

INVOICE PORTAL USER MANUAL

FOR

**Federation of Indian Chambers of Commerce and
Industry, FICCI**

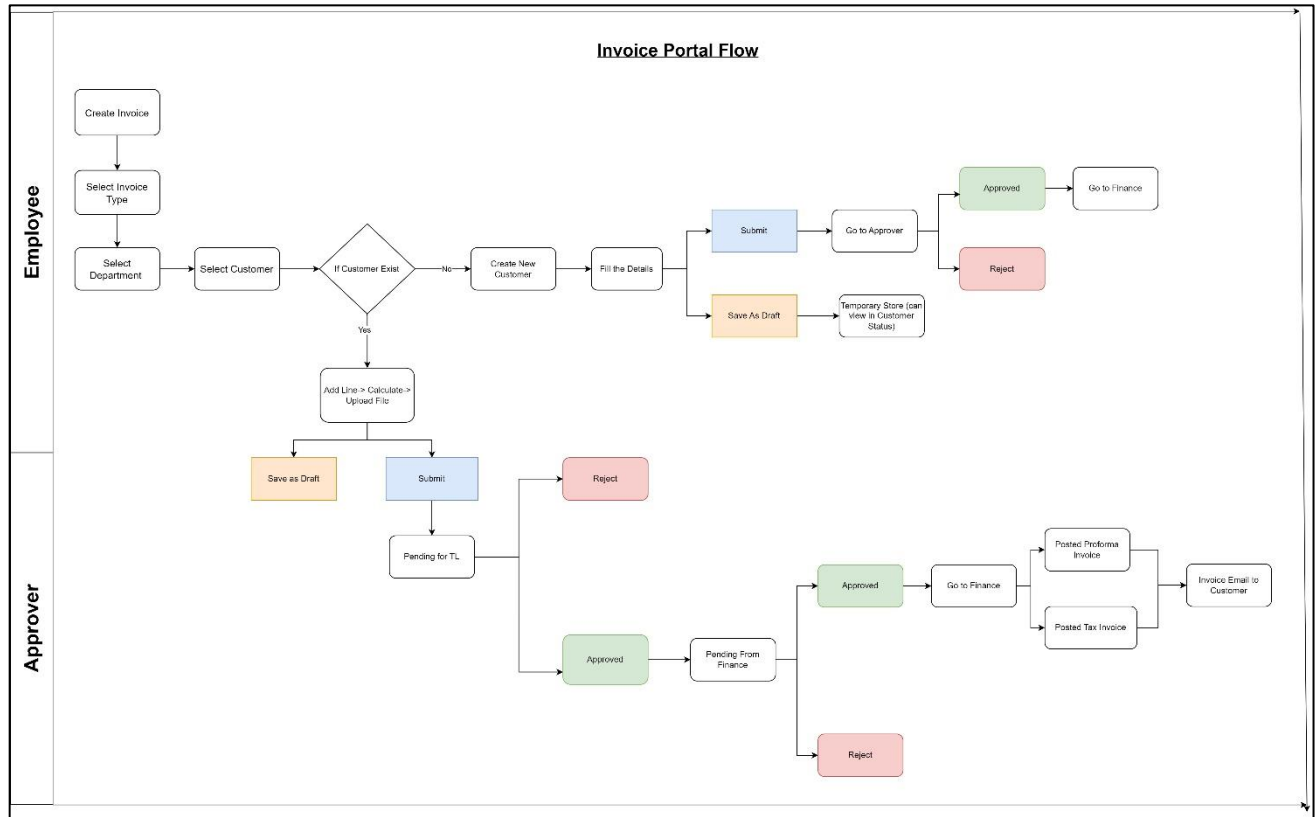


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1. Invoice Portal Flow



[Click here to see the diagram](#)

Please Note: Because the following graphics appear pixelated due to document sizing, please refer to the diagram included in the email.

2. Login Page

Please Enter the URL Mentioned below in your web browsers such as Google Chrome, Microsoft Edge, or Firefox.

Log in to <https://employeezone.ficci.in> with your email ID and password, once logged in Click on Invoice Portal Tile.

You can also go to <https://invoiceportal.ficci.in/login> and enter your email ID and password to Log in. Once you log in successfully, your Dashboard will open.

