EMPLOYEE USER MANUAL

Federation of Indian Chambers of Commerce and Industry, FICCI
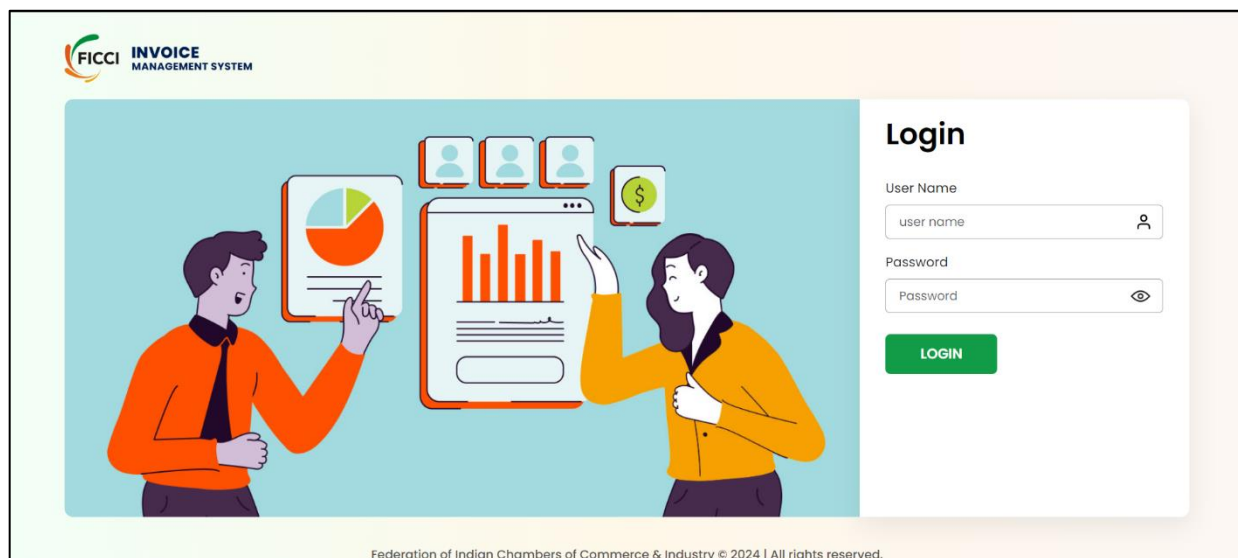
Login Page

Please Enter the URL Mentioned below in your web browsers such as Google Chrome, Microsoft Edge, or Firefox.
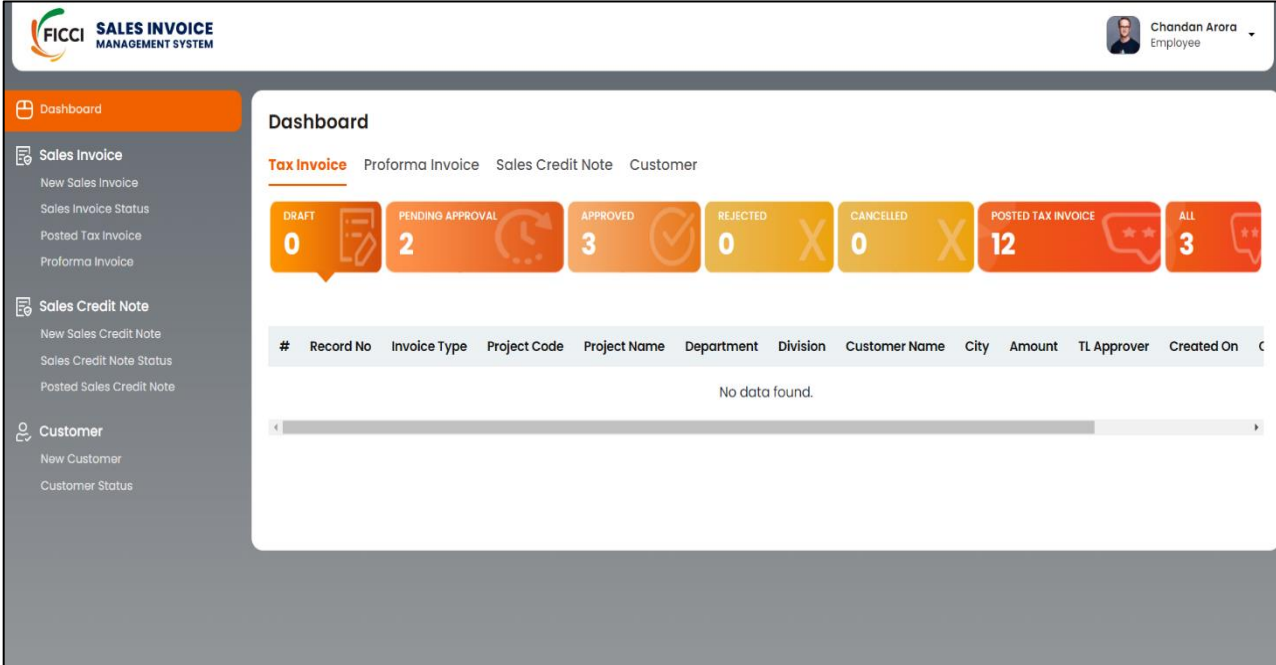
URL is http://siportal.myassociates.org/login

