

# **RAMCO AVIATION SOLUTION**

## **ENHANCEMENT NOTIFICATION**

**Version 5.8.9.1**

**Commercials**

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## WHAT'S NEW IN CUSTOMER ORDER SERVICES?

### Ability to track and review jobs with provision to render a flexible framework to manage pricing within Customer Order

Reference: APRP-280

#### Background

There are various ways in which a work scope is received and executed based on the different type of business. In case of heavy maintenance jobs, like that of tasks performed on an aircraft, the work scope is generally requested by the customer for which a contractual agreement is made and signed. However, once the aircraft actually reaches a hanger, the customer may include or exclude certain tasks from the requested work. In such cases the price originally quoted is to be revised locally for the order as this does not change the standard scope agreed as per the contract.

Similarly, when it comes to component/Engine maintenance, the work requested might remain the same, but there is a possibility that the customer may select a different pricing pattern which primarily varies the inclusion and exclusion list of the work scope. This also is generally managed within the order itself.

Therefore there is a requirement to review the work scope information of an order and make modifications to pricing, in-scope /out of scope while the job is still open.

#### Change Details

A new activity **Manage Customer Order Workscope** has been added under the **Customer Order – Services** business component to help in the review and modification of the following details of tasks within the document:

- Pricing Task Ref.
- Task Pricing Basis
- In scope/Out of scope

#### The screen has the following sections:

User can provide a Customer Order # in the header (search option is available) based on which the following details of the Order # selected will be displayed:

##### 1. Header Section:

The Header section displays the main info. of the Customer Order such as:

- Order#: The Customer Order# that is provided
- Status: The Status of the Customer Order selected
- Customer #: The Customer# and name for whom the order is raised
- Contract#/Rev #: Contract #/Rev. # against which the order is evaluated

## 2. Order Additional Information

The Additional Info. of the Customer Order as given below will be displayed in this section:

- Order Applicability, whether Aircraft, Parts or Others
- Object # either Aircraft Reg. # or Part #
- Station/Primary Work Center details
- Order Priority as specified in the CO
- Order Currency as in Customer Order
- Customer PO # as in CO

## 3. Work scope Details

This section contains additional search criteria to filter/view the work scope within the customer Order based on the following:

- Exec. Doc #: The Tasks available under a specific exec. Document (either 'Shop Work Order' or 'Aircraft Maintenance Execution') within the customer order# can be retrieved by providing the Exec. Doc #
- Entity: Specific Entity like the Task#, Repair Order, Exchange Order or Service Purchases based search can also be performed to retrieve the respective details
- Pricing Task #: Search can also be performed to retrieve all the tasks# under the given Customer Order # with a particular 'Pricing Task#'
- Contracted: This will enable to search for the tasks# under the customer order which are contracted or not contracted as per the contract.
- COA?: COA based search is also available which will retrieve only the tasks with the COA marked as per the selected option.

## 4. Multiline

- Based on above additional search criteria, the multiline records will be displayed.
- If no additional search criteria are provided, the entire workscope under the Customer Order # will be retrieved.
- The system retrieves the work scope of the given Customer Order in this section after the generation of Execution document.
- All Tasks in the Execution documents both parent Exec. Doc and child Exec. Docs are retrieved in the multiline irrespective of the status.
- The COA and pricing details of the Task and its constituents are retrieved i.e., Task pricing basis, COA, Material Pricing basis and COA, Resource pricing basis and COA, Others pricing basis and COA as evaluated by the system from Contract.
- The system will also indicate the Contracted? Status against the tasks based on whether Task is a part of the evaluated contract/revision as either Work scope, or Inclusion or Exclusion.
- Modifications can be made to 'Pricing Task', 'Task – COA?', 'Task Curr Pricing Basis', FP defn. at, MAT-COA?, Resource - COA ?, Other resources – COA? against any task# and save the details.



**Note:**

1. Modifications cannot be done against cancelled tasks.
2. The Estimations requirements against the task will be updated based on the changes made against the pricing task, COA? etc.
3. The Hold requirements against the task for Estimates/Quotation will be updated against the tasks based on the modifications saved against the same in this screen
4. The Quote/Invoice Release generated against the Customer Order will be impacted based on the changes (COA, Pricing Task) made against the customer order.
5. All in scope /out of scope, pricing basis evaluation are done again based on new contract / revision, when contract re-assignment is done to the Customer Order.

**Exhibit 1:**

**Manage Customer Order Workscope activity in the Customer Order – Services business component**

The screenshot displays the 'Manage Cust. Order Workscope' interface. At the top, the breadcrumb navigation shows 'Service Sales Management > Customer Order - Services > Manage Cust. Order Workscope'. The main header includes the title 'Manage Cust. Order Workscope' and a search bar with 'Customer Order #' and 'CO-008971-2019'. Below this, a summary bar shows 'Order # CO-008971-2019 / 0', 'Order Status Processed', 'Customer # / Name 400006 / Customer 7', and 'Contract # / Rev. # FAB / 3'. The 'Order Addl Info' section contains fields for 'Order Applicability Aircraft', 'Object # C-FDQV', 'Station / Primary Work Center YUL / YUL-100-00', and 'Order Priority NRM'. The 'Workscope Details' section has dropdown menus for 'Exec. Doc.', 'Pricing Basis', 'Entity', 'COA?', 'Pricing Task', and 'Contracted'. A 'Search' button is located below these fields. The bottom section features a table with 12 columns: '#', 'Cont.', 'Entity Type', 'Entity #', 'Description', 'Exec. Status', 'Task Pricing Basis', 'Pricing Task Ref.', 'Task - COA?', 'Task. - Curr Pricing', 'FP Defn for.', and 'Tsk Incl./Excl. Notes'. The table contains 5 rows of task data. A 'Save' button is positioned at the bottom center of the interface.

#	Cont.	Entity Type	Entity #	Description	Exec. Status	Task Pricing Basis	Pricing Task Ref.	Task - COA?	Task. - Curr Pricing	FP Defn for.	Tsk Incl./Excl. Notes
1	Yes	Task	2-TASK-06052013-	Task relationship	In-Progress	T & M	2-TASK-06052013-	In Scope	T & M		
2	Yes	Task	3-OPER-06052013-	Task relationship	Planned	T & M	3-OPER-06052013-	In Scope	T & M		
3	Yes	Task	3-OPER-06052013-	Task relationship	Planned	T & M	3-OPER-06052013-	In Scope	T & M		
4	Yes	Task	3-OPER-06052013-	Task relationship	Planned	T & M	3-OPER-06052013-	In Scope	T & M		
5	Yes	Task	3-OPER-06052013-	Task relationship	Planned	T & M	3-OPER-06052013-	In Scope	T & M		

## Ability to modify the Part # and Quantity in Customer Order before receiving the part

Reference: APRP-655

### Background

In Component Maintenance services, customers may send out requests to MROs for required services ahead of sending the unserviceable core and MROs would register an order for the incoming part. While the order may be placed on Part # on receiving the part, the Part # in the receipt or part tag may be different as it could be a variant. Hence while receiving the part, the requirement is for a provision to modify the Part # or its quantity in the Customer Order until the Part is received.

### Change Details

A new parameter as mentioned below is available in the **Set Sales Process Parameters** activity under 'MRO Sales' on launch of the screen. This parameter governs whether the modification of Part # and quantity. is allowed in Customer Order till the main core part is received against the Customer Order. 'Part #' and 'Qty' can be modified for a CO when a CO is in 'Approved' and 'Processed' status as well only when the parameter 'Allow Modification of Part # & Qty in Customer Order' is defined as 'Allowed' with certain conditions.

#### Conditions:

- Modifications to Part # and Qty. are allowed only if no Goods Receipt have been created with reference to the Customer Order #.
- Modified Part # should be evaluated against the already available Contract against which the Customer Order is evaluated and generated.

#### Impact Details:

- Modified Part # in the Customer Order is updated in the 'New Part #' column to its corresponding Main Core Shop Work Order in the **Record Part # / Serial # Change** screen once the CO has been approved and Goods Receipt is generated.
- Modified Part # is updated to the Part # information in 'Part Effectivity' section under 'CO Maint. Obj.' tab of **Manage Sale Quotation** screen for an already setup Quote, both Customer and Warranty Quote after Approval of Customer Order
- Modified Part # is updated to the Part # in Search Results multiline of **Select Customer Order - Services** after approval of Customer Order
- Modified Part # is updated to the Part # Information in 'Part Effectivity' section under 'CO Maint. Obj.' tab of **Manage Invoice Release** screen for an already setup Invoice Releases after Approval of Customer Order
- Modified Part # is updated to the Part # (Main Core) in 'Part Information' multiline of the **Select Customer Order - Services** after approval of the Customer Order
- Modified Part # is updated to the Main Core details of **Record Work Estimates**

Exhibit 1:

Manage Customer Order screen in the Customer Order Services business component under the Service Sales Management business process

The screenshot shows the 'Manage Customer Order' interface. At the top, there are tabs for 'Order Details', 'Work Execution Info', 'TAT & Commercials', 'Shipping Terms', 'Billing & Warranty Terms', and 'Taxes / Charges / Discount'. Below the tabs, there are sections for 'Exchange Info.', 'Customer Info.', and 'Object Details'. A table displays a list of parts with columns: #, Part #, Qty., Mfr. Part, Mfr. #, Part Description, Stock Status, Part Serial #, Part MSN, Mfr. Lot #, Expected Receipt Date, Rmv. from A/c Reg. #, Rmv. from A/c MSN, Mfr. Part # (Rmv.), and Mfr. The first row shows Part # RDD01 and Qty. 1.00000000. A yellow callout box highlights the 'Part #' and 'Qty.' columns with the text: "Part # & 'Qty.' columns can be modified now with certain conditions".

Exhibit 2:

Set Sales Process Parameter screen in the Customer business component under the Sales Setup business process

The screenshot shows the 'Set Sales Process Parameters' interface. It includes a 'Select Parameter Details' section with a dropdown for 'Display Parameters for' set to 'MRO Sales'. Below is a 'Process Parameter List' table with columns: #, Parameter for, Process Parameter, Permitted Values, and Value. The first row is highlighted with a red border and a yellow callout box pointing to it with the text: "Newly added parameter".

#	Parameter for	Process Parameter	Permitted Values	Value
1	Customer Order - Services	Allow Modification of Part # & Qty in Customer Order	Specify "0" for "Allowed" and "1" for "Not allowed"	0
2	Customer Order - Services	Allow manual update of 'Warranty Resolution' in CO & SWO?	Specify "0" for "Yes" and "1" for "No"	1
3	Service Sale Billing	Modification of A/C Reg. # in Invoice Release.	Specify "0" for "Allowed" and "1" for "Not allowed".	0
4	Service Sale Billing	Date identification for Service Invoice generation	Specify "0" for Shipment Date and "1" for System Date	0
5	Customer Order - Services	Exchange Rate Type for Sales	Specify a valid Exchange Rate Type defined in Exchange Rate	SPOT RATE
6	Customer Service Order Billing	Process Usage Based bills within	with permitted values between '0' to '30'	0
7	Customer Order - Services	Auto-approval of Customer Order on Confirmation	Specify "0" for "Required" and "1" for "Not Required"	1
8	Customer Request	Acknowledgment against Customer Requests for "Advance Exchange"	Specify "0" for "Required" and "1" for "Not Required"	0

## WHAT'S NEW IN CUSTOMER REQUEST?

### Ability to default Repair Process Code, Station and Rmv. from A/c Reg. # in Customer Request

Reference: APRP-928

#### Background

In the case of ITM business, when a request is received from the customer for Exchange, an order has to be automatically setup on confirmation of the request if the scopes of the Parts requested are already agreed under the Contract with the customer. For this automation, some mandatory fields (Repair Process Codes, Station, etc.) should be given for a Customer Request to process into Customer Order in Fresh/Approved status.

Thus to process the Customer Order directly in Fresh/Confirmed/Approved status, in this enhancement, these fields are obtained from new parameters. In addition to this, automation of Customer Requests to Customer Orders for lot-controlled parts has also been enabled.

