

User Manual

Project/Procurement/Sales Module

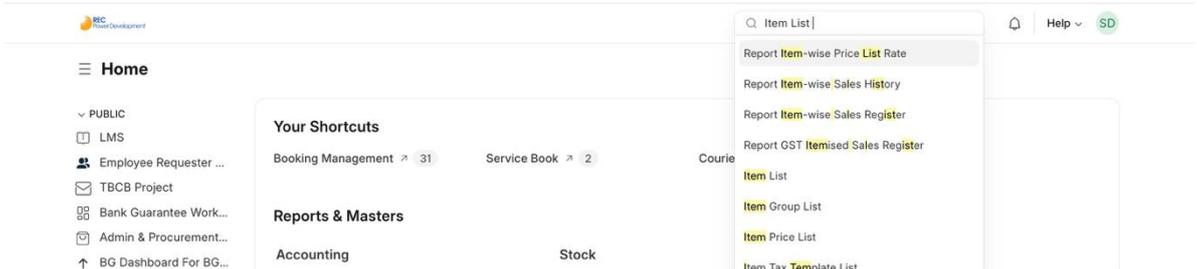
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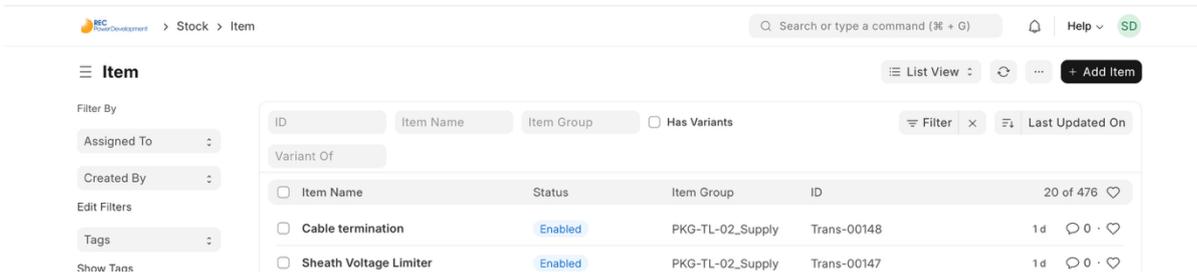
1. ITEM MASTER CREATION:

User Needs to create Item Master to use it in the transactions. To Create the Item Master you need to follow the below steps:

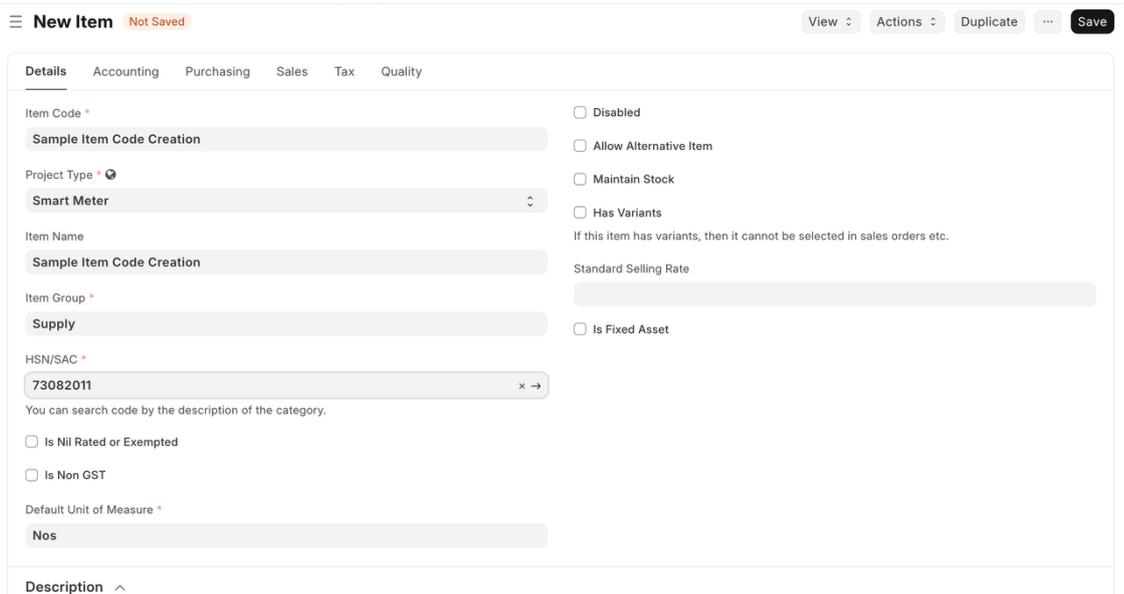
1.1 Search Item List in Awesome Bar



1.2 Click on +Add Item.



1.3 Fill the required fields, where you need to untick Maintain stock as our items are non-stock items in each project.



2.3 Fill Item Group Name, No need to fill other details for Project Module and save it.

3.ITEM PRICE MASTER CREATION

In Item Price master, we define the applicable item rate for particular supplier, If this is created, Item prices will be fetched automatically for that supplier.

Ex- For Item Code **Pipe**, for supplier **ABPS** if item rate is set 50 INR, then it will be auto fetched on the creation of contract for same supplier and same item code.

3.1 Search Item Price in Awesome Bar:

3.2 click on +Add Item Price:

3.3 Fill the details and save, if you haven't selected supplier then this rate is applicable for all the suppliers. Please select the supplier for supplier specific

rate

Item Code *	Calculator	Item Name	Calculator
UOM *	Nos	Item Description	Calculator
Packing Unit	0	Quantity that must be bought or sold per UOM	
Price List			
Price List *	Standard Buying	<input checked="" type="checkbox"/> Buying	<input type="checkbox"/> Selling
Supplier			
Batch No			
Currency	INR	Rate *	100.00
Valid From	24-05-2025	Valid Upto	31-12-2027
Lead Time in days	0		

4.SUPPLIER MASTER CREATION

Supplier master creation is very important as Purchase Orders will be against the suppliers.

