Presence360

Presence360 ERP

User Manual-

Master Management &

Configuration Module

Contents

1. Overview

Presence360 is an intelligent, modular, and scalable ERP platform designed to digitize and streamline every aspect of your enterprise operations—from finance and procurement to inventory, compliance, and asset management. Built for organizations aiming for efficiency, transparency, and real-time decision-making, Presence360 empowers your teams with automation, analytics, and secure digital workflows.

We envisioned a platform that could digitally transform how work is executed, tracked, and billed—especially in organizations with complex operations. Presence360 was born out of five core beliefs that shaped its foundation. First, digitization should be practical and field-ready, extending beyond head offices to include remote sites and on-ground teams. Second, time is capital; a delay in approvals or measurements today can lead to project setbacks and cost overruns tomorrow. Third, transparency builds trust, particularly when multiple stakeholders such as contractors, departments, and finance teams are involved. Fourth, data should drive decisions, which is why real-time dashboards, audit trails, and intelligent alerts are integral to the platform. Lastly, we believe in sustainability through simplification—by eliminating paper, reducing manual interventions, and enabling remote accessibility, we help organizations save time, cut costs, and operate more efficiently.

2. Getting Started with Presence360

You are all set to simplify, speed-up and smarten-up your work.

Before you begin, make sure your administrator adds you as a user and grants all, and any, of the appropriate permissions as per your role and scope of work.

Contact your administrator if you don't know your credentials.

3. Presenc360 Login

Go to Presence360 ERP Login Page

- Open your web browser and visit the official ERP URL:
  https://auth.thepresence360.com/login

Enter Your Registered Email ID

- In the **Email/Username** field, type your registered email address.

- Make sure there are no typos or extra spaces.

Enter Your Password

- Type the password associated with your account.

- Click the "eye" icon if you want to view the password while typing.

Click on the 'Login' Button

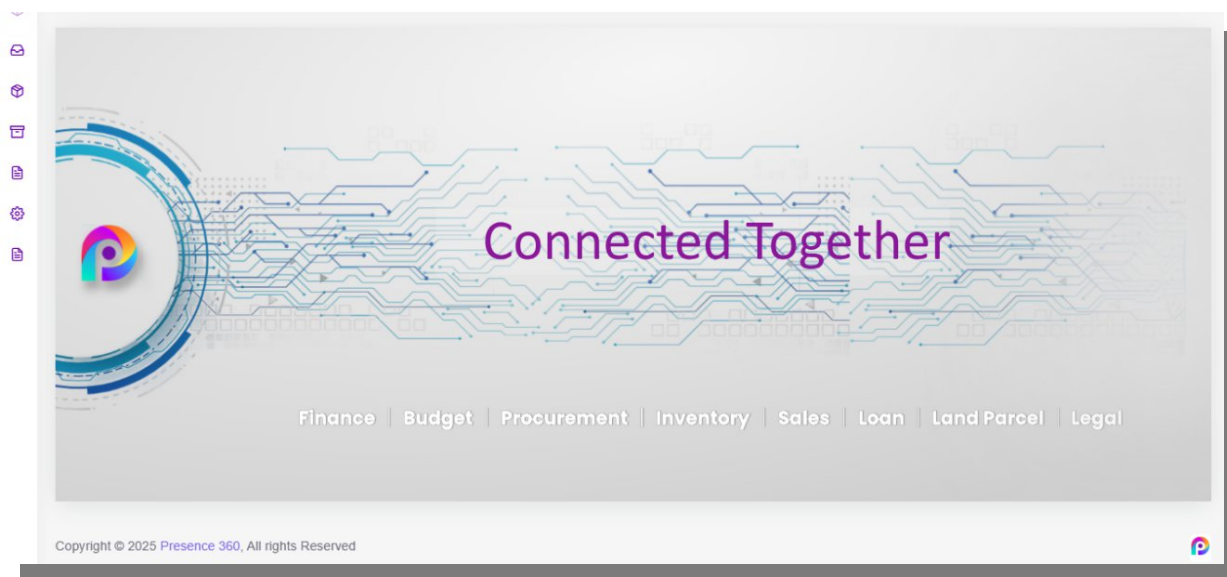- Press the **Login** or **Sign In** button to access your dashboard.

Two-Factor Authentication

- If 2FA is active, you will receive an OTP via email or SMS.

- Enter the OTP to complete verification.
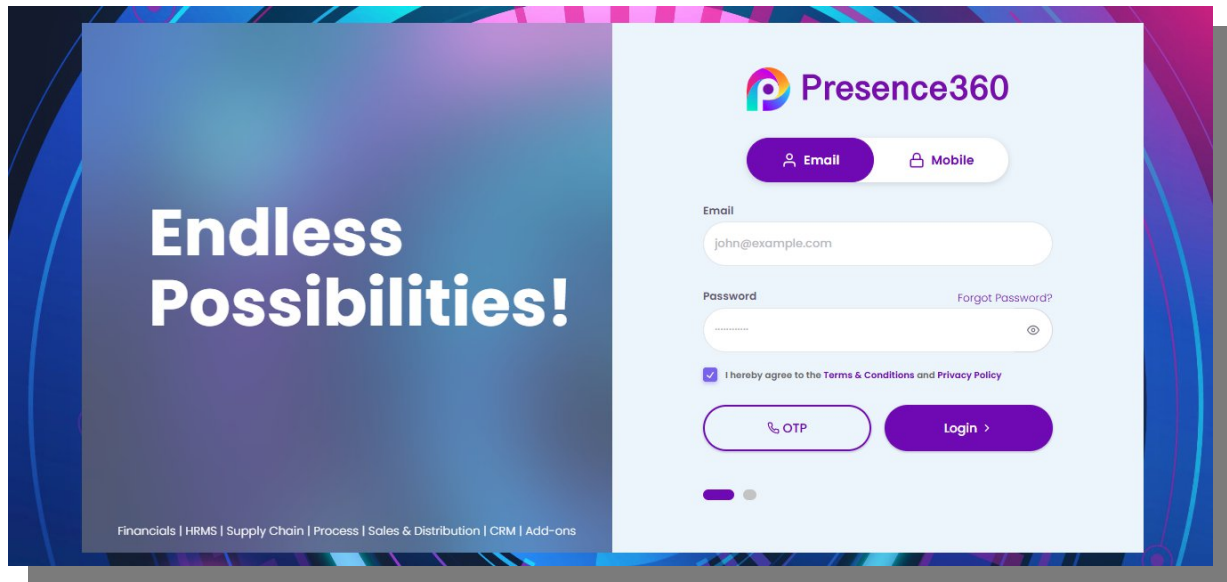

Access Granted

- Upon successful login, you will be directed to your personalized dashboard with access based on your assigned role (Admin, Finance, Procurement, etc.).

