RES 19.3.1 — Order-to-Cash Workflow Setup Manual (DYNICS import)

Nov 20, 2026 · @sandeep bhujbal

Classification: Internal · Rudaya Powers Pvt. Ltd. (RPPL) · Rudaya Enterprise Suite (RES)

This manual sets up and runs the 18-step import order-to-cash flow, from customer enquiry to closure, for products bought from DYNICS and resold in India. It covers one-time configuration (Part A) and the daily steps (Parts B to E).

Item	Detail
Product version	RES 19.3.1 (release approved by the Sponsor on 21 Nov 2026)
Build covered	Built and checked on screen on build 5b85f5f3 (21 Nov 2026). The release build (a5df53c1) adds layout fixes on the Order Tracking and manual RFQ screens and prints whole-number quantities on the Standard Quote and Standard Invoice
Status of this manual	Checked. All 18 steps were run end to end on screen on 21 Nov 2026 with sample customer Zenith Demo Automation: first by hand (QT-2026-00006 → SO-000003 → INV/2026-27/00003), then for the recorded videos on build 5b85f5f3 (QT-2026-00008 → SO-000005 → INV/2026-27/00005). Both orders were closed. Button and field names below are as they appear on screen.
Audience	Sales, sales managers, purchasing, logistics, finance, service (warranty) and the RES administrator
Owner	RPPL

Workflow overview

Every step happens on one of five RES screens: the RFQ screens (steps 1–4), the Quotation Center (5–8), Finance > Procurement (10), Order Tracking (9–18) and Finance > Invoices (16–17). The quotation number ties steps 1–8 together; from step 8 the Sales Order number (SO-000001) ties everything together.

#	Step	Who does it	RES screen	Result recorded
1	Enquiry	Sales	Sales > Inbox email review (email) or Sales	Enquiry captured from email or

#	Step	Who does it	RES screen	Result recorded
			> Manual RFQ Opportunities (phone, visit, WhatsApp)	entered by hand
2	CRM opportunity	Sales	Sales > RFQ Opportunities / CRM Leads	Lead at Qualified, then Proposal
3	Product identification	Sales	RFQ Opportunities > match	Each RFQ line matched to a catalogue product by part number or technical specification
4	DYNICS price selection	Sales	Product Catalog prices, pulled into the draft quotation	DYNICS cost and selling price per line
5	Import costing	Sales	Quotation Center > Costing and FX assessment	Landed cost, freight, duty %, FX scenario, margin
6	Customer quotation	Sales	Quotation Center	Quotation PDF, emailed to the customer
7	Quotation approval	Sales manager	Quotation Center > Approve	Approved quotation; approvers alerted by email
8	Customer PO / WO	Sales manager	Quotation Center > Customer PO / Work order received	Customer PO or WO on a new Sales Order; quotation marked Won
9	Sales order	(automatic)	Sales > Order Tracking	Open Sales Order with the customer order details and documents
10	DYNICS purchase order	Purchasing	Finance > Receivables, Procurement tab	Requisition, PO and PO approval against the Sales Order line
11	Supplier confirmation	Purchasing	Order Tracking > Shipment	DYNICS acknowledgement number and confirmed ETA
12	Shipment preparation	Purchasing / logistics	Order Tracking > Shipment	Packages, weight, packing list with serial numbers
13	International shipping	Logistics	Order Tracking > Shipment	Mode, forwarder, AWB / BL, ETD / ETA, tracking link
14	Customs	Logistics	Order Tracking >	Bill of entry, duty paid, IGST

#	Step	Who does it	RES screen	Result recorded
	clearance		Shipment	credit, clearance date
15	Customer delivery	Logistics	Order Tracking > Shipment	Received date, delivered date, delivery challan / POD
16	Customer invoice	Finance	Finance > Invoices > Load quotation	GST invoice issued from the Sales Order
17	Payment collection	Finance	Finance > Invoices > Save payment	Payment against the invoice
18	Closure	Sales manager / service	Order Tracking > Warranty and Closure	Warranty assets per serial number; Sales Order closed

If the customer has not decided after step 7, put the quotation **On hold** with a review date (see step 7); RES emails the owner on that date.

