



# **Business Blueprint and Key Setup – ERPNext Aarti Steels Ethiopia Order to Cash**

Ver1.0  
Date 31-Oct-23



**Our strength is our commitment to excellence.**

# Business Overview

- Aarti Steels is in the business of steel products that include Steel Tubes, Corrugated Galvanized and color coated sheets.
- The manufacturing operations are carried out from a single location in Ethiopia
- Head office is in a separate location within Ethiopia
- The sales are primarily in Ethiopia
- Sales team primarily operates from the Head Office in Addis Ababa
- This document covers the key setup and process flow for the order to cash Process

# Sales Processes



QUOTATION APPROVAL\*\* Workflow :  
\*\*\*Proforma invoice is created after quotation confirmation

# Order To Cash Flow

# Lead Creation

# Lead Creation

CRM > Lead

Search or type a command (Ctrl + G)

Help

Lead

List View

+ Add Lead

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Tags

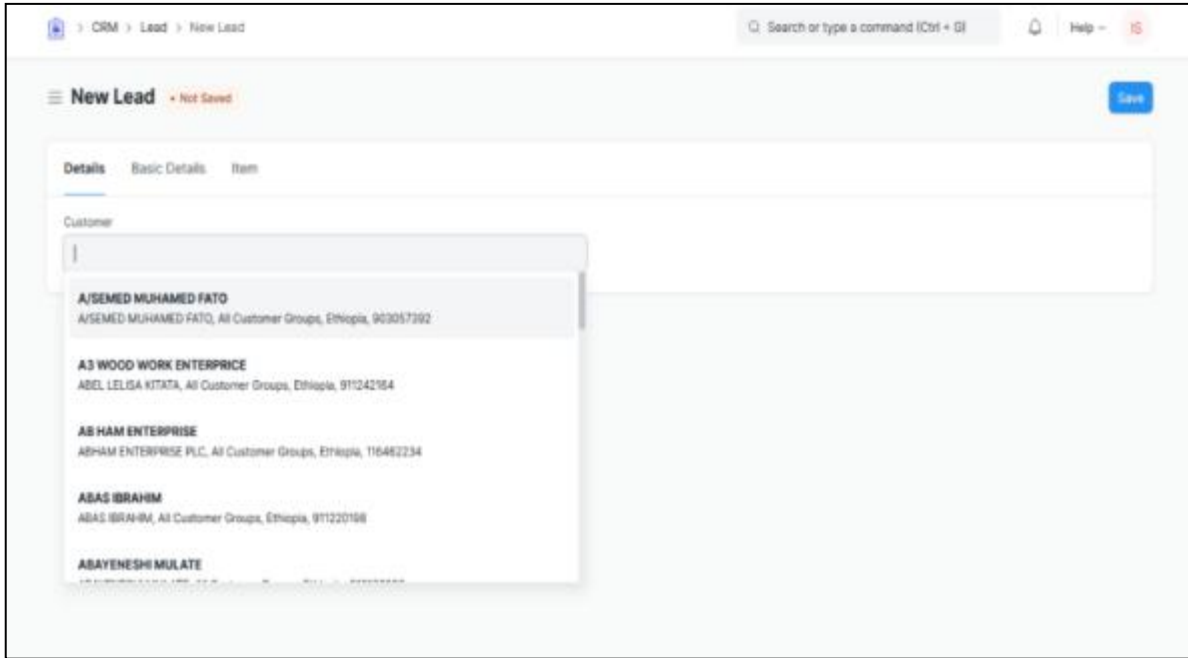
Save Filter

Filter Name

ID	Job Title	Status	Organization Name	Territory	ID	Last Updated On
						20 of 22
	HAYMETAT TRADING I	Converted	HAYMETAT TR--	Ethiopia	CRM-LEAD-T7--	- 38 m
	ZETA CONSETERACTI	Converted	ZETA CONSET--		CRM-LEAD-T7--	- 54 m
	ajit	Quotation			CRM-LEAD-T7--	- 55 m
	MECHAL FANTAYE	Converted	MECHAL FANT--		CRM-LEAD-T7--	- 3 h
	HIWOT AYALEW	Opportunity	HIWOT AYALEW	Ethiopia	CRM-LEAD-T7--	- 1 d
	TESFYIE FIYESA DUGJ	Opportunity	TESFYIE FIYES--		CRM-LEAD-CL--	- 1 d
	TEFERA GEREMEW	Lead			CRM-LEAD-T7--	- 2 d
	BERMEKON ENGINEER	Opportunity		Ethiopia	CRM-LEAD-T7--	- 2 d
	BERMEKON ENGINEER	Lead		Ethiopia	CRM-LEAD-T7--	- 2 d
	RAHEL & TSEDALE CO	Opportunity		Ethiopia	CRM-LEAD-T7--	- 2 d
	Mr BIRHANAE AZIBITA	Opportunity			CRM-LEAD-T7--	- 2 d
	MESANU METALS ANI	Quotation	MESANU MET--	Ethiopia	CRM-LEAD-T7--	- 2 d
	Pandiyen NY	Converted			CRM-LEAD-T7--	- 2 d
	MOONSHINE CONSTR	Converted	MOONSHINE ...	Ethiopia	CRM-LEAD-T7--	- 3 d
	MEBRAHTU MOGES	Converted			CRM-LEAD-T7--	- 3 d

- To create New Lead Click on Add Lead Button

# Lead-Details



The screenshot shows a web application interface for creating a new lead. The breadcrumb navigation at the top reads 'CRM > Lead > New Lead'. A search bar contains the text 'Search or type a command (Ctrl + G)'. The page title is 'New Lead' with a status indicator 'Not Saved' and a 'Save' button. Below the title, there are tabs for 'Details', 'Basic Details', and 'Item'. The 'Customer' field is active, and a dropdown menu is open, displaying a list of customer entries. Each entry includes a name and a phone number.

Customer Name	Phone Number
A/SEMED MUHAMED FATO	903057392
A3 WOOD WORK ENTERPRICE	911242164
AB HAM ENTERPRISE	116462234
ABAS IBRAHIM	911220168
ABAYENESHI MULATE	

- In Details Customer Field Is there, find customer from dropdown list or by searching.
- If You found Customer, then Go to Opportunity Because of existing Customer.
- If you Didn't find customer, so you have to create Lead and fill Basic details and required items

# Lead-Basic Details

The screenshot shows the 'New Lead' form in a CRM system. The 'Basic Details' section is highlighted with a red box. This section includes fields for: Status (set to 'Lead'), Gender, Source, Lead Type, and Request Type. Other sections visible include 'Contact Info' (Email, Mobile No, WhatsApp, Phone, Phone Ext), 'Organization' (Organization Name, Annual Revenue, Territory, No. of Employees, Industry, Market Segment, Fax), and 'Address & Contacts' (City, State, Country).

- Enter All basic details as required
- \* Mark fields are mandatory

The screenshot shows the 'New Lead' form with the 'Address & Contacts' and 'Qualification' sections expanded. The 'Address & Contacts' section includes fields for City, State, and Country (set to 'Ethiopia'). The 'Qualification' section includes fields for Qualification Status (set to 'Unqualified'), Qualified By, and Qualified on. The 'Additional Information' section includes Campaign Name, Company (set to 'Aarti Steels PLC, Ethiopia'), First Language (set to 'English'), and checkboxes for 'Disabled', 'Unsubscribed', and 'Blog Subscriber'.

# Lead- Items

The screenshot shows the 'New Lead' form in a CRM system. The 'Item' tab is selected and highlighted with a red box. Below the tabs is an 'Item Table' with the following data:

No.	Item Code	Qty	Rate *	Amount *	
1	PGB-00041	120	Br 775.00	Br 93,000.00	Edit

An 'Add Row' button is located at the bottom left of the table.

