



Sales Order Tracking

Materials

- Procurement for each item in the sales order is closely tied directly or through BOM/Indents for close tracking of the material flow for fulfilling the Sales Order
- Complete material tracking against each item including
 - Purchases
 - Issues
 - Issues to Vendors
 - Returns From Vendors
- Finally to get the material cost for the item

Process

- Production process is tied to the get real time update on the progress
- Delays and estimated delivery dates are reported on real time basis
- Costing of all the labour and resources consumed for delivering the order

Financials

- Sales Invoices and all the payments received are tagged to each Sales Order to track Receivables
- All debits and credit for a sales order are rolled up at the Customer/Client level to get overall Accounts Receivables
- Ability to get all the cost and revenue for a Sales Order and profitability at Sales Order level

Sales Order

- Custom Order Details - based on your business needs capture various customer details
- Barcode Support - each order can have a barcode that can be tracked with the invoices
- Receive & Track multiple payments on an order
- Scan and attach documents
- Bulk Orders & Period or subscription Orders
- Collaborative comments, Branded Order as PDF
- Text and/or Email alerts

Sales Invoice

- Choice of Price Master
- Multi level discounts trackable upto Balance Sheet
- Taxes, Duties and Cess computed automatically from Product Master
- Custom Charges
- Multiple receipts
- Multi currency support on the payments
- Terms & Conditions

Rate Contract

- Customer wise contracts
- Product wise contracts
- Period based contracts
- Manage sales invoices from contracts
- Aging invoices — integration with [finance module](#)

Sales Quote

- Manage Request for Quote
- Track Sales Lead product/quote
- Manage Price per customer per period
- Auto generate sales invoice

Hire Purchase

- Payment schedule calendars
- Build and manage Guarantor Base
- Track with *Interest Suspense* or *Cash Price* method
- Manage penal interest and penal fees by posting it to the finance books

POS

- Cash & Credit Sales
- Gift vouchers and Coupons
- Optional inventory check - need [inventory module](#)
- Optional barcode tracking on batch or lot numbers, again need inventory module

Sales Lead

- Leads for the business
- Track the leads data on various sales campaigns and promotions
- Track the status of leads, till their conversion
- Attach tasks and documents to sales leads for further action by operators
- Send SMSs and e-mails to selected leads.
- Product Catalog & Price Master - import product catalog, categories, assign taxes, duties and cess. Period wise price master and discount master can be loaded at any time
- UOM Calculator - on the fly unit of measure calculations - convert from one unit to another unit
- Credit and Debit Notes - generate item wise credit or debit note
- **2 Step Approval for all transactions** - Sales executives or counter professional can use the system and create all the voucher/invoice while a senior accountant or manager can review, make changes if needed and approve them
- **Role based access control and system audit trails** - The access to various transactions is very fine grained and can be controlled at each small transaction level for each user
- **Personalized Stationary** - Invoices, Bills and Orders can be customized and branded with your stationary needs. Generate PDF files, notify by email or Text
- **Customer Login** - Create logins for all your customers to view their invoices and payments