Part A — One-time setup (administrator)

Do A1 to A9 once, in order, signed in as an administrator. Nothing in the daily flow works well until A1, A2, A4 and A5 are done.

A1. Users, roles and permissions

1. Open **Administration > Users & roles**.
2. Create one user per person with their own company email address. Alerts go to that address.
3. Give each user the role that matches the work. The permissions the flow needs:

Work	Permissions needed	Typical role
Read enquiries, prepare quotations	crm.read, crm.manage, crm.email_intake, quotation.read, quotation.manage, product.read	sales_engineer
Approve quotations, record customer PO, close orders	quotation.approve, quotation.close	sales_manager, admin
Raise DYNICS POs, edit shipments	procurement.read, procurement.prepare, procurement.receive	purchasing role: granted by a super administrator (see 6 below)
Approve DYNICS POs	procurement.approve	purchasing head
Invoices and payments	invoice.read, invoice.create, invoice.issue, invoice.payment.record	finance

Work	Permissions needed	Typical role
Warranty assets	asset.read, asset.manage	service
Review exchange rates	exchange-rates.review	finance head

4. Set each approver's **organisational level** if your approval policy uses levels. An approver below the configured minimum cannot approve and is not alerted.
5. Maker-checker is always on: the person who creates or submits an item never approves it. Make sure every approval type has at least two people.
6. **Purchasing permissions are not on any role by default.** A super administrator (Sandeepb) grants procurement.read, procurement.prepare and procurement.receive to the purchasing role, and procurement.approve to the role of whoever approves DYNICS POs, under **Users & roles > role permissions**. Each grant needs a reason, and a super administrator cannot grant to a role they hold themselves. Without these, nobody can raise a DYNICS PO or record shipments.

- When someone leaves, a super administrator opens Users & roles and clicks **Remove user** on their row. Choose a successor to pass on their roles, selected individual permissions and follow-ups for their open quotations, orders, shipments and approvals. The account is switched off for good and its licence seat is freed; every record it created or approved keeps its name. Only an account that never signed in can be deleted permanently.

A2. Company email (for alerts)

1. Open **Administration > Settings > Email**.
2. Choose Microsoft 365 (Graph) or SMTP, enter the sender mailbox and save. RPPL uses Microsoft 365.
3. Run **Configuration verification** and confirm email passes.

Without a saved email account, approval, hold, acknowledgement and ETA alerts stay off. Nothing else is affected.

A3. Inbox reading (for step 1)

1. Open **Settings > Mailboxes** and **Settings > Microsoft Graph**, and connect the sales mailbox.
2. Optional: approve the AI reading of RFQ emails (Azure OpenAI) under the RFQ approval settings.

A4. Exchange rates (for steps 4, 5 and 10)

1. Open **Finance > Exchange Rates**.
2. Enter the USD to INR rate with its source (for example RBI) and effective dates.
3. A second person with exchange-rate review rights approves it. Only approved rates are used in quotations and costing.
4. Renew it before it expires. The current approved USD to INR rate (95.60, RBI) ends on 22 Nov 2026.

A5. DYNICS as a supplier, and the product catalogue (for steps 3 to 5)

- Open **Finance > Vendors**, click **New vendor** and enter the legal name (for example DYNICS Inc), trade name DYNICS, type **Overseas**, tax classification **Overseas** and initial status **Active**. Click **Save record**. Add the address and contacts under the vendor.
- Open **Sales > Product Catalog**. For every DYNICS product enter:
    - Part number exactly as DYNICS writes it, for example EW24D12I7-G-P21-FRD. It prints as the SKU on the Standard Quote and Standard Invoice.
    - Description and technical specification (screen size, CPU, memory, ports). RES matches customer emails on these when no part number is quoted.
    - Distributor cost in USD (the DYNICS price to RPPL).
    - OEM / list price and the selling price if fixed.
    - HSN code and GST rate.
    - Box dimensions and weight (used by the freight calculator).
- Turn on stock tracking for every DYNICS product, and create one stock location (for example PUNE-WH, Pune warehouse). Procurement only offers products that are stock-tracked. Do it in **Manufacturing > Production > Shared Inventory** (Stock locations, then Stock products > Enable stock tracking) or in **Distribution & Trading > Inventory**.
- Optional: put customer-specific selling prices in a price list under **Pricing > Price Lists & Policy**; a second person approves it.

