

EXECUTIVE DASHBOARD

Commodity Trading Intelligence, Simplified Anywhere.

The Executive Dashboard is a custom Odoo module designed to streamline operations for commodity trading businesses. By converting complex enterprise workflows into a mobile-first, intuitively structured interface, it gives traders, managers, and logistics teams complete operational visibility, simplified data discovery, and one-click execution—on desktop or on the go.



Mobile-First UX:

Designed to eliminate multi-click navigation and provide seamless accessibility on smartphones and tablets.

Deep Data Search & Filtering:

Granular multi-parameter filtering across every department with instant drill-downs into source Odoo records.

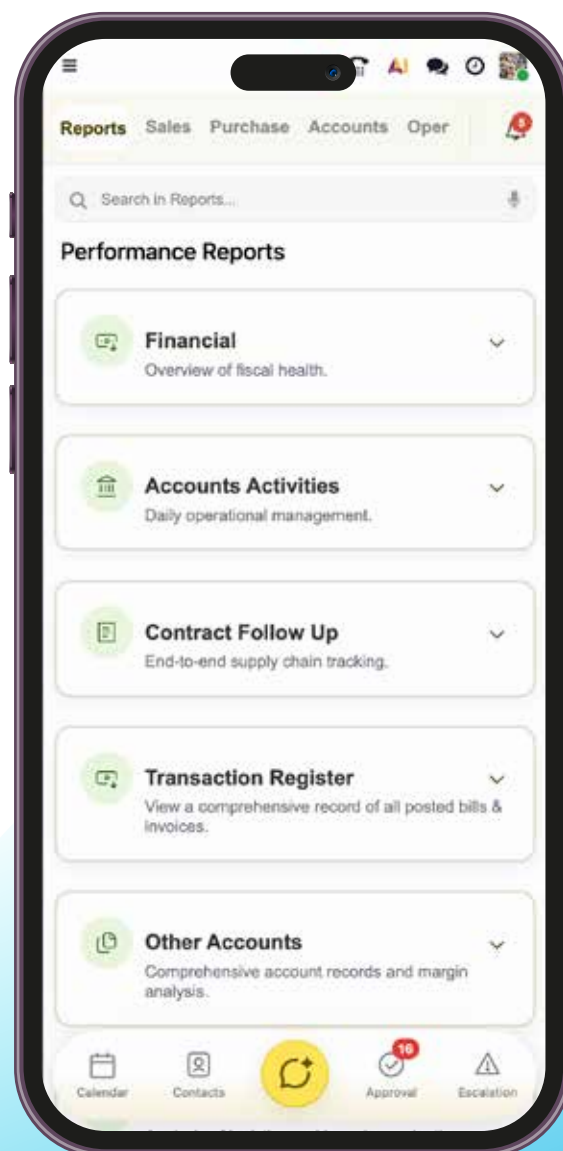
One Click Execution:

Instant creation of contracts, vouchers, and bills without stepping through fragmented Odoo menus.

KEY FEATURE MODULES

Reports Tab: Instant executive overviews and detailed operational & financial logs in a single tab.