4.1 Search Supplier in Awesome Bar.



4.2 Fill the GSTIN and other details like address.

New Supplier

✕

GSTIN / UIN

Autofill party information by entering their GSTIN

Supplier Name *

Supplier Type *

Company
⌵

GST Category *

Unregistered
⌵

Primary Contact Details

Email ID	Mobile Number
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Primary Address Details

When you enter a GSTIN, the permanent address linked to it is autofilled.
Change the Postal Code to autofill other addresses.

<input type="checkbox"/> Preferred Billing Address	<input type="checkbox"/> Preferred Shipping Address
--	---

Postal Code	City/Town
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Address Line 1	State/Province

Edit Full Form

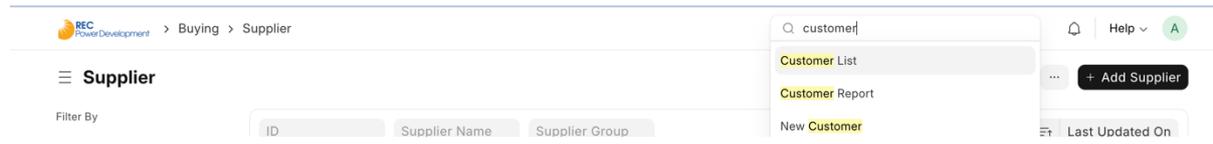
Save

And save it.

5. CUSTOMER MASTER CREATION

Customer master creation is very important as Sales Orders will be against the customers.

5.1 Search Customer in Awesome Bar.



5.2 Fill the required details and save it.

New Customer ✕

GSTIN / UIN

Autofill party information by entering their GSTIN

Customer Name *

Customer Type *

Company ⌵

GST Category *

Unregistered ⌵

Primary Contact Details

Email ID	Mobile Number
<input type="text"/>	<input type="text"/>

Primary Address Details

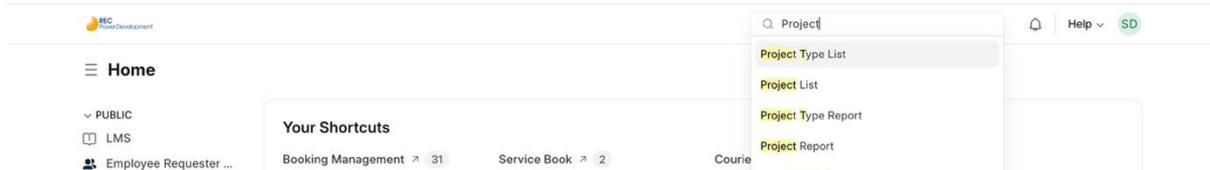
When you enter a GSTIN, the permanent address linked to it is autofilled.
Change the Postal Code to autofill other addresses.

<input type="checkbox"/> Preferred Billing Address	<input type="checkbox"/> Preferred Shipping Address
Postal Code	City/Town
<input type="text"/>	<input type="text"/>
Address Line 1	State/Province
<input type="text"/>	<input type="text"/>

6.PROJECT TYPE CREATION

Project type creation is an essential part of Project Module as many of the features run on selection of project type and it differentiates the project based on their types, classification and department.

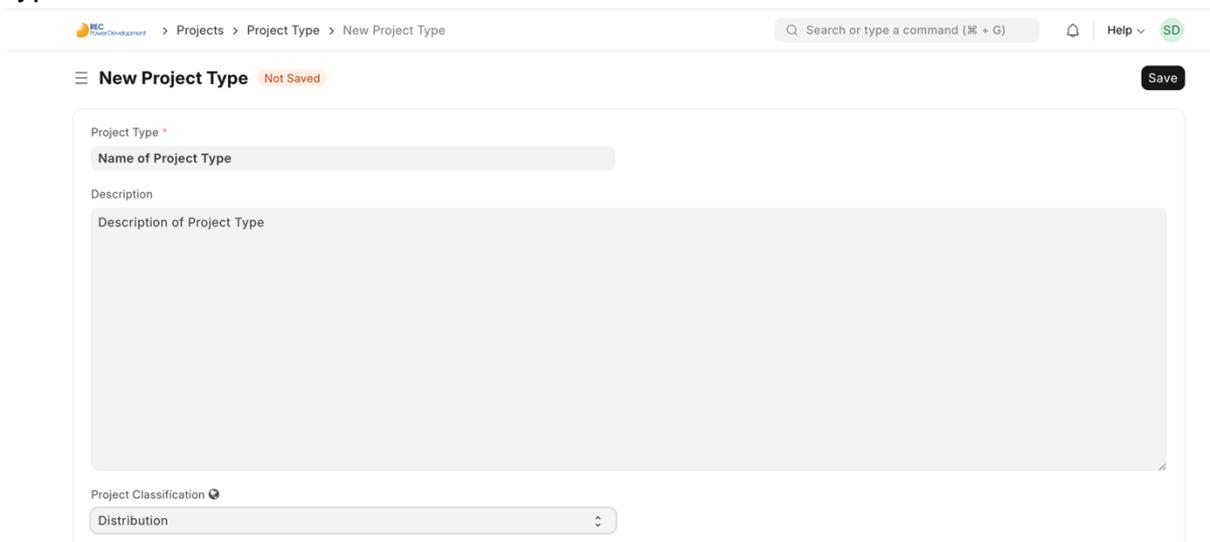
6.1 Search Project Type in Awesome Bar



6.2 Click on +Add Project Type



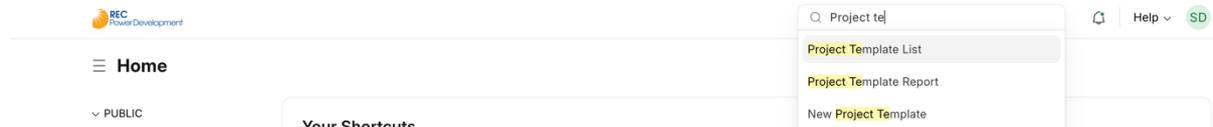
6.3 Fill Necessary details, Select Project classification according to your project type and save it.