A6. Freight and FX (for step 5)

1. Open **Pricing > Freight Calculator**. Set up freight rules, forwarder rate cards, pallet types and packaging rules for air and sea.
2. Set the FX advisory defaults (bank forward curve or buffer percent).

A7. Quotation templates and numbering

- **Settings > Quotation templates** and **Settings > Invoice templates**: copy the built-in **Standard Quote** and **Standard Invoice** samples (company block and logo, quote / invoice box, Bill To / Ship To, SKU / Description / Qty / Price / Total, terms beside the totals) and put in RPPL's own terms and declaration.
- **Settings > Company**: fill in phone, email and website; they print under the company address. PAN is taken from the GSTIN. Upload the logo under **Settings > Branding**.
- **Settings > Quotation numbering**: confirm the series (QT-2026-00001).
- **Settings > Commercial**: default payment terms and validity days.

A8. Warranty on quotation lines (for step 18)

RES creates warranty records only for quotation lines marked for it. On each hardware line of a quotation, tick **Generate asset record**, set the **asset type** and **warranty months** (for example 12 or 36). Tell sales to do this every time; it cannot be added after the invoice is issued.

The Installed Base & CMDB module must be licensed (Assets menu visible).

A9. Procurement approval policy (for step 10)

- At least **two people** need procurement.approve, and neither should be the person who raises POs. Today the Sales Manager role holds it.
- One of them opens **Finance > Receivables**, the **Procurement** tab, then **Approval policy**, enters the validity dates, the request expiry in minutes and a reason, and clicks **Propose policy for independent approval**.
- The other approves it with **Approve policy independently**. Until a policy is approved and in force, purchase orders can be saved as drafts but cannot be submitted for review or received.

Part B — Enquiry to approved quotation (steps 1–7)

Step 1. Enquiry

1. **Email enquiry:** open **Sales > Inbox email review**, click **Sync** to read new mail, open the customer's email and create an RFQ opportunity from it (Copilot / AI extraction or by hand). Long threads show only the newest message.
2. **Phone, visit or WhatsApp enquiry:** open **Sales > Manual RFQ Opportunities** and fill in **Customer RFQ reference** (optional), **Opportunity title**, the customer (type part of the name in **Find active customer by code or name**, click **Search customers**, then choose it under **Customer**), **Sender name** and **Sender email** (optional) and **Enquiry text received by the person**. Lines are entered in step 3.

Step 2. CRM opportunity

1. Open **Sales > RFQ Opportunities** and the new opportunity.
2. Link or create the **customer** (Sales > Customers). A new customer may need master-data approval before a quotation can be raised.
3. In **CRM Leads**, move the lead to **Qualified**, and to **Proposal** once the quotation is sent.

Step 3. Product identification

1. **Email RFQ:** on the RFQ opportunity, run **Match**. RES matches each line by the part number in the email first, then by technical specification. Exact or Suggested matches can be accepted; Ambiguous lines need you to pick the product.
2. **Manual RFQ:** for each line enter the requested description and quantity, type the part number in the line's product search, click **Find** and choose the catalogue product and unit. Put the customer's own words in **evidence**. Click **Add line** for the next item, then **Record manual RFQ**.
3. Enter the quantity for every line. A line without a quantity cannot be quoted.

Step 4. DYNICS price selection

1. **Email RFQ:** click **Create draft quotation**. RES fills each line with the catalogue selling price, or the OEM / list price converted at the approved exchange rate.

2. **Manual RFQ:** click **Check prices**. Lines with an approved customer price list are filled in; for the others type the **unit price**, then click **Prepare draft quotation**. RES shows the new quotation number (for example QT-2026-00006).
3. The DYNICS distributor cost for each product is carried into costing (step 5). If DYNICS sent a project price, update the product's distributor cost first (A5).

