Sparsh Communications Ltd

Software Division

SALES MODULE

User Manual

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1.2 Scope

This document describes in detail, the process flow and types of screens used in the Sales module. The screens in this module are divided into Masters, Transactions and Reports.

2. Sales Module

This module consists of Master forms, Transaction forms and Reports. These forms are used to capture information related to Sales module. The module starts with the Login screen. To login to this module, the user should enter required information in the login screen. On successful authentication of the user, the system displays the list of modules present in the Package.

The user should click on the Sales button, for logging into the Sales module.

The Sales module starts with Master Screens. After entering the Master information in the master screens, the user should enter information in the transaction forms.

The user can view the detailed analysis of the transactions occurred in the Sales Module using reports.

Given below is the detailed description of the Master Forms, Transaction Forms and Reports.

General Information

Many of the forms in this module have some common operations. These operations are described below.

New – For entering New Record, click on New Button on Toolbar (New Button) or Main Menu (using Action menu option).

Edit – For modifying already existing record, click on Edit Button on Toolbar (Edit Button) or Main Menu (using Action menu option).

Save – After entering required information in the form, click on Save Button on Toolbar (Save Button) or Main Menu (using Action menu option).

Clear – To clear the contents in the controls, click on Clear Button on Toolbar (Clear Button) or Main Menu (using Action menu option).

Retrieve – To view the minimum information of the entered records, click on Retrieve Button on Toolbar (Retrieve Button) or Main Menu (using Action menu option).

Close – To close the active form, click on Close Button on Toolbar (Close Button) or Main Menu (using Action menu option).

Exit – To exit from the application, click on Exit Button on Toolbar (Exit Button) or Main Menu (using Action menu option).

Note – The fields marked with “ * ” characters in the forms are mandatory for entry.

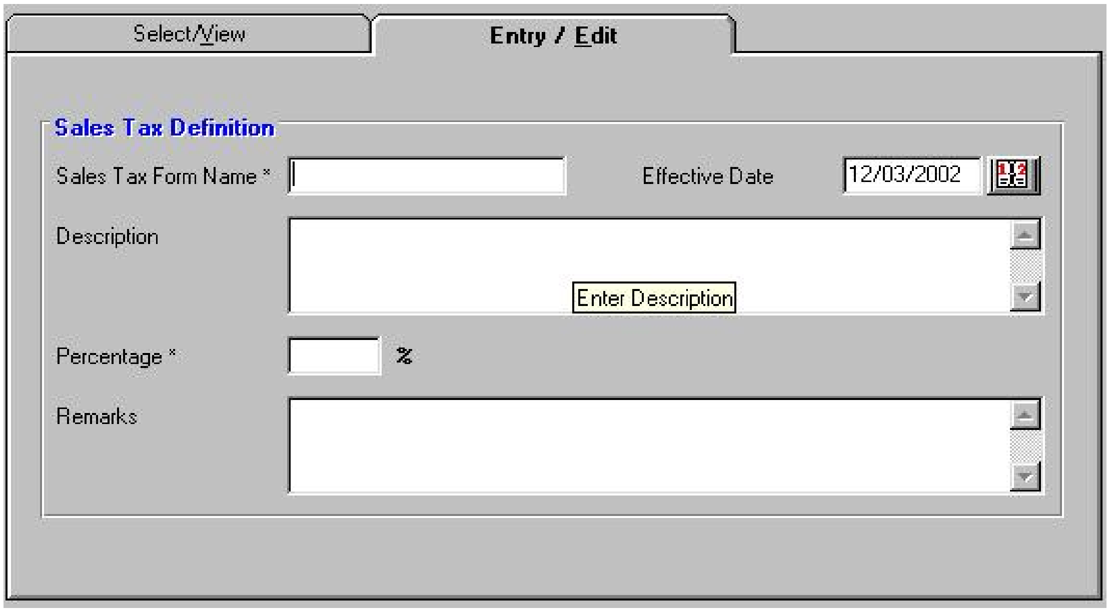
Master Forms Information

Master Forms are as follows:

Tax Master, Bank Master, Customer Master, Product Classification, Tariff Master, Product Attributes and Product Master.

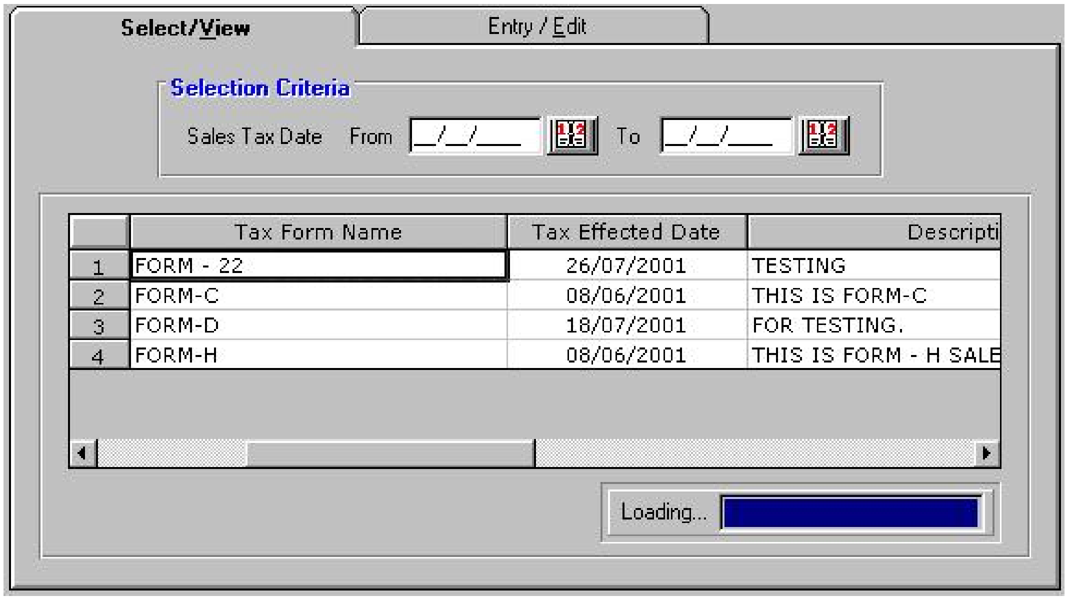
Tax Master:

While Click on the Master options in the Main Menu, select the Tax Master option, the following form is displayed.



In the Entry / Edit mode we can enter the Tax information on the relevant fields and then press Save. Then you get a message box saying, “Data Has Been Saved.”

