

# **INVOICE PORTAL USER MANUAL**

**FOR**

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

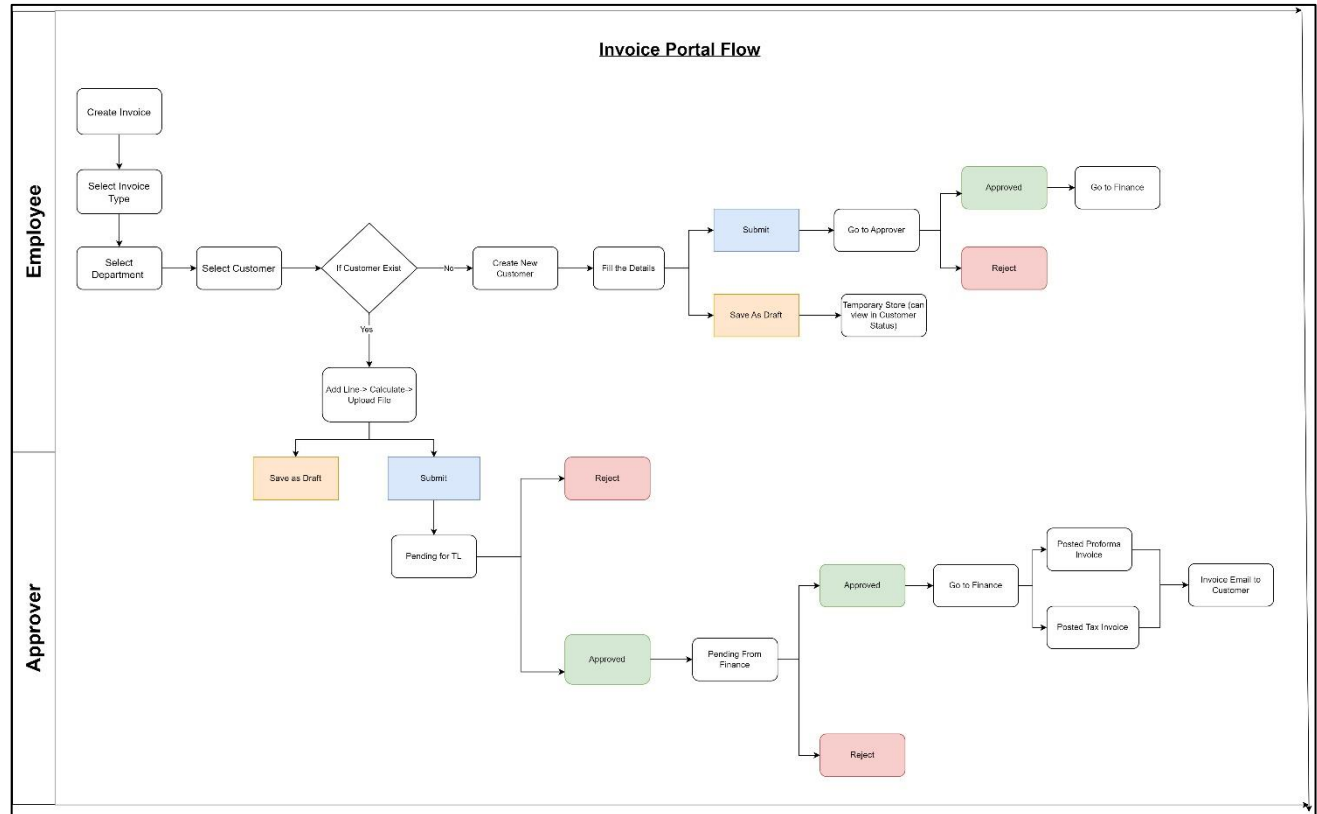


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# 1. Invoice Portal Flow



[Click here to see the diagram](#)