7.PROJECT TEMPLATE CREATION:

Project Template is used as a predefined template of tasks to create the projects.

7.1 Search Project Template in the Awesome Bar



7.2 Create a new Project Template by clicking +Add Project Template, Fill the details and save it for further use.

The screenshot shows a form for creating a new project template. It includes a 'Name' field, a 'Project Type' dropdown, and a 'Tasks' table. The table has columns for 'No.', 'Task', and 'Subject'. One row is visible with '1' in the 'No.' column. An 'Add Row' button is located at the bottom of the table.

No.	Task *	Subject
1		

7.PROJECT CREATION:

After Creating the Project Type, Project Template we can create the project as well.

7.1 Search Project in Awesome Bar



7.2 Add New Project and fill the details.

Power Development / Projects / New Project

New Project Not Saved Save

Series *	From Template
PROJ-####	
Project Name *	Expected Start Date
Project Code	Expected End Date
Status	Priority
Open	Medium
Project Type *	Department *
Is Active	Technological Options Database
Yes	
% Complete Method	Project Proposal
Task Progress	
	Location *

You can put the data in different fields

Project Name: Name of the Project

Project Code: With Reference to Finance

Project Type: Fill from the list in dropdown.

Expected Start Date: Start Date of Project

Expected End Date: End Date of Project

From Template: Link the Template for Task creation

Department: Link respective department

Project Proposal: If any Project Proposal (For Smart Meter)

Location: Select the State of Project

Project Extension Date Table

No.	Status *	Start Date *	End Date *	Attachment	Original value
No Data					

Add Row

Customer Details

Users

Users

Project will be accessible on the website to these users

No.	User *	Full Name	View attachments	Efforts percentage	Project Status
No Data					

Fill the details in table, if required.

7.CONTRACT MANAGEMENT:

Contract Management is used to define the scope of work between the 2 parties like- Supplier and organization.

7.1 Search Contract in Awesome Bar.



7.2 Create New Contract.

REC Power Development > CRM > Contract > New Contract

Search or type a command (⌘ + G) | Help | SD

New Contract Not Saved Save

Party Type *
Supplier

Party Name *
ANVIL Cables Private Limited

Project *
PROJ-0081

Company
NEW INDICTRANS TECHNOLOGIES PRIVATE LIMITED

Project Type
Transmission

Price List
Standard Buying

Project Classification
Transmission

Contract Number *
Contract123

Performance Bank Guarantee

Contract Period

Frequency Type
Manual

End Date *
31-05-2025

Start Date *
30-05-2025

Penalty Terms

If 'Is Penalty applicable' ticked, Values of 'Penalty After Days' and 'Penalty Percentage' will be auto fetched in below table.

Contract Phases and Details

<input type="checkbox"/>	No.	Item Code	Quantity	Unit Rate	Item Group	HSN Code	
<input type="checkbox"/>	1	Trans-00144	10	₹ 34.00	PKG-TL-02_Supply	85447090	
<input type="checkbox"/>	2	Trans-00145	10	₹ 36.00	PKG-TL-02_Supply	85447090	
<input type="checkbox"/>	3	Trans-00006	10	₹ 37.00	PKG-TL-01_Service	998344	
<input type="checkbox"/>	4	Trans-00005	10.000	39.00	PKG-TL-01_Service	998344	

Add Row Download Upload

Total Contract Amount
₹ 1,460.00

NOW SAVE THE CONTRACT

7.2 PURCHASE ORDER CREATION FROM CONTRACT

REC Power Development > CRM > Contract > Contract123

Search or type a command (# + G) | Help | SD

Contract123 Approved

Create Purchase Order < > & Cancel

Assigned To +
Attachments +
Tags +
Share +

0 - 0 FOLLOW
You last edited this - just now
You created this - just now

Connections ^

Purchase Order + Purchase Receipt +

Party Type *	Party Name *
Supplier	ANVIL Cables Private Limited
Project *	Company
PROJ-0081	NEW INDICTRANS TECHNOLOGIES PRIVATE LIMITED
Project Type	Price List
Transmission	Standard Buying
Project Classification	

Click on Create Purchase Order Button, you will get 2 options. You need to click on Item Group Wise Purchase Order.7.3

Create Purchase Order ▾ < >

Single Purchase Order

Item Group Wise Purchase Order

7.3 On Click you will get the message like

● Message ×

Purchase Order Created for Item Group 'PKG-TL-02_Supply': PUR-ORD-2025-00123

Purchase Order Created for Item Group 'PKG-TL-01_Service': PUR-ORD-2025-00124

Here 2 Purchase Orders are created with Item Group 'PKG-TL-02_Supply' and 'PKG-TL-01_Service'.

You can see the connections.

☰ **Contract123** Approved

-  Assigned To +
-  Attachments +
-  Tags +

Connections ^

2 Purchase Order 2 +

Purchase Receipt +

8. PURCHASE ORDER :

FROM THE CONTRACT, WE HAVE CREATED THE PURCHASE ORDER SUCCESSFULLY, NOW WE WILL ROUTE TO THE PURCHASE ORDERS.

