Management Guide

How to use the Tasks and Finance pages

A simple step-by-step guide for the Management role.
Easy English · Numbered steps · Real screenshots with red circles.

How to read the pictures: A **red circle** means “look here” or “click here.” The **red numbers** (1, 2, 3…) match the numbered steps.

Part 1

The Tasks page

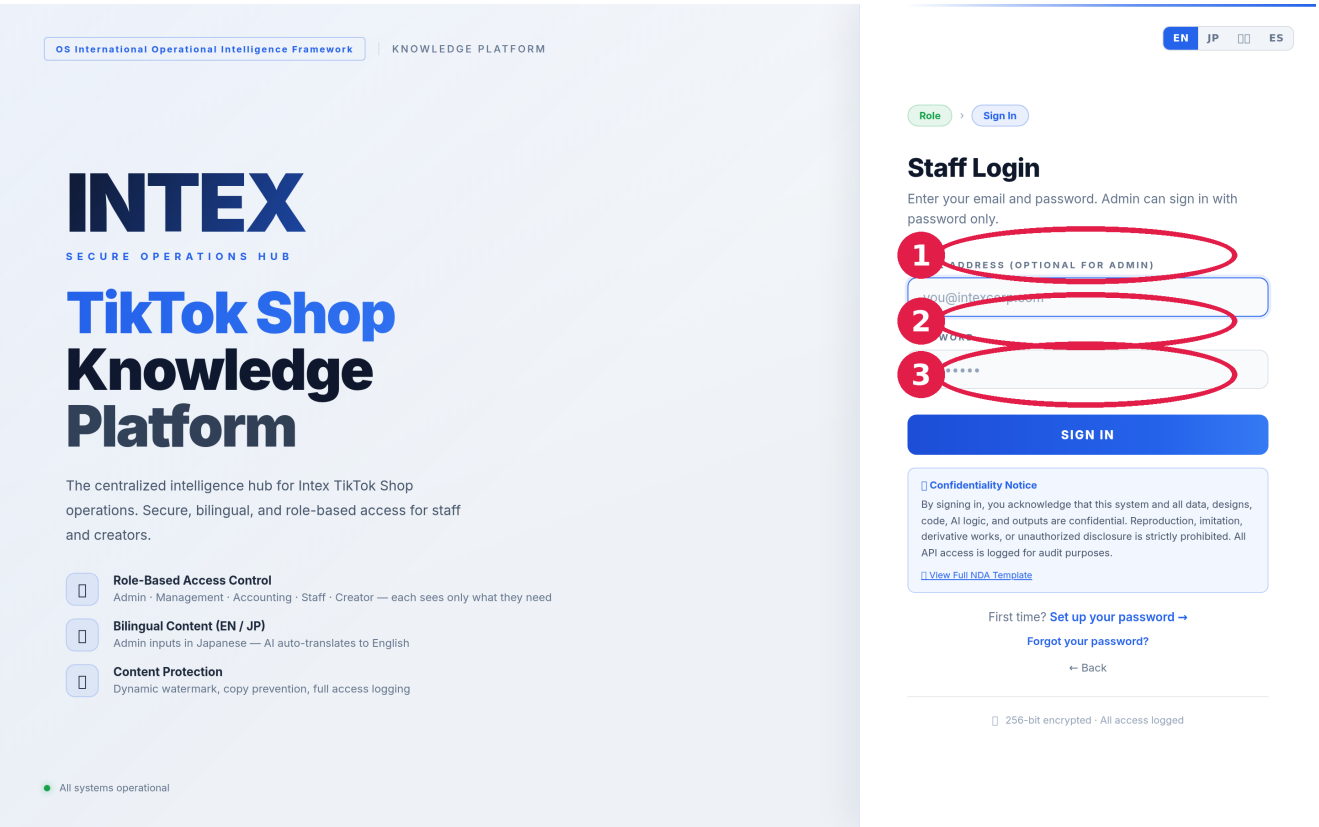
1.1 Sign in to the portal

First you need to log in with your work email and password.

