

**Customer Requirements Specifications (CRS)**

***Sales Management***

***For***

***Samuda Chemicals Ltd.***

# **Document Information**

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| Approved By | Matiar Rahman |
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Signed on behalf of Signed on behalf of

Samuda Chemicals Ltd. Genweb2 Limited

Name: Name:

Designation: Designation:

Date: Date:

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# **Introduction**

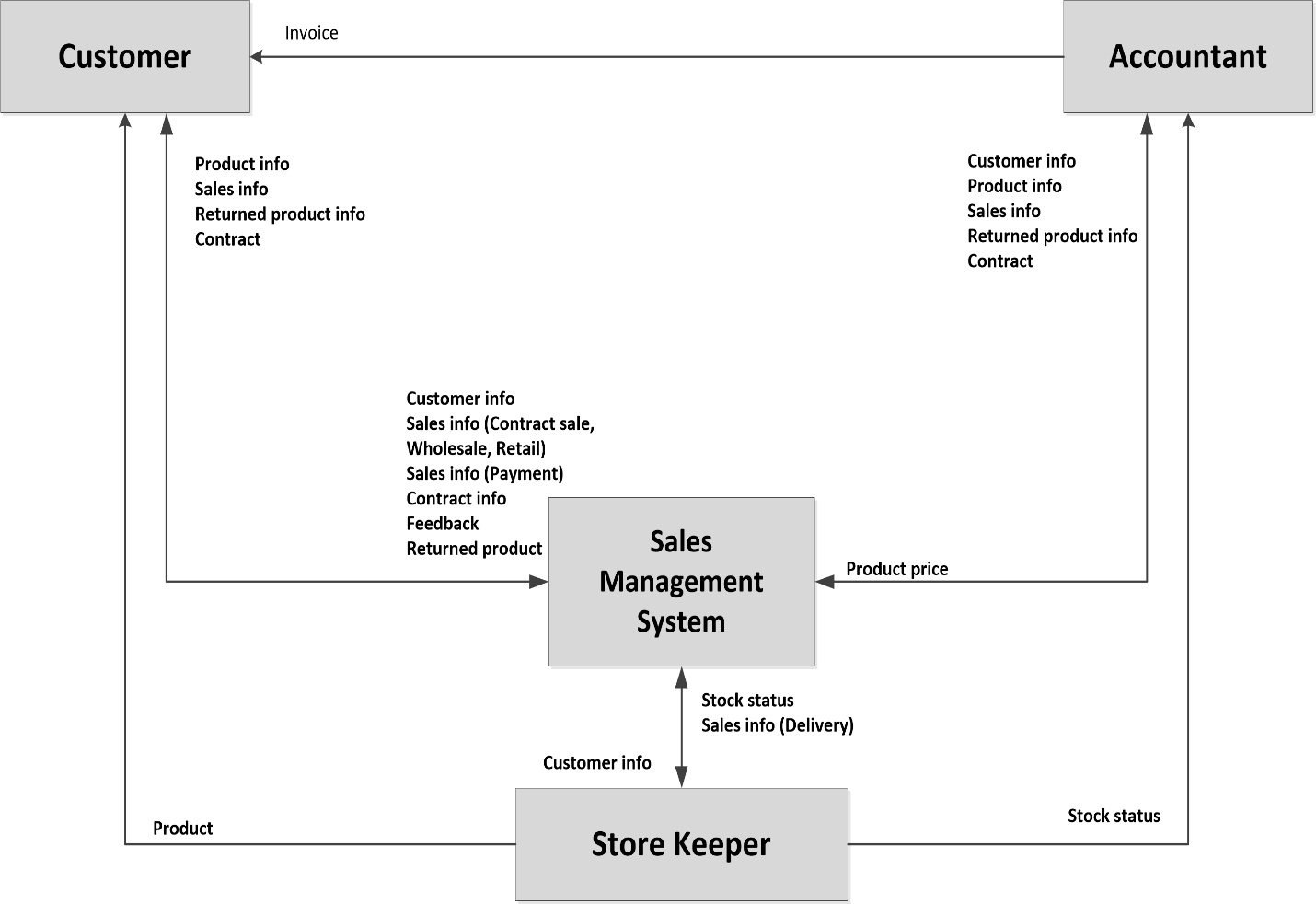
# **1.1 Purpose of CRS**

The purposes of this CRS (Customer Requirement Specification) are to clearly identify the customer requirements and provide a detailed document. The customer will review the document and approve/make changes as required. It will also help the review team to validate whether the customer requirements have been fulfilled or not.

