SALES MANAGEMENT

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PRIMARY SALES
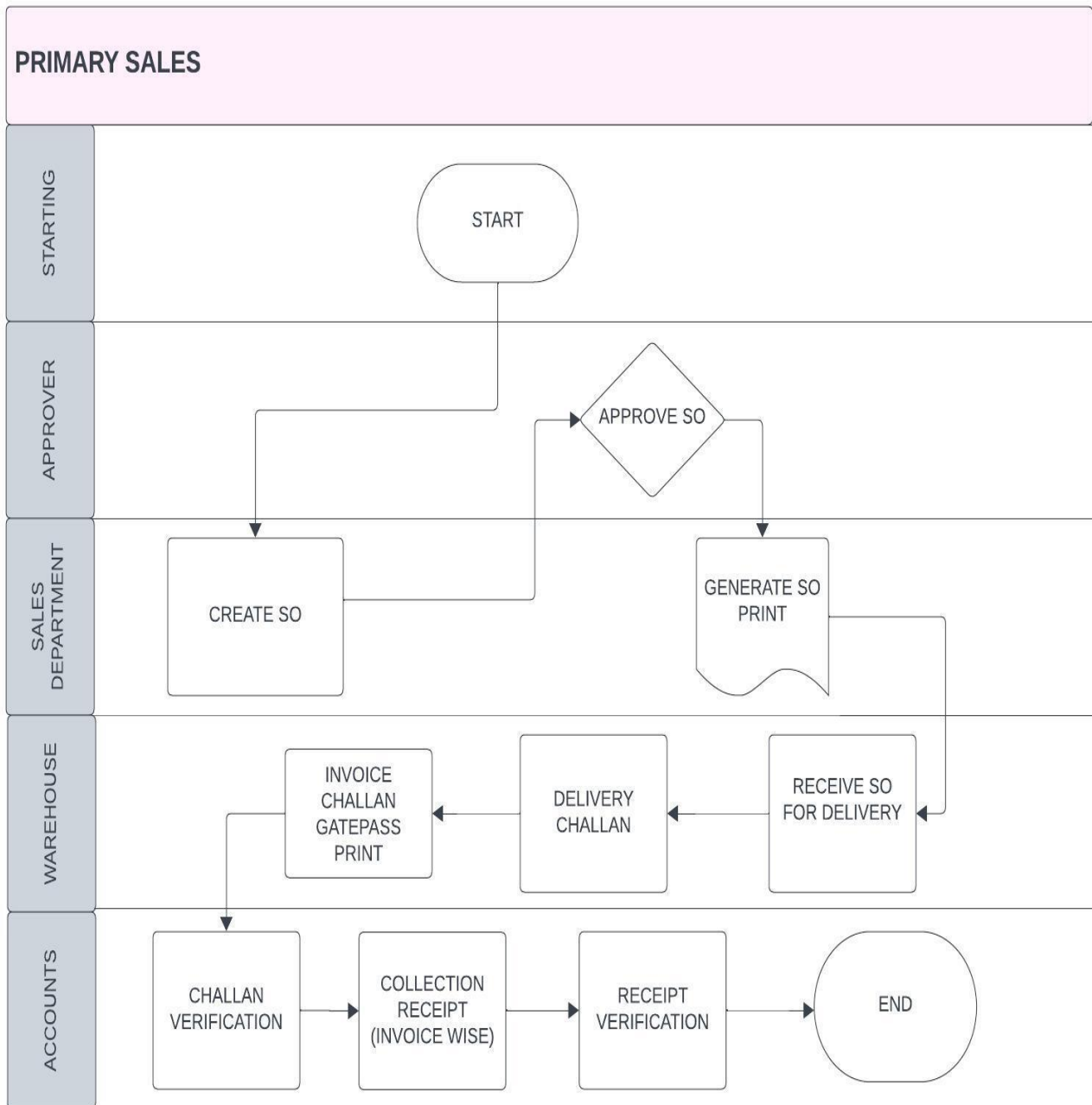
STARTING	START
APPROVER	APPROVE SO
SALES DEPARTMENT	CREATE SO → GENERATE SO PRINT
WAREHOUSE	INVOICE CHALLAN GATEPASS PRINT ← DELIVERY CHALLAN ← RECEIVE SO FOR DELIVERY
ACCOUNTS	CHALLAN VERIFICATION → COLLECTION RECEIPT (INVOICE WISE) → RECEIPT VERIFICATION → END

1. **Territory Setup**:
   - This step involves defining territories, such as "REZION," "ZONE," and "TERRITORY."
   - These territories help organize sales operations and assign sales representatives to specific regions.

2. **Bonus Policy**:
   - Total Four (4) types of Bonus.
       1. Flat Bonus
       2. Cash Bonus
       3. Yearly Bonus
       4. Item Bonus
   - Flat Bonus will be same for every SO and Customer.
   - If Invoice amount received within 10 days, 10% of cash bonus will be applied based on invoice amount.
   - If Invoice amount received within 30 days, 5% of cash bonus will be applied based on invoice amount.
   - 7% Bonus based on Invoice Amount will be availed in Closing.
   - Item Bonus will be given to Customer in Money Receive time.

3. **Promotional Offer Setup**:
   - Define trade offers, promotions offer.
   - These offers can be applied during the sales process.

4. **Customer Setup**:
   - Dynamic Customer Category Management. Regular Dealer, Recovery Dealer, Bad Debs Dealer, Corporate Dealer, Or Any Other Category.
   - Create customer profiles in the system.
   - These profiles include information about customers, such as contact details and preferences.

5. **Price Setup**:
   - Define price setup for Sales Order.
   - These Price can be applied during the sales process.

6. **Sales Order (SO) Generation**:
   - Sales Order will generate in Depot by Depot Officer.
   - 6% flat Discount will be carry for every order.
   - Two Types of Sales offer
     1. Sales Type One (1)
        1. Cash
        2. Credit
     2. Sales Type Two (2)
        1. Regular Sales
        2. Seasonal Sales
        3. Corporate Sales
   - If Credit Limit is applicable for any Customer, Sales order will check the Limit. If the limit exceeds, Order will not Proceed.

7. **Approval Process**:
   - One Approval Layer Active for Sales Order.

8. **Distribution and Delivery**:
   - Sales Order will be Deliver from Depot.
   - Delivery challan print copy, Invoice print copy, Gate Pass print copy are created for product dispatch.

9. **Accounts Verification**:
   - Accounts will Verify the Challan.

10. **Money Receipt**:
    - Depot Accounts will receive money based on Invoice, and upload money receipt copy as attachment
    - Money Receipt copy can be uploaded after Money Receive.
    - When the Depot officers upload money receipt copy and confirm, then this transaction will forward to Head Office Accounts.

- o Head Office Accounts Will Approve This Receive Transaction and then it will hit on Ledger.