**TRF Task Process Flow**

**Steps involved in TRF Creation to Order Booking:**

A) TRF Creation through Customer Portal by Customer.

B) Saving/Listing/Editing/Deleting (Activating/Deactivating) of TRF Data by Customer in Customer Portal after login.

C) Saving/Displaying of Customer TRF data on CRM dashboard in ERP Software.

D) Generation of Sample Receiving Code using generated TRF by Customer.

E) Creation of Order by Selecting the Sample Receiving Code against the generated TRF.

F) Displaying of TRFs, POs and STPs to the User according to their Role by Administrator in Current Report listing page.

G) Provision to Upload/List/Delete Raw Data (Image, Graph, PDF) with respect to the corresponding Order by Employee in its Login.

H) Provision to List/Download Raw Data (Image, Graph, PDF) by Customer in its Login.

I) Provision to display AR. Bill no to the Customer in order detail page if status of Order is dispatched.

**Detail:**

1. **TRF Creation through Customer Portal by Customer:**
2. Designing of TRF Form with listed fields:
   1. Branch Selectbox
   2. Department Selectbox
   3. Test Standard Selectbox
   4. Product Category Selectbox
   5. Sub Category Selectbox
   6. Product Name Selectbox
   7. Test Master Selectbox
   8. Test Parameters Checkboxes
   9. Supplied By
   10. Manufactured By
   11. Mfg. Lic. No.
   12. Batch No.
   13. Batch Size
   14. Sample Qty
   15. D/M
   16. D/E
   17. ReportingTo and InvocingTo Selectbox
   18. Sample Storage Condition checkboxes.
3. Creation of TRF Form Data through With Master Data: In this, the TRF will be generated with the help of Master data available in an ERP.
4. Creation of TRF Form Data through Without Master Data: In this, the TRF will be generated manually by the User by entering all the available records (required fields) in TRF form.
5. Mailing of TRF Data to the Customer.

***Notes:***

***Auto Mail will be sent by taking Customer email of ERP Software.***

1. Integration of DOM PDF and PDF Generation of the TRF Data on Customer Portal.

1. **Listing/Saving/Editing/Deleting of TRF Data by Customer in Customer Portal after login:**
2. Generation of TRF Number in a format ‘TRF-YYMMDDSerial’. (As discussed with Client-Removed Division and Department)

***Note :- Reference of branch & department will be included informat of TRF no.***

1. Saving of TRF Data on Customer Portal.
2. Listing of TRF Data as a web Orders in Admin-end, Employee-end and Customer-end.
3. Editing/Updating of TRF Data by Customer if Customer itself adds it. If edited, then information will be also updated in ERP Software. TRF Data will be edited only if its sample receiving code is not generated.

***Note :-***

***TRF Data will be edited only if its sample receiving code is not generated.***

***TRF will be edited by the customer until report is not released.***

1. Deleting of TRF Data only if its sample receiving code is not generated and it is added by the Customer Itself. If deleted by customer then information will be also deleted from ERP Software.

***Note :- No provision to delete the TRF, status of TRF will be changed in customer web portal but data will be retained in the database.. Editing of TRF will be applicable until the report was not released.***

***In case of editing of TRF if customer adds new parameter in TRF then this information will be displayed on CRM dashboard until the parameter was not included in corresponding order booking.***

***In case of editing of sample information by the customer in TRF, changes will be reflected in corresponding order booking-Excluded from Scope as discussed.***

1. **Saving/Displaying/Tracking of Customer TRF data on CRM dashboard in ERP Software:**
   1. Saving of TRF Data in ERP Software.
   2. Displaying of TRF Data to CRM Role Users on its dashboard.
   3. Tracking of TRF Data, regarding its sample receiving code is generated or not.
2. **Generation of Sample Receiving Code using generated TRF by Customer:**
   1. Adding of New Selectbox ‘TRF Number’ on Sample Receiving Add Form.
   2. Adding of New Selectbox ‘TRF Number’ with selected value on Sample Receiving Edit Form.
   3. Add Form: If User select the ‘TRF Number’ from Selectbox at the time of Adding Sample Receiving Detail, then Sample Receiving Code will be generated against the selected TRF Number and TRF Number will be closed. No more Sample Receiving Code will be generated using the consumed TRF Number.
   4. Edit Form: Editing of Sample Receiving with TRF Number. ***[Branch,Departmnet,TRF No and Customer Name are not editable]***
   5. Listing: Displaying of TRF Number in New Column ‘TRF Number’ on Listing window of Sample Receiving.