#### Change Details

New Process Parameters have been introduced in **Maintenance Setup > Common Master > Set Process Parameter** screen for the Entity Type 'Service Sale Type', to specify the default value for Repair Process Codes for Customer Order, if the values are not given in the Customer Requests.

#### Exhibit 1:

The **Set Process Parameter** screen under the **Common Master** business component

#	Process Parameter	Permitted Values	Value	Status
1	Execution Type	Enter "0" for 'Non-maintenance Based' and "1" for 'Maintenance Based'	1	Defined
2	Default Pricing Basis	Enter "0" for 'T&M', "1" for 'Fixed Price' and "2" for 'Usage Based'	0	Defined
3	Default Category for Customer Order - Part Jobs	Enter a valid Order Category defined in Common Masters business component.	1-Repair	Defined
4	Default Category for Customer Order - Aircraft Jobs	Enter a valid Order Category defined in Common Masters business component.	1-Repair	Defined
5	Numbering Type for Contract	Enter "0" for 'Manual Numbering type' or a Valid numbering type defined in Document Numbering Class business	0	Defined
6	Numbering Type for Customer Order Services	Enter a valid document numbering Type defined in Document Numbering class business component for Customer Order	CO	Defined
7	Default Repair Order Category for External Repair	Specify a valid Category as defined in 'Create Common Category' activity of 'Logistics Common Master' Business	CS-REPAIR	Defined
8	Contract Category to be considered for default Contract evaluation during CO auto-	Specify a valid Contract Category as defined in 'Maintain Category Codes' activity of Category Component	GTA	Defined
9	Auto Generation of Sale Quote on approval of Pre-quote based Customer Orders	Enter "0" for 'Not Required' and "1" for 'Required'		Defined
10	Level at which Resource pricing should be done	'0' for 'Resource level', '1' for 'Indv. Resource level'		Defined
11	Home Based Stocking	Enter "0" for 'Yes', "1" for 'No'		Defined
12	Acknowledgement Required on confirmation of Customer Order	Enter "0" for 'No', "1" for 'Yes'		Defined
13	Default Reason Code for Exchange ?	Enter a valid Reason Code for Exchange	Adv.Exchange Request	Defined
14	Default Repair Process Code for automation of Customer Requests into Customer	Enter a valid Repair Process Code	INSPECTION	Defined
15				



*Note: This parameter is applicable only if Request Type is 'Advance Exchange'. If the Customer Request is of type 'Repair', then the value given against the parameter will not be defaulted.*

*In addition to this, value against the field 'Req. for A/c Reg. #' in the Part Info tab is defaulted to the column 'Rmv. from A/c Reg.#' on click of Line Ref. # combo to avoid the manual entry.*

Another new Process Parameter has been introduced in **Sales Setup > Customer > Set Sales Process Parameter** screen against the Display Parameter 'MRO Sales', to specify the default Workcenter if the part is set as 'External Repair' in the Contract. Default Work Center specified in the parameter should be an execution Workcenter. Station mapped to this execution Workcenter will be defaulted in the Customer Order which is auto generated from Customer Request.

**Exhibit 2:**

The **Set Sales Process Parameter** screen under the Customer business component

#	Parameter for	Process Parameter	Permitted Values
86	Customer Order - Services	Consider Part Level Default Warehouse as Requesting Warehouse for Exchange Requests in absence of	Enter '0' for
87	PartSale Order - Services	Acknowledgment required on confirmation of Part Sale Order	Enter '0' for
88	Customer Request	Auto Generation of Customer Order on confirmation of Customer Request for 'Repair'	Specify '0' for
89	Customer Request	Auto Generation of Customer Order on confirmation of Customer Request for 'Advance Exchange'	Specify '0' for
90	Customer Order - Services	Status of Customer Order auto-generated through Customer Request for 'Repair'	Specify '0' for 'Fresh', 'Confirmed' and '2
91	Customer Order - Services	Status of Customer Order auto-generated through Customer Request for 'Advance Exchange'	Specify '0' for 'Fresh', 'Confirmed' and
92	Customer Request	Default Workcenter for Customer Order for which Execution facility is set as 'External'	Specify a valid Execution Work Center from 185-20



*Note: Station mapped to the Workcenter mentioned in the parameter will be defaulted only if the Workcenter is not obtained from the Part Master during contract evaluation.*

**Automation of Customer Request to Customer Orders for lot controlled parts:**

A new column 'Mfr. Lot #' is added in Customer Request to facilitate the data entry for Lot controlled parts.

**Exhibit 3:**

The **Manage Customer Request** Screen in the **Manage Sales RFQ** business component

#	Li	Error Message	Core Part #	Mfr. Part #	Mfr. #	Serial #	Mfr. Ser	Lot #	Mfr. Lot	Core Qty	Core UOH	Removed From A/C Reg. #	Removed From A/C MSN
1	1		AIR-INDIA-PA...	3-11860512	00000			LOT-008191-2017	PO-0003...	1,00	EA	6YJMB	
2	2		AIR-INDIA-PA...		00000			LOT-008190-2017	CBPO-00...	1,00	EA	6YJMB	
3													

**Automation Logic:**

a) **Single Part - Single Lot**, will be processed as *One Customer Order*

b) **Single Part - Multiple Lot**

If 'Request For' is selected as 'Repair/Exchange', check the flag 'Consolidate Exec. Order?' in Part Admin - Maintain Maintenance Information for that part mentioned in the request.

- i. *If the value is set as 'Yes', then the system generates a single Customer Order with all lots in it.*
- ii. *If the is set as 'No', then the system generates multiple Customer Orders (Each Customer Order for each Part-Lot combination).*

c) **Multiple Parts – One Customer Order is generated for each part.**



*Note: The above logic is applicable even when the Lot No. is not given in the request document.*

## WHAT'S NEW IN SALE QUOTE, SERVICE SALE BILLING, CUSTOMER SER. ORDER, SALE CONTRACT AND CUSTOMER?

### Ability to set a different pricing for Parts running under Actual cost based pricing in Sale Quotation

Reference: APRP-501

#### Background

This enhancement brings improvements in **Sale Quotation** as part of contracts with the customers when the pricing basis is time and material for the maintenance jobs performed on the aircrafts / main core parts. A quote has to be served for the material pricing estimation to get the customer approval for initiation of work execution. This requires a provision to specify the different pricing basis for Quote computation and Actuals.

#### Change Details

A new parameter has been added under the **Sales Setup** business process > **Sale Contract** component > **Manage Sale Contract** activity under 'Operational Parameters' tab in **Edit Terms & Execution** link. (Exhibit -1)

Category:           Commercials  
 Element:           Quote - Material Pricing  
 Description:       Basis by which parts should be priced in quotation if the pricing basis is set as Actual Issue Cost  
 Permitted Values: Enter "0" for "Standard Cost", "1" for "Std. Purchase Price", "2" for "Std. Sales Price", "3" for "Not Applicable"

- If the above parameter is set as '0' Standard Cost, when Pricing Basis is 'Actual Issue Cost' then system will refer the price captured for 'Standard Cost' control in the **Part Main Information** screen of Part Master for computation of material estimations in the MRO Sales Quote.
- If the above parameter is set as '1' Std. Purchase Price, when pricing basis is 'Actual Issue cost' then the system will refer the price captured for 'Std. Purchase Price' control in the 'Maintain Purchase Information' section of Part Master for computation of material estimations in the MRO Sales Quote.
- If the above parameter is set as '2' Std. Sales Price, then that system will refer the price captured for "Standard Sale Price" control in the 'Maintain Sales Information' section of Part Master for computation of material estimations in the MRO Sales Quote.
- If above parameter is set as '3' Not Applicable, then an existing functionality works i.e., even though Pricing Basis is set as 'Actual Issue Cost' if OEM price is not available in Part master then during the quote for material estimates will be popup with error message "**Price Not Found**" against those parts and user will have to update manually to proceed with the quote.

Exhibit 1:

Sale Contract – Edit Terms & Execution screen

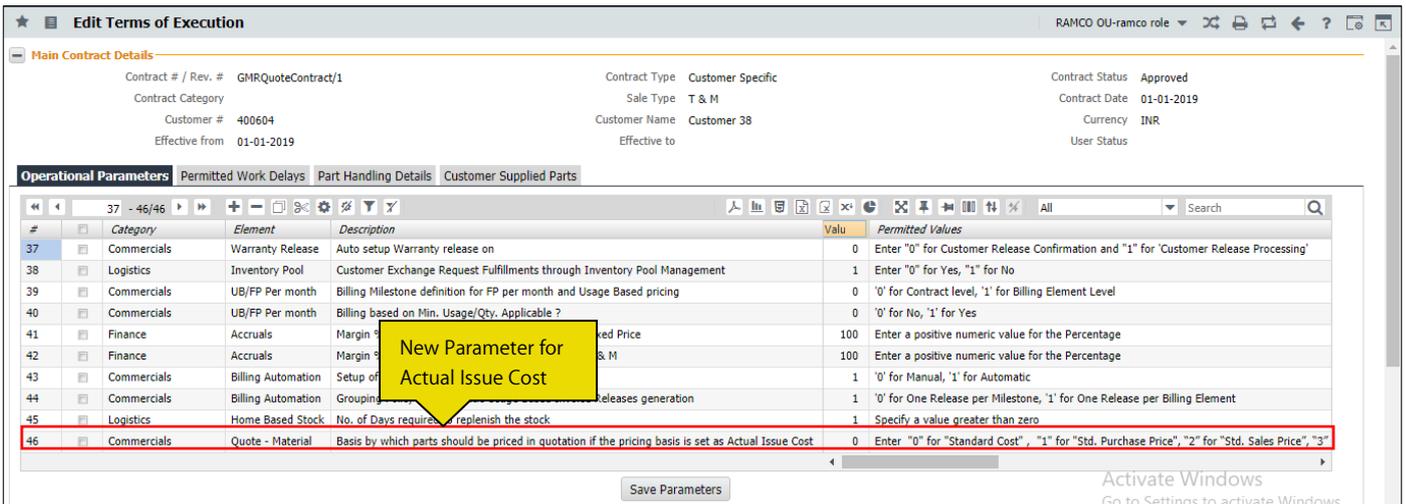
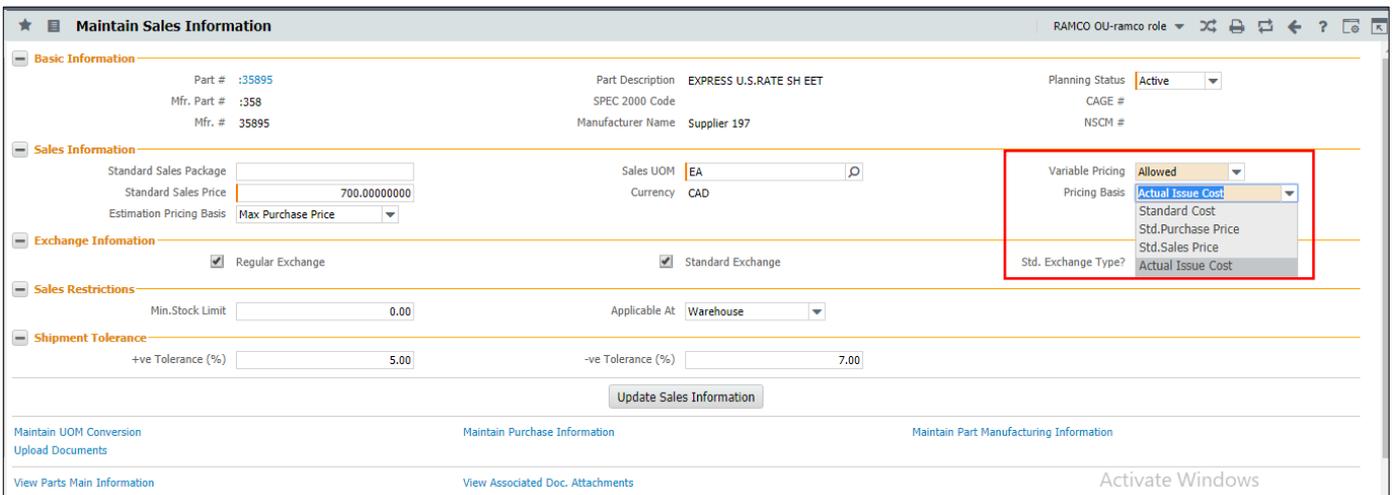


Exhibit 2:

The Part Administration – Maintain Sales Information screen



- If the Pricing Basis is set as 'Actual Issue Cost' and in the Contract if Basis is set as 'Actuals' then the Quotation can be done based on the OEM Pricelist along with mark-up from the Part Price List if applicable, whereas the Final Invoice Release should be based on Actual Issue Cost along with applicable mark-up.

