**ERP Ribbon Tab Draft (Comprehensive Version)**

**Dashboard**

* **Home:** KPIs, Recent Activity, Shortcuts, Notifications, Alerts
* **Tasks/Approvals:** Pending Approvals, To-Dos
* **Reminders:** Overdue Invoices, Expiring Inventory, Payroll Due

**What Needs to Be Done in the Dashboard**

**1. Core Visuals & KPIs**

* **Financial KPIs:** Show real-time values for:
  + Total Sales (today, month, YTD)
  + Gross Profit, Net Profit
  + Expenses
  + Cash/Bank Balance
  + Accounts Receivable (AR) and Accounts Payable (AP)
* **Quick Stats:**
  + Items Sold Today
  + Invoices Due Today/Overdue
  + Bills to Pay
  + Payroll/Salary Due

**2. Data Visualizations**

* **Sales Trend Graphs:** Daily/monthly sales vs. target, profit/loss charts
* **Top Products/Customers:** Pie or bar chart
* **Expense Distribution:** Pie chart for expenses by category
* **Stock Alerts:** Bar/indicator for low-stock/out-of-stock items

**3. Alerts & Notifications**

* **Overdue Invoices/Bills:** Show red/yellow icons for urgent financial tasks
* **Low Stock Alerts:** List or highlight products needing restock
* **Approvals Needed:** Pending orders, bills, timesheets, etc.
* **Reminders:** Payroll due dates, tax deadlines

**4. Shortcuts/Quick Actions**

* **Quick Links:** Buttons for most common actions:
  + New Sales Order, Invoice, Purchase Order, Bill
  + Receive Payment, Pay Bill
  + Run Payroll
  + Add Product/Customer/Vendor
* **Search Box:** Search across records (customers, products, invoices, etc.)

**5. Customizability & User Personalization**

* **Personalized Widgets:** Let users add, remove, or rearrange widgets (KPIs, lists, etc.)
* **Role-Based Display:** Show more HR/payroll widgets for HR users, finance KPIs for accountants, etc.

**6. Activity Feed or Recent Transactions**

* **Recent Activity:** List of last actions (e.g., “Invoice #123 paid”, “Stock adjusted”)
* **Who’s Online / Recent Logins:** (optional)

**7. Navigation Support**

* **Favorites/Recents:** List user’s favorite or most recent modules/records
* **Guided Tour/Help:** First time? Offer a quick system tour or help popup

**Sales**

* **Orders:** New Sales Order (split: Standard, Quote, Return), List Orders, Approve/Cancel, Import Orders
* **Invoices:** New Invoice, List Invoices, Print, Email, Export, Manage Invoice Types
* **Shipments/Delivery:** New Shipment, List Shipments, Print Delivery Receipt
* **Customers:** New Customer, List Customers, Manage Customer Types
* **Payments:** Receive Payment, List Payments, Sales Receipt, Payment Types
* **Sales Settings:** Sales Types, Shipment Types

**What Needs to Be Done in the Sales Module**

**1. Sales Order Management**

* **New Sales Order** button: Opens a form for entering new sales orders.
  + Select Customer (searchable dropdown or quick-add)
  + Add products/services (with qty, price, discount)
  + Set order date, delivery date, reference
  + Auto-calculate totals, taxes, etc.
  + Save/Draft/Submit/Approve as per your workflow
* **List Sales Orders:** View all orders with filter/search (date, status, customer, etc.)
  + Edit, Approve, Cancel, Copy, Print, Export

**2. Invoicing**

* **New Invoice:** Direct invoice (no order) or generate from an approved sales order.
  + Fill customer & product details, auto-pull from order if needed
  + Support for partial invoices (if you allow partial delivery)
  + Calculate totals, apply taxes, print/email invoice
* **List Invoices:** All invoices with search/filter (status, overdue, customer, date)
  + Print, Email, Export, Mark as Paid/Unpaid, Apply Credit Note, View Statement

**3. Payments**

* **Receive Payment:** Allocate payments against one or more invoices.
  + Select customer, choose invoice(s), input amount, date, payment type/method (cash, bank, etc.)
  + Allow over/underpayment, advance payment, and note outstanding balances
  + Print or email payment receipt

**4. Customer Management**

* **New Customer:** Add, edit, search for customers.
  + Store details (contact, email, address, type, notes)
  + View customer ledger/history
  + Assign special terms/pricing (if needed)

**5. Shipments/Delivery**

* **New Shipment/Delivery:** For physical goods, create and track delivery notes/receipts.
  + Link to sales order/invoice
  + Track status (pending, shipped, delivered)
* **List Shipments:** Searchable, filterable list, with print/email delivery receipt

**6. Returns/Credit Notes (if needed)**

* **New Return:** Process sales returns or refunds, adjust stock and customer balance.
* **Credit Note:** Create credit notes for overpayments, returns, or corrections.

