

APPROVER USER MANUAL

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

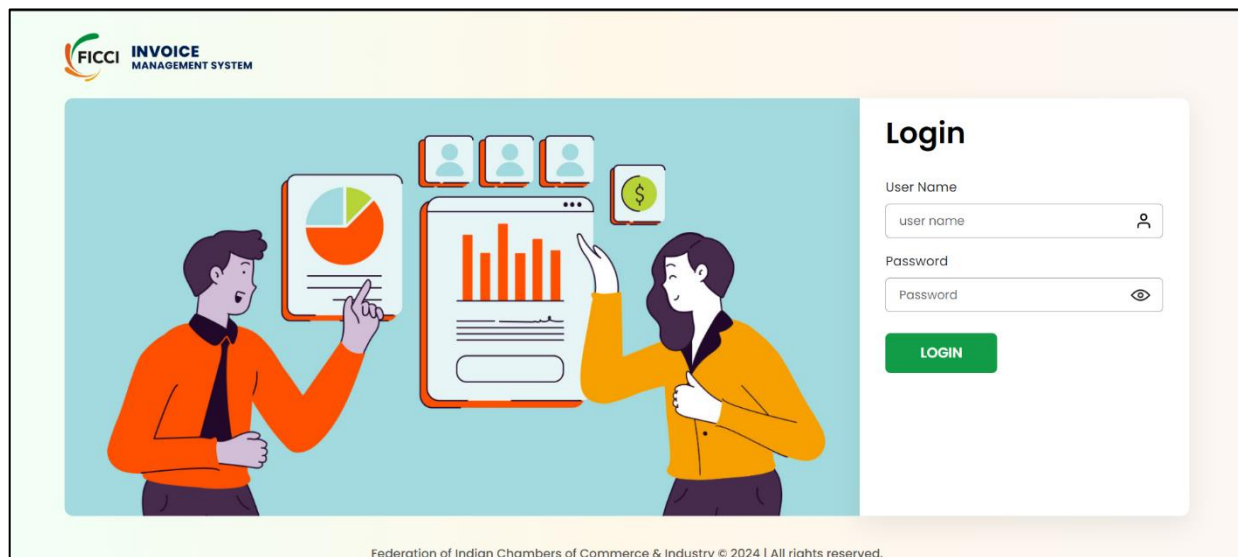


Login Page

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

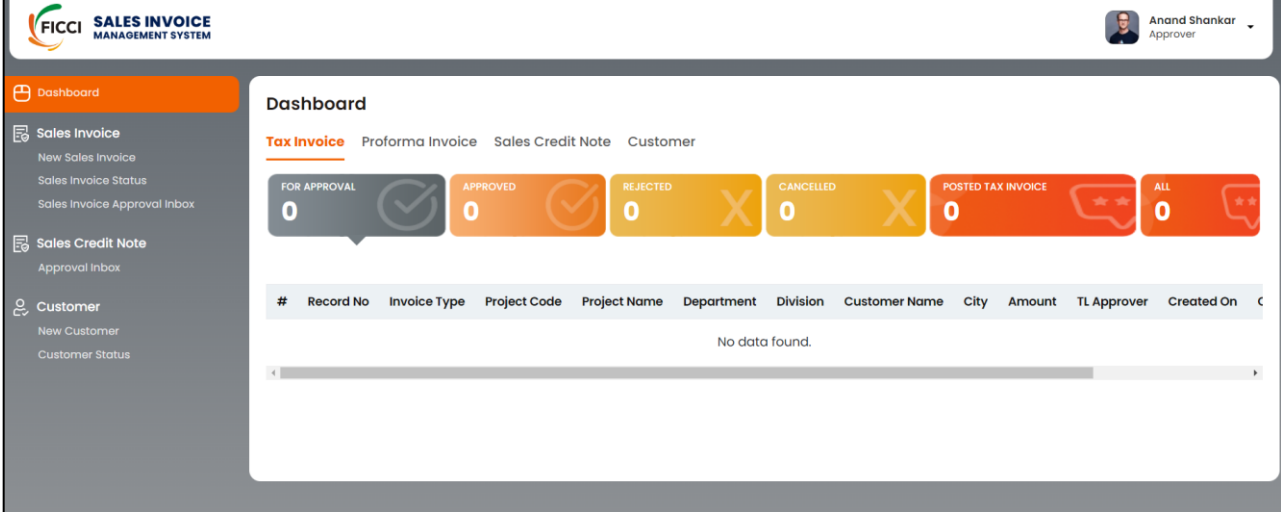
URL is <http://siportal.myassociates.org/login>