After Entering this URL, you will see the below page

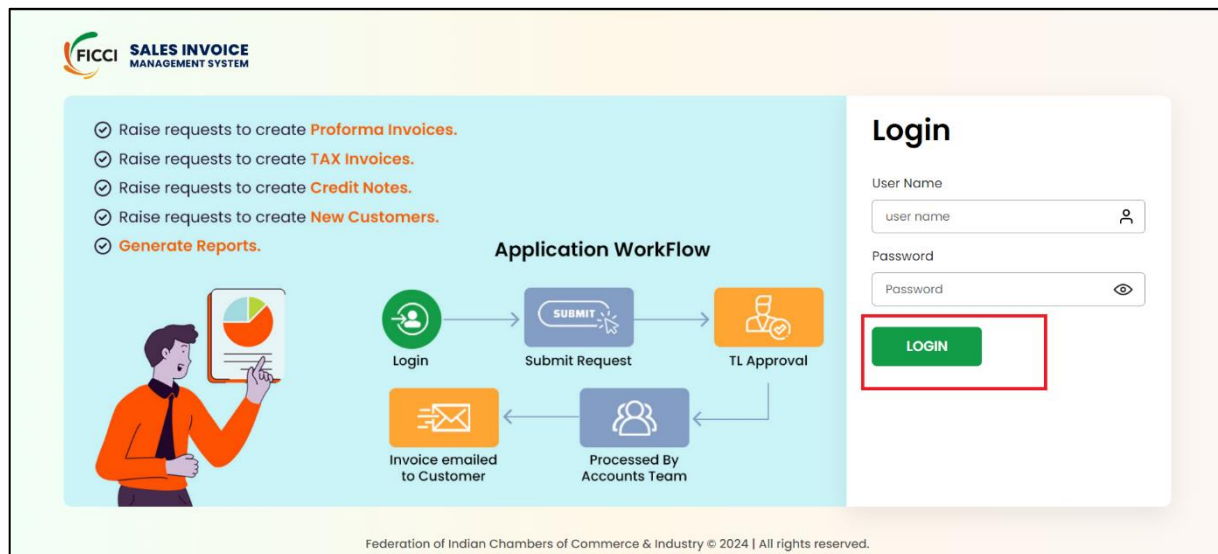


Figure 1: Login Page

Users can log in with a Username and Password to access the portal for:

1. **Employees**
2. **Approvers**
3. **Admin**

After logging in successfully, a notification will pop up confirming your login: "Success! You are now logged in." You'll then be redirected to the Dashboard Page.

LOGIN FOR EMPLOYEE

3. Dashboard

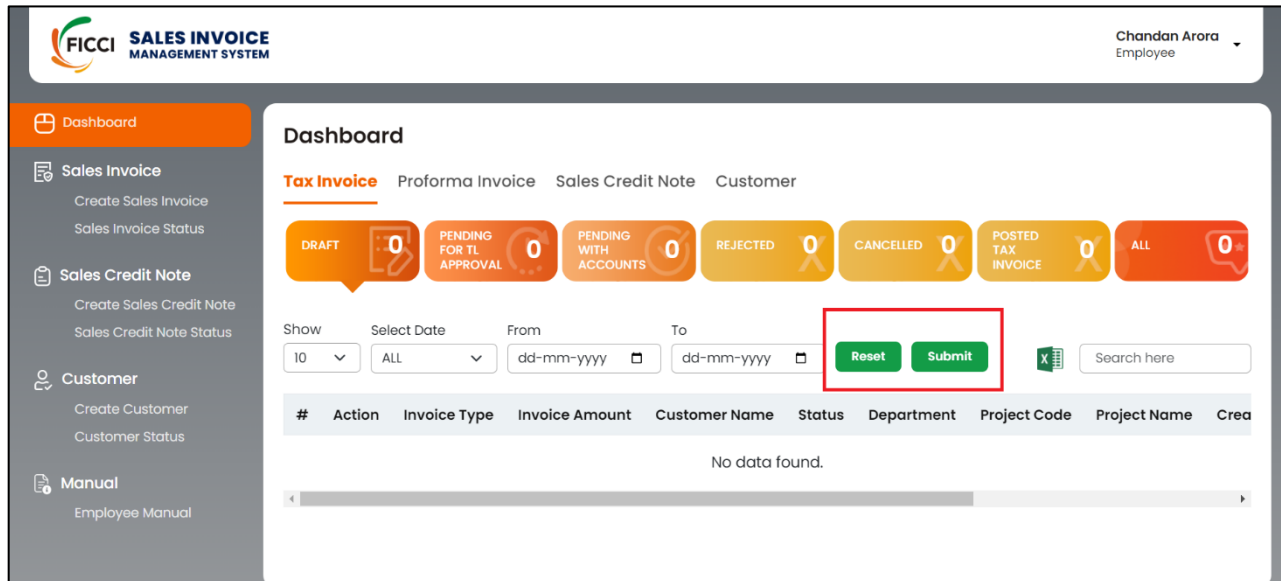


Figure 2: Dashboard

- The Dashboard is divided into four subsections, you can see the status by clicking on that tab.
 - **Tax Invoice**
 - **Proforma Invoice**
 - **Sales Credit Note**
 - **Customer**
- The user can find the Status of all sales Invoices by clicking on **Sale Invoice Status** button on the left side menu.
- Click on the dropdown to select from the following predefined date ranges: ALL, Today, Yesterday, Last 7 Days, Last 30 Days.
- If the user prefers to set a custom date range, use the FROM and TO calendar tabs. Click on the FROM tab to select the start date from the calendar. Click on the TO tab to choose the end date from the calendar.
- After selecting the desired date range, click on the **SUBMIT** button to apply the filter.
- The records in the subsection will be updated to display only those within the selected date range.
- To clear the date filters and view all records again, click on the **RESET** button.