## Ability to provide visibility of Parent Task # in Materials, Resources and External Services tabs

Reference: APRP-900

### Background

For aircraft heavy maintenance, most tasks performed on the aircraft will have parent-task relationship. This enhancement brings improvements in the **Manage Sale Quotation**, **Manage Invoice Release** and **Manage Cust. Order Workscope** screens where a new display-only column 'Parent Task #' is added in the multiline. Thus making parent task visibility against each individual task added in the AME Package / Shop Work Order.

### Change Details

A new display-only column 'Parent Task #' has been added in the following activities:

*Note: The Parent Task # will be stamped in the column for the tasks which have parent-child relationship.*

- Manage Sale Quotation:**  
 'Parent Task #' is added in the multiline of 'Resources', 'Materials' and 'Ext. Services' tab of **Manage Sale Quotation** screen (*Exhibits 1, 2 & 3*)
- Manage Invoice Release:**  
 'Parent Task #' is added in the multiline of the 'Materials', 'Resources' and 'Ext. Services' tabs of the **Manage Invoice Release** screen (*Exhibits 4, 5 & 6*).
- Manage Cust. Order Workscope**  
 'Parent Task #' is added in the multiline of the **Manage Cust. Order Workscope** screen (*Exhibit 7*)

### Exhibit 1:

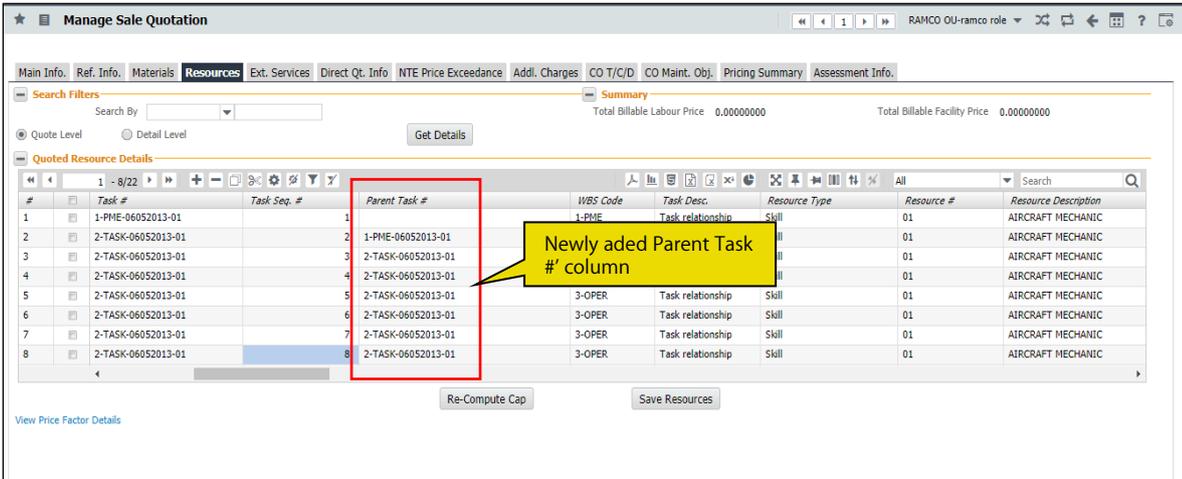
The **Materials** tab in the **Manage Sale Quotation** screen under the **Sale Quotation** business component

The screenshot shows the 'Manage Sale Quotation' interface with the 'Materials' tab selected. A table of 'Quoted Part Details' is displayed. A red box highlights the 'Parent Task #' column, which contains values like '1-PME-06052013-01' and '2-TASK-06052013-01'. A yellow callout box points to this column with the text 'Newly added Parent Task # column'. The table also includes columns for Task #, Task Seq. #, WBS Code, Task Desc., Pricing Element, Part #, and Mfr. Part #.

#	Task #	Task Seq. #	Parent Task #	WBS Code	Task Desc.	Pricing Element	Part #	Mfr. Part #	M
1	1-PME-06052013-01		1	1-PME	Task relationship	Part Price	:35895	:358	35
2	2-TASK-06052013-01		2	3-OPER	Task relationship	Part Price	:35895	:358	35
3	2-TASK-06052013-01		3	3-OPER	Task relationship	Part Price	:35895	:358	35
4	2-TASK-06052013-01		4	3-OPER	Task relationship	Part Price	:35895	:358	35
5	2-TASK-06052013-01		5	3-OPER	Task relationship	Part Price	:35895	:358	35
6	2-TASK-06052013-01		6	3-OPER	Task relationship	Part Price	:35895	:358	35
7	2-TASK-06052013-01		7	3-OPER	Task relationship	Part Price	:35895	:358	35
8	2-TASK-06052013-01		8	3-OPER	Task relationship	Part Price	:35895	:358	35

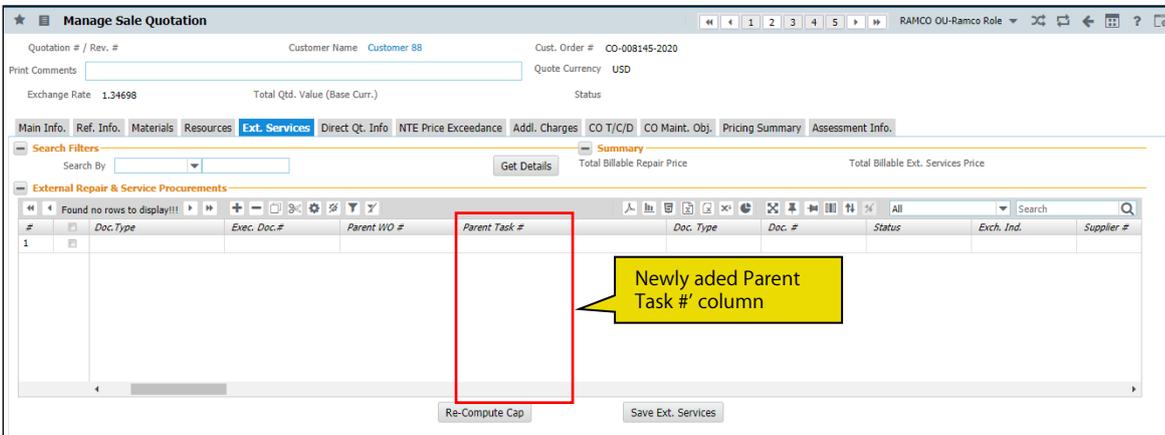
**Exhibit 2:**

The **Resources** tab in the **Manage Sale Quotation** screen under the **Sale Quotation** business component



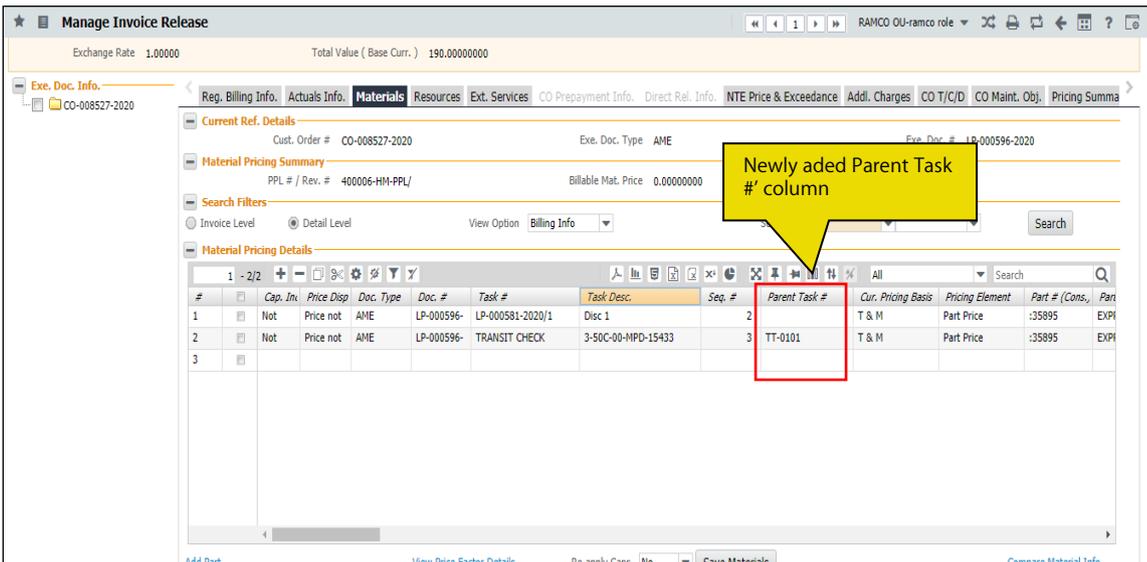
**Exhibit 3:**

The **Ext. Services** tab in the **Manage Sale Quotation** screen under the **Sale Quotation** business component



**Exhibit 4:**

The **Materials** tab in the **Manage Invoice Release** screen under the **Service Sale Billing** business component



**Exhibit 5:**

The **Resources** tab in the **Manage Invoice Release** screen under the **Service Sale Billing** business component

**Manage Invoice Release**  
Exchange Rate: 1.00000 | Total Value (Base Curr.): 602.20

Actuals Info | Materials | **Resources** | Ext. Services | CO Prepayment Info | Direct Rel. Info | NTE Price & Exceedance | Addl. Charges | CO T/C/D | CO Maint. Obj. | Pricing Summary | CO Ref. Doc.

Cust. Order #: CO-008150-2020 | Exe. Doc. Type: AME | Exe. Doc. #: LC-028373-2020

Resource Pricing Summary  
SPL # / Rev. #: test123/6 | Billable Lab. Price: 602.20 | Billable Oth. Res. Price: 0.00

Search Filters  
Invoice Level:  Invoice Level  Detail Level | View Option: Billing Info

Resource Pricing Details

#	Price Disp.	Doc. Type	Doc. #	Parent WO #	Task #	Seq.	Parent Task #	Task	T & M	Pricing Element	Res. Type
1	Priced	AME	LC-	Primary	NST-046213-2020	1		task1	T & M	Resource Pricing	Skill
2	Priced	AME	LC-	Primary	DR-034744-2020	2	NST-046213-2020	landin gear	T & M	Resource Pricing	Skill
3	Priced	AME	LC-	Primary	DR-034744-2020	2	NST-046213-2020	4-NR landin gear	T & M	Resource Pricing	Skill
4	Priced	AME	LC-	Primary	DR-034744-2020	2	NST-046213-2020	4-NR landin gear	T & M	Resource Pricing	Skill
5	Priced	AME	LC-	Primary	DR-034745-2020	3	NST-046213-2020	4-NR parts are	T & M	Resource Pricing	Skill
6	Priced	AME	LC-	Primary	DR-034746-2020	4		4-NR hydraulic	T & M	Resource Pricing	Skill
7	Priced	AME	LC-	Primary	DR-034746-2020	4		4-NR hydraulic	T & M	Resource Pricing	Skill
8	Priced	AME	LC-	Primary	DR-034746-2020	4		4-NR hydraulic	T & M	Resource Pricing	Skill

Re-apply Caps: No | Save Resources | Add Resource | Review Timesheet Details

**Exhibit 6:**

The **Ext. Services** tab in the **Manage Invoice Release** screen under the **Service Sale Billing** business component

