

training - Bug #3004

Recieveable Finance Customer

08/18/2026 08:52 AM - Saransh Bakoliya

Status:	New	Start date:	08/18/2026
Priority:	Normal	Due date:	
Assignee:	Saransh Bakoliya	% Done:	0%
Category:		Estimated time:	0.00 hour
Target version:		Spent time:	5.00 hours
Description			

History

#1 - 08/18/2026 09:17 AM - Saransh Bakoliya

Service API Layer: Created receivablesService.ts integrating all endpoints for Finance Customers, Sales Invoices, and Customer Receipts.

Modular Tabbed UI: Built ReceivablesPage.tsx featuring a 3-tab layout for Finance Customers, Customer Invoices, and Customer Receipts.

Customer Master Table: Implemented the Finance Customer table with search, status filters, credit terms, and status badges.

Auto-Ledger Creation: Integrated POST /api/v1/master-data/finance-customer to create credit customers and auto-generate Sundry Debtors ledgers (CUST-####).

Debounce Duplicate Validation: Implemented live debounced validation to check duplicate customer names and GST numbers while typing.

Customer Profile Updates: Integrated PUT /api/v1/master-data/finance-customer/{id} to update customer details and sync linked ledgers.

Account Status Control: Integrated PATCH /activate and /deactivate endpoints with confirmation modals for account status management.

Customer Profile Drawer: Designed a detailed view drawer displaying credit days, credit limit, contact info, tax IDs, and ledger ID.

Sales Invoice Master Table: Implemented the Customer Invoices list view tracking invoice number, totals, tax, status, and balance due.

Dynamic Line-Item Invoice Builder: Built a multi-line invoice item creator with real-time rate, quantity, and GST (0-28%) calculation.

Draft Invoice Creation: Integrated POST /api/v1/master-data/sales/customer-invoice endpoint to generate draft sales invoices.

Invoice Posting Workflow: Integrated POST /{id}/post endpoint to post draft invoices, debiting Sundry Debtors and crediting Sales Revenue.

Invoice Cancellation & Deletion: Integrated POST /{id}/cancel and DELETE /{id} endpoints to cancel or soft-delete draft invoices.

Itemized Invoice Viewer: Created an Invoice Details drawer rendering full line items, subtotal, tax breakdown, and payment status.

Customer Receipts Ledger: Built the Customer Receipts list view tracking voucher numbers (BR/2026-27/####), payment modes, and allocations.

Collection Receipt Recording: Integrated POST /api/v1/master-data/sales/customer-receipts to record money received against posted unpaid invoices.

Sidebar & Route Integration: Configured permission-gated routing and sidebar navigation for Receivables under the Accounts menu (/company-admin/receivables).