



# QuantX Ops — Operator Guide

Doing the daily work: your records, time and leave, customers, projects, material and money.

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# 1. Welcome to QuantX Ops

This guide is for **operators**: the people who do the daily work in the company — marking time, taking leave, following up customers, raising material, delivering projects, recording what was done. If you also set the company up and keep it running, the **Administrator Guide** covers that side.

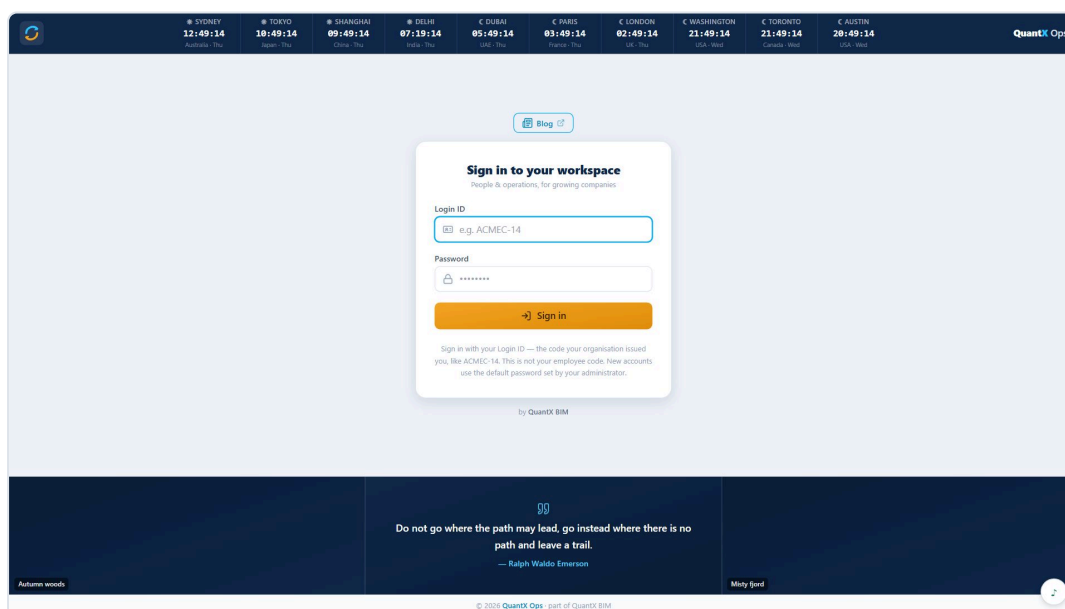
QuantX Ops keeps people, customers, projects, stock and accounts in one place, so the same figure is never typed twice. What you do on one screen shows up wherever else it matters: a leave you apply for appears in your manager's Approvals, then on your Attendance calendar, then in the Leave Ledger that administrators see.

Every screen in this guide was captured from a demonstration company, so the names and amounts are not real.

## Signing in

Open the QuantX Ops sign-in page and enter two things:

| Field           | What to enter                                                                                                                                  |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Login ID</b> | The code your organisation issued you: the company code, a dash and a number, for example CONCR-117 . This is <b>not</b> your employee code.   |
| <b>Password</b> | The password you set. Your administrator gives you an initial password or an activation link the first time; you are asked to choose your own. |



*The sign-in page. If the password is wrong several times in a minute you are asked to wait briefly before trying again.*

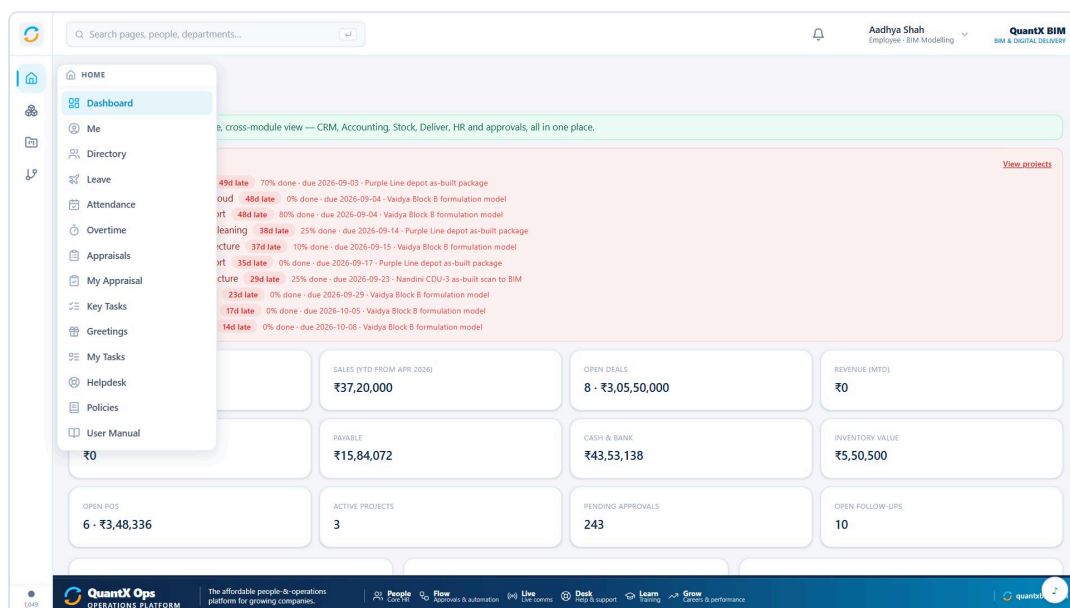
If you forget your password, ask your administrator to issue a new one. You can change your own at any time (see chapter 2).

## Finding your way around

The top bar is the same on every screen:

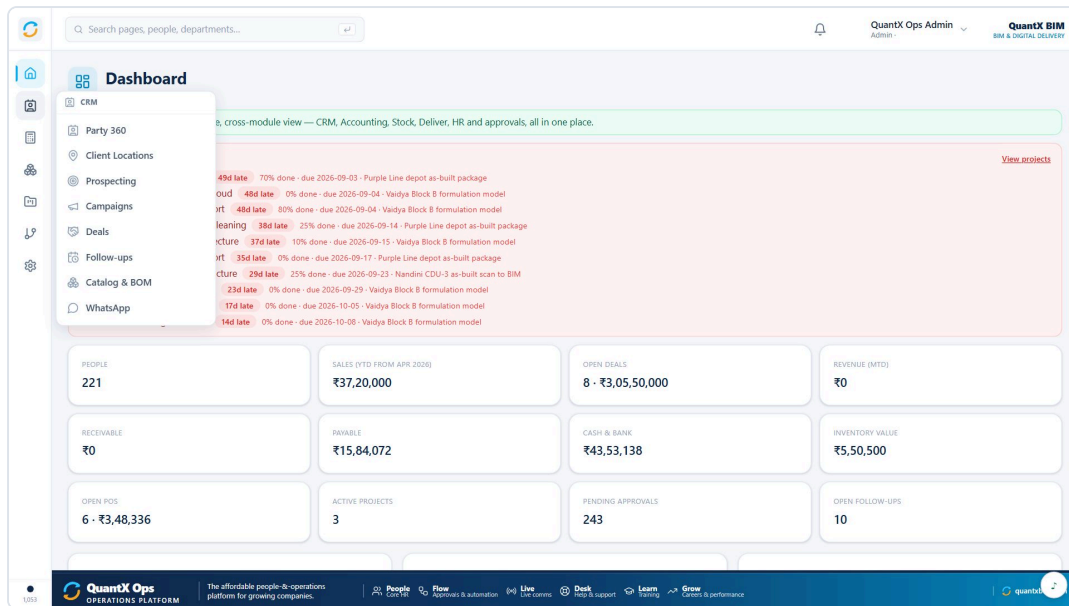
- **Search** (top left): type a page name, a person or a department, and press Enter to jump straight there.
- **The bell**: your notifications.
- **Your name** (top right): opens your profile menu, where you can open **My Profile**, **Change Password**, the **User Manual**, and **Sign out**.

The narrow **icon rail** on the left is the menu. Each icon is a group of screens. Point at an icon, or click it, and the group opens as a flyout listing its screens. The icons you see depend on your role: you are only shown what you are allowed to use, so you never wade through screens that are not yours.



*The Home group, opened from the first icon on the rail. This is where an operator spends most of the day.*

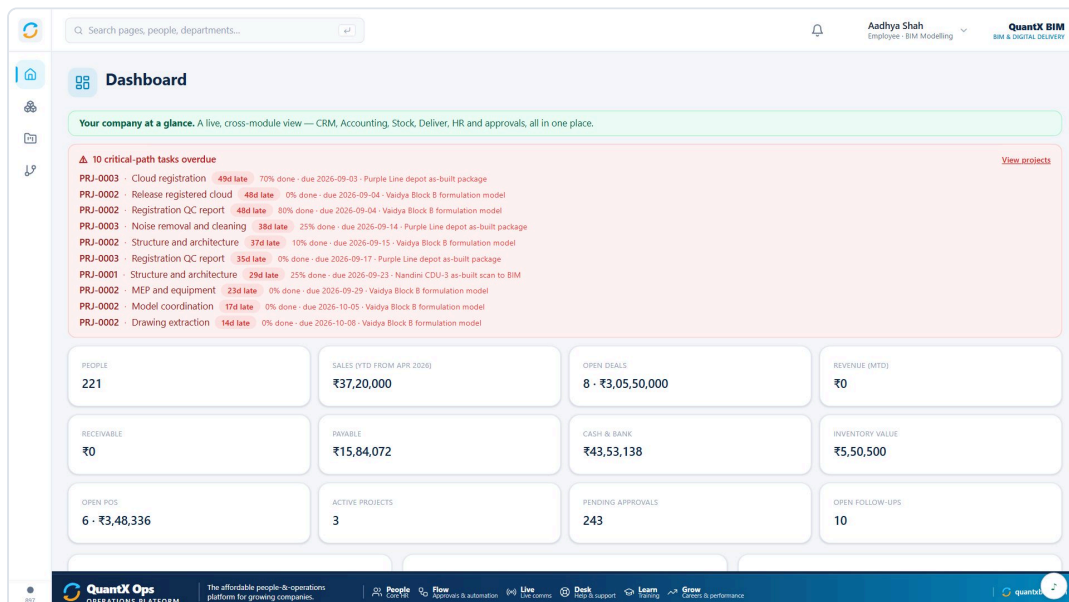
A manager or someone with CRM, stock or accounting duties also sees the matching groups.



The CRM group, shown for a user who works with customers. The same pattern applies to Accounting, Stock, Deliver and Workflow.

## Your Dashboard

**Dashboard** is the first screen after signing in: *your company at a glance*. Along the top, a red alert lists critical-path project tasks that are overdue. Below it are tiles for **People**, **Sales (year to date)**, **Open deals**, **Revenue**, **Receivable**, **Payable**, **Cash and bank**, **Inventory value**, **Open POs**, **Active projects**, **Pending approvals** and **Open follow-ups**. What you see depends on your role.

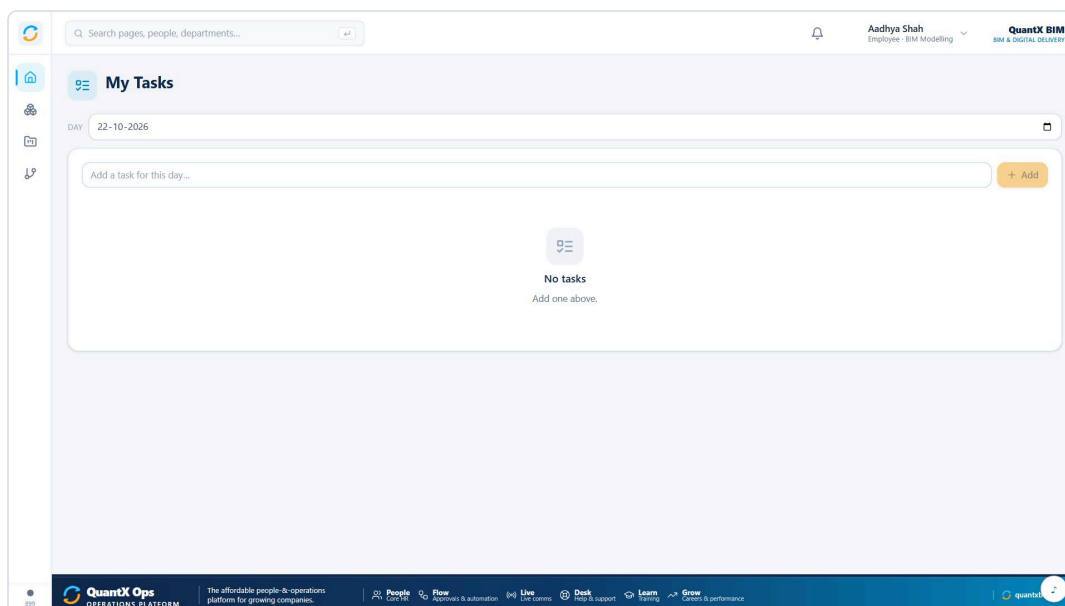


The Dashboard of the demonstration company. The red alert links through to the projects behind it.

## My Tasks

**My Tasks** is your own to-do list for each day. Pick the day at the top, type a task in the box and click **Add**. Tick the box beside a task when it is done and it is struck through; the bin icon deletes it. It is private

working space: it does not create work for anyone else.

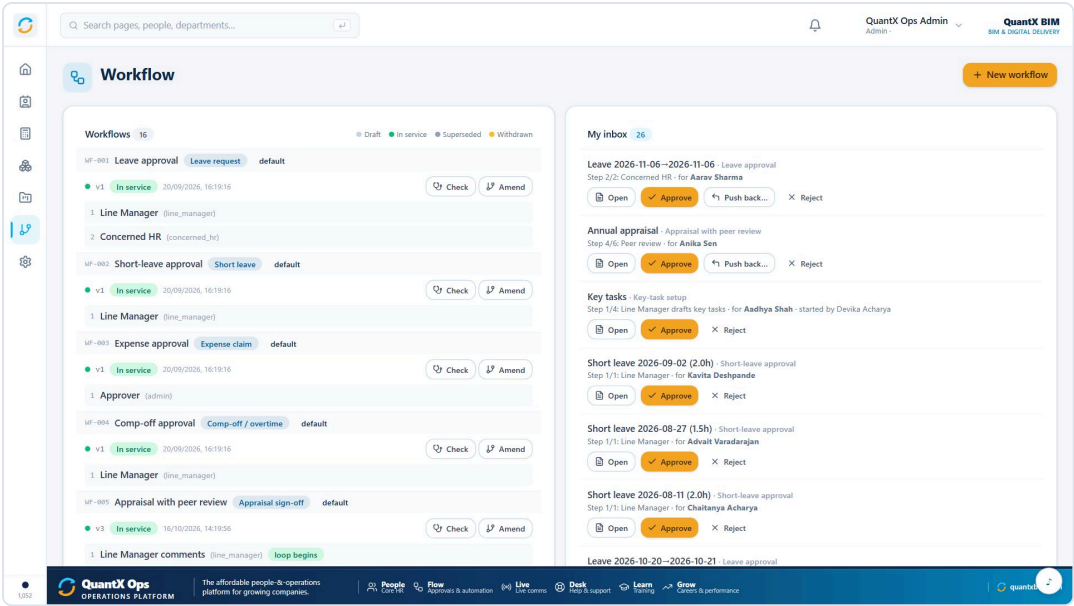


*My Tasks for one day. The list is empty until you add something.*

## Approvals

Some things need a decision from someone other than the person who raised them: a leave request, an expense claim, an appraisal step. When the next decision is yours, it appears in your **Approvals** inbox (Workflow group). Each item shows what it is, which step of the route it is on, and who it is for, with four actions:

| Action              | What it does                                                                                                                                                                  |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Open</b>         | Shows the whole request: its details, any attachments and its history. You can write a <b>review comment</b> there before you approve, and save a draft if you are not ready. |
| <b>Approve</b>      | Approves it in one click and passes it to the next step, or completes it if you are the last.                                                                                 |
| <b>Push back...</b> | Sends it back to an <b>earlier step</b> so it can be corrected. You choose the step and <b>must give a reason</b> .                                                           |
| <b>Reject</b>       | Refuses it. You are asked for a reason.                                                                                                                                       |



The Approvals inbox of an approver with 26 items waiting. The workflow list on the left is the administrator's design view; operators see only the inbox.

