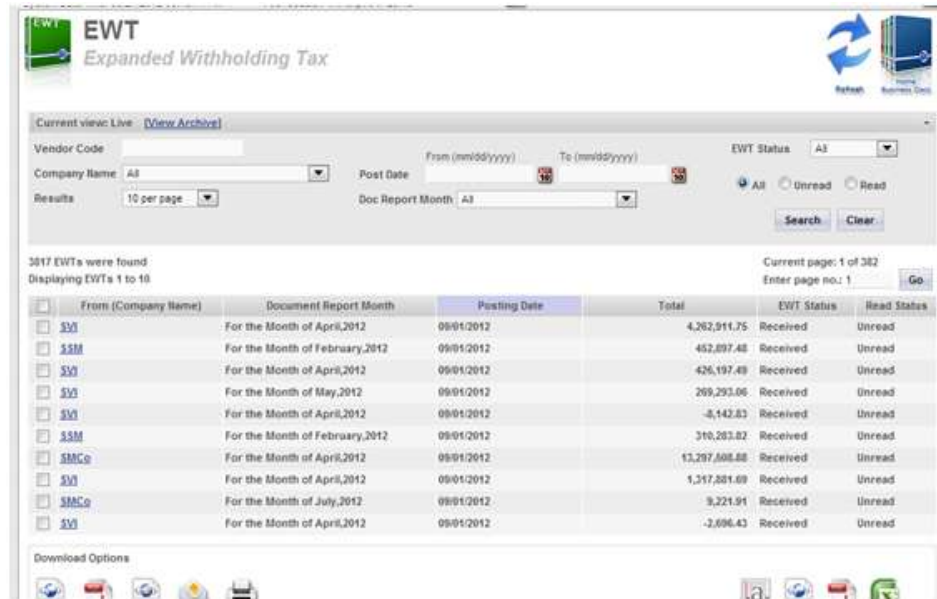
2.21 EXPANDED WITHHOLDING TAX (EWT)

2.21.1 Accessing EWT Summary Page

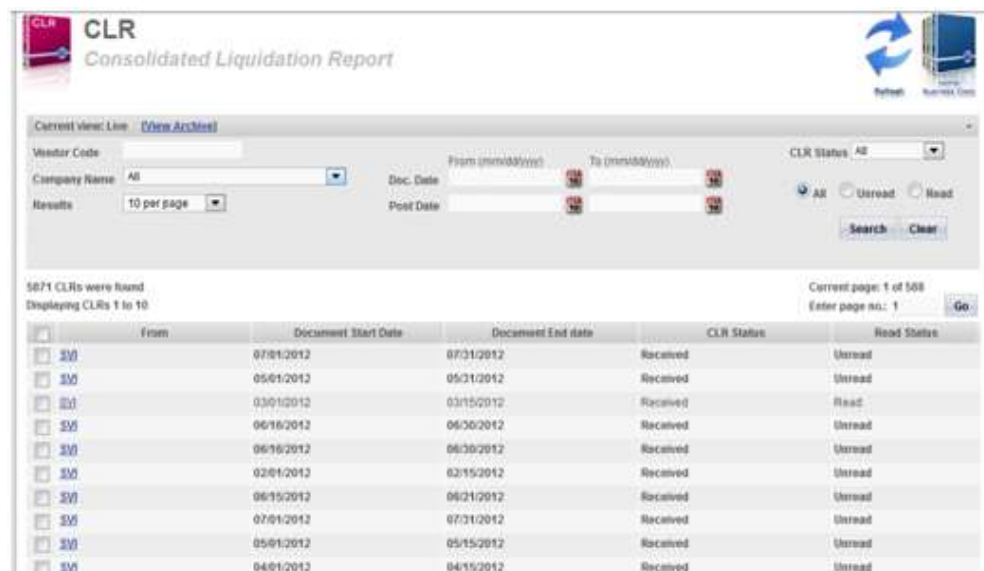1. To access the Expanded Withholding Tax summary page, go to the BDMS home page and then click the Expanded Withholding Tax button.

2. You are now at the EWT Summary page.

2.21.2 EWT Summary Page & EWT Archive Page

2.21.2.1 EWT Search Fields

You may search EWT using the following criteria:

a. Company Name
b. Number of Records to display per page(Results)
c. Post Date
d. Document Report Month
e. Document Status (Received, Downloaded)
f. Read Status (Unread, Read)

To get more accurate results, you may combine the criteria when you search.

a. To search for EWTs by Company Name

1. Click the drop-down list then select a specific company name or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
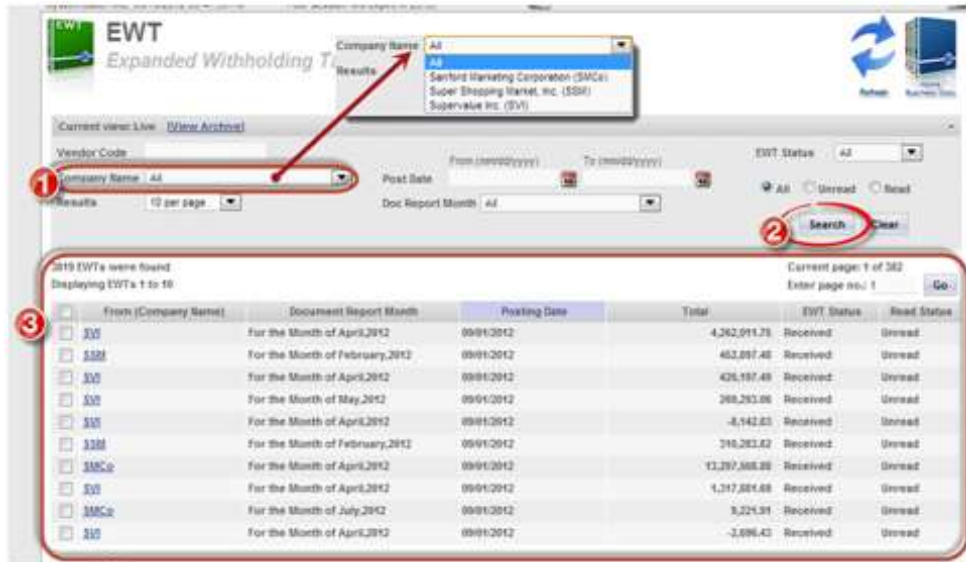
b. To filter the Number of Records to Display per page

1. Click the drop-down list labeled "Results" then click the desired number of records per page.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
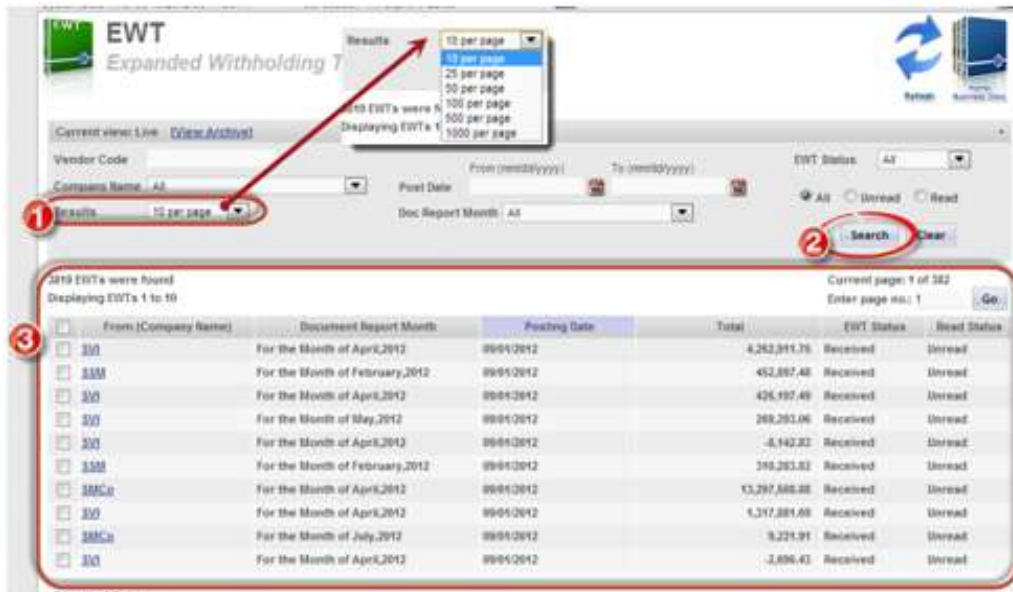
c. To search for EWTs by Post Date

