**CRM & QUOTATION CREATION MODULE**

1. **Enquiry Management System**
2. **Enquiry**

* Enquiry to have Description of requirement and Not Item and Parameters from Masters.
* One Enquiry to have one Item Only
* Enquiry Form to have Enquiry No. Auto generated, Enquiry Date, Enquiry No, Department, Item Description (Multi Line Text Box 2500 Char)
* One Enquiry to have 1 Item.

1. **Follow up Entry**

* Follow-up Entry for query with next follow-up date, Status, Nature(Hot/Normal), Discussion
* Details and Reference to Quotation
* One enquiry to have one quotation only
* If the quotation related to an Enquiry is modified only Latest Quotation will be kept No record of old quotation
* Status can be Open/Won/Lost/Hold there will be reason for Won/Lost/Hold Enquiries.

1. **Enquiry Related Reports**

* Follow-up Due in Next N Days
* List of Open/Won/Lost/On-Hold queries
* Reason wise list of Lost Enquiries
* Query Details with Follow-up Details

1. **Others**

* Customer detail -from customer master for existing customers
* For New Customers a Customer Name address etc. to be filled in Quotation it self.

1. **Price List Management**

**Price Will be for Testing**

* There will be multiple basis of Price List

1. Parameter + Instrument + No of Injection +… Wise: If this type of Price list is attached to quotation then while creating quotation all parameters to be defined along with Instrument, Method and No of Injections +…… If Rate for a Particular Parameter + Inst+ Method etc. does not exist then first It has to be created by authorized person and the quotation can be Partially Saved. [Not Allowed to open another window to add rate and continue Quotation].We need to mention that quotation is partially saved if so done.
2. Fixed Rate – Any Item any Number of Parameters – Same rate for all Items of all categories This will be Client wise

Notes: - Branch, Department and customer wise

1. Product wise – Any number of Parameters One rate for that Product This will be Product wise in Price List and then can be Product-Customer wise also

Notes:- This invoicing structure will be removed from the invoicing structure

1. State wise – All Clients of that state will have same rate for a Product or may be for all products
2. Assay Wise

Notes:- Point (I) & (v) are same. As for some parameters rates will be added instrument & method wise where as in some parameters rates will be added no. of injection, detector & running time wise. This provision is already available in Pharma invoicing structure ,only we have to incorporate it in Product Test tab for all.

**Pricing will also be for Residues Testing**

* This will be based on No of residues residue category wise Slab Wise (0-5, 5-10, 10-20 etc) i.e. if 0-5 residue are tested then Rate will be Rs. K
* It is assumed the Residue category master is already there if Not then additional 8 Hours

**Pricing will also be for Sample Collection**

IF sample is to be collected there has to be additional cost. There is no price list for that It is to be added while creating quotation

Notes:- No master will be created for sample collection charges . It will be added by the user at the time of quotation creation.

1. **Quotation Management System**

Quotation entry will be same as Order entry and same way it will pick standard rates and will have a Enquiry No.

**One Quotation will have one item only**

Notes:-(a) The values defined in quotation for per item are as follows:-

Department, Product, Category, subcategory, regulation, product , parameter category , parameter, instrument, detector, running minutes, no. of injections , method, testing time, NABL scope, parameter wise price, option for sampling selection and rate entry and more

(b) Format of quotation will be provided by ITC ONLY ONE FORMAT FOR ALL QUOTATION WILL BE THERE

Once Quotation is created it can be modified before marking it as Final. Orders can be place only against Finalized Quotations.

**Finalized quotation will have a customer code from customer master and not Just customer name as text even if it was so in the beginning**

Notes:- User has full right to change the quotation no. of times without the approval of Administrator until its is not marked as Final.

Once the quotation is marked as Final then user can't do any kind of editing without the Administrator.

**NOT EVEN ADMINISTRATOR CAN CHANGE A FINALISED QUOTATION IF SOME ORDER IS RECEIVED AGAINST IT**

Quotation Status will be

* Open
* Finalized and Won (Order can be against this only provided the date validity is there)
* Lost with Reason – A Standard list of Reasons for Lost.
* **Closed – No More orders against this. For this item for this customer New Quotation need to be created. Closed quotation cannot be reopened if date is expired or a New Quotation is finalized for that item for that customer.**

**Validity date will be applicable for finalized quotations only**

Active/Inactive – Any Quotation can be made inactive and no order can be place against that if made inactive.

There can be more than one order against each quotation. Only parameters can vary i.e. reduced and not the rates in order pertaining to a quotation

Quotation to have Text Box for Terms and Conditions which will be used for Printing only and system not to Draw any inference from T&C.

Notes:- One standard master will be created for terms & conditions branch wise so that ITC can do any kind of editing in terms & conditions as per requirement.

Quotation to have Sample Collection Charges

Quotation to have expiry Date

**Discount System.**

Only Item wise %age discount can be

Notes: - Calculator will be provided to calculate discount % by entering the required amount.

There will be a Discount Authorization Limit – A master of the form

Discount Slab -> List of Authorized Users.

**Email if discount is above range**

In a Quotation if Discount is given there has to be explanation in the discount comment Box for each item and a Mail will be sent to that slab’s Authorized users that in this qtn for this item Discount is given**.**

**Saved Quotation can be sent to Customer over email on Click of a Button.**

* Parameters will be selected as per regulation from existing product master department wise or from test parameter master.
* Linking with Inventory is not in Present Scope as Inventory Module is not there to track the availability of chemicals, columns and standard while the creation of quotation.
* Option to copy quotation from another Quotation (All Paramerts etc will be copied)

**THERE WILL BE ONLY ONE QUOTATION ACTIVE FOR A CUSTOMER FOR AN ITEM**

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**Quotation creation**

Enquiry From Customer

Enquiry Entry – Customer From Customer master or complete name address etc. to be filled in Enquiry For.

Items Etc. to be descriptive

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Quotation – One quotation for One Enquiry

One Quotation One Item

A Common Term and Conditions for whole Quotation

Terms and Conditions Descriptive in a Text Box Only

Quotation will be created on the basis of ITC rate list defined in the product master parameter wise.

Selection criteria for rates as per requirement of customer(Packaged price or parameter wise price) will be selected by user.

Auto calculation of discount in ITC rates parameter wise will be done by software if packaged price will be given by customer.

Discount % will be defined up to 3 levels depending upon amount of quotations.

Quotation will be created by giving auto generated quotation no. by the software and shared with customer. Each Item in Quotation will have a Sub Qtn No.

Quotation can be edited till Finalised. Status will be for Individual Sub Quotation Wise

Status will be entered by user(Finalised, Open). And each will have sub status

Open (Quotation can be modified)

This will be by Default Status

Finalised (Cannot be modified)

Closed

Finalised

Hold (Y/N)

Rejected

No Order Can be taken against this. Quotation Whose expiry date is exceedwill automatically be closed

Orders Can be placed for Such Quotations Only.

Regret tracker will be maintained with the reason of Rejection

Quotation no. along with sample name & parameter detail will start reflecting on sample receiving dashboard for the receiving of sample.

Order booking will be done on the basis of test parameter defined in the quotation. No editing in the test parameter will be allowed. Parameters can be reduced but not increased or changed

PI Can be generated from Order.