



Hariman Nexus

Business Operations Platform

Professional User Guide

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Document Purpose

This guide explains how business users operate Hariman Nexus. It is intended for PDF export, client delivery, internal training, and implementation support.

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3. Introduction

Hariman Nexus is a business operations platform designed to connect sales, CRM, accounts, inventory, and management workflows in one controlled workspace.

- Centralizes business records such as clients, vendors, projects, products, services, terms, invoices, payments, purchases, GRNs, and inventory.
- Improves visibility for business owners and directors through dashboard KPIs, reports, and alerts.
- Supports accountability through user roles, permissions, protected registration, notifications, and audit logs.
- Helps teams move from lead to quotation, invoice, payment, stock receipt, and reporting without scattered spreadsheets.

Module	What users do
Sales	Manage leads, opportunities, quotations, and customer conversion.
CRM	Track follow-ups, activities, and customer journey history.
Operations	Maintain clients, projects, services, products, terms, units, and warehouses.
Accounts	Control invoices, payments, expenses, reports, and cash flow.
Inventory	Receive goods through GRN, maintain stock ledger, and review stock reports.
Management	Review KPIs, reports, alerts, and audit activity.
Key Benefit Hariman Nexus helps teams use one shared source of truth for commercial, financial, and operational activity.	

4. Login and Access

Users enter Hariman Nexus through a secure login screen. Access to registration, modules, menus, and actions depends on the assigned role.

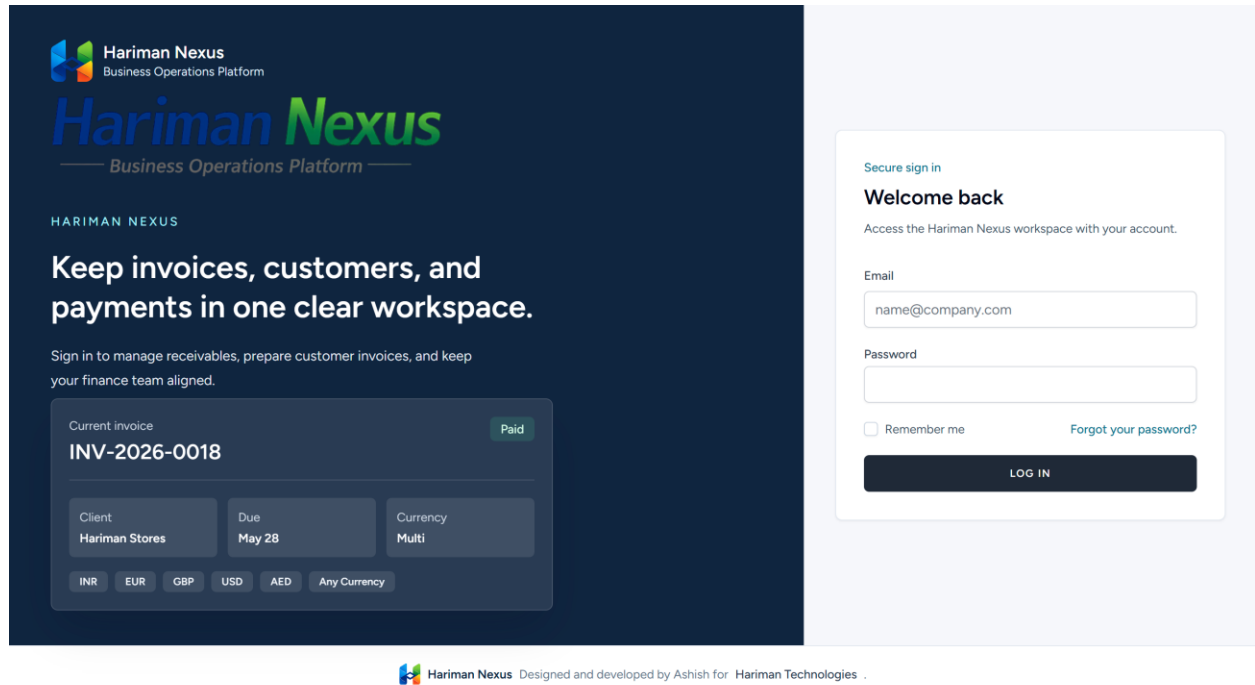


Figure 1: Hariman Nexus Login Page

How to sign in

1. Open the Hariman Nexus web address in the browser.
2. Enter the registered email address and password.
3. Select Login to open the workspace.
4. Use the profile menu for account options and logout.

User access management

- Registration is protected so only authorized users can create team members.
- Super Admin can manage users fully.
- Admin can register and activate or deactivate users according to access rules.
- Other roles see only the modules and actions permitted for their responsibilities.

5. Dashboard

The dashboard is the decision-making screen. It summarizes financial, operations, CRM, inventory, and alert information.

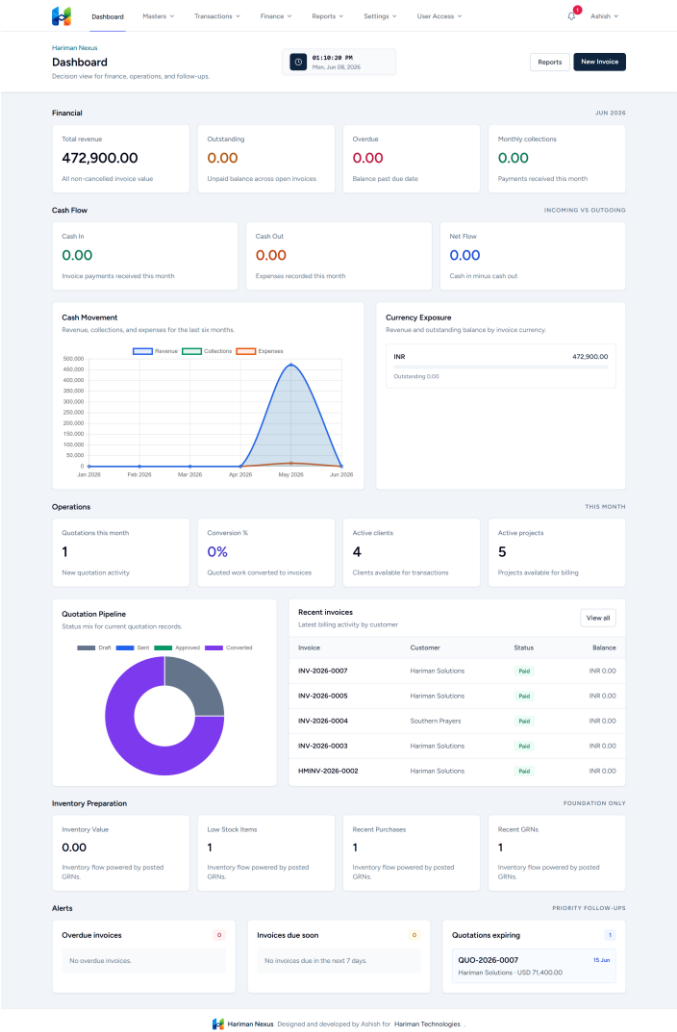


Figure 2: Dashboard Analytics

KPI Area	Examples
Financial	Total revenue, outstanding invoices, overdue invoices, monthly collections.
Operations	Quotations this month, conversion percentage, active clients, active projects.
Inventory	Inventory value, low stock items, recent GRNs, recent purchases.
Alerts	Invoice due reminders, overdue alerts, CRM follow-up reminders, notification bell.
Dashboard Tip	

Review the notification bell and overdue indicators at the start of each workday.

6. Masters / Operations Setup

Masters are the foundation records used across the application. Keep these records accurate before creating transactions.

Module	What users do
Clients	Add customer profiles, local or abroad type, contact details, search, edit, and active/inactive status.
Vendors	Maintain supplier records, contact person, phone, email, tax details, address, payment terms, and status.
Projects	Create project records with start date, expected delivery, assigned person, and status.
Products	Maintain product code, price, cost, reorder level, inventory flag, and stock-related details.
Services	Maintain billable services with short name, long name, default rate, and status.
Terms	Maintain quotation and invoice terms; click a term name to preview full content.
Units	Maintain units such as NOS, KG, BOX, LTR, MTR, PKT, and CTN.
Warehouses	Maintain warehouse locations for GRN and stock reporting.

Dashboard

Masters

Transactions

Finance

Reports

Settings

User Access

Ashish

Operations

Clients

01:10:56 PM

Mon, Jun 08, 2020

Projects

Add Client

Create billing-ready client profiles linked to sales projects.

Client Name

Project

Select Project

Client Type

Select Type

Status

Active

Email

Phone

+1234567890

Address

☐ Tax Applicable

Tax %

ADD CLIENT

Client List

Showing the latest clients first.

5 clients

Search clients...

Search

Code	Client	Contact	Tax	Status	Actions
LC-2026-0005 Local	BluePeak Services CRM Converted Clients	anita@bluepeak.example +918233990304	No Tax	Active	Edit
LC-2026-0004 Local	Sonu Handicraft Hariman Artisan	ashish@hariman.com +918107337907	No Tax	Active	Edit
LC-2026-0003 Local	Lazy Panda Kids Store Lazy Panda Kids	lazypandakids@gmail.com +91923456789	No Tax	Inactive	Edit
LC-2026-0002 Local	Southern Prayers SouthernPrayers	admin@southernprayers.com +919324490991	Tax 5.00%	Active	Edit
LC-2026-0001 Local	Hariman Solutions Hariman Nexus	ashish.dev.test@gmail.com +918233990399	Tax 2.00%	Active	Edit

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Figure 3: Masters / Operations Setup Listing

6.1 Client and Vendor Master Usage

Client and vendor records should be created before quotations, invoices, purchases, expenses, or reports are used.

Add Client
Create billing-ready client profiles linked to sales projects.

Client Name: Project:

Client Type: Status:

Email: Phone:

Address:

☐ Tax Applicable Tax %:

ADD CLIENT

Client List
Showing the latest clients first.

Search clients... **Search** 5 clients

Code	Client	Contact	Tax	Status	Actions
LC-2026-0005 Local	BluePeak Services CRPH Converted Clients	anita@bluepeak.example +918233990304	No Tax	Active	Edit
LC-2026-0004 Local	Sonu Handicraft Hariman Artisan	ashish@hariman.com +918107337907	No Tax	Active	Edit
LC-2026-0003 Local	Lazy Panda Kids Store Lazy Panda Kids	lazypandakids@gmail.com +91923456789	No Tax	Inactive	Edit
LC-2026-0002 Local	Southern Prayers SouthernPrayers	admin@southernprayers.com +919324430991	Tax 5.00%	Active	Edit
LC-2026-0001 Local	Hariman Solutions Hariman Nexus	ashish.dev.test@gmail.com +918233990399	Tax 2.00%	Active	Edit

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Figure: Clients and Vendors

Recommended steps

- Open Masters and select Clients or Vendors.
- Search first to avoid creating duplicate records.
- Add the record with complete contact, country, email, phone, and tax details.
- Use Edit to correct details or change active/inactive status.
- Archive only when the record is no longer required and has no active business use.

User checks

- Client type is selected correctly as local or abroad.
- Vendor contact person and payment terms are accurate.
- Inactive records are not used for new transactions.

6.2 Project, Product, and Service Setup

Projects, products, and services are used to build quotations, invoices, purchases, GRNs, and inventory reports.

