RAMCO AVIATION SOLUTION

ENHANCEMENT NOTIFICATION

Version 5.8.7

Sales

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WHAT'S NEW IN CATEGORY?

Ability to do Pre-quote for Service Sales and create CO based on Re-Quote

Reference: AHBG-20155

Background

When it comes to servicing an aircraft or components of an aircraft, Airline Operators request quotes from multiple MRO's to service the aircraft / components of the aircraft. From all the quotes received the operator place an order with one of those MROs based on the most competitive quotation.

However, currently in such cases, the MRO does not have a firm contract with the customer, though the customer who is asking for the quotation might be a prospect. Also, the maintenance object (Aircraft / Component) specified by the operators as well as the work requested (Tasks) may not be available in the system.

Therefore the requirement is as follows:

- Provision has to be made to raise quote against the request received from the customer / prospect without any Contract or/ Customer order reference.
- Provision is required to create the customer order based on pre-quote once it is approved by the customer.

Change Details

- The existing pre-quote frame work available for Part sale to support Service Sale has been enhanced.
- A new tab '**Object Info.**' has been introduced in Pre-quotation to record the maintenance object information. (Core part info / Aircraft Info) in the **Manage Pre-Quotation** activity of the **Pre-Order Quotation** business component
- A new tab '**Primary Quote - Services**' has been introduced to enable specifies work scope and its pricing information in the **Manage Pre-Quotation** activity of the **Pre-Order Quotation** business component
- Provision has been made to generate the CO based on the Pre-quotation / Customer request in the **Manage Customer Order** activity of the **Customer Order – Services** business component.
- Provision has been made to view the pre-quotation for the generated order from Sale Quotation.

Exhibit 1:

Manage Pre-Order Quotation activity in the **Pre-Order Quotation** in the **Part Sale Management** business process

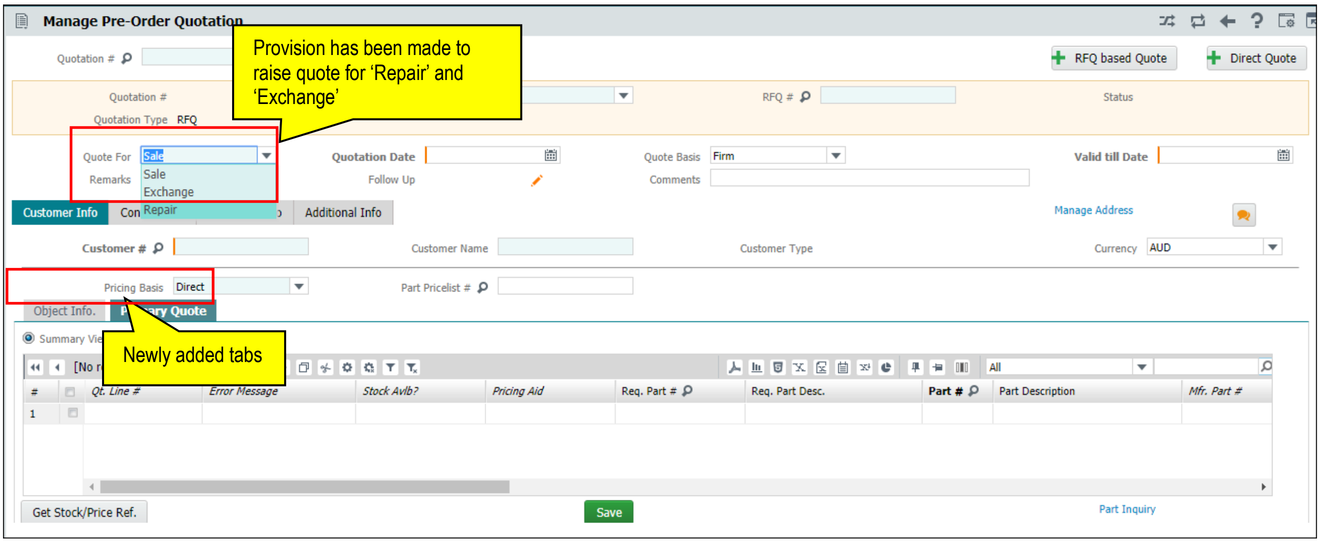


Exhibit 2:

Object Info. tab page in the **Manage Pre-Order Quotation** activity

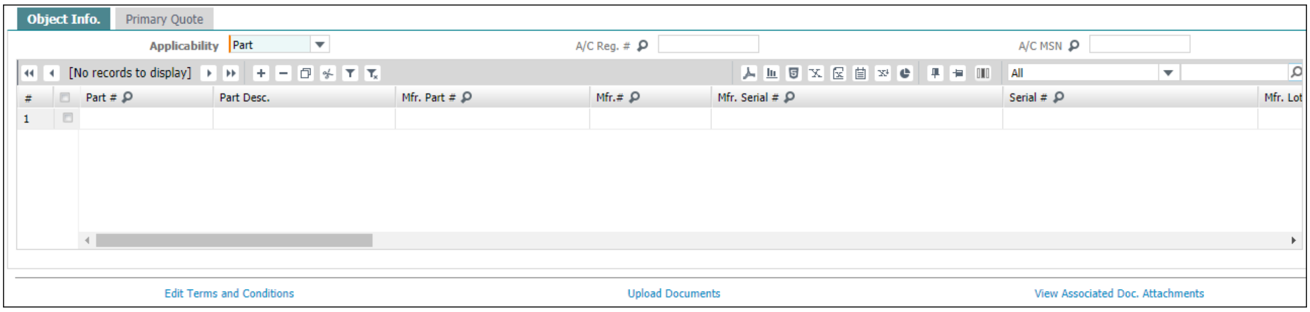


Exhibit 3:

Object Info. tab page in the **Manage Pre-Order Quotation** activity

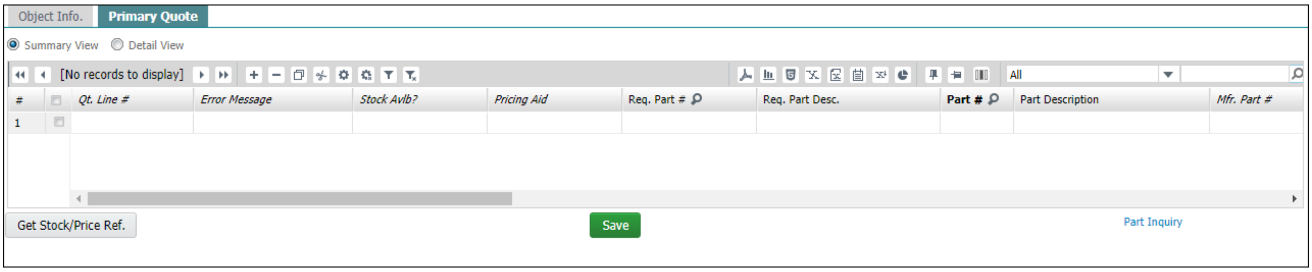


Exhibit 4:

Manage Customer Order activity in the **Customer Order – Services** of the **Service Sale Management** business process

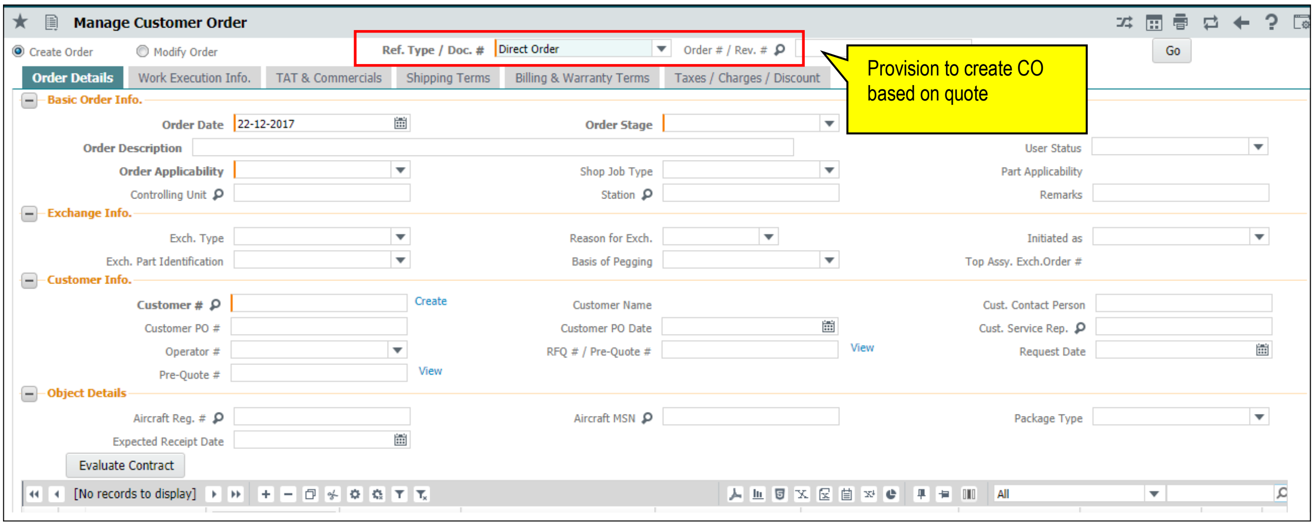
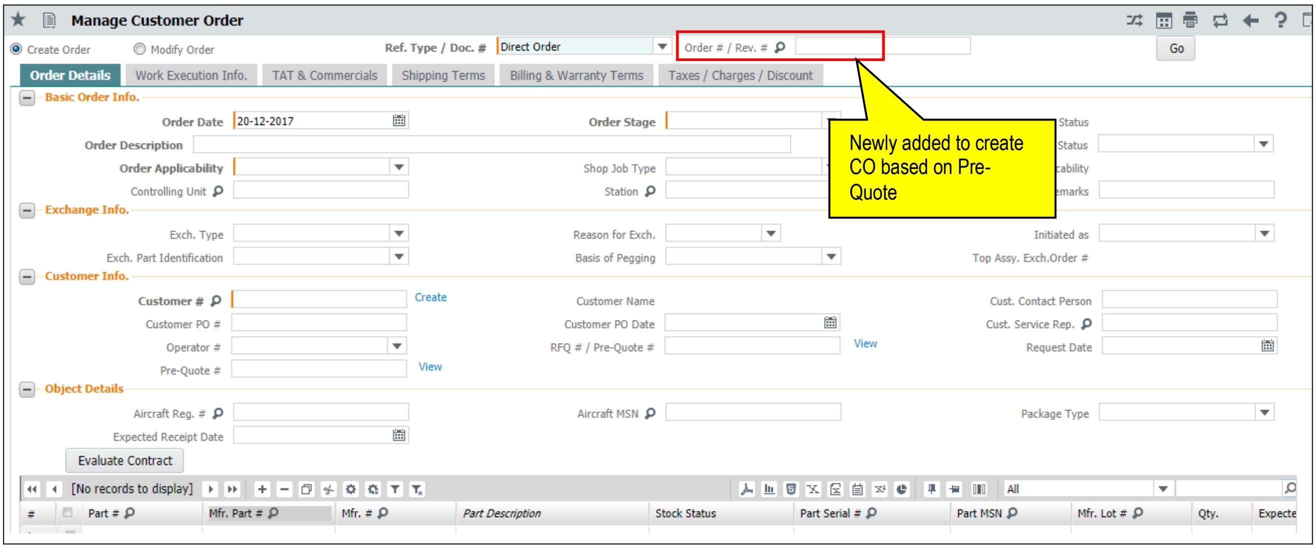


Exhibit 5:

Manage Customer Order activity in the **Customer Order – Services** of the **Service Sale Management** business process



*Note: The address ID of the supplier and the address ID of the company are the same as Tax Region From and Tax Region To in the **Manage Purchase Tax Rule** screen.*

WHAT'S NEW IN SALE CONTRACT?

Initiate hold based on the threshold limits of the parts and show the details of parts in Hold screen

Reference: AHBG-28140, AHBG-28498

Background

In Aviation, when it comes to maintenance of aircraft, engine or components, the commercials personnel is required to review the cost incurred on each job and ensure that cost of the job does not exceed the estimated limit. However, in some cases, for doing a job, high value part may be consumed or more number of resources may be used considerably increasing the cost incurred on the job, in such cases the commercial personnel will have to hold the job.

That is, either the job or the material consumption is put on hold and internal review is done to identify an alternate way to reduce the cost. For example, instead of consuming high value part, overhauled / serviceable part could be purchased from vendor at lower cost.

Therefore the requirement is for a provision to hold a task when the estimated cost of the task exceeds certain limit. Likewise, if the cost of the part is high, the materials issued for consumption is to be put on hold.

Change Details

Sale Contract

1. New parameters have been added under the Commercials category in the **Operational Parameters** tab under the **Manage Sale Contract** business component to capture if the cost based hold is required for the jobs that are performed under the respective contract's reference.

#	Element	Description	Permitted Values
1	Limit Based Hold	Applicability of Hold on Cost Exceedance	Enter: • '0' for Required • '1' for Not Required
2	Hold Event	Event of Hold Initiation	Enter: • '0' for Estimates • '1' for Actuals
3	Hold Escalation Level	Entity on which hold needs to be applied	Enter: • '0' for Task • '1' for Part
4	Cost Based Hold – Threshold Limit	Threshold limit beyond which hold needs to be applied	Specify the cost limit in Contract Currency beyond which hold needs to be applied

2. Provision for hold to be initiated either Actuals or Estimates.
3. Provision for the Hold Escalation level either Task or Part, as well as the cost limit beyond which the hold is to be applied.

4. Method of calculating the estimated cost of the part, if the hold is specified as 'Estimates'. Cost of the part is calculated either based on the rate of the parts in pricelist or based on the standard cost of the part.

Work Monitoring and Control

If cost based hold is set as required in the respective contract referred in the customer order, provision has been made to compute cost of tasks on confirmation of estimates.

Stock Issue

If cost based hold is set as required in the contract and Hold Event is specified as 'Actuals" then on creation and modification of issue, if the unit cost of the part is equal to / above the limit specified in the Contract, then the issue against the MR will be put on hold. The hold details are displayed in the **Hold/Release Order** activity as explained below.