**Please Note:** Because the following graphics appear pixelated due to document sizing, please refer to the above link

## 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

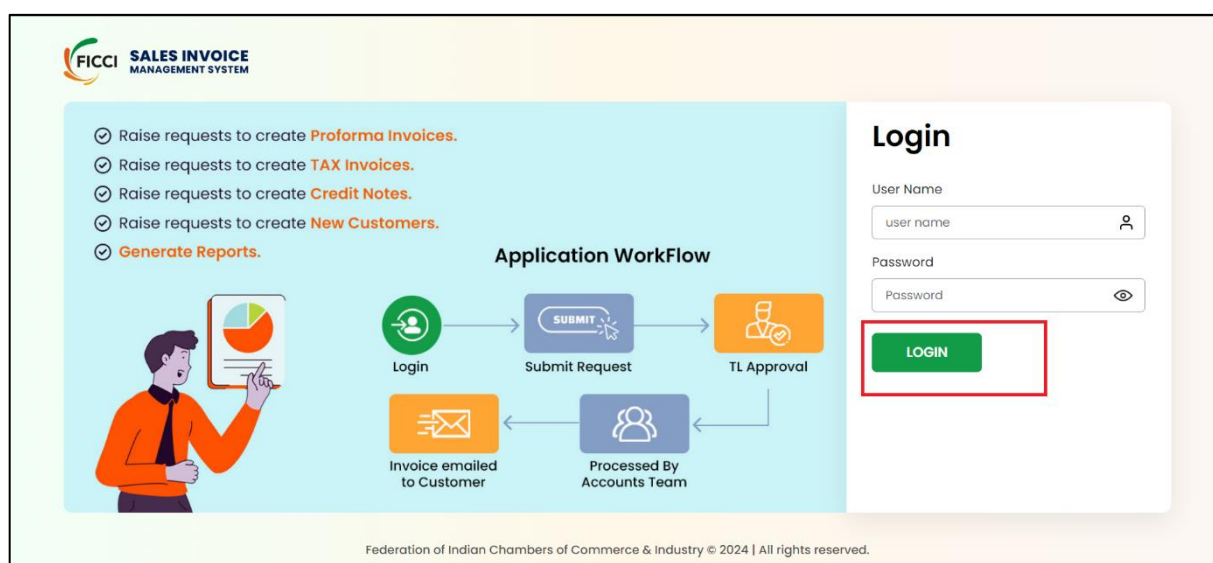


Figure 1: Login Page

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

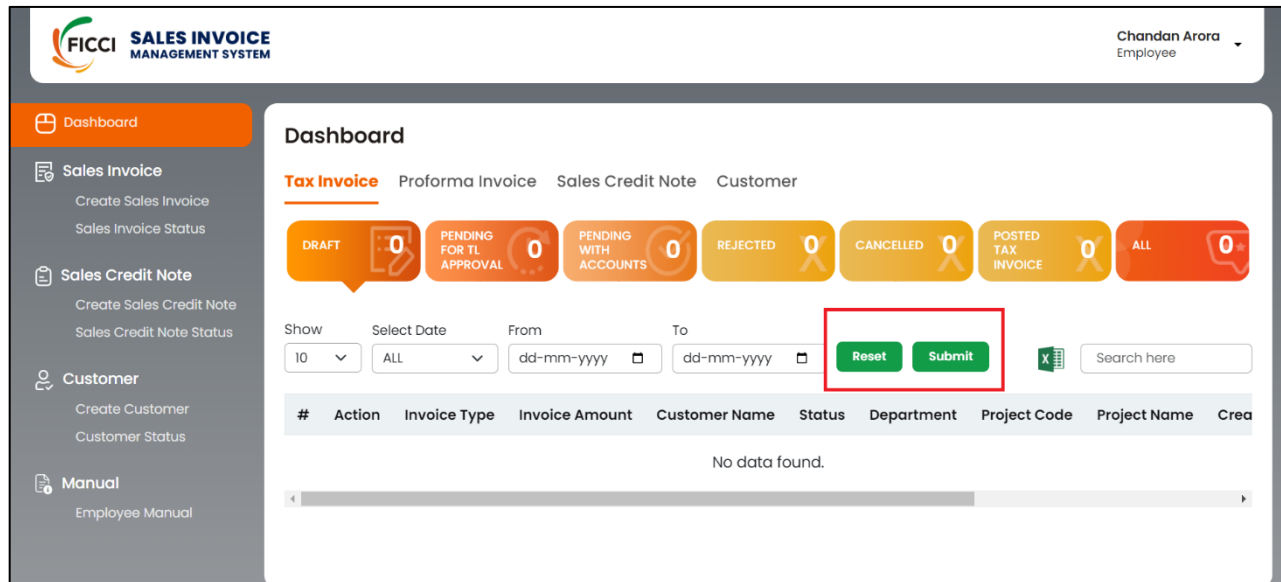


Figure 2: Dashboard

- The Dashboard is divided into four subsections, you can view the status by clicking on the respective 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).

**Request raised for Sales Invoice==>> Request sent for TL Approval==>> Approved Request sent to Accounts Department==>> Accounts Team Processes the request==>> Invoice Emailed to Customer**

***Requests raised by TL will directly go to Accounts Department for processing.***

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

Users can cancel a Proforma Invoice once processed by Accounts Team.

To reverse a Tax Invoice, raise a **Sales Credit Note**.