1. Manually key in the Post Date using the format 'mm/dd/yyyy' or you may also select the dates using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
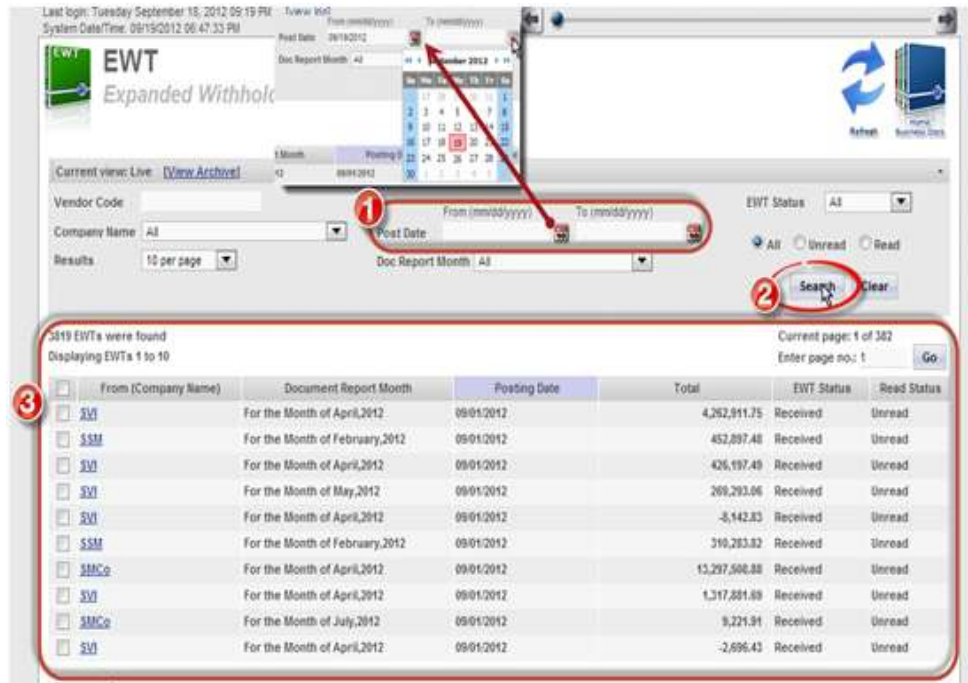
ℹ️ The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

d. To search for EWTs by Document Report Month

1. Click the drop-down list then select a specific Document Report Month or choose "All" to display all of them.

2. Click the Search button located at the right side.

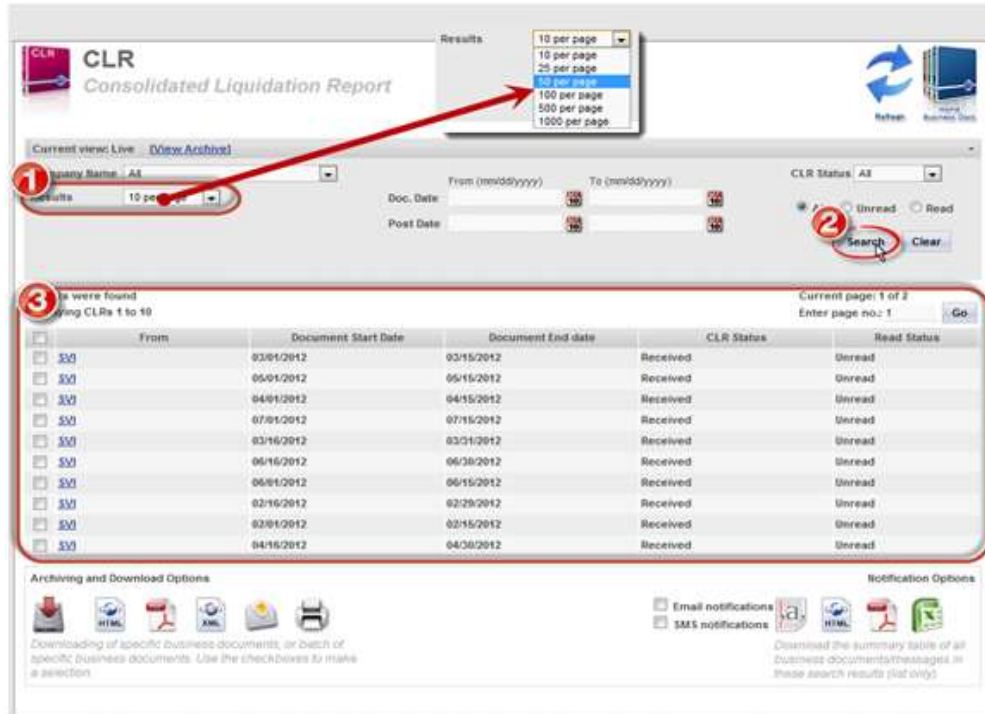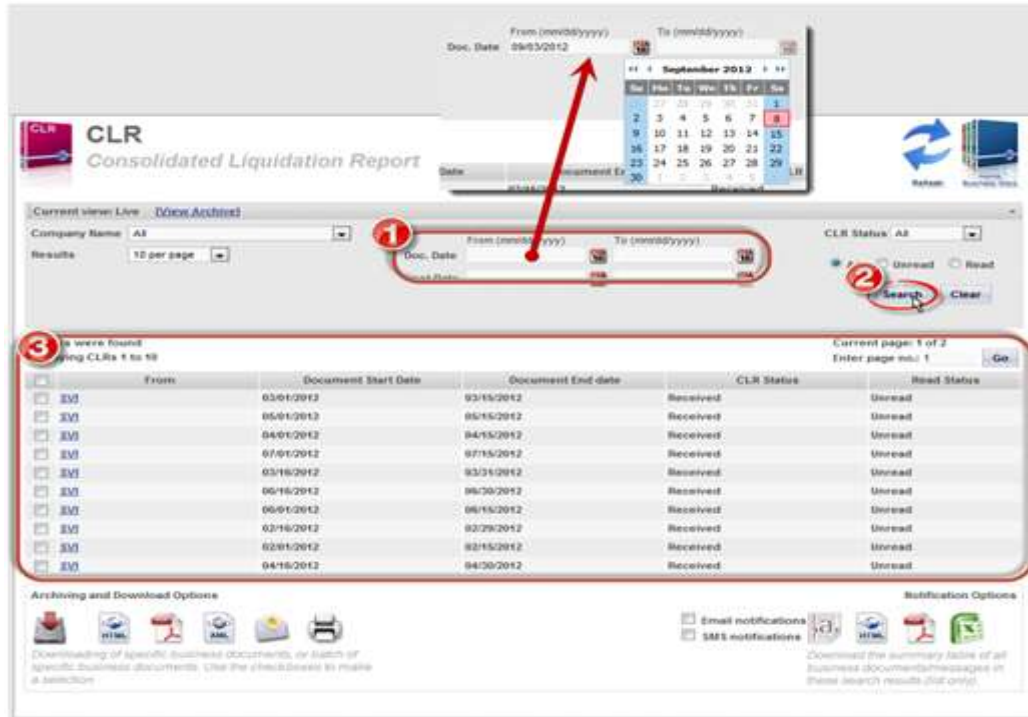3. After clicking the Search button, the table will display the results.
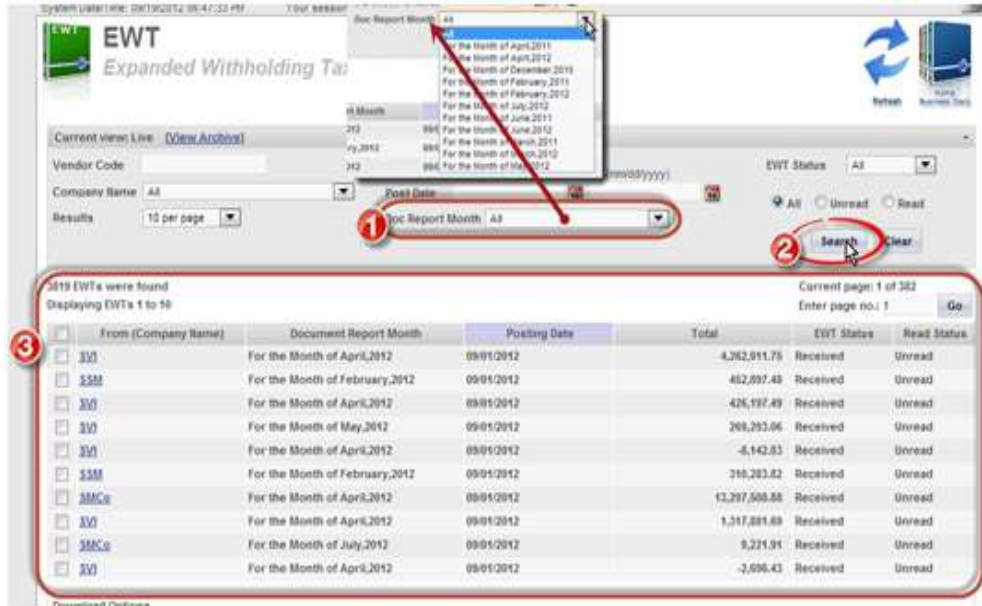
e.   To search for EWTs by Document Status

1.   Click the drop-down list then select a EWT status or choose "All" to display all of them.

2.   Click the Search button located at the right side.

3.   After clicking the Search button, the table will display the results.
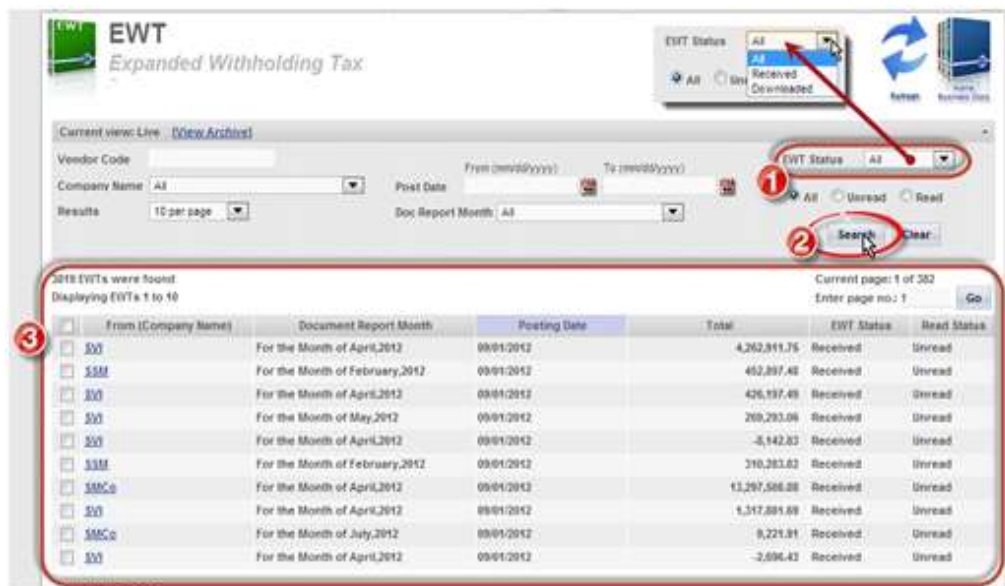
f. To search for EWTs by Read Status:

1. Choose a EWT status then click the radio button of your choice or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
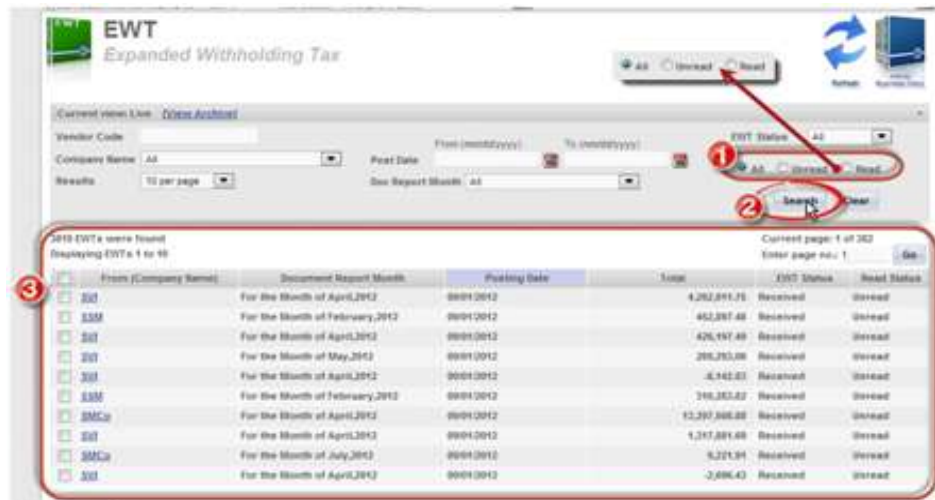
2.21.2.2 EWT Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered), (1) key in a specific page number (2) then hit the "Go" button; and, (3) the table will display the results.
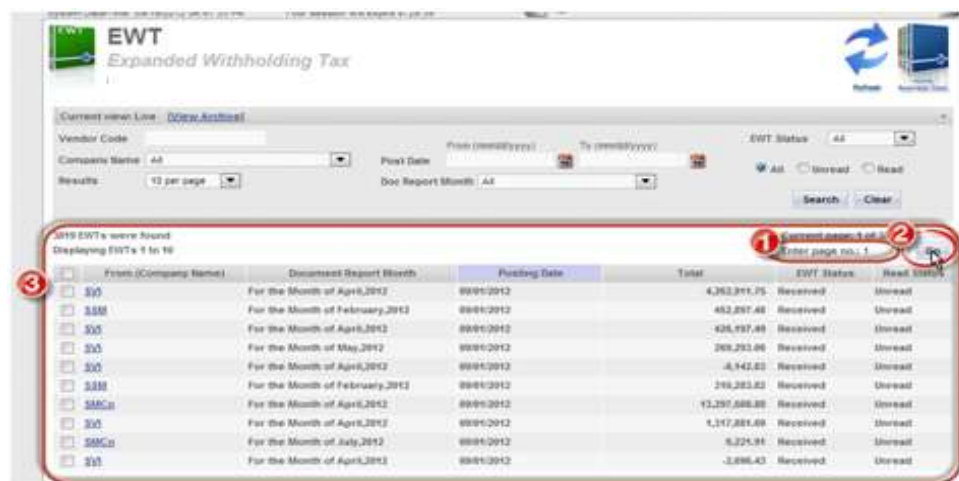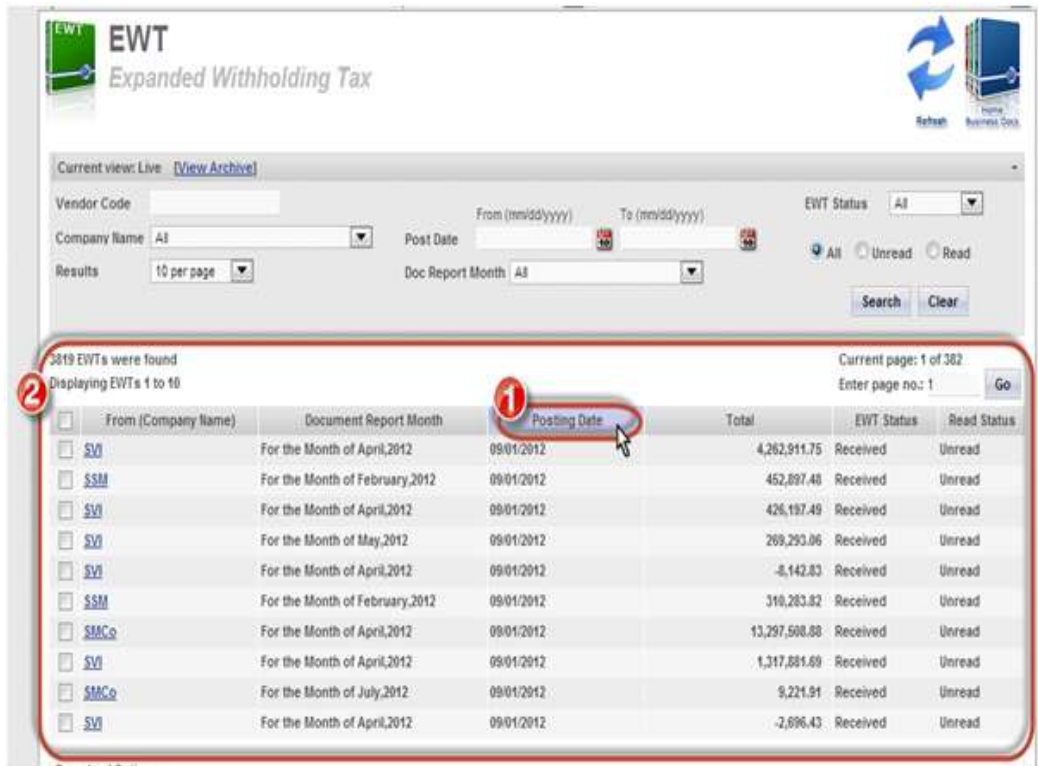
> *i* This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.21.2.3 Sorting EWT Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

Example: Sorted Posting Date

2.21.3.1 Opening a Specific EWT Document

On the Search Results Section, click the Company Name of the specific EWT document you want to open.

After clicking the Company Name, you will be directed to its Details page.

2.21.3.2 Returning to EWT Summary Page

To return to the summary page after opening a specific EWT Document, click "Back to EWT Summary" located at the Detail Count Section.

2.21.3.3 EWT Download Options & Printing

You may download a specific document/message currently shown in the Details Page in any of the following format: Hyper Markup Language (.html), Portable Document Format (.pdf) or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

You may also print specific document/message shown in the Details Page resembling the official business document/message.

- To print a specific document/message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.

2.21.3.4 Viewing EWT Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

- To view the document history, click the "View document history".

- A pop-up box will show the document history for the opened EWT document.
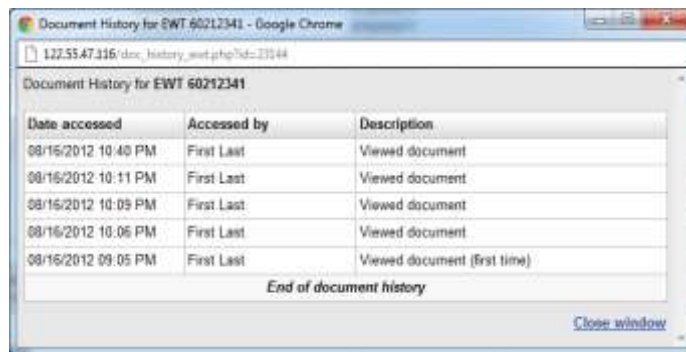
2.22 DAILY TIME RECORD (DTR)

