

7/17/2025

Presence360 ERP User Manual- Sales Module

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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. Presence360 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

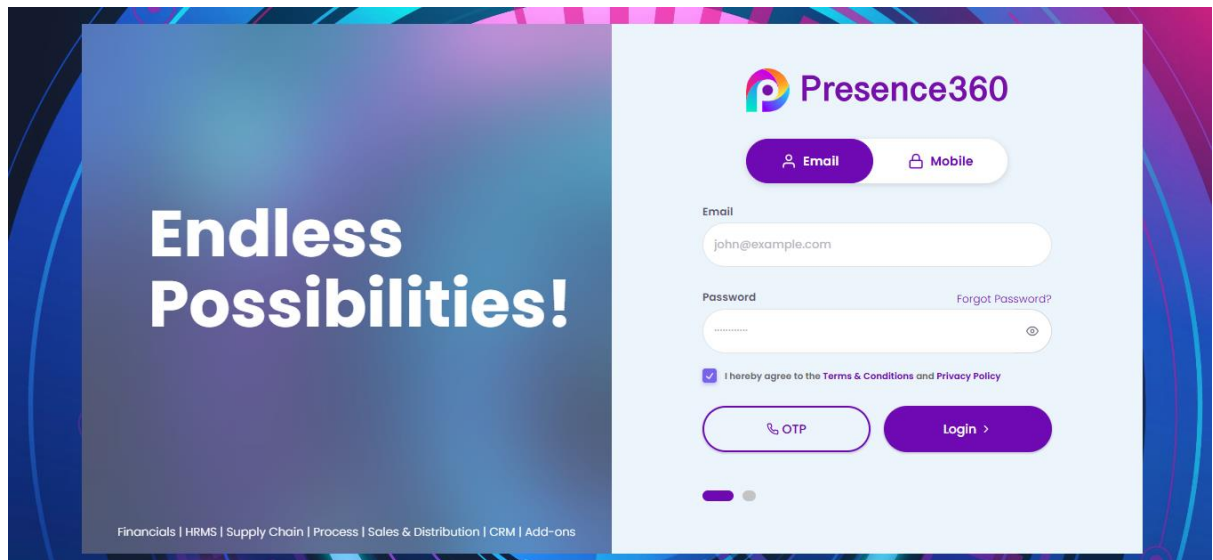
- Type the password associated with your account.
- Click the “eye” icon if you want to view the password while typing.

Click on the ‘Login’ Button

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

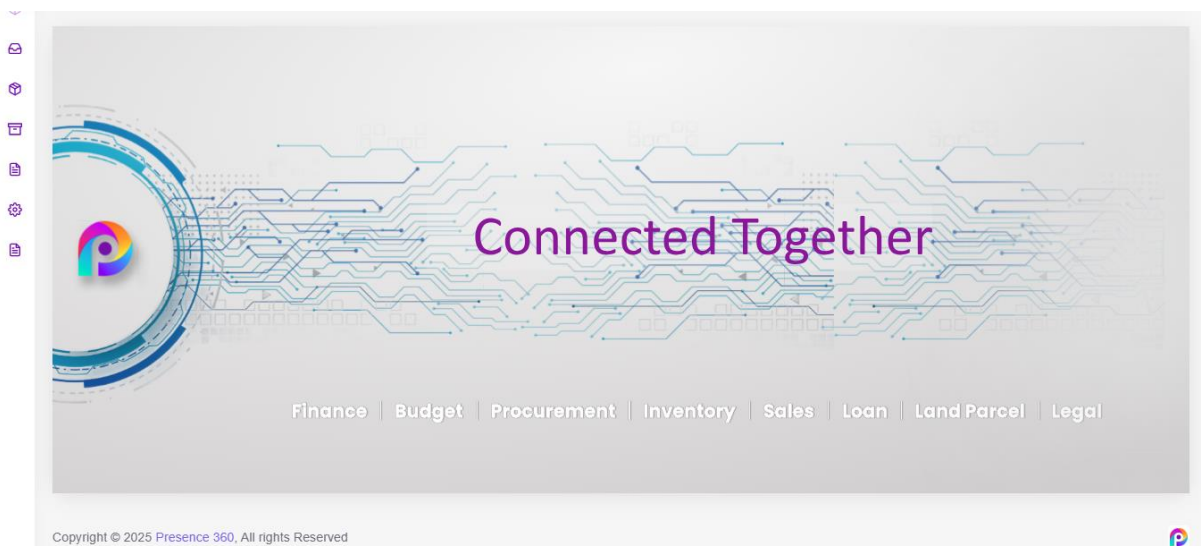
Two-Factor Authentication

- If 2FA is active, you will receive an OTP via email or SMS.
- Enter the OTP to complete verification.



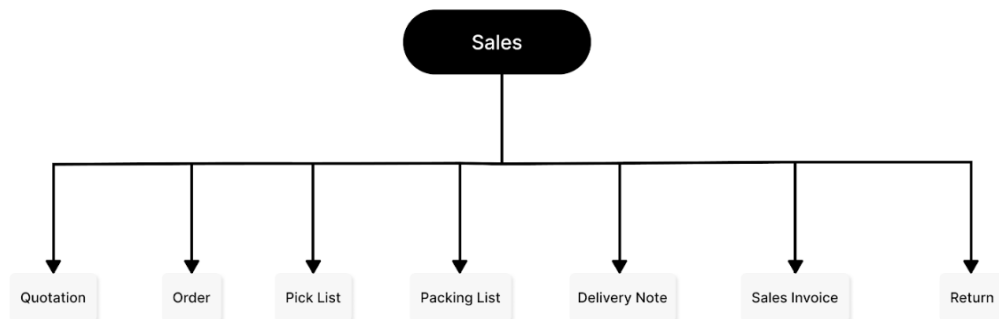
Access Granted

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



4. Sales Module

Flow Chart of Sales Module



Introduction to Sales module:

The **Sales Module** helps businesses manage and track their entire sales process — from customer inquiries to final invoicing.

This module is designed to streamline sales activities, improve customer service, and ensure that every sales transaction is recorded accurately. It connects with other modules like Inventory, Finance, and Customer Relationship Management (CRM) to give a complete view of your sales operations.

The Sales Module process- Quotation>Sales Order>Delivery Note/Sales Invoice>Packing List>Sales Return>Transporter Request

4.1. Sales Quotation

The **Sales Quotation** module allows users to create and manage price offers for customers before a sale is finalized.

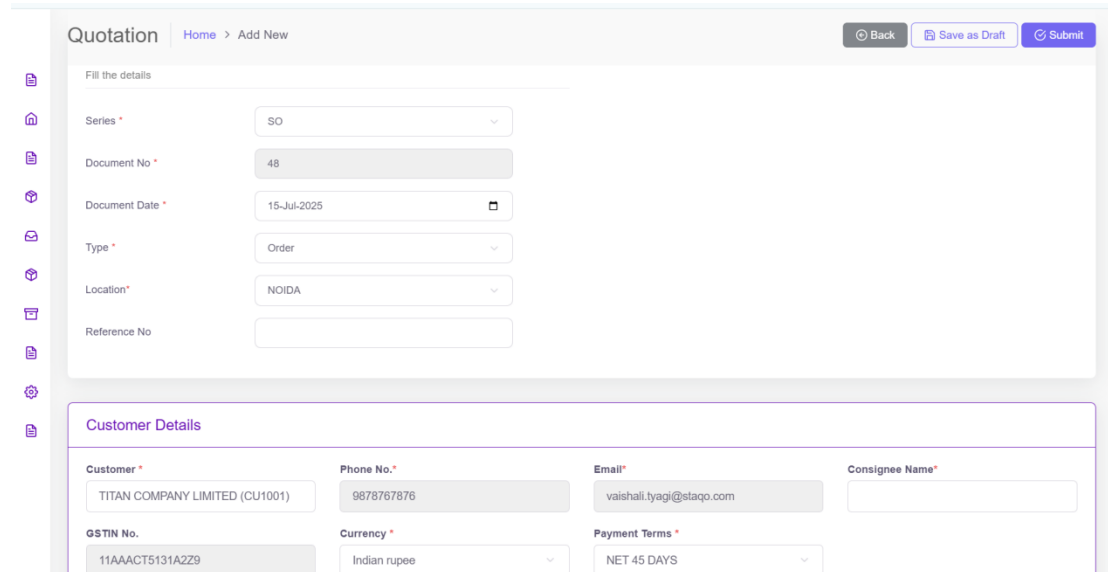
A quotation includes item details, pricing, taxes, terms, and validity. Once reviewed and approved by the customer, a quotation can be directly converted into a **Sales Order**, reducing manual entry and ensuring accuracy.

This module helps streamline the pre-sales process, maintain a record of customer negotiations, and supports version control if revisions are made.

Navigation: Sales>Quotation>Create

Basic details to be filled for creating a sales quotation:

- User needs to enter series no., document no., doc. Date, type, location, reference no. (if required)
- User needs to provide customer details like phone no., email, consignee name, currency, payment terms
- After entering customer name other details will be auto populated
- User needs to enter item details
- User can add expense and discount as well
- User can delete or copy the items as well



Quotation Home > Add New

Back Save as Draft Submit

Fill the details

Series * SO

Document No * 48

Document Date * 15-Jul-2025

Type * Order

Location * NOIDA

Reference No

Customer Details

Customer * TITAN COMPANY LIMITED (CU1001)

Phone No.* 9878767876

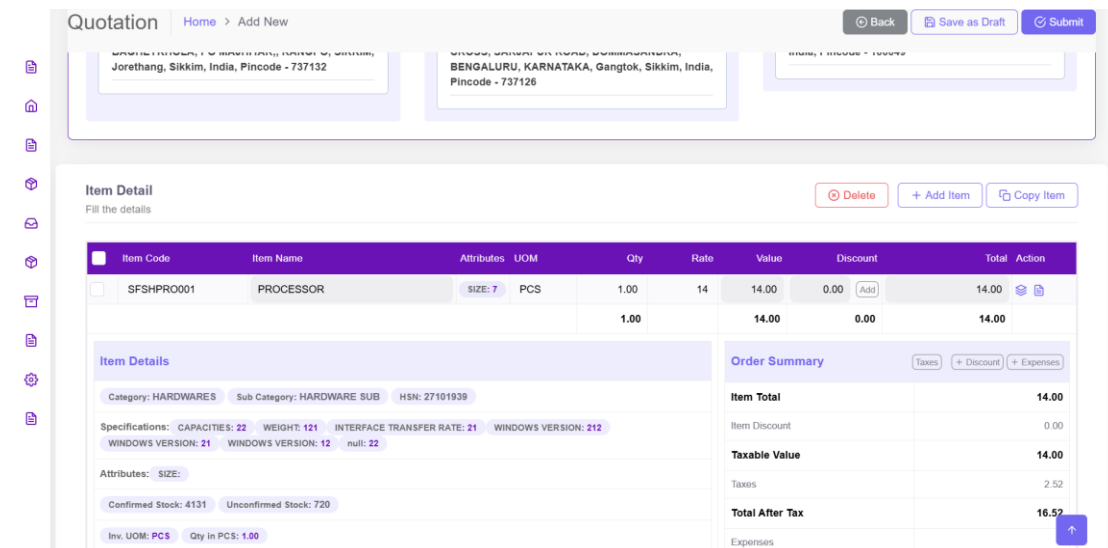
Email* vaishali.tyagi@staqo.com

Consignee Name*

GSTIN No. 11AAACT5131A229

Currency * Indian rupee

Payment Terms * NET 45 DAYS



Quotation Home > Add New

Back Save as Draft Submit

Address: Jorethang, Sikkim, India, Pincode - 737132

Address: BENGALURU, KARNATAKA, Gangtok, Sikkim, India, Pincode - 737126

Item Detail Fill the details

Delete + Add Item + Copy Item

Item Code	Item Name	Attributes	UOM	Qty	Rate	Value	Discount	Total	Action
SFSHPRO001	PROCESSOR	SIZE: 7	PCS	1.00	14	14.00	0.00	14.00	
				1.00		14.00	0.00	14.00	

Item Details

Category: HARDWARES Sub Category: HARDWARE SUB HSN: 27101939

Specifications: CAPACITIES: 22 WEIGHT: 121 INTERFACE TRANSFER RATE: 21 WINDOWS VERSION: 212
WINDOWS VERSION: 21 WINDOWS VERSION: 12 null: 22

Attributes: SIZE:

Confirmed Stock: 4131 Unconfirmed Stock: 720

Inv. UOM: PCS Qty in PCS: 1.00

Order Summary Taxes + Discount + Expenses

Item Total	14.00
Item Discount	0.00
Taxable Value	14.00
Taxes	2.52
Total After Tax	16.52
Expenses	

- Stock details are also available in **Item details**: Action: **Stocks** icon to validate the available stock according to location, store, org.

Quotation Home > Add New

Back Save as Draft

Stock Details

Organization Location Store Item

Select Select Select Select

Item Code	Item Name	Attributes	UOM	Organization	Location	Store	Confirmed Stock	Unconfirmed Stock
SFSHPRO001	PROCESSOR		PCS	Staqa Delhi	Noida	Noida Sector 18	1,100.00	620.00
SFSHPRO001	PROCESSOR		PCS	Staqa Delhi	Gurgaon	Gurgaon	200.00	0.00
SFSHPRO001	PROCESSOR		PCS	Staqa Delhi	Delhi	Dwarka Sector 15	2,620.00	0.00
RMSHRMO001	RAW MATERIAL ONE	RED SIZE: 7	PCS	Staqa Delhi	Noida	Noida Sector 18	8,941.00	0.00
RMSHRMO001	RAW MATERIAL ONE	RED SIZE: 7	PCS	Staqa Delhi	Gurgaon	Gurgaon	0.00	0.00
RMSHRMO001	RAW MATERIAL ONE	RED SIZE: 7	PCS	Staqa Delhi	Delhi	Dwarka Sector 15	0.00	0.00
RMSHRMT001	RAW MATERIAL TWO	RED SIZE: 7	PCS	Staqa Delhi	Noida	Noida Sector 18	0.00	0.00
RMSHRMT001	RAW MATERIAL TWO	RED SIZE: 7	PCS	Staqa Delhi	Gurgaon	Gurgaon	0.00	0.00
RMSHRMT001	RAW MATERIAL TWO	RED SIZE: 7	PCS	Staqa Delhi	Delhi	Dwarka Sector 15	0.00	0.00
RMSHRMT002	RAW MATERIAL THREE	RED SIZE: 7	PCS	Staqa Delhi	Noida	Noida Sector 18	6,940.00	0.00
RMSHRMT002	RAW MATERIAL THREE	RED SIZE: 7	PCS	Staqa Delhi	Gurgaon	Gurgaon	0.00	0.00
RMSHRMT002	RAW MATERIAL THREE	RED SIZE: 7	PCS	Staqa Delhi	Delhi	Dwarka Sector 15	0.00	0.00

- Save or submit the quotation

Quotation Home > Add New

Back Save as Draft Submit

Customer Details

Customer * Phone No.* Email* Consignee Name*

TITAN COMPANY LIMITED (CU1001) 9878767876 vaishali.tyagi@staqa.com

GSTIN No. 11AACT5131A2Z9

Billing Address *

NH31, TITAN COMPANY LTD, WATCH DIVISION, BAGHEYKHOLA, PO MAJHITAR, RANGPO, SIKKIM Jorethang, Sikkim, India, Pincode - 737132

Pickup Address *

STAQA WORLD PRIVATE LTD, New Delhi, Delhi, India, Pincode - 100049

Item Detail

Fill the details

Delete + Add Item Copy Item

Item Code	Item Name	Attributes	UOM	Qty	Rate	Value	Discount	Total	Action
SFSHPRO001	PROCESSOR	SIZE: 7	PCS	1.00	14	14.00	0.00	14.00	

Sales Quotation submitted successfully

The screenshot shows the 'Quotation' form in the Staago system. The top navigation bar includes 'Staago Let's Simplify', 'Staago Delhi', and a date filter 'F-Y 2025-26'. The form is titled 'Quotation' with a breadcrumb 'Home > Add New'. It features a 'Status: Approved' indicator in green. The 'Basic Information' section includes fields for Series (SO), Document No (48), Document Date (15-Jul-2025), Type (Order), Location (NOIDA), and Reference No. An 'Approval History' panel on the right shows a single entry for 'Atul' on '15-07-2025' with a 'Submit' button. The 'Customer Details' section at the bottom includes fields for Customer, Phone No, Email, and Consignee Name.