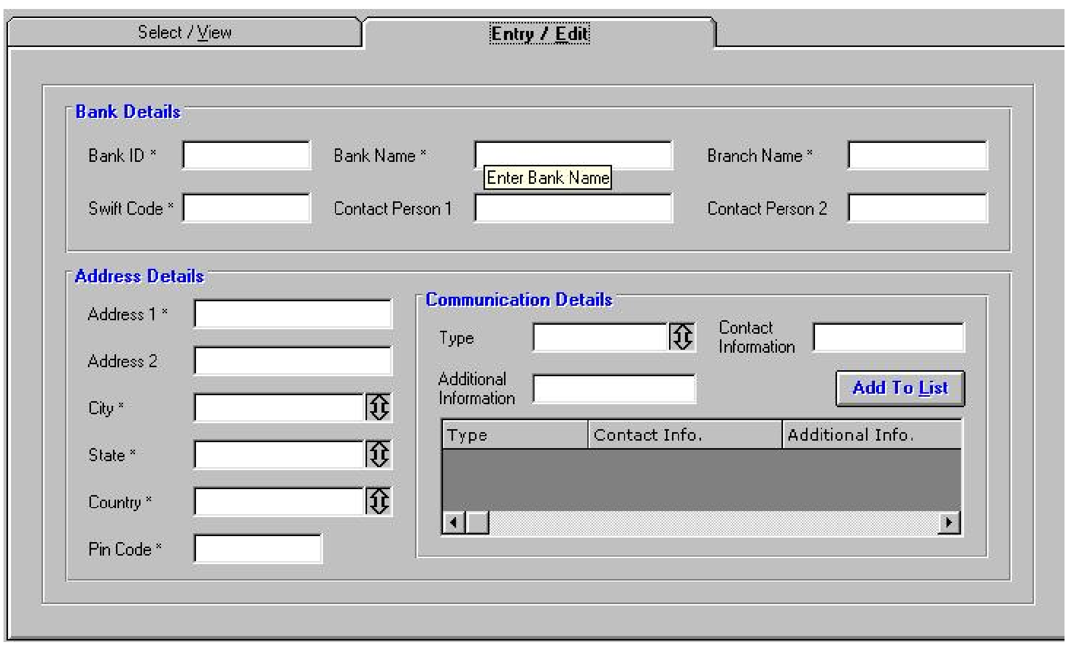
If you want to see the tax details then press ‘Retrieve’ Button.



Double click on the Grid to Edit or Delete the Tax Details.

Bank Master:

Click on the 'Master' option of the Main Menu, select the "Bank Master" in that, to get Bank Master form.

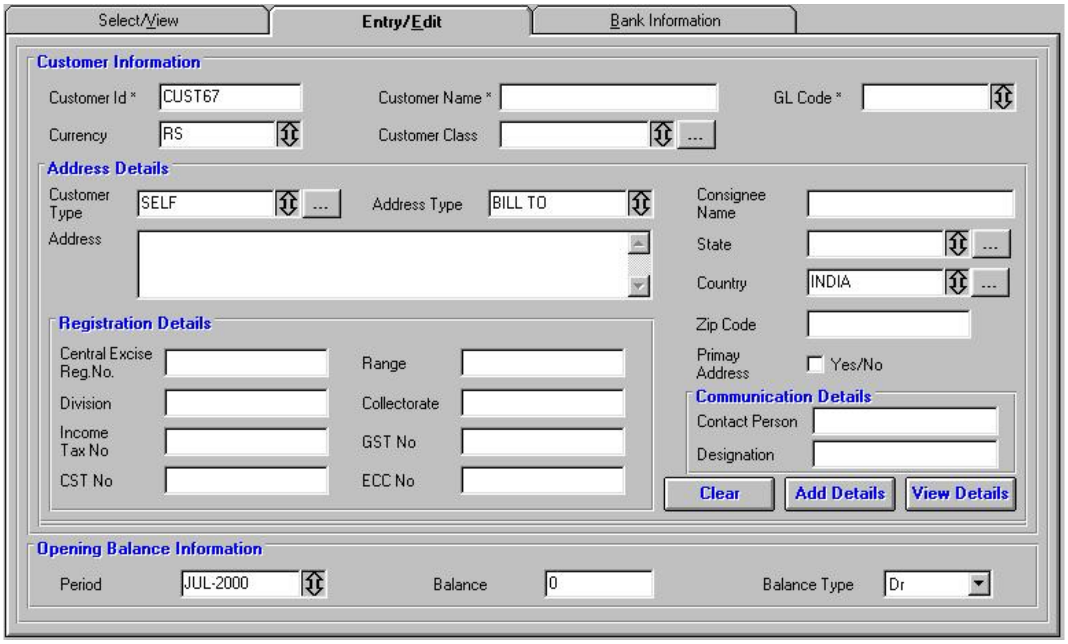


In this form you can enter the Bank Details of the Customer as well as Company.

The data for City, State, Country and Type (of communication details section) comes from General Purpose form of Admin module.

Customer Master:

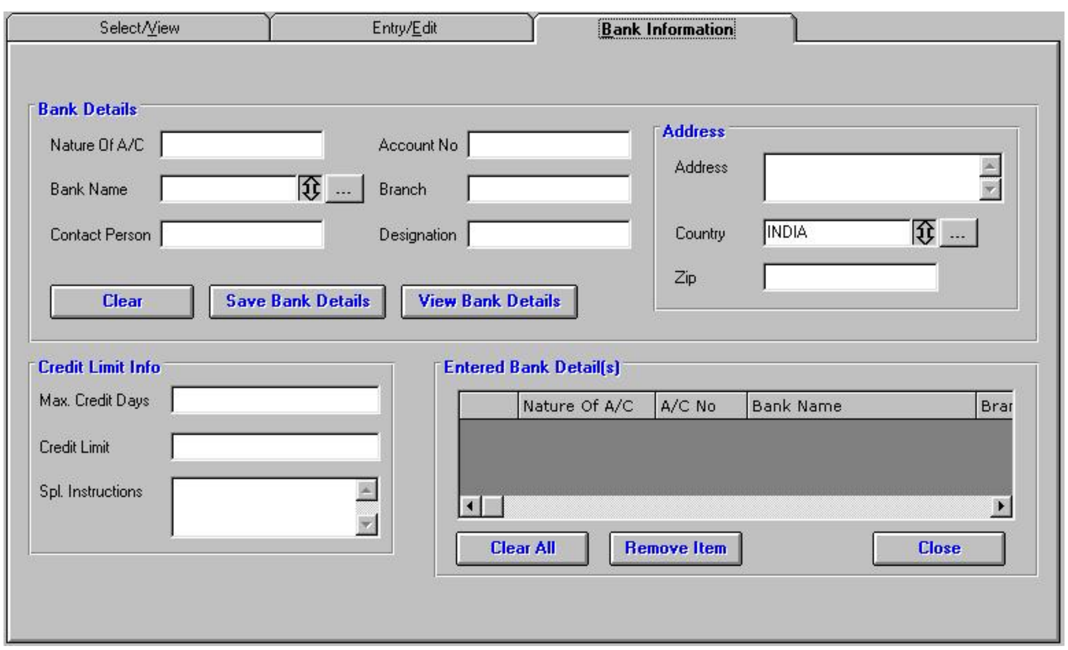
Click on the ‘Master’ option of the Main Menu, select the ‘Customer Master'.



In this form you can create the Customers. This form have one facility is available, i.e. One Customer have multiple address. In this GLCode, Period both are come from the Data for Currency, Customer Class, Customer Type, Address Type, State, and Country comes from the ‘General Purpose’ form of the Admin module.

Note: If you want to enter the multiple addresses of a particular Customer, enter the Address details and then press “Add Details” button. Repeat the same process again if have any other address.

We can enter the Customer Bank Details in the ‘Bank Information’ tab.