Customer Service Order

The **Hold/Release Order** activity in the **Customer Service Order** screen has been enhanced to display details of parts and information on issue documents, including cost details if the hold is applied on the Issue document. The following details are displayed at part level in the multiline: Customer Order #, WO #, Task #, Task Desc., Task Seq. #, Doc. type, Triggering Doc #, Triggering Doc. Line #, Part #, Part Desc., Quantity, Value , Currency, Held By, Held Date & Time, reason for hold, Hold Code, Hold Description etc.

Exhibit 1:

Operational Parameters tab in the **Edit Terms of Execution** screen in the **Manage Sale Contract** activity of the **Sale Contract Services** business component

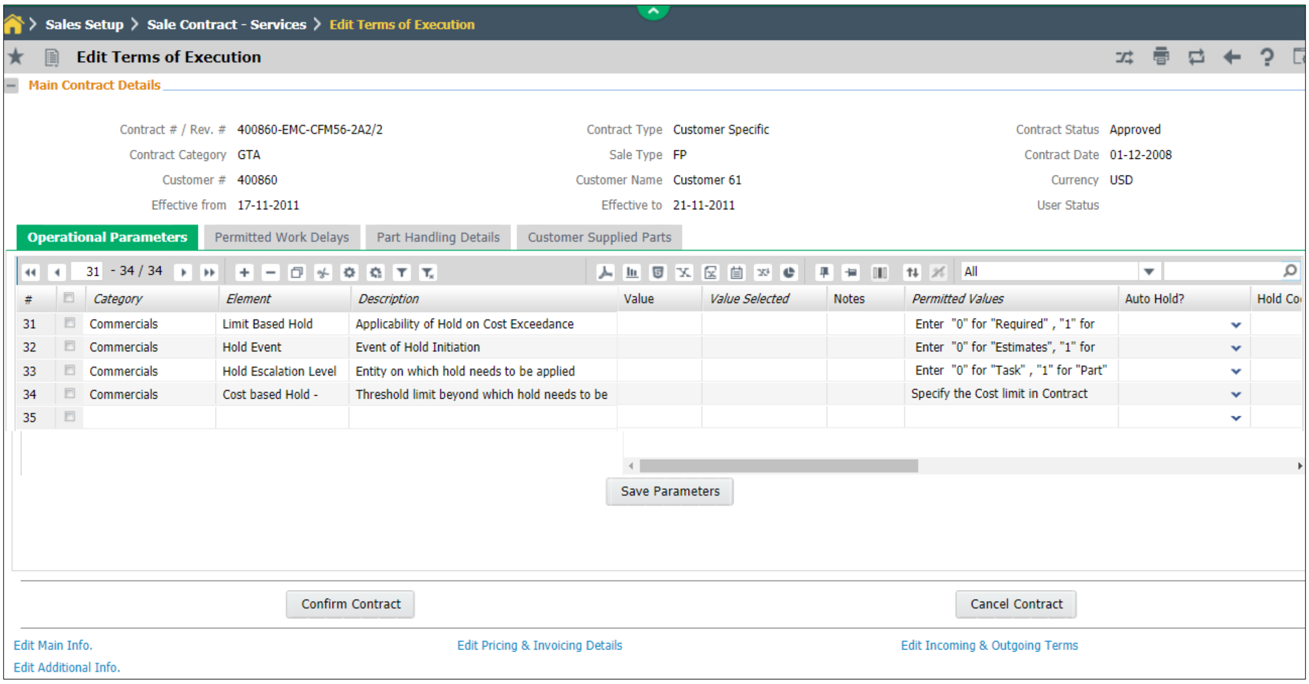
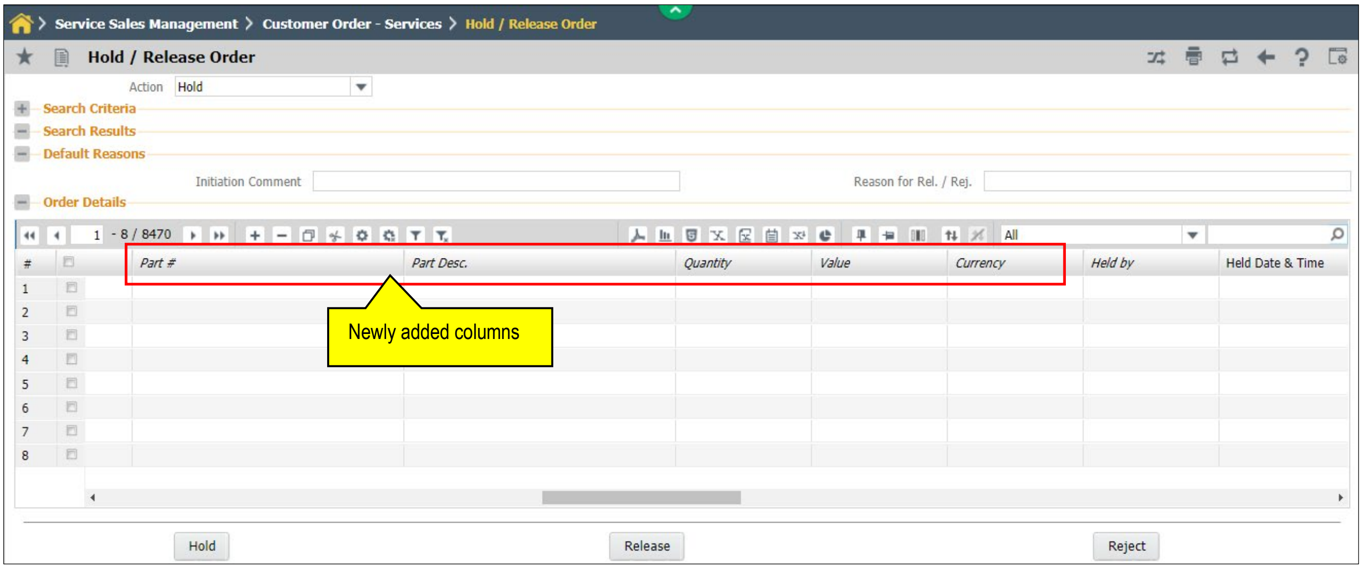


Exhibit 2:

Hold / Release Order activity in the **Customer Service Order** business component



Ability to define and compute TAT based on job priority

Reference: AHBG-29040

Background

In Aviation maintenance and repair, all tasks have some specific priority like for example it can be AOG Critical or even normal priority. In this the turnaround time of a job may vary based on the job priority. However, currently the Sale Contract does not support priority related TAT, hence the requirement is for a provision in the Contract to set TAT against priority. Also, due to the fact that priority of a job may vary during the execution process, provision is also required to accommodate such changes in priority to the TAT of the job.

Change Details

- A new column 'Priority' has been added in the multiline of **TAT-Aircraft** and **TAT-Parts** tabs in the **Manage Sale Contract** activity under the **Sale Contract - Services** business component.
- In the **Manage Customer Order** activity of the **Customer Service Order** business component TAT computation will be based on the priority of the job selected from CO or GI that is priority given under the 'Work Execution Info.' tab and comparing it with the priority in the TAT tab of the evaluated contract, along with all other applicable parameters.
- Also on contract evaluation, if the Contract # / Rev. # is modified, the system will re-compute TAT along with the other pricing related parameters based on the revised Contract.
- If Priority is modified during the execution of the job in Work order/package, the system will re-compute TAT based on revised parameters from the Contract.

Exhibit 1:

TAT - Aircraft tab in the **Manage Sale Contract** activity under the **Sale Contract** business component

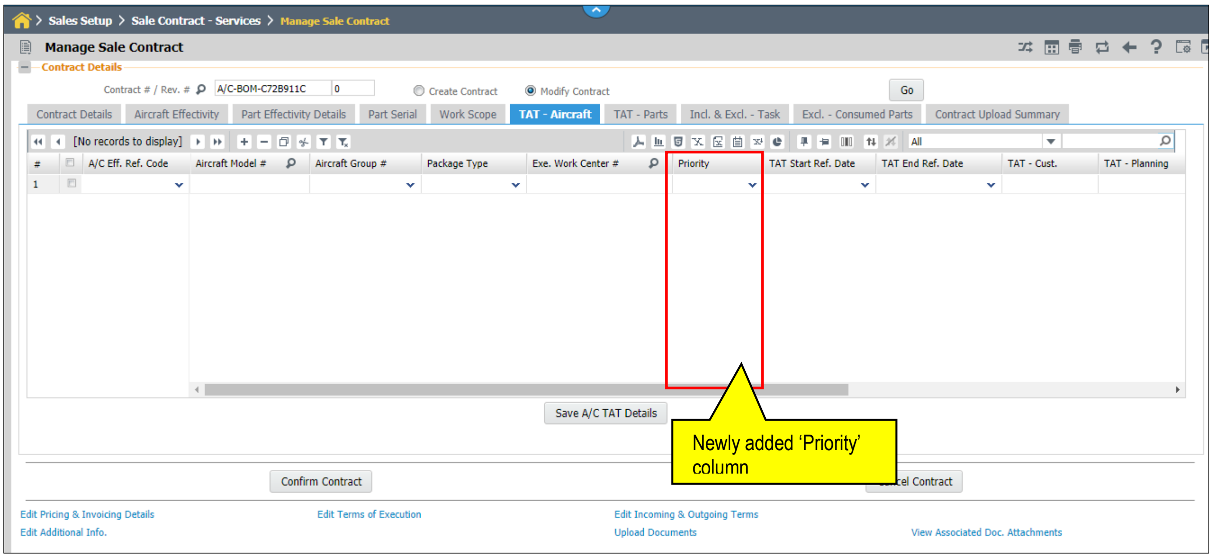
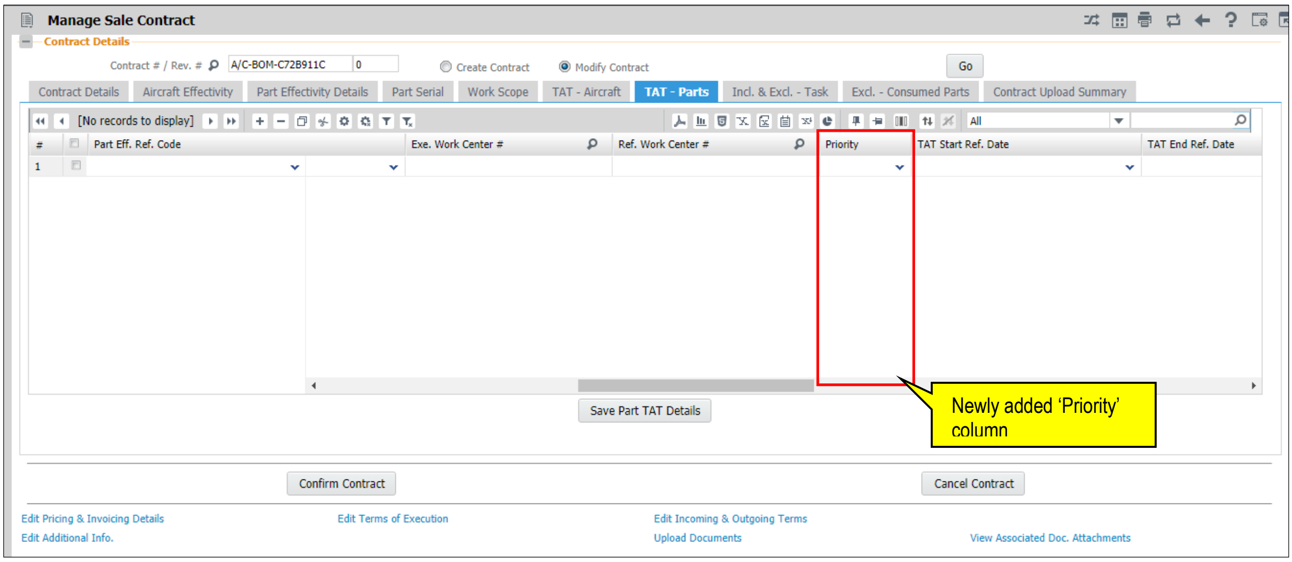


Exhibit 2:

TAT - Parts tab in the **Manage Sale Contract** activity under the **Sale Contract** business component


Manage Sale Contract
Contract Details
Contract # / Rev. #
A/C-BOM-C72B911C
0
Create Contract
Modify Contract
Go
Contract Details
Aircraft Effectivity
Part Effectivity Details
Part Serial
Work Scope
TAT - Aircraft
TAT - Parts
Incl. & Excl. - Task
Excl. - Consumed Parts
Contract Upload Summary
[No records to display]
All
#
Part Eff. Ref. Code
Exe. Work Center #
Ref. Work Center #
Priority
TAT Start Ref. Date
TAT End Ref. Date
1
Save Part TAT Details
Newly added 'Priority' column
Confirm Contract
Cancel Contract
Edit Pricing & Invoicing Details
Edit Terms of Execution
Edit Incoming & Outgoing Terms
Edit Additional Info.
Upload Documents
View Associated Doc. Attachments

Ability to set a Billing End Ref. date against Aircraft/Billing Element and stop billing from given date

Reference: AHBG-28074

Background

When it comes to maintenance billing, the Billing Element or an aircraft is evaluated based on certain billing reference dates where Monthly Fixed Charges are billed periodically every month. Moreover when an aircraft is commissioned out of service, the aircraft must be stopped from the billing process.

Therefore, the requirement is to set a Billing End Reference Date against an aircraft or Billing Element and stop the billing process from the given date.

Change Details

- Provision has been made for Billing Ref. Date type, Billing Start Ref. and Billing End Ref. to be captured against each Billing Element in the **Billing Ref. Date Details** activity under the **Sale Contract** business component.

- Provision is already given for the actual dates to be captured against the aircrafts in the **Maintain Object Ref. Date** activity in the **Sale Contract** business component.

  A new combo 'Date Type' with the following drop-down options have been introduced in the **Maintain Object Ref. Date** activity in the **Sale Contract** business component to identify Start or End date

  - Billing Start Date
  - Billing End Date

Based on the above set dates, when the Billing End date has been achieved for an Aircraft, the aircraft will no longer appear for billing in any of the milestones. If the Aircraft is the only one eligible for billing in the milestone and the end date has been achieved, then the milestone itself would no longer be applicable for billing and hence would be inactivated. Once the aircraft is made to be eligible for billing again, the milestone would be activated for billing automatically.

