ENTERPRISE RESOURCE PLANNING

FOR

POONAM COATINGS

V3

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# System Flow

## System flow : Purchase

**Purchase flow: (when the company is purchasing things from any client ) in this case Poonam Coatings is the the buyer and the client is the supplier**

Step 1:

* RFQ (Request for Quotation) SENT to Multiple Suppliers:
  + The buyer (your company) sends the RFQ to multiple suppliers

Step 2:

* Two steps for Suppliers:

1. Supplier Update of RFQ Details in form :

* Suppliers can update the details of the RFQ, such as delivery date.
* Suppliers have to enter the document number.
* Suppliers cannot delete the products added.
* The details will be reflected in the RFQ summary

1. Supplier Sends Quotation:
   * + Suppliers can submit their quotations.
     + The users who receive the sales quotation will have to manually update.
     + The details entered by the suppliers will be reflected in the RFQ summary.

Step 3:

* Purchase Order (PO) Sent:
  + The buyer selects the best supplier and sends them a Purchase Order.

Step 4:

* Invoice Received:
  + The supplier's invoice can be attached to the corresponding PO.

Step 5:

* Purchase Return:
  + The buyer (Poonam Coatings) can process a purchase return for any damaged goods.

## System flow: Sales

**Sales Flow: In this Poonam Coatings is selling its product so it is the seller and the client will be the buyer**

Step 1:

* SQ (Sales Quotation) sent to a buyer.

Step 2:

* In the sales quotation will have these options:
  + Accept the SQ
  + Reject the SQ
  + Request modification of the SQ

Step 3:

* If the "Request Modification" button is selected:
  + The page will be open up for the users to write their modifications on clicking submit it will be shown in SQ page

Step 4:

* New SQ sent:
  + On request the admin can make changes in the existing SQ by clicking on amend.

Step 5:

* New SQ sent:
  + On request the admin can make changes in the existing SQ by clicking on amend.

Step 6:

* After the user accepts SQ Sales Proforma Invoice sent to the buyer and it can be sent for approval to the another admin/user.

Step 7:

* Sales Return:
  + If the buyer needs to return the purchased goods (due to damage, etc.):
  + The buyer initiates the sales return process.
  + The buyer provides details about the items to be returned.
  + The buyer is issued a refund, as per the agreed terms.

# Purchase Module

In the purchase module, there will be 2 pages

1st Quotation page to create an RFQ

2nd Purchase landing page (consisting of (PO document) and other details in a tabular form along with PR (Purchase Return) tab

### Quotation

The Quotations tab is a dedicated section that allows users to create and view all the, Requests for Quotation (RFQs) .

**When RFQ s are created:**

* + When the quantity of an item drops below the minimum stock level quantity, an alert will be sent to the client.
  + When an order is received, and the order quantity exceeds the available inventory quantity for that item, alert will be automatically generated for the gap quantity (the difference between the order quantity and the inventory quantity).

The table view:

* + - Checkbox
      * This field allows users to select or deselect individual rows in the table.
      * It can be useful for bulk actions, such as making Purchase order for the particular products together
    - SKU
      * The "Sku" (Stock Keeping Unit) field represents the unique identifier for each product.
    - Product Name
      * This field displays the name of the product.
    - Refill Quantity
      * This field likely represents the quantity or amount that have to be refilled for the corresponding product.

When you click on the checkbox you will have a button on the top Create PO. So you can select set of products and create PO for the same. When you click on Create Po you will get a pop-up for selecting particular company. After selecting company user will be redirected to the Purchase order form page.

Note: The alert will also be shown whenever there is quantity drop below minimum stock level or new product is ordered.

## RFQ

There will be a button “Create RFQ” , RFQ you will be redirected/ pop up to the new page which will consist of the details that has to be filled :

* **Buyer Details**
* This section will contain fields for the buyer's information, such as their name, contact details.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of billing addresses below search bar.
* You can search the particular billing address and select from the list or add new billing address
* Add new billing address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
* Delivery Location
  + This field will allow the buyer to specify the location where the requested products or services need to be delivered.

* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of delivery address below search bar.
* You can search the particular delivery address and select from the list or add new billing address
* Add new delivery address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.

**Primary Document Details:**

* Document Number [Text-field] \*:

A unique identifier for the RFQ document will be assigned. Customisable.

* Document Date [Date Picker] \*:

The date on which the RFQ is being created. Auto-filled not customisable

* Delivery Date [Date Picker] \*:

The date by which the buyer expects the requested items to be delivered.

* Bidding Start Date [Date Picker] \*:

The date from which suppliers can start submitting their bids.

* Bidding End Date [Date Picker] \*:

The date by which suppliers must submit their bids.

* Payment Term[dropdown]:

The "Payment Term" in a contract or business transaction refers to the agreed-upon conditions and timelines for when payments are to be made. Some common payment terms include:

Example:

* + Net 30: Payment is due within 30 days of the invoice date.
  + Prepaid: Payment is required before the goods or services are provided.
  + COD (Cash on Delivery): Payment is required at the time of delivery.
  + Progress Payments: Partial payments are made as work is completed.
  + Net 60: Payment is due within 60 days of the invoice date.

**Suppliers:**

* Company Name[dropdown] \*:

A dropdown list of the available supplier companies that the buyer can select from.

* Company Email Id[Text-field]:

It will be auto fetched, there will be edit option by which you can manually enter the email id.

* Add Supplier button

Will add another row

Note: There will be add new company button and edit button at the top in Suppliers. Add new Company button will open up the pop-up which was opened when entering new company.

**Product Description:**

* SKU[Text field with search option] \*:

The Stock Keeping Unit or unique identifier for the product.

* Product Name [Text field with search option] \*:

The name of the product being requested.

* HSN/SAC code [Text-field]
* Product Code
* Quantity [Text field] \*

The number of units of the product required.

