Yantra

User Manual

N-Infosoft Pvt. Ltd.

INDEX

MASTERS

- ## Users

Users form is for creating User ids with Page wise permissions, assign date and due date for login into Yantra application.

Create User

1. To create user, click on ‘New’ button.
2. Select the User Name from the Drop down list, enter the Assign date (from this day the login id works), Expiry Date (login id works up to this date).
3. Select the check boxes for access privileges as per the module wise.
4. Enter the password.
5. Click on ‘Save’ button.

Edit User

1. To edit user, click on ‘User Name’ link from the User Details list and click on ‘Edit’ button.
2. Edit the Assign Date, Expiry Date, Assess privileges and enter the Password.
3. Click on ‘Update’ button.

Delete User

1. To delete user, click on ‘User Name’ link from the User Details list.
2. Click on ‘Delete’ button.

Note : For Selecting User Name, Employee Details should be filled from HR Module.

- ## Masters

Masters form is for entering the initial data like Organization information, Item details, Pay mode, Department, Designation etc

SALES & MARKETING

Customer Details

Customer Details form is used for storing the Customer Details, its Unit details and Contact persons etc.

Add Customer

1. To add new Customer, click on 'New' button.
2. Enter the Customer Name, Company Name, Region, Industry Type, Website in Customer Details Section.
3. Enter the Contact Person, Designation, Address, Phone No., Mobile No., Fax No., Email in Corporate Details. To add more Corporate Details click on 'Add Contacts' button, enter the details in Other Corporate Details and click on 'Add' button.
4. To add Units, click on 'Add Units' button. Enter the Unit Name, Address and click on 'Add' button in Unit Details section.
5. In Contact Details section, enter Unit Name, Contact Name, Designation, Phone No., Mobile No., Fax No., Email and click on 'Add' button.
6. Enter Tax details.
7. Click on 'Save' button.

View Customer

1. To View Customer Details, click on 'Customer Name' link from the Customer Details list.
2. If Unit Details available, click on 'Unit name' link to see the Contact Details of that Unit.

Edit Customer

1. To edit Customer, click on 'Customer Name' link from the Customer Details list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Delete Customer

1. To delete Customer, click on 'Customer Name' link from the Customer Details list.
2. Click on 'Delete' button.
3. Confirm the Delete action by clicking on 'Ok' button.

Sales Lead

Sales Lead form is used for storing the Customers Enquiry Details.

Add New Sales Lead

1. To add new Sales Lead, click on 'New' button.
2. Enter the Enquiry Source, Employee Name (Reference person for enquiry), Reference Code (if any), Enquiry Due Date and Description in Enquiry Details Section.
3. Enter the Customer, Unit Name (if available), and Contact Person (if available).

4. Enter the Item Details which are enquired by the customer with the details like Quantity required, Specifications by customer (if requested), Remarks for the selected item and priority requested by customer and click on ‘Add’ button in Interested Products.
5. Add the Interested Products one by one if necessary.
6. Click on ‘Save’ button.

Edit Sales Lead

1. To edit Sales Lead, click on ‘Enq. No.’ link from the Sales Lead Details list and click on ‘Edit’ button.
2. Enter the appropriate details to be edit or change.
3. Click on ‘Update’ button.

Delete Sales Lead

1. To delete Sales Lead, click on ‘Enq. No.’ link from the Sales Lead Details list.
2. Click on ‘Delete’ button.
3. Confirm the Delete action by clicking on ‘Ok’ button.

Assign Sales Lead

1. To Assign Sales Lead, click on ‘Enq. No.’ link from the Sales Lead Details list and Click on ‘Assign’ button.
2. Select the Employee Name, Remarks for that assignment, Assign Date and Due Date and Click on ‘Assign’ button.
3. If the Sales Lead is already assigned and wants to re-assign to another Employee, re-select the Employee Name and click on ‘Re-Assign’ button.

Print Sales Lead

1. To Print Sales Lead, click on ‘Enq. No.’ link from the Sales Lead Details list.
2. Click on ‘Print’ button.

Sales Assignments

Sales Assignments form is used for a view of Assignments from Sales Lead.