2.22.1 Accessing DTR Summary Page

1. To access the Daily Time Record summary page, go to the BDMS home page and then click the Daily Time Record button.

2. You are now at DTR Summary page.
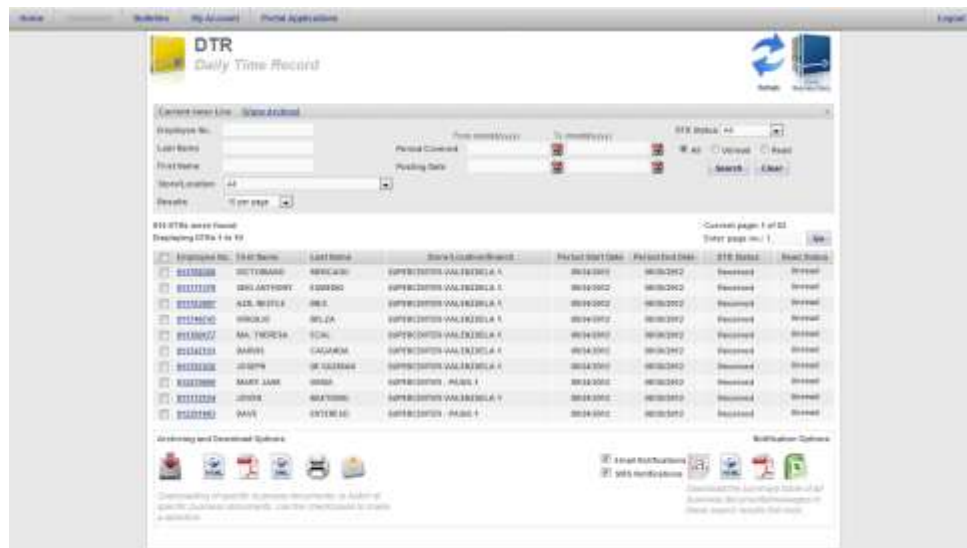
2.22.2 DTR Summary Page & DTR Archive Page

2.22.2.1 DTR Search Fields

You may search DTR using the following criteria:
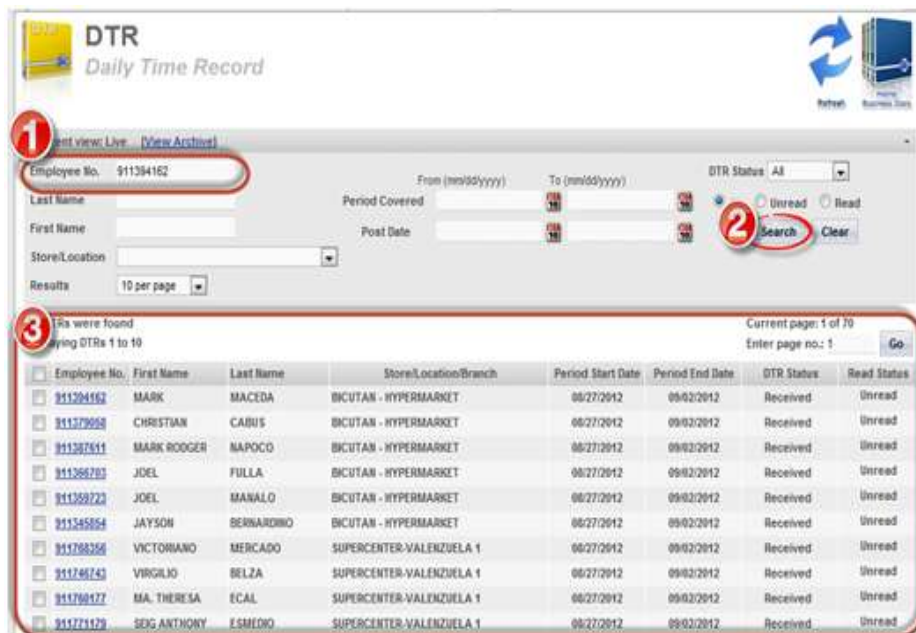
a.   Employee Number
b.   Employee's Last Name
c.   Employee's First Name
d.   Store Location
e.   Number of Records to display per page(Results)
f.   Period Covered, Post Date
g.   Document Status (Received, Downloaded)
h.   Read Status (Unread, Read)

> ℹ️ To get more accurate results, you may combine the criteria when you search.

a.   To search for DTRs by Employee Number

1.   Key in the Employee number in the text box.

2.   Then click the Search button located at the right side.

3.   After clicking the Search button, the table will display the results.

> The maximum number of characters for Employee number is 9. The text box accepts numeric characters only and will search for Employee numbers containing the indicated number.

b.   **To search for DTRs by Employee's Last Name**

1.   Key in the Employee's Last Name in the text box.

2.   Then click the Search button located at the right side.

3.   After clicking the Search button, the table will display the results.

> The maximum number of characters for Employee Last Name is 20. The text box accepts alpha characters only and will search for Employee Last Name containing the indicated character

c. **To search for DTRs by Employee's First Name**

1. Key in the Employee's First Name in the text box.

2. Then click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

The maximum number of characters for Employee First Name is 20. The text box accepts alpha characters only and will search for Employee First Name containing the indicated characters.

d. **To search for DTRs by Store/Location**

1. Click the drop-down list then select a store/ location or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
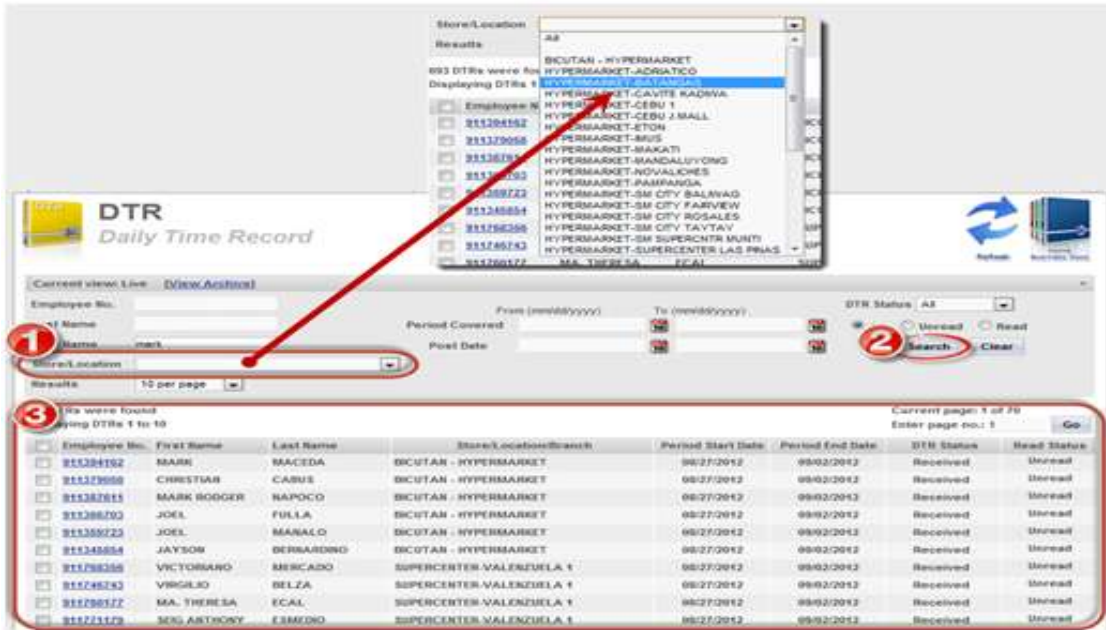
e.   To filter the Number of Records to Display per page

1.   Click the drop-down list labeled "Results" then click the desired number of records per page.

2.   Click the Search button located at the right side.

3.   After clicking the Search button, the table will display the results.
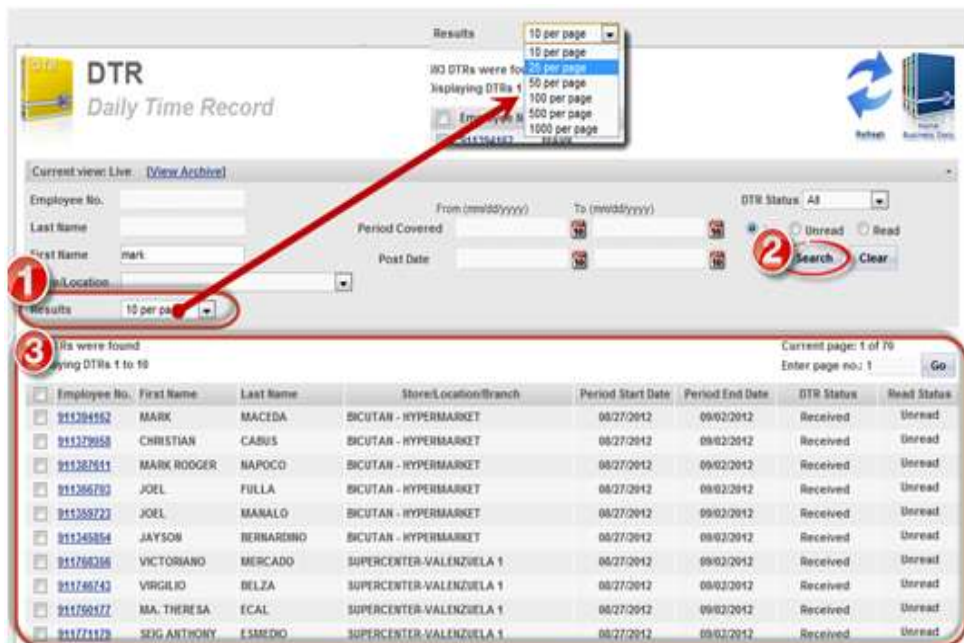
f. **To search for DTRs by Period Covered, Post Date**

1. Manually key in the Period Covered or Post Date using the format: 'mm/dd/yyyy' or you may also select the dates using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

The date 'To' date indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

g. **To search for DTRs by Document Status**

1. Click the drop-down list then select a DTR status or choose "All" to display all of them.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.
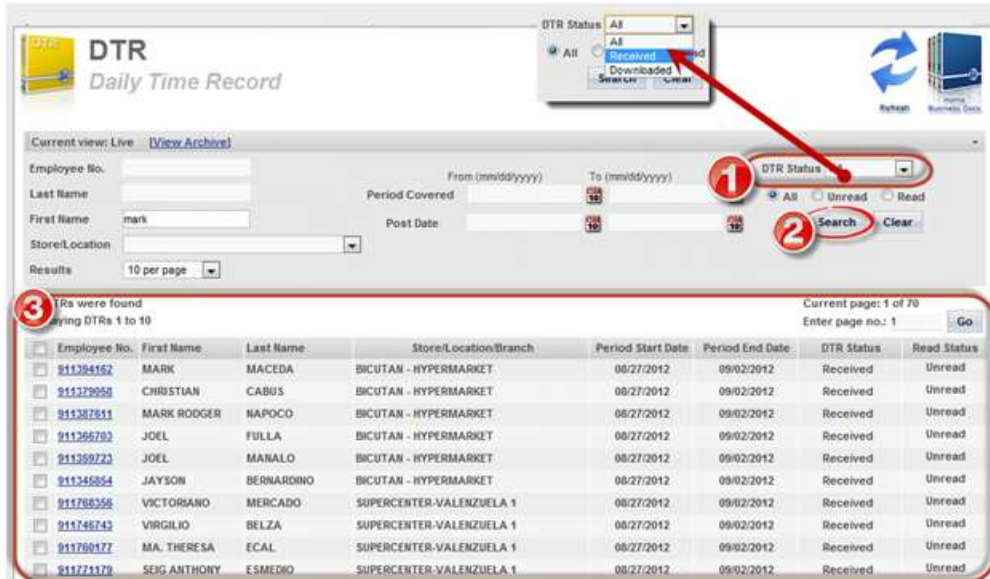
**h.   To search for DTRs by Read Status**

