



# DDMS

# User Manual



# Index

Introduction to DDMS	4
<b>My Account</b>	5
Message Inbox	5
Change Password	6
Authorization	6
E-mail Settings	7
<b>Master</b>	8
Material Master	8
Material Sequence Master	9
Price List Master	9
Customer Group Master	10
Customer Master	10
Employee Group Master	12
Employee Master	13
Warehouse Master	15
Question Master	15
<b>Route</b>	16
Tollbooth	16
Route Master	17
<b>Daily Activity</b>	19
New Load	19
Reload	21
Unload	23
<b>Order</b>	26
Sales Order	26
Special Instruction	27
<b>Invoice</b>	28
Invoice Master	28
Payment	29
<b>Inventory</b>	31
Inventory Update/Return	31
Inventory Transfer	32
<b>Fleet</b>	33
Vehicle Master	33
Checkpoint Mapping	34
Fuel Management	34
Schedule Maintenance	35
Service Contract	35
Vehicle Enrollment	36
Breakdown Maintenance	36

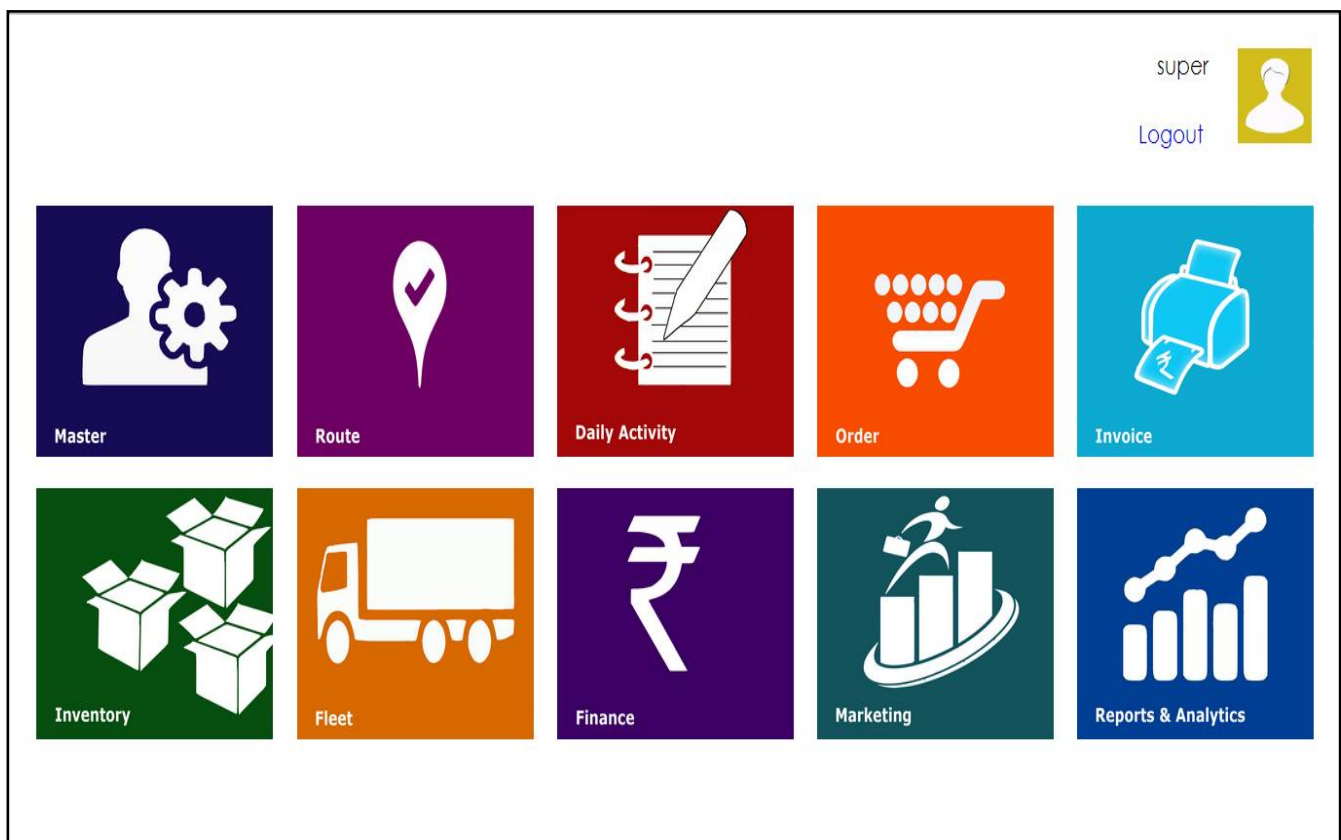


<b>Finance</b>	<b>38</b>
Chart of Account	38
Collected Cheques	39
Tax	39
Credit Note	40
Tax Mapping	40
Journal Entry	41
GL Group Creation	41
Payment Terms	42
<b>Marketing</b>	<b>43</b>
Campaign Creation	43
Campaign Survey	44
Client Feedback	44
Company Profile	45
Message Broadcast	45
<b>Reports &amp; Analytics</b>	<b>46</b>
Daily Activity Route	46
Daily Activity – New Load	47
Daily Activity - Unload	47
Inventory in Warehouse	48
Inventory in Vehicle	48
Total Sell	49
Employee Wise Currency	49
In Active Customers	50
Inventory Return	50



## Introduction to DDMS

DDMS is a complete solution for dealers, distributors and retailers. It allows you to enter master data for materials, customers, employees, etc. It covers the main module of daily activity that will have all the details that are carried out in the whole day in particular vehicles with the details of materials in them. Route gives you the details of the customers on all the routes and details of tollbooth if any. Order module is for placing order and it also has the facility to place a special order, the invoice of the order can be viewed from invoice module and payment can also be done from here. Inventory module gives all the information of your warehouse, fleet gives all the details of vehicles, finance gives you details of the account. Marketing deals with campaigning of the products and taking feedbacks from the customers. Reports & Analytics gives you reports that are useful at transaction level.



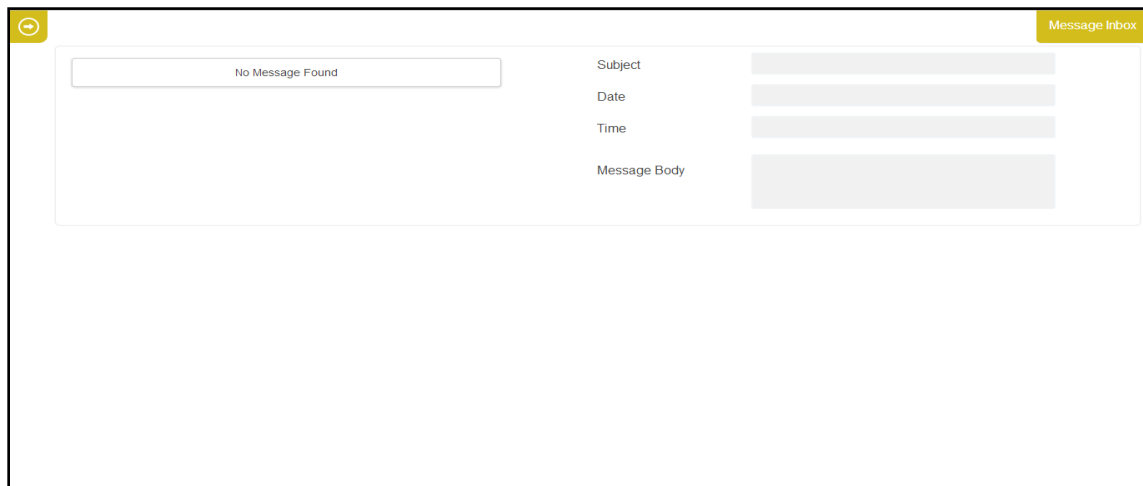
## My Account

My account has details related to the individual account. It shows you messages that are broadcasted. You can change the password from here and change the settings of email also. Authorization will provide you with the facility of giving authorities to different users for different forms.



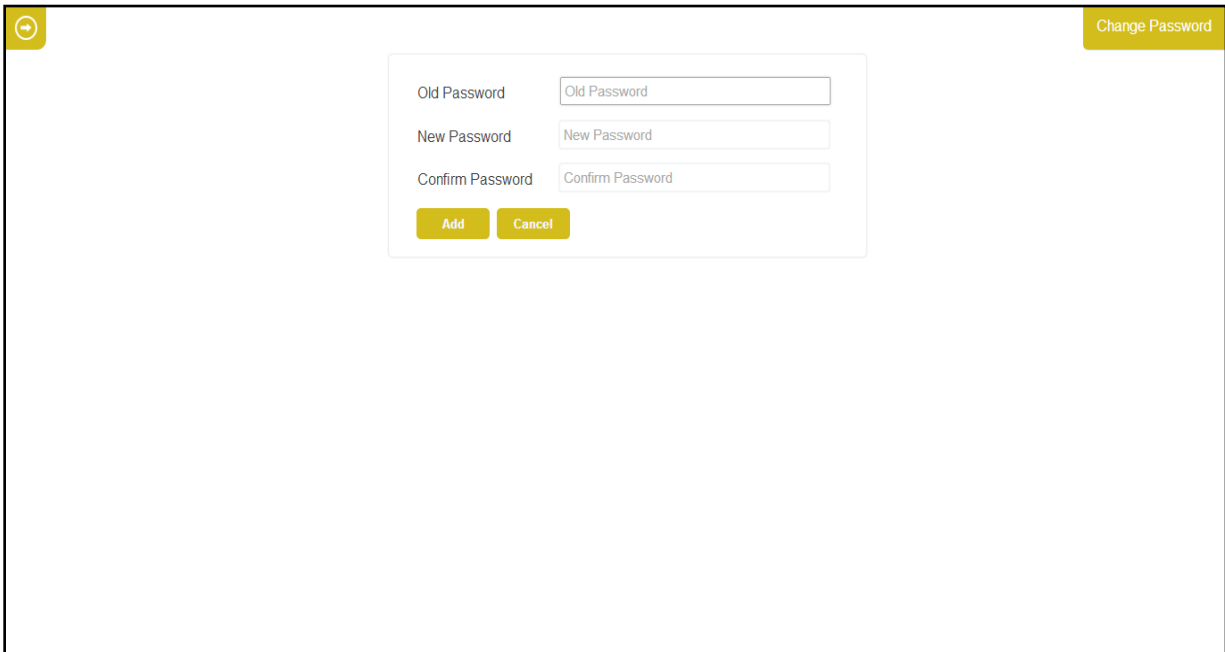
## Message Inbox

It will help you read the message that has been broadcasted by the distributor.



## Change Password

You can change your existing password from here.