Sales Quotation submitted and approved successfully

Approval:

Approver's login:

Navigate to: Sales>Approvals>Sales Quotation (if approval is required)

- Now user will be able to approve the transaction if Approver name is defined in series else it will be auto approved
- User will be able to print the transaction

This is a duplicate of the screenshot above, showing the 'Quotation' form in the Staago system. It displays the 'Basic Information' and 'Customer Details' sections, with the status 'Approved' and an 'Approval History' panel.

- Sales Quotation status will be shown on listing page:
Approved, draft, submitted, rejected

Stago Let's Simplify

Stago Delhi FY 2025-26

Quotation Home > List

Filter Create Quotation Report

Show 10 entries Export Search:

S.NO	DATE	SERIES	DOC NO.	TYPE	LOCATION	REV NO	REF NO	CUSTOMER	ITEMS	CURR	STATUS
1	15/07/2025	SO	48	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED	1	INR	Approved
2	15/07/2025	DYNAMICSO	63	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED	1	INR	Approved
3	15/07/2025	DYNAMICSO	62	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED	1	INR	Approved
4	15/07/2025	DYNAMICSO	61	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED	1	INR	Approved
5	15/07/2025	DYNAMICSO	60	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED	1	INR	Draft
6	13/06/2025	SQDYNAMIC	1	Order	NOIDA1	0	N/A	TATA	1	INR	Approved

- Sales Quotation can be filtered by entering customer, series, doc no. etc

Stago Let's Simplify

Stago Delhi

Quotation Home > List

Show 10 entries Export

S.NO	DATE	SERIES	DOC NO.	TYPE	LOCATION	REV NO	REF NO	CUSTOMER
1	15/07/2025	SO	48	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED
2	15/07/2025	DYNAMICSO	63	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED
3	15/07/2025	DYNAMICSO	62	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED
4	15/07/2025	DYNAMICSO	61	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED
5	15/07/2025	DYNAMICSO	60	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED
6	13/06/2025	SQDYNAMIC	1	Order	NOIDA1	0	N/A	TATA

Apply Filter

Customer
TITAN COMPANY LIMITED

Series
SO

Doc No
Search

Delivery Date

Item Category
Select

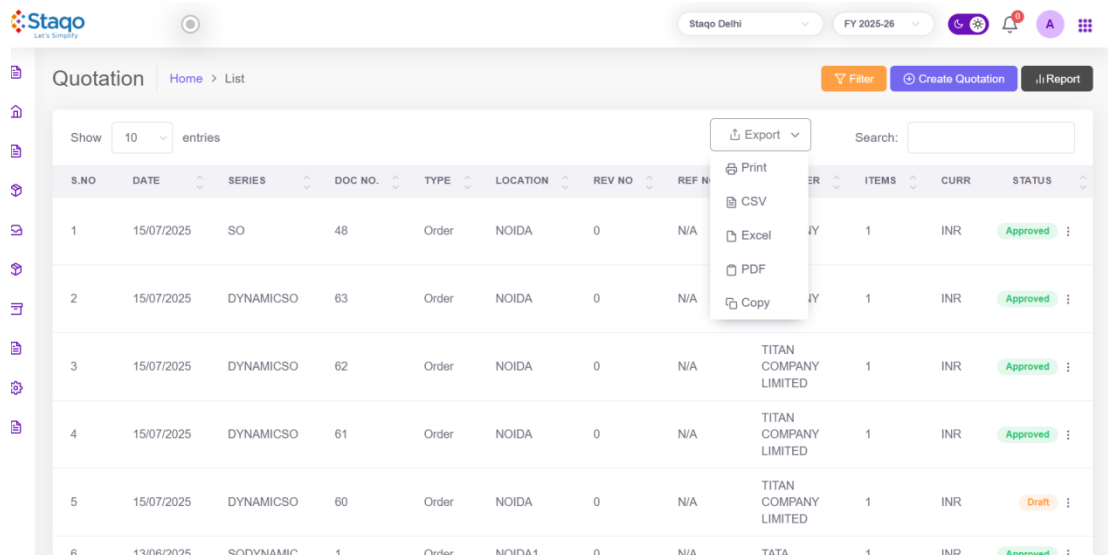
Item Sub Category
Select

Items
Select

Status
Select

Company

- Can be export to:
Print, csv, excel, pdf, copy



S.NO	DATE	SERIES	DOC NO.	TYPE	LOCATION	REV NO	REF NO	ITEM	CURR	STATUS
1	15/07/2025	SO	48	Order	NOIDA	0	N/A		INR	Approved
2	15/07/2025	DYNAMICSO	63	Order	NOIDA	0	N/A		INR	Approved
3	15/07/2025	DYNAMICSO	62	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED	INR	Approved
4	15/07/2025	DYNAMICSO	61	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED	INR	Approved
5	15/07/2025	DYNAMICSO	60	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED	INR	Draft
6	13/06/2025	SQDYNAMIC	1	Order	NOIDA1	0	N/A	TATA	INR	Approved

4.2. Sales Order

The **Sales Order** module is used to capture confirmed customer orders based on approved quotations or direct entries.

It may also be created via Purchase Order Or Job Order of other organizations within a same company to easily maintain and deliver items to customer from different locations/ organizations where stock is available.

Sale Order includes item details, quantities, pricing, taxes, and schedules. The module ensures traceability from quotation to order fulfillment and supports multi-level approval workflows if required.

Navigation: Sales>Order>Create

Basic details to be filled for creating a Sales Order:

- User needs to enter series no., document no., doc. Date, type, location, reference no. (if required), reference from (either **Quotation, Inter-Company PO, Inter-Company JO**)
- User needs to provide customer details like phone no., email, consignee name, currency, payment terms
- After entering customer name other details will be auto populated is customer is regular customer
- If customer is Cash customer Phone no., email, consignee name all these details has to be filled manually
- User needs to enter item details
- User can add expense and discount as well
- User can delete or copy the items as well
- User will be able to view or select the delivery date
- User will be able to upload the documents

- **Action Items:**

- Delivery schedule: multiple delivery dates can be entered as per the quantity

Delivery Schedule

Delivery Quantity* Delivery Date* 15-Jul-2025

S.No	Quantity	Date	Action
1	1	15/7/2025	
2	1	15/7/2025	
Total	2.00		

Cancel Submit

- BOM: user can view Bill of material at sales order creation page only

Bill of Material

Item Code	Item Name	UOM	Attributes	Qty	Action
STATION A					
RMSHRMO001	RAW MATERIAL ONE	PCS	COLOUR: RED SIZE: 7	2.000000	
STATION B					
RMSHRMT001	RAW MATERIAL TWO	PCS	COLOUR: RED SIZE: 7	2.000000	
STATION C					
RMSHRMT002	RAW MATERIAL THREE	PCS	COLOUR: RED SIZE: 7	2.000000	

- Stocks: Stock details are also available in **Item details: Action: Stocks icon** to validate the available stock according to location, store, org.

uat-erp.thepresence360.com/sales-order/create

Stock Details

Organization: Select Location: Select Store: Select Item: Select

Item Code	Item Name	Attributes	UOM	Organization	Location	Store	Confirmed Stock	Unconfirmed Stock
SFSHPRO001	PROCESSOR	SIZE : 7	PCS	Staqo Delhi	NOIDA	NOIDA SECTOR 18	100.00	610.00
SFSHPRO001	PROCESSOR	SIZE : 7	PCS	Staqo Delhi	GURGAON	GURGAON	200.00	0.00
SFSHPRO001	PROCESSOR	SIZE : 7	PCS	Staqo Delhi	DELHI	DWARKA SECTOR 15	2,400.00	0.00
RMSHRMO001	RAW MATERIAL ONE	RED SIZE : 7	PCS	Staqo Delhi	NOIDA	NOIDA SECTOR 18	8,941.00	0.00
RMSHRMO001	RAW MATERIAL ONE	RED SIZE : 7	PCS	Staqo Delhi	GURGAON	GURGAON	0.00	0.00
RMSHRMO001	RAW MATERIAL ONE	RED SIZE : 7	PCS	Staqo Delhi	DELHI	DWARKA SECTOR 15	0.00	0.00
RMSHRMT001	RAW MATERIAL TWO	RED SIZE : 7	PCS	Staqo Delhi	NOIDA	NOIDA SECTOR 18	0.00	0.00
RMSHRMT001	RAW MATERIAL TWO	RED SIZE : 7	PCS	Staqo Delhi	GURGAON	GURGAON	0.00	0.00
RMSHRMT001	RAW MATERIAL TWO	RED SIZE : 7	PCS	Staqo Delhi	DELHI	DWARKA SECTOR 15	0.00	0.00
RMSHRMT002	RAW MATERIAL THREE	RED SIZE : 7	PCS	Staqo Delhi	NOIDA	NOIDA SECTOR 18	6,940.00	0.00

Inv. UOM: PCS Qty in PCS: 2.00 Total After Tax 33.04

➤ Remarks: user can add or edit remarks

Order Home > Add New

NH31, TITAN COMPANY LTD, WATCH DIVISION, BAGHEYKHOLA, PO MAJHITAR, RANGPO, SIKKIM, Jorethang, Sikkim, India, Pincode - 737132

SHOP NO 4, 230/1, N R COMPLEX, MUTTANALLUR CROSS, SARJAPUR ROAD, DOMMASANDRA, BENGALURU, KARNATAKA, Gangtok, Sikkim, India, Pincode - 737126

STAQO WORLD PRIVATE LTD, New Delhi, Delhi, India, Pincode - 100049

Add/Edit Remarks

Enter the details below.

Remarks

sales order

Cancel Submit

Item Detail

Fill the details

Item Code	Item Name	Total	Delivery Date	Action
SFSHPRO001	PROCESSOR	28.00	15-Jul-2025	Delete Add Item Copy Item
		28.00		

Item Details

Specifications: CAPACITIES: 22 WEIGHT: 121 INTERFACE TRANSFER RATE: 21 WINDOWS VERSION: 212
WINDOWS VERSION: 21 WINDOWS VERSION: 12 null: 22

Attributes: SIZE: 7

Confirmed Stock: 2720 Unconfirmed Stock: 610

Inv. UOM: PCS Qty in PCS: 2.00

Item Total 28.00
Item Discount 0.00
Taxable Value 28.00
Taxes 5.04
Total After Tax 33.04

Staqo ERP & Inventory

Staqo Delhi FY 2025-26

Order Home > Add New

Back Save as Draft Submit

Basic Information

Fill the details

Series * SO

Document No * 49

Document Date * 15-Jul-2025

Type * Order

Location * NOIDA

Reference No

Reference From Quotation Inter-Company PO Inter-Company JO

Order Home > Add New

Back Save as Draft Submit

Item Detail

Fill the details

Delete + Add Item + Copy Item

Item Code	Item Name	Attributes	UOM	Qty	Rate	Value	Discount	Total	Delivery Date	Action
SFSHPRO001	PROCESSOR	SIZE: 7	PCS	14	0.00	0.00	0.00	0.00	15-Jul-2025	
				0.00		0.00	0.00	0.00		

Item Details

Specifications: CAPACITIES: 22 WEIGHT: 121 INTERFACE TRANSFER RATE: 21 WINDOWS VERSION: 212

WINDOWS VERSION: 21 WINDOWS VERSION: 12 null: 22

Attributes: SIZE: 7

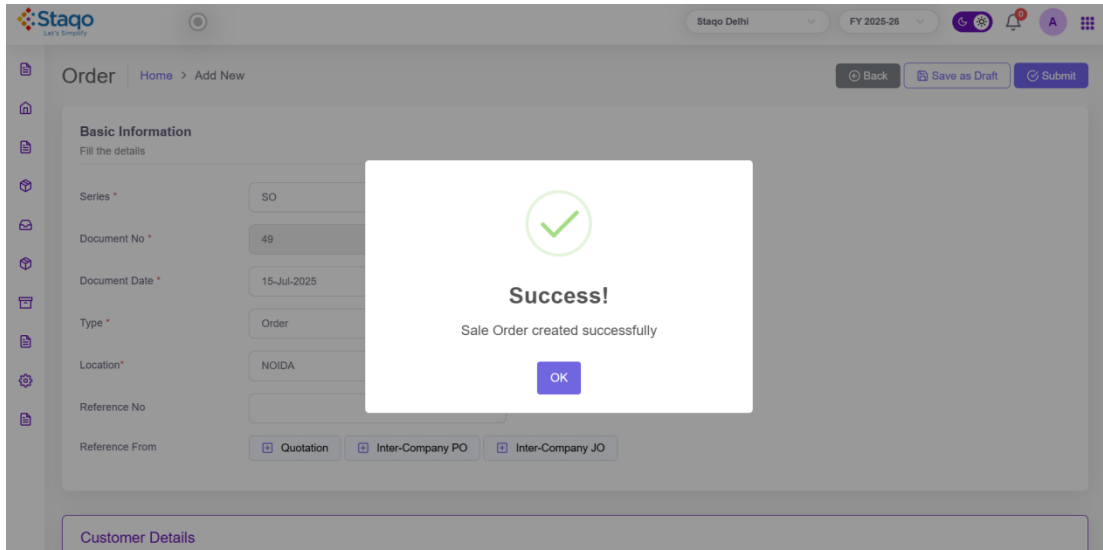
Confirmed Stock: 2720 Unconfirmed Stock: 610

Order Summary

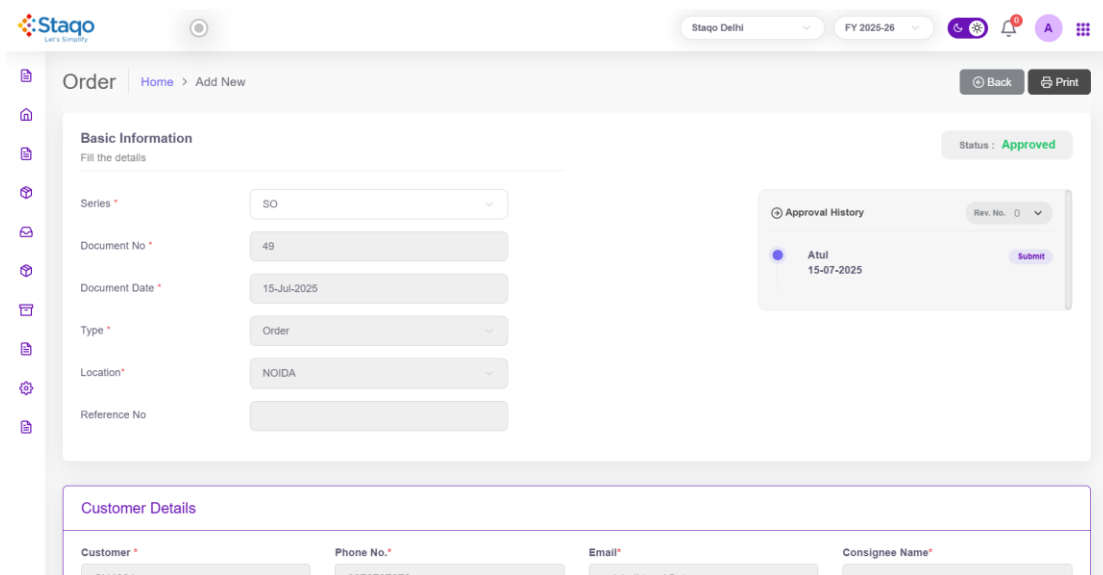
Taxes + Discount + Expenses

Item Total	0.00
Item Discount	0.00
Taxable Value	0.00
Taxes	0
Total After Tax	0.00
Expenses	0
Grand Total	0.00

