+ Add Template

Select Category ⌄

Personal

stare

Car

CT Scans

Personal

test report
asfdafdasfs

Create   View   Report

fsdfds
safdsfds

Create   View   Report

stare

test template for budget
test template for budget

Create   View   Report

Template main screen which shows all templates

Car

terms & conditions for template
test

Create   View   Report

template customer acceptance
test

Create   View   Report

milestone
asfsfsfsadf

Create   View   Report

test template sequence
test

test template for contract creation
test

test template for milestone
test

Contracts

Choose The Type Of Template

◉ Create a Template for

◉ Digital Marketing Services	○ SW Services	○ General
○ House Keeping Services	○ Milestone	○ Marketing Services

○ Consulting	○ IT Services	○ Entity
○ RealEstate Services	○ Equipment Maintenance	○ Financial Services

First step is to select the type of Template

Contracts

○ Acceptance once Customer Pays the Invoice

○ Customer will Sign-Off

○ Acceptance once Contract is created

Cancel   Previous   Next

What is the acceptance criteria. We have 3 types

Contracts

Template Information

CONTRACT TITLE *	STATUS *	Draft
TEMPLATE NUMBER	CURRENCY	Bulgarian leva (лв.)
CONTRACT TYPE		

CATEGORY*

SUBCATEGORY*

Description

END OF TERMS BEHAVIORS	NOTICE TERMS	
DURATION*	Year	PROLONGATION DURATION*	Year

Main page where we can create the main contract details

Home   Contacts   Contracts   Templates   Maintenance Plans   Equipment   Control Panel   Entities

Contracts

1-10 of ‹ ›

Serial No: -

Brand: Schindler

Category: Lift

Sub Category: Personal

Product Name: Personal Lift

Product Model:
Price:

VIEW DESC   Modify

Serial No: -

Brand: Mitsubishi

Category: Lift

Sub Category: Personal

Product Name: Escalter

Product Model:
Price:

VIEW DESC   Modify

Serial No: -

Brand: Kone

Category: Lift

Sub Category: Personal

Product Name: Floor Lift

Product Model:
Price:

VIEW DESC   Modify

Cancel   Skip Asset   Previous   Next

This will be applicable only if the contract is tied to any asset/equipment, else we skip

Add events to Contract

- Audit
- Calibration
- Certification
- Consumables
- Improvement Work
- Lubrications
- On Condition Work
- On Demand Visits
- Planned Visits
- Planned Work
- Repairs
- Spare Parts

No Events available yet in this Proposal

Choose the Service Types on the left and create – Service Events

These are the charge capture things. These will be created as services in the master data to reflect here. Every industry will have their own nomenclarute, for eg : for healthcare we may have appointments, health check, yoga, nutrition kind of thing. This is master data driven and should be set for any industry

Cancel   Previous   Next

ADD - Calibration

×

CALIBRATION COVERAGE	Unlimited 〇 Limited
QUANTITY OF CALIBRATION*	− 2 +
CYCLE OF CALIBRATION IN DAYS*	25
SELECT CALIBRATION TO BE COVERED*	milestone calibration

enter event name to search

COST PRICE*	₹	500
SELLING PRICE*	₹	700

Cancel   Save

When we try adding a service item, we have these options. Unlimited means unlimited qty. here we have 2 qty. cycle says no of days. So here we have 2 items with 25 day cycle. Which means from day of contract we will have 1st encounter on 25th day and 2nd encounter on 50th day

Contracts

Add events to Contract

Audit
Calibration
Certification
Consumables
Improvement Work
Lubrications
On Condition Work
On Demand Visits
Planned Visits
Planned Work
Repairs

# Action	Event Type / Name	Limited/Unlimited	QTY	Days	Cost Price	Sell Price
1 ✕	milestone calibration	LIMITED	1 QTY	25	₹ 500	₹ 700
2 ✕	milestone calibration	LIMITED	1 QTY	50	₹ 500	₹ 700
3 ✕	Filter	LIMITED	1 QTY	78	₹ 777	₹ 800
4 ✕	Filter	LIMITED	1 QTY	156	₹ 777	₹ 800
5 ✕	Filter	LIMITED	1 QTY	234	₹ 777	₹ 800
6 ✕	Filter	LIMITED	1 QTY	312	₹ 777	₹ 800

