



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

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

Numbering Type field to aid automatic Customer ID generation

Numbering Type: **Manual**

**Exhibit 2: The new transaction added in Maintain Numbering Privileges**

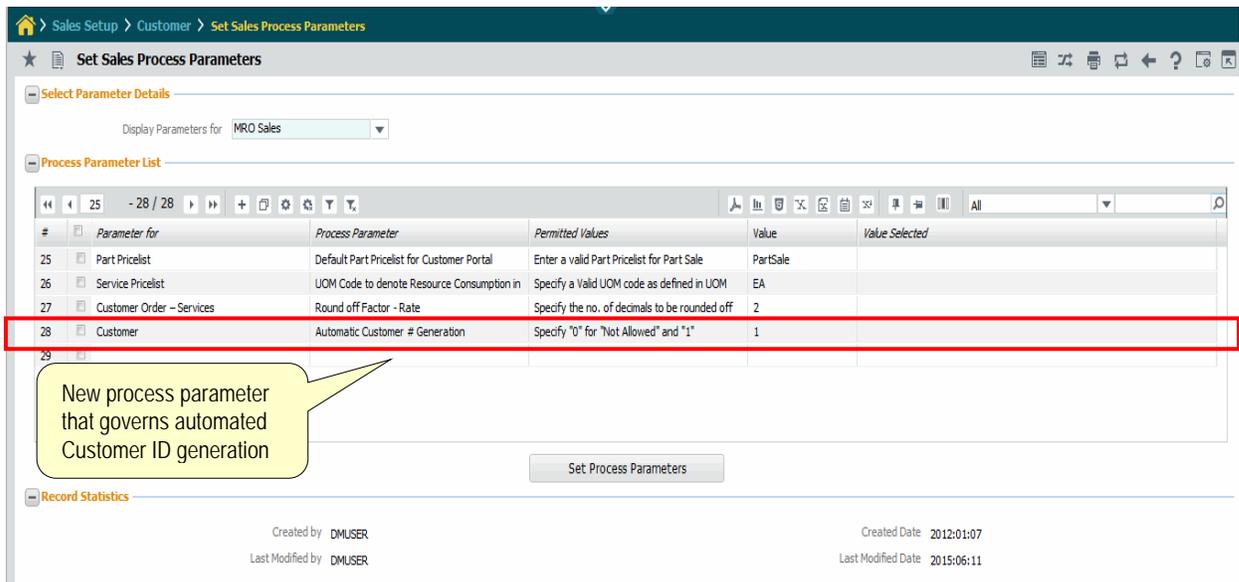
#	Function Area	Business Component Name	Transaction	Numbering Privileges Allowed
272	Sales Management	Pack Slip	Customer Goods Pack Slip	No
273	Sales Management	Pack Slip	Customer Order Pack Slip	No
274	Sales Management	Pack Slip	Part Sale Pack Slip	No
275	Sales Management	Sale Contract	Commercial Id	No
276	Sales Management	Sale Contract	Contract	No
277	Sales Management	Sale contract	Track ID	No
278	Sales Setup	Customer	Automatic Customer # Generation	No
279	Scrap Management	Scrap Note	Automatic Scrap Note	No
280	Scrap Management	Scrap Note	Manual Scrap Note	No
281	Service Sales Management	Customer Order Services	Customer Order Services	No