View Sales Assignments

1. To View Sales Assignment Details, click on ‘Enquiry. No.’ link from the Assigned Enquiries list.

View Sales Assignments

1. To enter the Follow up description for an Enquiry, click on ‘Enquiry. No.’ link from the Assigned Enquiries list, then click on ‘Follow Up’ button, enter the Follow Up Description and click on ‘Save’ button.
2. To see the history of Follow up details, click on ‘History’ button.

Prepare Quotation

1. To prepare quotation for the Sales Lead, click on ‘Enquiry No.’ link from the Assigned Enquiries list, and then click on ‘Set Quotation’ button.

Sales Quotation

Sales Quotation form is used for preparing Quotation from Sales Lead.

Prepare New Sales Quotation

1. To prepare new Sales Quotation, Click on 'Set Quotation' from Sales Assignments form.
2. Enter the Item Details which are enquired by the customer with the details like Quantity required, Rate, Specifications and click on 'Add' button.
3. Add the Item Details one by one if necessary.
4. Enter the Terms & Conditions, Follow up details and Expected Order etc.
5. Click on 'Save' button.

Edit Sales Quotation

1. To edit Sales Quotation, click on 'Quotation No.' link from the Sales Quotation Details list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Approve Sales Quotation

1. To Approve Quotation, click on 'Quotation No.' link from the Sales Quotation Details list.
2. Click on 'Approve' button.

Regret Sales Quotation

1. To Regret Quotation, click on 'Quotation No.' link from the Sales Quotation Details list.
2. Click on 'Regret' button.

Follow Up Sales Quotation

1. To Enter Follow Up, click on 'Quotation No.' link from the Sales Quotation Details list, click on 'Follow Up'.
2. Enter the follow up details and click on 'Save' button.

Print Sales Quotation

1. To Print Quotation, click on 'Quotation No.' link from the Sales Quotation Details list.
2. Click on 'Print' button.

Prepare Sales Order

1. To prepare Sales Order, click on 'Quotation No.' link from the Sales Quotation Details list.
2. Click on 'Sales Order' button.

Sales Order

Sales Order form is used for preparing Order from Sales Quotation.

Add New Sales Order

1. To add new Sales Order, Click on 'Sales Order' from Sales Quotation form.
2. Enter the Customer's PO No. and Date in Sales Order Section.
3. Enter the Item Details which are ordered by the customer with the details like Quantity required, Rate, Specifications, Priority, Remarks and click on 'Add' button.

4. Add the Item Details one by one if necessary.
5. Enter the CST No. and TIN No. (if available/necessary).
6. Enter the Terms & Conditions, Follow up details (At Customer Place), Invoice To and Consignment To etc.
7. Click on 'Save' button.

Edit Sales Order

1. To edit Sales Order, click on 'Sales Order No.' link from the Sales Order Details list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Delete Sales Order

1. To delete Sales Order, click on 'Sales Order No.' link from the Sales Order Details list.
2. Click on 'Delete' button.
3. Confirm the Delete action by clicking on 'Ok' button.

Approve Sales Order

1. To Approve Order, click on 'Sales Order No.' link from the Sales Order Details list.
2. Click on 'Approve' button.

Print Sales Order

1. To Print Order, click on 'Sales Order No.' link from the Sales Order Details list.
2. Click on 'Print' button.

Prepare Order Profile

1. To prepare Order Profile, click on 'Sales Order No.' link from the Sales Order Details list.
2. Click on 'Order Profile' button

Order Profile

Order Profile form is used for preparing Work Order Profile from Sales Order.

Prepare New Order Profile

1. To prepare new Order Profile, Click on 'Order Profile' from Sales Order form.
2. Enter the Customer's PO No. and Date in Sales Order Section.
3. Enter the Item Details which are ordered by the customer with the details like Quantity required, Rate, Specifications, Priority, Remarks and click on 'Add' button.
4. Add the Item Details one by one if necessary.
5. Enter the CST No. and TIN No. (if available/necessary).
6. Enter the Terms & Conditions, Follow up details (At Customer Place), Invoice To and Consignment To etc.
7. Click on 'Save' button.