In this we can enter multiple Bank Accounts / Addresses of related Customer. Data for 'Country' comes from General Purpose.

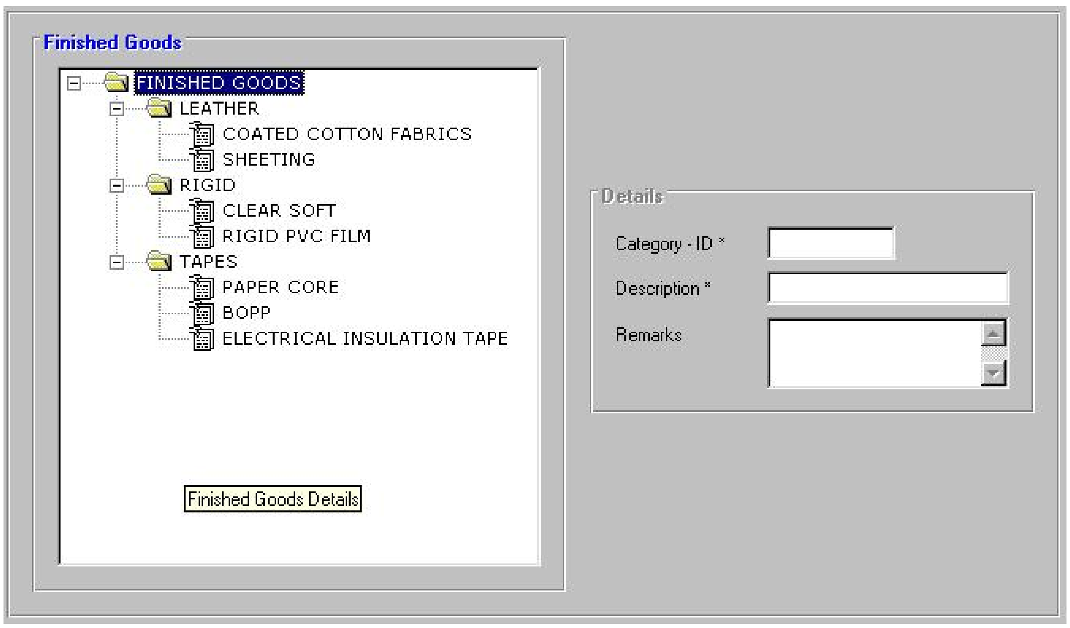
The Next section in the Master forms is Product. This is divided into the following sections:

1. Product Classification
2. Product Attributes
3. Tariff Master
4. Product Master

Before going to the Product Master you must define Classification, Attributes and Tariff.

Product Classification:

While Click on the Master options in the Main Menu, select the Product then again select the Classification in the Sub Menu, the following form is displayed.



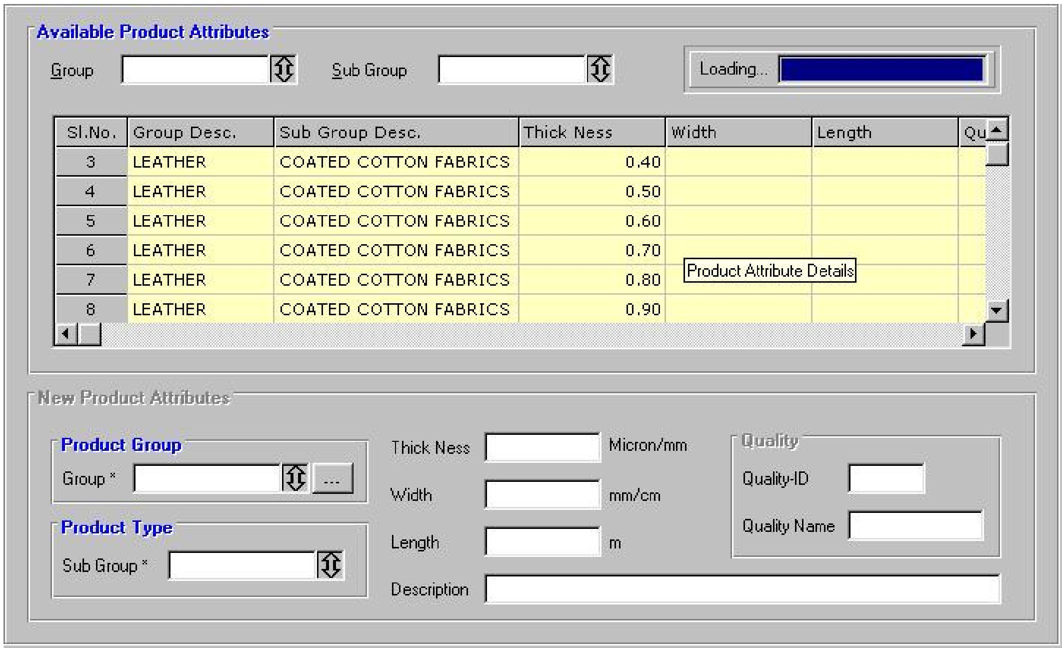
In the Sales Module you can enter only Finished Goods Data only. This Finished Goods is classified into the mainly 3 categories or Divisions i.e. Leather, Rigid, Tapes Divisions. Each division is again classified into 2 or 3 sub Divisions. User can't modify or delete the above Divisions and Sub Divisions, because those divisions are constant for the Finished Goods.

If you can create sub divisions in the existing divisions or create a new division.

Rest of the things is same for the above forms.

Product Attributes:

While Click on the Master options in the Main Menu, select the Attributes in the Product Sub Menu, the following form is displayed.



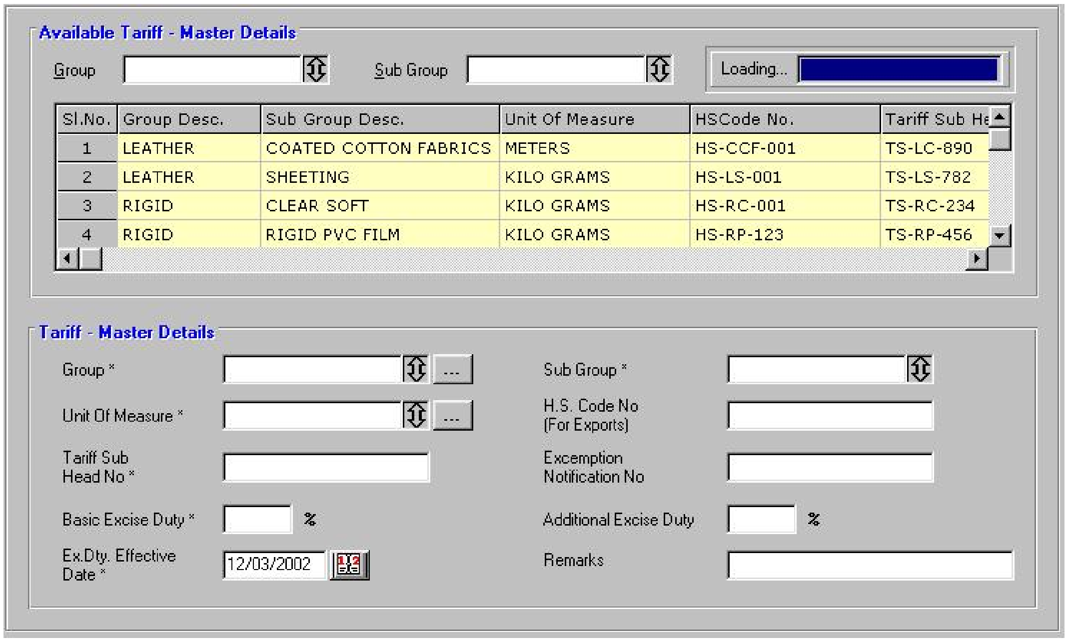
In this form you can declare the available attributes (i.e. Thickness, Width, Length, Quality) of each division and sub division. Once you can declare the attributes in this form you can access these attributes in the Product Master Form. Because in the Product Master Products are generated based on these attributes.