Change Password

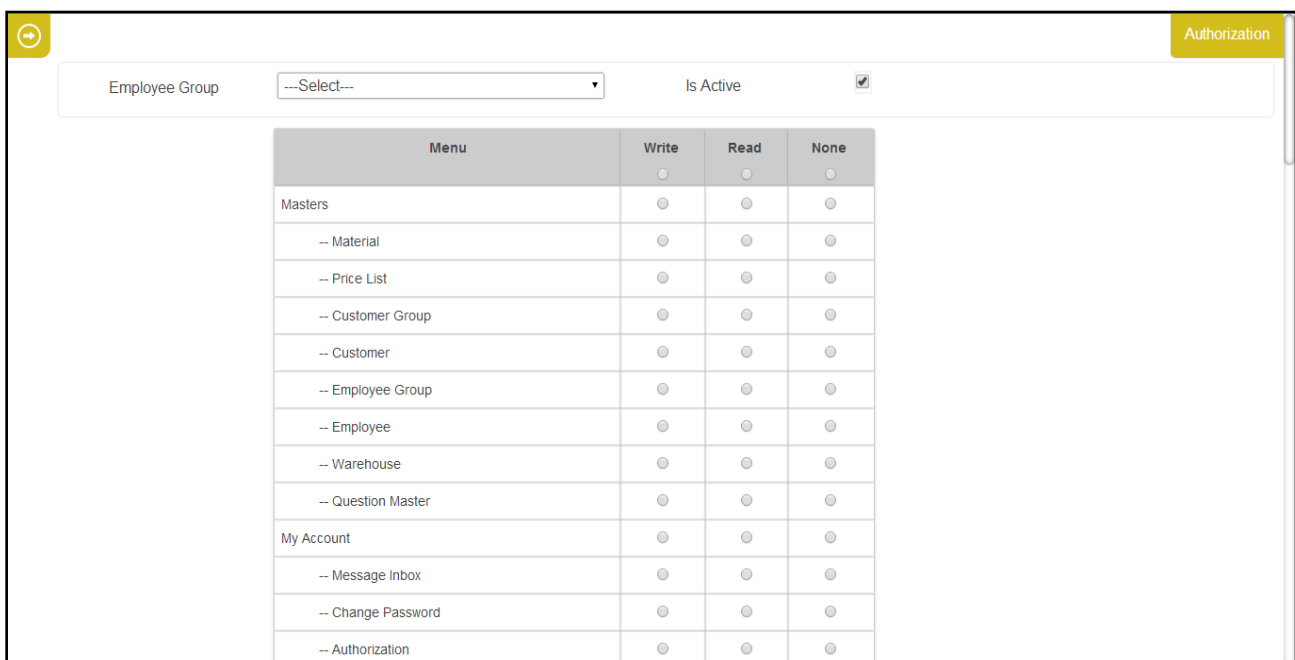
Old Password

New Password

Confirm Password

## Authorization

Authorization will allow you to give authorities to different employee groups, who will have access to which forms and in which mode.



Authorization

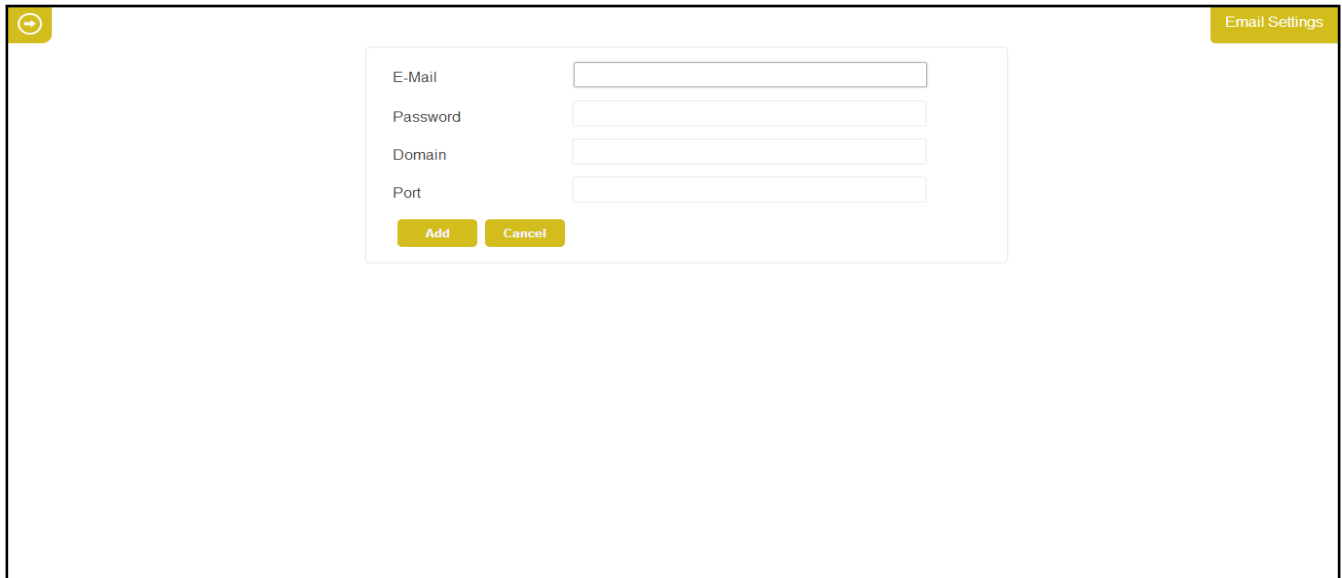
Employee Group  Is Active

Menu	Write	Read	None
Masters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-- Material	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-- Price List	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-- Customer Group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-- Customer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-- Employee Group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-- Employee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-- Warehouse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-- Question Master	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My Account	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-- Message Inbox	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-- Change Password	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-- Authorization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



## Email Settings

Email Settings will provide you to configure email id of any new employee.



The screenshot shows a web interface for configuring email settings. It features a central form with four input fields: E-Mail, Password, Domain, and Port. Below these fields are two buttons: 'Add' and 'Cancel'. The interface is enclosed in a yellow border with a back arrow in the top-left corner and the text 'Email Settings' in the top-right corner.

E-Mail	<input type="text"/>
Password	<input type="password"/>
Domain	<input type="text"/>
Port	<input type="text"/>



## Master

Master page will allow you to make entry in all the master pages. Material and price list master can be edited by the distributor only. Material sequence will allow you to set the priority of the materials in which you deal. Question, customer group, customer, employee group and employee master will allow you to add new information as well as update existing.

## Material Master

Material Master will allow you to add new material's information from this form. You will have to fill all the details of size and prize of the new material as well as from when it will be available and till when it will be available and you can update the details of existing materials also. Rights to edit this form are with distributor only.

Detail	Packet	Patti	Bunch	Box	Katta	L (cms)	B (cms)	H (cms)	Weight(gms)	Price (Rs)
Packet	0	0	0	0	0	0	0	0	0	0
Patti	0	0	0	0	0	0	0	0	0	0
Bunch	0	0	0	0	0	0	0	0	0	0
Box	0	0	0	0	0	0	0	0	0	0
Katta	0	0	0	0	0	0	0	0	0	0





## Material Sequence Master

Material Sequence Master will allow you to set priority of the materials you use most frequently or the materials in which you deal. When you set the priority of the materials, then at transaction time you will get the items in the same sequence you have set the priority. You can update it if you have any changes in it.

No	Priority	Material Name	IsActive
1		20 GM SALTED WAFERS	<input checked="" type="checkbox"/>
2		20 GM MASALA WAFERS	<input checked="" type="checkbox"/>
3		20 GM TOMATO WAFERS	<input checked="" type="checkbox"/>
4		20 GM CHAT CHASKA WAFERS	<input checked="" type="checkbox"/>
5		20 GM MASALA DHOOM WAFERS	<input checked="" type="checkbox"/>
6		20 GM CREAM & ONION WAFERS	<input checked="" type="checkbox"/>
7		50 GM SALTED WAFERS	<input checked="" type="checkbox"/>
8		50 GM MASALA WAFERS	<input checked="" type="checkbox"/>
9		45 GM TOMATO WAFERS	<input checked="" type="checkbox"/>
10		45 GM CHAT CHASKA WAFERS	<input checked="" type="checkbox"/>
11		45 GM MASALA DHOOM WAFERS	<input checked="" type="checkbox"/>
12		45 GM CREAM & ONION WAFERS	<input checked="" type="checkbox"/>
13		170 GM SALTED WAFERS	<input checked="" type="checkbox"/>
14		170 GM MASALA WAFERS	<input checked="" type="checkbox"/>

## Price List Master

Price List Master will allow you to enter the prices of any new material as well as update the prices of existing products of dealer and retailer both. Rights to edit this form are with distributor only.

Material Code	Material Name	Packet	Patti	Bunch	Box	Katta	Notes
1	20 GM SALTED WAFERS	0	0	0	0	0	
2	20 GM MASALA WAFERS	0	0	0	0	0	
3	20 GM TOMATO WAFERS	0	0	0	0	0	
4	20 GM CHAT CHASKA WAFERS	0	0	0	0	0	
5	20 GM MASALA DHOOM WAFERS	0	0	0	0	0	
6	20 GM CREAM & ONION WAFERS	0	0	0	0	0	
7	50 GM SALTED WAFERS	0	0	0	0	0	
8	50 GM MASALA WAFERS	0	0	0	0	0	
9	45 GM TOMATO WAFERS	0	0	0	0	0	
10	45 GM CHAT CHASKA WAFERS	0	0	0	0	0	



## Customer Group Master

Customer group master will allow you to add new customer group or update any existing customer group.

Customer Group Master form interface showing fields for Name, Price List, Is Active, and Description. The Name field is marked as a Required Field. The Price List field is a dropdown menu showing --Select--.

## Customer Master

Customer master will allow you to enter the details of the new customer or update the information of existing customers. First tab (general) will require the common information about the customer. Customer code will be auto generated.

Customer Master form interface showing fields for Customer Code, Customer Name, Is Active, and various details like Group, Prefer Plant, Phone, Fax, Email, WebSite, and Notes. The Customer Code is auto-generated. The Customer Name field is marked as a Required Filed. The Group field is a dropdown menu showing --Select--.



Second tab (branch) will show you the customer's branches and its location, you can edit it also. If you want to add branch, you can enter the details herewith complete address and other mandatory information.

Customer Code: Auto Generated | Customer Name: Required Filed | Is Active:

General | **Branches** | Contact Person | Account Details

No Branch Found.

Branch:

Block:

Street:

Neighbourhood:

Location (Area):

Mobile:

City:

Pin Code:

State:

Add | Cancel

Third tab (contact person) will show you the contact person at that particular branch, you can edit it also. If you want to add contact person, you can enter the details herewith his name and other mandatory information.

Customer Code: Auto Generated | Customer Name: Required Filed | Is Active:

General | Branches | **Contact Person** | Account Details

No Contact Person Found.

First Name:

Last Name:

Mobile:

Phone:

Official Email:

Personal Email:

Designation:

Branch:

Department:

Add | Cancel

Fourth tab (account details) will allow you to enter the information about the account of that particular customer.

Customer

Add Mode

Customer Code Auto Generated Customer Name Required Filed Is Active

General Branches Contact Person Account Details

GL Code  Credit Limit

GL Name  Credit Days

Bank Name  PAN No.

Branch Code  VAT No.

IFSC Code  CST No.

ECC No.

Add Cancel

## Employee Group Master

Employee group master will allow you to add new employee group or update any existing employee group.

Employee Group

Add Mode

Name Required Filed Is Active

Description

Add Cancel



## Employee Master

Employee master will allow you to enter the details of the new employee or update the information of existing employees. First tab (general) will require the common information about the employee. Employee code will be auto generated.

The screenshot shows the 'Employee Master' form in 'Add Mode'. The 'Code' field is 'Auto Generated' and the 'Name' field is a required field. The 'General' tab is active, showing fields for Branch, Work Phone - Ext, Work E-Mail, Notes, Mobile - Home, Personal E-Mail, Is Active, and Gender. The 'Add' and 'Cancel' buttons are at the bottom.

Field	Value
Code	Auto Generated
Name	Required Field
Branch	---Select---
Work Phone - Ext	Work Phone: <input type="text"/> Ext: <input type="text"/>
Work E-Mail	someone@example.com
Notes	<input type="text"/>
Mobile - Home	Mobile: <input type="text"/> Home: <input type="text"/>
Personal E-Mail	<input type="text"/>
Is Active	<input checked="" type="checkbox"/>
Gender	---Select Gender---

Second tab (address) will require the information about the employee's location with complete address and other mandatory information.

The screenshot shows the 'Employee Master' form in 'Add Mode', with the 'Address' tab active. The 'Code' field is 'Auto Generated' and the 'Name' field is a required field. The 'Address' tab shows fields for Type, Block, Street, Location, City, State, Country, Pin Code, Contact Person, and Mobile - Phone. The 'Add' and 'Cancel' buttons are at the bottom.

Field	Value
Code	Auto Generated
Name	Required Field
Type	---Select---
Block	<input type="text"/>
Street	<input type="text"/>
Location	<input type="text"/>
City	---Select---
State	---Select---
Country	---Select---
Pin Code	<input type="text"/>
Contact Person	<input type="text"/>
Mobile - Phone	Mobile: <input type="text"/> Phone: <input type="text"/>



Third tab (Account) will require the information about the employee's account.