After Entering this URL, you will see the below page

- It is a login page in which you can enter your Username and Password to log in/gain access to the portal.
- After you log in, a pop-up message will appear that says "Success (Logged in Successfully)" and redirects to the Dashboard Page.

🖥 **Dashboard**

The user will be logged in successfully and will be redirected to the Dashboard where the user will be able to see the page with the description as shown in the above image.

👤 Customer

On the '**Customer**' Module, there are two tabs '**New Customer**' (for Add New Customer) and '**Customer Status**' (for Checking customer status). Click on whichever applies to you.
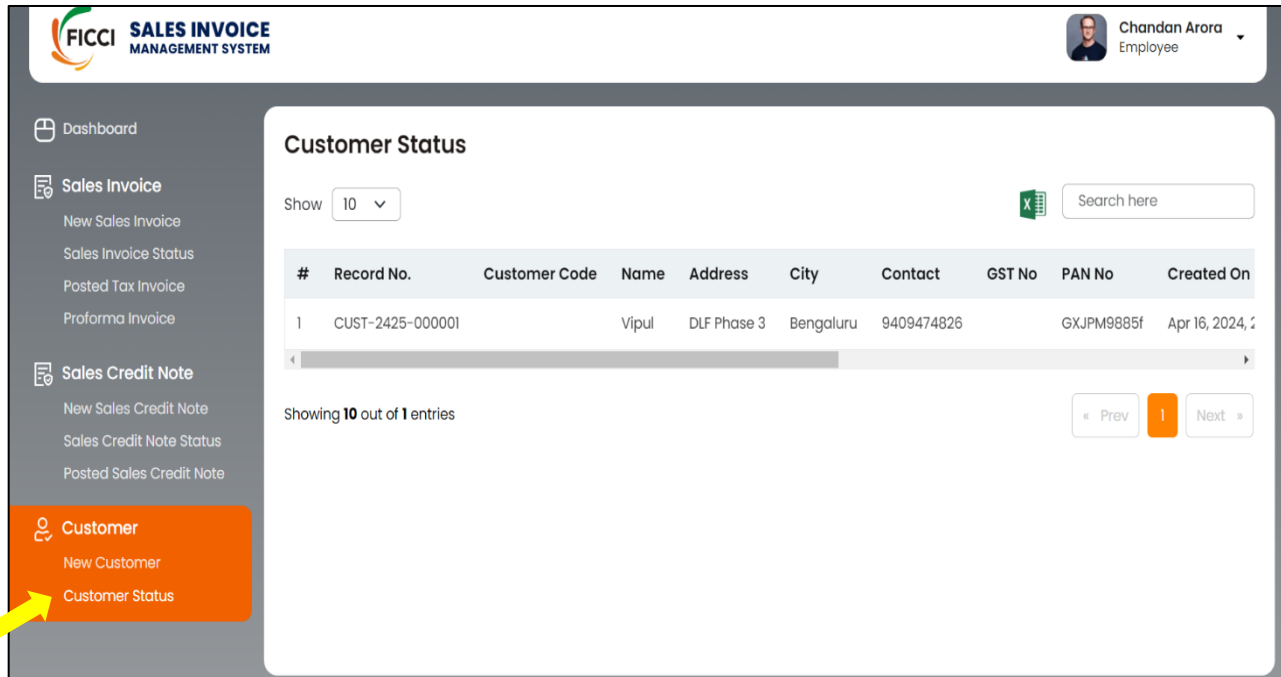
1. Add New Customer

