



SugrivaX ERP Modules Features

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Accounting	CRM & Sales	Manufacturing & EAM	Human Resource
Full Accounting	Sales	Manufacturing/BOM	HRMS Core
Invoicing	Point of Sale	Quality	Recruitment
Expenses	CRM	Maintenance	Attendance
	Contacts		Employees
			HR Dashboard
Inventory	Websites	Productivity	Time Off
Inventory	Website Builder	Projects	Branch Transfer
Purchase	Live Chat	Time Sheets	Employee Self Service
Repairs	e-Commerce	WhatsApp Integration	Employee Contracts
	e-Learning	Discuss	Skill Management
	Subscription	Surveys	HR Pay-roll
Marketing			Lunch
Email Marketing			Fleet
SMS Marketing			Resignation
Events			

1. Full Accounting Module Features

Features of the Accounting Module - a robust, integrated solution designed for both SMEs and enterprises to manage their full financial operations.

Accounting Module: Features

1. Purpose

The Accounting module in **SugrivaX ERP** manages the entire financial lifecycle — from journal entries to tax reporting. It's fully integrated with other modules (Sales, Purchase, Inventory, CRM, Payroll, Projects) for real-time accounting and compliance.

2. Key Features

A. Core Accounting

- Chart of Accounts (COA): Country-specific and customizable
- Journal Entries: Automatic & manual entries, linked to transactions
- Bank & Cash Journals: For cash, bank, and petty cash management
- Double-Entry Bookkeeping: Standard for all operations

B. Accounts Receivable (AR)

- Customer Invoices & Credit Notes
- Payment Follow-ups & Reminders
- Aging Reports (Receivables by due date)
- Customer Statements

C. Accounts Payable (AP)

- Vendor Bills & Refunds
- 3-Way Matching: Purchase order, receipt, and bill
- Vendor Payments Scheduling
- Aging Payables Report

D. Bank & Reconciliation

- Bank Statement Import: CSV/OFX/QIF/MT940 or bank sync (depending on region)
- Smart Reconciliation Suggestions
- Manual & Batch Reconciliation
- Check Printing & Deposit Slips

E. Taxes & Compliance

- Multi-Country Tax Support (GST, VAT, etc.)
- Automated Tax Mapping & Calculation
- GST/VAT Return Generation
- Reverse Charges, Withholding Tax (TDS)

3. Financial Reporting

Type	Includes
Standard Reports	Profit & Loss, Balance Sheet, Cash Flow
Audit Reports	General Ledger, Trial Balance, Journal Audit
Tax Reports	GST Return, VAT Statement, Intrastat
Custom Reports	Via SugrivaX ERP Studio or third-party apps. Reports are exportable in XLS, PDF, and dynamic views.

4. Integration with Other Modules

Module	Key Integration
Sales	Customer invoices auto-generated
Purchase	Vendor bills auto-created from PO
Inventory	Stock valuation and COGS accounting
Projects	Track time/cost and auto-bill clients
Payroll	Journals for salary, PF, ESI, TDS
Expenses	Claims linked to accounting and payable cycles

5. Globalization Support

- Multi-Currency Accounting
 - Multi-Company Setup
 - Consolidation for Group Companies
 - Country-specific Localizations (India, EU, US, GCC, etc.)
-

6. Security & Audit Trail

- Role-Based Access
 - Audit Logs
 - Document Digitization & Attachments
 - Internal Notes & Approvals
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7. Automation & Smart Features

- AI-Based Invoice OCR (Document Recognition)
 - Automated Reconciliation & Suggestions
 - Recurring Entries (like rent, EMI, subscriptions)
 - Deferred Revenues & Prepayments
 - Asset Management & Depreciation Schedules
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8. Advanced Add-ons

- Budgeting & Forecasting
 - Analytic Accounting (for project/cost center tracking)
 - Asset Management
 - Fiscal Year Closing & Audit Lock Dates
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9. Use Cases

- Automate billing, collections, and payments
- Real-time financial visibility for decision-makers
- Statutory compliance with GST/VAT/Income Tax
- Consolidated group reporting
- Streamlined month-end/year-end closing

2. Invoicing Module Features

Here's a clear and structured list of features of the Invoicing module in **SugrivaX ERP**, one of the most frequently used modules for managing customer and vendor billing efficiently.

Invoicing Module: Features

1. Purpose

The Invoicing module in **SugrivaX ERP** is designed to help businesses generate, send, track, and manage invoices — including both customer invoices and vendor bills. It's deeply integrated with Accounting, Sales, Purchase, CRM, and Subscription modules for a seamless financial flow.

2. Key Features

A. Customer Invoices

- Generate invoices from:
 - o Sales orders
 - o Delivery orders
 - o Time sheets or expense sheets
- Partial and full payment options
- Manage credit notes and refunds
- Recurring invoices (subscriptions, retainers)

B. Vendor Bills

- Register bills manually or import them via email or OCR
- Match with purchase orders and receipts (3-way matching)
- Schedule payments
- Credit note management

C. Payments

- Link payments with invoices
- Multi-currency support with automatic conversion
- Online payment integrations (Stripe, PayPal, Razorpay, etc.)
- Bank statement reconciliation with invoices

D. Due Dates & Reminders

- Configure payment terms (Net 30, Net 60, custom)
 - Send automated reminders
 - Track overdue invoices
 - Customer follow-ups and escalation
-

3. Reporting & Dashboards

Report Type	Details
Aging Reports	View overdue invoices by period
Revenue Reports	Income from products/services
Payment Reports	Received, pending, partial
Customer Statement	Full account ledger view

4. Integration with Other Modules

Module	How It Integrates
Sales	Auto-generates invoice from quotation/order
Accounting	Pushes invoice details into general ledger
CRM	Enables invoice tracking linked to leads/opportunities
Inventory	Triggers invoice based on delivery
Projects/Timesheets	Bill time and materials directly
Purchase	Converts PO to vendor bill easily

5. Automation and Smart Features

- Invoice Templates & Customization
 - Automatic Tax Mapping
 - Electronic Invoicing (e-Invoice) support (in selected countries like India, UAE, Mexico)
 - OCR for vendor bills (extracts and auto-fills data)
 - Payment Matching Suggestions
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6. Multi-Country Support

- Supports multiple tax regimes (e.g., GST, VAT, Sales Tax)
 - Localization packages for invoicing standards and formats
 - Multi-currency with real-time exchange rate support
 - e-Invoicing compliant with Indian GST portal and global regulations
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7. Security & Audit Trail

- User access controls (Finance Managers, Invoicing Officers)
 - Approval flows (optional)
 - Full logging of changes
 - Attach scanned documents, POs, and contracts
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8. Use Cases

- Automating monthly retainer invoices
 - Streamlining project billing
 - Managing vendor invoices with 3-way match
 - Handling advance payments and deposits
 - Generating GST-compliant invoices in India
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9. Types of Invoices Supported

- Regular Customer Invoice
 - Vendor Bill
 - Refund / Credit Note
 - Pro-forma Invoice
 - e-Invoice (Govt-compliant XML+IRN+QR Code in India)
 - Recurring Invoice (subscription billing)
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Sample Workflow: Sales to Invoicing

Quotation → Sales Order → Delivery → Invoice → Payment → Reconciliation

3. Inventory Module Features

Features of the Inventory Module in **SugrivaX ERP**, which forms the core of supply chain and stock management across industries.

Inventory Module: Features

1. Purpose

The Inventory module in **SugrivaX ERP** is designed to manage all aspects of warehouse operations, from receiving goods to internal movements, storage, delivery, and stock valuation. It supports real-time visibility, barcode scanning, multi-location setups, and complex logistics operations.

2. Key Features

A. Warehouse Management

- Define multiple warehouses & locations (bins, racks, zones)
- Hierarchical structure: Warehouse → Zone → Location
- Route-based logistics (Push, Pull, Make-to-Order, Dropship)
- Stock rules: min/max levels, reorder points

B. Product Tracking

- Track products by:
 - o Lot numbers
 - o Serial numbers
 - o Expiry dates (perishable goods)
- Units of Measure (UoM) and conversions
- Product types: stockable, consumable, service

C. Inventory Operations

- Goods Receipt (GRN)
- Internal transfers
- Picking and packing
- Delivery orders (DO)
- Inventory adjustments
- Scrap management
- Cycle counts and physical inventory

D. Stock Moves and Traceability

- Full traceability from supplier to customer
- Real-time updates of stock moves
- Smart move history tracking
- Trace products via lot/serial for recalls or audits

3. Integration with Other Modules

Module	Purpose of Integration
Sales	Trigger deliveries from confirmed sales orders
Purchase	Auto-receipt from vendor POs
Manufacturing (MRP)	Raw material consumption & finished goods output
Accounting	Real-time stock valuation, COGS accounting
Barcode	Streamline warehouse operations
POS/eCommerce	Sync stock in-store and online

4. Reporting & Dashboards

Report Type	Key Insights
Inventory Valuation	Stock value by product/category
Forecasted Inventory	Future availability based on demand/supply
Product Moves	Inbound, outbound, and internal transfers
Stock Aging	FIFO/LIFO aging reports
Warehouse Performance	Lead time, processing time, picking delays

5. Advanced Features

A. Barcode & Scanner Support

- End-to-end scanning of receiving, picking, packing
- Mobile-friendly interface
- Reduces human errors in high-volume warehouses

B. Multi-Company & Multi-Warehouse

- Share or restrict stock across companies
- Central or local warehousing models
- Virtual locations (e.g., Transit, Dropship, Scrap)

C. Valuation & Costing

- Costing methods:
 - o Standard Price
 - o Average Cost (AVCO)
 - o First-In-First-Out (FIFO)
- Perpetual or periodic inventory valuation
- Integration with Accounting for automatic journal entries

D. Automated Replenishment

- Reorder rules and procurement triggers
 - Minimum stock level alerts
 - Just-in-time delivery support
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6. Mobile & User Roles

- Warehouse users: picking, receiving, internal moves
 - Inventory managers: configuration and adjustments
 - Mobile UI with real-time sync for field workers
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7. Typical Use Cases

- Retail inventory tracking
- Manufacturing WIP & raw material stock

- Service industry: consumables tracking
 - eCommerce businesses with multi-channel fulfillment
 - Third-party logistics (3PL) warehousing
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Sample Inventory Flow:

PO Confirmed → Receive Products → Put Away → Internal Transfer (optional) → Pick & Pack → Delivery → Update Inventory Valuation

4. Purchase Module Features

Here's a structured and concise list of features of the Purchase Module in **SugrivaX ERP**, which is central to procurement and supplier management.

Purchase Module: Features

1. Purpose

The Purchase module in **SugrivaX ERP** enables businesses to manage procurement operations efficiently—from vendor selection to purchase order creation, product reception, and invoice management. It ensures cost control, vendor performance tracking, and real-time integration with inventory and accounting.

2. Key Features

A. Purchase Requisition & Orders

- Create Purchase Orders (POs) manually or automatically (based on stock levels)
- Request for Quotation (RFQ) workflow for competitive bidding
- Convert RFQs to confirmed POs
- Manage blanket orders and call-offs

B. Vendor Management

- Maintain vendor master with:
 - o Contacts, price lists, payment terms, delivery lead time
- Track multiple vendors per product
- Preferred vendor selection
- Historical pricing and purchase trends

C. Price Lists & Agreements

- Vendor-specific pricing
- Volume discounts
- Time-bound contracts or framework agreements
- Comparison of vendor quotations

D. Product & Service Purchasing

- Buy stockable goods, consumables, and services
 - Support for Units of Measure (UoM)
 - Purchase description and tax setup
 - Set purchase routes (e.g., dropshipping, direct delivery)
-

3. Integration with Other Modules

Module	Integration Purpose
Inventory	Auto trigger GRNs, stock updates
Accounting	Vendor bills, tax handling, cost accounting
Sales	MTO or dropship based on Sales Order
Manufacturing (MRP)	Buy raw materials as per BOM or work orders
Approvals	Multi-level approvals for POs
Expenses	Record service or indirect purchases

4. Billing & Invoicing

- Match vendor bill with:
 - o Purchase Order (2-way)
 - o Receipt (3-way match)
 - Auto-generate vendor bills from receipt
 - Track outstanding bills and payment status
 - Multi-currency support with exchange rate handling
-

5. Reporting & Dashboards

Report Type	Insights Provided
Purchase Analysis	Vendor, category, product-wise
Lead Time Reports	Supplier delivery performance
Price History	Fluctuations over time
RFQ to PO Conversion	Quotation success rates
Purchase Forecast	Budget vs. actual, procurement planning

6. Automation & Smart Features

- Reordering Rules: Auto-generate POs based on min-max levels
- Procurement Rules: Trigger purchase based on MTO, demand forecasts
- Vendor Rating: Based on delivery reliability, price, and quality

- Email Integration: RFQs sent directly from the system
 - Attachment Management: Upload terms, contracts, specifications
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7. Advanced Features (Enterprise)

- Purchase Tendering
 - Blanket Orders
 - Digital Signature for Purchase Orders
 - Approval Flows based on amount, vendor, or category
 - Vendor Portal (for submission of quotations)
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Sample Procurement Workflow:

Need Identified → RFQ → Vendor Selection → PO Approval → Product Receipt → Vendor Bill → Payment

8. Common Use Cases

- Raw material procurement for manufacturing
- Indirect procurement for services, facilities
- Bulk purchases in retail or wholesale
- IT and fixed asset procurement
- Dropshipping fulfillment

5. Repairs Module Features

Features of the Repairs Module in **SugrivaX ERP**, especially useful for businesses managing after-sales services, refurbishments, or internal repairs.

