
Esajee Procurement

UI and Functional Design

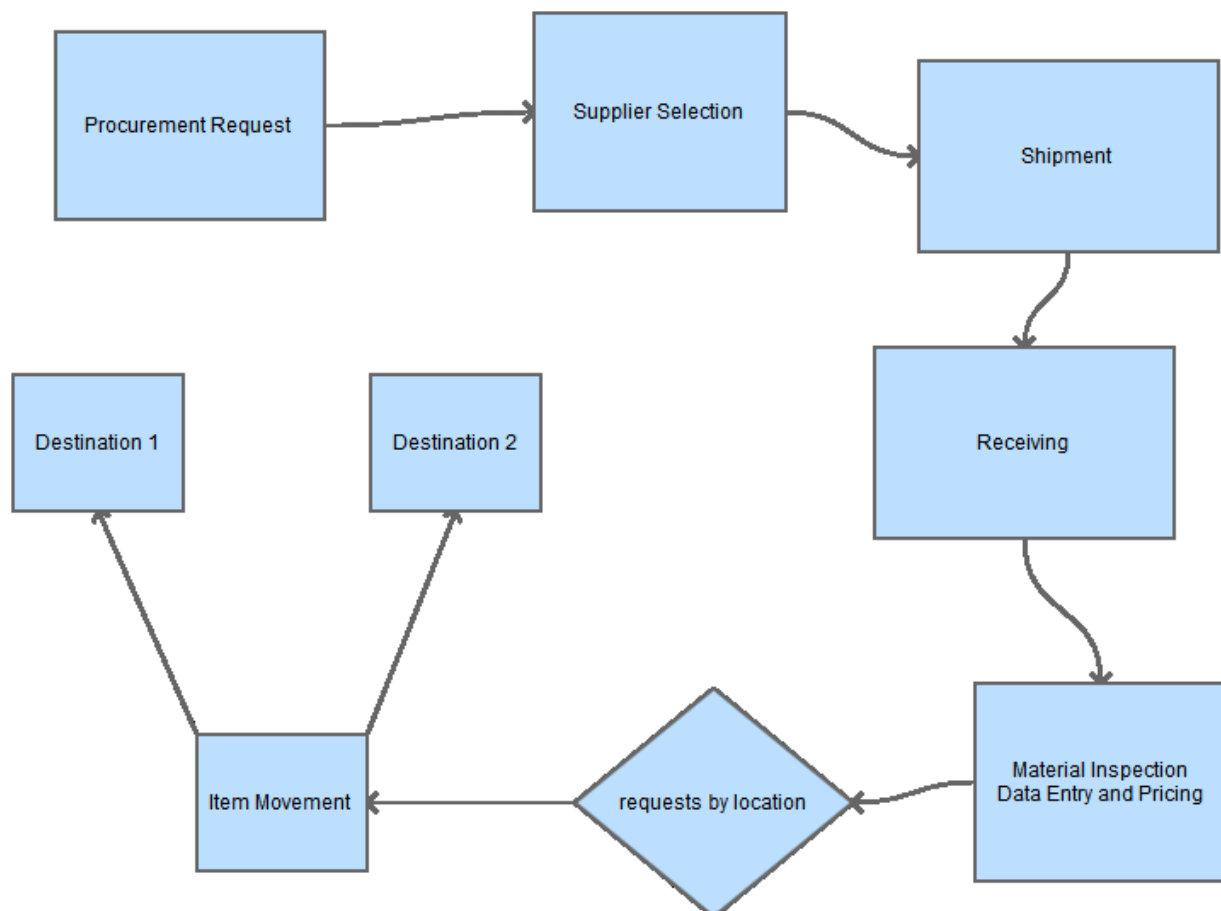
V0.3

1. Overview

This document covers the first phase of the procurement module of the Esajee ERP Suite. The resulting module should not be considered commercial off the shelf ready to sell product. Since this module has to integrate with the existing Esajee systems, this document does not cover the user management and access control list. Moreover, SaaS is not a consideration at this point.

2. Existing Business Process

- Purchase requests are handled by staff and added to the purchase list
- The items are periodically sent via
 - Email
 - Microsoft Excel
 - Communicated via Phone
- Vendors receive orders and fulfillment process starts
- Invoice is sent for clearance
- Invoice is added to the system after material inspection



3. Limitations

- Supplier Comparison is often not available
- Barcodes aren't always listed in the supplier invoice
- Multiple data entry points and no history may result in duplicate or incorrect orders
- No deadlines and incorrect fulfillment may result in losses
- Customer's orders that are not tracked properly may result in losses
- Multiple data entry steps result in delayed shelving or incorrect pricing

4. Solution Overview

Esajee Procurement is intended to automate the business process and document all entry points at a single place that could be used as reference in future. Moreover, it will help

- make critical business decisions
- reduce product losses
- streamline data entry and pricing mechanism

5. Features

a. Access Control List

Existing users of the system will have the ability to login to the application.

b. System Settings

- Will only be reserved for Admin group
- Settings will override the existing settings of Esajee Systems including Date, Time, Currency

c. Purchase Indent

d. Bulk Indent

e. Supplier Selection

i. Quotations

ii. Approval

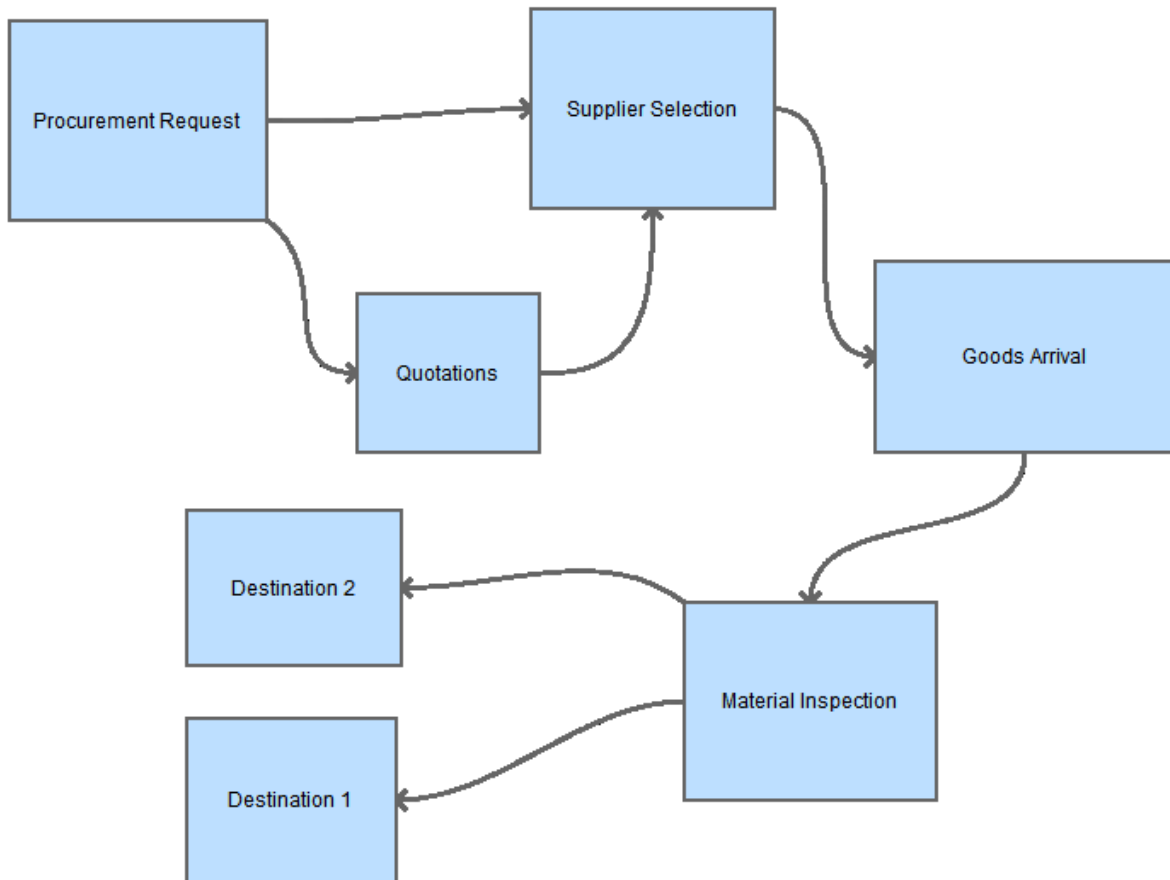
f. Purchase Orders

g. Goods Arrival (Shipment)