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 screenshot displays the FICCI Sales Invoice Management System Dashboard. The interface includes a top header with the FICCI logo and the text "SALES INVOICE MANAGEMENT SYSTEM". On the right of the header, the user's name "Anand Shankar" and role "Approver" are shown. A left sidebar contains navigation links: "Dashboard", "Sales Invoice" (with sub-links "New Sales Invoice", "Sales Invoice Status", and "Sales Invoice Approval Inbox"), "Sales Credit Note" (with sub-link "Approval Inbox"), and "Customer" (with sub-links "New Customer" and "Customer Status"). The main content area is titled "Dashboard" and features tabs for "Tax Invoice", "Proforma Invoice", "Sales Credit Note", and "Customer". Below the tabs, there are six status cards: "FOR APPROVAL" (0), "APPROVED" (0), "REJECTED" (0), "CANCELLED" (0), "POSTED TAX INVOICE" (0), and "ALL" (0). Each card has a corresponding icon (checkmark or X). Below these cards is a table with columns: "#", "Record No", "Invoice Type", "Project Code", "Project Name", "Department", "Division", "Customer Name", "City", "Amount", "TL Approver", and "Created On". The table currently displays "No data found." and has a horizontal scrollbar.

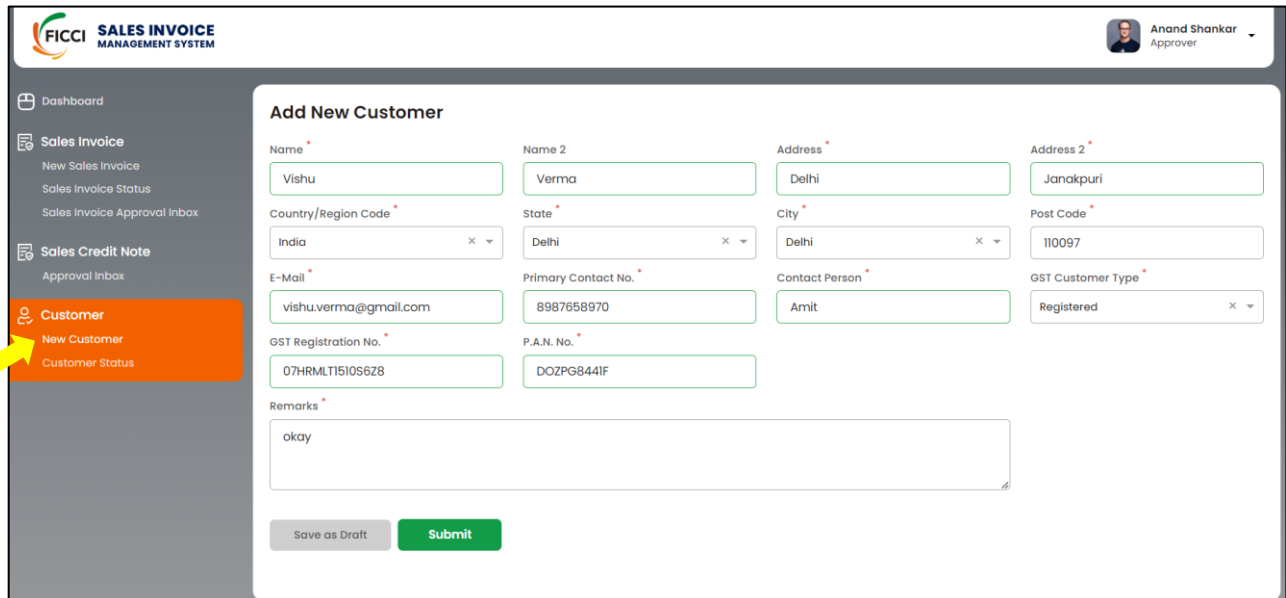
The user will be logged in successfully and will be redirected to the Dashboard where the user will be able to see the page with the description as shown in the above image.

