ramco

Ramco Aviation Solution

Version 5.7.5

Enhancement Notification

Sales

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WHAT'S NEW IN CUSTOMER?

Enhancements in Create/Edit/View Customer Record

Reference: AHBF-9490

Background

Requirements to incorporate the following capabilities in the Customer business component:

- 1. Auto-generation of Customer ID
- 2. Categorization of customers
- 3. Maintenance of additional information on customers
- 4. Designate Customer Service Representative (CSR) for customers
- 5. Links to View Customer Record in diverse business processes

Change Details

1. Auto-generation of Customer ID

A new field **Numbering Type** added in the Create Customer **Record** activity to enable users select the numbering type for automatic Customer ID generation. The **Numbering Type** field will load all Active numbering type mapped to the new transaction **Automatic Customer # Generation** in the **Maintain Numbering Privileges** activity of the **Document Numbering Class** business component. This facility has been kept optional depending on organization-preference

| | | | | | | | | | | ÷ , 🖦 | | |
|-----------------------|------------------------|-------------------------|-----------------|-------------------------|---------------|---------------------|-----------|----------------|--------------------|-------|------|---|
| | | | | | | | | Date Form | at yyyy:mm:dd | | | |
| ustomer Details | Quatemor # | | | | | Deference | Status II | oder Creation | - | | | |
| | Customer # | | | Numbering Type fie | eld to | Nere erice | Denest | nuer creation | • | | | |
| | Customer Name | | _ | aid automatic Custo | omer | Name as in | Report | | | | | |
| | conce page of de | | | | Sinci | Supple | · · · | | | | | |
| | SPEC 2000 Code | | | ID generation | | SITA / | ARLINC | | | | | |
| | Operator # | 2010-00-11 | | | | Multiple Ope | | - Deminak | | | | |
| | Registration Date | 2015:06:11 | | _ | | Engagemer | The C | n Request | • | | | |
| | Oustemer Category | | | | | Numberin | g type 🦰 | anuai | • | | | |
| py Details | Customer Category | | · · | | | | | | | | | |
| | Customer # 👂 | | | | | Sale | s Point A | VEOSOU 👻 | | | | |
| | | A | | Sales Point Information | | | | | | | | |
| | | 🔲 Main Customer Infr | ormation | Address ID Information | | | | | | | | |
| | Copy Options | Payment Receipt Ir | formation | Commercial Information | | | | | | | | |
| | | 🔲 Default Bill To / Shi | o To Informatio | on 🔲 TCD Details | | | | | | | | |
| Idress Information | | | | | | | | | | | | |
| | Address Line 1 | | | | | Address | Line 2 | | | | | |
| | Address Line 3 | | | | | | City | | | | | |
| | Zip Code | | | | | | State | | | | | |
| | ISO Country # | | | | | | Phone | | | | | |
| | Mobile | | | | | | Fax | | | | | |
| Line - Include | E-Mail | | | | | | URL | | | | | |
| dditional Details | Nature Of Ourtomer | External | - | | | | PLI | | - | | | |
| | Company Code | Excernal | • | | | Day | tear TD | | • | | | |
| | company couc | | • | | | ru | | to Gen. CO ana | net Intercompan | PO | | |
| | Nature of Relationship | Part Sale | Servic | e Sale | | | | to cen co ago | and a real company | , | | |
| | | Component Loan | Comps | onent Exchange | | | | | | | | |
| ommercial Information | | | | | | | | | | | | |
| | Credit Checking At | Customer 🔻 | | | | Customer Account Gr | oup 👂 | | | | | |
| Idress ID Details | to display] | | | | A In | | | | | - | | - |
| Address ID | Address Line 1 | | Address Lin | -2 | Herene Line 2 | | r = · | IL AI | | 717 | Code | |
| Address 10 | Address Line 1 | | Audi ess cirie | - 2 / // | Juless Line 5 | | city | | | 24 | code | |

