**SCOPE-II**

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

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

**To Incorporate** :- Cancellation Type - Vendor or Inhouse

Reason of Cancellation

**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 Inhouse)  
 Cancelled Date  
 Cancelled Time  
 Stage of Cancellation  
 Cancelled By

**(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 & PartD) will be sent to the customer as an attachment.

**Time to sent :-** Please decide

**(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 dislpayed 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 back any corresponding parameter to the analyst.

- After reviewingof 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**: Format is attached for reference.

(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.

(7)**VOC(Voice of Customer)-** On the end of month a autogenerated mail 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.

(8) **MIS Reports:-**

(a) DOD Report(Environment)-Date of Disposal of sample - Provide detail after discussion

(b) Ammended Reports:- List of ammended order with their count of ammendment 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 Ammendment

(c) **Sales Report by accounts (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.

(e) **Export to Excel Button on master forms**:- already have on some forms but data export to excel is incomplete.

(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).

(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

**(10) Digital Signature** :- Provision of digital as well as manual signature to be selected by the dispatcher at the time of printing of report.

**(11) Printing of Reports**:- Provision of printing of no. of sets of reports by the ERP for a corresponding invoice .(brief was discussed with Parveen earlier)

**(12)** **Small Ammendments** :-

(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 receiving will be done on wrong name by the receiver.

(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 organisation. 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,Incompleted,Pending) also.

(7) **Ammendment of Report** :- In ammendment of report,two changes are required which are as follows:-

(a) In case of ammended 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 ammendment otherwise no date will be changed in case of ammendment.

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

(13) **Report Format of Chennai.**

**(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.

(c) Cancellation types :-(a) With Reference :- For those invoices generated in ERP

(b) 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.

(d) 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 Referance :- DN-00001

(15) Signature of Reviewer & Finalizer on every page of test report(for all departments & branches).