	Kladana	Comments on how it works in Kladana
For Manufacturing		
Production Orders	☐	Create PO on the basis of BOM, mark stages as 'completed', monitor manufacturing progress.
BOM Costing	☑	Print document with estimated cost of Finished products (according to BOM). FIFO only.
Process Routing	☑	Assign different Raw materials to different production stages and control their usage along the process. Start to produce even if you are still awaiting Raw materials for the last stages.
Time tracking (start/end timestamp for PO, every stage inside PO)	☑	Monitor "Start - Finish" dates for entire PO or for any stage of the PO. Change dates manually if you record them on the basis of received paper/mail reports.
Outsourcing / Sub-Contract	☐	In Kladana is expected in **summer 2023**.
Supply, reservation of raw materials for specific PO	☑	**Analyze missing Raw materials** and create in 1 click linked Purchase Order to buy them or a Production Order to produce them.
"Plan - fact" report	☐	In Kladana is expected in **May 2023.** Track **estimated** quantity/cost of Finished products and Raw materials and compare with **actual** quantity/cost (for PO).
Partial manufacturing	☑	Issue Finished goods in several batches for 1 Production Order (e.g. what was produced for a day or week). You can **define batches before starting** (already in Kladana) **or after starting (est date April 2023)**
Line Rejection (Changes in Production Order)	☑	Change Finished goods and Raw materials **before** or **after** starting the production process.
Make-to-Order	☑	Create Production order **on the basis of Sales Order.** Also you can **see all linked documents** as a chain: Sales Order - Production Order - Purchase Order (Raw materials) - Receiving (Raw materials) - Shipment (Finished goods). Invoices and Payments made/received can be linked too. For manufacturing processes, including **Subcontractors**, all transactions between your company and Subcontractor company may be linked too.
Scrap Counting	☑	Add **more than 1 Finished product** to a BOM or directly to a specific Production Order (for example wood boards and saw dust). You can choose if **Cost of Scrap** should calculated or not.
List of completed Job Orders (operations)	☑	Monitor list of completed Job Orders (operations) for all PO with significant details. **Filter list** by PO number, name of person who completed operation, used BOM, name of Finished goods, etc.
Assign Job Order to someone from "Employees" list	☐	In Kladana is expected in **April 2023**. Monitor who exactly completed Operation (person or entity) and calculate **cost of job** based on the "rate for 1 item procesed".
Finished Goods Testing	☑	Create operation = **"testing"** or **"quality control"** as one of the stages in Routing.
Barcodes for Finished products (EAN13, etc)	☑	Generate or add manually barcodes for Products. Also you can use .xls import to upload them in bulk. Print barcodes in documents and stickers.
Batch numbers for Finished products	☑	Create and assign Batch numbers to Finished products, monitor Stock level for every batch. Choose batch for products in Shipment.
Barcodes for Batches	☑	Generate them or add manually. Print Batch barcodes in documents and stickers.
Labels editor (to stick on Finished products)	☐	In Kladana is expected in **May 2023**. Available for all plans. Design **your custom sticker** using information from your account in Kladana and print it by thermal printer. Custom sticker may contain such data as: Product title, description, MRR, manuf. date, barcode, batch number, batch barcode, special symbols, etc.
WIP tracking	☑	Monitor **WIP** volume for **each PO.** Also WIP is **tracked in Stock report** as 'In Transit', so you can monitor level both for already produced stock (On Hand) along with goods which is still in production (In Transit).
Accurate Stock/Stock movement tracking	☑	**Track stock level** for all Warehouses separately, including your stock at Subcontractor warehouse or Raw materials / Finished products warehouses.
Cost calculation (FIFO)	☑	Cost calculation is based on the **cost of raw materials** + manually added **operation costs.**
For Inventory and Warehouse management		
Product and Service cards, groups	☑	
Basic item fields: country, tax rate, HSN/SAC, different UOMs	☑	
Weight and Volume for Item	☑	Weight and Volune fields are used to calculate total weight/volume for goods in transaction.

	Kladana	Comments on how it works in Kladana
Different Prices for Item	☑	After defining different prices use them in Orders or assign price level to a specific Customer.