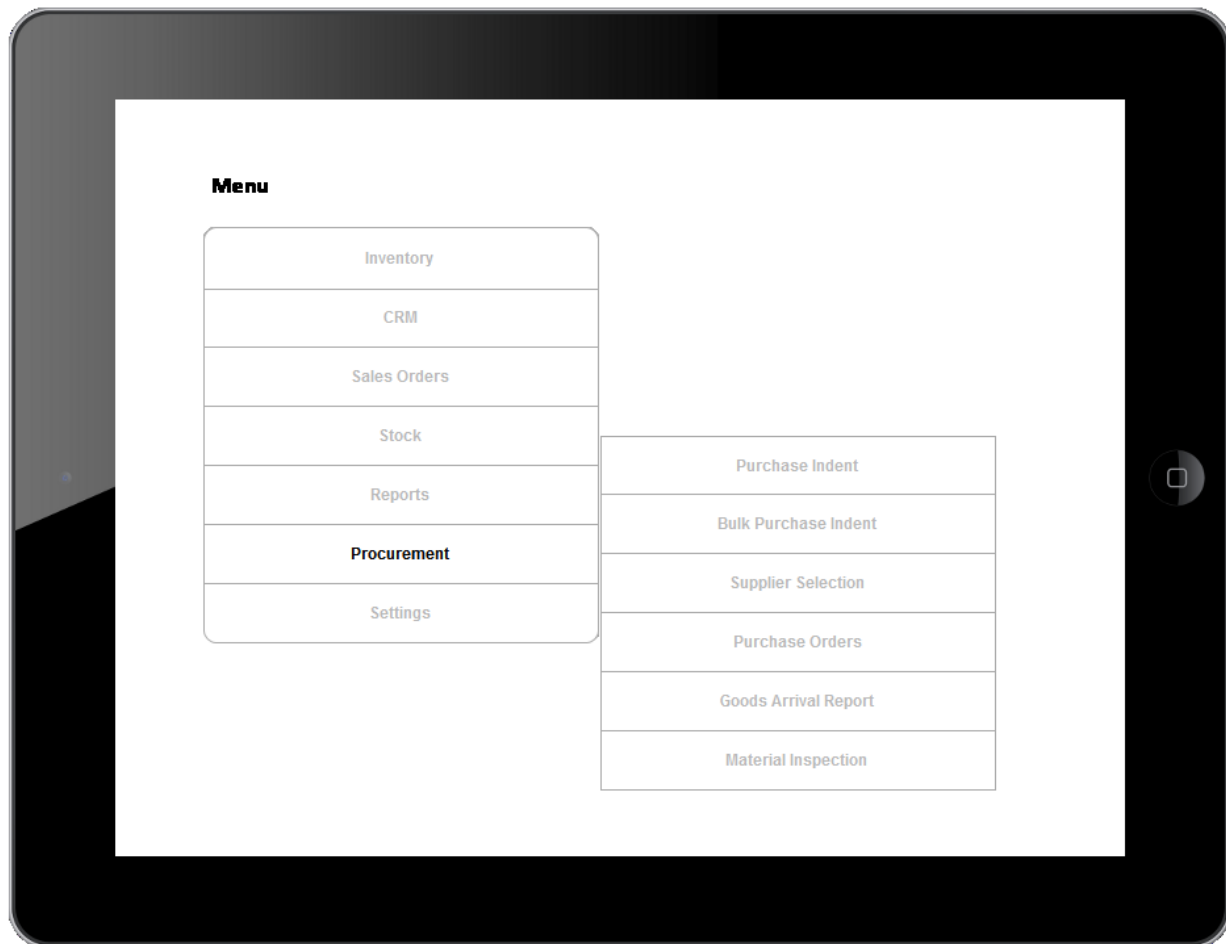
h. Material Inspection

i. Receiving (Stock Updates)

6. Process Flow



New Menu



Following sections were added to new menu:

1. Inventory
2. CRM
3. Sales Orders
4. Stock
5. Reports
6. Settings

All settings were moved to "Settings" menu

a. System Settings (Admin Only)



Settings

Company Name

Administrator Email

Upload Logo

Base Currency

Dollar Value

Precision (digits)

Timezone

Date Format

Time Format

Save

A new version of Settings page has been created and will replace the existing page, see below:



Settings > Company

Company Name

Website

Country

Timezone

Email

Phone

Mobile

Tax Label

Tax Number

Default Sales Tax

Default Purchase Tax

Tax Exempt 0%

Total Tax Inclusive

Primary Location

Primary Contact

Primary Billing Location

Price List [Sales]

Price List [Purchases]

Precision (digits)

Date Format

Time Format

Company Logo

Cancel Save

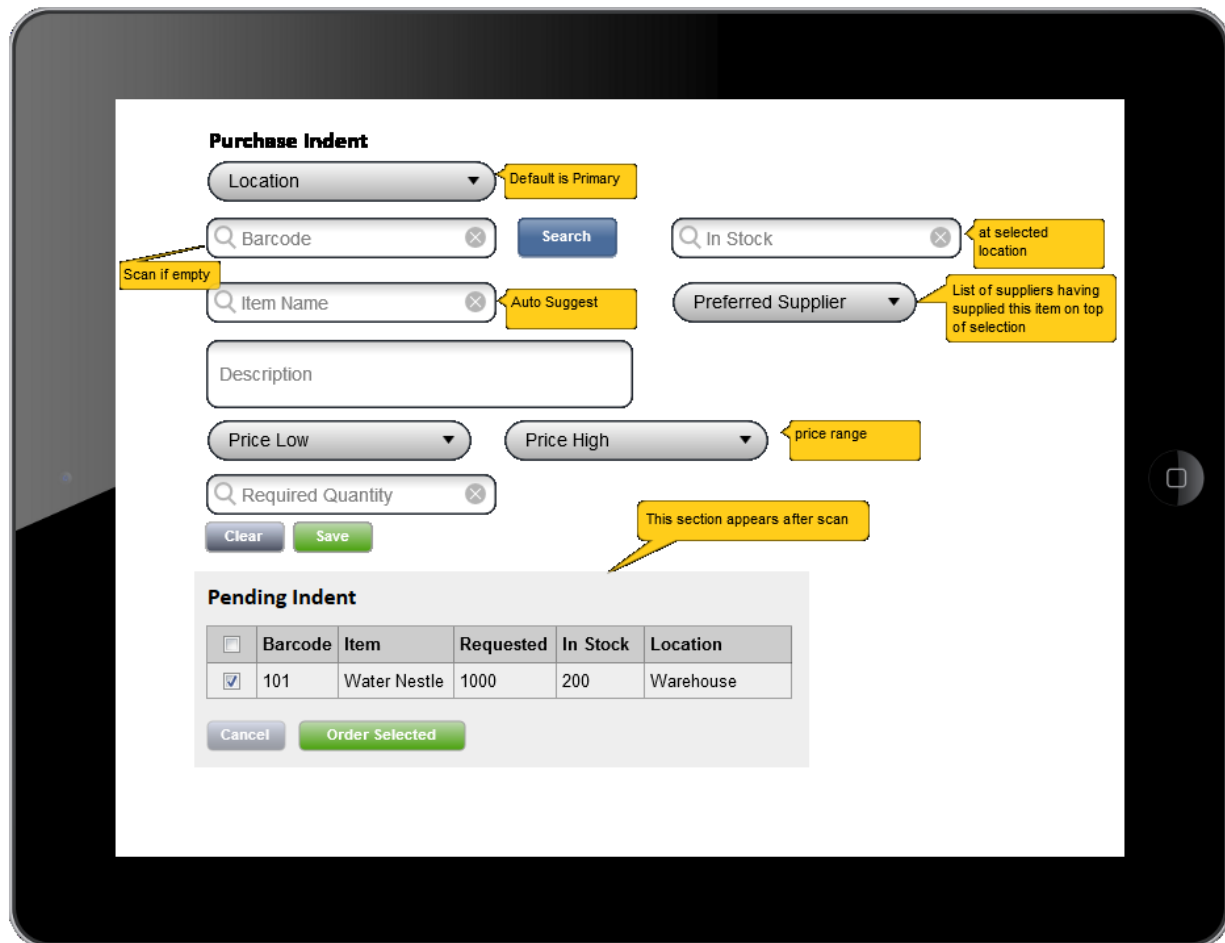
Following changes were made to this page:

