



Introduction



Credence Technologies

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Credence cBiz - Introduction

Credence cBiz is a customisable software application for small and medium businesses with capabilities of integrating various operating modules as per functioning structure of the organisation. It comes with bundle of powerful yet user friendly features to enable you to effectively and efficiently manage your business.

Credence cBiz consists the following operating modules:

Sales Module

- Principal Data / Price List Management
- Customer Data Management
 - Contacts, Alerts Messages, Price Grades, Assign Sales Executive, etc
- Inquiry Registration
- Quotation Generation
 - In Foreign Currency or in Indian Rupees from Price List along with Item Features, Image & Email Quotation in PDF with Attachments
 - With standard as well as desired modifications of Terms/Conditions
 - If required, revise quotations with previous details being archived
- Quotation Follow-up
 - Sales Follow-up with Order Probability & Attachments
 - Filter quotations as per desired parameters i.e. principal, branch, state, station, customer, executive, amount, order probability, etc.
 - Quotation closure as per desired status options

Import/Direct Order Management

- Register Order Items along with extra supplies
- Calculate commission as difference between net value & order value, as absolute amount or as percentage of order amount
- Set payment terms as Advance, LC, Bank Docs or Afterwards
- Performance Bank Guarantee, Warranty Offered, Installation Required
- Monitor Order Processing Stages
- Set due dates for processing stages
- Incentive calculation as per desired parameters

Stock Supply Order Management

- Registers ordered items to be supplied from stocks along with extra supplies
- Set schedules for due dates
- Review Pending Orders Amount or Quantity-wise
- Compare pending order items with stock status, review shortage and in-process quantities
- Generate challans/invoices from orders

Inventory Management & Control

- Monitor Godown-wise Stock Status by applying many filter options like principal, brand, item code, item name, item group, batch expiry, quantity, etc
- Quick Item Summary - showing stock status, orders-in-hand, movement, etc.
- Alerts on minimum/maximum and re-order levels

- Review stock ageing, movement & valuation
- Generate Purchase Orders for short items
- Monitor pending Purchase Orders
- Register Local/Import Purchases
- Issue & Monitor Returnable Challans
- Manage Stock Transfer/Reconciliation/Replacement, etc.

Accounts Management & Control

- Payment/Receipt, Debit/Credit Note entries
- Sales/Purchase Bills
- Alerts on Pending Outstanding (Receivables/ Payables)
- Alerts on Pending Forms
- Quick Party/Account Summaries
- Payment & Form Reminders
- Balance Sheet/ Profit & Loss/Tax Reporting

Service Support & AMC/CMC Management & Control

- Register Service Request for Repair/Installation
 - Generate Service Estimates
- Convert to Service Job
 - Follow-up entries based on service reports/follow-up actions
 - Generate invoices for parts and service charges
- Register AMC/CMC Jobs
 - Start Date/Due Date, Amount as lump sum/item-wise
 - PMS Schedules/Invoice Schedules
- Alerts on AMC/CMC Renewal, Preventive Visits, AMC Invoices

Company Structure with User Defined Rights for Data Access/Control

- Set Head Office/Branch Details
- Set Divisions, assign them to employees/transactions
- Set Location Hierarchy - Zones, Branches, States, City/Stations
- Maintain Employee Database
- Manage User Account for designated Employees with Data Access/Module Rights

Powerful & Convenient Utilities/Features

- Task Manager – assign & monitor tasks given to colleagues
- Record Log History & Attachments with Transactions, Items, Parties & Employees
- Configurable Voucher Series
- Item Batch/Serial Number Management
- Facility to Merge Duplicate Masters
- Bulk update options on Item/Party Masters & re-build options for transactions
- User Activity Log Details
- Reminders/Alert Dashboard/Overall Summaries
- Import/Export Data between multiple companies
- Import/Export from Excel
- Emails through Outlook/Send bulk emails to Customers
- Database Backup/Restore Facility

Production Management & Control

- Bill of Materials
- Product Costing
- Production Planning as per Orders or Stock Status
 - Assessment of Raw Material/Intermediate requirements
- Production Job
 - Issue/Receipt of Materials
 - Update Job Completion Status

Incentive Calculations

- Turnover based Incentive Slabs
- Order based Incentive
 - Qualify/Un-qualify Invoices for Incentive
 - Distribute Incentive Amount among Executives

HARDWARE REQUIREMENTS

The minimum hardware requirement to run Credence cBiz is a PC with Pentium IV (or equivalent) Processor with 256 MB RAM, Monitor with 800 x 600 resolution, Hard Disk Drive with 500MB of free disk space.

OPERATING ENVIRONMENT

Credence cBiz is available on any 32-bit Windows Operating System (like Windows-98 / NT / 2000 / XP / Vista / Windows7) in both Single-user and Multi-user versions.