Sales

Version 7.4

USER OPERATION MANUAL

CLIENT: Ebizframe Neo

PREFACE

Welcome To *ebizframe* Sales

Congratulations on your choice of *ebizframe* Sales for your organization. This package is a part of *ebizframe* from Eastern Software Systems. It is powerful and flexible software, designed to take care of operations of a Sales department in any organization.

Who Should Use This Manual?

This document is intended for anyone with some knowledge of the operations of Sales department. It is assumed that you are familiar with Microsoft Windows interface and using toolbars, menus, dialog boxes, and operating a mouse.

How To Use This Manual?

This manual is designed to help you quickly learn to use *ebizframe* Sales. Use this manual as a reference guide to acquaint yourself with the features of *ebizframe* Sales. In case you need any assistance while working with any option, look up the particular topic in the table of contents and refer to the specified page number in the manual. The manual explains each option in detail and also gives important notes on each option.

How This Manual Is Organized?

This manual has been divided into chapters to facilitate easy access to specific topics. The chapter-wise distribution is as follows:

Chapter 1: Getting Started
Chapter 2: Overview of *ebizframe* Sales
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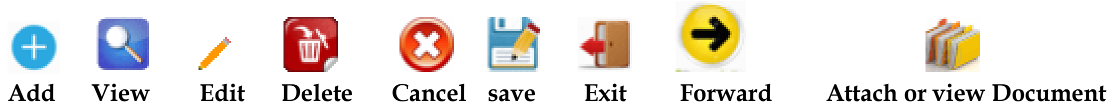
1. GETTING STARTED

1.1. TOOLBAR AND HELPTIPS

The Toolbar on all *ebizframe* screens contains buttons that give you quick access to common commands. To choose a command, simply click the appropriate button. Following are the buttons included in the toolbar:



In addition, *ebizframe* Sales displays short messages called Help Tips at the bottom of your screen to assist you while entering data.

Note:

Help  button is provided, to assist the user with the purpose and procedure of the following options in *ebizframe* Sales:

Order

Invoice

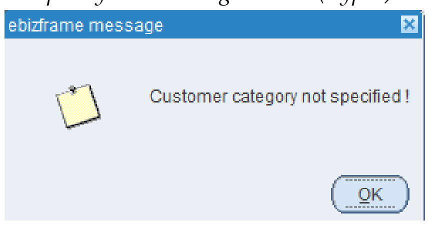
1.1.1. SYSTEM MESSAGES

ebizframe displays a message box when it wants you to respond to something (usually an error message), or to confirm an action. Message boxes are of many types. In *ebizframe* Sales, two kinds of message boxes commonly used are:

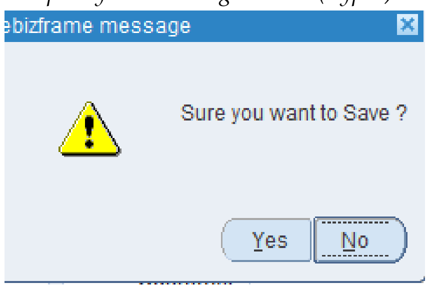
When you are required to acknowledge a communication from the system (usually an error message), the message box has only an OK button in it.

When you are required to confirm an action, the message box has YES and NO buttons in it.

Sample System Message Screen (Type1)



Sample System Message Screen (Type2)



1.2. SELECTING DATA FROM A LIST

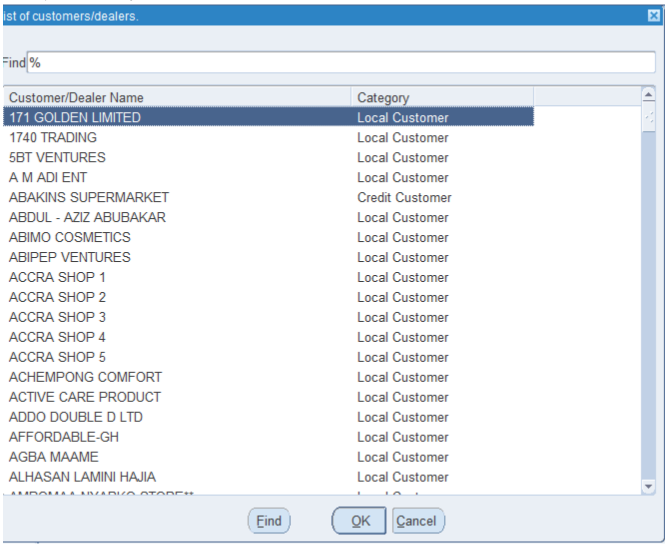
1.2.1. LIST OF VALUES

List Of Values (LOV) is a window from which you can view and select valid values for a text item. You can filter the data using the 'Find' field of LOV. By default, LOV displays all the data.

Different criteria for filtering data are:

- Searching for a string starting with a particular character: Enter the search criteria followed by % in the 'Find' field and click on Find button. For example, if you want to display only those Invoice Numbers that start with 'INV/L', enter 'INV/L%' in the 'Find' field and click on Find button.
- Searching for a string containing a particular embedded character: Enter % followed by the embedded character in the 'Find' field and click on Find button. For example, if you want to display all Invoice Numbers with 'I' somewhere in the string, enter '%I and click on Find button.
- Searching for a combination of characters in the various columns of the LOV: Enter % followed by the combination of characters in the 'Find' field and click on Find button. For example, if you want to display a combination of Invoice Number starting with 'I' and Received Date starting with '01', enter '%I01' in the 'Find' field and click on Find button

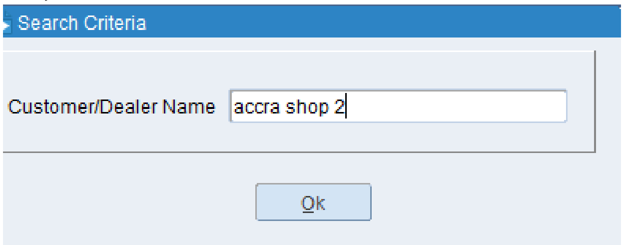
Sample List of Values Screen



1.2.2. SEARCH STRING

You can further reduce your search time using search strings. These are available on specific toolbar icons and list of values. On clicking the toolbar icon or list of values, a new screen is displayed. Enter the required search string on specific field. Click on OK button. All values matching the search string are displayed. If no value is entered, all values are displayed.

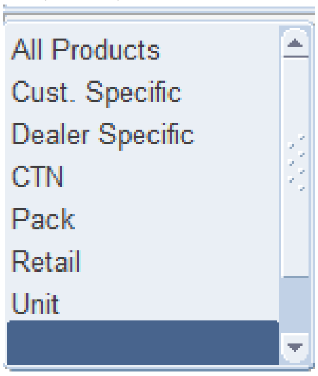
Sample Search Screen



1.2.3. DROPDOWN LIST

Click a text box with an arrow pointing downwards to display pre-defined values for that particular field. You can select the data from the values in the list.

Sample Dropdown Screen

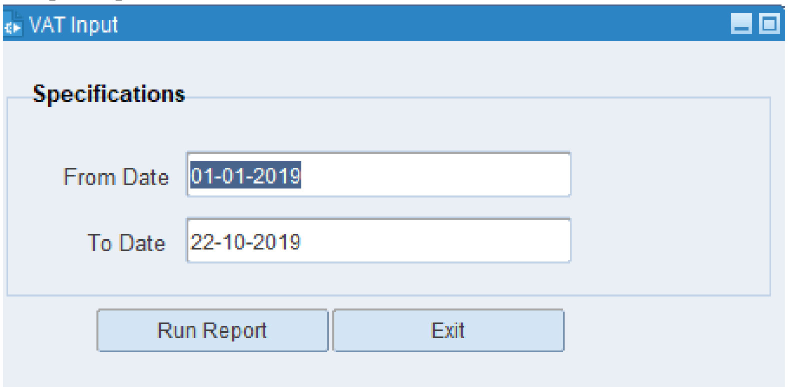


1.3. REPORT WINDOW

Before any report generation takes place, a report window is displayed. This window contains fields like:

Specifications	You may be required to enter certain data/specifications, which can vary for different reports.
Run Report	Click on this button to process the report.

Sample Report Window



Note:
You can generate reports in Landscape or Portrait formats. Reports where the type of format is displayed along with the report heading can be generated in the specified format only.

2. OVERVIEW OF *ebizframe* SALES

ebizframe Sales streamlines sales operations by handling pre-sales, domestic as well as export sales.
Pre-sales activities involve maintaining prospect details, region-wise competitor details and business partner/sales executive targets. Scheduling of daily activities of sales executive and expense claim of sales executives can also be done.
ebizframe Sales records details of market surveys carried out by marketing executives. *ebizframe* Sales maintains information about domestic and overseas customers and dealers, and their various dispatch locations. There is provision for maintaining multiple item rates applicable for different periods for each customer or dealer.
Sales department receives purchase enquiries from several potential customers and dealers for company's products/items. On receiving an Enquiry, a Quotation is generated which specifies the prices and terms and conditions for sale. In case product samples are sent to customers or dealers, *ebizframe* Sales maintains details of the same.
On receiving Purchase Order from a customer or dealer, *ebizframe* Sales generates a Sales Order for the ordered items. *ebizframe* Sales also maintains a record of lost jobs; i.e., the quotations that did not result in sales orders. An order may be Direct, Scheduled, Open, Against D3 (order against Sales Return) or Sample.
ebizframe Sales Menu
ebizframe Sales consists of the following menu options:

- Sales
- Invoice Tracking
- Listings
- Definitions
- Exit

Sales option takes care of all activities related to sales. Following are some of the sub-heads for these activities: Enquiry, Quotation, Order, Close Order.

Listings option allows you to generate various reports for the Master data defined in Definitions.

In **Definitions** option, all the Master data used in *ebizframe* Sales is defined. You can add, modify or view the details of Customers/Dealers, Products prices etc.

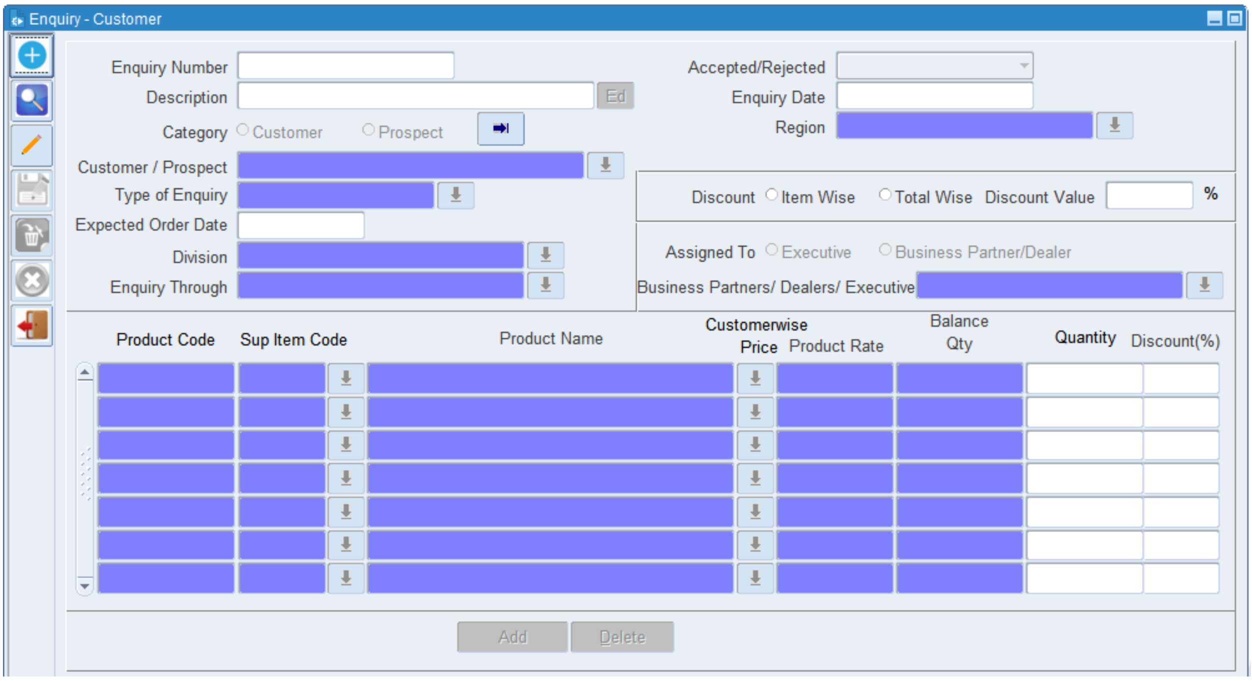
Choosing **Exit** takes you out of *ebizframe* Sales.

3. SALES

3.1. ENQUIRY

Purpose:
Sales department receives enquiries from several potential or existing customers for company's products. This option records details of these enquiries. Enquiries are categorized as from prospects or existing customers. Against these enquiries quotations are sent for supply of products. This option also allows you to record the executive/business partner/dealer who will handle the enquiry. Competitors for the enquired product can also be recorded.

Sample Enquiry Screen



Procedure:

To Record Details of Customer/Prospect Enquiry
Click Add on the toolbar. Enquiry is Accepted by default. You may include a short Description of the enquiry. Enter the Enquiry Date (by default current date is displayed). Specify Category of customer as 'Customer' or 'Prospect' by clicking on appropriate radio button. Click on LOV button of Customer Name. A new screen is displayed. Enter the search string for Customer Name. Click on OK button. Select Customer Name from list of values. Select customer Region from list of values. Specify Type of Enquiry and the Enquiry Through (whether enquiry was made through telephone, letter, etc.) from respective list of values. Enter Expected Order Date. Select Assigned To as 'Executive' or 'Business Partner/Dealer' by clicking on appropriate radio button. Select Business Partner/Dealer/Executive who will handle the enquiry, from list of values.

For entering details of the item(s) for which the customer has sent in enquiry, select Item Type (Finished Goods/Others) from the dropdown list. Select Item Code for which enquiry has been received from list of values. Item Name gets displayed. Enter Quantity. Quantity, Rate Per Unit and Discount (in percentage) are displayed. Change Quantity, Rate Per Unit and Discount (in percentage) if required. Enter Remarks.
To add next item, click on Next button. To delete an item, select the particular row and click on Delete button.

Click on OK button to return to the previous screen. Click Save on the toolbar to save. Enquiry Number is generated.

To Edit Details of Customer/Prospect Enquiry
Click Edit on the toolbar. A new screen is displayed. Enter search string for Enquiry Number. Click on OK button. Select required Enquiry Number from the list of values; corresponding details are displayed. You can change the Accepted/Rejected, Description, Quantity, Category, Assigned To, Business Partner/Dealer/Executive Name, Expected Order Date, Region, competitor Quantity, Rate Per Unit, Discount (in percentage) and Remarks. Make the required changes and save. In case you want to delete the selected enquiry, click Delete on the toolbar.

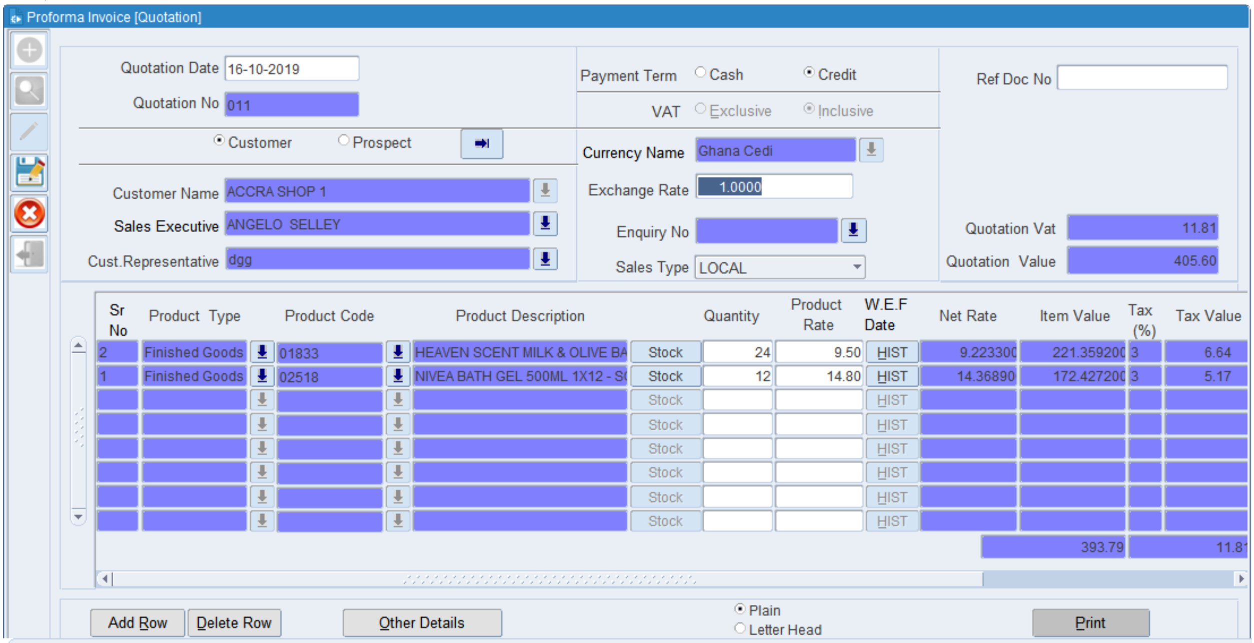
To View Details of Customer/Prospect Enquiry
Click View on the toolbar. A new screen is displayed. Enter search string for Enquiry Number. Click on OK button. Select the Enquiry Number from list of values; corresponding details are displayed.
Note:

- Enquiry Number is generated by the system when the enquiry is saved.
- Enquiry Date cannot be greater than system date.
- Enquiry Date, Customer Name, Item Code and Quantity must be entered before saving an enquiry.
- Once Quotation is generated against an enquiry, enquiry details cannot be edited or deleted.
- In case of a new customer, Customer Name can be edited.
- In case of a new item, Item Name can be edited.