1. Currencies were moved to a separate section "Currencies"
2. New fields were added
 - a. Website
 - b. Country
 - c. Phone
 - d. Mobile
3. Global Taxes section was added (it applies on company level). For more than one company, two separate accounts should be managed.
 - a. Tax Label
 - b. Tax Number
 - c. Default Sales Tax

- d. *Default Purchase Tax*
- e. *Tax Exempt*
- f. *Total Tax*
 - i. *Inclusive(applied on items and is part of total amount)*
 - ii. *Exclusive(is applied on subtotal and not included in the individual item's price)*
- g. *Primary Location*
 - i. *Warehouse*
 - ii. *Kohsar*
 - iii. *Gulberg*
 - iv. *DHA*
- h. *Primary Contact*
 - i. *Administrator*
 - ii. *Owners*
- i. *Primary Billing Location*
 - i. *Kohsar*
 - ii. *DHA*
- j. *Price List (sales)*
 - i. *Wholesale Price*
 - ii. *Retail Price*
 - iii. *Purchase Price*
 - iv. *Trade Price*
- k. *Price List (Purchases)*
 - i. *Wholesale Price*
 - ii. *Trade Price*

b. Purchase Indent

The purchase indent screen has been modified and a new screen with a few modifications has been added:



Purchase Indent

Location Default is Primary

Barcode Scan if empty Search In Stock at selected location

Item Name Auto Suggest Preferred Supplier List of suppliers having supplied this item on top of selection

Description

Price Low Price High price range

Required Quantity

Clear Save

Pending Indent This section appears after scan

<input type="checkbox"/>	Barcode	Item	Requested	In Stock	Location
<input checked="" type="checkbox"/>	101	Water Nestle	1000	200	Warehouse

Cancel Order Selected

Following features have been added to the screen:

1. Location has been added
2. In stock will now show existing units of the selected location of procurement.
3. Price range selection options have been added, this will fetch existing "Low" and "High" range from the selected location.
4. "Existing Indent" has been changed to "Pending Indent" and will not account for the "Purchase", "In Transit", "Fulfilled" units.

5. "Order Selected" should display the item in the form above it and only the order quantity should be added to process the indent.
6. Preferred Supplier has been added *

c. Purchase Indent (Management View)

Purchase Indent

Pending ▼ New or bulk New Import Excel / CSV Download Print

<input type="checkbox"/>	Order #	Item	Barcode	Ordered	Purchased	Final	Packed	Shipped	Received	Created	Updated	Updated by
<input type="checkbox"/>	PI0001	Nestle' Water	101	12	x	6	x	x	x	30-12-2014	31-12-2014	Admin
<input type="checkbox"/>	PI0002	Nestle' 500ml	102	24	x	6	x	x	x	30-12-2014	31-12-2014	Admin
<input type="checkbox"/>	PI0003	Nestle' 1.5L	103	36	x	6	x	x	x	30-12-2014	31-12-2014	Admin

Initially, the status of indent is "Pending". With each step of the procurement process, the status of item is updated at this screen. The "Final", "Purchased", "Packed", "Shipped", and "Received" are linked to the detailed information about these actions. Import process is explained on the next page.

Note: Item column will contain following information:

- a. Item Name
- b. Description

If value in "Final", "Purchased", "Packed", "Shipped", "Received" is less than "Ordered" column, the order will be considered partially processed.

This screen will have 2 more views according to user types:

1. Data Entry (who requested item)

Purchase Indent

Status ▼ New or bulk New Import Excel / CSV Download Print

<input type="checkbox"/>	Order #	Item	Barcode	Ordered	Status	Created
<input type="checkbox"/>	PI0001	Nestle' Water	101	12	In Transit	23-12-2014
<input type="checkbox"/>	PI0002	Nestle' 500ml	102	24	Purchased	23-12-2014
<input type="checkbox"/>	PI0003	Nestle' 1.5L	103	36	Pending	23-12-2014

2. Data Entry (who received item)

Purchase Indent

Received ▼

Excel / CSV

Download

Print

<input type="checkbox"/>	Order #	Item	SKU	Barcode	Ordered	Status	Created
<input type="checkbox"/>	PI0001	Nestle` Water	NSTL-24XL	101	12	Received	23-12-2014
<input type="checkbox"/>	PI0002	Nestle` 500ml	NSTL-HFL	102	24	Received	23-12-2014
<input type="checkbox"/>	PI0003	Nestle` 1.5L	NSTL-1-5L	103	36	Received	23-12-2014

c. Import

Excel or CSV file could be uploaded to import new items to the existing indent. A review screen will be opened up where user could perform following operations:

1. Select desired items for upload
2. Change quantity

Import Indent

Drag

or

Choose File

Upload

<input type="checkbox"/>	Item	SKU	barcode	Qty	Location
<input checked="" type="checkbox"/>	Nestle Water	NSTL-24XL	101	12	Warehouse
<input type="checkbox"/>	Godiva Chocolate	GDVC-US	12322113	6	Warehouse
<input checked="" type="checkbox"/>	Coca Cola	CK330-CS	123	24	Warehouse

Add Selected

Clear

*Location is displayed from the user's active location defined in user management section.

d. Bulk Indent



Bulk Indent

Category Auto Suggest

Brand Auto Suggest

Supplier Auto Suggest

Price Low Price High price range

☐ Low stock

Clear Filter

Matching Items

<input type="checkbox"/>	Barcode	Item	In Stock	Location
<input checked="" type="checkbox"/>	101	Water Nestle	200	Warehouse
<input type="checkbox"/>	102	Water Bottle	5	Kohsar

Cancel Add Selected

This screen will be used to add bulk (more than one) items to the purchase indent. The filters will help user find the desired items from existing stock. After finding the right items, user could add them to the purchase indent. Location has been added to help search and add items from all available locations.