**7. Sales Settings**

* **Manage Sales Types, Payment Types, Shipment Types**
  + Useful for workflow and reporting

**8. Sales Reporting**

* **Sales Register:** List of all sales/invoices, filterable by period, customer, etc.
* **Top Selling Products:** Analytics chart/table
* **A/R Aging Report:** List of unpaid/overdue invoices by customer and age bucket
* **Sales by Salesperson/Branch:** (if tracked)

**9. Shortcuts/Quick Actions**

* At the top: Shortcuts for “New Order”, “New Invoice”, “Receive Payment”, “Customer List”, “Print/Export”, “Overdue Invoices”

**Purchasing**

* **Orders:** New Purchase Order, List Orders, Approve/Cancel, Import Orders
* **Bills/Vouchers:** New Bill, List Bills, Pay Bill, Bill Approval, Print/Export, Manage Bill Types
* **Vendors:** New Vendor, List Vendors, Manage Vendor Types
* **Goods Receipt:** New GRN (Goods Received Note), List GRN, Print
* **Purchasing Settings:** Purchase Types, Invoice Types

**What Needs to Be Done in the Purchasing Module**

**1. Purchase Order Management**

* **New Purchase Order:**
  + Button opens a form for entering a new purchase order (PO).
  + **Fields:** Vendor (searchable/add), products/services (with qty, cost, discount), branch/warehouse, order date, delivery date, remarks, etc.
  + **Actions:** Save/Draft/Submit/Approve (based on workflow).
* **List Purchase Orders:**
  + Filter/search by date, vendor, status, branch, etc.
  + Actions: Edit, Approve/Cancel, Print, Export, Copy, Import, View status.

**2. Bill/Voucher Management**

* **New Bill/Voucher:**
  + Create bills directly, or from a PO/GRN.
  + Link to received goods, input invoice number, due date, terms, tax, etc.
  + Actions: Save/Submit, Print, Email, Export.
* **List Bills/Vouchers:**
  + All bills, filter/search, pay/unpay, export, print.

**3. Goods Received Note (GRN) / Delivery**

* **New GRN:**
  + For recording goods receipt against PO.
  + Link to PO, input received quantity, quality check, date, warehouse.
  + Actions: Save, Print GRN, Approve if required.
* **List GRNs:**
  + Searchable, link back to PO, export, print.

**4. Vendor Management**

* **New Vendor:**
  + Add new vendors with full details (contact, address, type, terms, etc.).
* **List Vendors:**
  + Search/filter, edit, print, export.
* **Manage Vendor Types:**
  + Button for master data management (local, international, service, etc.)

**5. Payment to Vendor**

* **Pay Bill:**
  + Allocate payment to bills; select payment type/method (cash, check, bank transfer).
  + Allow partial payment, overpayment, or prepayments.
  + Generate/print payment voucher or acknowledgment.
* **List Payments:**
  + Searchable, filter by vendor/date/status.

**6. Approvals**

* **Approval Workflow:**
  + Buttons for Approve/Reject PO, Bills, GRN (if required by company policy).
* **Pending Approvals:**
  + Shortcut/group for all pending documents needing attention.

**7. Purchasing Settings**

* **Purchase Types:**
  + Manage different purchase order types (local, import, services, etc.)
* **Bill Types/Invoice Types:**
  + Manage master data for billing/document types.
* **Payment Types:**
  + Manage accepted payment modes for vendor payments.

**8. Purchasing Reporting**

* **Purchases Register:**
  + All purchases for selected periods, by vendor, branch, etc.
* **AP Aging Report:**
  + List unpaid/overdue bills by vendor and aging bucket.
* **Top Vendors/Items:**
  + Pie/bar charts.
* **GRN Report:**
  + Received but not yet billed, open POs.

