

# CRM - ASP.NET Core – FullStack:

Back End with REST API, Clean  
Architecture, CQRS, Repository &  
Front End with Razor Pages,  
JavaScript (Vue)



Complete ASP.NET  
Core source code

1<sup>st</sup> Edition - 2025

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CQRS, Repository & Front End with Razor  
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## 1. Introduction

This book serves as a comprehensive getting started guide for using a CRM application built with ASP.NET Core within a full-stack development approach. The application is meticulously crafted as a Visual Studio solution, divided into two major sections: the Back End and the Front End. Each section plays a crucial role in creating a seamless and efficient customer relationship management system, offering readers a deep dive into modern web development practices.

The Back End is built as a Web REST API using ASP.NET Core Controllers. It adheres to the principles of clean architecture, ensuring a scalable and maintainable codebase. The Command Query Responsibility Segregation (CQRS) pattern is implemented using MediatR, providing a clear separation between data modification and retrieval processes. Additionally, the repository pattern is employed to streamline data access and ensure consistent interaction with the database. Together, these patterns and principles establish a robust foundation for the application's server-side functionality.

The Front End leverages ASP.NET Core Razor Pages, enhanced with JavaScript and Vue.js to create a dynamic and responsive user interface. To deliver a professional and enterprise-grade experience, the Syncfusion Community Edition is utilized for advanced controls such as grids, pivot tables, schedulers, and kanban boards. Notably, Syncfusion Community Edition is free, making it an excellent choice for developers aiming to build feature-rich applications without incurring additional costs. This combination of technologies ensures a cohesive and highly functional application that meets the demands of modern customer relationship management.

## 1.1 Technology Stack

This application leverages a range of modern technologies to ensure scalability, maintainability, and a professional user experience. Each tool and framework has been carefully selected to provide an optimal development and runtime environment for the enterprise application system. Below is a list of the key technologies used in this project:

- **Visual Studio Community 2022:** An integrated development environment (IDE) used for building and managing the entire solution.
- **Microsoft SQL Server:** A robust relational database management system for storing and managing data.
- **ASP.NET Core 9.0:** A modern, high-performance framework for building web applications and APIs.
- **C#:** The primary programming language used to develop the Back End.
- **Clean Architecture:** A design principle employed to ensure a clear separation of concerns and maintainable code.
- **CQRS with MediatR:** Implements the Command Query Responsibility Segregation pattern to separate command and query responsibilities, enhancing clarity and scalability.
- **HTML / CSS / JavaScript / Vue:** Used to create a dynamic and responsive user interface for the Front End.
- **Synfusion:** A suite of enterprise-grade UI controls, such as grids, pivot tables, schedulers, and kanban boards, provided under the free Community Edition.

## 1.2 Getting Started Guide

To get started with the source code, ensure your development machine meets the following prerequisites:

1. A computer running Windows OS.
2. Visual Studio Community 2022.
3. Microsoft SQL Server (Express Edition is sufficient).

Once the development machine meets these prerequisites, follow these steps to run the application directly from the source code using Visual Studio Community 2022:

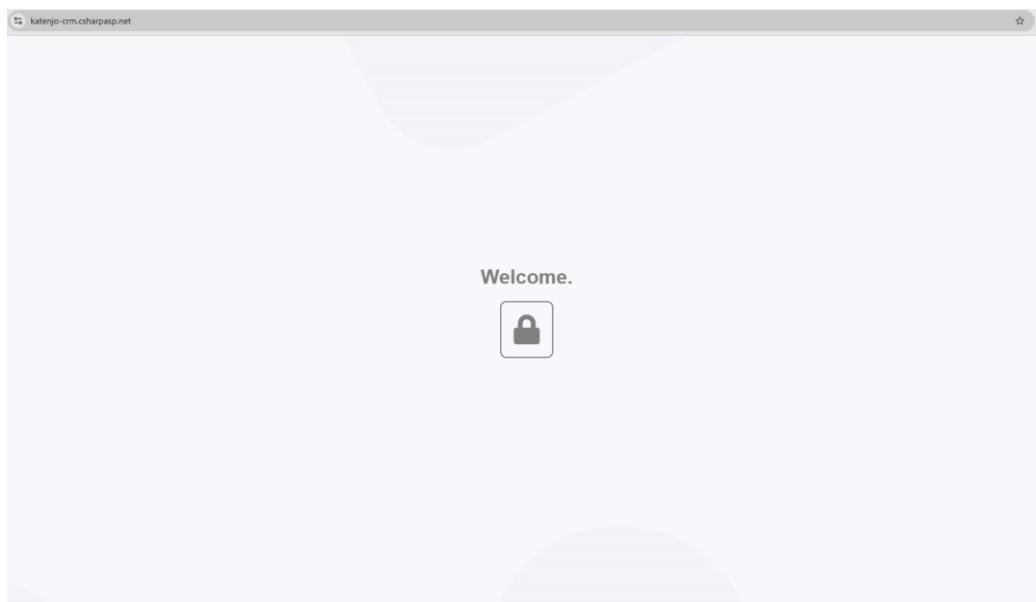
1. Unzip the source code.
2. Open the application solution using Visual Studio Community 2022.
3. Update the DefaultConnection string in the configuration file **appsettings.json** to point to your Microsoft SQL Server (SQL Server Express is sufficient).
4. Clean and build the solution: right-click > clean, right-click > build
5. Run the application by pressing F5 or navigating to **Debug > Start Debugging**. The database will be automatically created, and the application will launch in your default web browser.

Below are the credentials for logging in:

Email: [admin@root.com](mailto:admin@root.com)

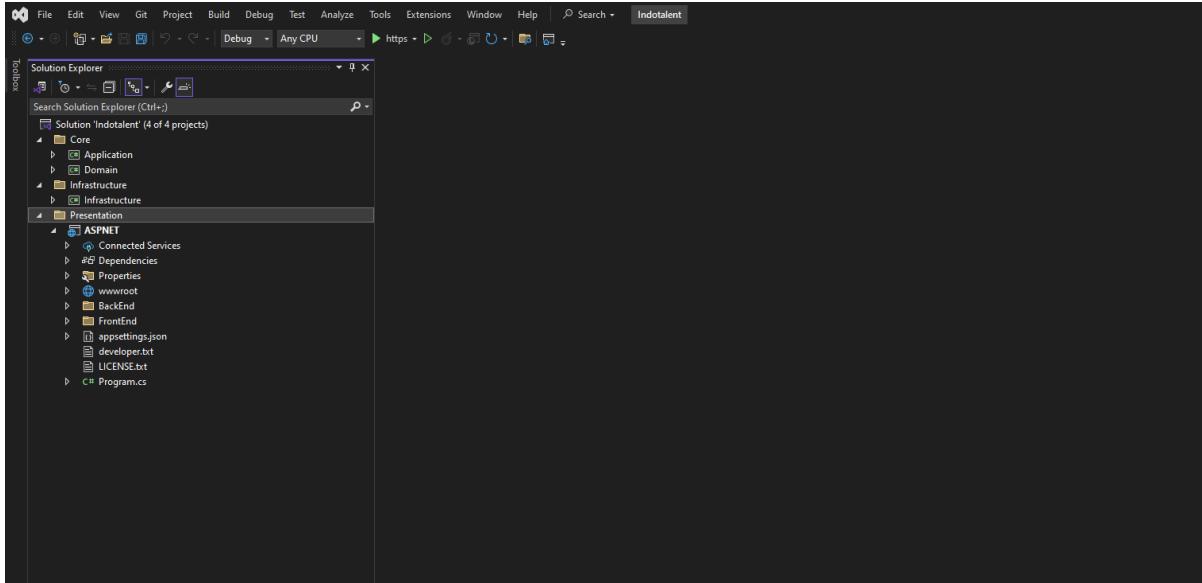
Password: 123456

The online demo can be accessed through: <https://katenjo-crm.csharpasp.net/>



## 2. Technical

### 2.1 Full Stack Web Development

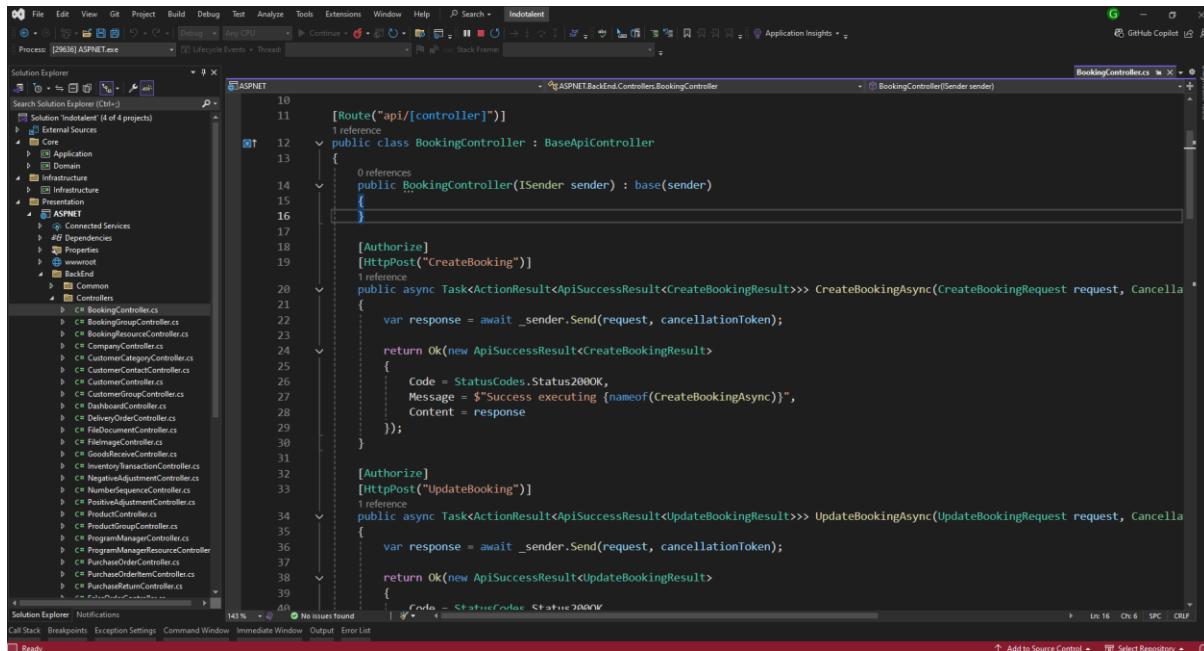


The solution for this application is designed as an ASP.NET Core full-stack web development project contained within a single solution with a multi-layered architecture. This architecture ensures clear separation of concerns and maintainability. The Back End is implemented as a Web REST API developed using the controller-based approach. It is worth noting that Microsoft currently supports two methods for building REST APIs: the traditional controller-based approach and the newer minimal API approach. For this solution, the controller-based method has been chosen as it aligns well with the clean architecture principles adopted in this project. The clean architecture is further enhanced with the use of CQRS (Command Query Responsibility Segregation) via MediatR, which ensures clear separation of commands and queries, and the repository pattern for efficient data access management.

The Front End is built using ASP.NET Core Razor Pages, which generates server-side HTML. To provide a dynamic and rich user interface experience, Vue is utilized for handling client-side interactions. This combination of server-side rendering with Razor Pages and client-side enhancements using Vue ensures a seamless and responsive user experience while maintaining simplicity and flexibility in development.

## 2.2 Back End

### 2.2.1 ASP.NET Core Web REST API



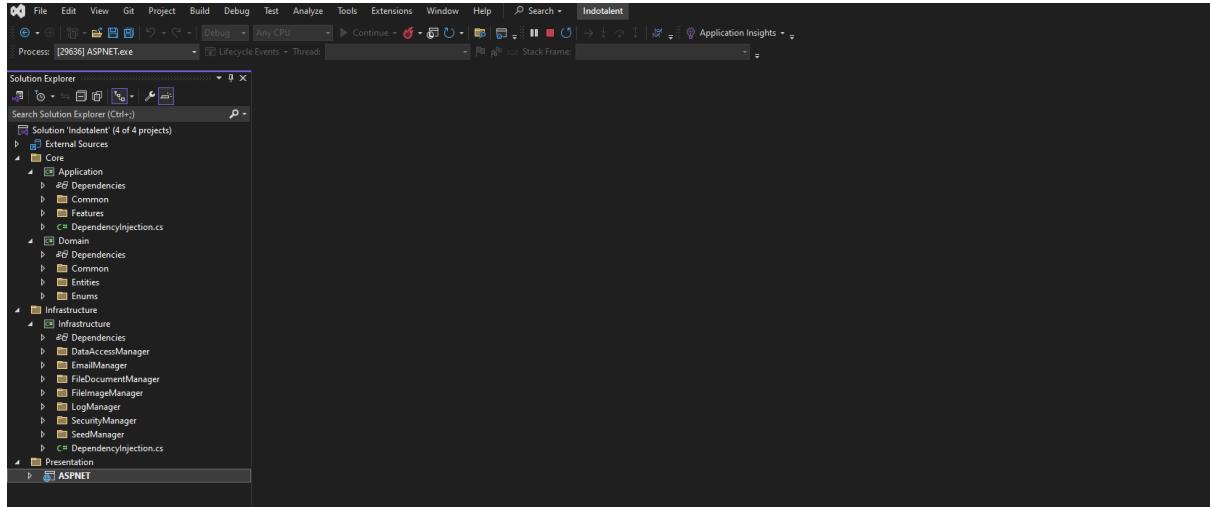
```
10  [Route("api/{controller}")]
11  public class BookingController : BaseApiController
12  {
13      [Authorize]
14      [HttpPost("CreateBooking")]
15      public async Task<ActionResult<ApiSuccessResult<CreateBookingResult>>> CreateBookingAsync(CreateBookingRequest request, CancellationToken cancellationToken)
16      {
17          var response = await _sender.Send(request, cancellationToken);
18
19          return Ok(new ApiSuccessResult<CreateBookingResult>
20          {
21              Code = StatusCodes.Status200OK,
22              Message = $"Success executing {nameof(CreateBookingAsync)}",
23              Content = response
24          });
25
26      }
27
28      [Authorize]
29      [HttpPost("UpdateBooking")]
30      public async Task<ActionResult<ApiSuccessResult<UpdateBookingResult>>> UpdateBookingAsync(UpdateBookingRequest request, CancellationToken cancellationToken)
31      {
32          var response = await _sender.Send(request, cancellationToken);
33
34          return Ok(new ApiSuccessResult<UpdateBookingResult>
35          {
36              Code = StatusCodes.Status200OK,
37              Message = $"Success executing {nameof(UpdateBookingAsync)}",
38              Content = response
39          });
40      }
41  }
```

The solution will produce two applications: an ASP.NET Web REST API and an ASP.NET Web Application. The Web REST API is developed using ASP.NET Core with a controller-based approach. This approach leverages controllers primarily for routing API endpoints, ensuring that their responsibility is limited to directing requests to the appropriate application layer components. By adopting this methodology, the controllers remain minimalistic, containing only concise and compact code that handles routing logic.

In this design, no business process logic is written in the controllers. Instead, all business operations are encapsulated within the application layer, which processes incoming requests and returns appropriate responses. This separation of concerns aligns with the principles of clean architecture, promoting maintainability and scalability by isolating business logic from the API routing layer.

As a result, the controllers in the Web REST API serve as lightweight entry points, ensuring clarity and simplicity in the API design. This structure not only streamlines the development process but also enhances code readability and reusability across the project.

## 2.2.2 Clean Architecture

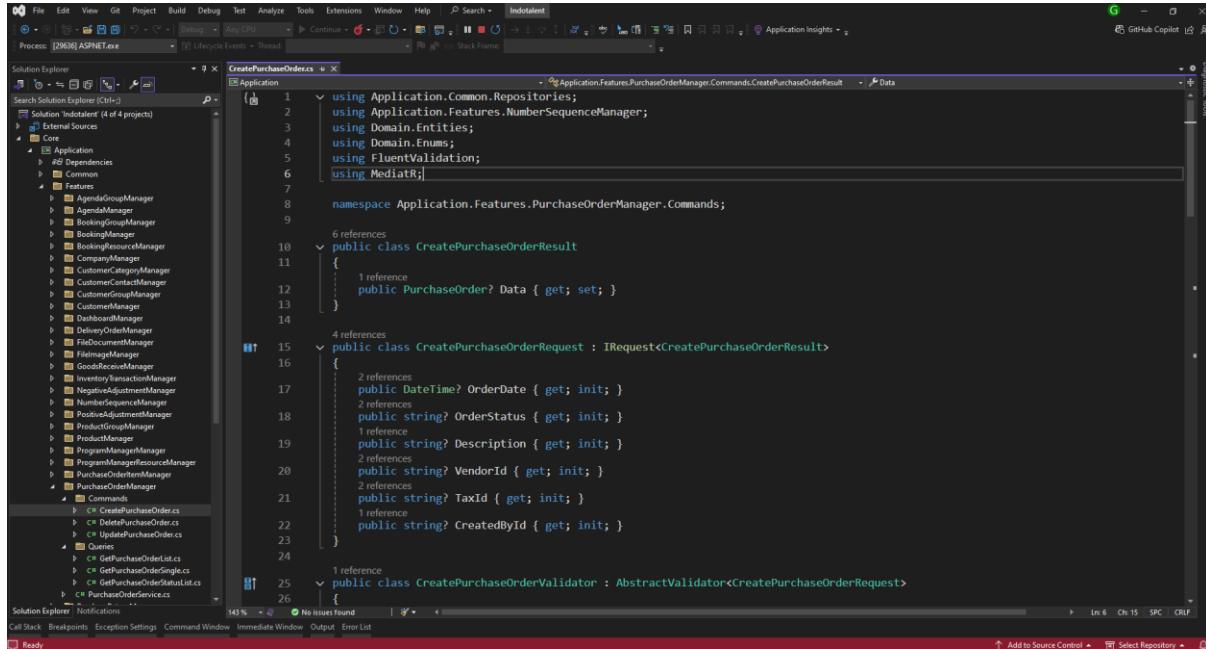


Clean architecture, introduced by Robert C. Martin, also known as Uncle Bob, provides guidance on dependency management within a project. The core principle of clean architecture is that the innermost layers of a system should remain independent and free from dependencies on outer layers. Following this principle, the solution is structured into multiple projects, each representing a distinct layer of the clean architecture model. These layers, ordered from innermost to outermost, are Domain, Application, Infrastructure, and Presentation.

The Domain layer is implemented within the Domain project and focuses on defining the core entities of the application. The Application layer resides in the Application project and is dedicated to implementing business processes, referred to as Features, using the Command Query Responsibility Segregation (CQRS) pattern. This layer leverages MediatR to handle commands and queries effectively. The Infrastructure layer, contained within the Infrastructure project, manages external dependencies such as databases and email services.

Finally, the Presentation layer is implemented within an ASP.NET project that serves as both a Web API and a Web Application. The Web API uses a controller-based approach for routing and interacting with the Application layer. For simplicity, both the Web API and the Web Application are combined into a single project. However, this design is flexible enough to allow the separation of these components into distinct projects that can be deployed on different servers if needed.

## 2.2.3 CQRS with MediatR



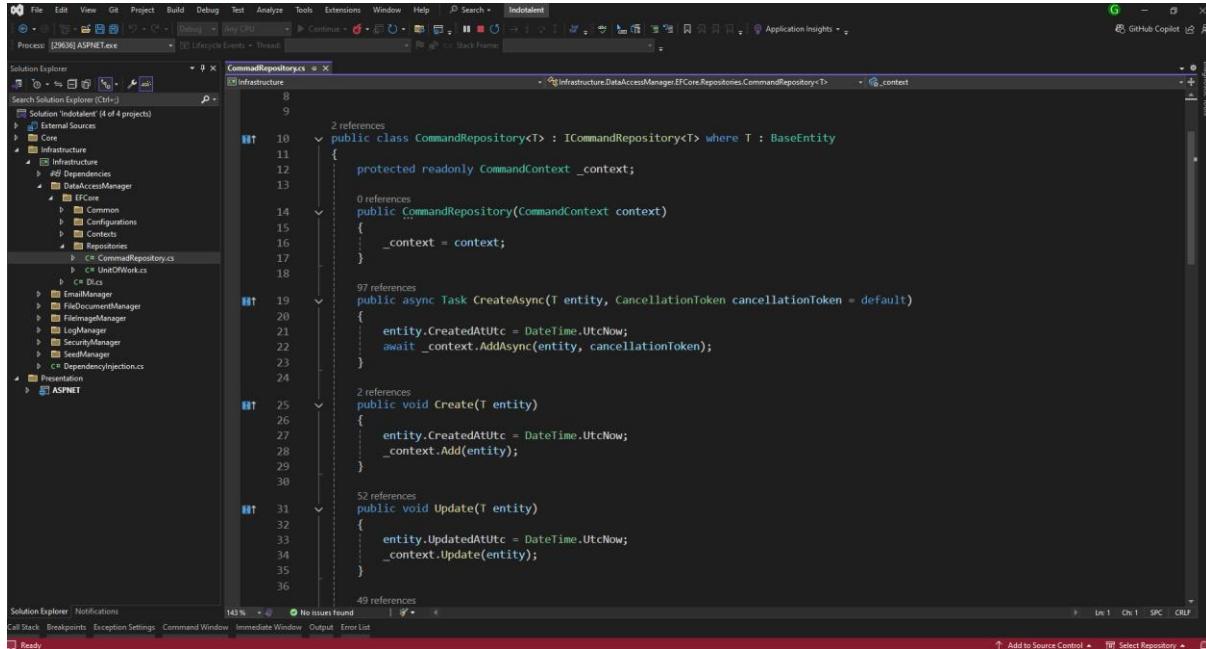
```
1  using Application.Common.Repositories;
2  using Application.Features.NumberSequenceManager;
3  using Domain.Enums;
4  using FluentValidation;
5  using MediatR;
6
7  namespace Application.Features.PurchaseOrderManager.Commands;
8
9
10 public class CreatePurchaseOrderResult
11 {
12     public PurchaseOrder? Data { get; set; }
13 }
14
15 public class CreatePurchaseOrderRequest : IRequest<CreatePurchaseOrderResult>
16 {
17     public DateTime? OrderDate { get; init; }
18     public string? OrderStatus { get; init; }
19     public string? Description { get; init; }
20     public string? VendorId { get; init; }
21     public string? TaxId { get; init; }
22     public string? CreatedById { get; init; }
23 }
24
25 public class CreatePurchaseOrderValidator : AbstractValidator<CreatePurchaseOrderRequest>
26 {
```

The Application layer, encapsulated within the Application project, serves as the core of all business processes in the solution. This layer is intentionally designed to be thicker than the other layers, as it consolidates and centralizes all business logic. By doing so, it ensures that the business processes are well-structured and separated from concerns like infrastructure and presentation.

Business processes within the Application layer are categorized into two primary groups: data retrieval and data modification. All activities related to data retrieval are organized under the Queries folder, while those involving data modification are grouped under the Commands folder. This separation aligns with the Command Query Responsibility Segregation (CQRS) pattern, which simplifies the architecture by clearly distinguishing between read and write operations.

To streamline the implementation of CQRS, the project leverages MediatR, a third-party library developed by Jimmy Bogard, who is also known for creating AutoMapper. MediatR provides a straightforward mechanism to handle commands and queries through a mediator pattern, enhancing maintainability and reducing dependencies between components in the application. By adopting MediatR, the Application layer becomes more modular and easier to extend.

## 2.2.4 Repository



The screenshot shows the Visual Studio IDE with the CommandRepository.cs file open in the code editor. The code implements the ICommandRepository<T> interface for a BaseEntity. It includes methods for creating and updating entities, both with and without cancellation tokens. The code editor highlights references with dashed lines and shows their counts (e.g., 97 references for CreateAsync). The Solution Explorer on the left shows the project structure, including Infrastructure, Core, and Presentation layers.

```
public class CommandRepository<T> : ICommandRepository<T> where T : BaseEntity
{
    protected readonly CommandContext _context;

    public CommandRepository(CommandContext context)
    {
        _context = context;
    }

    public async Task CreateAsync(T entity, CancellationToken cancellationToken = default)
    {
        entity.CreatedAtUtc = DateTime.UtcNow;
        await _context.AddAsync(entity, cancellationToken);
    }

    public void Create(T entity)
    {
        entity.CreatedAtUtc = DateTime.UtcNow;
        _context.Add(entity);
    }

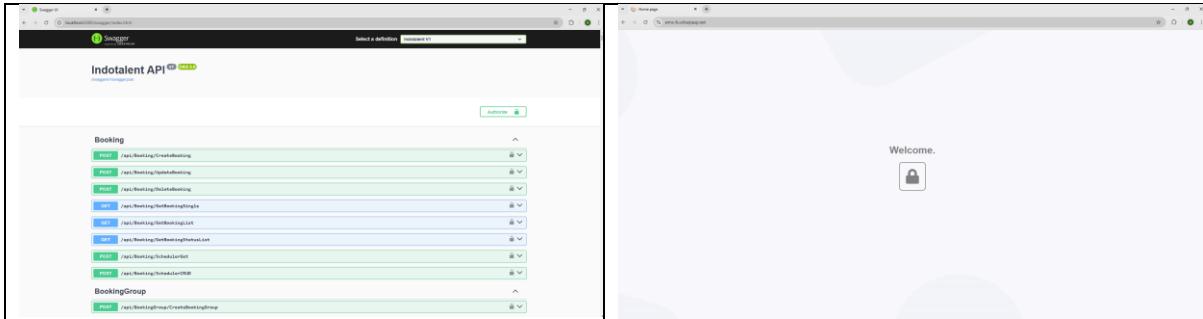
    public void Update(T entity)
    {
        entity.UpdatedAtUtc = DateTime.UtcNow;
        _context.Update(entity);
    }
}
```

The Infrastructure layer serves as the foundation for handling external resources such as databases, email services, and other third-party integrations. This layer centralizes all code related to external dependencies, ensuring that resource access is organized and maintainable. By isolating these operations, the Infrastructure layer enables better separation of concerns and promotes the principles of Clean Architecture.