3.2. QUOTATION

Purpose:
Sales department quotes the prices and terms and conditions of the supply of products to the customer/prospect. In this sub-option, details of the quotation to be sent to the customer/prospect are recorded in this option. Quotation is categorized as from prospects or existing customers. This option also allows you to record the Business Partner/Dealer/Executive who will handle the quotation.

Sample Quotation Screen



Procedure:

To Generate A Quotation

Click Add on the toolbar. Enter the Quotation Date. A new quotation can be generated in two ways:

- From an Enquiry: Select enquiry Number from list of values. Corresponding details as given in the customer/prospect enquiry are displayed, viz., Enquiry Number, Enquiry Date, Customer Name, and item details. Select Region in which the sale would be done, by selecting from list of values. Enter Expected Order Date. Select Assigned To as 'Executive' or 'Business Partner/Dealer' by clicking on appropriate radio button. Select Executive/ Business Partner/Dealer from list of values. You can change Quantity. Basic Item Rate is displayed. If you want to quote a different rate to the customer, select Rate w.e.f. from the list of values. Rate w.e.f is defined in Customer/Dealer Price Master under Definitions option. Enter the Quantity of item and approximate Delivery Days.
  To add next item, click on Next button. To delete an item record, select the particular row and click on Delete button.
- Without an Enquiry: Click on the LOV button of Customer Name. A new screen is displayed. Enter the search string for Customer Name. Click on OK button. Select Customer Name from list of values. Search string is also provided for Item Code. Specify Category of customer as 'Customer' or 'Prospect' by clicking on appropriate radio button. Specify the Quotation Type (New or Revised) by selecting from dropdown list. In case of a Revised quotation, click on LOV button of 'Old Quotation Number' and select the quotation that you want to change. Details of the old quotation will be displayed and you can make appropriate changes. Select Region in which the sale would be done, by selecting from list of values. Select Assigned To as 'Executive' or 'Business Partner/dealer' by clicking on appropriate radio button. Enter Expected Order Date. Select Executive/ Business Partner/dealer from list of values. Specify the Item Type (Finished Goods/Others) by selecting from dropdown list. Select required Item Code from the LOV; corresponding Item Name, basic Item Rate will be displayed. If you want to quote a different rate to the customer/prospect, select Rate w.e.f. from the list of

values. Rate w.e.f. is defined in Customer/Dealer Price Master under Definitions option. Enter the Quantity of item and approximate Delivery Period.

To add next item, click on Next button. To delete an item record, select the particular row and click on Delete button. Click Save on the toolbar to save. Quotation Number is generated.

To Edit A Quotation

Click Edit on the toolbar. From the displayed list of values, select the quotation that you want to change. Corresponding details are displayed. You can change the Description, Delivery Period, Quantity, Category, Terms and Conditions, Assigned To, Business Partner/Dealer/Executive Name, Expected Order Date, Region, competitor Quantity, Rate Per Unit, Discount (in percentage) and Remarks. Make the required changes and save. In case you want to delete the selected quotation, click Delete on the toolbar.

To View Quotation Details

Click View on the toolbar. A new screen is displayed. Enter search string for Quotation Number. Click on OK button. Select the Quotation Number from list of values; corresponding details are displayed. In case you want to print the selected quotation, click Print Quotation button on the screen. A report window will be displayed. Specify the destination of the generated quotation (Screen, Printer or File) and click on Print.

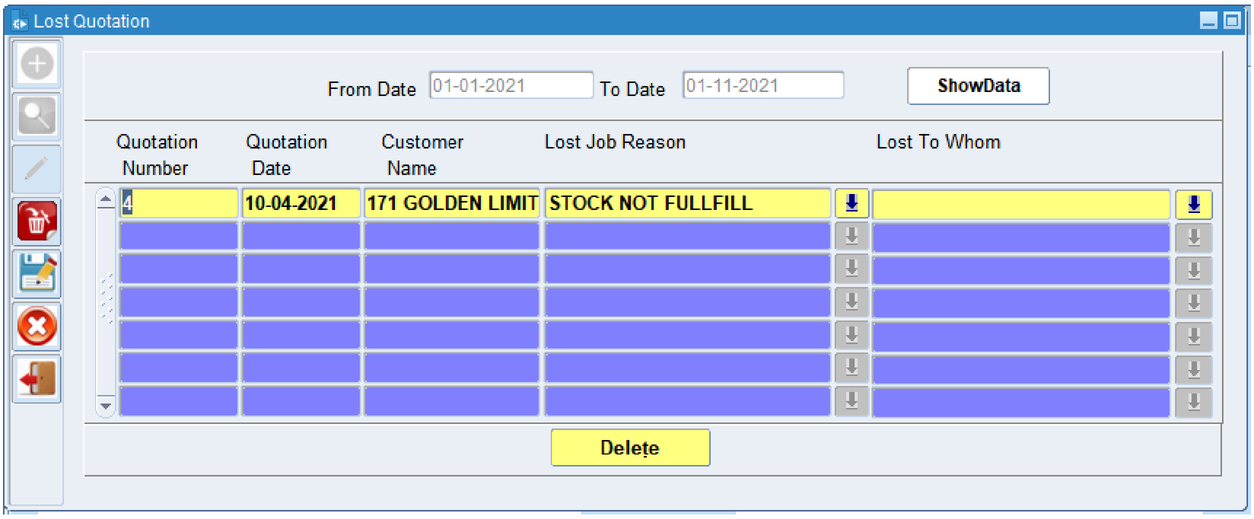
Note:

- Quotation Number for a valid record is system-generated once you save.
- Quotation Date cannot be greater than the system date.
- Quotation Date cannot be less than the Enquiry Date.
- New terms and conditions can be added in Other Parameters under Definitions option.
- Quotation cannot be edited or deleted if it is referenced in Order option.
- In case of a new customer, Customer Name can be edited.
- In case of a new item, Item Name and Rate can be edited.

3.3. LOST QUOTATION

Purpose:
This option maintains details of lost jobs; i.e., those quotations that are not converted into orders within the specified period.

Sample Lost Jobs Screen



Procedure:
To Add Lost Quotation Details
Click Add on the toolbar. Specify the time period for which lost jobs have to be recorded i.e., 'From Date' and 'To Date'. Quotation Number, Quotation Date and Customer Name for all quotations prepared during the specified time period that have not been converted into orders are displayed. Select Lost Job Reason and Lost To Whom (i.e. competitor name) from the respective list of values. Select a particular row and click on Delete button if any listed quotation is not to be included in the lost jobs. Click Save on the toolbar to save.

To Edit Details of Lost Quotation
Click Edit on the toolbar. From the displayed LOV, select the time period for which details of lost jobs are required. Details of all lost jobs for the specified time period are displayed. You can change only the Lost Job Reason and Lost To Whom. Make the required changes and save. In case you want to delete the selected record, click Delete on the toolbar.

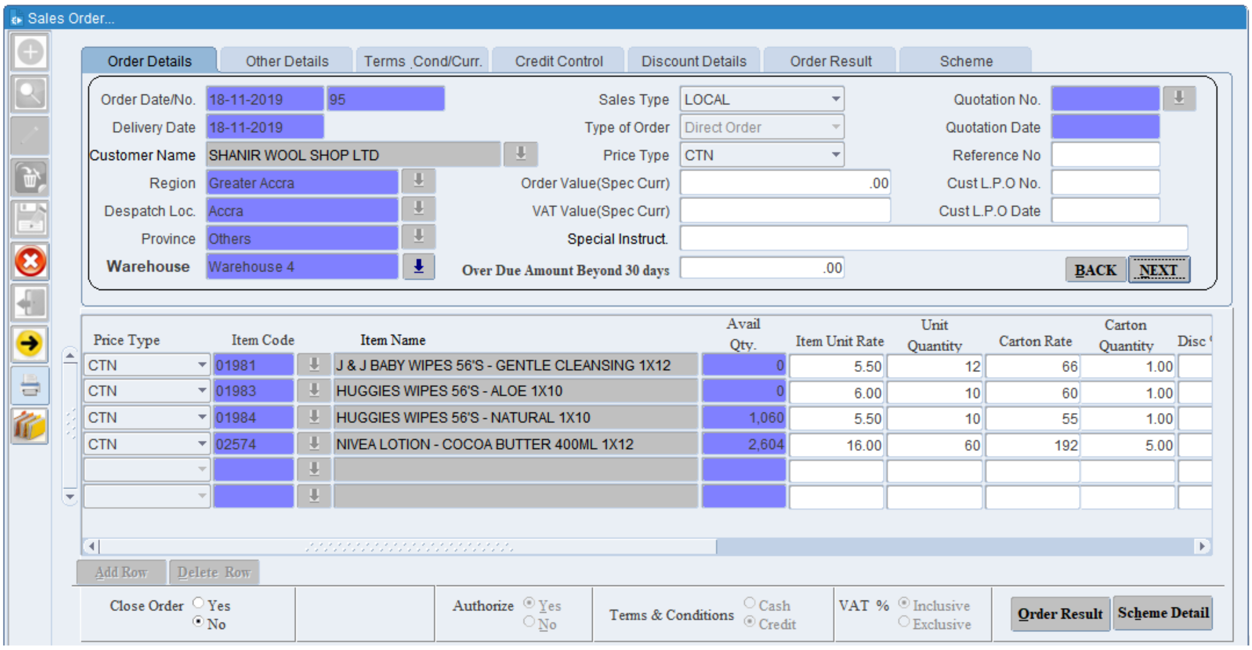
Note:
'To Date' cannot be less than 'From Date'.
'To Date' cannot be greater than system date.
Lost Job Reason can only be selected from the dropdown list. Any new reasons can only be added in the Other Parameters under Definitions option.

3.4. ORDER

Purpose:

On receiving order from customer, Sales department generates Sales Order for the ordered products. This option maintains details of the Sales Order. This option also allows you to record the executive/business partner who will handle the order. Competitors for the ordered product can also be recorded. At the time of order value calculation, excise details defined for the product in *ebizframe* Inventory, associated with products in *ebizframe* Sales is taken into consideration.

Sample Order Screen (First Part)



Procedure:

To Add A New Sales Order

Click Add on the toolbar. Enter the Order Date (by default current date is displayed). Select the Type of Order (Direct/Scheduled/Open/Against D3/Sample) from dropdown list. In case of Direct Order, Against D3 and Sample, enter the Delivery Date. In case of order Against D3, select Rejection Number from the LOV. Rejection Date gets displayed.

A new Sales Order can be generated in two ways:

- **From a Quotation**: Click on the LOV button of Quotation Number. Select Quotation Number from the displayed LOV. Corresponding details, viz., Quotation Date, Customer Name and Item Details are displayed. Select EI Billing from dropdown list. Enter the Customer Order Number and Customer Order Date. Select Region in which sale will be done from list of values. Select the Dispatch Location to which the order is being dispatched from list of values. State of dispatch location is displayed. Order Value is calculated, taking into consideration excise, tax and freight.
- **Without a Quotation**: Click on the LOV button of Customer Name. A new screen is displayed. Enter the search string for Customer Name. Click on OK button. Select Customer Name from list of values. Select EI Billing from dropdown list. Enter the Customer Order Number and Customer Order Date. Select Region in which sale will be done from list of values. Select the Dispatch Location to which the order is being dispatched from list of values. State of dispatch location is displayed. Search string is also provided for Item Code. Order Value is calculated, taking into consideration excise, tax and freight.

Select Authorize as 'Yes' or 'No' by clicking on the appropriate radio button. In case you select 'Yes', enter name of Authorized User and the valid Password (as defined in *ebizframe* System Administration). Click on OK button. Only authorized orders are processed further.

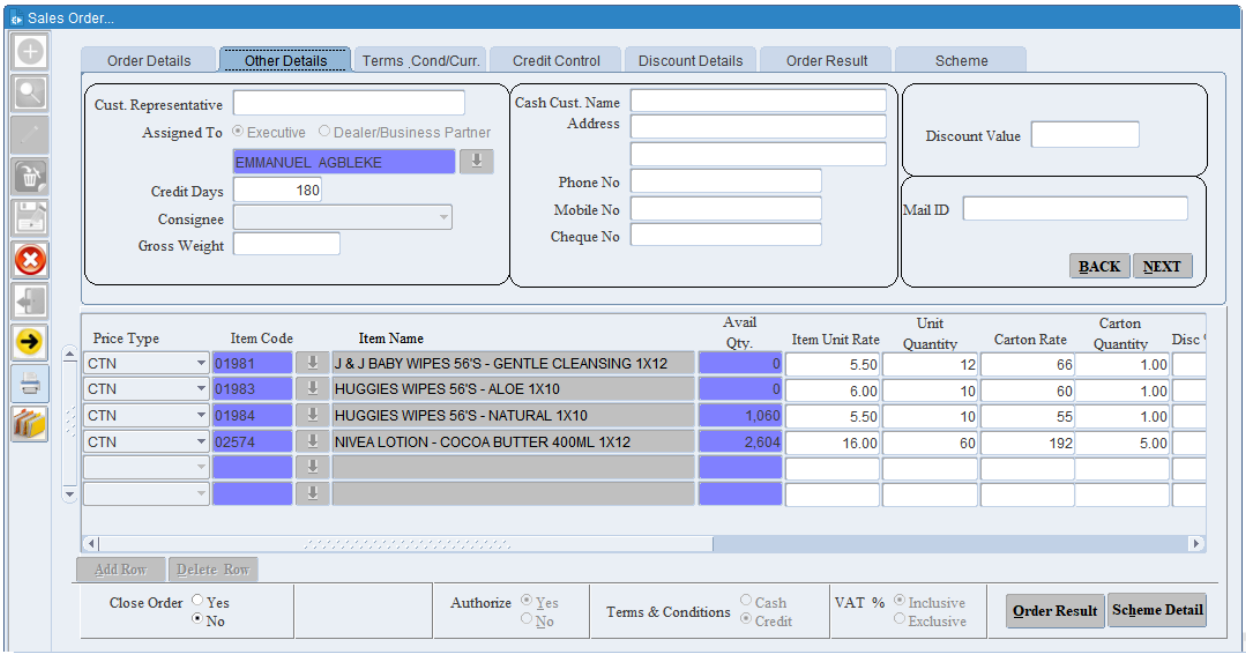
Following tabs are provided for additional information:

Item Details

Specify the items that are to be included in the Order by selecting the Item Type (Finished Goods/Others) and All/Specific Products from respective dropdown list and Item Code from list of values. MRP (Maximum Retail Price), MRP%, Item Name, and Net Rate are displayed. If you want to specify an Item Rate other than the standard rate, click on 'Rate w.e.f.'. Enter the Quantity Ordered. Item Value is calculated on the basis of Item Rate and Quantity Ordered and is displayed. Enter Quantity of item, Rate Per Unit, Discount on the item (in percentage) and Remarks.