* Pack size[dropdown] and UOM[dropdown] \*
* Delivery Date [Date picker] \*:

The date by which the buyer expects the product to be delivered.

* Additional Detail:

This field provides an area for the buyer to add any other information or instructions that they want to convey to the suppliers.

* Add Item

A button that allows the buyer to add more products to the RFQ.

Note: When you select SKU or Product Name product details will be auto fetched automatically.

**Cancel Button**

**Save Draft:**

This button allows the buyer to save the RFQ as a draft, without sending it to the suppliers.

**Preview:**

This button gives a chance to user to preview the file.

**RFQ Details Page:**

After clicking the Save and Send button, you will be directed to a page displaying the structured information from the RFQ. It will have RFQ info which was entered like buyer and delivery details, RFQ details like RFQ number, Bidding start date, Delivery date, and creation date. A table of products below it will be displayed. **It will have a download button on the top and close bidding button on top which will close the bidding** and which will download the template in pdf format.

It will also contain button like Save and Send which will Send the RFQ to multiple suppliers.

The page will also include an RFQ summary with rows corresponding to the recipient companies, and the first column will list the products mentioned along with other details.

**RFQ Summary:**

The first row will be of the products requested and other details.

* Description**:**
* SKU number
* Product Name
* Requested Quantity
* Pack Size and UOM
* Additional Charges
* Total Before Tax
* Total Tax
* Grand Total
* Advance to pay
* Payment Terms

**Other Rows:**

* Name of company

Other Rows will contain name of the company.

* Product Info

Each product will contain details like:

* + Quoted Quantity
  + Price
  + Amount
  + Comment
* Additional Charges
* Total Before Tax
* Total Tax
* Grand Total
* Advance to pay
* Payment Terms
* **Punch Quotation button**
  + Manually updating the details

For each company you can edit the details manually by clicking on the edit button. When you click on Punch Quotation button you will be redirected to purchase order page with all the details filled.

* Automate Process:

When the mail is sent to multiple suppliers, they will get a button of punch quotation to reply to the quotation. On clicking punch quotation button the user will be redirected to a new page of Supplier quotation page where user will be able to fill in the form.

* + User can edit the supplier details.
  + User will have to enter the document number, can change the delivery date, can enter the amount in product details, can enter the delivery date for specific product, also if any extra charges, attachments, additional details.

**The Page of Quotations will display when document type RFQ is selected:**

Filters:

* Creation Status [Dropdown]
  + Sent
  + Draft
* Bidding Status [Dropdown]
  + All
  + Open for Bidding
  + Closed for Bidding

**The table view will contain the fields like:**

Search option below every head and sorting icon beside every head which will be sorted on the basis of creation date.

* RFQ Number (Arrow Button)

On clicking view button, user will be redirected to a RFQ details page.

* Supplier Sent (View Button)

Number will be displayed of suppliers sent and when you click on view button a pop-up will open listing all the suppliers which were entered during sending the RFQ.

* Bids Received
* Delivery Date
* Bidding Status
  + Open
  + Closed
* Close Date
* Created on
* Created By

### Purchase Details

#### Purchase Order

A Purchase Order (PO) is a commercial document issued by a buyer to a seller, indicating the specific products or services the buyer intends to purchase, along with agreed-upon terms and conditions. The PO serves as a legally binding contract between the two parties, outlining the quantity, price, delivery date, and other relevant details. It provides clarity and documentation for the procurement process, helping both the buyer and seller to fulfil their respective obligations in a transparent and organized manner.

Purchase Module Landing page will have a button to **create a PO**

When you select on Create Purchase Order it will have a pop-up for Adding/Selecting Supplier.

You can add new Company by clicking on Add Company Button. It will open up a form which was opened when adding a single company in Buyers/Suppliers module.

You will be redirected to the Purchase Order Page. It will have the following details:

Note: You can also directly enter the company name if the company already exists in the database and proceed.

The PO will have the following details to be filled in a form format

* **Buyer Details**
* Contains information about the buyer, including their name, address and any additional relevant information.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of billing address below search bar.
* You can search the particular billing address and select from the list or add new billing address
* Add new billing address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
* **Delivery Location**
* This section will contain fields for the buyer's information, such as their name, contact details.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of delivery address below search bar.
* You can search the particular billing address and select from the list or add new delivery address
* Add new delivery address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

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Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
  + **Supplier Details**
* Provides information about the supplier or vendor from whom the purchase is being made, including their name, address, and any other pertinent details.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of supplier address below search bar.
* You can search the particular supplier address and select from the list or add new billing address
* Add new billing address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

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Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
* **Primary Document Details**

This section includes key details related to the primary transaction document, which is the Purchase Order.

* Title(Transaction) [Text-field] \*:

Specifies the type or title of the transaction, which, in this case, is a Purchase Order.

* Document Number[Text-field] \*
* Document Date

Represents the date when the Purchase Order is issued. Auto filled, non-customisable.

* Payment Term[dropdown]

The "Payment Term" in a contract or business transaction refers to the agreed-upon conditions and timelines for when payments are to be made. Some common payment terms include:

Example:

* + - Net 30: Payment is due within 30 days of the invoice date.
    - Prepaid: Payment is required before the goods or services are provided.
    - COD (Cash on Delivery): Payment is required at the time of delivery.
    - Progress Payments: Partial payments are made as work is completed.
    - Net 60: Payment is due within 60 days of the invoice date.
* Additional Details[Text area]

Additional details related to product

* **Product Details:**

You will be provided with a template that allows you to include the items for the Invoice. It will include the following fields and elements for display.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| SKU \* | Product Name \* | HSN/SAC Code | Quantity \* | Pack size and UoM \* | Price | Delivery Date | Total before tax | Total Tax | Amount | Additional  Detail |
| RM01 |  | 010101010 | 220 | 20 ltr |  |  | 0.25 |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |

The following fields will be displayed which need to be filled in:

* SKU[Text-field with search option]

Select from a dropdown menu containing item identification options. When you select SKU it will automatically fill in the rest of the details like product name, HSN and Price which you can edit.