1.   Choose a DTR status then click the radio button of your choice or choose "All" to display all of them.

2.   Click the Search button located at the right side.

3.   After clicking the Search button, the table will display the results.
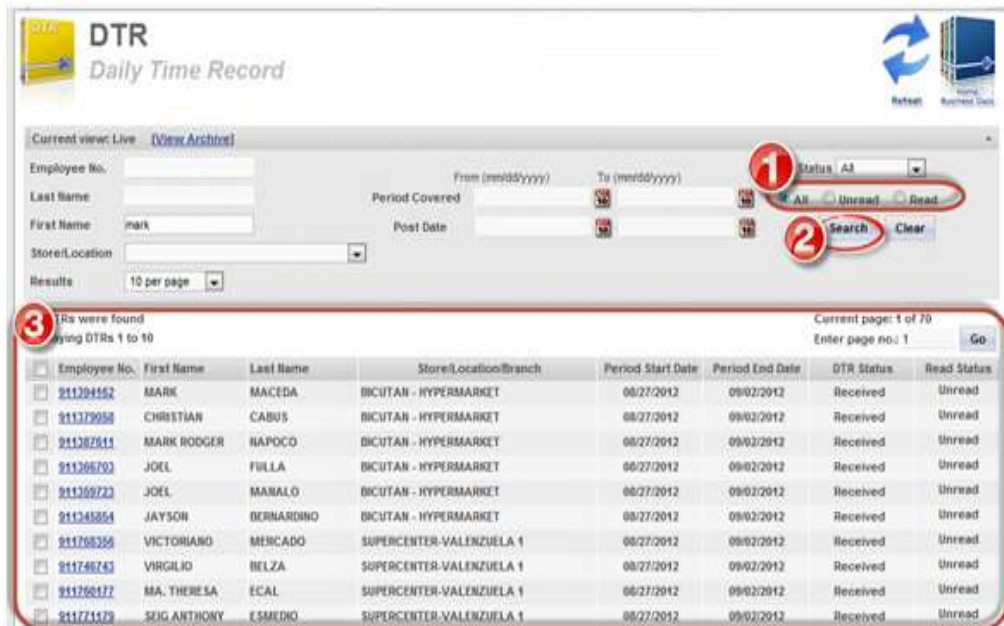
2.22.2.2 DTR Page Mark

This section shows the current page number out of the total number of pages of the Search Results.

To display the other pages of the Search Results (also using the same search filters you had entered), (1) key in a specific page number (2) then hit the "Go" button; and, (3) the table will display the results.

This field allows only numeric entries within the page range of the results. Empty value is not allowed.

2.22.2.3 Sorting DTR Column Headers

The Search Results can be arranged in ascending or descending order based on each of the column headers. To sort column headers (1) just click any of the column headers that you want to sort; and, (2) the table will display the results.

2.22.3 DTR Details Page

2.22.3.1 Opening a Specific DTR Document

On the Search Results Section, click the Company Name of the specific EWT document you want to open.

After clicking the Company Name, you will be directed to its Details page.

2.22.3.2 Returning to DTR Summary Page

To return to the summary page after opening a specific DTR Document, click "Back to DTR Summary" (if you have opened a document in "Live" view) or "Back to DTR Archive" (if you have opened a document in "Archive" view) located at the Detail Count Section.

2.22.3.3 DTR Download Options & Printing

You may download a specific document/message currently shown in the Details Page in any of the following format: Hyper Markup Language (.html), Portable Document Format (.pdf) or Extensible Markup Language (.xml). You may also choose to send a PDF attachment through email.

- To download a specific document/message in HTML format, click the HTML button on the Download Options & Printing Section.

- To download a specific document/message in PDF format, click the PDF button on the Download Options & Printing Section.

- To download a specific document/message in XML format, click the XML button on the Download Options & Printing Section.

- To send a specific document/message as a PDF attachment through email, click the email button on the Download Options & Printing Section.

You may also print specific document/message shown in the Details Page resembling the official business document / message.

- To print a specific document / message, click the print button on the Download Options & Printing Section, and your browser's print preview page will be displayed. You may also input your preferred print settings.

2.22.3.4 Viewing DTR Document History

The Document History is located in the Document Statistics Section. In this section you may view the following user activities specific to a particular document/message:

1. Total number of times document/message has been viewed

2. Date and Time document/message was first viewed

3. Date and Time document/message was last viewed

4. Total number of times document/message has been downloaded

5. Date and Time document/message was first downloaded

6. Date and Time document/message was last downloaded

7. Comparison between user views and user downloads shown in graphs

8. A link to show document activity history details

    - To view the document history, click the "View document history".

- A pop-up box will show the document history for the opened DTR document.
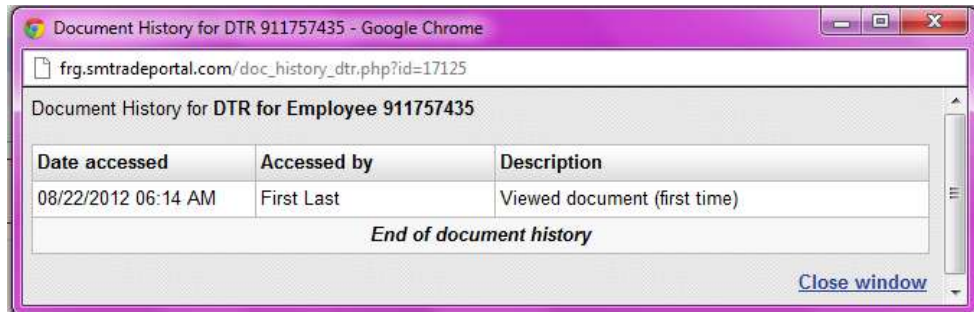
3   VENDOR COMMUNITY MANAGEMENT (VCM)

The Vendor Community Management application provides web-based access to the functions needed to manage bulletins in real-time, assuring updated bulletin or broadcast communication between users.

3.1   GETTING TO VCM HOME PAGE

To access the Vendor Community Management (VCM) home page

1. On the portal's Toolbar, click on "Portal Applications". It will then show the list of applications.

2. Click "Vendor Community Management" on the applications list.

3. You are now on the VCM home page. By default, it will display the Dynamic Bulletin System Page.

3.2 DYNAMIC BULLETIN SYSTEM (DBS)

The Dynamic Bulletin System module provides web-based access to all published bulletins and other information/announcement from SM. It also facilitates the viewing and accepting download rights to bulletins intended only for the vendor's account.

This is also the home page of the Vendor Community Management application.

3.2.1 Accessing the DBS Page

1. On the portal's Toolbar, you can either click the "Bulletins" button or the "Portal Applications" button.

2. If you click the "Portal Applications" button, select the "Vendor Community Management" from the drop-down list of applications.

3. This will bring you to the DBS page.
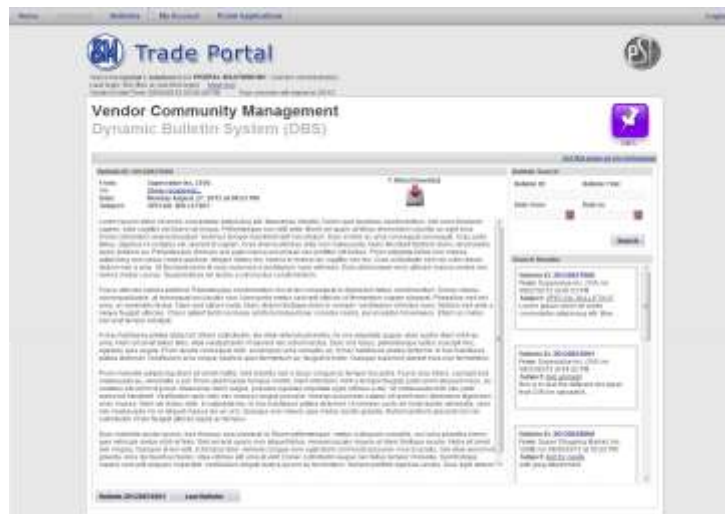
- You may also click the DBS button on the Application List Section to refresh or reload the page.

