

Zoho Creator Data Models

ERP Implementation Team

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1 Zoho Creator ERP Data Models

This catalogue enumerates every Zoho Creator form, subform, and lookup that powers the ERP. Each section lists all fields required by the business requirements, grouped by module. Use these definitions when building forms, importing legacy data, and configuring automation.

Field Legend

- **Link Name** – Internal Zoho Creator variable/field link name generated in snake_case.

- **Type** – Suggested Zoho Creator field type (Single Line, Dropdown, Date-Time, Lookup, File Upload, Subform, etc.).
- **Req.** – Y if mandatory at record creation, C if conditionally mandatory, blank otherwise.
- **Notes** – Validation, defaulting, lookup behaviour, automation hooks.

1.1 1. Core & Shared Masters

1.1.1 Company

Field Name	Link Name	Type	Req.	Notes
Company Code	company_code	Single Line (Unique)	Y	Short code used across modules and exports
Legal Name	legal_name	Single Line	Y	Registered legal entity name
Trade Name	trade_name	Single Line		Optional doing-business-as name
GSTIN	gstn	Single Line	Y	GST registration; validate 15-character format
PAN	pan	Single Line		For TDS/TCS calculations
CIN	cin	Single Line		Corporate Identification Number
Registered Address	registered_address	Address	Y	Multi-line address
Billing Address	billing_address	Address	Y	Defaults on invoices
Contact Email	contact_email	Email		Finance escalation
Contact Phone	contact_phone	Phone		
Default Currency	default_currency	Dropdown	Y	Values maintained in system parameters
Books Export Flag	books_export_flag	Checkbox		Toggle for Tally integration
Active From	active_from	Date	Y	Effective start date
Active To	active_to	Date		Optional sunset
Notes	notes	Multi-line		Additional remarks

1.1.2 Warehouse

Field Name	Link Name	Type	Req.	Notes
Warehouse Code	warehouse_code	Single Line (Unique)	Y	Used in stock and logistics documents

Field Name	Link Name	Type	Req.	Notes
Company	company	Lookup (Company)	Y	Owning entity
Name	name	Single Line	Y	Display name
Warehouse Type	warehouse_type	Dropdown	Y	Head Office / Factory / Job Work Partner
Address	address	Address	Y	Physical location
City	city	Single Line	Y	
State	state	Dropdown	Y	For GST place of supply
Country	country	Dropdown	Y	
Pincode	pincode	Single Line	Y	
Geo Latitude	geo_latitude	Decimal	Y	Attendance geofence
Geo Longitude	geo_longitude	Decimal	Y	Attendance geofence
Time Zone	time_zone	Dropdown	Y	For SLA calculations
Default Currency	default_currency	Dropdown	Y	Inherits from company by default
Warehouse Coordinator (Office)	warehouse_coordin	Lookup (Stakeholder User)	C	Required for warehouses
Warehouse HR Coordinator	warehouse_hr_coor	Lookup (Stakeholder User)		Optional
Warehouse Manager(s)	warehouse_manage	Multi-select Lookup (Stakeholder User)		
Warehouse Coordinator(s)	warehouse_coordin	Multi-select Lookup (Stakeholder User)		
Warehouse Supervisor(s)	warehouse_supervi	Multi-select Lookup (Stakeholder User)		
Godown List	godown_list	Subform	Y	Contains godown level stock segregation
Active Flag	active_flag	Checkbox	Y	Deactivate to hide from new transactions
Notes	notes	Multi-line		

1.1.2.1 Godown (subform)

Field Name	Link Name	Type	Req.	Notes
Godown Code	godown_code	Single Line	Y	Unique within warehouse
Godown Name	godown_name	Single Line	Y	
Storage Condition	storage_condition	Dropdown		Ambient / Cold / Hazardous
Capacity UOM	capacity_uom	Dropdown		
Capacity Value	capacity_value	Decimal		Max storage
Batch Tracking Enabled	batch_tracking_enabled	Checkbox	Y	Controls batch-level location
Default QC Hold Area	default_qc_hold_area	Checkbox		Flags quarantine
Machinery List	machinery_list	Subform		Equipment housed in the godown

1.1.2.2 Machinery (Godown subform)

Field Name	Link Name	Type	Req.	Notes
Machine ID	machine_id	Single Line	Y	Unique equipment identifier
Machine Name	machine_name	Single Line	Y	
Category	category	Dropdown	Y	Capital Goods / Machine Spares / Production Line
Commission Date	commission_date	Date		
Maintenance Vendor	maintenance_vendor	Lookup (Vendor)		For service/job work
Next Service Due Status	next_service_due_status	Date Dropdown	Y	Active / Under Maintenance / Retired

1.1.3 Role Definition

Field Name	Link Name	Type	Req.	Notes
Role Code	role_code	Single Line	Y	Unique role identifier
Role Name	role_name	Single Line	Y	
Module Permissions	module_permissions	Multi-line JSON	Y	CRUD/approval rights per module
Data Scope	data_scope	Dropdown	Y	Global / Company / Warehouse

Field Name	Link Name	Type	Req.	Notes
Approval Levels	approval_levels	Subform		Specifies approvals handled
Default Share Rules	default_share_rules	Multi-line		Creator share settings template
Active Flag	active_flag	Checkbox	Y	

1.1.3.1 Approval Levels (subform)

Field Name	Link Name	Type	Req.	Notes
Module	module	Dropdown	Y	Purchase / Sales / Production / etc.
Stage	stage	Dropdown	Y	Request / Evaluation / Payment
Min Amount	min_amount	Currency		Threshold
Max Amount	max_amount	Currency		

1.1.4 Stakeholder User

Field Name	Link Name	Type	Req.	Notes
Portal User ID	portal_user_id	Single Line	Y	Zoho portal identifier
Employee Record	employee_record	Lookup (Staff Master)	Y	Links to staff
Primary Email	primary_email	Email	Y	
Mobile	mobile	Phone		
Assigned Roles	assigned_roles	Multi-select Lookup (Role Definition)	Y	Supports multi-role users
Default Warehouse	default_warehouse	Lookup (Warehouse)		
Warehouse Scope	warehouse_scope	Multi-select Lookup (Warehouse)		Overrides default
Status	status	Dropdown	Y	Active / Suspended
Last Accessed	last_accessed	Date-Time		
Notes	notes	Multi-line		

1.1.5 Staff Master (Employees & Staff)

Field Name	Link Name	Type	Req.	Notes
Staff ID	staff_id	Single Line (Unique)	Y	Official staff number
Staff Type	staff_type	Dropdown	Y	Employee (Stakeholder) / Staff
First Name	first_name	Single Line	Y	
Last Name	last_name	Single Line		
Gender	gender	Dropdown		
Date of Birth	date_of_birth	Date		
Company	company	Lookup (Company)	Y	Employer entity
Primary Location	primary_location	Lookup (Warehouse)	Y	For attendance
Department	department	Dropdown		
Designation	designation	Single Line	Y	
Employment Start Date	employment_start_c	Date	Y	
Employment End Date	employment_end_d	Date		
Employment Status	employment_status	Dropdown	Y	Active / On Leave / Resigned
HR Owner	hr_owner	Lookup (Stakeholder User)	Y	Controls approvals
Shift Assignment	shift_assignment	Lookup (Shift Definition)		Defaults attendance
Overtime Eligible	overtime_eligible	Checkbox		
Contractor Flag	contractor_flag	Checkbox		For wages via vendor
Contractor Vendor	contractor_vendor	Lookup (Vendor)	C	Mandatory if contractor flag checked
Bank Account	bank_account	Subform		Payment details
ID Proofs	id_proofs	Subform		Attachments
Face Template ID	face_template_id	Single Line	Y	External face recognition ID
Photo Reference	photo_reference	Image Upload	Y	Stored for 7 days
Contact Number	contact_number	Phone		
Emergency Contact	emergency_contact	Phone		
Address	address	Address		
Remarks	remarks	Multi-line		

1.1.5.1 Bank Account (subform)

Field	Link Name	Type	Req.	Notes
Account Holder	account_holder	Single Line	Y	
Bank Name	bank_name	Single Line	Y	
IFSC Code	ifsc_code	Single Line	Y	Validate format
Account Number	account_number	Single Line	Y	Mask display
Account Type	account_type	Dropdown		

1.1.5.2 ID Proofs (subform)

Field	Link Name	Type	Req.	Notes
Document Type	document_type	Dropdown	Y	Aadhaar / PAN / License / Other
Document Number	document_number	Single Line	Y	
Expiry Date	expiry_date	Date		
Attachment	attachment	File Upload	Y	

1.1.6 Product Master

Field Name	Link Name	Type	Req.	Notes
SKU Code	sku_code	Single Line (Unique)	Y	Cross-module identifier
Product Name	product_name	Single Line	Y	
Product Type	product_type	Dropdown	Y	Goods / Services
Goods Sub-Type	goods_sub_type	Dropdown	C	RAW_MATERIAL / PACKING_MATERIAL / FINISHED_GOOD / SEMI_FINISHED / TRADED_PRODUCTS / CAPITAL_GOOD / MACHINE_SPARES / CONSUMABLES
Service Sub-Type	service_sub_type	Dropdown	C	Warehouse Expense / Wages / Freight / Miscellaneous / Staff Welfare / Vehicle / Custom
Custom Service Category	custom_service_cat	Lookup (Service Catalogue)	C	For IT-admin defined services
Description	description	Multi-line		
Batch Tracking Required	batch_tracking_req	Checkbox	C	Required for goods
Shelf Life (Days)	shelf_life_days	Number		For expiry

Field Name	Link Name	Type	Req.	Notes
QC Responsibility	qc_responsibility	Dropdown		Warehouse Coordinator / QC Coordinator / QC Manager
QC Template	qc_template	Lookup (Template Library)		Default QC parameters
UOM	uom	Dropdown	Y	Base unit
Secondary UOMs	secondary_uoms	Subform		For conversions
Specific Gravity	specific_gravity	Decimal		Used for kg □ litre
Conversion Notes	conversion_notes	Multi-line		
Packing Material Default	packing_material_d	Lookup (Product)		Default packaging
Yield Tracking Required	yield_tracking_requi	Checkbox		
Yield Parameters	yield_parameters	Multi-select		Physical Qty / Purity % / AI Content
Wage Method	wage_method	Dropdown		Template Rate / Headcount / None
Freight Class	freight_class	Dropdown		Logistics reference
Active Flag	active_flag	Checkbox	Y	
Created By	created_by	Lookup (Stakeholder User)	Y	
Created Date	created_date	Date-Time	Y	
Last Modified By	last_modified_by	Lookup (Stakeholder User)		
Last Modified Date	last_modified_date	Date-Time		