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. New Customer

A. Add New Customer



FICCI SALES INVOICE MANAGEMENT SYSTEM

Anand Shankar Approver

Add New Customer

Name *	Name 2 *	Address *	Address 2 *
<input type="text" value="Vishu"/>	<input type="text" value="Verma"/>	<input type="text" value="Delhi"/>	<input type="text" value="Janakpuri"/>
Country/Region Code *	State *	City *	Post Code *
<input type="text" value="India"/>	<input type="text" value="Delhi"/>	<input type="text" value="Delhi"/>	<input type="text" value="110097"/>
E-Mail *	Primary Contact No. *	Contact Person *	GST Customer Type *
<input type="text" value="vishu.verma@gmail.com"/>	<input type="text" value="8987658970"/>	<input type="text" value="Amit"/>	<input type="text" value="Registered"/>
GST Registration No. *	P.A.N. No. *		
<input type="text" value="07HRMLT510S6Z8"/>	<input type="text" value="DOZPG844IF"/>		
Remarks *			
<input type="text" value="okay"/>			

- 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

FICCI SALES INVOICE MANAGEMENT SYSTEM

Anand Shankar Approver

Dashboard

Sales Invoice

- New Sales Invoice
- Sales Invoice Status
- Sales Invoice Approval Inbox

Sales Credit Note

- Approval Inbox

Customer

- New Customer
- Customer Status

Customer Status

Show 10

Search here

#	Record No.	Customer Code	Name	Address	City	Contact	GST No	PAN No	Created On	Cre
1	CUST-2425-000002		Harsh	Delhi	Delhi	8789009389		DOZPG844ID	Apr 17, 2024, 12:27:34 PM	ana
2	CUST-2425-000001		Manish	Gurgaon	Delhi	8799012980	07JLKFJ9167U5Z5	DOZPG844ID	Apr 17, 2024, 12:23:03 PM	cha

Showing 10 out of 2 entries

Prev 1 Next

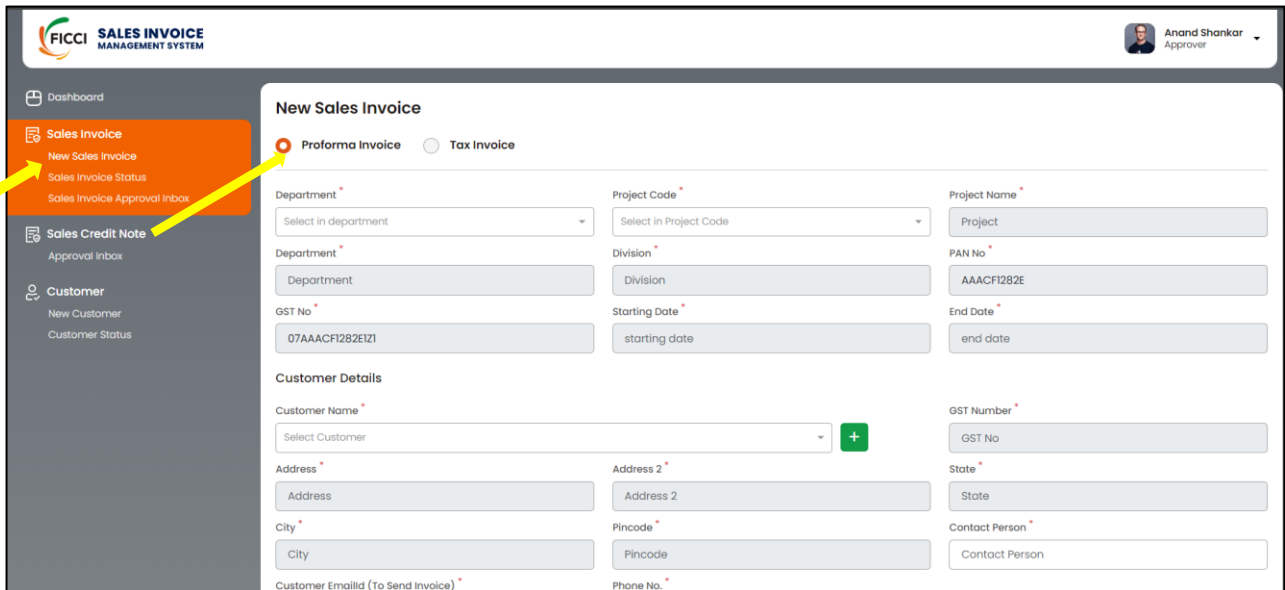
- On the Customer Status page, the User can find the customer details.
- Users can search for a customer in the "Search here" section by entering various details, except the Record No.
- The user can view up to a maximum of 100 records by clicking on the dropdown in the show option.
- To navigate to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

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.