1 Type your **email address** in the first box.

2 Type your **password** in the second box.

3 Click the blue **SIGN IN** button.



1 Email · 2 Password · 3 Sign In

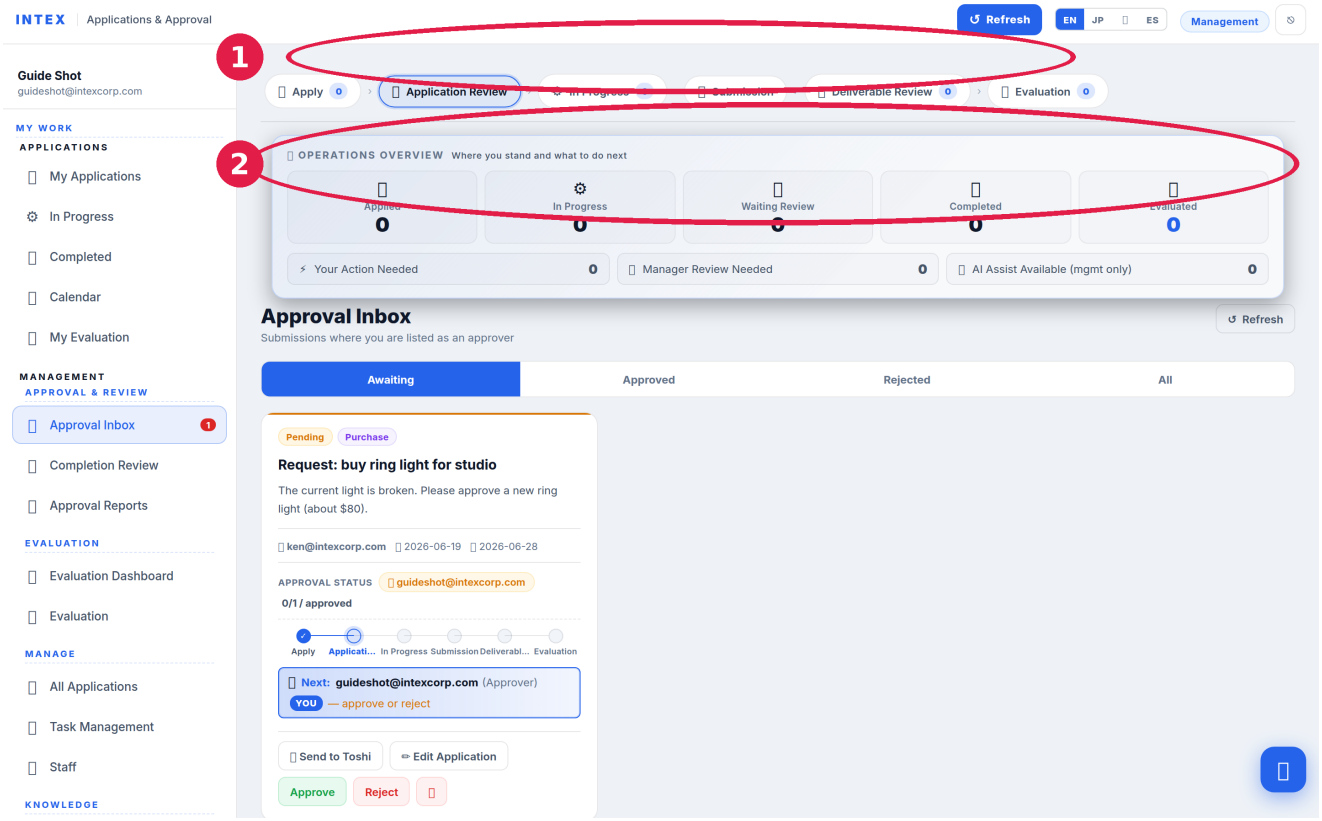
Tip: If this is your first time, click **“Set up your password”** on the login page first.

1.2 Read the Tasks page

After you log in, open **Task System**. The top of the page shows your work at a glance.

1 The **number cards** show how many items are Applied, In Progress, Waiting Review, Completed, and Evaluated.

2 The **flow line** shows the steps of work: Apply → Application Review → In Progress → Submission → Deliverable Review → Evaluation.



1 Number cards · 2 Work flow steps

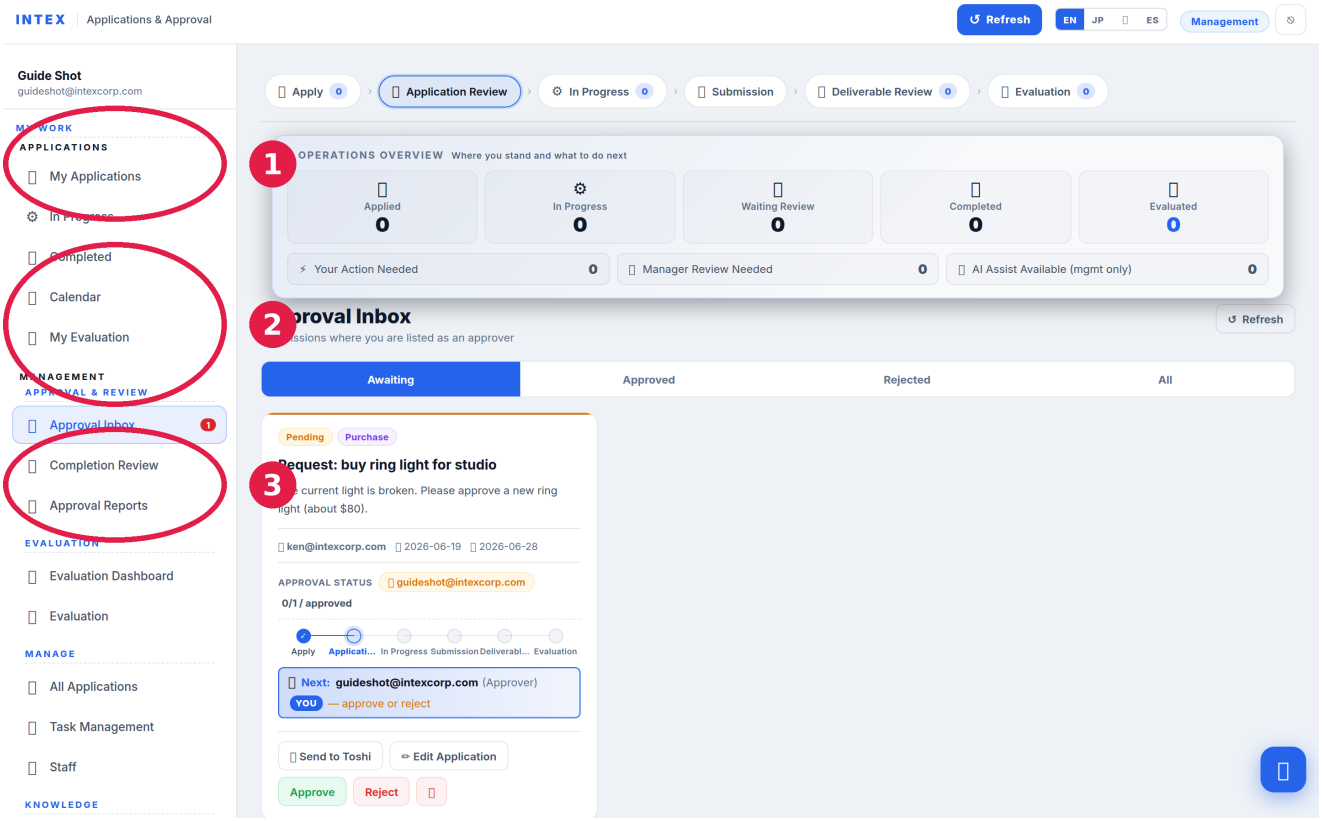
1.3 Understand the left menu

The menu on the left is split into groups. As a manager you mostly use the **Management** and **Evaluation** groups.

