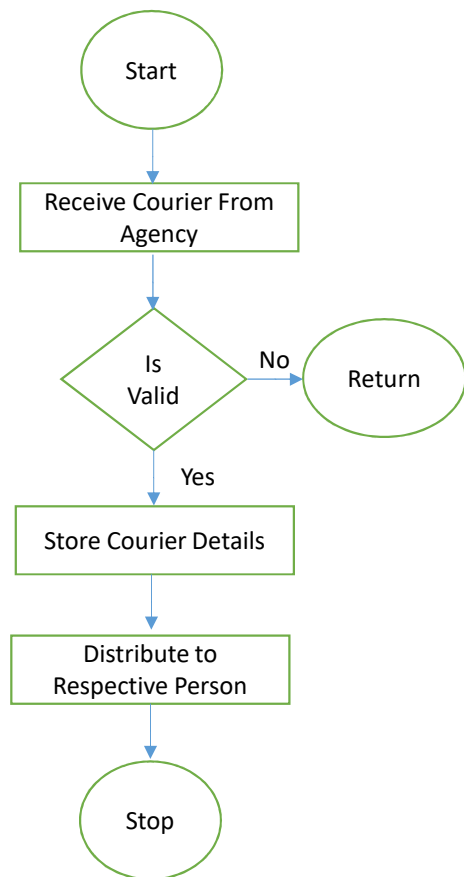# Couriers, Enquires & Purchase Management Web Application Scope