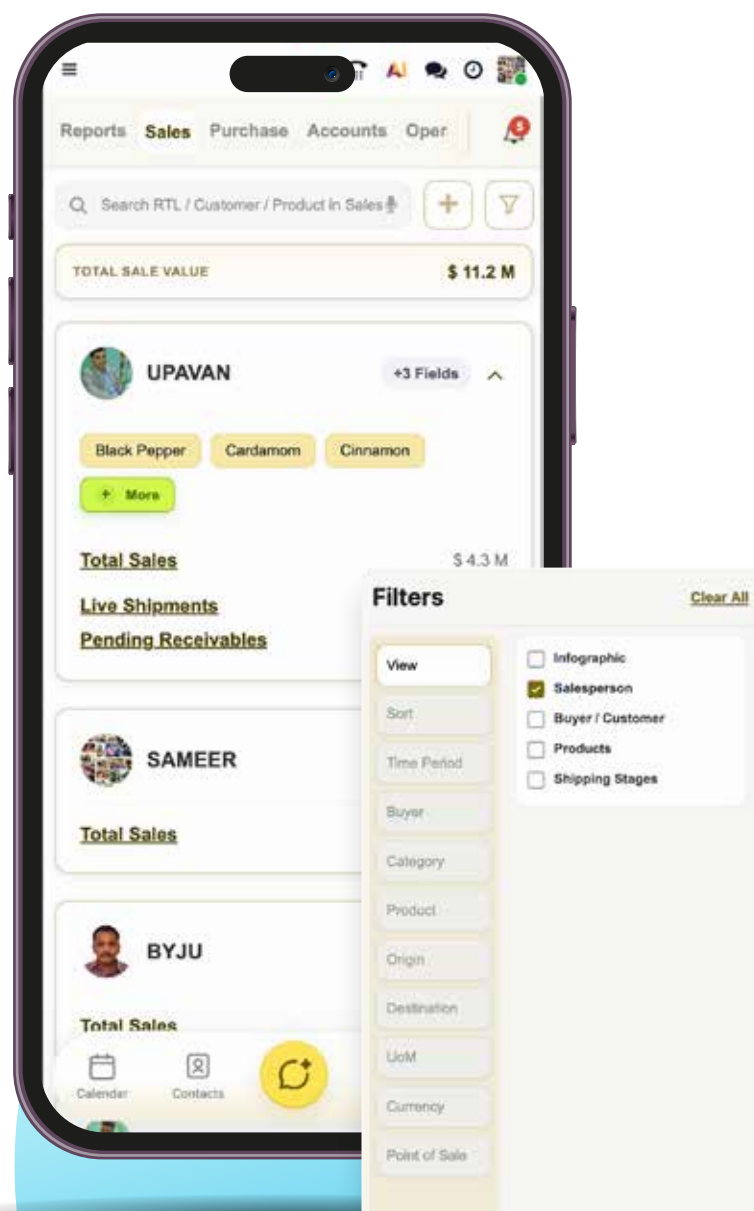
- **Financial Reports:** Gain instant, high-level visibility into company health with real-time NAV, Trial Balance, Balance Sheet, and P&L tracking.
- **Accounts Activities:** Monitor operational liquidity at a glance—access your Cashflow, Custom Duty, Daybook, and Receivables & Payables in seconds.
- **Contract Follow Up:** Track active shipments through every stage of the trade lifecycle such as Open Sale, Open Purchase, Pre-Shipment, Shipment, Post-Shipment, Port Clearance, Paused Shipment.
- **Transaction Register:** Keep complete financial audit trails with comprehensive logs for Sales, Purchases, Broker & Partner Commissions, Freight Bills, and Warehouse Bills.
- **Other Accounts:** Drill into granular ledger details with one-click access to Partner Ledgers, General Ledgers, and Operational Expenses.
- **Logistics & Inventory:** Safeguard your supply chain with live tracking across Current Stock, Vessel ETA Reports, and Stock Movements.



KEY FEATURE MODULES

Sales Tab: Track trade pipelines, analyze trader performance, and close deals effortlessly.