Other Details

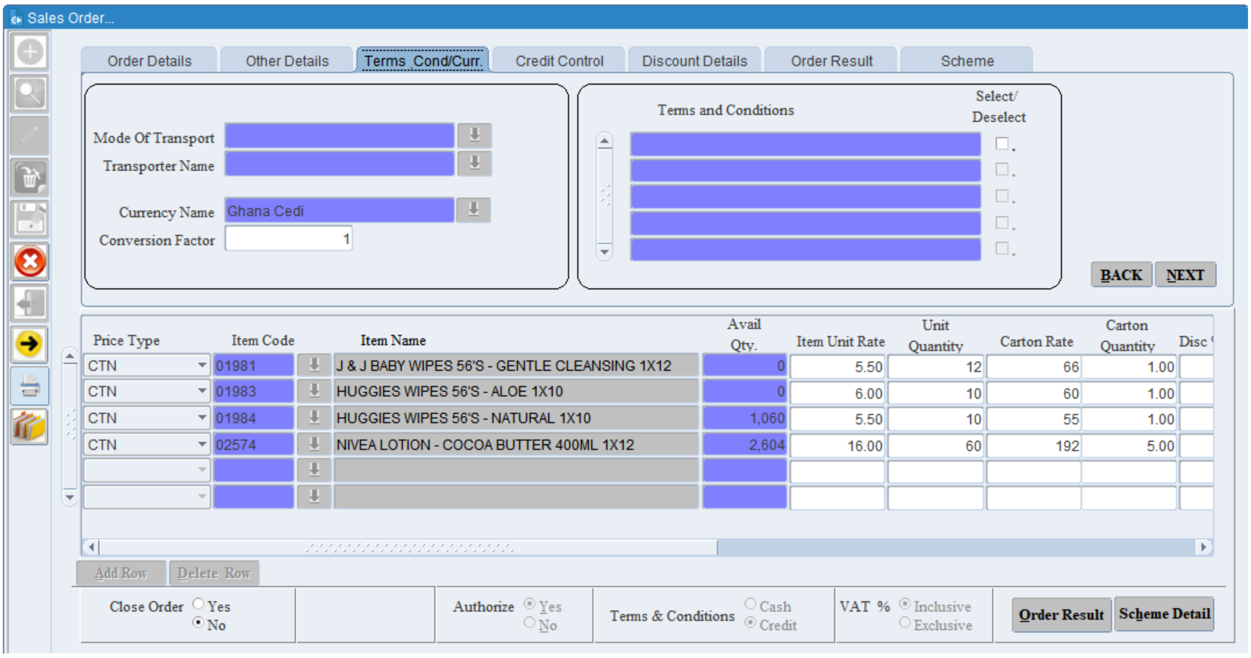
Select Mode of Transport, Transporter Name and Sales Executive from respective list of values. Specify whether payment will be through Credit or Cash. In case 'Credit' is selected, enter Credit Days. Select Consignee (Bank/Direct) and Freight (To Bill/To Pay) from respective dropdown lists. Enter Freight Value. Specify Assigned To as 'Business Partner/Dealer' or Executive by clicking on appropriate radio button. Enter Business Partner/Dealer/Executive Name who will be handling the order. Specify whether Discount is 'Item Wise' or 'Total Wise' by clicking on appropriate radio button. Enter Discount Value (in percentage).



Terms and Conditions

Specify the applicable Terms and Conditions by marking ☑ on the appropriate checkbox.

Click Save on the toolbar to save. Order Number is generated.



To Edit Order Details

Click Edit on the toolbar. A new screen is displayed. Enter search string for Order Number. Click on OK button. Select the Order Number from list of values; corresponding details are displayed. Mark ☑ on Close checkbox to close order against the product.

To Cancel Order Details

Click Save on the toolbar. From the displayed LOV, select the Order Number to be cancelled. Selected Order is displayed. Click on the radio button 'Yes' against 'Cancel Order' to cancel the Sales Order.

To View Order Details

Click View on the toolbar. A new screen is displayed. Enter search string for Order Number. Click on OK button. Select the Order Number from list of values; corresponding details are displayed.

To Forward Purchase Order

Click forward on the toolbar. A new screen is displayed. Select the Workflow Status from list of value and then Forward to User name then enter Remarks. Click on save button to Saved.

To Attach or View Document.

Click Attach or View Document on the toolbar. A new screen is displayed. Select Document type then Select Document Reference number and enter other all other details and click on save button.

Note:

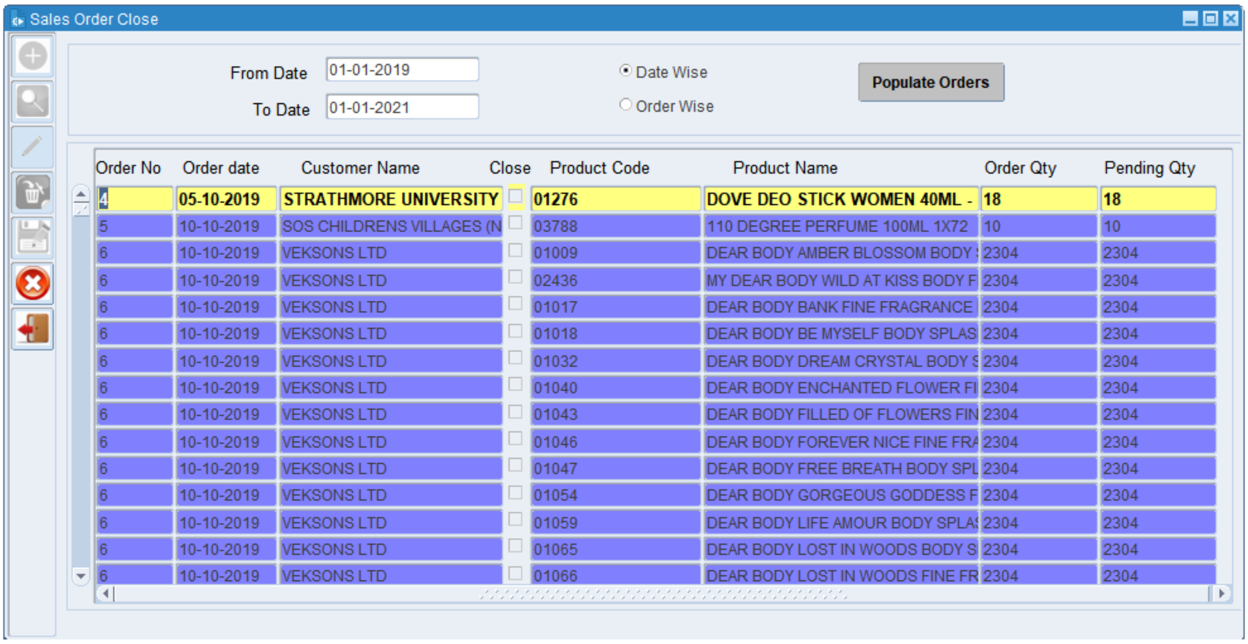
- Order Number is generated by the system once the new record is saved.
- In case of an Open Order, Quantity Ordered should be zero.
- Delivery Date cannot be less than Order Date.
- Discount can be either Item-wise or Total-wise.
- Terms and Conditions are defined in Other Parameters under Definitions option.
- In case of a new customer, Customer Name, Dispatch Location and Region have to be entered which can later be edited in Customer/Dealer Master under Definitions option.
- In case Item Type is Finished Goods, new Item Code, Item Name, Rate and Unit have to be entered.
- In Edit mode before saving, system prompts for authorization.
- All orders including the cancelled orders can be viewed.

3.5. CLOSE ORDER

Purpose:

On receiving order from customer, Sales department generates an Order for the specified product. Occasionally, a change to the order may be required mid way through its completion, for instance when the terms and conditions undergo a change after partial dispatches have been made. At such times *ebizframe* allows you to close the sales orders, and issue fresh one if required.

Sample Close Order Screen



Procedure:

To Add Close Order

Click Add on the toolbar. Specify the time period for Close Multiple Sales Orders i.e., ‘From Date’ and ‘To Date’. Select Customer Name from list of values. Click on Populate Orders button. Corresponding order details i.e.; Order Number, Order Date and Party Name are displayed. Click on Item Details button. Corresponding Item Code, Item Description, Quantity Ordered, Quantity Received, Unit Price and Amount are displayed. Click on OK button to return to previous screen. Mark Cancel checkbox ☑ to cancel the order. Click Save on the toolbar to save.

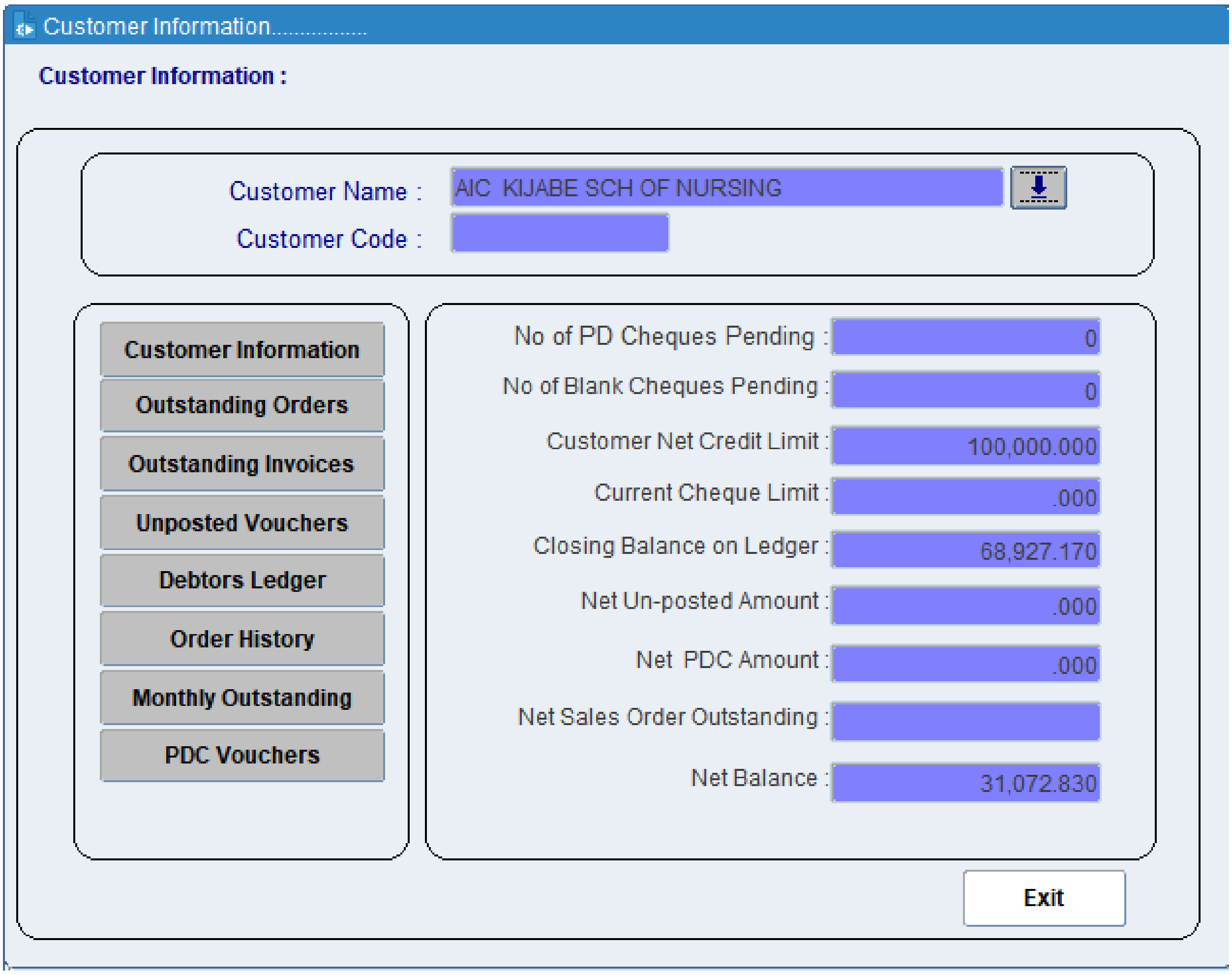
To View Close Order

Click View on the toolbar. Specify time period for Close Multiple Sales Orders i.e., ‘From Date’ and ‘To Date’. Select Customer Name from list of values. Click on Populate Orders button. Corresponding details are displayed. Click on Item Details button to view corresponding item details.

3.6 CUSTOMER INFORMATION

Purpose:
This option show customer information.

Sample Close Order Screen

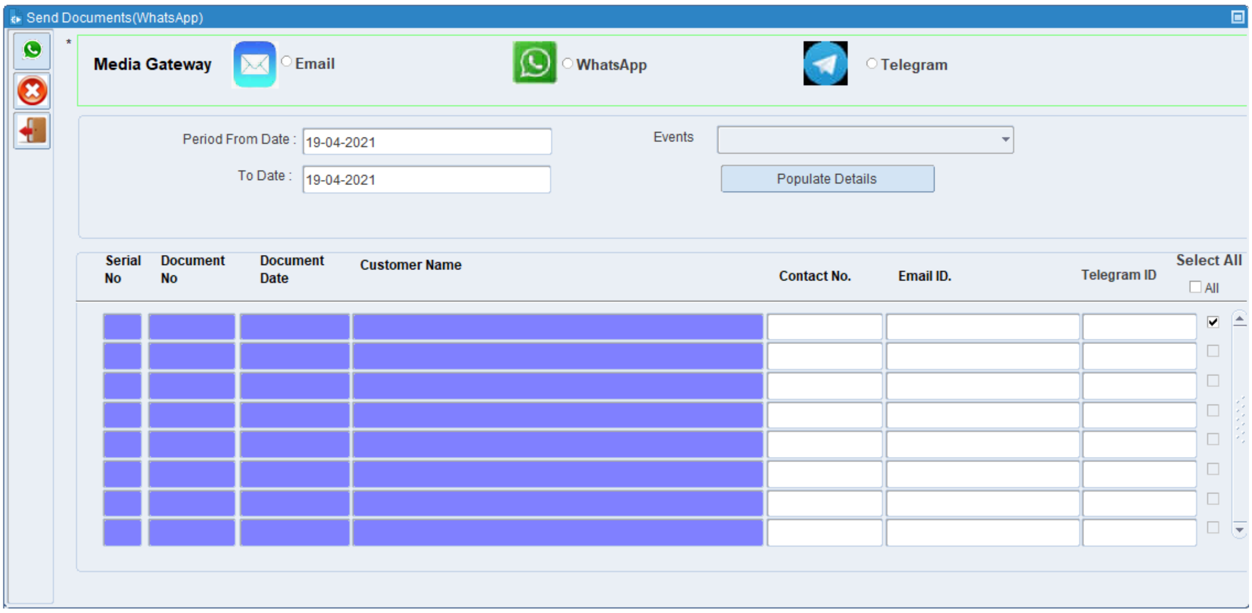


3.7 Send Document (WhatsApp)

Purpose:

The purpose of integrating send document functionality is to provide the mobile friendly feature to the user, to send messages, documents on WhatsApp, Email ,Telegram through ERP.

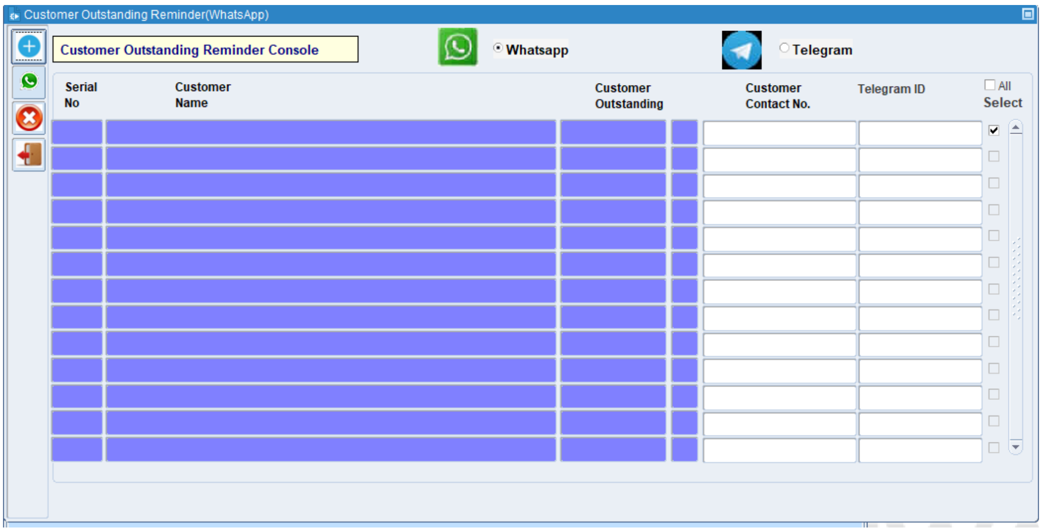
This functionality is provided to send bulk messages/documents and event based messages from the ERP like Sales Order, Invoice, Purchase order copy etc.