For data access to the database, the repository pattern is employed within the Infrastructure layer. The repository pattern acts as a mediator between the domain and data mapping layers, providing a consistent and controlled approach to data persistence. This approach is particularly beneficial for the Command operations in the CQRS architecture, where it ensures that data insertion and modification follow a standardized and reliable process. By encapsulating database logic within repositories, the application gains better maintainability and flexibility, as changes to the data access logic can be made without affecting the higher layers of the application.

On the other hand, Queries are designed to be as simple and fast as possible. To achieve this, direct access to the database context is granted for read operations, bypassing the repository pattern. This approach provides the freedom to optimize queries for performance and even allows the flexibility to replace the underlying technology with alternatives like Dapper for improved speed and efficiency in data retrieval. By distinguishing the handling of Commands and Queries in this manner, the application achieves a balance between consistency in data modification and performance in data retrieval.

## 2.3 Front End



The back-end application is implemented as a Web REST API, providing endpoints designed to be consumed by other programs or systems, rather than directly by human users. These endpoints act as the backbone of the application, enabling data retrieval, creation, modification, and deletion in a structured and programmatically accessible manner. The Web REST API ensures that the business logic and data processing are handled securely and efficiently, while adhering to the principles of clean architecture and separation of concerns.

On the other hand, the front-end application is a web-based user interface designed specifically for human users to interact with the system. It bridges the gap between the underlying application logic and the users by offering an intuitive and user-friendly interface. Through the front-end, users can perform various tasks, such as viewing data, creating new entries, or modifying existing ones, without needing to understand the underlying complexity of the back-end processes.

In this architecture, the front-end application acts as both a consumer of the Web REST API and a provider of a visual and interactive interface for users. It sends requests to the back-end API to fetch or persist data and then displays the results to the user in an accessible format. At the same time, it collects user inputs, processes them, and sends them back to the API for further action. This dual role ensures that the application remains functional and efficient while delivering a seamless experience for human users.

### 2.3.1 ASP.NET Razor Pages

The screenshot shows the Visual Studio IDE interface. On the left, the Solution Explorer displays a multi-project solution named 'Indotelant' containing four projects: ASP.NET, Core, Infrastructure, and Application. The ASP.NET project is expanded, showing its structure. In the center, the code editor has two tabs open: 'Login.cshtml' and 'App.js'. 'Login.cshtml' contains the server-side Razor code for a login page, including HTML for a form and a button, and an ASP.NET navigation link. 'App.js' contains the client-side JavaScript code for the application, defining an 'App' object with methods like 'login' and 'registerEventHandlers'. The bottom status bar indicates 'No issues found'.

The front-end is developed using ASP.NET Core Razor Pages, combined with JavaScript and Vue to create a dynamic and interactive user experience. Razor Pages is a server-side web framework that generates HTML on the server and serves it to the client. This approach provides a structured and predictable way to manage the application's UI while taking advantage of server-side rendering for improved performance. By using Razor Pages, each page in the application is tied to a physical file, making it intuitive to define URL routing based on the file structure. This simplicity significantly enhances the development process, allowing developers to easily organize and locate code.

Once the server-side-generated HTML is delivered to the browser, Vue is used to enrich the interface with client-side interactivity. Vue, a lightweight and powerful JavaScript library, simplifies DOM manipulation, event handling, and AJAX calls. It allows developers to add dynamic behaviors to the pages, such as real-time form validation, interactive menus, and smooth animations, with minimal code. Moreover, Vue seamlessly integrates with Razor Pages, enabling the front-end to dynamically interact with the back-end Web REST API for data retrieval and updates without requiring full-page reloads.

The combination of Razor Pages and Vue strikes a balance between server-side rendering and client-side interactivity, resulting in a scalable and user-friendly web application. Razor Pages ensures clean, maintainable, and structured server-side code, while Vue provides the flexibility to enhance the user experience on the client side. This hybrid approach ensures that the front-end not only delivers a robust interface but also remains responsive and engaging for end-users.

### 2.3.2 JavaScript with Vue

The screenshot shows the Microsoft Visual Studio interface with the following details:

- Solution Explorer:** Shows the project structure for "ASPNET" under the "ASNET" folder. It includes "lib" (with "axios", "bootstrap", "jquery", "select2", "sweetalert", "sweetalert2", "font-awesome", and "indostalent" subfolders), "Pages" (with "Account" and "EmailConfirm" subfolders), and files like "index.html", "About.cshtml", "Home.cshtml", "Error.cshtml", "NotFound.cshtml", and "noimage.png".
- Code Editor:** The file "axios.manager.js" is open. The code handles axios interceptors for responses, specifically dealing with refresh tokens and retry logic.
- Status Bar:** Shows "143 %", "55", and "No issues found".

```
return Promise.reject(error);
};

axiosInstance.interceptors.response.use(
  (response) => response,
  async (error) => {
    const originalRequest = error.config;
    if (error.response && error.response.status === 498) {
      if (!isRefreshing) {
        isRefreshing = true;

        try {
          const refreshToken = StorageManager.getRefreshToken();
          const response = await axiosInstance.post('/security/RefreshToken', { refreshToken });

          if (response.data.code === 200) {
            StorageManager.saveLoginResult(response.data);
            isRefreshing = false;
            retryQueue.forEach((cb) => cb());
            retryQueue = [];
            return axiosInstance(originalRequest);
          } else {
            throw new Error('Refresh token failed');
          }
        } catch (refreshError) {
          retryQueue.forEach((cb) => cb());
          retryQueue = [];
          isRefreshing = false;
          throw refreshError;
        }
      }
    }
  }
);

return new Promise((resolve, reject) => {
```

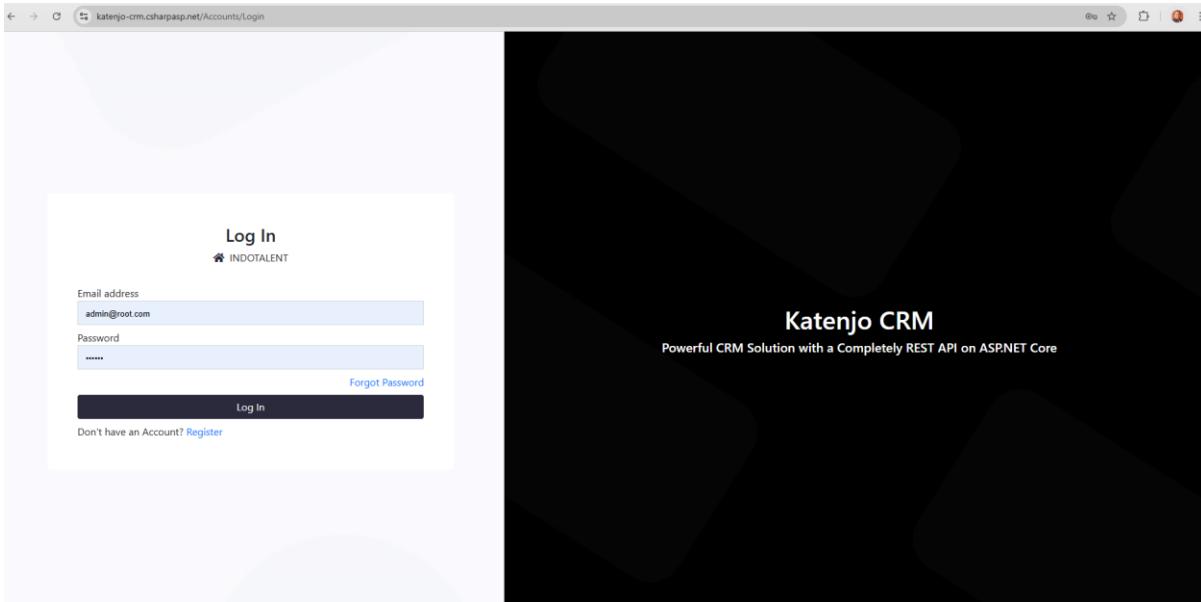
The front end, as the final application interface, serves two primary purposes: providing a user-friendly interface for human users and consuming application features exposed through the Web REST API. JavaScript, powered by Vue, plays a pivotal role in achieving both objectives efficiently. For the user interface, Vue enhances interactivity, enabling the development of a more dynamic and responsive UI. Through features like DOM manipulation, event handling, and animations, Vue helps create an engaging and seamless user experience that feels modern and intuitive.

When it comes to consuming application features via the Web REST API, JavaScript and Vue offer unparalleled flexibility and simplicity. JavaScript is used to create custom libraries that streamline interactions with the Web REST API, such as those built with Axios for handling HTTP requests. For example, a custom Axios library can include interceptors to manage token-based authentication seamlessly. If a JWT token expires, the library can automatically trigger a refresh token request before retrying the original API call. This ensures uninterrupted communication between the front end and back end while maintaining a secure and efficient authentication flow.

Even though the server-side rendering is handled by ASP.NET Core Razor Pages, no direct access to the application layer is allowed. Instead, all application features are accessed exclusively via the Web REST API. This separation enforces a clean architectural boundary and ensures that the same Web REST API can be reused for other front-end implementations, such as native Android or iOS applications. This design demonstrates the flexibility and scalability of the architecture, as it allows the application to evolve beyond a single front-end platform without requiring changes to the underlying back end.

### 3. Functional

#### 3.1 Introduction to CRM



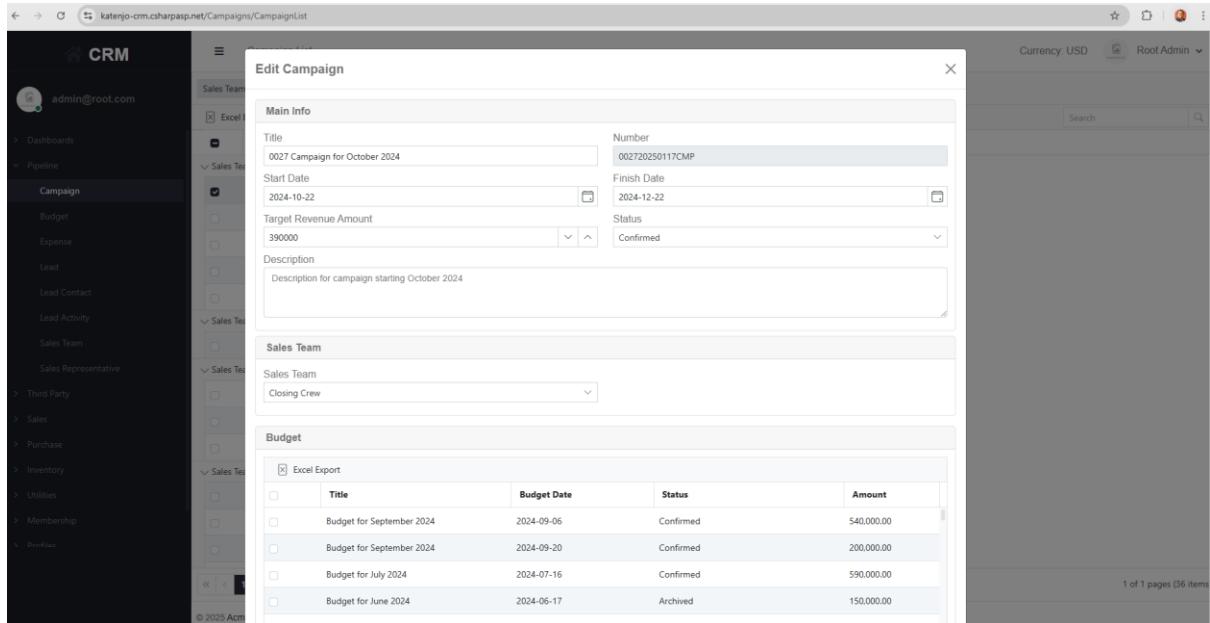
CRM is a full-stack application built using ASP.NET Core. The back end consists of a Web REST API developed with ASP.NET Core utilizing a controller-based approach, while the front end is a web application created with ASP.NET Core Razor Pages. This combination provides a robust architecture, leveraging the strengths of server-side rendering for structured HTML generation and dynamic client-side interactions using JavaScript and Vue. Together, these components create a seamless experience for managing customer relationships and business operations.

The CRM application is designed to meet the essential requirements of efficient customer and business management. It offers a comprehensive set of features grouped into several key modules. The Pipeline Module helps businesses track the progress of potential deals and opportunities, while the Budget and Expense Modules provide tools for financial planning and expense management. The Lead Module is designed to manage and nurture leads effectively, and the Sales Module facilitates customer order and transaction management. The Purchase Module handles supplier orders and procurement processes, while the Inventory Module supports stock tracking and inventory adjustments.

In addition to these core functionalities, the application includes specialized modules for enhanced usability. The Booking Scheduler Module allows users to manage appointments and schedules, while the Program Kanban Module provides a visual workflow tool for managing tasks and projects. These modular components work together to provide a professional-grade solution tailored for businesses requiring comprehensive customer relationship and business management.

## 3.2 Pipeline Modules

### 3.2.1 Campaign



The screenshot shows the 'Edit Campaign' interface in a CRM application. The main form is titled 'Edit Campaign' and contains several sections: 'Main Info', 'Sales Team', and 'Budget'. In the 'Main Info' section, the 'Title' field is populated with '0027 Campaign for October 2024', and the 'Number' field shows '002720250117CMP'. The 'Start Date' is set to '2024-10-22' and the 'Finish Date' is '2024-12-22'. The 'Target Revenue Amount' is '390000' and the 'Status' is 'Confirmed'. The 'Description' field contains the text 'Description for campaign starting October 2024'. The 'Sales Team' section shows a dropdown menu currently set to 'Closing Crew'. The 'Budget' section includes an 'Excel Export' button and a table with four rows of budget data. The table columns are 'Title', 'Budget Date', 'Status', and 'Amount'. The data rows are: 'Budget for September 2024' (Budget Date 2024-09-06, Status Confirmed, Amount 540,000.00), 'Budget for September 2024' (Budget Date 2024-09-20, Status Confirmed, Amount 200,000.00), 'Budget for July 2024' (Budget Date 2024-07-16, Status Confirmed, Amount 590,000.00), and 'Budget for June 2024' (Budget Date 2024-06-17, Status Archived, Amount 150,000.00). The status bar at the bottom right indicates '1 of 1 pages (36 items)'.

The Campaign feature is an integral part of the Pipeline Module. Its primary purpose is to allow businesses to plan and manage campaigns with key details, such as start date, end date, target revenue, and sales team. By centralizing these fields, the system provides a structured approach to organizing campaign data, enabling businesses to effectively monitor and achieve their sales objectives.

This feature also offers quick access to related budget and expense lists, ensuring seamless financial tracking and alignment with campaign goals. By linking campaigns with financial data, businesses can evaluate the effectiveness of their campaigns, optimize resource allocation, and improve ROI. The Campaign functionality empowers businesses to make data-driven decisions and execute marketing efforts that align with their overall sales strategies.

### 3.2.2 Budget

The screenshot shows a CRM application interface. On the left is a sidebar with navigation links like Dashboards, Pipeline, Campaign, and Budget. The main area is titled 'Budget List' and displays a table with columns: Number, Title, Budget Date, Campaign, Amount, Status, and Created At UTC. A modal window titled 'Edit Budget' is open, showing a form with fields: Title (Budget for January 2025), Number (058320250117BUD), Budget Date (2025-01-10), Amount (130.000,00), Campaign (001820250117CMP), Status (Cancelled), and Description (Description for budget on January 2025). Below the modal is a table row for budget 057520250117BUD, which includes the title 'Budget for January 2025', date '2025-01-11', campaign '0035 Campaign for January 2025', amount '790.000,00', status 'Confirmed', and creation date '2025-01-17 07:22'. At the bottom are pagination controls (1-10, 50 items per page) and a footer note.

The Budget feature is another critical component of the Pipeline Module. Its primary purpose is to help businesses manage financial planning effectively by tracking key fields, including budget date, budget amount, a lookup to Campaigns, and status. This modular approach ensures a clear and organized system for budget allocation and monitoring.

The Budget feature allows businesses to evaluate their financial plans in real-time, ensuring they remain aligned with organizational objectives. The status field provides essential updates on whether a budget is draft, cancelled, or confirmed, giving users better control and visibility. By incorporating the Budget feature, businesses can optimize financial management, ensure resource efficiency, and maintain accountability throughout their operations.

### 3.2.3 Expense

The screenshot shows a CRM application interface. On the left, there's a sidebar with navigation links like Dashboards, Pipeline, Campaign, Budget, and various Expense categories (Lead, Lead Contact, Lead Activity, Sales Team, Sales Representative, etc.). The main area is titled 'Expense List' and shows a table of expense entries. A modal window titled 'Edit Expense' is open, displaying form fields for 'Title' (Expense for January 2025), 'Number' (005920250117EXP), 'Expense Date' (2025-01-22), 'Amount' (\$4,000.00), 'Campaign' (002720250117CMP), and 'Status' (Cancelled). The modal has 'Close' and 'Save' buttons. Below the modal, the main table lists other expenses, such as 'Expense for November 2024' and 'Expense for October 2024'. The bottom right corner of the screen displays the text '1 of 2 pages (60 items)'.

The Expense feature is a vital component of the Pipeline Module, designed to provide businesses with detailed tracking and management of financial outflows. With key fields such as date, amount, a lookup to associated Campaigns, and status, the feature ensures a structured approach to expense monitoring. The status field supports states like draft, cancelled, and confirmed, allowing users to manage and track the lifecycle of each expense entry effectively.

This functionality enables businesses to maintain financial transparency by linking expenses directly to campaigns. By doing so, users can gain valuable insights into spending patterns and their impact on campaign performance. The Expense feature empowers businesses to optimize resource utilization, streamline financial tracking, and support data-driven decision-making for sustainable growth.

### 3.2.4 Lead

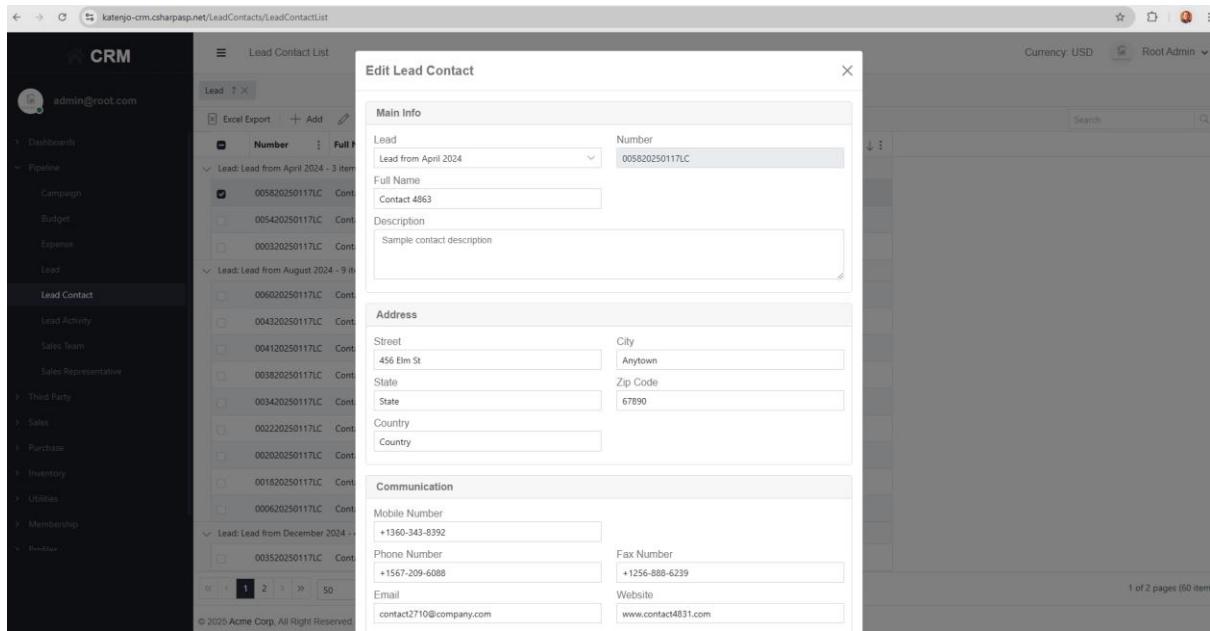
The screenshot shows the CRM application interface. On the left is a dark sidebar with navigation links: Dashboards, Pipeline, Campaign, Budget, Expense, Lead (selected), Lead Contact, Lead Activity, Sales Team, Sales Representative, Third Party, Sales, Purchase, Inventory, Utilities, Membership, and Profiles. The main area has a title bar 'CRM' and a user 'admin@root.com'. Below the title bar is a toolbar with 'Lead List', 'Campaign ↑ X', 'Excel Export', 'Add', and a search bar. A modal window titled 'Edit Lead' is open over the list. The 'Edit Lead' modal contains several sections: 'Main Info' (Title: 'Lead from March 2024', Number: '028120250117LEA', Description: 'Lead description for March 2024'), 'Company Info' (Company Name: 'Company Name 3995', Company Description: 'Sample company description'), 'Company Address' (Street: '123 Main St', City: 'Anytown', State: 'State', Zip Code: '12345'), 'Company Communication' (Phone Number: '+1957-478-7963', Fax Number: '+1391-779-3710', Email: 'Email', Website: 'Website'), and a 'Prospecting' section listing leads with columns: Email, Prospecting Date, Estimated Closing, and Total Score. The table shows 55 leads, with the first few rows visible.

Email	Prospecting Date	Estimated Closing	Total Score
info7851@company.com	2024-03-21	2024-05-25	85
info1375@company.com	2024-12-08	2025-01-20	80
info941@company.com	2024-07-04	2024-09-11	75
info997@company.com	2024-03-25	2024-06-21	70
info844@company.com	2024-03-03	2024-04-13	65
info1120@company.com	2024-03-31	2024-05-28	60
info4887@company.com	2024-10-09	2024-12-22	55
info1111@company.com	2025-01-05	2025-03-27	50
info3776@company.com	2024-06-13	2024-08-19	45
info5055@company.com	2024-10-06	2024-12-16	40
info3219@company.com	2024-04-08	2024-06-26	35
info3549@company.com	2024-09-15	2024-11-09	30
info3102@company.com	2024-12-15	2025-01-18	25
info6307@company.com	2025-01-01	2025-03-29	20

The Lead feature in the Pipeline Module is a powerful tool for managing and nurturing potential business opportunities. Key fields such as title, company name, company description, and complete company address provide a structured foundation for organizing lead information. Communication details, including phone, email, fax, and web, along with social media profiles like WhatsApp, LinkedIn, Instagram, and Facebook, ensure multiple channels are available for effective engagement with leads. These comprehensive data points help businesses establish meaningful connections and improve conversion rates.

A standout aspect of the Lead feature is the incorporation of the BANT scoring methodology—Budget, Need, Authority, and Timeline. This scoring system allows businesses to evaluate the viability and readiness of leads systematically. By assessing a lead's budget capacity, identifying their specific needs, verifying decision-making authority, and understanding their timeline for action, businesses can prioritize high-potential leads efficiently. Additional fields such as target amount and pipeline stage, which progresses from prospecting to closed, further enhance the lead management process. Together, these features enable businesses to align their strategies with customer requirements, streamline sales efforts, and increase the likelihood of successful deals.

### 3.2.5 Lead Contact



The Lead Contact feature in the Pipeline Module serves as a dedicated space for managing all contacts associated with a lead. This feature captures essential details such as full name, complete address, and comprehensive communication information, including email, mobile phone, fax number, and website. By centralizing this data, businesses can maintain accurate and accessible records of individuals linked to each lead, facilitating effective communication and relationship management.

Additionally, the Lead Contact feature supports the integration of social media account information, including WhatsApp, LinkedIn, Twitter, Instagram, and Facebook. This allows businesses to engage with contacts through multiple channels, catering to their preferred modes of communication. By leveraging these capabilities, businesses can build stronger connections, improve lead nurturing processes, and enhance the overall customer experience within the sales pipeline.

