



**TECHHIND**

SOFTWARE TAILORED YOUR WORKFLOW

PLATFORM HANDBOOK

# Solar CRM, built for **every** stage of the business.

A complete walkthrough of TechHind Solar CRM — from the first marketing lead to installed, paid, and serviced projects — for EPC companies, distributors, and integrators.

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### HOW TO USE THIS HANDBOOK

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START HERE

# What TechHind Solar CRM is, and how to read this handbook.

The next three chapters cover the platform's value proposition, its full capability map, and how to find your way around on day one.

From Chapter 4 onward, each module is covered in its own dedicated section with live screenshots.

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CHAPTER 01

**Executive Overview**

CHAPTER 02

**Platform Capabilities**

CHAPTER 03

**Getting Started**

## What Is TechHind Solar CRM?

TechHind Solar CRM is a complete Solar Management System for EPC companies, distributors, and integrators. It manages the full business journey — from marketing lead to installed project, payment collection, and after-sales service — in one platform.

**8**

Business areas covered, pre-sales to service

**1**

Single platform — no spreadsheet hand-offs

**100%**

Role-based — every team sees only what it needs

## Who Is It For?

STAKEHOLDER	WHAT THEY GAIN
Sales & marketing	Lead pipeline, inquiries, quotations, conversion tracking
Operations	Order execution, fabrication, installation, delivery
Warehouse	Purchase orders, stock, serial tracking, dispatch
Finance	Collections, outstanding tracking, B2B invoicing
Service teams	Tickets, warranty, spare parts
Management	Dashboards, KPIs, approvals, reports

## Platform at a Glance

- ✓ **Pre-Sales** — Marketing leads, Meta campaigns, inquiries, site visits, quotations
- ✓ **Sales** — Orders from quotation to confirmation, amendments, payments
- ✓ **Execution** — Fabrication, installation approval, delivery challans
- ✓ **Supply chain** — Suppliers, purchase orders, stock, serialized inventory
- ✓ **B2B** — Dealer quotes, orders, shipments, invoices
- ✓ **Commission** — Partner incentives with approval and payout
- ✓ **Service** — Tickets, warranty claims, service billing
- ✓ **Administration** — Users, roles, company profile, reference data

## Key Differentiators

### 01 Complete lifecycle in one system

No gaps between sales, operations, and finance.

### 02 Built for solar

Project schemes, DISCOM, subsidy docs, panel/inverter serial tracking, installation sign-off.

### 03 Role-based access

Each team sees what they need; management controls permissions.

### 04 Professional documents

Quotation PDFs, order documents, invoices, warranty cards.

### DEMO ENVIRONMENT

Screenshots in this handbook are captured from the live demo at [demo.techhind.in](https://demo.techhind.in) — every screen shown is the actual product, not a mockup.

# One Platform for Your Entire Solar Business

TechHind Solar CRM brings sales, project execution, inventory, finance, and after-sales service into a single workspace. Your teams work from one system — with menus and data tailored to each role.

## What the Platform Delivers

### End-to-end project lifecycle

Track every residential and commercial project from first lead through installation, subsidy documentation, payments, and warranty service — without switching between spreadsheets and disconnected tools.

### Role-based workspaces

Each user sees only the modules they need. Sales teams manage pipelines and quotations; warehouse staff handle stock and dispatch; finance tracks collections; managers review dashboards and approvals.

### Professional customer documents

Generate branded quotation PDFs, order documents, delivery challans, B2B invoices, payment receipts, and warranty cards — ready to share with customers and partners.

### Digital lead capture

Connect Meta (Facebook/Instagram) Lead Ads so campaign leads flow directly into your sales pipeline with source tracking and assignment.

### Real-time visibility

Dashboards, pipeline boards, and KPI strips give management an up-to-date picture of sales, execution backlog, outstanding payments, and service workload.

### Control and accountability

Approval workflows for quotations, installations, payments, and commissions. Full audit history for payments and uploaded documents.

## Who Benefits

TEAM	KEY CAPABILITIES
Sales & marketing	Leads, inquiries, quotations, follow-ups
Operations	Orders, fabrication, installation, delivery
Warehouse	Stock, purchase orders, challans, serial tracking
Finance	Payments, outstanding, B2B invoicing, commission
Service	Tickets, warranty claims, material requests
Management	Dashboards, reports, approvals

#### INTEGRATED BY DESIGN

Sales, execution, inventory, B2B trading, commission, and service modules share the same customer and order data — so information entered once is available everywhere it is needed.

# Logging In & Finding Your Way

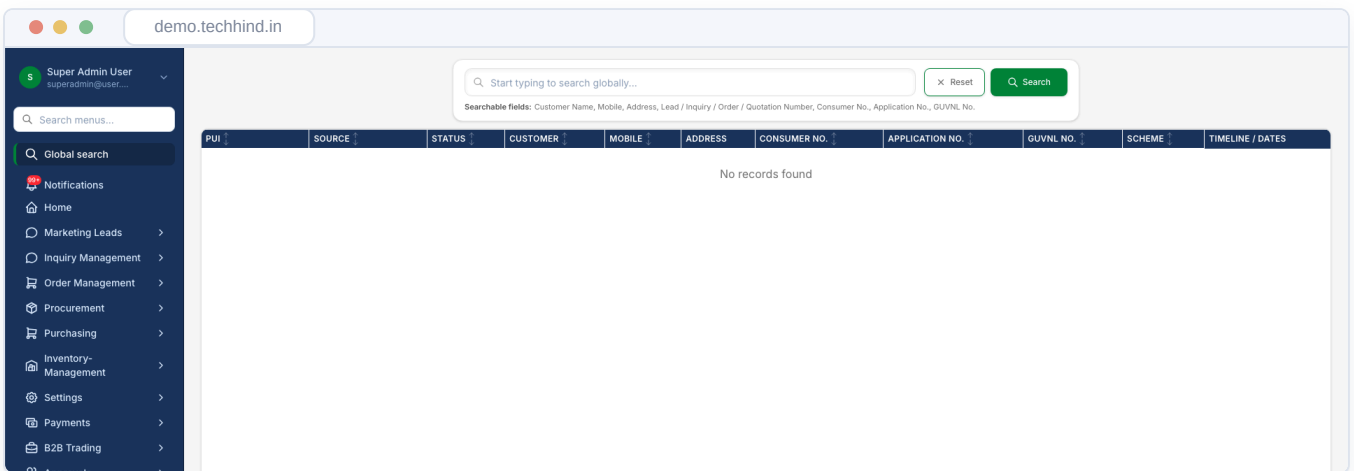
Open your organization URL and sign in with your email and password. From there, everything you need is one search or one click away.

## Navigation

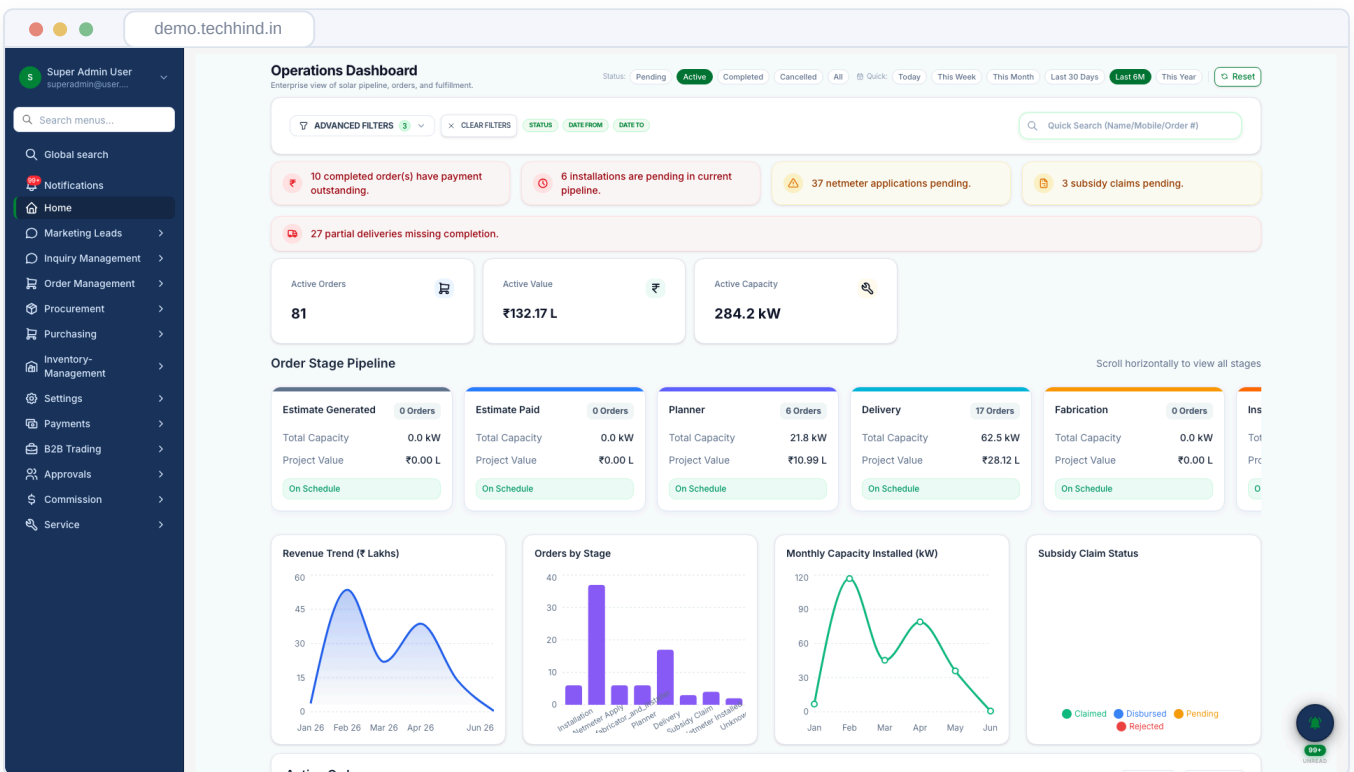
The **sidebar** shows modules assigned to your role. Use **menu search** to find any screen quickly. The **notification bell** shows alerts; **global search** finds records across modules.

## Typical First Steps

ROLE	START WITH
Sales	Marketing Leads → Inquiry → Quotation
Operations	Confirm Orders → Fabrication & Installation
Warehouse	Stocks → Purchase Orders
Finance	Payment Outstanding → Reports
Admin	Company Profile → Users & Roles



Sign in, then use global search to find any record by name, mobile, order, or application number.



Your landing page — KPIs, sales pipeline, and recent orders at a glance.

# Dashboard & Analytics

A real-time view of business performance — pipeline health, order activity, and key metrics — without running separate reports.

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PRIMARY USERS

**Management, Sales Managers,  
Operations**

COVERS

**KPI cards, pipeline board, order  
activity, trends**

## Your Business, at a Glance

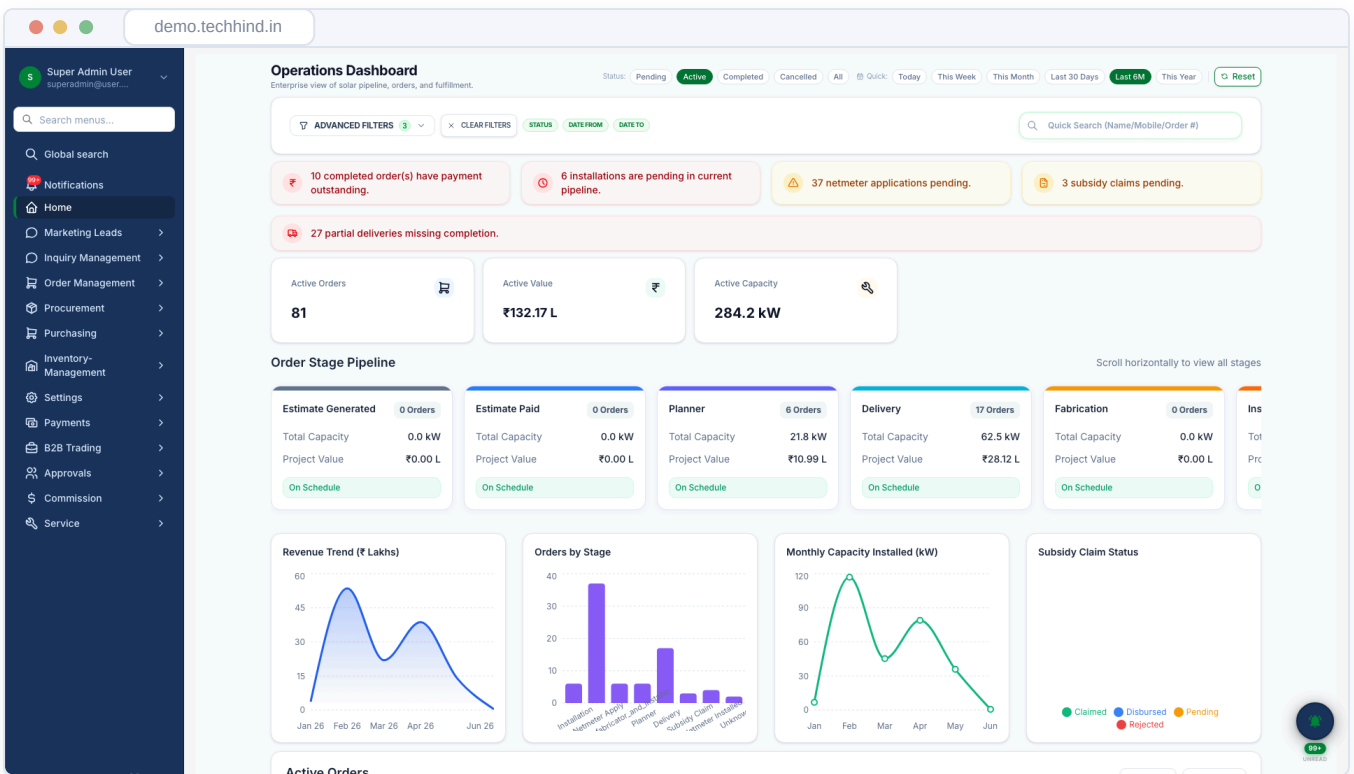
The home dashboard gives leadership and sales managers a real-time view of business performance — pipeline health, order activity, and key metrics — without running separate reports.

