

# **EASY PROFIT**

## **SERVICE CRM**

**(Specialized for any service industry)**

## **USER MANUAL**

**Jerobyte Softwares Private Limited**

**Email : [sales@jerobyte.com](mailto:sales@jerobyte.com)**

**website: [www.jerobyte.com](http://www.jerobyte.com)**

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## 1. TO LOGIN INTO THE SOFTWARE BY ADMIN / CO-ORDINATOR

\* Type URL: (As Allotted to you)  
Ex: <https://jerobyte.com/test/>

\* Jerobyte window will open as in **Fig.1**

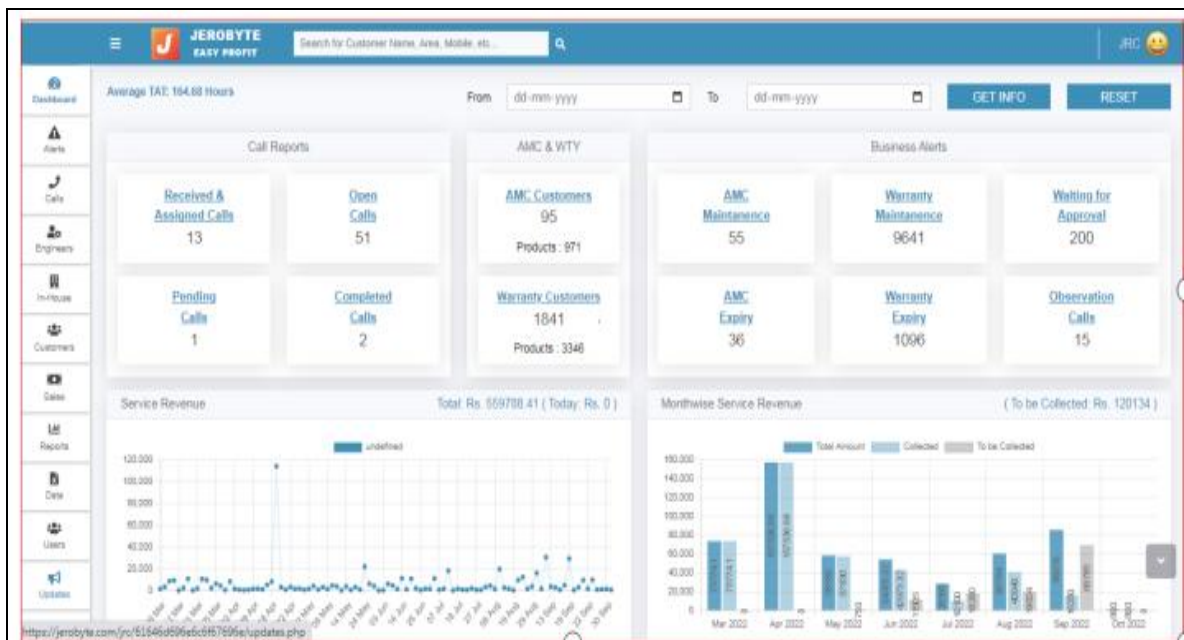


The login form features the Jerobyte logo at the top. Below it are two input fields: one for the email address 'test@jerobyte.com' and another for a password represented by dots. A 'Remember Me' checkbox is located below the password field. A blue 'Login' button is positioned below the checkbox. A yellow banner with a lock icon contains the text: 'Information Security is an important part of our business and we maintain the privacy.' At the bottom, a message reads: 'Judicious Evolvement, Repeated and Organized Business to You Through Expert Software for PROFIT For Technical Support, Please Contact +91-9486781555'.

**Fig.1**

\* Type user name : [jexxxx@jexxxx.com](mailto:jexxxx@jexxxx.com)  
Password : Test@2022

\* Dashboard will open as in **Fig.2**



**Fig.2**

## 2. USER CREATION

\* User Means whoever handles this Software with login is considered as a user.

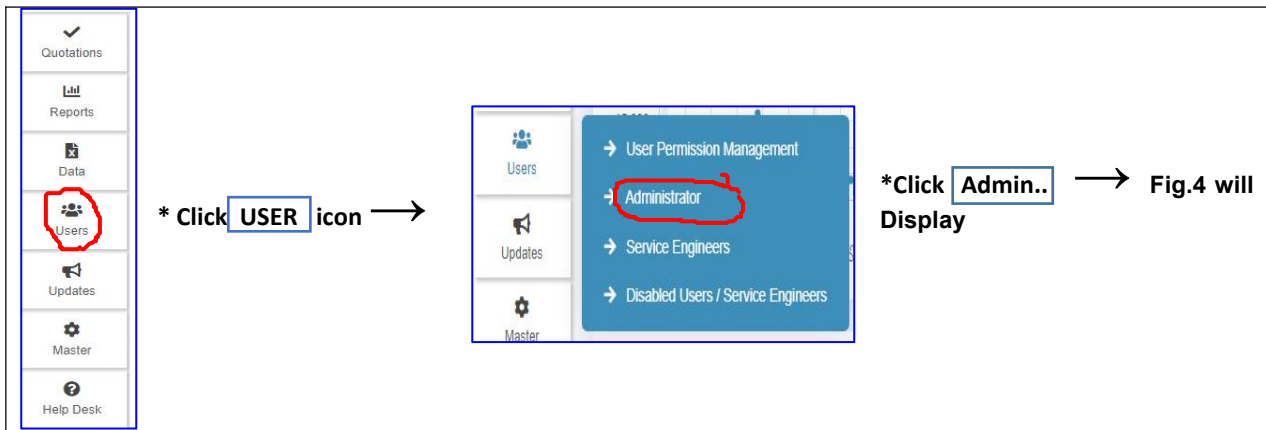


Fig.3

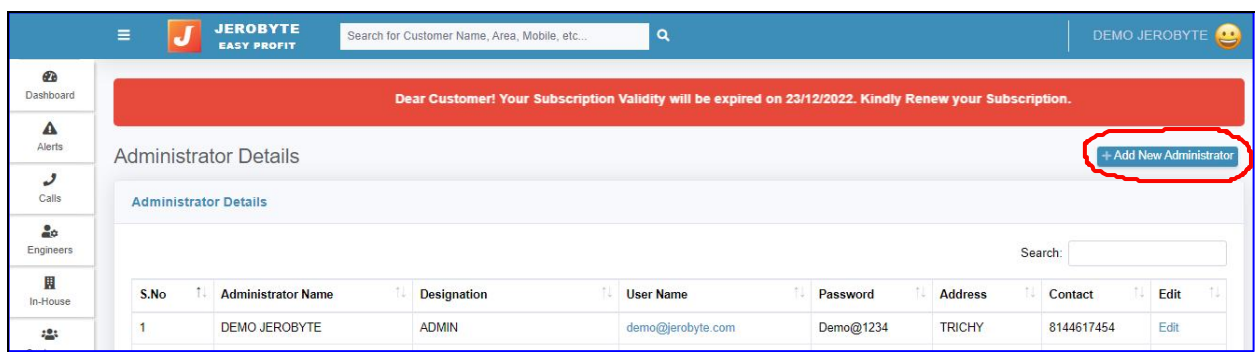


Fig.4

\* Click **ADD NEW** as in Fig.4 the Following image will be displayed as in Fig.5.

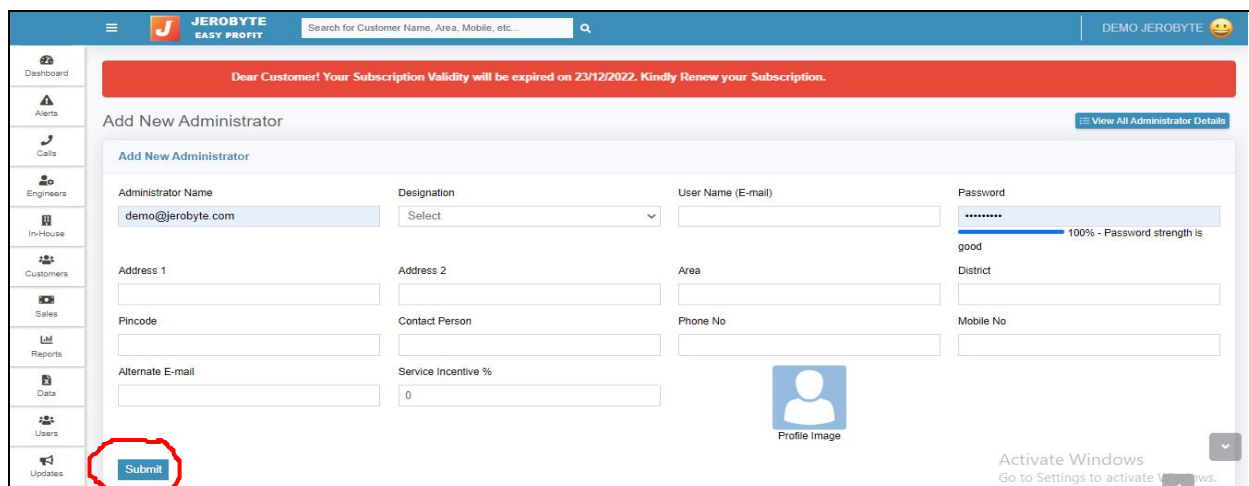


Fig.5

\* Add all Relevant details and click **SUBMIT**

\*Note: For creation of password use caps and low, special character and numeric.

Eg: Ravi@1234

## ADD SERVICE ENGINEER

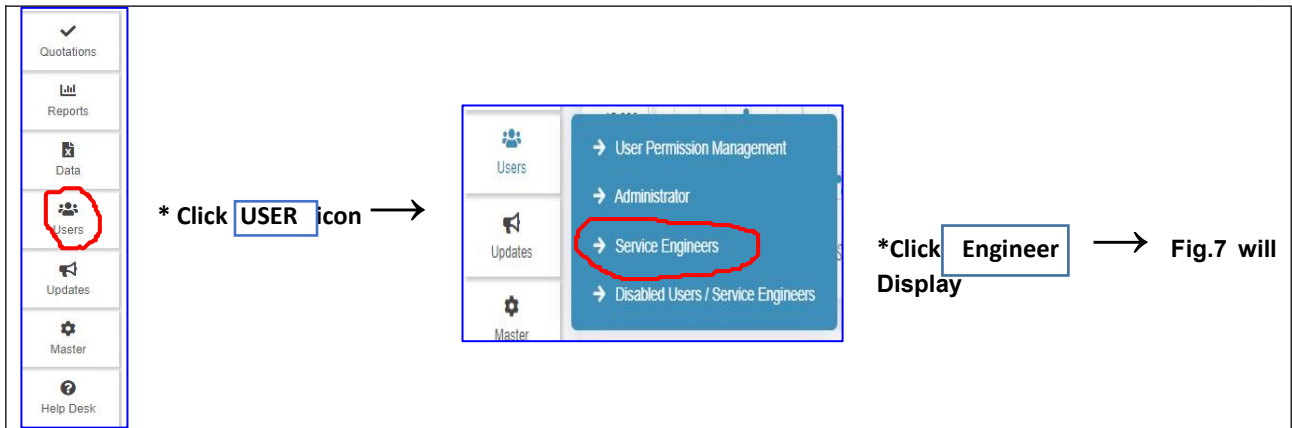


Fig.6

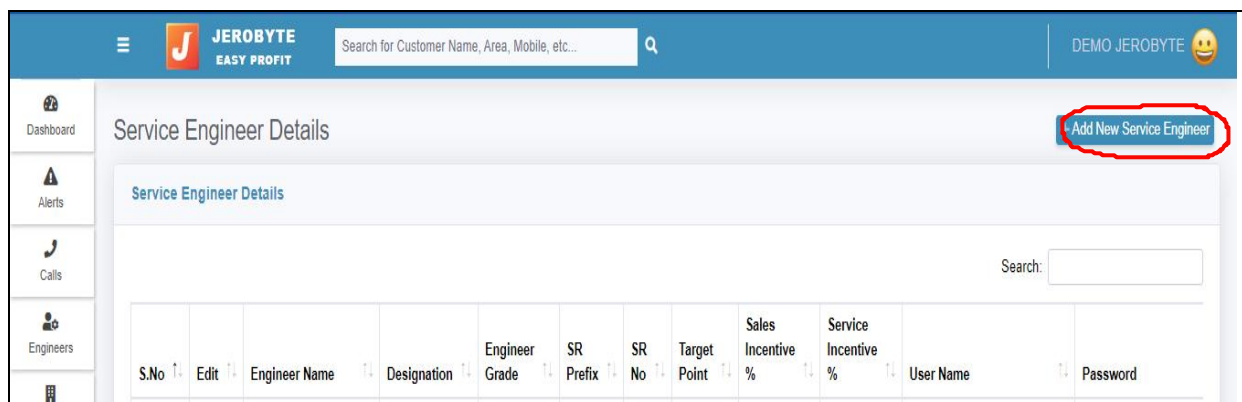


Fig.7

\* Click **ADD NEW** as in Fig.7 the Following image will be displayed as in Fig.8.

Fig.8

\* Add all Relevant details and click **SUBMIT**. Few details as below.

**Service Report Prefix** - First three letters of Engineer's Name to identify the Reports who has done.  
**Eg: VINOTH - type VIN**

**Service Report Starting No** - Type '0' (zero) so that that engineer service call report number will starts from '0001'

**Target Point** - Type any numeric value. Eg. '0'

**Lat-long** - Select Get Lat-long Adjust the correct home location of the Engineer.

Service Incentive %

- Option to give Incentives for the Engineers.

\* Repeat till all Service Engineers are added.

\* Then go to **Disabled user/ Service Engineers** in **USER** menu and **Click** to Enable.

\* Note: For creation of password use caps and low, special character and numeric.

Eg: Ravi@1234

## USER PERMISSION MANAGEMENT

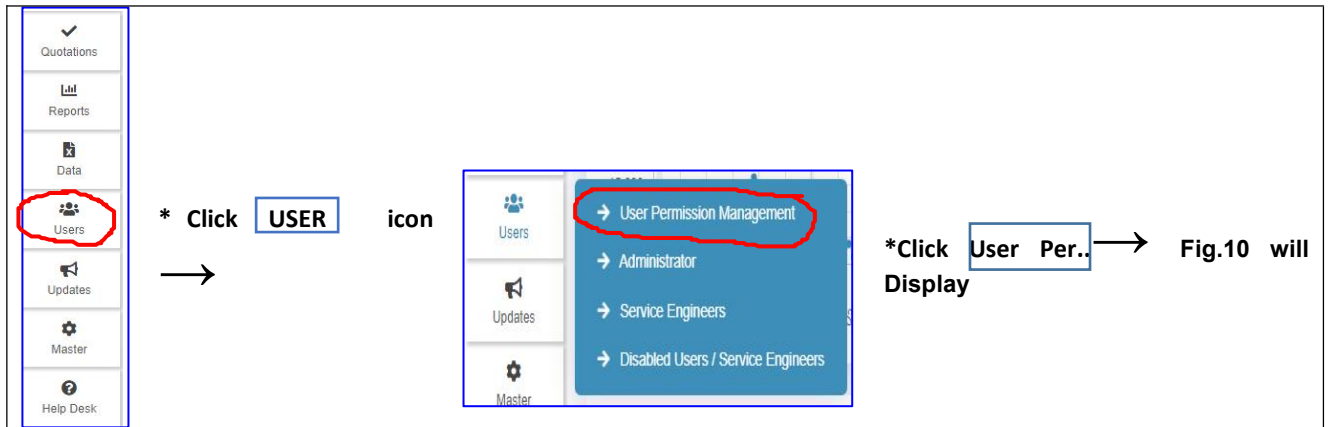


Fig.9

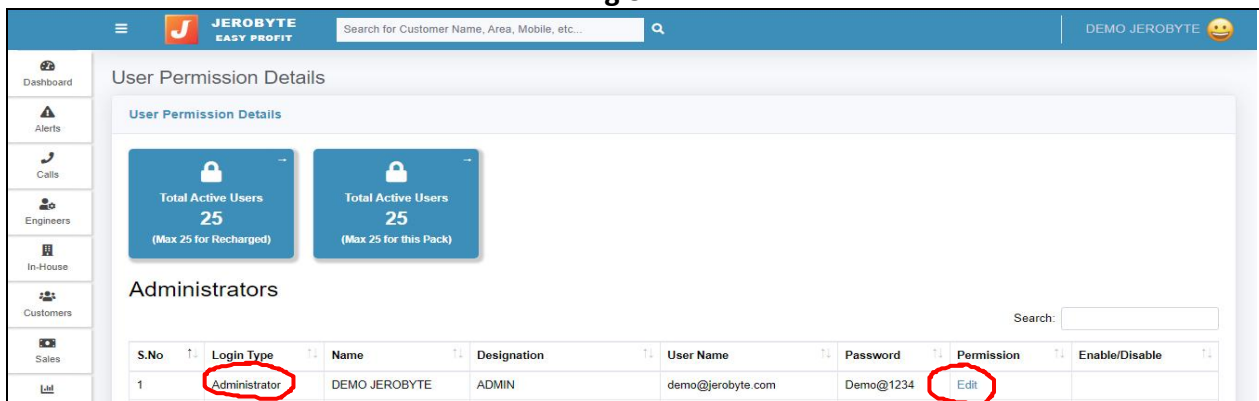


Fig.10

\* Click Administrator → **Edit** (Call Coordinator/Manager /Owner) image as below



Fig.11

\* From the above menu the level of permissions for the users can be approved by selecting the check box.