1.1.6.1 Secondary UOMs (subform)

Field	Link Name	Type	Req.	Notes
To UOM	to_uom	Dropdown	Y	
Conversion Factor	conversion_factor	Decimal	Y	Base to secondary
Specific Gravity Override	specific_gravity_ovr	Decimal		Optional
Valid From	valid_from	Date		
Valid To	valid_to	Date		

1.1.7 Service Catalogue

Field	Link Name	Type	Req.	Notes
Service Code	service_code	Single Line	Y	
Name	name	Single Line	Y	
Category	category	Dropdown	Y	Warehouse Expense / Wages / Freight / Misc / Custom
Direction	direction	Dropdown	Y	Inbound / Outbound / Both
Default TDS %	default_tds	Decimal		
Default TCS %	default_tcs	Decimal		
Warehouse Availability	warehouse_availabi	Multi-select Lookup (Warehouse)		
Description	description	Multi-line		
Active Flag	active_flag	Checkbox	Y	

1.1.8 Vendor

Field	Link Name	Type	Req.	Notes
Vendor Code	vendor_code	Single Line	Y	
Vendor Name	vendor_name	Single Line	Y	
Vendor Type	vendor_type	Multi-select Dropdown	Y	Material / Service / Freight / Wages / Job Work / Contractor
Company	company	Lookup (Company)	Y	
GSTIN	gstn	Single Line	C	Mandatory if taxable
PAN	pan	Single Line	Y	
Address	address	Address	Y	
City	city	Single Line	Y	
State	state	Dropdown	Y	
Country	country	Dropdown	Y	
Pincode	pincode	Single Line	Y	
Contact Person	contact_person	Single Line		
Contact Email	contact_email	Email		
Contact Phone	contact_phone	Phone		
Payment Terms	payment_terms	Dropdown	Y	Net 15 / Net 30 / Custom
Custom Payment Days	custom_payment_d	Number	C	Mandatory when Payment Terms = Custom
Freight Terms	freight_terms	Dropdown	Y	Paid / To_Pay / Mixed
Freight Split Notes	freight_split_notes	Multi-line		

Field	Link Name	Type	Req.	Notes
Credit Limit	credit_limit	Currency		
Credit Days	credit_days	Number		
TDS Rate %	tds_rate	Decimal		
TCS Rate %	tcs_rate	Decimal		
Bank Details	bank_details	Subform		Multiple accounts
Preferred Transporters	preferred_transporters	Multi-select Lookup (Transporter)		
Allowed Warehouses	allowed_warehouse	Multi-select Lookup (Warehouse)		
Attachments	attachments	File Upload		Agreements
Active Flag	active_flag	Checkbox	Y	
Created Date	created_date	Date-Time	Y	

1.1.8.1 Vendor Bank Details (subform)

Field	Link Name	Type	Req.	Notes
Account Nickname	account_nickname	Single Line	Y	
Bank Name	bank_name	Single Line	Y	
Branch	branch	Single Line		
IFSC	ifsc	Single Line	Y	
Account Number	account_number	Single Line	Y	
Payment Method	payment_method	Dropdown		NEFT / RTGS / Cheque / UPI

1.1.9 Customer

Field	Link Name	Type	Req.	Notes
Customer Code	customer_code	Single Line	Y	
Customer Name	customer_name	Single Line	Y	
Company	company	Lookup (Company)	Y	
GSTIN	gstn	Single Line	C	Mandatory if taxable
PAN	pan	Single Line		
Billing Address	billing_address	Address	Y	
Shipping Addresses	shipping_addresses	Subform	Y	Supports multiple
Credit Terms	credit_terms	Dropdown	Y	Net 15 / Net 30 / Net 45 / Custom

Field	Link Name	Type	Req.	Notes
Custom Credit Days	custom_credit_days	Number	C	Mandatory when Credit Terms = Custom
Freight Terms	freight_terms	Dropdown	Y	Paid / To_Pay / Mixed
Freight Split Notes	freight_split_notes	Multi-line		
Allowed Price Lists	allowed_price_lists	Multi-select Lookup (Price List)	Y	
Default Warehouse	default_warehouse	Lookup (Warehouse)	Y	
Overdue Notification Recipients	overdue_notificatio	Multi-select Lookup (Stakeholder User)		
Contact Person	contact_person	Single Line		
Contact Email	contact_email	Email		
Contact Phone	contact_phone	Phone		
Documents	documents	File Upload		Contracts
Active Flag	active_flag	Checkbox	Y	

1.1.9.1 Shipping Address (subform)

Field	Link Name	Type	Req.	Notes
Address Label	address_label	Single Line	Y	
Address	address	Address	Y	
Delivery Region	delivery_region	Dropdown	Y	For price list mapping
Default Price List	default_price_list	Lookup (Price List)		Auto-selection
Contact Person	contact_person	Single Line		
Contact Phone	contact_phone	Phone		

1.1.10 Transporter

Field	Link Name	Type	Req.	Notes
Transporter Code	transporter_code	Single Line	Y	
Name	name	Single Line	Y	
GSTIN	gstn	Single Line		
Contact Person	contact_person	Single Line		
Contact Email	contact_email	Email		
Contact Phone	contact_phone	Phone		

Field	Link Name	Type	Req.	Notes
Freight Modes	freight_modes	Multi-select Dropdown	Y	Local Drayage / Linehaul
Coverage Routes	coverage_routes	Multi-line		
TDS Rate %	tds_rate	Decimal		
Payment Terms	payment_terms	Dropdown		
Rating	rating	Number (1-5)		
Documents	documents	File Upload		Insurance
Active Flag	active_flag	Checkbox	Y	

1.1.11 Price List

Field	Link Name	Type	Req.	Notes
Price List ID	price_list_id	Single Line	Y	
Company	company	Lookup (Company)	Y	
Customer	customer	Lookup (Customer)		Optional if customer-specific
Delivery Region	delivery_region	Dropdown		For auto-selection
Currency	currency	Dropdown	Y	
Effective From	effective_from	Date	Y	
Effective To	effective_to	Date		
Default Freight Terms	default_freight_term	Dropdown		Overrides customer
Status	status	Dropdown	Y	Draft / Active / Archived
Price Lines	price_lines	Subform	Y	Product level rates
Notes	notes	Multi-line		

1.1.11.1 Price Lines (subform)

Field	Link Name	Type	Req.	Notes
Product	product	Lookup (Product)	Y	
UOM	uom	Dropdown	Y	
Rate	rate	Currency	Y	
Discount %	discount	Decimal		
GST %	gst	Decimal	Y	
Freight Component	freight_component	Currency		Optional
Valid From	valid_from	Date		
Valid To	valid_to	Date		

1.1.12 Tax Master

Field	Link Name	Type	Req.	Notes
Tax Type	tax_type	Dropdown	Y	GST / TDS / TCS
Section Reference	section_reference	Single Line		
Rate %	rate	Decimal	Y	
Effective From	effective_from	Date	Y	
Effective To	effective_to	Date		
Applicable On	applicable_on	Multi-select Dropdown	Y	Product / Service / Freight / Wage
Threshold Amount	threshold_amount	Currency		
Company Scope	company_scope	Lookup (Company)	Y	
Notes	notes	Multi-line		

1.1.13 Template Library

Field	Link Name	Type	Req.	Notes
Template ID	template_id	Single Line	Y	
Template Type	template_type	Dropdown	Y	Production / QC Report / Job Work / Packing / Invoice
Name	name	Single Line	Y	
Warehouse Scope	warehouse_scope	Multi-select Lookup (Warehouse)	Y	
Revision No.	revision_no	Number	Y	Rev 1, Rev 2, etc.
Effective From	effective_from	Date	Y	
Effective To	effective_to	Date		
Layout JSON/XML	layout_json_xml	Multi-line	Y	Stores dynamic layout
Requires Digital Signature	requires_digital_sigr	Checkbox		
Created By	created_by	Lookup (Stakeholder User)	Y	
Approval Log	approval_log	Subform		
Status	status	Dropdown	Y	Draft / Active / Retired

1.1.13.1 Approval Log (subform)

Field	Link Name	Type	Req.	Notes
Approved By	approved_by	Lookup (Stakeholder User)	Y	
Approval Date	approval_date	Date-Time	Y	
Remarks	remarks	Multi-line		

1.2 2. Purchase Module

1.2.1 Purchase Request (PR)

Field	Link Name	Type	Req.	Notes
PR No.	pr_no	Auto Number	Y	
Request Date	request_date	Date	Y	
Warehouse	warehouse	Lookup (Warehouse)	Y	Visibility restricted
Godown	godown	Dropdown (filtered)	C	Required for stock items
Requested By	requested_by	Lookup (Stakeholder User)	Y	
Requestor Role	requestor_role	Dropdown	Y	Warehouse Manager / Coordinator
Requirement Type	requirement_type	Dropdown	Y	Goods / Services / Machinery
Lines	lines	Subform	Y	Detailed requirements
Priority	priority	Dropdown		Low / Medium / High
Required By Date	required_by_date	Date	C	Mandatory when Requirement Type = Goods
Justification	justification	Multi-line		
Attachments	attachments	File Upload		Specs, photos
Approval Status	approval_status	Dropdown	Y	Draft / Pending / Approved / Rejected / Partially Approved
Approval Trail	approval_trail	Subform		Audit
Visibility Scope	visibility_scope	Multi-select Lookup (Stakeholder User / Role)		Auto-share
Created From BOM Request	created_from_bom_	Lookup (BOM Request)		Traceability

Field	Link Name	Type	Req.	Notes
Notes	notes	Multi-line		

1.2.1.1 PR Lines (subform)

Field	Link Name	Type	Req.	Notes
Line No.	line_no	Number	Y	
Product/Service	product_service	Lookup (Product)	Y	
Description Override	description_override	Multi-line		
Quantity Requested	quantity_requested	Decimal	Y	
UOM	uom	Dropdown	Y	
Required Date	required_date	Date		
Purpose	purpose	Dropdown		Production / Maintenance / Consumable
Machine Reference	machine_reference	Lookup (Machine)		For spares/job work
Allow RFQ Skip	allow_rfq_skip	Checkbox		Requires approval
Attachments	attachments	File Upload		Photos
Status	status	Dropdown	Y	Pending / Approved / Rejected / Fulfilled
Approved Quantity	approved_quantity	Decimal		For partial approval