### What You Can Do

- View KPI summary cards for sales and operations
- Monitor the sales pipeline board by stage
- Review recent orders and their status
- Analyze trends over selectable time periods

### Who Uses It

ROLE	USE
Management	Daily business review
Sales managers	Team pipeline and conversion
Operations	Order backlog visibility



Executive dashboard with KPIs, pipeline, and order activity.

**WHY IT MATTERS**

One screen replaces the morning round of status calls — management sees pipeline health, payment exposure, and installation backlog the moment they log in.

# Marketing Leads & Meta Integration

Capture and qualify digital marketing leads before they enter the formal sales pipeline. Meta Lead Ads integration brings Facebook and Instagram campaign leads directly into the system.

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PRIMARY USERS

Marketing, Sales Executives

COVERS

Kanban pipeline, lead detail, Meta sync, bulk import

# From Ad Click to Qualified Lead

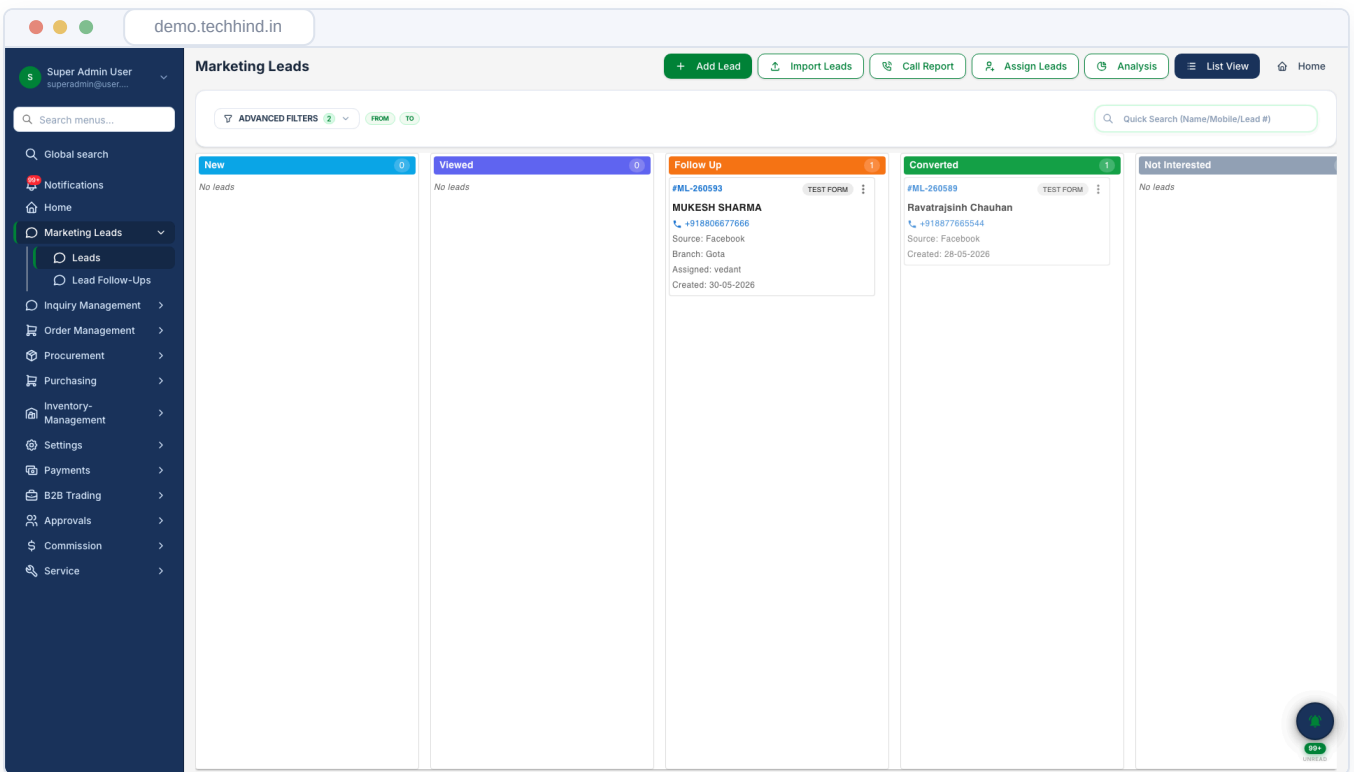
Capture and qualify digital marketing leads before they enter the formal sales pipeline. Meta Lead Ads integration brings Facebook and Instagram campaign leads directly into the system.

## What You Can Do

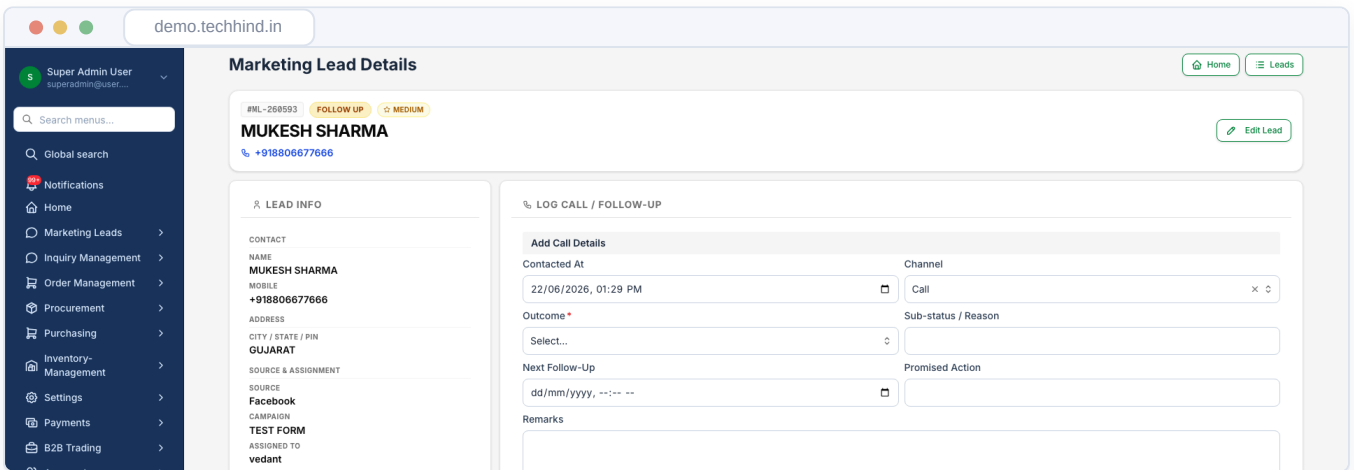
- Manage leads on a visual kanban pipeline
- View lead detail with call history and campaign source
- Assign leads to sales executives
- Import leads in bulk from spreadsheets
- Connect Meta Lead Ads for automatic lead sync

## How It Works

- 1 Lead arrives from Meta, upload, or manual entry
- 2 Team qualifies and records follow-up calls
- 3 Qualified lead converts to an Inquiry



Visual pipeline for marketing leads by stage.



Lead detail with contact info, source, and follow-up history.

# Inquiry Management

Track sales opportunities from first contact through site assessment and qualification — the foundation of your solar sales pipeline.

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PRIMARY USERS

**Sales Executives, Site Surveyors**

COVERS

**Kanban board, inquiry form, follow-ups, site visits**

# The Foundation of Your Sales Pipeline

Track sales opportunities from first contact through site assessment and qualification — the foundation of your solar sales pipeline.

## What You Can Do

- Manage inquiries on a kanban board by stage
- Create inquiries with customer, capacity, location, and DISCOM details
- Open inquiry detail view with follow-ups, site visits, documents, and quotations
- Schedule follow-up calls and site visits
- Convert qualified inquiries to quotations

## How It Works

- 1 Create inquiry or convert from marketing lead
- 2 Record follow-ups and site visit data
- 3 Attach supporting documents
- 4 Generate quotation when customer is ready

The dashboard displays a pipeline of inquiries categorized into five stages:

- New:** 0.00 KW (2)
  - #260686 Facebook (0.00 KW) - <test lead: dummy data for FULL\_NAME> - Inquired by: Super Admin User - Date of Inquiry: 2026-06-17 - Assigned On: 2026-06-17
  - #2605156 Facebook (0.00 KW) - <test lead: dummy data for PHONE> - Inquired by: Admin User - Date of Inquiry: 2026-05-20 - Assigned On: 2026-05-20
- Connected:** 3.00 KW (1)
  - #2605215 Direct (3.00 KW) - BHGBCVHVB - Inquired by: vedant (+919883838376) - Date of Inquiry: 2026-05-30 - Assigned On: 2026-05-30 - Next Reminder: 2026-05-30
- Site Visit Done:** 0.00 KW (0)
- Quotation:** 15.69 KW (10)
  - #TH0004 (3.66 KW) - Ravatrajsinh Chauhan - Inquired by: Super Admin User (+918153084212) - Date of Inquiry: 2026-06-18 - Assigned On: 2026-06-18
  - #TH0003 (3.66 KW) - Ravatrajsinh Chauhan - Inquired by: Super Admin User (+919998888887) - Date of Inquiry: 2026-06-15 - Assigned On: 2026-06-15
  - #260658 Facebook (0.00 KW) - ravat - Inquired by: vedant (+919876546975) - Date of Inquiry: 2026-06-06 - Assigned On: 2026-06-06
  - #TH0000 Direct (3.00 KW) - Nncbtfb - Inquired by: vedant (+918855665566) - Date of Inquiry: 2026-06-05 - Assigned On: 2026-06-05 - Next Reminder: 2026-06-05
- Under Discussion:** 30.76 KW
  - #2604168 (3.66 KW) - Ravatrajsinh - Inquired by: Super Admin User (+919238475610) - Date of Inquiry: 2026-04-17 - Assigned On: 2026-04-17
  - #2602166 (11.00 KW) - Ravatrajsinh Chauhan - Inquired by: Ravatrajsinh (+918153084730) - Date of Inquiry: 2026-02-18 - Assigned On: 2026-02-18 - Next Reminder: 2026-02-18
  - #260213 (3.66 KW) - Tech Hind - Inquired by: Ravatrajsinh (+918153083730) - Date of Inquiry: 2026-02-09 - Assigned On: 2026-02-09
  - #260157 (3.00 KW) - tvttvtv - Inquired by: Super Admin User (8200371191) - Date of Inquiry: 2026-01-18 - Assigned On: 2026-01-18 - Next Reminder: 2026-01-18

Stage-based inquiry pipeline.

The 'Add New Inquiry' form includes the following sections:

- Inquiry Details:** Inquiry Status, Date of Inquiry, Inquired By, Handled By, Project Scheme, Domain, Customer Details (Name, Mobile Number, Email ID, Phone No, State, District, Address), Other Details (Remarks, Next Reminder Date, Reference Photo), Estimated Cost, and Payment Type.
- Customer Information:** Customer Name, Email ID, Phone No, State, City, Landmark / Area, District.
- Project Information:** Project Name, Order Type, Company Name, Pin Code, Taluka.

New inquiry capture form with customer and project fields.

