#####  Script of Financial Module

Welcome to our presentation on PanapnaTech Business Software's financial module.

### **Add an Expenses**

Creating a new expense is straightforward. First, go to the "Financial" section, and navigate to "Expenses," in the top navbar to initiate a new one. Click on ' Record Expense' and you can generate an expense for an existing client.

 The "Files" section is a centralized repository for all project-related documents, ensuring easy access and collaboration.

Users can upload, share, and organize files within the project. This feature simplifies document management, encourages version control, and enhances collaboration among team members.

 - Name

 -Note

 - Expense category

 - Expense date

 - Amount

 - Select customer; relevant details auto-populate.

 - Choose the currency setting.

 - Tax

 - Choose from various options: Bank, PayPal.

 - Reference

 - Repeat every

 - Click on the save button.

 - Options include expenses, child expenses, tasks, marking expenses, and managing reminders.

We can edit, copy, print, and delete expenses.

###  **Add an Invoice**

Creating a new invoice is straightforward. First, go to the "Financial" section, and navigate to "Invoice," in the top navbar to initiate a new one. Click on ' Create New Invoice' and you can generate an invoice for an existing client.

 - Select customer; relevant details auto-populate.

 - Add information such as invoice numbers, creation, and due dates

 - Choose from various options: Bank, PayPal.

 - Choose the currency setting.

 - admin note

 For further customization, utilize the "Add Custom Item" button. This allows you to include personalized items by specifying the item name, quantity, material, labor, and other cost values. This feature provides a comprehensive approach to meeting specific project needs.

 - Save as draft or finalize.

- 'View as Client' feature for preview.

 - Options include invoices, tasks, activity logs, marking invoices, and managing reminders and notes.

-Tracking: The module enables users to track the status of invoices, including whether they've been sent, viewed, paid, or are overdue. This helps businesses stay organized and follow up on outstanding payments.

- Allows clients to access statements, review payment statuses, and generate statements for their records.

 - In addition to reinforcing your brand identity through the inclusion of your logo and branding details on the invoice, the module also offers the capability to save the invoice in PDF format.

 -In conclusion, the PanapnaTech Invoice section is the ideal fit for your business, offering a comprehensive and customization solution for efficient invoicing.

Check the Payment

To check payments, is straightforward. First, go to the "Financial" and select "Payments".

We can view and, delete all "payments" on the dashboard.