
Technical Structure V1.1

Transportation CRM

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Admin Area

1. Transporter Onboarding

- **Transporter Registration:** The admin fills essential data directly from the transporter, including:
 - Contact information
 - Company details (address, registration info, etc.)
 - Vehicle and fleet specifications
 - **Profile Creation in CRM**
After data collection, the admin creates a transporter profile in the CRM, entering all information into designated fields
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2. Logistics Request Management

- **Internal Job Creation**
The admin creates logistics requests or jobs based on internal data, which could include scheduled deliveries, inventory movements, or customer orders entered.
 - **Job Specification Details**
The admin inputs job details, including:
 - Pickup and delivery locations
 - Date
 - Bill No.
 - Driver Name.
 - Driver no.
 - Vehicle no.
 - Quantity details
 - Required pickup and delivery times
 - **Transporter Assignment**
The admin assigns the most appropriate transporter to the job based on:
 - Fleet capability
 - Cost considerations
 - **Transporter Notification**
Once assigned, the transporter is notified of the job details. This confirmation is updated in the CRM.
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3. Scheduling and Tracking

- **Milestone and Status Updates**
The transporter is instructed to update the CRM at key milestones (e.g., "Pickup Complete," "In Transit," "Delivered"). The admin receives real-time status updates to monitor progress.
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4. Billing and Payment Processing

- **Cost Calculation and Payment Entry**

Based on predefined rate cards or negotiated rates, in the CRM calculates the total cost of the job.

- Quantity (quintal)
- Rate per quintal
- Total Amount
- Advance Paid (This is deduction amount) (Here drop down for who is paying admin or item provider)
- TDS (IF ANY) (This is deduction amount)
- Importer Commission (This is deduction amount) (Yes or no to add amount on transporter wallet) (if yes then amount will add on transporter wallet)
- Will be received upon sending (This is deduction amount) (If there is misplace in delivered item amount will be deducted from it) (this amount will be given when driver provide proof of delivery slip)
- Market paper (This is deduction amount)
- Labour Charges (This is deduction amount) (Here drop down for who is paying admin or item provider)
- **Total Amount will show here and this will transfer to bank account of driver after completion of delivery.**

- **Invoicing and Payment Approval**

The admin generates an invoice for internal records and schedules payment to the transporter upon job completion.

- **Download Invoice**

The admin generates and print an invoice in their bill PDF.

5. Post-Delivery Checks and Reporting

- **Completion Verification**

Once the transporter confirms the delivery, the admin verifies all documentation, including proof of delivery, and closes the job in the CRM.

- **Internal Performance Rating**

The admin reviews and rates the transporter's performance based on factors like on-time delivery, condition of goods, and communication reliability.

6. Continuous Improvement and Maintenance

- **Regular Transporter Audits**

The admin periodically reviews transporter profiles, checking for updated compliance, and performance.

- **Process Optimization**
Based on CRM data, the admin assesses areas for improvement in route planning, transporter allocation, and cost management.
- **Database Maintenance**
The admin ensures all data is up-to-date and removes or flags inactive transporters to keep the CRM database accurate.

Transporter Area

1. Transporter Profile Management

- **Login**
Transporters can login through email and password provided by Admin
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2. Logistics Job Creation and Transporter Assignment

- **Job Posting by Admin**
The admin posts logistics jobs within the CRM, detailing each job's requirements:
 - The admin inputs job details, including:
 - Pickup and delivery locations
 - Date
 - Bill No.
 - Driver Name.
 - Driver no.
 - Vehicle no.
 - Quantity details
 - Required pickup and delivery times
 - **Transporter Job Notification**
The CRM sends a job notification to selected transporters, including the job details and request for confirmation.
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3. Scheduling and Real-Time Tracking

- **Route Planning and Scheduling**
The transporter confirms the pickup and delivery schedule based on the job's requirements.
 - **Milestone Updates**
Transporters use the CRM to mark key milestones (e.g., "Pickup Complete," "In Transit," "Delivered") along the route, which are automatically recorded. Admins can access milestone statuses at any time.
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4. Billing and Payment Process

- **Cost Calculation**

Based on predefined rate cards or negotiated rates, in the CRM calculates the total cost of the job.

- Quantity (quintal)
- Rate per quintal
- Total Amount
- Advance Paid (This is deduction amount) (Here drop down for who is paying admin or item provider)
- TDS (IF ANY) (This is deduction amount)
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Total Amount will show here and this will transfer to bank account of driver after completion of delivery.

- **Payment Disbursement to Transporter**

After admin approval, the payment is processed, and the transporter is notified of payment. Payment status is recorded in the CRM for transparency and record-keeping.

5. Post-Delivery and Performance Review

- **Delivery Confirmation and Close-Out**

Upon job completion, the transporter uploads proof of delivery, such as a signed delivery note. The CRM marks the job as closed once the delivery is verified.

6. Ongoing Maintenance and Reporting

- **Regular Transporter Audits**

The CRM flags transporters for regular audits, prompting them to upload updated documents and confirm details. The admin reviews compliance periodically to keep records up-to-date.

- **Reporting and Analytics**

The CRM automatically generates reports on logistics metrics like job completion rates, transporter performance, and costs. Admins can use these insights to make data-driven decisions for route optimization and transporter selection.