In this Group, Sub Group data come from the Product Classification form.

Rests of the thing are same for the above forms.

Tariff Master:

While Click on the Master options in the Main Menu, select the Tariff Master in the Products Sub Menu, following form is displayed.



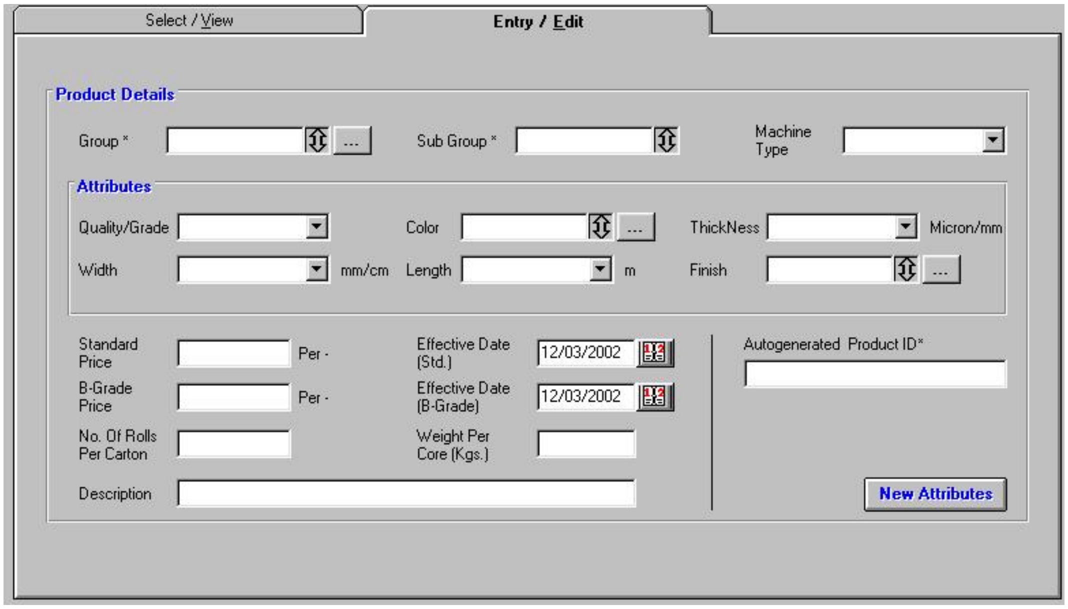
This form is used to enter the Tariff Details (i.e. Duties) of each sub division. Once you can enter the duties in this form it will these in the Transaction forms.

In this Group, Sub Group come from the Product Classification From, Unit of Measurement come from the General purpose.

Rests of things are similar for the above forms.

Product Master:

While Click on the Master options in the Main Menu, select the Product Master in the Product sub Menu, following form is displayed.



This form used to create the Product ID based on the Attributes. Once the Product ID is generated in this form you can access this in all the Transaction forms.

In this Group, Sub Group is come from the Product Classification form. Quality, Thickness, Width and Length from the Product Attributes Form, these attributes are filled based on the selection of the Group and Sub Group selected. Color, Finish comes from the General purpose.

Rest of things is similar to that of above forms.

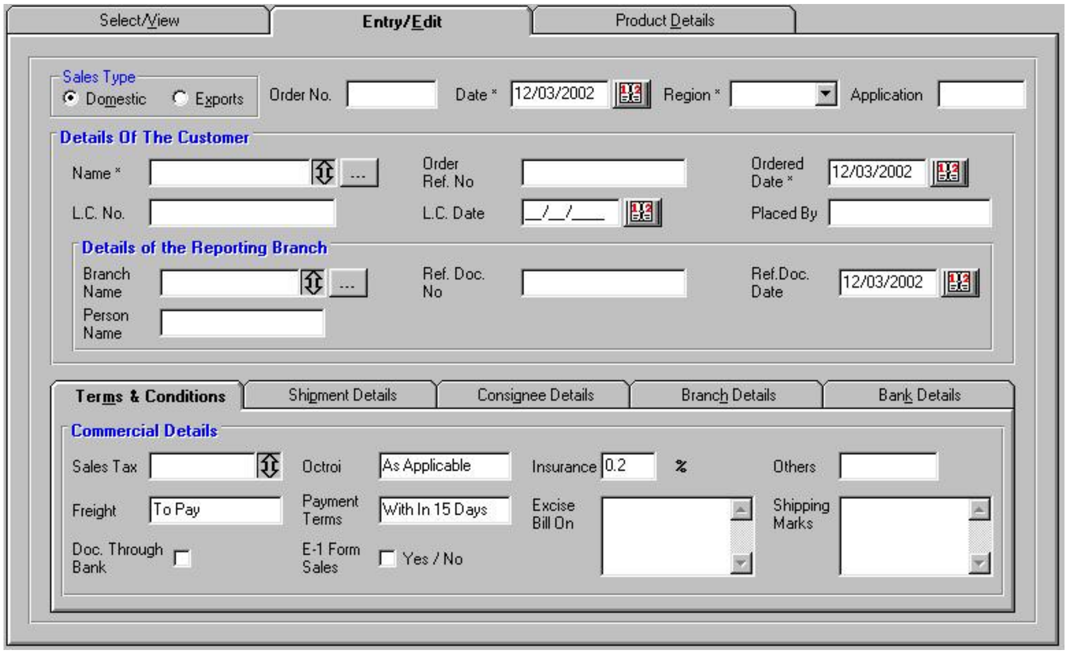
Transaction Forms Information

In the Transaction forms are classified in following way.

Sales Order, Indent, Finished Goods, Deliver Challan, Pending Indents, Excise Invoice.

