



## MIS Web Application – Features & Specifications

Version 1.1



**ProMIS** is a proprietary MIS (Management Information System) web application developed by **uncode IT Solutions** for the top management of a company to make informed decisions on their business. Typically, the CFO / CEO / MD do not have a clear idea on the exact margins their businesses make, and are in the dark about the intricate financial metrics and information that need a little expertise or accounting knowledge to extract from the backend. **ProMIS** aims to solve that problem for the top management by providing a simple, intuitive, and straightforward view to all metrics that are required to gauge the health of the business and to make the correct calls. This product was developed with help and guidance from **PPS** (Performance Products & Services), who are one of the prestigious distributors in Chennai for various business principals. This product has been tried, tested and currently in use by them.

## Salient Features

- Extraction of data at EOD from remote **Tally®** application server containing accounts
- Graphical / tabular view of financial information, such as, Sales, Gross Margin, Expenses, and Net Margin
- Segregation of data based on business (cost center in **Tally®**), product, customer, and customer branch
- View of financial information based on a selected date, week, month, quarter, or year
- Comparison of financial information on a W-on-W, M-on-M, Q-on-Q, and Y-on-Y basis
- Detailed list of vouchers outstanding / overdue after accounting for Credit Notes, Receipts and Journal entries
- View of vouchers that are part of the collection target for the selected month
- View of vouchers available as per data available in **Tally®** / imported files: Sales, Purchase, Collections (Direct receipts / Journal entries), Expense, Credit Note, and Debit Note
- Graphical view of average collection days
- Plan vs. Actuals - Set and review targets for the team on Sales / Gross Margin / Expenses / Net Margin / Avg. Collection Days
- Detailed Dashboard:

- Sales / Quantity sold / Collection Target / Collections / Outstanding / Overdues based on selected period
- Pie Chart of Sales, Cost, and Expenses leading to Gross Margin and Net Margin per business
- Top Line and Bottom Line graphs for overall period for all / selected businesses
- Overall Top Line and Bottom Line numbers for the current financial year
- Top performing businesses in the current financial year based on Top Line, Bottom Line, and Collection Days
- First-In-First-Out balancing of sold quantities against opening stock and purchased quantities to corroborate cost prices used for Gross Margin computation
- Automatic emails every morning to Admins / Editors with information present in the dashboard
- Manual file import option for Tally® XML downloaded directly from Tally®
- Manual file import option for Microsoft® Excel data downloaded from any ERP or those that are manually maintained and having any custom column format
- Display of Alerts / Events for key information / errors in Tally data
- Display of discrepancies, which include vouchers which are incongruent as per design
- Option to instantly download any table data as a Microsoft® Excel file
- Easy-to-use, and intuitive design with pleasing graphics
- License includes support for various authorization levels: Admin (Proprietor / CEO / CFO) / Editor (Business Heads / Managers) / Viewer (Team Members)
- Separate login for each user, with restrictions based on their authorization level
- Full privacy of data: A separate instance in the cloud (AWS) for each customer of **ProMIS**, for 100% data privacy

## Features in detail

### Dashboard

The Dashboard feature provides a facility to view the most important metrics for all businesses in one snapshot view.

S.No.	Business	Quantity	Sales	Outstanding	Overdue *	Collection Target	Collections	Action
1	Biz_02	7 MT, 1 Unit	8.67 Cr.	12.39 Cr.	4.82 Cr.	8.13 Cr.	6.73 Cr.	Ignore
2	Biz_03	7 KL, 2 Unit, 4 MT	1.54 Cr.	3.19 Cr.	1.19 Cr.	2.19 Cr.	1.42 Cr.	Ignore
3	Biz_05	1 MT, 1 KL, 2 Unit	20.78 L.	1.03 Cr.	65.18 L.	89.07 L.	29.24 L.	Ignore
4	Biz_06	2 NOs, 0 NO	40.23 L.	62.14 L.	8.04 L.	26.4 L.	35.21 L.	Ignore
5	Biz_08	8 NOs	3.62 L.	6.33 L.	6.2 L.	9.81 L.	3.79 L.	Ignore
6	Biz_16	4 KL, 2 MT	62.35 L.	99.35 L.	40.67 L.	1.21 Cr.	1.03 Cr.	Ignore
7	Biz_20	0	0	0	0	0	0	Ignore
8	Biz_23	0	0	0	0	0	0	Ignore
9	Biz_25	0	0	0	0	0	0	Ignore
Total			11.48 Cr.	18.29 Cr.	7.21 Cr.	12.78 Cr.	9.86 Cr.	

\* Overdues displayed above are based on current date or the last date in the selected period, whichever is earlier

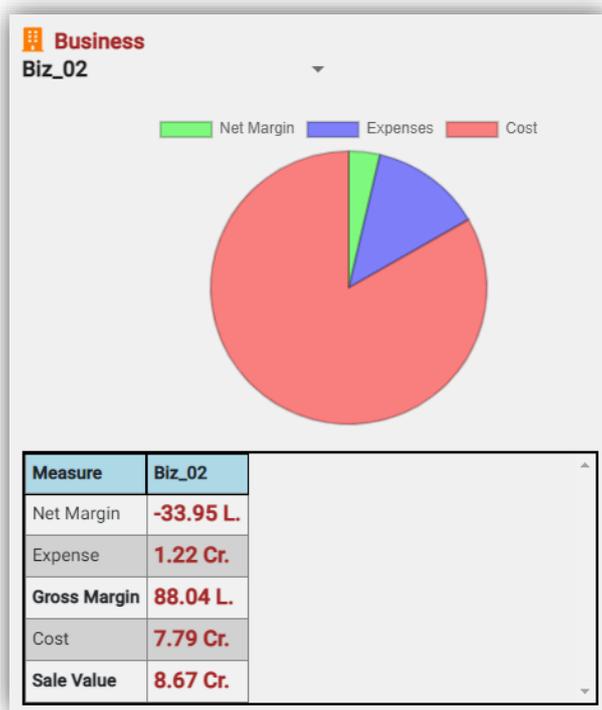
**Fig. 1:** Dashboard metrics table

Based on the selected period, the metrics are displayed / changed as illustrated in **Fig. 1** above. The metrics displayed in the table are as follows for each business in the selected period:

- Total Quantity sold
- Total Sale Value
- Total Outstanding value
- Total Overdue amount
- Collection target for the period
- Collections made

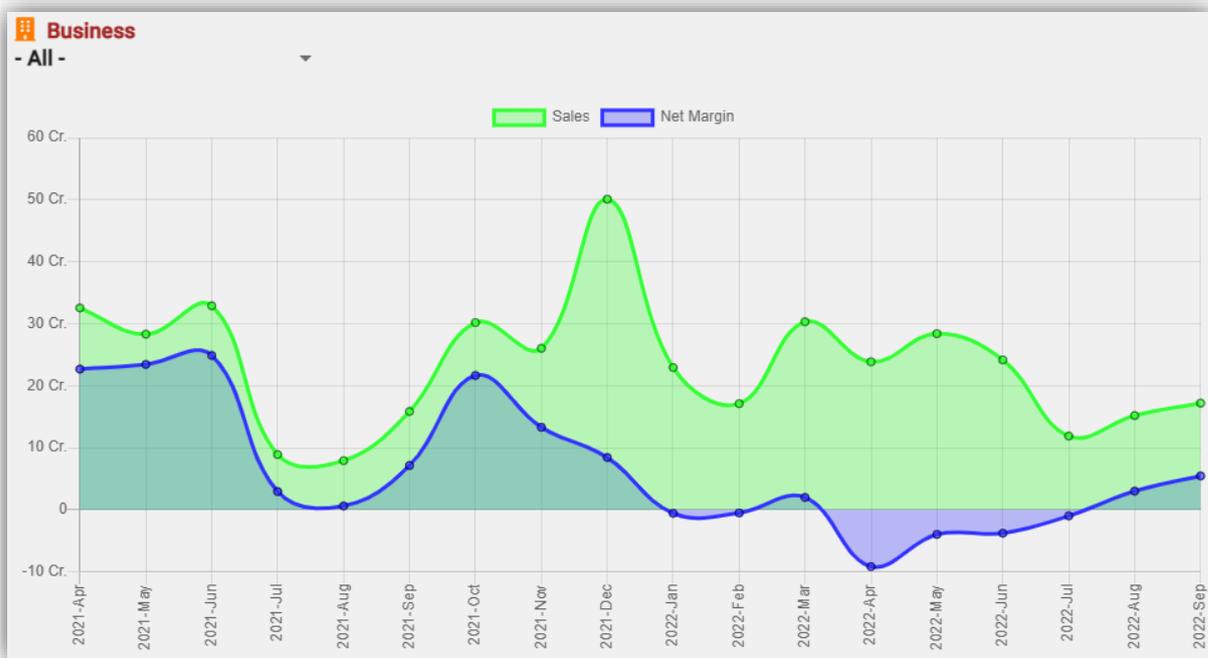
The choice of period could be one of the following:

- Date
- Week
- Month
- Quarter
- Year
- Financial Year



**Fig. 2:** Pie chart of margins

For the selected business, for the previously selected period, the margins are displayed along with the total expenses, cost of purchase, totaling the Sale Value as in **Fig. 2** above.



**Fig. 3:** Top Line and Bottom Line graphs

For the selected business, the Total Sale Value (Top Line) and the Net Margin (Bottom Line) are plotted as line graphs for the overall period from which data is available split as months, as in **Fig. 3** above.



**Fig. 4:** Business Performance in current Financial Year

The current financial year's overall performance in terms of Top Line and Bottom Line are displayed, along with the top-performing businesses in terms of Top Line, Bottom Line, and Average Collection Days are displayed as well as in **Fig. 4** above.

Business	Topline
Biz_02	25.84 Cr.
Biz_06	21.67 Cr.
Biz_20	4.36 Cr.
Biz_03	4.13 Cr.
Biz_16	3.81 Cr.
Biz_05	84.30 L.
Biz_25	47.04 L.
Biz_08	11.86 L.
Biz_23	5.57 L.

Business	Bottomline
Biz_06	3.34 Cr.
Biz_16	1.28 Cr.
Biz_20	98.84 L.
Biz_05	43.59 L.
Biz_25	24.37 L.
Biz_03	7.97 L.
Biz_08	4.18 L.
Biz_23	2.10 L.
Biz_02	-85.39 L.

Business	Coll. Days
Biz_23	0.00
Biz_20	3.43
Biz_25	6.16
Biz_05	24.80
Biz_16	26.46
Biz_02	27.52
Biz_06	32.71
Biz_08	37.16
Biz_03	41.38

**Fig. 5:** Ranking of businesses

Upon clicking the buttons (Top Line / Bottom Line / Coll. Days), the corresponding measure is used to rank businesses as in **Fig. 5** above.

For more information, visit [this page](#).