Courier Inbound

Start

↓

Receive Courier From Agency

↓

Is Valid —No→ Return

↓ Yes

Store Courier Details

↓

Distribute to Respective Person

↓

Stop

Courier Outbound

Start

↓

Collect Courier From Office Personnel

↓

Is Valid —No→ Stop

↓ Yes

Store Courier Details

↓

Record info & Transfer to Agency

↓

Stop

Enquiries

Start

↓

Receive Enquiry From Potential Customer

↓

Is Valid —No→ Stop

↓ Yes

Capture Enquiry Details Including attachments if any

→ Follow-Up Reqd. —No→ Stop

↓ Yes

Create Follow-Up & Set Reminder

→ Is New Follow-Up Reqd. —No→ Stop

↓ Yes (back to Follow-Up Reqd.)
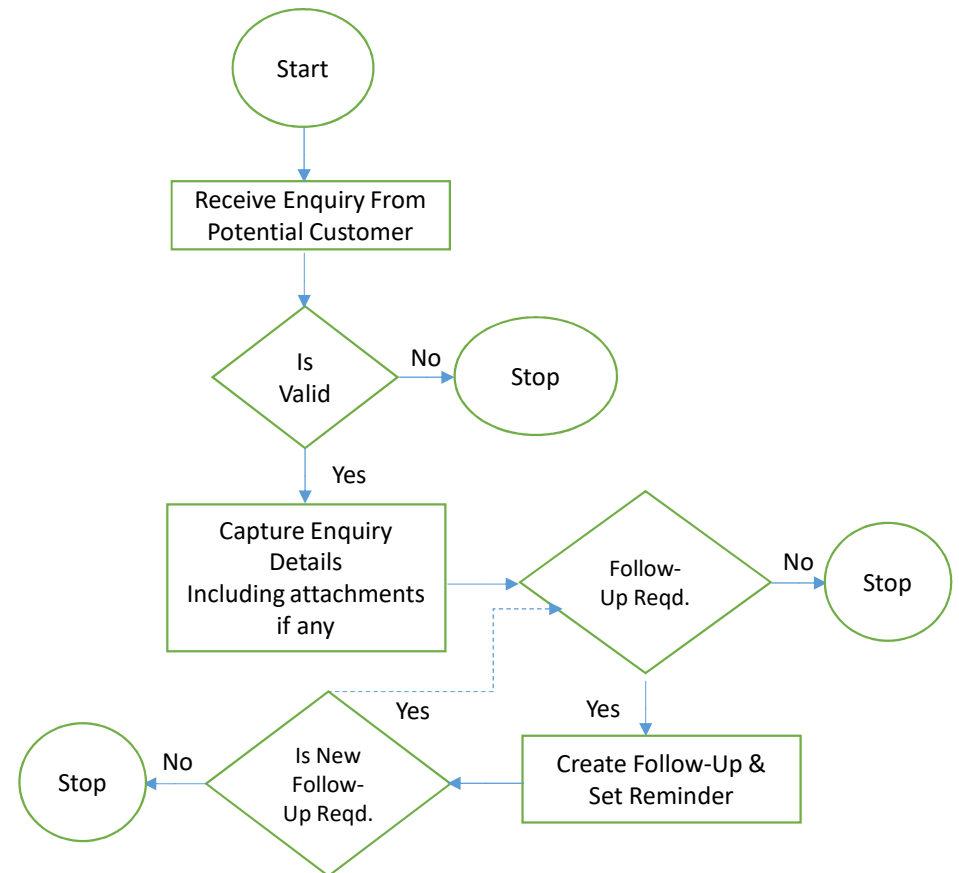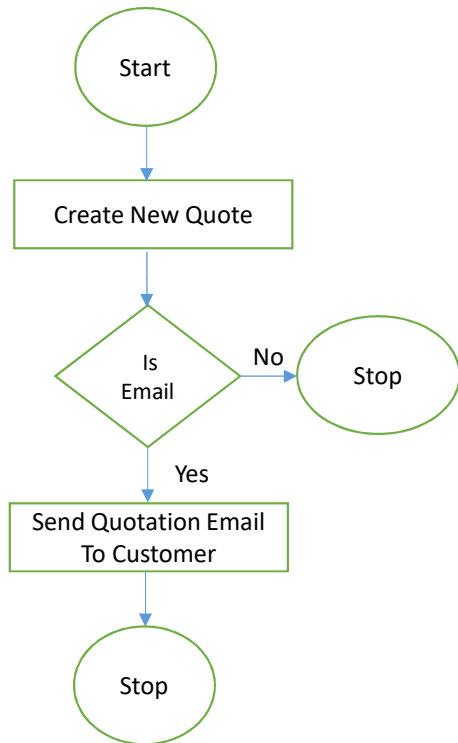
Couriers, Enquires & Purchase Management Web Application Scope

