zenoziva

Zenoziva ERP Guidebook for IT solutions companies

Enquiry to quotation, purchase to serial number, installation to handover, tickets and AMC, GST and payroll: every desk, step by step.

> Every company, person, product, brand, serial number and amount on the screens in this guide is fictional demo data from our IT-solutions demo company, Demo IT Solutions Pvt Ltd.

Edition 1, November 2026. Zenoziva ERP 16 with the IT-solutions set-up and the Zenoziva HR app.
Zenoziva Business Solutions Private Limited · zenoziva.com

About this guide

This guide shows how a systems integrator runs its business in Zenoziva ERP: winning the work with a quotation that reads like a bill of quantities, buying from distributors, tracking every camera, switch and UPS by its serial number, installing and handing over, billing with GST, supporting customers under warranty and AMC, and paying the team.

Each chapter is written for one desk and opens on that desk's own menu. The first chapter, Getting started, is for everyone. The last shows the Zenoziva HR app that every employee uses on the phone.

Every screenshot was taken on a working copy of our IT demo. The company (Demo IT Solutions Pvt Ltd), its customers, distributors, staff, products, brands, GSTINs and amounts are fictional demo data. GST rates, HSN and SAC codes and salary components on the screens are illustrative; your own are set up with you.

Menus, reports, print formats, letterheads and who may see what are set up to match your company. For questions, training or changes, contact your Zenoziva team through zenoziva.com.

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CHAPTER 1

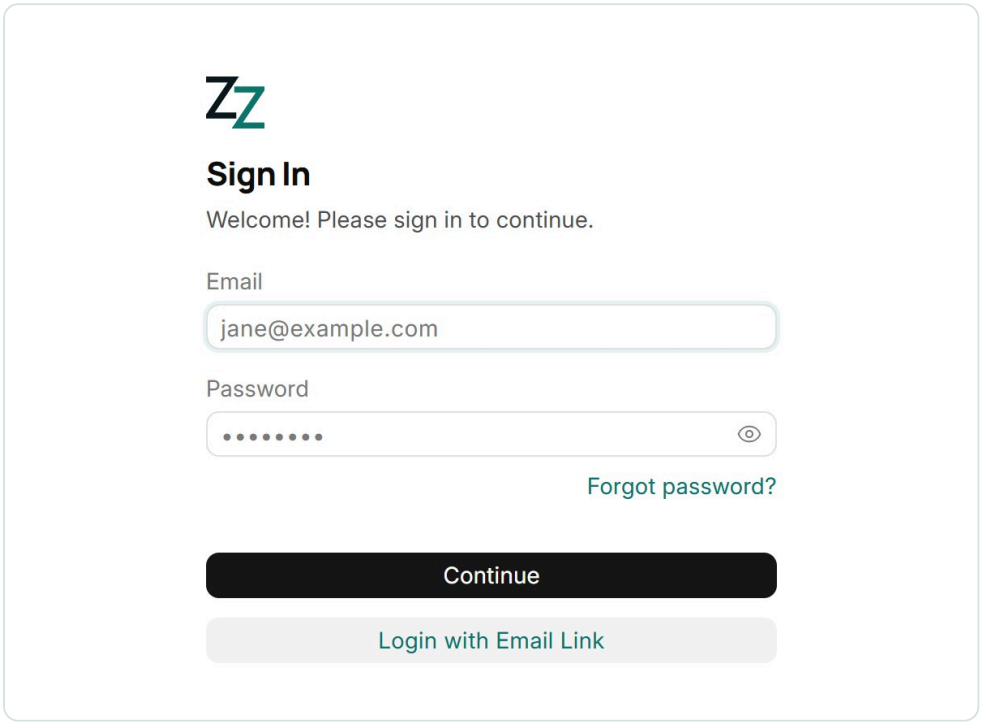
Getting started

For: Everyone

Each person signs in with their own login and sees only the menus for their work. A salesperson sees Sales & quotes; the storekeeper sees Stores & serials; the owner sees the whole business.

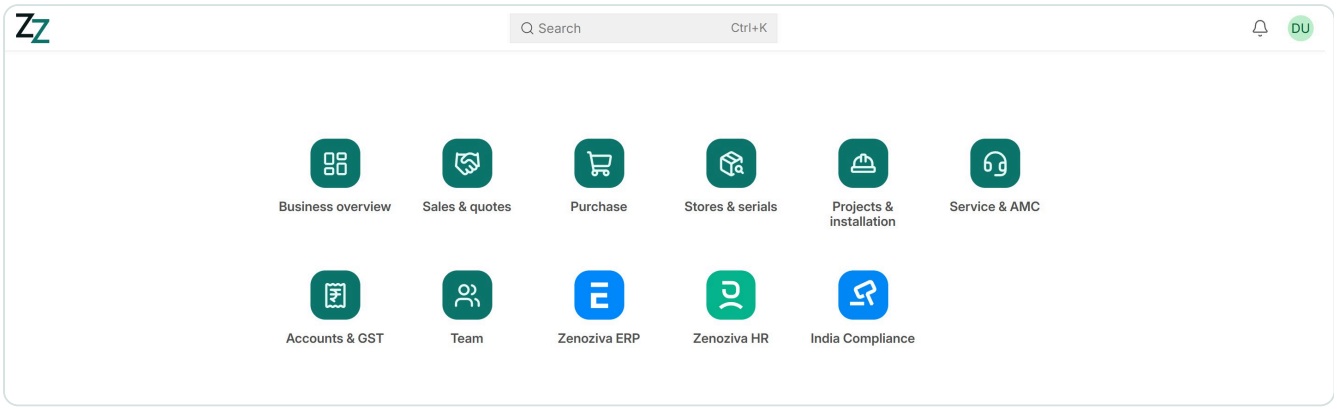
1.1 Sign in

Open your company's ERP address in a browser and sign in with your email and password. **Forgot password?** sends a reset link to your email. Never share a login: every record shows who made it.



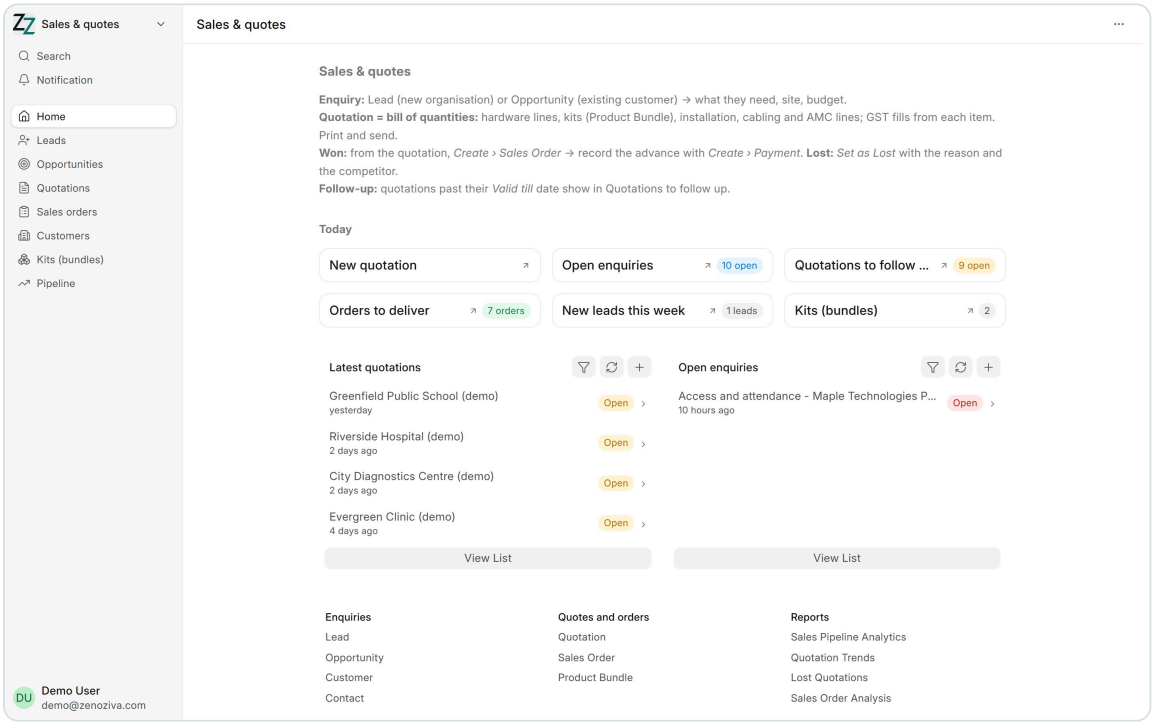
1.2 Your desktop

One tile per menu you may use: **Business overview**, **Sales & quotes**, **Purchase**, **Stores & serials**, **Projects & installation**, **Service & AMC**, **Accounts & GST** and **Team**. Administrators also see the full set of ERP modules. The search bar at the top (**Ctrl+K**) finds any record, report or screen by name.



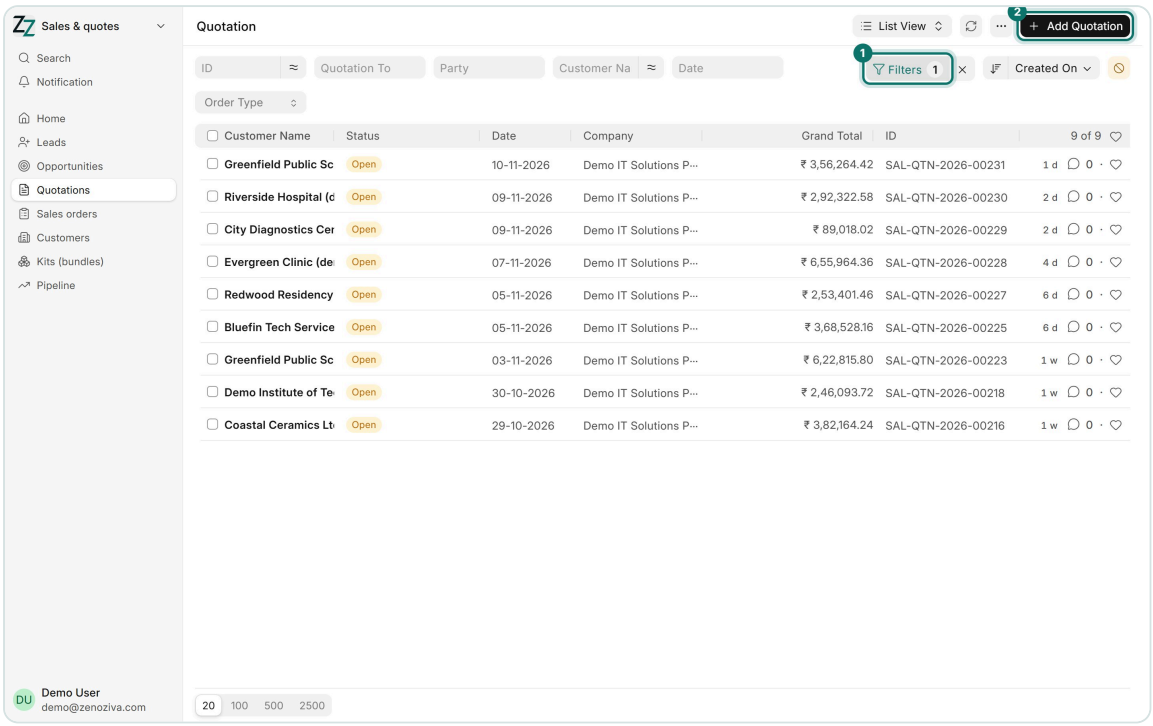
1.3 A menu page

Every menu opens the same way: a short note on how the work flows, **Today** with live counts (click one to open the records behind it), the latest records, and links to every list and report of that desk. The sidebar on the left lists the main screens of that menu.



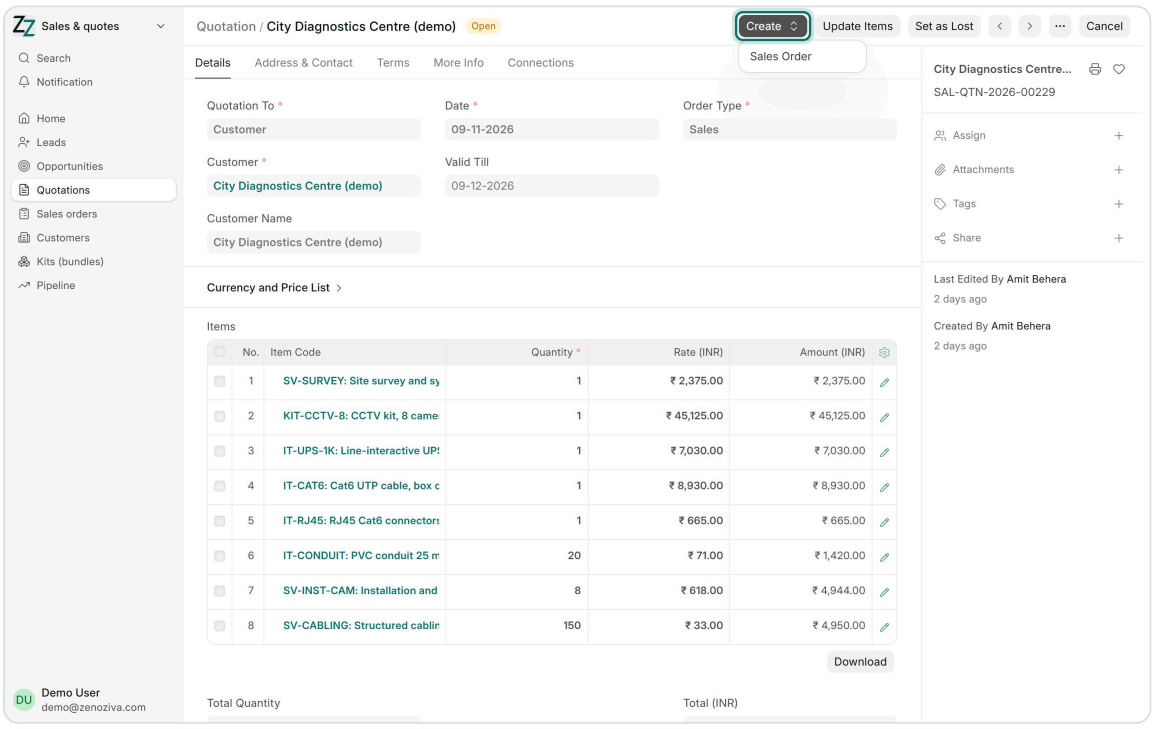
1.4 Lists

Each sidebar item opens a list. Type in the boxes at the top to filter, use **Filters** (1) for more conditions, sort by any column, and click a row to open it. **Add Quotation** (2), or the matching button on any list, starts a new record.



1.5 One record leads to the next

Most work moves forward from the record you are on: **Create** lists the next steps. Here a quotation becomes a **Sales Order** in one click, with its customer, items and prices copied across. Nothing is typed twice.



CHAPTER 2

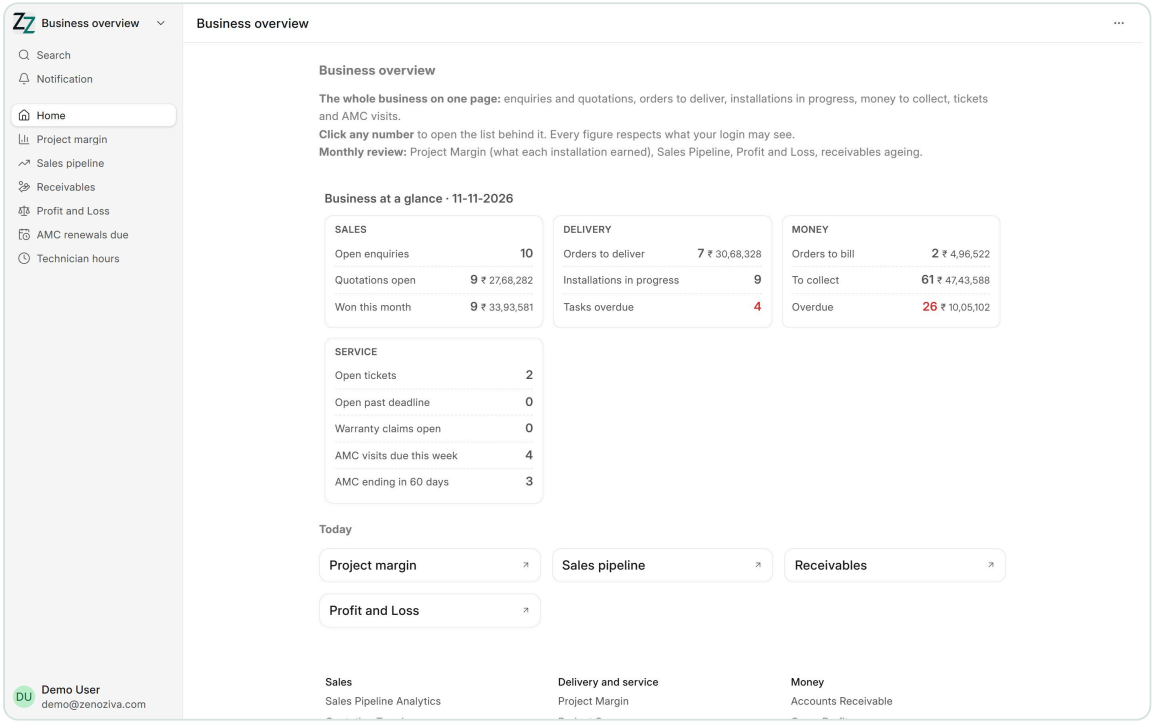
Business overview

For: Owner, directors, managers

One page answers "how is the business doing today?": enquiries and quotations, orders to deliver, installations, money to collect, tickets and AMC visits. Every figure respects what your login may see.

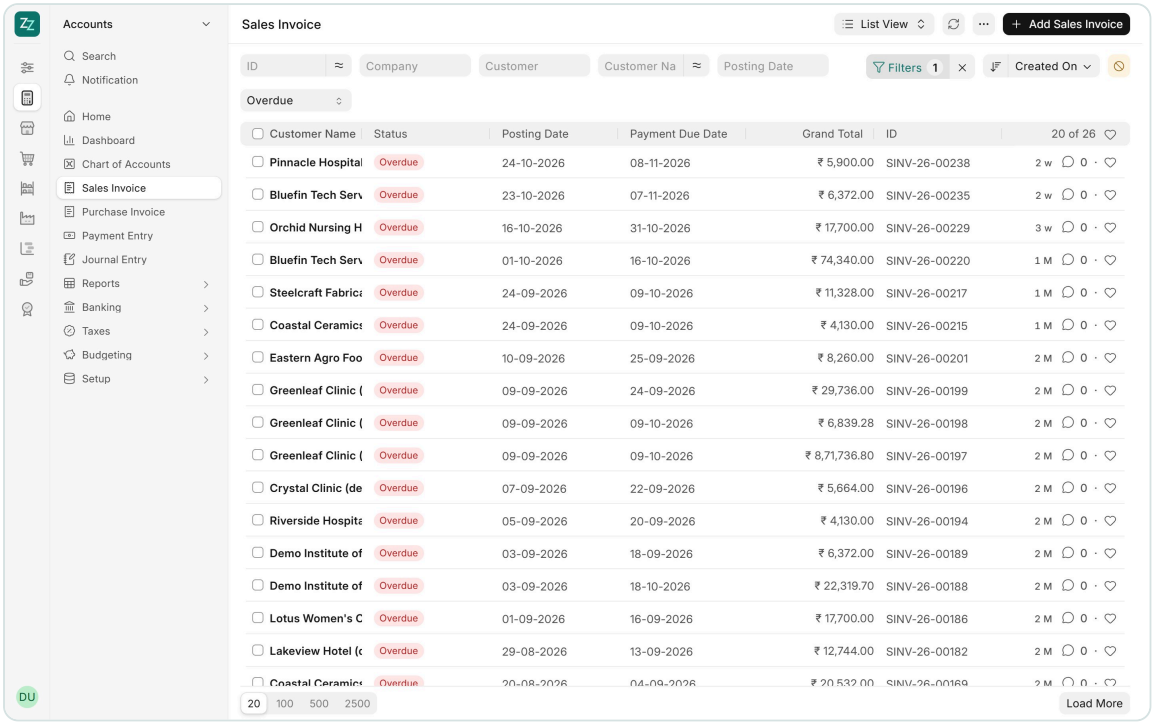
2.1 Business at a glance

Four panels: **Sales** (open enquiries, quotations open and their value, orders won this month), **Delivery** (orders to deliver, installations in progress, overdue tasks), **Money** (orders to bill, money to collect, overdue) and **Service** (open tickets, tickets past their deadline, warranty claims, AMC visits this week, AMC contracts ending in 60 days). Red figures need attention.



