User Manual

Project Management & Maintenance System

Prepared for
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1. GENERAL INFORMATION

1.1 PURPOSE OF THE DOCUMENT

The purpose of this user manual is to help the users in all activities related to WE ONE's Project Management and Maintenance System application. The document outlines the features of the application and describes each of the screens in detail.

1.2 SCOPE OF THE DOCUMENT

This document is limited to provide required information to use PMMS application. The document will provide information about the functions and capabilities of the application.

1.3 INTENDED AUDIENCE

This document is intended for WE ONE team Business users involved in managing and operating the application.

1.4 ABBREVIATIONS & ACRONYMS

Here is the list of acronyms used throughout the document:

- Project Management and Maintenance System (PMMS)

2. APPLICATION OVERVIEW

WE ONE's PMMS is a web-based application mainly focussed on providing the functionality for the business users to manage the project related activities. PMMS application covers all the aspects of the project management activities. It not ends only with the project management but also extends its feature to handle the maintenance and inventory operations more efficiently with complete automation of data. A single unified application facilitates the business users by providing the functionality to manage project, inventory and maintenance at a higher extent.

PMMS is a three-part solution comprises of the following applications:

- Web Application
- Customer Portal
- Technician Mobile Application

3. WEB APPLICATION

The web application runs on a server and allows the user to create multiple master records and manage various modules pertaining to the project, inventory and maintenance operations. The web application can be accessed from different other PCs available on the same network / through the internet.

Following are the list of modules available in the PMMS web application

- ✓ Master Module
- ✓ Project Module
- ✓ Inventory Module
- ✓ Maintenance Module
- ✓ Report Module
- ✓ Tools

3.1 LOGIN

This screen allows the user to login to the PMMS application using their login credentials. The system validates the username and password and allows the user to access the information based on their user role.

Fields	Description
User Name	Valid Username should be entered in this field by the user
Password	Valid Password should be entered in this field by the user
Remember Me - checkbox	By enabling this, user credentials will be saved to the system and keep the user signed in to the application
Login – Action button	Click this action button allows the user to login to the application by validating the specified user credentials.

3.2 MAINMENU

The main menu displays the list of functionalities offered by the application. A logged in user can interact with the application using these menus and do the transactions.

3.3 COMMON FEATURES

This section details out the common functionalities of the master and transaction menu that include List, Create, Edit, Delete and View document which is similar across all screens.

3.3.1 LIST (OR) INDEX SCREEN

List screen on masters and transaction landing page will be displayed as a grid as shown below.

Fields	Description
Add New Record	Clicking on this icon will allows the user to create a new record.
View (or) Details	Clicking on this icon will allows the user to view the record.
Edit	Clicking on this icon will allows the user to edit the record
Delete	Clicking on this icon will allows the user to delete the record
Export	Export option allows to export the details listed in the grid to a file in preferred format (Excel, PDF).
Customized Grid Column	It is used to change the preferred fields to be displayed in the list

3.3.2 ADD NEW RECORD

Add new record is a functionality provided for the business users to create new records in the application. Most of the screen in the PMMS application is featured with the create new record option.

STEPS TO CREATE NEW RECORD

- Click on icon, that redirects the user to the record create page.
- In the create page, user can specify all the detail.
- By clicking on "**Save**" the record will be saved.
- Clicking on "**Cancel**" will abort the operation.

3.3.3 VIEW THE RECORD

After creating a record, it can be viewed to ensure that created details are stored in the system correctly. This is done using details icon available against each record in the grid.

STEPS TO VIEW THE RECORD

- Click on icon, that redirects the user to record details page.
- User can able to view the complete details of the selected record.
- Clicking on "**Cancel**" will redirect the user back to the homepage.

3.3.4 EDIT A RECORD

Edit icon can be seen against each record in the grid. A record can be modified after creating it with some limitation.

STEPS TO EDIT THE RECORD

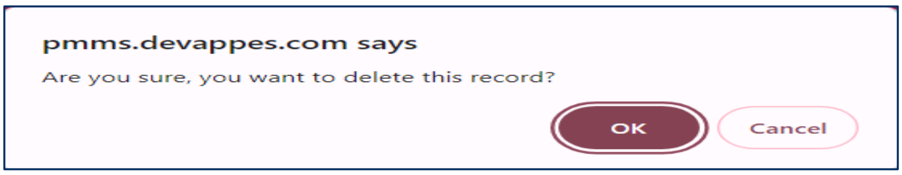
- Click on icon, that redirects the user to record edit page.
- User cam able to do certain modifications to the available records.
- Clicking on "**Save"** will allows the user to save the changes done and by clicking on "**Cancel"** will abort the changes.

3.3.5 DELETE A RECORD

A record can be deleted using delete icon seen against each record in the grid.

STEPS TO DELETE THE RECORD

- Clicking on icon redirects the user to a pop-up as shown below.



- By clicking "**OK"** the record will get deleted, and by clicking "**Cancel"** the operation will be aborted.

3.3.6 CUSTOMIZED GRID COLUMNS

Through the customized grid column feature, user can able to customize the preferred fields to be displayed in the grid.

STEPS TO CUSTOMIZE GRID COLUMNS

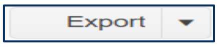
- Click on ⋮ icon, that will redirect the user to the customized grid column menu.
- From the Customized Grid column screen, user can select the preferred column from the available field section and with the help of navigation action button, the user could move them to the selected field section and can save them.

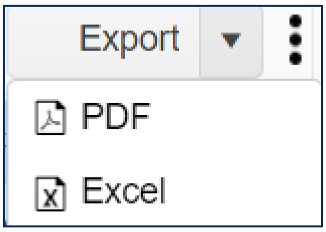
Fields	Description
Available fields	This section displays the list of available fields in the grid
►► ◄◄	This left and right navigation action button allows the user to move the selected column from available field to Selected field and vice versa.
Selected Fields	This section displays the list of selected fields to be displayed in the grid
▲ ▼	This up and down navigation action button allows the user to move the selected column to top and bottom
Save	By clicking on save the changes will be saved

3.3.7 EXPORT THE RECORD

This option allows the user to export the records displayed in the screen to an Excel/PDF format.

STEPS TO EXPORT THE RECORD

- Click on  icon from the screen, it will display the format options as shown below.



- From here, user can select from their preferred format and once selected, the file will be start download automatically.

4. MASTER MODULE

From this section, user will get the detailed understanding of the available master menu and the field data that will be captured against each master. The modules include in the master are as follows

- Category
- Company
- Item Mapping
- Country
- Warehouse
- Approval Workflow
- Reason Type
- Item
- Barcode Type
- Barcode Format
- Designation
- Maintenance Setup
- Project Setup

- Inventory Setup
- Item UOM Mapping
- Department
- Customer Setup
- Team
- Grade
- Other Activity

4.1 CATEGORY

This module, enables the user to maintain category of the items which includes, view, edit, delete, category code, hierarchical level number, etc.

View	Allows the user the view the category
Edit	Allows the user to edit the category
Delete	Allows the user to delete the category
Category Code	Enter the category code
Category Name	Enter the category name
Hierarchical Level No	Enter the hierarchical level number of the category
GL Account No	Enter the GL account number of the category
P & L Account No	Enter the P & L account number of the category
Status	Shows the status of the category
Created By	Shows who has created the category
Created On	Shows when the category was created

- By clicking the **view** option, the user can view the category

Category Code	Allows the user to view the category code
Category Name	Allows the user to view the category name

Parent Category ID	Allows the user to view the parent category ID
Hierarchical Level No	Allows the user to view the hierarchical level number
GL Account No	Allows the user to view the GL account number
P & L Account No	Allows the user to view the P and L account number

- By clicking the **edit** option, the user can edit the category

Category Code	Allows the user to edit the category code
Category Name	Allows the user to edit the category name
Parent Category ID	Allows the user to edit the parent category ID from the drop-down list
Hierarchical Level No	Allows the user to edit the hierarchical level number
GL Account No	Allows the user to edit the GL account number
P & L Account No	Allows the user to edit the P and L account number

- After editing the contents, the user can click **save** option to save the changes.

4.2 COMPANY

This module, enables the user to maintain company which includes, view, edit, delete, company code, company name, etc.

View	Allows the user the view the company
Edit	Allows the user to edit the company
Delete	Allows the user to delete the company
Company Code	Enter the company code
Company Name	Enter the company name
Status	Shows the status of the company
Created On	Shows when the company was created
Created By	Shows who has created the company

- By clicking the **view** option, the user can view the company

Company Code	Allows the user to view the company code

Company Name	Allows the user to view the company name

- By clicking the **edit** option, the user can edit the company

Company Code	Allows the user to edit the company code
Company Name	Allows the user to edit the company name
Status	Allows the user to edit the status of the company

- After editing the contents, the user can click **save** option to save the changes.

4.3 ITEM MAPPING

This module, enables the user to maintain the item mapping which includes, view, edit, delete, item code, item name, etc.

View	Allows the user to view the item mapping
Edit	Allows the user to edit the item mapping
Delete	Allows the user to delete the item mapping
Item Code	Enter the item code
Item Name	Enter the item name

- By clicking the **view** option, the user can view the item mapping which includes
  - User
  - Item Warehouse Tax Mapping
  - Item Warehouse Sales Price Mapping

4.3.1 USER

- Allows the user to view the User. By clicking the **Next** option, the user can move to the next module, **"Item Warehouse Tax Mapping".**

4.3.2 ITEM WAREHOUSE TAX MAPPING

Warehouse Code	Allows the user to view the warehouse code
Warehouse Name	Allows the user to view the warehouse name
Tax Code	Allows the user to view the tax code

Tax Name	Allows the user to view the tax name

By clicking the **Next** option, the user can move to the next module, **"Item Warehouse Sales Price Mapping".**

4.3.3 ITEM WAREHOUSE SALES PRICE MAPPING

Warehouse Code	Allows the user to view the warehouse code
Warehouse Name	Allows the user to view the warehouse name
Sales Price	Allows the user to view the sales price

- By clicking the **edit** option, the user can edit the item mapping which includes
  - User
  - Item Warehouse Tax Mapping
  - Item Warehouse Sales Price Mapping

4.3.1.1 USER

- Allows the user to **edit** the User. By clicking the **Next** option, the user can move to the next module, **"Item Warehouse Tax Mapping".**

4.3.2.1 ITEM WAREHOUSE TAX MAPPING

Warehouse Code	Allows the user to edit the warehouse code
Warehouse Name	Allows the user to edit the warehouse name
Tax	Allows the user to edit the tax code

By clicking the **Next** option, the user can move to the next module, **"Item Warehouse Sales Price Mapping".**

4.3.3.1 ITEM WAREHOUSE SALES PRICE MAPPING

Warehouse Code	Allows the user to edit the warehouse code
Warehouse Name	Allows the user to edit the warehouse name

- After making the changes, the user can click **Save** option to save the changes.

4.4 COUNTRY

This module, enables the user to maintain country which includes, view, edit, delete, country code, country name, etc.

View	Allows the user the view the country
Edit	Allows the user to edit the country
Delete	Allows the user to delete the country
Country Code	Enter the country code
Country Name	Enter the country name
Status	Shows the status of the country
Created On	Shows when the country was created
Created By	Shows who has create the country

- By clicking the **view** option, the user can view the country

Country Code	Allows the user to view the country code
Country Name	Allows the user to view the country name

- By clicking the **edit** option, the user can edit the company

Company Code	Allows the user to edit the country code
Company Name	Allows the user to edit the country name

- After editing the contents, the user can click **save** option to save the changes.

4.5 WAREHOUSE

This module, enables the user to maintain warehouse which includes, view, edit, delete, warehouse code, warehouse name, etc.

View	Allows the user the view the warehouse
Edit	Allows the user to edit the warehouse
Delete	Allows the user to delete the warehouse
Warehouse Code	Enter the warehouse code
Warehouse Name	Enter the warehouse name

Status	Shows the status of the warehouse
Created On	Shows when the warehouse was created
Created By	Shows who has created the warehouse
Company Name	Enter the company name
Country Name	Enter the country name
Tax Name	Enter the tax name
Is Bin Available	Shows whether the bin is available or not

- By clicking the **view** option, the user can view the warehouse

Warehouse Code	Allows the user to view the warehouse code
Warehouse Name	Allows the user to view the warehouse name
Warehouse Type	Allows the user to view the type of the warehouse
Country ID	Allows the user to view the country ID
Tax ID	Allows the user to view the tax ID
Is Bin Available	Allows the user to view whether the bin is available or not

- By clicking the **edit** option, the user can edit the warehouse

Warehouse Code	Allows the user to edit the warehouse code
Warehouse Name	Allows the user to edit the warehouse name
Warehouse Type	Allows the user to edit the type of the warehouse from the drop-down list
Country ID	Allows the user to edit the country ID from the drop-down list
Tax ID	Allows the user to edit the tax ID from the drop-down list
Is Bin Available	Allows the user to edit whether the bin is available or not by selecting yes or no

- After editing the contents, the user can click **save** option to save the changes.

After creating a new record in the warehouse, if the user does not click,**" Is bin available"** the new record will be saved as a line item in the **Sub Inventory** of the **Inventory Setup**.

4.6 APPROVAL WORKFLOW

This module, enables the user to maintain approval workflow which includes, view, edit, delete, module, approval work flow code, approval work flow name, etc.

View	Allows the user the view the approval workflow
Edit	Allows the user to edit the approval workflow
Delete	Allows the user to delete the approval workflow
Module Name	Enter the module name
Status	Shows the status of the approval workflow
Approval Work Flow Code	Enter the approval workflow code
Approval Work Flow Name	Enter the approval workflow name

- By clicking the **view** option, the user can view the approval workflow

Approval Module	Allows the user to view the approval module
Approval Work Flow Code	Allows the user to view the approval workflow code
Approval Work Flow Name	Allows the user to view the status of the approval workflow name
Available Approval Role	Allows the user to view the available approval roles from the list box.
Selected Approval Roles	Allows the user to view the selected approval roles from the list box.

- By clicking the **edit** option, the user can edit the approval workflow

Approval Work Flow Code	Allows the user to edit the approval work flow code
Approval Work Flow Name	Allows the user to edit the approval workflow name
Approval Module	Allows the user to edit the status of the approval module
Available Designations	Allows the user to edit the available designations from the list
Selected Designations	Allows the user to edit the selected designations from the list

- After editing the contents, the user can click **save** option to save the changes.

4.7 REASON TYPE

This module, enables the user to maintain the reason type which includes, view, edit, delete, module, reason code, reason name, etc.

View	Allows the user the view the reason type
Edit	Allows the user to edit the reason type
Delete	Allows the user to delete the reason type
Reason Code	Enter the reason code
Reason Name	Enter the name of the reason
Status	Shows the status of the approval workflow
Created By	Shows who has created the reason type
Created On	Shows when the reason type was created
Application Module Name	Enter the application module name

4.8 ITEM

This module, enables the user to maintain the item which includes, view, edit, delete, item code, item name, reorder level quantity, etc.

It will send notification to the user when the item quantity is reduced. The picking method ID can be selected by the from the drop-down list user which includes

- First Expiry First Out (FEFO)
- First In First Out (FIFO)
- Last In First Out (LIFO)

View	Allows the user the view the item
Edit	Allows the user to edit the item
Delete	Allows the user to delete the item
Item Code	Enter the item code
Item Name	Enter the name of the item
Reorder Level Qty	Enter the quantity of the reorder level
Avg Unit Price	Enter the average unit price
Status	Shows the status of the item
Created By	Shows who has created the item
Created On	Shows when the item was created

- By clicking the **view** option, the user can view the item

Item Code	Allows the user to view the item code
Item Name	Allows the user to view the item name
Category	Allows the user to view the category
Base UOM	Allows the user to view the base UOM
Item Type	Allows the user to view the item type
Reorder Level Qty	Allows the user to view the reorder level quantity
Avg Unit Price	Allows the user to view the average unit price
GL Account No	Allows the user to view the GL account number
P & L Account No	Allows the user to view the P & L account number
Picking Method	Allows the user to view the picking method
Item Track Type	Allows the user to view the item track type

RFID Available	Allows the user to view whether the RFID available or not
Is Inventory Item	Allows the user to view whether it is inventory item or not
Is Spare Parts	Allows the user to view whether it has spare parts or not
Is Dummy	Allows the user to view whether it has a dummy or not
Is Expired Item	Allows the user to view whether the item is expired or not
Expired Date	Allows the user to view the expired date of the item

- By clicking the **edit** option, the user can edit the item

Item Code	Allows the user to edit the item code
Item Name	Allows the user to edit the item name
Category	Allows the user to edit the category from the drop-down list
Base UOM	Allows the user to edit the base UOM from the drop-down list
Item Type	Allows the user to edit the item type ID from the drop-down list
Reorder Level Qty	Allows the user to edit the reorder level quantity
Avg Unit Price	Allows the user to edit the average unit price
GL Account No	Allows the user to edit the GL account number
P & L Account No	Allows the user to edit the P & L account number
Picking Method	Allows the user to edit the picking method from the drop-down list
Item Track Type	Allows the user to edit the item track type from the drop-down list
RFID Available	Allows the user to edit whether the RFID available or not by selecting yes or no

Is Inventory Item	Allows the user to edit whether it is inventory item or not by selecting yes or no
Is Spare Parts	Allows the user to edit whether it has spare parts or not by selecting yes or no
Is Dummy	Allows the user to edit whether it has a dummy or not by selecting yes or no
Is Expired Item	Allows the user to edit whether the item is expired or not by selecting yes or no
Expired Date	Allows the user to enter the date manually or by selecting the calendar button

- After editing the contents, the user can click **save** option to save the changes.