1 **My Work** — your own applications and tasks.

2 **Management** — Approval Inbox, Completion Review, and Approval Reports. This is where you approve work.

3 **Evaluation** — give a score to finished tasks.

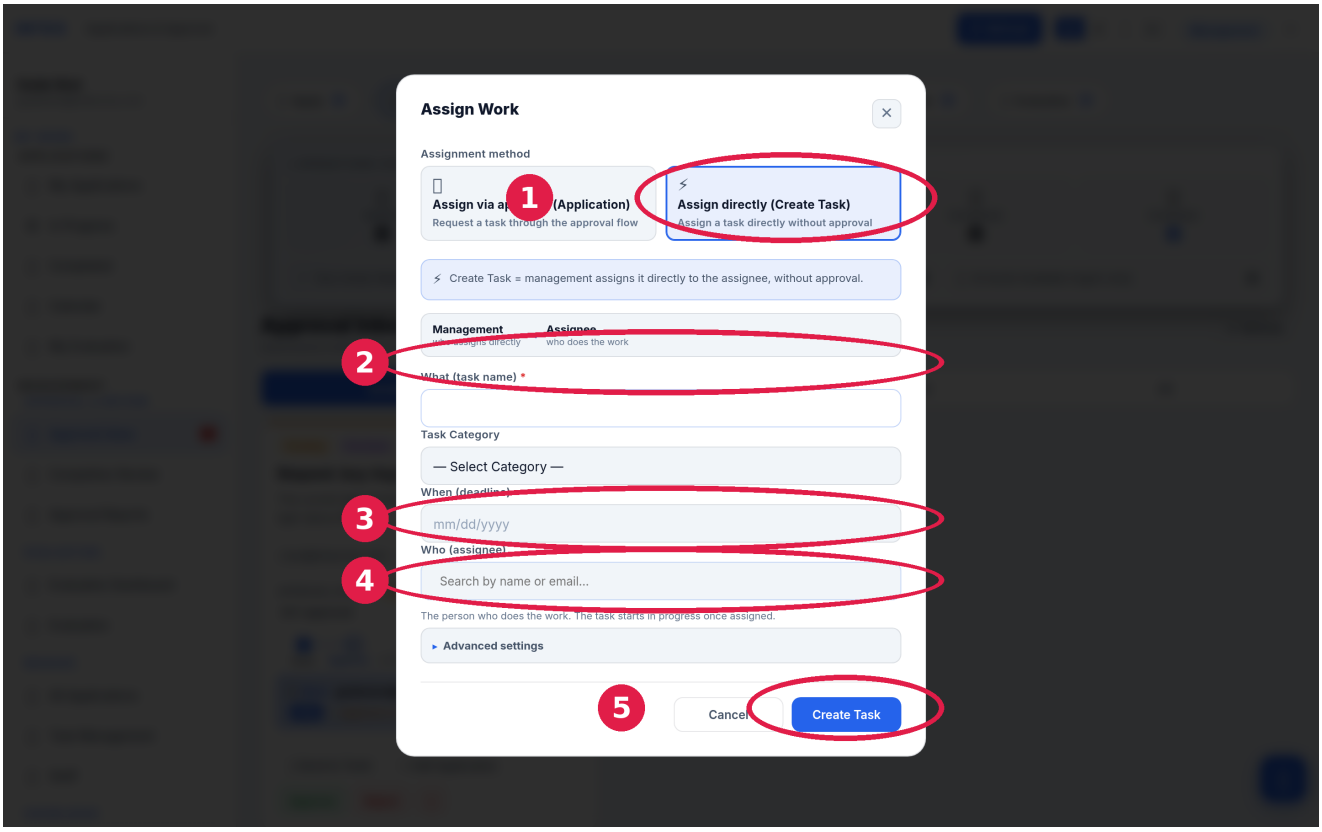


1 My Work · 2 Management · 3 Evaluation

1.4 Give a task to a team member

You can give a task directly to a person. Open **Task Management** and click **“+ Assign Work”**. A box will open.

1. Choose **“Assign directly (Create Task)”**. This sends the task without an approval step.
2. Type the **task name** in the “What” box.
3. Pick a **deadline** (the day it is due).
4. Choose the **person** who will do the work in the “Who” box.
5. Click the blue **Create Task** button.



