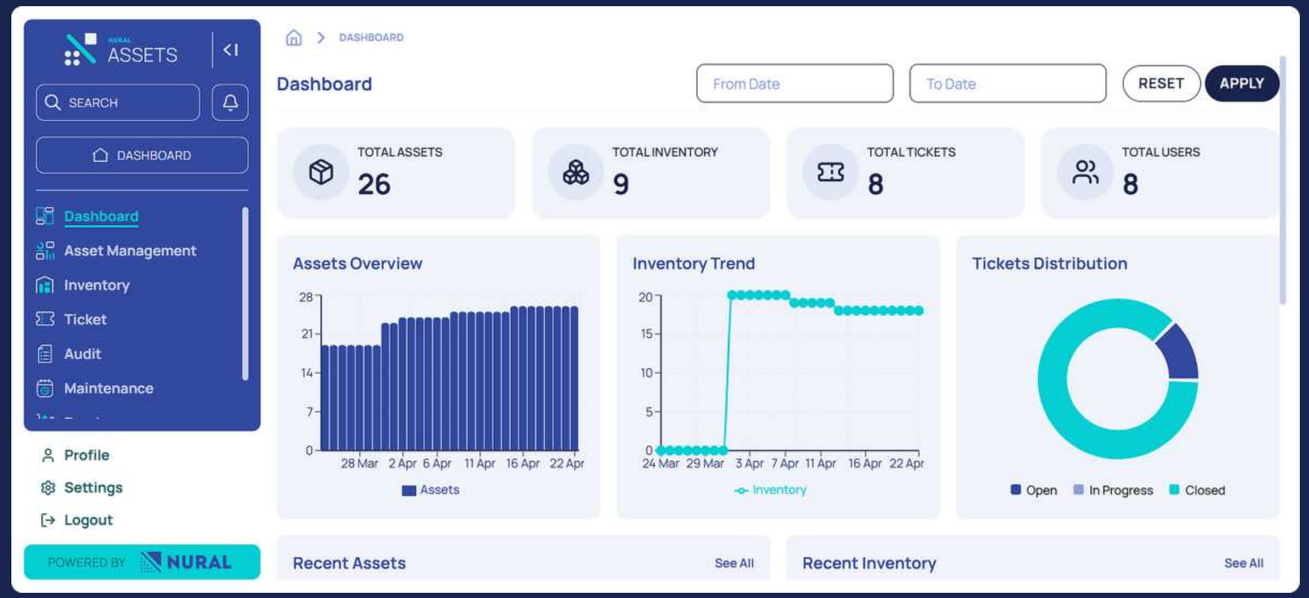
NURAL
ASSETS

User Manual

Everything in Nural Assets, screen by screen.

VERSION 2.0 · OCTOBER 2026



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Introduction

Nural Assets is an enterprise asset management platform that helps organisations track, maintain, and audit their assets across locations from a single web console. This User Manual guides users through the application module by module, so you can set it up and use it with confidence.

How to use this manual: each module has an Add subsection for creating records and a View/Edit subsection for managing them. Numbered steps follow the on-screen order, and every screenshot is captioned with the screen it shows.

Getting Started

Create your account, sign in, and get oriented before you start setting the system up.

Signup pages

Login pages

Signup Page Description

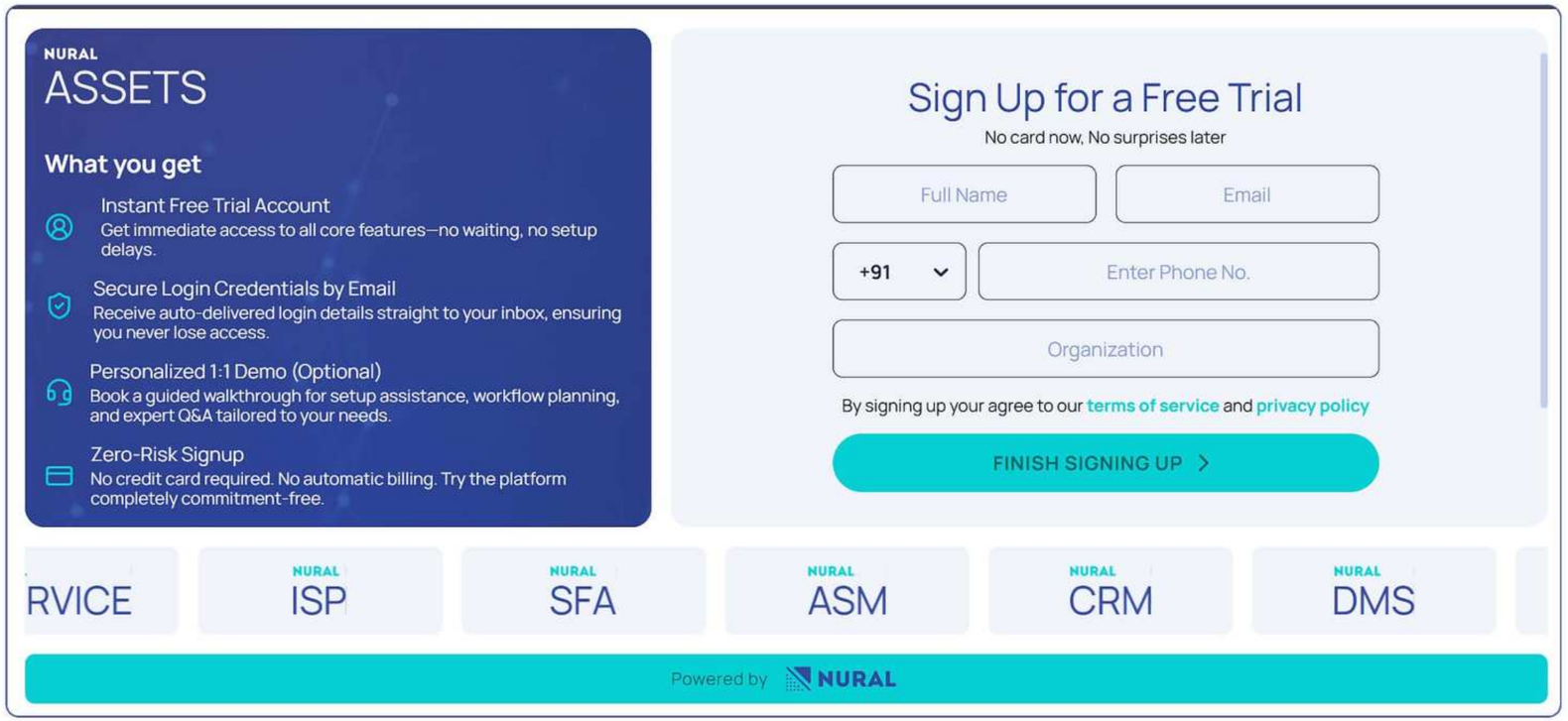


Figure 1 - Signup pages

STEPS

1. Enter your full name in <Full Name> field. Name cannot be blank.
2. Enter your email in <Email> field. A valid email is required - your login credentials will be sent to this address.
3. Select your country code from the dropdown (default <+91>) and enter your mobile number in <Enter Phone No.> field.
4. Enter your organization name in <Organization> field.
5. By signing up, you agree to the <terms of service> and <privacy policy>.
6. Click <FINISH SIGNING UP> to submit the details and create your free trial account.
7. Your login credentials will be auto-delivered to your registered email address; use them to log in to Nural Assets.

Login Page Description

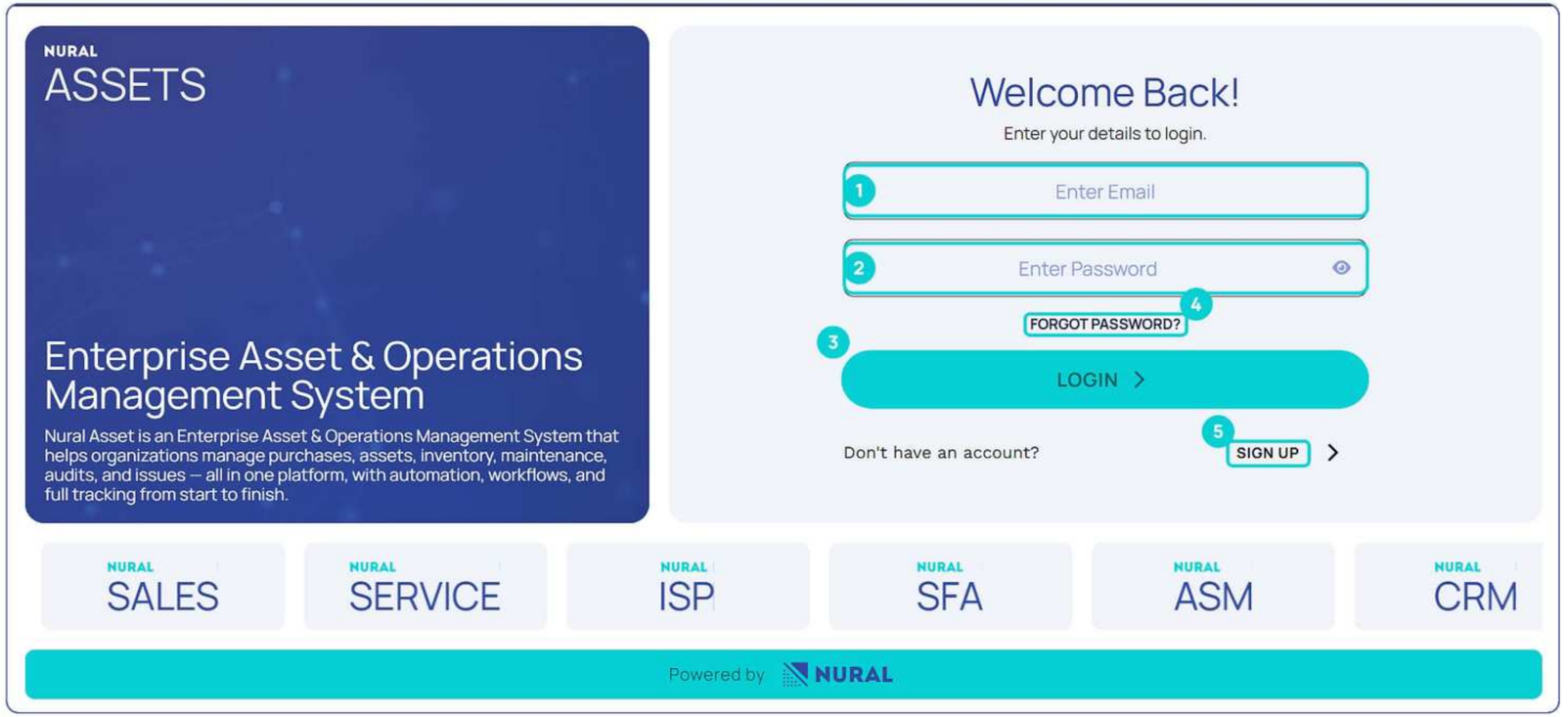


Figure 2 - Login pages (1 of 2)

STEPS

1. Enter your registered email in <Enter Email> field. Email cannot be blank.
2. Enter your password in <Enter Password> field. Password cannot be blank. Click the eye icon to show or hide the password.
3. Click <LOGIN> to sign in to your Nural Assets account.
4. If you have forgotten your password, click <FORGOT PASSWORD?> to reset it.
5. If you do not have an account yet, click <SIGN UP> to create one.

Login Page Description

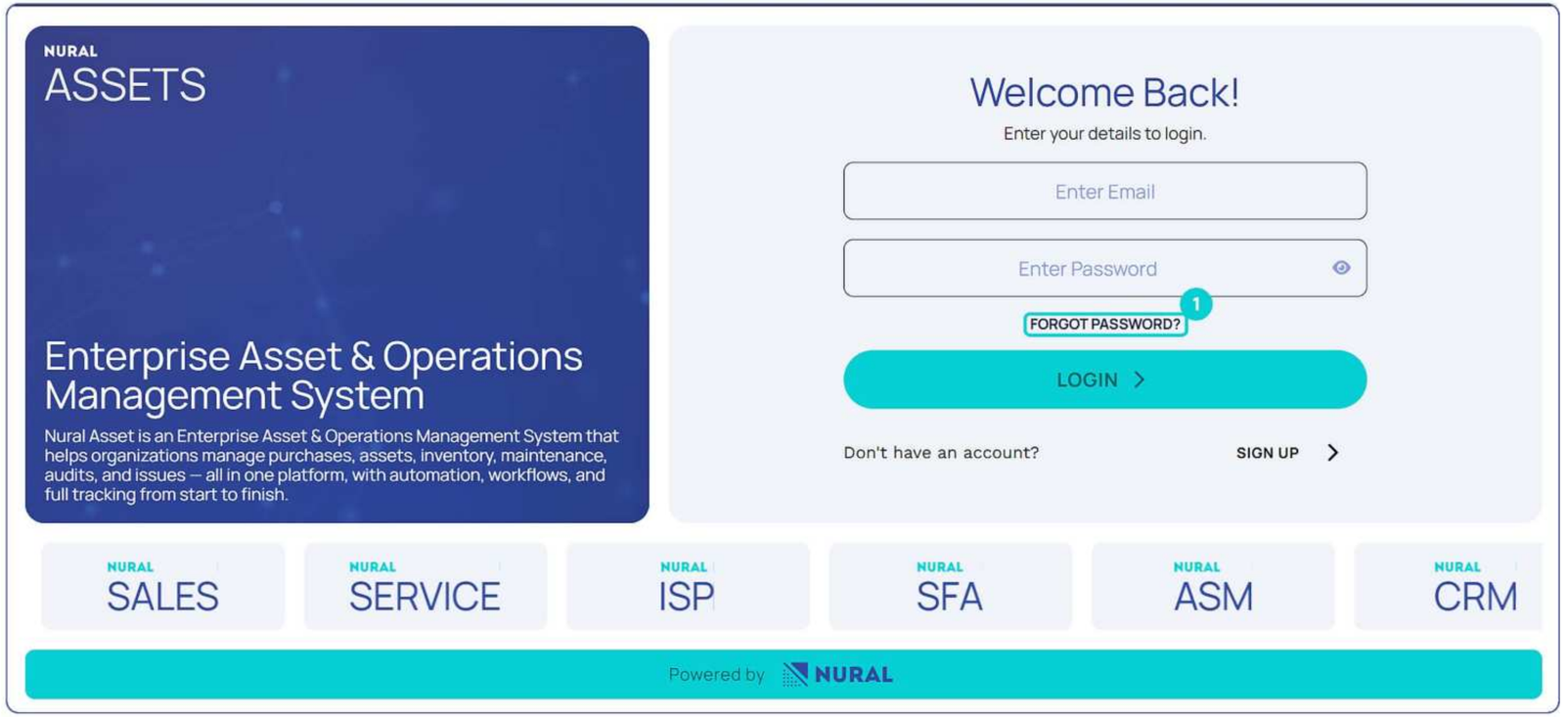


Figure 3 - Login pages (2 of 2)



FORGOT PASSWORD? starts the reset flow

STEPS

1. Click <FORGOT PASSWORD?> on the login page.
2. The Forgot Password screen opens, asking you to enter your email.
3. Enter your registered email in the <Enter Email> field.
4. Click <SEND OTP>. (To return to the login page instead, click <BACK>.)
5. A One-Time Password (OTP) will be sent to your registered email address.
6. Enter the OTP in the <OTP> field and click <SUBMIT OTP>.
7. You will be redirected to the Reset Password screen.
8. Enter your new password in the <New Password> field. It must meet the password policy requirements.
9. Re-enter the same password in the <Confirm Password> field.
10. Click <SUBMIT> to save your new password.

Masters and Settings

Set up the reference data the rest of Nural Assets runs on: departments, locations, vendors, categories, code formats and approval workflows.

- Masters
- Notifications
- Company Info
- Location
- Workflow
- Security
- Vendor Management
- Meter
- Form Builder
- Brand
- Category
- Code Formats

Add New Department

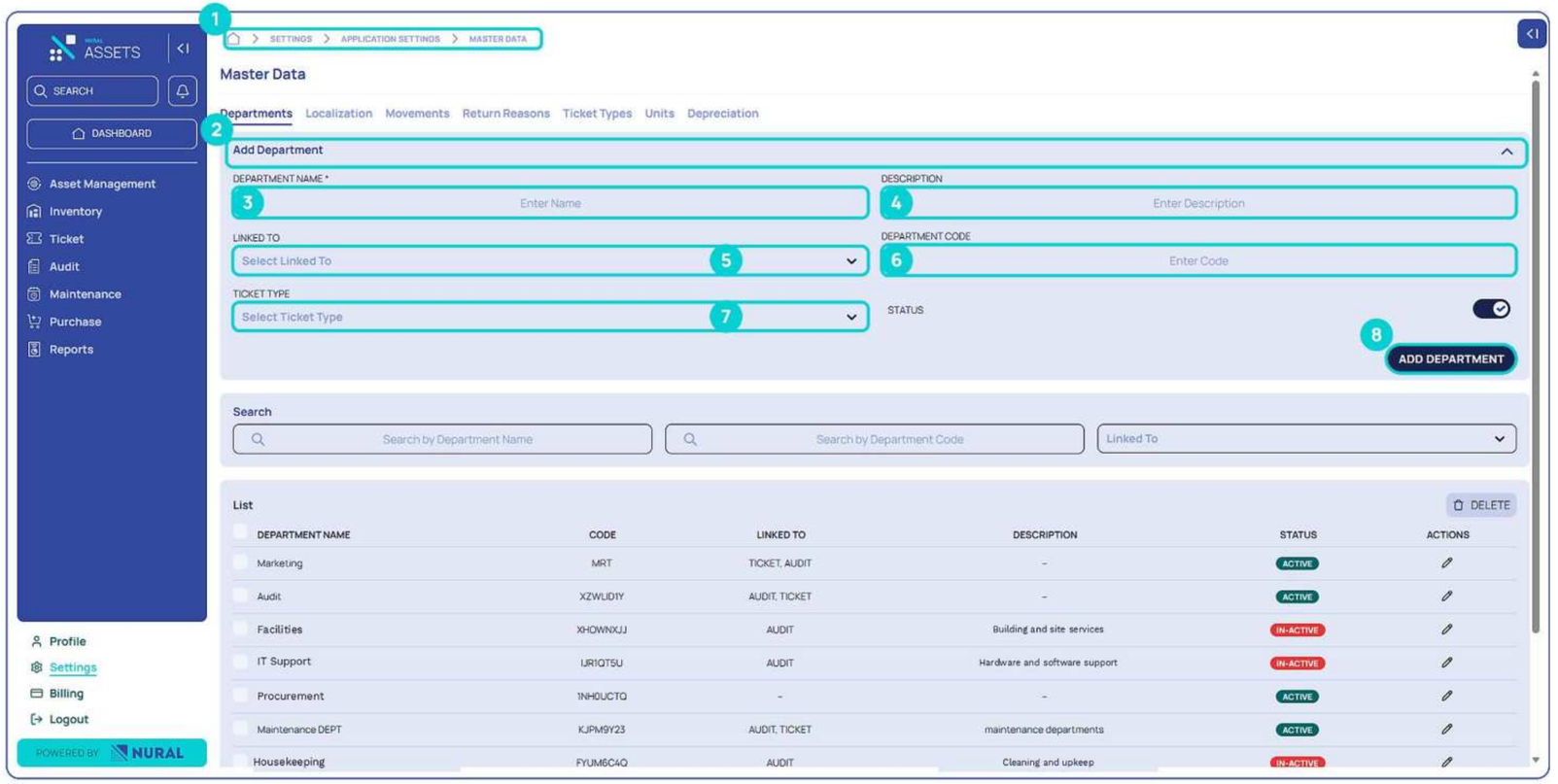


Figure 4 - Add New Department



Status toggle sets Active or Inactive

The Masters section is where you set up and maintain the core reference data that the rest of Nural Assets relies on - departments, localization, stock movements, return reasons, ticket types, units, and depreciation methods. Configuring these masters accurately at the outset keeps data consistent and reliable across every module. Refer to the modules below for step-by-step details.

The Departments module lets you define the organisational departments used across Nural Assets - such as Marketing, Audit, or Maintenance - and link each department to the modules it applies to (for example, Ticket or Audit). Departments are used to group assets, users, and activities by the department responsible for them.

STEPS

1. Go to: Settings → Application Settings → Master Data → Departments.
2. Click Add Department to expand the entry panel.
3. In Department Name (mandatory), enter the name of the department.
4. In Description, optionally describe the department's purpose.

Add New Department

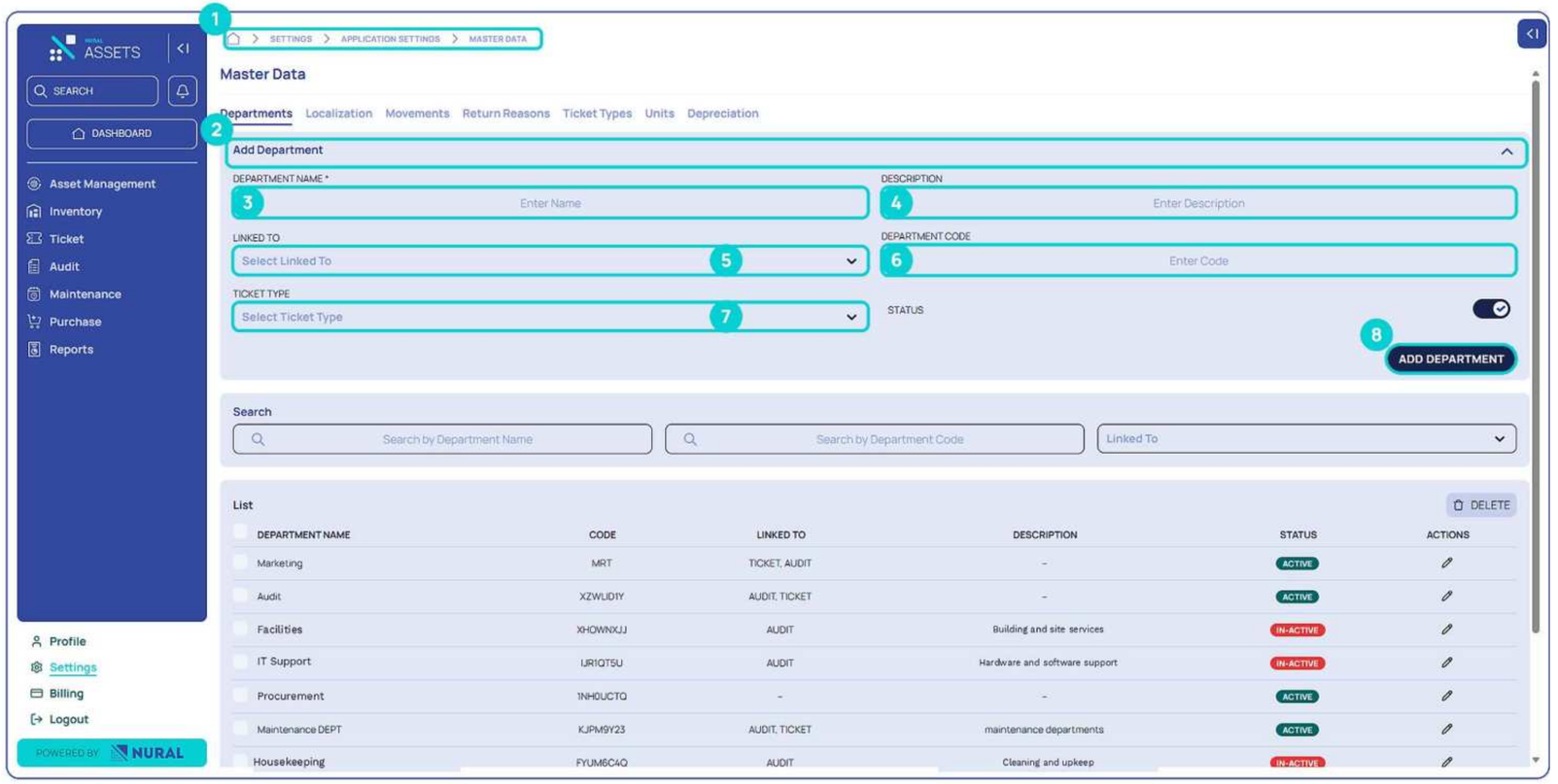


Figure 4 - Add New Department



Status toggle sets Active or Inactive

STEPS, CONTINUED

5. From the Linked To dropdown, select the module(s) the department applies to - for example, Ticket or Audit.
6. Enter a unique Department Code.
7. If the department is linked to Ticket, choose the applicable Ticket Type from the dropdown, then use the Status toggle to mark the department Active (default) or inactive.
8. Click ADD DEPARTMENT to save. The new department appears in the List below.

View/Edit Departments

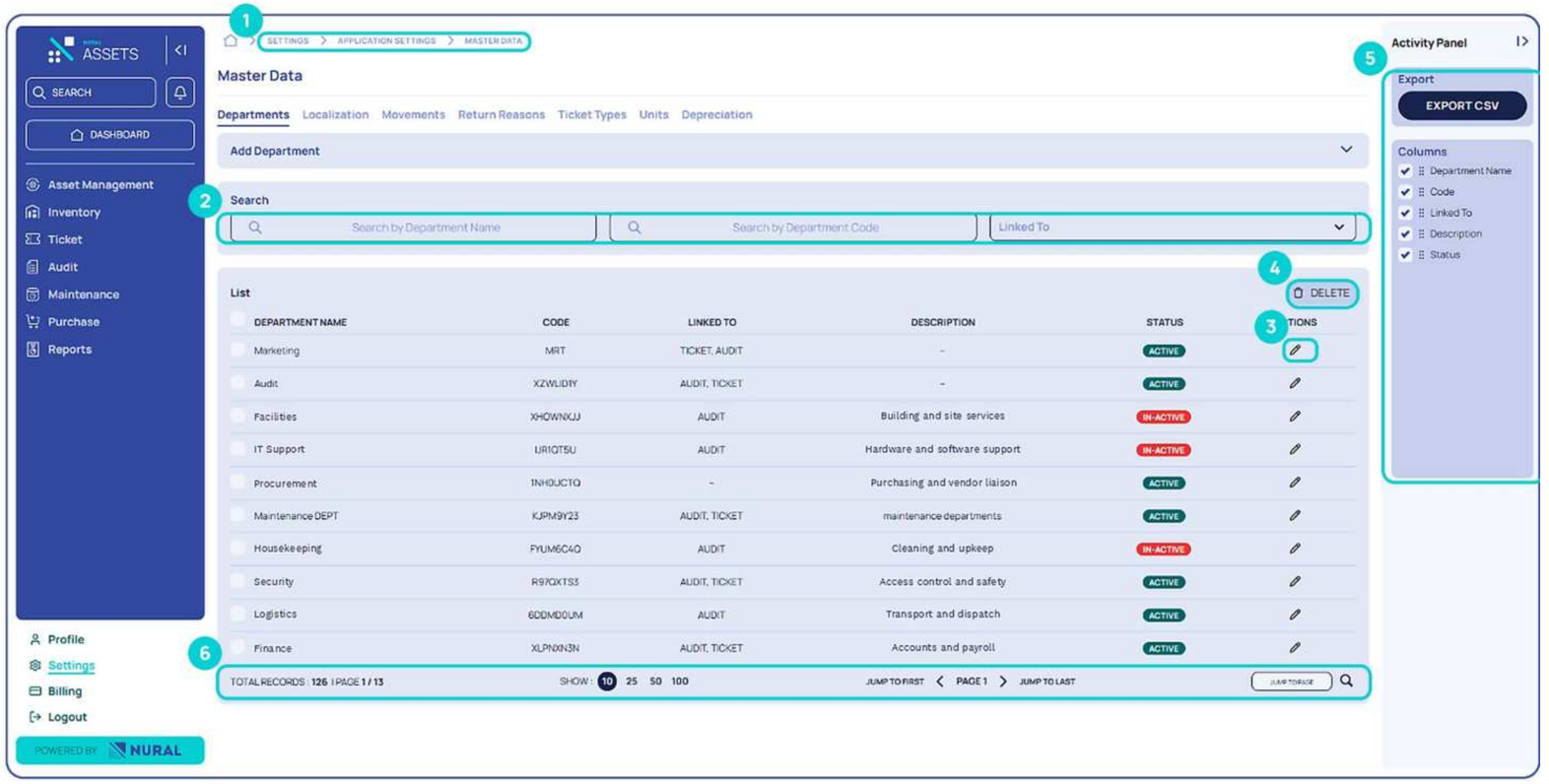


Figure 5 - View/Edit Departments



Edit a row with the pencil icon



Column toggles in the Activity Panel

STEPS

1. Go to: Settings → Application Settings → Master Data → Departments. The List displays all existing departments with their Code, Linked To, Description, and Status.
2. To find a department, use Search by Department Name, Search by Department Code, or the Linked To dropdown to filter the list.
3. To edit a department, click the edit (pencil) icon in the Actions column of its row, update the fields, and save your changes.
4. To delete departments, select the checkbox(es) beside the required rows and click Delete.
5. In the Activity Panel, use the column toggles to show or hide columns (Department Name, Code, Linked To, Description, Status), and click Export CSV to download the list.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to Page to go to a specific page.

Add New Localization

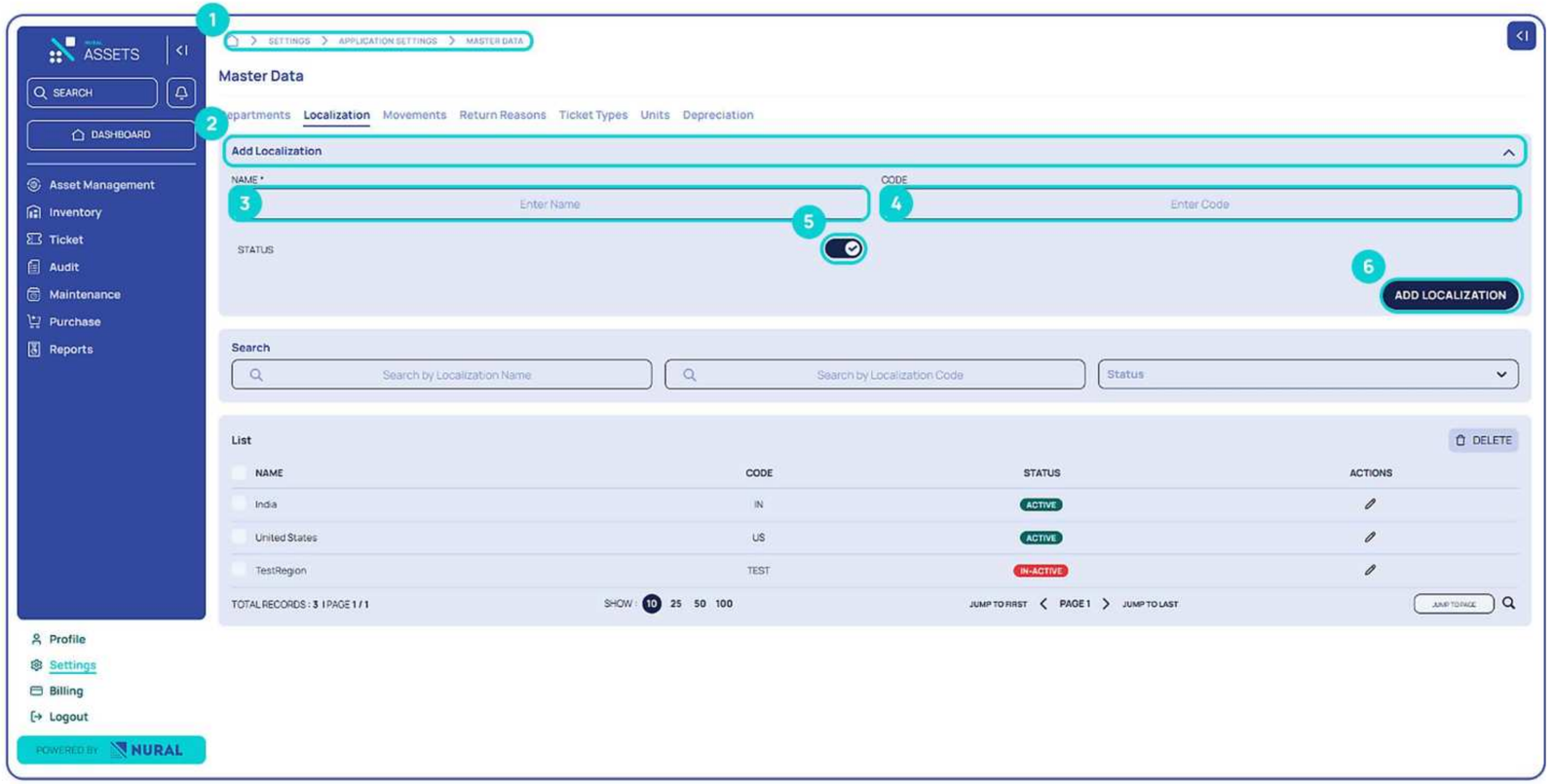


Figure 6 - Add New Localization

The Localization module lets you define the localizations - such as countries or regions - used across Nural Assets. Each localization is a simple Name and Code pair with an Active or inactive status. Localizations serve as reference data when setting up assets, users, and reports for different geographies.

STEPS

1. Go to: Settings → Application Settings → Master Data → Localization.
2. Click Add Localization to expand the entry panel.
3. In Name (mandatory), enter the name of the localization - for example, India or United States.
4. In Code, enter a unique short code for the localization - for example, IN or US.
5. Use the Status toggle to mark the localization Active (default) or inactive.
6. Click ADD LOCALIZATION to save. The new localization appears in the List below.

View/Edit Localization

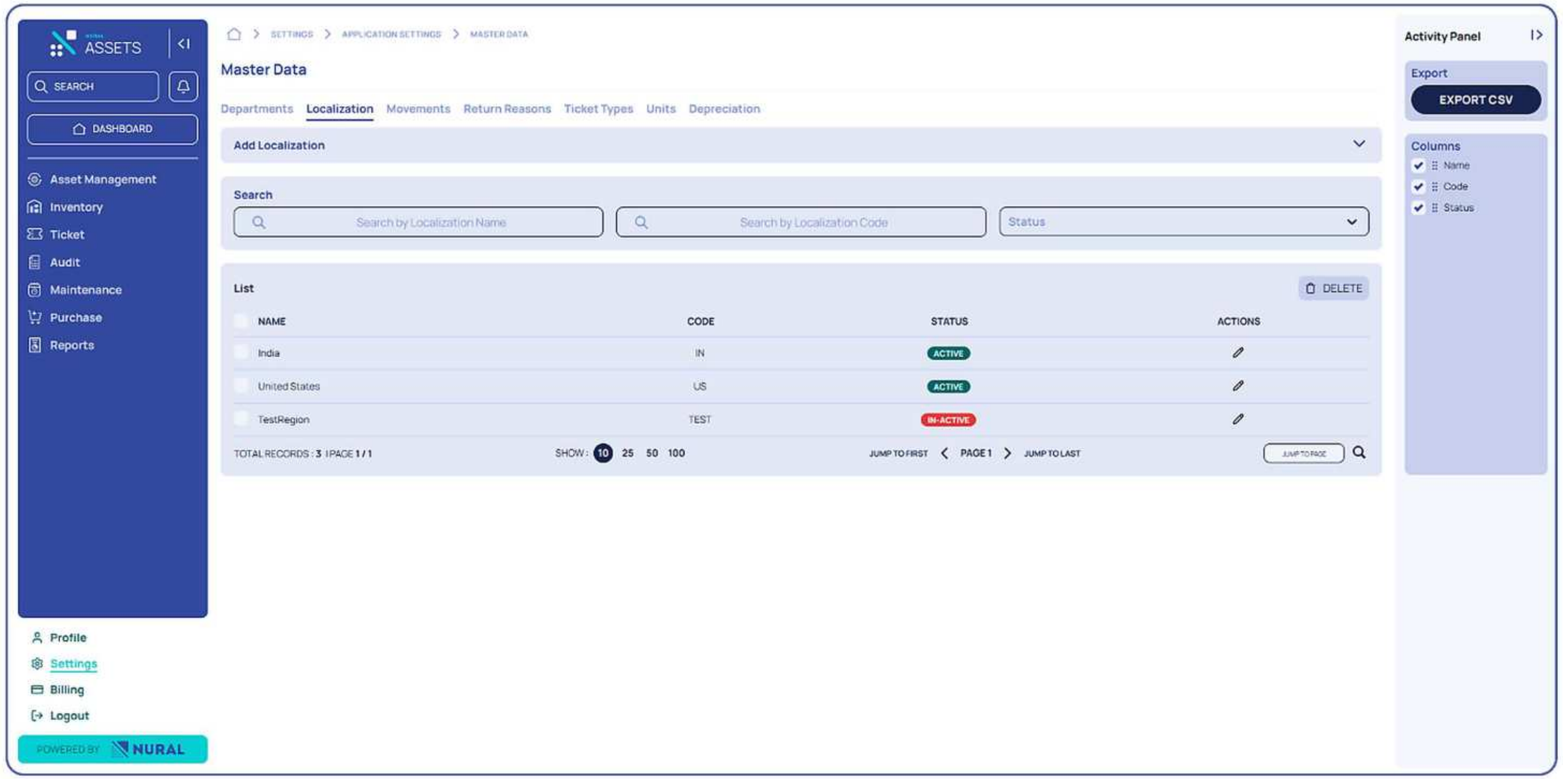


Figure 7 - View/Edit Localization

STEPS

1. Go to: Settings → Application Settings → Master Data → Localization. The List displays all existing localizations with their Code and Status.
2. To find a localization, use Search by Localization Name, Search by Localization Code, or the Status dropdown to filter the list.
3. To edit a localization, click the edit (pencil) icon in the Actions column of its row, update the fields, and save your changes.
4. To delete localizations, select the checkbox(es) beside the required rows and click Delete.
5. In the Activity Panel, use the Columns options to show or hide columns (Name, Code, Status), and click EXPORT CSV under Export to download the list as an Excel/CSV file.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to Page to go to a specific page.

Add New Movement

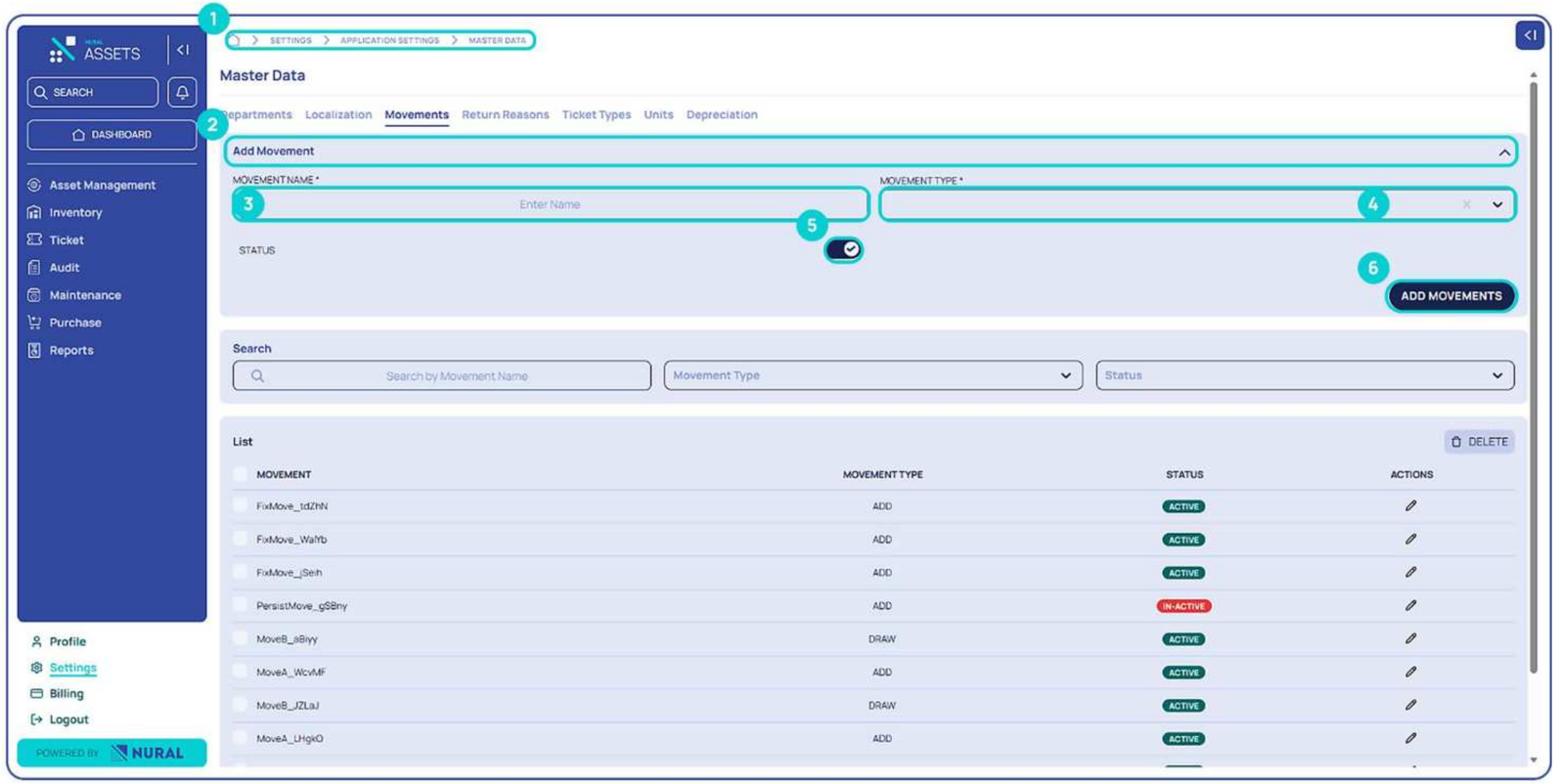


Figure 8 - Add New Movement

The Movements module lets you define the asset movements used across Nural Assets - the named transactions that describe how assets move, each classified by a Movement Type such as Add or Draw. Movements are used when recording asset stock changes across the system.

STEPS

1. Go to: Settings → Application Settings → Master Data → Movements.
2. Click Add Movement to expand the entry panel.
3. In Movement Name (mandatory), enter a name for the movement.
4. From the Movement Type dropdown (mandatory), select the type of movement - for example, Add or Draw.
5. Use the Status toggle to mark the movement Active (default) or inactive.
6. Click ADD MOVEMENTS to save. The new movement appears in the List below.

View/Edit Movements

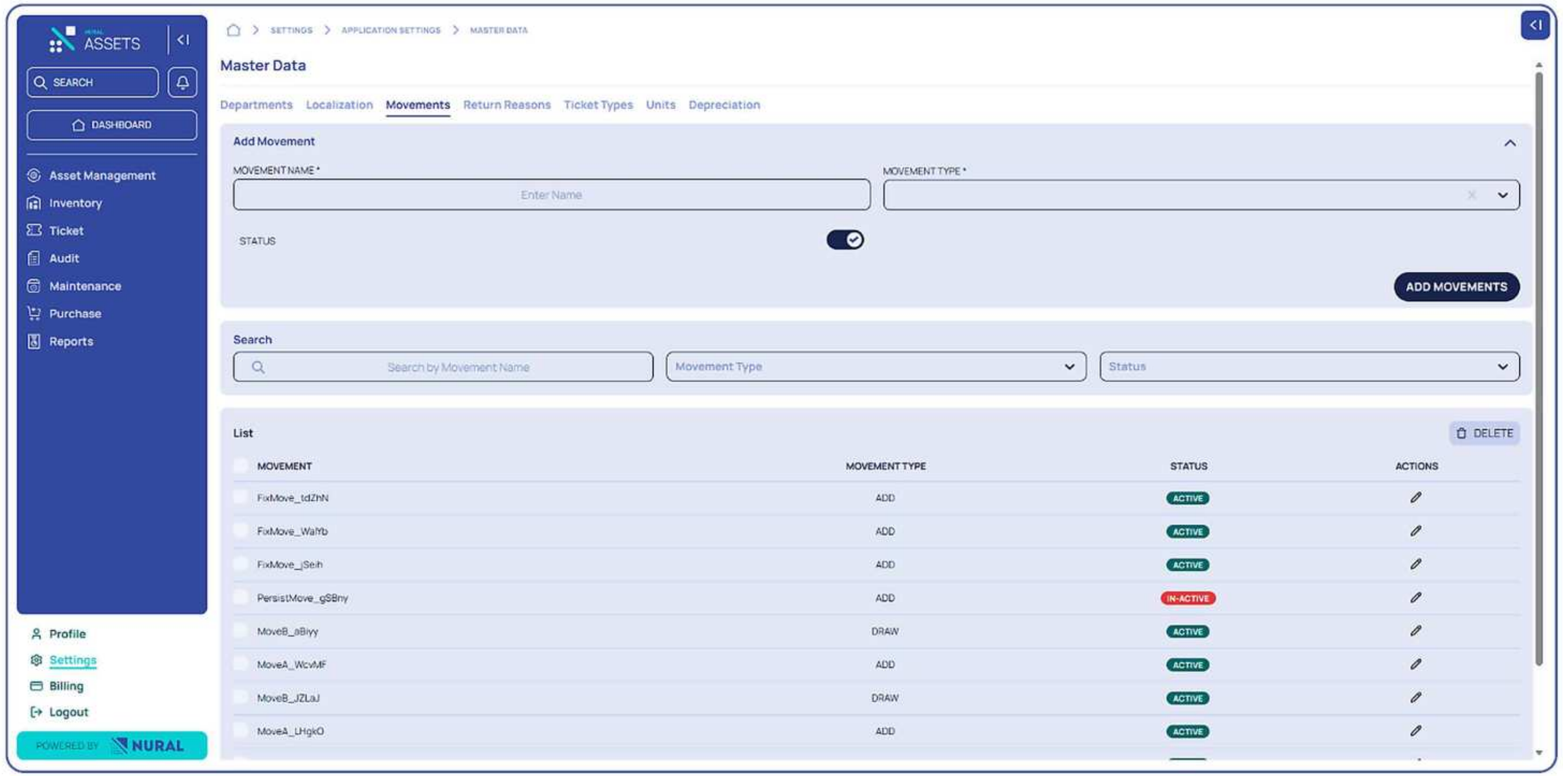


Figure 9 - View/Edit Movements

STEPS

1. Go to: Settings → Application Settings → Master Data → Movements. The List displays all existing movements with their Movement Type and Status.
2. To find a movement, use Search by Movement Name, the Movement Type dropdown, or the Status dropdown to filter the list.
3. To edit a movement, click the edit (pencil) icon in the Actions column of its row, update the fields, and save your changes.
4. To delete movements, select the checkbox(es) beside the required rows and click Delete.
5. In the Activity Panel, use the Columns options to show or hide columns (Movement, Movement Type, Status), and click EXPORT CSV under Export to download the list as an Excel/CSV file.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to Page to go to a specific page.

Add New Return Reason

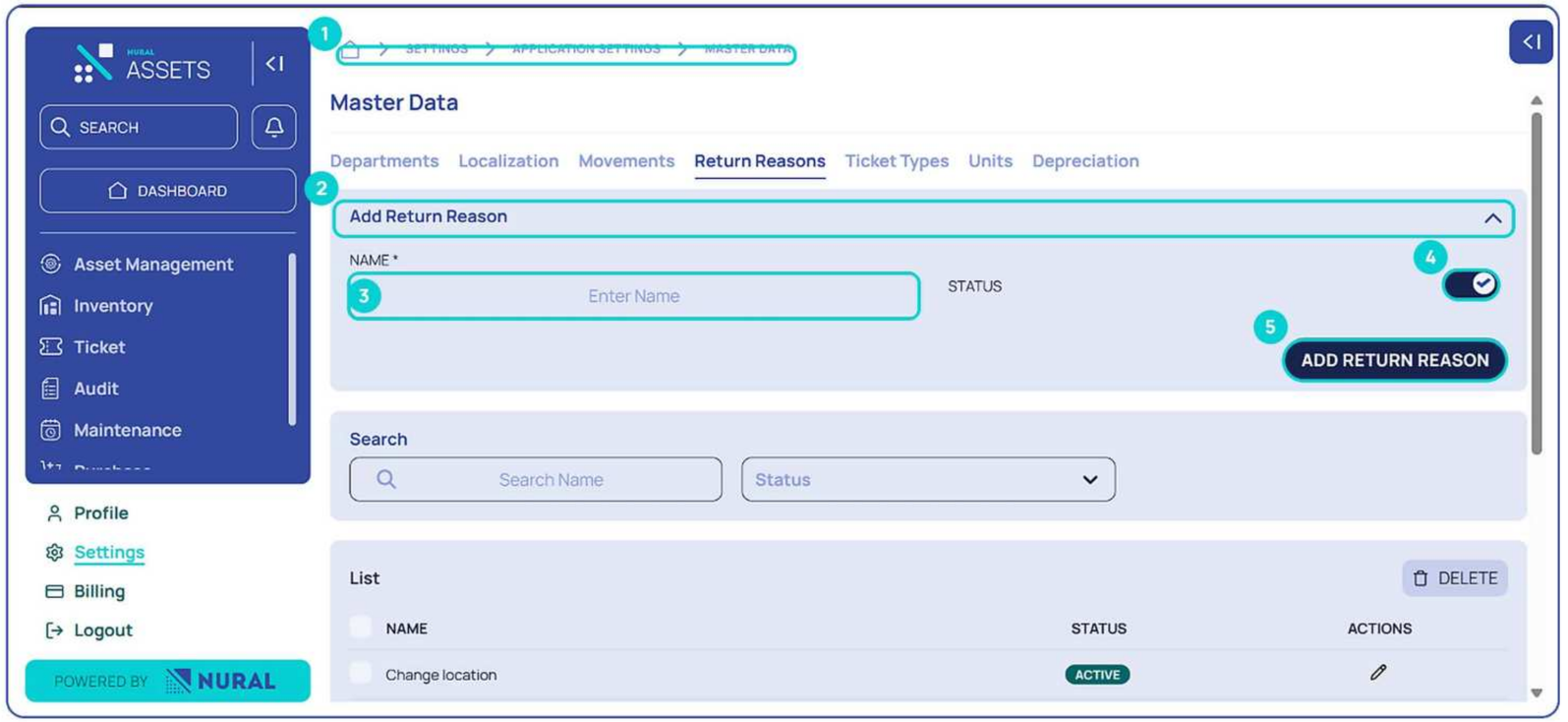


Figure 10 - Add New Return Reason

The Return Reasons module lets you define the reasons used when assets are returned across Nural Assets - for example, Change location or Exit Company. Each return reason is a simple Name with an Active or inactive status, used when recording asset returns.

STEPS

1. Go to: Settings → Application Settings → Master Data → Return Reasons.
2. Click Add Return Reason to expand the entry panel.
3. In Name (mandatory), enter the name of the return reason - for example, Change location.
4. Use the Status toggle to mark the return reason Active (default) or inactive.
5. Click ADD RETURN REASON to save. The new return reason appears in the List below.

View/Edit Return Reasons

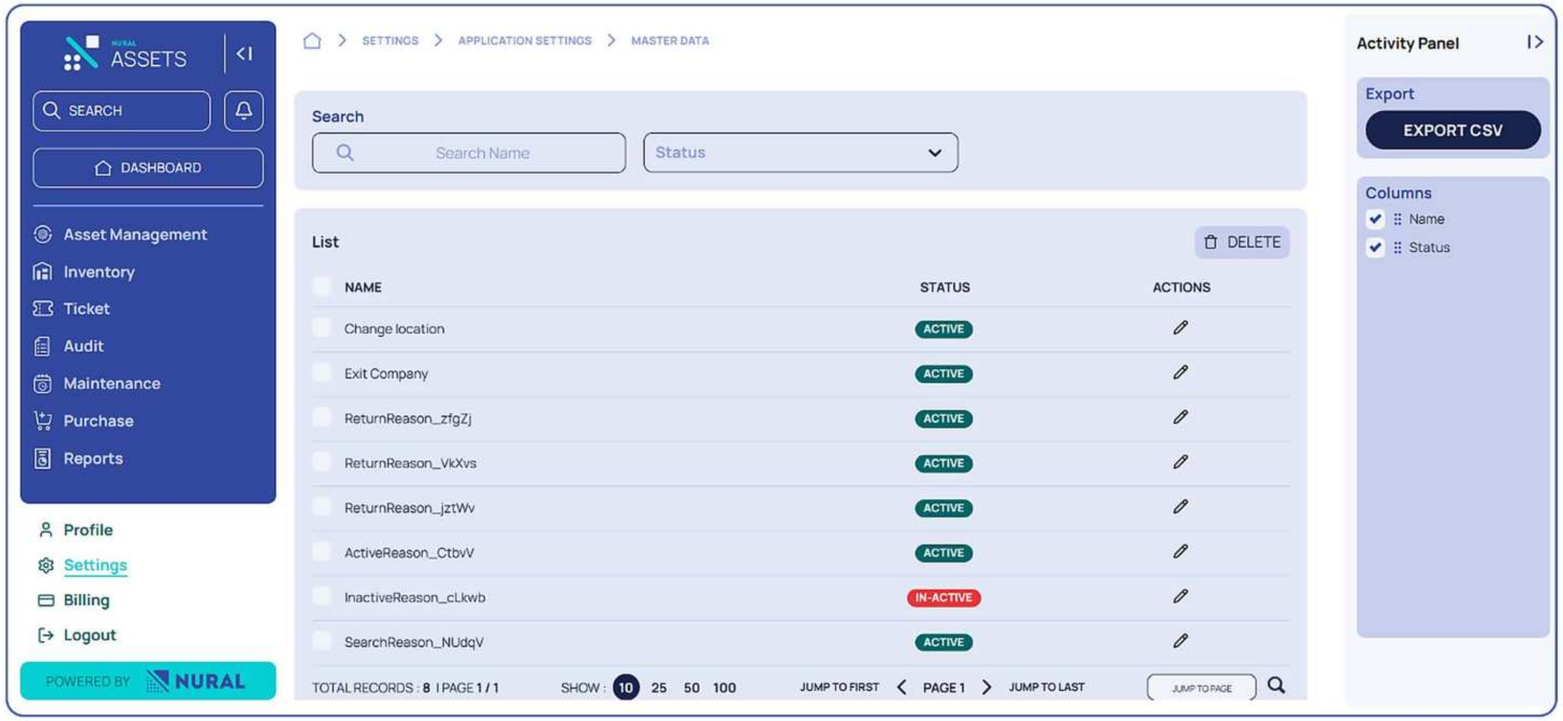


Figure 11 - View/Edit Return Reasons

STEPS

1. Go to: Settings → Application Settings → Master Data → Return Reasons. The List displays all existing return reasons with their Status.
2. To find a return reason, use Search by Name or the Status dropdown to filter the list.
3. To edit a return reason, click the edit (pencil) icon in the Actions column of its row, update the fields, and save your changes.
4. To delete return reasons, select the checkbox(es) beside the required rows and click Delete.
5. In the Activity Panel, use the Columns options to show or hide columns (Name, Status), and click EXPORT CSV under Export to download the list as an Excel/CSV file.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to Page to go to a specific page.

Add New Ticket Type

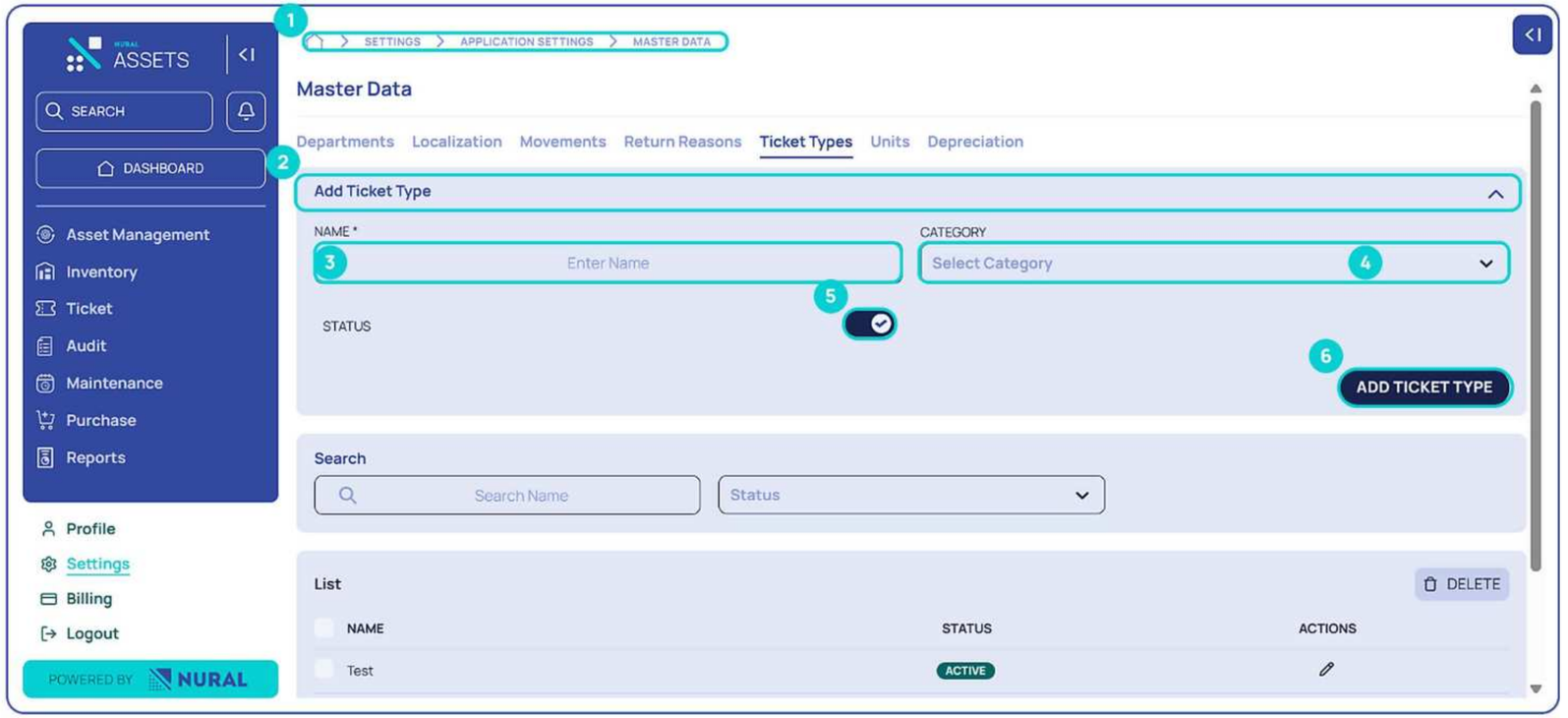


Figure 12 - Add New Ticket Type

The Ticket Types module lets you define the types of tickets raised across Nural Assets - for example, Incident or Service Request - and optionally group each under a Category. Ticket types are used when raising and classifying tickets across the system.

STEPS

1. Go to: Settings → Application Settings → Master Data → Ticket Types.
2. Click Add Ticket Type to expand the entry panel.
3. In Name (mandatory), enter a name for the ticket type - for example, Incident.
4. From the Category dropdown, select the category to group the ticket type under.
5. Use the Status toggle to mark the ticket type Active (default) or inactive.
6. Click ADD TICKET TYPE to save. The new ticket type appears in the List below.

View/Edit Ticket Types

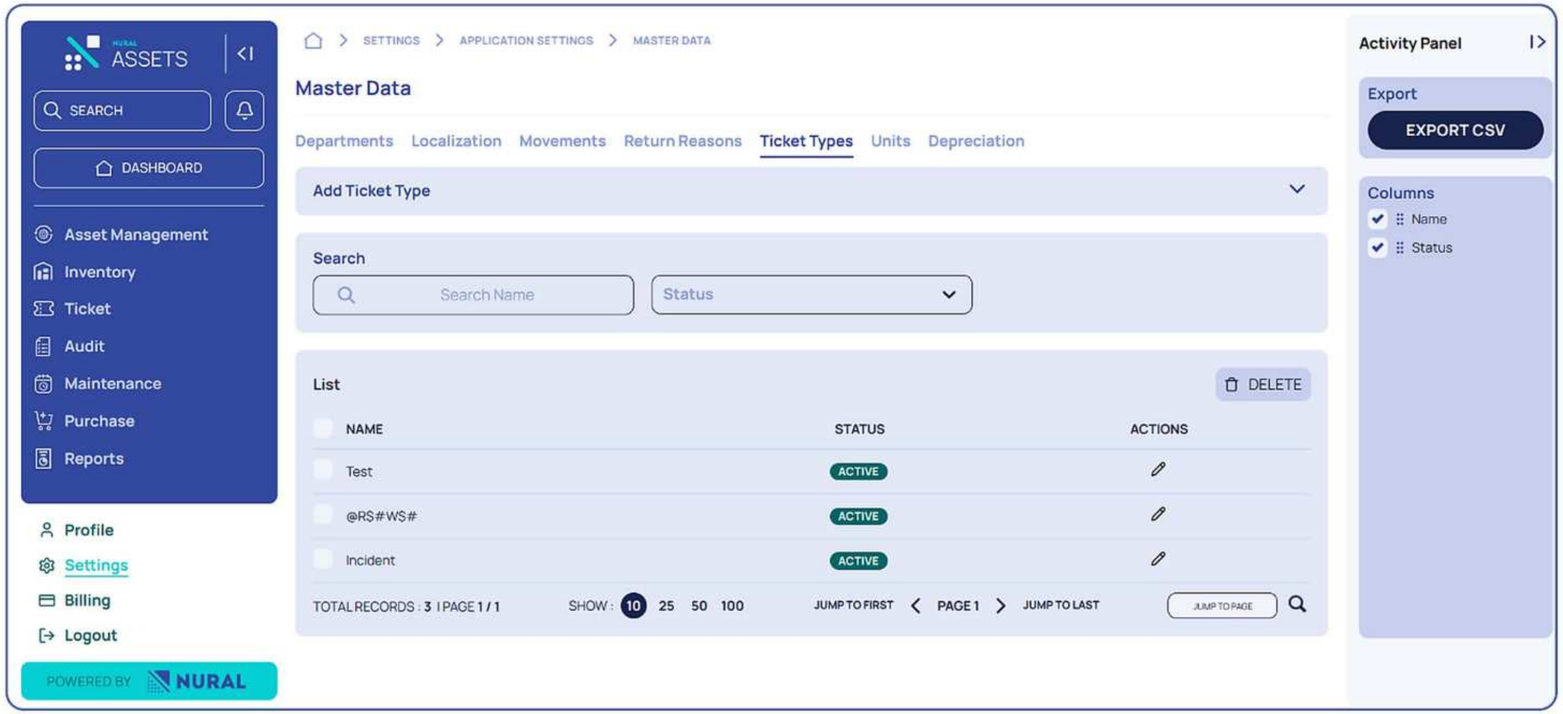


Figure 13 - View/Edit Ticket Types

STEPS

1. Go to: Settings → Application Settings → Master Data → Ticket Types. The List displays all existing ticket types with their Status.
2. To find a ticket type, use Search by Name or the Status dropdown to filter the list.
3. To edit a ticket type, click the edit (pencil) icon in the Actions column of its row, update the fields, and save your changes.
4. To delete ticket types, select the checkbox(es) beside the required rows and click Delete.
5. In the Activity Panel, use the Columns options to show or hide columns (Name, Status), and click EXPORT CSV under Export to download the list as an Excel/CSV file.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to Page to go to a specific page.

Add New Unit

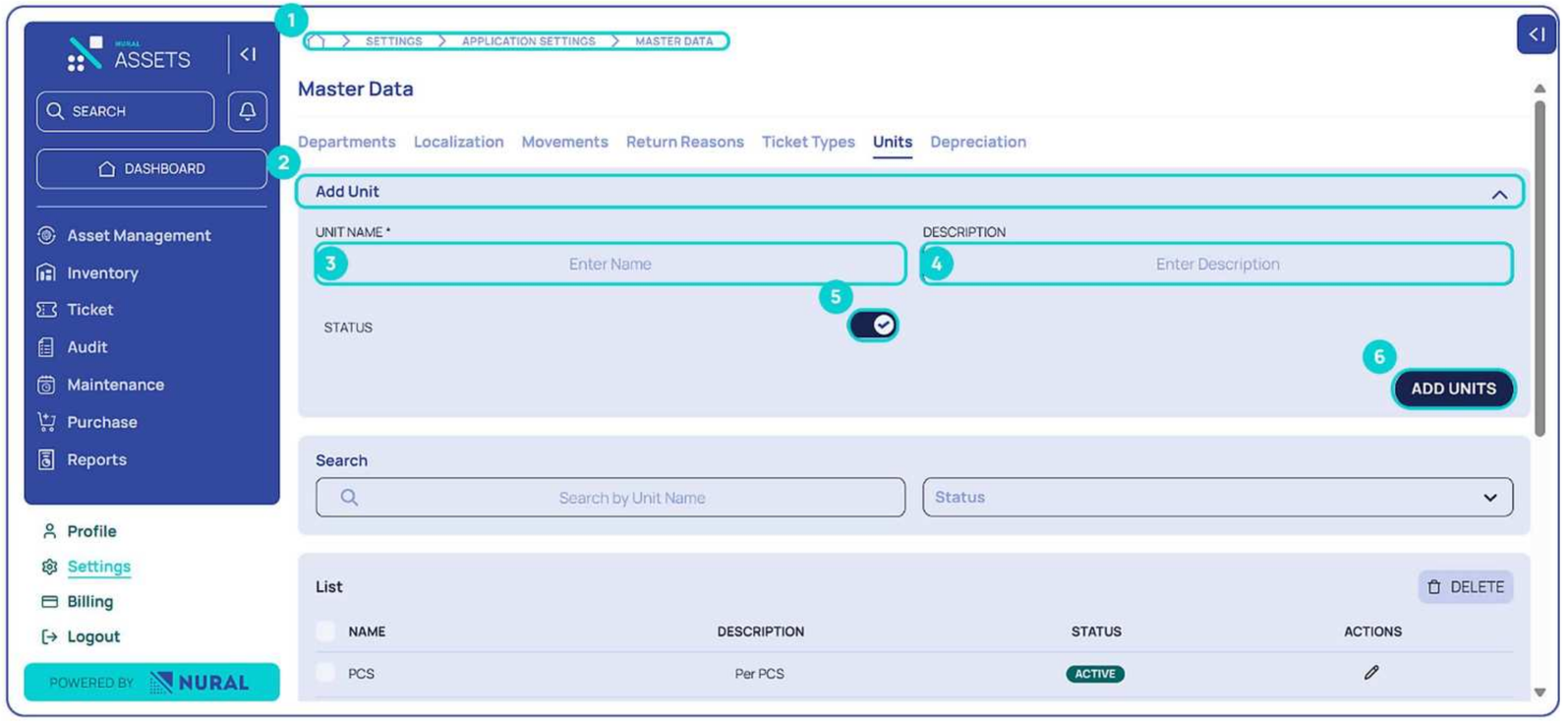


Figure 14 - Add New Unit

The Units module lets you define the units of measure used across Nural Assets - for example, PCS, KWh, or Litre - used to quantify assets and inventory. Each unit is a Unit Name with an optional Description and an Active or inactive status.

STEPS

1. Go to: Settings → Application Settings → Master Data → Units.
2. Click Add Unit to expand the entry panel.
3. In Unit Name (mandatory), enter the name of the unit - for example, PCS.
4. In Description, optionally describe the unit - for example, Per PCS.
5. Use the Status toggle to mark the unit Active (default) or inactive.
6. Click ADD UNITS to save. The new unit appears in the List below.

View/Edit Units

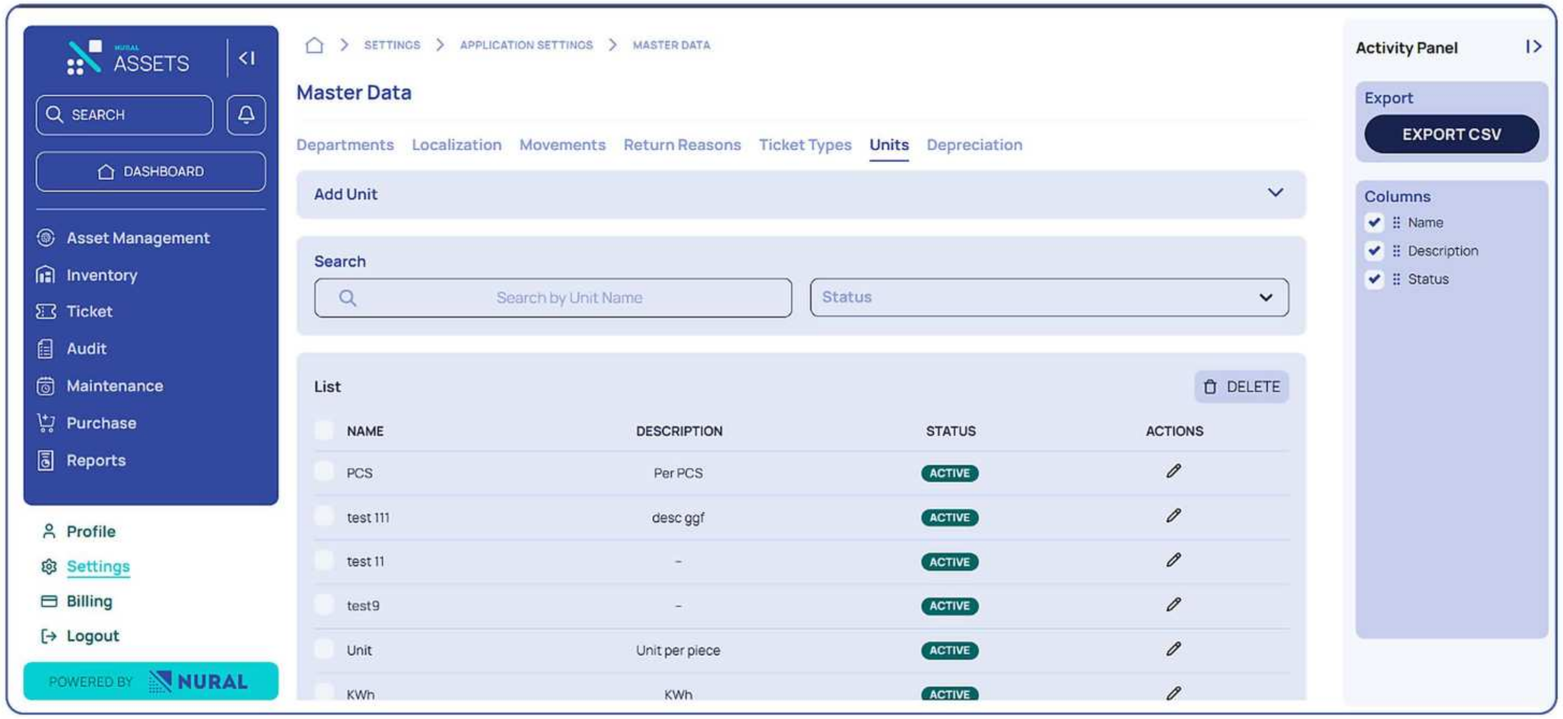


Figure 15 - View/Edit Units

STEPS

1. Go to: Settings → Application Settings → Master Data → Units. The List displays all existing units with their Description and Status.
2. To find a unit, use Search by Unit Name or the Status dropdown to filter the list.
3. To edit a unit, click the edit (pencil) icon in the Actions column of its row, update the fields, and save your changes.
4. To delete units, select the checkbox(es) beside the required rows and click Delete.
5. In the Activity Panel, use the Columns options to show or hide columns (Name, Description, Status), and click EXPORT CSV under Export to download the list as an Excel/CSV file.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to Page to go to a specific page.