- In this Item Tab Enter All required items

# Lead- Understanding Connection

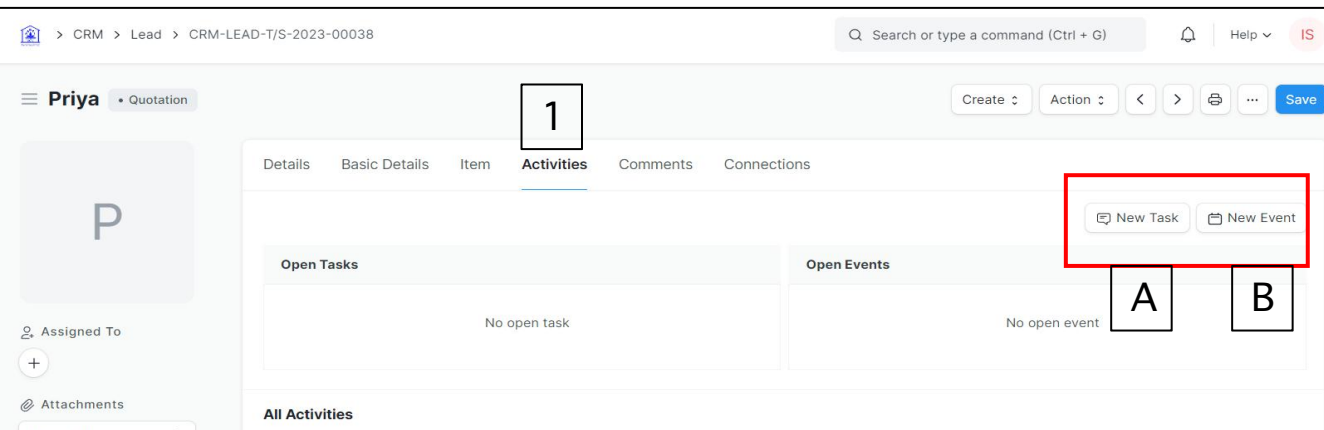
The screenshot displays a CRM interface for a lead record. The breadcrumb navigation at the top shows 'CRM > Lead > CRM-LEAD-1/5-2023-00038'. The user's name 'Priya' is visible in the top left. The 'Connections' tab is selected, showing options to add 'Opportunity', 'Quotation', and 'Prospect'. Annotations with red boxes and arrows point to the breadcrumb, the user name, and the 'Opportunity' button.

Lead Number Has been Created After save

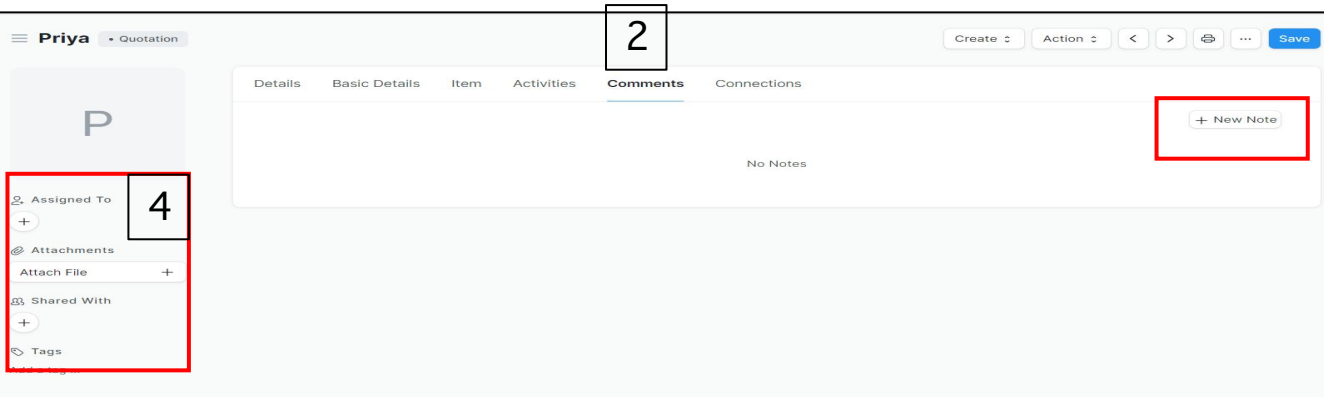
Lead Name Has been Created After save

- After saving Lead there are Three more sections
- In connection you can see all related reference documents, Which are Linked to each other

# Lead- Activity / Comment



This screenshot shows the 'Activities' tab of a CRM lead record. The breadcrumb path is CRM > Lead > CRM-LEAD-T/S-2023-00038. The 'Activities' tab is selected and highlighted with a box labeled '1'. In the top right of the activity section, there are buttons for 'New Task' and 'New Event', both highlighted with a red box. Below these buttons are two panels: 'Open Tasks' (containing 'No open task') and 'Open Events' (containing 'No open event'). The 'Open Events' panel has two boxes labeled 'A' and 'B' below it. The left sidebar shows the user 'Priya' and options for 'Assigned To', 'Attachments', and 'All Activities'.

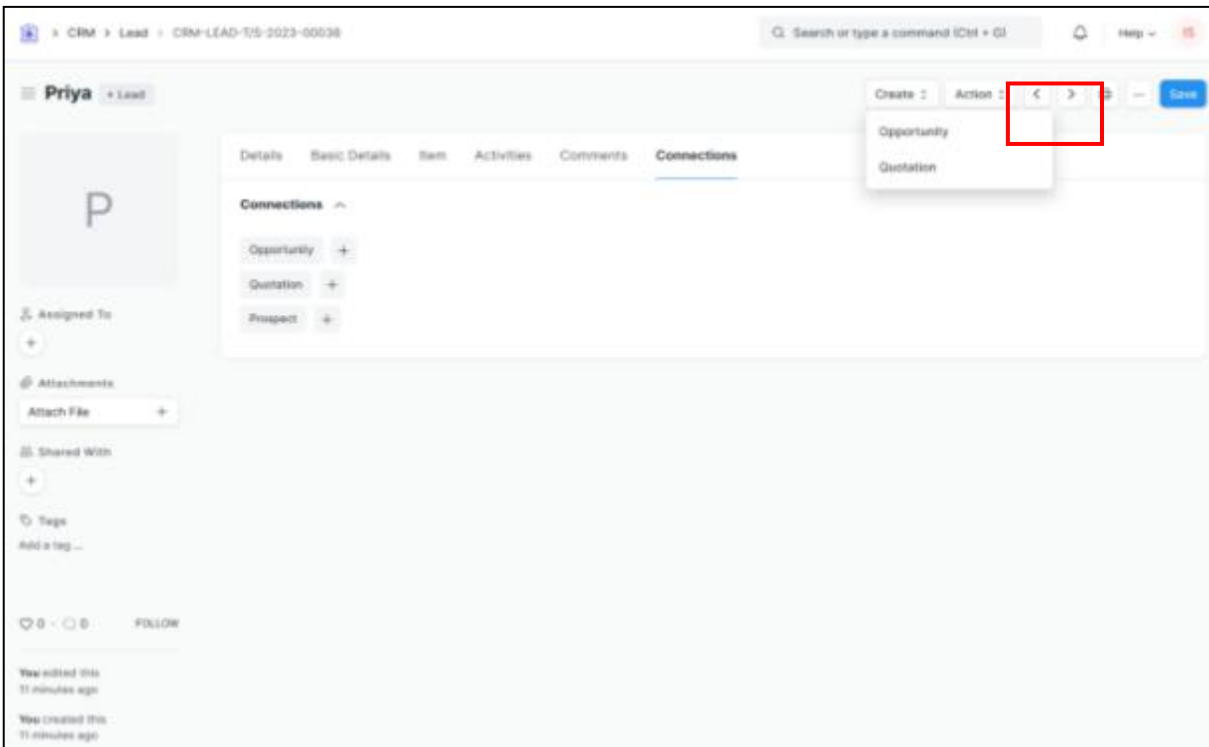


This screenshot shows the 'Comments' tab of the same CRM lead record. The breadcrumb path is CRM > Lead > CRM-LEAD-T/S-2023-00038. The 'Comments' tab is selected and highlighted with a box labeled '2'. In the top right of the comment section, there is a button for '+ New Note', highlighted with a red box. The main content area shows 'No Notes'. The left sidebar is expanded, showing 'Assigned To', 'Attachments', 'Shared With', and 'Tags', all highlighted with a red box and a box labeled '4'.