The 'Inquiry Details' hub provides a comprehensive view of a specific inquiry, including:

- Header:** Inquiry Status, Assigned On, Last Call On, Last Site Visit On, Last Question On.
- Navigation:** Follow-ups, Site Visits, Previous Questions, Documents.
- Content:** Inquiry Details, Customer Information, Project Information, Company/Project, Contacted On, Project Name, Project Address, Project No., Assigned By, Inquired By, Handled By, Customer Name, Remarks, Next Reminder Date.
- Footer:** Showing 1 to 6 of 6 items, Page 1 of 1, Next, Previous.

Inquiry hub with tabs for follow-ups, site visits, and documents.

# Quotations

Create formal commercial proposals from qualified inquiries — with pricing, terms, manager approval, and customer-ready PDF output.

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PRIMARY USERS

**Sales Executives, Sales Managers**

COVERS

**Quotation builder, approval queue,  
PDF output**

# Win Trust With a Professional Proposal

Create formal commercial proposals from qualified inquiries — with pricing, terms, manager approval, and customer-ready PDF output.

## What You Can Do

- Build quotations with product lines, discounts, and terms
- Submit for manager approval when required
- Preview and download branded quotation PDF
- Convert approved quotations to pending orders

## How It Works

- 1 Create quotation from inquiry
- 2 Add products and commercial terms
- 3 Manager reviews and approves
- 4 Share PDF with customer
- 5 Convert to order on acceptance

Quotation builder with technical and commercial sections.

Inline PDF preview of the approved quotation.

Quotation No.	Date	Customer Name	Mobile	Branch	Total Invoice	Next Approval
2025743	07 Jun 2026	Naveen Kumar	+9192297926	Shikha Branch	₹1,74,999	PENDING APPROVAL
2025817	1 Mar 2026	Ravi Rajan	+9192284792	Gota	₹18,000	PENDING APPROVAL
2025778	07 Apr 2026	Siddhi	+9198798036	Gota	₹1,81,000	PENDING APPROVAL
2025482	07 Apr 2026	Ravi Rajan	+9198798036	Gota	₹18,000	PENDING APPROVAL
2025719	07 Apr 2026	Siddhi	+9198798036	Gota	₹1,81,000	PENDING APPROVAL
2024343	07 Apr 2026	Ravi Rajan	+9192297926	Gota	₹1,74,999	PENDING APPROVAL
2024840	07 Apr 2026	Ravi Rajan	+9192297926	Gota	₹1,81,000	PENDING APPROVAL
2025883	07 Apr 2026	Ravi Rajan	+9198798036	Gota	₹1,81,000	PENDING APPROVAL
2024932	06 Jun 2026	Shikha	+9192297926	Gota	₹1,74,999	PENDING APPROVAL
2025813	06 Apr 2026	Shikha	+9192297926	Gota	₹1,81,000	PENDING APPROVAL
2024768	4 Apr 2026	Tech Hind	+9198798036	Gota	₹1,74,999	PENDING APPROVAL

Manager approval queue with quotation detail sidebar.

# Order Lifecycle

Manage the complete B2C project journey from pending order through confirmation, execution stages, payments, and closure.

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PRIMARY USERS

**Operations, Sales, Project Coordinators**

COVERS

**Order pipeline, delivery, installation, payments**

# One Pipeline, Every Project Stage

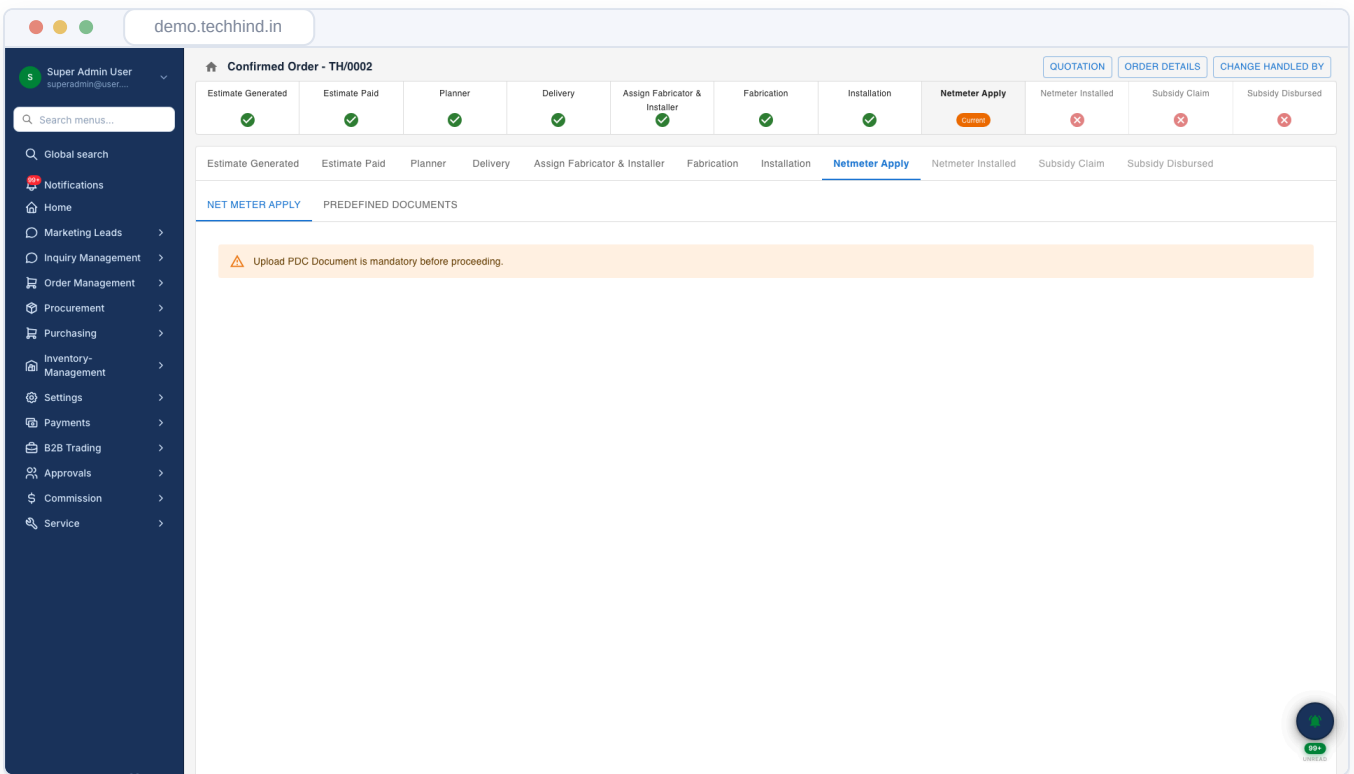
Manage the complete B2C project journey from pending order through confirmation, execution stages, payments, and closure.

## What You Can Do

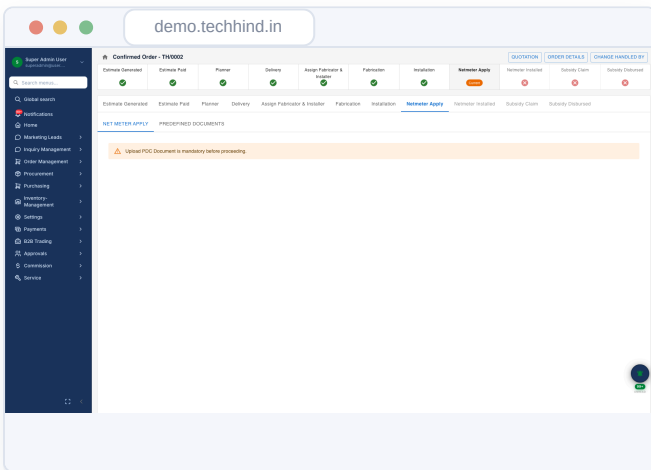
- Create and confirm orders from approved quotations
- View order pipeline with stage tabs: registration, documents, payments, delivery, installation, subsidy
- Record payments against milestones
- Open order detail drawer for quick access from lists
- Track amendments and document collection

## How It Works

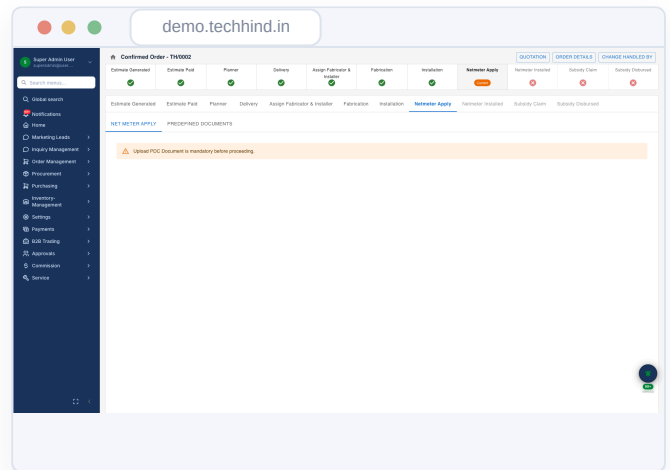
- 1 Quotation converts to pending order
- 2 Collect documents and confirm order
- 3 Progress through fabrication, delivery, and installation stages
- 4 Record payments and close project



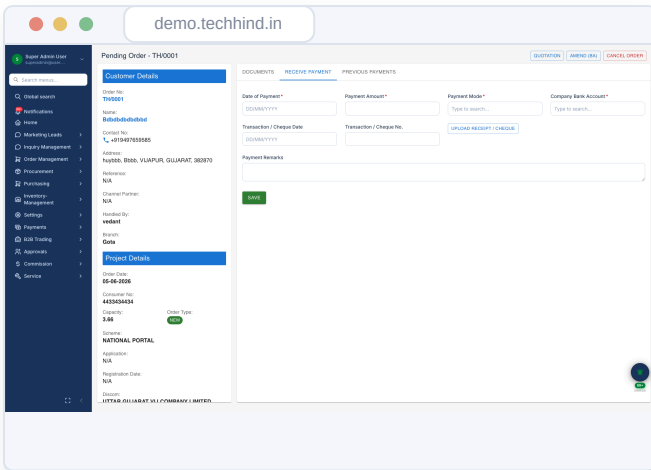
Full project command center with lifecycle stages.



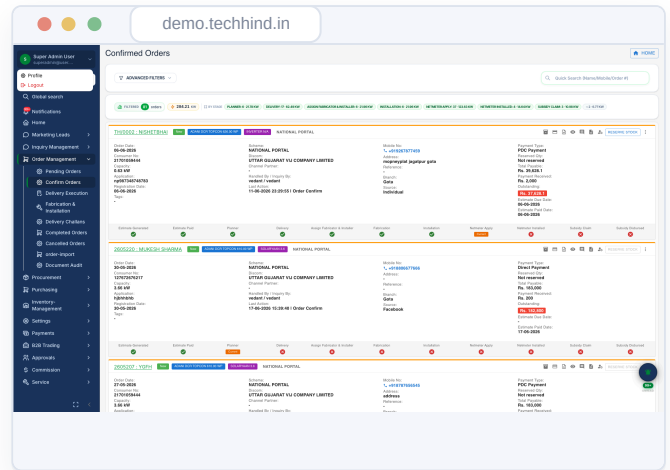
Delivery stage with challan management.



Installation tracking and serial capture.



Receive payment against order milestones.



Quick-view drawer for order summary from list.

### WHY IT MATTERS

Every stakeholder — sales, operations, finance — works from the same order record, so nothing falls through the cracks between teams.

# Fabrication, Installation & Delivery

Coordinate field execution after order confirmation — shop fabrication, on-site installation, warehouse dispatch, and delivery proof.

