

Customer Relationship Management

1. Product Details
 - A. Product Head
 - a. Code – Manual Entry
 - b. Product Head
 - c. Save
 - B. Product
 - a. Code – Manual entry
 - b. Product Details
 - c. Product Head – Drop Down List
 - d. Save
2. Customer Creation
 - A. Customer Details
 - a. Customer Name
 - b. Account ID (Linked with GL)
 - c. Post Box
 - d. Telephone
 - e. Fax
 - f. Email
 - g. Credit Term
 - h. Credit Period (Days)
 - i. Credit Limit
 - j. GL Account Type – Drop Down List
 - B. Contact Details
 - a. Contact Person 1
 - b. Designation
 - c. Mobile
 - d. Email
 - e. Contact Person 2
 - f. Designation
 - g. Mobile
 - h. Email
 - i. Need to add more contact persons as per requirement
 - C. Official Documents

- a. CR Number
- b. Expiry Date (Notification required on expiry & send mail to customer)
- c. Attach CR
- d. Establishment Card No
- e. Expiry Date (Notification required on expiry & send mail to customer)
- f. Attach Establishment Card
- g. Authorized Signatory Name
- h. ID Card Number
- i. ID Card Expiry (Notification required on expiry & send mail to customer)
- j. Attach ID Card
- k. Save

3. Enquiry

A. Enquiry details (Form)

- a. Enquiry Number – Auto
- b. Date
- c. Customer – Drop Down List
- d. Contact Person – Drop Down List
- e. Sales Executive – Drop Down List
- f. Validity
- g. Project
- h. Enquiry Reference
- i. Assigned to (Select employee from drop down list and that employees must see the assigned enquiry on his dashboard)

B. Product Details (Table)

- a. Serial No.
- b. Product Description – Drop Down List
- c. Unit
- d. Quantity

4. Sales Quotation

C. Quotation Details (Form)

- a. Quotation Number – Auto
- b. Date
- c. Customer – Drop Down List / Autofill
- d. Contact Person – Drop Down List / Autofill
- e. Sales Executive – Drop Down List / Autofill
- f. Payment Term – Auto Fill

- g. Delivery Terms – Drop Down List
- h. Validity
- i. Project - Autofill
- j. Enquiry Reference - Autofill

D. Product Details (Table)

- e. Serial No.
- f. Product Description – Drop Down List
- g. Unit
- h. Quantity
- i. Rate
- j. Discount (%)
- k. Amount

E. Cost Calculation

- a. Material / Services
- b. Qty
- c. Rate
- d. Amount
- e. Cost of Sales
- f. % of Gross profit

F. Save / Print

5. Sales Order

A. Sales Order Details (Form)

- a. Sales Order No. – Auto
- b. Date
- c. Customer – Drop Down List
- d. LPO reference (Editable even after delivery & invoiced)
- e. Quotation Ref – Drop Down List (Following 7 fields should fill automatically once quotation number is selected)
- f. Contact Person – Drop Down List
- g. Sales Executive – Drop Down List
- h. Payment Terms – Auto Fill
- i. Delivery Terms – Drop Down List
- j. Project

B. Product Details (Tables) Following fields should fill automatically once quotation number is selected)

- a. Serial No.

- b. Product Description – Drop Down List
- c. Unit
- d. Quantity (Editable even after delivery)
- e. Rate (Editable after delivery)
- f. Discount (%)
- g. Amount
- h. Amount in words

C. Save / Print

- a. Attach LPO & Drawings
- b. Scheduled date of delivery (require notification if delivery date expired)

6. Pro-forma Invoice

A. Pro-forma Invoice Details (Form)

- a. Pro-forma Invoice Number – Auto
- b. Date
- c. Customer – Drop Down List
- d. LPO reference
- e. Sales Order No – Drop Down List (Following 7 fields should fill automatically once Sales Order number is selected)
- f. Contact Person – Drop Down List
- g. Sales Executive – Drop Down List
- h. Payment Terms – Auto Fill
- i. Delivery Terms – Drop Down List
- j. Project

B. Product Details (Tables) Following fields should fill automatically once Sales Order number is selected)

C. Serial No.

D. Product Description – Drop Down List

E. Unit

F. Quantity

G. Rate

H. Discount (%)

I. Amount

J. Current Claim

K. Amount in words

L. Print / Save (Not linked with GL)

7. Delivery Note / Cash Invoice

A. Delivery Note (Form)

- a. Delivery Note No. – Auto
- b. Date
- k. Customer – Drop Down List
- c. Sales Order Number – Drop Down List, list only sales orders which are not delivered (Following fields should fill automatically once sales order number selected)
- d. LPO Reference
- e. Contact Person
- f. Project
- g. Table Starts from here
- h. Serial No.
- i. Product Description
- j. Unit
- k. Quantity (Editable, should not exceed order quantity)
- l. Print / Save
- m. Attach Signed delivery note

B. Cash Invoice (Form)

- a. Cash Invoice No. – Auto
- b. Date
- c. Customer Name – Drop Down List
- d. Sales Account – Drop Down List
- e. Sales Order Number – Drop Down List, list only sales orders which are not delivered (Following fields should fill automatically once sales order number selected)
- f. LPO Reference
- g. Contact Person
- h. Project
- i. Customer Name (Drop Down list, not related to GL, just for printing purpose)
- j. Table Starts from here
- k. Serial No.
- l. Product Description
- m. Unit
- n. Order Quantity
- o. Quantity (Editable, should not exceed order quantity)
- p. Rate
- q. Discount (%)
- r. Amount

- s. Print Save
- t. Update Cash invoice status, Drop down list (Paid, Submitted, Not submitted)
- u. Attach signed Cash invoice

8. Credit Invoice (Form)

- a. Invoice No. – Auto
- b. Date
- c. Customer – Drop Down List
- d. Sales Account – Drop Down List
- e. Delivery Note No. – Drop Down List, list only delivery notes which are not invoiced filtered by selected customer (Following fields should fill automatically once delivery note number selected), must be able to select more than one Delivery Note from same sales order.
- f. LPO reference
- g. Contact Person
- h. Sales Order No.
- i. Payment Term
- j. Project
- k. Tables Starts from here
- l. Serial No.
- m. Delivery Note No.
- n. Product Details
- o. Unit
- p. Quantity
- q. Rate
- r. Discount (%)
- s. Amount
- t. Amount in words
- u. Print / Save
- v. Bill wise accounting required
- w. Status on invoice : Not Submitted, Waiting LPO, Submitted (Drop Down List)
- x. Attach signed credit invoice

9. Sales return (Form)

- a. Sales Return No. – Auto
- b. Date
- c. Customer - Drop Down List (Following fields should fill automatically once delivery note number selected)

- d. Credit Invoice – Drop Down List, unpaid invoices only (Following fields should fill automatically once delivery note number selected)
- e. LPO Reference
- f. Sales Account
- g. Sales Order No.
- h. Tables Starts from here
- i. Serial No.
- j. Product Details
- k. Unit
- l. Quantity - Editable
- m. Rate
- n. Discount (%)
- o. Amount
- p. Amount in words
- q. Print / Save
- r. Need to adjust against the invoice value – Bill wise accounting
- s. Attach signed Sales return