**Quotation/PI Module Process Flow**

**Steps involved in Quotation/PI Module:**

1. Creation of Quotation Detail:
   1. Header / Customer Section-
      1. Autofill Customer Name / Manual Typing of Customer Name – Can select the customer name from customer master as well as can type new customer name.
      2. Contact Person Name
      3. Organization name
      4. Date and Time
   2. Sample / Parameter Section-
      1. Sample Name-Name of the sample for testing.
      2. Division name
      3. Department name
      4. Product name: User can select from Product Master (Tree View) as well as if not available can type the Product Name.
      5. If a user select the Product name from Product Master (Tree View), then the Test Master Name as well as its related parameter will be listed according to the Test Master Name.
      6. If a user typed the Product Master Name, then adding of Test parameter will be manual process where user will type each of the required Test Parameter name of a particular Quotation.
      7. Quotation Amount- Input Type.
      8. Discount Amount/Discount Percentage input type based on Discount Type Selection.
   3. Term & Condition Section:

Listing of below Terms:

* + 1. Please call the undersigned if there are any questions regarding this quotation.
    2. GST will be applicable extra @18% on above mentioned charges currently as per govt. of India regulation.
    3. Sampling & conveyance charges will be extra: are on actual basis (if applicable).
    4. TDS Certificates: TDS certificates shall be issued to us promptly before the end of respective financial year.
    5. Terms of Payment: Payment 100% advance.
    6. Cheque / DD / RTGS in favor of Interstellar Testing Centre Pvt. Ltd.
    7. The quote is valid for 30 days from the date of issue.
  1. Quotation No. Generation:
     1. For Example:
        1. P01-190218Q0001 where-
           1. P – Department Name
           2. 01/02 – Division Name
           3. 190218 – Date Format(year/month/date)
           4. Q – Denotes Quotation
           5. 0001 – Series from 0001 to 9999.

1. Quotation Generation Process:
   1. Customer Wise Product-

In this Quotation Generation Process, the rate for the particular quotation will be provided according to the Product specific. There will be an input type where user enters the Quotation Amount.

***CASE I:*** If Product Name as well as its related Test Master with Test Parameters available in the system, then user will select the Product Name as well as its Test Parameters from popup window and enter/type the rate in the provided input box.

***CASE II:*** If Product Name as well as its related Test Master with Test Parameters not available in the system, then user will enter/type the Product Name as well as its Test Parameters and its rate in the provided input box manually.

***CASE III***: The amount entered in the provided input box will be the Quotation Amount for the particular Quotation.

* 1. Customer Wise Parameter-

In this Quotation Generation Process, the rate for the particular quotation will be provided according to the ITC Parameter Wise Rate (sum of total test parameter selected) entered in the system at the time of creating a Test Master. If ITC Parameter Rate not available, then user will enter the rate in each of the input box available infront of each Test Parameters.

***CASE I:*** If Product Name as well as its related Master with Test Parameters available in the system, then user will select the Product Name as well as its Test Parameters from popup window and enter/type/modify(ITC Parameter Rate) the rate in each of the input box available infront of each Test Parameters.

***CASE II:*** If Product Name as well as its related Master with Test Parameters not available in the system, then user will enter/type the Product Name as well as its Test Parameters manually and its rate in each of the input box available infront of each Test Parameters.

***CASE III****:* The sum of amount entered in each of the input box available infront of each Test Parameters will be the Quotation Amount for the particular Quotation.

***Note: Quotation will be generated only in two ways:***

* ***By combination of Product Master and Test Master available in the System.***
* ***By entering/typing the Product name and its related Test Parameters detail manually***.

1. Quotation Approval Process:
   1. Creation of Quotation Approval Master(**QAM**) according to listed fields:
      1. Role Name.
      2. Quotation Rate in range.
      3. Quotation Discount in range.
   2. If any Quotation has been created, then its approval User will depend on the condition defined/matched in Quotation Approval Master (**QAM**).i.e. the role name, Quotation rate range and Quotation Discount range should satisfy together.
   3. According to the Quotation Approval Master (**QAM**), the newly created Quotation will be visible to the dashboard for one time Approval as well as multiple times approval depend on the number of times, Quotation declined by the Customer.
   4. If the customer disapproved the Quotation, user may modify the existing Quotation based on the Customer Requirement and the modified Quotation will be reassigned to the User for approval according to the condition defined/matched in the Quotation Approval Master (**QAM**).
2. Quotation Approval Dashboard-
   1. Implementation of new Quotation Windows-Disapproved Quotation Window and Approved Quotation Window for listing of all Quotations.
   2. All the disapproved / Approved Quotation will be displayed on the dashboard according to the role name and condition defined/matched in the above Quotation Approval Master (**QAM**).
   3. If any user approved the Quotation, then it will be removed from the disapproved Quotation Window to Approved Quotation Window.
3. Creation of Sample Receiving No. of approved Quotation.
   1. Once the Quotation finalized by the Customer, it is called as PI.
   2. Registration of Approved PI by generating the Sample Receiving Code:
      1. Changes on Sample Receiving Window:
         1. Integration of New Fields Approved PI (Select Box): While generating a sample receiving code, a new select box field will be added in the form called ‘**Against Approved PI’**.
         2. If any user has selected the any option from the fields ‘**Against Approved PI’,** then ‘sample receiving code’ will be generated against the Approved PI and all the information of selected Approved PI will be attached to that ‘sample receiving code’.
4. Booking of Order by Approved PI:
   1. Booking of order by selecting the Approved PI attached in the Sample Receiving Code.
   2. If a particular select the Sample Receiving Code and that Sample Receiving Code belongs to the Approved Quotation No. then, the detail of approved Quotation will lies on following cases:

***CASE I:*** If Approved Quotation No. has been generated by selecting the Product Name as well as its Test Parameters available in the system, then it’s the related information will be populated in the order form.

***CASE II:*** If Approved Quotation No. has been generated by entering/typing the Product Name as well as its Test Parameters manually, then it’s the related information will not be populated in the order form, user has to select/enter all the detail by taking the reference of particular approved Quotation No., just like the current order booking process.

* 1. Generating / Saving of Order by clicking the Save/Save More Button.

1. Connecting the Approved PI/Quotation to Invoice Section.
   1. Integration of New Colum ‘**PI Involved’** in the pending invoice listing window of Invoice Generation.
   2. Displaying of PI/Quotation No. in the Colum ‘**PI Involved’**.
   3. On clicking **PI/Quotation No.** of the Colum ‘**PI Involved’,** it will display the Quotation detail in a popup window.

**Discussion Points:**

* How can we close the approved Quotation in order to restrict the user from re-generating the Sample Receiving Code?
* Can we generate multiple sample receiving using any particular approved Quotation?
* Will the Term & Condition Section static or dynamic (Master Creation).
* What will be the format of Quotation No.?

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