SugrivaX ERP Repairs Module: Features

1. Purpose

The Repairs module in **SugrivaX ERP** is designed to handle product repairs—whether under warranty, as paid service, or internal maintenance. It is especially relevant for electronics, automotive, machinery, and service-oriented industries where returned goods need repair, inspection, or replacement.

2. Key Features

A. Repair Orders (RO)

- Create and track Repair Orders (manual or from Sales Returns)

- Add operations and components for each repair
- Assign technician or team
- Set status: New → In Progress → Repaired → Delivered

B. Repair Actions

- Replace parts/components
- Add labor/service cost
- Record time spent
- Add or remove spare parts from inventory
- Scrapping of damaged parts

C. Invoicing Options

- Repairs can be:
 - o Under warranty: no charge
 - o Out of warranty: invoiceable
- Choose before or after repair invoicing
- Integration with Accounting for automatic invoice creation

D. Inventory Integration

- Parts used in repair are pulled from stock
- Updated stock levels for:
 - o Used parts (consumed)
 - o Returned parts (if scrapped or restocked)
- Track repaired products with serial/lot numbers

3. Integration with Other Modules

Module	Integration Purpose
Inventory	Consume/add products, track movements
Sales	Repairs from returned or sold items
Invoicing	Billable repair services or parts
Manufacturing	Common for in-house refurbishing (optional)
CRM/Helpdesk	Service tickets linked to repairs (Enterprise)

4. Repair Workflow Example

Create Repair Order → Diagnose → Add Parts & Services → Approve → Repair in Progress → Test → Close & Deliver → Invoice (if needed)

5. Reporting & Dashboards

Report Type	Insights Provided
Repair Orders by Status	In progress, done, canceled
Repair Cost Analysis	Labor vs. parts
Warranty vs Paid Jobs	Volume tracking
Technician Performance	Time per repair, quantity done
Component Usage	Frequently replaced parts

6. Smart Functionalities

- Barcode support for product identification
 - Notes and logs for each repair activity
 - Linked documents or images (diagnosis report, service logs)
 - Track multiple repairs per product or customer
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7. Configuration & Customization

- Set default repair fees, operations, and templates
 - Define repair teams or assign user roles
 - Customize repair reasons, stages, and notifications
 - Add approval steps or validation conditions
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8. Typical Use Cases

- Consumer electronics: phones, laptops
 - Automotive workshops: vehicle parts and labor
 - Industrial machinery: refurbishing or replacement
 - Internal maintenance: office or factory equipment
 - Retail returns & warranty servicing
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Benefits

- End-to-end visibility of service lifecycle
 - Streamlined warranty vs paid repair tracking
 - Accurate inventory and cost reflection
 - Better customer satisfaction via organized repair process
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6. Sales Module Features

Features of the Sales Module in **SugrivaX ERP**, one of the most business-critical components for revenue generation and order management.

1. Purpose

The Sales module in **SugrivaX ERP** helps businesses manage their complete sales lifecycle — from quotations to order confirmation, delivery, invoicing, and customer communication. It streamlines B2B and B2C operations with deep integrations across CRM, Inventory, Accounting, and Invoicing.

2. Key Features

A. Quotation Management

- Create and send customized quotations
- Set validity dates, discounts, and payment terms
- Quote templates for faster turnaround
- Convert quotations to sales orders in one click

B. Sales Orders (SO)

- Auto-generation from approved quotes
- Manage line items: products, services, delivery charges
- Sales approval workflows (optional)
- Track order status: draft → confirmed → delivered → invoiced

C. Pricing & Promotions

- Pricelists based on customer groups, quantity, season
- Discount policies: fixed or percentage
- Promotional schemes, coupons, and loyalty integration
- Multi-currency and tax-inclusive pricing

D. Product Catalog

- Sell physical goods, digital products, or services
 - Product variants (size, color, etc.)
 - Stock availability visibility during quoting
 - Optional integration with eCommerce module
-

3. Integration with Other Modules

Module	Integration Purpose
CRM	Convert leads/opportunities to quotations
Inventory	Check stock, trigger delivery
Accounting	Invoice generation, tax calculation
Invoicing	Customer billing, credit notes

Module	Integration Purpose
Purchase	Make-to-order products trigger purchase requisition
Subscription	For recurring services/products

4. Reporting & Analytics

Report Type	Key Insights
Sales Analysis	Revenue by salesperson, product, region
Quotation Reports	Won/lost deals, quotation conversion rates
Margin Reports	Profitability by SO line item
Forecast Reports	Expected revenues and pipeline accuracy

5. Smart Tools and Automation

- E-Signature for quote approval
 - Customer Portal to view orders, download invoices
 - Auto-follow ups for quote approval/reminders
 - Online payments (Stripe, Razorpay, PayPal)
 - Multi-language, multi-currency support
-

6. User Roles & Access Rights

- Define roles like:
 - o Sales User (can create/edit orders)
 - o Sales Manager (approve large orders)
 - o Sales Admin (reporting, pricing updates)
 - Access controls to specific product categories or customers
-

7. Global Readiness

- Supports multi-currency, multi-company, and multi-tax regimes
 - Localized for country-specific tax systems (e.g., India GST, EU VAT, GCC)
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8. Use Cases

- B2B sales with complex quote flows
- Product + Service bundled sales
- Subscription/retainer billing
- Agent or reseller-based order processing
- Multi-channel sales (field sales + online)

Sample Sales Workflow

Lead → Quotation → Sales Order → Delivery → Invoice → Payment

7. POS (Point of Sale) Module Features

Features of the Point-of-Sale (PoS) Module in **SugrivaX ERP**, designed to cater to retail, restaurants, and service outlets in both online and offline modes.

SugrivaX ERP Point of Sale (PoS) Module: Features

1. Purpose

The PoS module provides a touchscreen-based, real-time retail interface for managing counter sales, whether in a physical store, café, restaurant, or event stall. It connects seamlessly with inventory, accounting, CRM, and eCommerce for a unified experience.

2. Key Features

A. User-Friendly POS Interface

- Touchscreen-optimized
- Keyboard + barcode scanner compatible
- Multi-session and multi-terminal support
- Fast product search and scan

B. Sales Operations

- Create and process sales orders in real time
- Accept multiple payment methods:
 - o Cash, card, wallet, voucher, split payments
- Print or email receipts directly
- Handle returns and refunds easily

C. Product Catalog & Variants

- Category-based product organization
- Product images and quick access buttons
- Supports product variants (size, color, etc.)
- Manage bundled products or combo offers

D. Price Lists & Discounts

- Real-time application of pricelists
- Manual/automated discounts per item or bill
- Happy hour, promotions, or loyalty-based discounts
- Coupon code support

3. Integration with Other Modules

Module	Function
Inventory	Real-time stock deduction and replenishment
Accounting	Journal entries for sales, tax, and payments
CRM	Customer profiles and loyalty linked to CRM
Sales	Centralized reporting across channels
eCommerce	Unified backend for online & offline sales
Loyalty	Track and redeem loyalty points in-store

4. Online & Offline Capability

- Offline Mode: Works without internet; syncs data once reconnected
 - Browser-Based: No installation needed
 - Supports tablets, desktops, and industrial PoS terminals
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5. Smart Tools

- Barcode scanner integration
 - Customer wallet & credit support
 - Table/seat management (restaurant-specific)
 - Kitchen printing & order routing
 - Mobile/Tablet interface for waiters
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6. Reports & Dashboards

- Sales by location, cashier, product
 - Shift reports: opening balance, cash in/out, closing
 - Top-selling items
 - Tax report summary by day/session
 - Stock movement due to PoS
-

7. Customer Management

- Add and manage customer profiles at checkout
 - Loyalty programs, points, and rewards
 - Payment on account (for B2B customers)
 - Email receipts and invoices
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8. Security & Permissions

- POS session control and shift management
 - Role-based access (cashier, supervisor, manager)
 - Cash control (opening/closing balance)
 - Restrict price or discount modification by user
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9. Industry Use Cases

- Retail chains (apparel, electronics, groceries)
 - Restaurants & cafes
 - Spas and wellness centers
 - Pharmacies
 - Bookstores
 - Pop-up stores and events
-

Sample Workflow: Retail PoS

Open Shift → Add Products → Apply Discounts → Process Payment → Print Receipt → Close Shift

8. CRM Module Features

Features of the CRM (Customer Relationship Management) Module in **SugrivaX ERP**, which is central to driving sales efficiency, improving customer interactions, and managing pipelines.

SugrivaX ERP CRM Module: Features

1. Purpose

The CRM module in **SugrivaX ERP** helps businesses track leads, manage opportunities, and close deals effectively. It's designed to give a 360-degree view of the customer journey, from first contact to final sale, with automation and reporting built-in.

2. Key Features

A. Lead Management

- Capture leads via:
 - o Web forms
 - o Email aliases
 - o Import (Excel/CSV)
 - o Integration with SugrivaX Marketing, Website, or third-party tools
- Auto-assign leads based on rules (region, product, salesperson)
- Lead scoring and qualification

B. Opportunity Pipeline

- Visual Kanban view for drag-and-drop deal stages
- Customizable sales stages: New → Qualified → Quotation → Won/Lost
- Probability tracking for revenue forecasting
- Color-coded priority and tags
- Merge duplicate opportunities

C. Activities & Communication

- Schedule follow-ups, calls, meetings
- Sync with calendar (Google, Outlook)
- Email templates and logging
- In-app VoIP support
- Customer communication history at a glance

D. Email & Marketing Integration

- Launch campaigns directly from CRM
- Auto-generate leads from email replies
- Track open/click rates
- Link to Marketing Automation module for nurturing workflows

3. Integration with Other Modules

Module	Integration Purpose
Sales	Convert opportunities to quotations/Sales Orders
Marketing	Campaigns and lead nurturing
Invoicing	Invoicing from closed deals
Helpdesk	Unified view of tickets and sales
Subscription	Subscription lifecycle and upselling
Website	Lead generation via contact forms

4. Reporting & Dashboards

Report Type	Insights Gained
Pipeline Analysis	Stages, expected revenue, win rates
Lead Conversion	Source-based analysis
Sales Team KPIs	Performance tracking
Lost Opportunities	Loss reason trends
Forecast Reports	Revenue projections by period

5. Smart Features

- Lead scoring using AI/ML (enterprise version)
 - Duplicate detection & merging
 - Geo-location of leads
 - Real-time activity alerts
 - Mobile app access for field sales
-

6. Team Management

- Assign opportunities to teams or individuals
 - Define targets and track achievement
 - Role-based access (Sales Rep, Sales Manager)
 - Team-based dashboard and filters
-

7. Customization

- Create custom fields for leads/opportunities
 - Add new sales stages
 - Define unique KPIs per product line or region
 - Automated actions (e.g., send email when deal stage changes)
-

8. Multi-Channel, Multi-Country Ready

- Handle leads in multiple currencies and languages
 - Region-specific teams and campaigns
 - GDPR-compliant data handling
 - Lead routing based on country or industry
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9. Common Use Cases

- B2B lead-to-quote-to-order pipeline
 - Service sales teams following up on inquiries
 - Product sales with multiple decision makers
 - Channel partner sales tracking
 - Franchisee or territory-based CRM
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Sample Workflow: From Lead to Customer

Lead → Qualify → Opportunity → Quotation (via Sales) → Won → Customer Onboarding

9. Contacts Module Features

The Contacts module in **SugrivaX ERP** is a foundational component used across multiple apps such as CRM, Sales, Purchase, and Invoicing.

1. Purpose

The Contacts module serves as a central database for managing individuals and companies (partners) that interact with your business. This includes customers, vendors, leads, employees, and even banks.

2. Core Features

A. Contact & Company Management

- Create and manage Individuals and Companies
- Organize contacts in a hierarchical structure (Parent company with multiple child contacts)
- Tagging system for categorization (e.g., Vendor, Customer, VIP)
- Option to mark contacts as Customer or Vendor

B. Contact Details

- Addresses (invoicing, delivery, others)
- Phone numbers, mobile, email
- Website and social media
- Tax Identification (TIN, GSTIN, VAT, etc.)
- Language preference

C. Internal Notes & History

- Add internal notes (visible only to internal users)
- See message history and chatter log
- Track activities (calls, meetings, tasks, etc.)

D. Multi-Address & Multi-Currency Support

- Define multiple addresses for each contact
 - Automatic currency adaptation per contact based on location
-

3. Integrations with Other Modules

Module	How it Integrates
CRM	Leads/opportunities are tied to contacts
Sales	Customers used in quotations and sales orders

Module	How it Integrates
Invoicing/Accounting	Invoices are generated for contacts; manage payables/receivables
Purchase	Vendors selected from contact list
Inventory	Addresses used for delivery/receiving locations
Marketing Automation	Contacts serve as campaign targets

4. Views and Usability

- Kanban, List, Form, and Map views
 - Smart buttons for:
 - o Meetings
 - o Opportunities
 - o Invoices
 - o Sales Orders
 - Filters and groupings for segmentation
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5. Access Rights

- Controlled by user roles and record rules
 - Certain fields are editable only by internal users with specific access
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6. Customization & Extensions

- Add custom fields via SugrivaX Studio or developer mode
 - Extend to include custom workflows (e.g., approval steps, KYC documents)
 - Add modules like:
 - o Partner Autocomplete: Fetches company data from external databases
 - o Contacts Multi Emails: For adding multiple emails per contact
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7. Typical Use Cases

- Maintaining centralized contact book for all business entities
 - Customer segmentation for sales campaigns
 - Supplier management for purchasing
 - Managing stakeholder details for ESG reporting or compliance
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10. Manufacturing Module Features

Features of the Manufacturing Module, which is central to managing production operations in discrete and process industries.

1. Purpose

The Manufacturing (MRP) module in **SugrivaX ERP** is designed to plan, execute, and track the production process, enabling manufacturers to manage Bill of Materials (BoM), Work Orders, Routing, Production Scheduling, and Inventory Movements efficiently.