3.7 OS Reminder (WhatsApp)

Purpose:

This form is designed to send the messages/document regarding customer outstanding on WhatsApp, Email ,Telegram through ERP.



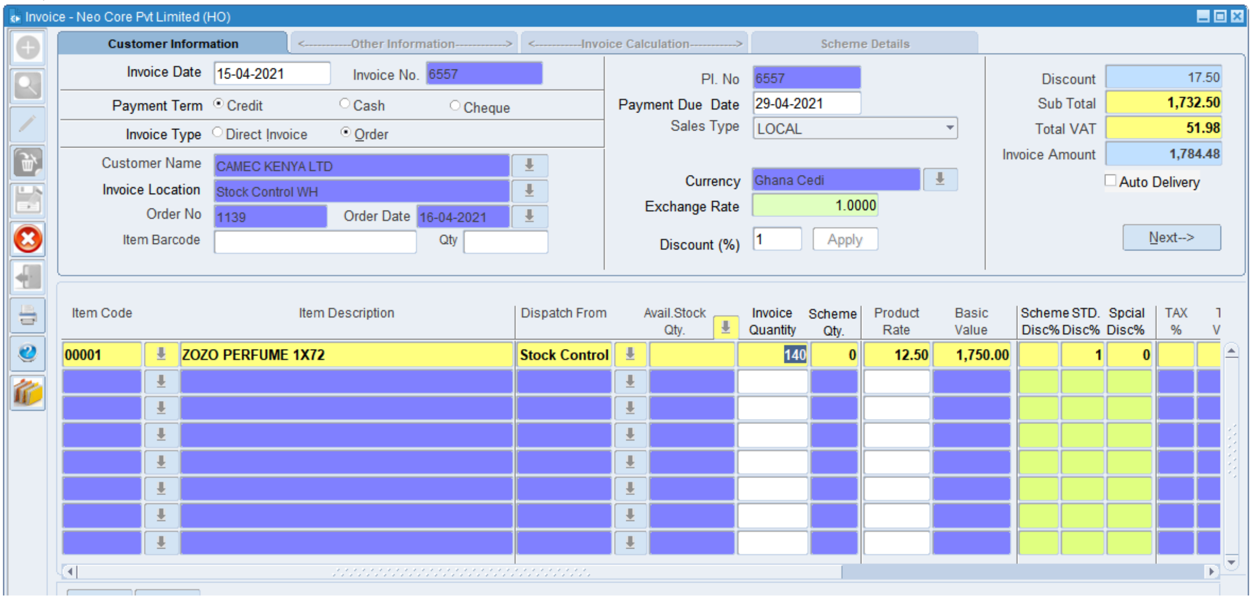
4. INVOICE TRACKING

4.1 DIRECT INVOICE

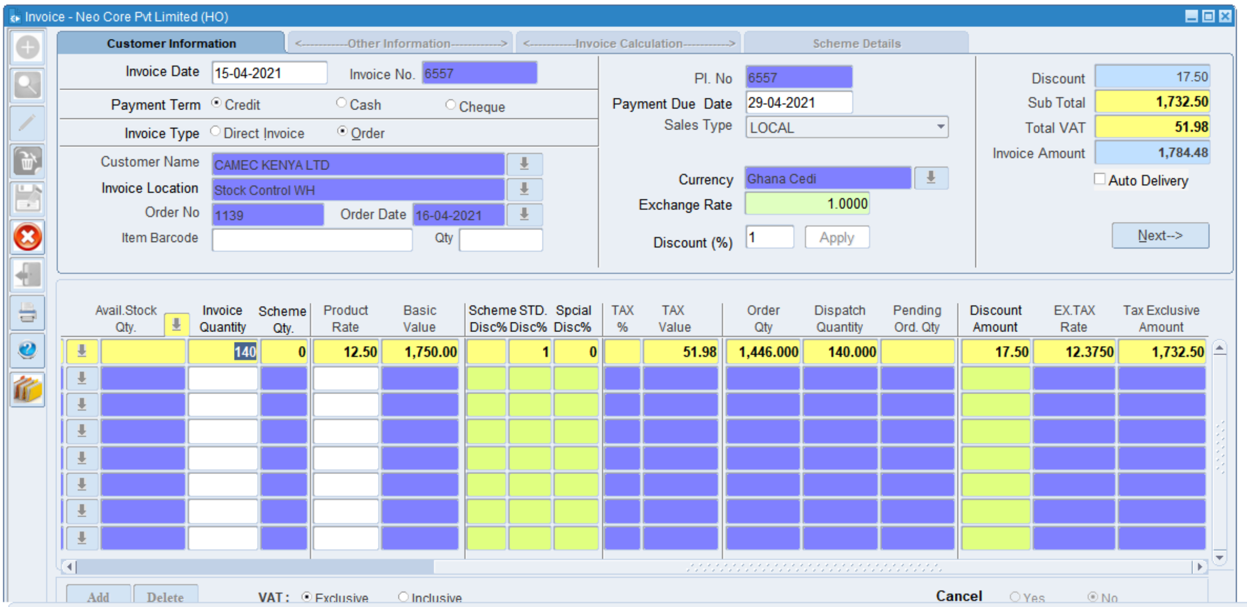
Purpose:

Before the finished goods are dispatched, an Invoice is raised and sent to the customer. This option allows generation and cancellation of an Invoice.

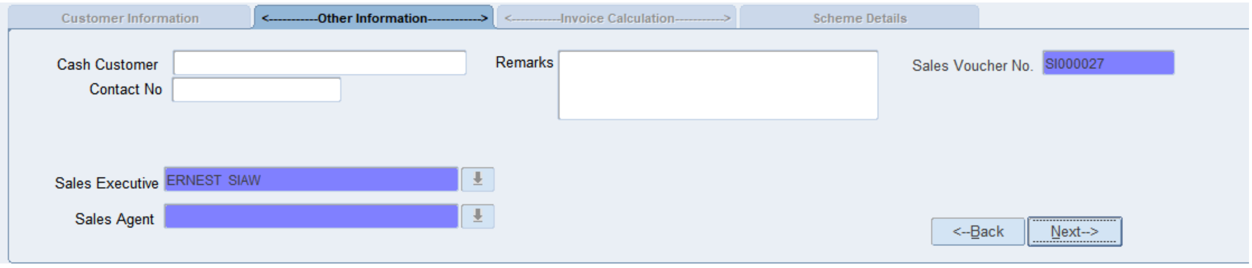
Sample Invoice Screen (First Part)



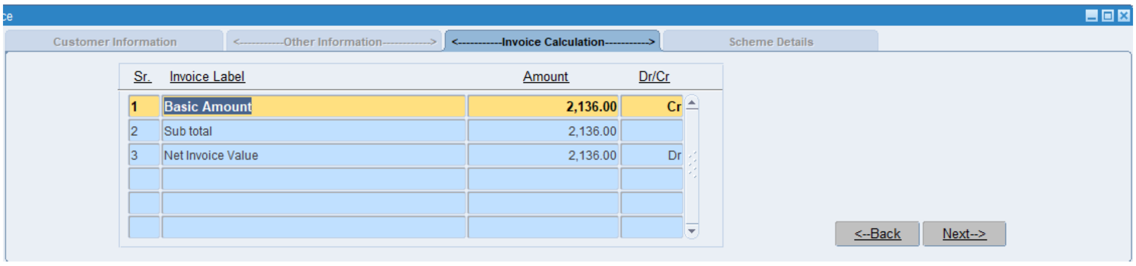
Sample Invoice Screen (Second Part)



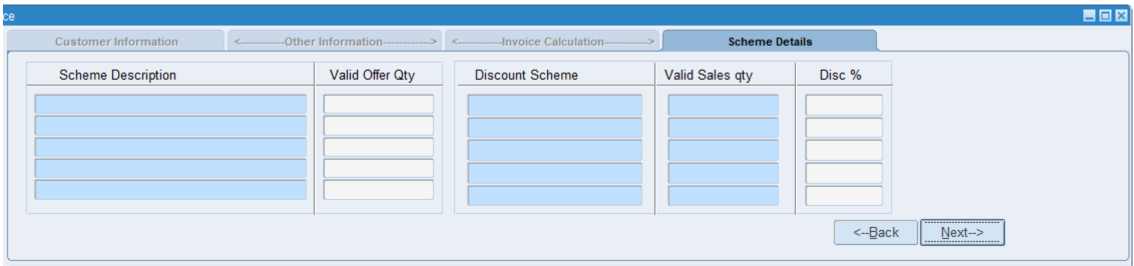
Sample Invoice Screen (Other Information)



Sample Invoice Screen (Invoice Calculation)



Sample Invoice Screen (Scheme Details)



Procedure:

To Add Invoice Details

Click Add on the toolbar. Enter Invoice Date. Select the customer from the list of values. Select invoice location. Select payment terms i.e. cash / credit, in case of 'Cash', the Cash customer name is mandatory. Select the products for which the invoice will be made. Specify invoice quantity. Enter Discount. Invoice Calculation displays the final calculated invoice value. Click Save on the toolbar to save. Invoice Number gets generated. Select Account to be credited or debited from list of values.

To Edit Invoice Details

Click Edit on the toolbar. To cancel Invoice details, click Cancel on the toolbar. A new screen is displayed. Enter search string for Invoice Number. Click on OK button. Select the Invoice Number from list of values. The details of the selected invoice will be displayed. Click on radio button 'Yes' against 'Cancelled' to cancel the Invoice.

To Attach or View Document.

Click Attach or View Document on the toolbar . A new screen is displayed. Select Document type then Select Document Reference number and enter other all other details and click on save button.

To View Invoice Details

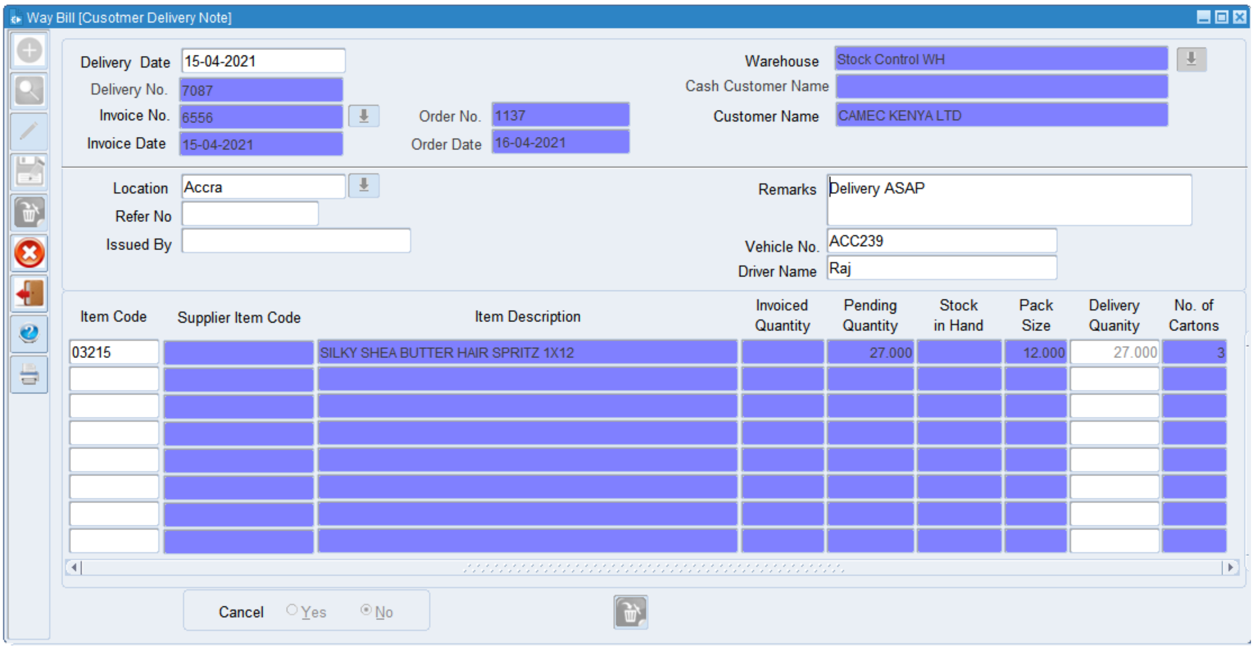
Click View on the toolbar. A new screen is displayed. Select the Invoice Number from list of values; corresponding details are displayed.

4.2 CUSTOMER DELIVERY

Purpose:

Once the invoice for the goods sold is generated in *ebizframe*, the goods sold as per the invoice is delivered to the customer. This option allows generation of a Customer Delivery.

Sample Customer Delivery Screen



Procedure:

To Add a Customer Delivery

Click Add on the toolbar. Enter Delivery Date. Select the warehouse from the list of values to specify the location from which the goods are being delivered. Select the invoice no. from the list of invoices in which the goods are being delivered from the selected warehouse. Item details will be populated automatically according the selected invoice. Specify the lot details. Click Save on the toolbar to save. Invoice Number gets generated.

To View a Customer Delivery

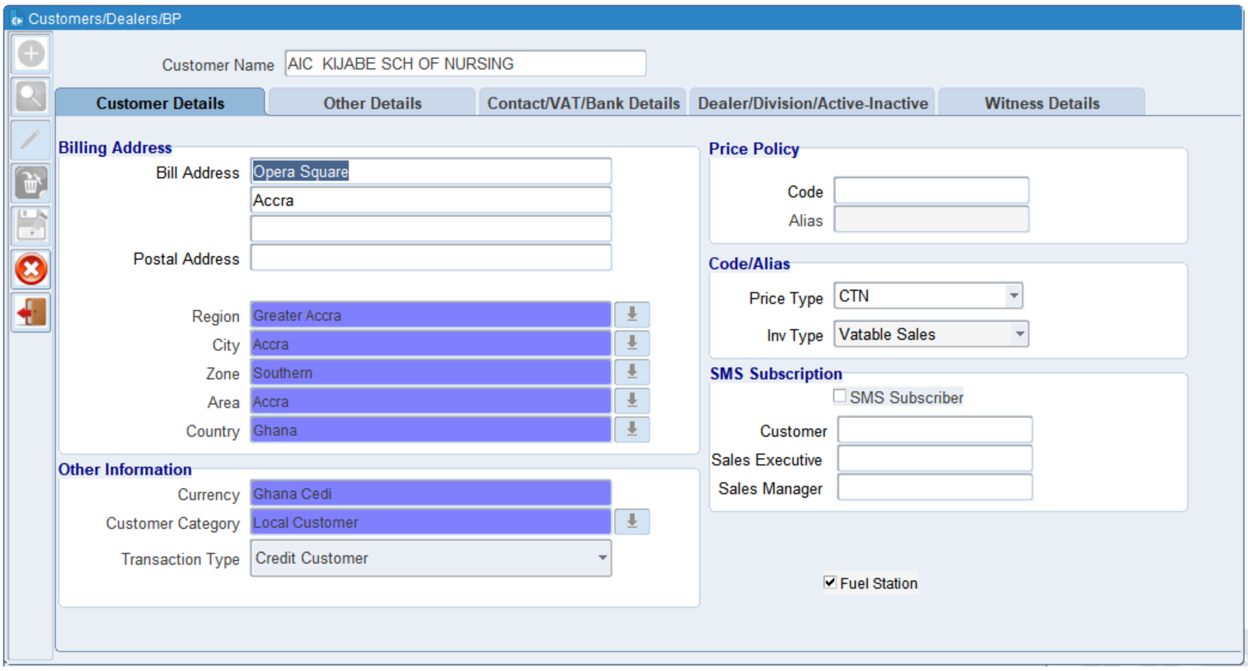
Click View on the toolbar. A new screen is displayed. Select the Invoice Number from list of values; corresponding details are displayed.