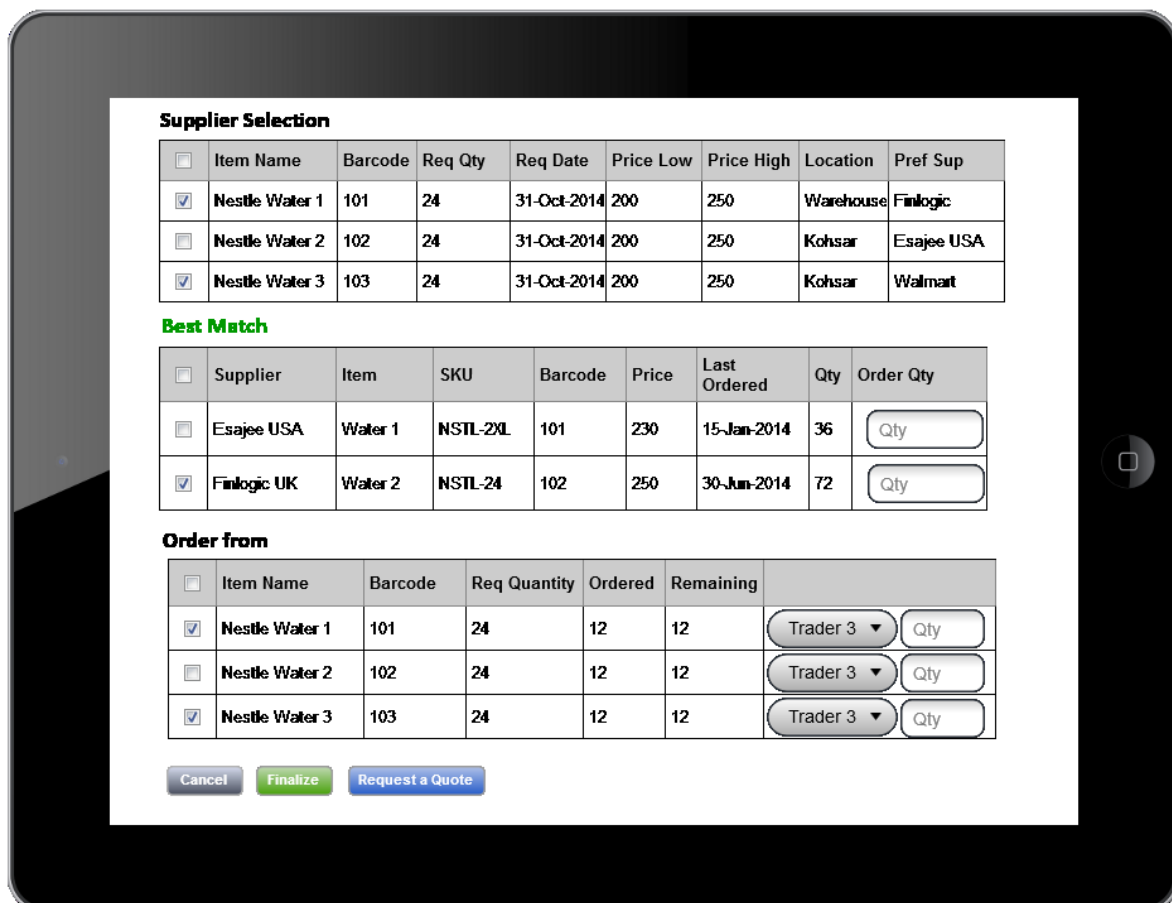
e. Supplier Selection

This screen will display all purchase indent items that are either Pending or partially processed.

Purchase Indent

Item Name	Barcode	Order Qty	Rem Qty	Req Date	Price Low	Price High	Status
Nestle Water	101	24	24	31-Oct-2014	200	250	Pending
Nestle Water 3	103	12	12	31-Oct-2014	200	250	Pending
Nestle Water 2	102	36	36	31-Oct-2014	200	250	Pending

When any of the items from this list is selected, it will display following interface for further processing.



Supplier Selection

<input type="checkbox"/>	Item Name	Barcode	Req Qty	Req Date	Price Low	Price High	Location	Pref Sup
<input checked="" type="checkbox"/>	Nestle Water 1	101	24	31-Oct-2014	200	250	Warehouse	Finlogic
<input type="checkbox"/>	Nestle Water 2	102	24	31-Oct-2014	200	250	Kohsar	Esajee USA
<input checked="" type="checkbox"/>	Nestle Water 3	103	24	31-Oct-2014	200	250	Kohsar	Walmart

Best Match

<input type="checkbox"/>	Supplier	Item	SKU	Barcode	Price	Last Ordered	Qty	Order Qty
<input type="checkbox"/>	Esajee USA	Water 1	NSTL-2XL	101	230	15-Jan-2014	36	<input type="text" value="Qty"/>
<input checked="" type="checkbox"/>	Finlogic UK	Water 2	NSTL-24	102	250	30-Jun-2014	72	<input type="text" value="Qty"/>

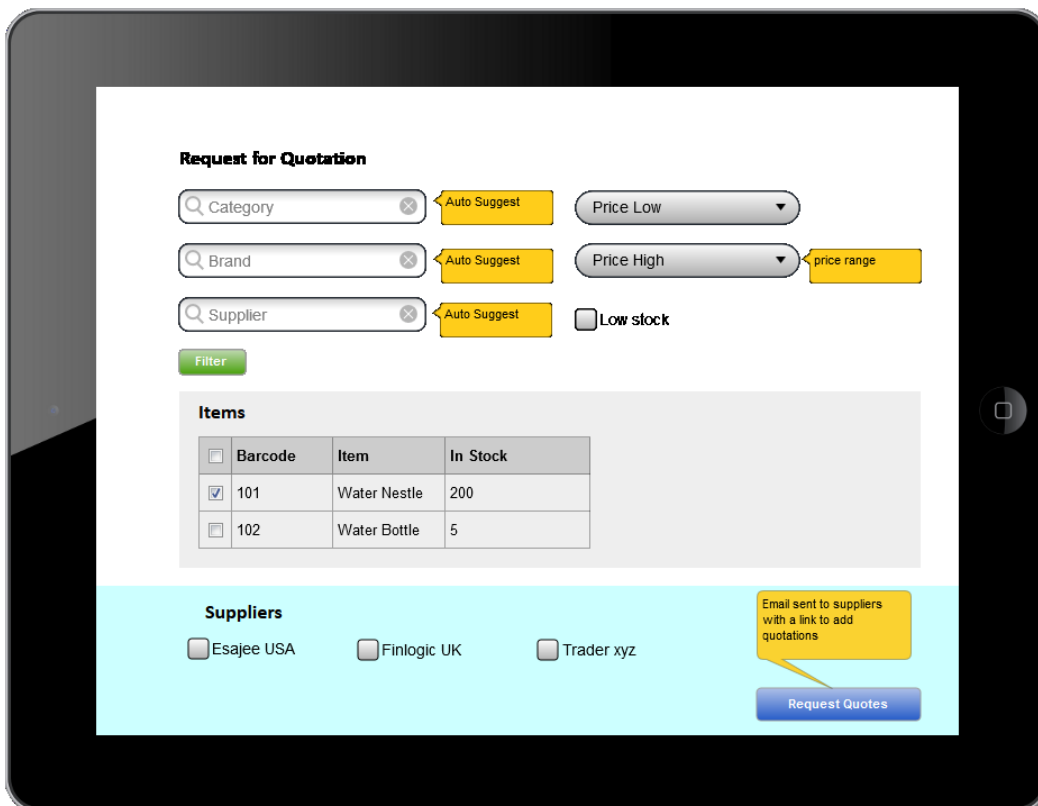
Order from

<input type="checkbox"/>	Item Name	Barcode	Req Quantity	Ordered	Remaining	
<input checked="" type="checkbox"/>	Nestle Water 1	101	24	12	12	Trader 3 <input type="text" value="Qty"/>
<input type="checkbox"/>	Nestle Water 2	102	24	12	12	Trader 3 <input type="text" value="Qty"/>
<input checked="" type="checkbox"/>	Nestle Water 3	103	24	12	12	Trader 3 <input type="text" value="Qty"/>

1. Selected items could be ordered from the best match or from the list of available suppliers.
2. Supplier Comparison is displayed on the basis location. This report gives useful insight to the past purchases and helps in supplier selection process. If user has access to other locations, the filter is provided to view other locations data.
3. On pressing the “Finalize” button, selected item will be moved to the “Pending” purchase order of the selected supplier.
4. “Request a Quote” will move the item to active quotations of selected supplier.
5. Both 3 & 4 will not appear in Supplier’s Panel (discussed later in this document under “Supplier Panel” head) until the process is finalized by the requesting person.

f. Request for Quotation (new quotation)

This screen will be used to create new quotations in bulk. The mechanism will be very similar to Bulk Indent.