## Voucher View

Voucher View is a facility to view various voucher types, such as, Sale, Purchase, Expense, Receipt, Credit Note, Debit Note, and Journal based on business for a given time period as in **Fig. 6** below.

**Voucher View** ?

Voucher: Sale Business: Biz\_06 From: 01-07-2022 To: 31-07-2022

Voucher	Date	Business	Customer	Cust Branch	Amount
SUG/2223/0388	2022-07-01	Biz_06	Customer_0094		1,89,000.00
SUG/2223/0389	2022-07-01	Biz_06	Customer_0056		5,04,000.00
TT/2223/0188	2022-07-02	Biz_06	Customer_3374		5,843.00
TT/2223/0189	2022-07-02	Biz_06	Customer_3361		27,500.00
SUG/2223/0390	2022-07-02	Biz_06	Customer_0047		10,55,250.00
SUG/2223/0391	2022-07-04	Biz_06	Customer_0032		5,30,250.00
SUG/2223/0392	2022-07-04	Biz_06	Customer_0032		2,65,125.00
SUG/2223/0393	2022-07-04	Biz_06	Customer_4223		7,34,265.00
SUG/2223/0394	2022-07-04	Biz_06	Customer_0055		49,875.00
SUG/2223/0395	2022-07-04	Biz_06	Customer_0105		49,350.00
SUG/2223/0396	2022-07-04	Biz_06	Customer_0098		4,01,625.00
SUG/2223/0397	2022-07-05	Biz_06	Customer_0077		42,525.00
<b>Total</b>					<b>7,90,43,213.00</b>

[Download Report](#)

**Fig. 6:** Voucher View

For more information, visit [this page](#).

## Outstanding

This feature provides a facility to view the Sale vouchers that are outstanding / overdue / part of the collection target for a month. The results could be viewed across all businesses / customers, or for any selection of business / customer, and as on a given date as in **Fig. 7** below.

### Outstanding

Business  Customer

As on

Show All Outstanding

S.No.	Date	Voucher	Outstanding	Due Date	Remarks	Action
1	01-Apr-2021	<span style="background-color: #008080; color: white; padding: 2px;">BizA/2122/00001</span>	230.00	01-Apr-2021	Collection < Receivable	<span style="background-color: #800000; color: white; padding: 2px;">Suppress</span>
2	01-Apr-2021	<span style="background-color: #008080; color: white; padding: 2px;">BizA/2122/00002</span>	387.50	01-Apr-2021	Collection < Receivable	<span style="background-color: #800000; color: white; padding: 2px;">Suppress</span>
3	01-Apr-2021	<span style="background-color: #008080; color: white; padding: 2px;">BizA/2122/00003</span>	100.00	01-Apr-2021	Collection < Receivable	<span style="background-color: #800000; color: white; padding: 2px;">Suppress</span>
4	01-Apr-2021	<span style="background-color: #008080; color: white; padding: 2px;">BizA/2122/00004</span>	200.00	01-Apr-2021	Collection < Receivable	<span style="background-color: #800000; color: white; padding: 2px;">Suppress</span>
5	01-Apr-2021	<span style="background-color: #008080; color: white; padding: 2px;">BizA/2122/00005</span>	49,327.00	01-Apr-2021	Date overdue	<span style="background-color: #800000; color: white; padding: 2px;">Suppress</span>
6	01-Apr-2021	<span style="background-color: #008080; color: white; padding: 2px;">BizA/2122/00006</span>	1,030.20	01-Apr-2021	Collection < Receivable	<span style="background-color: #800000; color: white; padding: 2px;">Suppress</span>

Previous 1000 Next 1000 of 13206 items

**Net Outstanding: 1,60,81,51,905.68**

Suppress All Download Report

Note: Collection Target implicitly is for the selected month, and not the exact date.

**Fig. 7:** Outstanding / Overdues / Collection Target

For more information, visit [this page](#).

## Ageing Report

This feature provides a facility to view the ageing report for vouchers that are outstanding, with options to select the business, and the age of choice - < 30 days, 30 - 60 days, 60 - 90 days, 90 - 120 days, 120 - 180 days, 180 - 360 days, > 360 days as in **Fig. 8** below.

### Ageing Report

**Business**

- All -

**As on**

01-03-2022

**Age**

< 30 days

S.No.	Date	Voucher	Customer	Pending Amt.	Due Date	Credit Days	
				(₹)		Actual	Current
1	30-Jan-2022	BizG/2122/0003	Customer 63	11,46,600.00	01-Mar-2022	30	30
2	30-Jan-2022	BizG/2122/0001	Customer 63	11,46,600.00	01-Mar-2022	30	30
3	30-Jan-2022	BizG/2122/0002	Customer 63	11,46,600.00	01-Mar-2022	30	30
4	31-Jan-2022	BizG/2122/0004	Customer 63	9,82,800.00	02-Mar-2022	30	29
5	31-Jan-2022	BizG/2122/0005	Customer 63	11,46,600.00	02-Mar-2022	30	29
6	31-Jan-2022	BizC/2122/1839	Customer 2142	1,67,648.00	02-Mar-2022	30	29
7	31-Jan-2022	BizC/2122/1840	Customer 2402	2,24,348.00	01-Feb-2022	1	29
8	31-Jan-2022	BizC/2122/1841	Customer 2402	1,30,626.00	01-Feb-2022	1	29

← Previous 1000    **Next 1000**    of 1866 items

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**Fig. 8:** Ageing Report

For more information, visit [this page](#).