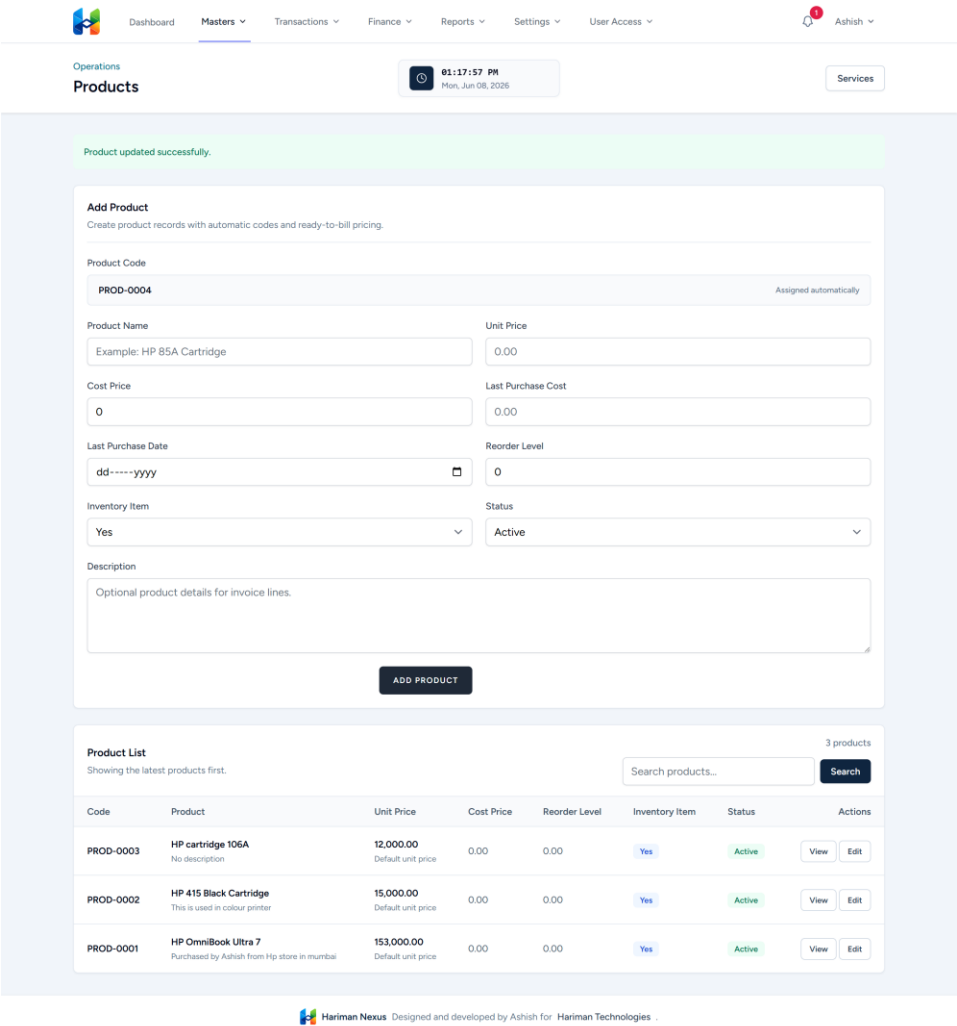


Figure: Products and Services

Recommended steps

- 10. Create projects with clear names and start dates.
- 11. Create products with product code, selling price, cost price, reorder level, and inventory item status.
- 12. Create services with a short internal name, long client-facing name, and default rate.
- 13. Review status before using records in transactions.

User checks

- Inventory products are marked as inventory items.
- Service names are understandable to customers.
- Project status is active before billing against it.

6.3 Terms, Units, and Warehouses

Terms, units, and warehouses standardize how documents and stock records are prepared.

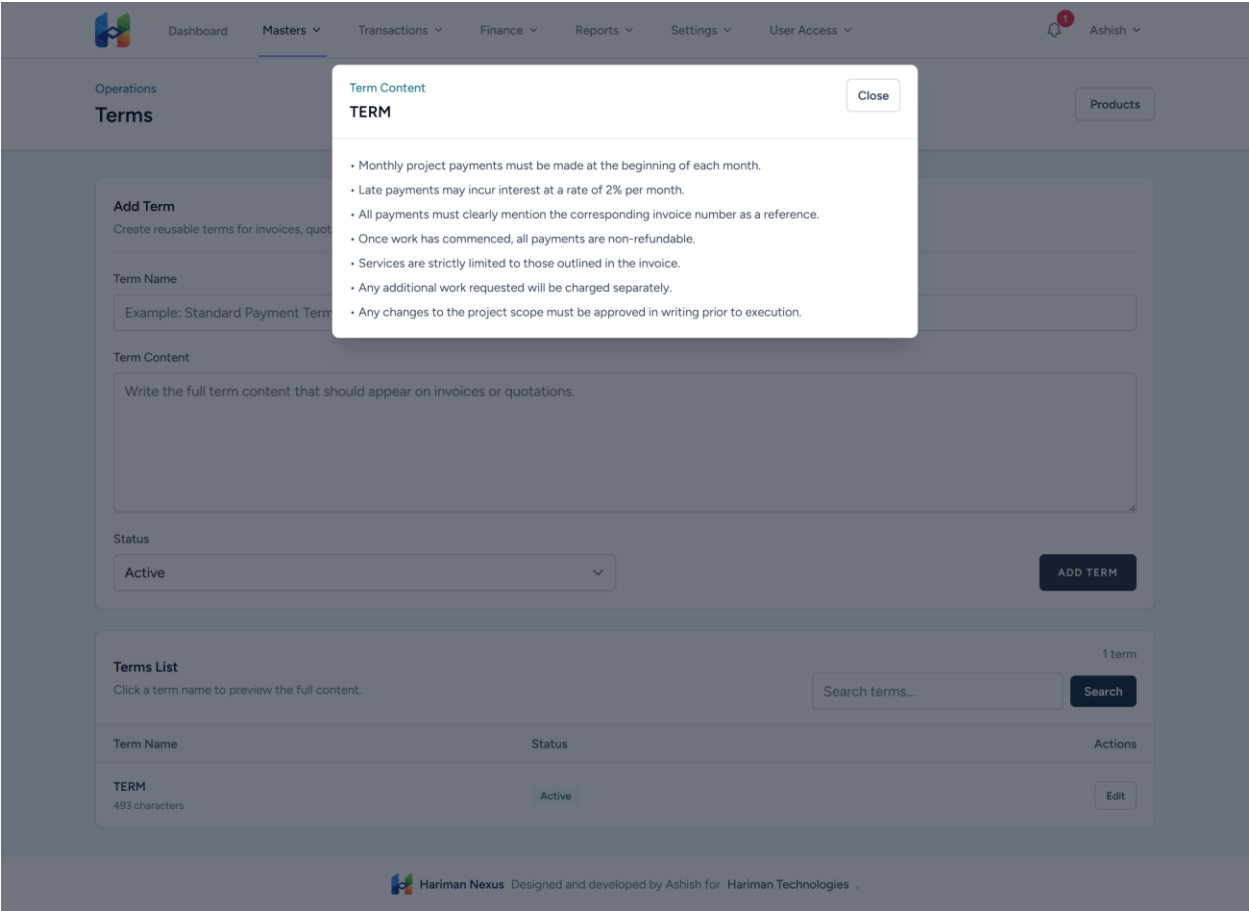


Figure: Terms Units Warehouses

Recommended steps

- 14. Create terms for common quotation and invoice conditions.
- 15. Create units such as NOS, KG, BOX, LTR, MTR, PKT, and CTN.
- 16. Create warehouses for every physical stock location.
- 17. Use inactive status when a warehouse or unit should no longer be used.

User checks

- Terms are reviewed before sending quotations.
- Units are short and consistent.
- Warehouses match real receiving/storage locations.

7. CRM Module

The CRM module helps sales and operations teams manage the customer journey from first enquiry to conversion.

CRM Journey

Lead

->

Follow-Up

->

Opportunity

->

Quotation

->

Client

Dashboard

Masters

Operations

Transactions

Finance

Reports

Settings

User Access

Ashish

Operations / CRM

Leads

01:53:37 PM
Mon, Jun 08, 2026

Lead Management

Create Lead

Capture enquiries, assign ownership, and move opportunities through the CRM pipeline.

Company Name

Example: Northline Works

Contact Person

Primary contact name

Email

lead@example.com

Phone

+91...

Country

Example: India

Source

Select source

Assigned To

Unassigned

Status

New

Remarks

Conversation notes, requirements, next step...

ADD LEAD

Lead List

Track sources, owners, statuses, and follow-up readiness.

5 leads

Search lead number, coi

All statuses

All sources

All conversions

All assignees

Filter

Reset

dd- - - - - yyyy

dd- - - - - yyyy

Lead Number	Company Name	Contact Person	Phone	Email	Country	Source	Assigned To	Status	Cre Date
LD-2026-0001	Acme Manufacturing	Raj Mehta	+918233990301	raj@acme.example	India	Website	Ashish	Qualified	02 J
LD-2026-0002	Northline Logistics	Priya Nair	+918233990302	priya@northline.example	India	LinkedIn	Ashish	Contacted	02 J
LD-2026-0003	Harbor Retail Group	Sanjay Rao	+918233990303	sanjay@harbor.example	UAE	Referral	Ashish	Proposal Sent	02 J
LD-2026-0004	BluePeak Services	Anita Shah	+918233990304	anita@bluepeak.example	India	Google	Ashish	Won - Converted	02 J
LD-2026-0005	Metro Parts Hub	Vikram Jain	+918233990305	vikram@metro.example	India	Exhibition	Ashish	Lost	02 J

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Figure 8: CRM Lead Timeline

Core CRM records

Module	What users do
Leads	Capture company name, contact person, email, phone, source, assigned user, status, and remarks.
Follow-Ups	Schedule calls, WhatsApp, email, meetings, video calls, visits, and next action

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	dates.
Opportunities	Track expected revenue, closing date, probability, stage, and assigned user.
Activities	View timeline entries such as lead created, follow-up completed, opportunity updated, quotation sent, and conversion.
Lead Conversion	Convert won leads into operational clients while preserving CRM history.

7.1 Lead Management

Lead Management is used to record new enquiries and assign responsibility for the first business response.

Create Lead
Capture enquiries, assign ownership, and move opportunities through the CRM pipeline.

Company Name: Contact Person:

Email: Phone:

Country: Source:

Assigned To: Status:

Remarks:

ADD LEAD

Lead List
Track sources, owners, statuses, and follow-up readiness. 5 leads

Search lead number, co: All statuses: All sources: All conversions: All assignees: **Filter** **Reset**

Lead Number	Company Name	Contact Person	Phone	Email	Country	Source	Assigned To	Status	Cre Date
LD-2025-0001	Acme Manufacturing	Raj Mehta	+918233990301	raj@acme.example	India	Website	Ashish	Qualified	02 J
LD-2025-0002	Northline Logistics	Priya Nair	+918233990302	priya@northline.example	India	LinkedIn	Ashish	Contacted	02 J
LD-2025-0003	Harbor Retail Group	Sanjay Rao	+918233990303	sanjay@harbor.example	UAE	Referral	Ashish	Proposal Sent	02 J
LD-2025-0004	BluePeak Services	Anita Shah	+918233990304	anita@bluepeak.example	India	Google	Ashish	Won - Converted	02 J
LD-2025-0005	Metro Parts Hub	Vikram Jain	+918233990305	vikram@metro.example	India	Exhibition	Ashish	Lost	02 J

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Figure: Lead Management

Recommended steps

- Open Operations > CRM > Leads.
- Create a lead with company name, contact person, source, status, and assigned user.
- Use search and filters to review active leads.
- Update lead status as the conversation progresses.
- Convert a Won lead to Client when it becomes a customer.

User checks

- Every lead has a responsible user.
- Lead source is selected consistently.
- Converted leads show conversion information and client link.

7.2 Follow-Ups and Activities

Follow-ups keep the sales team accountable for calls, WhatsApp messages, meetings, visits, and next actions.

The screenshot displays the 'Follow-Ups' module in the Hariman Nexus CRM. The top navigation bar includes links to Dashboard, Masters, Operations (selected), Transactions, Finance, Reports, Settings, and User Access. A user profile for 'Ashish' is visible in the top right.

