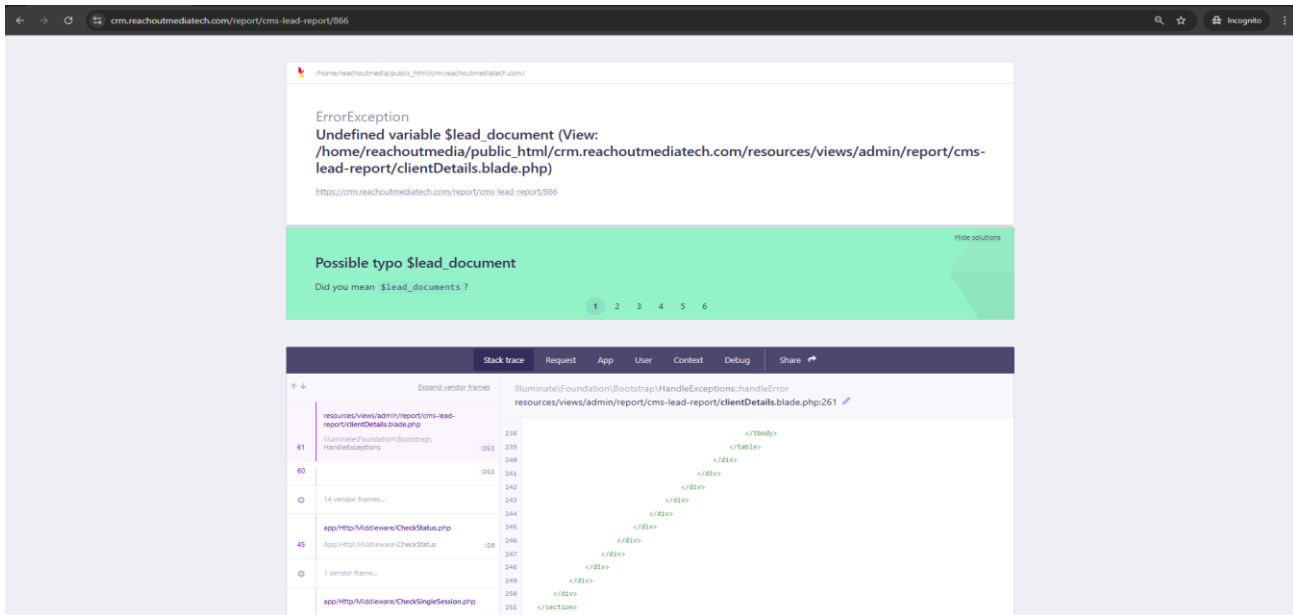


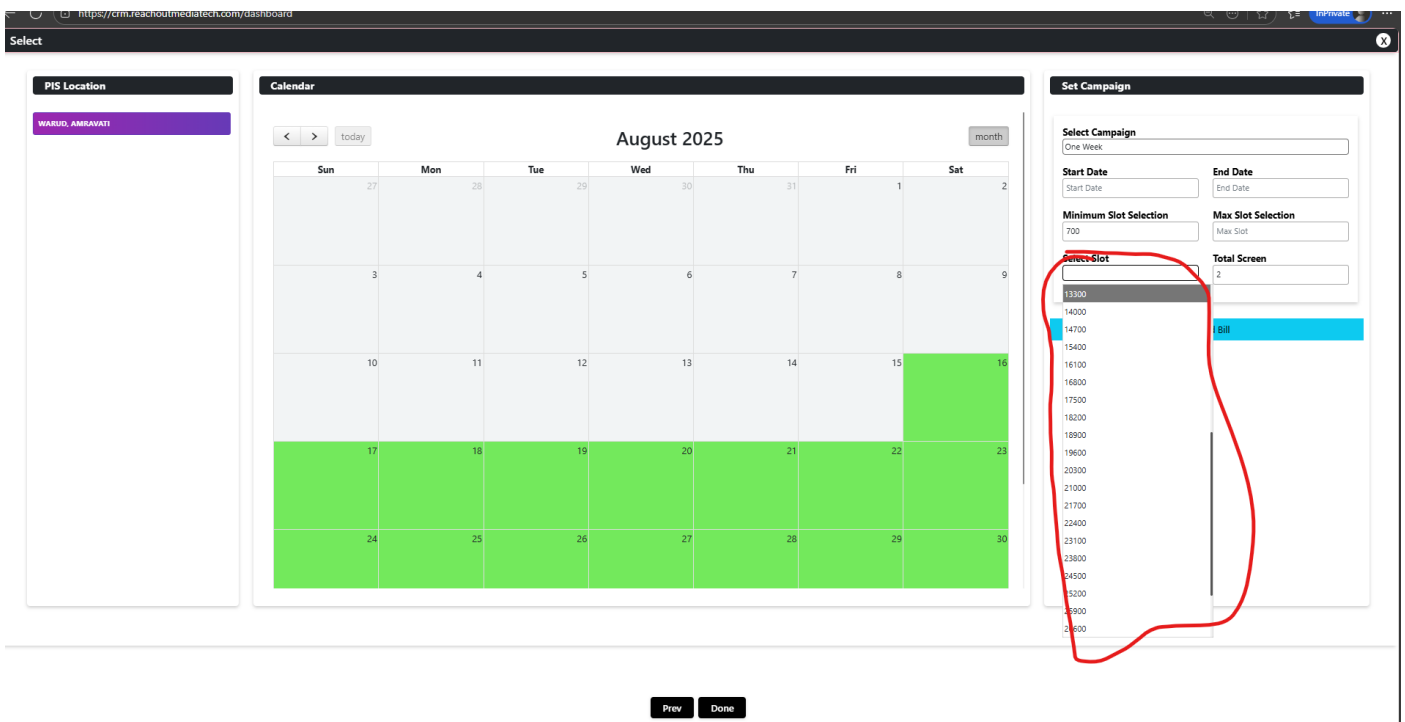
Test Cases CRM-CMS

1) Higher Authority Portal:

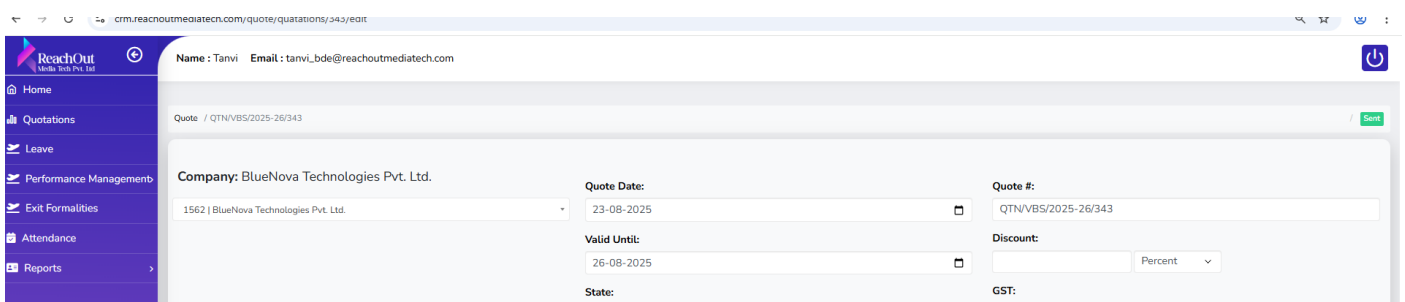
An exception is occurring when accessing the *View Details* option.



3) The slot selection dropdown is currently displaying an excessive number of rows. This should be restricted to a maximum of 42 slots only, in alignment with the campaign structure.



4) **Sent** label in Quotation in **Green** background



5) Invoice no is not as per settings in superadmin and sent lable in Invoice

ReachOut Media Pvt. Ltd.

Name: Suhas Email: suhas_am@reachoutmediatech.com

Invoice / QTN/VBS/2025-26/70

Company: BlueNova Technologies Pvt. Ltd.

Invoice Date: 23-08-2025

State: 27 | Maharashtra

Invoice #: QTN/VBS/2025-26/70

Discount: Percent

GST: 18% 9% 9%

Sr. no.	Campaign	Location	HSN/SAC	Total Slot	Screen Count	Unit Cost	Line Total
1	One Week	SATARA CENTRAL BUS STAND	998365	1050	3	16.95	17796.61
2	One Week	MAHABALESHWAR CENTRAL BUS STAND	998365	4900	2	16.95	83050.84

Terms Footer ShipTo ShipTo Name

1) Payment Terms - 100% Advance before campaign start.
2) All relevant term & conditions have been outlined in the attached document and shall be confirmed via email.

Subtotal: Rs. 100847.45
Discount: () 0
Tax: Rs. 36305.08
Total: Rs. 137152.53

ReachOut Media Pvt. Ltd.

Name: Super Admin Email: superAdmin@gmail.com

cm.reachoutmediatech.com/quote/settings/create

Invoice Quote Settings:

Quote Settings

Quote Prefix: QTN/VBS/2025-26/

Submit

Invoice Settings

Invoice Prefix: INV/VBS/2025-26/

6) Flow in case of Payment is not accurate and ERP rejects the lead.

cm.reachoutmediatech.com/dashboard

Mentor Name: Tanvi

Status LEAD ID: 1562

Dashboard List

Company Name: Enter Company Name

Mobile: Enter Mobile No.