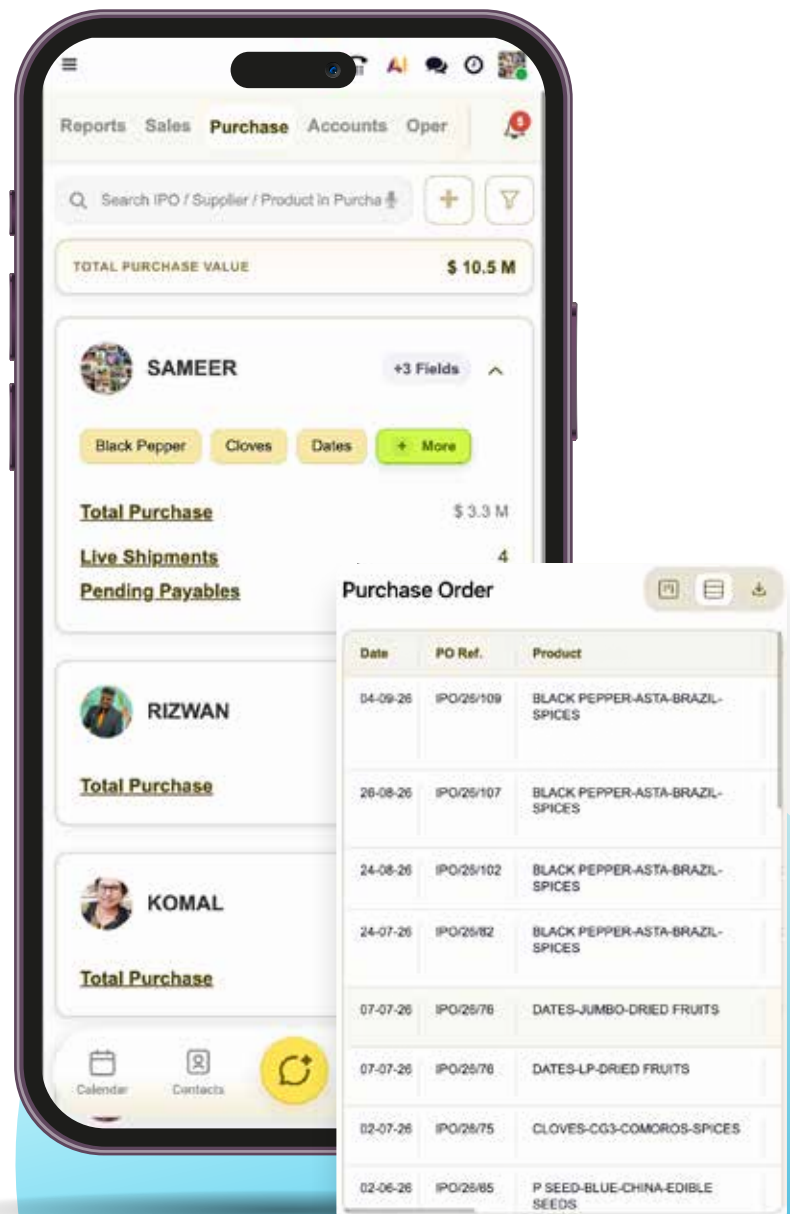
- **5 Dynamic Views:** Switch between Infographic, Salesperson (Default), Buyer/Customer, Products, and Shipping Stages.
- **Trader-Centric Insights:** In the default Salesperson view, view sales split across different traders, trader-wise sales orders, live shipments, and pending receivables.
- **Actionable Drill-Downs:** Tap into deeper listings rendered in Card View or List View, export records directly in PDF & Excel format, or enter the source contract directly with one click.
- **Granular Multi-Filters:** Filter sales data by Time Period, Buyer, Category, Product, Origin, Destination, UoM, Currency, and Point of Sale.
- **Fast Contract Creation:** Create a sales contract directly from this screen with the click of a button.



KEY FEATURE MODULES

Purchase Tab: Full procurement cycle management customized for international commodity sourcing.

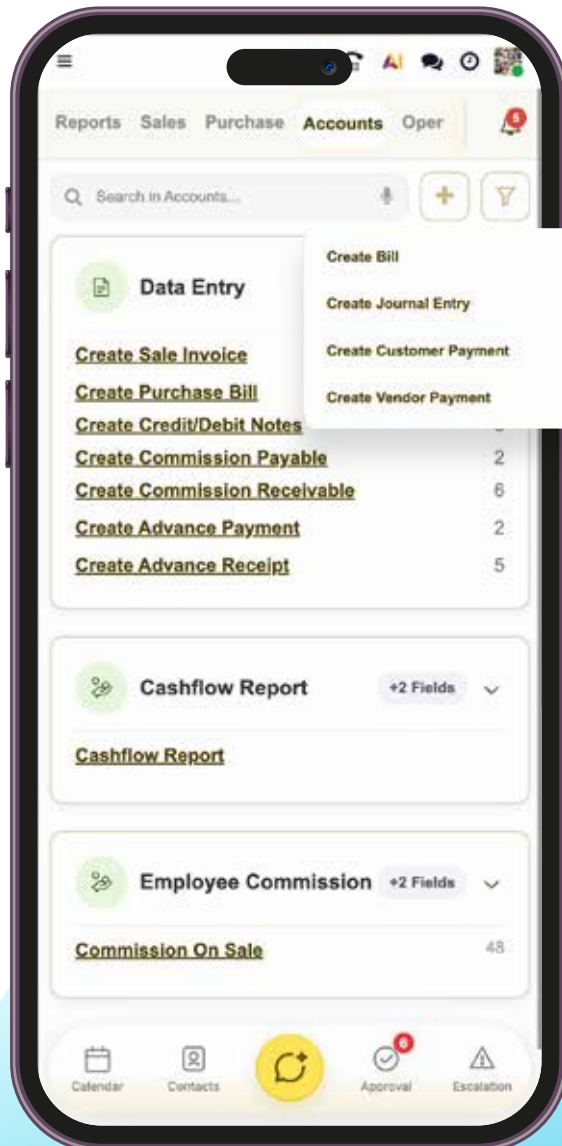
- **Flexible Views:** Toggle between Purchase Person (Default), Infographic, Seller/Supplier, Products, and Shipping Stages.
- **Procurement Intelligence:** Map purchase orders, live shipments, and pending payables trader-wise.
- **Quick Sourcing:** Create a purchase contract directly from this screen with the click of a button.
- **Advanced Filtering:** Sort procurement data by Time Period, Supplier, Category, Product, Origin, Destination, UoM, Currency, and Point of Purchase.
- **Document Access:** Deep-dive into itemized listings in Card or List view, download in PDF or Excel formats, or enter the source document with one click.