The main content area is titled 'Follow-Ups' and includes a clock showing '01:53:58 PM Mon, Jun 08, 2026' and a 'Leads' button.

Create Follow-Up
Record sales interactions and schedule the next action without losing lead context.

The form contains the following fields:

- Lead:** A dropdown menu labeled 'Select lead'.
- Follow-Up Date:** A date picker showing '08-Jun-2026'.
- Follow-Up Type:** A dropdown menu labeled 'Select type'.
- Assigned User:** A dropdown menu showing 'Ashish - ashish@hariman.com'.
- Status:** A dropdown menu showing 'Pending'.
- Next Follow-Up Date:** A date picker showing 'dd-----yyyy'.
- Notes:** A text area with the placeholder 'Interaction summary, customer response, next action...'.

An 'ADD FOLLOW-UP' button is located at the bottom of the form.

Follow-Up List
Search, filter, and review CRM interactions by owner, lead, type, and due date.

The list includes filters for 'Search lead, assignee', 'All statuses', 'All types', 'All users', 'All leads', and date ranges. The table below shows the results:

Lead Number	Company Name	Follow-Up Date	Type	Assigned User	Status	Next Follow-Up Date	Actions
No follow-ups found.							

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Figure: CRM Follow-Ups

Recommended steps

23. Create a follow-up from the Follow-Ups module or directly from a lead profile.
24. Set follow-up date, type, assigned user, status, and notes.
25. Complete the follow-up after the action is performed.
26. Schedule the next follow-up when more action is required.
27. Review the activity timeline from the lead view.

User checks

- Pending follow-ups are not left overdue.
- Completed follow-ups include meaningful notes.
- Timeline entries show the latest activity first.

7.3 Opportunity Tracking

Opportunities represent potential business value and help management review the sales pipeline.

Create Opportunity
Convert qualified leads into forecastable sales opportunities.

Lead: Expected Revenue:

Expected Closing Date: Probability %:

Stage: Assigned User:

Remarks:

ADD OPPORTUNITY

Summary Cards:

- Open Opportunities: 3
- Won Opportunities: 1
- Lost Opportunities: 1
- Pipeline Value: 655,000.00
- Upcoming Closings: 3

Opportunity Pipeline Report

Stage	Count	Total Revenue	Expected Revenue	Conversion %
Qualification	0	0.00	0.00	0%
Discovery	1	85,000.00	21,250.00	20%
Proposal	1	250,000.00	125,000.00	20%
Negotiation	1	320,000.00	240,000.00	20%
Final Review	0	0.00	0.00	0%
Won	1	140,000.00	140,000.00	20%
Lost	1	95,000.00	0.00	20%

Opportunity List
Search and filter active pipeline opportunities.

Search opportunity: All stages: All users: All leads: Probability: dd-----yyyy

Opportunity Number	Lead Number	Company Name	Expected Revenue	Expected Closing Date	Probability	Stage	Assigned User	Created Date	
OPP-2026-0003	LD-2026-0003	Harbor Retail Group	320,000.00	07 Jul 2026	75%	Negotiation	Ashish	02 Jun 2026	View Edit
OPP-2026-0001	LD-2026-0001	Acme Manufacturing	250,000.00	22 Jun 2026	50%	Proposal	Ashish	02 Jun 2026	View Edit
OPP-2026-0002	LD-2026-0002	Northline Logistics	85,000.00	12 Jun 2026	25%	Discovery	Ashish	02 Jun 2026	View Edit
OPP-2026-0004	LD-2026-0004	BluePeak Services	140,000.00	28 May 2026	100%	Won	Ashish	02 Jun 2026	View Edit
OPP-2026-0005	LD-2026-0005	Metro Parts Hub	95,000.00	21 May 2026	0%	Lost	Ashish	02 Jun 2026	View Edit

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Figure: Opportunity Pipeline

Recommended steps

28. Create an opportunity for a qualified lead.
29. Enter expected revenue, closing date, probability, stage, assigned user, and remarks.
30. Move the stage as the deal progresses.
31. Review opportunity dashboard cards and pipeline reports.
32. Mark opportunity Won or Lost when the outcome is known.

User checks

- Revenue values are realistic.
- Probability is between 0 and 100 percent.
- Upcoming closings are reviewed regularly.

8. Quotations

Quotations are used to prepare commercial offers before invoicing. Approved quotations can be converted into invoices.

Create Quotation
Build service, product, or mixed quotations and keep the quotation list on the same page.

Quotation Date: 08-Jun-2026 | Validity Date: 22-Jun-2026 | Currency: Select currency

Client: Select client | Project: Select project | Tax: No tax / use client tax

Terms: No terms

Offer Builder
Add service or product rows. Rates can be adjusted per quotation.

Type	Item	Qty	Rate	Total
Service	Search item...	1	0	0.00

SUBTOTAL: 0.00 | TAX: 0.00 | TOTAL: 0.00

Quotation List
Latest quotations appear first.

Quotation	Client	Dates	Total	Status	Actions
QUO-2026-0007 Hariman Artisan	Hariman Solutions LC-2026-0001	Jun 04, 2026 Valid until Jun 15, 2026	\$ 71,400.00 Tax 1,400.00	Draft	View Status Edit Duplicate Delete PDF Send
QUO-2026-0004 SouthernPrayers	Southern Prayers LC-2026-0002	May 22, 2026 Valid until Jun 05, 2026	₹ 63,000.00 Tax 3,000.00	Converted	View Status Duplicate Delete PDF
QUO-2026-0003 Hariman Nexus	Hariman Solutions LC-2026-0001	May 22, 2026 Valid until Jun 05, 2026	₹ 175,440.00 Tax 3,440.00	Converted	View Status Duplicate Delete PDF
QUO-2026-0001 Hariman Nexus	Hariman Solutions LC-2026-0001	May 22, 2026 Valid until Jun 05, 2026	₹ 171,360.00 Tax 3,360.00	Converted	View Status Duplicate Delete PDF

Figure 4: Create Quotation Screen

33. Open Transactions > Quotations.
34. Select client, project, currency, tax, and terms.
35. Add products, services, quantities, and rates.
36. Save the quotation.
37. Use View, Status, Edit, Duplicate, PDF, Send, or Convert according to the quotation stage.

Approval Rule

Once a quotation is approved, editing is restricted so the accepted commercial terms remain controlled.

8.1 Creating a Quotation

A quotation should clearly state what is being offered, to whom, at what rate, and under which terms.

Create Quotation
Build service, product, or mixed quotations and keep the quotation list on the same page.

Quotation Date: 08-Jun-2026
Validity Date: 22-Jun-2026
Currency: Select currency
Client: Select client
Project: Select project
Tax: No tax / use client tax
Terms: No terms

Offer Builder
Add service or product rows. Rates can be adjusted per quotation.

Type	Item	Qty	Rate	Total
Service	Search item...	1	0	0.00

SUBTOTAL: 0.00
TAX: 0.00
TOTAL: 0.00

Quotation List
Latest quotations appear first.

Quotation	Client	Dates	Total	Status	Actions
QUO-2026-0007 Hariman Artisan	Hariman Solutions LC-2026-0001	Jun 04, 2026 Valid until Jun 15, 2026	\$71,400.00 Tax 1,400.00	Draft	View Status Edit Duplicate Delete PDF Send
QUO-2026-0004 SouthernPrayers	Southern Prayers LC-2026-0002	May 22, 2026 Valid until Jun 05, 2026	₹ 63,000.00 Tax 3,000.00	Converted	View Status Duplicate Delete PDF
QUO-2026-0003 Hariman Nexus	Hariman Solutions LC-2026-0001	May 22, 2026 Valid until Jun 05, 2026	₹ 175,440.00 Tax 3,440.00	Converted	View Status Duplicate Delete PDF
QUO-2026-0001 Hariman Nexus	Hariman Solutions LC-2026-0001	May 22, 2026 Valid until Jun 05, 2026	₹ 171,360.00 Tax 3,360.00	Converted	View Status Duplicate Delete PDF

Figure: Create Quotation

Recommended steps

38. Open Transactions > Quotations.
39. Select client, project, currency, tax, and terms.
40. Add product and service rows using the item builder.
41. Check quantity, rate, subtotal, tax, and total.
42. Save the quotation and review it before sending.

User checks

- Client details are correct.
- Each line item has the right type and rate.
- Terms are appropriate for the offer.

8.2 Quotation Status and Approval

The status page controls commercial acceptance and locks approved quotations.

Create Quotation
Build service, product, or mixed quotations and keep the quotation list on the same page.

Quotation Date: 08-Jun-2026
Validity Date: 22-Jun-2026
Currency: Select currency
Client: Select client
Project: Select project
Tax: No tax / use client tax
Terms: No terms

Offer Builder
Add service or product rows. Rates can be adjusted per quotation.

Type	Item	Qty	Rate	Total
Service	Search item...	1	0	0.00

SUBTOTAL: 0.00
TAX: 0.00
TOTAL: 0.00

Quotation List
Latest quotations appear first.

Quotation	Client	Dates	Total	Status	Actions
QUO-2026-0007 Hariman Artisan	Hariman Solutions LC-2026-0001	Jun 04, 2026 Valid until Jun 15, 2026	\$71,400.00 Tax 1,400.00	Draft	View Status Edit Duplicate Delete PDF Send
QUO-2026-0004 Southern Prayers	Southern Prayers LC-2026-0002	May 22, 2026 Valid until Jun 05, 2026	₹ 63,000.00 Tax 3,000.00	Converted	View Status Duplicate Delete PDF
QUO-2026-0003 Hariman Nexus	Hariman Solutions LC-2026-0001	May 22, 2026 Valid until Jun 05, 2026	₹ 175,440.00 Tax 3,440.00	Converted	View Status Duplicate Delete PDF
QUO-2026-0001 Hariman Nexus	Hariman Solutions LC-2026-0001	May 22, 2026 Valid until Jun 05, 2026	₹ 171,360.00 Tax 3,360.00	Converted	View Status Duplicate Delete PDF

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Figure: Quotation Status

Recommended steps

43. Open Status from the quotation list.
44. Review quoted items and rates.
45. Adjust rates before approval if required.
46. Select Approve when the client accepts the quotation.
47. Select Reject when the quotation will not proceed.

User checks

- Approved quotations are no longer edited.
- Rejected quotations remain available for historical review.
- Approved quotations can be loaded into invoice creation.

9. Invoices

Invoices are used to bill customers and track payment status. Invoices can be created directly or loaded from an approved quotation.

Dashboard

Masters

Transactions

Finance

Reports

Settings

User Access

Ashish

Transactions

Invoices

01:28:58 PM
Mon, Jun 06, 2026

Invoice Workspace

Create Invoice

Build service, product, or mixed invoices and keep the invoice list on the same page.

Quotation

Invoice Date

Due Date

Currency

08-Jun-2026

22-Jun-2026

Select currency

Client

Project

Tax

Select client

Select project

No tax / use client tax

Terms

No terms

Invoice Builder

Add service or product rows. Rates can be adjusted per invoice.

Add Service

Add Product

Type

Item

Qty

Rate

Total

Service

Search item...

1

0

0.00

Remove

SUBTOTAL

TAX

TOTAL

0.00

0.00

0.00

SAVE INVOICE

Invoice List

Latest invoices appear first.