5. DEFINITIONS

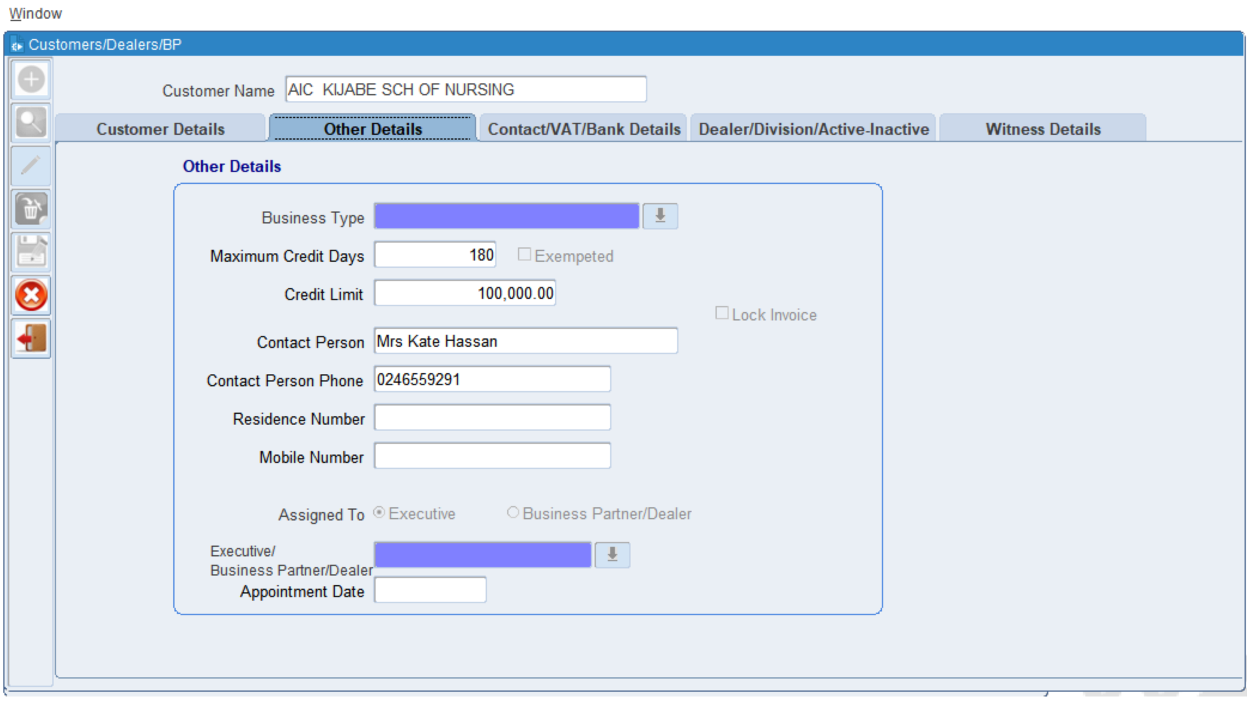
5.1 CUSTOMERS/DEALERS

Purpose:
This option allows you to maintain detailed information regarding customers, dealers and business partners. You can add, update and view the customer/dealer/business partner information.

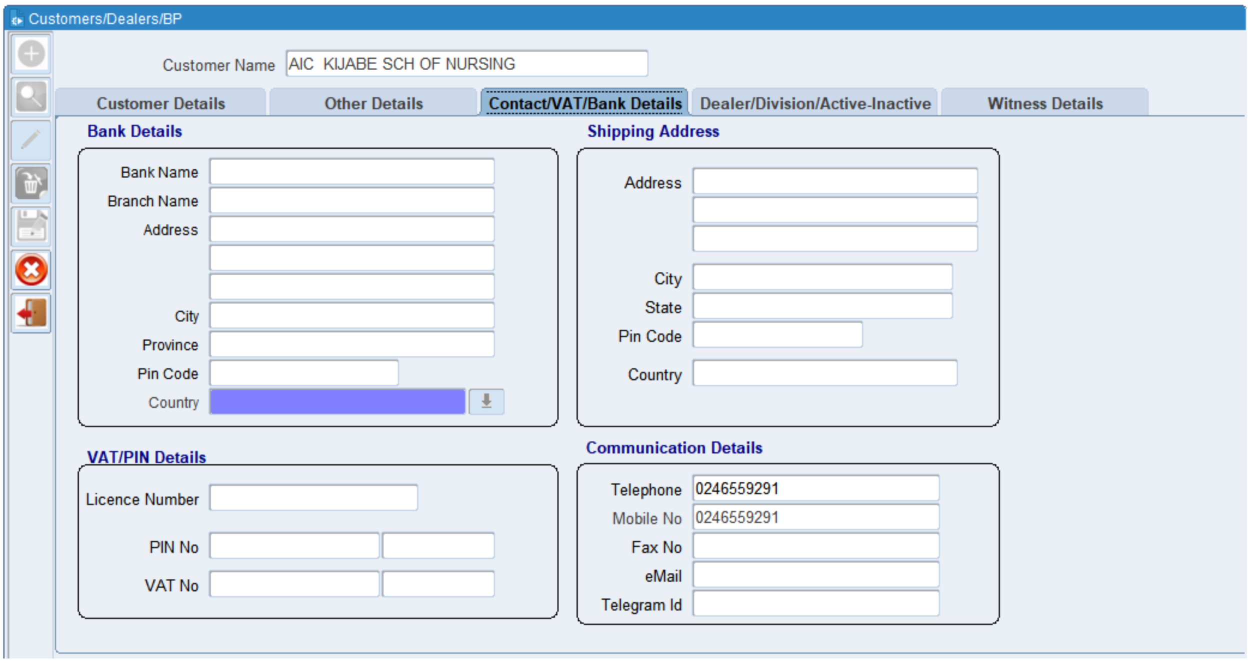
Sample Customers/Dealers Screen



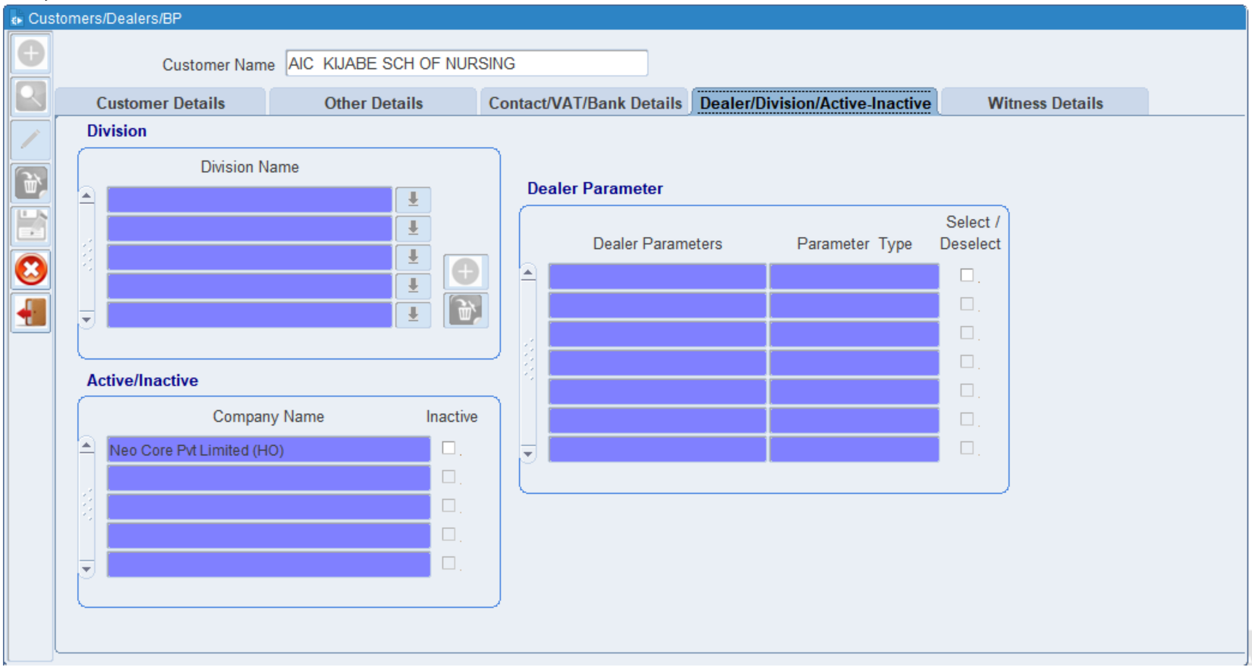
Sample Customers/Dealers (Others Detail) Screen



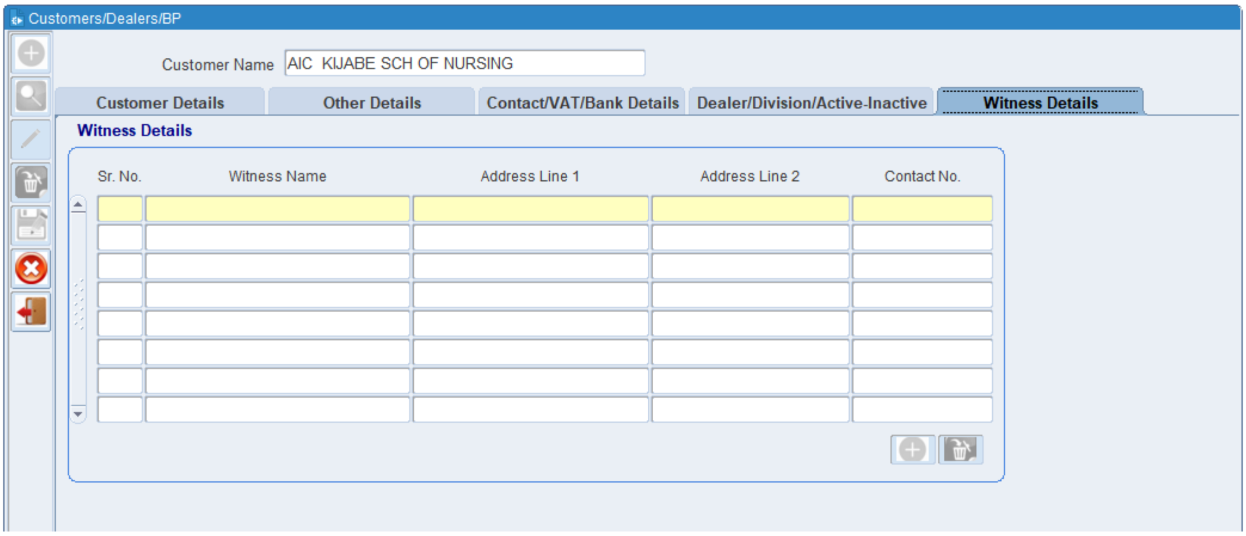
Sample Customers/Dealers (Contact/Vat/Bank Details) Screen



Sample Customers/Dealers (Dealer/Division/Active-Inactive) Screen



Sample Customers/Dealers (Witness Details) Screen



Procedure:

To Add A New Customer/Dealer/Business Partner
Click Add on the toolbar. A new screen is displayed. Click on either Customer to define a new customer, or on Prospect Conversion radio button to convert a prospect to a customer. In case of prospect conversion select Company Name and Customer Name from respective list of values. In case of customer enter the Customer Name.

Enter Alias and Bill Address. Select the City, State, Country and Customer Category from respective LOVs.
Following buttons are provided for additional information:
Communication : Enter the Telephone Number, Fax Number and E-Mail Address of the customer/dealer.
Bank : Enter Bank details, viz., Bank Name, Branch, Address, City, State and Pin Code. Select Country from list of values.
Others : Enter other data relevant to the customer/dealer like Excise Certificate Number, Maximum Credit Days, Credit Limit, Contact Person and Phone Number. Select Business Type of customer from list of values. Enter Residence Number and Mobile number of contact person. Click on appropriate radio button to specify whether the customer is assigned to executive/business partner/dealer. Select Executive/Business Partner/Dealer name from list of values. Dealer/business partner can be assigned to executive only. Enter Appointment Date with the customer.

Click **Save** on the toolbar to save.

To Edit Customer/Dealer/Business Partner Details
Click **Edit** on the toolbar. A new screen is displayed. Enter the search string for Customer Name. Click on OK button. Select the Customer Name from list of values. Details of the selected customer/dealer are displayed. Mark ☑ on Inactive Customer checkbox to indicate if the customer is inactive. Specify the Password that has been defined in the User option under Security (System Administration User Operation Manual, option 3.2). Only authorized users can change the active/inactive status. Make the required changes and save. In case you want to delete the customer/dealer record, click **Delete** on the toolbar.

To View Customer/Dealer/Business Partner Details
Click **View** on the toolbar. A new screen is displayed. Enter search string for Customer Name. Click on OK button. Select the Customer Name from list of values; corresponding details are displayed.

Note:

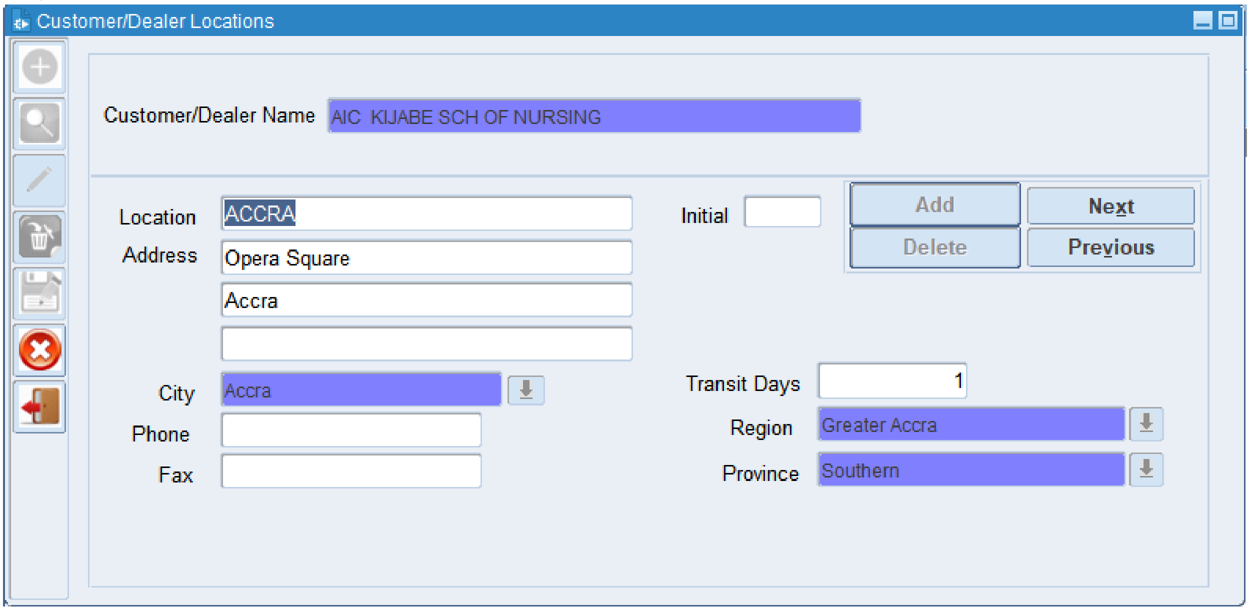
- Only the Head Office of a company defined in *ebizframe* System Administration can add customers/dealers or convert prospect into customer. Data entered in Head office is replicated in all branch offices.

- Customer Name, City, State, Country and Customer Category are mandatory entries for a valid customer/dealer/business partner. The remaining information is optional.
- You cannot delete a customer/dealer/business partner if referenced in Enquiry, Quotation and Order options.
- You cannot change the Customer Name in case an account for that customer/dealer/business partner has been opened in *ebizframe* Finance.
- Dealer's parameters are defined in Other Parameters under Definitions option.

5.2 CUSTOMER/DEALER LOCATIONS

Purpose:
This option is used to maintain information about multiple locations of a customer/dealer. This helps in keeping track of the various locations to which the order of a particular customer/dealer may be dispatched. If a customer/dealer has a new location, this option can be used to add a new location to the customer's/dealer's record. If the customer/dealer discontinues a particular location or changes the details of a location, this option can be used to delete it from the records or make changes to the location details.

Sample Customer/Dealer Locations Screen



Procedure:

To Add A New Customer/Dealer Location
Click **Add** on the toolbar. A new screen is displayed. Enter search string for Customer/Dealer Name. Click on OK button. Select Customer/Dealer Name from the list of values. Enter the new Location Name, Address and Contact Numbers. Enter the approximate number of Transit Days required for the dispatched goods to reach the location. Select Region, State, CST/LST from respective LOVs. Enter LST Number and LST Date. Click **Save** on the toolbar to save.

To Edit Customer/Dealer Locations
Click **Edit** on the toolbar. A new screen is displayed. Enter search string for Customer/Dealer Name. Click on OK button. Select the Customer/Dealer Name from list of values. Dispatch Locations of the selected customer/dealer are displayed along with the corresponding details. Click on Add and Delete buttons to add or delete the multiple locations. Click on Next and Previous buttons to navigate through the various location details. You can change the details of any location. If you want to specify a new location, you can do so by clicking **Add** button on the screen and entering the details on the displayed screen. Make the required changes and save. To delete the record for a particular customer/dealer location, go to the record of that location and click **Delete** button.

To View Customer/Dealer Locations
Click **View** on the toolbar. A new screen is displayed. Enter search string for Customer/Dealer Name. Click on OK button. Select the Customer/Dealer Name from list of values; corresponding details are displayed.

