

- Lead Management
- Prospects
- Accounts
- Opportunities
- Inter Company Module
- Rised OF Request
- Received OF Request

Intercompany





























Office Request Raised List

Create OF Request

No. of Items 

7

New Link Generated and Office request form will open

Sl.No	Customer Type	Opportunity Ref. No.	BR Number	Associated Comapany	Associated Contact Person	Segment	Certification Type	DQS Contact Source	Customer Sales Executive	Opportunity Type	Product Request	State/Region	Status	Action
<a href="#">1</a>	New	O1234	50001234	TCS Pvt Ltd	Ravi Ratnakar	MSA	Cert	Cold Calling	Anisha F	Cert-InterCompany	ISO 9K	Banaglore	Request Submitted	   
<a href="#">2</a>	Existing	O1235	50002465	ABB Pvt Ltd	Thilothaman	MED	Cert	Channel Partner	Anisha F	Cert-InterCompany	ISO 9K	Coimbatore	Pending	   
<a href="#">3</a>	New	O1236	50004454	ABC Pvt Ltd	Roshni D	MSA	Cert	Social Campaign	Anisha F	Cert-InterCompany	ISO 9K	Bangalore	Request Submitted	   
<a href="#">4</a>	Existing	O1237	50002452	Sony Pvt Ltd	Kajal S	MSA	Cert	Recomendation Consultancy (Channel Partner)	Anisha F	Cert-InterCompany	ISO 14K	Chennai	Response Received	   
<a href="#">5</a>	New	O1238	50002222	Laminaar India Ltd	Hemanth P	MED	Cert	DQS Customer Referal	Anisha F	Cert-InterCompany	ISO 27K	Mysore	PO Sent	   
<a href="#">6</a>	New	O1239	50002111	Infosys Pvt Ltd	Sunil agrawal	MSA	Cert	Event	Anisha F	Cert-InterCompany	ISO 14K	Bangalore	Blocked	   
<a href="#">7</a>	Existing	O1240	50004215	V3 Novus Pvt Ltd	Laxmi mittal	MED	Cert	Mail Campaign	Anisha F	Cert-InterCompany	ISO 45K	Bangalore	Confirmed	   

[View](#)  
[Edit](#)  
[Mail](#)  
[Update](#)

Show 

10

 Entries

Opportunity Type-Dropdown

- 1.Certification - New Audit (RA)
- 2.Certification - Audit (TRA)
- 3.KSC - Facilitation
- 4.KSC - GAP Assessment
- 5.KSC - Special Assessment
- 6.KSC - Training
- 7.Certification - Inter Company
- 8.Existing Opportunity - Migration

Status List-Dropdown

- 1.Rised OF Request
- 2.Responce Received
- 3.Pendding
- 4.Tentative
- 5.Confirmed
- 6.Attaché PO/PO Received/PO Sent
- 7.Blocked
- 8.Work Order Created
- 9.Verified with PO
- 10.Task Order Raised
- 11.Reports Uploaded
- 12.Invoice Raised
- 13.Invoice Sent

Previous  3  Next

Lead Management
Prospects
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Intercompany /Office Request Form

Office Request Form from DQS Team

Information about the company:

Name and legal status of organization	KRAMSKI Lanka (Pvt) Ltd.
Site(s) ( List each address)	Phase III, K.I.P.Z. 11450 Katunayake Sri Lanka
Ref. no (s):.	064447
Parent Ref. no./	055761
Headcounts:	250 as of 05/10/2021
Local contact person:	Patel Govindlal
Phone:	
E-mail:	
Standard(s):	IATF 16949:2016
Scope:	Manufacture of straight and insert molded parts, overmoldings, stamping parts and sub-assemblies
Accreditation:	IATF, VDA-QMC

DQS contact person (leading office):	Scharmann Manuela
E-mail:	Manuela.Scharmann-Vogel@dqs.de
Phone:	+49 69 95427-385