* Product Name[Text-field with search option]

Select an product name from the dropdown list or by typing the name.

* Product Code
* HSN/SAC Code[Text Field]

Enter the Harmonized System of Nomenclature (HSN) or Service Accounting Code (SAC) associated with the item.

* Quantity[Text Field]

Specify the quantity of the item being ordered.

* Pack size AND UOM [Dropdown]

Select the units of measurement and pack size from a dropdown menu.

* Price[Text Field]

The initial price is pre-filled. You have the option to modify the price as needed, and you can reset it to the default price using the adjacent icon.

* Delivery Date:

Specifies the estimated delivery date.

* Tax[Dropdown]

Select the tax rate from a dropdown menu.

* Total Before Tax[Text Field]

Auto-filled when you select tax.

* Total Amount

Amount auto fetched inclusive of tax and total price.

* Additional Detail[Text Field]

Include any additional comments or notes related to the items.

* **Add Item[Button]**

Click this button to add more items in the order.

* Additional Details

You will have the following additional buttons:

* Extra Charges

When you click on Extra charges it will show the following fields:

* Extra Charge Description[Text Field]

Enter a description for the extra charge.

* Total[Text Field]

Specify the total amount for the extra charge.

* Tax[Dropdown]

Select the tax rate for the extra charge.

* Total Tax[Text Field]

View the total tax amount for the extra charge.

* Comment:

A text field where you can add general comments or notes.

The Order Total will be shown like this:

* Total (before tax):

The cumulative cost of all items before applying taxes.

* Total Tax (IGST) :

The total Integrated Goods and Services Tax (IGST) applied.

* Total (after tax) :

The overall cost of the order after incorporating taxes.

* Non-Taxable Extra Charges[Dropdown]

It will have following fields:

* Add/Less[Dropdown]

Allows you to specify whether the extra charge is an addition or deduction.

* Description[Text Field]

Enter a description for the non-taxable extra charge.

* Amount[Text-Field]

Specify the numerical value or amount associated with the extra charge.

* Percentage/Rupees[Dropdown]

Choose between percentages or rupees to determine how the extra charge is calculated or represented.

* Grand Total :

It will display the total cost of order.

* Advance To Pay :

Indicates any advance payment required for the order.

* Cancel[Button]
* Preview[Button]
* Save Draft[Button]

After click on save button user will be redirected to Purchase order template where all the details will be presented in a structured manner. **There will be a button of Edit, Download Template, Save and send button on top.** When you click on edit button you will be redirected to Purchase order form. Save and send button to share the purchase order template to particular company. If the all the products are delivered there will be a **button of Purchase Return** at the end.

* Send for Approval [Button]

When this button is clicked a pop-up will open up of the list of users, you can send the document for approval to the specific person.

Below the button to create a PO, you will find a detailed table of data of all the PO created the table will be consisting the following details

* PO number ( Eg: PO-007845) {view button: On clicking which the purchase order template will open up }
* Purchase return no.( Arrow button: On clicking which the purchase return template will open up)
* Transaction Title
* Company name ( Xyz consultancy ) {view button }
* Good Status ( Received, Partially Received, Not received )
* Creation date (23/05/2024, 12:40 pm)
* Approval status

All the above fields will have a search bar on the top where the data can be searched manually

#### Purchase Return

When you select on **Purchase Return** it will have a pop-up for Adding/Selecting Supplier.

You can add new Company by clicking on Add Company Button. It will open up a form which was opened when adding a single company in Buyers/Suppliers module.

You will be redirected to the Purchase Return Page. It will have the following details:

Note: You can also directly enter the company name if the company already exists in the database and proceed.

* Goods Received by
* Contains information about the buyer, including their name, address and any additional relevant information.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of billing address below search bar.
* You can search the particular billing address and select from the list or add new billing address
* Add new billing address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
* **Delivery Location**
* This section will contain fields for the buyer's information, such as their name, contact details.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of delivery address below search bar.
* You can search the particular billing address and select from the list or add new delivery address
* Add new delivery address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
  + **Goods Sent By**
* Provides information about the supplier or vendor from whom the purchase is being made, including their name, address, and any other pertinent details.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of supplier address below search bar.
* You can search the particular supplier address and select from the list or add new billing address
* Add new billing address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
* **Delivery Location for purchase return:**

This field will be blank at first you can enter the delivery location for purchase return by clicking on edit beside it.

* **Primary Document Details**

This section includes key details related to the primary transaction document, which is the Purchase Return.

* Purchase Return Number[Text-field] \*
* Document Date

Represents the date when the Purchase return is issued. Auto filled, non-customisable.

* Return Delivery Date[date picker] \*
* PO number[Text-field] \*

* PO date[Text-field] \*
* Invoice number[Text-field]
* Invoice Date[Text-field]
* **Product Details:**

You will be provided with a template that allows you to include the items for the purchase return. It will include the following fields and elements for display.

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| SKU \* | Product Name \* | HSN/SAC | Pack size and UoM \* | Pack | Qty | Price | Delivery Date | Delivered | Purchase return qty | Amount | Additional  Detail | Actions Tab |
| RM01 |  |  | 20 ltr |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |

**The following fields will be displayed which will be auto filled when you write the PO number except purchase return qty:**

* SKU
* Product Name
* Product Code
* HSN/SAC
* Pack size AND UOM
* Delivery Date
* Pack
* Quantity
* Delivered Products
* Purchase return qty**(editable)**
* Purchase Return Amount(Auto fetched)
* Additional Detail
* Actions Tab
* **Add Item[Button]**

Click this button to add more items in the order.