4. Master Management

The **Master Management** module in **ERP Presence 360** serves as the backbone of the entire ERP system. It holds and manages all the fundamental data that is reused across different business processes such as procurement, production, sales, inventory, compliance, and reporting. Setting up accurate and complete master data ensures smooth transactions, standardization, and reliable reporting across departments.

Flow Chart of Manufacturing Module:
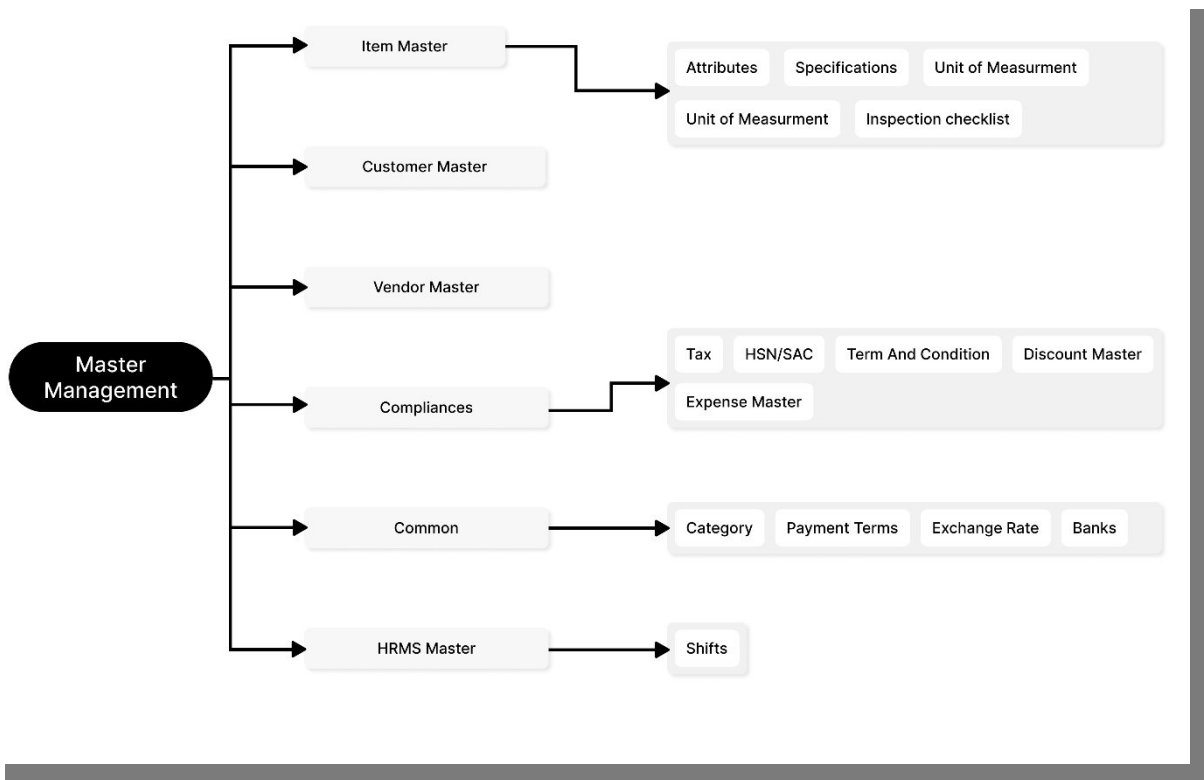
4.1. Item Master

The **Item Master** module is the heart of supply chain, production, and inventory functions. It serves as the central repository for all information related to products, raw materials, consumables, packaging materials, and more. This module ensures that every item involved in transactions is correctly defined with both technical and commercial attributes, enabling consistency, traceability, and control across the organization.

Within the Item Master, we define key commercial parameters such as:

- **Unit of Measure (UOM)**
- **Cost Price**
- **Selling Price**

In addition, the Item Master captures a wide range of technical and operational data, including:

- **Production Specifications** – Detailed formulation or bill of materials (BOM) required for manufacturing the item.
- **Item Attributes** – Physical, chemical, or other relevant characteristics of the item.
- **Alternative Units of Measure** – Conversion relationships between different UOMs for the same item.
- **Alternative Items** – Approved substitute items that can be used in place of the original.
- **Inventory Details** – Stocking type, storage conditions, batch control, expiry information, etc.
- **Approved Customers and Vendors** – Customer and supplier qualifications specific to the item for compliance and traceability.

By maintaining all of this information in one central location, the Item Master ensures data integrity, facilitates smooth operations, and supports effective planning, procurement, production, and sales processes.

- Item will only add after item is approved.
- Item code automatically generated and you can edit the same.

4.1.1.Attributes

Attributes define **characteristics or properties** of items that may vary across item variants.
Examples:

- **Color**: Red, Black, White
- **Size**: Small, Medium, Large
- **Material Type**: Cotton, Steel, EVA Foam
- **GSM / Thickness / Width**

Attribute Master   Home > Attribute List   [⊕ Add New]

Show [10 ⌄] entries   [⬆ Export ⌄]   Search: [_____]

S.NO	ATTRIBUTE NAME	SHORT NAME	ATTRIBUTE VALUE	STATUS	ACTION
1	THICKNESS	T	3, 4, 5, 6, 7 +3 more	Active	⋮
2	BREADTH	B	35, 36, 48, 60, 66 +2 more	Active	⋮
3	LENGTH	L	72, 75, 78, 84	Active	⋮
4	DENSITY	FD	28 D, 32 D, 40 D, 50 D	Active	⋮
5	FOAM COLOUR	FC	BLUE, GREEN, YELLOW, BLACK, ORANGE	Active	⋮
6	DRESS	DR	1000	Active	⋮
7	SLEEVE TYPE	SLEEVE TYPE	BALLON SLEEVE, BATWING SLEEVE, BELL SLEEVE, KIMONO SLEEVE	Active	⋮
8	FASHION SIZE	FASHION SIZE	XXS, XS, S, M, L +6 more	Active	⋮
9	FASHION COLOUR	FASHION COLOUR	BLACK, RED, ORANGE, GREEN, SKY BLUE +1 more	Active	⋮
10	FASHION WEAR TYPE	FASHION WEAR TYPE	PARTY, OFFICE, CASUAL	Active	⋮

Showing 1 to 10 of 17 entries   ‹ 1 2 ›

These attributes help create item variations and are critical for accurate pricing, inventory classification, and BOM generation.

4.1.2.Specifications

Specifications provide **technical and operational details** of an item.

These may include:

- Dimensions
- Operating voltage
- Strength or tensile rating
- Warranty period
- Performance metrics (for machinery or electronics)

These are used in quality control, procurement requirements, and technical BOMs.

4.1.3.Unit of Measurement

UOM standardizes how items are measured, stored, and transacted across all business processes, ensuring consistency in purchasing, production, inventory, and sales.