KEY FEATURE MODULES

Accounts Tab: Punch accounting entries easily without navigating complex ERP forms.

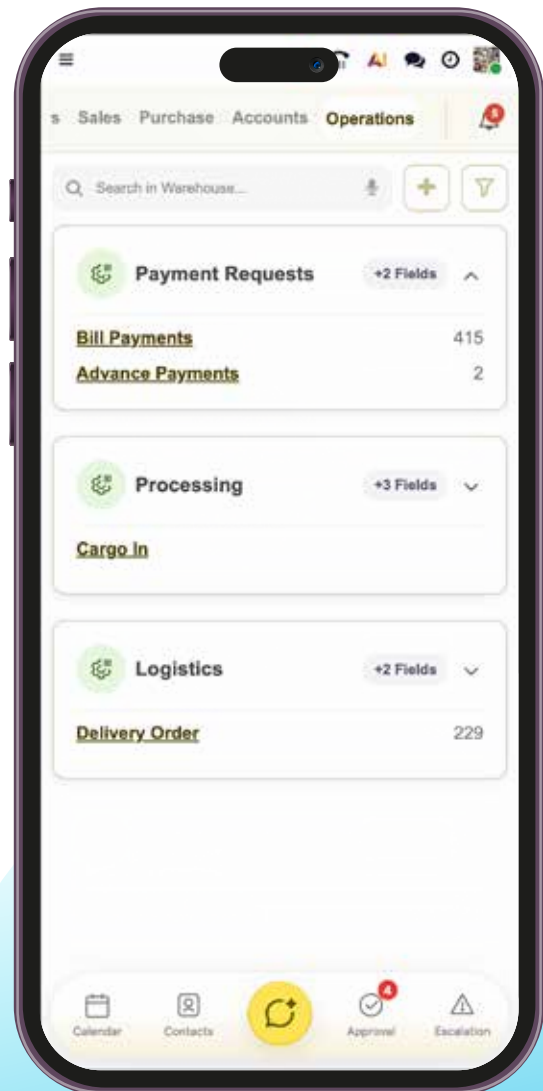
- **One-Click Entry:** Easily punch in accounting data with the click of a button and create bills, journal entries, and customer/vendor payments.
- **Unified Financial Navigation:** Easily view Sale invoices, Purchase bills, Credit/Debit notes, Payable/Receivable commissions, and Advance payment & receipt without too much navigation.
- **Source Document Access:** Instantly access source documents for all accounting items.
- **Multi-Dimensional Filters:** Filter information by Time Period, Trader, Seller, Buyer, Category, Product, Origin, Destination, Document Status, UoM, and Currency.



KEY FEATURE MODULES

Operations Tab: Execution tools built for logistics and fulfillment teams to keep physical trade movements running smoothly.