3.2.2 DBS Home Page Sections

The following are the sections of the DBS Home Page:

- Bulletin Display
- Bulletin Search
- Search Results
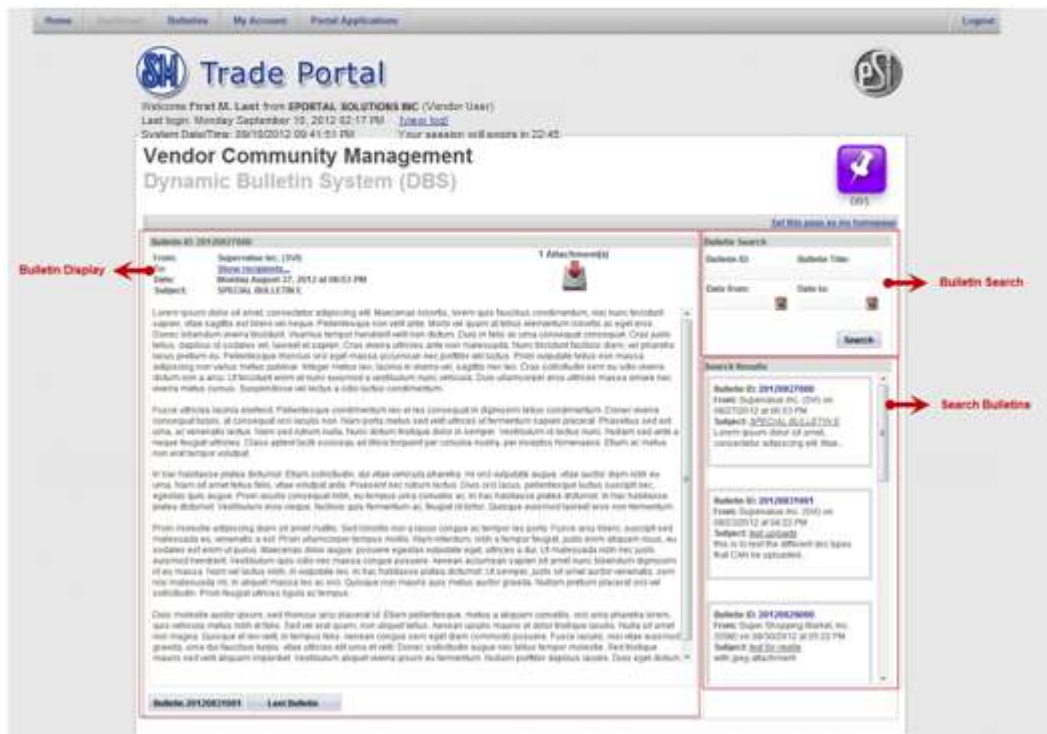
3.2.3 Bulletin Display Sections

The following are the sections of the Bulletin Display:

- Bulletin Header
- Bulletin Contents
- Attachments
- Agreement and Action Button

3.2.4 Viewing Bulletins & Downloading Attachments

Viewing Bulletins

A. Every time you log in, and if there is a new bulletin that you have not yet read, all functions of the portal are disabled until you confirm to have read the bulletin.

- *Case 1: If there is one new unread bulletin, click the "Continue" button, to enable all portal functionalities.*

- *Case 2: If there is more than one new unread bulletin, the button will show the label "Next".*

  1. Click the Next Button to display the next new bulletin that has not been read.

  2. After all the unread bulletins have been displayed; the label of the button becomes "Continue".

  3. Click the "Continue" button to enable all portal functionalities.

- *Case 3: If there are more than five new unread bulletins, the button will show the label "Next" until the 5th bulletin has been displayed.*

  1. After the 5th bulletin has been displayed, the label of the button becomes "Continue".

  2. *Once clicked, this notification will be shown to the Vendor: "You have more unread bulletins. The remaining unread bulletins will be displayed on the next login or you may access them through the "Bulletin" toolbar."*

  3. Click the "Ok" button to enable all portal functionalities.

Bulletins created before you registered to the SM Trade Portal will also be visible to you.

B. Only active bulletins will be visible on the DBS page.

In case you want to view the bulletins that you have already read, there are two buttons you may click on the DBS page to display previous bulletins. Click the corresponding button to view the bulletin.
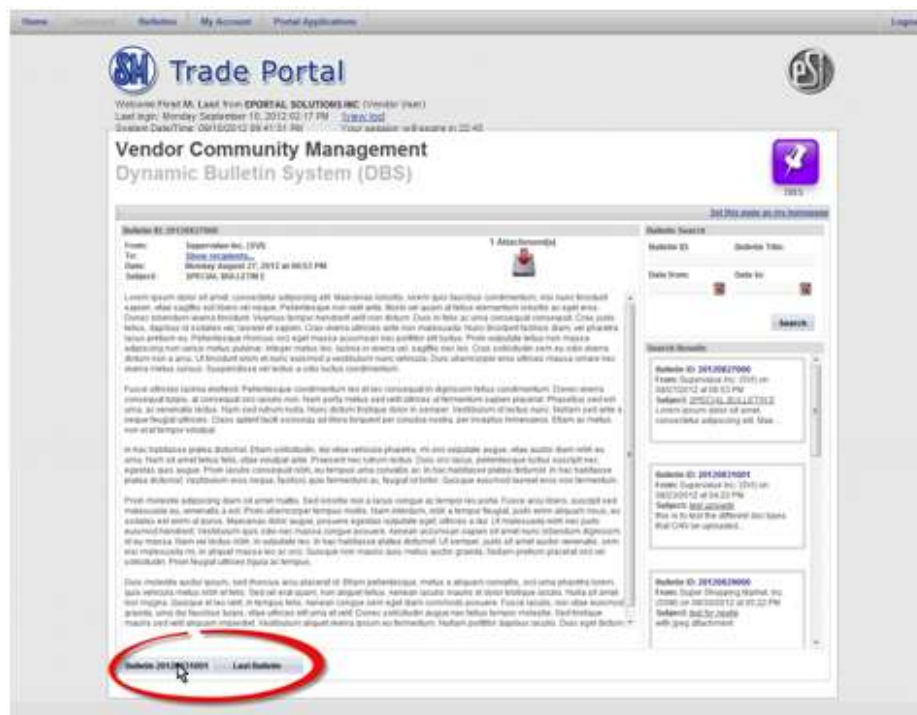
Downloading Attachments

If a bulletin has an attachment/s you may download it by clicking on the "Attachment" button.

Bulletin Display View

DBS Page View
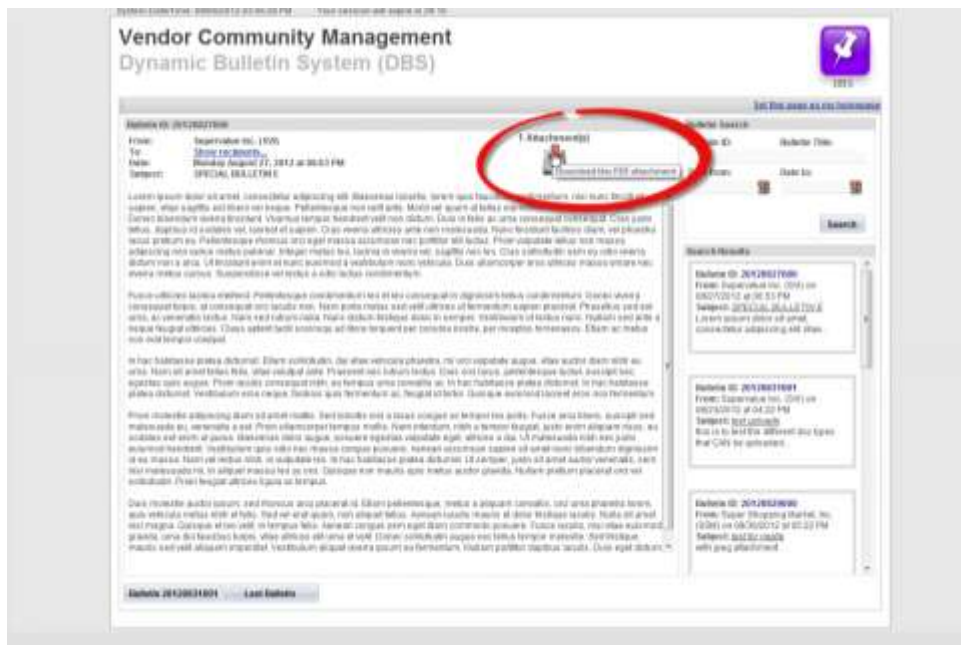
3.2.5 Bulletin Search Facility

You may search Bulletin using the following criteria:

a. Bulletin ID number
b. Bulletin Title
c. Published Date From/Published Date To

> *i* To get more accurate results, you may combine the criteria when you search.

a. To search for Bulletins using Bulletin ID Number

1. Key in the Bulletin ID number in the text box.

2. Click the Search button located at the bottom right.

3. After clicking the Search button, the results will be displayed.
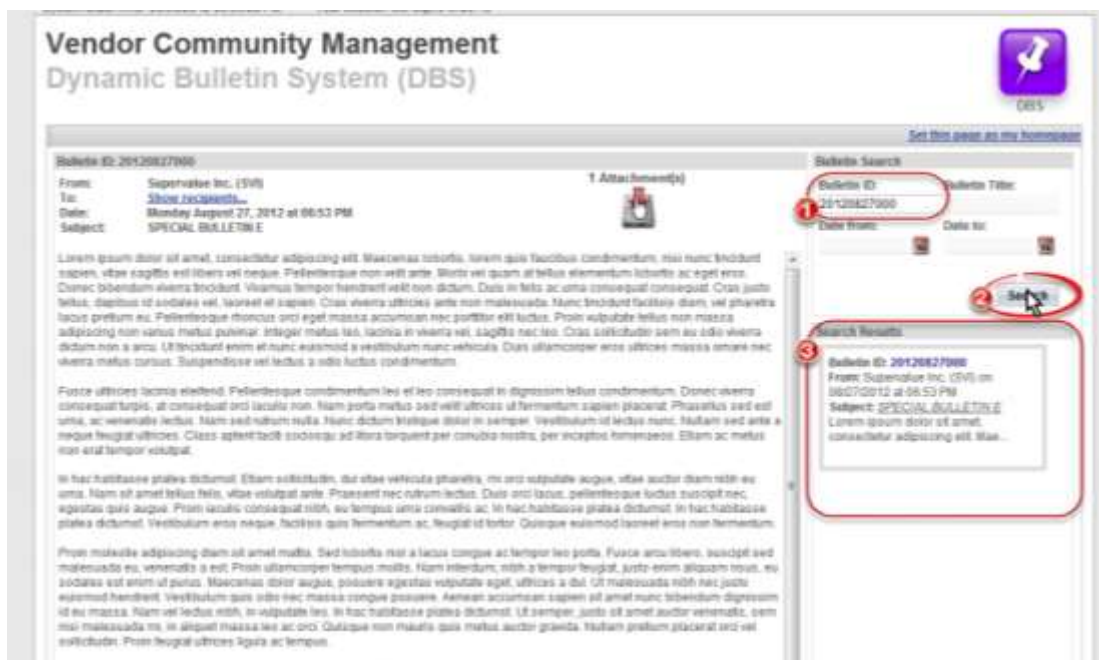
> *i* The maximum number of characters for the Bulletin ID number is 11. The text box accepts numeric characters only.