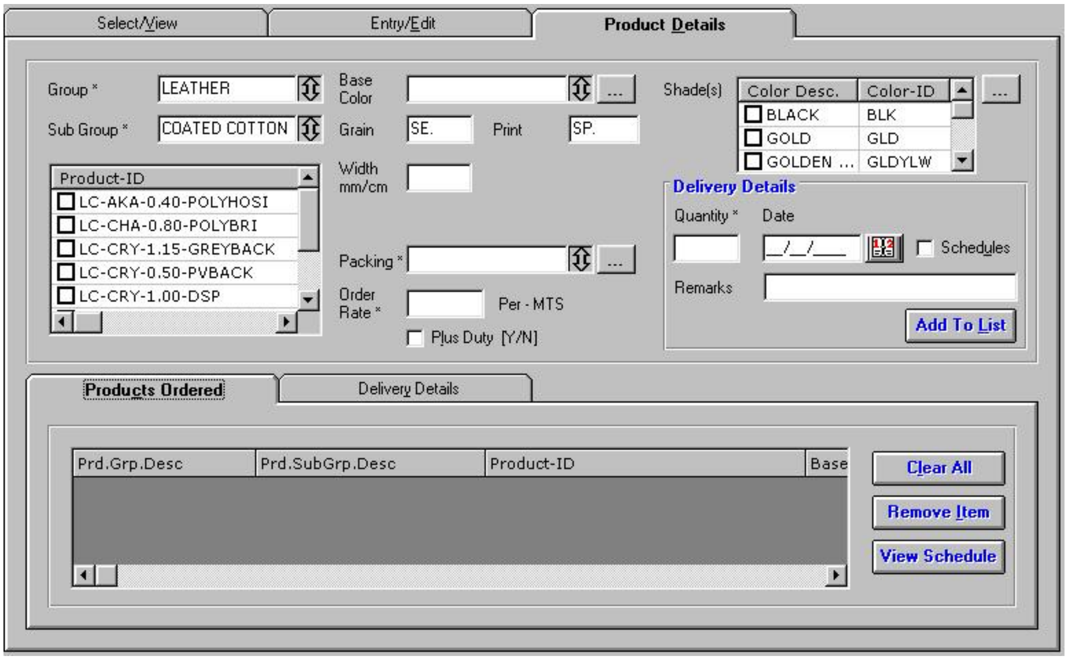
Sales Order:

While Click on the Transactions menu, select the Sales Order option; the following screen will be displayed.



This form is used to raise the Customers Sales Order. You can enter the sales order based on the Region wise. In this form Name come from Customer Master, Branch Come form General Purpose, Sales Tax comes from the Tax Master. Once you can select the Select the Customer then automatically displays the Consignee Details, Branch Details, Bank Details of that selected Customer, all these information already we entered in the Customer Master Form.

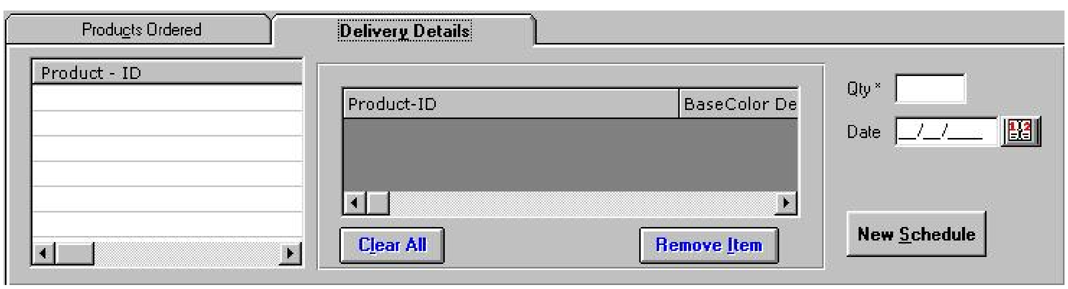
If you select the Product Details Tab, the following form is displayed.



In this Product Details Tab, Group and Sub Group From the Product Classification Form, Base Color, Shades, Packing comes from the General Purpose.

This tab provides another facility is available, you provide the schedules as per customer request. Once you can check the Schedules Check Box, then Delivery Details Tab is activated. In this you can enter no. of Schedules for each product.

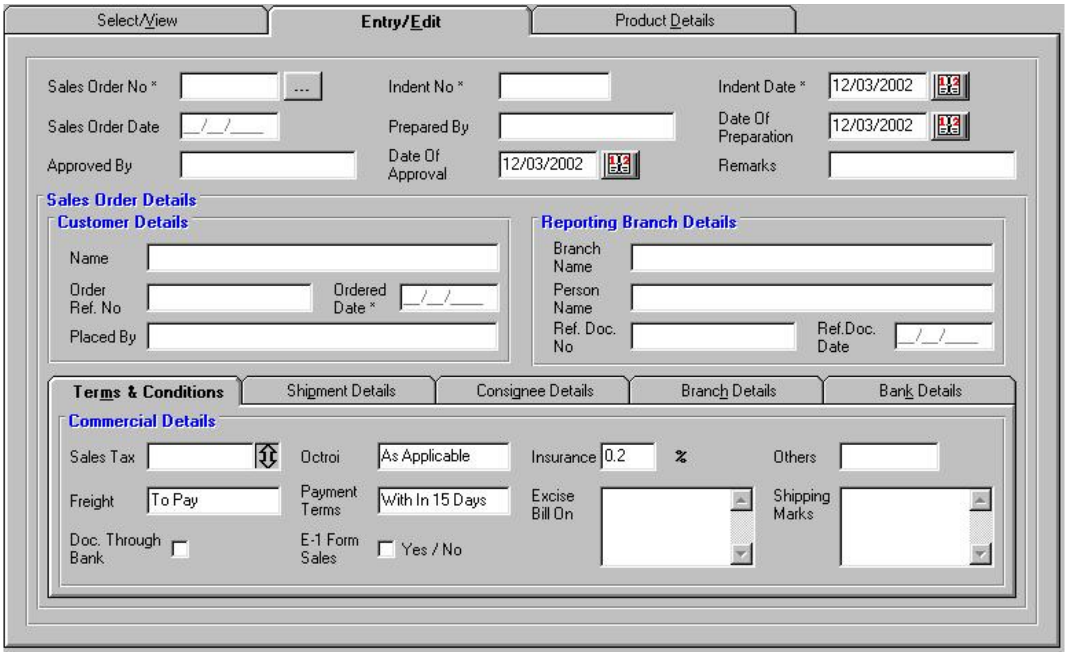
The Deliver Details Tab like the following way.



In this tab we can create no. of schedule as customer's request.

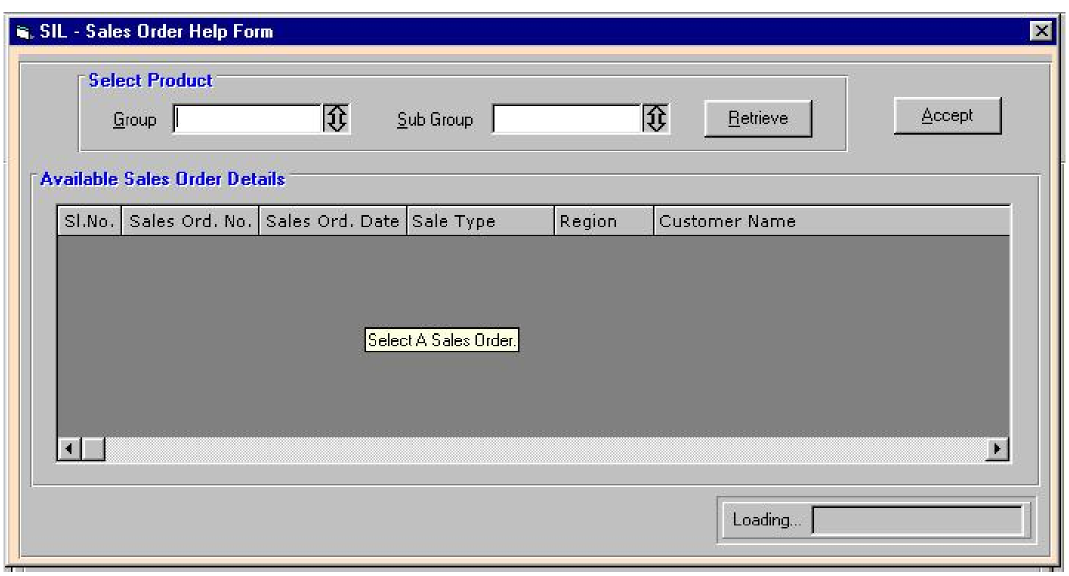
Indent Form:

While Click on the Transactions menu, select the Indent option; the following screen will be displayed.