Edit Order Profile

1. To edit Order Profile, click on 'Order Profile No.' link from the Order Profile Details list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.

3. Click on ‘Update’ button.

Delete Order Profile

1. To delete Order Profile, click on ‘Order Profile No.’ link from the Order Profile Details list.
2. Click on ‘Delete’ button.
3. Confirm the Delete action by clicking on ‘Ok’ button.

Approve Order Profile

1. To Approve Order, click on ‘Order Profile No.’ link from the Order Profile Details list.
2. Click on ‘Approve’ button.

Print Order Profile

1. To Print Order, click on ‘Order Profile No.’ link from the Order Profile Details list.
2. Click on ‘Print’ button.

Process Status

Process Status form is used for checking the Employee Status is Opened Or Closed.

1. This is used to check the status of the Employee whether the SL Status is Confirmed or Regretted, QTN Status Open or Closed, SO Status Closed or Opened, OP Status Opened or Closed, OA Status Opened or Closed.
2. Select the Employee Name and the select the Name i.e. SL No., QTN No., SO No., OP No., SOA No., DC No. required and then select the No and the click the Go Button.

Agent Master

Agent Master form is used for adding the Agent Details.

Add New Agent Details

1. To add the New Agent Details first click the ‘New’ Button.
2. In the General Details Column add the Details of the Agent i.e. Name, Address, Phone No, E-Mail etc.
3. Add all the general details of the Agent required.
4. Click on ‘Save’ button.

Edit Order Profile

1. To edit the Agent Master Details click Agent Name required editing from the table and then clicking the Edit Button.
2. Then the Details are filled in the General Details table and edit the details required to edit the Agent Master Details and the click the Update Button.

Delete Sales Order

1. To delete the Agent Name click on ‘Agent Name.’ link from the Agent Master Details list.
2. Click on ‘Delete’ button.
3. Confirm the Delete action by clicking on ‘Ok’ button.

Payments Received

Payments Received form is used for payments received from the customer.

Add Payments Received

1. To add new Payments Received from the Customer, Click on ‘New’ Button from Payments Received form.
2. In the General Details, Receipt No is generated automatically and select the Customer Name, Unit Name, Payments For i.e. Spares or Sales.
3. According to the Payments Selected Order No is filled in the Order No and then select the Order No from the and then select the Invoice No. According to that all the Previous Receipt details are filled and the select the Pay mode details i.e. Cash, D.D, Cheque etc.
4. Click on ‘Save’ button.

Edit Payments Received

1. To edit Payment Received, click on ‘Payment.’ link from the Payment Received list and click on ‘Edit’ button.
2. Enter the appropriate details to be edit or change.
3. Click on ‘Update’ button.

Delete Payment Received

1. To delete Sales Order, click on ‘Payment Received.’ link from the Payment Received list.
2. Click on ‘Delete’ button.
3. Confirm the Delete action by clicking on ‘Ok’ button.

EMD Received

EMD Received form is used for entering payment details which are received from the Tenders.

Add EMD Received

1. To add new EMD Received from Tenders, Click on ‘New’ button from EMD Received form.
2. In the General Details, Receipt No and Date is generated automatically and select the Customer Name, Unit Name, Tenders No and the Unit Address, Tender Dated Details, DD Date, Bank Details are filled.
3. According to the Tender No selected Previous Payments are displayed in the List.
4. Enter the remaining EMD charges, Balance Amount, Amount Received, Payment Details
5. Click on ‘Save’ button.

Edit Payments Received

1. To edit EMD Received, click on ‘EMD No.’ link from the EMD Received list and click on ‘Edit’ button.
2. Enter the appropriate details to be edit or change.

3. Click on 'Update' button.

Delete Payment Received

1. To delete EMD Received, click on 'EMD Received.' link from the EMD Received list.
2. Click on 'Delete' button.
3. Confirm the Delete action by clicking on 'Ok' button.

