**List of New Tasks (Scope-3)**

**Process-Flow**

**(1) Hold Provision:-**

**In Current: -** We have "Hold" provision at the time of Order Booking; first we book the sample then again open it for "Hold" option. At the time of "Hold”, the user will specify one reason. The "Hold" stage of sample reflects as "H" in Scheduling stage in TAT MIS. Sample is not listed in any further stages until it is not Unhold. At the time of Unhold the expected due date of sample is calculated again from the date of Unhold.

**New Requirements: -**

1. One standard list of "HOLD” options will be displayed to the user to be maintained by Administrator. If in the standard list value "Others" will be, displayed then one text box will be displayed to the user to define the reason.

**STEPS for A:**

**Step-1: Add ‘Hold list’ submenu under Master menu.**

**Step-2: Implement the following action on hold master:**

* 1. **Adding of Hold Master**
  2. **Editing of Hold Master**
  3. **Listing with sorting and searching**
  4. **Deleting of Hold Master.**

(B) An Order confirmation mail will be sent to the customer specifying the reason of Hold

(C) If the reason of Hold is GST No. (Value selected by the user from the list) then report will be Hold at the "Approval to QA" stage by the system itself. When user update the GST no. in the customer master then system by default "Unhold" the sample from "Approval to QA" stage.

(D)If the reason of Hold is Credit Note (value selected by the user from the list ) then at the time of Unholding the sample ,system asks for either the cheque no. & date or take approval from concerning department CS

(E) Again an order confirmation mail will be sent to the customer describing the new expected due date of sample on Unholding the sample.

(F) If a sample is not "Unhold" within 3 days then reminder mail will be sent to the customer.

(G) During booking, when sample will be kept Hold then system will not ask for test selection. Test Parameters will be selected at the time of Unholding the sample.

**STEPS for B, C, D, E, F, G:**

**i) Order Form Changes:**

**-Show a dropdown-containing list of Hold reasons from Hold Master.**

**-Choose Hold Options from Dropdown: If hold reason is 'Others’, then showing of TEXTAREA for entering the User defined hold reason else, user will select the hold reason from the Hold Master Dropdown.**

**-If users select hold option at the time of booking an order by Order Booker/Admin, system does not ask for Test Parameters selection and will do the following activities:**

* **Only ask for Customer Detail**
* **Only ask for Sample Detail**
* **Will not check for Invoicing Structure.**
* **Allow Booker to Save the Order without Test Parameters.**
* **A confirmation mail will be sent to the customer specifying the reason of Hold in background using CRONJOB Scheduler.**

**ii) Order Listing Changes:**

* **If an Order is in hold status, then it will not allow the user to perform the Edit option as long as it is not unload by the CRM/ADMIN User.**

**iii) Approval to QA Changes:**

**If hold reason is 'GST Number’, then**

* **System will check the hold/Unhold status of report at the "Approval to QA" stage by the system itself.**
* **When user update the GST no. in the customer master then system by default "Unhold" the sample from "Approval to QA" stage.**

**iv) Each time Unholding the Sample, the expected due date will be recalculated by the system and maintained the expected due date log change in a separate table.**

**v) Each time an Order/Report will be hold/Unhold, a confirmation mail will be sent to the customer.**

(H) Hold at any stage:-A dashboard will be provided to CS team to hold the sample at any stage after booking along with a text box to define reason in it.Hold current stages are as follows:-

* Scheduling
* Testing
* Section Incharge
* Reviewer
* Finalizer
* Approval to QA

**Points to be Noted regarding hold at any stage:-**

* Calculation of Expected Due Date: - On Unholding, the sample new expected due date will be calculated by the system depending upon the test parameters selected at the time of order booking.
* A Sample can put "Hold" on no. of times. Every time the hold mail will be sent to the customer.
* Attaching a mail body text to be sent on Holding & Unholding of sample(Option of sending auto mail at the time of holding & Unholding a sample will be optional and will be selected by CS)

**STEPS for H:**

**i) On order listing dashboard of CRM, Hold/Unhold button will be displayed with an Orders having the status following:**

* **Scheduling**
* **Testing**
* **Section Incharge**
* **Reviewer**
* **Finalizer**
* **Approval to QA**

**ii) On clicking the ‘Hold’, a popup window appears containing reasons from Hold Master as a dropdown. If hold reason is 'others’, then showing of TEXTAREA for entering the User defined hold reason. And Order will be put on Hold.**

**iii) On Clicking the Unhold button,** **a popup window appears containing a text box asking for reason of Unhold. If hold reason is 'Credit Note’, system asks for either the cheque no. & date. Show a text box in popup for cheque number and a date picker for cheque date.**

**v) Each time Unholding the Sample, the expected due date will be recalculated by the system and maintained the expected due date log change in a separate table.**

**vi) Each time an Order/Report will be hold/Unhold, a confirmation mail will be sent to the customer.**

(I) MIS:-

(i) New MIS of hold samples with their detail.