This is similar to the Sales Order form but only the difference is in this you can enter Indent No and Indent Date and then save. Mainly this form is used to send the Production Department. Based on this form Production peoples make the goods.

In this you can enter the Sales Order No or Press the button that is next to Sales Order No field. Sales Order help form displays like this,

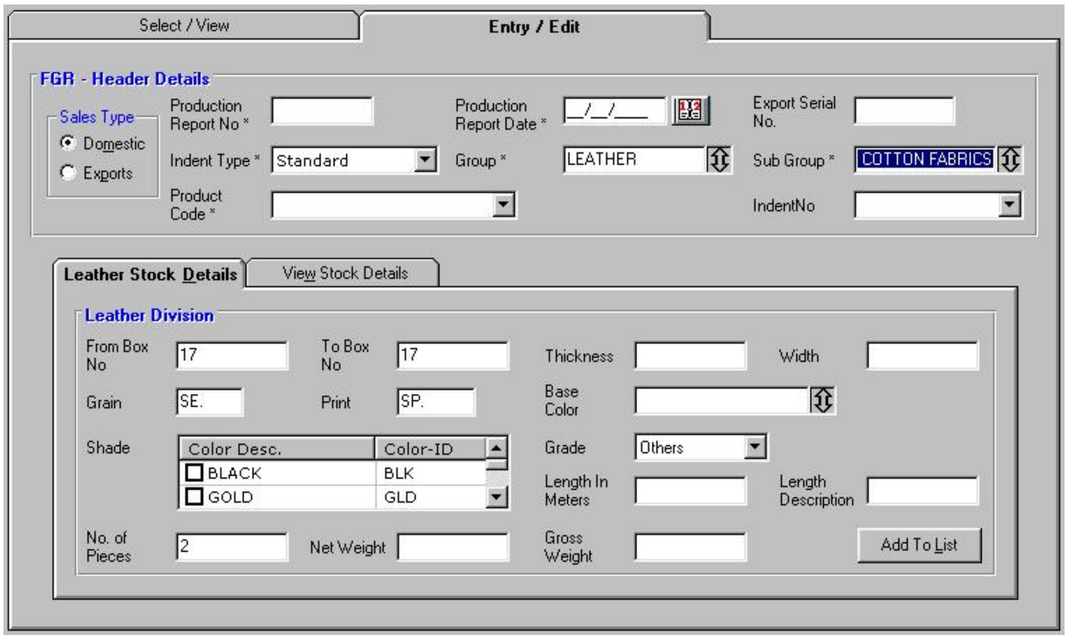


Once you can select the Sales Order in the Grid and then Press Accept Button, related Sales Order information is displayed in the related fields in the Indent Form.

Rests of the things are same for the above forms.

Finished Goods Receipt:

While click on the Finished Goods Receipt form in the Transactions menu the following screen will be displayed.



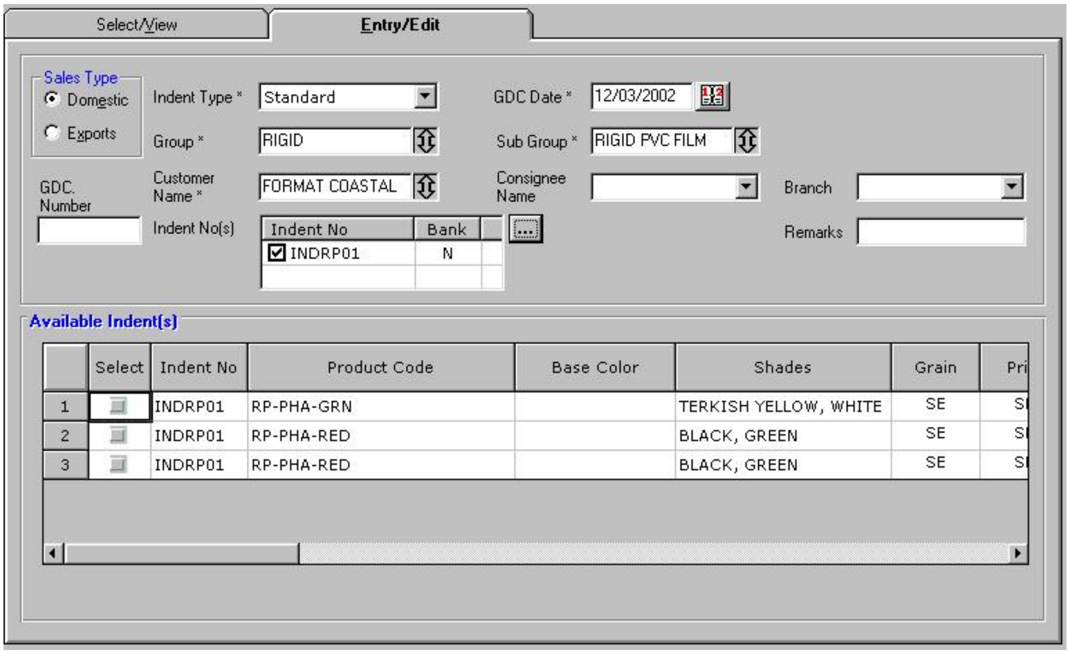
This form is used to the Store the Finished Goods Information. Once the particular Product(s) has production was finished, then you can enter the data in this form. In this Group, Sub Group comes from Product Classification Form, Shades and Base Colors are comes from General Purpose.

Once you can enter the data in this form, you can access this information in the Delivery challan form.

Rests of the things are similar to above forms.

Delivery Challan:

While click on the Delivery Challan form in the Transactions menu the following screen will be displayed.