Step 5. Import costing

1. Open **Sales > Quotation Center** and click the quotation number.
2. Under **FX assessment**, enter only the three lead times (**Build / manufacture weeks**, **Dispatch to delivery days**, **Supplier payment terms**) and click **Assess automatically**. RES fills the DYNICS price in USD, today's approved rate and the expected rate on the supplier payment date, and saves the assessment.
3. Under **Costing**, choose **Freight** (in the line prices, a separate line, or none), the **Freight rule** (for example Air Freight 6,000 cm^3/kg), the **Forwarder rate card**, the **Packaging rule**, any charges (customs clearance %, bank remittance %), **Target %** and optional rounding. Click **Preview costing**: RES shows freight by chargeable weight, landed cost per unit, current and proposed margin, also at the adverse FX rate.
4. Click **Apply to quotation**, then **Yes, create the new revision**. The prices are saved as revision 2. Catalogue prices and price lists are never changed.

Step 6. Customer quotation

1. Click **Edit draft**. Under **Use a sample or company template** choose **Standard Quote** (or your company copy of it).
2. Check customer email, address and state, **Place of supply state**, **Delivery terms** and validity. Add a ship-to if goods go to a different address.
3. On each hardware line tick **Create installed asset on delivery** and fill **Asset type** and **Warranty months** (for example 36); manufacturer, model and part number are optional (A8).
4. Click **Save draft**. Use **Download document PDF** to check the customer document.
5. Click **Submit for approval**.

Step 7. Quotation approval

1. Every user allowed to approve (quotation.approve, right organisational level, not the maker) gets an **Action needed** email within about 2 minutes. The submitter gets a copy.
2. The approver opens the quotation and clicks **Approve**, or **Reject** with a reason. The submitter gets the outcome by email.
3. If nobody acts, reminders go out after 5 hours, then every 24 hours, 4 times.
4. After approval, email the PDF from the quotation (**Email** / document delivery) and click **Mark sent**.
5. **No decision yet from the customer?** Enter a reason, choose a **Review on** date and click **Put on hold**. On that date the quotation owner gets an email. Use **Resume** to bring it back. From hold you can still record the customer's order (step 8), mark it lost or create a revision.
6. **Customer declined?** Enter the reason and click **Mark lost**.

Part C — Customer order to DYNICS confirmation (steps 8–11)

Step 8. Customer PO / Work order

The customer issues a PO or work order against the approved quotation. Record it on the quotation; that creates the Sales Order.

1. Open the approved, sent or on-hold quotation in **Quotation Center**.
2. In **Customer PO / Work order received**, enter:
    - **Order type**: Purchase order (PO) or Work order (WO)
    - **Number** and **date** exactly as printed on the customer's order
    - **Value** (optional) and whether it **includes GST**
    - **Required delivery date** (optional)
    - **How it was received**, for example "email from the buyer on 20-Nov-2026"
3. Tick the confirmation and click **Record order & create Sales Order**.
4. If the value differs from the quotation, or the order is dated after the quotation expired, RES lists the differences. Either tick **I have reviewed the differences** and record it, or revise the quotation first.

RES marks the quotation **Won** and creates one **Open** Sales Order (SO-000001).

Step 9. Sales order

1. Open **Sales > Order Tracking** and click the Sales Order.
2. Under **8. Customer PO / Work order**, upload the customer's PO or WO PDF (document type **Customer PO** or **Customer work order**).
3. To correct the order details later, click **Correct order details**, change them and give a reason. The change is audited.

Step 10. DYNICS purchase order

Your backend PO to DYNICS is a RES purchase order: one per Sales Order line, entered in rupees at the approved rate, and approved by a second person before goods can be received.