### 3. MASTER CREATION - FORM SETTING

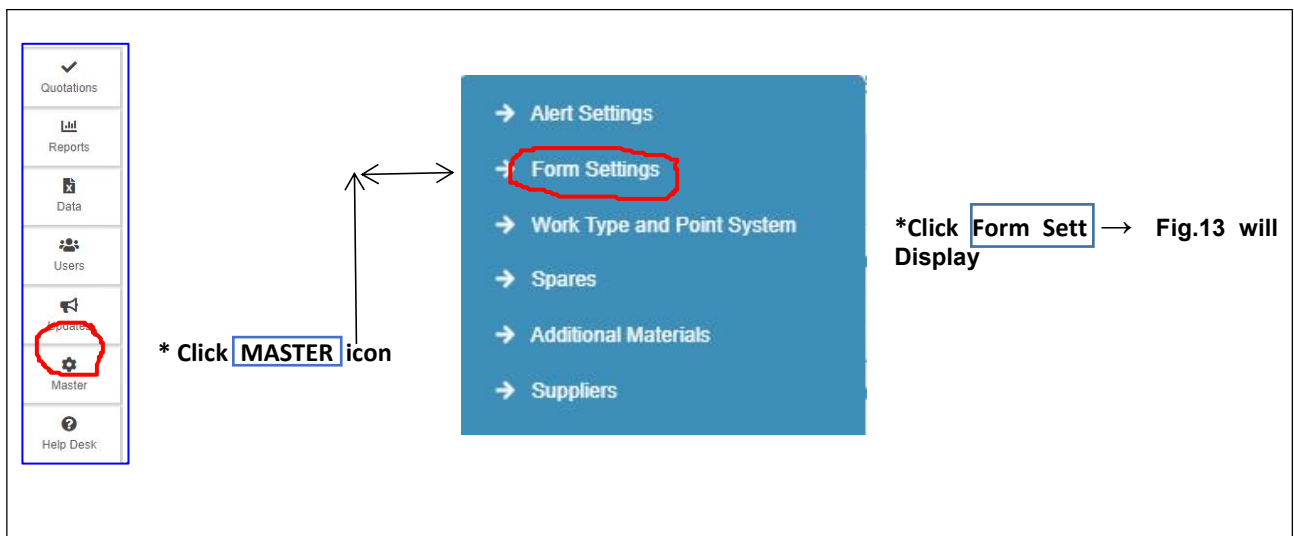


Fig.12



## CUSTOMER FORM

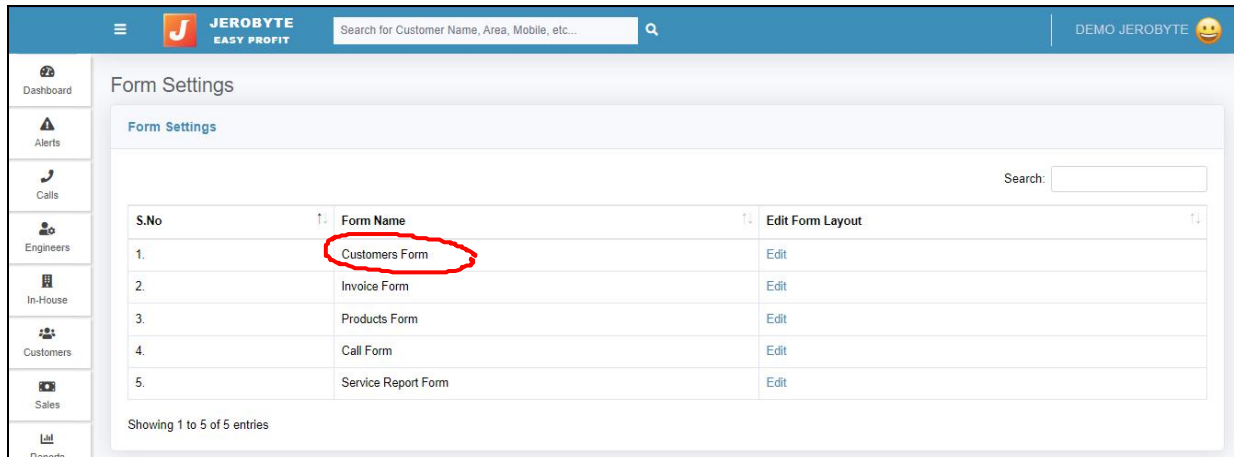
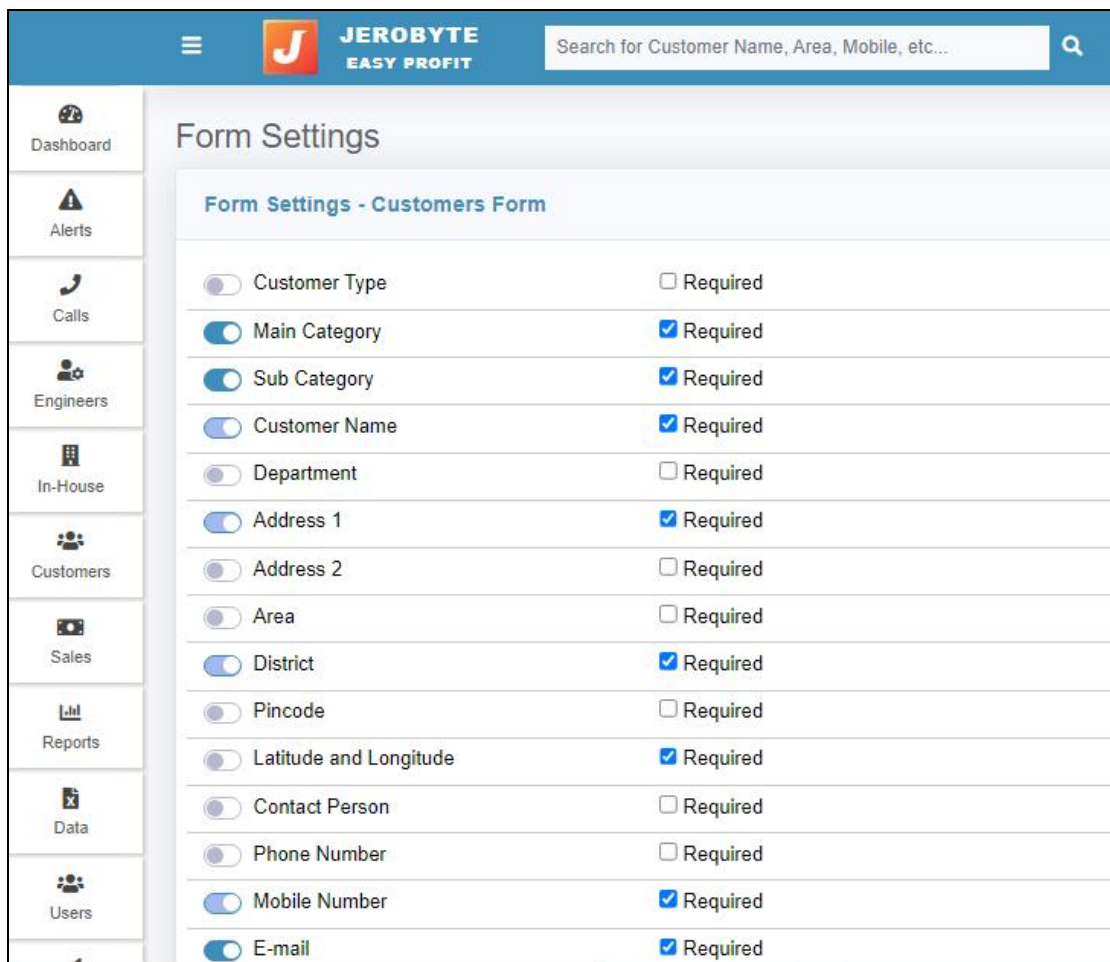


Fig.13

\* Click **EDIT** in Customer Form the following Image will be Displayed as in Fig.14



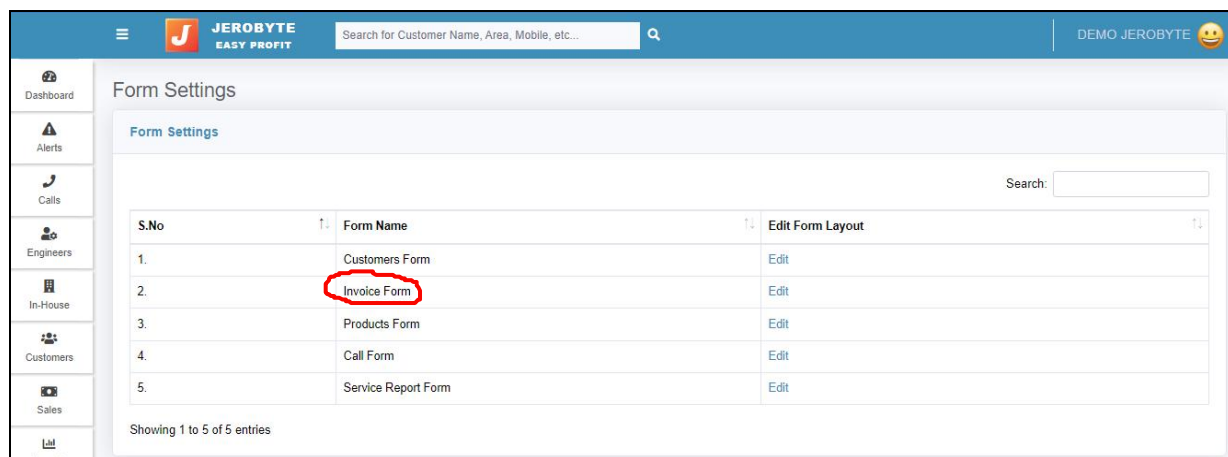
Field	Required
Customer Type	<input type="checkbox"/>
Main Category	<input checked="" type="checkbox"/>
Sub Category	<input checked="" type="checkbox"/>
Customer Name	<input checked="" type="checkbox"/>
Department	<input type="checkbox"/>
Address 1	<input checked="" type="checkbox"/>
Address 2	<input type="checkbox"/>
Area	<input type="checkbox"/>
District	<input checked="" type="checkbox"/>
Pincode	<input type="checkbox"/>
Latitude and Longitude	<input checked="" type="checkbox"/>
Contact Person	<input type="checkbox"/>
Phone Number	<input type="checkbox"/>
Mobile Number	<input checked="" type="checkbox"/>
E-mail	<input checked="" type="checkbox"/>

Fig.14

\* Select your Appropriate Customer requirement to input the data in this Software which is suitable for your business and click **SUBMIT**

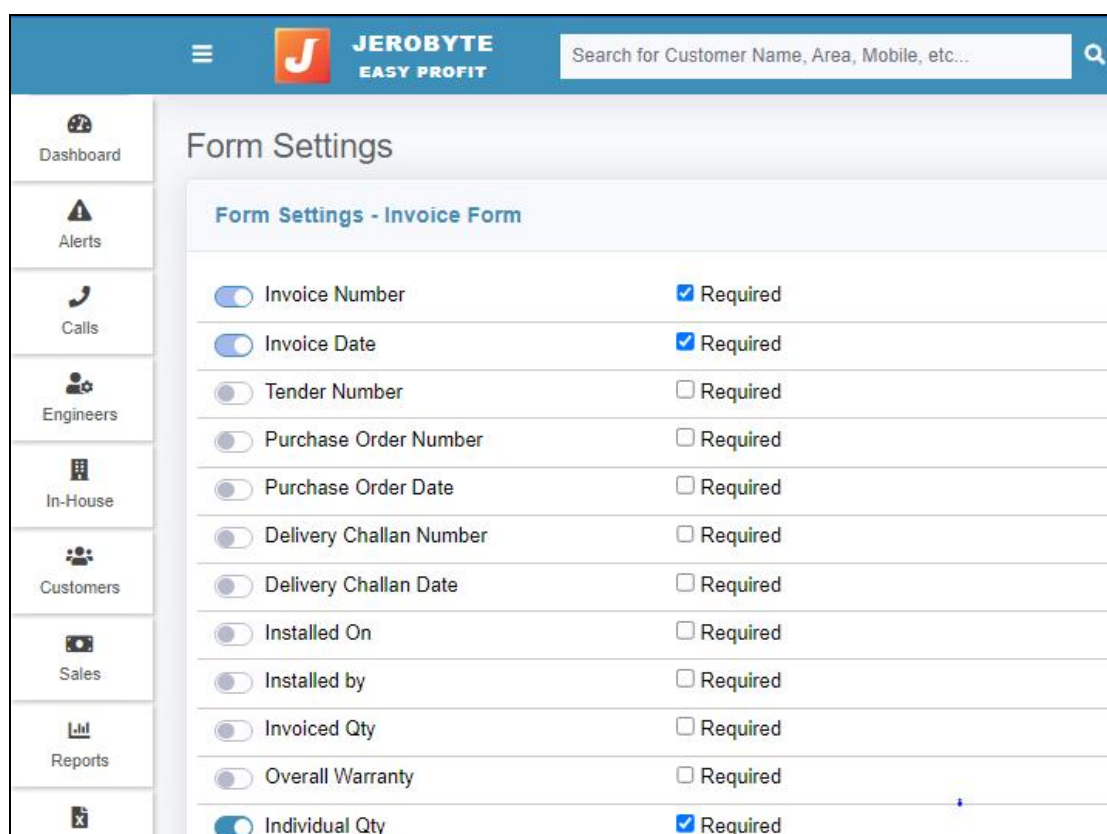


## INVOICE FORM



S.No	Form Name	Edit Form Layout
1.	Customers Form	Edit
2.	Invoice Form	Edit
3.	Products Form	Edit
4.	Call Form	Edit
5.	Service Report Form	Edit

\* Click **EDIT** in Invoice Form the following Image will be Displayed as in **Fig.15**

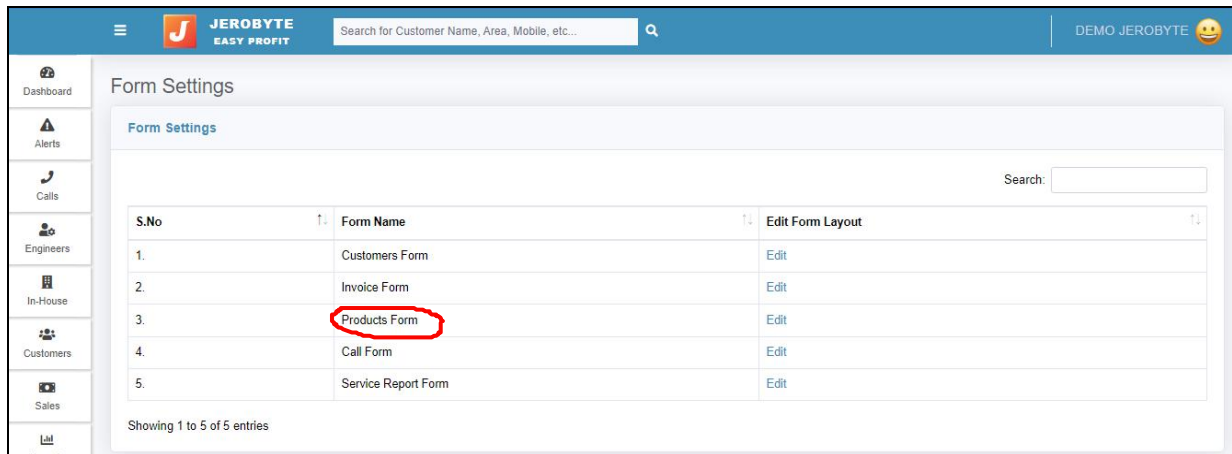


Field	Required
Invoice Number	<input checked="" type="checkbox"/>
Invoice Date	<input checked="" type="checkbox"/>
Tender Number	<input type="checkbox"/>
Purchase Order Number	<input type="checkbox"/>
Purchase Order Date	<input type="checkbox"/>
Delivery Challan Number	<input type="checkbox"/>
Delivery Challan Date	<input type="checkbox"/>
Installed On	<input type="checkbox"/>
Installed by	<input type="checkbox"/>
Invoiced Qty	<input type="checkbox"/>
Overall Warranty	<input type="checkbox"/>
Individual Qty	<input checked="" type="checkbox"/>

**Fig.15**

\* Select your Appropriate Invoice requirement to input the data in this Software which is suitable for your business and click **SUBMIT**

## PRODUCTS FORM



Form Settings

Form Settings

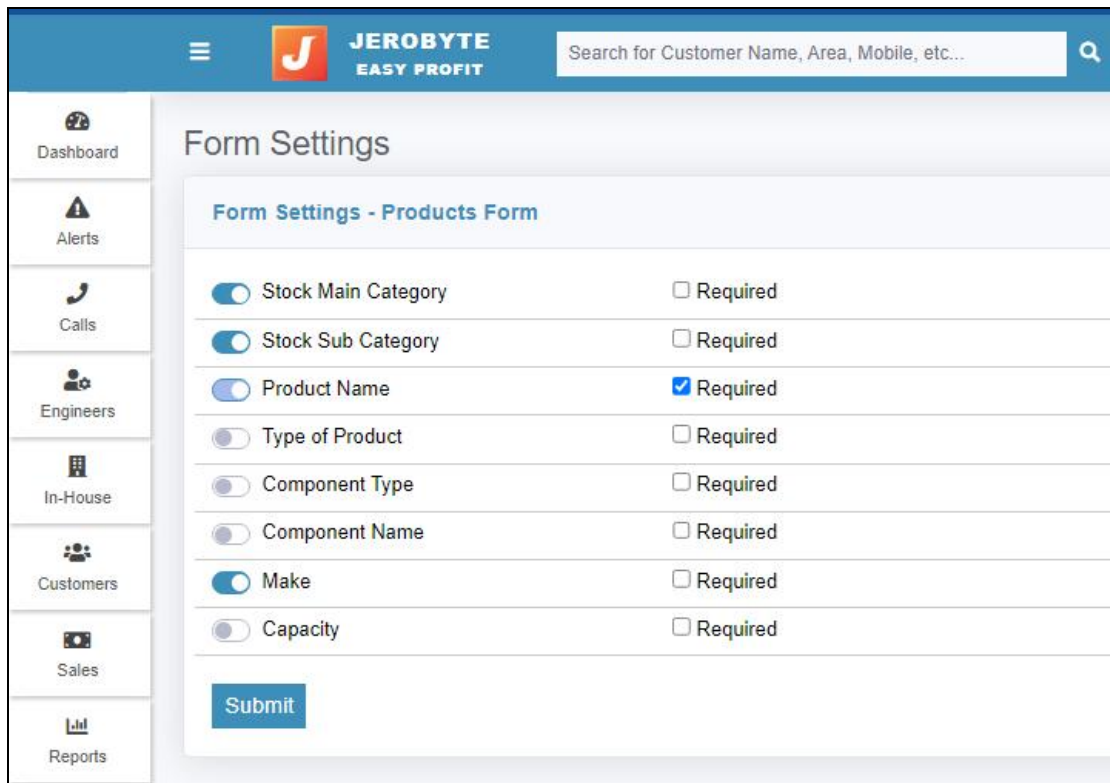
Search:

S.No	Form Name	Edit Form Layout
1.	Customers Form	Edit
2.	Invoice Form	Edit
3.	Products Form	Edit
4.	Call Form	Edit
5.	Service Report Form	Edit

Showing 1 to 5 of 5 entries

Fig.16

\* Click **EDIT** in Products Form the following Image will be Displayed as in Fig.17



Form Settings

Form Settings - Products Form

☒ Stock Main Category ☐ Required

☒ Stock Sub Category ☐ Required

☒ Product Name ☒ Required

☐ Type of Product ☐ Required

☐ Component Type ☐ Required

☐ Component Name ☐ Required

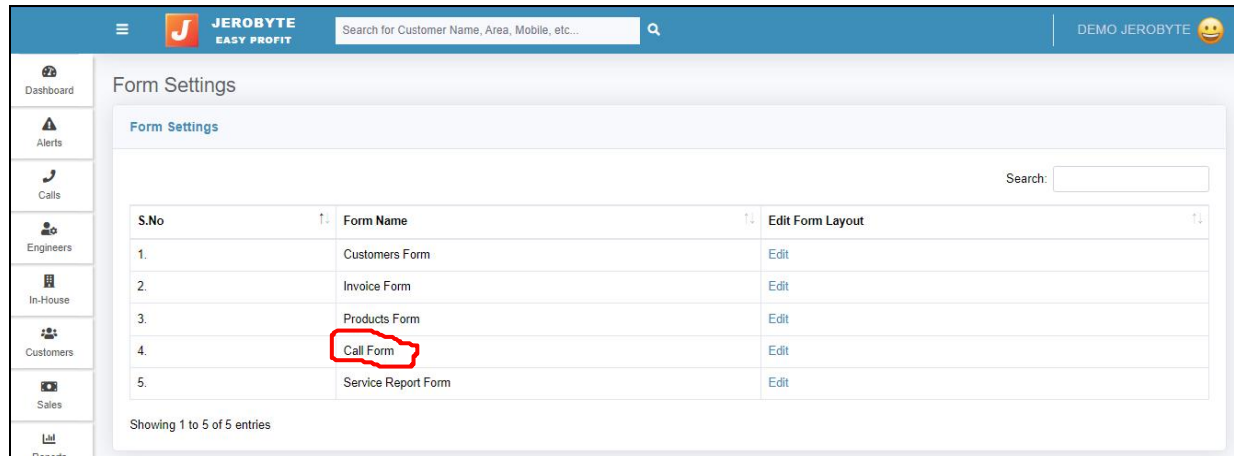
☒ Make ☐ Required

☐ Capacity ☐ Required

Fig.17

\* Select your Appropriate Products requirement to input the data in this Software which is suitable for your business and click **SUBMIT**