- 1. In Activity you can create:
  - A. Task- This task you can use for upcoming commitments to track new requirement amendment regarding price
  - B. Event- This Event you use to schedule Next Meet In calendar
- 2. Comments- This can you use to track all communication with customer
- 3. There is Attachment section – if any doc. You have attach regarding drawing or parameter

Lead to Opportunity

# Lead- Convert to Opportunity



The screenshot displays a CRM interface for a lead named 'Priya'. The breadcrumb navigation shows 'CRM > Lead > CRM-LEAD-TIS-2023-00038'. A search bar at the top right contains the text 'Search or type a command (Ctrl + G)'. The lead's name 'Priya' is shown with a '+ Lead' link. Below the name, there are tabs for 'Details', 'Basic Details', 'Item', 'Activities', 'Comments', and 'Connections'. The 'Connections' tab is active, showing a list of connection types: 'Opportunity', 'Quotation', and 'Prospect', each with a '+' icon. A dropdown menu is open over the 'Action' button, with the 'Opportunity' option highlighted by a red box. The left sidebar contains sections for 'Assigned To', 'Attachments', 'Shared With', and 'Tags'. At the bottom, there are social media-style icons for 'Like', 'Comment', and 'Follow', along with a log of recent actions: 'We edited this 11 minutes ago' and 'We created this 11 minutes ago'.

- After saving the Lead you get Create button
- From here you can create Opportunity for that lead
- Quotation will be generated only when the pricing is needed from customer/ When customer is ready for the services / needs proforma invoice , then use this option

# Opportunity

2023-00049

## Create Opportunity

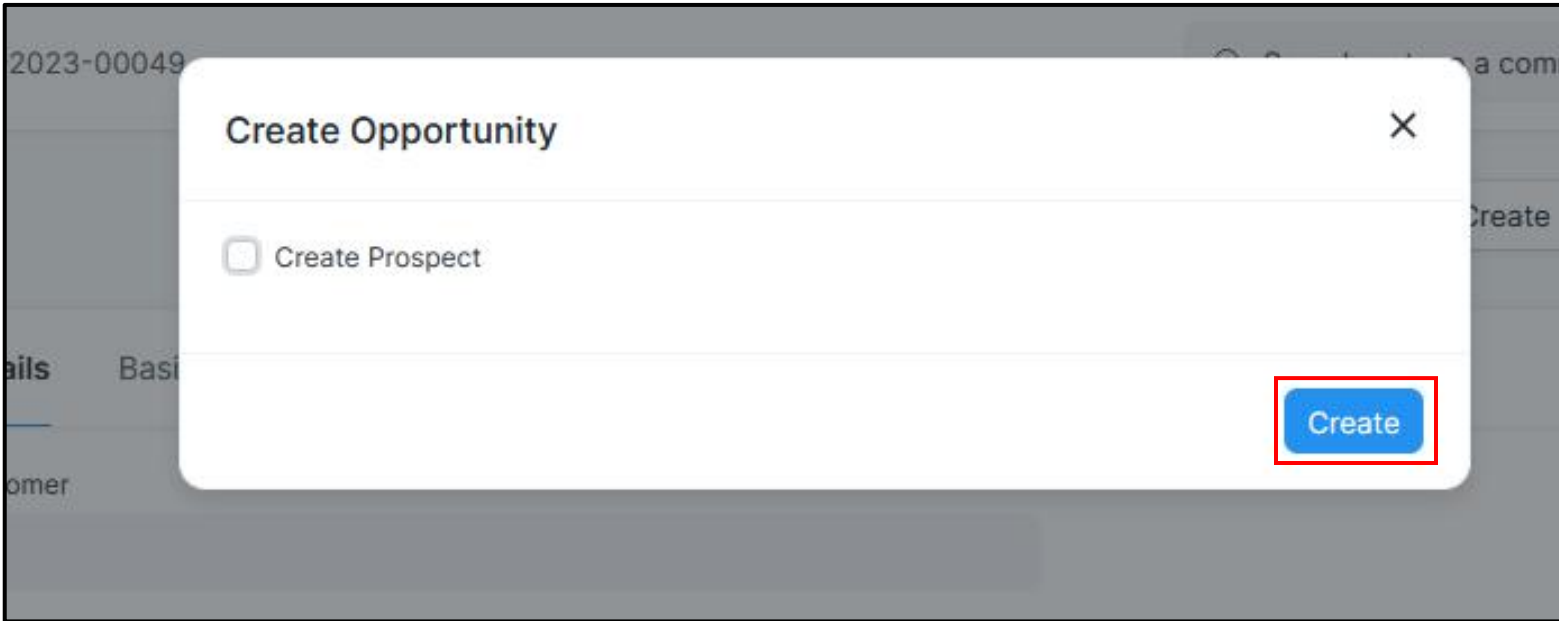
Create Prospect

Prospect Name

Create

- After click on Opportunity , you will get this form.
- Just uncheck check box of 'create Prospect' and you will be able to create Opportunity.

# Opportunity



- After untick check box of create Prospect, click on create button to create “Opportunity”.

# Opportunity – Details

> CRM > Opportunity > New Opportunity

Search or type a command (Ctrl + G) Help IS

### New Opportunity

Not Saved Save

**Details** | Contacts | Items

Series *	Opportunity Type	Sales Stage
CRM-LEAD-T/S -.YYYY.-	Sales	Prospecting
Opportunity From *	Source	Expected Closing Date
Lead		
Lead *	Opportunity Owner	Probability (%)
CRM-LEAD-T/S-2023-00049	support@indibasolution.com	100.000
Status *		
Open		

**Organization**

No of Employees	Industry	City
1-10		
Annual Revenue	Market Segment	State
0.00		
	Website	Country
		Ethiopia
		Territory

- Here this is the form you will see.
- Fill the details

# Opportunity– Details

## Opportunity Value

Currency

ETB

Opportunity Amount (ETB)

0.00

## More Information ^

Company \*

Aarti Steels PLC, Ethiopia

Print Language

English

Opportunity Date \*

31-10-2023

- Add Opportunity values and More information etc.

# Opportunity – Contacts

The screenshot shows a web interface for creating a new opportunity. The breadcrumb trail is CRM > Opportunity > New Opportunity. A search bar at the top right contains the text 'Search or type a command (Ctrl + G)'. The page title is 'New Opportunity' with a 'Not Saved' indicator and a 'Save' button. The 'Contacts' tab is selected and highlighted with a red box. Below the tabs, the 'Primary Contact' section contains several input fields: 'Contact Person' (with 'Test Lead' entered), 'Contact Email', 'WhatsApp', 'Job Title', 'Contact Mobile', 'Phone', and 'Phone Ext.'. The 'Address & Contact' section is visible at the bottom of the form.

- Go to contact s tab for add contact details like mob no., Email – ID etc.