Lead Id: Enter Lead Id

Search

Tanvi: Beetel Quotation Sent
Tanvi: BlueNova Technologies Pvt. Ltd. Rejected
Tanvi: AbcLtd Proceed To QC
Tanvi: Kirloskar Brothers Limited Proceed To QC

Summary

New Lead	4
Payment Done	1
Proceed To QC	10
Rejected	0
ERP Approved	0
Follow Up	4
Quotation Sent	3
Ticket Raised	0

Company & Personal

Company Name: BlueNova Technologies Pvt. Ltd.

Mobile No. 9823045678 Alternative No. Enter Alternative Mobile No

Person Name: Abhinandan

Company Area: Pune Company Address: 412, Techno Park, Phase 3, Hirjewadi

Sector: Media and Entertainment Nature of sector: media Company

Position: CEO Email Id: contact@bluenovatech.in

GST No. 27AABC81234Q125

Concern Person: Shivam

Position: head of marketing

Mobile No. 9887345465 Email Id: dhanirayshilpatil1@gmail.com

Opportunity

Project: Select Status

Creatives: YES

Preview Create Link

Advertisement Area

Payment Mode: Online

Payment Details

UTR/UPI: dfgghk134567890

Taxable Amount: 100847.45 After Discount Amount: 0

Discount: 0 Invoice Total: 118999.99

TDS: 2.00 Paid Amount: 116983.00000

Payment Slip: Choose Files No file chosen

Action & Disposition

Lead Date: 2025-08-23 11:35:11

Status: Proceed To QC Status Details: Creatives Receive

Date: 2025-08-23 Time: 13:38:00

Remark: Remark

History

Suhas: 2025-08-23 13:38:27 Lead Updated By Suhas And Transferred In Rejected And Reason: Payment not correct

Tanvi: 2025-08-23 13:36:37 Got Payment by client

Suhas: 2025-08-23 13:12:44 Lead Updated By Suhas And Transferred In Approved And Reason: Invoice sent to client

Tanvi: 2025-08-23 12:59:37 Sent to ERP for invoice

Tanvi: 2025-08-23 12:21:11 Ask for lead locations

CRM Dashboard - Lead ID: 1562

Status

Dashboard | List

Company Name*
Enter Company Name

Mobile*
Enter Mobile No.

Lead Id
Enter Lead Id

Search

View Desk

poorja Darshan

Pranav Tech

Company & Personal

Company Name
BlueNova Technologies Pvt. Ltd.

Mobile No. 9823045678 Alternative No. Enter Alternative Mobile No

Person Name
Abhinandan

Company Area Pune Company Address 412, Techno Park, Phase 3, Hirjewadi

Sector Media and Entertainment Nature of sector media Company

Position CEO Email Id contact@bluenovatech.in

GST No. 27AABCB1234Q123

Concern Person Shivam

Position head of marketing

Opportunity

Project Select Status

Creatives YES

Preview Create Link

Advertisement Area

Payment Mode Online

Payment Details

UTR/UPI dghjkl34567890

Taxable Amount	100847.45	After Discount Amount	0
Discount	0	Invoice Total	118999.99
TDS	2.00	Paid Amount	116983.00000

Action & Disposition

Lead Date 2025-08-23 11:35:00

Status Proceed To QC

Date 2025-08-23

Remark

History

- 2025-08-23 11:35:00 Lead Updated By correct
- 2025-08-23 11:35:00 Got Payment by client
- 2025-08-23 11:35:00 Lead Updated By client

Order Status

BDE 2025-08-23 13:55:00

ERP (Suhas) 2025-08-23 13:38:27

Quality Assurance (Ankita Londhe) 2025-08-23 13:55:00

Higher Authority ()

IT ()

Summary

New Lead	4
Payment Done	0
Proceed To QC	11
Rejected	0
ERP Approved	0
Follow Up	4

7) Concern person e-mail should be taken by default for email interactions

CRM Dashboard - Lead ID: 1562

Status

Dashboard | List

Company Name*
Enter Company Name

Mobile*
Enter Mobile No.

Lead Id
Enter Lead Id

Search

Tanvi : Beetal Quotation Sent

Tanvi : BlueNova Technologies Pvt. Ltd. Rejected

Tanvi : Abc.ltd Proceed To QC

Tanvi : Kirloskar Brothers Limited Proceed To QC

Company & Personal

Company Name
BlueNova Technologies Pvt. Ltd.

