

# Order Management System

Presented By

**PSM SOFTTECH PVT. LTD.**





# About Us

**WE HAVE BEEN DEDICATED TO PROVIDING EXCEPTIONAL BUSINESS SOLUTIONS FOR THE PAST 17 YEARS, CONTINUALLY STRIVING FOR IMPROVEMENT AND INNOVATION.**



PSM SoftTech Pvt Ltd is an IT software company that was Established in 2007, which is a Full-fledged leading Development & Design expert company providing superior Software Solutions, Web Based Solutions, Web Application Solutions, SMS Broadcasting, Web Hosting Solutions, Creative Designing solutions and services to companies globally.

PSM SoftTech has made its mark as a well established company driven by the industry's most qualified professional and trained individuals and is surely headed in becoming a leading organization which facilitates, enhances and provides measurable business value to customers through most effective uses of technology and Resources to organizations globally. Our goal is to exceed our customer's expectations in the form of value, quality and complete customer satisfaction.

# Our Major products

**MumbaiCRM**

Lead Management System

**MumbaiCRM**

Complaint Management System

**OMS**

ORDER MANAGEMENT SOFTWARE



**Inventory Management System**



**RadeNext**

A Complete ERP Solution



**RADE**

**ACCOUNT & BILLING SOFTWARE**

**PATHSHALA**

**SCHOOL MANAGEMENT SYSTEM**

**ASSET MANAGEMENT SYSTEM**



# Valuable Customers

We proudly serve over 10,000 customers across retail, wholesale, and corporate sectors, delivering tailored solutions to meet diverse needs.







ORDER MANAGEMENT  SOFTWARE

## Modern Seamless Order Tracking

Order management software tracks orders from inception to delivery, manages and processes the data connected to the order as it moves through its lifecycle. It is designed to facilitate and automate the order fulfillment process, reducing the time in the order-to-cash cycle and improving order processing efficiency for suppliers and wholesalers.



## Why OMS?

As customer expectations and product demands evolve, merchants must adapt swiftly to deliver a seamless and satisfying customer experience while maintaining cost efficiency. With customers now driving the buying journey, businesses need to align themselves with these changes to stay competitive. One essential tool in achieving this alignment is an Order Management System (OMS), which offers significant benefits tailored to meet the demands of today's market.

Despite the numerous advantages of an OMS, such as those offered by PSM SoftTech, many merchants still overlook the importance of digitalizing their order management process. Whether you're a small business operating two stores or a large, multibillion-dollar enterprise, implementing a robust OMS is critical for sustaining growth and profitability in a fast-paced digital economy.

- Seamless Order Management
- Centralized Service
- Order Approval System
- Order Control with Limit (Monthly, Yearly)
- Global Inventory

### Available on:



Web Portal



Android Mobile Application



IOS Mobile Application



## Problem Analysis

<b>COMMUNICATION GAP</b>	Contacting vendor over calls and mail is quite difficult. Connecting through a single portal makes work easy
<b>CONTRACTUAL LIMITATIONS &amp; APPROVAL</b>	Limiting order and approved by manager makes task management seamless
<b>ORDER FOLLOW-UP &amp; TRACKING</b>	Track your order and its shipping details by your mail and dashboard.
<b>REAL-TIME NOTIFICATION</b>	Receive notification on every action from generating order till receiving.
<b>BRANCH/ DEPARTMENT MANAGEMENT</b>	Interpret the results and Multiple location order management. Record maintenance for all departments and branches.
<b>MIS (MANAGEMENT INFORMATION SYSTEM) REPORTS.</b>	Management reports with detailed knowledge .

# What is an order management system (OMS)?

An order management system (OMS) is a system designed to streamline, manage, and track orders throughout the fulfillment process. An OMS also provides real-time order status information, from the point-of-sale to last-mile delivery

## Order tracking

Providing real-time order tracking not only helps build trust, but it also helps to reduce the amount of customer service inquiries related to order and shipment status, freeing up your team's time to focus on other more pressing issues.

## Manage inventory

A good OMS will record and collect historical order data that you can use to better manage your inventory. With this type of data, you can easily pull reports on trends and seasonality, so you can more accurately forecast demand.

## Order fulfillment

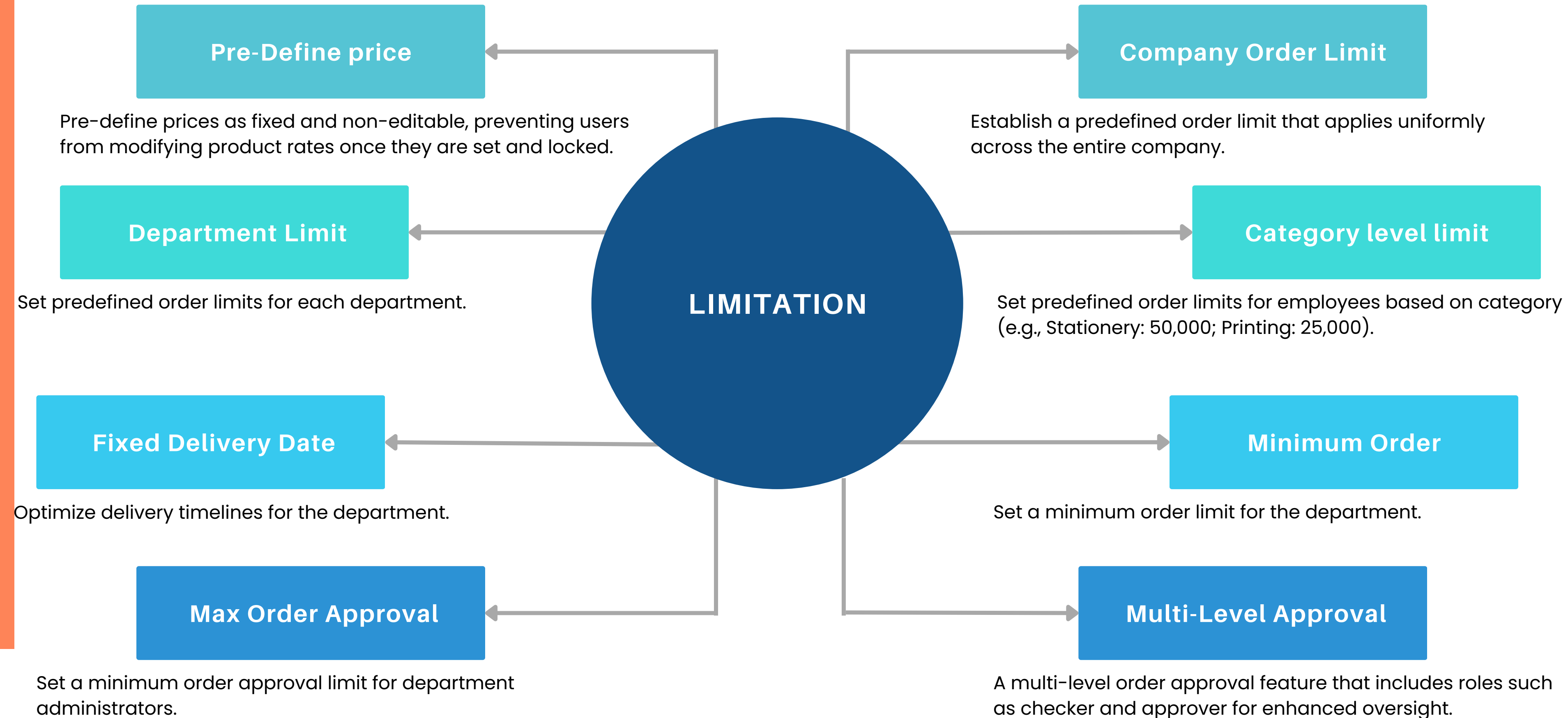
Most systems offer a two way sync to make sure order information is passed between your order management system and your ecommerce platform (and/or fulfillment software) while providing you with visibility into the entire process.



# Order Process



# LIMITS AND PRICES





# Approval Process

## EMPLOYEE CREATES ORDER

Employee of any departments can create fro their own use.  
This order will be further Approved by its Department Manager and Then corporate Manager

## CORPORATE ADMIN AUTHORIZATION

Corporate admin can authorize all the order for same company's all departments. This user can all check which employee from any department has created order. However ordered approved by Corporate admin are final.



## DEPARTMENT ADMIN AUTHORIZATION

Department admin can control departments assigned to him. He can also authorize and approve complete order till certain level if it is set.

## DISPATCH BY VENDOR

On order is approved by corporate order will be displayed on Vendor's Dashboard. Which Vendor dispatches to the employee.



## FRANCHISE

Franchise which handles order where vendor doesn't have his own branch



## BRANCH

Branch head who operates orders in the region.