**Manage Invoice Release**

Release Main Info.  
Inv. Rel. #/Rev. #: CO-007720-2016 | Release Status: Cancelled | Cust. Order #: CO-007720-2016 | Inv. Rel. Readiness: Not Ready To Bill

Customer #: 400604 | Sale Type / Pricing Basis: T & M/TM | Pend. Rel. Exists?: No

Bill To Customer: 400604 | Bill to: | Ship To Customer: 400604 | Bill to: |

Billing Summary  
Basic Value: 0.00 | Order Level TCDs: 0.00 | Total Value: 0.00 | Currency: CAD  
Exchange Rate: 1.00000 | Total Value (Base Curr.): 0.00

Reg. Billing Info | Actuals Info | Materials | **Resources** | **Ext. Services** | CO Prepayment Info | Direct Rel. Info | NTE Price & Exceedance | Addl. Charges | CO T/C/D | CO Maint. Obj. | Pricing Summary

Current Ref. Details  
Cust. Order #: CO-007720-2016 | Exe. Doc. Type: AME | Exe. Doc. #: VP-000787-2016

Ext. Services Pricing Summary  
SPL # / Rev. #: | Billable Ext. Ser.: 0.00 | Billable Ext. Exp.: 0.00000000

Search Filters  
View Option: Billing Info

Ext. Ser. Pricing Details

#	fica	Repair Process	Pricing Task #	Pricing Task Desc	Parent Task #	Parent	WS Ref.Code	WS Notes	Incl./Excl. R	Incl./Excl. N	Part # (Main Core	Mfr. Part # (Ma
1												

**Exhibit 7:**

The **Manage Cust. Order Workscope** screen under the **Customer Service Order** business component

**Manage Cust. Order Workscope**  
Customer Order #: CO-008150-2020 | Order #: CO-008150-2020 / 0 | Order Status: Processed | Customer #: 400007 / Customer 8 | Contract #: JETask / 0

Order Addl Info  
Workscope Summary | Workscope Details

ALL: 4 | Addl. Workscope: 0 | Out of Scope: 0 | In-scope: 4

Workscope Details

#	Entity #	Description	Exec. Status	Task Pricing Basis	Pricing Task Ref.	Parent Task #	Task - COA?	Task - Curr Pricing Basis
1	NST-046213-2020	task1	Closed	T & M	NST-046213-2020		In Scope	T & M
2	DR-034744-2020	landin gear	Closed	T & M	DR-034744-2020	NST-046213-2020	In Scope	T & M
3	DR-034745-2020	parts are repair	Closed	T & M	DR-034745-2020	NST-046213-2020	In Scope	T & M
4	DR-034746-2020	hydraulic issue	Closed	T & M	DR-034746-2020		In Scope	T & M

Save

## Ability to modify aircraft registration number in Invoice Release and save other editable fields in the ‘Select - Customer Order Service’ screen

Reference: APRP-851

### Background

MRO Service providers usually keep a close track on the tasks that have been performed by their technicians on the customer aircrafts. In case of Line and On-Road maintenance services, the technician is more likely to make mistakes with the data recorded regarding the services provided. Once such possibility could be with the Tail # of the aircraft in which the services were provided.

The error cannot be rectified once the technician has closed the work package, however, such data is required to be corrected before sending out the final invoice to the customer. Hence, the requirement is to enable corrections or modifications to be made to the Aircraft Reg. # in Invoice Release.

### Change Details

The A/C Reg. # column in the entry screen has been made editable along with smart search feature enabled to ensure that correct A/C Reg. # is used for billing the customer. A new parameter has also been added in the **Set Sale Process Parameters** activity under the **Customer** business component to decide if a A/C Reg. # can be modified or not.

### Exhibit 1:

**Select Customer Order – Services** screen in the **Service Sale Billing** business component under the **Service Sales Management** business process

#	A/C Reg. #	Error Log	Inv. Rel. #	Event Compl.?	Exec. Doc. #	Execution Status	Customer #	Cust. Order #	Cust. PO #	Sale Type	Inv. Type	Inv. Category	Inv. Rel. Date	Pay Term
1	6YJMD		1		VP-000658-2014	Closed	400006	CO-007644-2014	1	FP	Regular	P1	03.03.2017	NET45
2	C-FBEF		2	Yes	VP-001334-2017	Not Closed	401088	CO-007868-2017		T & M	Regular	Detail	22.09.2017	NET45
3	101HQ		1	Yes	VP-013462-2018	Closed	400006	CO-008475-2018	4	FP	Regular	Detail	26.12.2018	NET45
4	AT-IVR		2	Yes	VP-013476-2018	Closed	400028	CO-008489-2018	12345	T & M	Regular	Final	29.10.2018	NET45
5	AT-IVR		1	Yes	VP-013480-2018	Closed	400007	CO-008493-2018	123	T & M	Regular	Final	14.11.2018	NET50
6	101HQ		1	Yes	VP-013481-2018	Closed	400006	CO-008494-2018	3	FP	Regular	Trailing	31.10.2019	NET30
7	6YJMA-EX...		1	Yes	VP-013528-2018	Closed	400028	CO-008511-2018	123	T & M	Regular	Detail	21.12.2018	NET30
8	6YJMD		1	Yes	VP-013535-2018	Closed	400006	CO-008518-2018	13637	FP	Regular	P2	01.12.2019	NET50

### Exhibit 2:

**Set Sale Process Parameters** screen in the **Customer** business component under the **Sales Setup** business process

★ **Set Sales Process Parameters** RAMCOOU-Ramco Role

---

**Select Parameter Details**  
 Display Parameters for: HRO Sales

---

**Process Parameter List**

#	Parameter for	Process Parameter	Permitted Values	Value	Value Selected
1	Customer Order – Services	Allow manual update of 'Warranty Resolution'	Specify "0" for "Yes" and "1" for "No"	0	Yes
2	Service Sale Billing	Modification of A/C Reg. # in Invoice Release.	Specify "0" for "Allowed" and "1" for "Not"	0	Allowed
3	Service Sale Billing	Date identification for Service Invoice	Specify "0" for Shipment Date and "1" for	1	
4	Customer Order – Services	Exchange Rate Type for Sales	Specify a valid Exchange Rate Type defined in	SPOT RATE	Spot rate
5	Customer Service Order Billing	Process Usage Based bills within	with permitted values between '0' to '30'	8	
6	Customer Order – Services	Auto-approval of Customer Order on	Specify "0" for "Required" and "1" for "Not"	1	Not Required
7	Customer Request	Acknowledgment against Customer Requests	Specify "0" for "Required" and "1" for "Not"	0	
8	Customer Request	Acknowledgment against Customer Requests	Specify "0" for "Required" and "1" for "Not"	0	

---

**Record Statistics**

Newly added parameter

## Provision to view/amend execution comments in the Process Invoice screen and print the same in the Preview Invoice/Final Invoice Reports

Reference: APRP-534

### Background

For businesses where invoices are reviewed extensively and presented to the customer with lot of details, the Commercials Role may choose to add tasks explicitly for certain actions performed by the technician to make the effort more clear. In such cases, it is opted to add new tasks directly into the Invoice Release and also be able to re-sequence these newly added tasks in-between the already available tasks from execution.

While sequence number for execution of tasks for a customer job might be in a certain order as it is directly being imported from Execution package, but the order in which the tasks are required to be presented to the customer in an Invoice would be different. In such cases, the billing sequence of tasks need not be the same as repair sequence. Hence a provision to differentiate the two has been incorporated.

In addition to task re-sequencing, the steps performed by the technician for any standard task will be recorded as Task Execution Comments. Just like the steps performed during any discrepancy is termed as Corrective Actions which are recorded and presented to the customer, these execution comments are also required to be presented to the customer and hence are required to be visible in the Invoice Release for a review and any corrections.

Thus, provision has been given to review the latest Execution Comment against each task in the **Invoice Release** screen.

### Change Details

A new 'Billing Seq. #' is identified in **Invoice Release** under the **Reg. Billing Info.** tab which can be used to edit the sequence of tasks coming from the execution package. For new task additions, tasks can be added in between existing tasks by choosing 'Add' icon option from the multiline row itself and can be sequenced along with the existing tasks using 'Billing Seq.#'.

A new editable column will be enabled in **Reg. Billing Info** tab to display the latest Task Execution Comment against each task and the user will be allowed to modify it.

#### Exhibit 1:

**Manage Invoice Release** screen in the **Service Sale Billing** business component under the **Service Sales Management** business process

The screenshot shows the 'Manage Invoice Release' interface. At the top, there is a summary bar with fields for Basic Value (800,00), Exchange Rate (1,00000), Order Level TCDs (0,00), Total Value (800,00), and Currency (CAD). Below this, there are tabs for 'Reg. Billing Info.', 'Actuals Info.', 'Materials', and 'Reso'. The main area displays a table with columns: #, I, Price Disp., Doc. Type, Doc. #, Task #, Seq. #, Billing Seq. #, Task Desc., Execution Comment, Add, and Bill. Two rows of data are visible. Three yellow callout boxes provide information: one points to the 'Billing Seq. #' column with the text "'Billing Seq. #' has been enabled."; another points to the '+' icon in the 'Add' column with the text "New tasks can be added through '+' icon."; and a third points to the 'Execution Comment' column with the text "'Execution Comment' column to view/modify the latest execution comment of Tasks.".

#	I	Price Disp.	Doc. Type	Doc. #	Task #	Seq. #	Billing Seq. #	Task Desc.	Execution Comment	Add	Bill
1	E	Priced	AME	LP-000612-2020	CDP-022418-	1	1	Discrepancy	CA-1	+	
2										+	

## Ability to update resource billable quantity at work-detail level

Reference: APRP-535

### Background

During billing process, apart from the billing price, billable quantity is yet another variable which will be extensively reviewed. Resource billable quantity is reviewed extensively in MRO services so as to account for the time and effort put into the job. Since this time booking by an employee need not directly be at a job/task level, the review and modifications to this is also required to be positioned accordingly. When time is booked against a Work Detail of a discrepancy, the edits must also be allowed at the same level

### Change Details

A new **Work Details Summary** multiline has been enabled which shows the resource break up at skill/Attendance Type /Roster level for each Work Detail selected. Provision has been given to modify the quantity at this level. On selection of the task information from the **Resource Pricing Multiline** and by clicking the 'View Timesheet Info' button, fetches the 'Work Detail' section (Work Detail as well as Work Detail Summary). Work Detail section fetches the work done at the highest level (Example: Corrective Action against Discrepancies), whereas the information icon click in Work Detail multiline, updates the breakage of resource consumption done against each individual work detail.

Modifications done to billable resource quantity in **Work Details Summary** multiline or in the 'Timesheet Info.' section will automatically be updated in the **Resource Pricing** multiline.

It is natural that once amendments are done in **Work Details Summary**, the billable quantity will not match the timesheet breakup available in the **Employee Timesheet** multiline.

### Exhibit 1:

**Manage Invoice Release** screen in the **Service Sale Billing** business component under the **Service Sales Management** business process

The screenshot shows the 'Manage Invoice Release' interface. It features two main data tables. The left table, 'Work Details', lists tasks with columns for '#', '75', 'Work Detail', 'Billable Hrs.', 'Billable Emp.', and 'Exec. Dt.'. The right table, 'Work Details Summary', provides a breakdown with columns for '#', 'Resource', 'Billable Hrs.', 'Billable Emp. count', 'Actual Hrs.', and 'Actual En'. A yellow callout box points to the 'Work Details Summary' table with the text: 'New Multiline 'Work Detail Summary' has been added to display/modify various resource billable quantity'. At the bottom, there are several action buttons: 'Update Rel. Readiness', 'Evaluate Invoice', 'Confirm', 'Process', 'Return', 'Cancel', and 'Quick Links'.