4.9 BARCODE TYPE

This module, enables the user to maintain the barcode type which includes, view, edit, delete, barcode type name, status, etc.

View	Allows the user the view the barcode type
Edit	Allows the user to edit the barcode type
Delete	Allows the user to delete the barcode type
Barcode Type Name	Enter the barcode type name
Status	Shows the status of the barcode type
Created By	Shows who has created the barcode type
Created On	Shows when the barcode type was created

- By clicking the **view** option, the user can view the barcode type.

Barcode Type Name	Allows the user the view the barcode type name

- By clicking the **edit** option, the user can edit the barcode type.

Barcode Type Name	Allows the user the edit the barcode type name

- After editing the contents, the user can click **save** option to save the changes.

4.10 BARCODE FORMAT

This module, enables the user to maintain the barcode format which includes, view, edit, delete, barcode format name, status, etc.

View	Allows the user the view the barcode format
Edit	Allows the user to edit the barcode format
Delete	Allows the user to delete the barcode format
Barcode Format Name	Enter the barcode format name
Status	Shows the status of the barcode format
Created By	Shows who has created the barcode format
Created On	Shows when the barcode format was created

- By clicking the **view** option, the user can view the barcode format.

Barcode Type	Allows the user the view the barcode type
Barcode Format Name	Allows the user to view the barcode format name
Barcode Format	Allows the user to view the barcode format

- By clicking the **edit** option, the user can edit the barcode format.

Barcode Type	Allows the user to edit the barcode type from the drop-down list
Barcode Format Name	Allows the user to edit the barcode format name
Barcode Format	Allows the user to edit the barcode format

- After editing the contents, the user can click **save** option to save the changes.

4.11 DESIGNATION

This module, enables the user to maintain the designation which includes, edit, delete, designation code, designation name, status, etc.

View	Allows the user to view the designation
Edit	Allows the user to edit the designation

Delete	Allows the user to delete the designation
Designation Code	Enter the designation code
Designation Name	Enter the designation name
Status	Shows the status of the designation
Created By	Shows who has created the designation
Created On	Shows when the designation was created

- By clicking the **view** option, the user can view the designation.

Designation Code	Allows the user to view the designation code
Designation Name	Allows the user to view the designation name
Application Module	Allows the user to view the application module

- By clicking the **edit** option, the user can edit the designation.

Designation Code	Allows the user to edit the designation code
Designation Name	Allows the user to edit the designation name
Application Module	Allows the user to edit the application module from the drop-down list

- After editing the contents, the user can click **save** option to save the changes.

4.12 MAINTENANCE SETUP

This module, enables the user to maintain the maintenance setup which includes the following:

- Priority
- Inspection LOV
- Inspection Check List Parameter
- Complaint Type
- Skill
- Activity
- Employee Skill Mapping

4.12.1 PRIORITY

This module allows the user to maintain the priority which includes view, edit, delete, priority code, priority code, priority description, status, etc.

View	Allows the user to view the priority
Edit	Allows the user to edit the priority
Delete	Allows the user to delete the priority
Priority Code	Enter the barcode priority code
Priority Description	Shows the status of the priority description
Status	Shows the status of the priority
Created By	Shows who has created the priority
Created On	Shows when the priority was created
Color Code	Enter the color code

- By clicking the **view** option, the user can view the priority.

Priority Code	Allows the user to view the priority code
Priority Description	Allows the user to view the priority description
Color Code	Allows the user to view the color code
Priority Time Limit To Complete	Allows the user to view the priority time to complete

- By clicking the **edit** option, the user can edit the priority.

Priority Code	Allows the user to edit the priority code
Priority Description	Allows the user to edit the priority description
Color Code	Allows the user to edit the color code
Priority Time Limit To Complete	Allows the user to edit the priority time to complete

- After editing the contents, the user can click **save** option to save the changes.

4.12.2 INSPECTION LOV

This module allows the user to maintain the inspection LOV which includes view, edit, delete, inspection, status, etc.

View	Allows the user to view the inspection LOV
Edit	Allows the user to edit the inspection LOV
Delete	Allows the user to delete the inspection LOV
Inspection	Enter the inspection
Status	Shows the status of the inspection LOV
Created By	Shows who has created the inspection LOV
Created On	Shows when the inspection LOV was created
Item Code	Enter the item code
Item Name	Allows the user to view the item name

- By clicking the **view** option, the user can view the inspection LOV.

Inspection	Allows the user to view the inspection
Item	Allows the user to view the item

- By clicking the **edit** option, the user can edit the inspection LOV.

Inspection	Allows the user to edit the inspection
Item	Allows the user to edit the item from the drop-down list

- After editing the contents, the user can click **save** option to save the changes.

4.12.3 INSPECTION CHECK LIST PARAMETER

This module allows the user to maintain the inspection check list parameter which includes view, edit, delete, item code, item name, status, etc.

View	Allows the user to view the inspection check list parameter
Edit	Allows the user to edit the inspection check list parameter
Delete	Allows the user to delete the inspection check list parameter
Status	Shows the status of the inspection check list parameter

Created By	Shows who has created the inspection check list parameter
Created On	Shows when the inspection check list parameter was created
Category Code	Enter the category code
Category Name	Enter the category name

- By clicking the **view** option, the user can view the inspection check list parameter.

Category	Allows the user to view the category
Inspection check list parameter Description	Allows the user to view the status of the inspection check list parameter description
Order No	Allows the user to view the order number
Search	Allows the user to view the inspection check list parameter description by searching

- By clicking the **edit** option, the user can edit the inspection check list parameter.

Category	Allows the user to edit the category
Inspection check list parameter Description	Allows the user to edit the status of the inspection check list parameter description
Order No	Allows the user to edit the order number
Search	Allows the user to edit the inspection check list parameter description by searching

- After editing the contents, the user can click **save** option to save the changes.

4.12.4 COMPLAINT TYPE

This module allows the user to maintain the complaint type which includes view, edit, delete, complaint type code, complaint type name, status, etc.

View	Allows the user to view the complaint type
Edit	Allows the user to edit the complaint type
Delete	Allows the user to delete the complaint type
Complaint Type Code	Enter the complaint type code
Complaint Type Name	Enter the complaint type name
Status	Shows the status of the complaint type
Created By	Shows who has created the complaint type
Created On	Shows when the complaint type was created

- By clicking the **view** option, the user can view the complaint type.

Complaint Type Code	Allows the user to view the complaint type code
Complaint Type Name	Allows the user to view the complaint type name
Is Preventive Maintenance	Allows the user to view whether the preventive maintenance required or not
Activity	Allows the user to view the activity
Category	Allows the user to view the category
Category Description	Allows the user to view the category description
Search	Allows the user to view the category code, category name, category description by searching

- By clicking the **edit** option, the user can edit the complaint type.

Complaint Type Code	Allows the user to edit the complaint type code
Complaint Type Name	Allows the user to edit the complaint type name
Is Preventive Maintenance	Allows the user to edit whether the preventive maintenance required or not by selecting yes or no

Activity	Allows the user to edit the activity from the drop-down list
Category	Allows the user to edit the category from the drop-down list
Category Description	Allows the user to edit the category description
Search	Allows the user to edit the category code, category name, category description by searching

- After editing the contents, the user can click **save** option to save the changes.

4.12.5 SKILL

This module allows the user to maintain the skill which includes edit, delete, skill code, skill name, status, etc.

Skill Code	Enter the skill code
Skill Name	Enter the skill name
Skill Description	Enter the skill description
Status	Shows the status of the skill
Created By	Shows who has created the complaint type
Created On	Shows when the complaint type was created

- By clicking the **view** option, the user can view the skill.

Skill Code	Allows the user to view the skill code
Skill Name	Allows the user to view the skill name
Skill Description	Allows the user to view the skill description

- By clicking the **edit** option, the user can edit the skill.

Skill Code	Allows the user to edit the skill code
Skill Name	Allows the user to edit the skill name
Skill Description	Allows the user to edit the skill description

- After editing the contents, the user can click **save** option to save the changes.

4.12.6 ACTIVITY

This module allows the user to maintain the activity which includes edit, delete, activity code, activity description, status, etc.

Activity Code	Enter the activity code
Activity Description	Enter the activity description
Status	Shows the status of the activity
Created By	Shows who has created the activity
Created On	Shows when the activity was created

- By clicking the **view** option, the user can view the activity.

Activity Code	Allows the user to view the activity code
Activity Description	Allows the user to view the activity description
Skill	Allows the user to view the skill from drop-down list
Search	Allows the user to view the skill name, skill code, skill description by searching

- By clicking the **edit** option, the user can edit the activity.

Activity Code	Allows the user to edit the activity code
Activity Description	Allows the user to edit the activity description
Skill	Allows the user to edit the skill from the drop-down list
Search	Allows the user to edit the skill name, skill code, skill description by searching

- After editing the contents, the user can click **save** option to save the changes.

4.12.7 EMPLOYEE SKILL MAPPING

This module allows the user to maintain the employee skill mapping which includes edit, delete, user name, status, etc.

Status	Shows the status of the employee skill mapping
User Name	Enter the employee skill mapping

Created By	Shows who has created the employee skill mapping
Created On	Shows when the employee skill mapping was created

- By clicking the **edit** option, the user can edit the employee skill mapping.

Employee	Allows the user to edit the employee from drop-down list
Skill	Allows the user to edit the skill from the drop-down list
Add	Allows the user to add the changes into the line item
Search	Allows the user to edit the skill name, skill code, skill description by searching

- After editing the contents, the user can click **save** option to save the changes.

4.13 PROJECT SETUP

After clicking the Navigation ➡ Master ➡ Project Setup. The Project Setup screen will be visible.

The PMMS application's master module includes the following modules:

- Project Location
- Project Category
- Project Plan Type
- Project Status
- Expense Account
- Price Sheet
- Document Category
- Document Folder
- AMC Type
- Task Type
- Project Check List Parameter
- Security Type

- Expense Account Head

4.13.1 PROJECT LOCATION

This option enables the user to maintain the location of the project which includes Project Location Code, Project Location Name, Status, etc.

View	Allows the user the view the project location
Edit	Allows the user to edit the project location
Delete	Allows the user to delete the project location
Project Location Code	Enter the project location code
Project Location Name	Enter the project location
Status	Shows the status of the project location
Created By	Shows who has created the project location
Created On	Shows the date and time in which the project was created

- By clicking the **view** option, the user can view the project.

Project Location Code	Allows the user to view the project location code
Project Location Name	Allows the user to view the project location name

- By clicking the **edit** option, the user can edit the project.

Project Location Code	Allows the user to edit the project location code
Project Location Name	Allows the user to edit the project location name

- After editing the contents, the user can click **save** option to save the changes.

4.13.2 PROJECT CATEGORY

This option enables the user, a list of project categories which includes, project category code, project category name, installation required, maintenance required, status, etc.

View	Allows the user the view the project category
Edit	Allows the user to edit the project category
Delete	Allows the user to delete the project category
Project Category Code	Enter the project category code
Project Category Name	Enter the project category name
Installation Required	Shows whether the installation is required or not
Maintenance Required	Shows whether the maintenance is required or not
Status	Shows the status of the project category
Created By	Shows who has created the project category
Created On	Shows the date and time in which the project was created

- By clicking the **view** option, the user can view the project.

Project Category Code	Allows the user to view the project category code
Project Category Name	Allows the user to view the project category name
Installation Required	Allows the user to view whether the installation is required or not
Maintenance Required	Allows the user to view whether the maintenance is required or not

- By clicking the **edit** option, the user can edit the project.

Project Category Code	Allows the user to edit the project category code

Project Category Name	Allows the user to edit the project category name
Installation Required	Allows the user to edit whether the installation is required or not by selecting yes or no
Maintenance Required	Allows the user to edit whether the maintenance is required or not by selecting yes or no

- After editing the contents, the user can click **save** option to save the changes.

4.13.3 PROJECT PLAN TYPE

This module enables the user to maintain the project plan type which includes, project plan type name, project plan type code, status, etc.

View	Allows the user the view the project plan type
Edit	Allows the user to edit the project plan type
Delete	Allows the user to delete the project plan type
Project Plan Type Code	Enter the project plan type code
Project Plan Type Name	Enter the project plan type name
Status	Shows the status of the project plan type
Created By	Shows who has created the project plan type
Created On	Shows the date and time in which the project was created

- By clicking the **view** option, the user can view the project plan type.

Project Plan Type Code	Allows the user to view the project plan type code
Project Plan Type Name	Allows the user to view the project plan type name

- By clicking the **edit** option, the user can edit the project plan type

Project Plan Type Code	Allows the user to edit the project plan type code
Project Plan Type Name	Allows the user to edit the project plan type name

- After editing the contents, the user can click **save** button to save the changes.

4.13.4 PROJECT STATUS

This module allows the user to maintain the status of the project which includes view, edit, delete, project status.

View	Allows the user the view the project status
Edit	Allows the user to edit the project status
Delete	Allows the user to delete the project status
Project Status	Enter the project status

- By clicking the **view** option, the user can view the project status.

Project Status	Allows the user to view the project status

- By clicking the **edit** option, the user can edit the project status.

Project Status	Allows the user to edit the project status

- After editing the contents, the user can click **save** button to save the changes.

4.13.5 EXPENSE ACCOUNT

This module allows the user to view and maintain the expense account of the project.

View	Allows the user the view the expense account
Edit	Allows the user to edit the expense account
Delete	Allows the user to delete the expense account
Expense Account Code	Enter the expense account code

Expense Account Name	Enter the expense account name
Status	Shows the status of the expense account
Created By	Shows who has created the expense account
Created On	Shows the date and time in which the project was created

- By clicking the **view** option, the user can view the expense account.

Expense Account Code	Allows the user to view the expense account code
Expense Account Name	Allows the user to view the expense account name
Expense Account Head	Allows the user to view the expense account head

- By clicking the **edit** option, the user can edit the expense account.

Expense Account Code	Allows the user to edit the expense account code
Expense Account Name	Allows the user to edit the expense account name
Expense Account Head	Allows the user to edit the expense account head

- After editing the contents, the user can click **save** option to save the changes.

4.13.6 PRICE SHEET

This module enables the user to view and maintain the price sheet which includes price sheet code, price sheet name, status, etc.

View	Allows the user the view the price sheet
Edit	Allows the user to edit the price sheet
Delete	Allows the user to delete the price sheet
Price Sheet Code	Enter the price sheet code

Price Sheet Name	Enter the price sheet name
Status	Shows the status of the price sheet
Created By	Shows who has created the price sheet
Created On	Shows the date and time in which the project was created
Currency Code	Enter the currency code

- By clicking the **view** option, the user can view the price sheet.

Price Sheet Code	Allows the user to view the price sheet code
Price Sheet Name	Allows the user to view the price sheet name
Currency	Allows the user to view the currency
Designation	Allows the user to view the designation
Grade	Allows the user to view the grade
Rate Per Month	Allows the user to view the rate of amount per month
Search	Allows the user to search which includes rate per hours, rate per month, designation name, designation code

- By clicking the **edit** option, the user can edit the price sheet

Price Sheet Code	Allows the user to edit the price sheet code
Price Sheet Name	Allows the user to edit the price sheet name
Currency	Allows the user to edit the currency from the dropdown list
Designation	Allows the user to edit the designation from the dropdown list
Grade	Allows the user to edit the grade
Rate Per Month	Allows the user to view the rate of amount per month
Search	Allows the user to search which includes rate per hours, rate per month, designation name, designation code

- After editing the contents, the user can click **save** option to save the changes.