Request for Quotation

Category Auto Suggest Price Low

Brand Auto Suggest Price High price range

Supplier Auto Suggest ☐ Low stock

Items

<input type="checkbox"/>	Barcode	Item	In Stock
<input checked="" type="checkbox"/>	101	Water Nestle	200
<input type="checkbox"/>	102	Water Bottle	5

Suppliers

☐ Esajee USA ☐ Finlogic UK ☐ Trader xyz

Email sent to suppliers with a link to add quotations

*** Change:** Emails will be sent after quotes are finalized and not on the “Request Quotes” action.

Esajee Procurement UI and Functional Design



Quotations could be processed and finalized from this screen. Once processed, email will be sent to the supplier with details.

Quotations

<input type="checkbox"/>	ID	Supplier	Date	Amount	Validity	Status
<input type="checkbox"/>	1	Esajee USA	10-20-2014	2000	11-12-2014	Pending
<input type="checkbox"/>	2	Finlogic UK	08-15-2014	3500	12-31-2014	Pending
<input checked="" type="checkbox"/>	3	Sulman Traders	08-15-2014	3500	12-31-2014	Final

DetailsFinalizeUpdate Terms

Details of Supplier Esajee USA

<input type="checkbox"/>	Item Name	Barcode	Req Quantity	Available Quantity	Delivery Date	Price	Local Price
<input checked="" type="checkbox"/>	Nestle Water	101	24	20	31-Oct-2014	200	210
<input type="checkbox"/>	Item xyz	555	36	36	31-Oct-2014	400	500
Total			66	56			

After receiving response from the supplier, a user could select the desired quotation and update supplier rates and quantity by using "Update Terms" from the Add/Update Quotations screen.

Add/Update Quotation

Supplier ▾

Validity 31-12-2015

Currency ▾

<input type="checkbox"/>	Order #	Item	SKU	Barcode	Ordered	Qty	Price
<input checked="" type="checkbox"/>	PI0001	Nestle` Water	NSTL-24XL	101	12	<input type="text" value="12"/>	<input type="text" value="140"/>
<input checked="" type="checkbox"/>	PI0002	Nestle` 500ml	NSTL-HFL	102	24	<input type="text" value="24"/>	<input type="text" value="140"/>
<input type="checkbox"/>	PI0003	Nestle` 1.5L	NSTL-1-5L	103	36	<input type="text" value="36"/>	<input type="text" value="145"/>

Add / UpdateClear

Finalize Quotes, is to make final changes and update quotes to Purchase Orders. Both “Quote Price” and “PO Qty” could be negotiated and changed after consultation with selected suppliers. After save operation, following processes will be performed:

- i. A purchase order (with status Finalized) will be created for the selected supplier(s)
- j. PO quantity will be updated in the PO
- k. Validity, Quote Price and Currency will be taken from Quote

Finalize Quotes

<input type="checkbox"/>	Order #	Item	Barcode	Qty	Price Range (PKR)
<input type="checkbox"/>	PI0001	Nestle` Water	101	12	135-140
<input checked="" type="checkbox"/>	PI0002	Nestle` 500ml	102	24	140-150
<input type="checkbox"/>	PI0003	Nestle` 1.5L	103	36	150-165

Finalize Quotations

Nestle` 500ml 102 NSTL-HFL

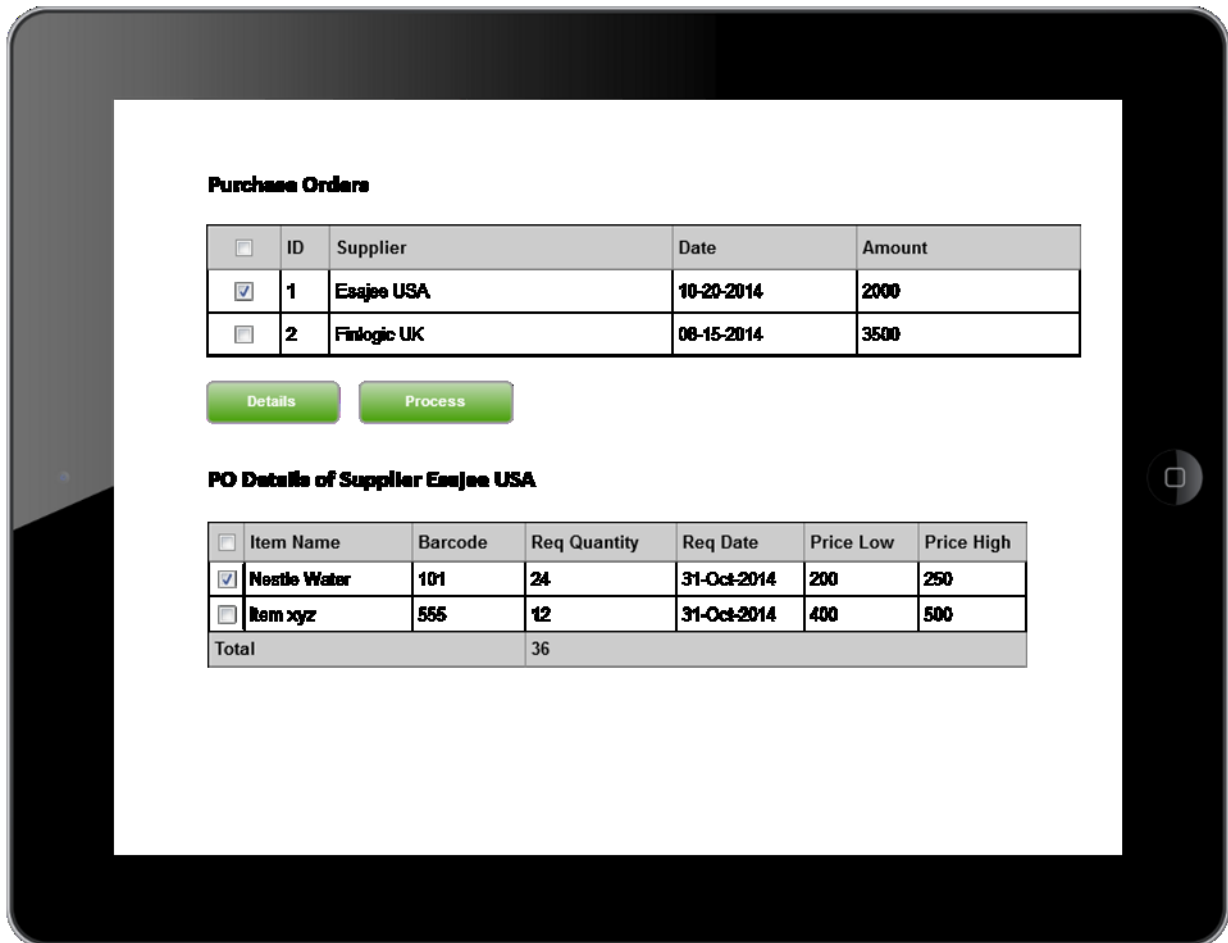
<input type="checkbox"/>	Supplier	Code	Quoted Qty	Quote Price	PO Qty
<input type="checkbox"/>	Sulman Trader	SP0001	12	<input type="text" value="140"/>	<input type="text" value="12"/>
<input type="checkbox"/>	Naveed Trading	SP0002	24	<input type="text" value="145"/>	<input type="text" value="12"/>
<input type="checkbox"/>	Hamza Traders	SP0003	36	<input type="text" value="146"/>	<input type="text" value="12"/>

Save

Cancel

g. Purchase Orders

This screen will be used to view details of final purchase orders and to make a requisition request.