It supports discrete, custom, and process manufacturing, with seamless integration into inventory, procurement, quality, and maintenance workflows.

2. Key Features

A. Bill of Materials (BoM)

- Define components, operations, and work centers
- Multiple BoMs per product (standard, variant-based, phantom)
- Support for:
 - o BoM for assembly
 - o Kits (non-stocked)
 - o Sub-assemblies and multi-level BoMs

B. Manufacturing Orders (MO)

- Generate MOs from Sales Orders (Make-to-Order) or Replenishment
- Reserve raw materials
- Consume components (manual or automatic)
- Record production output and by-products
- Track production status: Draft → Confirmed → In Progress → Done

C. Work Orders & Routing

- Define steps for production: each operation assigned to a Work Centre
- Capture:
 - o Start/end time
 - o Duration
 - o Downtime
 - o Operator assignment
- Monitor capacity and bottlenecks

D. Production Planning & Scheduling

- Master Production Schedule (MPS)
 - Gantt chart view of work centres
 - Real-time availability check of materials
 - Work order prioritization and queuing
-

3. Integration with Other Modules

Module	Purpose of Integration
Inventory	Reserve/consume materials, track finished goods
Purchase	Auto-buy materials if not in stock
Quality	Trigger inspections on raw material or WIP
Maintenance	Schedule preventive/corrective tasks
Accounting	Cost tracking via work centres and products
Sales	Make-to-order triggering from confirmed SOs

4. Reporting & KPIs

Report Type	Key Insights
Manufacturing Efficiency	Time vs expected duration
Work Centre Utilization	Capacity and usage stats
BoM Costing	Estimated vs actual cost
Scrap Analysis	By product, reason, or work centre
Production Performance	MO completion, delays, and throughput

5. Smart Features

- Backflushing: Auto-consume materials at completion
 - Barcode scanning for work orders, operations, and products
 - Lot/Serial Tracking throughout production
 - Subcontracting: Send components to third parties, receive finished goods
 - Variant BoMs for product configurations
 - By-products & Scrap tracking during processing
-

6. Advanced Functionalities (Enterprise)

- Master Production Schedule (MPS): Monthly/weekly planning
 - Work Centre Capacity Planning
 - OEE Metrics (Overall Equipment Efficiency)
 - Tablet Interface for operators on the shop floor
 - Production Cost Analysis with labour, material, overhead
 - PLM (Product Lifecycle Management): Engineering change orders, document control
-

7. Sample Manufacturing Workflow

Sales Order / Demand → Generate MO → Reserve Materials → Execute Work Orders →

Record Time & Output → Quality Check (optional) → Move Finished Goods to Stock → Close MO

8. Typical Use Cases

- Discrete Manufacturing: Furniture, electronics, auto parts
 - Process Manufacturing: Chemicals, food, beverages
 - Custom Engineering: Project-based production
 - Subcontracted Production: Where operations are outsourced
 - Batch Manufacturing: Pharmaceuticals or FMCG
-

Benefits

- Real-time tracking of production activities
- Minimized stock-outs and overproduction
- Optimized resource planning (human and machine)
- Cost visibility and variance analysis
- Quality control at each stage

11. Quality Module Features

SugrivaX ERP Quality Module: Features

1. Purpose

The Quality module in **SugrivaX ERP** is designed to define, implement, and monitor quality control processes at every stage of operations—from procurement to production to delivery. It supports ISO and industry-compliant workflows, helping companies ensure product consistency, traceability, and customer satisfaction.

2. Key Features

A. Quality Control Points

- Define control points at:
 - o Incoming inspection (vendor)
 - o In-process inspection (WIP)
 - o Final inspection (before delivery)
- Trigger inspections automatically based on product, vendor, or operation
- Define control criteria per product, category, operation, or work centre

B. Quality Checks

- Manual or automated checks:
 - o Pass/Fail
 - o Measurement (e.g., size, weight)

- o Visual inspection
- Support for instructions and file attachments (e.g., spec sheets, drawings)
- Log results directly into the system

C. Quality Alerts

- Raise alerts for:
 - o Non-conformance
 - o Defects
 - o Customer complaints
- Assign root cause, responsible team, and resolution actions
- Configure alert stages: Reported → Investigating → Resolved

D. Integration with Other Modules

Module	Purpose of Integration
Inventory	QC on incoming and outgoing shipments
Manufacturing	In-line or final product inspections
Repairs	Quality checks before/after repairs
Maintenance	Trigger actions based on QC issues
PLM (Enterprise)	Link alerts to Engineering Change Orders (ECOs)

3. Configuration & Control Types

- Types of Checks:
 - o Text
 - o Numerical (with tolerance)
 - o Pass/Fail
 - o Multiple choice
 - Control Frequency:
 - o All products
 - o Random inspections
 - o Periodic (batch/lot-based)
 - Define quality teams, roles, and access rights
-

4. Reporting & Dashboards

Report Type	Insights Provided
Quality Check Analysis	Per product, team, or control point
Alert History & Trends	By type, severity, root cause
Vendor/Production Quality	Incoming and in-process metrics
Defect Rates & FPY	First-pass yield, defect performance KPIs

5. Smart Features

- Lot/serial number tracking of inspected items
 - Barcode support for faster scanning
 - Attach photos or documents to alerts and checks
 - Maintain an audit trail of all inspections
 - Email notifications for quality alerts
-

6. Typical Use Cases

- Manufacturing QC: Dimensions, assembly, packaging checks
 - Vendor Management: Rejecting low-quality inbound goods
 - Customer Service: Handling returned goods and complaints
 - Regulatory Compliance: Maintaining inspection and audit logs
 - Process Improvement: Analyzing failures and driving corrections
-

Example Workflows

Incoming Inspection Workflow:

Purchase Receipt → Trigger Incoming QC → Perform Check → Accept/Reject → Raise Quality Alert (if needed) → Investigate & Resolve → Vendor Feedback

In-Process QC Workflow:

Production Step → In-Process QC → Check Failure → Raise Alert → Reject/Repair → Resume Work Order

Benefits

- Consistent product quality and regulatory compliance
 - Early issue detection and resolution
 - Full traceability for audits and certifications
 - Actionable insights for continuous improvement
-

7. Extension Capabilities

- Add quality plans per customer or project
 - Integrate with PLM for Engineering Change Management
 - Link with Maintenance for corrective action on machines
 - Customize workflows and checklists using SugrivaX Studio
-

12. Maintenance Module Features

SugrivaX ERP Maintenance Module: Features

1. Purpose

The Maintenance module in **SugrivaX ERP** enables businesses to manage equipment upkeep, reduce unplanned downtime, and extend the lifespan of assets through both Preventive and Corrective maintenance scheduling. Ideal for manufacturing and asset-intensive industries.

2. Key Features

A. Maintenance Requests

- Generate maintenance requests manually or automatically
- Categorize as:
 - o Corrective (unexpected repair)
 - o Preventive (scheduled service)
- Assign tasks to maintenance teams or individuals
- Track status: New → In Progress → Done → Cancelled

B. Preventive Maintenance Scheduling

- Schedule based on:
 - o Time intervals (e.g., every X days)
 - o Usage metrics (e.g., every 100 hours/cycles)
- Auto-generate maintenance requests based on schedule
- Reduce breakdown risks and improve reliability

C. Equipment Management

- Register equipment/machines/tools with:
 - o Serial number, model, vendor, location
 - o Assigned person/team
 - o Maintenance calendar and type
- Link equipment to Work Centers in the Manufacturing module

D. Maintenance Teams

- Create and manage maintenance teams
 - Define skill sets or expertise (mechanical, electrical, IT, etc.)
 - Monitor workloads and completion metrics
-

3. Integration with Other Modules

Module	Integration Purpose
Manufacturing	Pause production during maintenance

Module	Integration Purpose
Inventory	Link spare parts and track consumption
Quality	Trigger maintenance from QC alerts
PLM (Enterprise)	Associate change orders with equipment updates
Projects/Timesheets	Log time spent on maintenance activities

4. Reporting & KPIs

Report Type	Insights Provided
Equipment Maintenance History	Full lifecycle history and reliability
Maintenance KPIs	MTBF (Mean Time Between Failures), MTTR
Team Performance	Task volume, delays, backlogs
Cost Reports	Costs by equipment, task, or spare parts

5. Smart Functionalities

- Kanban dashboard for task tracking
 - Calendar and Gantt views for scheduling
 - Attach service manuals, photos, reports
 - Barcode/QR scanning for equipment
 - Auto-trigger maintenance after X production cycles
-

Preventive Maintenance Workflow

Create Maintenance Calendar → Define Equipment & Triggers → Auto-Generate Requests → Assign Technician → Complete Task → Log Time & Parts Used

Corrective Maintenance Workflow

Machine Breakdown → Operator Logs Issue → Create Request → Assign → Execute Repair → Resume Operations

Typical Use Cases

- Manufacturing: CNC machines, conveyors, injection molding
 - Construction: Cranes, bulldozers, gensets
 - IT Infrastructure: Servers, UPS, routers
 - Healthcare: Diagnostic machines, OT equipment
 - Fleet: Vehicle servicing and part tracking
-

Benefits

- Minimize downtime, improve operational continuity
 - Optimized allocation of maintenance resources
 - Historical tracking for audit and decision-making
 - Ensures compliance with safety regulations
 - Enables cost control via preventive measures
-

Enterprise-Only Features

- IoT Integration for real-time condition monitoring
- Advanced analytics on maintenance efficiency
- PLM linkage for Engineering Change Orders

13. HRMS Core Module Features

SugrivaX ERP HRMS Core Module: Features

1. Purpose

The HRMS (Human Resource Management System) Core module in **SugrivaX ERP** provides a centralized and structured system to manage employee records, departments, contracts, and organizational hierarchy. It acts as the foundation for extended HR functions such as payroll, attendance, leaves, recruitment, appraisal, and expense management.

2. Key Features

A. Employee Directory

- Maintain detailed employee profiles, including:
 - o Personal information (photo, address, contact details)
 - o Job details (department, title, manager)
 - o Employment history and resume
 - o Identity documents and certifications
 - o Joining date, tags, and work location
- Control visibility of sensitive information (e.g., HR-only, manager view)

B. Department Management

- Define and manage departments and sub-departments
- Assign department heads or managers
- Track headcount and department performance
- Visualize department structure

C. Job Positions & Contracts

- Create job positions with defined:
 - o Salary structure
 - o Reporting lines

- o Recruitment needs
- Manage employee contracts:
 - o Wage type (fixed, hourly)
 - o Contract period (start and end dates)
 - o Work schedule and labor policies
 - o Link with payroll (if enabled)

D. Access Rights & Security

- Define and assign user roles:
 - o Employee
 - o Department Manager
 - o HR Officer
 - Apply role-based access controls to protect sensitive data
 - Integrate with LDAP and Single Sign-On (SSO) systems (optional)
-

3. Integration with Other Modules

Module	Integration Purpose
Attendance	Track employee check-ins and working hours
Leave	Manage leave balances, holidays, and approvals
Payroll	Calculate salaries and deductions based on contracts
Recruitment	Convert hired applicants to employees
Appraisal	Link performance reviews to employee profiles
Expenses	Submit and track employee reimbursements
Fleet	Assign and manage company vehicles for employees
Documents	Store and manage employment-related documents

4. Dashboards & Reporting

Report Type	Key Insights
Employee Statistics	Employee count, demographics, distribution
Contract Expiry	Expiring contracts and renewal alerts
Department Analysis	Size, attrition, and department trends
Job Position Status	Open vs. filled roles
Tenure Report	Employee service duration metrics

5. Smart Features

- Visual organizational chart of employees and departments
- Job position tracking with dynamic updates

- Digital document storage (e.g., resumes, NDAs, ID proofs)
 - Multiple views: List, Kanban, Gantt, and Calendar
 - Tag-based filtering (e.g., by skill, location, language)
-

6. Typical Use Cases

- Startups onboarding initial employees and defining job roles
 - SMEs managing HR operations with minimal overhead
 - Enterprises integrating HRMS across multiple branches or regions
 - Central HR teams managing records for a group of companies
-

7. Security & Compliance

- Enforce role-based data access and editing rights
 - Maintain audit logs of changes (Enterprise version)
 - GDPR-compliant architecture for handling personal information
 - Configure alerts for document expiry (e.g., visa, certification, contract)
-

8. Benefits

- Centralized management of all employee data
 - Smooth integration with broader HR workflows
 - Clear reporting lines and organization-wide visibility
 - Paperless and secure HR record-keeping
 - Scalable to support large and complex organizational structures
-

Enterprise Enhancements (Optional)

- Customization via SugrivaX Studio for forms, fields, and workflows
- Multi-level approval flows using the Approvals App
- Automated generation of offer letters, contracts, and onboarding packs

14. Recruitment Module Features

SugrivaX ERP Recruitment Module is a powerful end-to-end solution that streamlines hiring—from job posting to onboarding—enabling efficient candidate management and collaborative decision-making.

1. Purpose

The Recruitment module is designed to manage the entire hiring lifecycle efficiently. It enables HR teams to create job openings, track applications, coordinate evaluations, and convert successful applicants into employees, all within a centralized and collaborative platform.