b. **To search for Bulletins using Bulletin Title**

1. Key in the Bulletin Title (or part of it) in the text box.

2. Click the Search button located at the bottom right.

3. After clicking the Search button, the results will be displayed.
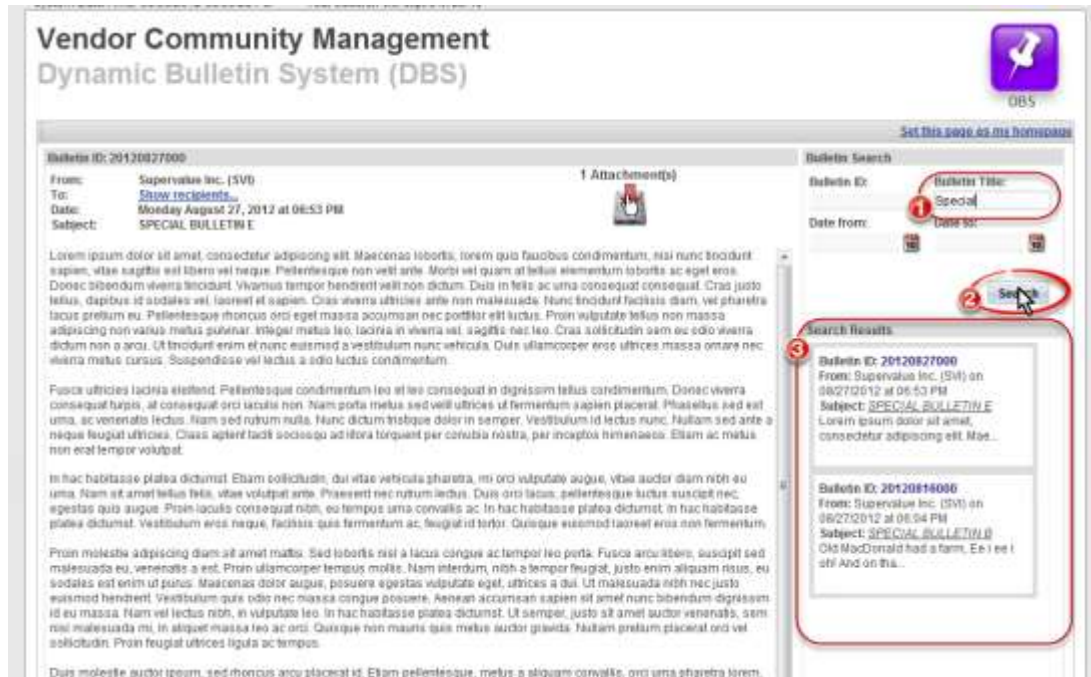
The maximum number of characters for the Bulletin Title is 60. The text box accepts alphanumeric and special characters.

c. **To search for Bulletins using Published Bulletin Date**

1. Manually key in the Published Date using the format 'mm/dd/yyyy' or you may also select the dates using the calendar.

2. Click the Search button located at the right side.

3. After clicking the Search button, the table will display the results.

The date 'To' indicated must be after the date 'From'. Dates before the indicated "From" date will not be accepted.

4 MY ACCOUNT

"My Account" facilitates the viewing and updating of all details about your user account.

4.1 ACCESSING MY ACCOUNT

1. On the portal's toolbar, click the "My Account" button.

2. You are now on "My Account" page.

4.2 PERSONAL ACCOUNT DETAILS

In the Personal Account Details Section, the personal information about the user is listed.

- You may update your personal information by clicking on the corresponding box that you want to edit:

    1. Type in your changes.

    2. Once done click the "Update" button.

3. The page will display a confirmation message: *"Your personal details were successfully updated."* Click the "Back to My Account" to go back to the home page.
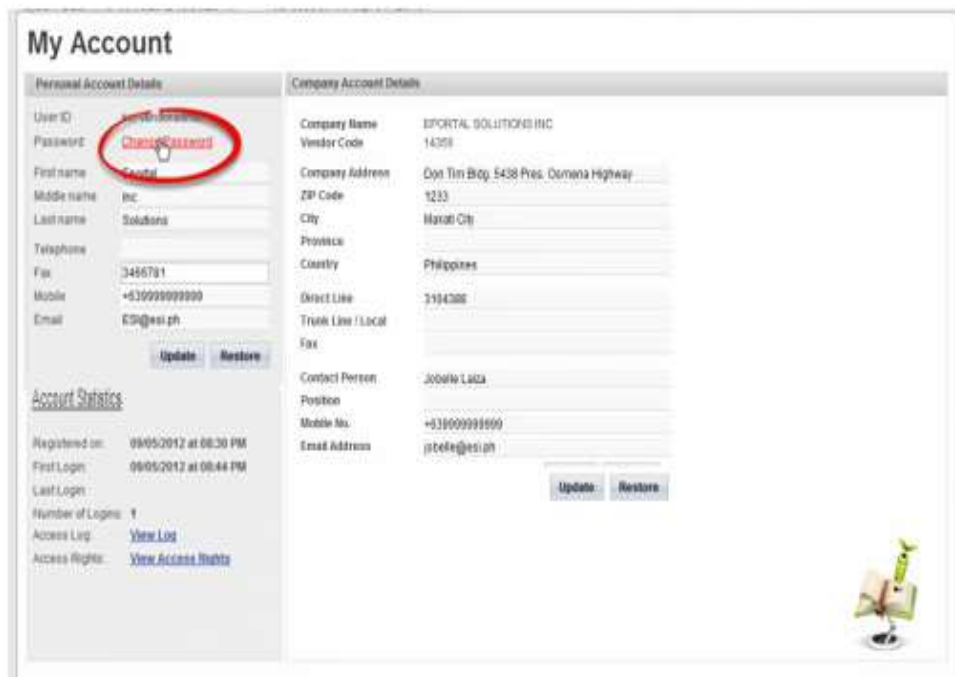
- To reset the personal account details to the last saved values, click the "Restore" button.

- To change your password:

  1. Click on the "Change Password".

2. A pop-up window will appear. Enter and confirm password. Click the "Save" button to save the changes. Otherwise, click "Cancel" button.

3. The page will display a confirmation message: *"Your password was successfully changed."* Click the "Login" button and you will be automatically logged out of the portal.

5.2.1 Account Statistics

Account Statistics displays information like when the account was registered, your first and last log-in details, and the number of logins you made.

You may also view your access logs and access rights by clicking on their corresponding text links.