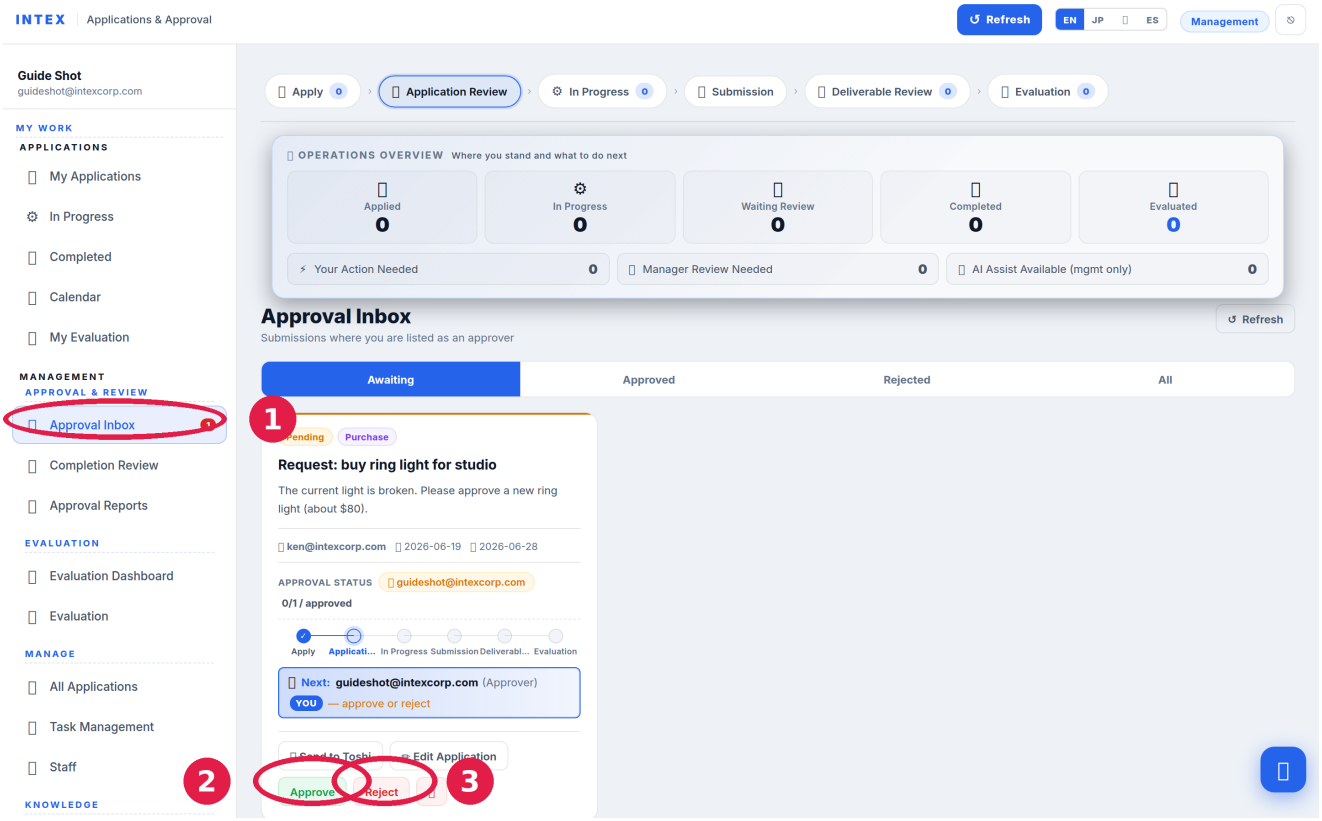
1 Assign directly · 2 Task name · 3 Deadline · 4 Person · 5 Create Task

The task starts as **In Progress** right away after you assign it.

1.5 Approve or reject a request

When a team member sends a request, it waits for you in the **Approval Inbox**.

1. Click **Approval Inbox** in the left menu. A red number shows how many are waiting.
2. Read the request. Click the green **Approve** button to say yes.
3. Click the red **Reject** button to say no.