### 3.2.6 Sales Team

The screenshot shows a CRM application interface. On the left is a dark sidebar with navigation links like Dashboards, Pipeline, Campaign, Budget, Expense, Lead, Lead Contact, Lead Activity, Sales Team (which is selected), Sales Representative, Third Party, Sales, Purchase, Inventory, Utilities, Membership, and Benefits. The main area is titled "Sales Team List". It displays a table with columns: Name, Description, and Created At UTC. Two rows are visible: "The Persuaders" and "Sales Savants". A modal window titled "Edit Sales Team" is open over the list, showing "Sales Team Info" with fields for Name (set to "Sales Savants") and Description (empty). There are "Close" and "Save" buttons at the bottom of the modal. The status bar at the bottom right says "1 of 1 pages (10 items)".

The Sales Team module in the pipeline serves as a centralized system for managing master data related to sales teams. This feature enables businesses to associate leads or campaigns with specific sales teams, providing a clear structure for organizing and tracking sales efforts. By linking leads and campaigns to their respective teams, organizations gain valuable insights into performance metrics, allowing them to identify which teams contribute the most to overall success.

By leveraging the Sales Team module, businesses can foster healthy competition and motivate their teams to achieve better results. The ability to measure performance across various teams provides a transparent overview, highlighting high achievers and pinpointing areas for improvement. This not only drives accountability but also empowers sales teams to focus on strategies that maximize their impact on company growth.

### 3.2.7 Sales Representative

The screenshot shows the 'Sales Representative List' page within a CRM application. The left sidebar navigation includes 'Dashboards', 'Pipeline' (with sub-options like Campaign, Budget, Expense, Lead, Lead Contact, Lead Activity), 'Sales Team', 'Sales Representative' (selected), 'Third Party', 'Sales', 'Purchase', 'Inventory', 'Utilities', 'Membership', and 'Profiles'. The main content area displays a table of sales representatives with columns for Number, Name, and Created At UTC. A modal window titled 'Edit Sales Representative' is open, showing detailed information for a representative named 'Rep 4 - Closing Crew'. The modal includes fields for Name (Rep 4 - Closing Crew), JobTitle (Sales Representative), EmployeeNumber (EMP-8431), PhoneNumber (+1697-102-7712), EmailAddress (salesrep4@company.com), Sales Team (set to 'Closing Crew'), and Description (Sales Rep for Closing Crew). Buttons for 'Close' and 'Save' are at the bottom right of the modal.

The Sales Representative module within the pipeline is designed to maintain detailed information about individual sales personnel. It includes fields such as **Name**, **Job Title**, **Employee Number**, **Phone Number**, and **Email Address**, ensuring that all critical data about each representative is stored in one centralized location. Additionally, the module features a **Sales Team lookup**, allowing each sales representative to be associated with a specific sales team, which enhances organization and accountability across the pipeline.

By incorporating detailed records of sales representatives, businesses can easily manage their workforce and track individual contributions to leads and campaigns. The integration with sales teams provides clarity on team compositions and ensures that each representative's efforts are correctly attributed. This organized approach fosters better collaboration, improves communication, and enables precise tracking of performance metrics, contributing to the overall efficiency and success of the sales pipeline.

## 3.3 Third Party Modules

### 3.3.1 Customer Group

Name	Description	Created At UTC
Education		2025-01-17 07:21
Foundation		2025-01-17 07:21
Military		
Government		
Hospitality		
Corporate		

The Customer Group feature is an integral part of the Sales Module. Its primary purpose is to allow businesses to categorize customers into specific groups, such as Military, Government, Hospitality, Foundation, Education, and Corporate. By grouping customers in this way, the system provides a structured approach to managing customer data, enabling businesses to better organize and analyze their customer base.

This grouping is especially beneficial when creating customer master data. Assigning customers to predefined groups ensures that relevant insights can be gained during data analysis, particularly for sales trends, performance reports, and targeted marketing strategies. The Customer Group functionality empowers businesses to make data-driven decisions and tailor their approach to meet the unique needs of each customer segment.

### 3.3.2 Customer Category

The screenshot shows a CRM application interface. On the left is a sidebar with navigation links like Dashboards, Pipeline, Third Party, Customer Group, Customer Category, Customer, Customer Contact, Vendor Group, Vendor Category, Vendor, Vendor Contact, Sales, Purchase, Inventory, Utilities, Membership, and Profile. The main area has a title 'Customer Category List' and a table with columns Name, Description, and Created At UTC. The table contains five rows: Medium (Created 2025-01-17 07:21), Startup (Created 2025-01-17 07:21), Micro (Created 2025-01-17 07:21), Small (Created 2025-01-17 07:21), and Enterprise (Created 2025-01-17 07:21). A modal window titled 'Edit Customer Category' is open over the list, showing a form with 'Main Info' section containing fields for Name (Startup) and Description (empty). There are 'Close' and 'Save' buttons at the bottom of the modal. The footer of the page includes copyright information: © 2025 Acme Corp. All Right Reserved.

The concept of Customer Category, as part of the sales module, provides the ability to categorize customers based on their specific interests or characteristics. This categorization can be customized to suit the business's needs, with examples such as Startup, Small, Medium, Micro, and Enterprise. Similar to Customer Groups, Customer Categories play a vital role during the creation of master customer data, enabling businesses to analyze their customer base more effectively. By classifying customers into distinct categories, companies can better understand their target market, optimize their sales strategies, and deliver tailored products or services that align with the specific needs of each category. This categorization system will also assist in targeted marketing and forecasting, enhancing overall decision-making.

### 3.3.3 Customer

The screenshot shows a CRM application with a dark-themed sidebar on the left containing various navigation links such as Dashboards, Pipeline, Third Party, Customer Group, Customer Category, Customer, Customer Contact, Vendor Group, Vendor Category, Vendor, Vendor Contact, Sales, Purchase, Inventory, Utilities, Membership, and Details. The main area has a title 'Customer List' and a sub-section 'Category'. A modal window titled 'Edit Customer' is open, showing a form with sections for Main Info, Address, Communication, and Social Media. The Main Info section includes fields for Name (Grandeur LLC), Number (001820250117CST), Customer Group (Education), Customer Category (Enterprise), and Description. The Address section includes fields for Street (Main St), City (San Francisco), State (NY), Zip Code (60601), and Country (Enter Country). The Communication section includes fields for Phone Number (555-8765), Fax Number (Enter Fax Number), Email (grandeur@demo.com), Website (Enter Website), and Social Media (Facebook, LinkedIn, Twitter, YouTube, Instagram, etc.). To the right of the modal is a table listing 20 customer entries with columns for Email and Created At UTC.

Email	Created At UTC
right@example.com	2025-01-17 07:21
grandeur@demo.com	2025-01-17 07:21
axe@test.com	2025-01-17 07:21
prosperity@demo.com	2025-01-17 07:21
sipitof@test.com	2025-01-17 07:21
pho@example.com	2025-01-17 07:21
field@example.com	2025-01-17 07:21
axis@demo.com	2025-01-17 07:21
unset@example.com	2025-01-17 07:21
ivity@test.com	2025-01-17 07:21
dederal@test.com	2025-01-17 07:21
renemy@demo.com	2025-01-17 07:21
lobal@test.com	2025-01-17 07:21
	1 of 1 pages (20 item)

Customers are a crucial component of the sales module, and the primary objective of the customer feature is to create a well-structured master customer database. By ensuring that customer data is collected in an organized manner, businesses can maximize the utility of this data for future analysis and decision-making. Key information from related features, such as Customer Groups and Customer Categories, can be incorporated into the master customer record, helping to classify and better understand each customer's profile. This comprehensive approach ensures that businesses have a solid foundation for managing customer relationships.

The master customer data can also be used to record essential customer details, such as full address information, including street, city, state, zip code, and country. Additionally, it allows businesses to capture communication details, including phone numbers, email addresses, and social media accounts. This information is vital for effective customer engagement and communication, enabling businesses to stay connected with their customers through the preferred channels. By maintaining accurate and detailed customer records, companies can enhance customer service, streamline processes, and foster stronger customer relationships.

### 3.3.4 Customer Contact

The screenshot shows the CRM application interface. On the left is a sidebar with navigation links for Dashboards, Pipeline, Third Party, Customer Group, Customer Category, Customer, Customer Contact (which is selected), Vendor Group, Vendor Category, Vendor, Vendor Contact, Sales, Purchase, Inventory, Utilities, Membership, and Profiles. The main area is titled "Customer Contact List". It displays a table with columns: Number, Name, Job Title, Phone, Email, and Created At UTC. A modal window titled "Edit Customer Contact" is open, showing fields for Main Info: Name (Lauren Martin), Number (001420250117CC), Phone Number (+1-936-699-5593), Email Address (lauren.martin@gmail.com), Job Title (Quality Assurance Tester), and Customer (Alpha LLC). There is also a Description field and a note indicating the record was created on 5-01-17 07:21. At the bottom of the modal are "Close" and "Save" buttons. Below the table, there are pagination controls (page 1 of 2) and a note about 1 of 2 pages (50 items).

Customer Contact is a key feature within the sales module, primarily designed to record all contact persons associated with a specific customer. This functionality helps streamline customer relationship management by maintaining a clear record of who the primary contacts are for each customer. It ensures that businesses can easily access the necessary information when they need to reach out to the right individuals, whether for sales inquiries, support requests, or other business matters.

By utilizing the Customer Contact feature, organizations gain a better understanding of the responsible parties for each customer, which improves communication efficiency. This becomes especially valuable when managing multiple accounts, as it eliminates confusion regarding the main point of contact. With this feature, sales and customer service teams can quickly identify the appropriate person to contact, ensuring smoother interactions and more effective problem-solving, ultimately enhancing the overall customer experience.

### 3.3.5 Vendor Group

The screenshot shows a CRM application interface. On the left is a sidebar with various menu items like Dashboards, Pipeline, Third Party, Customer Group, Customer Category, Customer, Customer Contact, Vendor Group (which is selected), Vendor Category, Vendor, Vendor Contact, Sales, Purchase, Inventory, Utilities, Membership, and Vendor. The main area is titled 'Vendor Group List' and contains a table with the following data:

Name	Description	Created At UTC
Distributor		2025-01-17 07:21
Service Provider		2025-01-17 07:21
Supplier		
Freelancer		
Manufacturer		

A modal window titled 'Edit Vendor Group' is open over the table, showing the 'Main Info' section with the following fields:

- Name: Service Provider
- Description: (empty text area)

At the bottom of the modal are 'Close' and 'Save' buttons.

The Vendor Group feature is a crucial component of the procurement module. Its main function is to categorize vendors into specific groups, such as Freelancer, Service Provider, Distributor, Supplier, and Manufacturer. By grouping vendors in this way, the system helps businesses manage vendor data more efficiently, providing a clear structure for organizing and analyzing their vendor relationships. This feature enables businesses to streamline vendor management and improve procurement processes.

Similar to customer grouping, categorizing vendors into predefined groups is particularly useful when creating vendor master data. It allows businesses to gain valuable insights during data analysis, such as evaluating vendor performance, optimizing purchasing decisions, and identifying opportunities for cost reduction. The Vendor Group functionality ensures that businesses can make informed, strategic decisions that align with their procurement goals and meet the specific needs of each vendor category.

### 3.3.6 Vendor Category

The screenshot shows a CRM application interface. On the left is a sidebar with navigation links like Dashboards, Pipeline, Third Party, Customer Group, Customer Category, Customer, Customer Contact, Vendor Group, Vendor Category (which is selected), Vendor, Vendor Contact, Sales, Purchase, Inventory, Utilities, Membership, and Bi-Valuer. The main area is titled "Vendor Category List" and contains a table with columns: Name, Description, and Created At UTC. A row for "Local" is selected. A modal window titled "Edit Vendor Category" is open, showing a "Main Info" section with fields for Name (Local) and Description, along with "Close" and "Save" buttons. At the bottom of the page, there's a footer with copyright information and a page number.

Name	Description	Created At UTC
Local		2025-01-17 07:21
Specialty		2025-01-17 07:21
Global		
Small		
Medium		
Large		

The concept of Vendor Category, as part of the procurement module, allows businesses to categorize their vendors based on specific characteristics or operational scale. This categorization can be customized to fit the needs of the organization, with examples such as Small, Local, Medium, Global, and Large. Similar to Vendor Groups, Vendor Categories are essential when creating vendor master data, as they provide businesses with the ability to analyze and manage their vendor relationships more efficiently. By organizing vendors into distinct categories, companies can better understand the range of suppliers they work with and tailor their procurement strategies accordingly.

Categorizing vendors in this way also helps in strategic decision-making, as it enables businesses to evaluate their vendors based on size, reach, or geographic focus. This classification system allows companies to assess vendor performance, streamline purchasing processes, and identify opportunities for cost optimization or diversification. By grouping vendors into relevant categories, businesses can also enhance forecasting, risk management, and vendor negotiations, leading to improved overall procurement outcomes.

### 3.3.7 Vendor

The screenshot shows a CRM application interface for managing vendors. On the left, there's a sidebar with various navigation links like Dashboards, Pipeline, Third Party, Customer Group, Customer Category, Customer, Customer Contact, Vendor Group, Vendor Category, Vendor (selected), Vendor Contact, Sales, Purchase, Inventory, Utilities, Membership, and Review. The main area has tabs for Vendor List and Vendor Detail. A modal window titled 'Edit Vendor' is open, showing fields for Main Info (Name: Infinity Holdings, Number: 001920250117VND, Vendor Group: Supplier, Vendor Category: Global), Address (Street: Elm Street, City: New York, State: IL, Zip Code: 90001), Communication (Phone Number: 987-654-3210, Fax Number: Enter Fax Number, Email: vendor2@example.com, Website: Enter Website), and Social Media. In the background, a table lists vendor details such as email, created at UTC, and vendor ID. The table shows 20 items across 1 page.

Vendors are a vital component of the procurement module, and the primary objective of the vendor feature is to create a well-structured master vendor database. By ensuring that vendor data is collected in an organized manner, businesses can fully utilize this data for future analysis and decision-making. Essential information from related features, such as Vendor Groups and Vendor Categories, can be integrated into the master vendor record, helping to classify and better understand each vendor's profile. This comprehensive approach ensures that businesses have a solid foundation for managing vendor relationships effectively.

The master vendor data can also be used to record essential vendor details, such as full address information, including street, city, state, zip code, and country. Additionally, it allows businesses to capture communication details, such as phone numbers, email addresses, and social media accounts. This information is crucial for efficient vendor engagement and communication, enabling businesses to stay connected with their vendors through preferred channels. By maintaining accurate and detailed vendor records, companies can enhance procurement processes, streamline operations, and build stronger vendor partnerships.

### 3.3.8 Vendor Contact

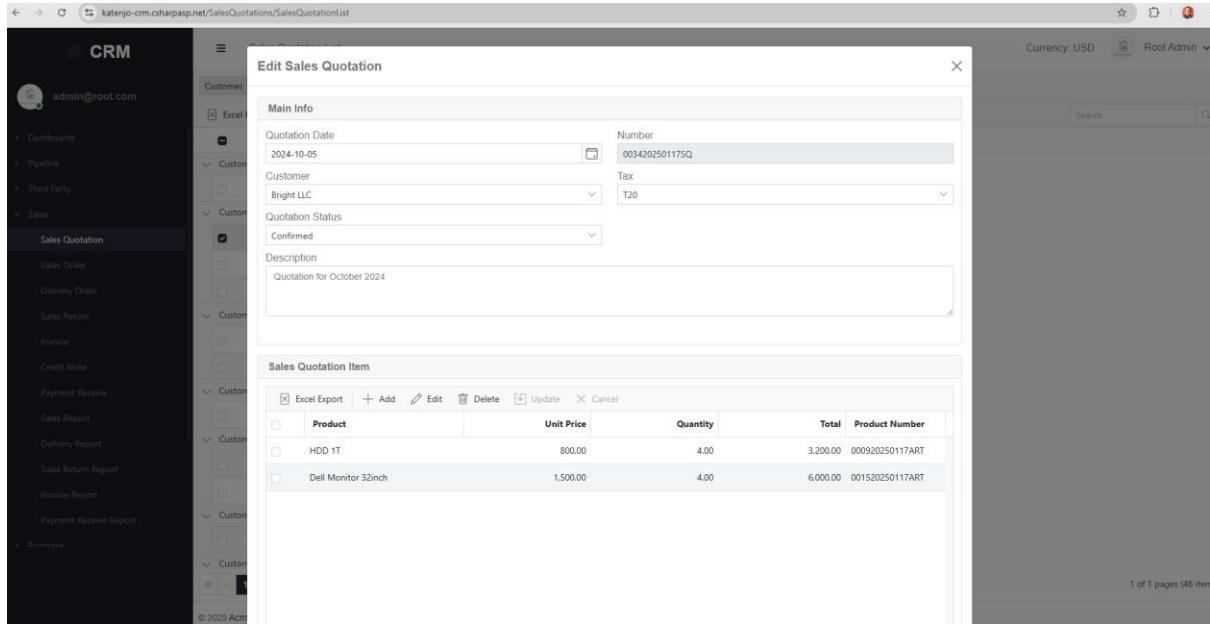
The screenshot shows a CRM interface with a sidebar navigation on the left. The main area displays a 'Vendor Contact List' with a grid of contacts. A modal window titled 'Edit Vendor Contact' is overlaid on the list, showing detailed information for a specific contact. The modal has tabs for 'Main Info' and 'Description'. The 'Main Info' tab contains fields for Name (Lauren White), Number (001720250117VC), PhoneNumber (+1-788-914-7655), EmailAddress (lauren.white@gmail.com), JobTitle (Operations Manager), and Vendor (Apex Ventures). The 'Description' tab is empty. At the bottom of the modal are 'Close' and 'Save' buttons. The main list below shows other vendor entries like 'Vendor: Aurora Holdings - 3 items' and 'Vendor: Cascade Enterprises - 3 items'. The bottom right corner of the screen shows '1 of 2 pages (60 items)'.

Vendor Contact is a key feature within the procurement module, primarily designed to record all contact persons associated with a specific vendor. This functionality helps streamline vendor management by maintaining a clear record of who the primary contacts are for each vendor. It ensures that businesses can easily access the necessary information when they need to reach out to the right individuals, whether for procurement inquiries, contract negotiations, or other vendor-related matters.

By utilizing the Vendor Contact feature, organizations gain a better understanding of the responsible parties for each vendor, which improves communication efficiency. This becomes especially valuable when managing multiple suppliers, as it eliminates confusion regarding the main point of contact. With this feature, procurement teams can quickly identify the appropriate person to contact, ensuring smoother interactions, faster decision-making, and more effective problem-solving, ultimately enhancing the overall vendor relationship and procurement process.

## 3.4 Sales Modules

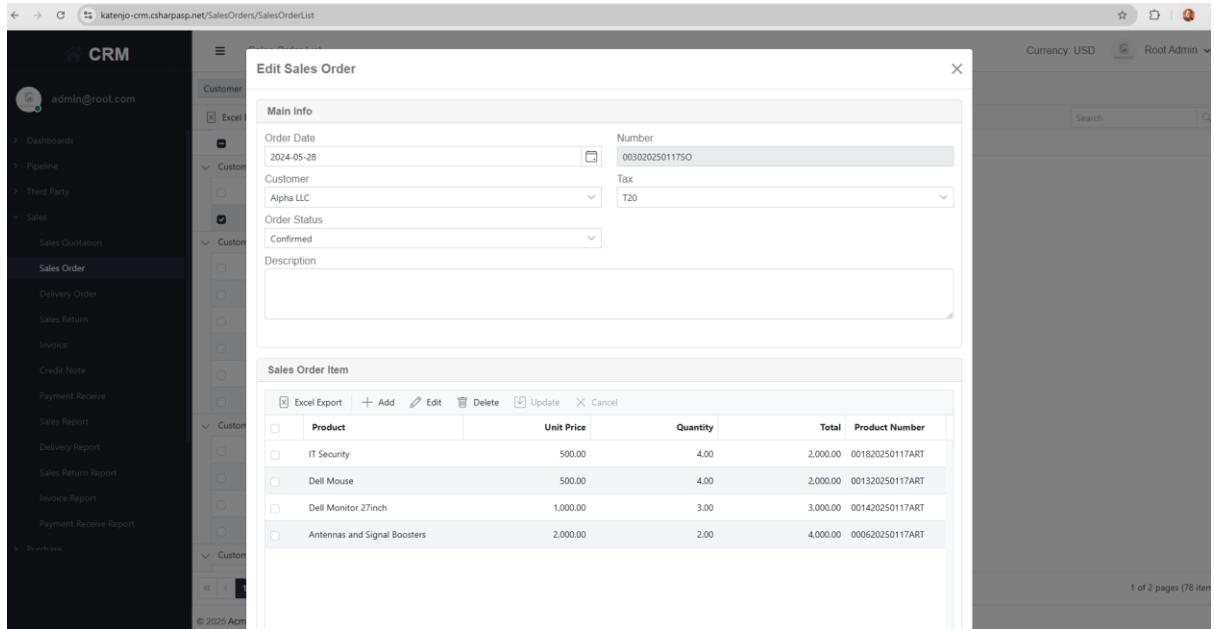
### 3.4.1 Sales Quotation



The Sales Quotation module in the Sales system is a critical tool for managing customer quotations efficiently. It includes fields such as **Quotation Date**, **Customer**, **Tax**, and **Quotation Status**, which can be set to values like **Draft**, **Cancelled**, **Confirmed**, or **Ordered**. This module provides a structured workflow for generating and managing quotations, ensuring that businesses can offer accurate pricing to customers while maintaining clear visibility into the status of each quotation throughout its lifecycle.

A key feature of this module is the **Sales Quotation Item detail**, where users can select products, specify quantities, and define unit prices. This allows for the creation of comprehensive and precise quotations tailored to customer needs. The ability to include multiple products with specific details ensures transparency in pricing, improves customer trust, and simplifies the transition from quotation to order processing. By leveraging this module, businesses can streamline their sales processes, enhance customer satisfaction, and boost operational efficiency.

### 3.4.2 Sales Order



Sales Order is an essential component of the sales module, designed to facilitate the creation of customer orders. The primary function of this feature is to capture vital information such as the customer details, order status, and tax information. This helps ensure that all relevant order data is properly recorded and accessible. Sales orders can be efficiently created, with the ability to easily input a variety of items, including product descriptions, quantities, and prices, making the process streamlined and user-friendly.

Once the sales order is completed, it can be generated into a PDF format, allowing businesses to create a hard copy of the order for physical documentation or customer distribution. This feature simplifies the sales process by providing a reliable and consistent method for managing customer orders, ensuring that both the sales team and customers have access to accurate and up-to-date order details. It also enhances operational efficiency by reducing the need for manual record-keeping and providing a standardized format for all sales orders.

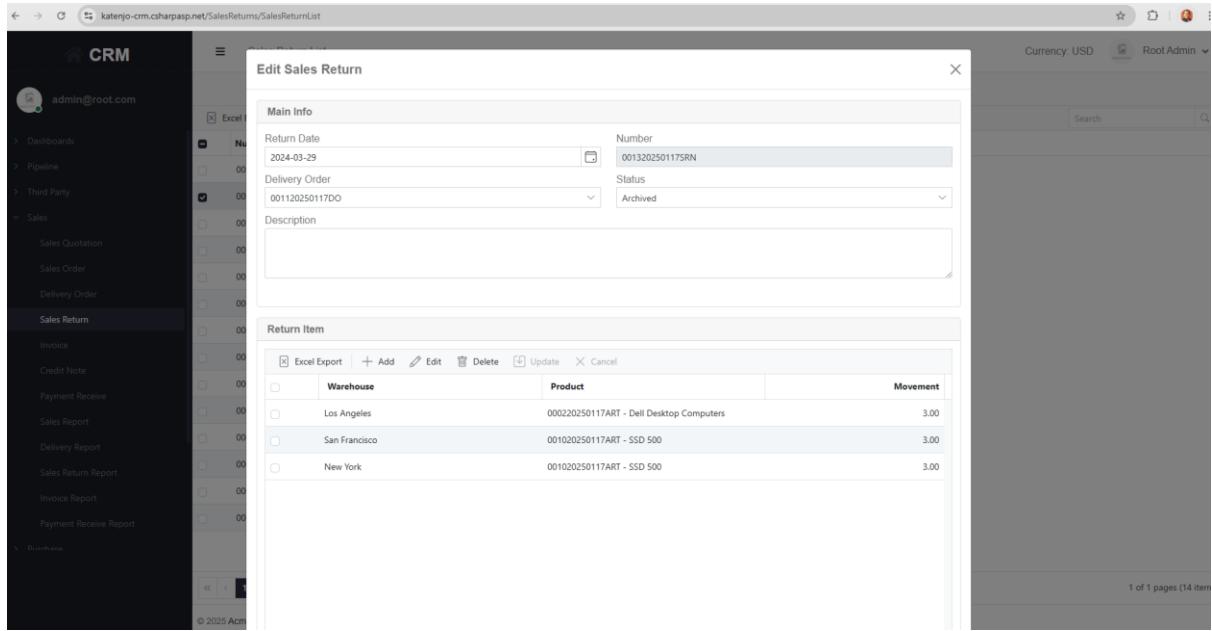
### 3.4.3 Delivery Order

Warehouse	Product	Movement
Chicago	000920250117ART - HDD 1T	2.00
New York	00120250117ART - Dell Keyboard	3.00
San Francisco	001420250117ART - Dell Monitor 27inch	4.00
New York	001620250117ART - Dell Webcams	3.00

The Delivery Order feature within the inventory module is designed to manage the process of delivering products to customers after a sales order has been placed. Once a customer places an order, the internal team follows up by creating a Delivery Order document, using the sales order as a reference. This ensures that the delivery process is closely tied to the original sales order, allowing businesses to efficiently track the movement of goods from order to shipment. The Delivery Order feature captures essential information, such as the sales order number and the warehouse responsible for fulfilling the delivery, helping to streamline the order fulfillment process.

