EMPLOYEE USER MANUAL

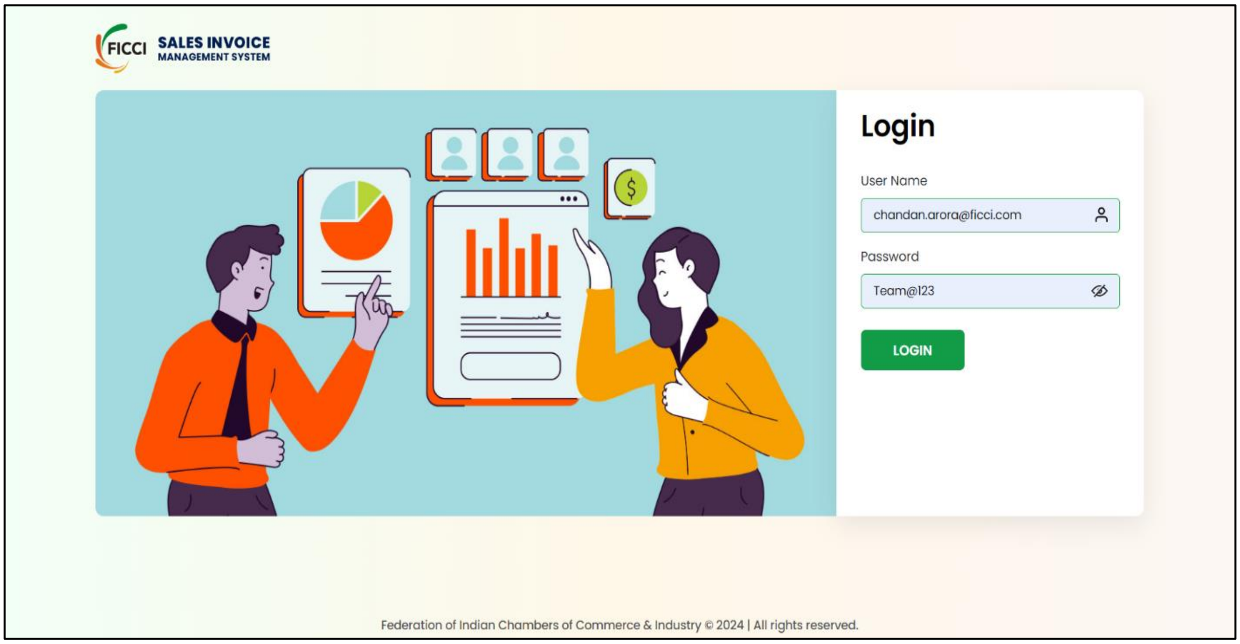
Federation of Indian Chambers of Commerce and Industry, FICCI

Login Page

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

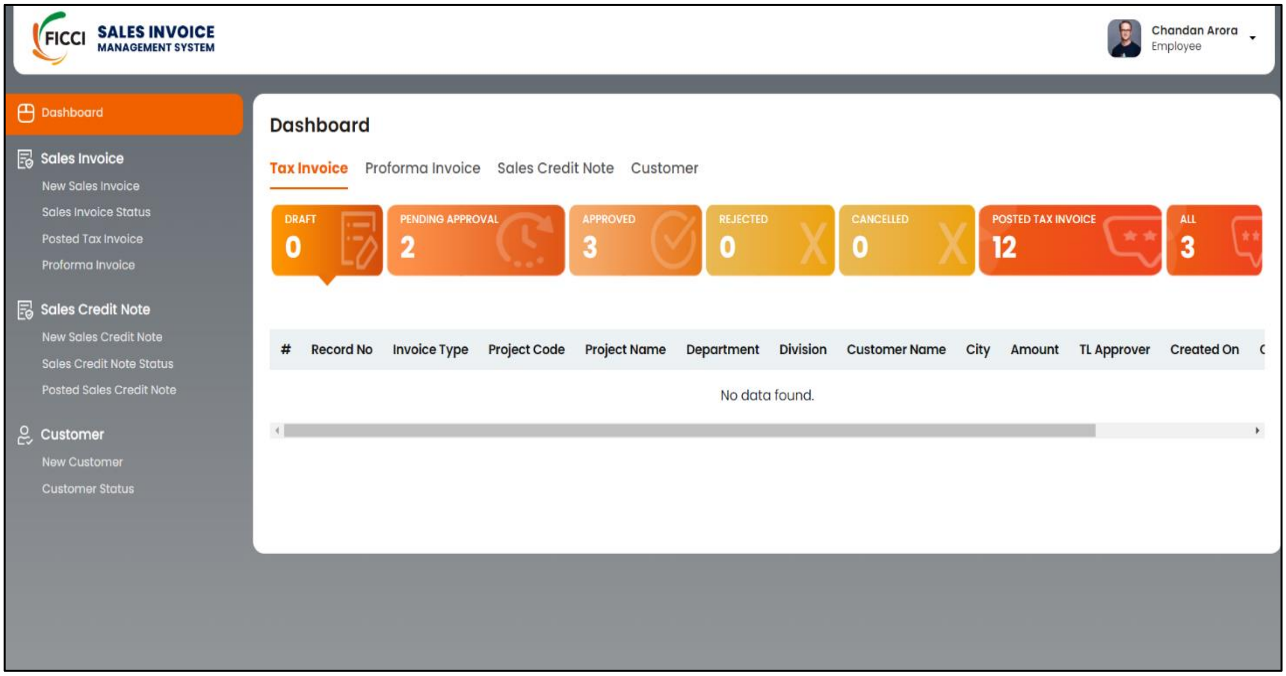
URL is http://siportal.myassociates.org/login

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

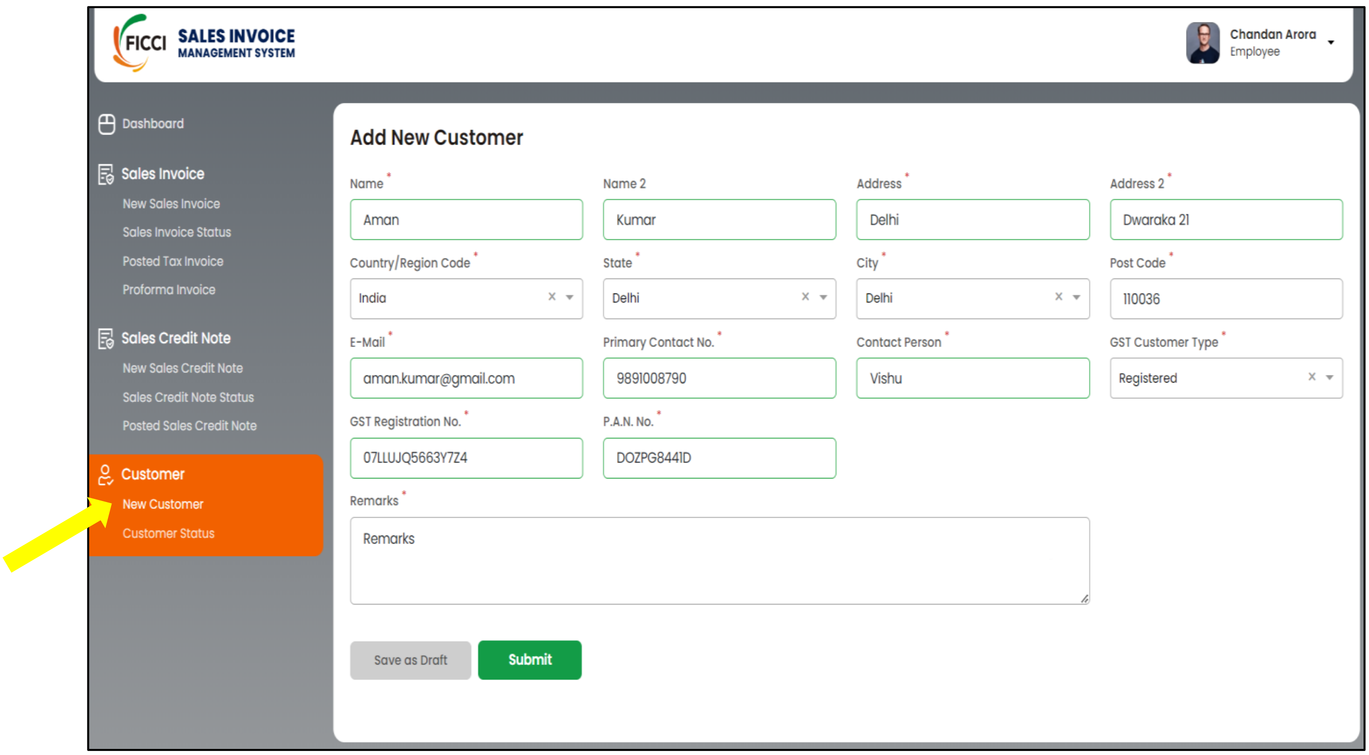


The user will be logged in successfully and will be redirected to the Dashboard where the user will be able to see the page with the description as shown in the above image.