Chapter 10 covers raising your own requests and what the statuses mean.

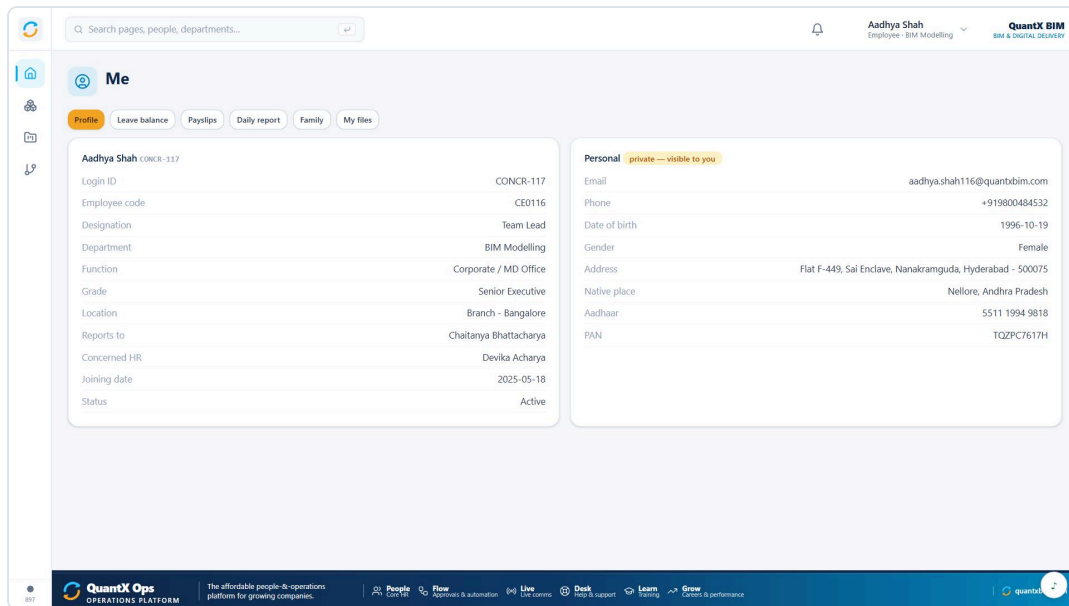
## 2. Me and my records

### Me

**Me** (Home group) holds your own record. It has six tabs along the top:

| Tab           | What it shows                                                                                                                                                                   |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Profile       | Who you are in the company: Login ID, employee code, designation, department, function, grade, location, who you report to, your concerned HR contact, joining date and status. |
| Leave balance | What you have left of each leave type.                                                                                                                                          |
| Payslips      | Your payslips, month by month.                                                                                                                                                  |
| Daily report  | Your daily report entries.                                                                                                                                                      |
| Family        | Your family details, used for greetings and records. You maintain this yourself.                                                                                                |
| My files      | Documents attached to your record.                                                                                                                                              |

The **Personal** card beside your profile (email, phone, date of birth, gender, address, native place, Aadhaar and PAN) is marked *private* — *visible to you*.

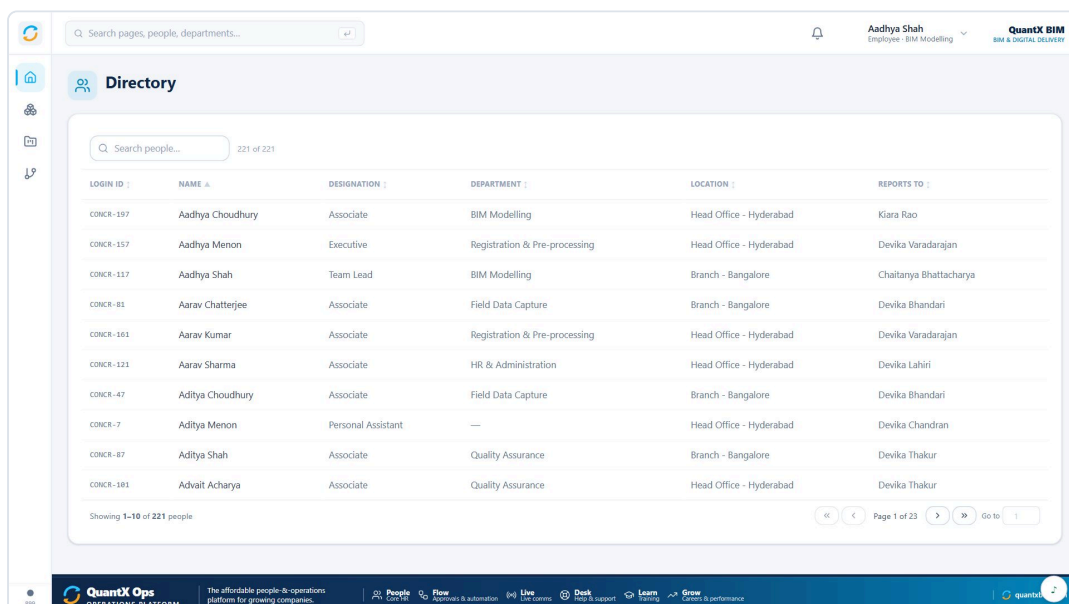


The Profile tab. Your organisation details are kept up to date by your administrator; the personal details are yours to check.

If something on your profile is wrong, tell your concerned HR contact: organisation details such as your seat, grade and reporting line are set by the administrator, not by you.

## Directory

**Directory** lists everyone in the company: Login ID, name, designation, department, location and who they report to. Type in the search box to filter, click a column heading to sort, and use the page controls at the bottom to move through the list.



The Directory, 221 people over 23 pages. Use it to find a colleague's Login ID, department or manager.

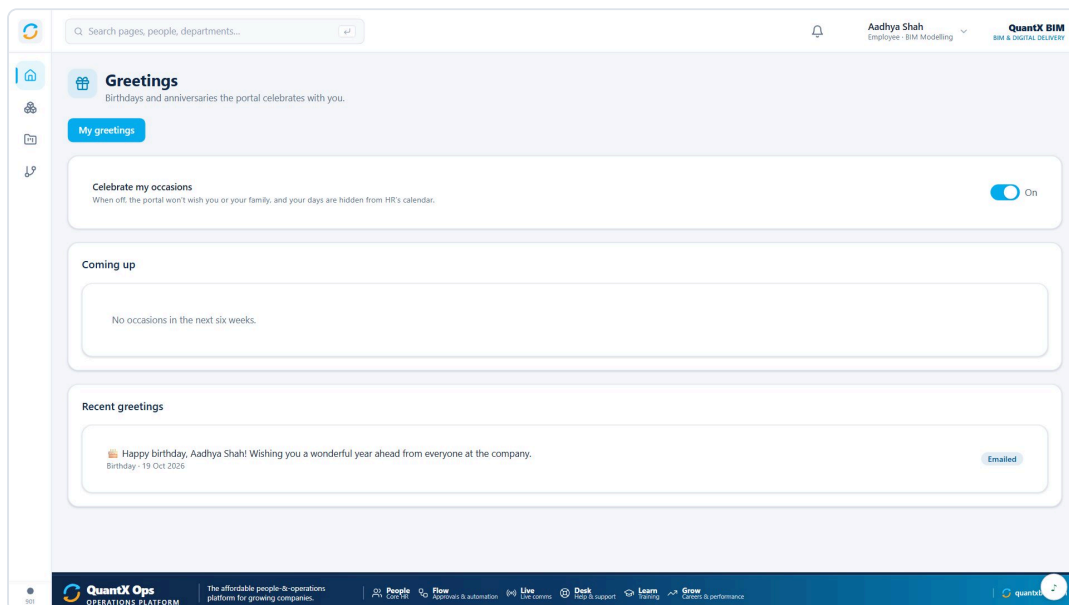
## Policies

**Policies** (Home group) lists the company's policies, each with its category (for example HR, Finance or IT) and the date it was published. Click **Download** to read one. Everyone can read them; only an administrator can publish or remove a policy. If you expect a policy and it is not there, ask your administrator.

## Greetings

QuantX Ops can wish colleagues on **birthdays and work anniversaries**, and your own occasions are included. **Greetings** shows what is coming up in the next six weeks and the greetings sent recently.

The switch **Celebrate my occasions** is yours to control. When it is off, the portal does not wish you or your family, and your dates are hidden from HR's calendar.

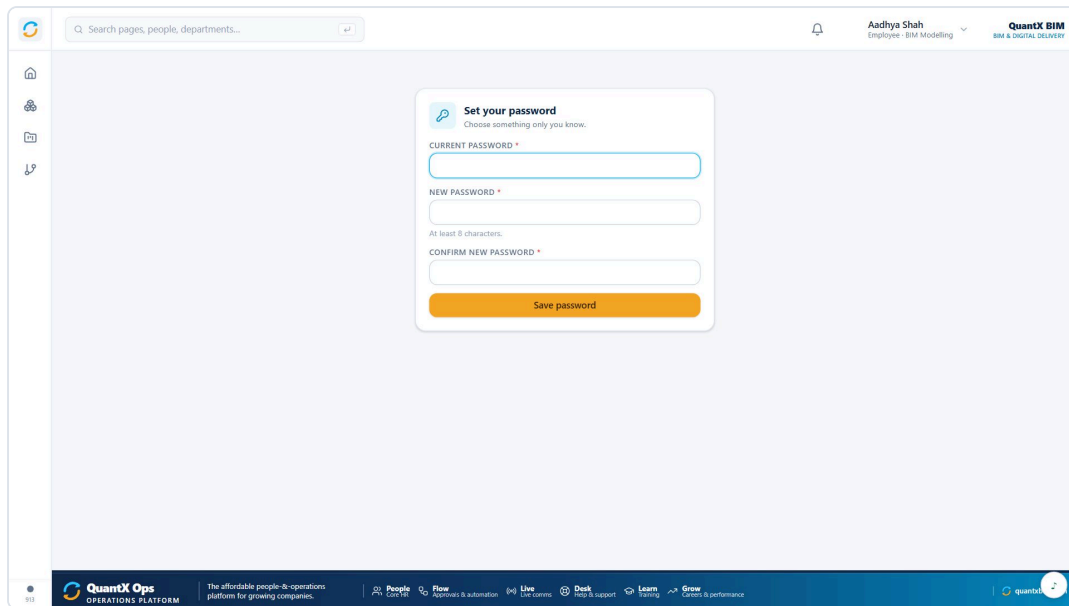


*Greetings. The "Emailed" tag shows that the wish also went out by email.*

## Changing your password

Open your name at the top right and choose **Change Password**.

| Field                       | Notes                                                  |
|-----------------------------|--------------------------------------------------------|
| <b>Current password</b>     | The one you use now.                                   |
| <b>New password</b>         | At least 8 characters. Choose something only you know. |
| <b>Confirm new password</b> | Type it again, then click <b>Save password</b> .       |



Set your password. You may be sent here the first time you sign in, until you choose your own.

## 3. Attendance, leave and overtime

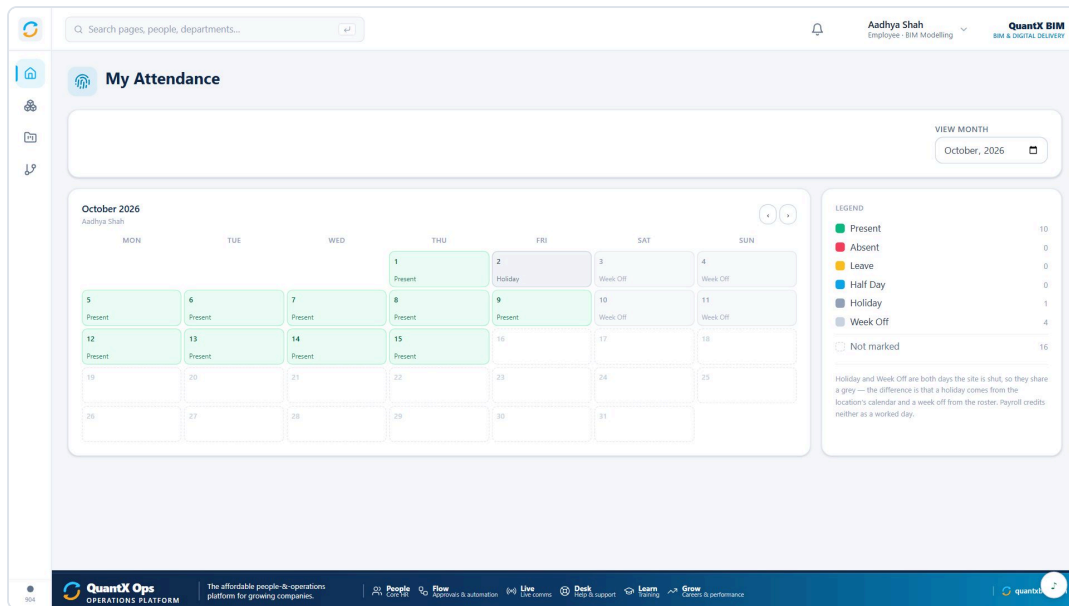
### My Attendance

**Attendance** (Home group) shows one month as a calendar, one box per day. Use the **View month** box or the small arrows beside the month name to move between months.

Each day is coloured by what was recorded, and the legend on the right counts the days of each kind for the month:

| Colour     | Status            | Meaning                                      |
|------------|-------------------|----------------------------------------------|
| Green      | <b>Present</b>    | You worked that day.                         |
| Red        | <b>Absent</b>     | You were not at work and no leave covers it. |
| Yellow     | <b>Leave</b>      | An approved leave covers the day.            |
| Blue       | <b>Half Day</b>   | A half day worked.                           |
| Grey       | <b>Holiday</b>    | A holiday on your location's calendar.       |
| Light grey | <b>Week Off</b>   | Your weekly off, from the shift roster.      |
| Blank      | <b>Not marked</b> | Nothing has been recorded for that day yet.  |

Holiday and Week Off share a grey because both are days the site is shut. The difference is where they come from: a holiday comes from the **location's calendar**, a week off from the **roster**. Payroll credits neither as a worked day.



October 2026 for the demonstration employee: ten days present, one holiday, four weeks-off, and the rest of the month not marked yet.

Your attendance is recorded for you, by the biometric device, by your manager, or by your administrator, depending on how your company runs it. If a day that should be Present shows **Not marked** or **Absent**, speak to your manager: it is corrected by them, not here. Approved leave appears on the calendar by itself, as described next.