The screenshot shows the 'Employee Master' form with the 'Account' tab selected. The 'Code' field is 'Auto Generated' and the 'Name' field is marked as a 'Required Field'. The form contains the following fields:

Field	Value/Type
Code	Auto Generated
Name	Required Field
GL Code	Text Input
Description	Text Input
GL Group	Text Input
Credit Limit	Text Input
Credit Days	Text Input
Payment Mode	---Select---
Bank Name	Text Input
Branch Code	Text Input
PAN Number	Text Input
Salary	Text Input

Buttons: Add, Cancel

Fourth tab (HR) will require the information related to HR department as well as other mandatory details also.

The screenshot shows the 'Employee Master' form with the 'HR' tab selected. The 'Code' field is 'Auto Generated' and the 'Name' field is marked as a 'Required Field'. The form contains the following fields:

Field	Value/Type
Type	---Select---
Group	---Select---
User Name	Text Input
Security Question	---Select---
Education	Text Input
Licence No. - Expiry	License Number, Expiry
Joining Date	Text Input
Password	Text Input
Security Answer	Text Input

Buttons: Add, Cancel

URL: localhost:2345/Master/EmployeeMaster.aspx#

## Warehouse Master

It will allow you to add the details of any new warehouse or update the details of existing warehouse. It will also have the details of location and contact person there.

Warehouse

Add Mode

Name	<input type="text" value="Required Field"/>	Is Active	<input checked="" type="checkbox"/>	Is Default	<input checked="" type="checkbox"/>
Type	<input type="text" value="--Select--"/>	Warehouse Size	<input type="text" value="Required Field"/>	<input type="text" value="Required Field"/>	<input type="text" value="Required Field"/>
Block	<input type="text"/>	Street	<input type="text"/>		
Location (Area)	<input type="text"/>	City	<input type="text" value="--Select--"/>		
Pin Code	<input type="text"/>	State	<input type="text" value="--Select--"/>		
Contact Person	<input type="text"/>	Country	<input type="text" value="--Select--"/>		
Phone	<input type="text"/>	Mobile	<input type="text"/>		
Notes	<input style="height: 40px;" type="text"/>				

Add
Cancel

## Question Master

Question Master will provide you to add questions for campaigning, feedback and security or update existing questions.

Question Master

Add Mode

Question Name	<input type="text" value="Required Filed"/>	Is Active	<input checked="" type="checkbox"/>	
Document Type	<input type="text" value="--Select--"/>	Type	<input type="text" value="--Select--"/>	
Description	<input style="height: 40px;" type="text"/>			

Add
Cancel



## Route

Route module will give you the details of the route and customers on that route as well as tollbooth details also.



## Tollbooth

Tollbooth will help you add details of new tollbooth or update the details of existing one. It will comprise the details of toll collected for different vehicles at different locations.

The screenshot shows the 'Tollbooth' form interface. At the top left is a back arrow icon, and at the top right is the 'Tollbooth' header. Below the header is an 'Add Mode' toggle switch. The form contains the following fields:

- Name:** A text input field with a red border and the placeholder text 'Required Field'.
- City:** A dropdown menu with the placeholder text '--Select--'.
- Is Active:** A checked checkbox.
- Notes:** A large text area.
- Heavy Vehicle:** A numeric input field with the value '0'.
- Truck / Tempo:** A numeric input field with the value '0'.
- Rickshaw:** A numeric input field with the value '0'.

At the bottom of the form are two buttons: 'Add' and 'Cancel'.





## Route Master

Route Master will allow you to add details of the route and other information related to that particular route and you can edit the details as well of existing routes. First tab (general) will have the details of the average business and expense on that route as well as the schedule, that on which days this particular route is followed.

The screenshot shows the 'General' tab of the Route Master form. At the top right, there is a 'Route' label. Below it is an 'Add Mode' toggle switch. The form contains the following fields:

- Route Code: Auto Generated
- Route Name: Required Field (highlighted with a red border)
- Is Active:
- Description: [Text Area]

Below these fields are four tabs: General (selected), Expense, Customer, and TollBooth. Under the 'General' tab, there is a 'Schedule' section with radio buttons for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. Other fields include:

- Pref. Sales Person: ---Select---
- Pref. Driver: ---Select---
- Average Business: Amount
- Vehicle: ---Select---
- Average Expense: Amount
- Approx. Distance: Kms.
- Notes: [Text Area]

At the bottom of the form are 'Add' and 'Cancel' buttons.

Second tab (expense) will have the detailed information about the expenses that can be incurred on that particular route.

The screenshot shows the 'Expense' tab of the Route Master form. It shares the same top header and 'Add Mode' toggle as the 'General' tab. The form contains the following fields:

- Route Code: Auto Generated
- Route Name: Required Field (highlighted with a red border)
- Is Active:
- Description: [Text Area]

Below these fields are four tabs: General, Expense (selected), Customer, and TollBooth. Under the 'Expense' tab, there are several input fields for amounts:

- Loading: Amount
- Traveling: Amount
- Boarding: Amount
- Miscellaneous: Amount
- Phone Charge: Amount
- Total Amount: Amount

At the bottom of the form are 'Add' and 'Cancel' buttons.



Third tab (customer) will require the information about the customers that will be covered in that route on that particular day and their information.

Route Code: Auto Generated | Route Name: Required Field | Is Active:

Description:

General | Expense | **Customer** | TollBooth

Status: All

No.	Customer Code	Customer Name	Location	City	In-Active
1					<input type="checkbox"/>

Add | Cancel

Fourth tab (tollbooth) will allow you to enter the information of tollbooth in that route and the toll collected for different vehicles.

Route Code: Auto Generated | Route Name: Required Field | Is Active:

Description:

General | Expense | Customer | **TollBooth**

Status: All

No.	Tollbooth Name	City Name	Heavy Vehicle	Truck/Tempo	Car/Jeep/Rickshaw	Currency	Notes	In-Active
1								<input type="checkbox"/>

Add | Cancel



## Daily Activity

Daily Activity will allow you to enter the routine of loading the stock in your vehicle, reloading it and unloading it with its various details.

The screenshot shows the 'Daily Activity' interface. On the left is a dark red sidebar with the title 'Daily Activity' and three menu items: 'New Load', 'Reload', and 'Unload'. The main content area has a white background with a dark red header bar containing 'Daily Activity'. Below the header, there are two sections: 'Sales Summary (Vehicle Wise)' and 'Special Order'. Each section has a vertical axis label ('Sales Amount' and 'Amount' respectively) and a horizontal axis. Below each axis is a blue button labeled 'Vehicles' and 'Customers' respectively.

## New Load

You can enter the details of the activity of that particular day. It includes the details of which vehicle number is going on which route on that particular day. First tab will show the details of the customer that are covered on that route on that day.

The screenshot shows the 'New Load' form. It has a dark red header bar with a back arrow on the left and 'New Load' on the right. The form contains several input fields and dropdown menus:

- Activity No. - Line: 3 0
- Date - Time - Day: 28/02/2014 03:02:47 Friday
- Load Type: New Load
- Route: Required Field (highlighted in yellow)
- Meter Reading: Start Reading End Reading
- Vehicle No.: ---Select---
- Sales Person: ---Select---
- Driver: ---Select---
- License - Expiry Date: (empty field)

Below the form, there are three tabs: 'Customer', 'Materials', and 'Advance & Expense'. The 'Customer' tab is selected, and it displays the message 'No Customer Found.' in a large, empty text area.



Second tab (material) will show you the details of materials you will load in that particular vehicle with precise quantity and its price. And you have to select the warehouse from which you want to load the materials.

New Load

Activity No. - Line	7 0	Vehicle No.	GJ-27-T-1939
Date - Time - Day	04/03/2014 11:46:38 Tuesday	Sales Person	---Select---
Load Type	New Load	Driver	---Select---
Route	R00020003 - INDIRA NAGAR 1,2,3		
Meter Reading	Start Reading End Reading		

Customer
Materials
Advance & Expense

Vehicle	Warehouse Sudama
---------	------------------

Material Name	Whrs. Qty	Vehicle Qty	Packet	Patti	Bunch	Box	Katta	Unit Price	Total Packet	Total Cost	Notes	Order Qty	Avg Demand	Last Demand
20 GM SALTED WAFERS	25512	0	0	0	0	0	0	4.50	0	0		0		
20 GM MASALA WAFERS	13840	0	0	0	0	0	0	4.50	0	0		0		
20 GM TOMATO WAFERS	13400	0	0	0	0	0	0	4.50	0	0		0		
20 GM CREAM & ONION WAFERS	2728	0	0	0	0	0	0	4.50	0	0		0		
50 GM SALTED WAFERS	12480	0	0	0	0	0	0	8.50	0	0		0		

Third tab (advance & expense) will allow you to enter the details of the advance you give to the sales person.

New Load

Activity No. - Line	5 0	Vehicle No.	GJ-NL-2525
Date - Time - Day	21/02/2014 04:37:40 Friday	Sales Person	---Select---
Load Type	New Load	Driver	---Select---
Route	R00010003 - Isanpur		
Meter Reading	Required Field End Reading		

Customer
Materials
Advance & Expense

Advance	Expense
Advance Date	Expense Date
Advance Taken	Actual Expense
Appox Expense	Attachment
Advance Notes	Expense Notes



## Reload

It allows you to enter the details of material, in case you want to reload your vehicle. First tab (customer) will include the same details of the customers that are to be covered on that route. You have to tick the customers where you still have to cover.

⊕
ReLoad

Activity No. - Line: **7** 1      Vehicle No.: GJ-27-T-2925

Date - Time - Day: 04/03/2014 11:46:38 Tuesday      Sales Person: Ritu Jadav

Load Type: ReLoad      Driver: KIRTIBHAI

Route: R00020003 - INDIRA NAGAR 1,2,3      License - Expiry Date:

Meter Reading: Start Reading      End Reading

**Customer**   Materials   Advance & Expense   Payment Collection

No	Customer	Schedule Type	Location	City	Order	Instruction	Notes	Reload
1	C01840003 - GAYATRI PAN PARLOUR	Schedule	INDIRANAGAR 441-PART-1	Ahmedabad	No Order	No Instruction		<input type="checkbox"/>
2	C01850003 - GURUKRUPA TELICOM	Schedule	INDIRANAGAR 1656-PART-1	Ahmedabad	No Order	No Instruction		<input type="checkbox"/>
3	C01860003 - NAKLAG KIRANA STORE	Schedule	INDIRANAGAR 1655-PART-1	Ahmedabad	No Order	No Instruction		<input type="checkbox"/>

Second tab (material) will show you the details of materials you will reload in that particular vehicle with precise quantity.

⊕
ReLoad

Activity No. - Line: **1** 1      Vehicle No.: GJ-27-T-1956

Date - Time - Day: 27/02/2014 05:31:03 Thursday      Sales Person: RAJANI PARAMAR

Load Type: ReLoad      Driver: RAJANI PARAMAR

Route: R00020003 - INDIRA NAGAR 1,2,3      License - Expiry Date:

Meter Reading: Start Reading      End Reading

**Customer**   **Materials**   Advance & Expense   Payment Collection

Warehouse: Sudama

Material Name	Whrs. Qty	Vehicle Qty	Packet	Patti	Bunch	Box	Katta	Total Packet	Unit Price	Total Cost	Notes	Order Qty	Avg Demand	Last Demand
20 GM SALTED WAFERS	7480	0	0	0	0	0	0	0	4.50	0		0		
20 GM MASALA WAFERS	4784	0	0	0	0	0	0	0	4.50	0		0		
20 GM TOMATO WAFERS	4112	0	0	0	0	0	0	0	4.50	0		0		
20 GM CREAM & ONION WAFERS	1928	0	0	0	0	0	0	0	4.50	0		0		
50 GM SALTED WAFERS	3680	0	0	0	0	0	0	0	8.50	0		0		



Third tab (advance & expense) will allow you to enter the details of the advance you have given to the sales person.

