# Basic Quotation, Production and Services Solution

## Description

This solution is a basic business application for the goods and services industry vertical.

The solution includes:

* Product and services quotation process
* Basic production process
* Basic logistic and installation service process

The customer has 3 choices about services:

* Delivery in warehouse
* Delivery to customer site
* Delivery to customer site plus installation service

Depending on the service selected the system will take different paths in the flow and yield different outcomes.

The solution also has products and models tables that the user or company may populate that will feed the quotations and work with quantities and prices.

Also, this solution works with the accounts and contacts tables from Dynamics 365 default tables.

The basic solution will be customized with customers’ needs as part of our offers.

## Definition of tables required for data logging

### Clients

For Customer information, we will use the tables provided by Dynamics, such as:

1. Contacts
2. Accounts
3. Mail

### Products

A table should contain the products, but you must see how to "configure" each product with its differential characteristics. That is, desks have a surface, armchairs, no. One way to do this is to have a table of products and another of models (look-up for each product).

The fields will be:

1. Product ID
2. Product Name
3. Model ID

### Models

Models must contain the relationship with the original product and must contain:

1. Model ID
2. Product ID
3. Model Name
4. Serial Number
5. Cost
6. Margin (%)
7. Price (Calculated)

### Quotations

Two tables are proposed; one for product quotations, another for service quotations, which must be related in the case of contracting any of the logistics and/or installation services.

### General Quotation Table

This table contains all the information from quotation to services status. Is the container of all flows information’s.

1. QuoteID (Primary, Autogen)
   1. QID-100xxxx
2. QuoteName (Text)
3. Description (Text)
4. Customer (Lookup from Dynamics 365 Account Table)
5. Design (Image)
6. WorkAcceptance (Image)
7. QuoteStatus (Choice)
   1. Started
   2. In progress
   3. Completed
   4. Delivered
   5. Accepted
   6. Rejected
8. ProductionStatus (Chioce)
   1. Started
   2. Manufacturing requested
   3. Manufactured
   4. In Quality Control
   5. In packaging
   6. Ready for delivery
9. ServiceStatus (Choice)
   1. In logistic programming
   2. Picked up by customer
   3. Delivered to the customer
   4. Received by the customer
   5. Installation in progress
   6. Installation accepted
10. ManufacturingReqDate (Date)
11. ManufacturingDelivDate (Date)
12. QCComplete (Yes/No)
13. Services (Chooice)
    1. Delivery in Warehouse
    2. Delivery to Customer
    3. Installation

### Products Quotation Table

This table contains the list of quoted products for each quote.

1. Item (Primary – Autonumber PRODQ-5000)
2. Producto (Lookup)
3. Modelo (Lookup *with filter*)
4. Quantity (Integer)
5. SubTotal (Currency – Calculated: (Model) Price \* Quantity)
6. Packaging OK (yes/no)
7. QA OK (yes/no)
8. Quote (Lookup)

### Services Quotation Table

This table contains the quotation of services for each quote in case services are contracted.

1. Item (Primary – Autonumber SERVQ-6000)
2. Service (Choice – Logistics / Installation)
3. Destination (Lookup from Account Address in Dynamics 365)
4. Cost (Currency)
5. Margin (decimal)
6. Price (Currency – calculated = Cost \*(1+Margin))
7. Quote (Lookup)

## Forms and Views

Forms and Views are designed for different processes, and people, in Commercial and Production and Services for Production and Services not to see commercial information.

# Business Process

Business processes should cover from the detection of an opportunity where a request for a quote (acceptance or rejection) is passed to a designer, to manufacturing and eventual shipment and installation.

We have 3 business processes:

* Quotation
  + Options: Products / Products + Delivery / Products + Delivery + Installation
* Production
* Services
  + Options: Delivery / Delivery + Installation

### Status indicators for each process:

To have information about the status of each process, a Status is defined with different options for each process. The progress to some status depends on other inputs and the progress of another’s depends on a manual action.

*Quote process status options:*

* Started – Default initial status.
* In progress – After entering basic information
* Completed – After completing product quotation if no services. After completed services quotations – Manual Input
* Delivered – After mail successful sent to customer
* Accepted – Manual Input
* Rejected – Manual Input

*Production process status options:*

* Started – After Quote acceptance. Manual input.
* Manufacturing requested – With Manufacture Requested date and Manufacturing Due date completed. Done with Cloud Flow.
* Manufactured. After completed ManufactDeliveryDate. Done with Cloud Flow.
* In Quality Control – When QC personnel takes the job – Manual input
* Quality Control completed – Automatic, after passing Control Flow. It populates QCComplete field thas is Required to pass to next stage. Done with Cloud Flow.
* In Packaging - When Packaging personnel takes the job – Manual input
* Packaging completed – Automated after completed PackagingEndDate – Done with Cloud Flow.

*Services process status options:*

* In Logistics Programming – Default initial status. Must complete **Customer Delivery Due Date** and Customer Installation Due Date if needed.
* **When No services:**
  + Ready for Customer Pick-up- Automated after **Customer Delivery Actual Date** complete
  + Picked up by customer – Automated after **Customer Reception Actual Date**
* **When Services:**
  + Delivered to customer – Automated after completed **Customer Delivery Actual Date**.
  + Received by customer – Automated after completed **Customer Reception Actual Date**. in Installation App.
  + Installation in progress – Automated after completed **Customer Installation Actual Date** in Installation App.
  + Installation accepted – Completed in Installation App – After Customer Sing-off in the app.

Business Process detail

Services Flows:

1. UpdateServiceStatusLogisticEnd
2. UpdateServiceStatusReadyforPickUp
3. UpdateServiceStatusPickedUpByCustomer (Finish Service Process)
4. UpdateServiceStatusDeliveredToCustomer
5. UpdateServiceStatusReceivedByCustomer (Finish Service Process)
6. UpdateServiceStatusInstallationInProgress
7. UpdateServiceStatusInstallationAccepted (Finish Service Process)

3-Finish Product Pick-up after complete Customer Reception Actual Date (the product is Picked-up by the customer)

2-Finish Product Preparation after complete Customer Delivery Actual Date (the product is ready for Pick-up)

4-Finish Product Delivery to customer after complete Customer Delivery Actual Date (the product delivered to customer site)

5-Finish Product Reception at Customer Site after complete Customer Reception Actual Date (the product is already delivered to the customer site)



Graphical user interface, application, Word

Description automatically generated

1-Finish Programming after complete Customer Delivery Due date

6-Begins with Customer Reception Actual Date and Customer Installation Actual Date in the App and goes to **Installation In Progress** Service Status

Finish with Work Acceptance Date and sign-off in the APP

4-Finish Product Delivery to customer after complete Customer Delivery Actual Date (the product delivered to customer site)