# **Sales Module Overview**

In the context of growing market competition, organizations are focusing more on closer partnership across supply chain. Increasing efficiency in sales process facilitates an organization to maintain its competitive edge. Best practice processes, embedded in an ERP package, are an enabler in this direction.

The important components of sales modules:



**Fig:** Sales Management System

**Integration with other modules:** Sales module is a highly integrated execution module. It draws most of its input from the following modules:

* Inventory module for verifying available and projected stock.
* Production module for production schedules and lead time of delivery.
* Purchasing module for generation of direct delivery purchase order.
* Accounts receivable module where sales invoices are recorded.
* Distribution requirement planning under planning module for just in time delivery and supplying to channels partners.

**Why Organization needs Sales Module**

* Expand sales channels through integration with E-commerce module.
* Increase sales volume by improving sales channels.
* Improve communication with current customers based on trade history.
* Evaluate at any time sales agents by integrating data.
* Detailed organization of the sales process on sales areas, divisions.
* Fast registration of entire flow of specific documents.
* Information about all Customers is collected and maintained using Sales Management System. Based on this information, the Director can easily contact with the Customer directly.
* Information about all delivery products with sell price is collected. Based on this information, the Director can see which product is more popular, which product has good profit, and which product should import continuously. Besides, the Director also can check the buy of the Customers to decide the gift in every festival.
* Information about the returned products and feedback is collected for checking the product quality of the manufacturers.
* Information about delivery and payment are needed for accounting system. Based on this information, the Accountant can inspect or audit the company’s financial record. On the other hand, the director can check how big the debt of the Customer is or how often the Customer receives the delivery or makes payment.
* Information about the contract is needed for the Director to let the Salesman to follow the delivery and the payment of the Customer.