Information about the audit

Due date:	06/08/2022
Expiry date of the certificate:	-/-
Planned dates (timeframe if available):	May 9th-11th, 2022
Type of assessment:	<div><input type="checkbox"/> Stage 1</div> <div><input type="checkbox"/> Initial audit</div> <div><input type="checkbox"/> Transfer audit (from other CB)</div> <div><input checked="" type="checkbox"/> 1 surveillance audit</div> <div><input type="checkbox"/> 2.surveillance audit</div> <div><input type="checkbox"/> Recertification audit</div> <div><input type="checkbox"/> Special audit</div> <div><input type="checkbox"/> Other assessment : </div>
Frequency of audit cycle:	<div><input checked="" type="checkbox"/> 12 month</div> <div><input type="checkbox"/> 06 month</div> <div><input type="checkbox"/> 09 month</div> <div>Others: </div>
Type of site:	Manufacturing      yes: <input checked="" type="checkbox"/> no: <input type="checkbox"/> Site:

	Remote      yes: <input type="checkbox"/> no: <input type="checkbox"/> Location:
--	---

Part of sampling procedure: If yes, date of last audit at this site:	yes: <input type="checkbox"/> no: <input type="checkbox"/>  Check if first time being audited <input type="checkbox"/>
Corporate scheme:	yes: <input checked="" type="checkbox"/> no: <input type="checkbox"/> Corporate scheme ref. no: 055761
Will there be a Corporate representative that will also attend the audit? If yes, provide contact information for the lead auditor.	Name: Email: Phone:
Design function:	yes: <input type="checkbox"/> no: <input checked="" type="checkbox"/>
Detailed calculation of audit time and current no. of headcounts:	<div><input checked="" type="checkbox"/> See attachment</div> <div><input type="checkbox"/> See individual planning in team room on intranet</div> <div><input type="checkbox"/> Has to be done by the office independently</div>
Audit language:	english
Number of audit days : (for the requested auditor / audit team):	3,0 MD
New certificate requested:	yes: <input type="checkbox"/> no: <input checked="" type="checkbox"/>
Change of current certificate:	yes: <input type="checkbox"/> no: <input checked="" type="checkbox"/>

Status

Request Submitted ▼

SUBMIT

Module

HR Management

Master List

Lead Management

Travel Management

IT Ticketing

Expenses

More

Lead Management

Prospects

Accounts

Opportunities

Inter Company Module

Rised OF Request

Received OF Request

Intercompany / Response for Office Request Form

Response for Office Request

Information about the requested auditor

Request is for:	Lead Auditor: <input checked="" type="checkbox"/>	Co-Auditor: <input type="checkbox"/>	Expert: <input type="checkbox"/>
	Or for the entire audit team: <input type="checkbox"/>		
Name and ID no. of preferred auditor(s) per role:	Pradhan, Rajendra Kumar, 20800824		
FYI only: the following auditors will also take part (name, role, office):			
Standard(s):	<input type="checkbox"/> combined <input type="checkbox"/> integrated audit		
Business sector(s):	EAC: 17.2	IAF:	
	SIC:	Others:	
Fluent language skill required:	English: <input checked="" type="checkbox"/>	Other: <input type="checkbox"/>	

Check for Auditor Availability

Select Requested Auditor

Atul D

Jai Raj

Auditor Type

Lead Auditor

Co-Auditor

+

Status

Response Recieved

Select Dates

23-2-23

25-3-23

E. A. Code

EAC 17.2

ATTACH LINK : [www.dqsbranchlink.org](http://www.dqsbranchlink.org)

SUBMIT

Module

HR Management

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Lead Management

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Lead Management

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Inter Company Module

Rised OF Request

Received OF Request

Intercompany / Confirmation on Response

Submitted From DQS India

In the Case of tentative

With Office request form details

Select Requested Auditor

Atul D

Jai Raj

Auditor Type

Lead Auditor

Co-Auditor

Status

Response Recieved

Select Dates

Start Date

End Date

E. A. Code

EAC 17.2

Status

Tentative

Tentative

Confirmed

Remark

Mention Clarification and Changes required.