## Ability to resolve warranty in Invoice Release for quote based bills and setup Warranty Release on confirmation of Customer Release

Reference: APRP-228

### Background

This enhancement is to give provision to generate Warranty Release prior to the final invoice in order to claim warranty in the Invoice Release screen by the warranty user. Thus the warranty user need not wait until the final invoice is generated for quote based bills and therefore setup Warranty Release on confirmation of the Customer Release.

### Change Details

- A new parameter has been added to enable setting up of Warranty release on Confirmation of Customer Release.in the 'Operational Parameters' tab in the **Edit Terms of Execution** link page in the **Manage Sale Contract** activity under the **Sale Contract** business component as given below:

**Category:** Commercials  
**Elements:** Warranty Release  
**Description :** Auto setup Warranty release on  
**Permitted Value:** Enter "0" for Customer Release Confirmation  
"1" for 'Customer Release Processing'
- A new parameter has been added to enable modification/resolution of warranty in Invoice Release for Quote based billing in the **Set Sales Process Parameters** activity of the **Customer** business component

**Category:** MRO Sales  
**Parameter For:** Customer Service Order Billing  
**Description:** Modification of Warranty Status in Quote based Invoice Release  
**Permitted Value:** Enter '0' for 'Allowed' and '1' for 'Not Allowed'
- Another new parameter has been added for approval of warranty claim quote in the **Manage Additional Options** activity under the **Customer** business component as given below:

**Category:** Commercials  
**Elements:** Warranty Claim  
**Description:** Approval of warranty claim Quote  
**Permitted Value:** Enter "0" for Required and "1" for 'Not Required.
- In the **Manage Invoice Release** activity under the **Service Sale Billing** business component, provision has been given as follows:

Actual Basis

"Warranty Release" is auto setup in 'Fresh' status based on the warranty resolved in the Customer Release.  
Release and the Bill to Customer given if the following conditions are true:

- i. The Billing Basis is 'Actuals'
- ii. The process parameter 'Auto setup warranty release on' is set as '0' for 'Customer Release Confirmation' in the 'Operational Parameters' tab of the **Edit Terms of Execution** link page in the **Sale Contract** business component.

*Note: 1) If no Warranty Release is already available, a new Warranty Release is setup based on confirmation of customer release.*

*Note: 2) If Warranty release is already available, the system updates the existing Warranty Release on click of the 'Get' pushbutton.*

Quote Basis

- Warranty Release is auto setup in 'Fresh' status based on the warranty resolved in customer release and as per warranty Quote if the following conditions are true:
  - i. The Billing Basis is 'Quote'
  - ii. The process parameter 'Auto setup warranty release on' is set as '0' for 'Customer Release Confirmation' in the 'Operational Parameters' tab of the **Edit Terms of Execution** link page in the **Sale Contract** business component

*Note: 1) After claiming warranty in Customer Release and on confirmation, Warranty Quote will be generated.*

*2) If no Warranty Quote is already available, a new Warranty Quote is setup based on confirmation of the Customer Release.*

*3) If Warranty Quote is already available, the system updates the existing Warranty Quote on click of 'Get' button.*

*4) On approval of Warranty Quote Warranty Release will be generated. If no Warranty Release is already available, a new Warranty Release is setup based on approval of the Warranty Quote.*

*If Warranty release is already available, the system updates the existing Warranty Release on click of 'Get' button.*

**Exhibit 1:**

**Operational Parameters** tab in the **Edit Terms of Execution** link in the **Manage Sale Contract** activity under the **Sale Contract** business process.

The screenshot shows the 'Edit Terms of Execution' interface. At the top, there are contract details: Contract # / Rev. # 400232-CM-2010-CL65-CR3-200/3, Contract Type Customer Specific, Contract Status Approved, Contract Category SLA, Sale Type FP, Contract Date Sep/20/2010, Customer # 400232, Customer Name Customer 18, Currency USD, Effective from Dec/01/2011, and User Status.

The 'Operational Parameters' tab is active, showing a table with the following columns: #, Category, Element, Description, Value, Permitted Values, Auto Hold?, Hold Code, and Hold Comments - Commercial.

#	Category	Element	Description	Value	Permitted Values	Auto Hold?	Hold Code	Hold Comments - Commercial
31	Commercials	Limit Based Hold	Applicability of Hold on Cost Exceedance		Enter "0" for "Required", "1" for			
32	Commercials	Hold Event	Event of Hold Initiation		Enter "0" for "Estimates", "1" for			
33	Commercials	Hold Escalation Level	Entity on which hold needs to be applied		Enter "0" for "Task", "1" for "Part"			
34	Commercials	Cost based Hold -	Threshold limit beyond which hold needs to be		Specify the Cost limit in Contract			
35	Commercials	Warranty Release	Auto setup Warranty release on		Enter "0" for Customer Release			

A red box highlights the row for 'Warranty Release' (row 35). A yellow callout bubble points to this row with the text 'Newly added process parameter'. Below the table is a 'Save Parameters' button.

Exhibit 2:

Set Sales Process Parameters in the Customer business process

The screenshot shows the 'Set Sales Process Parameters' window. At the top, there is a 'Select Parameter Details' section with a dropdown menu set to 'All'. Below this is the 'Process Parameter List' section, which contains a table with the following data:

#	Parameter for	Process Parameter	Permitted Values	Value	Value Selected
97	Customer Order – Services	Auto inherit Journal Vouchers on Customer Orders as Additional Charge	Specify '0' for "Required" and '1' for "Not	0	
98	Customer Order – Services	Default Charge Code for auto inheritance of Journal Voucher as Charges	Specify a valid charge code defined in Tax	09	
99	Customer Order – Services	Default Variant Code for auto inheritance of Journal Voucher as Charges	Specify a valid variant code defined in Tax	09	
100	Customer Order – Services	Default price factor for billing JV on Customer Orders	Specify a value from 0 to 1	0.9	
101	Customer Service Order Billing	Modification of Warranty Status in Quote based Invoice Release	Enter '0' for 'Allowed' and '1' for 'Not Allowed'	0	
102					

A yellow callout box with a pointer highlights row 101, containing the text: "Newly added process parameter". At the bottom of the window, there is a 'Set Process Parameters' button and a 'Record Statistics' section.

Exhibit 3:

Manage Additional Options link in the Customer business component

The screenshot shows the 'Manage Additional Options' window for Customer # GDC-LINE-1. The 'Definition For' section is set to 'Category'. Below this is the 'Parameter Details' section, which contains a table with the following data:

#	Category	Parameter	Permitted Values	Value	Error Message
1	Commercials	Approval of warranty claim Quote	Enter '0' for 'Required' and '1' for 'Not Required'		
2	Customer Part Usage	Usage of other Customer stocks	Enter '0' for 'Allowed', '1' for 'Not Allowed'		
3	Customer Part Usage	Default Stock Status for Buyer Furnished Equipment	Enter a valid stock status of Ownership		
4	Customer Part Usage	Default Stock Status for Customer Stock Replenishment	Enter a valid stock status of Ownership		
5	Customer Stock Valuation	Valuation of Revenue Parts	Specify '0' for 'Not Required' and '1' for 'Required'		
6	Loan for Customer	Loan Parts on behalf of Customer?	Enter '0' for 'Not Allowed', '1' for 'Allowed'		
7	Loan for Customer	Default numbering type for Loan Order	Specify a valid numbering type applicable for Loan Order transaction		
8	Loan for Customer	Default numbering type for Loan/Rental Receipt Transaction Document	Specify a valid numbering type applicable for Loan/Rental Receipt transaction.		
9	Loan for Customer	Default numbering type for Loan Order Issue	Specify a valid numbering type applicable for Loan Order Issue transaction.		
10	Procurement for Customer	Parts purchase on behalf of Customer	Specify '0' for 'Not Required' and '1' for 'Required'		
11	Procurement for Customer	Default numbering type for Purchase Request	Specify a valid numbering type applicable for Purchase Request transaction		
12	Procurement for Customer	Default numbering type for Auto Purchase Request	Specify a valid numbering type applicable for Purchase Request transaction		

A yellow callout box with a pointer highlights row 1, containing the text: "Newly added process parameter". At the bottom of the window, there is a 'Save' button.

## Ability to review Work Details Summary details for more than one task at a time

Reference: APRP-1231

### Background

This enhancement brings the improvement in **Process Invoice** in the form of enabling Billing Hours Summary display across multiple task numbers selected, Work Details, Work Details Summary and Timesheet Info. can be retrieved at once. Also, the space for Work Detail section has been increased enabling users to view more information.

### Change Details

New Controls and Combo loading logic:

- New Controls 'Exec. Doc#', 'Task #', 'Task Description', and 'Task Seq.#' has been added under 'Work Details Summary' multiline of Resource tab. ( **Exhibit-1** )

If multiple rows are selected from the Resource Pricing Details multiline, all the Tasks get loaded in the 'Summary of Task' Combo UI of 'Work Details Summary' section. 'Summary of Task' combo UI will be defaulted with 'Blank' and details of all Tasks loaded will be retrieved in the multiline.



*Note: Timesheet details of selected tasks will also be automatically retrieved in the EMP. Timesheet multiline.*

- A new option 'Splitter' will be displayed in the left side of the Tree Section to increase the space of the multiline. Once 'Splitter' is collapsed, horizontal space increases for better visibility.(**Exhibit-2** ).
- On click of the Expand option in 'Work Details' / 'Work Details Summary' multiline, specific grid alone will gets displayed in multiline in the expanded window. Provision has been provided to review and modify the details in the expanded window. The modified details will be updated in the original grid on closing the expanded window. (**Exhibit-3** ).



*Note : On 'Save' the modified details get updated in the original multiline of the 'Work Details'/'Work Details Summary' section.( **Exhibit-4** ).*