- Save or submit the sales order



Sales Order submitted successfully



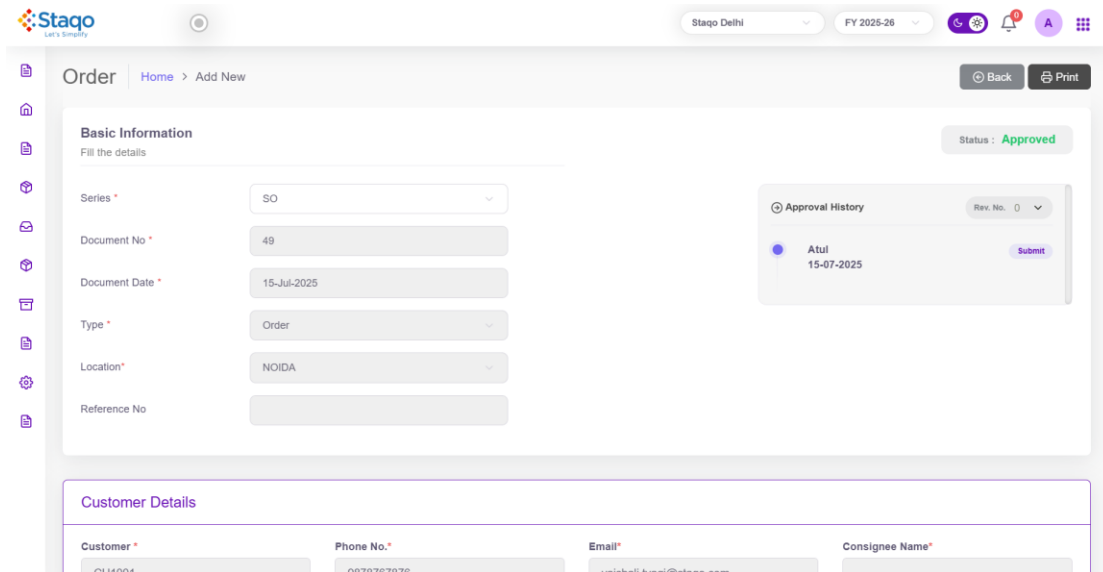
Sales Order submitted and approved successfully

Approval:

Approver's login:

Navigate to: Sales>approvals>Sales Order(if approval is required)

- Now user will be able to approve the transaction if approver name is defined in series else it will be auto approved
- User will be able to print the transaction



Order Home > Add New

Status: **Approved**

Basic Information
Fill the details

Series * SO

Document No * 49

Document Date * 15-Jul-2025

Type * Order

Location * NOIDA

Reference No

Approval History Rev. No. 0

Atul 15-07-2025 [Submit](#)

Customer Details

Customer * C111001 Phone No.* 9878767876 Email* vaishali.kumar@staago.com Consignee Name*

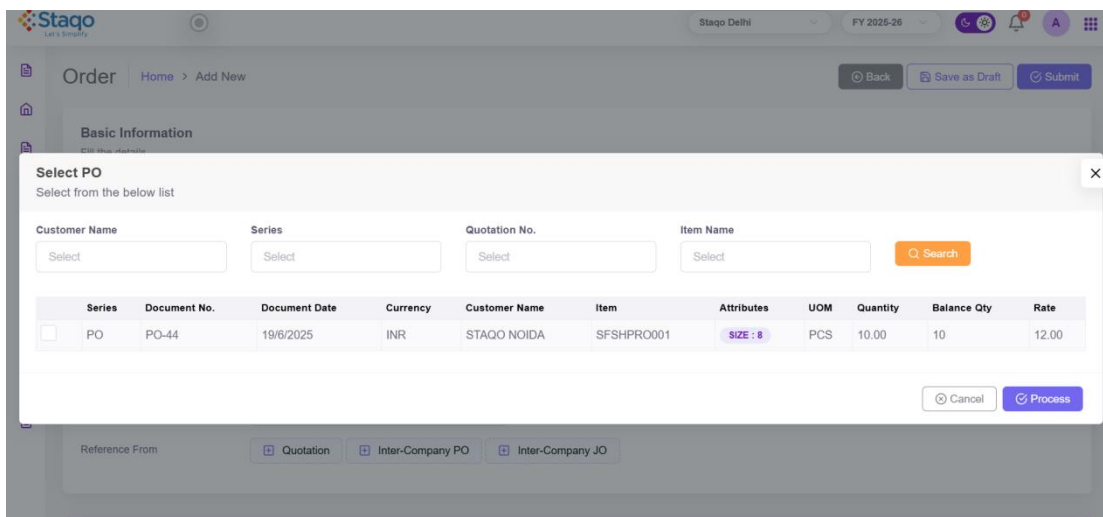
- Create Sales order through **Inter-Company PO**

The **Inter Company Purchase Order** module manages internal procurement between two related organizations.

Here, the **vendor** represents another entity within the group structure. A Purchase Order is raised to request items from the supplying organization.

Upon receipt of goods, the ICPO can be easily converted into a **Sales Order**, allowing the requesting organization to fulfill customer demand efficiently.

This module enhances visibility, accountability, and simplifies inter-company supply chain transactions.



Select PO
Select from the below list

Customer Name Select Series Select Quotation No. Select Item Name Select [Search](#)

Series	Document No.	Document Date	Currency	Customer Name	Item	Attributes	UOM	Quantity	Balance Qty	Rate
<input type="checkbox"/> PO	PO-44	19/6/2025	INR	STAQO NOIDA	SFSHPRO001	SIZE : 8	PCS	10.00	10	12.00

[Cancel](#) [Process](#)

Reference From: [Quotation](#) [Inter-Company PO](#) [Inter-Company JO](#)

- Create Sales order through **Inter-Company JO**

The **Inter Company Job Order** module facilitates internal production requests between organizations within the same group.

In this setup, the **vendor** specified in the Job Order refers to another organization entity in the system.

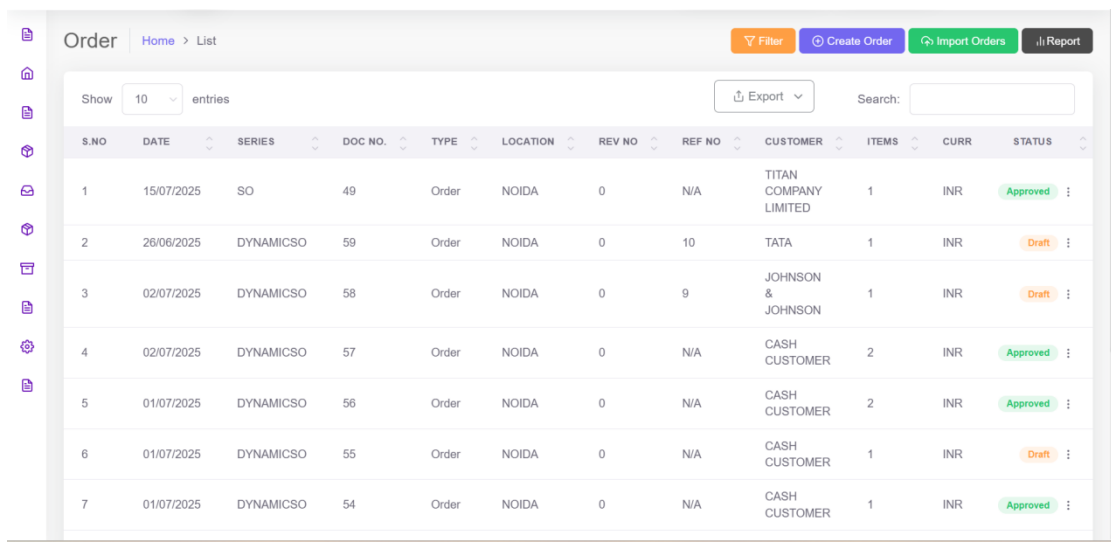
The requesting organization issues the Job Order to the supplying organization to produce and deliver specified items.

Once items are received, this Job Order can be directly pulled into a **Sales Order** for quick and accurate order processing.

This module helps streamline internal coordination, production planning, and stock movement between business units.

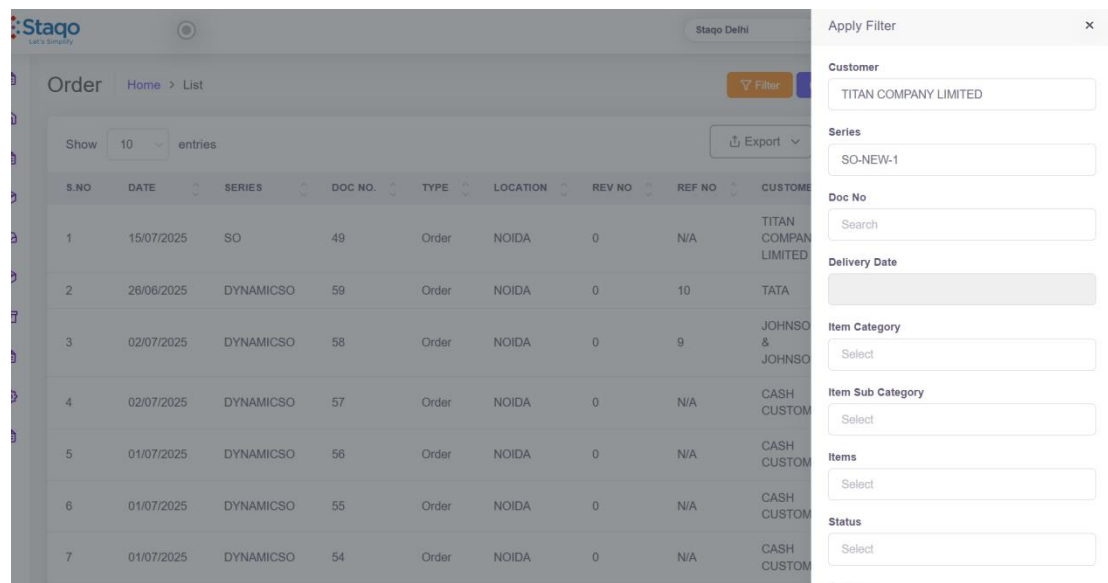
- Sales Order status will be shown on listing page:

Approved, draft, submitted, rejected,



S.NO	DATE	SERIES	DOC NO.	TYPE	LOCATION	REV NO	REF NO	CUSTOMER	ITEMS	CURR	STATUS
1	15/07/2025	SO	49	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED	1	INR	Approved
2	26/06/2025	DYNAMICSO	59	Order	NOIDA	0	10	TATA	1	INR	Draft
3	02/07/2025	DYNAMICSO	58	Order	NOIDA	0	9	JOHNSON & JOHNSON	1	INR	Draft
4	02/07/2025	DYNAMICSO	57	Order	NOIDA	0	N/A	CASH CUSTOMER	2	INR	Approved
5	01/07/2025	DYNAMICSO	56	Order	NOIDA	0	N/A	CASH CUSTOMER	2	INR	Approved
6	01/07/2025	DYNAMICSO	55	Order	NOIDA	0	N/A	CASH CUSTOMER	1	INR	Draft
7	01/07/2025	DYNAMICSO	54	Order	NOIDA	0	N/A	CASH CUSTOMER	1	INR	Approved

- Sales Order can be filtered by entering customer, series, doc no. etc



S.NO	DATE	SERIES	DOC NO.	TYPE	LOCATION	REV NO	REF NO	CUSTOMER
1	15/07/2025	SO	49	Order	NOIDA	0	N/A	TITAN COMPANY LIMITED
2	26/06/2025	DYNAMICSO	59	Order	NOIDA	0	10	TATA
3	02/07/2025	DYNAMICSO	58	Order	NOIDA	0	9	JOHNSON & JOHNSON
4	02/07/2025	DYNAMICSO	57	Order	NOIDA	0	N/A	CASH CUSTOMER
5	01/07/2025	DYNAMICSO	56	Order	NOIDA	0	N/A	CASH CUSTOMER
6	01/07/2025	DYNAMICSO	55	Order	NOIDA	0	N/A	CASH CUSTOMER
7	01/07/2025	DYNAMICSO	54	Order	NOIDA	0	N/A	CASH CUSTOMER

Apply Filter

Customer: TITAN COMPANY LIMITED

Series: SO-NEW-1

Doc No: Search

Delivery Date:

Item Category: Select

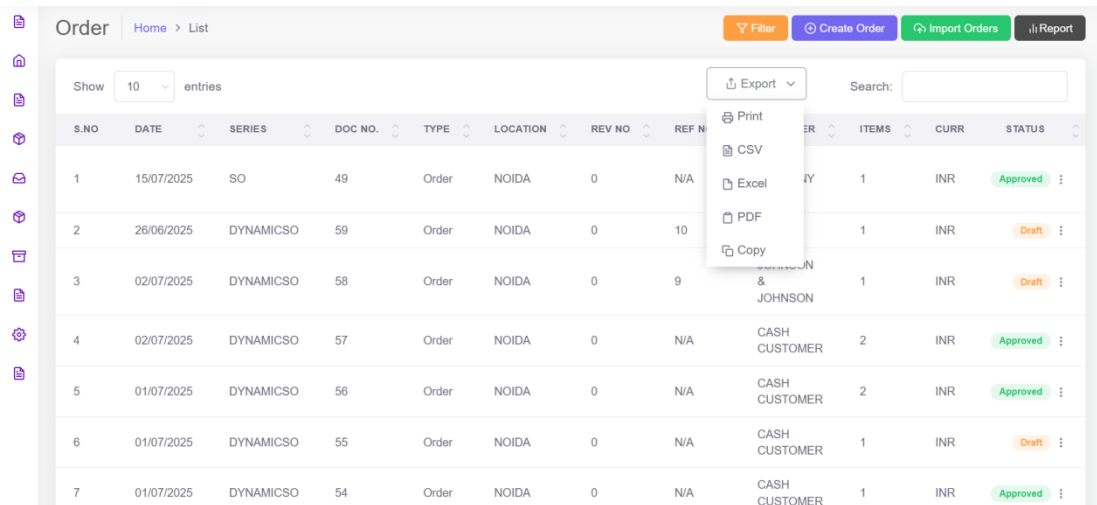
Item Sub Category: Select

Items: Select

Status: Select

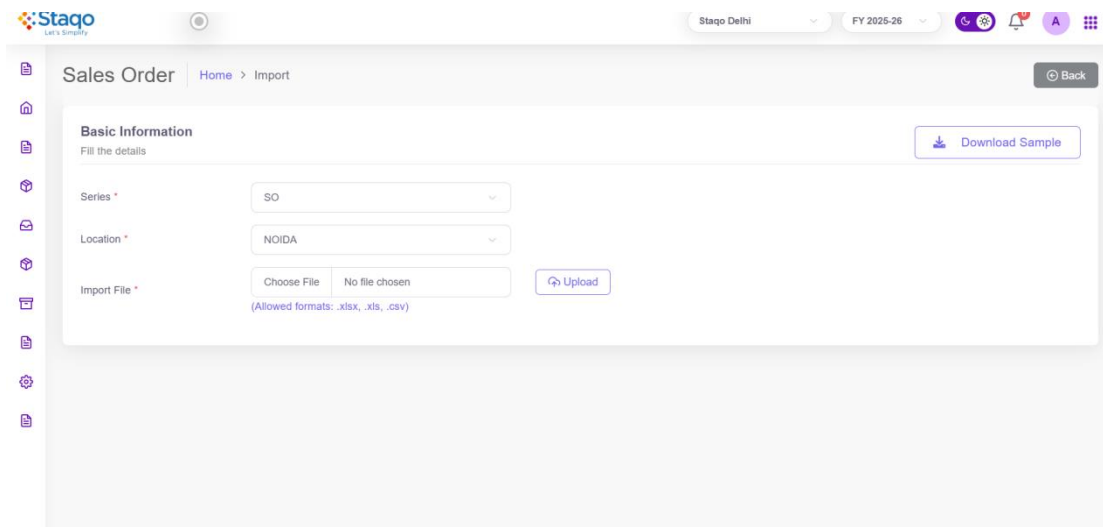
Company:

- Can be export to:
Print, csv, excel, pdf, copy



S.NO	DATE	SERIES	DOC NO.	TYPE	LOCATION	REV NO.	REF NO.	CASH CUSTOMER	ITEMS	CURR	STATUS
1	15/07/2025	SO	49	Order	NOIDA	0	N/A		1	INR	Approved
2	26/06/2025	DYNAMICSO	59	Order	NOIDA	0	10		1	INR	Draft
3	02/07/2025	DYNAMICSO	58	Order	NOIDA	0	9		1	INR	Draft
4	02/07/2025	DYNAMICSO	57	Order	NOIDA	0	N/A	CASH CUSTOMER	2	INR	Approved
5	01/07/2025	DYNAMICSO	56	Order	NOIDA	0	N/A	CASH CUSTOMER	2	INR	Approved
6	01/07/2025	DYNAMICSO	55	Order	NOIDA	0	N/A	CASH CUSTOMER	1	INR	Draft
7	01/07/2025	DYNAMICSO	54	Order	NOIDA	0	N/A	CASH CUSTOMER	1	INR	Approved

- Sales order>Import orders>click
 - User can import the multiple SO from an excel sheet directly to import orders
 - User needs to select series, location, Import file (choose file) and click on upload
 - User can also download the sample to import file



Sales Order Home > Import

Basic Information
Fill the details

Series *

Location *

Import File *

(Allowed formats: .xlsx, .xls, .csv)