Note:

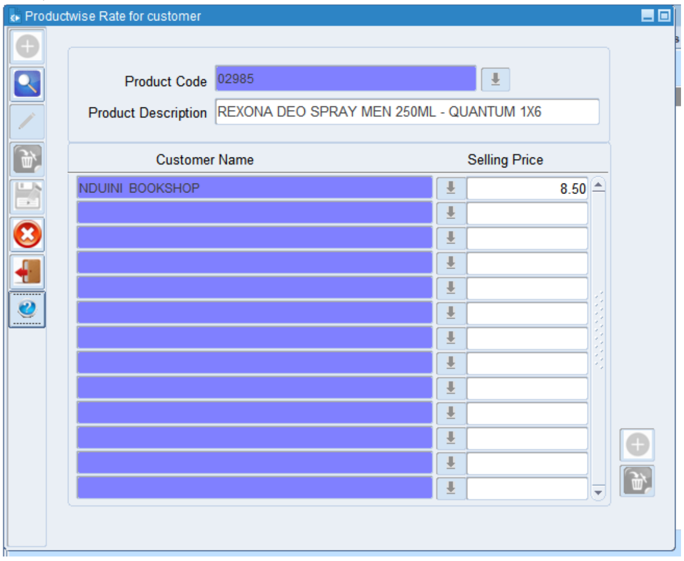
- Location, Region, State and Transit Days are to be entered for a valid customer/dealer location.

- You cannot delete a Location if it has been referenced in Order option and Dispatch to Customer option in *ebizframe* Inventory.

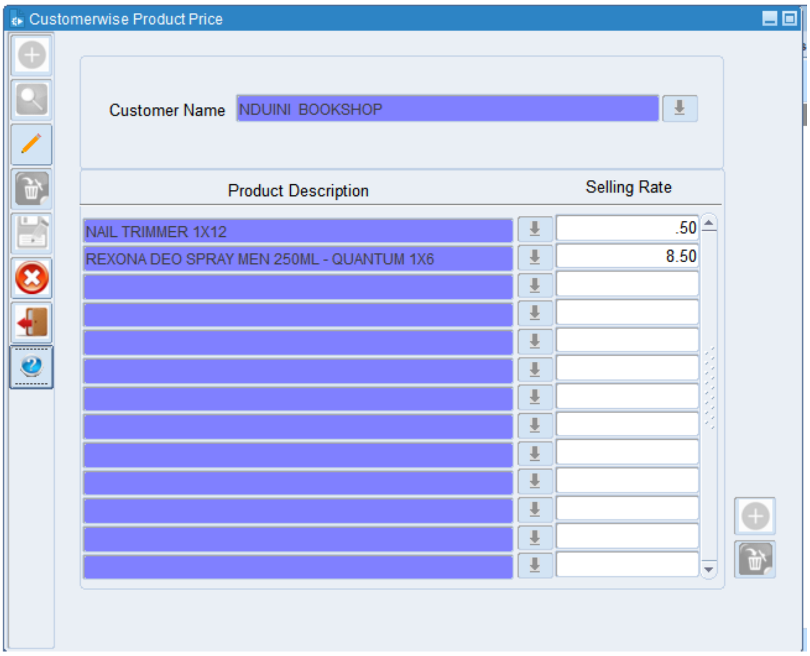
5.3 CUSTOMER PRICE MASTER

Purpose:
In many cases, customers/dealers are quoted prices that are different from the standard price of an item. This option is used to assign Customer Part Number (for an item), and to record price quoted to a customer/dealer for an item and the date from which the price will be effective.

Sample Product-wise Price Master Screen



Sample Customer Price Master Screen



Procedure:

To Add a New Item to Customer/Dealer Price Master
Click Add on the toolbar. A new screen is displayed. Enter search string for Customer/Dealer Name. Click on OK button. Select Customer/Dealer Name from the list of values. Select the Item Code for which you want to quote a special rate to the selected customer/dealer. Corresponding Item Name is displayed. To delete a record, select the particular row and click on Delete button. To add a record, click on Add button. Click Save on the toolbar to save.

To Edit Customer/Dealer Price Details
Click Edit on the toolbar. A new screen is displayed. Select the Customer/Dealer Name from list of values. Make the required changes and save.

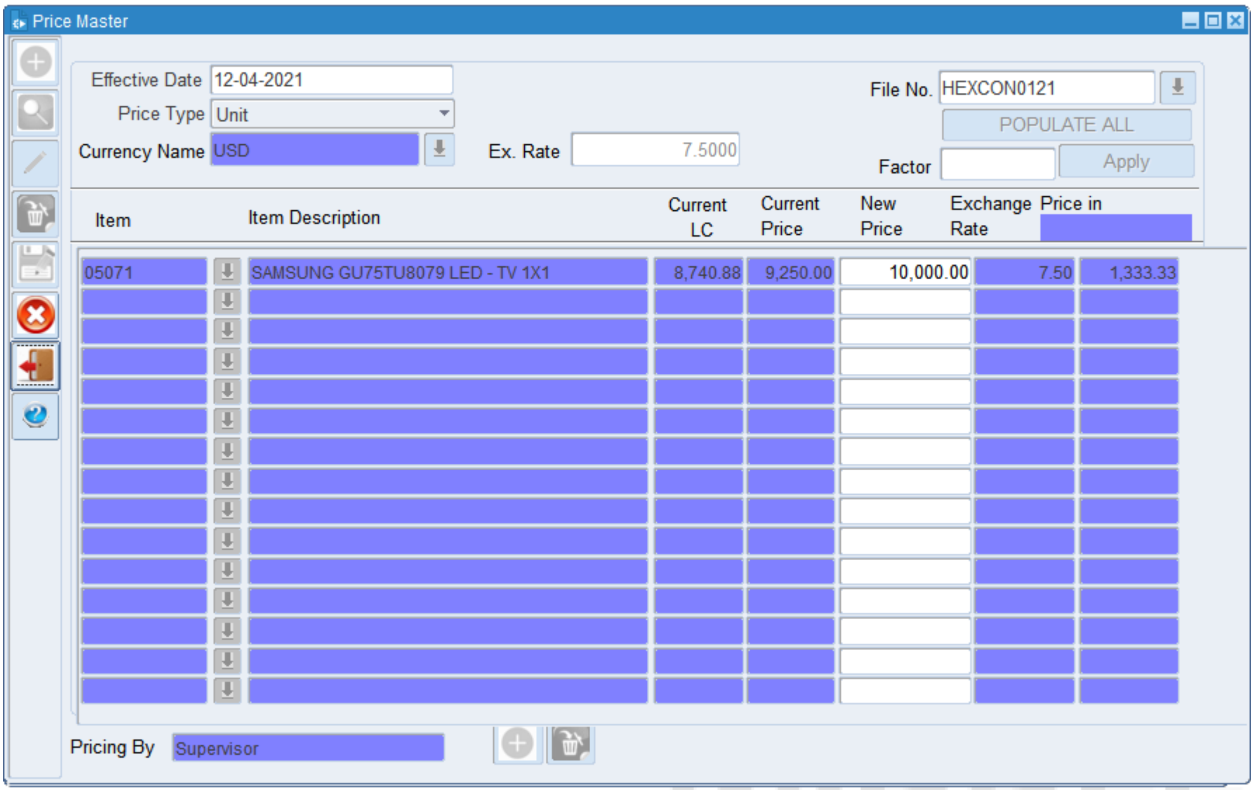
To View Customer/Dealer Price Master Details
Click View on the toolbar. A new screen is displayed. Select the Customer/Dealer Name from list of values; corresponding details are displayed.

5.4 PRODUCT PRICE MASTER

Purpose:

Products may have prices in different currencies. This option is used to assign price to an item in different currencies and the date from which the price will be effective.

Sample Product Price Master Screen



Procedure:

To Add a New Item to Product Price Master

Click Add on the toolbar. Enter Effective Date. Select the currency name from the list of values. Specify the File No. Select the Item Code for which you want to define price. Corresponding Item Name is displayed. To delete a record, select the particular row and click on Delete button. To add a record, click on Add button. Click Save on the toolbar to save.

To Edit Product Price Details

Click Edit on the toolbar. Select the file no. from list of values. Make the required changes and save.

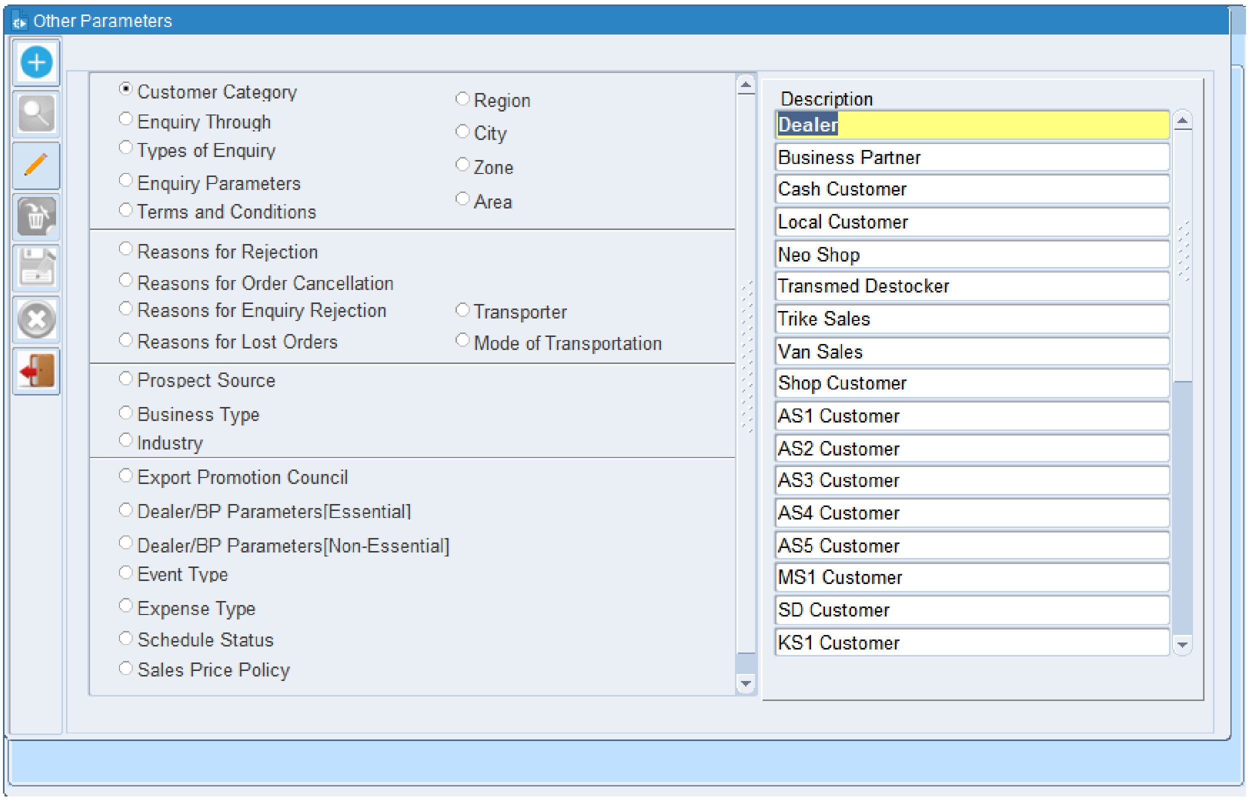
To Product Price Master Details

Click View on the toolbar. Select the file no. from list of values. Corresponding details are displayed.

5.5 OTHER PARAMETERS

Purpose:
This option is used to assign values to different parameters like Customer Category, Mode of Enquiry, Type of Enquiry, Terms and Conditions, Region, City, State, Transporter, Mode of Transport, Reasons of Rejection, Order Cancellation, Lost Order, Dealer Parameters (Essential), Dealer Parameters (Non-Essential), etc. These parameters are displayed as entries in various pre-defined lists of values.

Sample Other Parameters Screen



Procedure:

To Add A New Value to a Parameter
Select the parameter to which you want to add a new value by clicking the radio button next to it. Now click Add on the toolbar and enter a new value for that parameter. Click Save on the toolbar to save.

To Edit Values of a Parameter
Select the parameter for which a value has to be modified by clicking the radio button against it. Now click Edit on the toolbar. Make the required changes and save.

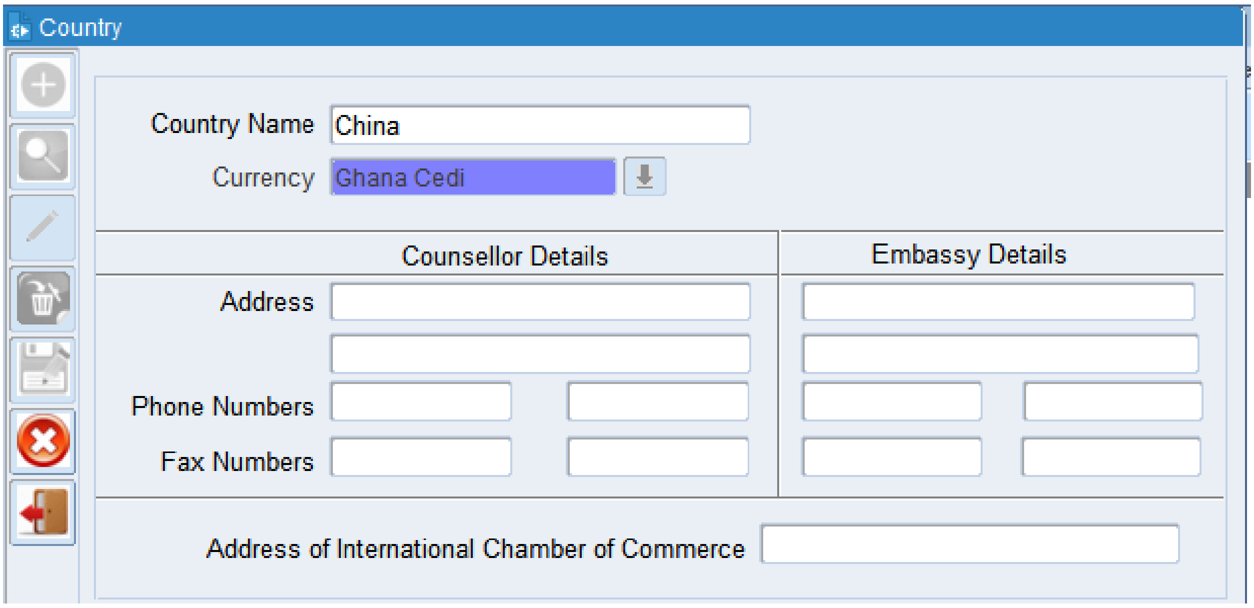
Note:

- Only the Head Office of a company defined in *ebizframe* System Administration can add parameters. Data entered in Head office is replicated in all branch offices.
- These parameters are an integral part of the application and should be updated regularly.
- To view the different values of a parameter, click the radio button against the relevant parameter. All values for that parameter are displayed.
- For 'Customer Category' parameter, all values except 'Dealer' can be changed.

5.6 COUNTRY

Purpose:
This option maintains relevant information about various countries, which is used wherever details of a country are required. You can add a new country along with the corresponding counselor and embassy details. You can also change the details, view and delete the record of an existing country.

Sample Country Screen



Procedure:

To Add A Country
Click Add on the toolbar. Enter the Country Name. Specify the applicable Currency by choosing from the LOV. Enter the details (Address, Phone Numbers and Fax Numbers) for the Counselor and Indian Embassy and the Address of International Chamber of Commerce. Click Save on the toolbar to save.

To Edit Country Details
Click Edit on the toolbar. From the list of values, select the Country Name. Details of the selected country are displayed. You can change all information except Currency. Make the required changes and save.