- ## SD & BG

SD & BG form is used for entering Security Deposit and Bank Guarantee details.

Add SD & BG

1. To add new SD & BG details, Click on 'New' button from SD & BG form.
2. In the General Details, Receipt No and Date is generated automatically and select the Tender No, SOP No, Statement Of and select the SD Date.
3. Enter all the remaining details i.e. Customer Name, Unit Address, Unit Address.
4. In the Reference Details list select the Prepared By and Approved By.
5. Click on 'Save' button.

Edit SD & BG

1. To edit SD & BG, click on 'SD No.' link from the SD & BG list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Delete Payment Received

1. To delete SD & BG, click on 'SD No.' link from the SD & BG list.
2. Click on 'Delete' button.
3. Confirm the Delete action by clicking on 'Ok' button.

- ## SD & BG Receipts

SD & BG Receipts form is used for entering Security Deposit and Bank Guarantee details.

Add SD & BG

1. To add new SD & BG Receipts details, Click on 'New' button from SD & BG form.
2. In the General Details, Receipt No and Date is generated automatically and select the Tender No, SOP No, Statement Of and select the SD Date.
3. Enter all the remaining details i.e. Customer Name, Unit Address, Unit Address.
4. In the Reference Details list select the Prepared By and Approved By.
5. Click on 'Save' button.

Edit SD & BG

1. To edit SD & BG Receipts, click on 'SD No.' link from the SD & BG Receipt list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Delete Payment Received

1. To delete SD & BG Receipts, click on 'SD No.' link from the SD & BG list.
2. Click on 'Delete' button.
3. Confirm the Delete action by clicking on 'Ok' button.

Advertising Details

Advertisement Details form is used for entering Advertisement Details.

Advertising Agency

Add Advertising Agency Details

1. To add new Advertising Agency details, Click on 'New' button from Advertising Agency .
2. In the General Details, Enter the Advertising Agency and Description.
3. Click on 'Save' button.

Edit Advertising Agency

1. To edit Advertising Agency, click on 'Advertising Agency Name.' link from the Advertising Agency list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Delete Advertisement Agency

1. To delete Advertisement Agency, click on 'Advertisement Agency Name' link from the Advertisement Agency list.
2. Click on 'Delete' button.
3. Confirm the Delete action by clicking on 'Ok' button.

Advertising Mode

Add Advertising Mode Details

1. To add new Advertising Mode details, Click on 'New' button from Advertising Mode.
2. In the General Details, Enter the Advertising Mode and Description.
3. Click on 'Save' button.

Edit Advertising Mode

1. To edit Advertising Mode, click on 'Advertising Mode Name.' link from the Advertising Mode list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Delete Advertisement Mode

1. To delete Advertisement Mode, click on 'Advertisement Mode Name' link from the Advertisement Mode list.
2. Click on 'Delete' button.
3. Confirm the Delete action by clicking on 'Ok' button.

Advertising Magazine

Add Advertising Magazine Details

1. To add new Advertising Magazine details, Click on ‘New’ button from Advertising Magazine.
2. In the General Details, Enter the Advertising Magazine and Description.
3. Click on ‘Save’ button.

Edit Advertising Magazine

1. To edit Advertising Magazine, click on ‘Advertising Magazine Name.’ link from the Advertising Magazine list and click on ‘Edit’ button.
2. Enter the appropriate details to be edit or change.
3. Click on ‘Update’ button.

Delete Advertisement Magazine

1. To delete Advertisement Magazine, click on ‘Advertisement Magazine Name’ link from the Advertisement Magazine list.
2. Click on ‘Delete’ button.
3. Confirm the Delete action by clicking on ‘Ok’ button.

Size Of Advertising

Add Size Of Advertising Details

1. To add new Size of Advertising, Click on ‘New’ button from Size of Advertising.
2. In the General Details, Enter the Size of Advertising and Description.
3. Click on ‘Save’ button.

