



CRM

LEAD MANAGEMENT

- Leads
Create, Search and Update Leads
- Leads
Lead source, Lead type, Lead owner
- Sales Enquiry
Create Search Update Sales Enquiry
- Task
Create Search Update Task
- Calls
Create Search Update Calls
- Events
Create Search Update Events
- Contacts
Multiple Contacts againsts Lead
- Leads
Custom Status Flow
- Email Campaign
Upto 10000 emails / month
- Location Tracker
Sales Person Tracking
- Leads
Reporting

CRM

PROCUREMENT

- Procurement Type
Materials / Services / Assets
- Product Master
Product Master Creation and Maintenance
- Vendor Master
Vendor Master Creation and Maintenance
- Purchase Indent / Purchase Requisition
Purchase request can be raised by user for materials needed
- Purchase Quotation
Entering Vendor Quotations in the System
- Quote Comparison
Comparison of Vendor Quotations
- Purchase Order
Order can be raised with product details to vendor
- Goods Receipt for Invoice and Order
Supports both Local Purchase and Order based Purchase
- Goods Receipt Note
Record Goods receipt for Purchase invoice and Order
- Multiple Goods Receipts
For a Single Order Multiple Receipts can be generated and can control over excess receipts
- Free Qty while Goods Receipts
Can record Free Qty received
- Purchase Invoice
Both order based invoice and local invoice can be raised
- Vendor Sales Invoice
can Map All details like Vendor Bill no Date
- Product details while Invoicing
Product Batch no, Lot No and Expiry will be available while invoicing
- Vendor and Product Based GST
GST Type and Percentage will be fetched from Vendor and Product Master

- Manual Edit option of GST Percentage and Rate

User can manually edit Price and GST rate While Invoicing

- Type Based Purchase Ledger

User can manually select on which Ledger should Invoice accounted

- Type Based Terms and Conditions

Terms and Condition will be Mapped according to the type Selected

- Payment Term and Bank Details Mapping

While Invoicing the Payment term and Bank details can be mapped

- Import Invoice

Record import Purchase from outside country Vendor

- Robotic Process Automation while invoicing

RPA Helps in creating invoice Documents with less manual intervention

- Document Attachment in Invoicing Screen

In All Invoicing Screen user can attached multiple documents

- Custom Invoice Numbering

User can generate dynamic numbering Sequence

- Invoice Print and Export

Invoice Print and PDF Export can be done after Invoicing

- Multiple invoice Format

User will have multiple Pre defined Report Formats

- 3rd Party Commission

On Purchase paid to be paid can also be calculated

- SEZ / Composition Levy enabled

Invoicing and Accounting based on SEZ or Composition Levy

- Inclusive / Exclusive Tax

Product Rate can be Give both Inclusive and Exclusive Tax

- TDS on purchase and Expenses

TDS will be calculated and tax will be deducted from Payables

- Custom Reports Formats

User can define their own Invoice Format

- Custom Status Flow

Invoice to have a custom status work Flow

- Purchase Return

Record return of goods to vendor

- Expenses (Vouchers)

Record Taxable Expenses

- Credit Note (Vouchers)

Raise Credit note with amount and Tax for a invoice for Customer and Vendor

- Debit Note (Vouchers)

Raise Debit note with amount and Tax for a invoice for Customer and Vendor

- Custom Fields

User can add Dynamic fields to capture data and get MIS reporting (upto 3 levels)

- Production Order Lite

Production order lite will help in simple assembly process and keeps track on material movement

- Work Order Lite

Work Order Lite helps in products conversion or simple assembly for specific client and it keeps track on Customer inventory

CRM

SALES

- Product Master

Product Master Creation and Maintenance

- Customer Master

Vendor Master Creation and Maintenance

- Customer Active / In active and Custom Status Flow

User can set Custom status flow for customer management

- Customer Credit Limit

User can Set Credit Amount, that a customer can avail

- Sales Quotation

Issue Quotation with Tax payable



• Sales Order

Order can be raised with product details For Customer

• Sales Invoice

Invoice can be generated with GST Compliance

• Custom Invoice Numbering

Invoice numbering based on Category of sale

• Product details while Invoicing

Product Batch no, Lot No and Expiry will be available while invoicing

• Price List Mapping

Price Config according to Tier, type or on seasonal price change

• Customer and Product Based GST

GST Type and Percentage will be fetched from Customer and Product Master

• Manual Edit option of GST Percentage and Rate

User can manually edit Price and GST rate While Invoicing

• Type Based Sales Ledger

User can manually select on which Ledger should Invoice accounted

• Type Based Terms and Conditions

Terms and Condition will be Mapped according to the type Selected

• Payment Term and Bank Details Mapping

While Invoicing the Payment term and Bank details can be mapped

• Sales Price – MRP, PTS and Retail Price

Price can be configured according to the Customer

• Free Quantity – Trade Discount

Free Quantity can be issued to customer

• Sales Person Mapping

While Invoicing the Sales person involved in sales can be mapped

• Export Invoice

Export Invoice will be created for Outside country Customer

• Multi – currency

In Export invoice can record invoice in both Local Currency and foreign Currency

• Robotic Process Automation while invoicing

RPA Helps in creating invoice Documents with less manual intervention

• Invoice Print and Export

Invoice Print and PDF Export can be done after Invoicing

• Multiple invoice Format

User will have multiple Pre defined Report Formats

• 3rd Party / Sales Person Commission

System will generate Commission payable according to the rule

• Inclusive / Exclusive Tax

Product Rate can be Give both Inclusive and Exclusive Tax

• SEZ / Composition Levy enabled

Invoicing and Accounting based on SEZ or Composition Levy

• Discount on Total, Percentage and Price

Discount can be configured by Product Based, Percentage and Total Amount

• Territory Wise Sales

Territory can be created and mapped to invoice and get reports

• Custom Status Flow

Invoice to have a custom status work Flow

• Document Attachment in Invoicing Screen

In All Invoicing Screen user can attached multiple documents

• Delivery Challan

Delivery Challan can be generated for goods moved without Invoice

• Point Of Sale

POS Enabled for Retails Store Invoicing

• Custom Fields

User can add Dynamic fields to capture data and get MIS reporting

• Sales Return

In Case of Sales return, user can provide return details, system will create inventory changes and accounting entry