Quotations
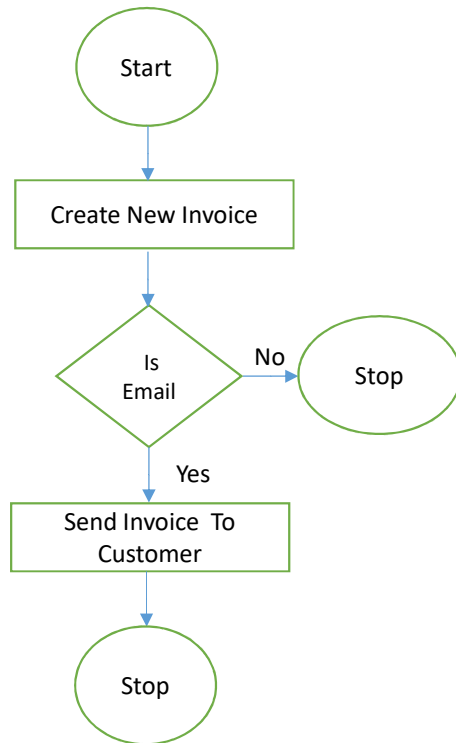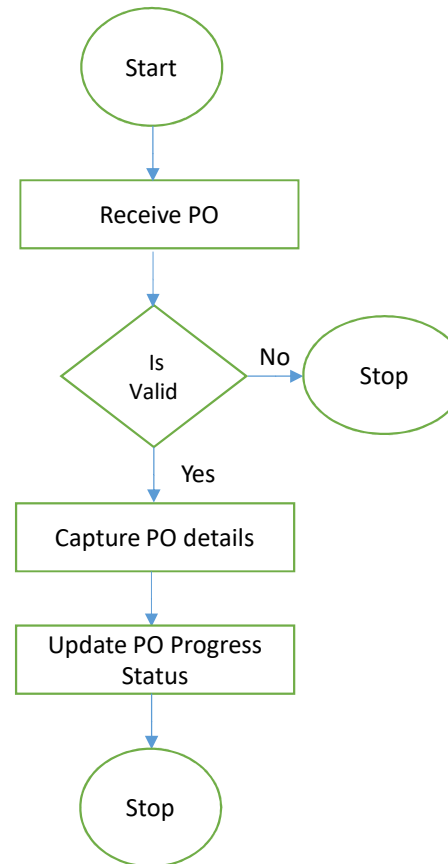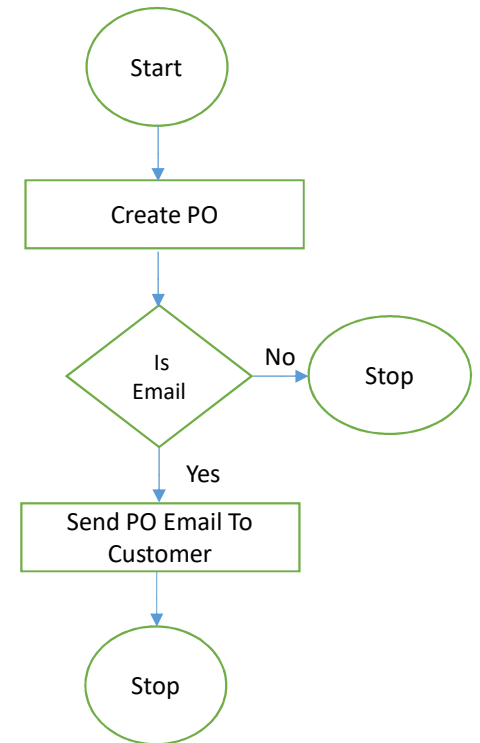
Start

↓

Create New Quote

↓

Is Email → No → Stop

↓ Yes

Send Quotation Email To Customer

↓

Stop

Pro forma Invoices

Start

↓

Create New Invoice

↓

Is Email → No → Stop

↓ Yes

Send Invoice To Customer

↓

Stop

Customer POs

Start

↓

Receive PO

↓

Is Valid → No → Stop

↓ Yes

Capture PO details

↓

Update PO Progress Status

↓

Stop

Supplier POs

Start

↓

Create PO

↓

Is Email → No → Stop

↓ Yes

Send PO Email To Customer

↓

Stop

Santhi Plastics

Enquiries, Quotation, Orders & Courier Management

John Smith

- Dashboard ⮕
- Enquiries
- Quotations
- Pro forma Invoices
- Customer Orders
- Supplier Orders
- Couriers
- Reports
- Settings

Enquiries	30 Days
CHART or SUMMARY	

Quotes	30 Days
CHART or SUMMARY	

Recent Transactions
(Latest 10 Transactions)

Customer PO

Enquiry

Quotation

Customer PO

Supplier PO

Customer POs	30 Days
CHART or SUMMARY	

Supplier POs	30 Days
CHART or SUMMARY	

Couriers	30 Days
CHART or SUMMARY	

Dashboard

Enquiries

Quotations

Pro forma Invoices

Customer Orders

Supplier Orders

Couriers

Reports

Settings

Enquiries, Quotation, Orders & Courier Management

John Smith

Enquiries

New

| OPEN : <COUNT> | CLOSED : <COUNT> | CONVERTED : <COUNT> | LOST : <COUNT> |

Search: Search any grid content   From Client: Potential Client List   Filters: **Open Invoice X**

Enquiry Date	Lead Name	Company	Contact Details	Enquiry Source	Industry	Progress Status	Lead Owner	Open/Closed
								»
								»