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' (with 'Create Sales Credit Note' and 'Sales Credit Note Status'), 'Customer' (with 'Create Customer' and 'Customer Status'), and 'Manual' (with 'Employee Manual'). The main content area is titled 'New Sales Invoice' (indicated by a red box). The form contains several sections: 'Invoice Type' with a 'Select Invoice' dropdown; 'Department' with a 'Select in department' dropdown; 'Project Code' with a 'Select in Project Code' dropdown; 'Project Name' with a 'Project' input field; 'Department' with a 'Department' input field; 'FICCI PAN No.' with 'AAACFI282E' input; 'FICCI GST No.' with '07AAACFI282EI2I' input; 'Project Start Date' with 'starting date' input; 'Project End Date' with 'end date' input; 'Customer Details' section with 'Customer Name (Search by Customer Code,GST No.,Name)\*' dropdown (showing 'Select Customer') and a green '+' button; 'GST Number' with 'GST No' input; 'Address' with 'Address' input; 'Address 2' with 'Address 2' input; 'State' with 'State' input; 'City' with 'City' input; 'Pincode' with 'Pincode' input; and 'Customer Contact Person' with 'Contact Person' input.

*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

The screenshot displays the 'Sales Invoice Status' page within the FICCI Sales Invoice Management System. The interface includes a sidebar with navigation options: Dashboard, Sales Invoice (highlighted), Sales Credit Note, Customer, and Manual. The main content area features a filter section with 'Show' (10), 'Select Date' (ALL), 'From' (dd-mm-yyyy), and 'To' (dd-mm-yyyy) fields, along with 'Reset' and 'Submit' buttons. A search bar labeled 'Search here' is also present. Below the filters is a table with columns: #, Action, Invoice Type, PI No., Tax Invoice No., Invoice Amount, Customer Name, Status, Department, Project Code, and Proj. The table contains one entry for a Proforma Invoice with PI No. 91218993, Invoice Amount 3,540.00, and Customer Name Team Computers Private Limited. The status is DRAFT, and the department is Computers. The project code is GENERAL 7-COMP. At the bottom, it shows 'Showing 10 out of 1 entries' and navigation buttons for 'Prev', '1', and 'Next'.




#	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

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, Download, check Payment Status, etc.

### 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 fields: 1, ADVERTISEMENT, Test, 10, 12, 120, SER-05, 998363, and 0. Below this is an 'Attachment' section with a table containing one row: #1, Category: Email-confirmation, File Type: .pdf, File Name: 7CN\_MAY24\_0016.pdf, and an Action icon. Below the attachment table is another table with columns: #, File Type, Invoice No., and Action. The main body of the form contains three text input areas: 'Remarks for FICCI Accounts Team' with the value 'ok', 'TL Remarks' with the value 'okay', and 'Accounts Remarks' with the value 'ok'. At the bottom, there is a 'Remarks' field with a '+' icon. A red rectangular box highlights two buttons at the bottom: 'Cancel Request' (green) and 'Request Tax Invoice' (blue).

*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: 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), and Manual (Employee Manual). The main form area is titled 'New Sales Credit Note' and contains several sections: 'Posted Invoice No.' with a dropdown menu; 'Credit Note Memo Type' with a dropdown menu; 'Credit Note Amount' with a text input field; 'Refund Status' with a dropdown menu; 'Cancel Reason' with a dropdown menu; 'Project Code' with a text input field; 'Project Name' with a text input field; 'Department' with a dropdown menu; 'PAN No.' with a text input field; 'GST No.' with a text input field; 'Customer Details' section including 'Customer Name', 'Customer No.', 'GST Number', 'Address', 'City', and 'Pincode'; 'Credit Note Line' section with a dropdown menu for 'Attachment' and a text input field for 'Cancel Remarks'; and an 'Upload Document' section with a 'Choose files' button and a 'No file chosen' status. At the bottom of the form, there are 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 features a sidebar on the left 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 is titled 'Sales Credit Note Status' and contains a filter section with a 'Show' dropdown set to '10', a 'Select Date' dropdown set to 'ALL', and date range inputs for 'From' and 'To' in 'dd-mm-yyyy' format. A red box highlights the 'Reset' and 'Submit' buttons. To the right of the filters is a search bar labeled 'Search here'. Below the filter section is a table with the following headers: '#', 'Action', 'Status', 'Refund Status', 'Tax Invoice No.', 'Credit Note No.', 'Posted Credit Note No.', 'Customer Name', 'Department', 'Project Code', and 'Project Name'. The table body is empty, displaying 'No data found.' and '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