New transaction for automatic Customer ID

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**



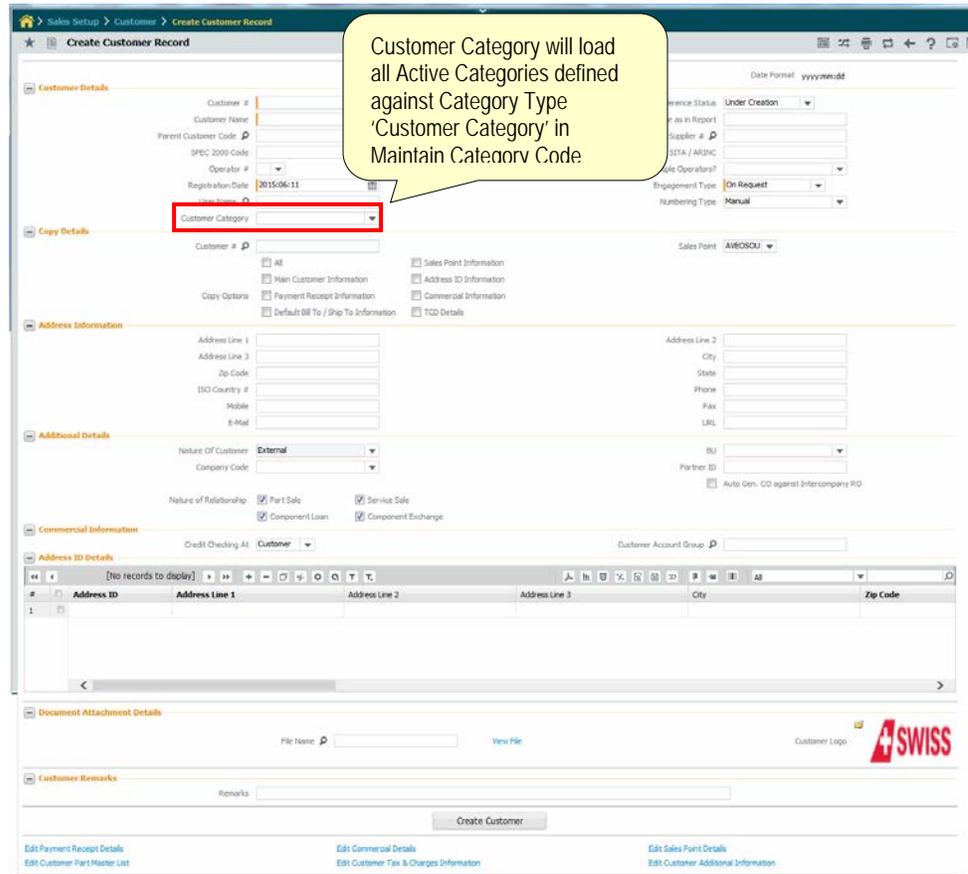
This feature helps in generation of uniform and distinctive Customer IDs. For example, Customer IDs can be defined with prefix ‘CUS-’ for instant identification.

## 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.

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 5: New Edit Customer Additional Information screen