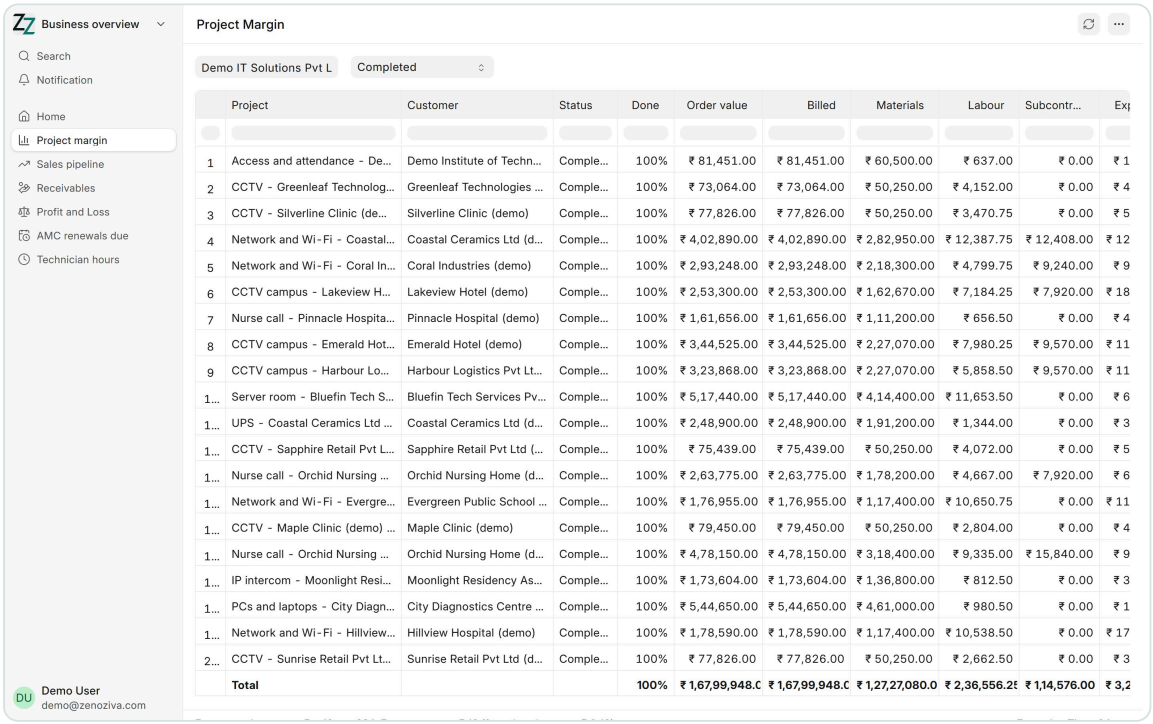
2.2 Click any number

Each figure opens the list behind it. Clicking **Overdue** shows the invoices past their due date, with customer and amount; open one to call the customer or record the payment.



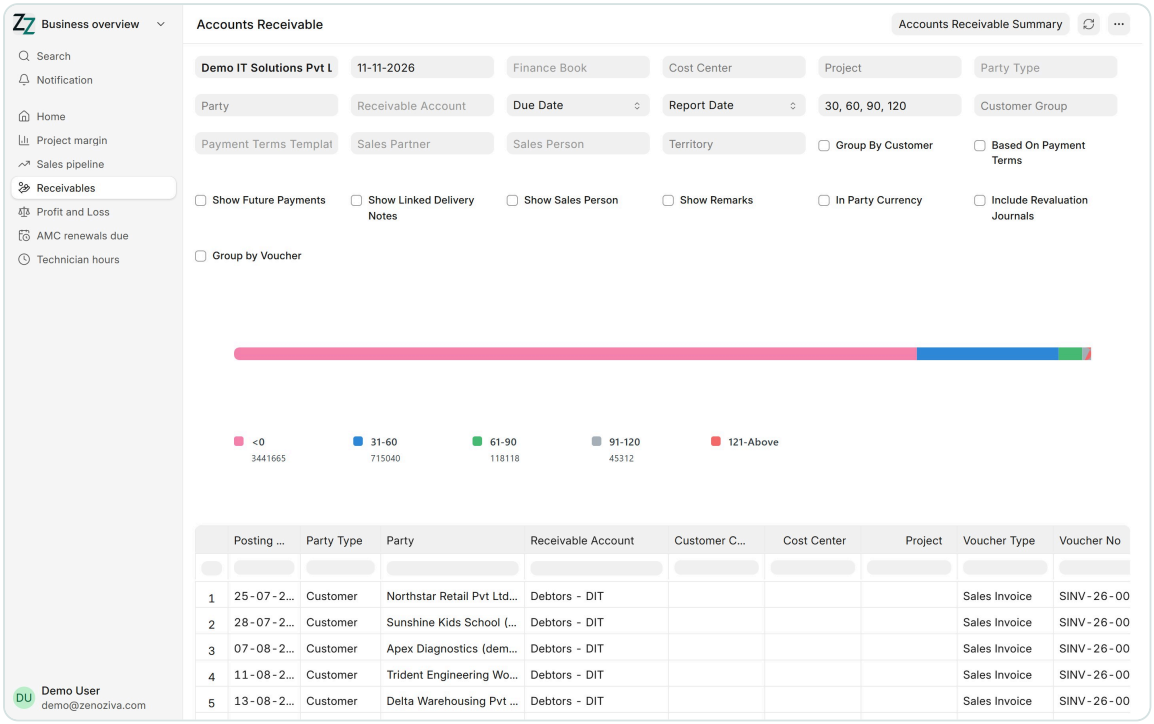
2.3 Project margin

What each installation earned: order value, billed, materials, labour (technicians' hours at their cost), subcontract and travel, and the margin. Filter by customer, status or dates; sort by margin to find the jobs that lost money.



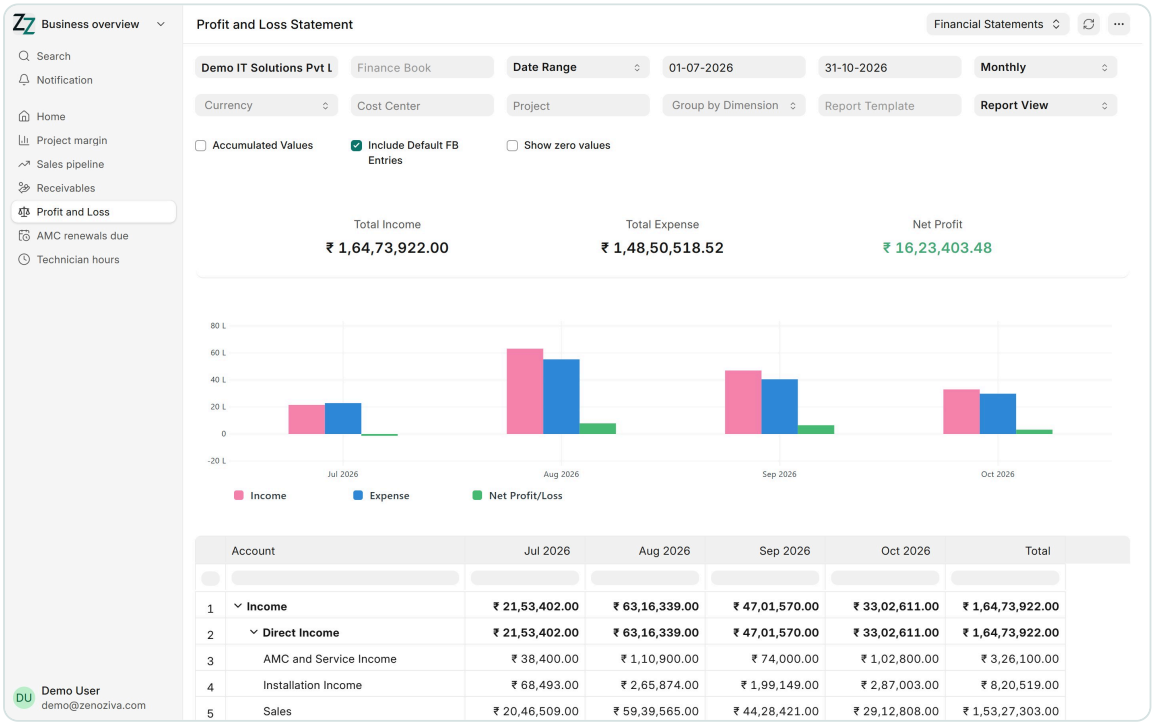
2.4 Receivables

Who owes what, and for how long, in age buckets. Click a customer to see their invoices and payments.



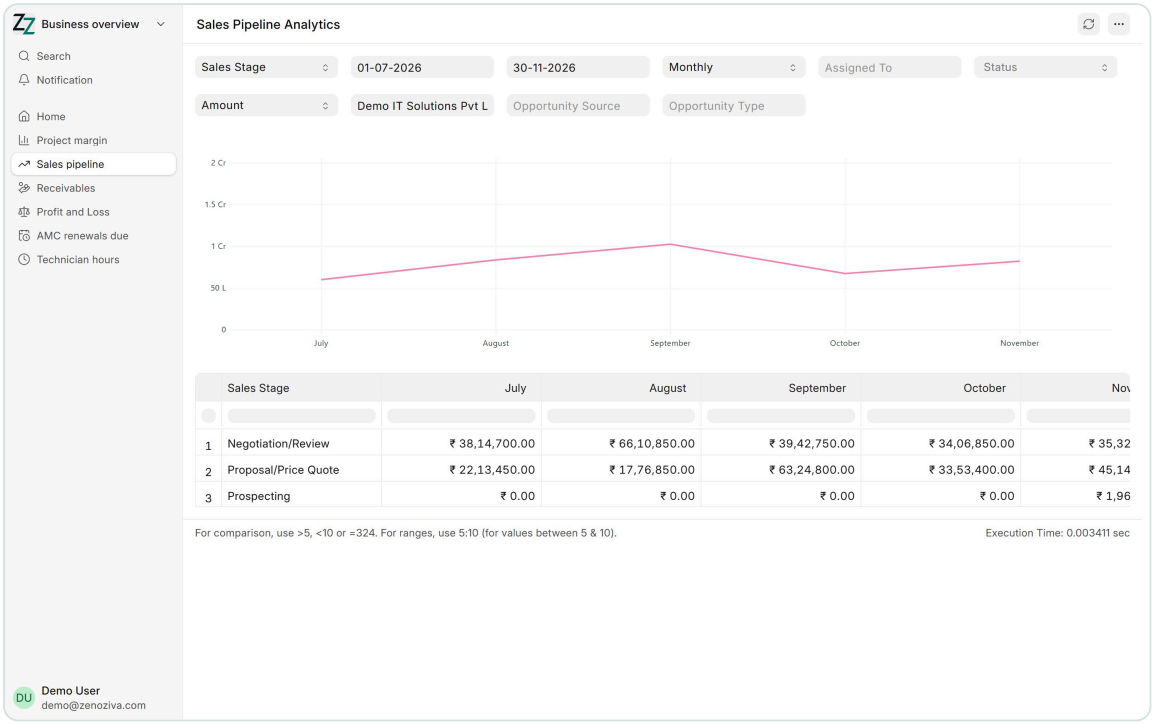
2.5 Profit and loss

Income and expenses month by month. Every report can be filtered, exported to Excel or PDF, and printed.



2.6 Sales pipeline

The value of open opportunities by sales stage, month by month: how much is at proposal stage and how much is being negotiated.



CHAPTER 3

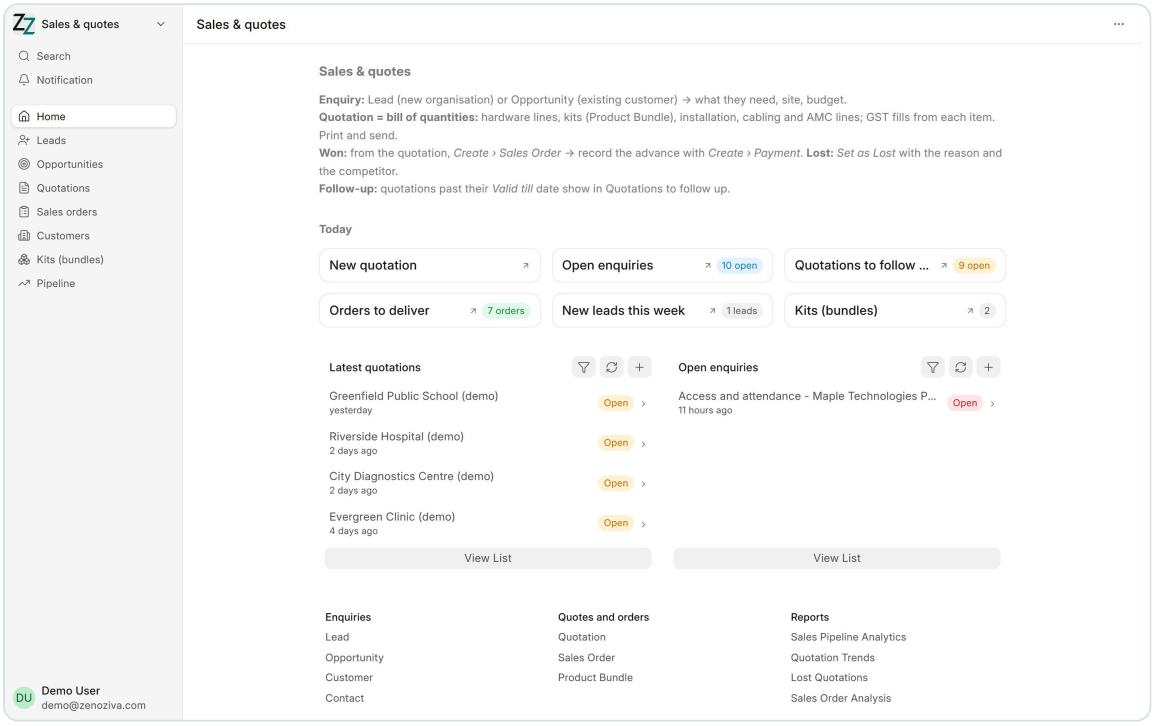
Sales & quotes

For: Sales team, sales manager

An enquiry becomes a quotation that reads like a bill of quantities: hardware, kits, cabling, installation and AMC lines, with GST worked out per line. Won quotations become orders; lost ones keep their reason.

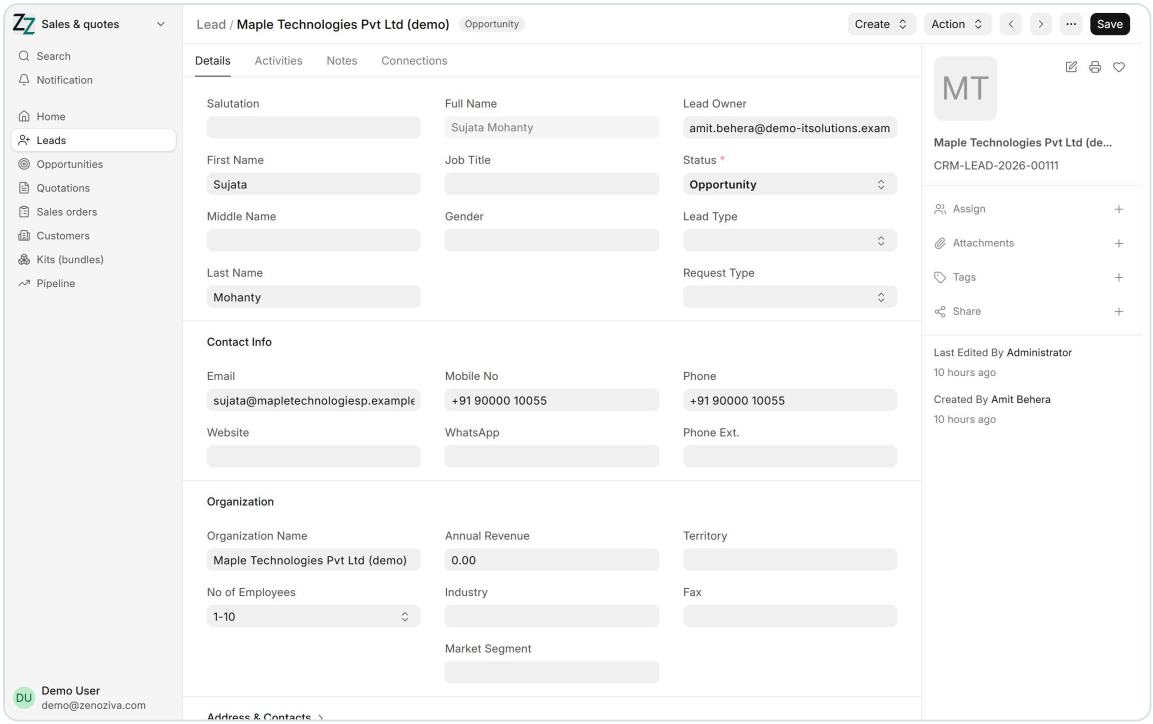
3.1 The Sales & quotes menu

Today shows open enquiries, **Quotations to follow up**, **Orders to deliver** and new leads this week. **New quotation** starts one straight away.



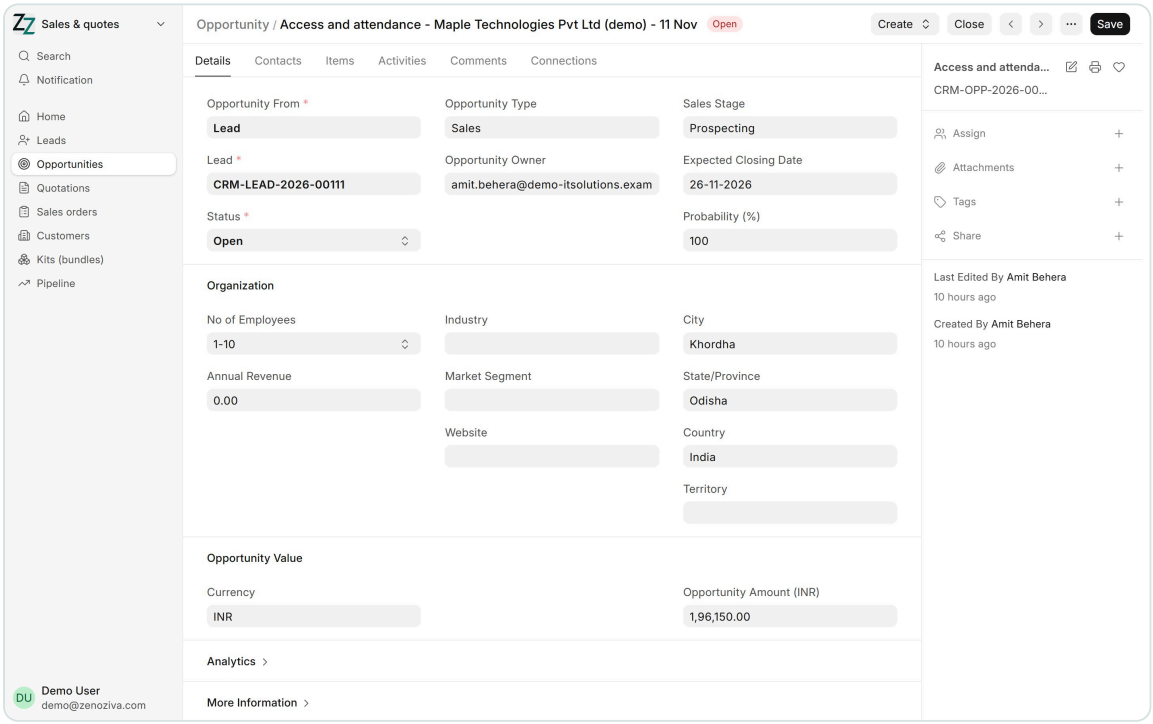
3.2 A lead

A new organisation that has asked for something: contact person, phone, email, organisation and the salesperson who owns it (**Lead Owner**). The **Status** moves on as you reply, quote and win.



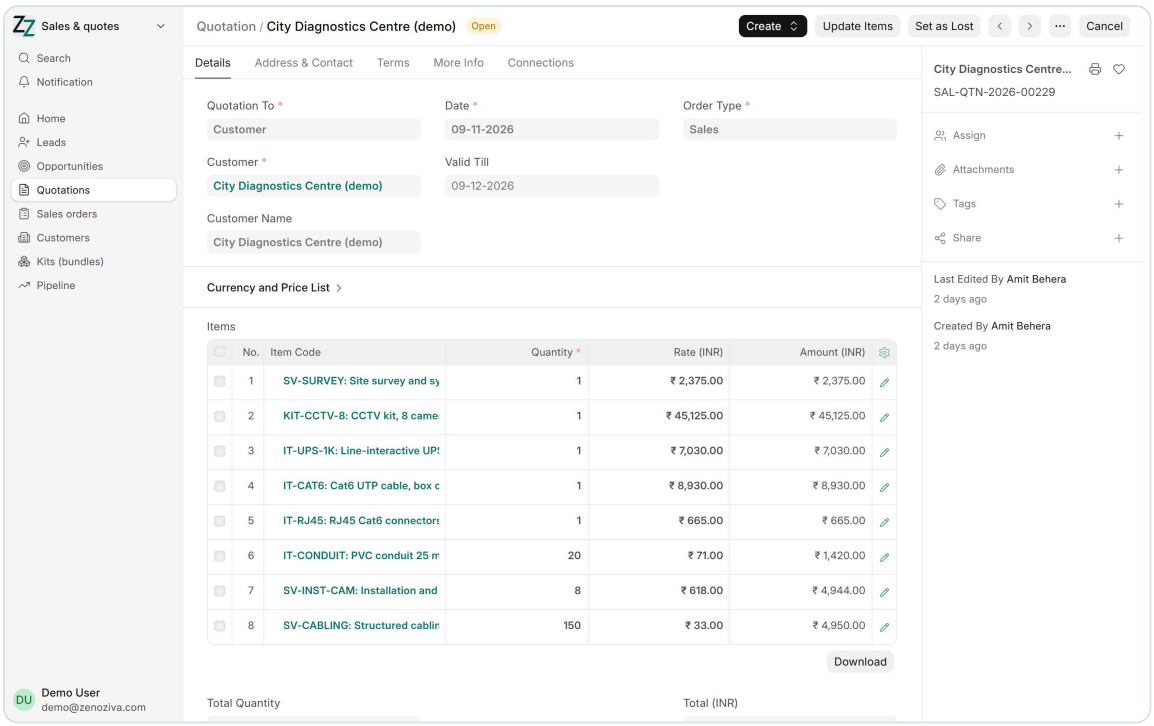
3.3 An opportunity

What the customer needs: for an existing customer, or created from a lead. **Sales Stage**, **Expected Closing Date**, **Probability (%)** and **Opportunity Amount** feed the sales pipeline. **Create** makes the quotation from here.



