ERP

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 againtgs Lead
- **Leads**
  Custom Status Flow
- **Email Campaign**
  Upto 50000 emails / month
- **Location Tracker**
  Sales Person Tracking
- **Leads**
  Reporting

ERP

PROCUREMENT

- **Procurement Type**
  Materials / Services / Assets
- **Product Master**
  Product Master Creation and Maintenace
- **Vendor Master**
  Vendor Master Creation and Maintenance
- **Purchase Indent / Purcahse Requesition**
  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 Purahase 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 Receitps**
  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 Attachement in Invoicing Screen**
  In All Invoiceing 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 hepls 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 multiselct) upto 10 levels

ERP
SALES

- **Product Master**
  - *Product Master Creation and Maintenace*
- **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 Quoation**
  - *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 multiselct) upto 10 levels*

ERP
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 Proides 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 inventrory 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 multiselct) upto 10 levels

ERP
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 uplaod 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
- **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 Forgien 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
- **Frezee Accounting Period**
  User can Generate Accounting Period (Monthly, quarterly or Custom) and Frezee all Transactions for the period
- **Year End Closing**
  On end of year the year end Closing Wizard helps to calculate P /L and transfers Closeing 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 multiselct) upto 10 levels

SCALE

ERP

- **Work Order**
  - Word order helps to manage the orders from Customer
- **Production order**
  - Production Order helps to Manage the Production from Internal sales demand
- **Production Operation**
  - User can Define jobs that is handeled
- **Bill of Material**
  - User can define the BOM of the products Produced
- **BOM tree view**
  - User can view BOM Tree
- **Work Order Product Details**
  - User can provide Product details and quantity and excess percentage required
- **TNA Plan**
  - User can Time and Action Details for the work order
- **Documents and Image Attachements**
  - User can Attach the documents relared to the work order
- **TNA Template**
  - User can use Time and Action plan to manage the production process for a work order
- **BOM According to Work order**
  - User can map Bom for the FG and user can also add additional RM not in BOM for the Work Order
- **Documents and Image Attachements**
  - User can Attach the documents relared to the work order
- **Prodcution Process mapping**
  - user can Map Production process required to complete the work order
- **Inspection in Production Process**
  - User can define in each production process whether the output needs Inspection
- **Assign Supervisior**
  - User can assign supervisior for the Work order
- **Work Order Approval and Freeze**
  - Post creation of Work order it should move on Approval flow and to be freezed
- **Material Demand**
  - Post Work Order Free user can generate material Demand
- **Supplier Price List**
  - Procurement team can update the Supplier Price list for Individule Work Order
- **Procurement Flow**
  - user can initiate the Procurement Flow for Materials needed
- **Production Process**
  - According to Job Type (In house or Job Order) user can Initiate Production Process
- **Production Process Approval**
  - User can start the Production Process Post the Approval Provided
- **Material Issue**
  - Post approval of Production process user can issue Material for Job
- **Material Receipt**
  - Once Production process is Completed the Materials can be received
- **Daily process Activity**
  - User can view Production process in each departments and the Materials Produced
- **FG Receipt**
  - User can Receitp FG to Store
- **Progress Summary**
  - User can view FG Ordered Produced and dispatced
- **Sales Flow**
  - User can Initiate the Sales Invoice or Stock Dispatch
- **Process Activity Details**
  - User can View the on Going production Process for a work order or a whole

- **Material Planning**
  - System will Provide user details about Material to be Procured, issued to outside Job and manufactured
- **Material Inspection**
  - Post Receipt of Goods if production Process has inception user can define Rejected / Reword Quantity
- **Work In Progress**
  - User can View the inventory in Production in each Process and Inventory issued to Job Order
- **Cost Analysis**
  - User can View Cost, Income Projection and compare it with Actual Data

ERP

CUSTOM REPORTS

- **Excel Query Builder**
  - Customized excel reports ae generate by support team and it will be chargeable / report
- **Custom Invoice Formats**
  - Invoice formats are customized as per the customer format and it will be chargeable
- **On demand reports**
  - Cutomer specific reports are generate by our support team and it will be chargeable /report
- **Business Intelligence Reports**
  - As per customer requirement our support team will be generate the customized charts using our BI engine (upto 20)

EFFORTLESS ENTERPRISE MANAGEMENT AT YOUR FINGER TIPS

5 USERS

SCALE ERP

Rs 4800 PER MONTH