**Search Criteria: -** Branch Name, Department Name, Hold Date From, Hold Date To

**Fields in reports are** :- Booking Date, Customer Name, Place ,Sample Name, Batch No**.,**Expected Due Date, Stage of sample, Hold Date ,Unhold Date ,Reason

(ii) TAT Report:-

* Using the Hold at any stage option the "H" status will be reflected in column of active stage of sample.
* One new column of Hold reason will be added to TAT.

**STEPS for I:**

**On MIS-Report Form:**

**i) Creation of New MIS Option in MIS Report Dropdown form named ‘Hold-Sample-Report’.**

**Ii) Addition of Two New Fields Hold Date from and Hold Date To**

**iii) On Clicking the Generate Button on MIS-Report Form, the MIS-Report will be generated with Booking Date, Customer Name, Place, Sample Name, Batch No., Expected Due Date, Stage of sample, Hold Date, Unhold Date, Reason.**

**iv) On Clicking Export to Excel, the document will be downloaded with Booking Date, Customer Name, Place, Sample Name, Batch No., Expected Due Date, Stage of sample, Hold Date, Unhold Date, Reason.**

**(2) Accounts Related Task:-**

TASK-(A) Incorporate Branch code in invoice no. i.e. 01 for Panchkula & 02 for Chennai. This change will be applicable from one specific date and will not be implemented in existing invoices.

**STEPS:**

**i) Implementation of Branch Code in generation of Invoice number.**

**ii) Activation of Branch Code in Invoice Number from a decided/specific date.**

**iii) Branch Code Implementation will not made any impact on already generated invoice.**

TASK-(B) Category of Customer: - In customer master category of customer for the GST, no. will be defined. The categories are as follows:-

**GST NO. Categories**

**Individual Overseas SEZ GSTIN**

**GST NO. B2C OVERSEAS SEZ Applicable**

**Tax Slab Applicable NA NA Applicable**

In Case of overseas & SEZ no tax slab will be applicable in the invoice.

**STEPS:**

**i) Creation of Customer Invoicing category table.**

**ii) On Customer Master Add Form:**

* **Displaying of Customer Category as a drop down.**
* **And If Customer Category is:**

**a) Individual, then B2C will be the GST Number and tax slab will be applicable.**

**b) Overseas, then Overseas will be the GST Number and tax slab will not be applicable.**

**c) SEZ, then SEZ will be the GST Number and tax slab will not be applicable.**

**d) If Customer Category is GSTIN, then validation criteria will be applicable on GST Number and tax slab will be applicable.**

**iii) On Customer Master Edit Form:**

* **Displaying of Customer Category as a drop down.**
* **And If Customer Category is:**

**a) Individual, then B2C will be the GST Number and tax slab will be applicable.**

**b) Overseas, then Overseas will be the GST Number and tax slab will not be applicable.**

**c) SEZ, then SEZ will be the GST Number and tax slab will not be applicable.**

**d) If Customer Category is GSTIN, then validation criteria will be applicable on GST Number and tax slab will be applicable.**

**iv) On Invoice Generation of listed Billing Type:**

* **Daily Billing: If Customer Category is:**

**a) Individual, then tax slab will be applicable.**

**b) Overseas, then tax slab will not be applicable.**

**c) SEZ, then tax slab will not be applicable.**

**d) If Customer Category is GSTIN, then tax slab will be applicable.**

* **Regular Billing: If Customer Category is:**

**a) Individual, then tax slab will be applicable.**

**b) Overseas, then tax slab will not be applicable.**

**c) SEZ, then tax slab will not be applicable.**

**d) If Customer Category is GSTIN, then tax slab will be applicable.**

* **Weekly Billing: If Customer Category is:**

**a) Individual, then tax slab will be applicable.**

**b) Overseas, then tax slab will not be applicable.**

**c) SEZ, then tax slab will not be applicable.**

**d) If Customer Category is GSTIN, then tax slab will be applicable.**

* **Monthly Billing: If Customer Category is:**

**a) Individual, then tax slab will be applicable.**

**b) Overseas, then tax slab will not be applicable.**

**c) SEZ, then tax slab will not be applicable.**

**d) If Customer Category is GSTIN, then tax slab will be applicable.**

TASK-(C) Reason of Cancellation of Invoice: - Reason of Cancellation and approved by & approved date will be entered by the Invoicer before the cancellation of Invoice. All the three fields will be reflected in Account sales Detail.