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

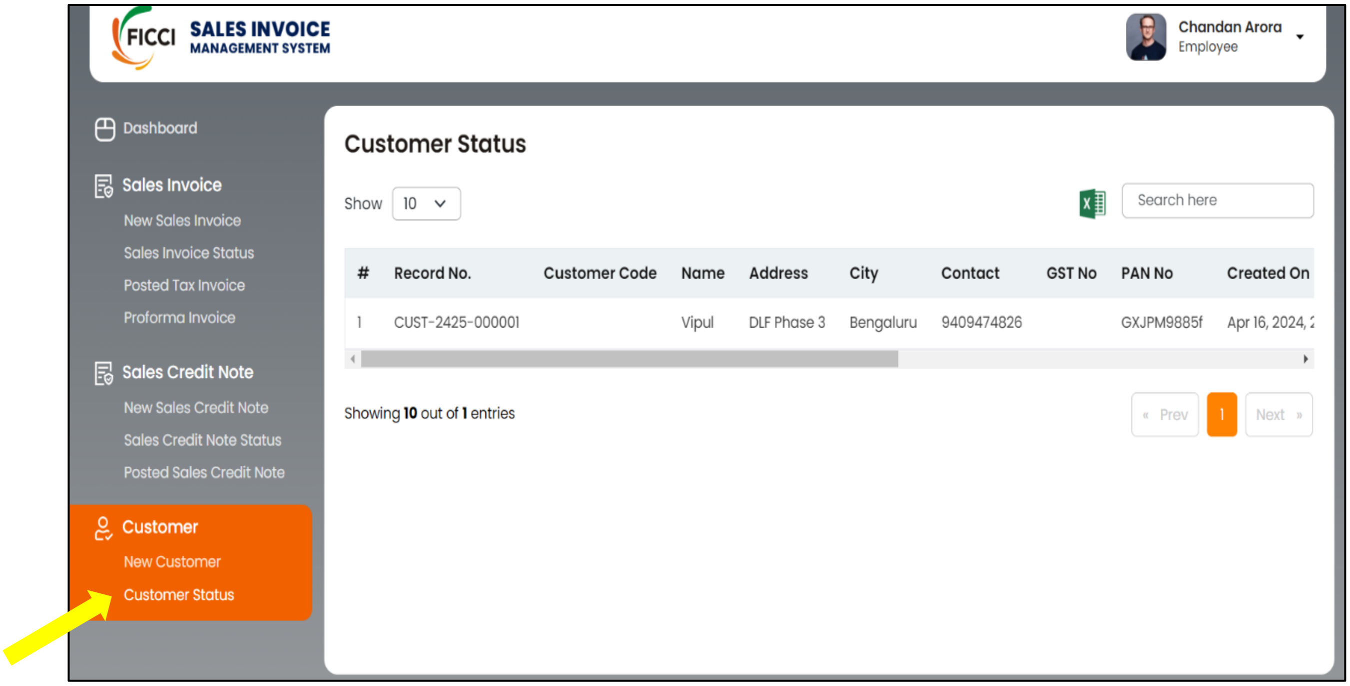


- The user has to fill in all the mandatory details required to add a new customer.

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



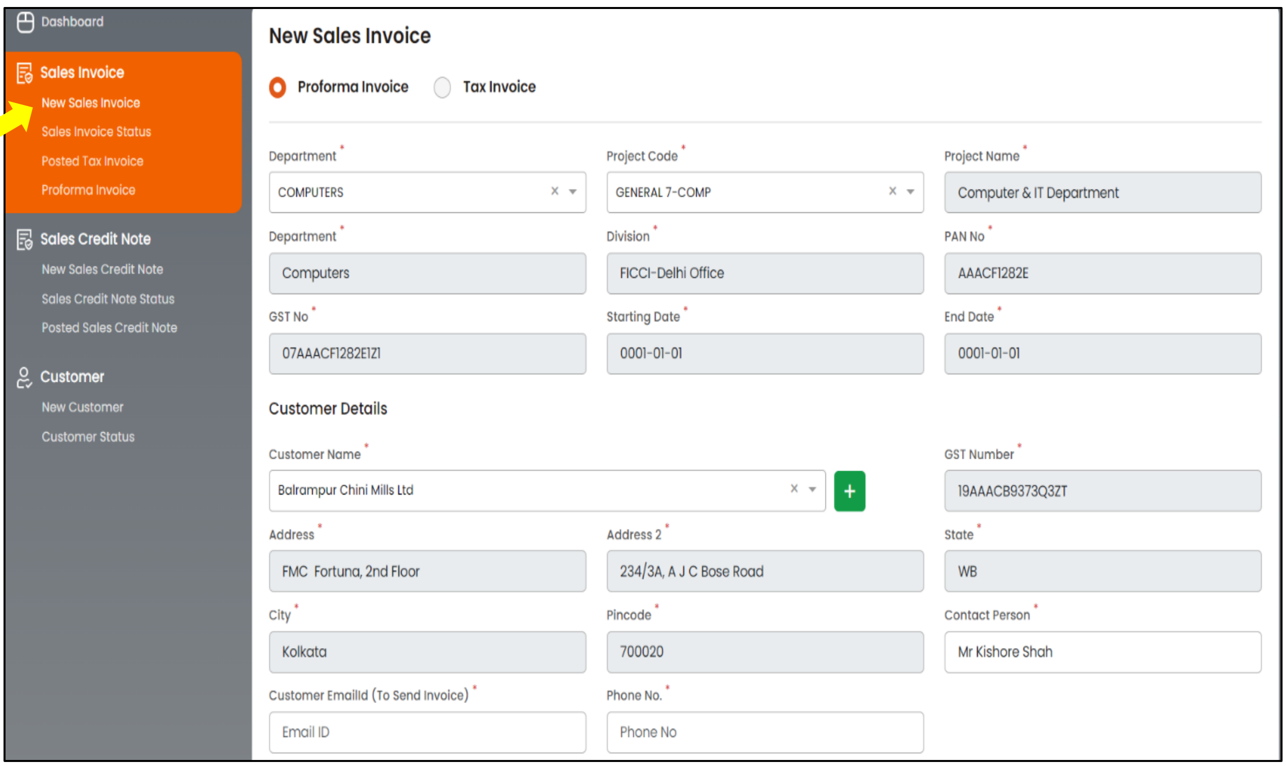
- On the Customer Status page, the User can find the customer details.
- Users can search for a customer in the "Search here" section by entering various details, except the Record No.
- The user can view up to a maximum of 100 records by clicking on the dropdown in the show option.
- To navigate to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