Exhibit 1:
Billing Ref. Date Details link in the **Inv & Payment** tab in the **Edit Pricing & Invoicing Details** screen under the **Sale Contract - Services** business component

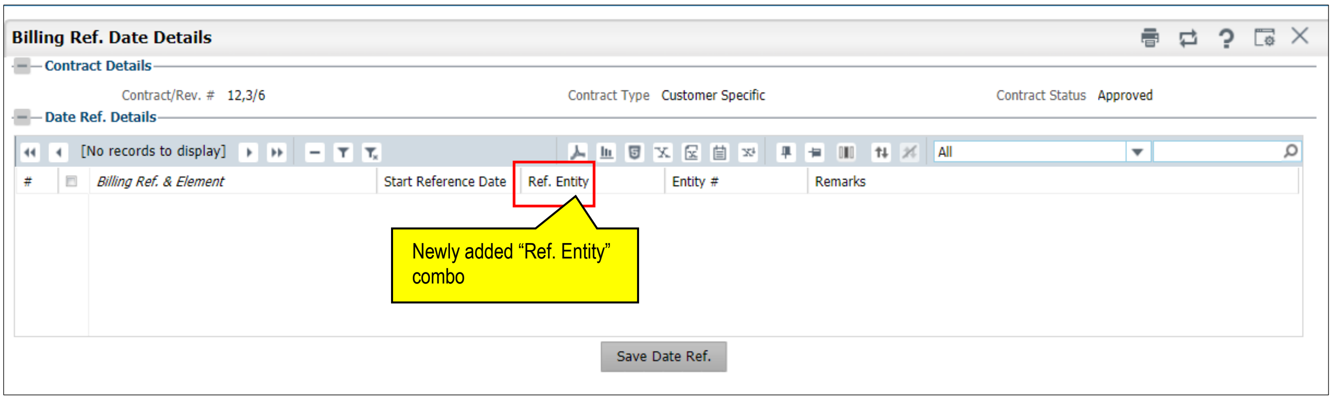
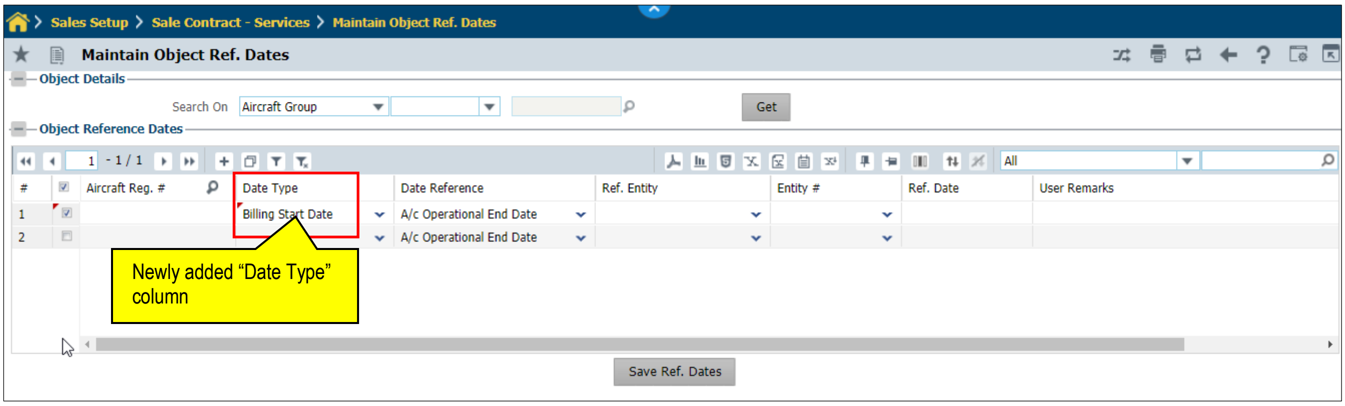


Exhibit 2:

Maintain Object Ref. Dates activity in the **Sale Contract - Services** business component



Ability to modify Object Ref. Dates even after Release Generation

Reference: AHFG-11104

Background

Monthly Invoice Releases have been given a provision with which the start reference dates for billing can be set in Contract. With regards to these reference dates, there might be situations in which the start reference date might get extended. Considering an example where the Warranty End Date for an aircraft may have been achieved and the customer may have already been billed for out of warranty fees as well. However, there might have been some enhancements made to the aircraft equipment that in turn would give a new Warranty End Date, in other words, the Warranty End Date now stands extended.

In such cases, there is a need to modify the Billing Reference Date even if the date is in the past and invoices have already been generated.

Change Details

Sale Contract

1. Ability to change the reference dates in **Maintain Obj.Ref Dates** activity and being able to change the dates even though the release has been generated for the same aircraft with respect to the same reference date.
2. The user can either extend a given date or pre-pone the date as required.

Service Sale Billing

- If the reference date is extended, the system automatically cancels all the pending milestones that are not yet achieved in accordance with the dates that are maintained in the **Maintain Object Ref. Date** activity of the **Sale Contract** business component.

- The system cancels all the milestones that have been achieved but not yet billed.

  Note: Releases that are in Fresh, Confirmed or Invoiced statuses remain unaffected.

If the reference date is preponed:

- New milestones will be setup starting from the date that has been provided.

WHAT'S NEW IN SALES TAX RULES AND FLIGHT BILLING?

Provision to Default Sales Taxes in Customer Flight Contract Invoice

Reference: AHBG-29111

Background

MROs raise Flight Contract Invoices to its customer for the services rendered by them. In India with GST, TDS etc. being applicable on all the services, there is a need to auto default the taxes in all the Invoices (including the Flight Contract Invoice) based on the Sale Taxes Rules

The requirement is therefore for TDS/GST to be automatically defaulted in the Customer Misc. Invoice for Flight Contract Services on invoice generation.

Change Details

- A new document type ' Customer Misc. Invoice - Flight Contract Based' has been introduced in the **Manage Sales Tax Rules** activity of the **Sales Tax Rules** business component to define the Sales Tax Rules applicable based on the applicable parameter.

  Note: The taxes defined under the Sales Tax Rules will be defaulted in the Customer Misc. Invoice based on the parameters.

- An 'Address ID' field has been added in the **Manage Flight Invoice Release**, activity of the **Flight Billing** business component. This field defaults the Address ID mapped to the Finance Book in the Contract. The Tax Region mapped to this Address ID will be considered for the 'Tax Region From' and the Tax Region mapped to the 'Bill to Address ID' of the customer for whom the Invoice release is being generated will be considered as 'Tax Region To'.

Exhibit 1:

Manage Sales Tax Rules activity of the Sales Tax Rules business component

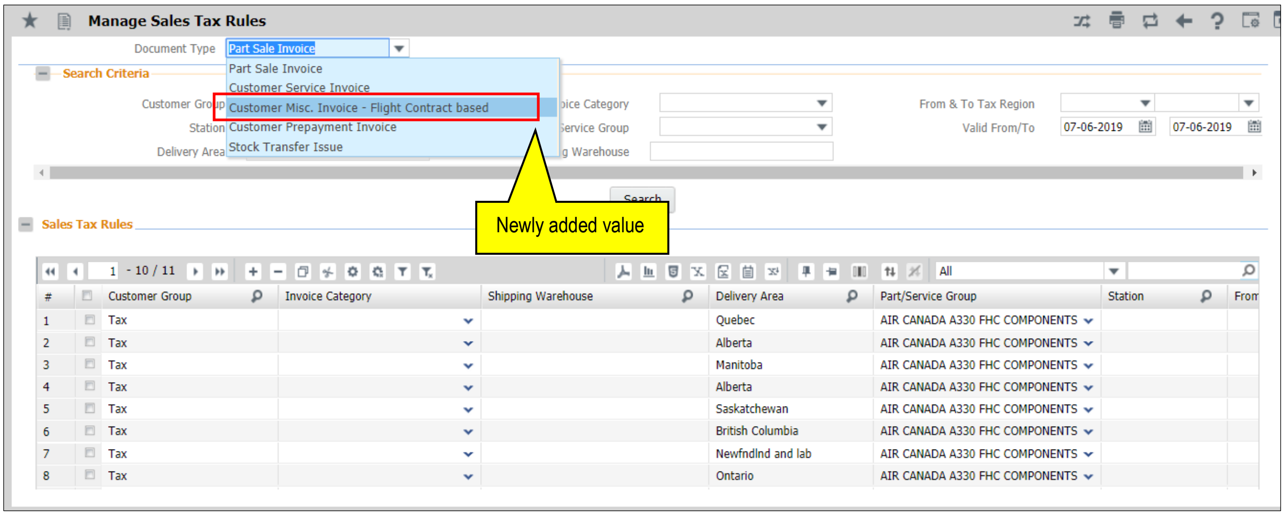
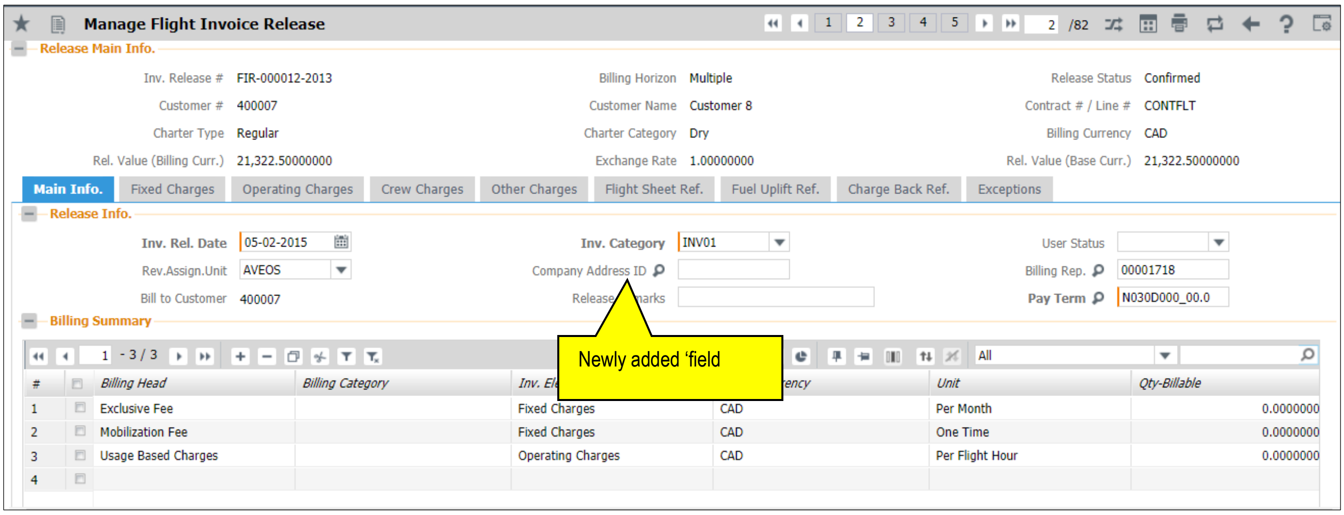


Exhibit 2:

Manage Flight Invoice Release, activity of the **Flight Billing** business component



WHAT'S NEW IN PART PRICELIST?

Ability to define slab based Base Adj. Factor and Price Factor in Part Pricelist

Reference: AHBG-25148

Background

When it comes to customer aircraft / component maintenance, MROs supply spare parts from their own inventory based on the requirement and the consumed spare parts are priced to the customer along with some Markup.
However, each MRO has different pricing policies when it comes to fixing the basic rate of the part to be priced to customer, such as follows:

1. Reference - OEM / CLP rate of the part.
2. Based on the Actual Cost along with some mark up.
3. Multiple price catalogues received from Vendors and reference to the highest rate of the part available in those catalogues.

Pricing of Serviceable Parts: Whenever used parts are consumed, certain percentage of CLP rate / OEM rate is considered for billing. However, such percentage of CLP considered for billing varies based on the rate of the part.
Example
Rate of part is 1-1000 USD, - 70% of CLP / OEM rate is considered for billing.
Rate of the part is above 1000 USD - 50 % of CLP / OEM rate is considered for billing.

Markup based on slab: Similar to the above case, based on the rate of the part, Markup % to be applied on the rate of the part also varies.
Example
Rate of the part is 1 - 1000 USD - 5 % Markup to be applied.
Rate of the part is above 1000 - 3 % Mark-up to be applied.

Therefore the requirement is for a provision to arrive at a basic rate for serviceable parts based on its CLP / OEM rate. Also provision is required to apply differential mark-up based on the rate of the part.

Change Details

1. A new column 'Slab Definition For?' has been added in the multiline of the 'Factored Pricing' tab in the **Manage Part Pricelist** activity to capture whether a slab based definition is required for the respective pricing line or not. Options available to specify if the slab is required for Base Adj. factor / Price factor or both.
2. A new tab 'Slab Definitions' has been added in the **Manage Part Pricelist** activity to provide the differential Base Adj. Factor and Price Factor based on various slabs.
he set option 'Source Catalogue for slab rate computation' for the parameter Part Pricelist has

3. been removed from the **Set Sales** Process **Parameters** activity in the **Customer** business component as it will not be a source for slab computation any more.