A. Proforma Invoice



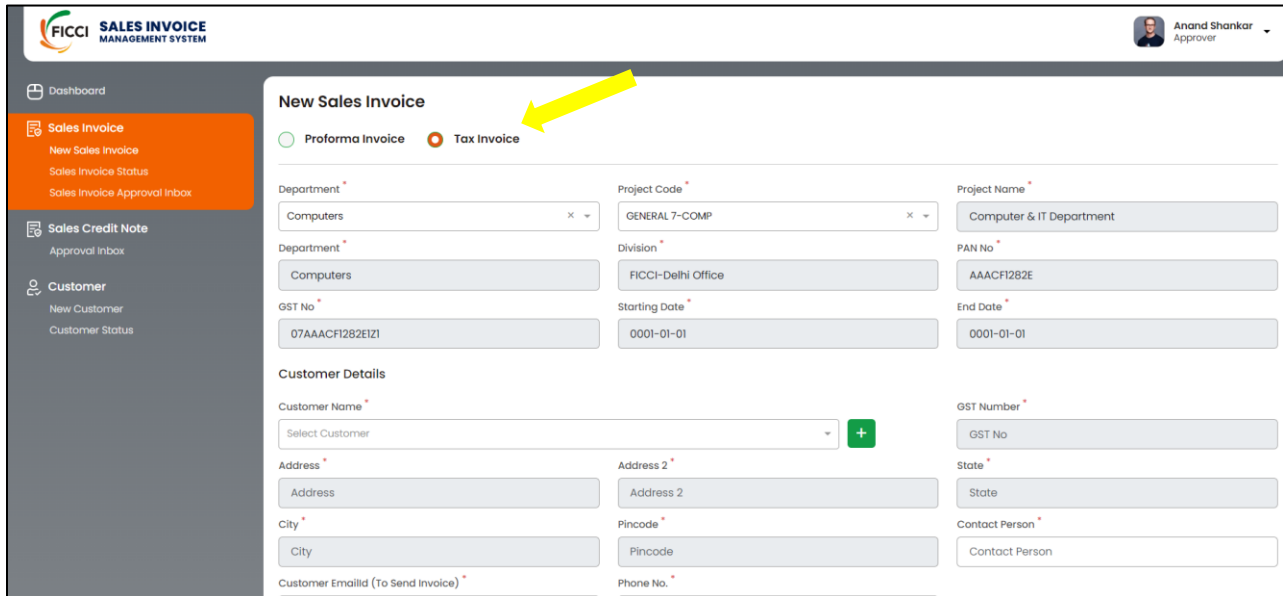
The screenshot displays the 'New Sales Invoice' page in the FICCI Sales Invoice Management System. The interface features a sidebar on the left with navigation options: Dashboard, Sales Invoice (highlighted with a yellow arrow), Sales Credit Note, and Customer. The main content area shows the 'New Sales Invoice' form with two tabs: 'Proforma Invoice' (selected, indicated by a red dot and a yellow arrow) and 'Tax Invoice'. The form includes several input fields and dropdown menus for customer and project information, such as Department, Project Code, Project Name, Division, PAN No, GST No, Starting Date, End Date, Customer Name, Address, City, Pincode, and Contact Person. A green plus button is visible next to the Customer Name dropdown.

- 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 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.

City	Pincode	Contact Person
<input type="text"/>	<input type="text"/>	<input type="text"/>
Customer Emailid (To Send Invoice) *	Phone No. *	
<input type="text"/>	<input type="text"/>	
Sales Line		
Nature of Income *	Quantity *	GST Group Code *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Direct Unit Cost * (Exclusive GST)	Description/Narration to Print on Invoice *	Add Line
<input type="text"/>	<input type="text"/>	
Total Base Amount	Total GST Amount	Total Invoice Amount (Incl.GST)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Upload Attachments (PO,E-Mail Confirmation,LOI,Other Documents) *(Max File Size 5 MB only)		
Attachment	Upload Document	
<input type="text"/>	<input type="text"/>	<input type="text"/>
Remarks for FICCI Accounts Team		
<input type="text"/>		
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.
- 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.