Add New Depreciation Method

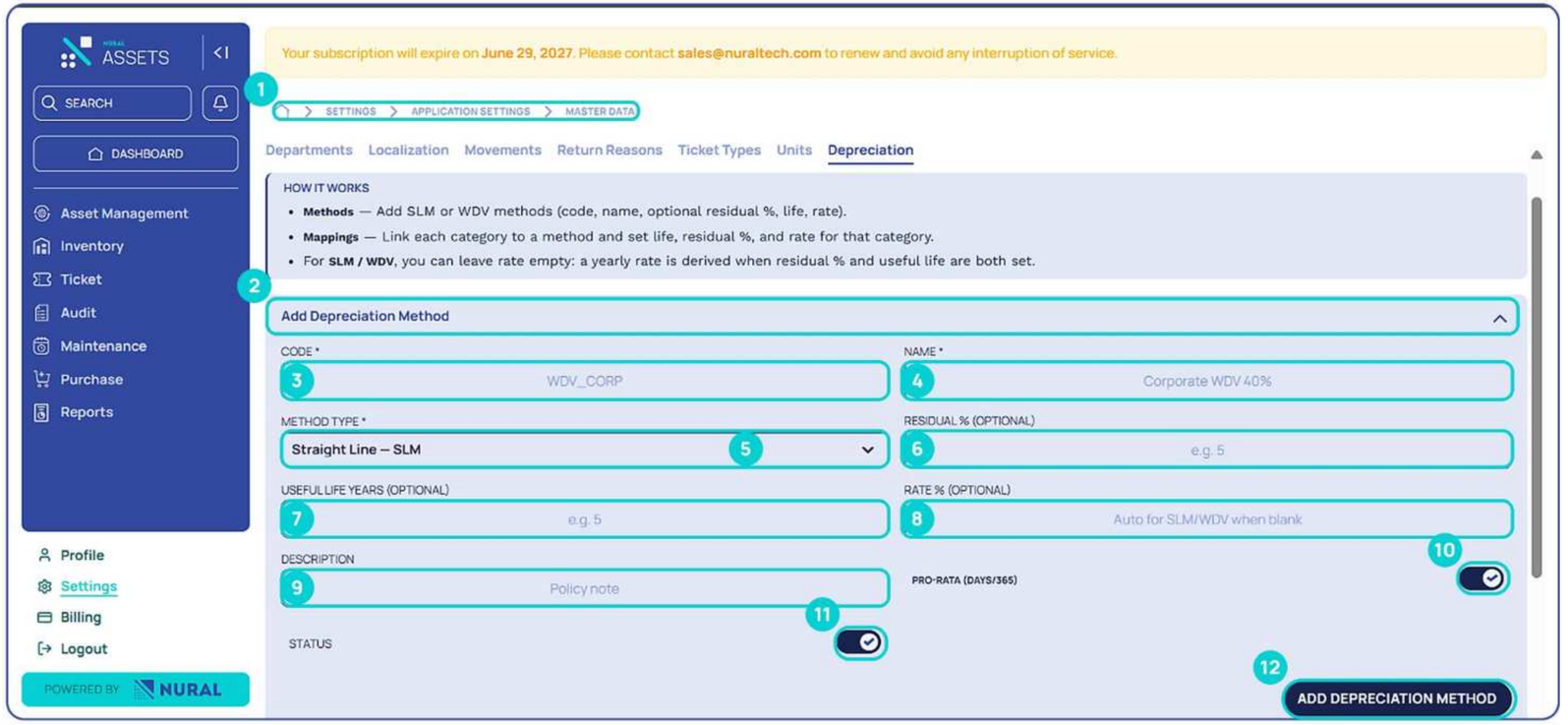


Figure 16 - Add New Depreciation Method

The Depreciation module lets you define the depreciation methods used across Nural Assets - such as Straight Line (SLM) or Written Down Value (WDV) - each with an optional residual %, useful life, and rate, and then map each asset category to a method. These are used to calculate asset depreciation across the system.

STEPS

1. Go to: Settings → Application Settings → Master Data → Depreciation.
2. Click Add Depreciation Method to expand the entry panel.
3. In Code (mandatory), enter a unique code for the method - for example, WDV_CORP.
4. In Name (mandatory), enter a name for the method - for example, Corporate WDV 40%.
5. From the Method Type dropdown (mandatory), select the type - Straight Line - SLM or Written Down Value - WDV.
6. In Residual % (optional), enter the residual value percentage - for example, 5.

Add New Depreciation Method

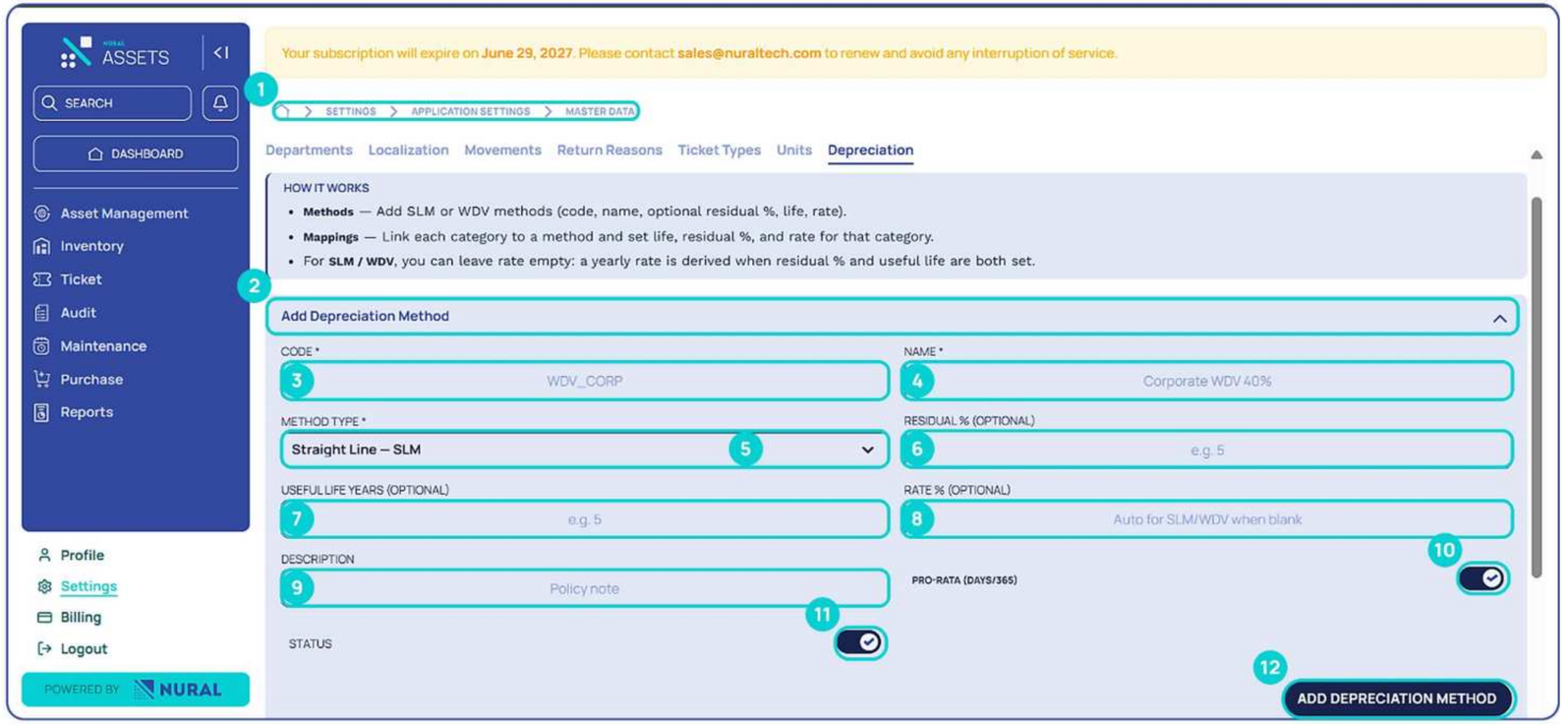


Figure 16 - Add New Depreciation Method

STEPS, CONTINUED

7. In Useful Life Years (optional), enter the useful life in years - for example, 5.
8. In Rate % (optional), enter the depreciation rate. For SLM/WDV you can leave this blank - the rate is derived automatically when Residual % and Useful Life are both set.
9. In Description, optionally add a policy note.
10. Use the Pro-Rata (Days/365) toggle to enable day-based (days/365) pro-rata depreciation.
11. Use the Status toggle to mark the method Active (default) or inactive.
12. Click ADD DEPRECIATION METHOD to save. The new method appears in the Depreciation methods list below.

View/Edit Depreciation Methods

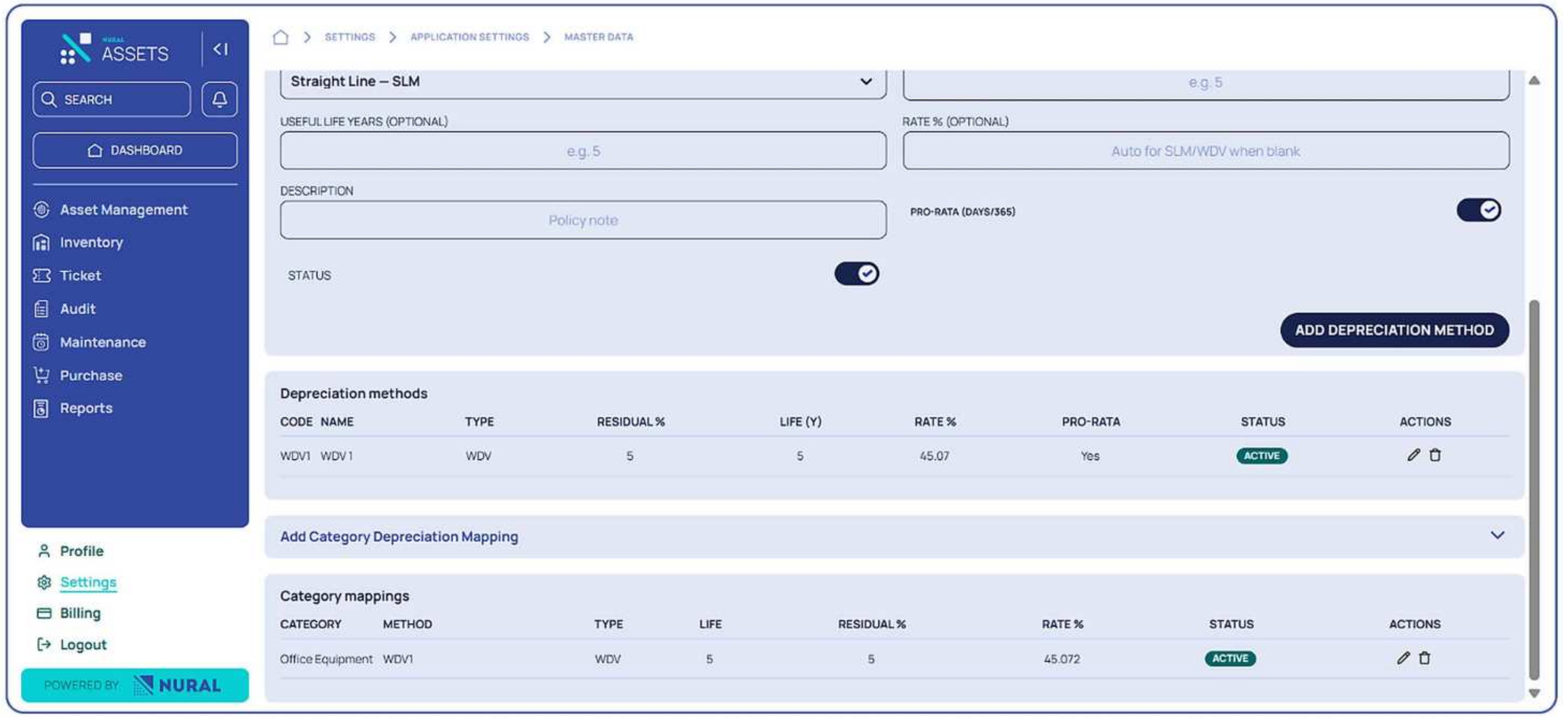


Figure 17 - View/Edit Depreciation Methods

STEPS

1. Go to: Settings → Application Settings → Master Data → Depreciation. The Depreciation methods list displays all existing methods with their Code, Name, Type, Residual %, Life (Y), Rate %, Pro-Rata, and Status.
2. To edit a method, click the edit (pencil) icon in the Actions column of its row, update the fields, and save your changes.
3. To delete a method, click the delete (trash) icon in the Actions column of its row.
4. To link an asset category to a method, expand Add Category Depreciation Mapping, select the category and method, set the Life, Residual %, and Rate %, and save. The mapping appears in the Category mappings list with its Category, Method, Type, Life, Residual %, Rate %, and Status.
5. To edit or delete a category mapping, click the edit (pencil) or delete (trash) icon in the Actions column of its row in the Category mappings list.

Notifications

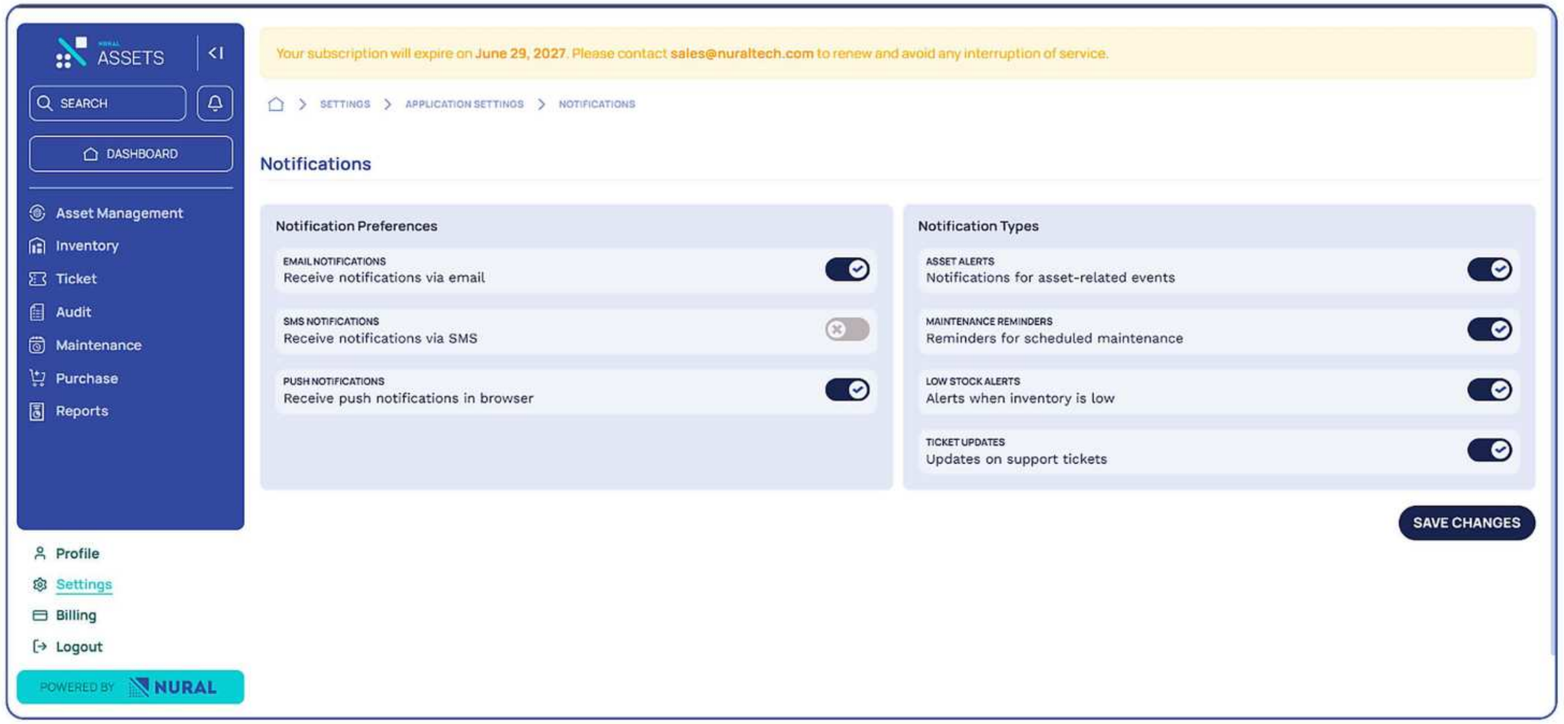


Figure 18 - Notifications

The Notifications module lets you control how Nural Assets keeps you informed - choosing the channels through which notifications are delivered and the types of events you are alerted about. Notification settings are maintained under Settings → Application Settings → Notifications and apply to your account.

STEPS

1. Go to: Settings → Application Settings → Notifications.
2. Under Notification Preferences, choose how you want to receive notifications: toggle Email Notifications to receive notifications via email, SMS Notifications to receive them via SMS, and Push Notifications to receive them in your browser.
3. Under Notification Types, choose which events you are alerted about: Asset Alerts (asset-related events), Maintenance Reminders (scheduled maintenance), Low Stock Alerts (low inventory), and Ticket Updates (support ticket updates).
4. Use each toggle to turn a preference or type on or off.
5. Click SAVE CHANGES to apply your notification settings.

Company Info



Figure 19 - Company Info

The Company Info module is where you record your organisation's core profile - its basic identification, primary contact, registered address, regional preferences, and branding. These details identify your organisation across Nural Assets and drive locale-dependent behaviour such as currency, date format, financial year, and number grouping. Company information is maintained under Settings → Company Info.

STEPS

1. Go to: Settings → Company Info.
2. Under Basic Information, enter your Organization Name (mandatory), and optionally the CIN, GSTIN / Tax ID, and PAN.
3. Under Primary Contact, enter the Primary Contact Name, Primary Contact Email, and Primary Contact Phone.
4. Under Registered Address, enter the PIN Code, select the Country, State, and City from their dropdowns, and enter Address Line 1 and Address Line 2.
5. Under Regional Settings, select the Time Zone, Locale / Default Language, Currency, Date Format, and Number Format, and optionally the Financial Year Start Month.
6. Under Branding, click Choose Logo to upload your organisation's logo (PNG, JPG, or GIF, up to 10 MB).
7. Click SAVE SETTINGS to save your company information. (To discard your changes, click CANCEL.)

Add Location



Figure 20 - Add Location

The Location module lets you define the physical or logical locations used across Nural Assets - such as offices, warehouses, or sites - and arrange them into a parent-child hierarchy. Each location captures a Name and Code, optional geo-coordinates, primary and alternate heads, and a full address, and is maintained under Settings → Organization → Location. Locations are used to track where assets are held and managed across the system.

STEPS

1. Go to: Settings → Organization → Location, then open the Create tab.
2. In Location Name (mandatory), enter a name for the location - for example, Delhi.
3. From the Parent Location dropdown, optionally select a parent location to place this location under in the hierarchy.
4. In Location Code, optionally enter a unique code for the location.
5. In Latitude and Longitude, optionally enter the location's geo-coordinates.
6. In Description, optionally describe the location.

Add Location



Figure 20 - Add Location

STEPS, CONTINUED

7. From the Primary Head and Alternate Head dropdowns, optionally select the users responsible for the location.
8. From the Country, State, and City dropdowns, select the location's geography.
9. In Address, enter the street address, and in Postal Code, enter the postal/PIN code.
10. Use the Status toggle to mark the location Active (default) or inactive.
11. Click ADD LOCATION to save. The new location appears in the List under the View tab.

View/Edit Locations

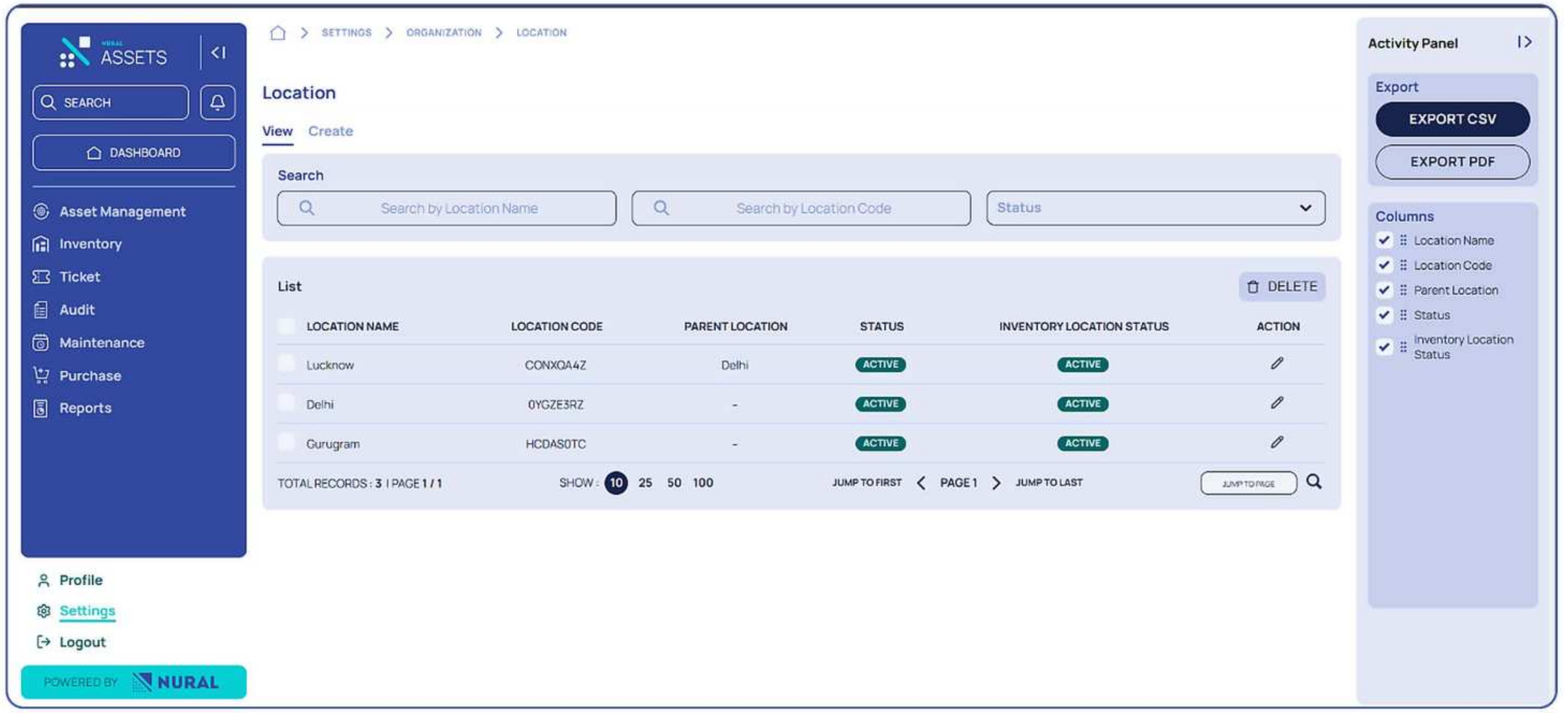


Figure 21 - View/Edit Locations

STEPS

1. Go to: Settings → Organization → Location, then open the View tab. The List displays all existing locations with their Location Code, Parent Location, Status, and Inventory Location Status.
2. To find a location, use Search by Location Name, Search by Location Code, or the Status dropdown to filter the list.
3. To edit a location, click the edit (pencil) icon in the Action column of its row, update the fields, and save your changes.
4. To delete locations, select the checkbox(es) beside the required rows and click Delete.
5. In the Activity Panel, use the Columns options to show or hide columns (Location Name, Location Code, Parent Location, Status, Inventory Location Status), and under Export click EXPORT CSV or EXPORT PDF to download the list.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

Create Workflow

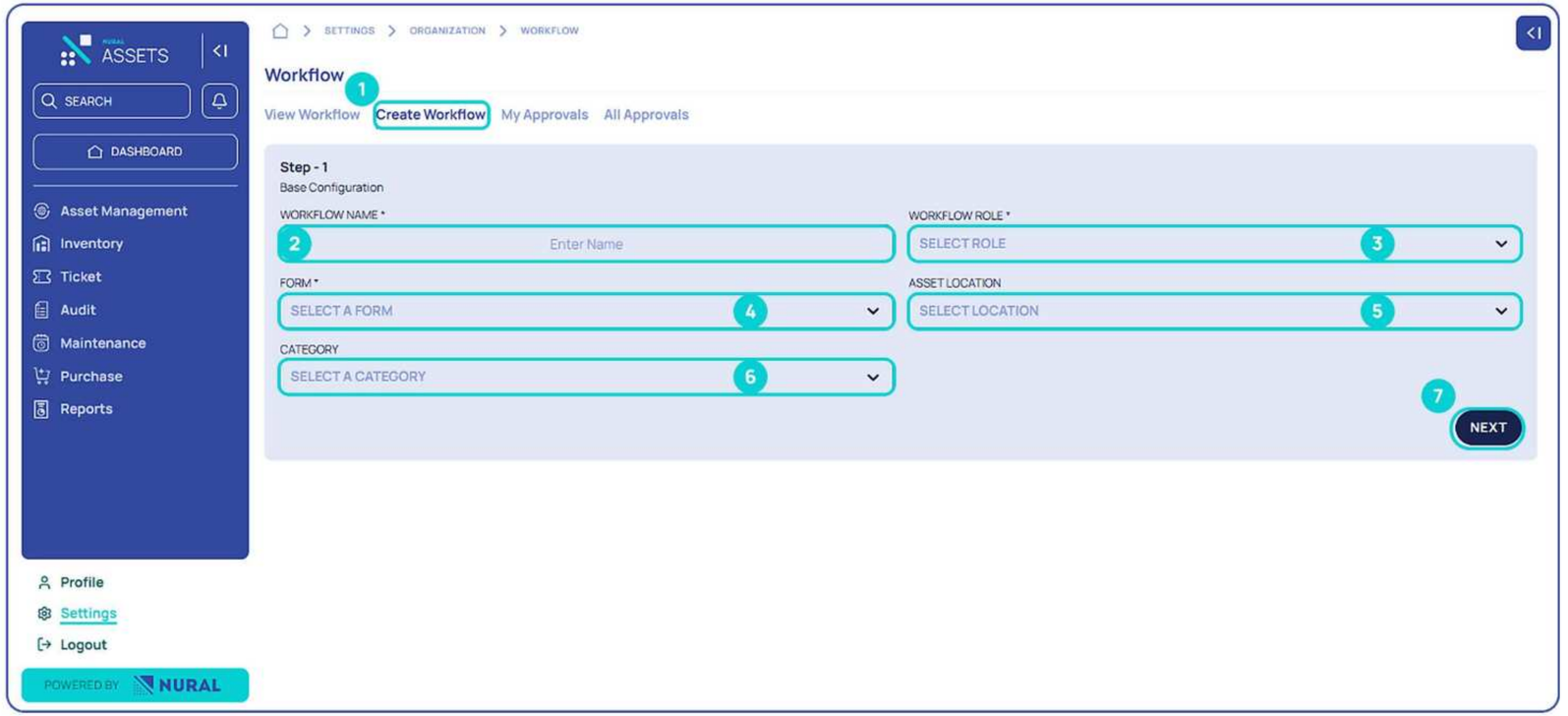


Figure 22 - Create Workflow

The Workflow module lets you define approval workflows for asset requests in Nural Assets - specifying which role approves a given form, location, and category - and then track and act on the resulting approval requests. Workflows are maintained under Settings → Organization → Workflow, which provides four tabs: View Workflow, Create Workflow, My Approvals, and All Approvals.

STEPS

1. Go to: Settings → Organization → Workflow, then open the Create Workflow tab.
2. In Step 1 - Base Configuration, enter a name for the workflow in Workflow Name (mandatory).
3. From the Workflow Role dropdown (mandatory), select the role that will approve requests under this workflow.
4. From the Form dropdown (mandatory), select the form the workflow applies to.
5. From the Asset Location dropdown, optionally select the location the workflow applies to.
6. From the Category dropdown, optionally select the asset category the workflow applies to.
7. Click NEXT to proceed to the next step and complete the remaining workflow configuration.

View Workflow

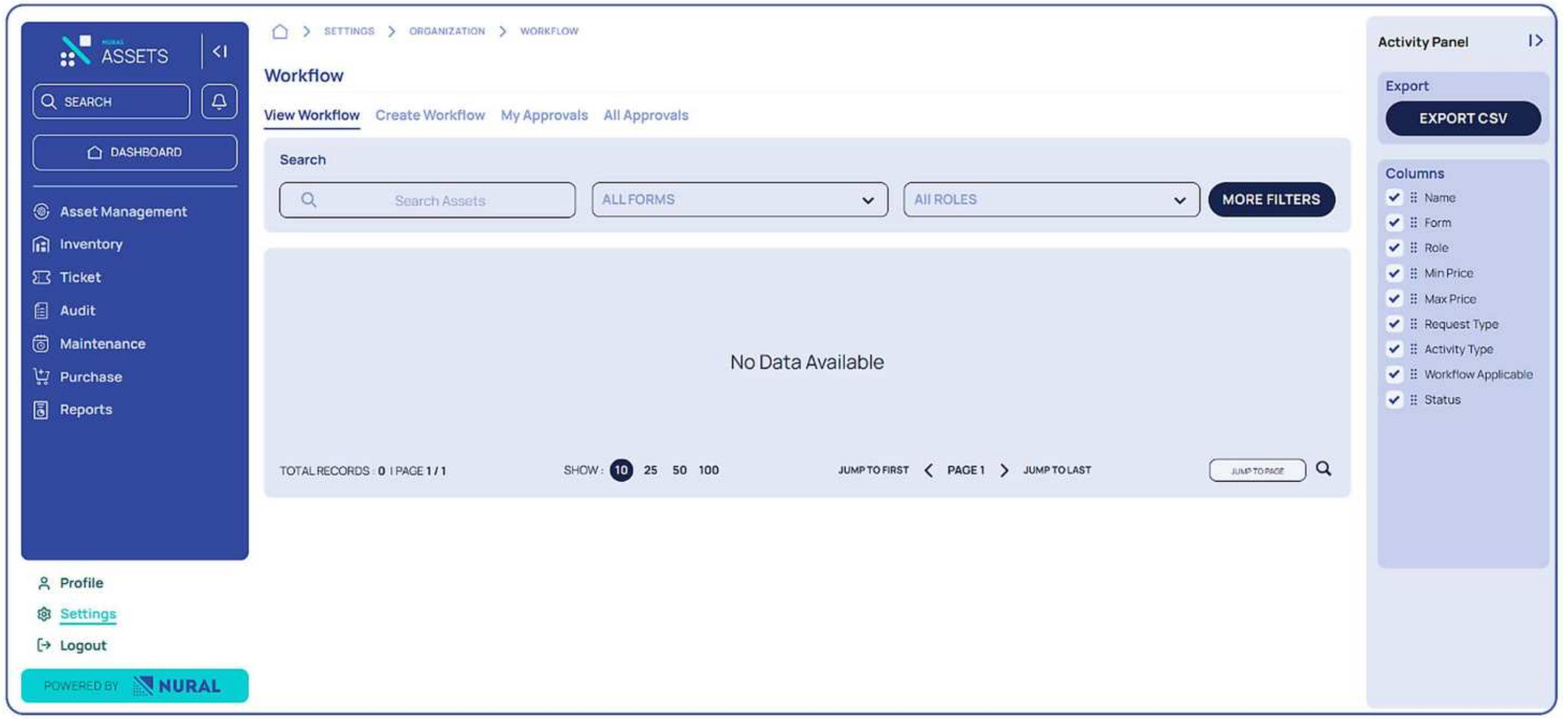


Figure 23 - View Workflow

STEPS

1. Go to: Settings → Organization → Workflow, then open the View Workflow tab. The List displays all existing workflows with their Name, Form, Role, Min Price, Max Price, Request Type, Activity Type, Workflow Applicable, and Status.
2. To find a workflow, use Search Assets, the All Forms dropdown, or the All Roles dropdown, or click More Filters for additional filter options.
3. To edit a workflow, click the edit (pencil) icon in the Action column of its row, update the configuration, and save your changes.
4. In the Activity Panel, use the Columns options to show or hide columns (Name, Form, Role, Min Price, Max Price, Request Type, Activity Type, Workflow Applicable, Status), and click EXPORT CSV under Export to download the list.
5. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

My Approvals

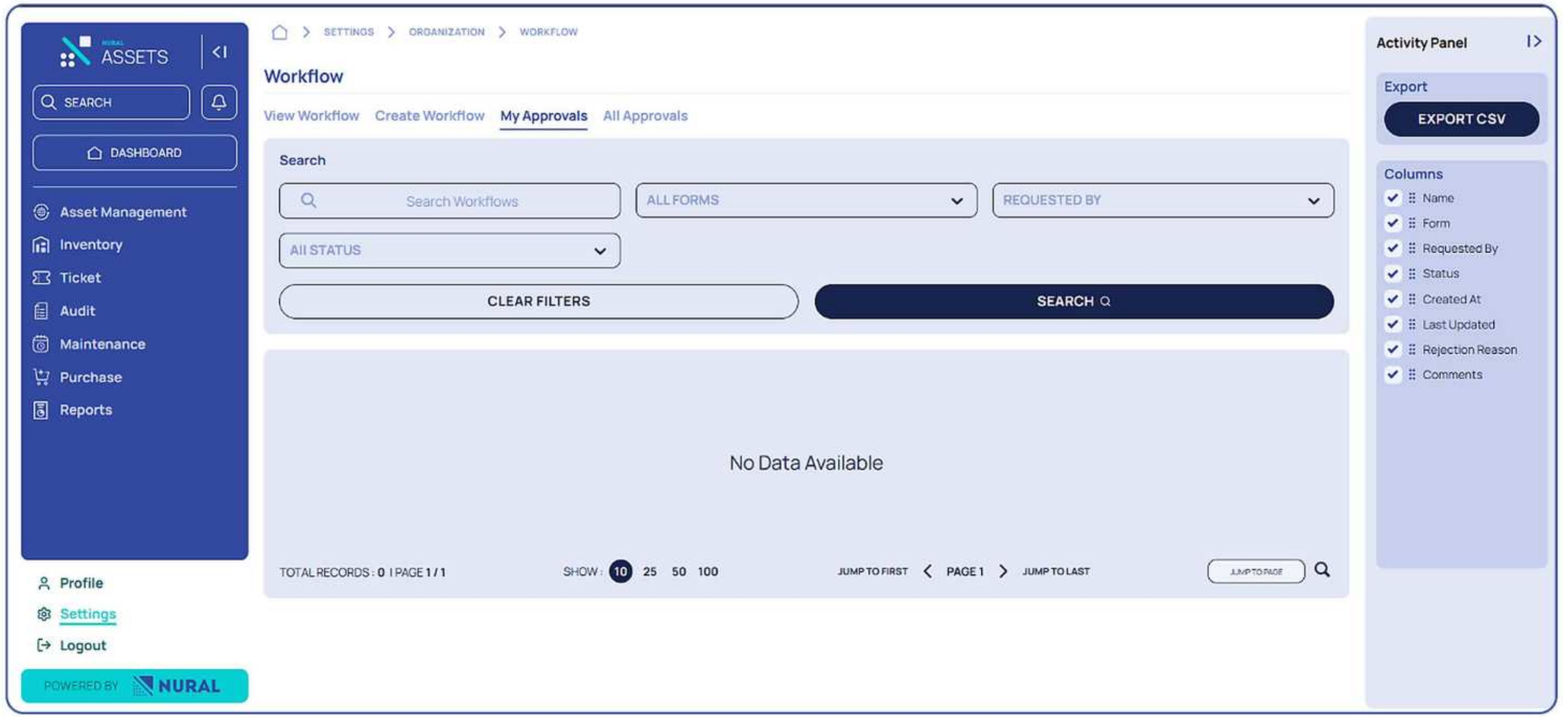


Figure 24 - My Approvals

STEPS

1. Go to: Settings → Organization → Workflow, then open the My Approvals tab. The List displays the workflow approval requests assigned to you, with their Name, Form, Requested By, Status, Created At, Last Updated, Rejection Reason, and Comments.
2. To find a request, use Search Workflows, the All Forms dropdown, the Requested By dropdown, or the All Status dropdown, then click SEARCH. Click CLEAR FILTERS to reset the filters.
3. Review each request and act on it - approve or reject - from the Action column, adding a comment or rejection reason where required.
4. In the Activity Panel, use the Columns options to show or hide columns (Name, Form, Requested By, Status, Created At, Last Updated, Rejection Reason, Comments), and click EXPORT CSV under Export to download the list.
5. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

All Approvals

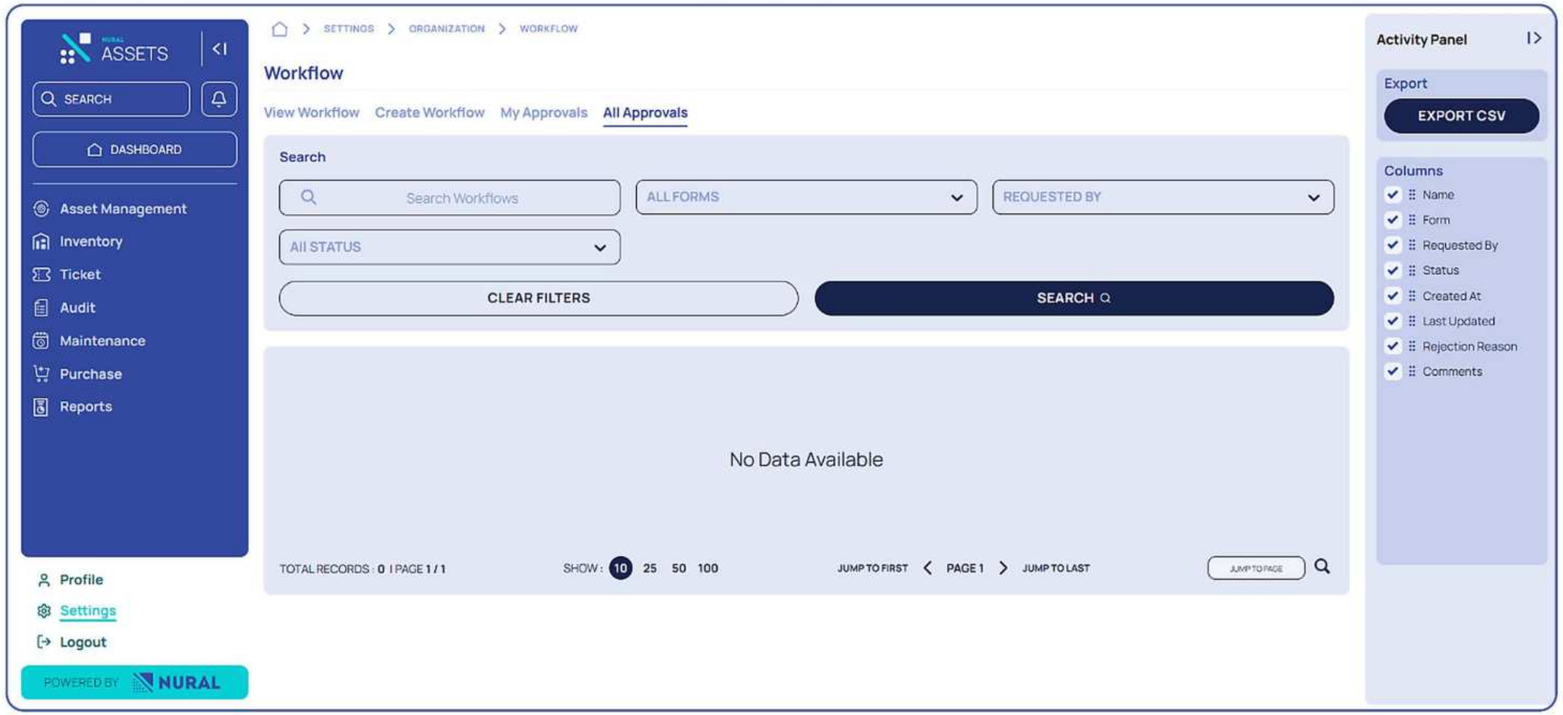


Figure 25 - All Approvals

STEPS

1. Go to: Settings → Organization → Workflow, then open the All Approvals tab. The List displays all workflow approval requests across users, with their Name, Form, Requested By, Status, Created At, Last Updated, Rejection Reason, and Comments.
2. To find a request, use Search Workflows, the All Forms dropdown, the Requested By dropdown, or the All Status dropdown, then click SEARCH. Click CLEAR FILTERS to reset the filters.
3. Review the status and history of any approval request, including its Rejection Reason and Comments.
4. In the Activity Panel, use the Columns options to show or hide columns (Name, Form, Requested By, Status, Created At, Last Updated, Rejection Reason, Comments), and click EXPORT CSV under Export to download the list.
5. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

Security

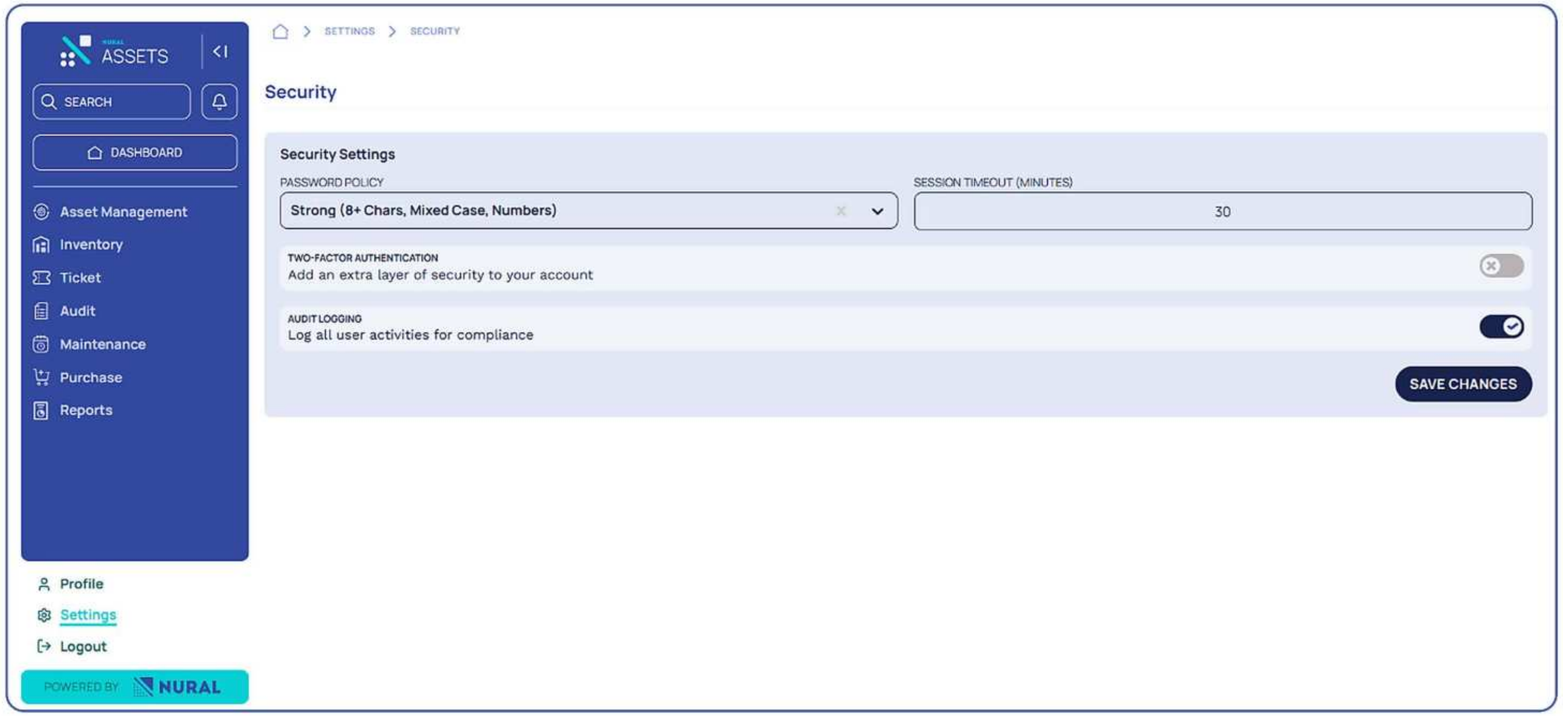


Figure 26 - Security

The Security module is where you configure account and access security for Nural Assets - the password policy, session timeout, two-factor authentication, and audit logging. These settings help protect your data and support compliance requirements. Security settings are maintained under Settings → Security.

STEPS

1. Go to: Settings → Security.
2. Under Security Settings, from the Password Policy dropdown, select the password strength requirement - for example, Strong (8+ characters, mixed case, numbers).
3. In Session Timeout (Minutes), enter the number of minutes of inactivity after which users are automatically logged out - for example, 30.
4. Use the Two-Factor Authentication toggle to enable or disable an extra layer of security at login.
5. Use the Audit Logging toggle to enable or disable logging of all user activities for compliance.
6. Click SAVE CHANGES to apply your security settings.

Add Vendor

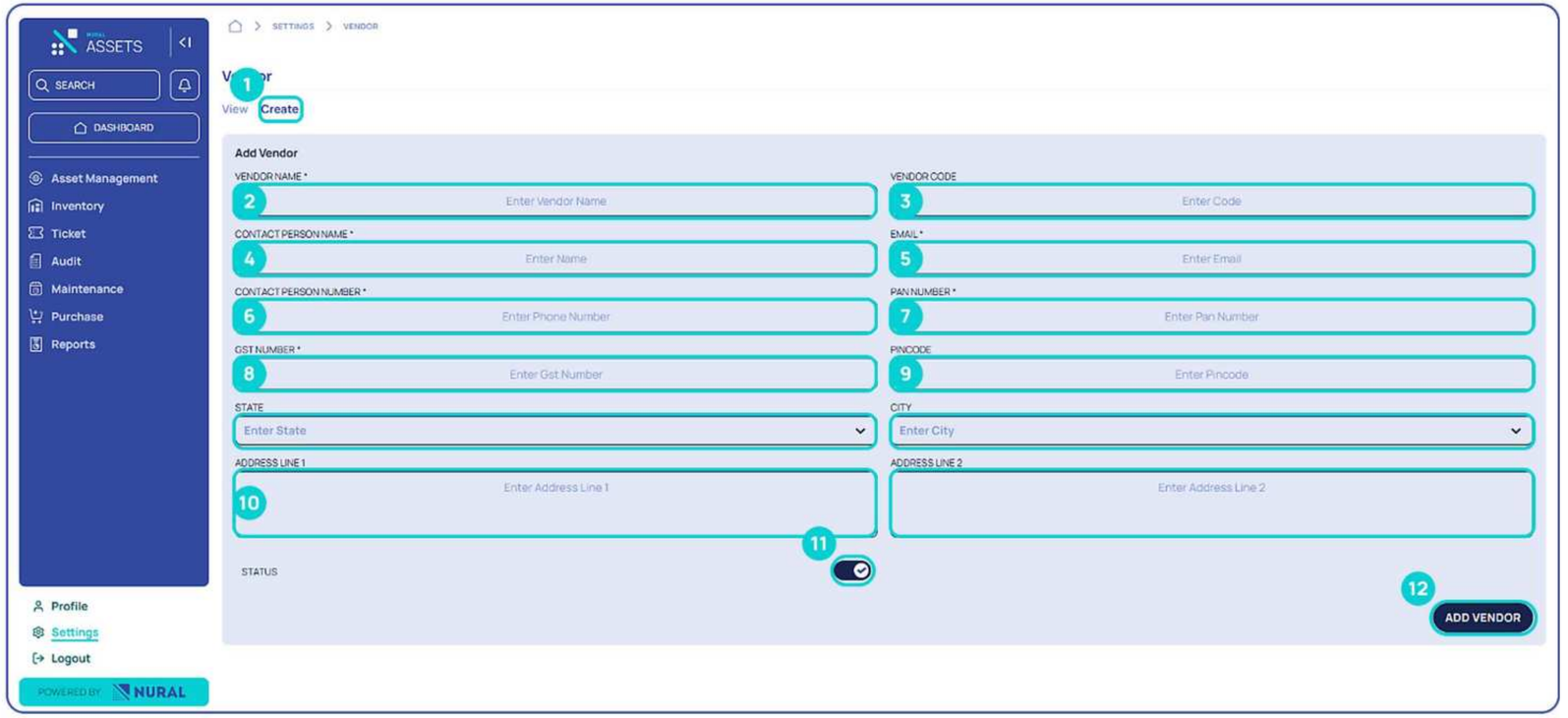


Figure 27 - Add Vendor

The Vendor Management module lets you maintain the vendors you procure assets and services from in Nural Assets - capturing each vendor's contact person, tax identifiers (PAN and GST), and address. Vendors are maintained under Settings → Vendor, which provides View and Create tabs, and are used across purchase and asset records.

STEPS

1. Go to: Settings → Vendor, then open the Create tab.
2. In Vendor Name (mandatory), enter the vendor's name.
3. In Vendor Code, optionally enter a unique code for the vendor.
4. In Contact Person Name (mandatory), enter the name of the vendor's contact person.
5. In Email (mandatory), enter the contact person's email address.
6. In Contact Person Number (mandatory), enter the contact person's phone number.

Add Vendor

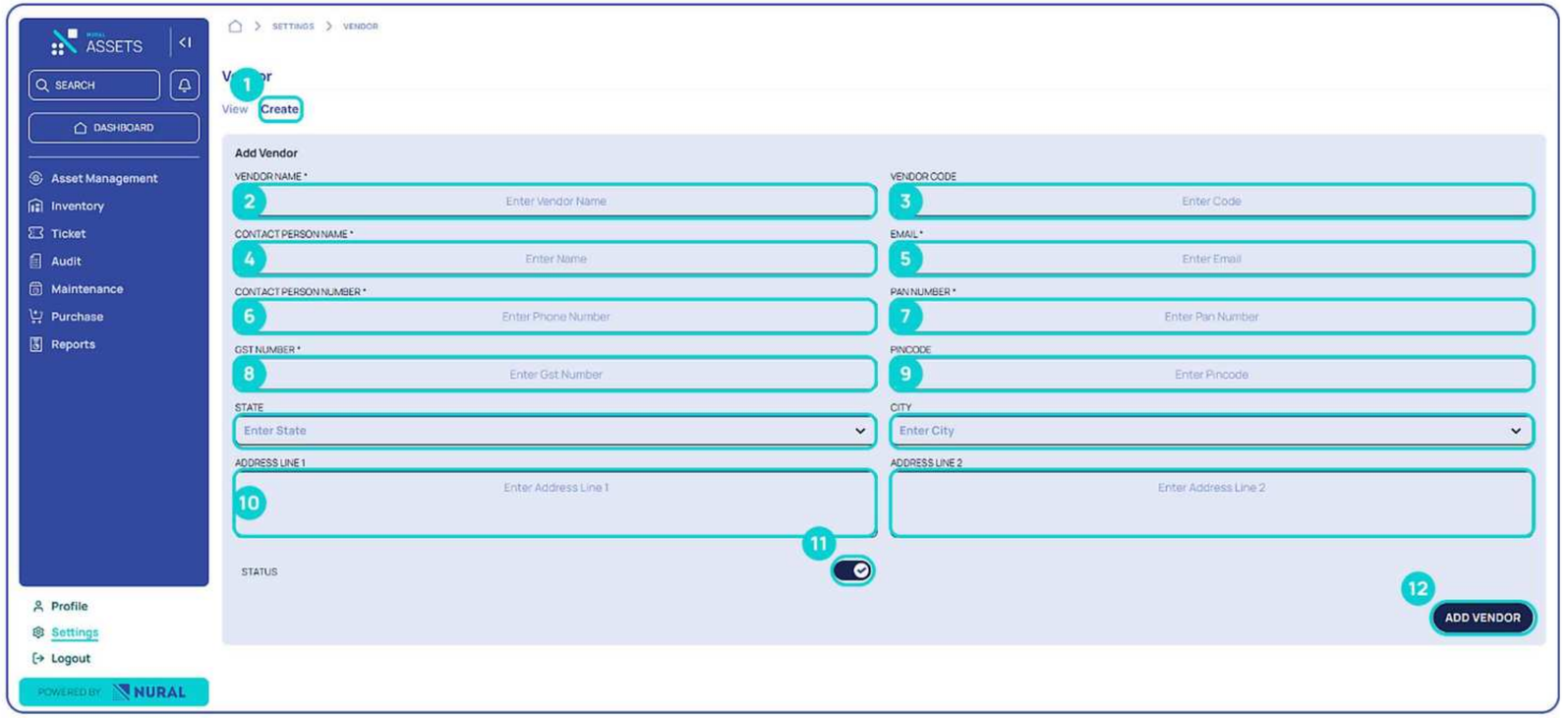


Figure 27 - Add Vendor

STEPS, CONTINUED

7. In PAN Number (mandatory), enter the vendor's PAN.
8. In GST Number (mandatory), enter the vendor's GSTIN.
9. In Pincode, enter the vendor's PIN code, then select the State and City from their dropdowns.
10. In Address Line 1 and Address Line 2, enter the vendor's address.
11. Use the Status toggle to mark the vendor Active (default) or inactive.
12. Click ADD VENDOR to save. The new vendor appears in the List under the View tab.

View/Edit Vendors

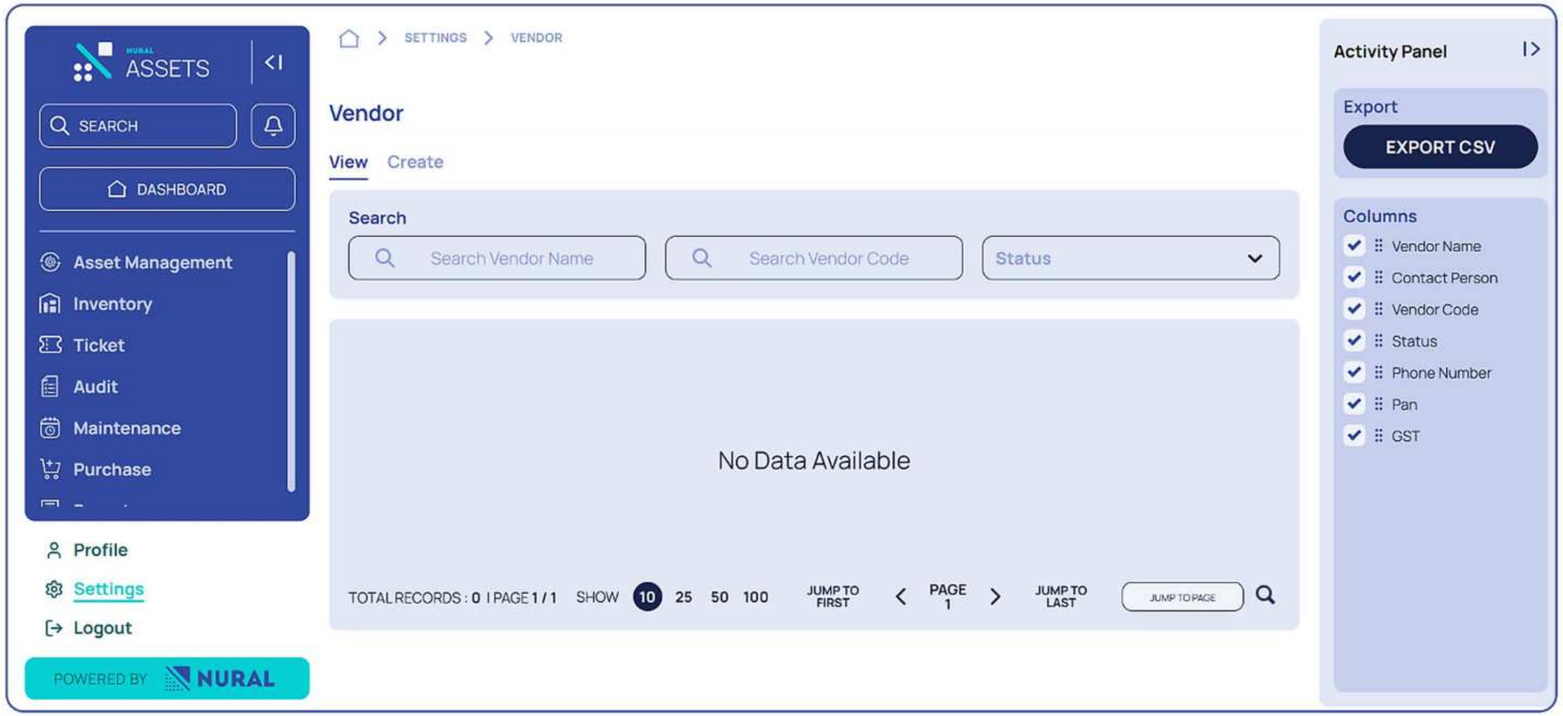


Figure 28 - View/Edit Vendors

STEPS

1. Go to: Settings → Vendor, then open the View tab. The List displays all existing vendors with their Vendor Name, Contact Person, Vendor Code, Status, Phone Number, PAN, and GST.
2. To find a vendor, use Search Vendor Name, Search Vendor Code, or the Status dropdown to filter the list.
3. To edit a vendor, click the edit (pencil) icon in the Action column of its row, update the fields, and save your changes.
4. In the Activity Panel, use the Columns options to show or hide columns (Vendor Name, Contact Person, Vendor Code, Status, Phone Number, PAN, GST), and click EXPORT CSV under Export to download the list.
5. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

Create Meter Type



Figure 29 - Create Meter Type

The Meter module lets you define the meter types used to track utility and asset consumption in Nural Assets - such as electricity, water, or gas meters - each linked to a unit of measure. Meter types are maintained under Settings → Utility → Meter, which provides View and Create Meter tabs, and are used when recording meter readings across the system.

STEPS

1. Go to: Settings → Utility → Meter, then open the Create Meter tab.
2. In Meter Type Name (mandatory), enter a name for the meter type - for example, Electricity.
3. From the Unit dropdown (mandatory), select the unit of measure for the meter type - for example, KWh.
4. In Description, optionally describe the meter type.
5. Use the Status toggle to mark the meter type Active (default) or inactive.
6. Click CREATE METER TYPE to save. The new meter type appears in the List under the View tab.

View/Edit Meter Types

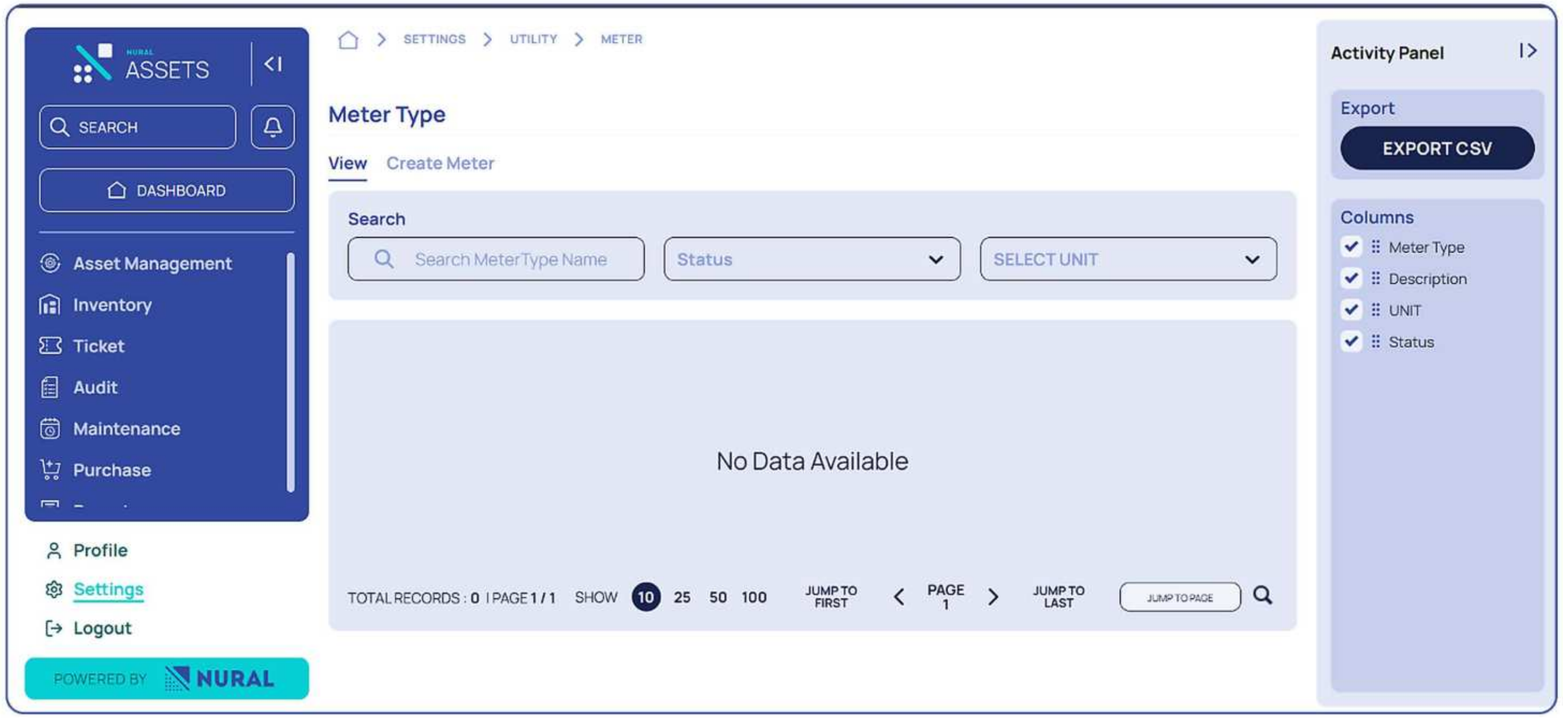


Figure 30 - View/Edit Meter Types

STEPS

1. Go to: Settings → Utility → Meter, then open the View tab. The List displays all existing meter types with their Meter Type, Description, Unit, and Status.
2. To find a meter type, use Search MeterType Name, the Status dropdown, or the Select Unit dropdown to filter the list.
3. To edit a meter type, click the edit (pencil) icon in the Action column of its row, update the fields, and save your changes.
4. In the Activity Panel, use the Columns options to show or hide columns (Meter Type, Description, Unit, Status), and click EXPORT CSV under Export to download the list.
5. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

View Form Templates

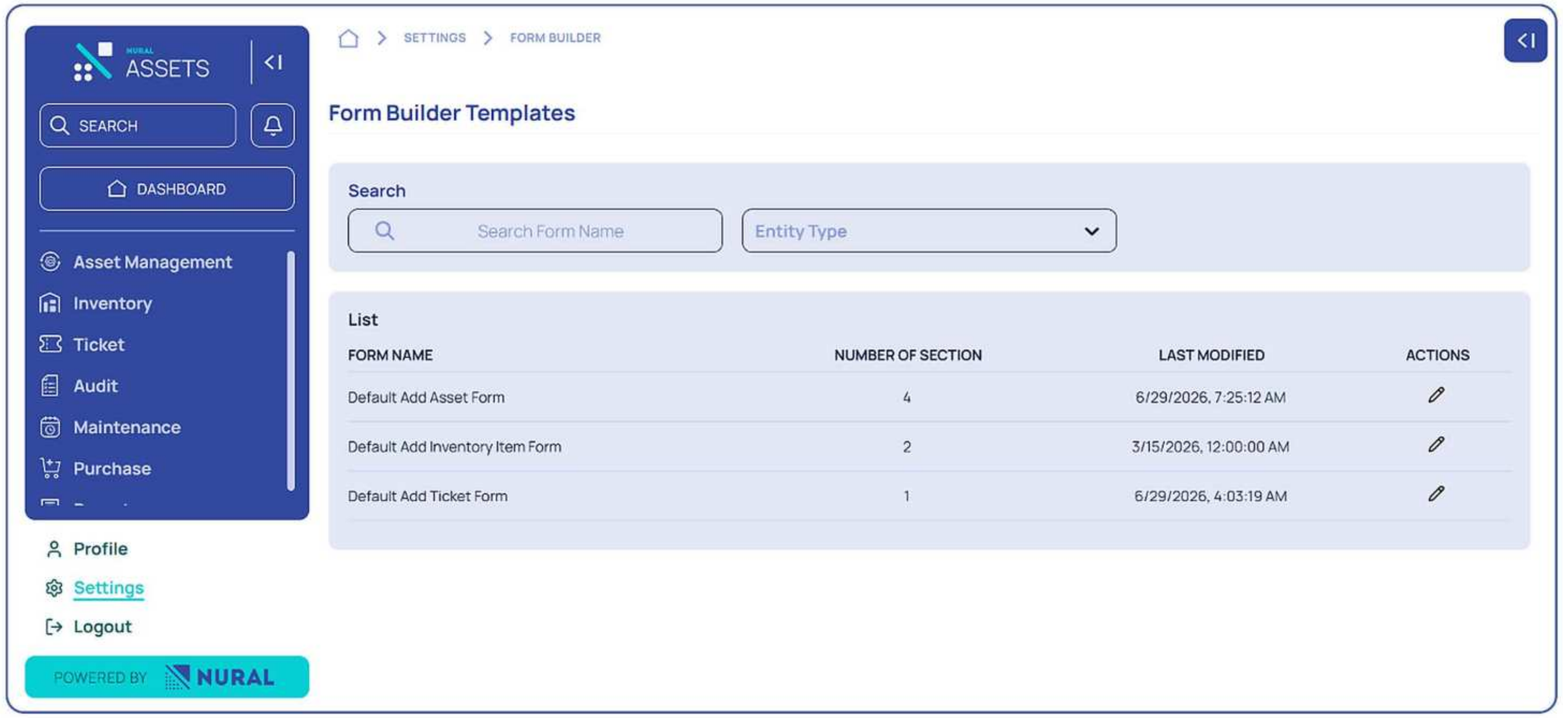


Figure 31 - View Form Templates

The Form Builder module lets you customise the Add forms for the three core entities in Nural Assets - Asset, Inventory Item, and Ticket - so you can add, remove, reorder, and configure the fields captured when creating each record. Form templates are maintained under Settings → Form Builder, where each template is organised into sections and fields. Changes saved here apply dynamically to the corresponding Add form across the system.

STEPS

1. Go to: Settings → Form Builder. The List displays the available form templates - Default Add Asset Form, Default Add Inventory Item Form, and Default Add Ticket Form - with their Form Name, Number of Section, Last Modified date, and Actions.
2. To find a template, use Search by Form Name or the Entity Type dropdown to filter the list.
3. To customise a template, click the edit (pencil) icon in the Actions column of its row to open it in the form editor.

Edit a Form Template

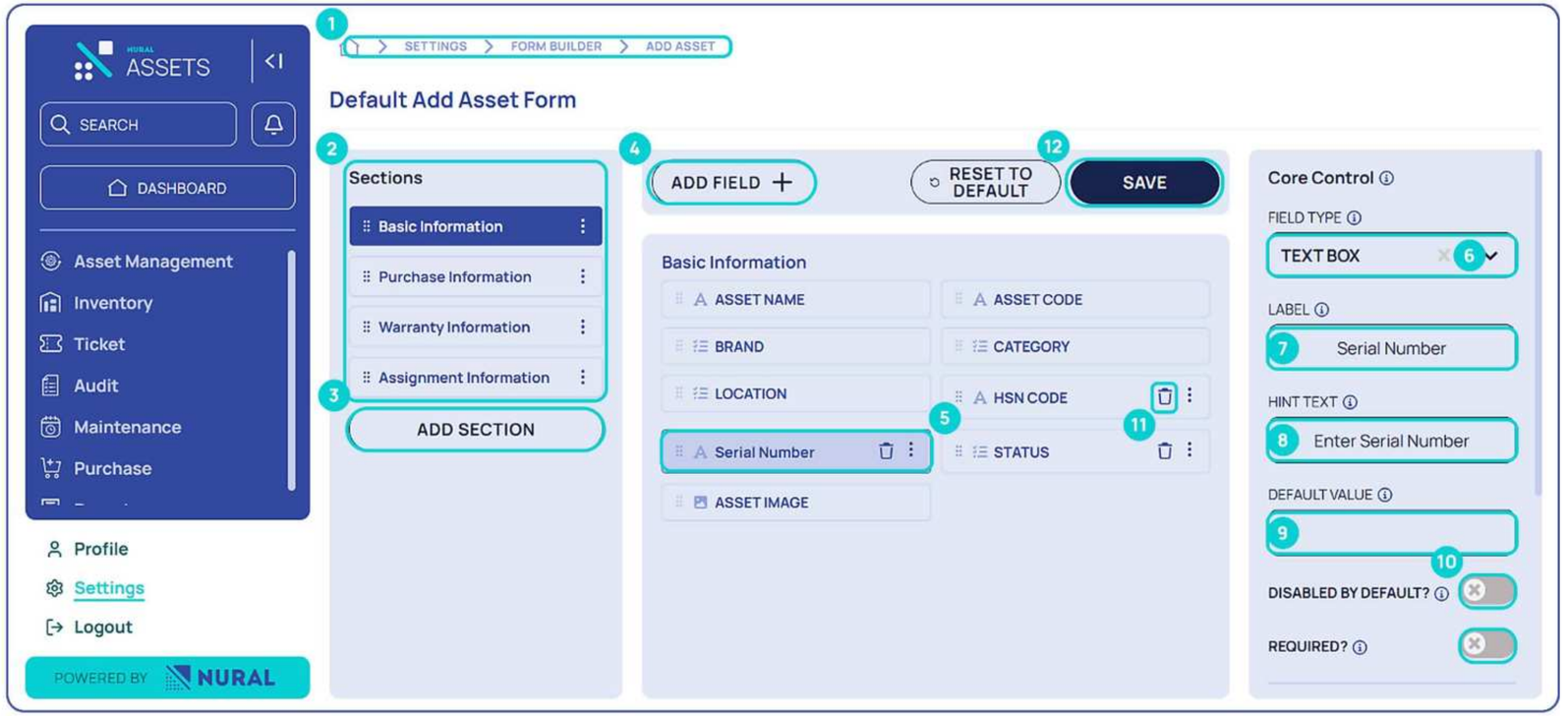


Figure 32 - Edit a Form Template

STEPS

1. Go to: Settings → Form Builder and click the edit (pencil) icon of the template you want to customise - for example, Default Add Asset Form. The form editor opens, showing the Sections panel on the left, the selected section's fields in the centre, and the Core Control panel on the right.
2. In the Sections panel, click a section to display its fields in the centre. The Default Add Asset Form is organised into Basic Information, Purchase Information, Warranty Information, and Assignment Information.
3. To add a section, click ADD SECTION and enter its name. To reorder sections, drag a section by its handle; to rename or delete a section, use its three-dot menu.
4. To add a field to the selected section, click ADD FIELD. The new field is added to the section and can then be configured.
5. Click a field to select it - its settings open in the Core Control panel on the right. Each field shows an icon for its type (text, dropdown, or image).
6. In Core Control, from the Field Type dropdown, select the field's input type - for example, Text Box.