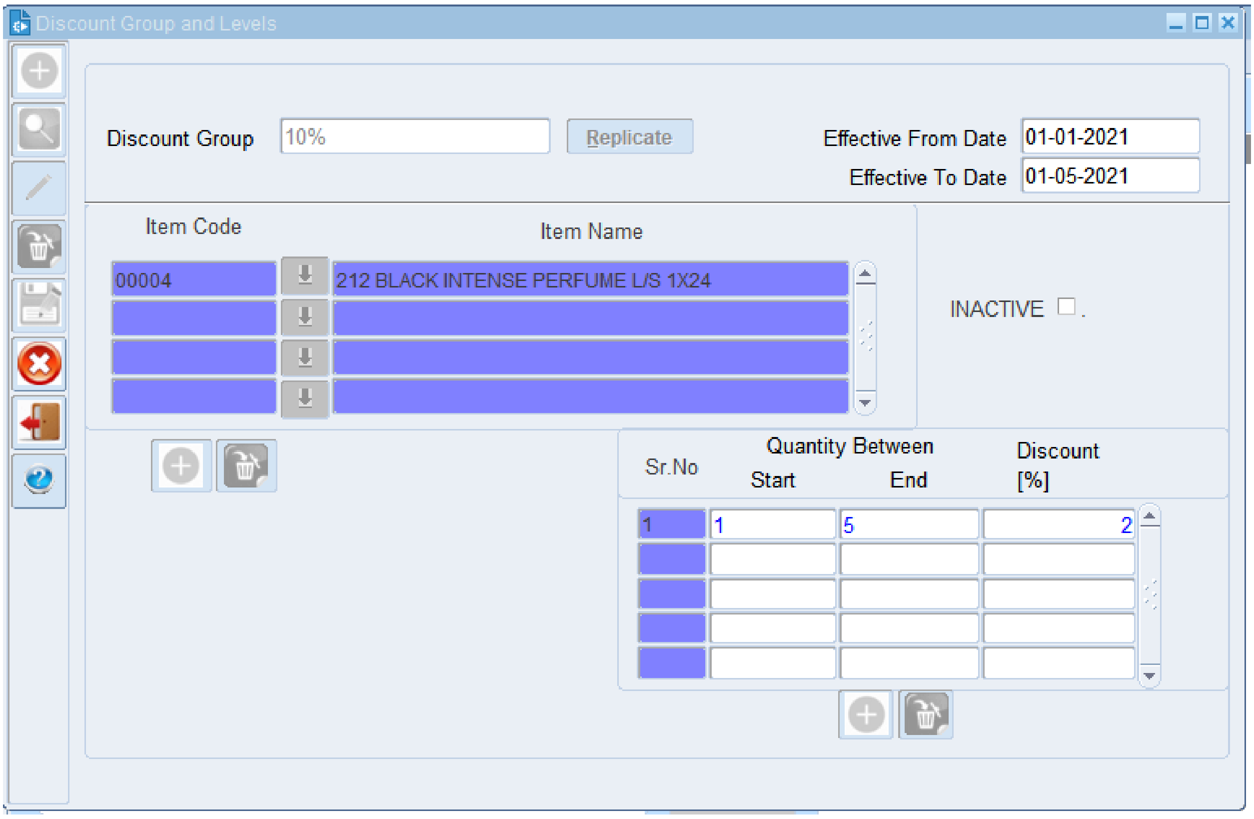
Note:

- Only the Head Office of a company defined in *ebizframe* System Administration can add country. Data entered in Head office is replicated in all branch offices.
- Country Name cannot be left blank.
- Country Name cannot be deleted if it is referenced in any other option.

5.7 DISCOUNT MASTER ITEM WISE

Purpose:
This option can be used to assign discount on Items based on the quantity,

Sample Item Discount Screen



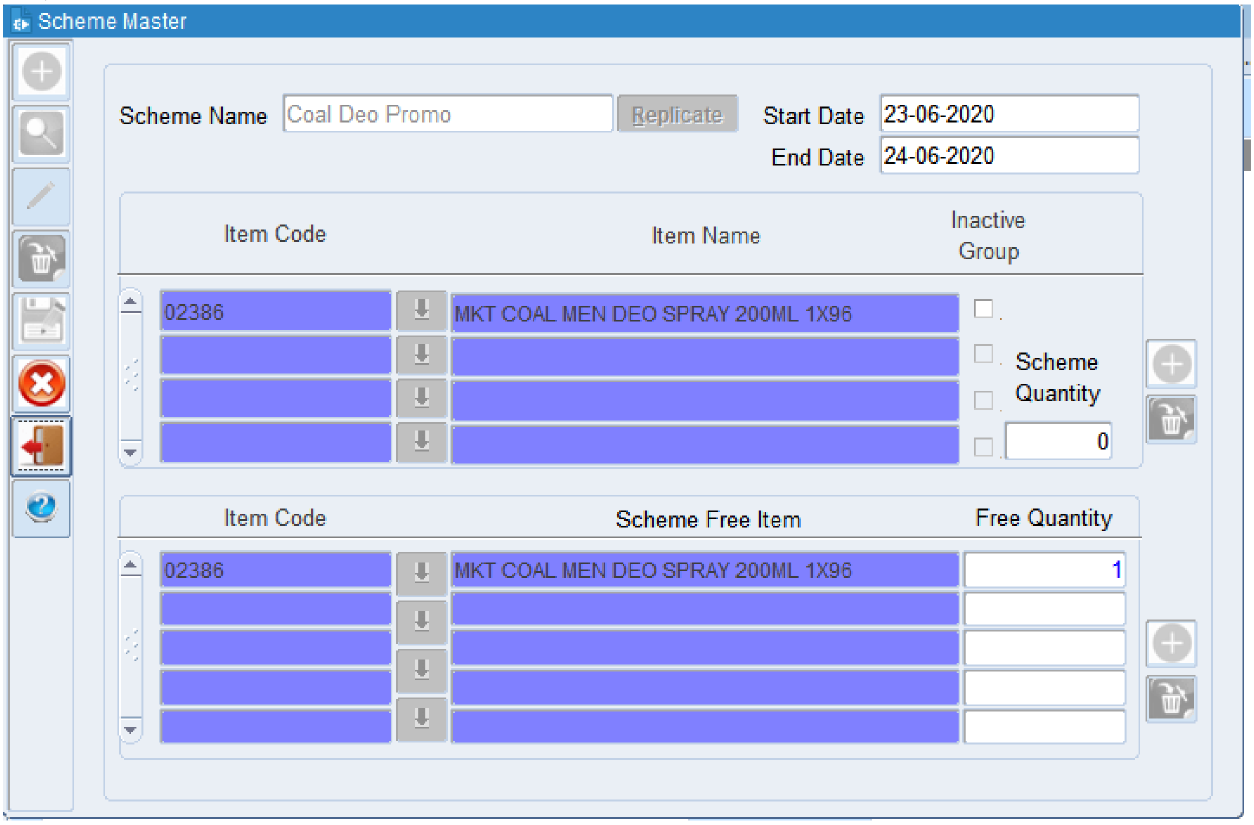
Procedure:

To Add Item Discount
Click Add on the toolbar. Enter the Discount Group Name. Enter Effective From Date and Effective To Date, Select Item, Enter Quantity Start and Quantity Date and Discount. Click Save on the toolbar to save.

5.8 SCHEME MASTER

Purpose: This option can be used to scheme on Items.

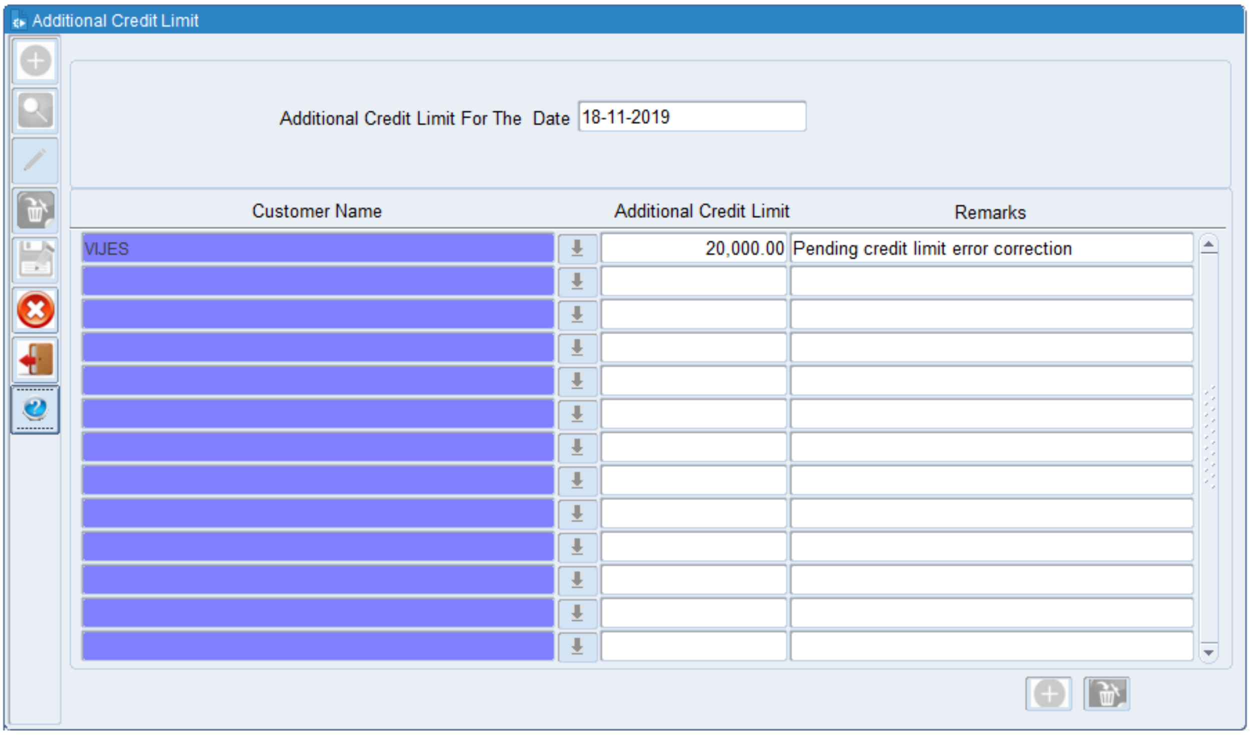
Sample Scheme Master Screen



5.9 ADDITIONAL CREDIT LIMIT

Purpose: This option is used to allow the user to increase the credit limit of customer for the mentioned Date.

Sample ADDITIONAL CREDIT LIMIT



7. APPENDIX

8.6 LIST OF MAIN FEATURES

This section lists out the key features in *ebizframe* Sales.
ebizframe Sales maintains pre-sales, domestic and overseas customers/dealers information and their various dispatch locations.
ebizframe Sales has the provision of handling the transactions in foreign currencies for overseas customers/dealers.
Details of customer/dealer Enquiry and subsequent Quotation are captured. There is provision for maintaining multiple item rates applicable for different periods for each customer or dealer. A quotation can be based on customer/dealer-specific rate or on the standard item rate.

ebizframe Sales maintains history of amendments made to an order.
Order can be Direct, Scheduled, Open. Order Scheduling of scheduled and open orders is done in which the quantity to be dispatched month-wise is specified.
The Dispatch Advices are used by *ebizframe* Inventory to dispatch the goods to the customer/dealer. The inventory is updated for each advice generated and dispatch made.
Sales Invoice captures the VAT and corresponding updations are made in *ebizframe* Finance.
ebizframe Sales also maintains a record of lost jobs; i.e., the quotations that did not result in Order. This helps in identifying the various reasons for losing a particular order and helps in reducing the lost orders by improving upon relevant factors.

8.7 LIST OF MANDATORY FIELDS

This section lists all the fields of *ebizframe* Sales, data entry for which is must. The section sub-headings denote the options in which these appear.

TRANSACTIONS

ENQUIRY

Field Name	Field Description
Enquiry Date	date of the enquiry
Customer/Dealer Name	name of the customer/dealer who made the enquiry
Item Type	can be either Finished Goods or Others
Item Code	code of the item for which enquiry was received
Quantity	Quantity of the item for which enquiry was received
Region	region of the customer/prospect in which sales is to be made
Expected Order Date	expected date of order from customer/prospect who made the enquiry

QUOTATION

Field Name	Field Description
Quotation Date	date of the quotation
Customer/Dealer Name	name of the customer/dealer to whom quotation is being sent
Quotation Type	can be either New or Revised
Item Type	can be either Finished Goods or Others
Item Code	code of the item for which quotation is being sent
Quantity	quantity of the item for which quotation is being sent
Region	region of the customer/prospect in which sales is to be made
Expected Order Date	expected date of order from customer/prospect who made the quotation

LOST QUOTATION

Field Name	Field Description
From Date	date from which lost jobs are to be recorded
To Date	date till which lost jobs are to be recorded
Lost Job Reason	reason for the lost job

ORDER

Field Name	Field Description
Customer/Dealer Name	name of the customer/dealer for whom order is being prepared
Order Date	date of the order
Item Code	code of the ordered item
Dispatch Location	customer's/dealer's location to which order is being dispatched
Ordered Quantity	quantity of the ordered item
Region	region where sales would be carried out

INVOICE

Field Name	Field Description
Invoice Date	date of the invoice
Payment Due Date	date by which payment is to be made by customer/dealer

DEFINITIONS

CUSTOMERS/DEALERS

Field Name	Field Description

Customer/ Dealer/ Executive/ Business Partner Name	name of the customer/dealer
City	city given in the address
State	state given in the address
Country	country given in the address
Customer/Dealer Category	category of the customer/dealer
Bill Address	address of customer

CUSTOMER/DEALER LOCATIONS

Field Name	Field Description
Location	Various locations of the customer/dealer to which order can be dispatched
Transit Days	number of days required for dispatched goods to reach the customer/dealer location
Region	sales region under which the customer/dealer is covered
State	name of the location's state

CUSTOMER/DEALER PRICE MASTER

Field Name	Field Description
Customer/Dealer Name	name of the customer/dealer
Item Code	code of the item
Margin	difference between the actual price of item and the price quoted to the customer/dealer
Margin Type	can be either percentage or amount
Effective Date	date from which the rate specified is applicable

OTHER PARAMETERS

Field Name	Field Description
Description	name or description of the parameter

COUNTRY

Field Name	Field Description
Country Name	name of the country
Currency	currency used in that country

8.8 GLOSSARY OF ABBREVIATED TERMS

This section lists commonly used, standard abbreviated terms in *ebizframe* Sales.

FOB — Free On Board - it is a type of pricing of imported goods, wherein the responsibility of the seller is to place or load the goods on board, free of cost to the buyer at a port of shipment as mentioned in the contract.

C&F — Cost and Freight is a type of pricing of imported goods, wherein the responsibility of the seller is to arrange for carriage of the goods to the port of destination named in the contract. Though the seller bears the freight charges, but the insurance charge of goods is the buyer's liability

CIF — Cost, Insurance and Freight is a type of pricing of imported goods, wherein the seller bears the cost, freight and insurance charges

8.9 ERROR MESSAGES AND TROUBLESHOOTING

Error messages of *ebizframe* Sales are listed in this section. Brief troubleshooting tips are provided with each error message.