Total Cost Price : ₹ 4108

Total Sell Price : ₹ 4600

This is how it looks after adding, please observe days calculated as per the cycles defined

Contracts

Volume Discount

DISCOUNT	No ⬤ Yes

> We have build discounts into the service, but my experience is a bad feedback, so I would not like to have this. Instead we can have campaign or some coupon code and provide discounts

Contracts

Volume Discount

DISCOUNT	No ⬤ Yes

1.	UNIT 2 FROM	[ ]	DISCOUNT %	[ ]	+ Add

Cancel   Previous   Next

Contracts

Billing Rules

BILLINGTYPE	CYCLE	EVENT NAME	QTY	COST PRICE (₹)	SELLING PRICE (₹)	TOTAL (₹)	BILLING DATE

Gross total : ₹ 0

TAX

Net total : ₹ 0

Cancel Previous Next

Billing rules will be shown, there is a bug so data not coming, but see below how it is seen in a contract. Few on acceptance and few on milestones. You can see the date automateically made trackable. We will manage projections and automatic invoing helping managing the finances

Billing Rules

🏷️ ▾   Set Invoice

MILESTONE	MILESTONE DATE	AMOUNT(₹)	INVOICE NO	INVOICE DATE	STATUS	VIEW / EDIT / DELETE
On Acceptace	25-02-2023	₹ 580			Not Generated ▾	
On Milestone	31-05-2023	₹ 1400			Not Generated ▾	
On Milestone	03-09-2023	₹ 1400			Not Generated ▾	

Contracts

Terms & Conditions And Other Notes

TERMS & CONDITIONS   Add New

B I U S x² x₂ A T! ✎ ≡ ≡ ≡ ≡ ⇥ ⇤ ✂ ⧉ 🗑 ✐ ↺ ↻ ¶ ❝ ❞ — ☰ ☷ 🔗 ⚯

terms

HEADING FOR TEXT

asdfsfdf

Cancel   Ok

Cancel   Previous   PDF   Preview   Finish

Text blocks to type the clauses. But I guess now we can define predetermined clauses in master data and just add it

Basic difference between template and contract is – contract is assigned to someone and will have start and end date along with defined cycles of service and billing

This is how the contract view is seen, I have given you in multiple(4) screenshots

🏠 Home   🗒 Contacts   📖 Contracts   🗒 Templates   📖 Maintenance Plans   📖 Equipment   ⚙ Control Panel   📖 Entities

Jhansi

✉ jhansi@j.com
📞

📍

12

Serial No: we324

Brand: Maruti

Category: Automobile

Sub Category: Car

Product Name: J12

Product Model:
Price:

VIEW DESC   Modify

⏱   📊   🗓   📒

Available ˅

CONTRACT NO – 3232323

Breakdown Maintenance Contract

Contract Name
| first contract |

Start Date
| 🗓 Feb 25, 2023 |

End Date
| 🗓 Mar 3, 2024 |

Draft ˅

Description

+ Add

| Description |

Billing Rules

MILESTONE	MILESTONE DATE	AMOUNT(₹)	INVOICE NO	INVOICE DATE	STATUS	VIEW / EDIT / DELETE
						Set Invoice
On Acceptace	25-02-2023	₹ 580			Not Generated ⌄	
On Milestone	31-05-2023	₹ 1400			Not Generated ⌄	
On Milestone	03-09-2023	₹ 1400			Not Generated ⌄	

Lubrications

EVENT NAME			ASSIGN	DUE DATE	STATUS	ACTION
						+ Lubrications
Oil	In Progress	✏	👤	2023-05-31	In Progress ⌄	
Oil	In Progress	✏	👤	2023-09-03	In Progress ⌄	