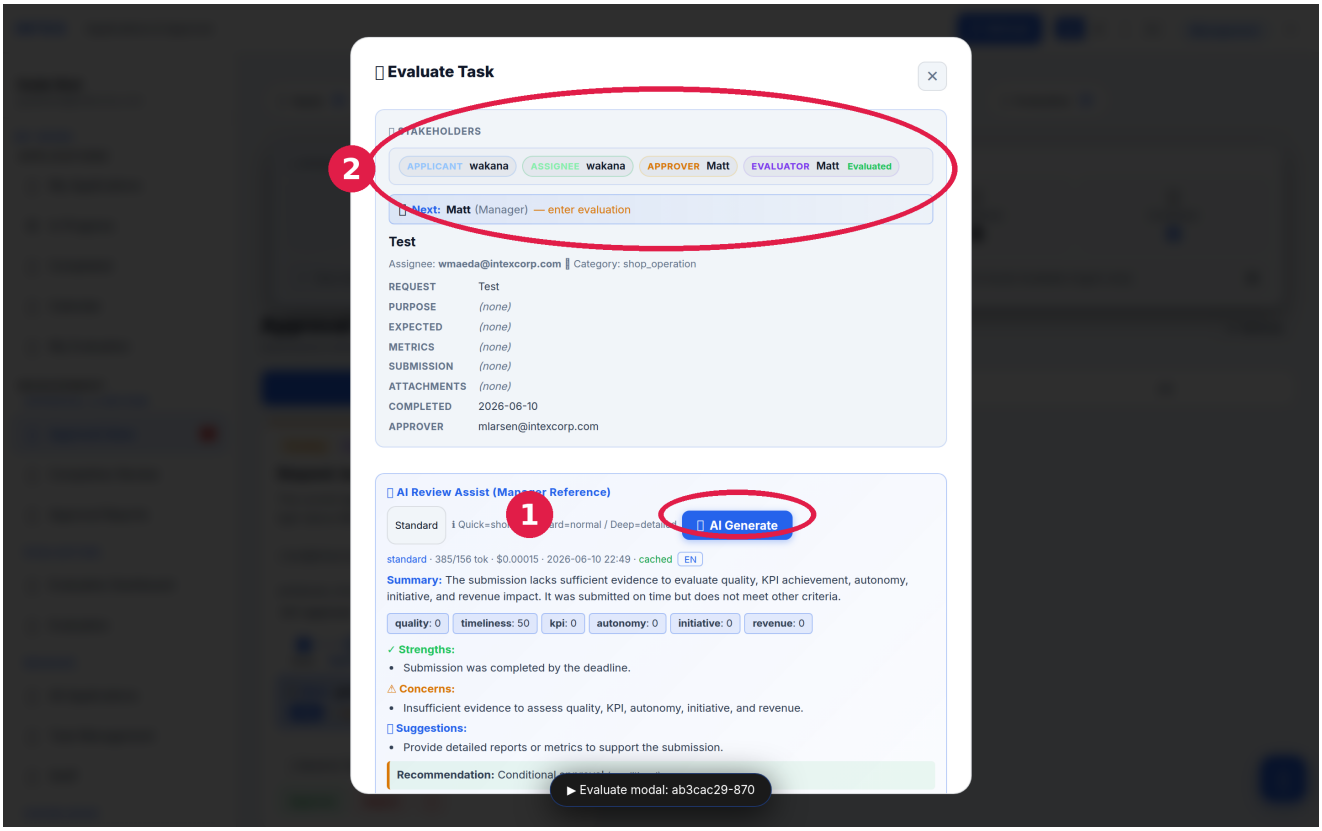
1 Approval Inbox · 2 Approve · 3 Reject

Note: Use the **Awaiting** tab to see new requests. You can see past decisions in the **Approved** and **Rejected** tabs.

1.6 Evaluate finished work

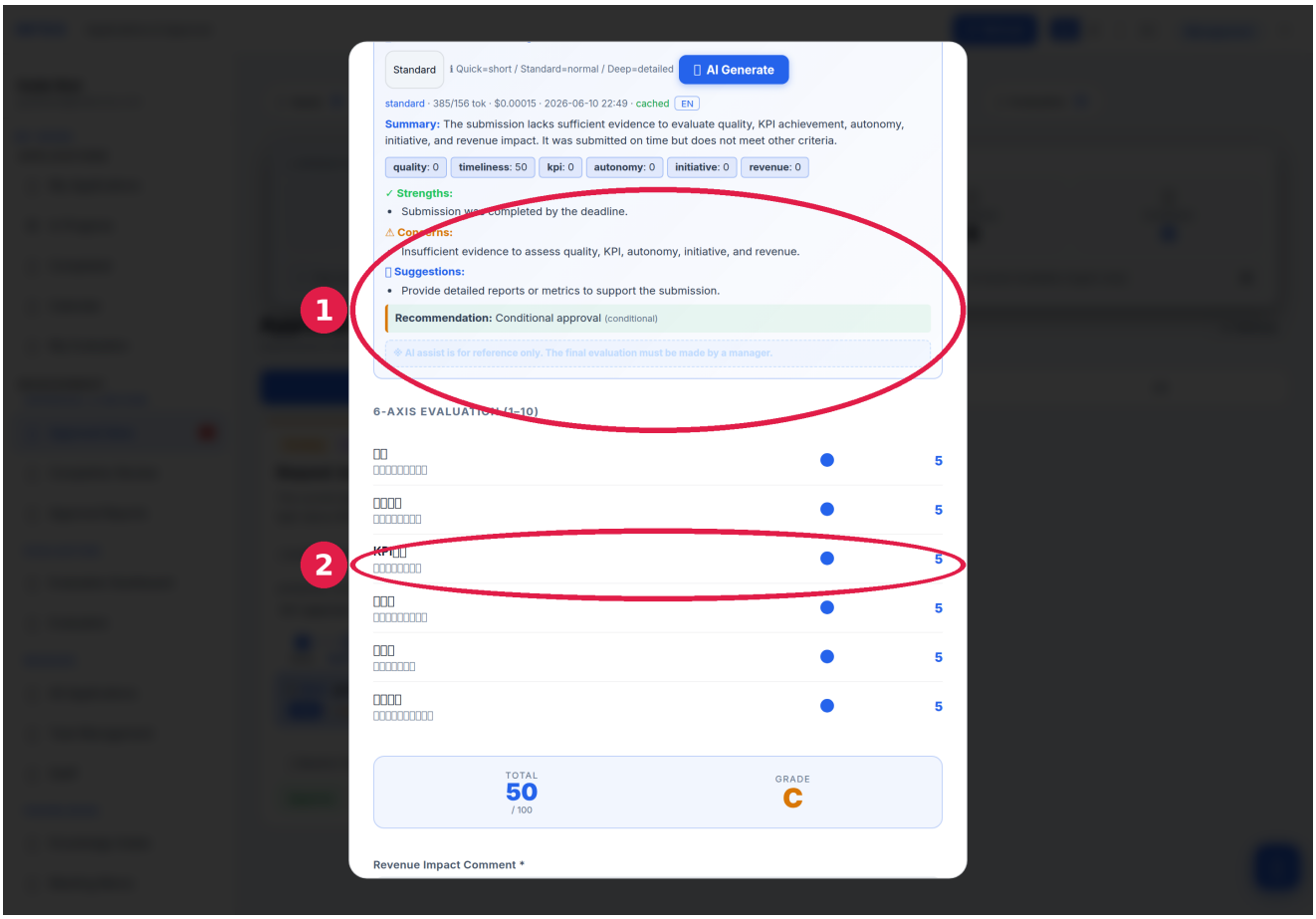
When work is finished, you can give it a score. Open the task and click **Evaluate**. A box opens with an AI helper and 6 sliders.