Edit Size of Advertising

1. To edit Size of Advertising, click on ‘Size of Advertising Name.’ link from the Size of Advertising list and click on ‘Edit’ button.
2. Enter the appropriate details to be edit or change.
3. Click on ‘Update’ button.

Delete Size of Advertising

1. To delete Size of Advertising, click on ‘Size of Advertising Name’ link from the Size of Advertising list.
2. Click on ‘Delete’ button.
3. Confirm the Delete action by clicking on ‘Ok’ button.

Add Advertising Details

1. To add new Advertising Details, Click on ‘New’ button from Advertising Details form.
2. In the General Details, Advertisement No and Advertisement Date is generated automatically and select the Advertisement Mode, Advertisement Agency, Advertising Magazine.
3. Enter the Name of the Organization, Subscription Date, Event Name, Event On Date, Event Till Date, Sponsorship Mode, Sponsorship Date and select the Advertisement whether it is Approved or Rejected .
4. In the Reference Details list select the Prepared By and Approved By.
5. Click on ‘Save’ button.

Edit Advertising Details

1. To edit Advertising Details, click on ‘Advertisement No.’ link from the Advertisement Details list and click on ‘Edit’ button.

2. Enter the appropriate details to be edit or change.
3. Click on ‘Update’ button.

Delete Payment Received

1. To delete Advertising Details, click on ‘Advertisement No.’ link from the Advertising Details List.
2. Click on ‘Delete’ button.
3. Confirm the Delete action by clicking on ‘Ok’ button.

PURCHASES

- ## Sales Order Acceptance

Sales Order Acceptance form is used for preparing Sales Order Acceptance from Order Profile.

Prepare New Sales Order Acceptance

1. To prepare new Sales Order Acceptance, Click on 'Order Profile No.' from Confirmed Order Details.
2. Enter the Terms & Conditions (if changes are necessary).
3. Enter the Follow up details.
4. Click on 'Save' button.

Edit Sales Order Acceptance

1. To edit Sales Order Acceptance, click on 'Order Profile No.' or 'Order Acceptance No.' link from the Confirmed Orders Details list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Approve Sales Order Acceptance

1. To Approve Order, click on 'Order Profile No.' or 'Order Acceptance No.' link from the Confirmed Order Details list.
2. Click on 'Approve' button.

Print Order Profile

1. To Print Order, click on Order Profile No.' or 'Order Acceptance No.' link from the Confirmed Order Details list.
2. Click on 'Print' button.

- ## Delivery Challan

Delivery Challan form is used for preparing Challan from Sales Order Acceptance.

Prepare New Delivery Challan

1. To prepare new Delivery Challan, Click on 'New' button.
2. In the General Details Select Spares or Sales, According to that Order No is filled.
3. Select the Order No, According to the Selected Order No details are filled in the General Details.
4. In the Delivery Challan Details, Select the Delivery Challan Type, Transporter Name, Dispatch Mode and the remaining necessary details like Doc No, Doc Date etc.
5. In the Item Details, Select the Item Type, Item Name and enter the Quantity required to deliver.
6. Click on 'Save' button.

Edit Delivery Challan

1. To edit Delivery Challan, click on 'SO No.' or 'DC No.' link from the Delivery Challan Details list and click on 'Edit' button.

2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Approve Delivery Challan

1. To Approve Order, click on 'SO No.' or 'DC No.' link from the Delivery Challan Details list.
2. Click on 'Approve' button.

Sales Invoice

Sales Invoice form is used for preparing Invoice Details from Delivery Challan.

Prepare New Sales Invoice

1. To prepare new Sales Invoice, Click on 'New' button.
2. In the General Details, Select Delivery Challan No, Sales Ordered Items List, Delivery Challan List and the remaining details are filled.
3. In the Invoice Details, Select the Invoice Type, Delivery Type.
4. In the Item Details, Select the Item Type, Item Name and enter the Quantity required and then click 'Add' button and we can add multiple items as per the requirements.
5. In the Other Charges, Select Vat or C.S. Tax and enter if any Discount required.
6. Click on 'Save' button.