All Status

Filter

Invoice

Client

Dates

Total

Status

Actions

INV-2026-0007

Hariman Solutions
ERP Project

May 23, 2026
Due May 30, 2026

₹ 45,900.00
Balance 0.00

Paid

View
Overdue

Edit

Duplicate

Delete

PDF

Send

Reminder

Payment Status

INV-2026-0005

Hariman Solutions
Hariman Nexus

May 23, 2026
Due Jun 01, 2026

₹ 17,200.00
Balance 0.00

Paid

View
Overdue

Edit

Duplicate

Delete

PDF

Send

Reminder

Payment Status

INV-2026-0004

Southern Prayers
SouthernPrayers

May 22, 2026
Due Jun 05, 2026

₹ 63,000.00
Balance 0.00

Paid

View
Overdue

Edit

Duplicate

Delete

PDF

Send

Reminder

Payment Status

INV-2026-0003

Hariman Solutions
Hariman Nexus

May 22, 2026
Due Jun 05, 2026

₹ 171,360.00
Balance 0.00

Paid

View
Overdue

Edit

Duplicate

Delete

PDF

Send

Reminder

Payment Status

HMINV-2026-0002

Hariman Solutions
Hariman Nexus

May 22, 2026
Due Jun 05, 2026

₹ 175,440.00
Balance 0.00

Paid

View
Overdue

Edit

Duplicate

Delete

PDF

Send

Reminder

Payment Status

Hariman Nexus

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Figure 5: Invoice Workspace

- Create invoices with products, services, tax, currency, terms, and client details.
- Load approved quotations to avoid re-entering accepted details.
- Use View, Edit, Duplicate, Delete, PDF, Send, and Payment Status actions.
- Use Reminder and Overdue emails based on due date rules.

9.1 Creating an Invoice

Invoices should be created after a confirmed service, sale, delivery, or approved quotation.

Create Invoice
Build service, product, or mixed invoices and keep the invoice list on the same page.

Invoice Date: 08-Jun-2026 Due Date: 22-Jun-2026 Currency: Select currency

Client: Select client Project: Select project Tax: No tax / use client tax

Terms: No terms

Invoice Builder
Add service or product rows. Rates can be adjusted per invoice.

Type	Item	Qty	Rate	Total
Service	Search item...	1	0	0.00

SUBTOTAL: 0.00 TAX: 0.00 TOTAL: 0.00

Invoice List
Latest invoices appear first.

Invoice	Client	Dates	Total	Status	Actions
INV-2026-0007 ERP Project	Hariman Solutions LC-2026-0001	May 23, 2026 Due May 30, 2026	₹ 45,900.00 Balance 0.00	Paid	View Edit Duplicate Delete PDF Send Reminder Overdue Payment Status
INV-2026-0005 Hariman Nexus	Hariman Solutions LC-2026-0001	May 23, 2026 Due Jun 01, 2026	₹ 17,200.00 Balance 0.00	Paid	View Edit Duplicate Delete PDF Send Reminder Overdue Payment Status
INV-2026-0004 SouthernPrayers	Southern Prayers LC-2026-0002	May 22, 2026 Due Jun 05, 2026	₹ 63,000.00 Balance 0.00	Paid	View Edit Duplicate Delete PDF Send Reminder Overdue Payment Status
INV-2026-0003 Hariman Nexus	Hariman Solutions LC-2026-0001	May 22, 2026 Due Jun 05, 2026	₹ 171,360.00 Balance 0.00	Paid	View Edit Duplicate Delete PDF Send Reminder Overdue Payment Status
HMINV-2026-0002 Hariman Nexus	Hariman Solutions LC-2026-0001	May 22, 2026 Due Jun 05, 2026	₹ 175,440.00 Balance 0.00	Paid	View Edit Duplicate Delete PDF Send Reminder Overdue Payment Status

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Figure: Create Invoice

Recommended steps

48. Open Transactions > Invoices.
49. Create directly or use the Quotation button to load an approved quotation.
50. Review client, project, tax, currency, terms, and due date.
51. Check every item row before saving.
52. Save the invoice and review the printable view.

User checks

- Due date is correct.
- Currency and tax match the customer agreement.
- Invoice items match the actual billing requirement.

9.2 Invoice Follow-Up

Invoice follow-up helps accounts collect payments on time.

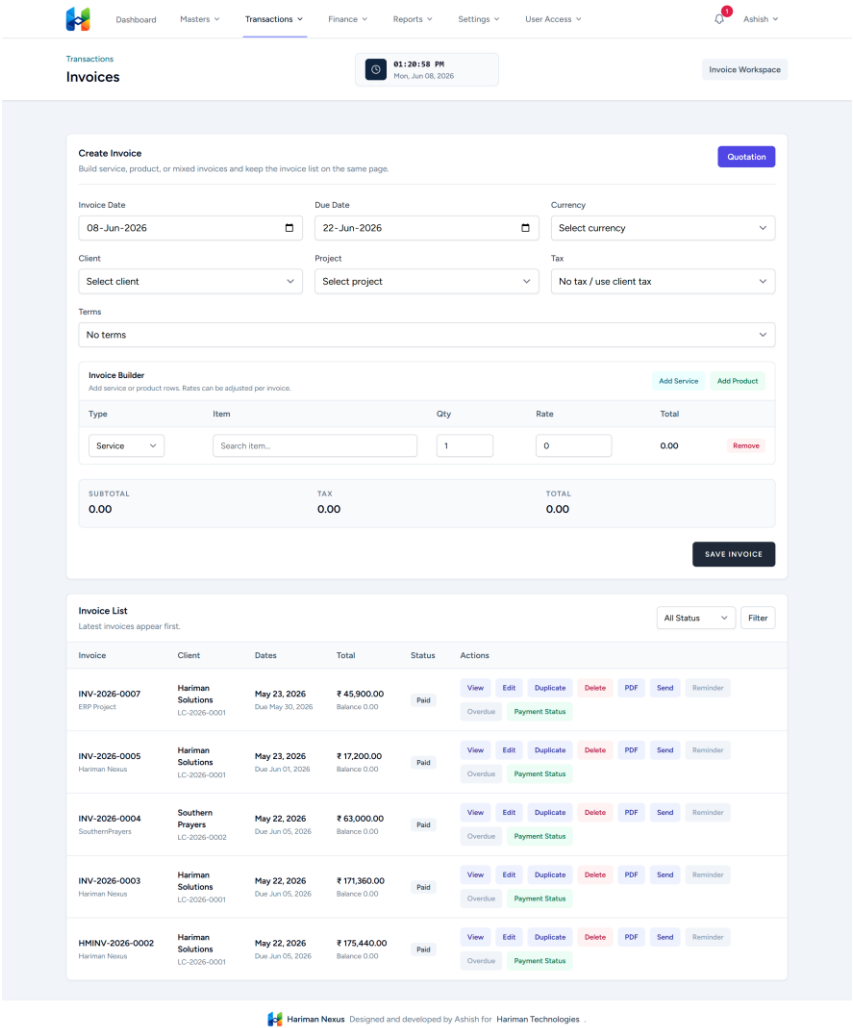


Figure: Invoice Follow-Up

Recommended steps

- 53. Use Send to email the invoice.
- 54. Use Reminder when the invoice is within the allowed reminder period.
- 55. Use Overdue when the invoice is past its due date.
- 56. Open Payment Status to record collections.
- 57. Review dashboard alerts for due and overdue invoices.

User checks

- Reminder and overdue emails use approved templates.
- Payment status is updated after receipt entry.
- Receipts are uploaded when available.

10. Payments

Payment Status is used to record collections, receipts, and balances against invoices.

DashboardMastersTransactionsFinanceReportsSettingsUser AccessAshish

TransactionsInvoices01:29:58 PMMon, Jun 08, 2026Invoice Workspace

Create InvoiceBuild service, product, or mixed invoices and keep the invoice list on the same page.Quotation

Invoice Date08-Jun-2026Due Date22-Jun-2026CurrencySelect currency

ClientSelect clientProjectSelect projectTaxNo tax / use client tax

TermsNo terms

Invoice BuilderAdd ServiceAdd Product

Add service or product rows. Rates can be adjusted per invoice.

Type	Item	Qty	Rate	Total
Service	Search item...	1	0	0.00

SUBTOTAL0.00TAX0.00TOTAL0.00

SAVE INVOICE

Invoice ListLatest invoices appear first.All StatusFilter

Invoice	Client	Dates	Total	Status	Actions
INV-2026-0007	Hariman Solutions	May 23, 2026	₹ 45,900.00	Paid	View Edit Duplicate Delete PDF Send Reminder
INV-2026-0005	Hariman Solutions	May 23, 2026	₹ 17,200.00	Paid	View Edit Duplicate Delete PDF Send Reminder
INV-2026-0004	Southern Prayers	May 23, 2026	₹ 63,000.00	Paid	View Edit Duplicate Delete PDF Send Reminder
INV-2026-0003	Hariman Solutions	May 22, 2026	₹ 171,360.00	Paid	View Edit Duplicate Delete PDF Send Reminder
HMINV-2026-0002	Hariman Solutions	May 22, 2026	₹ 175,440.00	Paid	View Edit Duplicate Delete PDF Send Reminder

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Figure 6: Invoice Payment Status

Module	What users do
Add Payments	Record received amount, payment date, method, reference, and optional receipt.
Partial Payments	Multiple entries can be recorded until the invoice is fully paid.
Receipts	Upload receipts or proof of payment for future reference.
Status Updates	Invoice status updates to paid, partially paid, or overdue based on balance and due date.
Delete Payment Entry	Removing a payment recalculates balance and status automatically.

10.1 Payment Entry Procedure

Payment entries should be recorded as soon as the business receives customer payment.

Dashboard

Masters

Transactions

Finance

Reports

Settings

User Access

01:29:58 PM
Mon, Jun 08, 2025

Ashish

Transactions

Invoices

Invoice Workspace

Create Invoice

Build service, product, or mixed invoices and keep the invoice list on the same page.

Quotation

Invoice Date

08-Jun-2026

Due Date

22-Jun-2026

Currency

Select currency

Client

Select client

Project

Select project

Tax

No tax / use client tax

Terms

No terms

Invoice Builder

Add service or product rows. Rates can be adjusted per invoice.

Add Service

Add Product

Type	Item	Qty	Rate	Total
Service	Search item...	1	0	0.00

Remove

SUBTOTAL

0.00

TAX

0.00

TOTAL

0.00

SAVE INVOICE

Invoice List

Latest invoices appear first.

All Status

Filter

Invoice	Client	Dates	Total	Status	Actions
INV-2026-0007	Hariman Solutions	May 23, 2026	₹ 45,900.00	Paid	View Edit Duplicate Delete PDF Send Reminder Overdue Payment Status
INV-2026-0005	Hariman Solutions	May 23, 2026	₹ 17,200.00	Paid	View Edit Duplicate Delete PDF Send Reminder Overdue Payment Status
INV-2026-0004	Southern Prayers	May 22, 2026	₹ 63,000.00	Paid	View Edit Duplicate Delete PDF Send Reminder Overdue Payment Status
INV-2026-0003	Hariman Solutions	May 22, 2026	₹ 171,360.00	Paid	View Edit Duplicate Delete PDF Send Reminder Overdue Payment Status
HMINV-2026-0002	Hariman Solutions	May 22, 2026	₹ 175,440.00	Paid	View Edit Duplicate Delete PDF Send Reminder Overdue Payment Status

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Figure: Payment Entry

Recommended steps

- 58. Open the invoice Payment Status page.
- 59. Enter payment date, amount, method, and reference.
- 60. Upload receipt proof if available.
- 61. Save the payment entry.
- 62. Confirm the remaining balance and invoice status.

User checks

- Partial payment amounts are accurate.
- Receipt files are attached for traceability.
- Deleting a payment is done only when correcting an error.

11. Finance and Expenses

Finance tools help the accounts team track outgoing payments and analyze business performance.

Module	What users do
Expense Categories	Classify expenses such as internet, travel, salaries, maintenance, and office costs.
Expenses	Record outgoing transactions with category, vendor, project, date, amount, tax, total, and status.
Receipt Uploads	Attach PDF, JPG, or PNG proof for expense records.
Payment Methods	Use cash, bank transfer, UPI, credit card, cheque, or online payment.
Profit and Loss	Compare paid revenue with expenses to understand profitability.
Cash Flow	Compare incoming invoice payments with outgoing expenses.
Project Profitability	Review project revenue, project expenses, and project profit.

