

Local sales order workflow

For Sandesh Agarbathi Company

A picture containing text, clipart

Description automatically generated



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Login Screen

Graphical user interface, application

Description automatically generated

Image 1

Login Page also called as Entry Page to the LSO App that requires user identification and authentication Created by ERP application Administrator.

Dashboard

Graphical user interface, text

Description automatically generated

Image: 2

Dashboard with vital information:

|  |  |
| --- | --- |
|  | For Syncing Customers and Invoices to the Cloud server which will again sync Data with ERP |
|  | For a quick Invoicing |
|  | Menu Listing |

Sync Data

Graphical user interface, application

Description automatically generated

Image 3

By clicking on the ‘SYNC DATA’ button ‘Sync Progress’ Screen appears.

This action will Port Customer’s Data, Items with Price, and Disc from ERP System to LSO APP through Cloud Server

MENU

|  |  |
| --- | --- |
| Menu | Functions |
| Text  Description automatically generated | User Login Details on the Header |
|  | Will Route you to the Dashboard |
|  | All Customer details servicing can be done in this Menu |
|  | Entered Sales Orders and Prints can be viewed in this Menu |
|  | For Login Out from the LSO App click here |

Creating Local Sales Order

Step1: Click on ‘**+’** CREATE LSO

Step2: Select the Customer

Graphical user interface, application

Description automatically generated

Image 4

Step 3: Click Continue

Step 4: Select Item

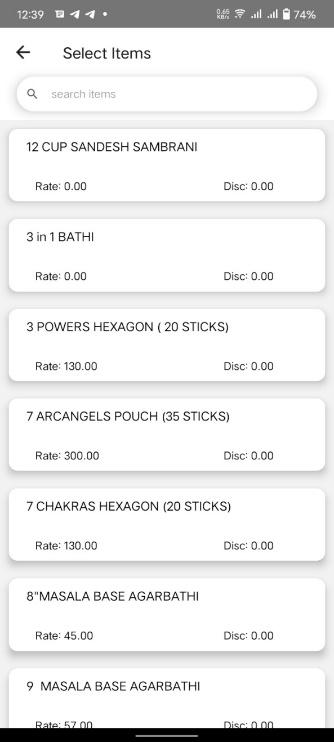


Image 5

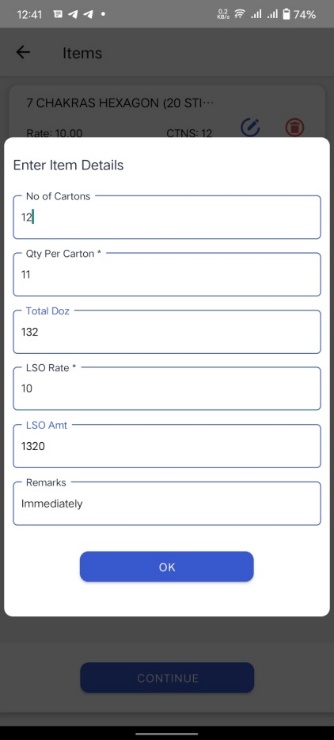


Image 6

Step 5: A Window will pop up as shown in image 6

Step 6: Enter Item Details

No. of Cartons

Qty per Carton

Total Doz (Automatically calculates: (No. of Cartons X Qty per Carton))

LSO Rate

Total Amount will be calculated automatically (Doz X LSO Rate)

Enter Remarks

Step 7: Click Ok

Preview of Items along with other Item related information in Image7.

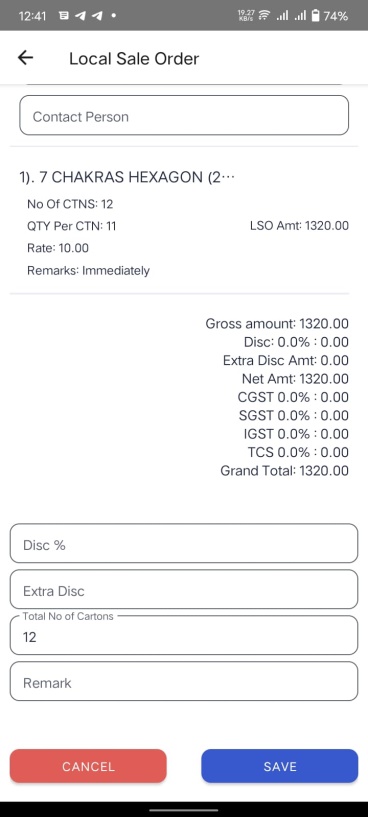
User can Edit or Delete Items shown in the Preview with the option on the right side on the screen.