Types of UOM:

1. **Primary UOM**
- The main unit used for transactions and inventory tracking.
- Examples: **PCS (Pieces), MTR (Meters), KG (Kilograms)**

2. **Secondary / Alternative UOM**
- Additional units used for convenience in purchasing, sales, or production.
- Examples: **Box, Roll, Liter**

Key Features:

- **UOM Conversions:**
  The system allows for defining conversion factors between primary and secondary UOMs.
    o Example: *1 Roll = 25 Meters*

- **Defined in Item Master:**
  All UOMs and their conversion rules are configured directly in the **Item Master**, ensuring consistency and ease of use across all modules.

- **Critical for Operations:**
  UOM conversions are essential in scenarios like:

    o Purchasing in Rolls but consuming in Meters
    o Selling in Boxes but producing in Pieces

Units Home > Units List   ⊕ Add New

Show 10 entries   ⬆ Export ⌄   Search:

S.NO.	ALIAS	NAME	STATUS	ACTION
1	MTR	METERS	Active	⋮
2	PAC	PACKS	Active	⋮
3	D	DENSITY	Active	⋮
4	CBM	CUBIC METERS	Active	⋮
5	CTN	CARTONS	Inactive	⋮
6	NOS	NUMBERS	Active	⋮
7	BDL	BUNDLES	Active	⋮
8	BAG	BAG	Active	⋮
9	TUBES	TUBES	Active	⋮
10	L	LENGTH	Active	⋮

Showing 1 to 10 of 12 entries   < 1 2 >

Edit Unit Home > Edit   ⊕ Back 🗑 Delete ⊘ Update

Alias*   MTR

Name*   METERS

Status   ● Active ○ Inactive

4.1.4.Items

In ERP Presence 360, an **item** is anything that a company uses, buys, makes, or sells — like raw materials, semi-finished goods, or finished products. Each item has an **Item Code**, **Name**, **Unit** (like meters or pair), **HSN code**, **Type**, **Subtype**, and a **Parent Group**. Items can be active or inactive. This helps the company keep track of all materials and products clearly in one place.

Item Master Home > Item Master List   ▽ Filter ⬆ Import ⊕ Add New
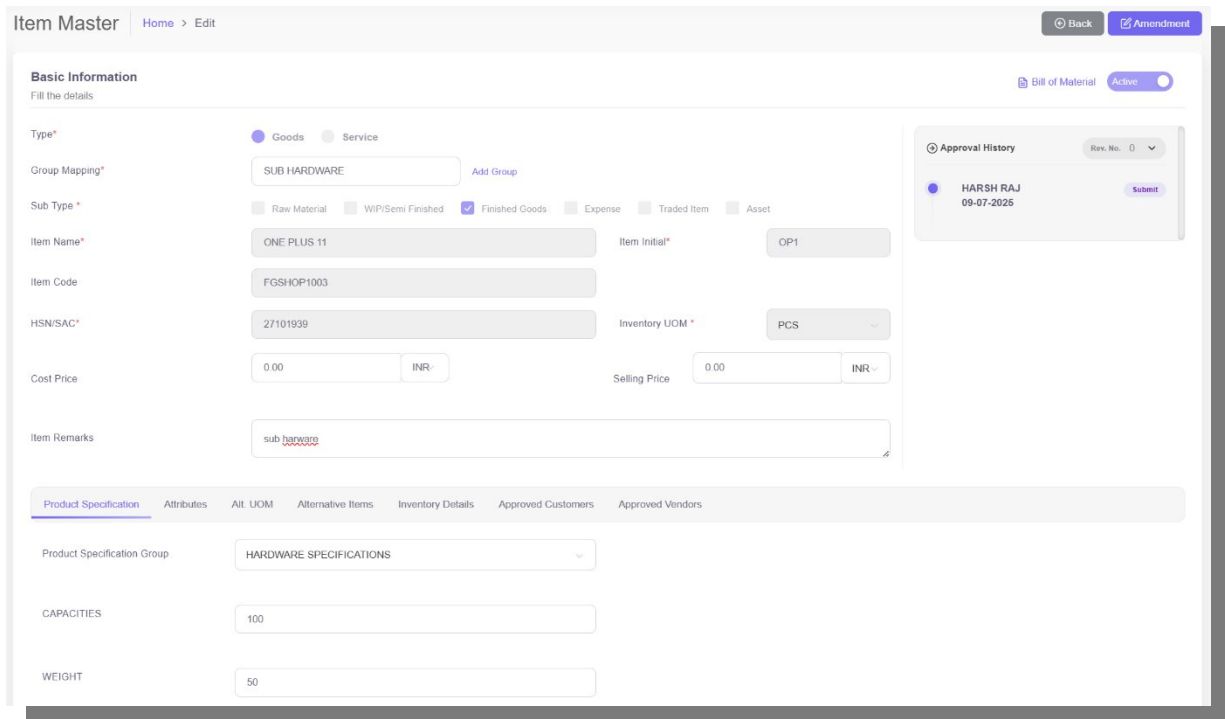
Show 10 entries   ⬆ Export ⌄   Search:

S.NO	ITEM CODE	ITEM NAME	UNIT	HSN	TYPE	SUBTYPE	PARENT GROUP	GROUP	CREATED AT	CREATED I	STATUS
1	FGSHOP1003	ONE PLUS 11	PCS	27101939	Goods	Finished Goods	N/A	SUB HARDWARE	09-07-2025	HARSH R/	Active ⋮
2	FGSHGP1001	GOOGLE PIXEL 14	PCS	27101939	Goods	Finished Goods	N/A	SUB HARDWARE	09-07-2025	HARSH R/	Active ⋮
3	FGSHHOA001	HONDA ACTIVA	PCS	27101939	Goods	Finished Goods	N/A	SUB HARDWARE	08-07-2025	HARSH R/	Active ⋮
4	FGSHHCP001	HP CHROMEBOOK PLUS X360	PCS	27101939	Goods	Finished Goods	N/A	SUB HARDWARE	07-07-2025	HARSH R/	Active ⋮
5	FGSHREP002	REALME P4	PCS	27101939	Goods	Finished Goods	N/A	SUB HARDWARE	07-07-2025	HARSH R/	Active ⋮
6	FGSHRN7001	REALME NARZO 70	PCS	27101939	Goods	Finished Goods	N/A	SUB HARDWARE	07-07-2025	HARSH R/	Active ⋮
7	FGSHRN8001	REALME NARZO 80	PCS	27101939	Goods	Finished Goods	N/A	SUB HARDWARE	07-07-2025	HARSH R/	Active ⋮
8	FGSCLOW001	LOWER	PCS	94042910	Goods	Finished Goods	CLOTH	SUB CLOTH	07-07-2025	Atul	Active ⋮
9	FGSHREP001	REALME P3	PCS	27101939	Goods	Finished Goods	N/A	SUB HARDWARE	04-07-2025	HARSH R/	Active ⋮
10	RMSHRE8001	REALME 8SS	PCS	94042910	Goods	Raw Material	N/A	SUB HARDWARE	04-07-2025	HARSH R/	Inactive ⋮

Showing 1 to 10 of 99 entries   < 1 2 3 4 5 ... 10 >

This section allows the creation and management of individual **item master records**, including:

- Item Code & Description
- Item Type (Raw Material / Finished Good / Consumable / Service)
- UOM
- HSN/SAC Code
- Tax Rates
- Default Vendor / Category
- Production Route or BOM mapping

Items are the building blocks for Sales Orders, Purchase Orders, Inventory, and BOMs.