## FIFO for Gross Margin

This feature provides a facility to view the purchase quantities mapped against Sales for a given product on FIFO (First-In-First-Out) basis in order to accurately estimate the cost of purchase for each quantity sold, as in **Fig. 9** below.

### FIFO View ?

Business  
Biz\_16

Product  
Product\_0577

Apply

Purchase					Sale					Quantity		Cost	Gross Margin	Remarks	
Date	Voucher No.	Qty	Rate	Unit	Date	Voucher No.	Qty	Rate	Unit	Value	Used	Pending			
2022-05-28	EKA-RIT-10089572	420	186.14	LTRS	2022-05-26	CLB/2223/0138	420	190	LTRS	79,800.00	420	0	78,178.79	1,621.20	
2022-06-07	EKA-RIT-10090080	420	210.07	LTRS	2022-06-01	CLB/2223/0158	420	0.1	LTRS	42.00	420	0	88,229.40	-88,187.40	
2022-06-14	EKA-RIT-10090482	420	0.5	LTRS	2022-06-29	CLB/2223/0219	420	211	LTRS	88,620.00	420	0	210.00	88,410.00	
2022-07-19	EKA-RIT-10092666	630	210.07	LTRS	2022-07-15	CLB/2223/0274	420	211	LTRS	88,620.00	420	0	88,229.40	390.60	
		210									210	210	88,254.60	365.39	
2022-08-06	EKA-RIT-10093885	210	210.19	LTRS	2022-08-03	CLB/2223/0333	420	211	LTRS	88,620.00	210	0			
2022-09-09	EKA-RIT-10095678	840	210.19	LTRS	2022-08-26	CLB/2223/0407	420	260	LTRS	1,09,200.00	420	0	88,279.80	20,920.19	
		420			2022-09-03	CLB/2223/0434	210	211	LTRS	44,310.00	210	0	44,139.90	170.09	
		210			2022-09-09	CLB/2223/0453	210	211	LTRS	44,310.00	210	0	44,139.90	170.09	
<b>In stock</b>		210	210.19												

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**Fig. 9:** FIFO for Gross Margin

For more information, visit [this page](#).

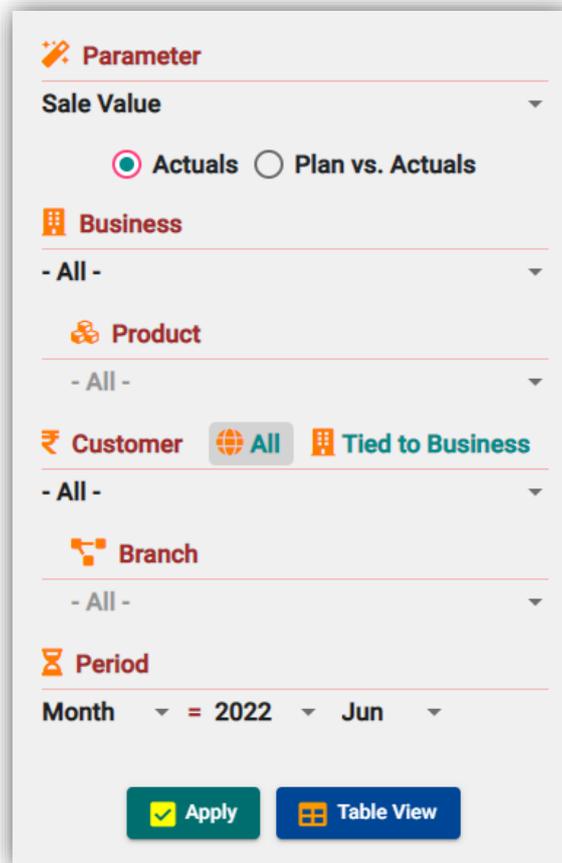


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## Input Selection Parameters

Input Selection is a facility to view the financial measures, such as, Sale Value, Gross Margin, Expense, Net Margin, and Average Collection days based on a combination of parameters, such as, the business / product, the customer / customer branch, and the period of choice, in graphical / tabular form as in **Fig. 10** below.



