**Scope-2: LIST OF TASKS**

**Date: 12.06.2018**

**(1) Order Booking Cancellation:-**

**-Present**: - Order Booker have provision to cancel the order.

-**To Incorporate**: -

* Cancellation Type - Vendor or In-house- Selectbox
* Reason of Cancellation-Textarea
* Saving of Cancellation record in a separate table ‘*order\_cancellation\_dtl’*

-**MIS Report**: - For Detail of Cancelled Samples Department wise

-**Selection Criteria**: From Date & To Date (*Order Booking Date wise*]

-**Fields to be displayed**:

* Order Booking Date
* Customer Name
* Customer Place
* Sample Name
* Batch No.
* Order Booking No.
* Cancellation Type (Vendor or In-house)
* Cancelled Date
* Cancelled Time
* Stage of Cancellation
* Cancelled By
* total for no. of samples cancelled

**-Steps:**

* When any user click on a cancel button, then a popup will appear having a fields Cancelation type in a Selectbox and Reason of cancelation in a Textarea with a save and close button.
* When user click on save button, then cancellation record will be saved in a separate ‘*order\_cancellation\_dtl’ table.*
* Using the ‘*order\_cancellation\_dtl’,* the above MIS-Report will be generated*.*

**(2) Order Confirmation Mail:-**

**-Present: -** Order confirmation mail is sent to the customer automatically after the scheduling.

**-To incorporate: -** Along with the order confirmation mail standard template of report(without having value in result, Part B & Part D) will be sent to the customer as an attachment.

**-Time to send: -** At every 1 Hr.

**-Cron-Job Implementation**-For Sending Mail

**-Steps**:

* Saving of Mail in a separate table when any order moves from scheduling to testing.
* Implementation of CRON-JOB on a server.
* Sending mail from that table in a chunk at every 1 hr. using CRON-JOB.
* Saving the final mail notification in an *`order\_mail\_dtl`* table.

**(3)Provision of Section Incharge for reviewing of report:-**

-New role will be incorporated for:

* Chemical Lab
* Instrument Section
* Microbiological

- Instrument names will be defined for every section incharge whose parameters will be reviewed by them.

-Section Incharge Signatures (Chemical Lab, Instrument section) will not be displayed on Final report. Only signatures of Microbiologist will be displayed on those reports, which have microbiology parameters in it.

-Section Incharge have provision to revert any corresponding parameter to the analyst.

- After reviewing of report by the section incharge report will be sent to Reviewer.

-Further process flow will remain the same.

**-Steps:**

* Implementation of New Role ‘*Section-Incharge’* with provision to define the Equipment Types.
* When any report completed its testing, then the report will move to the Section incharge where he/she can able to review only that section of Test Report assigned to that section Incharge i.e. only that parameter having the equipment related to the Section Incharge.
* If a section incharge finds any error in the test report, then he/she can revert that parameter to analyst.
* When an analyst corrected the error of Test Report, then again it move to the section incharge.
* When the Section okay the Test Report (Parameters), then it moves to the reviewer.
* After that, process flow will remain the same as before.
* Section Incharge Signatures: Signatures of Chemical Lab/Instrument section Incharge will not be displayed on Final report. Only signatures of Microbiologist will be displayed on Test Reports having microbiological Equipment in it same as before.

(4) **New Report Template of Textile:**

- Format is attached for reference.

(5) **New bill format of Andhra/Telangana:-**

-Format is attached for reference (New Invoice PDF Design).

**-Points to Consider:**

(a) Basic Rate: rate defined in the invoicing structure.

(b)Service Tax: - Calculated tax value of sample saved in invoicing structure

(c) L1 Final Amount: - sum (a) + (b)

Tax Slab:-

(a) Within Haryana - SGST -9 % and CGST -9 %

(b) Outside Haryana -IGST -18 %

(6) **Customer Wise TAT**:-

-In customer master (customer Defined Structure) add new col. to define TAT is Editable or Not. Depending upon the value in Customer master if TAT is Editable then Expected Due Date of that customer in order booking will be Blank and order booker have provision to add no. of days of TAT (mandatory field for the customer having editable TAT value in customer master), on the basis of which system will calculate the Expected due Date of that sample.

**-Steps:**

* New column implementation in customer defined structure `is\_tat\_editable`.
* If Yes, then expected due date will be displayed in an order booking form in a input type asking for no. of days and will be enter by the Order booker and will be required.
* If No, then expected due date of that order will be calculated in background like before.

(7) **VOC (Voice of Customer):-**

-On the end of month, an auto generated will be sent to all the customers from CEO Desk containing the detail of samples of that month and a feedback form to be filled by the customer.