## EMPLOYEE

Creates order on ground level



## DEPARTMENT

Department Manager who can manage his own departments



## CORPORATE

Company Manager who has rights to authorize any order for whole company

# User Details

# Create New Order

[Dashboard](#) [Order now](#) [Printing](#) [★ Favourite](#) [My Products](#) [Authorization](#) [Reports](#) [Help](#)

ORDER NOW

[Check Out](#) [Back To Home](#)

ANDHERI - WEST, MUMBAI (Tier4)  
Your Department Under City

100  
Minimum Order Value

1  
Delivery At Your Department(Days)

₹0.00

Grid View

Image View

0.0001  
  
0.5MM POLYCAB FLAXEABLE CABLE NEW  
(GEN)  
Rate: 50  
- 1 +  
Add To Cart

1002  
  
1 MM FEXIBEL WIRE ( 90 MTR BUN )  
(GEN)  
Rate: 60  
- 1 +  
Add To Cart

1.0005  
  
1.5 MM POLICAB WIRE ( 90 MTR BUN )  
(GEN)  
Rate: 80  
- 1 +  
Add To Cart

1003  
  
1.5 MM POLICAB WIRE (200 MTR BUN )  
(GEN)  
Rate: 65  
- 1 +  
Add To Cart

1004  
  
1004

1005  
  
1005

1/0001  
  
No image  
available

A/0022  
  
Activate Windows  
Go to Settings to activate Windows.  
No image  
available

All corporate users can place orders by navigating to the "Order Now" page, which provides a comprehensive list of assigned products. Depending on administrator settings, this menu can be hidden for certain users, allowing for customized access.



# Filters Applicable

Dashboard

Order now

Printing

Favourite

My Products

Authorization

Reports

Help

ORDER NOW

search you

ANDHERI - WEST, MUMBAI (Tier4)

Your Department Under City

100

Minimum Order Value

1

Delivery Days

Grid View

Ima

ID	Code	Name	Company	Category	MRP	Un
6135	0.0001	0.5MM POLYCAB FLAXEBLE CABLE NEW	GEN	GEN	200	PCS
6133	1002	1 MM FEXIBEL WIRE ( 90 MTR BUN )	GEN	GEN	0	BU
6132	10001	1 MM POLYCAB WIRE (90 MTR BUN )	GEN	GEN	0	BU
6130	1.0005	1.5 MM POLICAB WIRE ( 90 MTR BUN )	GEN	GEN	0	BU
6129	1003	1.5 MM POLICAB WIRE (200 MTR BUN )	GEN	GEN	0	BU
6128	1004	1.5 MM POLYCAB WIRE (300 MTR BUN )	GEN	GEN	0	BU
6126	1.0001	1.5MM 3CORE WIRW POLYCAB	GEN	GEN	0	BU
6125	1005	1.5MM FEXIBEL WIRE ( 90 MTR BUN )	GEN	GEN	0	BU
6124	1.0004	1.5MM POLYCAB FLAXEBLE CABLE	GEN	GEN	0	mtr
6123	1/0001	1/4 RIGID FILE THIN	GEN	GEN	0	PCS
6023	1018	A/3 BLACK PRINT	GEN	GEN	0	PCS
6021	1019	A/3 COLUER PRINT	GEN	GEN	0	PCS

Select Favourite

<--Select-->

Select Department

ANDHERI - WEST, MUMBAI

<--Select-->

ANDHERI - WEST, MUMBAI

Delhi

FORT,MUMBAI

Malad

Nasik

Pune

Select Category

<--Select-->

Filter

Wallet Balance: 265019

Category	Limit	Sales	Balance
CANDEL	50000	0	50000
MOOP	25000	0	25000
PENCIL	10000	0	10000
GENARAL	8000	0	8000
GEN	90000	981	89019
Sports Shoes	8000	0	8000
PLASTIC	75000	0	75000
Total	266000	981	265019

Primary Department View & Filters: The "Order Now" page displays products associated with the user's primary department by default. Users can filter products by other departments, favorites, product categories, and companies. Additionally, they can review limitations such as minimum order limits to ensure compliance with corporate policies.

# Checkout

Dashboard

Order now

Printing

Favourite

My Products

Authorization

Reports

Help

ORDER CONFIRMATION - YOUR SELECTED PRODUCT LIST

Back to shopping

ID	Code	Name	Company	Category	MRP	Our Rate	Ord Qty	Unit	Update	Delete
730	6133	1 MM FEXIBEL WIRE ( 90 MTR BUN )	GEN	GEN	0	60	<input type="text" value="3"/>	BUN		
731	6130	1.5 MM POLICAB WIRE ( 90 MTR BUN )	GEN	GEN	0	80	<input type="text" value="3"/>	BUN		
732	6129	1.5 MM POLICAB WIRE (200 MTR BUN )	GEN	GEN	0	65	<input type="text" value="3"/>	BUN		
733	6128	1.5 MM POLYCAB WIRE (300 MTR BUN )	GEN	GEN	0	79	<input type="text" value="4"/>	BUN		
737	6135	0.5MM POLYCAB FLAXEABLE CABLE NEW	GEN	GEN	200	50	<input type="text" value="1"/>	mtr		

Select Department:

ANDHERI - WEST, MUMBAI

Delivery Address

ANDHERI,ANDHERI (W),MUMBAI,27-Maharashtra-

Remark

Taxable Value

GST Amount

Grand Total

₹981.00

₹176.58

₹1157.58

Send for approval

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Cart and Checkout: Once products are added to the cart, users can review all items, adjust quantities, and make changes before submitting the order for approval. If allowed by the administrator, users can also update the shipping address, add remarks, and check all calculations for accuracy before placing the order. This thorough process ensures that orders are precise, meet all requirements, and are ready for swift approval and fulfillment.

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WE BUILD YOUR CONCEPT





# Email Notification For Approval

The screenshot shows a Gmail interface with an email from ZEE STUDIOS LIMITED. The email content includes a request for approval for an order, followed by a table of order details and a delivery address. At the bottom, there are three buttons: 'Approve', 'Disapprove', and 'Partial Approval', along with the RADE logo.

Dear Pradeep

ZEE STUDIOS LIMITED

I have request this order for approval.

---

Order No.: 457 Date : 17/09/2024

---

Emp Name: Pradeep(emppsm)

---

Department: ANDHERI - WEST, MUMBAI

---

Order Amount: 189.98

Order No	Date	Department	Employee	Item	Qty	Unit	Rate	Value
457	17-09-2024	ANDHERI - WEST, MUMBAI	Pradeep	1.5 MM POLICAB WIRE ( 90 MTR BUN )	1	BUN	80	80
457	17-09-2024	ANDHERI - WEST, MUMBAI	Pradeep	1.5 MM POLICAB WIRE (200 MTR BUN )	1	BUN	65	65
457	17-09-2024	ANDHERI - WEST, MUMBAI	Pradeep	1.5MM FEXIBEL WIRE ( 90 MTR BUN )	1	BUN	16	16


Delivery Address : ANDHERI,ANDHERI (W),MUMBAI,27-Maharashtra-

Seeking for your approval as soon as possible.

Click Here To Approve [Approve](#)

\*\*\*

[Approve](#) [Disapprove](#) [Partial Approval](#)



# Admin Order Approval Page

mahindra FINANCE

0

0

1

1

Corporate

Dashboard

Order now

Printing

Favourite

My Products

Authorization

Reports

Help

ORDER DETAILS

ApproveBack

Order No :169

Order Date:06/04/2023

Order By:E001

Emp Name :Priya Singh

Department:ANDHERI - WEST, MUMBAI

Remarks:

Min Order:100

Order Approval Limit:5000

Approval Level:2

Approved by (level-1):

Approved On:

Total Qty.:14

Net Total:824

GST Amount:148.32

Total Amount:972.32

Approve	Hold	Cancel	ID	EmpID	Emp Name	Department	CODE	NAME	QTY	APPROVE	QTY	SRATE	GST(%)	TAX	TOTAL
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	542	E001	Priya Singh	ANDHERI - WEST, MUMBAI	6133	1 MM FEXIBEL WIRE ( 90 MTR BUN )	3	3		60	18	32.4	212.4
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	543	E001	Priya Singh	ANDHERI - WEST, MUMBAI	6130	1.5 MM POLICAB WIRE ( 90 MTR BUN )	4	4		80	18	57.6	377.6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	544	E001	Priya Singh	ANDHERI - WEST, MUMBAI	6129	1.5 MM POLICAB WIRE (200 MTR BUN )	2	2		65	18	23.4	153.4
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	545	E001	Priya Singh	ANDHERI - WEST, MUMBAI	6128	1.5 MM POLYCAB WIRE (300 MTR BUN )	2	2		79	18	28.44	186.44
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	546	E001	Priya Singh	ANDHERI - WEST, MUMBAI	6126	1.5MM 3CORE WIRW POLYCAB	3	3		12	18	6.48	42.48

The order can Approve / Hold / Cancel

Activate Windows  
Go to Settings to activate Windows.

# Report for Admin

☰

🔍

STAR ENTERPRISES

Everything And More

0

0

0

0

Corporate

Dashboard

Order now

Printing

Favourite

My Products

Authorization

Reports

Help

LIST OF INQUIRY

From Date

13/01/2023

Upto Date

13/01/2023

INQ No	INQ Date	Corporate	Department	Employee	Status	View
--------	----------	-----------	------------	----------	--------	------

Inquiry List

Orders

Pending challan for accept

Delivered Challan List

MIS Reports

Customized Reports

Category wise orders

Product wise orders

Department wise orders

List Of Invoice

Pending Order List

Approved Order List

Hold Order List

Cancel Order List

All Orders

Export To Excel

Activate Windows

Go to Settings to activate Windows.