- File uploaded: with both valid and invalid records

Sales Order [Home](#) > [Import](#) Back Draft Submit

Basic Information
Fill the details

Series *

Location *

Import File * Upload
(Allowed formats: .xlsx, .xls, .csv)

[Download Sample](#)

Only Valid records will be imported on submission

[Valid Records \(1\)](#) [Invalid Records \(9\)](#)

ORDER NO	ORDER DATE	CUSTOMER	CONSIGNEE	ITEM CODE	UOM	ATTRIBUTES	QTY	RATE
9	15-07-2025	JOHNSON & JOHNSON		FGSHOP1001	PCS		33.000000	546.000000

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- Invalid records: for every invalid record there is a error message shown describing the error as per the rules

Sales Order [Home](#) > [Import](#) Back Draft Submit

Only Valid records will be imported on submission

[Valid Records \(1\)](#) [Invalid Records \(9\)](#)

RATE	DELIVERY DATE	ERRORS
40000.000000	26-06-2025	Past Delivery Date is not allowed
3.000000	26-06-2025	Past Order Date is not allowed, Invalid Item Attribute Name specified, Past Delivery Date is not allowed
3.000000	30-06-2025	Past Order Date is not allowed, Invalid Item Attribute Name specified, Past Delivery Date is not allowed
20000.000000	28-06-2025	Past Delivery Date is not allowed
-90.000000	15-07-2025	Invalid Item Attribute Value - 12 specified for SIZE, Item Quantity cannot be negative, Item Rate cannot be negative
-20.000000	27-06-2025	Past Order Date is not allowed, Item Rate cannot be negative, Past Delivery Date is not allowed
14.000000	30-06-2025	Past Delivery Date is not allowed
55555.000000	10-07-2025	Past Order Date is not allowed, All Attributes of item not specified, Invalid Item Attribute Name specified, Past Delivery Date is not allowed
66666.000000	15-07-2025	Past Order Date is not allowed

- User can submit or draft the valid record

Sales Order [Home](#) > [Import](#) Back Draft Submit

Basic Information
Fill the details

Series *

Location *


Import File * Upload
(Allowed formats: .xlsx, .xls, .csv)

[Download Sample](#)

Only Valid records will be imported on submission

[Valid Records \(1\)](#) [Invalid Records \(9\)](#)

RATE	DELIVERY DATE	ERRORS
40000.000000	26-06-2025	Past Delivery Date is not allowed
3.000000	26-06-2025	Past Order Date is not allowed, Invalid Item Attribute Name specified, Past Delivery Date is not allowed



Success!

1 Sales Order imported Successfully

OK

Message will be shown that 1 sales order imported successfully

4.3. Delivery Note

A **Sales Delivery Note** (also called a Delivery Challan) is a document that goes along with the goods when they are shipped to the customer. It shows what products are being delivered, in what quantity, and to whom.

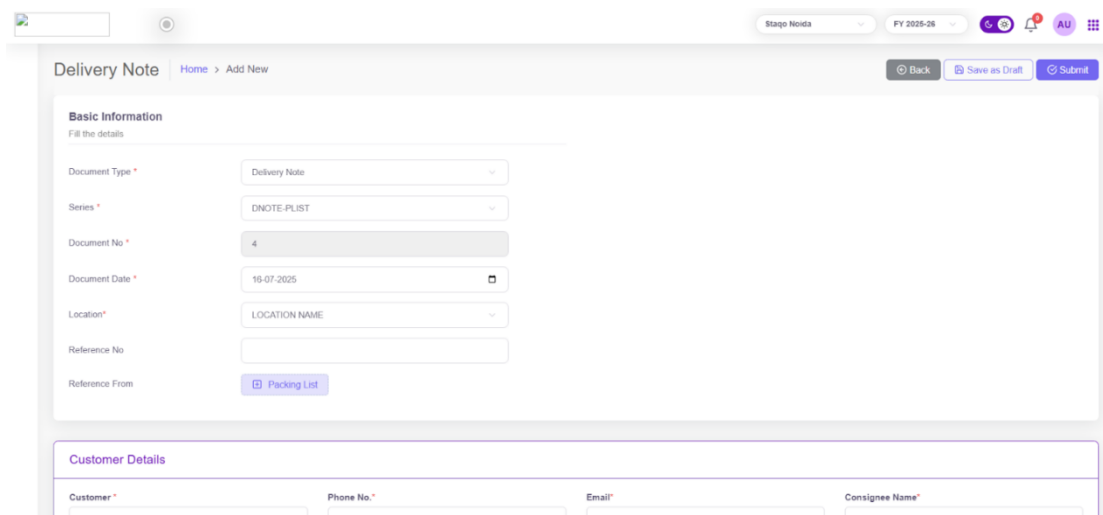
It acts as proof of delivery and helps the warehouse, delivery team, and customer confirm the items shipped.

Generally DN is created before sales Invoice is generated

Navigation: Sales>Delivery Note>Create

Basic details to be filled for creating a Delivery Note:

- User needs to enter series no., document no., doc. Date, doc. type, location, reference no. (if required), reference from (Sales Order, packing list) or direct DN
- User needs to provide customer details like phone no., email, consignee name, currency, payment terms if creating direct DN
- After entering customer name other details will be auto populated if customer is referenced from SO, packing list
- User needs to enter general information like transporter name, transport mode, vehicle no.
- User needs to enter item details
- User can add expense and discount as well
- User can delete the items as well
- User will be able to upload the documents



The screenshot shows the 'Delivery Note' creation interface. At the top, there's a navigation bar with 'Home > Add New' and buttons for 'Back', 'Save as Draft', and 'Submit'. The main form is divided into two sections: 'Basic Information' and 'Customer Details'.

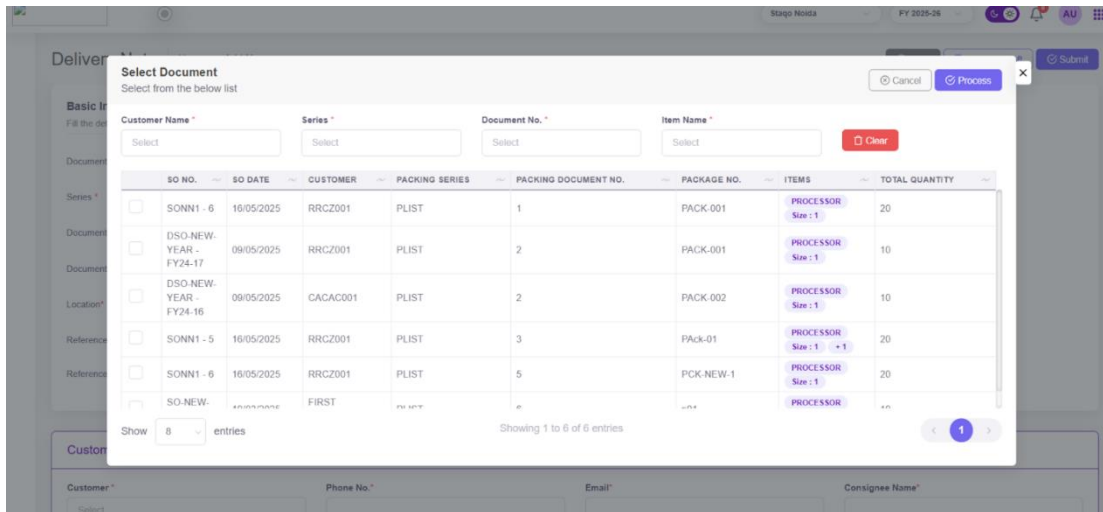
Basic Information

Fill the details

Document Type *	Delivery Note
Series *	DNOTE-PLIST
Document No *	4
Document Date *	19-07-2025
Location *	LOCATION NAME
Reference No	
Reference From	Packing List

Customer Details

Customer *	Phone No. *	Email *	Consignee Name *
Select			



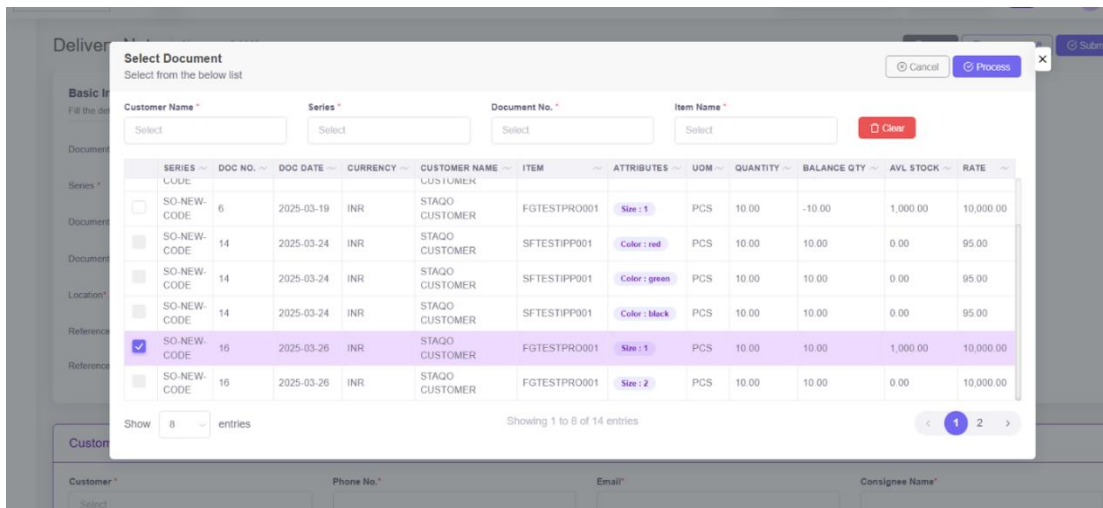
Select Document
Select from the below list

Customer Name * Series * Document No. * Item Name *

SO NO.	SO DATE	CUSTOMER	PACKING SERIES	PACKING DOCUMENT NO.	PACKAGE NO.	ITEMS	TOTAL QUANTITY
<input checked="" type="checkbox"/> SONN1 - 6	16/05/2025	RRCZ001	PLIST	1	PACK-001	PROCESSOR Size : 1	20
<input type="checkbox"/> DSO-NEW- YEAR - FY24-17	09/05/2025	RRCZ001	PLIST	2	PACK-001	PROCESSOR Size : 1	10
<input type="checkbox"/> DSO-NEW- YEAR - FY24-16	09/05/2025	CACAC001	PLIST	2	PACK-002	PROCESSOR Size : 1	10
<input type="checkbox"/> SONN1 - 5	16/05/2025	RRCZ001	PLIST	3	PACK-01	PROCESSOR Size : 1	20
<input type="checkbox"/> SONN1 - 6	16/05/2025	RRCZ001	PLIST	5	PCK-NEW-1	PROCESSOR Size : 1	20
<input type="checkbox"/> SO-NEW-		FIRST				PROCESSOR	

Show 8 entries Showing 1 to 6 of 6 entries

- Select any one and proceed, other details will be auto populated



Select Document
Select from the below list

Customer Name * Series * Document No. * Item Name *

SERIES	DOC NO.	DOC DATE	CURRENCY	CUSTOMER NAME	ITEM	ATTRIBUTES	UOM	QUANTITY	BALANCE QTY	AVL STOCK	RATE
<input checked="" type="checkbox"/> SO-NEW-CODE	6	2025-03-19	INR	STAGO CUSTOMER	FGTESTPRO001	Size : 1	PCS	10.00	-10.00	1,000.00	10,000.00
<input type="checkbox"/> SO-NEW-CODE	14	2025-03-24	INR	STAGO CUSTOMER	SFTESTIPP001	Color : red	PCS	10.00	10.00	0.00	95.00
<input type="checkbox"/> SO-NEW-CODE	14	2025-03-24	INR	STAGO CUSTOMER	SFTESTIPP001	Color : green	PCS	10.00	10.00	0.00	95.00
<input type="checkbox"/> SO-NEW-CODE	14	2025-03-24	INR	STAGO CUSTOMER	SFTESTIPP001	Color : black	PCS	10.00	10.00	0.00	95.00
<input type="checkbox"/> SO-NEW-CODE	16	2025-03-26	INR	STAGO CUSTOMER	FGTESTPRO001	Size : 1	PCS	10.00	10.00	1,000.00	10,000.00
<input type="checkbox"/> SO-NEW-CODE	16	2025-03-26	INR	STAGO CUSTOMER	FGTESTPRO001	Size : 2	PCS	10.00	10.00	0.00	10,000.00

Show 8 entries Showing 1 to 8 of 14 entries

- Save or submit the DN

Delivery Note [Home](#) > [Add New](#) Back Save as Draft Submit

Transporter Name* Jagdeep Transport Mode* Road Vehicle No.* MH12AB1234 E-Way Bill No.

Item Detail
Fill the details

Item Code	Item Name	Attributes	Value	Discount	Total	Action
F0TESTPRO001	PROCESSOR	Size	6000.00	0.00	6000.00	Add
			6000.00	0.00	6000.00	

Item Details

Category: First Category Sub Category: Sub First Category HSN: 29233010

Specifications: Fsx: 100

Attributes: Size: 1

Confirmed Stock: 10 Unconfirmed Stock: 0

Invoice Summary Taxes + Discount - Expenses

Item Total	6000.00
Item Discount	0.00
Taxable Value	6000.00
Taxes	1080.00
Total After Tax	7080.00
Expenses	0
Grand Total	7080.00

DN (Invoice) generated successfully

Approval:

Approver's login:

Navigate to: Sales>approvals>DN(if approval is required)

- Now user will be able to approve the transaction if approver name is defined in series else it will be auto approved
- User will be able to print the transaction
- User will be able to post the transaction

Stago Noida FY 2025-26 Back Reject Approve

Delivery Note [Home](#) > [Add New](#) Back Reject Approve

Basic Information
Fill the details

Document Type* Delivery Note

Series* DNOTE

Document No* 23231

Document Date* 16-07-2025

Location* LOCATION NAME

Reference No 23

Reference From [Sales Order](#)

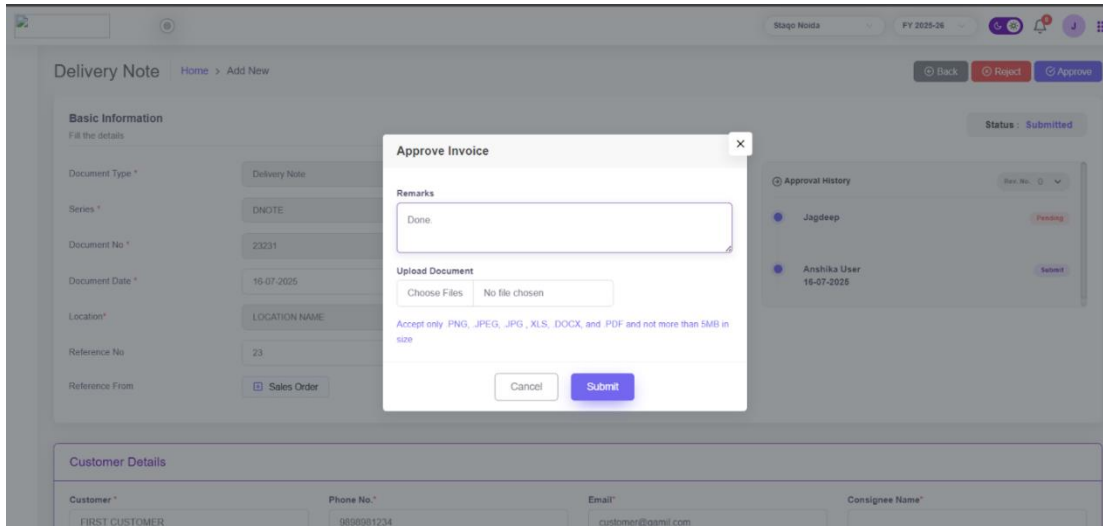
Status: Submitted

Approval History View No.