11.1 Expense Recording

Expense recording gives the business visibility into outgoing transactions.

DashboardMastersTransactionsFinanceReportsSettingsUser Access

Finance

Expenses

01:22:36 PMMon, Jun 06, 2026

Expense Categories

Add Expense

Record outgoing transactions with categories, project links, tax, payment method, and status.

Expense Date

08-Jun-2026

Category

Select category

Project

No project

Vendor

No vendor / manual entry

Manual Vendor / Paid To

Used when no vendor is selected

Amount

0.00

Tax Amount

0.00

Payment Method

Select method

Receipt Upload

Choose File No file chosen

Status

Draft

Notes

Optional expense notes

Add Expense

Search

Expense no, vendor, notes

Category

All

Status

All

From

dd-----yyyy

To

dd-----yyyy

Filter

Reset

Expense List

Outgoing transactions ordered by latest expense date.

3 expenses

Expense	Date	Category	Vendor	Receipt	Total	Status	Actions
EXP-2026-0003	23 May 2026	Internet	ABC Suppliers VEN002 ERP Project	None	12,000.00	Draft	Edit Archive
EXP-2026-0002	23 May 2026	Internet	Airtel	View	1,180.00	Paid	Edit Archive
EXP-2026-0001	23 May 2026	Transport	Porter Hariman Nexus	None	2,000.00	Paid	Edit Archive

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Figure: Expense Entry

Recommended steps

- 63. Create or select the correct expense category.
- 64. Create an expense with date, category, vendor, project if applicable, amount, tax, and total.
- 65. Choose the payment method.
- 66. Upload receipt proof.
- 67. Use reports to analyze monthly and category spending.

User checks

- Every expense has a category.
- Vendor-linked expenses are assigned correctly.
- Receipt uploads are readable and relevant.

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Hariman Nexus User Guide

11.2 Financial Intelligence Reports

Finance reports support owners, directors, and accountants with business decisions.

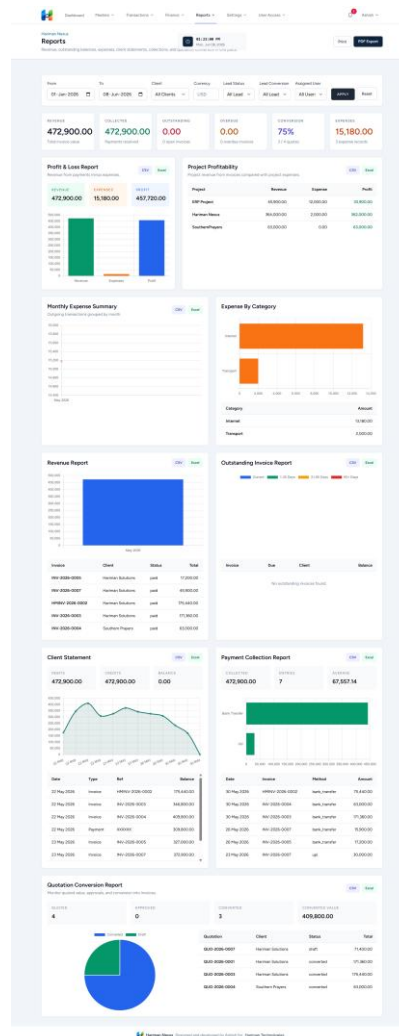


Figure: Finance Reports

Recommended steps

68. Open Reports and choose the financial report required.
69. Select the date range or filters.
70. Review revenue, expense, profit, and cash flow values.
71. Export PDF, CSV, or Excel when a report is needed for sharing.

User checks

- Date filters match the management period.
- Revenue is based on paid or recorded transactions as defined by the report.
- Project profitability is reviewed before major decisions.

12. Purchases, GRN and Inventory

The purchase, GRN, and inventory workflow separates physical receipt from vendor billing.

Important Business Rule
GRN is used for physical receipt of goods. Purchase is used for vendor billing, tax, cost, charges, and financial recording.

Inventory Workflow

Purchase
->

GRN
->

Stock Ledger
->

Inventory Reports

Dashboard

Masters

Transactions

Finance

Reports

Settings

User Access

Ashish

Transactions

GRN

01:21:42 PM

Mon, Jun 08, 2026

Goods Receipt Note

Create Direct GRN

Receive one or more products into one or many warehouses. Cost is picked from the mapped purchase or product master, not entered on GRN.

Add Product

Vendor

Select vendor

Default Warehouse

Select warehouse

GRN Date

08-Jun-2026

Reference

Product

Select product

Qty Received

1

Warehouse

Select warehouse

Remarks

Remarks

SAVE GRN

Search GRNs...

All Vendors

All Status

dd----yyyy

dd----yyyy

Filter

GRN

Vendor

Warehouse

Date

Items

Status

Actions

GRN-2026-0001

ABC Suppliers

MAINSTORE

04 Jun 2026

2

Posted

View

PDF

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Figure 7: GRN Product Warehouse Entry

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Hariman Nexus User Guide



DashboardMastersTransactionsFinanceReportsSettingsUser Access



1Ashish

TransactionsPurchases



01:21:19 PM
Mon, Jun 08, 2026

Purchase Workspace

Create Purchase

Load a posted GRN or enter purchase lines manually. Add tax and extra charges before printing.

Load GRN

Add Product

Vendor

Default Warehouse

Purchase Date

Reference

Select vendor

Select warehouse

08-Jun-2026

Product	Description	Qty	Warehouse	Unit	Cost	Tax
Product		1	Warehouse	Unit	0	0

Additional Charges

Remarks

0

SAVE PURCHASE

Search purchases...

All Vendors

All Status

dd-----yyyy

dd-----yyyy

Filter

Purchase	Vendor	Date	Items	Value	Status	Actions					
PUR-2026-0001	ABC Suppliers	04 Jun 2026	2	45,000.00	Draft	View	Edit	Post	PDF	GRN	Archive

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Figure 8: Purchase Loaded from GRN

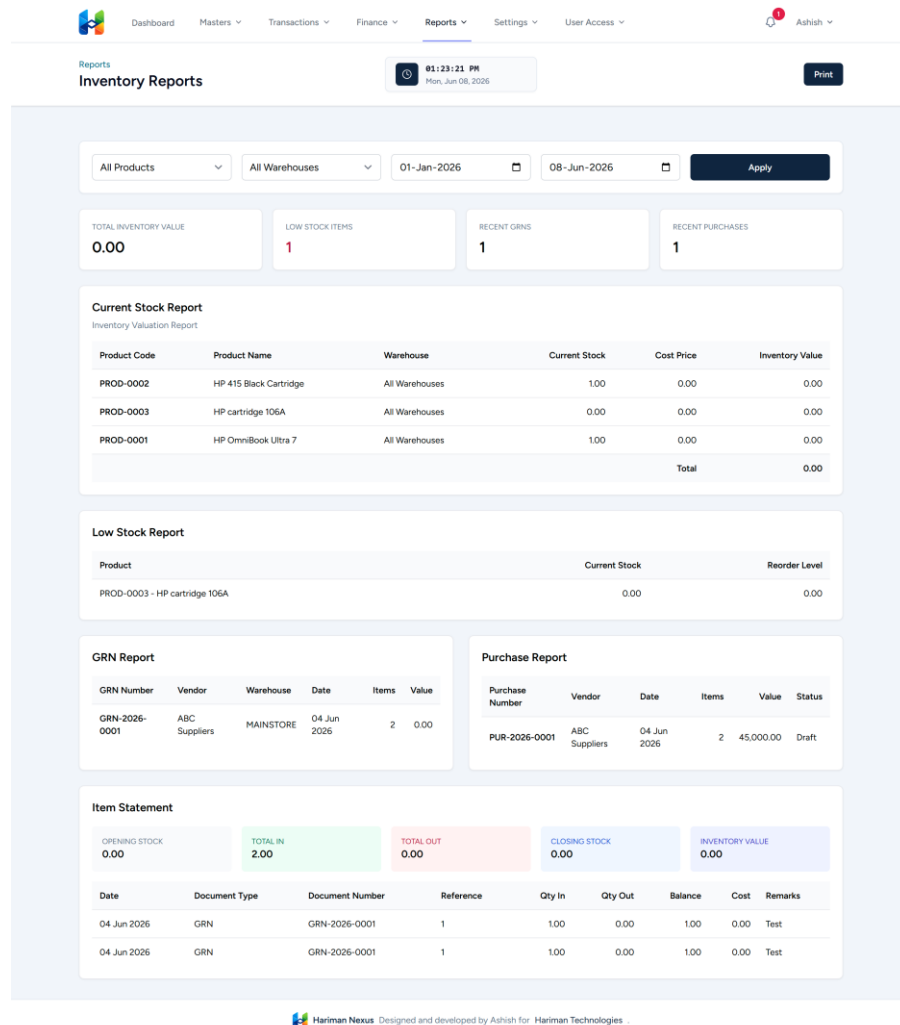


Figure 9: Inventory Reports

GRN usage

- Create GRN with one or more products.
- Select received quantity for each product.
- Select receiving warehouse per product line.
- Post GRN to increase stock and create stock ledger movement.

Purchase usage

- Open Purchases and choose Load GRN.
- Select a posted GRN from the popup list.
- Use the pencil action to load products, quantities, and warehouses.
- Add vendor costs, taxes, and additional charges.
- Print or export the purchase document with vendor details.

12.1 Creating and Posting a GRN

GRN is used by inventory or operations staff to record physical receipt of goods.

Dashboard

Masters

Transactions

Finance

Reports

Settings

User Access

1

Ashish

Transactions

GRN

01:21:42 PM

Mon, Jun 08, 2026

Goods Receipt Note

Create Direct GRN

Receive one or more products into one or many warehouses. Cost is picked from the mapped purchase or product master, not entered on GRN.

Add Product

Vendor

Default Warehouse

GRN Date

Reference

Select vendor

Select warehouse

08-Jun-2026

Product

Qty Received

Warehouse

Remarks

Select product

1

Select warehouse

Remarks

SAVE GRN

Search GRNs...

All Vendors

All Status

dd----yyyy

dd----yyyy

Filter

GRN	Vendor	Warehouse	Date	Items	Status	Actions
GRN-2026-0001	ABC Suppliers	MAINSTORE	04 Jun 2026	2	Posted	View PDF

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Figure: GRN Entry

Recommended steps

- 72. Open Transactions > GRN.
- 73. Select vendor and default warehouse.
- 74. Add one or more product lines.
- 75. Enter quantity received and line warehouse for each product.
- 76. Save as draft and review.
- 77. Post the GRN only after confirming the receipt.

User checks

- Every product line has a warehouse.
- Quantity matches physical receipt.
- Posted GRNs update stock ledger and current stock.

12.2 Loading GRN Into Purchase

The Purchase module uses posted GRN data to prepare the vendor billing record.

Dashboard

Masters

Transactions

Finance

Reports

Settings

User Access

1

Ashish

Transactions

Purchases

01:21:19 PM

Mon, Jun 08, 2026

Purchase Workspace

Create Purchase

Load a posted GRN or enter purchase lines manually. Add tax and extra charges before printing.

Load GRN

Add Product

Vendor

Default Warehouse

Purchase Date

Reference

Select vendor

Select warehouse

08-Jun-2026

Product	Description	Qty	Warehouse	Unit	Cost	Tax
Product		1	Warehouse	Unit	0	0

Additional Charges

Remarks

0

SAVE PURCHASE

Search purchases...

All Vendors

All Status

dd-----yyyy

dd-----yyyy

Filter

Purchase	Vendor	Date	Items	Value	Status	Actions					
PUR-2026-0001	ABC Suppliers	04 Jun 2026	2	45,000.00	Draft	View	Edit	Post	PDF	GRN	Archive

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Figure: Purchase Loaded from GRN

Recommended steps

- 78. Open Transactions > Purchases.
- 79. Select Load GRN to open the popup of posted GRNs.
- 80. Click the pencil icon beside the GRN to load it.
- 81. Review vendor, products, quantities, and warehouses.
- 82. Enter cost, tax, and additional charges.
- 83. Save and print the purchase document.