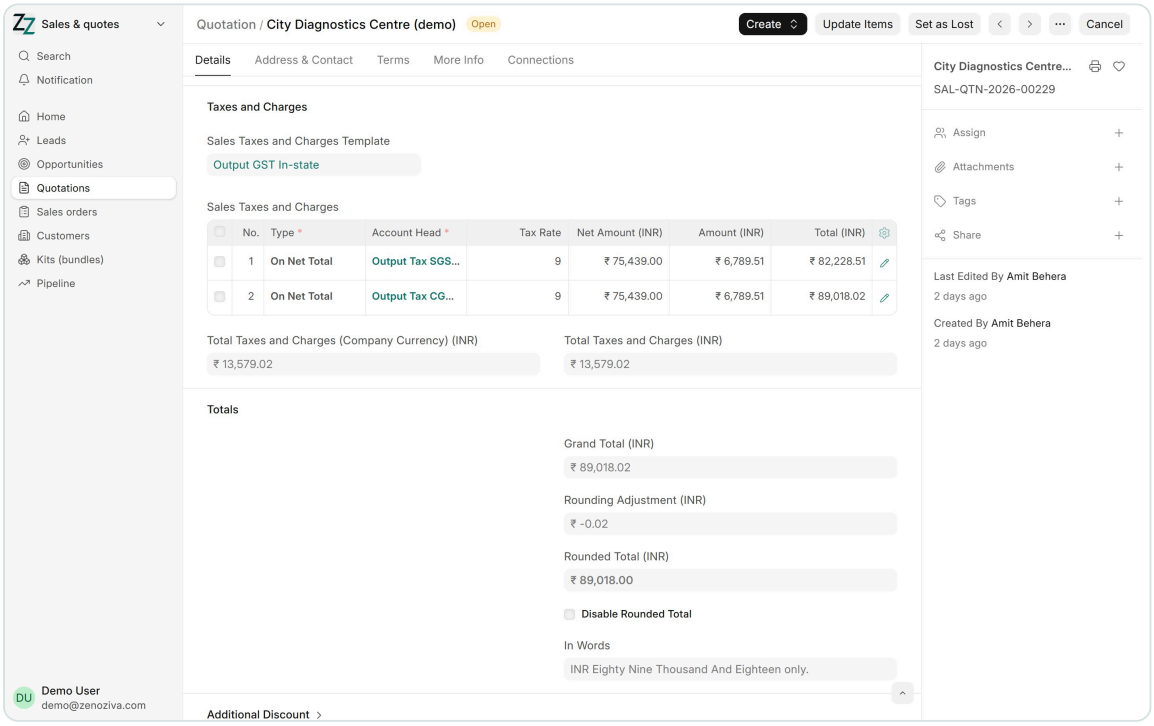
3.4 The quotation: a bill of quantities

Each line is an item with its quantity and rate: site survey, an 8-camera CCTV kit on one line, UPS, cable by the box, connectors, conduit, installation per camera and structured cabling by the metre. **Valid Till** sets the date for follow-up.



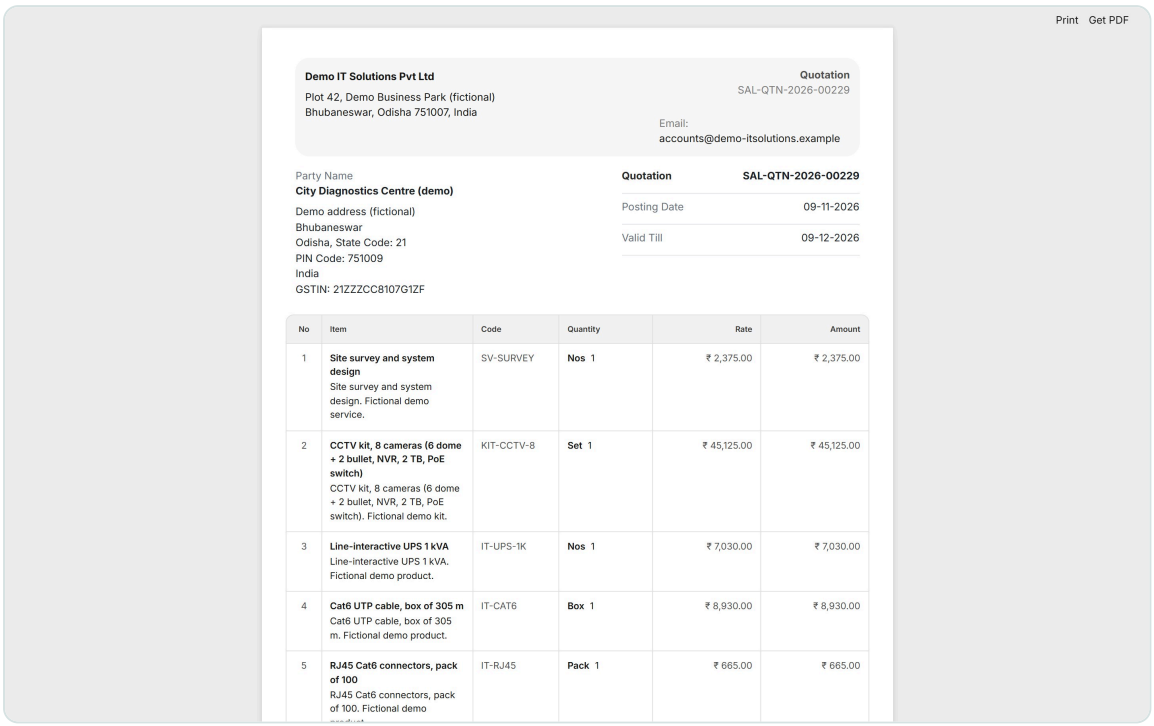
3.5 GST on the quotation

The tax template fills itself from the customer's state: CGST and SGST within the state, IGST outside it. Totals and the amount in words follow below.



3.6 Print and send

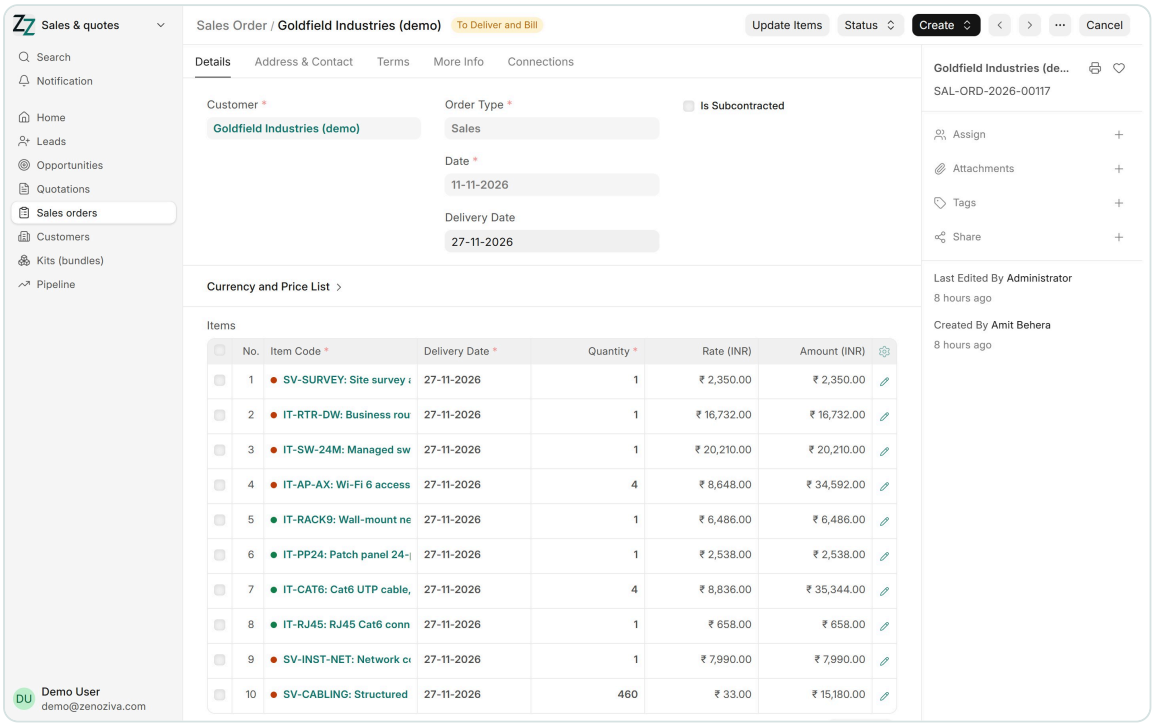
The print icon opens the quotation on your letterhead, with item descriptions, quantities, rates and totals. **Get PDF** saves it to send by email or WhatsApp; **New Email** on the record sends it from the ERP and keeps a copy there.



3.7 Won: the sales order

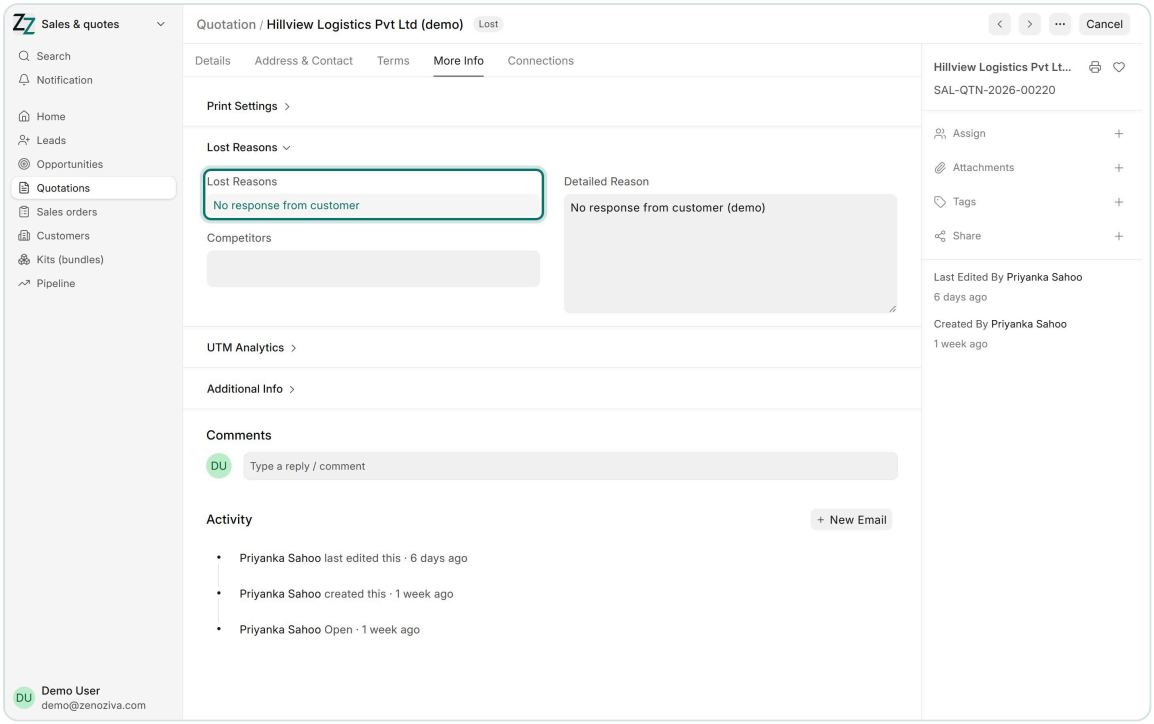
From the quotation, **Create** › **Sales Order**. The order holds the delivery date per line; a coloured dot shows whether each item is in stock. From here, **Create** makes the purchase request, the project, the delivery and the invoice, and records the advance.

> If a job needs more cameras than a kit holds, put all the parts on separate lines instead of the kit plus extra cameras.



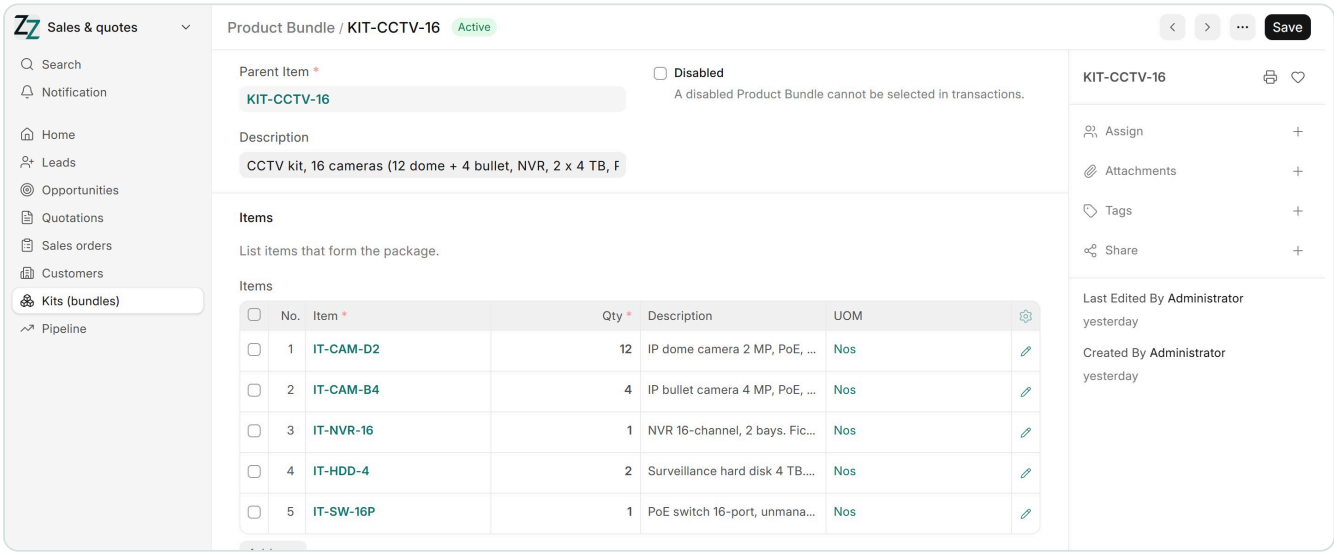
3.8 Lost: keep the reason

Set as Lost asks for the reason (and the competitor, if known). It shows under More Info › Lost Reasons, and the Lost Quotations report adds them up, so you can see why work is lost.



3.9 Kits (bundles)

A kit is sold as one line but delivered as its parts: here 12 dome cameras, 4 bullet cameras, an NVR, two hard disks and a PoE switch. Stock and serial numbers are kept for each part.



CHAPTER 4

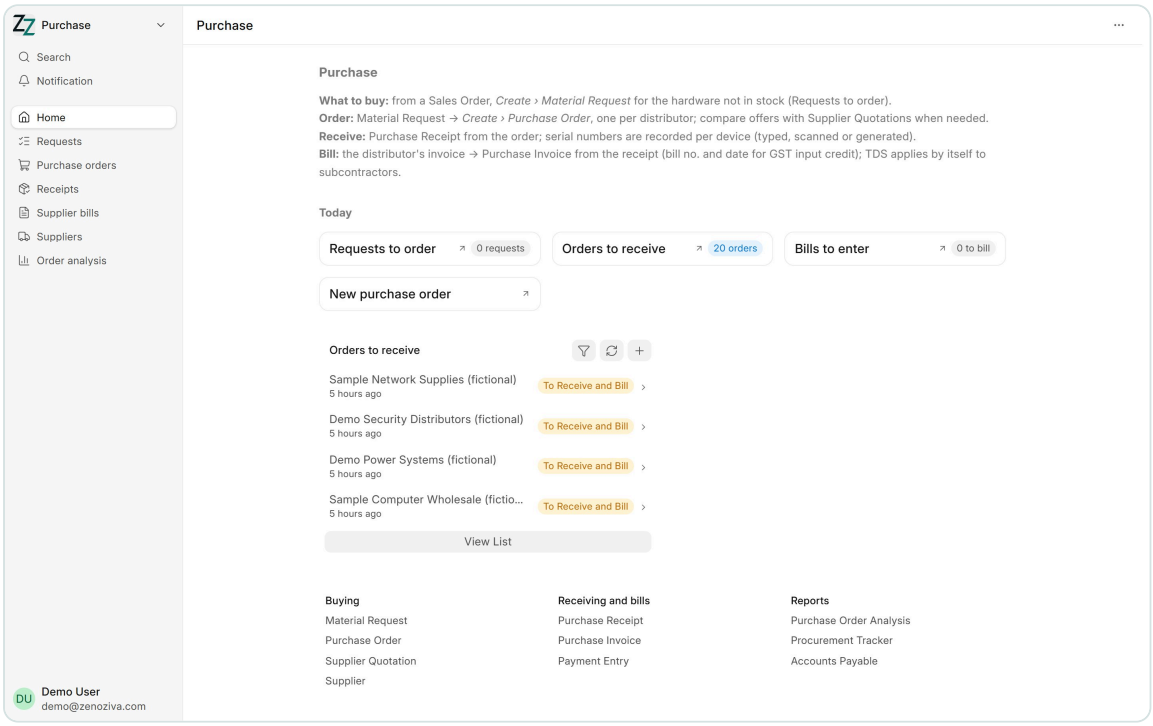
Purchase

For: Purchase team

Buy what the orders need from your distributors, receive it with a serial number for every device, and enter the distributor's bill for GST input credit.

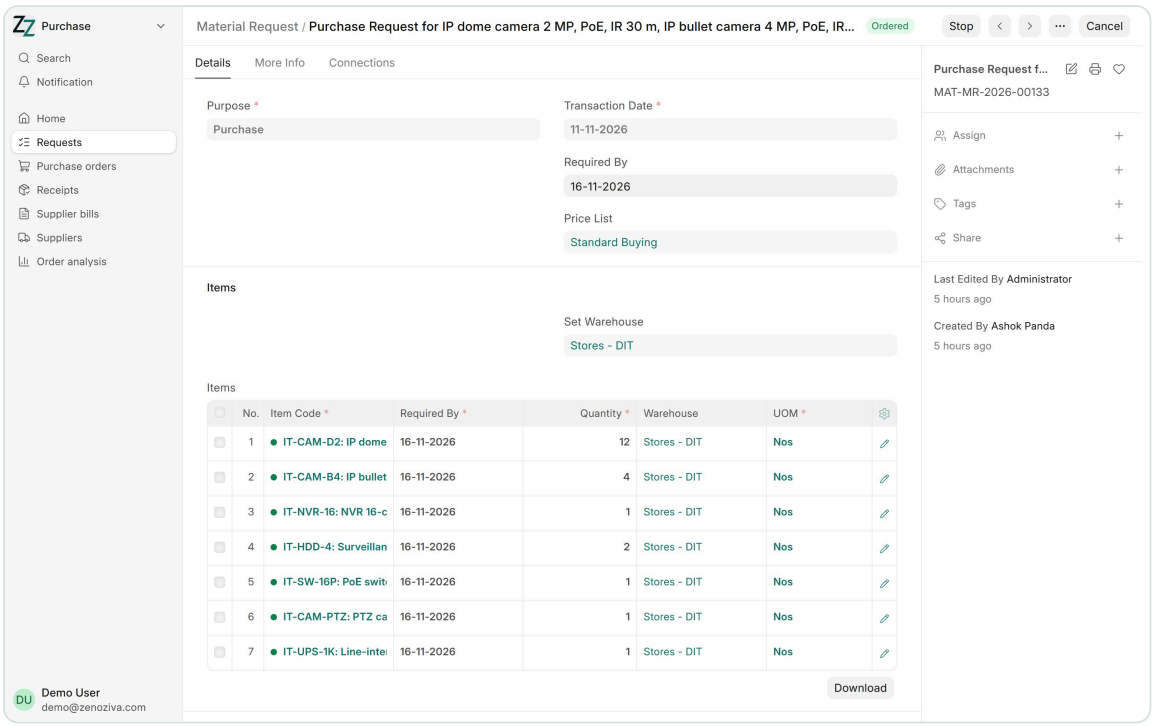
4.1 The Purchase menu

Requests to order (what the orders need and the store does not have), Orders to receive, Bills to enter, and New purchase order.



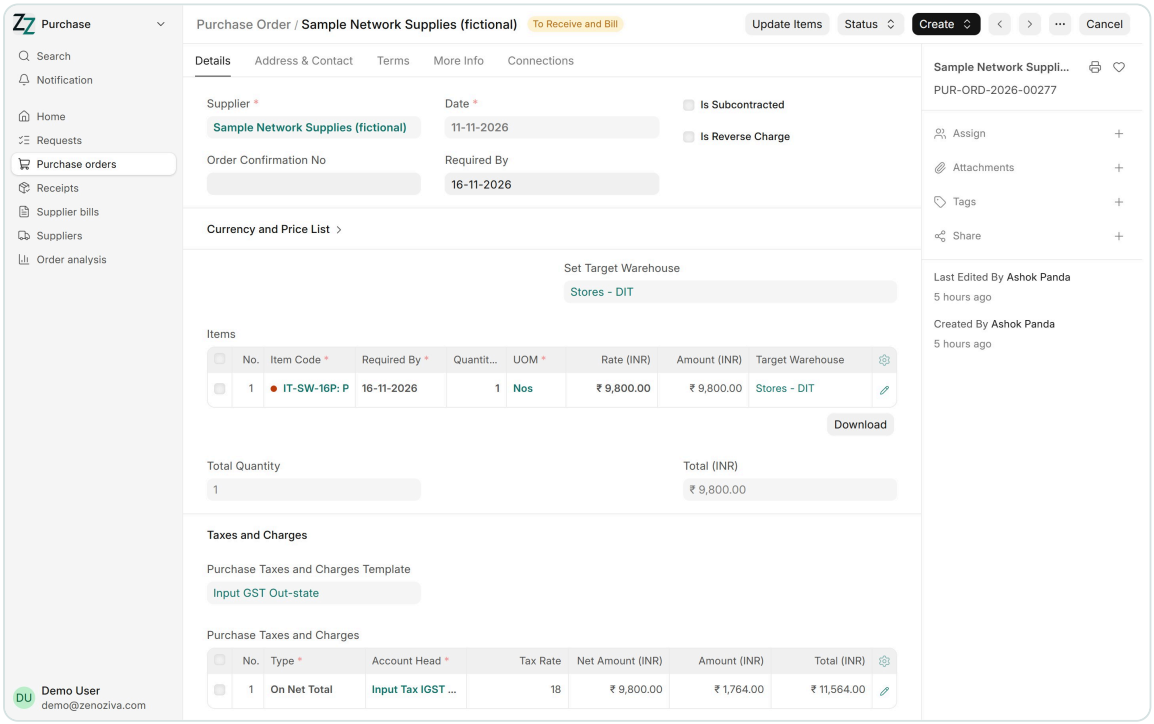
4.2 Purchase request

Made from a sales order (**Create** › **Material Request**) or by the storekeeper: which items, how many, by when. Its status turns to **Ordered** once purchase orders cover it.