1.2.1.2 Approval Trail (subform)

Field	Link Name	Type	Req.	Notes
Action	action	Dropdown	Y	Approved / Rejected / Partial
Actor	actor	Lookup (Stakeholder User)	Y	
Action Date	action_date	Date-Time	Y	
Remarks	remarks	Multi-line		

1.2.2 RFQ Header

Field	Link Name	Type	Req.	Notes
RFQ No.	rfq_no	Auto Number	Y	

Field	Link Name	Type	Req.	Notes
Linked PRs	linked_prs	Multi-select Lookup (Purchase Request)	Y	
Created By	created_by	Lookup (Stakeholder User)	Y	
Creation Date	creation_date	Date	Y	
RFQ Mode	rfq_mode	Dropdown	Y	Email / Portal / Phone
RFQ Documents	rfq_documents	File Upload		Specs
RFQ Status	rfq_status	Dropdown	Y	Open / Closed / Cancelled
Quote Count Expected	quote_count_expec	Number		Typically 3
Skip RFQ Flag	skip_rfq_flag	Checkbox		Requires purchase manager approval
Skip RFQ Justification	skip_rfq_justificatio	Multi-line	C	Mandatory when skip flag = true
Purchase Manager Approval	purchase_manager_	Lookup (Stakeholder User)		
Approval Attachment	approval_attachmer	File Upload		
Dispatch ETA Updates	dispatch_eta_updat	Subform		Anticipated arrival

1.2.2.1 Dispatch ETA Updates (subform)

Field	Link Name	Type	Req.	Notes
Update Date	update_date	Date-Time	Y	
Updated By	updated_by	Lookup (Stakeholder User)	Y	
Expected Arrival	expected_arrival	Date	Y	
Remarks	remarks	Multi-line		

1.2.3 Quote Response

Field	Link Name	Type	Req.	Notes
Quote ID	quote_id	Auto Number	Y	
RFQ	rfq	Lookup (RFQ Header)	Y	

Field	Link Name	Type	Req.	Notes
Vendor	vendor	Lookup (Vendor)	Y	
Quote Date	quote_date	Date	Y	
Price Valid Till	price_valid_till	Date		
Currency	currency	Dropdown	Y	
Quote Lines	quote_lines	Subform	Y	
Freight Terms	freight_terms	Dropdown	Y	Paid / To_Pay / Mixed
Payment Terms	payment_terms	Dropdown	Y	Inherit from vendor but editable
Delivery Terms	delivery_terms	Multi-line		
Lead Time (Days)	lead_time_days	Number		
Attachments	attachments	File Upload		Vendor quote
Remarks	remarks	Multi-line		
Evaluation Score	evaluation_score	Decimal		Computed
Chosen Flag	chosen_flag	Checkbox		

1.2.3.1 Quote Lines (subform)

Field	Link Name	Type	Req.	Notes
PR Line	pr_line	Lookup (PR Line)	Y	
Product/Service	product_service	Lookup (Product)	Y	
Specification	specification	Multi-line		
Quantity Offered	quantity_offered	Decimal	Y	
UOM	uom	Dropdown	Y	
Unit Price	unit_price	Currency	Y	
Discount %	discount	Decimal		
GST %	gst	Decimal	Y	
Freight Charge	freight_charge	Currency		
Delivery Timeline	delivery_timeline	Number		Days

1.2.4 Quote Evaluation

Field	Link Name	Type	Req.	Notes
Evaluation ID	evaluation_id	Auto Number	Y	
RFQ	rfq	Lookup (RFQ Header)	Y	
Evaluation Date	evaluation_date	Date	Y	

Field	Link Name	Type	Req.	Notes
Evaluated By	evaluated_by	Lookup (Stakeholder User)	Y	
Comparison Table	comparison_table	Subform	Y	Vendor comparisons
Best Quote Flag	best_quote_flag	Checkbox		
Recommended Vendor	recommended_vendor	Lookup (Vendor)		
Justification Notes	justification_notes	Multi-line	C	Mandatory when best quote not chosen
Approval Status	approval_status	Dropdown	Y	Pending / Approved / Rejected
Approval Trail	approval_trail	Subform		Purchase Manager approval

1.2.4.1 Comparison Table (subform)

Field	Link Name	Type	Req.	Notes
Vendor	vendor	Lookup (Vendor)	Y	
Total Cost	total_cost	Currency	Y	Sum of lines
Lead Time	lead_time	Number		
Freight Terms	freight_terms	Dropdown		
Payment Terms	payment_terms	Dropdown		
Score	score	Decimal		Weighted
Remarks	remarks	Multi-line		

1.2.5 Purchase Order (PO)

Field	Link Name	Type	Req.	Notes
PO No.	po_no	Auto Number	Y	
Revision No.	revision_no	Number	Y	Rev 0 default
Vendor	vendor	Lookup (Vendor)	Y	
Company	company	Lookup (Company)	Y	
Warehouse	warehouse	Lookup (Warehouse)	Y	
Linked PRs	linked_prs	Multi-select Lookup (Purchase Request)	Y	

Field	Link Name	Type	Req.	Notes
Linked RFQ	linked_rfq	Lookup (RFQ Header)		
PO Date	po_date	Date	Y	
Expected Delivery Start	expected_delivery_start	Date		
Expected Delivery End	expected_delivery_end	Date		
Freight Terms	freight_terms	Dropdown	Y	
Payment Terms	payment_terms	Dropdown	Y	
Currency	currency	Dropdown	Y	
PO Lines	po_lines	Subform	Y	
Attachments	attachments	File Upload		Signed PO
Terms & Conditions	terms_and_conditions	Multi-line		
Approval Trail	approval_trail	Subform		
Status	status	Dropdown	Y	Draft / Approved / Issued / Closed / Cancelled
Partial Receipt Flag	partial_receipt_flag	Checkbox		

1.2.5.1 PO Lines (subform)

Field	Link Name	Type	Req.	Notes
Line No.	line_no	Number	Y	
Product/Service	product_service	Lookup (Product)	Y	
Description	description	Multi-line		
Quantity Ordered	quantity_ordered	Decimal	Y	
UOM	uom	Dropdown	Y	
Unit Price	unit_price	Currency	Y	
Discount %	discount	Decimal		
GST %	gst	Decimal	Y	
Extra Commission	extra_commission	Currency		Applied for select products; included in landed cost
Agent Commission	agent_commission	Currency		Commission payable to external agents; included in landed cost
Freight Estimate	freight_estimate	Currency		Tentative freight
Delivery Schedule	delivery_schedule	Date		
Linked PR Line	linked_pr_line	Lookup (PR Line)		

Field	Link Name	Type	Req.	Notes
Linked RFQ Line	linked_rfq_line	Lookup (Quote Line)		
Batch Requirement Notes	batch_requirement_	Multi-line		

1.2.6 PO ETA Update (Anticipated Arrival)

Field	Link Name	Type	Req.	Notes
Update ID	update_id	Auto Number	Y	
PO	po	Lookup (Purchase Order)	Y	
Update Date	update_date	Date-Time	Y	
Updated By	updated_by	Lookup (Stakeholder User)	Y	Purchase Coordinator or Warehouse Coordinator
Expected Arrival Date	expected_arrival_date	Date	Y	
Status	status	Dropdown	Y	Pending / Updated
Remarks	remarks	Multi-line		

1.2.7 Receipt Advice (Inbound)

Field	Link Name	Type	Req.	Notes
Receipt Advice No.	receipt_advice_no	Auto Number	Y	
Receipt Date	receipt_date	Date	Y	
Warehouse	warehouse	Lookup (Warehouse)	Y	
Godown	godown	Dropdown	Y	
Vendor	vendor	Lookup (Vendor)	Y	
Linked PO(s)	linked_pos	Multi-select Lookup (Purchase Order)	Y	
Vehicle Number	vehicle_number	Single Line		
Driver Name	driver_name	Single Line		
Invoice Upload	invoice_upload	File Upload	Y	Vendor invoice
Packing List Upload	packing_list_upload	File Upload		
Receipt Lines	receipt_lines	Subform	Y	Products received

Field	Link Name	Type	Req.	Notes
Packing Material Lines	packing_material_lir	Subform		Packaging capture
Freight Details	freight_details	Subform		Local/Linehaul
Loading Unloading Wages	loading_unloading_	Subform		
QC Routing	qc_routing	Dropdown	Y	Warehouse / QC Coordinator / QC Manager
QC Status	qc_status	Dropdown	Y	Pending / Pass / Fail / Hold
Partial Receipt Flag	partial_receipt_flag	Checkbox		
Remarks	remarks	Multi-line		
Created By	created_by	Lookup (Stakeholder User)	Y	
Created Time	created_time	Date-Time	Y	

1.2.7.1 Receipt Lines (subform)

Field	Link Name	Type	Req.	Notes
Line No.	line_no	Number	Y	
PO Line	po_line	Lookup (PO Line)	Y	
Product	product	Lookup (Product)	Y	
Batch No.	batch_no	Single Line	C	Mandatory when batch tracking enabled
Expiry Date	expiry_date	Date		
Quantity Received	quantity_received	Decimal	Y	
UOM	uom	Dropdown	Y	
Extra Commission	extra_commission	Currency		Capture actual commission incurred
Agent Commission	agent_commission	Currency		Capture agent payouts associated with the receipt
Quantity Accepted	quantity_accepted	Decimal		Post QC
Quantity Rejected	quantity_rejected	Decimal		
Godown Location	godown_location	Dropdown	Y	Filters by warehouse
Remarks	remarks	Multi-line		

1.2.7.2 Packing Material Lines (subform)

Field	Link Name	Type	Req.	Notes
Packaging SKU	packaging_sku	Lookup (Product)	Y	Must be PACKING_MATERIAL
Quantity	quantity	Decimal	Y	
UOM	uom	Dropdown	Y	New / Damaged
Condition	condition	Dropdown		