# Opportunity – Items

**New Opportunity** • Not Saved

Details Contacts **Items**

Items

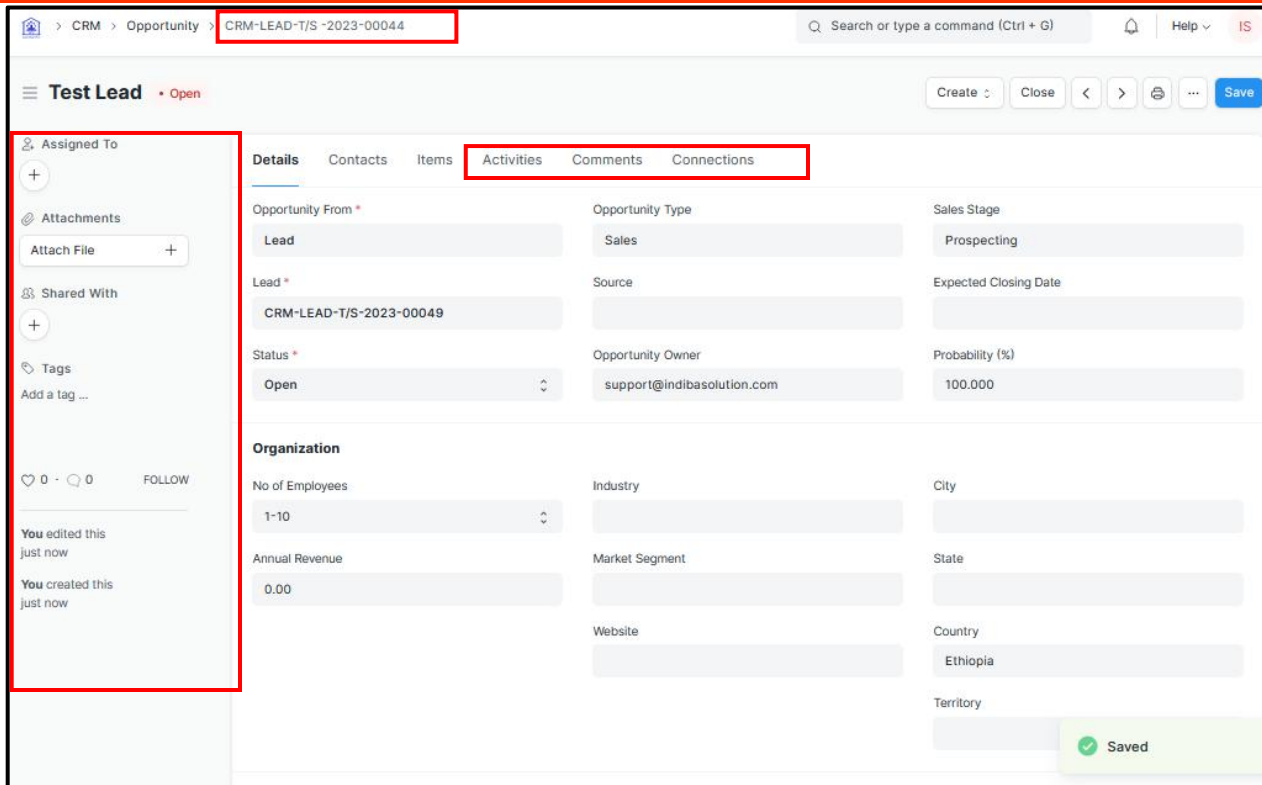
<input type="checkbox"/>	No.	Item Code	Item Name	Qty	Rate (ETB) *	Amount (ETB) *	
<input type="checkbox"/>	1	COM-00042		1	<b>Br 10.00</b>	<b>Br 10.00</b>	

Add Multiple **Add Row**

Total (ETB)  
Br 0.00

**Save**

- A. Then there is “Items” tab ,here you add the no of items
- B. By click on ‘Add Row’ button, you are able to add multiple items.
- C. After filling Opportunity form, Click on ‘Save’ Button.



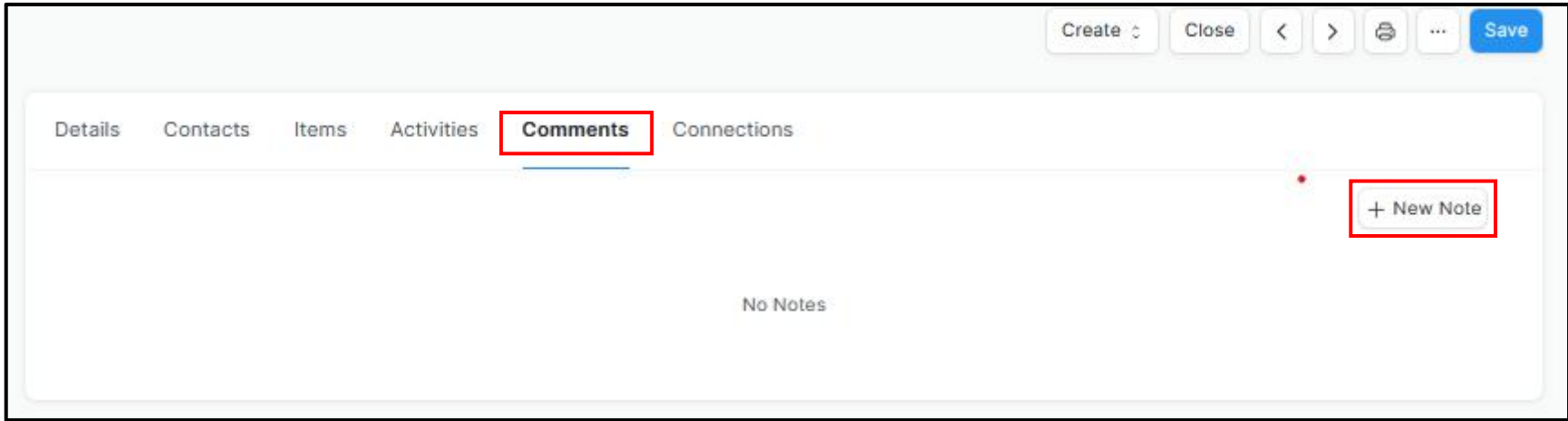
- After saving Opportunity, 'Activities', 'Comments', 'Connections' tab are enabled.
- Also Opportunity Id Created.
- There is Attachment section – if any doc. You have to attach regarding drawing or parameter or you can assign it also.

# Opportunity – Activity

The screenshot shows the 'Opportunity – Activity' interface. At the top, there are buttons for 'Create', 'Close', navigation arrows, a printer icon, and a 'Save' button. Below this is a navigation bar with tabs for 'Details', 'Contacts', 'Items', 'Activities', 'Comments', and 'Connections'. The 'Activities' tab is highlighted with a red box, and a blue arrow points from it to a red circle containing the number '1'. To the right of the 'Activities' tab, there are two buttons: 'New Task' and 'New Event', both highlighted with red boxes. A blue circle labeled 'A' has an arrow pointing to the 'New Task' button. Below the 'New Event' button, a blue circle labeled 'B' has an arrow pointing to the 'Open Events' section. The 'Open Tasks' section contains the text 'No open task'. The 'Open Events' section contains the text 'No open event'. At the bottom, the 'All Activities' section shows a 'New Email' button and a timeline entry: 'You created this 10 minutes ago • You edited this 10 minutes ago'.

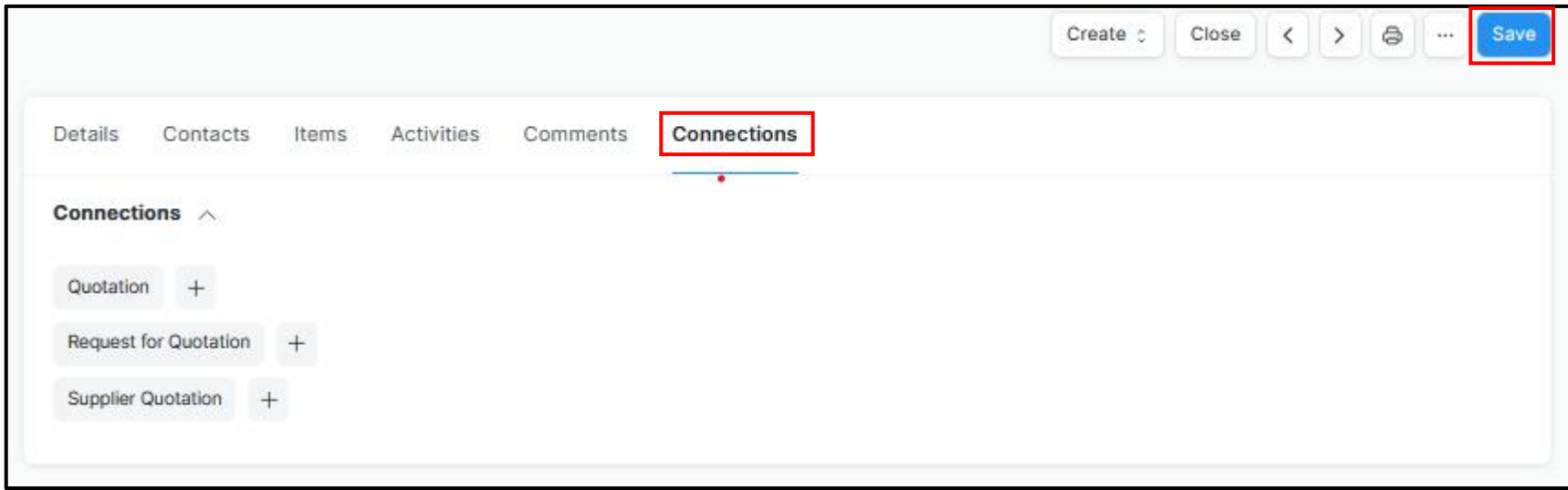
- 1. In Activity you can create:
- A. Task- This task you can use for upcoming commitments to track new requirement amendment regarding price
- B. Event- This Event you use to schedule Next Meet In calendar

# Opportunity – Comments



1. Comments- This can you use to track all communication with customer
2. New Note – Click on new Note to add comments.

# Opportunity – Connections



- Connections – You can see the linked documents with Opportunity.