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PRIMARY USERS

**Fabrication Team, Installation Engineers, Warehouse**

COVERS

**Execution board, approval drawer, delivery challans**

# From Workshop to Rooftop

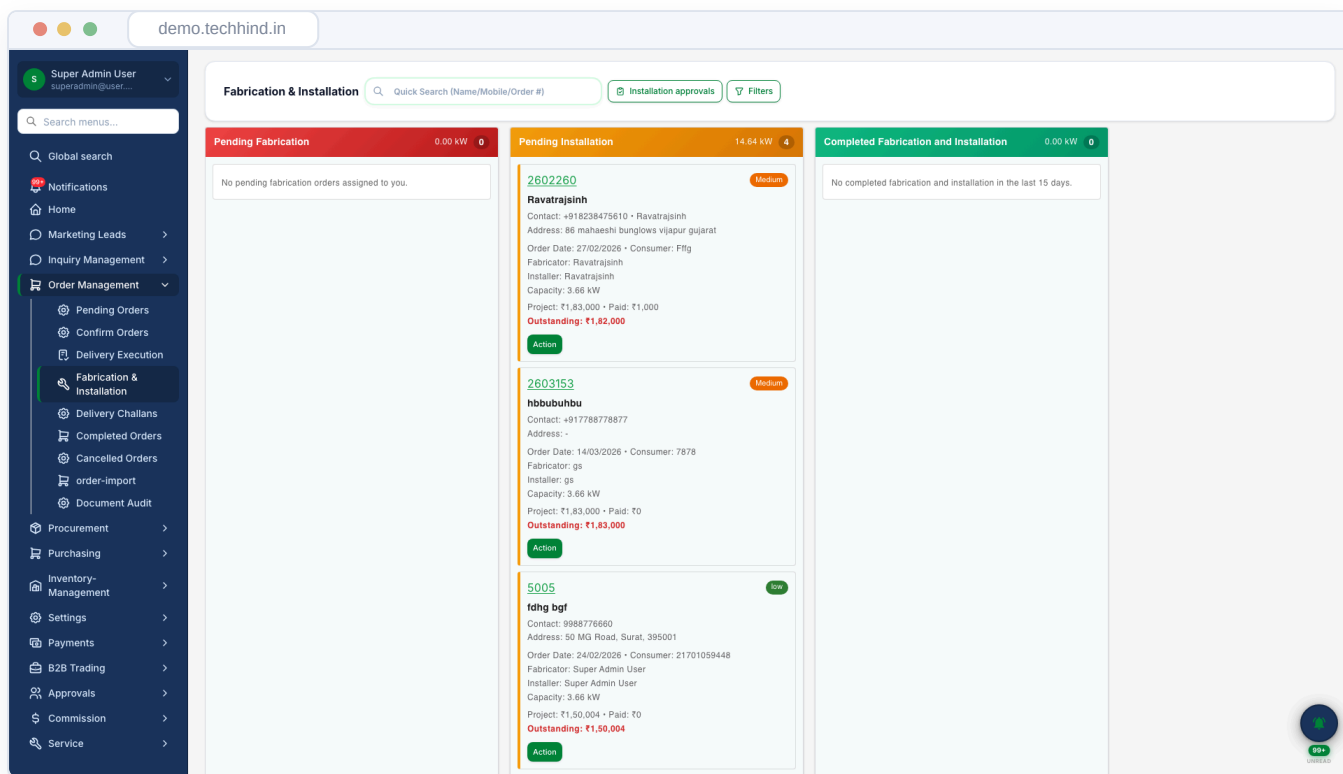
Coordinate field execution after order confirmation — shop fabrication, on-site installation, warehouse dispatch, and delivery proof.

## What You Can Do

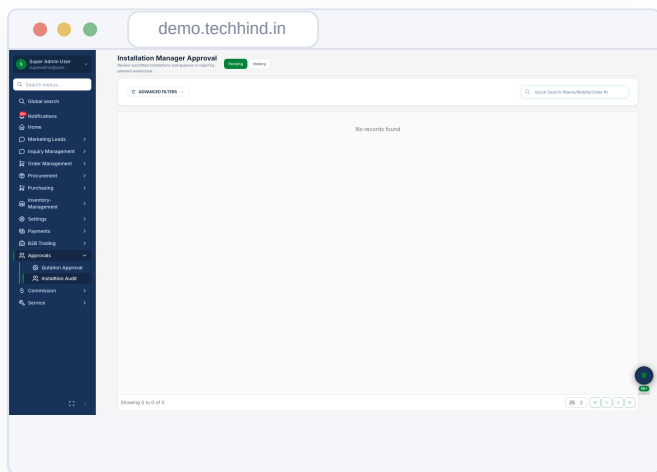
- Track fabrication and installation on a visual execution board
- Manager approves completed installations via review drawer
- Manage delivery on a kanban board with order detail drawer
- Create delivery challans for material dispatch

## How It Works

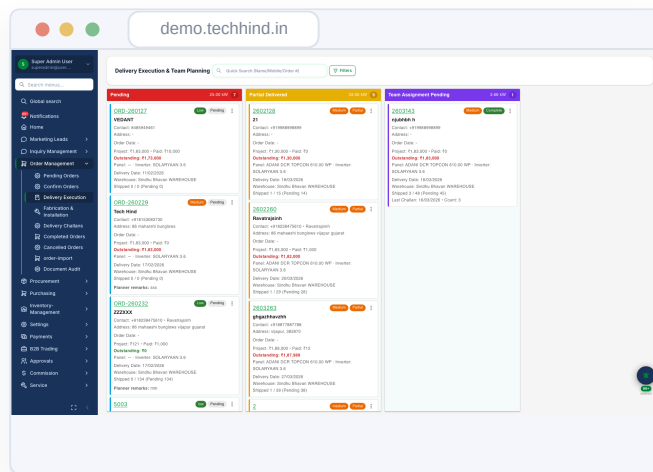
- 1 Order enters fabrication queue
- 2 Installation team completes on-site work with serial numbers
- 3 Manager approves installation
- 4 Warehouse creates challan and confirms delivery



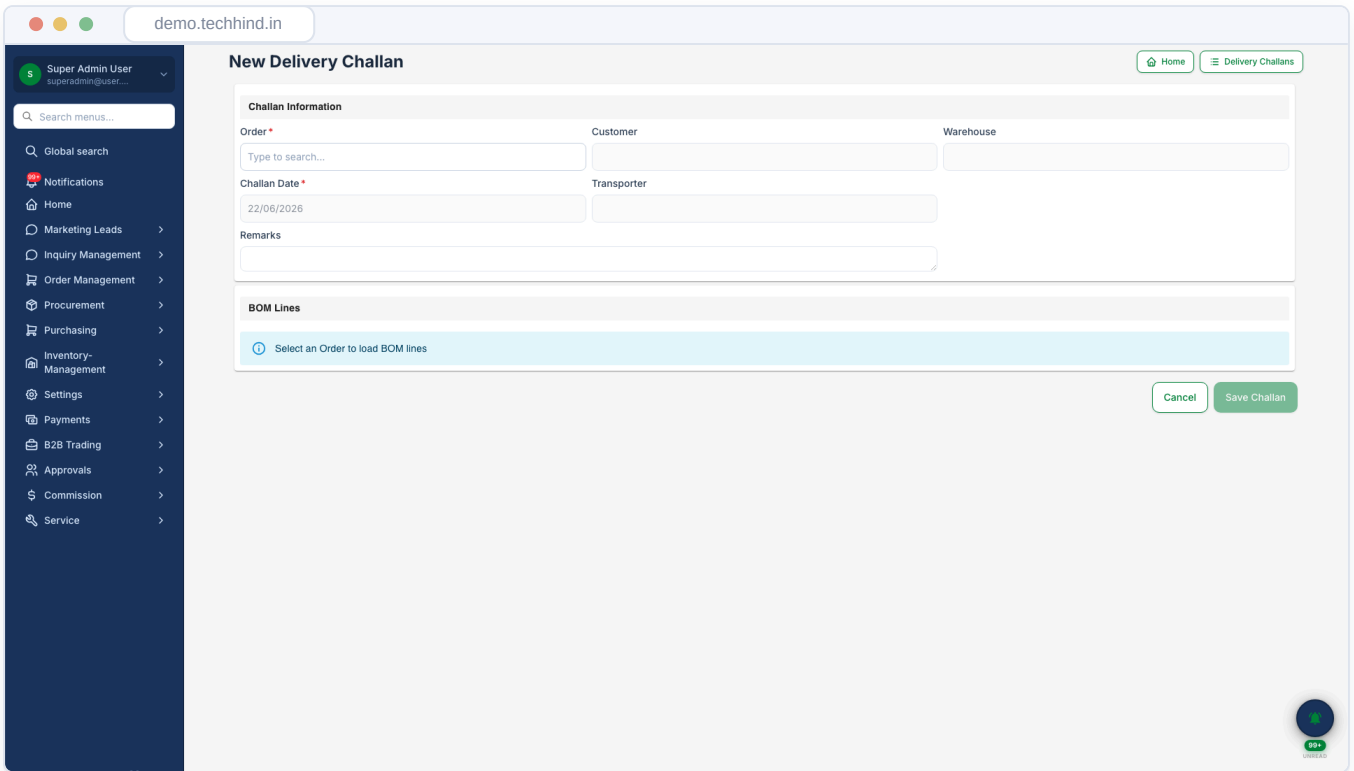
Fabrication and installation progress board.



Manager review drawer for installation sign-off.



Delivery kanban with order detail drawer.



New delivery challan creation.

CORE MODULE

10

# Payments & Outstanding

Give finance teams clear visibility on receivables, collection follow-ups, and payment approvals across B2C projects.

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PRIMARY USERS

**Finance, Accounts Receivable**

COVERS

**Outstanding dashboard, follow-ups,  
proof approval**

# Clear Visibility on Every Rupee Due

Give finance teams clear visibility on receivables, collection follow-ups, and payment approvals across B2C projects.

## What You Can Do

- Monitor outstanding amounts with KPI summary
- Schedule and record collection follow-ups via dialog
- Approve payment proofs submitted by field teams
- Export outstanding data for reporting

## How It Works

- 1 Payments link to order milestones at confirmation
- 2 Finance tracks outstanding by age and customer
- 3 Follow-up calls are scheduled and recorded
- 4 Payment proofs are reviewed and approved

**Payment Outstanding**

Report Summary

All orders with pending payment and quick actions.

Total Outstanding: ₹47,72,092.80 (ALL)
 Direct: ₹12,30,570.00 (DIRECT)
 Loan: ₹1,51,012.80 (LOAN)
 PDC: ₹7,35,644.00 (PDC)
 Unknown: ₹26,54,866.00 (UNKNOWN)

ACTIONS	ORDER #	CAP	CUSTOMER	MOBILE	TOTAL PAYABLE	PAID	OUTSTANDING	PAYMENT TYPE	LOAN TYPE	SUBSIDY DISB.	NETM. APPLY	DELIV. DATE	ORDR
	11	3.66	Rajesh Patel	9876543210	₹2,50,000.00	₹0.00	₹2,50,000.00	Direct Payment	-	-	-	12-03-2026	24-0
	2604152	3.66	pranay	+919835161825	₹2,13,989.00	₹2,000.00	₹2,11,989.00	PDC Payment	-	-	-	16-04-2026	14-0
	260393	3.66	Ravatrainsih Chauhan	+918238475610	₹1,83,150.00	₹0.00	₹1,83,150.00	Direct Payment	-	22-03-2026	21-03-2026	13-03-2026	13-0
	ORD-260252	3.66	AAAA	+918238475610	₹1,83,000.00	₹0.00	₹1,83,000.00	-	-	-	-	13-02-2026	11-0
	2602138	3.66	vvv	+918866569688	₹1,83,000.00	₹0.00	₹1,83,000.00	-	-	-	-	20-02-2026	17-0
	2602176	3.66	Ravatrainsih	+918238475610	₹1,83,000.00	₹0.00	₹1,83,000.00	-	-	-	-	18-02-2026	18-0
	ORD-260270	3.66	vedant data	+918485949461	₹1,83,000.00	₹0.00	₹1,83,000.00	-	-	-	-	12-02-2026	12-0
	ORD-260282	3.66	harsh	+9199999991	₹1,83,000.00	₹0.00	₹1,83,000.00	-	-	-	-	14-02-2026	12-0
	2602186	3.66	vedant	+918499889898	₹1,83,000.00	₹0.00	₹1,83,000.00	-	-	-	-	18-02-2026	18-0
	ORD-260110	3.66	VEDANT	8485949461	₹1,83,000.00	₹0.00	₹1,83,000.00	-	16-05-2026	25-01-2026	25-01-2026	17-0	
	ORD-260240	3.66	OGGQ	+918238475610	₹1,83,000.00	₹0.00	₹1,83,000.00	-	20-02-2026	12-02-2026	11-02-2026	11-0	
	2603143	3.66	ngubhh h	+919888988899	₹1,83,000.00	₹0.00	₹1,83,000.00	Direct Payment	-	-	-	16-03-2026	14-0
	2602146	3.66	driya	+917200990099	₹1,83,000.00	₹0.00	₹1,83,000.00	Direct Payment	-	-	-	19-02-2026	18-0
	2602230	3.66	vaa	+918877988899	₹1,83,000.00	₹0.00	₹1,83,000.00	-	-	-	-	18-02-2026	23-0
	2602154	3.66	Tech Hind	+91999999912	₹1,83,000.00	₹100.00	₹1,82,900.00	-	-	-	-	21-02-2026	19-0
	2604218	3.66	Smtibhai prime	+918877339286	₹1,82,500.00	₹100.00	₹1,82,400.00	PDC Payment	-	-	-	24-04-2026	22-0
	ORD-260264	3.66	ZzZZZ	+918238475610	₹1,83,000.00	₹1,000.00	₹1,82,000.00	-	12-02-2026	13-02-2026	12-02-2026	11-0	
	260128	3.66	vedant chauhan	19	₹1,83,000.00	₹1,044.00	₹1,81,956.00	-	-	-	-	16-05-2026	17-0
	2605126	3.66	vgdvgdvgd	+91877676543	₹1,83,001.00	₹2,000.00	₹1,81,001.00	PDC Payment	-	18-05-2026	18-05-2026	20-05-2026	18-0
	260345	3.66	Ravatrainsih	+9182384756	₹1,83,000.00	₹5,000.00	₹1,78,000.00	-	27-03-2026	27-03-2026	08-03-2026	06-0	
	260568	3.24	TIRTH	+918877660099	₹1,62,254.00	₹2,000.00	₹1,60,254.00	PDC Payment	-	15-05-2026	14-05-2026	16-05-2026	14-0

Showing 1 to 25 of 25 entries

Outstanding dashboard with collection KPIs.