Price editor/calculator	☑	**Change prices in bulk** for Products and Services using formulas. You can update Prices in Item cards or calculate them for a specific transaction. Choose **all products** or **specific group**. Also you can choose **all items in Purchase Order** for example and change/setup prices only for them not only in transaction, but update prices in Item cards too.
Different currencies	☑	Use different currencies for the Product, choose in Transaction which currency to use. Currency rates autocalculation.
Bundles, Packages, Variants	☑	**Bundles**: allow to sell as a bundle current Products (and use their Stock level to understand if quantity of bundle components is suffucient or not). Special price for Bundle can be defined. **Packages**: allow to buy/sell in boxes (rolls, kilos) and then count them in inventory and sell/buy in pcs (meters, gramms). **Variants**: allow to create Product modifications for different sizes, colours, etc.
Flexible Reorder Point (Min Stock level) setup with notifications	☑	Setup Minimal Stock level for Product, **track it** in Reports, **receive notifications** when Stock level falls below Reorder point. Can **be defined separately** for Variants and Warehouses.
Barcode generation, scanning	☑	Generate, fill manually, upload by .xls import. Scan them to add Item to transaction (Receiving, Shipment, Transfer, Inventory count). Print Barcode numbers in documents or stickers.
Labels with barcodes: printing and creation own design	☑	In Kladana is expected in **May 2023**. Available for all plans. You can design **your custom sticker** using information from your account in Kladana and print it using your thermal printer, e.g. Name, MRR, manuf. date, Product barcode, Batch number, Batch barcode, description, special symbols, etc.
Batch/ expiry dates tracking	☑	Create Batch numbers and barcodes, assign Batch to Products, track Stock level for each batch, choose batch for Shipments. Assign Batch number to Finished products after PO is completed.
Serial Numbers tracking	☑	
Upload / download Items in bulk (.xls import/export)	☑	Also 1. Import can be used to update Item information (e.g. new field or prices), 2. Export can be used to download to another system.
Multiple Warehouses	☑	Use different locations for Raw materials and Finished goods in specific PO. Produce at the external Warehouse like "Subcontractor _1_ Warehouse". Use different Warehouses to track Stock in your showrooms, retail points, etc.
Warehouse Bin Locations / Picklists	☑	Organize your Storage space, assign Bins to Products, place Bins into Locations inside Warehouse to find them easily. Print Picklists to **find items quickly** while preparing Order for Shipment.
Inventory operations (Add/Reduce stock, Warehouse Transfers)	☑	That helps to record all transactions accurately and keep Stock counting clear. For item lines in Stock Adjustments and Write-offs **reason** can be specified.
Inventory counting, resolving of discrepancies	☑	Barcode scanning can be used to conduct Inventory count.
Stock & Stock movement reports	☑	
Filters, sorting in Reports. Details for chosen items/counterparties	☑	Reports are **flexible** and powerful: - track Stock level for any moment in the past, track Stock Movement for custom period, - track Stock level by Warehouse/Item Group/Batch, etc., - **dive into** line in Report to see details (e.g. log of transactions), - filter Reports and save filtered results as **bookmarks for quick access.**
Inventory History	☑	
Negative stock restriction	☑	In Kladana you can **deny** to create transactions that decrease 'On Hand' stock level below 0. That helps to account inventory stock correctly.
For Sales & Purchasing		
Sales/Purchase transactions and Print forms (Documents)	☑	
GST calculation, invoicing	☑	Calculate GST in Sales/Purchase transactions, print SQ, RfQ, Tax Invoices and other documents.
E-invoices, E-way bills	☐	
Upload / download bulky Orders via .xls import	☑	
Discounts master	☑	Setup different Discounts for your particular Customers or Products: Special price, Personal or Accumulative discount, Roundoff cents.
Overhead Expenses counting	☑	The sum, marked as overhead expenses in Receiving/Shipment, is distributed for products cost.
Purchase on the basis of the Sales Order or Sales history	☑	
Sales (Profit) report with filters/sorting	☑	Chose sales period and monitor total Sales volume, Profit, Margin, Returns. Use filters to specify report results, e.g. for specific Product group or Customer. Analyze your Sales by Products, Customers or Employees (Sales managers).