Activity No. - Line: [Yellow highlighted] [Greyed out]

Date - Time - Day: [Greyed out]

Load Type: [Greyed out]

Route: Required Field

Meter Reading: Start Reading [Greyed out] End Reading [Greyed out]

Vehicle No.: GJ-27-T-1956

Sales Person: RAJANI PARAMAR

Driver: RAJANI PARAMAR

License - Expiry Date: [Greyed out]

Customer Materials **Advance & Expense** Payment Collection

**Advance** Expense

Advance Date: Required Field Required Field

Advance Taken: 0

Approx Expense: 0

Advance Notes: [Text area]

Expense Date: Required Field Required Field

Actual Expense: 0

Attachment: Choose File No file chosen

Expense Notes: 0

Fourth tab (payment collection) will allow you to enter the details of the payment which you have collected till now.

Activity No. - Line: 1 2

Date - Time - Day: 27/02/2014 05:31:03 Thursday

Load Type: ReLoad

Route: R00020003 - INDIRA NAGAR 1,2,3

Meter Reading: Start Reading [Greyed out] End Reading [Greyed out]

Vehicle No.: GJ-27-T-1956

Sales Person: RAJANI PARAMAR

Driver: RAJANI PARAMAR

License - Expiry Date: [Greyed out]

Customer Materials **Advance & Expense** **Payment Collection**

**Cash Collection** **Cheque / Bank Transfer / Credit Note - Collection**

Expected Amount	Actual	0
1000x	10x	
500x	5x	
100x	2x	
50x	1x	
20x	Other	

Customer Code	Customer Name	Type	Bank Name	Check Number	Date	Amount	Notes	Ask Deposit
		Cheque						<input type="checkbox"/>



## Unload

At the end of the day, when you want to unload the vehicle or enter the details how much material is left in the vehicle, you have to enter the details here. First tab (customer) will show you the customers.

UnLoad

Activity No. - Line: 7 1

Date - Time - Day: 04/03/2014 11:46:38 Tuesday

Load Type: UnLoad

Route: R00020003 - INDIRA NAGAR 1,2,3

Meter Reading: Start Reading End Reading

Vehicle No.: GJ-27-T-2925

Sales Person: Ritu Jadav

Driver: KIRTIBHAI

License - Expiry Date:

Customer
Materials
Advance & Expense
Payment Collection
Summary

No	Customer	Schedule Type	Location	City	Order	Instruction	Cash Collection	Notes
1	C01840003 - GAYATRI PAN PARLOUR	Schedule	INDIRANAGAR 441-PART-1	Ahmedabad	No Order	No Instruction		
2	C01850003 - GURUKRUPA TELICOM	Schedule	INDIRANAGAR 1656-PART-1	Ahmedabad	No Order	No Instruction		
3	C01860003 - NAKLAG KIRANA STORE	Schedule	INDIRANAGAR 1655-PART-1	Ahmedabad	No Order	No Instruction		

Second tab (material) will show you the details of materials you had loaded at the beginning in that particular vehicle. And it gives you an option here whether you want to shift the materials to the warehouse or keep in the same vehicle.

UnLoad

Activity No. - Line: 7 1

Date - Time - Day: 04/03/2014 11:46:38 Tuesday

Load Type: UnLoad

Route: R00020003 - INDIRA NAGAR 1,2,3

Meter Reading: Start Reading End Reading

Vehicle No.: GJ-27-T-2925

Sales Person: Ritu Jadav

Driver: KIRTIBHAI

License - Expiry Date:

Customer
Materials
Advance & Expense
Payment Collection
Summary

Vehicle  Warehouse Sudama

Material Name	Whrs. Qty	Vehicle Qty	Packet	Patti	Bunch	Box	Katta	Unit Price	Total Packet	Total Cost	Sold Packet	Sold Cost	Notes	Order Qty	Avg Demand	Last Demand
20 GM SALTED WAFERS	25500	7	0	0	0	0	0	4.50	0	0	0	0		0		
20 GM MASALA WAFERS	13840	0	0	0	0	0	0	4.50	0	0	0	0		0		
20 GM TOMATO WAFERS	13400	0	0	0	0	0	0	4.50	0	0	0	0		0		
20 GM CREAM &	2728	0	0	0	0	0	0	4.50	0	0	0	0		0		



Third tab (advance & expense) will allow you to enter the details of the expense incurred by that sales person and show you the details of the advance you had given.

Activity No. - Line: [Yellow Highlighted] [Greyed Out]

Date - Time - Day: [Greyed Out] [Greyed Out] [Greyed Out]

Load Type: [Greyed Out]

Route: Required Field

Meter Reading: Start Reading [Greyed Out] End Reading [Greyed Out]

Vehicle No.: GJ-27-T-1956

Sales Person: RAJANI PARAMAR

Driver: RAJANI PARAMAR

License - Expiry Date: [Greyed Out]

Customer Materials **Advance & Expense** Payment Collection

**Advance**      **Expense**

Advance Date: Required Field [Greyed Out] Required Field [Greyed Out]

Advance Taken: 0

Approx Expense: 0

Advance Notes: [Greyed Out]

Expense Date: Required Field [Greyed Out] Required Field [Greyed Out]

Actual Expense: 0

Attachment: Choose File No file chosen

Expense Notes: 0

Fourth tab (payment collection) will allow you to enter the details of the total payment which you have collected on that day.

Activity No. - Line: 1 [Yellow Highlighted] 2 [Greyed Out]

Date - Time - Day: 27/02/2014 05:31:03 Thursday

Load Type: ReLoad

Route: R00020003 - INDIRA NAGAR 1,2,3

Meter Reading: Start Reading [Greyed Out] End Reading [Greyed Out]

Vehicle No.: GJ-27-T-1956

Sales Person: RAJANI PARAMAR

Driver: RAJANI PARAMAR

License - Expiry Date: [Greyed Out]

Customer Materials **Advance & Expense** **Payment Collection**

**Cash Collection**      **Cheque / Bank Transfer / Credit Note - Collection**

Expected Amount	Actual	0	Customer Code	Customer Name	Type	Bank Name	Check Number	Date	Amount	Notes	Ask Deposit
1000x	10x				Cheque						<input type="checkbox"/>
500x	5x										
100x	2x										
50x	1x										
20x	Other										





Fifth tab (summary) will show you the overall details of the payment, whether you have to take from the sales person/driver or give him any amount. Pending amount is the amount you have to take from him.

Date - Time - Day: 04/03/2014 11:46:38 Tuesday

Load Type: UnLoad

Route: R00020003 - INDIRA NAGAR 1,2,3

Meter Reading: Start Reading End Reading

Sales Person: Ritu Jadav

Driver: KIRTIBHAI

License - Expiry Date:

UnLoad

Customer Materials Advance & Expense Payment Collection **Summary**

Collection Date	04/03/2014	12:13:16
Load Value	22.50	
Advance Taken	0.00	
Unload	0	
Actual Expense	0	
Collected Amt.	0.00	
Collection Amt.	0	
Pending Amt.	22.50	

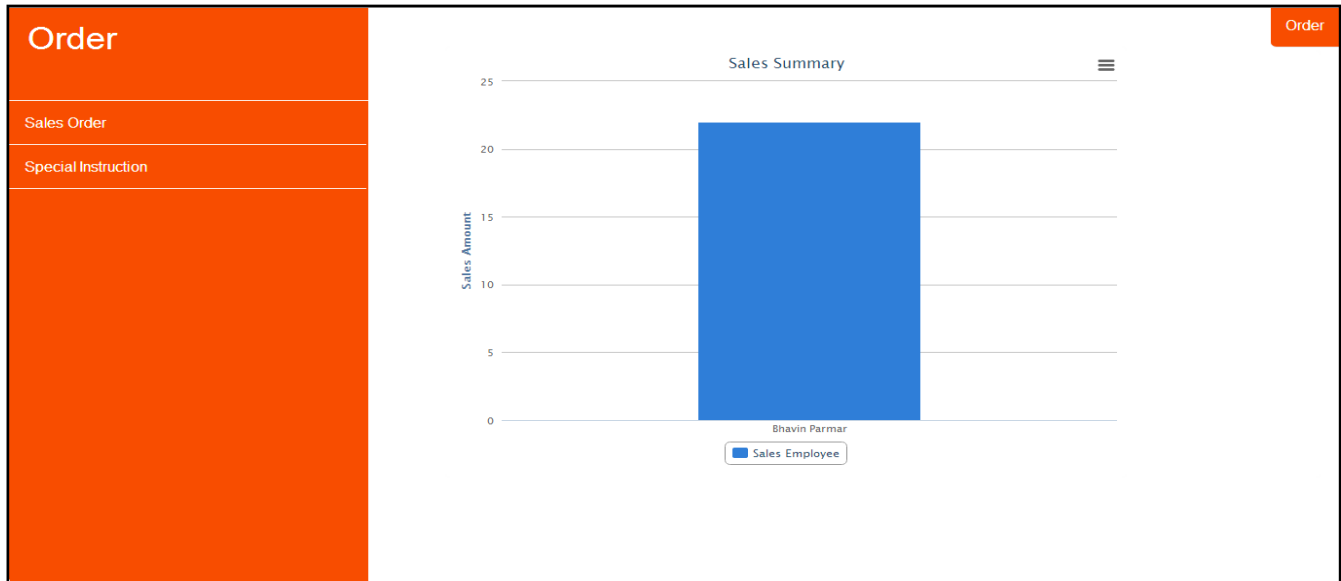
Add

Cancel



## Order

Order will allow you to place an order for any particular customer. It also provides you with the facility to place any special order and get the materials on the specific date you want.



## Sales Order

If your order is regular, then the details of the order will be auto filled by the data you entered in daily activity. To place your order, you need to fill the mandatory fields. If your order is special, then select the warehouse and the quantity of material you require.

Field	Value
Order Type	Regular
Order No. - Date	Auto Generated 18/02/2014
Customer	Required Field
Status	Confirm
Bill To	
Vehicle No.	--Select--
Ship To	
Vehicle Capacity	0 0 0
Route	Required Field
Utilized Capacity	0 0 0
Sales Person	--Select--
Available Capacity	0 0 0
Driver	--Select--
Required Date	
C Form	<input type="checkbox"/>
Schedule Type	Schedule
Notes	
Warehouse	--Select--

No Material Found.



The details of payment of the order placed by you, has to be filled up here.

**Payment**

Payment Mode: --Select--  
 Payment Terms: --Select--  
 Due Date:

Material Cost: 0  
 Discount: 0 % INR  
 Freight: 0  
 Tax: 0  
 Other Amount: 0  
 Rounding: 0  
 Sub Total: 0  
 Paid Amount: 0  
 Unpaid Amount: 0

Cash Collection	
Expected Amount	Actual
1000x	10x
500x	5x
100x	2x
50x	1x
20x	Other

Cheque / Bank Transfer / Credit Note - Collection

Type	Bank Name	Number	Date	Amount	Notes	AskDeposit
--Select--						<input type="checkbox"/>

**Add** **Cancel**

## Special Instruction

Special instruction form helps you to enter the details of the special order given by any customer. It is necessary to fill the mandatory fields.