SUBMIT

In the Case of Confirmed

With Office request form details

Select Requested Auditor

Atul D

Jai Raj

Auditor Type

Lead Auditor

Co-Auditor

Status

Response Recieved

Select Dates

Start Date

End Date

E. A. Code

EAC 17.2

Status

Confirmed

Tentative

Confirmed

Upload PO File

Upload PO

PO1.pdf

SUBMIT

### Inter company / Create Work Order

## Work Order Creation

## Create Work Order

### Company Additional Details

<b>Industry Sector *</b>	<b>Customer Category *</b>	<b>Employee Count *</b>	
IT industry ▼	Pvt Ltd	25	
<b>Customer Sales Executive *</b>		<b>Assign Opportunity to *</b>	
Anisha F ▼		CMT-Connect	
<b>Opportunity Type *</b>		<b>Stage *</b>	<b>Opportunity Ref. No. *</b>
Certification -New Audit RA ▼		CA1 ▼	O1234
<b>Product Request *</b>		<b>GST Applicable</b>	<b>GST Number</b>
ISO 9000, ISO 14000, ISO 27000 ▼		GST Registered	29AZOPK5661D1ZC

### SIC & Accreditation Logo Details

<b>Assessment Period *</b>	<b>EA Code *</b>	<b>Accreditation Logo Details *</b>										
Annual	EAC12,EAC 14	DAKKS										
	Multiple selection											
<table><tr><th>Select Stage</th><th>No.of Mandays</th></tr><tr><td>S1</td><td>1 Days</td></tr><tr><td>S2</td><td>2 Days</td></tr><tr><td>CA1</td><td>2 Days</td></tr><tr><td>CA2</td><td>2 Days</td></tr></table>	Select Stage	No.of Mandays	S1	1 Days	S2	2 Days	CA1	2 Days	CA2	2 Days		<b>Additional Certificates Copies</b>
Select Stage	No.of Mandays											
S1	1 Days											
S2	2 Days											
CA1	2 Days											
CA2	2 Days											
		2										

## Additional Site Details


Select Multiple Site \*

☐ BR-50001235/ TCS Pvt Ltd (P)/Chennai/South-1
 ☒ BR-50001236/ TCS Pvt Ltd (S1)/Mysore/South-1
 ☐ BR-50001237/ TCS Pvt Ltd (S2)/Hyderabad/South-1

Billing Site \*

☒ BR-50001235/ TCS Pvt Ltd (P)/Chennai/South-1
 ☐ BR-50001236/ TCS Pvt Ltd (S1)/Mysore/South-1
 ☐ BR-50001237/ TCS Pvt Ltd (S2)/Hyderabad/South-1



### Documents Rerquired

Contract Review Form *	CRF 1.pdf	<a href="#">View</a>
Basic Form *	Form.pdf	<a href="#">View</a>
GST File *	GST.pdf	<a href="#">View</a>
Company Logo File	Logo.pdf	<a href="#">View</a>
Others *	PAN.pdf 	<a href="#">View</a>
Remarks *	<p>Others Able to add multiple files according Assement/Product wise</p> <p>Fine to Proceed Further.</p>	

**Note:** Final files can be uploaded by only Connect team. If sales person uploaded files then Connect team able to view/download/edit and then Re-upload.

**Note:** Connect team can send for approval/Convert opportunity

## Document Verification

<b>L1 Verifier Name *</b> <input type="text" value="Nagaraj Joshi"/>	<b>L1 Verified Date *</b> <input type="text" value="21-11-2022"/> 	<b>Remarks *</b> <input type="text" value="Fine to Proceed Further."/>
<b>L2 Verifier Name *</b> <input type="text" value="Saravanan"/>	<b>L2 Verified Date *</b> <input type="text" value="22-11-2022"/> 	<b>Remarks *</b> <input type="text" value="Fine to Proceed Further."/>

