**CRM & QUOTATION CREATION MODULE**

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

* Enquiry to have Description of requirement and Not Item and Parameters from Masters.
* Enquiry Form as Per – (lets call it Annex EN-1) – TO BE PROVIDED BY ITC
* One Enquiry to have More than 1 Item.
* One Enquiry may have items from various departments like food pharma.
* There will be one and only one Sale Person attached to Enquiry

Notes:-(a) Description of Requirement contains Department ,Regulation, Sample, Parameter,   
 Instrument name etc.

(b) Enquiry also have some time limit for the conversion to quotation. If time limit   
 exceeds a mail will be shared with higher authority.

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 or its data/log to be maintained.
* Status can be Open/Won/Lost/Hold there will be reason for Won/Lost/Hold Enquiries.

Notes:- (a)Status of Enquiry will be updated per item wise.

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 Followup Details

Notes:-(a) Pop ups for reminders on user dashboard for next follow up date.

User is not allowed to   
 log out the system until the follow up will not be taken.

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 Slab Wise (0-5, 5-10, 10-20 etc) i.e. if 0-5 residue are tested then Rate will be Rs. K**

**Notes:- This slab will be applicable for the categories in which pesticide names are defined.**

**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 no.

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

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

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

Point to be discussed :-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**

Item wise Quotation part can be finalized. I.e. each item in a quotation is a separate sub.no and will have status

Quotation Status(Item wise) will be

* Open
* FInalised and Won (Order can be against this only provided the date vailidity 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 reopend if date is expired or a New Quotation is finalized for that item for that customer.**

**Point to be discussed:-:- Validity date will be applicable for finalized quotations or for all quotations.**

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

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 more than 1 Product*

Quotation to have expiry Date

**Discount System.**

Only Item wise %age discount can be given If Discount on all Items even then system will store it Itemwise.

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

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

Discount Slab -> List of Authorised 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 Authorised 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.
* Test Parameter name, instrument,detectorname,no. of injections,testmethod,test time to be taken ,NABL scope will be defined in enquiry form corresponding to the test parameter
* Linking with Inventory is not in Present Scope as Inventory Module is not there to track the availability of chemicals, colums and standard while the creation of quotation.
* Option to copy quotation for an Item from Another Quotation (All ParamertseTc will be copied)

**PO TRACKING…….**

**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 Frm 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

Quotation to have Multiple items – Multiple departments

Each Item to have different Discount Structure & Different Pricing Structue

A Common Term and Conditions for whole Enquiry

Each Item to have a Sub terms and conditions

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.

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