ID	Supplier	Supplier Name	Company	Filters 1		Last Updated On	
Status							
<input type="checkbox"/>	Supplier Name	Status	% Billed	% Recei...	Date	Grand T... Paymen... Milestone ID	2 of 2
<input type="checkbox"/>	ANVIL Cables	Draft	<div style="width: 50%;"></div>	<div style="width: 50%;"></div>	30-05-2...	₹ 760.00 PUR-OR...	13 m 0
<input type="checkbox"/>	ANVIL Cables	Draft	<div style="width: 50%;"></div>	<div style="width: 50%;"></div>	30-05-2...	₹ 700.00 PUR-OR...	13 m 0

8.1 OPEN THE PURCHASE ORDER, FILL THE DETAILS, SAVE & SUBMIT.

ANVIL Cables Private Limited Not Saved

Get Items From Tools < > Save

- Assigned To +
- Attachments +
- Tags +
- Share +

0 · 0 FOLLOW

You last edited this - 15 minutes ago

You created this - 15 minutes ago

Details		Address & Contact		Terms		Connections	
Supplier *	ANVIL Cables Private Limited			Date *	30-05-2025		
Company *	NEW INDICTRANS TECHNOLOGIES PRIVAT			Required By	31-05-2025		
				BG Number (Only Active BG)			
				<input type="checkbox"/> Apply Tax Withholding Amount			
				<input type="checkbox"/> Is Reverse Charge			
				<input type="checkbox"/> Is Subcontracted			
Bank Guarantee Table							
<input type="checkbox"/>	No.	BG Number	Expiry Date				
No Data							
Add Row							
Accounting Dimensions							
Project Type				State			
Transmission							
Cost Center				Project			
				PROJ-0081			

ADD ITEMS AND TAXES ACCORDINGLY

Details		Address & Contact		Terms				
Items								
<input type="checkbox"/>	No.	Item Code *	Required By *	Quantity *	UOM *	Rate (INR)	Amount (INR)	
<input type="checkbox"/>	1	SPWC(10-60A)	Required By	5,000.000	Nos	30.16	1,50,800.00	
Add Row Add Multiple						Download Upload		
Total Quantity				Total (INR)				
5,000				₹ 1,50,800.00				
Taxes and Charges								
Tax Category			Shipping Rule			Incoterm		
Purchase Taxes and Charges Template								
Input GST RCM Out-state								
Purchase Taxes and Charges								
<input type="checkbox"/>	No.	Type *	Account Head *	Tax Rate	Amount	Total		
<input type="checkbox"/>	1	On Net Total	Input Tax IGST - RPDCL	18	₹ 27,144.00	₹ 1,77,944.00		
Add Row								
Taxes and Charges Added (INR)						₹ 27,144.00		

ANVIL Cables Private Limited Approved

Update Items | Status | **Create** | < | > | ... | **Actions**

- Assigned To +
 - Attachments +
 - Tags +
 - Share +
- 0 - 0 FOLLOW

You last edited this - just now

You created this - 16 minutes ago

Details	Address & Contact	Terms	Connections
Supplier *	ANVIL Cables Private Limited	Date *	30-05-2025
Order Confirmation No		Required By	31-05-2025
Company *		NEW INDICTRANS TECHNOLOGIES PRIVATE LIMITED	
		<input type="checkbox"/> Apply Tax Withholding Amount <input type="checkbox"/> Is Reverse Charge <input type="checkbox"/> Is Subcontracted	
Accounting Dimensions			
Project Type	Transmission	Project	PROJ-0081
Contract	Contract123	Project Type	Transmission
<input type="checkbox"/> CEO		Project Classification	Transmission
Item Group	PKG-TL-01_Service		
Currency and Price List ▾			
Items			

9. PURCHASE RECEIPT:

9.1 FROM PURCHASE ORDER, CLICK ON CREATE BUTTON & CREATE PURCHASE RECEIPT

Details	Address & Contact	Terms	More Info	Connections	
Series *	PR--YY--	Date *	30-05-2025	Company *	
Supplier *	ANVIL Cables Private Limited	Posting Time *	10:44	NEW INDICTRANS TECHNOLOGIES PRIVATE LIMITED	
Supplier Delivery Note		<input type="checkbox"/> Edit Posting Date and Time		<input type="checkbox"/> Apply Putaway Rule <input type="checkbox"/> Is Return JVR Document Attach	
Accounting Dimensions ▾					
Currency and Price List ▾					
Items					
Scan Barcode	Accepted Warehouse	Rejected Warehouse			
		<input type="checkbox"/> Is Subcontracted			
Items					
No.	Item Code *	Accepted Quantity	Rate (INR)	Amount (INR)	Rejected Quantity
1	Trans-00006: b) Check Sur...	10	₹ 37.00	₹ 370.00	0
2	Trans-00005: a)Detailed su...	10	₹ 39.00	₹ 390.00	0
Add Row		Add Multiple		Download Upload	

9.2 If Quality Inspection is applicable on Item Master We need to create Quality Inspection First.

IL Cables Private Limited Draft Get Items From Create Preview < > ... Actions

Quality Inspection(s)

Details Address & Contact Terms More Info Connections

Supplier * Date * Company *

ANVII Cables Private Limited 30-05-2025 NEW INDICTRANS TECHNOLOGIES PRIVATE

9.3 Click on Quality Inspection Button and click on Create

Select Items for Quality Inspection

Items

<input type="checkbox"/>	Item Code	Item Name	Accepted Quantity	Sample Size *
<input type="checkbox"/>	Trans-00006	b) Check Survey	10	1
<input type="checkbox"/>	Trans-00005	a)Detailed survey including profiling,	10.000	1.000

Create

0 FOLLOW Attach

QUALITY INSPECTION FOR THESE ITEMS WILL BE CREATED IN DRAFT. YOU NEED TO SUBMIT IT TO PROCEED FURTHER. SUBMIT THE BELOW FIRST TO PROCEED FURTHER.