1.2.7.3 Freight Details (subform)

Field	Link Name	Type	Req.	Notes
Freight Type	freight_type	Dropdown	Y	Local Drayage / Linehaul
Transporter	transporter	Lookup (Transporter)	C	Required when company pays
Freight Terms	freight_terms	Dropdown	Y	Paid / To_Pay / Mixed
Tentative Charge	tentative_charge	Currency		Pre-filled from PO
Discount	discount	Currency		Optional
Payable By	payable_by	Dropdown	Y	Company / Vendor
Quantity Basis	quantity_basis	Decimal		Total shipment quantity for cost-per-unit reporting
Quantity UOM	quantity_uom	Dropdown		Tonnes / KG / KL / Units
Destination State	destination_state	Dropdown		Auto-populated from receiving warehouse
Cost Per Unit (Calc)	cost_per_unit_calc	Decimal (Formula)		Tentative charge minus discount divided by quantity basis
Payment Schedule	payment_schedule	Subform		Instalments

1.2.7.4 Loading Unloading Wages (subform)

Field	Link Name	Type	Req.	Notes
Wage Type	wage_type	Dropdown	Y	Loading / Unloading
Contractor Vendor	contractor_vendor	Lookup (Vendor)	C	Mandatory if payable by company
Amount	amount	Currency	Y	Includes product value plus extra/agent commissions when applicable

Field	Link Name	Type	Req.	Notes
TDS Applicable %	tds_applicable	Decimal		
Payable By	payable_by	Dropdown	Y	Company / Vendor
Remarks	remarks	Multi-line		

1.2.7.5 Payment Schedule (nested subform)

Field	Link Name	Type	Req.	Notes
Due Date	due_date	Date	Y	
Amount	amount	Currency	Y	
TDS %	tds	Decimal		
Reminder Flag	reminder_flag	Checkbox		Triggers auto reminders

1.2.8 Freight Advice (Inbound)

Field	Link Name	Type	Req.	Notes
Advice No.	advice_no	Auto Number	Y	
Direction	direction	Dropdown	Y	Inbound
Receipt Advice	receipt_advice	Lookup (Receipt Advice)	Y	
Transporter	transporter	Lookup (Transporter)	Y	
Freight Type	freight_type	Dropdown	Y	Local Drayage / Linehaul
Created By	created_by	Lookup (Stakeholder User)	Y	Freight Coordinator originator
Created Date	created_date	Date	Y	
Base Amount	base_amount	Currency	Y	
Discount	discount	Currency		
Loading Wages Amount	loading_wages_am	Currency		
Unloading Wages Amount	unloading_wages_a	Currency		
Quantity Basis	quantity_basis	Decimal		Total quantity covered by the advice
Quantity UOM	quantity_uom	Dropdown		Tonnes / KG / KL / Units

Field	Link Name	Type	Req.	Notes
Cost Per Unit (Calc)	cost_per_unit_calc	Decimal (Formula)		Payable amount divided by quantity basis
Destination State	destination_state	Dropdown		Auto-derived from receiving warehouse
Payable Amount	payable_amount	Currency	Y	Base - discount + wages
Payment Schedule	payment_schedule	Subform		
Approval Workflow	approval_workflow	Subform		Freight Coordinator □ Finance Manager
Status	status	Dropdown	Y	Draft / Pending Approval / Approved / Paid

1.2.9 Vendor Payment Advice

Field	Link Name	Type	Req.	Notes
Advice No.	advice_no	Auto Number	Y	
Vendor	vendor	Lookup (Vendor)	Y	
Source Document Type	source_document_t	Dropdown	Y	PO / Receipt / Freight / Wage / Credit Note
Source Document	source_document	Lookup (Varies)	Y	Dynamic lookup
Amount	amount	Currency	Y	
Tax Components	tax_components	Subform		TDS/TCS
Due Date	due_date	Date	Y	
Payment Method	payment_method	Dropdown	Y	Bank Transfer / Cash / Cheque / UPI
Prepared By	prepared_by	Lookup (Stakeholder User)	Y	Warehouse Coordinator (Office) originator
Approval Workflow	approval_workflow	Subform	Y	Finance Manager □ Office Manager
Status	status	Dropdown	Y	Draft / Pending / Approved / Paid / On Hold
Notes	notes	Multi-line		

1.2.9.1 Tax Components (subform)

Field	Link Name	Type	Req.	Notes
Tax Type	tax_type	Dropdown	Y	TDS / TCS
Rate %	rate	Decimal	Y	
Amount	amount	Currency	Y	

1.3 3. Sales Module

1.3.1 Customer PO Upload

Field	Link Name	Type	Req.	Notes
Upload ID	upload_id	Auto Number	Y	
Customer	customer	Lookup (Customer)	Y	
Upload Date	upload_date	Date-Time	Y	
PO File	po_file	File Upload	Y	PDF
AI Parser Confidence	ai_parser_confidenc	Decimal	Y	
Parsed PO Number	parsed_po_number	Single Line		
Parsed PO Date	parsed_po_date	Date		
Delivery Location	delivery_location	Dropdown		Suggest price list
Parsed Lines	parsed_lines	Subform		Output of parser
Manual Review Required	manual_review_req	Checkbox		Auto checked if confidence < threshold
Review Comments Status	review_comments status	Multi-line Dropdown	Y	Uploaded / Parsed / Converted / Archived
Linked Sales Order	linked_sales_order	Lookup (Sales Order)		

1.3.1.1 Parsed Lines (subform)

Field	Link Name	Type	Req.	Notes
Product Description	product_descriptior	Single Line		
Quantity	quantity	Decimal		
UOM	uom	Dropdown		
Price	price	Currency		
Parsed SKU	parsed_sku	Lookup (Product)		Auto-mapped
Confidence %	confidence	Decimal		

1.3.2 Sales Order (SO)

Field	Link Name	Type	Req.	Notes
SO No.	so_no	Auto Number	Y	
Customer	customer	Lookup (Customer)	Y	
Company	company	Lookup (Company)	Y	
Warehouse	warehouse	Lookup (Warehouse)	Y	
Price List	price_list	Lookup (Price List)	Y	Filter by customer
Credit Terms	credit_terms	Dropdown	Y	Inherit from customer
Freight Terms	freight_terms	Dropdown	Y	
Customer PO Reference	customer_po_refere	Lookup (Customer PO Upload)		
SO Date	so_date	Date	Y	
Required Ship Date	required_ship_date	Date		
Lines	lines	Subform	Y	
Remarks	remarks	Multi-line		
Approval Status	approval_status	Dropdown	Y	Draft / Pending / Approved / Rejected
Approved By	approved_by	Lookup (Stakeholder User)		
Approval Date	approval_date	Date-Time		
Assigned Warehouse Stakeholders	assigned_warehous	Multi-select Lookup (Stakeholder User)		Auto-share

1.3.2.1 SO Lines (subform)

Field	Link Name	Type	Req.	Notes
Line No.	line_no	Number	Y	
Product	product	Lookup (Product)	Y	Must exist in price list
Batch Preference	batch_preference	Single Line		
Quantity Ordered	quantity_ordered	Decimal	Y	
UOM	uom	Dropdown	Y	
Unit Price	unit_price	Currency	Y	From price list
Discount %	discount	Decimal		

Field	Link Name	Type	Req.	Notes
GST %	gst	Decimal	Y	
Delivery Schedule Date	delivery_schedule_c	Date		
Remarks	remarks	Multi-line		
Reserved Qty	reserved_qty	Decimal		Updated at dispatch

1.3.3 Dispatch Challan (DC)

Field	Link Name	Type	Req.	Notes
DC No.	dc_no	Auto Number	Y	
Warehouse	warehouse	Lookup (Warehouse)	Y	
Dispatch Date	dispatch_date	Date	Y	
Transporter	transporter	Lookup (Transporter)		
Freight Rate Type	freight_rate_type	Dropdown		Per km / Flat
Freight Rate Value	freight_rate_value	Currency		
Freight Amount Total	freight_amount_total	Currency		
Lorry No.	lorry_no	Single Line		
Driver Contact	driver_contact	Phone		
Linked SO Lines	linked_so_lines	Multi-select Lookup (SO Line)	Y	
DC Lines	dc_lines	Subform	Y	Consolidated products
Delivery Locations	delivery_locations	Subform		For multi-drop
Documents	documents	File Upload		DC PDF
Status	status	Dropdown	Y	Draft / Released / Delivered / Closed
Created By	created_by	Lookup (Stakeholder User)	Y	
Freight Advice Link	freight_advice_link	Lookup (Freight Advice)		Outbound

1.3.3.1 DC Lines (subform)

Field	Link Name	Type	Req.	Notes
Product	product	Lookup (Product)	Y	
Batch	batch	Single Line	C	Required if batch tracking
Quantity Dispatched	quantity_dispatched	Decimal	Y	
UOM	uom	Dropdown	Y	
Linked SO Line	linked_so_line	Lookup (SO Line)	Y	
Weight	weight	Decimal		Optional for weighment

1.3.3.2 Delivery Locations (subform)

Field	Link Name	Type	Req.	Notes
Sequence	sequence	Number	Y	
Shipping Address	shipping_address	Lookup (Customer Shipping Address)	Y	
Quantity for Location	quantity_for_location	Decimal	Y	
Estimated Arrival	estimated_arrival	Date		

1.3.4 Sales Invoice Check

Field	Link Name	Type	Req.	Notes
Invoice Check ID	invoice_check_id	Auto Number	Y	
DC Reference	dc_reference	Lookup (Dispatch Challan)	Y	
Statutory Invoice Upload	statutory_invoice_upload	File Upload	Y	External invoice
Invoice Number	invoice_number	Single Line	Y	
Invoice Date	invoice_date	Date	Y	
Total Value (Upload)	total_value_upload	Currency	Y	Parsed
Total Value (SO)	total_value_so	Currency	Y	Computed
Variance Amount	variance_amount	Currency	Y	
Variance Flag	variance_flag	Dropdown	Y	Within Tolerance / Requires Review
Remarks	remarks	Multi-line		

Field	Link Name	Type	Req.	Notes
Acceptance Timestamp	acceptance_timestamp	Date-Time		
Accepted By	accepted_by	Lookup (Stakeholder User)		