Exhibit 1: The Numbering Type field added in Create Customer Record

Exhibit 2: The new transaction added in Maintain Numbering Privileges

| $\langle \uparrow \rangle$ | Inventory Setup 🕻 Documen | ıt Numbering Class 冫 Maintain Numbering Priv | ileges | | | | | | | | | |
|----------------------------|----------------------------|--|---------------------------------|---------------------------|-----------------|----------------|------------|-----|--|--|--|--|
| | Maintain Numbering Privile | ges | | | | II 가 좀 다 · | ⊢ ? | Č K | | | | |
| | ser Details | Org. Unit Name Aveos V User Name Ø 10099 | Get User Privileges | | | | | | | | | |
| | 4 272 - 281 / 301 ▶ | + T T. | | | Customer # | Generation X 💌 | | Q | | | | |
| # | Function Area | Business Component Name | Transaction | Numbering Privileges Allo | wed | | | | | | | |
| 272 | Sales Management | Pack Slip | Customer Goods Pack Slip | No | | | | • | | | | |
| 273 | Sales Management | Pack Sip | Customer Order Pack Slip | No | | | | * | | | | |
| 274 | Sales Management | Pack Sip | Part Sale Pack Slip | No | New transaction | | | * | | | | |
| 275 | Sales Management | Sale Contract | Commerical Id | No | for automatic | | | • | | | | |
| 276 | Sales Management | Sale Contract | Contract | No | Custamar ID | | | • | | | | |
| 277 | Sales Management | Sale contract | Track ID | No | Customer ID | | | • | | | | |
| 278 | Sales Setup | Customer | Automatic Customer # Generation | No | | | | v | | | | |
| 279 | Scrap Management | Scrap Note | Automatic Scrap Note | No | | | | * | | | | |
| 280 | Scrap Management | Scrap Note | No | | | | | | | | | |
| 281 | Service Sales Management | Customer Order Services | Customer Order Services | No | | | | • | | | | |
| | | | Maintain Privileges | | | | | | | | | |

Towards this, a new process parameter "Automatic Customer # Generation" has also added under the entity MRO Sales in the Set Sales Process Parameter activity to optionally automate Customer ID generation. The system behavior depending on the value of the process parameter "Automatic Customer # Generation" will be as follows:

- "**0**" (No): The Numbering Type drop-down list box in Create Customer Record screen displays one option only, i.e., 'Manual'
- **"1" (Yes):** The Numbering Type drop-down list box in Create Customer Record screen displays 'Manual' and, all Active Numbering Types mapped to transaction "Automatic Customer # Generation" in the Transaction Mapping screen.

Exhibit 3: The new process parameter that governs automated Customer ID generation in **Create Customer Record**

| Sales Setup > Customer > Set Sales Process | Parameters | | | | | | | | | | | | |
|---|--|--|----|----------|---------------------|--------------------|------------------|--------------|----------|---|----------------|-----|-----|
| \star 🗎 Set Sales Process Parameters | | | | | | | | | Z | Ē | (' |) [| ō K |
| Select Parameter Details | | | | | | | | | | | | | |
| Display Parameters for MRO Sales | • | | | | | | | | | | | | |
| - Process Parameter List | | | | | | | | | | | | | |
| (i i 25 - 28 / 28) → + □ 0 | ά Τ. T. | | ۶. | | \mathbf{X}_{1} | J - 10 | 00 | All | | Ŧ | | | Q |
| # Parameter for | Process Parameter | Permitted Values | | Value | Value | Selected | , | | | | | | |
| 25 🖻 Part Pricelist | Default Part Pricelist for Customer Portal | Enter a valid Part Pricelist for Part Sale | | PartSale | | | | | | | | | |
| 26 🖻 Service Pricelist | UOM Code to denote Resource Consumption in | Specify a Valid UOM code as defined in UOM | 1 | EA | | | | | | | | | |
| 27 🗉 Customer Order – Services | Round off Factor - Rate | Specify the no. of decimals to be rounded of | ff | 2 | | | | | | | | | |
| 28 🖹 Customer | Automatic Customer # Generation | Specify "0" for "Not Allowed" and "1" | | 1 | | | | | | | | | |
| New process parameter that governs automated Customer ID generation | | Set Process Parameters | | | | | | | | | | | |
| Record Statistics | | | | | | | | | | | | | |
| Create Last Modifie | d by DMUSER d by DMUSER | | | Las | Create t Modifie | ed Date ed Date | 2012:0 2015:0 | 1:07 6:11 | | | | | |

This feature helps in generation of uniform and distinctive Customer IDs. For example, Customer IDs can be defined with prefix 'CUS-' for instant identification.

2. Categorization of customers

A new field **Customer Category** added in Customer records to enable users to classify customers on the basis of organization-specific preferences, such as revenue, sales, purchases, etc. The **Customer Category** drop-down list box will load all Active categories defined against the category type **Customer Category** in the **Maintain Category Code** screen.