# Quotations

# Quotation

The screenshot displays a CRM interface for a record titled "Test Lead" (Status: Open). The breadcrumb navigation shows the path: CRM > Opportunity > CRM-LEAD-T/S -2023-00044. A search bar at the top right contains the text "Search or type a command (Ctrl + G)". The main header includes a "Create" button (highlighted with a red box), a "Close" button, navigation arrows, a print icon, a more options icon, and a "Save" button. A dropdown menu is open from the "Create" button, showing "Customer" and "Quotation" (highlighted with a red box). The main content area has tabs for "Details", "Contacts", "Items", "Activities", "Comments", and "Connections" (the active tab). Under the "Connections" tab, there is a section titled "Connections" with a dropdown arrow, containing three items: "Quotation" with a plus icon, "Request for Quotation" with a plus icon, and "Supplier Quotation" with a plus icon. On the left sidebar, there are sections for "Assigned To", "Attachments" (with an "Attach File" button), "Shared With", and "Tags".

- After save opportunity, Create button is enabled.

# Quotation– Details

Selling > Quotation > New Quotation

Search or type a command (Ctrl + G) | Help | IS

**New Quotation** • Not Saved | Get Items From | ... | Save

**Details** | Address & Contact | Terms | More Info

Series \*  
SAL-QTN-.YYYY.-

Date \*  
31-10-2023

Order Type \*  
Sales

Quotation To \*  
Lead

Valid Till  
15-11-2023

Lead \*  
CRM-LEAD-T/S-2023-00049

Customer Name  
Test Lead

**Currency and Price List** ▾

Scan Barcode

No.	Item Co...	Item Name *	No of Pc	Cutting ...	Quantity *	Rate (E...	Commis...	Unit Sal...	Amount ...	
1	PGH-00...	PPGI EGA 500 0.25X10...	1000	2.1	2,100	Br 786.00	6	780	Br 1,650,60	Edit
2	PGR-00...	PPGI RIDGE COVER 0.3...	500	4.1	2,050	Br 556.00			Br 1,139,80	Edit
3	PGF-00...	PPGI FLASHING 0.32X3...	200	4.8	960	Br 586.00			Br 562,560	Edit

Download

- Details – We can add details.
- We can add no of piece, Cutting length and Commission as per requirements in Item table

# Quotation — Tax & Charges

> Selling > Quotation > New Quotation

Search or type a command (Ctrl + G) Help 15

Details Address & Contact Terms More Info

### Taxes and Charges

Tax Category Shipping Rule Incoterm

Sales Taxes and Charges Template

VAT Payable - 15%

Sales Taxes and Charges

<input type="checkbox"/>	No.	Type *	Account Head *	Rate	Amount (ETB)	Total (ETB)	
<input type="checkbox"/>	1	On Net Total	11420-01 - Input VAT @ 15 % ...	15	Br 1.30	Br 10.00	Edit

Add Row

Total Taxes and Charges (ETB)

Br 1.30

### Totals

Grand Total (ETB)

Br 10.00

Rounding Adjustment (ETB)

Br 0.00

Rounded Total (ETB)

Br 10.00

- Here we can add, Tax & charges as per items.
- And it will reflect in Sales tax & charges table

# Quotation form

**Additional Discount** ^

Apply Additional Discount On

Grand Total

Coupon Code

Additional Discount Percentage

Additional Discount Amount (ETB)

Referral Sales Partner

---

**Tax Breakup** ^

Taxes and Charges Calculation

Item	Taxable Amount	Input VAT @ 15 %
COM-00042	Br 8.70	(15.0%) Br 1.30

- Also if there is any discount applied, you can add here.

# Quotation Entry – Contd..

> Selling > Quotation > New Quotation

Search or type a command (Ctrl + G) Help IS

## New Quotation

Not Saved

Get Items From Opportunity Save

Details Address & Contact Terms More Info

Series \* SAL-QTN-YYYY-- Date \* 31-10-2023 Order Type \* Sales

Quotation To \* Lead Valid Till 15-11-2023

Lead \* CRM-LEAD-T/S-2023-00049

Customer Name Test Lead

Currency and Price List

Scan Barcode

Items

No.	Item Code *	Item Name *	No of Pc	Cutting Le...	Quantity *	Rate (ETB)	Commision	Unit Sale P...	Amount (E...	
1	COM-0004...	ALUMINIUM BUCKET			1	Br 10.00			Br 10.00	Edit

Add Multiple Add Row Download Upload

- While creating Quotation from Opportunity, we can get “Get Items From” Button.
- From this also we can get item details from Opportunity.

# Quotation Entry – Contd..

### Select Opportunities ✕

Name: **Test Lead**    Party: **CRM-LEAD-T/S-202**    Opportunity Type: **Sales**

No filters selected

+ Add a Filter Clear Filters

<input type="checkbox"/>	Name	Party Name	Opportunity Type
<input type="checkbox"/>	CRM-LEAD-T/S -202...	CRM-LEAD-T/S-2023...	Sales

Make Opportunity **Get Items**

# Quotation Entry – Contd..

**New Quotation** • Not Saved Get Items From ... Save

Details **Address & Contact** Terms More Info

**Billing Address**

Lead Address

Contact Person

Contact

**Shipping Address**

Shipping Address

**Company Address**

Company Address Name

Company Address

- Add contact details and Address.

# Quotation Entry – Contd..


**New Quotation** • Not Saved Get Items From Save

Details Address & Contact **Terms** More Info

**Payment Terms**

Payment Terms Template

Payment Schedule










<input type="checkbox"/>	No.	Payment Term	Description	Due Date *	Invoice Portion	Payment Amount *	
 No Data							

Add Row

**Terms and Conditions**

Terms

Term Details

Normal --- **B** *I* U ~~ABC~~ **A**          Table

- Here we can add terms and condition Also Payment terms .

# Quotation Entry – Contd..

The screenshot shows a CRM interface for a quotation entry. The breadcrumb path is 'Selling > Quotation > SAL-QTN-2023-00047'. The form title is 'Test Lead' with a 'Draft' status. On the left sidebar, there are sections for 'Assigned To', 'Attachments', 'Shared With', and 'Tags'. The main form area has tabs for 'Details', 'Address & Contact', 'Terms', 'More Info', and 'Connections'. The 'Details' tab is active, showing fields for 'Quotation To' (Lead), 'Date' (31-10-2023), 'Order Type' (Sales), 'Lead' (CRM-LEAD-T/S-2023-00049), 'Valid Till' (15-11-2023), and 'Customer Name' (Test Lead). Below this is a 'Currency and Price List' section with a 'Scan Barcode' field. An 'Items' table is displayed with one row: 'ALUMINIUM BUCKET' with a quantity of 1 and a rate of Br 10.00. At the bottom, there are 'Add Multiple' and 'Add Row' buttons, a 'Download' button, an 'Upload' button, and a 'Total (ETB)' of Br 10.00. A green 'Saved' notification is visible in the bottom right corner. A red box highlights the 'Actions' button in the top right of the form area.

Quotation To +  
Lead

Date +  
31-10-2023

Order Type +  
Sales

Lead +  
CRM-LEAD-T/S-2023-00049

Valid Till  
15-11-2023

Customer Name  
Test Lead

Currency and Price List

Scan Barcode

No.	Item Co...	Item Name *	No of Pc	Cutting ...	Quantit...	Rate (E...	Commis...	Unit Sa...	Amount ...
1	COM-00...	ALUMINIUM BUCKET			1	Br 10.00			Br 10.00

Total Quantity  
1

Total (ETB)  
Br 10.00

Saved

- After Save Quotation, 'Action' button is enable
- Quotation no. will be created on top left corner.