Activate Windows



# Monthly Department Wise Report

mahindra FINANCE												
Dashboard Order now Printing Favourite My Products Authorization Reports Help												
CATEGORY WISE ORDERS												
Year 2023 Category <--Select--> Based On Values View												
Department	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
ANDHERI - WEST, MUMBAI	15222									890		80420
Delhi										300		
FORT,MUMBAI	1221											
Malad										1041		
Nasik	4128									247		
Pune	6000									435		
Total	26,571.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,913.00	0.00	80,420.00

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Activate Windows  
Go to Settings to activate Windows

# Monthly Product Wise Report

mahindra FINANCE													
Dashboard Order now Printing Favourite My Products Authorization Reports Help													
DEPARTMENT WISE ORDERS													
Year 2023 Department <--Select--> Based On Values View													
Items	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
0.5MM POLYCAB FLAXEABLE CABLE	50									50		150	
1 MM FEXIBEL WIRE ( 90 MTR BUN )	1740									660		240	
1 MM POLYCAB WIRE (90 MTR BUN )	120									45		30	
1.5 MM POLICAB WIRE ( 90 MTR BUN )	1200									880			
1.5 MM POLICAB WIRE (200 MTR BUN )	585									715			
1.5 MM POLYCAB WIRE (300 MTR BUN )	869									316			
1.5MM 3CORE WIRW POLYCAB	144									48			
1.5MM FEXIBEL WIRE ( 90 MTR BUN )	128									64			
1.5MM POLYCAB FLAXEABLE CABLE	315									135			
A/3 BLACK PRINT	3420												
Asic Sports shoes	12000											80000	
Bata Formal Shoes	6000												
Total	26,571.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,913.00	0.00	80,420.00	
Copyright © 2020 PSM SoftTech Pvt. Ltd.													
Activate Windows Go to Settings to activate Windows													

# Department & Product Wise Report

<



# List of Enquiry

<div><div><div></div><div></div><div></div></div><div><div>STAR ENTERPRISES</div><div>Everything And More</div></div><div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div><div>Corporate</div></div>								
<div><div>Dashboard</div><div>Order now</div><div>Printing</div><div>Favourite</div><div>My Products</div><div>Authorization</div><div>Reports</div><div>Help</div></div>								
<div><div>LIST OF INQUIRY</div><div>Export To Excel</div></div>								
<div>From Date</div> <div>13/01/2022</div>			<div>Upto Date</div> <div>13/01/2023</div>		<div>Department</div> <div>ANDHERI - WEST, MUMBAI</div>		<div>Filter</div>	
INQ No	INQ Date	Corporate	Department	EmpID	Emp Name	Total Items	Values	View
9	17/08/2022	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	1080	Priya Singh	14	0	View
8	17/08/2022	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	1080	Priya Singh	3	0	View
7	17/08/2022	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	1080	Priya Singh	1	0	View
6	17/08/2022	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	1080	Priya Singh	20	0	View
5	17/08/2022	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	1080	Priya Singh	6	0	View
4	19/06/2022	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	1080	Priya Singh	4	0	View
3	19/06/2022	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	1080	Priya Singh	4	0	View
2	15/06/2022	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	1080	Priya Singh	5	0	View
1	15/06/2022	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	1080	Priya Singh	5	0	View

Activate Windows  
Go to Settings to activate Windows.



# MIS Reports

Dashboard

Order now

Printing

Favourite

My Products

Authorization

Reports

Help

MIS REPORT WITH GST

Export To Excel

From Date

11/04/2023

Upto Date

11/04/2023

Filter

☒ Show All Orders

☐ Skip Repeat Columns

ZEE STUDIOS LIMITED

Branch Name	States	Order No	Ordered Date	Department Name	Cost Center	Sr	Product Name	Qty	Unit	Rate	Total	HSN	GST(%)	CGST	SGST	IGST	NET TOTAL AMOUNT	Status	
	27-Maharashtra	173	11/04/2023	ANDHERI - WEST, MUMBAI	12520	562	1.5 MM POLICAB WIRE ( 90 MTR BUN )	5	BUN	80	400	8544	18	0	0	72	472	1038.4	Awaiting Approvel
	27-Maharashtra	173	11/04/2023	ANDHERI - WEST, MUMBAI	12520	561	1 MM FEXIBEL WIRE ( 90 MTR BUN )	8	BUN	60	480	8544	18	0	0	86.4	566.4	1038.4	Awaiting Approvel
	27-Maharashtra	172	11/04/2023	ANDHERI - WEST, MUMBAI	12520	556	1 MM FEXIBEL WIRE ( 90 MTR BUN )	3	BUN	60	180	8544	18	0	0	32.4	212.4	1013.62	Awaiting Approvel
	27-Maharashtra	172	11/04/2023	ANDHERI - WEST, MUMBAI	12520	557	1 MM POLYCAB WIRE (90 MTR BUN )	3	BUN	15	45	8544	18	0	0	8.1	53.1	1013.62	Awaiting Approvel
	27-Maharashtra	172	11/04/2023	ANDHERI - WEST, MUMBAI	12520	558	1.5 MM POLYCAB WIRE (300	4	BUN	79	316	8544	18	0	0	56.88	372.88	1013.62	Awaiting Approvel

# DASHBOARD (Employee)

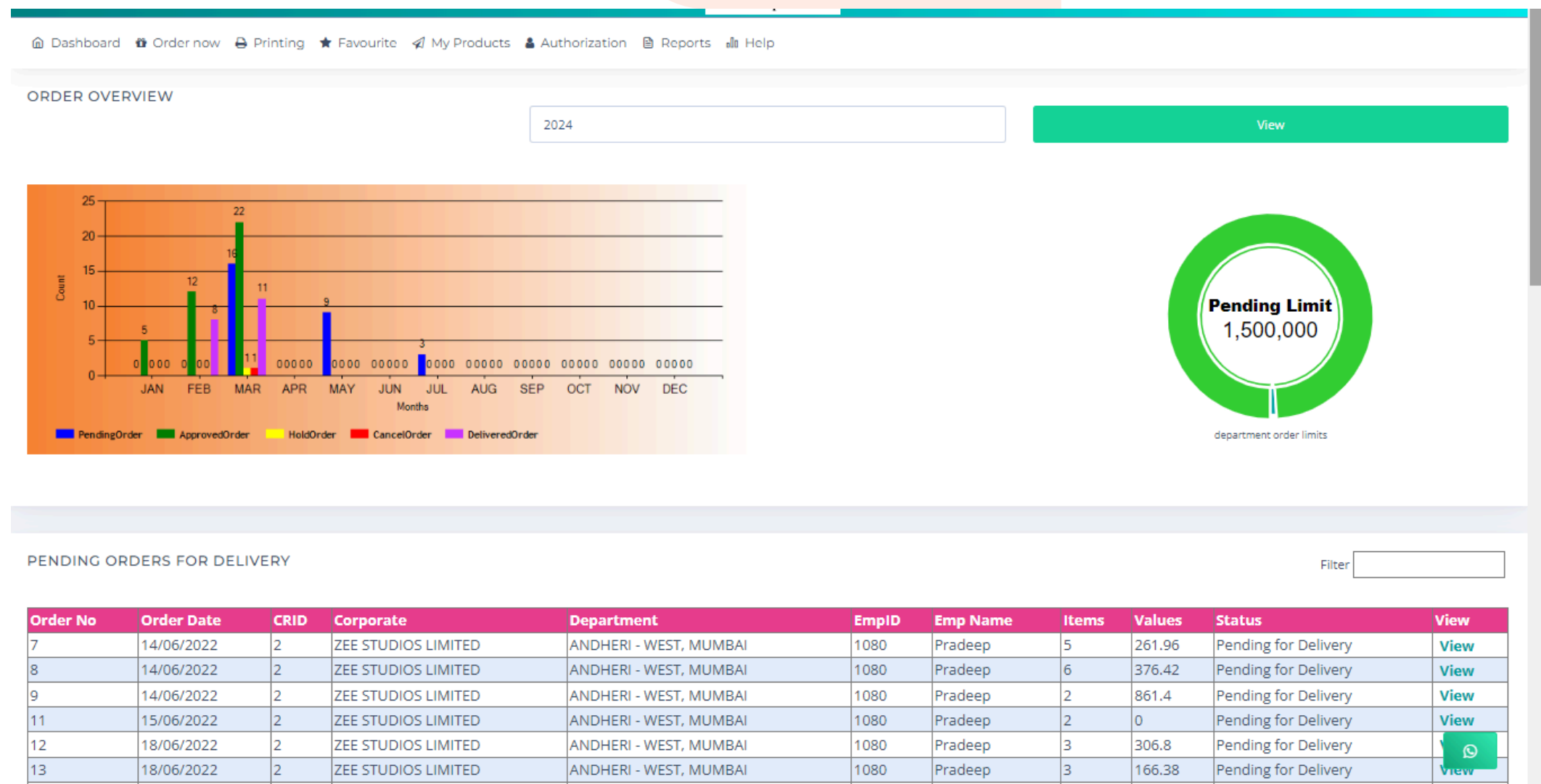
1)Employee ( Requester) : Responsible for creating orders based on their department's requirements

Dashboard Description

a)Order Overview: The dashboard features a bar chart displaying the number of orders generated by the Employee each month, alongside the number of authorized orders.

b)PIE Chart: A PIE chart shows the total amount of all generated orders, offering a quick visual summary of the overall n spending.

c)Pending Authorizations: A list is available where the Employee can view orders that are still pending authorization.