1.3.5 Freight Advice (Outbound)

Field	Link Name	Type	Req.	Notes
Advice No.	advice_no	Auto Number	Y	
Direction	direction	Dropdown	Y	Outbound
Dispatch Challan	dispatch_challan	Lookup (Dispatch Challan)	Y	
Transporter	transporter	Lookup (Transporter)	Y	
Freight Type	freight_type	Dropdown	Y	Local Drayage / Linehaul
Created By	created_by	Lookup (Stakeholder User)	Y	Freight Coordinator originator
Created Date	created_date	Date	Y	
Base Amount	base_amount	Currency	Y	
Discount	discount	Currency		
Loading Wages Amount	loading_wages_amount	Currency		
Unloading Wages Amount	unloading_wages_amount	Currency		
Shipment Quantity	shipment_quantity	Decimal		Total quantity dispatched
Quantity UOM	quantity_uom	Dropdown		Tonnes / KG / KL / Units
Cost Per Unit (Calc)	cost_per_unit_calc	Decimal (Formula)		Payable amount divided by shipment quantity
Destination State	destination_state	Dropdown		Auto-populated from delivery address
Payable Amount	payable_amount	Currency	Y	
Payment Schedule	payment_schedule	Subform		
Approval Workflow	approval_workflow	Subform		Freight Coordinator □ Finance Manager

Field	Link Name	Type	Req.	Notes
Status	status	Dropdown	Y	Draft / Pending Approval / Approved / Paid

1.3.6 Receivable Ledger

Field	Link Name	Type	Req.	Notes
Ledger ID	ledger_id	Auto Number	Y	
Customer	customer	Lookup (Customer)	Y	
Invoice Reference	invoice_reference	Lookup (Sales Invoice Check)	Y	
Invoice Date	invoice_date	Date	Y	
Due Date	due_date	Date	Y	
Amount	amount	Currency	Y	
Amount Paid	amount_paid	Currency		
Balance	balance	Currency	Y	
Payment Status	payment_status	Dropdown	Y	Not Due / Partially Paid / Paid / Overdue
Reminder Dates	reminder_dates	Subform		Auto reminders
Escalation Flag	escalation_flag	Checkbox		Trigger after 2 weeks
Notes	notes	Multi-line		

1.3.6.1 Reminder Dates (subform)

Field	Link Name	Type	Req.	Notes
Reminder Date	reminder_date	Date	Y	
Reminder Sent By	reminder_sent_by	Lookup (Stakeholder User)		
Reminder Method	reminder_method	Dropdown		Email / Call

1.4 4. Production Module

1.4.1 BOM Request

Field	Link Name	Type	Req.	Notes
Request No.	request_no	Auto Number	Y	
Request Date	request_date	Date	Y	

Field	Link Name	Type	Req.	Notes
Warehouse	warehouse	Lookup (Warehouse)	Y	
Requested By	requested_by	Lookup (Stakeholder User)	Y	Warehouse Coordinator
Production Template	production_templat	Lookup (Template Library)	Y	
Output Product	output_product	Lookup (Product)	Y	
Output Quantity	output_quantity	Decimal	Y	
Required Completion Date	required_completion	Date		
Auto-calculated Inputs	auto_calculated_inp	Subform	Y	Computed from template
Shortfall Summary	shortfall_summary	Multi-line		
Approval Status	approval_status	Dropdown	Y	Draft / Pending / Approved / Rejected
Approved By	approved_by	Lookup (Stakeholder User)		
Approved Date	approved_date	Date-Time		
Excel Export Link	excel_export_link	URL		Download BOM
Notes	notes	Multi-line		

1.4.1.1 Auto-calculated Inputs (subform)

Field	Link Name	Type	Req.	Notes
Product	product	Lookup (Product)	Y	
Required Qty	required_qty	Decimal	Y	
Available Qty	available_qty	Decimal	Y	From stock
Shortfall Qty	shortfall_qty	Decimal	Y	Negative allowed
Purpose	purpose	Dropdown	Y	RM / PM / Wage

1.4.2 Material Issue

Field	Link Name	Type	Req.	Notes
Issue No.	issue_no	Auto Number	Y	
Issue Date	issue_date	Date	Y	

Field	Link Name	Type	Req.	Notes
Warehouse	warehouse	Lookup (Warehouse)	Y	
Work Order	work_order	Lookup (Work Order)	Y	
Issued By	issued_by	Lookup (Stakeholder User)	Y	
Approved By	approved_by	Lookup (Stakeholder User)		
Issue Lines	issue_lines	Subform	Y	
Remarks	remarks	Multi-line		

1.4.2.1 Issue Lines (subform)

Field	Link Name	Type	Req.	Notes
Product	product	Lookup (Product)	Y	
Batch Out	batch_out	Single Line	C	Required when batch tracking
Godown	godown	Dropdown	Y	
Quantity Issued	quantity_issued	Decimal	Y	
UOM	uom	Dropdown	Y	
Reserved for Template	reserved_for_template	Checkbox		Packing material reservation

1.4.3 Work Order / Production Batch

Field	Link Name	Type	Req.	Notes
Batch ID	batch_id	Auto Number	Y	
Work Order No.	work_order_no	Single Line	Y	Display
Warehouse	warehouse	Lookup (Warehouse)	Y	
Production Template	production_template	Lookup (Template Library)	Y	Includes revision
Template Revision	template_revision	Number	Y	
Linked Sales Order	linked_sales_order	Lookup (Sales Order)		
Linked Dispatch Challan	linked_dispatch_challan	Lookup (Dispatch Challan)		

Field	Link Name	Type	Req.	Notes
Planned Start Date	planned_start_date	Date	Y	
Planned End Date	planned_end_date	Date		
Actual Start Date	actual_start_date	Date		
Actual End Date	actual_end_date	Date		
Stage Status	stage_status	Dropdown	Y	Material Issue / Mixing / Packing / QC / Closed
Input Consumption	input_consumption	Subform	Y	Actual usage
Output Products	output_products	Subform	Y	Manufactured goods
Damage Report	damage_report	Subform		Damage / scrap
QC Request	qc_request	Lookup (QC Request)		
Wage Method	wage_method	Dropdown		Template Rate / Headcount
Wage Vouchers	wage_vouchers	Subform		Linked vouchers
Yield Log Reference	yield_log_reference	Lookup (Production Yield Log)		
Rework Flag	rework_flag	Checkbox		For reformulation
Parent Batch	parent_batch	Lookup (Work Order)		For rework linkage
Notes	notes	Multi-line		

1.4.3.1 Input Consumption (subform)

Field	Link Name	Type	Req.	Notes
Product	product	Lookup (Product)	Y	
Planned Qty	planned_qty	Decimal	Y	From template
Actual Qty	actual_qty	Decimal	Y	
UOM	uom	Dropdown	Y	
Batch Used	batch_used	Single Line	C	
Godown	godown	Dropdown	Y	
Yield Loss %	yield_loss	Decimal		Capture deviations

1.4.3.2 Output Products (subform)

Field	Link Name	Type	Req.	Notes
Product	product	Lookup (Product)	Y	
Batch ID	batch_id	Single Line	Y	Auto-generated

Field	Link Name	Type	Req.	Notes
Quantity Produced	quantity_produced	Decimal	Y	
UOM	uom	Dropdown	Y	
Purity %	purity	Decimal	C	Required when yield tracking includes purity
AI Content	ai_content	Decimal	C	Required when tracked
QC Status	qc_status	Dropdown	Y	Pending / Pass / Fail / Hold

1.4.3.3 Damage Report (subform)

Field	Link Name	Type	Req.	Notes
Stage	stage	Dropdown	Y	Mixing / Packing / QC
Description	description	Multi-line	Y	
Quantity Lost	quantity_lost	Decimal		
UOM	uom	Dropdown		
Handling Action	handling_action	Dropdown		Scrap / Rework

1.4.3.4 Wage Vouchers (subform)

Field	Link Name	Type	Req.	Notes
Wage Voucher	wage_voucher	Lookup (Wage Voucher)	Y	
Amount	amount	Currency	Y	

1.4.4 Wage Voucher (Production)

Field	Link Name	Type	Req.	Notes
Voucher No.	voucher_no	Auto Number	Y	
Work Order	work_order	Lookup (Work Order)	Y	
Wage Type	wage_type	Dropdown	Y	Template Rate / Headcount
Contractor Vendor	contractor_vendor	Lookup (Vendor)	C	Mandatory for contractor
Staff Group	staff_group	Multi-select Lookup (Staff)	C	Mandatory for headcount
Hours / Tasks	hours_tasks	Subform	Y	
Amount	amount	Currency	Y	

Field	Link Name	Type	Req.	Notes
TDS %	tds	Decimal		
Prepared By	prepared_by	Lookup (Stakeholder User)	Y	Warehouse Coordinator (Office) originator
Prepared Date	prepared_date	Date	Y	
Approval Workflow	approval_workflow	Subform	Y	Warehouse Coordinator (Office) □ Finance Manager
Status	status	Dropdown	Y	Draft / Pending / Approved / Paid
Remarks	remarks	Multi-line		

1.4.4.1 Hours / Tasks (subform)

Field	Link Name	Type	Req.	Notes
Staff	staff	Lookup (Staff)		Required for headcount
Task Description	task_description	Multi-line	Y	
Hours Worked	hours_worked	Decimal		
Quantity Produced	quantity_produced	Decimal		For incentive

1.4.5 Production Yield Log

Field	Link Name	Type	Req.	Notes
Log ID	log_id	Auto Number	Y	
Work Order	work_order	Lookup (Work Order)	Y	
Product	product	Lookup (Product)	Y	
Planned Yield %	planned_yield	Decimal		
Actual Output Qty	actual_output_qty	Decimal	Y	
Purity %	purity	Decimal	C	
AI Content	ai_content	Decimal	C	
Variance %	variance	Decimal	Y	
Remarks	remarks	Multi-line		
Report Date	report_date	Date	Y	

1.5 5. Quality Control Module

1.5.1 QC Parameter Library

Field	Link Name	Type	Req.	Notes
Parameter Code	parameter_code	Single Line	Y	
Parameter Name	parameter_name	Single Line	Y	
Unit	unit	Single Line		
Applicable Template	applicable_template	Lookup (Template Library)		
Applicable Product	applicable_product	Lookup (Product)		
Acceptable Min	acceptable_min	Decimal		
Acceptable Max	acceptable_max	Decimal		
Critical Flag	critical_flag	Checkbox		
Notes	notes	Multi-line		

1.5.2 QC Request

Field	Link Name	Type	Req.	Notes
Request No.	request_no	Auto Number	Y	
Request Date	request_date	Date	Y	
Requested By	requested_by	Lookup (Stakeholder User)	Y	Warehouse roles
Requestor Role	requestor_role	Dropdown	Y	Warehouse Supervisor / Coordinator / Manager
Warehouse	warehouse	Lookup (Warehouse)	Y	
Product	product	Lookup (Product)	Y	
Batch	batch	Single Line	C	
Stage	stage	Dropdown	Y	Receipt / In-Process / Finished / Sales Return
QC Template	qc_template	Lookup (Template Library)	Y	
Selected Parameters	selected_parameter	Subform		Optional overrides
Sample Photo	sample_photo	Image Upload	Y	
Sample Qty	sample_qty	Decimal		
Priority	priority	Dropdown		Normal / Urgent
Remarks	remarks	Multi-line		