Edit a Form Template

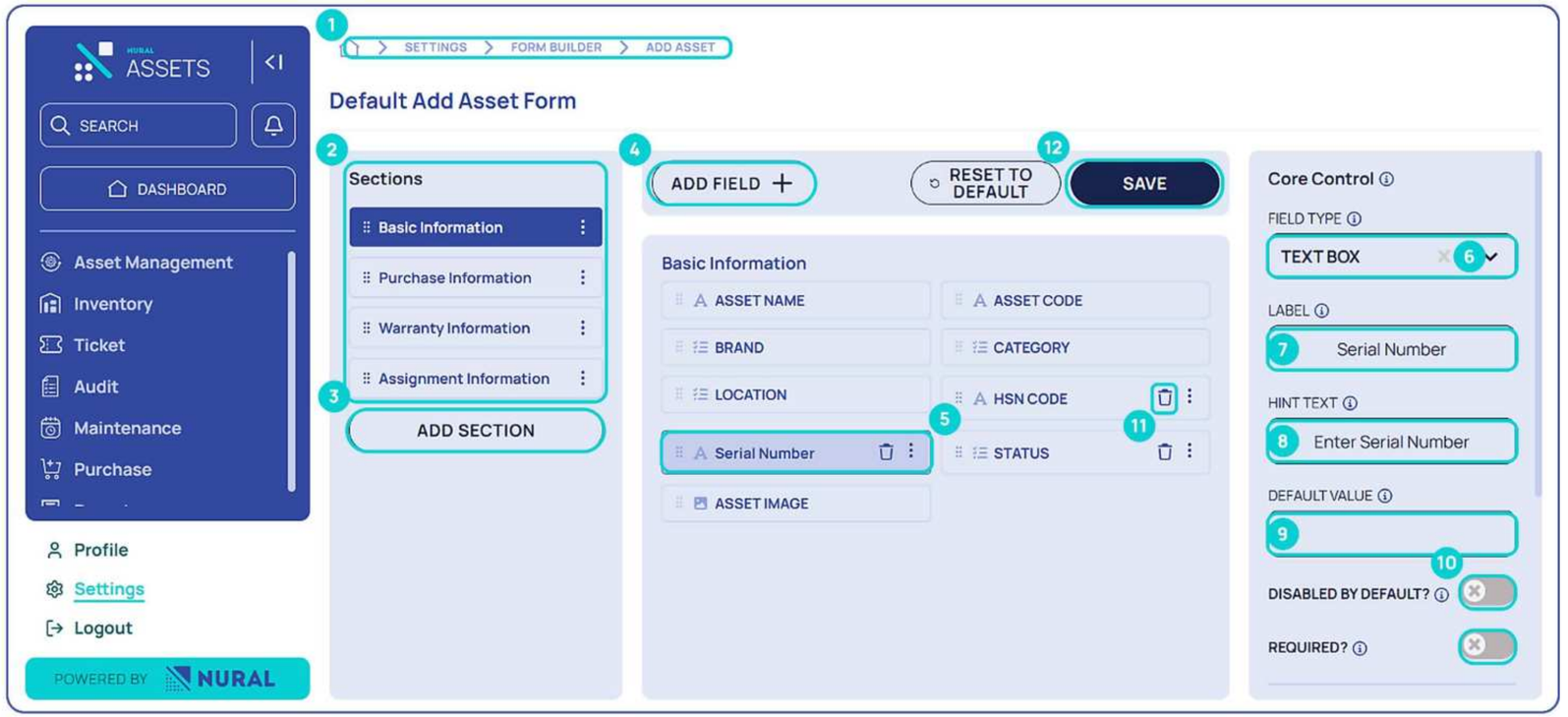


Figure 32 - Edit a Form Template

STEPS, CONTINUED

7. In Label, enter the field's on-screen label - for example, Serial Number.
8. In Hint Text, enter the placeholder text shown inside the empty field - for example, Enter Serial Number.
9. In Default Value, optionally enter a value that is pre-filled when the form opens.
10. Use the Disabled by Default? toggle to make the field read-only, and the Required? toggle to make it mandatory on the Add form.
11. To reorder fields within a section, drag a field by its handle. To remove a field, click the delete (trash) icon on it. Core fields that have no delete icon cannot be removed.
12. Click SAVE to apply your changes; the updated sections and fields appear on the corresponding Add form across the system. To restore the template to its original configuration, click RESET TO DEFAULT.

Add Brand

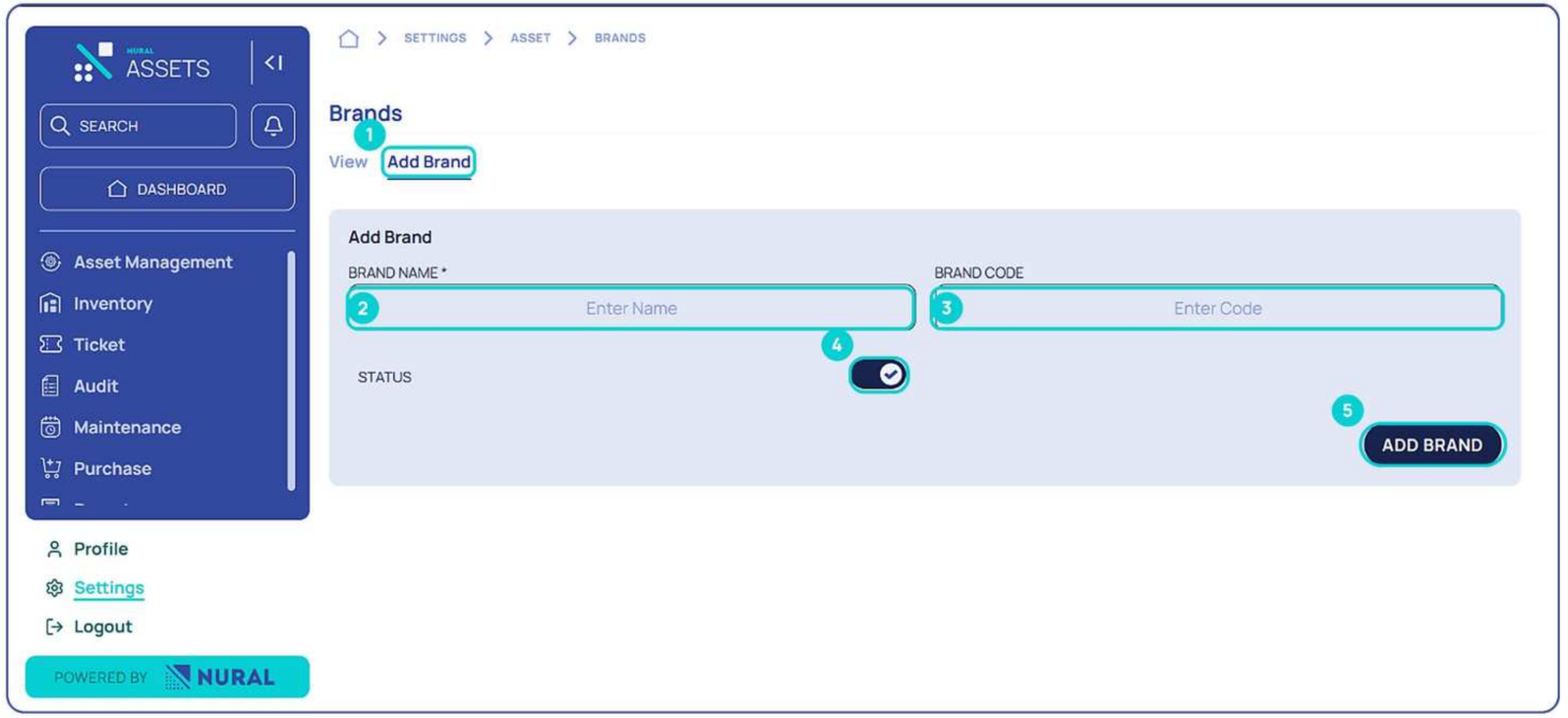


Figure 33 - Add Brand

The Brand module lets you maintain the brands of assets in Nural Assets - for example, Samsung, Dell, or Apple - each defined by a Brand Name and an optional Brand Code, with an Active or inactive status. Brands are maintained under Settings → Asset → Brands, which provides View and Add Brand tabs, and are used to classify assets by brand across the system.

STEPS

1. Go to: Settings → Asset → Brands, then open the Add Brand tab.
2. In Brand Name (mandatory), enter the name of the brand - for example, Samsung.
3. In Brand Code, optionally enter a unique code for the brand.
4. Use the Status toggle to mark the brand Active (default) or inactive.
5. Click ADD BRAND to save. The new brand appears in the List under the View tab.

View/Edit Brands

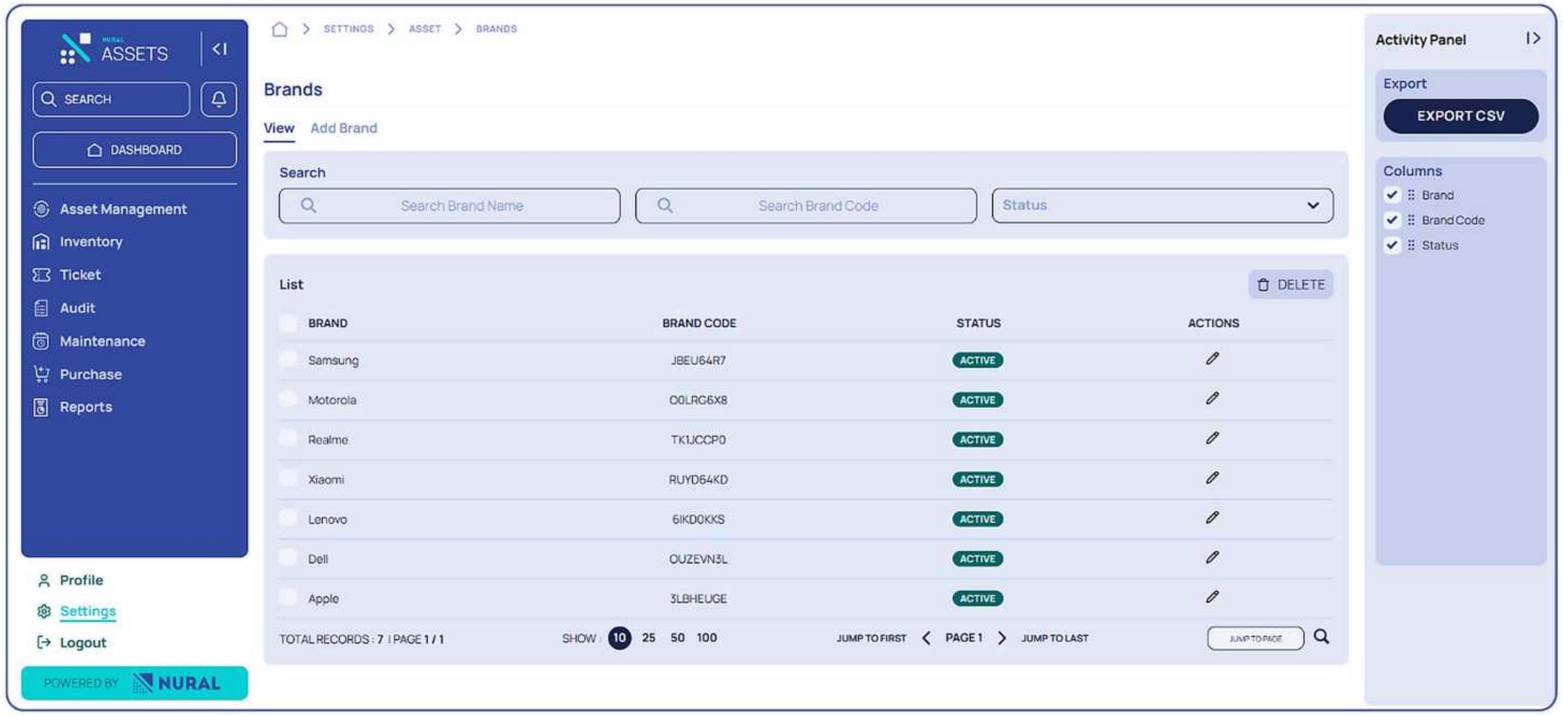


Figure 34 - View/Edit Brands

STEPS

1. Go to: Settings → Asset → Brands, then open the View tab. The List displays all existing brands with their Brand Code and Status.
2. To find a brand, use Search Brand Name, Search Brand Code, or the Status dropdown to filter the list.
3. To edit a brand, click the edit (pencil) icon in the Actions column of its row, update the fields, and save your changes.
4. To delete brands, select the checkbox(es) beside the required rows and click Delete.
5. In the Activity Panel, use the Columns options to show or hide columns (Brand, Brand Code, Status), and click EXPORT CSV under Export to download the list.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

Add New Category



Figure 35 - Add New Category

The Category module lets you classify assets into logical groups - such as Laptop, Networking, or Heavy Duty - and arrange them into a parent-child hierarchy. Each category captures a Name, an auto-generated Code, an optional Description, an optional Parent Category, and a Status, and is maintained under Settings → Asset → Category. Categories are used to organise and report on assets across the system.

STEPS

1. Go to: Settings → Asset → Category, then open the Create Category tab.
2. In Category Name (mandatory), enter a name for the category - for example, Laptop.
3. The Category Code is generated automatically and cannot be edited.
4. In Category Description, optionally describe the category.
5. From the Parent Category dropdown, optionally select a parent category to place this category under in the hierarchy.
6. Use the Status toggle to mark the category Active (default) or inactive.
7. Click ADD CATEGORY to save. The new category appears in the List under the View tab.

View/Edit Categories

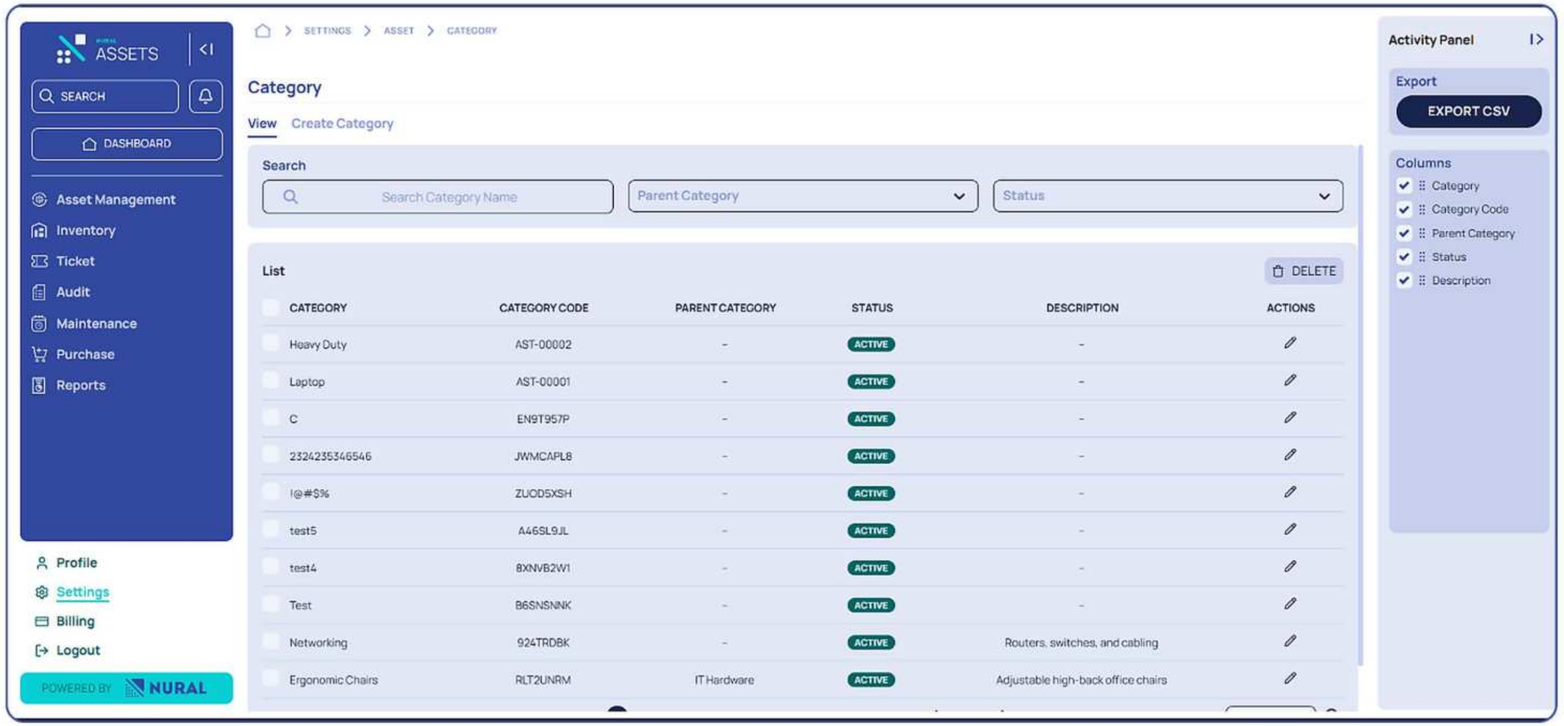


Figure 36 - View/Edit Categories

STEPS

1. Go to: Settings → Asset → Category. The List displays all existing categories with their Category, Category Code, Parent Category, Status, and Description.
2. To find a category, use Search Category Name, or filter the list by the Parent Category and Status dropdowns.
3. To edit a category, click the edit (pencil) icon in the Actions column of its row, update the fields, and save your changes.
4. To delete categories, select the checkbox(es) beside the required rows and click Delete.
5. In the Activity Panel, use the Columns options to show or hide columns (Category, Category Code, Parent Category, Status, Description), and click EXPORT CSV under Export to download the list as an Excel/CSV file.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to Page to go to a specific page.

Add Code Format



Figure 37 - Add Code Format

The Code Formats module lets you define how record codes are automatically generated for each module - such as Asset, Ticket, Audit, Inventory, Category, and Brand. Each format combines an optional Prefix, one or more Included fields (for example Department, Location, or Category), and an auto-incrementing Running Number, joined by a Separator, and can be previewed before saving. Code formats are maintained under Settings → Asset → Code Formats.

STEPS

1. Go to: Settings → Asset → Code Formats, then open the Add Code Format tab.
2. From the Module dropdown (mandatory), select the module the code format applies to - for example, Asset or Ticket.
3. From the Include dropdown, optionally select the field(s) to embed in the code, such as Department, Location, or Category.
4. From the Running Number dropdown (mandatory), select the number of digits for the auto-incrementing running number - for example, 5 digits.
5. In Starting Number, optionally enter the number the running sequence should begin from - for example, 1.

Add Code Format



Figure 37 - Add Code Format

STEPS, CONTINUED

6. In Prefix, optionally enter a prefix for the code - for example, AST or PO.
7. Review the Code Preview (read-only), which shows a live preview of the resulting code format.
8. From the Separator dropdown (mandatory), select the character used to join the parts of the code.
9. Use the Status toggle to mark the code format Active (default) or inactive.
10. Click ADD CODE FORMAT to save. The new code format appears in the List under the View tab.

View/Edit Code Formats

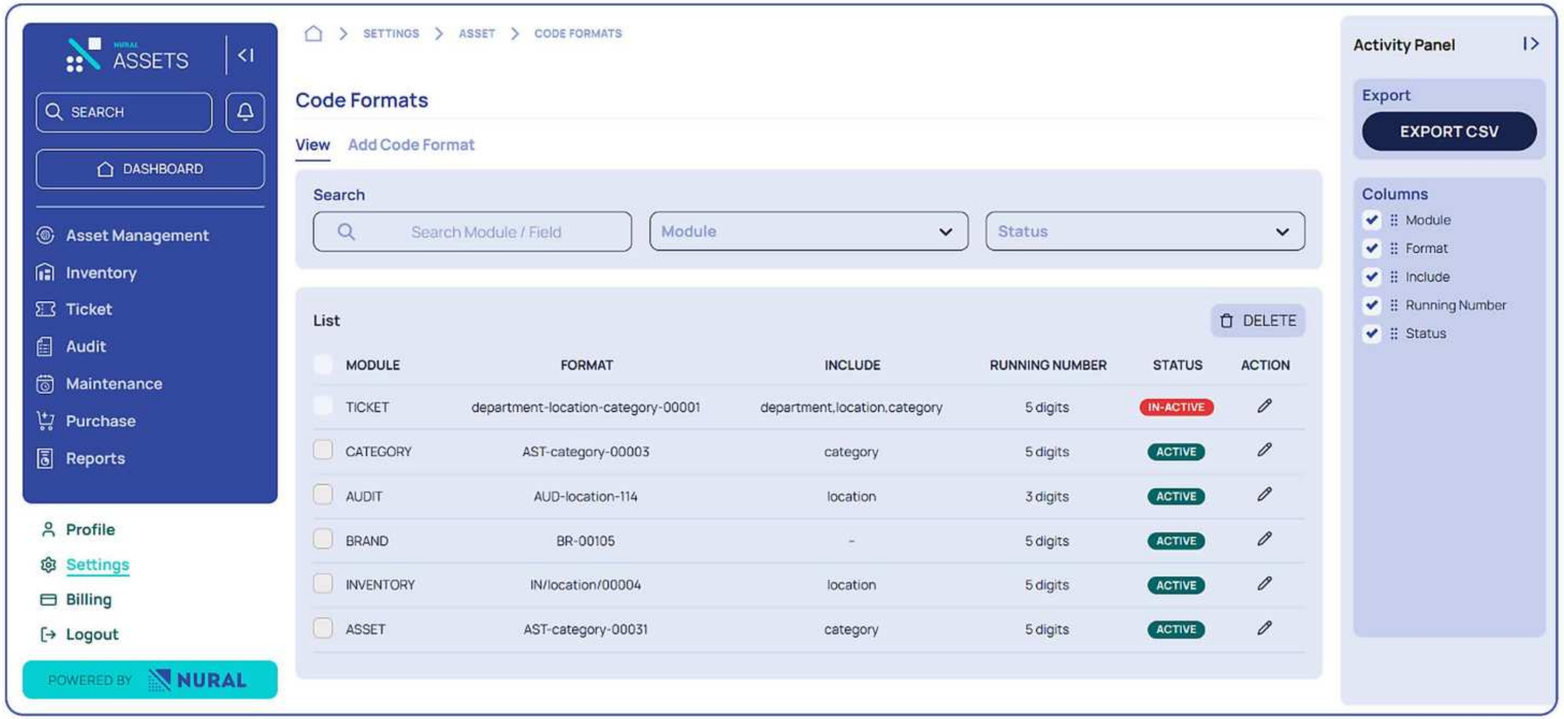


Figure 38 - View/Edit Code Formats

STEPS

1. Go to: Settings → Asset → Code Formats. The List displays all existing code formats with their Module, Format, Include, Running Number, and Status.
2. To find a code format, use Search Module / Field, or filter the list by the Module and Status dropdowns.
3. To edit a code format, click the edit (pencil) icon in the Actions column of its row, update the fields, and save your changes.
4. To delete code formats, select the checkbox(es) beside the required rows and click Delete.
5. In the Activity Panel, use the Columns options to show or hide columns (Module, Format, Include, Running Number, Status), and click EXPORT CSV under Export to download the list as an Excel/CSV file.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to Page to go to a specific page.

People and Access

Add your team, decide what each role can see and do, and print the labels that tie physical assets to their records.

People

Barcode & QR Code Templates

Roles & Permissions

User Activity Logs

Login Activity

Add User



Figure 39 - Add User

The People module lets you manage the users who can access Nural Assets. Each user record captures a Name, Email, Department, Role, Location, and Status, and controls the user's sign-in and permissions. You can add users one at a time, review and edit existing users, or import many users at once from a spreadsheet. The People module is maintained under Settings → People.

STEPS

1. Go to: Settings → People, then open the Add User tab.
2. In Name (mandatory), enter the user's full name.
3. In Email (mandatory), enter the user's email address; this is used for sign-in and notifications.
4. From the Department dropdown (mandatory), select the user's department.
5. From the Select Role dropdown (mandatory), select the role that defines the user's permissions.
6. From the Must Change Password dropdown, select Yes to require the user to set a new password at first login, or No to keep the assigned password.

Add User



Figure 39 - Add User

STEPS, CONTINUED

7. From the Location dropdown, optionally select the user's location.
8. Use the Department Head toggle to mark the user as the head of their department (off by default).
9. Use the Status toggle to mark the user Active (default) or inactive.
10. In Password (mandatory), enter an initial password for the user; click the eye icon to show or hide what you type.
11. Click SUBMIT to save. The new user appears in the List under the View tab.

View/Edit Users

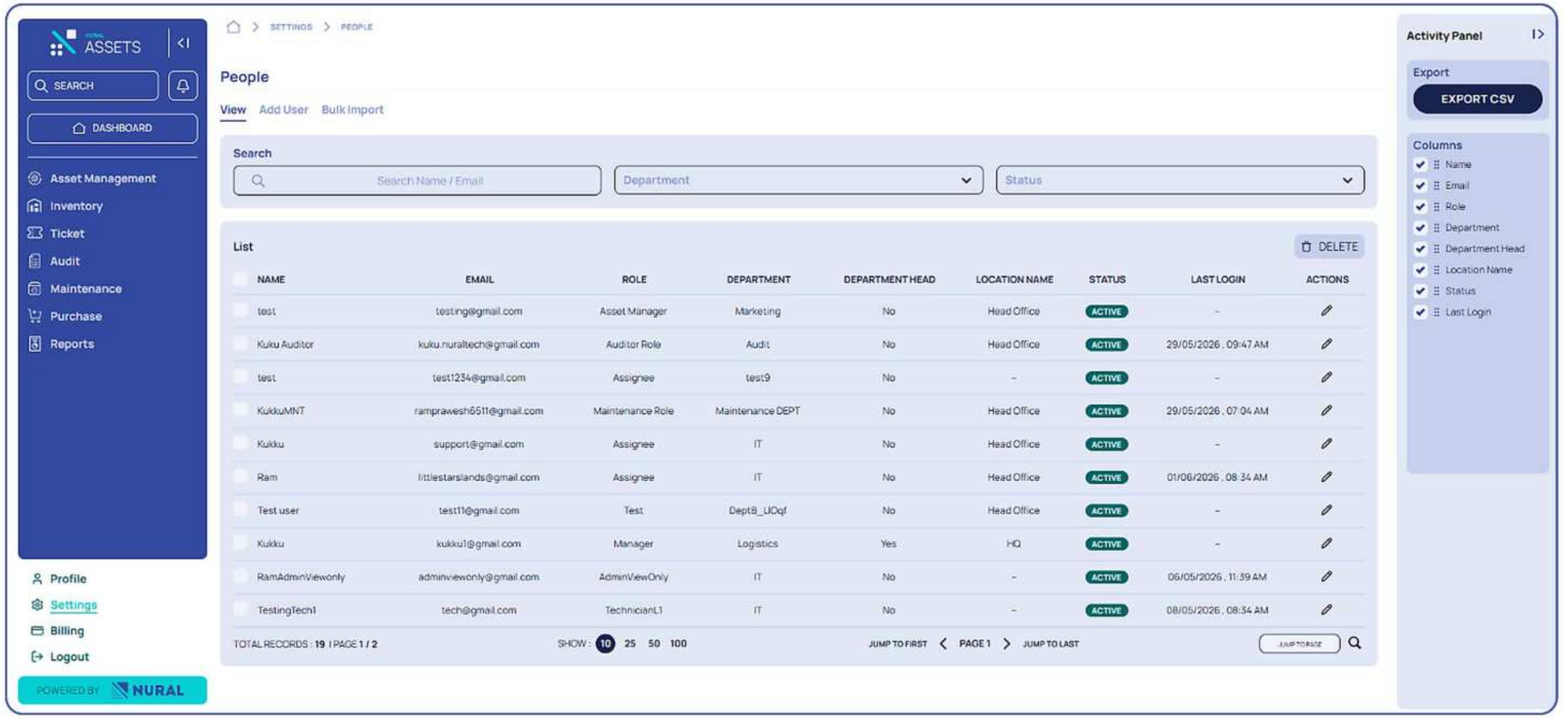


Figure 40 - View/Edit Users

STEPS

1. Go to: Settings → People. The List displays all existing users with their Name, Email, Role, Department, Department Head, Location Name, Status, and Last Login.
2. To find a user, use Search Name / Email, or filter the list by the Department and Status dropdowns.
3. To edit a user, click the edit (pencil) icon in the Actions column of its row, update the fields, and save your changes.
4. To delete users, select the checkbox(es) beside the required rows and click Delete.
5. In the Activity Panel, use the Columns options to show or hide columns (Name, Email, Role, Department, Department Head, Location Name, Status, Last Login), and click EXPORT CSV under Export to download the list as an Excel/CSV file.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page to move through the list.

Bulk Import

STEPS

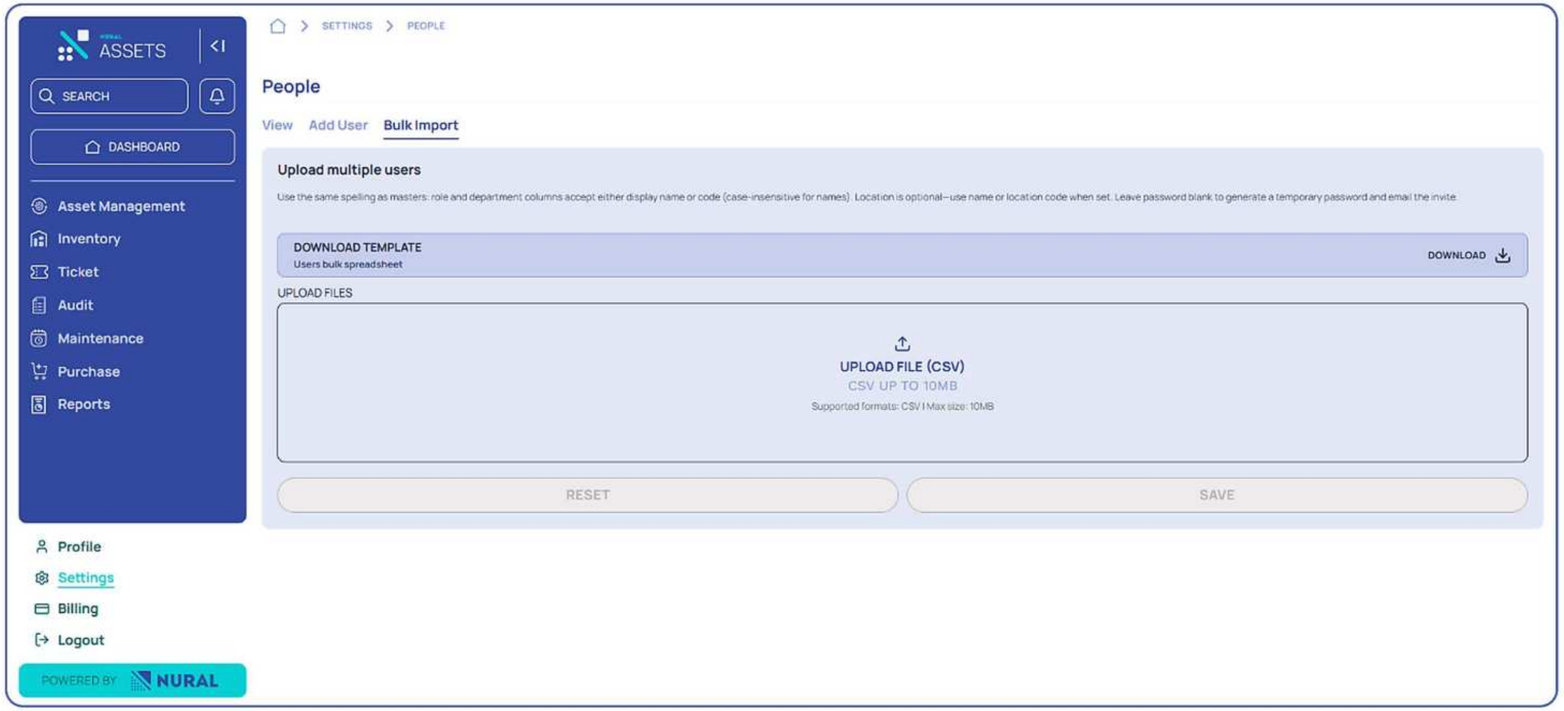


Figure 41 - People › Bulk Import (1 of 2)

Bulk Import

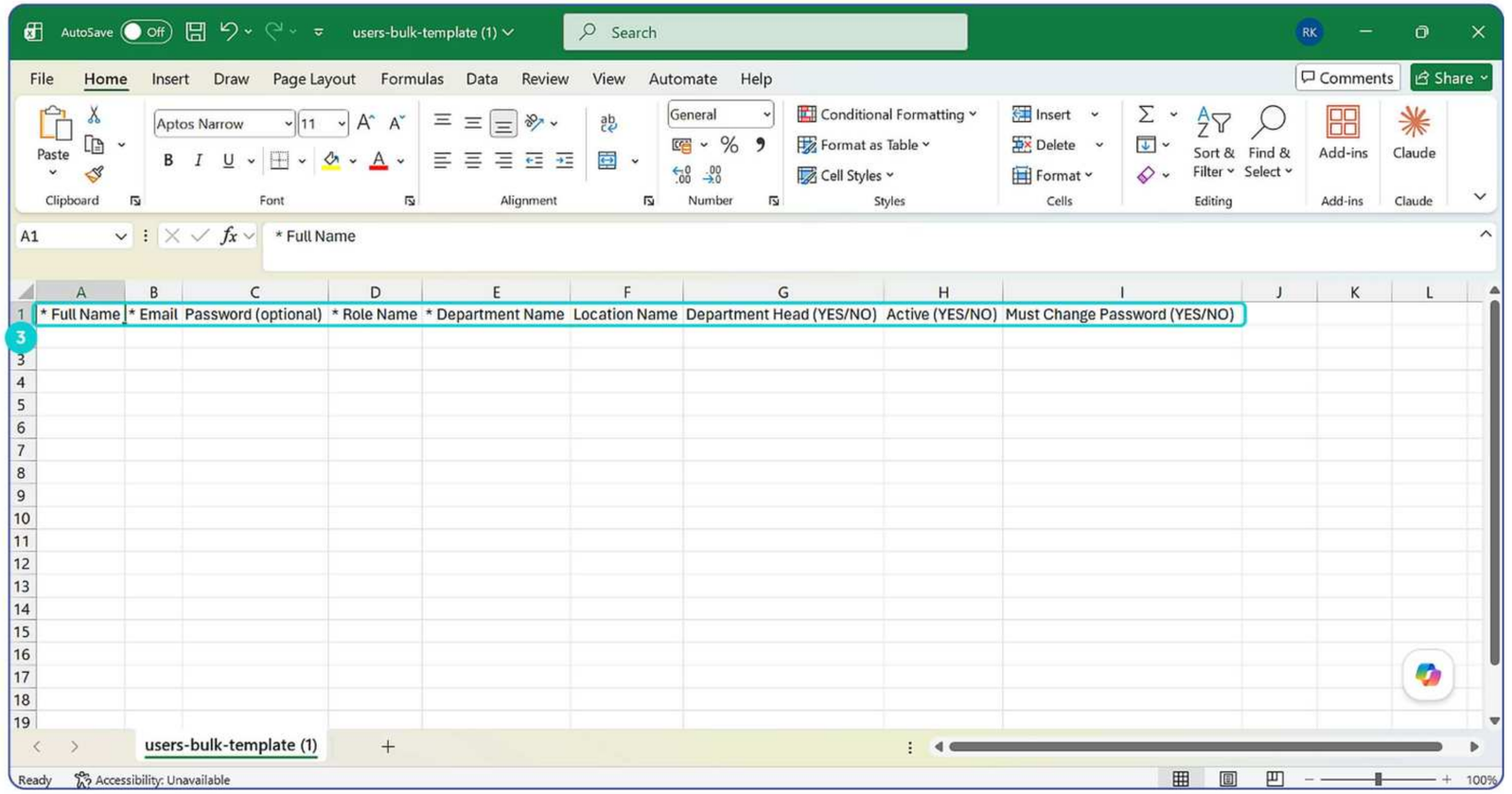


Figure 42 - People › Bulk Import (2 of 2)

STEPS

1. Go to: Settings → People, then open the Bulk Import tab.
2. Under Download Template, click DOWNLOAD to get the Users bulk spreadsheet. It contains the columns Full Name, Email, Password (optional), Role Name, Department Name, Location Name, Department Head (YES/NO), Active (YES/NO), and Must Change Password (YES/NO).
3. Fill in the template with one user per row. Use the same spelling as the masters - the Role Name and Department Name columns accept either the display name or the code (case-insensitive for names). Location is optional; use the location name or code when set. Leave the Password column blank to generate a temporary password and email the user an invite. Full Name, Email, Role Name, and Department Name are mandatory.
4. Under Upload Files, click UPLOAD FILE (CSV) and select your completed file (CSV format, maximum size 10 MB).
5. Click SAVE to import the users, or click RESET to clear the selected file and start over.

View Templates

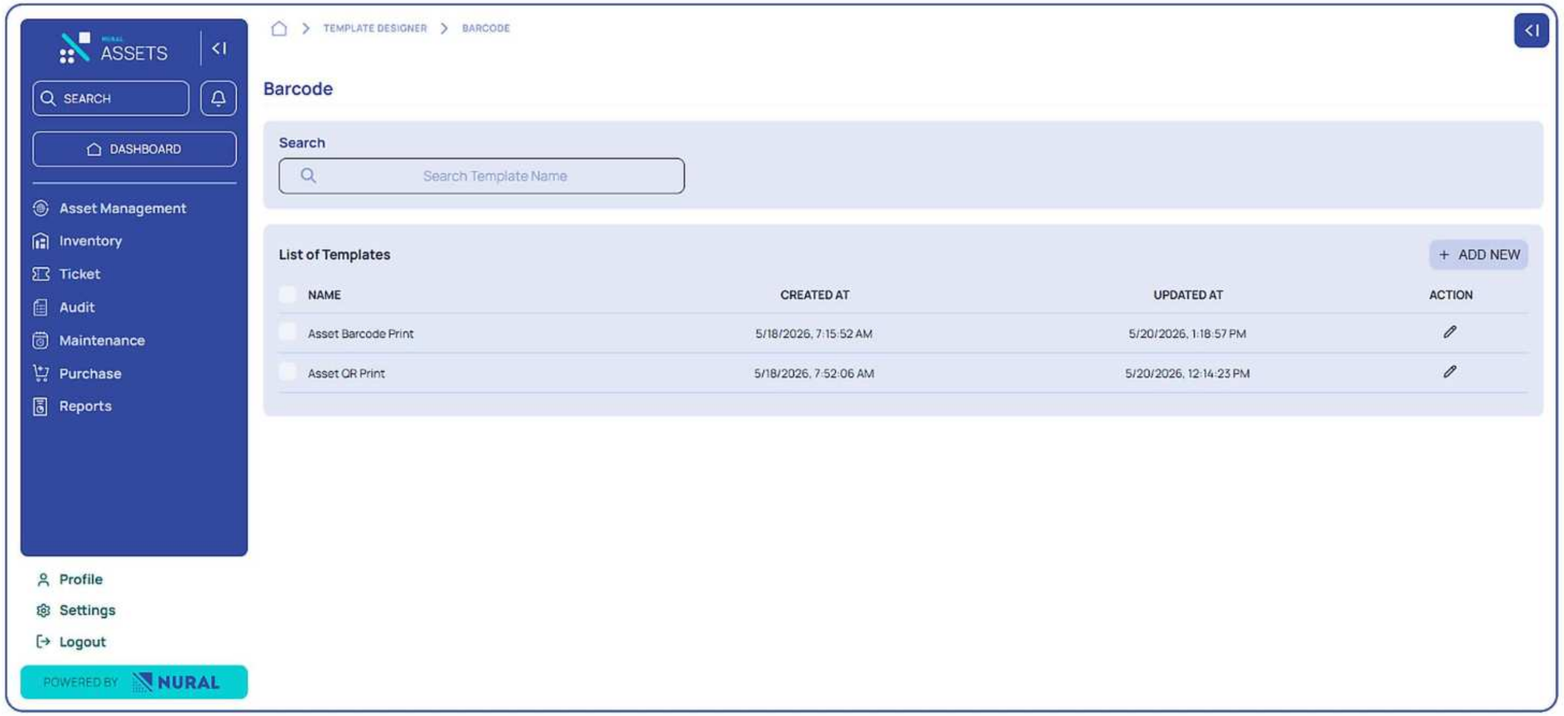


Figure 43 - View Templates

The Barcode & QR Code Templates module lets you design and manage the label templates used to print barcode and QR code stickers for your assets. Each template defines the label size and layout - including the code, asset fields, text, images, and your logo - and can be previewed and exported as a PDF or PNG for printing. Templates are managed under Template Designer → Barcode.

STEPS

1. Go to: Template Designer → Barcode. The List of Templates displays all existing label templates with their Name, Created At, and Updated At dates.
2. To find a template, use Search Template Name to filter the list.
3. To edit a template, click the edit (pencil) icon in the Action column of its row to open it in the Label Designer.
4. To create a new template, click + ADD NEW and complete the Add New Label dialog (see the next section).

Add a New Template

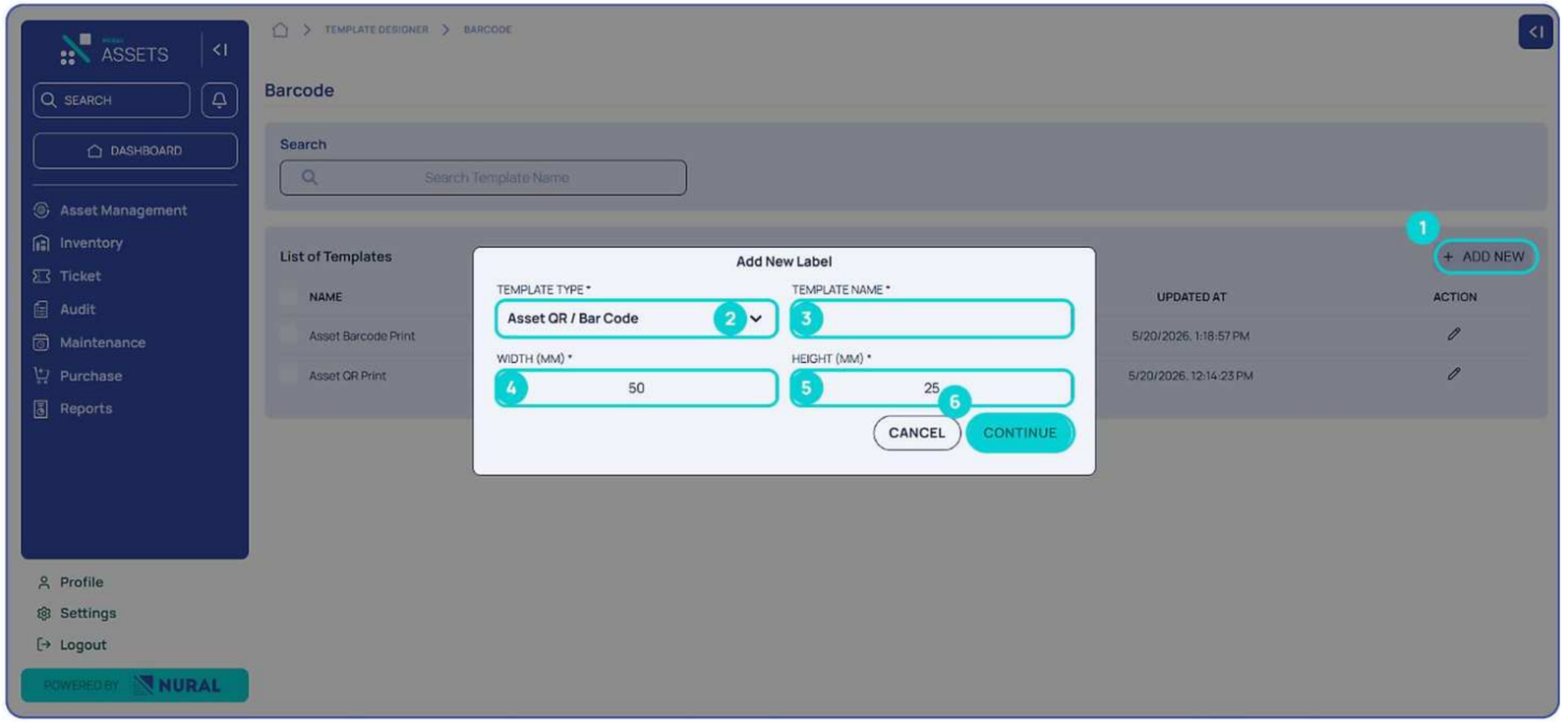


Figure 44 - Add a New Template

STEPS

1. On the Barcode screen, click + ADD NEW. The Add New Label dialog opens.
2. From the Template Type dropdown (mandatory), select the label type - for example, Asset QR / Bar Code.
3. In Template Name (mandatory), enter a name for the template.
4. In Width (mm) (mandatory), enter the label width in millimetres - for example, 50.
5. In Height (mm) (mandatory), enter the label height in millimetres - for example, 25.
6. Click CONTINUE to open the Label Designer, or click CANCEL to discard the label.

Design the Label

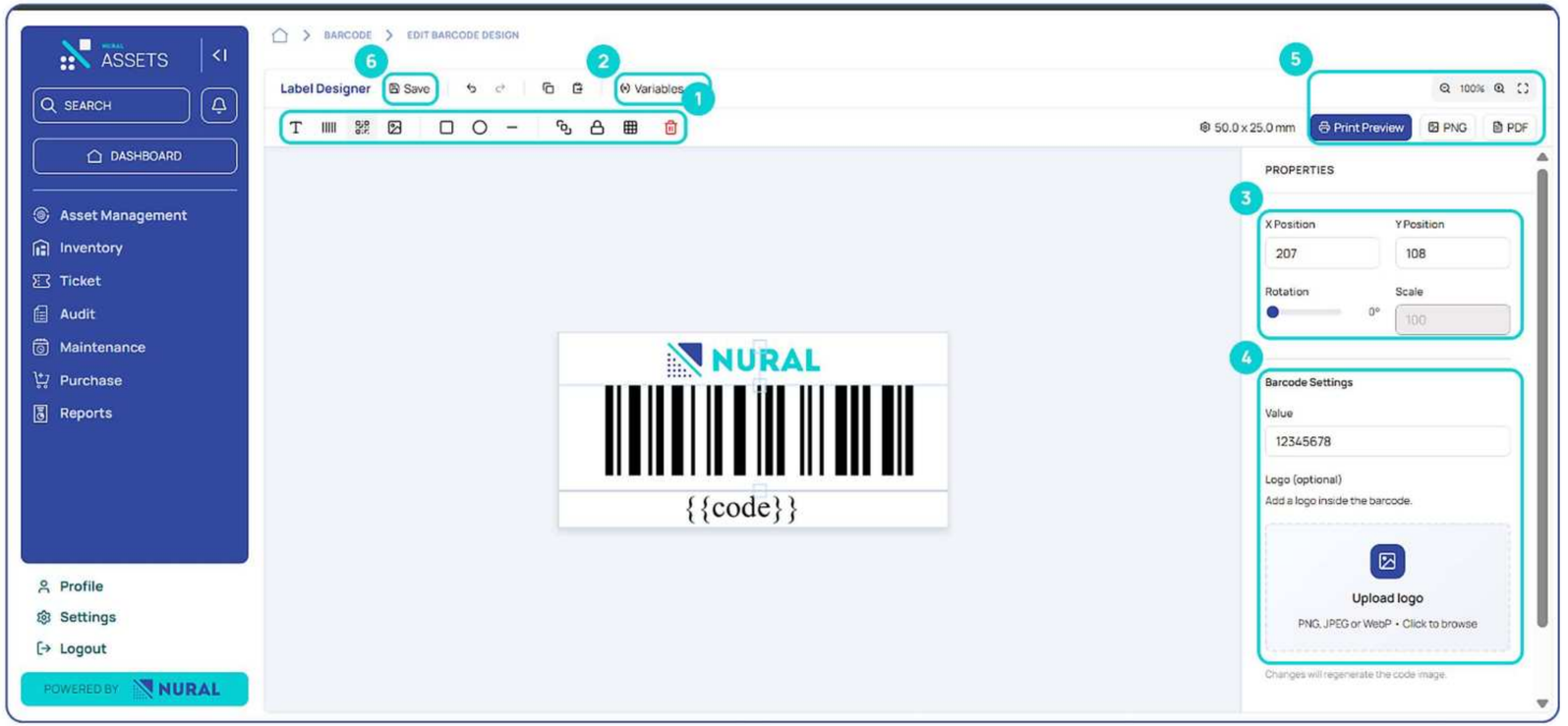


Figure 45 - Design the Label



Properties: position, rotation and scale

STEPS

1. In the Label Designer, use the toolbar to add elements to the label: Text, Barcode, QR Code, and Image, along with shapes (rectangle, circle, and line). Use the group, lock, grid, and delete tools to arrange and manage the elements.
2. Use the Variables dropdown to insert dynamic asset fields (such as {{code}}) that are replaced with each asset's data when the label is printed.
3. Select an element to open the Properties panel, where you can set its X Position, Y Position, Rotation, and Scale.
4. For a barcode or QR Code element, enter the Value under Barcode Settings, and optionally upload a Logo (PNG, JPEG, or WebP) to display inside the code.
5. Use the zoom controls and Print Preview to check the layout, and export the label using PNG or PDF if required.
6. Click Save to store the template. It appears in the List of Templates on the Barcode screen.

Create Role

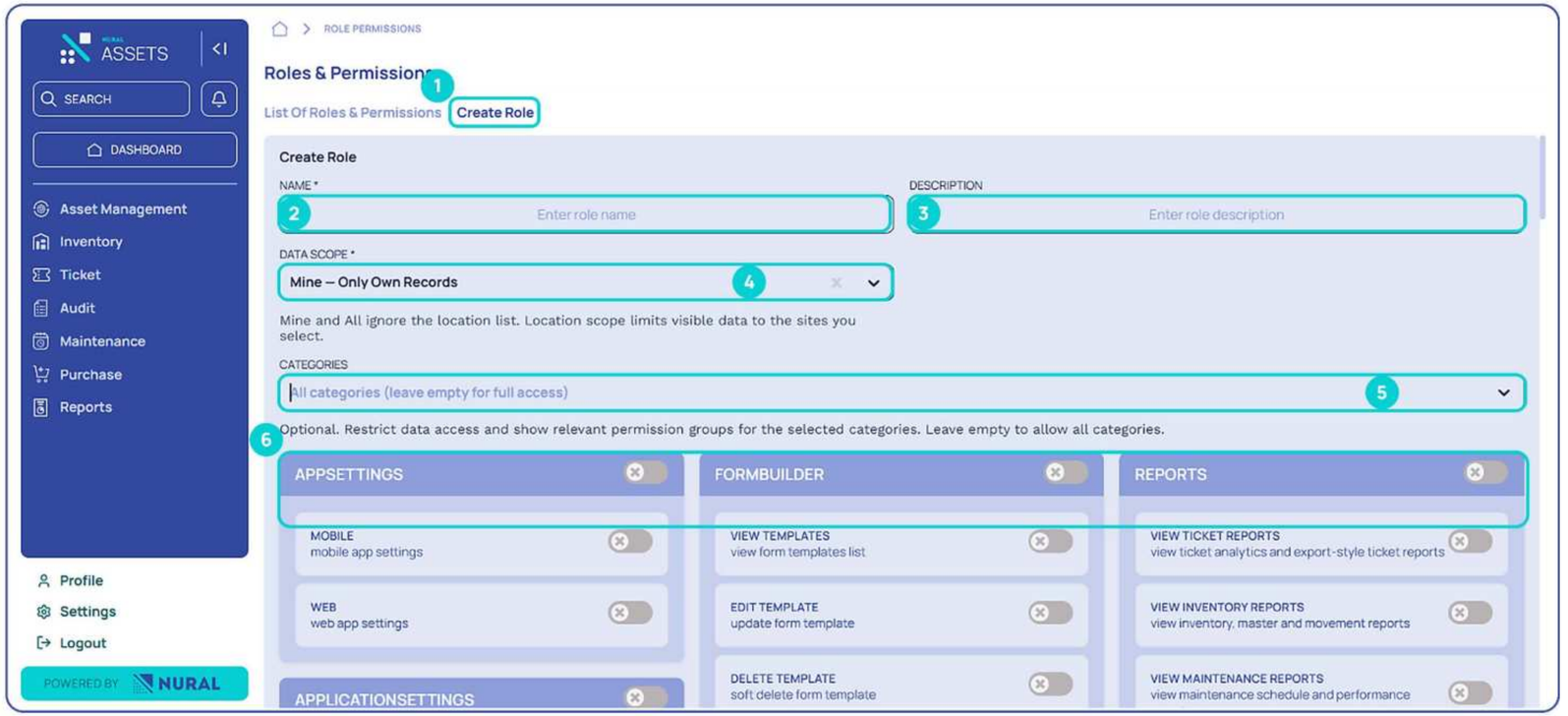


Figure 46 - Create Role

The Roles & Permissions module lets you define the roles that control what each user can see and do in Nural Assets. A role sets a data scope, optional category restrictions, and a set of permissions grouped by module - such as App Settings, Form Builder, and Reports - and is then assigned to users under the People module. Roles are maintained under Settings → Roles & Permissions.

STEPS

1. Go to: Settings → Roles & Permissions, then open the Create Role tab.
2. In Name (mandatory), enter a name for the role - for example, Asset Assignee.
3. In Description, optionally enter a short description of what the role is for.
4. From the Data Scope dropdown (mandatory), select how much data the role can access: Mine - Only Own Records, All - All Organisation Records, or Location - records for the selected sites. Mine and All ignore the location list; Location scope limits visible data to the sites you select.

Create Role

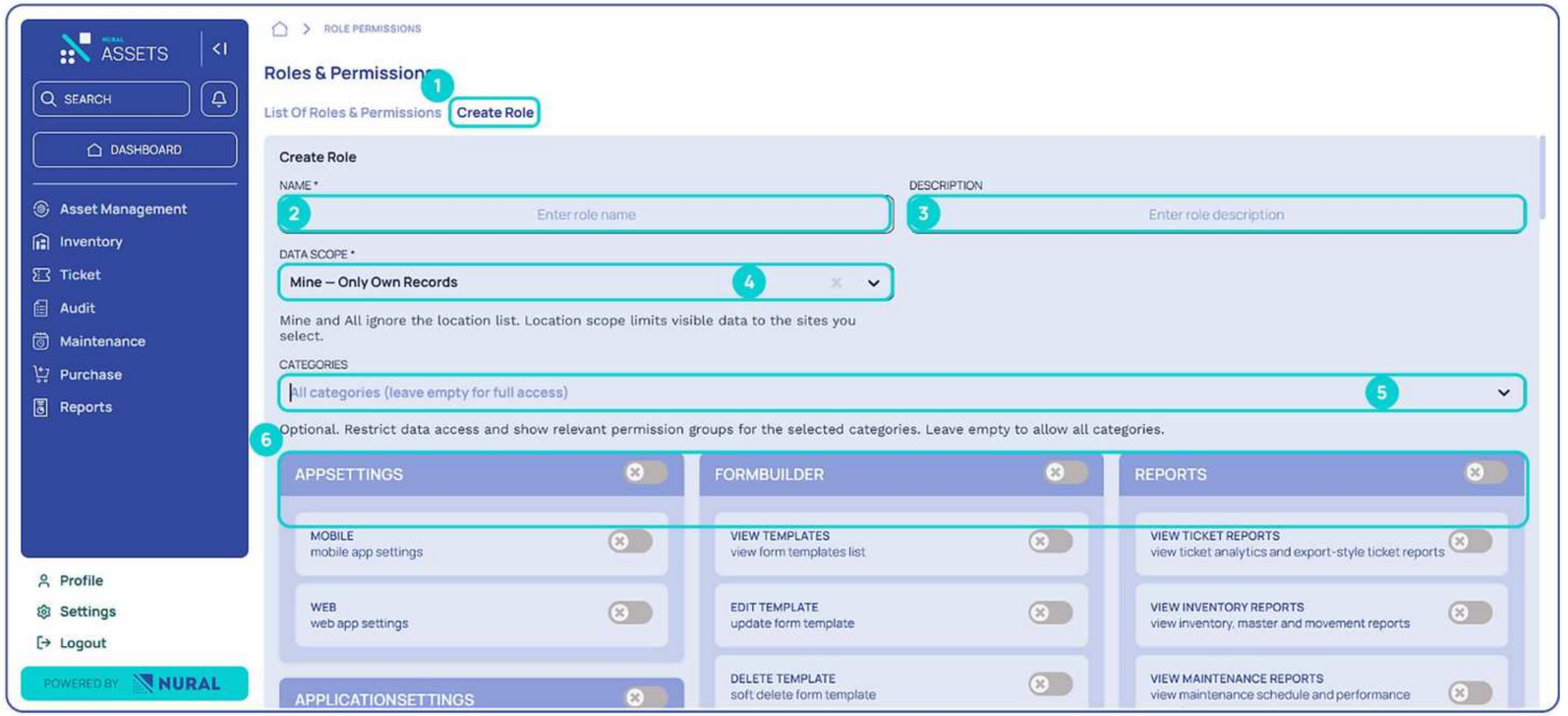


Figure 46 - Create Role

STEPS, CONTINUED

5. In Categories, optionally select one or more asset categories to restrict the role's data access and show only the relevant permission groups. Leave empty to allow all categories.

6. Turn on the permission groups the role needs (such as App Settings, Form Builder, and Reports) using the toggle in each group's header, then enable the individual permissions within each group - for example, View Templates, Edit Template, or View Ticket Reports.

7. Click Save at the bottom of the form to create the role. The new role appears in the List of Roles & Permissions.

View/Edit Roles

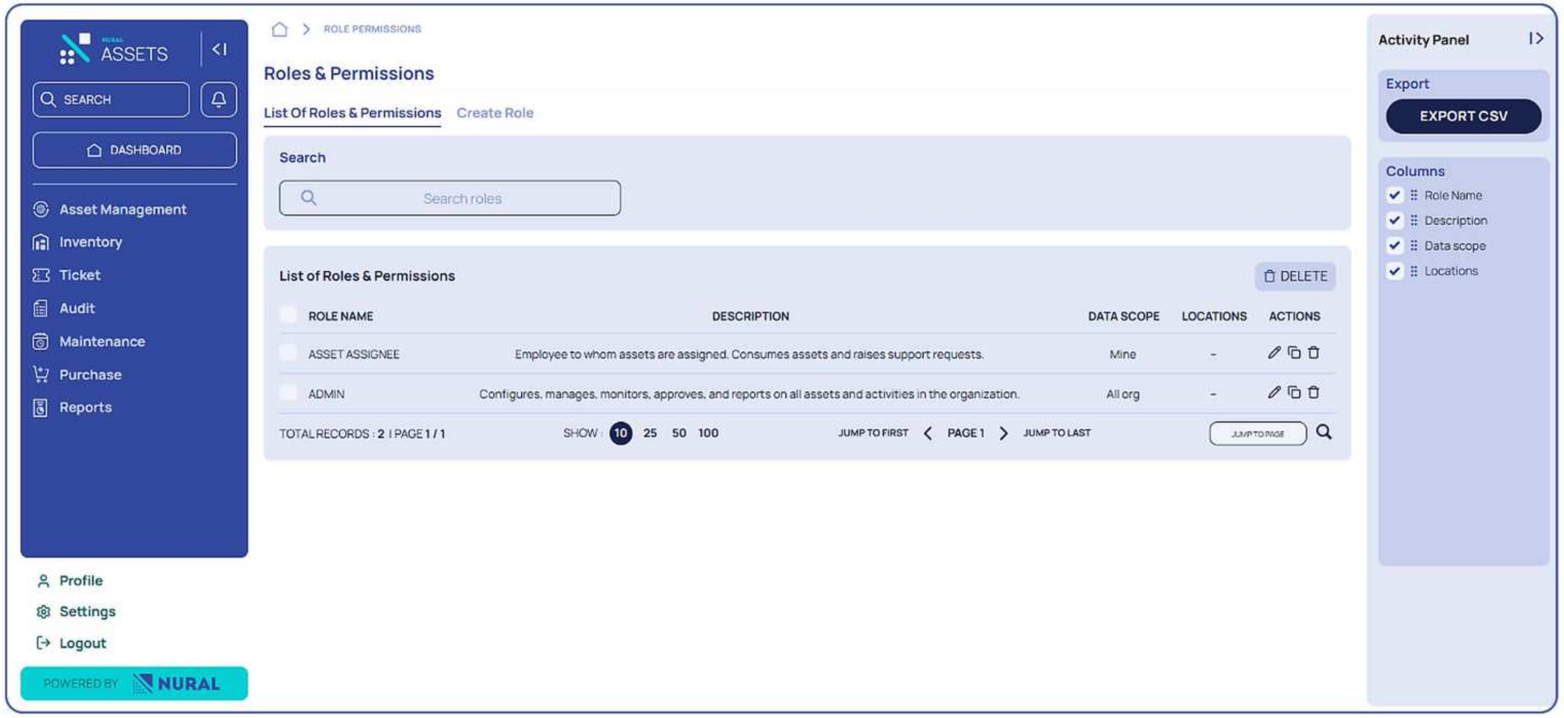


Figure 47 - View/Edit Roles

STEPS

1. Go to: Settings → Roles & Permissions. The List of Roles & Permissions displays all existing roles with their Role Name, Description, Data Scope, and Locations.
2. To find a role, use Search roles to filter the list.
3. To edit a role, click the edit (pencil) icon in the Actions column of its row, update the details and permissions, and save your changes.
4. To duplicate a role, click the copy icon in the Actions column to create a new role pre-filled with the same settings.
5. To delete roles, select the checkbox(es) beside the required rows and click Delete, or click the delete (trash) icon in a row's Actions column.
6. In the Activity Panel, use the Columns options to show or hide columns (Role Name, Description, Data Scope, Locations), and click EXPORT CSV under Export to download the list as an Excel/CSV file.
7. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

User Activity Logs



Figure 48 - User Activity Logs (1 of 2)

The User Activity Logs give administrators a chronological audit trail of the actions performed across Nural Assets, which is useful for security reviews and troubleshooting. Each entry records the User Name, Module Name, Activity Type, a short Summary, and the Date and Time of the action. User activity is available under Settings → System Logs → User Activity.

STEPS

User Activity Logs



Figure 49 - User Activity Logs (2 of 2)

STEPS

1. Go to: Settings → System Logs → User Activity. The log lists all recorded activities along a timeline, with the most recent entry first.
2. Review each entry to see the User Name, Module Name (for example, AUTH), Activity Type (for example, LOGIN), Summary (for example, "User login successful"), and the Date and Time of the action.
3. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page to move through the log.

Login Activity

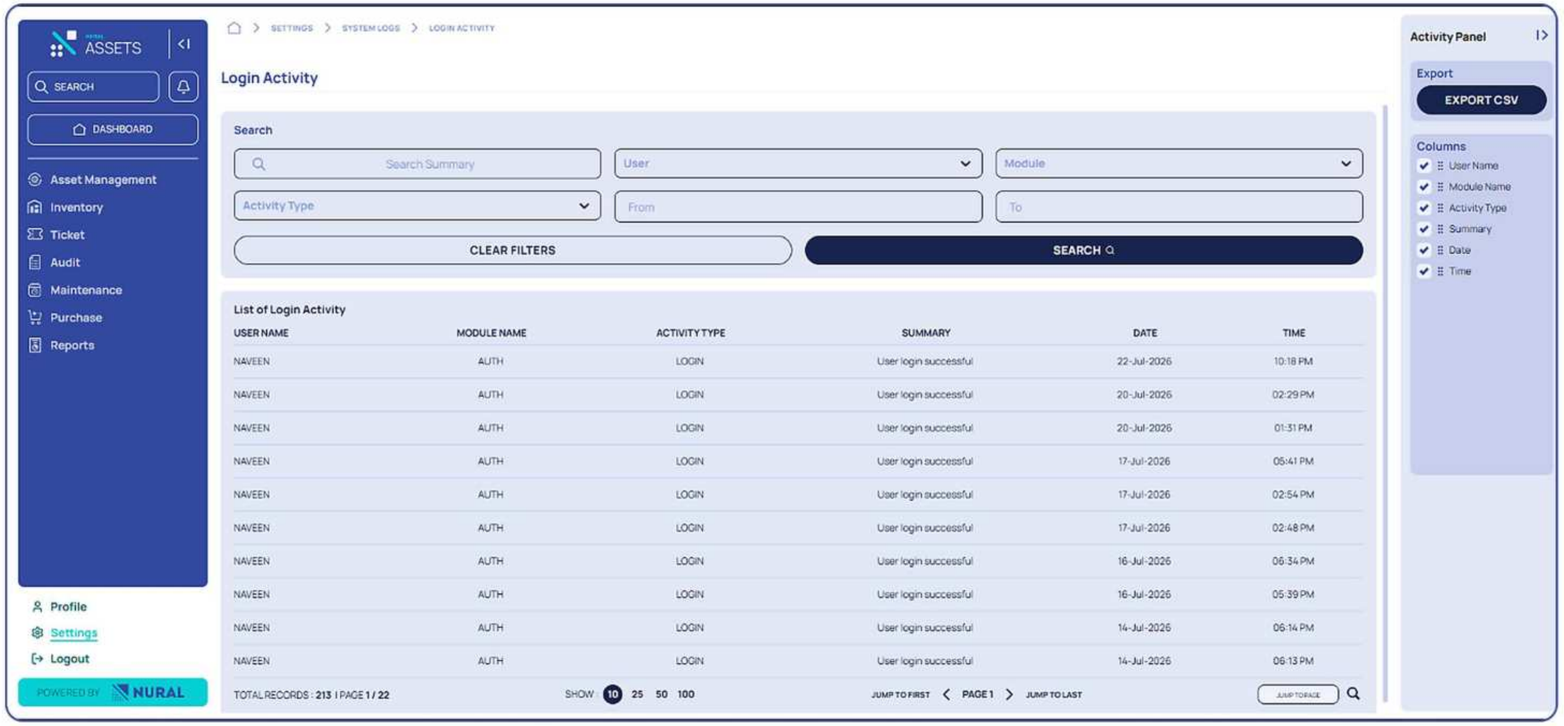


Figure 50 - Login Activity

The Login Activity log records every sign-in event in Nural Assets, giving administrators a searchable history for security monitoring and troubleshooting. Each entry captures the User Name, Module Name, Activity Type, Summary, and the Date and Time of the event. Login activity is available under Settings → System Logs → Login Activity.

STEPS

1. Go to: Settings → System Logs → Login Activity. The List of Login Activity displays all recorded sign-in events with their User Name, Module Name, Activity Type, Summary, Date, and Time.
2. To narrow the list, use the Search panel: type in Search Summary and/or filter by the User, Module, and Activity Type dropdowns and the From and To date range, then click SEARCH. Click CLEAR FILTERS to reset the search.
3. In the Activity Panel, use the Columns options to show or hide columns (User Name, Module Name, Activity Type, Summary, Date, Time), and click EXPORT CSV under Export to download the list as an Excel/CSV file.
4. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page to move through the log.

Core Modules

The day to day work: registering assets, holding stock, raising tickets, running audits, scheduling maintenance and buying what you need.

Asset Management

Inventory

Ticket Management

Audit Management

Maintenance

Purchase

Add Asset

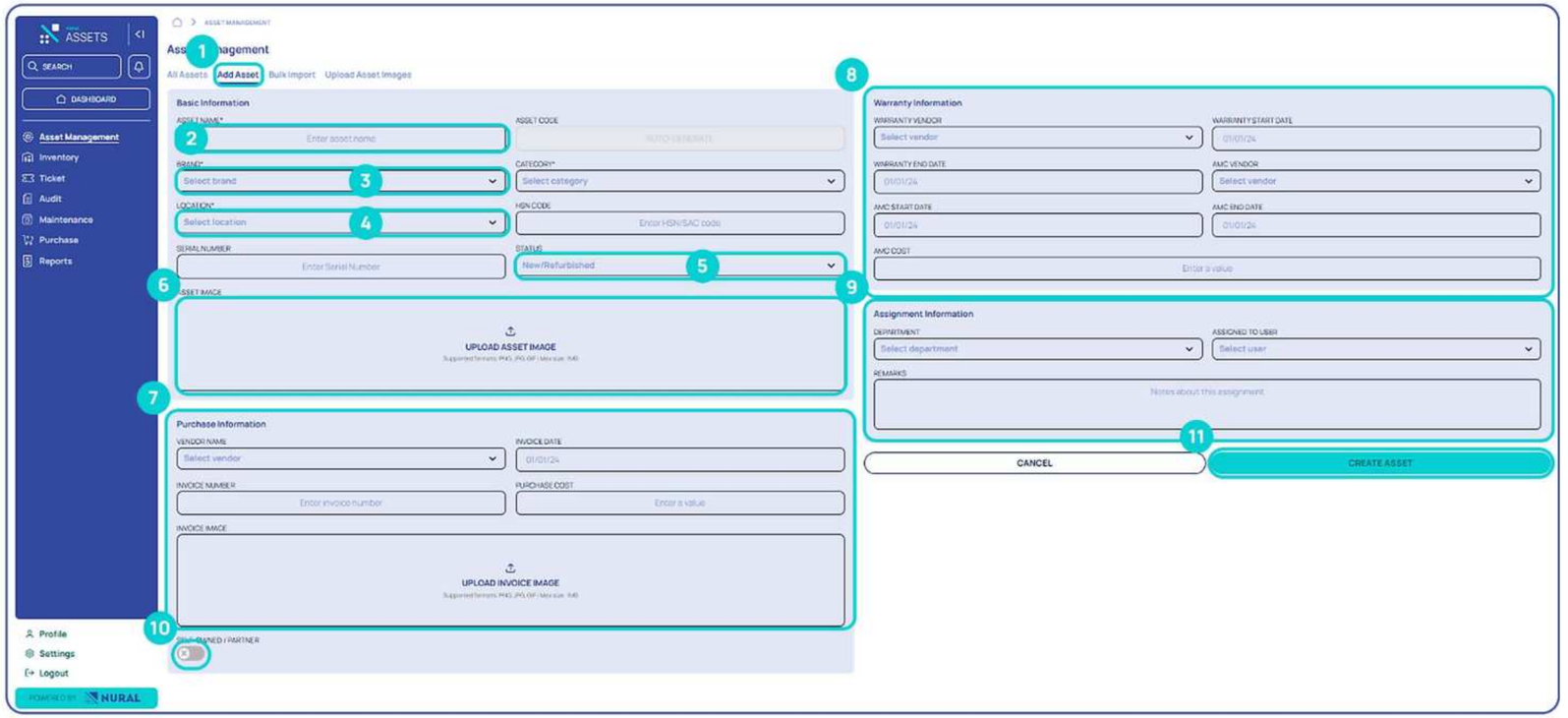


Figure 51 - Add Asset



Self-Owned / Partner ownership toggle

The Asset Management module is the core of Nural Assets, where you create and manage every asset in your organisation. You can add assets one at a time with full purchase, warranty, and assignment details, import many assets at once from a spreadsheet, attach asset images in bulk, and then view, search, assign, transfer, return, and dispose of assets from a single list. Asset Management is available from the main navigation menu.