## Applying for leave

Open **Leave** (Home group). The form on the left is all you need:

1. Choose the **Type** of leave. The types are your company's own; the list shows the ones you may use.
2. Pick the **From** and **To** dates. For a single day, use the same date twice. If you leave a date empty you are told *Pick the dates*.
3. Write the **Reason** (optional but helpful for the person who approves).
4. Click **Apply**. You see *Leave applied — routed for approval*.

The request goes to the approvers your company has set for leave, usually your line manager and then your concerned HR contact, one after the other. Each sees it in their **Approvals** inbox in turn.

| TYPE | DATES                   | DAYS | REASON                      | STATUS   |
|------|-------------------------|------|-----------------------------|----------|
| SL   | 2026-10-10 ~ 2026-10-10 | 1    | Not keeping well            | Pending  |
| CL   | 2026-08-20 ~ 2026-08-20 | 1    | Personal work               | Approved |
| EL   | 2026-07-10 ~ 2026-07-12 | 3    | Family function out of town | Approved |

The Leave screen: the application form on the left, **My requests** on the right with each request's type, dates, days, reason and status.

**My requests** keeps the history. Each row has a status:

| Status                  | What it means                                                                                      |
|-------------------------|----------------------------------------------------------------------------------------------------|
| <b>Pending</b> (amber)  | Waiting for an approver.                                                                           |
| <b>Approved</b> (green) | Approved. The days now show as <b>Leave</b> on your Attendance calendar and come off your balance. |
| <b>Rejected</b> (red)   | Refused by an approver.                                                                            |
| <b>Withdrawn</b> (grey) | Withdrawn before a decision.                                                                       |

Your balance of each leave type is on **Me**, under the **Leave balance** tab. The Leave Ledger that administrators see records every movement of that balance, so a figure can always be traced to the request that caused it.

## Applying for permission (a few hours)

When you need only a few hours away within a working day, such as arriving late or leaving early, do not apply for a day of leave. Open **Apply for Permission** (Home group, just under **Leave**).

| Field         | What to enter                                             |
|---------------|-----------------------------------------------------------|
| <b>Date</b>   | The day you need the time off.                            |
| <b>Hours</b>  | How many hours, more than 0 and up to 8.                  |
| <b>Kind</b>   | <i>Late arrival, Early leaving or Out during the day.</i> |
| <b>Reason</b> | A short reason for your manager.                          |

Click **Apply**. Your line manager approves it from their **Approvals** inbox. **My permissions**, on the same page, lists every request with its date, hours, kind and status: *Pending, Approved, Rejected* or *Cancelled*. Permission is separate from your leave balance: it does not use up leave days.

## Overtime and comp-off

**Overtime & Comp-off** (Home group) is where you claim extra hours and turn them into days off. The strip across the top states your company's rule for your grade and where you stand:

- **Eligible for overtime**, the **minimum claim** (for example 1 hour), and how many hours make **one comp-off day** (for example 8).
- **Approved, Awaiting approval, Already taken** and **Available** hours, so you know what you can still spend.

*Overtime & Comp-off. Claims on the left, comp-off applications on the right.*

**To claim overtime** (left panel):

1. Enter the **Date worked** and the **Hours**.
2. Choose **Where the hours come from**: *Attendance — I was marked present that day*, or *Field work* for work away from the usual site. The claim is **checked against your attendance for that date**.
3. Add a **Note** if useful, then click **Submit claim**.

A pending claim shows a **Withdraw** link so you can take it back before anyone decides. Once approved it counts towards your available hours.

**To turn hours into a day off** (right panel): enter the **OT hours to spend** (a full day, for example 8), choose the **Day off**, and click **Apply**. Below the form, the list of **Approved, not yet taken** claims shows which nights the hours would be drawn from. Tick the ones you want to spend, or leave them all unticked and the oldest go first. If the comp-off is rejected, the hours return to those same claims.

Hours under a comp-off request that is still awaiting approval count as *taken*: they are committed and not available for something else.

## 4. Appraisal and key tasks

QuantX Ops measures people against **what their position requires**, not against a blank sheet. Every position (a "seat") carries a set of requirements, called KPIs, each with the level the seat needs. Your appraisal rates you on those same KPIs, so the gap between what the seat needs and where you are is visible — and that gap is what training aims at.

### My Appraisal

Open **My Appraisal** (Home group). At the top, choose the cycle from the list (for example *FY 2026-27 Annual*). The card below it names your position, the cycle dates and **where the form is now**, for example *HR review and rating*.

The line under the card tells you what, if anything, is **yours to do**:

- When it is with you, it says so, for example *Rate yourself against every KPI, list your key tasks, then send it to your line manager*.
- When it is with someone else, it says *Nothing to do right now* and who has it.

| KPI                                            | CATEGORY    | REQUIRES | SELF | LINE MGR | REPORTING MGR | SKIP LEVEL | PEER | HR |
|------------------------------------------------|-------------|----------|------|----------|---------------|------------|------|----|
| Collaboration & teamwork<br>COLLAB             | Behavioural | 3        | 4    | 3        | 3             | 3          | 2    | 2  |
| Documentation & standards adherence<br>DOCSSTD | Behavioural | 3        | 3    | 3        | 3             | 3          | 3    | 3  |
| Deliverable quality<br>DEQ                     | Functional  | 4        | 4    | 4        | 4             | 4          | 4    | 4  |
| On-time delivery<br>OTD                        | Functional  | 4        | 5    | 4        | 4             | 4          | 4    | 4  |
| Communication effectiveness<br>COMM            | Leadership  | 3        | 3    | 3        | 3             | 3          | 2    | 2  |
| Team development & mentoring<br>TEAMDEV        | Leadership  | 3        | 3    | 3        | 3             | 3          | 3    | 3  |

An appraisal already with HR for review. The table shows each KPI, its category, the level the position **requires**, and the rating given by each person who rates.

### Reading the table

| Column   | Meaning                                                |
|----------|--------------------------------------------------------|
| KPI      | One requirement of your position, with its short code. |
| Category | <b>Behavioural, Functional or Leadership.</b>          |
| Requires | The level your position needs on that KPI.             |

**Self, Line Mgr, Reporting Mgr, Skip level, Peer, HR**

The rating each person gave. A number shown in orange is **below the level required**.

## Doing your part

When the form is with you for your self-assessment:

1. Rate yourself on **every KPI**, and click **Save ratings** as you go. Nothing is lost if you stop and come back.
2. List your **key tasks** for the period, rate your achievement on each, and attach any files that show the work.
3. Click **Submit to line manager**. Your line manager comments and the form **comes back to you**.
4. Read the comments. You can answer and send it back for further discussion, or move it on to the next person.

Other raters see the same form and fill in **their own column**. A **peer** rates the KPIs only, never your key tasks. The form then moves on to your reporting manager, skip-level manager and HR, and ends *Completed*.

## Key tasks for a new joiner

When someone joins, their line manager and they agree their **initial key tasks** together. **Key Tasks** (Home group) is where that happens. It works as a conversation: **the manager proposes, the new joiner responds, and it goes round until you both settle**.

**Key tasks**  
Agree a new joiner's initial key tasks with them — you propose, they respond, and it goes round until you both settle.

**Aadhy Shah**  
Team Lead - BIM (Bangalore) 5  
Line Manager drafts key tasks

**Rohan Desai**  
BIM Modeler  
Line Manager drafts key tasks **Your turn**

**Ganesh Yadav**  
BIM Modeler (Bangalore) 5  
Line Manager drafts key tasks **Your turn**

**Diya Agarwal**  
BIM Modeler (Bangalore) 10  
Line Manager drafts key tasks **Your turn**

**Team Lead - BIM (Bangalore) 5**  
Key tasks for Aadhy Shah

**What this position requires (for reference)**

| Requirement                         | Category    | Level              |
|-------------------------------------|-------------|--------------------|
| Collaboration & teamwork            | Behavioural | needs 3 Competent  |
| Documentation & standards adherence | Behavioural | needs 3 Competent  |
| Deliverable quality                 | Functional  | needs 4 Proficient |
| On-time delivery                    | Functional  | needs 4 Proficient |
| Communication effectiveness         | Leadership  | needs 3 Competent  |
| Team development & mentoring        | Leadership  | needs 3 Competent  |

**Key tasks**  
No key tasks yet.

*Key Tasks for a line manager. The joiners waiting are on the left; the tag **Your turn** means the next move is yours.*

- The **list on the left** shows every joiner whose key tasks involve you, with a tag for the current step, such as *Line Manager drafts key tasks*, and **Your turn** when it is waiting for you.
- The panel **What this position requires (for reference)** lists the KPIs of the joiner's seat with the level each needs, for example *needs 3 Competent* or *needs 4 Proficient*. Draft the key tasks with these in view.

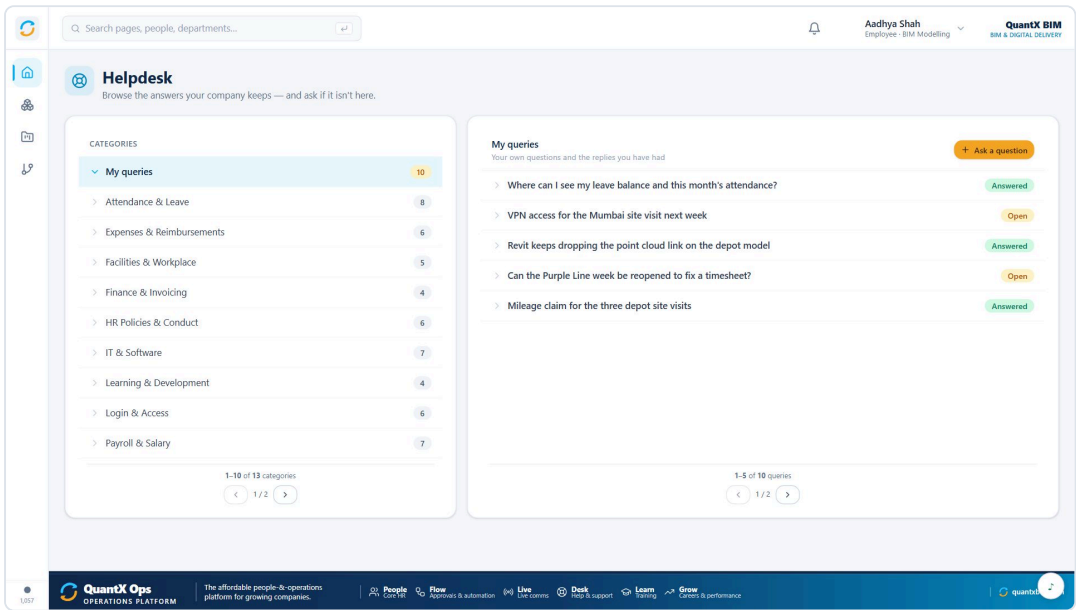
- The **Key tasks** panel below holds the agreed tasks. It reads *No key tasks yet* until the first draft is written.

The same request also appears in your **Approvals** inbox as *Key-task setup*, with the step it is on, such as *Line Manager drafts key tasks*.

Key tasks agreed in one cycle are assessed in the **next** appraisal, against the seat's KPIs, so what you agree now is what you are measured on later.

## 5. Helpdesk

**Helpdesk** (Home group) answers questions two ways: it keeps a **library of answers** your company has already written, and it lets you **ask** when yours is not there.



*Helpdesk. Categories on the left, either the published answers for one category or **My queries** on the right.*

### Reading the answers

The **Categories** list on the left is organised by subject, for example *Attendance & Leave*, *Expenses & Reimbursements*, *HR Policies & Conduct*, *IT & Software*, *Payroll & Salary*. The number beside each is how many answers it holds. There are more categories than fit on one page, so use the page controls under the list.

Click a category to see its questions, and click a question to read its answer. Many questions are answered here without anyone being asked.

### Asking a question

Click **Ask a question**. A short form opens:

| Field | What to do |
|-------|------------|
|-------|------------|

|                                      |                                                                                            |
|--------------------------------------|--------------------------------------------------------------------------------------------|
| <b>Subject</b>                       | Choose the category your question belongs to. Whoever looks after that subject will reply. |
| <b>Your question</b>                 | Required. Ask it in one line.                                                              |
| <b>Anything else that would help</b> | Optional detail: dates, amounts, what you already tried.                                   |

Click **Send**. The answer arrives **by email** and also stays under **My queries**, so you can find it again.

## My queries

**My queries** is the first item in the category list. It shows your own questions and the replies, each with a status:

| Status          | Meaning                                               |
|-----------------|-------------------------------------------------------|
| <b>Open</b>     | Asked, not yet answered.                              |
| <b>Answered</b> | A reply has been given. Open the question to read it. |

Questions that turn out to be common are added to the library by the administrators, so the more people ask, the less anyone has to.

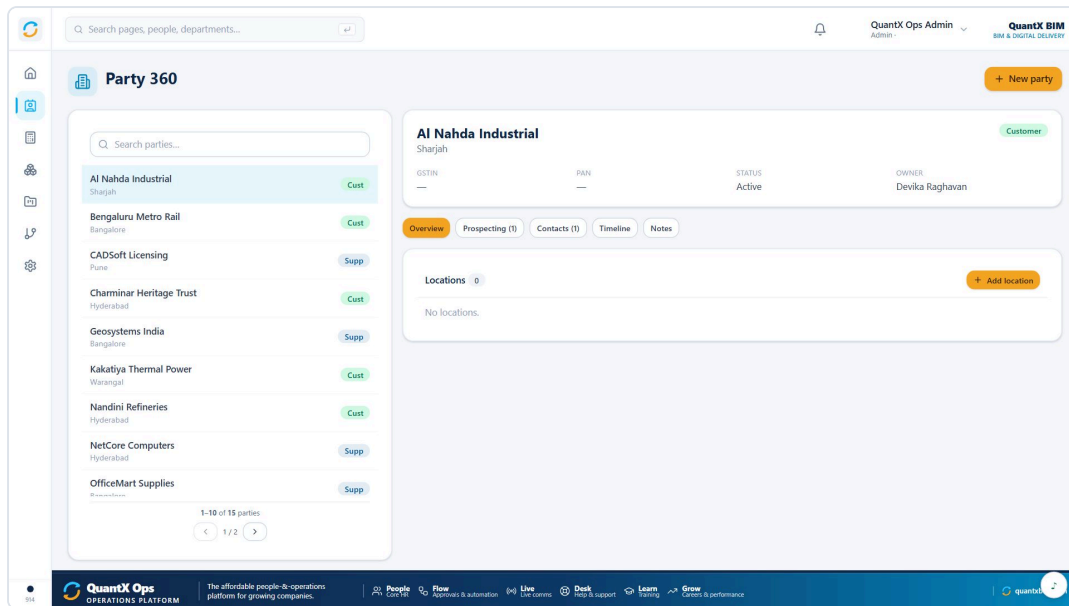
## 6. Customers and deals

Everything about selling lives in the **CRM** group. It follows one thread: a **party** (a customer or supplier), the **deals** you pursue with them, the **follow-ups** that keep each deal moving, and, once a deal is won, the **estimate** that costs it (chapter 7).