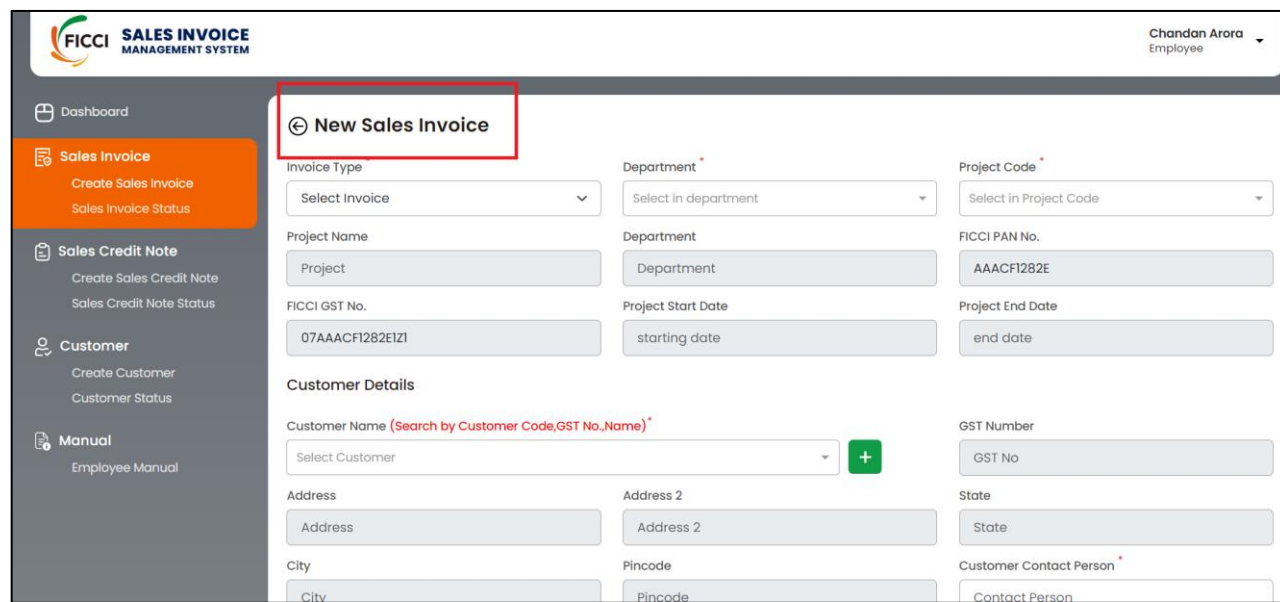
4. Sales Invoice

4.1 Create Sales Invoice

On the left menu click on **Create Sales Invoice**, now under Invoice Type as per your requirement, select **Proforma Invoice** (for preliminary bills or estimated invoices) and **Tax Invoice** (for accounting and taxation purposes).

Users can first request a Proforma Invoice and later convert it into a Tax Invoice.

Users can cancel a Proforma Invoice but need to raise a **Sales Credit Note** request to reverse a Tax Invoice.



The screenshot displays the 'FICCI SALES INVOICE MANAGEMENT SYSTEM' interface. On the left, a sidebar menu includes 'Dashboard', 'Sales Invoice' (highlighted with an orange bar, containing 'Create Sales Invoice' and 'Sales Invoice Status'), 'Sales Credit Note' (containing 'Create Sales Credit Note' and 'Sales Credit Note Status'), 'Customer' (containing 'Create Customer' and 'Customer Status'), and 'Manual' (containing 'Employee Manual'). The main content area is titled 'New Sales Invoice' (indicated by a red box). The form is divided into several sections: 'Invoice Type' (a dropdown menu), 'Department' (a dropdown menu), and 'Project Code' (a dropdown menu). Below these are 'Project Name' (a text field), 'Department' (a text field), and 'FICCI PAN No.' (a text field). The 'FICCI GST No.' is pre-filled with '07AAACF1282E1Z1'. There are also fields for 'Project Start Date' (labeled 'starting date') and 'Project End Date' (labeled 'end date'). The 'Customer Details' section includes a 'Customer Name' dropdown (with a search prompt 'Search by Customer Code,GST No.,Name') and a green '+' button to add a new customer. To the right of this is the 'GST Number' section with a 'GST No.' text field. At the bottom, there are fields for 'Address', 'Address 2', 'City', 'Pincode', 'State', and 'Customer Contact Person' (labeled 'Contact Person'). The top right corner shows the user 'Chandan Arora' with the role 'Employee'.