#### Exhibit 1:

Service Sale Billing - Process Invoice screen

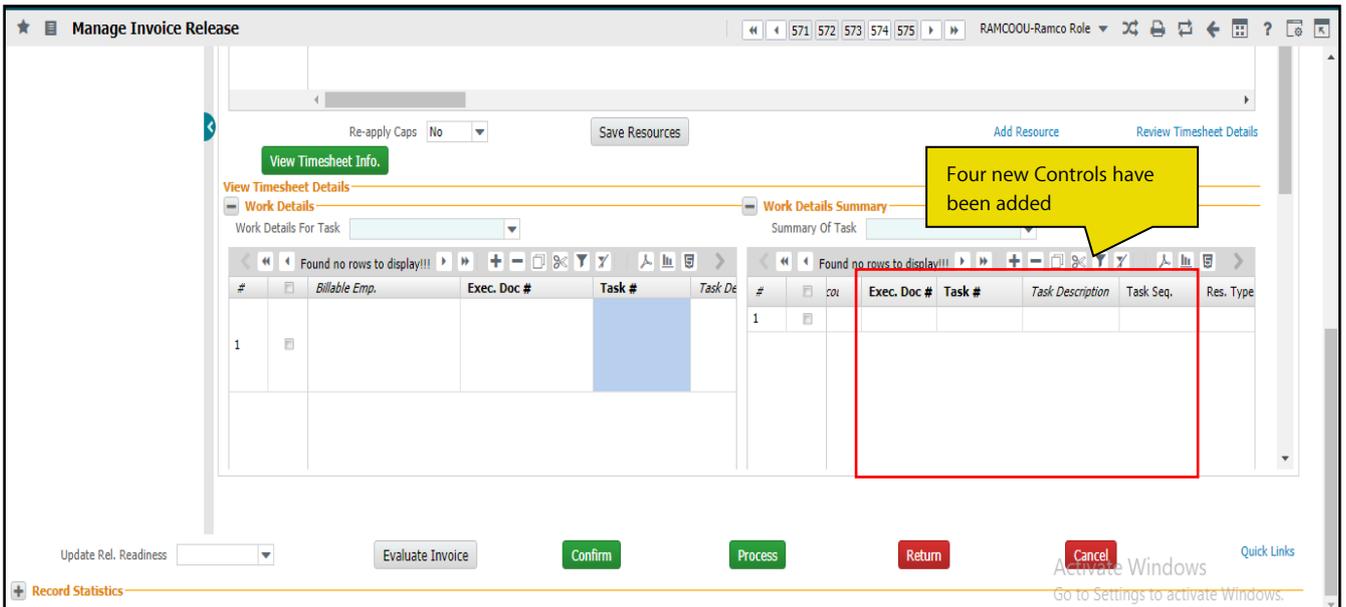


Exhibit 2:  
Service Sale Billing - Process Invoice screen

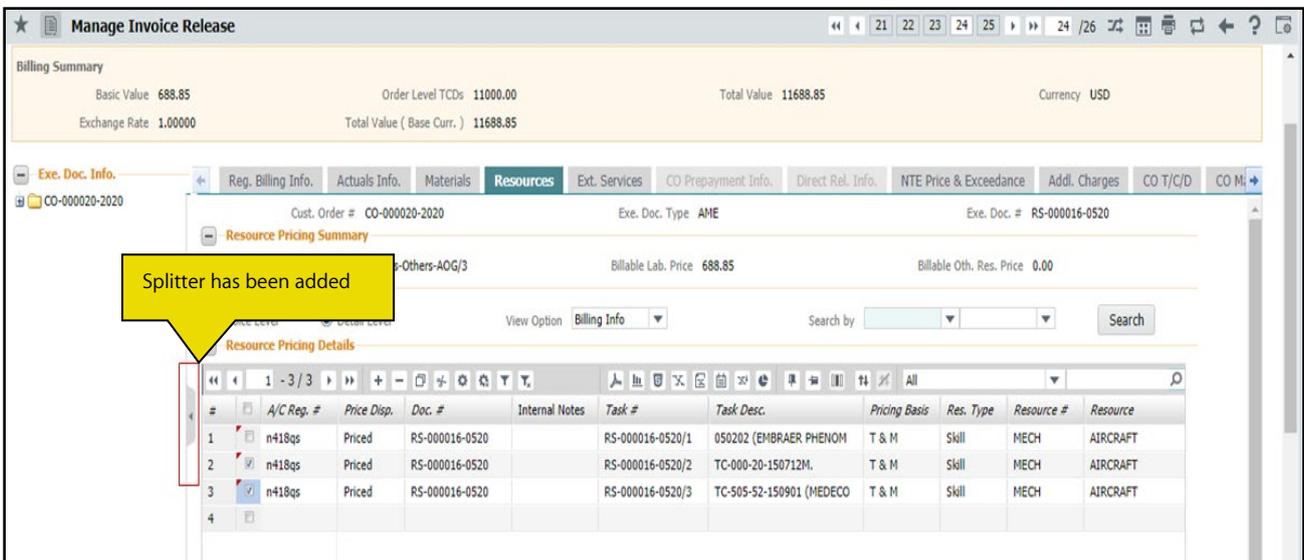


Exhibit 3:  
Service Sale Billing - Process Invoice screen

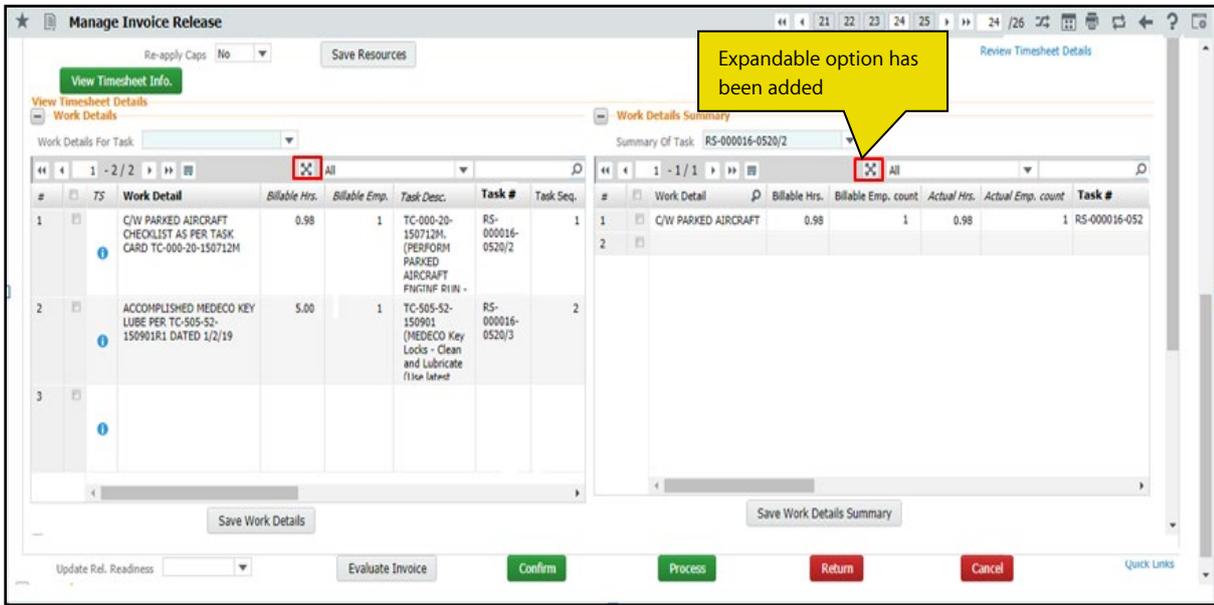
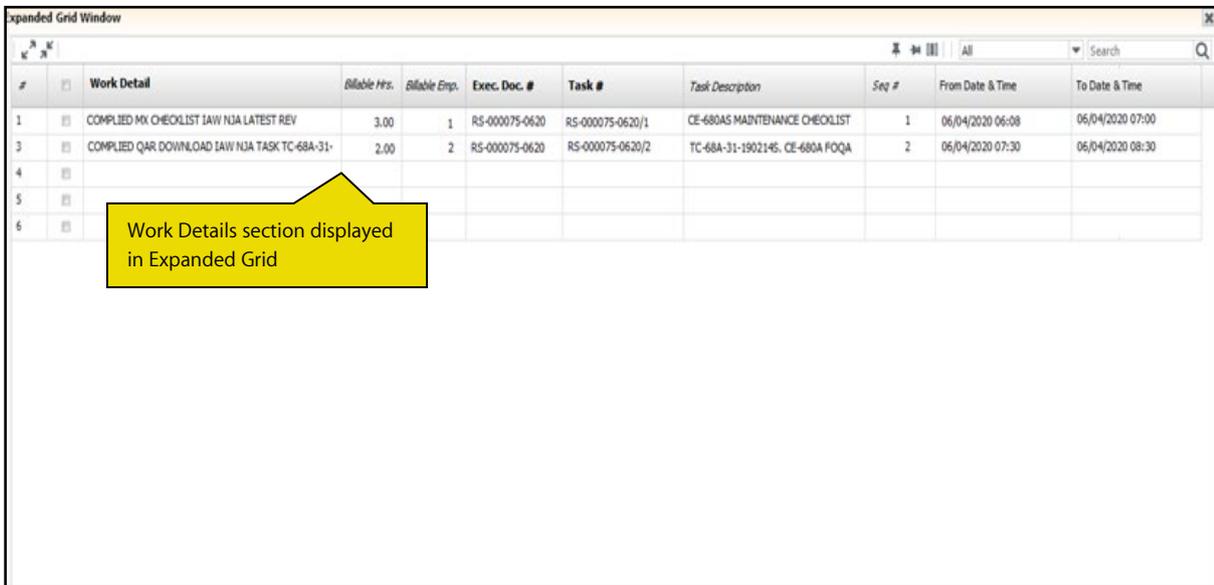


Exhibit 4:  
Service Sale Billing – Process Invoice screen



## WHAT'S NEW IN CUSTOMER ORDER MANAGEMENT HUB?

### Ability to set the user preferences for the data access in CO hub

Reference: APRP-957

#### Background

This enhancement brings improvements in **Customer Order Management Hub** by adding a provision to set user preferences for the user. The screen will have provision to define preferences based on a set of configurable parameters to manage data retrieval in **Customer Order Management Hub** and **Customer Order Hub**.

#### Change Details

New controls 'Business Type' and 'Document Type' has been added above the J query section.

- Business Type Combo UI is loaded with 'Repair', 'Advance Exchange', 'Sales', 'Rental'. **(Exhibit-1)**
- Document Type combo UI is loaded with 'ALL', 'Customer Request', 'Customer Order', 'Pre-Quotation', 'Sale Quotation'. **(Exhibit-2)**

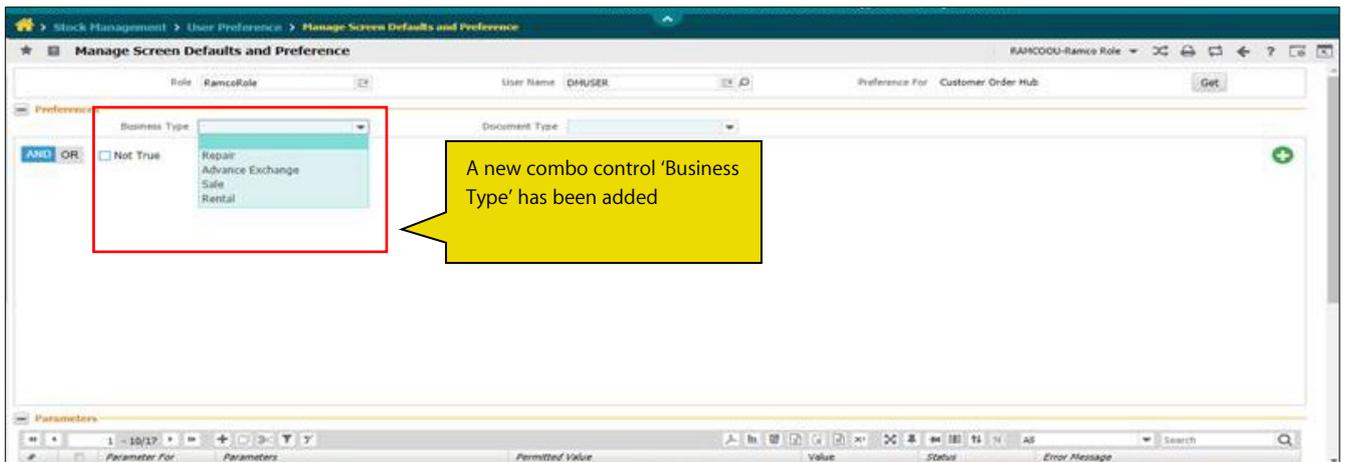
The below combinations will be used for particular **Business Type**:

1. If Business Type is 'Repair/Advance Exchange'
    - ALL
    - Customer Request
    - Pre-Quotation
    - Customer Order
    - Sale Quotation
  2. If Business Type is 'Rental'
    - Customer Request
  3. If Business Type is 'Sale'
    - All
    - Customer Request
    - Pre-Quotation
    - Sale Order
1. The below mentioned values will be loaded in first column of J Query if 'Business Type' combo is selected as **'Repair'** and Document Type as **'Customer Order / Sale Quotation / Pre-Quotation'** - Customer Group, Customer #, Customer Name, Station , Work Centre, Part#, Part Description, Part Type, Mfr. #, Mfr. Part #, Part Category, Part Group, A/c Reg. #, A/c Model, A/c Group, Service Sale Type, Order Applicability, Priority.
  2. The below mentioned values will be loaded in first column of J Query if 'Business Type' combo is selected as **'Repair'** and Document Type as **'All / Customer Request'** - Customer #, Customer Name, Part #, Part Description, Part Type, Mfr. #, Mfr. Part #, Part Category, Part Group, A/c Reg. #, A/c Model, A/c Group, Priority.

