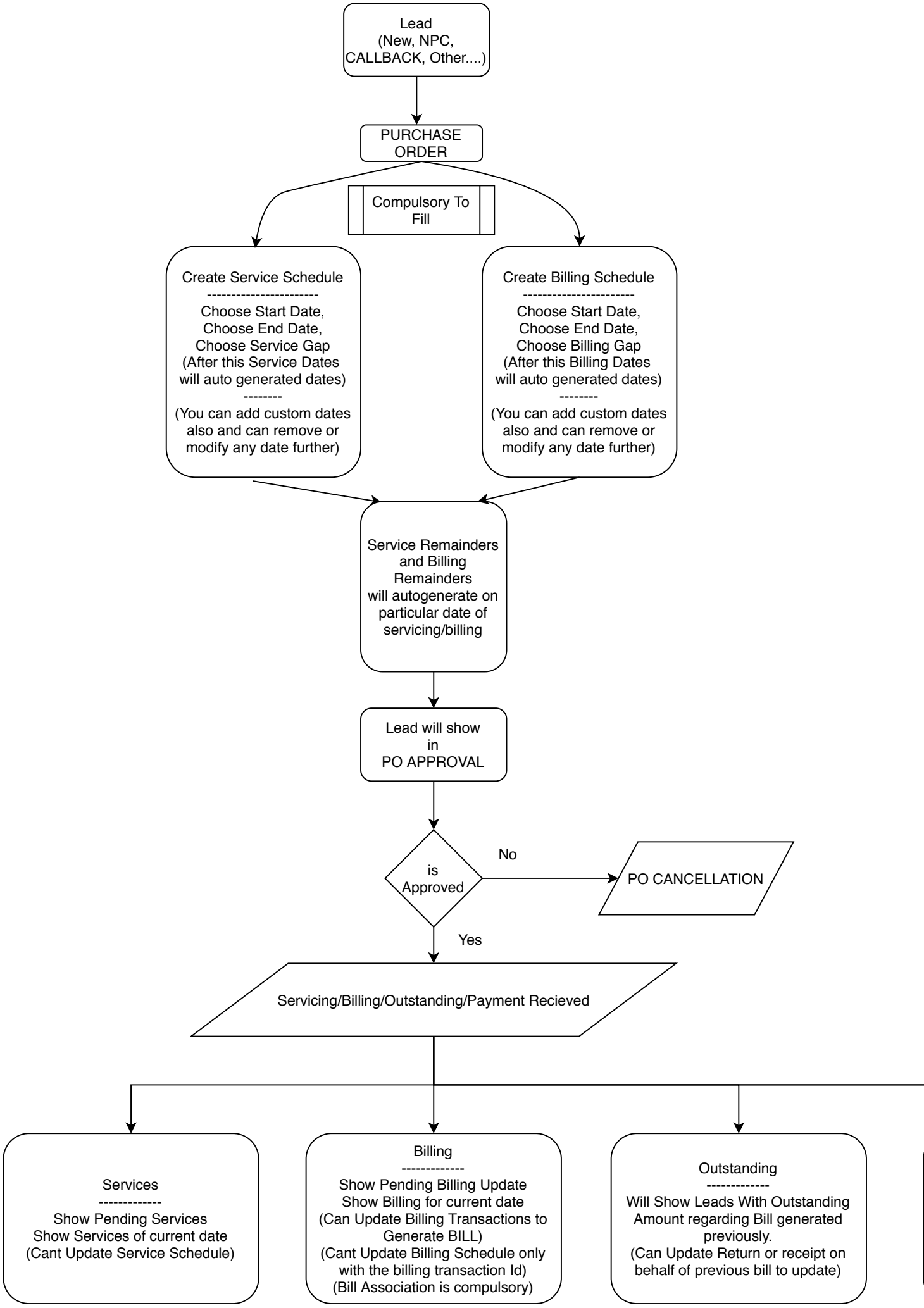

Lead
(New, NPC,
CALLBACK, Other....)
PURCHASE
ORDER
Compulsory To
Fill
Create Service Schedule

Choose Start Date,
Choose End Date,
Choose Service Gap
(After this Service Dates
will auto generated dates)

(You can add custom dates
also and can remove or
modify any date further)
Create Billing Schedule

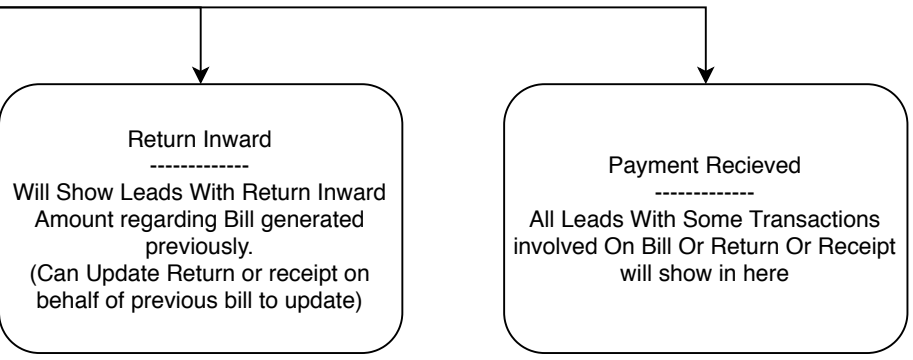
Choose Start Date,
Choose End Date,
Choose Billing Gap
(After this Billing Dates
will auto generated dates)

(You can add custom dates
also and can remove or
modify any date further)
Service Remainders
and Billing
Remainders
will autogenerate on
particular date of
servicing/billing
Lead will show
in
PO APPROVAL
is
Approved
No
PO CANCELLATION
Yes
Servicing/Billing/Outstanding/Payment Recieved
Services

Show Pending Services
Show Services of current date
(Cant Update Service Schedule)
Billing

Show Pending Billing Update
Show Billing for current date
(Can Update Billing Transactions to
Generate BILL)
(Cant Update Billing Schedule only
with the billing transaction Id)
(Bill Association is compulsory)
Outstanding

Will Show Leads With Outstanding
Amount regarding Bill generated
previously.
(Can Update Return or receipt on
behalf of previous bill to update)


Return Inward

Will Show Leads With Return Inward Amount regarding Bill generated previously.
(Can Update Return or receipt on behalf of previous bill to update)
Payment Recieved

All Leads With Some Transactions involved On Bill Or Return Or Receipt will show in here