Customer categorization would greatly aid service providers in sales reporting and analysis.

| Customer Details | | | () | stomer Category will lo: | ad I | 圖 : | 4 雪 12 十 . | ?! |
|------------------------|---|-------------------------|------------------|---------------------------|--------------------------|----------------------------------|------------|----|
| Customer Details | | | all | Activo Catogorios dofin | od | Print Barriel | 20 | |
| | | | | Active Categories defin | eu | Date Pornat yyyymmid | 1 | |
| | Oustomer # | 1. | aga | ainst Category Type | erence Status | Under Creation | | |
| | Customer Name | 1 C | | stamor Catagory in | e as in Report | | | |
| | Parent Customer Code P | | l Cu | siomer Calegory III | Suppler # P | | | |
| | SPEC 2000 Code | | Mai | intain Category Code | SITA / ARINC | | | |
| | Operator # | | | initian category could | ple Operators? | | | |
| | Registration Date | 2015:06:11 | 10 | | Engagement Type | On Request + | | |
| | Line Vans O | and the second | L | | Numbering Type | Manual | | |
| | Customer Category | | | | | | | |
| Copy Details | | | | | | | | |
| | Customer # P | | | | Sales Point | AVEOSOU 🔻 | | |
| | | E Al | | E Sales Point Information | | | | |
| | | Main Customer 1nft | ormation | Address ID Information | | | | |
| | Copy Options | 🕅 Paymenit Receipt a | nformation | Commercial Information | | | | |
| | | 📰 Default Bill To / Shi | p To Information | TCD Details | | | | |
| Address Information | | | | | 1000000 | | | |
| | Address Line 1 | | | | Address Line 2 | | | |
| | Address Line 3 | | | | City | | | |
| | Zp Code | | | | State | | | |
| | 150 Country # | | | | Phone | | | |
| | Mobile | | | | Pax | | | |
| | E-Mal | | | | LRL | | | |
| Additional Details | 100000000000000000000000000000000000000 | a hora | 1121 | | 02.7 | 1 | | |
| | nature of customer | External | Ŧ | | BU | | | |
| | Company Code | | Ŧ | | Portier ID | | | |
| | | | The second | | E3 | Auto Gen. CO against Intercompar | 1FRO | |
| | nature of Readonarity | (Y) Pertode | (V) service of | 20 | | | | |
| Commercial Information | | [V] Component Loan | [K] Componen | nt Exchange | | | | |
| | Gredit Checking At | Customer + | | | Customer Account Group P | | | |
| Address ID Details | | | | | | | | |
| e e [No records t | to display] 🔹 😝 🔸 | - 0 + 0 0 | Τ.Τ. | A 16 | 8 X X 8 8 2 F 4 | II AI | v | |
| Address ID | Address Line 1 | | Address Line 2 | Address Line 3 | City | | Zip Code | |
| 0 | | | | | | | | |

Exhibit 4: New field Customer Category added in Customer Record screens

3. Maintenance of additional information on customers

Users can now access two new link screens from Customer Record screens for maintaining and viewing additional details over and above the customer main information.

- Edit Customer Additional Information (Linked from Create and Edit Customer Record screens)
- View Customer Additional Information (Linked from View Customer Record screen)





Exhibit 6: New View Customer Additional Information screen



Smart and tactical data modeling of Category and Attribute in **Maintain Category Code** enables users capture multi-tiered additional information against customers. For example, "Sales Channel" of a customer can have predefined values like "Inventory Locator Service" and "Word of Mouth". Subsequently, the user can key in text against "Sales Channel".



Exhibit 7: Capturing multi-tiered additional information against customers

Exhibit 8: The **Edit Customer Additional Details** screen capable of capturing multitiered additional information against customers