**STEPS:**

**i) On clicking the existing cancellation Invoice button, a popup will be displayed with listed fields:**

* **Reason of Cancellation**
* **Approved by**
* **Approved date**

**ii) Saving to listed Invoice cancellation detail in a separate table ‘order\_cancellation\_dtl’-**

* **Reason of Cancellation**
* **Approved by**
* **Approved date**

**iii) MIS-Report: Account Sales Detail:-**

**Software View/Download View: Adding of listed New Columns:**

* **Reason of Cancellation**
* **Approved by**
* **Approved date**

**In listed three documents Type:**

* **Sales Invoice**
* **Credit Note**
* **Debit Note**

**(3) New MIS** –

One New MIS displaying the status of order confirmation mail, test report mail, voice of customer mail ,hold samples confirmation mail, Unhold samples confirmation mail, invoice mail etc. The fields in the report are as follows:-

**Search Criteria: -** Branch Name, Department Name, Emailed Date From, Emailed Date To

**Fields in reports are** - In all except Voice of Customer

Booking Date, Customer Name, Place, Sample Name, Batch No**.,** Expected Due Date, Emailed Date & Time, With Attachment(Y/N), Email address

&

In Voice of Customer filed in reports will be customer wise sample and customer wise summary

**Customer wise sample :-** Order booking No, Sample Name, Order Boking Date, Expected Due Date & Report Date, TAT(in days) ,Within TAT(Y/N).

**Customer wise summary: -** Customer Name, Place, Sample Count, Within TAT, Performance (in %)

**STEPS:**

**On MIS-Report Form:**

**i) Creation of New MIS Options in MIS Report Dropdown form named ‘Mailing-Report-All’ and ‘Mailing-Report-VOC’.**

**Ii) Addition of Two New Fields Mail Date from and Mail Date To**

**Software View/Download View:**

**iii) On Clicking the Generate Button, it will generate the report with columns Booking Date, Customer Name, Place, Sample Name, Batch No., Expected Due Date, Emailed Date & Time, With Attachment(Y/N), Email address for Mail-Report-All.**

**iii) On Clicking the Generate Button, it will generate the Mailing-Report-VOC with two headings:**

**Customer wise sample :- Order booking No, Sample Name, Order Boking Date, Expected Due Date & Report Date, TAT(in days) ,Within TAT(Y/N).**

**Customer wise summary: - Customer Name, Place, Sample Count, Within TAT, Performance (in %).**

**iv) On Clicking Export to Excel, the document will be downloaded with columns Booking Date, Customer Name, Place, Sample Name, Batch No., Expected Due Date, Emailed Date & Time, With Attachment(Y/N), Email address for Mail-Report-All.**

**v) On Clicking Export to Excel, the document will be downloaded with two headings:**

**Customer wise sample :- Order booking No, Sample Name, Order Boking Date, Expected Due Date & Report Date, TAT(in days) ,Within TAT(Y/N).**

**Customer wise summary: - Customer Name, Place, Sample Count, Within TAT, Performance (in %).**

**(4)** **Amendment Provision:-**

(A) One standard list of "Amendment” options will be displayed to the user to be maintained by Administrator. If in the standard list value "Others" will be, displayed then one text box will be displayed to the user to define the reason.

**STEPS:**

**i) Creation of Amendment Master with listed actions:**

1. **Adding of Amendment Master**
2. **Editing of Amendment Master**
3. **Listing with sorting and searching of Amendment Master.**
4. **Deleting of Amendment Master.**

**ii) On clicking the existing amendment button, a popup will be displayed with listed fields-**

* **Amendment Reason. : If hold reason is 'others’, then showing of TEXTAREA for entering the User defined reason.**
* **Amended by**
* **Amended Date**
* **Amended Stage**

**ii) Saving to listed amended detail in a separate table ‘order\_amended\_dtl’-**

* **Amendment Reason**
* **Amended by**
* **Amended Date**
* **Completion Date**
* **Amended Stage**

1. In TAT report: -

One column of amended report will be added in TAT displaying date of amendment and will display "P" in corresponding pending stage. On completion of amended report, amended report completion date will be displayed in another column. New column of reason of amendment.