3. The below mentioned values will be loaded in first column of J Query if 'Business Type' combo is selected as '**Advance Exchange**' and Document Type as '**Customer Order / Sale Quotation / Pre-Quotation**' - Customer Group, Customer #, Customer Name, Station , Work Centre, Part#, Part Description, Part Type, Mfr. #, Mfr. Part #, Part Category, Part Group, Service Sale Type, Order Applicability, Priority.
4. The below mentioned values will be loaded in first column of J Query if 'Business Type' combo is selected as '**Advance Exchange**' and Document type as '**All / Customer Request**' - Customer Group, Customer #, Customer Name, Part#, Part Description, Part Type, Mfr. #, Mfr. Part #, Part Category, Part Group, Priority.
5. The below mentioned values will be loaded in first column of J Query if 'Business Type' combo is selected as '**Sale**' and Document type as '**All / Customer Request / Pre-Quotation**' - Customer Group, Customer #, Customer Name, Part #, Part Description, Part Type, Mfr. #, Mfr. Part #, Part Category, Part Group, Priority.
6. The below mentioned values will be loaded in first column of J Query if 'Business Type' combo is selected as '**Rental**' and 'Document Type' as '**Customer Request**' - Customer Group, Customer #, Customer Name, Part #, Part Description, Part Type, Mfr. #, Mfr. Part #, Part Category, Part Group, Priority.

**Exhibit 1:**

**Customer Order Management Hub – User Preference screen**

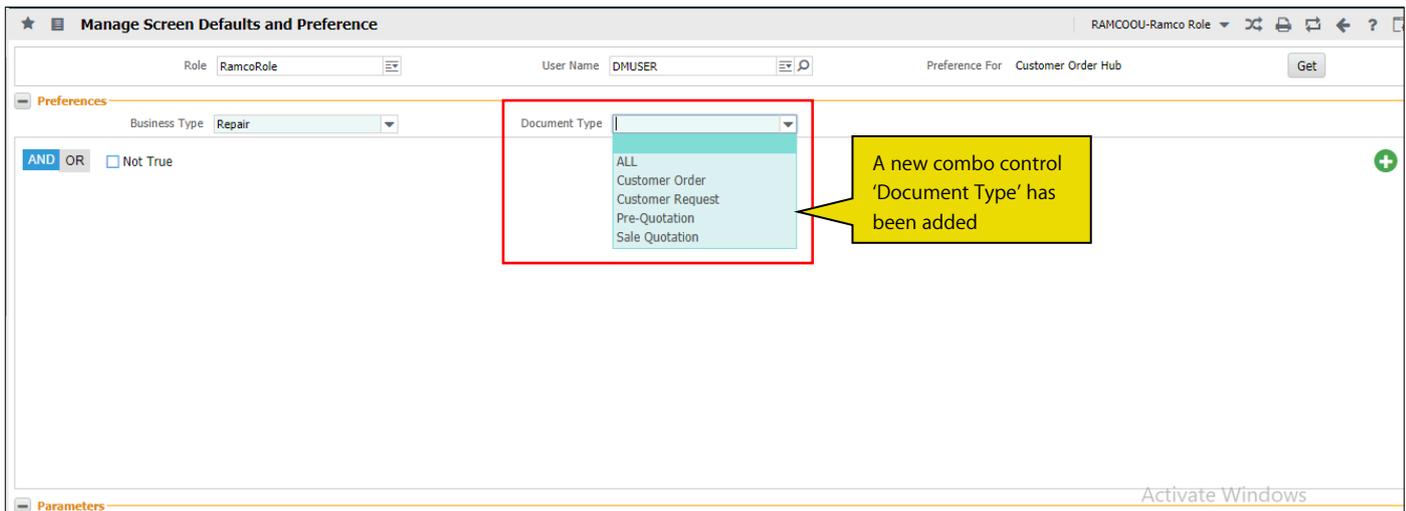


- If 'Business type' or 'Document Type' combo is blank, the system throws validation on click of 'Save' button – “Please select values in Business Type and Document Type.”

*Note that the Group Option in J Query Section is disabled and will not be visible in the rule builder.*

**Exhibit 2:**

**Customer Order Management Hub – User Preference screen**



- The values in Document Type will be loaded only when access right to the respective screen is mapped for a login user in Deployment Admin.
- The values are saved against Document Type as 'All' only if rules are not set against other document types – "Rules are already defined for particular document type."

## Additional improvements in CO Hub to enable advanced search, source part details and visibility on document status

Reference: APRP-929

### Background

This enhancement brings improvements in **Customer Order Management Hub** in the form of new tile addition 'Requests Under Processing' and logic change in tile 'Execution-in-Progress'. Enhancement also includes a major change to show the automation rule failure against the Processing Remarks column, if Customer Requests fail to auto generate into a Customer Order due to automation rules. In addition to this several columns (Customer Req'd. Date, Ack. Remarks, View Attachments, etc.) are added in the Summary Multiline to avoid traversal to Detail Section.

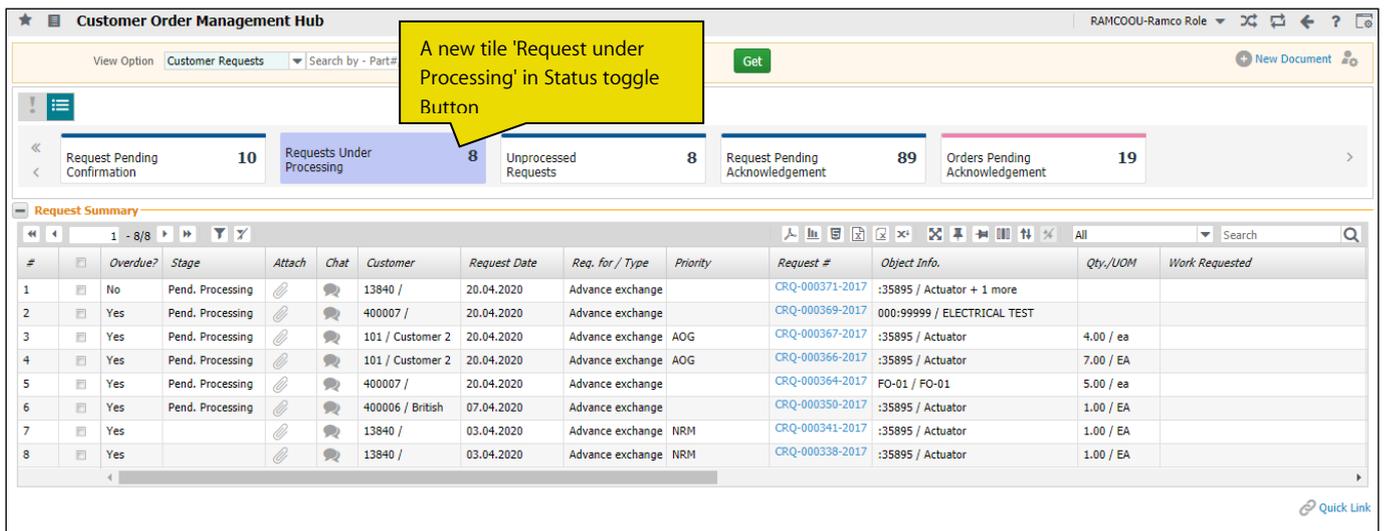
### Change Details

#### New Tile and Tile Logic Change:

A new tile 'Request Under Processing' is added in status toggle button to categorize the requests for which the automation is set as required, which is picked by scheduler but not auto-generated into a Customer Order.

#### Exhibit 1:

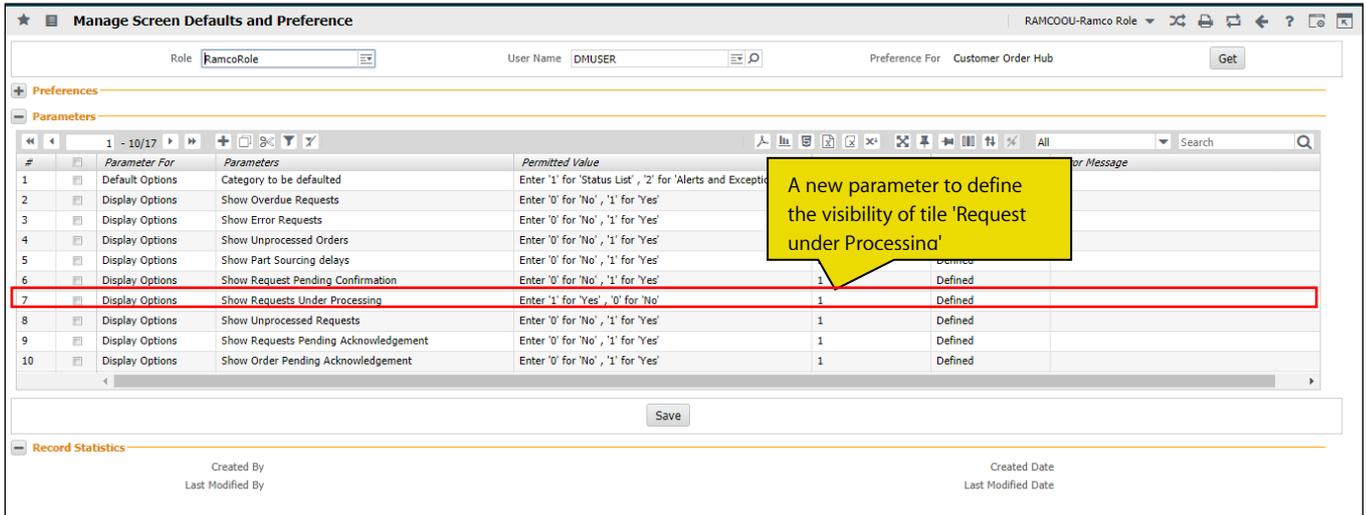
The **Customer Order Management Hub** under the **Commercials Management** business component



The existing tile 'Execution In Progress' has been renamed 'Orders in Execution' and all Customer Orders, for which Execution Document status is Draft, Fresh, Planned, In-Progress and Completed is fetched against this tile.

#### Exhibit 2:

The **Manage Screen Defaults and Preference** under the **User Preference** business component

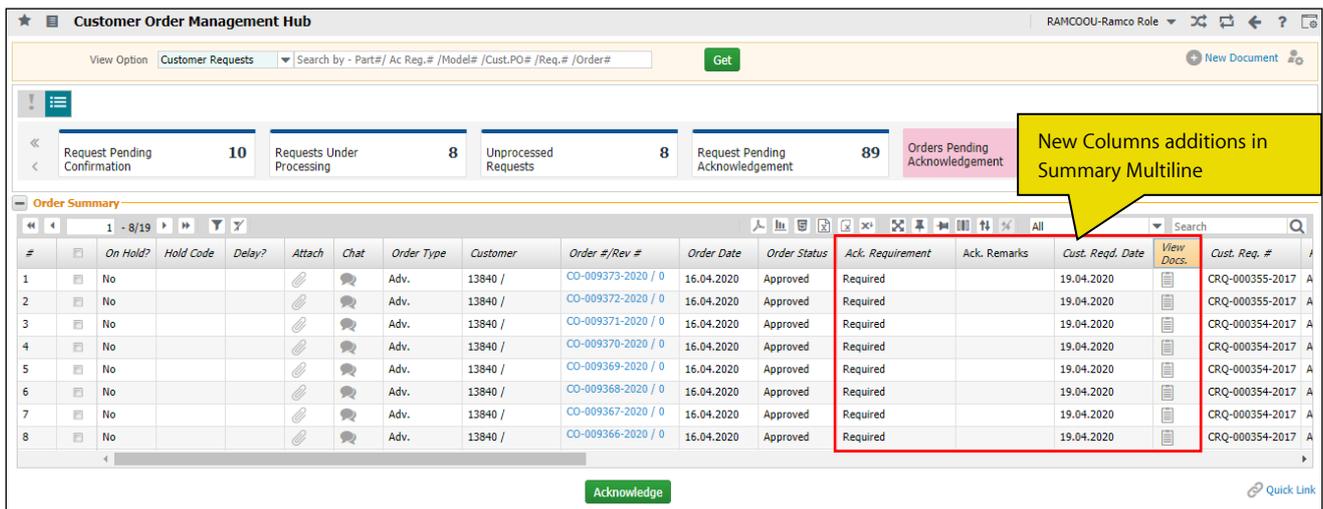


**New Column Additions in Summary Multiline:**

In the 'Request Summary' multiline, new columns such as 'Processing Remarks' and 'View Attachments' have been added. In the 'Order Summary' multiline, new columns such as 'Cust. Req. Date', 'Ack. Requirement', 'Ack. Remarks', 'View Attachments' are added to avoid the traversal to Detail section in **Customer Order Management Hub**.