Sales Invoice

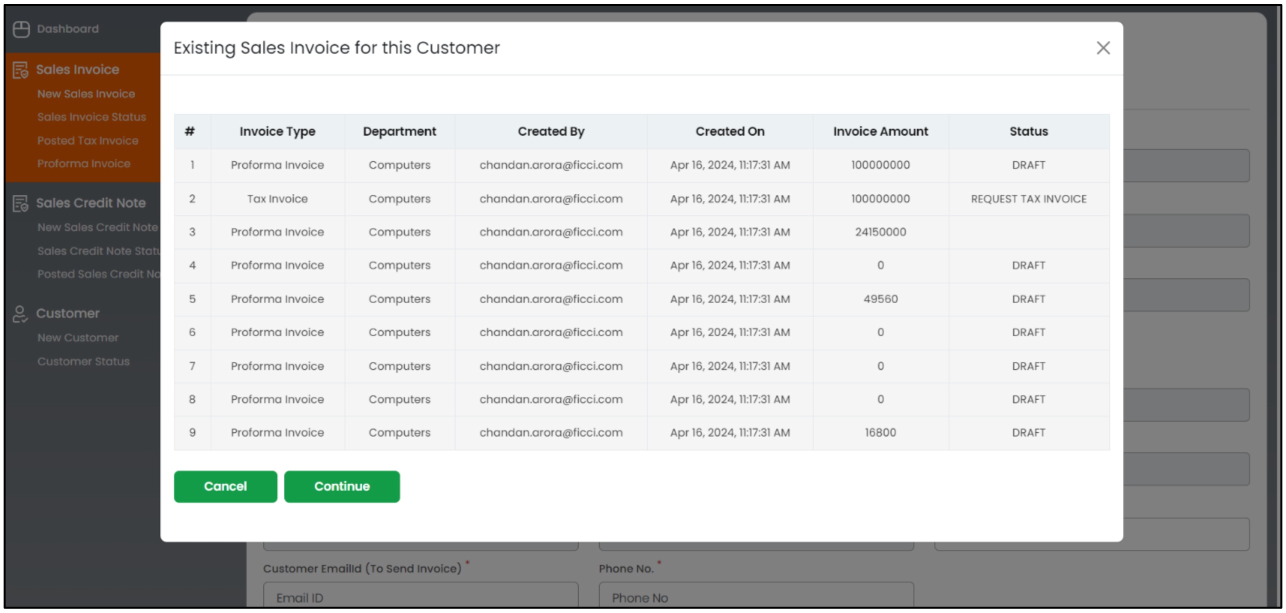
1. New Sales Invoice

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.

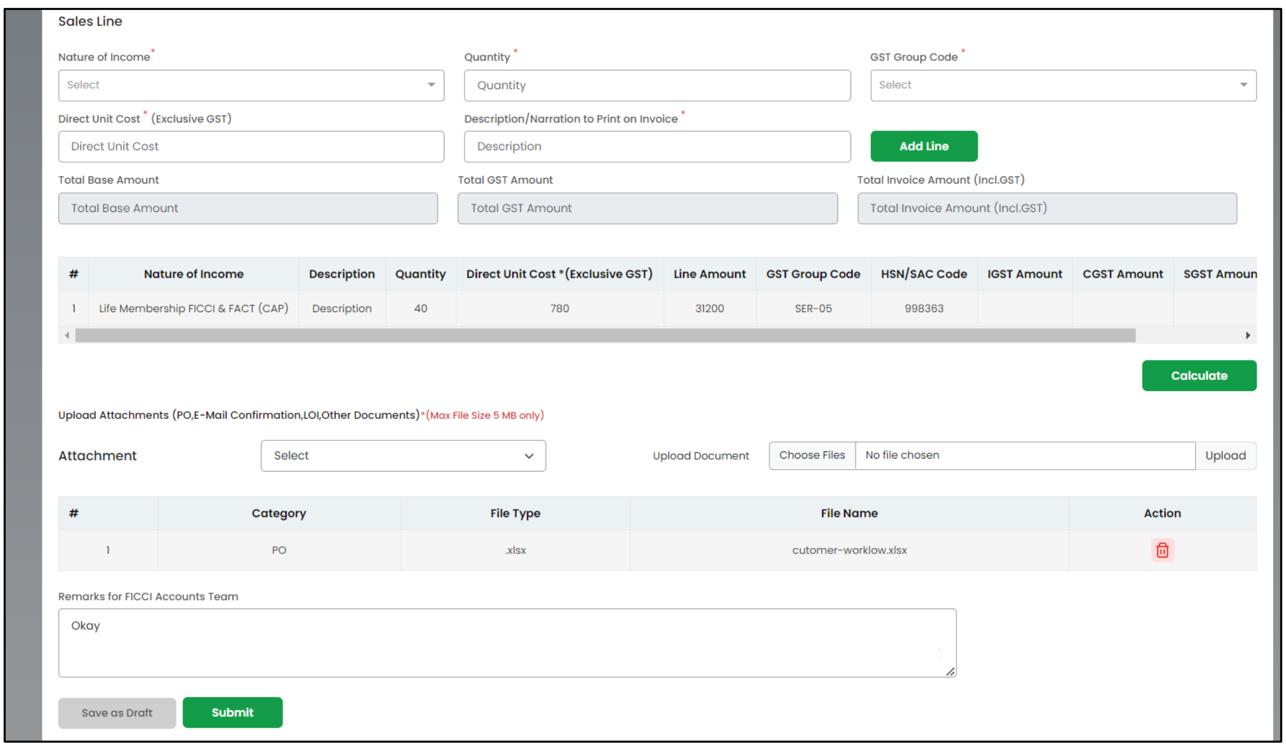
Proforma Invoice



- 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.



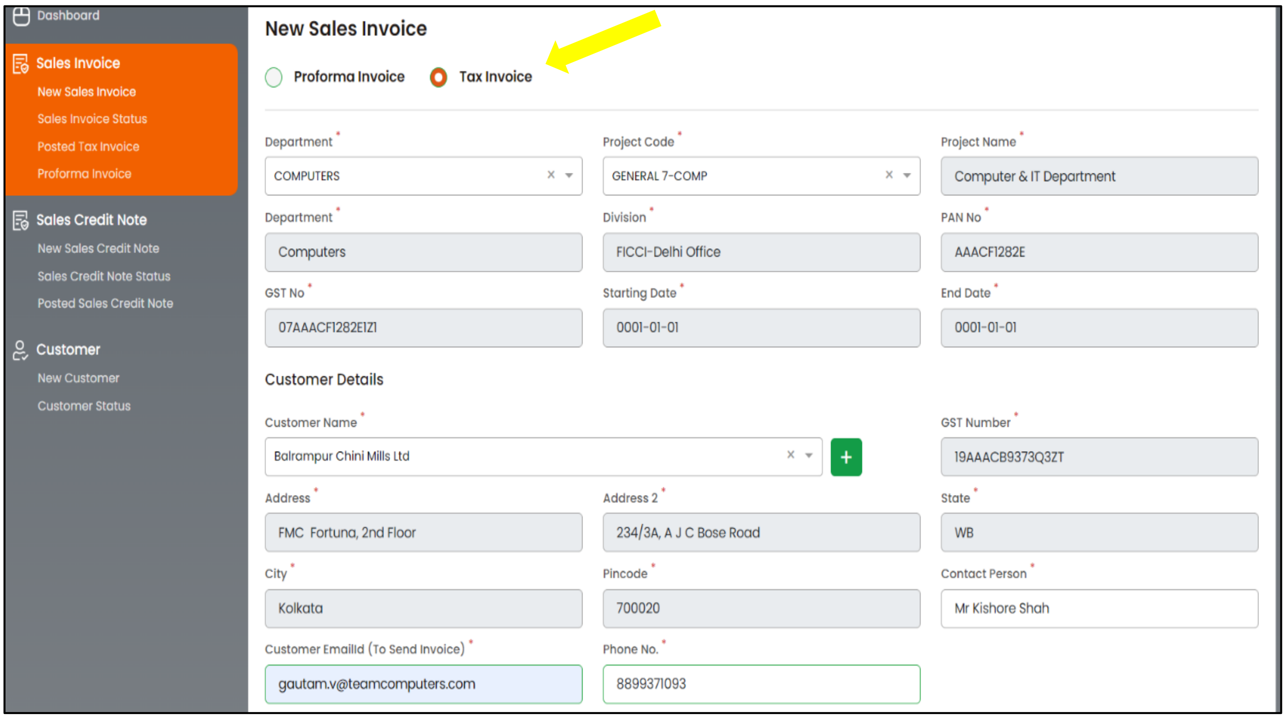
- The user has the option to choose between "**Continue**" or "**Cancel**" depending on their requirement.