Figure 3: Create Sales Invoice

- Select the appropriate department and project codes from these dropdowns. Once selected, the remaining grey section will be filled automatically with related details.
- In the Customer Details section, select the customer's name from the dropdown menu.
- If the customer's name is not listed, user can add a new customer by clicking on the plus (+) button next to the dropdown.
- User can refer [Add New Customer](#) page.
- Once the user submits a new customer request, the Accounts team will approve the request, and then the user can create an invoice request against that customer.
- The user can track the customer request status from the [Customer Status Tab](#).

Sales Line

Nature of Income * Quantity * GST Group Code *

Direct Unit Cost * (Exclusive GST) Description/Narration to Print on Invoice * **Add Line**

Total Base Amount Total GST Amount Total Invoice Amount (Incl GST)

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

Attachment * Upload Document *

#	Category	File Type	File Name	Action
1	PO	.pdf	FICCI_Portal_Invoice_Process.pdf	

Remarks for FICCI Accounts Team

User Remarks

Figure 3.1: Create Sales Invoice

- Select the department and project code from the dropdown menu, other details will be filled automatically. In the Customer Details section, the user can select a customer name from a dropdown menu. You can search for customers by Organization Name, GST No. etc. Please verify the address and other details before going to the next step. Once you select the customer you may see a pop-up window of existing invoices of the selected customer, you can verify the list to avoid creating duplicate invoices.
- In the Customer Email ID field provide an email Id on which the sale invoice will be sent automatically from the system.
- Fill the necessary details in the Sales Line section. This includes the nature of Income, Quantities, GST Group Code, Direct Unit Cost (Excluding taxes), and Descriptions/Narration to print on the Invoice.
- After filling in the details for one-line item, click the **Add Line** button to add one or more additional line items to the invoice.
- Once the user has added all the necessary line items, Click the **Calculate** button to automatically calculate the IGST, CGST, and SGST based on the entered details.
- For uploading attachments, select the type of document you want to upload from the dropdown menu. Options include PO (Purchase Order), E-Mail Confirmation, LOI (Letter of Intent), and Other Documents.
- Click the **Choose Files** button to upload the selected document. After uploading, the file details will be displayed.
- In the **Action** column, users have the option to delete attachments if needed, as shown in Fig 3.1.
- User can enter any additional remarks for the FICCI accounts team in the provided remarks section. This step is optional.
- If the user wishes to save the invoice as a draft, uploading an attachment is optional. Click **Save as Draft** to save your progress and return to it later.
- If the user is ready to submit the invoice, uploading at least one attachment is mandatory. Click **Submit** to send the invoice for approval to the Team Leader.

4.2 Sales Invoice Status

FICCI SALES INVOICE MANAGEMENT SYSTEM

Chandan Arora
Employee

Dashboard

Sales Invoice
Create Sales Invoice
Sales Invoice Status





Sales Credit Note
Create Sales Credit Note
Sales Credit Note Status

Customer
Create Customer
Customer Status

Manual
Employee Manual

Sales Invoice Status

Show: 10 Select Date: ALL From: dd-mm-yyyy To: dd-mm-yyyy **Reset** **Submit** **X** Search here

#	Action	Invoice Type	PI No.	Tax Invoice No.	Invoice Amount	Customer Name	Status	Department	Project Code	Proj
1	   	Proforma Invoice	91218993		3,540.00	Team Computers Private Limited	DRAFT	Computers	GENERAL 7-COMP	Com

Showing 10 out of 1 entries

« Prev 1 Next »

Figure 4: Sales Invoice Status

- The Sales Invoice Status page allows users to filter, search, and manage their invoices effectively.
- Click on the dropdown menu next to Date and select a predefined date range such as ALL, Today, Yesterday, Last 7 Days, and Last 30 Days.
- Use the FROM and TO calendar tabs to select a custom date range. After selecting the date range and user, click the **Submit** button to apply the filters.
- The filtered list will display customer details for both Proforma Invoices and Tax Invoices.
- Use the **Search Here** section to find a customer by entering various details such as customer name, invoice number, etc. (excluding the Record No.).
- To adjust the number of records displayed, click on the **Show** dropdown menu and select the desired number (up to a maximum of 100 records).
- To navigate to the next or previous page, use the buttons located at the bottom right corner of the page.
- In the Action Section user can View, Edit, Download, and Delete.