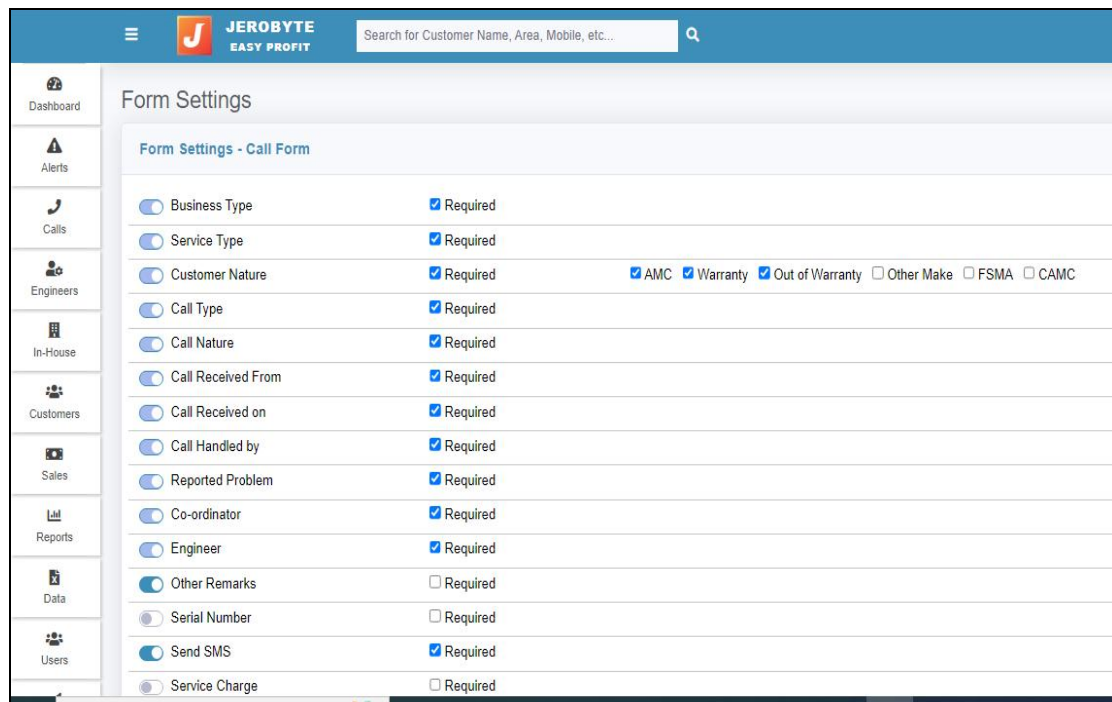
## CALL FORM



S.No	Form Name	Edit Form Layout
1.	Customers Form	<a href="#">Edit</a>
2.	Invoice Form	<a href="#">Edit</a>
3.	Products Form	<a href="#">Edit</a>
4.	<b>Call Form</b>	<a href="#">Edit</a>
5.	Service Report Form	<a href="#">Edit</a>

Fig.18

\* Click **EDIT** in Call Form the following Image will be Displayed as in Fig.19

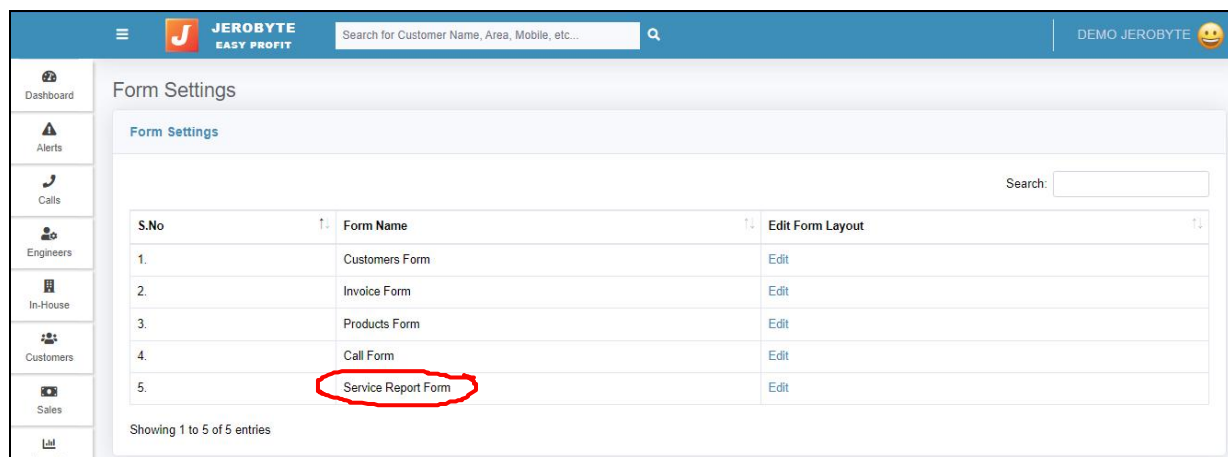


Field	Required
Business Type	<input checked="" type="checkbox"/>
Service Type	<input checked="" type="checkbox"/>
Customer Nature	<input checked="" type="checkbox"/>
Call Type	<input checked="" type="checkbox"/>
Call Nature	<input checked="" type="checkbox"/>
Call Received From	<input checked="" type="checkbox"/>
Call Received on	<input checked="" type="checkbox"/>
Call Handled by	<input checked="" type="checkbox"/>
Reported Problem	<input checked="" type="checkbox"/>
Co-ordinator	<input checked="" type="checkbox"/>
Engineer	<input checked="" type="checkbox"/>
Other Remarks	<input type="checkbox"/>
Serial Number	<input type="checkbox"/>
Send SMS	<input checked="" type="checkbox"/>
Service Charge	<input type="checkbox"/>

Fig.19

\* Select your Appropriate Call requirement to input the data in this Software which is suitable for your business and click **SUBMIT**

## SERVICE REPORT FORM



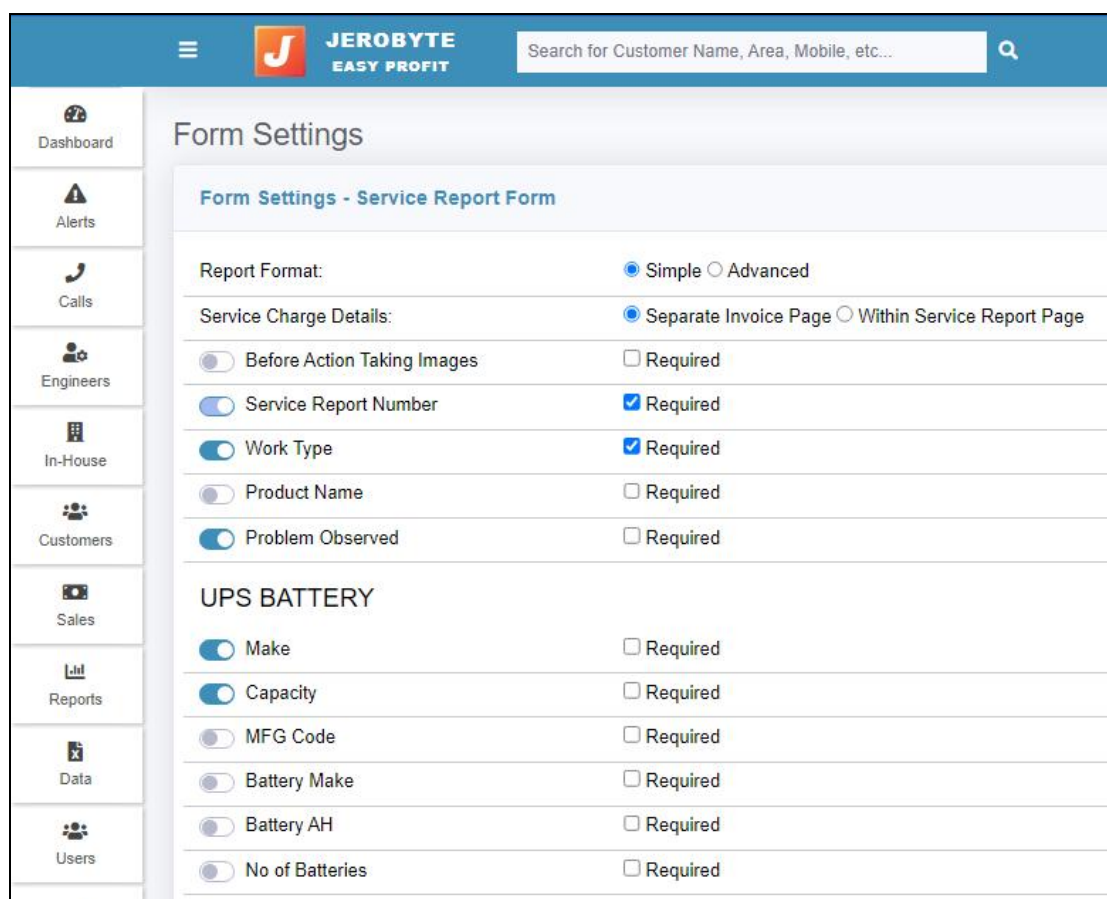
The screenshot shows the 'Form Settings' page in the JEROBYTE EASY PROFIT application. A sidebar on the left contains navigation links: Dashboard, Alerts, Calls, Engineers, In-House, Customers, Sales, and Reports. The main content area is titled 'Form Settings' and contains a table with the following data:

S.No	Form Name	Edit Form Layout
1.	Customers Form	<a href="#">Edit</a>
2.	Invoice Form	<a href="#">Edit</a>
3.	Products Form	<a href="#">Edit</a>
4.	Call Form	<a href="#">Edit</a>
5.	Service Report Form	<a href="#">Edit</a>

Below the table, it says 'Showing 1 to 5 of 5 entries'.

**Fig.20**

\* Click **EDIT** in Service Report Form the following Image will be Displayed as in Fig.21



The screenshot shows the 'Form Settings - Service Report Form' page. The page has a sidebar with navigation links: Dashboard, Alerts, Calls, Engineers, In-House, Customers, Sales, Reports, Data, and Users. The main content area is titled 'Form Settings - Service Report Form' and contains the following configuration options:

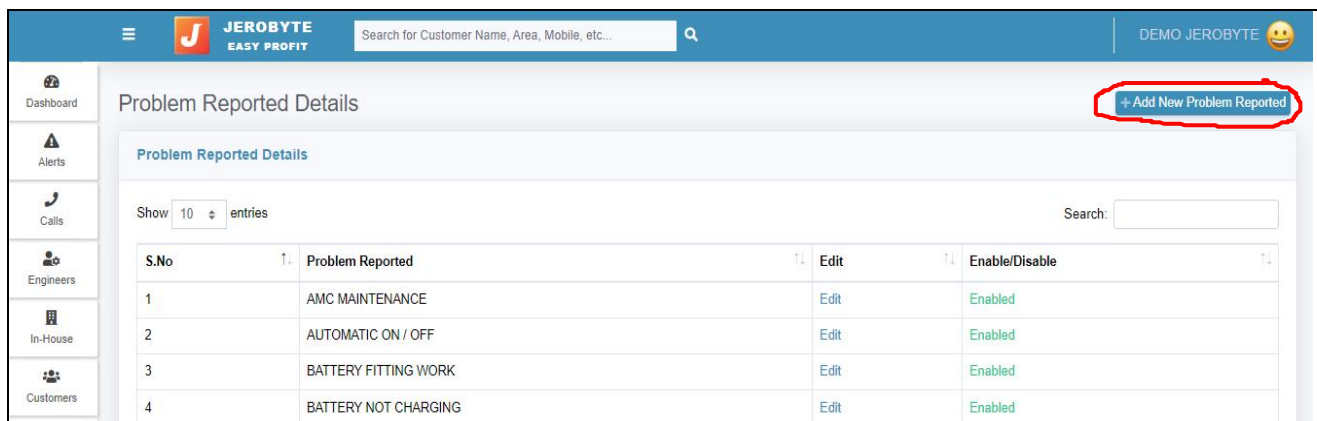
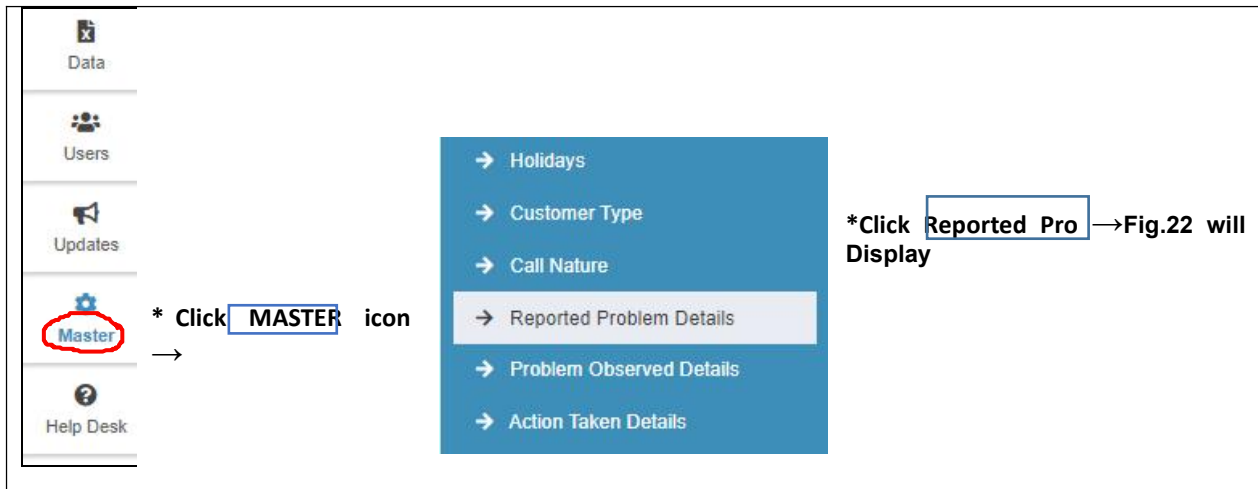
- Report Format:** ☒ Simple ☐ Advanced
- Service Charge Details:** ☒ Separate Invoice Page ☐ Within Service Report Page
- Before Action Taking Images:** ☐ Required
- Service Report Number:** ☒ Required
- Work Type:** ☒ Required
- Product Name:** ☐ Required
- Problem Observed:** ☐ Required
- UPS BATTERY:**
  - Make:** ☐ Required
  - Capacity:** ☐ Required
  - MFG Code:** ☐ Required
  - Battery Make:** ☐ Required
  - Battery AH:** ☐ Required
  - No of Batteries:** ☐ Required

**Fig.21**

\* Select your Appropriate Service Report requirement to input the data in this Software which is suitable for your business and click **SUBMIT**

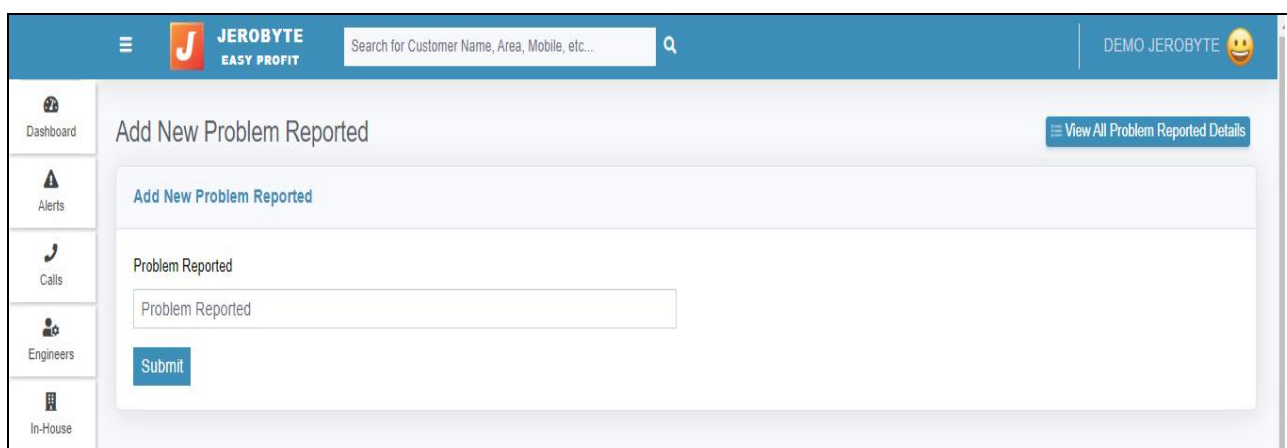
#### 4. MASTER CREATION - REPORTED PROBLEM DETAILS

- \* Master's are created to simplify the reporting task and to take specified report accurately.
- \* Reported Problem means nature of problem raised by the customer.



**Fig.22**

- \* Click **ADD NEW** the following **Fig.23** will be displayed as follows.



**Fig.23**

- \* Enter Reported Problem details suitable to your business and **SUBMIT**

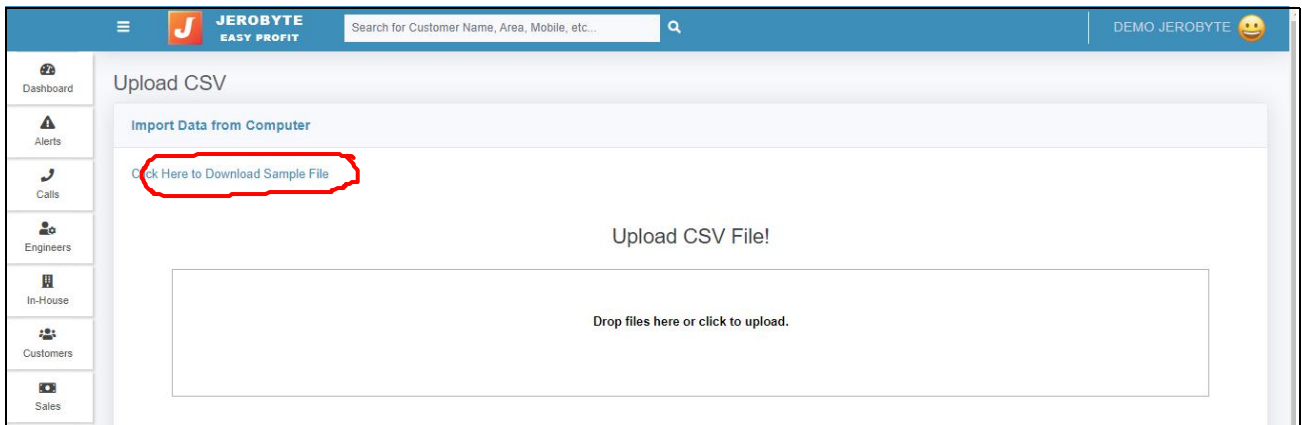
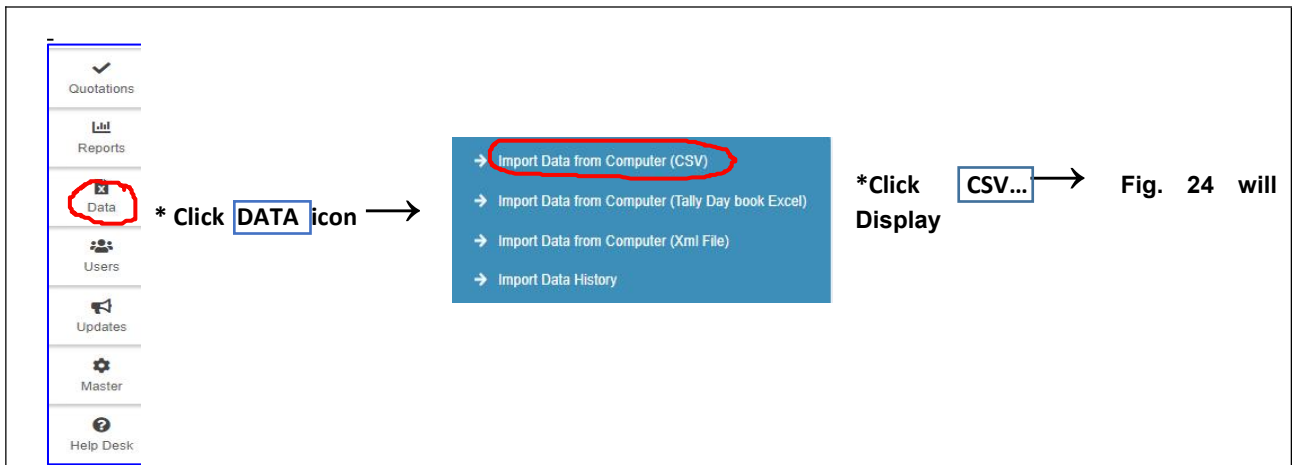
**Note:** Repeat the same procedure for

- |                                    |                                  |                                 |
|------------------------------------|----------------------------------|---------------------------------|
| * <b>PROBLEM OBSERVED</b>          | * <b>ACTION TAKEN</b>            | * <b>SPARES</b>                 |
| * <b>SUPPLIERS</b>                 | * <b>ADDITIONAL MATERIALS</b>    | * <b>CALL NATURE</b>            |
| * <b>CUSTOMER TYPE"</b>            | * <b>OTHER REFERENCE DETAILS</b> | * <b>CUSTOMER MAIN CATEGORY</b> |
| * <b>REGISTRATION TYPE DETAILS</b> | * <b>TENDER TYPE DETAILS"</b>    | * <b>DISTRICT DETAILS</b>       |

## 5. DATA MANAGEMENT - EXISTING DATA INTEGRATION

\* The existing Customers and their Product information can be uploaded with this Software immediately for any duration by this future.