| Maintain Ottagony Codes | Maintain Category Codes |
|--|---|
| Provinces Category Cours | Relect totty |
| Select Inthy | |
| Entity MRO Service Sales 💌 | Search Catherin |
| - Search Criteria | |
| Category Type Customer Addl. Category V Category Code | Category Type Customerådd, Attribute V Category Code |
| Status Active V Search | Status V Sélatch |
| Category Code Details | Category Code Details |
| | |
| a Entity Category Type Category Code Description tatus Created by Created Date Last. | # Entity Category Type Category Code Description Status Prested by Created Date Last Modified |
| 1 🗉 MRO Service 🗸 Customer Addl. Categor X 🔻 1-SC 1-Sales Channel Ctive 🗸 DMUSER 05-19-2015 | 1 MRO Service v Dustomer Addl. Attributer V 1-AW 1-Able Website Active v MUSER 05-19-2015 |
| 2 MRO Service and Collection of 2 TD 2.Time of Baster Clive v DMUSER 05-19-2015 | 2 MRO Service v Customer Add. Attal v 1-11.5 1-11.5 Active v MUSER 05-19-2015 |
| 3 MRO Service V Customer Addl. Categor V 3-1 3-Affected Line of Buiness Active V DMUSER 05-19-2015 | 3 MRD Service v Customer Add Looke v 1/MM 1/World Mouth Addie v MUSER 05-19-2015 |
| 4 MRC Service V Dustomer Add. Callegor V 44 M 44Peterred Quote Method Active V DRUSER 05-19-2015 | 5 MRD Service × O Add Ambuta × 2 CM 2-Government Active × DMUSER 05-19-2015 |
| | 6 MRO Service v Concer and Attribute v 2-RW 2-Rotor Wing Active v DMUSER 05-19-2015 |
| | |
| ★ 🔋 Edit Cust mer Additional Information | |
| | Date Format yyyymmidd |
| Customer Details | |
| Customer = CUS40AH | Created A Aversou |
| Search Criteria | |
| Category 1-SC V Sales Channel | Poute 1-AW Able Website Status Active |
| | Search |
| Additional Information | |
| $(\mathbf{c} + 1 - 1/1 + \mathbf{b} + \mathbf{c}) \neq \mathbf{T}_{\mathbf{c}}$ | |
| # Category Category Category Description Attribute Sector | otion Value Notes Status Created by |
| 2 II-SC I-AW | Active V LINUSER |
| 1-LS | |
| 1 WOM | |
| | |
| | |
| | |
| | |
| < | > |
| Sa | Additional Info. |

4. Designate Customer Service Representative for Customers

Ability has been built into the product to capture Customer Service Representative (CSR) for a customer, who will be the sole point of contact for the outside world. To achieve this, the **Contact Category** drop-down list box under **Internal Contact Information** will now list following values:

- CSR with description 'Cust. Service Rep.'
- All Active Categories defined against Category Type 'Customer Internal Contact Category' in Maintain Category Code

| Sales Point | l | | | E sate | s Point Information | | 2 101 -7 10 40 | |
|----------------------------------|----------------------|------------------|---------------------|----------------|---------------------------|----------------------|----------------|---|
| Invoice Information | Default Bill To / Sh | p To Information | | | | | | |
| Automatic Invoice Authorization | No Ŧ | | | | Freight Billable | No 🐨 | | |
| Eligibility For Rebate | No + | | | | | | | |
| Tax Exempt | No v | | | Ta | ix Exempt Certificate No. | | | |
| Shipping Information | NO W | | | | No. of Invoice Copies | | U | |
| Shipping Point | AVEOSOU 🐨 | The | Contact Category | , | Shipping Method | As per routing guide | * | |
| Preferred Carrier | | | | / | Freight Term | * | | |
| Partshipment Allowed | Yes 👻 | drop- | down list box for | | Transhipment Allowed | Yes 👻 | | |
| Shipping Tol -Ve | | defin | ina unique conta | ct | Shipping Tol +Ve | | | |
| Default Address Id | | | ing unique contu | | | (And Long) | | |
| Bill to ID | NA Y | | nation |) | Ship to ID | NA ¥ | | |
| Internal Contact Information | | | | | | | | |
| 1 1 1 -2/2 b b - D + T | Τ. | | | L B B X | | IE AI | * | Q |
| Contact Category Description | | Employee # P | Employee Name | Position Title | Job Title | Department | Remarks | |
| 1 CSR V Cust. Servic | e Rep. | 00001718 | CARLUCCIO, PASQUALE | POS 101 | HM30011713 | 2115 | test | |
| 2 🖾 ISR 🐱 Inside Sales | Representative | 00001718 | CARLUCCIO, PASQUALE | POS 101 | HM30011713 | 2115 | | |
| 3 🖻 🗸 | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

Exhibit 9: Capturing designations for customers

The details of the employee defined against **Cust. Service Rep**. for a customer will flow to contracts created for that customer. Further, this capability has been extended to define more positions like Business Development Managers (BDM), Inside Sales Representatives (ISR), Regional Managers, Geo Heads, etc. for customers through Contact Categories defined in **Maintain Category Code**.

5. Links to View Customer Record in diverse business processes

The **View Customer Record** links have been enabled in the following screens across business components to enable various roles to access customer information. This feature provides direct access to Customer information avoiding unnecessary traversal across the product.

| Component | Activities | | | | | |
|-------------------------|---------------------------------------|--|--|--|--|--|
| Work Monitoring Control | Edit Work Estimates | | | | | |
| Customer Service Order | Manage Order Execution | | | | | |
| Repair Order | Create/Edit/Amend/View Repair Order | | | | | |
| | Record/View Acknowledgement | | | | | |
| | Record/View Quotes | | | | | |
| Purchase Order | Create/Edit/Amend/View Purchase Order | | | | | |

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