By recording the sales order and the associated warehouse in the Delivery Order, businesses can ensure that the correct products are selected from the appropriate warehouse for shipment to the customer. This functionality helps maintain accurate inventory records and improves operational efficiency by ensuring that products are dispatched in a timely manner. It also provides a clear connection between sales orders and the corresponding delivery process, making it easier for businesses to manage their logistics, monitor delivery progress, and maintain accurate stock levels throughout the order fulfillment cycle.

### 3.4.4 Sales Return



The Sales Return feature within the inventory module is designed to handle product returns from customers, allowing businesses to efficiently process returns and maintain accurate inventory records. The typical flow begins when a customer places an order, which is recorded in the Sales Order. The next step involves the internal team, often the warehouse team, creating a Delivery Order based on the sales order, referencing the specific sales order to ensure the correct products are delivered. A crucial aspect of the Delivery Order is identifying which warehouse will be responsible for dispatching the products to the customer. This clear process ensures that all relevant details, including product quantities and shipping locations, are documented.

However, after receiving the products, there may be instances where the customer returns items due to reasons such as defects or discrepancies in the order. In these cases, the Sales Return functionality comes into play. The internal team, typically the warehouse operations team, creates a Sales Return document to record the returned products. This document serves as a formal record of the products being returned to the company and provides crucial information about the return process, including the delivery order number as a reference and which warehouse will be responsible for receiving the returned products.

By accurately capturing the delivery order reference and identifying the warehouse receiving the returned products, businesses can ensure smooth processing of returns and make the necessary inventory adjustments. This feature also allows businesses to track returned items, monitor reasons for returns, and improve customer satisfaction by addressing product issues or discrepancies. Overall, the Sales Return functionality plays a vital role in maintaining operational efficiency and ensuring that both customer needs and inventory accuracy are met.

### 3.4.5 Invoice

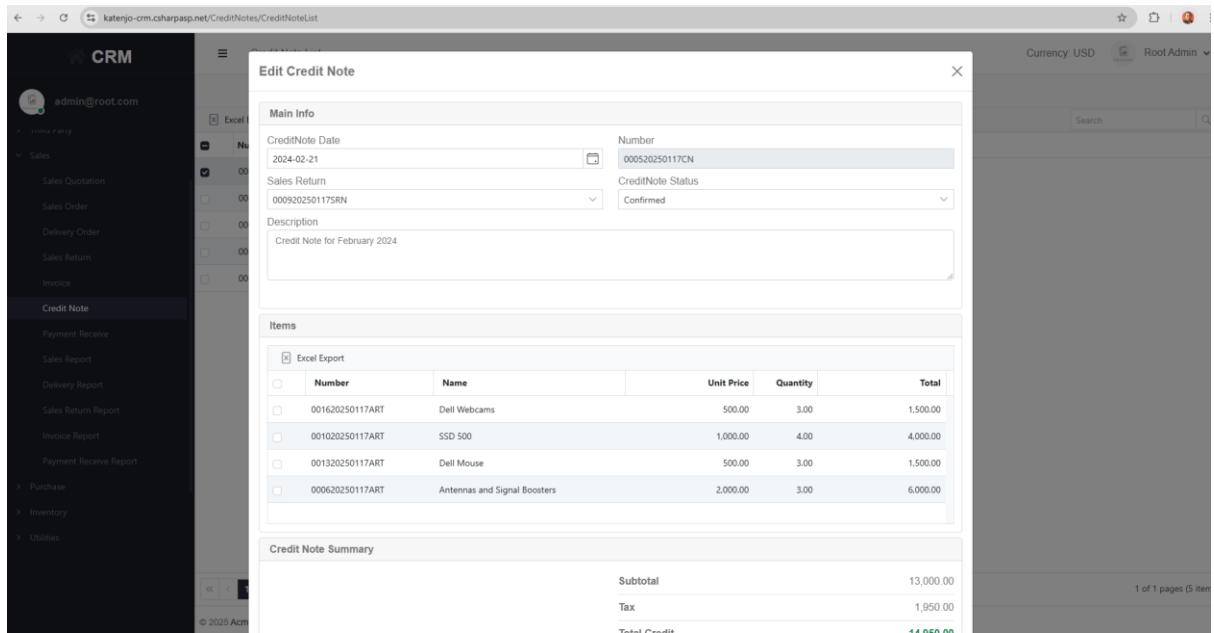
The screenshot shows the CRM application interface with the 'Edit Invoice' dialog box open. The left sidebar contains a navigation menu with categories like Sales, Delivery Order, Sales Return, and Invoice. The 'Invoice' category is currently selected. The main area displays the 'Edit Invoice' form. The 'Main Info' section includes fields for 'Invoice Date' (set to 2024-09-08), 'Number' (004520250117INV), 'Sales Order' (005920250117SO), and 'Invoice Status' (Cancelled). The 'Description' field contains the text 'Invoice for September 2024'. The 'Items' section shows a table with four items: Dell Monitor 27inch, Dell Keyboard, Dell Servers, and Dell Webcams, each with its number, name, unit price, quantity, and total amount. The 'Invoice Summary' section at the bottom provides a breakdown of the subtotal (21,800.00) and tax (3,270.00). The status bar at the bottom right indicates '1 of 1 pages (45 item)'.

Number	Name	Unit Price	Quantity	Total
001420250117ART	Dell Monitor 27inch	1,000.00	3.00	3,000.00
001220250117ART	Dell Keyboard	700.00	4.00	2,800.00
000120250117ART	Dell Servers	5,000.00	3.00	15,000.00
001620250117ART	Dell Webcams	500.00	2.00	1,000.00

The Invoice module in the Sales system is a vital component for managing billing and payment processes. It includes fields such as **Invoice Date**, **Sales Order Lookup**, and **Invoice Status**, which can be set to **Draft**, **Cancelled**, **Partial Paid**, or **Full Paid**, providing a clear overview of the invoice lifecycle. This module ensures seamless integration with sales orders, enabling businesses to efficiently generate invoices based on prior agreements and maintain consistency in their financial records.

Each invoice includes an **Items** section where users can input details such as **Number**, **Name**, **Unit Price**, **Quantity**, and **Total** for each product or service. At the bottom of the form, the system automatically calculates **Subtotal**, **Tax**, and **Total Amount**, ensuring accuracy and eliminating manual errors. This structured approach simplifies the invoicing process, provides clarity to customers, and enhances overall financial management by enabling precise tracking of payments and outstanding balances.

### 3.4.6 Credit Note



The Credit Note module in the Sales system is designed to manage adjustments to invoices as a follow-up to sales returns. It serves as an official document issued to customers to reflect a reduction in the invoiced amount, ensuring transparency and accuracy in financial transactions. Key fields include **Credit Note Date**, a **Sales Return Lookup** to associate the credit note with the corresponding return, and **Credit Note Status**, which can be set to **Draft**, **Confirmed**, or **Cancelled**, providing a clear workflow for credit note management.

This module also supports scenarios where the credit note is used as documentation for processing customer refunds. By linking the credit note to the sales return, businesses can maintain a traceable record of transactions, enhancing accountability. The structured status updates ensure that every credit note reflects its current stage, reducing errors and improving operational efficiency. This streamlined process not only reinforces customer trust but also simplifies reconciliation in the accounting system.

### 3.4.7 Payment Receive

The screenshot displays the 'Edit Payment Receive' dialog box within a CRM application. The 'Main Info' section includes fields for Payment Receive Date (2024-07-25), Number (002820250117PYRC), Invoice (002020250117INV), Payment Method (Cash), and Amount Received (21620). The 'Description' field contains the note 'Payment Received on July 2024'. The 'Items' section lists purchased goods with their details: WiFi, Dell Laptops, Dell Monitor 32inch, Network Cables, and Dell Desktop Computers. The 'Invoice Summary' section shows a Subtotal of 18,800.00. The sidebar on the left provides navigation through various sales and payment-related reports.

The Payment Receive module in the Sales system is essential for recording customer payments against specific invoices. It ensures a seamless process by allowing users to associate payments with the relevant invoice through the **Invoice Lookup** field. Other key fields include **Payment Receive Date** for tracking the payment timeline and a **Payment Method Lookup**, which offers various options such as **Cash, Bank Transfer, Credit Card, Debit Card, and PayPal**. The module also includes a **Payment Receive Status** that can be set to **Draft, Cancelled, or Confirmed**, providing a structured approach to managing payment records.

Additionally, the module captures the **Amount Received**, enabling accurate tracking of partial or full payments made by customers. This streamlined functionality helps businesses monitor outstanding balances and ensures proper reconciliation with the invoice. By leveraging this module, companies can maintain transparency in their financial dealings, improve cash flow management, and build stronger customer relationships by promptly updating payment statuses.

### 3.4.8 Sales Report

The screenshot shows the Sales Report List page in a CRM application. The left sidebar has a navigation menu with items like Dashboards, Pipeline, Third Party, Sales (Sales Quotation, Sales Order, Delivery Order, Sales Return, Invoice, Credit Note, Payment Receive), Sales Report (Delivery Report, Sales Return Report, Invoice Report, Payment Receive Report), and Purchases. The Sales Report item is currently selected. The main content area is titled "Sales Report List" and shows a grid of sales order details. The grid has columns for Customer, Product Number, Product Name, Unit Price, Quantity, Total, and Created At UTC. The grid is organized by Sales Order number, with sub-totals for each group: Total: 10,800.00, Total: 9,500.00, Total: 12,960.00, and Total: 8,600.00. The bottom of the page shows pagination and a note: "© 2025 Acme Corp. All Right Reserved." and "1 of 7 pages (315 items)".

SalesOrder	Customer	Product Number	Product Name	Unit Price	Quantity	Total	Created At UTC
SalesOrder: 007820250117SO - 3 items	Statewide LLC	001120250117ART	SSD 1T	1,500.00	4	6,000.00	2025-01-17 07:21
	Statewide LLC	001220250117ART	Dell Keyboard	700.00	4	2,800.00	2025-01-17 07:21
	Statewide LLC	001020250117ART	SSD 500	1,000.00	2	2,000.00	2025-01-17 07:21
SalesOrder: 007720250117SO - 3 items	Hope LLC	001820250117ART	IT Security	500.00	4	2,000.00	2025-01-17 07:21
	Hope LLC	001820250117ART	IT Security	500.00	3	1,500.00	2025-01-17 07:21
	Hope LLC	000620250117ART	Antennas and Signal Boosters	2,000.00	3	6,000.00	2025-01-17 07:21
SalesOrder: 007620250117SO - 4 items	Luxe LLC	000220250117ART	Dell Desktop Computers	2,000.00	4	8,000.00	2025-01-17 07:21
	Luxe LLC	001020250117ART	SSD 500	1,000.00	4	4,000.00	2025-01-17 07:21
	Luxe LLC	001320250117ART	Dell Mouse	500.00	2	1,000.00	2025-01-17 07:21
	Luxe LLC	001920250117ART	Discount	-10.00	4	-40.00	2025-01-17 07:21
SalesOrder: 007520250117SO - 4 items	Statewide LLC	000920250117ART	HDD 1T	800.00	2	1,600.00	2025-01-17 07:21
	Statewide LLC	001620250117ART	Dell Webcams	500.00	4	2,000.00	2025-01-17 07:21

Sales Report is a key feature within the sales module, designed to display sales data in a grid format. The report groups the information by sales order number, making it easy to track and analyze multiple orders at once. Below each group, the order details are displayed, providing a clear and concise view of the sales activities. This organization allows users to quickly identify relevant information without having to navigate through complex data sets, improving efficiency and accuracy.

Additionally, the grid format can be downloaded as an Excel file, enabling users to perform more in-depth analysis or generate custom reports. This feature allows businesses to easily export sales data for further examination, offering flexibility for reporting and decision-making processes. By providing the ability to download and manipulate the data, the sales report feature supports better insights into sales performance, trends, and areas for improvement.

### 3.4.9 Delivery Report

SalesOrder	Customer	Warehouse	Product Number	Product Name	Quantity	Created At UTC
005920250117DO - 3 items					Total: 11.00	
00542025011750	Armada LLC	New York	001120250117ART	SSD 1T	3	2025-01-17 07:21
00642025011750	Armada LLC	New York	001620250117ART	Dell Webcams	4	2025-01-17 07:21
00642025011750	Armada LLC	San Francisco	001220250117ART	Dell Keyboard	4	2025-01-17 07:21
005820250117DO - 4 items					Total: 14.00	
00462025011750	Bright LLC	Los Angeles	001220250117ART	Dell Keyboard	4	2025-01-17 07:21
00462025011750	Bright LLC	New York	001220250117ART	Dell Keyboard	3	2025-01-17 07:21
00462025011750	Bright LLC	New York	001320250117ART	Dell Mouse	4	2025-01-17 07:21
00462025011750	Bright LLC	Los Angeles	000820250117ART	HDD 500	3	2025-01-17 07:21
005720250117DO - 4 items					Total: 12.00	
00722025011750	Global LLC	Chicago	000920250117ART	HDD 1T	2	2025-01-17 07:21
00722025011750	Global LLC	New York	001220250117ART	Dell Keyboard	3	2025-01-17 07:21
00722025011750	Global LLC	San Francisco	001420250117ART	Dell Monitor 27inch	4	2025-01-17 07:21
00722025011750	Global LLC	New York	001620250117ART	Dell Webcams	3	2025-01-17 07:21
005620250117DO - 4 items					Total: 14.00	
00062025011750	Grandeur LLC	San Francisco	001220250117ART	Dell Keyboard	2	2025-01-17 07:21

The Delivery Order Report is a key feature within the sales module, designed to display delivery data in a structured grid format. The report organizes information by **Sales Order**, making it simple to track and analyze deliveries related to specific orders. For each sales order, details such as **Customer**, **Warehouse**, **Product**, and **Quantity** are displayed, providing a comprehensive overview of delivery activities. This clear organization enables users to quickly find relevant information, minimizing the time spent navigating through extensive data and improving operational efficiency.

Additionally, the report can be exported as an Excel file, giving users the flexibility to conduct in-depth analyses or create custom reports. This capability allows businesses to further examine delivery performance, track trends, and identify areas for improvement in their logistics processes. By offering an intuitive and exportable report, the Delivery Order Report supports better decision-making and enhances visibility into the overall efficiency of order fulfillment operations.

### 3.4.10 Sales Return Report

Delivery Order	Customer	Warehouse	Product Number	Product Name	Quantity	Created At UTC
SalesReturn: 001420250117SRN - 2 items						
005420250117DO	Sunset LLC	Chicago	001620250117ART	Dell Webcams	4	2025-01-17 07:21
005420250117DO	Sunset LLC	Los Angeles	001020250117ART	SSD 500	3	2025-01-17 07:21
SalesReturn: 001320250117SRN - 3 items						
001120250117DO	Oasis LLC	Los Angeles	000220250117ART	Dell Desktop Computers	3	2025-01-17 07:21
001120250117DO	Oasis LLC	San Francisco	001020250117ART	SSD 500	3	2025-01-17 07:21
001120250117DO	Oasis LLC	New York	001020250117ART	SSD 500	3	2025-01-17 07:21
SalesReturn: 001220250117SRN - 3 items						
001320250117DO	Citadel LLC	New York	001020250117ART	SSD 500	3	2025-01-17 07:21
001320250117DO	Citadel LLC	Los Angeles	000720250117ART	Wifi	2	2025-01-17 07:21
001320250117DO	Citadel LLC	Los Angeles	001220250117ART	Dell Keyboard	4	2025-01-17 07:21
SalesReturn: 001120250117SRN - 5 items						
002220250117DO	Harmony LLC	New York	000120250117ART	Dell Servers	3	2025-01-17 07:21
002220250117DO	Harmony LLC	New York	000420250117ART	Network Cables	2	2025-01-17 07:21
002220250117DO	Harmony LLC	Los Angeles	001120250117ART	SSD 1T	3	2025-01-17 07:21
002220250117DO	Harmony LLC	New York	000920250117ART	HDD 1T	4	2025-01-17 07:21

Items per page: 50 | Page: 1 of 1 pages (46 items)

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The Sales Return Report is a key feature within the sales module, designed to present return data in a structured grid format. The report organizes information by **Delivery Order**, making it easy to track and analyze returns associated with specific deliveries. For each delivery order, details such as **Customer**, **Warehouse**, **Product**, and **Quantity** are displayed, offering a comprehensive overview of sales return activities. This structured layout ensures that users can quickly locate relevant information, streamlining the process of managing and analyzing sales returns.

Furthermore, the report can be exported as an Excel file, enabling users to perform deeper analysis or create tailored reports. This functionality allows businesses to gain insights into return trends, assess the impact of returns on inventory and sales performance, and identify potential issues in product quality or delivery processes. By providing an accessible and exportable report, the Sales Return Report supports informed decision-making and enhances operational efficiency in handling returned items.

### 3.4.11 Invoice Report

Customer	Number	Invoice Date	Sales Order	Total Amount	Status	Created At UTC
Customer: Unity LLC - 2 items				<b>Total: 24,780.00</b>		
	003920250117INV	2024-08-29T00:00:00	000420250117SO	16,100.00	Confirmed	2025-01-17 07:23
	001220250117INV	2024-03-17T00:00:00	000220250117SO	8,680.00	Cancelled	2025-01-17 07:23
Customer: Sunset LLC - 4 items				<b>Total: 60,804.00</b>		
	000120250117INV	2024-01-19T00:00:00	000320250117SO	19,680.00	Draft	2025-01-17 07:23
	002220250117INV	2024-05-14T00:00:00	002220250117SO	12,420.00	Confirmed	2025-01-17 07:23
	003720250117INV	2024-08-15T00:00:00	005220250117SO	21,275.00	Confirmed	2025-01-17 07:23
	002920250117INV	2024-06-17T00:00:00	002420250117SO	7,429.00	Confirmed	2025-01-17 07:23
Customer: Stellar LLC - 1 item				<b>Total: 13,480.00</b>		
	002120250117INV	2024-05-29T00:00:00	000720250117SO	13,480.00	Draft	2025-01-17 07:23
Customer: Statewide LLC - 5 items				<b>Total: 51,205.00</b>		
	000720250117INV	2024-02-26T00:00:00	007320250117SO	14,630.00	Confirmed	2025-01-17 07:23
	001720250117INV	2024-04-07T00:00:00	006320250117SO	8,140.00	Draft	2025-01-17 07:23
	000402050117INV	2024-01-09T00:00:00	007520250117SO	8,600.00	Confirmed	2025-01-17 07:23
	001820250117INV	2024-04-27T00:00:00	007820250117SO	12,960.00	Cancelled	2025-01-17 07:23
	004120250117INV	2024-09-30T00:00:00	006720250117SO	7,475.00	Confirmed	2025-01-17 07:23

Items per page: 50 | Page: 1 of 1 pages (45 items)

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The Invoice Report is a key feature within the sales module, designed to present invoice data in a structured grid format. The report organizes information by **Invoice Number**, providing a clear and concise overview of billing activities. For each invoice, fields such as **Invoice Date**, **Sales Order**, **Total Amount**, and **Status** are displayed, ensuring comprehensive visibility into the invoicing process. This structured layout allows users to efficiently track and analyze invoices, simplifying the management of financial records and customer transactions.

Additionally, the report can be exported as an Excel file, offering flexibility for in-depth analysis or creating custom reports. This feature empowers businesses to evaluate billing trends, monitor outstanding payments, and ensure accuracy in financial reporting. By providing an intuitive and exportable report, the Invoice Report enhances decision-making, supports effective cash flow management, and contributes to overall financial efficiency.

### 3.4.12 Payment Receive Report

The screenshot displays the 'PaymentReceive Report List' page within a CRM application. The main content area is a grid showing payment records. The columns are: Number, Payment Date, Invoice, Payment Method, Amount, Status, and Created At UTC. The grid is organized by customer, with sections for 'Customer: Unity LLC - 1 item', 'Customer: Sunset LLC - 3 items', 'Customer: Statewide LLC - 3 items', 'Customer: Prosperity LLC - 2 items', and 'Customer: Oasis LLC - 4 items'. Each section contains one or more payment entries. For example, the 'Customer: Unity LLC' section has one entry: Number 001420250117PYRC, Payment Date 2024-04-23T00:00:00, Invoice 003920250117INV, Payment Method Credit Card, Amount 16,100.00, Status Confirmed, and Created At UTC 2025-01-17 07:23. The bottom of the grid shows pagination controls (1 of 1 pages / 28 items) and a note: '© 2025 Acme Corp. All Right Reserved.'

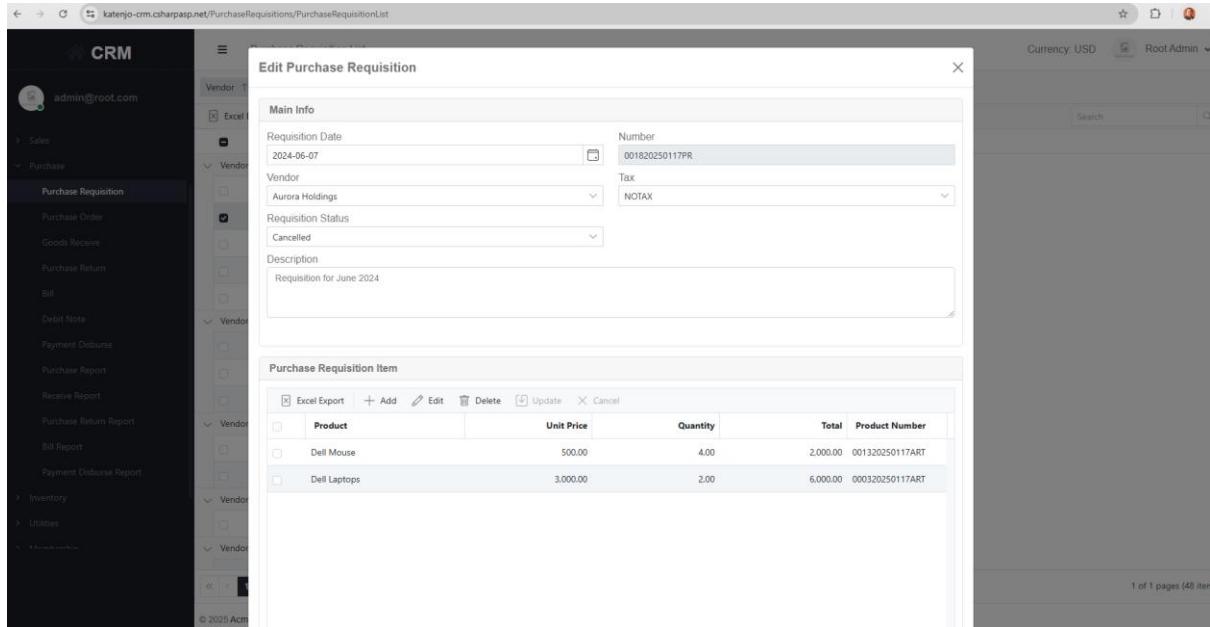
Customer	Number	Payment Date	Invoice	Payment Method	Amount	Status	Created At UTC
Customer: Unity LLC - 1 item	001420250117PYRC	2024-04-23T00:00:00	003920250117INV	Credit Card	16,100.00	Confirmed	2025-01-17 07:23
Customer: Sunset LLC - 3 items	000920250117PYRC	2024-03-17T00:00:00	002920250117INV	Bank Transfer	7,429.00	Confirmed	2025-01-17 07:23
	002520250117PYRC	2024-07-01T00:00:00	003720250117INV	Bank Transfer	21,275.00	Confirmed	2025-01-17 07:23
	003420250117PYRC	2024-06-19T00:00:00	002220250117INV	Cash	12,420.00	Confirmed	2025-01-17 07:23
Customer: Statewide LLC - 3 items	001920250117PYRC	2024-05-24T00:00:00	004120250117INV	Credit Card	7,475.00	Draft	2025-01-17 07:23
	002220250117PYRC	2024-06-14T00:00:00	000720250117INV	Cash	14,030.00	Confirmed	2025-01-17 07:23
	002720250117PYRC	2024-07-23T00:00:00	000420250117INV	Debit Card	8,600.00	Confirmed	2025-01-17 07:23
Customer: Prosperity LLC - 2 items	001820250117PYRC	2024-05-30T00:00:00	003620250117INV	Debit Card	13,000.00	Draft	2025-01-17 07:23
	000620250117PYRC	2024-02-05T00:00:00	003120250117INV	Cash	19,680.00	Draft	2025-01-17 07:23
Customer: Oasis LLC - 4 items	002020250117PYRC	2024-05-15T00:00:00	004320250117INV	PayPal	15,502.00	Archived	2025-01-17 07:23
	001620250117PYRC	2024-04-05T00:00:00	003420250117INV	Bank Transfer	10,902.00	Draft	2025-01-17 07:23

The Payment Receive Report is a vital feature within the sales module, designed to present payment data in a structured grid format. The report organizes information by **Payment Number**, providing a clear and concise view of all recorded customer payments. Key fields such as **Payment Date**, **Invoice**, **Payment Method**, **Amount**, and **Status** are displayed for each entry, ensuring a comprehensive overview of payment activities. This structured approach allows users to efficiently track payments, link them to their respective invoices, and monitor financial transactions with ease.