Mobile No. 9823045678 Alternative No. Enter Alternative Mobile No

Person Name
Abhinandan

Company Area Pune Company Address 412, Techno Park, Phase 3, Hirjewadi

Sector Media and Entertainment Nature of sector media Company

Position CEO Email Id contact@bluenovatech.in

GST No. 27AABCB1234Q123

Concern Person Shivam

Position head of marketing

Opportunity

Project Select Status

Creatives YES

Preview Create Link

Advertisement Area

Payment Mode Online

Payment Details

UTR/UPI dghjkl34567890

Taxable Amount	100847.45	After Discount Amount	0
Discount	0	Invoice Total	118999.99
TDS	2.00	Paid Amount	116983.00000

Action & Disposition

Lead Date 2025-08-23 11:35:11

Status Proceed To QC

Date 2025-08-23

Remark

Update

Summary

New Lead	4
Payment Done	1
Proceed To QC	10
Rejected	0
ERP Approved	0
Follow Up	4
Quotation Sent	3
Ticket Raised	0

SMS

Lead : BlueNova Technologies Pvt. Ltd. Mobile : 9823045678

SEND WHATSAPP SEND SMS **SEND MAIL**

contact@bluenovatech.in

CC (comma separated)

Subject

Compose your message...

Send Attach

8) Latest Quotation is getting selected for invoice and further process

ReachOut
Web 3.0 Pvt. Ltd.

Home
Change Password
Performance Management
Exit Formalities
Attendance
Reports
Higher Authority Lead Report

Name : Mahavir Sir Email : mahavir@reachoutmediatech.com

BlueNova Technologies Pvt. Ltd.

Screen Selection

Location ATI CHANDUR BAZAR, AMRAVATI	Total Screens 4	Total Slots 6650
Campaign Start Date 08-09-2025	Campaign End Date 14-09-2025	
Taxable Amount 100847.4500	Discount 0 %	GST 27%
Invoice Total 118999.9900	TDS 2.00%	Paid Amount 116983.00000

Documents & Creatives

Documents

Creatives

Lead History

Sr.	BDE Name	Action Date	Action Time	Remark
1	Tanvi	2025-08-23	11:35:00	New Lead
2	Tanvi	2025-08-23	11:35:00	Ask for ad locations
3	Tanvi	2025-08-23	11:35:00	Sent to ERP for invoice
4	Suhas	2025-08-23	11:35:00	Lead Updated By Suhas And Transferred In Approved And Reason: Invoice sent to client

9) When I create/download creatives for particular week, they should not get mix with other week folders.

next_week_creatives

Downloads > next_week_creatives

Search next_week_creatives

Name	Date modified	Type	Size
Today			
chandur-bazar-amravati1	23-08-2025 14:41	File folder	
daryapur-amravati1	23-08-2025 14:41	File folder	
amravati2	23-08-2025 14:41	File folder	
amravati1	23-08-2025 14:41	File folder	
Yesterday			
gadhinglaj-central-bus-stand4	22-08-2025 18:01	File folder	
gadhinglaj-central-bus-stand3	22-08-2025 18:00	File folder	
gadhinglaj-central-bus-stand2	22-08-2025 18:00	File folder	
gadhinglaj-central-bus-stand1	22-08-2025 18:00	File folder	
kagal-central-bus-stand2	22-08-2025 18:00	File folder	
kagal-central-bus-stand1	22-08-2025 18:00	File folder	
kolhapur-central-bus-stand5	22-08-2025 18:00	File folder	
kolhapur-central-bus-stand4	22-08-2025 18:00	File folder	
kolhapur-central-bus-stand3	22-08-2025 18:00	File folder	
kolhapur-central-bus-stand2	22-08-2025 18:00	File folder	
kolhapur-central-bus-stand1	22-08-2025 18:00	File folder	

daryapur-amravati1

Details

Type File folder

File location C:\Users\user1\Downloads\ne...

Date modified 23-08-2025 14:41

Properties

Lead's

< 08-Sep-2025 - 14-Sep-2025 >

Sr.No	Lead Id	BDE Name	Company Name	Campaign	Location's	Slot's	Total Screens
1	1562	Tanvi	BlueNova Technologies Pvt. Ltd.	One Week	AMRAVATI	2800	2
					DARYAPUR, AMRAVATI	1750	1
					CHANDUR BAZAR, AMRAVATI	2100	1

Close Download

Lead's

< 📅 > 01-Sep-2025 - 07-Sep-2025

Sr.No	Lead Id	BDE Name	Company Name	Campaign	Location's	Slot's	Total Screens
1	1561	Nikhil Ghan	shubham properties	One Week	KOLHAPUR CENTRAL BUS STAND	1750	5
					KAGAL CENTRAL BUS STAND	8400	2
					GADHINGLAJ CENTRAL BUS STAND	1400	4

CloseDownload

- FTP connectivity
- WhatsApp integration()
- SmartFlo integration(API already given)
- Tally API creation
- Lead Distribution Cycle (Leads from social media)
-
- BDM and PM portal
- SuperAdmin Reports
-