SALES

ENQUIRY

Error Message	Troubleshooting
Enquiry date cannot exceed then system date!	Specify enquiry date < system date
Only Head Office is allowed to add new customer!	Go back to the login screen and login as the head office of the company to add details
Customer name not specified!	Specify customer name
Enquiry date not specified!	Specify enquiry date
Item type not specified!	Specify item type
Item code not specified!	Specify item code
Accepted/Rejected not specified!	Specify accepted/rejected
Only Head Office is allowed to add new product!	Go back to the login screen and login as the head office of the company to add product
Quantity range between 0.001 and 99,99,999.999!	Specify quantity between 0.001 and 99,99,999.999
Quantity not specified!	Specify quantity
Item name not specified!	Specify item name
Duplicate item code!	Specify different item code
Customer not specified!	Specify customer
No enquiry type available!	Go to Other Parameters option under Definitions and define enquiry type
No enquiry through available!	Go to Other Parameters option under Definitions and define enquiry through
No enquiry type available!	Go to Other Parameters option under Definitions and define enquiry type
No finished goods available!	Go to Products option under Definitions and define product
Items other than finished goods not available!	Define item in *ebizframe* Inventory
No customers available!	Go to Customers/Dealers option under Definitions and define customer
Enter New Customer Name!	Enter new customer name
Category not specified!	Specify category
Region not specified!	Specify competitor region
Customer not assigned to business partner/executive/dealer!	Assign customer to business partner/dealer/executive
Executive not specified!	Specify executive
Prospect name not specified!	Specify prospect name
No business partners/dealers available in the list!	Go to Customers/Dealers option under Definitions and define business partner and dealer
No executives available in the list!	Define executives in *ebizframe* HR and Payroll
Region not available	Go to Other Parameters option under Definitions and define region
No competitors available	Go to Competitor Master option and define competitor
Competitor not selected	Select competitor from list of values

QUOTATION

Error Message	**Troubleshooting**
Item not specified!	Specify item
Product name not specified!	Specify product name
Prospect name not specified!	Specify prospect
Product rate not specified!	Specify product rate
Quantity not specified!	Specify quantity
Quantity range between 0.01 and 99,99,999.999!	Specify quantity between 0.01 and 99,99,999.999
Rate should be greater than 0!	Specify rate>0
Product description cannot be New Product!	Specify a different item code
Duplicate record!	Specify a different item
Only Head Office is allowed add new customer!	Go back to the login screen and login as the head office of the company to add customer
Quotation date not specified!	Specify quotation date
Customer name not specified!	Specify customer name
Specify the name of the new customer!	Specify the name of the new customer
Quotation date cannot be prior to enquiry date!	Specify quotation date> enquiry date
Only Head Office is allowed add new product!	Go back to the login screen and login as the head office of the company to add product
Item type not specified!	Specify item type
Item code not specified!	Specify item code
Item quantity range between 0.001 and 99,99,999.999!	Specify item quantity between 0.001 and 99,99,999.999
Item quantity not specified!	Specify item quantity
Duplicate customer name!	Specify a different customer name
Old quotation number not specified!	Specify old quotation number
Item value cannot exceed 99,99,99,99,999.99. Reduce quantity!	Reduce item quantity
Quotation date cannot be greater than sysdate!	Specify quotation date< system date
No with effect dates available!	Go to Customers/Dealers Price Master option under Definitions and define item rate for the customer
Customer not specified!	Specify customer
Duplicate record entered!	Specify a different item code
No quotation exists for this customer!	Define quotation for this customer
No old quotations available!	Define quotation for this customer first
Minimum number of copies should be 1!	Specify number of copies >=1
Region not specified!	Specify competitor region
Customer not assigned to business partner/dealer/executive!	Assign customer to either business partner/dealer/executive
Business partner not specified!	Specify business partner/dealer
Expected order date not specified!	Specify expected order date
Expected order date cannot be less than quotation date!	Specify expected order date greater than or equal to quotation date
Executives not available	Go to Customers/Dealers option under Definitions and define region for the customer
Region not available	Go to Other Parameters option under Definitions and define region for the customer
Competitors not available!	Go to Competitor Master option and define competitor
Quantity not specified!	Specify competitor's quantity

Discount not specified	Specify discount given by competitor
Discount cannot be less than zero!	Specify discount greater than zero
Rate not specified!	Specify competitor rate
Rate cannot be less than zero!	Specify competitor's rate greater than zero
Category not selected!	Specify category
No prospects available!	Go to Prospect Master option and define prospect
Filename not specified!	Specify file name
No customers available!	Go to Customers/Dealers option under Definitions and define customer
No finished goods available!	Go to Products option under Definitions and define product
No items available!	Define items in *ebizframe* Inventory
Old quotations not available for this customer!	Define quotation for the customer
No enquiry numbers available!	Go to Enquiry option and add enquiry

LOST QUOTATION

Error Message	**Troubleshooting**
To date cannot be greater than system date!	Specify to date< system date
From date cannot be greater than to date!	Specify from date< to date
No records available between these two dates!	No quotations available in the given range of dates
No records to delete?	No quotations available in lost jobs
From date not specified!	Specify from date
To date not specified!	Specify to date
From date cannot exceed to date!	Specify from date< to date
No quotation number specified!	Specify quotation number
Lost job reason not specified!	Specify lost job reason
No lost jobs available!	No quotations available in lost jobs
No reasons specified!	Specify reasons
No competitor's available in the list!	Go to Competitor Master and define competitor

ORDER

Error Message	**Troubleshooting**
Order value cannot exceed 99,99,99,99,999.99. Reduce quantity!	Specify order value < 99,99,99,99,999.99
Freight value range between 0.01 and 99,99,99,99,999.99!	Specify freight value between 0.01 and 99,99,99,99,999,99
Freight not specified!	Specify freight
Freight value not specified!	Specify freight value
Freight value should exceed 0!	Specify freight value > 0
Only Head Office is allowed to add new customers!	Go back to the login screen and login as the head office of the company to add customer
Order date not specified!	Specify order date
Order date cannot exceed current date!	Specify order date < current date
Order date cannot be less than quotation date!	Specify order date > quotation date
Order type not specified!	Specify order type
Delivery date not specified!	Specify delivery date
Delivery date cannot be less than order date!	Specify delivery date > order date

Customer name not specified!	Specify customer name
New customer name not specified!	Specify customer name
Duplicate customer name!	Specify different customer name
Location not specified!	Specify location
Order against rejection has to be made within six months of the rejection!	Order against rejection has to be made within six months of the rejection
Only Head Office is allowed to add new products!	Go back to the login screen and login as the head office of the company to add new products
Item code not specified!	Specify item code
Item code already exists!	Specify a different item code
Item name not changed for new product!	Specify a different item name for new product
Item name not specified!	Specify item name
Item type not specified!	Specify item type
Unit not specified!	Specify unit
Item rate not specified!	Specify item rate
Quantity not specified!	Specify quantity
Quantity cannot be zero!	Specify quantity > 0
Ordered quantity range between. 001 and 99,99,999.999!	Specify ordered quantity between. 001 and 99,99,999.999
Quantity for open order should be 0!	Specify quantity for open order = 0
Order quantity exceeds quantity returned in sales return by <number> units!	Reduce order quantity by <number> units
Excise (%) range between 0 and 99.99!	Specify excise(%) between 0 and 99,99
Discount (%) range between 0 and 99.99!	Specify discount(%) between 0 and 99,99
Duplicate item entered!	Specify a different item code
Net order value cannot exceed 99,99,99,99,999.99. Reduce quantity!	Reduce order quantity
Net order value cannot exceed 99,99,99,99,999.99. Reduce freight!	Reduce freight value
No financial year open in finance!	Open financial year in *ebizframe* Finance
Location name not specified!	Specify location name
Customer order date cannot be greater than the order date!	Specify customer order date < order date
Customer order amendment date cannot be less than the order date!	Specify customer order amendment date > order date
No sales executive available!	Define sales executive in *ebizframe* HR and Payroll
No dates available!	Go to Customer/Dealer Price Master option under Definitions and define item rates
User name not specified!	Specify user name
Invalid user name!	Specify valid username
Password not specified!	Specify password
Invalid password!	Specify valid password
Region not specified!	Specify region
Dispatch locations not specified!	Specify dispatch location
Basic + excise exceeds 99,99,99,99,999.99 reduce excise!	Specify lower excise value to reduce sum of basic and excise
Subtotal value exceeds 99,99,99,99,999.99!	Modify subtotal value
Subtotal value cannot be less than zero!	Specify subtotal value greater than zero
Net order value exceeds 99,99,99,99,999.99. Reduce freight/excise/taxes!	Reduce excise/freight/taxes
Problem with duty type. Cannot be specified if MRP is applicable!	If MRP is applicable, then duty should be in percentage otherwise in amount

Dealer/business partner cannot be same as customer!	Specify a different name for dealer/business partner and customer
Customer/prospect name not specified!	Specify customer/prospect name
Region not available!	Go to Other Parameters option and define region
No sales executive available!	Define sales executive in *ebizframe* HR and Payroll
No dealer/business partner available!	Go to Customer/Dealer option and define region
Quantity not specified	Specify competitor quantity
Rate not specified	Specify competitor rate
Competitor not selected	Select competitor

INVOICE

Error Message	**Troubleshooting**
Basic value exceeds 99,99,99,99,999.99. Reduce quantity!	Reduce item quantity
Opening Balance of Excise account is less than the Excise amount. Please specify the breakup of Excise.	Specify excise against excise types
Excise breakup exceeds the Excise Amount by <amount>	Specify total (excise breakup) = total excise amount
Excise breakup is less than the Excise Amount by <amount>	Specify total (excise breakup) = total excise amount
Basic + excise exceeds 99,99,99,99,999.99. Reduce excise!	Reduce excise amount
Subtotal value exceeds 99,99,99,99,999.99!	Reduce excise or taxes
Subtotal value cannot be less than 0!	Increase excise or taxes
Net invoice value exceeds 99,99,99,99,999.99. Reduce freight/excise/taxes!	Reduce excise or taxes or freight value
Net invoice value cannot be zero or less!	Increase taxes or freight value or excise
No transporters available!	Go to Other Parameters option under Definitions and define transporter
No excise types available!	Define excise type in *ebizframe* Finance
Basic/Subtotal not specified!	Specify basic/subtotal
Freight value cannot be there unless freight is selected!	Specify freight type
Freight value not specified!	Specify freight value
Freight name not specified!	Specify freight name
Freight type not specified!	Specify freight type
No freight names available!	Define freight in *ebizframe* Finance
Bill Date is not within the current financial year	Specify bill date within the current financial year
No financial year open in Finance!	Open financial year in *ebizframe* Finance
Invoice date not specified!	Specify invoice date
Invoice date cannot be less than challan date!	Specify invoice date > challan date
Invoice date cannot exceed current date!	Specify invoice date < current date
Payment due date not specified!	Specify payment due date
Payment due date cannot be less than invoice date!	Specify payment due date > invoice date
Customer name not specified!	Specify customer name
Item quantity cannot be 0!	Specify item quantity <0
Product rate not specified!	Specify product rate

Total amount allocated against advance exceeds net invoice value!	Specify total (advance amount) <= net invoice amount
Select account to be credited!	Select account to be credited
Percentage cannot be greater than 100	Select percentage <100
Advance cannot be there without any voucher!	Remove advance amount
Advance adjusted cannot exceed the unadjusted amount of this voucher!	Specify total (advance amount) <= total(voucher amount- adjusted amount)
Closing balance cannot be less than excise amount!	Specify excise amount <= closing balance
No transport modes available!	Go to Other Parameters option under Definitions and define transport mode
No challans pending for invoicing!	Define challan in *ebizframe* Inventory
No account exists for this customer!	Define an account for the customer in *ebizframe* Finance
Minimum number of copies should be 1!	Specify number of copies >=1
Filename not specified!	Specify file name
No invoice numbers available!	Define invoice
Freight value range between 0.01 and 99,99,99,99,999.99!	Specify freight value between 0.01 and 99,99,99,99,999.99
Problem with duty type. Cannot be specified if MRP is applicable	If MRP is applicable then duty should be in percentage otherwise in amount

REPORTS

ORDER STATUS - OPEN ORDERS

Error Message	**Troubleshooting**
From date not specified!	Specify from date
To date not specified!	Specify to date
From date cannot exceed to date!	Specify from date < to date
Customer not specified!	Specify customer
To date cannot exceed system date!	Specify to date < system date
From date cannot exceed system date!	Specify from date < system date
Customers not available!	Go to Order option and add orders

CANCELLED ORDERS

Error Message	**Troubleshooting**
From date cannot exceed system date!	Specify from date greater than system date
To date cannot be less than from date	Specify to date greater than or equal to from date
To date cannot exceed system date!	Specify to date less than system date
No customers available with cancelled orders!	Go to Order option and cancel an order
No cancelled orders available!	Go to Order option and cancel an order
From date not specified!	Specify from date
To date not specified!	Specify to date
Customer not specified!	Specify customer
Cancelled order not selected!	Select cancelled order

CANCELLED INVOICES - CONSOLIDATED

Error Message	**Troubleshooting**
From date not specified!	Specify from date

To date not specified!	Specify to date
From date cannot exceed to date!	Specify from date < to date
File name not specified!	Specify file name
To date cannot exceed system date!	Specify to date < system date
From date cannot exceed system date!	Specify from date< system date

CANCELLED INVOICES - DETAILED

Error Message	Troubleshooting
From date cannot be null!	Specify from date
To date cannot be null!	Specify to date
From date cannot exceed to date!	Specify from date < to date
File name not specified!	Specify file name
From date cannot exceed system date!	Specify to date < system date
To date cannot exceed system date!	Specify from date< system date

LISTINGS

CUSTOMERS/DEALERS

Error Message	Troubleshooting
Customer not specified!	Specify customer
Number of copies not specified!	Specify number of copies
Customers not available!	Go to Customer/Dealer option under Definitions and define customer

CUSTOMER/DEALER LOCATIONS

Error Message	Troubleshooting
Customer not specified!	Specify customer
Customers not available!	Go to Customer/Dealer Location option under and define customer location

HISTORY OF PRICES

Error Message	Troubleshooting
Item not selected!	Specify item
Customer not selected!	Specify customer
No item available!	Go to Customer/Dealer Price master option under Definitions and define item price
No customer available!	Go to Customer/Dealer Price master option under Definitions and define item price

DEFINITIONS

CUSTOMERS/DEALERS

Error Message	Troubleshooting
Customers not available!	Define customer
Cannot delete. This customer is being referenced!	This record cannot be deleted as it is being referred in other options of *ebizframe* Sales
Company code not specified!	Specify company code
Customer name not specified!	Specify company name
City not specified!	Specify city
State not specified!	Specify state
Country not specified!	Specify country

Customer category not specified!	Specify customer category
Customer with this name already exists!	Specify a new customer
Countries not available!	Go to Country option under Definitions and define country
Currencies not available!	Define currency in *ebizframe* Finance
Order for this customer exists. Cannot change the category!	The category cannot be changed as the order for this customer exists
Customer categories not available!	Go to Other Parameters option under Definitions and define customer category
Duplicate record cannot be inserted!	Specify a different customer name
Address not specified	Specify address
Executive/Business Partner/Dealer not specified	Specify executive/business partner/dealer name
Dealer/business partner can be assigned only to sales executives	Specify executive
Appointment date cannot be greater than current date	Specify appointment date less than current date
This record has been deleted by another user. Please re-enter	Re-enter data
Record is being saved by another user. Try again!	Save the record again
Only head office is allowed to edit country!	Go back to the login screen and login as the head office of the company to edit details
Customer is referenced-cannot change country!	Country cannot be changed
Only head office is allowed to edit customer name!	Go back to the login screen and login as the head office of the company to edit details
No values available in the list!	Go to Other Parameter option and specify values
Business types not available!	Go to Other Parameter option and specify values
Executives not available!	Define executive in *ebizframe* HR and Payroll

CUSTOMER/DEALER LOCATIONS

Error Message	**Troubleshooting**
Customers not available!	Define currencies in *ebizframe* Finance
No more customers available!	Go to Customer/Dealer option under Definitions and define new customer. Now, in Customer/Dealer Locations option define location.
Cannot delete. Location is being referenced!	Location cannot be deleted as it is being referred in other options of *ebizframe* Sales
Location not specified!	Specify location
Transit days not specified!	Specify transit days
Transit days cannot be negative!	Specify transit days > 0
Region not specified!	Specify region
State not specified!	Specify state
Location not specified!	Specify location
Regions not available!	Go to Other parameters option under Definitions and define regions
This location for the selected customer already exists!	Specify a different location description
Cities not available!	Go to Other parameters option under Definitions and define city
This record has been deleted by another	Re-enter data in this record

user. Please re-enter!	
Transactions exist for this location. Cannot delete!	This record cannot be deleted as it is being referred in other options
Duplicate record cannot be inserted!	Specify different location
Business partner/dealer not available!	Select executive instead of business partner/dealer
Only head office is allowed to enter data!	Go back to the login screen and login as the head office of the company to add details
Only head office is allowed to delete data!	Go back to the login screen and login as the head office of the company to add details
Country not found! Try again!	Select another country

CUSTOMER PRICE MASTER

Error Message	**Troubleshooting**
Customer name not specified!	Specify customer name
Item code not specified!	Specify item code
Margin type not specified!	Specify margin type
Margin not specified!	Specify margin
Margin should be less than 100!	Specify margin>100
Effective date not specified!	Specify effective date
Item already specified for the same date!	Specify a different effective date
Duplicate effective date for item <item code>!	Specify a different effective date
Customer not available!	Go to Customer/Dealer option under Definitions and define new customer
Cannot delete last record!	There should be at least one record to save
Margin should be less than 100!	Specify margin<100
MRP exceeding 99,99,99,99,999.99. Decrease margin!	Reduce margin to adjust MRP below 99,99,99,99,999.99
Items not available!	Go to Item Master option under *ebizframe* Inventory Definitions and define new item.
Duplicate item selected!	Specify a unique item

OTHER PARAMETERS

Error Message	Troubleshooting
Already exists!	Specify a unique description
Description not specified!	Specify description
Only Head office is allowed to add data!	Go back to the login screen and login as the head office of the company to add details
Enter a value!	Specify value
Not allowed to change customer category - Dealer	Customer category- dealer cannot be changed

COUNTRY

Error Message	Troubleshooting
Countries not available!	Define country
Country name not specified!	Specify country name
Currency not specified!	Specify currency
This country is being referred. You cannot delete this record!	This record cannot be deleted as country is being referred in other options of *ebizframe* Sales

8.10 PROCESS FLOW DIAGRAM