The sample detail fields are as follows:-

* Sample Name
* Order Booking Date
* Expected Due Date
* Report Date
* TAT (in days)
* Within TAT or Before TAT

-In Summary:

No. of samples Within TAT Performance (in %)

-In the end, feedback form will be merged.-send as attachment for reference

**-Steps:**

* Implementation of Cron-Job on Server.
* Sending of Auto generated Mail to the customer from CEO Desk with listed detail:
  + Sample Detail-fields mentioned above.
  + Summary- fields mentioned above.
  + Excel attachment provided by client.

**(8) MIS Reports:-**

**(b) Amended Reports:-**

-List of amended order with their count of amendment department Wise.

-Selection Criteria: From Date & To Date (**Order Booking Date Wise)**

Fields to be displayed: -

* Order Booking Date
* Customer Name
* Customer Place
* Sample Name
* Batch No.
* Order Booking No.
* Count of Amendment
* Total no. of reports amended.

**-Steps:**

* Saving of amended order detail in a separate table ‘order\_amended\_dtl’
* Generation of MIS-Amended Report using above table with above columns.

**(c) Sales Report by accounts for reconciliation of invoices:**

- Format attached for reference.

- In this single MIS report we contains

* daily sales invoices,
* Invoice Full Cancel with Ref.,
* Credit Partial Amount Note With Ref,
* Credit Partial Amount Note Without Ref.,
* Debit Note with Reference depending upon their document type.

-In this report the detail value of cancelled invoices will be in '-' form.

**-Steps:**

* Generation of Sales Report according to the document provided.

**(d) Report to calculate value of delay reports, released report, delay % &:-**

-Report in excel format attached for reference.

**-Steps:**

*Brief explanation required mainly about each column listed below:*

* *Number of Reports Due (29.05.2018):-*

***Reply****:- If we take 29.05.2018 as an example then no. of samples whose expected due date is 29.05.20158*

* *Number of Reports issued (29.05.2018)*

***Reply****:- No. of reports approved on 29.05.2018*

* *Delay*

***Reply****:- Formula is in excel sheet*

* *Delay %*

*Reply:- Formula is in excel sheet*

* *Number of Delay reports before (29.05.2018)*

***Reply****:-Reports having expected due date < 29.05.2018 & still pending(not approved yet)*

* *Report Issued as on (29.05.2018)*

***Reply****: Reports issued on 29.05.2018 whose expected due date <29.05.2018 (reports released from delay reports*

* *Delay*

***Reply****:- Formula is in excel sheet*

* *Delay % (S.No - 5-6)*

***Reply****:- Formula is in excel sheet*

* *Advance report issued(29.05.2018)*

***Reply****: Reports issued(approved) on 29.05.2018 whose expected due date > 29.05.2018*

* *Total Pending Reports*

***Reply****:- Formula is in excel sheet*

* *Total issued as on (29.05.2018) (Delay+Due)*

***Reply****:- Formula is in excel sheet*

* *Total Issued report*

***Reply****:- Formula is in excel sheet*

* *Total Issued %*

***Reply****:- Formula is in excel sheet*

* *Delay %*

***Reply****:- Formula is in excel sheet*

(e) **Export to Excel Button on master forms**: **(18 Hrs.)**:

- Already have on some forms but data export to excel is incomplete.

**-Steps:**

* Excel Download on listed Master Data:
* Testing Product Categories
* Testing Products
* Equipment’s
* Methods
* Detectors
* Parameter Categories
* Parameters
* Testing Standards
* Product Tests

(f) **Daily Sales Report**:-

- Format attached for reference

- Report will be generated on daily basis for all departments.

-Detail of fields is as follows:-

-**Select ion Criteria**: - From Date & to Date

(a) No. of Reports Booked: - No. of samples booked in that corresponding date.

(b) Reports Billing: - No. of reports billed in that corresponding date.

(c) Billing amount: - sum of sample amount of that corresponding date (after discount and before tax value).

**-Steps:**

* Generation of MIS-Sales Report for all departments according to the excel doc provided by the client with listed fields:
* No. of Reports Booked: - No. of samples booked in that corresponding date.
* Reports Billing: - No. of reports billed in that corresponding date.
* Billing amount: - sum of sample amount of that corresponding date (after discount and before tax value).

**(9) Reminders or Pop-Ups Role wise:**

-Reminders will be in form of pop up and will come with updated value on every 3 hours.