- The user has to fill in all the mandatory details required to add a new customer.

Case 1: Clicking on the "**Save as Draft**" button after entering customer details saves the data temporarily and makes it viewable and editable on the Customer Status page.

Case 2: Clicking on the "**Submit**" button after entering customer details will directly submit the data and make it viewable on the Customer Status page. The details are then sent to FICCI Portal for approval.
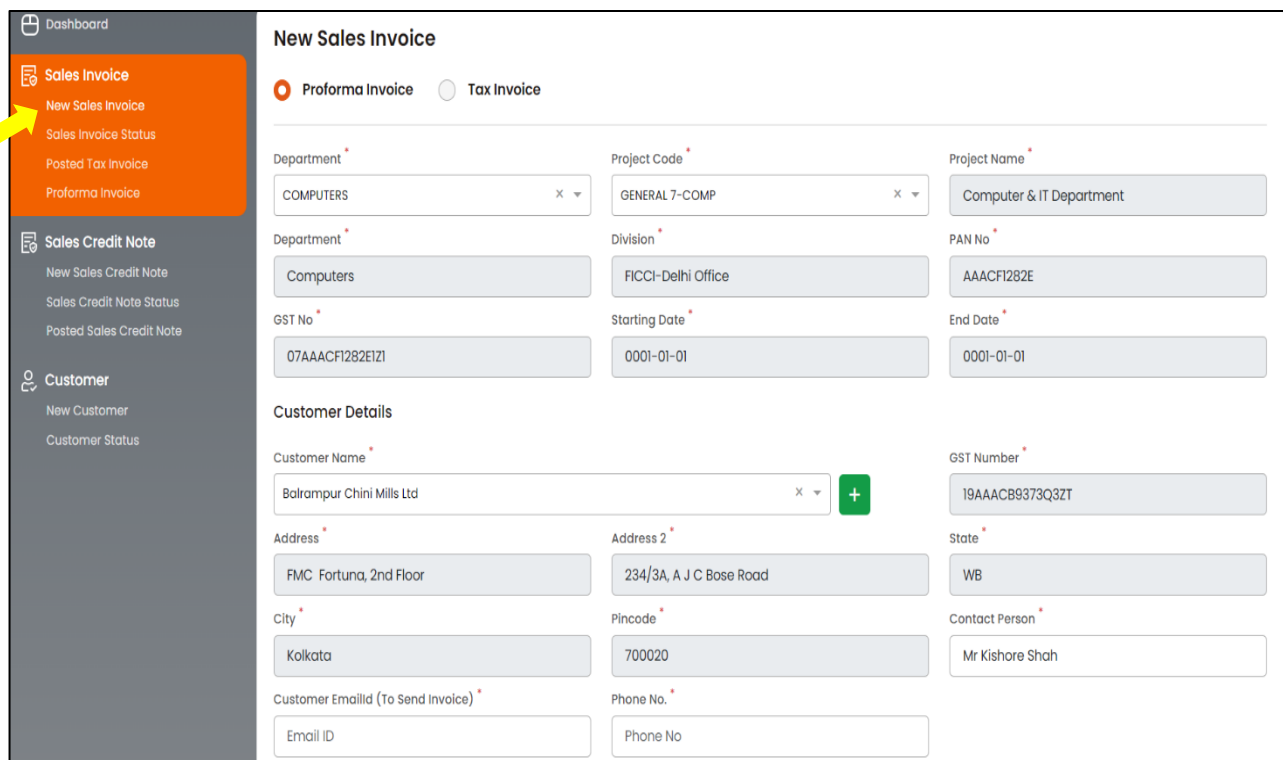
2. Customer Status

- On the Customer Status page, the User can find the customer details.
- Users can search for a customer in the "Search here" section by entering various details, except the Record No.
- The user can view up to a maximum of 100 records by clicking on the dropdown in the show option.
- To navigate to the next or previous page, click the buttons in the bottom right corner.