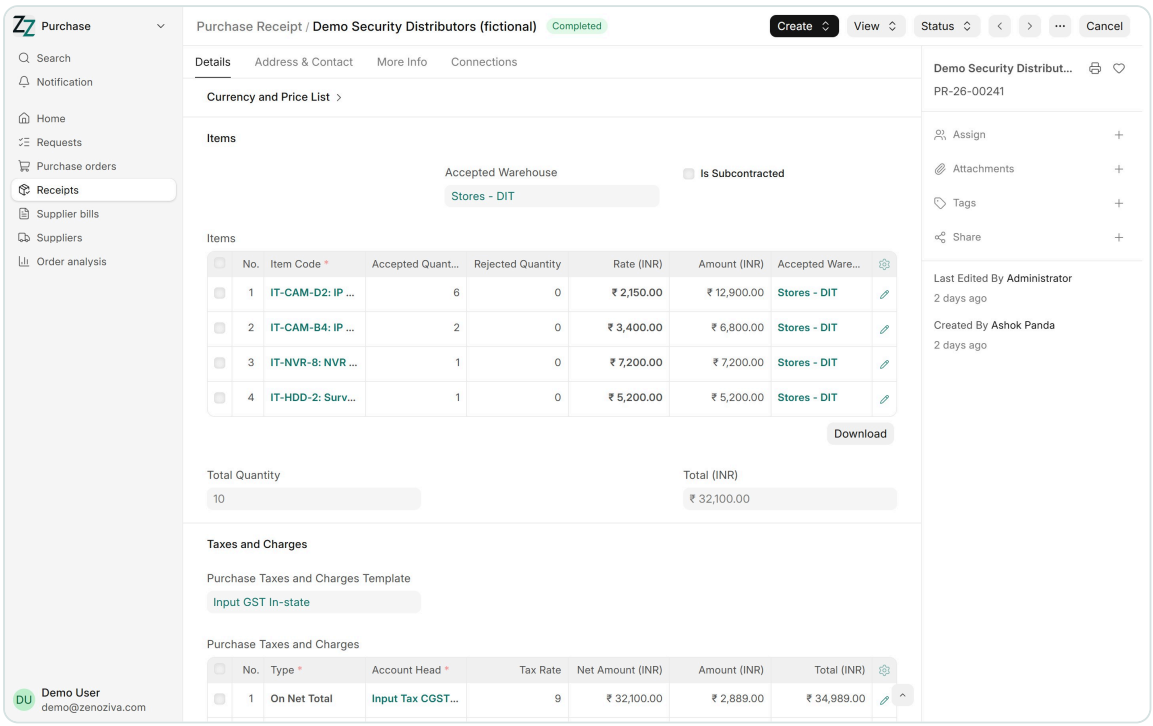
4.3 Purchase order

From the request, **Create** › **Purchase Order**, one per distributor. A distributor in another state gets IGST (**Input GST Out-state**); one in your state gets CGST and SGST. Print or email it like a quotation.



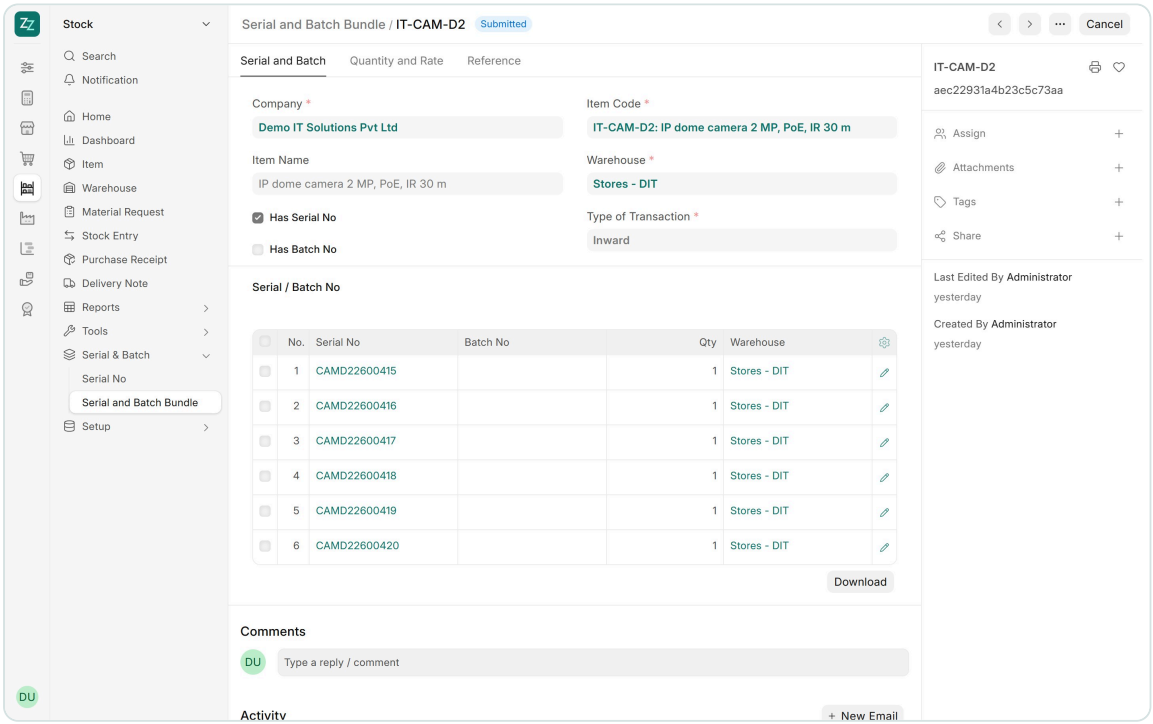
4.4 Receive the goods

When the stock arrives, **Create** › **Purchase Receipt** from the order. Quantities and prices are copied; change them if the delivery differs. Serialised items need a serial number for each unit: typed, scanned, or made by the system.



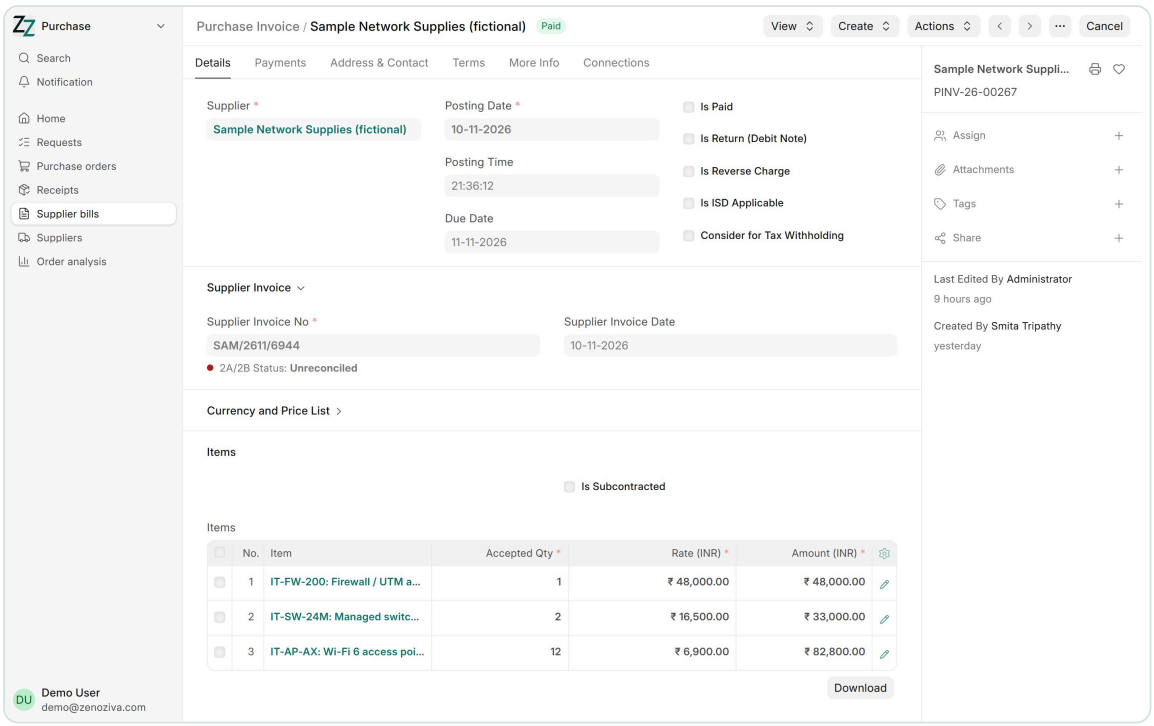
4.5 Serial numbers on the receipt

Each serialised line keeps its list of serial numbers. From now on every one of these cameras can be traced: where it came from, where it went, and when its warranty ends.



4.6 The distributor’s bill

Create › **Purchase Invoice** from the receipt. Enter the distributor's **Supplier Invoice No** and date: GST input credit is matched against them, and the **2A/2B Status** shows whether the bill appears in your GSTR-2B. Subcontractors' bills deduct TDS by themselves.



CHAPTER 5

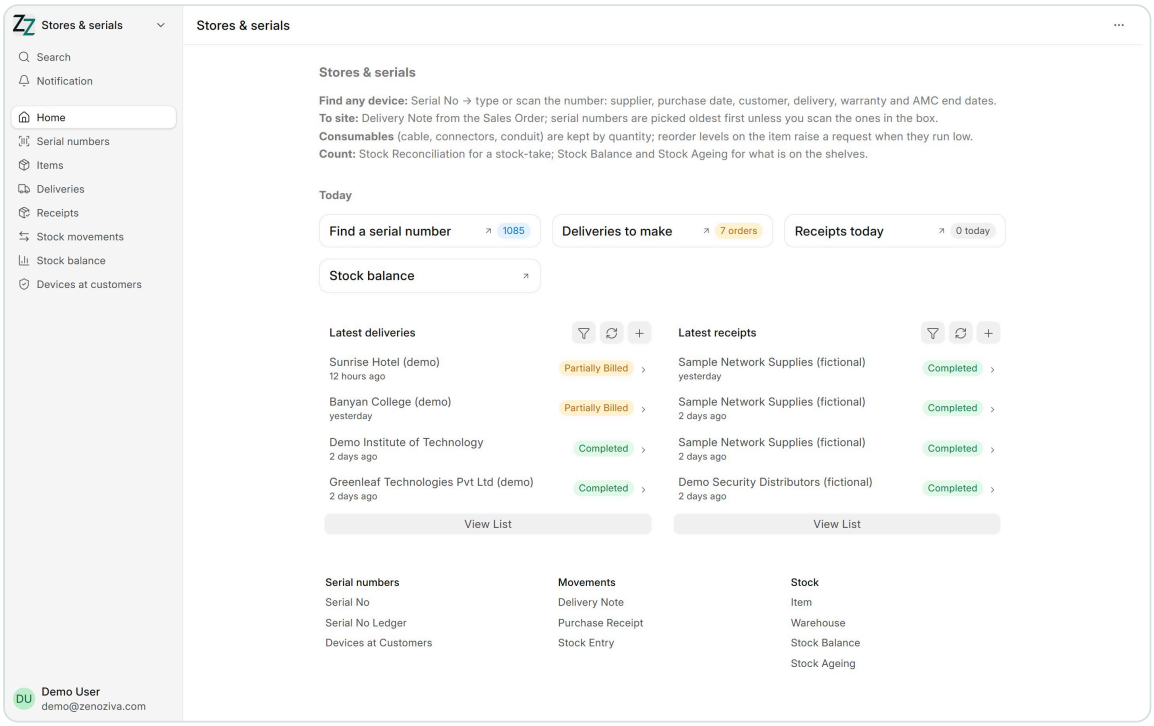
Stores & serials

For: Storekeeper

Every camera, NVR, switch, UPS and PC is tracked by serial number from the distributor to the customer's site. Cable, connectors and conduit are kept by quantity.

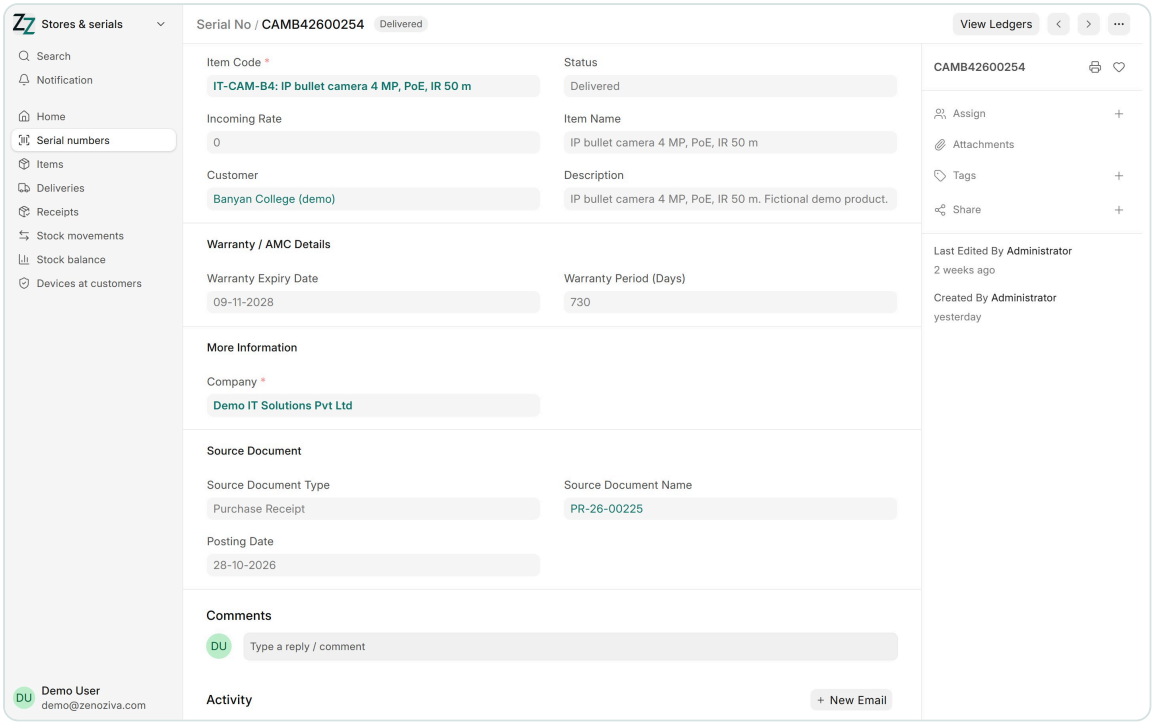
5.1 The Stores & serials menu

Find a serial number, **Deliveries to make**, receipts today and stock levels, with the latest deliveries and receipts.



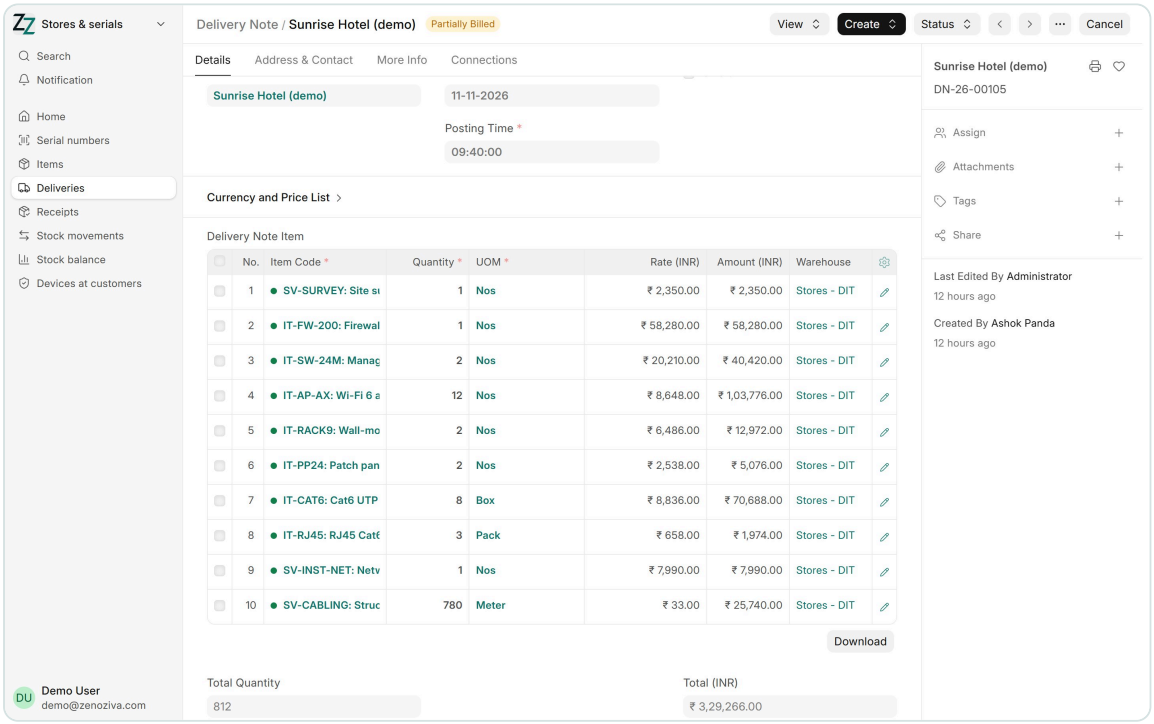
5.2 Find any device

Type or scan a serial number: the item, its status (**Delivered**), the customer, the **Warranty Expiry Date**, and the receipt it came in on. **View Ledgers** shows every movement of that unit.



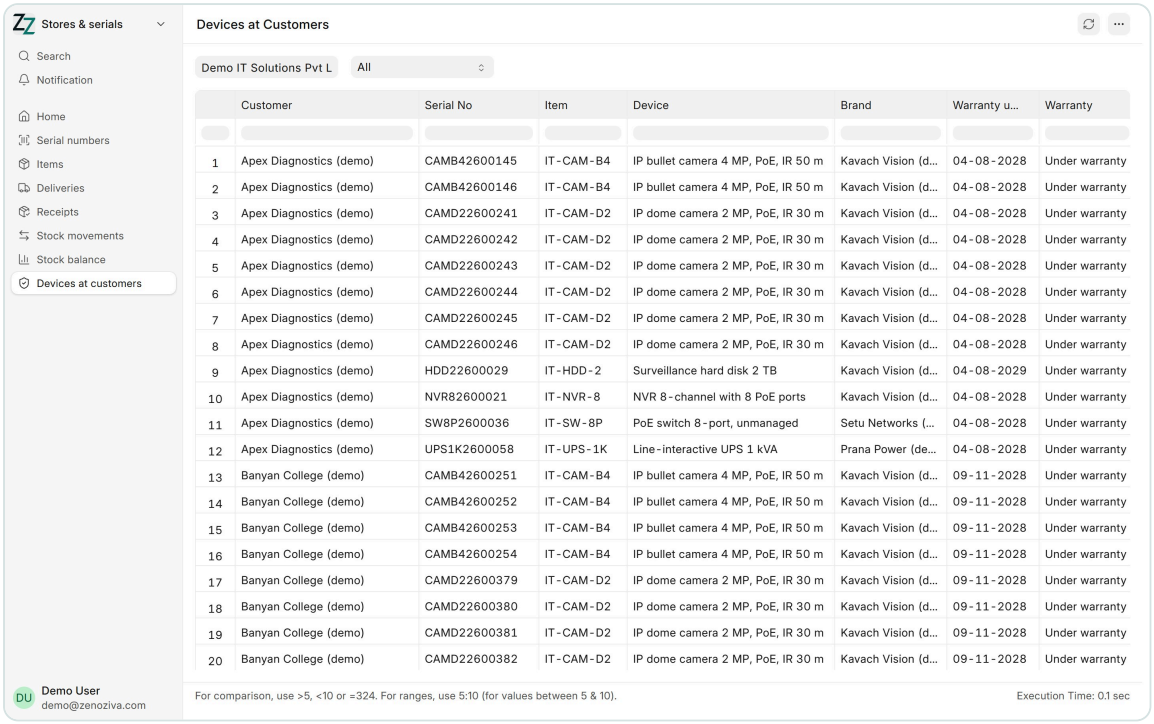
5.3 Deliver to site

From the sales order, **Create** › **Delivery Note**. Serial numbers are picked oldest first unless you scan the ones in the box. The supply invoice (and its e-way bill) is made from the delivery.