Quality Inspection List View + Add Quality Inspection

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Tags

Save Filter

Filter Name

ID Inspection Type PR-25-00053 Item Code Filters 1 Last Updated On

ID	Status	Report Date	Inspection Type	Reference Name	2 of 2
<input type="checkbox"/> MAT-QA-2025-00044	Draft	30-05-2025	Incoming	PR-25-00053	now 0
<input type="checkbox"/> MAT-QA-2025-00045	Draft	30-05-2025	Incoming	PR-25-00053	now 0

ONCE SUBMITTED. GO TO PURCHASE RECEIPT AGAIN,

ID MAT-QA-2025-00045 Inspection Type PR-25-00053 Item Code Filters 1 Last Updated On

ID	Status	Report Date	Inspection Type	Reference Name	2 of 2
<input type="checkbox"/> MAT-QA-2025-00044	Submitted	30-05-2025	Incoming	PR-25-00053	now 0
<input type="checkbox"/> MAT-QA-2025-00045	Submitted	30-05-2025	Incoming	PR-25-00053	now 0

APPROVE THE PURCHASE RECEIPT TO PROCEED FURTHER

REC Power Development > Stock > Purchase Receipt > PR-25-00053

Q Search or type a command (% + G) Help SD

ANVIL Cables Private Limited Pending at Project Manager

Get Items From Create Preview < > Actions

Assigned To + Attachments + Tags + Share +

0 · 0 FOLLOW

You last edited this · just now

You created this · 4 minutes ago

Details Address & Contact Terms More Info Connections

Supplier * ANVIL Cables Private Limited Date * 30-05-2025 Company * NEW INDICTRANS TECHNOLOGIES PRIVAT

Supplier Delivery Note Posting Time * 10:52

Edit Posting Date and Time

Apply Putaway Rule

Is Return

JVR Document Attach

Accounting Dimensions

Currency and Price List

Items

Scan Barcode Accepted Warehouse Rejected Warehouse

AFTER APPROVAL,

REC Power Development > Stock > Purchase Receipt > PR-25-00053

Q Search or type a command (% + G) Help SD

ANVIL Cables Private Limited Approved

Create View Status < > Actions

Assigned To + Attachments + Tags + Share +

0 · 0 FOLLOW

You last edited this · just now

Details Address & Contact More Info Connections

Supplier * ANVIL Cables Private Limited Date * 30-05-2025 Company * NEW INDICTRANS TECHNOLOGIES PRIVATE LIMITED

Posting Time * 10:53

Apply Putaway Rule

Is Return

Accounting Dimensions

Currency and Price List

Note: Quality Inspection is required in Transmission Project only. For other Projects, it is not applicable.

10. PURCHASE INVOICE:

CLICK ON CREATE BUTTON ON PURCHASE RECEIPT TO CREATE PURCHASE INVOICE.

Accounting > Purchase Invoice > New Purchase Invoice

Search or type a command (⌘ + G) Help SD

New Purchase Invoice Not Saved Create Get Items From Save

Details Payments Address & Contact Terms More Info

Add Row

Supplier Invoice ^

Supplier Invoice No * Supplier Invoice Date

Accounting Dimensions v

Currency and Price List v

Items

Scan Barcode Update Stock Is Subcontracted

<input type="checkbox"/>	No.	Item	Accepted Qty *	Rate (INR) *	Amount (INR) *	
<input type="checkbox"/>	1	Trans-00006: b) Check Survey	10	₹ 37.00	₹ 370.00	
<input type="checkbox"/>	2	Trans-00005: a)Detailed survey including p...	10	₹ 39.00	₹ 390.00	

Add Row Add Multiple Download Upload

Total Quantity Total (INR)

WE NEED TO PUT SUPPLIER INVOICE NO AND SUPPLIER INVOICE DATE & SAVE IT, REST FUNCTION WILL BE DONE BY FINANCE.

11. MATERIAL INSPECTION (DISTRIBUTION PROJECT)

MASTERS:

CREATE MATERIAL NAME AS IT IS A MASTER DATA REQUIRED TO DO THE TRANSACTION

11.1 CREATE MATERIAL NAME

BG Dashboard For BG Approver > Material Name > New Material Name

Search or type a command (⌘ + G) Help SD

New Material Name Not Saved Save

Material Name *

Material Descriptions

FILL THE NAME OF MATERIAL AND DESCRIPTION ON IT AND SAVE

Sample Material < > ⌵ ⋮ Save

Assigned To +
 Attachments +
 Tags +
 Share +

Material Descriptions

Sample Material Description.

0 · 0 FOLLOW **Comments**

11.2 CREATE MATERIAL INSPECTION

REC Power Development > BG Dashboard For BG Approver > Material Inspection Search or type a command (⌘ + G) Help v SD

Material Inspection List View ⌵ ⌲ ⋮ + Add Material Inspection

Filter By

Assigned To ⌵

Created By ⌵

Edit Filters

Tags ⌵

Show Tags

ID

Filter x Last Updated On

CLICK ON +ADD MATERIAL REQUEST

New Material Inspection Not Saved Save

<p>Project *</p> <p>PROJ-0035</p> <p>Project Type *</p> <p>Smart Meter</p> <p>Project Classification *</p> <p>Smart Meter</p> <p>Project Name</p> <p>Smart Metering Project</p> <p>Material Inspection type *</p> <p>⌵</p> <p>Attachment</p> <p>Attach</p>	<p>Posting Date *</p> <p>02-06-2025 15:00</p> <p>Asia/Kolkata</p> <p>Employee ID *</p> <p>61571</p> <p>Employee Name</p> <p>Neha</p> <p><input type="checkbox"/> Edit Posting Time</p> <p>Census Code No</p> <p>1234</p> <p>Name Of Village</p> <p>Village name</p> <p>Name Of Block</p> <p>Block name</p> <p>Name of District</p> <p>District Name</p> <p>Scheme Name</p> <p>Scheme Name</p>
---	---

FILL THE DETAILS, SELECT MATERIAL INSPECTION TYPE: **QUALITY, QUANTITY OR BOTH**

1. QUANTITY TABLE

Editing Row #1

Material Name *

UOM *

Length *

Quantity Offered *

Quantity Accepted *

Quantity Rejected

Remarks

Fill the Quantity Table as filled in above screenshot, Quantity Rejected will be calculated automatically based on Quantity offered and Quantity Accepted.