2. Key Features

A. Job Positions Management

- Create and manage open positions across departments
- Assign attributes such as:
 - Job location
 - Department
 - Number of expected hires
 - Responsible recruiter
- Customize application forms via SugrivaX Studio (Enterprise version)

B. Application Tracking (ATS)

- Manage candidates through customizable pipeline stages such as:
 - New → Screening → Interview → Offer → Hired
- Use Kanban interface for drag-and-drop progression
- Tag candidates (e.g., “Referral”, “Urgent”, “MBA”) for filtering and reporting

C. Resume and Document Management

- Upload and store resumes, cover letters, and certificates
- Auto-capture applications from connected recruitment mailboxes
- Link applicant records to corresponding job positions

D. Multi-Team Collaboration

- Schedule interviews and assign interviewers
- Collect feedback using standardized evaluation forms
- Internal comments and discussion logs per candidate
- Customize evaluation criteria for each job role (Enterprise feature)

3. Integration with Other Modules

Module	Integration Purpose
Employees	Convert successful candidates to active employees
Website	Display job listings on the company careers page
Documents	Attach resumes, certificates, and offer letters

Module	Integration Purpose
Surveys	Pre-screen candidates using structured questionnaires
Calendar	Schedule interviews and sync with team calendars
Referrals (Ent.)	Manage and reward internal referrals

4. Reporting & Dashboards

Report Type	Example Insights
Pipeline Performance	Candidate drop-off rates by stage
Time-to-Hire	Average days from application to offer
Source Analysis	Effectiveness of job boards or channels
Fulfillment Rate	Filled vs. unfilled positions by department
Interview Feedback	Aggregate ratings and outcomes per stage

5. Smart Features

- Automated email templates for each stage of hiring (e.g., acknowledgment, rejection, offer letter)
 - Resume de-duplication and candidate history tracking
 - Role-based filters and grouping options
 - Multi-step approvals for job requisitions via Approvals module
 - End-to-end candidate communication history for audit and collaboration
-

6. Sample Workflow

Create Job Position → Publish on Website → Receive Applications → Screen and Shortlist → Schedule Interviews → Collect Feedback → Make Offer → Hire → Convert to Employee Record

7. Job Posting & Sourcing

- Post vacancies on:
 - Internal company website
 - Email campaigns
 - Third-party job boards (via integration)
 - Provide self-service candidate portals for job application submissions
-

8. Access & Security

- Restrict access based on user roles (e.g., Recruiter, Interviewer, Manager)
- Track user activity on candidate records

- Ensure GDPR-compliant data handling and deletion protocols

9. Benefits

- Centralized platform for recruitment operations
- Improved collaboration between HR, hiring managers, and interviewers
- Reduced time-to-hire with streamlined processes
- Enhanced candidate experience with consistent communication
- Scalable solution for multi-location or high-volume recruitment

Enterprise-Only Additions

- Referral Management: Track, reward, and manage employee referrals
- Skill Assessment Surveys: Integrate pre-screening quizzes or tests
- Salary Configuration: Link recruitment outcomes to payroll setup
- Approval Workflows: Define multi-level requisition approvals

15. Attendance Module Features

The **Attendance Module** in SugrivaX ERP enables businesses to accurately track employee check-ins, working hours, and shift schedules, ensuring transparency, compliance, and productivity across the organization.

1. Purpose

The Attendance module is designed to manage employee presence, calculate working hours, and integrate with related HR processes such as payroll, leaves, and shift management. It ensures real-time visibility of workforce availability and supports automation for accurate record-keeping.

2. Core Features

A. Employee Check-In / Check-Out

- Employees can mark attendance via:
 - Web portal
 - Mobile app
 - Shared Kiosk (tablet or desktop)
 - Biometric device or RFID (if integrated)
- Every entry is timestamped automatically

B. Automatic Attendance Calculation

- Calculates total worked hours per day or custom periods
- Supports overtime tracking
- Integrates with Payroll for automated salary computation

C. Real-Time Attendance Dashboard

- HR/Admins can view:
 - Who is currently checked in
 - Late arrivals or early departures
 - Total working hours and absenteeism

D. Kiosk Mode for Shared Devices

- Enables centralized check-in via PINs, QR codes, or barcodes
- Ideal for manufacturing plants, retail stores, or warehouses

E. Biometric and RFID Integration

- Compatible with biometric fingerprint scanners and RFID readers
- Enables automatic presence tracking and reduces manual errors

F. Shift and Schedule Management

- Manage basic shift assignments
- For advanced planning, integrates with the **Planning** module
- Define different work schedules by role or location

3. Reporting & Analytics

Report Type	Insights Provided
Daily/Weekly Attendance	Presence trends, work hour summaries
Late Entry Report	List of delayed check-ins per employee
Early Exit Report	Logs of early check-outs
Absenteeism Trends	Track no-shows or unplanned absences
Department Summary	Attendance metrics by team or unit

Reports can be exported to Excel or PDF formats for audits or internal analysis.

4. Automation & Alerts

- Flags inconsistencies such as missed check-outs
- Sends notifications to HR/Admins for irregular patterns

- Supports custom rules for auto-validation or warnings

5. Integration with Other Modules

Module

Integration Purpose

Employee Automatically links attendance to employee records

Leaves Excludes approved time-off from absenteeism data

Payroll Uses actual worked hours for salary calculations

Planning Supports advanced shift scheduling (optional)

6. Extensibility

- Custom workflows and fields can be added using **SugrivaX Studio**
 - Open APIs allow integration with external access control systems or third-party biometric devices
-

7. Mobile Accessibility

- Mobile app allows employees to check-in/out on the go
 - GPS-based logging optional (for field or remote teams)
-

8. Benefits

- Accurate and automated attendance tracking
 - Improves workforce discipline and visibility
 - Reduces manual administrative work
 - Ensures compliance with labor laws and audit readiness
 - Helps in identifying productivity gaps or shift inefficiencies
-

Common Use Cases

- On-site teams needing centralized check-ins
- Field staff requiring mobile attendance
- Organizations with rotating shifts and multiple branches
- Enterprises needing biometric or RFID integration

16. Expense Module Features

The **Expense Module** in **SugrivaX ERP** is designed to streamline employee expense submission, approval, reimbursement, and accounting—enhancing visibility, compliance, and efficiency across organizations of all sizes.

1. Purpose

This module simplifies the process of managing employee-incurred business expenses such as travel, meals, lodging, and office purchases. It ensures quick reimbursements, policy compliance, and seamless integration with finance.

2. Core Features

A. Expense Submission

- Employees can submit expenses manually or by uploading receipts
- Supports mobile uploads via SugrivaX Mobile App
- Categorization of expenses (e.g., travel, meals, fuel, stationery)
- Multi-currency support for international claims

B. Receipt Management

- Attach scanned copies or photos of receipts
- OCR (Optical Character Recognition) support (Enterprise)
- Auto-extraction of details like date, vendor, and amount

C. Approval Workflow

- Multi-level approval chains (e.g., Employee → Manager → Finance)
- Email and in-app alerts for approvers
- Configurable approval rules and thresholds based on amount or category

D. Expense Policy Compliance

- Define per diem rates and category-wise limits
- Block or warn for out-of-policy claims
- Automated alerts for policy violations

E. Accounting Integration

- Approved expenses posted automatically as journal entries
- Tax handling (e.g., VAT/GST inclusive or exclusive)
- Employee reimbursements via vendor bills or payroll

3. Reporting & Analytics

Report Type	Insights Provided
Expense Breakdown	By category, department, or employee

Report Type	Insights Provided
Reimbursement Status	Paid vs. unpaid claims
Policy Violation Logs	Track rejected or blocked claims
Team/Project Expenses	Cost tracking against project codes or budgets

- Exportable in PDF/Excel
- Filterable by time period, expense status, or cost center

4. Mobile-Friendly Features

- Submit and track expenses via mobile
- Snap-and-upload receipt images
- Real-time status updates on approvals and reimbursements

5. Integration with Other Modules

Module	Integration Purpose
Accounting	Posts approved expenses, triggers vendor/employee payments
Payroll	Option to reimburse employees via payslips (Enterprise)
Projects	Tag expenses to project tasks for cost analysis
CRM/Sales	Track client-related expenses for profitability insights
Employees	Links all expenses to employee records

6. Automation & Smart Features

- OCR smart scanning (Enterprise)
- Auto-fill from previous expense templates
- Duplicates detection to prevent double claims
- Reimbursement reminders and audit trail logging

7. Benefits

- Accelerated reimbursement cycles
 - Enhanced visibility over employee and departmental spending
 - Enforced policy compliance to reduce fraud and over-claiming
 - Clear audit trails for financial accountability
 - Better forecasting and budgeting with real-time data
-

8. Typical Workflow

1. **Employee** logs an expense and uploads a receipt
2. **Manager** reviews and approves
3. **Finance** validates and posts entries
4. **Reimbursement** is processed via payment run or payroll

9. Common Use Cases

- Sales teams traveling for client meetings
- Project-based organizations tracking billable expenses
- Field service teams needing mobile expense capture
- SMEs automating their reimbursement process

17. Employee Module Features

The **Employee Module** in **SugrivaX ERP** serves as the central hub for managing employee information across the organization. It enables streamlined HR processes, seamless integration with other HR and operational modules, and a single source of truth for employee records.

1. Purpose

The Employee module is designed to maintain comprehensive, up-to-date records of all employees. It supports organizational hierarchy, contracts, documents, job roles, and facilitates integration with HRMS functionalities like payroll, attendance, leaves, and appraisals.

2. Core Features

A. Employee Profiles

- Store personal and work details:
 - Name, gender, photo, DOB, contact info
 - Job title, department, manager, company branch
 - Employment type (full-time, part-time, contractual)
 - Joining date, ID numbers, nationality, language

B. Document Management

- Attach documents such as:
 - Offer letters, contracts, resumes, ID proofs
 - Appraisal letters, certifications
- Expiry tracking for documents (e.g., visas, contracts)

- Encrypted storage with access control

C. Organization Structure

- Define departments and assign employees
- Create job positions with reporting lines
- Visualize reporting hierarchy and org charts
- Multi-company, multi-location support

D. Smart Dashboards & Buttons

- View related records in one click:
 - Leaves, Attendances, Timesheets, Contracts, Expenses
- Graph and list views for HR/Admin overview

3. Integration with Other Modules

Module	Purpose of Integration
Recruitment	Converts hired candidates to employees
Leaves	Links time-off requests to employee profiles
Attendance	Tracks check-in/out, working hours
Expenses	Maps expenses to employees
Payroll	Generates payslips based on employee contracts (Enterprise)
Appraisal	Connects performance reviews to employees
Fleet	Assigns company vehicles to employees

4. Reporting & Analytics

Report Type	Insights Provided
Employee Directory	List by department, designation, location
Headcount Analytics	Active vs. inactive, joiners vs. leavers
Attrition Reports	Employee exits by reason/time period
Contract Expiry	Upcoming renewals or terminations

- Export options in Excel or PDF
- Search, filter, and group employees dynamically

5. Access Rights & Security

- Role-based access (Employee, Manager, HR Officer)
- Restrict sensitive fields (e.g., salary, ID, contracts)
- Full audit log of changes (Enterprise)
- GDPR-compliant employee data handling

6. Customization & Extensibility

- Add custom fields (e.g., skills, certifications)
- Modify views and forms with **SugrivaX Studio**
- Build workflows for onboarding, transfers, and offboarding
- Extend with modules like:
 - **Employee Documents Expiry Tracker**
 - **Employee Skill Matrix**
 - **Multi-Company Employee Management**

7. Benefits

- Centralized and organized employee data
- Real-time insights for decision-making
- Smooth integration with all HR and business processes
- Supports compliance and secure storage
- Scales with organizational growth

8. Typical Use Cases

- HR teams managing multi-location or multi-company records
- Organizations needing a unified employee view
- Startups formalizing HR processes
- Enterprises integrating payroll, attendance, and performance

18. HR Dashboard Module Features

The **HR Dashboard** module in **SugrivaX ERP** acts as a centralized control center for HR managers and executives. It aggregates HR data from multiple modules into real-time visualizations, aiding in strategic decision-making and workforce management.

1. Purpose

The HR Dashboard provides an intuitive interface to monitor and analyze key HR KPIs, such as employee count, attendance, turnover, leave trends, expenses, and recruitment performance — all from a single screen.

2. Key Components

A. Employee Overview

- Total active employees
- New hires this month
- Resignations/terminations
- Department-wise headcount
- Gender and age distribution

B. Attendance Insights

- Real-time check-in/check-out data
- Late arrivals, early exits
- Average working hours by employee/team
- Absenteeism trends over time

C. Leave Management Dashboard

- Pending, approved, and rejected leave requests
- Upcoming planned leaves
- Leave balance summaries by employee or team
- Peak absence periods for resource planning

D. Recruitment Metrics

- Open job positions by department
- Applications received, shortlisted, rejected
- Time-to-hire and offer acceptance rate
- Interview feedback status

E. Expense Summary

- Total expenses submitted and reimbursed
- Category-wise (travel, meals, etc.) breakdown
- Pending reimbursements
- Top spenders and projects incurring high costs

F. Appraisal Summary

- Completed vs pending evaluations
- Performance rating distribution
- Upcoming review dates
- Appraisal feedback and suggestions

3. Customization Options

- Build dashboards using:
 - **SugrivaX Studio (low-code/no-code)**

- Pivot tables, spreadsheet-style analytics
 - Custom charts (bar, pie, line, KPI cards)
- Drill-down views to jump from chart to detailed records
- Configure role-specific dashboards (HR, CEO, Team Manager)

4. Integration with Other Modules

Module	Integration Purpose
Employees	Base data for employee metrics
Attendance	Daily workforce availability tracking
Leaves	Leave requests, trends, and approvals
Recruitment	Real-time hiring pipeline analysis
Expenses	HR-related financial data
Appraisal	Performance tracking and evaluation timelines
Payroll (Ent.)	Monthly payroll summaries (optional)

5. Smart Features

- Live refresh and auto-updating metrics
 - Configurable alerts (e.g., high absenteeism, overdue appraisals)
 - Export dashboards to PDF, Excel, or PNG
 - Responsive design for tablet/mobile access
 - Role-based filters and views
-

6. Benefits

- Data-driven HR operations
 - Instant insights for faster decision-making
 - Early detection of issues like attrition, absenteeism, or hiring bottlenecks
 - Reduces manual reporting burden
 - Supports strategic HR planning and boardroom reporting
-

7. Popular Add-ons and Templates

- **SugrivaX Pre-built HR Dashboard Pack** (KPI cards, graphs, tables)
 - Third-party dashboards:
 - **Cybrosys HR Dashboard**
 - **Ksolves HR Metrics Pack**
 - **Mates HRMS Dashboard**
 - Visual styles: Dark mode, Modern card layout, Grid-style analytics
-

8. Best Use Cases

- HR Managers tracking real-time KPIs across locations
- Business Owners needing HR health at a glance
- Talent teams measuring recruitment efficiency
- CFO/CHRO syncing HR costs with financial planning

19. Time Off Module Features

Manage all leave requests, policies, and approvals with clarity and control.