Field	Link Name	Type	Req.	Notes
Status	status	Dropdown	Y	Requested / In Progress / Completed Generated by coordinator
Lab Code	lab_code	Single Line		
Counter Sample Required	counter_sample_rec	Checkbox		

1.5.2.1 Selected Parameters (subform)

Field	Link Name	Type	Req.	Notes
Parameter	parameter	Lookup (QC Parameter Library)	Y	
Override Range Min	override_range_min	Decimal		
Override Range Max	override_range_max	Decimal		
Notes	notes	Multi-line		

1.5.3 QC Lab Job

Field	Link Name	Type	Req.	Notes
Job No.	job_no	Auto Number	Y	
QC Request	qc_request	Lookup (QC Request)	Y	
Analyst	analyst	Lookup (Stakeholder User)	Y	
Assigned Parameters	assigned_parameters	Subform	Y	
Sample Received Date	sample_received_date	Date	Y	
Results Attachment	results_attachment	File Upload		Raw data
Comments	comments	Multi-line		
Status	status	Dropdown	Y	Assigned / In Progress / Completed

1.5.3.1 Assigned Parameters (subform)

Field	Link Name	Type	Req.	Notes
Parameter	parameter	Lookup (QC Parameter Library)	Y	
Result Value	result_value	Decimal		
Result Text	result_text	Multi-line		
Result Photo	result_photo	Image Upload		
Pass/Fail	pass_fail	Dropdown		

1.5.4 QC Final Report

Field	Link Name	Type	Req.	Notes
Report No.	report_no	Auto Number	Y	
QC Request	qc_request	Lookup (QC Request)	Y	
Template Revision	template_revision	Number	Y	
Prepared By	prepared_by	Lookup (Stakeholder User)	Y	Coordinator or Manager
Prepared Date	prepared_date	Date	Y	
Overall Result	overall_result	Dropdown	Y	Pass / Fail / Rework
Remarks	remarks	Multi-line		
Digital Signature	digital_signature	File Upload	C	Required if template demands
Distribution List	distribution_list	Multi-select Lookup (Stakeholder User)		
Attachments	attachments	File Upload		Final COA

1.5.5 Counter Sample Register

Field	Link Name	Type	Req.	Notes
Sample ID	sample_id	Auto Number	Y	
QC Request	qc_request	Lookup (QC Request)	Y	
Storage Location	storage_location	Dropdown	Y	Warehouse / QC Lab
Shelf	shelf	Single Line		
Bin	bin	Single Line		
Issued To	issued_to	Lookup (Stakeholder User)		

Field	Link Name	Type	Req.	Notes
Issue Date	issue_date	Date		
Expected Return Date	expected_return_date	Date		
Actual Return Date	actual_return_date	Date		
Reminder Sent	reminder_sent	Checkbox		Auto-reminder
Disposal Date	disposal_date	Date		
Disposal Approved By	disposal_approved_by	Lookup (Stakeholder User)		

1.6 6. Inventory, Logistics & Returns

1.6.1 Inventory Ledger

Field	Link Name	Type	Req.	Notes
Ledger Entry ID	ledger_entry_id	Auto Number	Y	
Transaction Date	transaction_date	Date	Y	
Warehouse	warehouse	Lookup (Warehouse)	Y	
Godown	godown	Dropdown	Y	
Product	product	Lookup (Product)	Y	
Batch	batch	Single Line		
Quantity In	quantity_in	Decimal		
Quantity Out	quantity_out	Decimal		
UOM	uom	Dropdown	Y	
Transaction Type	transaction_type	Dropdown	Y	Receipt / Issue / Transfer / Adjustment / Dispatch
Source Document	source_document	Lookup (Varies)	Y	
Cost	cost	Currency		
Status	status	Dropdown	Y	Available / In Transit / Reserved
FIFO Layer ID	fifo_layer_id	Single Line		Valuation
Remarks	remarks	Multi-line		

1.6.2 Stock Transfer DC

Field	Link Name	Type	Req.	Notes
Transfer No.	transfer_no	Auto Number	Y	
Created Date	created_date	Date	Y	
From Warehouse	from_warehouse	Lookup (Warehouse)	Y	
To Warehouse	to_warehouse	Lookup (Warehouse)	Y	
Dispatch Date	dispatch_date	Date		
Transporter	transporter	Lookup (Transporter)		
Freight Terms	freight_terms	Dropdown	Y	
Loading Wages	loading_wages	Currency		
Freight Amount	freight_amount	Currency		
Transfer Lines	transfer_lines	Subform	Y	Products
Status	status	Dropdown	Y	Draft / In Transit / Received / Closed
Documents	documents	File Upload		DC

1.6.2.1 Transfer Lines (subform)

Field	Link Name	Type	Req.	Notes
Product	product	Lookup (Product)	Y	
Batch	batch	Single Line	C	
Quantity	quantity	Decimal	Y	
UOM	uom	Dropdown	Y	
Source Godown	source_godown	Dropdown	Y	
Destination Godown	destination_godown	Dropdown	Y	

1.6.3 Stock Transfer Receipt

Field	Link Name	Type	Req.	Notes
Receipt No.	receipt_no	Auto Number	Y	
Receipt Date	receipt_date	Date	Y	
From Warehouse	from_warehouse	Lookup (Warehouse)	Y	
To Warehouse	to_warehouse	Lookup (Warehouse)	Y	
Linked Transfer	linked_transfer	Lookup (Stock Transfer DC)	Y	

Field	Link Name	Type	Req.	Notes
Received By	received_by	Lookup (Stakeholder User)	Y	
Receipt Lines	receipt_lines	Subform	Y	
QC Result	qc_result	Dropdown		Pass / Fail
Variance Notes	variance_notes	Multi-line		
Freight Details	freight_details	Subform		Local drayage
Loading Unloading Wages	loading_unloading_'	Subform		
Status	status	Dropdown	Y	Draft / Completed

1.6.3.1 Receipt Lines (subform)

Field	Link Name	Type	Req.	Notes
Product	product	Lookup (Product)	Y	
Batch	batch	Single Line		
Quantity Dispatched	quantity_dispatched	Decimal	Y	
Quantity Received	quantity_received	Decimal	Y	
UOM	uom	Dropdown	Y	
Received Godown	received_godown	Dropdown	Y	
Condition	condition	Dropdown		Good / Damaged

1.6.4 Warehouse Shifting

Field	Link Name	Type	Req.	Notes
Shifting No.	shifting_no	Auto Number	Y	
Warehouse	warehouse	Lookup (Warehouse)	Y	
Request Date	request_date	Date	Y	
From Godown	from_godown	Dropdown	Y	
To Godown	to_godown	Dropdown	Y	
Reason Code	reason_code	Dropdown	Y	Damage / Space Optimisation / Audit / Other
Other Reason	other_reason	Multi-line	C	Mandatory when Reason = Other
Products	products	Subform	Y	
Freight/Wage Drafts	freight_wage_drafts	Subform		

Field	Link Name	Type	Req.	Notes
Status	status	Dropdown	Y	Draft / Pending Approval / Approved / Completed
In-Transit Flag	in_transit_flag	Checkbox		
Attachments	attachments	File Upload		Evidence

1.6.4.1 Products (subform)

Field	Link Name	Type	Req.	Notes
Product	product	Lookup (Product)	Y	
Batch	batch	Single Line		
Quantity	quantity	Decimal	Y	
UOM	uom	Dropdown	Y	

1.6.4.2 Freight/Wage Drafts (subform)

Field	Link Name	Type	Req.	Notes
Expense Type	expense_type	Dropdown	Y	Freight / Loading / Unloading
Vendor	vendor	Lookup (Ven- dor/Transporter)	C	Mandatory when payable by company
Amount	amount	Currency	Y	
Payable By	payable_by	Dropdown	Y	Sending Warehouse / Receiving Warehouse
Approval Status	approval_status	Dropdown	Y	Draft / Pending / Approved

1.6.5 Job Work Order

Field	Link Name	Type	Req.	Notes
Order No.	order_no	Auto Number	Y	
Warehouse	warehouse	Lookup (Warehouse)	Y	
Vendor	vendor	Lookup (Vendor)	Y	
Template	template	Lookup (Template Library)	Y	
Template Revision	template_revision	Number	Y	

Field	Link Name	Type	Req.	Notes
Start Date	start_date	Date	Y	From template
Expected Completion Date	expected_completio	Date		
Turnaround Threshold	turnaround_thresho	Number		For alerts
Materials Supplied	materials_supplied	Subform	Y	
Outputs Expected	outputs_expected	Subform	Y	
Freight Terms	freight_terms	Dropdown	Y	
Status	status	Dropdown	Y	Draft / In Progress / Completed
Alerts Enabled	alerts_enabled	Checkbox		Trigger overdue reminders

1.6.5.1 Materials Supplied (subform)

Field	Link Name	Type	Req.	Notes
Material Type	material_type	Dropdown	Y	RM / PM / Machine
Product/Machine	product_machine	Lookup (Product or Machine)	Y	
Batch	batch	Single Line		
Quantity	quantity	Decimal	Y	
UOM	uom	Dropdown	Y	

1.6.5.2 Outputs Expected (subform)

Field	Link Name	Type	Req.	Notes
Product	product	Lookup (Product)	Y	
Expected Quantity	expected_quantity	Decimal	Y	
UOM	uom	Dropdown	Y	
Expected Batch Suffix	expected_batch_su	Single Line		For tracking

1.6.6 Job Work DC

Field	Link Name	Type	Req.	Notes
JW DC No.	jw_dc_no	Auto Number	Y	
Job Work Order	job_work_order	Lookup (Job Work Order)	Y	

Field	Link Name	Type	Req.	Notes
Vendor	vendor	Lookup (Vendor)	Y	
Dispatch Date	dispatch_date	Date	Y	
Transporter	transporter	Lookup (Transporter)		
Freight Terms	freight_terms	Dropdown	Y	
Issued Materials	issued_materials	Subform	Y	
Documents	documents	File Upload		DC, challan
Status	status	Dropdown	Y	Draft / Dispatched / Completed