📄 Sales Invoice

1. New Sales Invoice

On the '**New Sales Invoice**' Page, there are two tabs '**Proforma Invoice**' (for preliminary bills or estimated invoices) and '**Tax Invoice**' (for accounting and taxation purposes). Click on whichever applies to you.

Proforma Invoice

- In the Proforma Invoice case, Users can select department and project codes from a dropdown menu, and the remaining grey section will be filled automatically.
- In the Customer Details section, the user can select a customer name from a dropdown menu.
- If the customer name is not found, the user can add a new customer by clicking on the **plus (+)** button and accessing the Add New Customer feature.
- If the user attempts to add a customer name that already exists, a pop-up message will appear on the screen.

Existing Sales Invoice for this Customer

#	Invoice Type	Department	Created By	Created On	Invoice Amount	Status
1	Proforma Invoice	Computers	chandan.arora@ficci.com	Apr 16, 2024, 11:17:31 AM	100000000	DRAFT
2	Tax Invoice	Computers	chandan.arora@ficci.com	Apr 16, 2024, 11:17:31 AM	100000000	REQUEST TAX INVOICE
3	Proforma Invoice	Computers	chandan.arora@ficci.com	Apr 16, 2024, 11:17:31 AM	24150000	
4	Proforma Invoice	Computers	chandan.arora@ficci.com	Apr 16, 2024, 11:17:31 AM	0	DRAFT
5	Proforma Invoice	Computers	chandan.arora@ficci.com	Apr 16, 2024, 11:17:31 AM	49560	DRAFT
6	Proforma Invoice	Computers	chandan.arora@ficci.com	Apr 16, 2024, 11:17:31 AM	0	DRAFT
7	Proforma Invoice	Computers	chandan.arora@ficci.com	Apr 16, 2024, 11:17:31 AM	0	DRAFT
8	Proforma Invoice	Computers	chandan.arora@ficci.com	Apr 16, 2024, 11:17:31 AM	0	DRAFT
9	Proforma Invoice	Computers	chandan.arora@ficci.com	Apr 16, 2024, 11:17:31 AM	16800	DRAFT

- The user has the option to choose between "**Continue**" or "**Cancel**" depending on their requirement.

- In the Sales Line section, click on the **Add Line** button to add one or more lines.
- After adding, the **Calculate** Button option will appear, which calculates IGST, CGST, and SGST.
- For Upload Attachments, the User can select (PO, E-Mail Confirmation, LOI, or Other Documents) from the dropdown menu, and after uploading a document by clicking "**Choose files**," the file details will be displayed.

- Remarks for the FICCI Accounts Team are optional.
- In the case of "**Save as Draft**", uploading an attachment is optional, but in the case of "**Submit**", uploading an attachment is mandatory.

TAX Invoice

- In the Tax Invoice case, Users can select department and project codes from a dropdown menu, and the remaining grey section will be filled automatically.
- In the Customer Details section, the user can select a customer name from a dropdown menu.
- If the customer name is not found, the user can add a new customer by clicking on the **plus (+)** button and accessing the Add New Customer feature.
- If the user tries to add a customer name that already exists, a pop-up message will appear on the screen, similar to the Proforma case.