Edit Sales Invoice

1. To edit Sales Invoice, click on 'DC No.' or 'Sales Invoice No.' link from the Sales Invoice Details list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Approve Sales Invoice

1. To Approve Order, click on 'DC No.' or 'Sales Invoice No.' link from the Sales Invoice Details list.
2. Click on 'Approve' button.

Checking Format

Checking Format form is used for Verification of Purchase Product.

Add New Checking Format

1. To prepare new Checking Format, Click on 'New' button.
2. In the General Details, Select Name of the Instrument Type/Item Type, Item Name and Enter the remaining details.
3. In the Invoice Details/DC Details, Select the PO No and Supplier Invoice No.
4. In the Components List, select the required fields.
5. Click on 'Save' button.

Edit Checking Format

1. To edit Checking Format, click on 'Check Ref No.' link from the Checking Format Details list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Delete Checking Format

1. To delete Checking Format, click on 'Checking Format' link from the Checking Format Details List.
2. Click on 'Delete' button.
3. Confirm the Delete action by clicking on 'Ok' button.

Print Checking Format

1. To Print Checking Format, click on 'Checking Format No.' link from the Checking Format Details list.
2. Click on 'Print' button.

Indent

Indent form is used for Preparing Items to be required to purchase from the Supplier.

Add New Indent

1. To prepare new Indent, Click on 'New' button.
2. In the General Details, Select Department and Follow Up.
3. In the item Details, Select the Item Type, Item Name and enter the remaining required fields.
4. Click on 'Save' button.

Edit Indent

1. To edit Indent, click on 'Indent No.' link from the Indent Details list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Delete Indent

1. To delete Indent, click on 'Indent No.' link from the Indent Details List.
2. Click on 'Delete' button.
3. Confirm the Delete action by clicking on 'Ok' button.

Print Indent

1. To Print Indent, click on Indent No.' link from the Indent Details list.
2. Click on 'Print' button.

Indent Approval

Indent Approval form is used for approving the Indent for the Supplier.

Add New Indent Approval

1. To prepare new Indent, Click on ‘New’ button.
2. In the General Details, Select Indent No.
3. In the Indent Approval Details, Select the Department and Follow Up.
4. In the item Details, Select the Item Type, Item Name and enter the remaining required fields.
5. Click on ‘Save’ button.

<u>Edit Indent Approval</u>

1. To edit Indent Approval, click on ‘Indent No.’ link from the Indent Approval Details list and click on ‘Edit’ button.
2. Enter the appropriate details to be edit or change.
3. Click on ‘Update’ button.

<u>Delete Indent Approval</u>

1. To delete Indent Approval, click on ‘Indent No.’ link from the Indent Approval Details List.
2. Click on ‘Delete’ button.
3. Confirm the Delete action by clicking on ‘Ok’ button.

<u>Print Indent</u>

1. To Print Indent Approval, click on Indent No.’ link from the Indent Approval Details list. Click on ‘Print’ button.

Supplier Enquiry

Supplier Enquiry form is used for enquiring about the Items from Supplier.

<u>Add New Supplier Enquiry</u>

1. To prepare new Supplier Enquiry, Click on ‘New’ button.
2. In the Supplier Enquiry Details, check the Enquiry Originated, Select the Follow Up, Delivery Type and Enter remaining required fields.
3. In the Supplier Details, Select the Supplier Name and Click ‘Add’ button.
4. In the Interested Products, Select the Item Type, Item Name, Priority and enter the remaining required fields, click ‘Add’ button.
5. Click on ‘Save’ button.

<u>Edit Supplier Enquiry</u>

1. To edit New Supplier Enquiry, click on ‘Supplier No.’ link from the Supplier Enquiry Details list and click on ‘Edit’ button.
2. Enter the appropriate details to be edit or change.
3. Click on ‘Update’ button.

<u>Delete Supplier Enquiry</u>

1. To delete Supplier Enquiry, click on ‘Supplier No.’ link from the Supplier Enquiry Details List.
2. Click on ‘Delete’ button.
3. Confirm the Delete action by clicking on ‘Ok’ button.