B. TAX Invoice



The screenshot displays the 'FICCI SALES INVOICE MANAGEMENT SYSTEM' interface. The left sidebar contains navigation links: Dashboard, Sales Invoice (highlighted in orange), Sales Credit Note, and Customer. The 'Sales Invoice' section includes links for New Sales Invoice, Sales Invoice Status, and Sales Invoice Approval Inbox. The main content area is titled 'New Sales Invoice' and features two radio buttons: 'Proforma Invoice' (unselected) and 'Tax Invoice' (selected, indicated by a yellow arrow). The form is divided into several sections: Department (Computers), Project Code (GENERAL 7-COMP), Project Name (Computer & IT Department), Division (FICCI-Delhi Office), PAN No (AAACF1282E), GST No (07AAACF1282E1Z1), Starting Date (0001-01-01), and End Date (0001-01-01). The 'Customer Details' section includes a dropdown for Customer Name (Select Customer) with a green plus (+) button, Address, Address 2, City, Pincode, State, and Contact Person. The bottom section includes Customer Emailid (To Send Invoice) and Phone No.

- 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 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.

City <input type="text" value="City"/>	Pincode <input type="text" value="Pincode"/>	Contact Person <input type="text" value="Contact Person"/>
Customer Emailid (To Send Invoice) * <input type="text" value="Email ID"/>	Phone No. * <input type="text" value="Phone No"/>	
Sales Line		
Nature of Income * <input type="text" value="Select"/>	Quantity * <input type="text" value="Quantity"/>	GST Group Code * <input type="text" value="Select"/>
Direct Unit Cost * (Exclusive GST) <input type="text" value="Direct Unit Cost"/>	Description/Narration to Print on Invoice * <input type="text" value="Description"/>	Add Line
Total Base Amount <input type="text" value="Total Base Amount"/>	Total GST Amount <input type="text" value="Total GST Amount"/>	Total Invoice Amount (Incl.GST) <input type="text" value="Total Invoice Amount (Incl.GST)"/>
Upload Attachments (PO,E-Mail Confirmation,LOI,Other Documents) * (Max File Size 5 MB only)		
Attachment <input type="text" value="Select"/>	Upload Document <input type="text" value="Choose files"/> <input type="text" value="No file chosen"/>	Upload
Remarks for FICCI Accounts Team <input type="text"/>		
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.

2. Sales Invoice Status

FICCI SALES INVOICE MANAGEMENT SYSTEM

Anand Shankar Approver

Dashboard

Sales Invoice

- New Sales Invoice
- Sales Invoice Status
- Sales Invoice Approval Inbox

Sales Credit Note

- Approval Inbox

Customer

- New Customer
- Customer Status

Sales Invoice Status

Show 10

Search here

#	Record No.	Invoice Type	PI No	Project Code	Project Name	Department	Division	Vendor Name
1	PI-2425-000004	Tax Invoice	SI215070	GENERAL 7-COMP	Computer & It Department	Computers	Ficci-delhi Office	Housing & Urban D
2	PI-2425-000003	Proforma Invoice	SI215069	GENERAL 7-COMP	Computer & It Department	Computers	Ficci-delhi Office	Stryker Global Tect
3	PI-2425-000002	Tax Invoice	SI215068	GENERAL 7-COMP	Computer & It Department	Computers	Ficci-delhi Office	Balrampur Chini M
4	PI-2425-000001	Tax Invoice	SI215067	GENERAL 7-COMP	Computer & It Department	Computers	Ficci-delhi Office	Balrampur Chini M

Showing 10 out of 4 entries

« Prev 1 Next »

- 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 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.