4.3 Convert Proforma to Tax Invoice

Users can convert Proforma Invoice to Tax Invoice once the proforma invoice is processed by the Accounts department. This does not require TL approval as the proforma Invoice was already approved by TL.

Steps to Follow:

Go to Dashboard ---> Proforma Invoice --- > PI Process (Account) --- > click on View icon

At the bottom user will find **Convert** to Invoice.

The screenshot displays a web application interface for processing a Proforma Invoice. At the top, there is a header bar with various data points: 1, ADVERTISEMENT, Test, 10, 12, 120, SER-05, 998363, and 0. Below this is an 'Attachment' section containing a table with columns: #, Category, File Type, File Name, and Action. The table has one row with the following data: 1, Email-confirmation, .pdf, 7CN_MAY24_0016.pdf, and a download icon. Below the attachment table is another table with columns: #, File Type, Invoice No., and Action. The main body of the form contains several text input fields for remarks: 'Remarks for FICCI Accounts Team' (containing 'ok'), 'TL Remarks' (containing 'okay'), 'Accounts Remarks' (containing 'ok'), and a general 'Remarks' field. At the bottom of the form, there are two buttons: 'Cancel Request' (green) and 'Request Tax Invoice' (blue). These two buttons are enclosed in a red rectangular box, indicating the 'Convert' action mentioned in the text.

#	Category	File Type	File Name	Action
1	Email-confirmation	.pdf	7CN_MAY24_0016.pdf	

#	File Type	Invoice No.	Action
---	-----------	-------------	--------

Remarks for FICCI Accounts Team

ok

TL Remarks

okay

Accounts Remarks

ok

Remarks *

Figure 5: Convert Proforma to Tax Invoice

5. Sales Credit Note

5.1 Create Sales Credits Note

To reverse or cancel any Posted Tax Invoice, the User needs to create a Credit Sales Note request.

Credit Sales Note will need TL approval with the refund or without refund.

Credit Sales Note will need TL and CH approval if the refund amount is more than INR 50000.

The screenshot displays the 'New Sales Credit Note' form within the FICCI Sales Invoice Management System. The interface includes a sidebar with navigation options like Dashboard, Sales Invoice, Sales Credit Note, Customer, and Manual. The main form area is divided into several sections: 'Posted Invoice No.' with a dropdown, 'Credit Note Memo Type' with a dropdown, 'Credit Note Amount' with a text input, 'Refund Status' with a dropdown, 'Cancel Reason' with a dropdown, 'Project Code' with a text input, 'Project Name' with a text input, 'Department' with a dropdown, 'PAN No.' with a text input, 'GST No.' with a text input, 'Customer Details' with fields for Customer Name, Customer No, GST Number, Address, City, and Pincode, 'Credit Note Line' with an upload button for attachments, and 'Attachment' with a dropdown. At the bottom, there is a 'Cancel Remarks' text area and two buttons: 'Save as Draft' and 'Submit', which are highlighted with a red rectangle.

Figure 6: Create a Sales Credit note

- In Sales Credit Note, for **New Sales Credit Note**, the User has to Select Posted Invoice No and from Credit Note Memo Type, the User can select **Partial or Full** reversal. In the case of Partial user needs to provide the required credit note amount. In Refund Status user needs to select the option from with refund or without refund.
- And the remaining grey section will be filled automatically with the details from the selected invoice.
- Click on Select Option to choose the Cancel Reason and available options are Duplicate, Data Entry Mistake, Service not availed, Amount Credited by Mistake, and Change in Invoice Date.
- In the Credit Note Line, to upload supporting documents.

- Click the **Choose files** button to upload the selected document. After uploading, the file details will be displayed, allowing the user to confirm the correct files have been uploaded.
- Provide mandatory cancel remarks in the designated field. This is required to give context and reason for the credit note.
- Click **Save as Draft** if you need more time or want to review later.
- Click **Submit** once all details are accurate and attachments are uploaded and send the invoice for approval to the Team Leader.

5.2 Sales Credits Note Status

The screenshot displays the 'Sales Credit Note Status' page within the FICCI Sales Invoice Management System. The interface includes a sidebar with navigation links: Dashboard, Sales Invoice (with sub-links 'Create Sales Invoice' and 'Sales Invoice Status'), Sales Credit Note (with sub-links 'Create Sales Credit Note' and 'Sales Credit Note Status'), Customer (with sub-links 'Create Customer' and 'Customer Status'), and Manual (with sub-link 'Employee Manual'). The main content area features a filter section with 'Show' (set to 10), 'Select Date' (set to ALL), 'From' (dd-mm-yyyy), and 'To' (dd-mm-yyyy) fields. 'Reset' and 'Submit' buttons are present, with the 'Submit' button highlighted by a red box. A search bar labeled 'Search here' is also visible. Below the filters is a table with columns: #, Action, Status, Refund Status, Tax Invoice No., Credit Note No., Posted Credit Note No., Customer Name, Department, Project Code, and Project Name. The table currently displays 'No data found.' and a pagination message 'Showing 10 out of 0 entries.' at the bottom.