* Additional Details

You will have the following additional buttons:

* Attachments [Max 6 files \* 5 MB]

Allows you to attach files or documents related to the Sales Quotation.

* Comment:

A text field where you can add general comments or notes.

* Cancel [Button]
* Send For Approval [Button]

When this button is clicked a pop-up will open up of the list of users, you can send the document for approval to the specific person or you can send the document to all the users by clicking select all button on top.

* Preview[Button]

A template with all the details will be sent to the particular company along with **two buttons Accept and Reject**. If the user does not click on button we can manually enter it in our system. It will also contain

* Send For Approval [Button]

When this button is clicked a pop-up will open up of the list of users, you can send the document for approval to the specific person or you can send the document to all the users by clicking select all button on top.

* Save and Send[Button]

Clicking the "Save" button typically commits the entered information and officially saves the purchase order data and sends it to the particular company.

**Table View:**

* Purchase Return No (View Button)
* PO number
* Company
* Creation Date
* No. of items
* Approval status(Sent by Supplier)
* Internal Approval Status
* Purchase return Qty(View button)
  + When view button is clicked the user will be redirected to a new pop-up will open up the table of original purchase order product details and the purchase return table below it.
* Delivery Date

# Sales

##### Quotation

##### Sales Quotation

A sales quotation is a document provided by a seller to a potential buyer, offering detailed information about the cost, terms, and conditions of products or services. It outlines the pricing, specifications, and other relevant details, serving as a formal offer to the buyer. The sales quotation helps the buyer make informed decisions and acts as a precursor to the creation of a formal sales agreement or contract.

When you select on **Create Quotation** on the top SQ it will have a pop-up for Adding/Selecting Buyer.

You can select a company from dropdown or add a new Company by clicking on the Add Company Button on top of button. It will have the following details that need to be filled in:

* + The form will open up for adding a company which was opened up for adding single company in the module Buyers and Supplier.
  + If you select the company from the dropdown, you will be redirected to the Sales Quotation Page. It will have the following details:
* **Buyer Details**
* This section will contain fields for the buyer's information, such as their name, contact details.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of billing address below search bar.
* You can search the particular billing address and select from the list or add new billing address
* Add new billing address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
* Delivery Location
* This section will contain fields for the buyer's information, such as their name, contact details.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of delivery address below search bar.
* You can search the particular billing address and select from the list or add new delivery address
* Add new delivery address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
  + Supplier Details
* Provides information about the supplier or vendor from whom the purchase is being made, including their name, address, and any other pertinent details.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of supplier address below search bar.
* You can search the particular supplier address and select from the list or add new billing address
* Add new billing address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
* **Primary Document Details**

This section includes key details related to the primary transaction document, which is the Sales Quotation

* Sales Quotation Number(Customisable)[Text-field]

A unique identifier assigned to the Invoice. This number can be customized for ease of reference and tracking.

* Document Date

Indicates the date when the Invoice document is issued or created. It helps establish a timeline for the transaction. It is fetched by default and is not customisable.

* Delivery Date[Date picker]

Specifies the anticipated or agreed-upon date for the delivery of products or services mentioned in the Sales Quotation.

* Payment Term[dropdown]

The "Payment Term" in a contract or business transaction refers to the agreed-upon conditions and timelines for when payments are to be made. Some common payment terms include:

Example:

* + - Net 30: Payment is due within 30 days of the invoice date.
    - Prepaid: Payment is required before the goods or services are provided.
    - COD (Cash on Delivery): Payment is required at the time of delivery.
    - Progress Payments: Partial payments are made as work is completed.
    - Net 60: Payment is due within 60 days of the invoice date.
* **Product Details:**

You will be provided with a template that allows you to include the items for the Invoice. It will include the following fields and elements for display.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| SKU \* | Product Name \* | HSN/SAC Code | Pack size and UoM \* | pack | Qty | Delivery Date | Totalbefore tax | Tax | Total Amount | Additional  Detail |
| RM01 |  | 010101010 | 20 ltr |  |  |  | 0.25 |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |

The following fields will be displayed which need to be filled in:

* SKU[Text-field with search option]

Select from a dropdown menu containing item identification options. When you select SKU it will automatically fill in the rest of the details like product name, HSN and Price which you can edit.

* Product Name[Text-field with search option]

Select an product name from the dropdown list or by typing the name.

* HSN/SAC Code[Text Field]

Enter the Harmonized System of Nomenclature (HSN) or Service Accounting Code (SAC) associated with the item.

* Quantity[Text Field]

Specify the quantity of the item being ordered.

* Pack size AND UOM [Dropdown]

Select the units of measurement and pack size from a dropdown menu.

* Total Before Tax[Text Field]

The initial price is pre-filled. You have the option to modify the price as needed, and you can reset it to the default price using the adjacent icon.

* Pack
* Quantity
* Price
* Delivery Date:

Specifies the estimated delivery date.

* Total before Tax[Dropdown]

Select the tax rate from a dropdown menu.

* Tax[Text Field]

Auto-filled when you select tax.

* Amount

Amount auto fetched inclusive of tax and total price.

* Additional Detail[Text Field]

Include any additional comments or notes related to the items.

* **Add Item[Button]**

Click this button to add more items in the order.

* Additional Details

You will have the following additional buttons:

* Extra Charges

When you click on Extra charges it will show the following fields:

* Extra Charge Description[Text Field]

Enter a description for the extra charge.

* Total[Text Field]

Specify the total amount for the extra charge.

* Tax[Dropdown]

Select the tax rate for the extra charge.

* Total Tax[Text Field]

View the total tax amount for the extra charge.

* Comment:

A text field where you can add general comments or notes.

* Attach Signature (Supported Format: jpeg, jpg, png.)

Allows you to attach a signature in the supported image formats (jpeg, jpg, png).