On Demand Visits

🏷️ ⌄   **+ On Demand Visits**

EVENT NAME			ASSIGN	DUE DATE	STATUS	ACTION
Customer Visit	📄	✏️	👤	2023-11-02	In Progress ⌄	📊 ✏️

Documents

🏷️ ⌄   **+ Add**

NO	DOCUMENT TYPE	DOCUMENT NAME	VIEW / DELETE

Terms & Conditions And Other Notes

Terms & Condidtions

these are my T&C

confidencitality

daerewrer

Budget

NO	EVENTTYPE	COST PRICE (₹)	SELL PRICE (₹)	VIEW / EDIT
	Lubrications	₹ 1998	₹ 2800	👁 ✏
	On Demand Visits	₹ 350	₹ 500	👁 ✏

+ Add

Asset Watchers

+ Watcher

Watchers Will Have Readonly Access To Asset Dashoard

Asset Collaborator

+ Collaborator

Collaborator Will Have Readonly Access To Asset Dashoard

	abc +918768768766 / abc@abc.com	ACCEPTED	🗑

If you observe the contract, you see multiple blocks, basically I have divided them as components. Idea is each component will carry its own specific rules and we can create any number of blocks. These blocks are then shown in the Kanban where user can drag the blocks and save them as a template. He can change the order also if he wants. This will enable to add building blocks for any new industry or scenario which we have not comprehended and fits well into the product

value tech

✉ value@v.com
📞 +919009093233

📍 1-10-8882, value building paradise

Modify

Receiver Details

This is the contact block.l please observe in this case it is Receiver.
With us a buyer or a receiver anyone can initiate the contract

CONTRACT NO - 2

Maintenance Contract

Contract Name

sfdsfdsf

Start Date

📅 Jun 16, 2021

End Date

📅 Jun 1, 2022

Draft ⌄

Duration block, these details will come when contract is created

Description

+ Add

+ Add

Description

If there is any description of the contract

Billing Rules

MILESTONE		MILESTONE DATE	AMOUNT(₹)	INVOICE NO	INVOICE DATE	STATUS	VIEW / EDIT / DELETE
							Set Invoice
On Acceptace	Not Generated	16-06-2021	₹ 12075			Not Generated	

Billing rules.. Contracts will be having different rules. Some may be on acceptance, some may be on milestone, some may be monthly, some may be after completion... one of the most important thing in our product is we just not track the SLA of contracts, but we also maintain accounts recivables, invoicing and automations of it. During our earlier MVP, cusomers asked a feature where the payout for vendors should tracked as it is usually commission basis. Actions in the card will create invoice, view invoices generated

Calibration

EVENT NAME	ASSIGN	DUE DATE	STATUS	ACTION
Test Calibration	⊘	2021-06-20	In Progress ⌄	
Test Calibration	⊘	2021-06-24	In Progress ⌄	
Test Calibration	⊘	2021-06-28	In Progress ⌄	

+ Calibration

This is the service block, earlier you have seen that items are added into the contract, now based on the cycle and starting date of the contract, due date are already calculated, say if we 3 items with 45 day cycle, from start of contract we will have 3 contracts tasks created on 45th , 90th and 125th day automatically. This enables easy tracking and SLA compliance with dashboards and alerts

Action items you see EDIT icon, that will lead to the field agent or service personal to create the visit or service report. Explained this down in the document

Documents

NO	DOCUMENT TYPE	DOCUMENT NAME	VIEW / DELETE

+ Add

If any documents needs to be uploaded against contract

Terms & Conditions And Other Notes

Terms & Condidtions

wrerewrewrewrewrewr

Terms and Conditions or the Building blocks of Text or clauses. In the new version I was thinking if it makes sense to have Video attachment and a cover page option if possible

Budget

NO	EVENTTYPE	COST PRICE (₹)	SELL PRICE (₹)	VIEW / EDIT
	Calibration ✏	₹ 7197	₹ 10500	👁 ✏