### Party 360

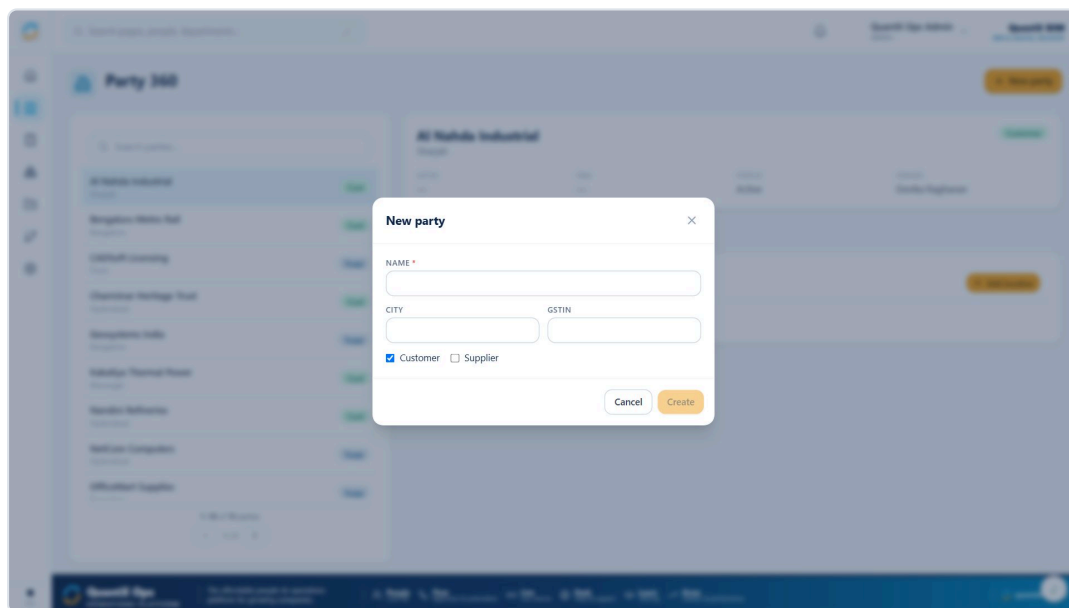
**Party 360** keeps everything about a customer or supplier on one screen. The list on the left shows each party with a tag (**Cust** for customer, **Supp** for supplier); type in the search box to filter. Click a party and the right side shows its detail:

- The header gives the name, city and role, with **GSTIN**, **PAN**, **Status** and **Owner**, the person in your company responsible for the relationship.
- The tabs **Overview**, **Prospecting**, **Contacts**, **Timeline** and **Notes** hold the rest. A number in brackets, such as *Contacts (1)*, is how many entries there are.
- **Locations** lists the party's sites. Click **Add location** to record another.



*Party 360. Customers and suppliers on the left, the selected party's record on the right.*

To add a party, click **New party** at the top right. Enter the **Name** (required), the **City** and the **GSTIN** if you have it, and tick **Customer**, **Supplier** or both. Click **Create**.



*The New party form. Only the name is required; the rest can be added later.*

Before creating a party, search for it: the same company entered twice splits its history in two. Administrators can merge duplicates (see the Administrator Guide).

## Client Locations

**Client Locations** lists every client site in one table, sorted by country, state and location, with the party it belongs to and how many contacts are recorded there. Each column has a filter box and sorts when you click its heading. A tag marks the **Main** location, and whether it is a *registered* office or a *site*. Click a party name to go straight to its record.

**Client Locations**  
Every client site, sorted by country, state and location

| COUNTRY | STATE       | LOCATION                                                       | CITY      | ZIP | PARTY                  | CONTACTS |
|---------|-------------|----------------------------------------------------------------|-----------|-----|------------------------|----------|
| India   | Karnataka   | Head Office <small>Main</small><br><small>registered</small>   | Bangalore | —   | Geosystems India       | 1        |
| India   | Karnataka   | Purple Line Depot <small>Main</small><br><small>site</small>   | Bangalore | —   | Bengaluru Metro Rail   | 1        |
| India   | Maharashtra | Formulation Block B<br><small>site</small>                     | Mumbai    | —   | Vaidya Lifesciences    | 0        |
| India   | Maharashtra | Head Office <small>Main</small><br><small>registered</small>   | Pune      | —   | CADSoft Licensing      | 1        |
| India   | Maharashtra | Head Office <small>Main</small><br><small>registered</small>   | Mumbai    | —   | Vaidya Lifesciences    | 1        |
| India   | Telangana   | CDU-3 Unit<br><small>site</small>                              | Hyderabad | —   | Nandini Refineries     | 1        |
| India   | Telangana   | Head Office <small>Main</small><br><small>registered</small>   | Hyderabad | —   | Nandini Refineries     | 1        |
| India   | Telangana   | Unit 5 Boiler House <small>Main</small><br><small>site</small> | Warangal  | —   | Kakatiya Thermal Power | 1        |

*Client Locations. Use the filters to find, for example, every site in one state.*

## Deals

A **deal** is a pursuit you log when a customer sends an RFQ. **Deals** lists them all with a **Code**, **Title**, **Party**, **Stage**, **Value** and **Status** (Open, Won or Lost). The second tab, **Win / loss**, summarises how you have done.

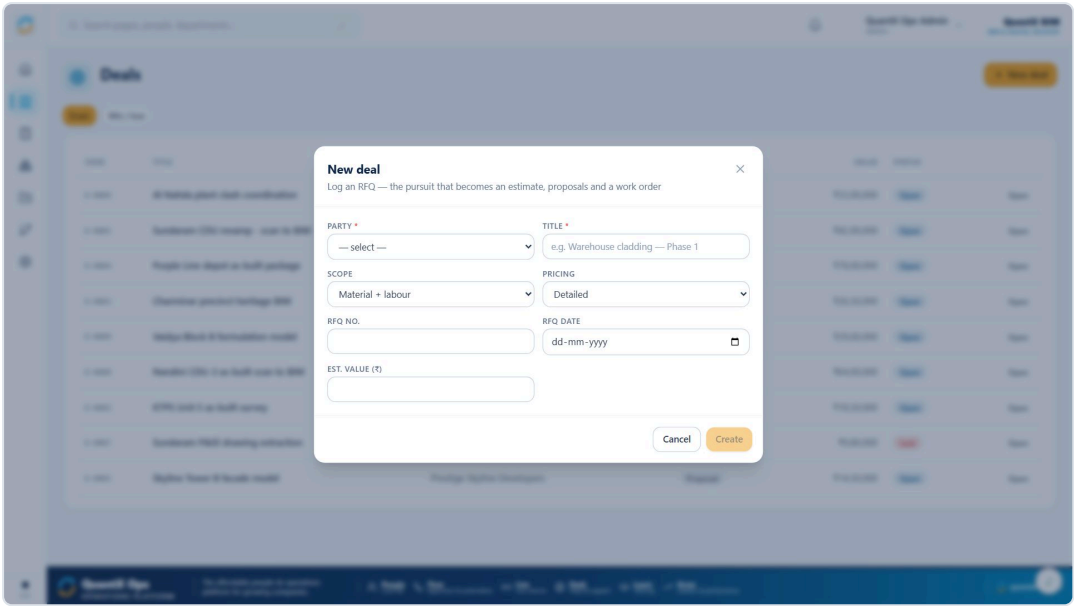
**Deals**

**Deals** **Win / loss** New deal

| CODE   | TITLE                              | PARTY                           | STAGE       | VALUE      | STATUS |
|--------|------------------------------------|---------------------------------|-------------|------------|--------|
| D-0006 | AI Nahda plant clash coordination  | AI Nahda Industrial             | Negotiation | ₹33,00,000 | Open   |
| D-0003 | Sundaram CDU revamp - scan to BIM  | Sundaram Petrochem Ltd          | Suspect     | ₹42,00,000 | Open   |
| D-0004 | Purple Line depot as-built package | Bengaluru Metro Rail            | Proposal    | ₹78,00,000 | Open   |
| D-0003 | Charminar precinct heritage BIM    | Charminar Heritage Trust        | Qualified   | ₹26,50,000 | Open   |
| D-0009 | Vaidya Block B formulation model   | Vaidya Lifesciences             | Proposal    | ₹29,00,000 | Open   |
| D-0008 | Nandini CDU-3 as-built scan to BIM | Nandini Refineries              | Proposal    | ₹64,00,000 | Open   |
| D-0002 | KTPS Unit 5 as-built survey        | Kakatiya Thermal Power          | Qualified   | ₹18,50,000 | Open   |
| D-0007 | Sundaram P&ID drawing extraction   | Sundaram Petrochemicals Limited | Closed Lost | ₹9,80,000  | Lost   |
| D-0005 | Skyline Tower B facade model       | Prestige Skyline Developers     | Proposal    | ₹14,50,000 | Open   |

*Deals. The **Stage** tracks how far along each is: Suspect, Qualified, Proposal, Negotiation and, at the end, Closed Won or Closed Lost.*

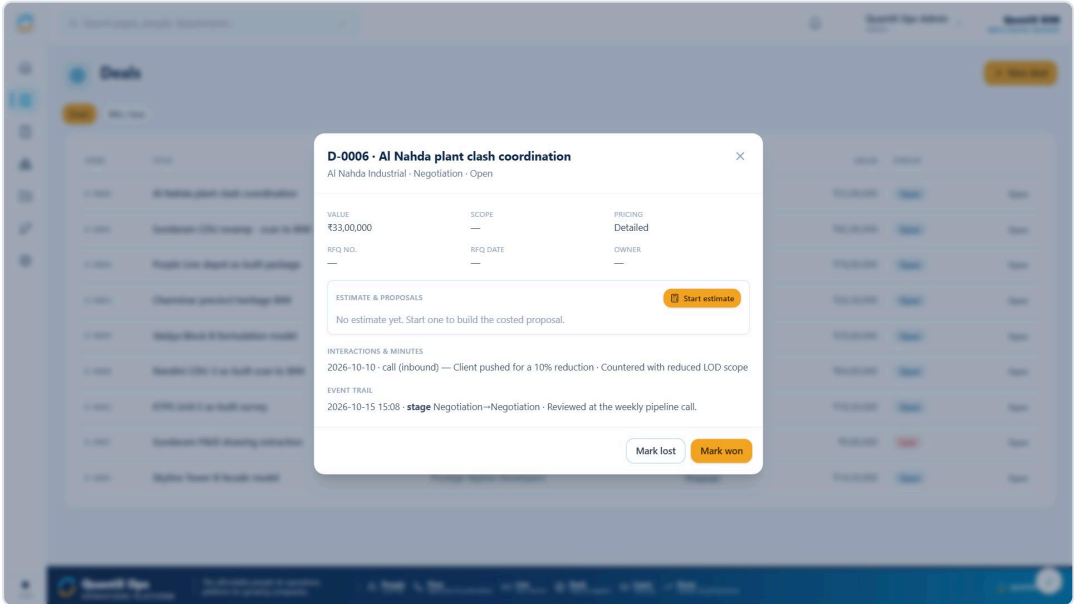
**To log a deal**, click **New deal**. The form reads *Log an RFQ — the pursuit that becomes an estimate, proposals and a work order.*



The New deal form.

| Field                | What to enter                                                                   |
|----------------------|---------------------------------------------------------------------------------|
| Party (required)     | Choose the customer.                                                            |
| Title (required)     | A name people will recognise, for example <i>Warehouse cladding — Phase 1</i> . |
| Scope                | What you are being asked to supply, for example <i>Material + labour</i> .      |
| Pricing              | How it will be priced, for example <i>Detailed</i> .                            |
| RFQ no. and RFQ date | The customer's own reference and date.                                          |
| Est. value (₹)       | Your estimate of the deal's worth, used for the pipeline totals.                |

Click a deal to open it. The panel shows its value, scope, pricing, RFQ details and owner, the **Estimate & proposals** section, the **Interactions & minutes** you have recorded (calls, emails, meetings) and the **Event trail** of every stage change.

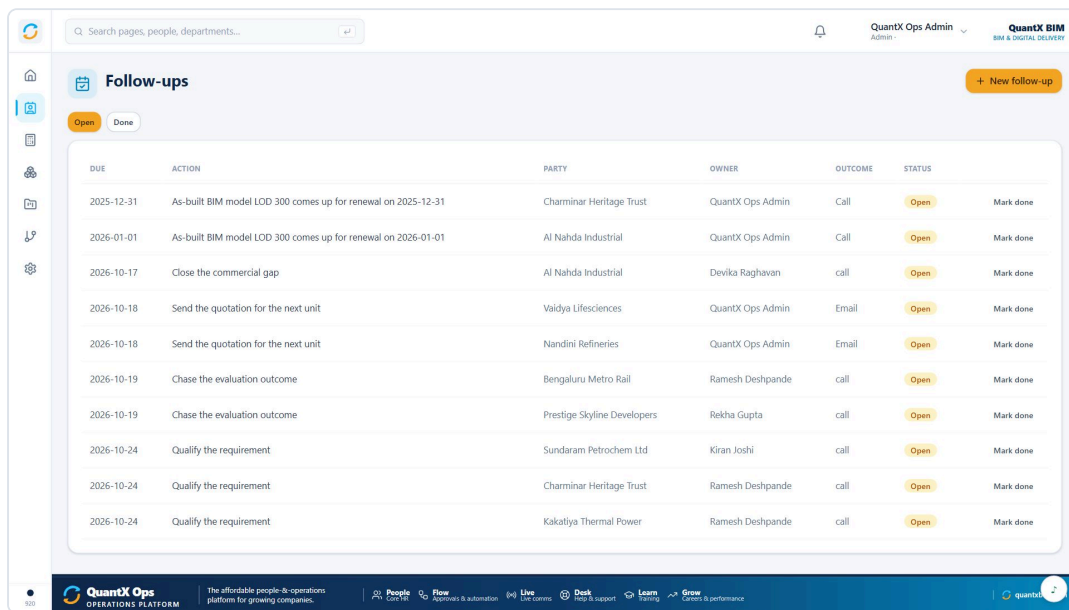


An open deal. **Start estimate** begins the costed estimate; **Mark won** and **Mark lost** close the deal.

- **Start estimate** creates the costed estimate for this deal. A won deal then becomes a work order (chapter 7).
- **Mark won** or **Mark lost** closes the deal. The outcome feeds the **Win / loss** tab.

## Follow-ups

A deal moves because somebody does the next thing. **Follow-ups** is the list of those next things, with the date **Due**, the **Action**, the **Party**, the **Owner**, the **Outcome** (a call, an email) and the **Status**. The tabs **Open** and **Done** separate what is outstanding from what is finished.



| DUE        | ACTION                                                        | PARTY                       | OWNER            | OUTCOME | STATUS |
|------------|---------------------------------------------------------------|-----------------------------|------------------|---------|--------|
| 2025-12-31 | As-built BIM model LOD 300 comes up for renewal on 2025-12-31 | Charminar Heritage Trust    | QuantX Ops Admin | Call    | Open   |
| 2026-01-01 | As-built BIM model LOD 300 comes up for renewal on 2026-01-01 | Al Nahda Industrial         | QuantX Ops Admin | Call    | Open   |
| 2026-10-17 | Close the commercial gap                                      | Al Nahda Industrial         | Devika Raghavan  | call    | Open   |
| 2026-10-18 | Send the quotation for the next unit                          | Vaidya Lifesciences         | QuantX Ops Admin | Email   | Open   |
| 2026-10-18 | Send the quotation for the next unit                          | Nandini Refineries          | QuantX Ops Admin | Email   | Open   |
| 2026-10-19 | Chase the evaluation outcome                                  | Bengaluru Metro Rail        | Ramesh Deshpande | call    | Open   |
| 2026-10-19 | Chase the evaluation outcome                                  | Prestige Skyline Developers | Rekha Gupta      | call    | Open   |
| 2026-10-24 | Qualify the requirement                                       | Sundaram Petrochem Ltd      | Kiran Joshi      | call    | Open   |
| 2026-10-24 | Qualify the requirement                                       | Charminar Heritage Trust    | Ramesh Deshpande | call    | Open   |
| 2026-10-24 | Qualify the requirement                                       | Kakatiya Thermal Power      | Ramesh Deshpande | call    | Open   |

*Follow-ups. Click **Mark done** at the end of a row when you have done it and record what happened.*

Click **New follow-up** to add one. Dated follow-ups also appear when a contract is coming up for **renewal**, so a renewal is never forgotten.