Figure 7: Sales Credit Note Status

- On the Sales Credit Note Status page, users can track the status of their sales credit notes and perform various actions.
- Users can filter sales credit notes by date using the provided options. After selecting the desired date range, users can click on the **Submit** button to apply the filter. Users can reset the filters by clicking the **Reset** button if needed.
- Utilize the **Search Here** section to find a customer by entering various details such as customer name, invoice number, etc. (excluding the Record No.).
- Users can choose the number of records displayed per page by clicking on the dropdown menu in the **Show** option. The maximum number of records per page is 100.
- To move to the next or previous page of records, users can use the navigation buttons located in the bottom right corner of the page.
- In the Action section, users can view or delete sales credit notes.

6. Customer

6.1 Add New Customer

FICCI SALES INVOICE MANAGEMENT SYSTEM

Chandan Arora
Employee

Add New Customer

Customer Name
Name
Name 2

Address
Address
Address 2

Country/Region Code
Select

State
Select

City
Select

Post Code
Pincode

E-Mail
email

Primary Contact No.
Primary Contact No.

Contact Person
Contact

GST Customer Type
Select

P.A.N. No.
P.A.N. No.

GST Registration No.
GST Registration No.

Remarks

Save as Draft Submit

Figure 8: Create Customer

- The user has to fill in all the mandatory details required to **Add a new customer**.
- If the user tries to add a customer name that already exists, a pop-up message (*Customers with the same PAN Number and different GST Number already exist OR same GST Number*) will appear on the screen. Users can still create a customer with a different address.
- If the City Pin is not available then the user can contact the FICCI accounts team.
- 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 the FICCI Accounts department for approval.

6.2 Customer Status

FICCI SALES INVOICE MANAGEMENT SYSTEM

Chandan Arora
Employee

Customer Status

Show: 10 Select Date: ALL From: dd-mm-yyyy To: dd-mm-yyyy **Reset** **Submit** Search here

#	Record No.	Customer Code	Name	Address	City	Contact	GST No.	PAN No.	Created On	Created
1	CUST-2425-000061		Munner	delhi	New Delh	9988776655	07AADFC3339T1ZR	AADFC3339T	May 15, 2024, 10:17:41 AM	chandan
2	CUST-2425-000060		Sunil	Mumbai	Mumbai	9988776655	27AADFC3339T1ZR	AADFC3339T	May 15, 2024, 10:08:28 AM	chandan
3	CUST-2425-000059		Ficci	New delhi	New Delh	9877665544	07AADFC3339T1ZR	AADFC3339T	May 15, 2024, 9:56:37 AM	chandan
4	CUST-2425-000058		Test Inv3	Add23	New Delhi	9876543210	07CSFAT0187B8Z7	CSFAT0187B	May 13, 2024, 10:58:48 PM	chandan
5	CUST-2425-000057		Test Inv3	Add23	New Delhi	9876543210	07CSFAT0187B8Z7	CSFAT0187B	May 13, 2024, 10:53:36 PM	chandan
6	CUST-2425-000055		Test	Ficci	New Delhi	9876543210	07BAALI569O4Z2	BAALI569O	May 13, 2024, 9:58:23 PM	chandan
7	CUST-2425-000054		Test Invoice2	Ficci	New Delhi	9876543210	07ZGPPD9319Z6Z2	ZGPPD9319Z	May 13, 2024, 5:42:40 PM	chandan
8	CUST-2425-000053	C33416	Kisahn	dif	New Delhi	9409474826	07GXJPM9885F4Z2	gxjpm9885f	May 8, 2024, 3:14:50 PM	chandan
9	CUST-2425-000052	C33420	Demo 05	address	Bareilly	8273428745		ERTY5643M	May 8, 2024, 3:14:34 PM	chandan
10	CUST-2425-000051	C33416	Rakesh	new delhi	New Delhi	9409474826	07GXJPM9885F4Z2	gxjpm9885f	May 8, 2024, 2:30:56 PM	chandan

Figure 9: Customer Status

- On the **Customer Status** page, users can view customer details, search for specific customers, and navigate through records with date filters and pagination options.
- Users can filter customer status by date using the provided options. After selecting the desired date range, users can click on the **Submit** button to apply the filter. Users can reset the filters by clicking the **Reset** button if needed.