**9. Stock/Inventory Link**

* **Update Stock:**
  + Stock received through GRN should update inventory balances automatically.
* **Outstanding Orders:**
  + List of open purchase orders, overdue deliveries.

**10. Shortcuts/Quick Actions**

* **Buttons for “New PO”, “New Bill”, “New Vendor”, “Pay Bill”, “GRN”, etc.**
* “Print”, “Export”, and “Import” options for every main list.

**Inventory**

* **Products/Services:** New Product, List Products, Adjust Stock, Manage Product Types, Brand, Color, Size
* **Stock Operations:** Stock-In, Stock-Out, Transfers, Stock Monitoring (Low Stock, Out-of-Stock)
* **Warehouses:** New Warehouse, List Warehouses
* **Branches:** New Branch, List Branches
* **Units:** Manage Units of Measure
* **Inventory Settings:** Categories, Valuation Methods

**What Needs to Be Done in the Inventory Module**

**1. Product/Service Management**

* **Add New Product/Service:**
  + Form to enter product/service details: name, code/barcode, description, product type, brand, color, size, unit of measure, default prices, reorder level, assigned branch/warehouse, etc.
* **List Products/Services:**
  + Search, filter (by category, branch, status), edit, deactivate/activate, delete.
* **Adjust Product Details:**
  + Edit price, unit, attributes; update status (active/discontinued).
* **Product Master Data Management:**
  + Manage product types, brands, units, categories.

**2. Stock Management & Monitoring**

* **Stock-In:**
  + Record new stock receipts (linked to purchase/GRN or standalone).
  + Assign to branch/warehouse, enter quantity, cost, supplier, date.
* **Stock-Out:**
  + Record stock removals (linked to sales, usage, wastage, or manual adjustment).
  + Select reason/type (sale, damage, transfer, etc.).
* **Stock Transfer:**
  + Move stock between warehouses/branches.
  + Select source and destination, adjust quantities.
* **Stock Adjustment:**
  + For correcting stock levels due to audits, cycle counts, or errors.
  + Enter adjustment reason, supporting document/photo if needed.

**3. Stock Monitoring & Alerts**

* **Stock Levels View:**
  + List all items with current on-hand quantity by warehouse/branch.
* **Low Stock/Out-of-Stock Alerts:**
  + Highlight or notify when below reorder level or out-of-stock.
  + Filter/view all critical items.
* **Expiring/Obsolete Inventory Alerts** (if relevant):
  + Show items near expiration or not sold/moved for a long time.

**4. Warehousing & Locations**

* **Warehouse Management:**
  + Add/edit/delete warehouses, assign to branch.
  + View list of all warehouses with location and capacity.
* **Branch Management:**
  + Add/edit branches, assign products, manage separate stock.

**5. Units & Classification**

* **Unit of Measure Management:**
  + Add/edit units (piece, box, kg, liter, etc.)
* **Product Classification:**
  + Add/edit product types, brands, color, size, categories for filtering/reporting.

**6. Inventory Reports & Analysis**

* **Inventory Valuation Report:**
  + Calculate value of stock on hand (by cost, retail, FIFO, etc.)
* **Stock Movement/History Report:**
  + Track all in/out/transfer actions per item and location.
* **Inventory Aging Report:**
  + Items not sold/moved in X days/months.
* **Stock Status Report:**
  + On-hand, reserved, available, committed, etc.

**7. Integration with Other Modules**

* **Purchasing:**
  + Stock-in linked to Purchase Order/GRN.
* **Sales:**
  + Stock-out linked to Sales Order/Invoice/Delivery.
* **Accounting:**
  + Stock adjustments, inventory valuation updates, and cost of goods sold (COGS) entries post to the ledger.

**8. Shortcuts & Quick Actions**

* **Add Product/Service**
* **Stock-In/Stock-Out**
* **Transfer Stock**
* **View Low Stock**
* **Inventory Reports**
* **Print/Export Inventory Lists**
* **Barcode/Label Printing** (if supported)

**Banking/Finance**

* **Cash/Bank:** New Transaction, List Accounts, Reconcile, Import Bank Statement, Bank Feeds
* **Journal Entry:** New Entry, List Entries, Reverse/Correct Entry
* **Chart of Accounts:** View/Edit COA, Import/Export
* **Budgets:** Set Budget, View Budgets
* **Financial Types:** Manage Payment, Invoice, Bill Types

**What Needs to Be Done in the Banking Module**

**1. Cash & Bank Account Management**

* **Add/Edit/Delete Cash or Bank Accounts:**
  + Form to set up and manage bank/cash accounts (name, type, account number, branch, initial balance, description).
  + List/search all accounts with current balance and status (active/closed).
* **View Account Register/Ledger:**
  + See all transactions for a given account (deposits, withdrawals, transfers, reconciliations, payments, receipts).