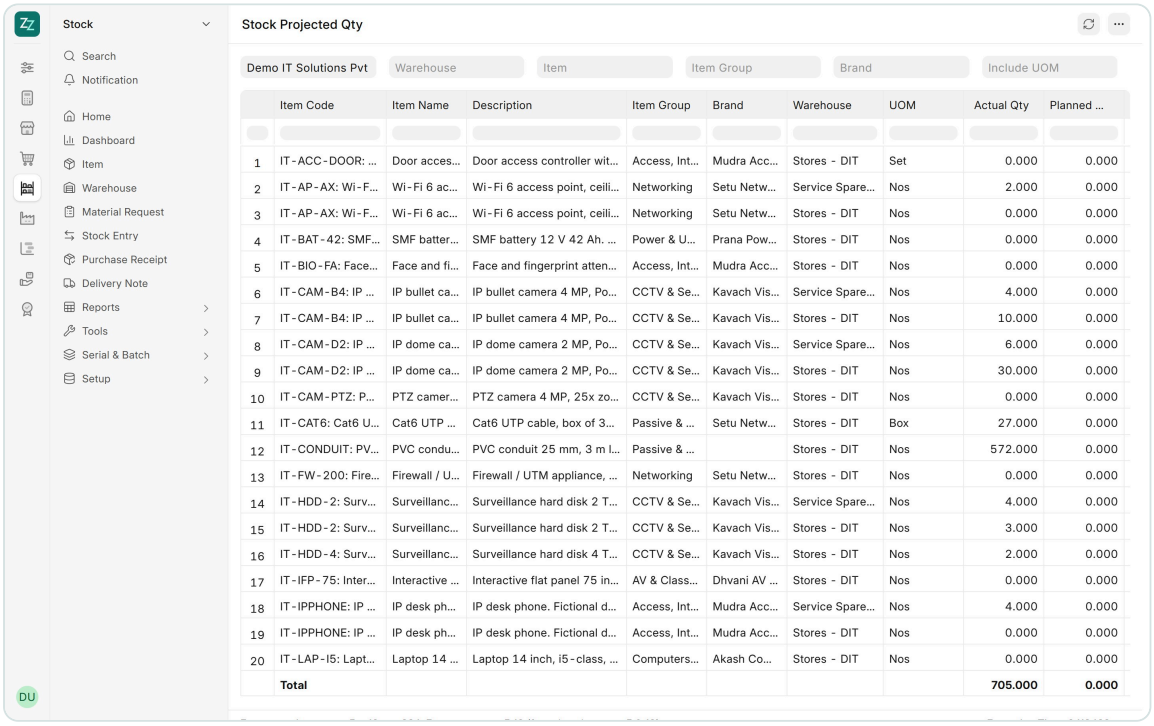
5.4 Devices at customers

Everything installed at each customer, with serial number, brand and warranty end date. Filter by customer before an AMC visit or a renewal call.



5.5 Stock levels

What is on the shelves in each store, what is on order and what is reserved for orders. Reorder levels on an item raise a purchase request when it runs low.



CHAPTER 6

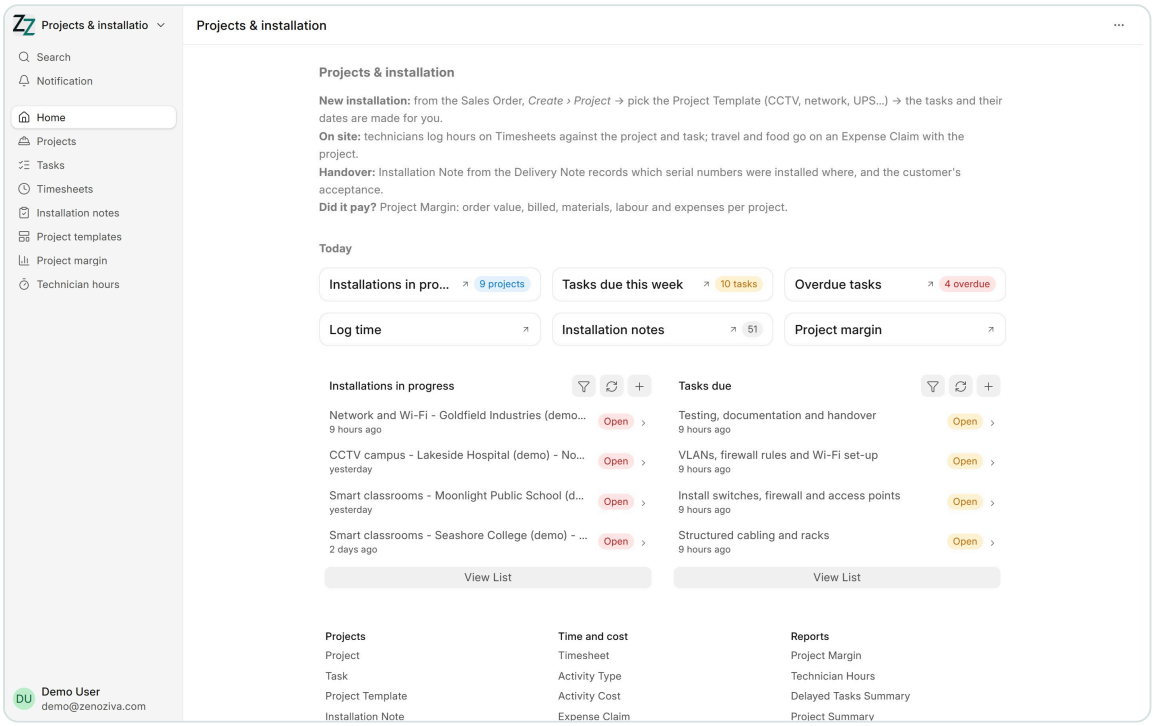
Projects & installation

For: Project manager, site engineers

Each order becomes a project with its tasks from a template, the technicians' hours, the handover note and, at the end, the margin it made.

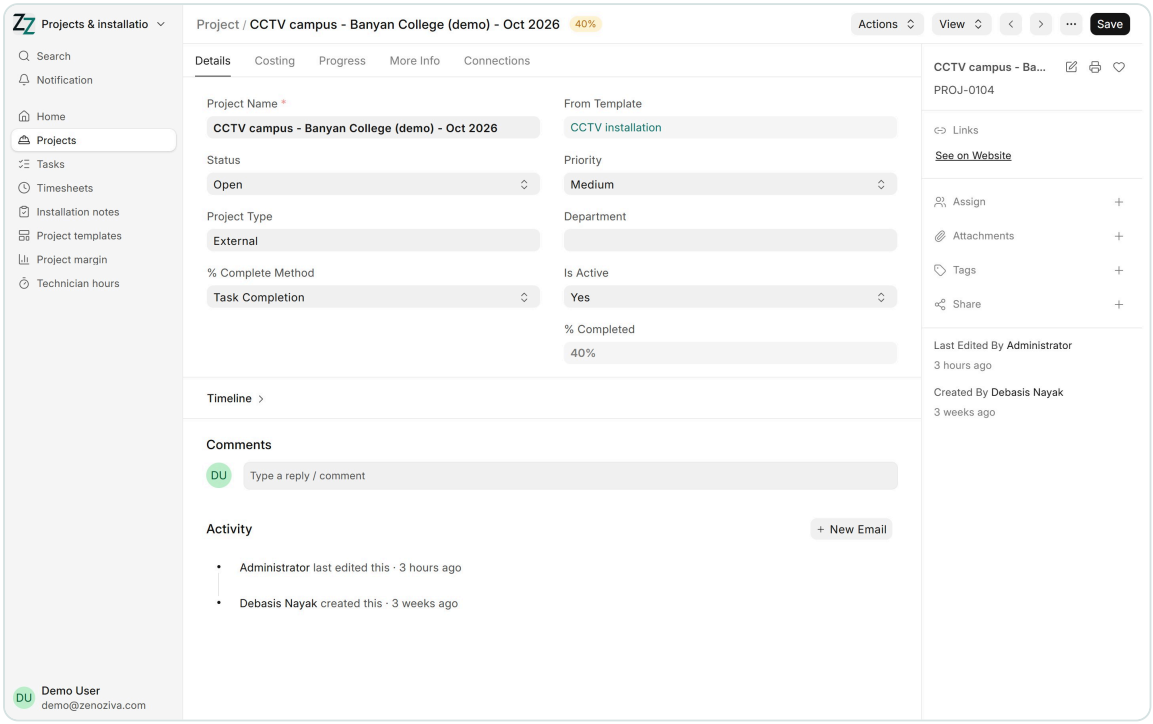
6.1 The Projects & installation menu

Installations in progress, **Tasks due this week**, **Overdue tasks** and **Log time**, with installation notes and the project margin.



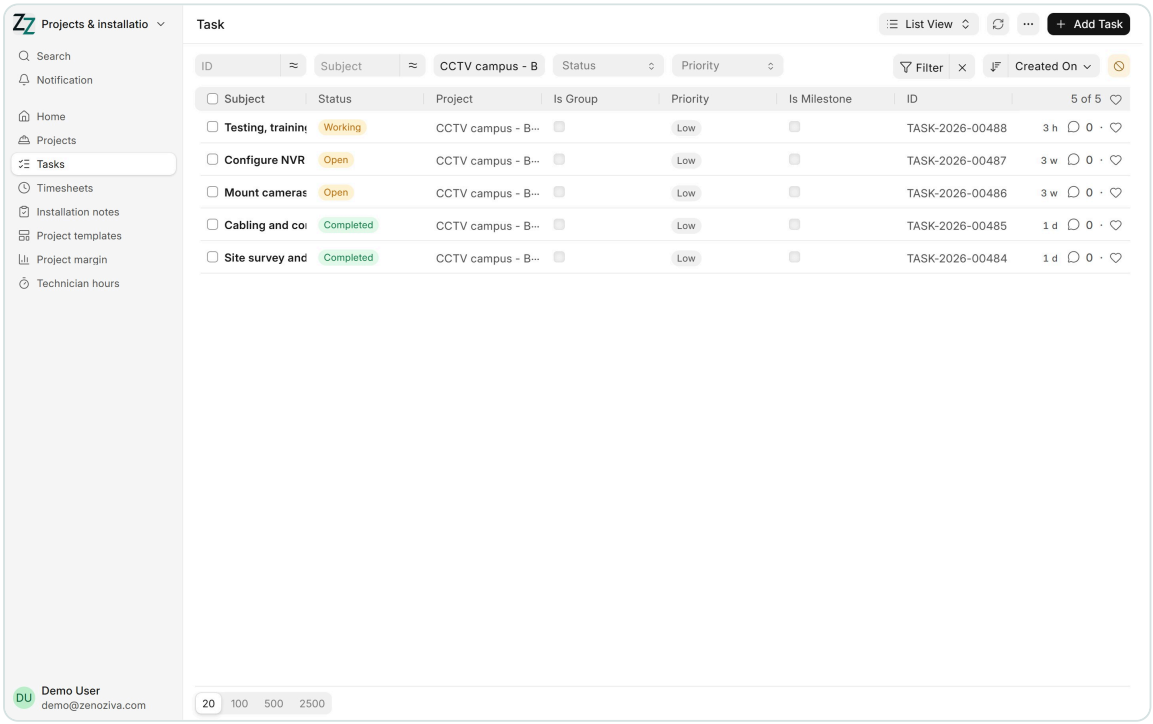
6.2 A project from a template

From the sales order, **Create** › **Project** and pick a template (**CCTV installation** here). Its tasks are made for you, and **% Completed** follows them.



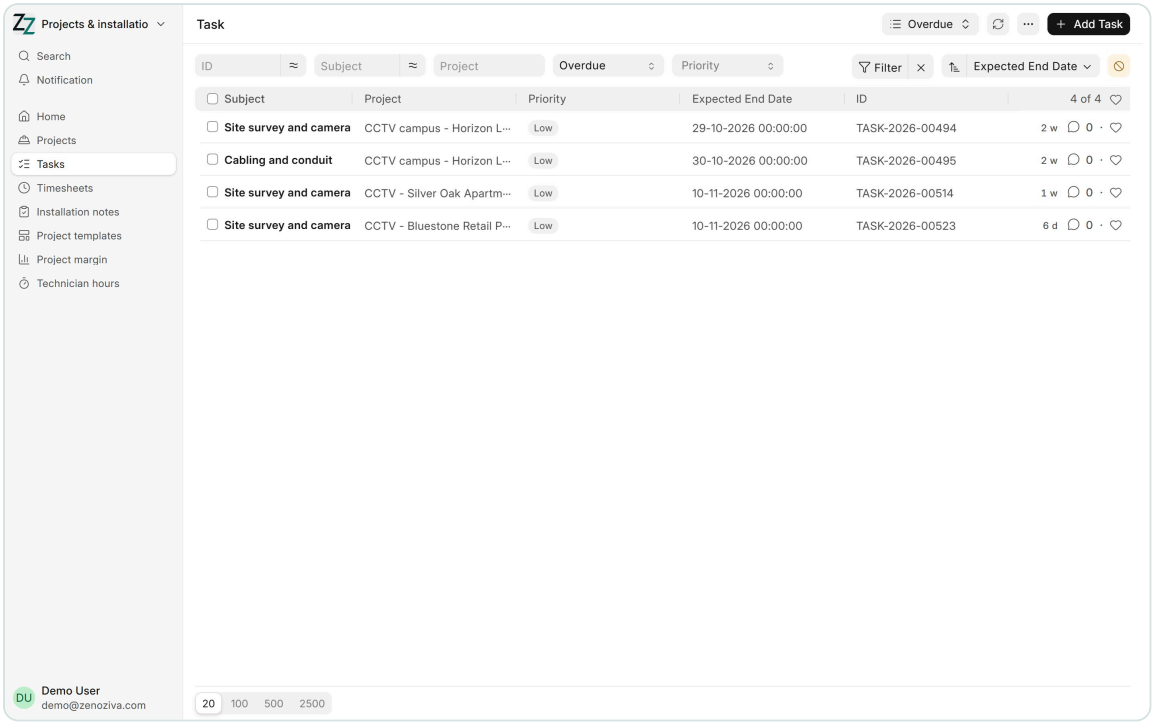
6.3 The project's tasks

Site survey, cabling, mounting, configuration, testing and handover: each task has a status, an owner and dates. Technicians mark them done as they go.



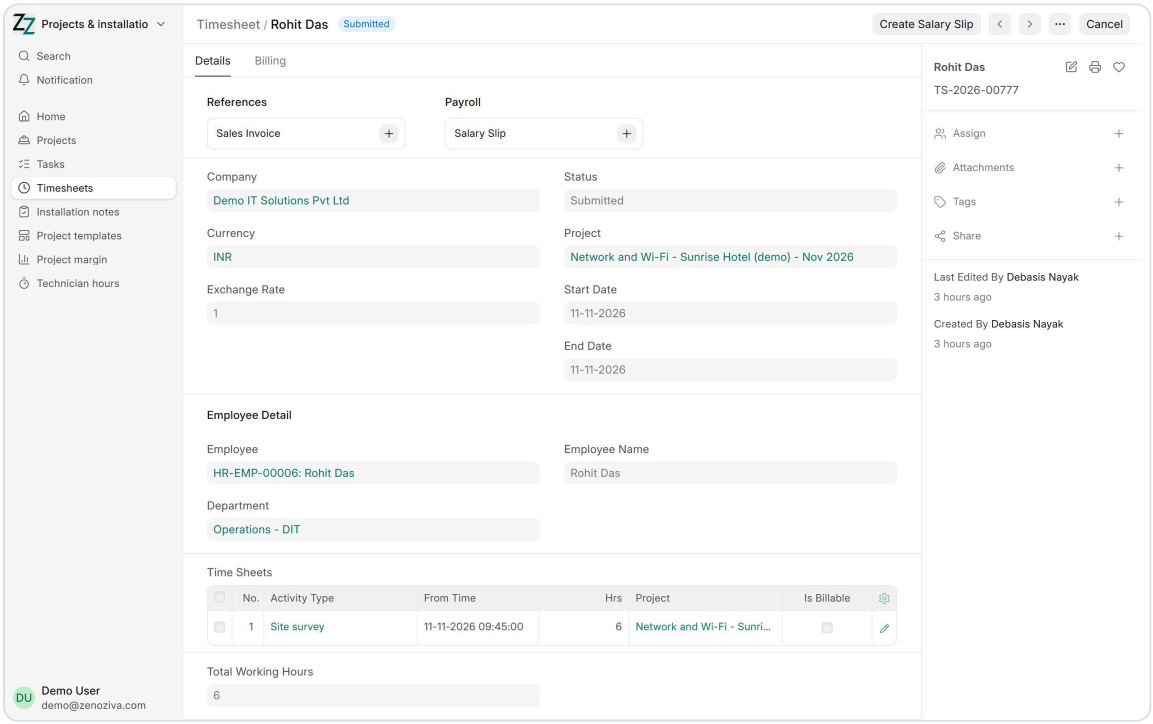
6.4 Overdue tasks

Tasks past their end date turn **Overdue** and show on the Business overview. Open one to see who has it and why it is held up.



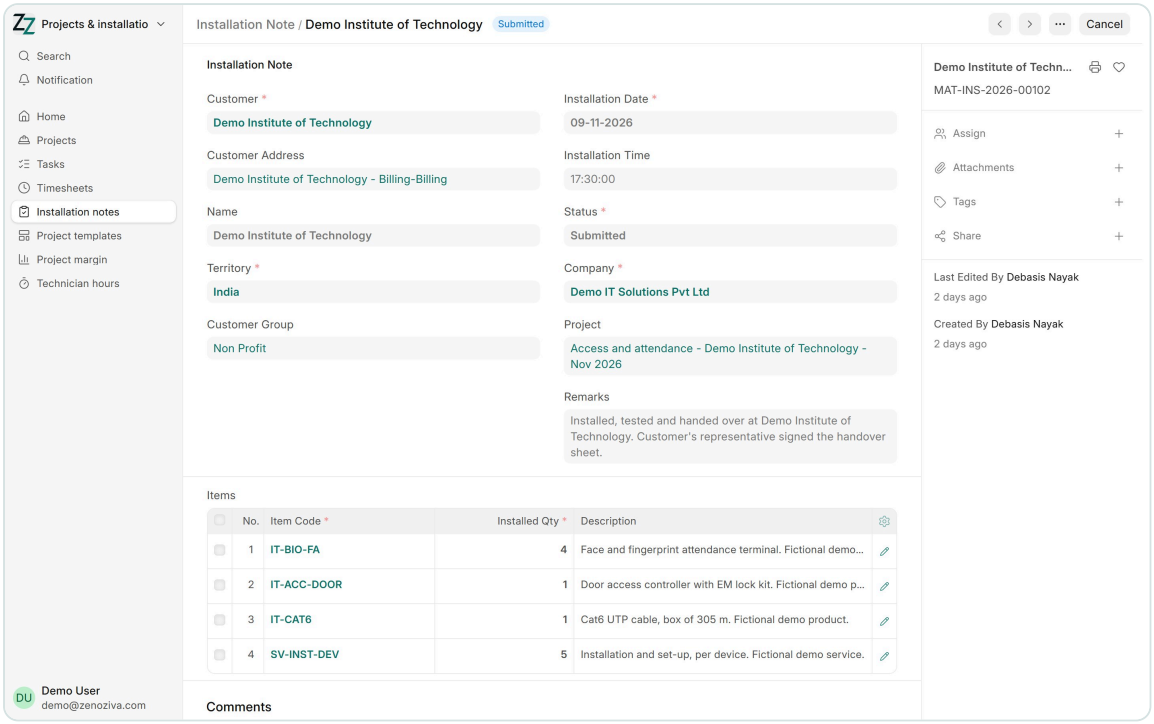
6.5 Technicians' timesheets

Hours on site go on a timesheet against the project and the activity (survey, cabling, installation). They become the labour cost in Project Margin.



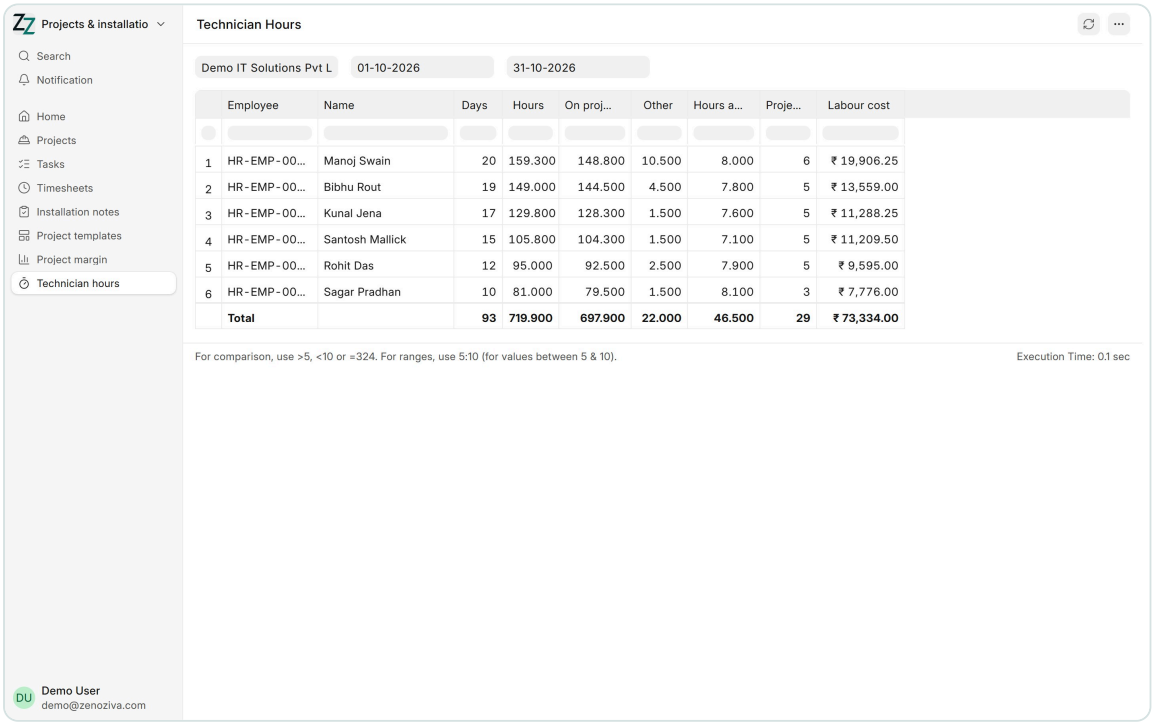
6.6 Handover: the installation note

From the delivery note, **Create** › **Installation Note**: what was installed, where, on which date, and the customer's acceptance in **Remarks**.