1. You may click **AI Generate** to get a draft summary. **This is only a helper.**
2. Read the work details (Request, Purpose, Submission) at the top.



1 AI Generate (helper) · 2 Work details

3. Move the **6 sliders** (1–10) for Quality, Timeliness, KPI, Autonomy, Initiative, and Revenue impact.
4. The **Total score** and the **Grade** (A, B, C…) update by themselves. Then save your evaluation.



1 The 6 sliders · 2 Total score and Grade

Important: The AI text is only a reference. The final score must be decided by you, the manager.

Part 2

The Finance page

2.1 Open the Finance page

From the home page, click **Finance** in the menu. The Finance page shows money numbers for the TikTok Shop.

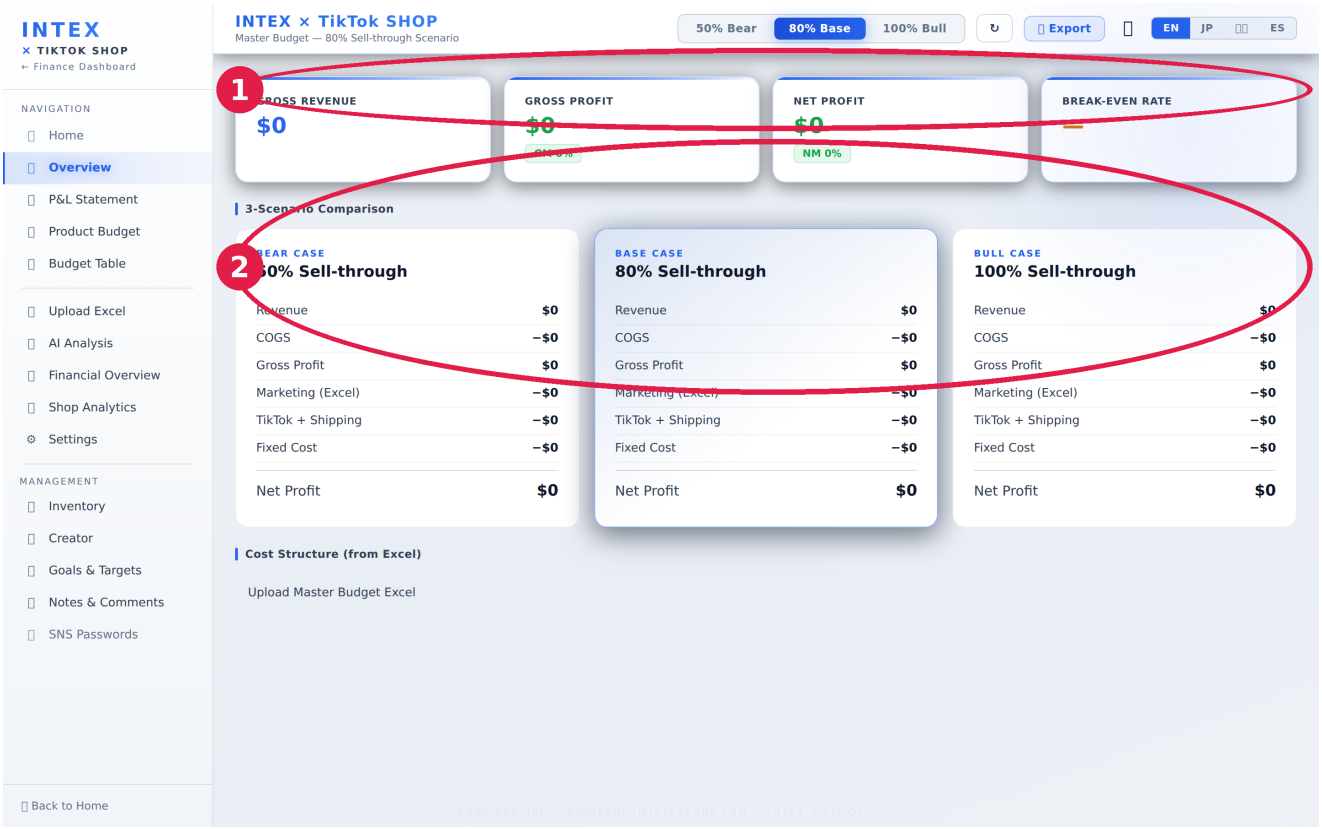
If you do not see Finance in the menu, your role may not have finance access. Ask your admin.

2.2 Read the top numbers (KPI)

The **Overview** screen shows the most important numbers at the top.