3. Sales Invoice Approval Inbox

Sales Invoice Approval Inbox

Show

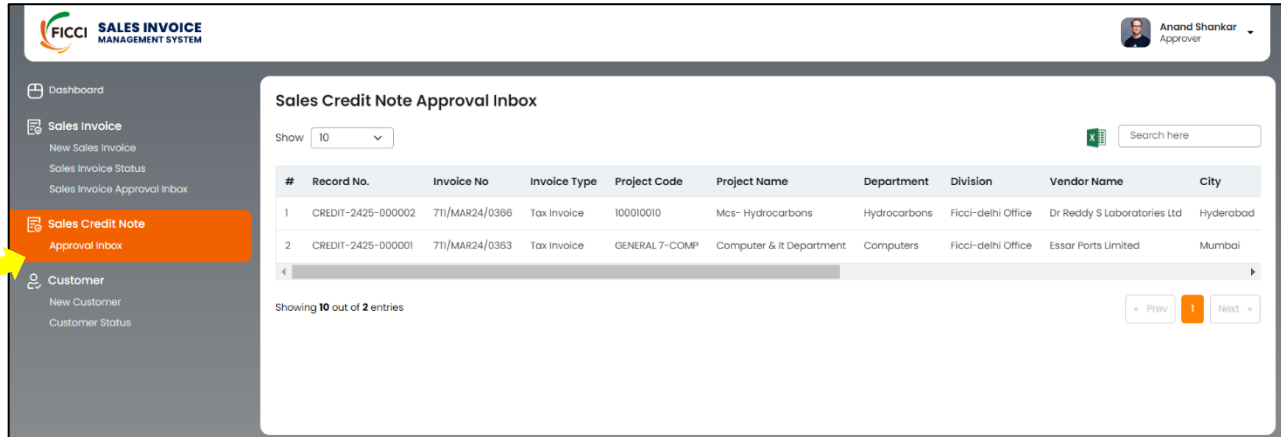
#	Record No.	Invoice Type	Project Code	Project Name	Department	Division	Vendor Name
1	PI-2425-000022	Proforma Invoice	GENERAL 7-COMP	Computer & It Department	Computers	Ficci-delhi Office	Balrampur Chini Mills Ltd
2	PI-2425-000020	Tax Invoice	GENERAL 7-COMP	Computer & It Department	Computers	Ficci-delhi Office	Indian Renewable Energy
3	PI-2425-000013	Tax Invoice	GENERAL 7-COMP	Computer & It Department	Computers	Ficci-delhi Office	Dakshin Gujrat Vij Compa
4	PI-2425-000009	Proforma Invoice	GENERAL 7-COMP	Computer & It Department	Computers	Ficci-delhi Office	Dakshin Gujrat Vij Compa
5	PI-2425-000007	Proforma Invoice	GENERAL 7-COMP	Computer & It Department	Computers	Ficci-delhi Office	Dakshin Gujrat Vij Compa
6	PI-2425-000005	Tax Invoice	GENERAL 7-COMP	Computer & It Department	Computers	Ficci-delhi Office	Balrampur Chini Mills Ltd
7	PI-2425-000002	Proforma Invoice	100190127	E-masterclass On Customs, 24-25 Feb 2022	Taxation	Ficci-delhi Office	Dakshin Gujrat Vij Compa
8	PI-2425-000001	Proforma Invoice	GENERAL 7-COMP	Computer & It Department	Computers	Ficci-delhi Office	Gensol Engineering Privati

Showing 10 out of 8 entries

- Users can search for a customer in the "**Search here**" section by entering various details, except Record No.
- The user can view up to 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 that are approved status by the Approver.

Sales Credit Note

1. Sales Invoice Approval Inbox



The screenshot displays the FICCI Sales Invoice Management System interface. The left sidebar contains a navigation menu with the following items: Dashboard, Sales Invoice (with sub-items: New Sales Invoice, Sales Invoice Status, Sales Invoice Approval Inbox), Sales Credit Note (with sub-items: Approval Inbox), and Customer (with sub-items: New Customer, Customer Status). A yellow arrow points to the 'Approval Inbox' link under 'Sales Credit Note'. The main content area is titled 'Sales Credit Note Approval Inbox' and features a search bar labeled 'Search here', a 'Show' dropdown set to '10', and a table with the following data:

#	Record No.	Invoice No	Invoice Type	Project Code	Project Name	Department	Division	Vendor Name	City
1	CREDIT-2425-000002	711/MAR24/0356	Tax Invoice	100010010	Mcs- Hydrocarbons	Hydrocarbons	Ficci-delhi Office	Dr Reddy S Laboratories Ltd	Hyderabad
2	CREDIT-2425-000001	711/MAR24/0353	Tax Invoice	GENERAL 7-COMP	Computer & It Department	Computers	Ficci-delhi Office	Essar Ports Limited	Mumbai

Below the table, it indicates 'Showing 10 out of 2 entries' and includes navigation buttons: '< Prev', '1' (highlighted), and 'Next >'.

- Users can search for a customer in the "**Search here**" section by entering various details, except Record No.
- The user can view up to 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 the status.

Thank You