The Order Total will be shown like this:

* Total (before tax):

The cumulative cost of all items before applying taxes.

* Total Tax (IGST) :

The total Integrated Goods and Services Tax (IGST) applied.

* Total (after tax) :

The overall cost of the order after incorporating taxes.

* Non-Taxable Extra Charges[Dropdown]

It will have the following fields:

* Add/Less[Dropdown]

Allows you to specify whether the extra charge is an addition or deduction.

* Description[Text Field]

Enter a description for the non-taxable extra charge.

* Amount[Text-Field]

Specify the numerical value or amount associated with the extra charge.

* Percentage/Rupees[Dropdown]

Choose between percentages or rupees to determine how the extra charge is calculated or represented.

* Grand Total :

It will display the total cost of the order.

* Advance To Pay :

Indicates any advance payment required for the order.

* Cancel[Button]
* Preview[Button]
* Save Draft[Button]

The "Save Draft" button is used when the user wants to save the entered data but indicates that the Invoice is not yet finalized or ready for official submission.

**When you click on Preview Button a new page will open up which will look like a template, it will display following things:**

* Sharing options on the top, you can share the template in pdf file format.
* Download button to download the template in PDF format
* Next Action Date and Deal status:

The Next Action Date refers to the agreed-upon or anticipated date for the next milestone or step in the deal process you can set it by clicking on the set button beside it. The Deal Status indicates the current phase or state of the overall deal. The Deal status can be accepted, rejected, or Request modifications.

* The Deal status will have dropdown if the client has not given any input then we can update the deal status manually from the dropdown.
* Cancel button to cancel the quotation
* The rest of the page will display all the details which were entered in a template format.
* It will also have these buttons:
  + Send for approval[Button]
  + Save and Send[Button]

Clicking the "Save" button typically commits the entered information and officially saves the Invoice data.

* Generate **the Sales Proforma Invoice button** at the end.

**Note: When the SQ will be sent via mail, there will be a button of Accept SQ, Reject SQ, Request modifications which will be reflected in deal status.**

**If the user clicks request modification we will make request as per the user’s request and can send the quotation again. When they click accept, we will send them sales proforma invoice**

**We can give the button on the top of copying the details and create new SQ it will lead to the new form of SQ generation where you can make changes as per need.**

If the request modification button is clicked, user will be redirected to a text page modification page which will be similar to SQ page only the product and other details which were sent will be auto-filled, user can change the details.

* + User can edit the supplier details.
  + User will have to enter the document number, can change the delivery date, can enter the amount in product details, can enter the delivery date for a specific product, can add a new product, also if any extra charges, attachments, additional details.

User can access this module via 3 ways one by clicking po button on the top, by clicking po button in rfq tab, by clicking the po button in rfq tab, The Po can be sent via mail and saved. Purchase invoice will be attached for future reference. Purchase invoice

**The Page of Quotations will display when document type SQ is selected:**

Filters:

* Creation Status [Dropdown]
  + Sent
  + Received
  + Draft
* Conversion Status [Dropdown]
  + All
  + Accepted
  + Rejected
  + Request Modification

The **Table view** will display following things:

* Quotation Number (View Button, template will open up)
* Company Name
* Deal Status
  + Accepted
  + Rejected
  + Request Modification
* Total Amount
* Requested modification (View button)

On clicking this a page or pop-up will open up which will show all the details of request modification. (We can have a button of accept and reject there whether or not we are accepting the modification by clicking which a notification can be sent to the buyer.)

* Created By
* Creation Date
* Delivery Date
* Next Action Date

##### Sales Details

###### Sales Proforma Invoice

* **Filters**
  + Approval Status
    - All
    - Approved
    - Rejected
  + Creation Status
    - All
    - Sent
    - Draft

When you select on Sales Proforma invoice it will have a pop-up for Adding/Selecting Supplier.

You can add a new Company by clicking on the Add Company Button. It will open a pop-up which was opened during adding single company.

You will be redirected to the Sales Proforma Invoice Page. It will have the following details:

Note: You can also directly enter the company name if the company already exists in the database and proceed.

* Buyer Details
* Contains information about the buyer, including their name, address and any additional relevant information.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of billing address below search bar.
* You can search the particular billing address and select from the list or add new billing address
* Add new billing address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
* Delivery Location
* This section will contain fields for the buyer's information, such as their name, contact details.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of delivery address below search bar.
* You can search the particular billing address and select from the list or add new delivery address
* Add new delivery address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
  + Supplier Details
* Provides information about the supplier or vendor from whom the purchase is being made, including their name, address, and any other pertinent details.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of supplier address below search bar.
* You can search the particular supplier address and select from the list or add new billing address
* Add new billing address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
* **Primary Document Details**

This section includes key details related to the primary transaction document, which is the Invoice

* Title(Transaction) [Text-Field] \*:

Represents the type of transaction being documented, in this case, an "Invoice." It provides clarity on the nature of the document.

* Proforma Invoice Number(Customisable)[Text field] \*

A unique identifier assigned to the Invoice. This number can be customized for ease of reference and tracking.

* Document Date[Auto filled]

Indicates the date when the Invoice document is issued or created. It helps establish a timeline for the transaction.

* PO number [Text-Field]

Refers to the unique identifier assigned to the associated Purchase Order. It establishes a link between the Invoice and the corresponding Purchase Order.

* PO Date[Date Picker]

Indicates the date when the Purchase Order associated with the Invoice was issued.

* Payment Term[date picker]

Specifies the agreed-upon terms and conditions for payment, including details such as due date.

* Payment Date [Date picker] \*

Specifies the store or location relevant to the Invoice. It may indicate the originating store or the store to which the products are billed.