**Fig:** Sales Management Component

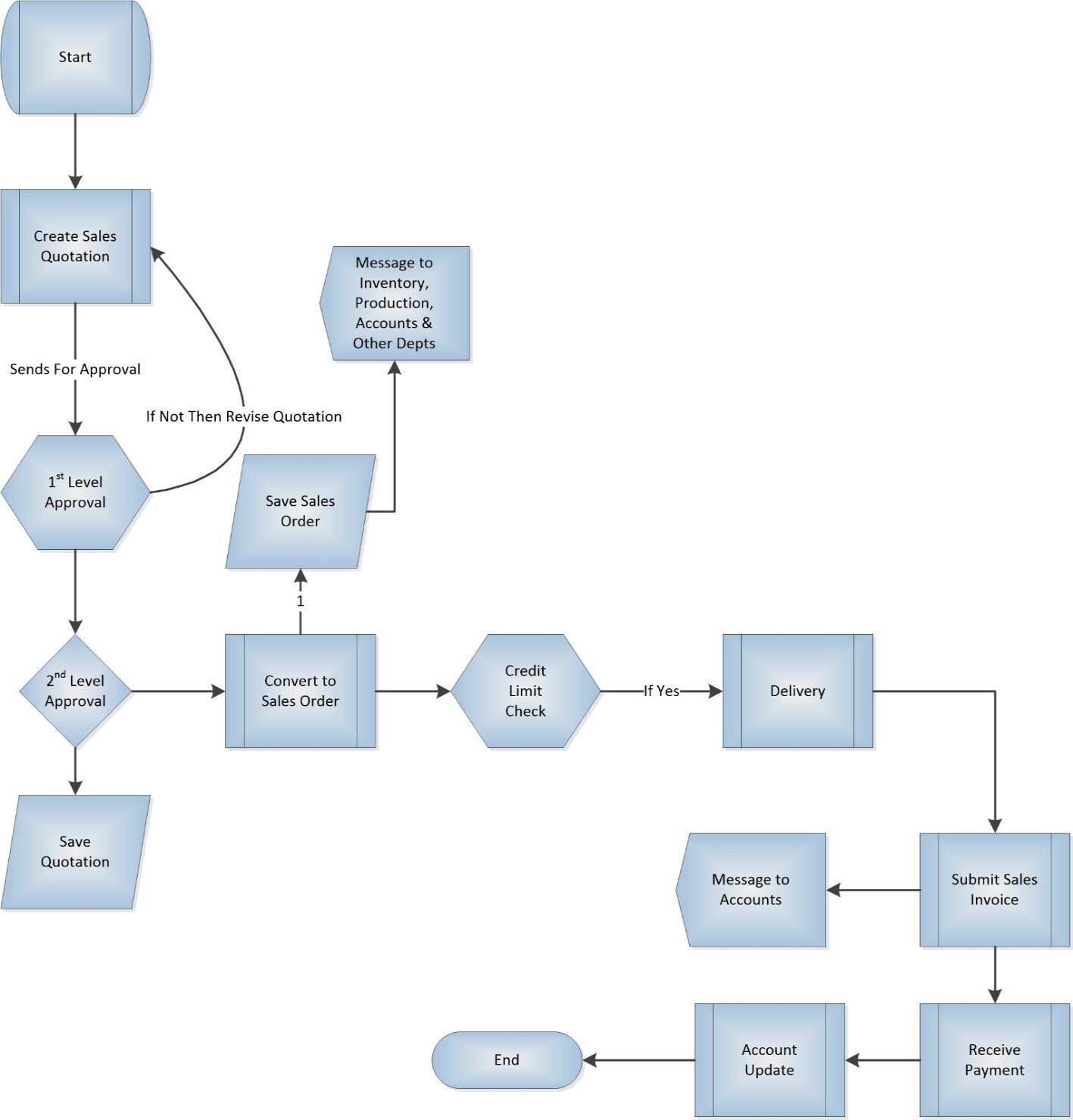
# **Features of Sales Modules**

This module will help Samuda to manages its sales process very efficiently and give full feature list to customize according to business needs. Following are the feature description of Sales Module.

## **3.1 Order to Cash Process**

Sales module of ERP consists of all master data, system configuration and transactions to complete the process of Order to Cash. The main functions of Sales module are:-

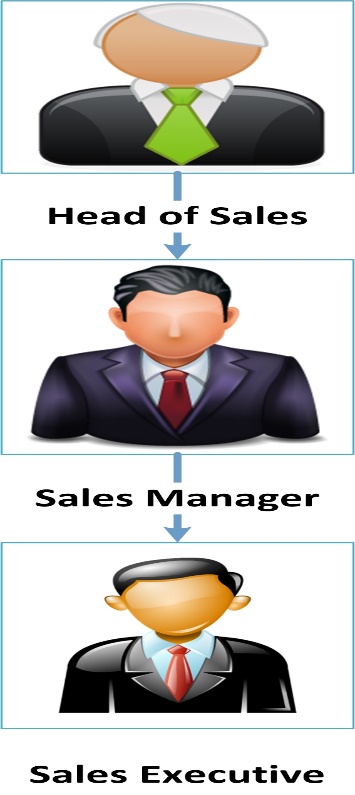
* First Sales quotation is being created
* After sales quotation is created it needs multiple approval process. In all the approval process the sales quotation may be accepted/ revised/ cancelled.
* If the sales quotation is approved by all the approval layers then it is converted to sales order. Besides that once customer confirms the purchase order the sales quotation is converted to sales order.
* When the sales order is created, this message will be forwarded inventory, productions, accounts and other relevant departments.
* Credit limit is being checked for that sales order before delivering the goods.
* Once goods are delivered, sales invoices are submitted to the customer for payment
* Finally the account gets updated upon receive payment.