**Parameter**

Sale Value ▾

Actuals  Plan vs. Actuals

**Business**

- All - ▾

**Product**

- All - ▾

₹ Customer  All  Tied to Business

- All - ▾

**Branch**

- All - ▾

**Period**

Month ▾ = 2022 ▾ Jun ▾

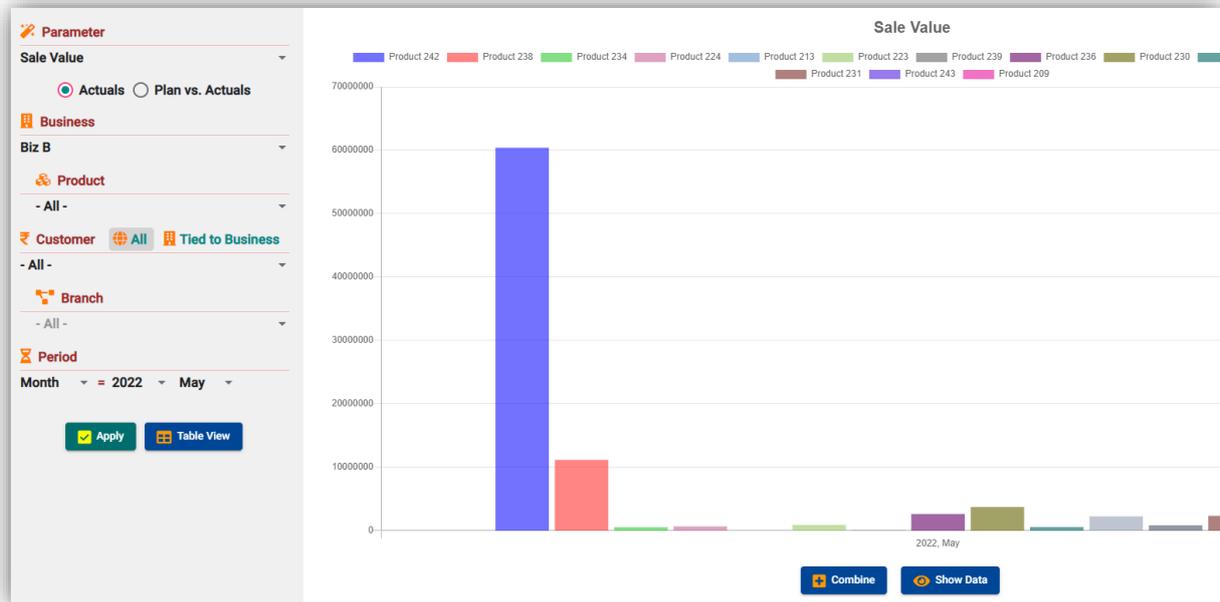
Apply  Table View

**Fig. 10:** Input Selection Parameters

For more information, visit [this page](#).

## Graph View

The graph view feature provides a graphical representation of the result based on inputs provided, after which the corresponding tabular view, or data that resulted in the graph could be viewed as in **Fig. 11** below.



**Fig. 11:** Graph View

For more information, visit [this page](#).

## Table View

The Table view feature provides a tabular display of the vouchers that were considered while computing the result displayed in the graph. Specifically, this table is constituted by sale vouchers belonging to the selected business / product / customer / customer branch / period as in **Fig. 12** below.

Time frame: 2022, Aug												
<span>Previous 1000</span> <span>Next 1000</span> <span>of 5309 records</span> <span>Download Report</span>												
S. No.	Voucher	Date	Business	Product	Description	Customer	Branch	Qty	Rate	Sale Value	Credit Note	Debit Note
1	CL/2223/0683	2022-08-01	Biz_20	Product_0527	(210 LTRS X 1 BRL)	Customer_2408		210.0 LITRE	299.0/LITRE	62,790.00	0.00	0.00
2	CL/2223/0684	2022-08-01	Biz_20	Product_0701	(195 LTRS X 1 BRL)	Customer_2140		195.0 LITRE	235.4/LITRE	45,903.00	0.00	0.00
3	CL/2223/0685	2022-08-01	Biz_20	Product_0418	(210 LTRS X 1 BRL)	Customer_2386		210.0 LITRE	174.0/LITRE	36,540.00	0.00	0.00
4	SUG/2223/0499	2022-08-01	Biz_06	Product_0743		Customer_0022		25000.0 KG	35.75/KG	8,93,750.00	0.00	0.00
5	SUG/2223/0500	2022-08-02	Biz_06	Product_0743		Customer_0022		30000.0 KG	35.75/KG	10,72,500.00	0.00	0.00
6	CL/2223/0686	2022-08-01	Biz_20	Product_0542	(210 LTRS X 1 BRL)	Customer_2900		210.0 LITRE	180.0/LITRE	37,800.00	0.00	0.00
7	PL/2223/0117	2022-08-01	Biz_25	Product_1066	(18 KGS X 1 PAIL)	Customer_4175		18.0 KG	1350.0/KG	24,300.00	0.00	0.00
8	CL/2223/0687	2022-08-01	Biz_20	Product_1153	(20 LTRS X 2 PAILS)	Customer_2164		40.0 LITRE	210.0/LITRE	8,400.00	0.00	0.00
9	CL/2223/0688	2022-08-01	Biz_20	Product_0669	(180 KGS X 1 BRL)	Customer_2396		180.0 KG	285.0/KG	51,300.00	0.00	0.00
10	CL/2223/0689	2022-08-02	Biz_20	Product_0686	(20 LTRS X 1 PAIL)	Customer_2195		20.0 LITRE	310.0/LITRE	6,200.00	0.00	0.00
11	CL/2223/0690	2022-08-02	Biz_20	Product_0668	(20 KGS X 5 PAILS)	Customer_2196		100.0 KG	281.0/KG	28,100.00	0.00	0.00
Grand total		2022-						1,36,235.67 LITRE, 25,08,513.00 KG, 5,469.00 NOs, 25,101.00 LTRS, 11,082.00 KGS, 160.00 NQ, 7.00 Unit		15,18,72,142.52	0.00	0.00

**Fig. 12:** Table View

For more information, visit [this page](#).

## Multi-period Support

In addition to Date, Week, Month, Quarter, Year, and Financial Year, additional multi-periods, such as, Week-on-Week, Month-on-Month, Quarter-on-Quarter, and Year-on-Year are supported for comparison of metrics, as in **Fig. 13** below.



**Fig. 13:** Multi-period Support

For more information, visit [this page](#).

## Business Grouping

This feature provides a facility to logically group businesses so that the financial metrics / parameters could be viewed as an aggregate value. Note that grouping businesses does not remove the possibility of viewing the businesses individually, as in **Fig. 14** below, and the businesses after being grouped, appear in all business selection lists, as in **Fig. 15** below.