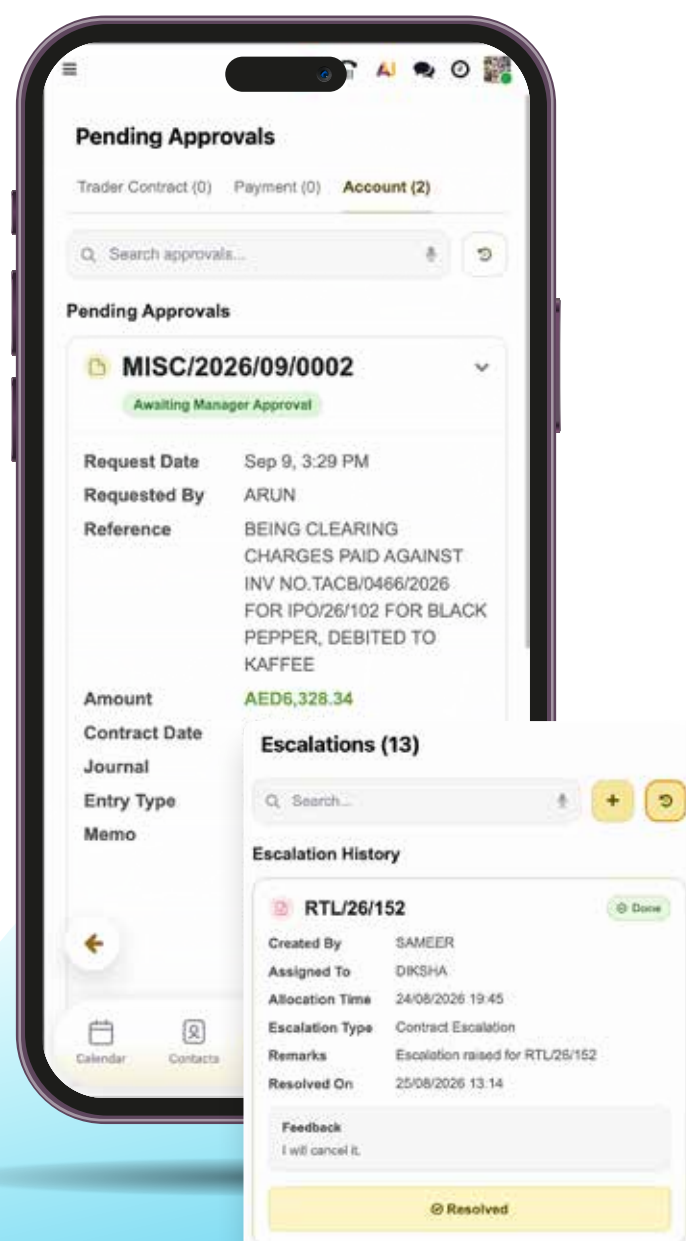
- **Contract Fulfillment Management:** Instantly track and review Delivery Orders (DO) and Goods Receipt Notes (GRN) generated directly against active sales and purchase contracts.
- **Multi-Directional Logistics & Inventory Mapping:** Process incoming goods, outgoing goods & cross trade shipments.
- **On-the-Spot Operational Disbursements:** Initiate critical trade-related payments directly from the operations screen with single-click actions:
 - **Bill Payments:** Settle freight, customs, port handling, and warehousing invoices.
 - **Advance Payments:** Issue required advance funds to suppliers or logistics agents to clear shipments.
 - **Miscellaneous Expenses:** Fast-track small operational fees, inspection costs, and unexpected port charges to keep shipments moving.



KEY FEATURE MODULES

Approvals & Escalations: Robust risk management controls ensuring strict policy compliance across all deals.

- **Approvals Engine:** All contracts and payments are sent to the trader and/or management for finalization and processing.
 - For account approvals, the accounts team takes action against approval requests only after management approval.
 - Rejected approval requests require mandatory feedback, which is notified to the person issuing the approval.
- **Priority Escalation Desk:** Raise escalations against contracts requiring immediate action (e.g., claims issues, payment issues).
 - Set timer-based urgency levels that stack requests by priority for the recipient.



KEY FEATURE MODULES

Automated Alerts & Proactive Reminders: Never miss a critical trade milestone or risk expensive port penalties. The system actively monitors key operational deadlines across your supply chain and triggers automated alerts before issues arise:

- **Freight & Warehouse Payments:** Automatic reminders for upcoming shipping line, port storage, and freight forwarder dues to avoid demurrage and detention charges.
- **Claims Management:** Timely notifications for filing, tracking, and resolving quality, weight, or transit claims before contractual deadlines expire.
- **Container Bookings:** Real-time reminders to book vessel space, confirm vessel allocations, and track container release schedules.
- **Container & Cargo Insurance:** Proactive alerts for policy renewals, marine cargo coverage, and risk compliance prior to shipment departure.
- **Contract Signatures:** Automated tracking and follow-ups for outstanding sales and purchase contracts awaiting buyer, supplier, or management sign-offs.