1. Open **Finance > Receivables** and click the **Procurement** tab.
2. **New requisition**: choose the **Order line** (SO number and product), the **Stock identity** (the stock-tracked product, A5), the quantity and a reason, then **Save requisition**. Repeat for each line.
3. **New purchase order**: choose the requisition, **Active supplier** DYNICS, the **Agreed supplier unit cost** in INR, and the **Supplier quotation reference** (DYNICS's quote number; add the USD price and rate there, for example "DYN-Q-26-1187 (USD 2,850.00 @ 95.60)"). Add a reason and click **Save draft purchase order**.
4. Under **Order review**, open the order, give a reason and click **Submit for independent review**. A different person with procurement.approve approves it with **Approve unchanged order**; then click **Apply independently approved order** (needs the approved policy, A9).
5. Send the PO to DYNICS from your usual email. RES does not yet print or email the PO; quote the RES PO number on it.

6. In Order Tracking, upload your PO as document type **Our PO to supplier**.

The POs appear in Order Tracking under **10. Purchase orders to the supplier**.

Step 11. Supplier confirmation (acknowledgement and ETA)

1. In Order Tracking, under **11–15. Shipments**, enter the supplier (DYNICS) and click **New shipment**. It opens as **Ordered** and links the Sales Order's DYNICS POs.
2. When DYNICS acknowledges, open the shipment and enter:
    - **Acknowledgement number** and **acknowledgement date**
    - **ETA ex-works (confirmed)**
3. Set the status to **Acknowledged** and click **Save shipment**. RES refuses Acknowledged without the number and ETA.
4. Upload the DYNICS acknowledgement (document type **Supplier acknowledgement**).
5. **ETA revised by DYNICS?** Change the date, enter the reason (for example "DYNICS revised: component shortage") and save. RES keeps every revision in **History**, and the salesperson who recorded the order gets an **ETA revised** email.

If DYNICS has not acknowledged within 3 days of the shipment being opened, purchasing gets a follow-up email, with reminders after 5 hours and then daily.

Part D — Shipment, customs and delivery (steps 12–15)

All of these are on the same shipment in **Order Tracking**. Save after each step. Each status needs its evidence; RES refuses the status until the listed fields are filled.

Status	Fields RES requires
Acknowledged	Acknowledgement number, ETA ex-works
Shipped	Mode, AWB / BL number, shipped-on date
Arrived	Arrived-on date
Cleared	Bill of entry number and date, cleared-on date
Received	Received-at-warehouse date
Delivered	Delivered-to-customer date

Moving a shipment back to an earlier status, or cancelling it, needs a reason.

Step 12. Shipment preparation

1. Under **12. Shipment preparation**, enter packages, gross weight (kg) and volume (CBM) from the DYNICS packing list.
2. Under **Packing list and serial numbers**, click **Add line** for each item:
    - pick the **Sales order line** (description and quantity fill in)
    - enter the **part number**, **box** reference and the **serial numbers**, one per line

3. Click **Save packing list**. RES refuses duplicate serials, or more serials than the quantity.
4. Upload the packing list and commercial invoice (document types **Packing list** and **Commercial invoice**; PDF or .xlsx).
5. Set the status to **Ready to ship** when DYNICS confirms the goods are packed.

The serial numbers entered here become the warranty records in step 18. Enter them carefully.

Step 13. International shipping

1. Under **13. International shipping**, enter:
    - **Mode** (Air, Sea, Courier, Road) and **Incoterm** (for example EXW, FCA, CIF)
    - **Forwarder** and **carrier / airline / line**
    - **Transport document** type (AWB, HAWB, BL, HBL, Courier, LR) and its **number**
    - **Port of loading** and **port of discharge**
    - **ETD**, **ETA (arrival)** and **Shipped on**
    - **Tracking link** (the carrier's tracking page, https://...)
2. Set the status to **Shipped** and save. Upload the AWB or BL.
3. When the goods land, enter **Arrived on** and set **Arrived**.

If the ETA passes before the shipment arrives, purchasing gets a follow-up email. Record the new ETA with the reason; sales is told automatically.