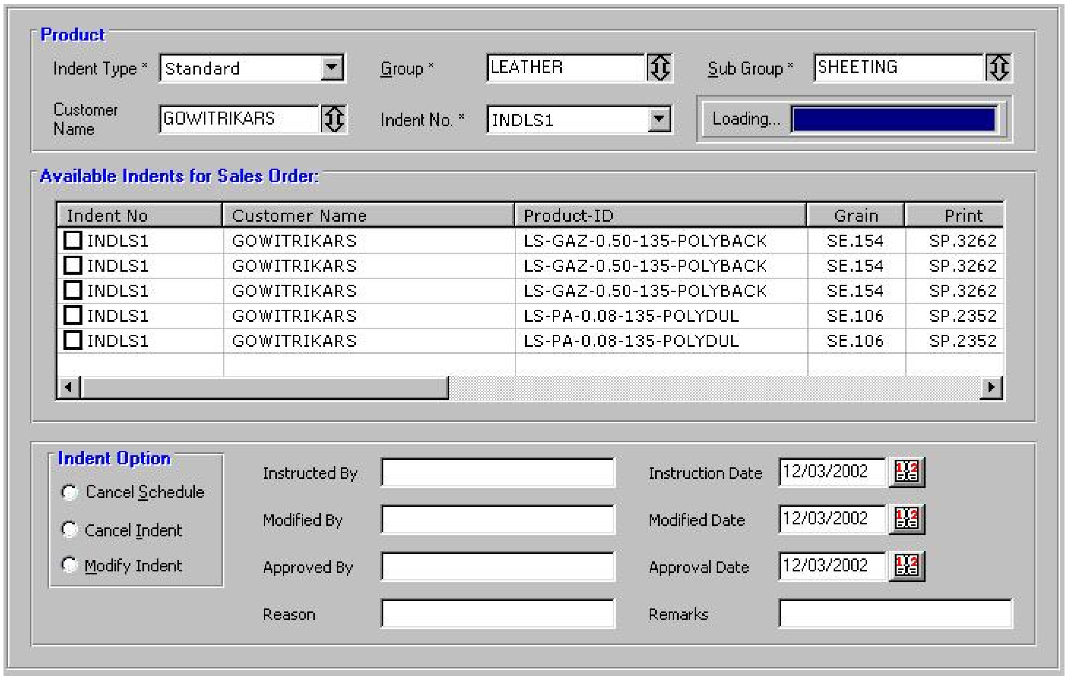


This form is used to raise the Delivery challan to Customer from Factory. In this Group, Sub Group comes from the Product Classification Form. Once you can select the Group and Sub Group, Customer will be displayed automatically, when you select the Customer then related Indent No(s) should be displayed. Now you can select the required indents then press Button that is near to the List View. If button is pressed the corresponding Indent Details should be displayed. You can check the relevant the indents and select the Case No(s).

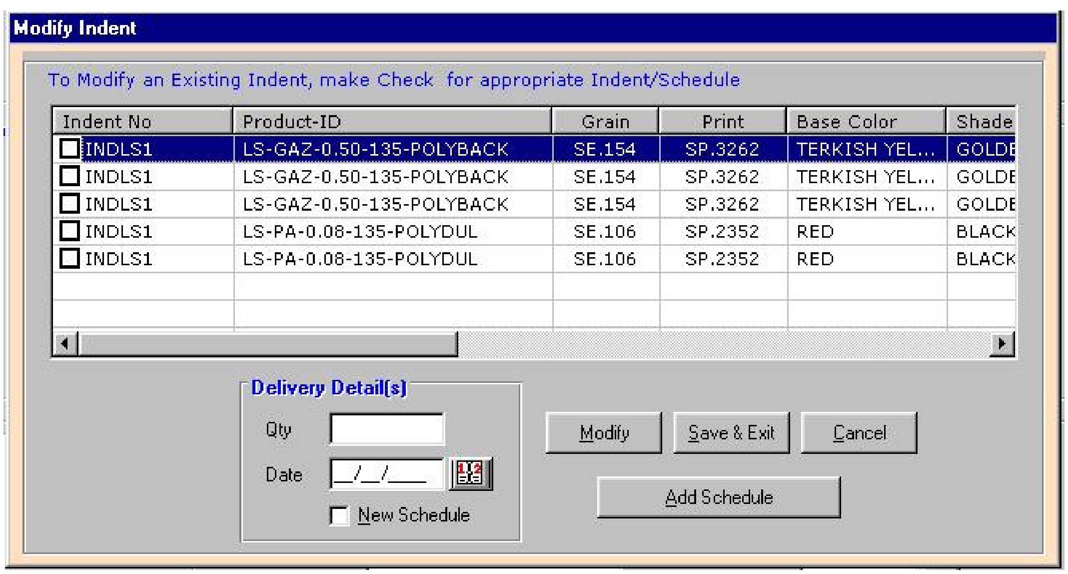
Rest of things is same form above forms.

Pending Indents:

While click on the Pending Indents in the Transactions Menu, the following form will be displayed.



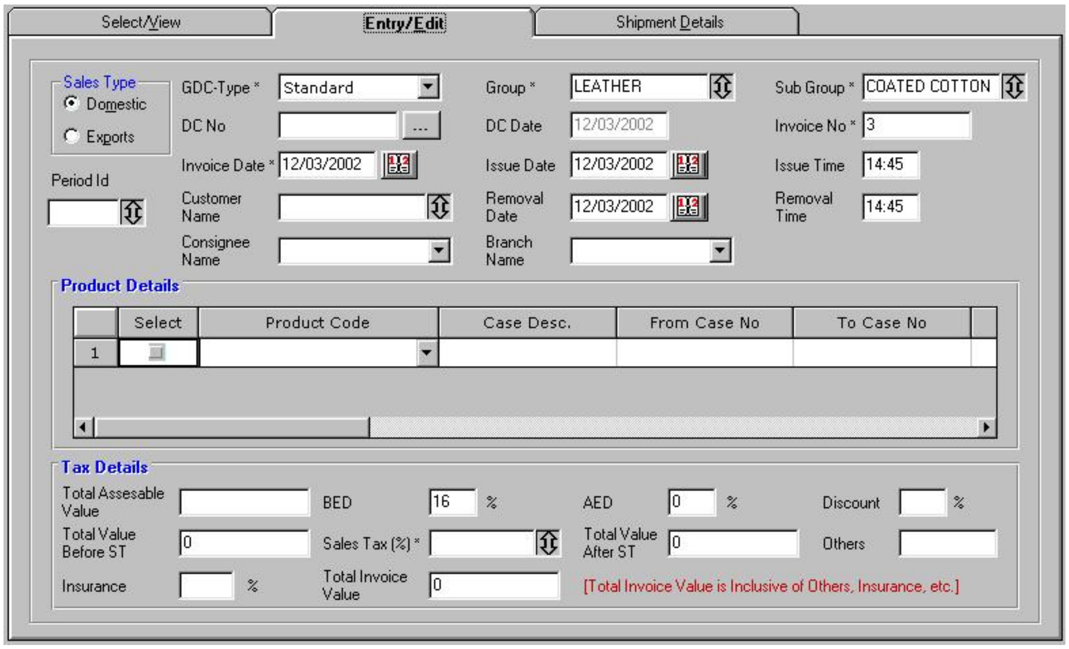
This form is used to show the Pending Indents of Particular Customer have Indents. Using this form you can cancel the Schedules, Modify the Indent or Cancel the Indent based on the options available. If you choose the Modify the Indent Option the following sub form will be displayed.