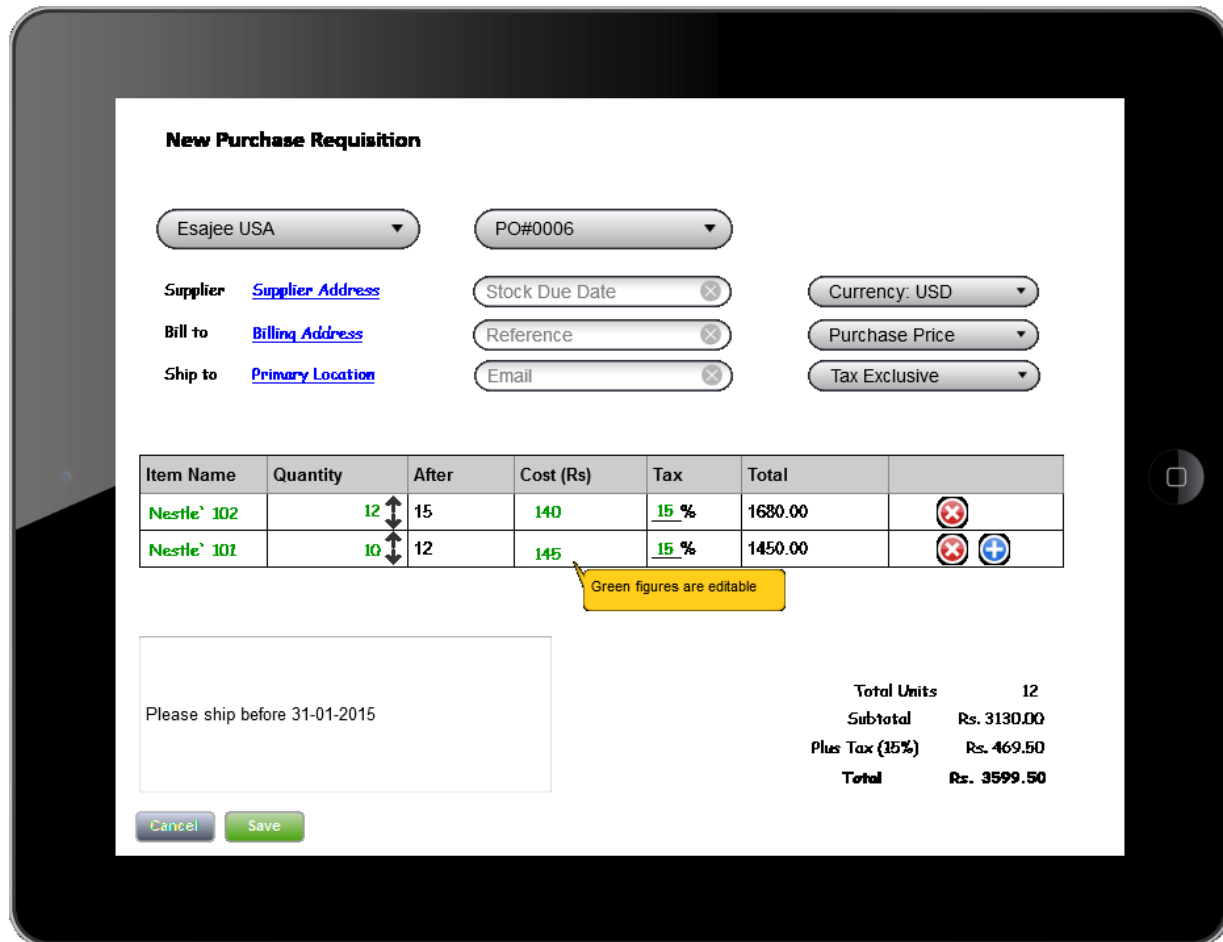
Purchase Orders

<input type="checkbox"/>	ID	Supplier	Date	Amount
<input checked="" type="checkbox"/>	1	Esajee USA	10-20-2014	2000
<input type="checkbox"/>	2	Finlogic UK	08-15-2014	3500

PO Details of Supplier Esajee USA

<input type="checkbox"/>	Item Name	Barcode	Req Quantity	Req Date	Price Low	Price High
<input checked="" type="checkbox"/>	Nestle Water	101	24	31-Oct-2014	200	250
<input type="checkbox"/>	Item xyz	555	12	31-Oct-2014	400	500
Total			36			

h. Add Purchase Requisition



New Purchase Requisition

Esajee USA PO#0006

Supplier [Supplier Address](#) Stock Due Date Currency: USD

Bill to [Billing Address](#) Reference Purchase Price

Ship to [Primary Location](#) Email Tax Exclusive

Item Name	Quantity	After	Cost (Rs)	Tax	Total	
Nestle 102	12	15	140	15 %	1680.00	⊗
Nestle 101	10	12	145	15 %	1450.00	⊗ ⊕

Green figures are editable

Please ship before 31-01-2015

Cancel Save

Total Units	12
Subtotal	Rs. 3130.00
Plus Tax (15%)	Rs. 469.50
Total	Rs. 3599.50

This screen is used to add a new purchase request (with or without indent)

- Select Supplier and fields like “supplier address”, “supplier email” will be auto filled
- Select Valid PO and remaining items will be auto filled. Otherwise add/remove items from +/- buttons
- Bill to and Ship to should be selected from available locations
- Notes for supplier could be added to the text area.
- Upon saving the requisition, an email will be sent to supplier with details and it will also appear in **Supplier Panel**.

Purchase Requisition Preview of Email/Print

PURCHASE ORDER

GBOne
Pakistan
P: +92512825100
E: esajee@esajeeusa.com


Order Number : PO0010
Created: 23 Dec 2014

Supplier:
Esajee USA
address line 1
address line 2
suburb
city, state
pakistan 90120

Bill to:
GBOne
Pakistan

Ship to:
GBOne
Pakistan

Due Date:
6 Jan 2015

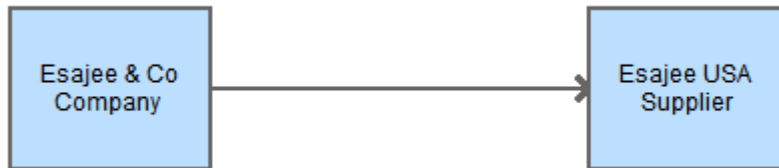
	SKU	Name	Quantity	Price	Tax	Total (PKR)
	chocolate-M-B	product - medium/blue	24	15.00	15%	Rs360.00
	chocolate-S-R	product - small/red	17	15.00	15%	Rs255.00
	chocolate-S-B	product - small/blue	16	15.00	15%	Rs240.00

Notes:
message to supplier

Subtotal	Rs855.00
Plus Tax (15%)	Rs128.25
Total Units	57
Total (PKR)	Rs983.25

i. Supplier Panel

In order to understand the relationship between “Company” making a procurement request and the “Supplier” please see the diagram below:



Here Esajee & Co as a company has been making all the transaction like adding purchase indent, making quotations and sending to different suppliers. Esajee USA as one of the suppliers could login to an application and view all requests for quotations, purchase orders and sales orders. This panel will be available to all suppliers of the system however it will not be compulsory to process orders. A simple view of the panel is displayed below:

Esajee USA

[Request for Quotations \(3\)](#)

[Purchase Order Requests \(5\)](#)

[Sales Orders \(5\)](#)

1. Request for Quotations

This section will display approved quotations for supplier feedback and will be very similar to the add quotations screen discussed earlier and mentioned below:

Add/Update Quotation

Supplier ▾ Validity 31-12-2015 Currency ▾

<input type="checkbox"/>	Order #	Item	Barcode	Ordered	Qty	Price	
<input checked="" type="checkbox"/>	PI0001	Nestle Water	101	12		12	140
<input checked="" type="checkbox"/>	PI0002	Nestle 500ml	102	24		24	140
<input type="checkbox"/>	PI0003	Nestle 1.5L	103	36		36	145

Add / Update

Clear

2. Purchase Order Requests

This is the section that will display “**New Purchase Requisition**” for this supplier. The shopping list

Purchase Orders

<input type="checkbox"/>	Order #	Company Name	Status	Invoiced	Packed	Fulfilled	Paid	Total	Created	Last Updated
<input type="checkbox"/>	SO0006	Acme Ltd	active	x	x	x	x	Rs. 74.25	12-12-2014	15-12-2014

could be printed from the same.