User checks

- Only posted GRNs are loaded into purchase.
- Purchase is used for cost and tax; GRN is used for receipt.
- Vendor details are reviewed before printing.

12.3 Inventory Reports and Item Statement

Inventory reports help management understand current stock, valuation, and item movement history.

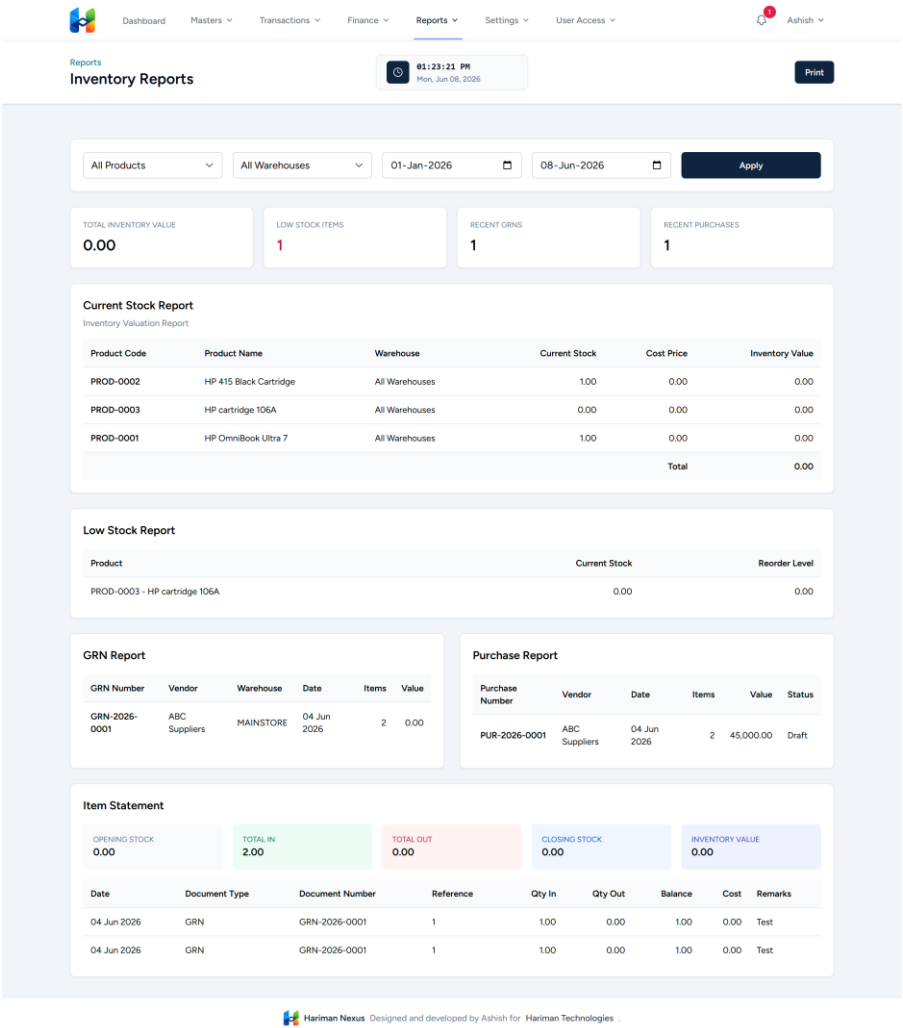


Figure: Inventory Report

Recommended steps

- 84. Open Reports > Inventory.
- 85. Use product, warehouse, and date filters.
- 86. Review current stock and low stock reports.
- 87. Review inventory valuation totals.
- 88. Open item statement for product movement history.

User checks

- Low stock items are reviewed for replenishment.
- Item statement shows opening balance, in, out, and closing stock.
- Valuation is used for internal review and stock visibility.

13. Reports

Reports convert day-to-day records into management information.

Module	What users do
Revenue Report	Review invoice income and billing totals.
Outstanding Invoice Report	Identify unpaid and partially paid invoices.
Client Statement	Review client-wise invoice and payment activity.
Payment Collection Report	Review collections by period and method.
Quotation Conversion Report	Measure quotation approval and conversion performance.
Expense Reports	Analyze monthly expenses, category totals, and trends.
Profit and Loss	Compare revenue and expenses.
Cash Flow Dashboard	Review cash in, cash out, and net flow.
Project Profitability	Compare project revenue and expenses.
Inventory Reports	Review stock, low stock, valuation, GRNs, purchases, and item statements.
Export Options Reports can be exported as PDF, CSV, Excel, or printed for management review.	

13.1 Reading Business Reports

Reports should be reviewed with the correct date range, filter, and business context.

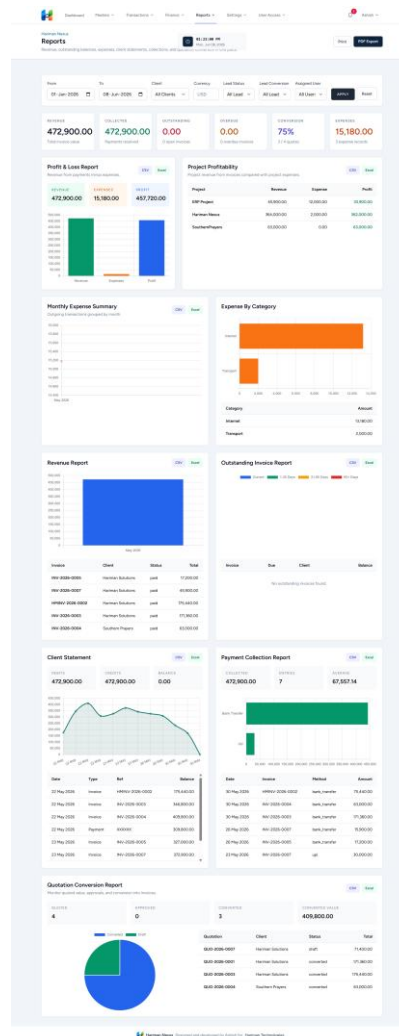


Figure: Reports Workspace

Recommended steps

89. Open the Reports menu.
90. Select the report required.
91. Apply date range and module filters.
92. Review KPI cards, summaries, charts, and tables.
93. Export or print when sharing outside the system.

User checks

- Filters are checked before making decisions.
- Outstanding invoices are followed up promptly.
- Inventory reports are reviewed before purchasing decisions.

14. Settings

Settings configure company information, document behavior, currencies, taxes, email templates, numbering, and module visibility.

Module	What users do
Company Setup	Maintain company name, logo, email, phone, address, website, tax registration, bank and payment details.
Currency Settings	Maintain currency list, symbols, exchange rates, and default currency.
Tax Settings	Create tax labels and rates; select a default tax if required.
Email Settings	Maintain SMTP settings and templates for invoice, reminder, overdue, and quotation emails.
Numbering Settings	Control prefixes and sequences for clients, quotations, invoices, leads, opportunities, and documents.
System Modules	View read-only module status for future licensing readiness.

14.1 Company and Document Settings

Company settings control how business documents appear and how users communicate with clients and vendors.

Settings

Dashboard Masters Transactions Finance Reports Settings User Access Ashish

81:24:56 PM Mon, Jun 06, 2026

Business Identity

Company setup updated successfully.

Company Profile
Manage the information that appears on quotations, invoices, and business documents.

IDENTITY

Company Name: Hariman Solutions

Company Email: info@hariman.co.in

Website: https://www.hariman.co.in

Tax Registration Number: xxxxxxxxxxxx

PHONE & LOCATION

Phone Country: India (+91)

Phone Code: +91

Phone Number: 8233990399

Company Location: India (IN)

Company Address: Sardarpura ,Jodhpur-342003, Rajasthan, India

BRANDING & PAYMENT

Company Logo: Choose File No file chosen

Payment QR: Choose File No file chosen

Payment Label: Bank Details

Payment Reference:

Bank Details: ICICI Bank, Ashish, XXXXXXXXXX, ICICXXXXXXXXXX

When bank details are filled, invoice templates can use them before QR payment instructions.

SAVE COMPANY SETUP

Document Preview

Hariman Solutions
info@hariman.co.in
+91 8233990399
India
Sardarpura ,Jodhpur-342003, Rajasthan, India
https://www.hariman.co.in

Payment Display

Bank Details
ICICI Bank
Ashish
XXXXXXXXXX
ICICXXXXXXXXXX

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Figure: Company Settings

Recommended steps

94. Open Settings > Company Setup.
95. Upload company logo and enter company address.
96. Maintain email, phone, website, tax registration, bank, and payment details.
97. Open Currency, Tax, Email, and Numbering settings as required.

User checks

- Company logo appears on documents.
- Email templates contain correct business language.
- Numbering settings match company document policy.

14.2 System Modules

System Modules is a read-only page used to see which application modules are enabled.

System Modules
Read-only module status foundation for future Hariman Nexus licensing.

License Information
License Management Not Yet Implemented

CURRENT LICENSE KEY	LICENSE STATUS	EXPIRY DATE	LICENSED MODULES
License Management Not Yet Implemented	License Management Not Yet Implemented	License Management Not Yet Implemented	License Management Not Yet Implemented

Module Status
Module status is controlled only by database updates, future Hariman License Manager, or developer access.

Module Code	Module Name	Description	Status	Updated Date
CLIENTS	Client Management	Client records used across quotations, invoices, and future ERP workflows.	Enabled	04 Jun 2026, 02:28 PM
CRM	CRM Management	Leads, follow-ups, opportunities, activities, and CRM conversion workflows.	Disabled	04 Jun 2026, 02:28 PM
EXPENSES	Expense Management	Expense categories, outgoing transactions, receipts, and expense reporting.	Enabled	04 Jun 2026, 02:28 PM
GRN	GRN Management	Future goods receipt note workflow foundation.	Enabled	04 Jun 2026, 02:28 PM
INVENTORY	Inventory Management	Future stock, item movement, and warehouse workflow foundation.	Enabled	04 Jun 2026, 02:28 PM
INVOICES	Invoice Management	Invoice creation, PDFs, sending, due dates, and billing status.	Enabled	04 Jun 2026, 02:28 PM
PAYMENTS	Payment Management	Invoice payment entries, receipts, partial payments, and reminders.	Enabled	04 Jun 2026, 02:28 PM
PRODUCTS	Product Management	Product catalog for quotation and invoice line items.	Enabled	04 Jun 2026, 02:28 PM
PROJECTS	Project Management	Project records used for client, quotation, invoice, and profitability tracking.	Enabled	04 Jun 2026, 02:28 PM
PURCHASES	Purchase Management	Future purchase order and procurement workflow foundation.	Enabled	04 Jun 2026, 02:28 PM
QUOTATIONS	Quotation Management	Quotation creation, approvals, PDFs, sending, and conversion workflows.	Enabled	04 Jun 2026, 02:28 PM
REPORTS	Reporting Management	Financial, operational, CRM, and exportable business reports.	Enabled	04 Jun 2026, 02:28 PM
SERVICES	Service Management	Service catalog and default service rates.	Enabled	04 Jun 2026, 02:28 PM
VENDORS	Vendor Management	Vendor records for expenses and future procurement workflows.	Enabled	04 Jun 2026, 02:28 PM

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Figure: System Modules

Recommended steps

98. Open Settings > System Modules as Super Admin.
99. Review module codes, names, descriptions, and status.
100. Use module status to understand menu visibility.
101. Do not expect enable or disable buttons in the application.

User checks

- Disabled modules are hidden from menus.
- Direct access to disabled modules is blocked.
- Module control is prepared for future licensing management.

15. Roles and Permissions

Role-based access protects data and ensures users only perform actions suitable for their responsibilities.