## Prospecting

**Prospecting** is the view of *what we are chasing, and what has gone quiet*. Three tabs:

| Tab             | Shows                                                                                                                                                                           |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>My book</b>  | The parties you own: their live targets, the pipeline value, the next action and how long since your <b>last touch</b> (a red <i>never</i> means no contact has been recorded). |
| <b>Team</b>     | A manager's roll-up: one row per person who reports to you, with totals only. To see a party's detail you open it from <b>My book</b> , subject to your own access.             |
| <b>Coverage</b> | The <i>white space</i> : which of your offerings a customer segment has never been asked for.                                                                                   |

Use the two filters under the search box to narrow to what you want, and the totals line (parties, pipeline, actions due) to see where to start.

**Prospecting**  
What we are chasing, and what has gone quiet

Search parties...

Everything I can see

Any activity

15 parties pipeline ₹5,00,000 6 actions due

| PARTY                                                 | OWNER            | LIVE TARGETS | PIPELINE  | NEXT ACTION | LAST TOUCH |
|-------------------------------------------------------|------------------|--------------|-----------|-------------|------------|
| Bengaluru Metro Rail<br>Bangalore - Tier standard     | Ramesh Deshpande | 1 / 1        | ₹5,00,000 | 2026-10-19  | 7d         |
| Al Nahda Industrial<br>Sharjah - Tier standard        | Devika Raghavan  | 0 / 1        | —         | 2026-01-01  | 7d         |
| CADSoft Licensing<br>Pune - Tier standard             | Rakha Gupta      | 0 / 0        | —         | —           | never      |
| Charminar Heritage Trust<br>Hyderabad - Tier standard | Ramesh Deshpande | 0 / 1        | —         | 2025-12-31  | 7d         |
| Geosystems India<br>Bangalore - Tier standard         | Kiran Joshi      | 0 / 0        | —         | —           | never      |
| Kakatiya Thermal Power<br>Warangal - Tier standard    | Ramesh Deshpande | 0 / 0        | —         | 2026-10-24  | 7d         |

*Prospecting, My book. Parties that have never been touched are the easiest wins to find.*

## Campaigns and WhatsApp

**Campaigns** lets you write to an **audience** with a **template**. The list shows each campaign's audience, **Status** (Draft until sent), and the counts of **Recipients**, **Sent** and **Suppressed**, the last being people left out because they asked not to be contacted. Click **New campaign** to start one, **Review** to check it before it goes, or **Cancel** to stop it.

**Campaigns**  
Who you are writing to, and what you are sending them

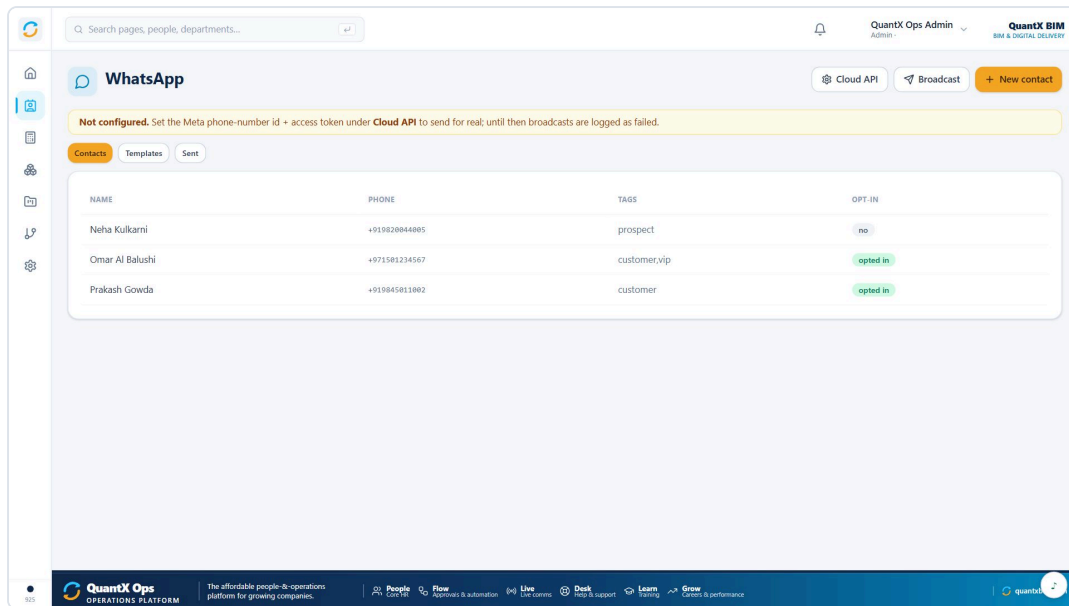
Campaigns Audiences Templates

+ New campaign

| CAMPAIGN                                                                                            | AUDIENCE                         | STATUS | RECIPIENTS | SENT | SUPPRESSED |               |
|-----------------------------------------------------------------------------------------------------|----------------------------------|--------|------------|------|------------|---------------|
| Refinery as-built - Q3 introduction<br>As-built models from your existing plant, without a shutdown | Oil & gas prospects, South India | Draft  | 0          | 0    | 0          | Review Cancel |

*Campaigns. The tabs **Audiences** and **Templates** hold who you write to and what you say.*

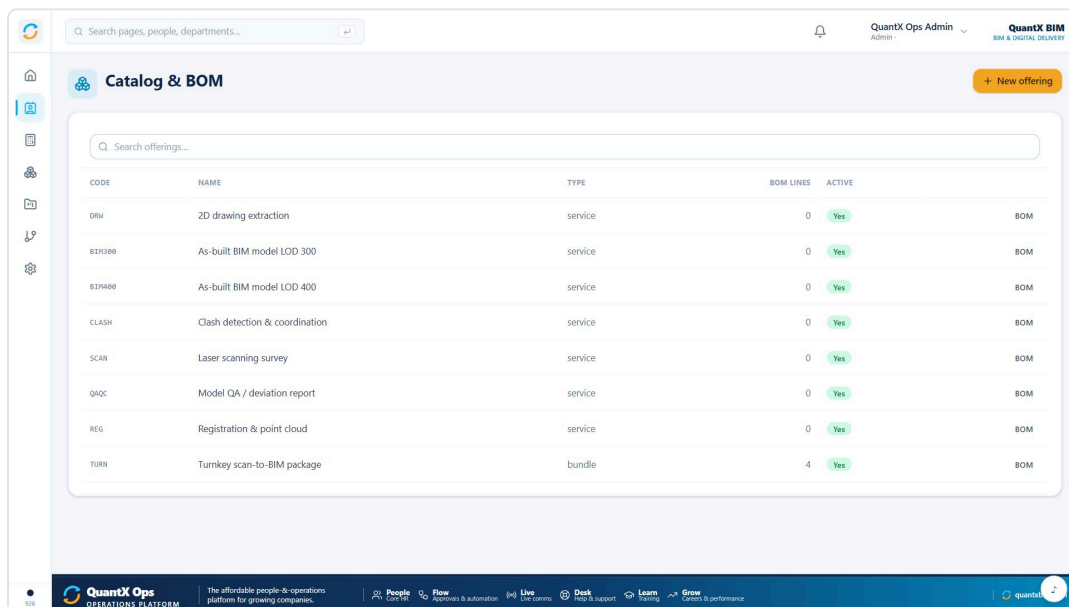
**WhatsApp** keeps your contacts, templates and sent messages for WhatsApp. Only contacts who have **opted in** can be messaged. If your company has not yet connected the WhatsApp Cloud API, a notice at the top says so, and any broadcast is recorded as *failed* instead of being sent.



WhatsApp contacts and their opt-in. The yellow notice appears until your administrator connects WhatsApp.

## Catalog and BOM

**Catalog & BOM** lists what you sell: each **offering** has a code, a name, a **type** (a *service*, or a *bundle* of several) and, for bundles, its **BOM lines**: the parts it is made of. Use it to see what you can quote; your administrator maintains it.



Catalog & BOM. A bundle such as the turnkey package lists the four lines it is built from.

## 7. From estimate to project

When a deal is worth pursuing, the **Deliver** group takes it the rest of the way: a costed **estimate**, one or more **proposals** to the customer, a **work order** when a proposal is accepted, and a **project** that the team

delivers and bills. Each step is built from the one before, so nothing is retyped.

## Estimates

**Estimates** lists every costed estimate with its **number**, **name**, **client**, **scope** and **value**. Three tabs sit at the top: **Estimates**, **Proposals** and **Work orders (margin)**. Click **New estimate** to start one, or **Start estimate** from inside a deal (chapter 6).

| ESTIMATE NO. | NAME                                                      | CLIENT                      | SCOPE             | ESTIMATE (PO VALUE) |      |
|--------------|-----------------------------------------------------------|-----------------------------|-------------------|---------------------|------|
| EST-0088     | AI Nahda plant clash coordination <span>In process</span> | AI Nahda Industrial         | Material + labour | ₹5,96,000           | Open |
| EST-0087     | Skyline Tower B facade model <span>In process</span>      | Prestige Skyline Developers | Material + labour | ₹4,46,250           | Open |
| EST-0086     | KTPS Unit 5 as-built survey <span>In process</span>       | Kakatiya Thermal Power      | Material + labour | ₹9,29,000           | Open |
| EST-0085     | Sundaram CDU revamp - scan to BIM <span>In process</span> | Sundaram Petrochem Ltd      | Material + labour | ₹6,52,000           | Open |
| EST-0084     | Charminar precinct heritage BIM <span>In process</span>   | Charminar Heritage Trust    | Material + labour | ₹5,68,000           | Open |

*Estimates. "In process" means still being built; the value is the total proposed to the client.*

Click **Open** on an estimate to build it. An estimate is a tree: **sections** hold **tasks**, and each task is costed from **material** and **labour** lines, a quantity multiplied by a rate, rolling up into the section and the total at the top.

| EST-0008 · AI Nahda plant clash coordination                                |                                             | Back          |  | Submit as proposal |   | + Add section                                     |  |
|-----------------------------------------------------------------------------|---------------------------------------------|---------------|--|--------------------|---|---------------------------------------------------|--|
| In process · AI Nahda Industrial · Hyderabad · Material + labour · detailed |                                             |               |  |                    |   | Estimate total — the value proposed to the client |  |
|                                                                             |                                             |               |  |                    |   | ₹5,96,000                                         |  |
| 1                                                                           | Field data capture                          |               |  | ₹51,000            | + |                                                   |  |
| +                                                                           | 1.1 Site setup & mobilisation               | own ₹8,850    |  | ₹8,850             | + |                                                   |  |
| +                                                                           | 1.2 Laser scanning                          | own ₹20,400   |  | ₹20,400            | + |                                                   |  |
| +                                                                           | 1.3 Control survey                          | own ₹21,750   |  | ₹21,750            | + |                                                   |  |
| 2                                                                           | Registration & pre-processing               |               |  | ₹56,000            | + |                                                   |  |
| +                                                                           | 2.1 Point-cloud registration                | own ₹25,500   |  | ₹25,500            | + |                                                   |  |
| +                                                                           | 2.2 Noise clean-up & decimation             | own ₹30,500   |  | ₹30,500            | + |                                                   |  |
| 3                                                                           | BIM modelling                               |               |  | ₹4,62,000          | + |                                                   |  |
| +                                                                           | 3.1 Primary / structural model              | own ₹1,75,500 |  | ₹1,75,500          | + |                                                   |  |
| +                                                                           | 3.2 Secondary systems model (MEP / process) | own ₹1,28,750 |  | ₹1,28,750          | + |                                                   |  |
| +                                                                           | 3.3 Model federation & QA                   | own ₹1,57,750 |  | ₹1,57,750          | + |                                                   |  |
| 4                                                                           | Deliverables & QA                           |               |  | ₹27,000            | + |                                                   |  |
| +                                                                           | 4.1 Clash review & coordination             | own ₹9,600    |  | ₹9,600             | + |                                                   |  |

*An estimate built from the bottom up. The total at the top, "the value proposed to the client", is the sum of the lines below.*

The icons at the end of each row add what that row needs:

| Icon      | Adds or does                                                   |
|-----------|----------------------------------------------------------------|
| +         | Adds a sub-item under this row.                                |
| Cube      | Adds a <b>material</b> line.                                   |
| Spanner   | Adds a <b>labour</b> line.                                     |
| Paperclip | Attaches a <b>file</b> , for example a drawing or a quotation. |
| Pencil    | Edits the row.                                                 |
| Bin       | Removes it.                                                    |

Use **Add section** at the top right to add another top-level section. When the estimate is ready, click **Submit as proposal**.

## Proposals

A **proposal** is the estimate as sent to the customer. The **Proposals** tab lists each one with its estimate number and revision (for example *EST-0005-2 #2*), project, client, value, the date **Sent**, and its **Status**:

| Status            | What it means                 | What you can do                                                          |
|-------------------|-------------------------------|--------------------------------------------------------------------------|
| <b>Sent</b>       | With the customer.            | <b>Review</b> it.                                                        |
| <b>Accepted</b>   | The customer said yes.        | → <b>work order</b> opens the work order that was created automatically. |
| <b>Rejected</b>   | The customer said no.         | <b>Re-estimate</b> to revise and send again.                             |
| <b>Superseded</b> | A newer revision replaced it. | <b>Review</b> only.                                                      |

The screenshot shows the 'Estimates' tab in the QuantX Ops Admin interface. The interface includes a search bar at the top, a sidebar with navigation icons, and a main content area displaying a table of proposals. The table has columns for PROPOSAL, PROJECT, CLIENT, PO VALUE, SENT, and STATUS. The status column includes a 'Review' button for each row. The proposals are listed in descending order of PO VALUE.

| PROPOSAL      | PROJECT                                    | CLIENT                      | PO VALUE   | SENT       | STATUS     |
|---------------|--------------------------------------------|-----------------------------|------------|------------|------------|
| EST-0005-2 #2 | Sundaram CDU revamp - scan to BIM          | Sundaram Petrochem Ltd      | ₹6,52,000  | 2026-10-15 | Sent       |
| EST-0004-2 #2 | Charminar precinct heritage BIM            | Charminar Heritage Trust    | ₹5,68,000  | 2026-10-15 | Sent       |
| EST-0008-1 #1 | Al Nahda plant clash coordination          | Al Nahda Industrial         | ₹5,96,000  | 2026-10-15 | Sent       |
| EST-0007-1 #1 | Skyline Tower B facade model               | Prestige Skyline Developers | ₹4,46,250  | 2026-10-15 | Sent       |
| EST-0006-1 #1 | KTPS Unit 5 as-built survey                | Kakatiya Thermal Power      | ₹9,29,000  | 2026-10-15 | Sent       |
| EST-0005-1 #1 | Sundaram CDU revamp - scan to BIM          | Sundaram Petrochem Ltd      | ₹6,52,000  | 2026-10-15 | Superseded |
| EST-0004-1 #1 | Charminar precinct heritage BIM            | Charminar Heritage Trust    | ₹5,68,000  | 2026-10-15 | Rejected   |
| EST-0003-1 #1 | Purple Line depot as-built package WO-0003 | Bengaluru Metro Rail        | ₹59,49,000 | 2026-10-15 | Accepted   |
| EST-0002-1 #1 | Vaidya Block B formulation model WO-0002   | Vaidya Lifesciences         | ₹4,97,000  | 2026-10-15 | Accepted   |
| EST-0001-1 #1 | Nandini CDU-3 as-built scan to BIM WO-0001 | Nandini Refineries          | ₹9,94,000  | 2026-10-15 | Accepted   |

*Proposals. Accepting a proposal creates the work order by itself: there is no separate "convert" step.*

## Work orders

Accepting a proposal creates a **work order**: the commitment to deliver. **Work Orders** shows each one against its estimate, and the tab **Work orders (margin)** inside Estimates compares what was priced with what it is costing, so the margin is visible while the work is under way. Each work order becomes a **project** in Deliver.