Sales Line

Field	
Nature of Income *	Select
Quantity *	Quantity
GST Group Code *	Select
Direct Unit Cost * (Exclusive GST)	Direct Unit Cost
Description/Narration to Print on Invoice *	Description
	Add Line
Total Base Amount	Total Base Amount
Total GST Amount	Total GST Amount
Total Invoice Amount (Incl.GST)	Total Invoice Amount (Incl.GST)

#	Nature of Income	Description	Quantity	Direct Unit Cost *(Exclusive GST)	Line Amount	GST Group Code	HSN/SAC Code	IGST Amount	CGST Amount	SGST Amoun
1	Life Membership FICCI & FACT (CAP)	Description	40	780	31200	SER-05	998363			

Calculate

Upload Attachments (PO,E-Mail Confirmation,LOI,Other Documents)*(Max File Size 5 MB only)

Attachment	Select	Upload Document	Choose Files	No file chosen	Upload

#	Category	File Type	File Name	Action
1	PO	.xlsx	cutomer-worklow.xlsx	🗑

Remarks for FICCI Accounts Team

Okay

Save as Draft   Submit

- In the Sales Line section, click on the **Add Line** button to add one or more lines.
- After adding, the **Calculate** Button option will appear, which calculates IGST, CGST, and SGST.
- For Upload Attachments, the User can select (PO, E-Mail Confirmation, LOI, or Other Documents) from the dropdown menu, and after uploading a document by clicking "**Choose files**," the file details will be displayed.
- In Action, users have the option to delete attachments.
- The user has the option to write Remarks for FICCI Account Team, but it is not a required field.
- In the case of "**Save as Draft**", uploading an attachment is optional, but in the case of "**Submit**", uploading an attachment is mandatory.

Sales Invoice Status

- In the Sales Invoice Status page, the User can find the customer details of both (i.e. Proforma Invoice and Tax Invoice) lists.
- Users can search for a customer in the "**Search here**" section by entering various details, except the Record No.
- The user can view up to a maximum of 100 records by clicking on the dropdown in the **show** option.
- To navigate to the next or previous page, click the buttons in the bottom right corner.

- The user can view the status of the customer.
- Under the "**Action**" section, the user can choose to view, edit, or delete items as needed.

Posted Tax Invoice

- In the Posted Tax Invoice page, the User can find the customer details.
- Users can search for a customer in the "**Search here**" section by entering various details, except No.
- The user can view up to a maximum of 100 records by clicking on the dropdown in the **show** option.
- To navigate to the next or previous page, click the buttons in the bottom right corner.

- In the "**Action**" section, the user can view Posted Tax Invoice details.
- Clicking on the view icon, a new page "**Posted Tax Invoice**" will open with details of the customer.

Proforma Invoice

- In the Proforma Invoice page, the User can find the customer details.
- Users can search for a customer in the "**Search here**" section by entering various details, except No.

- The user can view up to a maximum of 100 records by clicking on the dropdown in the **show** option.
- To navigate to the next or previous page, click the buttons in the bottom right corner.

- In the "**Action**" section, the user can view Proforma Invoice details.
- Clicking on the view icon will open a new page "**Posted PI invoice**" with details of the customer.

📄 Sales Credit Note

New Sales Credits Note

- In the New Sales Credit Memo (Tax Invoice) case, Users can select Invoice No. and Memo Type from a dropdown menu and enter the Credit Amount. The remaining grey section will be filled automatically.

- For Upload Attachments, the User can select (PO, E-Mail Confirmation, LOI, or Other Documents) from the dropdown menu, and after uploading a document by clicking "**Choose files**," the file details will be displayed.

- In Action, users have the option to delete attachments.
- The user has the option to write Initial Remarks, but it is not a required field.
- In the case of "**Save as Draft**", uploading an attachment is optional, but in the case of "**Submit**", uploading an attachment is mandatory.

Sales Credits Note Status

- In the Sales Credit Note Status page, the User can find the status of the sales credit note.
- Users can search for a customer in the "**Search here**" section by entering various details, except the Record No.
- The user can view up to a maximum of 100 records by clicking on the dropdown in the **show** option.
- To navigate to the next or previous page, click the buttons in the bottom right corner.

- Under the "**Action**" section, the user can choose to view and delete items as needed.

Posted Sales Credits Note

- In the Posted Sales Credit Note page, the User can find the posted sales credit note.
- Users can search for a customer in the "**Search here**" section by entering various details, except the Record No.
- The user can view up to a maximum of 100 records by clicking on the dropdown in the **show** option.
- To navigate to the next or previous page, click the buttons in the bottom right corner.
- Under the "**Action**" section, the user can only view items as needed.

Thank You