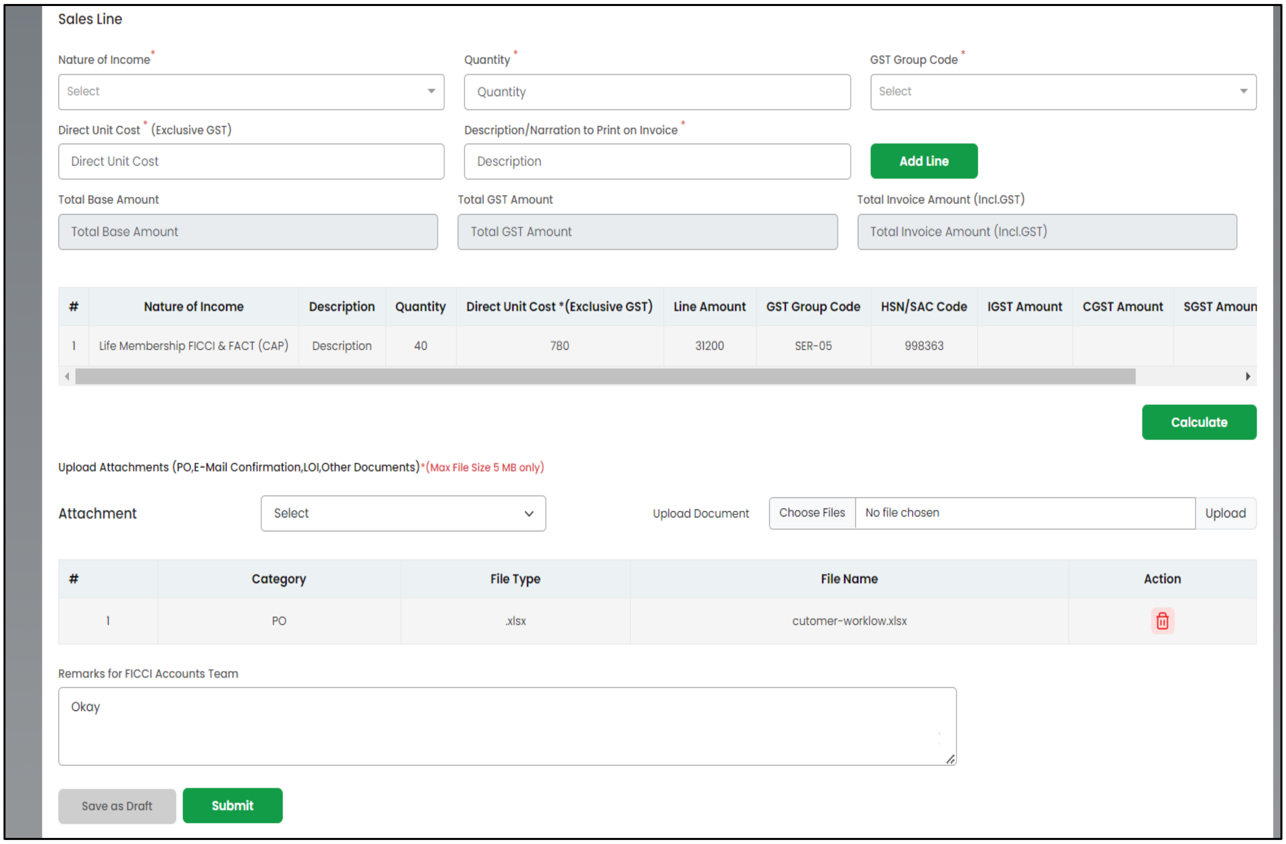
- In the Sales Line section, click on the **Add Line** button to add one or more lines.
- After adding, the **Calculate** Button option will appear, which calculates IGST, CGST, and SGST.
- For Upload Attachments, the User can select (PO, E-Mail Confirmation, LOI, or Other Documents) from the dropdown 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

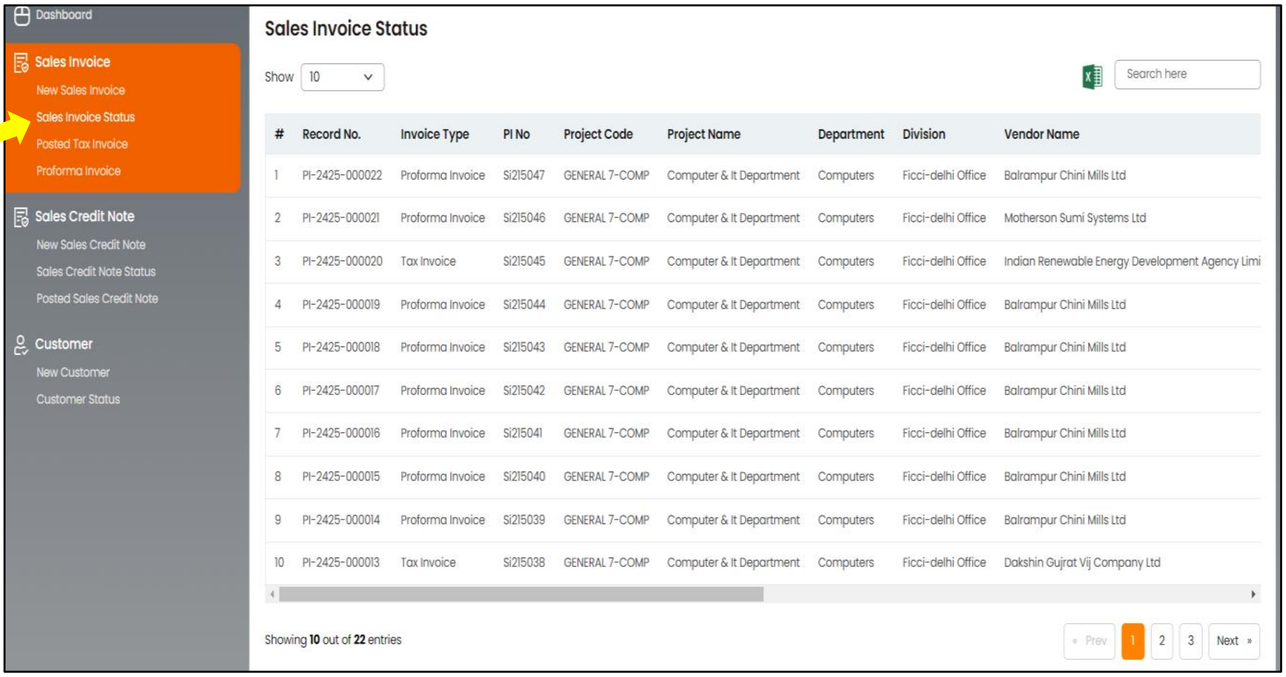


- In the Tax Invoice case, Users can select department and project codes from a dropdown menu, and the remaining grey section will be filled automatically.
- In the Customer Details section, the user can select a customer name from a dropdown menu.
- If the customer name is not found, the user can add 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.

