

Transol VMS - Project Guide

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1. Introduction

Welcome to the **Transol Vendor Management System (VMS)**. This application is designed to streamline the process of managing sales invoices, delivery challans, transport charges, and document generation for Transol Digital Solutions.

The system allows you to create invoices, manage master data (like Items, Buyers, and Locations), and generate professional PDF documents for your clients.

2. Key Features

- **Dashboard:** A comprehensive view of recent invoices, status distribution, and key metrics.
- **Invoice Management:** Create, edit, and track the lifecycle of invoices from Draft to Finalized.
- **Document Bundling:** Automatically generate Delivery Challans (DC) and Transport Charge slips linked to invoices.
- **PDF Generation:** Generate confirmed PDF bundles including POs and Approval emails.
- **Master Data Management:** Easy interfaces to manage Buyers, Store Locations, and Items inventory.
- **Trash/Restore:** Soft delete functionality to prevent accidental data loss.

3. Workflows

3.1 Creating a New Invoice

- 1 Navigate to **Create New > New Invoice** in the top menu.
- 2 **Buyer & Location:** Select the 'Buyer' (Bill To) and 'Location' (Ship To). Use the '+' button to add new ones if needed.
- 3 **Invoice Details:** Fill in Payment Terms, Reference No, etc.
- 4 **Add Items:** Click 'Add Item', select product, enter quantity, and save.
- 5 **Save Invoice:** Click 'Save' to create the draft.

3.2 Generating Delivery Challan (DC)

- 1 Go to the Invoice List or Detail page.
- 2 Select **View/Edit DC**.
- 3 Review details and add notes.
- 4 Save to generate the DC.

3.3 Adding Transport Charges

- 1 From the Invoice Detail page, select **Transport Charges**.
- 2 Enter transport cost and description.
- 3 Save.

3.4 Finalizing & Generating PDF

- 1 Navigate to the **Confirmation / Finalize** section.
- 2 **Upload Documents:** Upload Client PO and Approval Email PDFs.
- 3 **Packed Images:** Upload images of packed goods.
- 4 Click **Finalize & Generate PDF**.

4. Managing Data

4.1 Items Inventory

Go to **Data > Items Inventory** to view, add, or edit products/materials.

4.2 Buyers & Locations

Go to **Data > Buyer List** or **Client Locations** to manage billing and shipping entities.

5. Search & Filters

All list pages include a global search bar. You can search by Invoice Number, Buyer Name, Location, etc.

6. Support

For technical issues, please contact the system administrator.

Generated by Transol VMS