4.2. Customer Master

The **Customer Master** holds the profile of all business clients. It is central to sales, dispatch, billing, and receivables.

Includes:

- Customer Name, Code & Type
- Billing and Shipping Address
- GSTIN / PAN / Country / State
- Credit Days & Payment Terms
- Default Salesperson / Sales Region
- Category (Retail / Corporate / Export)

This master ensures:

- Proper tax applicability
- Credit control
- Accurate documentation and reporting
- Customer will only add after item is approved.

- customer will get automatically generated and you can edit the same.

The system supports customer grouping and linking to specific price lists and discount structures.

Financial : You can map the ledger group, pricing type, Credit limit and Credit days to define and track the account receivable for Customer.

4.3. Vendor Master

The **Vendor Master** is essential for managing suppliers and service providers. It helps streamline the procurement process and tracks payment cycles.

Includes:

- Vendor Code, Name & Type
- Contact Information
- GSTIN / PAN / Compliance Details
- Payment Terms / Credit Days
- Preferred Currency
- Approved Items List
- Default Warehouse or Receiving Location
- Vendor will only add after item is approved.
- Vendor will get automatically generated and you can edit the same.

Vendor classification helps in evaluating supplier performance and cost control.

S.NO	VENDOR CODE	VENDOR NAME	TYPE	PHONE	EMAIL	GROUP	GST STATUS	CREATED AT	CREATED BY	UPDATED AT	STATUS
1	RTIT001	TITAN	Regular	N/A	N/A	N/A	N/A	07-07-2025	Atul	07-07-2025	Submitted
2	RATI001	ATIM	Regular	N/A	N/A	N/A	N/A	04-07-2025	Atul	08-07-2025	Active
3	RSTN001	STAQO NOIDA	Regular	N/A	N/A	N/A	N/A	19-06-2025	Atul	19-06-2025	Active
4	RSTD001	STAQO DELHI	Regular	N/A	N/A	N/A	N/A	19-06-2025	HARSH RAJ	19-06-2025	Active
5	RDLI001	DEEPENDER LIFE INSURANCE AGENT	Regular	N/A	N/A	N/A	N/A	25-04-2025	Tripti Gaggar	12-06-2025	Active
6	RMEI001	MEGHALAYA INDUSTRIES	Regular	N/A	N/A	N/A	N/A	25-04-2025	Tripti Gaggar	25-04-2025	Active
7	RGOC001	GOURAV CONSULTANT	Regular	N/A	N/A	N/A	N/A	25-04-2025	Tripti Gaggar	03-06-2025	Active
8	RVIG001	VIVEK GAGGAR	Regular	N/A	N/A	N/A	N/A	25-04-2025	Tripti Gaggar	03-06-2025	Active
9	RAGP001	A.G. POLYMERS	Regular	N/A	N/A	N/A	Active	08-04-2025	HARSH RAJ	06-06-2025	Active
10	RTAI001	TAPLE INDUSTRIES	Regular	N/A	N/A	N/A	Inactive	08-04-2025	HARSH RAJ	06-05-2025	Active

Showing 1 to 10 of 15 entries

Financial : You can map the ledger group, pricing type, Credit limit and Credit days to define and track the account receivable for Vendor.

4.4. Compliance
4.4.1.Tax

This section ensures that all **statutory requirements and commercial policies** are in place for automated processing and error-free documentation.

Defines tax structures such as:

- GST (CGST, SGST, IGST)
- TDS (Tax Deducted at Source)
- Custom Duty, Excise (if applicable)

Each item or service is linked with its appropriate tax rule, which automatically applies during transactions.

4.4.2.HSN/SAC

HSN (Harmonized System of Nomenclature) is used for **goods**, and SAC (Service Accounting Code) for **services**.

Maintaining this helps in:

- Accurate tax computation
- GST returns
- Legal compliance

HSN/SAC Master Home > HSN/SAC List   ⊕ Add New

Show [10] entries   ⬆ Export ∨   Search:

S.NO	CODE TYPE	HSN/SAC CODE	DESCRIPTION	STATUS	ACTION
1	Hsn	996334	CATERING SERVICES IN EXHIBITION HALLS, EVENTS, MARRIAGE HALLS AND OTHER OUTDOOR/INDOOR FUNCTIONS.	Active	⋮
2	Hsn	27011100	COAL; BRIQUETTES, OVOIDS AND SIMILAR SOLID FUELS MANUFACTURED FROM COAL - COAL, WHETHER OR NOT PULVERISED, BUT NOT AGGLOMERATED: ANTHRACITE	Active	⋮
3	Sac	997132	LIFE INSURANCE SERVICES (EXCLUDING REINSURANCE SERVICES)	Active	⋮
4	Sac	999694	LOTTERY SERVICES	Active	⋮
5	Sac	997222	BUILDING SALES ON A FEE/COMMISSION BASIS OR CONTRACT BASIS	Active	⋮
6	Sac	996111	SERVICES PROVIDED FOR A FEE/COMMISSION OR CONTRACT BASIS ON WHOLESALE TRADE	Active	⋮
7	Hsn	27030090	PEAT (INCLUDING PEAT LITTER), WHETHER OR NOT AGGLOMERATED - PEAT (INCLUDING PEAT LITTER), WHETHER OR NOT AGGLOMERATED: OTHER	Active	⋮
8	Hsn	27101939	This is used for the testing purpose	Active	⋮
9	Hsn	94042910	HSN created for test purposes	Active	⋮
10	Hsn	123456	N/A	Active	⋮

Showing 1 to 10 of 11 entries   < **1** 2 >

HSN/SAC Home > Add New   ⊝ Back   ⊘ Create

Basic Information
Fill the details

Code Type *	● Hsn ○ Sac	Status
HSN/SAC Code *	27101939	● Active ○ Inactive
Name	AVIATION TURBINE FUELS, KEROSINE TYPE CONFORMING TO STANDARD IS 1571	

Tax Pattern
Fill the details

S.NO	From Price *	Upto Price *	Tax Group *	Effective From Date *	Action
1		999999999	GST_001 ✕ ∨	15-Jul-2025 📅	⊞

4.4.3.Term and Condition

Create and manage standard **commercial terms** used in:

- Sales Orders
- Purchase Orders
- Invoices
- Quotations

Supports multiple templates, auto-insertion, and formatting.