3. Sales Orders

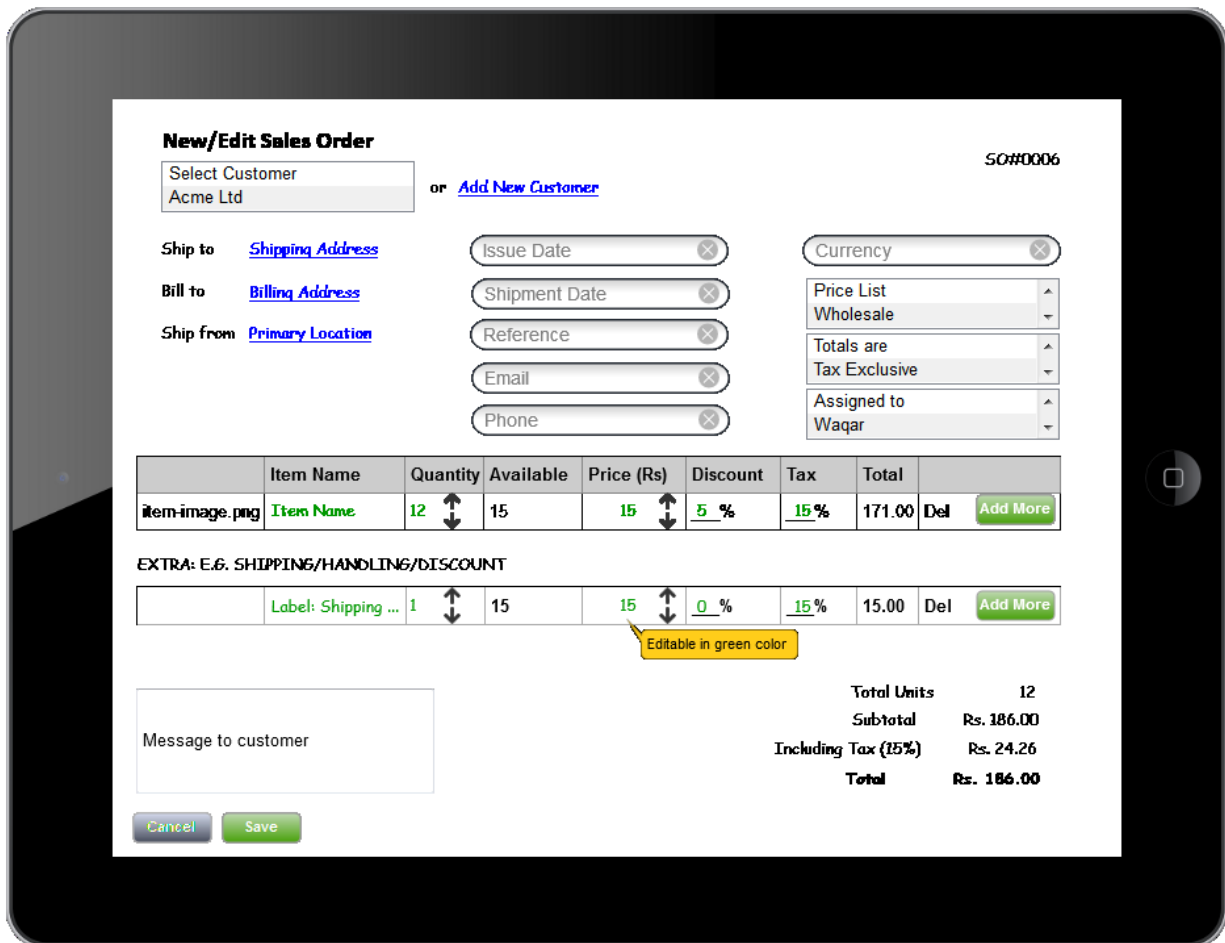
Esajee USA (as a supplier) will deliver items to Esajee & Co and in order to do so will process

Sales Orders

<input type="checkbox"/>	Order #	Company Name	Status	Invoiced	Packed	Fulfilled	Paid	Total	Created	Last Updated
<input type="checkbox"/>	SO0006	Acme Ltd	active	x	x	x	x	Rs. 74.25	12-12-2014	15-12-2014

“Purchase Requisition” by creating sales orders. The sales order is the “Fulfillment” side of the supplier and will contain different steps to handle the requisition cycle. This process will involve following steps:

a. Add Sales Order



New/Edit Sales Order SO#0006

Select Customer: or [Add New Customer](#)

Ship to: [Shipping Address](#) Issue Date: Currency:

Bill to: [Billing Address](#) Shipment Date:

Ship from: [Primary Location](#) Reference:

Email: Price List:

Phone: Totals are:

Assigned to:

Item Name	Quantity	Available	Price (Rs)	Discount	Tax	Total	
Item Name	12	15	15	5 %	15 %	171.00	Del Add More

EXTRA: E.G. SHIPPING/HANDLING/DISCOUNT

Label: Shipping ...	1	15	15	0 %	15 %	15.00	Del Add More
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Editable in green color

Message to customer:

[Cancel](#) [Save](#)

Total Units 12
Subtotal Rs. 186.00
Including Tax (15%) Rs. 24.26
Total Rs. 186.00

A "Sales Order" will pick items from the "Purchase Requisition" that is sent to the supplier. The customer will be the "Company" requesting the items. Similarly, shipping and billing location could be selected. Line items like "shipping and handling" could be added. Once, this process is complete and sales order is saved, it will generate a "Goods Arrival Report" for the company.

****At this stage the supplier must resolve ordered vs fulfilled items and cancel/justify entries that**

Reconcile Differences

<input type="checkbox"/>	Order #	Item	Barcode	Ordered	Fulfilled	Difference	Reason
<input checked="" type="checkbox"/>	P10001	Nestle` Water	101	12	0	-12	<input type="text" value="Not available"/>
<input checked="" type="checkbox"/>	P10002	Nestle` 500ml	102	24	36	+12	<input type="text" value="Discount"/>
<input type="checkbox"/>	P10003	Nestle` 1.5L	103	36	33	-3	<input type="text" value="Budget"/>

[Reconcile](#)

[Clear](#)

were greater or less than ordered qty via the screen below:

This would cause the remaining items (if any) to be moved to an unfulfilled indent section where staff could go and see details.

Items in sales order could be packed from the same screen.

Sales Order could be packed in the following way:

b. Generate Packing List

Packing List

New Shipment

Bill To

Billing Address

Packed

23 Dec 2014

Delivery

Select a type

Ship To

Billing Address

Ship From

Primary Location

	Product	Qty To Pack	Not Packed	Total Qty	Total (Rs)
<input checked="" type="checkbox"/>	sku - variant-check - composite add a note	12	0	12	171.00
<input checked="" type="checkbox"/>	Shipping and Handling charges and lets see what it does when thi...	1	0	1	15.00

Message to Customer

Shown on the packing slip

Total Units

12

Subtotal

Rs186.00

Including Tax (15%)

