



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
- Email Campaign
Upto 2000 emails / month
- 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 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 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 Invoicing Screen user can attached multiple documents
- 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
- 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
- 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

CRM

SALES

- Product Master
Product Master Creation and Maintenance
- Customer Master
Vendor Master Creation and Maintenance
- 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
- Product details while Invoicing
Product Batch no, Lot No and Expiry will be available while invoicing
- 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 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
- 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

- Document Attachement in Invoicing Screen

In All Invoicing Screen user can attached multiple documents

- Delivery Challan

Delivery Challan can be generated for goods moved without Invoice

- Sales Return

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

CRM

INVENTORY

- 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

- 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

- 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 Proides you the llt 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

- View Inventory By Category

User can view Category wise Stock and its value

- Inventory Control Report

Reports provides Min , Max and reorder Level

- Store Issue

Screen helps to issue stock

- Store Receipt

Screen helps to Receipt stock

CRM

ACCOUNTS

- Chart of Accounts

Screen Displays Ledger account and Groups in tree View

- 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

- 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

- 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

- 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