### Group Businesses

Group		Businesses		Action
Name	Modify	List	Modify	
Exports	Edit	<span>Biz F</span> <span>Biz D</span>		Delete
Local	Edit	<span>Biz E</span> <span>Biz A</span> <span>Biz C</span> <span>Biz H</span>		Delete
Add New				

Save

**Fig. 14:** Business Grouping

Biz H

Biz I

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Exports

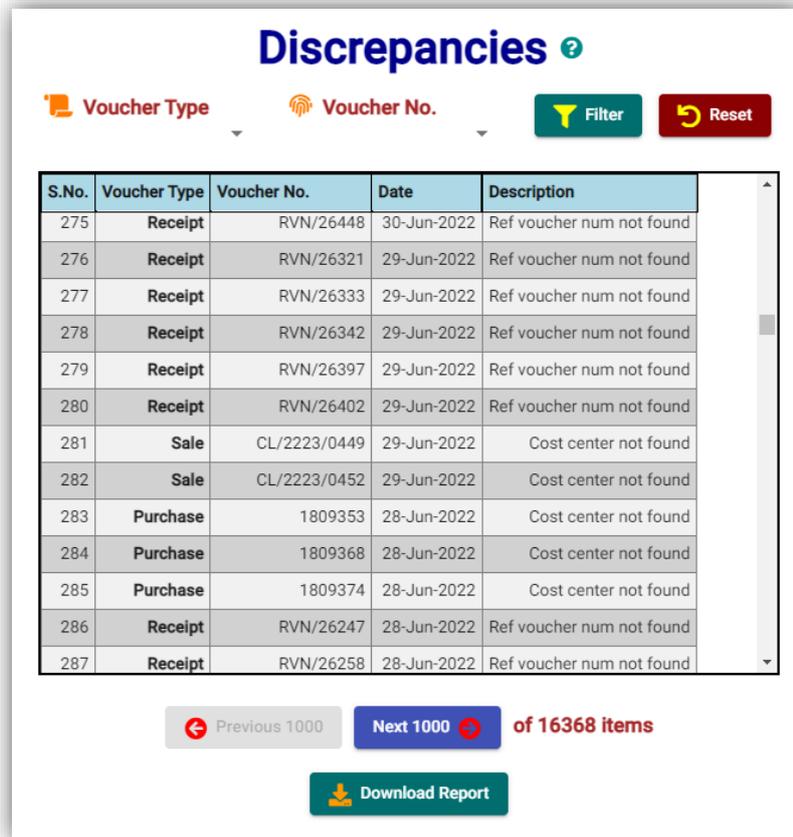
Local

**Fig. 15:** Grouped Businesses

For more information, visit [this page](#).

## Discrepancies

This feature provides a facility to view discrepancies observed in the data imported from the backend. These are typically issues found in the vouchers that prevent any / all information available in the vouchers to be read fully from the Tally® server. These issues must be viewed and appropriate remedial action taken from time to time so that the backend data is sanitized, as in **Fig. 16** below.



The screenshot shows a web interface titled "Discrepancies" with a search bar for "Voucher Type" and "Voucher No.", and buttons for "Filter" and "Reset". Below the search bar is a table with the following data:

S.No.	Voucher Type	Voucher No.	Date	Description
275	Receipt	RVN/26448	30-Jun-2022	Ref voucher num not found
276	Receipt	RVN/26321	29-Jun-2022	Ref voucher num not found
277	Receipt	RVN/26333	29-Jun-2022	Ref voucher num not found
278	Receipt	RVN/26342	29-Jun-2022	Ref voucher num not found
279	Receipt	RVN/26397	29-Jun-2022	Ref voucher num not found
280	Receipt	RVN/26402	29-Jun-2022	Ref voucher num not found
281	Sale	CL/2223/0449	29-Jun-2022	Cost center not found
282	Sale	CL/2223/0452	29-Jun-2022	Cost center not found
283	Purchase	1809353	28-Jun-2022	Cost center not found
284	Purchase	1809368	28-Jun-2022	Cost center not found
285	Purchase	1809374	28-Jun-2022	Cost center not found
286	Receipt	RVN/26247	28-Jun-2022	Ref voucher num not found
287	Receipt	RVN/26258	28-Jun-2022	Ref voucher num not found

Below the table, there are navigation buttons: "Previous 1000", "Next 1000", and "of 16368 items". A "Download Report" button is also present.

**Fig. 16:** Discrepancies

For more information, visit [this page](#).

## Plan vs. Actuals

The Plan feature is to allow providing a target value for financial metrics so that they could be compared against their Actual values. The idea is to provide values for periods in the future. The supported metrics are: Sale Value, Gross Margin, Expense, Net Margin, and Average Collection Days, as in **Fig. 17** below, and the corresponding graph after the fact, as in **Fig. 18** below.

**Plan**

Parameter: Sale Value | Business: Biz I | Year: 2021

Month	Target	Action
January	2,30,000.00	Edit
February	2,35,000.00	Edit
March	2,40,000.00	Edit
April	2,50,000.00	Edit
May	0.00	Edit
June	0.00	Edit
July	0.00	Edit
August	0.00	Edit
September	0.00	Edit
October	0.00	Edit

[Save](#)

**Fig. 17:** Plan (Target) for Metrics



**Fig. 18:** Plan vs. Actuals feature showing Plan (in blue) and Actuals (in green) on a M-on-M basis

For more information, visit [this page](#).