* **Product Details:**

You will be provided with a template that allows you to include the items for the Invoice. It will include the following fields and elements for display.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| SKU \* | Product Name \* | HSN/SAC Code | Quantity \* | Pack size and UoM \* | Price | Delivery Date | Total before X | Tax | Amount | Additional  Detail |
| RM01 |  | 010101010 | 220 | 20 ltr |  |  | 0.25 |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |

* Search Bar

Search functionality enables you to quickly locate specific items within the template for efficient navigation and editing.

The following fields will be displayed which need to be filled in:

* SKU[Text-field with search option]

Select from a dropdown menu containing item identification options. When you select SKU it will automatically fill in the rest of the details like product name, HSN and Price which you can edit.

* Product Name[Text-field with search option]

Select a product name from the dropdown list or by typing the name.

* HSN/SAC Code[Text Field]

Enter the Harmonized System of Nomenclature (HSN) or Service Accounting Code (SAC) associated with the item.

* Quantity[Text Field]

Specify the quantity of the item being ordered.

* Pack size AND UOM [Dropdown]

Select the units of measurement and pack size from a dropdown menu.

* Total Before Tax[Text Field]

The initial price is pre-filled. You have the option to modify the price as needed, and you can reset it to the default price using the adjacent icon.

* Delivery Date:

Specifies the estimated delivery date.

* Tax[Dropdown]

Select the tax rate from a dropdown menu.

* Amount

Amount auto fetched inclusive of tax and total price.

* Additional Detail[Text Field]

Include any additional comments or notes related to the items.

* **Add Item[Button]**

Click this button to add more items in the order.

**Additional Details:**

You will have the following additional buttons:

* Extra Charges

When you click on Extra charges it will show the following fields:

* Extra Charge Description[Text Field]

Enter a description for the extra charge.

* Total[Text Field]

Specify the total amount for the extra charge.

* Tax[Dropdown]

Select the tax rate for the extra charge.

* Total Tax[Text Field]

View the total tax amount for the extra charge.

* Additional Details:

Subdivided into two sections:

* Bank Details

When you click on the bank details tab, there will be an option for selecting cash or you can select from the saved bank details. You can add bank details by clicking on the plus icon which will ask for the following things:

* Bank Name
* Account Name
* Account Number
* Branch
* IFSC
* MICR(Not Compulsory)
* Address(Not Compulsory)
* Save Button
* Terms & Conditions:

Allows you to input specific terms and conditions related to the Invoice.

* Comment:

A text field where you can add general comments or notes.

* Attach Signature (Supported Format: jpeg, jpg, png.)

Allows you to attach a signature in the supported image formats (jpeg, jpg, png).

The Order Total will be shown like this:

* Total (before tax):

The cumulative cost of all items before applying taxes.

* Total Tax (IGST) :

The total Integrated Goods and Services Tax (IGST) applied.

* Total (after tax) :

The overall cost of the order after incorporating taxes.

* Non-Taxable Extra Charges[Dropdown]

It will have the following fields:

* Add/Less[Dropdown]

Allows you to specify whether the extra charge is an addition or deduction.

* Description[Text Field]

Enter a description for the non-taxable extra charge.

* Amount[Text-Field]

Specify the numerical value or amount associated with the extra charge.

* Percentage/Rupees[Dropdown]

Choose between percentages or rupees to determine how the extra charge is calculated or represented.

* Grand Total :

It will display the total cost of order.

* Round Off Button:

There will be round off button beside the Grand Total, to round off the total amount.

* Cancel[Button]
* Preview[Button]
* Save Draft[Button]

The "Save Draft" button is used when the user wants to save the entered data but indicates that the Invoice is not yet finalized or ready for official submission.

**Sales Proforma Invoice Page:**

* Sharing options on the top, you can share the template in pdf file format.
* Download button to download the template in PDF format
* Cancel button to cancel the quotation
* Send for Approval [Button]

When you click this a pop up will open up with the list of users along with the particular department they are assigned and role. You can select any user and click on send button.

* Save and Send[Button]

Clicking the "Save" button typically commits the entered information and officially saves the Invoice data.

* The page will contain all the details related to purchase order in template.
* Create **E invoice, Sales Return** and **Eway bill button** at the end.

Note: Generate E way bill button will be disabled until and unless the total amount is greater than the particular amount.

**Table view :**

* Sales Proforma Invoice number(view button)
* Company
* Title
* Delivery Date
* Creation Date
* Amount
* Amount to pay
* Amount Paid
* Created By
* Internal approval status

###### Sales Return

When you select on **Sales Return** it will have a pop-up for Adding/Selecting buyer. You will only create sales return once it is accepted.

You can add new Company by clicking on Add Company Button. It will open up a form which was opened when adding a single company in Buyers/Suppliers module.

You will be redirected to the sales Return Page. It will have the following details:

Note: You can also directly enter the company name if the company already exists in the database and proceed.

* Goods Received by
* Contains information about the buyer, including their name, address and any additional relevant information.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of billing address below search bar.
* You can search the particular billing address and select from the list or add new billing address
* Add new billing address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
* **Delivery Location**
* This section will contain fields for the buyer's information, such as their name, contact details.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of delivery address below search bar.
* You can search the particular billing address and select from the list or add new delivery address
* Add new delivery address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
  + **Delivery Location for Sales Return**

This field will be empty by default user will have to click on the edit button. They can select the address from the saved address or can add new address.

* + **Goods Sent By**
* Provides information about the supplier or vendor from whom the purchase is being made, including their name, address, and any other pertinent details.
* When you click on the Edit icon beside a pop-up will open up which will contain search bar, add icon on the top and list of supplier address below search bar.
* You can search the particular supplier address and select from the list or add new billing address
* Add new billing address:
  + Name[Text Field]

Represents the name of the company associated with the buyer, delivery location, or supplier. It identifies the business entity involved (Can’t be edited).

* + Email[Text Field]
  + Contact[Text Field]
  + Address 1[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + Address 2[Text Field]

Captures the street address, including any additional information necessary to specify the physical location.