The screenshot shows the 'Add New Customer' form within the FICCI Sales Invoice Management System. The interface includes a sidebar with navigation options: 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), and Manual (Employee Manual). The 'Create Customer' option is highlighted. The main form area is titled 'Add New Customer' and contains the following fields:

- Customer Name: Name (text input)
- Name 2: Name 2 (text input)
- Address: Address (text input)
- Address 2: Address 2 (text input)
- Country/Region Code: Select (dropdown menu)
- State: Select (dropdown menu)
- City: Select (dropdown menu)
- Post Code: Pincode (text input)
- E-Mail: email (text input)
- Primary Contact No.: Primary Contact No. (text input)
- Contact Person: Contact (text input)
- GST Customer Type: Select (dropdown menu)
- P.A.N. No.: P.A.N. No. (text input)
- GST Registration No.: GST Registration No. (text input)
- Remarks: Remarks (text area)

At the bottom of the form, there are two buttons: 'Save as Draft' and '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		Ficcl	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	Ficcl	New Delhi	9876543210	07BAALI569O4Z2	BAALI569O	May 13, 2024, 9:58:23 PM	chandan
7	CUST-2425-000054		Test Invoice2	Ficcl	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		ERTYY5643M	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 navigation 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 PENDING 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.

The screenshot displays the 'Proforma Invoice (sales Invoice Approver Inbox)' interface. It includes a sidebar with 'Approver Manual' and a main form area. The form contains fields for State (Delhi), City (New Delhi), Pincode (110066), Contact Person (Chandan), Customer Emailid (chandan.arora@ficcil.com), and Phone No. (9818466097). It also shows financial details: Total Base Amount (1000), Total GST Amount (180), and Net Total (1180). Below this is a table with columns: #, Nature of Expense, Description, Quantity, Direct Unit Cost \*(Exclusive GST), Line Amount, GST Group Code, HSN/SAC Code, IGST Amount, CGST Amount, and SGST Amount. The table contains one entry for 'DELEGATION FEE'. Another table below shows attachments with columns: #, Category, File Type, File Name, and Action. It lists two PDF files named 'water1.pdf'. At the bottom, there is a 'Remarks for FICCI Accounts Team' section with the text 'Only for testing' and a 'Remarks' section. At the very bottom, there are 'Reject' and 'Approve' buttons, which are highlighted with a red box.

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.

The screenshot shows the 'FICCI SALES INVOICE MANAGEMENT SYSTEM' dashboard. The user is logged in as 'Hemant Seth' (Approver). The left sidebar contains navigation links for Dashboard, Sales Invoice, Sales Credit Note, Customer, and Manual. The main dashboard area is titled 'Dashboard' and includes tabs for 'Tax Invoice' (selected), 'Proforma Invoice', 'Sales Credit Note', and 'Customer'. Below the tabs are status filters: DRAFT (0), FOR APPROVAL (0), PENDING WITH ACCOUNTS (0), REJECTED (0), CANCELLED (0), POSTED TAX INVOICE (3), and ALL (3). There are search and filter options with 'Reset' and 'Submit' buttons highlighted by a red box. A table lists three tax invoices with columns: #, Action, Invoice Type, PI No., Tax Invoice No., Invoice Amount, Customer Name, Status, Department, and Pro. The first invoice is highlighted with a red box around its action icons (view, download, and a currency symbol). The table shows invoices for 'Indian Farmers Fertiliser Cooperative Limited', 'Tata Steel Limited', and 'Ntpc Limited'. At the bottom, it says 'Showing 10 out of 3 entries' and has pagination controls.

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	<a href="#">Download</a>
2	PO	.xlsx	202404161451197686.xlsx	<a href="#">Download</a>
- 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

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

**Manual**

- Employee Manual
- Approver Manual

**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 left sidebar contains a navigation menu with sections: Dashboard, Sales Invoice (with sub-items: Create Sales Invoice, Sales Invoice Status, Sales Invoice Approval Inbox), Sales Credit Note (with sub-items: Create Sales Credit Note, Sales Credit Note Status, and 'Approval Inbox' which is highlighted with a red box), Customer (with sub-items: Create Customer, Customer Status), and Manual (with sub-items: Employee Manual, Approver Manual). The main content area has a title 'Sales Credit Note Approval Inbox' and a search bar with a 'Search here' button. Below the search bar are filters for 'Show' (set to 10), 'Select Date' (set to ALL), 'From' (dd-mm-yyyy), and 'To' (dd-mm-yyyy), with 'Reset' and 'Submit' buttons. A table header lists 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 body is empty, displaying 'No data found.' and '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