**Special Instruction**

Customer: Required Field  
 Ship To:   
 Required Date: Required Field  
 Notes:

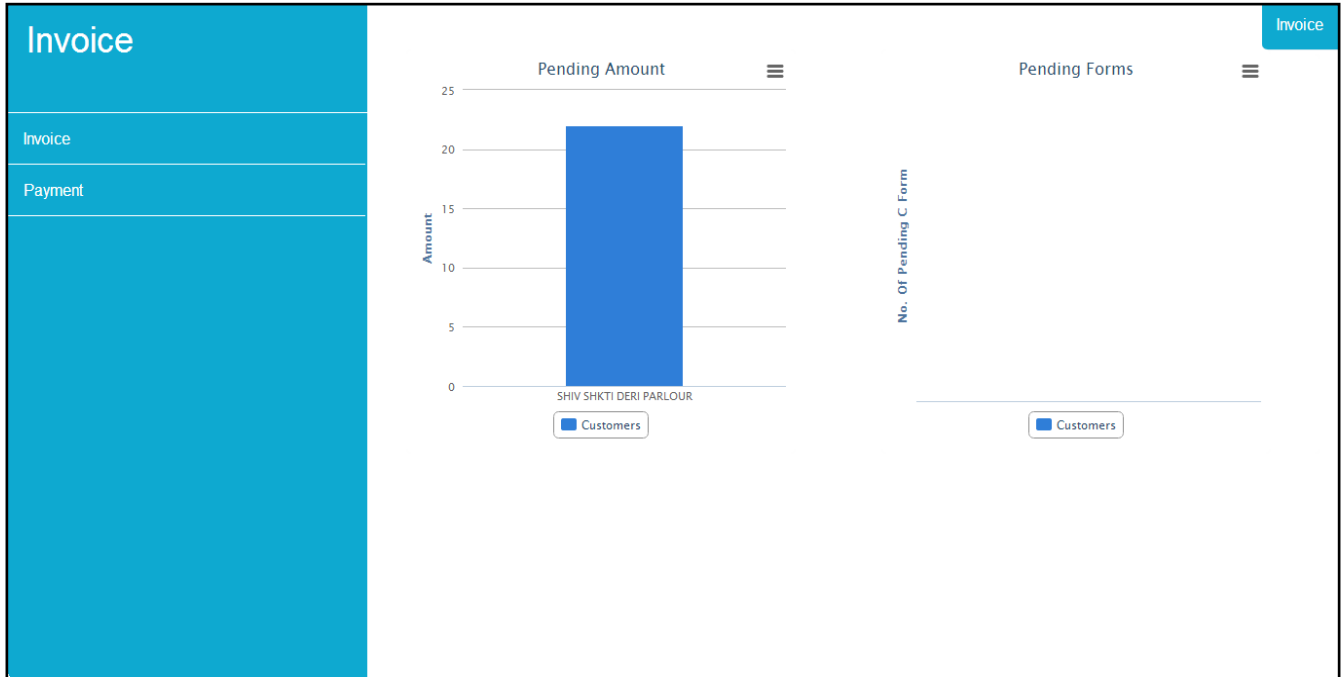
Instruction No.-Date: 1 28/02/2014  
 Schedule Type: Unschedule  
 Status: Open

**Add** **Cancel**



## Invoice

Invoice module contains all the details of invoice that are generated against the order placed. It will also have the details of the payment against invoices.



## Invoice Master

Invoice Master will allow you to your past invoices which are generated against the order you have placed. The invoice no you select, you will be able to view the details of that. First tab (material) will show you the materials in that order no.

The screenshot shows the Invoice Master form with the following fields and tabs:

- Customer:** Text input field.
- Status:** Dropdown menu with "--Select--" selected.
- C Form:** Includes a checkbox, "C Form No.", and "CForm No." input fields.
- Notes:** Text area.
- Invoice No. - Date:** Fields for "Invoice Number" and "Invoice Date".
- Order No. - Date:** Fields for "Order Number" and "Order Date".
- Invoice Due Date:** Text input field.
- Tabs:** "Material" and "Payment". The "Material" tab is active.
- Content:** A message box stating "No Material Found." below the tabs.



Second tab (payment) will show you the details of the payment, if you want to pay that click on payment button.

The screenshot shows the 'Invoice' page with the following fields and values:

- Customer: [Text Field]
- Status: --Select--
- C Form:  C Form No. [Text Field] CForm No. [Text Field]
- Invoice No. - Date: Invoice Number [Text Field] Invoice Date [Text Field]
- Order No. - Date: Order Number [Text Field] Order Date [Text Field]
- Invoice Due Date: [Text Field]
- Notes: [Text Area]

The 'Payment' tab is active, showing the following fields and values:

- Material Cost: [Text Field]
- Discount: % [Text Field] Amount [Text Field]
- Freight: [Text Field]
- Tax Amount: [Text Field]
- Other Amount: [Text Field]
- Rounding: [Text Field]
- Sub Total: [Text Field]
- Payment Mode: --Select--
- Payment Terms: --Select--
- Paid Amount: [Text Field]
- Unpaid Amount: [Text Field]

A red box highlights the 'Payment' button located next to the Unpaid Amount field.

## Payment

Payment will allow you to pay the amount for different invoices. First tab (order/invoice details) will show you the details of all the unpaid invoices; you can tick the invoice you want to pay. By clicking on payment button on invoice page, the same page will open but it will show you that particular invoice only whereas here you can view all the invoices you want.

The screenshot shows the 'Payment' page with the following fields and values:

- Customer: [Text Field]
- Payment Type: --Select--
- Notes: [Text Area]
- Payment No.: 1
- Payment Date: 04/03/2014

The 'Order/Invoice Details' tab is active, showing the following fields and values:

- Order/Invoice Details: No Record Found.
- Add: [Button]
- Cancel: [Button]

The URL at the bottom of the page is localhost:2345/Invoice/Payment.aspx#.

Second tab (payment) will allow you to enter the details how you want to pay the pending amount by cash or cheque, and its details also.

←
Payment

Customer		Payment No.	1
Payment Type	---Select---	Payment Date	04/03/2014
Notes			

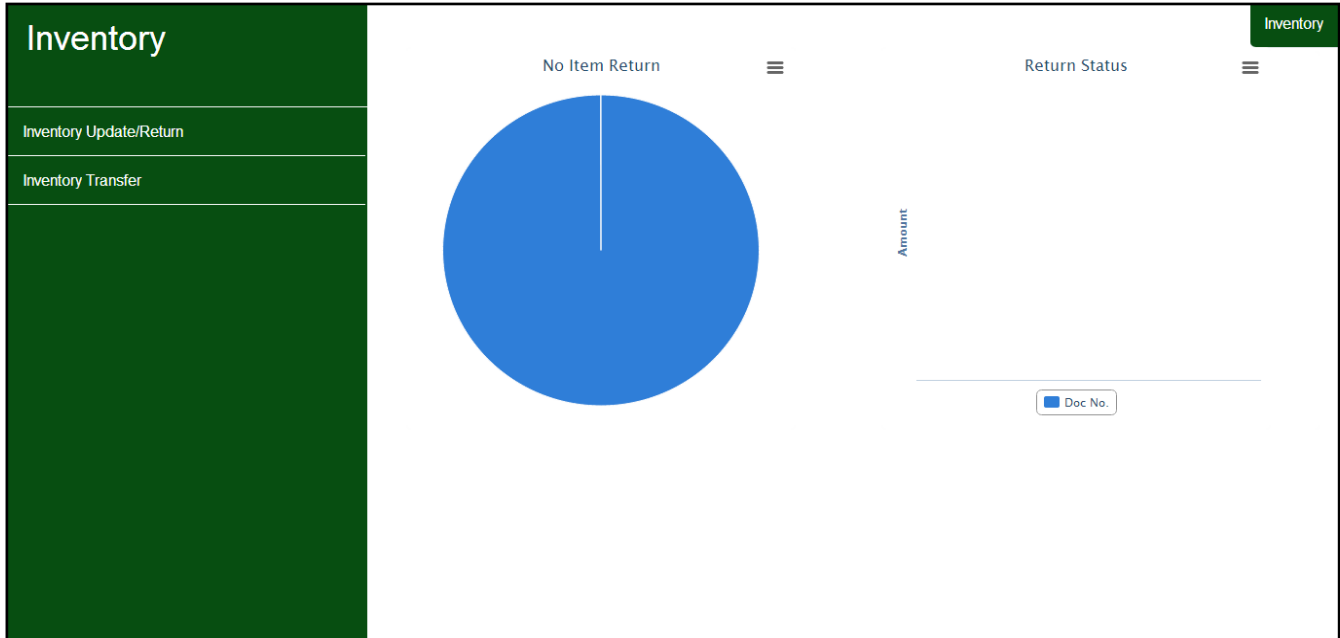
Order/Invoice Details		Payment		Type	Bank Name	Number	Date	Amount	Notes	AskDeposit
1000x		10x		---Select---						<input type="checkbox"/>
500x		5x								
100x		2x								
50x		1x								
20x		Other								

Add
Cancel



## Inventory

Inventory module has all the details of the warehouse and quantity in it. Inventory update and return will allow you enter the details of the material that is added in it and details of the materials which are returned due to various reasons.



## Inventory Update/Return

Inventory update/return will allow you to fill the details of the materials which are returned or updated in any particular warehouse. You will have to fill all the details of the materials with its total cost. You need to specify the reason in case of inventory return.

The screenshot shows the 'Inventory Update/Return' form. At the top right is a dark green header with the title 'Inventory Update/Return'. Below the header is a dark green bar with a back arrow icon on the left and an 'Add Mode' toggle switch. The form has two tabs: 'Inventory Update' (active) and 'Inventory Return'. The form fields are as follows:
 

- Customer:** A text input field with a red border and a yellow background, containing the text 'Required Field'.
- Warehouse Type:** A dropdown menu with the text '--Select--'.
- Warehouse:** A dropdown menu.
- Notes:** A large text area.
- Doc. No - Date:** A text input field with the value '1' and a date field with the value '20/02/2014'.
- Last Counted Date:** A text input field.

 Below the form fields is a status bar that says 'No Material Found.' At the bottom are two buttons: 'Add' and 'Cancel'.



## Inventory Transfer

Inventory transfer will allow you to enter the details of the materials which are transferred from a warehouse to another warehouse or from a vehicle to another vehicle, with the specific reason of transfer and total value of material transferred.

The screenshot shows the 'Inventory Transfer' form with the 'Material' tab selected. The form includes the following fields:

- Transfer Type:** --Select-- (highlighted with a red box)
- Doc. No-Date:** 1 / 20/02/2014
- From Warehouse:** (empty dropdown)
- Transfer Reason:** Heavy Rain
- To Warehouse:** (empty dropdown)
- Notes:** (empty text area)

Below the form, there is a 'Material' section with a 'Full Transfer' button and the text 'No Material Found.'.

Sales person & collection tab will have the details that transfer has been done from which sales person to which sales person and how is the collection taken; by cash or cheque and other details are also included in it.

The screenshot shows the 'Inventory Transfer' form with the 'Sales Person & Collection' tab selected. The form includes the following fields:

- Transfer Type:** Vehicle
- Doc. No-Date:** 1 / 17/02/2014
- From Warehouse:** Gj-R-1020
- Transfer Reason:** --Select--
- To Warehouse:** --Select--
- Material Value:** (empty text area)
- Notes:** (empty text area)

Below the form, there is a 'Sales Person & Collection' section with two columns: 'Sales Person' and 'Collection'.

Sales Person		Collection	
Transfer From	--Select--	Cash	Amount
Transfer To	--Select--	Cheque	Qty. Amount
Transferred Device	<input type="checkbox"/>	Credit Note	Qty. Amount
		Bank Transfer	Qty. Amount
		Total	Qty. Amount

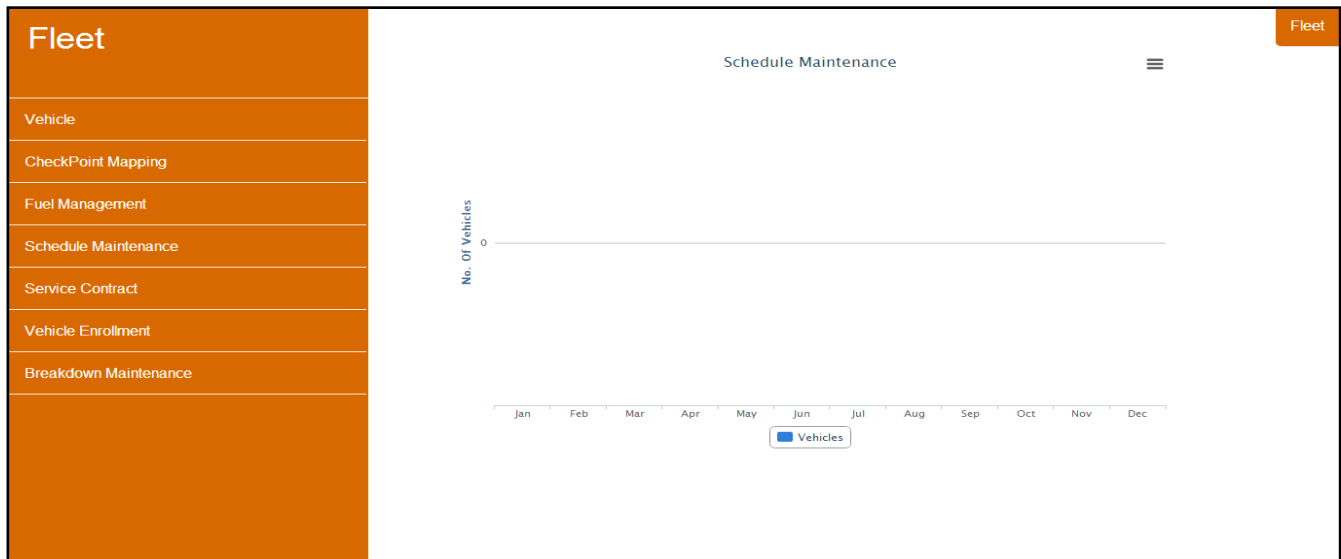
At the bottom of the form, there are 'Add' and 'Cancel' buttons.