Additionally, the report can be exported as an Excel file, enabling businesses to perform deeper analyses or generate custom reports tailored to their needs. This capability allows companies to evaluate payment trends, ensure timely reconciliation of accounts, and maintain accurate financial records. By offering an intuitive and exportable report, the Payment Receive Report supports better cash flow management, enhances transparency in payment tracking, and strengthens overall financial operations.

## 3.5 Purchase Modules

### 3.5.1 Purchase Requisition



The Purchase Requisition feature within the Purchase module is designed to streamline the procurement process by allowing users to request goods or services from vendors. It includes key fields such as **Requisition Date**, which tracks the date the requisition was created, and **Vendor Lookup**, enabling users to select the appropriate vendor for each request. Additionally, the **Tax Lookup** field ensures that the correct tax rates are applied based on the selected vendor and item category. The **Requisition Status** field, which can be set to **Draft**, **Cancelled**, **Confirmed**, or **Ordered**, provides clarity on the current stage of the requisition, ensuring smooth progress through the procurement process.

This module helps businesses manage and control their purchasing activities by providing a structured and organized method for generating requisitions. The ability to track requisition statuses ensures that each request moves efficiently from initiation to finalization, reducing delays and errors. By streamlining the purchasing workflow, the Purchase Requisition feature enhances procurement visibility, improves supplier coordination, and helps maintain accurate records for budgeting and financial planning purposes.

### 3.5.2 Purchase Order

The screenshot shows a CRM application interface with a left sidebar and a main content area. The sidebar includes navigation links for Purchase Order, Goods Receive, Purchase Return, Bill, Debit Note, Payment Disburse, Purchase Report, Receive Report, Purchase Return Report, Bill Report, and Payment Disburse Report. The main content area is titled 'Purchase Order List' and displays a table of purchase orders. The table has columns for Number, PO Date, Status, Tax, Total Amount, and Created At UTC. The table is grouped by vendor, showing entries for Apex Ventures, Aurora Holdings, and Cascade Enterprises. Each group contains multiple purchase order records with their respective details. At the bottom of the table, there are pagination controls (page 1 of 2) and a note indicating 78 items.

Number	PO Date	Status	Tax	Total Amount	Created At UTC
006920250117PO	2024-12-17	Archived	T10	142,760.00	2025-01-17 07:21
006220250117PO	2024-11-26	Draft	T10	174,460.00	2025-01-17 07:21
005920250117PO	2024-10-10	Cancelled	T15	257,600.00	2025-01-17 07:21
003520250117PO	2024-06-25	Cancelled	T10	191,620.00	2025-01-17 07:21
001920250117PO	2024-04-24	Confirmed	NOTAX	135,000.00	2025-01-17 07:21
000620250117PO	2024-01-21	Confirmed	T10	180,180.00	2025-01-17 07:21
✓ Vendor: Apex Ventures - 6 items					
004830250117PO	2024-08-23	Cancelled	T10	229,790.00	2025-01-17 07:21
002220250117PO	2024-04-12	Cancelled	T15	38,214.50	2025-01-17 07:21
001220250117PO	2024-02-14	Archived	NOTAX	111,800.00	2025-01-17 07:21
000820250117PO	2024-02-11	Draft	NOTAX	76,800.00	2025-01-17 07:21
✓ Vendor: Aurora Holdings - 4 items					
005220250117PO	2024-09-15	Confirmed	T20	488,400.00	2025-01-17 07:21
004820250117PO	2024-08-01	Draft	T15	111,964.00	2025-01-17 07:21
004420250117PO	2024-08-26	Cancelled	NOTAX	134,560.00	2025-01-17 07:21
✓ Vendor: Cascade Enterprises - 7 items					
005220250117PO	2024-09-15	Confirmed	T20	488,400.00	2025-01-17 07:21
004820250117PO	2024-08-01	Draft	T15	111,964.00	2025-01-17 07:21
004420250117PO	2024-08-26	Cancelled	NOTAX	134,560.00	2025-01-17 07:21

Purchase Order is an essential component of the procurement module, designed to facilitate the creation of purchase requests from vendors. The primary function of this feature is to capture key information such as vendor details and order status. This ensures that all relevant order data is accurately recorded and easily accessible. Purchase orders can be efficiently created, with the ability to input a variety of items, including product descriptions, quantities, and prices, making the process streamlined and user-friendly for procurement teams.

Once the purchase order is completed, it can be generated into a PDF format, enabling businesses to create a hard copy for physical documentation or vendor distribution. This feature simplifies the procurement process by providing a reliable and consistent method for managing purchase orders, ensuring that both the procurement team and vendors have access to accurate and up-to-date order details. It also enhances operational efficiency by reducing the need for manual record-keeping and offering a standardized format for all purchase orders, helping to improve the overall purchasing workflow.

### 3.5.3 Goods Receive

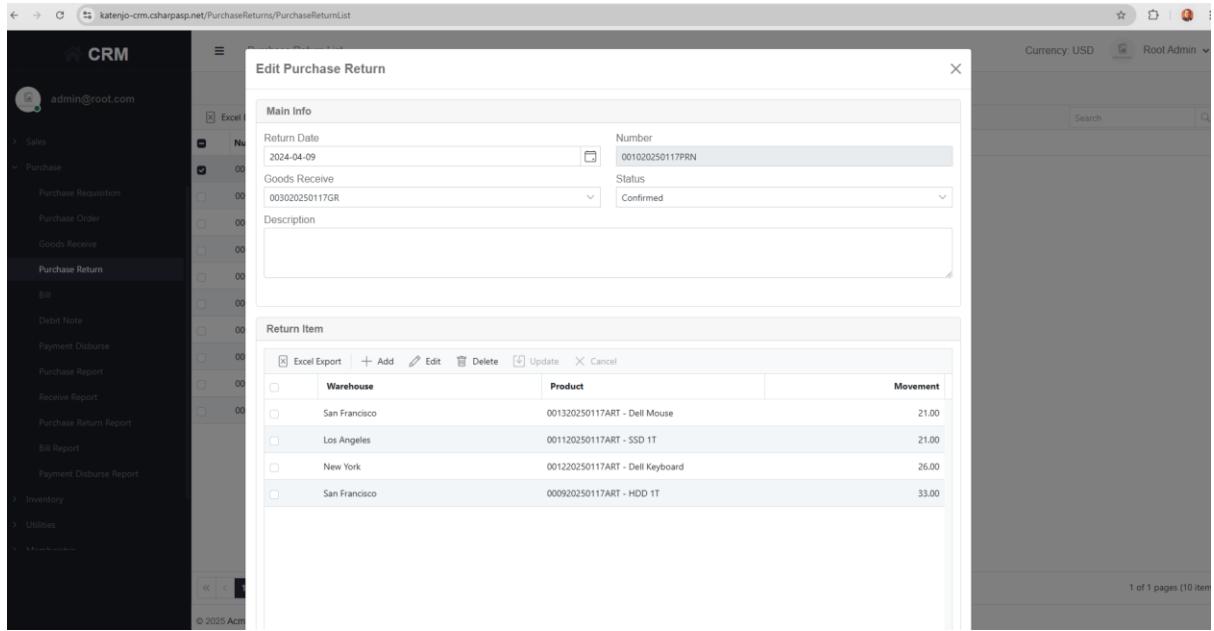
The screenshot shows the 'Edit Goods Receive' dialog box. In the 'Main Info' section, the 'Receive Date' is set to '2024-02-14', the 'Purchase Order' is '001020250117PO', and the 'Status' is 'Confirmed'. The 'Number' field contains '004220250117GR'. The 'Description' field is empty. Below this, the 'Receive Item' section displays a grid of received items. The grid has columns for 'Warehouse', 'Product', and 'Movement'. The data is as follows:

Warehouse	Product	Movement
San Francisco	000820250117ART - HDD 500	42.00
Los Angeles	000220250117ART - Dell Desktop Computers	23.00
Chicago	001320250117ART - Dell Mouse	37.00

The Goods Receive feature within the Purchase module is essential for tracking and recording the receipt of goods or services from suppliers. This feature includes fields such as **Receive Date**, which captures the date on which the goods or services are received, and a **Purchase Order Lookup** to link the received items to the corresponding purchase order. The **Status** field, which can be set to **Draft**, **Confirmed**, or **Cancelled**, helps manage the progress of the goods receipt, ensuring that each stage of the process is tracked accurately and efficiently.

By using this feature, businesses can ensure proper documentation of goods or services received, reducing errors and discrepancies between what was ordered and what was delivered. The ability to track the status of each goods receipt helps prevent delays and provides better control over inventory management. This streamlined process enhances overall operational efficiency, ensuring that the receiving process is aligned with purchase orders, and supports accurate financial reporting and inventory tracking.

### 3.5.4 Purchase Return



The Purchase Return feature within the Purchase module is crucial for managing the return of goods to vendors. It allows businesses to record returns of items that may have been damaged, incorrect, or no longer needed. Key fields such as **Return Date** capture when the items were returned, while the **Goods Receive Lookup** links the return to the specific goods received, ensuring the transaction is properly documented. The **Status** field, which can be set to **Draft**, **Confirmed**, or **Cancelled**, helps track the progress of the return, providing visibility into whether the return has been initiated, processed, or canceled.

This feature streamlines the return process by maintaining a clear connection between goods received and returned, reducing errors and improving transparency in procurement activities. The ability to manage and track returns within the system helps businesses maintain accurate inventory records, handle vendor relationships efficiently, and ensure proper adjustments to financial records. By using the Purchase Return feature, companies can better manage their purchasing activities, improve supplier coordination, and ensure compliance with return policies.

### 3.5.5 Bill

The screenshot shows the 'Edit Bill' dialog box within a CRM application. The 'Main Info' section includes fields for Bill Date (2024-05-11), Purchase Order (003820250117PO), Number (002420250117BIL), and Bill Status (Cancelled). The 'Items' section displays a table of purchased items with the following data:

Number	Name	Unit Price	Quantity	Total
001020250117ART	SSD 500	1,000.00	41.00	41,000.00
000920250117ART	HDD 1T	800.00	46.00	36,800.00
000320250117ART	Dell Laptops	3,000.00	48.00	144,000.00
000820250117ART	HDD 500	500.00	47.00	23,500.00

The 'Bill Summary' section shows Subtotal (245,300.00) and Tax (24,530.00). The sidebar on the left lists various modules: Sales, Purchase (Purchase Requisition, Purchase Order, Goods Receive, Purchase Return), and Bill (Debit Note, Payment Disburse, Purchase Report, Receive Report, Purchase Return Report, Bill Report, Payment Disburse Report). The bottom right corner indicates 1 of 1 pages (24 item).

The Bill feature in the Purchase module is designed to record invoices or bills from vendors related to purchase orders. It helps businesses track the financial aspect of their procurement process, ensuring that payments are accurately aligned with the goods or services received. The **Bill Date** field captures when the invoice is issued, and the **Purchase Order Lookup** links the bill to the corresponding purchase order, providing a clear connection between the order and the billed amount. The **Status** field, which can be set to **Draft**, **Confirmed**, or **Cancelled**, offers visibility into the current stage of the bill, making it easier to manage and control vendor invoices.

This feature ensures that businesses can efficiently manage the payment process by keeping track of vendor bills and preventing discrepancies. By associating the bill with the correct purchase order, companies can verify the accuracy of billed amounts, confirm receipt of goods or services, and ensure timely payments. The Bill feature enhances financial control, improves supplier relationships, and streamlines accounting processes, making it an essential tool for efficient procurement and cost management.

### 3.5.6 Debit Note

The screenshot shows the 'Edit Debit Note' dialog box within a CRM application. The 'Main Info' section includes fields for Debit Note Date (2024-01-15), Number (000120250117DN), Purchase Return (001020250117PRN), and Debit Note Status (Confirmed). The 'Items' section displays a table of returned items with their details and unit prices. The 'Debit Note Summary' section provides a breakdown of the total amount.

Number	Name	Unit Price	Quantity	Total
001320250117ART	Dell Mouse	500.00	21.00	10,500.00
001120250117ART	SSD 1T	1,500.00	21.00	31,500.00
001220250117ART	Dell Keyboard	700.00	26.00	18,200.00
000920250117ART	HDD 1T	800.00	33.00	26,400.00

	Subtotal	86,600.00
Tax	12,990.00	

The Debit Note feature in the Purchase module is designed to record the creation of debit notes for goods returned to vendors. When items are returned due to issues such as damage, incorrect shipments, or overstock, businesses can issue a debit note to formally adjust the amount owed to the vendor. The **Debit Note Date** field captures the date the debit note is issued, while the **Purchase Return Lookup** ensures that the debit note is linked to the corresponding return transaction. The **Status** field, which can be set to **Draft**, **Cancelled**, or **Confirmed**, helps track the progress of the debit note and ensures that it is properly processed.

This feature enhances the accuracy and efficiency of the return and adjustment process, providing businesses with a clear record of the transaction. By linking debit notes directly to the associated purchase return, the system ensures that financial records are consistent and up-to-date. Additionally, the ability to track the status of each debit note helps prevent errors and ensures that all returns are accounted for accurately. The Debit Note feature simplifies the reconciliation process with vendors, strengthens financial controls, and ensures proper adjustments are made to vendor balances.

### 3.5.7 Payment Disburse

The screenshot shows the 'Edit Payment Disburse' dialog box over a CRM interface. The dialog has two main sections: 'Main Info' and 'Items'.

**Main Info:**

- Payment Disburse Date: 2024-05-18
- Number: 001820250117PYDS
- Bill: 002020250117BIL
- Payment Method: Cash
- Amount Disbursed: 148800
- Description: Payment Disbursed on May 2024

**Items:**

Number	Name	Unit Price	Quantity	Total
001720250117ART	D365 License	800.00	23.000.00	33.600.00
001720250117ART	D365 License	800.00	21.000.00	43.000.00
001220250117ART	Dell Keyboard	700.00	1.000.00	3.200.00
001420250117ART	Dell Monitor 27inch	1.000.00	1.000.00	1.000.00
000420250117ART	Network Cables	100.00	1.000.00	1.000.00

**Bill Summary:**

Subtotal	124,000.00
----------	------------

1 of 1 pages (18 item)

The Payment Disburse feature in the Purchase module is essential for managing and recording payments made to vendors. It enables businesses to document the disbursement of funds for bills, ensuring proper tracking and reconciliation of financial transactions. Key fields include **Payment Disburse Date**, which records the date the payment was issued, and a **Bill Lookup**, linking the disbursement to the relevant vendor invoice. Additionally, the **Payment Method Lookup** allows users to specify the mode of payment, such as cash, debit card, credit card, bank transfer, or PayPal. The **Payment Disburse Status**, which can be set to **Draft**, **Cancelled**, or **Confirmed**, provides visibility into the payment's progress, while the **Amount Disbursed** field ensures accurate documentation of the payment amount.

This feature streamlines the payment process by offering a centralized and structured way to manage vendor transactions. By linking payments directly to bills, businesses can prevent discrepancies, ensure timely disbursements, and maintain accurate financial records. The flexibility to specify different payment methods also allows organizations to adapt to various payment scenarios and vendor preferences. Overall, the Payment Disburse feature enhances financial control, improves vendor relationships, and simplifies the accounting process by ensuring all outgoing payments are properly documented and managed.

### 3.5.8 Purchase Report

PurchaseOrder	Vendor	Product Number	Product Name	Unit Price	Quantity	Total	Created At UTC	
<b>Total: 182,000.00</b>								
PurchaseOrder: 007820250117PO - 3 items	Zenith Corporation	000620250117ART	Antennas and Signal Boosters	2,000.00	37	74,000.00	2025-01-17 07:21	
	Zenith Corporation	000220250117ART	Dell Desktop Computers	2,000.00	32	64,000.00	2025-01-17 07:21	
	Zenith Corporation	000720250117ART	Wifi	1,000.00	44	44,000.00	2025-01-17 07:21	
<b>Total: 230,200.00</b>								
PurchaseOrder: 007720250117PO - 5 items	Equinox Enterprises	000320250117ART	Dell Laptops	3,000.00	24	72,000.00	2025-01-17 07:21	
	Equinox Enterprises	000920250117ART	HDD 1T	800.00	35	28,000.00	2025-01-17 07:21	
	Equinox Enterprises	001520250117ART	Dell Monitor 32inch	1,500.00	38	57,000.00	2025-01-17 07:21	
	Equinox Enterprises	000420250117ART	Network Cables	100.00	27	2,700.00	2025-01-17 07:21	
PurchaseOrder: 007620250117PO - 4 items	Equinox Enterprises	001520250117ART	Dell Monitor 32inch	1,500.00	47	70,500.00	2025-01-17 07:21	
	<b>Total: 178,620.00</b>							
	Momentum Ventures	000820250117ART	HDD 500	500.00	45	22,500.00	2025-01-17 07:21	
	Momentum Ventures	001620250117ART	Dell Webcams	500.00	25	12,500.00	2025-01-17 07:21	
PurchaseOrder: 007520250117PO - 3 items	Momentum Ventures	000320250117ART	Dell Laptops	3,000.00	48	144,000.00	2025-01-17 07:21	
	Momentum Ventures	001920250117ART	Discount	-10.00	38	-380.00	2025-01-17 07:21	
	<b>Total: 171,630.00</b>							

Items per page: 50 | Page: 1 of 7 pages (306 items)

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Purchase Report is a key feature within the procurement module, designed to display purchase data in a grid format. The report groups the information by purchase order number, making it easy to track and analyze multiple purchase orders at once. Below each group, the order details are displayed, providing a clear and concise view of the procurement activities. This structure allows users to quickly identify relevant information without navigating through complex data, improving efficiency and accuracy.

Additionally, the grid format can be downloaded as an Excel file, enabling users to perform deeper analysis or generate custom reports. This feature allows businesses to easily export purchase data for further examination, offering flexibility for reporting and decision-making. By providing the ability to download and manipulate the data, the purchase report feature supports better insights into procurement performance, vendor relationships, and purchasing trends, ultimately helping businesses improve their purchasing strategies and operational efficiency.

### 3.5.9 Receive Report

Purchase Order	Vendor	Warehouse	Product Number	Product Name	Quantity	Created At UTC
003620250117PO	Spectrum Corporation	Los Angeles	001420250117ART	Dell Monitor 27inch	28	2025-01-17 07:21
003620250117PO	Spectrum Corporation	San Francisco	001420250117ART	Dell Monitor 27inch	33	2025-01-17 07:21
003620250117PO	Spectrum Corporation	Los Angeles	000120250117ART	Dell Servers	38	2025-01-17 07:21
<b>Total: 99.00</b>						
001020250117PO	Cascade Enterprises	San Francisco	000620250117ART	HDD 500	42	2025-01-17 07:21
001020250117PO	Cascade Enterprises	Los Angeles	000220250117ART	Dell Desktop Computers	23	2025-01-17 07:21
001020250117PO	Cascade Enterprises	Chicago	001320250117ART	Dell Mouse	37	2025-01-17 07:21
<b>Total: 102.00</b>						
007420250117PO	Sovereign Solutions	Los Angeles	000220250117ART	Dell Desktop Computers	35	2025-01-17 07:21
007420250117PO	Sovereign Solutions	Chicago	000320250117ART	Dell Laptops	29	2025-01-17 07:21
007420250117PO	Sovereign Solutions	New York	000220250117ART	Dell Desktop Computers	29	2025-01-17 07:21
007420250117PO	Sovereign Solutions	New York	000420250117ART	Network Cables	23	2025-01-17 07:21
007420250117PO	Sovereign Solutions	San Francisco	000720250117ART	Wifii	41	2025-01-17 07:21
<b>Total: 157.00</b>						
005320250117PO	Phoenix Holdings	Chicago	000620250117ART	Antennas and Signal Boosters	38	2025-01-17 07:21
<b>Total: 110.00</b>						
Items per page: 50   < << 1 2 3 4 >> >>>						

1 of 4 pages (154 items)

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The Goods Receive Report is a key feature within the procurement module, designed to present goods receipt data in a structured grid format. The report organizes information by **Purchase Order**, allowing users to easily track and analyze goods received for specific orders. For each purchase order, additional details such as **Vendor**, **Warehouse**, **Product**, and **Quantity** are displayed, providing a comprehensive overview of received goods. This structured layout helps users quickly locate relevant information, reducing the time and effort required to navigate extensive data, thereby improving operational efficiency and accuracy.

Additionally, the report can be exported as an Excel file, offering flexibility for more in-depth analysis or the creation of custom reports. Businesses can use this feature to monitor goods receipt trends, evaluate vendor performance, and ensure accuracy in inventory management. By providing an intuitive and exportable report, the Goods Receive Report enhances visibility into procurement activities, supports informed decision-making, and contributes to better coordination between procurement and warehouse operations.

### 3.5.10 Purchase Return Report

The screenshot shows a CRM application interface for managing purchase returns. The left sidebar has a navigation menu with categories like Sales, Purchase, Purchase Requisition, Purchase Order, Goods Receive, Purchase Return, Bill, Debit Note, Payment Disburse, Purchase Report, Receive Report, Purchase Return Report (which is selected), Bill Report, and Payment Disburse Report. The main content area is titled "PurchaseReturn Report List" and displays a table of returned items. The table has columns: GoodsReceive, Vendor, Warehouse, Product Number, Product Name, Quantity, and Created At UTC. There are several groups in the table, each representing a different purchase return. Each group has a total quantity listed at the bottom. An "Excel Export" button is located at the top right of the table area.

GoodsReceive	Vendor	Warehouse	Product Number	Product Name	Quantity	Created At UTC
PurchaseReturn: 001020250117PRN - 4 items						
003020250117GR	Elysium Enterprises	San Francisco	001320250117ART	Dell Mouse	21	2025-01-17 07:21
003020250117GR	Elysium Enterprises	Los Angeles	001120250117ART	SSD 1T	21	2025-01-17 07:21
003020250117GR	Elysium Enterprises	New York	001220250117ART	Dell Keyboard	26	2025-01-17 07:21
003020250117GR	Elysium Enterprises	San Francisco	000920250117ART	HDD 1T	33	2025-01-17 07:21
PurchaseReturn: 000920250117PRN - 1 item						
001520250117GR	Sovereign Solutions	San Francisco	000520250117ART	Routers and Switches	42	2025-01-17 07:21
PurchaseReturn: 000820250117PRN - 4 items						
002220250117GR	Apex Ventures	Los Angeles	000420250117ART	Network Cables	48	2025-01-17 07:21
002220250117GR	Apex Ventures	New York	000620250117ART	Antennas and Signal Boosters	44	2025-01-17 07:21
002220250117GR	Apex Ventures	New York	000820250117ART	HDD 500	38	2025-01-17 07:21
002220250117GR	Apex Ventures	Chicago	000220250117ART	Dell Desktop Computers	26	2025-01-17 07:21
PurchaseReturn: 000720250117PRN - 2 items						
002720250117GR	Elysium Enterprises	New York	001020250117ART	SSD 500	34	2025-01-17 07:21
002720250117GR	Elysium Enterprises	Chicago	001520250117ART	Dell Monitor 32inch	35	2025-01-17 07:21
PurchaseReturn: 000620250117PRN - 3 items						
						Total: 113.00

Items per page: 50 | 1 of 1 pages (38 items)

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The Purchase Return Report is a key feature within the procurement module, designed to present purchase return data in a structured grid format. The report organizes information by **Goods Receive**, enabling users to easily track and analyze returns associated with specific goods received. For each goods receipt, additional details such as **Vendor**, **Warehouse**, **Product**, and **Quantity** are displayed, offering a comprehensive view of returned items. This organized structure allows users to quickly locate relevant return information, streamlining the management of purchase returns and improving accuracy in record-keeping.

Moreover, the report can be exported as an Excel file, providing flexibility for deeper analysis or the creation of customized reports. This feature empowers businesses to monitor return trends, assess vendor performance, and evaluate the impact of returns on inventory and procurement strategies. By offering an intuitive and exportable report, the Purchase Return Report supports better decision-making, enhances visibility into return activities, and ensures more efficient handling of returned goods in collaboration with vendors and warehouses.