### EXISTING DATA INTEGRATION - CSV FORMAT

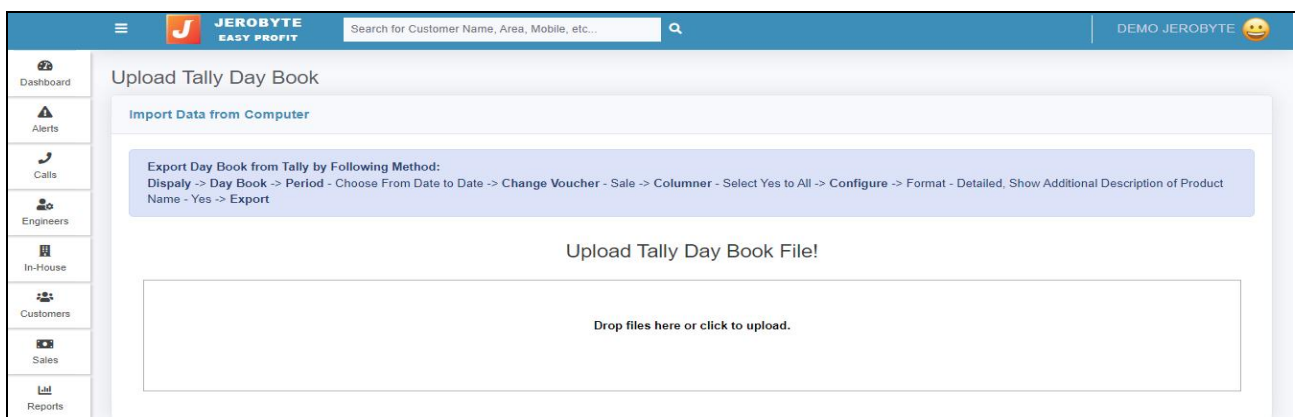
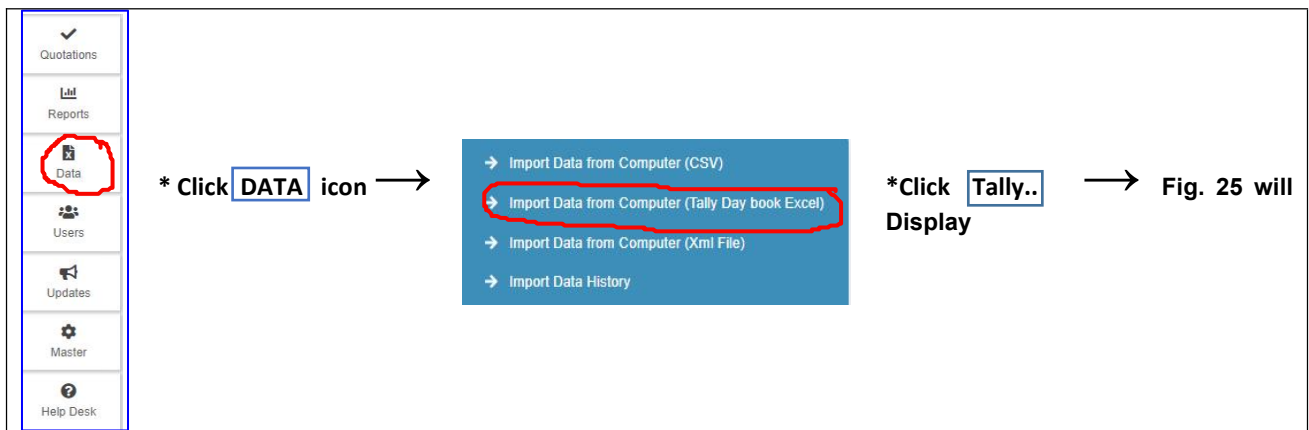


**Fig. 24**

- \* Click Download Sample File
- \* Fill the Required details in the given format in Downloaded Sample file.
- \* Click **Drop files** to upload the Filled Data.
- \* Select the required files in the saved location.
- \* After Selection of required file click Open.
- \* Your data will be uploaded, after uploading the following image will be displayed.



## EXISTING DATA INTEGRATION - TALLY FORMAT



**Fig. 25**

### Export Day Book from Tally by Following Method:

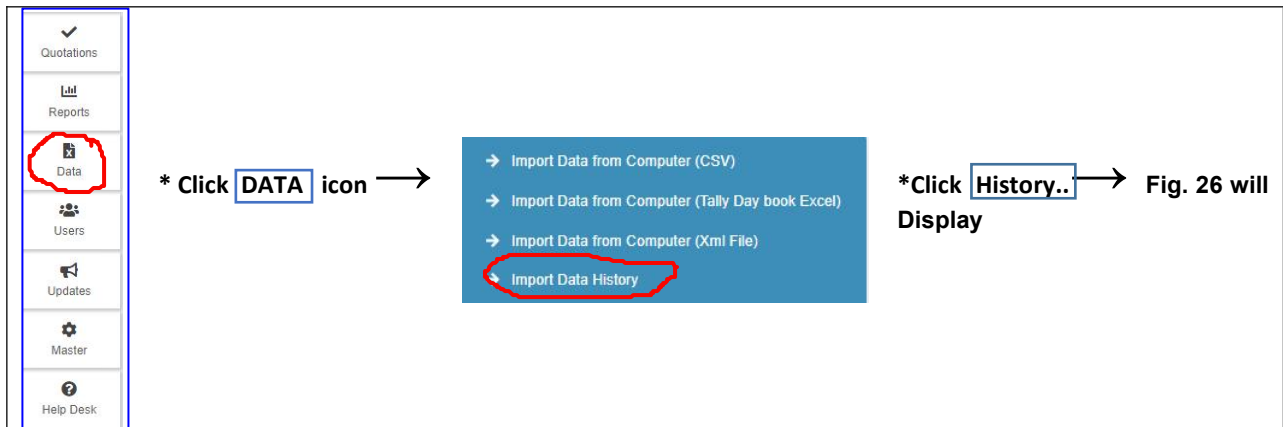
Display -> Day Book -> Period - Choose From Date to Date -> Change Voucher - Sale -> Columnar - Select Yes to All -> Configure -> Format - Detailed, Show Additional Description of Product Name - Yes -> Export

- \* Click **Drop files** to upload the Filled Data.
- \* Select the required files in the saved location.
- \* After Selection of required file click Open.
- \* Your data will be uploaded, after uploading the following image will be displayed.





## IMPORT DATA HISTORY



JEROBYTE EASY PROFIT						
Search for Customer Name, Area, Mobile, etc...						
DEMO JEROBYTE						
Dashboard	Upload CSV History					
Alerts	Upload CSV History					
Calls	Show 10 entries Search:					
Engineers	S.No	Upload By	Upload File	Upload On	Upload Records	Delete
In-House	1	demo@jerobyte.com	1669120479-jbs 22.11.2022.csv	2022-11-22 18:04:39	1	Delete
Customers	2	demo@jerobyte.com	1664540984-Breeze N Freeze - Datas(30.09.2022).csv	2022-09-30 17:59:44	1085	Delete
	3	demo@jerobyte.com	1659351395-APRIL - HITECH.xlsx	2022-08-01 16:26:35	196	Delete
	4	jrc@jerobyte.com	1637753923-23.11.2021.csv	2021-11-24 17:08:43	1	Delete

**Fig. 26**

\* The uploaded data can be verified

## 6. COMPLAINT REGISTRATION PROCEDURE - FOR EXISTING CUSTOMER

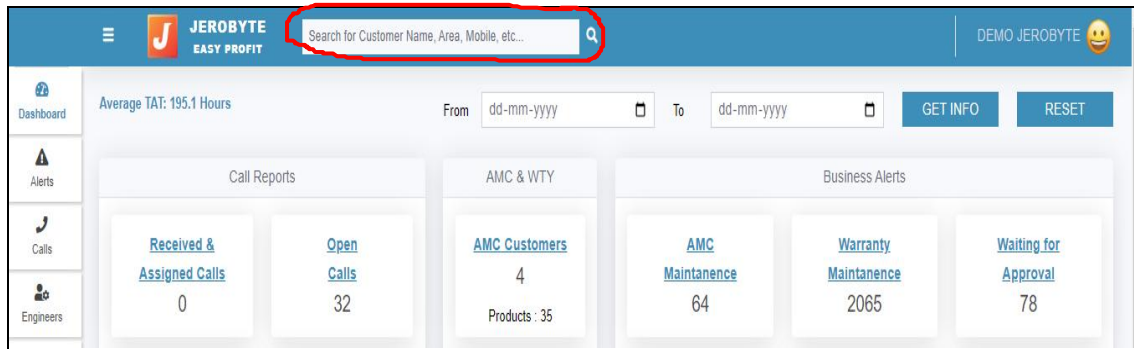


Fig.27 Main Dashboard Image

\* Type Customer Name, Mobile Number and Product Serial Number etc., in the **SEARCH** area in main dashboard.

\* Customer Name will come automatically displayed as below in Fig.28 and select **ENTER**.

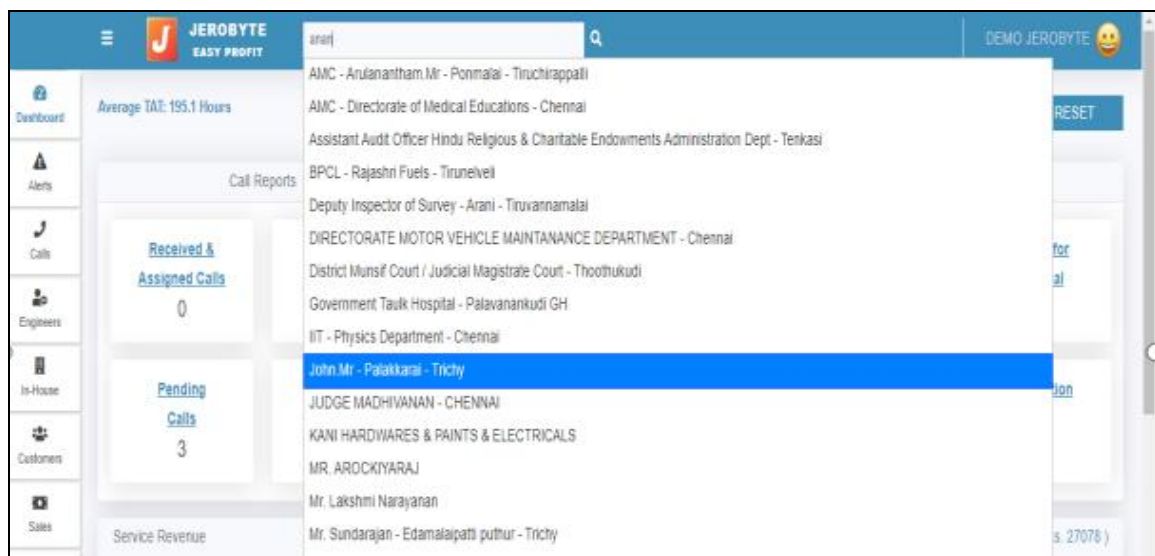


Fig.28

\* After selecting the customer Name the total product list of the customer will be displayed as in Fig.29.

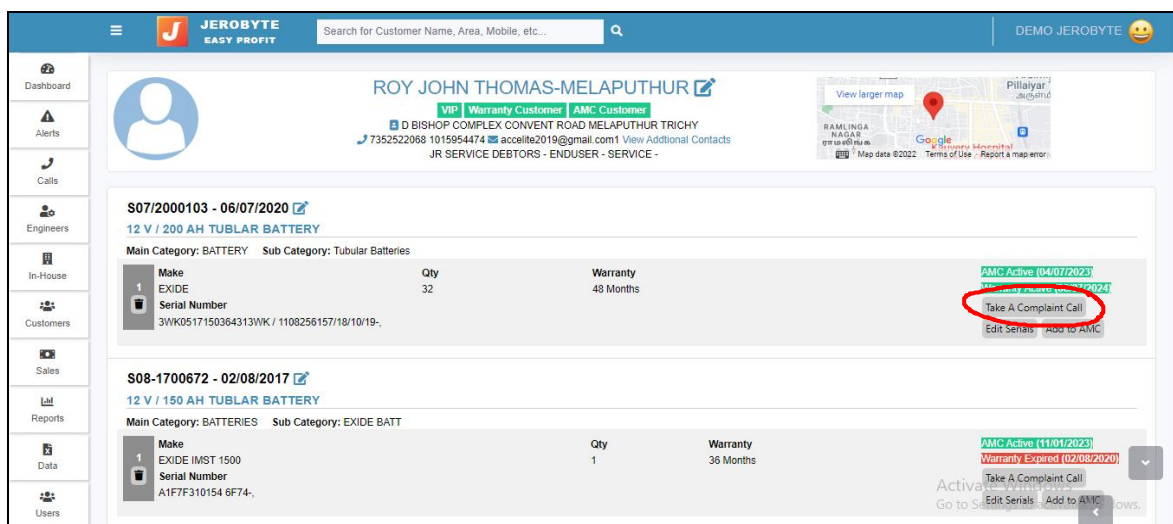


Fig.29

\* Click **TAKE A COMPLAINT CALL** as in Fig.30 will be Displayed.

Dashboard

Alerts

Calls

Engineers

In-House

Customers

Sales

Reports

Data

View All Complaint Call

Main Category	Sub Category	Customer Name	Address	Contact	Edit
JR SERVICE DEBTORS	ENDUSER - SERVICE	ROY JOHN THOMAS-MELAPUTHUR	D BISHOP COMPLEX CONVENT ROAD MELAPUTHUR TRICHY	7352522088 1015954474 accelle2019@gmail.com1	Edit

Product Details

Invoice Details

Product Details

Product Item 1

Serial Numbers

Call History

Show 10 entries

Search:

S.No	Call ID and Date	Call Details	Product Details	Problem Details	Status	Action
1	220903703 1015954474 28/09/2022 10:30:06 am Wait for Appr.	C/H: DIVYA C/O: DIVYA E: DURAI-PANDIYAN - JRC <div>UPS BATTERY</div> <div>On-Site</div> <div>Out of Warranty</div> <div>Complaint</div> <div>Change Details</div>	Tubular Batteries - 12 V / 200 AH TUBLAR BATTERY Serial:	Reported: AUTOMATIC ON / OFF Observed: Action: Narration:	Open	Edit

Nearby Engineers

Map Satellite

Nearby Customers

Map Satellite

Call Details

Business Type:

Service Type:

Customer Nature:

Call Type:

Call Nature

Reported Problem

Engineer Type

Customer SMS

SMS

WhatsApp

Mail

Submit

UPS BATTERY

Computers

Solar

CCTV

Air Conditioners

Lifts

Copier

RO Purifier

On-Site

Carry-In

AMC

Warranty

Out of Warranty

Service Call (Received from Customer)

Other Call (Service Related Activities)

Call Received From (Contact Number)

Call Received On

Call Handled By

Co-Ordinator Assigned

Other Remarks

Engineer Assigned

Co-Ordinator SMS

Engineer SMS

**Fig.30**

\* After taking compliant call the above form will be displayed. The nearest Engineer can be viewed in the Engineer's Location.

### Business Type

: Will be automatically selected.

Service Type

: We need to choose whether **Carry-in** or **Onsite**  
Carry-in means - Products Given or Taken to Service Centre.  
Onsite means - Attending Complaints at Customer site.

**Customer Nature**

: Will be automatically selected.

**Call Type**

: Need to be filled whether it is a **Service call** or **Other call**.

**Call Nature**

: Call Natures can be uploaded through Master like Delivery, Installation, Complaint, Maintenance etc. Any of these activities can be selected from Drop-down list as below.



**Call Received From  
(Contact Number)**

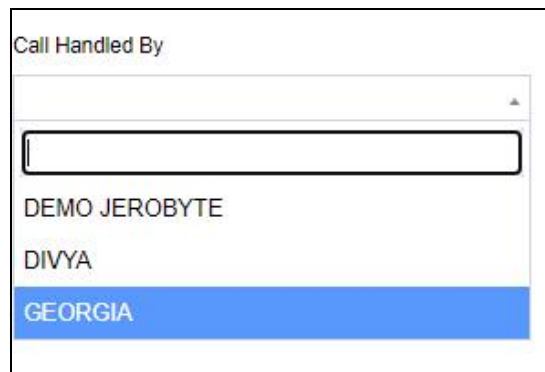
: Automatically uploaded ( if available)

**Call Received On**

: Will be automatically selected.

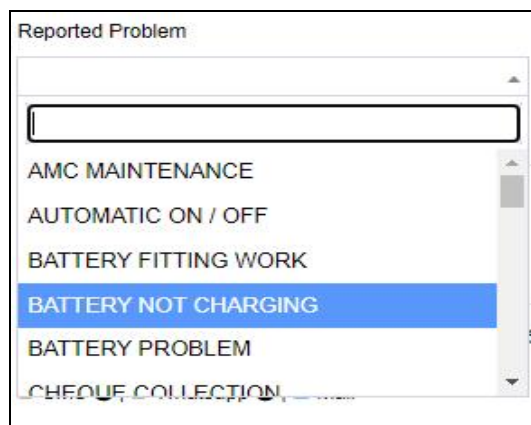
**Call Handled By**

: The Name of the call handlers can be uploaded through Master. Any of the call coordinator name can be selected from Drop-down list as below.



**Reported Problem**

: The Name of the Reported Problems can be uploaded through Master. Any of the Reported Problem can be selected from Drop-down list as below.

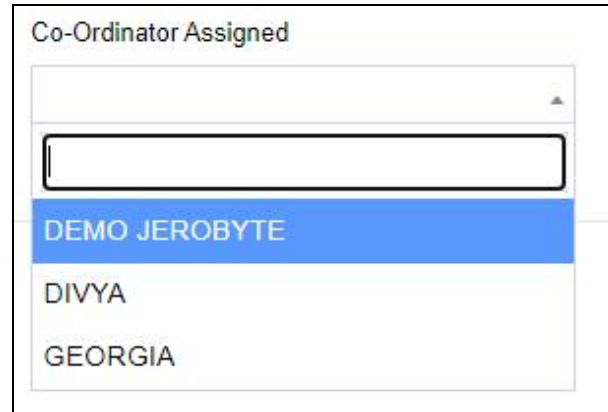


**Serial Number**

: Automatically uploaded ( if available)

**Co-Originator Assigned**

: The Name of the call Coordinator can be uploaded through Master. Any of the call coordinator name can be selected from Drop-down list as below.



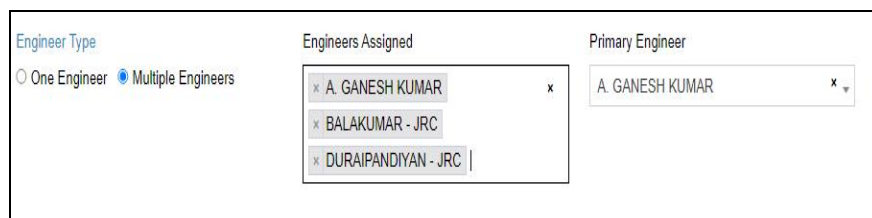
**Other Remarks**

: Remarks if any can be typed.