**Fig**: Order to Cash Process

**3.2 Master Data Management**: - This module is to keep information about all entities so that they can be made available to the decision-makers and also for the automatic generation of reports, contracts, invoices, etc. In Sales module product are sold/sent to business partners. The following are the master data of Sales Module:

1. **Product**- Finished goods will be sold in this module. There will be no variants declared for the finished products. Product will have two type:
   1. Main Item
   2. Auxiliary Item
2. **Territory/Zones-** Sales territory management is more important than many may realize. It can boost sales team’s morale, increase sales, provide a larger customer base and inspire team cohesion. Territory management is a customer group or geographic area over which either an individual salesperson or a sales team has responsibility. These territories are usually defined based on geography, sales potential or a combination of these factors. The ultimate aim of this division of areas is to maximize sales and profits and to allocate resources efficiently.
3. **Sales Team:** The division of a business that's responsible for selling products or services. Evaluating the current **sales** force is an important step in the process of deciding whether and how to grow the **sales team**. The Sales team will consist of following members and maintain the following hierarchy:

****

1. **Customer :**

A party/individual that receives or consumes products (goods or services) and has the ability to choose between different products and suppliers is called customer. One of the key master data in sales module.

**3.2 Sales Order Management**

This module allows company to manage sales operations efficiently and quickly and also provide comprehensive solutions to the management for quotes, prices, contracts, orders, customer discount, price list etc.

## **~~Create and set up a product~~**

First we need to configure our service on the product form itself in order to generate a task every time it will be sold. From the **Sales** module, use the menu **Sales ‣ Products** and create a new product with the following setup:

* **Name**: Technical Support
* **Product Type**: Service
* **Unit of Measure**: Hours (go to **Configuration ‣ Settings** and, under **Unit of measures**, check the **Some products may be sold/purchased in different unit of measures (advanced)** radio button)
* **Invoicing policy**: You can set up your invoice policy either on ordered quantity or on delivered quantity. You can easily follow the amount of hours that were delivered and/or invoiced to your client.
* **Track Service**: Create a task and track hours, as your product is a service invoice able by hours you have to set the units of measures of the product to hours as well.

## **3.3 Create the Sales Order**

Once the product is set up, you can create a quotation or a sale order with the related product. Once the quotation is confirmed and transformed into a sale order, the task will be created.

A sale order have 9 stages.

* Draft Quotation
* Quotation Sent
* Cancelled
* Waiting Schedule
* Sales Order
* Sale to Invoice
* Invoice Exception
* Done

At first we create a *quotation.*

Sales-> Quotation->Create

Select a customer

Inside Order Lines tab click on “*add an item” button.*

Select a Product. After that the systems fills the *Unit Price*and other related fields.

Now you can specify the quantity

In *Other Information* tab we will have several fields like *Shipping Policy* and *Create Invoice.*It can be customized also.

Then save the form. Now the Quotation is created.

After creating a Quotation it can be send to the customer via Email. A pdf format of Quotation will attached in that email. This is not required.

Then we can confirm it as a sale order.

Remember after confirming a sale order one can’t change the important values of the order like (Customer, Product, Quantity, Etc.)

Now we will have three options depends on your *Create Invoice*filed value.

**On Demand –**we can *Create Invoice* or view *Delivery Order* of the Sales Order

**On Delivery Order** – We can view the *Delivery Order*and deliver your product if it is available. Only after completing the Delivery process one can create invoice.

**Before Delivery –**In this option, first one will have to pay the invoice. After that we can deliver the product

*Paid* and *Delivered*Fields, inside the O*ther Information* tab shows the status of invoice and delivery order. After completing these steps your Sale Order workflow will be completed. We can cancel the Sales Order inside any step mentioned above.

### **3.3.1 Price List**

This Feature allows you to use customer specific price list Sale. This helps in a great way in managing business by offering customer specific benefits as per their configured price list. Customer specific pricelist in sales module gives the following feature:

* Assign Price list while creating Customer from the module
* Enables businesses to offer Customer specific Price benefit
* Ease of doing business
* Smooth end to end pricelist flow

## **3.4 Receive feedback from the Customer**

The Customer may contact the Salesman by phone or directly. The feedback of the Customer will be stored in the system and it will be viewable by authorized user only.

## **3.5 Handles the returned product from Customer**

The Customer may return the product with bad quality. The time limit for the return product depends on different situations, such as the returned product still exists in the market but may not exist at the company.