John Smith

Enquiry – 10001

New   Save   Back

Enquiry Date

Lead Owner

Title   **Contact Name**

Client Company

▶ Contact Details Details

Address

Website

Email

Mobile

Landline

Fax

▶ Status & Other Details

Industry

Progress Status

Enquiry Source

Enquiry Status

Deal Converted

Enquiry Status

Closed

Is Converted

Yes

Follow Ups (3)

Enquiry – 10001

New · Save · Back

▶ Follow-Ups

Date	Time	Subject	Priority	Contact	Reminder Type			

▶ Other Details

General Notes

Attachments 📎

Drag and drop files hear OR click here to browse files

(Total allowed size is 10 MB)

Enquiries, Quotation, Orders & Courier Management

John Smith

Quotations

New

| DRAFT: <COUNT> | DELIVERED: <COUNT> | IN PROGRES: <COUNT> | CLOSED: <COUNT> |

Search: _____   Customer: _____ ▼   Filters: **Open Invoice X**

Quote Date	Quote No	Subject	To Company	Contact Details	From Company	Stage		
								»
								»

John Smith

Quotation – 10001

New Save Back

Quotation No

Quotation Date

Valid Till Date

Customer

Mailing Address

Customer Contact

Sales Person

Quote From Company

Quote Stage

Quote Subject

Quote Header

Quote Stage

Closed

Email Sent (Y/N)

Yes

▶ Item Details

SlNo	Product Code	Description	Unit	Qty	Rate	Amount		

John Smith

Quotation – 10001

New   Save   Back

▶ **Commercial Details**

Gross Amount

Cash Discount

Net Taxable Amount

Auto = Gross - Discount

Tax Type

VAT, GST etc. ▼

Tax Percentage Applied

Tax Amount

Calculated based on type percentage

Total Amount

Calculated

▶ **Other Details**

Quote Footer

((Terms & Conditions etc.)

General Notes

Attachments 📎

(Total allowed size is 10 MB)

Drag and drop files hear OR click here to browse files

John Smith

Customer Order - XXXXX

New Save Back

Customer

Order To Company

Purchase Order Number

Purchase Order Date

Customer Address

Consignee Address

Order Status

Processed

PO Copy

▶ **Commercial Details**

Gross Amount

Cash Discount

Net Taxable Amount

Auto = Gross - Discount

Tax Type

VAT, GST etc.

Tax Percentage Applied

Tax Amount

Calculated based on type percentage

Total Amount

Calculated

John Smith

Customer Order - XXXX

New   Save   Back

▶ Other Details

General Notes

Attachments 📎

Drag and drop files hear OR click here to browse files

(Total allowed size is 10 MB)

Enquiries, Quotation, Orders & Courier Management

John Smith

Supplier Order - S10001

New   Save   Back

Supplier

Select Supplier ▼

Order From Company

▼

Purchase Order Number

Purchase Order Date

22-May-2017 📅

Supplier Address

Consignee Address

Order Status

Delivered

▶ Order Items

Sl.No	Item Code	Description	Unit	Qty	Rate	Total Amount	
1	Item1 ▼	High density PE MARLEX HHM TR-144	KG.	1000	100	100000	
2	ItemNo2	Test Item description 1	KG	500	50	25000	

Total :   **125000**

John Smith

Supplier Order - S10001

New   **Save**   **Back**

▶ Other Details

Message to Supplier

General Notes

Attachments 📎

Drag and drop files hear OR click here to browse files

(Total allowed size is 10 MB)

Reports

Open Invoices

Lists unpaid invoices
and subtotalled by customer.

Run

Customer Balance Summary

Shows each customer's total open balances.

Run

A/R Ageing Summary

Shows unpaid invoices for the current period and for
the last 30, 60 and 90+ days so you can see how long
they have been open (outstanding).

Run

Customer Balance Detail

Lists unpaid invoices for each customer, including
invoice date and number, due date, total, and amount
owed to you (open balance).

Run

A/R Ageing Detail

Lists all unpaid invoices, grouped by number of days
past due. Includes due dates, customer names,
amounts. and totals for each billing period.

Run

Invoice List

Shows a chronological list of all your invoices for a
selected date range.

Run