**STEPS:**

**On TAT MIS-Report: Addition of New Colum is in listed view:**

**Software View/Download View: Displaying of listed Columns:**

**Before Completion of Report:**

* **Amendment Date**
* **P in Stage**

**After Completion of Report:**

* **Amendment Date**
* **Completion Date**
* **Stage**
* **Reason of Amendment.**

(C)MIS of amendment:-

**Search Criteria: -** Branch Name, Department Name, Amendment Date From, Amendment Date To

**Fields in reports are** :- Booking Date, Customer Name, Place ,Sample Name, Batch No**.,**Expected Due Date, Stage of ammendment,Ammended Date ,Reason,Ammended Completion Date.

**STEPS:**

**On MIS-Report Form:**

**i) Creation of New MIS Option in MIS Report Dropdown named ‘Amended-Report’.**

**Ii) Addition of Two New Fields Amended Date from and Amended Date To**

**Software View/Download View:**

**iii) On Clicking the Generate Button on MIS-Report Form, the MIS-Report will be generated with Booking Date, Customer Name, Place, Sample Name, Batch No., Expected Due Date, Stage of amendment, Amended Date, Reason, Amended Completion Date.**

**iv) On Clicking Export to Excel, the document will be downloaded with Booking Date, Customer Name, Place, Sample Name, Batch No., Expected Due Date, Stage of amendment, Amended Date, Reason, Amended Completion Date.**

**(5) Expected Due Date Change: -**

No scheduler have right to change the due date after scheduling. Provision is enabled to CS and system will track complete log of expected due date. Auto mail will be sent to customer on the change of expected due date (Provision to send mail will be optional and selected by CS).When CS will change the expected due date of sample then system ask for the reason to change.

**STEPS:**

**i) Removing of expected due date change functionality for scheduler.**

**ii) Implementing the expected due date change functionality for CRM with a reason Textbox on CRM Dashboard.**

**iii) Each time an Expected Due date will change, the expected due date will be maintained as a log in a separate table.**

**iv) Each time an Expected Due date will change, a mail will be sent to the customer.**

**(6) Small Queries :-**

(a) Cloning of existing one test master into other test master.

**STEPS:**

**i) Cloning will be performs only in same department.**

**ii) Implementation of Cloning in following ways:**

**a) The whole Test Master including-**

* **Test Code,**
* **Testing Products,**
* **Testing Standard,**
* **Wef,**
* **Upto,**
* **Parameters,**
* **Equipments,**
* **Methods,**
* **Detectors,**
* **Testing Standards,**
* **Standard Value From,**
* **Standard Value To,**
* **Claim Dependent,**
* **Time(In Days),**
* **Time(In Hours:Minutes),**
* **Standard Value Type,**
* **NABL Scope,**
* **Decimal Place**

**As a New Test Master.**

**b) The coping of One Test Mater**

* **Parameters,**
* **Equipments,**
* **Methods,**
* **Detectors,**
* **Testing Standards,**
* **Standard Value From,**
* **Standard Value To,**
* **Claim Dependent,**
* **Time(In Days),**
* **Time(In Hours:Minutes),**
* **Standard Value Type,**
* **NABL Scope,**
* **Decimal Place**

**in another Test Master.**

(b) Branch code in holiday master.

**STEPS:**

**i) On Adding of Holyday Master:**

* **New field addition for Branch as a Dropdown**

**ii) On Editing of Holyday Master:**

* **New field addition for Branch as a Dropdown**

**iii) Implementation of above Branch code in the generation of Expected due date while-**

* **Booking an Order by Booker.**
* **Changing the Expected Due date by Admin/CRM User.**
* **Changing the Order Status to Unhold each time by Admin/CRM User.**

(c) If test time(in days) is zero in parameters of selected test master then system will show alert to order booker before booking.

**STEPS:**

**i) While booking an order, system will show the alert for the order having TAT Zero.**

**ii) While Editing the Order, system will show the alert for the order having TAT Zero.**

**(d) Dynamic report -For Order Booking, Test Report & Invoicing (under analysis- finalize after discussion with Drish)**

**[Need discussion about its UI and Functionality. This task is not included in current Estimation. Its Estimation will be given after finalization of its UI and Functionality]**

(e) In Pharma asterisk symbol for samples at the time of invoicing having value in Real time stability note.

**STEPS:**

**i) At the time of Invoicing on Invoice Generation Window, if order contain real time stability note parameter,then \* symbol will be displayed inform of Order Number.**

(f) Provision of country in invoicing structure:

**STEPS:**

**Implementation of Country/State Structure on listed section:**

**i) Customer Wise Product Invoicing.**

**ii) Customer Wise Parameters Invoicing.**

**Iii) Customer Wise Assay Parameter Rates Invoicing.**

**iv) Adding of Order for selection of Invoicing to and Reporting To.**

**v) Editing of Order for selection of Invoicing to and Reporting To.**

**vi) State Master-Adding and Editing**

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