**2. Bank & Cash Transactions**

* **New Transaction:**
  + Record deposits, withdrawals, bank charges, interest, etc.
  + Select account, date, amount, type, description, and link to customer/vendor/document if applicable.
* **Transfers:**
  + Move funds between cash/bank accounts (e.g., from Cash-on-hand to BDO Savings).
  + Form should ensure transfer is reflected in both source and destination ledgers.
* **Payments/Receipts:**
  + Allocate vendor/customer payments from/to a bank account (integrated with Pay Bill/Receive Payment workflows in Purchasing/Sales).

**3. Bank Reconciliation**

* **Bank Reconciliation Workflow:**
  + Select account and statement period.
  + Match system transactions with bank statement (check/uncheck as reconciled).
  + View unreconciled transactions, enter bank-only transactions (interest, fees, etc.).
  + Mark period as “Reconciled”; view/print reconciliation report.
* **Bank Statement Import:**
  + Import electronic bank statements (CSV, Excel, or via API integration if supported).
  + Auto-match with system entries, highlight discrepancies.

**4. Cheque Management (if needed)**

* **Issue Cheques:**
  + Track issued, post-dated, cleared, and bounced cheques.
* **Cheque Register:**
  + List all cheques with statuses.

**5. Cash Flow & Analysis**

* **Cash Flow Report:**
  + Inflows and outflows by date, source, or category.
* **Bank Balance Summary:**
  + All accounts and balances at a glance.

**6. Integrations**

* **Posting to Ledger:**
  + All bank/cash transactions should create corresponding LedgerEntry records in accounting.
* **Linked Payments:**
  + Payments and receipts link to invoices, bills, payroll, etc.

**7. Shortcuts/Quick Actions**

* **Add Bank Account**
* **New Deposit**
* **New Withdrawal**
* **Transfer Funds**
* **Reconcile Account**
* **Print/Export Account Register**
* **Import Bank Statement**

**Payroll**

* **Employees:** New Employee, List Employees
* **Attendance:** Record/View Attendance, Import Attendance
* **Allowances/Benefits:** New Allowance/Benefit, List All, Manage Benefit Types
* **Deductions/Contributions:** New Deduction, List All, Manage Contribution Types
* **Payroll Run:** Process Payroll, List Runs, Post to Ledger, Reverse Payroll
* **Payslips:** Generate/Print Payslips, Email Payslips
* **Tax:** Manage Tax Tables, Tax Reports
* **HR Settings:** Departments, Job Positions, Shifts, Leave Types, Leave Management

**What Needs to Be Done in the Payroll Module**

**1. Employee Management**

* **Add/Edit Employee:**
  + Full employee profile (personal details, job position, department, contact, hire date, salary/rate, tax ID, payment details, etc.)
  + Assign department, job position, branch, shift.
* **Employee List:**
  + Search, filter, and view employment status, history, and summary.
* **Employment Actions:**
  + Resignation, termination, promotion, transfer, etc.

**2. Attendance & Timekeeping**

* **Record/View Attendance:**
  + Daily time-in/out, overtime, absences, leaves, rest days, holidays.
  + Import attendance from biometric devices, spreadsheets, or manual entry.
* **Leave Management:**
  + Apply, approve, and track leaves (vacation, sick, etc.)
* **Shift Scheduling:**
  + Assign/edit shifts, view shift rosters.

**3. Allowances & Benefits**

* **Manage Allowances/Benefits:**
  + Add various allowances (transport, meal, etc.) per employee or group.
  + Set eligibility, period, and computation rules.
* **Benefit Types:**
  + Manage master data for benefit categories.

**4. Deductions & Contributions**

* **Manage Deductions:**
  + Tax, government contributions (SSS, PhilHealth, Pag-ibig), loans, advances, late/absence deductions.
* **Contribution Types:**
  + Manage and update contribution tables/rates as per government policy.
* **Loan Management:**
  + Set up, deduct, and track employee loans (optional).

