List of New Tasks

(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" one reason will be specified by the user. 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: -**

(a) 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.

(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

(d) Again a order confirmation mail will be sent to the customer describing the new expected due date of sample on unholding the sample.

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

(f) 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.

(g) 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:-**

(a) 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.

(b) A Sample can put "Hold" on no. of times. everytime the hold mail will be sent to the customer.

(c) Attaching a mail body text to be sent on Holding & Unholding of sample(Option of sending automail at the time of holding & unholding a sample will be optional and will be selected by CS)

(h) 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.

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

(a) Incorporate Branch code in invoice no. i.e. 01 for panchkula & 02 for Chennai. his change will be applicable from one specific date and will not be implemented in existing invoices.

(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.

(c) Reason of Cancellation of Invoice :- Reason of Cancellation and appoved 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.

(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 %)

(4)**Ammendment Provision :-**

(a) One standard list of "Ammendment" 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.

(b) In TAT report :- One column of ammended report will be added in TAT displaying date of ammendment and will display "P" in corresponding pending stage. On completion of ammended report ammended report completion date will be displayed in another column. New column of reason of ammenment

**(c)In MIS of ammenment :-**

**Search Criteria :-** Branch Name, Department Name, Ammendment Date From ,Ammendment 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.

**(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.

**(6) Small Queries:-**

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

(b) Branch code in holiday master.

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

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

**Discussion Job:**

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