**Engineer Type**



\* If the service call is assigned to a Single Engineer select **One Engineer** and select the Engineer Assigned tab and **SUBMIT**



\* If the service call is assigned to a more than one Engineer select **Multiple Engineer** . Enter the Engineers name in the Engineer Assigned tab. If you want specify the Primary Engineer name select in the Primary Engineer and **SUBMIT**

**SMS Option**

If you want to send SMS after registering a complaint call you can select the below option and **SUBMIT** as in the Fig.30

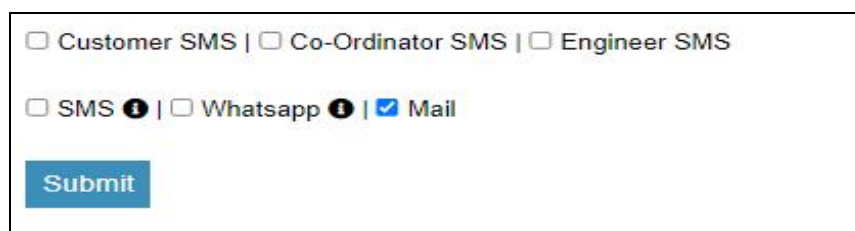
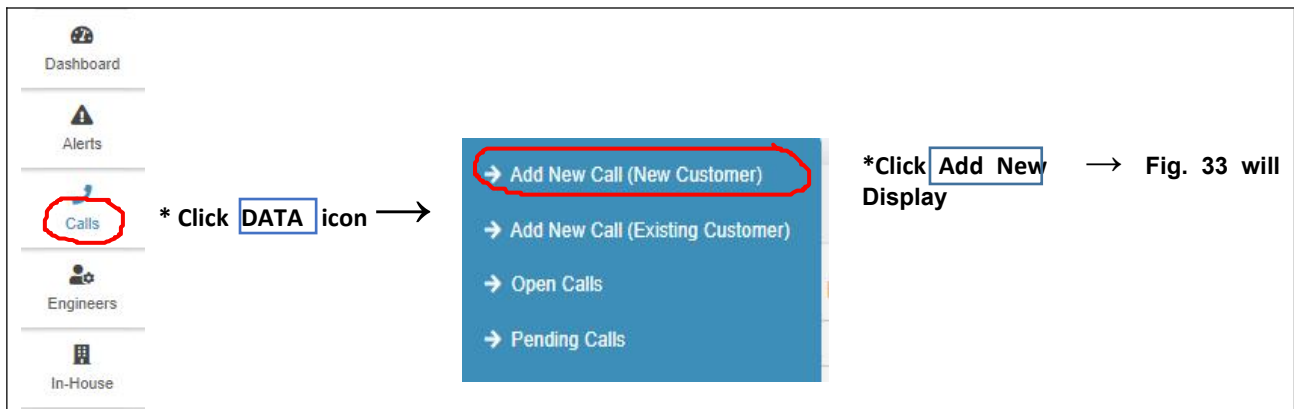
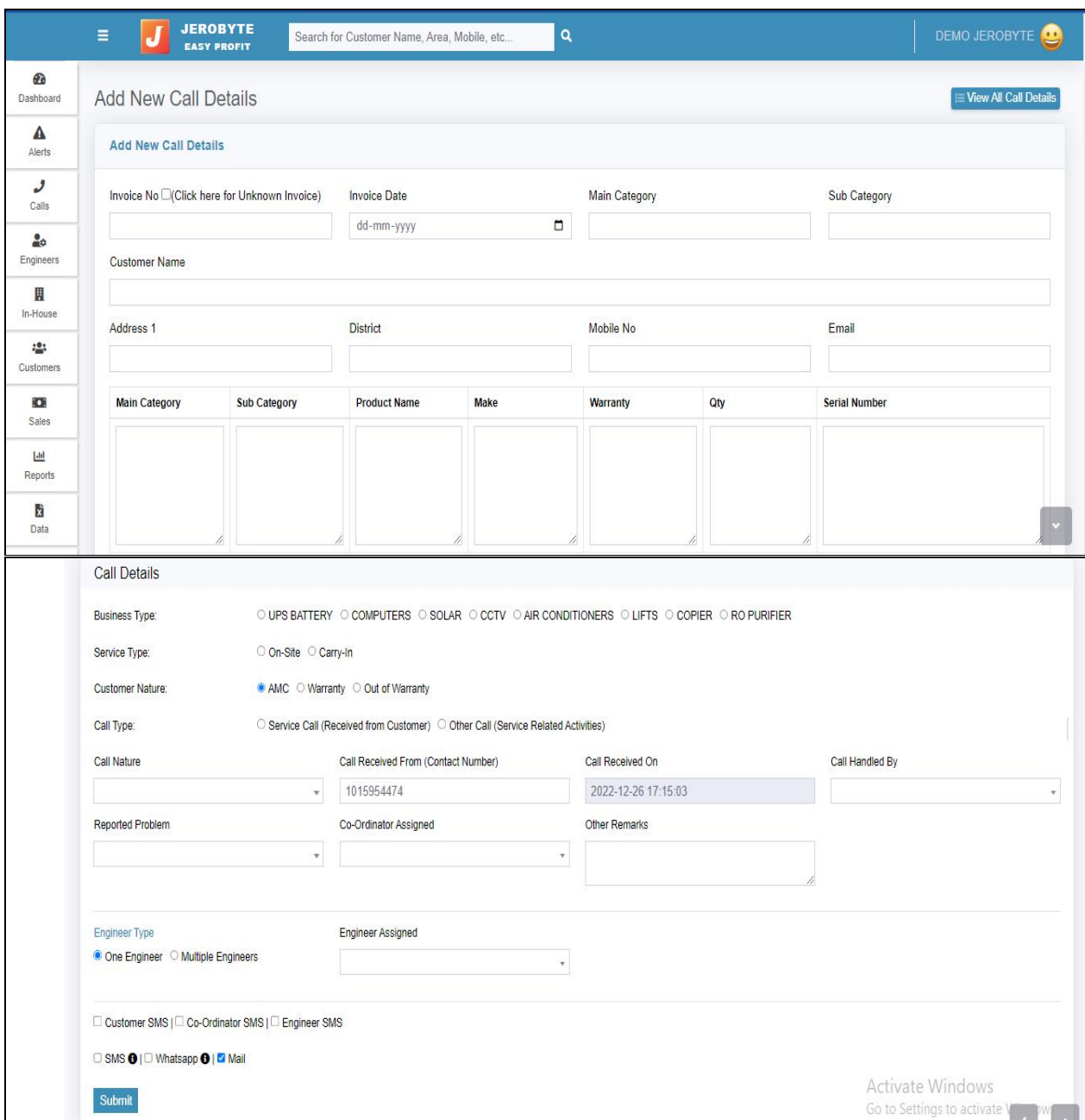


Fig.31

## 7. COMPLAINT REGISTRATION PROCEDURE - FOR NEW CUSTOMER



**Fig.32**



**JEROBYTE EASY PROFIT** Search for Customer Name, Area, Mobile, etc... DEMO JEROBYTE

Dashboard Alerts Calls Engineers In-House Customers Sales Reports Data

### Add New Call Details

[View All Call Details](#)

**Add New Call Details**

Invoice No  (Click here for Unknown Invoice) Invoice Date  dd-mm-yyyy Main Category  Sub Category

Customer Name

Address 1  District  Mobile No  Email

Main Category	Sub Category	Product Name	Make	Warranty	Qty	Serial Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Call Details**

Business Type: ☐ UPS BATTERY ☐ COMPUTERS ☐ SOLAR ☐ CCTV ☐ AIR CONDITIONERS ☐ LIFTS ☐ COPIER ☐ RO PURIFIER

Service Type: ☐ On-Site ☐ Carry-In

Customer Nature: ☒ AMC ☐ Warranty ☐ Out of Warranty

Call Type: ☐ Service Call (Received from Customer) ☐ Other Call (Service Related Activities)

Call Nature  Call Received From (Contact Number)  1015954474 Call Received On  2022-12-26 17:15:03 Call Handled By

Reported Problem  Co-Ordinator Assigned  Other Remarks

Engineer Type ☒ One Engineer ☐ Multiple Engineers Engineer Assigned

☐ Customer SMS ☐ Co-Ordinator SMS ☐ Engineer SMS

☐ SMS ☐ Whatsapp ☒ Mail

**Submit**

Activate Windows Go to Settings to activate Windows

**Fig.33**



Invoice No (Click here  
for Unknown Invoice)

: By clicking the check box provided an automatic  
reference Number or Invoice Number will appear.

Invoice Date

: To be filled manually.

Main Category

: Main Category means if you want to categories your customer like Banking ,  
Govt, End user, Hospitals etc., can be given.

Sub Category

: Sub Category means if you want to sub categories  
from Banking like IOB, SBI, PNB etc., can be given.

Customer Name,  
Address, District  
District, Mobile No,  
e mail

: To be filled manually.

Main Category

: Main Category means if you want to categories your Products like UPS, BATTERY,  
STABILIZER, COMPUTERS etc., can be given.

Sub Category

: Sub Category means if you want to sub categories  
from UPS like ONLINE, LIA, SOLAR etc., can be given.

Product Name

: 1 KVA Online UPS, 5 KW Solar UPS etc.,

Make

: Make of the Product to be filled Manually.

Warranty

: Product Warranty to be mentioned in Months.

Quantity

: Product Quantity to be mentioned in Numbers.

Serial Number

: Product Serial Number to be mentioned.

Business Type

: Will be automatically selected.

Service Type

: We need to choose whether Carry-in or Onsite  
**Carry-in means** - Products Given to Service centre.  
**Onsite means** - Attending Complaints at Customer site.

Customer Nature

: Will be automatically selected.

Call Type

: Need to be filled whether it is a **Service call ie.,** Complaint Calls or  
**Other call ie., Maintenance,** Installation, Delivery etc.,

Call Nature

: Call Natures can be uploaded through Master like Delivery, Installation, Complaint,  
Maintenance etc. Any of these activities can be selected from Drop-down list as  
below.



Call Nature

Complaint

DC Sign Work

Delivery

Installation

Maintenance

Re-Installation

**Call Received From  
(Contact Number)**

: Automatically uploaded ( if available)

**Call Received On**

: Will be automatically selected.

**Call Handled By**

: The Name of the call handlers can be uploaded through Master. Any of the call coordinator name can be selected from Drop-down list as below.

Call Handled By

DEMO JEROBYTE

DIVYA

GEORGIA

**Reported Problem**

: The Name of the Reported Problems can be uploaded through Master. Any of the Reported Problem can be selected from Drop-down list as below.

Reported Problem

AMC MAINTENANCE

AUTOMATIC ON / OFF

BATTERY FITTING WORK

BATTERY NOT CHARGING

BATTERY PROBLEM

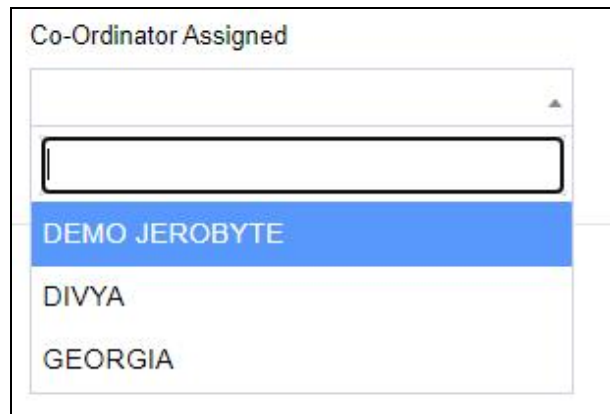
CHEQUE COLLECTION

**Serial Number**

: Automatically uploaded ( if available)

### Coordinator Assigned

: The Name of the call Coordinator can be uploaded through Master. Any of the call coordinator name can be selected from Drop-down list as below.



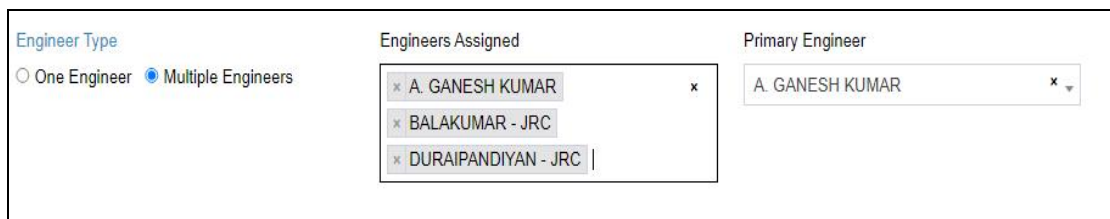
### Other Remarks

: Remarks if any can be typed.

### Engineer Type



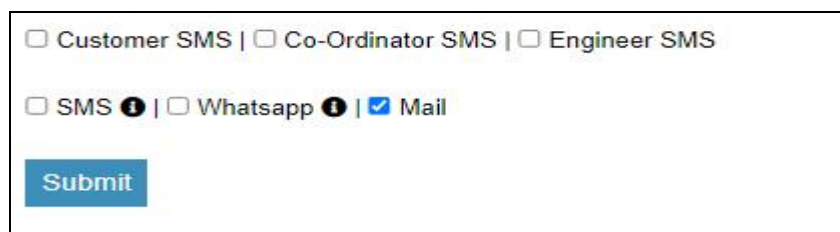
\* If the service call is assigned to a Single Engineer select **One Engineer** and select the Engineer Assigned tab and **SUBMIT**



\* If the service call is assigned to a more than one Engineer select **Multiple Engineer** . Enter the Engineers name in the Engineer Assigned tab. If you want specify the Primary Engineer name select in the Primary Engineer and **SUBMIT**.

### SMS Option

If you want to send SMS after registering a complaint call you can select the below option and **SUBMIT** as in the Fig.34



**Fig.34**

## 8. DASH BOARD MANAGEMENT

### DASH BOARD - CALL STATUS

\* The Registered Complaint will be added in Received Calls as mentioned below **FIG.35**



**Fig.35**

**Received Calls** : Will display the count of Complaint registered on Day Basis.

**Open Calls** : Will display the count of unattended Registered Complaint as on Date.

**Pending Calls** : Will display the count of Pending calls as on Date.

**Completed Calls** : Will display the count of Completed calls as on Date.

### DASH BOARD - AMC & WARRANTY

\* The warranty and AMC Customers will be added in AMC & Warranty Dashboard as mentioned below **FIG.36**



**Fig.36**

**AMC Customers** : Will display the count of the AMC Converted Customers.

**Warranty Customers** : Will display the count of the Warranty Customers.

## DASH BOARD - BUSINESS ALERTS

\* The AMC & Warranty Preventive Maintenance, AMC & Warranty Expiry will be added in Business Alerts as mentioned below **FIG.37**



**Fig.37**

<b>AMC Maintenance</b>	: Will display the list of AMC maintenance to be done for the products as on Date.
<b>AMC Expiry</b>	: Will display the list of AMC going to Expire product as on Date.
<b>Warranty Maintenance</b>	: Will display the list of warranty maintenance to be done for the products as on Date.
<b>Warranty Expiry</b>	: Will display the list of warranty going to Expire product as on Date.

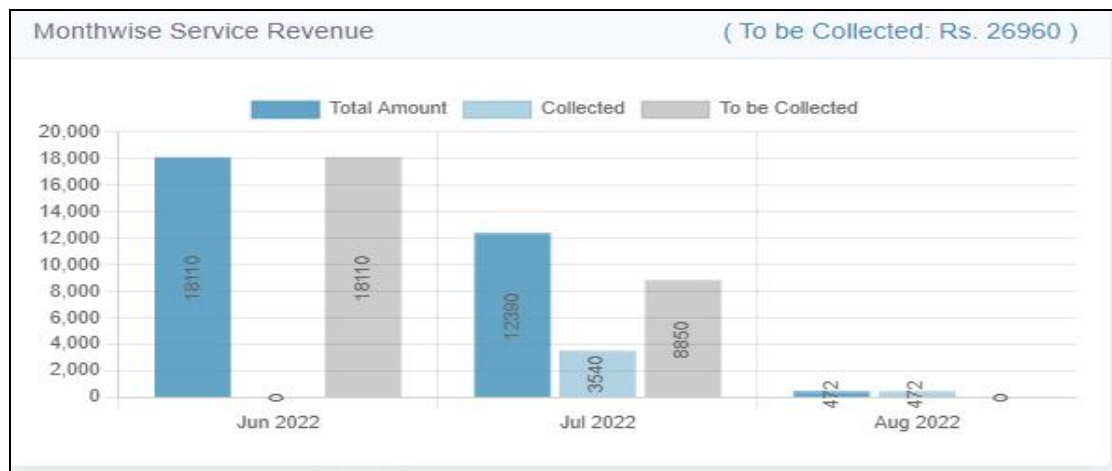
## DASH BOARD - SERVICE REVENUE

\* Day wise revenue raised from service / AMC and cumulative revenue raised for any duration as follows in **Fig.38**.



**Fig.38**

\* Monthly wise Revenue raised, Revenue Collected and Revenue to be collected from service / AMC as follows in **Fig.39**



**Fig.39**

#### DASH BOARD - REMAINDER

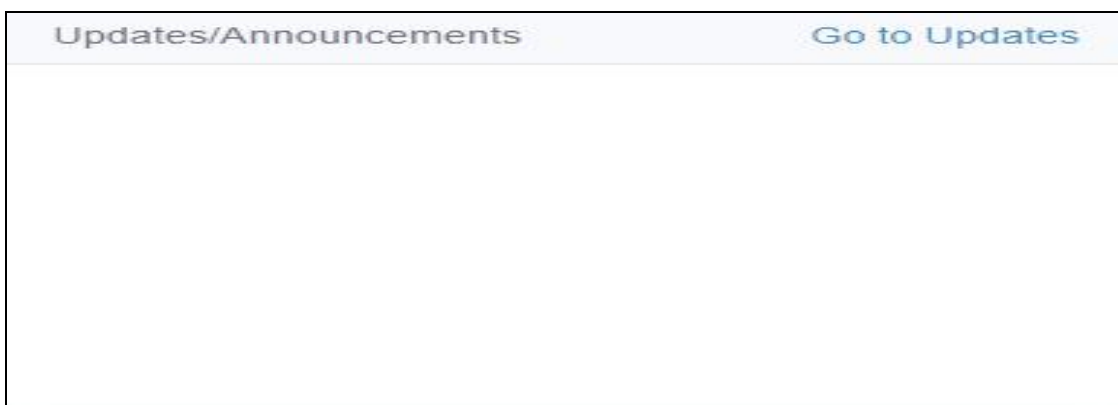
\* Scrolling Remainder to raise the Invoice for Completed Service / AMC & Maintenance as follows in **Fig.40**



**Fig.40**

#### DASH BOARD - UPDATES & ANNOUNCEMENT

\* Any updates and announcement to the Employees will be displayed as follows in **Fig.41**



**Fig.41**

## DASH BOARD - ENGINEERS CALLS

\* Day wise assigned calls to the individual Engineer will be displayed as follows in **Fig.42**

Engineers Calls	
A. GANESH KUMAR	0
BALAKUMAR - JRC	7
DURAIPANDIYAN - JRC	2
ELLANGO (OUT SOURCE)	0
GEORGE A	0

**Fig.42**

## 9. ENGINEER MANAGEMENT

### FIELD ENGINEER TO LOGIN PROCESS

\* Type URL: (As Allotted to you)

Ex: <https://jerobyte.com/test/>

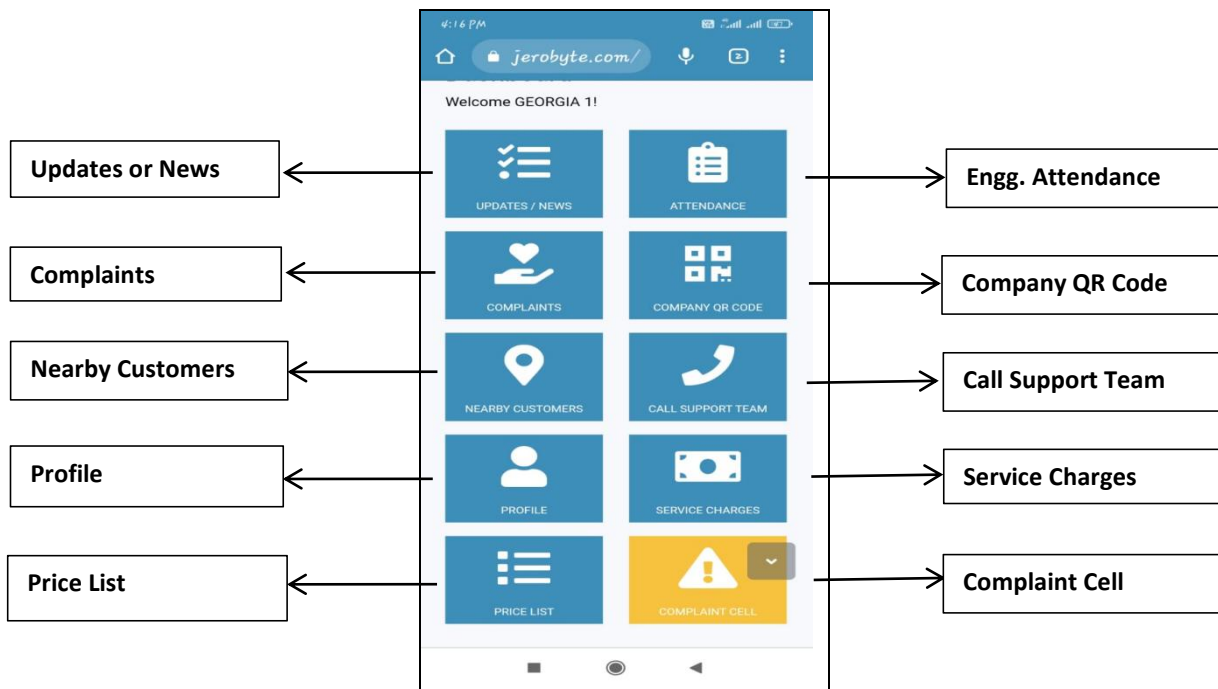
\* Jerobyte window will open as follows.