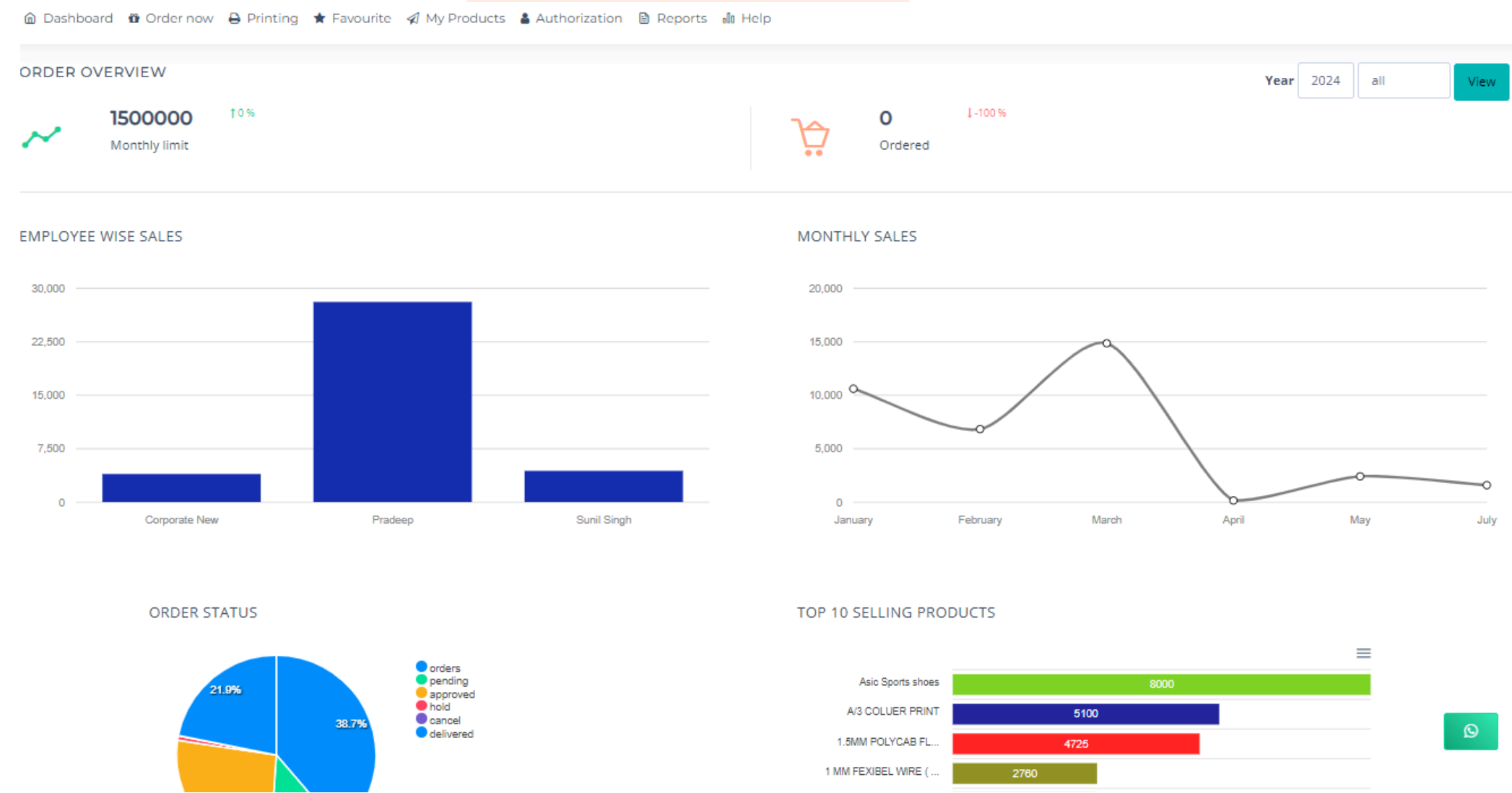


# DASHBOARD (Department admin)

**Department Admin (1st Approval):** This role authorizes orders at the primary level. A Department Admin can oversee multiple departments and authorize all orders created by Employees within those departments.

The Department dashboard displays information on orders generated by Employees across all departments mapped to the Department Admin:

- Bar Chart: Shows the amount of orders generated by each department.
- Line Chart: Illustrates the total monthly orders for detailed analysis.
- Analytical Charts: Provide insights similar to those available to Employees, allowing the Department Admin to analyze all orders within their departments.



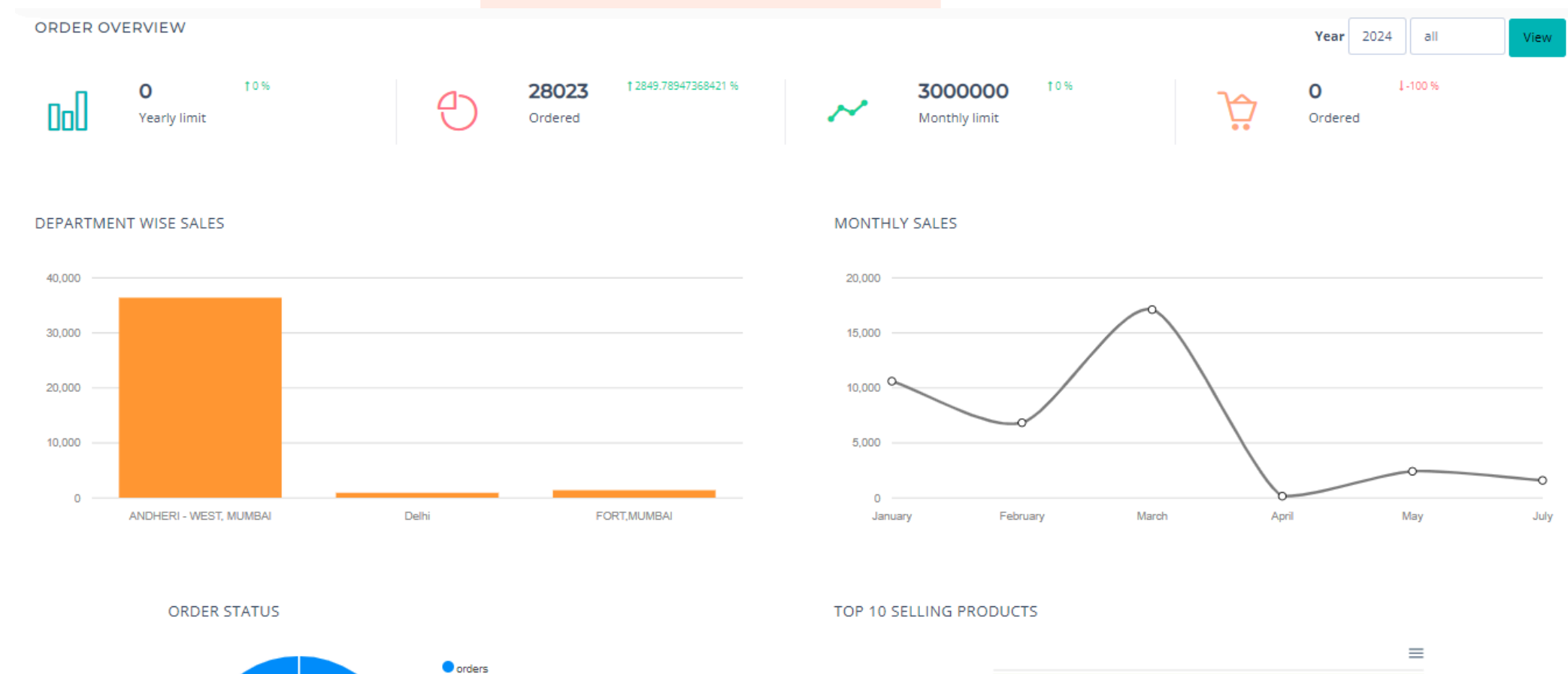


# DASHBOARD (Corporate admin)

**The Corporate Admin** holds the highest authority, overseeing all departments with the power to approve and authorize orders beyond the limits of Department Admins, while certain user permissions are still defined by the software administrators.

The Corporate dashboard offers more detailed insights compared to the Department Admin dashboard:

- a) Detailed Bar Graph: Provides a more comprehensive view of orders across the entire corporation.
- b) Corporate Limitations: All limitations set for the entire corporation are visible here.
- c) Order Overview: You can check the total number of orders generated and the total amount of orders created.
- d) Monthly Transactions: All monthly transactions can be reviewed in this section



# Favourite List

Previously, we mentioned the ability to filter products by favorite. Here's how users can create and manage their Favorite Lists:

- Accessing Favorite: Users can navigate to the "Favorite" option to view any previously created lists.
- Creating a New List: To create a new Favorite List, users click the "NEW" button, enter a list name, and then select "Add Products." Multiple products can be chosen from the list and added to the new List. Once the "Save" button is clicked, the list is created.
- Editing the List: Users can easily edit their Favorite Lists, adding or deleting products as needed to keep the list current and relevant for their ordering needs.