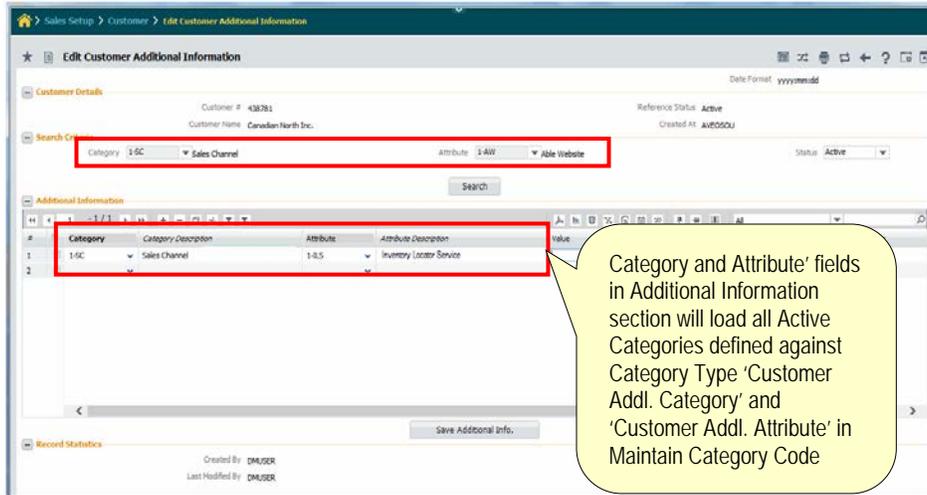
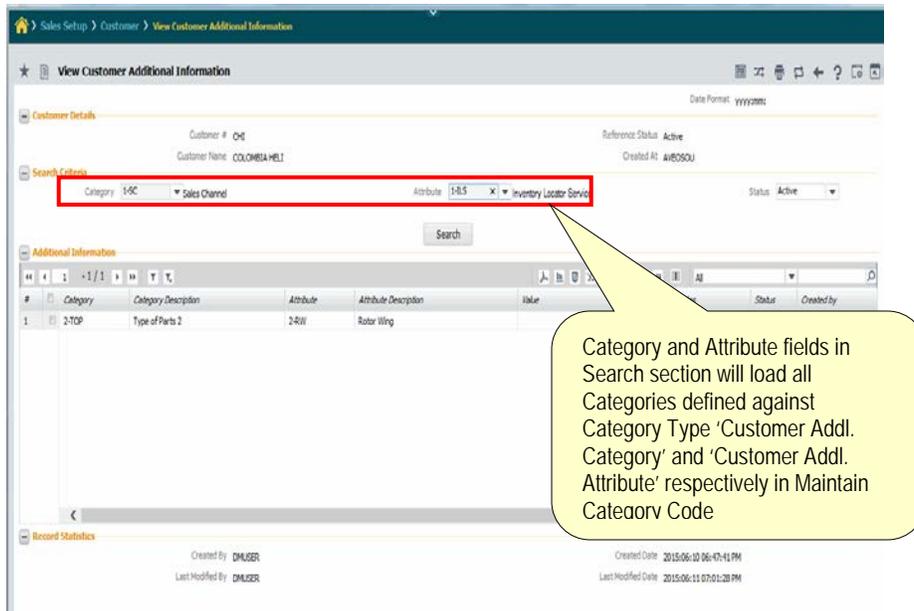


Exhibit 6: New View Customer Additional Information screen



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

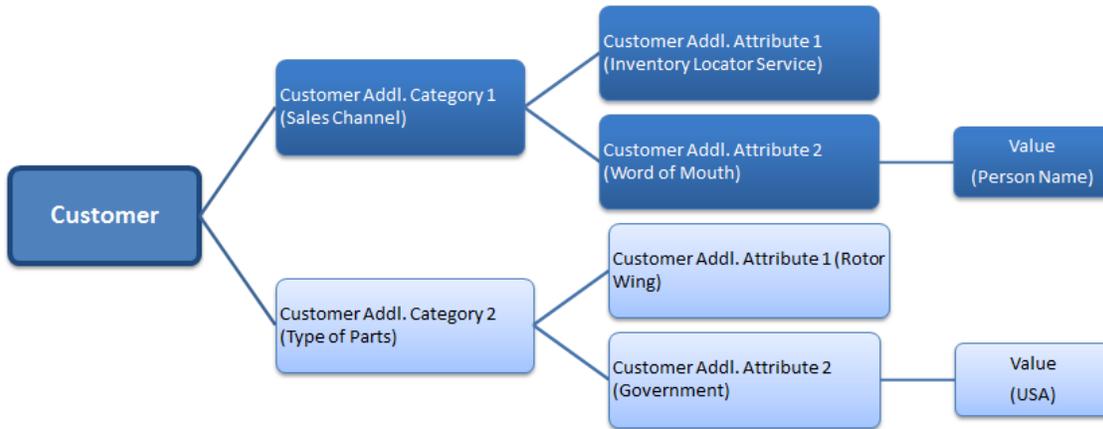
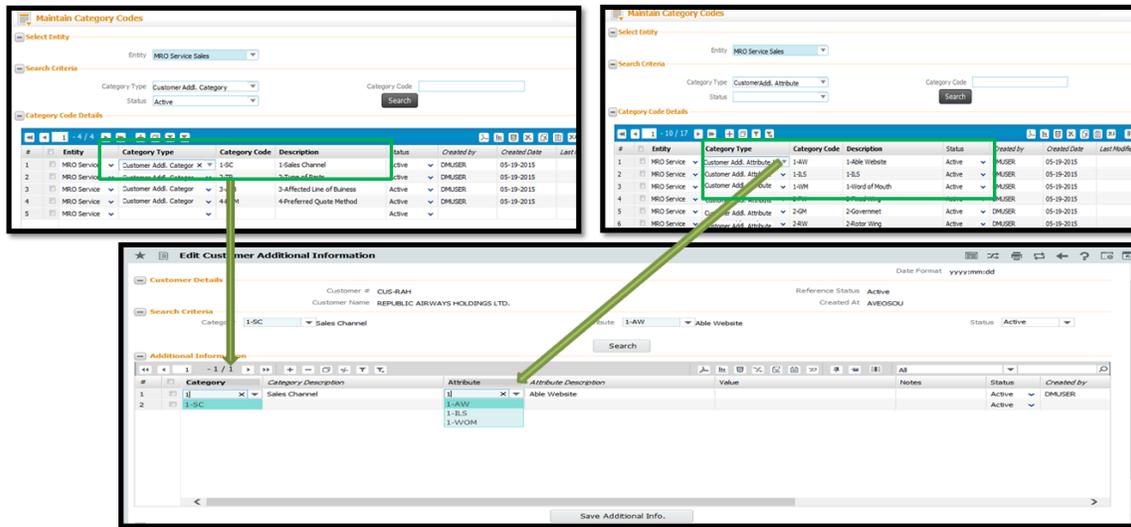