### 3.5.11 Bill Report

Vendor	Number	Bill Date	Purchase Order	Total Amount	Status	Created At UTC
Zenith Corporation - 2 items				<b>Total: 456,250.00</b>		
	001820250117BIL	2024-04-09T00:00:00	006720250117PO	185,100.00	Confirmed	2025-01-17 07:23
	002120250117BIL	2024-05-05T00:00:00	001320250117PO	271,150.00	Confirmed	2025-01-17 07:23
Vanguard Industries - 2 items				<b>Total: 165,814.00</b>		
	0013320250117BIL	2024-03-16T00:00:00	006120250117PO	132,250.00	Confirmed	2025-01-17 07:23
	001920250117BIL	2024-04-16T00:00:00	007220250117PO	33,564.00	Confirmed	2025-01-17 07:23
Summit Holdings - 1 item				<b>Total: 329,760.00</b>		
	000920250117BIL	2024-02-13T00:00:00	001420250117PO	329,760.00	Confirmed	2025-01-17 07:23
Spectrum Corporation - 1 item				<b>Total: 251,000.00</b>		
	000720250117BIL	2024-02-17T00:00:00	003620250117PO	251,000.00	Confirmed	2025-01-17 07:23
Sovereign Solutions - 3 items				<b>Total: 633,610.00</b>		
	001120250117BIL	2024-03-14T00:00:00	001620250117PO	105,480.00	Confirmed	2025-01-17 07:23
	002220250117BIL	2024-05-07T00:00:00	007420250117PO	258,300.00	Confirmed	2025-01-17 07:23
	002420250117BIL	2024-05-11T00:00:00	003820250117PO	269,830.00	Cancelled	2025-01-17 07:23
Infinity Holdings - 3 items				<b>Total: 906,160.00</b>		
	001520250117BIL	2024-03-19T00:00:00	006620250117PO	357,600.00	Cancelled	2025-01-17 07:23

Items per page: 50 | Page: 1 of 1 pages (24 items)

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The Bill Report is a key feature within the procurement module, designed to present billing data in a structured grid format. The report organizes information by **Bill Date**, making it simple for users to track and analyze bills associated with specific purchase orders. For each bill, key details such as **Purchase Order**, **Total Amount**, and **Status** are displayed, providing a clear and concise overview of vendor billing activities. This structured layout enables users to efficiently locate and review relevant billing information, reducing time spent navigating extensive financial records and improving accuracy in financial management.

Additionally, the report can be exported as an Excel file, offering flexibility for more in-depth analysis or the creation of tailored reports. This feature helps businesses monitor billing trends, assess vendor payment patterns, and ensure alignment with procurement and payment processes. By providing an intuitive and exportable report, the Bill Report supports better financial decision-making, enhances transparency in vendor transactions, and contributes to improved cash flow and expense tracking within the organization.

### 3.5.12 Payment Disburse Report

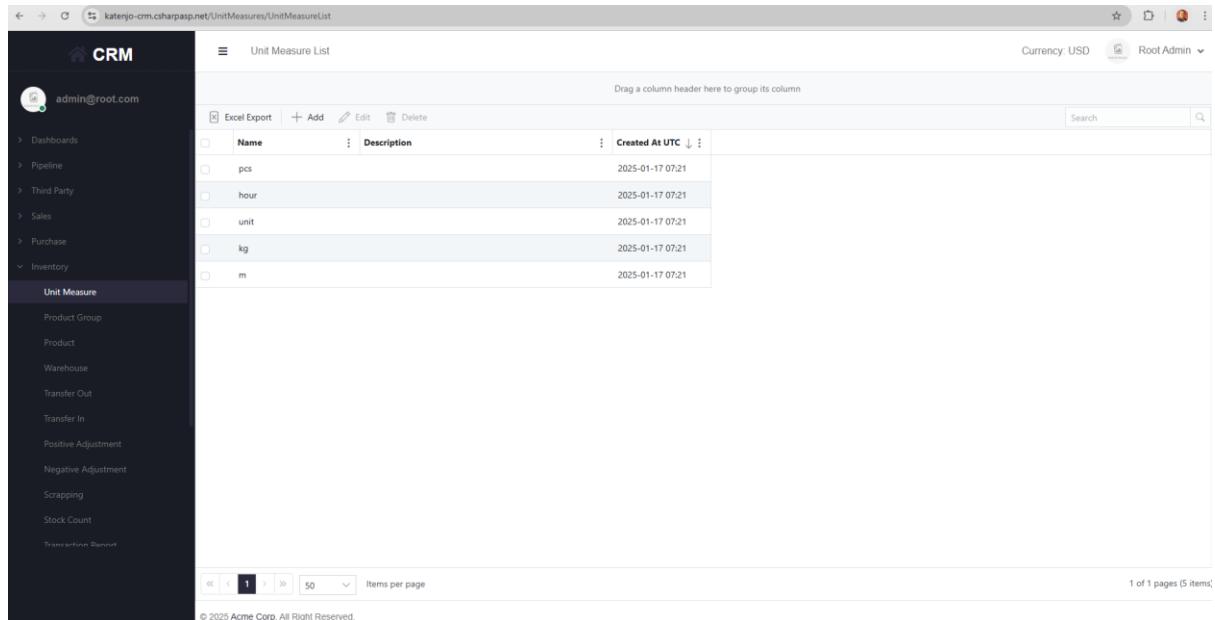
Number	Payment Date	Bill	Payment Method	Amount	Status	Created At UTC
001520250117PYDS	2024-04-17T00:00:00	002120250117BIL	Cash	271,150.00	Archived	2025-01-17 07:23
0004020250117PYDS	2024-01-22T00:00:00	001820250117BIL	Cash	185,100.00	Cancelled	2025-01-17 07:23
000520250117PYDS	2024-02-16T00:00:00	001320250117BIL	Credit Card	132,250.00	Confirmed	2025-01-17 07:23
000320250117PYDS	2024-01-18T00:00:00	001920250117BIL	Cash	33,564.00	Draft	2025-01-17 07:23
001620250117PYDS	2024-04-01T00:00:00	000920250117BIL	Bank Transfer	329,760.00	Confirmed	2025-01-17 07:23
000720250117PYDS	2024-02-15T00:00:00	000720250117BIL	PayPal	251,000.00	Archived	2025-01-17 07:23
000820250117PYDS	2024-02-04T00:00:00	002220250117BIL	PayPal	258,300.00	Confirmed	2025-01-17 07:23
000920250117PYDS	2024-03-16T00:00:00	001120250117BIL	Bank Transfer	105,480.00	Draft	2025-01-17 07:23
001720250117PYDS	2024-05-07T00:00:00	000820250117BIL	Debit Card	196,560.00	Confirmed	2025-01-17 07:23
000120250117PYDS	2024-01-28T00:00:00	000420250117BIL	PayPal	352,000.00	Archived	2025-01-17 07:23

The Payment Disburse Report is a key feature within the procurement module, designed to present payment disbursement data in a structured grid format. The report organizes information by **Date**, enabling users to easily track and analyze payments made against specific bills. For each payment disbursement, details such as **Bill**, **Payment Method**, **Amount**, and **Status** are displayed, offering a clear and comprehensive view of financial transactions with vendors. This organized structure allows users to quickly locate and review payment records, streamlining financial reconciliation and ensuring greater accuracy in managing vendor payments.

Additionally, the report can be exported as an Excel file, providing flexibility for in-depth financial analysis or the creation of customized reports. This feature empowers businesses to monitor payment trends, evaluate the effectiveness of payment methods, and ensure alignment with cash flow management strategies. By offering an intuitive and exportable report, the Payment Disburse Report supports better financial oversight, enhances transparency in vendor payments, and contributes to improved efficiency in procurement and financial operations.

## 3.6 Inventory Modules

### 3.6.1 Unit Measure



The screenshot shows a web-based CRM application interface. On the left, there is a dark sidebar menu with the title 'CRM' at the top. Below it, under 'Inventory', the 'Unit Measure' option is selected. The main content area is titled 'Unit Measure List'. At the top of this list, there are buttons for 'Excel Export', 'Add', 'Edit', and 'Delete'. A search bar is located at the top right. The main table displays six rows of data:

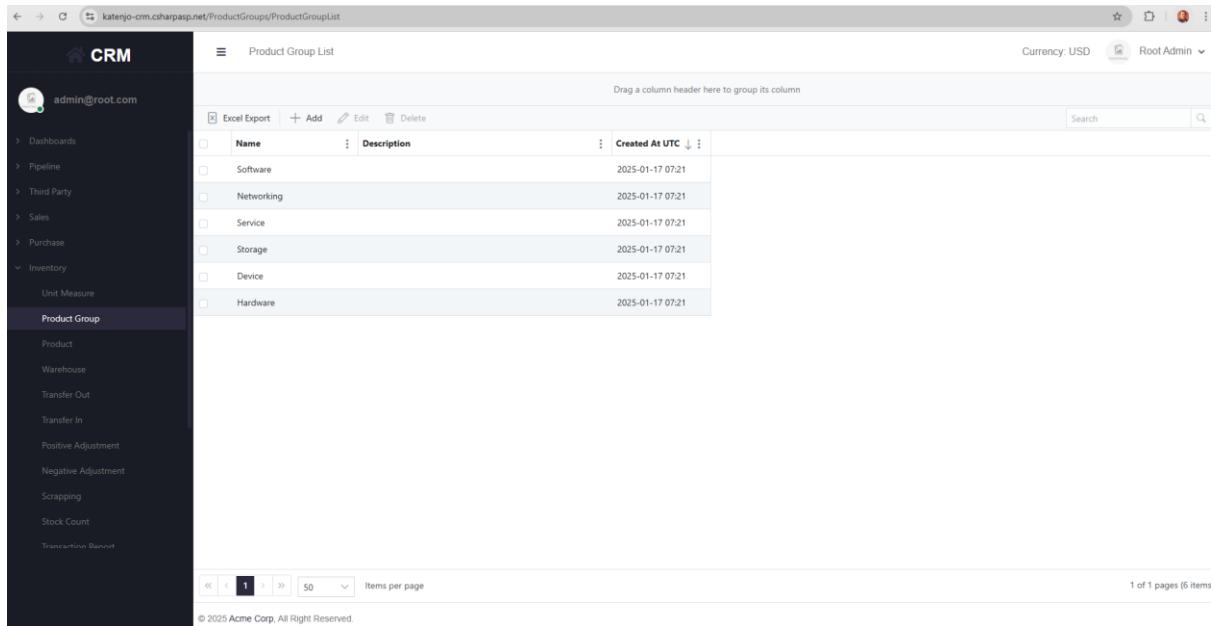
Name	Description	Created At UTC
pcs		2025-01-17 07:21
hour		2025-01-17 07:21
unit		2025-01-17 07:21
kg		2025-01-17 07:21
m		2025-01-17 07:21

At the bottom of the table, there are navigation buttons for 'Items per page' (set to 50) and a page number indicator '1 of 1 pages (5 items)'. The footer of the page includes the copyright notice '© 2025 Acme Corp. All Right Reserved.'

The Unit of Measure (UOM) feature within the inventory module is essential for defining how product quantities are measured and tracked. It serves as a standardized method to quantify both physical products and service products, ensuring consistency in inventory management and reporting. Units of Measure can be used to register the measurement metrics that will be applied to products, allowing businesses to track items in the most appropriate and efficient way. This helps streamline inventory processes by providing a clear understanding of how products are counted or quantified, whether by quantity, weight, length, or time.

The Unit of Measure consists of two key columns: Name and Description. The "Name" represents the unit itself, such as "unit," "pcs," "meter," or "hour" for service products. The "Description" provides additional context or details about how that unit is applied. For example, "pcs" could be used for products sold individually, while "meter" might be used for items measured by length, and "hour" could apply to service products where time is the key metric. This structure ensures that businesses can accurately register and manage their inventory, providing better control over stock levels, service deliveries, and overall operational efficiency.

### 3.6.2 Product Group

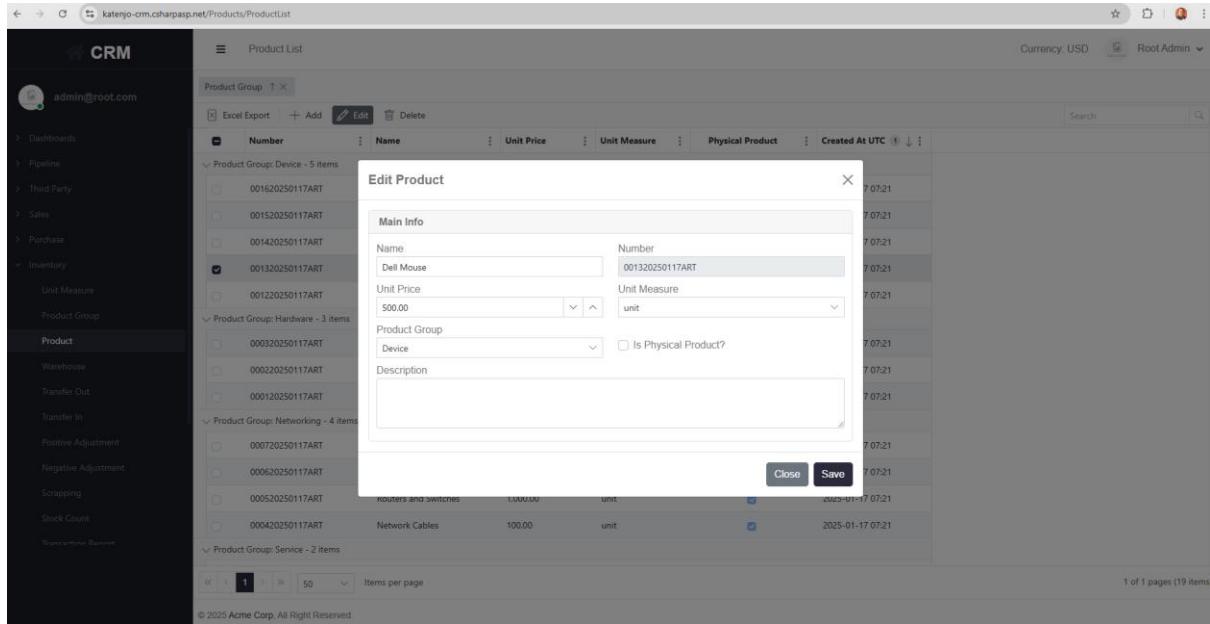


Name	Description	Created At UTC
Software		2025-01-17 07:21
Networking		2025-01-17 07:21
Service		2025-01-17 07:21
Storage		2025-01-17 07:21
Device		2025-01-17 07:21
Hardware		2025-01-17 07:21

The Product Group feature within the inventory module allows businesses to categorize products based on their specific needs, helping to streamline product management and inventory tracking. By grouping products into relevant categories such as Device, Storage, Hardware, Software, Service, and more, businesses can maintain better organization and control over their product offerings. This classification makes it easier to manage inventory levels, track sales, and optimize procurement strategies based on different product categories, ensuring more efficient business operations.

The master data for product groups is recorded using two key columns: Name and Description. The "Name" refers to the specific group, such as "Device" or "Storage," while the "Description" provides additional context or details about what types of products belong in each group. This structure allows businesses to clearly define and manage their product groups, ensuring that each product is properly categorized for easy access and analysis. By using Product Groups, companies can improve inventory visibility, enhance reporting capabilities, and make more informed decisions regarding stock management and sales strategies.

### 3.6.3 Product

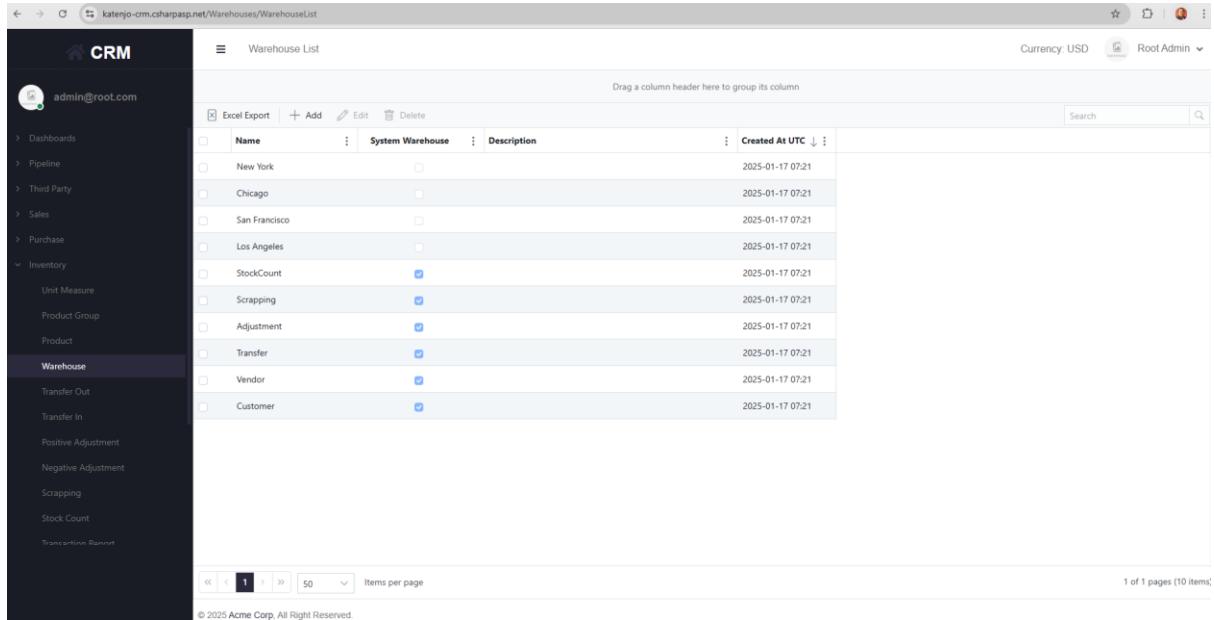


The screenshot shows the Katenjo CRM interface with the 'Product' module selected. A modal window titled 'Edit Product' is open, displaying the details for a product named 'Dell Mouse'. The modal includes fields for Name (Dell Mouse), Number (001320250117ART), Unit Price (500.00), Unit Measure (unit), and a dropdown for Product Group (Device). The 'Is Physical Product?' checkbox is checked. Below the main info, there is a description field and a table showing associations with other products across different groups like Networking and Service.

The Product feature within the inventory module is designed to capture master product data, serving as a central record for all items managed within the inventory system. When registering a product, key information such as unit measure, product unit, product group, and product type (whether physical or non-physical) can be entered. This comprehensive approach ensures that businesses can accurately track and manage their inventory across different product categories, whether they involve physical items or services.

By allowing businesses to specify whether a product is physical or non-physical, the system offers flexibility in managing a wide range of products, including tangible goods like electronics or furniture, as well as intangible services. This distinction is especially valuable when handling service products, as it helps separate inventory management for physical stock from service-based offerings, improving overall inventory accuracy and operational efficiency. The ability to associate products with specific unit measures and groups further enhances product categorization, making it easier to manage, report, and analyze inventory in a more organized and streamlined manner.

### 3.6.4 Warehouse



Name	System Warehouse	Description	Created At UTC
New York			2025-01-17 07:21
Chicago			2025-01-17 07:21
San Francisco			2025-01-17 07:21
Los Angeles			2025-01-17 07:21
StockCount	✓		2025-01-17 07:21
Scrapping	✓		2025-01-17 07:21
Adjustment	✓		2025-01-17 07:21
Transfer	✓		2025-01-17 07:21
Vendor	✓		2025-01-17 07:21
Customer	✓		2025-01-17 07:21

The Warehouse feature within the inventory module is designed to help businesses manage multiple warehouse locations by capturing master data for each warehouse. This is particularly useful for businesses that operate with several warehouse facilities and need a structured approach to manage inventory across various sites. Warehouse data is recorded using two key columns: Name and Description. The "Name" refers to the specific warehouse location, while the "Description" provides additional details about the warehouse, such as its function or capacity. This allows businesses to have a clear overview of their warehouse network, making it easier to track inventory and streamline logistics.

In addition to non-system warehouses that businesses create, such as their own storage facilities, the system also includes predefined system warehouses for internal use, such as vendor, customer, adjustment, scrapping, and stock count warehouses. These system warehouses are important for performing stock calculations and managing inventory adjustments, ensuring accurate tracking and reporting of stock movements. By using both non-system and system warehouses, businesses can have a comprehensive view of their inventory, enabling more effective management, better forecasting, and improved decision-making regarding stock levels and distribution.

### 3.6.5 Transfer Out

The screenshot shows the 'Transfer Out List' page within a CRM application. The left sidebar contains a navigation menu with items like Dashboards, Pipeline, Third Party, Sales, Purchase, Inventory (Unit Measure, Product Group, Product, Warehouse), Transfer Out (selected), Transfer In, Positive Adjustment, Negative Adjustment, Scrapping, Stock Count, and Quarantine Report. The main content area has a header 'Transfer Out List' and a sub-header 'Drag a column header here to group its column'. It includes a toolbar with Excel Export, Add, Edit, Delete, and Print PDF buttons. A search bar is at the top right. Below is a table with columns: Number, Release Date, Warehouse From, Warehouse To, Status, and Created At UTC (sorted by descending UTC). The table lists 15 transfer records. At the bottom are pagination controls (page 1 of 2), a dropdown for items per page (set to 50), and a footer note: '© 2025 Acme Corp. All Right Reserved.'

Number	Release Date	Warehouse From	Warehouse To	Status	Created At UTC
007820250117OUT	2025-01-03	New York	Los Angeles	Cancelled	2025-01-17 07:21
007720250117OUT	2025-01-21	Los Angeles	Chicago	Confirmed	2025-01-17 07:21
007620250117OUT	2025-01-13	Los Angeles	San Francisco	Archived	2025-01-17 07:21
007520250117OUT	2025-01-29	San Francisco	Los Angeles	Draft	2025-01-17 07:21
007420250117OUT	2025-01-06	Chicago	San Francisco	Draft	2025-01-17 07:21
007320250117OUT	2025-01-16	San Francisco	Chicago	Archived	2025-01-17 07:21
007220250117OUT	2024-12-02	Los Angeles	New York	Draft	2025-01-17 07:21
007120250117OUT	2024-12-15	San Francisco	New York	Confirmed	2025-01-17 07:21
007020250117OUT	2024-12-23	New York	Los Angeles	Cancelled	2025-01-17 07:21
006920250117OUT	2024-12-20	New York	Chicago	Draft	2025-01-17 07:21
006820250117OUT	2024-12-28	San Francisco	Chicago	Cancelled	2025-01-17 07:21
006720250117OUT	2024-12-06	Los Angeles	New York	Archived	2025-01-17 07:21
006620250117OUT	2024-11-23	Chicago	San Francisco	Confirmed	2025-01-17 07:21
006520250117OUT	2024-11-10	New York	Los Angeles	Confirmed	2025-01-17 07:21
006420250117OUT	2024-11-22	San Francisco	Chicago	Draft	2025-01-17 07:21

The Transfer Out feature in the inventory module, also known as warehouse-to-warehouse transfer, is a process that facilitates the movement of goods between two internal warehouses. This is a common procedure in businesses that have multiple warehouses, such as transferring items from a production warehouse to a distribution warehouse, or from a quarantine warehouse to the main warehouse. The Transfer Out process ensures that inventory levels are updated accurately across different locations and that goods are transferred seamlessly to where they are needed.

During a warehouse-to-warehouse transfer, key information is recorded, including the source warehouse and the destination warehouse. Additionally, the items being transferred, along with their quantities, are also tracked to ensure the correct products are moved between locations. This functionality plays a vital role in maintaining inventory accuracy across various warehouses, supporting efficient internal logistics, and enabling businesses to manage their stock levels effectively across different sites.

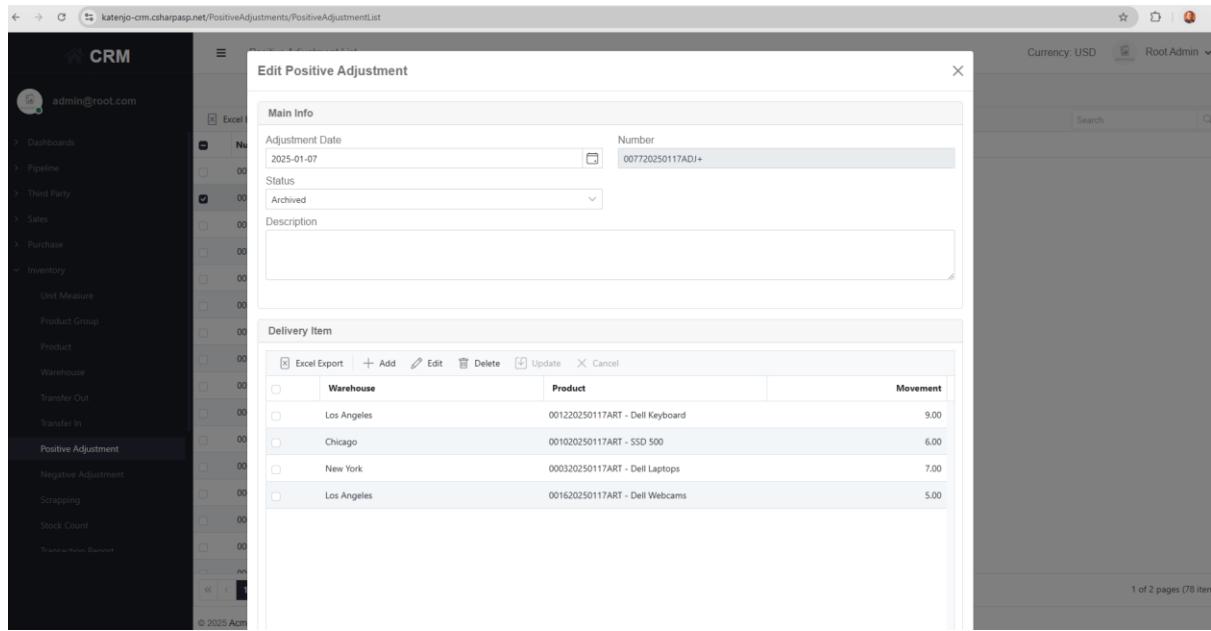
### 3.6.6 Transfer In

Product	Movement
000820250117ART - HDD 500	8.00
001420250117ART - Dell Monitor 27inch	5.00
001220250117ART - Dell Keyboard	6.00

The Transfer In feature in the inventory module is used by the operations warehouse team to record the receipt of goods that have been transferred from one internal warehouse to another, as part of the warehouse-to-warehouse transfer process. Once the goods arrive at the destination warehouse, the team creates a Transfer In document to officially acknowledge and record the receipt of the items. The Transfer In document references the corresponding Transfer Out document, ensuring that the transfer process is properly tracked from start to finish.