+ Add

Just to track budgeted vs sell price. This block will not be visible for collaborators (Vendors) or customers. This block will be visible only for the person who has created the contract or admin

Asset Watchers

+ Watcher

Asset Collaborator
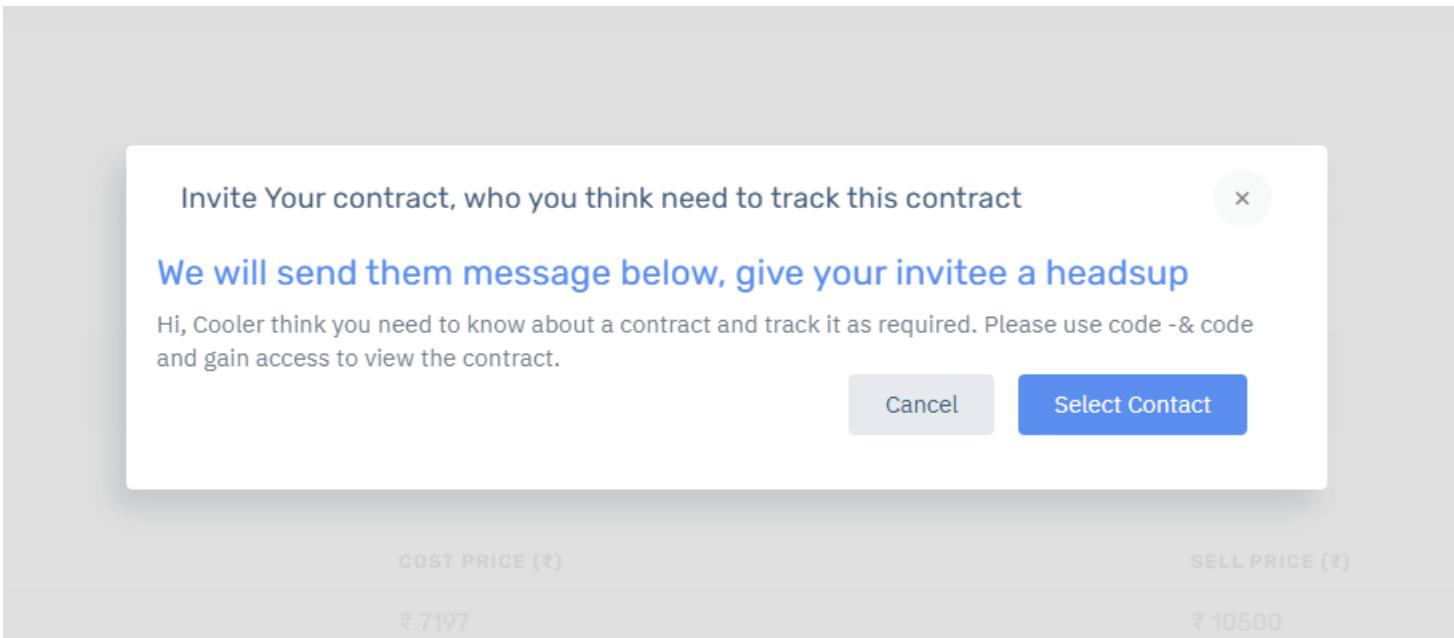
+ Collaborator

Watchers Will Have Readonly Access To Asset Dashoard

Collaborator Will Have Readonly Access To Asset Dashoard

This is where we can have watchers or colloborators added

Invite Your contract, who you think need to track this contract ✕

We will send them message below, give your invitee a headsup

Hi, Cooler think you need to know about a contract and track it as required. Please use code -& code and gain access to view the contract.