4.13.7 DOCUMENT CATEGORY

This module allows the user to view, edit and maintain the category of documents which includes document category, document category name, status, etc.

View	Allows the user the view the document category
Edit	Allows the user to edit the document category
Delete	Allows the user to delete the document category
Document Category Code	Enter the document category code
Document Category Name	Enter the document category name
Status	Shows the status of the document category
Created By	Shows who has created the document category
Created On	Shows the date and time in which the project was created

- By clicking the **view** option, the user can view the document category.

Document Category Code	Allows the user to view the document category code
Document Category Name	Allows the user to view the document category name
Application Module	Allows the user to view the application module

- By clicking the **edit** option, the user can edit the document category.

Document Category Code	Allows the user to edit the document category code
Document Category Name	Allows the user to edit the document category name

Application Module	Allows the user to edit the application module from the drop-down list

- After editing the contents, the user can click **save** option to save the changes.

4.13.8 DOCUMENT FOLDER

This module allows the user to view, edit and maintain the document folder which includes document name, file name, file path, file extension, document meta data.

View	Allows the user the view the document folder
Edit	Allows the user to edit the document folder
Delete	Allows the user to delete the document folder
Document Folder Code	Enter the document folder code
Document Folder Name	Enter the document folder name
Status	Shows the status of the document folder
Created By	Shows who has created the document folder
Created On	Shows when the document folder was created
Document Category Code	Enter the document category code

- By clicking the **view** option, the user can view the document folder.

Document Folder Code	Allows the user to view the document folder code
Document Folder Name	Allows the user to view the document folder name
Document Category	Allows the user to view the document category

- By clicking the **edit** option, the user can edit the document folder.

Document Folder Code	Allows the user to edit the document folder code

Document Folder Name	Allows the user to edit the document folder name
Document Category	Allows the user to edit the document category from the drop-down list

- After editing the contents, the user can click **save** option to save the changes.

4.13.9 AMC TYPE

This module allows the user to view, edit and maintain the AMC type which includes AMC type code, AMC type name, etc.

View	Allows the user the view the AMC type
Edit	Allows the user to edit the AMC type
Delete	Allows the user to delete the AMC type
AMC Type Code	Enter the AMC type code
AMC Type Name	Enter the AMC type name
AMC Type Validity	Enter the AMC type validity
AMC Type Value In	Enter the AMC type value in
Status	Shows the status of the AMC type
Created By	Shows who has created the AMC type
Created On	Shows when the AMC type was created

- By clicking the **view** option, the user can view the AMC type.

AMC Type Code	Allows the user to view the AMC type code
AMC Type Name	Allows the user to view the AMC type name
AMC Type Validity	Allows the user to view the AMC type validity
AMC Type Value In	Allows the user to view the AMC type value in

- By clicking the **edit** option, the user can edit the AMC type.

AMC Type Code	Allows the user to edit the AMC type code
AMC Type Name	Allows the user to edit the AMC type name
AMC Type Validity	Allows the user to edit the AMC type validity
AMC Type Value In	Allows the user to edit the AMC type value in

- After editing the contents, the user can click **save** option to save the changes.

4.13.10 TASK TYPE

This module allows the user to edit and maintain the task type which includes task type code, task type name, etc.

Edit	Allows the user to edit the task type
Delete	Allows the user to delete the task type
Task Type Code	Enter the task type code
Task Type Name	Enter the task type name
Task Type Validity	Enter the task type validity
Task Type Value In	Enter the task type value in
Status	Shows the status of the task type
Created By	Shows who has created the task type
Created On	Shows when the task type was created

- By clicking the **edit** option, the user can edit the task type.

Task Type Code	Allows the user to edit the task type code
Task Type Name	Allows the user to edit the task type name
Task Type Validity	Allows the user to edit the task type validity
Task Type Value In	Allows the user to edit the task type value in

- After editing the contents, the user can click **save** option to save the changes.

4.13.11 PROJECT CHECK LIST PARAMETER

This module allows the user to view, edit and maintain the project check list parameter which includes project check list parameter code, project check list parameter name, etc.

View	Allows the user the view the project check list parameter
Edit	Allows the user to edit the project check list

	parameter
Delete	Allows the user to delete the project check list parameter
Project Check List Parameter Code	Enter the project check list parameter code
Project Check List Parameter Name	Enter the project check list parameter name
Status	Shows the status of the project check list parameter
Created By	Shows who has created the project check list parameter
Created On	Shows when the project check list parameter was created
Project Check List Parameter Code	Enter the project check list parameter code

- By clicking the **view** option, the user can view the project check list parameter.

Project Check List Type	Allows the user to view the project check list type
Project Check List Parameter Code	Allows the user to view the project check list parameter code
Project Check List Parameter Name	Allows the user to view the project check list parameter name
Is New Object	Allows the user to view whether it is new object or not
Project Check List Parameter Line Item Name	Allows the user to view the project check list parameter line item name
Display Order	Allows the user to view the display order
Search	Allows the user to search parameter check list parameter line item name

- By clicking the **edit** option, the user can edit the project check list parameter.

Project Check List Type	Allows the user to edit the project check list type from the drop-down list
Project Check List Parameter Code	Allows the user to edit the project check list parameter code
Project Check List Parameter Name	Allows the user to edit the project check list parameter name
Is New Object	Allows the user to edit whether it is new object or not by selecting yes or no
Project Check List Parameter Line Item Name	Allows the user to edit the project check list parameter line item name
Display Order	Allows the user to edit the display order
Add	Allows the user to add project check list parameter line item name and display order
Search	Allows the user to search parameter check list parameter line item name

- After editing the contents, the user can click **save** option to save the changes.

4.13.12 SECURITY TYPE

This module allows the user to view, edit and maintain the security type which includes security type code, security type name, etc.

View	Allows the user the view the security type
Edit	Allows the user to edit the security type
Delete	Allows the user to delete the security type
Security Type Code	Enter the security type code
Security Type Name	Enter the security type name
Status	Shows the status of security type

Created By	Shows who has created the security type
Created On	Shows when the security type was created

- By clicking the **view** option, the user can view the security type.

Security Type Code	Allows the user to view the security type code
Security Type Name	Allows the user to view the security type name

- By clicking the **edit** option, the user can edit the security type.

Security Type Code	Allows the user to edit the security type code
Security Type Name	Allows the user to edit the security type name

  - After editing the contents, the user can click **save** option to save the changes.

4.13.13 EXPENSE ACCOUNT HEAD

This module allows the user to view, edit and maintain the expense account head which includes expense account head code, expense account head name, etc.

View	Allows the user the view the expense account head
Edit	Allows the user to edit the expense account head
Delete	Allows the user to delete the expense account head
Expense Account Head Code	Enter the expense account head code
Expense Account Head Name	Enter the expense account head name
Status	Shows the status of the expense account head
Created By	Shows who has created the expense account head
Created On	Shows when the expense account head was created

- By clicking the **view** option, the user can view the expense account head.

Expense Account Head Code	Allows the user to view the expense account head code

Expense Account Head Name	Allows the user to view the expense account head name

- By clicking the **edit** option, the user can edit the security type.

Expense Account Head Code	Allows the user to edit the expense account head code
Expense Account Head Name	Allows the user to edit the expense account head name

- After editing the contents, the user can click **save** option to save the changes.

4.14 INVENTORY SETUP

This module, enables the user to maintain the inventory setup which includes the following:

- UOM Conversion Factor
- Currency
- Currency Conversion
- Bin
- Bin Type
- Sub Inventory
- UOM
- Tax

4.14.1 UOM CONVERSION FACTOR

This module allows the user to maintain the UOM conversion factor which includes view, edit, delete, base UOM, status, etc.

Base UOM	Enter the base UOM
UOM To Base UOM Conversion Factor	Enter the UOM to base UOM conversion factor
Item Code	Enter the item code
Item Name	Enter the item name

- By clicking the **view** option, the user can view the UOM conversion factor.

Item	Allows the user to view the item
UOM To Base UOM Conversion Factor	Allows the user to view the UOM to base UOM conversion factor
UOM	Allows the user to view the of the UOM
Base UOM	Allows the user to view the base UOM

- By clicking the **edit** option, the user can edit the UOM conversion factor.

Item	Allows the user to edit the item from drop-down list
UOM To Base UOM Conversion Factor	Allows the user to edit the UOM to base UOM conversion factor
UOM	Allows the user to edit the of the UOM from drop-down list
Base UOM	Allows the user to edit the base UOM from drop-down list

- After editing the contents, the user can click **save** option to save the changes.

4.14.2 CURRENCY

This module allows the user to maintain the currency which includes view, edit, delete, currency code, currency name, status, etc.

Currency Code	Enter the currency code
Currency Name	Enter the currency name
Fills Name	Enter the fills name
ISO Currency Code	Enter the ISO currency code
ISO Currency Symbol	Enter the ISO currency symbol
No Of Decimal Digits	Enter the number of decimal digits
Is Default Currency	Enter whether the currency is default or not

- By clicking the **view** option, the user can view the currency.

Currency Code	Allows the user to view the currency code
Currency Name	Allows the user to view the currency name
Fills Name	Allows the user to view the fills name
ISO Currency Code	Allows the user to view the ISO currency code
ISO Currency Symbol	Allows the user to view the ISO currency symbol
Country	Allows the user to view the country
No Of Decimal Digits	Allows the user to view the number of decimal digits
Is Default Currency	Allows the user to view whether the currency is default or not

- By clicking the **edit** option, the user can edit the currency.

Currency Code	Allows the user to edit the currency code
Currency Name	Allows the user to edit the currency name
Fills Name	Allows the user to edit the fills name
ISO Currency Code	Allows the user to edit the ISO currency code
ISO Currency Symbol	Allows the user to edit the ISO currency symbol
Country	Allows the user to edit the country from drop-down list
No Of Decimal Digits	Allows the user to edit the number of decimal digits
Is Default Currency	Allows the user to edit whether the currency is default or not by selecting yes or no

- After editing the contents, the user can click **save** option to save the changes.

4.14.3 CURRENCY CONVERSION

This module allows the user to maintain the currency conversion which includes view, edit, delete, currency start date, from currency code, status, etc.

Currency Start Date	Enter the currency start date
From Currency Code	Enter the currency code
Currency End Date	Enter the currency end date

To Currency Code	Enter the currency to respective currency code
Conversion Value	Enter the ISO currency value
Status	Shows the status of the currency conversion
Created By	Shows who has created the currency conversion
Created On	Shows when the currency conversion was created

4.14.4 BIN

This module allows the user to maintain the bin which includes view, edit, delete, bin code, status, etc.

Bin Code	Enter the bin code
Created By	Shows who has created the bin
Warehouse Name	Enter the warehouse name
Bin Type Name	Enter the bin type name
Sub Inventory Name	Enter the sub inventory name
Is Default Bin	Shows whether the bin is default or not
Status	Shows the status of the bin

- By clicking the **view** option, the user can view the bin.

Bin Code	Allows the user to view the bin code
Warehouse	Allows the user to view the warehouse
Sub Inventory	Allows the user to view the sub inventory
Bin Type	Allows the user to view the bin type
Is Default Bin	Allows the user to view whether the bin is default or not

- By clicking the **edit** option, the user can edit the bin.

Bin Code	Allows the user to edit the bin code
Warehouse	Allows the user to edit the warehouse from drop-down list
Sub Inventory	Allows the user to edit the sub inventory from drop-down list

Bin Type	Allows the user to edit the bin type from drop-down list
Is Default Bin	Allows the user to edit whether the bin is default or not by selecting yes or no

- After editing the contents, the user can click **save** option to save the changes.

4.14.5 BIN TYPE

This module allows the user to maintain the bin type which includes view, edit, delete, bin type code, bin type name, status, etc.

Bin Type Code	Enter the bin type code
Bin Type Name	Enter the bin type name
No Of Bins Per Warehouse	Enter the number of bins per warehouse
Allow Multiple Items	Ente the allow multiple items

- By clicking the **view** option, the user can view the bin type.

Bin Type Code	Allows the user to view the bin type code
Bin Type Name	Allows the user to view the bin type name
No Of Bins Per Warehouse	Allows the user to view the number of bins per warehouse
Allow Multiple Items	Allows the user to view the allows multiple items

- By clicking the **edit** option, the user can edit the bin type.

Bin Type Code	Allows the user to edit the bin type code
Bin Type Name	Allows the user to edit the bin type name
No Of Bins Per Warehouse	Allows the user to edit the number of bins per warehouse
Allow Multiple Items	Allows the user to edit the allows multiple items by selecting yes or no

- After editing the contents, the user can click save option to **save** the changes.

4.14.6 SUB INVENTORY

This module allows the user to maintain the sub inventory which includes view, edit, delete, sub inventory code, sub inventory name, status, etc.

Sub Inventory Code	Enter the sub inventory code
Sub Inventory Name	Enter the sub inventory name
Status	Shows the status of the sub inventory
Created By	Shows who has created the sub inventory
Created On	Shows when the sub inventory was created

- By clicking the **view** option, the user can view the sub inventory.

Sub Inventory Code	Allows the user to view the sub inventory code
Sub Inventory Name	Allows the user to view the sub inventory name
Warehouse	Allows the user to view the warehouse

- By clicking the **edit** option, the user can edit the sub inventory.

Sub Inventory Code	Allows the user to edit the sub inventory code
Sub Inventory Name	Allows the user to edit the sub inventory name
Warehouse	Allows the user to edit the warehouse from the drop-down list

- After editing the contents, the user can click **save** option to save the changes.

4.14.7 UOM

This module allows the user to maintain the UOM which includes, edit, delete, UOM code, UOM name, status, etc.

UOM Code	Enter the UOM code
UOM Name	Enter the UOM name
Status	Shows the status of the UOM
Created By	Shows who has created the UOM
Created On	Shows when the UOM was created

- By clicking the **view** option, the user can view the UOM.

UOM Code	Allows the user to view the UOM code
UOM Name	Allows the user to view the UOM name

- By clicking the **edit** option, the user can edit the UOM.

UOM Code	Allows the user to edit the UOM code
UOM Name	Allows the user to edit the UOM name

- After editing the contents, the user can click **save** option to save the changes.

4.14.8 TAX

This module allows the user to maintain the tax which includes view, edit, delete, tax code, tax name, status, etc and it helps in the transaction part.

Tax Code	Enter the tax code
Tax Name	Enter the tax name
Is Default	Enter whether the tax is default or not
Percentage	Enter the percentage
Status	Shows the status of the tax
Created By	Shows who has created the tax
Created On	Shows when the tax was created

- By clicking the **view** option, the user can view the tax.

Tax Code	Allows the user to view the tax code
Tax Name	Allows the user to view the tax name
Tax Type	Allows the user to view the tax type
Is Default	Allows the user to view whether the tax is default or not
Percentage	Allows the user to view the percentage

- By clicking the **edit** option, the user can edit the tax.

Tax Code	Allows the user to edit the tax code
Tax Name	Allows the user to edit the tax name

Tax Type	Allows the user to edit the tax type from the drop-down list
Is Default	Allows the user to edit whether the tax is default or not by selecting yes or no
Percentage	Allows the user to edit the percentage

- After editing the contents, the user can click **save** option to save the changes.

4.15 ITEM UOM MAPPING

This module, enables the user to maintain the item UOM mapping which includes, edit, delete, purchase cost, sales cost, status, etc.

Edit	Allows the user to edit the item UOM mapping
Delete	Allows the user to delete the item UOM mapping
Purchase Cost	Enter the purchase cost
Sales Cost	Enter the sales cost
Status	Shows the status of the item UOM mapping
Created By	Shows who has created the item UOM mapping
Created On	Shows when the item UOM mapping was created
Item Code	Enter the item code

- By clicking the **edit** option, the user can edit the item UOM mapping.

Item ID	Allows the user to edit the item ID from the drop-down list
UOMID	Allows the user to edit the UOMID from the drop-down list
Purchase Cost	Allows the user to edit the purchase cost from the drop-down list
Sales Cost	Allows the user to edit the sales cost from the drop-down list

- After editing the contents, the user can click **save** option to save the changes.

4.16 DEPARTMENT

This module, enables the user to maintain the department which includes, edit, view, delete, department code, status, etc.