Payment Follow Up - 11

Contacted At: 22-05-2026, 07:30 PM

Status: Call

Send Status / Reason

Next Follow Up: 26/05/2026

Collection follow-up scheduling dialog.

Payment Audit

ENTRY DATE	BRANCH	CUSTOMER	STATUS	TOTAL PAYABLE	INTEREST AMOUNT	DISB	PAYMENT MODE	RECEIPT #	ATTACHMENT
04-04-2024	IND002	hishana	Gen	₹58,634	₹0.00	₹58,634	CASH	KOPT-64-W022255	...
04-04-2024	260397	Shruti Shrivastava	Gen	₹63,077	₹18,171	₹63,077	CASH	KOPT-63-WP022247	...
02-06-2024	260580	denandhar	Gen	₹75,441	₹18,441	₹75,441	CASH	KOPT-62-WP022243	...
30-09-2024	260520	MUKESH SHARMA	Gen	₹63,000	₹0.00	₹63,000	CASH	KOPT-61-WP022272	...
24-09-2024	260580	denandhar	Gen	₹75,441	₹18,441	₹75,441	CASH	KOPT-60-WP022243	...
22-05-2026	260577	gubhanshambhan	Gen	₹63,000	₹16,300	₹63,000	CASH	-	...
22-05-2026	260577	gubhanshambhan	Gen	₹63,000	₹16,300	₹63,000	CASH	KOPT-58-WP022268	...
22-05-2026	260580	Vikas	Gen	₹63,000	₹0.00	₹63,000	CASH	KOPT-56-WP022260	...
22-05-2026	260580	Vikas	Gen	₹63,000	₹0.00	₹63,000	CASH	-	...
21-05-2026	260491	Ramangam	Gen	₹63,000	₹0.00	₹63,000	CASH	-	...
21-05-2026	260491	Ramangam	Gen	₹63,000	₹0.00	₹63,000	CASH	KOPT-54-WP022262	...
20-05-2026	260576	Ramangam	Gen	₹63,000	₹0.00	₹63,000	CASH	-	...
20-05-2026	260576	Ramangam	Gen	₹63,000	₹0.00	₹63,000	CASH	KOPT-52-WP022260	...
18-05-2026	260568	gubhanshambhan	Gen	₹63,000	₹16,300	₹63,000	CASH	-	...
18-05-2026	260568	gubhanshambhan	Gen	₹63,000	₹16,300	₹63,000	CASH	KOPT-49-WP022262	...
18-05-2026	260526	vgdvgdvgd	Gen	₹63,000	₹0.00	₹63,000	CASH	KOPT-48-WP022262	...
16-05-2026	260576	vedant	Gen	₹63,000	₹0.00	₹63,000	CASH	KOPT-47-WP022262	...
16-05-2026	260582	RAA	Gen	₹63,000	₹0.00	₹63,000	CASH	KOPT-45-WP022262	...

Showing 1 to 25 of 55 entries

Payment proof approval workflow.

# Procurement & Inventory

Manage solar component supply — from purchase orders and goods receipt through stock levels and serial number tracking.

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PRIMARY USERS

**Warehouse, Purchasing**

COVERS

**Purchase orders, goods receipt, stock levels**

# Supply Chain, Tracked End to End

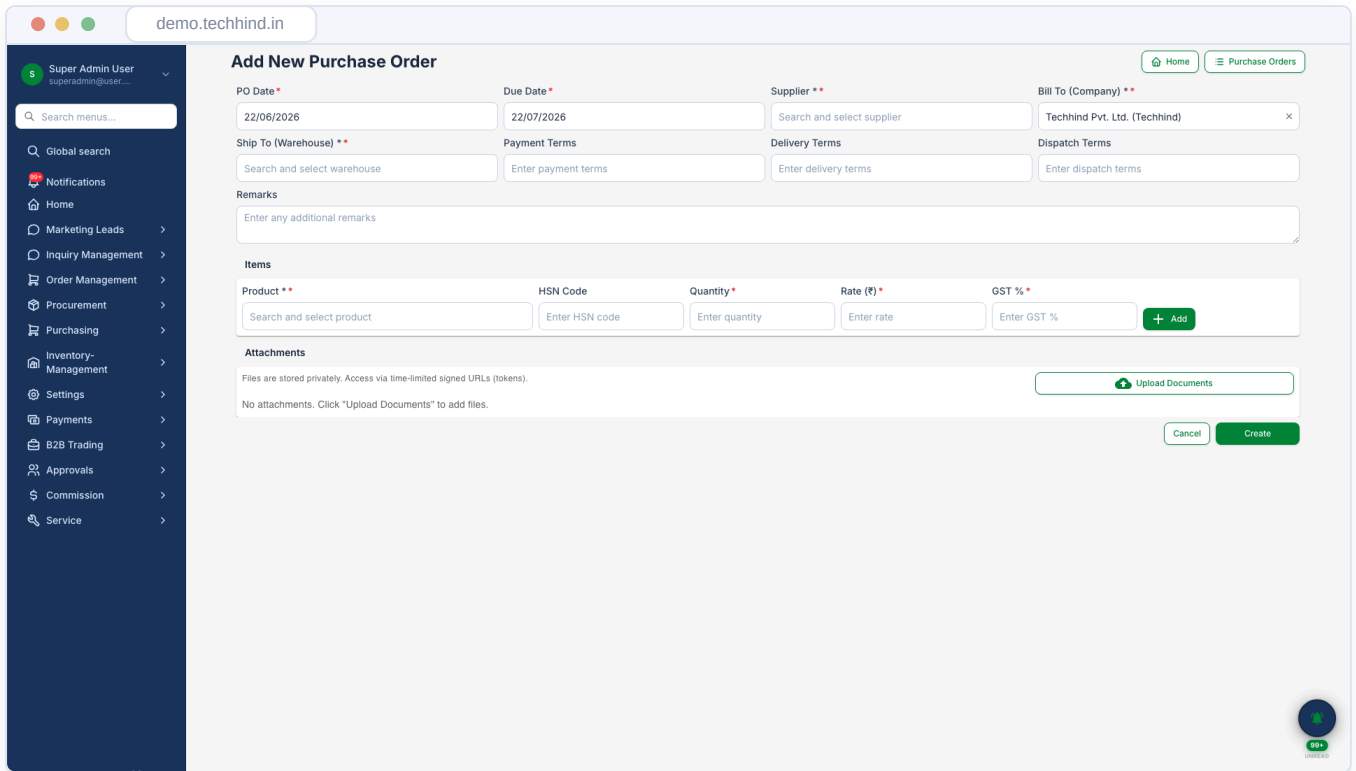
Manage solar component supply — from purchase orders and goods receipt through stock levels and serial number tracking.

## What You Can Do

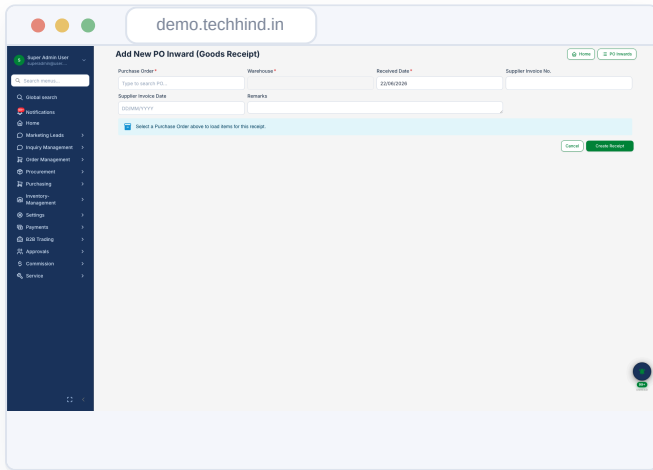
- Create purchase orders with line items and supplier terms
- Record goods receipt against POs with serial capture
- View current stock levels by warehouse and product
- Track serialized inventory for panels and inverters

## How It Works

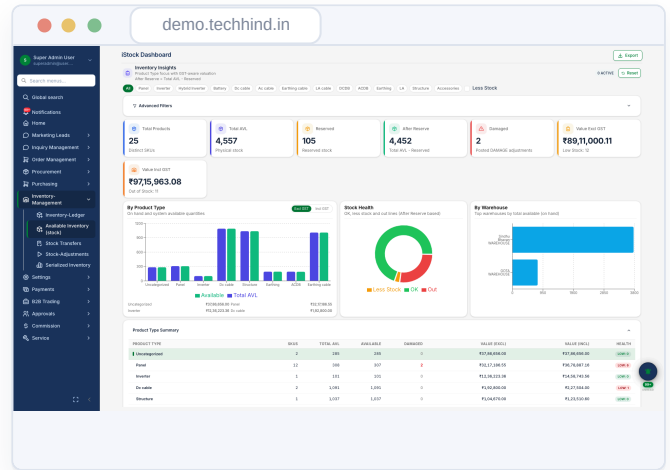
- 1 Raise purchase order to supplier
- 2 Receive goods and update stock
- 3 Serial numbers registered at inward
- 4 Stock reserved and issued against orders and challans



Purchase order creation with product lines.



Goods receipt against purchase order.



Current stock levels by warehouse.

# B2B Trading

Support dealer and distributor sales — quotes, orders, shipments, and invoicing — separate from residential B2C projects.

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PRIMARY USERS

**B2B Sales, Finance**

COVERS

**Dealer quotes, sales orders, invoicing**

# A Dedicated Channel for Dealers and Distributors

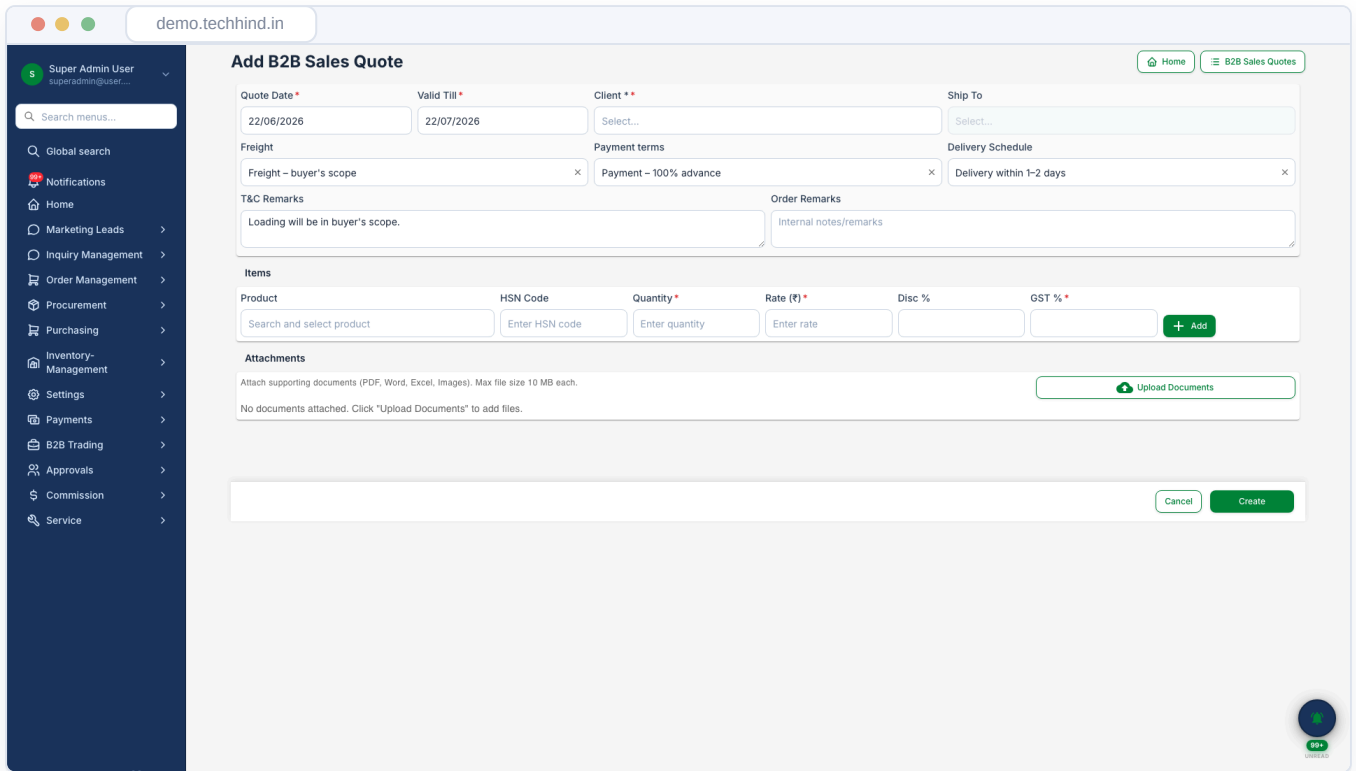
Support dealer and distributor sales — quotes, orders, shipments, and invoicing — separate from residential B2C projects.