Step 14. Customs clearance

1. Set the status to **Under customs** while the CHA files the bill of entry.
2. Under **14. Customs clearance (INR)**, enter:
    - **Bill of entry number** and **date**, **customs port**, **customs broker (CHA)**
    - **Assessable value**, **basic customs duty**, **social welfare surcharge**, **import IGST**, **other customs charges**
    - **Duty estimated in costing** (type the customs estimate from the quotation costing in step 5)
    - tick **Import IGST credit claimed** once it is taken in GST returns
    - **Cleared on**
3. Set the status to **Cleared** and save. RES shows the duty paid and how far it is above or below the costing estimate.
4. Upload the bill of entry, duty payment challan and the CHA invoice.
5. The salesperson gets a **Cleared customs** email to arrange delivery.
6. Enter the CHA, freight forwarder and duty bills as supplier bills in **Finance > Payables** so they are paid and booked.

Step 15. Customer delivery

1. When the goods reach the warehouse, enter **Received at our warehouse** and set **Received**.
2. Optional: receive the stock against the DYNICS PO in **Finance >** Receivables, Procurement tab, Receive goods (goods receipt into PUNE-WH), quoting "DYNICS invoice no. / BOE no.".

3. Deliver to the customer. Enter **Delivered to customer** and the **delivery challan / POD reference**, set **Delivered** and save.
4. Upload the signed delivery challan or proof of delivery.

Part E — Invoice, payment, warranty and closure (steps 16–18)

Step 16. Customer invoice

1. Open **Finance > Invoices**. Under **Sales order to invoice**, enter the quotation's ID in **Quotation ID with an accepted Sales Order** and click **Load quotation**. RES shows the Sales Order and the quantity still available to invoice per line.
2. Enter the **Invoice quantity** per line (all of it, or part for a part shipment) and click **Create draft invoice**.
3. Click **Edit draft**, choose the **Standard Invoice** template and **Save draft**. Check seller, bill-to, GST (CGST + SGST within the state, IGST between states) and totals.
4. Set the **Invoice date** and **Due date** and click **Issue and generate PDF**. RES gives the tax invoice number (for example INV/2026-27/00003). E-invoice settings apply if configured.
5. Email the PDF from **Document delivery** (Email PDF) or download it.

The invoice appears in Order Tracking under **16–17. Invoice and payment**.

Step 17. Payment collection

1. When the customer pays, open the invoice in **Finance > Invoices** (View) and enter **Amount**, **Received on**, **Reference** (bank UTR) and optional **Remarks**, then click **Save payment**. The status moves to Partially Paid or Paid.
2. Part payments are allowed; record each one.
3. Bank receipts can also be matched in **Finance > Bank Intelligence**.

Order Tracking shows invoiced and received amounts.

Step 18. Warranty register and closure

Warranty register (CMDB)

1. In Order Tracking, open **Warranty register (CMDB)**. It lists each line marked **Generate asset record** with how many assets are registered.
2. Tick **The serial numbers on the packing lists are correct** and click **Register warranty assets from serials**. RES creates one asset per serial number, linked to the issued invoice line. The invoice must be issued first.
3. Warranty starts on the invoice date and runs for the line's warranty months.
4. Open **Assets > Installed Base & CMDB** to add the customer site and installation date, or adjust the warranty start if it should run from delivery.
5. **Assets > Warranty** and **Assets > AMC** then track expiry, service and renewal.

Closure

Order Tracking shows the closure checklist:

Check	Blocks closure?
Customer PO / WO recorded	No (warning)
Supplier purchase order raised	No (warning)
All shipments delivered or cancelled	Yes
Invoiced in full	Yes
Payment collected in full	Yes
Warranty assets registered for every unit marked	Yes

1. When every blocking check is green, enter a **closing note** (for example the actual margin) and click **Close order**.
2. The Sales Order becomes **Closed**; its shipments and customer order details can no longer be changed.
3. In **CRM Leads**, set the lead to **Converted**.

Industry bundles

Everything in this manual is part of Core Foundation, so it works in every edition and with every industry bundle: quotation hold, customer PO / WO, Order Tracking, shipments and customs, documents, warranty assets, closure and email alerts. It also works for Sales Orders created from an RFQ or by direct entry; add the customer order details later with **Correct order details**.

Where a bundle runs its own work from the Sales Order, Order Tracking shows it under **Industry work linked to this order**, and the order cannot close until that work is finished.