## Primary Costs for Gross Margin

This feature provides a facility to input values for primary costs (to be adjusted in Gross Margin) incurred on account of sales carried out in a certain month. These costs are not expenses to be adjusted against the Net Margin, but if there are payouts from the business that have to be deducted directly from the Gross Margin, then this is the place to provide those values against each Sale voucher, as in **Fig. 19** below.

### Primary Costs

**Business**  
Biz I

**Month**  
2021 Dec

**Cost Per**  
Total Value

**Import from Excel**

S.No.	Date	Voucher No.	Customer	Product	Sale Value	Qty	Primary Cost	Action
1	2021-12-03	Bizl/2122/0677	Customer 3375	Product 1175	29,400.00	60 NOs	1,026.35	Edit
2	2021-12-04	Bizl/2122/0678	Customer 3470	Product 1009	1,04,280.00	200 NOs	15,263.20	Edit
3	2021-12-04	Bizl/2122/0678	Customer 3470	Product 1112	18,706.00	100 NOs	956.60	Edit
4	2021-12-04	Bizl/2122/0678	Customer 3470	Product 1095	2,352.90	10 NOs	532.00	Edit
5	2021-12-04	Bizl/2122/0678	Customer 3470	Product 1329	9,717.60	40 NOs	896.25	Edit
6	2021-12-04	Bizl/2122/0678	Customer 3470	Product 1096	11,858.80	40 NOs	1,002.35	Edit
7	2021-12-04	Bizl/2122/0678	Customer 3470	Product 1098	12,100.00	20 NOs	698.00	Edit
8	2021-12-04	Bizl/2122/0678	Customer 3470	Product 1333	8,722.50	30 NOs	250.00	Edit

**Save**

Note: In Cost Per: Unit Qty mode, the value supplied would be automatically multiplied by the quantity to arrive at total value.

**Fig. 19:** Primary Costs input

For more information, visit [this page](#).

## Import from Excel

This feature provides a facility to import data manually into ProMIS From Microsoft® Excel files, so that ProMIS could be used with any backend ERP that contains data apart from Tally®, as in **Fig. 20** below.



**Import from Excel** ?

From 01-09-2022 To 30-09-2022

Input Info	Status	Filename	Actions
Customers	Columns matched	Cx.xlsx	📄 = ↻
Stocks	Columns matched	StockInfo.xlsx	📄 = ↻
Sales	Columns matched	Sale.xlsx	📄 = ↻
Purchase	Columns matched	Purchase.xlsx	📄 = ↻
Expense	Columns matched	Expense.xlsx	📄 = ↻
Receipt	Columns matched	Receipt.xlsx	📄 = ↻
Credit Note	Columns matched	CreditNote.xlsx	📄 = ↻
Debit Note	Columns matched	DebitNote.xlsx	📄 = ↻

[Schedule Import](#)

**Fig. 20:** Import from Excel

For more information, visit [this page](#).

## Import from Tally XML

This feature provides a facility to import data manually into ProMIS based on XML files downloaded from Tally®, as in **Fig. 21** below.

The screenshot shows a web interface titled "Import from Tally XML" with a help icon. It contains the following sections:

- Firm Name:** A text input field containing "XYZ CHN".
- Masters file:** A "Select" button followed by the text "Sam1.xml".
- Stock Summary file:** A "Select" button followed by the text "Sam2.xml".
- Transaction files:** A table with two rows:
  - Row 1: "From" date "01-08-2022" (with a calendar icon), "to" date "31-08-2022" (with a calendar icon), a "Select" button, and the text "Sample1.xml".
  - Row 2: "From" date "01-09-2022" (with a calendar icon), "to" date "30-09-2022" (with a calendar icon), a "Select" button, the text "Sample2.xml", and two small circular buttons: a green one with a "+" sign and a red one with a "-" sign.

At the bottom center, there is a blue button labeled "Schedule Import".

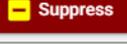
**Fig. 21:** Import from Tally XML

For more information, visit [this page](#).

## Alerts

This feature provides a facility to view alerts generated from the application with respect to the data in the backend so appropriate action could be taken, as in **Fig. 22** below.

Alerts

S.No.	Date	Type	Remarks	Action
1	21-Jul-2022	Credit Days Change	Credit days change: Bangalore Industrial Oils - from 0 to 5	 Suppress
2	21-Jul-2022	Credit Days Change	Credit days change: CHANDRA LUBRICARE - from 0 to 30	 Suppress
3	21-Jul-2022	Credit Days Change	Credit days change: Quintant Engineering & Services, - from 0 to 1	 Suppress
4	21-Jul-2022	Credit Days Change	Credit days change: RANE ENGINE VALVE LIMITED - from 0 to 15	 Suppress
5	21-Jul-2022	Credit Days Change	Credit days change: SRI SAI BABA ENTERPRISES - from 1 to 15	 Suppress
6	21-Jul-2022	Credit Days Change	Credit days change: TRIVENI ENGINEERING INDUSTRIES LTD - from 0 to 45	 Suppress
7	21-Jul-2022	Credit Days Change	Credit days change: ZEN ENGINEERS - from 60 to 1	 Suppress
8	21-Jul-2022	Credit Days Change	Credit days change: LUBRI TRADE - from 0 to 1	 Suppress
9	21-Jul-2022	Credit Days Change	Credit days change: M.K.ENTERPRISES - from 0 to 30	 Suppress

 Suppress All
 Save

**Fig. 22:** Alerts

For more information, visit [this page](#).

## User Management

This feature provides a facility to add / modify / remove users from the application. Users must be created using this feature in order for them to have a separate login, and roles (Admin / Editor / Viewer) and permissions attached to them based on their role / responsibility in the business, as in **Fig. 23** below.

