

ERP Features

Finance and Accounting

- **Setup and Opening**
 - Introduction
 - Accounts Settings
 - Company
 - Chart Of Accounts
 - Opening Balance in Accounts
 - Cost Center
 - Fiscal Year
 - Accounting Period
 - Finance Book
 - Accounting Dimensions
 - Bank
 - Bank Account
 - Accounting Dimensions
- **Journals and Payments**
 - Journal Entry
 - Payment Entry
 - Payment Request
 - Mode of Payment
 - Payment Terms
 - Payment Terms Template
 - Advance Payment Entry
 - Inter Company Journal Entry
- **1.3 Billing**
 - Sales Invoice
 - Purchase Invoice
 - Inter Company Invoices
 - Credit Note
 - Debit Note
 - Credit Limit
- **1.4 Taxes**
 - Item Tax Template
 - Tax Withholding Category
 - Tax Rule
 - Tax Category
- **1.5 Pricing**
 - Pricing Rule

- Promotional Scheme
- Exchange Rate Revaluation
- Currency Exchange
- Currency
- **1.6 Retail Operations**
 - POS Profile
 - Point Of Sales
 - POS Cashier Closing
- **1.7 Tools**
 - Bank Reconciliation
 - Payment Reconciliation
 - Period Closing Voucher
 - Payment Order
- **1.8 Reports**
 - Accounting Reports
- **1.9 Advanced**
 - Multi Currency Accounting
 - Deferred Revenue
 - Deferred Expense
 - Bank Guarantee
 - Loyalty Program
 - Budgeting
 - Auto Repeat
 - Invoice Discounting
- **1.10 Subscription**
 - Subscription
 - Subscription Plan
 - Subscription Settings
- **1.11 Shareholder Management**
 - Shareholder
 - Share Transfer
 - Share Reports
- **1.12 GST**
 - GST Setup
 - GST Reminders
 - GST 3B
 - Auto generating e-Way Bill

Inventory and Stock

- **1.1 Basics**
 - Introduction
 - Warehouse
 - Item
 - Opening Stock

- Accounting Of Inventory Stock
- Price Lists
- Stock Settings
- **1.2 Item Variants**
 - Item Variants
 - Item Attribute
- **1.3 Setup**
 - Item Price
 - Item Group
 - Unit of Measure (UoM)
 - Manufacturer
- **1.4 Stock Transactions**
 - Material Request
 - Purchase Receipt
 - Delivery Note
 - Stock Entry
 - Packing Slip
 - Retaining Sample Stock
 - Landed Cost Voucher
 - Pick List
- **1.5 Serial and Batch Number**
 - Serial Number
 - Batch
 - Installation Note
- **1.6 Tools**
 - Quality Inspection
 - Stock Reconciliation
 - Quick Stock Balance
- **1.7 Return**
 - Sales Return
 - Purchase Return
- **1.8 Advanced**
 - Delivery Trip
 - Projected Quantity
 - Perpetual Inventory

CRM

- **1.1 Sales**
 - Lead
 - Opportunity
 - Customer
 - Contact
 - Address
 - Campaign

- Email Campaign
 - Newsletter
- **1.2 Reports**
 - CRM Reports
- **1.3 Setup**
 - Lead Source
 - Opportunity Type
 - Sales Stage
 - Sales Person
 - Customer Group
 - Email Group
 - Contract

Selling

- **Sales**
 - Quotation
 - Sales Order
 - Brand
 - Blanket Order
 - Sales Analytics
 - Sales Partner
 - Territory
 - Coupon Code
- **1.2 Setup**
 - Selling Settings
 - Item Price
 - Shipping Rule
 - Product Bundle
 - Sales Person Target Allocation
 - Sales Taxes and Charges Template

Purchase

- **Purchase Cycle**
 - Request For Quotation
 - Purchase Order
 - Purchase Taxes and Charges Template
- **Supplier**
 - Supplier
 - Supplier Quotation
 - Supplier Scorecard

- **Setup**
 - Buying Settings
 - Supplier Group

Human Resources and Payroll

- **Employee**
 - Employee
 - Employment Type
 - Branch
 - Department
 - Designation
 - Employee Grade
 - Employee Group
 - Employee Health Insurance
- **1.2 Attendance**
 - Attendance
 - Employee Attendance Tool
 - Attendance Request
 - Upload Attendance
 - Auto Attendance
- **1.3 Leaves**
 - Leave Management
 - Holiday List
 - Leave Type
 - Leave Period
 - Leave Policy
 - Leave Allocation
 - Leave Application
 - Compensatory Leave Request
 - Leave Encashment
 - Leave Block List
- **1.4 Recruitment**
 - Staffing Plan
 - Job Opening
 - Job Applicant
 - Job Offer
- **1.5 Training**
 - Training Program
 - Training Event
 - Training Result
 - Training Feedback
- **1.6 Employee Lifecycle**

- Employee Lifecycle Management Introduction
- Employee Onboarding
- Employee Promotion
- Employee Separation
- Employee Transfer
- Employee Skill Map
- **1.7 Payroll**
 - Payroll Management
 - Payroll Period
 - Salary Component
 - Salary Structure
 - Salary Structure Assignment
 - Payroll Entry
 - Additional Salary
 - Retention Bonus
 - Employee Incentive
- **1.8 Employee Tax and Benefits**
 - Employee Tax Exemption Declaration
 - Employee Tax Exemption Proof Submission
 - Employee Benefit Application
 - Employee Benefit Claim
- **1.9 Performance**
 - Appraisal
 - Energy Point System
 - 1.10 Expense Claims
 - Expense Claim
 - Employee Advance
- **1.11 Loans**
 - Loan Management
 - Loan Type
 - Loan Application
 - Loan
- **1.12 Shift Management**
 - Shift Management
- **1.13 Fleet Management**
 - Fleet Management
 - Vehicle
 - Vehicle Log
- **1.14 Settings**
 - HR Settings
 - Daily Work Summary Group
 - 1.15 Reports
 - Human Resources Reports

Asset

- **Asset Management**
 - Asset
 - Asset Category
 - Asset Location
 - Asset Movement
- **1.2 Asset Maintenance**
 - Asset Maintenance Team
 - Asset Maintenance
 - Asset Maintenance Log
 - Asset Repair
- **1.3 Asset Transactions**
 - Asset Value Adjustment
 - Purchasing an Asset
 - Selling an Asset
- **1.4 Discarding Assets**
 - Asset Depreciation
 - Scrapping an Asset
- **1.5 Assets Reports**
 - Asset Reports

Quality Management System

- **Goal and Procedure**
 - Quality Goal
 - Quality Procedure
 - Tree Of Procedures
- **2. Review and Action**
 - Quality Review
 - Quality Action
- **3. Meeting**
 - Quality Meeting
- **4. Feedback**
 - Quality Feedback Template
 - Quality Feedback

Support

- **Issues**
 - Issue
 - Issue Type and Priority
 - Service Level
 - Service Level Agreement

- **Maintenance**
 - Serial Number
 - Warranty Claim
 - Maintenance Visit
 - Maintenance Schedule
- **Settings**
 - Support Settings
- **Reports**
 - Support Reports

Terms and conditions:

- Initial 6 month advance payment is required to execute the work.
- Post 6 months payment required upfront
- Standard ERP will be live within 10 days. Full Implantation will be within 45 working days
- Deployment of production server will be done once all bugs fixed from our end.
- Custom development task apart from the above mentioned point would cost extra.