**TBD (will it come from inventory)**

## **3.6 Gives stock status report to Accounting Department**

The Accountant needs a stock status report for checking whether the input and output are matched between the Sales Department, Warehouse, and his/her account record.

## **3.7 Gives quotation list to Customer and Accounting Department**

Every time the new products have been imported to the company, the Salesmen will promote products information as a quotation list of product to the Customer at the company or to Customer’s place. This quotation list usually is printed out in retail price for the Customer but also in wholesale price for the Salesmen. In case the Customer asks for the wholesale price, the Salesmen can follow the quotation list to quote to the Customer.

In order to follow the price easily, the Accountant in Accounting Department also needs a quotation list from the Sales Department.

## **3.8 Gives customer list to Accounting Department**

After the customer information has been recorded in system, it will be given to the Accounting Department.

## **3.9 Gives sales reports to Customer and Accounting Department**

The Salesmen have to send the daily sales reports, which show the daily delivery and payment of the Customers, to the Accounting Department. Sometimes the Customers also require having these sales reports in the certain period to check by him or herself whether they are correct or not.

There are three kinds of sales as following:

**Retail:** When a Customer buys a small quantity of a certain product.

**Wholesale:** When Customer buys a big quantity of a certain product. This wholesale quantity is usually defined by the company, or sometimes the Customer also gives suggestion. On the other hand, the product delivery time is in a very short period usually less than one week.

**Contract sale:** When a Customer buys a big quantity of a certain product in monopolization. The terms of delivery and payment for the product are signed in the contract. The contract price is the lowest price compared with retail and wholesale price. The delivery time is in long period usually more than one week.

## **3.10 Gives contract to Customer and Accounting Department**

After the contract has been made, three copies will be made: first for Customer, second for Accounting Department and third for Sales Department itself.

## **3.11 Gives returned product report the Customer and Accounting Department**

The returned product reflects the quality of the product and influent to the long-term business relationship. On the other hands, the value of the returned product is considered as payment and the debt of the customer will be reduced. The Account needs the returned product report to follow the payment in the account. The customer sometimes requires the returned product report as well.

## **3.12 Gets a delivery receipt from Warehouse Keeper**

The Customer will sign on the delivery receipt after receiving the products. The Salesman will get the signed delivery receipt from Warehouse Keepers after the product has been delivered.

The delivery receipt is made in three copies: first for Customer, second for Salesman, third for Warehouse Keeper him-/herself.

## **3.13 Sales Target**

A specified amount of sales that a management sets for achieving or exceeding within a specified timeframe. Sales targets are apportioned among different sales units such as salespersons, franchisees, distributors, agents, etc.

If the sales targets are achieved, then it is considered as achievement. This achievement can be measured yearly/ half-yearly/ quarterly.

## **3.14 Sales Discount**

 A sales discount is a reduction in the price of a product or service that is offered by the seller, in exchange for early payment by the buyer. This discount may be fixed or percentage. Debit note **(TBD)**

## **3.15 Reports**

* A report of product list with stock status.
* A report of product list with retail price.
* A report of product list with wholesale price and wholesale quantity.
* A report of customer list sorted by selection criteria.
* A report of delivery list in detail information in a certain period for one customer.
* A report of payment list in detail information in a certain period for one customer.

## **3.16 The main external agents**

Accounting Department is a place where keeps, inspects, and audits financial record of the company.

Accounting Department is the external agent of the sales management process and internal agent of the company.

Customer may be a person, a workshop or a store that buys products at the company.

A warehouse is a place where storages the company’s products. Each ware house has its own stock. There is one Warehouse Keeper in each warehouse.

The warehouse is external agent of the sales management process and internal agent of the company.

A supplier is a manufacturer or an exporter who supplies products to the company.

The supplier is an external agent of the company.

# **4. To be Determined**

1. ISO 9001 related reports are not implemented within this phase. We will cover in next phase.

Signed on behalf of Signed on behalf of

Samuda Chemicals Ltd. Genweb2 Limited

Name: Name:

Designation: Designation:

Date: Date:

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