View	Allows the user the view the department
Edit	Allows the user to edit the department
Delete	Allows the user to delete the department
Department Code	Enter the department code
Status	Shows the status of the department
Created By	Shows who has created the department
Created On	Shows when the department was created

- By clicking the **view** option, the user can view the department.

Department Code	Allows the user to view the department code
Department Name	Allows the user to view the department name
Business Vertical	Allows the user to view the business vertical
Business Units	Allows the user to view the business units
Legal Employer	Allows the user to view the legal employer

- By clicking the **edit** option, the user can edit the department.

Department Code	Allows the user to edit the department code
Department Name	Allows the user to edit the department name
Business Vertical	Allows the user to edit the business vertical
Business Units	Allows the user to edit the business units
Legal Employer	Allows the user to edit the legal employer

- After editing the contents, the user can click **save** option to save the changes.

4.17 CUSTOMER SETUP

This module, enables the user to maintain the customer setup which includes the following:

- Account

- Account Contact
- Account Location
- Address Type
- Address

4.17.1 ACCOUNT

This module enables the user to maintain the account which includes account type code, account code, status, etc.

Account Type Code	Enter the account type code
Account Code	Enter the account code
Account Name	Enter the account name
Trade Name	Enter the trade name
Contact Person	Enter the contact person
Contact Person Mobile	Enter the contact person mobile
Email	Enter the email
Contact Person Email	Enter the contact person email

- By clicking the **view** option, the user can view the account.

Account Code	Allows the user to view the account code
Account Name	Allows the user to view the account name
Account Type	Allows the user to view the account type
Trade Name	Allows the user to view the trade name
Country	Allows the user to view the country
Contact Person	Allows the user to view the contact person
Contact Person Mobile	Allows the user to view the contact person mobile
Email	Allows the user to view the email
Contact Person Email	Allows the user to view the contact person email
Notification Email	Allows the user to view the notification email

TRN No	Allows the user to view the TRN number
Remark	Allows the user to view the remark
Corporate Registration No	Allows the user to view the corporate registration number
Status	Allows the user to view the status of the account
Fax	Allows the user to view the fax

- By clicking the **edit** option, the user can edit the account.

Account Code	Allows the user to edit the account code
Account Name	Allows the user to edit the account name
Account Type	Allows the user to edit the account type from drop-down list
Trade Name	Allows the user to edit the trade name
Country	Allows the user to edit the country from drop-down list
Contact Person	Allows the user to edit the contact person
Contact Person Mobile	Allows the user to edit the contact person mobile
Email	Allows the user to edit the email
Contact Person Email	Allows the user to edit the contact person email
Notification Email	Allows the user to edit the notification email
TRN No	Allows the user to edit the TRN number
Remark	Allows the user to edit the remark
Corporate Registration No	Allows the user to edit the corporate registration number
Status	Allows the user to edit the status of the account from the drop-down list
Fax	Allows the user to edit the fax

- After editing the contents, the user can click **save** option to save the changes.

4.17.2 ACCOUNT CONTACT

This module enables the user to maintain the account contact which includes contact person code, contact person name, status, etc.

Contact Person Code	Enter the contact person code
Contact Person Name	Enter the contact person name
Mobile Number 1	Enter the mobile number 1
Mobile Number 2	Enter the mobile number 2
Is This Primary Contact	Enter the whether the primary contact is required or not
Status	Shows the status of the account contact
Created By	Shows who has created the account contact

- By clicking the **view** option, the user can view the account contact.

Department	Allows the user to view the department
Designation	Allows the user to view the designation
Account	Allows the user to view the account
Contact Person Code	Allows the user to view the contact person code
Contact Person Name	Allows the user to view the contact person name
Mobile Number 1	Allows the user to view the mobile number 1
Mobile Number 2	Allows the user to view the mobile number 2
Is this Primary Contact	Allows the user to view the whether the it is primary contact or not

- By clicking the **edit** option, the user can edit the account contact.

Department	Allows the user to edit the department from the drop-down list
Designation	Allows the user to edit the designation from the drop-down list

Account	Allows the user to edit the account from the drop-down list
Contact Person Code	Allows the user to edit the contact person code
Contact Person Name	Allows the user to edit the contact person name
Mobile Number 1	Allows the user to edit the mobile number 1
Mobile Number 2	Allows the user to edit the mobile number 2
Is this Primary Contact	Allows the user to edit the whether the it is primary contact or not by selecting yes or no

- After editing the contents, the user can click **save** option to save the changes.

4.17.3 ACCOUNT LOCATION

This module enables the user to maintain the account location which includes zone, street, building, etc.

Zone	Enter the zone
Street	Enter the street
Building	Enter the building
Address	Enter the address
Area	Enter the area
Land Mark	Enter the land mark
Latitude	Enter the latitude

- By clicking the **view** option, the user can view the account location.

Account Contact	Allows the user to view the account contact
Account Location Name	Allows the user to view the account location name
Account	Allows the user to view the account
Supervisor	Allows the user to view the supervisor
Zone	Allows the user to view the zone

Street	Allows the user to view the street
Building	Allows the user to view the building
Address	Allows the user to view the address
Area	Allows the user to view the area
Land Mark	Allows the user to view the land mark
Latitude	Allows the user to view the latitude
Longitude	Allows the user to view the longitude
Radius	Allows the user to view the radius
POBOX	Allows the user to view the POBOX

- By clicking the **edit** option, the user can edit the account contact.

Account Contact	Allows the user to edit the account contact from the drop-down list
Account Location Name	Allows the user to edit the account location name
Account	Allows the user to edit the account from the drop-down list
Supervisor	Allows the user to edit the supervisor from the drop-down list
Zone	Allows the user to edit the zone
Street	Allows the user to edit the street
Building	Allows the user to edit the building
Address	Allows the user to edit the address
Area	Allows the user to edit the area
Land Mark	Allows the user to edit the land mark
Latitude	Allows the user to edit the latitude
Longitude	Allows the user to edit the longitude
Radius	Allows the user to edit the radius
POBOX	Allows the user to edit the POBOX

- After editing the contents, the user can click **save** option to save the changes.

4.17.4 ADDRESS TYPE

This module enables the user to maintain the address type which includes address type code, address type name, etc.

Address Type Code	Enter the address type code
Address Type Name	Enter the address type name
Status	Shows the status of the address type
Created By	Shows who has created the address type
Created On	Shows when the address type was created

- By clicking the **view** option, the user can view the address type.

Address Type Code	Allows the user to view the address type code
Address Type Name	Allows the user to view the address type name

- By clicking the **edit** option, the user can edit the address type.

Address Type Code	Allows the user to edit the address type code
Address Type Name	Allows the user to edit the address type name

- After editing the contents, the user can click save option to save the changes.

4.17.4 ADDRESS

This module enables the user to maintain the address which includes contact person name, address 1, address 2, etc.

Contact Person Name	Enter the contact person name
Address 1	Enter the address 1
Address 2	Enter the address 2
Address 3	Enter the address 3
City	Enter the name of the city
State	Enter the state
Mobile Number	Enter the mobile number

- By clicking the **view** option, the user can view the address.

Address Type	Allows the user to view the address type
Contact Person Name	Allows the user to view the contact person name
Address 1	Allows the user to view the address 1
Address 2	Allows the user to view the address 2
Address 3	Allows the user to view the address 3
City	Allows the user to view the city
State	Allows the user to view the state
Country	Allows the user to view the country
Mobile Number	Allows the user to view the mobile number
Phone Number	Allows the user to view the phone number
Fax	Allows the user to view the fax
Email	Allows the user to view the email
Pin Code	Allows the user to view the pin code

- By clicking the **edit** option, the user can edit the address.

Address Type	Allows the user to edit the address type from the drop-down list
Contact Person Name	Allows the user to edit the contact person name
Address 1	Allows the user to edit the address 1
Address 2	Allows the user to edit the address 2
Address 3	Allows the user to edit the address 3
City	Allows the user to edit the city
State	Allows the user to edit the state
Country	Allows the user to edit the country from the drop-down list
Mobile Number	Allows the user to edit the mobile number
Phone Number	Allows the user to edit the phone number
Fax	Allows the user to edit the fax
Email	Allows the user to edit the email

Pin Code	Allows the user to edit the pin code

- After editing the contents, the user can click **save** option to save the changes.

4.18 TEAM

This module, enables the user to maintain the team which includes, view, edit, delete, team code, team name, status, etc.

View	Allows the user the view the team
Edit	Allows the user to edit the team
Delete	Allows the user to delete the team
Team Code	Enter the team code
Team Name	Enter the team-name
Status	Shows the status of the team
Created By	Shows who has created the team
Created On	Shows when the team was created
Department Code	Enter the department code

- By clicking the **view** option, the user can view the team.

Team Name	Allows the user to view the team-name
Department Name	Allows the user to view the department name from the drop-down list
Supervisor	Allows the user to view the supervisor from the drop-down list
Team Leader	Allows the user to view the team leader
Available Employee	Allows the user to view the available employee from the list
Selected Employee	Allows the user to view the selected employee from the list

- By clicking the **edit** option, the user can edit the team.

Team Name	Allows the user to edit the team-name

Department Name	Allows the user to edit the department name from the drop-down list
Supervisor	Allows the user to edit the supervisor from the drop-down list
Team Leader	Allows the user to edit the team leader from the drop-down list
Available Employee	Allows the user to edit the available employee from the list
Selected Employee	Allows the user to edit the selected employee from the list

- After editing the contents, the user can click **save** option to save the changes.

4.19 GRADE

This module, enables the user to maintain the grade which includes, view, edit, delete, grade code, grade name, status, etc.

View	Allows the user the view the grade
Edit	Allows the user to edit the grade
Delete	Allows the user to delete the grade
Grade Code	Enter the grade code
Grade Name	Enter the grade name
Status	Shows the status of the grade
Created By	Shows who has created the grade
Created On	Shows when the grade was created

- By clicking the **view** option, the user can view the grade.

Grade Code	Allows the user to view the grade code
Grade Name	Allows the user to view the grade name

- By clicking the **edit** option, the user can edit the grade.

Grade Code	Allows the user to edit the grade code
Grade Name	Allows the user to edit the grade name

➢ After editing the contents, the user can click **save** option to save the changes.

4.20 OTHER ACTIVITY

This module, enables the user to maintain other activities which includes, view, edit, delete, other activity code, other activity name, status, etc.

View	Allows the user the view the other activity
Edit	Allows the user to edit the other activity
Delete	Allows the user to delete the other activity
Other Activity Code	Enter the other activity code
Other Activity Name	Enter the other activity name
Status	Shows the status of the other activity
Created By	Shows who has created the other activity
Created On	Shows when the other activity was created

➢ By clicking the **view** option, the user can view the grade.

Other Activity Code	Allows the user to view the other activity code
Other Activity Name	Allows the user to view the other activity name

➢ By clicking the **edit** option, the user can edit the grade.

Other Activity Code	Allows the user to edit the other activity code
Other Activity Name	Allows the user to edit the other activity name

➢ After editing the contents, the user can click **save** option to save the changes.

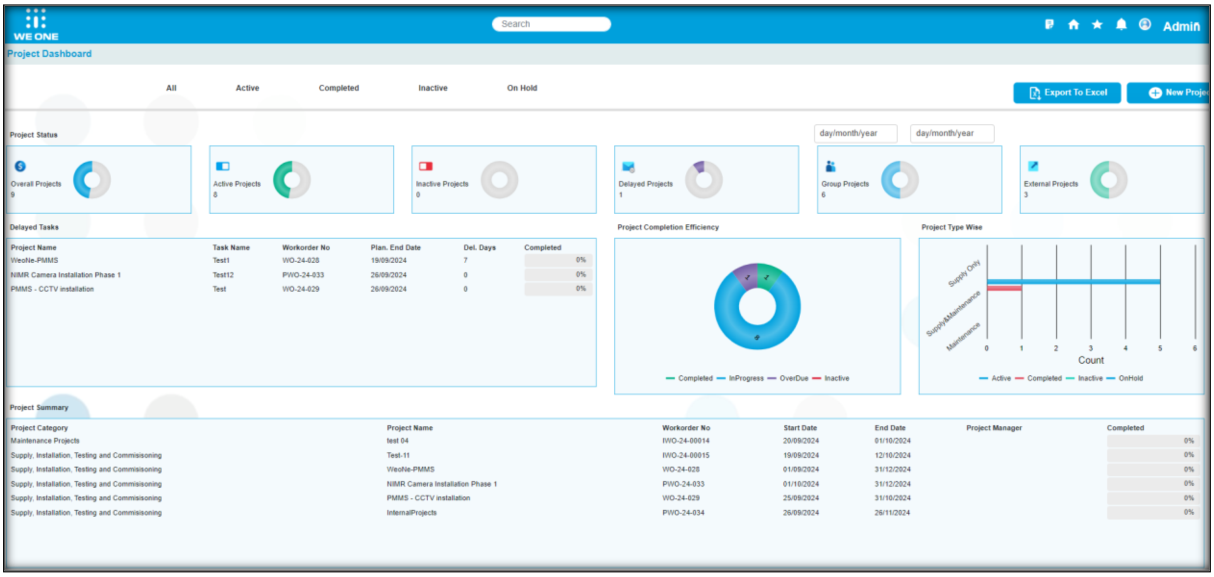
5. PROJECT MODULE

Through this section, user will get a clear understanding on how to create a project, project plan, assigning the resources, create AdHoc tasks and handling other project management related activities.

NAVIGATING TO PROJECT MENU

- Login to the application

- Click on "**Projects**" from the main menu it will redirect the user to the following screen:

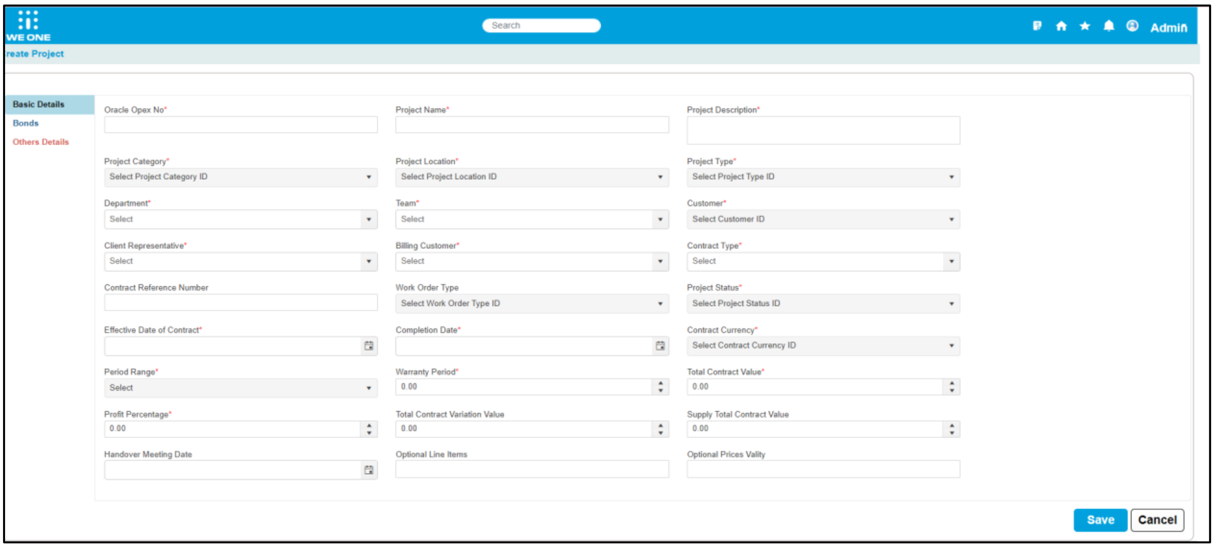


EXPORT TO EXCEL

Using the export to excel, the user can export the project details to an excel sheet from the application.