2. Quality Table

Fill the required details as shown in below screenshot

Editing Row #1

Material Name *

During Inspection Attachment

Post Rectification Attachment

Result *

Remarks

Save the document and submit it. In case if there is approval matrix, follow the same.

MI-25-00461 Approved

Assigned To +
Attachments +
Tags +
Share +

0 0 FOLLOW
You last edited this - just now
You created this - just now

Project *
PROJ-0035: Smart Metering Project

Project Type *
Smart Meter

Project Classification *
Smart Meter

Project Name
Smart Metering Project

Material Inspection type *
Both

Posting Date *
02-06-2025 15:00

Asia/Kolkata

Employee ID *
61571

Employee Name
Neha

Edit Posting Time

Census Code No
1234

Name Of Village
Village name

Name Of Block
Block name

Name of District
District Name

Scheme Name
Scheme Name

Quantity Table

16.Sales Order:

16.1 Search Sales Order in awesome bar

REC Power Development > BG Dashboard For BG Approver > Material Inspection > MI-25-00461

MI-25-00461 Approved

Q sales order

- Sales Order List
- Sales Order Report

Help v SD

16.2 Create New Sales Order

New Sales Order Not Saved Get Items From Save

Details Terms More Info

Series * Date * Customer's Purchase Order

Customer * Delivery Date Company *

Order Type *

Accounting Dimensions

Cost Center State

Project

Currency and Price List

Student Info

Items

Scan Barcode Set Source Warehouse

Fill the Required details.

New Sales Order Not Saved Get Items From Save

Details Address & Contact Terms More Info

Project Name

Project Type

Project Classification

Currency and Price List

Student Info

Items

Scan Barcode Set Source Warehouse

<input type="checkbox"/>	No.	Item Code *	Description	Quantity *	UOM *	Rate (INR)	Amount (INR)	<input type="text"/>
<input type="checkbox"/>	1	Trans-00145	MANDATORY	1.000	Nos	19.00	19.00	<input type="text"/>

Save and Submit the Sales Order:

REC Power Development > Selling > Sales Order > SAL-ORD-2025-00021

Search or type a command (⌘ + G) Help SD

Transmission Project To Deliver and Bill

Update Items Status: Create < > ... Cancel

Assigned To + Attachments + Tags + Share +

0 · 0 FOLLOW

You last edited this · just now
You created this · just now

Details Address & Contact Terms More Info Connections

Customer * 202309-Energy Audit & Analytical Support to UPPCL Date * 02-06-2025 Customer's Purchase Order

Order Type * Sales Delivery Date 30-06-2025 Company * NEW INDICTRANS TECHNOLOGIES PRIVATE LIMITED

Accounting Dimensions

Cost Center Main - NITPL State Maharashtra

Project PROJ-0081

Project Name

17. Delivery Note:

Click on create button and select Delivery note on sales order document.

REC Power Development > Selling > Sales Order > SAL-ORD-2025-00021

Search or type a command (⌘ + G) Help SD

Transmission Project To Deliver and Bill

Update Items Status: Create < > ... Cancel

Assigned To + Attachments + Tags + Share +

Details Address & Contact Terms More Info Connections

Customer * 202309-Energy Audit & Analytical Support to UPPCL Date * 02-06-2025

Order Type * Sales Delivery Date 30-06-2025

Pick List
Delivery Note
Work Order
Sales Invoice
Material Request
Request for Raw Materials
Purchase Order
Project

Most of the fields will be auto populate from Sales Order.

REC Power Development > Stock > Delivery Note > New Delivery Note

Search or type a command (⌘ + G) Help SD

New Delivery Note Not Saved

Get Items From: ... Save

Details Address & Contact Terms More Info

DN-.YY.- 02-06-2025 NEW INDICTRANS TECHNOLOGIES PRIVATE LIMITED

Customer * 202309-Energy Audit & Analytical Support to UPPCL Posting Time * 15:14 Is Return

Edit Posting Date and Time

Accounting Dimensions

Project Type Project State
Project PROJ-0081 Maharashtra

Cost Center Main - NITPL Project Name Project Type
Transmission Project Transmission

Project Classification
Transmission

Currency and Price List

Items

Scan Barcode Set Source Warehouse

Save and submit the document.

Transmission Project To Bill

Create View Status < > ... Cancel

- Assigned To +
- Attachments +
- Tags +
- Share +

0 - 0 FOLLOW

You last edited this - just now

You created this - just now

Details Address & Contact More Info Connections

Customer *	Date *	Company *
202309-Energy Audit & Analytical Support to UPPCL	02-06-2025	NEW INDICTRANS TECHNOLOGIES PRIVATE LIMITED
	Posting Time *	<input type="checkbox"/> Is Return
	15:15	

Accounting Dimensions

Cost Center	Project	State
Main - NITPL	PROJ-0081	Maharastra
	Project Name	Project Type
	Transmission Project	Transmission
	Project Classification	Transmission

Currency and Price List

Delivery Note Item

No.	Item Code *	Quantity *	UOM *	Rate (INR)	Amount (INR)
1	Trans-00145: Cable j	1	Nos	₹ 19.00	₹ 19.00

Download

18. Sales Invoice:

Sales invoice can be created from Create button in Delivery Note:

The screenshot shows the same Delivery Note interface as above. The 'Create' button is highlighted, and a dropdown menu is open, listing options: Shipment, Installation Note, Sales Return, Delivery Trip, and Sales Invoice. The 'Sales Invoice' option is selected and highlighted in grey.