Purpose

The **Time Off module** (formerly "Leaves") in **SugrivaX ERP** allows organizations to efficiently manage employee leaves, including submission, approval, tracking, and compliance, ensuring workforce availability and transparency.

Key Features

1. **Leave Request Management**

- Employees can submit leave requests directly from their dashboard.
- Managers and HR are notified of pending approvals.
- Requests include dates, leave type, and optional notes or attachments (e.g., medical certificate).

2. **Leave Types & Allocations**

- Define custom leave types: Paid leave, sick leave, comp off, unpaid leave, work from home, etc.
- Assign leave balances per employee or department.
- Supports carry-forward and accrual policies (monthly or yearly).

3. **Approval Workflow**

- Multi-level approval structure (e.g., Manager → HR).
- Auto-approve certain types if configured.
- Rejection includes feedback and comments.

4. **Calendar & Gantt Views**

- Visual features of team availability through calendar and Gantt views.
- Helps managers with resource planning and avoids staffing conflicts.

5. **Automatic Attendance Sync**

- Approved time off entries are synced with the **Attendance module** to avoid false absenteeism flags.

6. **Public Holidays & Work Schedule Integration**

- Integrates with company calendar to exclude weekends and public holidays from leave days.
 - Compatible with customized work schedules (part-time, shifts, etc.).
-

Reporting & Dashboard

- Time off summary by employee, department, or leave type.
- Leave history and balances available to employees and HR.
- Export reports in Excel or PDF.

Integrations

Module	Integration Purpose
Employee	Maps leave records to specific employees
Attendance	Reflects approved leaves in working hours calculations
Payroll	Auto-adjusts salaries based on unpaid leaves
Planning	Adjusts resource availability
Appraisal	Reflects in employee KPIs, if applicable

Benefits

- Transparent leave process with audit trail
- Better visibility into workforce availability
- Reduces manual tracking and HR workload
- Supports multiple time zones, leave types, and company policies

Best Use Cases

- SMEs and large enterprises with multi-level teams and varying leave policies
- Remote and distributed teams where calendar-based visibility is critical
- Companies with compliance or HR policy enforcement needs

Customization Options

- Add custom fields (e.g., reason, backup person) via **SugrivaX ERP Studio**
- Configure alerts, mail templates, or escalations
- Extend with approval hierarchy rules, accrual calculations, or HR analytics dashboards

20. Branch Transfer Features

Support employee relocation across branches, companies, or departments smoothly and compliantly.

Purpose

The **Branch Transfer** feature allows internal workforce mobility across **branches, locations**, or even **companies**—helpful during expansion, internal restructuring, or employee relocation.

Key Elements of Branch Transfer

1. **Employee Master Data Update**

Update the following in the employee profile:

- Department
- Job Position
- Company (if multi-company setup)
- Work Location & Address

2. **Branches as Structures**

Based on configuration:

- Branches may be internal locations, separate companies, or different departments.

How to Perform a Transfer

Manual Transfer

Steps:

1. Go to **Employees** → **Employees**
2. Open the employee's record
3. Update:
 - Company (if inter-company)
 - Department / Work Location / Job Title
4. Save

Integration Points

Module	Impact
Payroll	Salary rules/contracts may vary—must be updated
Attendance	Update attendance tracking devices and shifts
Projects	Reassign project tasks if linked to branches
Time Off	Leave balances and policies may differ
Contracts	New employment contract may be required

User Access Rights

- Access must be updated based on company and location
- HR/Admin must ensure permissions reflect new assignment

Benefits

- Streamlined workforce reallocation
- Documentation and tracking for audit (if customized)
- Efficient planning across departments or branches
- Supports scalable organizational structure

Considerations

- **Multi-company Transfers:** Configure access correctly (users don't access multiple companies unless allowed)
- **Payroll/Compliance:** Local rules may vary per region or branch
- **Transfer History:** Not logged by default—requires a custom solution

Best Practices

- Set up a formal branch transfer policy
- Use approval workflows for visibility and control
- Automate user access updates via **SugrivaX ERP Studio** or technical support
- Maintain change logs for audits

21. Employee Self-Service (ESS) – Features

Objective

The **Employee Self-Service (ESS)** portal in **SugrivaX ERP** empowers employees to independently manage their HR-related tasks. It improves transparency, reduces administrative burden, and supports a paperless environment by allowing:

- Viewing and updating personal information
- Applying for leaves, expenses, and appraisals
- Accessing company documents
- Logging attendance and timesheets
- Tracking the status of various requests

Key Features of ESS in SugrivaX ERP

1. Personal Information Management

- Employees can view or update:
 - Contact info and residential address
 - Bank account details
 - Emergency contact
 - National ID/passport numbers

- Changes may trigger HR approval workflows (configurable)
-

2. Time Off Requests

- View real-time leave balances by category (e.g., PTO, sick leave)
 - Submit leave requests with start/end dates and reason
 - Track approval status (Submitted → Approved/Rejected)
 - View team and individual leave plans via the integrated calendar
-

3. Attendance and Timesheets

- Clock in/out from the portal (if attendance tracking is enabled)
 - Submit daily or weekly timesheets for project-based work
 - Workflow validation supported (Manager → HR)
-

4. Expense Management

- Submit expenses with:
 - Categories (travel, meals, etc.)
 - Receipt uploads and descriptions
 - Justifications for review
 - Track approval and reimbursement status
 - Link to project/task for internal or client billing
-

5. Appraisals and Goals

- Participate in self-assessment and manager reviews
 - Set and track individual goals
 - Monitor performance history and appraisal cycle stages
 - KPIs integration available in Enterprise version
-

6. Document Access

- Download HR documents such as:
 - Offer letters
 - Salary slips (linked to Payroll module)
 - Company policies
 - Upload personal files (e.g., PAN, Aadhaar, medical records)
-

7. Request Approvals

- Employees can raise requests for:
 - Department or branch transfers
 - Remote work or hybrid arrangements
- Managers/HR are notified and can approve/decline

8. Integrated Calendar View

- View of public holidays, approved leaves, and internal events
- Useful for individual and team-level planning

9. Access Control & Security

- Employees have access only to their own data
- Managers can view and manage their team's information
- HR/Admin roles enjoy full data access
- Strict role-based permissions ensure confidentiality and security

Benefits of ESS in SugrivaX ERP

Benefit	Description
Employee Empowerment	Self-service reduces HR queries and increases autonomy
Efficiency	Automates daily HR tasks
Transparency	Employees can track the status of all requests
Centralization	All employee data and documents in one place
Security	Role-based access to protect sensitive information

Integration with Other Modules

Module	Integration Purpose
Payroll	Time-off and attendance data feed payroll automatically
Recruitment	Onboarding flows into employee record
Documents	Secure access to HR and personal files
Project	Timesheets support internal billing or costing

Typical Use Cases

- Mid-size businesses looking to reduce HR overhead
- Remote and hybrid teams needing real-time HR access
- Service companies with timesheet-linked payroll or billing

22. Employee Contracts Module – Features

Purpose

The **Employee Contracts** module in **SugrivaX ERP** defines, manages, and tracks contractual agreements between employees and the organization. It is foundational for HR operations such as **payroll processing, attendance tracking, leave entitlements, and compliance with employment regulations**.

Key Components of a Contract

Accessible via: **Employees → Contracts**

1. Basic Information

- Employee Name (linked to the employee record)
 - Job Title and Department
 - Reporting Manager
 - Contract Reference ID (unique)
-

2. Contract Dates

- Start Date of employment
 - End Date (if applicable)
 - Trial Period End Date (optional, for probation setups)
-

3. Employment Details

- Contract Type: Full-time, Part-time, Intern, Consultant
 - Working Schedule (used for attendance and overtime calculations)
 - Wage Type: Monthly, Hourly, Annual
 - Salary Amount and Currency
 - Salary Structure Type: Defines rules for compensation (used by Payroll)
-

4. Salary and Compensation

- Integrated with SugrivaX ERP's Payroll module
- Supports:

- Basic pay
 - Allowances (HRA, travel, etc.)
 - Deductions (PF, loans, taxes)
- Manage variable pay, bonuses, and salary advances

5. Working Hours & Leaves

- Tied to predefined work schedules
- Determines overtime calculations and attendance evaluations
- Links to leave policies: public holidays, weekend rules, entitlements

6. Status Tracking

Contract records can be in the following states:

- **New** – Created but not yet activated
- **Running** – Active and linked to payroll
- **Expired** – Past contract end date
- **Closed** – Manually terminated with reason
- **Cancelled** – Withdrawn before activation

Contract Lifecycle in SugrivaX ERP

Stage	Description
Draft	Contract created by HR but not yet confirmed
Confirm	Activated and linked to Payroll and Attendance
Modify	Editable to accommodate salary or role changes
Renew	Duplicate and extend with new terms
Terminate	Close with exit date and reason

Integration with Other Modules

Module	Integration Purpose
Payroll	Pulls wage structure for payslip generation
Attendance	Working hours and shift calculations
Time Off	Leave entitlements linked to contract terms
Recruitment	Contracts auto-created post-hiring
Documents	Store signed contracts and offer letters
Appraisal	Eligibility linked to active contracts

Benefits

Feature	Advantage
Centralized Management	One location for all contract records
Legal & Policy Compliance	Ensures standardized HR practices
Payroll Automation	Automates salary computation
Easy Renewals & Edits	Fast updates during role/salary changes
Secure Access	Controlled by role-based permissions

Key Considerations

- **Localization:** SugrivaX ERP can be extended for country-specific compliance such as **PF, ESI, TDS, or wage rules**
 - **Digital Signing:** Contracts can be signed electronically (using SugrivaX ERP Sign or third-party integrations)
 - **Multi-Country Support:** Set up different salary structures for global operations
-

Best Practices

- Use pre-configured templates for recurring job roles
- Define and track probation periods with automatic reminders
- Maintain detailed **change logs** (using internal chatter or notes)
- Store contract documents securely under the employee's profile

23. Skill Management Module – Features

Purpose

The **Skill Management** module in **SugrivaX ERP** helps organizations **track, evaluate, and develop employee skills** across departments. It ensures the right people are assigned to the right tasks or roles, improving workforce agility and long-term planning.

Core Features

1. Skill Types & Definitions

- Create **Skill Types** such as Programming, Languages, Tools, Soft Skills
 - Under each type, define **specific skills** (e.g., Java, English, Excel)
 - Set **Proficiency Levels** (e.g., Beginner → Expert or numeric levels)
 - Assign **Skill Tags** for easy search and categorization
-

2. Employee Skill Profiles

- Each employee's profile can include:
 - Skill Name
 - Current Level
 - Desired Level (for development goals)
 - Progress (%)
 - Skills can be updated by HR, managers, or via **self-assessment**
-

3. Skill Gap Analysis

- Compare current vs. required skills for a **job role or project**
 - Dashboards visualize team or individual skill gaps
 - Enables targeted **training, mentoring, or hiring decisions**
-

4. Job Roles & Skill Requirements

- Define mandatory skills for specific job positions
 - Auto-match candidates to open roles during recruitment
 - Helps in **succession planning** and internal job movements
-

5. Evaluation & Feedback

- Skill ratings can be updated during performance appraisals
 - Supports **peer or manager evaluations** (via Appraisal Module)
 - Continuous improvement tracking through employee feedback
-

6. Integration with Other Modules

Module	Functionality
Employees	Skill data stored in employee records
Appraisal	Use skills during performance evaluations
eLearning	Recommend or assign courses based on skill gaps
Projects	Assign tasks to employees based on required skills

Key Benefits

Benefit	Description
Talent Mapping	Identify who has what skills across the company
Reduced Hiring Costs	Upskill internal talent rather than hire externally
Personalized Development	Set development goals and track progress
Continuous Learning	Integrates with SugrivaX ERP eLearning module

Benefit	Description
Succession Planning	Prepare employees for future roles

User Interface Experience

- Modern **List and Kanban views**
- **Color-coded skill levels** for quick analysis
- Filters by employee, department, or skill type
- Graphs and dashboards for **skill distribution reports**

Customization Suggestions

- Auto-assign training modules when skill gaps are detected
- Link skills to certifications for **regulatory or safety compliance**
- Extend with custom reporting for department-wise or location-based skill matrices
- Add alerts or review cycles for **skill expiry or refresh requirements**

Final Thoughts

The **Skill Management** module in SugrivaX ERP is a **lightweight yet powerful tool** that brings clarity to talent management and workforce planning. When combined with **Appraisal, eLearning, and Projects** modules, it supports a complete ecosystem for **performance, learning, and growth**.

24. HR Payroll Module – Features

Purpose

The **HR Payroll** module in **SugrivaX ERP** helps HR and finance teams manage **employee compensation** efficiently — including salary structures, benefits, deductions, payslips, and full accounting integration. It automates complex calculations and ensures legal compliance across different regions.