Cancel   Select Contact

COST PRICE (₹)   SELL PRICE (₹)

₹ 7197   ₹ 10500

This is how invitation is sent to access the contract

I have earlier told about service records. The next set of screens will show you how it was planned

avtar image

Janaki Ram

VIP CUSTOMER

✉ janakiram@mail.com

📞 +91 9999999999

📍 30/B49, Sector 25

IT

Notes

⊖ ⊕

B | I | U | S | x² | x₂ | A | TI | 🌡 | ≡ | ≡ | ≡ | ≡ | ≡ | ≡ | ✂ | ⧉ | 🗑 | ✏ | ↺ | ↻ | ¶ | 66 | 99 | — | ≔ | ≔ | 🔗 | 🔗 | 🖼 | ▶

ABC7761992

IST FLOOR X-RAY

Serial No: -

Brand: MyBrand

Category: Radiology

Sub Category: Mobile X-Ray

Product Name:

Product Model:
Price: INR 245888

VIEW DESC | Modify

Complaints

Equipment Malfunction	⬜	Exposure from Nearby Facility	🔵	Exposure Unnecessary	🔵	Facility Unregistered	⬜
OverExposure during treatment	⬜						

History

New Report has been received
Few sec ago

New Customer is registered
03:44PM

New Customer is registered
03:44PM

Julia's birthday on Monay, party arrangment
Monday

These are again planned as blocks, just like earlier. One of the lessons we learnt is – earlier for each line item of the service, we mapped a template, reality might be different, there might be multiple things done in a single visit and we did not support it. Just like earlier, these blocks work independently and will have their own rules. These are joined using a kanban like interface and named as a template/form. This gave us flexibility to the product to add any kind of future requirements, as we can build a block and activate it to the user

avtar image

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IT

Contact block

ABC7761992

IST FLOOR X-RAY

Serial No: -

Brand: MyBrand

Category: Radiology

Sub Category: Mobile X-Ray

Product Name:

Product Model:
Price: INR 245888

VIEW DESC   Modify

Equipment block

Documents

NAME: Name

UPLOAD: CHOOSE FILE   BROWSE

invoice
12.85kb

Contract
12.85kb

Food Grade Ceritficate
12.85kb

Block to upload documents

Complaints

Equipment Malfunction ⊗	Exposure from Nearby Facility ⬤	Exposure Unnecessary ⬤	Facility Unregistered ⊗
OverExposure during treatment ⊗			

Block to note the complaints

Causes

| Not Starting | ⊘ | Aging | ⬤ | Erratic power output | ⬤ | Filament Burnout | ⊘ |
| Inactivity | ⊘ | Slow leaks | ⬤ | Glass glazing | ⬤ | Arcing | ⊘ |

Block to know the causes

Calibration

⊖ ⊕

Parameter Value	Set Value	Obtained Value	Start Date	End Date	
	Set Value	Obtained Value	📅 Select	📅 Select	

Set Reading 1 of 3

Acceptable devaition - 12%

Parameter Value	Set Value	Obtained Value	Start Date	End Date	
	Set Value	Obtained Value	📅 Select	📅 Select	

Set Reading 1 of 3

Acceptable devaition - 12%

↑

Block to manage equipment calibrations. Please note different equipments will have different parameters and these are again defined in the master data

This is how Contacts are created/managed. I have factored every thing as a Contact and defined attributes if they are vendor or employee or some one, as we do not know to whom a contract will be given, and further, colloborators will come here only.

Contacts

Recent

---- STATUS ----

Status	Count
Contract Employee	3
Corporate Customer	2
Customer	2
Employee	1
Family Member	1
Partner	2
Service Provider	1
Vendor	1

NAME

MOBILE

CONTACT ID

USER TYPE ID

Filter ▾   Search   + New

Contacts **22**	Individuals **12**	Companies **7**
Service Provider **3**	Observers **1**	Watchers **1**

CONTACT ID	NAME | ADDRESS	CONTACT NO	EMAILID
Con/29	VALUE TECH 1-10-8882, value building paradise	+919009093233	value@v.com
Con/28	AMINO	+912323442323	amino@a.com
Con/27	VENU NEELA	+919876767689	
Con/26	DFSFDSFDSF	+913334545345432432	
Con/25	ABC	+918768768766	abc@abc.com
Con/24	JHANSI		jhansi@j.com
Con/23	GOOGLE USER	+912547153265	guser@g.com
Con/21	SOWBAL	+918800188373	sowbal@s.com
Con/20	RAVINDRA	+919898989890	ravindra@r.com
Con/19	SHASHI	+918876545678904	shashi@s.com