Viewing Your Access Log

1. Click "View Log".
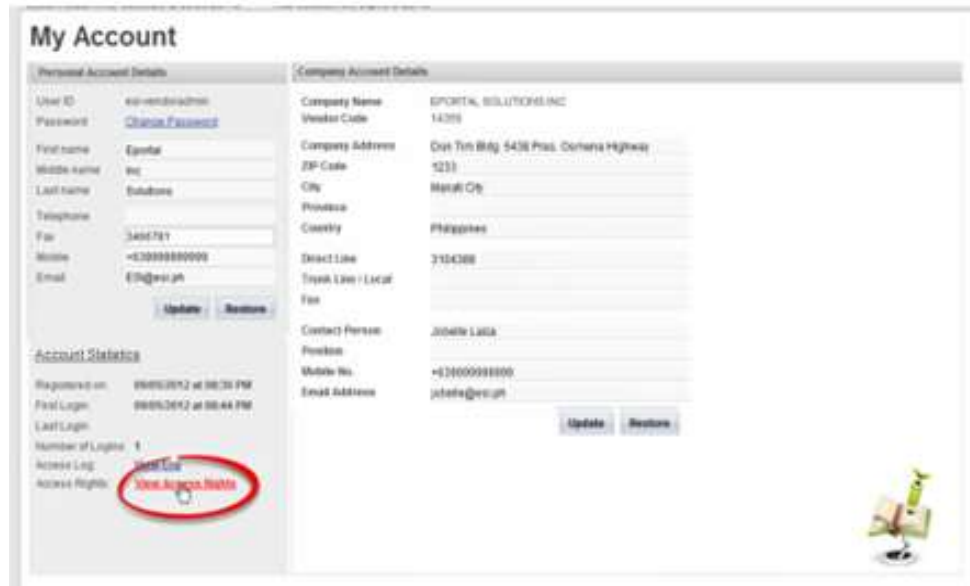
2. After clicking it, a pop-up window will appear showing your logs.
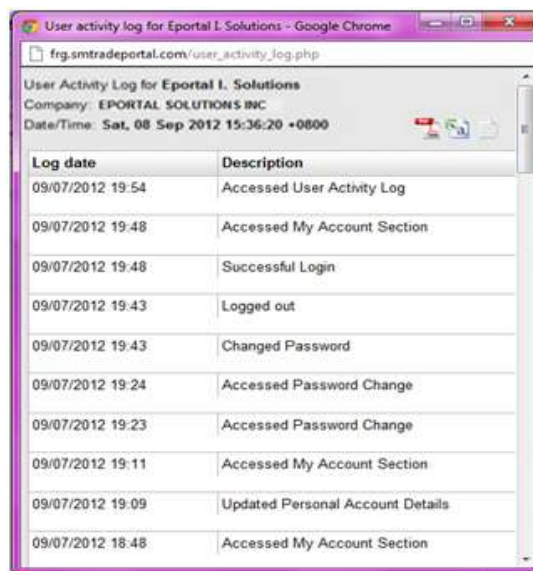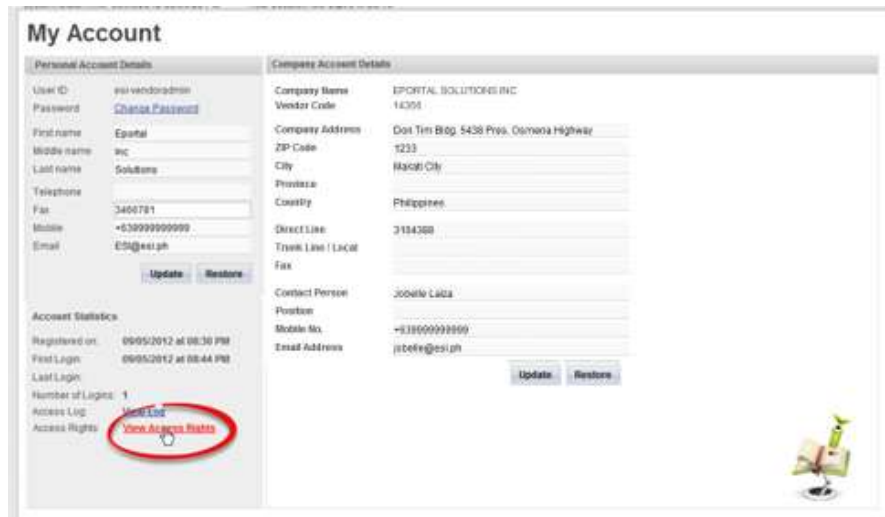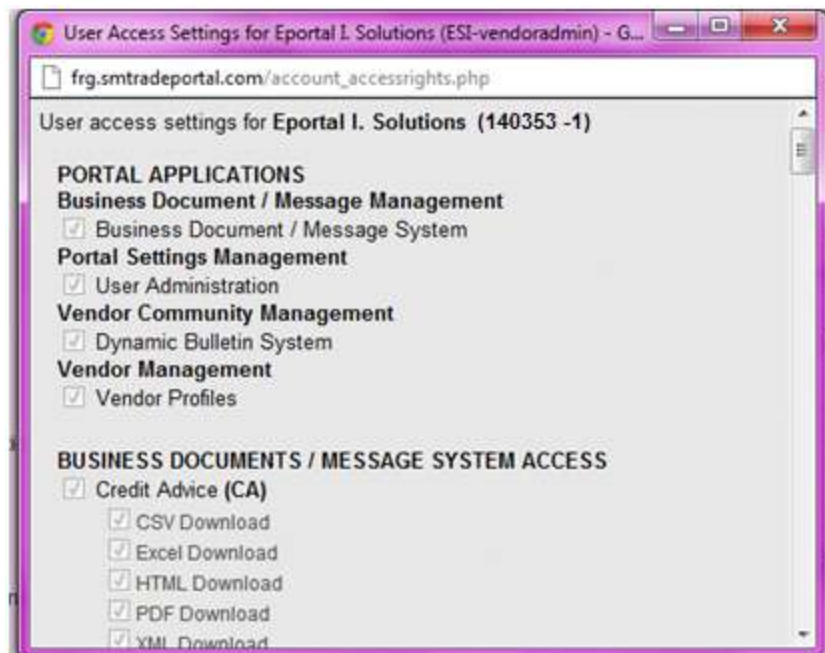
ℹ️ You may also export your logs in PDF, CSV, and plain text format. To learn more about exporting your logs in any of these file formats, go to "Viewing/Exporting Session Logs" Section.

Viewing Your Access Log

1. Click "View Access Right ".

2. A pop-up window will appear showing your access rights.

4.3 COMPANY ACCOUNT DETAILS

The Company Account Details Section displays some information about the company you belong to.

- You may update your company information by clicking on the corresponding text box that you want to edit.

1. Type in your changes.

2. Once done click the "Update" button.
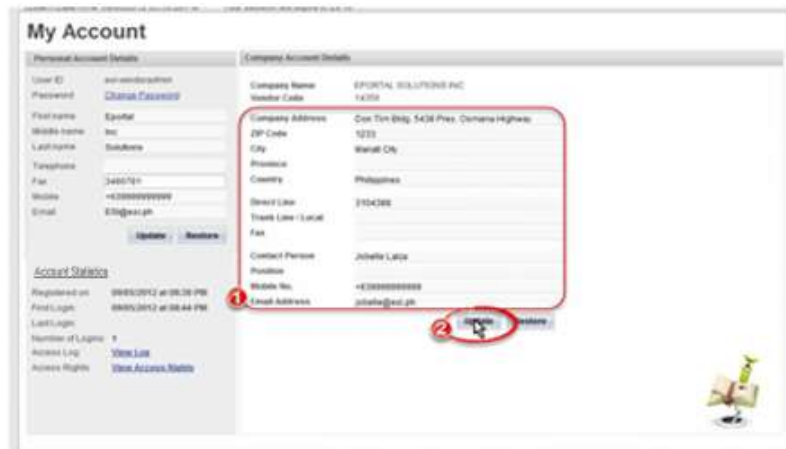
3. The page will prompt that "Your company account details were successfully updated. Click the "Back to My Account" to go back to the home page.

- To reset company account details to the last saved values, click the "Restore" button.

5 ABBREVIATIONS & GLOSSARY

ABBREVIATIONS

PDF – Portable Document Format
SMS – Short Message Service
CSV – Comma Separated Values
HTML – Hyper Markup Language
XML – Extensible Markup Language
BDMS – Business Documents/Message System
BDMM – Business Document/Message Management
VCM – Vendor Community Management
VM – Vendor Management
PO – Purchase Order
CPO – Consignor Purchase Order
GRN – Goods Receipt Notification
ICR – Invoice Confirmation Report
RTV – Announcement for Return to Vendor
RA – Remittance Advice
DMCM – Debit Memo/Credit Memo
CA – Credit Advice
SR – Service Receipt
RTVD – Return to Vendor Deduction
DSR – Daily Sales Report
DSRS – Daily Sales Report Summary
CLR – Consolidated Liquidation Report
EWT – Expanded Withholding Tax
DTR – Daily Time Record
UA – User Administration
DBS – Dynamic Bulletin System

GLOSSARY OF TERMS

A

Application software - Also known as an application or an app, is computer software designed to help the user to perform specific tasks.

B

Bulletin- A brief public notice usually issued by an authoritative source; specifically: a brief news item intended for immediate publication or broadcast

C

Comma-separated values (csv) – A file format that stores tabular data (numbers and) in plain- form. It consists of any number of records, separated by line breaks of some kind; each record consists of fields, separated by some other character or string, most commonly a literal comma or tab.

Computer hardware - Refers to the physical parts or components of a computer such as monitor, keyboard, hard disk, mouse, etc. Refers to objects that you may actually touch, like disks, disk drives, display screens, keyboards, printers, boards, and chips.

Computer system - A system of interconnected computers that share a central storage system and various peripheral devices such as a printers, smayners, or routers. Each computer connected to the system may operate independently, but has the ability to communicate with other external devices and computers.

D

Data archiving - The process of moving data that is no longer actively used to a separate data storage device for long-term retention, for it consists of older data that is still important and necessary for future reference, as well as data that must be retained for regulatory compliance.

Downloading - To receive data to a local system from a remote system, or to initiate such a data transfer. Examples of a remote system from which a download might be performed include a web server, FTP server, email server, or other similar systems.

Dynamic - Marked by continuous and usually productive activity or change.

E

Electronic mail - Also known as email or e-mail, it is a method of exchanging digital messages from an author to one or more recipients.

Email address - Identifies an email box to which email messages are delivered.

Exporting data - Transfer of electronic data out of a database or document in a format that may be used by other programs

Extensible Markup Language - A markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable.

F

File attachment - A file that has been attached to an email. It may be any file type, such as a document, photograph, image, audio file or any other file that may be accepted by an email program.

H

Hyper markup language (html) - The main markup language for displaying web pages and other information that may be displayed in a web browser.

M

Microsoft excel (.xls) - A commercial spreadsheet application written and distributed by Microsoft for Microsoft Windows and Mac OS X. It features calculation, graphing tools, pivot tables, and a macro programming language called Visual Basic for Applications.

P

Plain text - The contents of an ordinary sequential file readable as ual material without much processing, usually as opposed to formatted and to "binary files" in which some portions must be interpreted as binary objects (encoded integers, real numbers, images, etc.).

Portable Document Format (PDF) - A file format used to represent documents in a manner independent of application software, hardware, and operating systems. It encapsulates a complete description of a fixed-layout flat document, including the , fonts, graphics, and other information needed to display it.

Portal application - A web-accessible, interactive tool on a secured website that delivers both related and unrelated applications, services and s that should meet a customer's needs.

S

Screen resolution - The term used to describe the number of dots, or pixels, used to display an image.

Short Message Service(SMS) - A messaging service component of phone, web, or mobile communication systems, using standardized communications protocols that allow the exchange of short messages between fixed line or mobile phone devices.

T

Toolbar - A horizontal row or vertical column of select a ble image "buttons" in the graphical user interface (GUI) for a computer, that give the user a constantly visible reminder of and an easy way to select certain desktop or other application functions, such as saving or printing a document or moving pages forwards or backwards within a Web browser.

U

Uploading - The sending of data from a local system to a remote system such as a server or another client with the intent that the remote system should store a copy of the data being transferred, or the initiation of such a process.

W

Web browser - A software application for retrieving, presenting, and traversing information resources on the World Wide Web.

World Wide Web (www) - Commonly known as the Web. It is a system of interlinked hyper documents accessed via the Internet.

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