### Quotation Details

Quotation Currency \*

INR

Slab - A Quote \*

18,000.00

Default Price reflection depends on product selection & No.of mandays

Expense Category \*

Billable

Non Billable

Accreditation Logo Cost \*

10,000.00

Comapny Logo Required \*

☒ Yes

☐ No

Company Logo Cost

5,000.00

Quote Prepared \*

Sashi D

Default Login person

Quote Prepared Date \*

22-11-2022

Default Current date

Customer Agreed Slab - A Quote \*

If No, Agreed Slab - B Quote \*

15,000.00

Agreed Slab - B Quote \*

Agreed Company Logo Cost

4,000.00

Agreed Slab - B Quote \*

Agreed Accreditation Logo Cost

8,000.00

Discount %

15

Auto Calculate

View Price Details

Accreditation Logo Details \*

DAKKS

ANAB

NABCB

UKAS

APMG

IATF

IACG

UNIFE

JAB

ESDA

SEDEX

Price Table

Pricing Spread	Year 1				Year 2	Year 3	3 Year Total	Year 4
	PE	S1	S2	Sub Total	CA1	CA2		Sub Total
No of Mandays	0	1	2	3	2	2	0	0
Audit fees before Discount	0	18,000	36,000	54,000	36,000	36,000	1,26,000	0
Audit fees after Discount	0	15,300	30,600	45,900	30,600	30,600	1,07,100	0
Customer Company Logo Fee	0	5,000	0	5,000	0	0	5,000	0
CE Marking - DAKKS	0	10,000	0	10,000	10,000	10,000	30,000	0
ISO 13485 - DAKKS	0	0	0	0	0	0	0	0

Finance & Accounting Team Approval \*

Sales & Marketing Head Approval \*

Auditor Blocked/Planning Team approval \*

☒ Yes

☐ No

☒ Yes

☐ No

☒ Yes

☐ No

Remarks

Documents are fine.

During this process, Mail confirmation required form planning team for work order creation

### Quotation Details

<b>Agreed Percentage *</b>	<b>Mutual-Agreed Percentage *</b>
<input type="text" value="75%"/>	<input type="text" value="50%"/>
<b>Remarks</b>	
<input type="text" value="Documents are fine."/>	
<div><div>Book Order</div><div>Cancel</div></div>	

**Book Order  
according to PO  
Sent**







- Lead Management
- Lead Generation
- Lead Validation
- Lead Assignment
- Lead Escalation
- Lead Conversion
- Prospects
- Accounts
- Opportunities

Intercompany / Audit Planning

Planning Audit Details

Company Additional Details

Industry Sector \*  
IT industry

Customer Category \*  
Pvt Ltd

Employee Count \*  
25

Opportunity Ref. No. \*  
O1234

Customer Sales Executive \*  
Anisha F

Assign Opportunity to \*  
CMT-Connect

Opportunity Type \*  
Certification -New Audit RA

Stage \*  
CA1

Product Request \*  
ISO 9000, ISO 14000, ISO 27000

GST Applicable  
GST Registered

GST Number  
29AZOPK5661D1ZC

SIC & Accreditation Logo Details

Assessment Period \*  
Annual

EA Code \*  
EAC12,EAC 14

Accreditation Logo Details \*  
DAKKS

Select Stage

No.of Mandays

S1  
S2  
CA1  
CA2

1 Days  
2 Days  
2 Days  
2 Days

Additional Certificates Copies  
2

Additional Site Details

Add Site

Select Multiple Site \*

☐ BR-50001235/ TCS Pvt Ltd (P)/Channai/South-1

☒ BR-50001236/ TCS Pvt Ltd (S1)/Mysore/South-1

☐ BR-50001237/ TCS Pvt Ltd (S2)/Hyderabad/South-1

Billing Site \*

☒ BR-50001235/ TCS Pvt Ltd (P)/Channai/South-1

☐ BR-50001236/ TCS Pvt Ltd (S1)/Mysore/South-1

☐ BR-50001237/ TCS Pvt Ltd (S2)/Hyderabad/South-1

Documents Rerquired

Contract Review Form \*  
CRF 1.pdf

View

Basic Form \*

Form.pdf

View

GST File \*

GST.pdf

View

Company Logo File

Logo.pdf

View

Others \*

PAN.pdf

View

Remarks \*

Fine to Proceed Further.

**Note:** Final files can be uploaded by only Connect team. If sales person uploaded files then Connect team able to view/download/edit and then Re-upload.

**Note:** Connect team can send for approval/Convert opportunity.

Document Verification

L1 Verifier Name \*  
Nagaraj Joshi

L1 Verified Date \*  
21-11-2022

Remarks \*  
Fine to Proceed Further.

L2 Verifier Name \*  
Saravanan

L2 Verified Date \*  
22-11-2022

Remarks \*  
Fine to Proceed Further.