STEPS

1. Go to: Asset Management, then open the Add Asset tab.
2. Under Basic Information, in Asset Name (mandatory), enter the name of the asset. The Asset Code is generated automatically and cannot be edited.
3. From the Brand dropdown (mandatory), select the asset's brand, and from the Category dropdown (mandatory), select its category.
4. From the Location dropdown (mandatory), select where the asset is located.
5. Optionally enter the HSN Code and Serial Number, and from the Status dropdown select the asset's condition (New/Refurbished).
6. To add a photo of the asset, click Upload Asset Image and select a PNG, JPG, or GIF file (maximum size 1 MB).

Add Asset

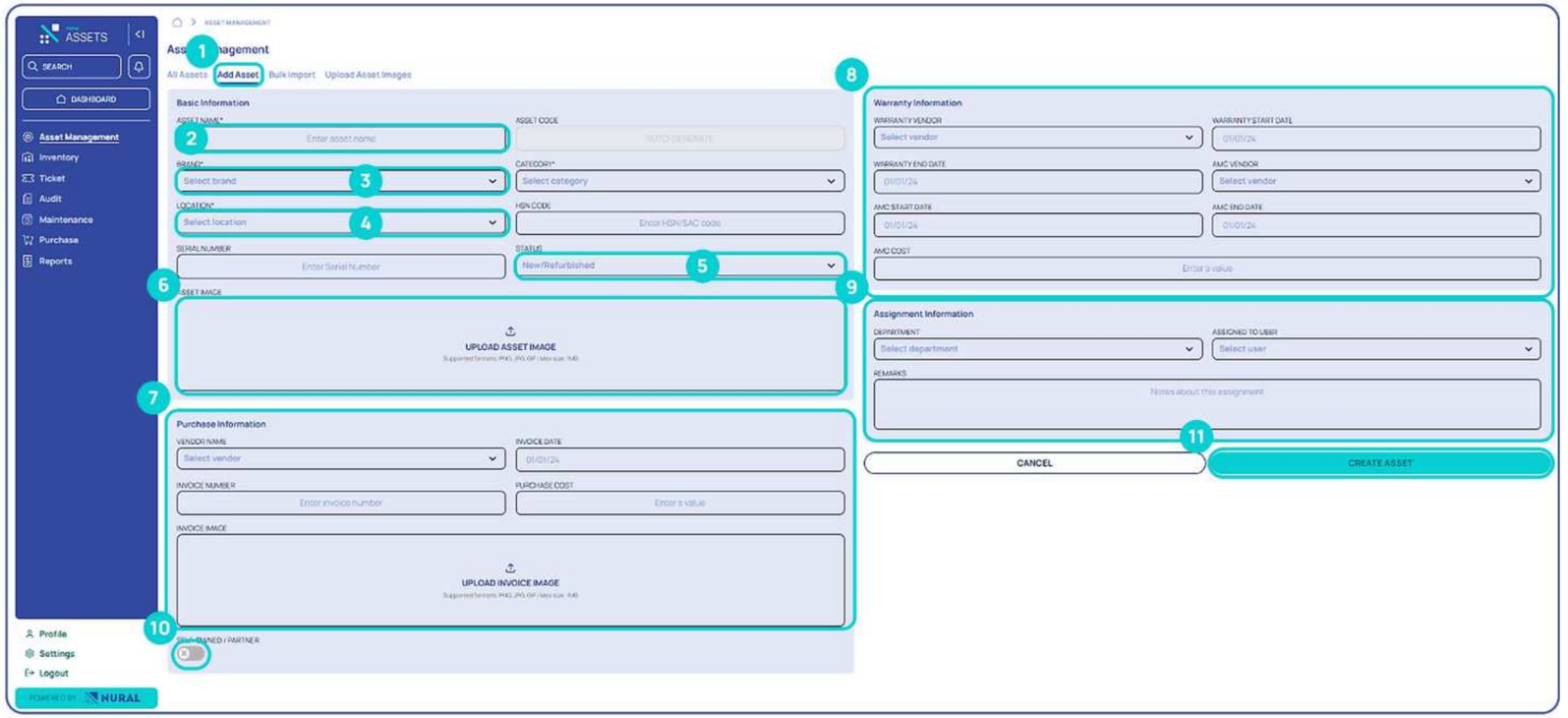


Figure 51 - Add Asset



Self-Owned / Partner ownership toggle

STEPS, CONTINUED

7. Under Purchase Information, select the Vendor Name and enter the Invoice Date, Invoice Number, and Purchase Cost. To attach the bill, click Upload Invoice Image (PNG, JPG, or GIF, maximum 1 MB).

8. Under Warranty Information, select the Warranty Vendor and set the Warranty Start Date and Warranty End Date. For an annual maintenance contract, select the AMC Vendor, set the AMC Start Date and AMC End Date, and enter the AMC Cost.

9. Under Assignment Information, select the Department and the Assigned To User if the asset is being issued to someone, and add any Remarks about the assignment.

10. Use the Self-Owned / Partner toggle to indicate whether the asset is owned by your organisation or by a partner.

11. Click CREATE ASSET to save the asset, or click CANCEL to discard it. The new asset appears in the All Assets list.

Bulk Import

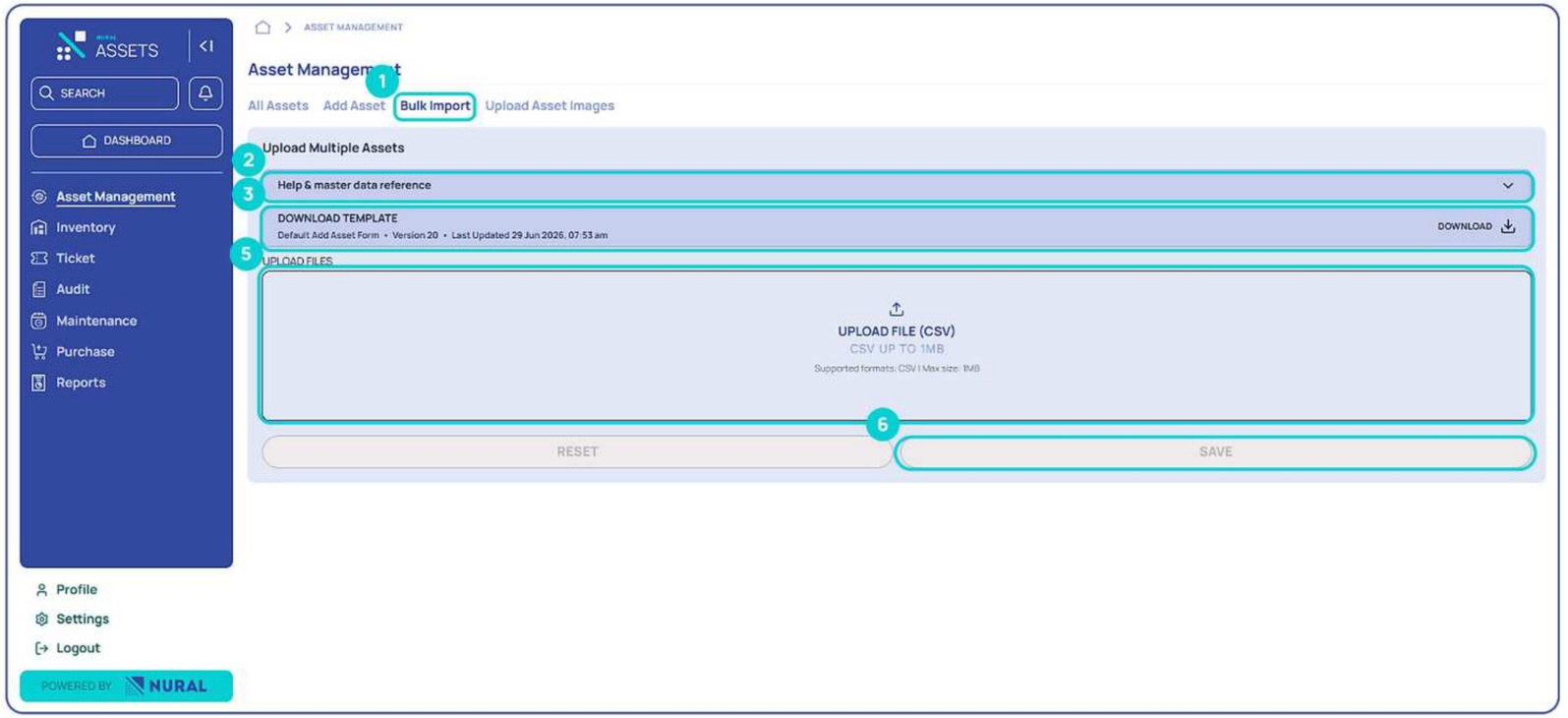


Figure 52 - Asset Management › Bulk Import

STEPS

1. Go to: Asset Management, then open the Bulk Import tab.
2. Expand Help & master data reference to see the accepted values for each column, such as the brand, category, and location names used in your masters.
3. Under Download Template, click DOWNLOAD to get the current Add Asset template. The template version and last-updated date are shown beside it.
4. Fill in the template with one asset per row, using the master data values from the reference above.
5. Under Upload Files, click UPLOAD FILE (CSV) and select your completed file (CSV format, maximum size 1 MB).
6. Click SAVE to import the assets, or click RESET to clear the selected file and start over.

Upload Asset Images

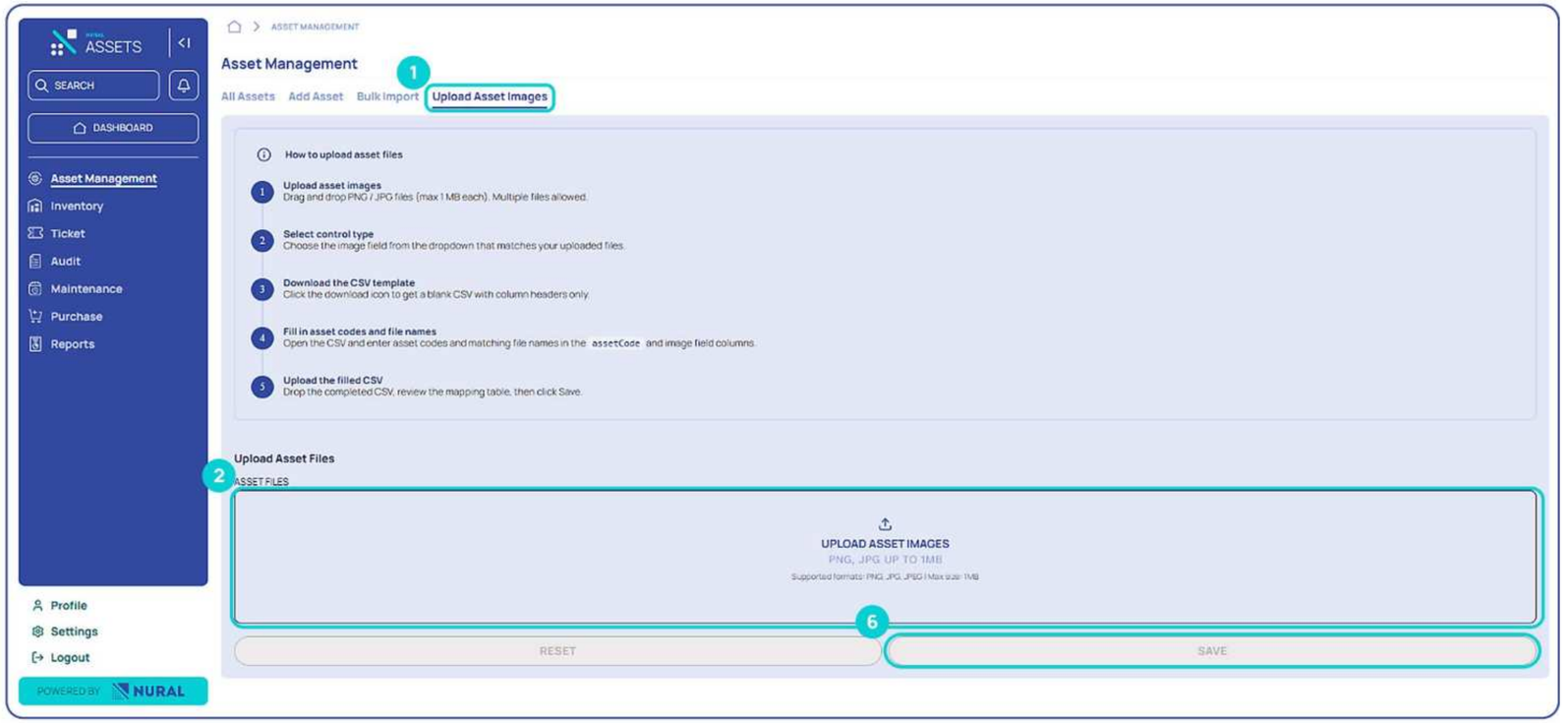


Figure 53 - Upload Asset Images

STEPS

1. Go to: Asset Management, then open the Upload Asset Images tab.
2. Under Upload Asset Files, drag and drop the asset images (PNG or JPG, maximum 1 MB each). Multiple files are allowed.
3. Select the control type - choose the image field from the dropdown that matches the files you uploaded.
4. Download the CSV template using the download icon to get a blank CSV with the column headers only.
5. Open the CSV and enter the asset codes and matching file names in the assetCode and image-field columns.
6. Upload the completed CSV, review the mapping table, then click SAVE (or click RESET to start over).

All Assets

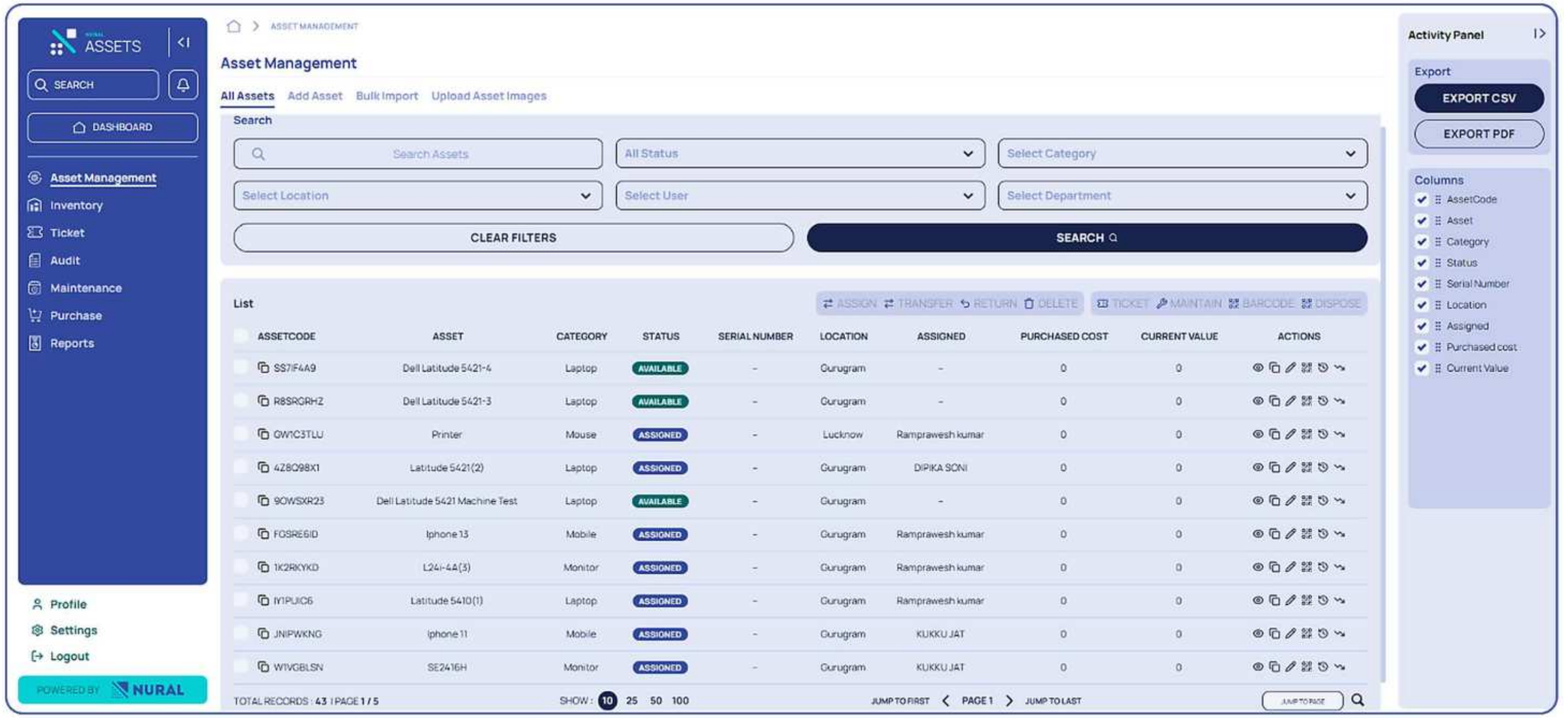


Figure 54 - All Assets

STEPS

1. Go to: Asset Management. The All Assets tab is the default view and lists every asset with its Asset Code, Asset, Category, Status, Serial Number, Location, Assigned user, Purchased Cost, and Current Value.
2. To find an asset, type in Search Assets and/or filter by the Status, Category, Location, User, and Department dropdowns, then click SEARCH. Click CLEAR FILTERS to reset.
3. Use the row action icons in the Actions column to view an asset, copy its asset code, generate a barcode/QR code, or view its history.
4. Select the assets you want to act on using the checkboxes; the toolbar above the list then enables the following actions.
5. Assign - issue the selected assets to a user and department.
6. Transfer - move the assets to another location, department, or user.
7. Return - return assigned assets, marking them available again.

All Assets

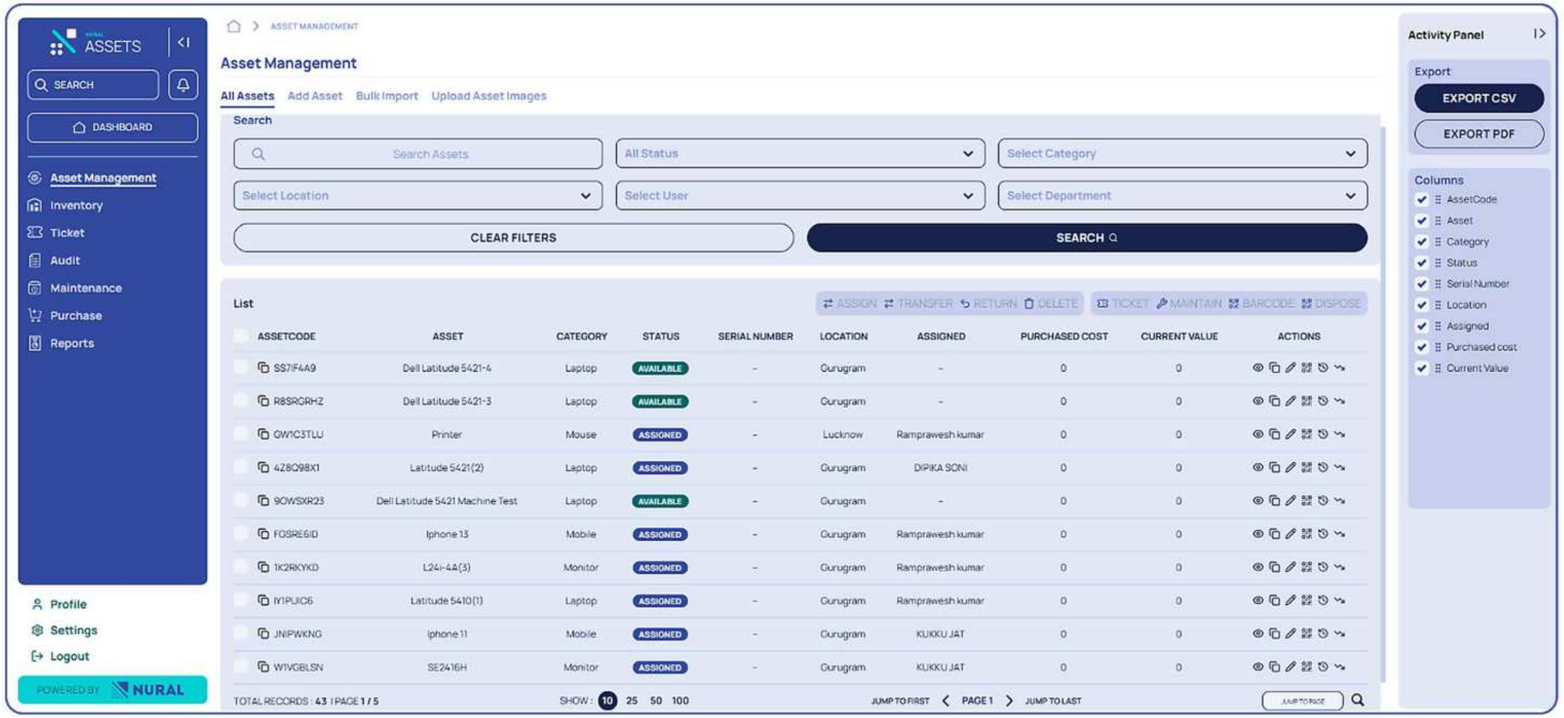


Figure 54 - All Assets

STEPS, CONTINUED

8. Delete - remove the selected assets from the register.
9. Ticket - raise a support or service ticket against the selected assets.
10. Maintain - send the assets for maintenance or schedule a maintenance activity.
11. Barcode - generate and print barcode or QR labels for the selected assets.
12. Dispose - retire or write off the assets, removing them from active use.
13. In the Activity Panel, use the Columns options to show or hide columns, and click EXPORT CSV or EXPORT PDF under Export to download the list.
14. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

Add Item

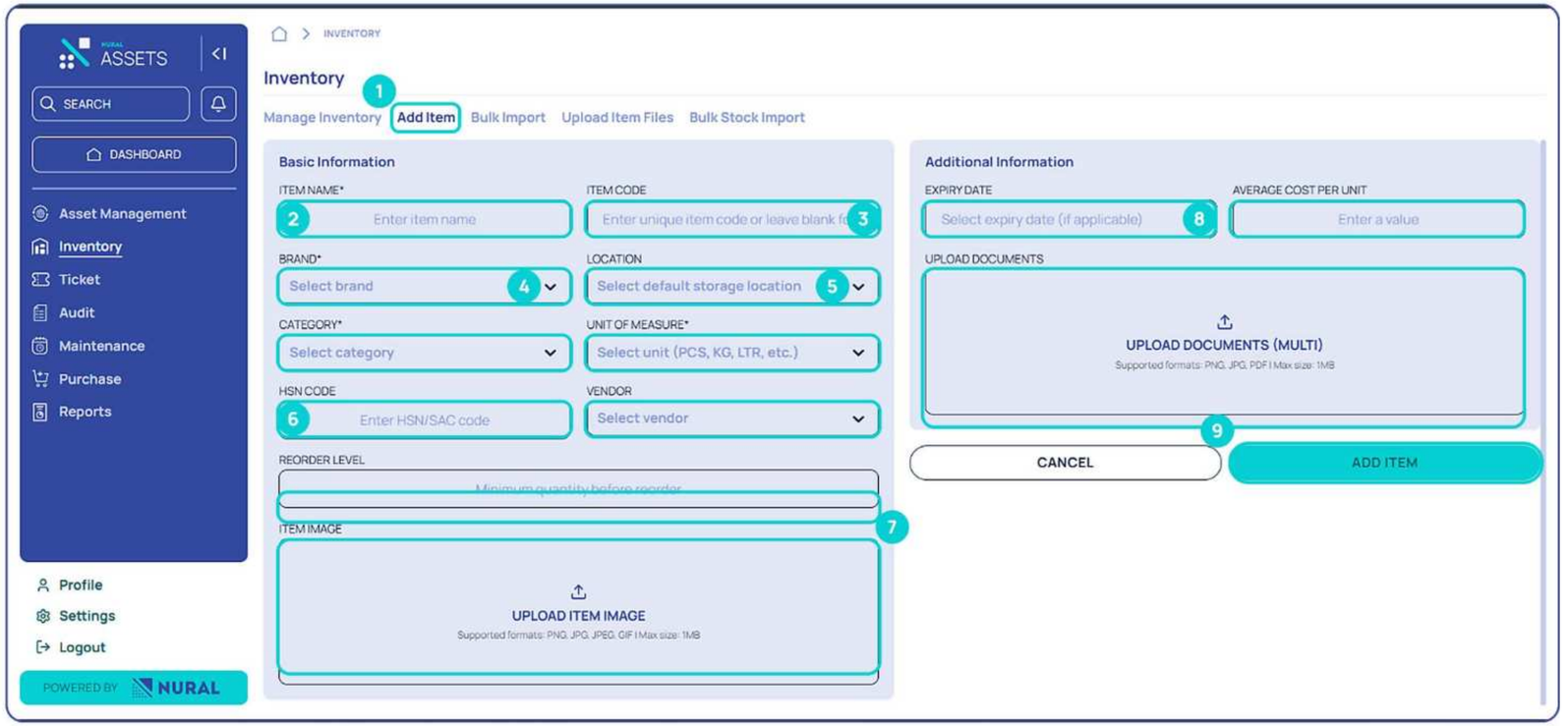


Figure 55 - Add Item

The Inventory module tracks consumable and stock items - such as accessories, spares, and supplies - that are issued against assets or drawn for day-to-day use. You can add items one at a time, import many items or their stock quantities from spreadsheets, attach item images in bulk, and manage stock levels, units, and reorder points from a single list. Inventory is available from the main navigation menu.

STEPS

1. Go to: Inventory, then open the Add Item tab.
2. Under Basic Information, in Item Name (mandatory), enter the name of the item.
3. In Item Code, enter a unique code for the item, or leave it blank to auto-generate one.
4. From the Brand dropdown (mandatory), select the item's brand, and from the Category dropdown (mandatory), select its category.
5. From the Location dropdown, select the default storage location, and from the Unit of Measure dropdown (mandatory), select the unit (PCS, KG, LTR, etc.).

Add Item

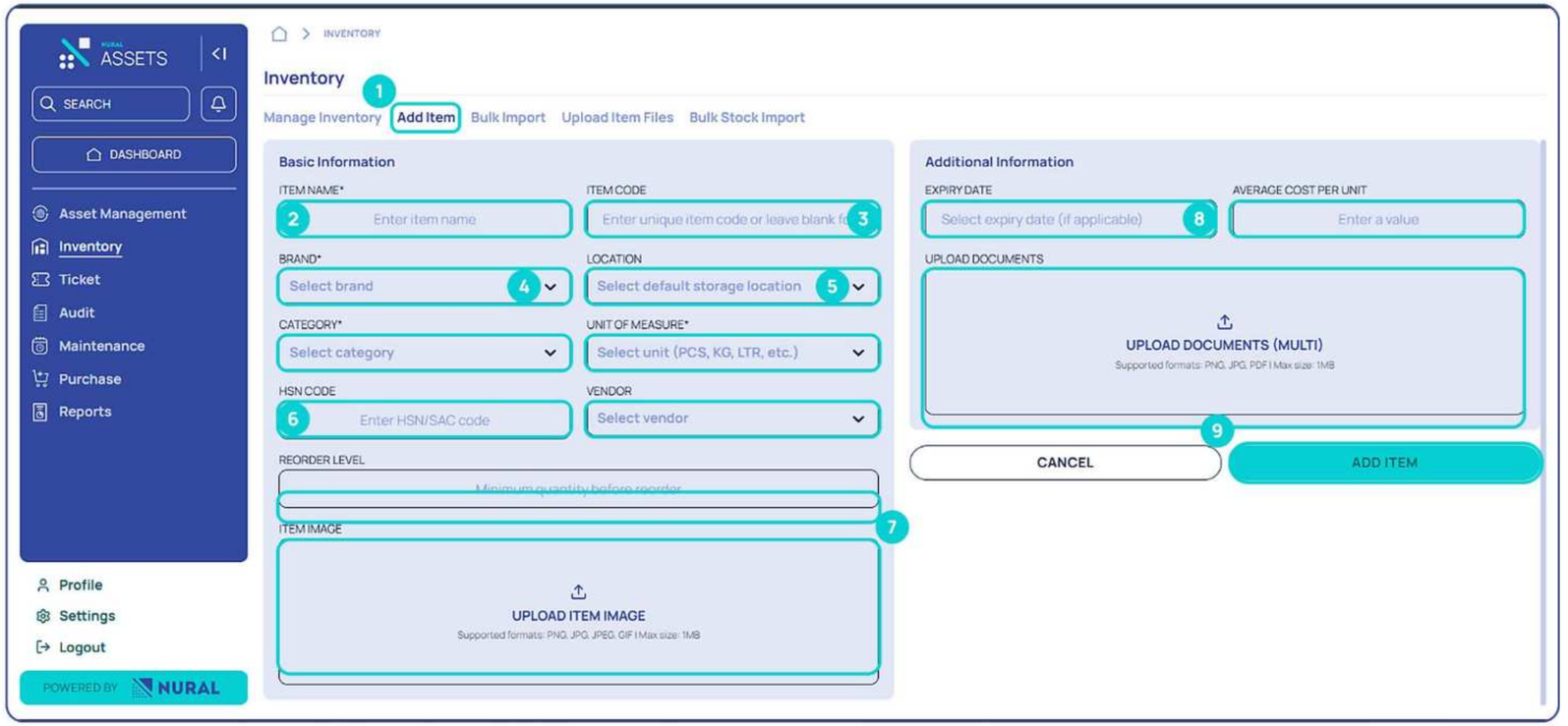


Figure 55 - Add Item

STEPS, CONTINUED

6. Optionally enter the HSN Code, select the Vendor, and set the Reorder Level (the minimum quantity before the item should be reordered).

7. To add a photo, click Upload Item Image and select a PNG, JPG, JPEG, or GIF file (maximum size 1 MB).

8. Under Additional Information, optionally set the Expiry Date (if applicable) and the Average Cost Per Unit, and click Upload Documents to attach one or more files (PNG, JPG, or PDF, maximum 1 MB each).

9. Click ADD ITEM to save the item, or click CANCEL to discard it. The new item appears in the Manage Inventory list.

Bulk Import

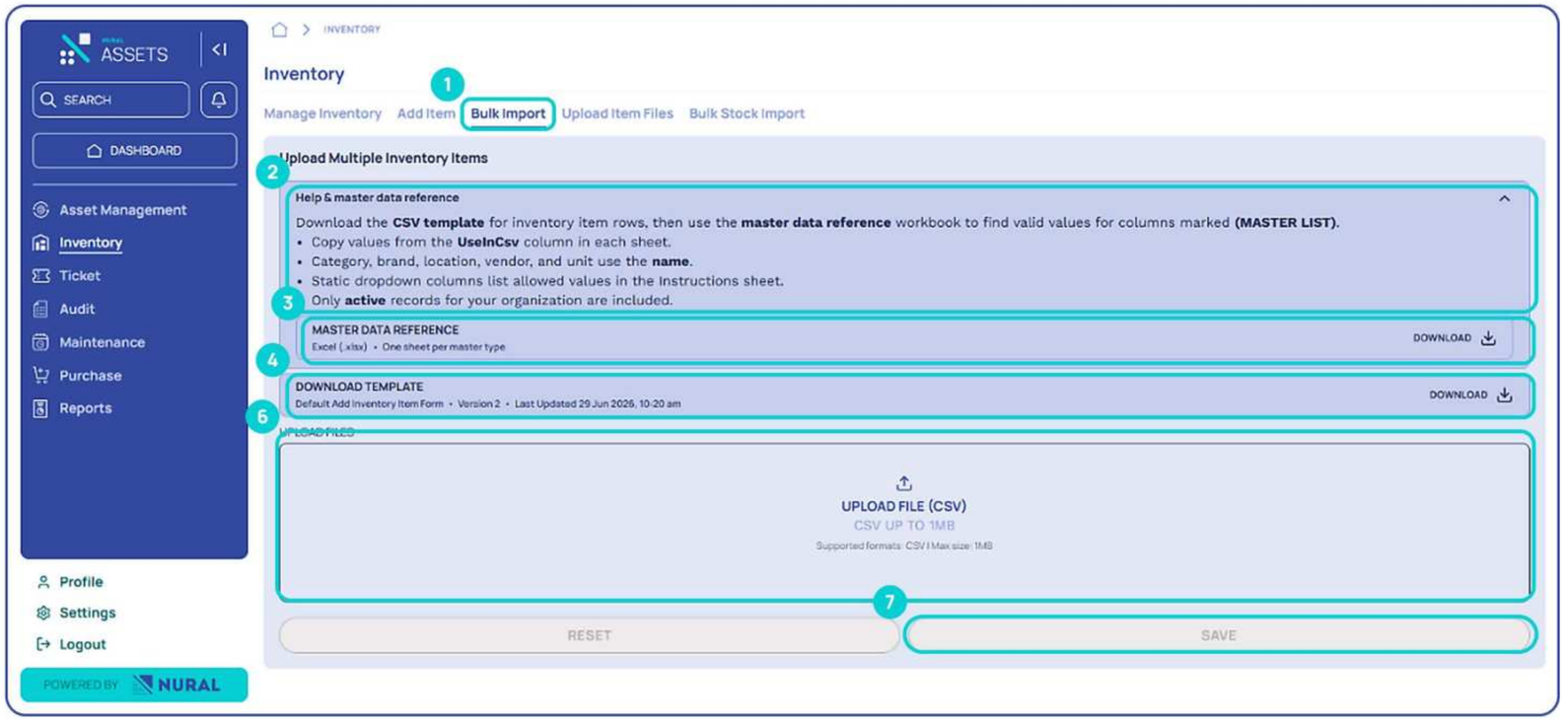


Figure 56 - Inventory › Bulk Import

STEPS

1. Go to: Inventory, then open the Bulk Import tab.
2. Expand Help & master data reference for guidance on the columns marked (MASTER LIST).
3. Under Master Data Reference, click DOWNLOAD to get the Excel workbook (one sheet per master type) listing the valid values. Copy values from the UseInCsv column, and use the name for the category, brand, location, vendor, and unit columns.
4. Under Download Template, click DOWNLOAD to get the current Add Inventory Item template. The version and last-updated date are shown beside it.
5. Fill in the template with one item per row, using only active master data values for your organisation.
6. Under Upload Files, click UPLOAD FILE (CSV) and select your completed file (CSV format, maximum size 1 MB).
7. Click SAVE to import the items, or click RESET to clear the selected file and start over.

Upload Item Files



Figure 57 - Upload Item Files

STEPS

1. Go to: Inventory, then open the Upload Item Files tab.
2. Under Upload Inventory Item Files, drag and drop the item images (PNG or JPG, maximum 1 MB each). Multiple files are allowed.
3. Select the control type - choose the image field from the dropdown that matches the files you uploaded.
4. Download the CSV template using the download icon to get a blank CSV with the column headers only.
5. Open the CSV and enter the item codes and matching file names in the itemCode and image-field columns.
6. Upload the completed CSV, review the mapping table, then click SAVE (or click RESET to start over).

Bulk Stock Import

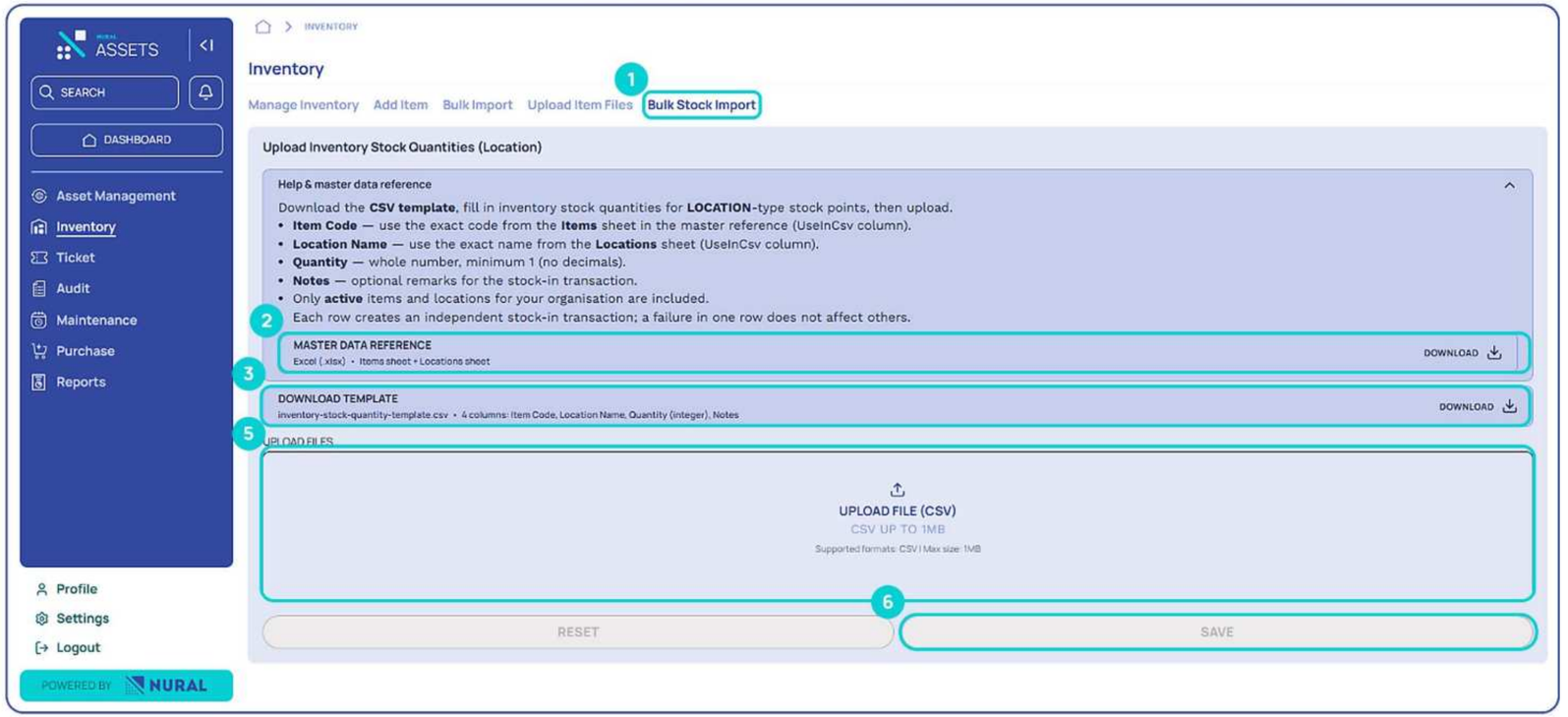


Figure 58 - Bulk Stock Import

STEPS

1. Go to: Inventory, then open the Bulk Stock Import tab. This uploads opening stock quantities for Location-type stock points.
2. Expand Help & master data reference, then under Master Data Reference click DOWNLOAD to get the Excel workbook (Items sheet + Locations sheet) listing the valid Item Codes and Location Names.
3. Under Download Template, click DOWNLOAD to get inventory-stock-quantity-template.csv, which has four columns: Item Code, Location Name, Quantity (integer), and Notes.
4. Fill in the template: use the exact Item Code from the Items sheet and Location Name from the Locations sheet (UseInCsv column), enter a whole-number Quantity (minimum 1), and add optional Notes for the stock-in transaction.
5. Under Upload Files, click UPLOAD FILE (CSV) and select your completed file (CSV format, maximum size 1 MB).
6. Click SAVE to import the stock quantities, or click RESET to start over. Each row creates an independent stock-in transaction, so a failure in one row does not affect the others.

Manage Inventory

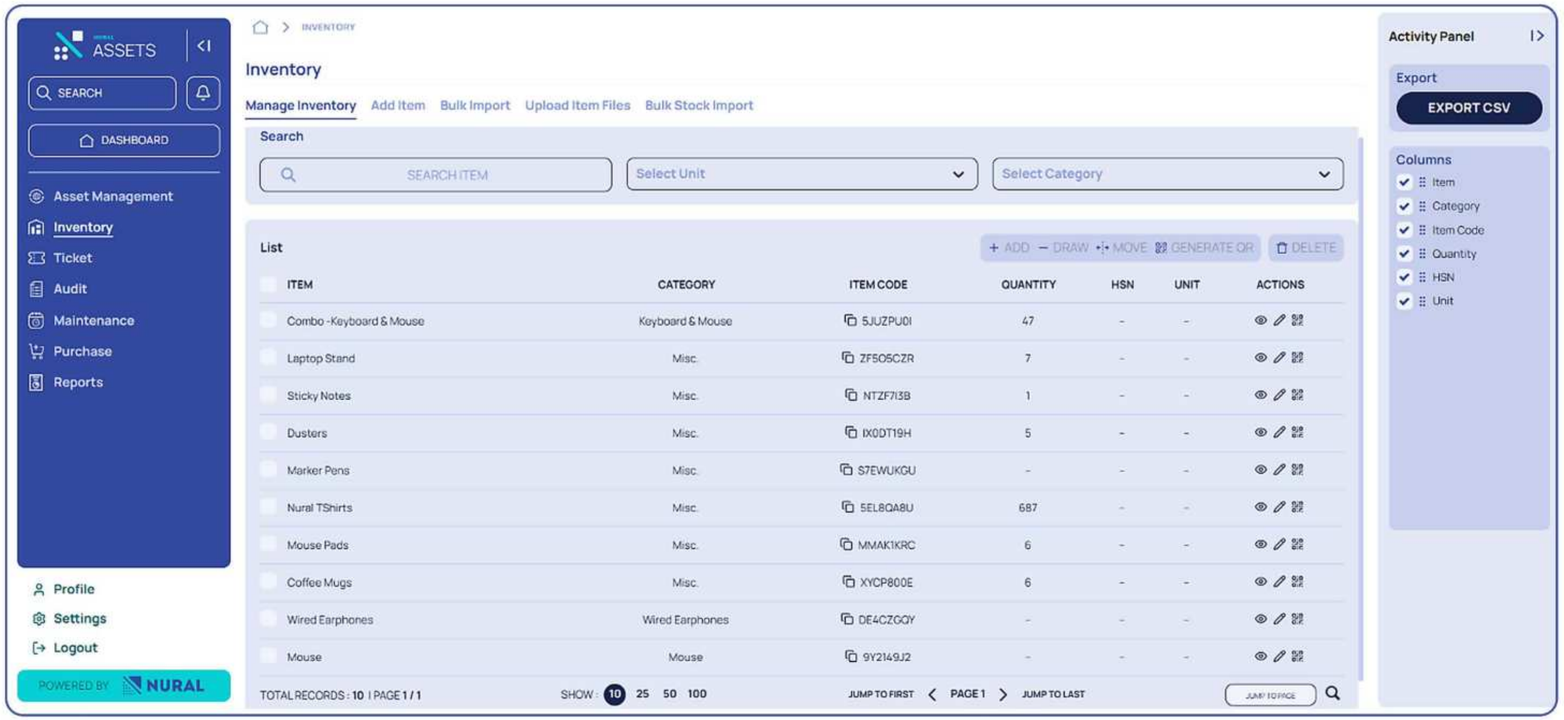


Figure 59 - Manage Inventory

STEPS

1. Go to: Inventory. The Manage Inventory tab is the default view and lists every item with its Item, Category, Item Code, Quantity, HSN, and Unit.
2. To find an item, type in Search Item and/or filter by the Unit and Category dropdowns.
3. Use the row action icons in the Actions column to view an item, edit it, or generate its QR code.
4. Select the items you want to act on using the checkboxes; the toolbar above the list then enables the following stock actions.
5. Add - record a stock-in that increases the selected item's quantity (enter the quantity, location, and any notes).
6. Draw - issue or consume stock, reducing the selected item's quantity.

Manage Inventory

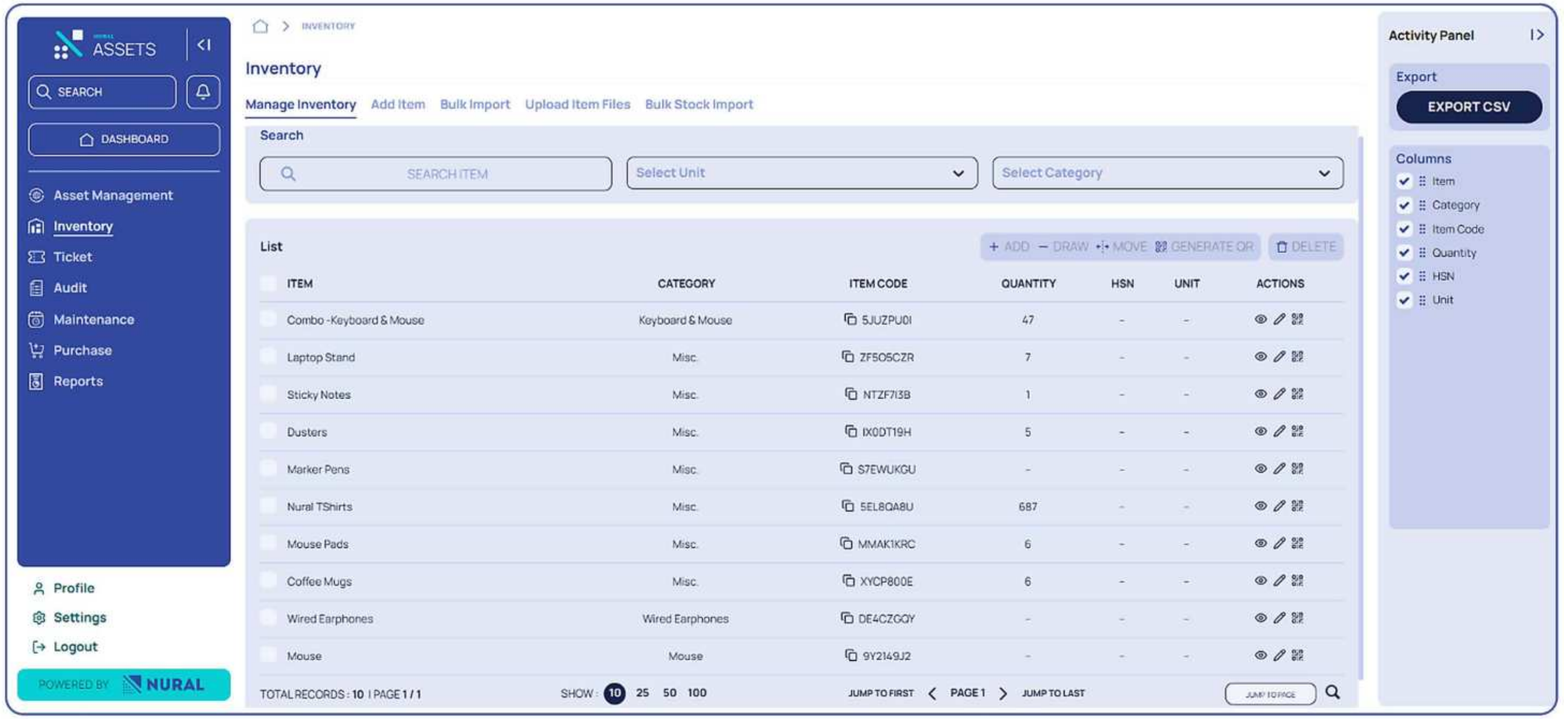


Figure 59 - Manage Inventory

STEPS, CONTINUED

7. Move - transfer stock of the selected item from one location to another.
8. Generate QR - generate and download QR codes for the selected items.
9. Delete - remove the selected items from the inventory.
10. In the Activity Panel, use the Columns options to show or hide columns (Item, Category, Item Code, Quantity, HSN, Unit), and click EXPORT CSV under Export to download the list.
11. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

New Ticket

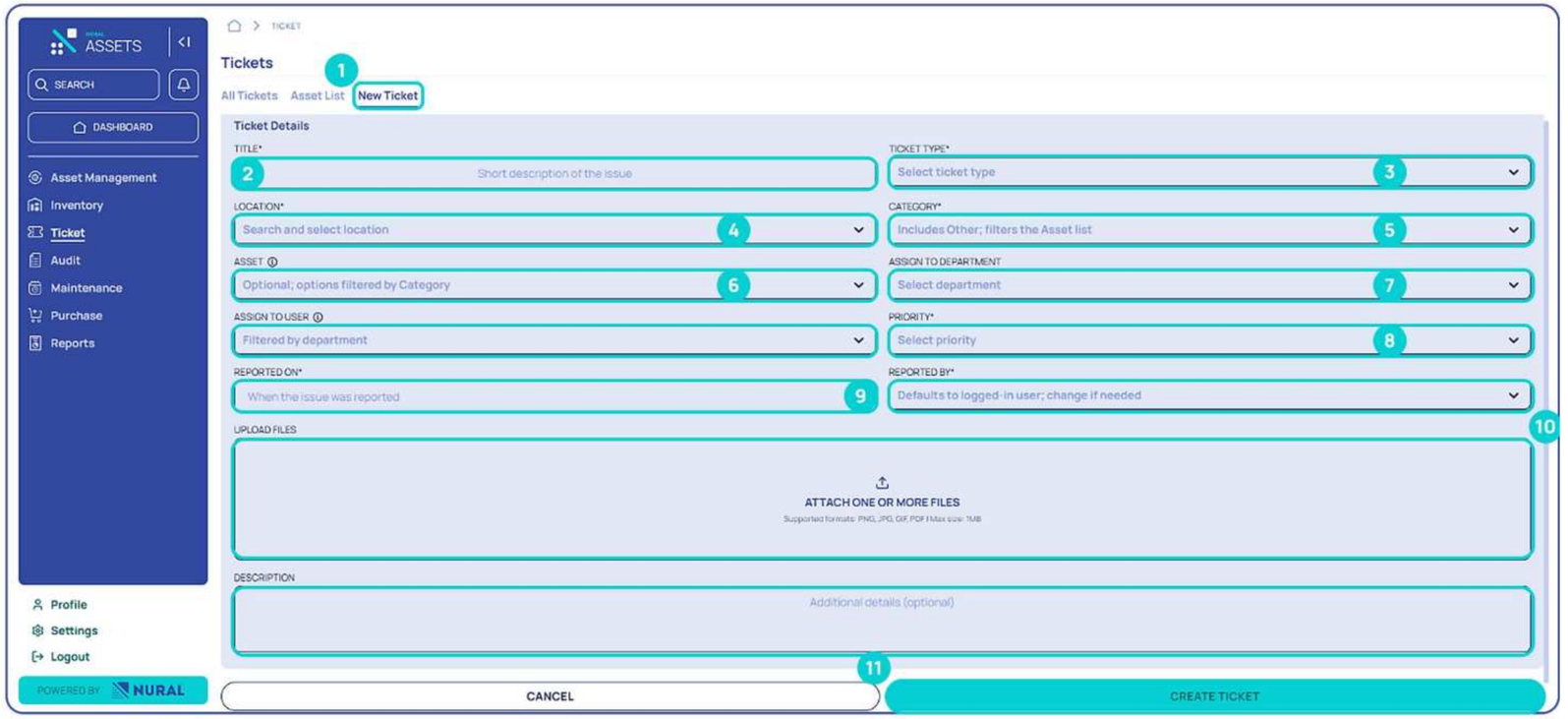


Figure 60 - New Ticket

The Ticket module lets users raise and track support and service requests against assets - for example, a hardware fault or a software issue. Each ticket captures the asset, ticket type, priority, assignment, and status, and moves through an Open → In Progress → Closed lifecycle. Tickets are available from the main navigation menu under Ticket.

STEPS

1. Go to: Ticket, then open the New Ticket tab.
2. In Title (mandatory), enter a short description of the issue.
3. From the Ticket Type dropdown (mandatory), select the type of issue - for example, Hardware issues or Software issues.
4. From the Location dropdown (mandatory), search and select the location where the issue occurred.
5. From the Category dropdown (mandatory), select the asset category; this filters the Asset list and includes an Other option.
6. From the Asset dropdown, optionally select the specific asset the ticket relates to (the options are filtered by the selected Category).

New Ticket

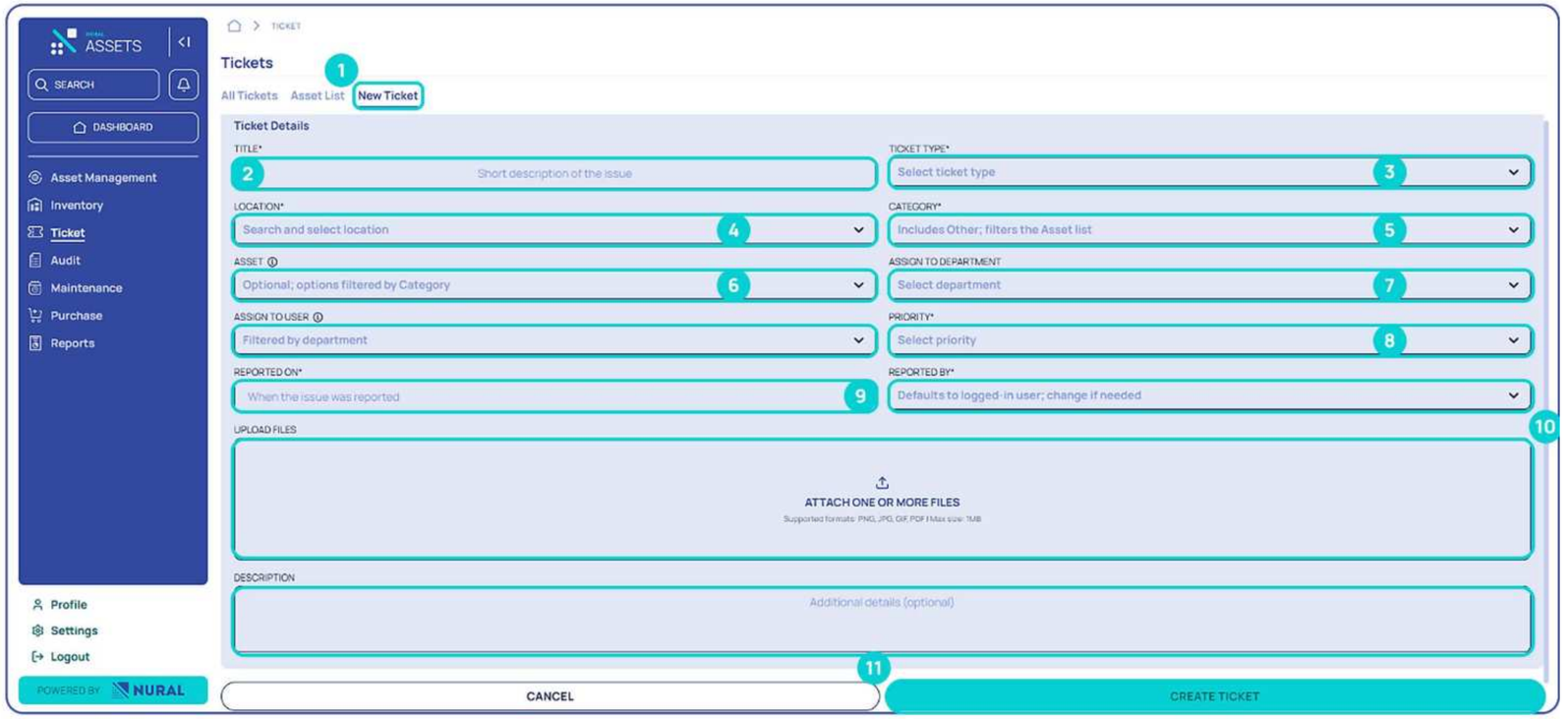


Figure 60 - New Ticket

STEPS, CONTINUED

7. From the Assign to Department dropdown, select the department that will handle the ticket, then from the Assign to User dropdown select the user (the list is filtered by the selected department).

8. From the Priority dropdown (mandatory), set the ticket priority - for example, Low, Medium, High, or Critical.

9. In Reported On (mandatory), set when the issue was reported, and in Reported By (mandatory) confirm the reporter (this defaults to the logged-in user; change it if needed).

10. Under Upload Files, optionally attach one or more files (PNG, JPG, GIF, or PDF, maximum 1 MB each), and add any Description (optional).

11. Click CREATE TICKET to raise the ticket, or click CANCEL to discard it. The new ticket appears in the All Tickets list.

Asset List

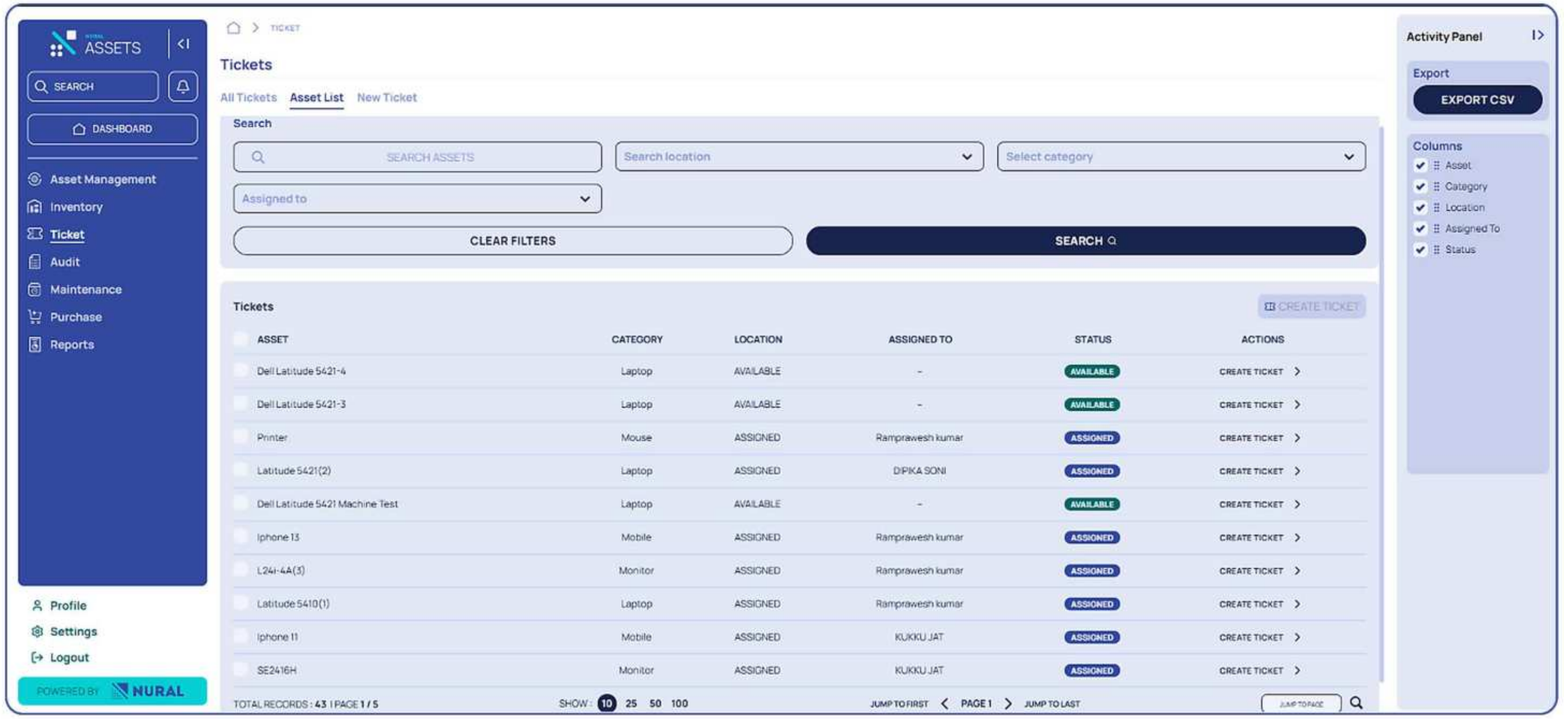


Figure 61 - Asset List

STEPS

1. Go to: Ticket, then open the Asset List tab. This lists your assets with their Category, Location, Assigned To, and Status, so you can raise a ticket for a specific asset.
2. To find an asset, type in Search Assets and/or filter by the Search Location, Category, and Assigned To dropdowns, then click SEARCH. Click CLEAR FILTERS to reset.
3. Locate the asset you want to raise a ticket for, then click CREATE TICKET in its row.
4. Complete the ticket details as described in New Ticket above - the selected asset is pre-filled - and save the ticket.
5. In the Activity Panel, use the Columns options to show or hide columns (Asset, Category, Location, Assigned To, Status), and click EXPORT CSV under Export to download the list.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

All Tickets

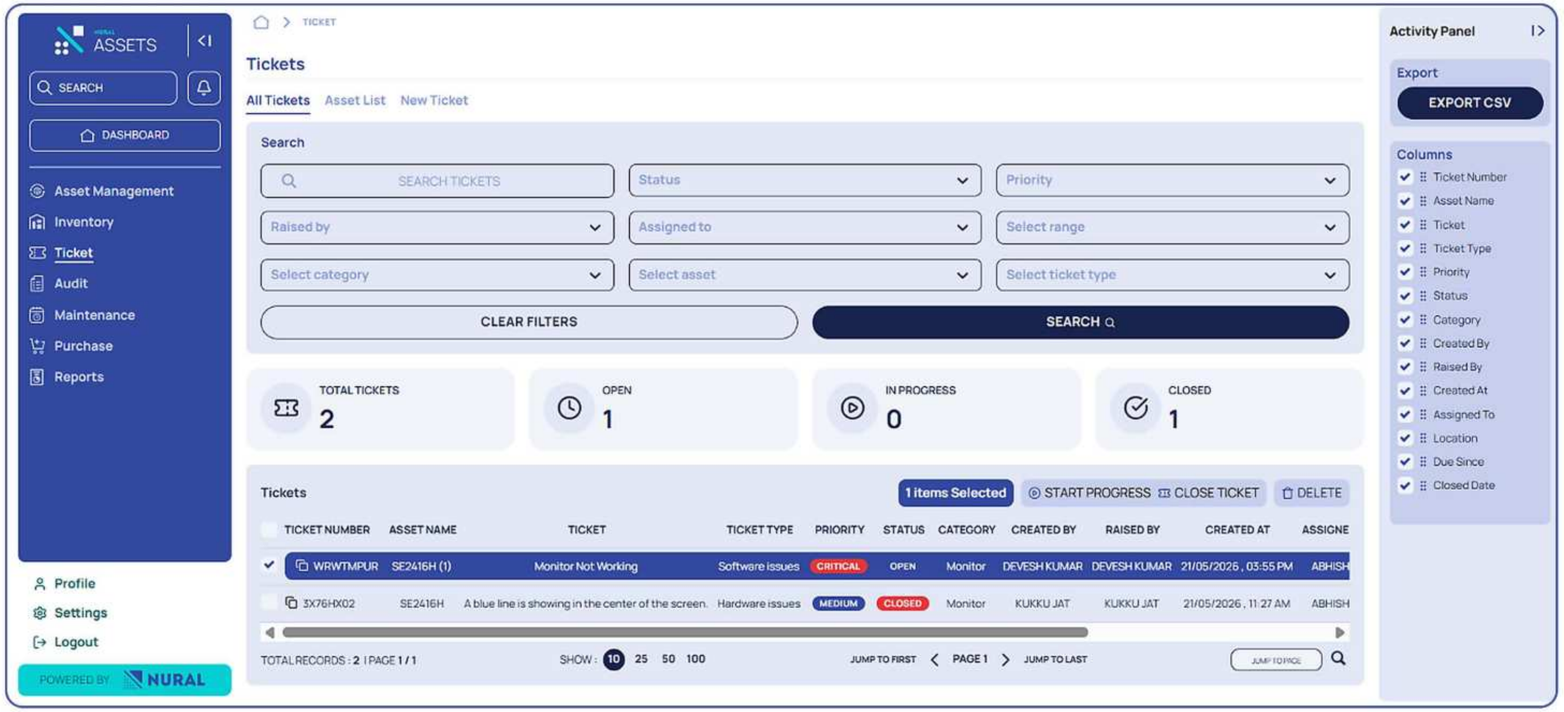


Figure 62 - All Tickets

STEPS

1. Go to: Ticket. The All Tickets tab is the default view and lists every ticket with its Ticket Number, Asset Name, Ticket title, Ticket Type, Priority, Status, Category, Created By, Raised By, Created At, and Assigned To.
2. Use the summary cards at the top to see the count of Total Tickets, Open, In Progress, and Closed tickets.
3. To find a ticket, type in Search Tickets and/or filter by the Status, Priority, Raised By, Assigned To, date range, Category, Asset, and Ticket Type dropdowns, then click SEARCH. Click CLEAR FILTERS to reset.
4. Select a ticket using its checkbox to enable the actions above the list.
5. Start Progress - move the selected Open ticket into the In Progress state.
6. Close Ticket - mark the selected ticket as Closed once the issue is resolved.
7. Delete - remove the selected ticket.
8. In the Activity Panel, use the Columns options to show or hide columns, and click EXPORT CSV under Export to download the list.
9. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

Create Audit

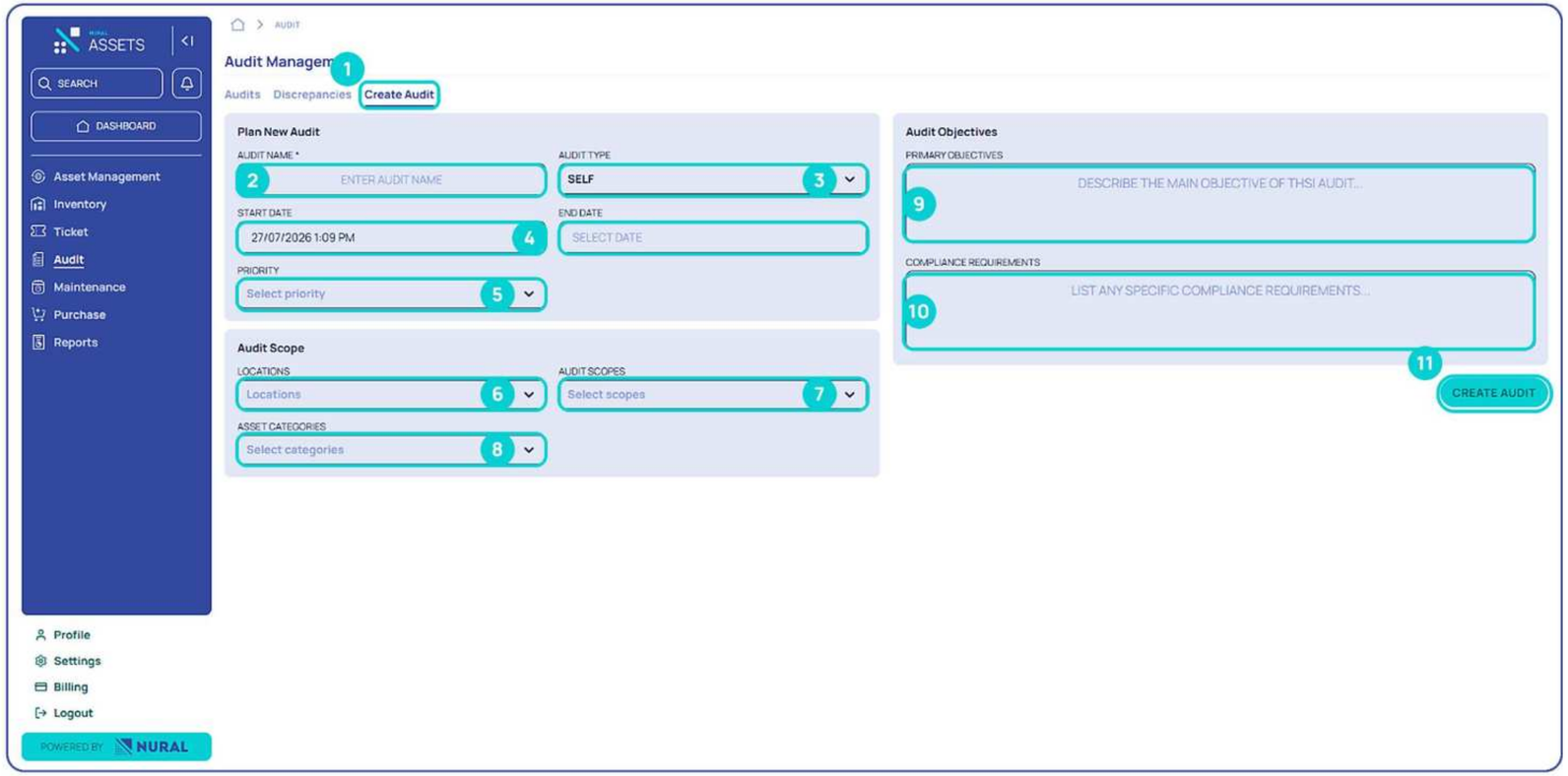


Figure 63 - Create Audit

The Audit module lets users plan, run, and track physical verification audits of assets. Each audit captures its name, type, schedule, priority, scope, and objectives, and records any mismatches found during verification as discrepancies that can be reviewed and resolved. Audits are available from the main navigation menu under Audit.

STEPS

1. Go to: Audit, then open the Create Audit tab.
2. Under Plan New Audit, in Audit Name (mandatory), enter a name that identifies the audit.
3. From the Audit Type dropdown, select the type of audit - for example, Self or External.
4. In Start Date, set the date and time the audit begins (this defaults to the current date and time), and in End Date select the date the audit is scheduled to finish.
5. From the Priority dropdown, select the priority of the audit.
6. Under Audit Scope, from the Locations dropdown, select the locations the audit will cover.