LOGIN FOR APPROVER

7. Dashboard (TL)

The Approver Dashboard is divided into four subsections, you can see the status by clicking on that tab.

- Tax Invoice
- Proforma Invoice
- Sales Credit Note
- Customer

TL can go to **FOR APPROVAL BUCKET** to see all the Tax Invoices, Proforma Invoices, and Sales Credit Note Invoices to either approve or reject the request.

FICCI SALES INVOICE MANAGEMENT SYSTEM

Hemant Seth Approver

Dashboard

Tax Invoice **Proforma Invoice** Sales Credit Note Customer

DRAFT 0 FOR APPROVAL 1 ENDING WITH ACCOUNTS 0 REJECTED 1 CANCELLED 0 PI PROCESSED (ACCOUNTS) 0 ALL 2

Show: 10 Select Date: ALL From: dd-mm-yyyy To: dd-mm-yyyy Reset Submit

#	Action	Invoice Type	PI No.	Invoice Amount	Customer Name	Status	Department	Project Code	Project
1		Proforma Invoice	SI219099	1,180.00	Team Computers Private Limited	PENDING WITH TL APPROVER	Water	100239008	13th lwc

Showing 10 out of 1 entries

Prev 1 Next

Figure 10: Dashboard (Proforma Invoice)

7.1 Approve Sales Invoice

- By Clicking on the View Icon under the Action, the Sales Invoice Approval request will open with all the details. Where the user will get the option to **Approve** or **Reject** the pending request as shown in Figure 11.

Proforma Invoice (sales Invoice Approver Inbox)

State: Delhi, City: New Delhi, Pincode: 110066

Contact Person: Chandan, Customer Emailid (To Send Invoice): chandan.arora@ficcil.com, Phone No.: 9818466097

Total Base Amount: 1000, Total GST Amount: 180, Net Total: 1180

#	Nature of Expense	Description	Quantity	Direct Unit Cost *(Exclusive GST)	Line Amount	GST Group Code	HSN/SAC Code	IGST Amount	CGST Amount	SGST Amount
1	DELEGATION FEE	For Testing Only	1	1000	1000	SER-18	999996	0	90	90

#	Category	File Type	File Name	Action
1	PO	pdf	water1.pdf	
2	PO	pdf	water1.pdf	

Remarks for FICCI Accounts Team: Only for testing

Remarks:

Reject Approve

Figure 11: Proforma Invoice (sales Invoice Approver Inbox)

In the case of Tax Invoice under the Action section, users can View, download, and find payment information by clicking on the buttons as shown in Fig 12.

FICCI SALES INVOICE MANAGEMENT SYSTEM

Hemant Seth Approver

Dashboard

Tax Invoice Proforma Invoice Sales Credit Note Customer

DRAFT 0 FOR APPROVAL 0 PENDING WITH ACCOUNTS 0 REJECTED 0 CANCELLED 0 POSTED TAX INVOICE 3 ALL 3

Show: 10 Select Date: ALL From: dd-mm-yyyy To: dd-mm-yyyy **Reset Submit** Search here

#	Action	Invoice Type	PI No.	Tax Invoice No.	Invoice Amount	Customer Name	Status	Department	Pro
1		Tax Invoice	SI219074	7TI/MAY24/0829	23,600.00	Indian Farmers Fertiliser Cooperative Limited	POSTED TAX INVOICE	Water	100:
2		Tax Invoice	SI219026	7TI/MAY24/0776	23,600.00	Tata Steel Limited	POSTED TAX INVOICE	Water	100:
3		Tax Invoice	SI219000	7TI/MAY24/0754	23,600.00	Ntpc Limited	POSTED TAX INVOICE	Water	100:

Showing 10 out of 3 entries

Prev 1 Next

Figure 12: Dashboard (Tax Invoice)

- Click on the dropdown to select from the following predefined date ranges: ALL, Today, Yesterday, Last 7 Days, Last 30 Days.
- If the user prefers to set a custom date range, use the FROM and TO calendar tabs. Click on the FROM tab to select the start date from the calendar. Click on the "TO" tab to select the end date from the calendar.
- After selecting the desired date range, click on the **SUBMIT** button to apply the filter.
- To clear the date filters and view all records again, click on the **RESET** button.
- Use the **Search Here** section to find a customer by entering various details such as customer name, invoice number, Invoice type, Invoice amount, etc.
- In the Action section, users can View, download, and find payment information by clicking on buttons as shown in Fig 12.

7.2 Cancel Proforma Invoice

Users can cancel the proforma invoice once it's processed by the accounts team. This request will go for TL approval.

Steps to Follow:

Go to Dashboard ---> Proforma Invoice --- > PI Process (Account) --- > click on View icon

At the bottom user will find **Cancel** to Invoice.