Exhibit 1:

Set Sales Process Parameters activity in the **Customer** business component

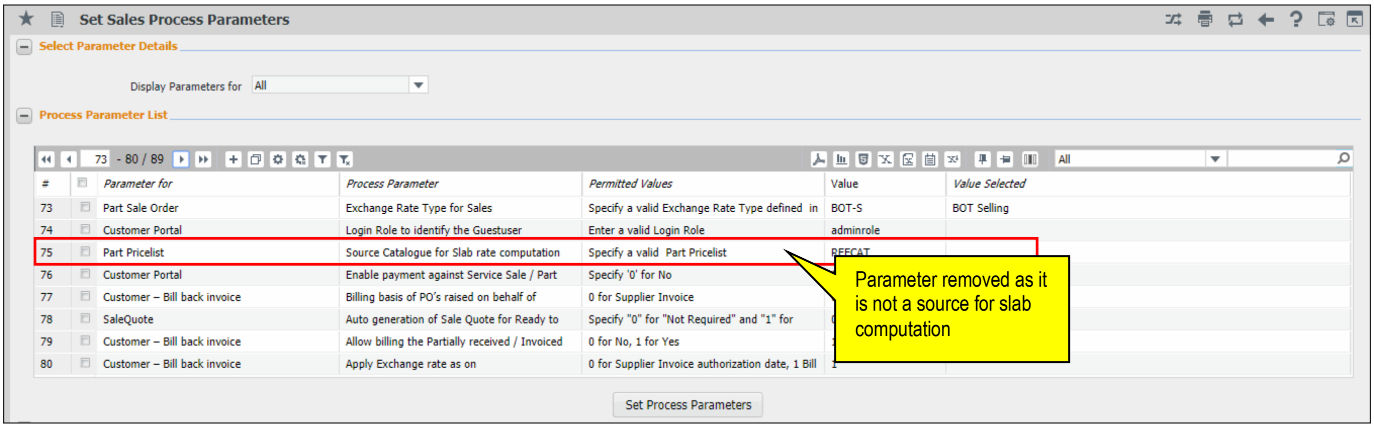


Exhibit 2:

Factored Pricing tab page in the **Manage Part Pricelist** activity

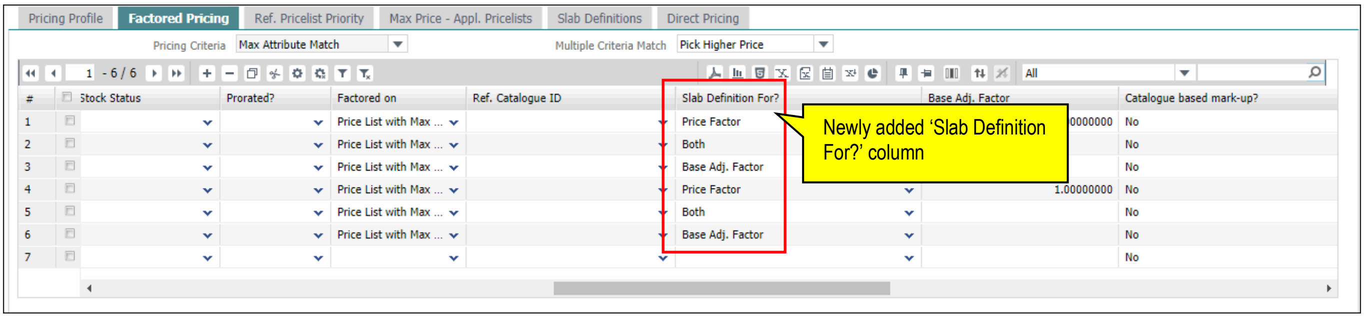
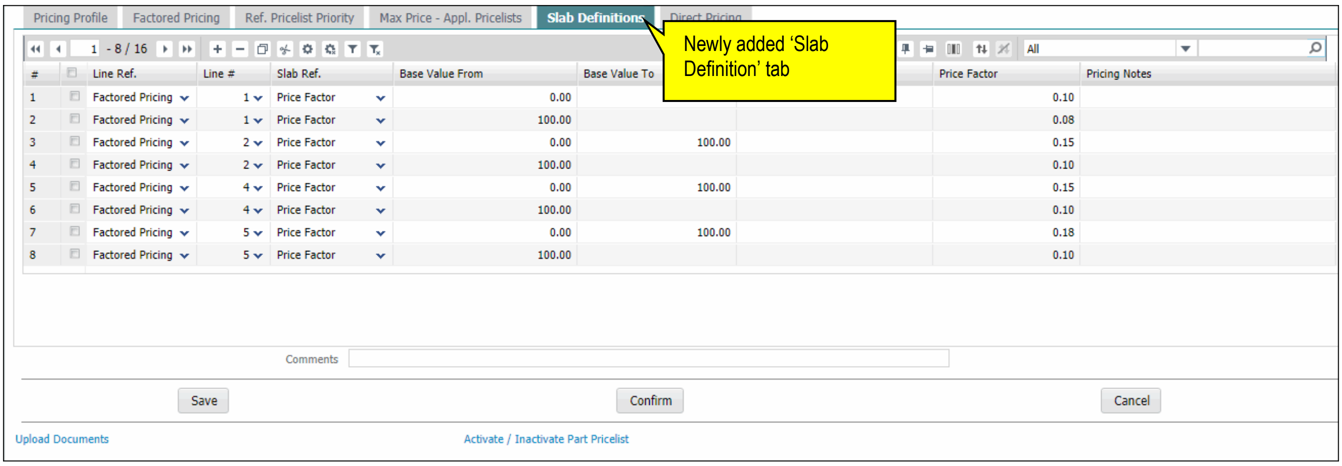


Exhibit 3:

Slab Definitions tab page in the **Manage Part Pricelist** activity



WHAT'S NEW IN TIME TRACKER?

Ability to capture corrective actions and travel locations as additional information against time records

Reference: AHBG-25389

Background

During aircraft maintenance, sometimes, the mechanics or technicians involved may be required to travel to the location of the aircraft to rectify the issues reported by the customer. For this the customers are charged for the hours the technicians spent in the travel involved. Hence, there is a need to track the travel duration along with the location details (from location and destination) since the location details impact the charges that are applicable.

Also during such maintenance services, the mechanics involved in rectifying defects or discrepancies in the aircraft are expected to book and track man hours against each of the corrective action done to rectify the issue reported. However, currently the capability in system permits time booking only against a Task/Discrepancy. Therefore, the requirement is to enable time booking against a corrective action while working on it.

Change Details

1. Time booking against Travel Task can be made with some comments and with the start and end location of the travel while booking time from the Package.
2. The same details will be displayed in the Time and Attendance with the exact details provided.
3. A parameter in Maintenance module will identify the level in which time booking will be done. - Discrepancy level or Corrective Action level.
4. If the parameter is set for Corrective Action level, then every clock on and off done will automatically be registered against the latest Corrective Action recorded.
5. Manual booking can also be done against a corrective action in T&A under the Timesheet-Manual screen.

Authorize Time Records

Timesheet Details tab page

Four new columns have been added in the multiline as follows:

1. Addl. Info. -1 - For travel tasks, indicates the start location
2. Addl. Info. -2 - For travel tasks, indicates the end location
3. Addl. Info. 3 (display only) – Indicates corrective action taken against a discrepancy
4. Re-Book Ref. (display only) – The reference number indicating the rejected time record

A new drop-down value 'Rejected Records' has been added in the 'Display Option' drop-down list box under the Search Criteria section to retrieve all the records that were rejected earlier.

Time Tracking

Timesheet – Manual tab

Three new columns have been added in the 'Time Details' multiline:

1. Addl. Info. - 1– For travel tasks, indicates the start location
2. Addl. Info. - 2 - For travel tasks, indicates the end location
3. Addl. Info. - 3 - Indicates corrective action taken against a discrepancy. While booking a time record manually, user can use the help icon to select a Corrective action from the package to book the time against.
4. Re-book Ref. – Indicates the reference number indicating the rejected time record

A new button 'Re-book Time' pushbutton has been added.
On click of 'Re-book Time' pushbutton, the system saves the new record with the reference of the rejected record stamped against this new record against the Re-Book Ref. column in format given below:
Booking Code - Activity Code - Reported Date & Time-Dur (Hrs)

Exhibit 1:

Timesheet Details tab page in the **Authorize Time Records** activity under the **Time Management** business component

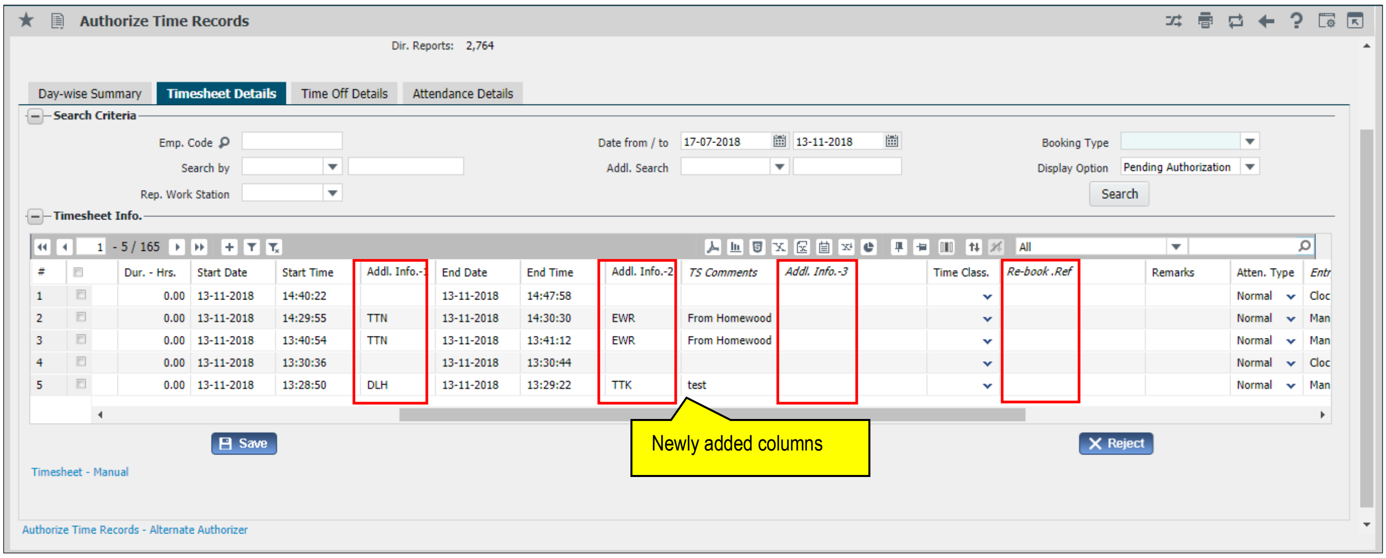
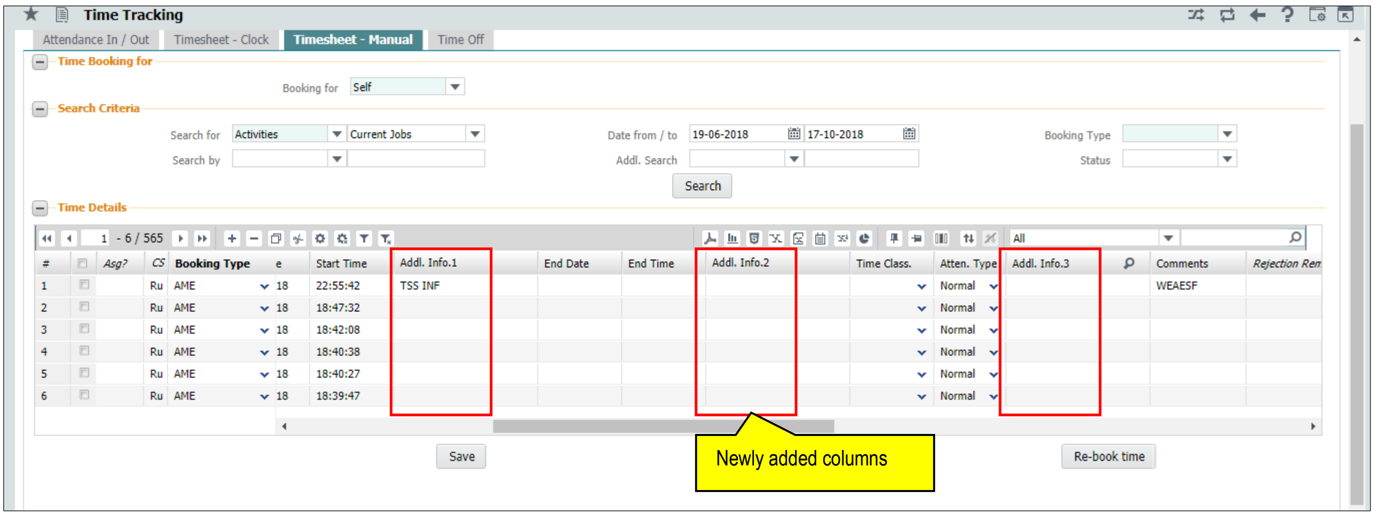


Exhibit 2:

Timesheet – Manual tab page in the **Time Tracking** activity under the **Time Management** business component



WHAT'S NEW IN SERVICE SALE QUOTE AND SERVICE SALE BILLING?

Ability to generate Warranty Claims and Invoices and with different pricing

Reference: AHBG-27850

Background

When it comes to billing under Warranty Claims, tasks that are not covered under Warranty are billed to the customer, but tasks that are covered under Warranty must be billed to the respective Warranty provider.
Therefore the requirement here is to invoice the jobs covered under Warranty to the OEM by setting up a set up a separate Invoice Release for the Warranty provider (Bill to Customer) where the rates and elements can be reviewed before raising the finance Invoice.

A claim may or may not be priced with same rates as that of the customer. However, the claim document must be sent to the OEM for approval and the customer quote must have details of the jobs covered under warranty along with customer rates.

Therefore the requirement is for a provision to generate Warranty Claim for customer jobs covered under the OEM warranty

Change Details

1. In the **Edit Customer Main Information** link under the **Customer** business component, a new value 'Warranty Provider' has been added to identify customer as OEM.

2. The 'Price List Information - Service Sale' section, that is, Service Price List and Part Price List in the **Edit Commercial Information** activity under the **Customer** business component will be utilized for Warranty pricing in case the Customer is identified as 'Warranty provider'.

3. In the 'Definition For' section of the **Manage Additional Options** activity under the **Customer** business component, a new category 'Warranty Claims & Billing' has been introduced to capture warranty documents related parameters.
    a. Parameters such as 'Currency to be considered for Warranty Claims' and 'Default Pricelists for Warranty Claims/Bill' decide the pricing for warranty billing. Organization could choose to price warranty provider at different rates as compared to Customers.

<u>Impact in Sale Quotation</u>

1. In the 'Ref. Info' section of the **Manage Sale Quotation** activity under the **Service Sale Quote** business component, two columns have been introduced in the 'Quote Ref. Details' multiline as given below:

    - Warranty Provider - Indicates the customer identity as OEM
    - Warranty Status - Indicates the status of the claimed value.