1.6.6.1 Issued Materials (subform)

Field	Link Name	Type	Req.	Notes
Material Type	material_type	Dropdown	Y	RM / PM / Machine
Product/Machine	product_machine	Lookup (Product or Machine)	Y	
Batch	batch	Single Line		
Quantity	quantity	Decimal	Y	
UOM	uom	Dropdown	Y	
Expected Return Date	expected_return_date	Date		

1.6.7 Job Work Receipt

Field	Link Name	Type	Req.	Notes
Receipt No.	receipt_no	Auto Number	Y	
Receipt Date	receipt_date	Date	Y	
Job Work Order	job_work_order	Lookup (Job Work Order)	Y	
JW DC Reference	jw_dc_reference	Lookup (Job Work DC)	Y	
Vendor	vendor	Lookup (Vendor)	Y	
Returned Goods	returned_goods	Subform	Y	
New Batch ID	new_batch_id	Single Line		Distinct batch
QC Result	qc_result	Dropdown		Pass / Fail
Pending Quantity	pending_quantity	Decimal	Y	
Charges	charges	Subform		Job work + freight
Status	status	Dropdown	Y	Draft / Completed

Field	Link Name	Type	Req.	Notes
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1.6.7.1 Returned Goods (subform)

Field	Link Name	Type	Req.	Notes
Product	product	Lookup (Product)	Y	
Batch	batch	Single Line	Y	
Quantity Received	quantity_received	Decimal	Y	
UOM	uom	Dropdown	Y	
Viability	viability	Dropdown		Resaleable / Reformulate / Scrap

1.6.7.2 Charges (subform)

Field	Link Name	Type	Req.	Notes
Charge Type	charge_type	Dropdown	Y	Job Work / Freight / Loading / Unloading
Amount	amount	Currency	Y	
TDS %	tds	Decimal		Separate rates
Payable By	payable_by	Dropdown	Y	Company / Vendor

1.6.8 Sales Return Advice

Field	Link Name	Type	Req.	Notes
Return No.	return_no	Auto Number	Y	
Return Date	return_date	Date	Y	
Customer	customer	Lookup (Customer)	Y	
Original Invoice	original_invoice	Lookup (Sales Invoice Check)	Y	
Returned By	returned_by	Single Line		Customer contact
Received Warehouse	received_warehouse	Lookup (Warehouse)	Y	
Return Lines	return_lines	Subform	Y	
Freight Terms	freight_terms	Dropdown	Y	
Freight Charges	freight_charges	Subform		
Loading/Unloading Charges	loading_unloading_charges	Subform		
QC Requirement	qc_requirement	Dropdown	Y	Required / Optional

Field	Link Name	Type	Req.	Notes
Approval Status	approval_status	Dropdown	Y	Draft / Pending / Approved / Rejected
Approval Trail	approval_trail	Subform		
Remarks	remarks	Multi-line		

1.6.8.1 Return Lines (subform)

Field	Link Name	Type	Req.	Notes
Product	product	Lookup (Product)	Y	
Batch	batch	Single Line		
Quantity Returned	quantity_returned	Decimal	Y	
UOM	uom	Dropdown	Y	Resaleable / Reformulate / Scrap
Condition	condition	Dropdown	Y	
Viability Notes	viability_notes	Multi-line		
Packing Material Captured	packing_material_c	Lookup (Product)		

1.6.8.2 Freight Charges (subform)

Field	Link Name	Type	Req.	Notes
Freight Type	freight_type	Dropdown	Y	Local Drayage / Linehaul
Transporter	transporter	Lookup (Transporter)		
Amount	amount	Currency	Y	Company / Customer
Discount	discount	Currency		
Payable By	payable_by	Dropdown	Y	

1.6.8.3 Loading/Unloading Charges (subform)

Field	Link Name	Type	Req.	Notes
Charge Type	charge_type	Dropdown	Y	Loading / Unloading
Contractor Vendor	contractor_vendor	Lookup (Vendor)		
Amount	amount	Currency	Y	Company / Customer
TDS %	tds	Decimal		
Payable By	payable_by	Dropdown	Y	

1.6.9 Stock Adjustment

Field	Link Name	Type	Req.	Notes
Adjustment No.	adjustment_no	Auto Number	Y	
Adjustment Date	adjustment_date	Date	Y	
Warehouse	warehouse	Lookup (Warehouse)	Y	
Godown	godown	Dropdown	Y	
Product	product	Lookup (Product)	Y	
Batch	batch	Single Line		
Adjustment Type	adjustment_type	Dropdown	Y	Positive / Negative
Quantity	quantity	Decimal	Y	
UOM	uom	Dropdown	Y	
Reason Code	reason_code	Dropdown	Y	Damage / Expiry / Shortage / Surplus / Audit Correction / Others
Other Reason	other_reason	Multi-line	C	Mandatory if Others
Evidence Attachments	evidence_attachme	File Upload	Y	Photos, documents
Value Impact	value_impact	Currency	Y	Auto-calculated
Finance Review Required	finance_review_req	Checkbox	Y	Auto flag if value > ₹25,000
Approval Status	approval_status	Dropdown	Y	Draft / Pending / Approved / Rejected
Approved By	approved_by	Lookup (Stakeholder User)		
Approval Date	approval_date	Date-Time		
Notified To	notified_to	Multi-select Lookup (Stakeholder User)		Office Manager notification
Notes	notes	Multi-line		

1.7 7. Finance Module

1.7.1 Vendor Ledger

Field	Link Name	Type	Req.	Notes
Ledger ID	ledger_id	Auto Number	Y	

Field	Link Name	Type	Req.	Notes
Vendor	vendor	Lookup (Vendor)	Y	
Document Type	document_type	Dropdown	Y	PO / Receipt / Invoice / Freight / Wage / Credit Note
Document Reference	document_reference	Lookup (Varies)	Y	
Document Date	document_date	Date	Y	
Debit Amount	debit_amount	Currency		
Credit Amount	credit_amount	Currency		
Tax Breakdown	tax_breakdown	Subform		
Due Date	due_date	Date		
Payment Status	payment_status	Dropdown	Y	Not Due / Partially Paid / Paid / Overdue
Ageing Bucket	ageing_bucket	Dropdown		0-30 / 31-60 / >60
Notes	notes	Multi-line		

1.7.1.1 Tax Breakdown (subform)

Field	Link Name	Type	Req.	Notes
Tax Type	tax_type	Dropdown	Y	GST / TDS / TCS
Rate %	rate	Decimal	Y	
Amount	amount	Currency	Y	

1.7.2 Payment Advice Workflow

Field	Link Name	Type	Req.	Notes
Advice No.	advice_no	Auto Number	Y	
Beneficiary Type	beneficiary_type	Dropdown	Y	Vendor / Transporter / Contractor
Beneficiary	beneficiary	Lookup (Vendor/Transporter)	Y	
Source Document	source_document	Lookup (Varies)	Y	
Amount	amount	Currency	Y	
TDS/TCS Details	tds_tcs_details	Subform		
Due Date	due_date	Date	Y	
Payment Method	payment_method	Dropdown	Y	Bank Transfer / Cash / Cheque / UPI

Field	Link Name	Type	Req.	Notes
Bank Account	bank_account	Lookup (Vendor Bank Details)	C	Required for bank transfer
Prepared By	prepared_by	Lookup (Stakeholder User)	Y	
Prepared Date	prepared_date	Date	Y	
Finance Manager Approval	finance_manager_a	Subform	Y	Stage 1
Office Manager Authorization	office_manager_aut	Subform	Y	Stage 2
Payment Status	payment_status	Dropdown	Y	Draft / Pending Finance / Pending Authorization / Approved / Paid
Payment Reference	payment_reference	Single Line		Bank txn
Attachments	attachments	File Upload		Bank proof

1.7.2.1 TDS/TCS Details (subform)

Field	Link Name	Type	Req.	Notes
Tax Type	tax_type	Dropdown	Y	TDS / TCS
Section	section	Single Line		
Rate %	rate	Decimal	Y	
Amount	amount	Currency	Y	

1.7.2.2 Finance Manager Approval (subform)

Field	Link Name	Type	Req.	Notes
Approved By	approved_by	Lookup (Stakeholder User)	Y	
Approval Date	approval_date	Date-Time	Y	
Remarks	remarks	Multi-line		

1.7.2.3 Office Manager Authorization (subform)

Field	Link Name	Type	Req.	Notes
Authorized By	authorized_by	Lookup (Stakeholder User)	Y	
Authorization Date	authorization_date	Date-Time	Y	
Remarks	remarks	Multi-line		

1.7.3 Bank Statement Upload

Field	Link Name	Type	Req.	Notes
Upload ID	upload_id	Auto Number	Y	
Bank Account	bank_account	Dropdown	Y	
Statement Period Start	statement_period_s	Date	Y	
Statement Period End	statement_period_e	Date	Y	
Upload Date	upload_date	Date	Y	
Statement File	statement_file	File Upload	Y	PDF/CSV
Parsing Status	parsing_status	Dropdown	Y	Pending / Parsed / Error
Auto-Matched Entries	auto_matched_entri	Subform		
Exceptions	exceptions	Subform		
Remarks	remarks	Multi-line		

1.7.3.1 Auto-Matched Entries (subform)

Field	Link Name	Type	Req.	Notes
Statement Line ID	statement_line_id	Single Line	Y	
Match Type	match_type	Dropdown	Y	Payable / Receivable
Linked Document	linked_document	Lookup (Vendor Ledger / Customer Ledger)	Y	
Amount	amount	Currency	Y	
Status	status	Dropdown	Y	Confirmed / Pending

1.7.3.2 Exceptions (subform)

Field	Link Name	Type	Req.	Notes
Statement Line ID	statement_line_id	Single Line	Y	

Field	Link Name	Type	Req.	Notes
Transaction Date	transaction_date	Date	Y	
Amount	amount	Currency	Y	
Suggested Match	suggested_match	Lookup (Ledger)		
Exception Notes	exception_notes	Multi-line		
Resolution Status	resolution_status	Dropdown	Y	Open / Resolved