6.7 Technician hours

Each technician's days, hours on projects and other work, hours a day, number of projects and labour cost for the month.



CHAPTER 7

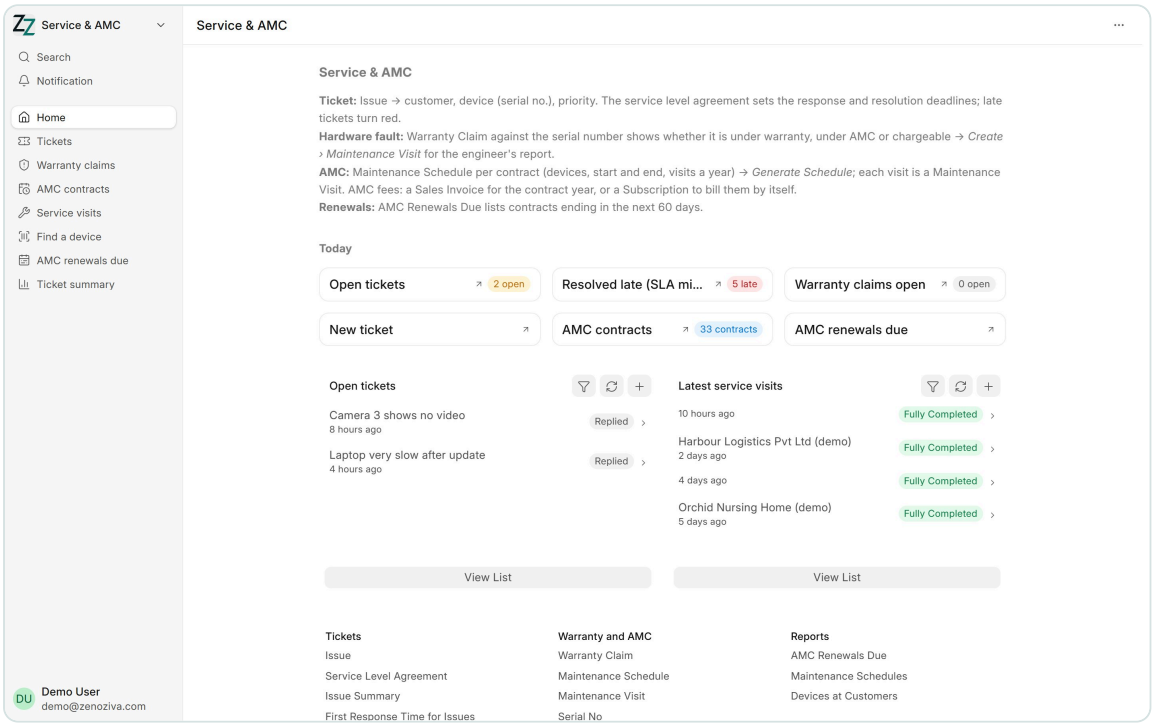
Service & AMC

For: Service desk, service engineers

Tickets with response and resolution deadlines, warranty claims against a serial number, and AMC contracts with their scheduled visits and renewals.

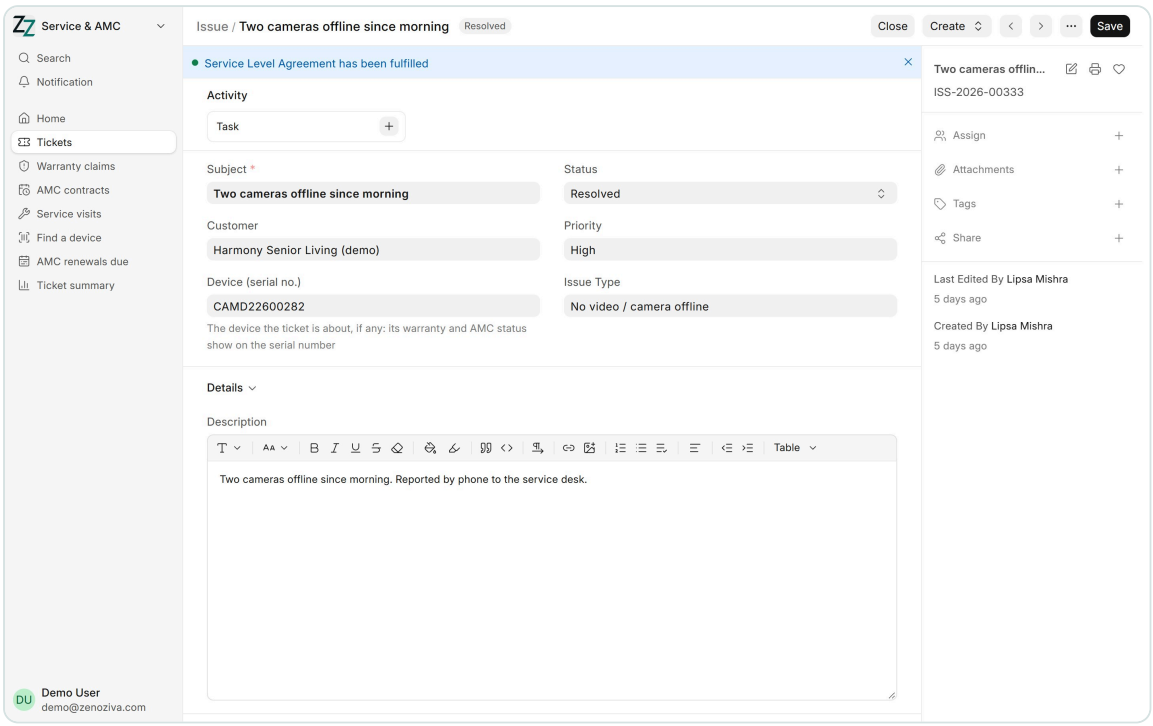
7.1 The Service & AMC menu

Open tickets, tickets **Resolved late (SLA missed)**, open warranty claims, **New ticket**, **AMC contracts** and **AMC renewals due**.



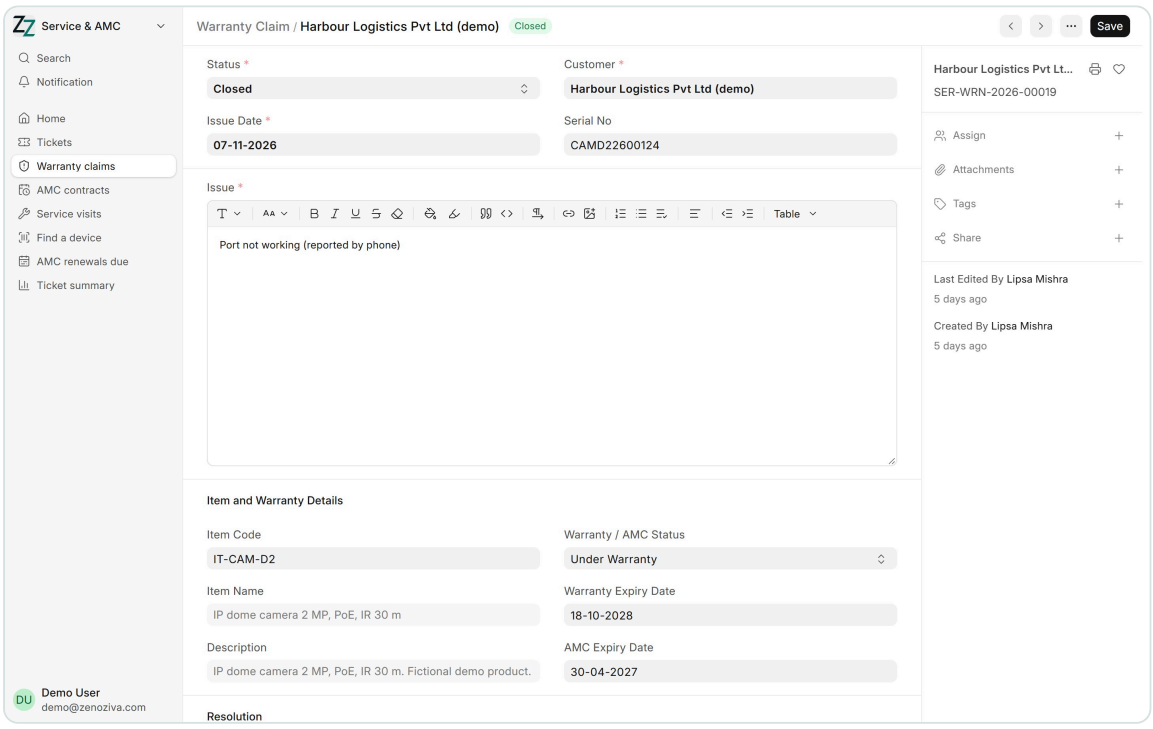
7.2 A support ticket

Customer, **Device (serial no.)**, **Priority** and **Issue Type**. The service level agreement sets the response and resolution deadlines from the priority; the banner shows whether they were met. **Close** when the customer confirms.



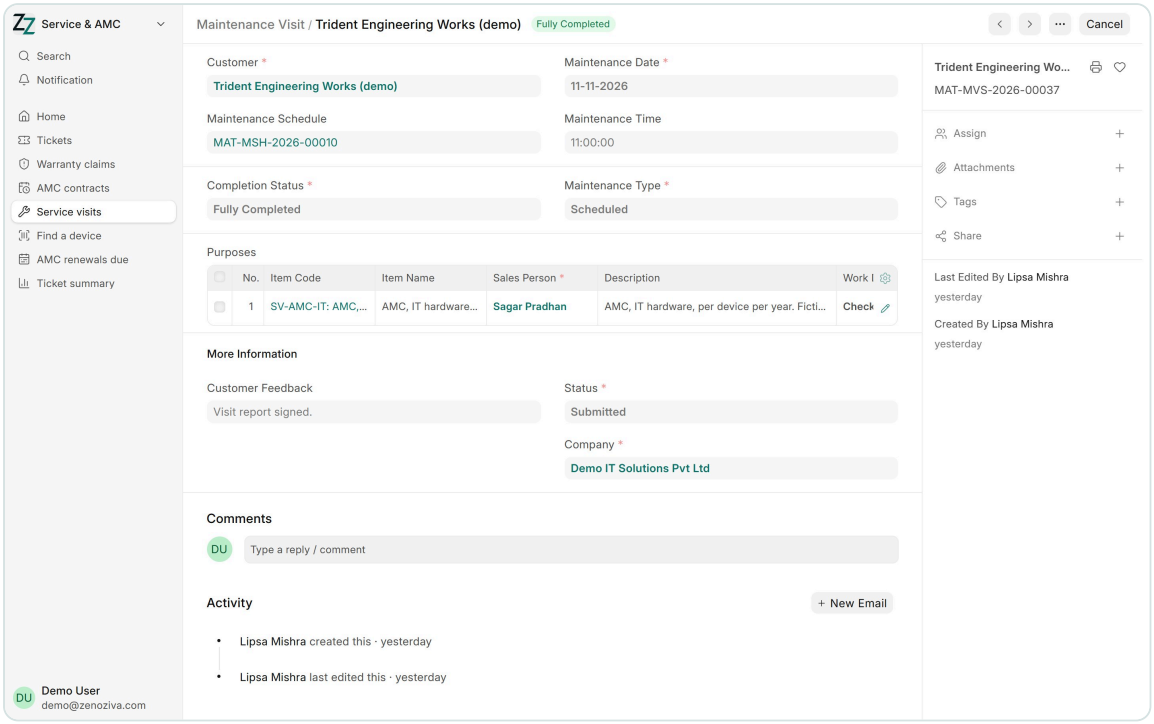
7.3 Warranty claim

A hardware fault against a serial number: the item, its **Warranty Expiry Date** and **AMC Expiry Date** fill in from the device, and **Warranty / AMC Status** says at once whether the repair is under warranty, under AMC or chargeable.



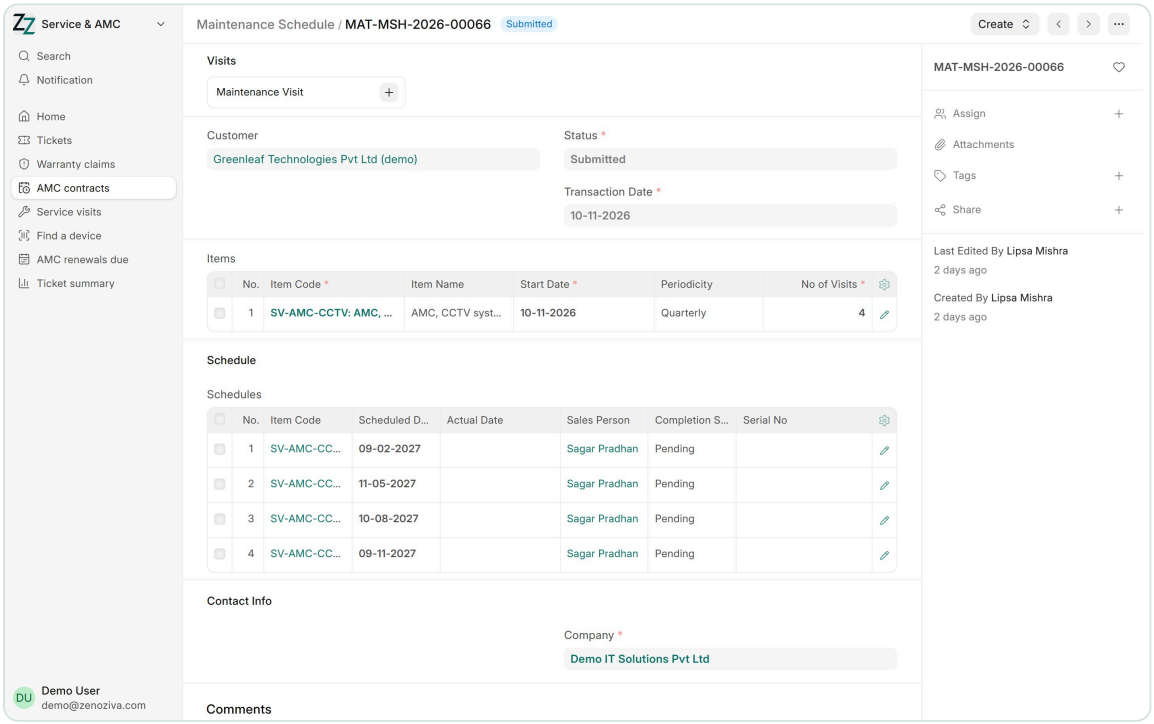
7.4 Service visit

The engineer's visit report: what was done, on which device, and whether the problem is solved. Made from a warranty claim or an AMC contract.



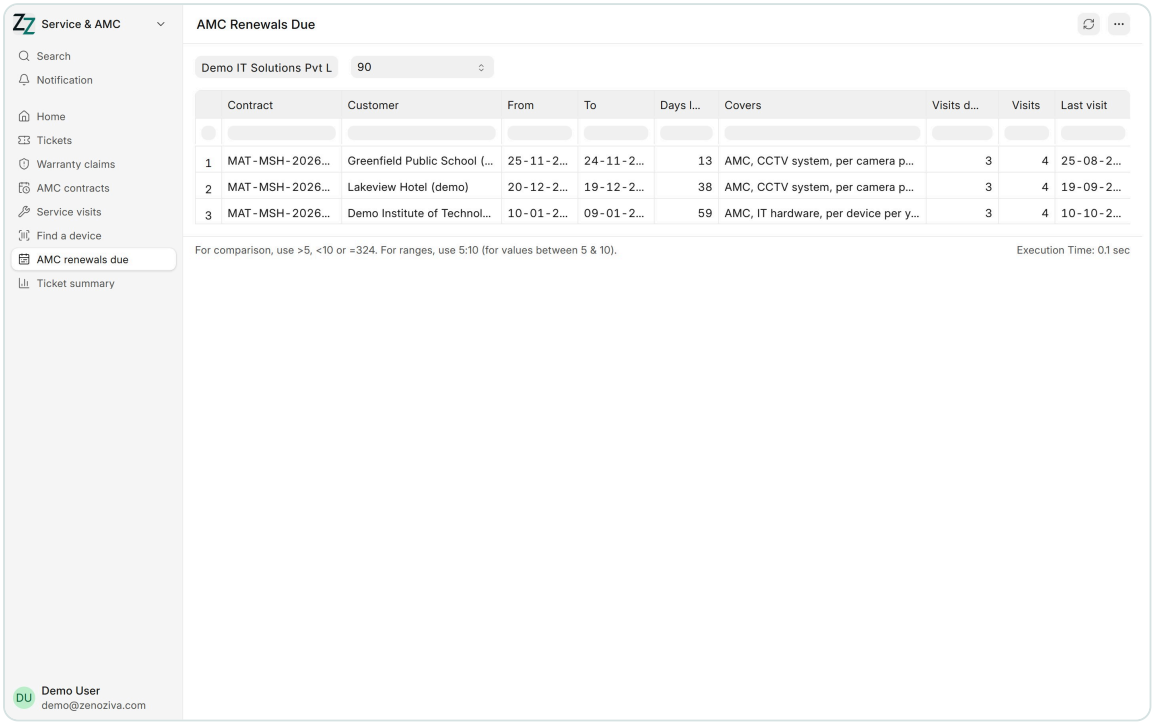
7.5 AMC contract

Which services and devices are covered, from when, how often (**Quarterly** here, 4 visits) and by whom. The schedule lists every visit date; each visit is marked done as it happens.



7.6 AMC renewals due

Contracts ending in the next 60 or 90 days, with days left, what they cover and visits done: your renewal calls for the month.



CHAPTER 8

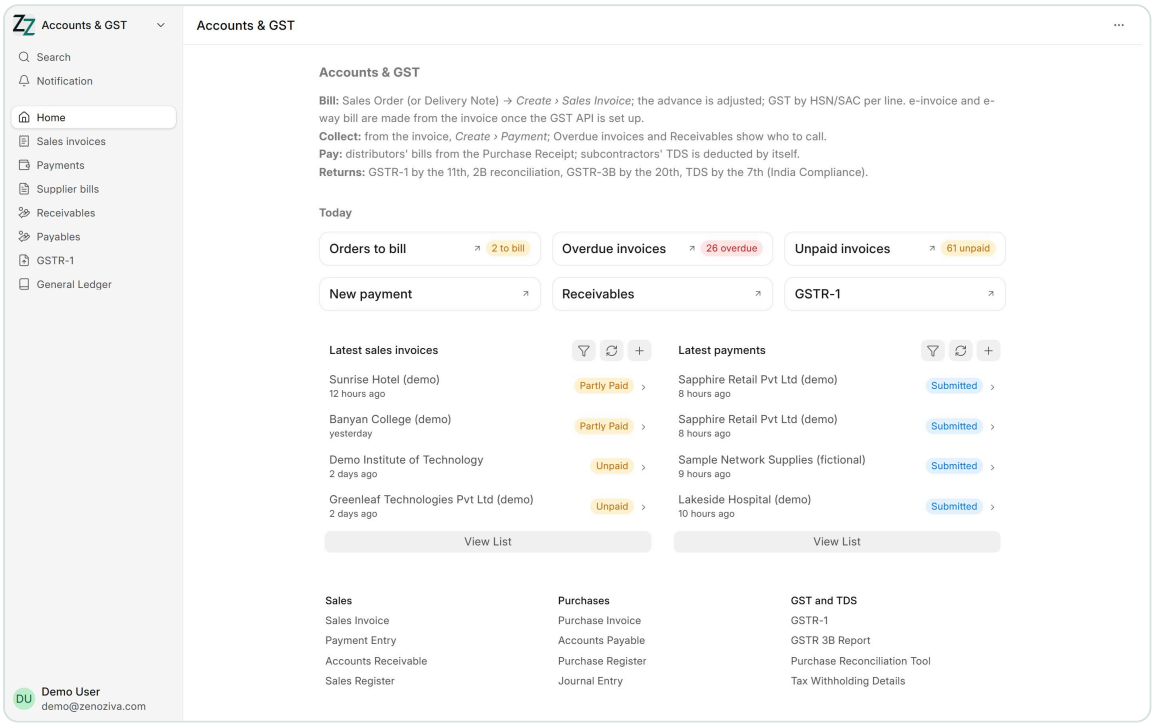
Accounts & GST

For: Accountant

Invoice supply at delivery and installation at handover, collect against invoices, pay distributors, and prepare GST returns.