1 The **4 cards** show: Gross Revenue, Gross Profit, Net Profit, and Break-even Rate.

2 Below them, the **3 cases** (Bear, Base, Bull) compare three sales results side by side.



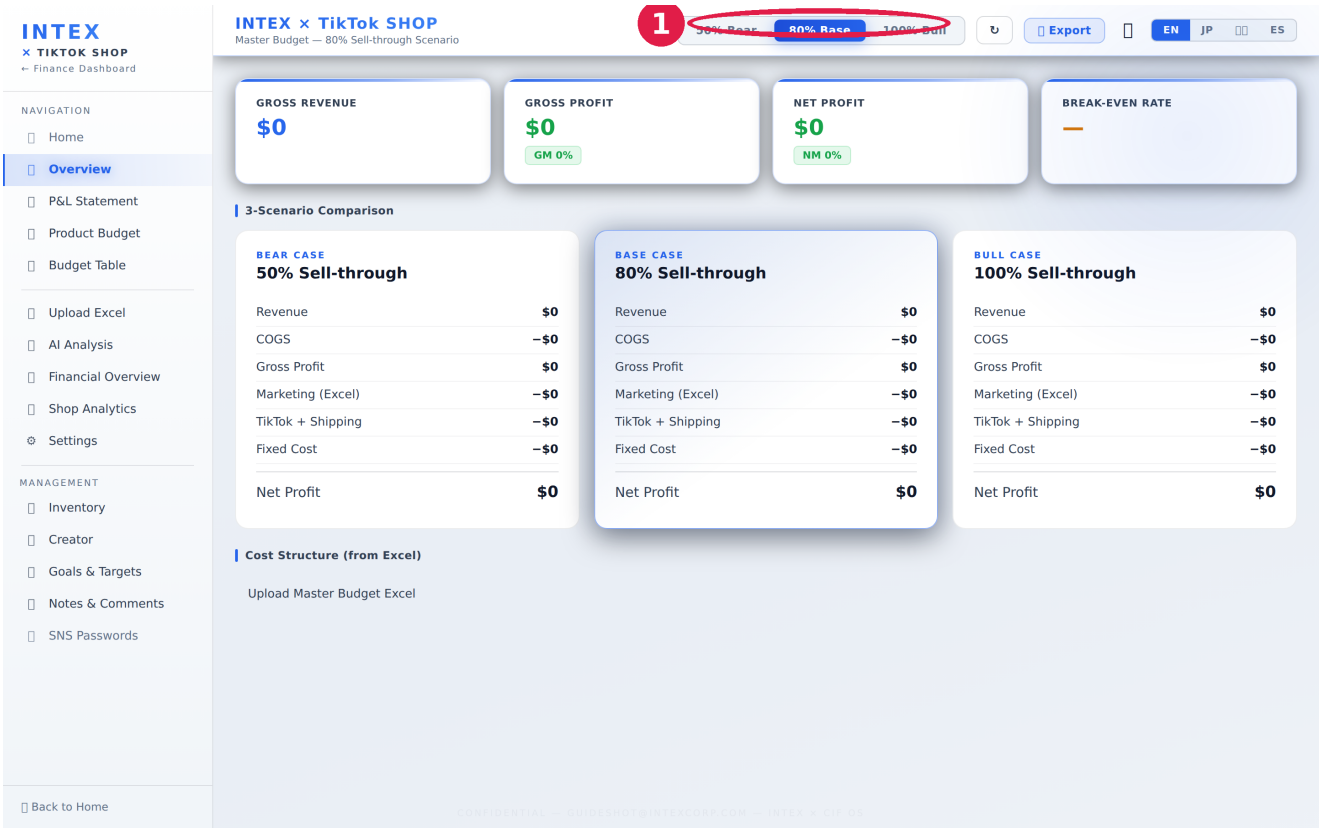
1 The 4 number cards · 2 The 3 case comparison

Note: If the numbers show **$0**, the budget file is not uploaded yet. See step 2.5.

2.3 Change the scenario

At the top right you can switch the sales scenario. The whole page updates to match.