Separate Quote document has been set as 'Warranty Claim' with all the tasks/elements of jobs that are covered under warranty.

Note: Warranty provider has to be manually provided while resolving warranty in quotation.

Provision has been given to identify multiple Warranty providers against different tasks, hence there will be one Warranty claim document generated against each Warranty provider identified. Warranty Claim quote will be automatically generated based on the Warranty resolution provided in Customer quote, on confirmation of Customer Quotation.

The status of Warranty quotation can be tracked and reviewed within Customer quote against each Task with the Warranty status against the respective lines.

2. In the **Reg. Billing Info.** tab in the **Manage Invoice Release** activity under the **Service Sale Billing** business component, the CO# field has been moved to the main page header

Note that the Release # field will display the CO# for Customer release and different number for Warranty Release

Separate Regular release has been set for the tasks identified under Warranty with the Warranty provider as the Bill to Customer with same CO# as reference. The Warranty release based on either an Approved Warranty claim or directly from a Customer Release, will be generated automatically on processing the Customer Release. The warranty release will be processed and generated as a separate Customer Invoice for the Warranty Provider as the Bill to Customer.

Exhibit 1:

The **Edit Customer Main Information** activity under the **Customer** business component

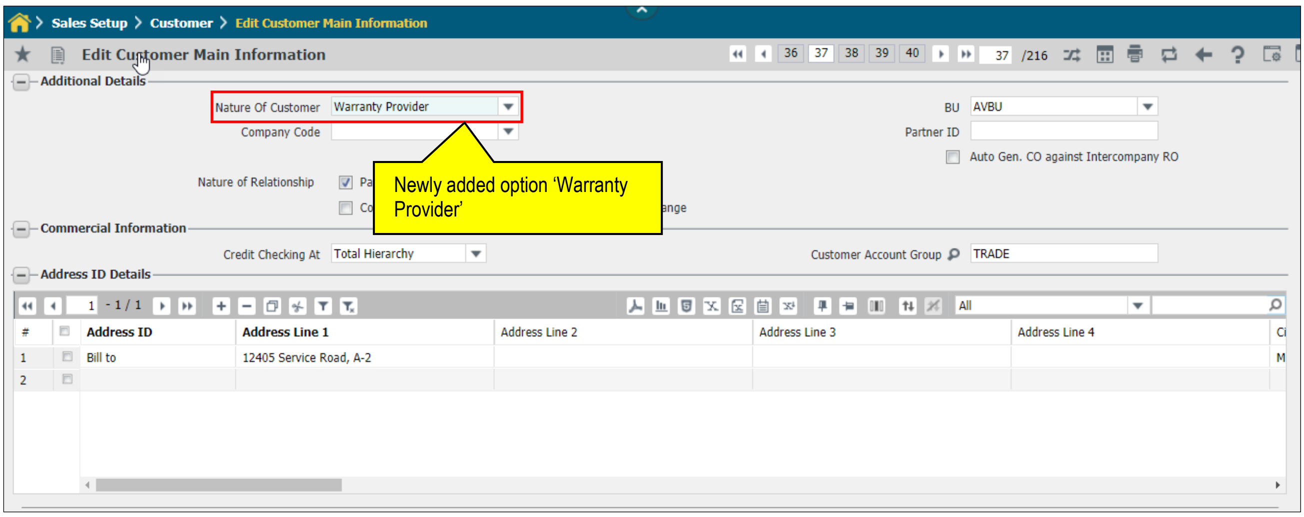


Exhibit 2:

The **Edit Commercial Information** activity under the **Customer** business component

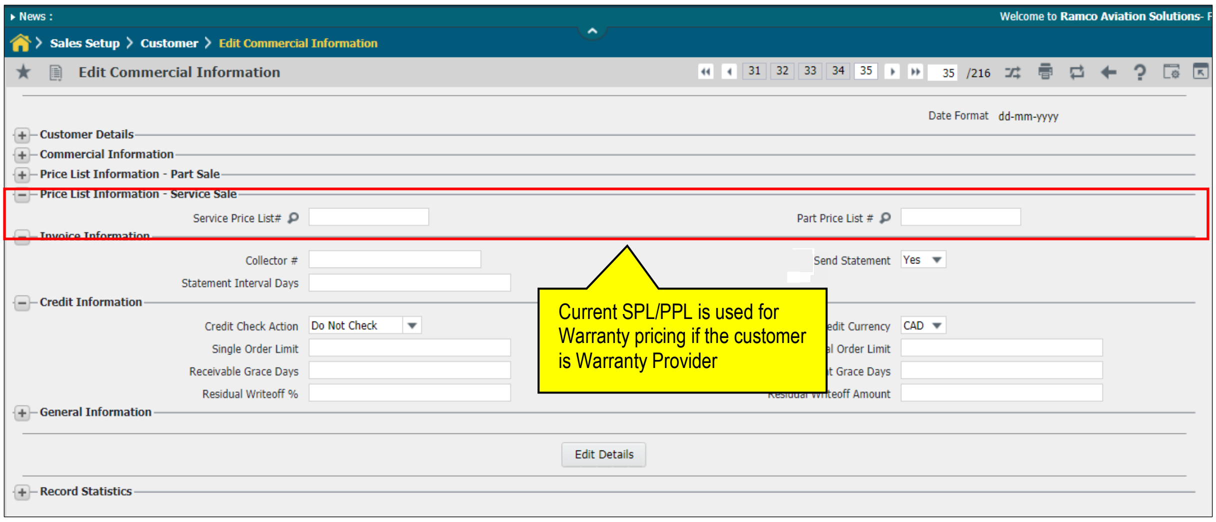


Exhibit 3:

The 'Definition For' section of the **Manage Additional Options** activity under the **Customer** business component

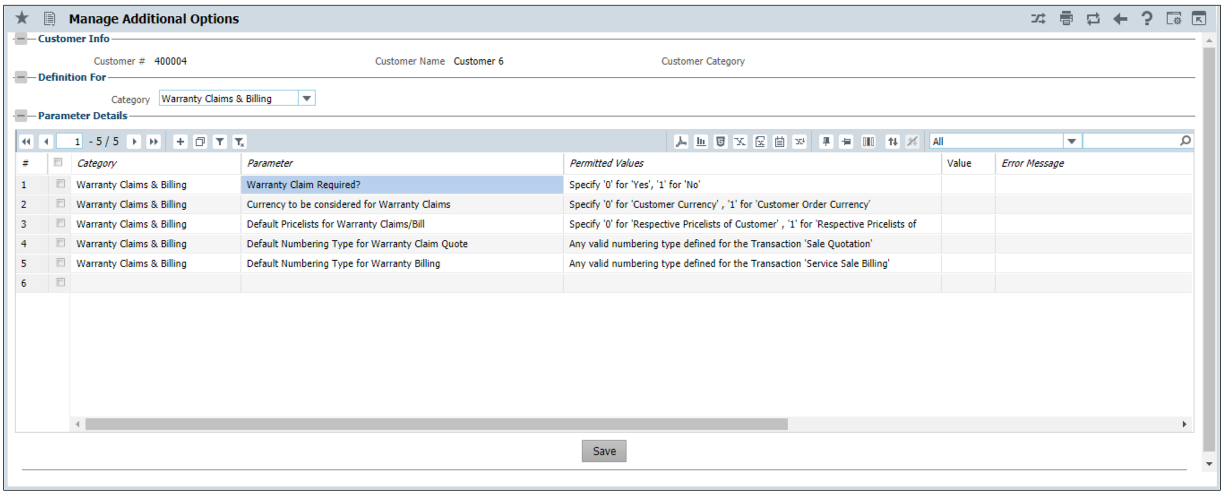


Exhibit 4:

'Ref. Info' section of the Manage Sale Quotation activity under the Service Sale Quote business component.

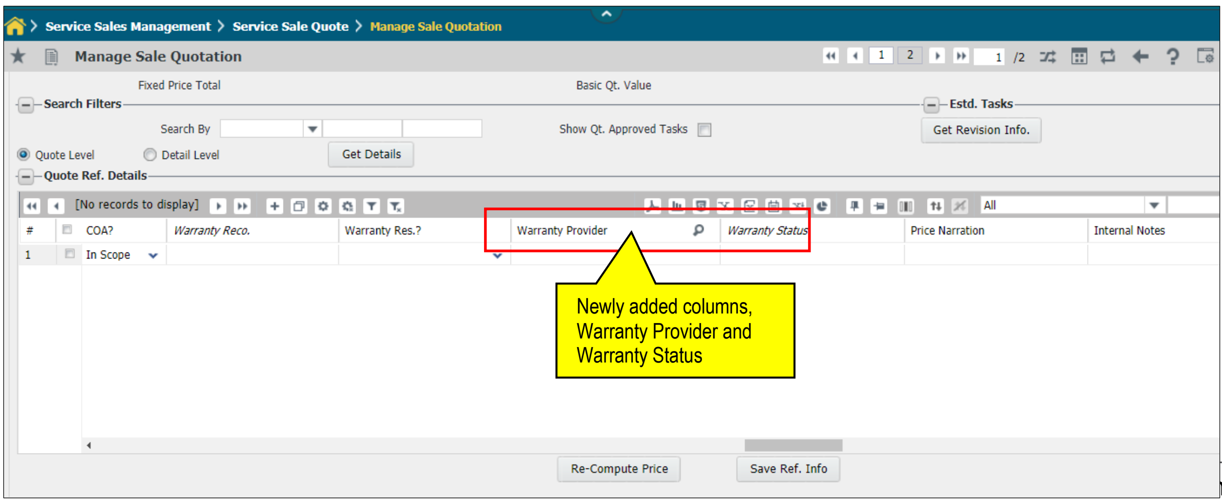


Exhibit 5:

Select Customer Order – services screen under Manage Sale Quote Activity

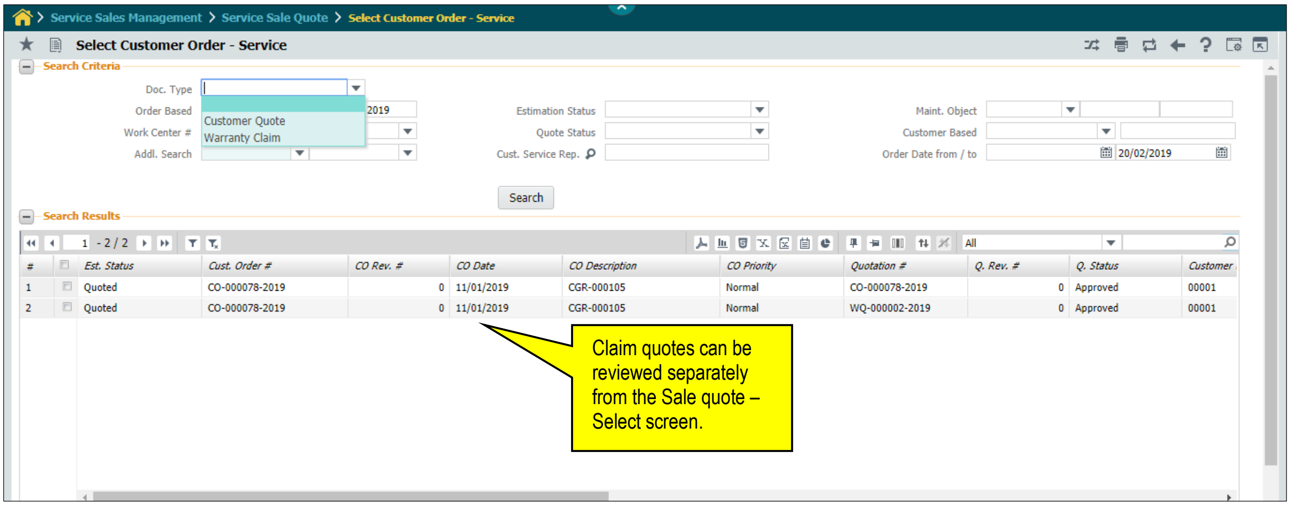


Exhibit 6:

Reg. Billing Info. tab in the **Manage Invoice Release** activity under the **Service Sale Billing** business component

