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

**Part-1 : Process-Flow**

**(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 %).**

**(6) Small Queries :-**

TASK-(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.**

TASK- (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.**

TASK- (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.**

TASK- (d) 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.**

TASK- (e) 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**

**\*\*\***