## What You Can Do

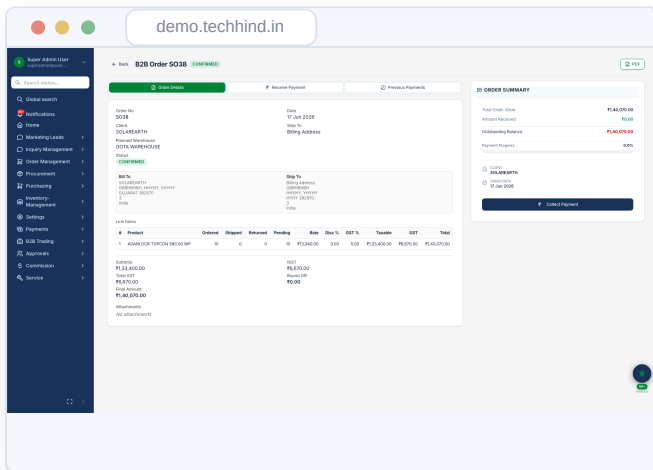
- Create B2B sales quotes with GST line items
- Manage sales orders with payment tracking
- View invoice detail in sidebar with line items and client info
- Track B2B outstanding payments

## How It Works

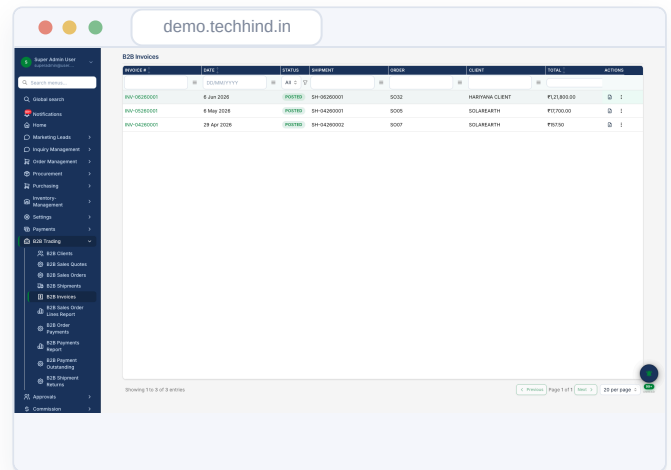
- 1 Create quote for B2B client
- 2 Convert to sales order and confirm
- 3 Ship against order with serial tracking
- 4 Generate invoice and record payment



B2B quotation builder.



B2B sales order with payment tabs.



Invoice detail sidebar with line items.

# Commission Management

Automate sales partner and channel incentive tracking — from accrual through manager approval to payout.

---

PRIMARY USERS

**Finance, Sales Managers**

COVERS

**Rate setup, settlement approval,  
payout history**

# Partner Incentives, Without the Spreadsheet

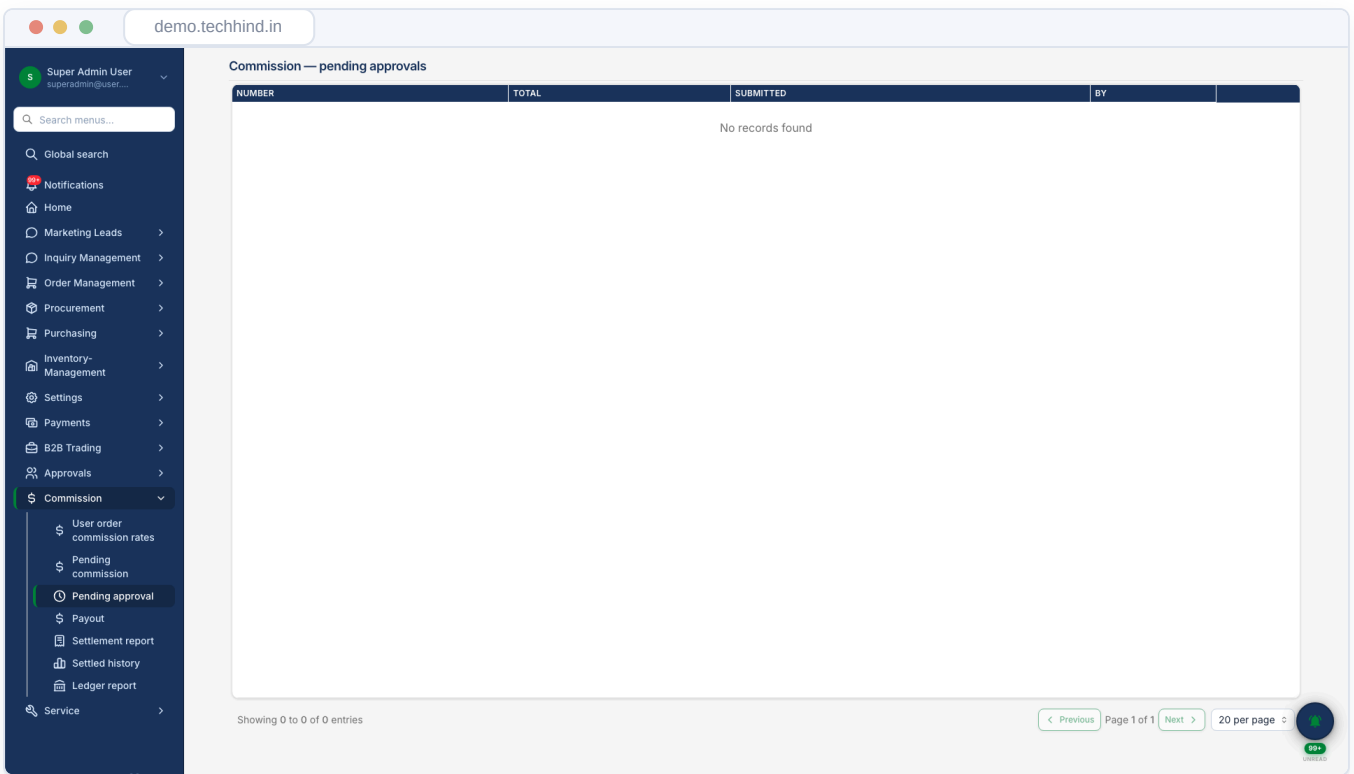
Automate sales partner and channel incentive tracking — from accrual through manager approval to payout.

## What You Can Do

- Configure commission rates per user
- Review pending settlements in approval drawer
- Process payouts and view settlement history

## How It Works

- 1 Orders generate commission accruals
- 2 Finance batches unsettled entries
- 3 Manager approves in review drawer
- 4 Payout recorded and archived



Settlement approval drawer with order-level commission detail.

**WHY IT MATTERS**

Channel partners get paid accurately and on time, with a full audit trail from order to payout — no manual reconciliation at month end.

# Service & Warranty

Handle after-sales support for installed projects — service tickets, warranty claims, and field material requests linked to original order data.

---

PRIMARY USERS

**Service Team, Technicians**

COVERS

**Service dashboard, ticket detail,  
warranty claims**

# After-Sales Support, Linked to the Original Order

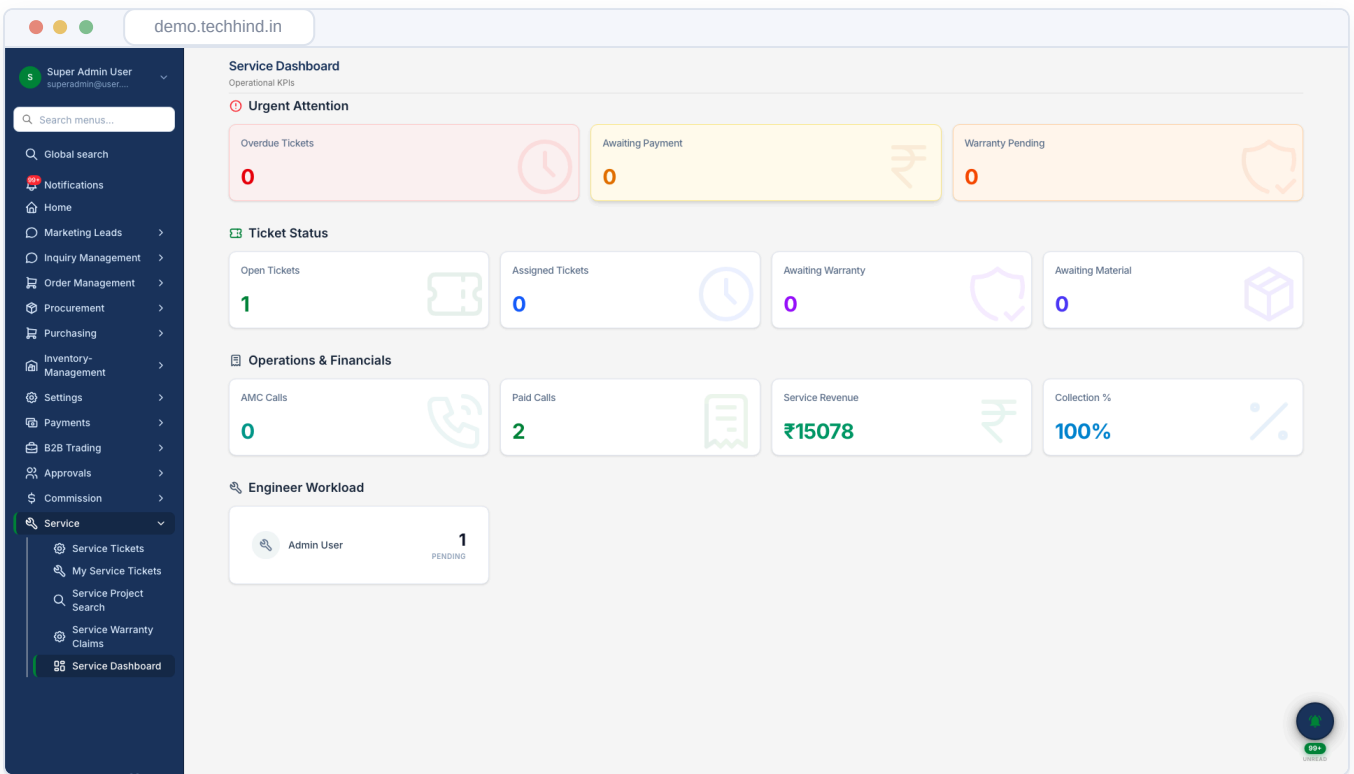
Handle after-sales support for installed projects — service tickets, warranty claims, and field material requests linked to original order data.

## What You Can Do

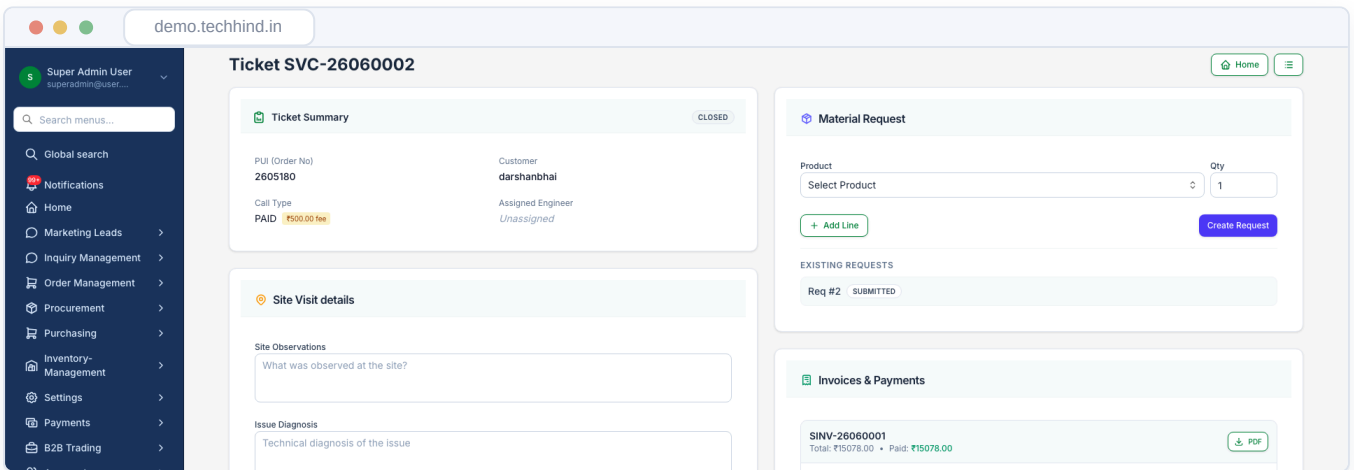
- Monitor service workload on operations dashboard
- Manage tickets with assignment, site visits, and resolution
- Open ticket detail with full lifecycle and customer context
- Process warranty claims

## How It Works

- 1 Customer issue raised as service ticket
- 2 Ticket assigned to technician with priority
- 3 Site visit and materials if needed
- 4 Ticket closed; warranty claim if applicable



Service operations KPIs and workload.