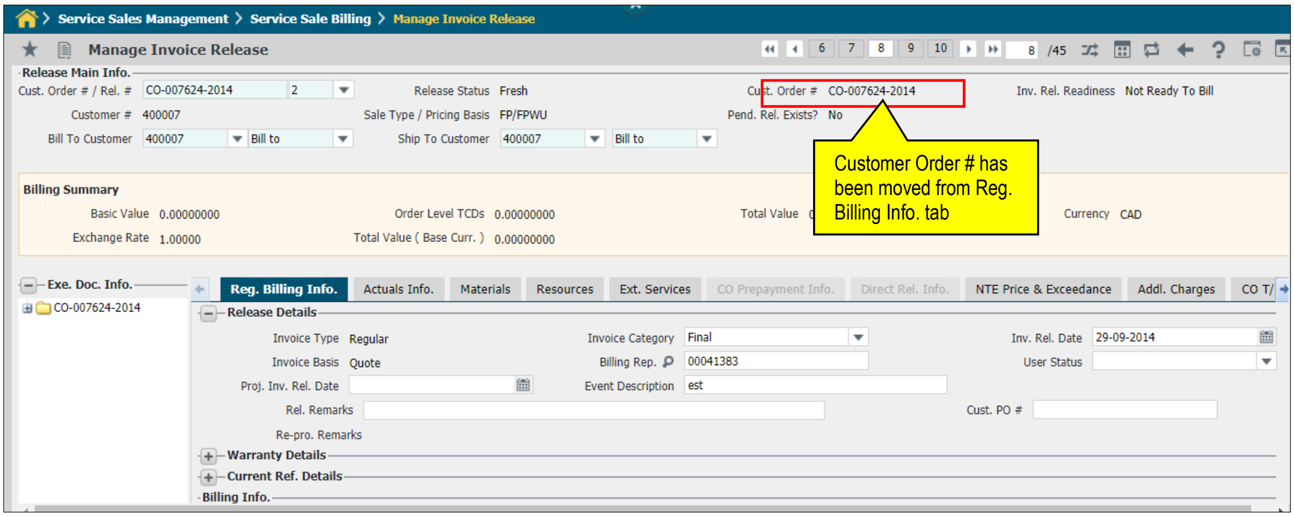
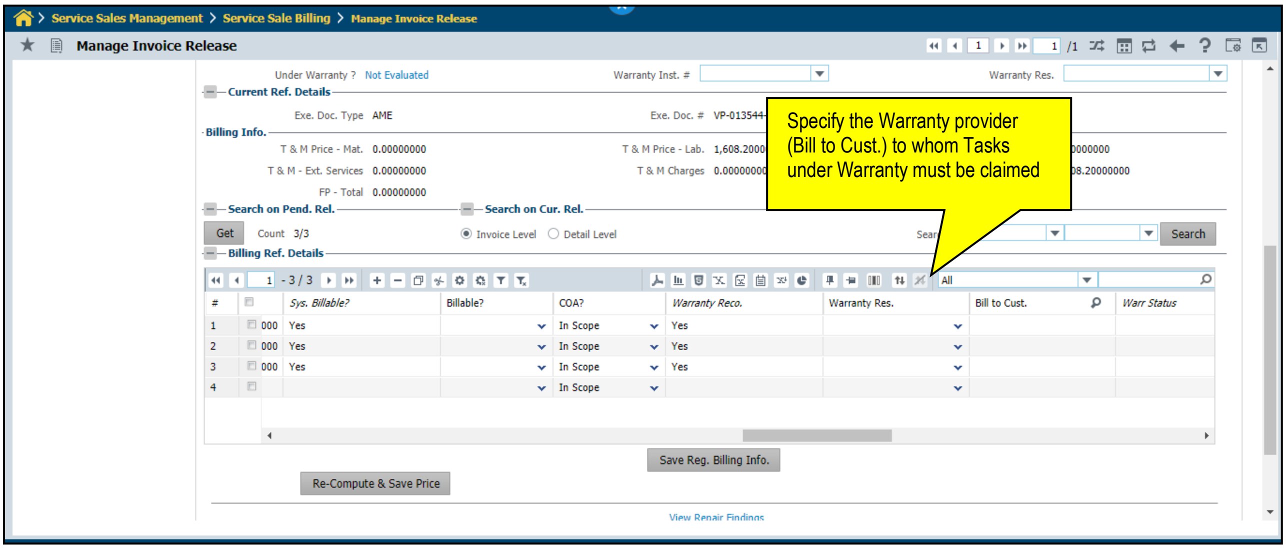


Exhibit 7:

Warranty resolution against Task under **Reg. Billing Info.** tab


Service Sales Management > Service Sale Billing > Manage Invoice Release
Manage Invoice Release
Specify the Warranty provider (Bill to Cust.) to whom Tasks under Warranty must be claimed
Re-Compute & Save Price
Save Reg. Billing Info.

Ability to provide a summarized view of time information against travel tasks and corrective actions in invoice release to modify the same

Reference: AHBG-25855

Background

When it comes to aircraft maintenance, with regard to AOG, that is aircraft on ground maintenance work, MROs send their mechanics or technicians to the respective location to perform maintenance work. During billing, the commercial department personnel needs to review the time taken by their Mechanics or Technicians for travel as well to perform maintenance. Price adjustments will happen based on the time taken to travel.

Added to that, corrective actions for discrepancies done by the Mechanics/Technicians will also be reviewed by commercial departments during Maintenance Execution. The time records booked by every individual Mechanic/Technician against each corrective action will be reviewed and modified if required.
Finally the time sheet and corrective action details against the tasks will be sent to the customer with the invoice report

Change Details

1. A new set option "Labour Quantity Modification in Invoice Release" has been added for the parameter Service Sale Billing in the **Set Sales Process Parameters** activity in the in **Customer** business component. This is to capture the level at which resource quantity modification is to be done. It can be either at Skill Level or Employee timesheet level.
   Permitted Values: Specify '0' for 'Skill Level and '1' for 'Employee Timesheet Level'

   Note that even if the parameter is not set, the user will be able to do quantity modification for labour in Invoice Release at skill level as per the existing functionality.

   If it is skill level, quantity modification can be done only under 'Resource Pricing' multiline.

   If it is at employee timesheet level, modification can be done only in Employee Timesheet multiline / Work Details tab.

   Work Details popup: In the 'Employee Timesheet' multiline, provision has been given to add / modify the existing time records as per the above mentioned set option. In employee time sheet, flexibility has been provided to modify the Work Details information. The commercial user can modify the work details specified against a discrepancy task by clicking the search icon in the Work Details column, a popup launches with a list of corrective actions recorded against the selected discrepancy in both Execution Document and Invoice Release. This popup will display the corrective action recorded during execution as well as any corrective action / work details added by a commercial user against respective discrepancy task.

   Note: On click of View timesheet icon against Work Detail (Corrective Action) in the Work details multiline, time records applicable for the respective Task # and Corrective Action combination alone will be retrieved in the Employee Timesheet Multiline.

Note: On modification of duration information as well as deletion of any time record in the Employee Timesheet multiline, to ensure if the quantity modification is allowed at employee timesheet level, the set option 'Labour Quantity Modification in Invoice Release' in the ***Set Sales Process Parameter*** *activity must be set as "allowed".*

2. A new section "View Timesheet Info." has been added under the **Resource** tab of the **Manage Invoice Release** activity of the **Process Invoice** business component to retrieve the Corrective Action and Time Sheet information of the tasks selected. Two multiline, 'Work Details' and 'Employee Timesheet' will be displayed under this section.

   - Work Details Multiline: Displays details of the corrective action of the task selected in the 'Resource Pricing' multiline provided the task is of type 'Discrepancy'. Also, information about the number of employees worked against each corrective action and the number of hours logged by those employees is displayed in this multiline. The user has the provision to add new corrective action and also delete or amend the existing line.

   - Employee Timesheet Multiline: Displays the time records pertaining to the task selected in the Resource Pricing multiline. Added to this an icon will be displayed against every corrective action, on click of which the time records booked against that particular corrective action will be displayed in the Employee Time Sheet multiline.
     Also provision has been given for modification of time records and addition of new time records against existing Task - Corrective action combination.

Exhibit 1:

Set Sales Process Parameters activityin the **Customer business** component

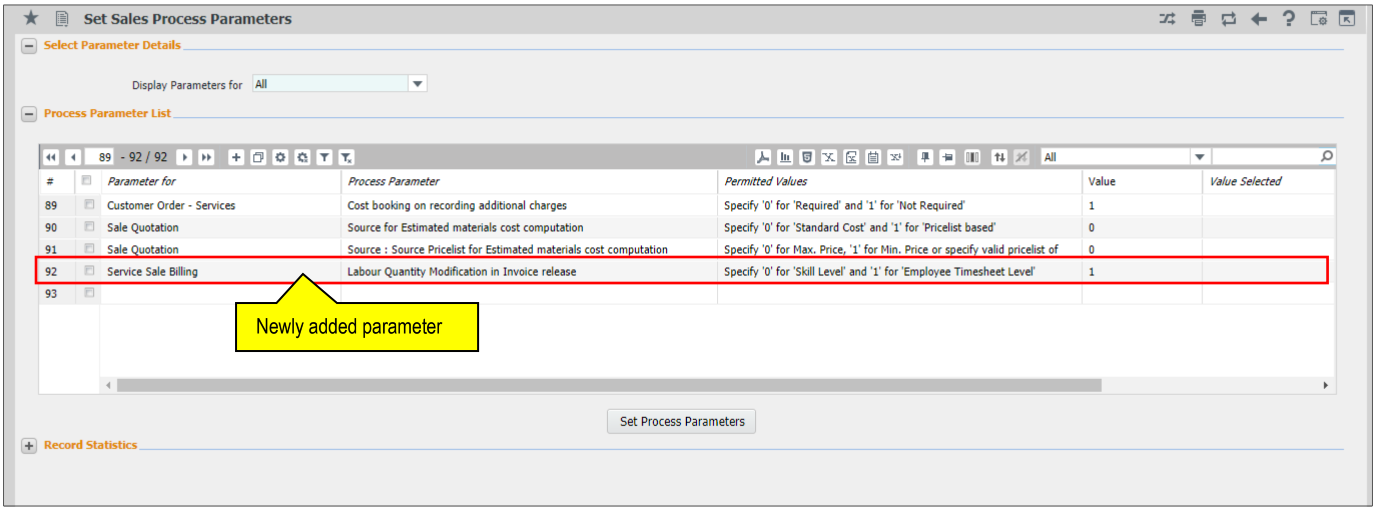
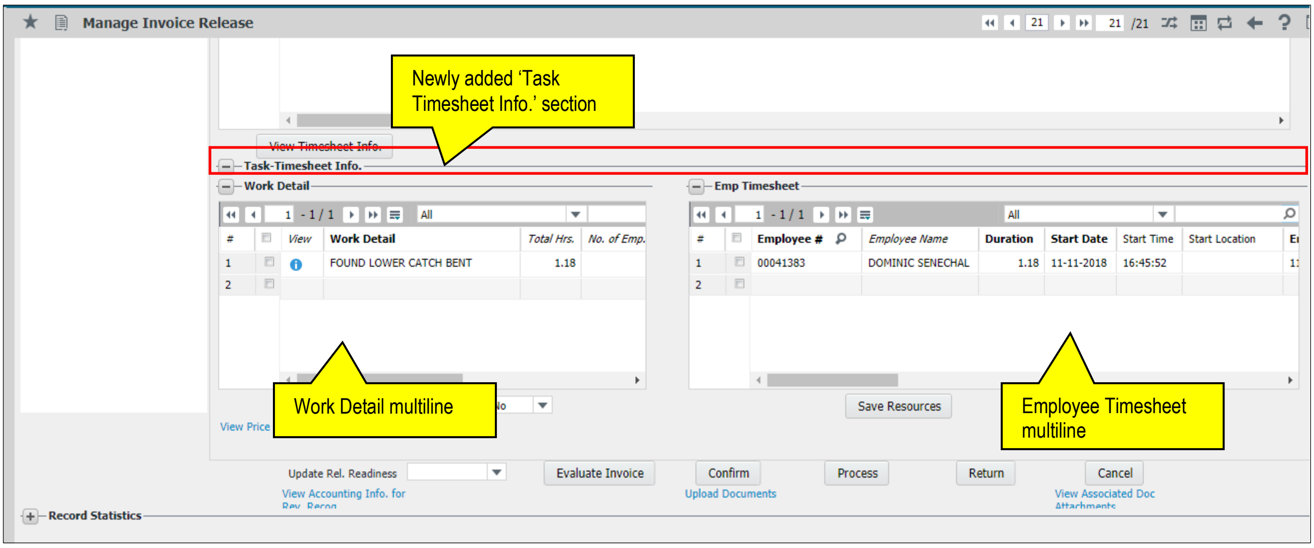


Exhibit 2:

View Timesheet Info. section in the **Resouces** tab in the **Manage Invoice Release** activity of the **Service Sale Billing** business component


Manage Invoice Release
Newly added 'Task Timesheet Info.' section
Task-Timesheet Info.
Work Detail
Emp Timesheet
Work Detail multiline
Employee Timesheet multiline
Save Resources
Evaluate Invoice
Confirm
Process
Return
Cancel
Record Statistics

Ability to auto charge customers for freight and other charges recorded in Supplier Order Based Invoice

Reference: AHBG-28634

Background

When parts are serviced through external vendors, the vendor produces an invoice containing the payable amount. Initially the MRO quotes the customer a value, however the actual value once received from the vendor would be charged to the customer, for example charges such as Fright Charge, such charges are high in cases of AOG situations. Therefore the requirement is or a provision to automatically bill fright and other charges from the vendor to the Customer.

Change Details

(i) Charges and Discounts recorded against a Supplier order based invoice for a Service Purchase order or Repair Order will be automatically retrieved to Invoice Release of the corresponding Customer Order.
(ii) The Charges and Discounts must be added as Expense off type
(iii) The Charges and Discounts will be retrieved as a separate line within the Ext. services tab against the Invoice #.

Supplier Order Based Invoice > Maintain Invoice
Charges and Discounts for external services provided in the Invoice either Part/Order/Invoice level, against a Service Purchase Order or a Repair Order corresponding to a Customer Order # is eligible to be charged to the Customer and therefore will be sent for Customer billing.

Service Sale Billing > Process Invoice > Manage Invoice Release

- Details of any Charges and Discounts for External Repair Services will be retrieved in the multiline of the 'External Services' tab as given below:

  - Exec. Doc. Type – The execution document type whether Purchase Order or Repair Order
  - Exec. Doc. # - The document number of the Purchase Order / Repair Order.
  - Doc. Type - 'Supplier Order Based Invoice'
  - Doc. # - The number identifying the Order Based Invoice
  - Doc. Line # - This column is not applicable for Charges/Discounts
  - Doc. Status - The status of the Purchase Order / Repair Order.
  - Part # - Indicates the TCD Code / Variant Code
  - Part Desc. – A brief description of the TCD / Variant
  - Qty - This column always displays '1'
  - Basic Rate (CO Curr.) = The TCD amount in CO Currency as per latest Exchange Rate

- Details of any additional charges to be added to the PO/RO order value along with the variance will be the 'Reg. Billing Info' tab.

Sale Quotation > Manage Sale Quote

- Details of any Charges and Discounts for External Repair Services will be retrieved in the multiline of the 'External Services' tab as given below:

    - Exec. Doc. Type – The execution document type whether Purchase Order or Repair Order
    - Exec. Doc. # - The document number of the Purchased Order / Repair Order.
    - Doc. Type - 'Supplier Order Based Invoice'
    - Doc. # - The number identifying the Order Based Invoice
    - Doc. Line # - This column is not applicable for Charges/Discounts
    - Doc. Status - The status of the Purchase Order / Repair Order.
    - Part # - Indicates the TCD Code / Variant Code
    - Part Desc. – A brief description of the TCD / Variant
    - Qty - This column always displays '1'
    - Basic Rate (CO Curr.) = The TCD amount in CO Currency as per latest Exchange Rate

- Details of any additional charges to be added to the PO/RO order value along with the variance will be the 'Ref. Info' tab.

    Note: The system applies Mark-up set for External Services in Service Pricelist to the Charges and Discounts only if the 'Pricing Basis' is set as 'Invoice Value' and 'Applied On' factor is set as 'Total Value'.