	Kladana	Comments on how it works in Kladana
Counterparties and CRM		
Counterparty card: basic details	☑	
Counterparty tags	☑	Tag Customers and use tags in Reports or filter them by Tags (e.g. 'Enterprises').
Conuterparty card: extended data	☑	Place **notes** and **attachments** in Counterparty card. Monitor **log of transaction** with Counterparty, **essential numbers** e.g. № of Orders, average transaction, etc. Download Settlement of accounts.
Counterparty's .xls import/export	☑	
Price level for Counterparty	☑	Assign special Price level for Counterparty, it will be substituted in item line while Order creation.
Counterparty list with segmentation	☑	**Segment** list of your Customers and Suppliers using such filters as Period, Total Sales, number of Sales, Average Sale volume, etc.
Contracts	☑	Maintain list of Contracts. Assign specific Orders to the Contracts to monitor progress.
Sales Funnel	☑	In Kladana you can create Statuses for Sales Order and monitor Sales Funnel based on these Statuses, e.g. number/total sum of Orders in Status for the current moment or moment in the past.
Tasks	☑	Create Tasks manually or they can be created as a result of Workflow. Responsible person will receive notification on the Due date of the Task or when Task was created.
For Financials counting		
Incoming and Outgoing Payments	☑	Create payment records independently or as 'add related' to Orders/Invoices.
Financial Adjustments	☑	
Debit/Credit Report	☑	
Statement of Accounts with Counterparties (Counterparty Ledger)	☑	
Cash Flow Report	☑	
PnL Report	☑	
Automation, Customization, Control		
Branches	☑	Use different 'Own Companies' if you are operating on behalf of different legal entities or have different GSTINs
Automated Workflows	☑	Automate routine operations, receive custom Reminders or create Tasks.
User Access Rights	☑	Assign roles & access to different users of various features within the software. For example, to prohibit users view Stock or Profit reports or limit their access to a specific warehouse.
Notifications	☑	Receive notifications when Invoice is not paid or Sales Order is not shipped on time, Stock level is decreased below Reorder point. Also some custom notifications cen be generated by Workflows.
Custom Fields	☑	In Kladana Custom Fields are available for **all types of Transactions, Production Orders, Items, Counterparties**. For example, create Custom field 'Delivery partner' (type: Dataset) and add it as required to the Shipment transaction. Or field 'Packing type' (type: text) to specify how exactly Shipment should be packed.
Custom Print forms	☑	Create Custom printable document form based on the data in your Kladana account. Also Support team can create Custom print form for free for paid plans.
Custom Statuses for all transactions	☑	By using Statuses you can track the life cycle of your transactions. For example, Sales Orders can pass through the statuses «Accepted», «Paid», «Shipped».
"Send by Email" for documents	☑	Send documents to your Customer or Supplier directly from Kladana as .pdf, .xls or as link.
Autoreports (lists) to email	☑	
Attach Files to transactions/tasks	☑	
Custom lists (Datasets)	☑	Create Custom lists e.g. "Sales agents", "Delivery partners" and use them in Custom fields.
Custom views for Transactions and Reports	☑	Choose what columns you want to see. After view is adjusted it will be **autosaved** for the user for the list/report.
Powerful filters in reports, Bookmarks	☑	
Custom numbering for SKU and Transactions	☑	Setup your own prefix. If you use different Branches (your Own Companies) numeration **can be independent** for each of them.
Edit, archive, delete in bulk: Items, Counterparties, Transactions, etc.	☑	
Audit Logs	☑	Monitor the log of all actions made in Kladana account by any of users: create, delete, edit, etc.

	Kladana	Comments on how it works in Kladana
Integrations/ Add-ons / API		
API	☐	Expected in **May 2023** (Kladana already has very powerful API, now we are preparing documentation), available from Professional plan.
Tally connector	☐	Without date, paid connector.
Shopify connector	☐	Expected in **summer 2023,** paid connector.
Amazon/Flipkart connectors	☐	Without date, paid connectors.
B2B Online Order	☑	Expected in **April 2023** (free till end september 2023), can be used for field sales representatives or to receive orders from your customers (like basic online store).