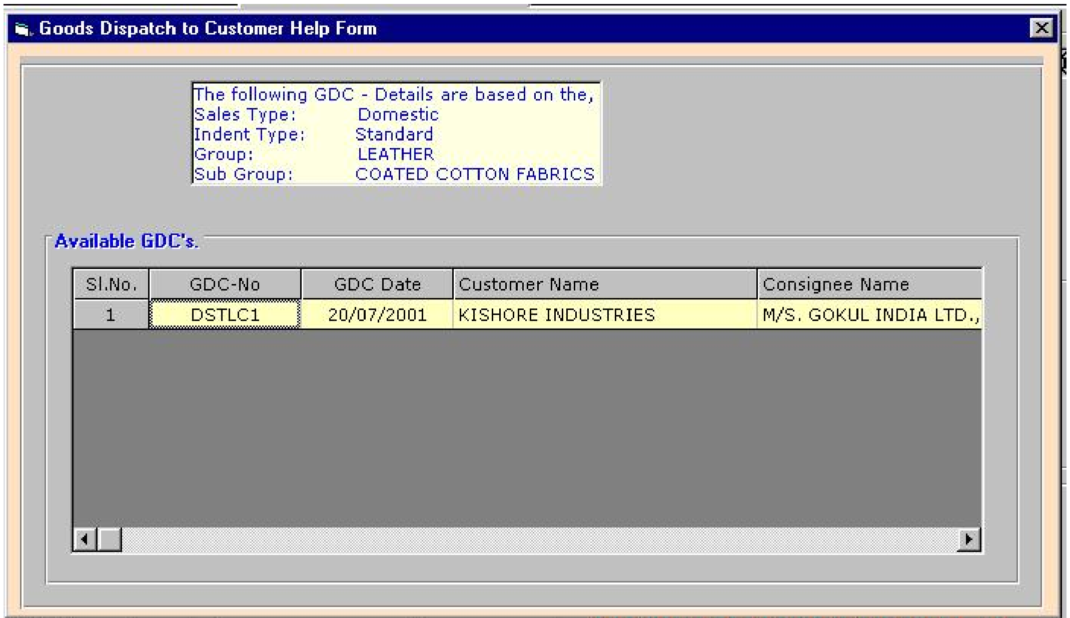
With the help of the above form you can Add the Schedule or modify the schedules as per your requirement.

Excise Invoice:

While click on the Excise Invoice in the Transactions Menu, the following form will be displayed.

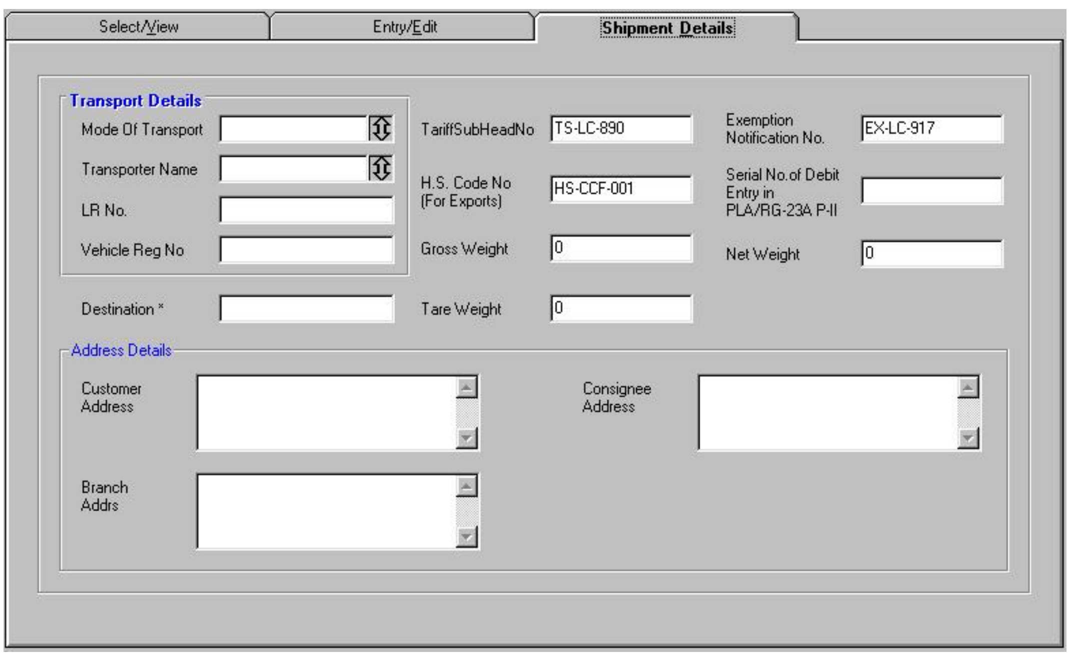


This form is used to raise the Excise Invoice to Customer. In this Group, Sub Group data comes from the Product Classification Form. Sales Tax comes from the Tax Master Form. Once enter the DC No then it displays the related information of that DC No. DC No can also select from the following help form.



With the help of this form just double click on the grid, then the corresponding information should be displayed.

After enter all the information in the Entry/Edit Tab you can enter the Shipment details. The Shipment details tab as follows:

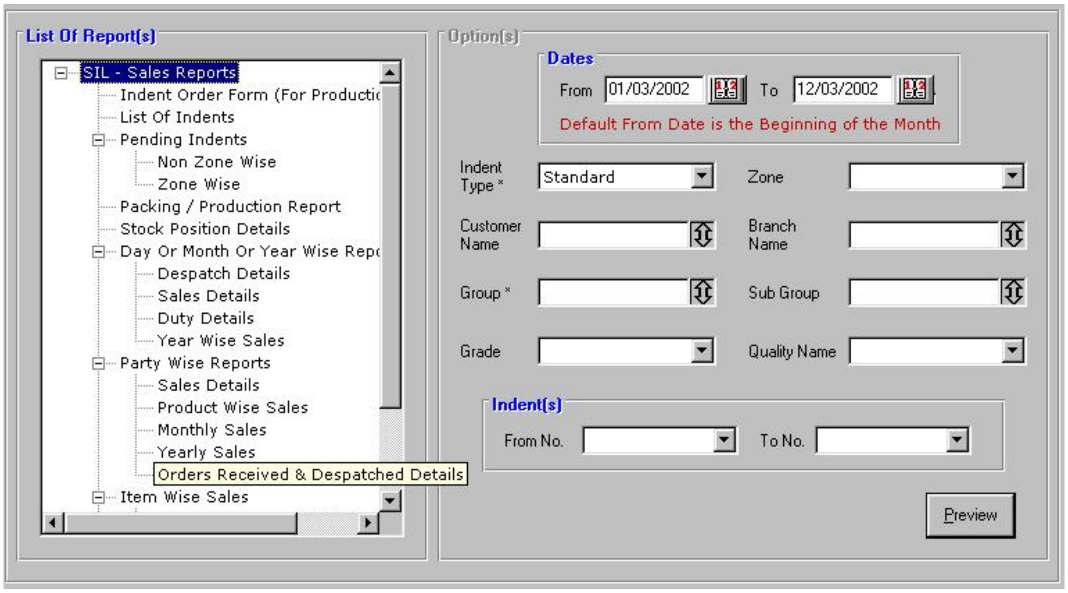


In this tab, Mode of Transport, Transporter Name comes from the General Purpose.

Rest of the process is same for the previous forms.

Reports:

While click on the Sales Report in the Reports Menu, the following form will be displayed.



This form shows the variety of reports, which are related to this Module.