Provision to set differential resource rates at resource entity level and price against CO

Reference: AHBG-28515

Background

When it comes to pricing, differential rates can be defined for each category such as skill, equipment or facility in which the rates may vary with respect to certain slabs of usage. The differential rates available in **Service Pricelist** is meant for this purpose but the rate application is done by summing up usage or hours of all employee / facility code falling under the same Resource Type / Resource #.

The requirement therefore is to enable application of this rate for each Employee # or Facility Code rather than on consolidated hours with respect to source code.

Change Details

Changes have been made so that the differential rate for each employee number or Facility Code and not on consolidated hours with respect to Resource Code

<u>Set Option</u>

- A new parameter for the entity type 'Service Sale Type' has been introduced in the **Set Process Parameters** link in the **Define Process Entities** activity of the **Maintenance Setup** business component as given below:

Process Parameter: Level at which Resource pricing should be done
Permitted Values :

- '0' for 'Resource level
- 1' for 'Indv. Resource level'

<u>**Resource** tab in the **Manage Sale Quotation** activity under the **Sale Quotation** business component</u>

- <u>Auto Quote Generation</u>
  If the parameter 'Level at which Resource pricing should be done' is set as '1' for 'Indv. Resource level', Then on generation of quote based on estimates, the resource quantity is consolidated against each unique Resource Entity i.e., Facility Object Code # or Employee #.

- <u>Manual Quote Generation</u>
  If the parameter 'Level at which Resource pricing should be done' is set as '1' for 'Indv. Resource level then on 'manual quote generation the resource quantity is consolidated at Facility object code level.

  Note: When new Tasks with Resources or new Resources are added to the quote the Resources retrieved are yet again consolidated at Facility Object Code # level for pricing if the above mentioned parameter is set as Indv. Resource level

Manage Invoice Release activity in the Process Invoice business component

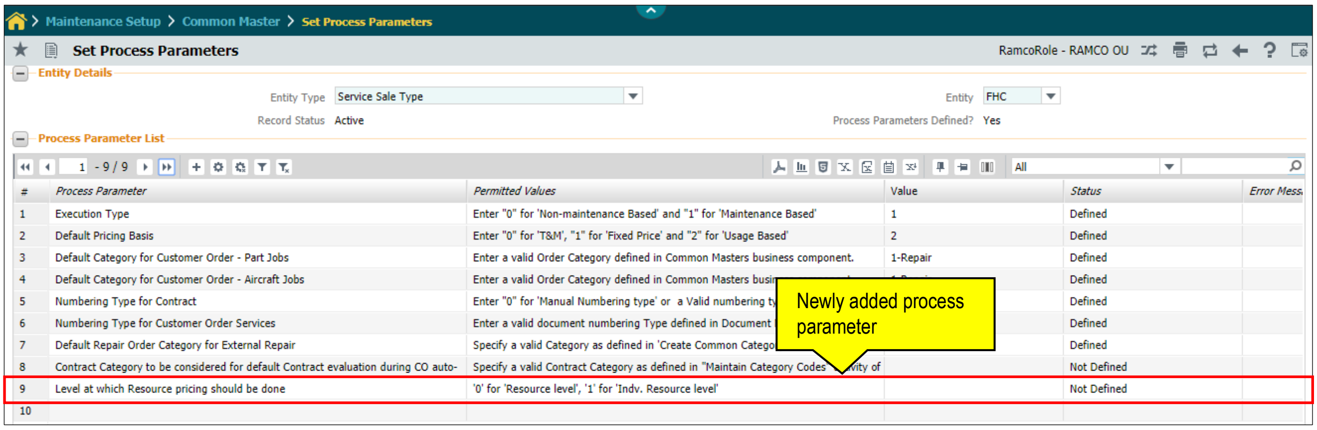
- On release generation, the system consolidates the actual resource consumption quantity at unique employee / facility object code # level for pricing.

Note On Release generation, if the parameter "Level at which Resource pricing should be done' is set as '1' for 'Indv. Resource level', and if there is a capping set for resources, such caps are applied as per current functionality against each Task at per task per Resource type / resource # level.

Note that on any addition of new resource through Timesheet, the system consolidates the same to the existing resource details with grouping to unique Employee #.

Exhibit 1:

Set Sales Process Parameter link in the Define Process Entitites activity of the **Common Masters** business component



Ability to add charges with a Task Reference in Sale Quote and Inv. Release

Reference: AHBG-28997

Background

While performing a customer job, there could be multiple additional charges incurred, such as, Travel - Mileage charges, Freight charges, Courier charges, etc. While these charges can be added to quotation and billing, the task or job against which the charge was incurred is not captured.

Therefore the requirement is for a provision to be able to set a task reference to charges that are added in Quote and Invoice Release.

Change Details

A new column 'Ref. Task' has been added in the 'CO T/C/D' tab in the following activities:

- **Manage Sale Quotation** activity of the **Service Sale Quote** business component as a provision to select specific task reference against the T/C/D Charges under CO T/C/D tab
- **Manage Invoice Release** activity of the **Service Sale Billing** business component as a provision to select specific task reference against the T/C/D Charges under CO T/C/D tab.
- **Manage Invoice** activity of **Customer Invoice** business component has been provided with visibility on Reference Task against which T/C/D has been added.

Note: The task is only a reference against which the charges can be viewed or printed, with no costing impact.

Also, the taxable amount will still be considered from the document on the whole and not from selected Task.

Exhibit 1:

CO TCD tab in the **Manage Sale Quotation** activity of the **Service Sale Quote** business component

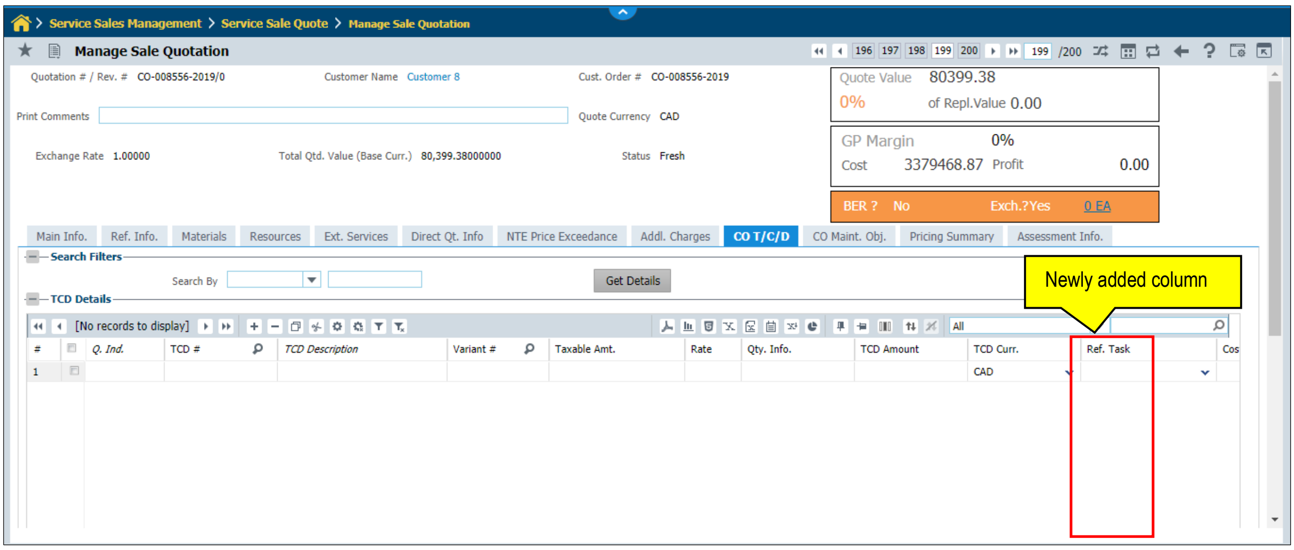


Exhibit 2:

CO TCD tab in the **Manage Invoice Release** activity of the **Service Sale Billing** business component

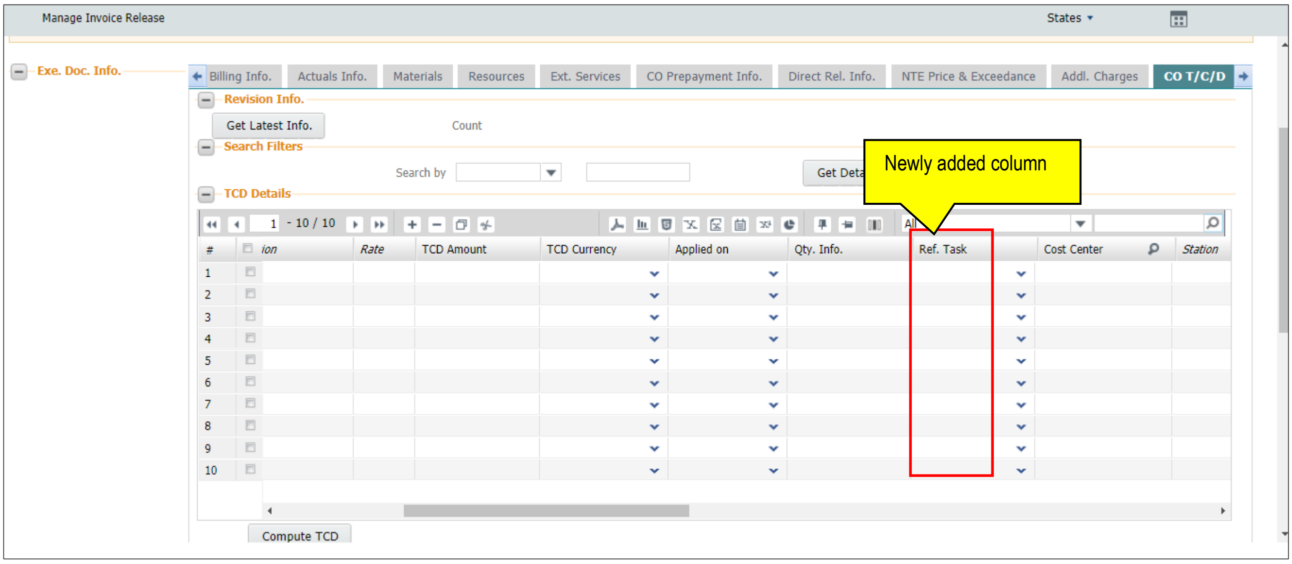
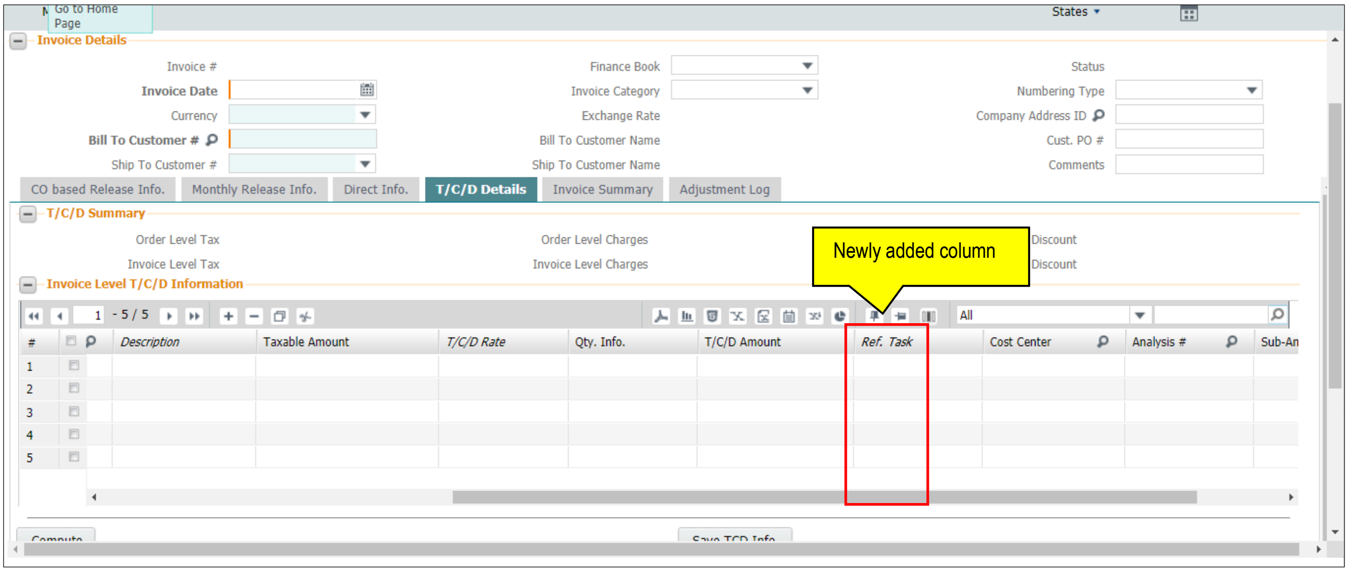


Exhibit 3:

CO TCD tab in the **Manage Invoice** activity of the **Customer Invoice** business component



Ability to add parts and resource while processing Invoice release

Reference: AHBG-27523, 28548

Background

On generation of Invoice Release, the commercials personnel reviews the material and resource consumption for the work performed either on completion or when the work is in progress. Based on this pricing modifications will be done. However, in some cases, the consumed materials or resources might not be reported during work execution. Therefore the requirement is for a provision to add material and resource information manually against the task and provide the price details against the same.

Change Details

1. Two new popup screens linked to Invoice Releases have been introduced to facilitate addition of materials and resources in the **Manage Invoice Release** activity of the **Process Invoice** business component as given below:

   - A new link 'Add Part' has been added in the **Materials** tab of the **Manage Invoice Release** activity which launches a popup in which the required materials can be added.
   - A new link 'Add Resources' have been added in the **Resources** tab of the **Manage Invoice Release** activity which launches a popup in which the required resources can be added.

2. Provision has been made to provide price also during the addition of materials and resources details in the respective popups.

   Note the following:

   1. *The system always considers the newly added materials / resources as out of scope and priced, irrespective of the pricing basis of the task against which it has been added.*
   2. *If the user does not explicitly provide the price, pricing would be computed for the materials / resources added through the popups, if the price is not provided by the user explicitly.*
   3. *On addition of new parts and resources, capping would not be re-computed and billability and Warranty parameters would be inherited from respective tasks which are referred during material / resource addition.*

3. Indicators have been added under the Materials and Resources tabs to indicate / differentiate the newly added entities.