**5. Payroll Processing**

* **Payroll Run/Generate Payroll:**
  + Select pay period, group (e.g., all employees, department, branch).
  + Review computed gross pay, allowances, deductions, net pay per employee.
  + Approve or reject run, lock/unlock periods.
* **Payslip Generation:**
  + Generate payslips (for all or selected employees), print/email/download.
  + Payslip view includes breakdown (earnings, deductions, net pay).

**6. Posting to Accounting**

* **Post Payroll to Ledger:**
  + When payroll is approved, auto-generate journal entries for salaries, deductions, payables, etc.
  + View posting status/history.
* **Reverse/Correct Payroll:**
  + Allow reversal or correction of payroll runs (admin only), with full audit trail.

**7. Tax Management & Compliance**

* **Tax Table Management:**
  + Maintain and update tax brackets/rates.
* **Tax Reports:**
  + Generate and export government compliance reports (BIR, SSS, PhilHealth, Pag-ibig, etc.).
* **Year-End/Annualization:**
  + Annual tax computation and reporting (optional, advanced).

**8. Reporting & Analytics**

* **Payroll Register:**
  + All payroll runs, filterable by period, branch, etc.
* **Contribution/Deduction Reports:**
  + Summary per employee or per government agency.
* **Cost Allocation Reports:**
  + Payroll cost by department, project, branch.
* **Payslip Summary:**
  + List and view payslip details for auditing.

**9. Shortcuts & Quick Actions**

* **Add Employee**
* **Run Payroll**
* **View Payslips**
* **Add Allowance/Deduction**
* **Process Leave**
* **Export Payroll Data**
* **Print Government Reports**

**Projects**

* **Projects:** New Project, List Projects, Allocate Resources, Assign Tasks/Subprojects, Project Reports

**What Needs to Be Done in the Project Module**

**1. Project Management**

* **Add/Edit Project:**
  + Enter and update project details: name, description, start/end date, status, branch/department, project manager, client (if applicable).
  + Assign unique project codes or references.
* **Project List:**
  + List/search/filter all projects, by status, branch, customer/client, or project manager.
  + Edit, deactivate, archive, or delete projects as appropriate.

**2. Resource Allocation**

* **Assign Resources:**
  + Allocate employees, equipment, or materials to projects.
  + Set roles (e.g., team leader, engineer, worker) and time allocation (full/part-time, specific shifts).
* **View Resource Schedule:**
  + Calendar or timeline of who/what is assigned where and when.
* **Project Team:**
  + View and manage project teams and roles.

**3. Budgeting and Cost Tracking**

* **Set Project Budgets:**
  + Set total and category-specific budgets (labor, materials, expenses, etc.).
  + Edit/review budgets as the project progresses.
* **Expense Tracking:**
  + Link purchases, bills, and other costs to the project.
  + Show actual vs. budgeted spend.
* **Progress Billing (if applicable):**
  + For client projects, invoice by milestone or completion %.

**4. Task & Milestone Management (optional/advanced)**

* **Task/Activity Breakdown:**
  + Add, assign, and schedule project tasks or phases.
  + Set deadlines, dependencies, and responsible personnel.
* **Milestone Tracking:**
  + Mark major project milestones and deadlines.
* **Task Progress/Status:**
  + Mark tasks as not started, in progress, completed, delayed, etc.

**5. Integration with Other Modules**

* **Purchasing:**
  + Assign PO, bills, GRN, and expenses directly to a project.
* **Payroll:**
  + Allocate payroll/labor costs to specific projects (via timesheets, attendance, or manual assignment).
* **Inventory:**
  + Track usage/consumption of stock per project.
* **Accounting:**
  + Ensure all project-related costs, billings, and revenues are linked for true project profitability analysis.

**6. Reporting & Analysis**

* **Project Cost Report:**
  + Budget vs. Actual, by category and overall.
* **Project Progress Report:**
  + % complete, milestones achieved, remaining tasks.
* **Resource Utilization Report:**
  + Labor hours, equipment usage.
* **Profitability/Variance Report:**
  + For projects with revenue: income, costs, net margin.
* **Project Register:**
  + All projects summary with status, cost, and performance indicators.