Core Components

1. Payroll Structures

- Define multiple **salary structures** for different employee types (e.g., Intern, Full-time, Executive)
- Each structure includes rules for:
 - Basic Pay
 - House Rent Allowance (HRA)

- Provident Fund (PF) / Employee State Insurance (ESI)
 - Professional Tax
 - Income Tax (TDS)
 - Custom deductions (Loans, Advances, etc.)
 - Modular setup — structures can inherit from parent templates
-

2. Salary Rules

- Rule-based engine with:
 - Conditions (fixed or formula-based using Python expressions)
 - Calculation logic
 - Taxable/non-taxable categorization
 - Sequence ordering and contribution tracking
 - Fully **localizable** by country (India, UAE, US, etc.)
-

3. Payslip Generation

- Auto-generate or manually create monthly payslips
 - Pulls data from:
 - Salary structure
 - Attendance
 - Approved leave records
 - Contract working days
 - Batch processing supported for departments or entire company
 - Payslip Status: Draft → Verified → Paid
-

4. Payroll Batches

- Group payslips by:
 - Department
 - Role
 - Location or cost center
 - Automate journal entry creation in the accounting module
-

5. Contracts & Work Entries

- Contract fields define:
 - Wage Type (Hourly, Monthly, Annual)
 - Work Schedule
 - Salary Structure
 - Contract Duration
- Work Entries auto-generated from:

- Attendance
 - Time Off
 - Overtime
 - Public Holidays
 - All entries linked to contract for accurate salary computation
-

6. Accounting Integration

- Auto-generates journal entries for:
 - Salaries
 - Taxes
 - Benefits and deductions
 - Map to company's **Chart of Accounts**
 - Supports direct salary payment files (SEPA, NEFT, etc.)
 - Enables automated reconciliation and payroll audit
-

7. Localization & Compliance

- Includes regional rules for:
 - Income Tax (TDS slabs)
 - Provident Fund / ESI limits
 - Gratuity eligibility
 - Supports custom country-wise compliance via localization modules
-

8. Employee Self-Service

- Employees can:
 - View/download payslips
 - Check salary components
 - Review contract details
 - Submit queries or correction requests
-

Reporting & Dashboards

- Payroll summaries per:
 - Employee
 - Department
 - Time period
- Contribution breakdown reports (PF, ESI, Tax)
- Audit trail of salary changes and payments
- Custom Excel/PDF reports for compliance and internal analysis

Integrations

Module	Purpose
Employees	Pulls contracts and salary structure
Attendance	Calculates pay based on presence/absence
Time Off	Adjusts pay based on unpaid or leave days
Accounting	Syncs journal entries and payments
Recruitment	Sets salary proposal during onboarding
Projects/Timesheet	For project-based billing calculations

Advantages

- Full **end-to-end payroll processing**
 - Ready for **compliance with country-specific rules**
 - Integrated with HR and finance workflows
 - Reduces **manual effort and errors**
 - Empowers employees via **transparent payroll access**
-

Customization Suggestions

- Set ESG-linked salary bonuses (e.g., green commute rewards)
 - Automate **salary revision workflows** based on performance data
 - Add alerts for:
 - Contract expiry
 - Tax anomaly
 - Bonus eligibility
 - Create multiple payroll journals for different branches or countries
-

Final Thoughts

The **Payroll module** in SugrivaX ERP is designed for **SMEs and growing enterprises** looking for an integrated and flexible payroll solution. It supports everything from **basic salary processing to compliance automation**, and scales seamlessly across **multi-branch and multi-country operations**.

25. Lunch Module – Features

The **Lunch Module** in **SugrivaX ERP** streamlines the process of managing employee meals, ordering from vendors, and tracking lunch-related expenses within the ERP system.

Core Features

1. Vendor Management

- Register and manage multiple lunch vendors (restaurants, canteens, cafes)
- Define:
 - Menu items (with prices)
 - Categories (e.g., Vegetarian, Drinks, Combos)
 - Delivery time slots
 - Days of operation

2. Menu & Product Setup

- Create and categorize lunch products:
 - Food name, description, image
 - Price (tax-inclusive)
 - Vendor association
- Set availability for specific days or slots

3. Ordering Workflow for Employees

- Employees can:
 - Browse menus, filter by category
 - Place orders via web or mobile
 - Pre-order for week/day
 - View order history
- Payment options:
 - Company-paid (subsidized)
 - Employee-paid (deducted from salary or wallet)

4. Subsidy & Pricing Rules

- Configure:
 - Fixed/percentage subsidies
 - Daily/monthly limits
- Track company vs. employee contributions

5. Wallet Management

- Virtual wallets per employee
- Top-up options available
- Wallet auto-adjusts with each order
- Data used for payroll deductions

6. Order Management & Delivery

- Admin dashboard to:
 - View consolidated vendor orders
 - Track status (delivered/cancelled)
 - Export or print sheets for vendors

7. Reporting & Analytics

- Track:
 - Total lunch spend (company vs. employee)
 - Most ordered meals
 - Vendor performance
 - Cost breakdown by department

Integrations

Module	Integration Benefit
Employees	Link orders and wallets to profiles
Payroll	Deduct meal charges / apply subsidies
Accounting	Book lunch expenses into correct cost centers
Website	Optional menu visibility in employee portal

Benefits

- Streamlines structured food ordering
- Tracks and controls meal expenses
- Offers clear vendor billing
- Insight into food preferences
- Supports sustainability via waste tracking

26. Resignation Module – Features

The **Resignation Module** in **SugrivaX ERP** standardizes the employee exit process, ensuring transparency, operational continuity, and integration with HR and payroll.

Key Features

- 1. Employee Resignation Request**
 - Employees initiate from the portal with:
 - Reason, last working day, comments
 - Attachments (resignation letter, etc.)
 - Real-time approval status tracking
- 2. Multi-Level Approval Workflow**
 - Configurable chain:
 - Manager → HR → Dept Head
 - Approvers can:
 - Accept/Reject/Request info
 - Add internal notes
 - Notifications sent automatically
- 3. Exit Formalities**
 - HR can manage:
 - Exit interview
 - Asset return
 - Knowledge transfer
 - Clearance and forms
- 4. Contract Termination**
 - Auto-updates contract status with:
 - Termination reason and effective date
 - Triggers:
 - Payroll final settlement

- Deactivation of benefits
- 5. **Leave Balance & Final Settlement**
 - Auto-calculates:
 - Leave encashments
 - Deductions for unserved notice period
 - Generates full & final (F&F) report
- 6. **Analytics & Reporting**
 - Track:
 - Exit reasons
 - Departmental attrition
 - Notice compliance
 - Filter by type, grade, location

Integrations

Module	Role in Workflow
Employees	Profile history & updates
Contracts	Auto-terminate on approval
Leaves	Adjust balances, calculate encashments
Payroll	Triggers F&F settlement
Documents	Store clearance, exit forms, relieving letters
Projects	Reallocate tasks during transition

Benefits

- Complete digital resignation workflow
- Secure approval and record traceability
- Integrated with HR and Payroll
- Analyzes attrition trends
- Ensures compliance and policy alignment

27. Fleet Management Module – Features

The **Fleet Module** in **SugrivaX ERP** helps manage company vehicles, from insurance and contracts to fuel and service logs, offering centralized and compliant operations.

Functional Areas

1. **Vehicle Management**
 - Track details like:
 - License, model, brand, chassis, etc.
 - Driver assignment
 - Status (New, Active, Sold, Scrapped)
 - Odometer readings and lifecycle tracking
2. **Driver Assignment**
 - Link drivers (employees) to vehicles

- Track handovers, license expiry, testing
- 3. **Contract Management**
 - Manage:
 - Insurance
 - Lease/Maintenance
 - Set cost, start/end dates, and reminders
- 4. **Odometer Tracking**
 - Logs via manual/mobile entry
 - Analyze usage trends (km/miles)
- 5. **Fuel Log**
 - Record:
 - Quantity, cost, date, vendor
 - Fuel type
 - Monitor mileage and efficiency
- 6. **Maintenance Tracking**
 - Log service activities:
 - Garage, service date, cost, downtime
 - Preventive maintenance scheduling
- 7. **Cost Analysis**
 - Analyze:
 - Fuel, insurance, service costs
 - Per department or vehicle
 - Export or integrate with accounting
- 8. **Reminders & Alerts**
 - Automated alerts:
 - Insurance, service, registration expiry

Integrations

Module	Integration Use Case
Employees	Assign drivers
Documents	Attach registration, insurance, contracts
Accounting	Track and book vehicle-related expenses
Projects	Allocate vehicle to projects (if enabled)
Maintenance	Schedule periodic checks or repairs (optional)

Benefits

- Real-time fleet visibility
- Reduces costs through smart tracking
- Supports preventive maintenance
- Ensures compliance with proper documentation
- Automated reminders improve accountability

28. Projects Module – Features

The **Projects Module** in **SugrivaX ERP** acts as a central hub for project planning, task management, time tracking, team collaboration, and profitability analysis. It's suitable for service-based businesses, consultants, IT companies, engineering teams, and internal departments.

Key Capabilities

1. Project Creation

- Manually create projects or auto-generate from:
 - Sales orders (e.g., service contracts)
 - Templates with predefined stages/tasks
- Define:
 - Customer
 - Start and end dates
 - Project Manager
 - Tags and billing type (non-billable, timesheet-based, fixed price)

2. Task Management

- Visual Kanban boards with customizable stages (To Do, In Progress, Done)
- Task fields:
 - Title, description, priority, deadlines
 - Assignees, collaborators
 - Subtasks, checklists
 - File uploads and activity log (chatter)

3. Time Tracking & Timesheets

- Manual or Timesheet-based logging
- Daily/weekly views
- Use cases:
 - Customer billing
 - Costing and budgeting
 - Performance monitoring (actual vs planned hours)

4. Milestones and Planning

- Define key milestones
- Use Gantt charts to plan timelines and allocate resources
- Integrated calendar and pivot views for tracking

5. Customer Portal Access

- Grant clients limited access to:
 - Project progress
 - Task updates
 - Shared files
 - Timesheets (optional)

6. Collaboration & Communication

- Schedule meetings, calls, and to-dos
- Auto-email task updates to followers
- Threaded task discussions

- Sync with Email, Calendar, Documents

Key Integrations

SugrivaX Module	Integration Purpose
Sales	Auto-create project from Sales Orders
Timesheets	Time logging and billing
Employees	Assign project roles/tasks
Invoicing	Auto-generate bills from timesheets/tasks
Documents	File uploads and versioning
Helpdesk	Convert support tickets into tasks
HR	Resource allocation and availability

Analytics & Reporting

- Billable vs non-billable profitability
- Time usage by task/user/project
- Burn-down charts and progress tracking
- Cost vs revenue (with Accounting)
- Custom dashboards with project KPIs

Project Types You Can Manage

- Client Projects (Billable or Fixed-Fee)
- Internal Initiatives (R&D, Infra, Hiring)
- Retainer & Support (Helpdesk-based)
- Agile/Scrum Projects with sprints
- Product Installations or Custom Implementations

Benefits

- Centralized platform for managing delivery
- Accurate billing and costing with time tracking
- Seamless team collaboration
- Real-time visibility into project health
- Track profitability across projects

Customization Ideas

- Add SLA timers per project
- Custom approval/workflows per project type
- Auto-create projects for employee onboarding
- Dev-team integrations (GitHub, GitLab connectors)

Example Use Case: A Consulting Firm

1. Project auto-created from a confirmed Sales Order

2. Tasks assigned to consultants by skillset
3. Consultants log time against tasks
4. Project manager tracks performance and invoices monthly
5. Deliverables and timesheets archived on completion

Final Thoughts

Ideal for SMBs needing robust project operations, **SugrivaX ERP's Projects Module** helps unify delivery, billing, and collaboration. When integrated with Sales, Timesheets, and Invoicing, it evolves into a powerful Professional Services Automation (PSA) solution.

29. Email Marketing Module – Features

The **Email Marketing Module** in **SugrivaX ERP** allows businesses to create, schedule, automate, and monitor email campaigns—all natively integrated with CRM, Website, Events, and eCommerce modules.

Core Capabilities

1. Campaign Creation

- Define:
 - Subject line
 - Recipients (manual, filtered from CRM, or imported)
 - Scheduled or instant delivery
 - Reply-to address

2. Email Builder

- Drag-and-drop editor (WYSIWYG)
- Supports:
 - Banners
 - Buttons and calls-to-action
 - Product listings
 - Social media links
- Mobile-responsive designs
- Optional raw HTML editing

3. Targeting & Segmentation

- Send to:
 - CRM contacts/leads
 - Newsletter subscribers
 - Event participants
 - Custom tag or filter-based lists
- Segment by interest, location, or behavior

4. Mailing List Management

- Create multiple lists
- Subscription forms for website integration
- Handle opt-ins/opt-outs with consent logging

- GDPR-compliant subscription tracking
- 5. **Automation & Triggers**
 - Schedule emails for later
 - Trigger emails based on:
 - Opens
 - Clicks
 - Inactivity
 - Supports drip campaigns and nurture flows
- 6. **Analytics Dashboard**
 - Real-time tracking:
 - Open rate
 - Click-through rate
 - Bounce/unsubscribe rate
 - UTM tracking
 - Heatmaps and engagement stats

Integrations

Module	Use Case
CRM	Nurture leads, send updates
Website	Signup forms and landing pages
Events	Pre/post event communication
eCommerce	Abandoned cart, product promotions
Marketing Auto	Email journey automation
Surveys	Send feedback requests

Benefits

- No-code campaign creation
- Precision targeting via CRM filters
- Transparent tracking of user engagement
- Automate follow-ups to save time
- Scale campaigns without third-party tools

Use Cases

- Monthly newsletters
- Festive promotions
- Event invites
- Drip campaigns for onboarding
- Product announcements

Customization Ideas

- Reusable branded templates
- Dynamic product blocks (for eCommerce)
- Triggered email flows from purchase behavior

- SMS/WhatsApp integration for multi-channel reach

KPIs & Reports

- Delivery vs bounce stats
- Heatmaps for engagement
- Opt-out reasons
- ROI analytics (linked with CRM data)

Compliance

- Opt-out links by default
- Consent capture with timestamp
- GDPR-ready subscription process

Tips

- Include compelling CTAs
- Optimize send times
- Test before blast
- Clean mailing list regularly

Final Thoughts

The **Email Marketing Module** is perfect for SMBs using the **SugrivaX ERP** ecosystem. It provides a unified experience across CRM, Marketing, and eCommerce without needing costly third-party email tools.