**Exhibit 3:**

The **Customer Order Management Hub** under the **Commercials Management** business component



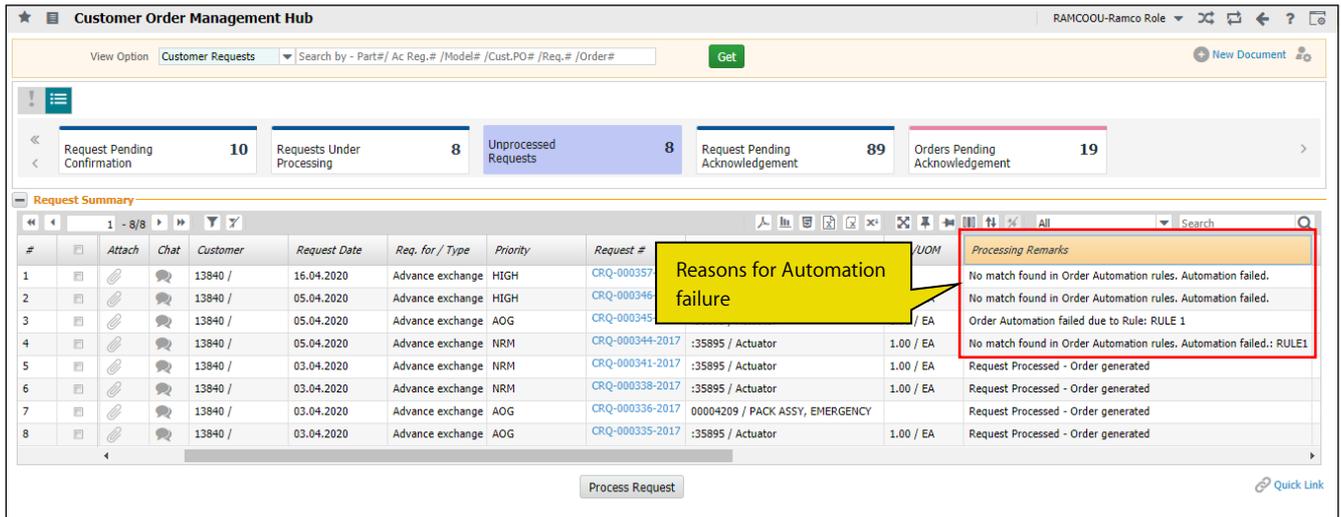
**Automation Rule Failure - Stamping:**

Request Documents which are not processed into an Customer Order due to Automation Rule Failure, Processing Remarks column of Part multiline in Request Summary Multiline as well as in Detail section, will have the following remarks. If the rule is failed for:

- i) **Exclusion scenario** : Order Automation failed due to Rule <%%Rule Description%%>
- ii) **Inclusion scenario** : No match found in Order Automation rules. Automation failed.

**Exhibit 4:**

The **Customer Order Management Hub** under the **Commercials Management** business component

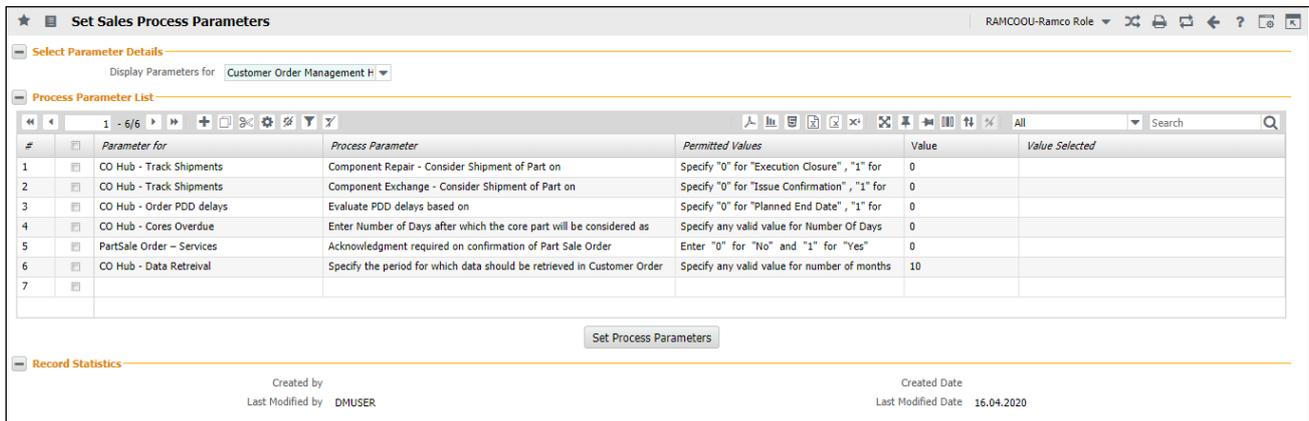


**New Parameter for Data Retrieval in Customer Order Management Hub:**

A new parameter 'Specify the period for which data should be retrieved in **Customer Order Management Hub** is added in **Sales Setup > Customer > Set Sales Process Parameter**. Value specified against this parameter will be used for initial data retrieval on Customer Order Management hub page launch.

**Exhibit 5:**

The **Set Sales Process Parameter** under the **Customer** business component



**Ability to view multiple revisions of Customer Order with in CO Hub:**

A new combo UI has been added next to the control 'Details Of' in Order Detail section, where all the revisions of Customer Orders will be fetched on selection of combo UI.

**Exhibit 6:**

The **Customer Order Management Hub** under the **Commercials Management** business component

Customer Order Management Hub

Details of **CO-009352-2020 / 3**

Customer: 13840 / 13840CUST

Priority: AOG | Order Date: 09.04.2020 | Doc. Status: Processed

**Exchange**  
 Type: Adv. Exchange with Repair | Source Unit: Pending Sourcing | Core Unit: Not Initiated

**Work Execution**  
 Facility: Internal | Status: Under Planning | Estimates: Not Applicable

Request Details | **Order Details** | Order Terms | Order Ref. Info.

**Order Additional Details**  
 Order Date: 09.04.2020 | Order Stage: Firm | Cust. PO #: CRQ-000352-2017 | Source Doc. Type/Source Doc. #: Customer Request / CRQ-000352-2017  
 Order Currency: CAD | Station: YUL | Exec. Facility: Internal | Primary Work Center/Repair Agency: YUL-100-00

**Order Exchange Info.**  
 Exchange Type: Exchange with Repair | Exch. Part Identification: Any Part | Basis of Pegging: | Reason for Exch. / Initiated As: Adv.Exchange Request / Advance Exchange

**Object Info.** | Work Requested Info.

**Contract Info.**  
 Sale Contract: PartInternal01 | Obj. Effectivity Code: PE01 | Sale Type: T & M | Pricing Basis: TM

**Part Info.**

#	Part #	Part Descrip	Mfr. #	Mfr. Par	Stock status	Part Serial	Part MSN	Mfr.Lot	Qty.	UOM	Home based stk. Cons.?	Source Part Info.	Expect
1	:35895	Actuator	35895	:35895					1,00	EA		:35895	
2													

A new combo UI to retrieve revisions of Customer Order

## WHAT'S NEW IN CUSTOMER INVOICE?

### Ability to post the Analysis code based on the Contract Analysis code for the Fixed Monthly revenue & Usage Based Revenue.

Reference: APRP-111.

#### Background

Many organizations analyze their profits/revenues based on multiple dimensions. 'Analysis Code/Sub Analysis Code' is one such identifier to analyze Revenue.

In case of HAECO, each customer contract is being identified with an 'Analysis Code', so that the revenue booking/analysis can be done at each contract level and the revenues can be posted to the respective analysis codes.

#### Change Details

In **Sale Contract**, if the Analysis Code is provided, then during invoicing for fixed monthly charges and usage based charges the Analysis Code provided in the contract will be considered for revenue posting.

If the Analysis Code is not provided, then the default Analysis Code mapped to the account code for the applicable service sale ARD will be considered.

#### Exhibit 1:

**Manage Sale Contract** screen in the **Sale Contract** business component

#### Exhibit 2:

**Accounting Information** screen in the **Customer Invoice** business component

Accounting Information

Transaction # CT-000391-2020  
Transaction Type Customer Service Invoice  
Transaction Date 01.05.2020  
Financial Posting Date

Accounting Information

#	Account #	Dr/Cr	Currency	Transaction Amount	Finance Book	Cost Center	Analysis #	Sub Analysis #	Base currency
1	120100	Debit	CAD	100.00	AVEOS				
2	246800	Credit	CAD	100.00	AVEOS		A10	101	

'Analysis Code' Defaulted from 'Sale Contract'

## WHAT'S NEW IN MANAGE CONSIGNMENT CONSUMPTION REPORTING?

### Automatic Consignment Invoice Generation on Confirmation of Consignment Report

Reference: APRP-865

#### Background

For a Consignment Part Sales, after Issue Confirmation of Parts on consignment to a customer, an Invoice has to be generated manually. The requirement here is to automate such generation of Consignment Sales Invoice on confirmation of Consignment Report.

#### Change Details

On confirmation of Consignment Report from the **Manage Consignment Consumption Reporting** screen, Consignment Sales Invoice will be auto generated based on the below set option at Customer level:

Screen: **Manage Additional Options**

Category: Consignment Part Sales

Parameter: Automatic Consignment Invoice Generation

Permitted Values: Enter '0' for 'Not Required', '1' for 'Required - Fresh Status', '2' for 'Required - Authorized Status'

If the above Set option is set as:

- 0 - Invoice will not be generated on confirmation of Consignment Report. It has to be created manually.
- 1 – Invoice will be generated in 'Fresh' status.
- 2 – Invoice will be generated in 'Authorized' status.

Also, when there are more than one PSO's in the Consignment Report, grouping of Invoice will be considered based on the below set option at Customer level:

Screen: **Manage Additional Options**

Category: Consignment Part Sales

Parameter: Grouping option for auto generated Invoices

Permitted Values: Enter '1' for 'Consumption Report level', '2' for 'Customer PO Level'

Further, if Sale Type or Currency or Ship to Customer or Pay term is different, multiple invoices will be generated.

#### Exhibit 1

**Manage Pack Slip / Bill Back Invoice** activity in the **Customer Direct Invoice** business component under the **Receivables Management** business process

Displays Consignment Sales Invoice created in 'Fresh' status

★ Manage Pack slip/Bill back Invoice
RAMCO OU-ramco role

**Invoice Details**

Invoice # PSINV0000232017

Invoice Type Consignment Sales Invoice

Status Fresh

Invoice Date 03-18-2020

Numbering Type

Currency CAD

Finance Book

Comments Comments

Sale Type 678

**Customer Details**

Customer # 13637

Customer Name INDIANAIRWAYS

Bill to Cust. # 13637

Bill to ID 001

Bill to Cust. Name INDIANAIRWAYS

Ship to Cust. #

Ship to ID

Ship to Cust. Name INDIANAIRWAYS

**Payment Details**

Pay Term N030D000\_00.0

Anchor Date 03-18-2020

Receipt Type CREDIT

Receipt Method Regular

Cash #

Remit to Company

Remit to Bank

Auto Adjust No

Price list # PPL1

**Invoice Value Summary**

Basic Value	TCD Value
30.00000000	0.00000000
Freight Amount	Total Inv. Amount
0.00	30.00
Exchange Rate	Total Inv. Amount (Base curr.)
1.00000000	30.00000000

**Part Info**

#	Line #	Ref. Document	Ref. Doc #	Ref. Doc. Date	Ref. Doc. Line #	Billing Element	Part #	Part Description	Stock Status	UOM	Order Qty
1	1	Part Sale Order	P0002045		1		00000584:D2269_LT	00000584:D2269_LT			
2											

Compute

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