Create Audit

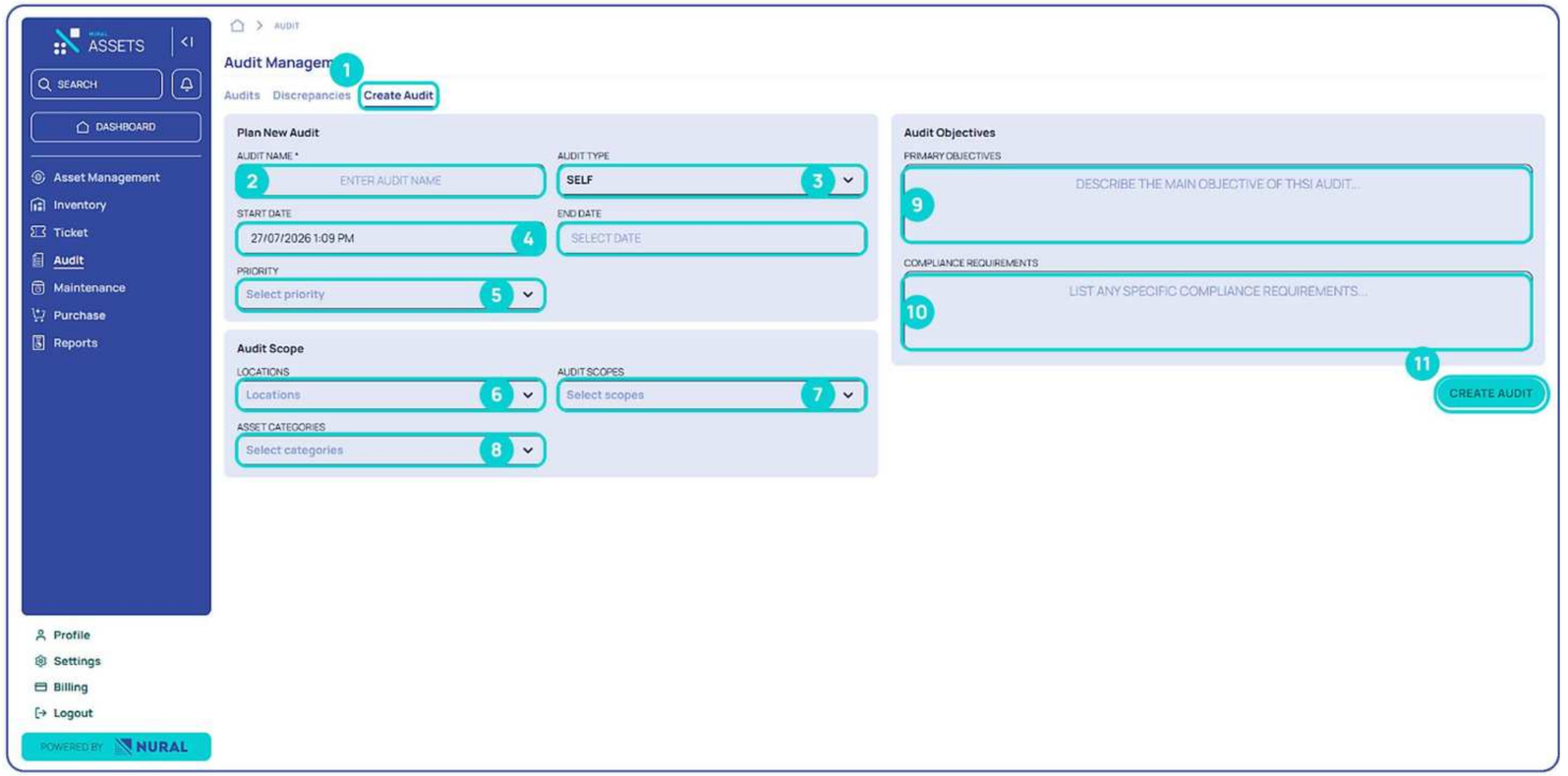


Figure 63 - Create Audit

STEPS, CONTINUED

7. From the Audit Scopes dropdown, select the scopes to be verified during the audit.
8. From the Asset Categories dropdown, select the asset categories to be included.
9. Under Audit Objectives, in Primary Objectives, describe the main objective of this audit.
10. In Compliance Requirements, list any specific compliance requirements that apply.
11. Click CREATE AUDIT to save. The new audit appears in the Audits list with the status Planned.

Audits

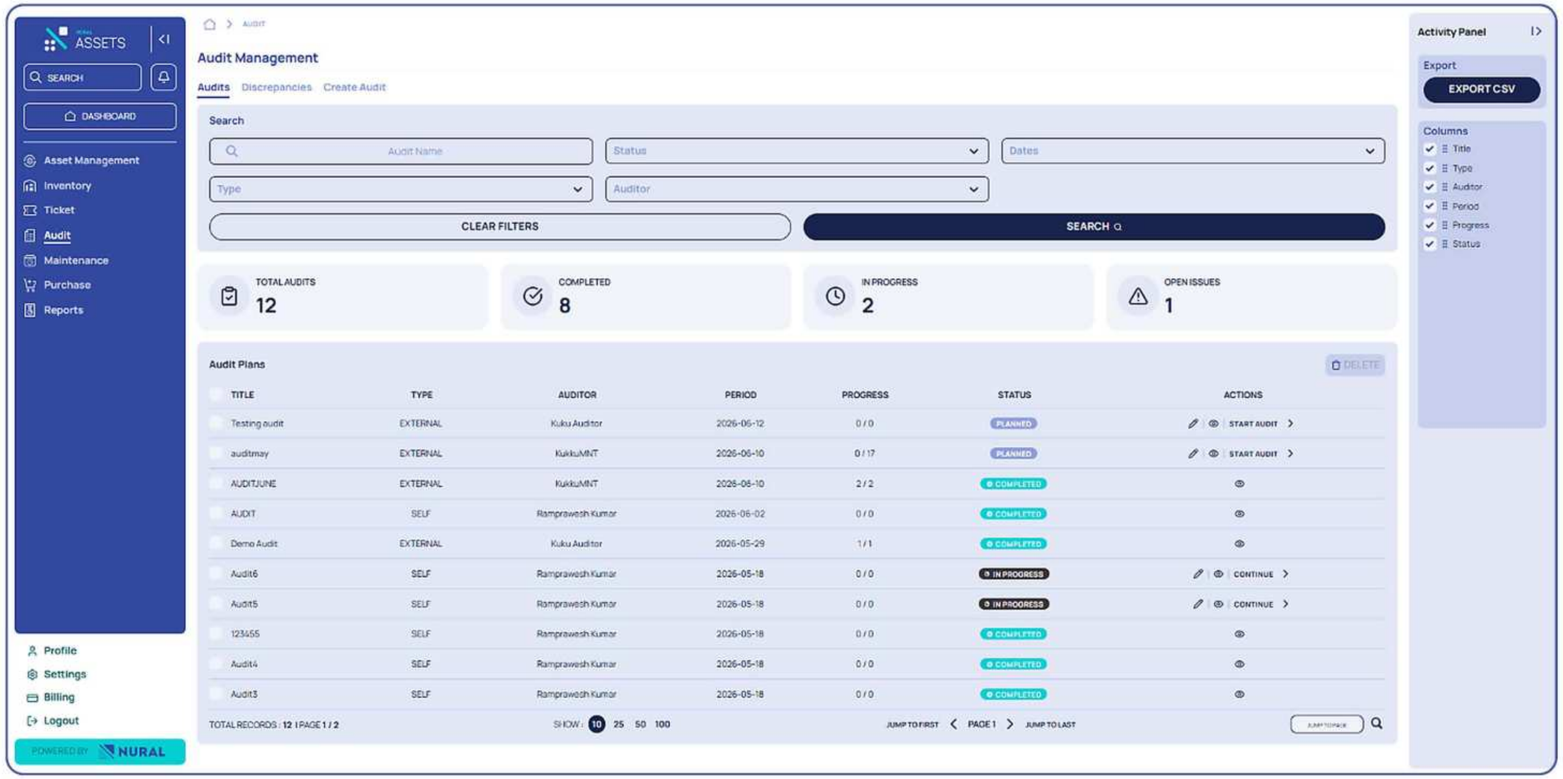


Figure 64 - Audits

STEPS

1. Go to: Audit. The Audits tab is the default view and lists every audit plan with its Title, Type, Auditor, Period, Progress, and Status.
2. Use the summary cards at the top to see the count of Total Audits, Completed, In Progress, and Open Issues.
3. To find an audit, type in Audit Name and/or filter by the Status, Dates, Type, and Auditor dropdowns, then click SEARCH. Click CLEAR FILTERS to reset.
4. To edit an audit, click the edit (pencil) icon in the Actions column of its row, update the fields, and save your changes. Click the view (eye) icon to open the audit details.
5. Click START AUDIT on a Planned audit to begin verification, or click CONTINUE on an audit that is In Progress to resume it.
6. To delete audits, select the checkbox(es) beside the required rows and click DELETE above the list.
7. In the Activity Panel, use the Columns options to show or hide columns (Title, Type, Auditor, Period, Progress, Status), and click EXPORT CSV under Export to download the list.
8. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

Discrepancies



Figure 65 - Discrepancies

STEPS

1. Go to: Audit, then open the Discrepancies tab. The list shows every mismatch raised during an audit, with its Asset, Audit Name, Category, Discrepancy Type, Location, Auditor, Date, and Status.
2. Use the summary cards at the top to see the count of Total Audits, Completed, In Progress, and Open Issues.
3. To find a discrepancy, type in Search and/or filter by the Status, Location, Category, Auditor, and Discrepancy Type dropdowns, then click SEARCH. Click CLEAR FILTERS to reset.
4. Click the view (eye) icon in the Actions column of a row to open the discrepancy details.
5. To close a discrepancy, click RESOLVE in its row, or select the checkbox(es) beside the required rows and click RESOLVE above the list; the number of selected rows is shown as items Selected.
6. In the Activity Panel, use the Columns options to show or hide columns (Asset, Audit Name, Category, Discrepancy Type, Location, Auditor, Date, Status), and click EXPORT CSV under Export to download the list.
7. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

Create Schedule



Figure 66 - Create Schedule

The Maintenance module lets users schedule and track preventive and corrective maintenance for assets. Each schedule captures the location, asset, maintenance type, frequency, department, assigned technician, duration, and cost, and tracks the work through its due, overdue, and completed states. Maintenance is available from the main navigation menu under Maintenance.

STEPS

1. Go to: Maintenance, then open the Create Schedule tab.
2. Under Maintenance Schedule Information, from the Location dropdown (mandatory), select the location where the maintenance will be carried out.
3. From the Select Category dropdown (optional), select the asset category, and from the Select Asset dropdown (optional), select the specific asset to be maintained.
4. From the Maintenance Type dropdown (mandatory), select the type of maintenance - for example, Preventive or Corrective.
5. From the Frequency dropdown (mandatory), select how often the maintenance repeats - for example, Daily, Weekly, Monthly, or Custom.
6. From the Department dropdown (mandatory), select the department responsible for the work, and from the Assigned To dropdown (mandatory), select the technician who will perform it.

Create Schedule



Figure 66 - Create Schedule

STEPS, CONTINUED

7. In Start Date (mandatory) and End Date (mandatory), set the period over which the schedule runs.
8. In Notify Before (Days) (mandatory), enter how many days in advance the reminder should be sent.
9. Under Maintenance Details, in Description, describe the maintenance activities (maximum 500 characters), and in Instructions, provide detailed maintenance instructions (maximum 1000 characters).
10. In Estimated Duration (Hours) and Estimated Cost, enter the expected effort and cost for the work.
11. Click SCHEDULE MAINTENANCE to save, or click CANCEL to discard. The new schedule appears in the Maintenance List.

Maintenance List

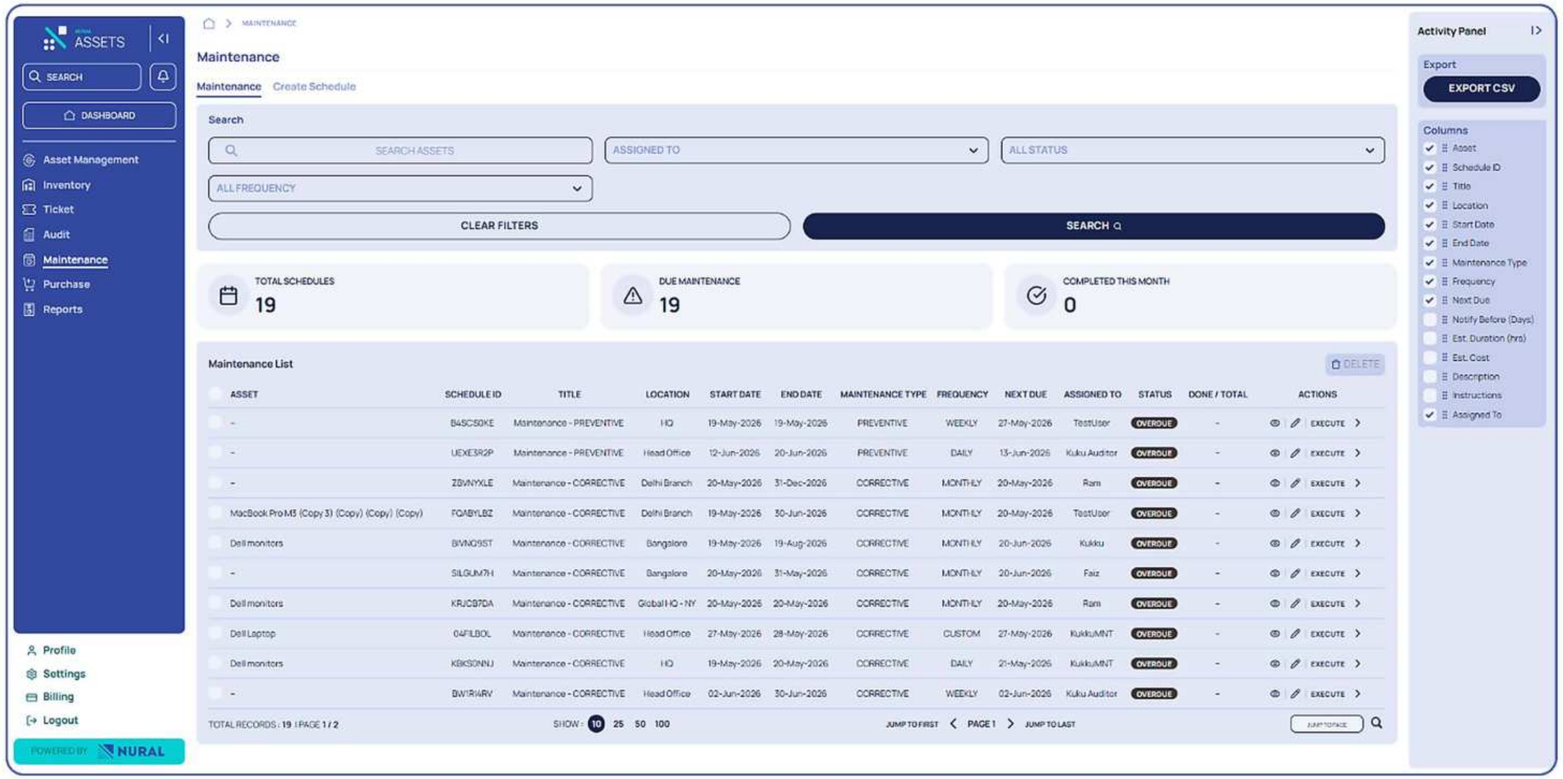


Figure 67 - Maintenance List

STEPS

1. Go to: Maintenance. The Maintenance tab is the default view and lists every schedule with its Asset, Schedule ID, Title, Location, Start Date, End Date, Maintenance Type, Frequency, Next Due, Assigned To, Status, and Done / Total.
2. Use the summary cards at the top to see the count of Total Schedules, Due Maintenance, and Completed This Month.
3. To find a schedule, type in Search Assets and/or filter by the Assigned To, All Status, and All Frequency dropdowns, then click SEARCH. Click CLEAR FILTERS to reset.
4. Click the view (eye) icon in the Actions column of a row to open the schedule details, or click the edit (pencil) icon to update the fields and save your changes.
5. Click EXECUTE on a row to record the maintenance activity for that schedule.
6. To delete schedules, select the checkbox(es) beside the required rows and click DELETE above the list.
7. In the Activity Panel, use the Columns options to show or hide columns (Asset, Schedule ID, Title, Location, Start Date, End Date, Maintenance Type, Frequency, Next Due, Notify Before, Est. Duration, Est. Cost, Description, Instructions, Assigned To), and click EXPORT CSV under Export to download the list.
8. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

Create Requisition



Figure 68 - Create Requisition

The Purchase module covers the full procurement cycle - raising a purchase requisition (PR), converting it into a purchase order (PO) for a vendor, and recording the goods received against that PO as a Goods Receipt Note (GRN). Summary cards at the top of the module show Total PRs, Pending Items, Total GRNs, Active Vendors, and Total POs. Purchase is available from the main navigation menu under Purchase.

STEPS

1. Go to: Purchase, then open the Create Requisition tab.
2. Under Basic Information, from the Department dropdown (mandatory), select the requesting department, and from the Requested By dropdown (mandatory), select the user raising the request.
3. In Request Date (mandatory), confirm the date (this defaults to the current date), and in Required Date (mandatory), select the date by which the items are needed.
4. From the Location dropdown (mandatory), select the delivery location, and from the Priority dropdown (mandatory), set the urgency (the default is LOW).
5. From the PR Request Type dropdown (mandatory), select the type of request - for example, Standard.
6. Select the Emergency Requisition checkbox if the request must be treated as urgent.
7. In Justification, enter the business justification for the purchase.

Create Requisition



Figure 68 - Create Requisition

STEPS, CONTINUED

8. Under Requested Items, for Item 1, select the Requested Type (mandatory) and the Item Type (mandatory).
9. From the Unit dropdown, select the unit of measure, and in Quantity (mandatory), enter the number required.
10. In Unit Price (mandatory), enter the rate; Total Cost (mandatory) is calculated automatically from the quantity and unit price.
11. Complete the remaining item details as required - Remarks, Item Code, HSN Code, Available Stock (mandatory), Category Name, Brand, and Model.
12. Click ADD ITEM to add another item to the same requisition, or click the delete (bin) icon on an item panel to remove that item.
13. Click CREATE PR to save. The new requisition appears in the Purchase Requisitions list with the status DRAFT.

Purchase Requisitions

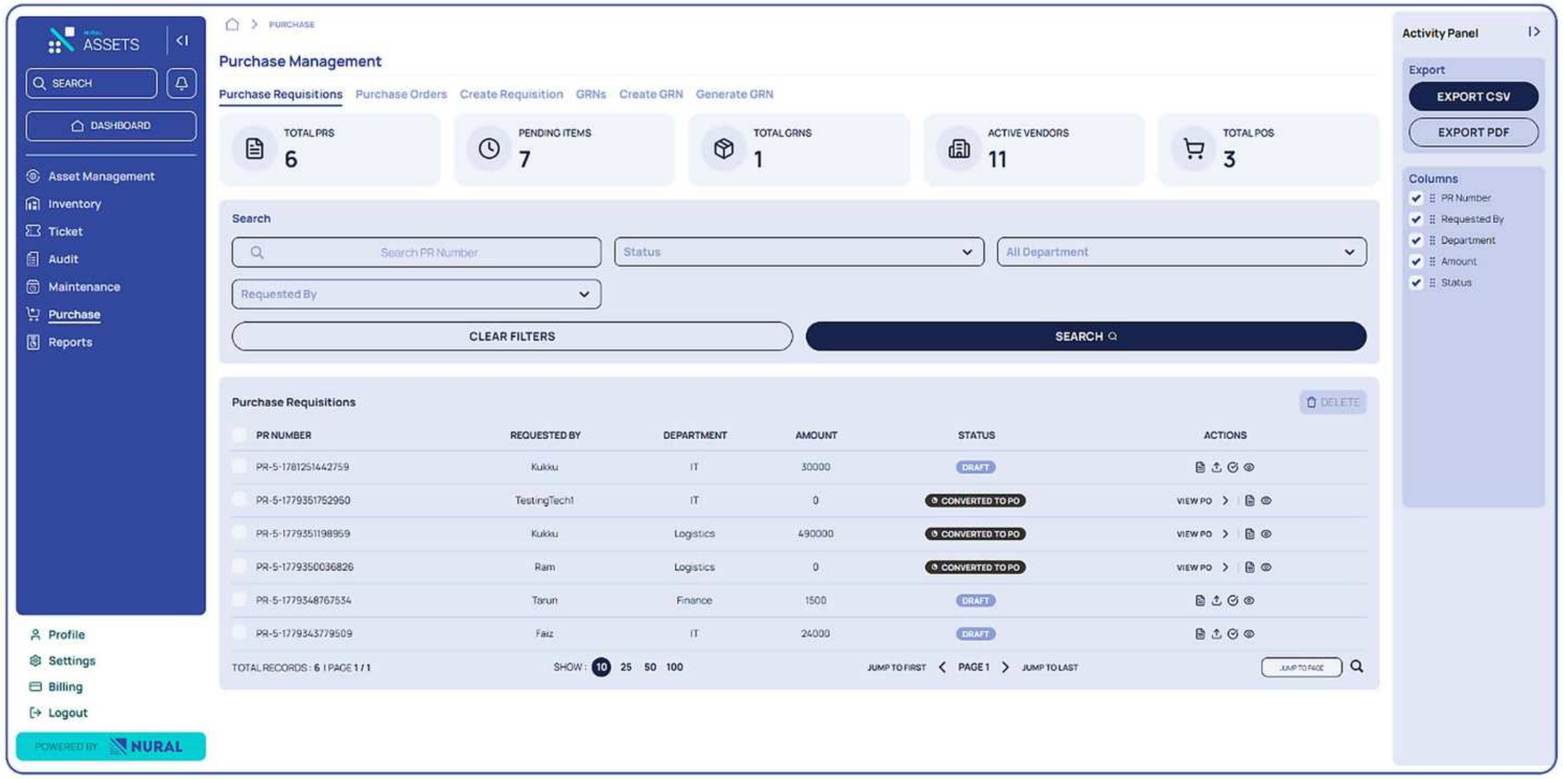


Figure 69 - Purchase Requisitions

STEPS

1. Go to: Purchase. The Purchase Requisitions tab is the default view and lists every requisition with its PR Number, Requested By, Department, Amount, and Status.
2. Use the summary cards at the top to see the count of Total PRs, Pending Items, Total GRNs, Active Vendors, and Total POs.
3. To find a requisition, type in Search PR Number and/or filter by the Status, All Department, and Requested By dropdowns, then click SEARCH. Click CLEAR FILTERS to reset.
4. For a requisition in DRAFT status, use the icons in the Actions column to view the PR document, upload a quotation, approve the requisition, or open its details (eye icon).
5. Once a requisition has been approved and converted, its status changes to CONVERTED TO PO; click VIEW PO to open the resulting purchase order.
6. To delete requisitions, select the checkbox(es) beside the required rows and click DELETE above the list.
7. In the Activity Panel, use the Columns options to show or hide columns (PR Number, Requested By, Department, Amount, Status), and click EXPORT CSV or EXPORT PDF under Export to download the list.
8. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

Purchase Orders

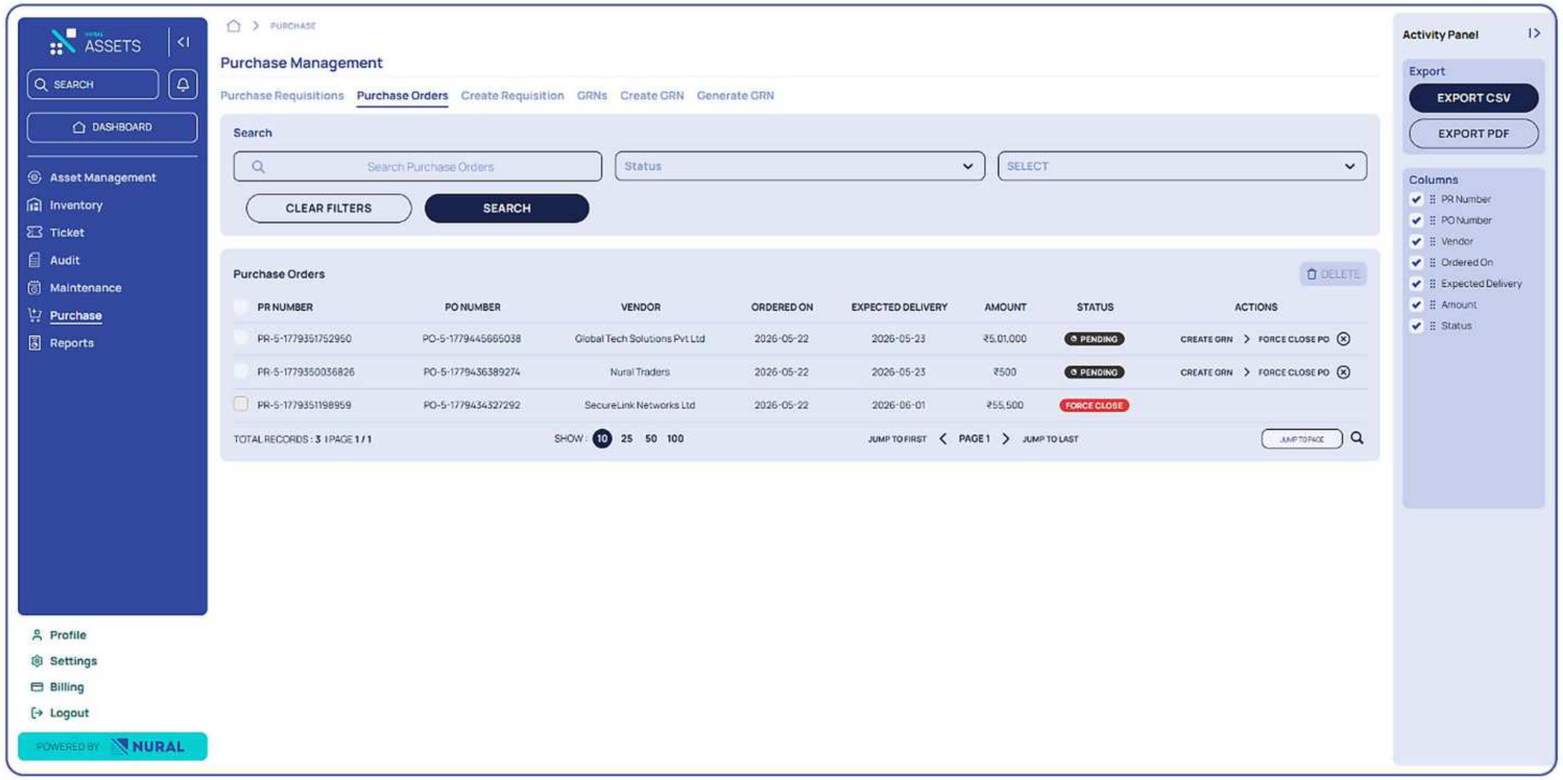


Figure 70 - Purchase Orders

STEPS

1. Go to: Purchase, then open the Purchase Orders tab. The list shows every purchase order with its PR Number, PO Number, Vendor, Ordered On, Expected Delivery, Amount, and Status.
2. To find a purchase order, type in Search Purchase Orders and/or use the Status and other filter dropdowns, then click SEARCH. Click CLEAR FILTERS to reset.
3. For a PO with the status PENDING, click CREATE GRN in the Actions column to record the goods received against that order.
4. Click FORCE CLOSE PO to close a purchase order that will not be fulfilled; its status changes to FORCE CLOSE.
5. To delete purchase orders, select the checkbox(es) beside the required rows and click DELETE above the list.
6. In the Activity Panel, use the Columns options to show or hide columns (PR Number, PO Number, Vendor, Ordered On, Expected Delivery, Amount, Status), and click EXPORT CSV or EXPORT PDF under Export to download the list.
7. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

Create GRN

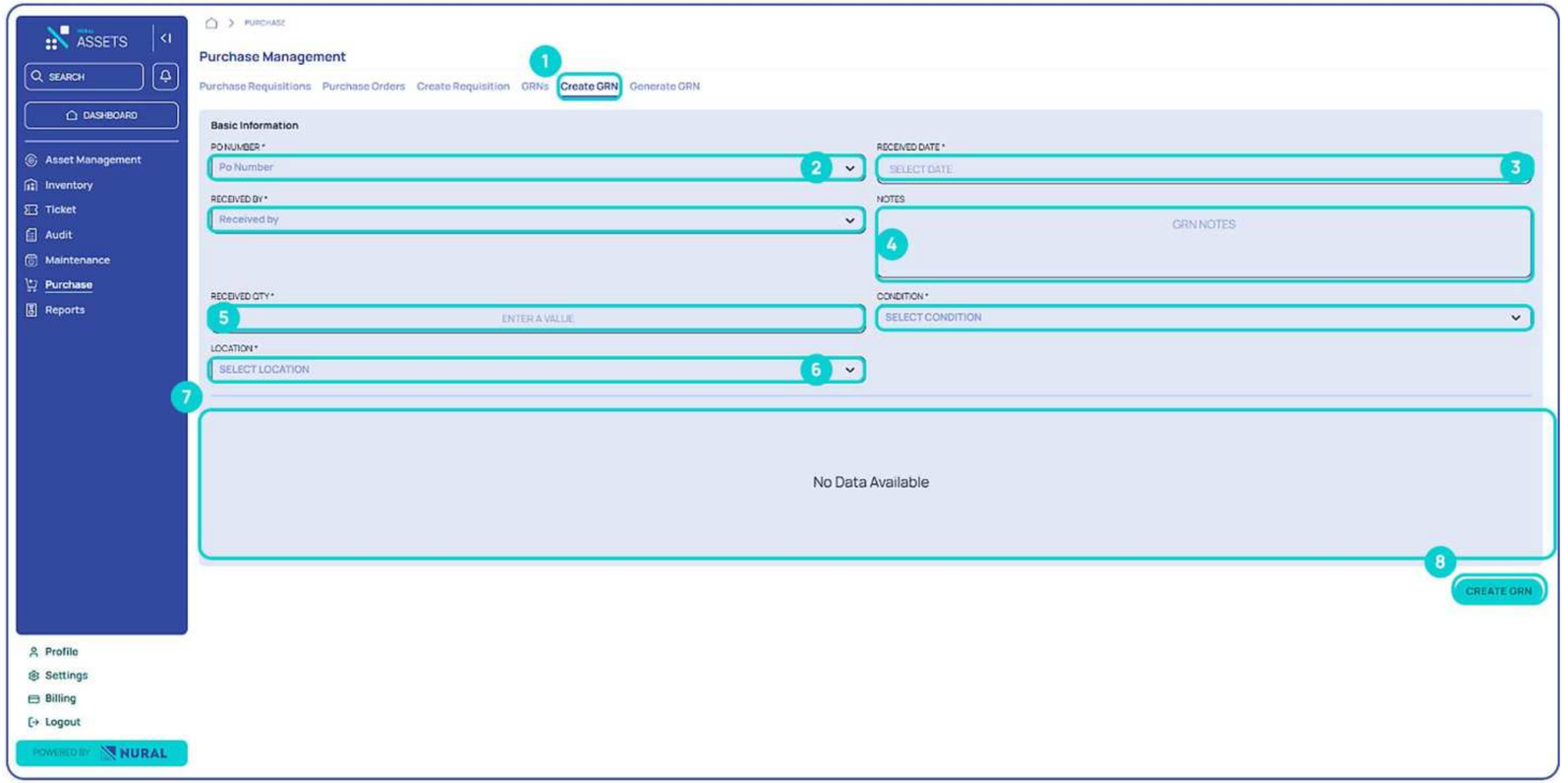


Figure 71 - Create GRN

STEPS

1. Go to: Purchase, then open the Create GRN tab. You can also start a GRN by clicking CREATE GRN against a pending purchase order on the Purchase Orders tab.
2. Under Basic Information, from the PO Number dropdown (mandatory), select the purchase order against which the goods have been received.
3. In Received Date (mandatory), set the date the goods were received, and from the Received By dropdown (mandatory), select the user who received them.
4. In Notes, enter any GRN notes about the delivery.
5. In Received Qty (mandatory), enter the quantity received, and from the Condition dropdown (mandatory), select the condition of the goods.
6. From the Location dropdown (mandatory), select the location where the goods have been stored.
7. The item lines of the selected purchase order are listed below the form; until a purchase order is selected, No Data Available is displayed.
8. Click CREATE GRN to save. The new GRN appears in the Goods Receipt Notes (GRNs) list with the status DRAFT.

GRNs

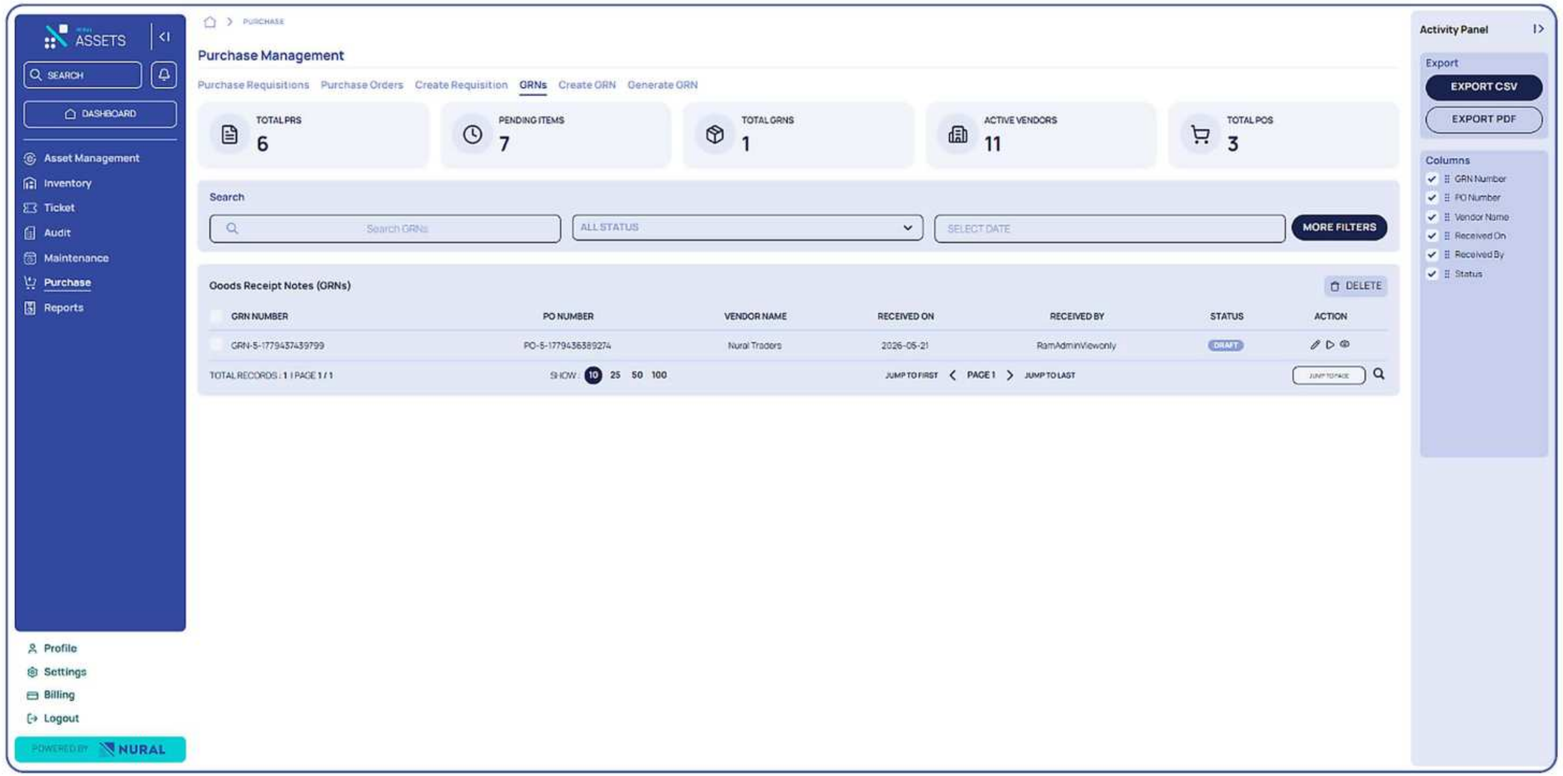


Figure 72 - GRNs

STEPS

1. Go to: Purchase, then open the GRNs tab. The Goods Receipt Notes (GRNs) list shows every GRN with its GRN Number, PO Number, Vendor Name, Received On, Received By, and Status.
2. Use the summary cards at the top to see the count of Total PRs, Pending Items, Total GRNs, Active Vendors, and Total POs.
3. To find a GRN, type in Search GRNs and/or filter by the ALL STATUS dropdown and Select Date, and click MORE FILTERS for additional filter options.
4. Use the icons in the Action column of a row to edit the GRN (pencil icon), process it (play icon), or open its details (eye icon).
5. To delete GRNs, select the checkbox(es) beside the required rows and click DELETE above the list.
6. In the Activity Panel, use the Columns options to show or hide columns (GRN Number, PO Number, Vendor Name, Received On, Received By, Status), and click EXPORT CSV or EXPORT PDF under Export to download the list.
7. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page.

Generate GRN



Figure 73 - Generate GRN

STEPS

1. Go to: Purchase, then open the Generate GRN tab. This screen generates goods receipt notes for purchase orders that are ready to be received.
2. Select the purchase order for which the GRN is to be generated; if no purchase orders are awaiting receipt, No Data Available is displayed.
3. Click BACK to return to the previous screen without generating a GRN.
4. In the Activity Panel, click EXPORT CSV or EXPORT PDF under Export to download the list.

Reports

Thirty reports across assets, inventory, tickets, audits, maintenance, purchasing and depreciation.

Reports

Asset Report

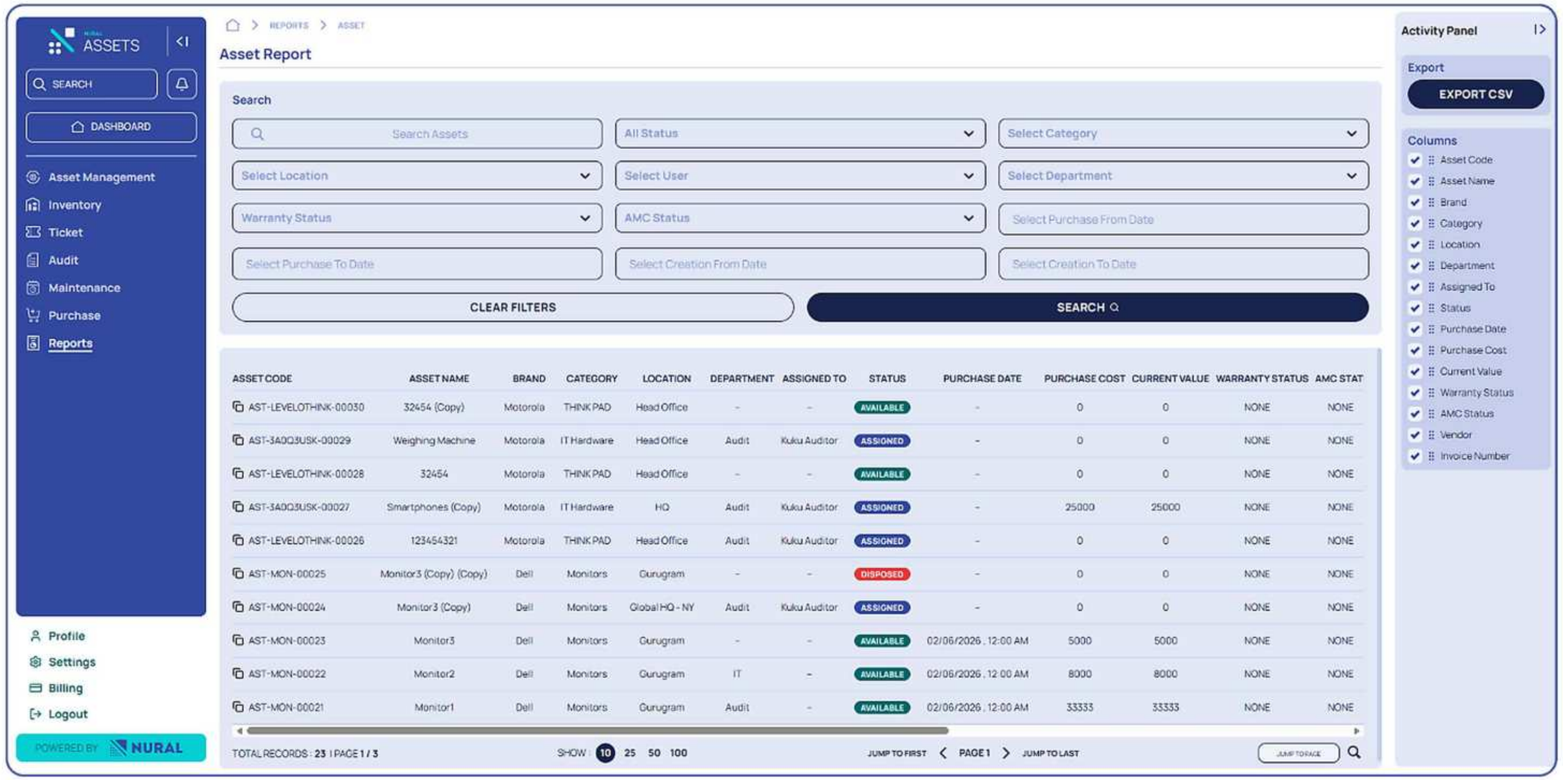


Figure 74 - Asset Report

The Reports module provides consolidated, filterable views of the data held across the application, which can be searched on screen and exported for analysis or audit purposes. Each report offers its own set of search filters, configurable columns, and export options. Reports are available from the main navigation menu under Reports.

STEPS

1. Go to: Reports, then open Asset Report. The report lists every asset with its Asset Code, Asset Name, Brand, Category, Location, Department, Assigned To, Status, Purchase Date, Purchase Cost, Current Value, Warranty Status, and AMC Status.
2. Under Search, type in Search Assets to look for a particular asset by name or code.
3. Narrow the report using the All Status, Select Category, Select Location, Select User, Select Department, Warranty Status, and AMC Status dropdowns.
4. Use Select Purchase From Date and Select Purchase To Date to restrict the report to a purchase date range, and Select Creation From Date and Select Creation To Date to restrict it to a creation date range.

Asset Report

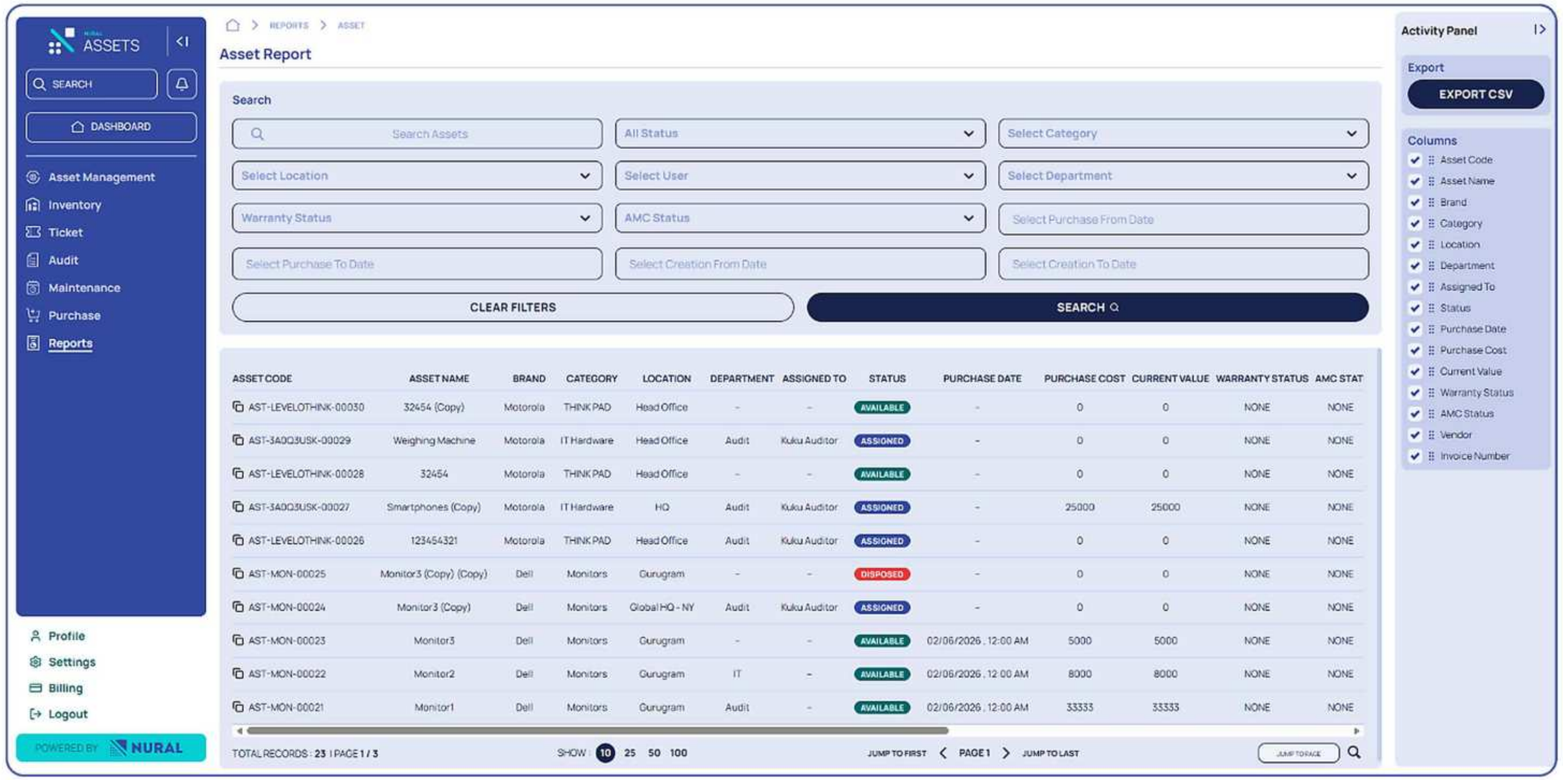


Figure 74 - Asset Report

STEPS, CONTINUED

5. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

6. Click the copy icon beside an Asset Code to copy the code, and use the horizontal scroll bar below the table to view the remaining columns.

7. In the Activity Panel, use the Columns options to show or hide columns (Asset Code, Asset Name, Brand, Category, Location, Department, Assigned To, Status, Purchase Date, Purchase Cost, Current Value, Warranty Status, AMC Status, Vendor, Invoice Number), and click EXPORT CSV under Export to download the report.

8. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Asset History Report

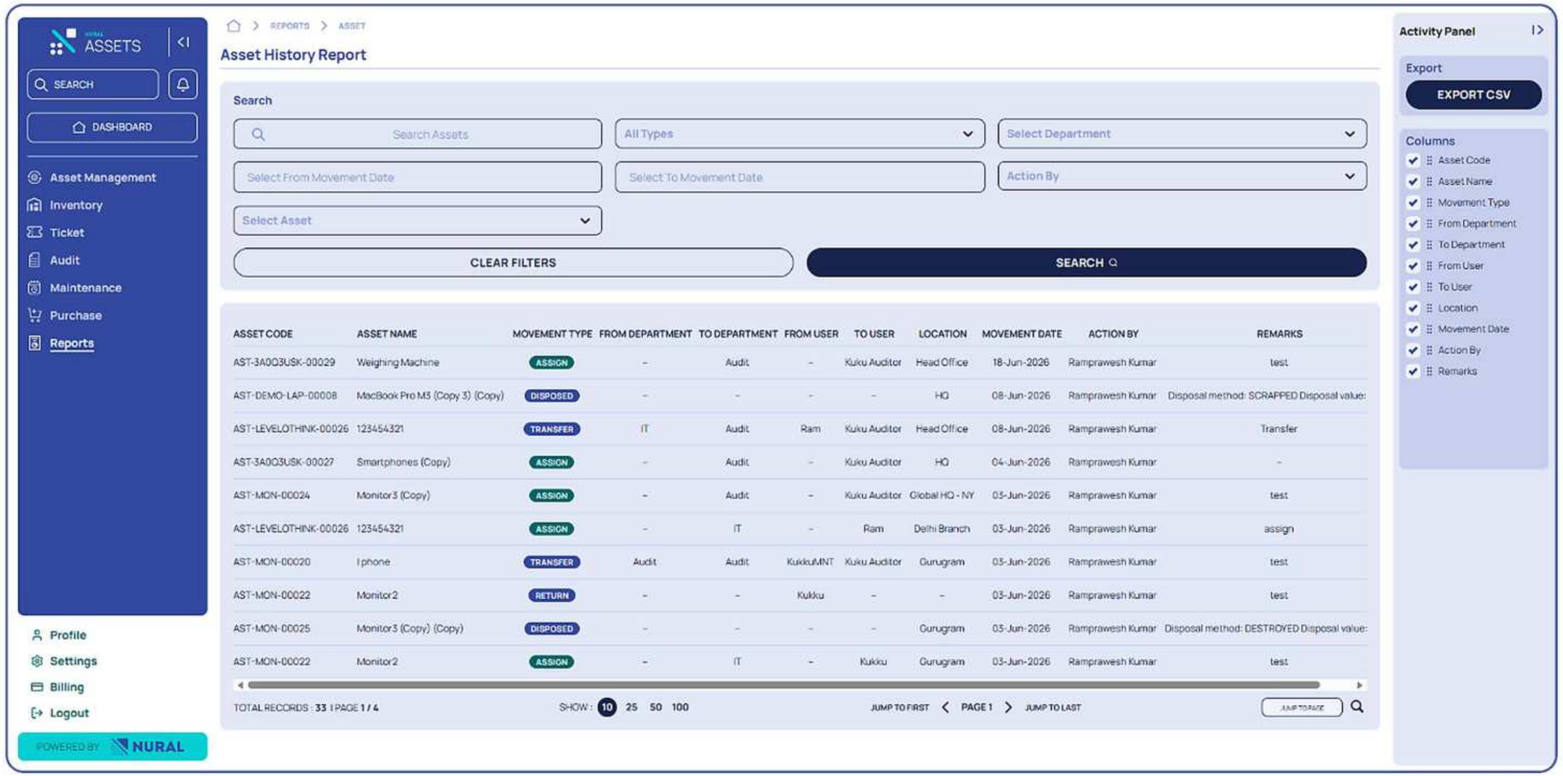


Figure 75 - Asset History Report

STEPS

1. Go to: Reports, then open Asset History Report. The report lists every asset movement with its Asset Code, Asset Name, Movement Type, From Department, To Department, From User, To User, Location, Movement Date, Action By, and Remarks.
2. The Movement Type of each record shows the action performed - for example, ASSIGN, TRANSFER, RETURN, or DISPOSED. For disposed assets, the Remarks column records the disposal method and disposal value.
3. Under Search, type in Search Assets to look for a particular asset by name or code.
4. Narrow the report using the All Types, Select Department, Action By, and Select Asset dropdowns.
5. Use Select From Movement Date and Select To Movement Date to restrict the report to a movement date range.

Asset History Report

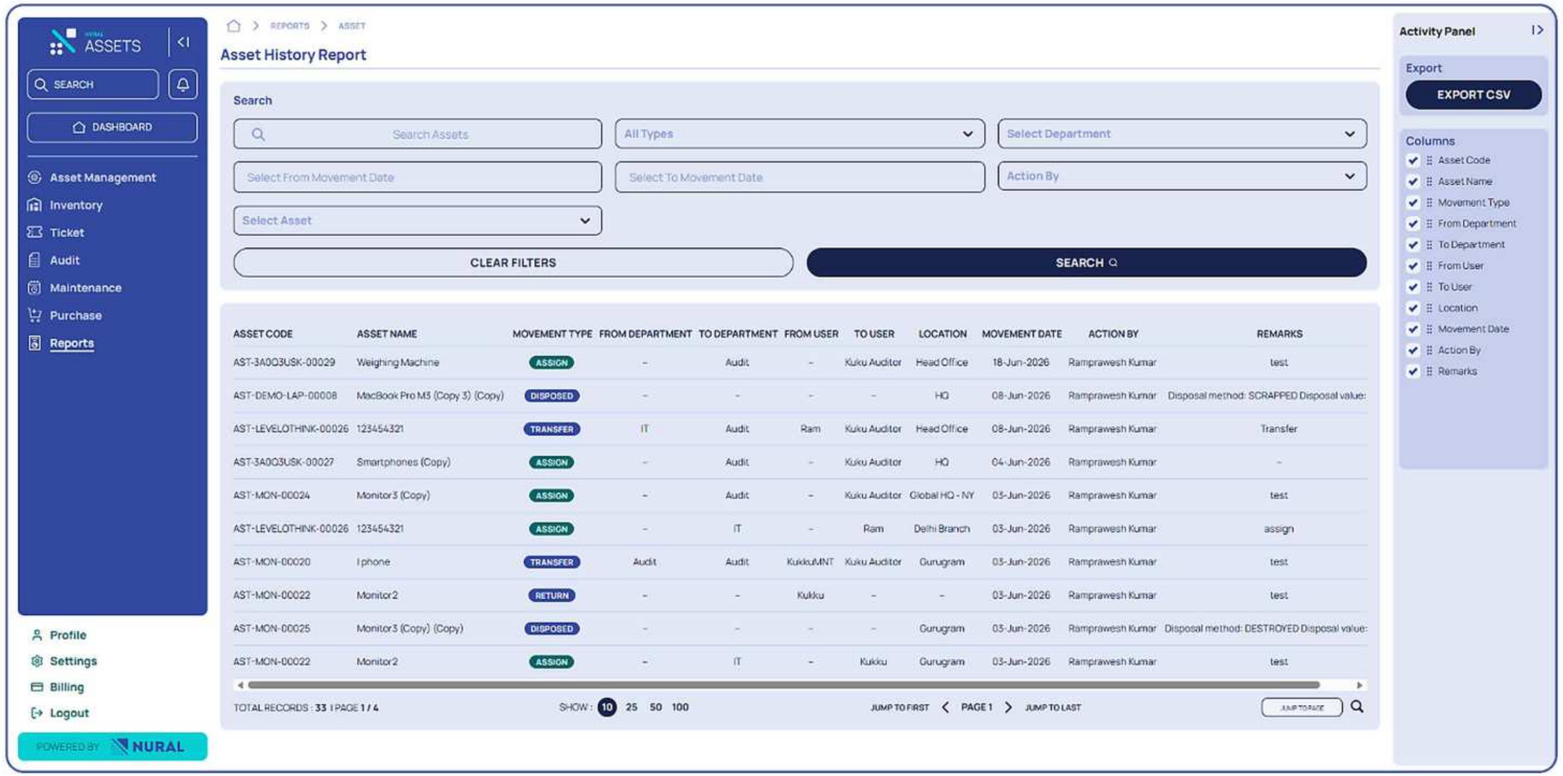


Figure 75 - Asset History Report

STEPS, CONTINUED

6. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

7. Use the horizontal scroll bar below the table to view the remaining columns.

8. In the Activity Panel, use the Columns options to show or hide columns (Asset Code, Asset Name, Movement Type, From Department, To Department, From User, To User, Location, Movement Date, Action By, Remarks), and click EXPORT CSV under Export to download the report.

9. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Asset Ticket Report

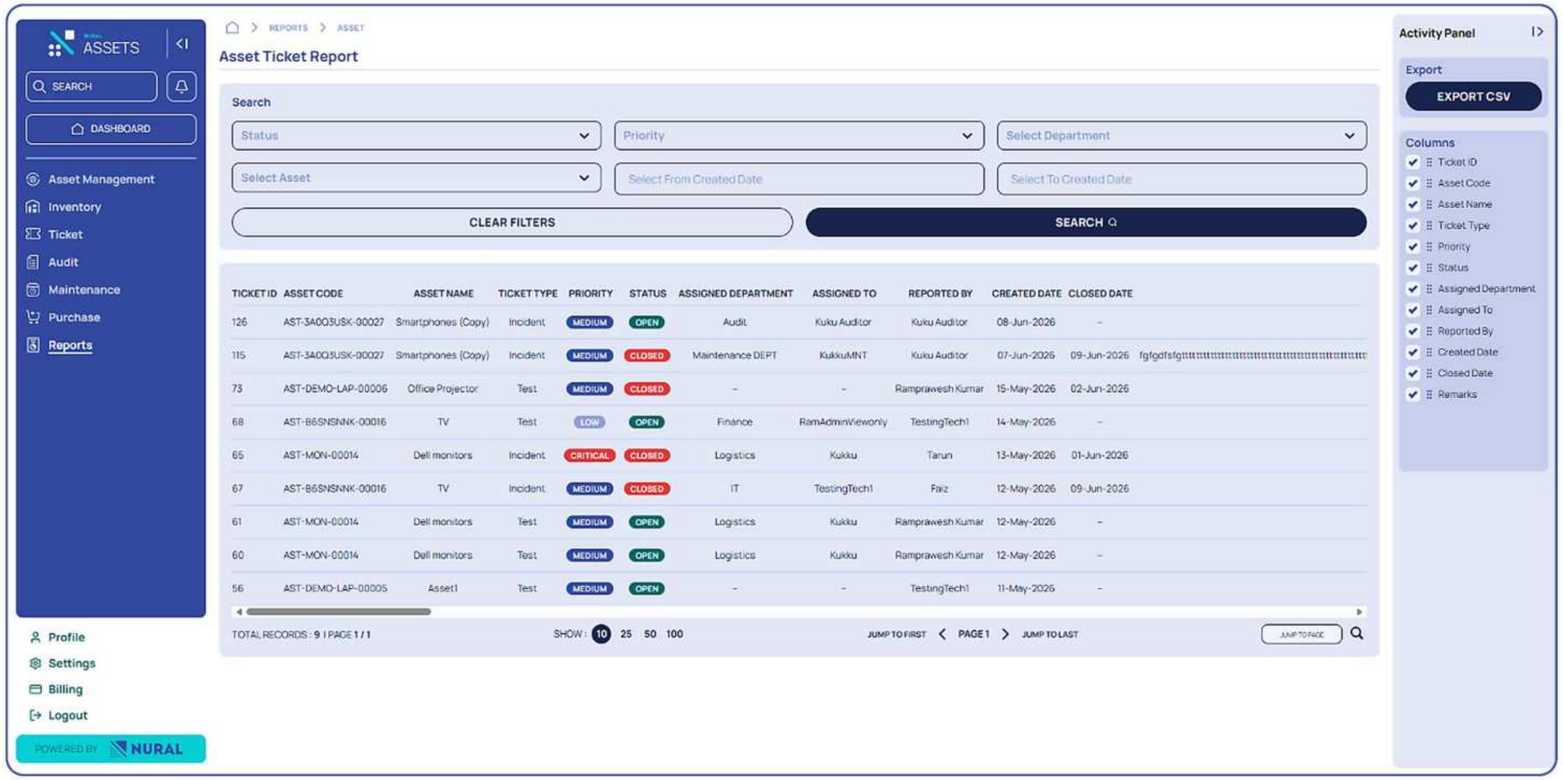


Figure 76 - Asset Ticket Report

STEPS

1. Go to: Reports, then open Asset Ticket Report. The report lists every ticket raised against an asset with its Ticket ID, Asset Code, Asset Name, Ticket Type, Priority, Status, Assigned Department, Assigned To, Reported By, Created Date, Closed Date, and Remarks.
2. The Priority column shows the urgency of each ticket - for example, LOW, MEDIUM, or CRITICAL - and the Status column shows whether it is OPEN or CLOSED. The Closed Date is blank for tickets that are still open.
3. Under Search, narrow the report using the Status, Priority, Select Department, and Select Asset dropdowns.
4. Use Select From Created Date and Select To Created Date to restrict the report to a ticket creation date range.
5. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.
6. Use the horizontal scroll bar below the table to view the remaining columns.
7. In the Activity Panel, use the Columns options to show or hide columns (Ticket ID, Asset Code, Asset Name, Ticket Type, Priority, Status, Assigned Department, Assigned To, Reported By, Created Date, Closed Date, Remarks), and click EXPORT CSV under Export to download the report.
8. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Current Stock Balance

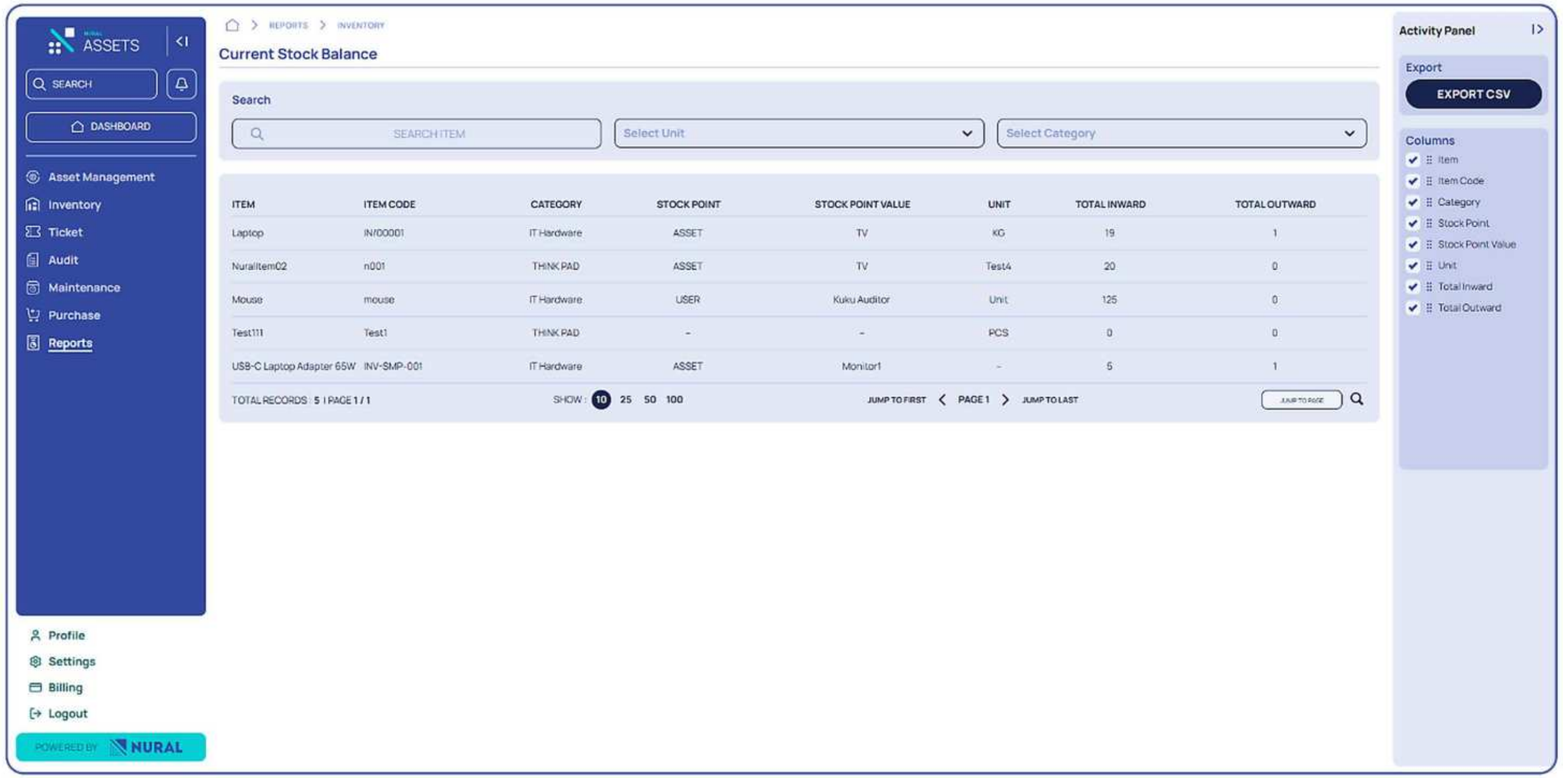


Figure 77 - Current Stock Balance

STEPS

1. Go to: Reports, then open Current Stock Balance under Inventory. The report lists the present stock position of every inventory item with its Item, Item Code, Category, Stock Point, Stock Point Value, Unit, Total Inward, and Total Outward.
2. The Stock Point column shows where the stock is held - for example, ASSET or USER - and the Stock Point Value names the specific asset or user. Total Inward and Total Outward show the quantities received into and issued out of stock.
3. Under Search, type in SEARCH ITEM to look for a particular item by name or code.
4. Narrow the report using the Select Unit and Select Category dropdowns; the list refreshes as the filters are applied.
5. In the Activity Panel, use the Columns options to show or hide columns (Item, Item Code, Category, Stock Point, Stock Point Value, Unit, Total Inward, Total Outward), and click EXPORT CSV under Export to download the report.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Item Consumption Report

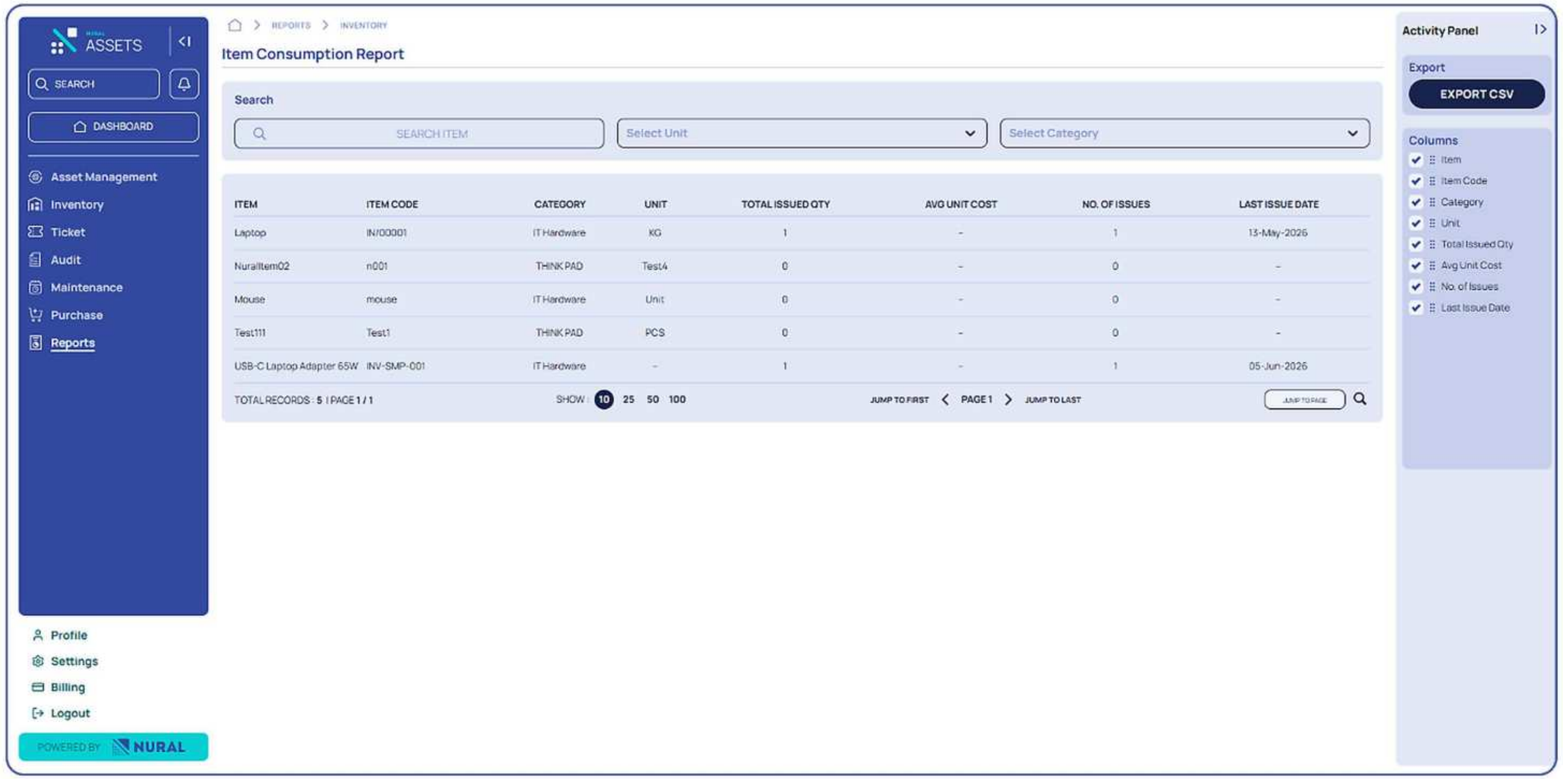


Figure 78 - Item Consumption Report

STEPS

1. Go to: Reports, then open Item Consumption Report under Inventory. The report shows how much of each inventory item has been consumed, with its Item, Item Code, Category, Unit, Total Issued Qty, Avg Unit Cost, No. of Issues, and Last Issue Date.
2. Total Issued Qty is the total quantity issued out of stock for the item, No. of Issues is the number of separate issue transactions, and Last Issue Date is the date of the most recent issue. A dash is shown where no value is available.
3. Under Search, type in SEARCH ITEM to look for a particular item by name or code.
4. Narrow the report using the Select Unit and Select Category dropdowns; the list refreshes as the filters are applied.
5. In the Activity Panel, use the Columns options to show or hide columns (Item, Item Code, Category, Unit, Total Issued Qty, Avg Unit Cost, No. of Issues, Last Issue Date), and click EXPORT CSV under Export to download the report.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Inward Outward Summary

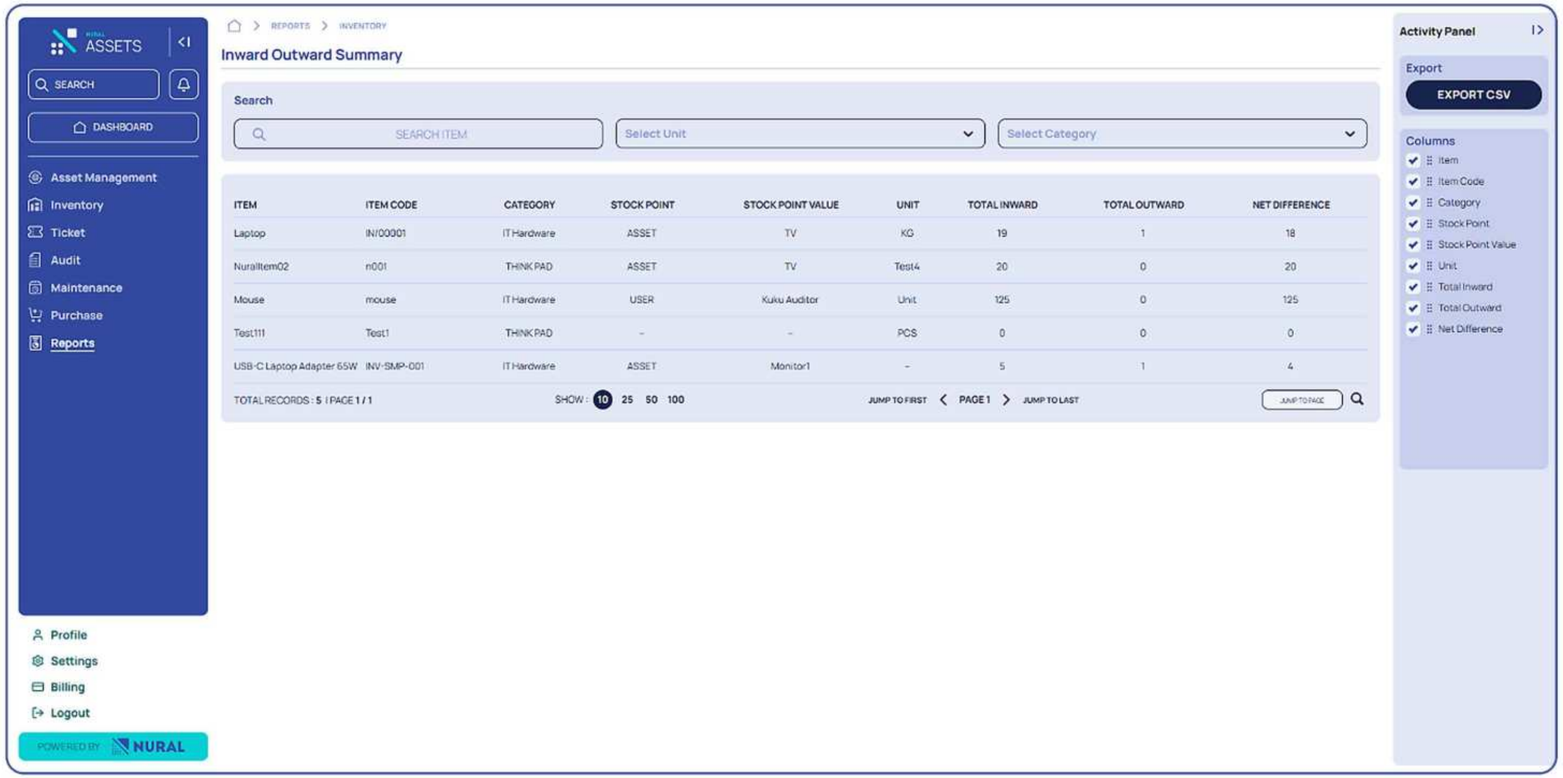


Figure 79 - Inward Outward Summary

STEPS

1. Go to: Reports, then open Inward Outward Summary under Inventory. The report summarises stock movement for every inventory item with its Item, Item Code, Category, Stock Point, Stock Point Value, Unit, Total Inward, Total Outward, and Net Difference.
2. Total Inward is the quantity received into stock, Total Outward is the quantity issued out, and Net Difference is the resulting balance for that item at the given stock point.
3. The Stock Point column shows where the stock is held - for example, ASSET or USER - and the Stock Point Value names the specific asset or user. A dash is shown where no value is available.
4. Under Search, type in SEARCH ITEM to look for a particular item by name or code.
5. Narrow the report using the Select Unit and Select Category dropdowns; the list refreshes as the filters are applied.
6. In the Activity Panel, use the Columns options to show or hide columns (Item, Item Code, Category, Stock Point, Stock Point Value, Unit, Total Inward, Total Outward, Net Difference), and click EXPORT CSV under Export to download the report.
7. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Reorder Alert Report

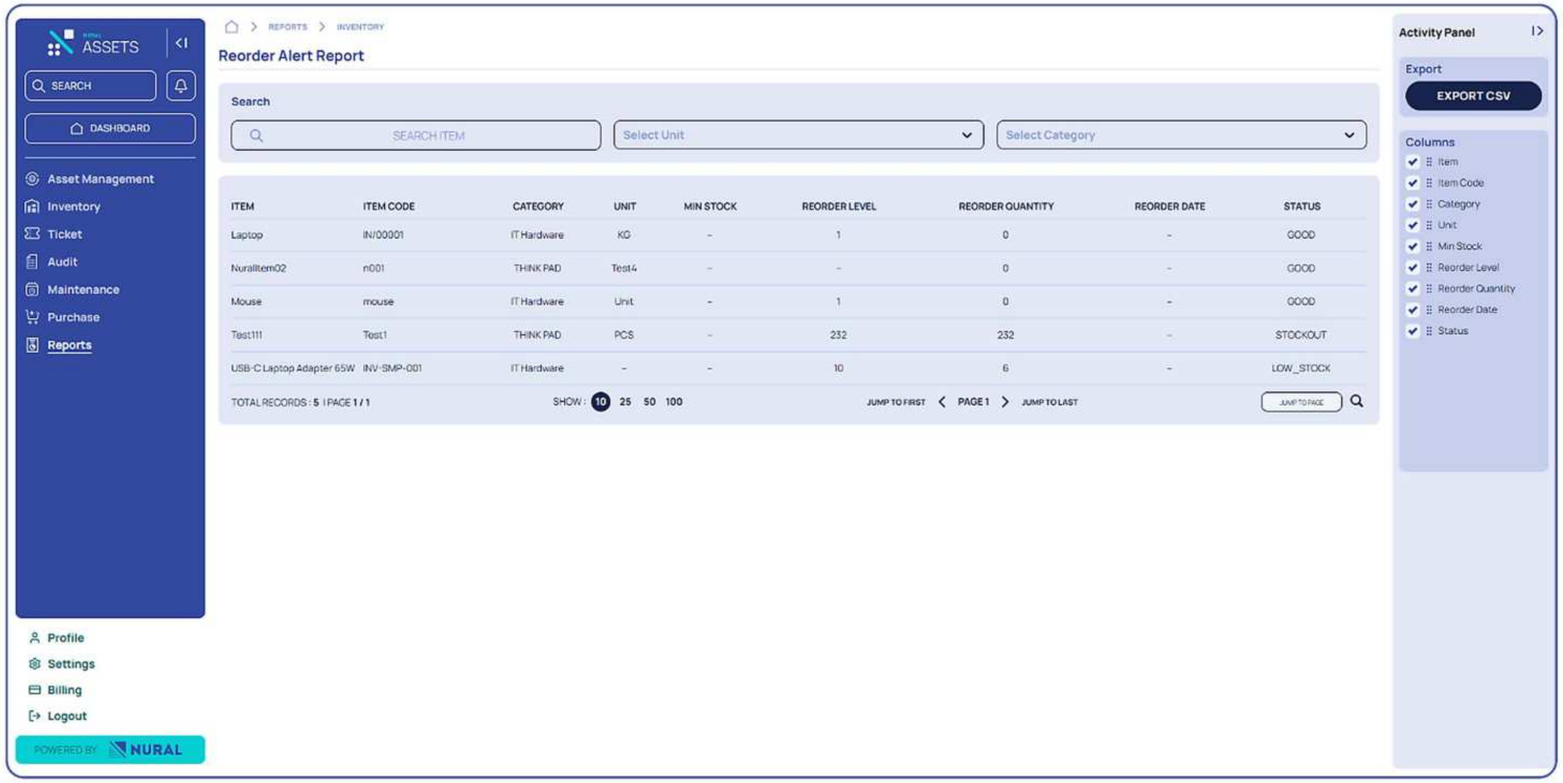


Figure 80 - Reorder Alert Report

STEPS

1. Go to: Reports, then open Reorder Alert Report under Inventory. The report highlights items that need replenishment and lists each item with its Item, Item Code, Category, Unit, Min Stock, Reorder Level, Reorder Quantity, Reorder Date, and Status.