NEW PROJECT

Clicking on the **New Project** option will direct the user to the following page:



The new project page has certain modules. They are

- Basic Details
- Bonds
- Other Details

BASIC DETAILS

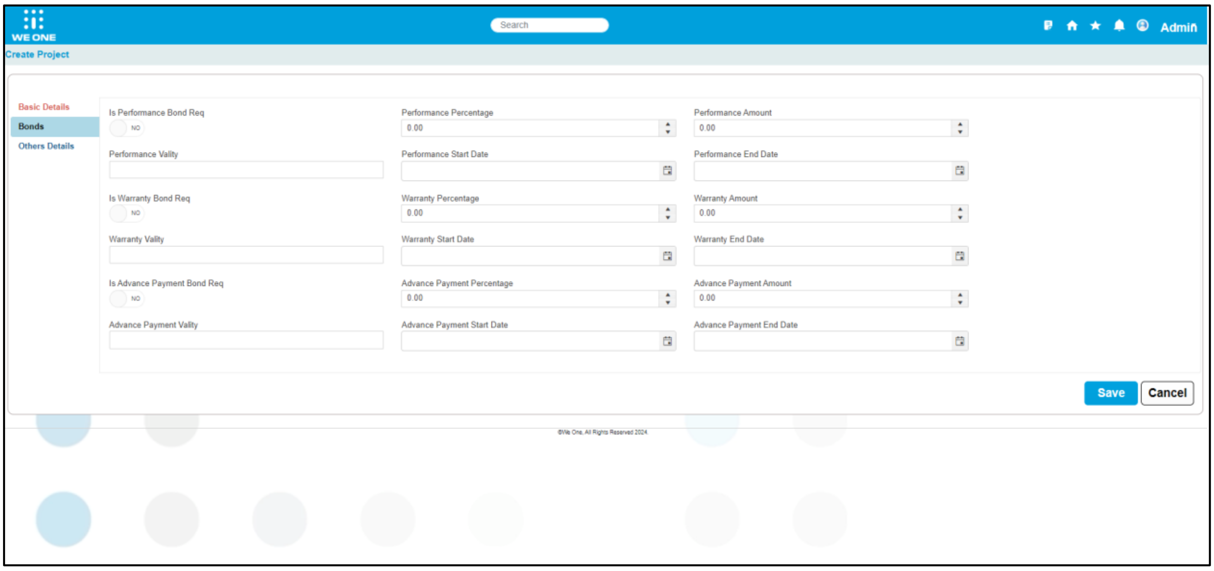
By clicking the basic details, the user can fill the described information

Oracle Opex No	Allows the user to enter the oracle opex number
Project Name	Allows the user to enter the project name
Project Description	Allows the user to enter the project description
Project Category	Allows the user to select the project category from the drop-down list
Project Location	Allows the user to select the project location from the drop-down list
Project Type	Allows the user to select the project type from the drop-down list
Department	Allows the user to select the department from the drop-down list

Team	Allows the user to select the team from the drop-down list
Customer	Allows the user to select the customer ID from the drop-down list
Client Representative	Allows the user to select the client representative from the drop-down list
Billing Customer	Allows the user to select the billing customer from the drop-down list
Contract Type	Allows the user to select the contract type from the drop-down list
Contract Reference Number	Allows the user to enter the contract reference number
Work Order Type	Allows the user to select the work order type from the drop-down list
Project Status	Allows the user to select the project status from the drop-down list
Effective Date of Contract	Allows the user to select the effective date of contract from the calendar button
Completion Date	Allows the user to select the completion date from the calendar button
Contract Currency	Allows the user to select the contract currency from the drop-down list
Period Range	Allows the user to select the period range from the drop-down list
Warranty Period	Allows the user to enter the warranty period
Total Contract Value	Allows the user to enter the total contract value
Profit Percentage	Allows the user to enter the profit percentage
Total Contract Variation Value	Allows the user to enter the total contract variation value
Supply Total	Allows the user to enter the supply total contract

Contract Value	value
Handover Meeting Date	Allows the user to select the handover meeting date from the calendar button
Optional Line Items	Allows the user to enter the optional line items
Optional Prices Vality	Allows the user to enter the optional prices vality

- After entering the above details, the user has to click **Save** button to save the changes. Next the user can move to the next screen by clicking on the **Bonds**. After clicking on the bonds, the following screen will display on the screen.



In this module, the user can save the information about the bonds.

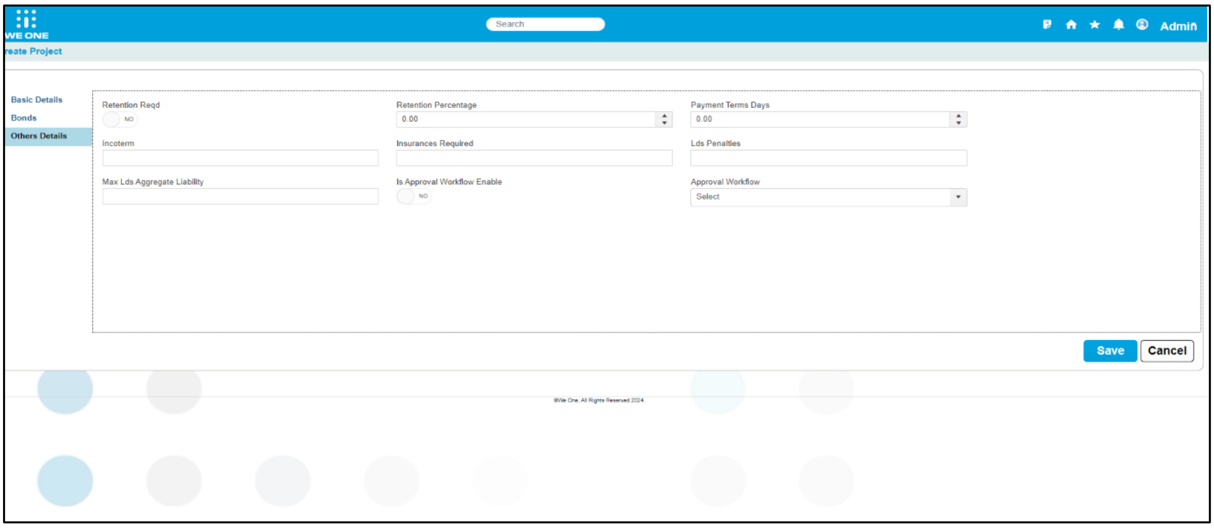
Is Performance Bond Req	Allows the user to select whether the performance bond request needed or not by selecting yes or no
Performance Percentage	Allows the user to enter the performance percentage
Performance Amount	Allows the user to enter the performance amount
Performance Vality	Allows the user to enter the performance vality
Performance Start Date	Allows the user to select the performance start date from the calendar button

Performance End Date	Allows the user to select the performance end date from the calendar button
Is Warranty Bond Req	Allows the user to select whether the warranty bond request is necessary or not by selecting yes or no
Warranty Percentage	Allows the user to enter the warranty percentage
Warranty Amount	Allows the user to enter the warranty amount
Warranty Vality	Allows the user to enter the warranty vality
Warranty Start Date	Allows the user to select the warranty start date from the calendar button
Warranty End Date	Allows the user to select the warranty end date from the calendar button
Is Advance Payment Bond Req	Allows the user to select whether it is advance payment or not by selecting yes or no
Advance Payment Percentage	Allows the user to enter the advance payment
Advance Payment Amount	Allows the user to enter the advance payment amount
Advance Payment Vality	Allows the user to enter the advance payment vality
Advance Payment Start Date	Allows the user to select the advance payment start date from the calendar button
Advance Payment End Date	Allows the user to select the advance payment end date from the calendar button

- After entering all the required information, the user has to click **Save** option to save the changes. Then the user can move to the next module which is other details.

OTHER DETAILS

After clicking on the "**Other Details**" the user will navigate to the following screen:



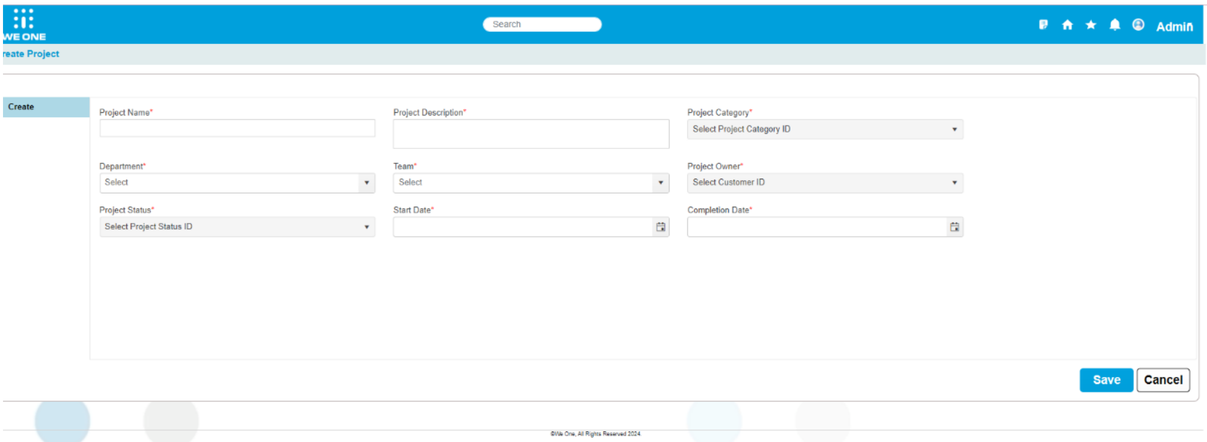
In this module, the user can enter other details which are as follows:

Retention Reqd	Allows the user to select whether the retention request needed or not by selecting yes or no
Retention Percentage	Allows the user to enter the retention percentage
Payment Terms Days	Allows the user to enter the payment terms days
Incoterm	Allows the user to enter the incoterm
Insurances Required	Allows the user to enter the insurances required
Lds Penalties	Allows the user to enter the Lds penalties
Max Lds Aggregate Liability	Allows the user to enter the maximum Lds aggregate liability
Is Approval Workflow Enable	Allows the user to select whether approval workflow is enabled or not by selecting yes or no
Approval Workflow	Allows the user to select the approval workflow from the drop-down list

- After entering all the required information, the user has to click **Save** option to save the changes.

NEW INTERNAL PROJECTS

In this module the user can create new internal projects. Afte clicking the **New Internal Projects**, the user will navigate to the following screen:



The user can click **Create** to create an internal project which entering the following details.

Project Name	Allows the user to enter the project name
Project Description	Allows the user to enter the project description
Project Category	Allows the user to select the project category from the drop-down list
Department	Allows the user to select the department from the drop-down list
Team	Allows the user to select the team from the drop-down list
Project Owner	Allows the user to select the customer ID from the drop-down list
Project Status	Allows the user to select the project status ID from the drop-down list

Start Date	Allows the user to select the start date from the calendar button
Completion Date	Allows the user to select the completion date from the calendar button

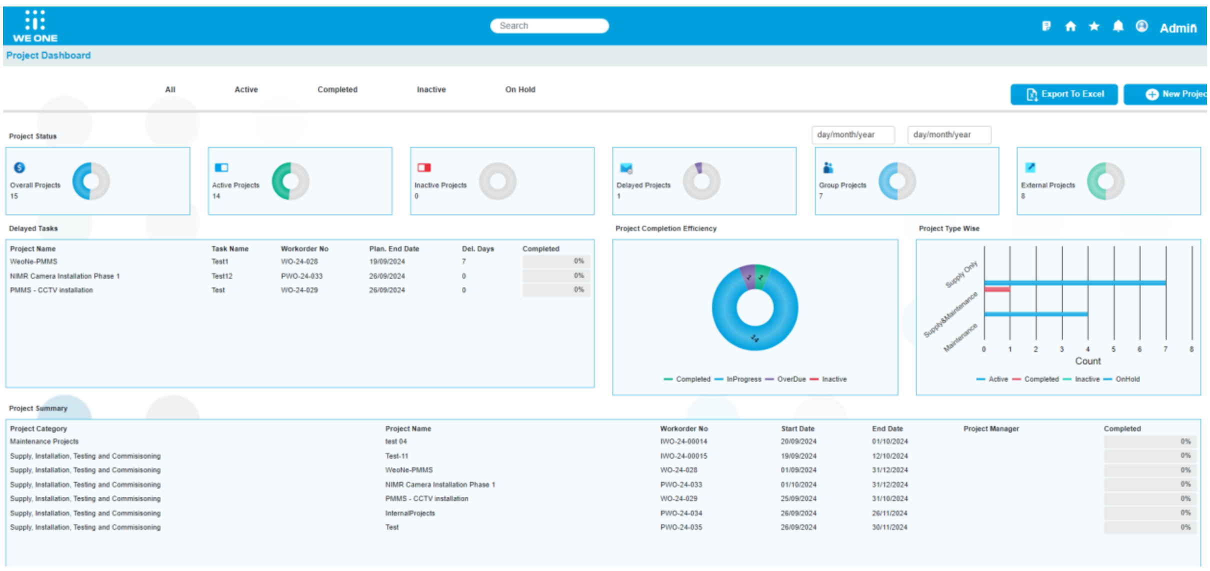
- After entering the required details, the user can click **Save** option to create an internal project.

STATUS OF THE PROJECTS

Once the project is created the user can define the status of the project and it is listed below:

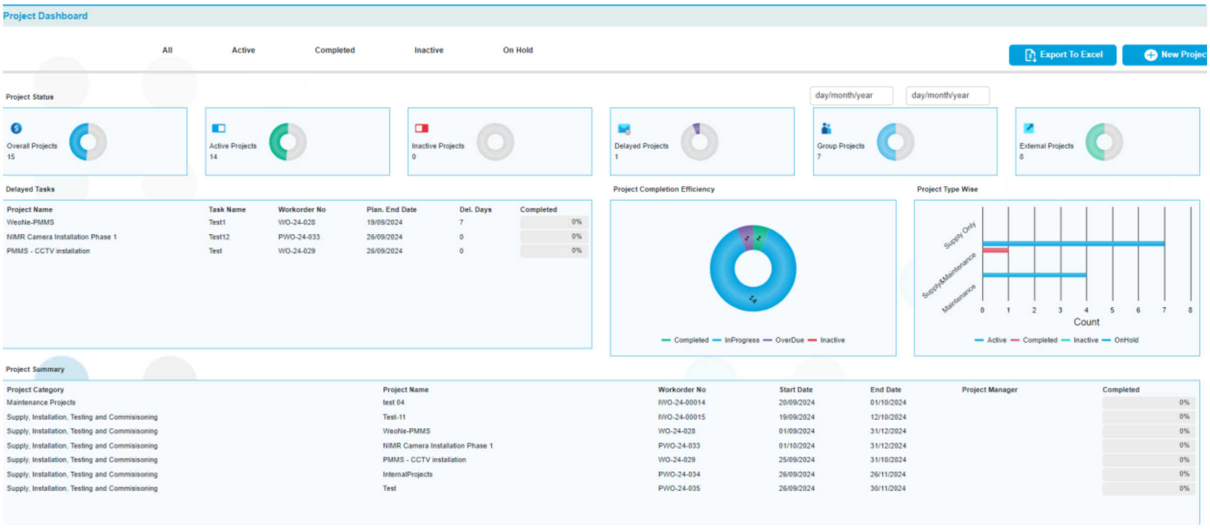
- All
- Active
- Completed
- Inactive
- Onhold

The status of the projects will be display in the screen.