Dashboard
Order now
Printing
★ Favourite
My Products
Authorization
Reports
Help

MY FAVOURITE LIST
New
Export To Excel

Search
Filter

ID	Name	CreatedBy	Quantity	Action
34	Pradeep	Pradeep	5	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
14	Daily Need Items	Pradeep	4	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
5	Reg. Items	Pradeep	4	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

Favourite Name\*
123
Selection
☒ Only For Me
☐ For All
Add Product

ADD PRODUCT

Select Company
<--Select-->
Select Category
<--Select-->
Search Product
Filter
Add
Clear

ID	Code	Name	Company	Category
<input type="checkbox"/> 6135	0.0001	0.5MM POLYCAB FLAXEABLE CABLE NEW	GEN	GEN
<input type="checkbox"/> 6133	1002	1 MM FEXIBEL WIRE ( 90 MTR BUN )	GEN	GEN
<input type="checkbox"/> 6132	10001	1 MM POLYCAB WIRE (90 MTR BUN )	GEN	GEN
<input type="checkbox"/> 6130	1.0005	1.5 MM POLICAB WIRE ( 90 MTR BUN )	GEN	GEN
<input type="checkbox"/> 6129	1003	1.5 MM POLICAB WIRE (200 MTR BUN )	GEN	GEN
<input type="checkbox"/> 6128	1004	1.5 MM POLYCAB WIRE (300 MTR BUN )	GEN	GEN
<input type="checkbox"/> 6126	1.0001	1.5MM 3CORE WIRW POLYCAB	GEN	GEN
<input type="checkbox"/> 6125	1005	1.5MM FEXIBEL WIRE ( 90 MTR BUN )	GEN	GEN
<input type="checkbox"/> 6124	1.0004	1.5MM POLYCAB FLAXEABLE CABLE	GEN	GEN
<input type="checkbox"/> 6123	1/0001	1/4 RIGID FILE THIN	GEN	GEN
<input type="checkbox"/> 6023	1018	A/3 BLACK PRINT	GEN	GEN
<input type="checkbox"/> 6021	1019	A/3 COLUER PRINT	GEN	GEN
<input type="checkbox"/> 6137	Shoe0002	Asic Sports shoes	Asics	Sports Shoes

# My Product

If a user needs a product that is not on the assigned list and wants to request its addition, they can create an inquiry for the product:

- **Creating an Inquiry:** Navigate to the "My Product" option, where users can view and select products to add to the cart. These products are then sent for inquiry.
- **Adding Details:** Users can write remarks and reasons for the inquiry in the provided text box. This helps in detailing the request and providing context.
- **Sending Inquiry:** After completing the inquiry details, users send the request for a quotation. The inquiry can be tracked and reviewed in the Inquiry List to monitor its status and follow up as needed.

MY PRODUCT CATALOG

Send enquiry

Export To Excel

Select Company: <--Select-->

Select Category: <--Select-->

Search

Filter

5

ID	Code	Name	Company	Category	Unit	HSN	GST(%)	Is Assigned	Qty	Add to Cart	Image
6148	34234	Pradeep Mishra	Allen Solly	abc	PCS		5	Unassigned	1		No image available
6147	1	Shoes	Allen Solly	Shoes	PCS		10	Unassigned	1		No image available
6146	PR002	PRODUCT	GENERAL	GENARAL	PCS	0000	5	Unassigned	1		No image available
6145	001	Visiting Card	GEN	GENARAL	PCS		18	Assigned	1		
6144	0002	Visiting Card	GENERAL	GENARAL	PCS		0	Assigned	1		No image available
6143	Code0001	Water Bottles 250ml	DOLPHIN	Bottle	BOX		18	Unassigned	1		No image available
6142	1MOP	mop	GEN	abc	PCS	1254	18	Unassigned	1		

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INQUIRY FOR QUOTATION

Send Inquiry for quotation

Back

add if product not exist in catalog

Remarks

5

ID	Pdid	Corporate Name	Department	Employee Name	Employee Code	Item Name	Qty	Action
108	6148	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	Pradeep	E001	Pradeep Mishra	1	
109	6147	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	Pradeep	E001	Shoes	1	
110	6146	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	Pradeep	E001	PRODUCT	1	
111	6145	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	Pradeep	E001	Visiting Card	1	
112	6143	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	Pradeep	E001	Water Bottles 250ml	1	

# Reports

All corporate logins have access to common reports, including:

**Inquiry List:** Tracks all product inquiries made by users.

**Order Lists:**

1. **Pending Order List:** Displays orders that have been submitted but are awaiting authorization.

2. **Approved Order List:** Shows orders that have been authorized and are ready for processing or have been processed.

3. **Hold Order List:** Lists orders that are temporarily on hold, pending for further authorization.

4. **Canceled Order List:** Contains orders that have been canceled or rejected.

5. **All Order List:** A comprehensive list of all orders, regardless of their status.

**Delivered Challan List:** Provides a detailed report of all delivered orders, including their associated delivery challans, ensuring traceability and confirmation of receipt.

Dashboard
Order now
Printing
Favourite
My Products
Authorization
Reports
Help

ORDER NOW

search your product
Check Out
Back To Home

ANDHERI - WEST, MUMBAI (Tier4)

100

1

5

Your Department Under City
Minimum Order Value
Delivery Days
₹1157.58

Grid View
Image View

ID	Code	Name	Company	Category	MRP	Unit	Rate	Qty	Action
6135	0.0001	0.5MM POLYCAB FLAXEABLE CABLE NEW	GEN	GEN	200	PCS	50	1	
6133	1002	1 MM FEXIBEL WIRE ( 90 MTR BUN )	GEN	GEN	0	BUN	60	1	
6132	10001	1 MM POLYCAB WIRE (90 MTR BUN )	GEN	GEN	0	BUN	15	1	
6130	1.0005	1.5 MM POLICAB WIRE ( 90 MTR BUN )	GEN	GEN	0	BUN	80	1	
6129	1003	1.5 MM POLICAB WIRE (200 MTR BUN )	GEN	GEN	0	BUN	65	1	
6128	1004	1.5 MM POLYCAB WIRE (300 MTR BUN )	GEN	GEN	0	BUN	79	1	
6126	1.0001	1.5MM 3CORE WIRW POLYCAB	GEN	GEN	0	BUN	12	1	
6125	1005	1.5MM FEXIBEL WIRE ( 90 MTR BUN )	GEN	GEN	0	BUN	16	1	
6124	1.0004	1.5MM POLYCAB FLAXEABLE CABLE	GEN	GEN	0	mtr	45	1	
6123	1/0001	1/4 RIGID FILE THIN	GEN	GEN	0	PCS	35	1	Out of Stock
6023	1018	A/3 BLACK PRINT	GEN	GEN	0	PCS	90	1	
6021	1019	A/3 COLUER PRINT	GEN	GEN	0	PCS	50	1	



# Multiple MIS Reports

The Management Information System (MIS) reports provide comprehensive analysis and details for all orders.

- We provide three kind of MIS report.
  - 1.Item Wise
  - 2.Order Wise
  - 3.With GST calculation

Which depicts following information:

- Order Details: MIS reports include information on products within each order, along with the details of the order creator and the approval status. It tracks who approved the order and any status updates from the authorization process.
- Delivery Information: The reports display delivery dates and the number of days required to fulfill each order, offering insights into delivery timelines.
- Additional Details: Reports also include tier levels of cities and GST calculations for all products and total orders, ensuring thorough financial and logistical tracking

MIS REPORT ITEM WISE Export To Excel

From Date: 26/08/2024 Upto Date: 26/08/2024 Filter Show all Skip Repeat Columns

ZEE STUDIOS LIMITED <--Select-->

Agreement No	Tier	TAT	Branch ID	Branch Name	Order No	Ordered Date	Ordered Month	Approved Date	Status Date	Status	Invoice No	Maker Name	Maker Email Id
1222	4	1		ANDHERI - WEST, MUMBAI	454	10/07/2024	Jul	18/07/2024		Awaiting Approvel		Pradeep	psm01@rediffmail.cor
										Awaiting Approvel		Pradeep	psm01@rediffmail.cor
										Awaiting Approvel		Pradeep	psm01@rediffmail.cor
1219	4	1		ANDHERI - WEST, MUMBAI	453	10/07/2024	Jul	10/07/2024	23/07/2024	Shipped		Corporate New	copsm
									23/07/2024	Shipped		Corporate New	copsm
									23/07/2024	Shipped		Corporate New	copsm
									23/07/2024	Shipped		Corporate New	copsm
									23/07/2024	Shipped		Corporate New	copsm
									23/07/2024	Shipped		Corporate New	copsm
1211	4	1		ANDHERI - WEST, MUMBAI	451	31/05/2024	May			Awaiting Approvel		Pradeep	psm01@rediffmail.cor
										Awaiting Approvel		Pradeep	psm01@rediffmail.cor
										Awaiting Approvel		Pradeep	psm01@rediffmail.cor
1208	4	1		ANDHERI - WEST, MUMBAI	450	31/05/2024	May			Awaiting Approvel		Pradeep	psm01@rediffmail.cor

# Challan Receipts Entry

When a vendor creates a challan, users receive a notification. Here’s how to handle the challan:

- **Accepting the Challan:** Users can accept the challan directly from the notification. There is option in authorization menu too.
- **Uploading Documents:** Users can upload the signed challan into the software for record-keeping.
- **Checking Details:** The challan entry includes options to review products, tracking information, and shipping details, ensuring that all aspects of the delivery are accurately documented and monitored.

DashboardOrder nowPrintingFavouriteMy ProductsAuthorizationReportsHelp

VERIFY CHALLAN

From Date

03/06/2024

Upto Date

26/08/2024

Department

ANDHERI - WEST, MUMBAI

Filter

Show All Delivered Orders

UpdateExport To Excel

Order No	Order Date	Corporate	Department	Emp Name	CHNO	CHDATE	Items	View
446	2024-03-27	ZEE STUDIOS LIMITED	Delhi	Pradeep	C5466	23/07/2024	4	View

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DELIVERY CHALLAN

PSM SoftTech Pvt. Ltd.