Terms and Conditions | Home > Terms and Conditions List | ⊕ Add New

Show 10 entries | ⬆Export ∨ | Search:

S.NO.	TITLE	STATUS	ACTION
1	New Template	Active	⋮

Showing 1 to 1 of 1 entries ‹ **1** ›

Edit Terms and Conditions | Home > Edit | ⊕ Back 🗑 Delete ⊘ Update

Term Name*

[New Template]

Term Detail*

| ✎▾ | **B** U̲ **B** | sans-serif ▾ | 14 ▾ | **A** ▾ | ☰ ☰ ☰▾ | T! ▾ | ⊞ ▾ | ⊖ 🖼 — </> ? ↶ ↷ |

- **Acceptance:** Vendor accepts the purchase order.
- **Scope of Work:** Clearly defines the goods or services to be provided.
- **Pricing:** Specifies the agreed-upon price.
- **Payment Terms:** Outlines payment schedule, due dates, and methods.
- **Delivery:** Details delivery date, location, and shipping terms.
- **Inspection:** Buyer reserves the right to inspect goods and reject nonconforming items.
- **Warranty:** Vendor guarantees goods or services meet quality standards.
- **Indemnification:** Vendor agrees to compensate buyer for losses due to their negligence.
- **Force Majeure:** Neither party is liable for delays caused by unforeseen circumstances.

- **Confidentiality:** Vendor maintains confidentiality of buyer's proprietary information.

Status   ● Active ○ Inactive

4.4.4.Discount Master

Set up various discount structures, including:

- Fixed %
- Slab-based
- Quantity or Value-based
- Promotional Schemes

Can be applied to customers, products, or categories automatically during transaction entry.

Discount Masters | Home > Discount Masters | ⊕ Add New

Show 10 entries | ⬆Export ∨ | Search:

S.NO.	NAME	ALIAS	PERCENTAGE	LEDGER	LEDGER GROUP	STATUS	ACTIONS
1	Weekly Discount	N/A	10.00	N/A	N/A	Inactive	⋮
2	Abc discount	Abc discount	1.00	N/A	N/A	Active	⋮

Discount Masters   Home > Discount Masters

S.NO.	NAME	ALIAS	PERCENTAGE	LEDGER	LEDGER GROUP	STATUS	ACTIONS
1	Weekly Discount	N/A	10.00	N/A	N/A	Inactive	⋮
2	Abc discount	Abc discount				Active	⋮
3	Loyalty Discount I	LCI			ers Groups	Active	⋮
4	New Discount one	N/A				Active	⋮
5	discounttt	discountt				Active	⋮
6	Monthly Discount	N/A				Inactive	⋮
7	discount V	dis				Active	⋮
8	New Discount	New Discount				Active	⋮
9	Discount	discount				Active	⋮

Showing 1 to 9 of 9 entries

Edit Discount Master

Enter the details below.

Name *
Weekly Discount

Alias
WD

Ledger
Test GST Led09

Ledger Group
Loans & Advances (Asset)

Percentage *
10.00

Applicable On
Is Purchase ☐   Is Sale ☐

Status
○ Active   ● Inactive
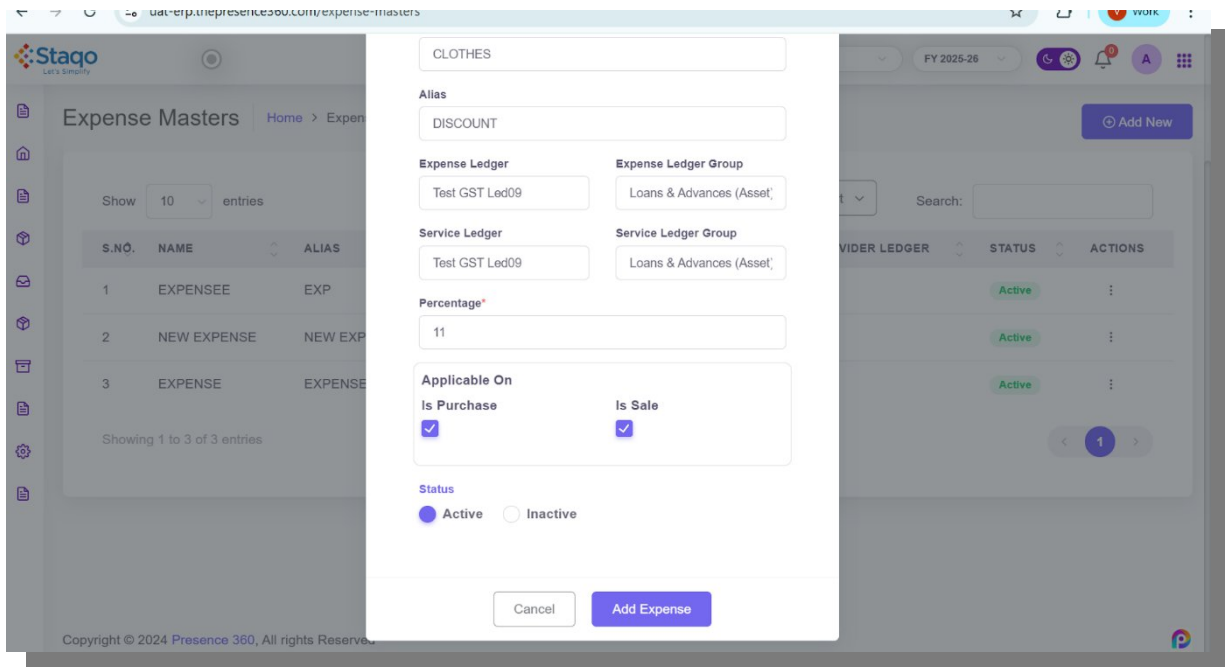
[Cancel]   [Update Discount]

4.4.5.Expense Master

Manage **additional charges** or **indirect costs** that apply to orders such as:

- Freight
- Loading/Unloading
- Packing Charges
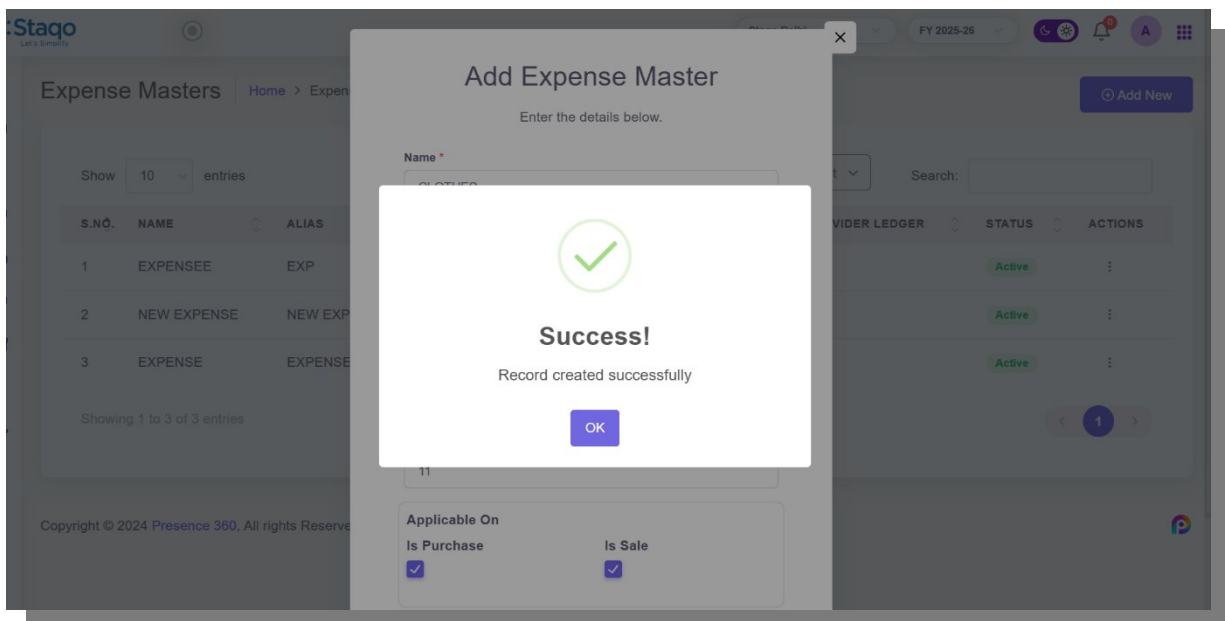- Insurance
- Customs Clearance