### Manage Users

S.No.	Email ID	Status	Authorization	Businesses	Manage	Reminder	Action
1	ashwin@uncodeit.co	Signed up	Admin 				 Delete
2	ashwink911@gmail.com	Signed up	Editor 	SUGAR Castrol - CL			 Delete
3	user@company.com	New User	Viewer 			 Send Mail	 Delete

 Add New
 Save

**Fig. 23:** User Management

For more information, visit [this page](#).

## Automatic Daily Snapshot Email

This feature is provided as a standard option to send the dashboard table as part of an email triggered every morning with information as of the Close of Business the previous day, as in **Fig. 24** below.

ProMIS - Business Summary: 23-Sep-2022 Inbox x → ✕

 **ProMIS Admin** <promis@uncodeit.co> Fri, Sep 23, 8:45 AM ☆  
to me ▾

Hi Ashwin,

Please find the business summary for the month of Sep-2022 as below:

S.No.	Business	Quantity	Sales	Outstanding	Overdue *	Collection Target	Collections
1	Biz_02	0	0	42.47 L.	42.47 L.	91.85 L.	49.38 L.
2	Biz_03	0	0	76.63 L.	70.88 L.	1.14 Cr.	33.23 L.
3	Biz_05	0	0	56.08 L.	56.08 L.	57.81 L.	1.74 L.
4	Biz_06	1458 MT, 3257 NOs, 70 NO	5.75 Cr.	6.91 Cr.	2.15 Cr.	4.68 Cr.	4.55 Cr.
5	Biz_08	0	0	7.16 L.	7.16 L.	7.23 L.	6961
6	Biz_16	17 KL, 398 KGS	41.99 L.	1.38 Cr.	66.08 L.	98.27 L.	33.87 L.
7	Biz_20	37 KL, 1 MT	87.07 L.	3.6 Cr.	86.49 L.	1.81 Cr.	60.25 L.
8	Biz_23	6 MT	2.82 L.	4.4 L.	0	1.84 L.	1.45 L.
9	Biz_25	300 KG, 481 LITRE	8.35 L.	40.04 L.	14.37 L.	24.69 L.	7.01 L.

\* Overdues displayed above are based on current date or the last date in the selected period, whichever is earlier

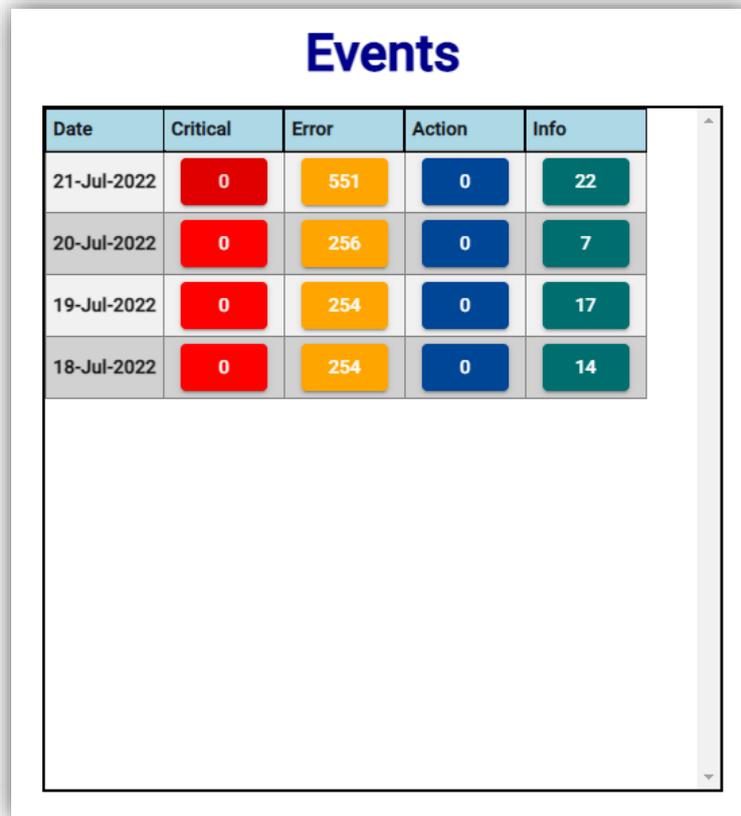
Regards,  
ProMIS Admin.

 **ProMIS**

**Fig. 24:** Daily Snapshot Email

## Application Events

This feature provides a facility to view the events that were generated through the running of the application. The events are broadly classified as Critical, Error, Action, and Info. There's also a provision to drill down the events and view them in detail, as in **Fig. 25** below.



Date	Critical	Error	Action	Info
21-Jul-2022	0	551	0	22
20-Jul-2022	0	256	0	7
19-Jul-2022	0	254	0	17
18-Jul-2022	0	254	0	14

**Fig. 25:** Events

For more information, visit [this page](#).

## Application Settings

This feature provides a facility to view / alter the settings of the application, as in **Fig. 26** below.

**Settings** ?

Background Tally Importer:  Importer process is in scheduled state

Tally Importer scheduled time: 22 : 09

Parameter Recalculation:

Import Progress: 100%

Log Level: Debug

Businesses View:

Primary Costs:

Auto-delete events older than: 4 days

Tally URL:

IDs to receive daily updates:   ashwin@uncodeit.co

**Fig. 26:** Settings

For more information, visit [this page](#).

For Pricing, visit [this page](#).

Contact us for a live demo.



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