**Scope-2-LIST OF TASKS-30.05.2018**

**(1) Order Booking Cancellation (24 Hrs.):-**

**-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 (*Please specify the column name for filtering*)[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

**(2) Order Confirmation Mail (32 Hrs.):-**

**-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: -** Please decide

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

**(3)Provision of Section Incharge for reviewing of report (24 Hrs.):-**

-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.

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

- Format is attached for reference

(5) **New bill format of Andhra/Telangana(18 Hrs):-**

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

(6) **Customer Wise TAT (18 Hrs.)**:-

-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.

(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. o samples Within TAT Performance (in %)

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

*(Form fields detail required or if possible please provide a sketch of dummy form).*

**(8) MIS Reports:-**

(a) DOD Report (Environment)-Date of Disposal of sample:-

- Provide detail after discussion

(b) Amended Reports:-

List of amended order with their count of amendment department Wise **(18 Hrs.)**.

Selection Criteria: From Date & To Date (*Please specify the column name for filtering*) **[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

(c) Sales Report by accounts for reconciliation of invoices **(24 Hrs.)**:

- 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.

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

-Report in excel format attached for reference.

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

* *Number of Reports Due (29.05.2018)*
* *Number of Reports issued (29.05.2018)*
* *Delay*
* *Delay %*
* *Number of Delay reports before (29.05.2018)*
* *Report Issued as on (29.05.2018)*
* *Delay*
* *Delay % (S.No - 5-6)*
* *Advance report issued(29.05.2018)*
* *Total Pending Reports*
* *Total issued as on (29.05.2018) (Delay+Due)*
* *Total Issued report*
* *Total Issued %*
* *Delay %*

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

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

(f) **Daily Sales Report:** : **(24 Hrs.)**:

-(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).

**(9) Reminders or Pop-Ups Role wise(48 Hrs):**

-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

**(10) Digital Signature (18 Hrs.)**:-

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

**(11) Small Amendments (18 Hrs.)**:-

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

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

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

- will be sent tomorrow.

**(13) Signature of Reviewer & Finalizer on every page (18 Hrs.):-**

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

**(14) In amendment of report, two changes are required which are as follows (24 Hrs.):-**

-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.

-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.

*(Please clarify: Changing the report date will also change the report no of order. Also Please specify the departments where these changes will be Implemented.)*