B226, Orchard Road Mall, Array Milk Colony Goregoan (E), Mumbai, India

022287666 9004377665

mumbai@psmsofttech.com

Maharashtra, India

Upload Your Sign Copy

Choose File

No file chosen

Upload

.pdf files only

GSTIN Number:27A

Challan No: C5466

Date: 23/07/2024

P.O.NO.: 446

P.O.DT.: 27/03/2024

Department.: Delhi

Cost Center.: 0

Location.: Delhi

Employee: Pradeep(E001)

Approved by: Corporate New

Approved On: 27/03/2024

Tracking URL: [Track](#)

Delivery by.: PRADEEP

Box Size.: 40X70X120

Carrier Name.: courier details

AWB No.: 869008967

Box Weight.: 250 GM

Challan URL.: [View](#)

Bill to

M/s ZEE STUDIOS LIMITED

LEVEL 5 FUN REPUBLIC OPPOSITE LAXMI INDU OFF NEW LINK ROAD ANDHERI WEST MUMBAI 400 053

GSTIN Number:9004377665

State Code:27

Remark :

Consignee Shipped to

Pradeep(E001)

Delhi,Delhi,Delhi,07-Delhi-

Item Id	QTY	UNIT	Particulars	HSN Code	GST %	Rate	Net Total	Select
1192	1	PCS	0.5MM POLYCAB FLAXEBLE CABLE NEW	85446090	18	50	59	<input checked="" type="checkbox"/>
1193	1	BUN	1 MM POLYCAB WIRE (90 MTR BUN )	8544	18	15	17.22	<input checked="" type="checkbox"/>
1194	1	BUN	1.5 MM POLYCAB WIRE (300 MTR BUN )	8544	18	79	99.22	<input checked="" type="checkbox"/>
1195	1	PCS	A/3 BLACK PRINT	998912	18	90	106.2	<input checked="" type="checkbox"/>
Total							276.12	

Accept

Back

# Invoice Information

Only Corporate Admins can access invoice information through the reports section:

- Invoice List: The reports section includes an option to view a list of invoices.
- Details: Each report displays orders associated with the generated invoice.
- PDF Access: By clicking the "View" option, users can check the PDF of the invoice, and also download and print it if needed.

ID	Code	Name	Category	MRP	Unit	Rate	Ord Qty	Action
6135	0.0001	0.5MM POLYCAB FLAXEABLE CABLE NEW	GEN	200	PCS	50	1	
6133	1002	1 MM FEXIBEL WIRE ( 90 MTR BUN )	GEN	0	BUN	60	1	
6132	10001	1 MM POLYCAB WIRE (90 MTR BUN )	GEN	0	BUN	15	1	
6130	1.0005	1.5 MM POLICAB WIRE ( 90 MTR BUN )	GEN	0	BUN	80	1	
6129	1003	1.5 MM POLICAB WIRE (200 MTR BUN )	GEN	0	BUN	65	1	
6128	1004	1.5 MM POLYCAB WIRE (300 MTR BUN )	GEN	0	BUN	79	1	

LIST OF INVOICE										
From		Upto		Department						
01/04/2024		23/08/2024		<--Select-->		Filter				
09/07/2024	bill0011	Raghunandan.Singh	Raghunandan.Singh@Cevalogistics.com	9988999999	Raghunandan.Singh	Raghunandan.Singh@Cevalogistics.com	4	317	0	View
09/07/2024	bill0011	Raghunandan.Singh	Raghunandan.Singh@Cevalogistics.com	9988999999	Raghunandan.Singh	Raghunandan.Singh@Cevalogistics.com	2	465	0	View
02/07/2024	Inv0001	Approve 2	Approve 2	9898192312	Approve 2	Approve 2	2	100	0	View
02/07/2024	00123132	Requester 1	requester	9989898989	Approve 2	Approve 2	2	415	0	View
02/07/2024	00123132	Requester 1	requester	9989898989			2	2360	0	View
02/07/2024	00123132	Requester 1	requester	9989898989			2	185	0	View
02/07/2024	00123132	Requester 1	requester	9989898989			5	257	0	View
02/07/2024	00123132	Requester 1	requester	9989898989			2	315	0	View

# Vendor Login

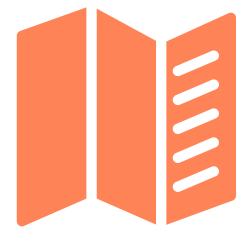
The Vendor has full administrative control over the software, managing all user roles, settings, and system maintenance. This includes the authority to manage permissions, configure dashboards, and oversee order systems across the platform. This feature allows the Vendor to view comprehensive details of all orders generated by customers, organized by their current statuses. Whether the orders are pending, approved, on hold, or canceled, the system provides a clear and organized overview, making it easier to track and manage customer orders efficiently.





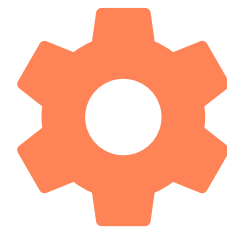
# Admin (Vendors) Primary Features

The Vendor can create and manage master data, which forms the foundation for the system's operations. This includes setting up key elements such as corporate entities, departments, products, users, and couriers. Proper management of this master data ensures that the system functions efficiently and that all processes are accurately supported.



## Corporate Creation

Corporate creation, yearly amount limitations



## Department Creation

Department Manager who can manage his own departments



## Product Entry

Create product category, its brand entry for filtration . Also to add product list using excels or in other ways



## Couriers

Courier entries , its tracking URL for tracking package location



## Mapping

Map products with rate to complete company. And map departments to the users for which he works

# Product master

Products: The Vendor is responsible for creating and managing products within the catalog. This includes entering essential information such as the Maximum Retail Price (MRP), sale rate, GST percentage, and other critical details that influence product listing and sales.

To enhance product organization and filtering, the system incorporates two supportive masters: the Category Master and the Brand Master. These masters play a vital role in classifying and sorting products, making it easier for users to find and select items based on specific categories and brands within the catalog.

ID	Code	Name	Company	Category	Unit	HSN	GST(%)	Our Price	Action
6148	34234	Pradeep Mishra	Allen Solly	abc	PCS		5	0	
6147	1	Shoes	Allen Solly	Shoes	PCS		10	0	
6146	PR002	PRODUCT	GENERAL	GENARAL	PCS	0000	5	250	
6145	001	Visiting Card	GEN	GENARAL	PCS		18	10	
6144	0002	Visiting Card	GENERAL	GENARAL	PCS		0	0	
6143	Code0001	Water Bottles 250ml	DOLPHIN	Bottle	BOX		18	0	
6142	11MOP	Imon	GFN	ahr	PCS	11764	18	550	

**PRODUCT EDIT**

Update Cancel

Code\* 34234 Name\* Pradeep Mishra

Category\* abc Brand Company\* Allen Solly

Packing PCS Fixed Unit\* PCS

Colour RED Size

GST(%) 5 MRP 0

Our Price 0 Cost Price 0

Remark

Barcode

Image

Printing ☐ Is Printing Item

# Corporate master

**Corporate:** The Vendor is responsible for setting up and managing corporate entities within the system. This setup includes entering critical details such as the contact person's email ID, contact number, head office address, GST number, and other required information.

The Vendor can set a Yearly Order Limit to restrict orders above a set amount and manage contract dates for corporate agreements. Additionally, the Vendor can upload and control the display of the corporate logo and customize the user interface settings for all logins.

The system allows the Vendor to define approval levels as follows:

- Approval Level 1: Orders placed by employees are automatically approved without needing any additional authorization.
- Approval Level 2: Orders can be approved by either the department head or the corporate head.
- Approval Level 3: It is mandatory for the employee to obtain approval from both the department head and the corporate head.

**mahindra FINANCE**

GENERAL

Dashboard 2

Masters

Franchise New

Mapping New

TRANSACTION

Orders pending for d...

Franchise pending or...

Update Invoice

REPORTS

Orders

Challen List

MIS Reports

Partial Approved orde...

PAN No

LBT No

Bank

Transport

Approval levels

Level 1

Agreement Start

11/04/2023

Choose File No file chosen

jpg files only (width: 255px, height: 75px)

Yearly Order Limit

Agreement Valid Upto

11/04/2023

☐ Enable logo

☐ Disable Address

☐ Enable Order Page at Login

☐ Enable Default Image Tab

Save Cancel

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# Department master

**Departments:** The Vendor is responsible for setting up and managing departments within each corporate entity, which plays a crucial role in order management. At least one department must be created for each corporate entity. This setup includes essential fields such as the department name, address, contact person's name, and their contact details.

Each department can have specific settings and limitations:

- Minimum Order Limit: Ensures that users can only create orders above a specified amount.
- Tier City Level: Defines the city tier level, which might influence approval and delivery processes.

- Approval Limit: Restricts department admins from approving orders that exceed a certain amount.

Additionally, the Vendor can set a Monthly

Order Limit, which serves two purposes:

- Warning Limit: Alerts users when they are nearing the monthly order limit.
- Restriction: Prevents users from placing more than one order within a 24-hour period if the limit is reached.