2. Min Stock is the minimum stock to be maintained, Reorder Level is the balance at which a fresh order should be raised, Reorder Quantity is the quantity to order, and Reorder Date is the date on which the reorder is due. A dash is shown where no value has been set.

3. The Status column shows the replenishment position of each item - GOOD where stock is adequate, LOW_STOCK where it has reached the reorder level, and STOCKOUT where no stock remains.

4. Under Search, type in SEARCH ITEM to look for a particular item by name or code.

5. Narrow the report using the Select Unit and Select Category dropdowns; the list refreshes as the filters are applied.

6. In the Activity Panel, use the Columns options to show or hide columns (Item, Item Code, Category, Unit, Min Stock, Reorder Level, Reorder Quantity, Reorder Date, Status), and click EXPORT CSV under Export to download the report.

7. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Inventory Master Report

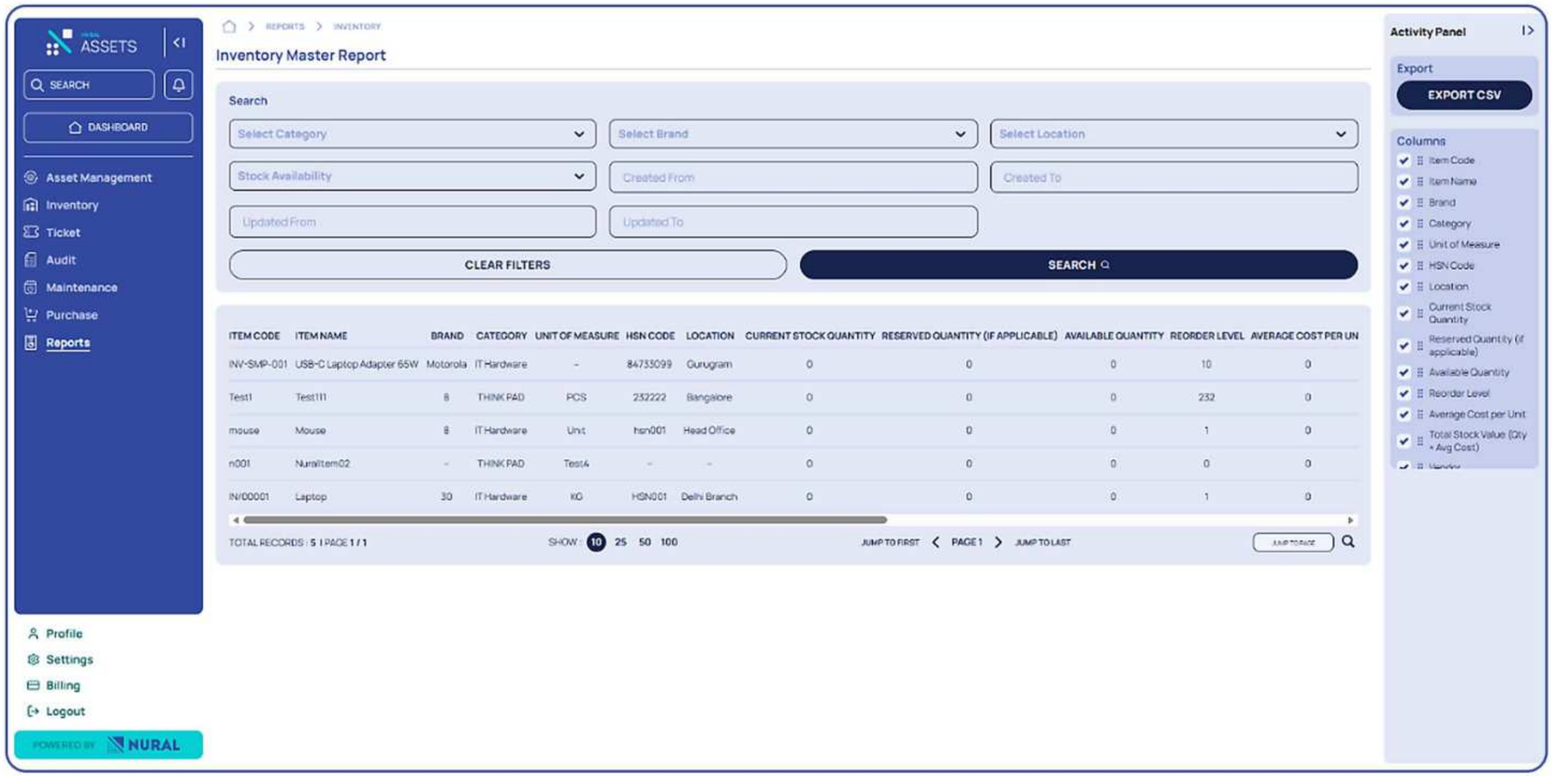


Figure 81 - Inventory Master Report

STEPS

1. Go to: Reports, then open Inventory Master Report under Inventory. The report gives the complete master and stock position of every inventory item, with its Item Code, Item Name, Brand, Category, Unit of Measure, HSN Code, Location, Current Stock Quantity, Reserved Quantity (if applicable), Available Quantity, Reorder Level, and Average Cost per Unit.
2. Additional columns are available in the Activity Panel - Total Stock Value (Qty × Avg Cost) and Vendor. A dash is shown where no value has been set.
3. Reserved Quantity is the stock already committed against a request, and Available Quantity is the balance that remains free for issue.
4. Under Search, narrow the report using the Select Category, Select Brand, Select Location, and Stock Availability dropdowns.
5. Use Created From and Created To to restrict the report to an item creation date range, and Updated From and Updated To to restrict it to a last-updated date range.

Inventory Master Report

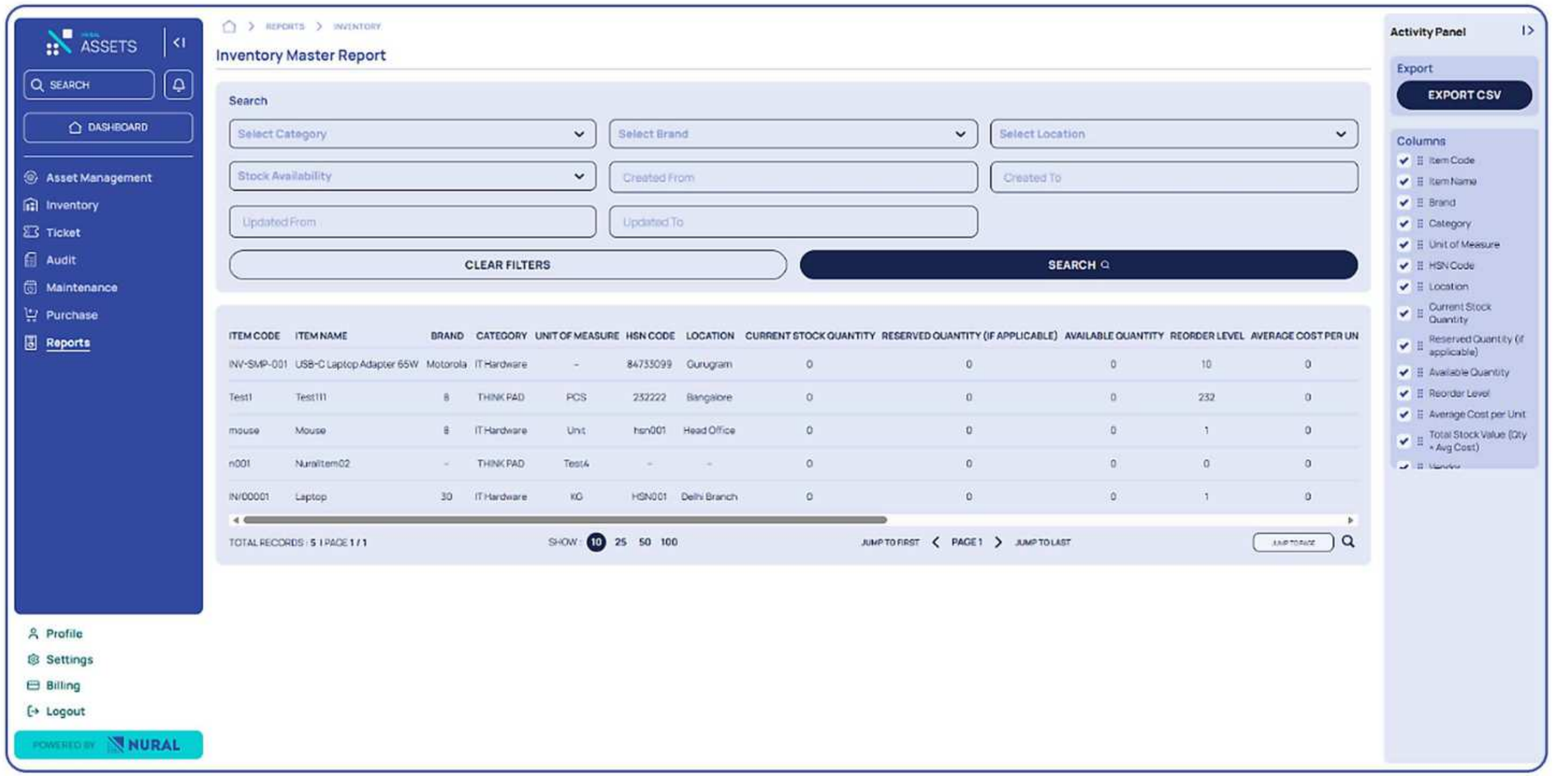


Figure 81 - Inventory Master Report

STEPS, CONTINUED

6. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

7. Use the horizontal scroll bar below the table to view the remaining columns.

8. In the Activity Panel, use the Columns options to show or hide columns (Item Code, Item Name, Brand, Category, Unit of Measure, HSN Code, Location, Current Stock Quantity, Reserved Quantity, Available Quantity, Reorder Level, Average Cost per Unit, Total Stock Value, Vendor), and click EXPORT CSV under Export to download the report.

9. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Inventory Movement & Transaction Report

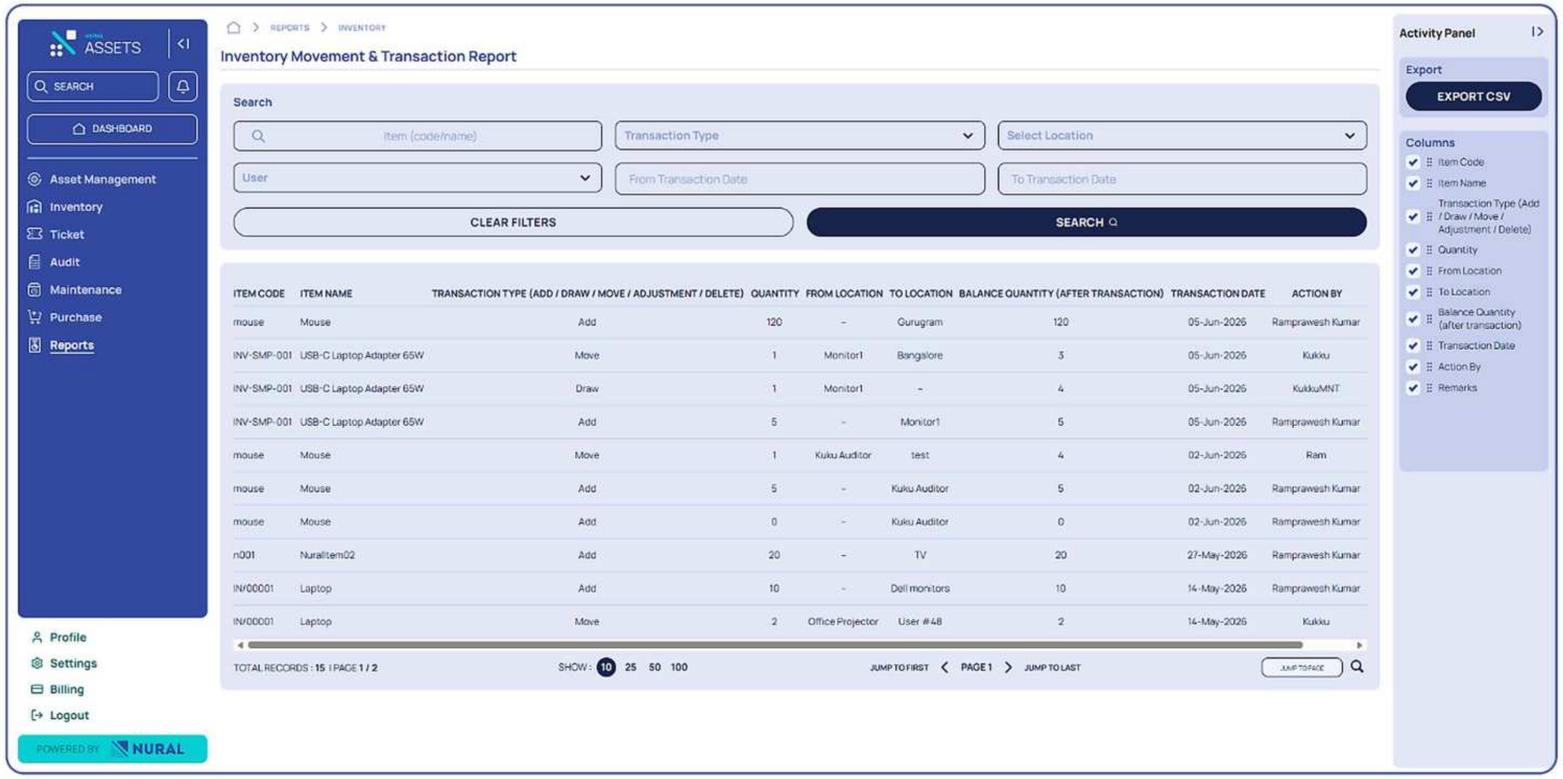


Figure 82 - Inventory Movement & Transaction Report

STEPS

1. Go to: Reports, then open Inventory Movement & Transaction Report under Inventory. The report lists every stock transaction with its Item Code, Item Name, Transaction Type (Add / Draw / Move / Adjustment / Delete), Quantity, From Location, To Location, Balance Quantity (after transaction), Transaction Date, and Action By.
2. The Transaction Type shows what was done to the stock - Add for stock received, Draw for stock issued, Move for a transfer between locations, Adjustment for a correction, and Delete for a removed entry. From Location and To Location show a dash where they do not apply.
3. Balance Quantity (after transaction) is the stock balance that remained after the transaction, and Action By names the user who performed it. A Remarks column is also available in the Activity Panel.
4. Under Search, type in Item (code/name) to look for a particular item.
5. Narrow the report using the Transaction Type, Select Location, and User dropdowns.

Inventory Movement & Transaction Report

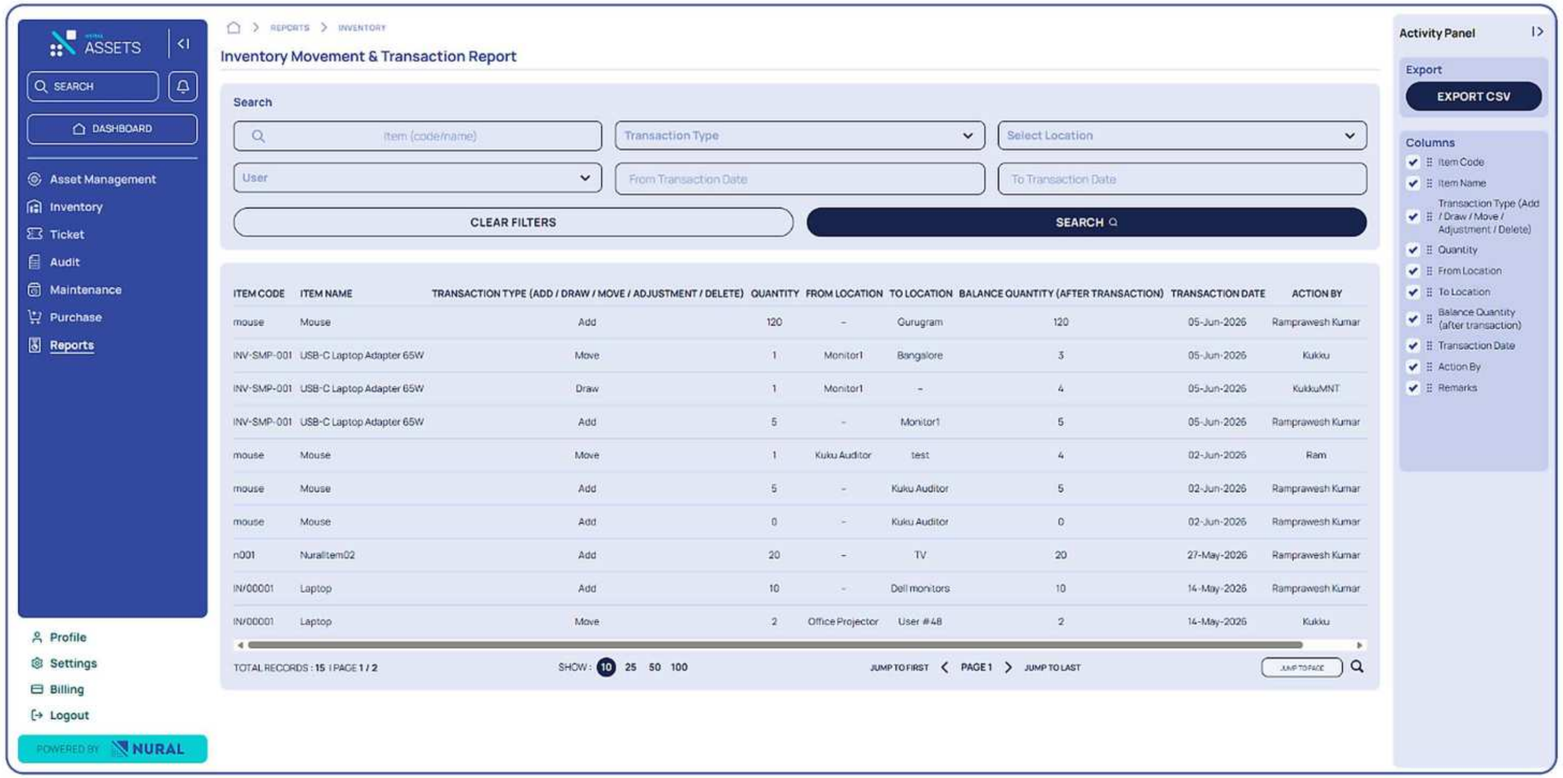


Figure 82 - Inventory Movement & Transaction Report

STEPS, CONTINUED

6. Use From Transaction Date and To Transaction Date to restrict the report to a transaction date range.

7. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

8. Use the horizontal scroll bar below the table to view the remaining columns.

9. In the Activity Panel, use the Columns options to show or hide columns (Item Code, Item Name, Transaction Type, Quantity, From Location, To Location, Balance Quantity, Transaction Date, Action By, Remarks), and click EXPORT CSV under Export to download the report.

10. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Open vs Closed

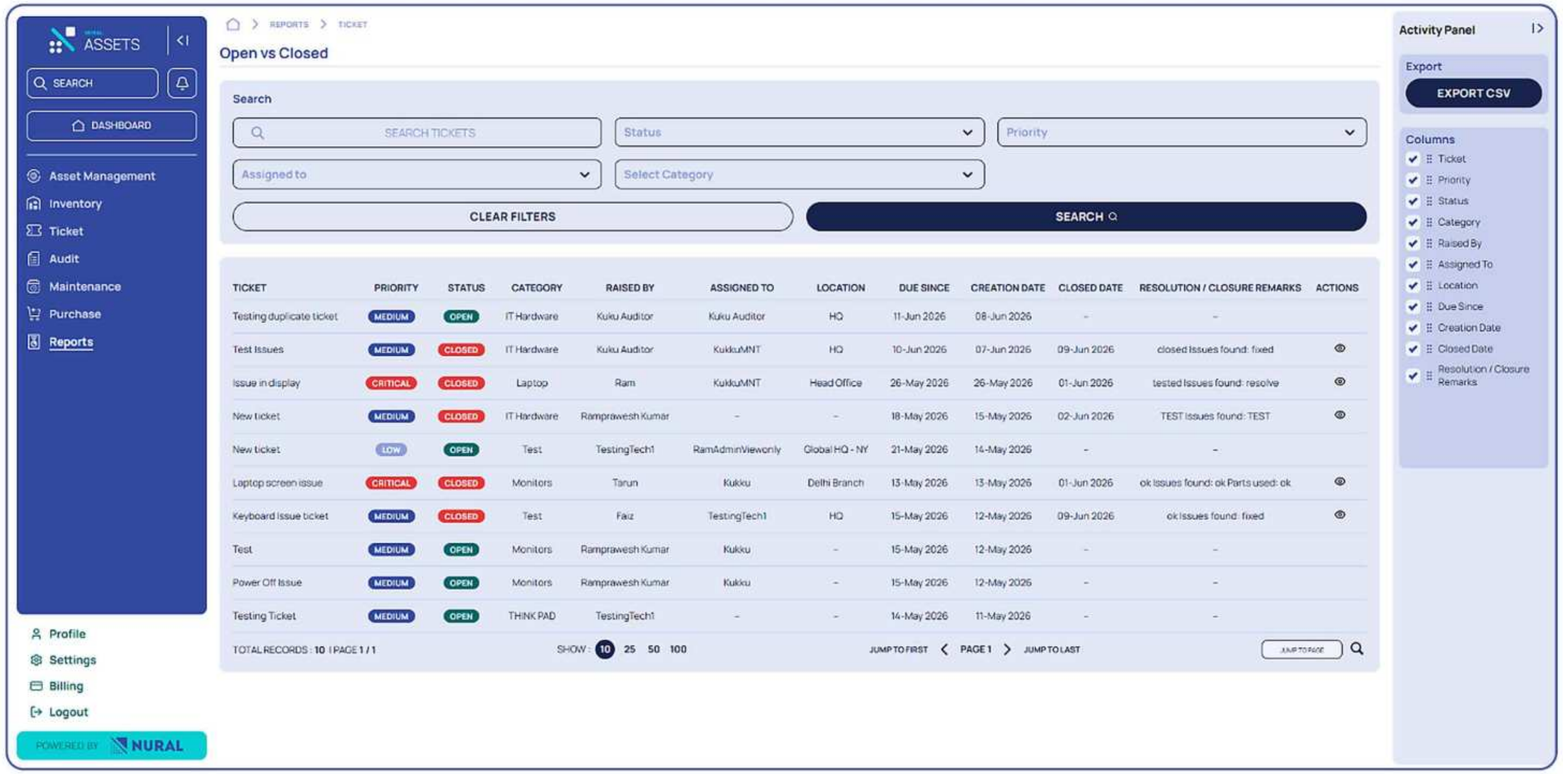


Figure 83 - Open vs Closed

STEPS

1. Go to: Reports, then open Open vs Closed under Ticket. The report compares open and closed tickets and lists each ticket with its Ticket, Priority, Status, Category, Raised By, Assigned To, Location, Due Since, Creation Date, Closed Date, and Resolution / Closure Remarks.
2. The Status column shows whether a ticket is OPEN or CLOSED, and the Priority column shows its urgency - for example, LOW, MEDIUM, or CRITICAL.
3. Due Since is the date from which the ticket has been pending. For open tickets, the Closed Date and Resolution / Closure Remarks columns show a dash; for closed tickets, the remarks record how the issue was resolved.
4. Under Search, type in SEARCH TICKETS to look for a particular ticket by title.
5. Narrow the report using the Status, Priority, Assigned to, and Select Category dropdowns.

Open vs Closed

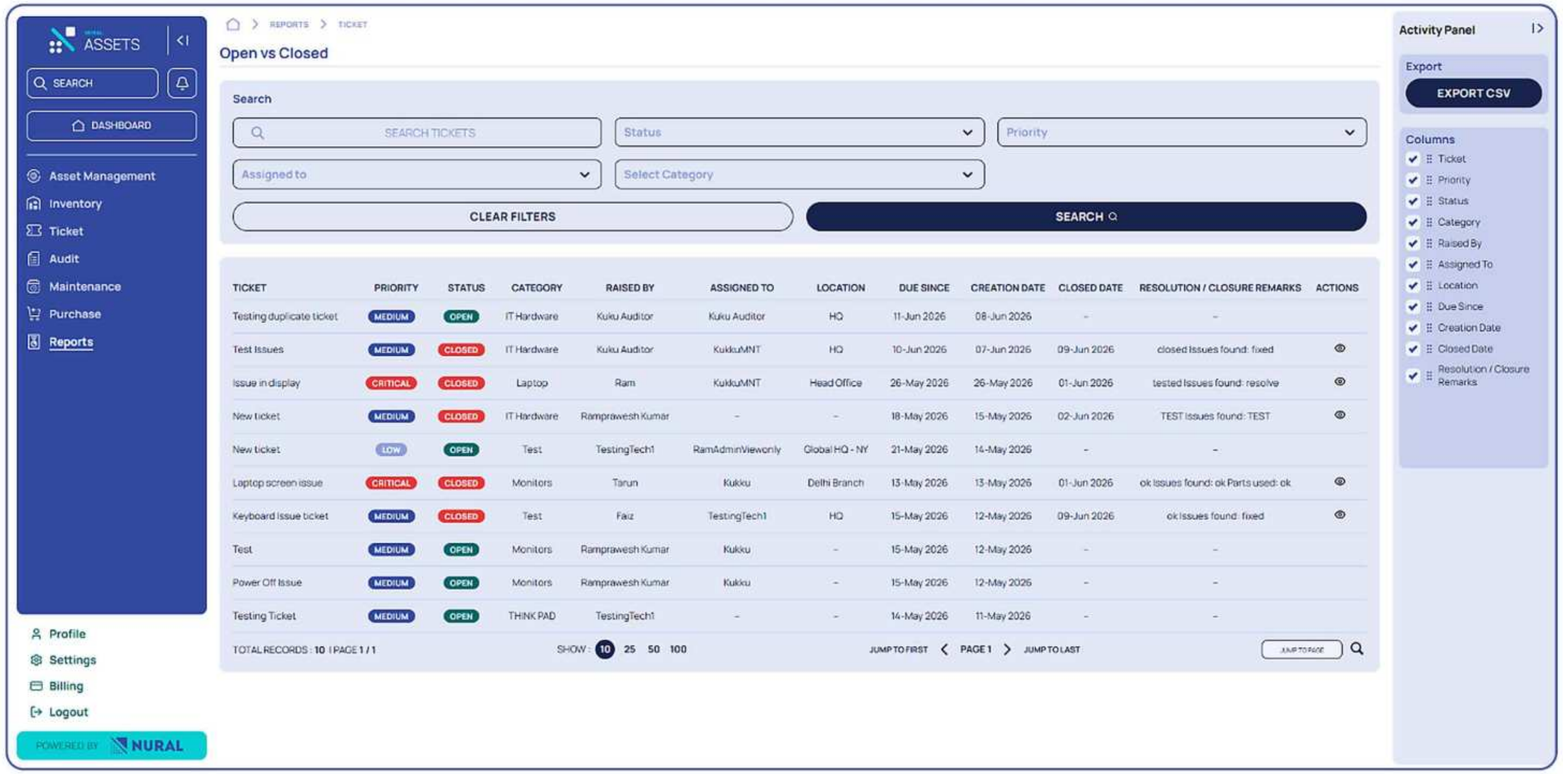


Figure 83 - Open vs Closed

STEPS, CONTINUED

6. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.
7. For a closed ticket, click the view (eye) icon in the Actions column to open its resolution details.
8. In the Activity Panel, use the Columns options to show or hide columns (Ticket, Priority, Status, Category, Raised By, Assigned To, Location, Due Since, Creation Date, Closed Date, Resolution / Closure Remarks), and click EXPORT CSV under Export to download the report.
9. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

SLA Compliance Report

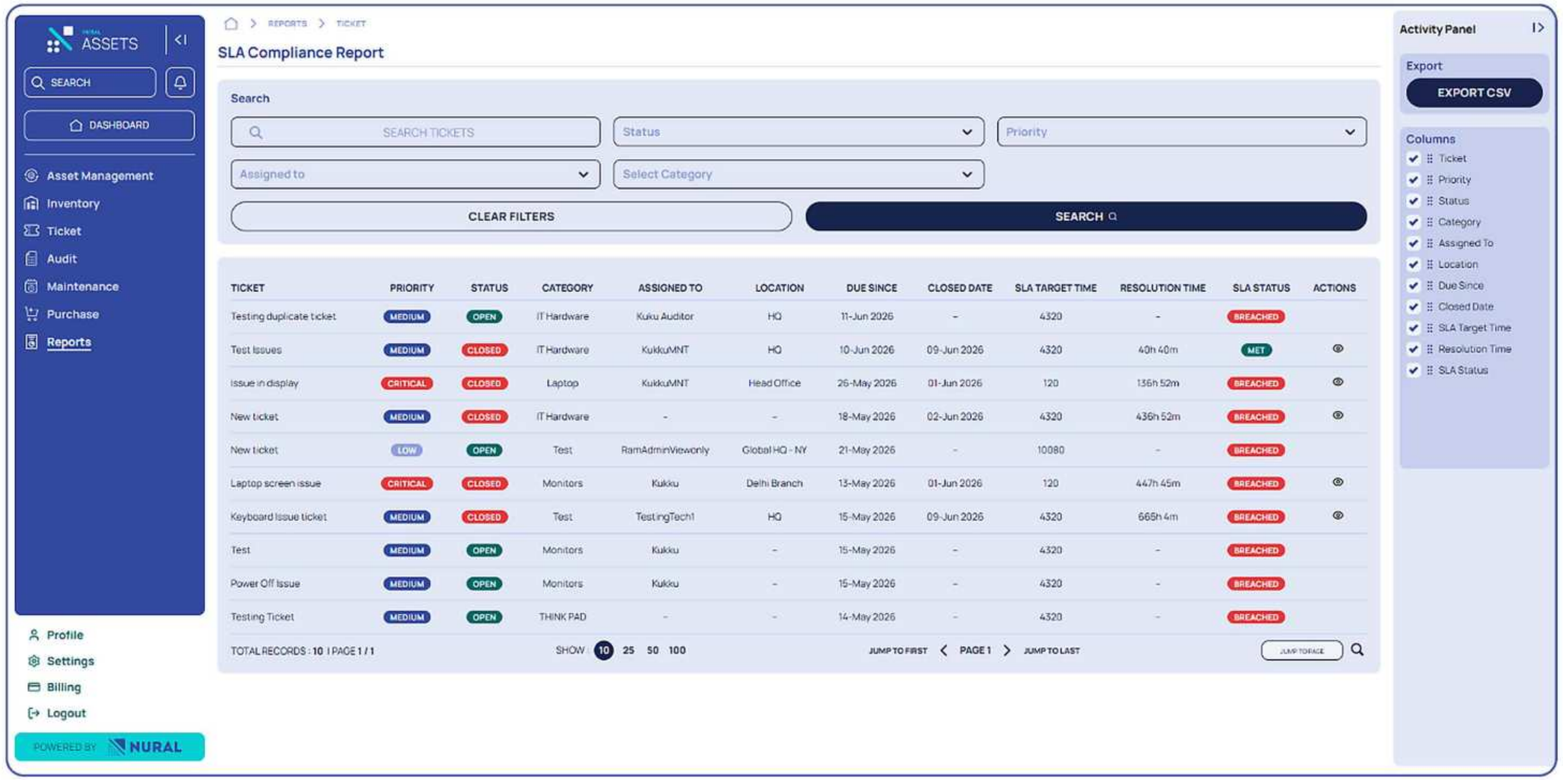


Figure 84 - SLA Compliance Report

STEPS

1. Go to: Reports, then open SLA Compliance Report under Ticket. The report measures each ticket against its service level agreement and lists it with its Ticket, Priority, Status, Category, Assigned To, Location, Due Since, Closed Date, SLA Target Time, Resolution Time, and SLA Status.
2. SLA Target Time is the resolution time allowed for the ticket in minutes, and Resolution Time is the time actually taken, shown in hours and minutes - for example, 40h 40m.
3. The SLA Status column shows MET where the ticket was resolved within its target time and BREACHED where the target was exceeded or has already passed. Open tickets show a dash in the Closed Date and Resolution Time columns.
4. Under Search, type in SEARCH TICKETS to look for a particular ticket by title.
5. Narrow the report using the Status, Priority, Assigned to, and Select Category dropdowns.

SLA Compliance Report

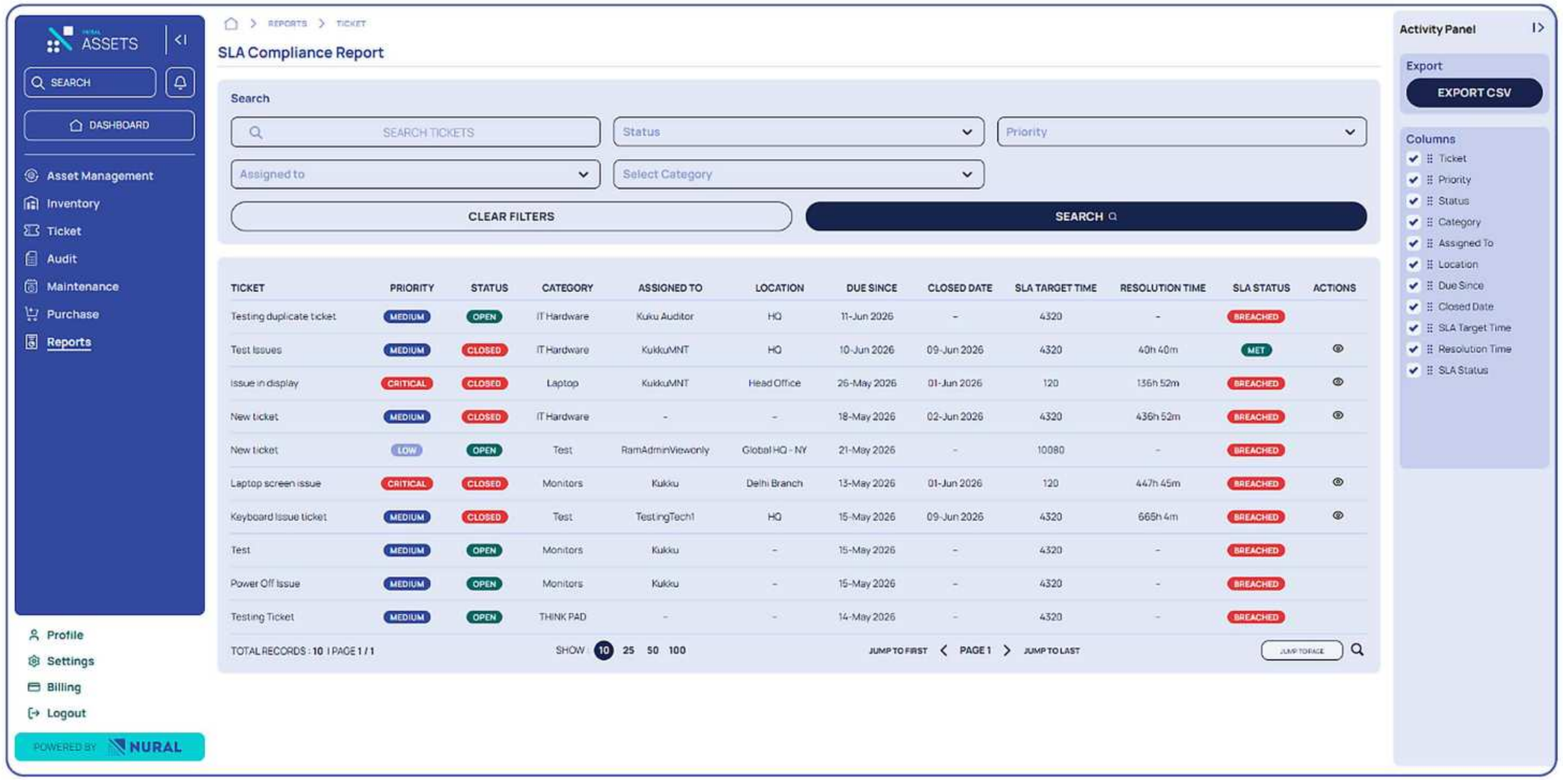


Figure 84 - SLA Compliance Report

STEPS, CONTINUED

6. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

7. For a closed ticket, click the view (eye) icon in the Actions column to open its resolution details.

8. In the Activity Panel, use the Columns options to show or hide columns (Ticket, Priority, Status, Category, Assigned To, Location, Due Since, Closed Date, SLA Target Time, Resolution Time, SLA Status), and click EXPORT CSV under Export to download the report.

9. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Ticket Category/Type Summary



Figure 85 - Ticket Category/Type Summary

STEPS

1. Go to: Reports, then open Ticket Category/Type Summary under Ticket. The report groups tickets by category and shows one row per category with its Category, Total Tickets, Open Ticket, Closed Ticket, SLA Breached, and Avg Resolution Time.

2. Total Tickets is the number of tickets raised for the category, split into Open Ticket and Closed Ticket, while SLA Breached is the number of those tickets that exceeded their SLA target time.

3. Avg Resolution Time is the average time taken to close the tickets in that category, shown in hours and minutes - for example, 238h 46m. A dash is shown where no ticket has been closed yet.

4. Under Search, type in SEARCH CATEGORIES to look for a particular category.

5. In the Activity Panel, use the Columns options to show or hide columns (Category, Total Tickets, Open Ticket, Closed Ticket, SLA Breached, Avg Resolution Time), and click EXPORT CSV under Export to download the report.

6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

User/Department-wise Ticket Status

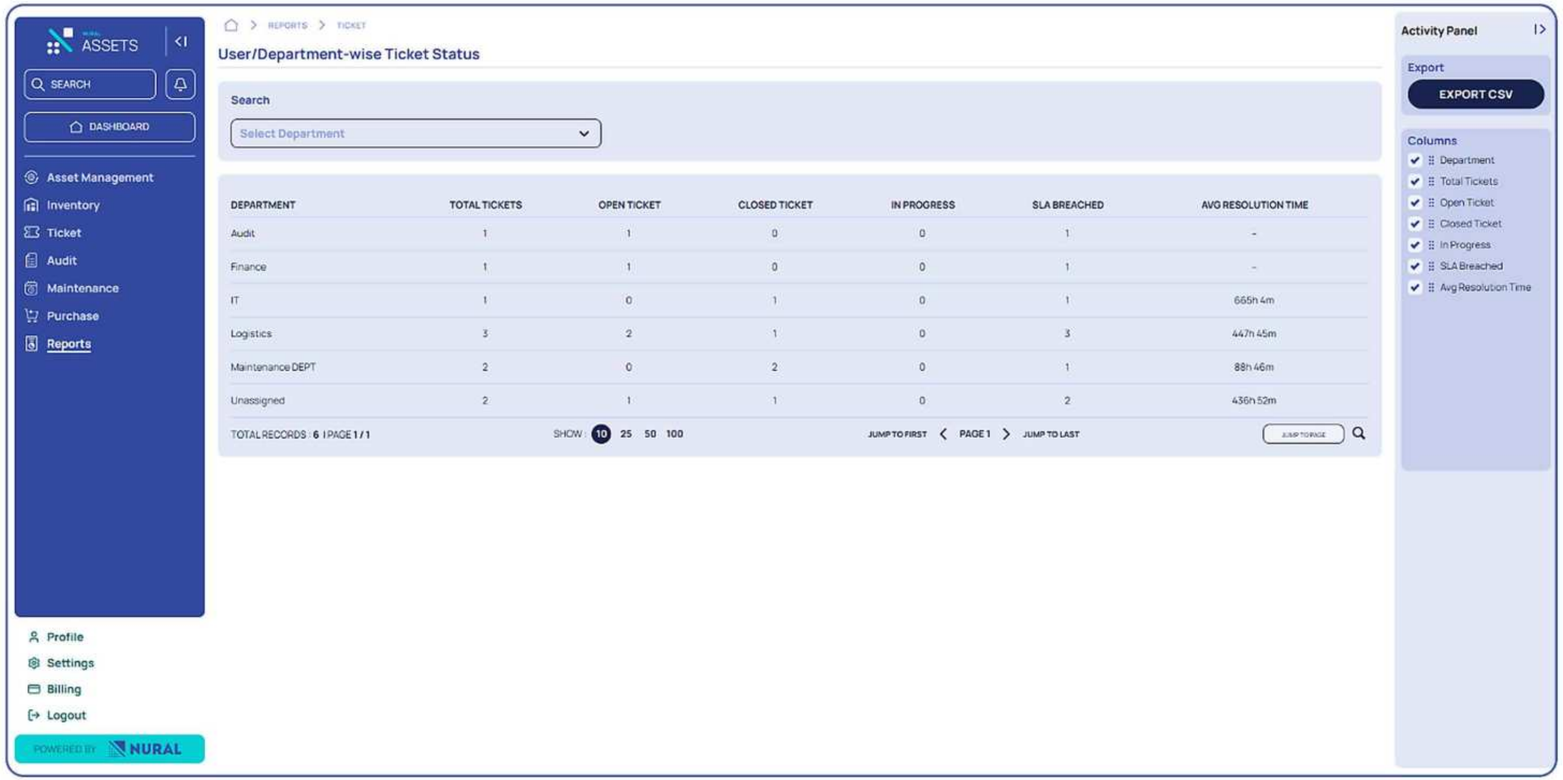


Figure 86 - User/Department-wise Ticket Status

STEPS

1. Go to: Reports, then open User/Department-wise Ticket Status under Ticket. The report groups tickets by department and shows one row per department with its Department, Total Tickets, Open Ticket, Closed Ticket, In Progress, SLA Breached, and Avg Resolution Time.
2. Total Tickets is the number of tickets for the department, split into Open Ticket, In Progress, and Closed Ticket, while SLA Breached is the number of those tickets that exceeded their SLA target time.
3. Avg Resolution Time is the average time taken to close the department's tickets, shown in hours and minutes - for example, 665h 4m. A dash is shown where no ticket has been closed yet.
4. Tickets that have not been assigned to any department are grouped under Unassigned.
5. Under Search, use the Select Department dropdown to restrict the report to a particular department.
6. In the Activity Panel, use the Columns options to show or hide columns (Department, Total Tickets, Open Ticket, Closed Ticket, In Progress, SLA Breached, Avg Resolution Time), and click EXPORT CSV under Export to download the report.
7. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Ticket Master Report

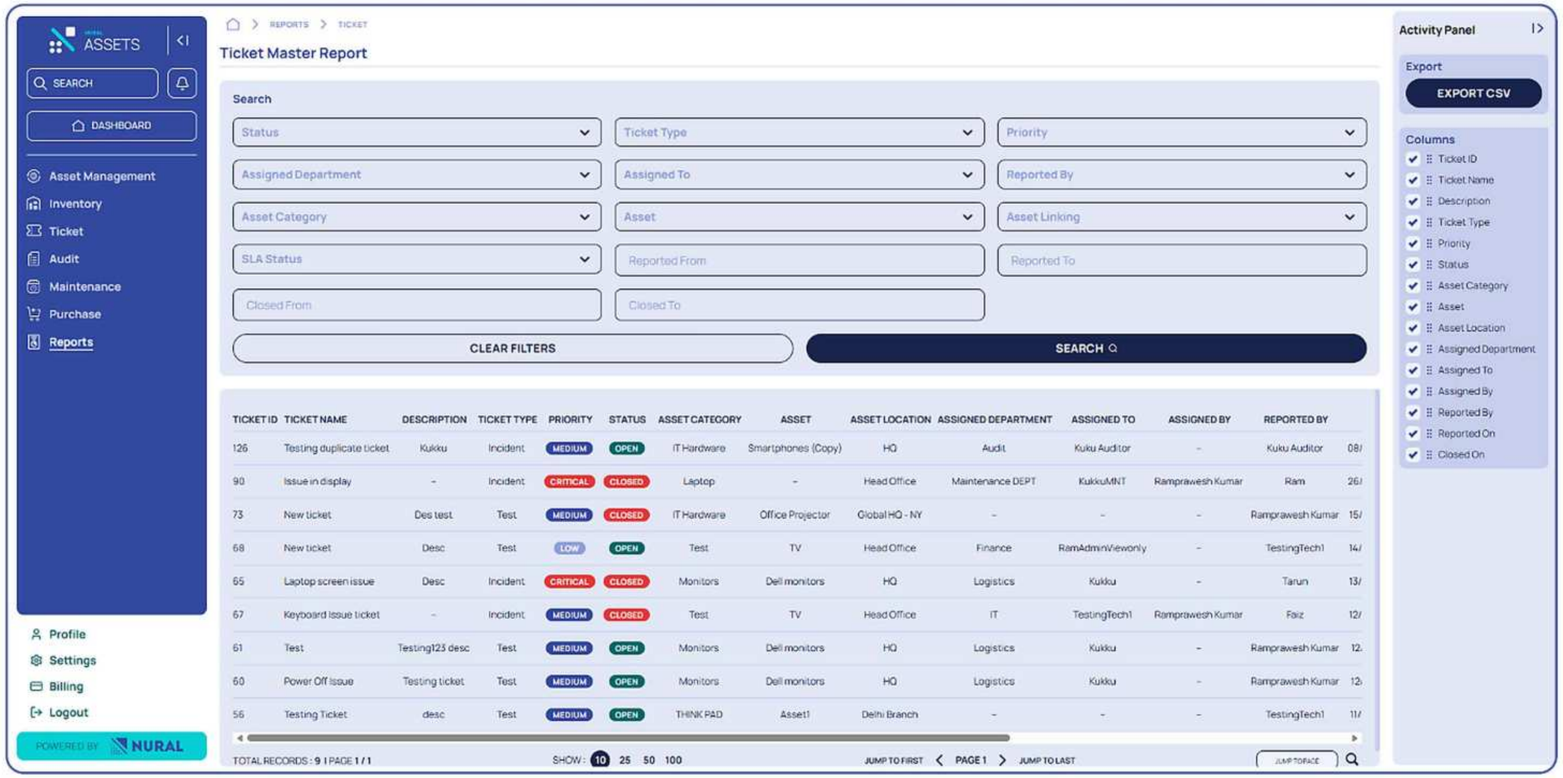


Figure 87 - Ticket Master Report

STEPS

1. Go to: Reports, then open Ticket Master Report under Ticket. The report gives the complete detail of every ticket raised in the system, with its Ticket ID, Ticket Name, Description, Ticket Type, Priority, Status, Asset Category, Asset, Asset Location, Assigned Department, Assigned To, Assigned By, Reported By, Reported On, and Closed On.

2. The Priority column shows the urgency of the ticket - for example, LOW, MEDIUM, or CRITICAL - and the Status column shows whether it is OPEN or CLOSED. A dash is shown where a value has not been set.

3. Under Search, narrow the report using the Status, Ticket Type, Priority, Assigned Department, Assigned To, Reported By, Asset Category, Asset, Asset Linking, and SLA Status dropdowns.

4. Use Reported From and Reported To to restrict the report to a reported date range, and Closed From and Closed To to restrict it to a closure date range.

Ticket Master Report

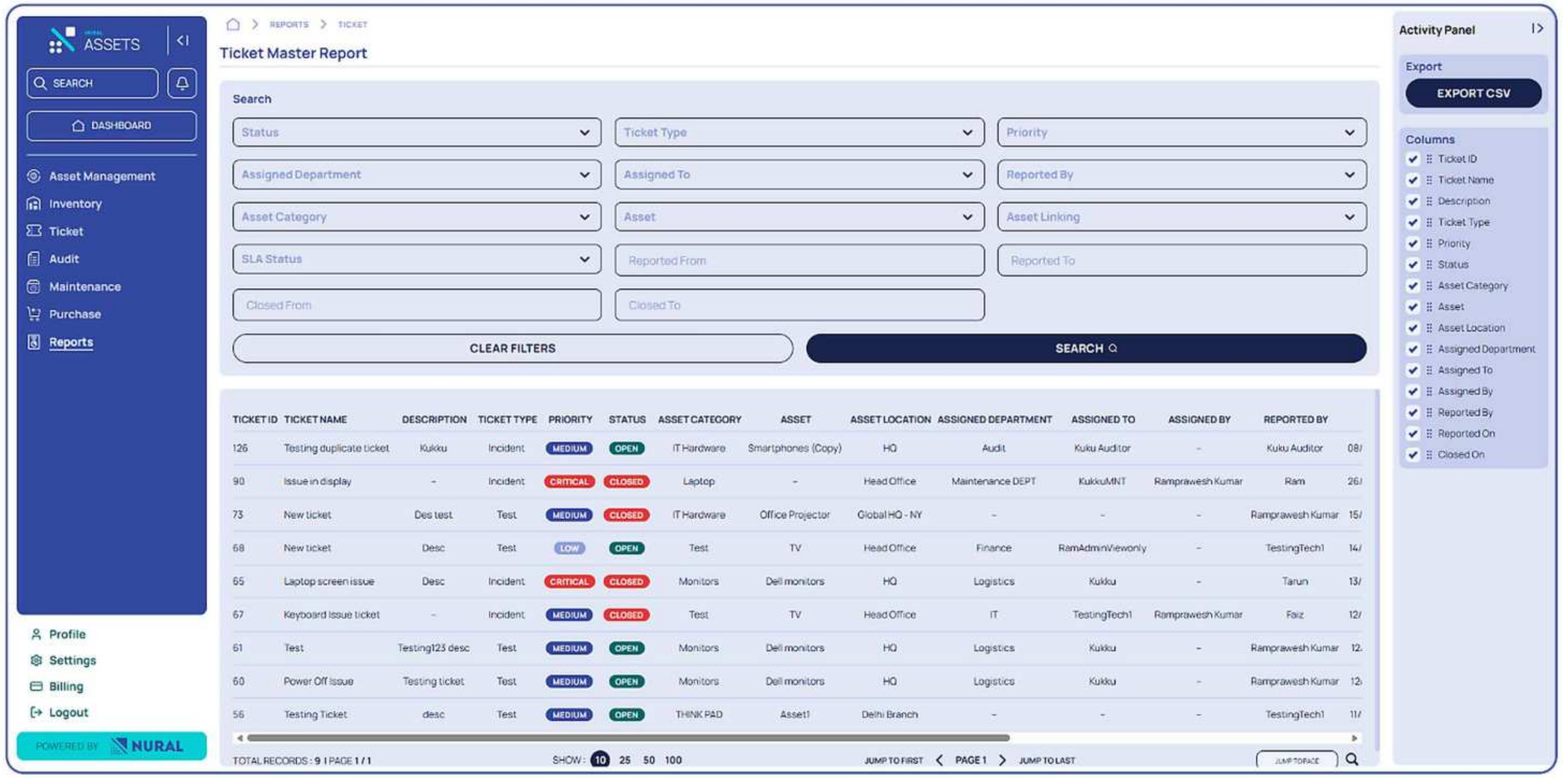


Figure 87 - Ticket Master Report

STEPS, CONTINUED

5. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

6. Use the horizontal scroll bar below the table to view the remaining columns.

7. In the Activity Panel, use the Columns options to show or hide columns (Ticket ID, Ticket Name, Description, Ticket Type, Priority, Status, Asset Category, Asset, Asset Location, Assigned Department, Assigned To, Assigned By, Reported By, Reported On, Closed On), and click EXPORT CSV under Export to download the report.

8. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Ticket Performance / SLA Report

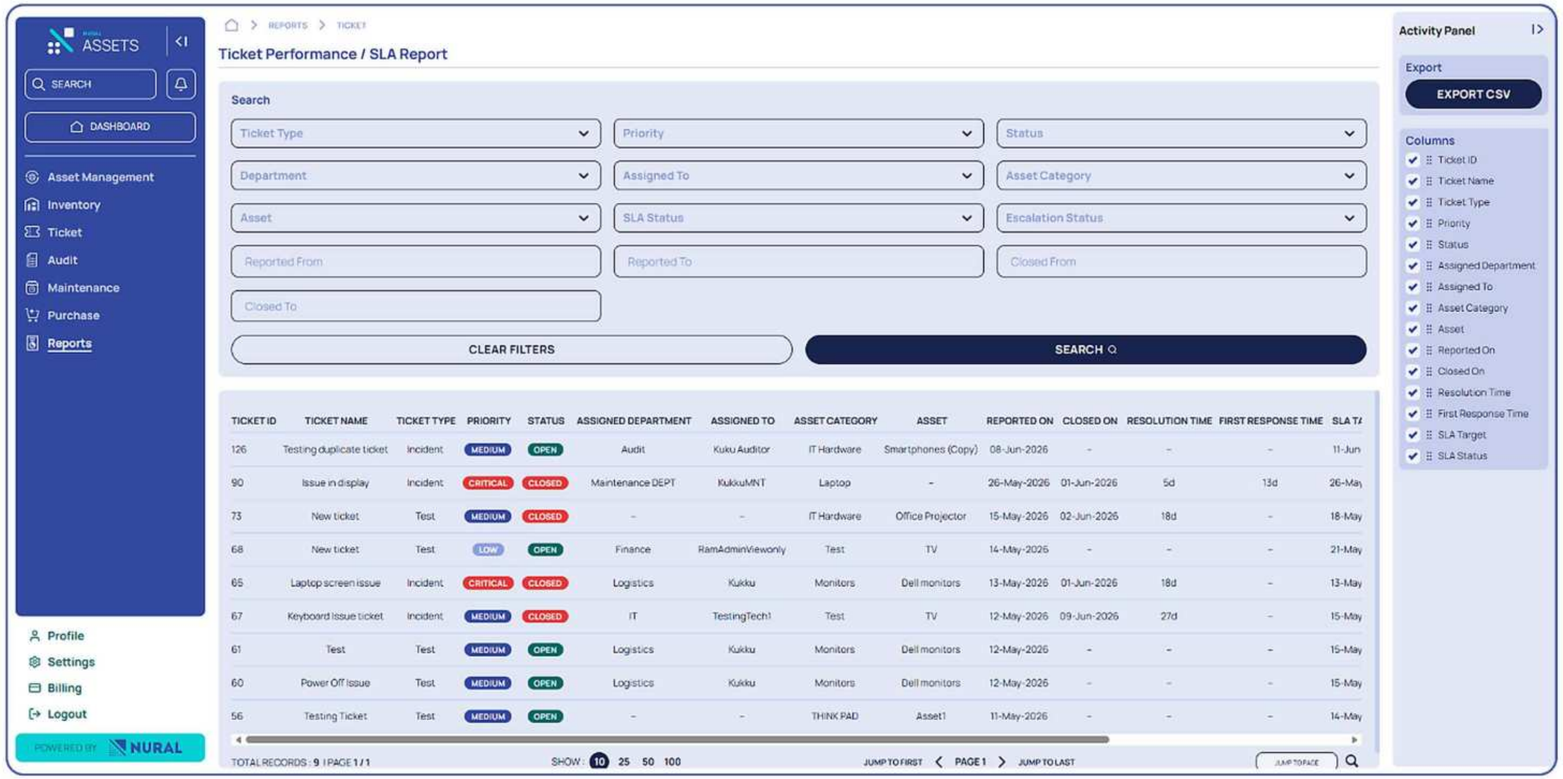


Figure 88 - Ticket Performance / SLA Report

STEPS

1. Go to: Reports, then open Ticket Performance / SLA Report under Ticket. The report measures ticket handling performance and lists each ticket with its Ticket ID, Ticket Name, Ticket Type, Priority, Status, Assigned Department, Assigned To, Asset Category, Asset, Reported On, Closed On, Resolution Time, First Response Time, SLA Target, and SLA Status.
2. Resolution Time is the time taken to close the ticket and First Response Time is the time taken to respond to it first, both shown in days - for example, 5d. SLA Target is the date by which the ticket should be resolved, and SLA Status shows whether that target was met or breached.
3. For tickets that are still open, the Closed On, Resolution Time, and First Response Time columns show a dash.
4. Under Search, narrow the report using the Ticket Type, Priority, Status, Department, Assigned To, Asset Category, Asset, SLA Status, and Escalation Status dropdowns.
5. Use Reported From and Reported To to restrict the report to a reported date range, and Closed From and Closed To to restrict it to a closure date range.

Ticket Performance / SLA Report

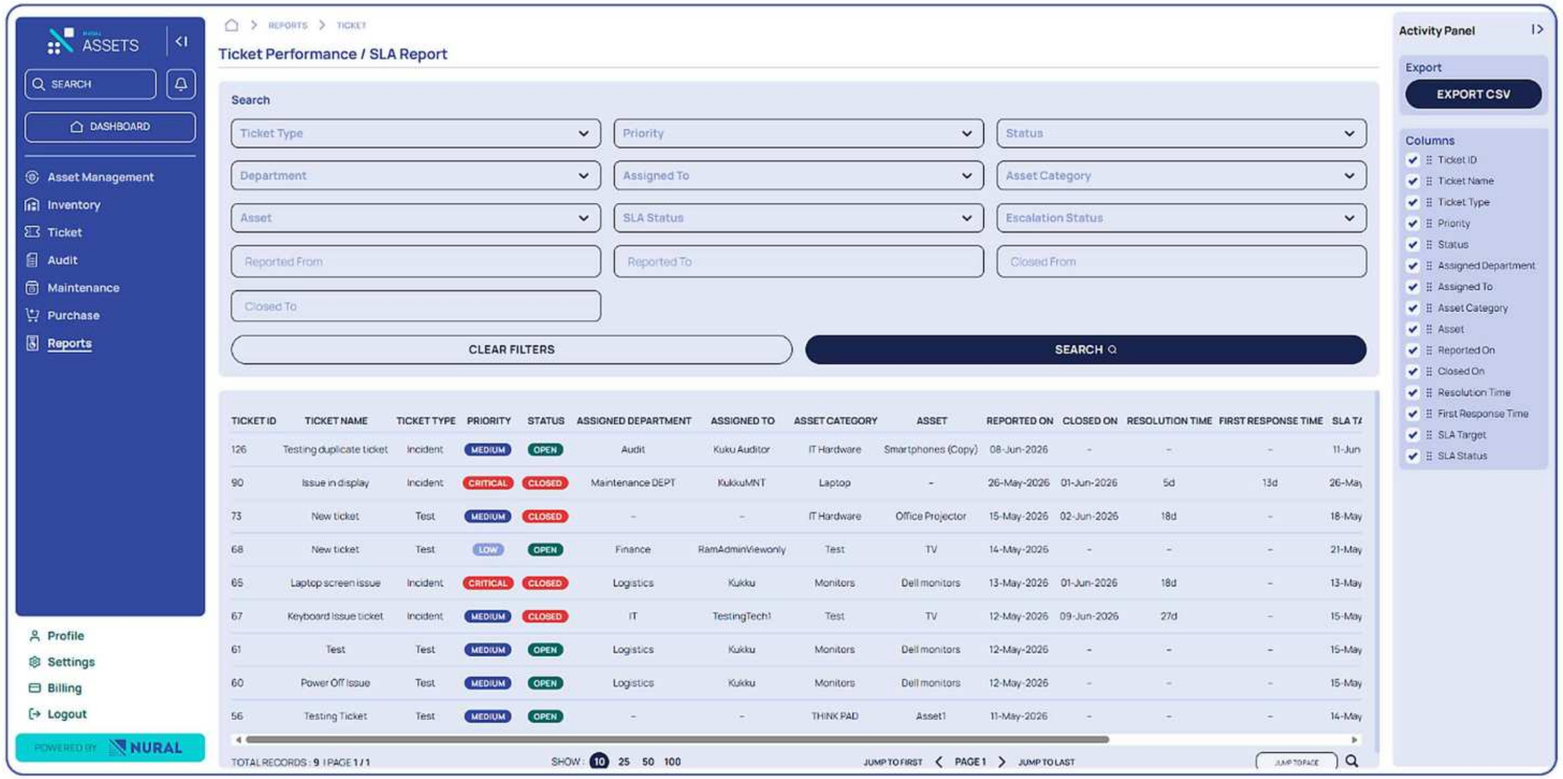


Figure 88 - Ticket Performance / SLA Report

STEPS, CONTINUED

6. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

7. Use the horizontal scroll bar below the table to view the remaining columns.

8. In the Activity Panel, use the Columns options to show or hide columns (Ticket ID, Ticket Name, Ticket Type, Priority, Status, Assigned Department, Assigned To, Asset Category, Asset, Reported On, Closed On, Resolution Time, First Response Time, SLA Target, SLA Status), and click EXPORT CSV under Export to download the report.

9. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Audit Summary Report

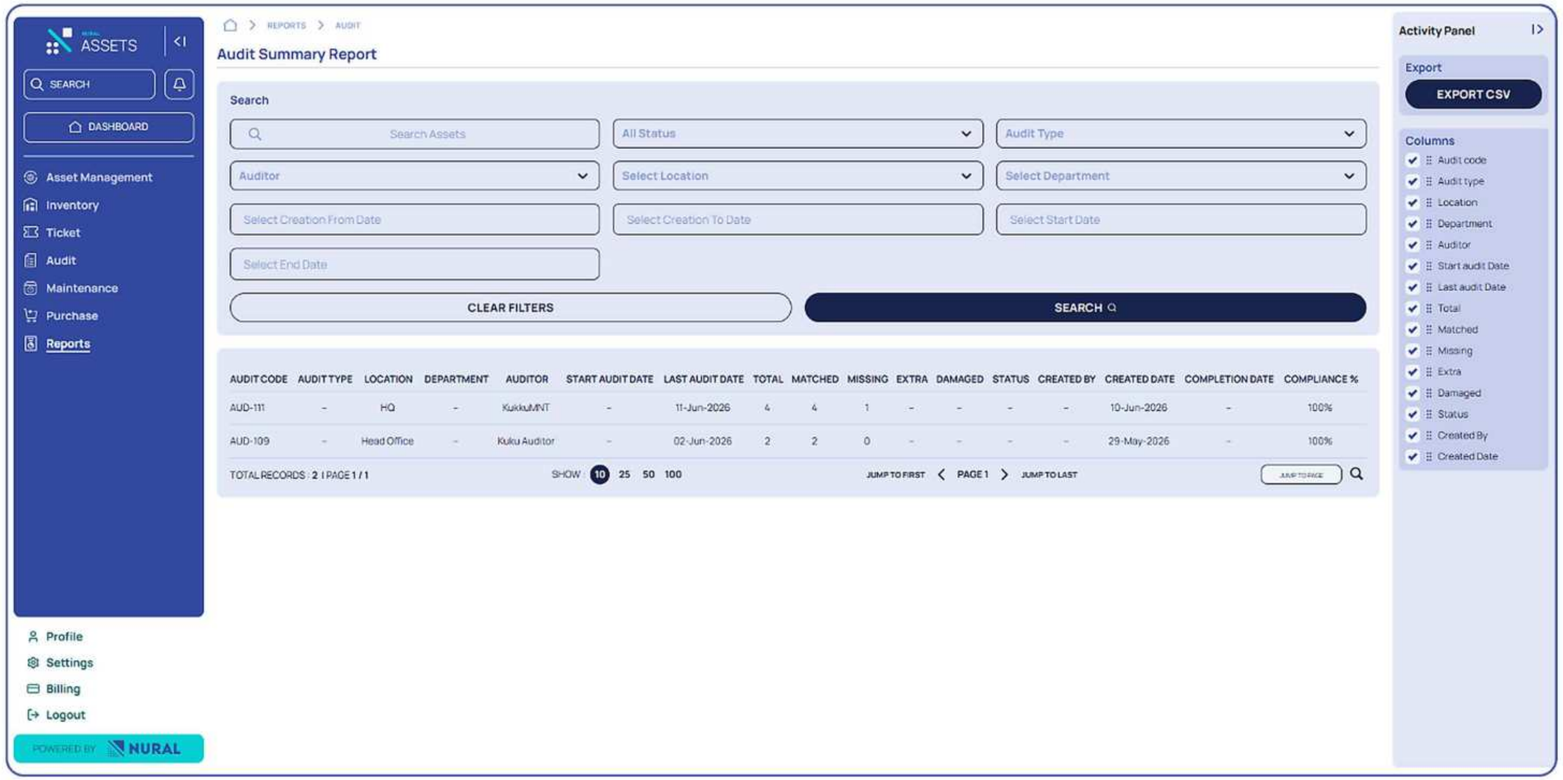


Figure 89 - Audit Summary Report

STEPS

1. Go to: Reports, then open Audit Summary Report under Audit. The report summarises every audit and lists each one with its Audit Code, Audit Type, Location, Department, Auditor, Start Audit Date, Last Audit Date, Total, Matched, Missing, Extra, Damaged, Status, Created By, Created Date, Completion Date, and Compliance %.
2. Total is the number of assets covered by the audit, while Matched, Missing, Extra, and Damaged show how many of those assets fell into each outcome. Compliance % is the share of audited assets that matched, for example 100%.
3. Where a value has not been recorded - such as Audit Type, Department, or Completion Date for an audit that is not yet complete - the column shows a dash.
4. Under Search, use the Search Assets box to look up an audit by asset, and narrow the report using the All Status, Audit Type, Auditor, Select Location, and Select Department dropdowns.
5. Use Select Creation From Date and Select Creation To Date to restrict the report to a creation date range, and Select Start Date and Select End Date to restrict it to an audit date range.