* + PIN[Text Field]

Represents the postal code or PIN code associated with the address.

* + City[Text Field]

Specifies the city or locality where the company is located. Auto-fetched

* + Country[Dropdown]

Indicates the country in which the company is situated. Auto-fetched

* + State

Specifies the state or region within the country where the company is located. Auto-fetched

* + Save button.
* **Primary Document Details**

This section includes key details related to the primary transaction document, which is the Purchase Return.

* Sales return Number[Text-field] \*
* Document Date

Represents the date when the Purchase return is issued. Auto filled, non-customisable.

* Delivery Date[date picker] \*
* Invoice number[Text-field]\*
* Invoice Date[Text-field]\*
* **Product Details:**

You will be provided with a template that allows you to include the items for the purchase return. It will include the following fields and elements for display.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| SKU \* | Product Name \* | Quantity \* | Pack size and UoM \* | Price | Delivery Date | Delivered | Sales return qty | Amount | Additional  Detail |
| RM01 |  | 2 | 20 ltr |  |  | 0.25 |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

**The following fields will be displayed which will be auto filled when you write the Invoice number and amount except purchase return qty:**

* SKU
* Product Name
* Quantity
* Pack size AND UOM
* Delivery Date
* Delivered
* Sales return qty\*
* Amount
* Additional Detail
* **Add Item[Button]**

Click this button to add more items in the order.

* Additional Details

You will have the following additional buttons:

* Attachments [Max 6 files \* 5 MB]

Allows you to attach files or documents related to the Sales Quotation.

* Comment:

A text field where you can add general comments or notes.

* Attach Signature (Supported Format: jpeg, jpg, png.)

Allows you to attach a signature in the supported image formats (jpeg, jpg, png).

* Save Draft[Button]

The "Save Draft" button is used when the user wants to save the entered data but indicates that the purchase order is not yet finalized or ready for official submission.

* Send For Approval [Button]

When this button is clicked a pop-up will open up of the list of users, you can send the document for approval to the specific person or you can send the document to all the users by clicking select all button on top.

* Save and Send[Button]

Clicking the "Save" button typically commits the entered information and officially saves the purchase order data.

When you click on Save and send button it will redirect you to new page and a template will be shown which will be sent to the particular company.

**Table View:**

* Sales Return No (View Button)
* Sales proforma invoice number
* Company
* Creation Date
* Delivery Date
* Created By
* No. of items
* sales return Qty(view button)

# Approvals

The right to approve will only be with the Super admin and a limit can be set accordingly and also that will be according to the benchmark that has to be set by the company itself, we need to give a margin to set the bar in the settings so that company can change the approval limit by their own.

The page will consist of 2 tabs/subpages inside:

1. Sales Approval
2. Purchase Approval
   1. Sales Approval

The landing page will have a dashboard that will give a summary   
There must be a filter in the screen, with Approved, Rejected & Pending for the status of All the sales document

* Document Type[dropdown]
  + All
  + Sales Proforma Invoice
  + Sales Quotation
  + Sales Return
* Approval Status [dropdown]:
  + Pending
  + Approved
  + Rejected
* Assigned to me [button][Numbers can be shown on top of button that these still needs to be checked]

When you click on this you can see the list of documents assigned specifically to you.

When you select pending the checkbox will be shown, you can select the particular document and there will option above the table, whether to approve or reject the document.

**The table format will include the following fields:**

* Document Number(icon beside document number, when you click it you will be redirected to new page and will be able to see the whole info related to the document)

A unique identifier of the order approval document.

* Document Type:

Indicates whether the order is a Sales quotation, Sales return or an Invoice etc.

* Approval status:

The status of the particular goods will be shown.( accept, reject , Pending )

* Created By:

The name or details of the user who created the order.( the person who sent document from sales or purchase

* Created on:

The date when the order was created.

* User Assigned (by default super admin)
  + Field only visible to super admins.
* Action By:

The name of the person who approves or rejects the order will be shown under this head.( by default super admin )

* Total Amount
* Delivery Date:

The expected delivery date for the ordered goods by the company or the client.

**Purchase Approval**

For Purchase the table view will be the same only thing that will change is filters of document type:

* Tabs
  + Purchase Order
  + Purchase Return

# Order Management

It will have two tabs Sales and Purchase.

**Sales:**

The Sales tab will display all the sales-related transactions and documents. This section will focus on the management of sales orders, invoices, and other sales-related activities.

There will be

* Tabs
* Sales Proforma Invoice(By default this will be selected)
* Sales Return
* Status [dropdown] for Sales Proforma Invoice
  + Pending

The order has been placed, but it has not yet been dispatched.

* + Dispatched

The order has been shipped or dispatched to the customer.

* + Partially Dispatched

Part of the order has been dispatched, while the remaining items are still pending.

* + Delivered

The entire order has been successfully delivered to the customer.

* + Partially Delivered

A portion of the order has been delivered, while the remaining items are still pending.

* + Cancelled

The order has been cancelled and will not be processed further.

The table list will display the following things when document type is Sales proforma Invoice:

* + Invoice No(View Button: On clicking which user will be redirected to Sales Proforma Invoice template)

A unique identifier for the Sales proforma invoice document.

* + Sales return(View Button: On clicking which user will be redirected to Sales Return Template)
  + Title

Title of the order confirmation.

* + Company Name
  + Delivery Status
  + Total products
  + Delivery Date
  + Creation Date
  + Action By
  + Delivered
  + Amount
  + Actions Tab (edit button)

**Note: When the user clicks on edit button a products detail table will be opened up which was filled while creating invoice you can either fully sent all the products delivery status will be shown accordingly for all order management beside the particular product and you can select the overall status from the above filter.**

* Status [dropdown] for Sales Return
  + All
  + Pending

The order has been placed, but it has not yet been dispatched.