Jagdeep	Pending
Anshika User 16-07-2025	Submit

Customer Details

Customer* FIRST CUSTOMER Phone No.* 9898981234 Email* customer@gmail.com Consignee Name*



Approve Invoice

Remarks
Done

Upload Document
Choose Files No file chosen

Accept only PNG, JPEG, JPG, XLS, DOCX, and PDF and not more than 5MB in size

Cancel Submit

Basic Information
Fill the details

Document Type * Delivery Note

Series * DNOTE

Document No * 23231

Document Date * 16-07-2025

Location * LOCATION NAME

Reference No 23

Reference From Sales Order

Customer Details

Customer * FIRST CUSTOMER

Phone No. * 988881234

Email * customer@gmail.com

Consignee Name *

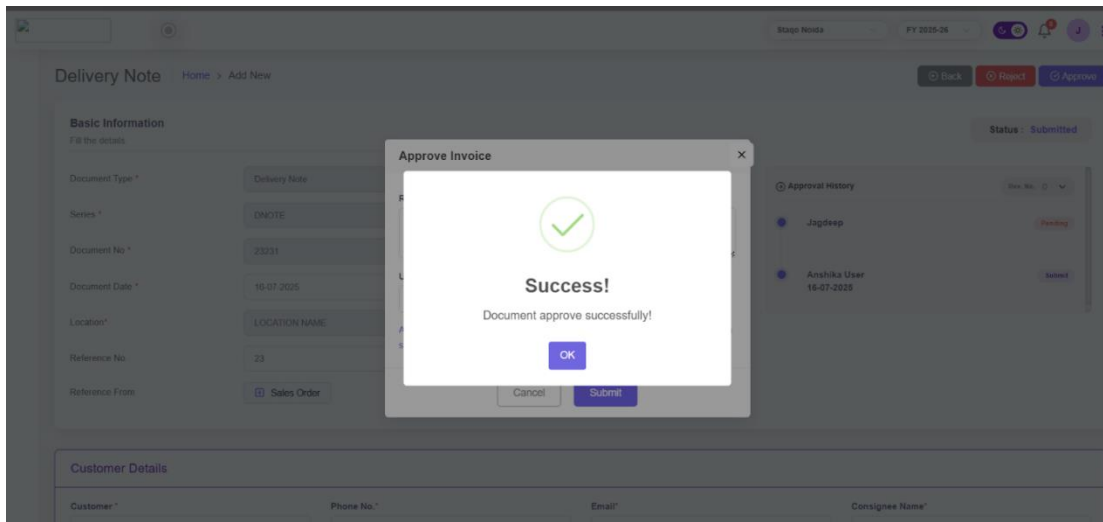
Approval History

Jagdeep Pending

Anshika User 16-07-2025 Submit

Status: Submitted

- User will be able to approve or reject the transaction by adding remarks and document



Approve Invoice

Success!

Document approve successfully!

OK

Cancel Submit

Basic Information
Fill the details

Document Type * Delivery Note

Series * DNOTE

Document No * 23231

Document Date * 16-07-2025

Location * LOCATION NAME

Reference No 23

Reference From Sales Order

Customer Details

Customer * FIRST CUSTOMER

Phone No. * 988881234

Email * customer@gmail.com

Consignee Name *

Approval History

Jagdeep Pending

Anshika User 16-07-2025 Submit

Status: Submitted

Transaction approved successfully

- Delivery Note status will be shown on listing page:
Approved, draft, submitted, rejected, Posted

Stago

Stago Noida FY 2025-26

Delivery Note Home > List

Filter Create Delivery Note Report

Show 10 entries Export Search:

S.NO	DATE	SERIES	DOC NO.	LOCATION	DEPARTMENT	REV NO	REF NO	CUSTOMER	ITEMS	CURR	ITEM VALUE	STATUS
1	26/05/2025	DNOTE-PLIST	3	LOCATION 1	N/A	0	N/A	RCZ	2	INR	4,000.00	Approved
2	26/05/2025	DNOTE-PLIST	2	LOCATION 1	N/A	0	N/A	RCZ	2	INR	4,000.00	Approved
3	23/05/2025	DNOTE-PLIST	1	LOCATION 1	N/A	0	ERP	RCZ	1	INR	200.00	Approved
4	30/04/2025	DNOTE	8	LOCATION 1	N/A	0	N/A	TPM	1	INR	400.00	Approved
5	14/04/2025	DNOTE	RDFGBN	LOCATION 1	N/A	0	1	TPM	1	INR	200.00	Approved
6	14/04/2025	DNOTE	REDFV	LOCATION 1	N/A	0	23	TPM	1	INR	2,000.00	Draft
7	07/04/2025	DNOTE-SINGLE	2	LOCATION 1	N/A	0	12	TPM	1	INR	2,000.00	Approved
8	07/04/2025	DNOTE-PULL-SO	31	LOCATION 1	N/A	0	1334	TPM	1	INR	2,000.00	Approved
9	04/04/2025	DNOTE-PULL-SO	30	LOCATION 1	N/A	0	12	TPM	1	INR	20,000.00	Approved
10	04/04/2025	DNOTE-PULL-SO	29	LOCATION 1	N/A	0	12	TPM	1	INR	20,000.00	Approved

Showing 1 to 10 of 13 entries

- Delivery Note can be filtered by entering customer, series, doc no. Etc.

Stago

Stago Noida

Delivery Note Home > List

Filter Create Delivery Note Report

Show 10 entries Export Search:

S.NO	DATE	SERIES	DOC NO.	LOCATION	DEPARTMENT	REV NO	REF NO	CUSTOMER	ITEMS	CURR	ITEM VALUE	STATUS
1	26/05/2025	DNOTE-PLIST	3	LOCATION 1	N/A	0	N/A	RCZ	2	INR	4,000.00	Approved
2	26/05/2025	DNOTE-PLIST	2	LOCATION 1	N/A	0	N/A	RCZ	2	INR	4,000.00	Approved
3	23/05/2025	DNOTE-PLIST	1	LOCATION 1	N/A	0	ERP	RCZ	1	INR	200.00	Approved
4	30/04/2025	DNOTE	8	LOCATION 1	N/A	0	N/A	TPM	1	INR	400.00	Approved
5	14/04/2025	DNOTE	RDFGBN	LOCATION 1	N/A	0	1	TPM	1	INR	200.00	Approved
6	14/04/2025	DNOTE	REDFV	LOCATION 1	N/A	0	23	TPM	1	INR	2,000.00	Draft
7	07/04/2025	DNOTE-SINGLE	2	LOCATION 1	N/A	0	12	TPM	1	INR	2,000.00	Approved
8	07/04/2025	DNOTE-PULL-SO	31	LOCATION 1	N/A	0	1334	TPM	1	INR	2,000.00	Approved
9	04/04/2025	DNOTE-PULL-SO	30	LOCATION 1	N/A	0	12	TPM	1	INR	20,000.00	Approved
10	04/04/2025	DNOTE-PULL-SO	29	LOCATION 1	N/A	0	12	TPM	1	INR	20,000.00	Approved

Showing 1 to 10 of 13 entries

Apply Filter

Customer Select

Series Select

Doc No Search

Order No Search

Order Dt

Item Category Select

Item Sub Category Select

Items Select

Status Select

- Can be export to:

Print, csv, excel, pdf, copy

Stago

Stago Noida FY 2025-26

Delivery Note Home > List

Filter Create Delivery Note Report

Show 10 entries Export Search:

S.NO	DATE	SERIES	DOC NO.	LOCATION	DEPARTMENT	REV NO	REF NO	CUSTOMER	ITEMS	CURR	ITEM VALUE	STATUS
1	26/05/2025	DNOTE-PLIST	3	LOCATION 1	N/A	0	N/A	RCZ	2	INR	4,000.00	Approved
2	26/05/2025	DNOTE-PLIST	2	LOCATION 1	N/A	0	N/A	RCZ	2	INR	4,000.00	Approved
3	23/05/2025	DNOTE-PLIST	1	LOCATION 1	N/A	0	ERP	RCZ	1	INR	200.00	Approved
4	30/04/2025	DNOTE	8	LOCATION 1	N/A	0	N/A	TPM	1	INR	400.00	Approved
5	14/04/2025	DNOTE	RDFGBN	LOCATION 1	N/A	0	1	TPM	1	INR	200.00	Approved
6	14/04/2025	DNOTE	REDFV	LOCATION 1	N/A	0	23	TPM	1	INR	2,000.00	Draft
7	07/04/2025	DNOTE-SINGLE	2	LOCATION 1	N/A	0	12	TPM	1	INR	2,000.00	Approved
8	07/04/2025	DNOTE-PULL-SO	31	LOCATION 1	N/A	0	1334	TPM	1	INR	2,000.00	Approved
9	04/04/2025	DNOTE-PULL-SO	30	LOCATION 1	N/A	0	12	TPM	1	INR	20,000.00	Approved
10	04/04/2025	DNOTE-PULL-SO	29	LOCATION 1	N/A	0	12	TPM	1	INR	20,000.00	Approved

Showing 1 to 10 of 13 entries

Export Print CSV Excel PDF Copy

4.4. Sales Invoice

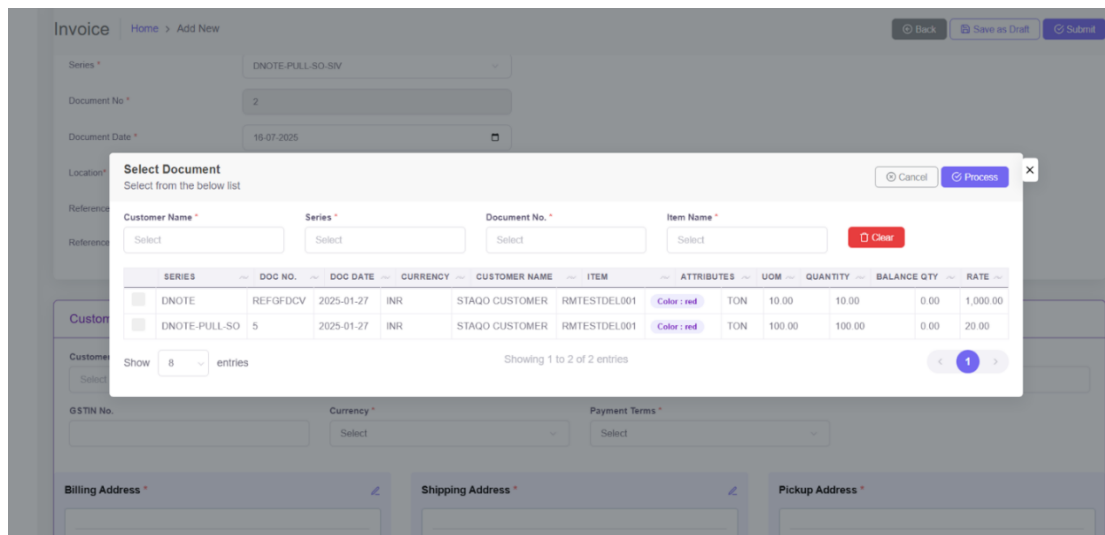
A **Sales Invoice** is a document that you send to the customer to request payment for the goods or services you've sold and delivered. It is the final step in the sales process after a **Sales Order** and **Delivery Note**.

The invoice includes all the details of the transaction — such as what was sold, how much it cost, taxes, and when payment is due.

Navigation: Sales>Sales Invoice>Create

Basic details to be filled for creating a Sales Invoice :

- User needs to enter series no., document no., doc. Date, doc. type, location, reference no. (if required), reference from (DN) or direct SI
- User needs to provide customer details like phone no., email, consignee name, currency, payment terms if creating direct SI
- After entering customer name other details will be auto populated if customer is referenced from DN
- User needs to enter general information like transporter name, transport mode, vehicle no.
- User needs to enter item details
- User can add expense and discount as well
- User can delete the items as well
- User will be able to upload the documents



Select Document
Select from the below list

Customer Name * Series * Document No. * Item Name *

Select Select Select Select Clear

SERIES	DOC NO.	DOC DATE	CURRENCY	CUSTOMER NAME	ITEM	ATTRIBUTES	UOM	QUANTITY	BALANCE QTY	RATE
DNOTE	REFGDCV	2025-01-27	INR	STAGO CUSTOMER	RMTESTDEL001	Color : red	TON	10.00	0.00	1,000.00
DNOTE-PULL-SO	5	2025-01-27	INR	STAGO CUSTOMER	RMTESTDEL001	Color : red	TON	100.00	0.00	20.00

Show 8 entries Showing 1 to 2 of 2 entries 1

- Select any one and proceed, other details will be auto populated
- Save or submit the SI

Invoice [Home](#) > [Add New](#) Back Save as Draft Submit

General Information

Transporter Name* Transport Mode* Vehicle No.* E-Way Bill No.

Jagdeep Road MH12AB1234

Item Detail

Fill the details

Item Code	Item Name	Actual	Value	Discount	Total	Action
FGTESTPRO001	PROCESSOR	5	6000.00	0.00	6000.00	Add
			6000.00	0.00	6000.00	

Item Details

Category: First Category Sub Category: Sub First Category HSN: 28232010

Specifications Fss: 100

Attributes Size: 1

Confirmed Stock: 10 Unconfirmed Stock: 0

Invoice Summary

Item Total	Item Discount	Taxable Value	Taxes	Total After Tax	Expenses	Grand Total
6000.00	0.00	6000.00	1000.00	7000.00	0.00	7000.00

Success!

Invoice created successfully

OK

- SI submitted Successfully

Approval:

Approver's login:

Navigate to: Sales>approvals>SI (if approval is required)

- Now user will be able to approve the transaction if approver name is defined in series else it will be auto approved
- User will be able to print the transaction
- User will be able to post the transaction

Sales Invoice [Home](#) > [Add New](#) Back Reject Approve

Basic Information

Fill the details

Document Type* Sales Invoice

Series* SI

Document No* 2

Document Date* 16-07-2025

Location* LOCATION NAME

Reference No

Status: Submitted

Approval History

Rev. No. 1

Anshika User Pending

Jagdeep 16-07-2025 Submit

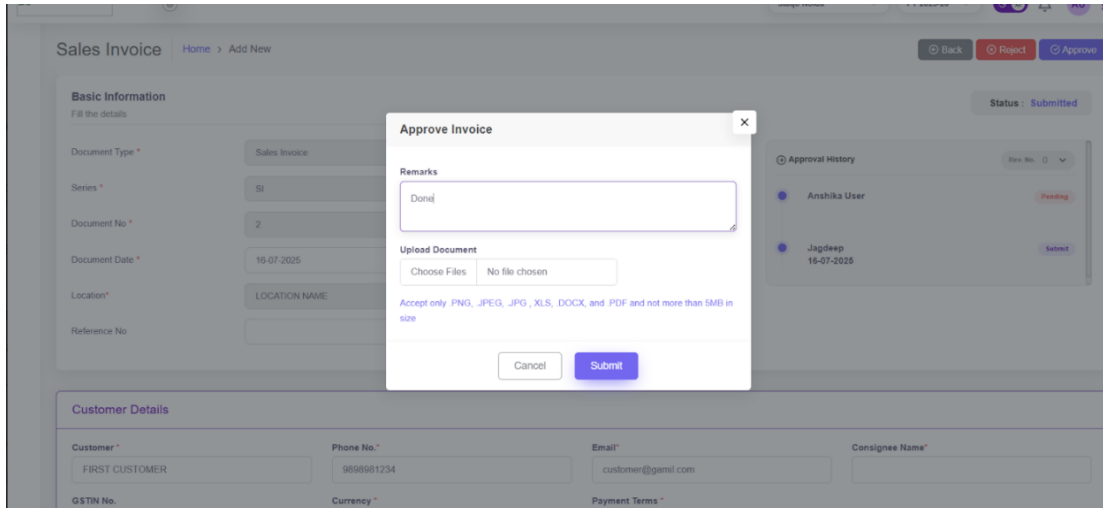
Customer Details

Customer* FIRST CUSTOMER

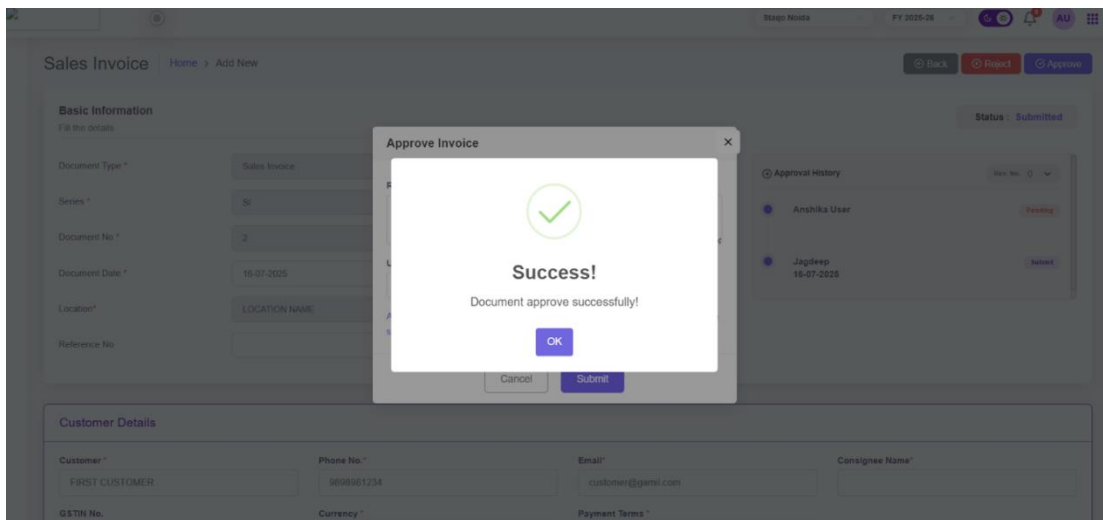
Phone No.* 9698981234

Email* customer@gmail.com

Consignee Name*



- User will be able to approve or reject the transaction by adding remarks and document