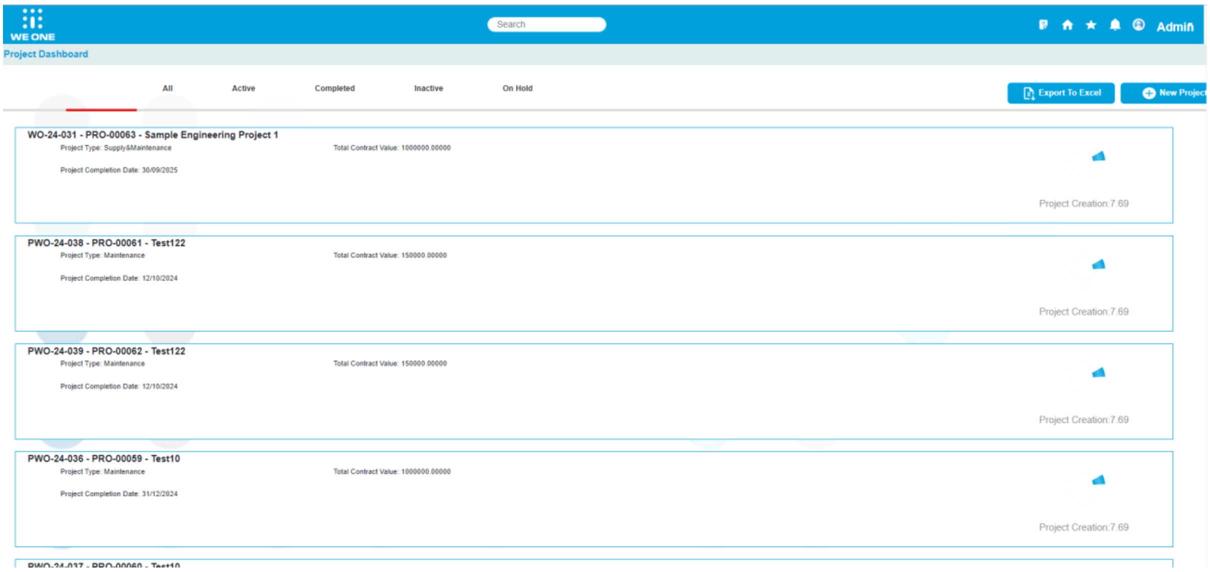
ALL

This screen will show all the created projects in the application



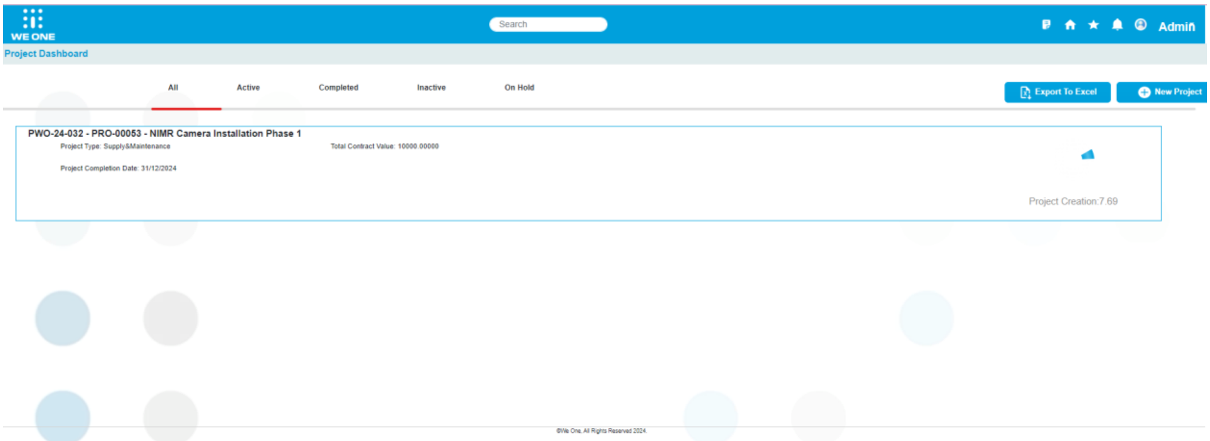
ACTIVE

This screen will show all the active projects



COMPLETED

This screen will show the completed projects



INACTIVE

This screen will show the projects which are inactive

ONHOLD

This screen will show the on-hold projects

6. INVENTORY MODULE

After clicking the inventory module, the user can select the desired warehouse from the drop-down list. After selecting a warehouse, the following modules will be displayed:

- Purchase Order
- GRN with PO
- GRN without PO
- Purchase Return
- Sales Order
- Item Dispatch
- Item Issue
- Sales Return
- Putaway

- Bin To Bin
- Transfer Out
- Transfer In
- Stock Adjustment
- Asset Conversion
- Day Book Entry
- Asset Barcode Printing
- Bin Code Printing
- Item Code Printing

6.1 PURCHASE ORDER

This module, enables the user to maintain purchase order which includes, view, edit, delete, purchase order number, reference number, etc. Purchase Order will be created here. Items will be purchased here.

To create a purchase order the user has to

- Select the purchase order
- According to the selected purchase orders, the amount will be reduced
- Then the user has to select the **Item**
- After selecting the item, the user can enter the quantity either manually or by clicking the increase button. The **UOM** will be automatically displayed in the purchase order, as it was already selected in the master module in the item category.
- Then the user has to enter the **Unit Price**
- By clicking the **Discount Type** and **Discount Value** the user can assign the discount price for each item. **Remarks** can be added.
- After clicking the **Add** icon it will be added in the line items.
- The user can select the **Tax** from the drop-down list. Then the **Total Amount** will be added accordingly.

- After clicking the **Save** it will be saved. The purchase order will be created.

Purchase Order No	Enter the purchase order number
Reference No	Enter the reference number
Purchase Order Date	Enter the purchase order date
Created By	Shows who has created the purchase order
Created On	Shows when the purchase order was created
Supplier	Enter the supplier
Status	Shows the status of the purchase order

- By clicking the **view** option, the user can view the purchase order

Purchase Order No	Allows the user to view the purchase order number
Reference No	Allows the user to view the reference number
Purchase Order Date	Allows the user to view the purchase order date
Account	Allows the user to view the account
Remarks	Allows the user to view the remarks
Project	Allows the user to view the project
Item	Allows the user to view the status of the item from the drop-down list
UOM	Allows the user to view the UOM
Qty	Allows the user to view the quantity
Unit Price	Allows the user to view the unit price
Discount Type	Allows the user to view the discount type from the drop-down list
Discount Value	Allows the user to view the discount value
Remarks	Allows the user to view the remarks
Search	Allows the user to view the item code, item name, quantity, UOM code, unit price, total amount by searching
Discount	Allows the user to view the discount from the drop-

	down list
Enter Discount	Allows the user to view the discount entered
Tax	Allows the user to view the tax from the drop-down list
Total Amount	Allows the user to view the total amount

- By clicking the **edit** option, the user can edit the purchase order

Purchase Order No	Allows the user to edit the purchase order number
Reference No	Allows the user to edit the reference number
Purchase Order Date	Allows the user to edit the purchase order date from the calendar icon
Account	Allows the user to edit the account from the drop-down list
Remarks	Allows the user to edit the remarks
Project	Allows the user to edit the project from the drop-down list
Item	Allows the user to edit the item from the drop-down list
UOM	Allows the user to edit the UOM from the drop-down list
Qty	Allows the user to edit the quantity
Unit Price	Allows the user to edit the unit price
Discount Type	Allows the user to edit the discount type from the drop-down list
Discount Value	Allows the user to edit the discount value
Remarks	Allows the user to edit the remarks
Add	Allows the user to add the items into a line item
Search	Allows the user to edit the item code, item name, quantity, UOM code, unit price, total amount by searching
Discount	Allows the user to edit the discount from the drop-

	down list
Enter Discount	Allows the user to edit the discount entered
Tax	Allows the user to edit the tax from the drop-down list
Total Amount	Allows the user to edit the total amount

- After editing the contents, the user can click **save** option to save the changes.

6.2 GRN WITH PO

This module, enables the user to maintain the GRN with PO which includes, view, edit, delete, GRN number, GRN date, etc.

To create GRN with PO, the user has to

- Select the defined **Purchase Order** from the drop-down list
- In the **Item,** the user can select the pre-defined from the drop-down list
- Then the user can select the **Quantity** and **Unit Price** and give the required items
- By clicking the **Stock,** the user can view the number of items in the warehouse
- Then the user can click, **Add**
- If the given quantity is above then the items in the warehouse, an alert will be displayed on the screen as, "**Quantity given is higher than the pending to process".**
- The user can click the **Serial Number,** and give serail number for the given quantity. And then the user can click **Add.**
- After entering the **Tax,** the total amount will be changed accordingly.
- Then the user can click **Save** to save the items.
- It will be saved in the **Bin Item Stock Details** in the **Report module.**
- By clicking the **Show** option, it will be displayed in the **Receiving Bin.**

GRN No	Enter the GRN number

GRN Date	Enter the GRN date
Created From	Shows from where the GRN was created
Status	Shows the status of the GRN with PO

- By clicking the **view** option, the user can view the GRN with PO

GRN No	Allows the user to view the GRN number
Reference No	Allows the user to view the reference number
GRN Date	Allows the user to view the GRN date
Purchase Order	Allows the user to view the purchase order
Account	Allows the user to view the account
Remarks	Allows the user to view the remarks
Project	Allows the user to view the project
Item	Allows the user to view the item from the drop-down list
UOM	Allows the user to view the UOM
Qty	Allows the user to view the quantity
Unit Price	Allows the user to view the unit price
Discount Type	Allows the user to view the discount type from the drop-down list
Discount Value	Allows the user to view the discount value
Remarks	Allows the user to view the remarks
Search	Allows the user to view the item code, item name, total quantity, pending quantity, quantity, UOM code, unit price, add the serial number, stock by searching
Discount	Allows the user to view the discount
Enter Discount	Allows the user to view the discount entered
Tax	Allows the user to view the tax
Total Amount	Allows the user to view the total amount

- By clicking the **edit** option, the user can edit the GRN with PO

GRN No	Allows the user to edit the GRN number

Reference No	
GRN Date	Allows the user to edit the GRN date from calendar button
Purchase Order	Allows the user to edit the purchase order from drop-down list
Remarks	Allows the user to edit the remarks
Work Order No	Allows the user to edit the work order number from drop-down list
Item	Allows the user to edit the status of the item from drop-down list
Qty	Allows the user to edit the quantity
UOM	Allows the user to edit the UOM from drop-down list
Unit Price	Allows the user to edit the unit price
Discount Type	Allows the user to edit the discount type from drop-down list
Discount Value	Allows the user to edit the discount value
Remarks	Allows the user to edit the remarks
Search	Allows the user to edit the item code, item name, total quantity, pending quantity, quantity, UOM code, unit price, add the serial number, stock by searching
Discount	Allows the user to edit the discount from drop-down list
Enter Discount	Allows the user to edit the discount entered
Tax	Allows the user to edit the tax from drop-down list
Total Amount	Allows the user to edit the total amount

- After editing the contents, the user can click save option to save the changes.

6.2 SALES ORDER

This module, enables the user to maintain sales order which includes, view, edit, delete, sales order number, reference number, etc. Through this module, the user can sell the products.

Sales Order No	Enter the sales order number
Reference No	Enter the reference number
Sales Order Date	Enter the sales order date
Created From	Shows from where the sales order was created
Status	Shows the status of the sales order
Currency Name	Enter the currency name
Customer	Enter the customer

6.3 GRN WITH PO

This module, enables the user to maintain the GRN with PO which includes, view, edit, delete, GRN number, GRN date, etc.

To create GRN with PO, the user has to

- Select the defined **Purchase Order** from the drop-down list
- In the **Item,** the user can select the pre-defined from the drop-down list
- Then the user can select the **Quantity** and **Unit Price** and give the required items
- By clicking the **Stock,** the user can view the number of items in the warehouse
- Then the user can click, **Add**
- If the given quantity is above then the items in the warehouse, an alert will be displayed on the screen as, "**Quantity given is higher than the pending to process".**

- The user can click the **Serial Number,** and give serail number for the given quantity. And then the user can click **Add.**
- After entering the **Tax,** the total amount will be changed accordingly.
- Then the user can click **Save** to save the items.
- It will be saved in the **Bin Item Stock Details** in the **Report module.**
- By clicking the **Show** option, it will be displayed in the **Receiving Bin.**

GRN No	Enter the GRN number
GRN Date	Enter the GRN date
Created From	Shows from where the GRN was created
Status	Shows the status of the GRN with PO

- By clicking the view option, the user can view the GRN with PO

GRN No	Allows the user to view the GRN number
GRN Date	Allows the user to view the GRN date
Purchase Order	Allows the user to view the purchase order
Remarks	Allows the user to view the remarks
Work Order No	Allows the user to view the work order number
Item	Allows the user to view the status of the item
Qty	Allows the user to view the quantity
UOM	Allows the user to view the UOM
Unit Price	Allows the user to view the unit price
Discount Type	Allows the user to view the discount type
Discount Value	Allows the user to view the discount value
Remarks	Allows the user to view the remarks
Search	Allows the user to view the item code, item name, total quantity, pending quantity, quantity, UOM code, unit price, add the serial number, stock by searching
Discount	Allows the user to view the discount
Enter Discount	Allows the user to view the discount entered

Tax	Allows the user to view the tax
Total Amount	Allows the user to view the total amount

- By clicking the edit option, the user can edit the GRN with PO

GRN No	Allows the user to edit the GRN number
GRN Date	Allows the user to edit the GRN date from calendar button
Purchase Order	Allows the user to edit the purchase order from drop-down list
Remarks	Allows the user to edit the remarks
Work Order No	Allows the user to edit the work order number from drop-down list
Item	Allows the user to edit the status of the item from drop-down list
Qty	Allows the user to edit the quantity
UOM	Allows the user to edit the UOM from drop-down list
Unit Price	Allows the user to edit the unit price
Discount Type	Allows the user to edit the discount type from drop-down list
Discount Value	Allows the user to edit the discount value
Remarks	Allows the user to edit the remarks
Search	Allows the user to edit the item code, item name, total quantity, pending quantity, quantity, UOM code, unit price, add the serial number, stock by searching
Discount	Allows the user to edit the discount from drop-down list
Enter Discount	Allows the user to edit the discount entered
Tax	Allows the user to edit the tax from drop-down list
Total Amount	Allows the user to edit the total amount

- After editing the contents, the user can click save option to save the changes.

6.4 ITEM DISPATCH

This module, enables the user to maintain item dispatch which includes, view, edit, delete, dispatch number, dispatch date and time, etc. With the Sales Order, the items will be dispatched.

Dispatch No	Enter the dispatch number
Dispatch Date Time	Enter the dispatch date and time
Created From	Shows from where the item dispatch was created

6.5 GRN WITHOUT PO

This module, enables the user to maintain the GRN without PO which includes, view, edit, delete, GRN number, GRN date, etc.

To create the GRN without PO, the user can

- Select the **Item, Quantity, UOM, Unit Price** from the drop-down list
- After clicking the **Add** button, the items will be added in the line item
- Then the user can add **Tax,** it will be added in the total amount.
- After clicking **Save,** the user can see the reports in the **Bin Item Stock Details** in the **Report module.**

GRN No	Enter the GRN number
Reference No	Enter the reference number
GRN Date	Enter the GRN date
Created From	Shows from where the GRN without PO was created
Status	Shows the status of the GRN without PO
Supplier	Enter the supplier

- By clicking the view option, the user can view the GRN without PO

GRN No	Allows the user to view the GRN number
Reference No	Allows the user to view the reference number
GRN Date	Allows the user to view the GRN date
Supplier	Allows the user to view the supplier
Remarks	Allows the user to view the remarks
Work Order No	Allows the user to view the work order number
Item	Allows the user to view the status of the item
Qty	Allows the user to view the quantity
UOM	Allows the user to view the UOM
Unit Price	Allows the user to view the unit price
Discount Type	Allows the user to view the discount type
Discount Value	Allows the user to view the discount value
Remarks	Allows the user to view the remarks
Search	Allows the user to view the item name, bin code, total quantity, UOM code, unit price, to bin code, discount value, discount amount, amount, add the serial number, stock by searching
Discount	Allows the user to view the discount
Enter Discount	Allows the user to view the discount entered
Tax	Allows the user to view the tax
Total Amount	Allows the user to view the total amount

- By clicking the edit option, the user can edit the GRN without PO

GRN No	Allows the user to edit the GRN number
Reference No	Allows the user to edit the reference number
GRN Date	Allows the user to edit the GRN date
Supplier	Allows the user to edit the supplier
Remarks	Allows the user to edit the remarks
Work Order No	Allows the user to edit the work order number
Item	Allows the user to edit the status of the item
Qty	Allows the user to edit the quantity

UOM	Allows the user to edit the UOM
Unit Price	Allows the user to edit the unit price
Discount Type	Allows the user to edit the discount type
Discount Value	Allows the user to edit the discount value
Remarks	Allows the user to edit the remarks
Search	Allows the user to edit the item name, bin code, total quantity, UOM code, unit price, to bin code, discount value, discount amount, amount, add the serial number, stock by searching
Discount	Allows the user to edit the discount
Enter Discount	Allows the user to edit the discount entered
Tax	Allows the user to edit the tax
Total Amount	Allows the user to edit the total amount

- After editing the contents, the user can click save option to save the changes.

6.6 ITEM ISSUE

This module, enables the user to maintain item dispatch which includes, view, edit, delete, dispatch number, dispatch date and time, etc. In this module, the user can Sell the products, without Sales Order or without any documents.

Issue No	Enter the issue number
Issue Date Time	Enter the issue date and time
Created From	Shows from where the item issue was created

6.7 PUTAWAY

This module, enables the user to maintain the putaway which includes, view, edit, delete, putaway number, from warehouse, to warehouse, etc.

