**Process Flow -Hold Provision {224 Hrs.}**

1. **Hold Provision: [56 Hrs.]**

(a). One standard list of "HOLD" options will be displayed to the user to be maintained by Administrator. If in the standard list value "Others" will be displayed then one text box will be displayed to the user to define the reason

**Step-1:**Add Hold list submenu under Master menu.

**Step-2:** Perform Add,edit,delete,update and sorting searching on hold master.

**Step-3:** Show list of hold reason in order module.

**Hold Reasons are:**

1. GST Number.
2. Credit Notes.
3. Others

(b). **During booking,** when sample will be kept Hold then system will not ask for test selection. Test Parameters will be selected at the time of Unholding the sample.

**Changes in order form while implementing new hold provision:**

**(1). Add/Edit Order changes:**

**Step-1:** Show a dropdown containing list of hold reasons.

**Step-2:** Choose hold reasons:

1. . If hold reason is “Others”:

\* Show a text box, type reason of hold into text box.

\* Save hold reason into order\_master .

1. . If hold reason is “GST Number”:

\* Update GST number in customer master.

\* As GST number update order status change from hold to unhold.

\* Again check GST number updation at the time of approval(QA) of report.

1. . If hold reason is “Credit Notes”:

\* Unholding the sample ,system asks for either the cheque no. & date.

\* Show a text box in popup for cheque number and a date picker for cheque date.

**Step-3:** If users select hold option, system does not ask for parameters selection.

**Steps:**

(1). Save only order information into database .

(2). If order is in hold status, do not show edit button on order listing.

**Step-4: In edit order,** remove hold provision.

**Step-5:** Save hold reason in order\_master table in database.

**Step-6: During hold, a**n Order confirmation mail will be sent to the customer specifying the reason of Hold.(mail send using cron-job)

**Step-7: During unhold,** again a order confirmation mail will be sent to the customer describing the new expected

due date of sample on unholding the sample.

**Steps:**

(1). Show a window, like edit window and save test parameter as currently working.

**Step-8:** If a sample is not "Unhold" within 3 days then reminder mail will be sent to the customer.(cron-job)

**(c). Hold at any stage:[24 Hrs]**

A dashboard will be provided to CS(CRM team to hold the sample at any stage after booking along with a text box to define reason in it.Hold current stages are as follows:-

**(1).** CRM can hold any order at any of the following stages:

\* Scheduling

\* Testing

\* Section Incharge

\* Reviewer

\* Finalizer

\* Approval to QA

**Step-1**: A hold button appears in orders listing for admin and for CRM.

**Step-2**: Click on button, a popup appears containing a text box. Specify the reason inside it.

**Step-3**: Save hold reason into the database.

**Notes:**

1. Calculation of new Expected Due Date according to unhold date.
2. Every time mail sent to customer when order is hold.
3. **S**ent mail contain information of Holding & Unholding of sample(Option of sending automail at the time of holding & unholding a sample will be optional and will be selected by CS)

**Step-4:** Hold order is not visible for the next stage from where this get holded by CRM.

**(d). MIS**

**Step-1:**  **New MIS of hold samples with their detail.**

\* Search Criteria :- Branch Name, Department Name, Hold Date From ,Hold Date To

**\*** Fields in reports are :- Booking Date, Customer Name,Place ,Sample Name,Batch No.,Expected Due Date,

Stage of sample,Hold Date ,Unhold Date ,Reason.

**Step-2:**  **TAT Report :-**

\* Using the Hold at any stage option the "H" status will be reflected in column of active stage of sample.

\* One new column of Hold reason will be added to TAT.

1. **Accounts Related Task:-[35 Hrs]**

(a) Incorporate Branch code in invoice no. i.e. 01 for panchkula & 02 for Chennai. his change will be applicable from one specific date and will not be implemented in existing invoices.

**Step-1:** Insert branch code in invoice number as in report generation.

**Branch codes:**

1. 01(Panchkula)
2. 02(Chennai)

Example: E01-1812052076 (panchkula).

**Step-2:** No change on previous generated invoice numbers.

(b) Category of Customer :- In customer master category of customer for the GST no. will be defined. The categories are as follows:-

**Step-1:** Create GST a table in database for category master.

**Step-2:** Insert GST categories records into table (customer\_invoicing\_category)

**Categories List below:**

1. Individual -> B2C
2. Overseas -> OVERSEAS
3. SEZ -> SEZ
4. GSTIN -> Applicable

**Step-1**: If category indivisual, then compare text written in text box is that B2C.

**Step-2**: If category Overseas , then compare text written in text box is that Overseas .

**Step-3**: If category SEZ , then compare text written in text box is that SEZ .

**Step-4**: If category GSTIN, then apply state validation rules on text written inside text box..

**Step-3:** Save GST category in customer master.

**Step-4:** In case while generating invoice, No tax slab is applied in case of overseas & SEZ

(c) Reason of Cancellation of Invoice :- Reason of Cancellation and approved by & approved date will be entered by the invoicer before the cancellation of Invoice.