1.7.4 Customer Ledger

Field	Link Name	Type	Req.	Notes
Ledger ID	ledger_id	Auto Number	Y	
Customer	customer	Lookup (Customer)	Y	
Document Type	document_type	Dropdown	Y	Invoice / Receipt / Credit Note
Document Reference	document_reference	Lookup (Sales Invoice Check / Receipts)	Y	
Document Date	document_date	Date	Y	
Debit Amount	debit_amount	Currency		
Credit Amount	credit_amount	Currency		
Due Date	due_date	Date		
Payment Status	payment_status	Dropdown	Y	Not Due / Partially Paid / Paid / Overdue
Reminder Sent Flags	reminder_sent_flags	Subform		
Notes	notes	Multi-line		

1.7.5 Freight Ledger

Field	Link Name	Type	Req.	Notes
Ledger ID	ledger_id	Auto Number	Y	
Direction	direction	Dropdown	Y	Inbound / Outbound / Transfer
Transporter	transporter	Lookup (Transporter)	Y	
Freight Advice	freight_advice	Lookup (Freight Advice)	Y	
Amount	amount	Currency	Y	
Discount	discount	Currency		

Field	Link Name	Type	Req.	Notes
Shipment Quantity	shipment_quantity	Decimal		Pulled from freight advice
Quantity UOM	quantity_uom	Dropdown		
Cost Per Unit	cost_per_unit	Decimal		Stored for reporting
Destination State	destination_state	Dropdown		Enables cost-per-destination analytics
Payment Schedule	payment_schedule	Subform		
Amount Paid	amount_paid	Currency		
Balance	balance	Currency	Y	
Reminder Flag	reminder_flag	Checkbox		Auto reminder on due date
Notes	notes	Multi-line		

1.7.6 Wage Ledger

Field	Link Name	Type	Req.	Notes
Ledger ID	ledger_id	Auto Number	Y	
Wage Voucher	wage_voucher	Lookup (Wage Voucher)	Y	
Contractor/Staff Group	contractor_staff_grc	Lookup (Vendor or Staff)	Y	
Amount	amount	Currency	Y	
TDS %	tds	Decimal		
Payment Week	payment_week	Date	Y	Week ending date
Approval Status	approval_status	Dropdown	Y	Draft / Pending / Approved / Paid
Settlement Method	settlement_method	Dropdown	Y	Bank Transfer / Cash
Notes	notes	Multi-line		

1.7.7 Credit/Debit Note

Field	Link Name	Type	Req.	Notes
Note No.	note_no	Auto Number	Y	
Note Type	note_type	Dropdown	Y	Credit / Debit
Vendor/Customer	vendor_customer	Lookup (Vendor or Customer)	Y	

Field	Link Name	Type	Req.	Notes
Source Document	source_document	Lookup (PO / Invoice / Sales Invoice Check)	Y	
Amount	amount	Currency	Y	
Tax	tax	Currency		
Reason	reason	Multi-line	Y	
Approval Status	approval_status	Dropdown	Y	Draft / Pending / Approved
Approved By	approved_by	Lookup (Stakeholder User)		
Approval Date	approval_date	Date-Time		
Ledger Posting Reference	ledger_posting_ref	Lookup (Ledger)		

1.7.8 GST Reconciliation Report

Field	Link Name	Type	Req.	Notes
Report ID	report_id	Auto Number	Y	
Reporting Period	reporting_period	Date Range	Y	Month/Quarter
Data Source	data_source	Dropdown	Y	Creator / GSTR-2B / GSTR-1
Variance Summary	variance_summary	Multi-line		
Adjustments	adjustments	Subform		
Export File	export_file	File Upload		CSV for Tally

1.7.8.1 Adjustments (subform)

Field	Link Name	Type	Req.	Notes
Adjustment Type	adjustment_type	Dropdown	Y	ITC Reversal / Additional Claim
Amount	amount	Currency	Y	
Notes	notes	Multi-line		
Approved By	approved_by	Lookup (Stakeholder User)		

1.7.9 Petty Cash Register

Field	Link Name	Type	Req.	Notes
Register ID	register_id	Auto Number	Y	
Warehouse	warehouse	Lookup (Warehouse)	Y	
Coordinator	coordinator	Lookup (Stakeholder User)	Y	
Opening Balance	opening_balance	Currency	Y	
Transactions	transactions	Subform	Y	
Current Balance	current_balance	Currency	Y	Auto-calculated
Last Reconciled Date	last_reconciled_date	Date		

1.7.9.1 Transactions (subform)

Field	Link Name	Type	Req.	Notes
Transaction Date	transaction_date	Date	Y	
Voucher Reference	voucher_reference	Lookup (Payment Advice / Wage Voucher)	Y	
Amount	amount	Currency	Y	
Type	type	Dropdown	Y	Advance / Settlement
Notes	notes	Multi-line		

1.8 8. Attendance & HR Module

1.8.1 Shift Definition

Field	Link Name	Type	Req.	Notes
Shift Code	shift_code	Single Line	Y	
Warehouse	warehouse	Lookup (Warehouse)	Y	
Shift Name	shift_name	Single Line	Y	
Start Time	start_time	Time	Y	
End Time	end_time	Time	Y	
Break Duration (mins)	break_duration_min	Number		
Overtime Eligibility	overtime_eligibility	Checkbox		
Attendance Calculation Rule	attendance_calculation_rule	Dropdown	Y	8-hour / Custom

Field	Link Name	Type	Req.	Notes
Grace Period Minutes	grace_period_minut	Number		
Approval Required	approval_required	Checkbox		

1.8.2 Attendance Capture

Field	Link Name	Type	Req.	Notes
Record ID	record_id	Auto Number	Y	
Staff	staff	Lookup (Staff)	Y	
Date	date	Date	Y	
Check-in Time	check_in_time	Date-Time	Y	
Check-out Time	check_out_time	Date-Time		
Entry Photo	entry_photo	Image Upload	Y	Retained 7 days
Exit Photo	exit_photo	Image Upload		Retained 7 days
Geo Latitude	geo_latitude	Decimal	Y	Must fall within warehouse geofence
Geo Longitude	geo_longitude	Decimal	Y	
Face Match Confidence	face_match_confide	Decimal	Y	From external API
Device ID	device_id	Single Line	Y	HR device
Shift	shift	Lookup (Shift Definition)	Y	
Attendance Status	attendance_status	Dropdown	Y	Present / Absent / Half Day / Permission
Overtime Hours	overtime_hours	Decimal		
Notes	notes	Multi-line		

1.8.3 Leave Request

Field	Link Name	Type	Req.	Notes
Request No.	request_no	Auto Number	Y	
Staff	staff	Lookup (Staff)	Y	
Leave Type	leave_type	Dropdown	Y	Full Day / Half Day / Permission
Start Date	start_date	Date	Y	
End Date	end_date	Date	C	Required when full-day leave
Duration (Hours)	duration_hours	Decimal	C	Required for permission
Reason	reason	Multi-line	Y	

Field	Link Name	Type	Req.	Notes
Attachment Status	attachment status	File Upload Dropdown	Y	Medical proof Pending / Approved / Rejected
Approver	approver	Lookup (Stakeholder User)		
Approval Date	approval_date	Date-Time		

1.8.4 Overtime Request

Field	Link Name	Type	Req.	Notes
Request No.	request_no	Auto Number	Y	
Staff	staff	Lookup (Staff)	Y	
Date	date	Date	Y	
Shift	shift	Lookup (Shift Definition)		
Hours Worked	hours_worked	Decimal	Y	
Task Description	task_description	Multi-line	Y	
Supporting Evidence	supporting_evidenc	File Upload		
Approval Status	approval_status	Dropdown	Y	Pending / Approved / Rejected
Approved By	approved_by	Lookup (Stakeholder User)		Warehouse Coordinator (Office)
Wage Integration Flag	wage_integration_fl	Checkbox		Creates wage voucher

1.8.5 Payroll Export

Field	Link Name	Type	Req.	Notes
Export ID	export_id	Auto Number	Y	
Period Start	period_start	Date	Y	
Period End	period_end	Date	Y	
Warehouse	warehouse	Lookup (Warehouse)	Y	
Staff Summary	staff_summary	Subform	Y	
Attendance Metrics	attendance_metrics	Multi-line		
Overtime Hours Total	overtime_hours_tot	Decimal		
Exceptions	exceptions	Multi-line		

Field	Link Name	Type	Req.	Notes
Export File	export_file	File Upload		CSV for payroll

1.8.5.1 Staff Summary (subform)

Field	Link Name	Type	Req.	Notes
Staff	staff	Lookup (Staff)	Y	
Present Days	present_days	Number	Y	
Absent Days	absent_days	Number	Y	
Overtime Hours	overtime_hours	Decimal		
Wages Amount	wages_amount	Currency		

1.8.6 Attendance Device Log

Field	Link Name	Type	Req.	Notes
Log ID	log_id	Auto Number	Y	
Device ID	device_id	Single Line	Y	
Event Time	event_time	Date-Time	Y	
Event Type	event_type	Dropdown	Y	Capture / Sync
Status	status	Dropdown	Y	Success / Failed
Error Message	error_message	Multi-line		

1.9 9. Configuration & Audit

1.9.1 System Parameters

Field	Link Name	Type	Req.	Notes
Parameter Name	parameter_name	Single Line	Y	
Parameter Value	parameter_value	Single Line	Y	
Module Scope	module_scope	Dropdown	Y	Purchase / Sales / Inventory / Finance / Attendance
Description	description	Multi-line		
Last Updated By	last_updated_by	Lookup (Stakeholder User)	Y	
Effective Date	effective_date	Date	Y	

1.9.2 Decision Log

Field	Link Name	Type	Req.	Notes
Decision ID	decision_id	Auto Number	Y	
Topic	topic	Single Line	Y	
Stakeholders	stakeholders	Multi-select Lookup (Stakeholder User)	Y	
Decision Details	decision_details	Multi-line	Y	
Decision Date	decision_date	Date	Y	
Follow-up Actions	follow_up_actions	Multi-line		

1.9.3 Audit Trail

Field	Link Name	Type	Req.	Notes
Audit ID	audit_id	Auto Number	Y	
Module	module	Dropdown	Y	
Record ID	record_id	Single Line	Y	
Action	action	Dropdown	Y	Create / Update / Delete / Approve
User	user	Lookup (Stakeholder User)	Y	
Timestamp	timestamp	Date-Time	Y	
Before Snapshot	before_snapshot	File Upload		JSON export
After Snapshot	after_snapshot	File Upload		JSON export
Remarks	remarks	Multi-line		

Use this catalogue with the ERD and flowchart libraries to ensure every workflow, approval, and integration touchpoint is fully supported by the underlying data structures.