Quotation Details

Quotation Currency \*  
INR

Slab - A Quote \*  
18,000.00

Expense Category \*  
Billable

Accreditation Logo Cost \*  
10,000.00

Comapny Logo Required \*  
Yes No

Company Logo Cost  
5,000.00

Quote Prepared \*  
Sashi D

Quote Prepared Date \*  
22-11-2022

Customer Agreed Slab - A Quote \*  
Yes/No

If No, Agreed Slab - B Quote \*  
15,000.00

Agreed Company Logo Cost  
4,000.00

Agreed Accredition Logo Cost  
8,000.00

Discount %  
15

Auto Calculate

Price Table

Pricing Spread	Year 1				Year 2	Year 3	3 Year Total	Year 4
	PE	S1	S2	Sub Total	CA1	CA2		Sub Total
No of Mandays	0	1	2	3	2	2	0	0
Audit fees before Discount	0	18,000	36,000	54,000	36,000	36,000	1,26,000	0
Audit fees after Discount	0	15,300	30,600	45,900	30,600	30,600	1,07,100	0
Customer Company Logo Fee	0	5,000	0	5,000	0	0	5,000	0
CE Marking - DAKKS	0	10,000	0	10,000	10,000	10,000	30,000	0
ISO 13485 - DAKKS	0	0	0	0	0	0	0	0

Remarks

Documents are fine.

Send Perform Invoice only for first year, If required need to send yearly basis.

View Price Details

- Accreditation Logo Details \*
- DAKKS
- ANAB
- NABCB
- UKAS
- APMG
- IATF
- JACO
- UNIFE
- JAB
- ESDA
- SEDEX

Cross verify with PO Copy and Enter Auditor and Details

Audit Planning Details

Training/Audit Start Date \*  
11-01-2023

Training/Audit End Date \*  
13-01-2023

Planning Status \*  
Audit Planned

Training/Audit Confirmed Date \*  
09-01-2023

Locked Status \*  
Open

Remarks \*

Billable - Onsite

To Approval By \*  
Dwaraknath

Auditor Assignment

Select Site \*

50251111-TCS Pvt Ltd.-Bangalore

Lead Auditor Name \*

Nagaraj Joshi

Only Qualified auditor list should be populated in Dropdown

Co-Auditor Name \*

Saravanan

Candidate Name \*

Saravanan

Trainee Auditor Name \*

Sachin

Technical Expert \*

Rakesh

Witness \*

Rajesh

Save

View Calendar

Cross verify with PO Copy and Enter Auditor and Details

Cross verify with PO Copy and Enter Auditor and Details

Site Details

Select Site \*

50251111-TCS Pvt Ltd.-Bangalore

Lead Auditor Name \*

Nagaraj Joshi

Only Qualified auditor list should be populated in Dropdown

Co-Auditor Name \*

Saravanan

Candidate Name \*

Saravanan

Trainee Auditor Name \*

Sachin

Technical Expert \*

Rakesh

Witness \*

Rajesh

Save

View Calendar

Site Wise auditor list : Like Bangalore

Lead Auditor: Nagaraj Joshi				
Day	Date	Block/Release	Duration	Standard Name
Mon	11-01-2023	Block Now	1	QM15
Tue	12-01-2023	Blocked	1	QM15
Wed	13-01-2023	Confirmed	1	QM15

Site Wise auditor list : Like Chennai

Lead Auditor: Rajesh k				
Day	Date	Block/Release	Duration	Standard Name
Mon	11-01-2023	Block Now	1	QM15
Tue	12-01-2023	Blocked	1	QM15
Wed	13-01-2023	Confirmed	1	QM15

Co- Auditor: Saravana

Day	Date	Block/Release	Duration	Standard Name
Mon	11-01-2023	Release	1	QM15
Tue	12-01-2023	Release	1	QM15
Wed	13-01-2023	Release	1	QM15

Co- Auditor: Sachin P

Day	Date	Block/Release	Duration	Standard Name
Mon	11-01-2023	Release	1	QM15
Tue	12-01-2023	Release	1	QM15
Wed	13-01-2023	Release	1	QM15