8.1 The Accounts & GST menu

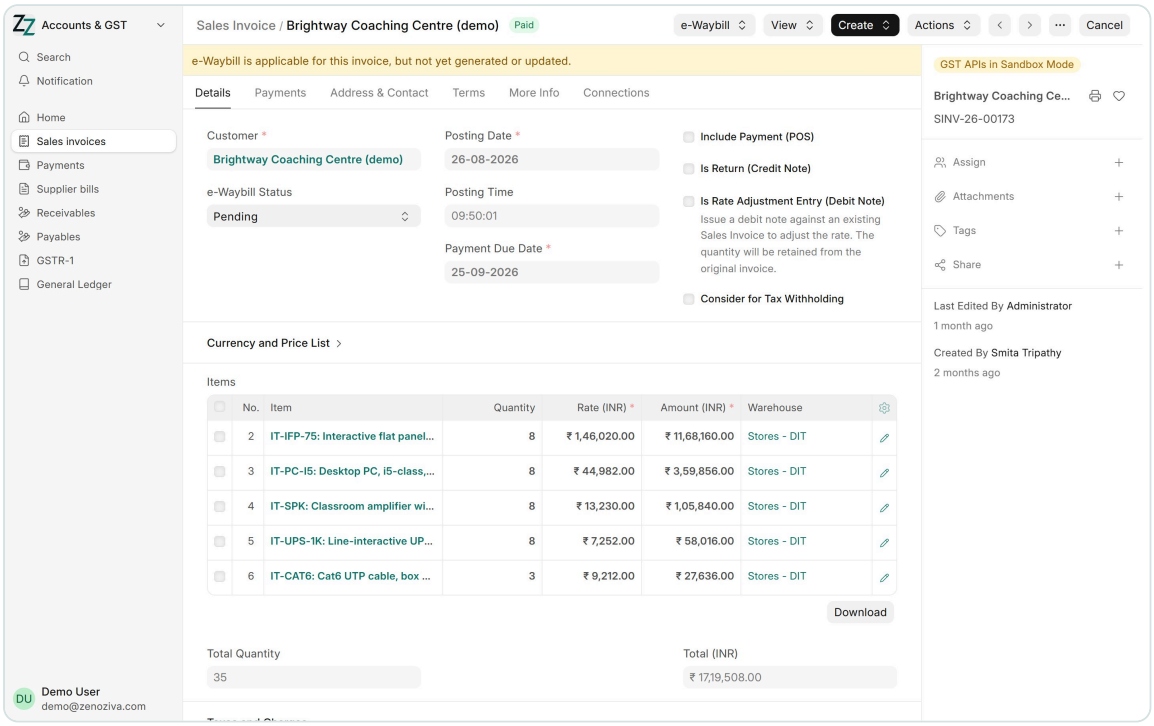
Orders to bill, Overdue invoices, Unpaid invoices, New payment, Receivables and GSTR-1.



8.2 Sales invoice

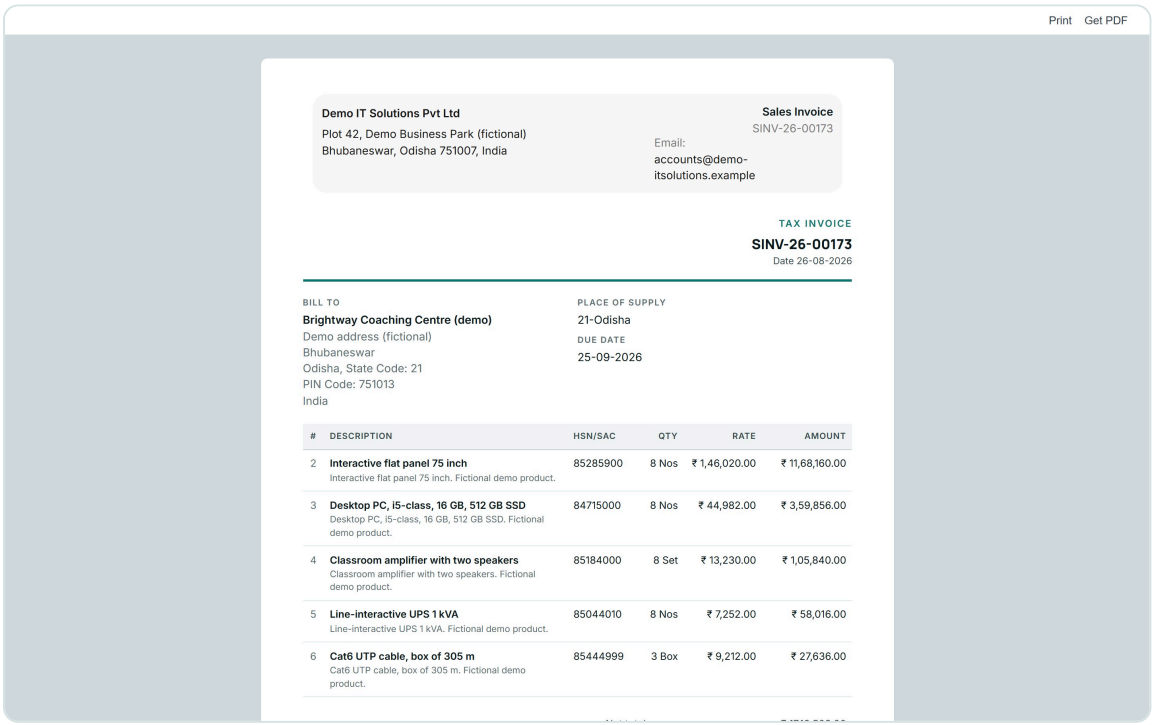
From the sales order or delivery note, **Create** › **Sales Invoice**. GST comes from each item's HSN or SAC code; an advance already received is adjusted. The banner reminds you when an e-way bill is due.

> e-invoice and e-way bill are made from the invoice once your GST API account is connected (pay per use). On the demo the GST connection is in test mode.



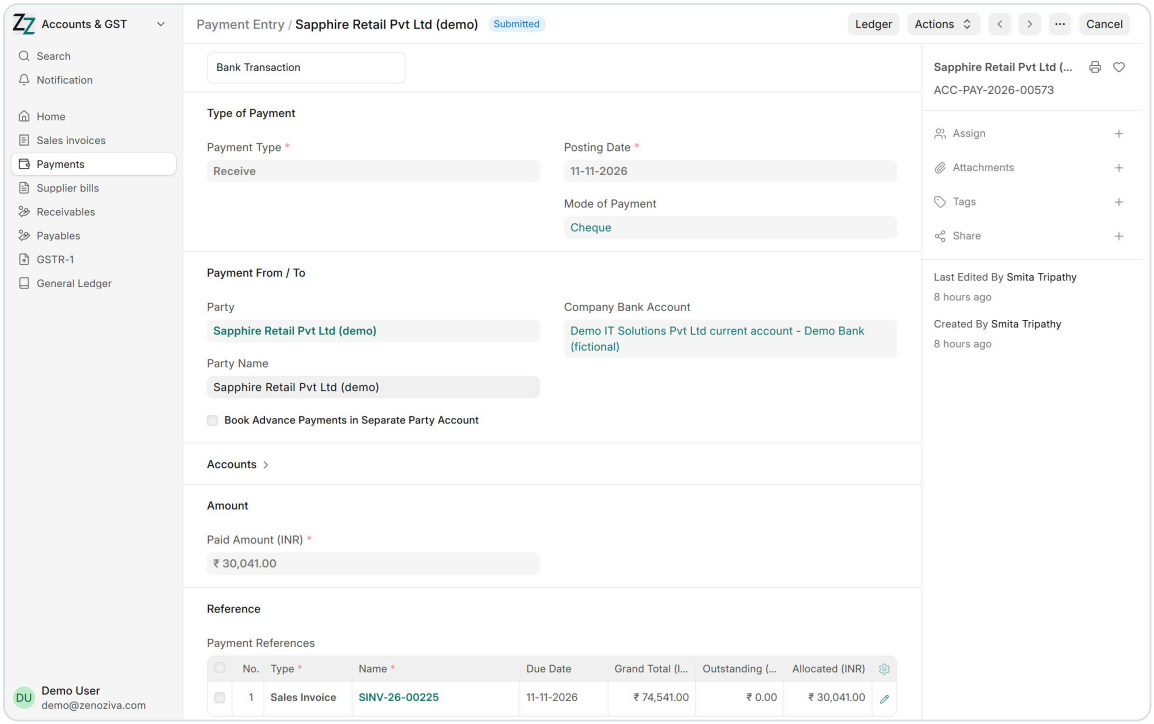
8.3 The invoice on your letterhead

Tax invoice with GSTIN, HSN/SAC, tax per line and totals, ready to print or send.



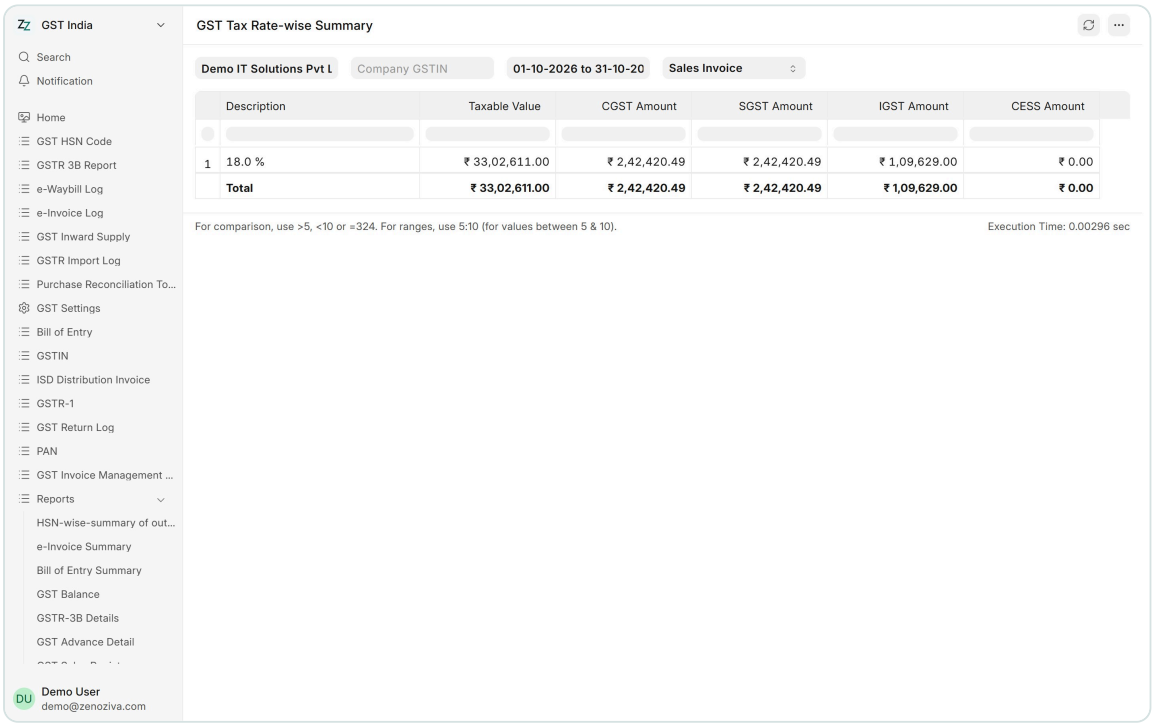
8.4 Record a payment

From the invoice, **Create** › **Payment**: the bank account, mode and amount. **Payment References** shows which invoices it settles; part-payments leave the rest outstanding.



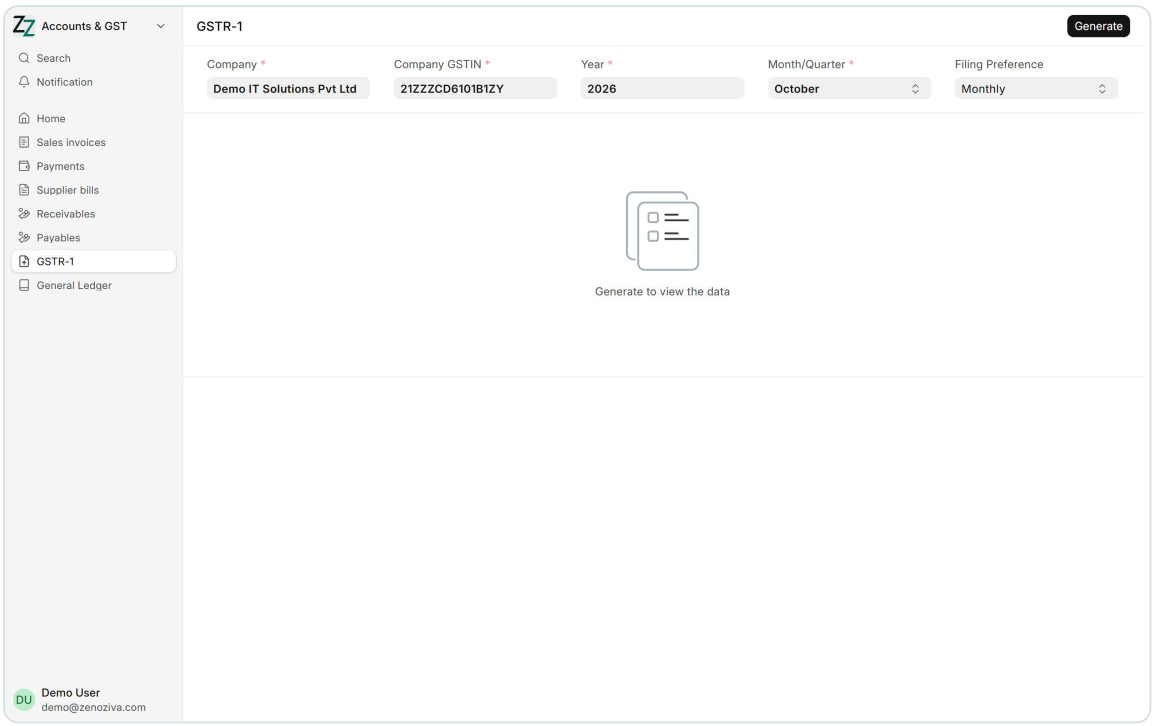
8.5 GST summary

Taxable value with CGST, SGST and IGST by rate for a month: a quick check before filing.



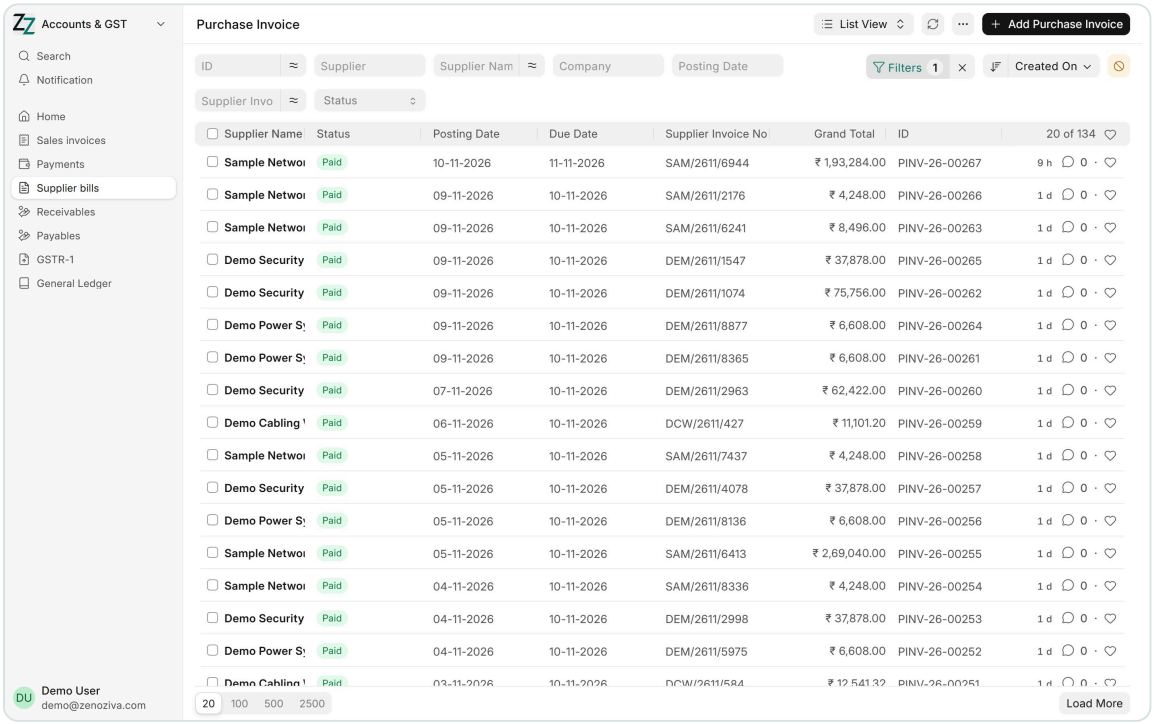
8.6 GSTR-1

Choose the month and **Generate**: outward supplies are grouped the way the GST portal needs them, ready to download for filing. GSTR-3B and the 2B reconciliation are linked from the Accounts & GST menu.



8.7 Supplier bills

Every distributor's and subcontractor's bill with its status: paid, unpaid or overdue. Pay from the bill with **Create** › **Payment**; **Payables** in the sidebar shows what you owe each supplier, by age.



CHAPTER 9

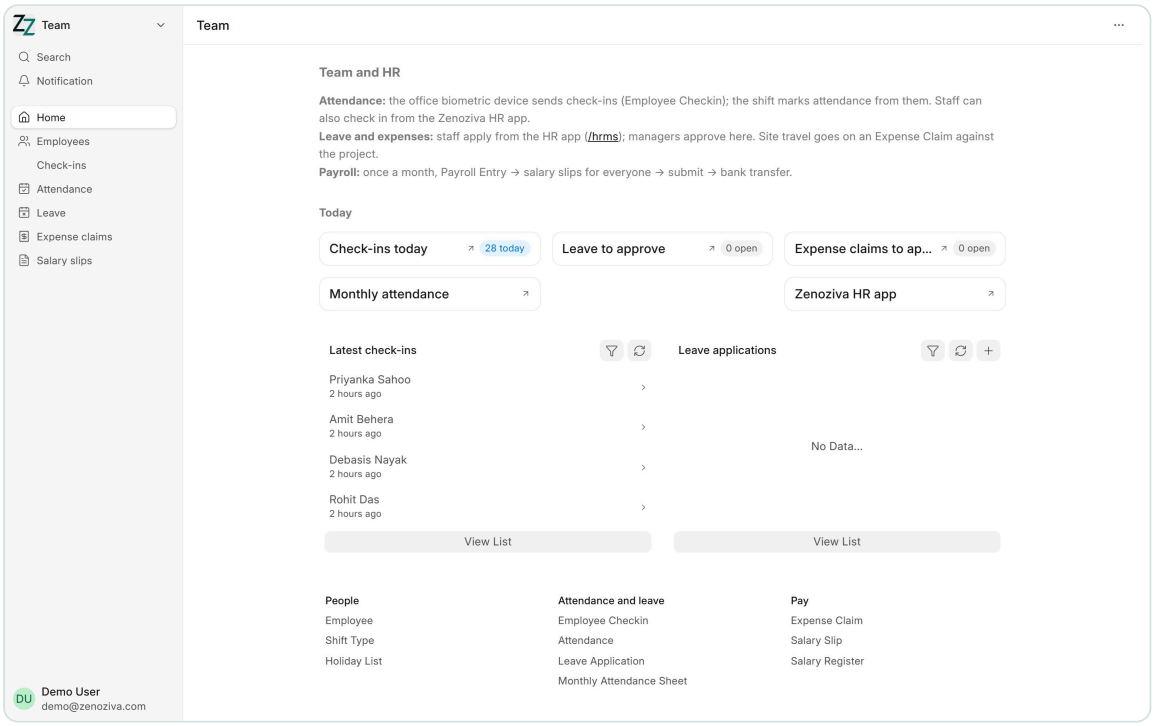
Team, attendance and payroll

For: HR, managers

Check-ins from the biometric device and the phone, attendance by shift, leave, site-travel expenses and monthly payroll.

9.1 The Team menu

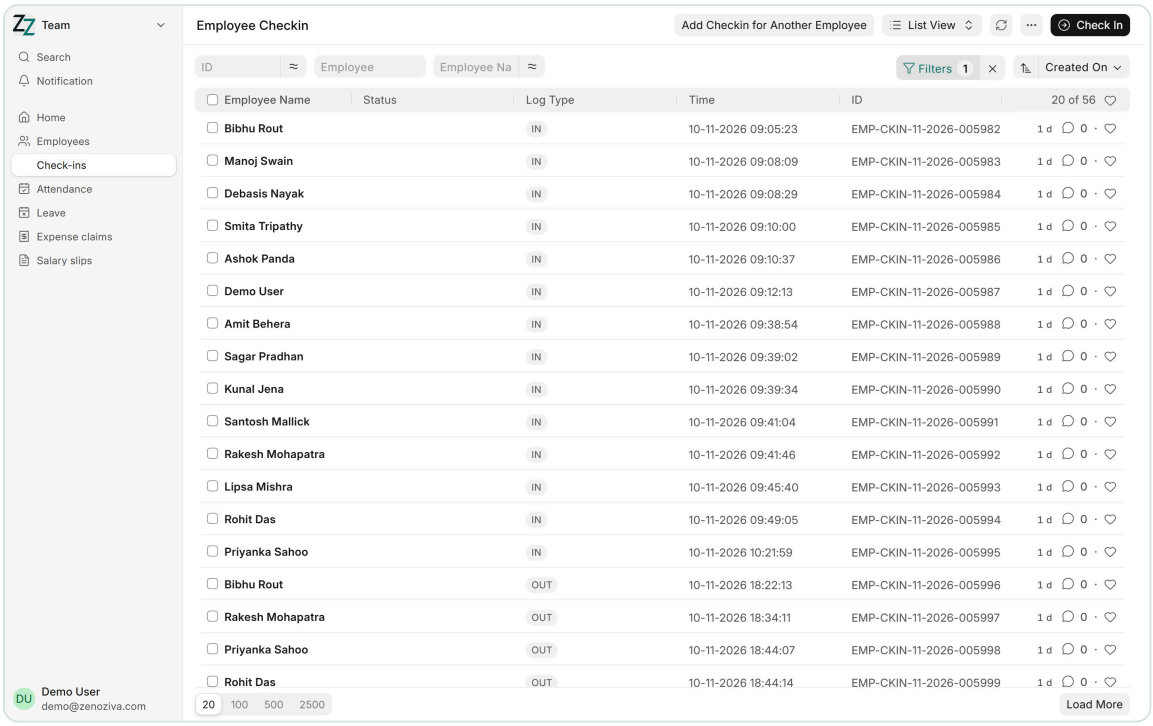
Check-ins today, Leave to approve, Expense claims to approve, Monthly attendance and a link to the Zenoziva HR app.