Transaction approved successfully

- Sales Invoice status will be shown on listing page:
Approved, draft, submitted, rejected, Posted

Invoice [Home](#) > [List](#) Filter Create Invoice Report

Show 10 entries Export Search:

S.NO	DATE	SERIES	DOC NO.	LOCATION	DEPARTMENT	REV NO	REF NO	CUSTOMER	ITEMS	CURR	ITEM VALUE	STATUS
1	16/07/2025	DNOTE-PULL-SO-SIV	2	LOCATION 1	N/A	0	N/A	STAGO CUSTOMER	1	INR	4,000.00	Approved
2	16/07/2025	DNOTE	23231	LOCATION 1	N/A	0	23	STAGO CUSTOMER	1	INR	6,000.00	Approved
3	27/06/2025	SI-DNOTE	2	LOCATION 1	N/A	0	8909880	STAGO CUSTOMER	1	INR	20,000.00	Approved
4	13/05/2025	SIV	42	LOCATION 1	N/A	0	ERC	TPM	1	INR	40,000.00	Approved
5	07/05/2025	DNOTE-PULL-SO-SIV	1	LOCATION 1	N/A	0	SIV	CASH CUSTOMER	1	INR	2,000.00	Approved
6	25/04/2025	SIV	41	LOCATION 1	N/A	0	1344	TPM	1	INR	2,000.00	Approved
7	23/04/2025	SIV	40	LOCATION 1	N/A	0	13	STAGO CUSTOMER	1	INR	2,000.00	Approved
8	18/04/2025	SIV	39	LOCATION 1	N/A	0	123	TPM	2	INR	94,090.00	Posted
9	17/04/2025	SIV	38	LOCATION 1	N/A	0	134	TPM	2	INR	14,050.00	Posted
10	17/04/2025	SIV	37	LOCATION 1	N/A	0	1234556	TPM	2	INR	72,000.00	Posted

- Sales Invoice can be filtered by entering customer, series, doc no. Etc.

Stago Let's Simplify

Invoice [Home](#) > [List](#) Export Search:

Apply Filter

Customer
TITAN COMPANY LIMITED

Series
Select
DNOTE-1
SI
D-NOTE2
SI-TEST
DNOTE3
DN1

Item Category
Select

Item Sub Category
Select

Items
Select

S.NO	DATE	SERIES	DOC NO.	LOCATION	DEPARTMENT	REV NO	REF NO	CUSTOMER
1	23/05/2025	SI1	10	NOIDA1	N/A	0	N/A	TITAN COM. LIMIT
2	23/05/2025	SI1	9	NOIDA1	N/A	0	N/A	CASH CUST
3	23/05/2025	SI1	8	NOIDA1	N/A	0	N/A	TITAN COM. LIMIT
4	23/05/2025	SI1	7	NOIDA1	N/A	0	N/A	CASH CUST
5	23/05/2025	SI1	6	NOIDA1	N/A	0	N/A	TITAN COM. LIMIT
6	23/05/2025	SI1	5	NOIDA1	N/A	0	N/A	CASH CUST

- Can be export to:

Print, csv, excel, pdf, copy

Stago Let's Simplify

Invoice [Home](#) > [List](#) Filter Create Invoice Report

Show 10 entries Export Search:

Print
CSV
Excel
PDF
Copy

S.NO	DATE	SERIES	DOC NO.	LOCATION	DEPARTMENT	REV NO	REF NO	CUSTOMER	ITEMS	CUI	STATUS
1	23/05/2025	SI1	10	NOIDA1	N/A	0	N/A	TITAN COMPANY LIMITED	1	INR	Posted
2	23/05/2025	SI1	9	NOIDA1	N/A	0	N/A	TITAN COMPANY LIMITED	1	INR	Approved
3	23/05/2025	SI1	8	NOIDA1	N/A	0	N/A	TITAN COMPANY LIMITED	1	INR	Approved
4	23/05/2025	SI1	7	NOIDA1	N/A	0	N/A	CASH CUSTOMER	1	INR	Posted
5	23/05/2025	SI1	6	NOIDA1	N/A	0	N/A	TITAN COMPANY LIMITED	1	INR	Approved
6	23/05/2025	SI1	5	NOIDA1	N/A	0	N/A	CASH CUSTOMER	1	INR	Posted

4.5. Pick List

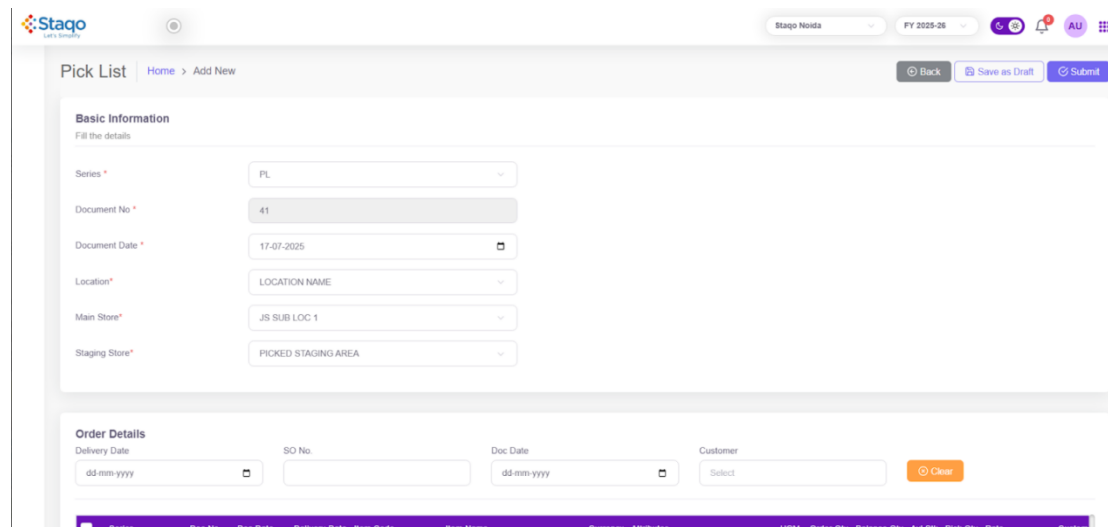
The **Pick List** module is used to move selected items from the **main store** to the **staging store** (picking area) in preparation for dispatch or further processing. Users can choose specific items and quantities to be picked, and the system facilitates **stock reservation** to prevent over-allocation.

This ensures that reserved stock is dedicated for the intended order or purpose. The module also supports **multi-level approval workflows**, ensuring proper control and traceability of inventory movements within the warehouse.

Navigation: Sales>Pick List>Create

Basic details to be filled for creating a Pick List :

- User needs to enter series no., document no., doc. Date, location, main store, staging store
- User needs to add pick list details like Series to select, document no., doc. Date, delivery date, Item code, item name, currency, attributes, pick qty., rate, balance qty., package no., etc. and proceed by clicking on submit.



The screenshot shows the 'Pick List' creation interface in the Staqa system. The top navigation bar includes the Staqa logo, a user profile icon, and a 'Home' button. The main header displays 'Pick List' with a breadcrumb trail 'Home > Add New'. Below the header, there are three buttons: 'Back', 'Save as Draft', and 'Submit'. The form is divided into two main sections: 'Basic Information' and 'Order Details'.

Basic Information section includes the following fields:

- Series ***: A dropdown menu with 'PL' selected.
- Document No ***: A text input field containing '41'.
- Document Date ***: A date picker showing '17-07-2025'.
- Location ***: A dropdown menu with 'LOCATION NAME' selected.
- Main Store ***: A dropdown menu with 'JS SUB LOC 1' selected.
- Staging Store ***: A dropdown menu with 'PICKED STAGING AREA' selected.

Order Details section includes the following fields:

- Delivery Date**: A date picker showing 'dd-mm-yyyy'.
- SO No.**: A text input field.
- Doc Date**: A date picker showing 'dd-mm-yyyy'.
- Customer**: A dropdown menu with 'Select' as the placeholder.

At the bottom of the form, there is a 'Clear' button. The footer of the page displays a list of system modules: Sales, Doc No, Doc Date, Delivery Date, Item Code, Item Name, Currency, Attributes, LCM, Order Qty, Balance Qty, A/R, Pick Qty, Rate, and Customer.

Pick List

Home > Add New

Back

Save as Draft

Submit

Staging Store*

PICKED STAGING AREA

Order Details

Delivery Date

dd-mm-yyyy

SO No.

Doc Date

dd-mm-yyyy

Customer

Select

Clear

	Series	Doc No.	Doc Date	Delivery Date	Item Code	Item Name	Currency	Attributes	UOM	Order Qty	Balance Qty	Avl Stk	Pick Qty	Rate	Custom
<input type="checkbox"/>	SOD	37	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 3	TON	8.00	8	0.00	8.00	20.000000	TPM
<input type="checkbox"/>	SOD	37	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 1	TON	10.00	5	19.92	5	20.000000	TPM
<input type="checkbox"/>	SOD	36	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 3	PCS	30.00	30	0.00	30.00	30.000000	TPM
<input type="checkbox"/>	SOD	36	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 1	PCS	3.00	3	1992	3.00	30.000000	TPM
<input type="checkbox"/>	SOD	35	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 3	TON	8.00	8	0.00	8.00	40.000000	RCZ
<input type="checkbox"/>	SOD	38	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 1	TON	9.00	9	19.92	9.00	30.000000	RCZ
<input type="checkbox"/>	SOD	38	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 3	TON	40.00	40	0.00	40.00	30.000000	RCZ
<input type="checkbox"/>	SOD	39	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 2	PCS	4.00	4	0.00	4.00	400.000000	TPM
<input type="checkbox"/>	SOD	39	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 3	PCS	8.00	8	0.00	8.00	400.000000	TPM
<input type="checkbox"/>	SOD	40	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 1	TON	20.00	20	19.92	20.00	40.000000	STAC

Pick List

Home > Add New

Back

Save as Draft

Submit

Staging Store*

PICKED STAGING AREA

Order Details

Delivery Date

dd-mm-yyyy

SO No.

Doc Date

dd-mm-yyyy

Customer

Select

Clear

Pick List

Home > Add New

Back

Save as Draft

Submit

Staging Store*

PICKED STAGING AREA

Order Details

Delivery Date

dd-mm-yyyy

SO No.

Doc Date

Customer

Select

Clear

	Series	Doc No.	Doc Date	Delivery Date	Item Code	Item Name	Currency	Attributes	UOM	Order Qty	Balance Qty	Avl Stk	Pick Qty	Rate	Custom
<input type="checkbox"/>	SOD	37	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 3	TON	8.00	8	0.00	8.00	20.000000	TPM
<input checked="" type="checkbox"/>	SOD	37	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 1	TON	10.00	5	19.92	5	20.000000	TPM
<input type="checkbox"/>	SOD	36	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 3	PCS	30.00	30	0.00	30.00	30.000000	TPM
<input type="checkbox"/>	SOD	36	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 1	PCS	3.00	3	1992	3.00	30.000000	TPM
<input type="checkbox"/>	SOD	35	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 3	TON	8.00	8	0.00	8.00	40.000000	RCZ
<input type="checkbox"/>	SOD	38	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 1	TON	9.00	9	19.92	9.00	30.000000	RCZ
<input type="checkbox"/>	SOD	38	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 3	TON	40.00	40	0.00	40.00	30.000000	RCZ
<input type="checkbox"/>	SOD	39	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 2	PCS	4.00	4	0.00	4.00	400.000000	TPM
<input type="checkbox"/>	SOD	39	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 3	PCS	8.00	8	0.00	8.00	400.000000	TPM
<input type="checkbox"/>	SOD	40	2025-06-02	2025-06-02	FGTESTPRO001	PROCESSOR	INR	Size: 1	TON	20.00	20	19.92	20.00	40.000000	STZ

Success!

Pick List created successfully

OK

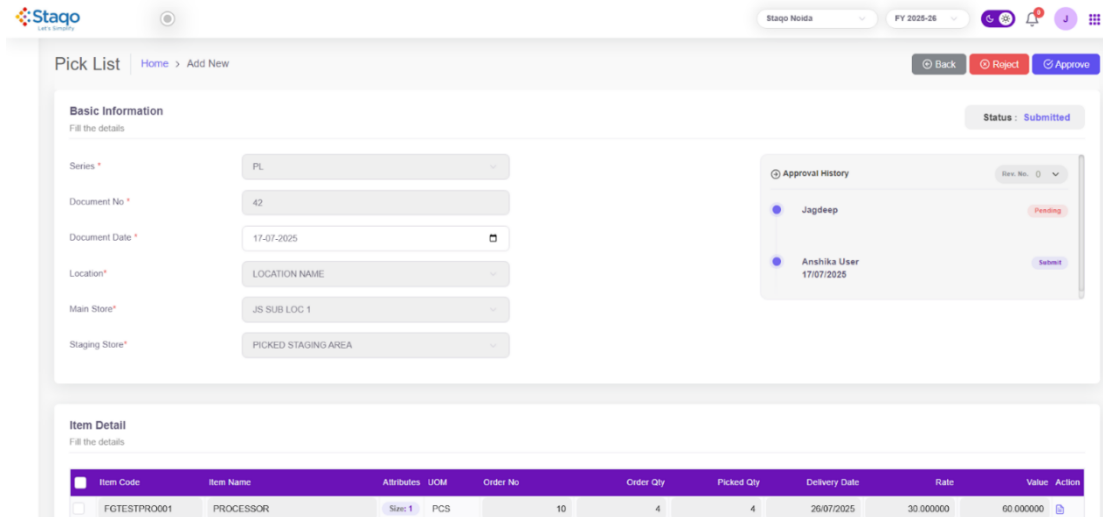
Pick List created successfully

Approval:

Approver's login:

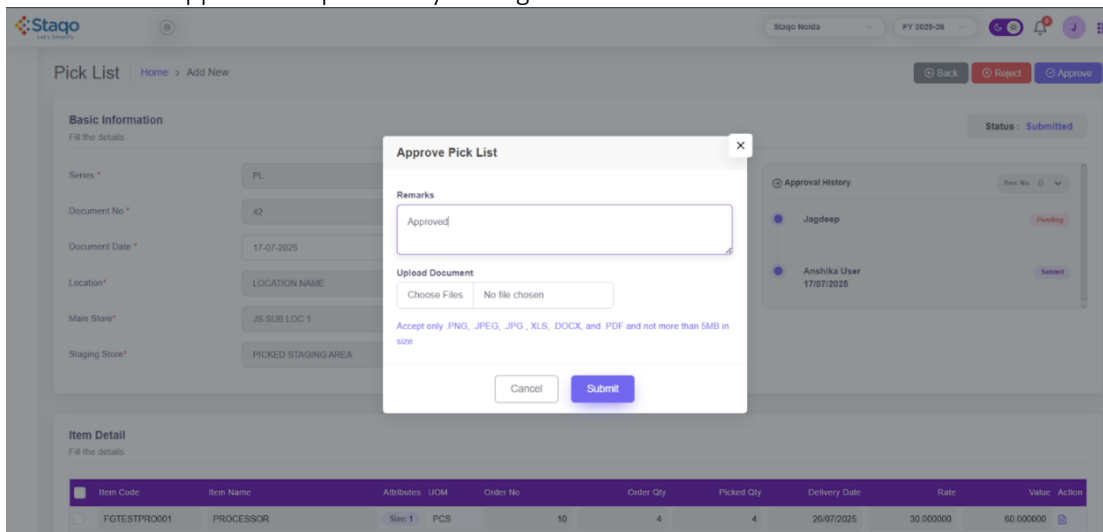
Navigate to: Sales>Approvals>Pick list (if approval is required)

- Now user will be able to approve the transaction if approver name is defined in series else it will be auto approved