To create a putaway the user can

- Select the **Item, To Bin, Quantity** from the drop-down list
- After clicking the **Add,** the user can add a serial number
- After clicking **Save,** the user can see the reports in the **Bin Item Stock Details** in the **Report module**
- The name of the bin will be changed.

Putaway No	Enter the putaway number
From Warehouse	Enter the from warehouse
To Warehouse	Enter the to warehouse
Putaway Date Time	Enter the putaway date and time
Created From	Shows who has created the putaway

- By clicking the view option, the user can view the putaway

Putaway No	Allows the user to view the putaway number
Putaway Date Time	Allows the user to view the putaway date and time
Remarks	Allows the user to view the remarks
Item	Allows the user to view the item
To Bin	Allows the user to view the to bin
Qty	Allows the user to view the quantity
UOM	Allows the user to view the UOM
Remarks	Allows the user to view the remarks
Search	Allows the user to view the item code, item name, from bin code, add the serial number, by searching

- By clicking the edit option, the user can edit the putaway

Putaway No	Allows the user to edit the putaway number
Putaway Date Time	Allows the user to edit the putaway date and time from calendar button
Remarks	Allows the user to edit the remarks
Item	Allows the user to edit the item from drop-down list
To Bin	Allows the user to edit the to bin from drop-down list
Qty	Allows the user to edit the quantity

UOM	Allows the user to edit the UOM from drop-down list
Remarks	Allows the user to edit the remarks
Search	Allows the user to edit the item code, item name, from bin code, add the serial number, by searching

- After editing the contents, the user can click save option to save the changes.

6.8 BIN TO BIN

This module, enables the user to maintain bin to bin which includes, view, edit, delete, from warehouse, to warehouse, etc. Through this module, the items will be transferred to one bin to another bin.

From Warehouse	Enter the from warehouse
To Warehouse	Enter the to warehouse
Created From	Shows from where the bin to bin was created
Status	Shows the status of the bin to bin

6.9 PURCHASE RETURN

This module, enables the user to maintain the purchase return which includes, view, edit, delete, transaction number, transaction subtype, etc. The user can return the defected products to the seller in this module.

To create Purchase Return, the user can

- Select **GRN, Item** from the drop-down list
- Then the user has to click and select **From Bin**
- Next, the user can select **Quantity, Unit Price. UOM** will display automatically.
- Then the user can click, **Add**
- By clicking the **Serial Number,** the item will be returned to the seller

- After clicking **Save,** the user can see the reports in the **Bin Item Stock Details** in the **Report module.**

Transaction No	Enter the transaction number
Transaction Subtype	Enter the transaction subtype
Reference No	Enter the reference number
Transaction Date Time	Enter the transaction date and time
Created From	Shows who has created the purchase return
Source Document No	Enter the source document number
Is Closed	Enter whether the purchase return is closed or not

- By clicking the view option, the user can view the purchase return

Purchase Return No	Allows the user to view the purchase return number
Purchase Return Date	Allows the user to view the purchase return date
GRN	Allows the user to view the GRN
Remarks	Allows the user to view the remarks
Work Order No	Allows the user to view the work order number
Item	Allows the user to view the item
From Bin	Allows the user to view the from bin
Qty	Allows the user to view the quantity
UOM	Allows the user to view the UOM
Unit Price	Allows the user to view the unit price
Discount Type	Allows the user to view the discount type
Discount Value	Allows the user to view the discount value
Remarks	Allows the user to view the remarks
Search	Allows the user to view the item code, item name, from bin code, add the serial number, stock by searching

Discount	Allows the user to view the discount
Enter Discount	Allows the user to view the discount entered
Tax	Allows the user to view the tax
Total Amount	Allows the user to view the total amount

- By clicking the edit option, the user can edit the purchase return

Purchase Return No	Allows the user to edit the purchase return number
Purchase Return Date	Allows the user to edit the purchase return date from calendar button
GRN	Allows the user to edit the GRN from drop-down list
Remarks	Allows the user to edit the remarks
Work Order No	Allows the user to edit the work order number from drop-down list
Item	Allows the user to edit the item from drop-down list
From Bin	Allows the user to edit the from bin from drop-down list
Qty	Allows the user to edit the quantity
UOM	Allows the user to edit the UOM from drop-down list
Unit Price	Allows the user to edit the unit price
Discount Type	Allows the user to edit the discount type from drop-down list
Discount Value	Allows the user to edit the discount value
Remarks	Allows the user to edit the remarks
Search	Allows the user to edit the item code, item name, from bin code, add the serial number, stock by searching
Discount	Allows the user to edit the discount from drop-down list
Enter Discount	Allows the user to edit the discount entered
Tax	Allows the user to edit the tax from drop-down list
Total Amount	Allows the user to edit the total amount

- After editing the contents, the user can click save option to save the changes.

6.10 SALES RETURN

This module, enables the user to maintain bin to bin which includes, view, edit, delete, transaction number, transaction subtype, etc. In this module, the customer can return the defected items to the seller.

Transaction Number	Enter the transaction number
Transaction Subtype	Enter the transaction subtype
Reference No	Enter the reference number
Transaction Date Time	Enter the transaction date and time
Created From	Shows from where the bin to bin was created
Source Document No	Enter the source document number
Is Closed	Enter whether the bin to bin was closed or not

6.11 ASSET CONVERSION

This module, enables the user to maintain asset conversion which includes, view, edit, delete, transaction number, transaction date, etc. The items will be converted into assets in this module.

Transaction Number	Enter the transaction number
Transaction Date	Enter the transaction date
Reference No	Enter the reference number
Remarks	Enter the remarks
Status	Shows the status of the inventory transaction
Created By	Shows who has created the inventory transaction
Created On	Shows when the inventory transaction was created

6.12 TRANSFER OUT

This module, enables the user to maintain the transfer out which includes, view, edit, delete, transaction number, transaction date, etc. The items will be transferred out in this module.

To create a transfer out, the user can

- Select **Item, From Bin, To Warehouse, Quantity** from the drop-down list
- Then the user can add **Serial Number**
- After clicking the **Save,** the changes will be saved.
- After changing the warehouse, the document will be displayed in the **Transfer In.**

Transaction No	Enter the transaction number
Transaction date	Enter the transaction date
Created From	Shows from where the transfer out was created
Status	Shows the status of the transfer out

- By clicking the view option, the user can view the transfer out

Transfer Out No	Allows the user to view the transfer out number
Transfer Date	Allows the user to view the transfer date
To Warehouse	Allows the user to view the to warehouse
Remarks	Allows the user to view the remarks
Item	Allows the user to view the item
From Bin	Allows the user to view the from bin
Qty	Allows the user to view the quantity
UOM	Allows the user to view the UOM
Remarks	Allows the user to view the remarks
Search	Allows the user to view the item code, item name, bin code, total quantity, add the serial number by

	searching

- By clicking the edit option, the user can edit the transfer out

Transfer Out No	Allows the user to edit the transfer out number
Transfer Date	Allows the user to edit the transfer date from calendar buttom
To Warehouse	Allows the user to edit the to warehouse from drop-down list
Remarks	Allows the user to edit the remarks
Item	Allows the user to edit the item from drop-down list
From Bin	Allows the user to edit the from bin from drop-down list
Qty	Allows the user to edit the quantity
UOM	Allows the user to edit the UOM from drop-down list
Remarks	Allows the user to edit the remarks
Search	Allows the user to edit the item code, item name, bin code, total quantity, add the serial number by searching

- After editing the contents, the user can click save option to save the changes.

6.13 TRANSFER IN

This module, enables the user to maintain the transfer in which includes, view, edit, delete, transaction number, transaction date, etc. The items will be transferred in to the desired warehouse.

To create the transfer in, the user can

- Select **Transfer Out No, Item, Quantity** from the drop-down list
- Then the user can click **add** the desired **Serial Number** by scanning the item

- After clicking **Save,** the user can see the reports in the **Bin Item Stock Details** in the **Report module.**
- The item will be changed from one warehouse to the other warehouse

Transaction No	Enter the transaction number
Transaction date	Enter the transaction date
Created From	Shows from where the transfer in was created
Status	Shows the status of the transfer in

- By clicking the view option, the user can view the transfer in

Transfer In No	Allows the user to view the transfer in number
Transfer Date	Allows the user to view the transfer date
Transfer Out No	Allows the user to view the transfer out number
Remarks	Allows the user to view the remarks
Item	Allows the user to view the item
Qty	Allows the user to view the quantity
UOM	Allows the user to view the UOM
Remarks	Allows the user to view the remarks
Search	Allows the user to view the item code, item name, from bin code, add the serial number by searching

- By clicking the edit option, the user can edit the transfer in

Transfer In No	Allows the user to edit the transfer in number
Transfer Date	Allows the user to edit the transfer date from calendar button
Transfer Out No	Allows the user to edit the transfer out number from drop-down list
Remarks	Allows the user to edit the remarks
Item	Allows the user to edit the item from drop-down list
Qty	Allows the user to edit the quantity
UOM	Allows the user to edit the UOM from drop-down list
Remarks	Allows the user to edit the remarks

Search	Allows the user to edit the item code, item name, from bin code, add the serial number by searching

- After editing the contents, the user can click save option to save the changes.

6.14 STOCK ADJUSTMENT

This module, enables the user to maintain the stock adjustment which includes, view, edit, delete, transaction number, transaction subtype, etc. In this module, the stocks can be adjusted.

To create the stock adjustment, the user can

- Select **Item, Quantity** from the drop-down list
- After clicking the **Add** and **Save** it will be saved
- After clicking **Save,** the user can see the reports in the **Bin Item Stock Details** in the **Report module.**

Transaction No	Enter the transaction number
Transaction Subtype	Enter the transaction subtype
Reference No	Enter the reference number
Transaction Date Time	Enter the transaction date and time
Created From	Shows from where the stock adjustment was created
Source Document No	Enter the source document number
Status	Shows the status of the stock adjustment

- By clicking the view option, the user can view the stock adjustment

Stock Adjustment No	Allows the user to view the stock adjustment number
Stock Adjustment Date	Allows the user to view the stock adjustment date
Remarks	Allows the user to view the remarks

Item	Allows the user to view the item
From Bin	Allows the user to view the from bin
Qty	Allows the user to view the quantity
UOM	Allows the user to view the UOM
Remarks	Allows the user to view the remarks
Search	Allows the user to view the item name, from bin code, quantity, remarks, UOM code by searching

- By clicking the edit option, the user can edit the stock adjustment

Stock Adjustment No	Allows the user to edit the stock adjustment number
Stock Adjustment Date	Allows the user to edit the stock adjustment date from the calendar button
Remarks	Allows the user to edit the remarks
Item	Allows the user to edit the item from drop-down list
From Bin	Allows the user to edit the from bin from drop-down list
Qty	Allows the user to edit the quantity
UOM	Allows the user to edit the UOM from drop-down list
Remarks	Allows the user to edit the remarks
Search	Allows the user to edit the item name, from bin code, quantity, remarks, UOM code by searching

- After editing the contents, the user can click save option to save the changes.

6.15 DAY BOOK ENTRY

This module, enables the user to maintain the day book entry which includes, view, edit, delete, ledger number, transaction type, etc. This module will show the amount transactions by cash or bank transfer.

Ledger No	Enter the ledger number
Transaction Type	Enter the transaction type

Transaction Date	Enter the transaction date
Cheque No	Enter the cheque number
Reference No	Enter the reference number
Remarks	Enter the remarks

- By clicking the view option, the user can view the day book entry

Ledger No	Allows the user to view the ledger number
Transaction Number	Allows the user to view the transfer number
Transaction Type	Allows the user to view the transaction type
Transaction Date	Allows the user to view the transaction date
Payment Type ID	Allows the user to view the payment type ID
Payment Mode ID	Allows the user to view the payment mode ID
Cheque No	Allows the user to view the cheque number
Reference No	Allows the user to view the reference number
Account ID	Allows the user to view the account ID
Remarks	Allows the user to view the remarks
Total Amount	Allows the user to view the total amount
Status	Allows the user to view the status of the day book entry

- By clicking the edit option, the user can edit the day book entry

Ledger No	Allows the user to edit the ledger number
Transaction Number	Allows the user to edit the transfer number
Transaction Type	Allows the user to edit the transaction type
Transaction Date	Allows the user to edit the transaction date from calendar button
Payment Type ID	Allows the user to edit the payment type ID from drop-down list
Payment Mode ID	Allows the user to edit the payment mode ID from drop-down list
Cheque No	Allows the user to edit the cheque number
Reference No	Allows the user to edit the reference number

Account ID	Allows the user to edit the account ID from drop-down list
Remarks	Allows the user to edit the remarks
Total Amount	Allows the user to edit the total amount
Status	Allows the user to edit the status of the day book entry from drop-down list

- After editing the contents, the user can click save option to save the changes.

6.16 ASSET BARCODE PRINTING

This module, enables the user to maintain the barcode printing which includes asset ID, asset code, etc. Asset barcode will be printed in this module.

Asset ID	Enter the asset ID
Asset Code	Enter the asset code
Barcode	Enter the barcode
Barcode 2	Enter the barcode 2
Barcode 3	Enter the barcode 3
Project ID	Enter the project ID
Project Code	Enter the project code

6.17 BIN CODE PRINTING

This module, enables the user to maintain the bin code printing which includes bin code, status, etc. Bin code will be printed in this module.

Bin Code	Enter the bin code
Status	Shows the status of the bin code printing
Created By	Shows who has created the bin code printing

Created On	Shows when the bin code printing was created

6.18 ITEM CODE PRINTING

This module, enables the user to maintain the item code printing which includes item code, item name, etc. Item code will be printed in this module.

Item Code	Enter the item code
Item Name	Enter the item name
Reorder Level Qty	Enter the reorder level quantity
Avg Unit Price	Enter the average unit price
Status	Shows the status of the item code printing
Created By	Shows who has created the item code printing
Created On	Shows when the item code printing was created

7. MAINTENANCE MODULE

This module includes the following

- Employee Geo Location Tracking
- Ticket Booking
- Ticket Allocation
- Ticket Administration
- Quote Submission Request
- Quote Submission

7.1 EMPLOYEE GEO LOCATION TRACKING

In this module, the user can track the location of the employees through the geo location. Through this feature, employees can be lively tracked.

Customer	Allows the user to select the customer from the

	drop-down list
Customer Location	Allows the user to select the customer location from the drop-down list
Radius	Allows the user to select the radius

7.2 TICKET BOOKING

This module allows the user to book the tickets which includes customer, customer contact, customer location, etc. PPM ticket can be created from the **Project Module** ⟶ **AMS.** If any malfunction happens, the tickets can be created here.

Customer	Allows the user to select the customer from the drop-down list
Customer Contact	Allows the user to select the customer contact from the drop-down list
Customer Location	Allows the user to select the customer location from the drop-down list
Category	Allows the user to select the category from the drop-down list
Compliant Type	Allows the user to select the compliant type from the drop-down list
Compliant Description	Allows the user to enter the compliant description
Preferred Date Time	Allows the user to select the date from the calendar option and time from the clock option
Duration (Minutes)	Allows the user to select the duration in minutes
Project	Allows the user to select the project from the drop-down list
Priority	Allows the user to select the priority from the priority

	from the given options
SLA	Allows the user to select the SLA
Team	Allows the user to select the team from the drop-down list
Employees	Allows the user to select the employees from the drop-down list
Documents	Allows the user to select the files and documents from the file manager
Item	Allows the user to enter the item
Barcode	Allows the user to select the barcode from the drop-down list
Quantity	Allows the user to select the quantity from the drop-down list

After clicking on the **Add** option, the items will be added into the line item. By clicking on the **Save** option, the user can create the ticket and save the ticket.

- **Schedule Details** allows the user to view the number of tickets per person.
- **Purchase History Details** allows the user to view the purchase history of certain products.
- **Service History** allows the user to view the history of the tickets served for the location and the project.

7.3 TICKET ALLOCATION

This module allows the view to allocate the tickets for the employees.

➢ By clicking on the **Un Assigned Tickets**, the user can view the rescheduled tickets which are not assigned or allocated to the employees at that time. The user can view the unassigned tickets by searching.

- The user can select the day and month from the **Calendar** option.
- The user can view the allocated tickets to the employees by clicking on the **Show full day** or **Show business hours**.
- The status of the tickets will be visible in different colours for different status like
  - Scheduled
  - Accepted
  - Work In Progress
  - Rescheduled
  - Reopen
  - Work Completed
  - Closed

Through this the user can easily view the status of the tickets allotted to the employees.