9.2 Check-ins

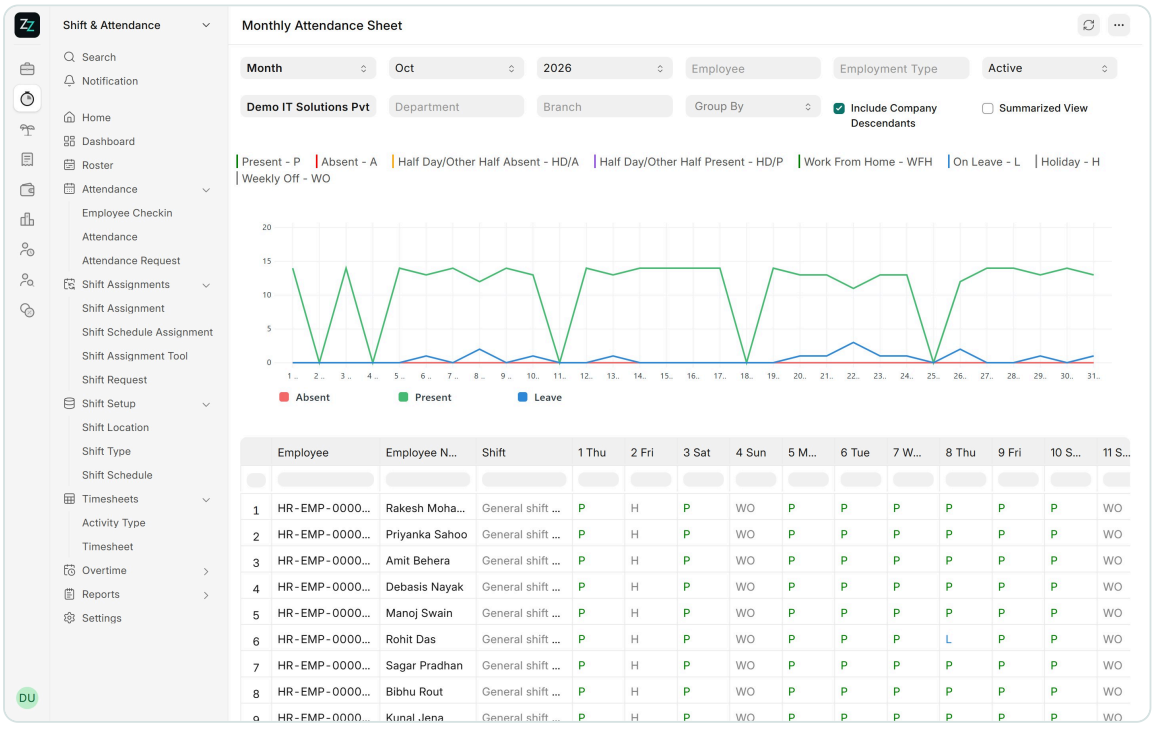
Every punch from the office biometric device or the HR app, with time and direction. The shift turns them into attendance by itself.

> The biometric device sends check-ins through its own connection, set up with your device. On the demo they are written directly.



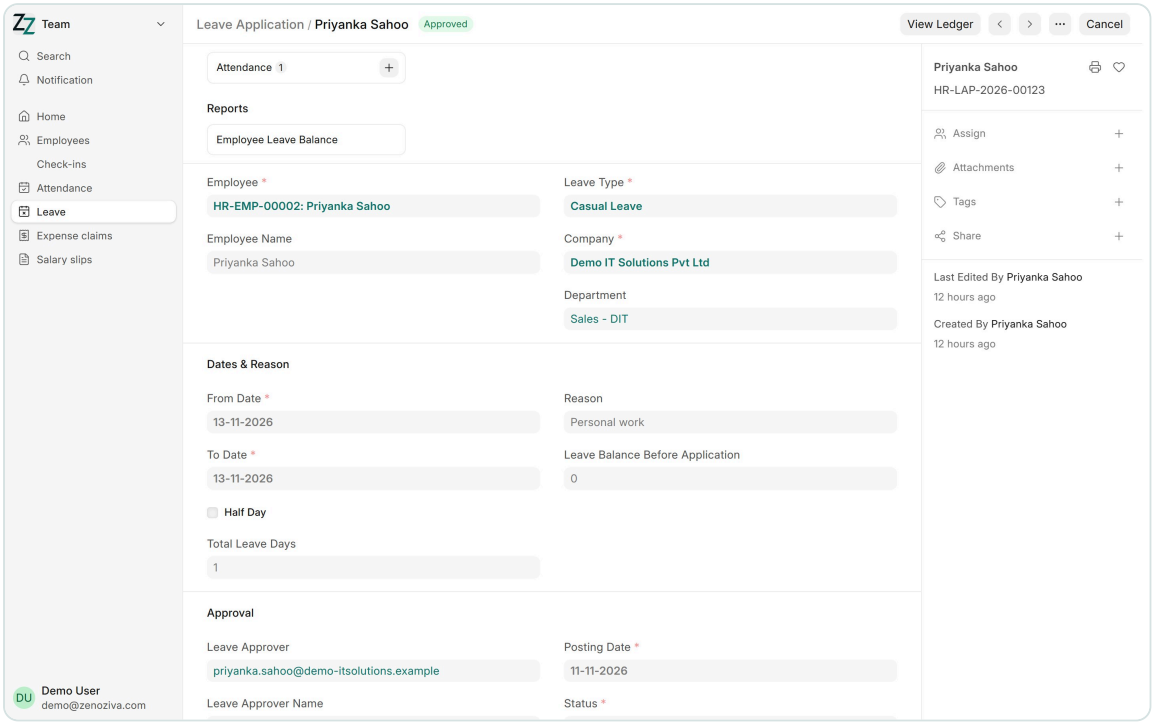
9.3 Monthly attendance

One row per employee, one column per day: present, holiday, weekly off and leave, with a chart of the month.



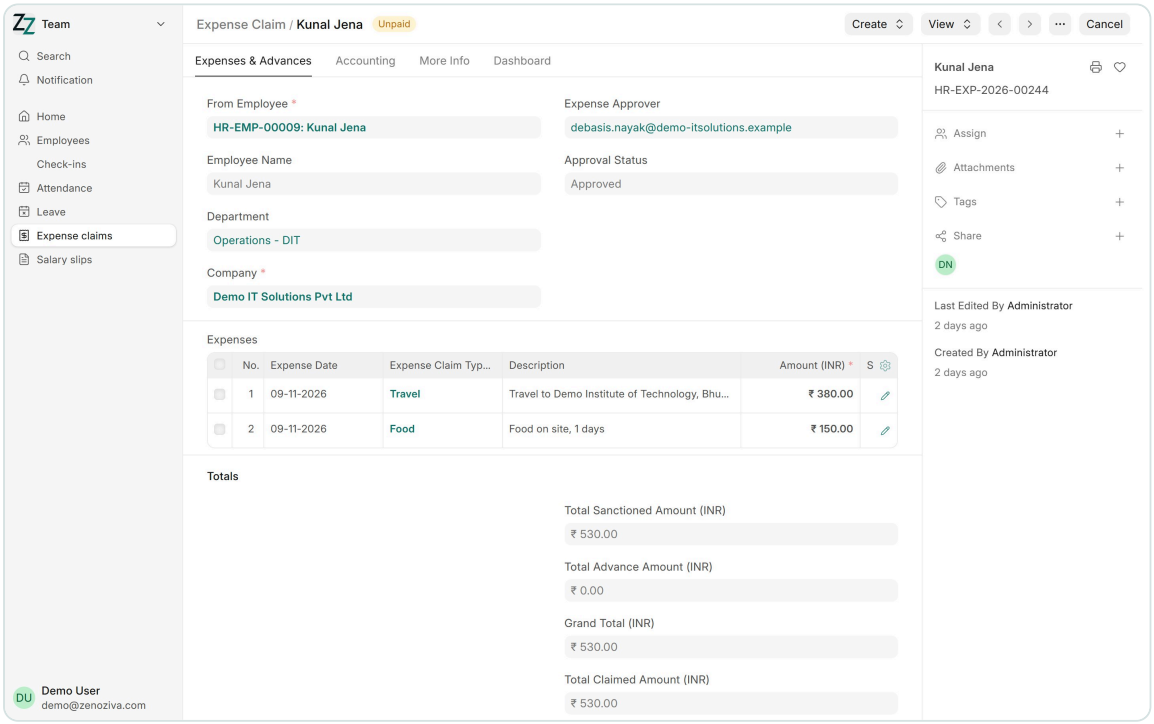
9.4 Leave

Staff apply from the HR app; the leave approver approves here or in the app. Balances update by themselves.



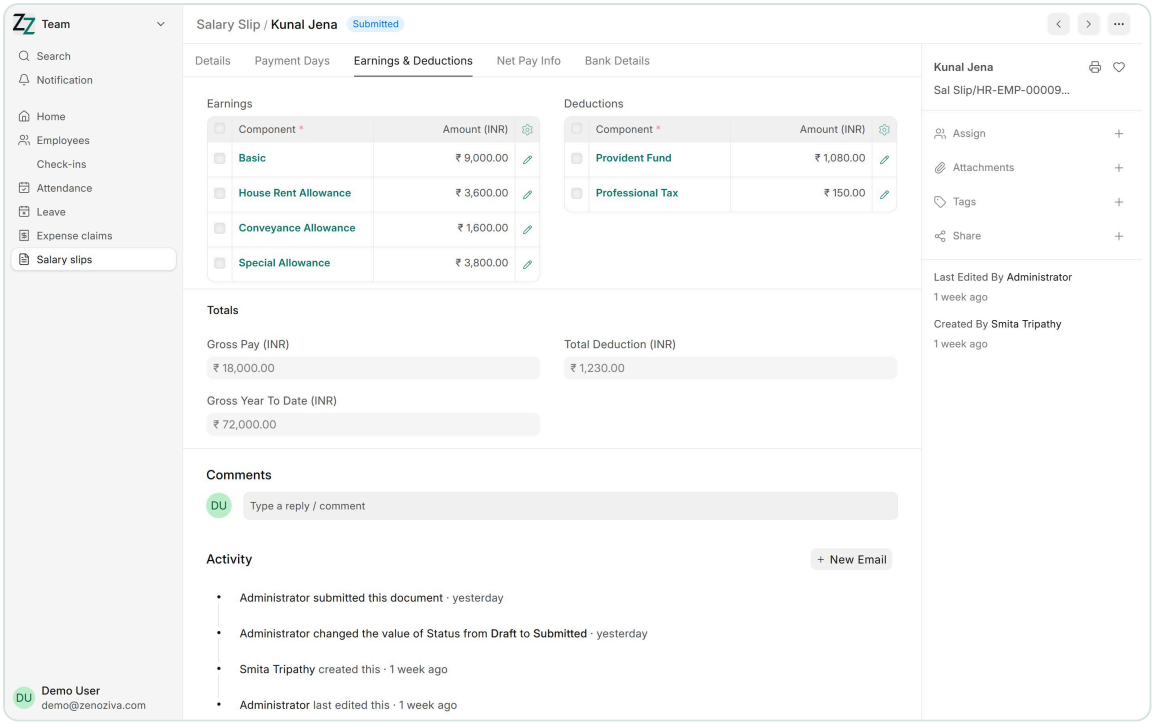
9.5 Site travel and food

Expense claims for travel and food on site, each line with a date, type and amount, approved by the employee's expense approver.



9.6 Salary slip

Each month payroll makes a salary slip for every employee from their salary structure and attendance: earnings, deductions and net pay. Staff see their own slips in the HR app.



CHAPTER 10

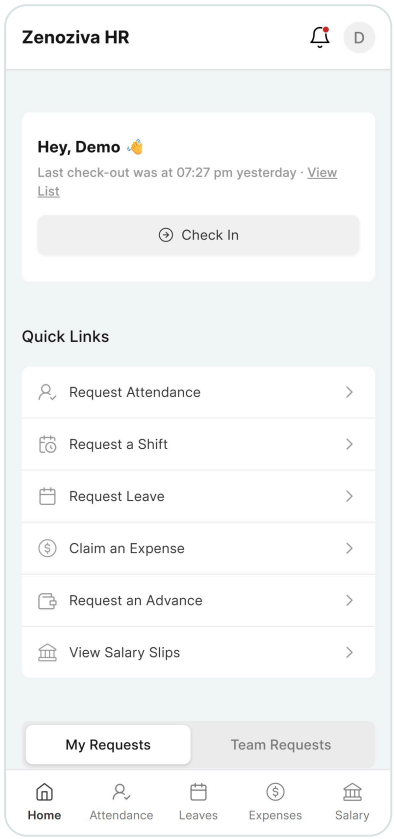
The Zenoziva HR app

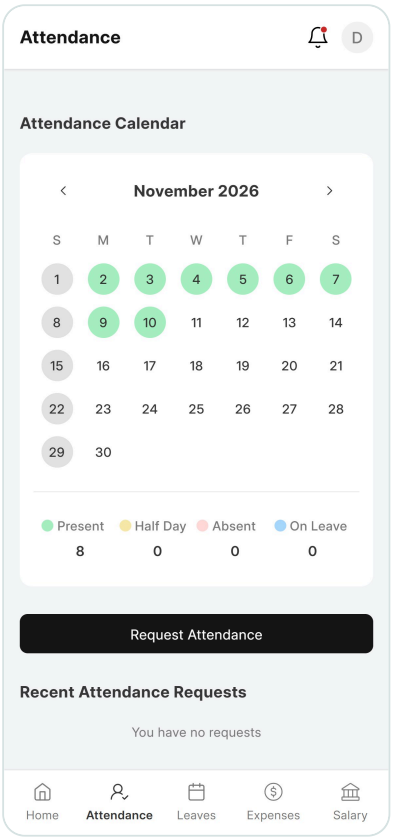
For: Every employee

On the phone, staff open Zenoziva HR: your ERP address followed by /hrms, signed in with their own login. It can be added to the phone's home screen like an app.

10.1 Check in, and see your attendance

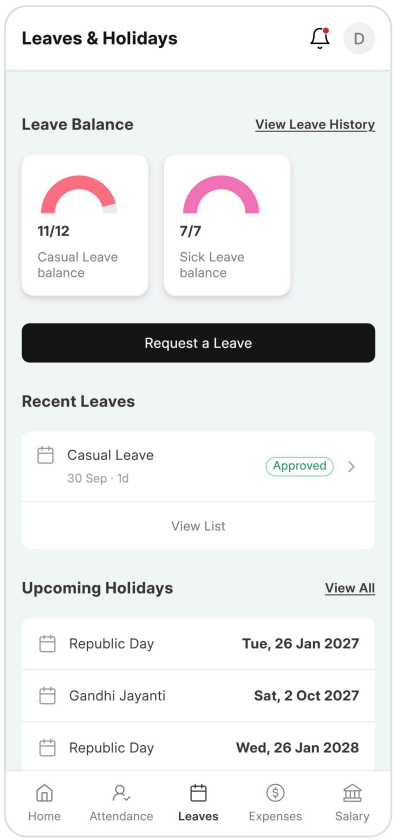
The home screen shows the last check-in and a **Check In** / **Check Out** button, with quick links for attendance, shift, leave, expense and advance requests and salary slips. **Attendance** shows the month as a calendar.

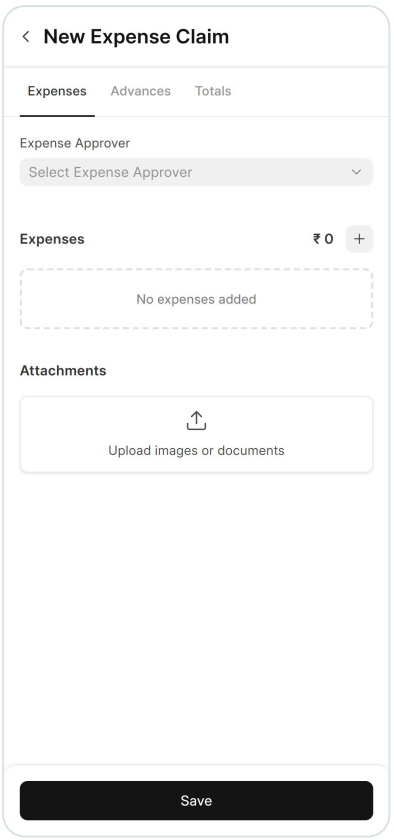




10.2 Leave and expenses

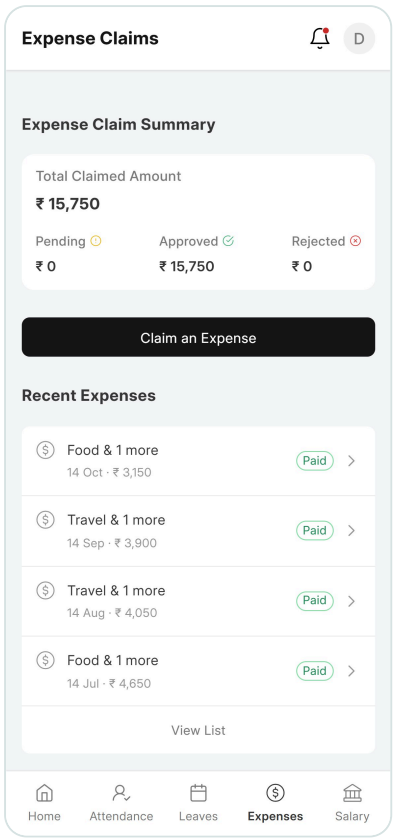
Leaves shows balances, recent leave and upcoming holidays; Request a Leave sends one for approval. Claim an Expense adds travel or food with a photo of the bill.

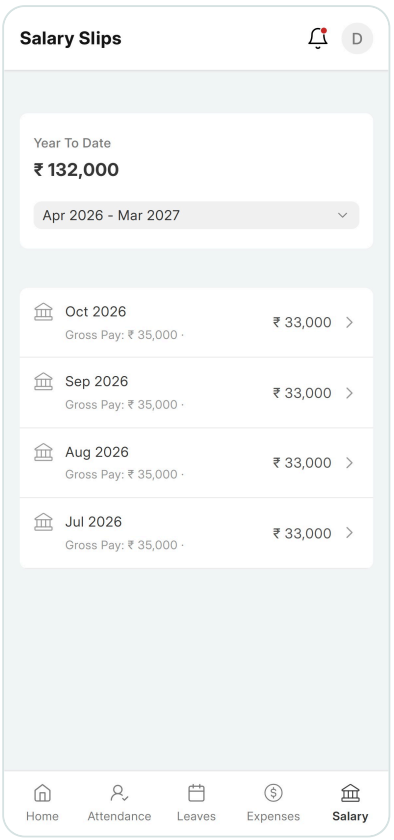




10.3 Your claims and payslips

Expenses shows what you have claimed, what is approved and what has been paid. **Salary** lists your salary slips by payroll year; open one to see earnings, deductions and net pay.





Appendix: roles and glossary

Roles and the menus they open

Role	Menus	Work
Owner, directors	Business overview (and every menu)	The whole business, margins, receivables, profit
Sales team	Sales & quotes	Leads, opportunities, quotations, orders, kits
Purchase team	Purchase	Purchase requests and orders, receipts, distributors' bills
Storekeeper	Stores & serials	Serial numbers, deliveries, stock
Project manager, engineers	Projects & installation	Projects, tasks, timesheets, handover
Service desk	Service & AMC	Tickets, warranty claims, AMC contracts and visits
Accountant	Accounts & GST	Invoices, payments, GST and TDS
HR	Team	Check-ins, attendance, leave, expenses, payroll
Every employee	Zenoziva HR app	Check-in, leave, expenses, salary slips

Glossary

Lead	A new organisation that has made an enquiry
Opportunity	What a lead or customer needs, with its stage and value
Quotation	The priced offer: a bill of quantities with GST
Kit (Product Bundle)	Several items sold as one line and delivered as their parts
Sales Order	The confirmed order; deliveries, projects and invoices are made from it
Material Request	A purchase request: what to buy, how many, by when
Purchase Order	The order to a distributor
Purchase Receipt	Goods received into the store, with serial numbers
Purchase Invoice	The distributor's bill, for payment and GST input credit
Serial No	One unit of a device: where it came from, where it is, its warranty

Delivery Note	Goods sent to the customer's site
Installation Note	The handover record: what was installed, where and when
Project Template	A standard set of tasks (survey, cabling, mounting, testing, handover)
Timesheet	Hours worked, by project and activity
Ticket (Issue)	A customer's support request
Service level agreement	Response and resolution deadlines by priority
Warranty Claim	A hardware fault on a serial number, under warranty, AMC or chargeable
AMC contract (Maintenance Schedule)	An annual maintenance contract with its scheduled visits
Service visit (Maintenance Visit)	An engineer's visit report
Sales Invoice	The tax invoice to the customer
Payment Entry	Money received or paid, matched to invoices
GSTR-1	The monthly return of outward supplies
e-way bill, e-invoice	Made from the invoice once the GST API account is connected
Employee Checkin	One punch from the biometric device or the HR app
Salary Slip	An employee's monthly pay: earnings, deductions, net pay

Need help, training for your team, or a change to your menus, prints or reports? Contact your Zenoziva team through zenoziva.com or office@zenoziva.com.