Contacts

New Person

Name

Called As

[flag] +91

[envelope] Enter Email

Add

Address

STREET ADDRESS:
Street

LANDMARK:
Enter a location

CITY:

STATE:

COUNTRY:

PINCODE:

CATEGORY:

☐ Observers ☐ Watchers

JOB TITLE:
--Job Title--

CONTACT ID :

description

GENDER:
--Gender--

BIRTHDAY:
📅 Select Date

PICTURE:
Choose File | No file chosen

Contact Tags

☐ Contract Employee
☐ Corporate Customer
☐ Customer
☐ Employee
☐ Family Member
☐ Partner
☐ Service Provider
☐ Vendor

Industry

☐ Accounting, Finance
☐ Advertising, PR, Event Management
☐ Agriculture, Dairy
☐ Animations, Gaming
☐ Architecture, Interior Design
☐ Automobile, Auto Ancilary, Auto Components
☐ BPO, Call Centre, ITeS
☐ Banking, Financial Services, Broking
☐ Breverages, Distillery
☐ Cememics, Sanitaryware
☐ Chemicals, Petrochemicals
☐ Construction, Enggineering, Cement, Metals
☐ Consumer Electronics, Appliances, Durables
☐ Courier, Transportation, Warehouse, Frieght
☐ Education, Teaching, Training
☐ Elecrticals, Switchgears
☐ Export, Import
☐ FMCG, Foods, Beverage
☐ Fertilizers, Pesticides
☐ Food Processing
☐ Furniture
☐ Gems, Jewellry
☐ Government, Defence
☐ Hotels, Restaurants, Malls
☐ IT-Hardware, Networking
☐ IT-Software, Software Services
☐ Industrial Products, Heavy Machinery

Amino

✉ amino@a.com
📞 +912323442323

📍

Modify

Receiver Details

Search Contract

| Dashboard |
| Contracts |
| Equipment |
| Entities |
| Billing Cycle |
| Invoices |

Amino has no interaction yet

Create a Contract
Create an Equipment
Create an Entity

A contacts Dashboard with empty state

Jhansi

✉ jhansi@j.com
📞

📍

Modify

Receiver Details

Search Contract

Dashboard

Contracts

Equipment

Entities

Billing Cycle

Invoices

💼
Contracts
1

💼
Equipments
2

💼
Entities
0

Create an contract

Create an Equipment

Create an Entity

A contacts Dashboard with data

Jhansi

✉ jhansi@j.com
📞

📍

Modify

Receiver Details

Search Contract

Dashboard

Contracts

Equipment

Entities

Billing Cycle

Invoices

View Contracts

Contract

🏷 ⌄ ▦ ⌄ 🏷 ⌄

« Previous | **1** | Next »

First Contract
25-Feb-2023--03-Mar-2024

3232323

DRAFT

BREAKDOWN MAINTENANCE CONTRACT

TagNO - 55   12

Tasks	Completed	Pending
3	0	0

Total - ₹ 3380

Paid - ₹ 0

Balance - ₹ 3380

Next Date :: Invalid Date   Skipped : 3

Customer – Jhansi

⊕ Renew   ✉ Email   📄 Report   📄 Report   ⑃ Clone   👁 View

List of contracts

List of equipments

List of entities... we named entities because we could not properly identify the nomenclature... say for eg: 1 year of Lawn Moving as a contract – Lawn is an entry. Lets say 1 year of Water treatment (cleaning of water tank) as a contract, then Water tank is an entity. Not the right nomenclature but that was the intent

Dashboard

ewrr

✉
📞 +91234444

📍
Telephone

Modify

Receiver Details

Search Contract

Dashboard

Contracts

Equipment

Entities

Billing Cycle

Invoices

Billing Schedule

ewrr has no Payments registered

Create a Contract

Billing cycle. Remember the billing rules of the contract, this contracts billing items will be seen as a card