Rs24.26

Total

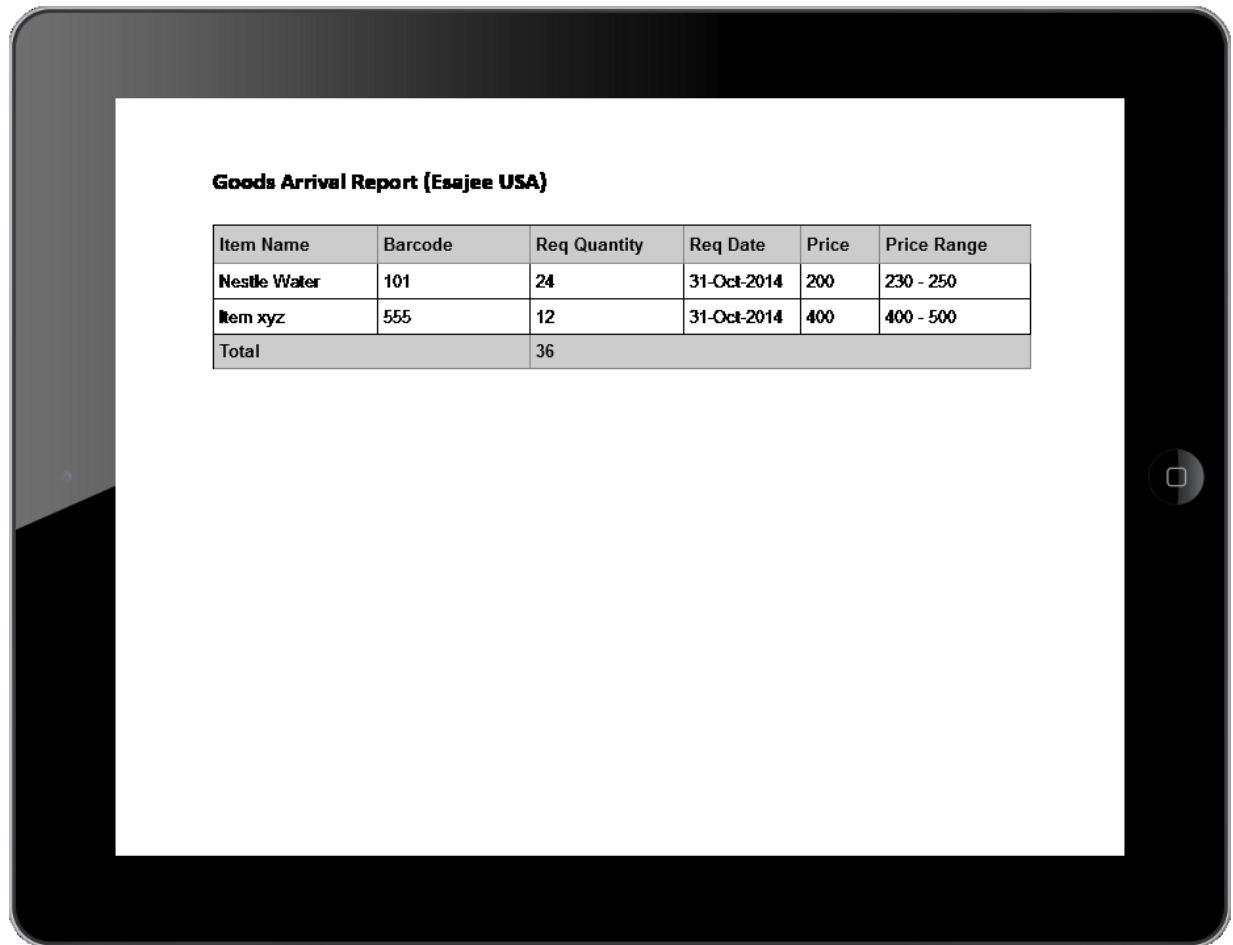
Rs186.00

Cancel

Create

When sales order is packed and a shipper/delivery type is saved, the status of the original purchase requisition and corresponding items will become in transit.

c. *Goods Arrival Report*

A black tablet mockup with a white screen displaying a table titled "Goods Arrival Report (Esajee USA)". The table has six columns: Item Name, Barcode, Req Quantity, Req Date, Price, and Price Range. It contains three data rows and a total row.

Item Name	Barcode	Req Quantity	Req Date	Price	Price Range
Nestle Water	101	24	31-Oct-2014	200	230 - 250
Item xyz	555	12	31-Oct-2014	400	400 - 500
Total		36			

This report will be available to the receiving department of the company requesting items.

d. Material Inspection



Material Inspection

Item Name	Barcode	Qty Requested	Qty Available	Damaged	Damage Type
Nestle Water	101	24	<input type="text" value="20"/>	<input type="text" value="4"/>	Missing ▾
Item xyz	555	12	<input type="text" value="10"/>	<input type="text" value="2"/>	Damaged ▾
Total		36	30	6	

a. This step could be performed at the destination/receiving location

e. Goods Received Note

Goods received noted is a report that confirms that goods sent by the supplier have been received at the destination. This confirms the items sent by the supplier vs the items ordered via Purchase Order. (INVOICE that goes to accounts with reference to supplier PO)

Implementation at Esajee

In case of Esajee, following steps are applicable:

1. Purchase Indent and Finalization (by Esajee & Co)
2. Purchase Requisition (by Esajee & Co)
3. Sales Order (by Esajee USA)

4. Receiving (Esajee & Co)

Additional Settings

1. Locations
2. Payment Terms
3. Price Lists
4. Currencies
5. Taxes
6. Users
7. Reports

These settings are explained the upcoming sections.

1. Locations

Settings > Locations

Primary Location
Salt Lake City UTAH
Primary
Billing

Warehouse Isb
19, Aga Khan Road. F-6/3

Add Location

Add Location:

Settings > Add Location

☒ Holds Stock?

Holds Stock?

If unchecked, the location cannot receive physical stock. E-Commerce sites can be one such example. One location must be marked as Primary/Billing for accounting transactions.

2. Payment Terms

Settings > Payment Terms

Cash on Delivery	Net 10	Net 30
0 days from Invoice Date	Due 10 days from Invoice Date	Due 30 days from End of Month

Add Payment Terms

Settings > Add Payment Terms

Label

Due in [days]

From Invoice Date or Month End

3. Price Lists

Settings > Price Lists

Buy	Wholesale	Retail
Code: BUY	Code: WHL	Code: RTL
Currency: PKR	Currency: PKR	Currency: PKR
Type: Buy	Type: Sell	Type: Sell

Add Price List

Settings > Add Price List

Label

Code

Currency

☒ Cost Price?

4. Currencies

Settings > Currencies

PKR	USD	GBP
ISO: PKR	ISO: USD	ISO: GBP
Symbol: Rs	Symbol: \$	Symbol: £
Default	Rate: 0.0098	Rate: 0.0063

Add New

Add Currency

Settings > Add Currency

Label

ISO

Symbol

1 PKR =

1 USD = 102.0408 PKR

Format: \$987,654.32

Cancel Save

5. Taxes

Settings > Taxes

General Sales Tax	Federal Excise Duty	Tax Exempt
Code: GST	Code: FED	Code: TAXEXEMPT
Rate: 15%	Rate: 10%	Rate: 0%

[Add New](#)

Add Taxes

Settings > Add Tax

Label

Code

☒ Compound? Compound applied after other taxes

Tax Line 1: %

Tax Line 2: %

Tax Line 3: %

Total: 15

[Cancel](#) [Save](#)

6. Users

Settings > Users

Waqar Ahmed waqar@esajeesolutions.com Primary contact	Sabz Ali ali@esajeesolutions.com
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Add New

Add User

Settings > Add User

Waqar Ahmed

waqar@esajeesolutions.com

Change picture No Image

First Name	✕
Last Name	✕
Location	▼
Phone number	✕

Cancel Save

Permissions

Inventory	Read/Write ▼
Relationships	Read Only ▼
Stock	No Access ▼
Settings	No Access ▼
Prices	Accessible ▼

Email Settings

<input checked="" type="checkbox"/> Weekly Sales
<input checked="" type="checkbox"/> Monthly Sales
<input checked="" type="checkbox"/> Closings Daily/Weekly/Monthly/Disabled ▼

7. Reports

Settings > Reports

<input type="text" value="Quote Title"/>	<div>Quote Details</div>
<input type="text" value="Sales Order Title"/>	
<input type="text" value="Invoice Title"/>	
<input type="text" value="Purchase Order Title"/>	<div>Sales Order Details</div>
<input type="text" value="Stock Transfer Title"/>	
<input type="text" value="Shipping Label Title"/>	<div>Invoice Details (e.g. Payment instructions)</div>
<input type="text" value="Shipping Details Title"/>	
<input type="text" value="Packing Slip Title"/>	
<div><input type="button" value="Cancel"/> <input type="button" value="Save"/></div>	

To do:

1. Shipping Costs (taxes are inclusive)

- a. Freight
- b. Clearing
- c. Commission
- d. (manage international expenses in settings)
- e. Distribute Expense percentage among items (just like in start of the stock)

2. Expiries

****The supplier is not Esajee USA instead payment goes to Esajee USA, in this case catering Suppliers / Vendors**

***** Accounts posting mechanism for suppliers**