Service ticket with customer, order, and resolution history.

# Reports & Audit

Provide management and finance with standardized reports and compliance visibility across payments and documents.

---

PRIMARY USERS

**Finance, Management, Compliance**

COVERS

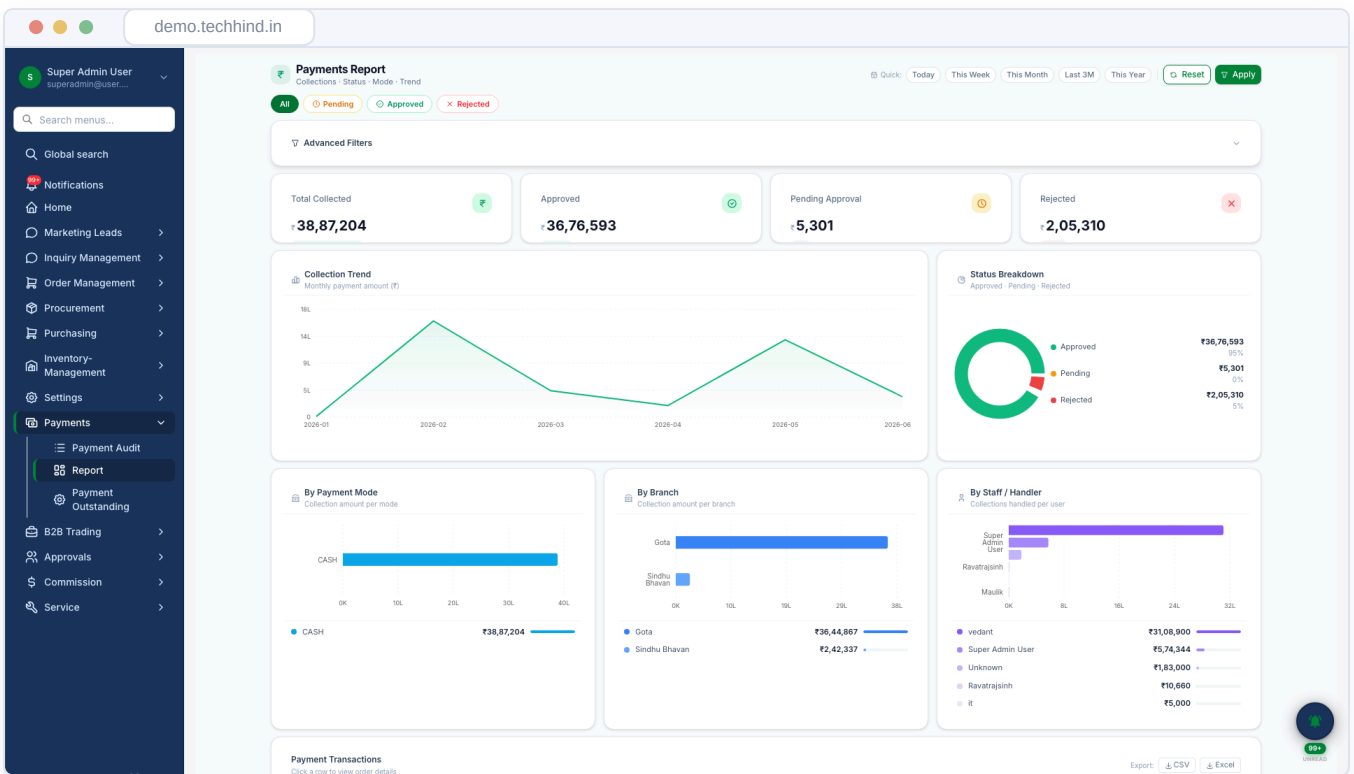
**Payments report, payment audit,  
document audit**

## Standardized Reporting, Built In

Provide management and finance with standardized reports and compliance visibility across payments and documents.

### What You Can Do

- Run payments report for collection analysis
- Review payment audit for approval history
- Track document audit for upload and approval trail



B2C payments report for finance review.

**WHY IT MATTERS**

Standardized reports mean management and auditors get consistent numbers without waiting on a manual export from each team.

# Settings & Administration

Configure your organization in the platform — company details, branches, warehouses, bank accounts, users, roles, and reference data.

---

PRIMARY USERS

**Admin, IT**

COVERS

**Company profile, users, roles, module access**

# Your Organization, Configured Your Way

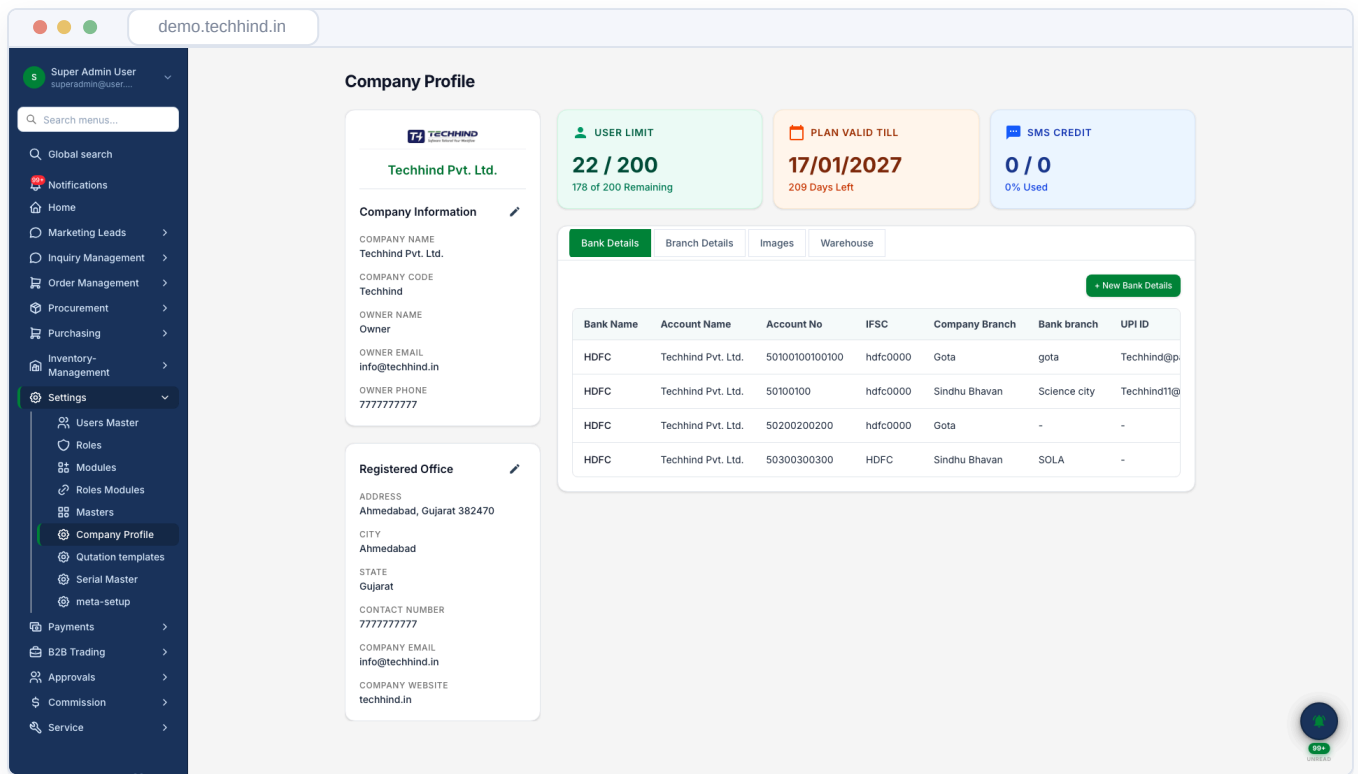
Configure your organization in the platform — company details, branches, warehouses, bank accounts, users, roles, and reference data.

## What You Can Do

- Set up company profile with logo, branches, and warehouses
- Manage users and assign roles
- Configure which modules each role can access
- Maintain reference masters (DISCOM, payment modes, document types, etc.)

## How It Works

- 1 Admin sets company profile and branches
- 2 Roles defined for job functions
- 3 Module permissions assigned per role
- 4 Users created and linked to roles and branches



Organization setup with company, branches, warehouses, and bank accounts.

# Document Outputs

Branded, print-ready documents at every stage of the business relationship — built from your company profile, shared directly with customers, dealers, banks, and DISCOM authorities.

---

COVERS

**Quotation, order, invoice, receipt, warranty, challan**

BRANDING SOURCE

**Company Profile settings**

# Professional Documents for Customers and Partners

TechHind Solar CRM produces branded, print-ready documents at every stage of the business relationship. These outputs reflect your company identity and can be shared directly with customers, dealers, banks, and DISCOM authorities.

## ■ Quotation PDF

Formal commercial proposals with product line items, pricing, terms and conditions, and technical specifications. Managers approve quotations before PDF generation; sales teams share the document with customers for sign-off.

## ■ Order Document

Comprehensive order summary including customer details, project scope, payment schedule, and commercial terms — generated from confirmed project data.

## ■ B2B Invoice

Tax-compliant invoices for dealer and distributor sales, generated from shipments with GST line-item breakdown.

## ■ Payment Receipt

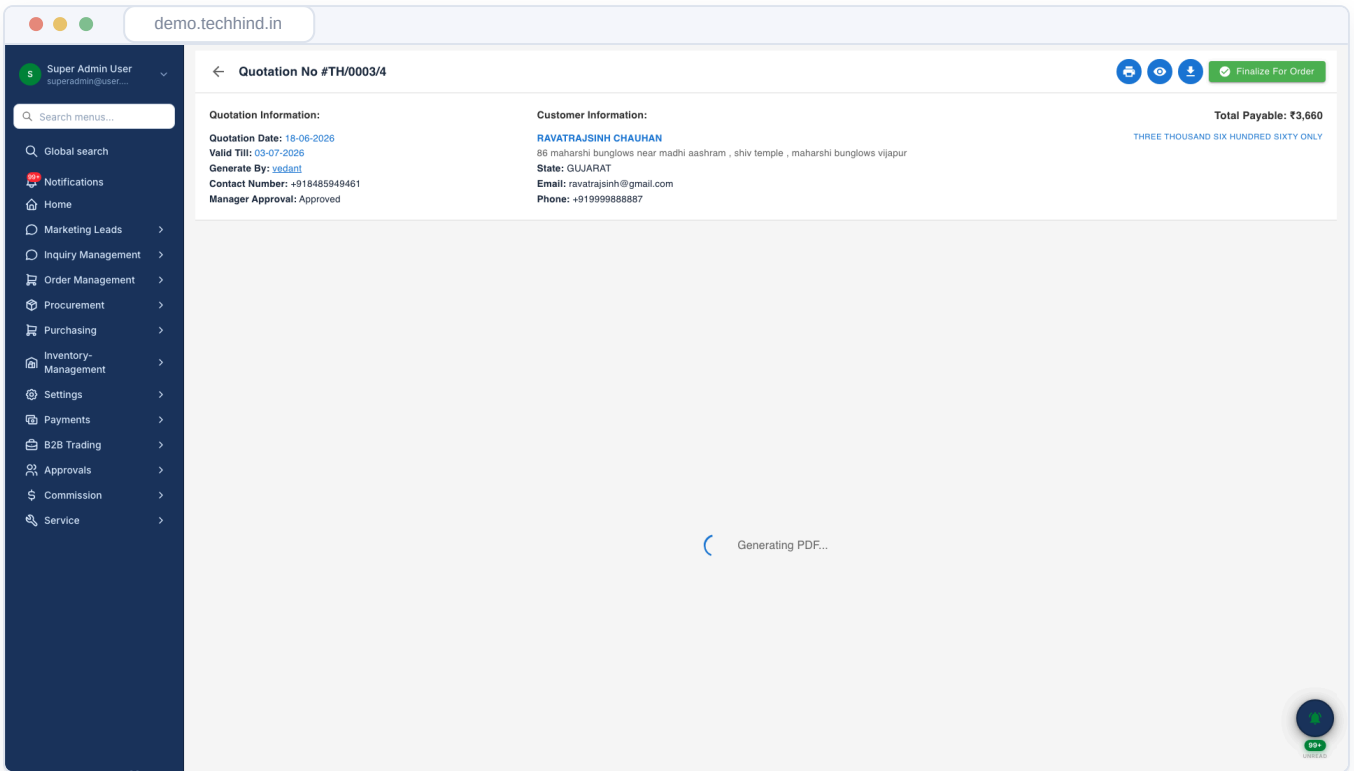
Receipt PDFs for recorded payments against order milestones — useful for customer acknowledgment and accounts reconciliation.