These can be assigned per transaction or defined as overheads in BOMs.

4.5. Common

4.5.1. Category

The **Category Master** in ERP Presence 360 allows us to define and manage categories for various types of master data such as **Items**, **Customers**, and **Vendors**. It helps in organizing data systematically using **Parent Categories** and **Sub-Categories** (Category Name). Each category can be marked as active/inactive and marked as the last level if it's the final node in the category hierarchy. This structure improves clarity, grouping, and reporting for all master data across the system.

Category Master | Home > Category List

Show 10 entries   ⬆Export ⌄   Search: [   ]

⊕ Add New

S.NO	PARENT CATEGORY	CATEGORY NAME	LAST LEVEL	STATUS	ACTION
1	N/A	MOULDED SOCKS	⊘	Active	⋮
2	N/A	LAMINATED FABRIC	⊘	Active	⋮
3	N/A	BACKER	⊘	Active	⋮
4	N/A	CONSUMABLE GOODS	⊘	Active	⋮
5	N/A	FOAM	⊘	Active	⋮
6	N/A	FABRIC	⊘	Active	⋮
7	SUB NEW HARDWARE CATEGORY	SEMI HARDWARE CATEGORY	⊘	Active	⋮
8	NEW HARDWARE CATEGORY	SUB NEW HARDWARE CATEGORY	-	Active	⋮
9	N/A	NEW HARDWARE CATEGORY	-	Active	⋮
10	MATERIAL	PRODUCT	⊘	Active	⋮

Showing 1 to 10 of 60 entries   ‹ **1** 2 3 4 5 6 ›

Staqo
Let's Simplify

Staqo Delhi ⌄   FY 2025-26 ⌄

Category | Home > Add New

⊖ Back   ⊘ Create

Basic Information
Fill the details

Type *	Customer ⌄	
Parent Group Name	CUST ⌄	
Group Name *	CLOTHES	
Group Initials*	CL	
Status	● Active ○ Inactive	

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4.5.2.Payment Terms

Defines credit policies and payment structures such as:

- Net 30 Days
- 50% Advance, 50% on Delivery
- COD (Cash on Delivery)

Linked with customer/vendor to ensure correct due date calculation and financial planning.

Payment Terms | Home > Payment Term List

⊕ Add New

Show 10 entries   ⬆Export ⌄   Search: [   ]

S.NO	NAME	ALIAS	STATUS	ACTION
1	NET 45 DAYS	NET 45 DAYS	Active	⋮
2	NET 30 DAYS	NET 30 DAYS	Active	⋮

Payment Terms | Home › Payment Terms › Edit

⊕ Back | 🗑 Delete | ⊘ Update

Edit Payment Term
Update the details

Title * NET 45 DAYS

Alias NET 45 DAYS

Status ● Active ○ Inactive

Installation No	Trigger Type	Payment Days	Payment %	Action
1	Advance	60	50.00	🗑 ⊞
2	On delivery	0	0.00	🗑
3	Post delivery	30	50.00	🗑
		Total Percent:	100.00	

4.5.3.Exchange Rates

Exchange Rates | Home › Exchange Rates

⊕ Add New

Show 10 entries   ⬆Export ⌄   Search:

S.NO.	FROM	TO	EXCHANGE RATE	EFFECTIVE FROM	ACTIONS
1	Euro	Indian rupee	97.11	2025-04-30	⋮
2	United States dollar	Indian rupee	80.00	2025-03-26	⋮

Showing 1 to 2 of 2 entries   ‹ 1 ›

Used for foreign currency transactions. Maintains currency conversion rates and auto-applies during:

- Import Purchases
- Export Sales
- Financial Reports

Also supports rate variance checks.

4.5.4.Bank Master

Maintains bank account details for:

- Customer Refunds
- Vendor Payments
- Cheque / NEFT / RTGS transactions
- Bank Reconciliation

Details include account number, IFSC, branch, and bank name.

Bank Master Home > Bank List   [⊕ Add New]

Show [10 ⌄] entries   [⬆Export ⌄]   Search: [_____]

S.NO	BANK NAME	BANK CODE	STATUS	ACTION
1	KOTAK BANK	KOTAK001	Active	⋮
2	HDFC BANK	123	Active	⋮

Showing 1 to 2 of 2 entries   ‹ ① ›

User can map the ledger bank wise or account wise to get the financial reports.

Edit Bank Details   Home > Edit   [⊕ Back] [🗑 Delete] [⊘ Update]

Basic Information
Edit the details

Bank Name *	KOTAK BANK
Bank Code *	KOTAK001
Ledger	KOTAK BANK
Ledger Group	Bank Accounts
Status	● Active ○ Inactive

S.NO	Account Number	IFSC Code	Branch Name	Branch Address	Ledger Name	Ledger Group	Action
1	0918234756	KKBK0000180	NOIDA	KOTAK MAHINDRA BANK	KOTAK BANK	Bank Accounts	⊞

5. Configuration
5.1.1. Series

The Series acts as the foundational setup for controlling document behavior across modules. It is used to define key configurations such as Numbering Pattern, Approval Workflow, and Amendment Rules.