Exhibit 8: The Edit Customer Additional Details screen capable of capturing multi-tiered additional information against customers

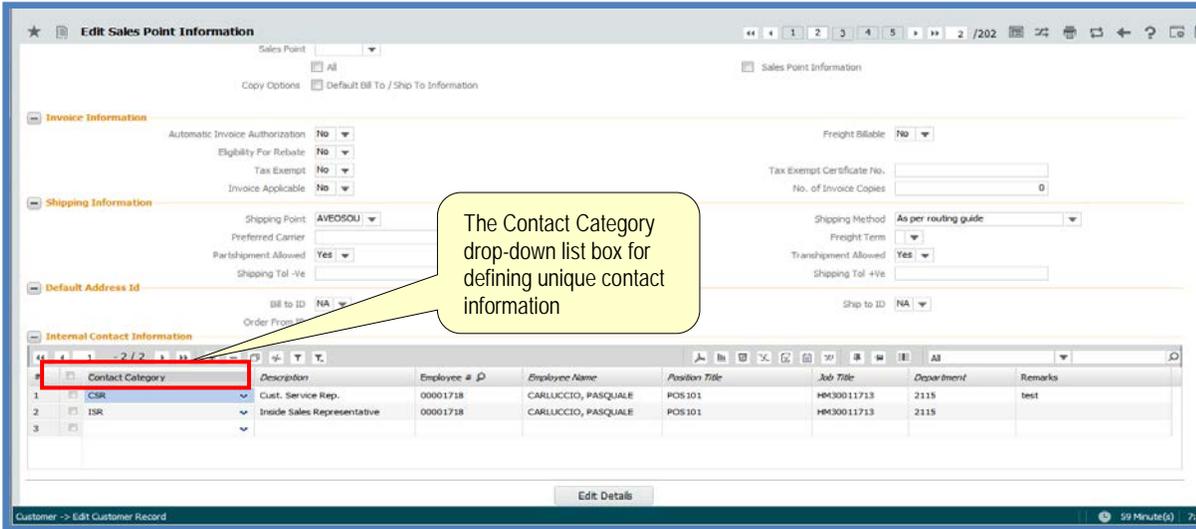


#### 4. Designate Customer Service Representative for Customers

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

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

**Corporate Office and R&D Center**

Ramco Systems Limited,  
64, Sardar Patel Road, Taramani,  
Chennai – 600 113, India  
Office + 91 44 2235 4510 / 3090 4000  
Fax +91 44 2235 2884  
Website - [www.ramco.com](http://www.ramco.com)