Bundle	What Order Tracking shows	Closure needs	Extra email alert
Distribution & Trading	Dispatches (FUL-) with carrier, tracking and dispatch date	Every dispatch dispatched or cancelled	—
Construction	Projects created from the Sales Order, certified billing, bills awaiting certification	Every project completed	Progress bill waiting for certification goes to construction.manage users (never the preparer), with reminders; the preparer gets the outcome
Manufacturing	Production orders with completed and	Every	—

Bundle	What Order Tracking shows	Closure needs	Extra email alert
	planned quantity	production order completed	
Retail	Not applicable: point-of-sale sales do not use Sales Orders	—	—
Real Estate	Not applicable: bookings and collections do not use Sales Orders	—	—

When no industry work is linked, the check shows as a warning only and does not block closure.

Email alerts, limits and go-live checklist

Email alerts

RES checks every 2 minutes and sends each alert once. Action alerts are repeated 5 hours later, then every 24 hours, 4 times, while the item is still waiting.

Alert	Sent when	Goes to
Action needed (approval)	A quotation, price list, exchange rate, supplier bill or payment, bank posting, purchase order, adjustment or customer change reaches an approval level	Everyone allowed to approve it; copy to the requester
Outcome	The item is approved, rejected, returned, withdrawn or expires	The requester
On-hold review due	A quotation on hold reaches its review date	The quotation owner
Supplier acknowledgement overdue	A shipment is still Ordered with no acknowledgement 3 days after it was opened	Purchasing (procurement.prepare); copy to the salesperson
ETA passed	The arrival (or ex-works) ETA is past and the goods have not arrived	Purchasing; copy to the salesperson
ETA revised	Someone changes a confirmed ETA	The salesperson who recorded the customer order
Cleared customs	A shipment is set to Cleared	The salesperson, to arrange delivery

Known limits in 19.3.1

- Only the customer order value and date are compared with the quotation, not line quantities.
- One DYNICS PO per Sales Order line, entered in INR (the stock currency); keep the USD price and rate in the supplier quotation reference. RES does not print or email the PO.
- Procurement needs stock tracking for the product, which is switched on from the Manufacturing or Distribution & Trading inventory screens (A5).
- A Sales Order can be closed while its DYNICS POs are still drafts; check the PO status in Order Tracking before closing.
- Shipment dates (shipped, arrived, cleared, delivered) are not checked against today's date; enter the real dates.
- Duty estimated in costing is typed on the shipment; it is not copied from the quotation costing.
- RES records shipping facts; it does not book carriers or pull live tracking. Use the tracking link.
- Warranty starts on the invoice date by default; adjust per asset in Assets if it should start at delivery.
- A Sales Order closes by the Close order button once the checklist is green, not automatically.

Go-live checklist

- ☐ A1 users and roles set; at least two people for every approval
- ☐ A2 company email saved and verified
- ☐ A4 approved USD to INR rate in force (the current one ends 22 Nov 2026)
- ☐ A5 DYNICS vendor, products with part numbers, specifications and distributor cost, stock tracking and a stock location
- ☐ A6 freight rules and rate cards
- ☐ A7 Standard Quote and Standard Invoice copied with RPPL terms; company phone, email, website and logo filled in
- ☐ A8 sales briefed to tick Create installed asset on delivery with warranty months
- ☐ A9 procurement approval policy approved by two people
- ☒ RES 19.3.1 build 5b85f5f3 installed and checked on screen (21 Nov 2026)
- ☒ One trial order run end to end, steps 1 to 18 (SO-000003 and SO-000005, 21 Nov 2026)

Demonstration and training video

Two videos accompany this manual, both recorded live on build 5b85f5f3 with sample customer Zenith Demo Automation. The Training Video (about 10½ minutes) walks through all 18 steps with step-by-step narration, for engineers and new users. The Customer Presentation Video (about 3 minutes) shows the main benefits, for customer demonstrations. Both have subtitles, use synthetic data only, and are stored with the RES 19.3.1 release documents and in the offline user guides folder (User-Guides\19.3.1).