- User Can define the "N" number of level of approval flow with amount restrictions.
- User Can define that who can amend that particular series and approval request or not after amendment.
- User can also define the common parameters.
- User can define the financial parameters for the financial posting

Series Master | Home > Series List

Show 10 entries

Export ∨   Search:

SR. NO	SERVICE	SERIES CODE	SERIES NAME	MANUAL ENTRY	STATUS	ACTION
1	Fixed Asset Revaluation/Impairment	REVALUATION	REVALUATION	Yes	Active	⋮
2	Advance Shipment Notification	ASN002	Advance Shipment Notification	Yes	Active	⋮
3	Lorry Receipt	LR	Lorry Receipt	Yes	Active	⋮
4	Gate Entry	GATEENTRYPRIORITY	gate entry	Yes	Active	⋮
5	Purchase Voucher	MRNPRIORITY	MRNPRIORITY	No	Active	⋮
6	MRN	MRNPRIORITY	material receipt	Yes	Active	⋮
7	Sales Order	SLORDER	Sales Order	Yes	Active	⋮
8	Advance Shipment Notification	ASN001	ASN	Yes	Active	⋮
9	Advance Shipment Notification	ASN	Advance Shipment Notification	Yes	Active	⋮
10	Job Order	JORDER	Job Order	Yes	Active	⋮

Showing 1 to 10 of 215 entries

< 1 2 3 4 5 ... 22 >

Edit Series | Home > Series > Edit Series

Back   Submit

Basic Information
Fill the details

Service*   LORRY RECEIPT (LR)

Series Code *   LR

Series Name *   Lorry Receipt

Manual Entry Allowed?*   ● Yes   ○ No

Status
● Active   ○ Inactive

Numbering Pattern | Approval | Amendment | Common Parameters | Dynamic Fields

#	Company Name*	Unit Name*	Numbering Type*	Reset Pattern	Prefix	Suffix	Starting No.	Action
1	Infosys	Stago Delhi	Auto	Never			1	⊞

5.1.2.Locations

Defines **primary business locations** such as factories, warehouses, offices, etc.
Used for:

- Inventory tracking
- Production planning
- Delivery & dispatch points

Each location can be linked to a company and department for better segregation.

Location Master | Home > Location List | ⊕ Add New

Show [7] entries   ⬆ Export ⌄   Search: [   ]

S.NO	ORGANIZATION	LOCATION CODE	LOCATION NAME	RACKS	SHELFS	CONTACT PERSON	STATUS	ACTION
1	Staqo Delhi	DELHI1	DELHI	N/A	N/A	N/A	Active	⋮
2	Staqo Delhi	GURGAON001	GURGAON	N/A	N/A	N/A	Active	⋮
3	Staqo Delhi	NOIDA137	NOIDA137	N/A	N/A	N/A	Active	⋮
4	Staqo Delhi	NOIDA1	NOIDA	N/A	N/A	N/A	Active	⋮

Showing 1 to 4 of 4 entries   ‹ 1 ›

Edit Location | Home > Edit Location   ⊕ Back   🗑 Delete   ⊙ Update

Basic Information
Fill the details

Organization*	Staqo Delhi		Status ● Active ○ Inactive
Location Code *	DELHI1		
Location Name *	DELHI		
Contact Person	TANMAY SHARMA		
Contact Phone No.	8585911783		
Contact Email-ID	tanmay.sharma@staqo.com		

Address*
Country	State	City	Address	Pin Code
India	Telangana	Hyderabad	SURVEY NO. 41, POCHARAM V	500088

Mapping with Rack and Shelf   Mapping with Bin   ⊞ Add Rack   ⊞ Add Shelf   ⊞ Add Bin

S.NO.	Rack Name	Shelf	Action
+ Add New			

5.1.3.Sub Locations

Sub Location Master | Home > Sub Location List | ⊕ Add New

Show [7] entries   ⬆ Export ⌄   Search: [   ]

S.NO	NAME	ALIAS	TYPE	SUB TYPE	LOCATION(S)	STATUS	ACTION
1	TIMEFRAME GN STORE	TFGNST	Vendor		NOIDA, NOIDA137, GURGAON, DELHI	Active	⋮
2	GURGAON	CYBER PARK	Stock	Main	GURGAON	Active	⋮
3	NOIDA SECTOR 18	NOIDA SECTOR 18	Stock	Main	NOIDA	Active	⋮
4	DWARKA SECTOR 15	DWARKA	Stock	Main	DELHI	Active	⋮
5	BOTANICAL GARDEN	GARDEN	Shop floor		NOIDA	Active	⋮

Showing 1 to 5 of 5 entries   ‹ 1 ›

- Storage Rooms
- Individual Assembly Stations
- Section-wise divisions (e.g., Cutting, Lamination, QC)

Helps in micro-level tracking of inventory and activities.

5.1.4.Dynamic fields

Allows you to customize forms and add additional fields as per your process needs.
You can:

- Add custom text, number, date, dropdown fields
- Apply validations
- Link to specific modules (e.g., Item Master, Sales Order)

Helps in adapting the ERP to unique business requirements without coding.

5.1.5.Users
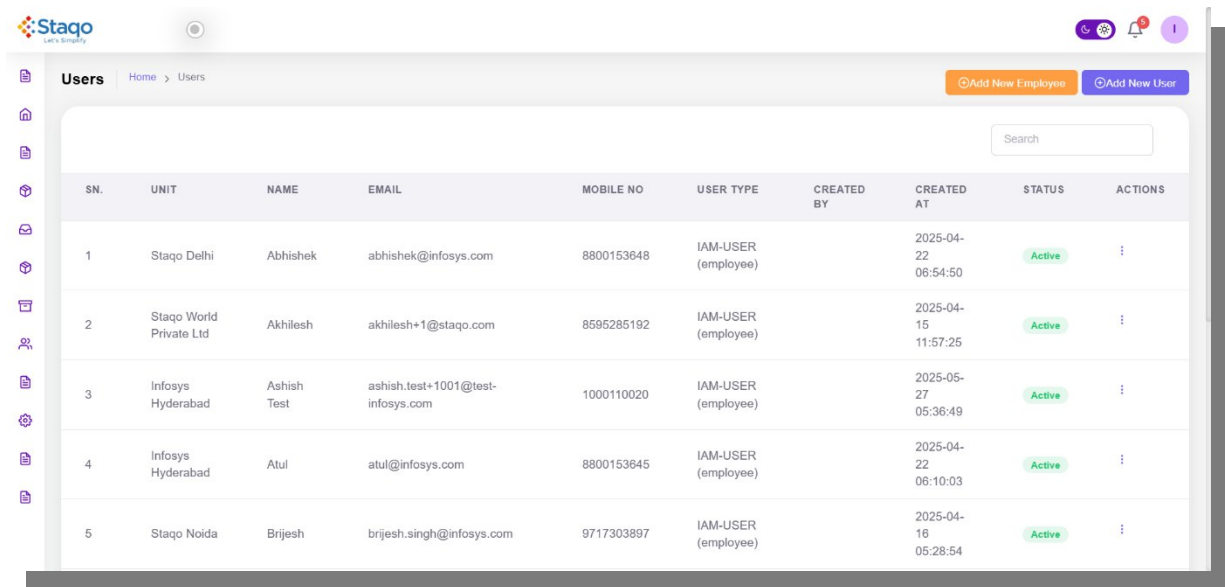
Used to create and manage **system users (employees)** who can access the ERP system.
Details include:

- Name, Role, Email
- Login credentials
- Assigned location & organization

Every user can be given restricted access based on their role to maintain data security.

