**Introduction APP based workflow automation project:-**

Internet, Smart phone& mobile App are an integral part of our day-to-day life. With it we compute, communicate, gather news, network with friends and colleagues, and share information and resources instantaneously. Today, we see many business-large and small using websites as a platform to sell a product or provide services.

However we have realized that there is lack of free, user-friendly interfaces that independent business owner can use to operate their business online. There have many developments in the B2C segments but hardly any developments have happened in B2B segments. Few large corporates have developed their own applications which are either developed by the function heads whose priority is not the application development but managing the day to day needs of their internal customers or the application development companies, whose interest is to build an application with a fragmented approach and sell to corporate houses develop these types of applications, without going through the details of the usages. We see a larger space in these segments for workflow automation, which can help the business house to keep a track of there management processes, thereby improve service levels and efficiency of operations and also bring in visibilities.

We desire to cover the following areas in the workflow automation processes:

1. Sales module –
2. Lead Generation
3. Lead Tracking
4. Lead approvals by (??)
5. Lead Management and Conversion
6. Productivity of the sales persons
7. Productivity of the sales agents
8. Client Interfacemodule – Both Individual and Rate Contract
9. Quotation Generation
10. Quotation Tracking
11. Purchase Order Management
12. PO can be
    1. One time
    2. Rate contract for a specific period
    3. One time with an attached Agreements
13. Invoice Tracking
14. Payment Booking – Interfaced with tally or any finance tracking module
15. Pending Claim Statement with aging analysis
16. Payment history of the client
17. Service tax claim tracking
18. Vendor Interfacemodule – Both Individual and Rate Contract
19. Evaluation
20. Registration
21. Deployment
22. RFP preparation
23. Quotation
24. Comparative statement
25. Purchase Order management
26. PO can be
    1. One time
    2. Rate contract for a specific period
    3. One time with an attached Agreements
27. Bill payment
    1. With job completion certificate
    2. No claim certificate
28. Payment tracking in tally or any finance tracking module
29. Outstanding claim statement along with aging analysis
30. Service tax payment tracking
31. Cash flow wrt outstanding PO
32. Productivity of vendors
33. Productivity of the account manager of 360ISPL
34. Project tracking module – Priority 1
35. Physical Audit of assets
    1. WRT (With Reference To) Fixed Asset Register (FAR)- Excel sheet to be imported and exported
    2. Initiate Barcoding process
    3. Local print through scanner
    4. Sticking on the asset
    5. Additional assets verification process
       1. Add additional assets in the same format
       2. Initiate Barcoding of additional assets
       3. Take Local print
       4. Sticking on the additional assets
    6. Final verification with the scanner
    7. Submit revised FAR
36. Audit– Power quality, Thermography, HSE (Health, Safety & Environment), MEP (Mechanical, Electrical & Plumbing), Branding, Statutory mandates
    1. Project Scheduling to be donewrt barcoding of the Asset
    2. Resource allocation to be done
    3. Mobile authentication processes for the resources
    4. WRTStandard forms (Check list) – Excel sheet to be imported and exported
    5. Abnormal findings to be highlighted in the recommendation sheet
    6. Certificate to be generated as per the prescribed format
    7. Productivity of the Auditors
37. Preventive maintenance – MEP Asset – Same process of auditing to be followed
    1. Project Scheduling to be done wrt barcoding of the Asset
    2. Resource allocations to be done
    3. Mobile authentication processes for the resources
    4. WRT Standard forms (Check list) – Excel sheet to be imported and exported
    5. Barcoding authentication to be done
    6. Photographs to be uploaded – at least 2
    7. Consolidated abnormal findings to be highlighted in the recommendation sheet
    8. Productivity of the service personals
38. Breakdown maintenance –
    1. ***Call to be logged in by the indenter through barcode scanning through mobile***
    2. Calls to be assigned to the defined resource as per mapping
    3. Calls to be attended as per the rate contract for the existing items and new rates can be incorporated (as attached)
    4. Call tracking to be done w.r.t MIS
    5. Productivity of the service personals
39. Project Management – Any type of new project, firstly to be prepared in excel sheet and then imported in this tool, this should keep a milestone base tracking, also compare plan vs actual - Same process of auditing to be followed
40. MIS &Reporting module
41. Project specific
    1. Location
    2. Zone
    3. Category
    4. State
    5. Auditor or Service personals (Assignees)
    6. Vendor
    7. Client
42. Client specific
    1. PO
    2. Invoice
    3. Pending claims
    4. Outstanding payment with aging
43. Vendor specific
    1. PO
    2. Bill
    3. Cash Flow
    4. Pending payment with aging
44. Sales
    1. Lead
    2. Sales team conversion rates
45. Account (Client& Vendor) wise MIS

**NOTE:**

Green: New

Red: Not Clear

No Color: Exists in previous project

Light Blue: Not Possible