## Fleet

Fleet gives you all the details of your vehicles. You can enter the details of new vehicle from vehicle master. Schedule maintenance and breakdown maintenance has the details of the maintenance of the vehicles. Fuel management monitors the fuel of the vehicles. Service contract and vehicle enrollment includes the details of the vehicles that are enrolled for contact based services.



## Vehicle Master

Vehicle Master will allow you to enter the details of any new vehicle or update the details of any existing vehicles. It will have all the details of vehicle its type, fuel type, average and its image. You can also attach soft copies of various documents of that particular vehicle. For example, RTO Book, PO of that vehicle, etc

The screenshot shows the 'Vehicle Master' form. At the top left is a back arrow and 'Add Mode' toggle. The form is divided into several sections:

- Vehicle Details:** Includes fields for 'Vehicle No.' (with a 'Vehicle Number' placeholder), 'Is Active' (checkbox), 'Vehicle Type - Wheel Type' (dropdown with 'Rickshaw' selected), 'Select Wheel Type' (dropdown), 'Fuel Type - Average' (dropdown with 'Select Fuel Type' selected), 'Kms.' (input), and 'Size' (fields for 'Length', 'Breadth', and 'Height').
- Image Upload:** A 'PHOTO NOT AVAILABLE' placeholder with a 'Choose File' button and 'No file chosen' text.
- Notes:** A text area for entering notes.
- Attachment Section:** Contains 'Attachment Name' (input), 'Reminder Date' (input), 'File Upload' (with 'Choose File' button and 'No file chosen' text), and another 'Notes' text area.
- Footer:** A message 'No Attachment Found.' and an 'Add' button.



## Check Point Mapping

Check point mapping will allow you to enter the details of checkpoint of particular vehicle.

←
CheckPoint Mapping

Vehicle Type:  Fuel Type:  Maintenance Type:

Check Point	Expcted Value	Notes

## Fuel Management

Itwill help you to manage fuel of the vehicles. You will have to fill all the mandatory fields before saving the details.

←
Fuel Management

Vehicle No.	<input type="text" value="Required Field"/>	Date	<input type="text" value="17/02/2014"/>
Fuel Type	<input type="text" value="---Select---"/>	Time	<input type="text" value="04:03:23"/>
Average	<input type="text" value="Required Field"/>	Quantity	<input type="text" value="Required Field"/>
Driver Name	<input type="text" value="---Select---"/>	Unit Price	<input type="text" value="Required Field"/>
Fuel Station - Location	<input type="text" value="Required Field"/>	Payment	<input type="text" value="Required Field"/> <input type="text" value="---Select---"/>
Previous Meter Reading	<input type="text" value="Required Field"/>	Current Meter Reading	<input type="text" value="Required Field"/>
Current Mileage	<input type="text"/>	Notes	<input type="text"/>



## Schedule Maintenance

Schedule maintenance will allow you to enter the details of the vehicles which are scheduled for maintenance. You will have to fill the mandatory fields and you can also fill up the details of maintenance here.

←
Schedule Maintenance

<p>Vehicle No. <input style="border: 1px solid red; background-color: yellow;" type="text" value="Required Field"/></p> <p>Maintenance Type <input style="border: 1px solid red;" text"="" type="text" value="Kms."/> <input type="text" value="17/02/2014"/> <input type="text" value="05:13:00"/></p> <p>Maintenance. By <input type="text"/></p> <p>Contract <input type="text" value="No Contract Found"/></p> <p>Notes <input type="text"/></p>	<p>Type <input 1px="" border:="" red;"="" solid="" style="border: 1px solid red;" text"="" type="text" value="Kms."/> <input type="text" value="Date"/> <input type="text" value="Time"/></p> <p>Amount Paid <input type="text" value="INR"/></p>
--	---

**Attachment**

Attachment Name <input type="text"/>	Reminder Date <input type="text"/>
File Upload <input type="button" value="Choose File"/> No file chosen	Notes <input type="text"/>

## Service Contract

Service contract will allow you to add details of the service contract of the particular vehicle. You will have to fill all the mandatory fields to add those details.

←
Service Contract

<p>Vehicle Number <input style="border: 1px solid red; background-color: yellow;" type="text" value="Required Field"/></p> <p>Contract No. <input style="border: 1px solid red;" type="text"/></p> <p>Company Name <input style="border: 1px solid red;" type="text" value="Required Field"/></p> <p>Contact No. <input style="border: 1px solid red;" type="text" value="Required Field"/></p> <p>Start Date <input style="border: 1px solid red;" type="text" value="Required Field"/></p> <p>Agent <input type="text"/></p> <p>Notes <input type="text"/></p>	<p>Type <input style="border: 1px solid gray;" text"="" type="text" value="---Select---&lt;/p&gt; &lt;p&gt;Base Contract No. &lt;input type="/></p> <p>Address <input type="text"/></p> <p>End Date <input style="border: 1px solid red;" type="text" value="Required Field"/></p> <p>Amount <input type="text" value="INR"/></p>
--	---



## Vehicle Enrollment

You can enter the details of a new vehicle here so that it gets enrolled for maintenance. It is necessary to enter the mandatory fields to save its details.

The screenshot shows the 'Vehicle Enrollment' form. At the top right, there is a 'Vehicle Enrollment' tab. Below it is an 'Add Mode' toggle. The form contains the following fields:

- Vehicle No.: Required Field (highlighted in yellow)
- Maintenance Type: ---Select---
- Schedule Date: 17/02/2014
- Maintenance Dist.: Kms
- Contract: (empty)
- Notes: (empty text area)
- Type: ---Select---
- Maintenance Mode: ---Select---
- Schedule Time: 05:31:43
- Maintenance (Dur.): Days
- Is Active:

At the bottom, there are 'Add' and 'Cancel' buttons.

## Breakdown Maintenance

You can enter the details of the vehicles that have broken down due to some reason. It is necessary to fill up the mandatory fields. In breakdown tab, you will have to fill the details of the breakdown that has occurred.

The screenshot shows the 'Breakdown Maintenance' form. At the top right, there is a 'Breakdown Maintenance' tab. Below it are tabs for 'BreakDown', 'Claim', and 'Insurance'. The form contains the following fields:

- Vehicle No.: Required Field (highlighted in yellow)
- Type: ---Select---
- Policy No.: (empty)
- Breakdown Date - Time: Required Field (highlighted in red)
- Driver Name: ---Select---
- Reason: (empty text area)
- Claim date: Required Field (highlighted in red)
- Maintenance By: (empty)
- Maintenance Date - Time: Required Field (highlighted in red)
- Amount Paid: Required Field (highlighted in red)



In claim (tab), you will have to enter the details of claim and fill the mandatory fields to save the details.

Breakdown Maintenance

Vehicle No. Required Field Type ---Select---

**BreakDown** Claim Insurance

Policy No.

Claim Registration Date - Time Required Field Required Field

Reg. Reference No. Required Field

Status Open

Doc Submission Date - No.

Expected Process Time

Inspector Name

Contact No.

Claim Pass Date

In insurance (tab), you will have to enter the details of insurance and its details and to save it; you need to enter all the mandatory fields.

Breakdown Maintenance

Vehicle No. Required Field Type ---Select---

**BreakDown** Claim Insurance

Policy No.

Claim Registration Date - Time Required Field Required Field

Reg. Reference No. Required Field

Status Open

Doc Submission Date - No.

Expected Process Time

Inspector Name

Contact No.

Claim Pass Date



## Finance

Finance module gives you details of the account. Tax master allows you to enter the details of any new tax, and it's mapped on the page of tax mapping. Credit notes, collected cheques give you the details of the credit notes and cheques respectively.

The screenshot displays the Finance module interface. On the left is a dark purple sidebar with the following menu items: Finance, Chart of Account, Collected Cheques, Tax, Credit Note, Tax Mapping, Journal Entry, GL Group Creation, and Payment Terms. The main content area is white and features two large blue circles. The left circle is labeled 'No Cheques' and the right circle is labeled 'No Credit Notes'. Both circles have a vertical white line through their center. In the top right corner of the main area, there is a 'Finance' label and a hamburger menu icon.

## Chart of Account

Chart of account is to enter the details of the GL account allocated to particular customer or employee or any other GL account.

The screenshot shows the 'Chart of Account' form for 'Balaji Wafers Pvt. Ltd.'. The form is titled 'Add Mode' and contains the following fields:

- GL Code: Required Field
- GL Name: Required Field
- GL Type: ---Select---
- GL Sub-Type: ---Select---
- GL Group: ---Select---
- Parent GL: ---Select
- Credit Days: [Empty]
- GL Amount: INR
- Is Active:
- Notes: [Empty]

At the bottom of the form are 'Add' and 'Cancel' buttons. To the right of the form is a preview window showing the 'Balaji Wafers Pvt. Ltd. Chart of Account' table. The table has columns for 'No.', 'GL Details', and 'Amount'. The first row shows '1' in the 'No.' column and '-' in the 'Amount' column.

At the bottom left of the screenshot, there is a status bar that reads 'Waiting for 27.54.170.37...'.



## Collected Cheques

Collected cheques will have the details the cheques that are collected and you can select the cheques you want to deposit.

The screenshot shows a web interface for 'Collected Cheques'. At the top right, there is a purple tab labeled 'Collected Cheques'. Below the tab, a message box displays 'No Record Found.'. Underneath the message, there are two purple buttons: 'Deposit' and 'Cancel'.

## Tax

Tax will allow you to enter the details of the new tax if you want to add any. The details of tax are mandatory to fill, so that the details are saved.

The screenshot shows a web interface for 'Tax'. At the top right, there is a purple tab labeled 'Tax'. Below the tab, there is an 'Add Mode' toggle switch. The form contains several fields: 'Name' (Required Field), 'Description', 'Is Active' (checked), 'Percent' (Required Field), 'Calculation Formula' (Required Field), and 'Type' (---Select---). Below the form is a table with the following structure:

Tax Name	Description	Percent	In Active
			<input type="checkbox"/>

At the bottom of the form, there are two purple buttons: 'Add' and 'Cancel'.



## Credit Note

Credit note will help you add the details of the credit note. It is necessary to enter the mandatory fields which includes terms & conditions of that particular credit note.

←
Credit Note

Credit Note No.	1
Credit Note Date	18/02/2014
Customer	Required Field
Credit Note Type	--Select--
Amount	Required Field
Valid Till	
Terms & Conditions	--Select--
Status	--Select--

Add
Cancel

## Tax Mapping

Tax mapping is for checking that which tax is applied for which state and which item group. This tax will be applied on the order you place.