## Projects

**Projects** (in the **Deliver** group) lists every project with its code, name, customer, **Health** (on track, at risk or delayed), percent complete and billable value. The figures across the top total projects, billable value and cost budget, and how many are on track or at risk. Click **Open** to see one.

| CODE    | NAME                               | CUSTOMER             | HEALTH  | %   | BILLABLE   |      |
|---------|------------------------------------|----------------------|---------|-----|------------|------|
| MO-0003 | Purple Line depot as-built package | Bengaluru Metro Rail | Delayed | 22% | ₹59,49,000 | Open |
| MO-0002 | Vaidya Block B formulation model   | Vaidya Lifesciences  | Delayed | 35% | ₹4,97,000  | Open |
| MO-0001 | Nandini CDU-3 as-built scan to BIM | Nandini Refineries   | Delayed | 41% | ₹9,94,000  | Open |

*Deliver. The Health column flags the projects that need attention first.*

A project opens as a panel with five tabs: **Plan**, **Team**, **Billing**, **Gates** and **Timesheet**.

**PRJ-0003 - Purple Line depot as-built package**  
Bengaluru Metro Rail - PM: Devika Sundaram - Bangalore - Active

Execution plan — a copy of the estimate. Edits here never touch the estimate or the accepted proposal.

Schedule 2026-07-20 → 2026-12-29 - 113 working days

| MATERIAL  | LABOUR     | MISC | PLANNED TOTAL | PLANNED EFFORT |
|-----------|------------|------|---------------|----------------|
| ₹4,36,000 | ₹55,13,000 | ₹0   | ₹59,49,000    | 0 h            |

Baseline frozen 2026-10-14 - total ₹59,49,000

Overview | List | Gantt & charts | Materials | Cost & margin

Active | Delayed | 2026-07-20 → 2026-12-29

| PROGRESS | CONTRACT VALUE | ACTUAL COST | MARGIN             |
|----------|----------------|-------------|--------------------|
| 21.8%    | ₹59,49,000     | ₹7,41,937   | ₹52,07,063 (87.5%) |

SPI 0.43 CPI 1.75 PV ₹30,45,741 - EV ₹12,94,389 - AC ₹7,41,937 Forecast (EAC) ₹33,99,429 5 overdue

| COST BUCKET     | PLANNED    | ACTUAL    |
|-----------------|------------|-----------|
| Material        | ₹4,36,000  | ₹51,000   |
| Labour          | ₹55,13,000 | ₹6,90,937 |
| Misc / expenses | ₹0         | ₹0        |
| Total           | ₹59,49,000 | ₹7,41,937 |

Close | Edit project | Status report | Work order | Put on hold

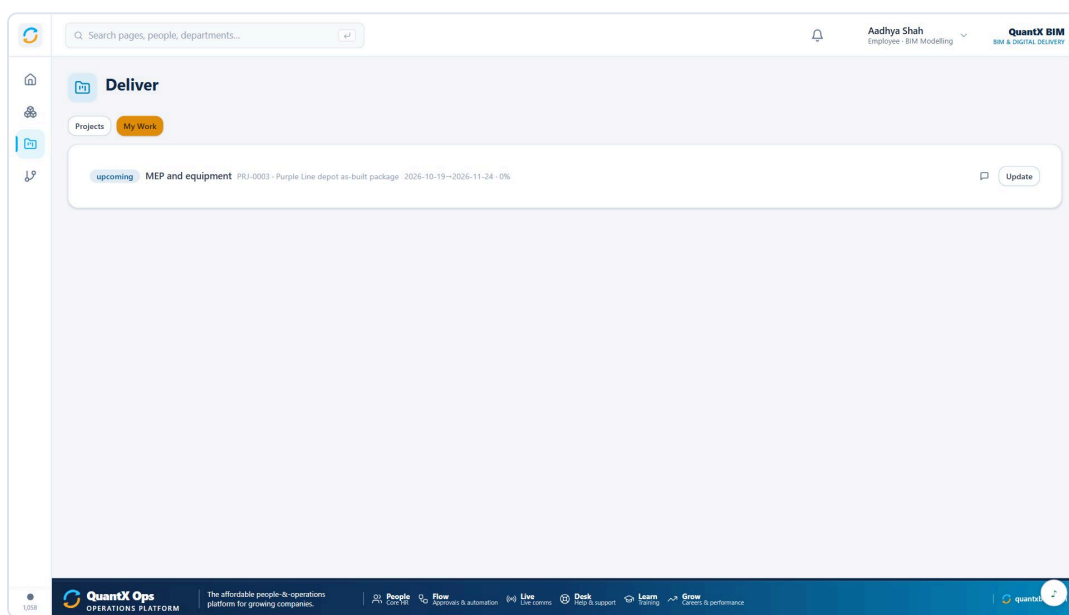
A project. The execution plan is a **copy** of the estimate: changing it never touches the estimate or the accepted proposal.

- **Plan.** The schedule and cost of the work. **Overview** shows progress, contract value, actual cost and margin, the schedule and cost indices (**SPI** and **CPI**), the forecast cost at completion, and a table of planned against actual for **Material**, **Labour** and **Misc / expenses**. The other views are **List**, **Gantt & charts**, **Materials** and **Cost & margin**. **Auto-schedule** works out the dates from the task order, and **Baseline dates** and **Re-baseline cost** freeze the plan so later slippage is measured against it.
- **Team.** Who is working on it, as people and groups.
- **Billing.** The milestones you will invoice, and what has been invoiced.
- **Gates.** Review points where the project is checked before it moves on.
- **Timesheet.** The hours people have recorded against its tasks. Click **Log time** to add yours: pick the **task**, the **date**, the **hours** and a **note**.

At the bottom: **Edit project**, **Status report** (a printable summary), **Work order**, **Put on hold**, and **Mark complete** at the top right of the overview.

## My Work

If you are given tasks on a project, you do not need to open the whole plan. **My Work** is the second tab on the **Deliver** screen, and lists only **your** tasks, each with its project, its dates and its progress.



*My Work for one employee. A tag shows whether the task is upcoming, in progress or overdue.*

Click **Update** on a task to set its % **complete** and its **status**: *Not started*, *In progress*, *Blocked* or *Done*. Use the speech-bubble icon to leave a **remark** for the project manager. The percentage rolls up into the project's progress, so keeping it current keeps the project's health honest.

## 8. Material: buying, receiving and moving stock

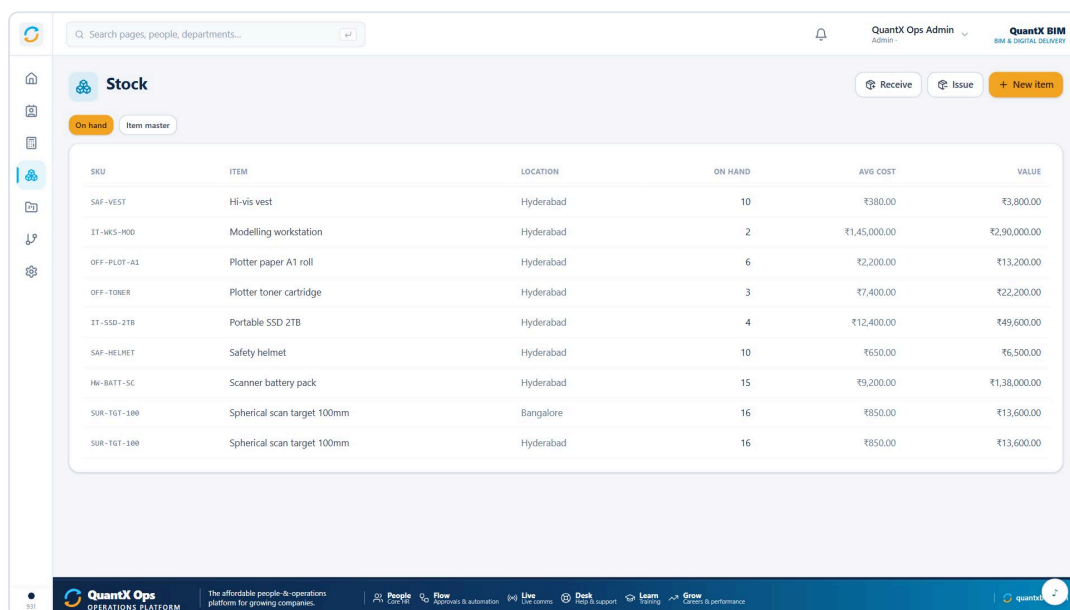
The **Stock** group covers everything that happens to material: what you hold, what you need to buy, what arrives, what moves between stores, what goes back, and what is corrected after a count. Every movement is recorded once and flows to Accounting by itself.

### Stock

**Stock** opens on **On hand**: one row per item per store, with its **SKU**, **Item**, **Location**, the quantity **On hand**, the **Avg cost** and the **Value**. Cost is a moving average, so the value always reflects what the stock actually cost.

The second tab, **Item master**, lists the items themselves. Three buttons sit at the top right:

| Button          | Use it to                                                    |
|-----------------|--------------------------------------------------------------|
| <b>Receive</b>  | Record goods arriving into a store.                          |
| <b>Issue</b>    | Release material from a store, to a project or a department. |
| <b>New item</b> | Add a new item to the master.                                |



The screenshot shows the 'Stock' page in the QuantX Ops Admin interface. The 'On hand' tab is selected, displaying a table with the following data:

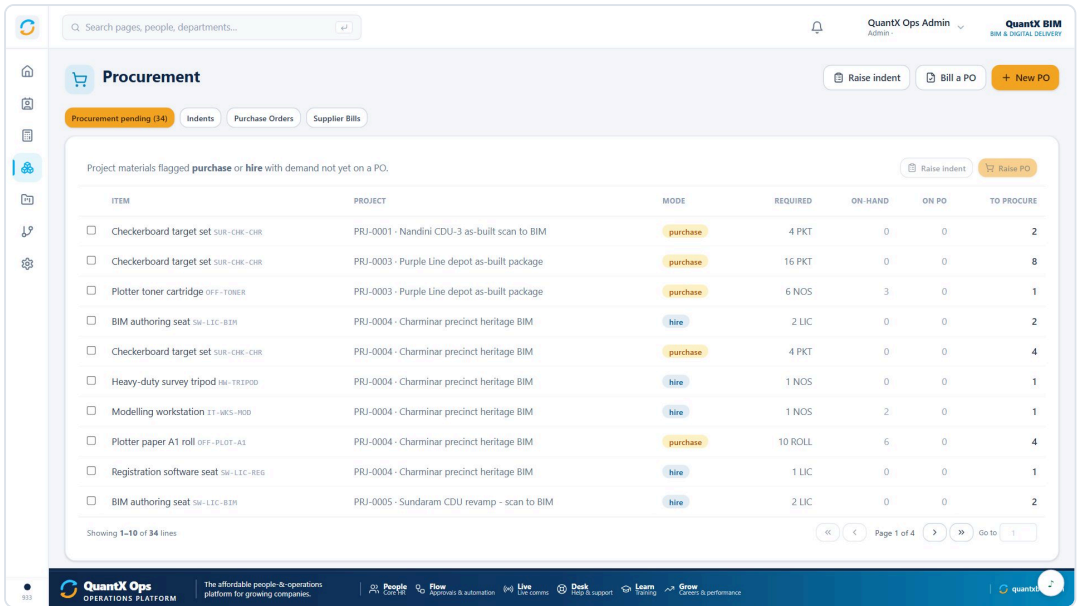
| SKU         | ITEM                        | LOCATION  | ON HAND | AVG COST     | VALUE        |
|-------------|-----------------------------|-----------|---------|--------------|--------------|
| SAF-VEST    | Hi-vis vest                 | Hyderabad | 10      | ₹380.00      | ₹3,800.00    |
| IT-WKS-HDD  | Modelling workstation       | Hyderabad | 2       | ₹1,45,000.00 | ₹2,90,000.00 |
| OFF-PLOT-A1 | Plotter paper A1 roll       | Hyderabad | 6       | ₹2,200.00    | ₹13,200.00   |
| OFF-TONER   | Plotter toner cartridge     | Hyderabad | 3       | ₹7,400.00    | ₹22,200.00   |
| IT-SSD-2TB  | Portable SSD 2TB            | Hyderabad | 4       | ₹12,400.00   | ₹49,600.00   |
| SAF-HELMET  | Safety helmet               | Hyderabad | 10      | ₹650.00      | ₹6,500.00    |
| HW-BATT-SC  | Scanner battery pack        | Hyderabad | 15      | ₹9,200.00    | ₹1,38,000.00 |
| SUR-TGT-180 | Spherical scan target 100mm | Bangalore | 16      | ₹850.00      | ₹13,600.00   |
| SUR-TGT-180 | Spherical scan target 100mm | Hyderabad | 16      | ₹850.00      | ₹13,600.00   |

*Stock on hand. The same item can be held in several stores; each is its own row.*

Receiving against a purchase order checks what arrived against what was ordered. Issuing to a project charges the cost to that project, so the project's actual cost is always current.

### Procurement

**Procurement** takes you from "we need this" to "it is bought". It has four tabs: **Procurement pending**, **Indents**, **Purchase Orders** and **Supplier Bills**.

