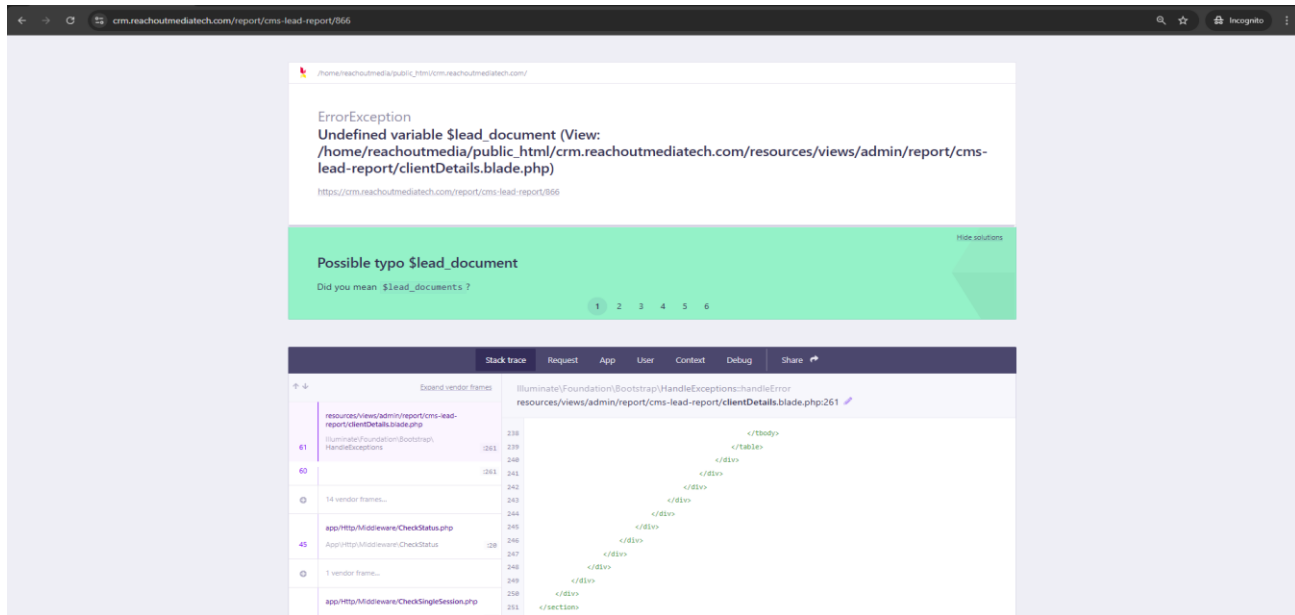


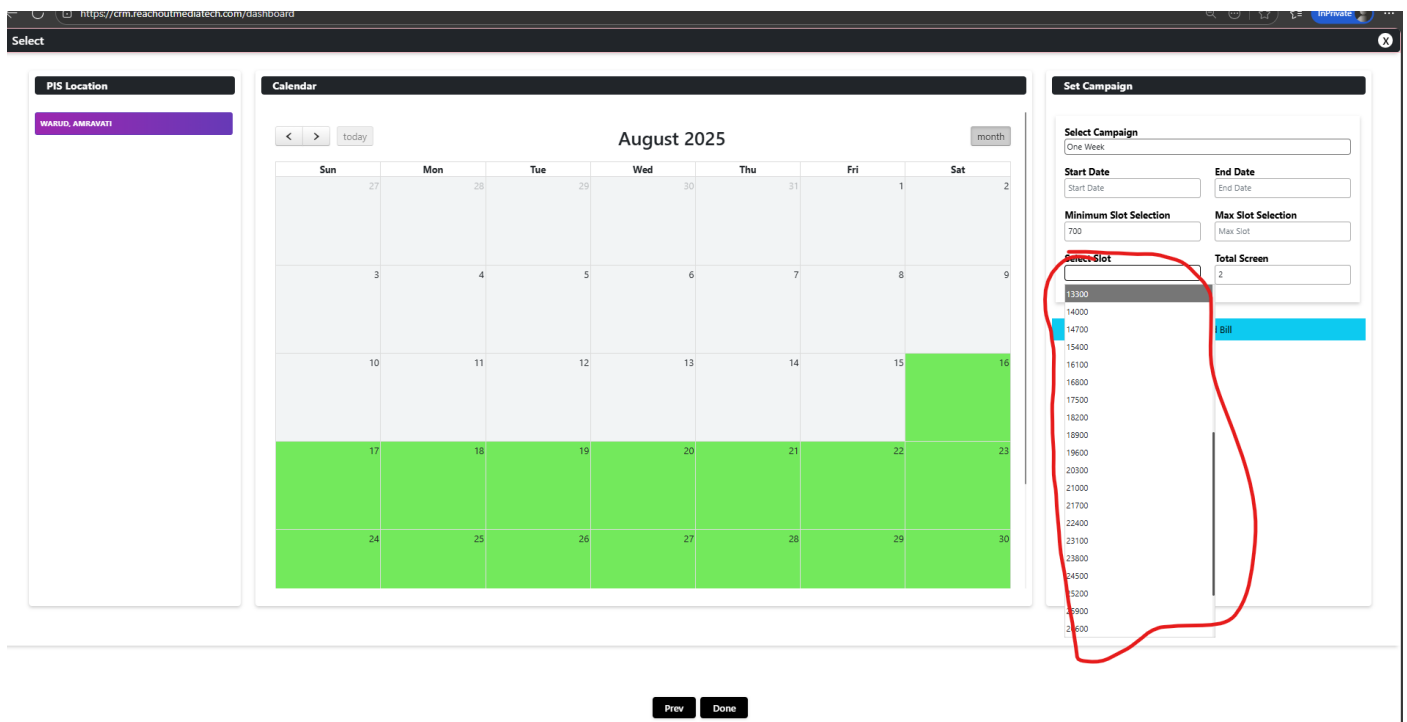
Test Cases CRM-CMS

1) Higher Authority Portal:

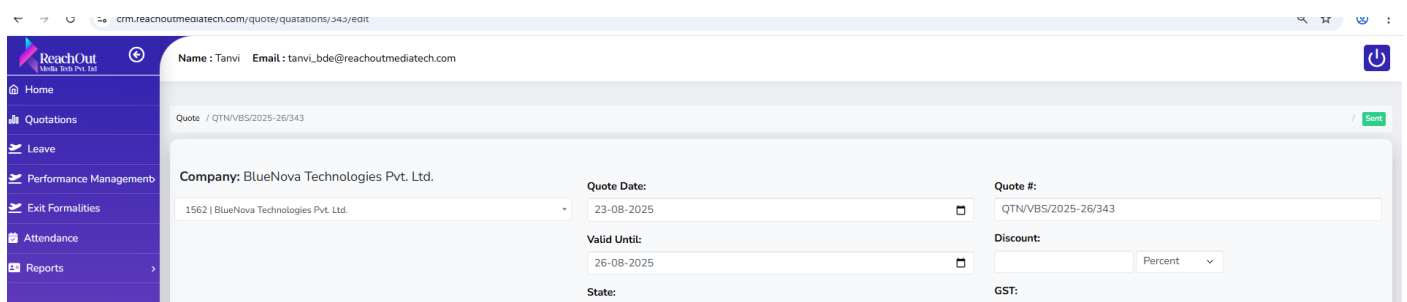
An exception is occurring when accessing the *View Details* option.



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** table 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: 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, Hirjew

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: dharishipatil1@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

Tanvi: 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

Tanvi: 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

Summary

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

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 dthghk34567890

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

Action & Disposition

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

Status
Procced To QC

Date
2025-08-23

Remark

History

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 ()

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 : Beetel Quotation Sent

Tanvi : BlueNova Technologies Pvt. Ltd. Rejected

Tanvi : Abc.ltd Procced To QC

Tanvi : Kirloskar Brothers Limited Procced To QC

Summary

New Lead	4
Payment Done	1
Procced 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. 27AABCB1234Q123

Concern Person Shivam

Position head of marketing

Mobile No. 9887545465 **Email Id** chairayshilpatil1@gmail.com

Opportunity

Project
Select Status

Creatives
YES

Preview **Create Link**

Advertisement Area

Payment Mode
Online

Payment Details

UTR/UPI dthghk34567890

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

Payment Slip
Choose Files | No file chosen

Action & Disposition

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

Status
Procced To QC

Date
2025-08-23

Remark

Update **Send**

SMS

Lead : BlueNova Technologies Pvt. Ltd. Mobile : 9823045678

SEND WHATSAPP **SEND SMS** **SEND MAIL**

Compose your message...

contact@bluenovatech.in

CC (comma separated)

Subject

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

https://cm.reachoutmediatech.com/report/cms-lead-report/881

Private

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

Home

Gallery

OneDrive

Desktop

Downloads

Documents

Pictures

Music

Videos

Documents to P

Screenshots

New client Videos

This PC

Network

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
-