Key information in the Transfer In process includes the reference to the original Transfer Out document, which serves as the primary point of reference for the incoming goods. Additionally, the receiving warehouse is automatically populated with the information from the destination warehouse noted in the Transfer Out document. This feature streamlines inventory tracking and ensures that the destination warehouse's stock is updated accurately, completing the warehouse-to-warehouse transfer cycle and maintaining proper inventory control across multiple locations.

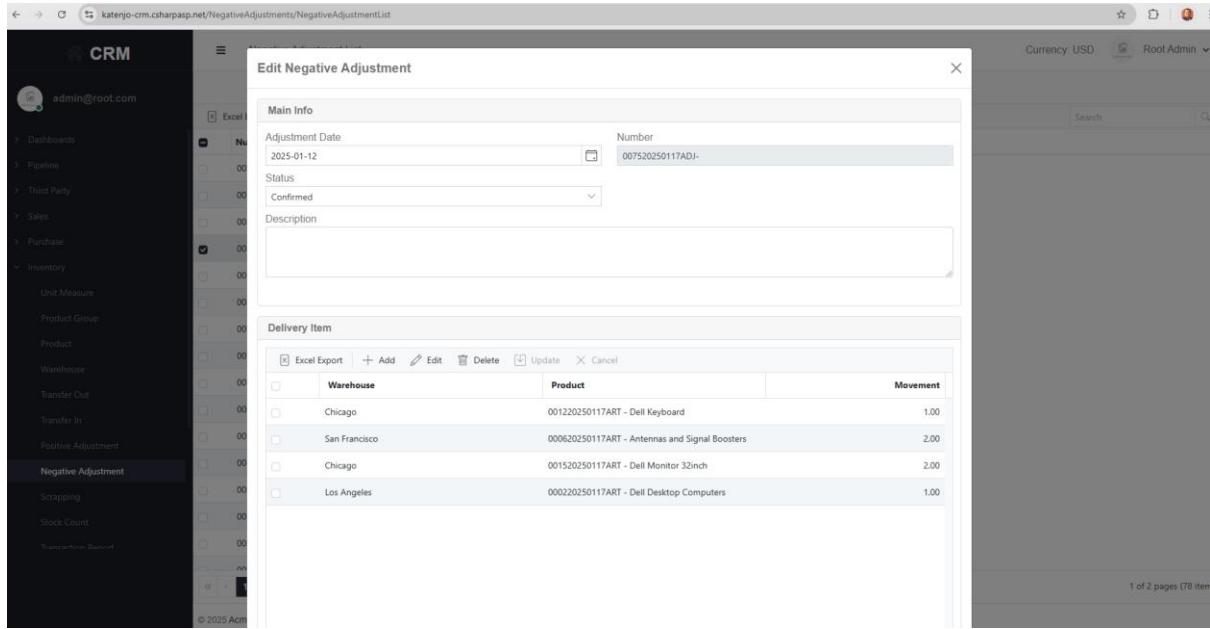
### 3.6.7 Positive Adjustment



Positive Adjustment is a feature in the inventory module that allows businesses to increase the quantity of a specific product in the stock, effectively adding more units to the existing inventory. This process is typically used when there is a need to correct stock discrepancies or when additional items are received but not initially recorded. The primary information captured in a positive adjustment includes the warehouse, the product being adjusted, and the quantity to be added.

Once the positive adjustment is recorded, the specified quantity is added to the existing stock level of the product in the designated warehouse. This ensures that the inventory records accurately reflect the updated stock levels, helping businesses maintain better control and tracking of their product quantities. Positive adjustments play a vital role in inventory management by ensuring that stock counts remain accurate and that inventory levels are properly adjusted to reflect actual availability.

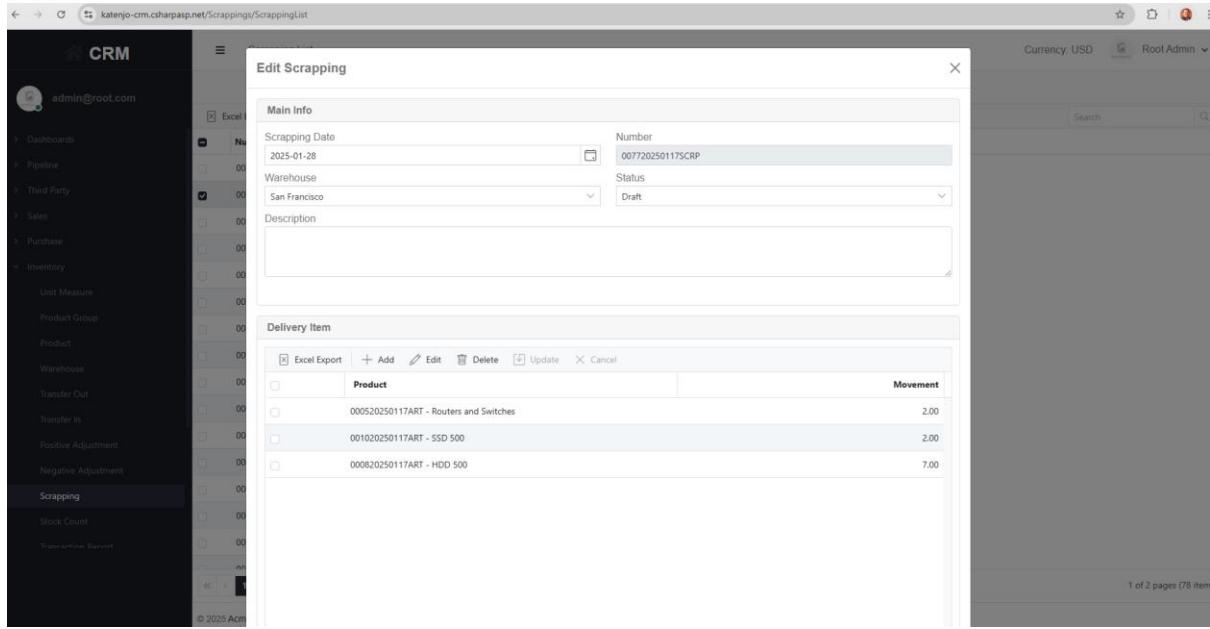
### 3.6.8 Negative Adjustment



Negative Adjustment is a feature in the inventory module that allows businesses to decrease the quantity of a specific product in stock, effectively reducing the inventory count. This process is typically used when there is a need to correct stock discrepancies, when products are lost, damaged, or returned, or when items are mistakenly overcounted. The primary information captured in a negative adjustment includes the warehouse, the product being adjusted, and the quantity to be subtracted.

Once the negative adjustment is recorded, the specified quantity is subtracted from the existing stock level of the product in the designated warehouse. This ensures that the inventory records are updated to reflect the accurate stock levels, preventing overstocking and maintaining inventory control. Negative adjustments are critical for inventory management by ensuring that stock counts are accurate and that any discrepancies are corrected, helping businesses maintain proper tracking of product quantities.

### 3.6.9 Scrapping



Scrapping is a feature in the inventory module used to manage the disposal or destruction of damaged goods. When products are deemed unsellable or no longer usable due to damage, expiration, or other factors, scrapping allows businesses to remove them from the inventory. This process ensures that these items are properly accounted for and that stock levels reflect the actual usable inventory. A dedicated system warehouse is created for scrapping to track the movement of goods being discarded, ensuring that the reduction in stock is properly recorded.

The key information captured during scrapping includes the warehouse from which the goods are being removed, the specific product being scrapped, and the quantity of the damaged goods. This process helps monitor the amount of stock being scrapped and enables businesses to analyze trends, such as why certain products are consistently being discarded. By tracking scrapping activities, businesses can identify areas for improvement, whether in product quality, handling processes, or inventory control, and take corrective actions to minimize losses.

### 3.6.10 Stock Count

Main Info

Count Date	2025-01-16	Number	0078202501175C
Warehouse	Los Angeles	Status	Cancelled
Description			

Delivery Item

Product	System Stock	Counted	Adjustment
000420250117ART - Network Cables	17.00	7.00	+10.00
000820250117ART - HDD 500	15.00	8.00	+7.00
001320250117ART - Dell Mouse	23.00	15.00	+8.00
001320250117ART - Dell Mouse	23.00	23.00	0.00
000620250117ART - Antennas and Signal Boosters	-17.00	44.00	-61.00

Stock count is a process in the inventory module that involves physically counting the existing stock in the warehouse. This physical count is then recorded in the system to ensure that the inventory records are accurate. The stock count helps businesses verify the actual quantities of products available in the warehouse and ensures that the system's stock levels match the physical stock. Any discrepancies between the system's recorded stock and the physical count are identified during this process.

If a difference is found between the system stock and the physical count, an automatic adjustment is made to correct the discrepancy. This adjustment can either increase or decrease the stock levels based on the physical count. The source and destination for this adjustment are typically the warehouse system designated for stock counting, ensuring that the system's records are updated accordingly. The final stock count figures become the official stock levels, ensuring that the system accurately reflects the physical stock in the warehouse. This process guarantees that inventory records are aligned with actual stock, helping to maintain accurate and reliable inventory management.

### 3.6.11 Transaction Report

The screenshot shows a CRM application interface titled "Transaction Report List". The main area displays a table of transaction data. The columns are: Product, Warehouse, Movement Date, Number, Movement, Trans Type, Stock, Status, Module, Module Code, Module Number, and Warehouse From. A header row indicates "Stock: 71.00". The data table contains 16 rows of transaction details, such as movements between San Francisco, Los Angeles, Chicago, and Scrapping modules. The sidebar on the left is titled "CRM" and includes a user profile for "admin@root.com" and a navigation menu with items like "Stock Report", "Movement Reports", "Utilities", "Membership", "Profiles", and "Settings".

Product	Warehouse	Movement Date	Number	Movement	Trans Type	Stock	Status	Module	Module Code	Module Number	Warehouse From
Product: 000120250117ART Dell Servers - 32 items						Stock: 71.00					
	San Francisco	2024-06-15	187320250117VT	10.00	Out	-10.00	Confirmed	StockCount	COUNT	003420250117SC	San Francisco
	Los Angeles	2024-06-03	186220250117VT	9.00	Out	-9.00	Confirmed	StockCount	COUNT	003120250117SC	Los Angeles
	Chicago	2024-04-24	182520250117VT	4.00	In	+4.00	Confirmed	StockCount	COUNT	002220250117SC	StockCount
	Los Angeles	2024-02-08	178520250117VT	7.00	In	+7.00	Confirmed	StockCount	COUNT	001220250117SC	StockCount
	Chicago	2024-09-08	164320250117VT	6.00	Out	-6.00	Confirmed	Scraping	SCR	005220250117SCR	Chicago
	Chicago	2024-09-08	164220250117VT	7.00	Out	-7.00	Confirmed	Scraping	SCR	005220250117SCR	Chicago
	San Francisco	2024-03-28	148220250117VT	8.00	Out	-8.00	Confirmed	Scraping	SCR	001320250117SCR	San Francisco
	Los Angeles	2024-02-27	146420250117VT	1.00	Out	-1.00	Confirmed	Scraping	SCR	000920250117SCR	Los Angeles
	Los Angeles	2024-12-20	139320250117VT	2.00	Out	-2.00	Confirmed	NegativeAdjustment	ADJ-	007020250117ADJ-	Los Angeles
	San Francisco	2024-11-26	136020250117VT	2.00	Out	-2.00	Confirmed	NegativeAdjustment	ADJ-	006120250117ADJ-	San Francisco
	New York	2024-02-03	114920250117VT	2.00	Out	-2.00	Confirmed	NegativeAdjustment	ADJ-	000720250117ADJ-	New York
	Chicago	2025-01-05	112320250117VT	6.00	In	+6.00	Confirmed	PositiveAdjustment	ADJ+	007820250117ADJ+	Adjustment
	New York	2024-07-05	098020250117VT	8.00	In	+8.00	Confirmed	PositiveAdjustment	ADJ+	004120250117ADJ+	Adjustment
	Los Angeles	2024-07-05	097920250117VT	7.00	In	+7.00	Confirmed	PositiveAdjustment	ADJ+	004120250117ADJ+	Adjustment

The Transaction Report in the inventory module provides a comprehensive overview of all inventory transactions within the system. This report presents data in a tabular format, displaying essential information such as the product involved, transaction date, transaction number, quantity, and transaction type. The transaction type is clearly labeled as either "Plus," indicating an increase in stock within the warehouse, or "Minus," which shows a reduction in stock. The report also specifies the module that initiated the transaction, such as Delivery Order, Goods Receive, Adjustment, and others. This allows users to track and monitor the source and destination of inventory movements across various processes.

Furthermore, the report provides valuable insights into the flow of goods between warehouses, whether physical or system-based. For example, a Delivery Order shows the movement of products from a physical warehouse to a system warehouse, such as the customer warehouse. Similarly, Scrapping transactions reflect a transfer from a physical warehouse to a system warehouse named "Scrapping." The report also captures warehouse-to-warehouse transfers, where inventory moves between two physical warehouses. By including all these details, the Transaction Report helps businesses monitor inventory flow, understand stock movements, and ensure accurate inventory management across all warehouse locations.

### 3.6.12 Stock Report

Warehouse	Product Number	Stock	Status	Created At UTC
Chicago	000620250117ART	+19.00	Confirmed	2025-01-17 07:22
Los Angeles	000620250117ART	-17.00	Confirmed	2025-01-17 07:22
San Francisco	000620250117ART	+42.00	Confirmed	2025-01-17 07:22
New York	000620250117ART	+34.00	Confirmed	2025-01-17 07:22
Product Name: Dell Desktop Computers - 4 items				
San Francisco	000220250117ART	+15.00	Confirmed	2025-01-17 07:22
Chicago	000320250117ART	+63.00	Confirmed	2025-01-17 07:22
Los Angeles	000220250117ART	+41.00	Confirmed	2025-01-17 07:22
New York	000220250117ART	+55.00	Confirmed	2025-01-17 07:22
Product Name: Dell Keyboard - 4 items				
Los Angeles	001220250117ART	+6.00	Confirmed	2025-01-17 07:22
San Francisco	001220250117ART	+1.00	Confirmed	2025-01-17 07:22
Chicago	001220250117ART	-33.00	Confirmed	2025-01-17 07:22
New York	001220250117ART	+24.00	Confirmed	2025-01-17 07:22
Product Name: Dell Laptops - 4 items				
Stock: 78.00	Stock: 174.00	Stock: -2.00	Stock: 122.00	
Items per page: 50   Page: 1 of 2 pages (64 items)				

The Stock Report in the inventory module provides a real-time snapshot of the actual stock available at a specific point in time. This report is dynamic and can change when generated at different times, reflecting the most up-to-date inventory status. It serves as a critical tool for businesses to monitor stock levels and assess inventory availability. The report is presented in a tabular grid format, making it easy to read and analyze. Users can export the data to Excel for further analysis, allowing them to manipulate the data and generate insights tailored to their specific needs.

The primary information displayed in the Stock Report includes the product name, warehouse name, and the actual stock quantity at the time the report is generated. This layout ensures clarity and enables businesses to quickly identify inventory levels across various warehouses. By having a real-time, accurate view of stock quantities, businesses can make informed decisions on restocking, order fulfillment, and overall inventory management. The ability to export the data further enhances the report's usefulness, providing flexibility for deeper analysis and reporting.

### 3.6.13 Movement Reports

The screenshot displays a Movement Report List page from a CRM application. The interface includes a left sidebar with navigation links such as Unit Measure, Product Group, Product, Warehouse, Transfer Out, Transfer In, Positive Adjustment, Negative Adjustment, Scrapping, Stock Count, Transaction Report, Stock Report, and Movement Reports. The main content area shows a detailed pivot table of product movements. The columns are labeled: ADJ+, ADJ-, COUNT, DO, GR, PRN, SCR, SRN, TO-IN, TO-OUT, and Grand Total. The rows are categorized by transaction type (e.g., 000120250117ART De...) and warehouse (e.g., Chicago, Los Angeles, New York, San Francisco). The data provides a breakdown of stock levels and transaction types for each warehouse.

	ADJ+	ADJ-	COUNT	DO	GR	PRN	SCR	SRN	TO-IN	TO-OUT	Grand Total
000120250117ART De...	35	-6	-8	-2	113		-22	3	1	-43	71
Chicago	6		4	-2	30		-13	3		-13	15
Los Angeles	7	-2	-2		47		-1			-22	27
New York	13	-2							1	-7	5
San Francisco	9	-2	-10		36		-8			-1	24
000220250117ART De...	51	-15	-10	-12	207		-27	4		-24	174
Chicago	5	-6	-11	-3	94		-6			-10	63
Los Angeles		-3		-7	58		-1	4		-10	41
New York	8	-4			55					-4	55
San Francisco	38	-2	1	-2			-20				15
000320250117ART De...	11	-4	106	-14	53		-30	4	12	-16	122
Chicago					8		29			9	27
Los Angeles	6	-3	26		24				4	-16	41
New York					-2						-2
San Francisco		-1	80	-4			-22			3	56
000420250117ART Ne...	15	-2	12	-10	138		-12			-14	127
Chicago					27		-3				24
Los Angeles		-2	4	-5	40		-9			-11	17
New York					-2	71				3	66
San Francisco	15		8	-3							20
000520250117ART Ro...	14	-9	8		35		-39			-29	-20
Chicago	5	-2					-16			-7	-20
Los Angeles		-4	8		35						39
New York	9						-8			-14	-13
San Francisco		-3					-15			-8	-26
000620250117ART An...	24	-9	-10	-12	129		-24	11	9	-40	78

The Movement Report in the inventory module provides a detailed overview of product movements, both in terms of quantity and transaction types. This report is essential for tracking the flow of inventory, offering insights into how products are being added to or removed from stock across different warehouses. The data is presented in a pivot table format, with products and warehouses as the primary rows, while transaction categories are displayed as columns extending horizontally. This format allows users to easily analyze which transactions occurred for a specific product in a particular warehouse and the corresponding quantities involved.

Transaction categories in the Movement Report typically include adjustment, stock count, delivery order, goods receive, purchase return, and sales return. By summarizing these categories in a pivot format, the report provides a clear and concise view of all inventory activities for each product and warehouse. This enables businesses to identify patterns, trends, and potential issues in inventory management. The Movement Report is a powerful tool for maintaining control over stock movements, helping organizations ensure accuracy and transparency in their inventory operations.

## 3.7 Utilities

### 3.7.1 Booking Group

Name	Description	Created At UTC
Electronic		2025-01-17 07:21
Room		2025-01-17 07:21
Vehicle		

The Booking Group feature in the utilities module allows businesses to create and manage master data for booking groups. These booking groups serve as categories that can be used when managing booking resources, providing an organized way to group related resources. For example, booking groups can include categories such as Electronics, Rooms, and Vehicles, helping users quickly identify and allocate the appropriate resources for specific needs.

Each booking group is recorded with two key pieces of information: the name of the booking group and a description providing additional context or details about its purpose. By organizing resources into booking groups, businesses can streamline their resource management processes, improve efficiency, and ensure clarity when assigning or reserving resources. This feature is particularly useful in environments where multiple types of resources are managed and tracked.

### 3.7.2 Booking Resource

The screenshot shows the CRM application interface. On the left is a sidebar with navigation links like 'My Entry', 'Sales', 'Purchase', 'Inventory', 'Utilities', 'Booking Group', 'Booking Resource' (which is selected), 'Booking Manager', 'Booking Scheduler', 'Program Resource', 'Program Manager', 'Program Kandian', 'Todo', 'Todo Item', 'Membership', 'Profiles', and 'Settings'. The main area is titled 'Booking Resource List' and shows a table of resources categorized by booking group. A modal window titled 'Edit Booking Resource' is open, showing fields for 'Name' (Google Chromecast) and 'Booking Group' (Electronic). The table below lists resources grouped by booking group:

Booking Group	Name	Description	Created At UTC
Booking Group: Electronic - 9 Items	Bose Speaker		2025-01-17 07:21
	Google Chromecast		
	Apple TV		
	Sony Projector		
	JBL Speaker		
	Logitech Webcam		
	Samsung Monitor 49		
	Microsoft Webcam		
	Epson Projector		
Booking Group: Room - 9 Items	Studio One		2025-01-17 07:21
	Studio Two		2025-01-17 07:21
	Conference Three		2025-01-17 07:21
	Conference One		2025-01-17 07:21
	Conference Two		2025-01-17 07:21

At the bottom right of the main area, it says '1 of 1 pages (27 items)'. The footer of the page includes '© 2025 Acme Corp. All Right Reserved.'

The Booking Resource feature in the utilities module allows businesses to define resources that can be booked for various purposes. When creating a booking resource, users must assign it to a specific booking group, enabling better categorization and analysis of the resources. For instance, if the resources are rooms such as "Studio One," "Studio Two," "Conference One," and "Conference Two," they can be grouped under the "Room" booking group. This categorization ensures that resources are organized and easily accessible based on their type.

Another example is when the resources are vehicles such as "Audi One," "Audi Two," "BMW One," and "BMW Two." These resources can be grouped under the "Vehicle" booking group. By associating each resource with a booking group, businesses can efficiently manage their resources, streamline the booking process, and perform detailed analysis of resource usage across categories. This feature is essential for organizations that rely on effective resource allocation and utilization.

### 3.7.3 Booking Manager

The screenshot shows a CRM application window titled "Booking List". On the left, there's a sidebar with navigation links like "Sales", "Purchase", "Inventory", "Utilities", "Booking Manager", "Booking Scheduler", "Program Resource", "Program Manager", "Program Kanban", "Todo", "Todos Item", "Membership", "Profiles", and "Settings". The main area has tabs for "Edit Booking" and "Scheduler View". The "Edit Booking" tab is active, displaying a form with fields for "Subject" (006620250117BOK), "Location" (404 Cedar St. San Antonio), "Start Time" (2025-06-02 09:00), "End Time" (2025-06-02 17:00), "Booking Resource" (Logitech Webcam), "Status" (Draft), and "Description". Below the form is a table showing booking details for "Microsoft Webcam" and "Epson Projector". The table includes columns for Name, Number, Location, Start Date, End Date, Status, and Last Modified. At the bottom, there are buttons for "Close" and "Save". The status bar at the bottom right indicates "1 of 2 pages (72 items)".

Name	Number	Location	Start Date	End Date	Status	Last Modified	
Microsoft Webcam	003120250117BOK	003120250117BOK	404 Cedar St. San Antonio	2025-03-09 11:00	2025-03-09 18:00	Done	2025-01-17 07:21
Epson Projector	002920250117BOK	002920250117BOK	123 Main St. New York	2025-03-26 09:00	2025-03-26 12:00	Confirmed	2025-01-17 07:21

The Booking Manager in the utilities module is a feature designed to record and manage scheduling agendas for booking resources effectively. It allows users to capture essential details such as the location, start time, end time, the specific booking resource being scheduled, and the status of the booking—whether it is "Done," "In Progress," or "Draft." This feature ensures that all bookings are organized and can be easily tracked, helping businesses manage their resources more efficiently.

The Booking Manager is presented in a tabular grid format, providing a clear and structured overview of all booking entries. Additionally, the grid can be exported to an Excel file, enabling further analysis or offline use. This export functionality is particularly useful for generating reports, reviewing booking trends, or sharing scheduling data with other team members. The Booking Manager is an essential tool for organizations requiring streamlined resource scheduling and tracking capabilities.

### 3.7.4 Booking Scheduler

The screenshot shows the Booking Scheduler List interface. The left sidebar includes links for Invoicing, Sales, Purchase, Inventory, Utilities (Booking Group, Booking Resource, Booking Manager), and Booking Scheduler. The main area displays a grid for January 2025, with columns for dates from Jan 1 to Jan 20 and rows for vehicle types like Vehicle, Electronic, and others. Specific bookings are shown as colored boxes with start and end times. A modal window is open for a booking on January 10, 2025, from 9:00 AM to 1:00 PM, located at 505 Walnut St, San Diego, assigned to BMW 03. The modal also shows an edit and delete button.