The screenshot displays a Proforma Invoice form with the following sections:

- Header Fields:** State (Delhi), City (NEW DELHI), Pincode (110023), Contact Person (Mr Kishore Shah), Customer Emailid (gautam@teamcomputers.com), Phone No. (8880009890), Total Base Amount (10000), Total GST Amount (1800), and Net Total (11800).
- Sales Line Table:**

#	Nature of Expense	Description	Quantity	Direct Unit Cost *(Exclusive GST)	Line Amount	GST Group Code	HSN/SAC Code	IGST Amount	CGST Amount	SGST Amount
1	ADVERTISEMENT	Ok	20	500	10000	SER-18	998596	0	900	900
- Attachment Table:**

#	Category	File Type	File Name	Action
1	PO	.xlsx	202404161451197686.xlsx	Download
2	PO	.xlsx	202404161451197686.xlsx	Download
- Remarks:**
 - Remarks for FICCI Accounts Team: ok
 - TL Remarks: On Approve By TL
 - Remarks: (Empty field)
- Action:** A green button labeled "Cancel Request" is highlighted with a red box at the bottom left of the form.

Figure 13: Cancel Proforma Invoice

8. Sales Invoice Approver

8.1 Sales Invoice Approval Inbox

FICCI SALES INVOICE MANAGEMENT SYSTEM

Hemant Seth Approver

Sales Invoice Approval Inbox

Show: 10 Select Date: All From: dd-mm-yyyy To: dd-mm-yyyy **Reset** **Submit** Search here

#	Action	Invoice Type	PI No.	Tax Invoice No.	Invoice Amount	Customer Name	Status	Department	Project Code	Project Name
1		Proforma Invoice	SI219099		1,180.00	Team Computers Private Limited	PENDING WITH TL APPROVER	Water	100239008	13th Iwa Interna
2		Tax Invoice	SI219074		23,600.00	Indian Farmers Fertiliser Cooperative Limited	POSTED TAX INVOICE	Water	100239010	Water Awards #
3		Tax Invoice	SI219026		23,600.00	Tata Steel Limited	POSTED TAX INVOICE	Water	100239010	Water Awards #
4		Tax Invoice	SI219000		23,600.00	Ntpc Limited	POSTED TAX INVOICE	Water	100239010	Water Awards #

Showing 10 out of 4 entries Prev 1 Next

Figure 14: Sales Invoice Approval Inbox

- On the Sales Invoice approval page, users can track the status and perform various actions.
- Users can filter sales credit notes by date using the provided options. After selecting the desired date range, users can click on the **Submit** button to apply the filter. Users can reset the filters by clicking the **Reset** button if needed.
- Utilize the **Search Here** section to find a customer by entering various details such as customer name, invoice number, etc.
- Users can choose the number of records displayed per page by clicking on the dropdown menu in the **Show** option. The maximum number of records per page is 100.
- To move to the next or previous page of records, users can use the navigation buttons located in the bottom right corner of the page.
- In the Action section, users only can view sales invoice approval.

9. Sales Credit Note

9.1 Approval Inbox

The screenshot shows the 'Sales Credit Note Approval Inbox' page in the FICCI Sales Invoice Management System. The interface includes a sidebar with navigation options: Dashboard, Sales Invoice (Create Sales Invoice, Sales Invoice Status, Sales Invoice Approval Inbox), Sales Credit Note (Create Sales Credit Note, Sales Credit Note Status, Approval Inbox), Customer (Create Customer, Customer Status), and Manual (Employee Manual, Approver Manual). The 'Approval Inbox' link is highlighted with a red box. The main content area features a title 'Sales Credit Note Approval Inbox', a 'Show' dropdown set to '10', a 'Select Date' dropdown set to 'ALL', and date range fields 'From' and 'To' with a date format 'dd-mm-yyyy'. There are 'Reset' and 'Submit' buttons. A search bar with a magnifying glass icon and the text 'Search here' is also present. Below these controls is a table with columns: #, Action, Status, Refund Status, Tax Invoice No., Credit Note No., Posted Credit Note No., Customer Name, Department, Project Code, Project Name, Invoice Amount, and Credit Note Amount. The table currently displays 'No data found.' and a message 'Showing 10 out of 0 entries'.

Figure 15: Approval Inbox

- On the Sales Credit Note Approval Inbox page, users can find the approval inbox.
- Choose a date range using the From and To fields, then click Reset or Submit to filter results.
- Search for Customer: Enter customer details (excluding Record No.) in the Search Here section to find specific records.
- Use the **Show** dropdown to view up to 100 records per page.
- Click the navigation buttons in the bottom right corner to move between pages.
- Use the slide bar in the Action section to view the approval status by the approver.

Thank You