Print Indent

1. To Print Supplier Enquiry, click on Supplier Enquiry.' link from the Supplier Enquiry Details list. Click on 'Print' button.

Purchase Order Details

Purchase Order Details form is used for preparing Purchase Order for Supplier.

Add Purchase Order Details

1. To prepare new Purchase Order, Click on 'New' button.
2. In the General Details, select Indent Approval No., Supplier Name, Delivery Type, Currency Type and Enter remaining required fields.
3. In the Item Details, Select the Item Type, Item Name and enter the required remaining fields, Click 'Add' button.
4. In the Terms and Conditions, enter the Terms and Conditions, Terms of Delivery etc.
5. In the Pay Terms, check the required fields.
6. In the Payments, enter the required fields.
7. Click on 'Save' button.

Edit Purchase Order Details

1. To edit Purchase Order Details, click on 'PO No.' link from the Purchase Order Details list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

Delete Purchase Order Details

1. To delete Purchase Order Details, click on 'PO No.' link from the Purchase Order Details List.
2. Click on 'Delete' button.
3. Confirm the Delete action by clicking on 'Ok' button.

Approve Purchase Order Details

1. To Approve Purchase Order, click on 'PO No.' link from the Purchase Order Details list.
2. Click on 'Approve' button

Print Purchase Order Details

1. To Print Purchase Order Details, click on 'PO No.' link from Purchase Order Details list.
2. Click on 'Print' button

Supplier Master Details

Supplier Master Details form is used for Supplier Details.

Add Supplier Details

1. To enter new Supplier, Click on 'New' button.

2. In the General Details, select Indigenous or Foreign, enter the required fields and in the basis approval, check the required fields.
3. In the Item Details, Select the Item Type, Item Name and enter the remaining required fields.
4. Click on 'Save' button.

<u>Edit Supplier Details</u>

1. To edit Supplier Details, click on 'Supplier Name.' link from the Supplier Details list and click on 'Edit' button.
2. Enter the appropriate details to be edit or change.
3. Click on 'Update' button.

<u>Delete Supplier Details</u>

1. To delete Supplier Details, click on 'Supplier Name' link from the Supplier Details List.
2. Click on 'Delete' button.
3. Confirm the Delete action by clicking on 'Ok' button.

SERVICES

HR

- ## Employee Master

Employee Master form is used for entering the Employee Details of the Organization.

Add Employee Details

1. To enter new Employee, Click on ‘New’ Button.
2. In the Professional Details, select Department, Designation, Employee Type, Data of Appointment, Date of Termination (if applicable).
3. Enter the Employee Details like First Name, Middle Name, Last Name, Gender, Address, and City.
4. Enter the Personal Details like Date of Birth, Phone No., Email, Mobile No. etc.
5. Enter the User Name (This User Name will be authenticated into Yantra Application).
6. Click on ‘Save’ button.

Edit Employee Details

1. To edit Employee Details, click on ‘First Name’ link from the Employee Master list and click on ‘Edit’ button.
2. Enter the appropriate details to be edit or change.
3. Click on ‘Update’ button.

Delete Employee Details

1. To delete Employee Details, click on ‘First Name’ link from the Employee Master List.
2. Click on ‘Delete’ button.
3. Confirm the Delete action by clicking on ‘Ok’ button.

Note: This User Name will be used for login authentication and User Details can be created by the Administrator (who have access to User Details form in Master Module.

REPORTS

SM EOD Reports

SM EOD Reports form is for accessing reports of Sales & Marketing Module.

MIDS – Expected Orders

1. To access the MIDS report, click on 'MIDS' in Side menu.
2. Enter the Year, select the Month, Employee Name and Customer Status.
3. Click on 'Run Report' button.

MPDS

1. To access the MPDS report, click on 'MPDS' in Side menu.
2. Enter the Year, select the Month, Employee Name and Customer Status.
3. Click on 'Run Report' button.

EMD Received

1. To access the EMD Received report, click on 'EMD Received' in Side menu.
2. Enter the From Date and To Date of the EMD Received.
3. Click on 'Run Report' button.

