

ORDER BOOKING APP PROJECT

Aug 25, 2025

OVERVIEW

1. Project background and description

To streamline the way your sales team captures and manages customer orders — ensuring faster, more accurate, and integrated order processing with your ERP system.

2. Key Highlights

- Login
Log in using ERP Username & Password for secure authentication.

NEW AGE - LOGIN

NEW AGE
DISTRIBUTION

Welcome Back!

 Enter your username

 Enter your password

LOGIN

Powered By **CARTZ Link LLC**

- Refresh Master Data
Sync the latest Items, Stores, and Departments from ERP.

 **New Age**
REFRESH DATA ●


REFRESH ITEMS
Last Sync: N/A


REFRESH STORE


REFRESH DEPARTMENTS


LOG CHECK

← **BACK**

- Item CataLog

New Age
ITEM CATALOG

New Age

Products List in FROZEN INVOICE


Search All


BY ERP Department


BY ERP Category


BY ERP Flag

← BACK

 Search product by name

Total Products: 61

AL PASTOR 10LBS GST
Code: 02145878824566
Unit: | Case Size:
Price: \$37.00 In-hand: 96

AL PASTOR MARINATED
Code: 01234567896541
Unit: | Case Size:
Price: \$3.20 In-hand: 100

ALBONDIGAS A LA ITALIANA
Code: 55555512042024
Unit: | Case Size:
Price: \$4.80 In-hand: 1533.59

**ARROZ A LA MEXICANA RICE MEX STYLE
6/5LBS GST**
Code: 01236978569321
Unit: | Case Size:
Price: \$97.00 In-hand: 40

AVOCADO PULP 4/6LB (24LB CASE)
Code: 55555511082024
Unit: | Case Size:
Price: \$97.00 In-hand: 84

- **Select Store**
Choose the target Store where the order will be placed.

New Age
CHOOSE ACTIVE CUSTOMER

Filter customers by name, code, or ID...

LA MEXICANA MARKET
Customer Code: 3
Customer ID: 2225

JDS SUPER MARKET 6
Customer Code: 4
Customer ID: 2226

New Age
Select Your Store

2226 - 4
JDS SUPER MARKET 6

← BACK SEARCH DETAIL

← BACK

- Order Entry Screen
 Navigate to the order screen. Filter products by Flag-wise, Category, or Department.

New Age - ITEM ORDER
STORE: 2226

ITEM ORDER

PRICE CHANGE

STANDING ORDER

TAG ORDER

TPR

New age - ITEM ORDER
STORE: 2226

FLAG *
DS

STORE PARTITION *
GENERAL / GROCERY

PO *
3880700729001

COMMENTS

STORE ACCOUNT *
388070

DELIVERY DATE
07/31/2025 ✕

← BACK

← BACK

NEXT →

- Add Items to Order
 - Scan barcodes using device camera/scanner
 - View real-time stock, price, and available quantity
 - Add or remove items easily

Scan code

**New Age
ITEM ORDER
STORE:**

FLAG PARTITION DS - 97393

Enter UPC / Code / Name / ID

LOOKUP ITEM

DOVE INVISIBLE DRY
6/150ML
\$16.69 × 2 = \$33.38

In hand: 18

2

X

+

TOTAL ITEM QTY 2	TOTAL CUBE 0.00
TOTAL \$ EST VALUE \$33.38	TOTAL \$ ALLOWANCE \$0.00

Scanned by Google on behalf of Warehouse Ordering Application

BACK SEARCH DEALS HOLD SCAN SEND

- Hold Order (Optional)
 - Save the order temporarily using the Hold feature
 - Hold orders are automatically deleted after 24 hours if not resumed

New Age - SEND ORDERS

New Age - HOLD ORDERS

Store Wise

Order# ORD250710192-0006

Items: 3 **Qty:** 4

PO: 3880700710001

Comments:

Cube:

Total Value: \$21.46

Customer:

Delivery: 2025-07-10

PENDING

 SEND

Order# ORD250709192-0004

Items: 0 **Qty:** 0

PO: 3875940709001

Comments:

Cube:

Total Value: \$0.00

Customer:

Delivery: 2025-07-09

PENDING

 SEND

Order# ORD250709192-0003

Items: 0 **Qty:** 0

PO: 3880700709001

PENDING

🔍 Search by Order ID or Flag

Total Hold Orders: 2

Order ID: ORD250729192-0008

Customer ID: 2226

Flag: (97393)

Hold At: 2025-07-29 19:30:12

Comments:

VIEW

 RESUME

Order ID: ORD250729192-0007

Customer ID: 2226

Flag: (97393)

Hold At: 2025-07-29 19:29:49

Comments:

VIEW

 RESUME

BACK

BACK

- Other Operation

 New Age REVIEW ORDERS	 New Age OTHERS OPTION
 View Device Orders	 SCAN TO PRINT
 View Device Hold Orders	 SCAN TO PRINT w/SRP CHANGE
 View Device Hold New	 BACKROOM INVENTORY
 View ALL Previous Store Orders	← BACK
← BACK	

CARTZLINK ORDERING APP
Version 0.0.1


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OPERATIONAL GUIDE


SCAN DEBUGGING


DEBUG

← BACK

Total Orders

0

Last Login

7/29/2025, 6:33:27 PM

Total Stores

0

Total Items

0

🕒 Login History

🕒 **Login Session 1**
Time: 7/29/2025, 6:33:27 PM
IP Address: 0.0.0.0

🚪 LOGOUT

- User Detail Information Last login Total orders stores and items and Login session Detail

- Send (Local Save)
 - Click Send to locally save the order
 - A success message confirms local storage
- Sync with ERP
 - From the Send Orders screen, click Send again
 - The order is pushed to the ERP as a Sales Order
- View Orders
 - Monitor Held, Pending, and Sent orders
 - Filter by status, date, and store
- Dashboard Summary (Our Option)
- See Total Orders, Inventory, Pending vs Sent Orders
- Helps monitor progress and stock in real time

4. Affected Parties in the Order Booking Process

1. Sales Team

- Uses the system to book orders in the field
- Benefits from real-time inventory and pricing
- Reduced manual entry and follow-ups

2. Store / Warehouse Staff

- Receive orders placed by sales team
- Responsible for dispatch & inventory handling
- Must keep accurate stock levels in sync

3. Accounts & Finance Team

- Orders sync with ERP, affecting invoices and billing
- Handles payment follow-up based on booked orders

4. Inventory Management Team

- Must ensure accurate stock availability in ERP
- Handles real-time stock updates and shortage alerts

5. Management / Business Owners IN ERP

- Monitors sales performance and order trends
- Uses dashboard reports for decision-making
- Benefits from higher operational transparency

6. IT / ERP Team

- Manages system integration and support
- Ensures data sync between device and ERP
- Handles issues like login, sync failures, and updates

3. High-level timeline/schedule

Phase	Task Description	Timeline
Phase 1	Requirement Gathering, System Design	Week 1
Phase 2	ERP Integration Setup, Item/Store/Department Sync	Week 2
Phase 3	Mobile App & Web Portal Development	Week 2–3
Phase 4	Product & Customer Data Upload	Week 3
Phase 5	Testing (Internal & UAT – User Acceptance Testing)	Week 4
Phase 6	Sales Team Training + Device Setup	Week 5
Phase 7	Pilot Go-Live (2-5 Stores)	Week 6
Phase 8	Full Rollout (All users and stores)	Week 7