30. SMS Marketing Module – Features

The **SMS Marketing Module** in **SugrivaX ERP** lets businesses send targeted SMS campaigns for reminders, promotions, alerts, and updates—fully integrated with CRM, Sales, Events, and Marketing Automation.

Key Features

1. **Bulk SMS Campaigns**
 - Configure:
 - Sender ID (country-specific rules apply)
 - Message body (160–1600 characters)
 - Recipients (from CRM, leads, customers, lists)
 - Send immediately or schedule later
2. **Targeted Recipients**
 - Segment by:
 - Tags, location

- Past purchases
- Event attendance
- CRM stage (e.g., hot leads)
- 3. **Campaign Builder**
 - Campaign name and goals
 - Personalize SMS using tokens (e.g., name, order ID)
 - Preview content and calculate cost
 - Setup unsubscribe handling
- 4. **Scheduling & Automation**
 - Time-based or behavior-based triggers
 - Combine SMS with email in multi-step workflows
 - Send based on:
 - Stage changes
 - Cart abandonment
 - Event registrations
- 5. **Opt-Out & Compliance**
 - SMS includes STOP instructions if legally required
 - System maintains global unsubscribe list
 - Manual opt-out support via Contacts module

Analytics

- Monitor:
 - Sent vs delivered vs failed messages
 - Click-through rates
 - Bounce data
- Filter results by campaign, user, or list

Integrations

Module	Use Case
CRM	Lead follow-up via SMS
Sales	Order updates, delivery alerts
Events	Last-minute reminders
eCommerce	Promotions, abandoned cart follow-ups
Marketing Auto	Multi-step nurture flows (SMS + email)
Contacts	Subscription and opt-out tracking

Cost Structure

- Based on:
 - Country destination
 - Message length (charged per 160 characters)
- Unicode support included (reduces character limit)
- Uses prepaid or monthly billing credits

Benefits

- High open rate (~90% within minutes)
- Quick campaign setup
- Ideal for urgent communications
- Fully native to **SugrivaX ERP**—no third-party platforms required

Use Cases

- Appointment or delivery reminders
- Time-bound offers or flash sales
- Event RSVPs and updates
- Feedback collection after purchase

Compliance

- Follows telecom regulations (e.g., TRAI, GDPR)
- Tracks unsubscribes and consent
- Auto-maintains audit logs

Tips

- Use short links to track clicks
- Avoid off-hour sending
- Test campaigns first
- Keep messages concise

Final Thoughts

SugrivaX ERP's SMS Marketing Module offers a fast, effective, and compliant way to reach mobile-first customers. When combined with email and automation, it forms a complete multi-channel communication suite.

31. Events Module – Features

The **Events Module** in **SugrivaX ERP** helps businesses organize, promote, and manage events—whether physical, online, or hybrid. From small webinars to global conferences, it offers a unified platform for ticketing, registration, marketing, and post-event analysis.

Key Features

1. Event Creation

- Set up quickly with:
 - Event title, description, banner image
 - Event type (online, onsite, hybrid)
 - Dates, time zone, venue & agenda

- SEO settings for public pages
- Option to publish/unpublish on the website
- 2. **Ticket Management**
 - Define:
 - Free or paid ticket types
 - Early bird, group, VIP tiers
 - Seat availability and cutoff dates
 - Payments integrated via **SugrivaX ERP eCommerce**
- 3. **Online Registration**
 - Public registration pages
 - Custom registration forms
 - Optional approval workflows
 - Auto-confirmation emails with QR codes
- 4. **Attendee Management**
 - Real-time attendee list
 - Manual addition/removal
 - Check-in, badge printing, group tagging
- 5. **Marketing Integration**
 - Promote via:
 - Email campaigns, reminders
 - Social media sharing
 - QR codes for quick access
 - Track campaign success with UTM
- 6. **Website Integration**
 - Auto-landing page with:
 - Agenda, speaker profiles
 - Embedded registration form
 - Maps, social buttons
 - Fully mobile-responsive
- 7. **Online Events Support**
 - Host virtual events via:
 - Zoom, Google Meet, Jitsi, or embedded video
 - Share access links via email or event page
- 8. **Speakers & Agenda**
 - Add speaker bios and photos
 - Create multi-track schedules
 - Time-slot, room, or type-based agenda sorting
 - Export agenda or embed on site
- 9. **Surveys & Feedback**
 - Use **SugrivaX Surveys** to:
 - Collect post-event feedback
 - Analyze satisfaction or NPS

Integrations

SugrivaX Module	Integration Use Case
Website	Event pages & forms

SugrivaX Module	Integration Use Case
Sales	Generate invoices for paid events
Email Marketing	Invitations, reminders, follow-ups
CRM	Convert registrations into leads
Marketing Automation	Drip campaigns for before/after event
Surveys	Collect attendee feedback
Accounting	Record and reconcile ticket revenue

Reporting & Analytics

- Ticket sales by type/date
- Registration vs attendance
- Revenue breakdown
- Satisfaction scores
- No-show analysis

Use Cases

- Webinars, Workshops
- Corporate Conferences
- Product Launches
- Certification & Training Programs
- Customer Engagement Events

Benefits

- All-in-one planning + execution
- End-to-end visibility on attendees
- SEO-friendly event landing pages
- Automated workflows reduce manual effort
- Real-time data and feedback

Pro Tips

- Use tagging to segment attendees for future campaigns
- Warm up leads pre-event, follow up post-event using automation
- Add testimonials or past event highlights for promotion

Final Thoughts

The **Events Module** in **SugrivaX ERP** streamlines everything from setup to post-event feedback. Perfect for marketing and lead-gen teams when combined with CRM and Email Marketing.

32. Discuss Module – Features

The **Discuss Module** in **SugrivaX ERP** functions as a native team communication and collaboration hub. Similar to tools like Slack or Teams, it enables internal messaging tied directly to business records.

Core Features

1. **Inbox & Notifications**

- Unified inbox with:
 - Mentions, DMs, group chats, system alerts
 - Filters: Starred, History, Unread

2. **Channels**

- Create:
 - Public or private group chats
 - Departmental, topic-based, or project-linked discussions
 - Access controls for each channel
 - Threaded conversations

3. **Direct Messaging**

- 1-on-1 real-time messaging
- File sharing, @mentions, emojis
- Typing indicators and instant delivery

4. **Record Integration**

- All records (leads, tasks, invoices) have "chatter"
- Post internal notes or send external messages
- Follow records to get automatic updates

5. **Chatter on Documents**

- Attach files, tag users, record activity
- Track:
 - Stage changes, assignments, approvals
 - CRM lead conversions, etc.

6. **Desktop Notifications**

- Browser alerts for mentions
- Supports Chrome, Firefox, Edge
- Optional email notifications for missed chats

7. **Email Integration**

- Email replies sync into Discuss threads
- Helps manage communication in CRM, Helpdesk, HR, etc.

Mobile Support

- Full Discuss access on the **SugrivaX mobile app**
- Ideal for remote or field teams

Module Integrations

Module	Use Case
CRM	Lead notifications
Projects	Discuss blockers or task updates
Sales	Collaborate on quotes/approvals
Helpdesk	Chat on ticket status
HR	Announcements and onboarding messages

Benefits

- Internal transparency and traceability
- Speeds up decision-making
- Context-aware messaging
- Lightweight and responsive interface

Use Cases

- Project coordination
- Internal approvals
- HR and sales updates
- Department-wide or client-based communication

Pro Tips

- Use @mentions over emails for speed
- Create channels per client or project
- Star key messages for follow-up
- Train teams to use chatter for record tracking

Final Thoughts

Discuss is more than chat—it's deeply tied to business operations. By aligning communication with actual ERP records, it ensures relevant, contextual collaboration across departments.

33. Website Builder Module – Features

The **Website Builder Module** in **SugrivaX ERP** helps businesses launch professional websites using a no-code drag-and-drop interface. It integrates natively with CRM, eCommerce, Events, and other modules.

Key Features

1. **Drag-and-Drop Site Builder**
 - Add sections like:
 - Text, images, videos, forms, pricing tables, testimonials

- Real-time inline editing
- WYSIWYG interface
- 2. **eCommerce Integration**
 - Integrated with SugrivaX's eCommerce:
 - Product pages, cart, checkout
 - Payments (Stripe, Razorpay, PayPal)
 - Shipping and inventory sync
- 3. **SEO & Performance Tools**
 - Clean URLs, meta descriptions, alt texts
 - Page speed optimization
 - Image compression, lazy loading
 - Schema/structured data support
- 4. **Form Builder & Lead Capture**
 - Drag-and-drop forms
 - Auto-create CRM leads from submissions
 - Spam protection via Google Recaptcha
- 5. **Content & Blog Management**
 - Easy blog publishing
 - Categories, tags, author support
 - Social sharing enabled
- 6. **Event Pages**
 - Landing pages for event promotion
 - Registration forms and ticket integration
 - Calendar and scheduling tools
- 7. **Multi-language Support**
 - Manual/auto translations
 - GEO IP-based content targeting
- 8. **Integration with Other Modules**
 - CRM, Email Marketing, Sales, Helpdesk, Elearning
- 9. **Mobile Optimization & PWA**
 - Fully responsive design
 - Progressive Web App support
- 10. **Security & Compliance**
 - SSL-ready
 - Cookie banners, GDPR tools
 - Role-based access control

New Features

- Live preview for all device types
- AI-based content suggestions
- Dynamic snippets for events/products
- Improved theme editor
- Faster load time and SEO boost

Developer Tools

- XML/QWeb templating
- Git integration
- Full HTTP controller support

Use Cases

- Business websites
- Product landing pages
- Online stores
- Career portals
- Course sites
- Event registration microsites

34. Live Chat Module – Features

The **Live Chat Module** in **SugrivaX ERP** offers real-time interaction with website visitors—boosting lead capture, support quality, and customer engagement.

Key Features

- 1. Real-Time Chat**
 - Floating widget on website
 - Backend agents can respond instantly
 - Unlimited chat sessions
- 2. Multi-Device Support**
 - Works on desktop, tablet, mobile
 - Agents can chat via **SugrivaX mobile app**
- 3. Website & Third-Party Integration**
 - Embed on SugrivaX or external websites
 - Integrate with:
 - WhatsApp, Instagram DMs
 - Facebook Messenger (via connectors)
- 4. Operator Assignment**
 - Assign chats based on rules or availability
 - Queue view for agents
 - Notifications for new chats
- 5. Canned Responses**
 - Predefine responses to FAQs
 - Use shortcuts (e.g., /pricing)
- 6. Availability Scheduling**
 - Define business hours
 - Offline message with auto-ticket creation
- 7. Visitor Insights**

- Track:
 - Pages viewed, location, time on site
- Enable personalized support
- 8. **Lead/Ticket Conversion**
 - Convert chat to:
 - CRM lead
 - Sales quote
 - Helpdesk ticket
 - Full chat logs are saved in history
- 9. **Security & Privacy**
 - GDPR compliance
 - Consent collection, history purging
 - Role-based internal access

What's New

- Enhanced operator interface
- Drag-and-drop widget customization
- Routing by department or region
- Auto-greetings based on behavior
- Real-time multilingual translation (Enterprise)

Use Cases

- Customer support on eCommerce
- Pre-sales consultation
- Lead gen for B2B
- Event engagement
- Internal IT/helpdesk chat

Module Integrations

SugrivaX App	Integration Purpose
CRM	Turn chat into leads
Sales	Generate quotes during conversation
Helpdesk	Create tickets from chat
Website	Embed live chat
Discuss	Centralized chat inbox + internal use

35. WhatsApp Integration in SugrivaX ERP – Features

SugrivaX ERP integrates directly with WhatsApp via the official Business API, allowing real-time and automated communication with customers. Whether for marketing, support, or transactional messages, this module empowers you to centralize communication.