The screenshot shows the 'Department Master' form in the Mahindra Finance system. The form is organized into two main columns. The left column contains fields for 'City\*', 'Phone', 'Email', 'CC Email', 'Admin Name', 'Branch Id Name', 'Monthly Order Limit', and a checkbox for 'Not Allow Multiple Orders'. The right column contains fields for 'website' (starting with 'http://'), 'Tier List' (set to 'Tier 1'), 'Minimum Order\*', 'Order approval limit', 'Delivery Day', 'Pincode', and 'Cost Centre'. Two red boxes highlight the 'Monthly Order Limit' field in the left column and the 'Minimum Order\*' field in the right column. At the bottom left, there are 'Save' and 'Cancel' buttons. The top of the form features the Mahindra Finance logo, a search bar, and a user profile dropdown for 'cello admin'.



# User master

**Users:** The User Master allows the Vendor to create and manage users across all levels within the Corporate structure, including Employees, Department Admins, and Corporate Admins. Each user entry requires key information such as a unique mobile number and email ID to ensure distinct identification.

Additionally, the Vendor can customize the user interface based on the user's role, granting appropriate user rights and permissions accordingly. This ensures that each user has access to the features and functionalities relevant to their responsibilities within the organization.

GENERAL

Dashboard 2 >
Masters >
Vendors New >
Mapping New >

TRANSACTION

Orders pending for d...
Franchise pending or...
Update Invoice

REPORTS

Orders >
Challan List
MIS Reports >
Partial Approved ord...
Category Wise Sales
Inquiry List
Deleted Order list
Custom Reports

USERS / EMPLOYEES ENTRY

Corporate \*

Sadabahar Bank

User Code/ Employee ID \*

CORP01

Mobile No \*

9999999999

User ID \*

director@sdb.com

Password \*

\*\*\*\*\*

Generate Password

☒ Active/deactive
☒ Send Email User ID & Password
☒ Stop Email notification

Update

Cancel

Select Department \*

Head Office

User Name \*

Director

Employee Designation

Email ID \*

director@sdb.com

Operate As \*

Corporate admin

☐ Hide MRP
☐ Hide Sale Rate
☒ Stop SMS notification

Update

Cancel

ID	CORPORATE	DEPARTMENT	CODE	NAME	MOBILE	EMAIL	DESIGNATION	USERID	ACTIVE/DEACTIVE CRID	DPID	Operate As	Action	
1110	Sadabahar Bank	Head Office	CORP01	Director	9999999999	director@sdb.com		director@sdb.com	True	14	25	Corporate admin	
1111	Sadabahar Bank	Head Office	CORP02	Ast. Director	8888888888	astdir@sdb.com	Ast. Director	astdir@sdb.com	True	14	25	Corporate admin	

# Courier master

**Courier:** The Courier entry is a crucial component of the order management system. It includes essential information about the courier companies, such as their contact details and service capabilities. Additionally, the entry incorporates the courier's tracking URL, which is linked to orders during delivery. This integration allows for real-time tracking of shipments and enhances the overall efficiency of the order fulfillment process.

GENERAL

Dashboard 2 >
Masters >
Vendors New >
Mapping New >

TRANSACTION

Orders pending for d...
Franchise pending or...
Update Invoice

REPORTS

Orders >
Challan List
MIS Reports >
Partial Approved ord...
Category Wise Sales
Inquiry List
Deleted Order list
Custom Reports

COURIER / TRANSPORT ENTRY

Save
Cancel
Export To Excel

Courier Name\*

courier details

Contact Person

courier

Address

address

Tracking URL (AWB)

https://demo.psmsofttech.com/

Phone

02227657665

Mobile





courier 2

Email

email

Update

Cancel

ID	Transport Name	Address	Phone	Mobile	Email	TrackingURL	ContactPerson	Action
2	Bluedart		9137993629		priya@psmsofttech.com		Ricky	 
1	courier details	address	02227657665	courier 2	email	https://demo.psmsofttech.com/	courier	 

# Mapping

The Vendor is tasked with meticulously mapping various elements within the system. This critical responsibility ensures optimal organization and functionality throughout the platform. By identifying and interlinking diverse components, the Vendor creates a cohesive framework. This process not only facilitates seamless operations but also minimizes potential disruptions. Each element is strategically positioned to enhance overall efficiency. The careful integration of components allows for smoother workflows. As a result, users experience improved accessibility and performance. Ultimately, the Vendor's efforts contribute to a robust system architecture. This commitment to detail reinforces the platform's reliability. Together, these elements create a streamlined experience for all users.



# Users to Department mapping

This feature allows for the association of specific departments with customer accounts, ensuring that orders and interactions are correctly routed. Through this mapping, a single user can place orders or authorize them based on the department's association with the customer account. This setup streamlines order processing and ensures that all transactions are managed according to the designated departmental structure.

GENERAL

Dashboard 2

Masters

Vendors New

Mapping New

Department Mapping

Rate Mapping

Franchise Corporate Mappi...

Employee Monthly Limit M...

TRANSACTION

Orders pending for d...

Franchise pending or...

Update Invoice

REPORTS

Orders

Challan List

MIS Reports

Partial Approved ord...

Category Wise Sales

DEPARTMENT MAPPING WITH USERS

Select Corporate

Sadabahar Bank

Select Users

Accountant

Select Department

<-Select-->

Map Department with users

Department mapped Successfully !!

ID	Corporate	Department	Delete
48	Sadabahar Bank	Bangalore Department	
49	Sadabahar Bank	Borivali Department	
50	Sadabahar Bank	Chennai Branch	
51	Sadabahar Bank	Dahisar Department	
52	Sadabahar Bank	Head Office	
53	Sadabahar Bank	Pune branch	

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# Product Mapping to Corporate

This process involves linking products to specific corporate entities, allowing for rate mapping and the creation of customized catalogs for corporate users. By associating products with particular corporates, the system ensures that corporate users have access to the correct product offerings and pricing tailored to their organization's needs. This mapping is essential for accurate order processing and personalized service delivery.

GENERAL

Dashboard 2

Masters

Vendors New

Mapping New

TRANSACTION

Orders pending for d...

Franchise pending or...

Update Invoice

REPORTS

Orders

Challan List

MIS Reports

Partial Approved ord...

Category Wise Sales

Inquiry List

Deleted Order list

Custom Reports

CORPORATE / BRANCH / FRANCHISE RATE MAPPING

6148

Total Product List

4

Total Assigned Product

Select Corporate

Sadabahar Bank

Map to all

Select Company

<-Select-->

Select Category

<-Select-->

Enter Name

Enter Name

Filter

ID	Code	Name	Company	Category	MRP	Rate	Min Qty	Max Qty	Out of Stock	Assign	Delete
6135	0.0001	0.5MM POLYCAB FLAXEABLE CABLE NEW	GEN	GEN	200	200	1	0	<input type="checkbox"/>	<input type="button" value="Assign"/>	<input type="button" value="Delete"/>
6134	000001	000 BIG	GEN	GEN	5000	0	1	0	<input type="checkbox"/>	<input type="button" value="Assign"/>	<input type="button" value="Delete"/>
6133	1002	1 MM FEXIBEL WIRE ( 90 MTR BUN )	GEN	GEN	0	0	1	0	<input type="checkbox"/>	<input type="button" value="Assign"/>	<input type="button" value="Delete"/>
6132	10001	1 MM POLYCAB WIRE (90 MTR BUN )	GEN	GEN	0	0	1	0	<input type="checkbox"/>	<input type="button" value="Assign"/>	<input type="button" value="Delete"/>
6131	1.0002	1.5 MM MULTISTAND CABLE	GEN	GEN	0	0	1	0	<input type="checkbox"/>	<input type="button" value="Assign"/>	<input type="button" value="Delete"/>
6130	1.0005	1.5 MM POLICAB WIRE ( 90 MTR BUN )	GEN	GEN	0	0	1	0	<input type="checkbox"/>	<input type="button" value="Assign"/>	<input type="button" value="Delete"/>
6129	1003	1.5 MM POLICAB WIRE (200 MTR BUN )	GEN	GEN	0	0	1	0	<input type="checkbox"/>	<input type="button" value="Assign"/>	<input type="button" value="Delete"/>
6128	1004	1.5 MM POLYCAB WIRE (300 MTR BUN )	GEN	GEN	0	0	1	0	<input type="checkbox"/>	<input type="button" value="Assign"/>	<input type="button" value="Delete"/>
75	1.0006	1.5 MM TRANFERNT WIRE OXIGAN FREE	GEN	GEN	0	0	1	0	<input type="checkbox"/>	<input type="button" value="Assign"/>	<input type="button" value="Delete"/>
6127	1.0003	1.5 SQ MM	GEN	GEN	0	0	1	0	<input type="checkbox"/>	<input type="button" value="Assign"/>	<input type="button" value="Delete"/>

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# Category Mapping to Employee

This feature allows the Vendor to map specific product categories to individual employees. Through this mapping, the Vendor can restrict employees from placing orders for certain products based on the order amount. This ensures that employees only have access to the product categories they are authorized to purchase, enhancing control over procurement and budget management

GENERAL

Dashboard 2 >
Masters >
Vendors New >
Mapping New >

TRANSACTION

Orders pending for d...
Franchise pending or...
Update Invoice

REPORTS

Orders >
Challan List
MIS Reports >
Partial Approved ord...
Category Wise Sales
Inquiry List
Deleted Order list
Custom Reports

SET EMPLOYEE CATEGORY WISE MONTHLY LIMIT

Save
Cancel
Export To Excel

Select Corporate  
Sadabahar Bank

Select Department  
Bangalore Department

Select Employee  
Manager

Save
Cancel

ID	Category Name	Under Category Name	Monthly Limit
13	Shoes	Sports Shoes	
12	abc	Primary	
11	Steel jar	Bottle	
10	Bottle	Primary	
9	Semi Formal	Formals	
8	Formals	Primary	
7	Sports Shoes	Primary	
6	CANDEL	Primary	
5	MOOP	Primary	
4	PENCIL	Primary	
3	GENARAL	Primary	
4			

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# Transaction

The Vendor plays a crucial role in managing critical transactions that underpin the platform's operations. These transactions are essential for maintaining the smooth functioning of various processes. By ensuring efficiency in these transactions, the Vendor helps to optimize the overall user experience. Each transaction is meticulously handled to prevent disruptions and maintain workflow continuity.