\* Type user name : [jexxxx@jexxxx.com](mailto:jexxxx@jexxxx.com)

Password : Test@2022

\* Dashboard will open as follows.



**Engineers Dashboard - Fig.43**

Updates or News – Specific updates for the Engineers will display

Complaints – Shows all calls Details ( Open, Pending, Completed and Total)

Nearby Customers - Shows the Nearby Customers to the present Location.

Profile – To updates Engineers Profile.

Price List – The product price list for Quotation.

Attendance – To Register Attendance daily. The End of day Engineers should close their attendance compulsory

QR Code – QR Code to do Payment through UPI.(Under Construction)

Call Support – To make a call to the Admin.

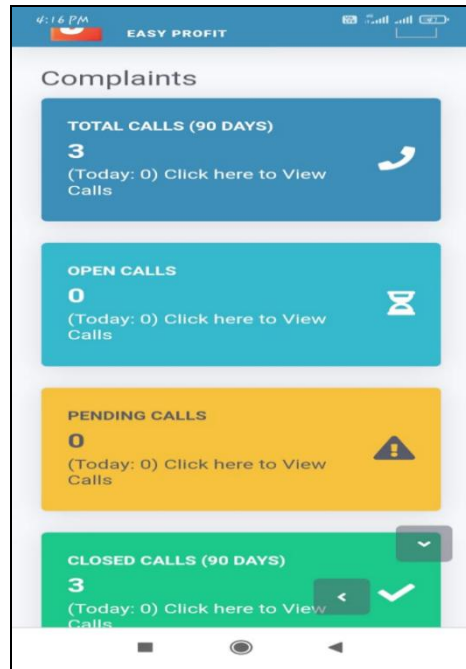
Service Charge – List the service charges raised by Engineers.

Complaint Cell – Escalation to Management if any. ( Under Construction)



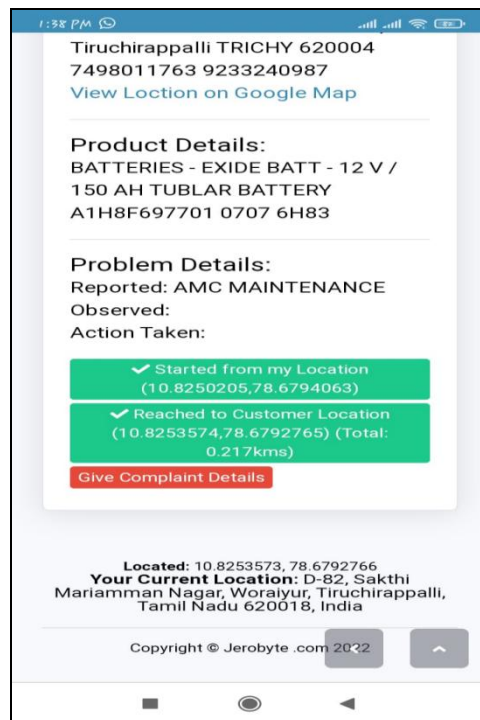
## ENGINEERS ACTIVITY - CALL HANDLING

- \* The Assigned Complaints will be displayed in the Complaint tab.
- \* Click **Complaint tab** then the following **Fig.44** will be displayed.



**Fig.44**

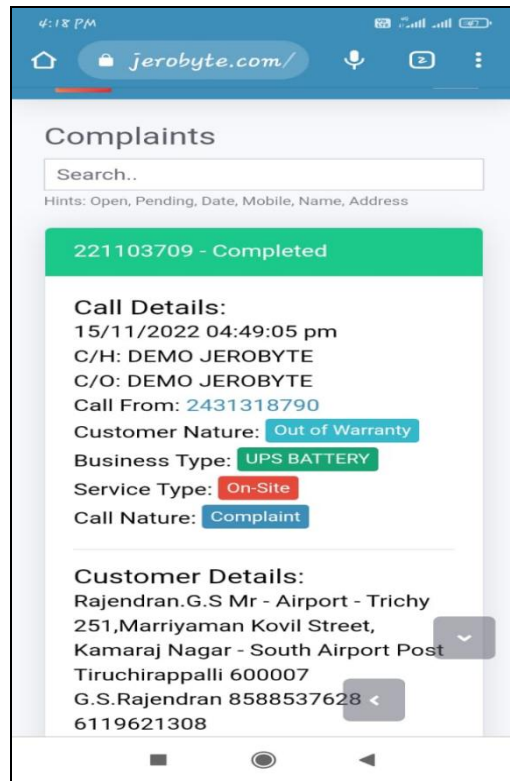
- \* Click **Open calls** then the following **Fig.45** will be displayed.



**Fig.45**

- \* Press **Give an Acknowledgement** to accept the call from Coordinator.
- \* Press **Start from My Location** Before Proceeding to the location

- \* Press **Reached to Customer Location** After reaching the location
- \* Press **Give Complaint Details** Then the following **Fig.46** will be displayed.



**Fig.46**

- \* The following details will be displayed as in **Fig.47**
- \* Fill all relevant information based on your service, upload the image and give **SUBMIT**

1

Service Report No

Work Nature

Problem Observed

Product Name

Make

Capacity / DC V

MFG Code

Battery Make

Battery AH

No. of Battery

No. of Set

Site Verification

Ventilation ☐ Yes ☒ Partial ☐ No

Direct Sunlight ☐ Yes ☒ Partial ☐ No

Wiring Ready ☐ Yes ☒ No

Modification on Wiring / Load ☐ Yes ☒ No

Rain/Cleaning Water Dripping ☐ Yes ☒ No

2

AC Data

Phase Type

Stabilizer ☐ Yes ☒ No

Phase Reverse ☐ Yes ☒ No

Earthing ☐ Yes ☒ No

Overload ☐ Yes ☒ No

DC Data

	V	A
@ Charging	<input type="text" value="99"/>	<input type="text" value="0"/>
@ Discharging with Load	<input type="text" value="0"/>	<input type="text" value="0"/>
@ Discharging without Load	<input type="text" value="0"/>	<input type="text" value="0"/>

Battery Condition

Week CONDITION

Spares Used

1	<input type="text" value="Select"/>	<input type="text"/>
2	<input type="text" value="Select"/>	<input type="text"/>
3	<input type="text" value="Select"/>	<input type="text"/>

3

Call Status

Action Taken

GST No

Email ID

Charges

Invoice No.

Invoice Date

GST Type ☐ Included GST ☒ Excluded GST ☐ Estimation

Service Charges

Material Charges

Total

GST

Total Amount

4

Site Images (After Action Taken)

Drag & Drop Files

Customer's Feedback

Engineer's Approach

Signatory's Name

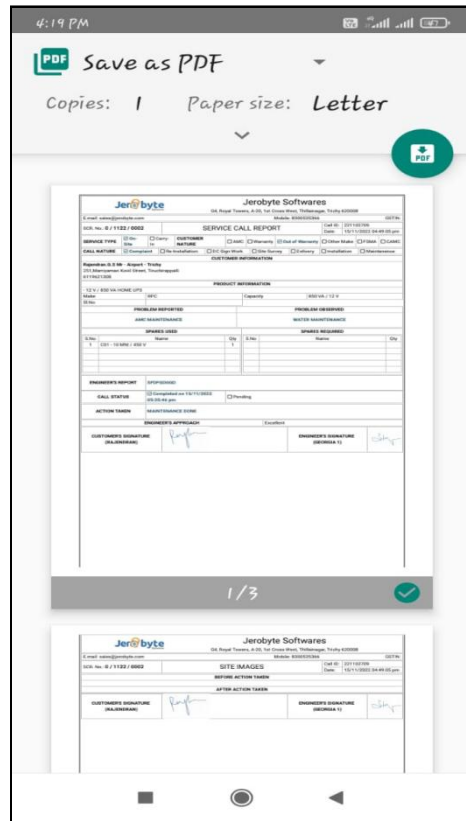
Signature

Customer Seal

Fig.47

\* After submission of service report from Engineer the same will be sent to the Admin / Coordinator automatically for approval.

\* After approval from the Admin / Coordinator the service completion report may be generated by the Engineer at site. The report may be Saved or Printed and send to the customer as in **Fig.48**



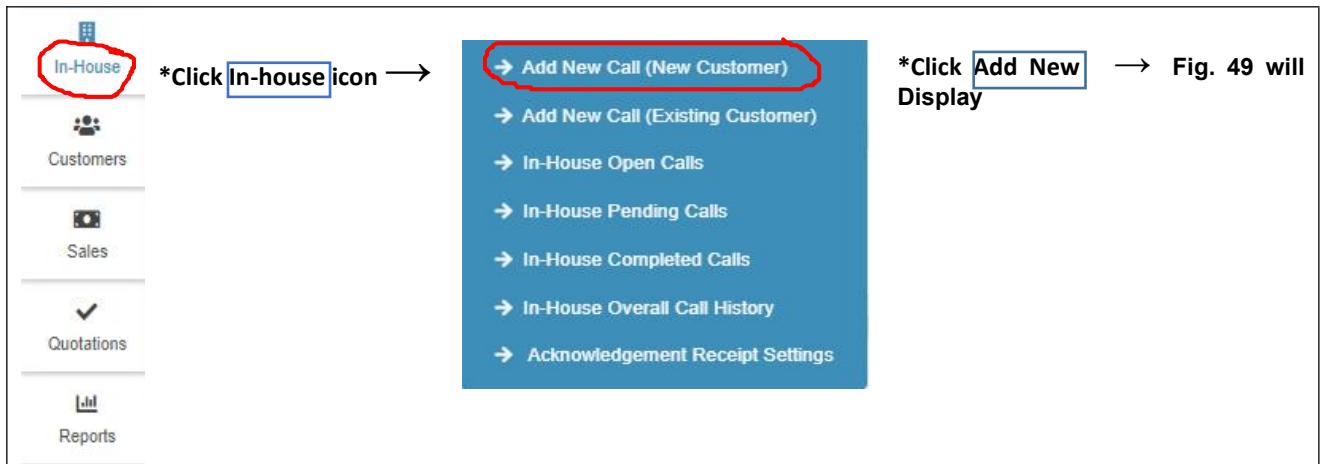
**Fig.48**

**Note:** The same approval procedure is applicable for Completed calls or Pending Calls.

## 10. IN-HOUSE MANAGEMENT

### CALL REGISTRATION PROCEDURE

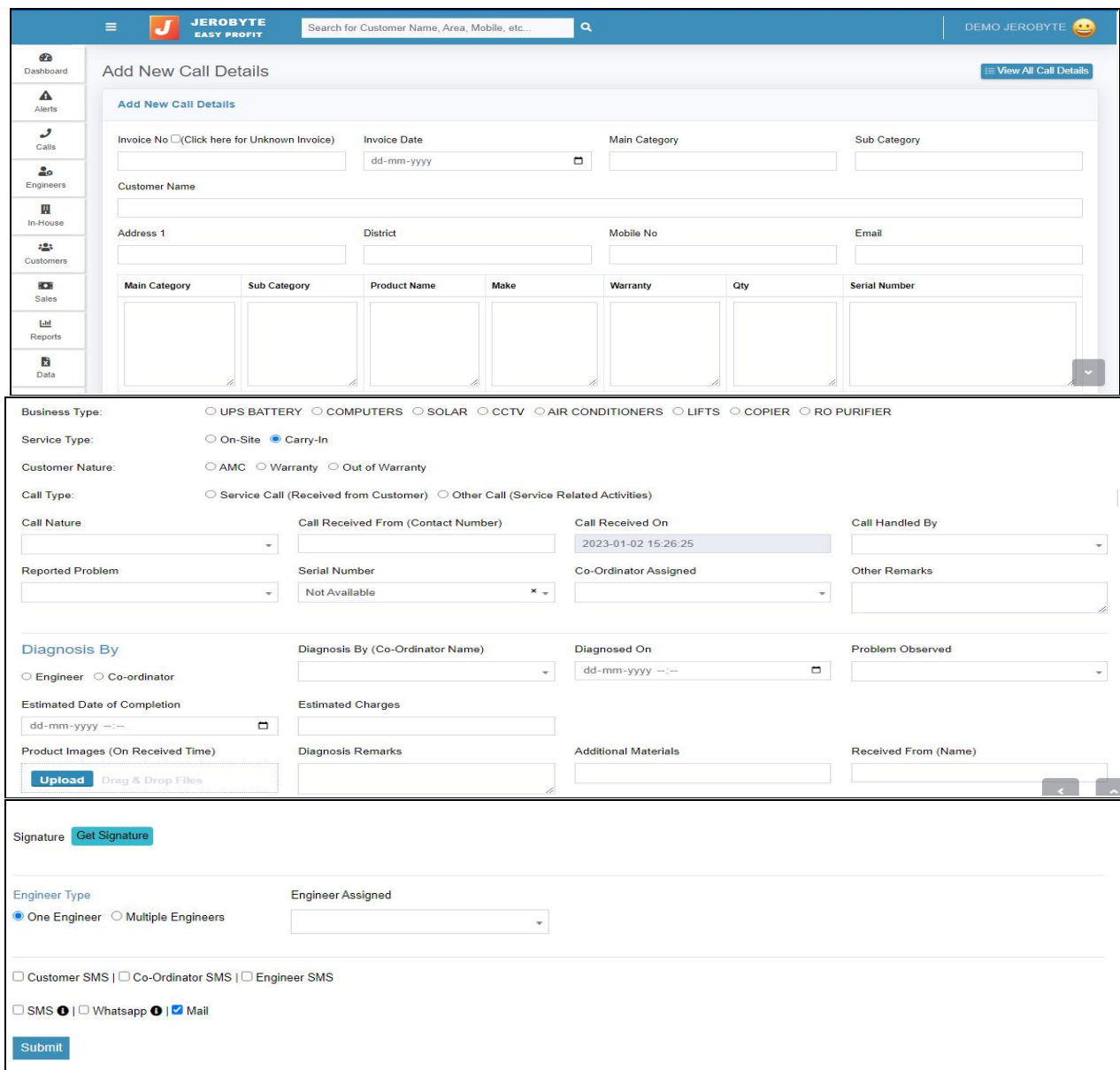
When the product is Given to the Service Centre by Customer the creation of Product Receipt Acknowledgement, Estimation Charges and OEM Support followup etc.,



The screenshot shows the 'In-House' menu on the left sidebar, which is circled in red. To its right, a blue dropdown menu is displayed, also with the 'Add New Call (New Customer)' option circled in red. The dropdown menu includes the following options: 'Add New Call (New Customer)', 'Add New Call (Existing Customer)', 'In-House Open Calls', 'In-House Pending Calls', 'In-House Completed Calls', 'In-House Overall Call History', and 'Acknowledgement Receipt Settings'. To the right of the dropdown, text indicates that clicking 'Add New' will display Fig. 49.

\*Click **In-house** icon →

\*Click **Add New** → Fig. 49 will Display



The screenshot displays the 'Add New Call Details' form in the JEROBYTE EASY PROFIT system. The form is divided into several sections for data entry:

- Header:** Includes a search bar for Customer Name, Area, Mobile, etc., and a 'View All Call Details' link.
- Form Fields:**
  - Invoice No (with a link for unknown invoices), Invoice Date (dd-mm-yyyy), Main Category, and Sub Category.
  - Customer Name, Address 1, District, Mobile No, and Email.
  - A table for product details with columns: Main Category, Sub Category, Product Name, Make, Warranty, Qty, and Serial Number.
- Service Details:**
  - Business Type: ☐ UPS BATTERY ☐ COMPUTERS ☐ SOLAR ☐ CCTV ☐ AIR CONDITIONERS ☐ LIFTS ☐ COPIER ☐ RO PURIFIER
  - Service Type: ☐ On-Site ☒ Carry-In
  - Customer Nature: ☐ AMC ☐ Warranty ☐ Out of Warranty
  - Call Type: ☐ Service Call (Received from Customer) ☐ Other Call (Service Related Activities)
- Call Information:**
  - Call Nature (dropdown), Call Received From (Contact Number), Call Received On (2023-01-02 15:26:25), and Call Handled By (dropdown).
  - Reported Problem (dropdown), Serial Number (Not Available), Co-Ordinator Assigned (dropdown), and Other Remarks (text area).
- Diagnosis:**
  - Diagnosis By (radio buttons for Engineer or Co-ordinator), Diagnosis By (Co-Ordinator Name) (dropdown), Diagnosed On (dd-mm-yyyy), and Problem Observed (dropdown).
  - Estimated Date of Completion (dd-mm-yyyy), Estimated Charges (text field), and Product Images (On Received Time) (upload button).
  - Diagnosis Remarks (text area), Additional Materials (text field), and Received From (Name) (text field).
- Signature and Assignment:**
  - Signature (Get Signature button).
  - Engineer Type (radio buttons for One Engineer or Multiple Engineers) and Engineer Assigned (dropdown).
  - Customer SMS, Co-Ordinator SMS, and Engineer SMS checkboxes.
  - SMS, Whatsapp, and Mail checkboxes.
  - Submit button.

Fig.49

Invoice No (Click here  
for Unknown Invoice)

: By clicking the check box provided an automatic  
reference Number or Invoice Number will appear.

Invoice Date

: To be filled manually.

Main Category

: Main Category means if you want to categories your customer like Banking,  
Govt, End user, Hospitals etc., can be given.

Sub Category

: Sub Category means if you want to sub categories  
from Banking like IOB, SBI, PNB etc., can be given.

Customer Name,  
Address, District  
District, Mobile No,  
e mail

: To be filled manually.

Main Category

: Main Category means if you want to categories your Products like UPS,  
BATTERY, STABILIZER, COMPUTERS etc., can be given.

Sub Category

: Sub Category means if you want to sub categories  
from UPS like ONLINE, LIA, SOLAR etc., can be given.

Product Name

: 1 KVA Online UPS, 5 KW Solar UPS etc.,

Make

: Make of the Product to be filled Manually.