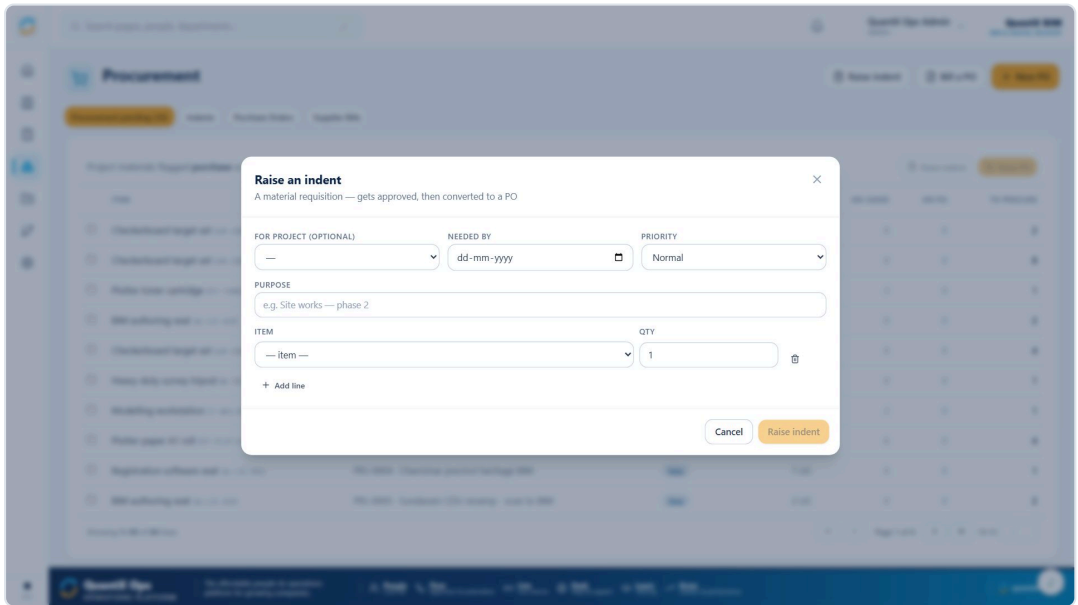


Procurement pending. Each row is a project material flagged **purchase** or **hire** whose demand is not yet on a purchase order.

**Procurement pending** is the starting list. It shows project materials flagged **purchase** or **hire** that nobody has ordered yet: the **Item**, the **Project**, the **Mode**, how much is **Required**, how much is **On-hand**, how much is already **On PO**, and what is still **To procure**. Tick the rows you want, then use **Raise indent** or **Raise PO** at the top right of the list.

Raising an indent

An **indent** is a material requisition: a request to buy that gets approved and is then converted to a purchase order. Click **Raise indent**.



The indent form. It is approved first, then turned into a PO.

| Field | What to enter |
|-------|---------------|
|-------|---------------|

|                               |                                                                |
|-------------------------------|----------------------------------------------------------------|
| <b>For project</b> (optional) | The project the material is for, so its cost is charged there. |
| <b>Needed by</b>              | The date you need it on site.                                  |
| <b>Priority</b>               | How urgent it is; <i>Normal</i> by default.                    |
| <b>Purpose</b>                | A short reason, for example <i>Site works — phase 2</i> .      |
| <b>Item and Qty</b>           | What and how many. Click <b>Add line</b> for more items.       |

Click **Raise indent**. It goes for approval; you can follow it in **Indents**.

## Purchase orders

A **purchase order** is a commitment to a supplier. Click **New PO**, or convert an approved indent.

The purchase order form. It records the commitment only: nothing is posted to the accounts until the goods are received.

| Field                         | What to enter                                                      |
|-------------------------------|--------------------------------------------------------------------|
| <b>Supplier</b> (required)    | The supplier.                                                      |
| <b>Deliver to store</b>       | Where the goods should arrive.                                     |
| <b>Item, Qty, Rate, GST %</b> | One line per item. The total is shown on the <b>Create</b> button. |

A purchase order must be **approved** before goods can be received against it. When goods arrive, **receive** them in Stock; when the supplier's invoice comes, record it under **Supplier Bills** (or **Bill a PO**), which compares the bill with the order and the receipt before it is accepted.

## Transfers

**Transfers** moves stock from one store to another, for example from Hyderabad to Bangalore. The list shows each transfer's number, its **From** and **To** stores, how many lines it has and its **Status**. A transfer is

*dispatched* from one store and *received* at the other, so goods in transit are never counted twice. Click **New transfer** to start one.

| NO.      | STATUS   | FROM      | TO        | LINES | STATUS   |
|----------|----------|-----------|-----------|-------|----------|
| TRF-0001 | Received | Hyderabad | Bangalore | 3     | Received |

*A transfer, received at the destination.*

Returns

**Returns** records goods that go back: **Return to supplier** for goods you send back, and **Client rejection** for a delivery a client turned away. Tabs split **All**, **To supplier** and **From client**. Each return shows its date, the party, the store, the lines, the value and the **reason**.

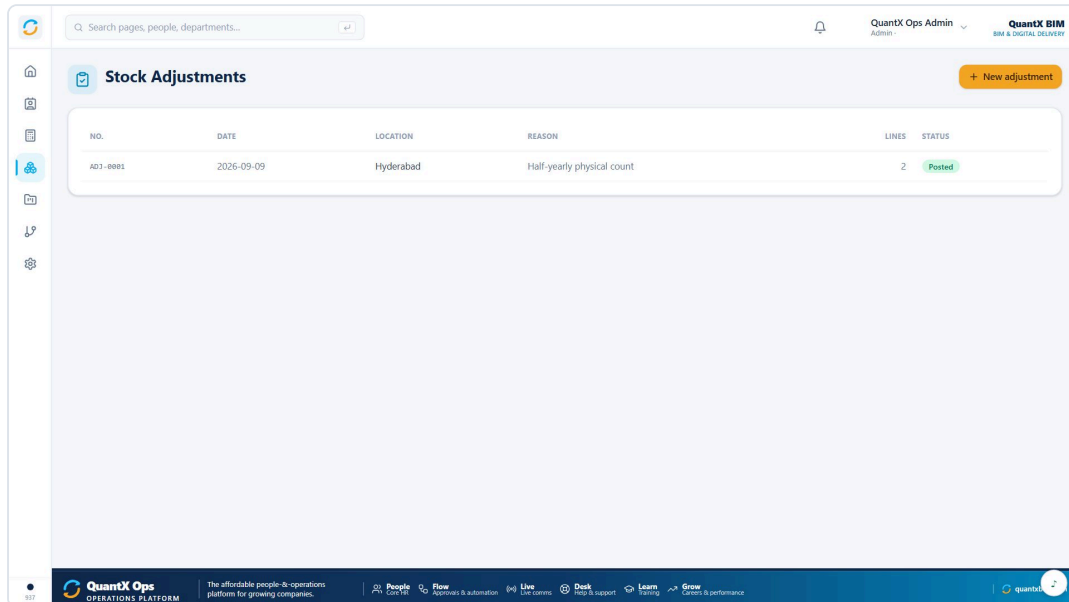
| NO.      | DIRECTION   | DATE       | PARTY                | STORE     | LINES | VALUE   | REASON                                                 |
|----------|-------------|------------|----------------------|-----------|-------|---------|--------------------------------------------------------|
| RET-0002 | To supplier | 2026-09-15 | Geosystems India     | Hyderabad | 1     | ₹18,400 | E33 damaged battery packs returned to Geosystems India |
| RET-0001 | To supplier | 2026-09-15 | SurVtech Instruments | Hyderabad | 1     | ₹18,500 | E33 defective tripod returned to SurVtech Instruments  |

*Returns. These record the goods. What is owed either way is settled separately, with a debit note to the supplier or a credit note to the client.*

That separation is deliberate: a stores entry should never decide a commercial question. The note that settles the money is raised in Accounting.

## Adjustments

**Adjustments** corrects stock after a physical count, a loss or damage. Each adjustment has a date, a **location**, a **reason** (for example *Half-yearly physical count*), the number of lines and a **status**. Click **New adjustment**, enter the counted quantity for each item, and post it: the difference is written to the stock record and to the accounts.



*A posted adjustment from a half-yearly count.*

Always give a clear reason. An adjustment changes the book value of stock, and the reason is what an auditor reads first.

## 9. Money: invoices, cash and reports

The **Accounting** group is where the money side of everything you have done is recorded and reported. You do not enter most of it by hand: stock receipts, issues, payroll and project billing post to the ledger on their own. What you do here is **bill**, **record cash in and out**, and **read** the results. Which screens you see depends on your role.

### Invoices

**Invoices** is *billed against customer POs, with the GST split on issue*. Three tiles at the top show what has been **Billed**, what has been **Received**, and what is **Outstanding** (with the overdue part). A banner reminds the project manager when project objectives have passed their date; it is a delivery signal only, because invoicing is always against the **work order**.

**Invoices**  
Billed against customer POs, with the GST split on issue

BILLED: ₹43,89,600.00  
RECEIVED: ₹43,89,600.00  
OUTSTANDING - OVERDUE: ₹-11,800.00

3 project objectives are past its date  
WO-0003, WO-0001, WO-0002 — a delivery signal for the project manager. Objectives do not bill anything; invoicing is against the work order.

Invoices (3) | Proformas (3) | Credit notes (2)

| NO.      | CUSTOMER             | AGAINST | DATE       | GST                    | TOTAL         | RECEIVED      | OUTSTANDING                    | STATUS |
|----------|----------------------|---------|------------|------------------------|---------------|---------------|--------------------------------|--------|
| INV-0002 | Vaidya Lifesciences  | WO-0002 | 2026-08-19 | IGST ₹44,730.00        | ₹2,93,230.00  | ₹2,93,230.00  | settled                        | Paid   |
| INV-0001 | Nandini Refineries   | WO-0001 | 2026-08-05 | CGST + SGST ₹89,460.00 | ₹5,86,460.00  | ₹5,86,460.00  | settled<br>₹11,800.00 credited | Paid   |
| INV-0003 | Bengaluru Metro Rail | WO-0003 | 2026-07-25 | IGST ₹5,35,410.00      | ₹35,09,910.00 | ₹35,09,910.00 | settled                        | Paid   |

*Invoices. Each row shows the customer, the work order it is **Against**, the GST charged, the total, the amount received and the status.*

The tabs are **Invoices**, **Proformas** and **Credit notes**. An invoice moves through these statuses:

| Status          | Meaning                                                                                                                                    |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Draft</b>    | Saved but not issued. You can still edit it.                                                                                               |
| <b>Issued</b>   | Issued and posted to the ledger. It stays <i>Issued</i> until it is paid in full; part payments only reduce the <b>Outstanding</b> amount. |
| <b>Paid</b>     | Settled in full.                                                                                                                           |
| <b>Credited</b> | Cancelled in full by credit notes.                                                                                                         |

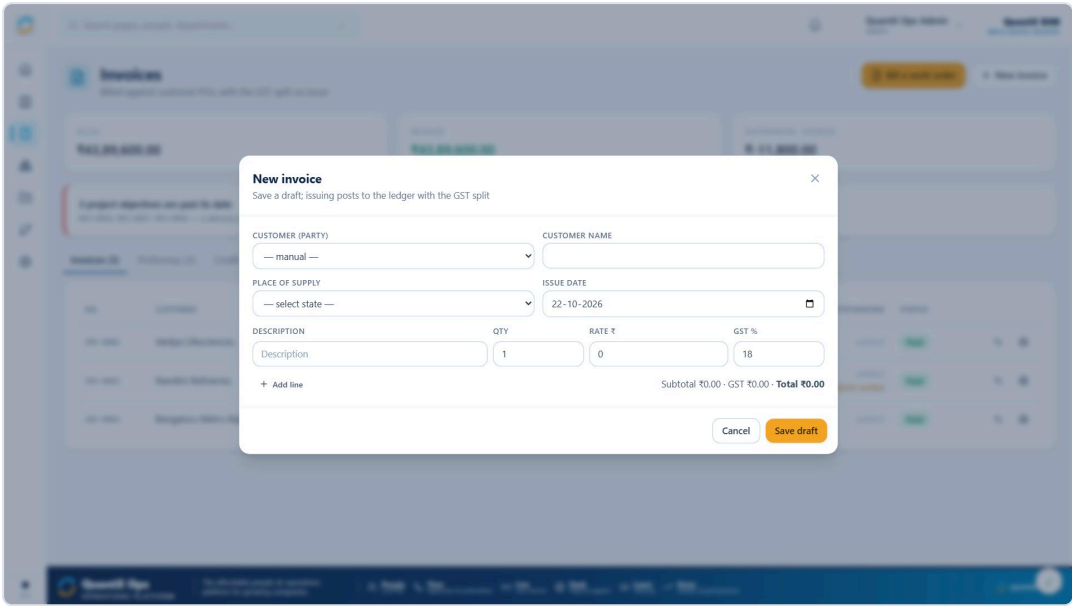
The GST on the row tells you how it was charged: **IGST** for a sale to another state, **CGST + SGST** for a sale within the state. It is worked out on issue from the place of supply.

## Billing a work order

The usual way to invoice is **Bill a work order**: choose the work order and the milestone, and the amounts are filled in for you from what was agreed. This is how project billing (chapter 7) becomes an invoice.

## Raising an invoice by hand

For anything else, click **New invoice**. *Save a draft; issuing posts to the ledger with the GST split.*



The New invoice form. Nothing is posted until you **issue** the saved draft.

| Field                           | What to enter                                                                                                     |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------|
| Customer (party)                | Choose a customer, or leave <b>manual</b> and type a <b>Customer name</b> .                                       |
| Place of supply                 | The state the supply is made to. It decides IGST or CGST + SGST.                                                  |
| Issue date                      | Defaults to today.                                                                                                |
| Description, Qty, Rate ₹, GST % | One line per item (GST defaults to 18). <b>Add line</b> for more. The subtotal, GST and total update as you type. |

Click **Save draft**. When it is right, **issue** it: you are asked to confirm, because an issued invoice posts to the ledger and can only be **voided** afterwards, not edited.

At the end of each row two icons help: the **arrow** raises a **credit or debit note** against the invoice (for a return, a discount or a correction), and the **printer** opens the tax invoice.

## Cashbook

**Cashbook** records money in and out. Three tabs: **Receipts** (money received), **Expenses** (costs and claims recorded) and **Payments** (money paid to suppliers). Three buttons at the top: **Record receipt**, **Record expense** and **Pay**.

The screenshot shows the 'Cashbook' section of the QuantX Ops Admin interface. It features a search bar at the top, navigation tabs for 'Receipts', 'Expenses', and 'Payments', and three action buttons: '+ Record expense', 'Pay', and '+ Record receipt'. Below these is a table with the following data:

| NO.      | DATE       | PARTY                                                                        | INVOICE  | INTO | METHOD        | AMOUNT        |
|----------|------------|------------------------------------------------------------------------------|----------|------|---------------|---------------|
| REC-0004 | 2026-09-22 | Bengaluru Metro Rail<br>E33 Final receipt settling INV-0003 against REC-0003 | INV-0003 | Bank | Bank Transfer | ₹14,03,964.00 |
| REC-0002 | 2026-09-05 | Vaidya Lifesciences<br>INV-0002 against WIO-0002 - advance                   | INV-0002 | Bank | Bank Transfer | ₹2,93,230.00  |
| REC-0001 | 2026-08-28 | Nandini Refineries<br>INV-0001 against WIO-0001 - advance                    | INV-0001 | Bank | Bank Transfer | ₹5,86,460.00  |
| REC-0003 | 2026-08-20 | Bengaluru Metro Rail<br>INV-0003 against WIO-0003 - advance                  | INV-0003 | Bank | Bank Transfer | ₹21,05,946.00 |

*Receipts. Each row shows the date, the party, the invoice it settles, the account it went **Into** and the method.*

- **Record receipt** logs money received from a customer. Choose the invoice it settles; the invoice's **Outstanding** goes down and, when it reaches zero, the invoice shows **Paid**.
- **Record expense** records a cost or an employee's claim. Every expense needs a stated purpose, and claims go for approval before they are paid.
- **Pay** settles a supplier bill or an approved claim.

Each of these posts to the ledger by itself, with the right accounts, so there is nothing to journal separately.