1 Click **50% Bear** (low), **80% Base** (normal), or **100% Bull** (high) to see each result.



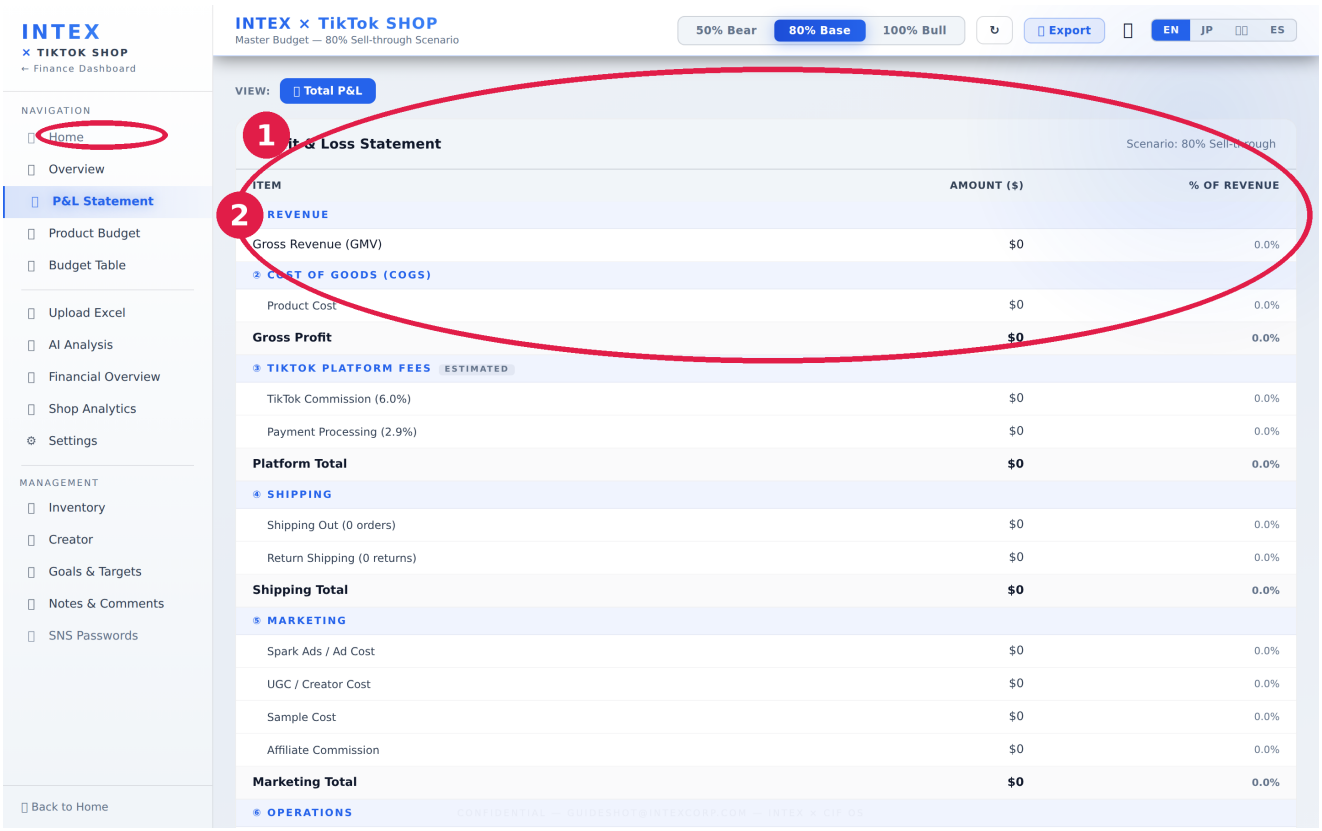
1 Bear / Base / Bull buttons

2.4 Read the P&L Statement

The **P&L Statement** shows where the money comes in and goes out, line by line.

1 Click **P&L Statement** in the left menu.

2 Read each row: Revenue, Cost of Goods, Gross Profit, Platform Fees, Shipping, Marketing, and more. The right column shows the % of revenue.



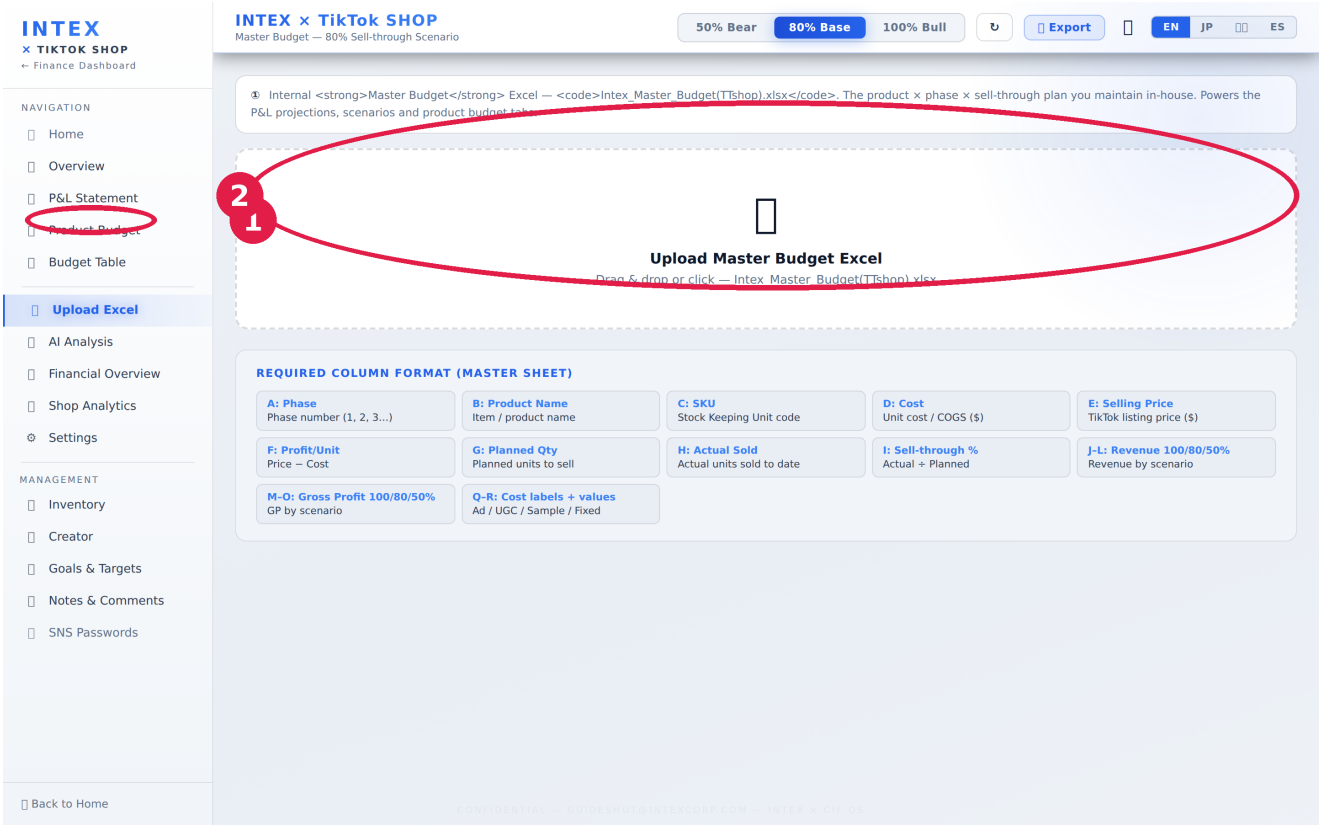
1 P&L; Statement menu · 2 The line-by-line table

2.5 Upload the Master Budget Excel

The numbers come from one Excel file. Upload it to fill the page with real data.

1 Click **Upload Excel** in the left menu.

2 Drag your Excel file into the box, or click the box to choose the file.



1 Upload Excel menu · 2 Drag-and-drop box

Note: The file must follow the column format shown under the box (Phase, Product Name, SKU, Cost, and so on).

2.6 Run AI Analysis

After the Excel is uploaded, you can ask the AI to review your finance plan.

1 Click **AI Analysis** in the left menu.

2 Click the blue run button to start the analysis.



1 AI Analysis menu · 2 Run button