←
Tax Mapping

Plant	--Select--	State	--Select--
Item Group	--Select--	Tax	--Select--
Is Active	<input checked="" type="checkbox"/>		

Add
Clear
Cancel

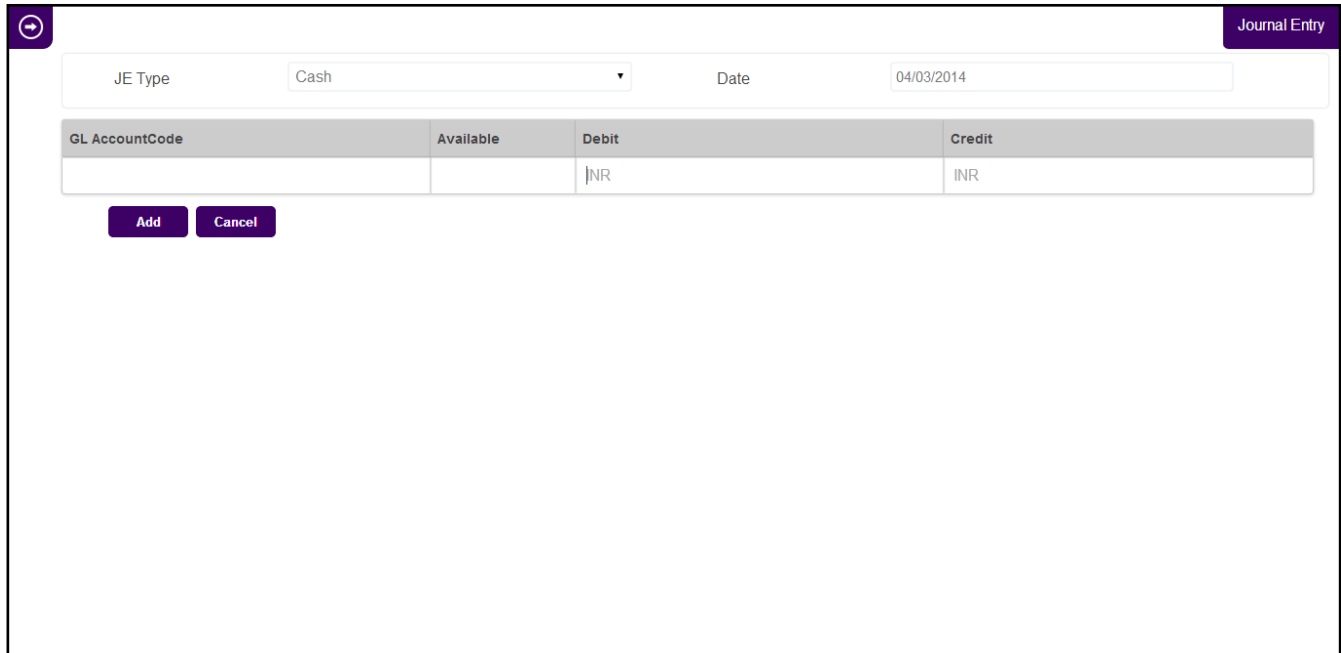
No Other Tax Found.





## Journal Entry

Journal entry is for entering the transactions done with the customer or employee. It will also have the details of credit and debit in that particular GL account.



Journal Entry

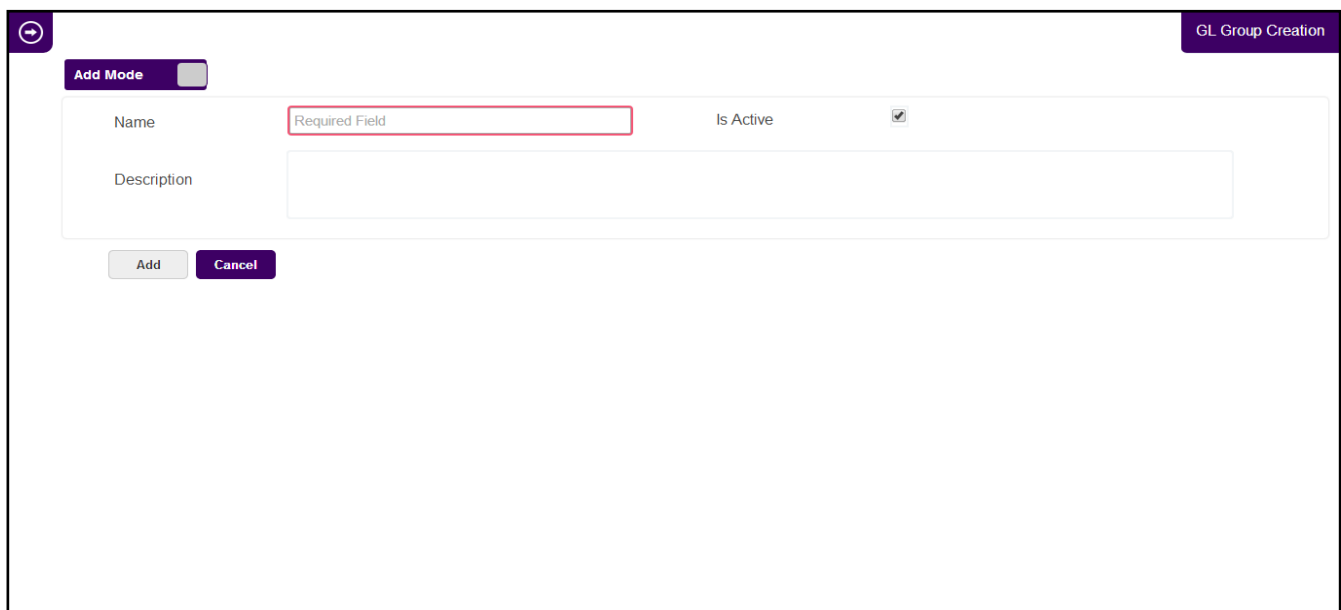
JE Type: Cash Date: 04/03/2014

GL AccountCode	Available	Debit	Credit
		INR	INR

Add Cancel

## GL Group Creation

You can add new GL group from here as well as update the existing GL group.



GL Group Creation

Add Mode

Name: Required Field Is Active:

Description:

Add Cancel



## Payment Terms

You can add new payment terms as well as update the existing terms.

Payment Terms  
**Add Mode**   
Name  Is Active   
Description   
**Add** **Cancel**



## Marketing

Marketing has all the details related to the marketing of products and reviews of customers. It also has the details of the company in company profile.



## Campaign Creation

Campaign creation will allow you to add details of new campaign as well as update the existing campaign.

The screenshot shows the Campaign Creation form. At the top right, it is labeled 'Campaign Creation'. On the left, there is a toggle for 'Add Mode' which is currently turned off. The form contains the following fields and options:

- Name:** A text input field with a red border and the text 'Required Filed' inside.
- Start Date:** A date input field.
- Target People:** A dropdown menu with options: Consumer, Retailer, Dealer, and Distributor.
- Description:** A large text area.
- Is Active:** A checkbox that is checked.
- End Date:** A date input field.
- Type:** A dropdown menu with options: Product, Service, and Other.

At the bottom of the form, there are two buttons: 'Add' and 'Cancel'.



## Campaign Survey

Campaign survey will help you fill up the details of the campaign carried out by any particular company.

←
Campaign Survey

Campaign:

Company Name:

Industry:

Website:

Contact Name:

Notes:

Phone Number:

E-Mail:

Follow-Up Date:

Subscription to Newsletter:

No.	Question Name	Action
1	Sale Max 500 Wafer packets	<input type="button" value="Yes"/> <input type="button" value="No"/>

## Client Feedback

Client feedback form is to fill up the details of feedback given by any customer. You can add the details of it here.

←
Client FeedBack

FeedBack From:

Name:

Industry:

Website:

Notes:

Contact Name:

Phone Number:

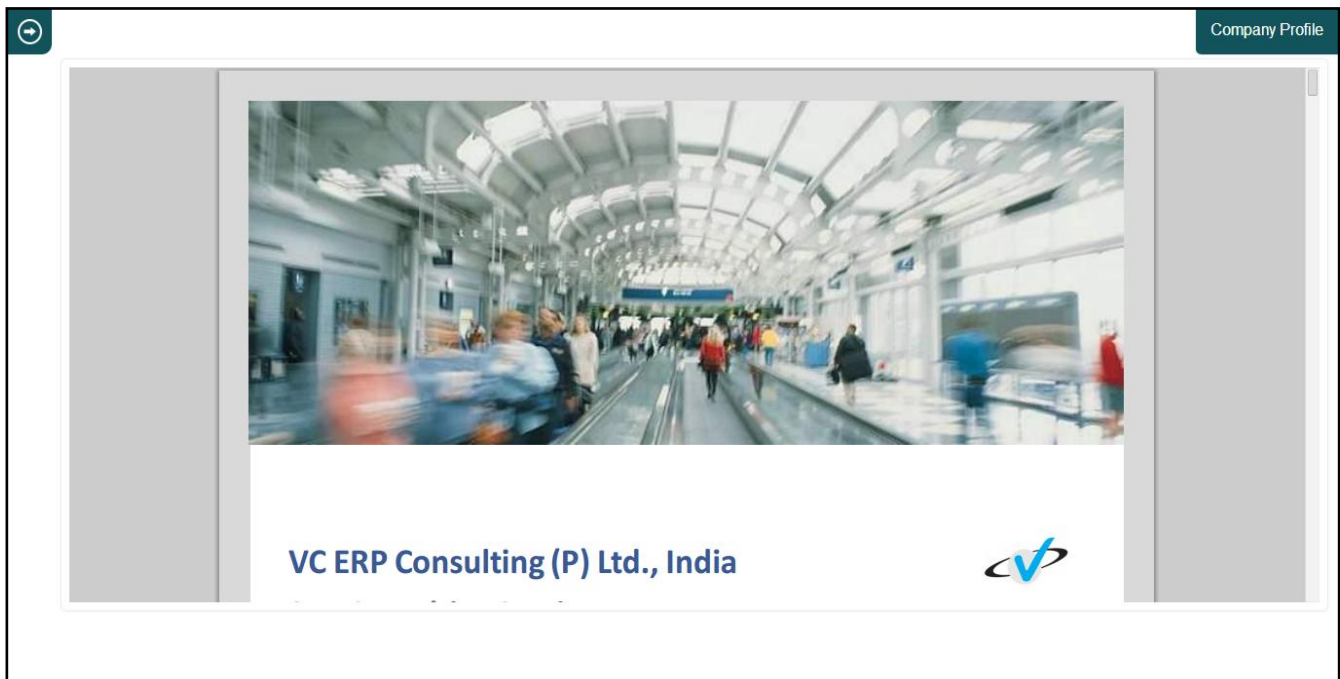
E-Mail:

FeedBack Type:



## Company Profile

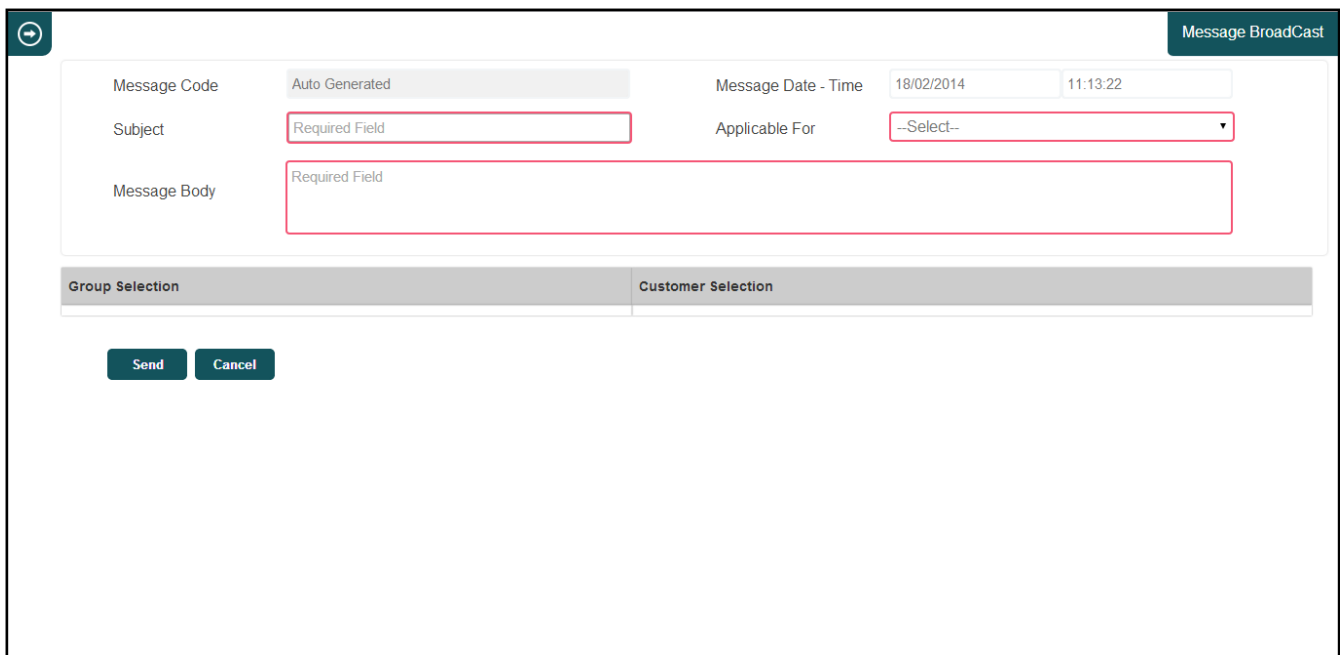
Company profile will show you the details of the company.