Data will be auto fetched.

New Sales Invoice Not Saved Fetch Timesheet Get Items From Save

Details Payments Address & Contact Terms More Info

Series * Date * Include Payment (POS)

Customer Posting Time Is Return (Credit Note)

Loan Edit Posting Date and Time Is Rate Adjustment Entry (Debit Note)
Issue a debit note with 0 qty against an existing Sales Invoice

Company * Payment Due Date *

Accounting Dimensions

Project Type State

Cost Center Project

Project Name

Project Type

Project Classification

Save and submit the document.

Transmission Project Unpaid View Create < > Cancel

Assigned To + **Attachments** + **Tags** + **Share** +

Details Payments Address & Contact Terms More Info Connections

Customer Date * Include Payment (POS)

e-Waybill Status Posting Time Is Return (Credit Note)

Company * Payment Due Date * Is Rate Adjustment Entry (Debit Note)
Issue a debit note with 0 qty against an existing Sales Invoice

Accounting Dimensions

Cost Center State

Project

Project Name

Hence, Sales Invoice will be submitted. Status of SI will be unpaid until we get the payment of the details.

19. Purchase Order Analysis Report:

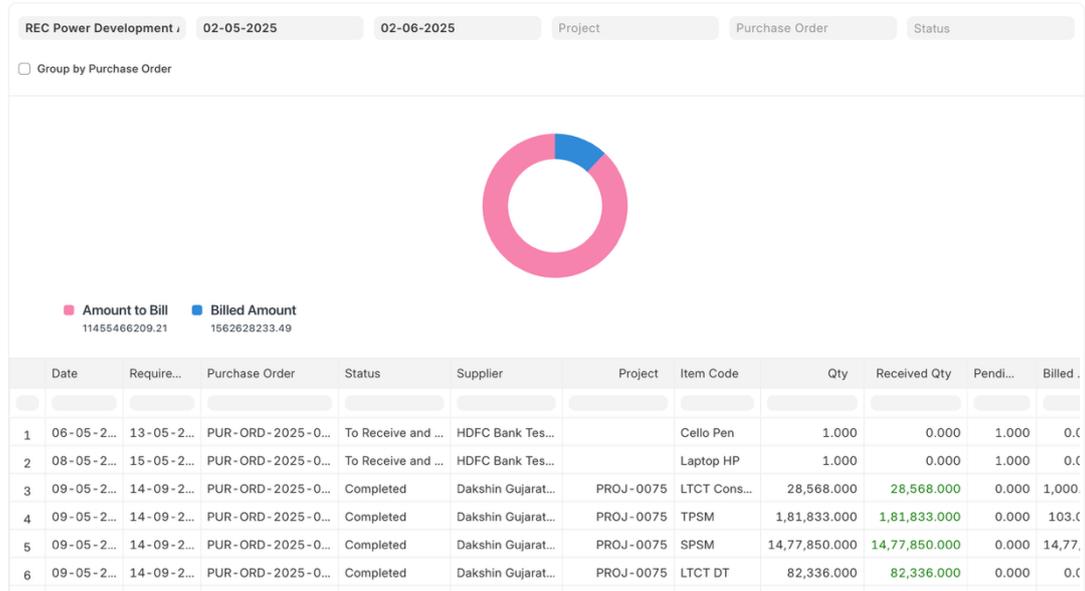
Transmission Project Unpaid Assigned To + Details Payments Address & Contact Terms More Info Connections Help on Search

Report Purchase Order Analysis Search for Purchase Order Analysis Cancel

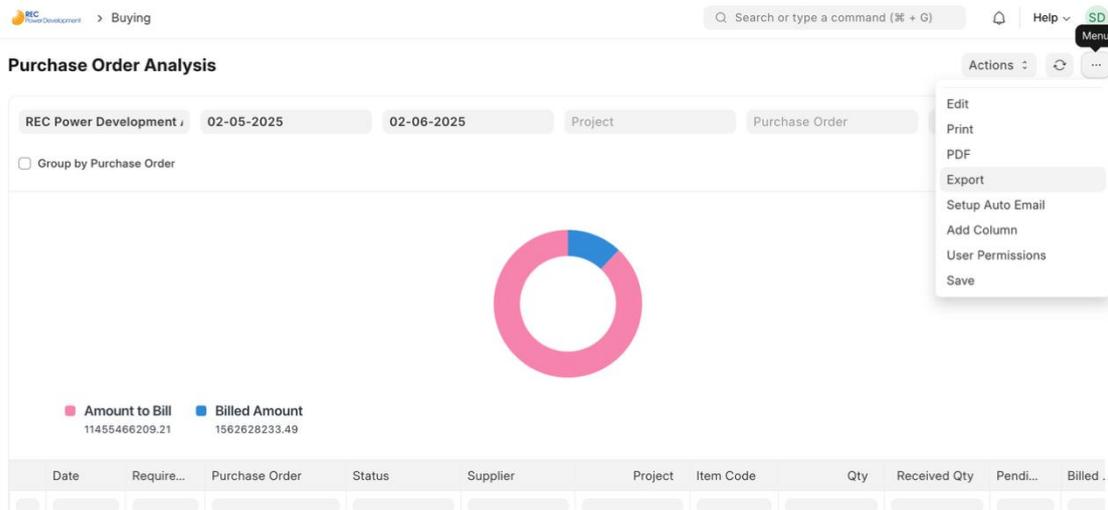
Search Purchase Order Analysis in awesome bar