***Notes:***

***MIS: - In Daily booking detail one column. Of TRF will be included to track how many samples are booked corresponding to TRF.***

1. **Creation of Order by Selecting the Sample Receiving Code against the generated TRF:**

On Selecting the Sample Receiving Code on Order Booking Form, the attached TRF Data will works in following ways:

1. There will be a separate button on the order listing page with listed colors:
   * Red Upload Color :It means neither TRF nor STP has been uploaded by the Order Booker/Admin
   * Blue Upload Color: It means TRF or STP has been uploaded by Order Booker/Admin
2. Uploading of TRF, PO,STP PDF Files:

* TRF Uploading:

TRF in the form of PDF format will be uploaded while booking an order by Order booker.

***Note: - The option to upload TRF will remain open always until the user will not upload the required document.***

* PO Uploading:
  + **Central Location** :

There will be a central Location where one person will upload the entire PO given by the Customers.

* Provision for uploading of POs in central location
* Listing of the entire uploaded PO.
* Deleting of uploaded PO for any change.
  + At the time of Uploading, the PO in the PDF format will be connected to the uploaded PO placed on a central location.
  + At the time of Invoicing, Invoicer can able to see the all connected PO of all Orders.

***Note:***

***(1) While uploading the PO customer, user will define the PO No., PO files,PO Dates & PO amount so that system will compare the PO amount with the samples invoiced corresponding to that PO and define the status of PO automatically. Status of PO will be displayed in center location as alert.***

***(2) Administrator have provision to define the listing of document role wise.***

* ***Client Discussion Point:***
* ***Master Form(Add/Delete):***
  + ***Customer name***
  + ***place***
  + ***PO No***
  + ***PO file***
  + ***PO date***
  + ***PO Amount***
  + ***PO Status***
* STP Uploading:
  + Uploading of STP PDF Files while booking an order by Order booker.

***Note: - STP will be uploaded from center location customer, sample name, and STP No. wise. During booking system will display the complete lists of STP’s as per STP no.’s customer & sample wise. Order booker has to select the required STP from the listed STP’s on dashboard.***

***Client Discussion Point:***

***Master Form(Add/Delete):***

* + ***Customer name***
  + ***place***
  + ***Sample name***
  + ***Stp no***
  + ***Stp file***
  + ***Stp date***
  + ***Stp Status***
  + Provision to upload sample image -Excluded from Scope as discussed, as it required Digital Camera at booker System.
  + NEW Steps:
  + **Central Location** :

There will be a central Location where one person will upload the entire STPs given by the Customers.

* Provision for uploading of STPs in central location
* Listing of the entire uploaded STPs.
* Deleting of uploaded STP for any change.
  + At the time of booking an Order-by-Order Booker, the related STPs as per the Customer and Sample name will be displayed to the Order Booker in Selectbox where he/she will select the required STPs. This will be a manual process of selecting STP by Order booker at the time of Booking in Current Order Form.

1. Booking of Order with TRF Number created using Master Data of System:

In this Process, the TRF data will be populated in the order form in their corresponding fields.

Order booking will fill the remaining data of the Order Form.

On clicking the save button, the Order will be booked with respect to TRF Number Data.

1. Booking of Order with TRF Number created without using Master Data of System:

In this Process, the TRF data will not be populated in the order form in their corresponding fields.

Order Booker has to first create the Test Master for the related TRF Number Data.

Then, will fill the remaining data of the Order Form.

On clicking the save button, the Order will be booked with respect to TRF Number Data.

1. **Displaying of TRFs, POs and STPs to the User according to their Role by Administrator in Current Report listing page:**
   1. Displaying of uploaded TRFs related to particular order on Order Listing page with New Column ‘TRF Image’ and on clicking the TRF Image Column, the TRF Image will be open in a Popup window.
   2. Displaying of uploaded POs related to particular order on Pending Invoice Listing page (On Generate Invoice Window) with New Column ‘PO Image’ and on clicking the PO Image Column, the PO Image will be open in a Popup window.
   3. Displaying of uploaded STPs related to particular order on Report Listing page with New Column ‘STP Image’ and on clicking the STP Image Column, the STP Image will be open in a Popup window.
2. **Provision to Upload/List/Delete Raw Data (Image, Graph, PDF) with respect to the corresponding Order by Employee in its Login:**
   1. Uploading of Raw Data with raw\_data\_name and raw\_data\_file.
   2. Listing of Raw Data.
   3. Deleting of Raw Data.
   4. Downloading of Raw Data.
3. **Provision to List/Download Raw Data (Image, Graph, PDF) by Customer in its Login:**
   1. Listing of Raw Data.
   2. Downloading of Raw Data.
4. **Provision to display AR. Bill no to the Customer in order detail page if status of Order is dispatched:**
   1. Saving of dispatch detail from ERP Software to Web Portal.
   2. Displaying of dispatch Detail on order detail page of Admin as well as Customer Login.

NOTE: Editing/Modification of TRF will be applicable by the Customer until the TRF Number is not converted in Order Number. I.e. TRF Number is converted into Order Number.

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