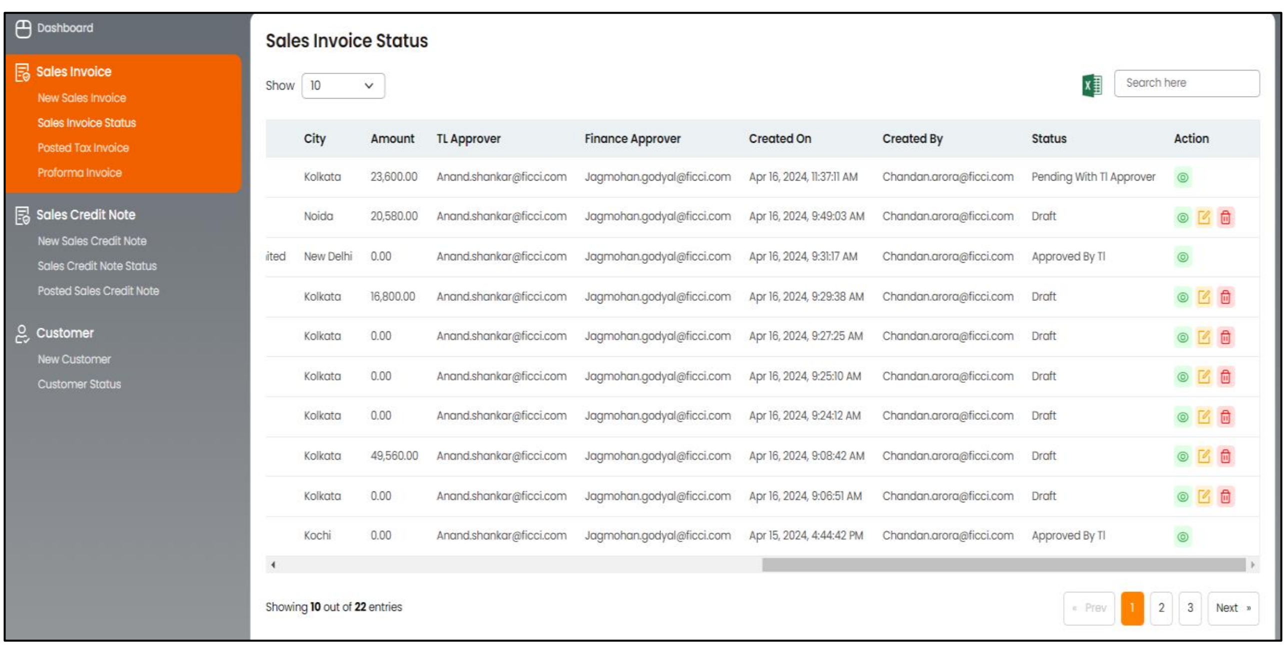


- In the Sales Line section, click on the **Add Line** button to add one or more lines.
- After adding, the **Calculate** Button option will appear, which calculates IGST, CGST, and SGST.
- For Upload Attachments, the User can select (PO, E-Mail Confirmation, LOI, or Other Documents) from the dropdown 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

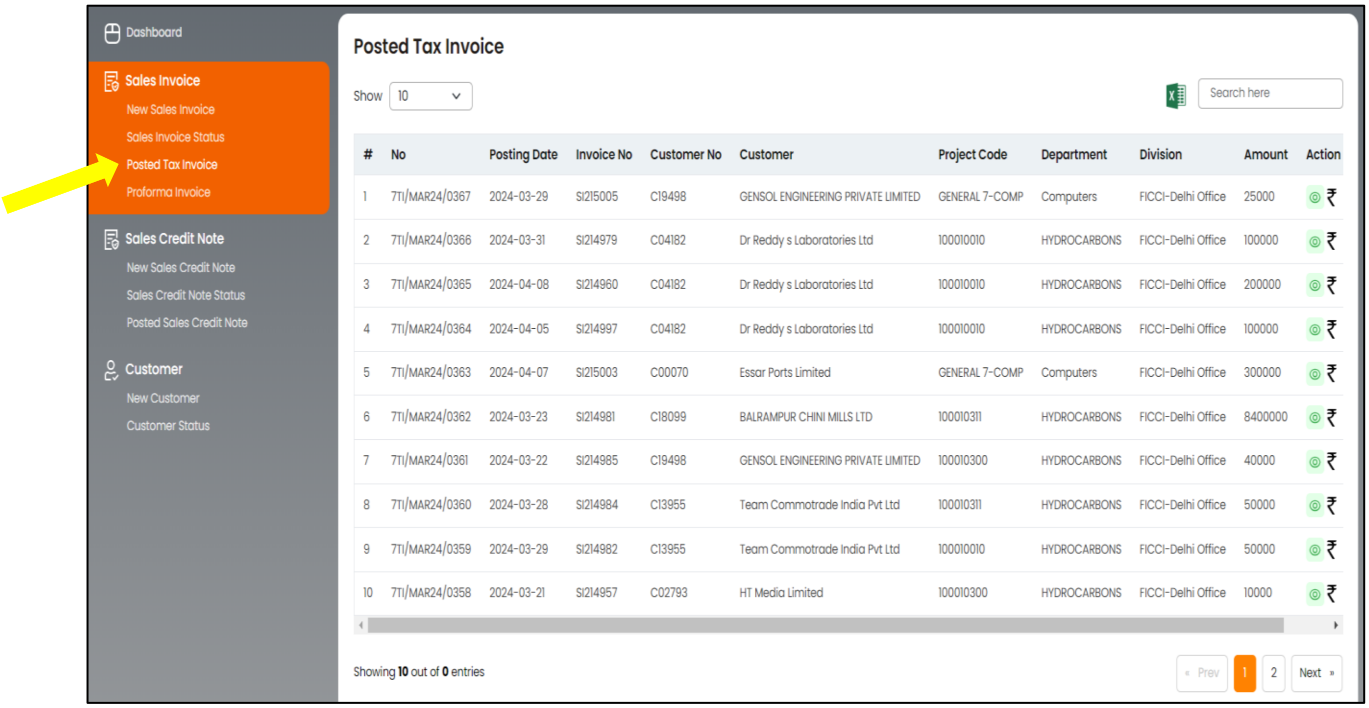


- In the Sales Invoice Status page, the User can find the customer details of both (i.e. Proforma Invoice and Tax Invoice) lists.
- Users can search for a customer in the "**Search here**" section by entering various details, except the Record No.
- The user can view up to a maximum of 100 records by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



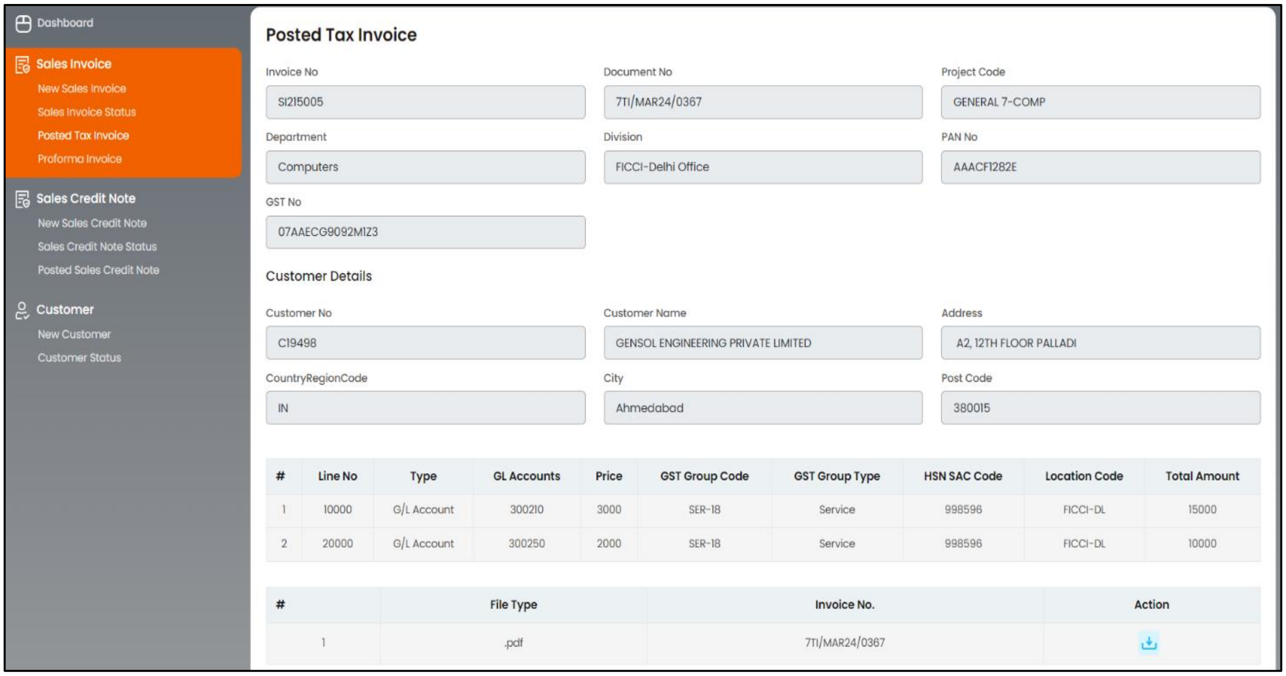
- The user can view the status of the customer.
- Under the "**Action**" section, the user can choose to view, edit, or delete items as needed.