EMD List

1. To access the EMD list report, click on 'EMD List' in Side menu.
2. Enter the From Date and To Date of the EMD List.
3. Click on 'Run Report' button.

Sales Outstanding

1. To access the Sales outstanding report, click on 'Sales Outstanding' in Side menu.
2. Enter the Year, select the Month, Employee Name, Customer Status and Department.
3. Click on 'Run Report' button.

Sales Outstanding (Customer Wise)

1. To access the Sales outstanding (Customer Wise) report, click on 'Sales outstanding (Cust Wise)' in Side menu.
2. Enter the Year, select the Month, Employee Name, Customer Status and Department.
3. Click on 'Run Report' button.

Advertising Outstanding

1. To access the Advertising Outstanding report, click on 'Advertising Outstanding' in Side menu.
2. Select the Advertising Mode, Advertising Agency and No. of Days.
3. Click on 'Run Report' button.

SD/BG Statement

1. To access the SD/BG Statement report, click on 'SD/BG Statement' in Side menu.
2. Select the Customer Name and Statement Of.
3. Click on 'Run Report' button.

SCM EOD Reports

SCM EOD Reports form is for accessing reports of Purchase Module.

Goods Receipt

1. To access the Goods Receipt report, click on ‘Goods Receipt’ in Side menu.
2. Enter the Invoice Date for which goods receipt to be generated.
3. Click on ‘Run Report’ button.

Dispatch Details

1. To access the Dispatch Details report, click on ‘Dispatch Details’ in Side menu.
2. Enter the Dispatch Date for which the Dispatch details to be generated for the day.
3. Click on ‘Run Report’ button.

Suppliers Evaluation

1. To access the Suppliers Evaluation report, click on ‘Suppliers Evaluation’ in Side menu.
2. Enter the Financial Year, select the Supplier Name, Item Type and Item Name and Click on ‘Go’ button.
3. Enter the Reference No. and Date, Enter the PO No., PO Date, Quality %, Delivery %, Service Response % and Total % and Click on ‘Add’ button.
4. Add the Specifications one by one if necessary.
5. Click on ‘Run Report’ button.

Approved Suppliers

1. To access the Approved Suppliers list report, click on ‘Approved Suppliers’ in Side menu.
2. Select ‘Indigenous’ or ‘Foreign’ option and select Basis of approval.
3. Click on ‘Run Report’ button.

Closing Stock

1. To access the Closing Stock report, click on ‘Closing Stock’ in Side menu.
2. Select the Item Type for which the closing stock to be generated for current date.
3. Click on ‘Run Report’ button.

Purchase Order List

1. To access the Purchase Orders List report, click on ‘Purchase Orders List’ in Side menu.
2. Enter the From Date and To Date of the Purchase Order List.
3. Click on ‘Run Report’ button.

Services EOD Reports

Services EOD Reports form is for accessing reports of Services Module.

<u>Pending Payments</u>

1. To access the AMC Pending Payments report, click on 'Pending Payments' in Side menu.
2. Enter the Year, select the Month, Employee Name and Customer Status.
3. Click on 'Run Report' button.

<u>Spares Order Profile</u>

1. To access the Spares Order Profile list report, click on 'Spares Order Profile' in Side menu.
2. Enter the From Date and To Date of the Spares Order Profile List.
3. Click on 'Run Report' button.

<u>AMC Order Profile</u>

1. To access the AMC Order Profile list report, click on 'AMC Order Profile' in Side menu.
2. Enter the From Date and To Date of the AMC Order Profile List.
3. Click on 'Run Report' button.

<u>Service Report List</u>

1. To access the Service Report List, click on 'Service Report List' in Side menu.
2. Enter the From Date, To Date and Service Type.
3. Click on 'Run Report' button.

<u>Complaint Record List</u>

1. To access the Complaint Record List report, click on 'Complaint Record List' in Side menu.
2. Enter the From Date and To Date of the Complaints.
3. Click on 'Run Report' button.