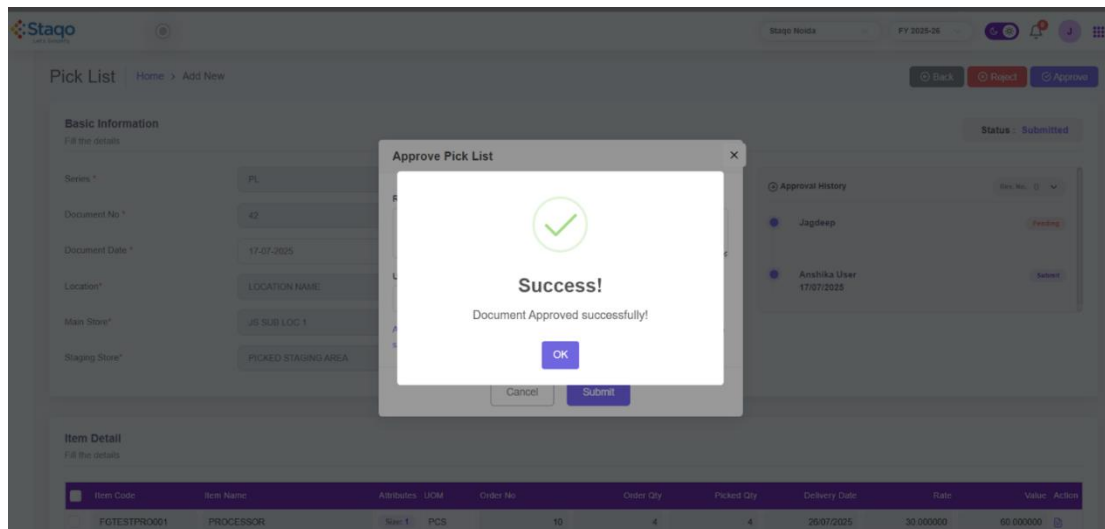


The screenshot shows the Staqa Pick List form. The top navigation bar includes the Staqa logo, a user profile icon, and a status bar with 'Stago Noida' and 'FY 2025-26'. The form has a 'Pick List' header with 'Home' and 'Add New' links, and buttons for 'Back', 'Reject', and 'Approve'. The 'Basic Information' section contains fields for Series (PL), Document No (42), Document Date (17-07-2025), Location (LOCATION NAME), Main Store (JS SUB LOC 1), and Staging Store (PICKED STAGING AREA). The 'Item Detail' section shows a table with columns: Item Code, Item Name, Attributes, UOM, Order No, Order Qty, Picked Qty, Delivery Date, Rate, Value, and Action. The table contains one row for 'FGTESTPR0001' with a value of 60.000000.

- User can approve or reject the transaction request
- User can approve the pick list by adding remarks and documents



The screenshot shows the Staqa Pick List form with an 'Approve Pick List' modal dialog open. The dialog has a 'Remarks' field with the text 'Approved' and an 'Upload Document' section with a 'Choose Files' button and a 'No file chosen' message. Below the upload section, it states 'Accept only PNG, JPEG, JPG, XLS, DOCX, and PDF and not more than 5MB in size'. The dialog has 'Cancel' and 'Submit' buttons. The background form is dimmed, showing the same 'Basic Information' and 'Item Detail' sections as the previous screenshot.



- Pick List approved successfully
- Pick List status will be shown on listing page:
Approved, draft, submitted, rejected

S.NO	DATE	SERIES	DOC NO.	LOCATION	MAIN STORE	STAGING STORE	REV NO.	ITEMS	STATUS
1	17/07/2025	PL	41	LOCATION NAME	JS SUB LOC 1	PICKED STAGING AREA	0	1	Approved
2	16/07/2025	PL	40	LOCATION NAME	JS SUB LOC 1	PICKED STAGING AREA	0	1	Approved
3	16/07/2025	PL	39	LOCATION NAME	JS SUB LOC 1	PICKED STAGING AREA	0	1	Approved
4	16/07/2025	PL	38	LOCATION NAME	JS SUB LOC 1	PICKED STAGING AREA	0	1	Approved
5	16/07/2025	PL	37	LOCATION NAME	JS SUB LOC 1	PICKED STAGING AREA	0	1	Approved
6	16/07/2025	PL	36	LOCATION NAME	JS SUB LOC 1	PICKED STAGING AREA	0	1	Approved
7	16/07/2025	PL	35	LOCATION NAME	JS SUB LOC 1	PICKED STAGING AREA	0	1	Approved
8	16/07/2025	PL	34	LOCATION NAME	JS SUB LOC 1	PICKED STAGING AREA	0	1	Approved
9	16/07/2025	PL	33	LOCATION NAME	JS SUB LOC 1	PICKED STAGING AREA	0	2	Approved
10	15/07/2025	PL	32	LOCATION NAME	JS SUB LOC 1	PICKED STAGING AREA	0	1	Approved

4.6. Packing List

The **Packing List** module is used to manage the physical bundling of items for dispatch or storage. Once items are ready for shipment, users can create a packing list to specify how much quantity of each item is packed in each **bundle** or **package**.

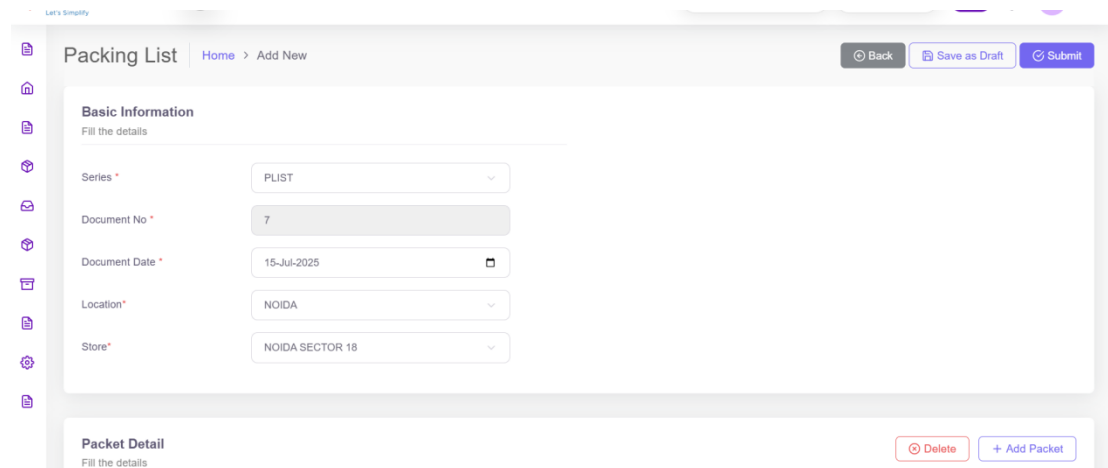
Upon creation, the item stock is transferred from the main store to the **packing store**, bundle-wise, ensuring accurate tracking of packed inventory.

This module helps in organizing dispatches, managing bundle-level traceability, and preparing documentation for transport and customer delivery.

Navigation: Sales>Packing List>Create

Basic details to be filled for creating a Packing List :

- User needs to enter series no., document no., doc. Date, Store
- User needs to add packets with SO no., SO date, Customer, Items, package no., and select the item details and proceed by clicking on submit
- User can add remarks
- User can delete the packets as well
- User will be able to upload the documents



Packing List | Home > Add New

⏮ Back | 💾 Save as Draft | 📤 Submit

Basic Information
Fill the details

Series *

Document No *

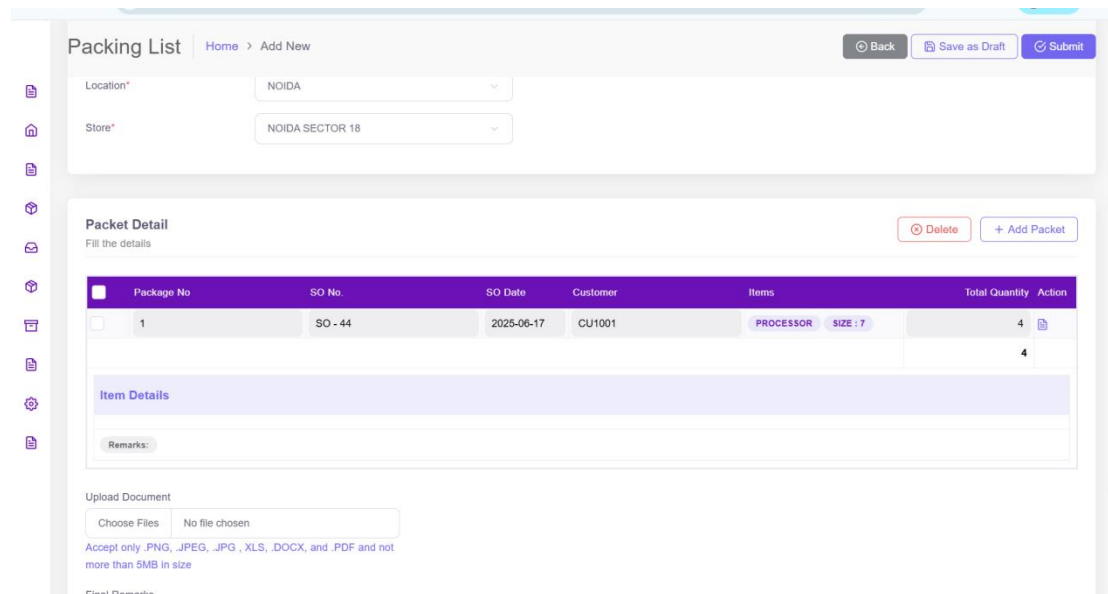
Document Date *

Location *

Store *

Packet Detail
Fill the details

🗑 Delete | ➕ Add Packet



Packing List | Home > Add New

⏮ Back | 💾 Save as Draft | 📤 Submit

Location *

Store *

Packet Detail
Fill the details

🗑 Delete | ➕ Add Packet

Package No	SO No.	SO Date	Customer	Items	Total Quantity	Action
<input type="checkbox"/> 1	SO - 44	2025-06-17	CU1001	PROCESSOR SIZE : 7	4	🗑
					4	

Item Details

Remarks:

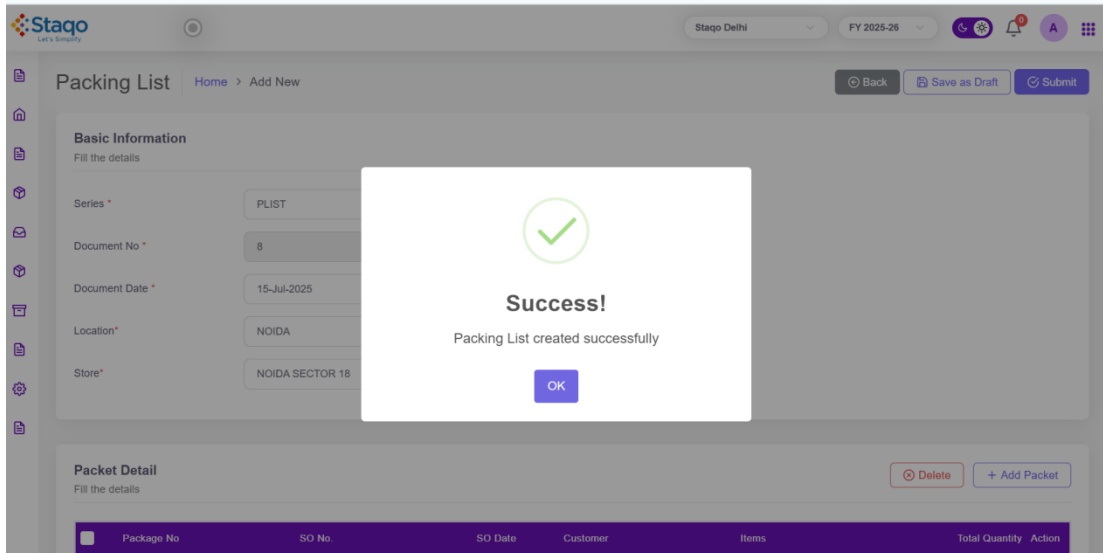
Upload Document

Choose Files | No file chosen

Accept only .PNG, .JPEG, .JPG, .XLS, .DOCX, and .PDF and not more than 5MB in size

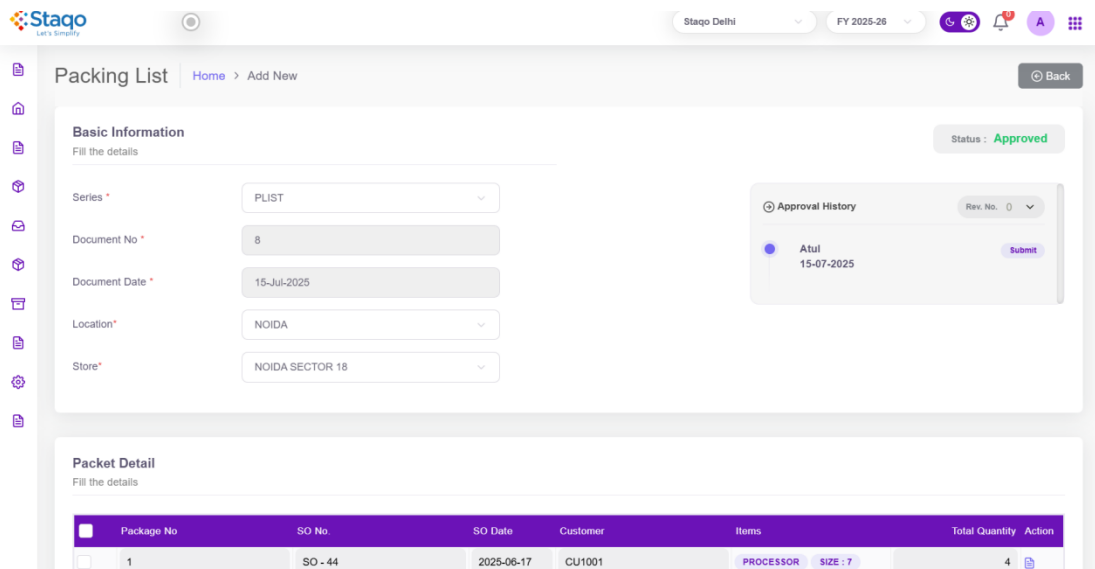
Final Remarks:

Save or submit the Packing list




The screenshot shows the Staqa Packing List form. A modal window in the center displays a green checkmark and the text "Success! Packing List created successfully" with an "OK" button. The background form is partially visible, showing fields for Series (PLIST), Document No (8), Document Date (15-Jul-2025), Location (NOIDA), and Store (NOIDA SECTOR 18). The top navigation bar includes "Staqa Delhi" and "FY 2025-26".

Packing list submitted successfully



The screenshot shows the Staqa Packing List form with the "Status: Approved" label. The form fields are the same as in the previous screenshot. An "Approval History" section on the right shows a single entry for "Atul" on "15-07-2025" with a "Submit" button. The bottom section, "Packet Detail", contains a table with the following data:

Package No	SO No	SO Date	Customer	Items	Total Quantity	Action
1	SO - 44	2025-06-17	CU1001	PROCESSOR SIZE : 7	4	

Packing list submitted and approved successfully

Approval:

Approver's login:

Navigate to: Sales>approvals>Packing list (if approval is required)

- Now user will be able to approve the transaction if approver name is defined in series else it will be auto approved

- Packing List status will be shown on listing page:

Approved, draft, submitted, rejected

The screenshot shows the Staqa Packing List interface. At the top, there's a header with the Staqa logo, a location dropdown set to 'Staqa Delhi', and a fiscal year dropdown set to 'FY 2025-26'. Below the header, there's a 'Packing List' title and a breadcrumb 'Home > List'. To the right of the title are buttons for 'Filter' and 'Create Packing List'. Below the title, there's a 'Show 10 entries' dropdown and an 'Export' button. A search bar is also present. The main table has columns: S.NO, DATE, SERIES, DOC NO., LOCATION, STORE, REV NO, PACKETS, and STATUS. The table contains 8 entries. The first 7 entries have a status of 'Approved', and the 8th entry has a status of 'Draft'. The table is paginated, showing 'Showing 1 to 8 of 8 entries' and a page number '1'.