Posted Tax Invoice



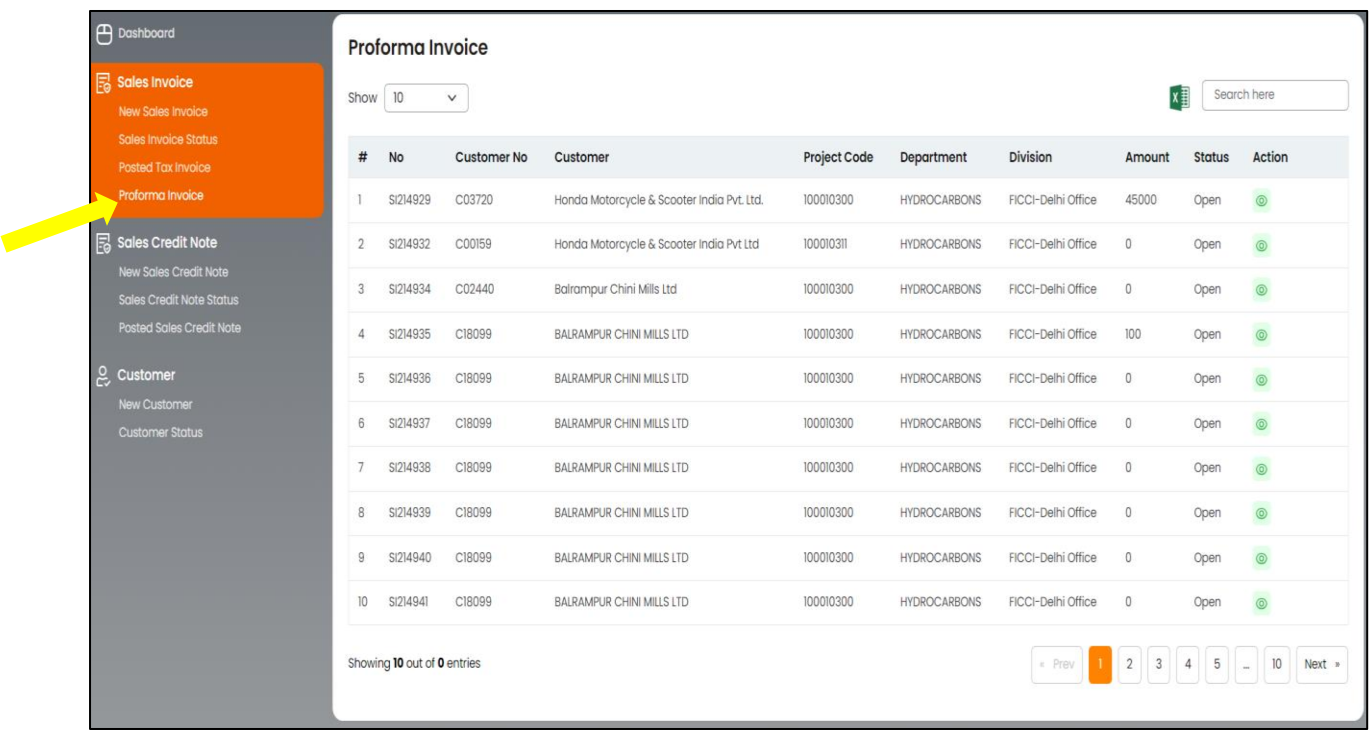
#	No	Posting Date	Invoice No	Customer No	Customer	Project Code	Department	Division	Amount	Action
1	7TI/MAR24/0367	2024-03-29	SI215005	C19498	GENSOL ENGINEERING PRIVATE LIMITED	GENERAL 7-COMP	Computers	FICCI-Delhi Office	25000	₹
2	7TI/MAR24/0366	2024-03-31	SI214979	C04182	Dr Reddy s Laboratories Ltd	100010010	HYDROCARBONS	FICCI-Delhi Office	100000	₹
3	7TI/MAR24/0365	2024-04-08	SI214960	C04182	Dr Reddy s Laboratories Ltd	100010010	HYDROCARBONS	FICCI-Delhi Office	200000	₹
4	7TI/MAR24/0364	2024-04-05	SI214997	C04182	Dr Reddy s Laboratories Ltd	100010010	HYDROCARBONS	FICCI-Delhi Office	100000	₹
5	7TI/MAR24/0363	2024-04-07	SI215003	C00070	Essar Ports Limited	GENERAL 7-COMP	Computers	FICCI-Delhi Office	300000	₹
6	7TI/MAR24/0362	2024-03-23	SI214981	C18099	BALRAMPUR CHINI MILLS LTD	100010311	HYDROCARBONS	FICCI-Delhi Office	8400000	₹
7	7TI/MAR24/0361	2024-03-22	SI214985	C19498	GENSOL ENGINEERING PRIVATE LIMITED	100010300	HYDROCARBONS	FICCI-Delhi Office	40000	₹
8	7TI/MAR24/0360	2024-03-28	SI214984	C13955	Team Commotrade India Pvt Ltd	100010311	HYDROCARBONS	FICCI-Delhi Office	50000	₹
9	7TI/MAR24/0359	2024-03-29	SI214982	C13955	Team Commotrade India Pvt Ltd	100010010	HYDROCARBONS	FICCI-Delhi Office	50000	₹
10	7TI/MAR24/0358	2024-03-21	SI214957	C02793	HT Media Limited	100010300	HYDROCARBONS	FICCI-Delhi Office	10000	₹

- 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.