**7. Shortcuts/Quick Actions**

* **New Project**
* **Assign Resources**
* **Set/Edit Budget**
* **Add Project Expense**
* **View Reports**
* **Archive/Complete Project**
* **Print/Export Project Data**

**Reports**

* **Financial Reports:** Balance Sheet, Income Statement, Trial Balance, Cash Flow, Budgets vs. Actuals, Audit Log
* **Sales Reports:** Sales Reports, Top Products, Customer Statements, AR Aging
* **Purchasing Reports:** Purchase Reports, Vendor Statements, AP Aging
* **Inventory Reports:** Inventory Valuation, Stock Status, Low/Out-of-Stock, Movement History
* **Payroll Reports:** Payroll Summaries, Contribution/Tax Reports, Employee Payslip Summary
* **Project Reports:** Costing, Progress, Resource Utilization
* **Export/Print:** Export All, Print All

**What Needs to Be Done in the Reports Module**

**1. Organize Reports by Category**

* **Financial Reports:**
  + **Balance Sheet** (Assets, Liabilities, Equity at a point in time)
  + **Income Statement / Profit & Loss** (Revenues, Expenses, Net Profit over a period)
  + **Trial Balance**
  + **Cash Flow Statement**
  + **Budgets vs. Actuals**
  + **General Ledger** (account-level details)
  + **Audit Log** (user/system actions, changes)
* **Sales Reports:**
  + **Sales Register** (list of all sales)
  + **Top Products/Customers**
  + **A/R Aging Report** (unpaid invoices by age bucket)
  + **Customer Statements** (activity, balances)
  + **Sales by Salesperson/Branch/Project**
* **Purchasing Reports:**
  + **Purchases Register** (all bills/purchases)
  + **A/P Aging Report** (unpaid bills by age bucket)
  + **Vendor Statements**
  + **Top Vendors/Items**
* **Inventory Reports:**
  + **Inventory Valuation** (by cost/retail/FIFO)
  + **Stock Status** (on-hand, reserved, committed, out-of-stock)
  + **Stock Movement/History**
  + **Inventory Aging** (slow-moving/obsolete)
  + **Low Stock/Expiry Alerts**
* **Payroll Reports:**
  + **Payroll Register** (by period, employee, department)
  + **Payslip Summary**
  + **Contribution/Deduction Reports** (SSS, PhilHealth, Pag-ibig, taxes, loans)
  + **Cost Allocation** (payroll by department/project)
* **Project Reports:**
  + **Project Costing** (budget vs. actual, by cost type)
  + **Progress/Milestones**
  + **Resource Utilization**
  + **Project Profitability**

**2. Flexible Report Filters & Parameters**

* Date range, period (month, quarter, year)
* Branch, warehouse, project, department
* Customer/vendor, product/service, status
* Show/hide inactive/archived data
* Drill-down to detail (e.g., from summary to source transaction)

**3. Interactive & Exportable Reports**

* **View/Print:**
  + Well-formatted, paginated views for printing
* **Export:**
  + Export to Excel, PDF, CSV, or XML
* **Email Report:**
  + Send directly from system (with optional PDF/Excel attachment)
* **Charts/Graphs:**
  + Add pie, bar, line graphs for trend/analysis reports

**4. Quick Navigation/Shortcuts**

* **Favorites:**
  + Mark most-used reports for one-click access
* **Recent Reports:**
  + Easy navigation to last-viewed or scheduled reports

**5. Scheduled/Automated Reports (optional/advanced)**

* Let users schedule reports to run automatically and be emailed/exported at set intervals (daily, weekly, monthly).

**6. Security & Permissions**

* **Restrict sensitive reports** (financial, payroll, audit logs) to authorized roles only.
* **User activity audit log**: Who viewed/exported what report.

**Admin / Settings**

* **Users:** Manage Users, Roles, Permissions
* **Master Data:** Manage all master lists (types, units, categories, statuses)
* **System Settings:** Preferences, Fiscal Period, Numbering, Backups, Data Import/Export
* **Audit Logs:** View System Logs, User Activity
* **Period Management:** Close/Open Fiscal Period, Period Locking

**Special Split Buttons / Menus**

* **“New ...”** (Order, Invoice, Bill, etc.) with split for subtypes (Standard, Quote, Return, etc.)
* **Import/Export** buttons throughout, grouped under “More” where needed
* **Approval** (for managers/admin only) with split for different document types