Warranty

: Product Warranty to be mentioned in Months.

Quantity

: Product Quantity to be mentioned in Numbers.

Serial Number

: Product Serial Number to be mentioned.

Business Type

: Will be automatically selected.

Service Type

: We need to choose whether Carry-in or Onsite  
**Carry-in means** - Products Given to Service centre.  
**Onsite means** - Attending Complaints at Customer site.

Customer Nature

: Will be automatically selected.

Call Type

: Need to be filled whether it is a **Service call ie.,** Complaint Calls or  
**Other call ie., Maintenance,** Installation, Delivery etc.,

Call Nature

: Call Natures can be uploaded through Master like Delivery, Installation, Complaint,  
Maintenance etc. Any of these activities can be selected from Drop-down list as  
below.

Call Nature

Complaint

DC Sign Work

Delivery

Installation

Maintenance

Re-Installation

**Call Received From  
(Contact Number)**

: Automatically uploaded ( if available)

**Call Received On**

: Will be automatically selected.

**Call Handled By**

: The Name of the call handlers can be uploaded through Master. Any of the call coordinator name can be selected from Drop-down list as below.

Call Handled By

DEMO JEROBYTE

DIVYA

GEORGIA

**Reported Problem**

: The Name of the Reported Problems can be uploaded through Master. Any of the Reported Problem can be selected from Drop-down list as below.

Reported Problem

AMC MAINTENANCE

AUTOMATIC ON / OFF

BATTERY FITTING WORK

BATTERY NOT CHARGING

BATTERY PROBLEM

CHEQUE COLLECTION

**Serial Number**

: Automatically uploaded ( if available)

**Coordinator Assigned**

: The Name of the call Coordinator can be uploaded through Master. Any of the call coordinator name can be selected from Drop-down list as below.



Co-Ordinator Assigned

DEMO JEROBYTE  
DIVYA  
GEORGIA

#### Other Remarks

: Remarks if any can be typed.

#### Diagnosis By

\* Select whether the Diagnosed person is Engineer or Coordinator and fill all relevant details as required.

#### Engineer Type

Engineer Type

☒ One Engineer
 ☐ Multiple Engineers

Engineer Assigned

\* If the service call is assigned to a Single Engineer select **One Engineer** and select the Engineer Assigned tab and **SUBMIT**

Engineer Type

☐ One Engineer
 ☒ Multiple Engineers

Engineers Assigned

☒ A. GANESH KUMAR x  
☒ BALAKUMAR - JRC  
☒ DURAI PANDIYAN - JRC

Primary Engineer

☒ A. GANESH KUMAR x

\* If the service call is assigned to a more than one Engineer select **Multiple Engineer** . Enter the Engineers name in the Engineer Assigned tab. If you want specify the Primary Engineer name select in the Primary Engineer and

**SUBMIT.**

#### SMS Option

If you want to send SMS after registering a complaint you can select the below option for **SUBMIT** as in the Fig.50

☐ Customer SMS | 
 ☐ Co-Ordinator SMS | 
 ☐ Engineer SMS

☐ SMS ⓘ | 
 ☐ Whatsapp ⓘ | 
 ☒ Mail

Submit

**Fig.50**

\* After registration of complaints, the registered complaint will be displayed in **Open calls** in the Dashboard.

## PRODUCT ACKNOWLEDGEMENT / DELIVERY CHALLAN

\* On Receipt of the product for service an receipt acknowledgement to customer and Delivery Challan preparation for OEM and related Tracking.

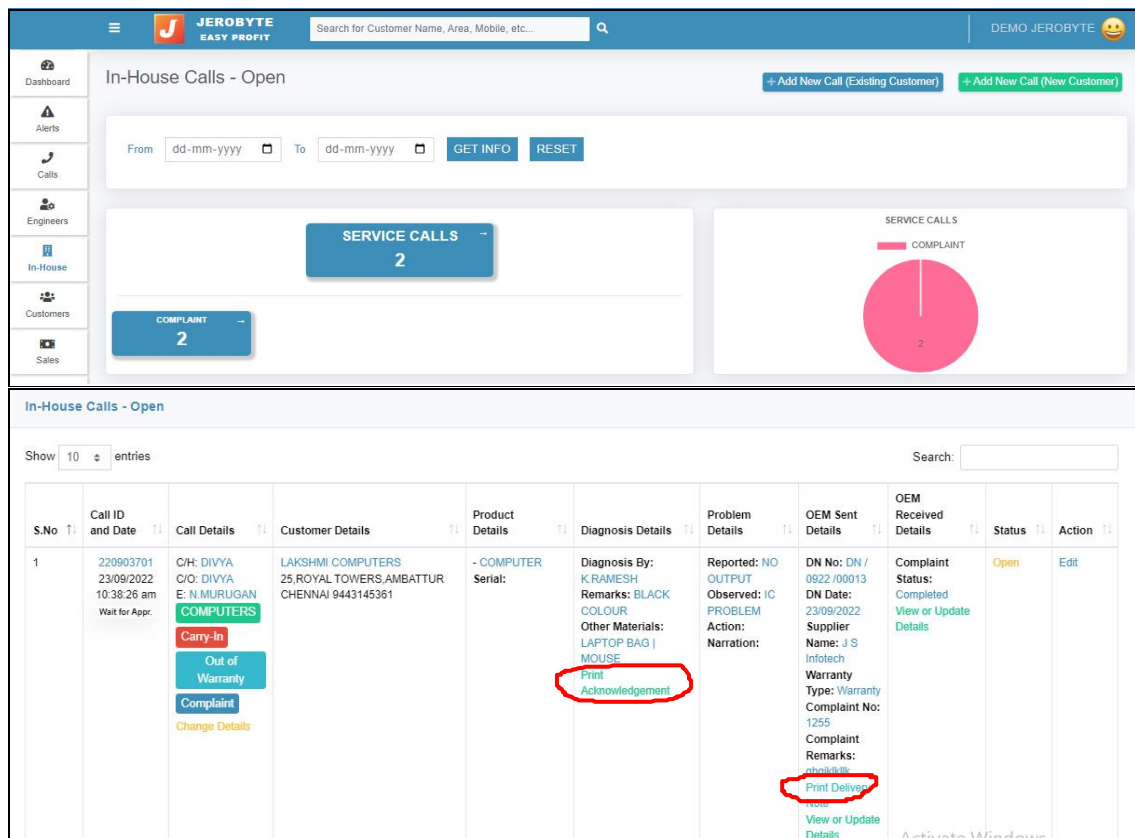
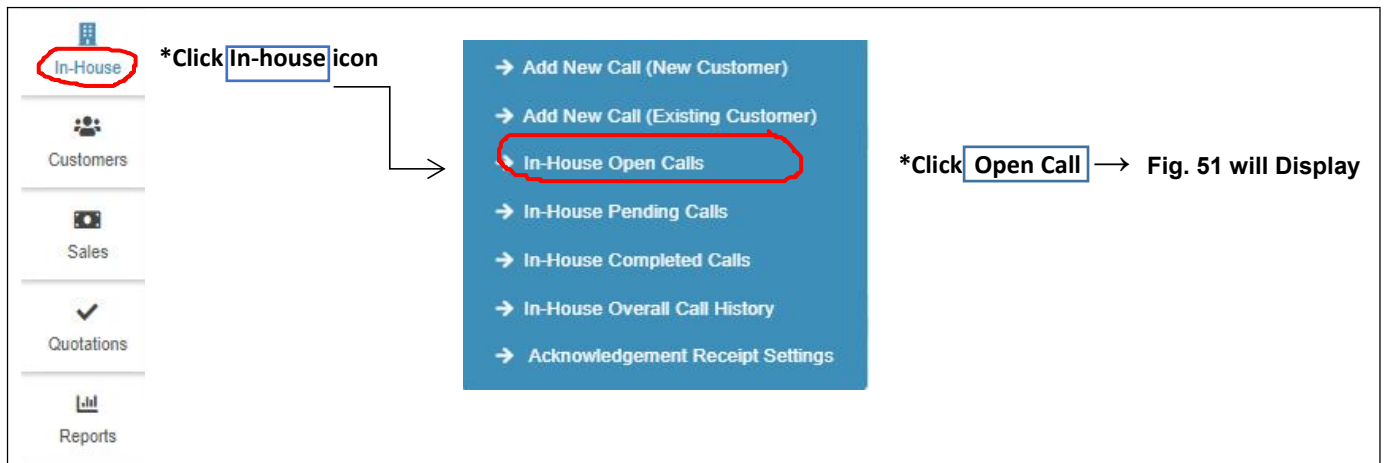


Fig.51

\* To Create Product Receipt Acknowledgement to Customer.

\* Click **Print acknowledgement** under Diagnosis details tab as in the following Fig.52

1003, 11:04 AM Jerobyte Software Pvt. Ltd. Carry-In Acknowledgement - 12882501

**Jerobyte Software**  
G4, Royal Towers, A-20, 1st Cross Vilela, Thiruvananthapuram, Trichy 620008  
E-mail: sales@jerobyte.com Mobile: 8300535366 GSTIN:

Call ID: 220903701 Date: 23/09/2022 10:38:26 am

**CARRY-IN ACKNOWLEDGEMENT**

SERVICE TYPE: ☐ On-Site ☒ Carry-In CUSTOMER NATURE: ☐ AMC ☐ Warranty ☒ Out of Warranty  
CALL NATURE: ☒ Complaint ☐ Re-Installation ☐ OC Sign Work ☐ Site Survey ☐ Delivery ☐ Installation ☐ Maintenance

CUSTOMER INFORMATION

LAKEVIEW COMPUTERS  
25, ROYAL TOWERS, AMBATUR CHENNAI  
9443145361

PRODUCT INFORMATION

- COMPUTER  
SL No:

PROBLEM REPORTED: NO OUTPUT PROBLEM OBSERVED: IC PROBLEM

DIAGNOSIS INFORMATION

Diagnosis By: K. RAJESH  
Diagnosis On: 23/09/2022  
Remarks: BLACK COLOUR

ESTIMATION

Estimate Charge: Rs. 0  
0

PRODUCT IMAGES

ADDITIONAL MATERIALS: LAPTOP BAG | MOUSE

CUSTOMER'S SIGNATURE (SARU/ANAN)

RECEIVER'S SIGNATURE (DEVYA) *Deva*

Fig.52

- \* To raise Delivery Challan to OEM to send the defective parts.
- \* Click **Print Delivery Note** under **OEM Sent Details**. The Delivery Note will be created as follows **Fig.53**

1003, 11:04 AM Jerobyte Software Pvt. Ltd. Carry-In Acknowledgement - 12882501

**Jerobyte Software**  
G4, Royal Towers, A-20, 1st Cross Vilela, Thiruvananthapuram, Trichy 620008  
E-mail: sales@jerobyte.com Mobile: 8300535366 GSTIN:

**DELIVERY NOTE**

DN No.: DN / 0922 / 00013 Call ID: 220903701  
DN Date: 23/09/2022 Date: 23/09/2022 10:38:26 am

TO:

J S Info Tech  
9746505012  
State Code:  
GSTIN:

S.NO	DESCRIPTION OF GOODS	HSN/SAC	QTY
1	COMPUTER For Replacement/Repair	8507	1.000 Nos
Total			1.000 Nos
HSN/SAC			Taxable Value
8507			0
Total			0
Tax Amount Inwards INR: NIL			
Remarks: gghghgh			
Company's PAN:			
Received in Good Condition			
For Jerobyte Software			AUTHORIZED SIGNATORY
SUBJECT TO TRICHY JURISDICTION This is a Computer Generated Document			

Fig.53

## PRODUCT TRACKING DETAILS WITH OEM

\* Fill all relevant details and upload Image if any in the below menu **Fig.54** and click **Submit**.

OEM Sent Details

DN No

DN / 0123 /00014

DN Date

2023-01-04

Supplier Name

UTL

Supplier Warranty Type

Warranty

Complaint No

1244

Product Remarks

claim purpose for new battery Battery - 4

Estimated Cost

Estimated Delivery

04-01-2023

Send To OEM

Courier Date

04-01-2023

Courier Pay Type

To Pay

Courier Charges

100

Courier Remarks

Upload

Drag & Drop Files

Taxable Value

0

Delete

Submit

**Fig.54**

## PRODUCT RECEIVED FROM OEM RECEIVED DETAILS

\* Fill in all relevant details about OEM and upload an image if any. As in **Fig.55** and click **Submit**.

Received from OEM

Courier Date

24-09-2022

Courier Pay Type

Paid

Courier Charges

100

Courier Remarks

Upload

Drag & Drop Files

Product Service Status

Completed

Delete

Submit

**Fig.55**

## 11. CUSTOMER MANAGEMENT

\* **Location details** of all the Customers can be viewed in Google Map by clicking the Customer location option as in **Fig.56**

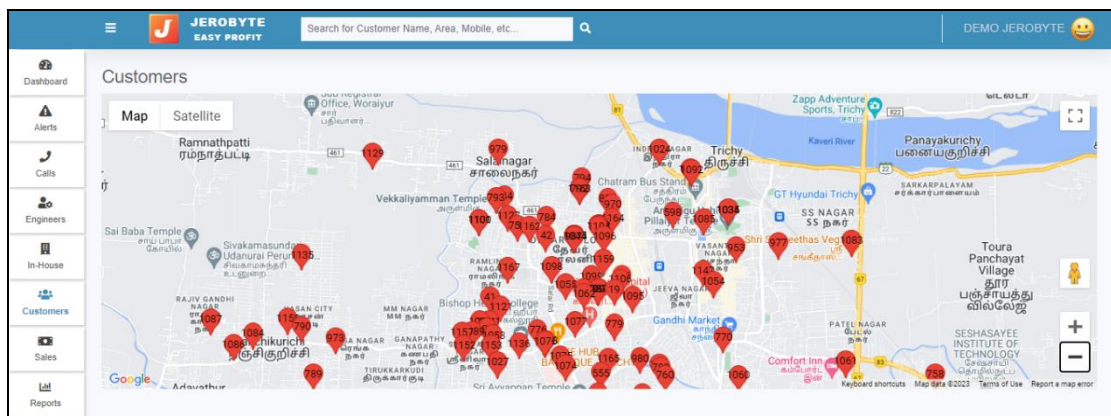
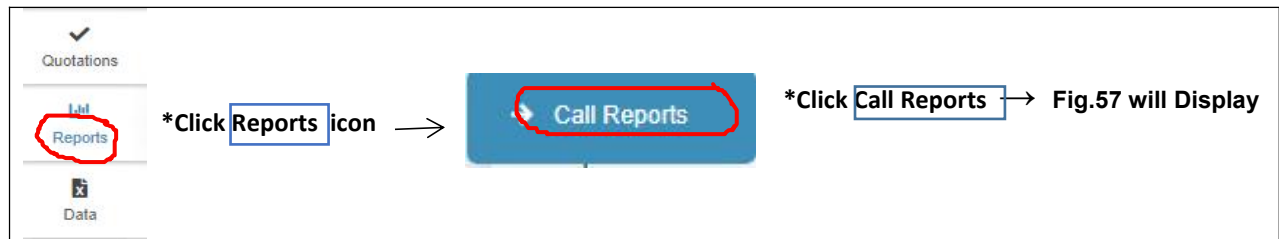
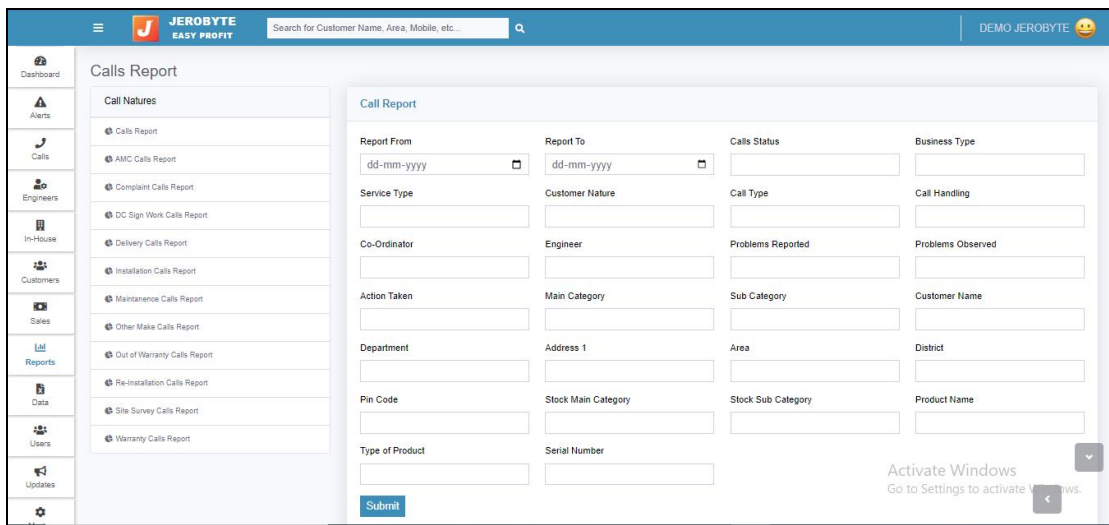


Fig.56

## REPORT MANAGEMENT

### ANALYTICAL REPORTS

The screenshot shows the 'Calls Report' form in the JEROBYTE EASY PROFIT application. The form is divided into several sections for data entry:

- Report From:** A date field with a calendar icon, set to 'dd-mm-yyyy'.
- Report To:** A date field with a calendar icon, set to 'dd-mm-yyyy'.
- Service Type:** A dropdown menu.
- Customer Nature:** A dropdown menu.
- Co-Ordinator:** A text input field.
- Engineer:** A dropdown menu.
- Action Taken:** A text input field.
- Main Category:** A dropdown menu.
- Department:** A text input field.
- Address 1:** A text input field.
- Pin Code:** A text input field.
- Stock Main Category:** A dropdown menu.
- Type of Product:** A dropdown menu.
- Serial Number:** A text input field.
- Calls Status:** A dropdown menu.
- Business Type:** A dropdown menu.
- Call Type:** A dropdown menu.
- Problems Reported:** A text input field.
- Problems Observed:** A text input field.
- Sub Category:** A dropdown menu.
- Customer Name:** A text input field.
- Area:** A text input field.
- District:** A text input field.
- Stock Sub Category:** A dropdown menu.
- Product Name:** A text input field.

A 'Submit' button is located at the bottom left of the form. A watermark 'Activate Windows Go to Settings to activate Windows.' is visible in the bottom right corner.

**Fig.57**

\* From the above menu we can select the field as in fig 54 and generate Reports. Samples as follows. The report of any Combination available data mentioned in the above menu can be taken.

- \* Call Reports
- \* Complaint Call Report
- \* Installation Call Report
- \* Warranty Call Report
- \* AMC Call Report
- \* Delivery Call Report
- \* Maintenance Call Report
- \* Site survey Report

## SAMPLE REPORT SELECTION FORMAT

**Call Report**

Report From 01-12-2022	Report To 29-12-2022	Calls Status x Pending x	Business Type x COMPUTERS x
Service Type x On-Site x	Customer Nature x Warranty x	Call Type x Service Call x	Call Handling x DEMO JEROBYTE x
Co-Ordinator 	Engineer x GEORGIA 1 x	Problems Reported x AMC MAINTENANCE x	Problems Observed x AMC MAINTENANCE x
Action Taken x MAINTENANCE DONE   x	Main Category 	Sub Category 	Customer Name 
Department 	Address 1 	Area 	District 
Pin Code 	Stock Main Category 	Stock Sub Category 	Product Name 
Type of Product 	Serial Number 		

Submit

Activate Windows  
Go to Settings to activate Windows.