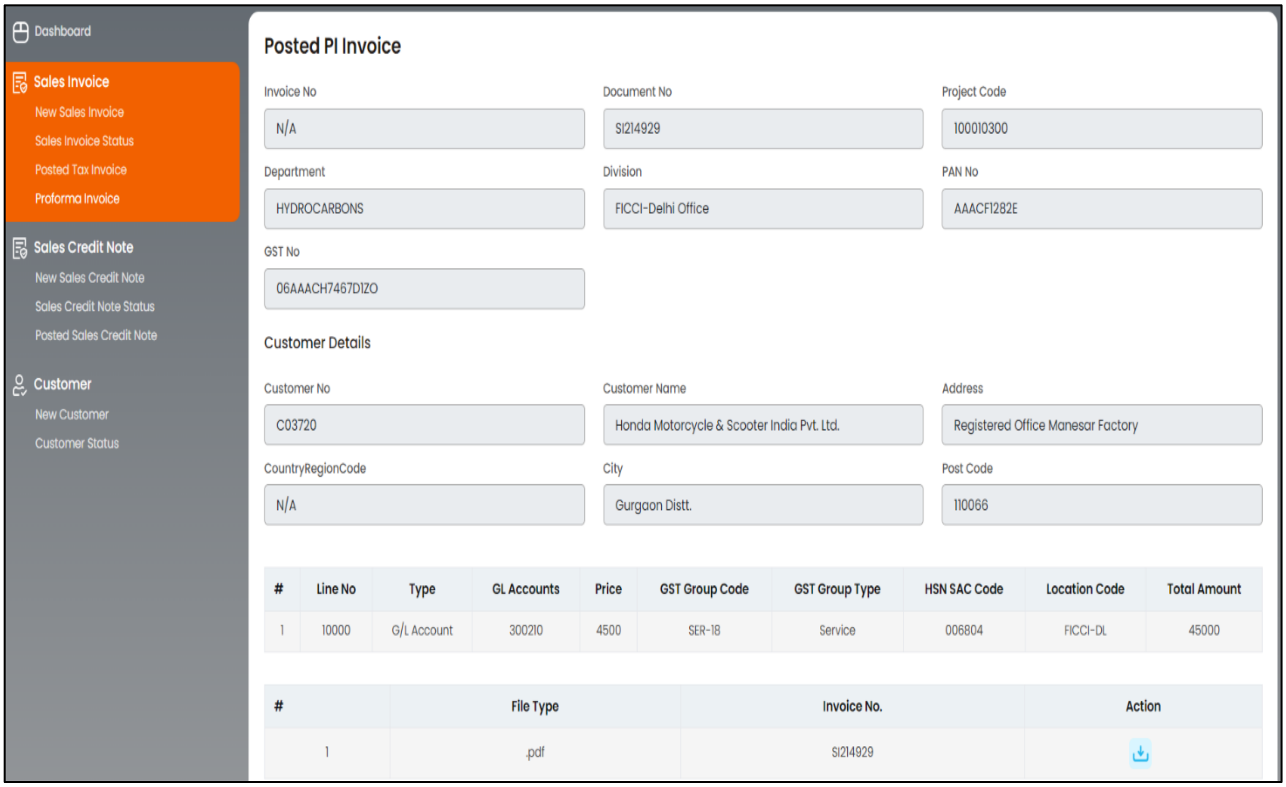
- In the "**Action**" section, the user can view Posted Tax Invoice details.
- Clicking on the view icon, a new page "**Posted Tax Invoice**" will open with details of the customer.

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.

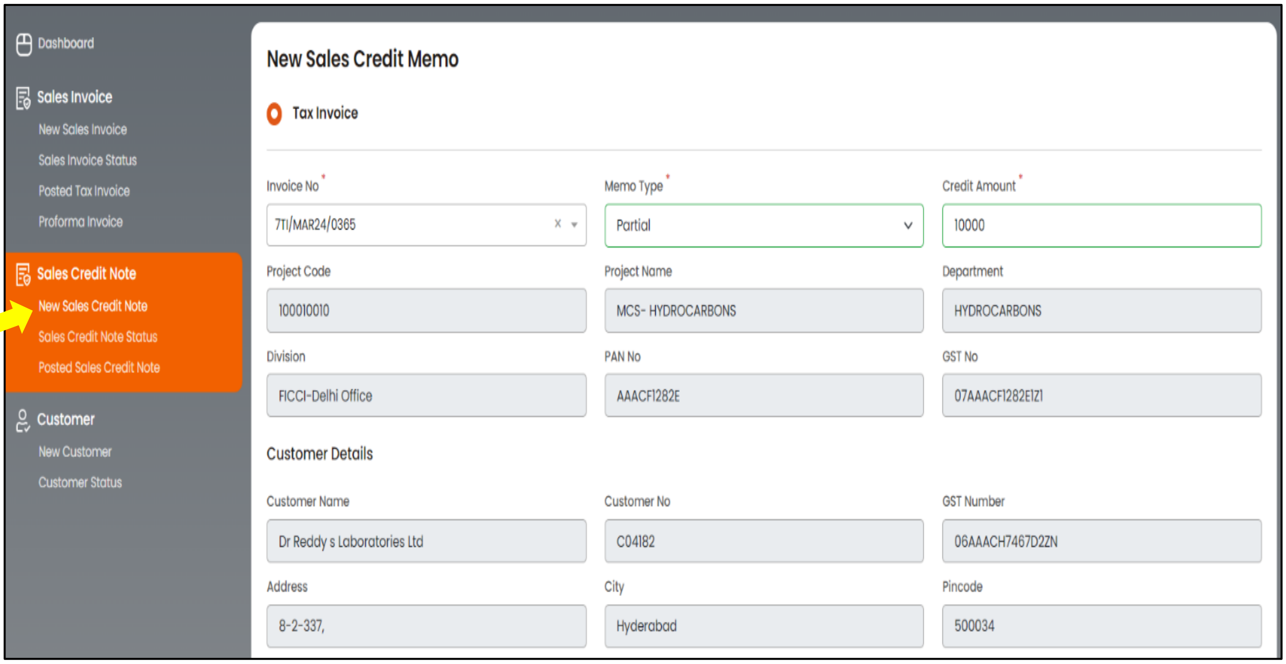
- The user can view up to a maximum of 100 records by clicking on the dropdown in the **show** option.
- To navigate to the next or previous page, click the buttons in the bottom right corner.



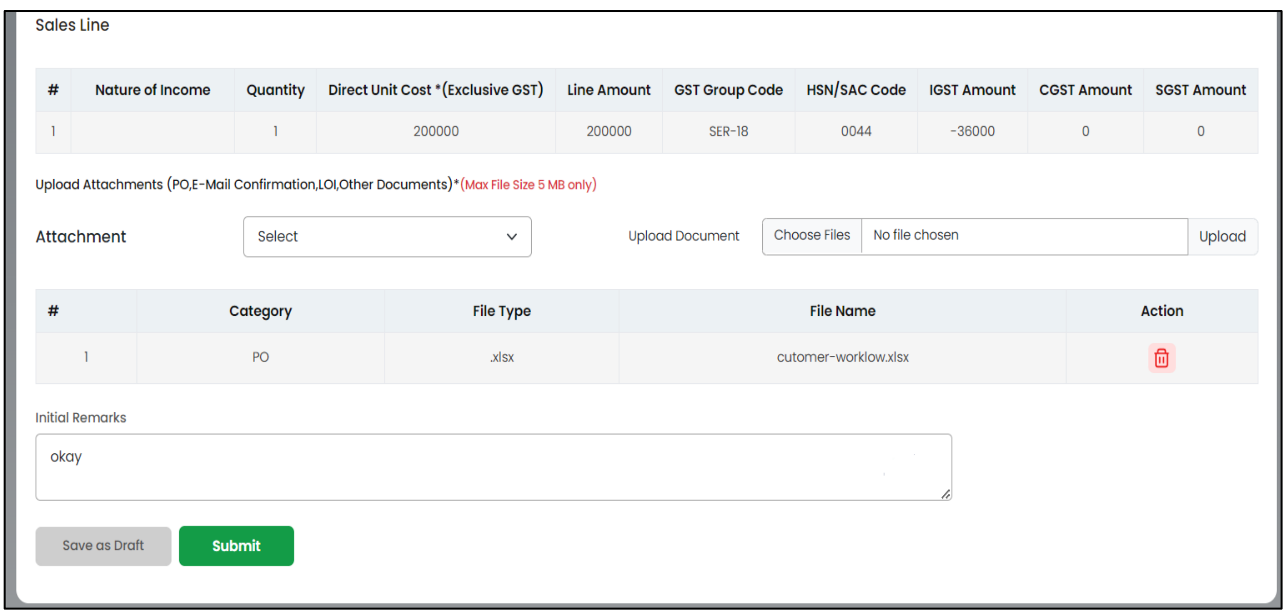
- In the "**Action**" section, the user can view Proforma Invoice details.
- Clicking on the view icon will open a new page “**Posted PI invoice**” with details of the customer.