Role	Business Responsibility
Super Admin	Full access, user management, settings, reports, and module visibility review.
Admin	Operational administration, user registration/activation, records, transactions, and reports.
Accountant	Invoices, payments, expenses, finance reports, and view-only operational references.
Operations Staff	Clients, projects, CRM, quotations, products, services, GRN, purchases, and operational work.
Viewer	Read-only access for monitoring records and reports without changing data.

15.1 User Administration

User access should be reviewed periodically to keep business data secure.

Create User
Register a team member and assign their Hariman Nexus access role.

Name Email

Role Password

Confirm Password

CREATE USER

Registered Users
Review user access, status, and available account actions.

User	Role	Status	Created	Action
Aditi aditi@hariman.com	Super Admin	Active	22 May 2026	Edit Deactivate Delete
Ashish ashu@hariman.com	Admin	Active	21 May 2026	Edit Deactivate Delete
Ashish ashish@hariman.com	Super Admin	Active	21 May 2026	Edit Deactivate Delete

Hariman Nexus Designed and developed by Ashish for Hariman Technologies .

Figure: User Access

Recommended steps

102. Open User Access.
103. Register a new user only when authorized.
104. Assign the correct role based on business responsibility.
105. Deactivate users who no longer require access.
106. Review whether permissions match the user role.

User checks

- Super Admin access is limited to trusted users.
- Viewer users cannot change records.
- Inactive users cannot log in.

16. Audit Logs and Security

Audit logs provide the security history of what happened, who performed the action, and when.

- Login tracking records successful access.
- Create, update, archive, and status changes are recorded.
- Payment changes are recorded to protect financial accountability.
- Module access attempts help identify restricted or disabled module activity.
- Audit history supports governance, internal review, and ERP-style control.

Audit Logs vs. CRM Timeline

Audit logs are for system security and accountability. CRM timelines are for business history and customer journey tracking.

16.1 Audit Review Practice

Audit logs should be used during operational review, financial review, and issue investigation.

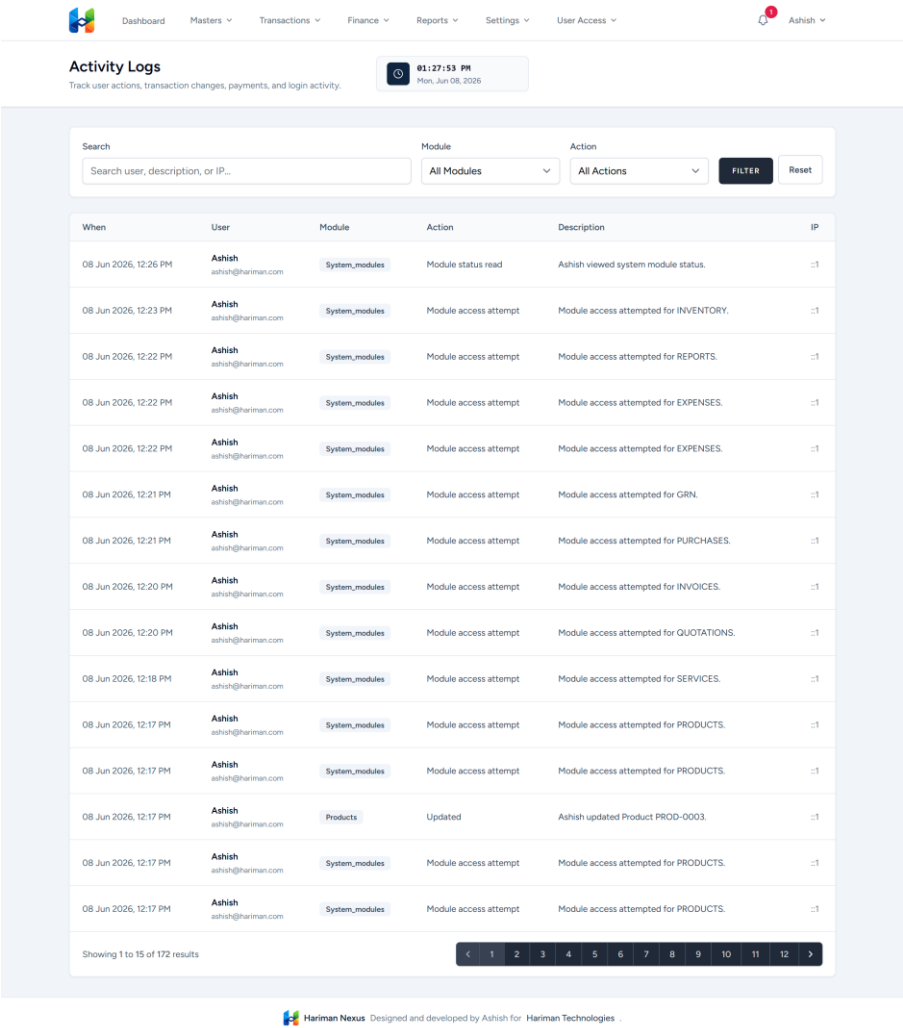


Figure: Audit Logs

Recommended steps

- 107. Open User Access > Activity Logs.
- 108. Filter or review recent activity.
- 109. Check user, module, action, description, and time.
- 110. Use logs to investigate unexpected changes.

User checks

- Payment and archive actions are reviewed carefully.
- Module access attempts are checked when access issues are reported.
- Audit logs are not deleted during normal business use.

17. Notifications

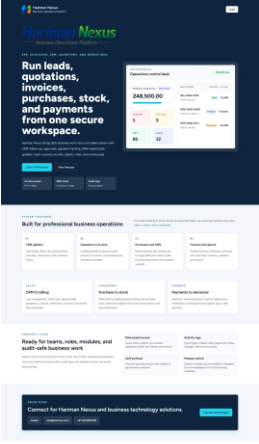
Notifications help users act on time-sensitive work without searching across modules.

- The notification bell shows active alerts.
- Invoice due alerts highlight upcoming collections.
- Overdue alerts help accounts follow up after due dates.
- CRM follow-up alerts show missed or overdue sales activities.
- The notification area is designed for future expansion into broader in-app alerts.

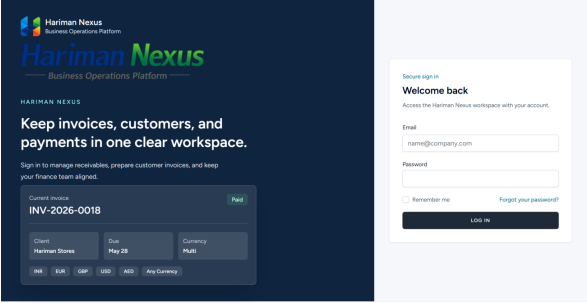
Application Screenshot Reference

This reference gallery includes the current Hariman Nexus screens supplied for this user guide. These visuals can be used during training, client walkthroughs, and PDF review.

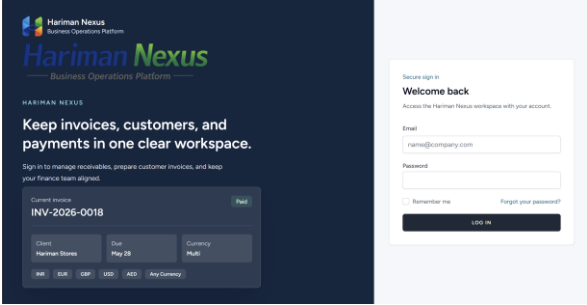
Public Landing Page

The Public Landing Page features a dark blue header with the Hariman Nexus logo. The main content area is white with a large heading 'Run leads, quotations, invoices, stock, and payments from one secure workspace.' Below this, there are several sections: 'Built for professional business operations' with a list of features, 'Ready for loans, rates, modules, and audit-safe business work', and a 'Get started' button.

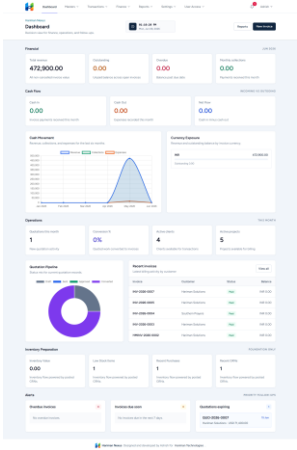
Login Page

The Login Page has a dark blue header with the Hariman Nexus logo. The main content area is white with a heading 'Keep invoices, customers, and payments in one clear workspace.' Below this, there is a 'Sign in' button and a 'Current Invoice' section showing 'INV-2026-0018'. To the right, there is a 'Secure sign in' section with a 'Welcome back' message, an email field, a password field, and a 'Log in' button.

Login Workspace

The Login Workspace screenshot shows the same login form as the Login Page, but with the 'Current Invoice' section expanded to show details for 'INV-2026-0018', including the client 'Hariman Nexus', the due date 'May 28', and the currency 'USD'.

Dashboard

The Dashboard screenshot shows a comprehensive overview of the business operations. It includes a 'Financial' section with a balance of 472,900.00, a 'Sales' section with a total of 0.00, and a 'Marketing' section with a total of 0.00. There are also several charts and tables providing detailed insights into the business performance.

CRM Leads

CRM Follow-Ups

CRM Opportunities

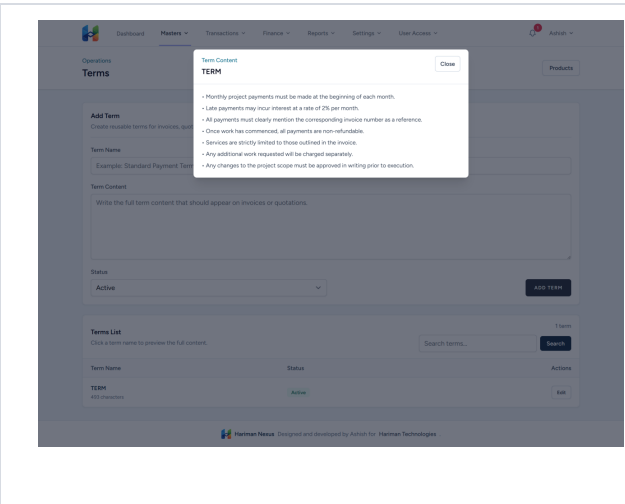
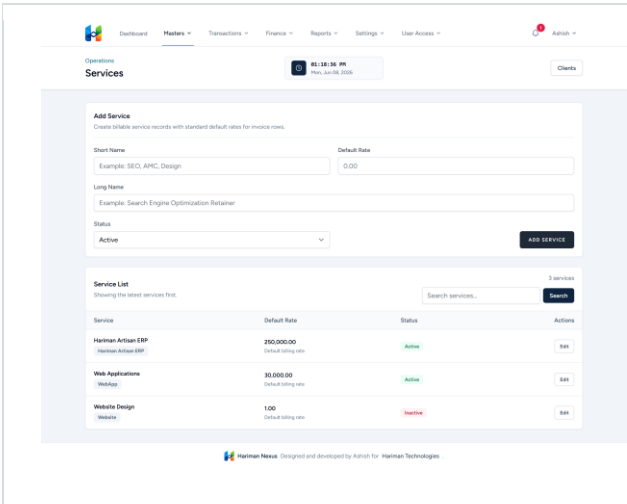
Clients