All the three fields will be reflected in Account sales Detail.(part of MIS)

**Step-1:** Show a popup containing information regarding cancelling a invoice ,reason for cancelling,invoice name, invoicing date.

**Step-2:** Save record into invoice\_cancellation\_dtls table.

1. **New MIS :[18 Hrs]**

One New MIS displaying the status of order confirmation mail,test report mail, voice of customer mail ,hold samples confirmation mail, unhold samples confirmation mail,invoice mail etc. The fields in the report are as follows:-

**Step-1:** Fields in reports are :- In all except Voice of Customer Booking Date, Customer Name,Place ,Sample Name,Batch No**.,**Expected Due Date, Emailed Date & Time, With Attachment(Y/N),Email address

**Step-2:** Search Criteria :- Branch Name, Department Name, Emailed Date From ,Emailed Date To

&

In Voice of Customer field in reports will be customer wise sample and customer wise summary

**Customer wise sample :-** Order booking No,Sample Name, Order Boking Date,Expected Due Date & Report Date, TAT(in days) ,Within TAT(Y/N).

**Customer wise summary :-** Customer Name,Place,Sample Count, Within TAT,Performance(in %)

1. **Ammendment Provision :-[30 Hrs.]**
2. One standard list of "**Ammendment**" options will be displayed to the user to be maintained by Administrator. If in the standard list value "Others" will be displayed then one text box will be displayed to the user to define the reason.

**Step-1:** Create amendment master.

1. Add

2. Edit/Update

3. Delete

4. Sorting&Searching

**Step-2**: A popup appears while click on amend report button.

**Step-3:** A dropdown of amendment option displayed. Save record into database.

**Step-4:** If user select “Others” from dropdown. A text box appear. Type reason of amendment into it.

**Step-5:** Save record into oad\_amended\_reason in order\_amended\_dtl table.

1. **In TAT report** :- One column of ammended report will be added in TAT displaying date of ammendment and will display "P" in corresponding pending stage. On completion of ammended report, ammended report completion date will be displayed in another column. New column of reason of amendment.

**Step-1:** New column for amended report will be added in TAT report containing amendment date.

**Step-2:** Display “p” in case of pending stage.

**Step-3:** After completion of amended report,completion date will be visible in report.

**Step-4:**New column in TAT report containing amend reason.

1. **In MIS of ammenment :- [18 Hrs]**

**Search Criteria :-** Branch Name, Department Name, Ammendment Date From ,Ammendment Date To

**Fields in reports are** :- Booking Date, Customer Name,Place ,Sample Name,Batch No**.,**Expected Due Date, Stage of ammendment,Ammended Date ,Reason,Ammended Completion Date.

**Step-1:** MIS generation

**Fields in reports are** :- Booking Date, Customer Name,Place ,Sample Name,Batch No**.,**Expected Due Date, Stage of ammendment,Ammended Date ,Reason,Ammended Completion Date.

**Step-2:**

**Search Criteria :-** Branch Name, Department Name, Ammendment Date From ,Ammendment Date To

1. **Expected Due Date Change :- (?)[16 Hrs]**

No scheduler have right to change the due date after scheduling.Provision is enabled to CS and **system will track complete log of expected due date**. Auto mail will be sent to customer on the change of expected due date(Provision to send mail will be optional and selected by CS).When CS will change the expected due date of sample then system ask for the reason to change.

**Step-1:** Remove expected due date for scheduler.

**Step-2:** CRM can change expected due date.

**Step-3:** Auto mail sent to the customer regarding expected due date change(optional )

**Step-4:** For CRM, while changing expected due date a popup opens for changing Expected due date with reason .

1. **Small Queries :- [32 Hrs]**
2. Cloning of existing one test master into other test master.(Need to check same method,test standard)

**Step-1:** Cloning involves,only test parameters of same department and of same branch.

**Step-2:** Process is: Parameters of a test parameters can be copied into another test parameter.

1. Branch code in holiday master.(This change is reflected in expected due date calculation.Expected due date calculation is done on the basis of branch holiday)

**Step-1:** Include branch code dropdown in holiday master in add & edit holiday.

**Step-2:** Expected due date for each order can be calculated according to branch holidays.

1. If test time(in days) is zero in parameters of selected test master then system will show alert to order booker before booking.

**Step-1:** Check if test parameter days count is 0 then show alert message to the users.

1. Dynamic report -For Order Booking, Test Report & Invoicing(under analysis- finalize after discussion with Drish)
2. In Pharma asterisk symbol for samples at the time of invoicing having value in Real time stability note.

**Step-1:** In case of pharma invoice, if order contain real time stability note then show (\*) astrike symbol over the invoice name.