



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

- Industry wise custom field generation

Customer can create custom data capturing field (date, textbox, dropdown and multiselect) upto 10 levels



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 Attachement in Invoicing Screen

In All Invoiceing 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

• Industry wise custom field generation

Customer can create custom data capturing field (date, textbox, dropdown and multiselect) upto 10 levels

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, nill 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

• Inventory Locator

Inventory Locator helps in find inventory by location, Picklist Generation and inter BIN Transfer

• 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 according 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

- **Industry wise custom field generation**

Customer can create custom data capturing field (date, textbox, dropdown and multiselect) upto 10 levels

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 againsts 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 againsts 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

- **Intra Company Transfer**

User can transfer any ledger balance with a company with the Function

- **Fund Transfer**

This Screen helps to amount from Local Currency to Foreign Currency

- **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

- **Multiple Format on Reports**

User can choose predefined Reports

- **Custom Status Work Flow**

User can Set status Work flow

- **Custom Fields**

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

- **Export Data**

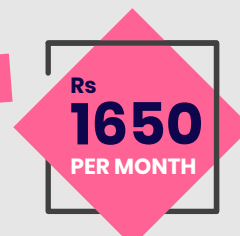
User can export all Ledger data and Accounting transaction to a excel file

- **Industry wise custom field generation**

Customer can create custom data capturing field (date, textbox, dropdown and multiselect) upto 10 levels

EFFORTLESS ENTERPRISE MANAGEMENT

AT YOUR FINGER TIPS



SCALE CRM