* + Dispatched

The order has been shipped or dispatched to the customer.

* + Delivered

The entire order has been successfully delivered to the customer.

* + Cancelled

The order has been cancelled and will not be processed further.

When sales return is selected the table view will be shown like this. Also when you click on edit button it will open up the product details table of Sales return you can change the delivery status from here:

* + SR no (view button redirect you on to sr template)
  + Invoice number (view button)
  + Company
  + Delivery Status
  + Total products
  + Return qty
  + Delivery Date
  + Creation Date
  + Amount
  + Actions tab(edit button)

**Purchase Tab:**

The Purchase tab will display all the purchase-related transactions and documents. This section will focus on the management of Purchase Order, Purchase Return related activities.

* Tabs
* Purchase Order
* Purchase Return
* Status [dropdown] for Purchase Order
  + Pending

The order has been placed, but it has not yet been dispatched.

* + Dispatched

The order has been shipped or dispatched to the customer.

* + Partially Dispatched

Part of the order has been dispatched, while the remaining items are still pending.

* + Delivered

The entire order has been successfully delivered to the customer.

* + Partially Delivered

A portion of the order has been delivered, while the remaining items are still pending.

* + Cancelled

The order has been cancelled and will not be processed further.

The table list will display the following things for Purchase return and when you click on edit button under actions tab the table of purchase order product details will open up:

* + Po number(View button)
  + Purchase return no(view button redirect you on to pr template)
  + Title
  + Company
  + Delivery Status
  + Total products
  + Return items
  + Delivery Date
  + Creation Date
  + Action By
  + Amount
  + Actions tab (edit button)

The table list will display the following things for Purchase return and the dropdown will be same as Sales return also when you click on edit button under actions tab the table of purchase return product details will open up:

* + Purchase return no(view button redirect you on to pr template)
  + Po number(View button)
  + Company
  + Delivery Status
  + Total products
  + Return items
  + Delivery Date
  + Creation Date
  + Action By
  + Amount
  + Actions tab (edit button)

# Payments

Payments tab will have:

Filters:

* Status:
* Receivable
* Payable
* Received
* Paid
* Overdue Receivable
* Overdue Payable

**By default Receivable will be selected**

* Sort by:
* Month
* Today
* Year

4 Data cards:

* Total Payable
* Total Receivable
* Overdue Payable
* Overdue Receivable

You can select any one from this and the table view will be changed accordingly.

The table view will represent the fields like:

* Document Number(view button)
* Document Type
* Company Name
* Document Date
* Payment Date
* Amount to Pay
* Amount Paid
* Advance Amount
* Total Amount
* Last Modified At
* Action By
* Actions Tab(edit button)

When you select edit button under actions tab column that row will open up with the details and you can write/edit the Amount paid amount and according to that the Amount to pay amount will be changed.

# Settings

In settings you have to manage the document numbers like Purchase Order it should be PO ETC..

**Documents Module**

* 1. **Document Number Format**

Table View will have all the documents present in the system:

* Document Type(by default)
* Prefix
* Next Number
* Document Number
* Actions Tab (Edit button)

When you click on edit button a pop up will open up which will have fields like:

* Document Type (Auto filled)
* Prefix[Text field]\*
* Next Number [Text-Field] \*
* Document Number(Auto filled)

# Emails and notifications to be sent

* Stock level email and notification to be sent if the stock level reaches below the minimum level.
* RFQ template to be sent in the mail when clicked on send button with link of the RFQ form where the supplier will input their details. When clicked on submit button we will receive the information in our system, RFQ summary will automatically get filled.
* Purchase order template to be sent in the mail when clicked on send button.
* Sales quotation to be sent when clicked on send button along with three buttons Accept, Reject, Request for Modification and according to the option selected by the buyer the deal status will get reflected accordingly.
* Sales Proforma invoice to be sent when clicked on send button.
* Order Delivery status notification to be sent when the goods are dispatched or partially dispatched from our warehouse with the list of products that are dispatched or partially dispatched same for the delivery, delivery mail should also be sent. When the order status is delivered or partially delivered our inventory should also increase or decrease accordingly
* When the order and payment due date is near a notification as well as mail should be sent to the designated person.

Notifications to be sent to the client:

RFQ (Request for Quotation) email:

Trigger: When the "Send" button is clicked on the RFQ form.

Recipient: The supplier.

Content: Include the RFQ form link, where the supplier can input their details.

Purchase Order email:

Trigger: When the "Send" button is clicked on the Purchase Order template.

Recipient: The supplier/vendor.

Content: Include the Purchase Order details and any relevant information.

Sales Quotation email:

Trigger: When the "Send" button is clicked on the Sales Quotation.

Recipient: The customer.

Content: Include the Sales Quotation details and three buttons: Accept, Reject, and Request for Modification.

Sales Proforma Invoice email:

Trigger: When the "Send" button is clicked on the Sales Proforma Invoice.

Recipient: The customer.

Content: Include the Sales Proforma Invoice details and any relevant information.

Order Dispatch/Delivery Status notification email:

Trigger: When the goods are dispatched or partially dispatched from the warehouse.

Recipient: The customer.

Content: Include the list of products that are dispatched or partially dispatched, along with the delivery status.

Notifications triggered within the system:

Stock level email and notification:

Trigger: When the stock level reaches below the minimum level.

Recipients: Relevant personnel (e.g., inventory managers).

Content: Notify about the low stock level and the need to replenish.

Order and Payment Due Date notification email:

Trigger: When the order and payment due date is approaching.

Recipients: Designated personnel (users, managers, and administrators).

Content: Notify about the impending due date and any necessary actions.

General notifications:

Trigger: Based on various events and actions within the system.

Recipients: Appropriate personnel (users, managers, and administrators).

Content: Provide relevant notifications as per the system's requirements.