# Quotation —send for approval

The screenshot shows a CRM interface for a Quotation. The top left shows 'Test Lead' with a 'Draft' status. The main form has tabs for 'Details', 'Address & Contact', 'Terms', 'More Info', and 'Connections'. The 'Details' tab is active, showing fields for 'Quotation To' (Lead), 'Date' (31-10-2023), 'Order Type' (Sales), 'Lead' (CRM-LEAD-T/S-2023-00049), 'Valid Till' (15-11-2023), and 'Customer Name' (Test Lead). Below these is a 'Currency and Price List' section with a 'Scan Barcode' field. At the bottom is an 'Items' table with one row: 1 unit of 'ALUMINIUM BUCKET' at a rate of Br 10.00. On the right side, an 'Actions' menu is open, with the 'Send For Approval' option highlighted in a red box.

No.	Item Co...	Item Name *	No of Pc	Cutting ...	Quantit...	Rate (E...	Commis...	Unit Sal...	Amount ...	
1	COM-00...	ALUMINIUM BUCKET			1	Br 10.00			Br 10.00	Edit

- After save Quotation, send it for approval by click on 'Send for Approval' button.

# Quotation –Approval– By sales manager

The screenshot shows a CRM interface for a Quotation. The breadcrumb trail is 'Selling > Quotation > SAL-QTN-2023-00047'. The main header shows 'Test Lead' with a status of 'Pending By Sales Manager'. The 'Actions' menu is open, showing options: 'Approve', 'Reject', 'Send To GM', and 'Help'. The 'Approve' option is highlighted with a red box.

**Details** Address & Contact Terms More Info Connections

Quotation To \*  Date \*  Order Type \*

Lead \*  Valid Till

Customer Name

**Currency and Price List** ▾

Scan Barcode

Items

<input type="checkbox"/>	No.	Item Co...	Item Name *	No of Pc	Cutting ...	Quantit...	Rate (E...	Commis...	Unit Sal...	Amount ...	⚙
<input type="checkbox"/>	1	COM-00...	ALUMINIUM BUCKET			1	Br 10.00			Br 10.00	Edit

Add Multiple Add Row Download Upload

- After send for approval, Status changed from draft to ' Pending by Sales Manager'.
- Sales Manager will approve the Quotation and update ;If –Price is below an approved level

# Quotation Status details

**Test Lead** • Approved By Sales

AT Create Set as Lost < > Print ...

Sales Order  
Subscription

**Details** Address & Contact Terms More Info Connections

Quotation To \* Lead Date \* 31-10-2023 Order Type \* Sales

Lead \* CRM-LEAD-T/S-2023-00049 Valid Till 15-11-2023

Customer Name Test Lead

**Currency and Price List** ▾

Items

	No.	Item Co...	Item Name *	No of Pc	Cutting ...	Quantit...	Rate (E...	Commis...	Unit Sa...	Amount ...	
	1	COM-00...	ALUMINIUM BUCKET			1	Br 10.00			Br 10.00	Edit

Download

You edited this just now

You created this 12 minutes ago

- Once it is Updated by Sales Manager , Status will be changed to Approved b Sales.
- After approve ,We can create Sales Order by click on create button.
- Print option will be enable only when Quotation is approved.

# Quotation- Print Format



## AARTI Steel PLC

**Head Office-**AARTI Steel PLC, PECAN Building (Next to Ethio Ceramic Building) 4th Floor, Room No - 405, Gurd Shola Addis Ababa, Ethiopia  
**Factory Address-** Gelan city, Kora Road Kebele Tulu Guracha Oromia Ethiopia

### Quotation

Nikhil SP

Quotation No : SAL-QTN-2023-00049

Date : 31-10-2023

Dear Nikhil SP,

Thank you for your valuable inquiry. In response to our communication we hereby pleased to submit our standard offer as under.

Sr	Items	No. of Pcs	Cutting Length	Qty	Sale Price	Amount
1	PPGI EGA 500 0.25X1000-RAL 3000-MTR-FH: PPGI EGA 500 0.25X1000-RAL 3000-MTR	1000	2.1	2100.0 MTR	786.0	1,650,600.00
2	PPGI RIDGE COVER 0.32X330-RAL 3000-MTR-FH: PPGI RIDGE COVER 0.32X330-RAL 3000-MTR	500	4.1	2050.0 MTR	556.0	1,139,800.00
3	PPGI FLASHING 0.32X330-RAL 3000-MTR-FH: PPGI FLASHING 0.32X330-RAL 3000-MTR	200	4.8	960.0 MTR	586.0	562,560.00
Total				5110.0		3,352,960.00

**Total Amount Before Tax**

Br 2,915,617.39

Sales Order

# Sales Order – Details

Home > Selling > Sales Order > New Sales Order

Search or type a command (Ctrl + G) | Help | IS

## New Sales Order

Not Saved

Get Items From ... Save

**Details** | Address & Contact | Terms | More Info

Series \*  
SAL-ORD-.YYYY.-

Date \*  
31-10-2023

Customer's Purchase Order

Customer \*  
Priya

Delivery Date  
31-10-2023

Order Type \*  
Sales

Accounting Dimensions

Currency and Price List

**Items**

Scan Barcode | Set Source Warehouse

	No.	Item Code *	Delivery D...	No of Pc	Cutting Le...	Quantity *	Rate (ETB)	Commision	Unit Sale P...	Amount (E...	
<input type="checkbox"/>	1	ACC-0000	31-10-2023			1	Br 10.00			Br 10.00	Edit

Add Multiple | Add Row | Download | Upload

- Here you will redirect to the sales Order form.
- Sales person will check all the details and save .

# Sales orders — Address details

**New Sales Order** • Not Saved Get Items From ... Save

Details **Address & Contact** Terms More Info

**Billing Address**

Customer Address

Contact Person

Territory

**Shipping Address**

Shipping Address Name

Dispatch Address Name

**Company Address**

Company Address Name

Company Address

- Here we can add billing address or shipping address & contact details

# Sales Orders – Terms and Conditions

The screenshot shows a 'New Sales Order' form with the following sections:

- Navigation:** Selling > Sales Order > New Sales Order. Search bar: Search or type a command (Ctrl + G). Help icon.
- Header:** New Sales Order (Not Saved). Buttons: Get Items From, Save.
- Tabs:** Details, Address & Contact, **Terms** (highlighted with a red box), More Info.
- Payment Terms Section:**
  - Payment Terms Template: [Text area]
  - Payment Schedule Table:

<input type="checkbox"/>	No.	Payment Term	Description	Due Date *	Invoice Portion	Payment Amount (ETB) *	
<input type="checkbox"/>	1	Payment Term	Description	30-10-2023	100.000	10.00	Edit
  - Add Row button.
- Terms & Conditions Section:**
  - Terms: [Text area]
  - Terms and Conditions Details: [Rich text editor with toolbar: Normal, Bold, Italic, Underline, Link, Unlink, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Table].

- We can add terms & condntions .
- We can add payment terms .



# Sales Order– More Info (Sales Partner Commission details)

**New Sales Order** • Not Saved Get Items From ... Save

Details Address & Contact Terms **More Info**

**Status** ^

Status \* % Picked

Draft 0%

**Commission** ^

Sales Partner Amount Eligible for Commission

Br 8.70

Commission Rate

0.000

Total Commission

0.00

- In More Info tab Sales partner commission we can add.