CRM

INVENTORY

• Multiple Store / Warehouse Creation

User can Configure multiple Store / Warehouse with its GSTIN and Address

• Product and Service

user can create Product as well as Service

• HSN / SAC Mapping

For Product and Service user can mapp HSN and SAC Code

• Search HSN No

User use Product description to Find its HSN number

• SKU Mapping

User can map Barcode ID for product

• Custom UOM

User can create Custom UOM

• Inventory Type

maintain inventory with FIFO, LIFO or Weighted Average

• Price mapping

User can map PTS, MRP and retail price

• Tax type and Percentage

Create Product with tax type - Exempted, nil and regular

• Product Category, Class and Brand

Classify Product with Category, class and Brand

• Product Specification

User can add multiple specification according to the Category and Class

• Inventory Control mapping

Map Product with Minimum, maximum and reorder Level

• Control Sales and Purchase

For each product user can block Purchase and sales

• Discontinue Product

Move product to In active status, so it will be available in reports

• Custom Fields

User can add Dynamic fields to capture data and get MIS reporting (upto 3 levels)

• Bulk Product Update

Bulk update the selling price for all products

• Products Import using CSV File

Upload Product list using CSV File

• Products Excel Export

Export Product List in Excel

• Opening Stock

Provide opening balance on Year Start

• Upload Opening Stock

Upload Stock using CSV File

• Product Onhand Quantity

Screen Provides you the list of products and its on hand Quantity

• View Inventory

User can view Inventory of particular Product

• View Inventory History

Filter Period and view Inventory Movements

• Adjust Inventory

Incase of Stock Mismatch, user can update in the screen

• Inventory Tag Update

User can update inventory details like Purchase Price, location

• View Inventory By Category

User can view Category wise Stock and its value

• Inventory Shelf Life

User can view Inventory Shelf days stored

• Inventory Expiry Summary

Screen Displays inventory according to Expiry date

• View Segment Wise Product History

Screen displays the inventory of the product accroding to the dimension provided



• Inventory Control Report

Reports provides Min , Max and reorder Level

• Stock Transfer

Stock transfer helps in Inter Store stock movements and helps in full track of inventory

• Store Issue

Screen helps to issue stock

• Store Receipt

Screen helps to Receipt stock

• Material Demand Summary

The Wizard in the screen collects the inventory demanded through Sales Order, Purchase indent and helps to raise Purchase Order

CRM

ACCOUNTS

• Chart of Accounts

Screen Displays Ledger account and Groups in tree View

• Multi Currency Ledger

user can create ledger with Non Local Currency

• Opening Balance

Screen helps to feed in balance for Asset and liability ledger

• Opening Balance Uploader

Opening balance can also be uploaded using CSV File

• Journal

Screen helps to create all types of accounting entries

• Multi Currency Journal

Screen helps to create all types of accounting entries with more the one currency

• Journal Uploader

User Can upload Accounting entries using CSV Format File

• Record Income

Screen helps to record indirect Income

• Sales Invoice Register

Screen helps to find all unpaid invoices

• Receive Payment

Screen helps to receive payment againts the Sales Invoice with Bank, cash and Cheque

• Record Expenses

Screen helps to record indirect Expenses

• Purchase Invoice Register

Screen helps to find all unpaid invoices

• Make Payment

Screen helps to Make payment againts the purchase Invoice with Bank, cash and Cheque

• Credit Note

Credit Note screen helps to record cash Discount for sales / Purchase

• Debit Note

Debit Note screen helps to record cash Discount for sales / Purchase

• Cash Receipts and Payment

Cash Transaction can be created in this screens

• Bank Receipts and Payment

Bank Transaction can be created in this screens

• Contra

Cash Deposit, withdrawal and Inter Bank transfer Transaction can be created in this screens

• Day Book

Day Book Displays the debit and credit for selected period

• Outstanding Balance

Screen Displays ledger Balance of the selected Groups

• View Ledger

View ledger displays single and Multiple ledger transactions

• Trial Balance

Trial Balance Displays ledger Accounts balance for selected period

• Profit and Loss

Displays Profit / Loss for the Selected Period

• Balance Sheet

Displays Asset and Liabilities for the Selected Period

• Cash Flow Projections

Screen Displays Promised Cash Inflow and outflow and Sales And Purchase Due's

• Cash Flow Statement

Cash Flow Statement display Cash flows for the type

• Reconciliation

User can Reconcile all type of ledgers using CSV Format files

• Post Date Cheque

All Cheques Issued and Received will be displayed and user can provide the cheque realization date

• Freeze Accounting Period

User can Generate Accounting Period (Monthly, quarterly or Custom) and Freeze all Transactions for the period

• Year End Closing

On end of year the year end Closing Wizard helps to calculate P /L and transfers Closing balance to Next Fiscal Year

RIGHT TOOLS FOR EFFICIENT SALES & REVENUE

TRACKING

3
USERS

GROWTH CRM

Rs
1650
PER MONTH