**-Sample Receiver: -** (a) No. of samples received department wise  
 (b) No. of samples booked department wise

**-Order Booker :-** (a) Count of sample received   
 (b) Name of customers whose samples not booked yet  
 (c) No. of samples booked user wise

**-Scheduler**: - (a) Count of booking: Count-Sample wise & Parameter wise  
 (b) Pending for scheduling: Count-Sample wise & Parameter wise  
 (c) Scheduling Completed: Count-Sample wise & Parameter wise

**-Tester:-** (a) Total pendency till date - Instrument wise sample & parameter count  
 (b) Total Completed - Instrument wise sample & parameter count

**-Reviewer: -** (a) Total pendency for reviewing till date  
 (b) Total completed

**-Finalizer:-** (a) Total pendency for reviewing till date  
 (b) Total completed

**-Approval to QA: -** (a) Total pendency for reviewing till date  
 (b) Total completed

**-Invoicer: -** (a) Total Pendency: - Count of Daily and Monthly  
 (b) Total Generated: - Count of Daily and Monthly

**-Dispatcher: -** (a) Total Pendency: - Count of Daily & Monthly  
 (b) Total Generated: - Count of Daily & Monthly  
**-CRM: -** (a) Count of Total Pending Reports till date   
 (b) No. of reports Due  
 (c) Reports Completed: - Today Due & Previous due   
 (d) List of clients whose samples not received from last 15 days

**-Steps:**

* Implementation of Popup window on the right corner of the Header Section of the Software for all Roles listed above and with all details.
* In addition, this popup will be updated after every 3 hrs. and will notify the users.

**(10) Digital Signature**:-

-Apply digital signatures on printing of report for all departments & Branches.

**-Steps:**

* Implementation of Digital Signature of printing of Report on all branches(Panchkula and Chennai) and all department(Food,Pharma,Ayurvedic,Textile,Building,Environment,Helmet)

**(11) Printing of Reports**:-

-Provision of printing of no. of sets of reports by the ERP for a corresponding invoice.

**(12) Small Amendments**:-

1) In Sales-Generate Invoices window add one more cols of Invoicing to (name of Customer invoice will be generated).

2) Provision of change of Customer name by the Administrator if the receiver will do the receiving on wrong name.

3) In Customer master for individual customer, GSTIN will be B 2 C.

4) Master -Default Remarks: - Incorporate Date in this master form, as if there is any change in existing remark then this change will not be reflected in previous reports it will be reflected in upcoming reports.

5) Employee Master: - Provision to make employee status active or inactive in case employee left organization. Provision to upload signature of employee in the employee master.

6) Incorporate new column of Date of Completion & Date of Scheduling of parameter in Scheduling Jobs Form & in selection criteria data will be fetched for Select Status (all status Completed, In-completed, Pending) also.

7) Amendment of Report: -

In amendment of report, two changes are required which are as follows:-

a) In case of amended report after adding prefix "A" we are changing Date of completion to Current Date and Report Date remains same. Please change this along with the change in Date of Completion; Report Date will also be changed to current Date.

b) Date of report, Date of completion and date on signatures will be changed only in the condition when reviewer will select the checkbox of amendment otherwise no date will be changed in case of amendment.

8) In Pharma report during auto emailing the color of "Standard Quality" stamp will be green for (Andhra Pradesh Medical Services & Telangana).

**(13) Report Format of Chennai:-**

- Format attached for reference

**-Steps:**

* Implementation of Single Page Report for Food and Environment.
* Provision for User to select the report Template Part-Wise or Single Page at the time of Generation of Invoice.
* Adding of Checkbox ‘Without Partwise report’ condition in the Report Generation Popup window.
* If User checked the Checkbox ‘Without Partwise report’,then the Single Page Report will be generated.
* Else the Partwise Test Report will be Generated.

**(14) Cancellation & Regeneration of Invoices:-**

**-** Process flow of cancellation is attached

a) Credit & Debit Note Generation Invoice wise:

- Format of Credit & Debit will be same as invoice.

b) Cancellation types :-

i) With Reference :- For those invoices generated in ERP

ii) Without Reference: - For those invoices which are not generated in ERP but should be cancelled and regenerated in current date. Make provision to add detail of invoice manually for cancellation and releasing credit Note.

c) The format of Notes will be as follows:-

i) Invoice Full Cancel with Ref : SR-00001

ii) Credit Partial Amount Note with Ref : CN-00001

iii) Credit Partial Amount Note without Ref : CNWO-00001

iv) Debit Note with Reference : DN-00001

**(15) Signature of Reviewer & Finalizer on every page:-**

**-**Signature of Reviewer & Finalizer on every page of test report for all department and all branches in footer Section.

**-Steps:**

* Implementation of Signature of Reviewer and finalizer on each page of Test Report in a footer section.
* This will be applicable in Test Report of all department.

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