Dashboard

Intro   ? Help

Jhansi

✉ jhansi@j.com
☎

📍

Modify

Receiver Details

Search Contract

Dashboard

Contracts

Equipment

Entities

Billing Cycle

Invoices

Invoice Schedule

« Previous   1   Next »

CUSTOMER NAME	CONTRACT NO	29-OCT-2020
Service Name	Cont-12	Rs.2890
Service Name	Cont-12	Rs.2890

CUSTOMER NAME	CONTRACT NO	29-OCT-2020
Service Name	Cont-12	Rs.2890
Service Name	Cont-12	Rs.2890

Invoices generated

Template config

Template Config

▶ Intro   ❓ Help

< **Control Panel**
Template Config

Template Name   [Template Name]

Templates

Available Blocks

Contact Baner
Asset Baner
Assign
Notes
Check List
Complaints
Causes
History
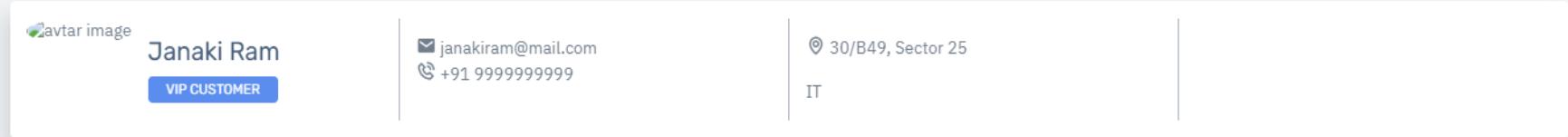
Selected Blocks

Documents configure
Calibration configure

🗑 Cancel   ▷ Create

Control Panel
Service Templates
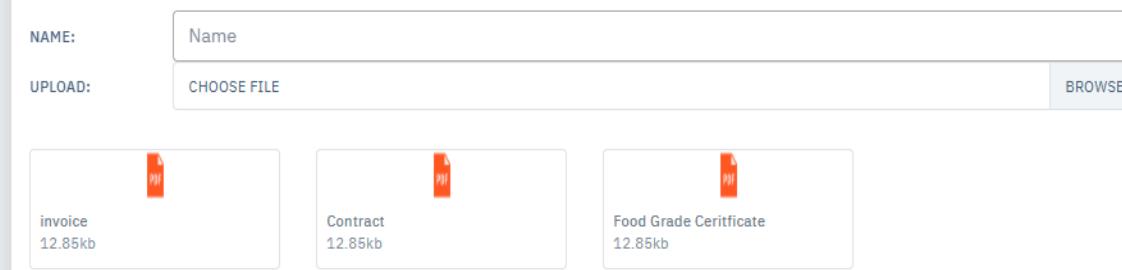
My Templates   Master Templates

Default Template Admin
Default

Base Template

clone app

![avtar image]
Janaki Ram
VIP CUSTOMER

✉ janakiram@mail.com
📞 +91 9999999999

📍 30/B49, Sector 25

IT

Notes

B I U S x² x₂ A T! 🖋 ≡ ≡ ≡ ≡ ⇤ ⇥ ✂ ⎘ 🗑 🖌 ↺ ↻ ¶ " " — ☰ ☰ 🔗 🚫 🖼 ▶

Documents

NAME: Name

UPLOAD: CHOOSE FILE   BROWSE

invoice
12.85kb

Contract
12.85kb

Food Grade Ceritficate
12.85kb

One of the lessons learnt here is, through the planning of templates/blocks etc were probably apt, but we failed to address to multiple industry. Say for eg in the contact dashboard, if the customer is a Healthcare customer, there is no sense in showing Equipments. If the customer is a Financial Services, then there is no sense of showing equipments or entities. We did not build the Finance module at that time. We managed things at Razorpay interface, but this time it makese sense to build a finance module as well