The Booking Scheduler in the utilities module is a visual representation of the schedule managed through the Booking Manager. It provides a dynamic grid view that allows users to see booking timelines for resources at a glance. The scheduler offers multiple viewing options, including timeline day, timeline week, timeline work week, timeline month, and agenda views. These flexible display modes make it easier to identify which resources are actively booked on specific dates, helping users plan and allocate resources efficiently.

By integrating with the Booking Manager, the Booking Scheduler ensures that all scheduled bookings are accurately reflected in the grid. This visual approach provides a more intuitive way to track bookings compared to the traditional tabular grid. Users can quickly identify booking overlaps, resource availability, and scheduling gaps, streamlining the resource management process. The Booking Scheduler is an invaluable tool for organizations that require an at-a-glance overview of their resource usage and scheduling activities.

### 3.7.5 Program Resource

The screenshot shows the CRM application's interface. On the left is a sidebar with navigation links like Sales, Purchase, Inventory, Utilities, Program Resource (which is selected), Program Manager, Program Kanban, Todo, Membership, Profiles, and Settings. The main area is titled "Program Resource List". It features a table with columns: Name, Description, and Created At UTC. A row for "Sales Marketing" is selected. An "Edit" button is highlighted. A modal window titled "Edit ProgramResource" is open, showing a "Main Info" section with a "Name" field containing "Sales Marketing" and a "Description" field which is empty. At the bottom of the modal are "Close" and "Save" buttons. The status bar at the bottom right indicates "1 of 1 pages (5 items)".

The Program Resource feature in the utilities module is designed to create and manage a master list of program resources. These resources serve as foundational data that can later be utilized within the Program Manager. By recording program resources in this module, businesses can define and categorize the assets or items needed for various programs, ensuring consistency and accuracy across operations. Key details captured in the Program Resource include the resource name and description, making it easier to identify and reference them during program planning and execution.

Once program resources are recorded, they can be linked to entries in the Program Manager. In the Program Manager, users can specify which program resources are being utilized, track their status (e.g., Draft or Confirmed), and assign priority levels, such as Low, High, or Critical. This structured approach ensures that resource allocation is well-documented and prioritized based on program requirements, improving the efficiency and reliability of program execution.

### 3.7.6 Program Manager

The screenshot shows a CRM application interface. On the left is a sidebar with navigation links for Sales, Purchase, Inventory, Utilities (Booking Group, Booking Resource, Booking Manager, Booking Scheduler, Program Resource), Program Manager, Program Kanban, Todo, Todo Item, Membership, Profiles, and Settings. The main area is titled "Program Manager List". It features a table with columns: Number, Title, Resource, Status, Priority, and Created At UTC. A modal window titled "Edit Program Manager" is open over the grid, showing fields for Main Info (Title, Resource, Status, Priority, Summary), and a detailed view below it. The detailed view table has columns: ID, Title, Resource, Status, Priority, and Created At UTC. The bottom right of the screen shows a footer with copyright information.

The Program Manager in the utilities module is a tool designed to effectively manage work programs by recording their status and priority. Users can select program resources that have been previously registered in the Program Resource module, ensuring proper allocation and tracking of necessary assets. The Program Manager provides a structured tabular grid view, where key details such as program name, resource, status, and priority (e.g., Low, High, or Critical) are displayed. This grid can also be exported to an Excel file for further analysis or reporting, enabling businesses to evaluate program performance and trends more effectively.

In addition to the tabular grid view, the Program Manager includes a Kanban-style interface for a more visual representation of program statuses. This Kanban view helps users track the progress of work programs as they move through various stages, such as Draft, In Progress, or Completed. The pivotal layout of the Kanban board makes it easier to manage workflows, prioritize tasks, and monitor progress at a glance, ensuring efficient program execution and better collaboration among team members. This dual-view capability enhances the usability and functionality of the Program Manager, making it a versatile tool for project and program management.

### 3.7.7 Program Kanban

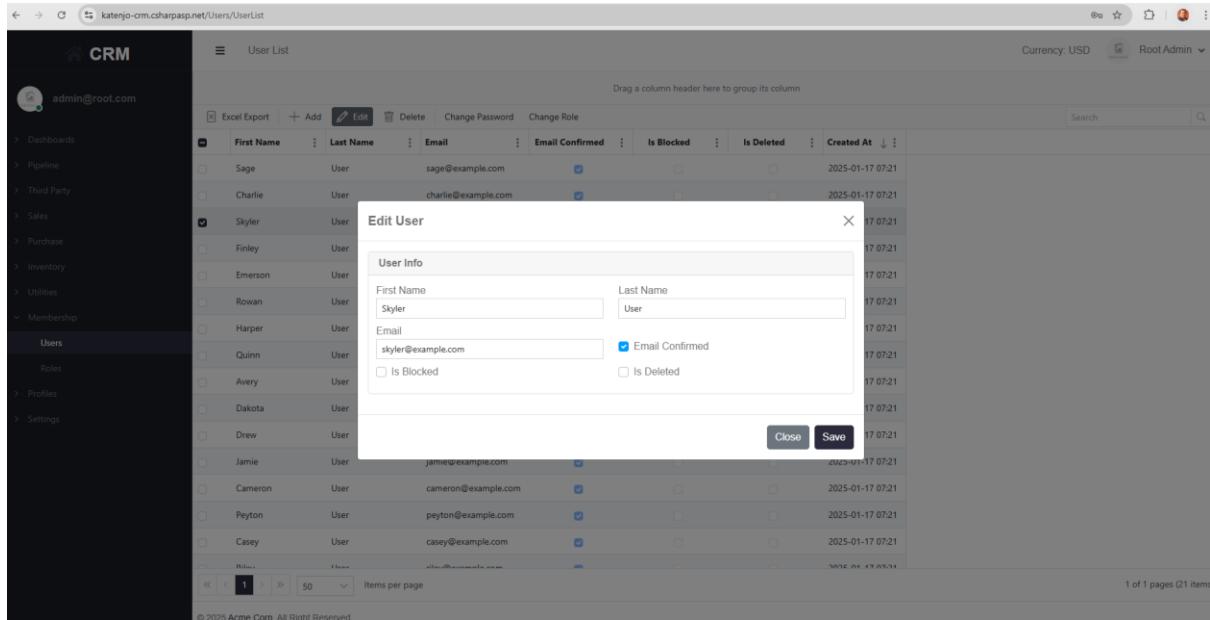
The screenshot shows the 'Program Kanban List' page from a CRM application. The left sidebar includes navigation links for admin@root.com, Finance Accounting, Human Resource, and Utilities (Booking Group, Booking Resource, Booking Manager, Booking Scheduler, Program Resource, Program Manager, Program Kanban, Todo, Todo Item, Membership, Profiles, Settings). The main area displays a Kanban board with five columns: Draft (blue), Confirmed (orange), OnProgress (purple), Done (green), and Cancelled (grey). Under the 'Finance Accounting' section, there are 19 items. Each item card contains a unique ID, a description, and a priority level (Normal, Low, Medium, High, Critical). Below the main board, there are two additional sections: 'Human Resource' (17 items) and 'B/CANL' (4 items). The status bar at the bottom indicates '© 2025 Acme Corp. All Right Reserved.'

The Program Kanban in the utilities module is a visual representation of the Program Manager in a Kanban view format. In this view, statuses such as Draft, Confirmed, On Progress, Done, and Cancelled are displayed as pivot columns, while cards beneath these columns provide detailed information about each work program, including its description and priority level (Low, Medium, High, Critical).

To enhance clarity, a colored sidebar is added to each card, visually distinguishing the priority levels, making it easier for users to identify and manage tasks at a glance. This intuitive layout simplifies workflow tracking and prioritization, ensuring efficient management of work programs.

## 3.8 Membership

### 3.8.1 Users

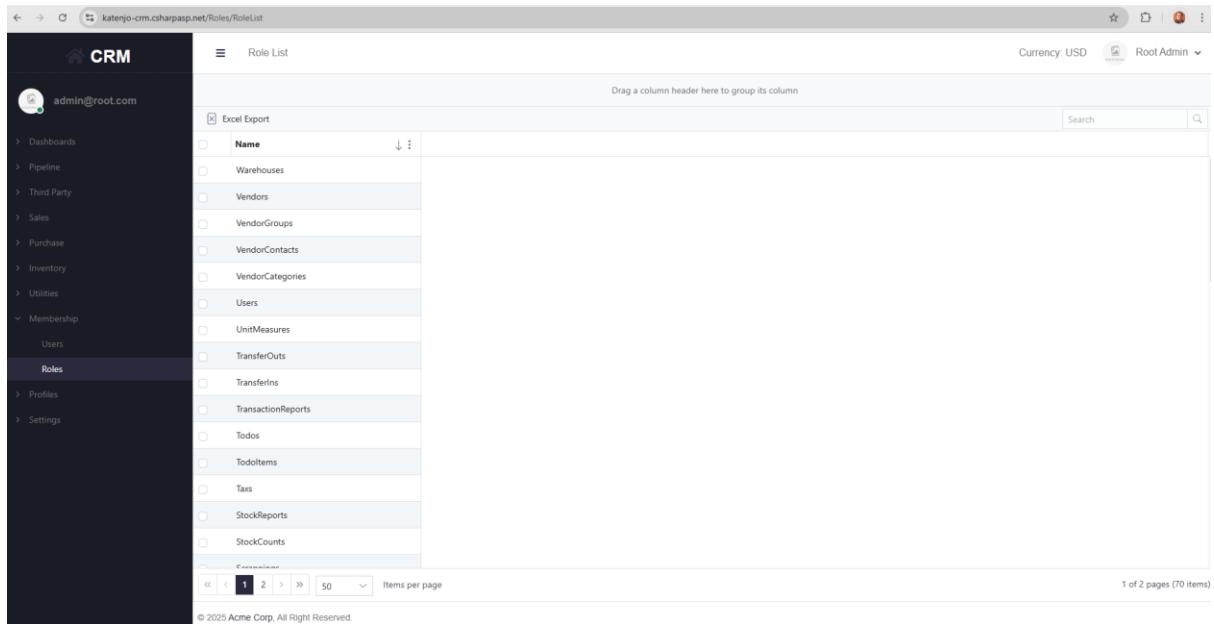


The screenshot shows a CRM application interface with a sidebar navigation menu. The 'Membership' section is selected, and the 'Users' sub-section is active. A modal window titled 'Edit User' is open over a grid of user records. The modal contains fields for First Name (Skyler), Last Name (User), Email (skyler@example.com), and Email Confirmation (checked). It also includes checkboxes for 'Is Blocked' and 'Is Deleted'. The main grid shows 21 items per page, with the current page being 1. The status bar at the bottom indicates '1 of 1 pages (21 items)'.

The **User Management** feature in the membership module is designed to empower administrators with tools to efficiently manage users within the system. Through this feature, administrators can add new users, ensuring they are properly registered and assigned initial roles. Additionally, administrators have the ability to edit user details, such as updating names, changing roles, or resetting passwords, to ensure user information stays accurate and up-to-date.

This feature also allows administrators to block users when necessary, providing control over who has access to the system. By offering comprehensive user management capabilities, this module ensures that user accounts are well-maintained, roles are properly assigned, and security measures are upheld, creating a robust and organized user management process.

### 3.8.2 Roles

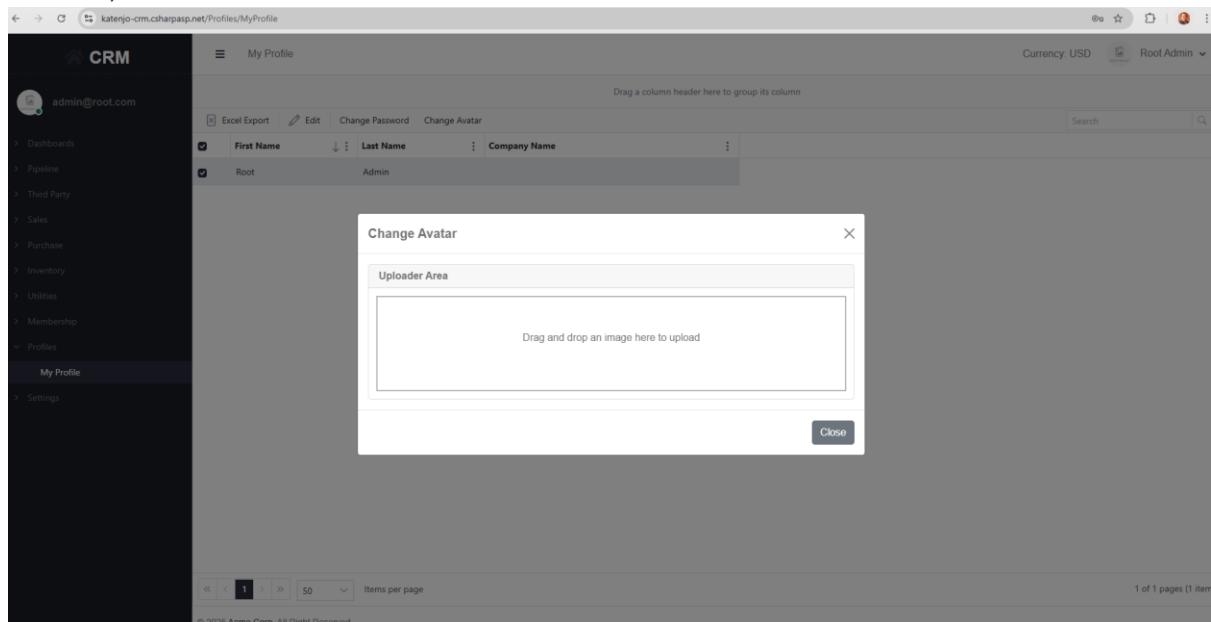


The screenshot shows the 'Role List' page in a CRM application. The left sidebar has a dark theme with categories like Dashboards, Pipeline, Third Party, Sales, Purchase, Inventory, Utilities, Membership, Users, and Roles. 'Roles' is selected. The main area has a light background with a header 'Role List' and a sub-header 'Drag a column header here to group its column'. There's an 'Excel Export' button and a search bar. A table lists roles with columns for Name (sorted by name), Description, and Actions. The table includes rows for Warehouses, Vendors, VendorGroups, VendorContacts, VendorCategories, Users, UnitMeasures, TransferOuts, TransfersIn, TransactionReports, Todos, TodoItems, Taxs, StockReports, and StockCounts. At the bottom, there are navigation links (first, previous, next, last), a page size selector (50 items per page), and a footer note: '© 2025 Acme Corp. All Right Reserved.' and '1 of 2 pages (70 items)'.

The **Roles** page in the membership module displays a list of all the roles available within the system. These roles define the permissions that can be assigned to users, ensuring they have the appropriate access to system features and functionalities. Administrators can manage these roles by adding new ones or removing existing ones, tailoring them to the organization's needs. These roles can then be assigned or unassigned to specific users through the **User Management** menu, providing flexibility and control over user access within the system.

## 3.9 Profiles

### 3.9.1 My Profile

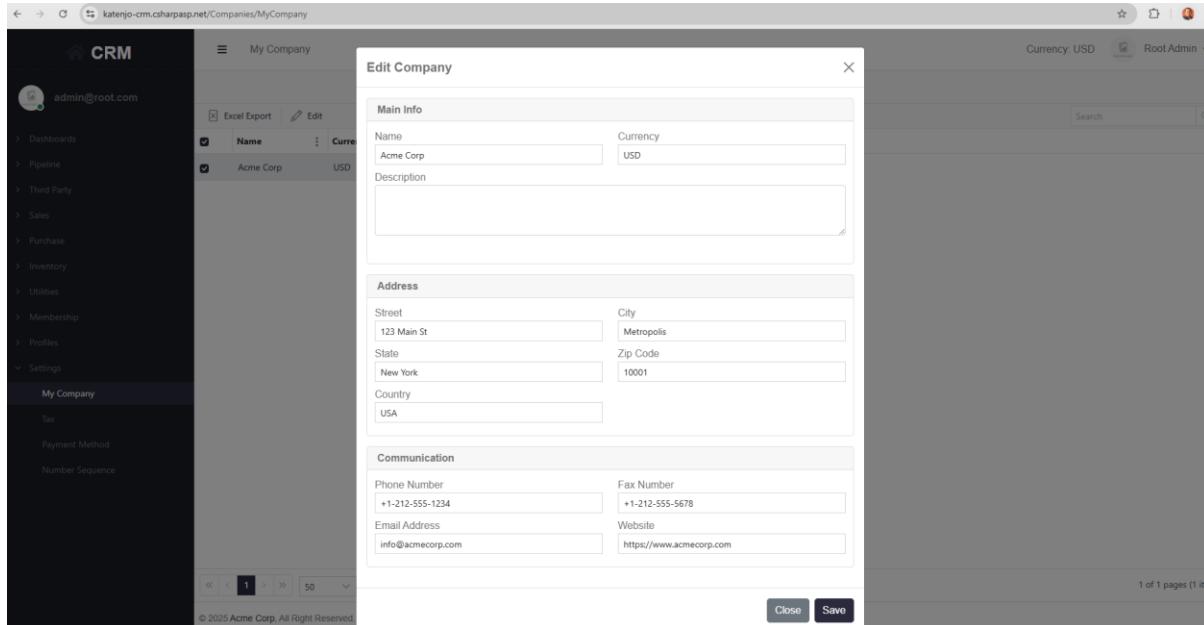


The screenshot shows the 'My Profile' section of the Acme CRM application. On the left is a dark sidebar with navigation links: Dashboards, Pipeline, Third Party, Sales, Purchase, Inventory, Utilities, Membership, Profiles (which is expanded), My Profile (selected), and Settings. The main area has a title 'My Profile' and a sub-section 'Change Avatar'. A table lists one profile entry: First Name (Root) and Last Name (Admin). Below the table is a modal window titled 'Change Avatar' with a heading 'Uploader Area' and a large rectangular box with the placeholder text 'Drag and drop an image here to upload'. At the bottom of the modal is a 'Close' button. The footer of the page includes standard navigation icons, a currency selector (USD), a user dropdown (Root Admin), a search bar, and copyright information: '© 2025 Acme Corp. All Rights Reserved.'

The **My Profile** section in the Profiles module allows currently logged-in users to manage and update their personal information within the system. Through this feature, users can make changes such as updating their name, changing their password for security purposes, and uploading a new avatar to personalize their profile. This functionality ensures that users have control over their personal data and can keep their profile information up to date with ease.

## 3.10 Settings

### 3.10.1 My Company



The **My Company** section within the Settings module provides a dedicated space for managing specific information about the company using the system. This feature allows administrators to update essential company details, ensuring that all records and documents generated by the system reflect accurate and up-to-date information. Key fields include the company's name, a brief description, the currency used for transactions, and the complete address, such as street, city, state, zip code, and country. Additionally, communication details like phone number and email address can also be configured in this section.

The information entered in the **My Company** section is prominently utilized in the headers of printable documents, including PDF exports. This ensures that every document created through the system has a professional appearance and accurately represents the company's identity. By maintaining comprehensive and precise company details, businesses can streamline their branding and communication efforts while ensuring consistency across all system-generated documentation.

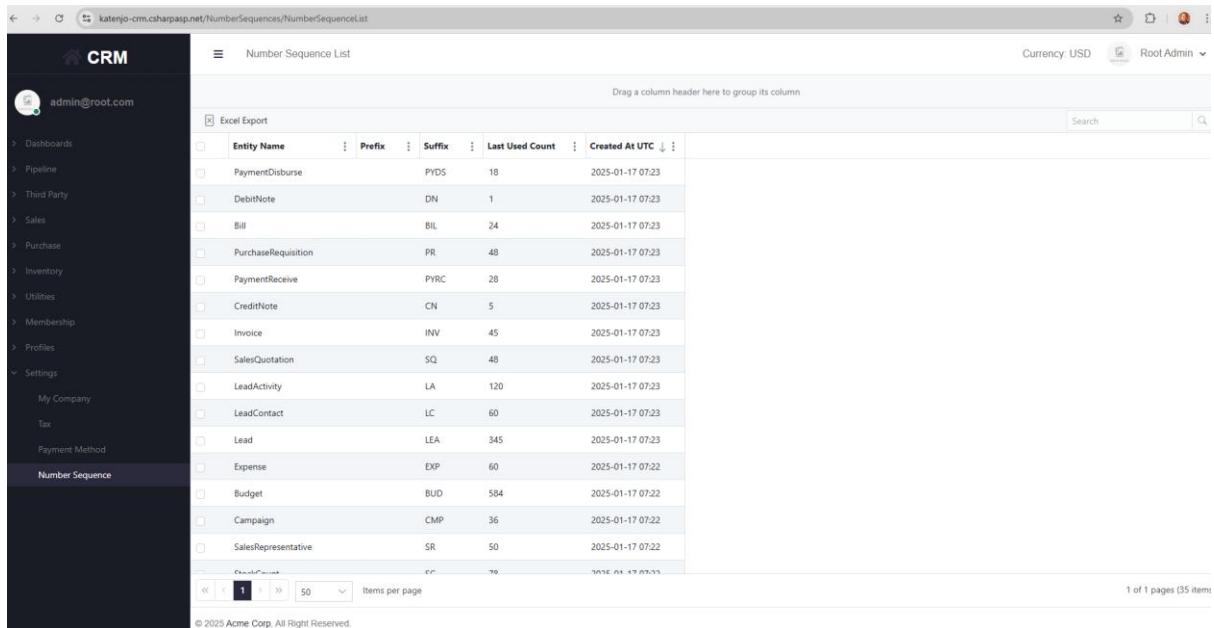
### 3.10.2 Tax

Name	Percentage	Description	Created At UTC
T20	20.00		2025-01-17 07:21
T15	15.00		2025-01-17 07:21
T10	10.00		2025-01-17 07:21
NOTAK	0.00		2025-01-17 07:21

The **Tax** section within the Settings module is designed to manage the master data for tax rates used in various transactions, such as sales orders and purchase orders. This feature allows businesses to define and maintain accurate tax information, ensuring compliance with applicable regulations and simplifying the application of tax rates during transactions. The primary fields in the tax master data include the tax name, the tax rate expressed as a percentage, and a description providing additional details about the tax.

By maintaining a centralized repository of tax rates, the **Tax** section helps streamline the transaction process by automatically applying the correct tax rates based on the defined data. This reduces manual errors and ensures consistency in tax calculations across all transactions. With the ability to manage and update tax details easily, businesses can adapt to changing tax regulations efficiently and maintain accurate financial records.

### 3.10.3 Number Sequence



The screenshot shows the CRM application's Number Sequence List page. The left sidebar has a dark theme with categories like Dashboards, Pipeline, Third Party, Sales, Purchase, Inventory, Utilities, Membership, Profiles, Settings (with sub-options My Company, Tax, Payment Method), and Number Sequence (which is currently selected). The main content area is titled "Number Sequence List" and contains a table with columns: Entity Name, Prefix, Suffix, Last Used Count, and Created At UTC. The table lists various entities with their corresponding prefix/suffix and the last used count. An "Excel Export" button is at the top left of the table, and a search bar is at the top right. The bottom of the page includes navigation links (back, forward, search), a "Items per page" dropdown set to 50, and a footer note: "© 2025 Acme Corp. All Right Reserved." and "1 of 1 pages (35 items)".

Entity Name	Prefix	Suffix	Last Used Count	Created At UTC
PaymentDisburse	PYDS	18	2025-01-17 07:23	
DebitNote	DN	1	2025-01-17 07:23	
Bill	BIL	24	2025-01-17 07:23	
PurchaseRequisition	PR	48	2025-01-17 07:23	
PaymentReceive	PYRC	28	2025-01-17 07:23	
CreditNote	CN	5	2025-01-17 07:23	
Invoice	INV	45	2025-01-17 07:23	
SalesQuotation	SQ	48	2025-01-17 07:23	
LeadActivity	LA	120	2025-01-17 07:23	
LeadContact	LC	60	2025-01-17 07:23	
Lead	LEA	345	2025-01-17 07:23	
Expense	EXP	60	2025-01-17 07:22	
Budget	BUD	584	2025-01-17 07:22	
Campaign	CMP	36	2025-01-17 07:22	
SalesRepresentative	SR	50	2025-01-17 07:22	

The **Number Sequence** section within the **Settings** module is used to monitor and track the numbers used when creating documents such as sales orders or purchase orders. This feature ensures that all document numbers are generated in a systematic and consistent manner, preventing duplicates and ensuring proper record-keeping. The information captured in the number sequence report includes the entity name, the prefix and suffix applied to the document number, and the last used count, which shows the most recent number assigned.

The report generated by the number sequence feature is available for download in Excel format, making it easy for users to review and analyze the document numbering history. Importantly, this report is read-only, meaning no editing can be performed, ensuring the integrity of the number sequence. This functionality is crucial for businesses to maintain a clear and auditable trail of document numbers, which aids in tracking and preventing errors in document creation across various processes.

Thank You!