Purchase Order Analysis

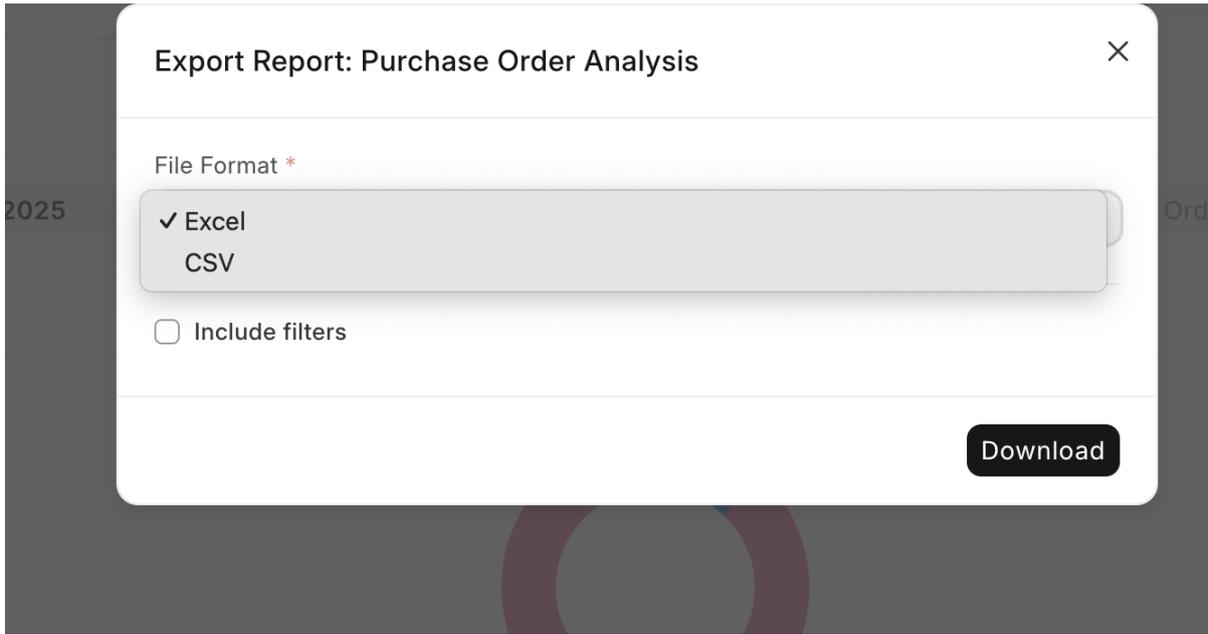
Actions



You will get this interface, where you can apply the filters and populate the required data.

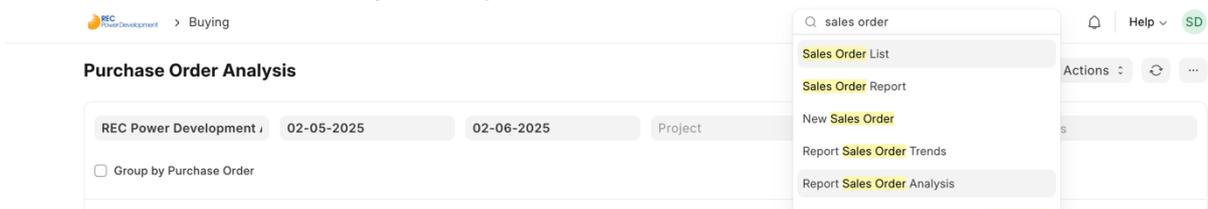


You can Export the data by clicking ... (3dots) and click on export and select the Excel or CSV as required format.



20. Sales Order Analysis Report:

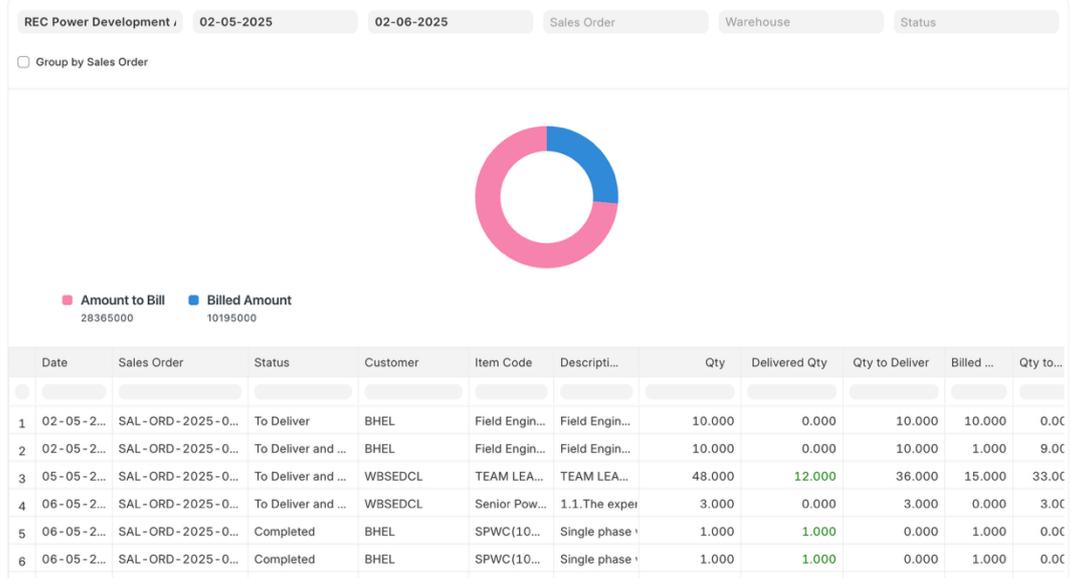
Search Sales Order Analysis Report in Awesome bar



You will get the below interface. This is similar to Purchase Order Analysis.

Sales Order Analysis

Actions : [Refresh] [More]



You can apply the filters and fetch the required data, also you can export the report in excel