- User can add the user for employee, admin and vendor.
- User can map the org, location, sub-location and assign the role and rights for the particular module.
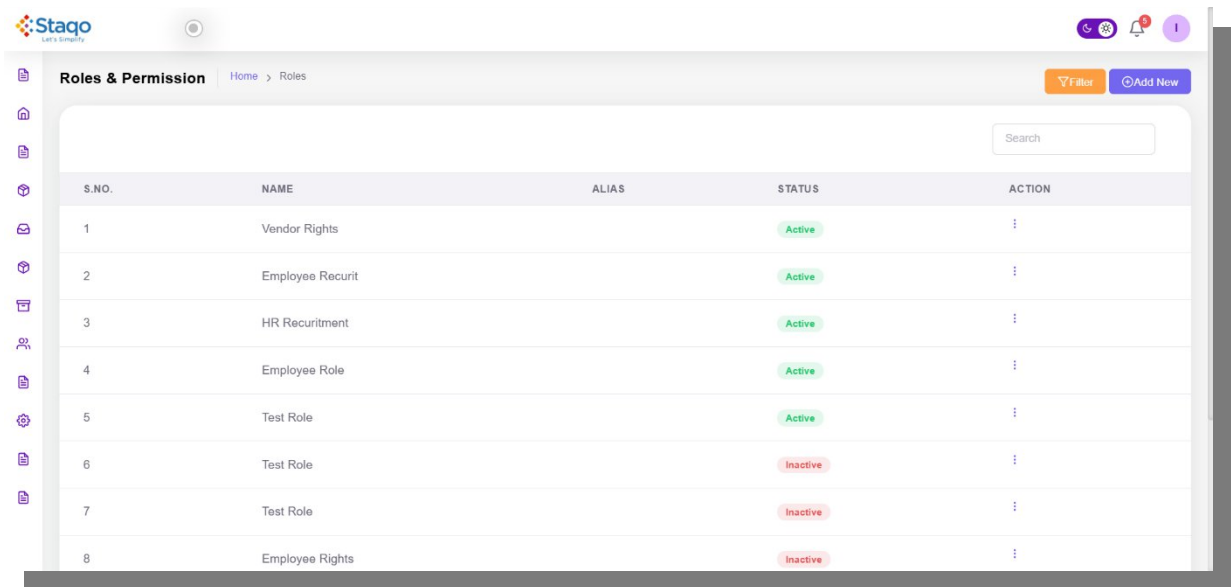
SN.	UNIT	NAME	EMAIL	MOBILE NO	USER TYPE	CREATED BY	CREATED AT	STATUS	ACTIONS
1	Staqo Delhi	Abhishek	abhishek@infosys.com	8800153648	IAM-USER (employee)		2025-04-22 06:54:50	Active	⋮
2	Staqo World Private Ltd	Akhilesh	akhilesh+1@staqo.com	8595285192	IAM-USER (employee)		2025-04-15 11:57:25	Active	⋮
3	Infosys Hyderabad	Ashish Test	ashish.test+1001@test-infosys.com	1000110020	IAM-USER (employee)		2025-05-27 05:36:49	Active	⋮
4	Infosys Hyderabad	Atul	atul@infosys.com	8800153645	IAM-USER (employee)		2025-04-22 06:10:03	Active	⋮
5	Staqo Noida	Brijesh	brijesh.singh@infosys.com	9717303897	IAM-USER (employee)		2025-04-16 05:28:54	Active	⋮

5.1.6.Roles and Permissions

This section is for access control. You can:

- Create roles (Admin, Operator, Store Manager, Finance Executive, etc.)
- User can define the permissions module wise

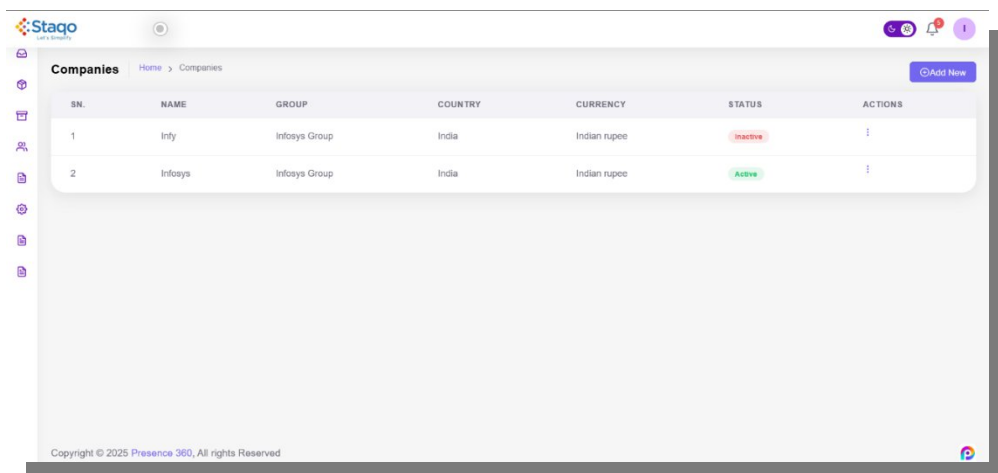Critical for data security, workflow control, and user accountability.

5.1.7.Companies

The **Companies** section in ERP Presence 360 allows you to define and manage multiple legal business entities in the system.
Key Fields:

- **Company Name**: Official name of the business.
- **Currency**: Default operating currency (e.g., INR, USD).
- **Country**: Country of registration.
- **Status**: Mark the company as *Active* or *Inactive*.

5.1.8.Organization

In organization info, Financial year, parameter for Depreciation are mandatory organizations wise.

This screen is used to define and manage an **organization** under a specific company within the ERP system. It includes the following fields:

- **Group** – Refers to the parent corporate group (e.g., Infosys Group) to which the organization belongs.
- **Company** – Select the specific company under which this organization operates.
- **Name & Alias** – Define the official name and an internal short name for easy reference.
- **Logo** – Upload the branding logo of the organization.
- **Status** – Choose whether the organization is currently **Active** or **Inactive**.

Additional Tabs

1. **Org. Info**
   Basic organizational details like country, currency, and identification.
2. **Addresses**
   You can define multiple addresses such as head office, branch locations, or billing/shipping addresses. These are essential for documents, logistics, and communication.
3. **Compliances**
   Define statutory and legal compliances specific to the organization such as GSTIN, PAN, registration numbers, etc.
4. **Financial Years**
   Allows you to define the financial year duration for the organization, which is critical for accounting and reporting.
5. **E-Invoice**
   Configure e-invoicing parameters, like API details, credentials, or IRP (Invoice Registration Portal) preferences — required for GST compliance in India.
6. **Parameters**
   Set various internal controls, configuration settings, or operational flags that tailor ERP behavior for the organization.

****************************END OF DOCUMENT****************************