S.NO	DATE	SERIES	DOC NO.	LOCATION	STORE	REV NO	PACKETS	STATUS
1	15/07/2025	PLIST	8	NOIDA	NOIDA SECTOR 18	0	1	Approved
2	15/07/2025	PLIST	7	NOIDA	NOIDA SECTOR 18	0	1	Draft
3	10/06/2025	PLIST	6	NOIDA	NOIDA SECTOR 18	0	1	Approved
4	10/06/2025	PLIST	5	NOIDA	NOIDA SECTOR 18	0	1	Approved
5	10/06/2025	PLIST	4	NOIDA	NOIDA SECTOR 18	0	1	Approved
6	10/06/2025	PLIST	3	NOIDA	NOIDA SECTOR 18	0	1	Approved
7	09/06/2025	PLIST	2	NOIDA	NOIDA SECTOR 18	0	1	Approved
8	26/05/2025	PLIST	1	NOIDA	BOTANICAL GARDEN	0	1	Approved

- Can be export to:

Print, csv, excel, pdf, copy

This screenshot is similar to the previous one, but the 'Export' button has been clicked, and a dropdown menu is visible. The dropdown menu contains the following options: Print, CSV, Excel, PDF, and Copy. The table data remains the same as in the previous screenshot.

S.NO	DATE	SERIES	DOC NO.	LOCATION	STORE	REV NO	PACKETS	STATUS
1	15/07/2025	PLIST	8	NOIDA	NOIDA SECTOR 18	0	1	Approved
2	15/07/2025	PLIST	7	NOIDA	NOIDA SECTOR 18	0	1	Draft
3	10/06/2025	PLIST	6	NOIDA	NOIDA SECTOR 18	0	1	Approved
4	10/06/2025	PLIST	5	NOIDA	NOIDA SECTOR 18	0	1	Approved
5	10/06/2025	PLIST	4	NOIDA	NOIDA SECTOR 18	0	1	Approved
6	10/06/2025	PLIST	3	NOIDA	NOIDA SECTOR 18	0	1	Approved
7	09/06/2025	PLIST	2	NOIDA	NOIDA SECTOR 18	0	1	Approved
8	26/05/2025	PLIST	1	NOIDA	BOTANICAL GARDEN	0	1	Approved

4.7. Transporter Request

The **Transporter Request** module facilitates the bidding and assignment of transportation tasks between **Requesters** and **Transporters**.

Requesters can initiate a **bid request** by specifying the items to be transported, along with source and destination locations and preferred transport type.

This bid is then sent to registered transporters, who can view the request and place their bids. The requester selects the most suitable bid, after which the chosen transporter has the option to **accept** or **reject** the request.

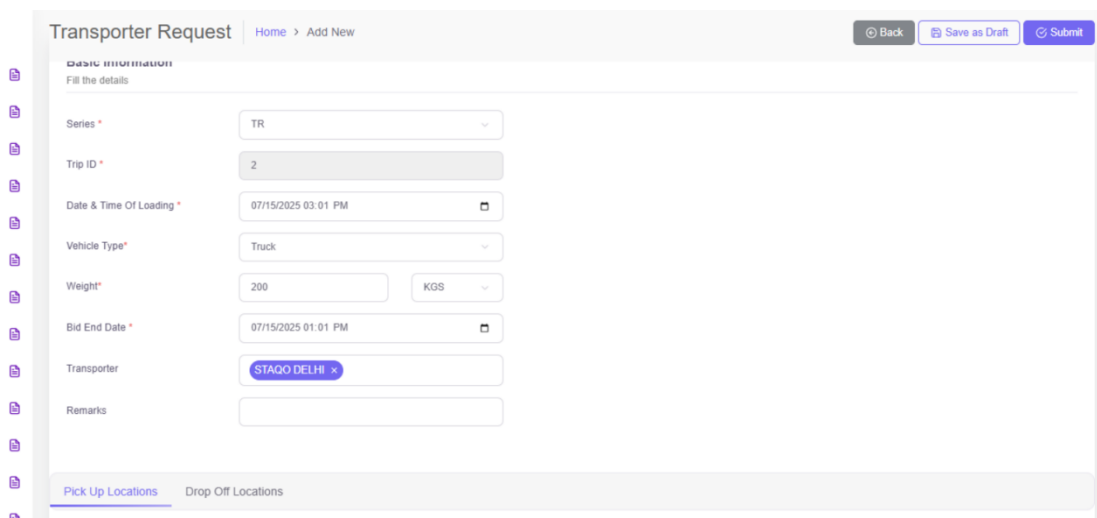
If accepted, the bid is marked as closed; if rejected, the bid is reopened for others. Additionally, if no transporter responds before the bid's expiry, it is automatically marked as expired. This module streamlines transport planning, enhances vendor communication, and ensures transparent selection through competitive bidding.

Create new transporter request

Navigation: Sales>transporter request>Create

Basic details to be filled for creating a transporter request :

- User needs to enter series no., Trip ID, Date and time of loading, vehicle type, weight, Bid end date, Transporter, Remarks
- User needs to provide Pick up locations and Drop off locations with proper details like location name, address, country/region, state, city, pin code, action.



The screenshot displays the 'Transporter Request' form within the Presence360 application. The form is titled 'Transporter Request' and includes a navigation bar with 'Home' and 'Add New' links. On the right side of the header, there are three buttons: 'Back', 'Save as Draft', and 'Submit'. The form is divided into two main sections: 'Basic Information' and 'Pick Up Locations'. The 'Basic Information' section contains the following fields: 'Series' (a dropdown menu with 'TR' selected), 'Trip ID' (a text input with '2'), 'Date & Time Of Loading' (a date and time picker showing '07/15/2025 03:01 PM'), 'Vehicle Type' (a dropdown menu with 'Truck' selected), 'Weight' (a text input with '200' and a unit dropdown with 'KGS' selected), 'Bid End Date' (a date and time picker showing '07/15/2025 01:01 PM'), 'Transporter' (a dropdown menu with 'STAGO DELHI' selected), and 'Remarks' (a text input). The 'Pick Up Locations' section is currently empty, with a 'Drop Off Locations' section visible below it.

Transporter Request [Home](#) > [Add New](#) Back Save as Draft Submit

Vehicle Type*

Weight*


Bid End Date *

Transporter

Remarks

[Pick Up Locations](#) [Drop Off Locations](#)

#	Location Name*	Address*	Country/Region*	State	City*	Pin Code	Action
1	LOC 2	NEW LOCATION OUTSIDE INDIA	Iceland	Austurland	Bakkafjörur	231305	



Success!

Transporter Requests created successfully

[OK](#)

Bid Details [Home](#) > [View](#) Back Close

TripId- 1


Bid End On: 2025-07-15 12:48:00

Time of Loading: 2025-07-15 14:48:00 Weight: 1000.00 K

Transporter Applied [Pick up](#) [Drop Off](#)

#	Transporter Name
---	------------------

Close Bid ×



Success !

Bid Closed Successfully.

[OK](#) [Cancel](#) [Submit](#)

Shortlisted Transporter

Not Shortlisted Yet

Approval History

Rev. No. 0

Pawan 15/07/2025 [Submit](#)

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Bid Details [Home](#) > [View](#) Back Close

TripId- 2

Bid End On: 2025-07-15 13:01:00

Time of Loading: 2025-07-15 15:01:00 Weight: 200.00 K

Transporter Applied [Pick up](#) [Drop Off](#)

#	Location Name	Address
1	New Location	Mayur Vihar Delhi

Close Bid ×

Remarks

Upload Document

[Choose Files](#) [No file chosen](#)

Accept only .PNG, .JPEG, .JPG, .XLS, .DOCX, and .PDF and not more than 5MB in size

[Cancel](#) [Submit](#)

Shortlisted Transporter

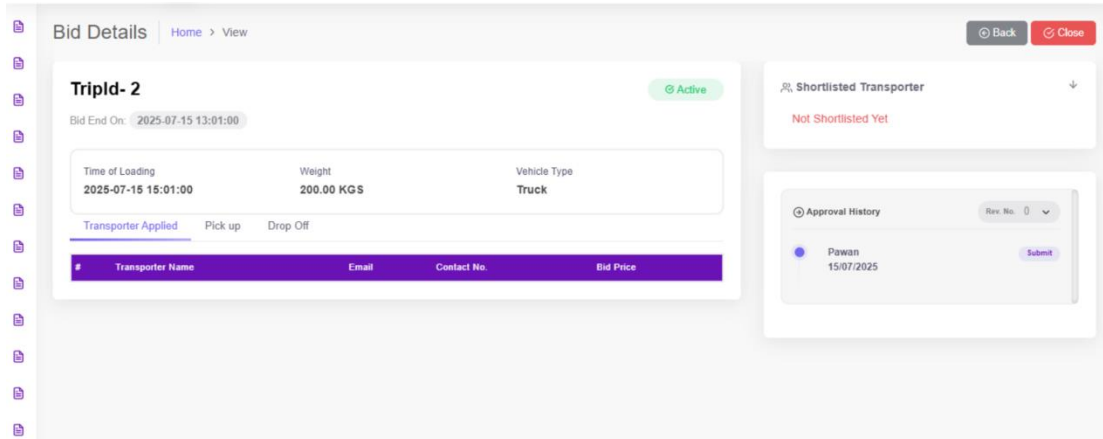
Not Shortlisted Yet

Approval History

Rev. No. 0

Pawan 15/07/2025 [Submit](#)

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4.8. Sales Return

A **Sales Return** happens when a customer sends back goods they previously purchased. This can happen for several reasons, such as damaged products, wrong items delivered, or quality issues.

The Sales Return process helps you record returned items, adjust stock levels, and update customer accounts — either by issuing a refund or credit note.

Navigation: Sales>Sales Return>Create

Basic details to be filled for creating a Sales return :

- User needs to enter series no., document no., doc. Date, doc. type, location, reference no. (if required), reference from (SI) or direct SR
- User needs to provide customer details like currency, consignee name, payment terms if creating direct SR
- After entering customer name other details will be auto populated is customer is referenced from SI
- User needs to enter general information like transporter name, transport mode, vehicle no.
- User needs to enter item details
- User can add expense and discount as well
- User can delete the items as well
- User will be able to upload the documents

Sales Return | Home > Add New

Back Save as Draft Submit

Basic Information
Fill the details

Document Type * Sales Return

Series * SR

Document No * 1

Document Date * 15-Jul-2025

Location * NOIDA

Reference No

Reference From Sales Invoice

Sales Return | Home > Add New

Back Save as Draft Submit

car Road MH12AB1234

Item Detail
Fill the details

Delete + Add Item

Item Code	Item Name	Attributes	UOM	Qty	Rate	Value	Discount	Total	Action
SFSHPR001	PROCESSOR	SIZE: 7	PCS	1.0000	11.0000	11.00	0.00	11.00	
						11.00	0.00	11.00	

Item Details

Specifications: CAPACITIES: 22 WEIGHT: 121 INTERFACE TRANSFER RATE: 21 WINDOWS VERSION: 212
WINDOWS VERSION: 21 WINDOWS VERSION: 12 null: 22

Attributes: SIZE: 7

Confirmed Stock: 120 Unconfirmed Stock: 610

Return Summary Taxes + Discount + Expenses

Item Total	11.00
Item Discount	0.00
Taxable Value	11.00
Taxes	1.98
Total After Tax	12.98
Expenses	0.00
Grand Total	12.98

Save or submit SR

Sales Return | Home > Add New

Back Save as Draft Submit

Basic Information
Fill the details

Document Type * Sales Return

Series * SR

Document No * 1


Document Date * 15-Jul-2025

Location * NOIDA

Reference No

Reference From Sales Invoice

Customer Details



Success!
Sales Return created successfully

OK

SR submitted successfully

Sales Return Home > Add New

Back Generate E-Invoice

Basic Information
Fill the details

Status: **Approved**

Document Type * Sales Return

Series * SR

Document No * 1

Document Date * 15-Jul-2025

Location * NOIDA

Reference No

Approval History Rev. No: 0

Atul 15-07-2025 Submit

Customer Details

SR submitted and approved successfully

Approval:

Approver's login:

Navigate to: Sales>approvals>Sales Return (if approval is required)

- Now user will be able to approve the transaction if Approver name is defined in series else it will be auto approved
- User will be able to generate Invoice

- **Sales Return status will be shown on listing page:**

Approved, draft, submitted, rejected

Return Home > List

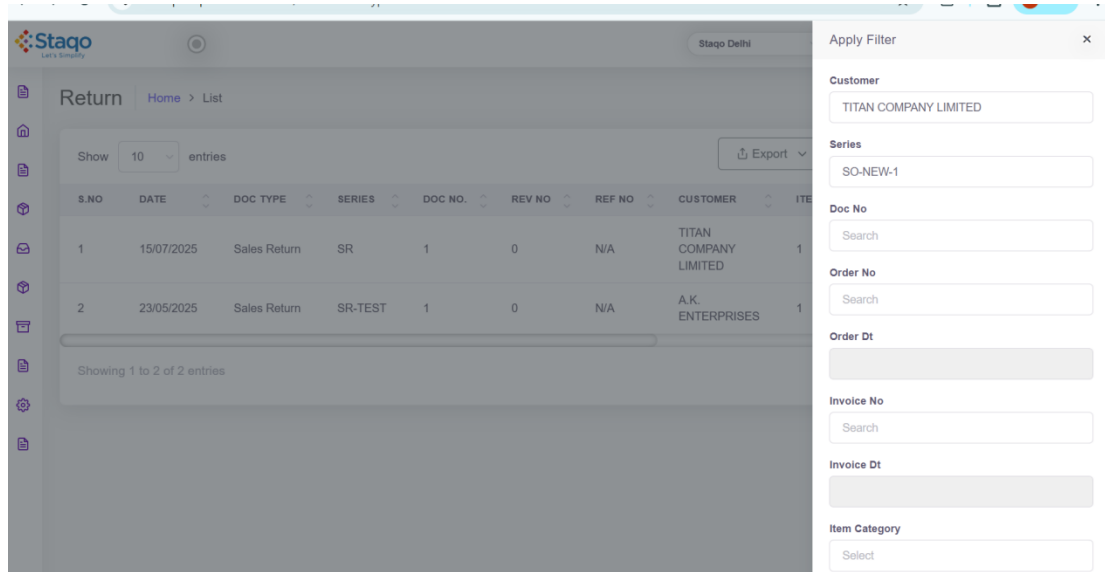
Filter Create Return Report

Show 10 entries Export Search:

S.NO	DATE	DOC TYPE	SERIES	DOC NO.	REV NO	REF NO	CUSTOMER	ITEMS	CURR	ITEM VA	STATUS
1	15/07/2025	Sales Return	SR	1	0	N/A	TITAN COMPANY LIMITED	1	INR		Approved
2	23/05/2025	Sales Return	SR-TEST	1	0	N/A	A.K. ENTERPRISES	1	INR	56,2	Approved

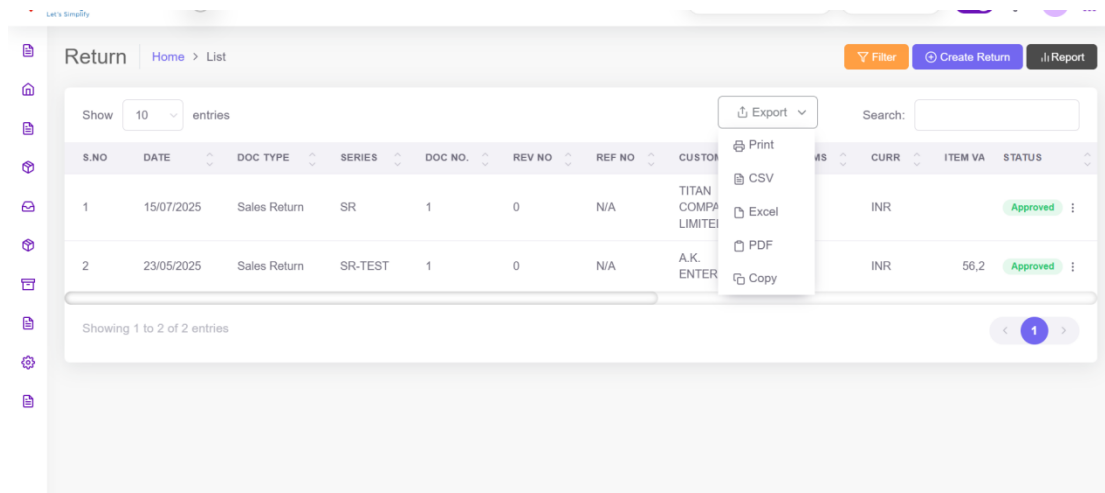
Showing 1 to 2 of 2 entries

- Sales Return can be filtered by entering customer, series, doc no. etc



- Can be export to:

Print, csv, excel, pdf, copy



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

