**SOW: CRM System for Sanitary Ware & Plumbing Products – Jain Impex**

**Purpose:** To digitize and centralize operations such as sales, purchase, dealer-wise pricing and scheme handling, supplier incentive tracking, HRMS for employees, and dedicated mobile apps for dealers, sales executives, and delivery personnel.

**PART A: CRM BACKEND SYSTEM FLOW**

**1. USER ROLES AND MODULE ACCESS (CRM Dashboard)**

| **Role** | **Access Modules** |
| --- | --- |
| Super Admin | Full system control, master setup, reporting, audit logs |
| Admin/Sub-Admin | Configurable access to assigned modules |
| Sales Executive | Assigned regions, performance tracking, dealer reports |
| Delivery Executive | Delivery route planning, proof submission |
| Dealer | Access via dealer mobile app only |
| Purchase Manager | PO, GRN, Invoice, Supplier scheme ledger |
| Finance Team | Receivables, payables, cheque mgmt, incentive reconciliation |
| HR Manager | Attendance, payroll, leaves, salary sheets |

**ADMIN DASHBOARD FLOW**

1. **Master Management**
   * Product Master: Code, HSN, Description, Unit, GST, Rate Slabs
   * Category/Subcategory Setup
   * Price Tier Mapping: Category-wise & Dealer-type wise pricing
   * Dealer Master: Type, Region, Assigned SE, Credit Limit, Credit Days
   * Supplier Master: GSTIN, Scheme Type, Payment Terms
   * Employee Master: Roles, App Access, Attendance Type, Salary Type
2. **Sales & Purchase Management**
   * Sales Order Dashboard: Dealer-wise, Product-wise, Region-wise
   * Dealer-Specific Discounts: Flat, Slab, Scheme Points
   * PO Management: Multi-level Approval, Supplier Scheme Mapping
   * GRN Entry: Qty Received, QC Status, Damage Entry
   * Invoicing & Dispatch: Auto-tied to stock, Bill Print with Scheme/Rate Details
3. **Inventory & Warehouse Control**
   * Warehouse Master: Zone-wise, Product Holding
   * Stock Transfer: Inter-warehouse, with tracking ID
   * Real-time Stock Report: Location & Blocked Stock Details
   * Damaged/Expired Goods Entry & Adjustment
4. **Finance & Accounts**
   * Customer Ledger: Live OS, Bill-wise Ageing, Last Payment
   * Credit Days Monitoring: Auto-reminders to Sales Exec & Dealer
   * Supplier Ledger: Due vs Paid, Outstanding Scheme Amounts
   * Cheque Management: Received, Cleared, Bounced Alerts
   * Auto Reconciliation: Invoice Matching, Discrepancy Logging
5. **Supplier Scheme & Incentive Tracking**
   * Supplier-wise Scheme Entry: Type (Qty/Value), Validity Period
   * Auto-Calculation on Purchase Entry
   * Scheme Due vs Received Analysis
   * Claim Submission to Supplier with Uploads
   * Reconciliation Tracker with Ledger View
6. **HRMS Admin**
   * Geo Attendance Monitoring: Daily Logs + Late Entry Alert
   * Shift Mapping: Department-wise + Holiday List
   * Salary Processing: Basic + OT + Incentives
   * Daily Wage Worker Management: Site + Task Based Entry
   * Overtime Calculation: Hourly or Fixed Slab Based
7. **Expense Management**
   * Expense Head Master: Travel, Phone, Lodging etc.
   * Employee-wise Claim Approval Flow
   * Document Upload & Verification Tracker
8. **Reports & Logs**
   * Subadmin Activity Logs: Module Accessed, Time Stamp
   * Download Logs: Who downloaded what report
   * Dealer Performance: Category-wise Sales, Scheme Earned
   * Profit Analysis:
     + Bill-wise Profit = (Invoice Value - Purchase Cost - Discount Given)
     + Category-wise & Product-wise Gross Margin
     + Sale vs Purchase Price Deviation Report
   * Export Options: PDF, Excel, CSV

**SUBADMIN PANEL FLOW**

1. **Access Control**
   * View Limited to Assigned Dealers, Territories, and Modules
   * Cannot Modify Critical Master Data
2. **Approval Workflow**
   * Sales Order Edit/Approval (if enabled)
   * PO & Expense Claim Review with Logs
3. **Tracking & Reporting**
   * Assigned Dealer-wise Sales/Collection
   * Sales Executive Performance in Assigned Zone
   * Credit Ageing Monitor & Alerts
4. **Logs & Notifications**
   * Dealer Follow-up Reminders
   * Visit Summary & Missed Dealer Alerts
   * Change History: Rate Edits, Discount Overrides

**PART B: APP FLOWS**

**1. DEALER APP**

**HEAD-WISE FLOW**

* **Authentication:**
  + Mobile number > OTP Verification
* **Dashboard:**
  + Total Outstanding
  + Ageing Buckets
  + Credit Limit & Available Balance
  + Scheme Points & Claimable Gifts
* **Order Management:**
  + Product Catalog by Category
  + Rate Auto-Fetched based on Dealer Type
  + Auto-Apply Scheme, Discounts & Gifts
  + Order History with Status & POD
* **Accounts Module:**
  + Invoice Download (PDF with Bill-wise Status)
  + Statement of Account: OS, Payment Summary, Credit Days Left
* **Notifications:**
  + Push for Offers, Payments, Scheme Expiry, Dispatch Update
* **Support Module:**
  + Complaint Ticketing
  + Return Request Entry
  + Live Chat with Executive

**2. SALES EXECUTIVE APP**

**HEAD-WISE FLOW**

* **Login + Attendance:**
  + Mobile Login > OTP > GPS Tagging > Selfie Verification
* **Daily Route Plan:**
  + Auto-Sync Dealer List by Area Assigned
  + Start Route > Check-in Time > End Route
  + Dealer Visit Checklist > Submit Remarks
* **Dealer Insights:**
  + Dealer OS, Ageing, Last Purchase
  + Scheme Points Pending, Product Push Recommendations
* **Sales Order Entry:**
  + Dealer Code > Select Products > Quantity > Scheme Auto-Applied
  + Confirm Order > Submit to Admin Panel
* **Collection & Receipt Upload:**
  + Enter Amount, Mode (NEFT/Cheque/Cash)
  + Receipt Upload with Image + Bank Name
* **Target Dashboard:**
  + Daily, Weekly, Monthly Target vs Achievement
  + Bonus/Commission Tracker
* **Expenses:**
  + Add New Expense > Category > Amount > Upload Bill > Submit
  + Status: Pending / Approved / Rejected
* **Admin Monitoring:**
  + GPS Live Tracking Map
  + Missed Visit Alerts
  + Visit History with Notes

**3. DELIVERY EXECUTIVE APP**

**HEAD-WISE FLOW**

* **Authentication:**
  + OTP Login / Biometric
* **Delivery Assignment:**
  + List of Assigned Orders for the Day
  + Route Optimization with Map View
* **Delivery Execution:**
  + Delivery OTP Entry by Dealer
  + Upload POD / Invoice Image
  + Status: Delivered / Reschedule / Failed
* **Cash/Cheque Collection:**
  + Entry of Amount Collected
  + Receipt Upload / Manual Entry
* **Delivery Confirmation:**
  + Admin Panel Sync
  + Escalation Alert if Delivery Missed or Delayed