These critical transactions impact numerous aspects of the software's functionality. From order fulfillment to inventory management, each process relies on precise execution. Financial management also hinges on the accuracy and timeliness of these transactions. The Vendor's attention to detail ensures that all data is correctly processed and recorded.

As a result, users can trust that their interactions with the platform are seamless and reliable. The Vendor's expertise directly contributes to the system's stability and performance. This dedication to efficient transaction handling enhances the platform's overall integrity. In turn, it fosters user confidence and satisfaction. Ultimately, the Vendor's efforts are vital in creating a robust operational environment. By streamlining processes, they help the platform thrive in a competitive landscape.

40 mini

# Delivery Challan Entry

The Vendor records and manages delivery challans to ensure accurate tracking of product deliveries. Each challan entry includes details created through any ERP application. The Vendor can also upload a PDF file of the challan. Additionally, by selecting the courier and providing the tracking URL, this information is saved in the challan and is reflected in the corporate logins, enabling seamless tracking and verification of deliveries.

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PENDING ORDER FOR DELIVERY

Update Cancel

Order No432

Order Date13/03/2024 12:19:22

Order ByDirector(CORP01)

DepartmentBorivali Department

Our Challan No

Our Challan Date28/08/2024

Delivery Address

Borivali west  
,Borivali,Mumbai,27-Maharashtra-

Remark

Delivery By

Carrier Name<--Select-->

AWB No

Tracking URL

Courrier Box Size

Courrier box weight

Shipping Date28/08/2024

Final Delivered Date

Actual Status

Final Delivered Status updated By

Update Cancel

Upload File

Choose file No file chosen

.pdf files only

ID	PDID	INAME	ORDER QTY	DISPATCH QTY	RATE	TOTAL	GST	NET TOTAL
1148	6135	0.5MM POLYCAB FLAXEBLE CABLE NEW	1	1	200	200	18	236
1149	6137	Asic Sports shoes	1	1	4000	4000	18	4720
1150	6144	Visiting Card	1	1	250	250	0	250

Sub Total:

4450

GST Amt.:

756



# Update Invoice

Generate and manage invoices for orders within the system. Invoices can be updated for orders that have associated delivery challans. These challans can be filtered by corporate name and department to streamline the process. To create an invoice, simply enter the invoice number and upload the PDF file. The invoice will then be visible only to higher authorities within the corporate entity, ensuring secure and controlled access.

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Export To Excel

From: 29/08/2024

Upto: 29/08/2024

Corporate: <--Select-->

Department:

Filter

Show All Inquiry List

INQ. No	Order Date	Corporate	Department	EmpID	Emp Name	Total Items	Values	View
49	20/03/2024	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	1080	Pradeep	3	0	<a href="#">View</a>
48	24/02/2024	Sadabahar Bank	Dahisar Department	1115	Human Resource	1	0	<a href="#">View</a>
47	22/02/2024	Sadabahar Bank	Dahisar Department	1115	Human Resource	2	0	<a href="#">View</a>
46	06/02/2024	ZEE STUDIOS LIMITED	ANDHERI - WEST, MUMBAI	1080	Pradeep	8	0	<a href="#">View</a>
45	31/01/2024	Sadabahar Bank	Bangalore Department	1115	Human Resource	2	11.8	<a href="#">View</a>
44	29/11/2023	Sadabahar Bank	Chennai Branch	1118	Employee	1	0	<a href="#">View</a>
43	29/11/2023	Sadabahar Bank	Chennai Branch	1118	Employee	3	0	<a href="#">View</a>
42	28/11/2023	Sadabahar Bank	Chennai Branch	1119	Accountant	4	1062	<a href="#">View</a>
41	28/11/2023	Sadabahar Bank	Chennai Branch	1118	Employee	3	1062	<a href="#">View</a>
40	28/11/2023	Sadabahar Bank	Head Office	1110	Director	3	1062	<a href="#">View</a>
39	27/11/2023	Sadabahar Bank	Chennai Branch	1118	Employee	3	0	<a href="#">View</a>
38	06/11/2023	Sadabahar Bank	Bangalore Department	1116	Manager	1	0	<a href="#">View</a>
37	06/11/2023	Sadabahar Bank	Bangalore Department	1116	Manager	4	1062	<a href="#">View</a>
36	06/11/2023	Sadabahar Bank	Bangalore Department	1116	Manager	4	1062	<a href="#">View</a>
35	01/11/2023	HARSHAD SHOE MART	HARSHAD SHOE MART	1092	HARSHAD	4	1062	<a href="#">View</a>

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## Reports (Vendor Login)

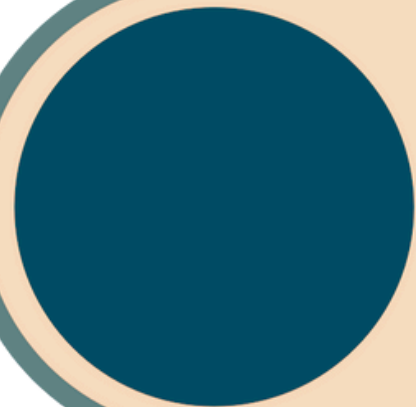
The Vendor has access to various reports available through corporate logins. These reports provide detailed insights into the platform's operations. With this access, the Vendor can effectively monitor key metrics. The reports enable comprehensive analysis of system performance. This ensures the Vendor stays informed about operational efficiency. By tracking orders, the Vendor can identify trends and patterns. Access to real-time data allows for prompt decision-making. The Vendor can address issues proactively to maintain smooth functionality. Insights from the reports help optimize processes and enhance user experience. Regular review of these reports aids in strategic planning. The Vendor can allocate resources more effectively based on insights. Overall, this access empowers the Vendor to enhance platform performance. With detailed reporting, the Vendor can support ongoing improvements. This ensures the system remains responsive to user needs. Ultimately, informed decisions lead to better outcomes for the platform. The collaborative effort between the Vendor and the platform fosters success. Access to corporate reports is crucial for ongoing operational excellence. This partnership ensures the platform continues to thrive.

## Order List (Approved)

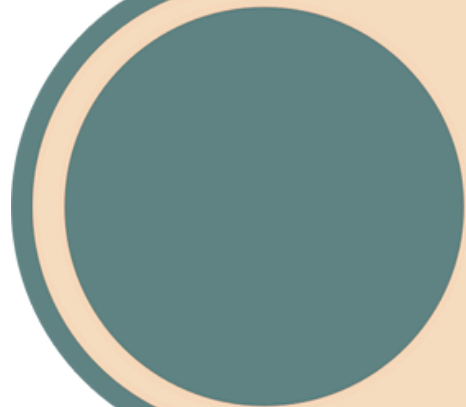
**Partial Dispatch Report:** This report displays orders that have been partially dispatched, along with a detailed list of the products that are still pending delivery within those orders. This helps in tracking incomplete shipments and ensures that the remaining items are properly managed and dispatched

**Approved Order List:** This report provides a comprehensive list of all orders that have been approved. It includes orders that are currently in processing as well as those that have been completed, offering a clear overview of approved transactions within the system.

## Order List (Pending)



**Hold Order List:** This report provides a list of orders that are currently on hold, awaiting further action or approval. It helps in tracking orders that are temporarily paused and require additional steps before they can proceed.



**Cancel Order List:** This report lists all orders that have been canceled, along with the reasons for their cancellation. It provides insights into why orders were not completed, helping to identify potential issues or patterns in the ordering process.



## Challan List

This report offers a detailed list of all delivery challans, tracking the status and specific details of each product delivery. It helps in monitoring the fulfillment process, ensuring that all deliveries are accurately recorded and tracked from dispatch to receipt.

## Category-wise Sales

This report breaks down sales data according to product categories, offering valuable insights into the performance of each category. It helps in identifying which categories are driving the most sales, allowing for better strategic planning and inventory management.



# MIS Report

**MIS Report with Item:** The analysis examines orders by individual items, detailing their quantities and current status. This provides valuable insights for inventory management and order fulfillment.

**MIS Report with Order:** The report provides a summary of orders, including detailed status and approval information. This ensures clarity and transparency in the order management process.

**MIS Report with GST:** The report includes GST calculations, providing a comprehensive financial overview. This ensures clarity on tax details and their impact on overall costs.



# Thank You!



**PSM SOFTTECH**  
WE BUILD YOUR CONCEPT

**Connect with us.**



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