Sales Credit Note

New Sales Credits Note



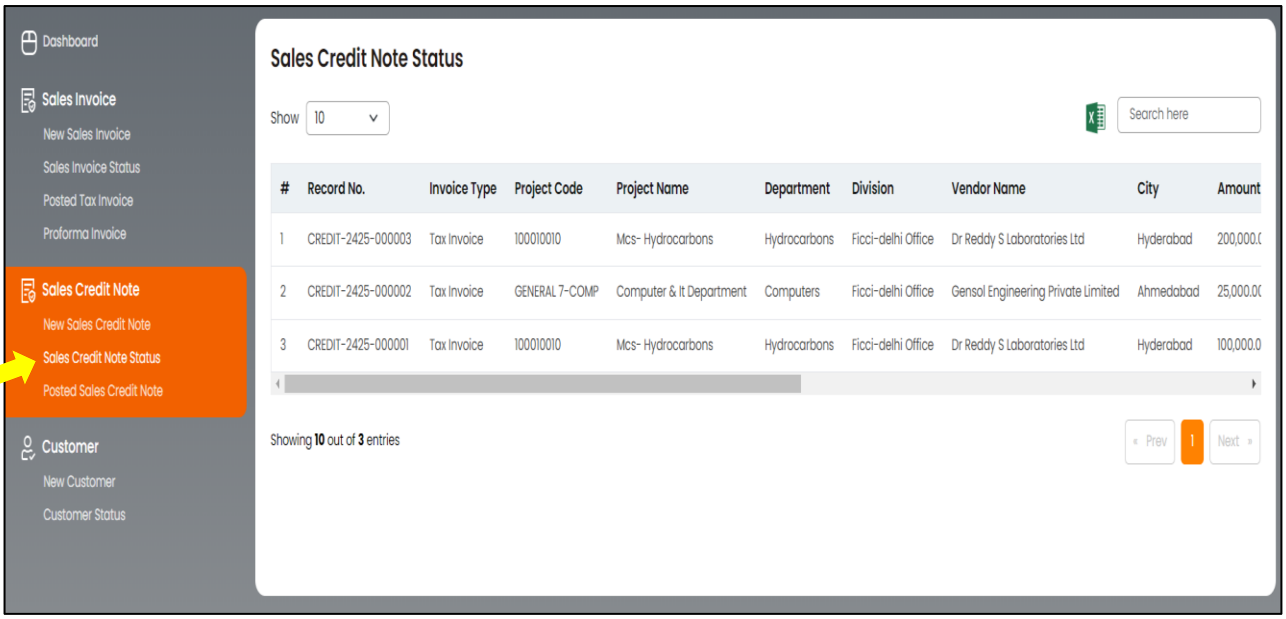
- In the New Sales Credit Memo (Tax Invoice) case, Users can select Invoice No. and Memo Type from a dropdown menu and enter the Credit Amount. The remaining grey section will be filled automatically.



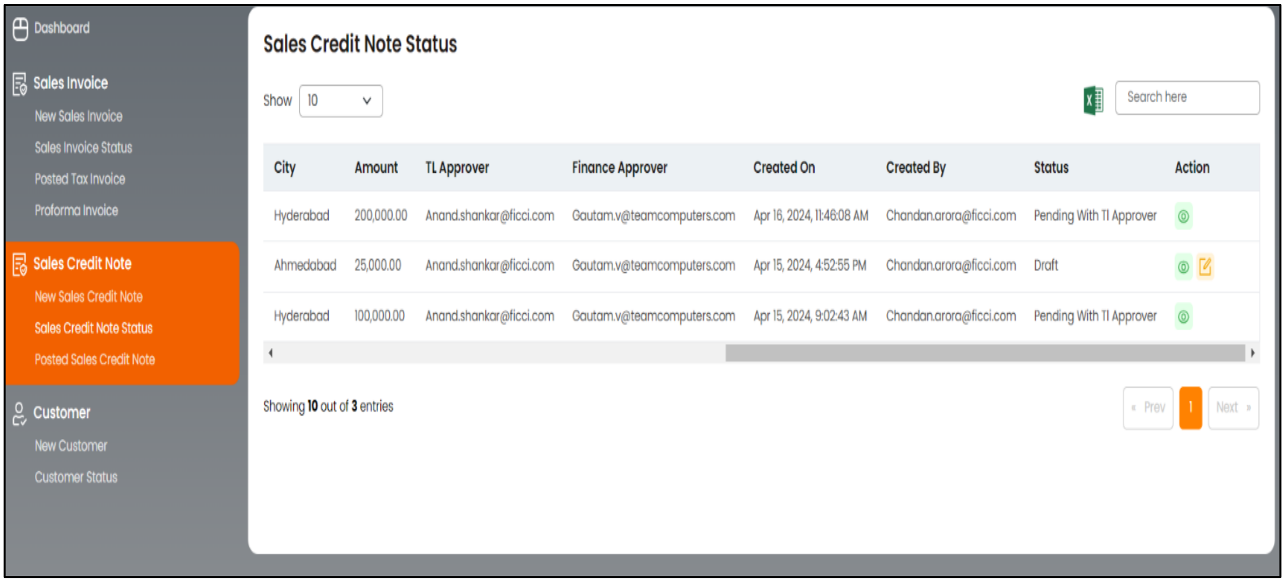
- For Upload Attachments, the User can select (PO, E-Mail Confirmation, LOI, or Other Documents) from the dropdown menu, and after uploading a document by clicking "**Choose files**," the file details will be displayed.

- 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

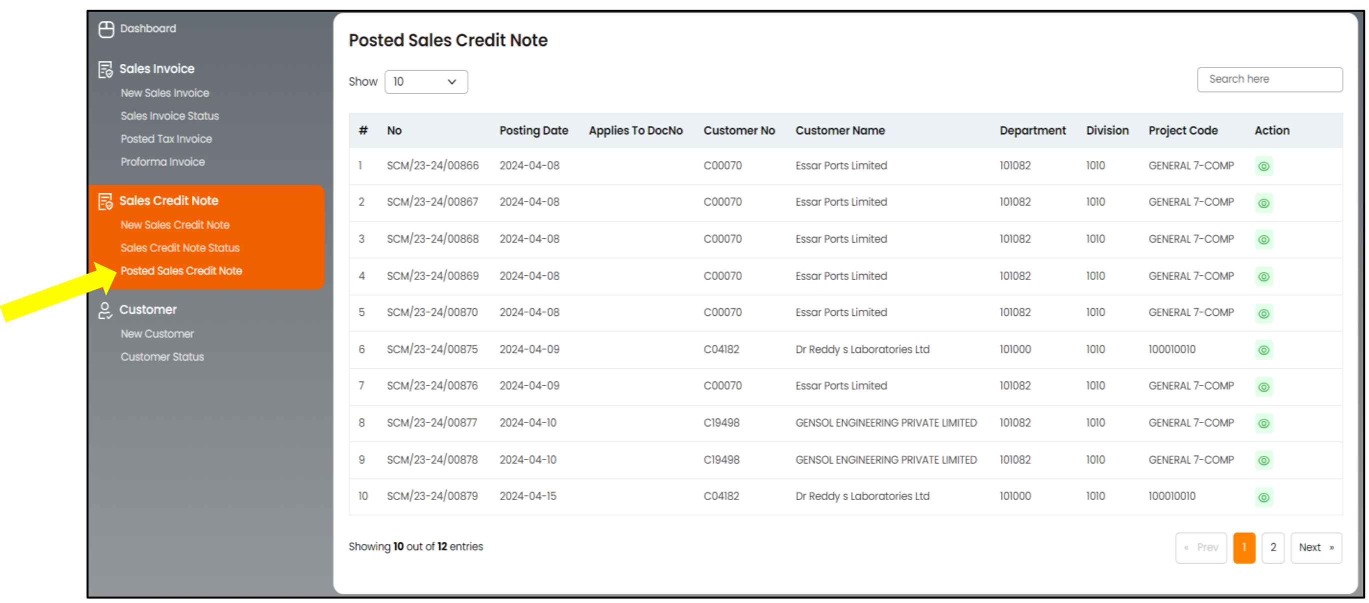


- In the Sales Credit Note Status page, the User can find the status of the sales credit note.
- Users can search for a customer in the "**Search here**" section by entering various details, except the Record No.
- The user can view up to a maximum of 100 records by clicking on the dropdown in the **show**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