Audit Summary Report

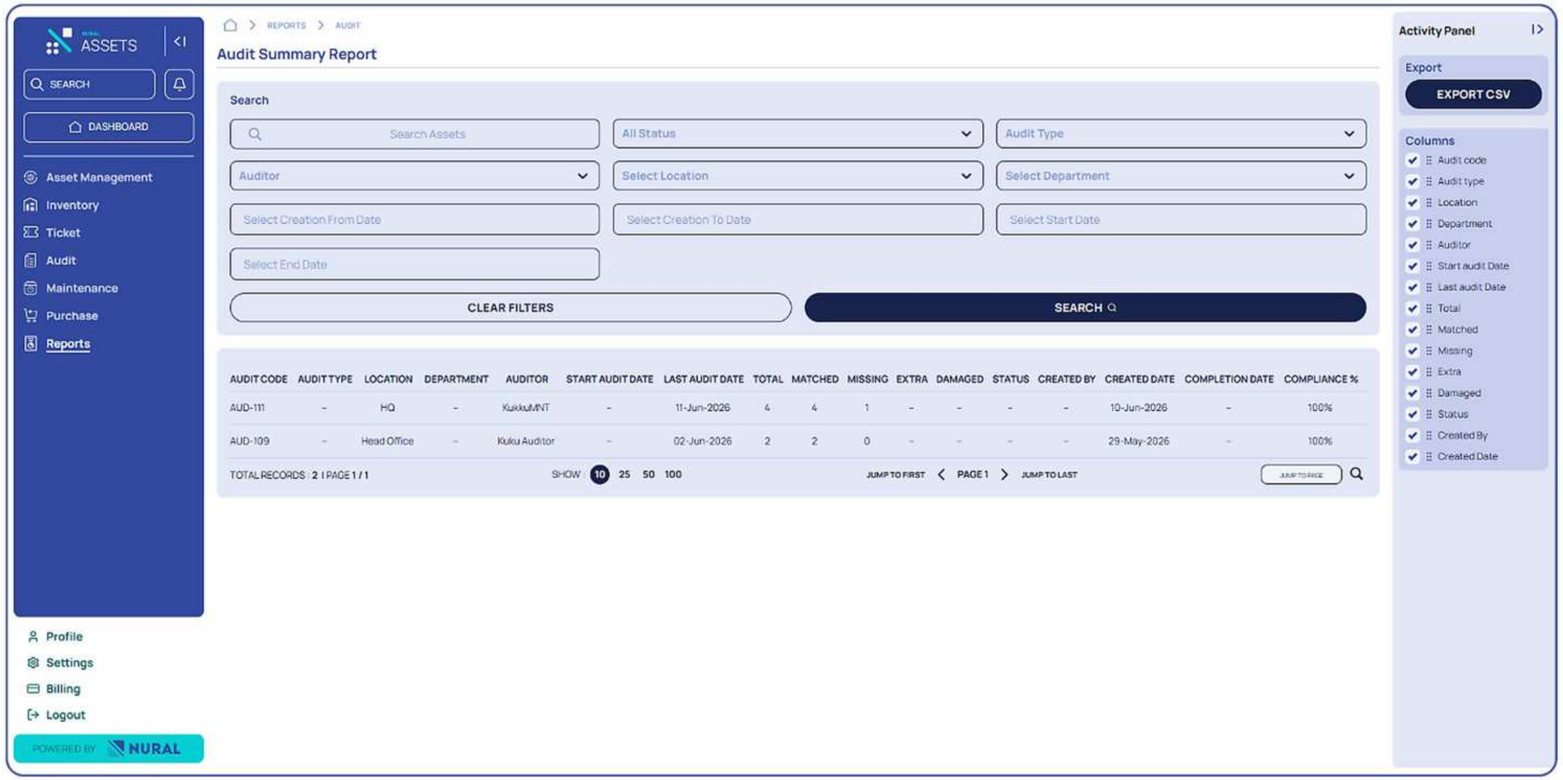


Figure 89 - Audit Summary Report

STEPS, CONTINUED

6. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

7. Use the horizontal scroll bar below the table to view the remaining columns.

8. In the Activity Panel, use the Columns options to show or hide columns (Audit code, Audit type, Location, Department, Auditor, Start audit Date, Last audit Date, Total, Matched, Missing, Extra, Damaged, Status, Created By, Created Date), and click EXPORT CSV under Export to download the report.

9. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Auditor Performance Report

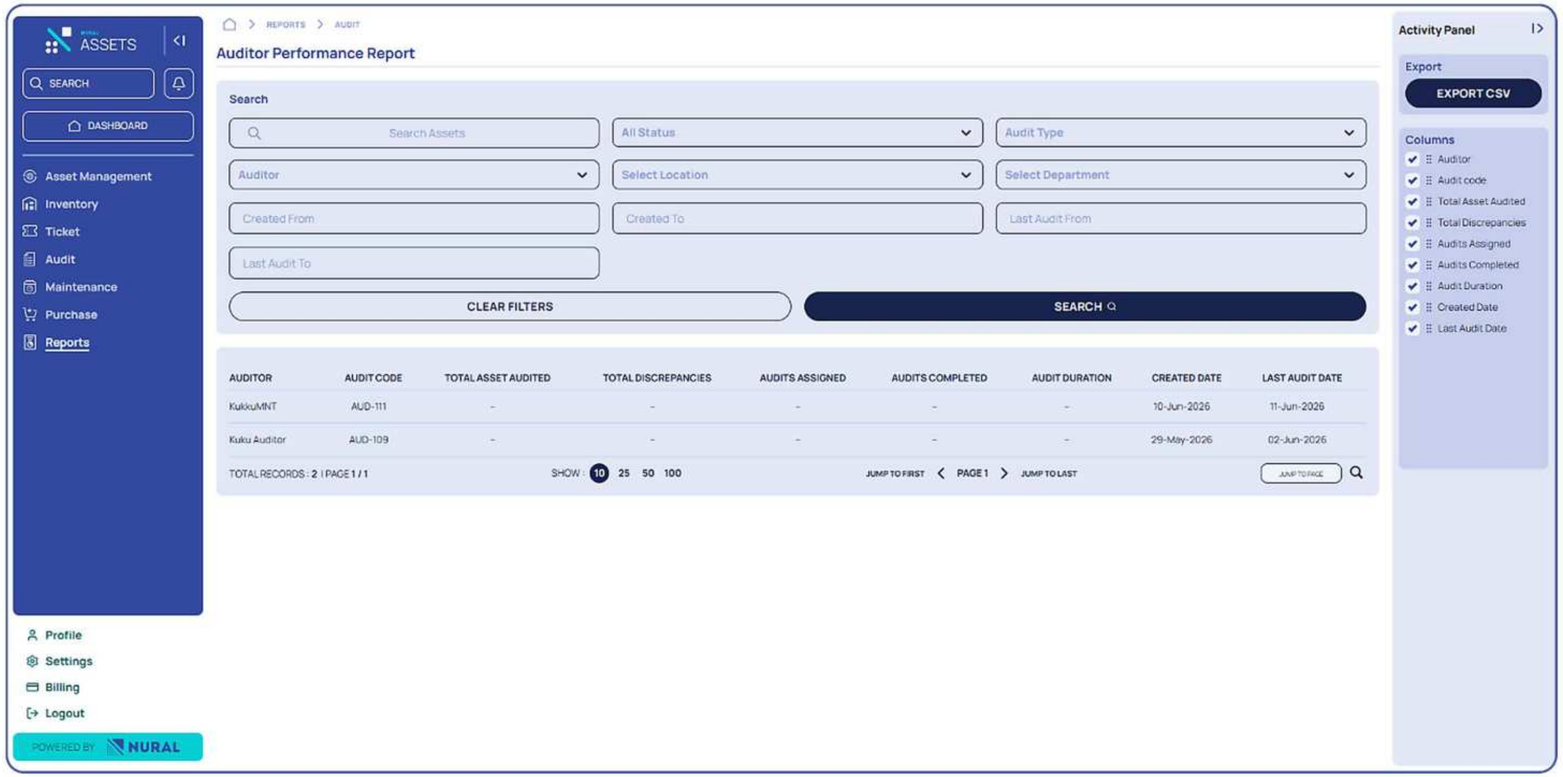


Figure 90 - Auditor Performance Report

STEPS

1. Go to: Reports, then open Auditor Performance Report under Audit. The report measures how each auditor is performing and lists Auditor, Audit Code, Total Asset Audited, Total Discrepancies, Audits Assigned, Audits Completed, Audit Duration, Created Date, and Last Audit Date.

2. Total Asset Audited is the number of assets the auditor has checked and Total Discrepancies is the number of mismatches found. Audits Assigned and Audits Completed show the auditor's workload against work finished, and Audit Duration is the time taken to complete the audit.

3. Where a value has not been recorded - for example, for an audit that is still in progress - the column shows a dash.

4. Under Search, use the Search Assets box to look up an auditor's record by asset, and narrow the report using the All Status, Audit Type, Auditor, Select Location, and Select Department dropdowns.

Auditor Performance Report

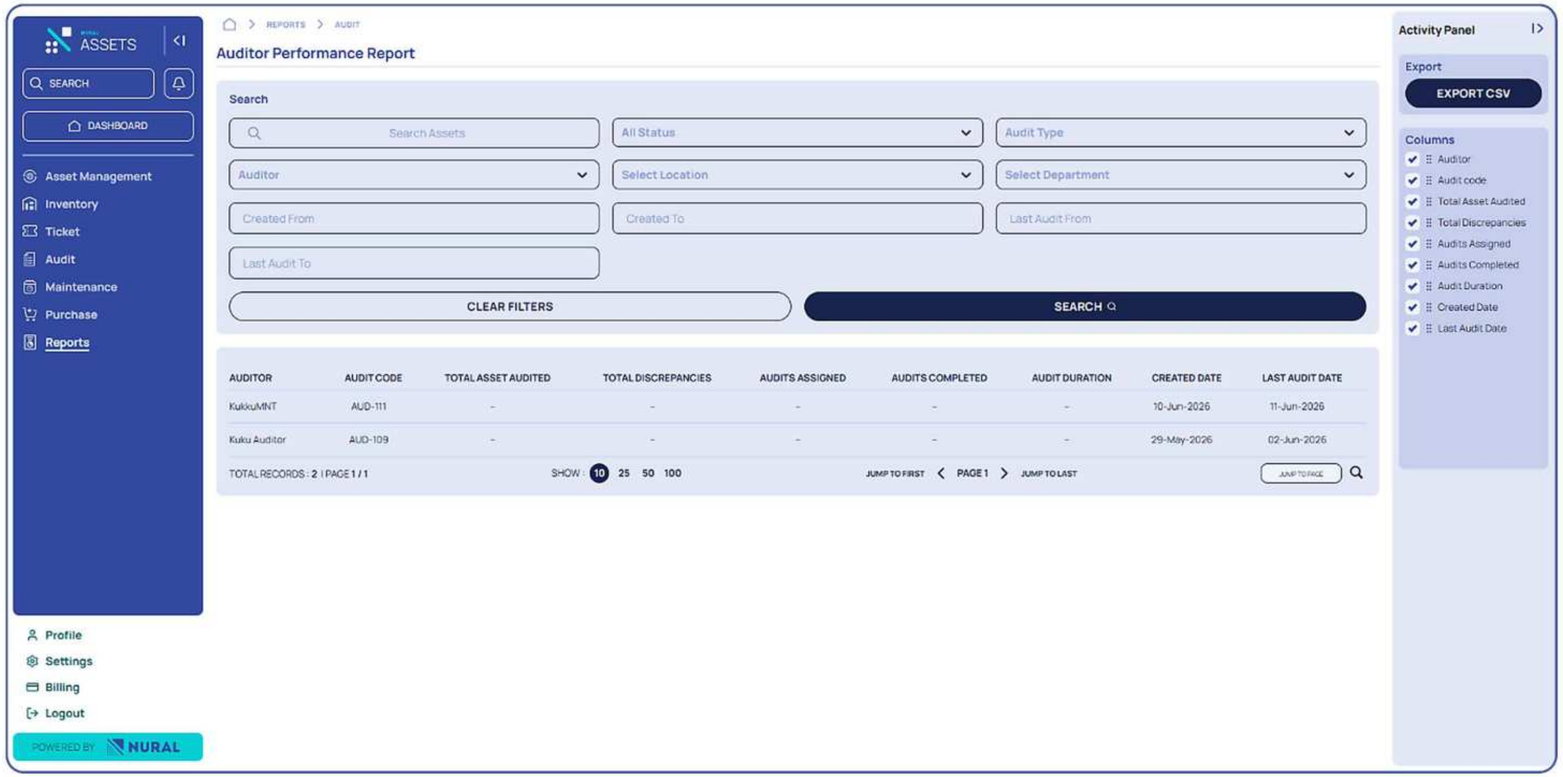


Figure 90 - Auditor Performance Report

STEPS, CONTINUED

5. Use Created From and Created To to restrict the report to a creation date range, and Last Audit From and Last Audit To to restrict it to a last audit date range.

6. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

7. In the Activity Panel, use the Columns options to show or hide columns (Auditor, Audit code, Total Asset Audited, Total Discrepancies, Audits Assigned, Audits Completed, Audit Duration, Created Date, Last Audit Date), and click EXPORT CSV under Export to download the report.

8. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Audit Compliance Report

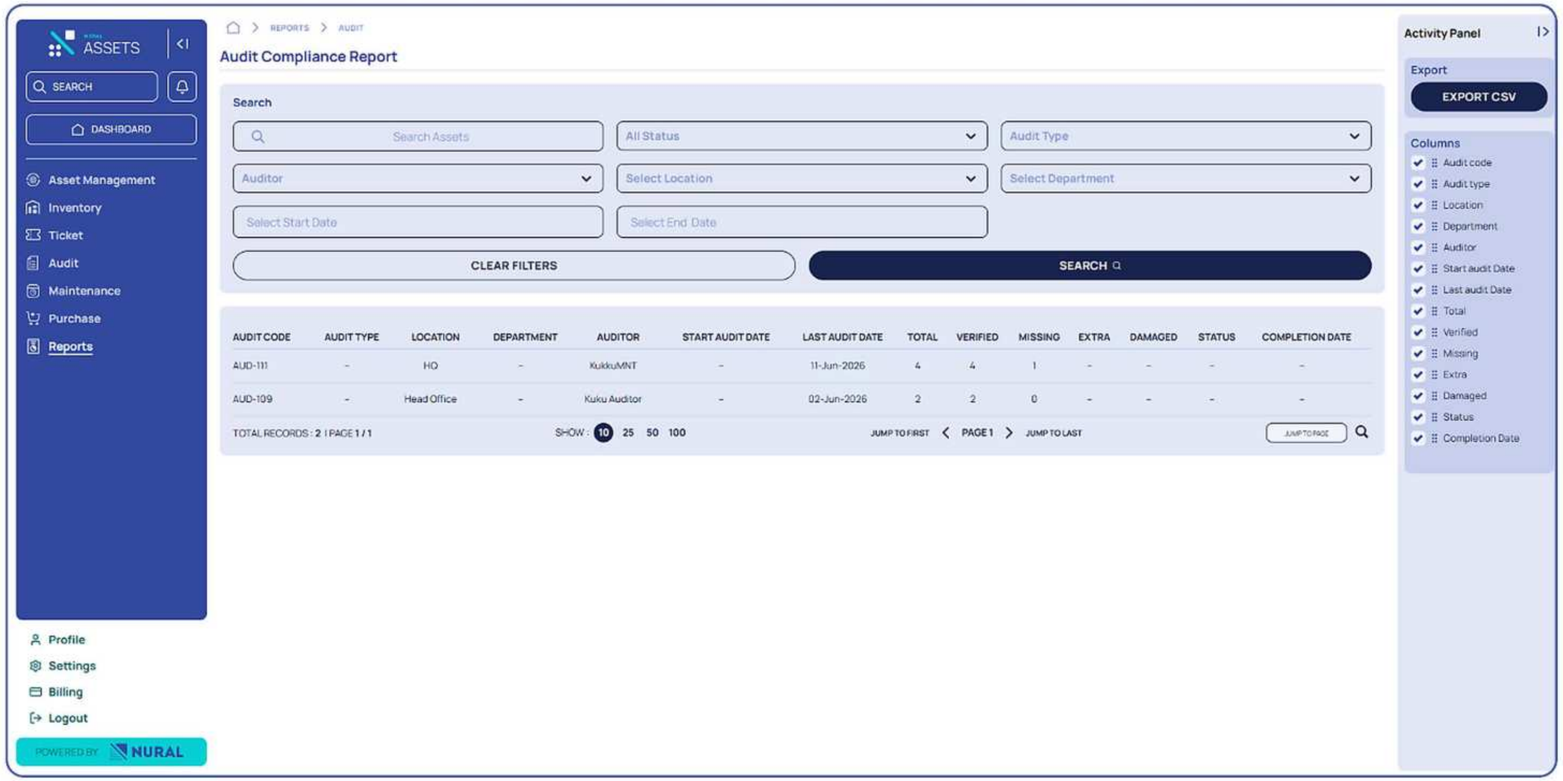


Figure 91 - Audit Compliance Report

STEPS

1. Go to: Reports, then open Audit Compliance Report under Audit. The report shows how far each audit complies with the assets on record and lists Audit Code, Audit Type, Location, Department, Auditor, Start Audit Date, Last Audit Date, Total, Verified, Missing, Extra, Damaged, Status, and Completion Date.
2. Total is the number of assets covered by the audit, while Verified, Missing, Extra, and Damaged show how many of those assets fell into each outcome - for example, 4 total with 4 verified and 1 missing.
3. Where a value has not been recorded - such as Audit Type, Department, Status, or Completion Date for an audit that is not yet complete - the column shows a dash.
4. Under Search, use the Search Assets box to look up an audit by asset, and narrow the report using the All Status, Audit Type, Auditor, Select Location, and Select Department dropdowns.
5. Use Select Start Date and Select End Date to restrict the report to an audit date range.

Audit Compliance Report

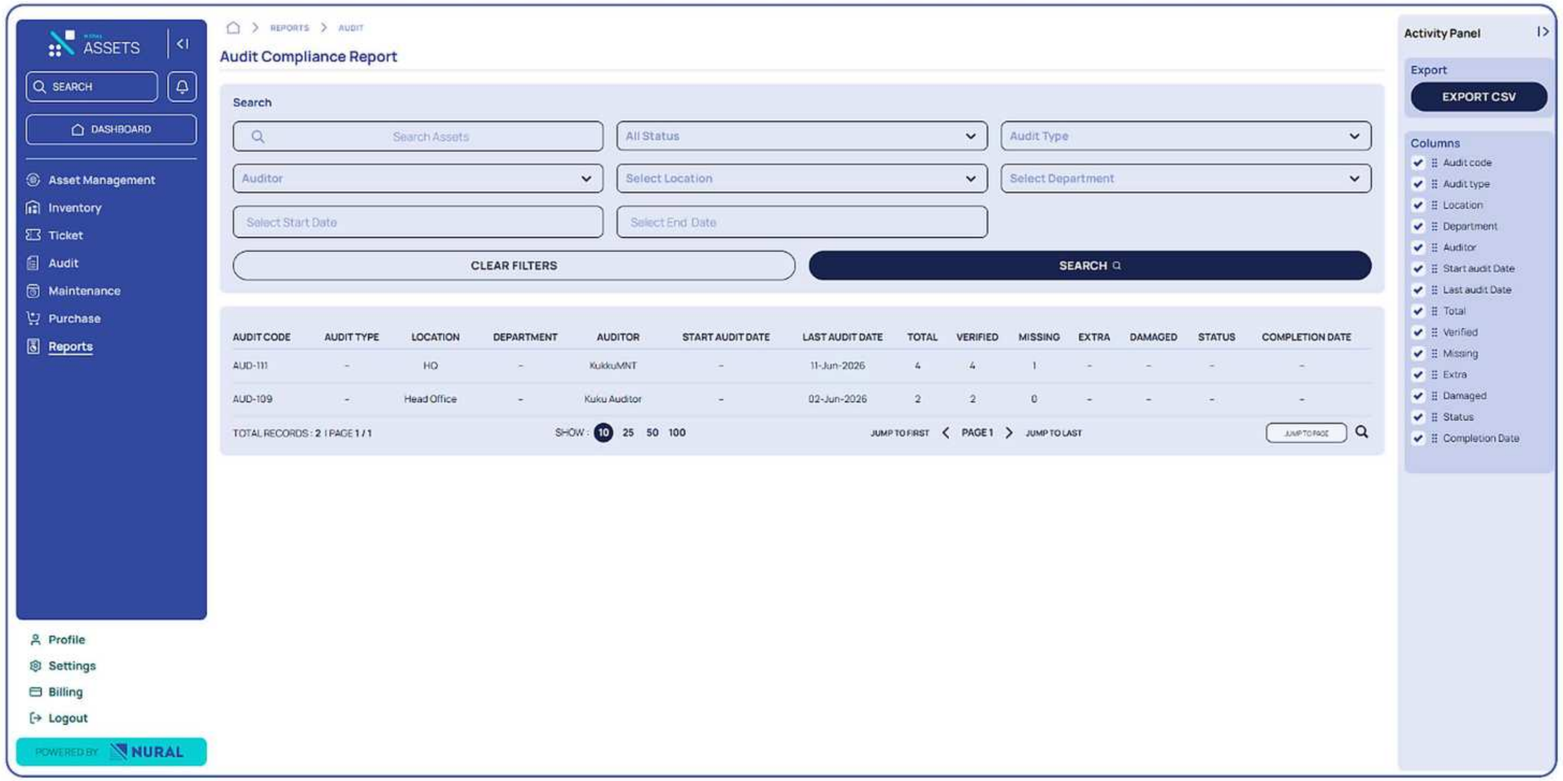


Figure 91 - Audit Compliance Report

STEPS, CONTINUED

6. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

7. Use the horizontal scroll bar below the table to view the remaining columns.

8. In the Activity Panel, use the Columns options to show or hide columns (Audit code, Audit type, Location, Department, Auditor, Start audit Date, Last audit Date, Total, Verified, Missing, Extra, Damaged, Status, Completion Date), and click EXPORT CSV under Export to download the report.

9. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Audit Detailed Report

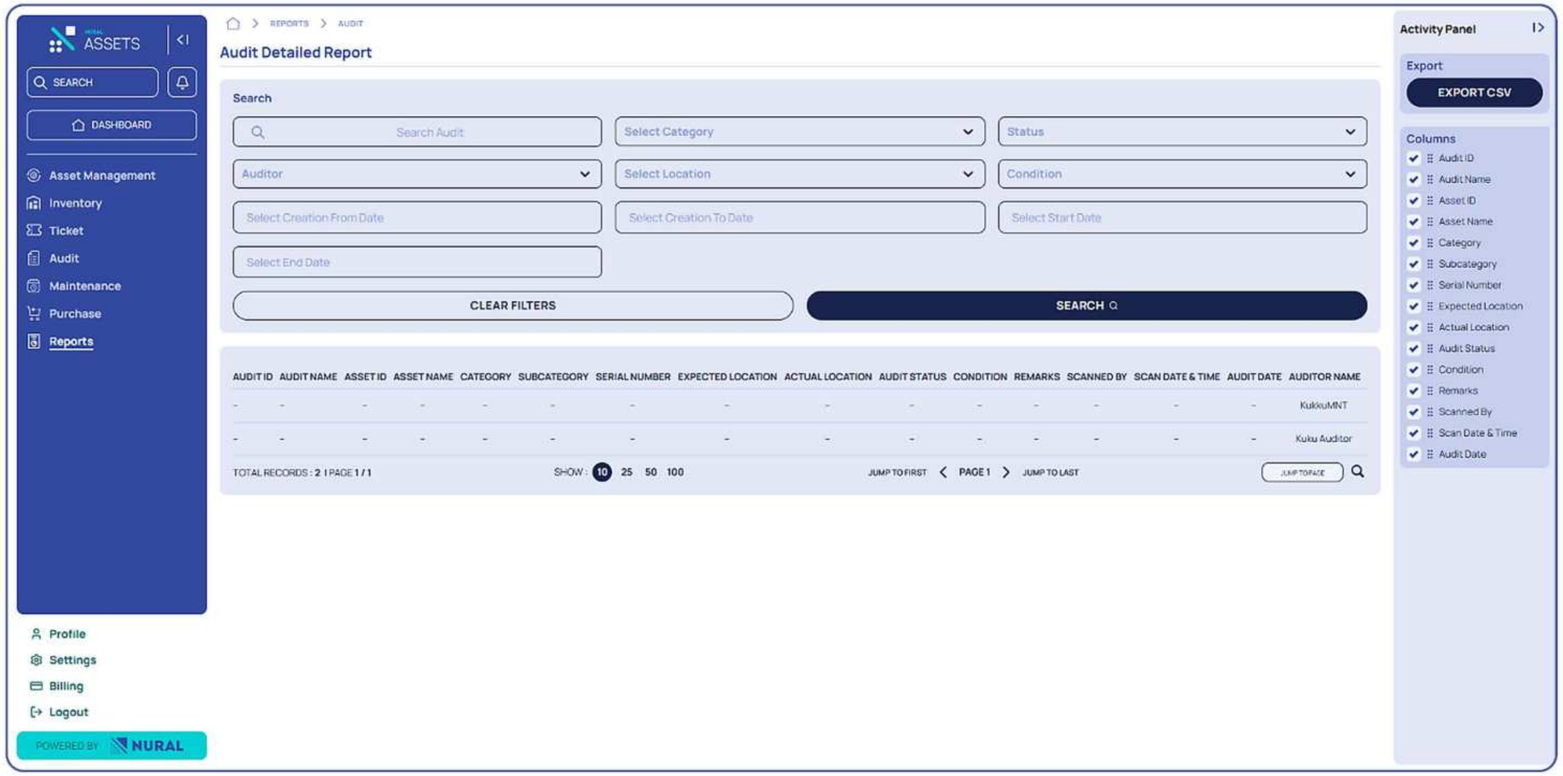


Figure 92 - Audit Detailed Report

STEPS

1. Go to: Reports, then open Audit Detailed Report under Audit. The report lists every asset checked in an audit, line by line, with its Audit ID, Audit Name, Asset ID, Asset Name, Category, Subcategory, Serial Number, Expected Location, Actual Location, Audit Status, Condition, Remarks, Scanned By, Scan Date & Time, Audit Date, and Auditor Name.
2. Expected Location is where the asset should be as per records and Actual Location is where it was found during the audit, so a difference between the two indicates a discrepancy. Condition records the physical state of the asset and Remarks carries any note the auditor added.
3. Where a value has not been recorded - for example, for an asset that has not yet been scanned - the column shows a dash.
4. Under Search, use the Search Audit box to look up an audit by name, and narrow the report using the Select Category, Status, Auditor, Select Location, and Condition dropdowns.
5. Use Select Creation From Date and Select Creation To Date to restrict the report to a creation date range, and Select Start Date and Select End Date to restrict it to an audit date range.

Audit Detailed Report

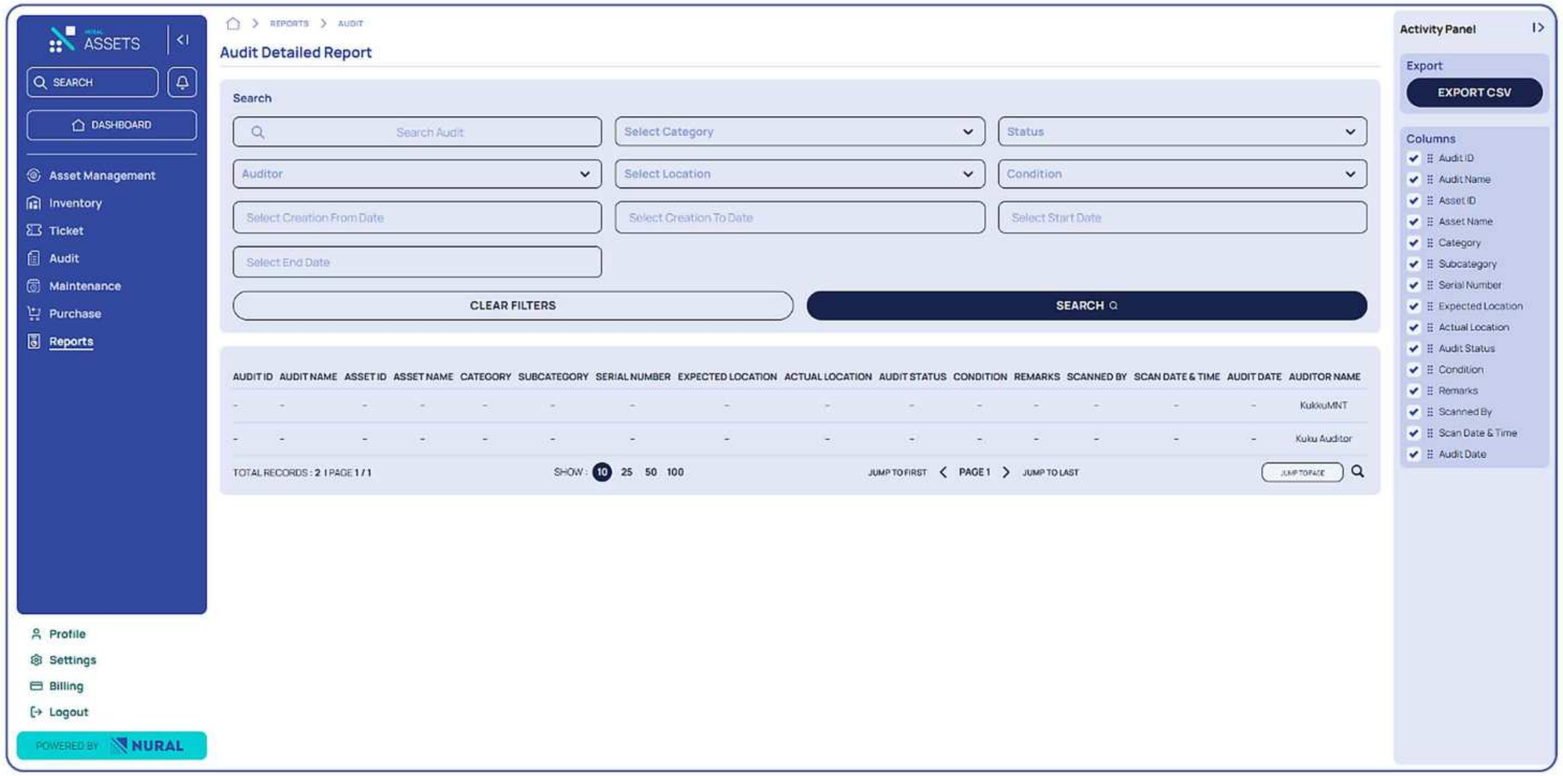


Figure 92 - Audit Detailed Report

STEPS, CONTINUED

6. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

7. Use the horizontal scroll bar below the table to view the remaining columns.

8. In the Activity Panel, use the Columns options to show or hide columns (Audit ID, Audit Name, Asset ID, Asset Name, Category, Subcategory, Serial Number, Expected Location, Actual Location, Audit Status, Condition, Remarks, Scanned By, Scan Date & Time, Audit Date), and click EXPORT CSV under Export to download the report.

9. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Category Wise Audit Report

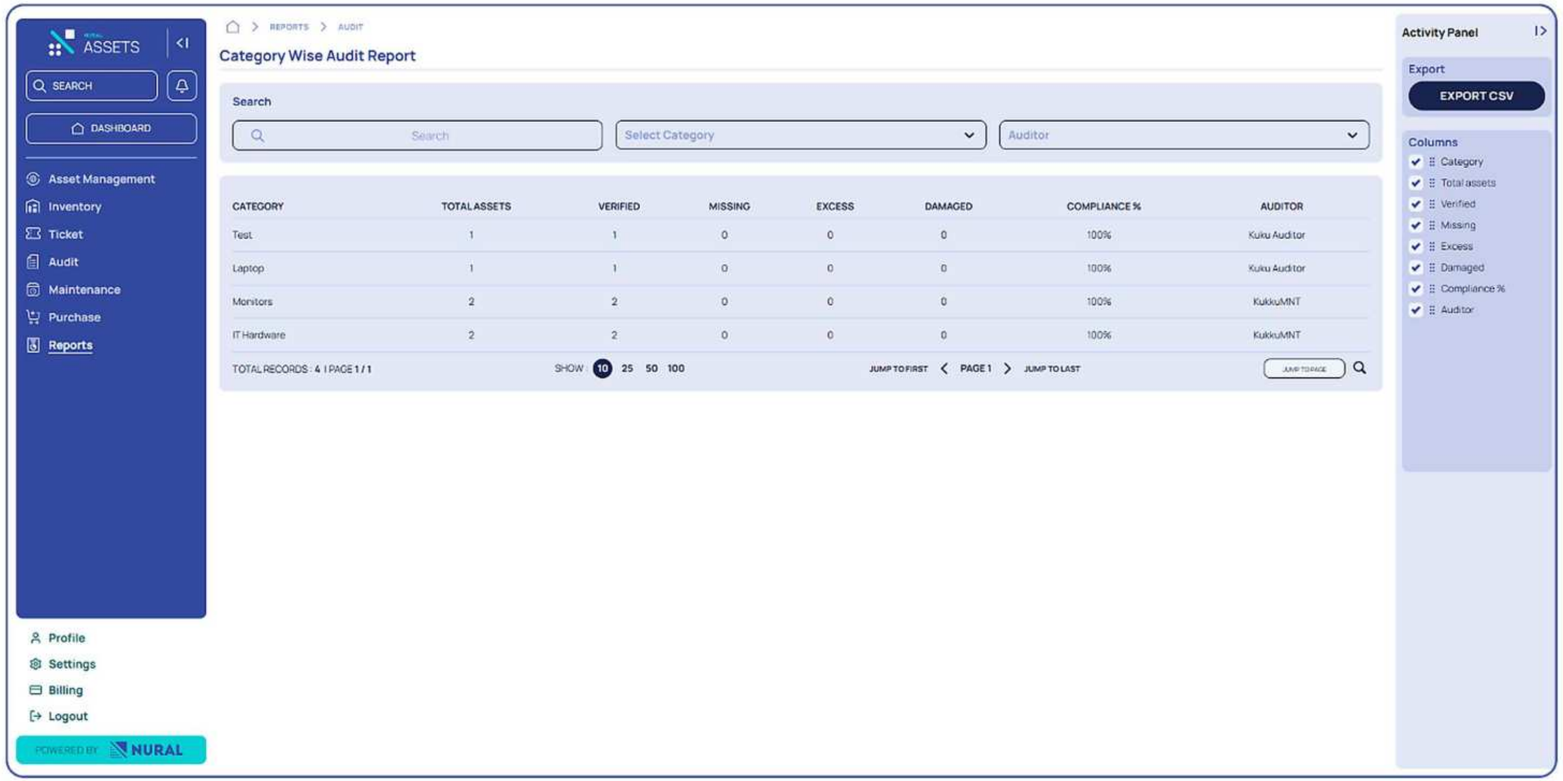


Figure 93 - Category Wise Audit Report

STEPS

1. Go to: Reports, then open Category Wise Audit Report under Audit. The report groups audit results by asset category and lists Category, Total Assets, Verified, Missing, Excess, Damaged, Compliance %, and Auditor.
2. Total Assets is the number of assets audited in that category, while Verified, Missing, Excess, and Damaged show how many of those assets fell into each outcome. Compliance % is the share of assets in the category that were verified, for example 100%.
3. Auditor shows the auditor responsible for the assets in that category.
4. Under Search, use the Search box to look up a category, and narrow the report using the Select Category and Auditor dropdowns.
5. In the Activity Panel, use the Columns options to show or hide columns (Category, Total assets, Verified, Missing, Excess, Damaged, Compliance %, Auditor), and click EXPORT CSV under Export to download the report.
6. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Discrepancy Report

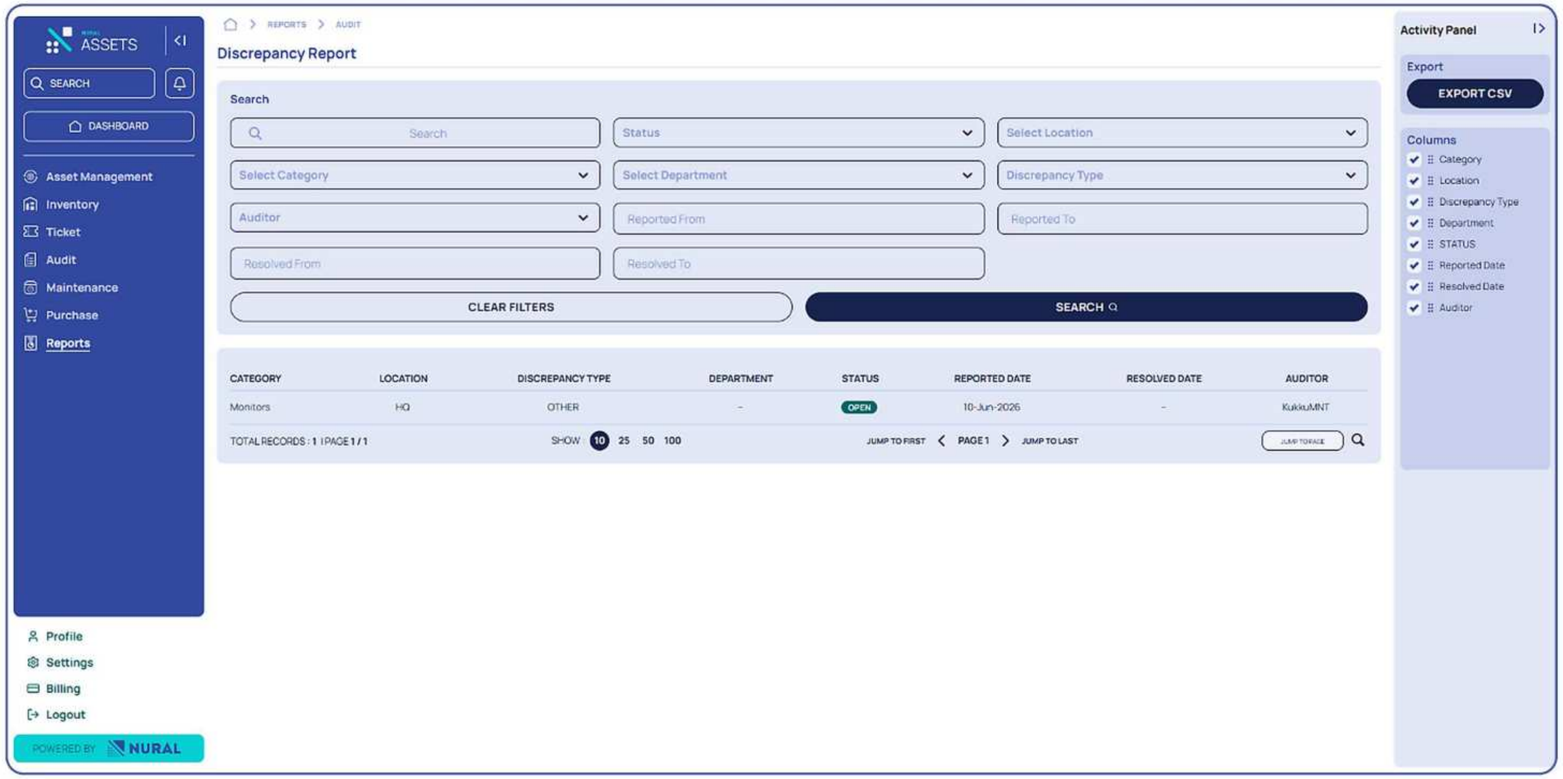


Figure 94 - Discrepancy Report

STEPS

1. Go to: Reports, then open Discrepancy Report under Audit. The report lists every discrepancy raised during audits, with its Category, Location, Discrepancy Type, Department, Status, Reported Date, Resolved Date, and Auditor.
2. Discrepancy Type records the nature of the mismatch - for example, Other - and Status shows whether it is still Open or has been closed. Reported Date is when the discrepancy was raised and Resolved Date is when it was settled.
3. Where a value has not been recorded - such as Department, or Resolved Date for a discrepancy that is still open - the column shows a dash.
4. Under Search, use the Search box to look up a discrepancy, and narrow the report using the Status, Select Location, Select Category, Select Department, Discrepancy Type, and Auditor dropdowns.

Discrepancy Report

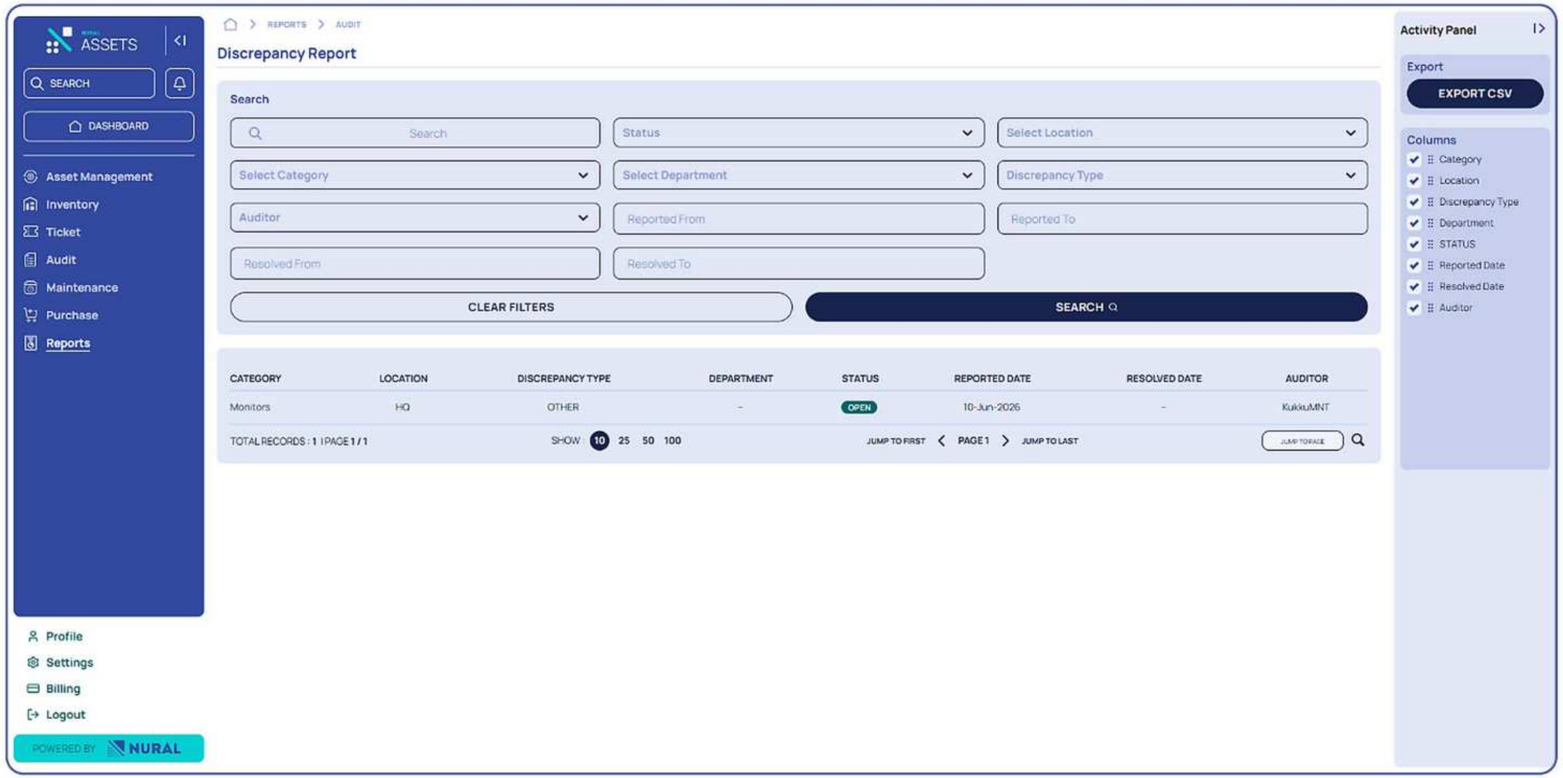


Figure 94 - Discrepancy Report

STEPS, CONTINUED

5. Use Reported From and Reported To to restrict the report to a reported date range, and Resolved From and Resolved To to restrict it to a resolved date range.

6. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

7. In the Activity Panel, use the Columns options to show or hide columns (Category, Location, Discrepancy Type, Department, STATUS, Reported Date, Resolved Date, Auditor), and click EXPORT CSV under Export to download the report.

8. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Maintenance Schedule Report

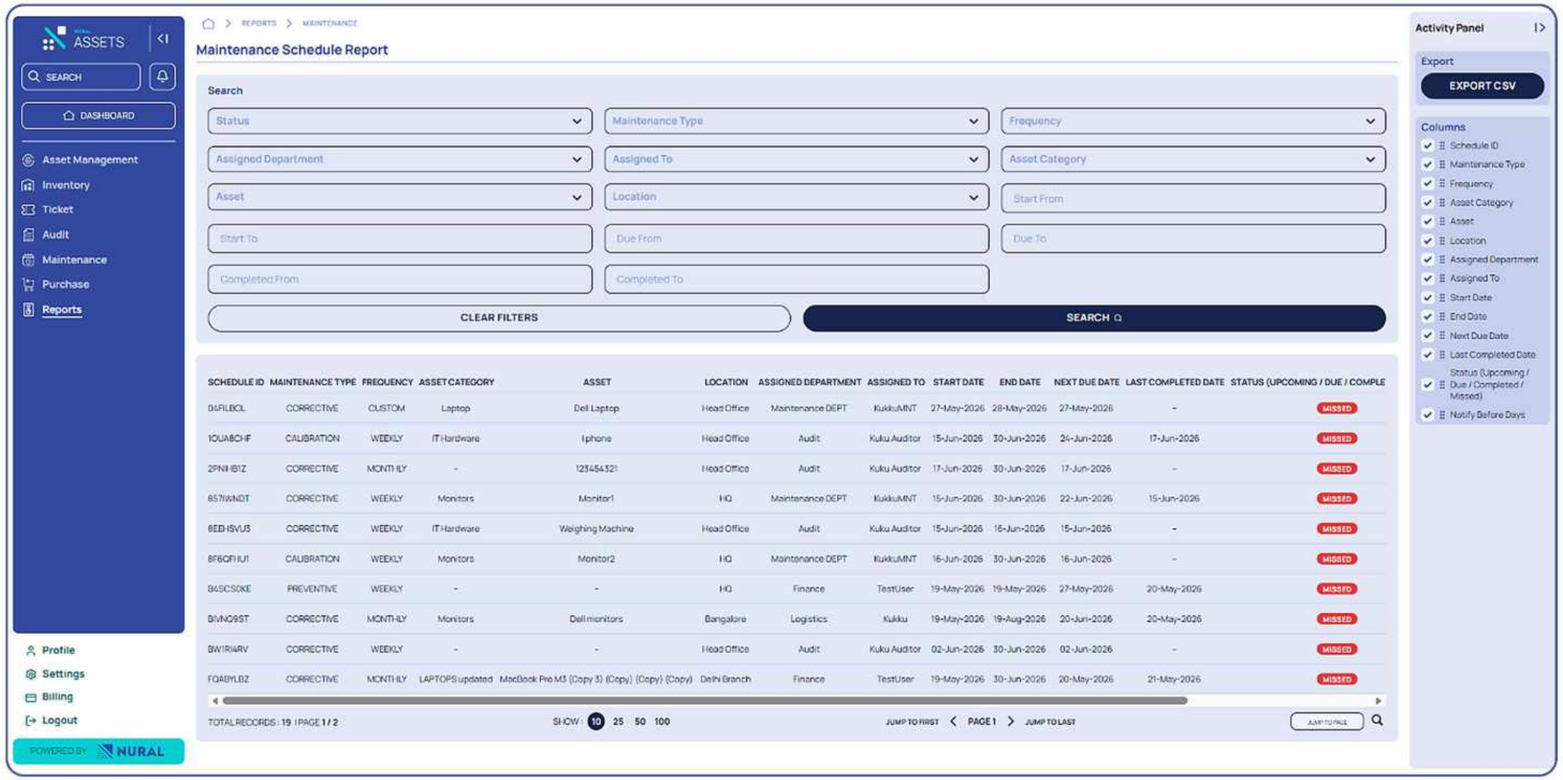


Figure 95 - Maintenance Schedule Report

STEPS

1. Go to: Reports, then open Maintenance Schedule Report under Maintenance. The report lists every maintenance schedule with its Schedule ID, Maintenance Type, Frequency, Asset Category, Asset, Location, Assigned Department, Assigned To, Start Date, End Date, Next Due Date, Last Completed Date, and Status.
2. Maintenance Type records the kind of work planned - for example, Corrective, Preventive, or Calibration - and Frequency shows how often it recurs, such as Weekly, Monthly, or Custom.
3. Next Due Date is when the schedule falls due again and Last Completed Date is when it was last carried out. Status shows whether the schedule is Upcoming, Due, Completed, or Missed.
4. Where a value has not been recorded - such as Asset Category, or Last Completed Date for a schedule that has never been carried out - the column shows a dash.
5. Under Search, narrow the report using the Status, Maintenance Type, Frequency, Assigned Department, Assigned To, Asset Category, Asset, and Location dropdowns.

Maintenance Schedule Report

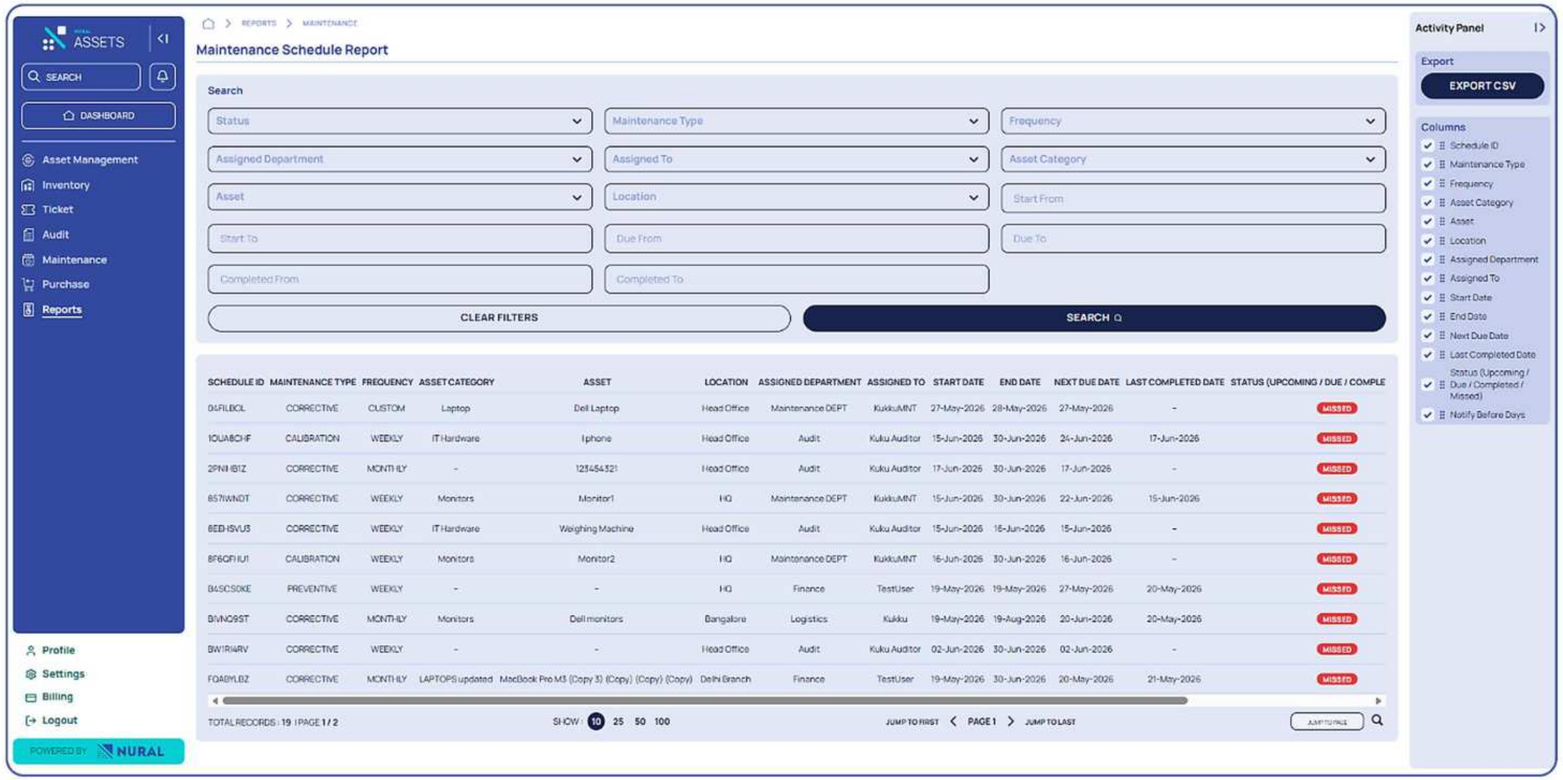


Figure 95 - Maintenance Schedule Report

STEPS, CONTINUED

6. Use Start From and Start To to restrict the report to a start date range, Due From and Due To to restrict it to a due date range, and Completed From and Completed To to restrict it to a completion date range.

7. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

8. Use the horizontal scroll bar below the table to view the remaining columns.

9. In the Activity Panel, use the Columns options to show or hide columns (Schedule ID, Maintenance Type, Frequency, Asset Category, Asset, Location, Assigned Department, Assigned To, Start Date, End Date, Next Due Date, Last Completed Date, Status, Notify Before Days), and click EXPORT CSV under Export to download the report.

10. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Maintenance Performance Report

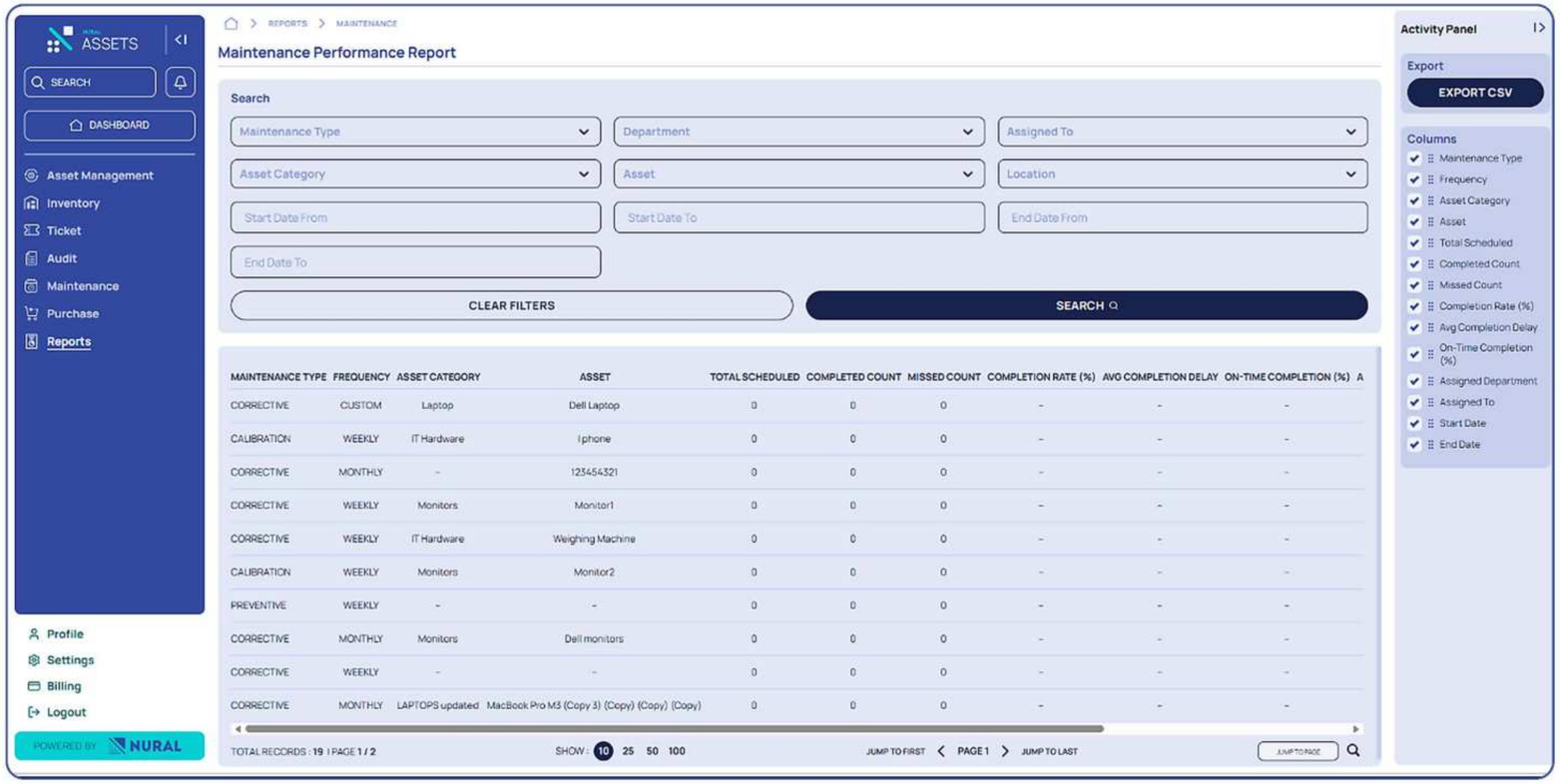


Figure 96 - Maintenance Performance Report

STEPS

1. Go to: Reports, then open Maintenance Performance Report under Maintenance. The report summarises how maintenance schedules have performed, with Maintenance Type, Frequency, Asset Category, Asset, Total Scheduled, Completed Count, Missed Count, Completion Rate (%), Avg Completion Delay, On-Time Completion (%), Assigned Department, Assigned To, Start Date, and End Date.
2. Total Scheduled is the number of maintenance occurrences planned for that asset, while Completed Count and Missed Count show how many were carried out and how many were not.
3. Completion Rate (%) is the share of scheduled maintenance that was completed, and On-Time Completion (%) is the share completed on or before the due date.
4. Avg Completion Delay is the average time between the due date and the actual completion date, so a rising figure indicates maintenance is being closed late.
5. Where a value cannot be calculated - for example, Completion Rate (%), Avg Completion Delay, or On-Time Completion (%) for an asset with nothing completed yet - the column shows a dash.
6. Under Search, narrow the report using the Maintenance Type, Department, Assigned To, Asset Category, Asset, and Location dropdowns.

Maintenance Performance Report

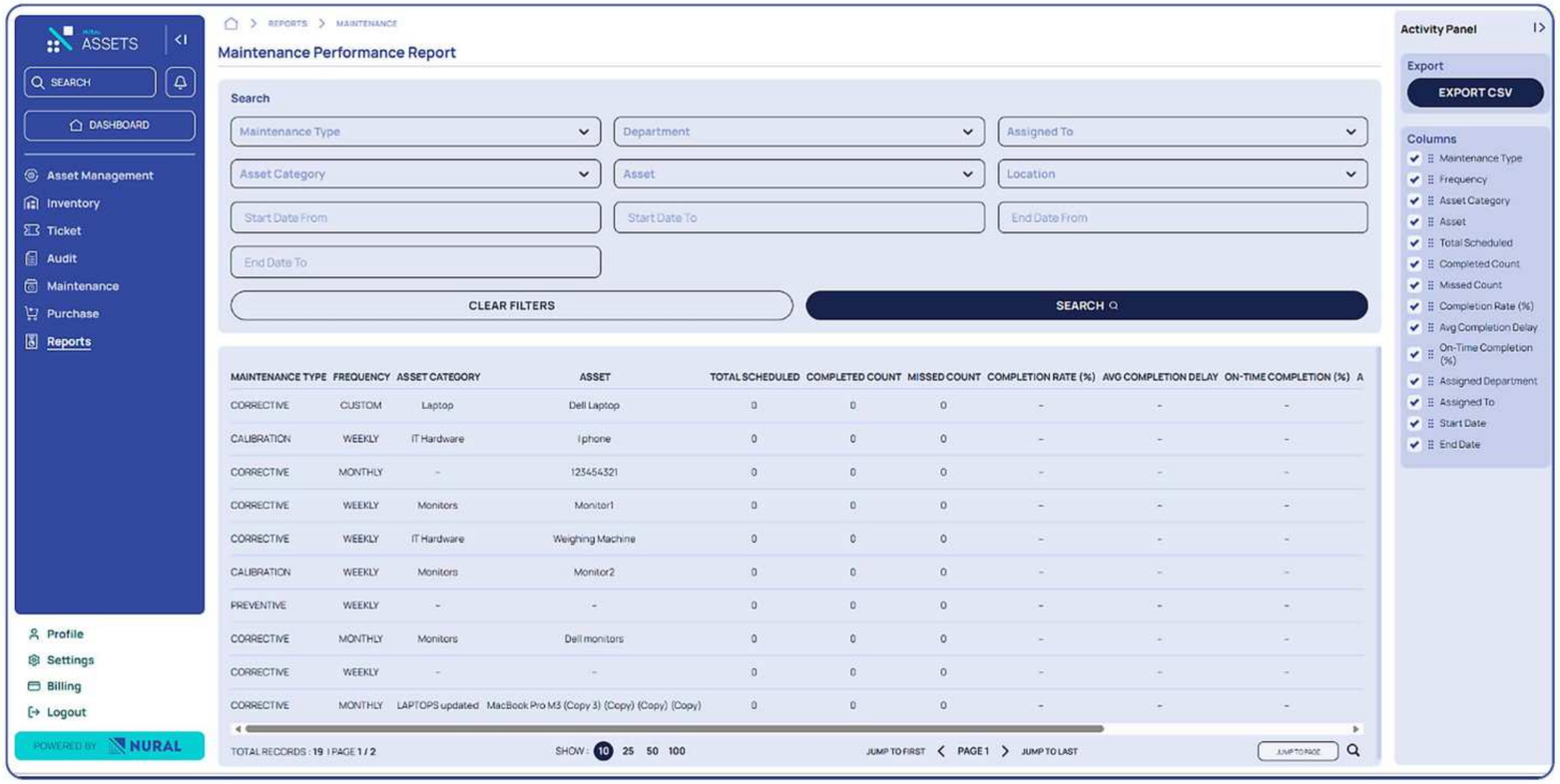


Figure 96 - Maintenance Performance Report

STEPS, CONTINUED

7. Use Start Date From and Start Date To to restrict the report to a schedule start date range, and End Date From and End Date To to restrict it to a schedule end date range.

8. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

9. Use the horizontal scroll bar below the table to view the remaining columns.

10. In the Activity Panel, use the Columns options to show or hide columns (Maintenance Type, Frequency, Asset Category, Asset, Total Scheduled, Completed Count, Missed Count, Completion Rate (%), Avg Completion Delay, On-Time Completion (%), Assigned Department, Assigned To, Start Date, End Date), and click EXPORT CSV under Export to download the report.

11. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Purchase Requisition Report

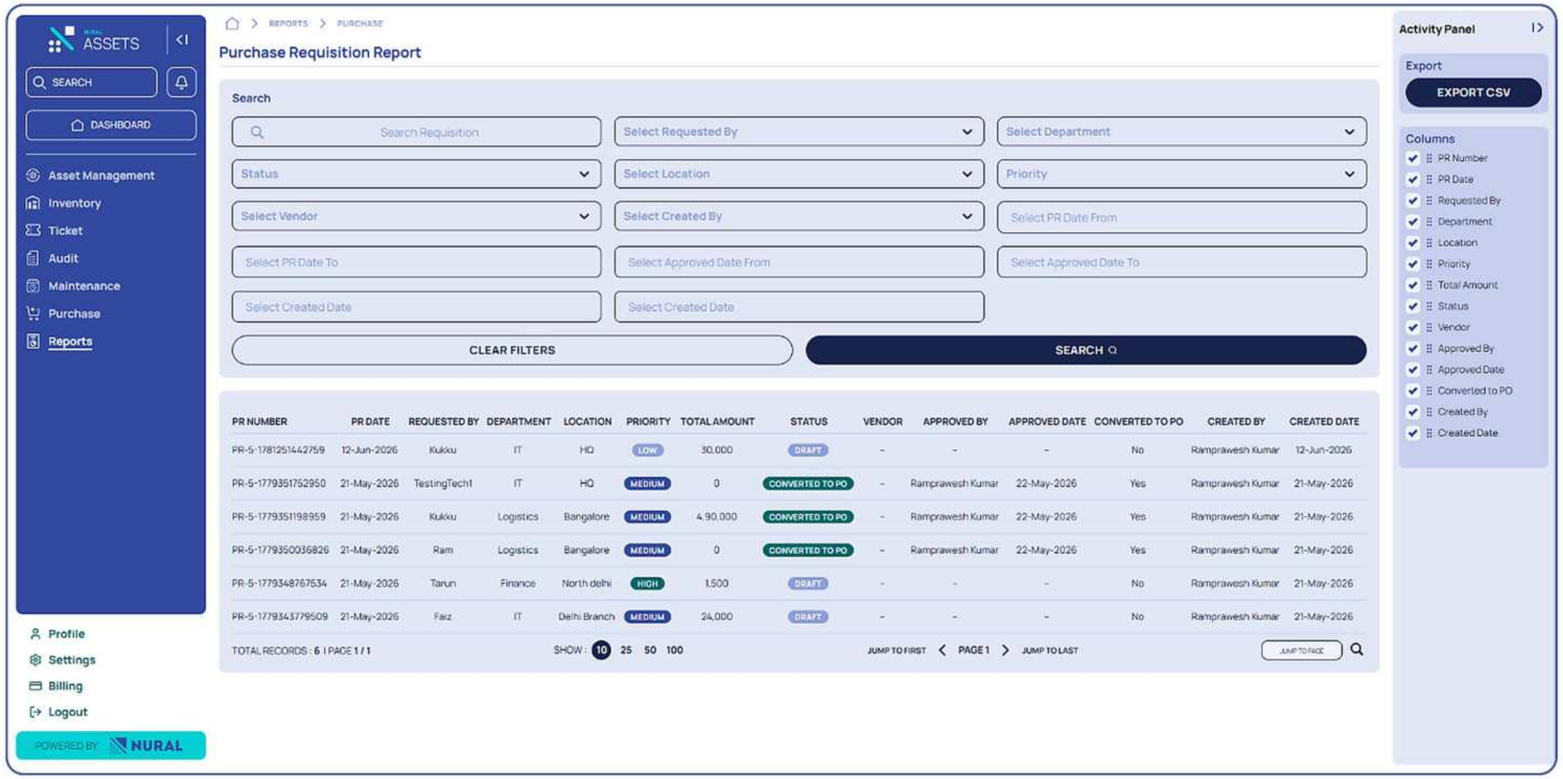


Figure 97 - Purchase Requisition Report

STEPS

1. Go to: Reports, then open Purchase Requisition Report under Purchase. The report lists every purchase requisition with its PR Number, PR Date, Requested By, Department, Location, Priority, Total Amount, Status, Vendor, Approved By, Approved Date, Converted to PO, Created By, and Created Date.
2. Priority shows the urgency assigned to the requisition - Low, Medium, or High - and Status shows where it has reached, such as Draft or Converted to PO.
3. Converted to PO reads Yes once a purchase order has been raised against the requisition and No while it is still awaiting conversion.
4. Requested By is the person the requisition is raised for, while Created By is the user who entered it; these are often different people.
5. Where a value has not been recorded - such as Vendor, Approved By, or Approved Date for a requisition still in Draft - the column shows a dash.

Purchase Requisition Report

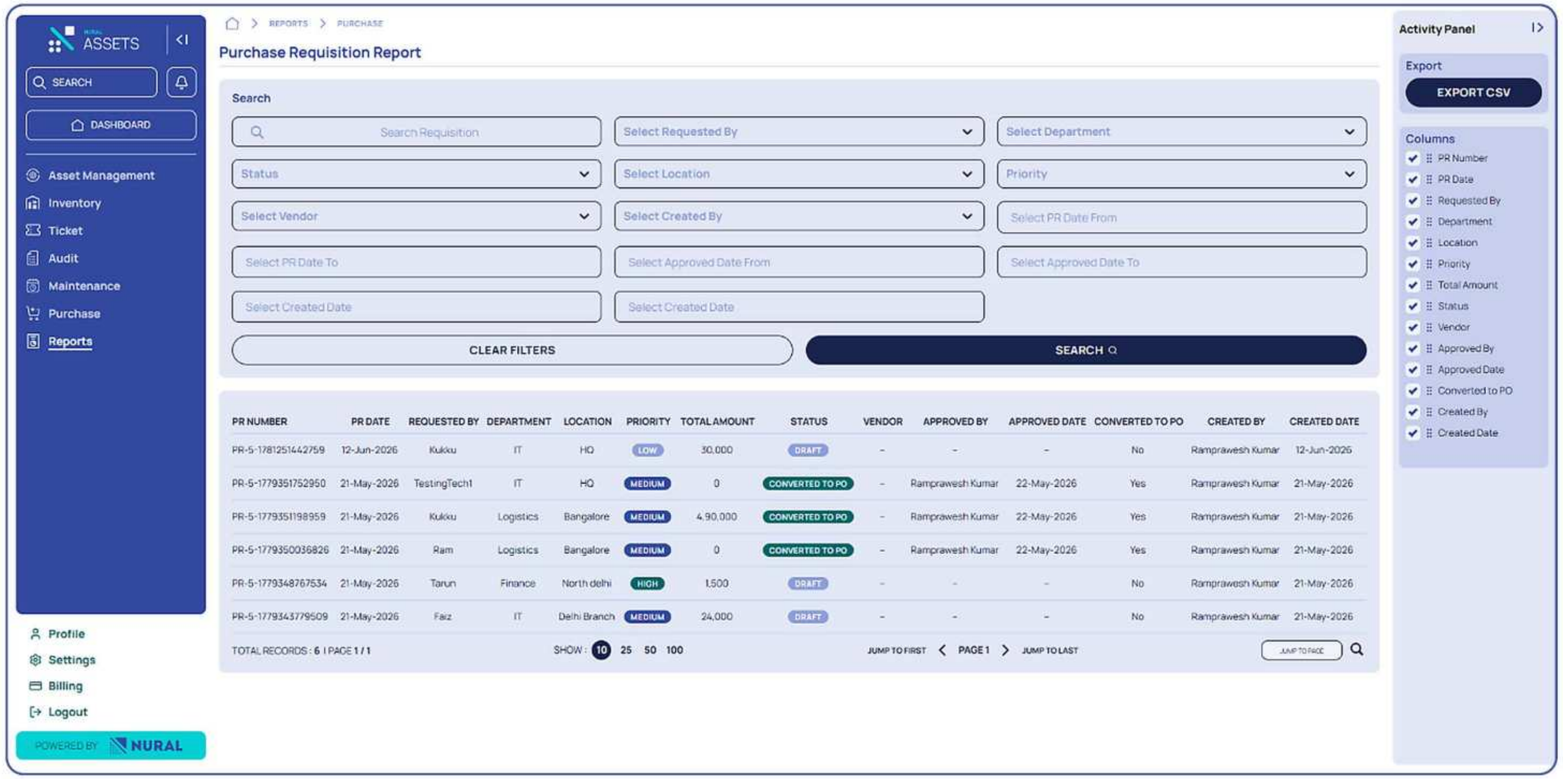


Figure 97 - Purchase Requisition Report

STEPS, CONTINUED

6. Under Search, use the Search Requisition box to look up a requisition, and narrow the report using the Select Requested By, Select Department, Status, Select Location, Priority, Select Vendor, and Select Created By dropdowns.

7. Use Select PR Date From and Select PR Date To to restrict the report to a requisition date range, Select Approved Date From and Select Approved Date To to restrict it to an approval date range, and the Select Created Date fields to restrict it to a creation date range.

8. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

9. In the Activity Panel, use the Columns options to show or hide columns (PR Number, PR Date, Requested By, Department, Location, Priority, Total Amount, Status, Vendor, Approved By, Approved Date, Converted to PO, Created By, Created Date), and click EXPORT CSV under Export to download the report.

10. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Pending PR / Approval Report

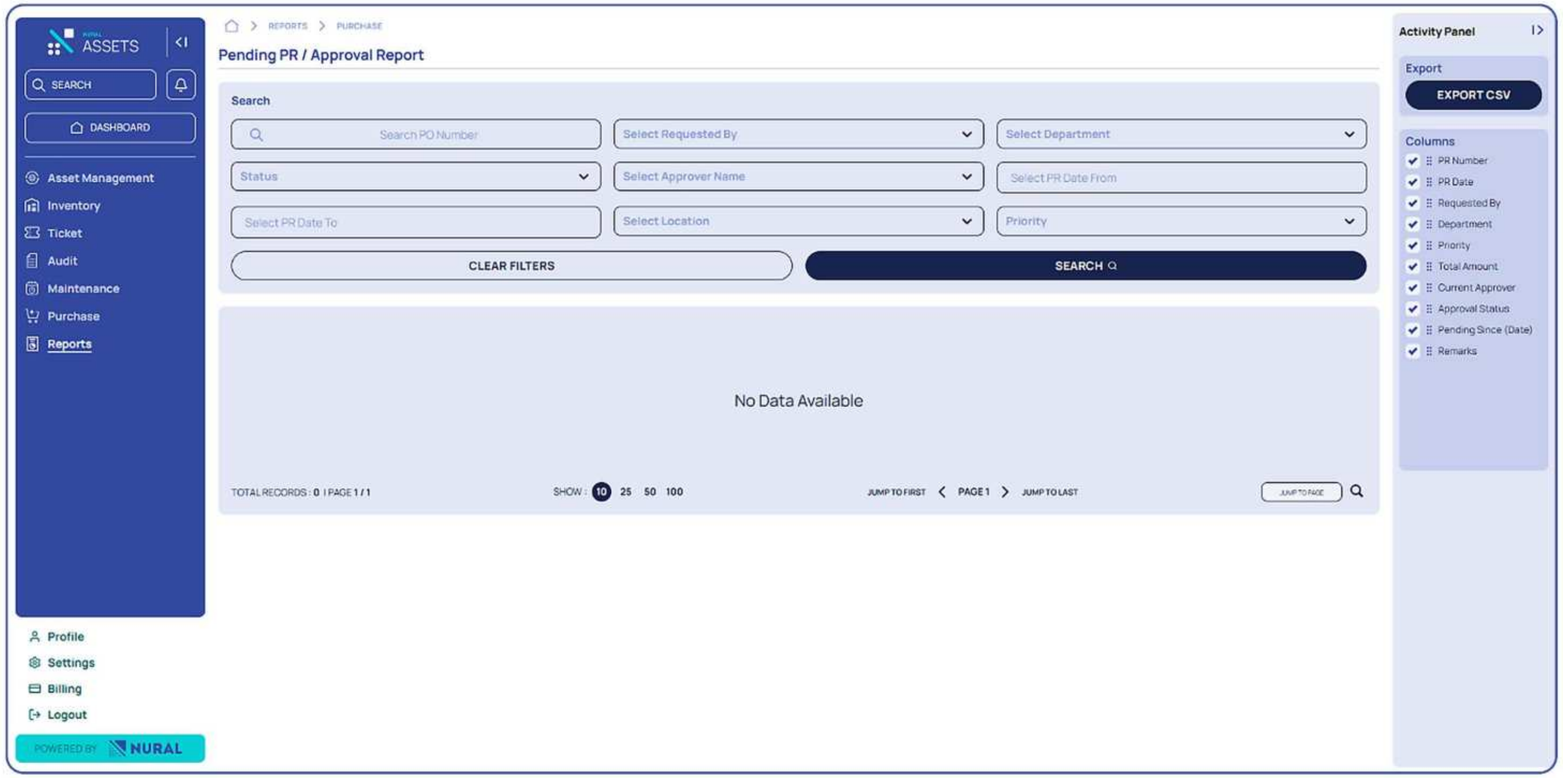


Figure 98 - Pending PR / Approval Report

STEPS

1. Go to: Reports, then open Pending PR / Approval Report under Purchase. The report lists purchase requisitions that are still awaiting approval, with their PR Number, PR Date, Requested By, Department, Priority, Total Amount, Current Approver, Approval Status, Pending Since (Date), and Remarks.

2. Current Approver is the person the requisition is sitting with at present, and Approval Status shows the stage it has reached in the approval workflow.

3. Pending Since (Date) is when the requisition arrived with the current approver, so it indicates how long the approval has been outstanding. Remarks carries any note the approver has recorded.

4. Because the report covers only requisitions awaiting action, an approved or rejected requisition drops out of the list. Use the Purchase Requisition Report if you need the full history.

5. Where no requisitions are awaiting approval, the table shows No Data Available and TOTAL RECORDS reads 0.

Pending PR / Approval Report

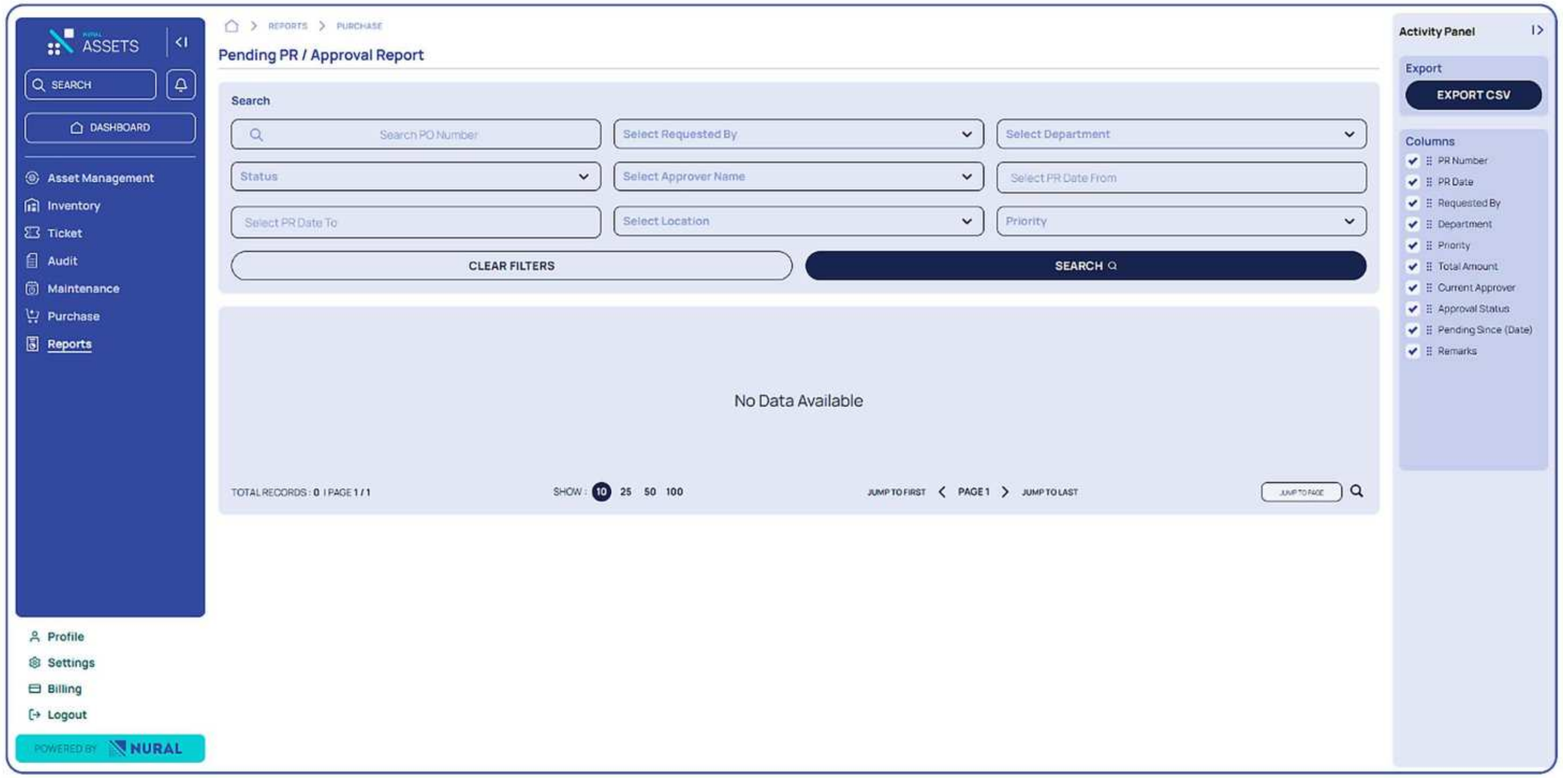


Figure 98 - Pending PR / Approval Report

STEPS, CONTINUED

6. Under Search, use the Search PO Number box to look up a record, and narrow the report using the Select Requested By, Select Department, Status, Select Approver Name, Select Location, and Priority dropdowns.

7. Use Select PR Date From and Select PR Date To to restrict the report to a requisition date range.

8. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

9. In the Activity Panel, use the Columns options to show or hide columns (PR Number, PR Date, Requested By, Department, Priority, Total Amount, Current Approver, Approval Status, Pending Since (Date), Remarks), and click EXPORT CSV under Export to download the report.

10. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Purchase Order Report

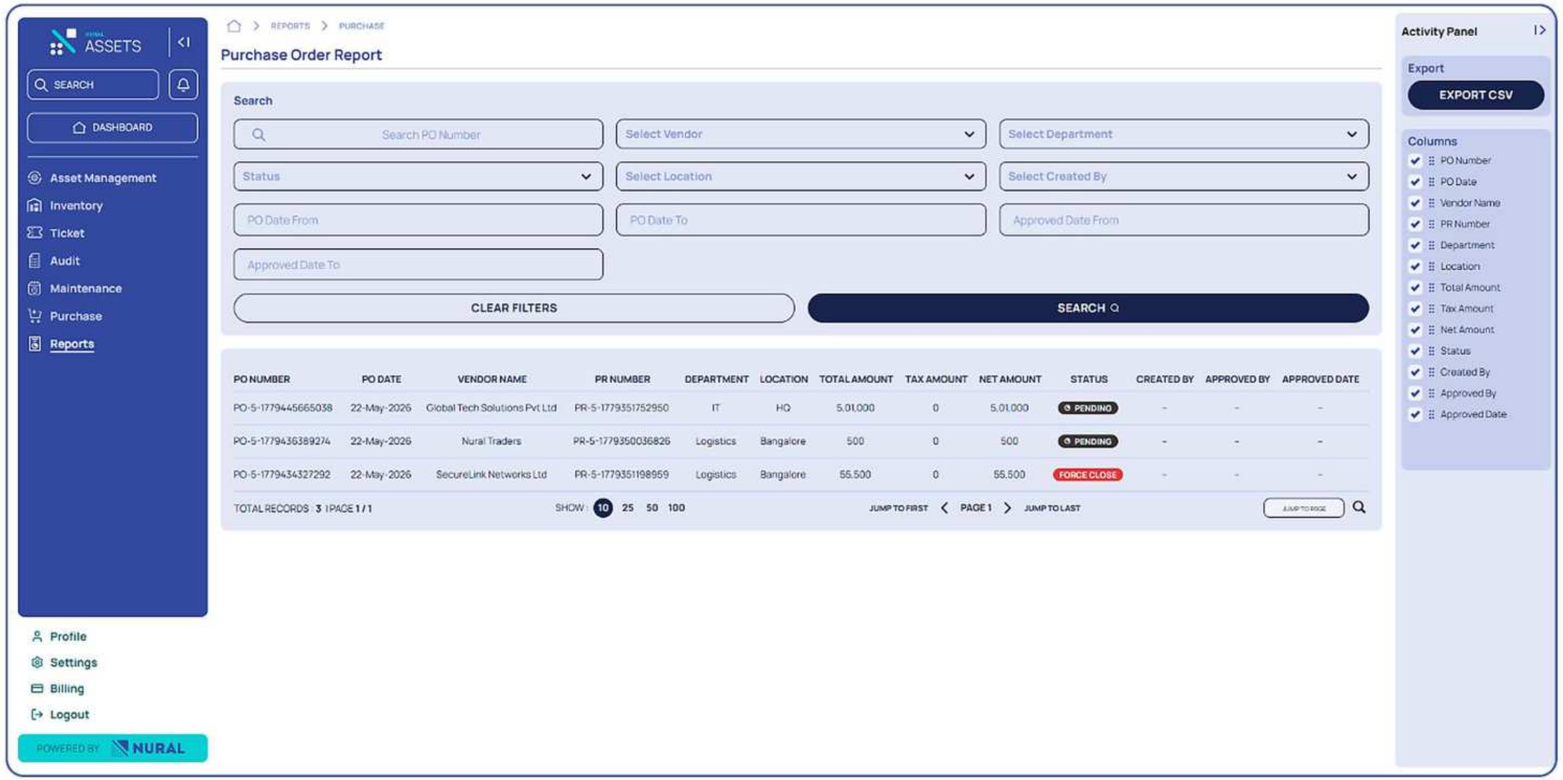


Figure 99 - Purchase Order Report

STEPS

1. Go to: Reports, then open Purchase Order Report under Purchase. The report lists every purchase order with its PO Number, PO Date, Vendor Name, PR Number, Department, Location, Total Amount, Tax Amount, Net Amount, Status, Created By, Approved By, and Approved Date.
2. PR Number shows the requisition the order was raised from, so you can trace a purchase order back to its originating purchase requisition.
3. Total Amount is the order value before tax, Tax Amount is the tax applied, and Net Amount is the payable total. Where no tax applies, Tax Amount reads 0 and Net Amount matches Total Amount.
4. Status shows where the order has reached - for example, Pending while it awaits approval, or Force Close where it has been closed without being fully received.
5. Where a value has not been recorded - such as Approved By or Approved Date for an order still Pending - the column shows a dash.

Purchase Order Report

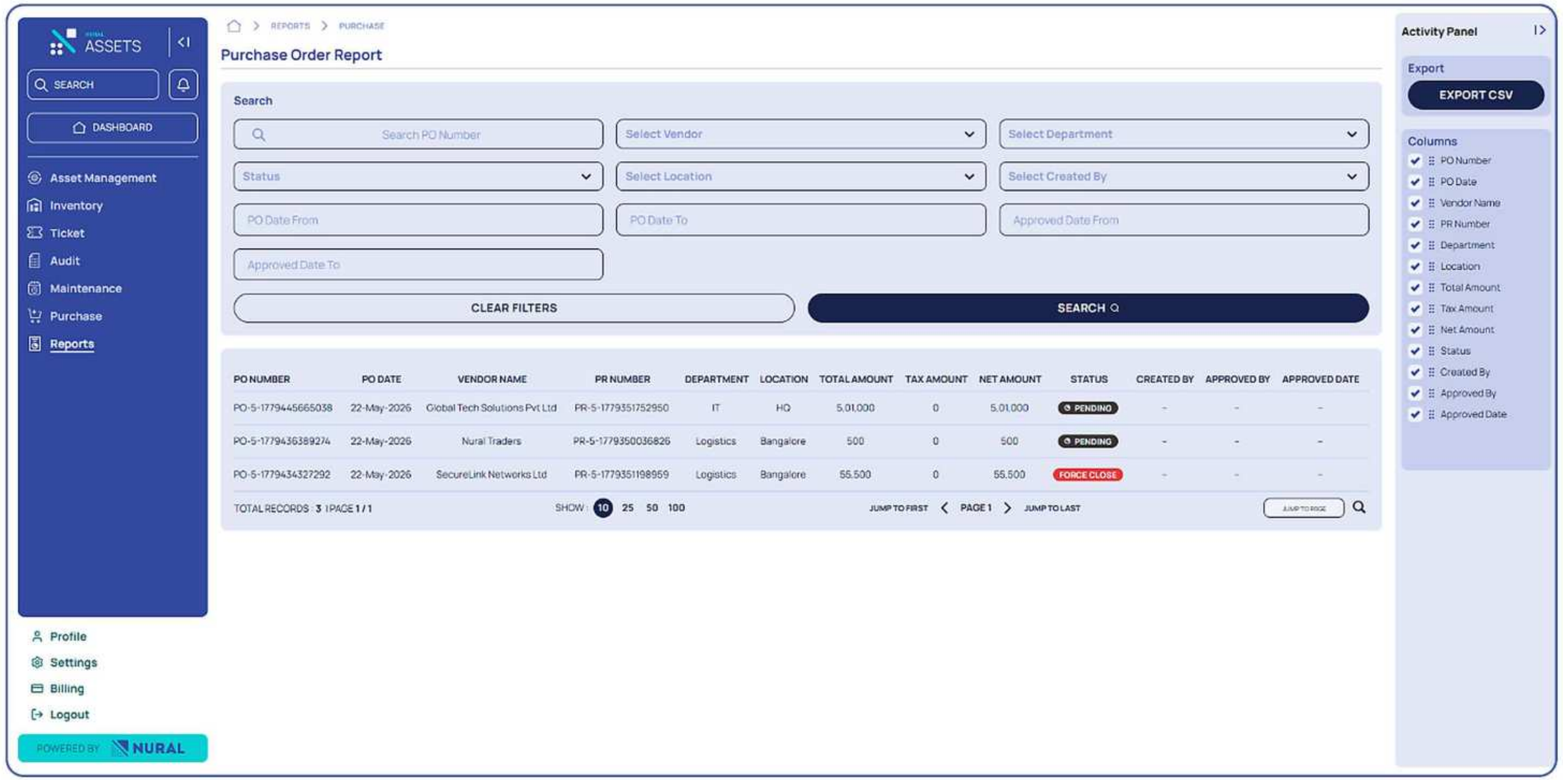


Figure 99 - Purchase Order Report

STEPS, CONTINUED

6. Under Search, use the Search PO Number box to look up an order, and narrow the report using the Select Vendor, Select Department, Status, Select Location, and Select Created By dropdowns.

7. Use PO Date From and PO Date To to restrict the report to an order date range, and Approved Date From and Approved Date To to restrict it to an approval date range.

8. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

9. In the Activity Panel, use the Columns options to show or hide columns (PO Number, PO Date, Vendor Name, PR Number, Department, Location, Total Amount, Tax Amount, Net Amount, Status, Created By, Approved By, Approved Date), and click EXPORT CSV under Export to download the report.

10. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Line Item PO Report

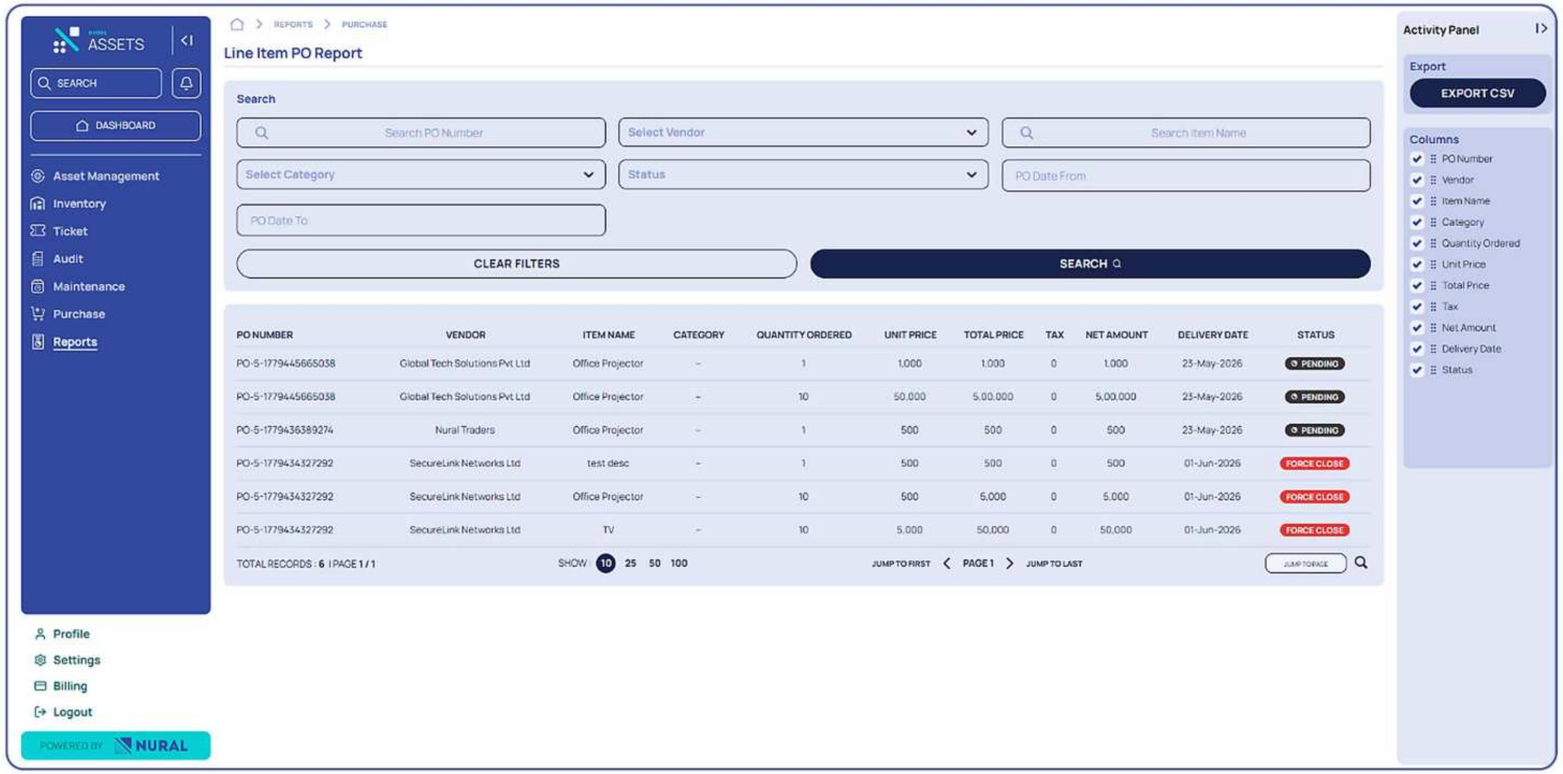


Figure 100 - Line Item PO Report

STEPS

1. Go to: Reports, then open Line Item PO Report under Purchase. The report breaks purchase orders down to the individual items ordered, with the PO Number, Vendor, Item Name, Category, Quantity Ordered, Unit Price, Total Price, Tax, Net Amount, Delivery Date, and Status.
2. Unlike the Purchase Order Report, this report shows one row for every line item, so the same PO Number repeats once for each item on that order. Use it when you need item-level detail rather than order totals.
3. Total Price is Quantity Ordered multiplied by Unit Price, and Net Amount is Total Price plus Tax. Where no tax applies, Tax reads 0 and Net Amount matches Total Price.
4. Delivery Date is the date the item is expected against that order, and Status reflects the state of the parent purchase order - for example, Pending or Force Close.
5. Where a value has not been recorded - such as Category for an item that has not been categorised - the column shows a dash.

Line Item PO Report

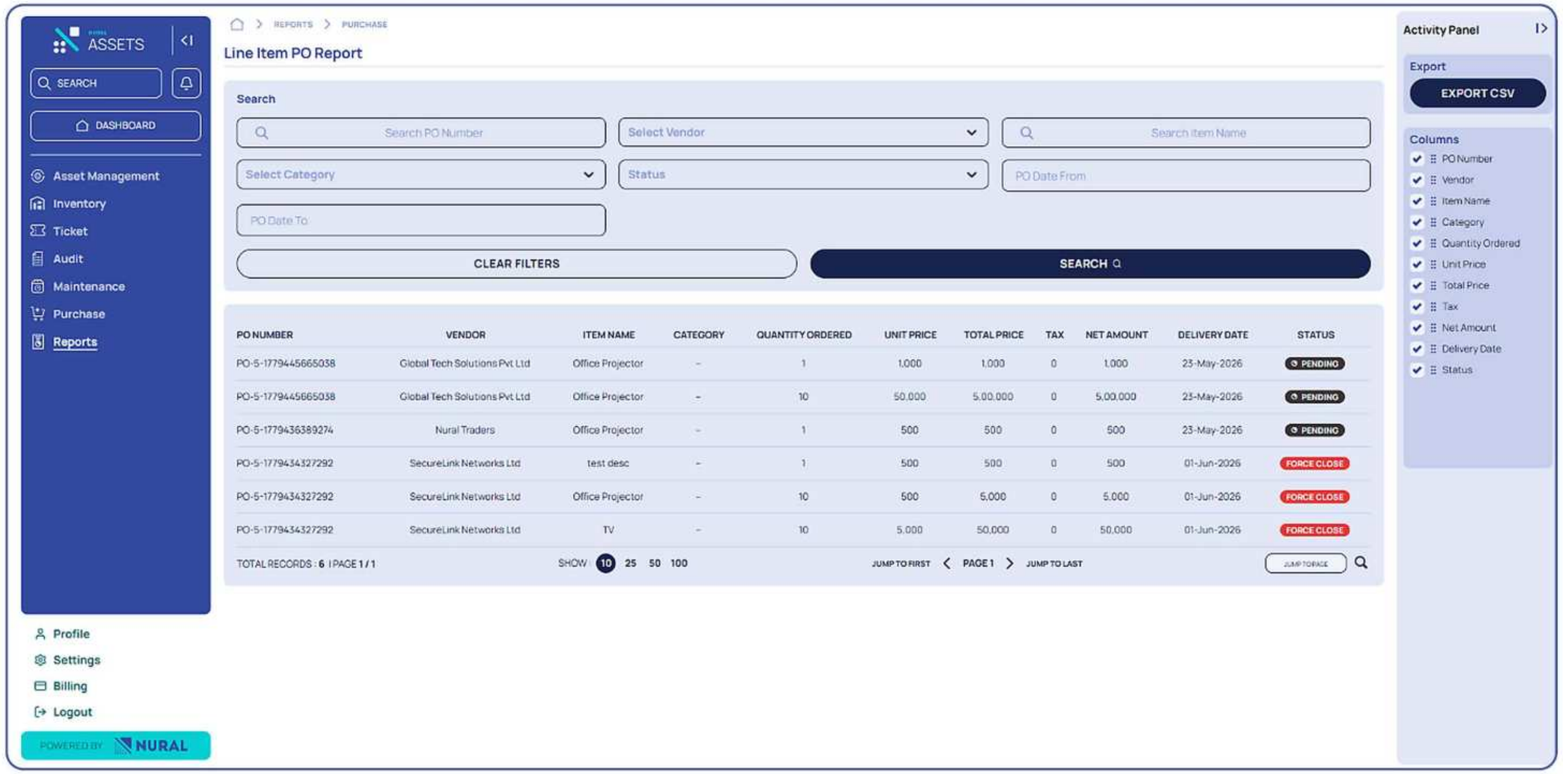


Figure 100 - Line Item PO Report

STEPS, CONTINUED

6. Under Search, use the Search PO Number box to look up an order and the Search Item Name box to look up an item, and narrow the report using the Select Vendor, Select Category, and Status dropdowns.

7. Use PO Date From and PO Date To to restrict the report to an order date range.

8. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

9. In the Activity Panel, use the Columns options to show or hide columns (PO Number, Vendor, Item Name, Category, Quantity Ordered, Unit Price, Total Price, Tax, Net Amount, Delivery Date, Status), and click EXPORT CSV under Export to download the report.

10. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS; note that this counts line items, not purchase orders.

GRN (Goods Receipt Note) Report

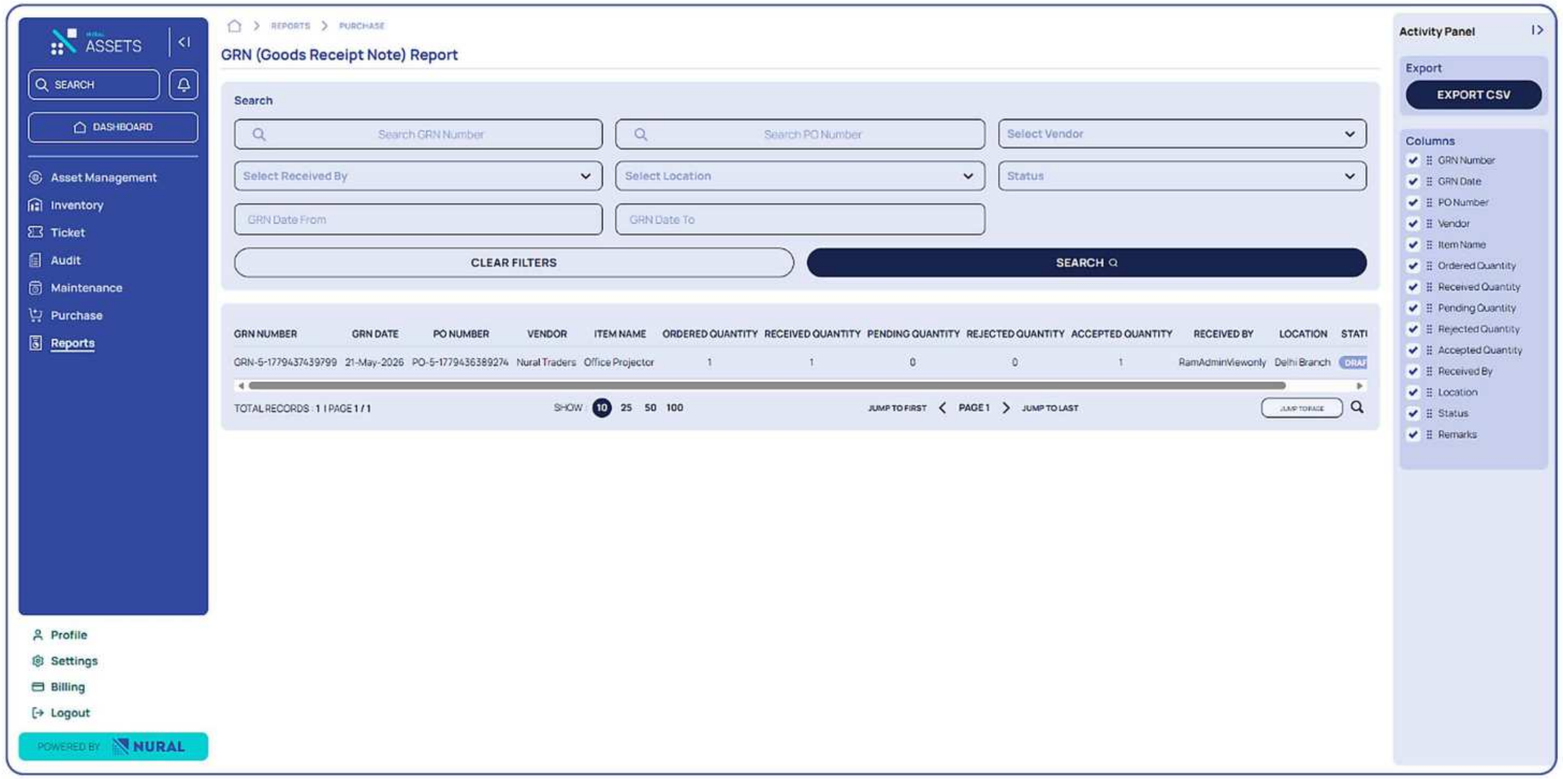


Figure 101 - GRN (Goods Receipt Note) Report

STEPS

1. Go to: Reports, then open GRN (Goods Receipt Note) Report under Purchase. The report lists what has actually been received against purchase orders, with the GRN Number, GRN Date, PO Number, Vendor, Item Name, Ordered Quantity, Received Quantity, Pending Quantity, Rejected Quantity, Accepted Quantity, Received By, Location, Status, and Remarks.
2. Each row is a single item on a goods receipt note, so a GRN covering several items appears once for each item, and PO Number links the receipt back to the order it was raised against.
3. Ordered Quantity is what the purchase order called for and Received Quantity is what arrived. Pending Quantity is the balance still to come, so a value above zero indicates a part delivery.
4. Of what arrived, Rejected Quantity is the amount turned away on inspection and Accepted Quantity is the amount taken into stock. Only the accepted quantity updates inventory.
5. Received By is the user who recorded the receipt and Location is where the goods were booked in. Status shows the stage of the note - for example, Draft while it is still being entered.
6. Where a value has not been recorded - such as Remarks where no note was added - the column shows a dash.

GRN (Goods Receipt Note) Report

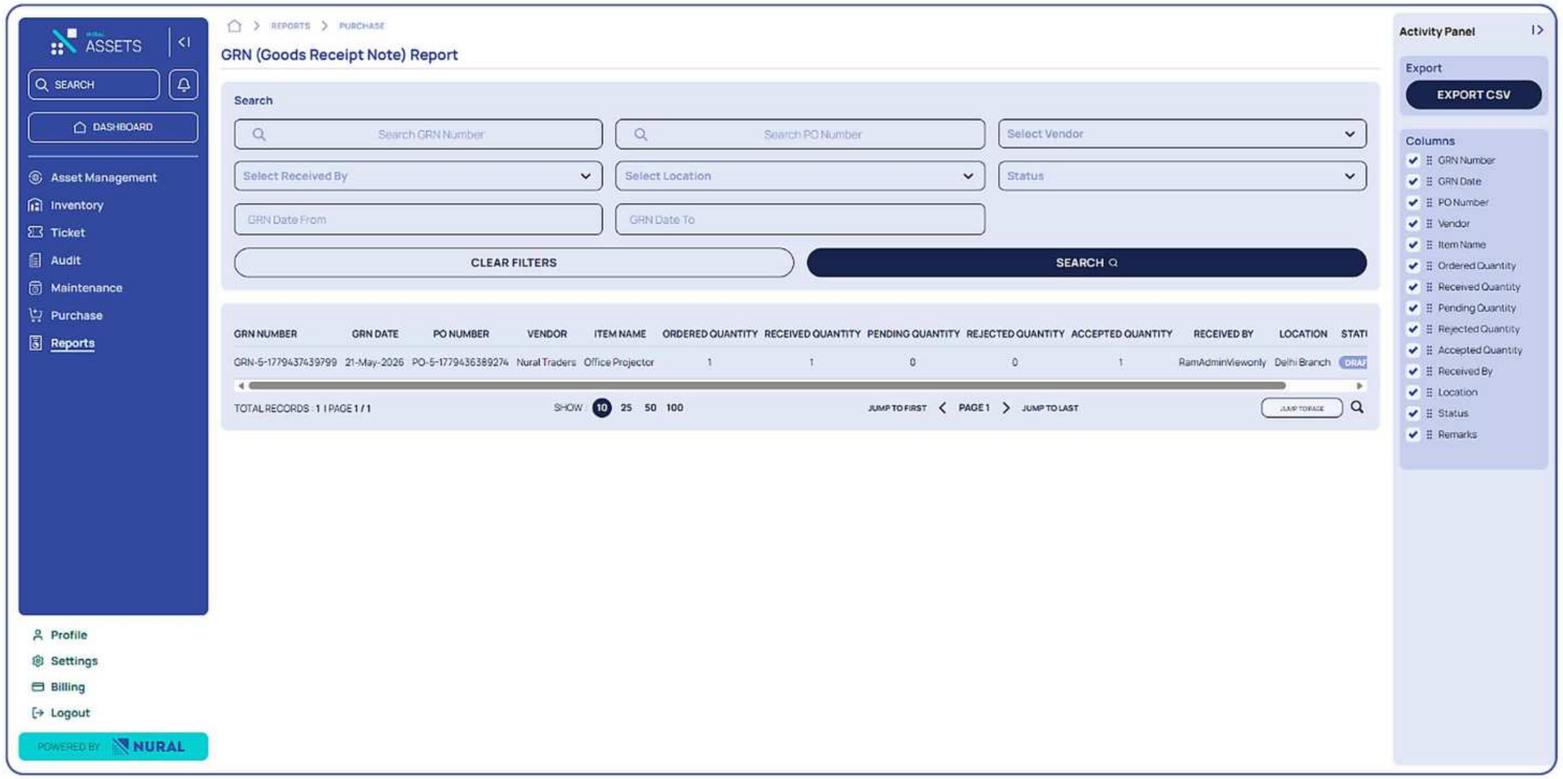


Figure 101 - GRN (Goods Receipt Note) Report

STEPS, CONTINUED

7. Under Search, use the Search GRN Number and Search PO Number boxes to look up a receipt or an order, and narrow the report using the Select Vendor, Select Received By, Select Location, and Status dropdowns.
8. Use GRN Date From and GRN Date To to restrict the report to a receipt date range.
9. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.
10. Use the horizontal scroll bar below the table to view the remaining columns.
11. In the Activity Panel, use the Columns options to show or hide columns (GRN Number, GRN Date, PO Number, Vendor, Item Name, Ordered Quantity, Received Quantity, Pending Quantity, Rejected Quantity, Accepted Quantity, Received By, Location, Status, Remarks), and click EXPORT CSV under Export to download the report.
12. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Depreciation Asset Register

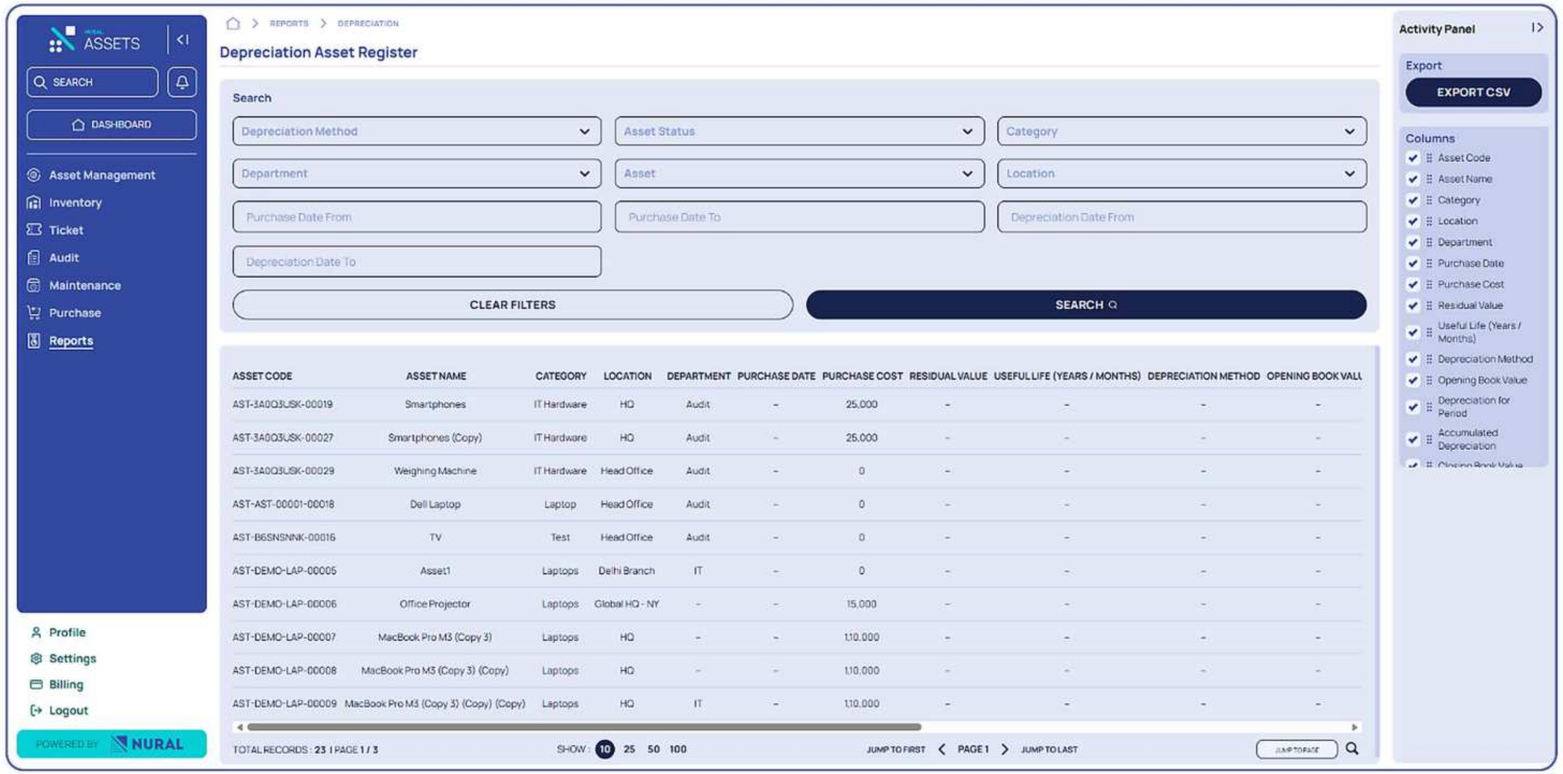


Figure 102 - Depreciation Asset Register

STEPS

1. Go to: Reports, then open Depreciation Asset Register under Depreciation. The register lists every asset with its Asset Code, Asset Name, Category, Location, Department, Purchase Date, Purchase Cost, Residual Value, Useful Life (Years / Months), Depreciation Method, Opening Book Value, Depreciation for Period, Accumulated Depreciation, and Closing Book Value.

2. Purchase Cost is the value the asset was brought onto the books at, and Residual Value is the value it is expected to retain at the end of its life. Depreciation is written down only to the residual value, never below it.

3. Useful Life (Years / Months) is the period over which the asset is written down, and Depreciation Method is the basis used to calculate the charge - the methods set up under Masters, Depreciation.

4. Opening Book Value is the asset's value at the start of the period, Depreciation for Period is the charge for that period, and Closing Book Value is the value carried forward, so Closing Book Value is Opening Book Value less Depreciation for Period.

5. Accumulated Depreciation is the total written off since the asset was purchased, so Purchase Cost less Accumulated Depreciation gives the current Closing Book Value.

6. The depreciation columns are only calculated once a depreciation method and useful life have been assigned to the asset. Until then, Residual Value, Useful Life, Depreciation Method, and the four value columns show a dash even where a Purchase Cost is recorded.

Depreciation Asset Register

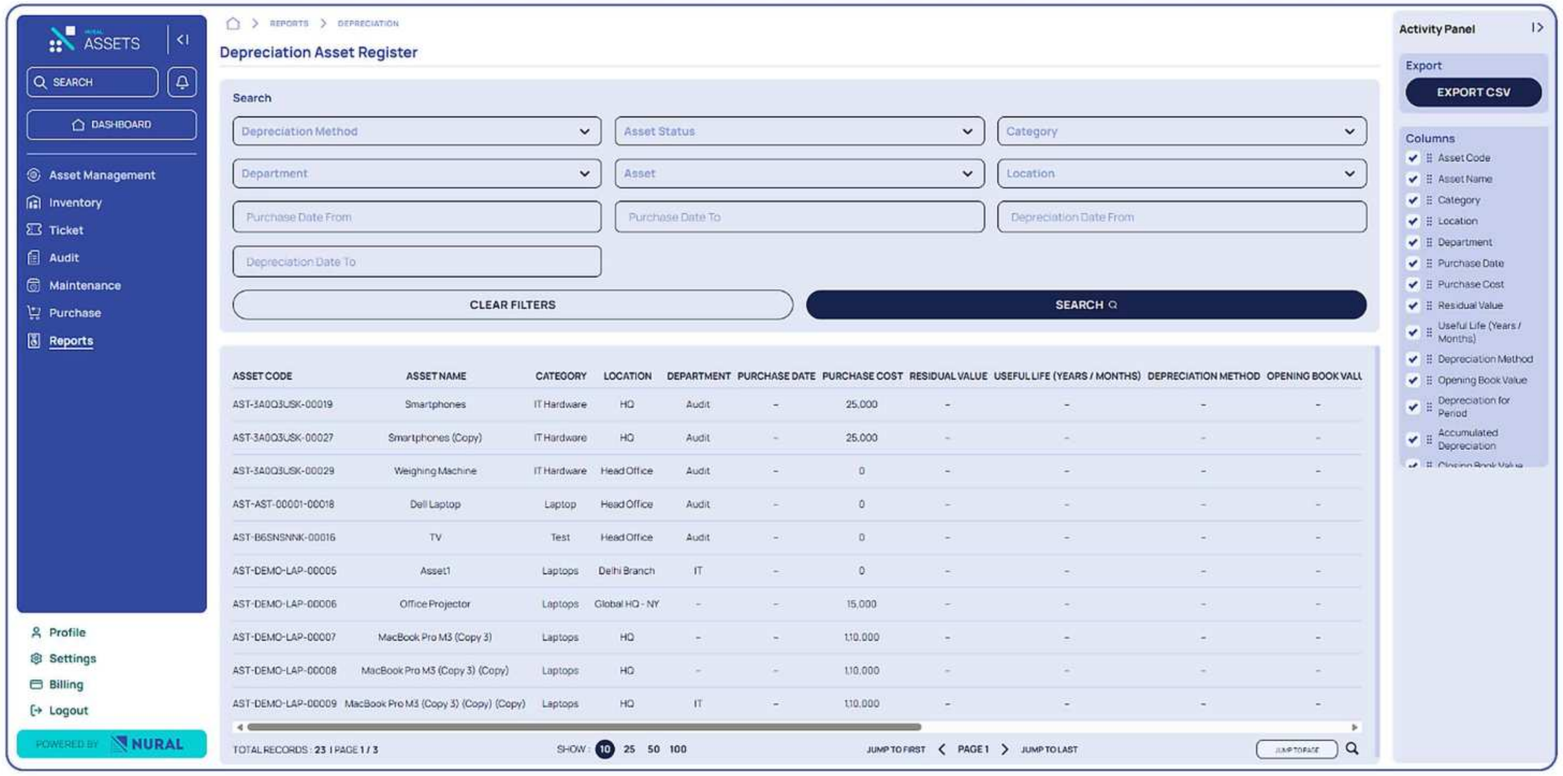


Figure 102 - Depreciation Asset Register

STEPS, CONTINUED

7. Under Search, narrow the register using the Depreciation Method, Asset Status, Category, Department, Asset, and Location dropdowns.

8. Use Purchase Date From and Purchase Date To to restrict the register to an acquisition date range, and Depreciation Date From and Depreciation Date To to restrict the depreciation figures to a period.

9. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.

10. Use the horizontal scroll bar below the table to view the remaining columns.

11. In the Activity Panel, use the Columns options to show or hide columns (Asset Code, Asset Name, Category, Location, Department, Purchase Date, Purchase Cost, Residual Value, Useful Life (Years / Months), Depreciation Method, Opening Book Value, Depreciation for Period, Accumulated Depreciation, Closing Book Value), and click EXPORT CSV under Export to download the register.

12. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Depreciation Period Report

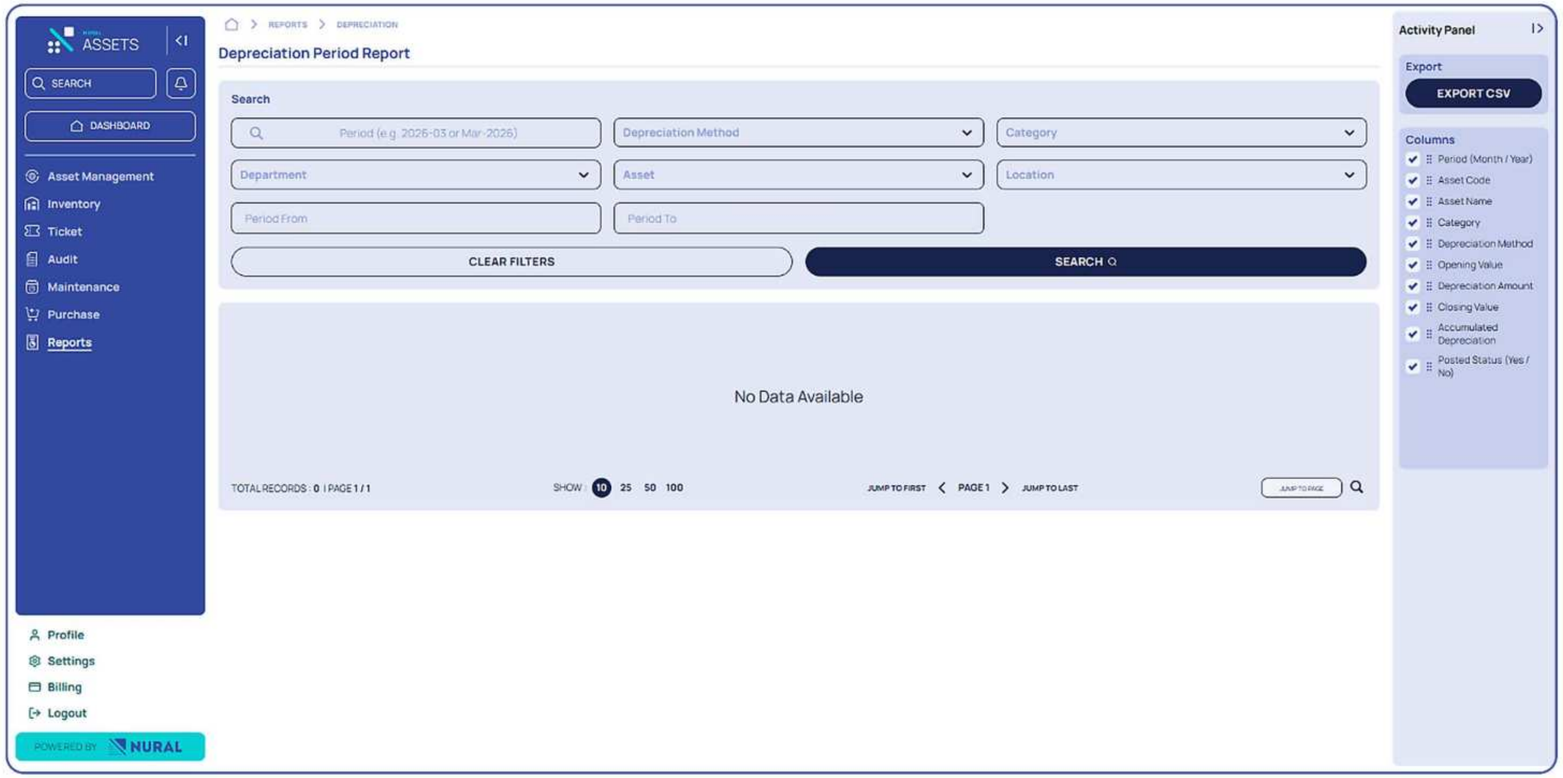


Figure 103 - Depreciation Period Report

STEPS

1. Go to: Reports, then open Depreciation Period Report under Depreciation. The report shows the depreciation charged in each accounting period, with the Period (Month / Year), Asset Code, Asset Name, Category, Depreciation Method, Opening Value, Depreciation Amount, Closing Value, Accumulated Depreciation, and Posted Status (Yes / No).
2. Each row is one asset in one period, so an asset appears once for every month it has been depreciated. Use this report for the period-by-period history and the Depreciation Asset Register for the current position of each asset.
3. Opening Value is the asset's value at the start of that period, Depreciation Amount is the charge for the period, and Closing Value is the value carried into the next period. Accumulated Depreciation is the running total written off up to and including that period.
4. Posted Status (Yes / No) shows whether the period's depreciation has been posted to the books. A row reading No is calculated but not yet posted.
5. Use the Period box to look up a single period, entered either as 2026-03 or as Mar-2026.
6. Under Search, narrow the report using the Depreciation Method, Category, Department, Asset, and Location dropdowns.

Depreciation Period Report

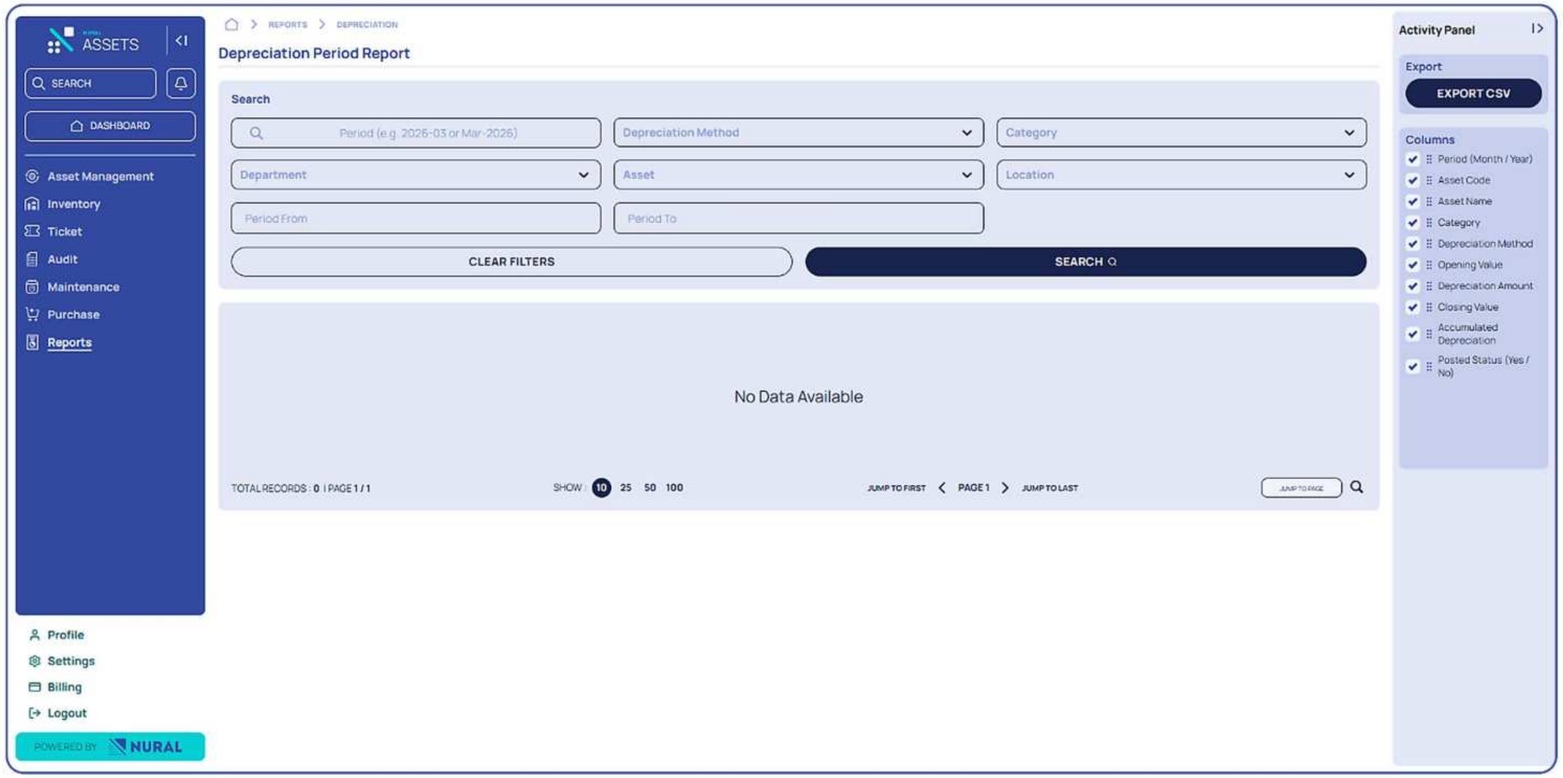


Figure 103 - Depreciation Period Report

STEPS, CONTINUED

7. Use Period From and Period To to restrict the report to a range of periods.
8. Click SEARCH to apply the filters, or click CLEAR FILTERS to reset them.
9. Where no depreciation has been run for the selected filters, the table shows No Data Available and TOTAL RECORDS reads 0.
10. In the Activity Panel, use the Columns options to show or hide columns (Period (Month / Year), Asset Code, Asset Name, Category, Depreciation Method, Opening Value, Depreciation Amount, Closing Value, Accumulated Depreciation, Posted Status (Yes / No)), and click EXPORT CSV under Export to download the report.
11. Use the pagination controls at the bottom to set records per page (10/25/50/100) and navigate pages, or use Jump to First, Jump to Last, or Jump to Page. The total number of records and pages is shown as TOTAL RECORDS.

Account

Manage your own profile, and your organisation's plan, add-ons and billing.

Profile

Billing

Profile



Figure 104 - Profile

STEPS

1. Go to: Profile from the bottom of the left navigation. The page shows your own account across four panels - your profile picture and role, Account Information, Personal Information, and Account Security.
2. The top-left panel shows your profile picture with your email address and role beneath it. Click the pencil icon on the picture to upload or replace your photograph.
3. Account Information is read-only and shows your User ID, Account Created date and time, Last Login date and time, and Status. A Status of Active means the account can sign in; a deactivated account cannot.
4. Personal Information shows your Full Name, Email Address, Phone Number, Department, Location, and Role. Click EDIT to update these details.
5. Role is marked cannot be changed - you cannot alter your own role from this page. Role changes are made by an administrator under People, View/Edit Users, or by reassigning the role under Roles & Permissions.
6. Under Account Security, click CHANGE PASSWORD to set a new password for your account.
7. Use Last Login under Account Information to confirm your most recent sign-in. If it shows a time you do not recognise, change your password and report it, and check Login Activity for the full sign-in history.

Billing

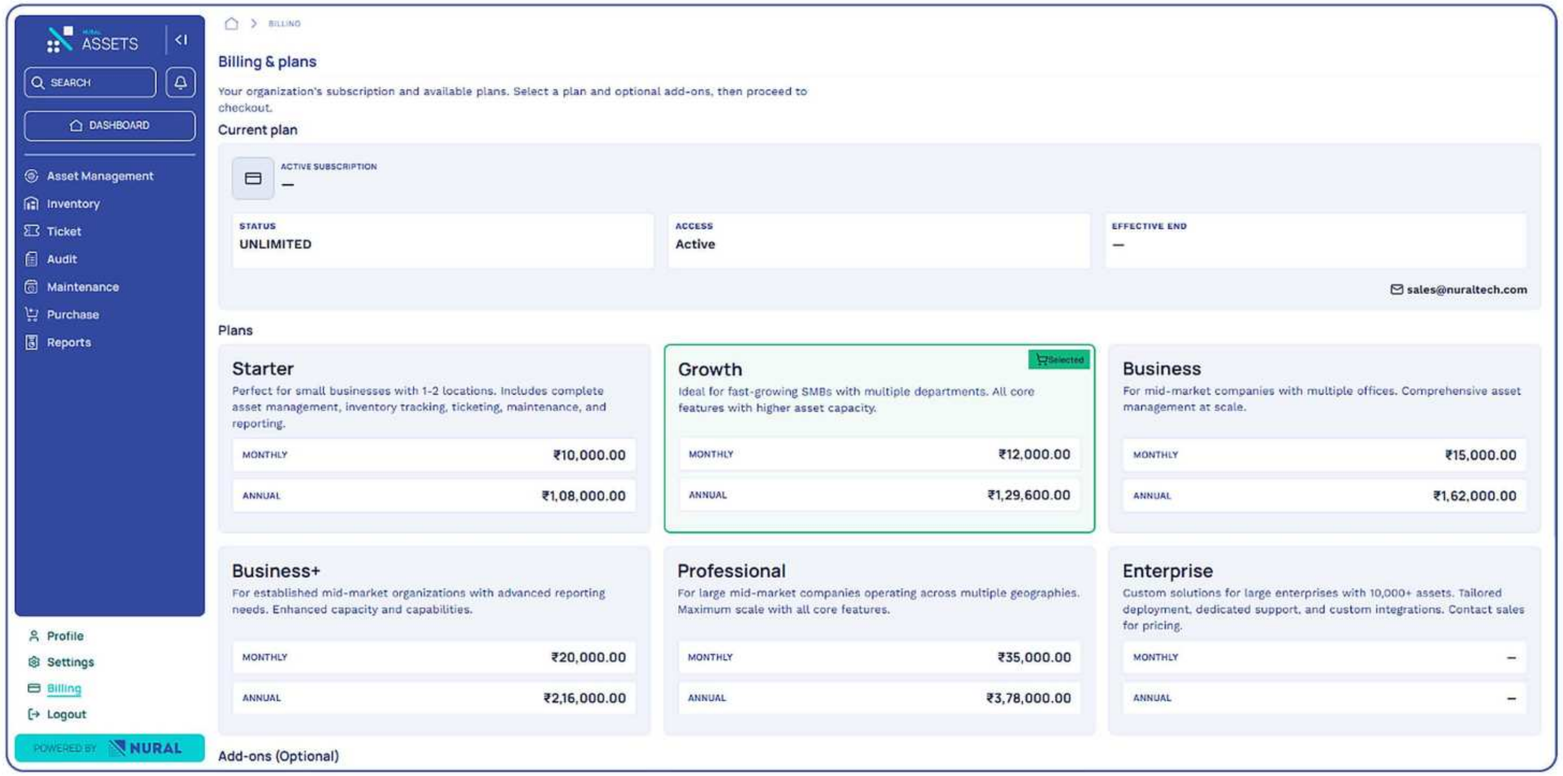


Figure 105 - Billing & plans: current plan and plans

STEPS

1. Go to: Billing from the bottom of the left navigation. The Billing & plans page shows your organisation's current subscription, the plans available to you, optional add-ons, and a checkout action.

2. Under Current plan, Active Subscription is the plan in force, Status is the entitlement level granted, Access shows whether the subscription is currently Active, and Effective End is the date on which access lapses. Where a value does not apply - for example on an unlimited subscription with no end date - the field shows a dash.

3. The address shown in the Current plan panel, sales@nuraltech.com, is the contact for any query on your subscription.

4. Under Plans, each plan card gives a short description of the organisation it suits, followed by its Monthly and Annual price. Starter is ₹10,000.00 monthly or ₹1,08,000.00 annually, Growth ₹12,000.00 or ₹1,29,600.00, Business ₹15,000.00 or ₹1,62,000.00, Business+ ₹20,000.00 or ₹2,16,000.00, and Professional ₹35,000.00 or ₹3,78,000.00.

Billing

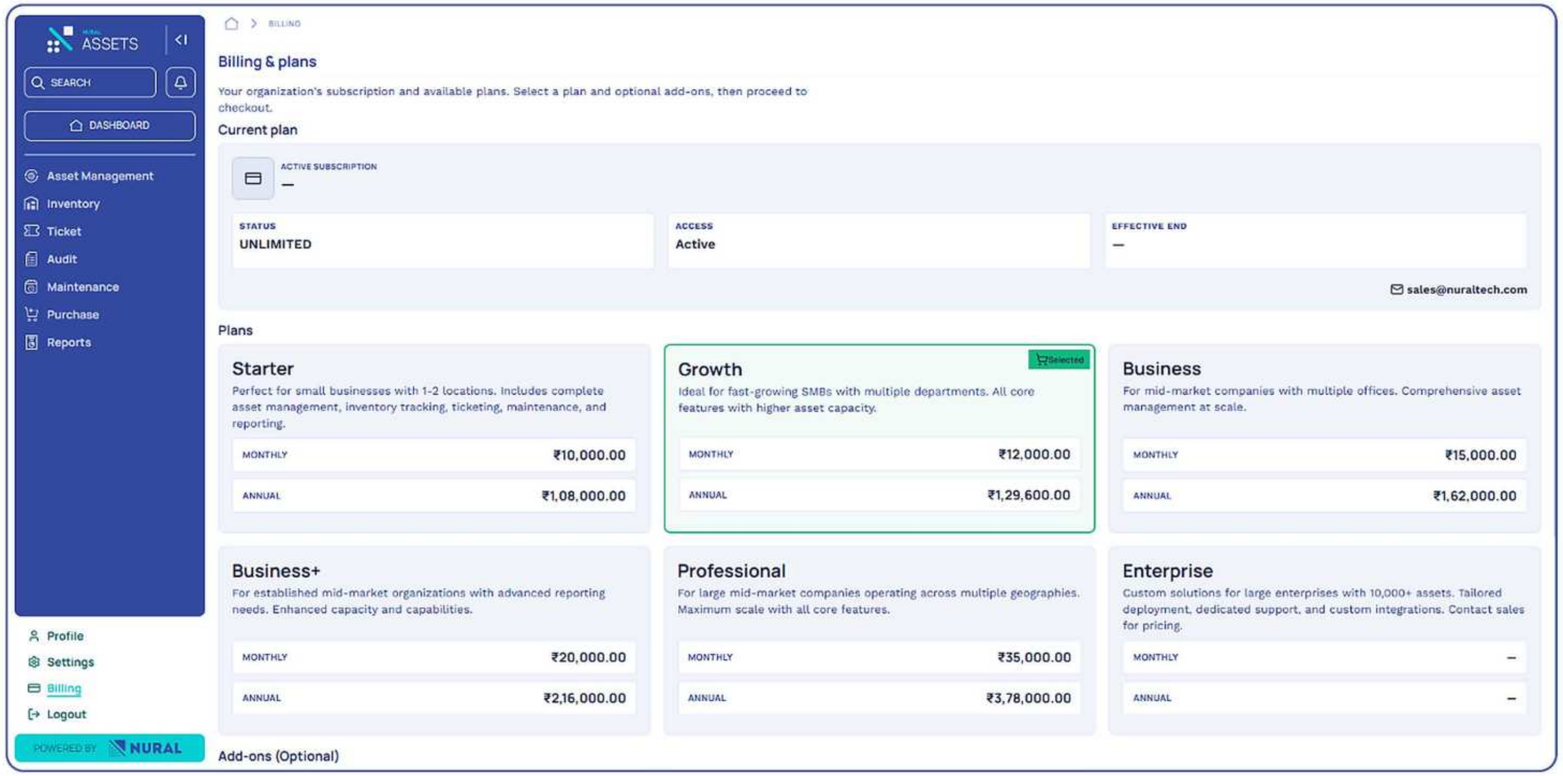


Figure 105 - Billing & plans: current plan and plans

STEPS, CONTINUED

5. The plans step up by scale: Starter suits small businesses with one or two locations, Growth fast-growing SMBs with multiple departments, Business and Business+ mid-market organisations with multiple offices and advanced reporting needs, and Professional large mid-market companies operating across multiple geographies.

6. Enterprise shows a dash in place of both prices. It covers organisations with 10,000 or more assets and includes tailored deployment, dedicated support, and custom integrations, so pricing is quoted by the sales team rather than listed.

7. A plan carrying the Selected tag is the one currently chosen on this page - in the example, Growth. Selecting a card marks it for checkout; it does not change your subscription until you complete the checkout.

8. Across the five listed plans the annual price is 10.8 times the monthly price, so paying annually costs the equivalent of 10.8 months rather than 12 - a saving of about 10 per cent against paying monthly.

Billing

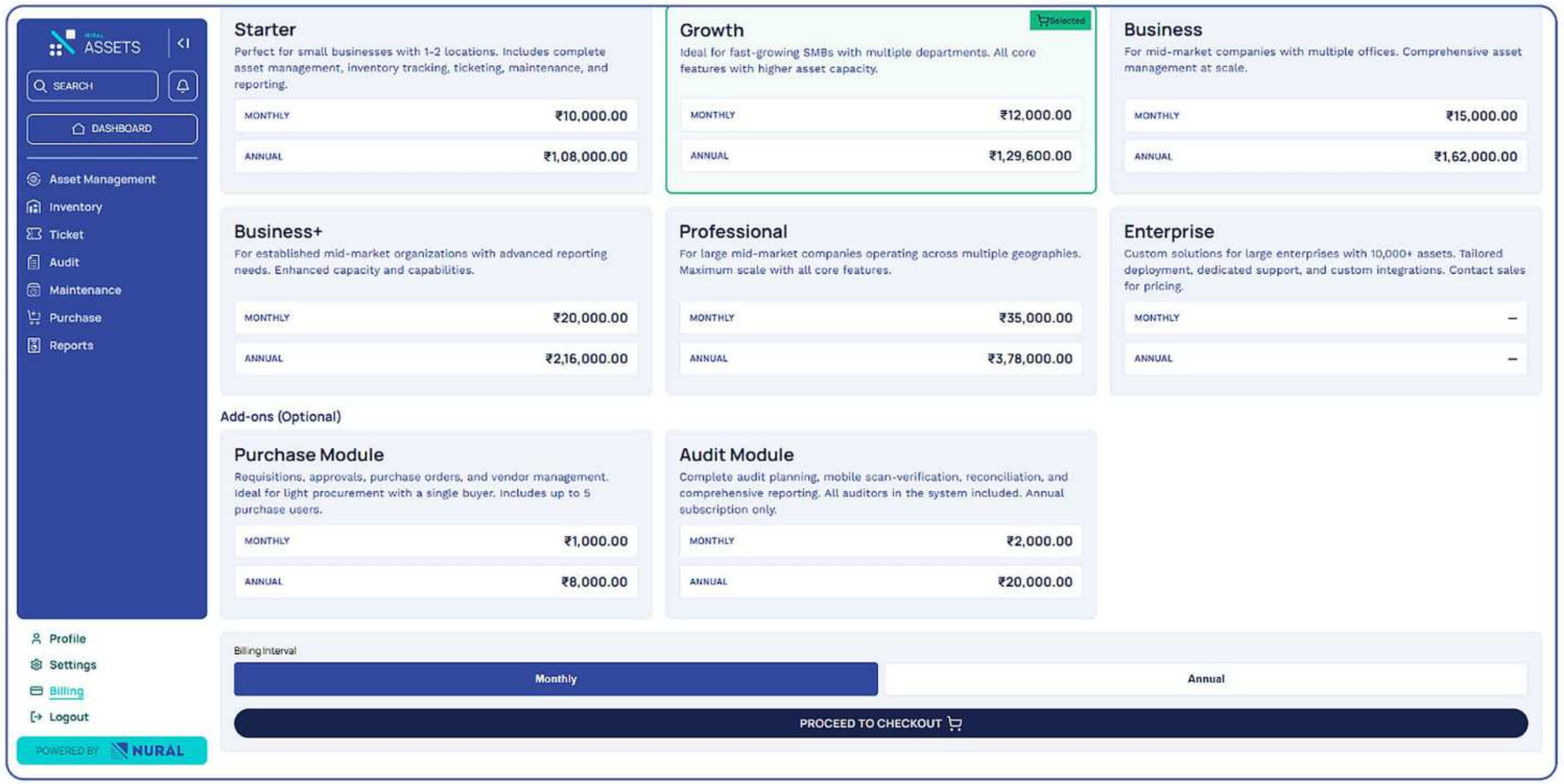


Figure 106 - Billing & plans: add-ons, billing interval and checkout

STEPS

1. Under Add-ons (Optional), the Purchase Module covers requisitions, approvals, purchase orders, and vendor management. It suits light procurement with a single buyer and includes up to 5 purchase users, at ₹1,000.00 monthly or ₹8,000.00 annually.
2. The Audit Module covers audit planning, mobile scan-verification, reconciliation, and comprehensive reporting, with all auditors in the system included, at ₹2,000.00 monthly or ₹20,000.00 annually. The card notes that this add-on is available on annual subscription only.
3. Add-ons are optional and priced separately from the plan, so the modules you select here are added to the plan price at checkout.
4. Use the Billing Interval control at the foot of the page to switch between Monthly and Annual. This setting determines which of the two prices shown on each plan and add-on card is charged.
5. Click PROCEED TO CHECKOUT to confirm the selected plan, add-ons, and billing interval, and complete payment. Your subscription is not changed until checkout is completed.

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NEED HELP

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