# Sales orders — data records (Sales Team)

Selling > Sales Order > New Sales Order

Search or type a command (Ctrl + G) Help

Details Address & Contact Terms **More Info**

**Sales Team** ^

Sales Team

<input type="checkbox"/>	No.	Sales Person *	Contribution (%)	Contribution to Net Total	Commission Rate	Incentives	⊙
No Data							

Add Row

**Auto Repeat** ^

From Date

To Date

Auto Repeat

**Print Settings** ^

Letter Head

Print Heading

Group same items

Print Language

# Sales orders — data records (Sales Team)

☰ **New Sales Order** Not Saved Get Items From ... Save

Details Address & Contact Terms **More Info**

**Auto Repeat** ^

From Date  Auto Repeat

To Date

**Print Settings** ^

Letter Head  Print Heading

Group same items Print Language

**Additional Info** ^

Is Internal Customer Source

Campaign

# Sales order status – actions

The screenshot displays a sales order management interface. At the top left, the name 'Priya' is shown next to a 'Draft' status indicator. In the top right corner, there is a navigation bar with 'Get Items From', navigation arrows, and an 'Actions' dropdown menu. The main content area is divided into several sections: 'Details' (with sub-tabs for Address & Contact, Terms, More Info, and Connections), 'Customer' information (Priya, Date: 31-10-2023, Customer's Purchase Order), 'Order Type' (Sales, Delivery Date: 01-11-2023), 'Accounting Dimensions', and 'Currency and Price List'. Below these is the 'Items' section, which includes a table with columns for No., Item Co..., Delivery..., No of Pc, Cutting..., Quantit..., Rate (E..., Commis..., Unit Sal..., Amount..., and an Edit icon. The table contains one row with '1' in the 'No.' column, 'ACC-00' in the 'Item Co...' column, and '01-11-2...' in the 'Delivery...' column. At the bottom of the items table are buttons for 'Add Multiple', 'Add Row', 'Download', and 'Upload'. A green 'Saved' notification is visible in the bottom right corner. On the left side, there is a sidebar with options for 'Assigned To', 'Attachments', 'Shared With', and 'Tags', along with a 'FOLLOW' button and a list of recent actions.

- After save Sales Order, Status will be Draft.
- Action button will be enable also we can share ,Assign and attached the documents.

# Sales order– Actions

Selling > Sales Order > SAL-ORD-2023-00005

Search or type a command (Ctrl + G) Help IS

Priya • Draft

Assigned To

Attachments

Attach File +

Shared With

Tags

Add a tag ...

0 - 0 FOLLOW

You edited this 4 minutes ago

You created this 4 minutes ago

Details Address & Contact Terms More Info Connections

Customer \* Date \*  
Priya 31-10-2023

Order Type \* Delivery Date  
Sales 01-11-2023

Accounting Dimensions

Currency and Price List

Items

Scan Barcode Set Source Warehouse

	No.	Item Co...	Delivery...	No of Pc	Cutting ...	Quantit...	Rate (E...	Commis...	Unit Sal...	Amount ...	
	1	ACC-00	01-11-2...			1	Br 10.00			Br 10.00	Edit

Add Multiple Add Row Download Upload

Get Items From < > ... Actions

A → Submit

B → Send for Revise Rate

Customer's Purchase Order Help

A. IF you want revise the rate of items,for that you will have to click on “Send for revise Rate” Button.

B. Otherwise You can directly “Submit” Also.

# Sales Orders–submission

The screenshot shows a sales order submission interface. At the top, the breadcrumb navigation reads: Selling > Sales Order > SAL-ORD-2023-00003. A search bar contains the text "Search or type a command (Ctrl + G)". On the left sidebar, the user's name "Priya" is displayed next to a dropdown menu showing "Pending By Sales Manager", which is highlighted with a red box and labeled "A". Below this are sections for "Assigned To", "Attachments", "Shared With", and "Tags". The main content area has tabs for "Details", "Address & Contact", "Terms", "More Info", and "Connections". The "Details" tab is active, showing fields for "Customer" (Priya), "Date" (30-10-2023), "Order Type" (Sales), and "Delivery Date" (30-10-2023). Below these are sections for "Accounting Dimensions" and "Currency and Price List". The "Items" section contains a table with one row of data. At the top right of the main content area, there is a "Get Items From" dropdown, navigation arrows, and an "Actions" button. The "Submit" button within the "Actions" menu is highlighted with a red box and labeled "B".

No.	Item Co...	Delivery...	No of Pc	Cutting ...	Quantit...	Rate (E...	Commis...	Unit Sal...	Amount ...	
1	ACC-00	30-10-2...			1	Br 10.00			Br 10.00	Edit

A. After Sending for revise item, status changed to “Pending By Sales Manager”.

B. Once it is Approve from Sales manager, You can Submit the sales Order by Click on “Submit” Button.

# Advance payment / Full payment (Payment entry)

The screenshot shows a software interface for a sales order. The top navigation bar includes a menu icon, the name 'Priya', and a notification 'Sales order Submitted'. The main content area is divided into several sections: 'Details', 'Address & Contact', 'Terms', 'More Info', and 'Connections'. The 'Details' section shows the customer name 'Priya', the date '30-10-2023', and the order type 'Sales'. The 'Currency and Price List' section is expanded, showing a table of items. The table has columns for 'No.', 'Item Co...', 'Delivery...', 'No of Pc', 'Cutting ...', 'Quantit...', 'Rate (E...', and 'Commis...'. The first row shows '1' in the 'No.' column, 'ACC-00' in the 'Item Co...' column, '30-10-2...' in the 'Delivery...' column, and '1' in the 'Quantit...' column. The 'Rate (E...' column shows 'Br 10.00'. The 'Total Quantity' is '1' and the 'Total (ETB)' is 'Br 10.00'. The 'Net Total (ETB)' is 'Br 8.69565'. A dropdown menu is open from the 'Create' button, showing options: 'Pick List', 'Delivery Note', 'Work Order', 'Sales Invoice', 'Material Request', 'Request for Raw Materials', 'Purchase Order', 'Project', 'Subscription', 'Payment Request', and 'Payment'. The 'Payment' option is highlighted in a red box. The 'Update Items', 'Status', and 'Cancel' buttons are also highlighted in red boxes.

No.	Item Co...	Delivery...	No of Pc	Cutting ...	Quantit...	Rate (E...	Commis...
1	ACC-00	30-10-2...			1	Br 10.00	

- After Submit Sales order, Status will be changed to 'Sales Order Submitted'.
- Update Items, Status & create button will be enabled.
- If we have to do an advance payment, click on Payment.

# Payment Entry

☰ **New Payment Entry** Not Saved Save

**Type of Payment**

Series \* ACC-PAY-.YYYY.-

Posting Date \* 31-10-2023

Payment Type \* Receive

Mode of Payment

**Payment From / To**

Party Type Customer

Company Bank Account

Party Priya

Party Bank Account

Party Name Priya

Contact

**Accounts** ▾

**Amount**

Paid Amount (ETB) \* 10.00

- This is Payment Screen, Here we have to add Payment details.

# Payment entry — contd..

Accounting > Payment Entry > New Payment Entry

Search or type a command (Ctrl + G) Help v IS

### Reference

Get Outstanding Invoices

Get Outstanding Orders

Payment References

<input type="checkbox"/>	No.	Type *	Name *	Grand Total (ETB)	Outstanding (ETB)	Allocated (ETB)	
<input type="checkbox"/>	1	Sales Order	SAL-ORD-2023-00003	10	10	10	Edit

Add Row

### Writeoff

Total Allocated Amount (ETB)  
Br 10.00

Unallocated Amount (ETB)  
0.00

Difference Amount (ETB)  
Br 0.00

### Taxes and Charges

Advance Taxes and Charges

<input type="checkbox"/>	No.	Type *	Account Head *	Rate	Amount	Total	
 No Data							

- This is Payment Screen, Here we have to add Payment details.

# Payment entry– cheque reference

**Deductions or Loss** ▾

**Transaction ID**

Cheque/Reference No	Cheque/Reference Date
123456789	31-10-2023

**Accounting Dimensions** ▾

Project	Cost Center

**More Information** ▾

Status	Letter Head
Draft	Aartiafrica
<input type="checkbox"/> Custom Remarks	Print Heading

- Most important part is Cheque reference no.
- We can add cheque reference no. & then save it.

# Send payment entry for approval

**Priya** • Draft

Assigned To  
Attachments  
Attach File +  
Shared With  
Tags  
Add a tag ...  
0 · 0 FOLLOW  
You edited this just now  
You created this just now

**Type of Payment**

Payment Type \*  
Receive

Posting Date \*  
31-10-2023

Mode of Payment

**Payment From / To**

Party Type  
Customer

Company Bank Account

Party  
Priya

Party Bank Account

Party Name  
Priya

Contact

**Accounts** ▾

**Amount**

Paid Amount (ETB) \*  
10.00

Actions ▾  
Send For Approval  
Help

- After Save, Payment Entry, Action button will be enable.
- Sent it for approval.

# Payment Entry — status update

Accounting > Payment Entry > ACC-PAY-2023-00010

Search or type a command (Ctrl + G) Help IS

Priya Pending By Finance Department

Assigned To Attachments Attach File Shared With Tags Add a tag ...