Fig.58

## SAMPLE GENERATED REPORT

PDF Excel

Search:

S.No	Call ID	Date	Call Details	Customer Details	Product Details	Serial Number	Problem Reported	Problem Observed	Action Taken	Narrat
1	221209576	21/12/2022 09:47:41 am	C/H: JRC C/O: JRC E: K RAMESH UPS BATTERY On-Site Out of Warranty Complaint	AMC - Madurai Medical College Hospital Madurai Medical College Hospital Madurai 625020 7010602164	UPS - ONLINE UPS WITHOUT BATTERY - ONLINE UPS - 20 KVA Online UPS with 240 Minutes Backup SMF Battery	UT - 340251408	UPS NOT WORKING			

Showing 1 to 1 of 1 entries

Print Service Call Reports

Activate Windows  
Go to Settings to activate Windows.

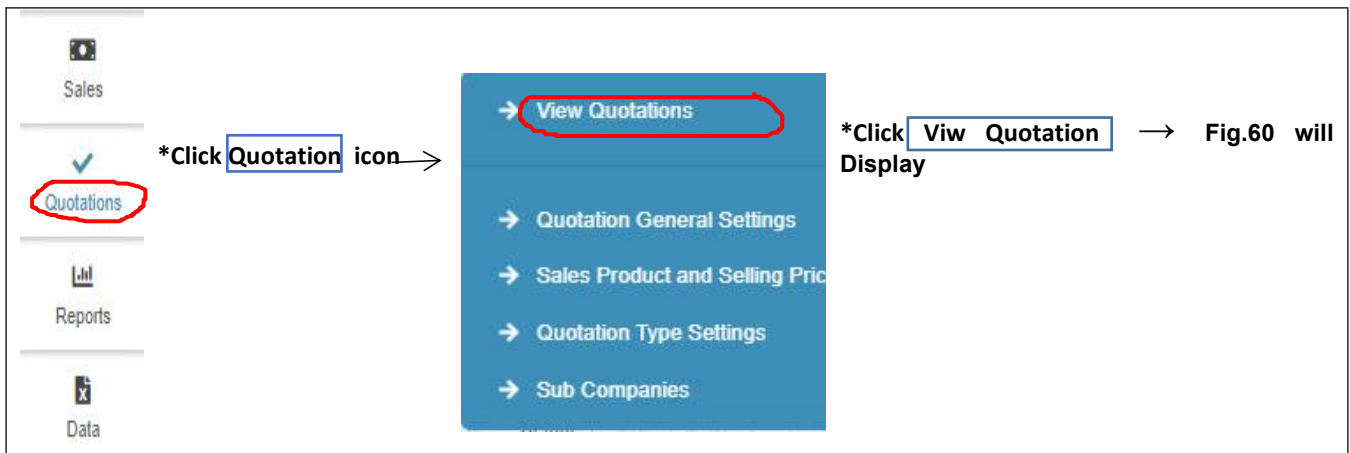
Fig.59

\* The Generated reports may be **Printed or Exported** in the form of **PDF / Excel**.



## 12. QUOTATION MANAGEMENT

\* Simplified Quotation preparation for new Business or Replacement business by few simple steps from the Customer location itself.



### VIEW QUOTATION

Quotations

Total  
Quotations  
1

Pending  
Quotations  
1

Converted  
Quotations  
0

Show 10 entries

Search:

S.No	Age	Quotation No	Quotation Date	Given By	Customer Details	Product Total	Scrap Total	Net Total	Status	Convert to Sales Order	View / Print	SC 1	SC 2	SC 3
1	56	/ QN / 1122 / 00001	11/11/2022	BALAKUMAR - JRC	BHEL Employees Cooperative Bank Ltd - Kailasapuram 1 - Trichy B Sector, BHEL Township, Kailasapuram TRICHY 620014 043125579092573834 9843257275	129986.56	15600.00	114386.56	Open	Click to Convert	View / Print	View / Print	View / Print	View / Print

Showing 1 to 1 of 1 entries

Previous

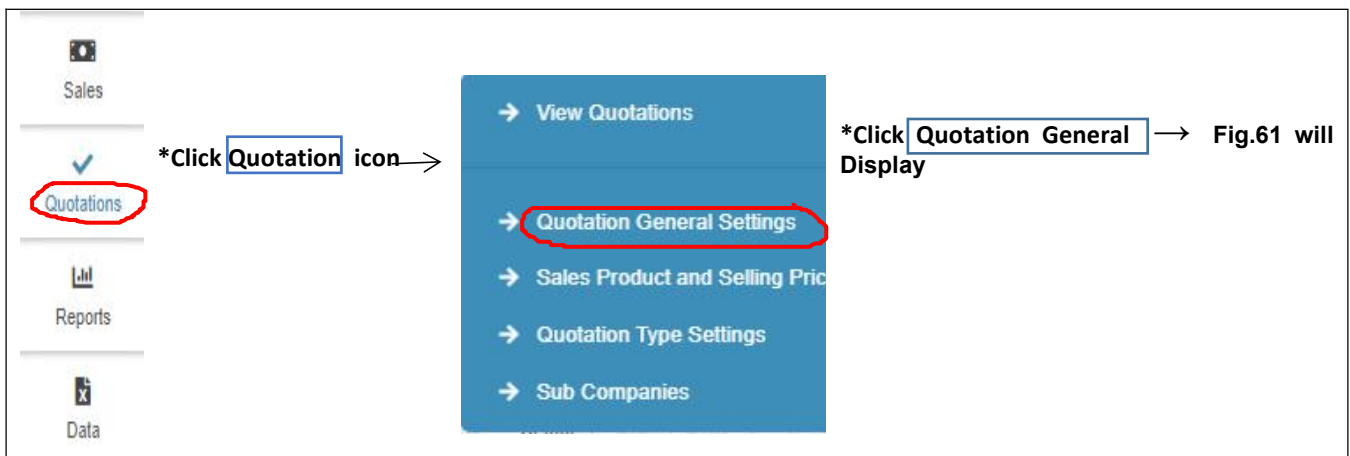
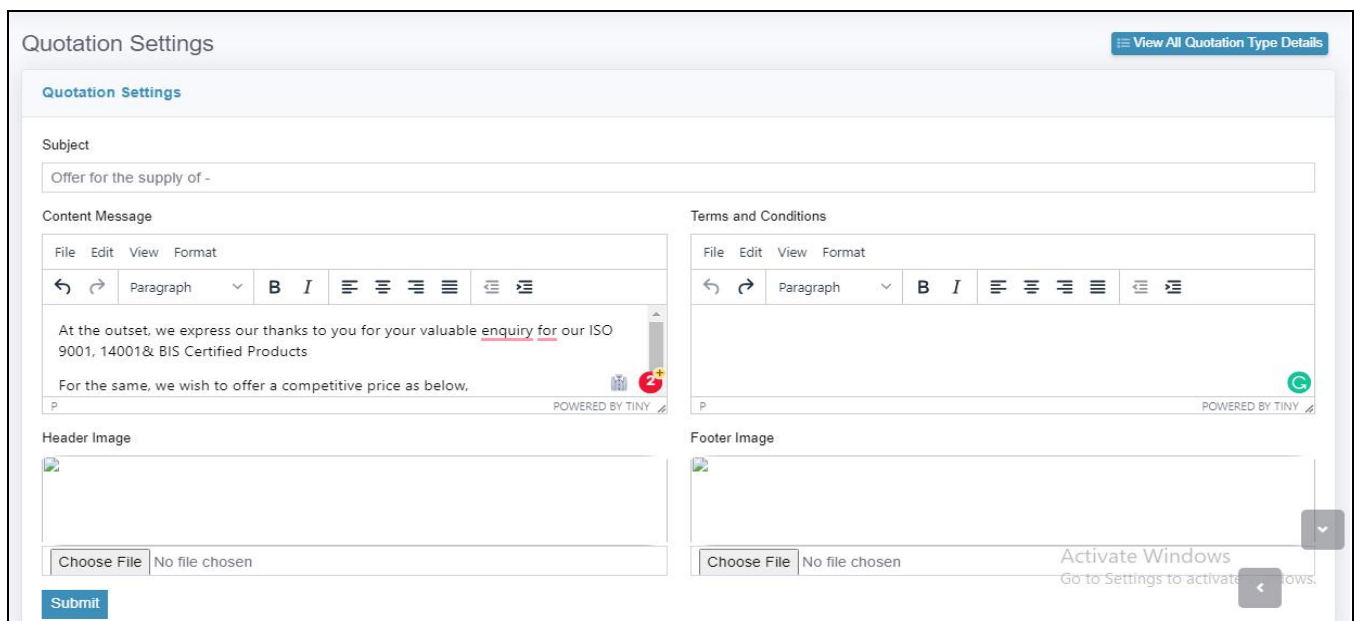
1

Next

Fig.60

\* From this option all the submitted Quotation can be viewed. If the quotation is approved by the customer the orders may be uploaded to the billing Software through standard format.

## QUOTATION GENERAL SETTINGS

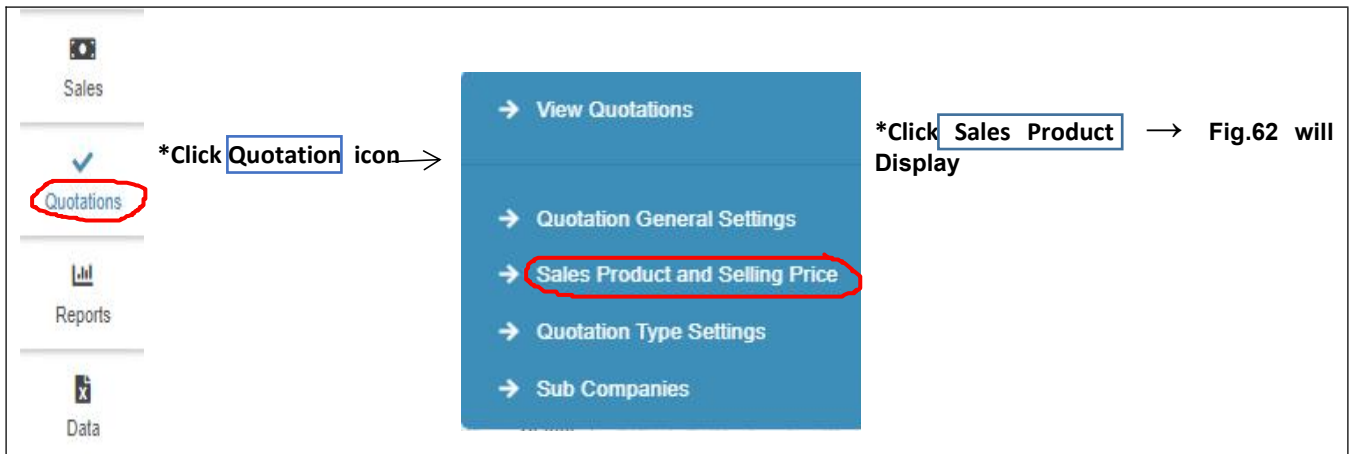
**Fig.61**

\* The General setting has the following changeable option.

1. Header, Footer ie. Your Company Name, Logo, Address etc., can be updated as per requirement.
2. Subject changeable option ( For any products).
3. Content Message ie. Company Profile, Product Format etc., can be updated.
4. Terms and Conditions as per your Business can be updated.

\* Fill all the relevant information and give **SUBMIT**

## SALES PRODUCT & SELLING PRICE



Sales Product Details

Search:

Show 10 entries

S.No	Sales Product	Component	Make	Description	Warranty	Selling Price	Minimum Selling Price	Sale GST %	Installation Charges	Scrap Value	AMC Value	AMC GST %	Edit
1	gaming laptop		hp										Edit
2	(1 year)												Edit
3	0.6KVA LIA UPS with Builtin Battery												Edit
4	0.8KVA RPC Sinewave Inverter												Edit
5	1 KVA / 36 V ONLINE UPS	ONLINE UPS											Edit

Fig.62

\* The Available product names will be displayed as shown above Fig.62 or Create the product names in the Master as required.

\* Click **EDIT** to upload the Product prices in the following Fig.63

Edit Sales Product Details

View All Sales Product Details

Minimum Selling Price Selling Price

Product Name: gaming laptop Component: Make: hp

Description:

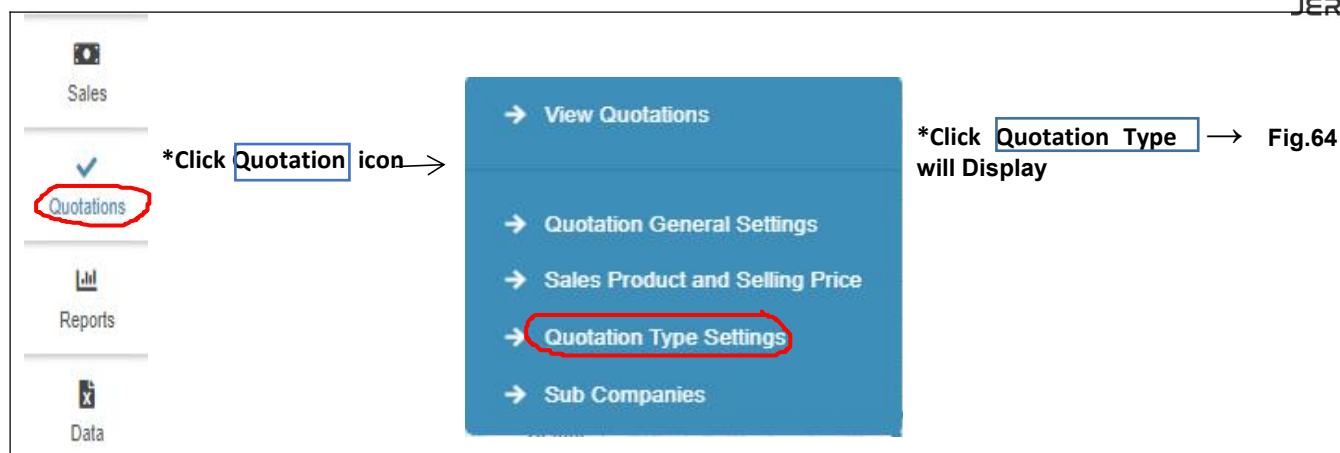
Selling Price: Min. Selling Price: Warranty: GST %:

Installation Charges: Scrap Value: AMC Value: AMC GST %:

Submit

Fig.63

## TYPE OF QUOTATIONS



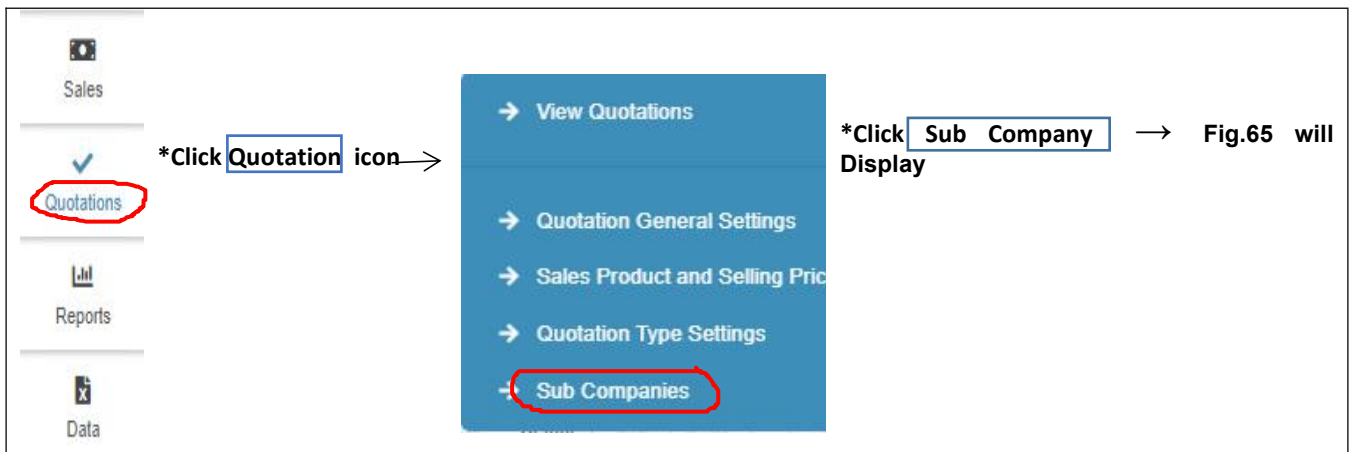
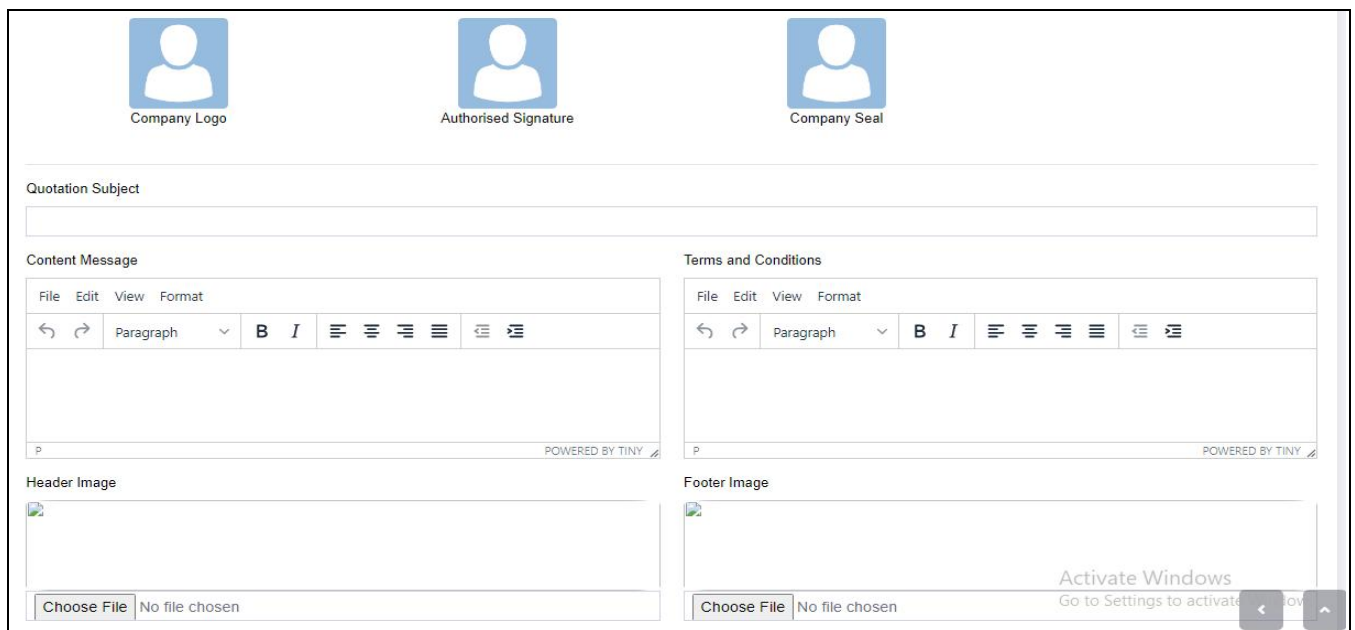
The screenshot shows the 'Edit Quotation Type Details' form. At the top right, there is a button labeled 'View All Quotation Type Details'. The form has a title bar 'Edit Quotation Type Details'. Below the title bar, there is a section for 'Quotation Name' with a text input field containing 'BATTERY QUOTATION'. Below this is a section for 'Additional Terms and Conditions' with a rich text editor. The rich text editor has a menu bar with 'File', 'Edit', 'View', and 'Format'. The text area contains the following text: 'Tax : Quoted Price is inclusive of GST.', 'Payment : 100% Against delivery', and 'Validity : Our offer valid up to 30 Days.' Below the rich text editor is a section for 'Product Types to be available in this Quotation' with a list box containing 'SMF Battery 12V 42AH'. At the bottom left of the form is a 'Submit' button.

Fig.64

\* Any standard Quotation format for UPS, Solar, AMC, and Service can be created.

\* Fill all the relevant information and give **SUBMIT**

## SUB COMPANIES - COMPETATIVE QUOTATION

**Fig.65**

- \* Fill Complete Address and other details including Logo, Signature, Company seal to create the Competitive Quotation Format.
- \* After entering the details Click **SUBMIT**
- \* Any number of Competitive quotation format can be saved.