## ■ Warranty Card

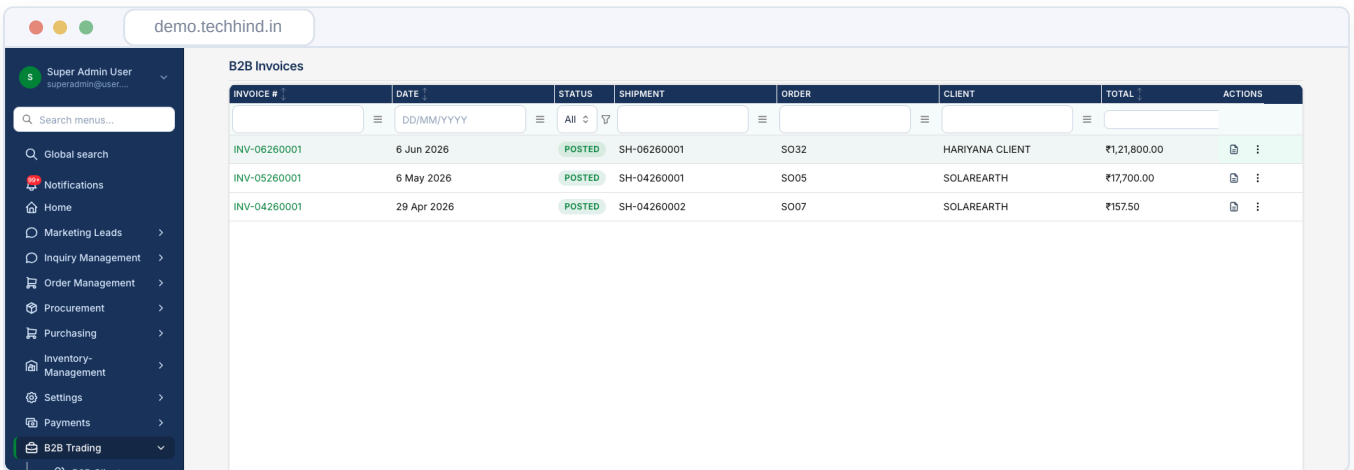
Digital warranty card for installed systems, linked to serial numbers and installation date. Customers can verify warranty status through a public lookup page.

## ■ Delivery Challan

Material dispatch documents for warehouse-to-site delivery, with product quantities and serial numbers where applicable.



Branded quotation with inline PDF preview before sharing with the customer.



B2B invoice with line items and client details.

## Why It Matters for Your Business

DOCUMENT	BUSINESS USE
Quotation PDF	Win customer trust with professional proposals
Order PDF	Formal agreement and project reference
B2B Invoice	Dealer billing and GST compliance
Payment receipt	Collection proof and customer records
Warranty card	After-sales confidence and brand credibility
Delivery challan	Logistics proof and inventory traceability

### SET ONCE, USED EVERYWHERE

All documents use your company profile settings — logo, address, bank details, and terms configured once in administration.

PUTTING IT TOGETHER

# Three journeys that tie every module together.

Individual modules are powerful on their own. The real value shows up in how they connect — a lead becomes an installed project, a purchase order becomes shippable stock, a dealer quote becomes a reconciled invoice. The next three chapters trace those complete journeys stage by stage.

---

CHAPTER 18

**Lead to Installation**

CHAPTER 19

**Procurement to Stock**

CHAPTER 20

**B2B Order to Invoice**

# Workflow: Lead to Installation

The complete B2C customer journey — from the first marketing touchpoint through installed and commissioned solar project.

---

STAGES

**8, from lead capture to after-sales**

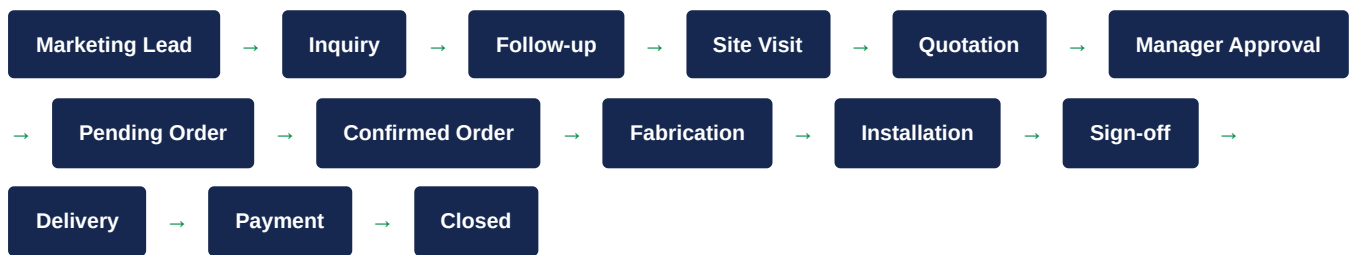
ROLES INVOLVED

**10, sales through service**

# The Complete B2C Customer Journey

This workflow describes the complete B2C customer journey in TechHind Solar CRM — from the first marketing touchpoint through installed and commissioned solar project.

## Process Flow



## Stage Details

- 1 Lead Capture**  
**MARKETING LEADS & META INTEGRATION**  
**Action:** Lead arrives via Meta campaign, CSV, or manual entry  
**Output:** Qualified lead record with source and campaign attribution
- 2 Inquiry Qualification**  
**INQUIRY MANAGEMENT**  
**Action:** Convert lead to inquiry; record customer details, capacity, location, DISCOM  
**Output:** Active inquiry in sales pipeline
- 3 Follow-up & Site Assessment**  
**FOLLOW-UP, SITE VISIT**  
**Action:** Schedule calls; conduct on-site survey; attach documents  
**Output:** Technically qualified opportunity
- 4 Commercial Proposal**  
**QUOTATIONS**  
**Action:** Create quotation from inquiry; apply pricing; submit for approval  
**Output:** Approved quotation PDF shared with customer

5

**Order Confirmation****ORDER LIFECYCLE****Action:** Convert quotation to pending order; collect documents; confirm order**Output:** Confirmed order entering execution

6

**Field Execution****FABRICATION, INSTALLATION & DELIVERY****Action:** Shop fabrication; on-site installation with serial capture; manager sign-off; delivery challan**Output:** Installed and delivered system

7

**Financial Closure****PAYMENTS & OUTSTANDING, COMMISSION****Action:** Record payments; clear outstanding; commission accrual and settlement**Output:** Closed order with full financial reconciliation

8

**After-Sales (ongoing)****SERVICE & WARRANTY****Action:** Service tickets and warranty claims as needed**Output:** Customer support with warranty traceability

## Key Decision Points

DECISION	MODULE	TYPICAL APPROVER
Quotation approval	Quotations	Sales manager
Order confirmation	Orders	Operations / sales
Installation sign-off	Installation	Installation manager
Commission settlement	Commission	Finance manager

## Roles Involved



## Related Chapters

CHAPTER	TOPIC
05	Marketing Leads & Meta
06	Inquiry Management
07	Quotations
08	Order Lifecycle
09	Fabrication, Installation & Delivery
10	Payments & Outstanding

# Workflow: Procurement to Stock

The supply chain path from vendor engagement through available stock in the warehouse — the foundation for order fulfillment and B2B shipments.

---

STAGES

**7, from supplier setup to fulfillment**

TRACEABILITY

**Serial-level, panels and inverters**

# From Vendor to Warehouse-Ready Stock

This workflow covers the supply chain path from vendor engagement through available stock in the warehouse — the foundation for order fulfillment and B2B shipments.

## Process Flow



## Stage Details

- 1 Supplier & Catalog Setup**  
**SUPPLIER, PRODUCT, BOM, PROJECT PRICE**  
**Action:** Register vendors; maintain product catalog and BOM definitions  
**Output:** Master data ready for procurement
- 2 Purchase Order Creation**  
**PURCHASE ORDERS**  
**Action:** Create PO with line items, quantities, rates, and delivery terms  
**Output:** PO submitted for approval
- 3 Goods Receipt**  
**PO INWARD**  
**Action:** Receive goods against PO; capture quantities and serial numbers  
**Output:** Stock increased; ledger entry created

**4** **Stock Management**  
**STOCKS, INVENTORY LEDGER**  
**Action:** Monitor levels; review movement history  
**Output:** Real-time stock visibility by warehouse

**5** **Internal Movements (as needed)**  
**STOCK TRANSFERS, STOCK ADJUSTMENTS**  
**Action:** Move stock between warehouses; correct physical count variances  
**Output:** Accurate warehouse-level stock

**6** **Returns (if applicable)**  
**PURCHASE RETURNS**  
**Action:** Return goods to supplier; credit stock  
**Output:** Stock and ledger adjusted

**7** **Fulfillment Link**  
**ORDER LIFECYCLE, B2B TRADING**  
**Action:** Reserved stock allocated to confirmed orders or B2B shipments  
**Output:** Stock committed to customer demand

#### INVENTORY TRACEABILITY

Serialized products (panels, inverters) are tracked from PO Inward through Installation or B2B Shipment using the Serial Master configuration and Serialized Inventory Report.

## Key Controls

CONTROL	PURPOSE
PO approval	Prevent unauthorized purchases
Serial capture at inward	Enable end-to-end traceability
Inventory ledger	Immutable audit of all movements
Stock reservation	Prevent overselling

## Related Chapters

CHAPTER	TOPIC
11	Procurement & Inventory
08	Order Lifecycle
12	B2B Trading

# Workflow: B2B Order to Invoice

The B2B distribution sales cycle — from dealer or client engagement through invoicing and payment collection.

---

STAGES

7, including optional returns

COMPLIANCE

GST line-item calculation per HSN

# The Dealer & Distributor Sales Cycle

This workflow describes the B2B distribution sales cycle — from dealer/client engagement through invoicing and payment collection.

## Process Flow



## Stage Details

- 1 Client Onboarding**  
**B2B CLIENTS**  
**Action:** Register client with billing and ship-to addresses  
**Output:** Client master ready for transactions
- 2 Quotation**  
**B2B SALES QUOTES**  
**Action:** Create quote with products, quantities, rates, and GST  
**Output:** Quote PDF shared with dealer
- 3 Sales Order**  
**B2B SALES ORDERS**  
**Action:** Convert approved quote to sales order; confirm order  
**Output:** Confirmed SO with stock reservation

4

### Dispatch

#### B2B SHIPMENTS

**Action:** Pick, pack, and dispatch against SO; capture serial numbers

**Output:** Shipment record with stock deduction

5

### Invoicing

#### B2B INVOICES

**Action:** Generate invoice from shipment; produce PDF

**Output:** Tax invoice for dealer accounts

6

### Collections

#### B2B PAYMENT OUTSTANDING, B2B PAYMENTS REPORT

**Action:** Record payments; track outstanding; analyze collections

**Output:** Reconciled receivables

7

### Returns (if applicable)

#### B2B SHIPMENT RETURNS

**Action:** Process return; credit stock and adjust invoice

**Output:** Return documented with inventory correction

#### GST & COMPLIANCE

B2B transactions support GST line-item calculation per product HSN and client tax profile. Invoice PDFs include required tax breakdowns for dealer accounting.

## Key Metrics

METRIC	REPORT / SCREEN
Open orders	B2B Sales Orders
Shipment status	B2B Shipments
Outstanding	B2B Payment Outstanding
Line-level revenue	B2B Sales Order Lines Report
Collections	B2B Payments Report

## Related Chapters

CHAPTER	TOPIC
12	B2B Trading
11	Procurement & Inventory
10	Payments & Outstanding
15	Reports & Audit

## Ready to see it live?

Every screen in this handbook is from the working platform, not a prototype. The best next step is a guided walkthrough on your own data.

LIVE DEMO

[demo.techhind.in](https://demo.techhind.in)

WEBSITE

[techhind.in](https://techhind.in)

EMAIL

[info@techhind.in](mailto:info@techhind.in)