Projects

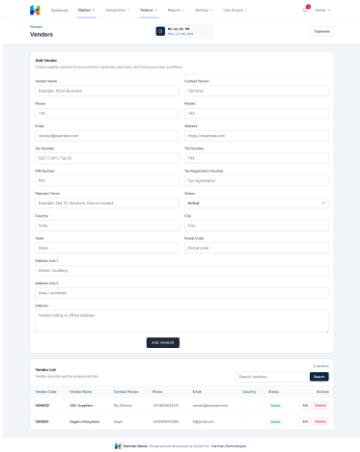
Products

Services

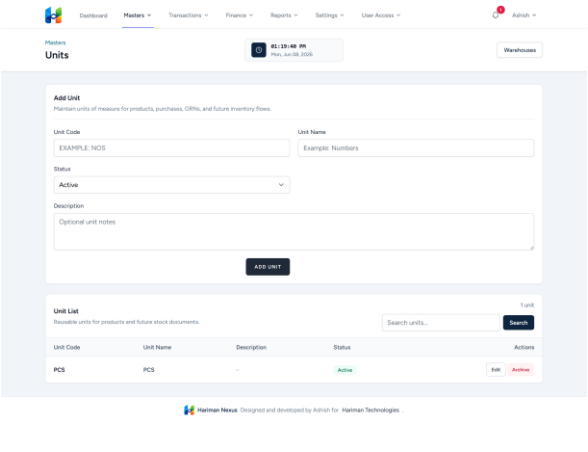
Terms



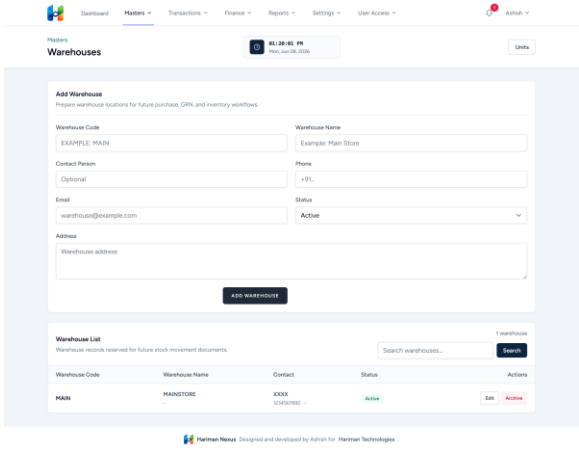
Vendors



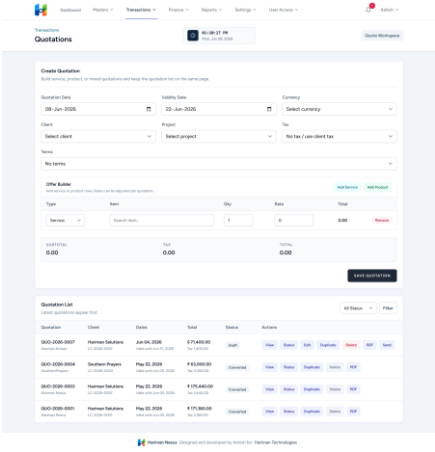
Units



Warehouses

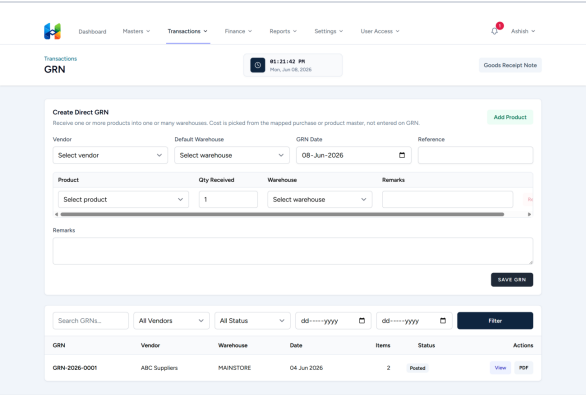
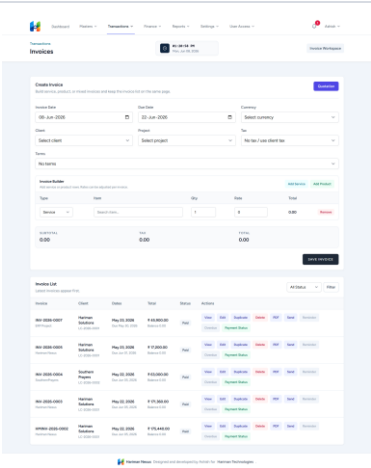


Quotations

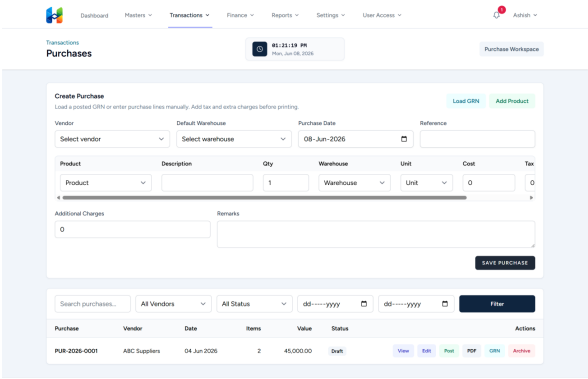


Invoices

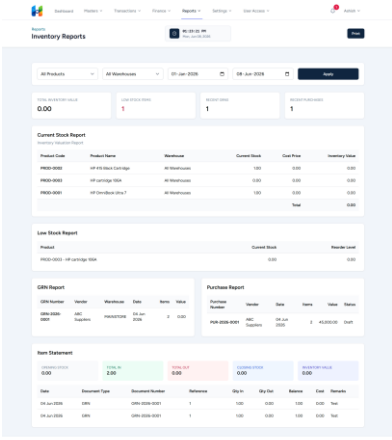
GRN



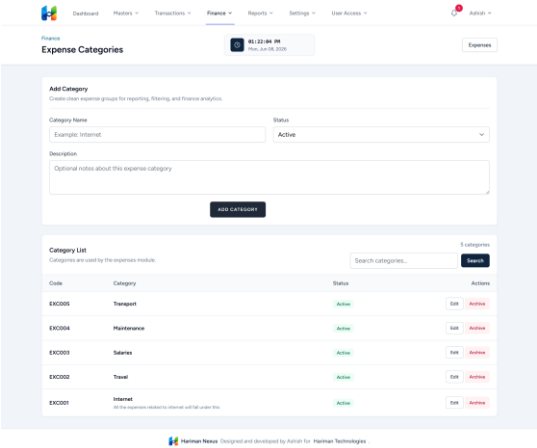
Purchases



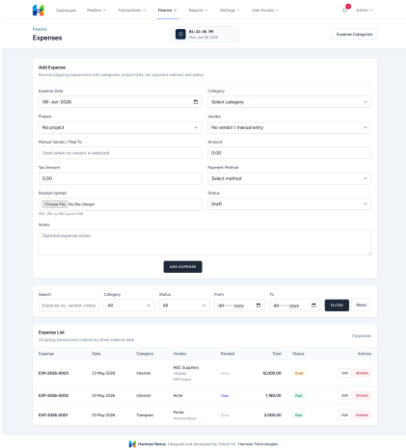
Inventory Reports



Expense Categories

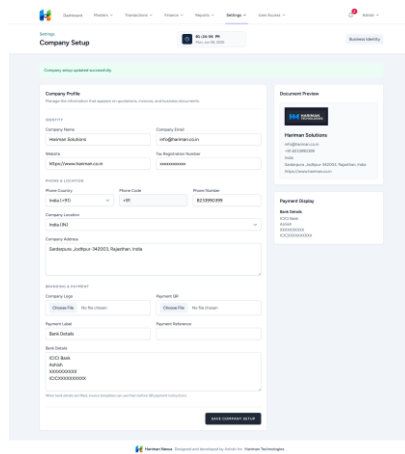


Expenses

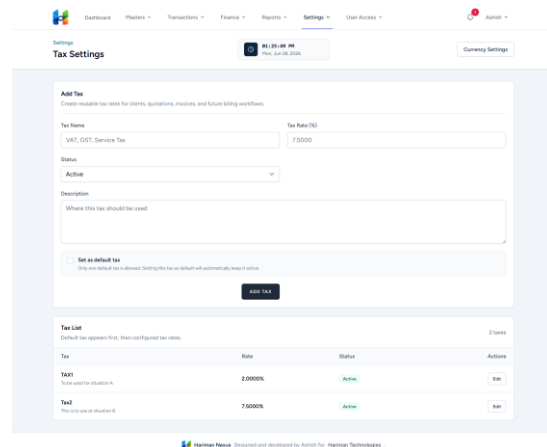


Reports

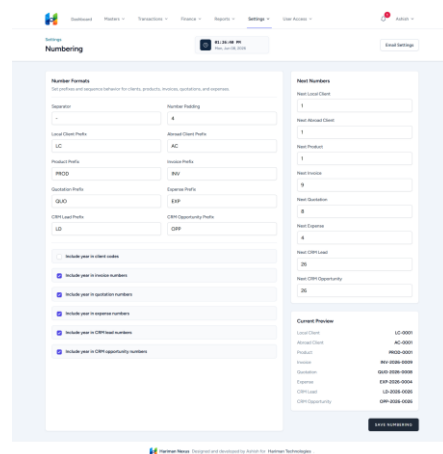
Company Setup



Tax Settings



Numbering



User Access

- [Dashboard](#)
- [Masters](#)
- [Transactions](#)
- [Finance](#)
- [Reports](#)
- [Settings](#)
- [User Access](#)

Admin

User Access

\$1,217.33 PM
 Mon, Jun 08, 2020

Create User

Register a team member and assign their Hartman Nexus access role.

Name	Email
Role	Password
Viewer ▼	
Confirm Password	

CREATE USER

Registered Users

Monitor user activity, status, and available account actions.

User	Role	Status	Created	Action
AARIS aaris@hartmann.com	Super Admin	Active	22 May 2020	Edit Deactivate Delete
Austin austin@hartmann.com	Admin	Active	21 May 2020	Edit Deactivate Delete
Ashish ashish@hartmann.com	Super Admin	Active	21 May 2020	Edit Deactivate Delete

Designed and developed by Ashish for Hartman Technologies

Hariman Nexus | Designed and developed for Hariman Technologies

Hariman Nexus User Guide

18. Common Workflows

These workflows summarize practical day-to-day usage.

Workflow 1: Client to Payment

Create Client ->	Create Project ->	Create Quotation ->	Approve ->	Convert To Invoice ->	Receive Payment
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Workflow 2: Lead to Client

Create Lead ->	Add Follow-Up ->	Create Opportunity ->	Mark Won ->	Convert To Client
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Workflow 3: Product to Inventory

Create Product ->	Create GRN ->	Post GRN ->	Review Inventory Report
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Workflow 4: Expense Control

Create Expense Category ->	Create Expense ->	Upload Receipt ->	Review Expense Report
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Workflow 5: GRN to Purchase

Create GRN ->	Load GRN Into Purchase ->	Apply Charges ->	Apply Taxes ->	Print Purchase
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19. Best Practices

Use these practices to keep Hariman Nexus clean, reliable, and useful for management decisions.

- Maintain clean master data before creating transactions.
- Avoid editing approved quotations unless the business process allows a controlled revision.
- Use inactive status instead of deleting master records.
- Upload receipts for payments and expenses.
- Review audit logs regularly for accountability.
- Keep company settings, currency, tax, and numbering updated.
- Use reports before business decisions instead of relying on manual summaries.
- Post GRNs only after physically verifying received goods and warehouse location.

20. Troubleshooting / FAQ

This section answers common business-user questions.

Question	Answer
Why can I not edit an approved quotation?	Approved quotations are locked to protect accepted commercial terms.
Why does GRN not ask for cost?	GRN records physical receipt. Cost, tax, and charges belong to purchase/vendor billing.
Why does Purchase load GRN?	Purchase can use posted GRN data so vendor billing matches received goods and warehouses.
Why can I not see a module?	The module may be disabled or your role may not have permission.
Why can I not access a page?	Your role may not allow that action, or the module may be disabled.
Why does an invoice show overdue?	The due date has passed and the invoice still has an outstanding balance.
Why is registration protected?	Only authorized logged-in users should create application users and assign access roles.

21. Closing Page

Hariman Nexus

Business Operations Platform

Thank You

Hariman Nexus helps businesses manage CRM, sales, finance, inventory, operations, reporting, and business growth from one connected platform.

Contact	Details
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Mobile	+91 8233990399