7.4 TICKET ADMINISTRATION

This module allows the user to administer the tickets which includes ticket number, complaint particulars, etc.

Ticket Number	Enter the ticket number
Compliant Particulars	Enter the compliant particulars
Duration Of Service	Enter the duration of the service
Tentative Schedule Date Time	Enter the tentative schedule date and time
Tentative Schedule End Date	Enter the tentative scheduled end date
Ticket Status	Enter the ticket status
Created From	Shows from where the ticket administration was created

Is PM	Enter whether it is true or false
Schedule Type	Enter the scheduled type
Compliant Type Name	Enter the compliant type name
Account Name	Enter the account name
Ticket Status ID	Enter the ticket status ID

By clicking on the view option, the user can view the following modules

- Ticket Information
- Ticket Allocation
- Barcode
- Inspection
- Check List
- Ticket History

7.4.1 TICKET INFORMATION

This module allows the user to view and edit the information of the ticket which includes ticket number, customer code, etc.

Ticket Number	Allows the user to view the ticket number
Customer Code	Allows the user to view the customer code
Customer Name	Allows the user to view the customer name
Customer Contact	Allows the user to view the customer contact
Location	Allows the user to view the location of the customer
Project	Allows the user to view the project
Scheduled Start Date & Time	Allows the user to view the scheduled start date and time
Scheduled End Date & Time	Allows the user to view the scheduled end date and time
Duration on Creation	Allows the user to view the duration on creation
Category	Allows the user to view the category

Compliant Type	Allows the user to view the compliant type
Compliant Description	Allows the user to view the compliant description
Priority	Allows the user to view the priority
SLA Days	Allows the user to view the SLA days
Ticket Type	Allows the user to view the ticket type
Created From	Allows the user to view from where the ticket was created
Schedule Type	Allows the user to view the schedule type
Team	Allows the user to view the team
Created By	Allows the user to view who has created the ticket
Created Date & Time	Allows the user to view the created date and time
Ticket Status	Allows the user to view the status of the ticket
Remarks	Allows the user to view the remarks
Comments	Allows the user to view the comments
Documents	Allows the user to view from where the document is uploaded

- By clicking the **edit** option, the user can edit the ticket information

Ticket Number	Allows the user to edit the ticket number
Customer Code	Allows the user to edit the customer code
Customer Name	Allows the user to edit the customer name
Customer Contact	Allows the user to edit the customer contact
Location	Allows the user to edit the location of the customer
Project	Allows the user to edit the project
Scheduled Start Date & Time	Allows the user to edit the scheduled start date and time from the calendar icon
Scheduled End Date & Time	Allows the user to edit the scheduled end date and time from the calendar icon
Duration on Creation	Allows the user to edit the duration on creation
Category	Allows the user to edit the category from the drop-

	down list
Compliant Type	Allows the user to edit the compliant type from the drop-down list
Compliant Description	Allows the user to edit the compliant description
Priority	Allows the user to edit the priority
SLA Days	Allows the user to edit the SLA days
Ticket Type	Allows the user to edit the ticket type
Created From	Allows the user to edit from where the ticket was created
Schedule Type	Allows the user to edit the schedule type
Team	Allows the user to edit the team from the drop-down list
Created By	Allows the user to edit who has created the ticket
Created Date & Time	Allows the user to edit the created date and time from the calendar icon
Ticket Status	Allows the user to edit the status of the ticket from the drop-down list
Remarks	Allows the user to edit the remarks
Comments	Allows the user to edit the comments
Documents	Allows the user to edit from where the document is uploaded

- After making the changes, the user can click **Save** the changes. And then the user can click **Next** to move on to the next module **"Ticket Allocation".**

7.4.2 TICKET ALLOCATION

This module includes the allocated ticket information which includes plan start date and time, etc.

Plan Start Date & Time	Allows the user to view the planned start date and time
Plan End Date & Time	Allows the user to view the planned end date and time
Ticket Process Status	Allows the user to view the status of the processed ticket
Preferred Reschedule Date & Time	Allows the user to view the preferred rescheduled date and time

- After clicking on the **Next** option, the user will move on to the next module **"Barcode".**

7.4.3 BARCODE

This module includes the barcode information of the tickets. Barcodes can be scanned only for the approved tickets.

Compliant Type	Allows the user to view the compliant type
Item	Allows the user to view the item
Barcode	Allows the user to view the barcode
Customer Barcode	Allows the user to view the customer barcode
Asset Code	Allows the user to view the asset code
Ticket Process Status	Allows the user to view the ticket process status

- By clicking the **edit** option, the user can edit the barcode module

Barcode	Allows the user to edit the barcode from the drop-down list
Compliant	Allows the user to edit the compliant from the drop-down list
Item	Allows the user to edit the item

The scanning information can be found in the line items ⟶ **Scan**

Select Barcode	Allows the user to select the barcode from the drop-

	down list
Enter Barcode	Allows the user to enter the barcode
Building	Allows the user to enter the name of the building
Floor	Allows the user to enter the floor number
Room	Allows the user to enter the room number
Item	Allows the user to enter the name of the item

After entering the items, the user can click **Save** option. And then the user can click **Next** to move on to the next module **"Inspection".**

7.4.4 INSPECTION

This module shows the inspection details of the tickets which includes barcode, customer barcode, etc.

Barcode	Allows the user to view the barcode
Customer Barcode	Allows the user to view the customer barcode
Item Name	Allows the user to view the item name
Inspection No	Allows the user to view the inspection number
Inspection Date	Allows the user to view the inspection date
Findings	Allows the user to view the findings
Remarks	Allows the user to view the remarks

- By clicking the **edit** option, the user can edit the barcode module

Barcode	Allows the user to edit the barcode from the drop-down list
Item	Allows the user to edit the item
Inspection	Allows the user to edit the inspection
Remarks	Allows the user to edit the remarks
Spare Parts Code	Allows the user to edit the spare parts code from the drop-down list
Spare Parts Name	Allows the user to edit the spare parts name
UOM	Allows the user to edit the UOM from the drop-down

	list
Quantity	Allows the user to edit the quantity
Is Chargeable	Allows the user to select whether it is chargeable or not

- After making the changes, the user can click **Save** option. Then the user can click **Next** to move on to the next module **"Work Status".**

WORK STATUS

This module includes the work status information of the employees.

Barcode	Allows the user to edit the barcode from the drop-down list
Item	Allows the user to edit the item
Work Status	Allows the user to edit the work status from the drop-down list
Remarks	Allows the user to edit the remarks

- After making the changes, the user can click **Save** option. Then the user can click **Next** to move on to the next module **"Ticket History".**

7.4.5 CHECK LIST

This module shows the checklist of the tickets which includes pool, project end, etc.

Barcode	Allows the user to view the barcode
Customer Barcode	Allows the user to view the customer barcode
Pool	Allows the user to view the pool
Contract Ref No	Allows the user to view the contract reference number
Project End Date	Allows the user to view the project end date
Inspected By	Allows the user to view who has inspected
Review & Verified By	Allows the user to view the review and who has

	verified
Approved By	Allows the user to view who has approved
Created Date Time	Allows the user to view the created date and time
Detail	Allows the user to view the details of the ticket
Print	Allows the user to view whether it should be printed or not

7.4.6 TICKET HISTORY

This module shows the history of the tickets which includes allocation created by, created date and time, etc.

Status	Allows the user to view the status
Allocation Created By	Allows the user to view who has created the ticket
Created Date & Time	Allows the user to view the created date and time
Assigned To	Allows the user to view to whom the ticket was allocated
Started Date & Time	Allows the user to view the start date and time
End Date & Time	Allows the user to view the end date and time
Service Duration (hrs)	Allows the user to view the service duration in hours

7.5 QUOTE SUBMISSION REQUEST

This module allows the user to submit a quote request which includes quote submission request number, quotation number, created quotation file path, etc.

Quote Submission Request Number	Enter the quote submission request number
Quotation Number	Enter the quotation number
Created Quotation File Path	Enter the created quotation file path

Is Customer Approved	Enter the whether the customer approved or not
Status	Shows the status of the quote submission request
Created By	Shows who has created the quote submission request
Created On	Shows when the quote submission request was created
Ticket Number	Enter the ticket number
Sales Person	Enter the sales person

- By clicking the edit option, the user can edit the quote submission request.

Quote Submission Request No	Allows the user to edit the quote submission request number
Ticket	Allows the user to edit the ticket
Sales Person	Allows the user to edit the sales person from the drop-down list
Quotation No	Allows the user to edit the quotation number
Remarks	Allows the user to edit the remarks from the drop-down list
Process Status	Allows the user to edit the process status from the drop-down list
Documents	Allows the select the document from the file manager

7.5 QUOTE SUBMISSION

This module allows the user to submit quote which includes quote submission request number, quotation number, created quotation file path, etc.

Quote Submission	Enter the quote submission request number

Request Number	
Quotation Number	Enter the quotation number
Created Quotation File Path	Enter the created quotation file path
Is Customer Approved	Enter the whether the customer approved or not
Status	Shows the status of the quote submission request
Created By	Shows who has created the quote submission request
Created On	Shows when the quote submission request was created
Ticket Number	Enter the ticket number
Sales Person	Enter the sales person

8. REPORTS MODULE

This module includes the reports of all the modules. It consists of the following:

- Tax View
- Warehouse Based Stock View
- Bin Item Stock Details
- Item Details
- Customer Wise Transaction
- Supplier Transaction Line Item Status View
- Day Book Details
- Audit Log Single Entity Records

8.1 TAX VIEW

This module allows the user to view the tax report. And the report format can be chosen by the user which includes Default, PDF, Excel, Excel without page header/footer.

Report Template	Allows the user to select the report template from the drop-down list
Report Format	Allows the user to select the type of format from the drop-down list
Available Order by Fields	Allows the user to view the available fields in an order

- After selecting, the user can click **Show** option to view the report in the chosen format.

8.2 WAREHOUSE BASED STOCK VIEW

This module allows the user to view the warehouse-based stock. And the report format can be chosen by the user which includes Default, PDF, Excel, Excel without page header/footer.

Report Template	Allows the user to select the report template from the drop-down list
Report Format	Allows the user to select the type of format from the drop-down list
Available Order by Fields	Allows the user to view the available fields in an order

- After selecting, the user can click **Show** option to view the report in the chosen format.

8.3 BIN ITEM STOCK DETAILS

This module allows the user to view the details of the bin item stock. And the report format can be chosen by the user which includes Default, PDF, Excel, Excel without page header/footer.

Bin ID	Allows the user to select the bin ID from the drop-down list
Report Template	Allows the user to select the report template from the drop-down list
Report Format	Allows the user to select the type of format from the drop-down list
Available Order by Fields	Allows the user to view the available fields in an order

- After selecting, the user can click **Show** option to view the report in the chosen format.

8.4 ITEM DETAILS

This module allows the user to view the details of the items. And the report format can be chosen by the user which includes Default, PDF, Excel, Excel without page header/footer.

Category ID	Allows the user to select the category ID from the drop-down list
Item ID	Allows the user to select the item ID from the drop-down list
Report Template	Allows the user to select the report template from the drop-down list
Report Format	Allows the user to select the type of format from the drop-down list
Available Order by Fields	Allows the user to view the available fields in an order

- After selecting, the user can click **Show** option to view the report in the chosen format.

8.5 CUSTOMER WISE TRANSACTION

This module allows the user to view the details of the customer transactions. And the report format can be chosen by the user which includes Default, PDF, Excel, Excel without page header/footer.

Item ID	Allows the user to select the category ID from the drop-down list
Account ID	Allows the user to select the item ID from the drop-down list
Created Date Time	Allows the user to choose the created date from the calendar button
Delivery Date	Allows the user to choose the delivery date from the calendar button
Expiry Date	Allows the user to choose the expiry date from the calendar button
Manufacturer Date	Allows the user to choose the manufacturer date from the calendar button
Report Template	Allows the user to select the report template from the drop-down list
Report Format	Allows the user to select the type of format from the drop-down list
Available Order by Fields	Allows the user to view the available fields in an order

- After selecting, the user can click **Show** option to view the report in the chosen format.

8.6 SUPPLIER TRANSACTION LINE ITEM STATUS VIEW

This module allows the user to view the status of the supplier transaction line item. And the report format can be chosen by the user which includes Default, PDF, Excel, Excel without page header/footer.

Item ID	Allows the user to select the category ID from the

	drop-down list
Account ID	Allows the user to select the item ID from the drop-down list
Created Date Time	Allows the user to choose the created from and to date from the calendar button
Delivery Date	Allows the user to choose the delivery from and to date from the calendar button
Expiry Date	Allows the user to choose the expiry from and to date from the calendar button
Manufacturer Date	Allows the user to choose the manufacturer from and to date from the calendar button
Report Template	Allows the user to select the report template from the drop-down list
Report Format	Allows the user to select the type of format from the drop-down list
Available Order by Fields	Allows the user to view the available fields in an order

- After selecting, the user can click **Show** option to view the report in the chosen format.

8.7 DAY BOOK DETAILS

This module allows the user to view the details of the day book. And the report format can be chosen by the user which includes Default, PDF, Excel, Excel without page header/footer.

From Date	Allows the user to select the from date from the calendar button
To Date	Allows the user to select the to date from the calendar button
Payment Mode ID	Allows the user to choose the mode of payment ID

	from the drop-down list
Payment Type Id	Allows the user to choose the payment type ID from the drop-down list
Report Template	Allows the user to select the report template from the drop-down list
Report Format	Allows the user to select the type of format from the drop-down list
Available Order by Fields	Allows the user to view the available fields in an order

- After selecting, the user can click **Show** option to view the report in the chosen format.

8.8 AUDIT LOG SINGLE ENTITY RECORDS

This module allows the user to view the audit log single entity records. And the report format can be chosen by the user which includes Default, PDF, Excel, Excel without page header/footer.

Report Template	Allows the user to select the report template from the drop-down list
Report Format	Allows the user to select the type of format from the drop-down list
Available Order by Fields	Allows the user to view the available fields in an order

- After selecting, the user can click **Show** option to view the report in the chosen format.

9. TOOLS MODULE

The tools available in this module are as follows:

- Customer Login
- User Master

- Role Master
- User Role
- Role Rights
- User Rights
- Error Log
- Change Password
- Configuration
- Notification Setup
- Report Template Setup
- Dashboard Template Setup
- Language
- Field Type
- Selection Control Query
- Code Configuration
- Column Configurations
- Employee Attendance

9.1 CUSTOMER LOGIN

This module allows the user to view, edit and maintain the customer login information which includes user name, person code, etc.

Username	Enter the username
Person Code	Enter the person code
Person First Name	Enter the person first name
Person Last Name	Enter the person last name
Mobile No	Enter the mobile number
User Type	Enter the user type
Status	Shows the status of the customer login

- By clicking the **view** option, the user can view the customer login

Employee Code	Allows the user to view the employee code

First Name	Allows the user to view the first name
Last Name	Allows the user to view the last name
DOJ	Allows the user to view the date of joining from the calendar button
Mobile No	Allows the user to view the mobile number
WhatsApp Mobile No	Allows the user to view the WhatsApp mobile number
Email ID	Allows the user to view the email ID
Gender	Allows the user to view the gender from the drop-down list
Username	Allows the user to view the username
Password	Allows the user to view the password
Confirm Password	Allows the user to view the confirmed password
Customer	Allows the user to view the customer from the drop-down list
Upload Profile Photo	Allows the user to view the uploaded profile photo
Upload Signature	Allows the user to view the uploaded signature
Status	Allows the user to view the status from the drop-down list

- By clicking the **edit** option, the user can edit the customer login

Employee Code	Allows the user to edit the employee code
First Name	Allows the user to edit the first name
Last Name	Allows the user to edit the last name
DOJ	Allows the user to edit the date of joining from the calendar button
Mobile No	Allows the user to edit the mobile number
WhatsApp Mobile No	Allows the user to edit the WhatsApp mobile number
Email ID	Allows the user to edit the email ID
Gender	Allows the user to edit the gender from the drop-down list

Username	Allows the user to edit the username
Password	Allows the user to edit the password
Confirm Password	Allows the user to edit the confirmed password
Customer	Allows the user to edit the customer from the drop-down list
Upload Profile Photo	Allows the user to upload a profile photo by selecting files from the file manager
Upload Signature	Allows the user to upload signature by selecting file from the file manager
Status	Allows the user to edit the status from the drop-down list

- After editing the contents, the user can click **save** option to save the changes.