0 · 0 FOLLOW

You edited this just now

You created this 7 minutes ago

**Type of Payment**

Payment Type \* Receive Posting Date \* 31-10-2023

Mode of Payment

**Payment From / To**

Party Type Customer Company Bank Account

Party Priya Party Bank Account

Party Name Priya Contact

**Accounts**

**Amount**

Paid Amount (ETB) \* 10.00

Actions

- Approve
- Reject
- Help

- Status will change to 'Pending By Finance Department'.
- It will be Approve by Accounts Department.

# Payment entry — approval

☰ **Priya** • Approved By Finance Department

Ledger Actions < > 🖨️ ... Cancel

Assigned To +

Attachments  
Attach File +

Shared With +

Tags  
Add a tag ...

0 · 0 FOLLOW

You edited this  
1 minute ago

You created this  
11 minutes ago

**Type of Payment**

Payment Type *	Posting Date *
Receive	31-10-2023

**Payment From / To**

Party  
Priya

Party Name  
Priya

**Accounts** ▾

**Amount**

Paid Amount (ETB) \*

Br 10.00

- After getting approval from Accounts department, Status will be 'Approved By Finance Department'.

# Sales Invoice

# Sales Invoice

The screenshot shows a software interface for managing sales orders. The breadcrumb navigation at the top reads: Selling > Sales Order > SAL-ORD-2023-00003. The user is logged in as Priya, and the status is 'Sales order Submitted'. A 'Create' dropdown menu is open, listing various document types: Pick List, Delivery Note, Work Order, Sales Invoice (highlighted with a red box), Material Request, Request for Raw Materials, Purchase Order, Project, Subscription, Payment Request, and Payment. The main form displays details for the sales order, including Customer (Priya), Date (30-10-2023), Order Type (Sales), and Delivery Date (30-10-2023). Below this is a 'Currency and Price List' section and an 'Items' table.

No.	Item Co...	Delivery...	No of Pc	Cutting ...	Quantit...	Rate (E...	Commis...
1	ACC-00	30-10-2...			1	Br 10.00	

- Sales Invoice has been created by sales user.

# Sales invoice

Accounting > Sales Invoice > New Sales Invoice

Search or type a command (Ctrl + G) Help v IS

**New Sales Invoice** • Not Saved

Fetch Timesheet Get Items From ... Save

Details Payments Contact & Address Terms More Info

Series \* ACC-SINV-.YYYY.-

Date \* 31-10-2023

Customer Priya

Posting Time 14:36:32

FS Number

Payment Due Date \* 31-10-2023

Include Payment (POS)

Is Return (Credit Note)

Is Rate Adjustment Entry (Debit Note)

Issue a debit note with 0 qty against an existing Sales Invoice

Edit Posting Date and Time

Accounting Dimensions v

Currency and Price List v

Items

Scan Barcode

Update Stock

Items

- Sales user will check all details of selling items and save it.

# Sales invoice contd..

Accounting > Sales Invoice > New Sales Invoice

Search or type a command (Ctrl + G) Help IS

**New Sales Invoice** Not Saved Fetch Timesheet Get Items From Save

**Details** Payments Contact & Address Terms More Info

Payment Due Date \*  
31-10-2023

Accounting Dimensions

Currency and Price List

**Items**

Scan Barcode

Update Stock

<input type="checkbox"/>	No.	Item	Quantity	Rate (ETB) *	Amount (ETB) *	<input type="checkbox"/>
<input type="checkbox"/>	1	ACC-00001: PRINTER TONER	1	Br 10.00	Br 10.00	Edit

Add Multiple Add Row Download Upload

Total Quantity: 1  
Total (ETB): Br 10.00

# Approval to finance department

Accounting > Sales Invoice > ACC-SINV-2023-00005

Search or type a command (Ctrl + G) Help IS

Priya • Draft

Fetch Timesheet Create Get Items From < > ... Actions

Send For Approval

Help

Assigned To

Attachments

Attach File +

Shared With

Tags

Add a tag ...

0 0 FOLLOW

You edited this just now

You created this just now

Details Payments Contact & Address Terms More Info Connections

Customer: Priya

Date \*: 31-10-2023

FS Number

Posting Time: 14:48:02

Payment Due Date \*: 31-10-2023

Include Payment (POS)

Is Return (Credit Note)

Is Rate Adjustment Entry (Debit Note)

Issue a debit note with 0 qty against an existing Sales Invoice

Edit Posting Date and Time

Accounting Dimensions

Currency and Price List

Items

Scan Barcode

Update Stock

- Sales user will send this invoice for approval to finance department.

# Finance approval

The screenshot displays a software interface for a user named 'Priya'. At the top left, the name 'Priya' is followed by a dropdown menu showing 'Pending By Finance Department', which is highlighted with a red box. To the right of this are buttons for 'Fetch Timesheet', 'Create', 'Get Items From', and 'Actions'. The 'Actions' dropdown menu is open, showing options: 'Approve' (highlighted with a red box), 'Reject', and 'Help'. The main content area is divided into tabs: 'Details', 'Payments', 'Contact & Address', 'Terms', 'More Info', and 'Connections'. The 'Details' tab is active, showing fields for 'Customer' (Priya), 'Date' (31-10-2023), 'FS Number', 'Posting Time' (14:50:10), and 'Payment Due Date' (31-10-2023). There are also checkboxes for 'Include Payment (P)', 'Is Return (Credit Note)', and 'Is Rate Adjustment Entry (Debit Note)'. A note below these checkboxes reads: 'Issue a debit note with 0 qty against an existing Sales Invoice'. On the left sidebar, there are sections for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Shared With', and 'Tags' (with an 'Add a tag ...' button). At the bottom left, there are social media-style icons for likes and comments, and a 'FOLLOW' button. A notification at the bottom left states 'You edited this 4 minutes ago'.

- Finance will check advance & partial payments .
- If full payment will paid, Finance will approve.

# Sales delivery

Accounting > Sales Invoice > ACC-SINV-2023-00005

Search or type a command (Ctrl + G) Help v IS

Priya • Approved By Finance Department

View Create < > Print ... Cancel

Payment  
Return / Credit Note  
**Delivery**  
Payment Request  
Invoice Discounting  
Maintenance Schedule  
Subscription

Assigned To  
Attachments  
Shared With  
Tags

Details Payments Contact & Address Terms More Info Connections

Customer: Priya  
Date\*: 31-10-2023  
Posting Time: 14:56:10  
Payment Due Date\*: 31-10-2023

Currency and Price List

Items  
Update Stock

- Dispatch person will create delivery note from sales invoice.

# Sales invoice

Home > Stock > Delivery Note > New Delivery Note

Search or type a command (Ctrl + G) Help v IS

**New Delivery Note** • Not Saved Get Items From ... **Save**

**Details** Address & Contact Terms More Info

Series \* MAT-DN-.YYYY.- Date \* 31-10-2023  Is Return

Customer \* Priya Posting Time \* 14:58:24

FS Number  Edit Posting Date and Time

Accounting Dimensions v

Currency and Price List v

**Items**

Scan Barcode Set Source Warehouse

Delivery Note Item

<input type="checkbox"/>	No.	Item Code *	Quantity *	UOM *	Rate (ETB)	Amount (ETB)	<input type="checkbox"/>
<input type="checkbox"/>	1	ACC-00001: PRINTER TONEI	1	Nos	Br 10.00	Br 10.00	<input type="checkbox"/> Edit

Add Multiple Add Row Download Upload

# Delivery status update

> Stock > Delivery Note > MAT-DN-2023-00001

Search or type a command (Ctrl + G) Help IS

**Priya** - Draft

Create Get Items From < > ... **Submit**

Submit this document to confirm

Assigned To

Attachments

Attach File +

Shared With

Tags

Add a tag ...

0 · 0 FOLLOW

You edited this just now

**Details** Address & Contact Terms More Info Connections

Customer \* Priya Date \* 31-10-2023 Is Return

FS Number 12346 Posting Time \* 15:00:51

Edit Posting Date and Time

**Accounting Dimensions** ▾

**Currency and Price List** ▾

- After creating delivery note, dispatch person will create bill from ERIKA Portal & update FS no.

Thank You



Our strength is our commitment to excellence.