Types of WhatsApp Integration

- **Native Integration**

- Built into SugrivaX ERP
- Uses official WhatsApp Business API (via Meta, Twilio, Gupshup, etc.)
- Fully connected with CRM, Sales, Helpdesk, and Live Chat

Core Features

1. **Send WhatsApp Messages from ERP**

- Trigger messages from:
 - CRM leads/opportunities
 - Sales orders, invoices, deliveries
 - Helpdesk tickets and customer profiles
- Use pre-approved templates for transactional messages

2. **Automated Messaging**

- Auto-send:
 - Order confirmations
 - Delivery status
 - Invoice/payment alerts
- Configurable with SugrivaX Studio or Workflow Automation

3. **Two-Way Messaging**

- Chat directly with customers:
 - Via CRM, Helpdesk, or Discuss
- All threads stored in contact history

4. **Message Templates**

- Use Meta-approved templates with dynamic fields
- Supports personalization (e.g., name, order number)

5. **Chat History & Threading**

- Complete chat logs saved under relevant records
- Ensures continuity and traceability

6. **Multi-language & Media Support**

- Communicate in any language
- Share media: PDFs, images, voice notes, emojis, locations

What's New in SugrivaX ERP

Feature	Description
Click-to-Chat Buttons	Add WhatsApp icons on website or product pages
WhatsApp Bot Support	Connect external bots via API/webhooks
WhatsApp Campaigns	Bulk marketing (with opt-in tracking)
Workflow Triggers	Conditional messages based on ERP status changes
Compliance Tools	GDPR-ready with audit logs and opt-in tracking

Integration with SugrivaX Modules

Module	Use Case
CRM	Lead nurturing, instant follow-ups

Module	Use Case
Sales	Share quotations, discuss orders
Invoicing	Send invoice links, payment reminders
Helpdesk	Status updates, customer support
eCommerce	Abandoned cart reminders, order confirmations

Licensing & Requirements

- Requires:
 - WhatsApp Business Account (WABA)
 - Approved Business Solution Provider (e.g., Twilio, Gupshup)
 - Enterprise license of SugrivaX ERP for native integration
- Cost:
 - BSP charges per conversation (varies by country/type)
 - Optional setup fee if using third-party integrators

Considerations

- Template approval delays may occur
- Customer opt-in is mandatory
- Message volume limits apply for new WABA numbers
- Regulatory compliance with GDPR and WhatsApp's commerce policy

Ideal Use Cases

- Lead follow-up with personalized messages
- Transactional alerts: orders, deliveries, payments
- Support tickets via WhatsApp
- Bulk promotional messages (only with consent)

36. E-Commerce Module – Features

The **SugrivaX E-Commerce Module** lets businesses create powerful online storefronts integrated with inventory, accounting, CRM, and marketing — enabling real-time operations and streamlined workflows.

Key Features

1. **Storefront Builder**
 - Drag-and-drop interface with pre-built templates
 - Responsive design with mobile optimization
 - Multi-language and multi-currency
 - Customer-specific pricing and visibility
2. **Product Catalog**
 - Physical/digital product listings

- Product variants (size, color, material, etc.)
- Inventory sync with warehouse data
- Tools for upselling and cross-selling
- 3. **Shopping Cart & Checkout**
 - Guest checkout and account creation options
 - Promo codes, coupons, discounts
 - Shipping rules (flat rate, by zone, by weight)
 - Integrates with Stripe, Razorpay, PayPal, etc.
- 4. **SEO & Marketing Tools**
 - Clean URL structures and meta tags
 - Google Analytics and social pixel integrations
 - Email marketing via SugrivaX Marketing
- 5. **Order Management**
 - Auto-generate sales orders
 - Real-time inventory adjustments
 - Invoicing, shipping, and delivery tracking
 - RMA (Return Merchandise Authorization) support
- 6. **Customer Portal**
 - View/download orders, invoices, and quotes
 - Real-time order status updates
 - Message vendors via integrated chatter
- 7. **Product Reviews**
 - Moderated reviews and star ratings
 - Feedback displayed on product pages
- 8. **Security & Compliance**
 - SSL-enabled
 - GDPR tools and privacy compliance
 - Secure login and data management

Integrations with Other Modules

Module	Purpose
Sales	Sales order automation
Inventory	Sync stock and product availability
Accounting	Generate invoices and apply taxes
Marketing	Drive traffic with email campaigns, coupons
CRM	Lead tracking from customer behavior
Live Chat	Engage with visitors in real time
Studio	Customize product forms and flows

Architecture & Technical Features

- Built on Python with PostgreSQL backend
- QWeb templating for custom themes
- REST API support
- Compatible with:
 - SugrivaX Cloud (sh), On-Premise, or Hosted

- Multi-website and multi-company support

Business Benefits

- Unified platform — no external eCommerce tool required
- Seamless data flow across ERP
- Reduced IT overhead and integration costs
- Highly customizable with minimal coding
- Accelerated launch via built-in templates

Popular Use Cases

- Small Retailers: Apparel, electronics, cosmetics
- B2B Portals: Client-specific catalogs and pricing
- Subscription Products: Monthly/annual plans
- Digital Goods: PDFs, software, videos
- Dropshipping: Linked with procurement & inventory

37. e-Learning Module – Features

SugrivaX eLearning Module offers a robust platform for creating and delivering online education for internal training, public courses, or certifications—fully integrated with CRM, eCommerce, HR, and Marketing.

Key Features

1. **Course Creation**
 - Structured course layout with sections & content blocks
 - Upload videos, PDFs, slides, documents
 - Access controls: internal, portal, or public users
2. **Lesson Types**
 - Videos, content pages, quizzes, PDFs, slides
 - Interactive assessments: MCQs, scoring, time-limits
3. **Certification**
 - Auto-generate certificates on passing
 - Time-bound exams and grading criteria
 - Randomized questions for each test attempt
4. **Learner Engagement**
 - Discussion forums per course
 - Leaderboards, badges, gamified points
 - Email reminders and notifications
5. **Progress Tracking**
 - Monitor progress, time spent, quiz scores
 - Instructor and learner dashboards
 - Export reports for admin review

6. Monetization (if public)

- Sell via SugrivaX eCommerce
- Auto-enroll on payment
- Generate invoices and handle taxes

Integrations

Module	Purpose
Website	Course listing, public access
eCommerce	Payment & cart functionality
CRM	Track learner leads or corporate clients
Marketing	Launch campaigns for new courses
HR/Employees	Internal training programs, onboarding
Surveys	Collect feedback, 360° assessments
Gamification	Boost learner motivation
Studio	Customize views and dashboards

Reports & Analytics

- Course views, completions, ratings
- Quiz performance, time metrics
- Learner activity & leaderboards
- Revenue and enrollment tracking
- Certificate download tracking

Common Workflows

- **Internal LMS (HR):**
 1. HR uploads course
 2. Auto-assign to staff
 3. Completion triggers certification
 4. Linked with HR records
- **Public Platform:**
 1. Instructor uploads and prices course
 2. Users enroll and pay
 3. Learning and certificate upon completion

Use Cases

Use Case	Example
Corporate Training	Compliance, onboarding, SOP training
Customer Education	Product usage, tutorials
Certifications	Internal or paid certifications
Online Academies	Sell courses in tech, language, etc.
NGOs & Impact Projects	Free courses for upskilling or outreach

38. Timesheet Module – Features

The **SugrivaX Timesheet Module** enables accurate time tracking by employees, contractors, or teams—ideal for billing, resource planning, payroll, and project reporting.

Key Features

1. **Time Logging**
 - Manual or timer-based logging
 - Weekly/daily entries
 - Mobile, desktop, and web input
 - Drag-and-drop UI
2. **Task-Based Entries**
 - Log against project tasks
 - Auto-fill data from assigned tasks
 - Link with sales orders for billable projects
3. **Billable Hours**
 - Define billable vs non-billable tasks
 - Create client invoices from approved hours
 - Fixed or time-based contract support
4. **Approvals**
 - Custom approval workflows
 - One-level or manager-only
 - Lock timesheets after deadline
5. **Reporting & Dashboards**
 - Project-level and employee-level summaries
 - Utilization reports
 - Billable vs non-billable stats
 - Exportable to Excel or PDF
6. **Planning & Resource Forecasting**
 - Compare planned vs actual hours
 - Adjust task allocations accordingly
7. **Reminders & Notifications**
 - Remind users to submit timesheets
 - Via email, mobile, or browser alerts

Integrations

App	Purpose
Project	Link time to specific tasks
HR/Payroll	Time-based salary & attendance
Invoicing	Client billing based on hours
Planning	Compare estimates with logged hours
Field Service	Log hours per job/site
Leaves	Restrict entries during time-off
Studio	Customize entry forms and reports

User Interfaces

- Web interface
- Android/iOS apps
- Desktop app
- Chrome extension (SugrivaX Cloud)
- API access for third-party loggers

Deployment Scenarios

- **Agencies/Consulting:** Track billable hours & invoice clients
- **HR/Internal:** Employee productivity and attendance
- **Freelancers:** Manage time for multiple clients or projects

Reports & Metrics

- Hours logged by person/project
- Timesheet compliance
- Cost vs revenue per task
- Overtime and underutilization
- Exportable dashboards

Advanced Capabilities

Feature	Description
Rounding Rules	Round entries to nearest 15/30/60 mins
Multi-Currency	Invoice clients in native currencies
Activity Tags	Categorize tasks (e.g., support, R&D)
Geo-Tracking	Log location via mobile
Offline Support	Submit offline, sync when online

Add-ons Available

- Google Calendar/Outlook sync
- Email bot reminders
- Client sign-off on PDFs
- Real-time alerts on time budget breach

39. Subscription Module – Features

The **Subscription Module** in **SugrivaX ERP** empowers businesses to manage recurring revenue streams, automate billing, and foster long-term customer engagement. It is ideal for SaaS providers, digital platforms, clubs, training institutes, and any business offering periodic services or products.

Key Features of SugrivaX Subscription Module

1. Subscription Plan Configuration

- Create multiple subscription plans with different cycles (monthly, quarterly, annually)
 - Supports **prepaid** and **postpaid** models
 - Add **trial periods**, **discounts**, and **setup fees**
 - Include one-time **add-ons** or services
 - Set **auto-renewal** or **manual renewal** preferences
-

2. Automated Recurring Invoicing & Payments

- Auto-generate invoices as per billing frequency
 - Seamless integration with major **payment gateways**
 - Auto-debit support using saved tokens/mandates
 - Payment retries on failure
 - Supports **partial payments**, **refunds**, and **credit notes**
-

3. Subscription Lifecycle Management

- Track status transitions:
New → Active → Renewed → Expired → Cancelled
 - Automated reminders for renewals
 - Modify subscriptions mid-cycle (upgrade/downgrade)
 - Pause or resume subscriptions on demand
-

4. Customer Portal Access

- Customers can:
 - View subscription history
 - Download invoices
 - Upgrade/downgrade/cancel subscriptions
 - Manage billing and payment methods
-

5. Analytics & Reporting

- Key Metrics:
 - **MRR, ARR, churn rate, renewal rate**
 - **Customer lifetime value**
 - Forecast revenue and pipeline
 - Filter by product, geography, salesperson, or segment
-

6. Integration with Other SugrivaX ERP Apps

Module	Integration Purpose
CRM	Track leads, automate conversions
Sales	Convert quotes to subscriptions
Accounting	Auto-post entries, handle taxes and journals
Email Marketing	Trigger renewal or upsell campaigns
Helpdesk	Provide tier-based support

7. Contract and Compliance Features

- Generate contracts with **digital signature** support
 - Maintain version history and audit logs
 - GDPR-compliant customer data handling
 - Logs all renewals, cancellations, and modifications
-

8. Mobile-Friendly & Cloud-Ready

- Access via mobile, tablet, or desktop
 - Responsive UI across devices
 - RESTful API available for external integrations
 - Compatible with:
 - **SugrivaX Cloud, On-Premise, and Private Hosting**
-

Common Use Cases

- SaaS application subscriptions
 - E-learning platforms (course access)
 - Print/digital magazine subscriptions
 - Gym or fitness coaching plans
 - AMC & Managed IT services
-

40. Survey Module – Features

The **Survey Module** in **SugrivaX ERP** allows you to build, publish, and analyze surveys, quizzes, and feedback forms. It's ideal for gathering insights from customers, employees, students, or event participants.

1. Survey Creation & Design

- Intuitive drag-and-drop builder
- Supported Question Types:
 - MCQs (single/multiple answers)

- Matrix/rating grid
 - Short/long text inputs
 - Date and numerical fields
 - Sliders, stars, emojis
 - Conditional logic (skip, show/hide, page logic)
 - Multi-page structure with custom start/end messages
 - Toggle for required/optional questions
 - Multi-language survey support
-

2. Branding & Customization

- Add logos, themes, background images
 - Custom color schemes and fonts
 - Mobile/tablet responsive layouts
 - Hide/show progress bar
 - Option to anonymize responses
-

3. Quizzes and Certification Tests

- Auto-scoring logic for right/wrong answers
 - Set pass/fail thresholds
 - Display results post-submission
 - Auto-generate certificates
 - Integration with **eLearning** and **HR training modules**
-

4. Publishing & Sharing

- Public or private survey access
 - Generate direct links or embed codes
 - Restrict via login, tokens, or email invitations
 - Schedule opening/closing dates
 - Limit to one response per user
 - Auto-close on reaching target responses
-

5. Response Management

- Live tracking of responses
- Identify incomplete surveys
- Export individual or bulk responses (Excel, CSV)
- Filter results by respondent, date, or answer
- Admins can reopen submitted answers

6. Analytics & Reporting

- Real-time dashboard views
- Charts: pie, bar, score summaries
- Drill-down analytics per respondent
- Downloadable summary reports (PDF)
- Visualize trends across question sets

7. Integration Capabilities

Module	Purpose
CRM	Capture post-interaction feedback
HR	Employee assessments and engagement surveys
eLearning	Quiz learners, auto-certify upon passing
Email Marketing	Campaign-based survey distribution
Events	Feedback after webinars or conferences

8. Security & Access Control

- Secure with token-based or user-based access
- Control result visibility per respondent
- Anonymous mode for sensitive topics
- GDPR-compliant data handling and consent logs

9. Automation & Workflows

- Assign surveys after specific triggers (e.g., Helpdesk closure)
- Auto-issue certificates to passed users
- Send reminders to non-respondents
- Trigger actions based on survey scores (e.g., HR alerts)

Common Use Cases

- Customer satisfaction surveys
 - Net Promoter Score (NPS) campaigns
 - Training assessments with certifications
 - Exit interviews and employee surveys
 - Product feedback and market research
 - Event feedback and RSVP tracking
-