A picture containing shape

Description automatically generated

Image 7

Step7 Click on CONTINUE



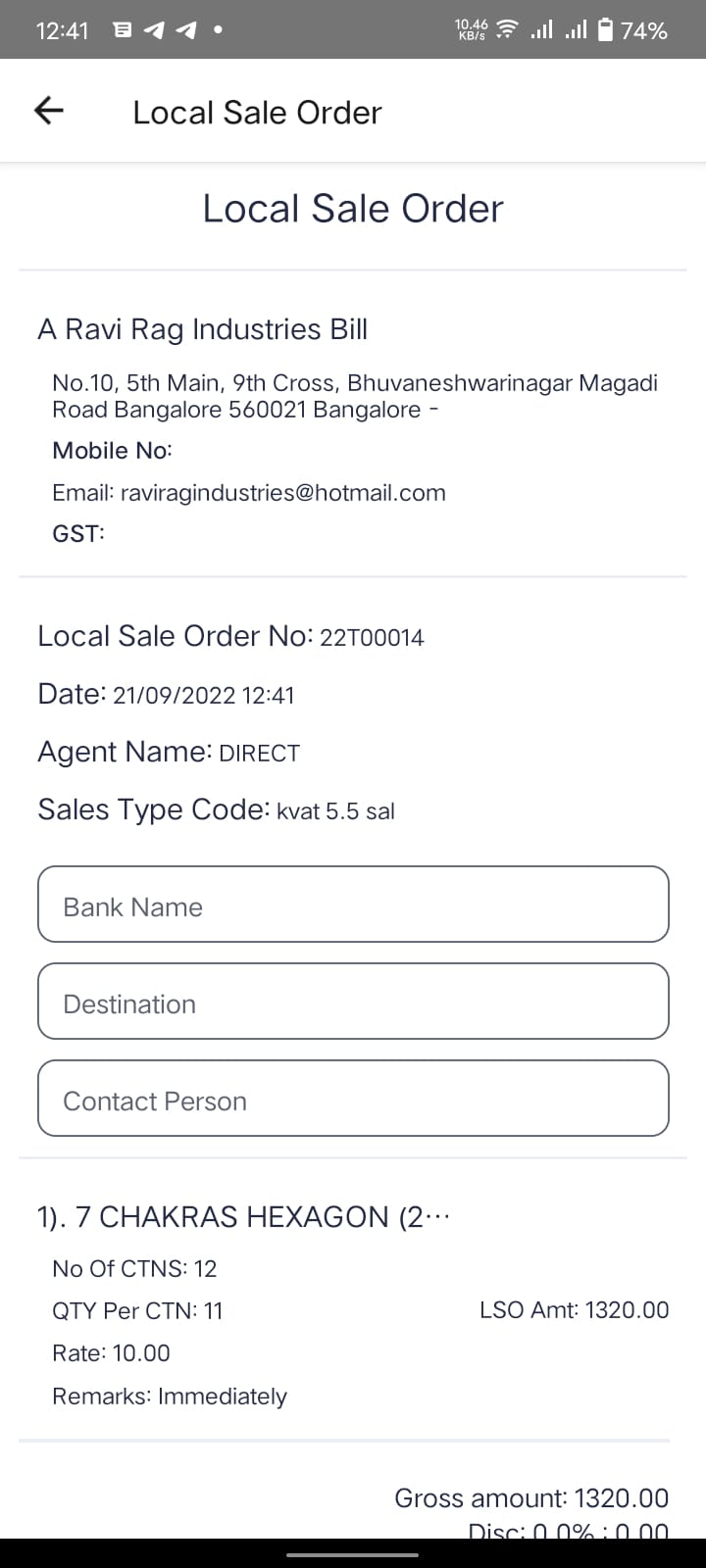


Image 8

Step 8 Enter Details (Optional)

Bank

Destination

Contact Person

Disc %

Extra Disc

Remarks

Note: No of Cartoons is Calculated Automatically

Step9 Click Save

Step10 Click on Yes in the info box as per Image

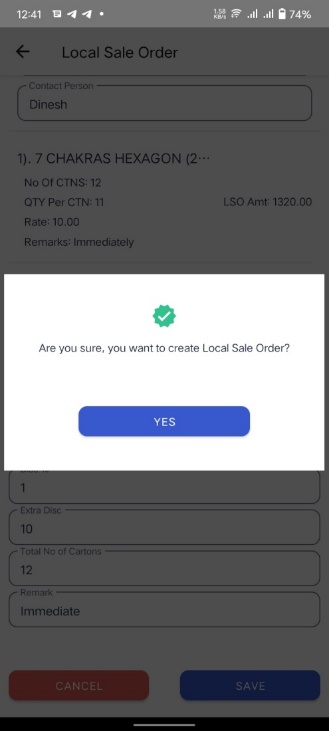


Image 9

For Printing and Sharing Invoice

Step1 Go to Dashboard or Home Page of LSO

Step2 Click on Menu

Step3 Click on Local Sales Order

List of invoices will appear as shown in Image 10

Note: Dynamic search option to search invoices based on the Invoice No., Customer Name, etc.

Step4 Double click on the Invoice

Invoice will load in Local Sales Details as shown in Image 11

Step5 Click on ‘Share’

Graphical user interface, application

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Image 10 Image 11