The screenshot shows a web interface for a company profile. At the top right, there is a tab labeled "Company Profile". Below the tab is a large image of a modern airport terminal with a glass and steel structure. Underneath the image, the text "VC ERP Consulting (P) Ltd., India" is displayed in a blue font. To the right of the text is a logo consisting of a blue checkmark inside a circle with a swoosh. The interface has a clean, professional look with a light gray background.

## Message Broadcast

Message broadcast will help you enter any new message and send it to the particular group and customers selected from that group.



The screenshot shows a web interface for sending a message broadcast. The form is titled "Message BroadCast" in the top right corner. It contains the following fields:

- Message Code:** Auto Generated
- Message Date - Time:** 18/02/2014 11:13:22
- Subject:** Required Field (indicated by a red border)
- Applicable For:** --Select-- (dropdown menu)
- Message Body:** Required Field (indicated by a red border)

Below the form, there are two sections for selection:

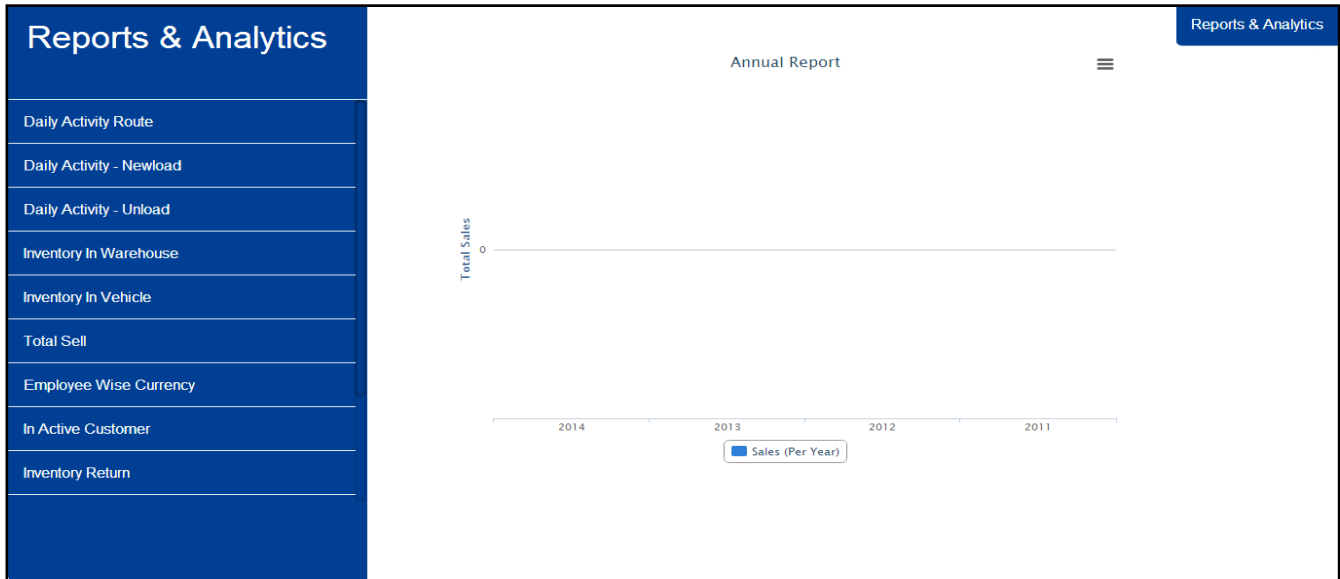
- Group Selection**
- Customer Selection**

At the bottom of the form, there are two buttons: "Send" and "Cancel".



## Report & Analytics

This will show you all the reports which are useful at transaction level as well as master level.



## Daily Activity Route

Daily activity route will give you a report of the activity carried out on that particular date, by that particular vehicle. It also gives the list of customers which the sales person has to visit.

The screenshot shows the 'Daily Activity Route' report form. On the left, there are input fields for 'Date' (01/03/2014) and 'Vehicle' (GJ-27-T-1956), along with a 'Generate Report' button. The main area contains a 'Daily Activity' section with fields for Activity No., Date - Time - Day, Vehicle Number, Load Type, Route, Sales Person, Driver, Meter Reading, License Expiry - Date, and Material Amount. Below this is a table with columns: No., Customer Code, Customer Name, Address, Contact Person, Phone, Bill No, Amount (₹), and Remarks. The table has one row with '1' in the 'No.' column. Below the table is a 'No of Customer' field.

No.	Customer Code	Customer Name	Address	Contact Person	Phone	Bill No	Amount (₹)	Remarks
1								



## Daily Activity – New Load

Daily activity new load will give you a report of the activity carried out on that particular date, by that particular vehicle. It will give the details of the materials loaded in that vehicle in precise quantity, with its total value.

Daily Activity - Newload

01/03/2014  
 GJ-27-T-1956

**DAILY ACTIVITY - NEW LOAD**

Activity No. :  
 Date - Time - Day : - - -  
 Vehicle Number :  
 Load Type :  
 Route :  
 Sales Person :  
 Driver :

Meter Reading :  
 Licence Expiry - Date :

No.	Material	Vehicle Qty	Packet	Patti	Bunch	Box	Katta	Total Packet	Price (₹)	Amount (₹)
1										
<b>Total</b>										

## Daily Activity – Unload

Daily activity unload will give you a report of the activity carried out on that particular date, how much material is to be unloaded and how much amount is collected by cash and cheque, with its details.

Daily Activity - Unload

01/03/2014  
 GJ-27-T-1956

**DAILY ACTIVITY - UNLOAD**

Activity No. :  
 Date - Time - Day : - - -  
 Vehicle Number :  
 Load Type :  
 Route :  
 Sales Person :  
 Driver :

Meter Reading :  
 Licence Expiry - Date :

No.	Material	Packet	Patti	Bunch	Box	Katta	Price (₹)	Unload Packet	Unload Amt (₹)	Sold Packet	Sold Amt (₹)
1											
<b>Total</b>											

Cash Collection :

No.	Name	1000	500	100	50	20	10	5	2	1	Other	Amount (₹)
1												

Check Collection :

No.	Customer Code	Customer Name	Bank	Date	Ask & Deposit	Amount (₹)
1						
<b>Total</b>						



## Inventory in Warehouse


Inventory in warehouse gives you a report of the total material available in a particular warehouse.

Warehouse
Sudama
Inventory In Warehouse

Generate Report

**INVENTORY IN WAREHOUSE**

Warehouse - Sudama



**Balaji Wafers Pvt. Ltd.**  
 ,, Narola,  
 Ahmedabad-  
 Gujarat,INDIA.

No.	Material	Packet	Patti	Bunch	Box	Katta	Total Packet	Price (₹)	Amount (₹)
1	POTATO WAFERS	384	0	0	226	0	29354		179613.00
	20 GM SALTED WAFERS	-3	0	0	43	0	6879	4.50	30955.50
	20 GM MASALA WAFERS	75	0	0	28	0	4555	4.50	20497.50
	20 GM TOMATO WAFERS	152	0	0	24	0	4112	4.50	18504.00
	20 GM CREAM & ONION WAFERS	8	0	0	12	0	1928	4.50	8676.00
	50 GM SALTED WAFERS	0	0	0	37	0	3680	8.50	31280.00
	50 GM MASALA WAFERS	72	0	0	49	0	4880	8.50	41480.00
	45 GM TOMATO WAFERS	40	0	0	16	0	1600	8.50	13600.00
	45 GM CHAT CHASKA WAFERS	0	0	0	0	0	0	8.50	0.00
	45 GM CREAM & ONION WAFERS	40	0	0	17	0			
	150 GM TOMATO WAFERS	0	0	0	0	0	0	25.00	0.00

## Inventory in Vehicle


Inventory in vehicle gives you a report of the total material available in a particular vehicle.

Vehicle
GJ-27-T-1956
Inventory In Vehicle

Generate Report

**INVENTORY IN VEHICLE**

Vehicle No. - GJ-27-T-1956



**Balaji Wafers Pvt. Ltd.**  
 ,, Narola,  
 Ahmedabad-  
 Gujarat,INDIA.

No.	Material	Packet	Patti	Bunch	Box	Katta	Total Packe	Price (₹)	Amount (₹)
1	POTATO WAFERS	424	0	0	6	0	2		9.00
	20 GM SALTED WAFERS	123	0	0	3	0	0	4.50	0.00
	20 GM MASALA WAFERS	69	0	0	1	0	2	4.50	9.00
	20 GM TOMATO WAFERS	120	0	0	0	0	0	4.50	0.00
	20 GM CREAM & ONION WAFERS	0	0	0	0	0	0	4.50	0.00
	50 GM SALTED WAFERS	32	0	0	1	0	0	8.50	0.00
	50 GM MASALA WAFERS	8	0	0	1	0	0	8.50	0.00
	45 GM TOMATO WAFERS	24	0	0	0	0	0	8.50	0.00
	45 GM CHAT CHASKA WAFERS	0	0	0	0	0	0	8.50	0.00
	45 GM CREAM & ONION WAFERS	48	0	0	0	0			
	150 GM TOMATO WAFERS	0	0	0	0	0	0	25.00	0.00





## Total Sale

It will give you a report of the products sold till in that particular duration with the details of the materials.

←
Total Sell

From Date

To Date

**Generate Report**

**TOTAL SELL**

From 01/03/2014 To 01/03/2014

No.	Material	Vehicle Qty	Packet	Patti	Bunch	Box	Katta	Total Packet	Price (₹)	Amount (₹)
1										
<b>Total</b>										

## Employee Wise Currency

Employee wise currency will give you the report of the currency which employee gives you. It will generate a report of currency according to notes.

←
Employee Wise Currency

From Date

To Date

**Generate Report**

**EMPLOYEE'S INCOME**

From 01/03/2014 To 01/03/2014

No.	Name	1000	500	100	50	20	10	5	2	1	Other	Amount (₹)
1												
<b>Total</b>												



## In-active Customers

In-active customers will give you a report of the customers which have not done any activity since past many days.

In Active Customer

Type
Company ▼

INACTIVE CUSTOMERS

Type -

No.	Customer Code	Customer Name	Customer Group	City	Phone	Email
1						

## Inventory Return

Inventory return will give you a report of material which is returned due to some reason. It has the details of that material and total quantity returned.

Inventory Return

From Date

To Date

Reason
Heavy Rain ▼

Customer
Mahakali Sales Agency ▼

INVENTORY RETURN

From 01/03/2014 To 06/03/2014

No.	Material	Return Qty	Unit	Notes
	Reason :			
	Customer :			
1	-		Packet	
	<b>Sub Total</b>			
	<b>Grand Total</b>			