## Bank Reconciliation

**Bank Reconciliation** checks the books against the bank. Choose the **Bank / cash account**, enter the **Statement date** and the **Statement balance** from your bank statement, and tick off the **Uncleared ledger lines** that appear on the statement. The tiles show your **Book balance**, what has **Cleared**, and the **Difference**. When the difference is zero, click **Reconcile**.

**Bank Reconciliation**

BANK / CASH ACCOUNT: 1001 - Cash in Hand | STATEMENT DATE: 22-10-2026 | STATEMENT BALANCE: 0.00

BOOK BALANCE: ₹0.00 | CLEARED AS AT 2026-10-22: ₹0.00 | CLEARED (WITH TICKS): ₹0.00 | DIFFERENCE: ₹0.00

Uncleared ledger lines: ☐ Show cleared lines, to undo one

**Nothing to reconcile**  
All lines on this account are cleared.

Bank Reconciliation with nothing left to clear. Tick **Show cleared lines** to undo one that was ticked by mistake.

## General Ledger

**General Ledger** is the book behind everything. On the left is the **Chart of Accounts**: each account's code, name, type (asset, liability, income or expense) and subtype. On the right is the **Trial Balance**, with a green **Balanced** mark when total debits equal total credits. If that ever stops reading *Balanced*, tell your finance lead at once.

**General Ledger** Post journal

**Chart of Accounts** 32

| CODE | NAME                        | TYPE      | SUBTYPE |
|------|-----------------------------|-----------|---------|
| 1001 | Cash in Hand                | Asset     | Cash    |
| 1002 | Bank                        | Asset     | Bank    |
| 1200 | Accounts Receivable         | Asset     | AR      |
| 1301 | Input CGST (recoverable)    | Asset     | Tax     |
| 1302 | Input SGST (recoverable)    | Asset     | Tax     |
| 1303 | Input IGST (recoverable)    | Asset     | Tax     |
| 1500 | Inventory                   | Asset     | —       |
| 1510 | Work in Progress            | Asset     | —       |
| 2010 | Salary Payable              | Liability | —       |
| 2015 | Employee Deductions Payable | Liability | —       |

Showing 1-10 of 32 accounts

**Trial Balance** Balanced

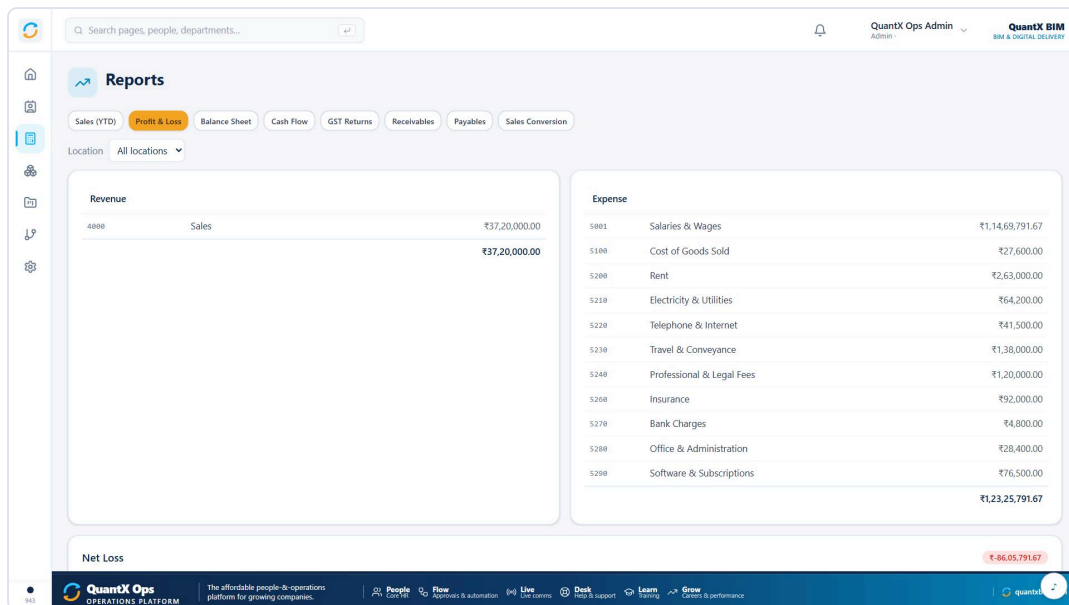
| CODE | NAME                              | DEBIT           | CREDIT          |
|------|-----------------------------------|-----------------|-----------------|
| 1002 | Bank                              | ₹43,89,600.00   | ₹36,462.00      |
| 1200 | Accounts Receivable               | ₹43,89,600.00   | ₹43,89,600.00   |
| 1301 | Input CGST (recoverable)          | ₹1,20,834.00    |                 |
| 1500 | Inventory                         | ₹7,69,640.00    | ₹2,19,140.00    |
| 1510 | Work in Progress                  | ₹74,800.00      |                 |
| 2010 | Salary Payable                    |                 | ₹1,10,59,791.67 |
| 2015 | Employee Deductions Payable       |                 | ₹4,10,000.00    |
| 2100 | Accounts Payable                  | ₹36,462.00      | ₹16,20,534.00   |
| 2101 | Output CGST                       |                 | ₹44,730.00      |
| 2102 | Output SGST                       |                 | ₹44,730.00      |
| 2103 | Output IGST                       |                 | ₹5,80,140.00    |
| 2400 | Goods Received / Invoice Received | ₹7,08,200.00    | ₹6,89,800.00    |
| 4000 | Sales                             |                 | ₹37,20,000.00   |
| 5001 | Salaries & Wages                  | ₹1,14,69,791.67 |                 |

The chart of accounts and the trial balance. Click **Post journal** for an adjusting entry by hand: it must balance before it can be posted.

Almost every entry here was made by another screen. Use **Post journal** only for the rare adjustment that no other screen covers.

## Reports

**Reports** turns the ledger into the statements people ask for. Each report is a tab: **Sales (YTD)**, **Profit & Loss**, **Balance Sheet**, **Cash Flow**, **GST Returns**, **Receivables**, **Payables** and **Sales Conversion**. Use the **Location** filter to look at one location or all of them.



*Profit & Loss, with revenue on the left and expense on the right and the net result below.*

The **GST Returns** tab prepares the figures for your returns, **Receivables** and **Payables** list who owes you and whom you owe, and **Sales Conversion** shows how deals have turned into sales.

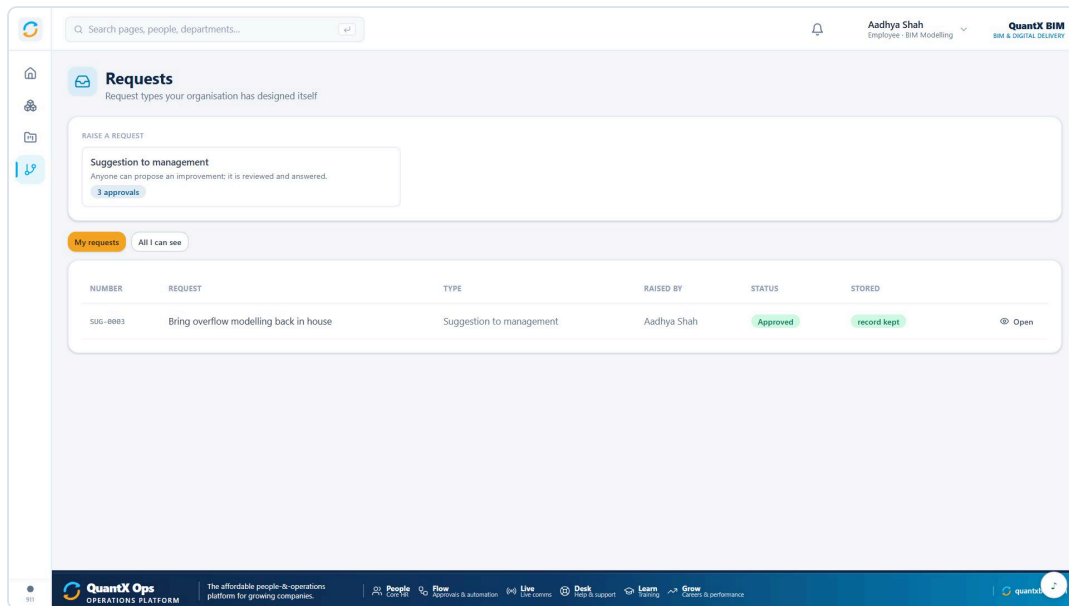
## 10. Requesting and approving

Two ideas run through the whole product. **Anything that needs someone else's agreement is a request that follows a route**, and **anything routed to you appears in your Approvals inbox**. This chapter covers both sides: raising your own requests, and acting on the ones that reach you.

### Raising a request

Some requests have their own screens: leave on **Leave**, overtime on **Overtime & Comp-off**, a purchase on **Procurement**. For everything else your company can define **request types**: forms and routes it designed itself, such as a suggestion to management, a travel request or an equipment request.

Open **Requests** (Workflow group). Under **Raise a request** you see a tile for each type you are allowed to raise. Each tile shows its name, a short description and how many approvals it needs. Click the one you want, fill in the form it opens and submit.



*Requests. One type is available to this user: a suggestion to management, which goes through three approvals.*

Below the tiles, two tabs list requests:

| Tab                  | Shows                                                                                                   |
|----------------------|---------------------------------------------------------------------------------------------------------|
| <b>My requests</b>   | Every request you raised, with its number, status and whether a record was kept.                        |
| <b>All I can see</b> | Requests raised by others that you are allowed to see, because you approve them or your role allows it. |

Each row shows the **Number** (for example *SUG-0003*), the **Request** title, its **Type**, who it was **Raised by** and its **Status**. The column **Stored** reads *record kept* once the request has been approved and the answers were saved as the agreed record. Click **Open** on any row to read it, with its history.

## Acting on approvals

Your **Approvals** inbox is the other half. It lists every step that is waiting for **you**: what it is, which step of the route it is on, and who it is for. Chapter 1 explains the four actions:

| Action              | When to use it                                                                                          |
|---------------------|---------------------------------------------------------------------------------------------------------|
| <b>Open</b>         | To read everything first, add a <b>review comment</b> , and then approve.                               |
| <b>Approve</b>      | When it is right as it stands.                                                                          |
| <b>Push back...</b> | When something needs correcting. Choose the earlier step it should return to and <b>give a reason</b> . |
| <b>Reject</b>       | When it should not go ahead. You are asked for a reason.                                                |

A few things worth knowing:

- **You see only your own steps.** The inbox never shows you someone else's approvals.

- **The route follows the organisation.** Approvers are found from the position tree, for example *Line Manager* or *Concerned HR*, so a request always reaches whoever holds that role now, even if people have changed.
- **Some steps run in a loop.** An appraisal, for instance, goes to the line manager for comment and back to the employee until both are content. The button then reads **Push out** instead of **Approve**.
- **Auto-approved routes.** If a type has no steps, it is approved on submission. The designer is warned of this, and you will see it noted as *Approved automatically*.

## Following your own request

Open **Requests**, **My requests** to see where yours stands. The status changes as each approver acts. If one is **pushed back**, it returns to you with the reason: correct it and resubmit. If it is **rejected**, the reason is part of the record.

Everything is recorded: who acted, what they did, when, and any comment, so a decision can always be explained afterwards.

## 11. When something looks wrong

Most problems have a short, ordinary cause. Find what you see in the left column.

### Signing in

| You see                                           | Likely cause                                             | What to do                                                                            |
|---------------------------------------------------|----------------------------------------------------------|---------------------------------------------------------------------------------------|
| The password is refused                           | A typing slip, or Caps Lock.                             | Try again, typing the <b>Login ID</b> exactly as issued (company code, dash, number). |
| You are asked to wait before trying again         | Several failed attempts in a minute.                     | Wait a minute, then try once more. This protects your account.                        |
| You are not sure of your <b>Login ID</b>          | The Login ID is not your employee code.                  | Ask your administrator, or look at the notice you were sent.                          |
| You forgot your password                          | —                                                        | Ask your administrator to issue a new one. You can change it yourself later.          |
| You are sent straight to <i>Set your password</i> | Your account asks you to choose your own password first. | Complete the form (at least 8 characters).                                            |

### Screens and menus

| You see                                             | Likely cause                                                         | What to do                                                                |
|-----------------------------------------------------|----------------------------------------------------------------------|---------------------------------------------------------------------------|
| A menu group or screen is <b>missing</b>            | Your role does not include it. The menu only shows what you may use. | If you need it for your work, ask your administrator to grant the access. |
| <b>You do not have access to this</b> inside a page | The page needs a permission your role lacks.                         | Tell your administrator which page and what you were trying to do.        |

|                          |                                                         |                                                                                        |
|--------------------------|---------------------------------------------------------|----------------------------------------------------------------------------------------|
| A list is <b>empty</b>   | Nothing has been entered yet, or a filter is hiding it. | Clear the filters and the search box. For a new company, check that setup is complete. |
| Figures look out of date | The page was loaded earlier.                            | Reload the page.                                                                       |

## People and time

| You see                                            | Likely cause                                                                           | What to do                                                                                               |
|----------------------------------------------------|----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| A day on <b>Attendance</b> shows <b>Not marked</b> | Nothing has been recorded for that day yet.                                            | Tell your manager or HR. They correct attendance, not you.                                               |
| A day shows <b>Absent</b> but you were at work     | The record is wrong or the punch did not arrive.                                       | Tell your manager, giving the date.                                                                      |
| Leave stays <b>Pending</b>                         | The next approver has not acted.                                                       | Open <b>Leave</b> to see it, and remind the approver. You can see who holds it in their Approvals inbox. |
| Leave shows <b>Rejected</b>                        | An approver refused it.                                                                | Speak to the approver; apply again with a corrected reason or dates if appropriate.                      |
| An overtime claim was refused when you submitted   | It was checked against attendance for that date and did not match.                     | Check that you were marked present that day, or choose <b>Field work</b> if it applies.                  |
| Times seem off by hours                            | Times are stored in one standard time and shown on the clock of the person's location. | Check the location's time zone with your administrator.                                                  |

## Work and money

| You see                                               | Likely cause                                                    | What to do                                                                             |
|-------------------------------------------------------|-----------------------------------------------------------------|----------------------------------------------------------------------------------------|
| A purchase order cannot be received                   | It has not been <b>approved</b> yet.                            | Check <b>Approvals</b> ; goods are received only against an approved order.            |
| An invoice cannot be edited                           | It has been <b>issued</b> . An issued invoice is in the ledger. | Raise a <b>credit note</b> (the arrow icon) to correct it.                             |
| The <b>Trial Balance</b> does not say <i>Balanced</i> | Something is wrong in the books.                                | Do not post anything further. Tell your finance lead immediately.                      |
| A stock item shows a negative or odd quantity         | A receipt or issue was missed or entered twice.                 | Tell your stores lead. They correct it with a <b>stock adjustment</b> , with a reason. |

## Getting help

1. **Helpdesk:** read the published answers, or **Ask a question**. The reply comes by email and stays under **My queries**.
2. **Your manager or concerned HR contact:** for anything about your own record, attendance or leave.

3. **Your administrator:** for access, passwords and anything that seems to be set up wrongly.

When you ask for help, say **which screen** you were on, **what you did** and **what you saw**. A screenshot of the page makes it much quicker.

# Index

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Every topic in this document, alphabetically, with the page it is explained on.

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