   Note: (i) Select Exec. Document and Task # in the header of Add Parts/Add Resources pop-up to set the context for document and Task against which Parts/Resources are to be added. Exec. Document and Task need not be selected in Multiline against if already selected in header.

   (ii) Use Exec. Document and Task in multiline to add Parts and Resources against multiple Tasks at a time.

Exhibit 1:

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

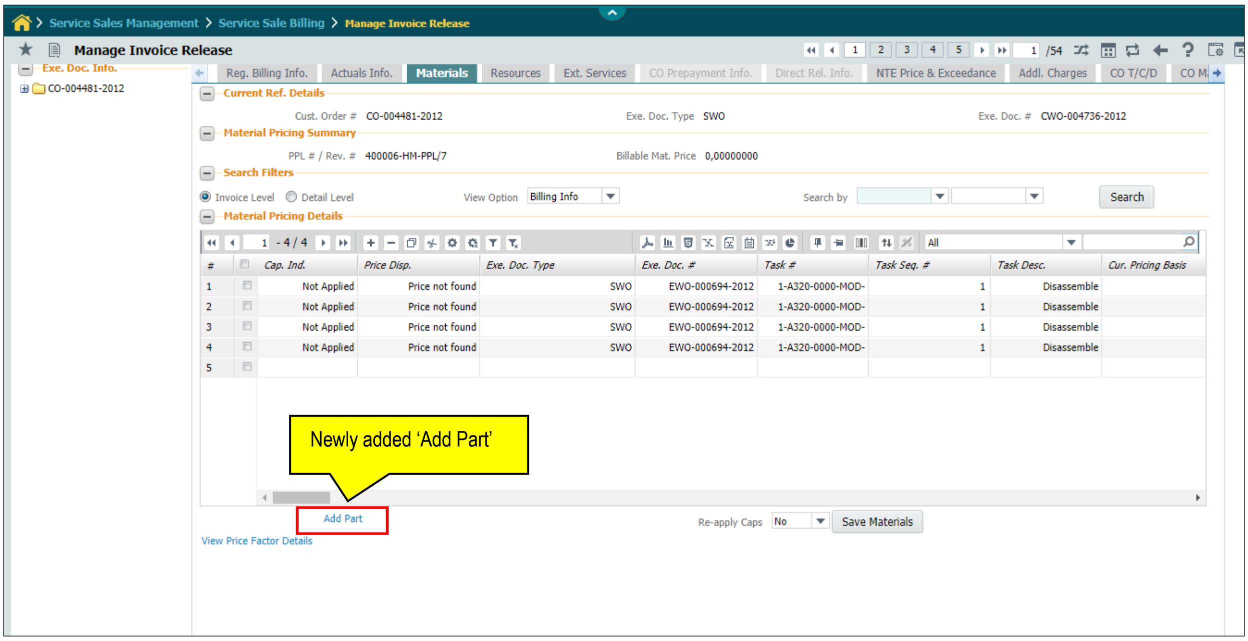


Exhibit 2:

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

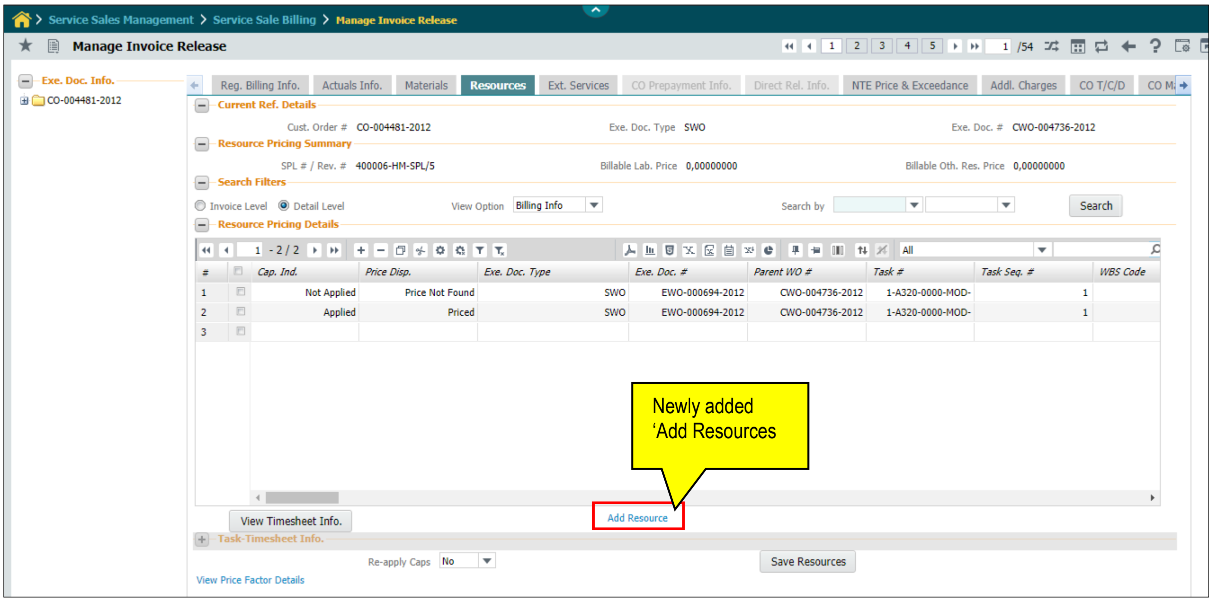


Exhibit 3:

Add Parts popup link in the **Materials** tab of the **Manage Invoice Release** business activity

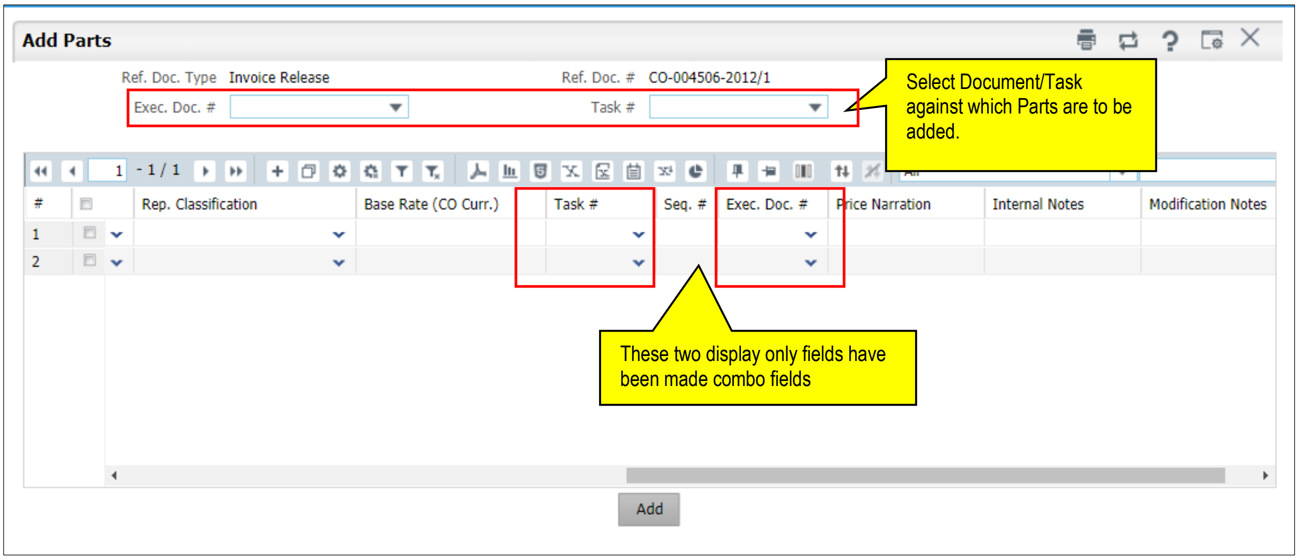
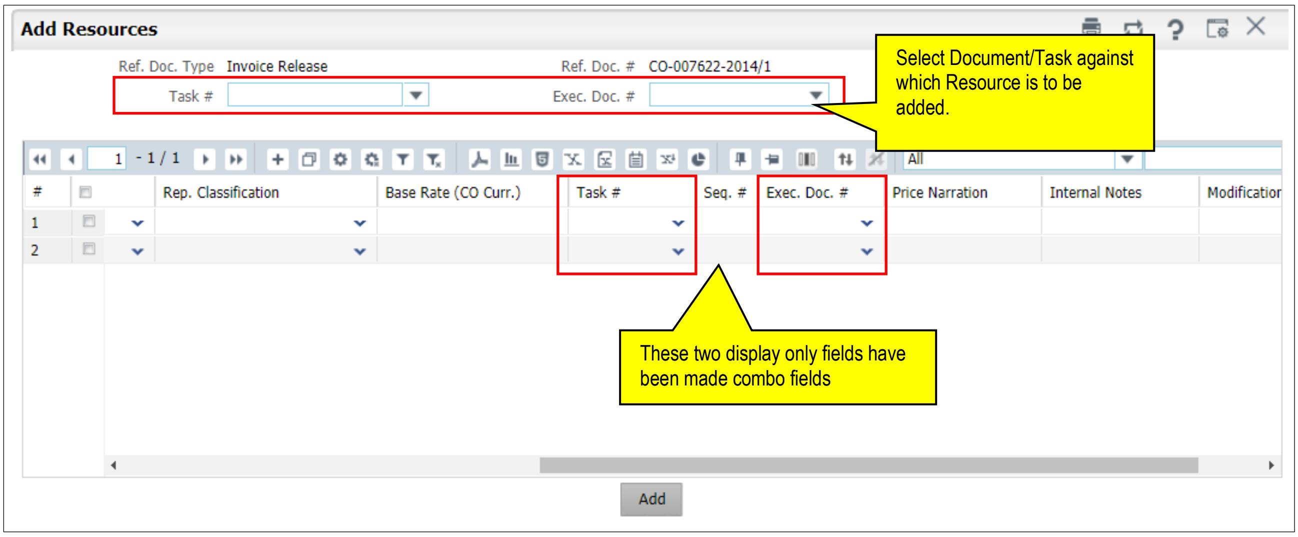


Exhibit 4:

Add Resources popup link in the **Resources** tab of the **Manage Invoice Release** business activity



Ability to configure Multilevel Approvals and Work Flow Notifications in Invoice release

Reference: AHBG-25269

Background

When it comes to billing for maintenance tasks performed, pricing and consumption information of each entity, that is, Material, Resources are reviewed by different billing personals and modification are done as per requirement. After modifications, the bill is reviewed by the lead role of Commercials / Billing Executives who has the authorization to process the bill and provide confirmation to Account Receivable to dispatch the invoice to the customer. In case of any modifications to the bill, then the bill is returned by the Lead to Commercial / Billing Executives.
Provision is required to automatically trigger notification when the bill is ready for review and the generated bill is required to be automatically routed to the respective lead who has the authorization to review. Also provision is required to receive notification on key events such as during Generation of Bill, Processing the bill / Returning the bill.

Change Details

1. Workflow authorization has been enabled for actions such as, Process and Return which brings in the capability of routing the document to the respective / required user based on the next action required on the bill.
2. A new 'Return' button has been introduced in the **Manage Invoice Release** screen to facilitate the reviewer to return the bill in case of requirement of any modification.

> *Note: In absence of Workflow setup, the Return button will simply aid in Returning a confirmed document for any further modifications and put the release in Returned status. (This is similar to Return action in Quote)*

3. Workflow notification has been enabled for key events such as Bill Generation, Confirmation, Processing, Return, Cancellation and Bill re-processing

Exhibit 1:

Manage Invoice Release activity in the **Service Sale Billing** business component

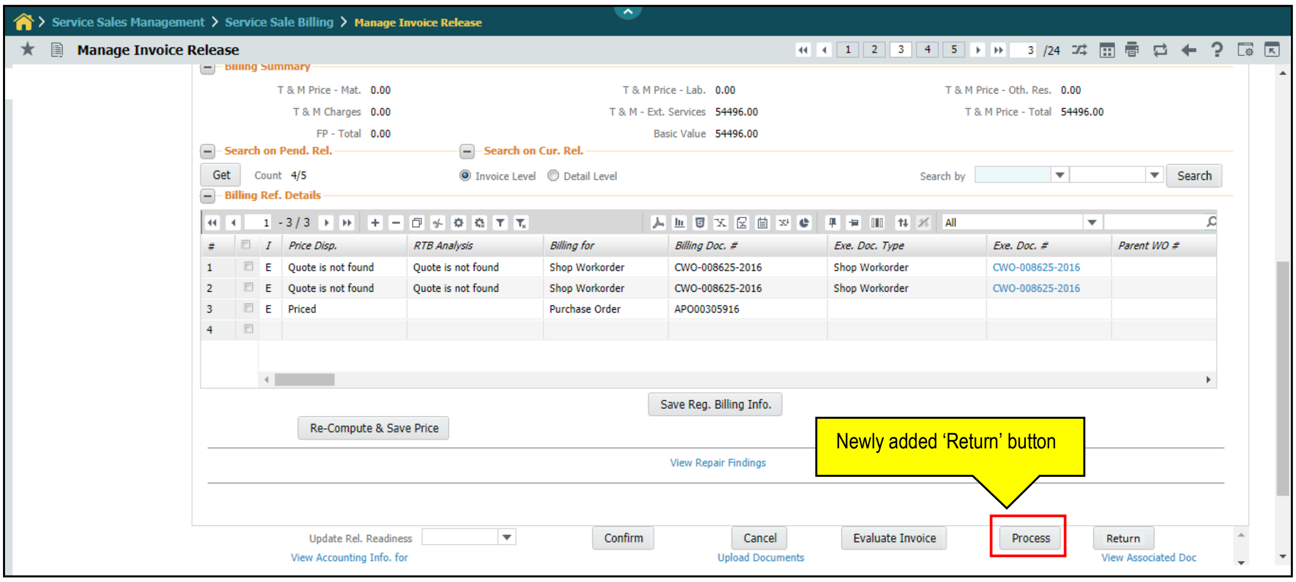
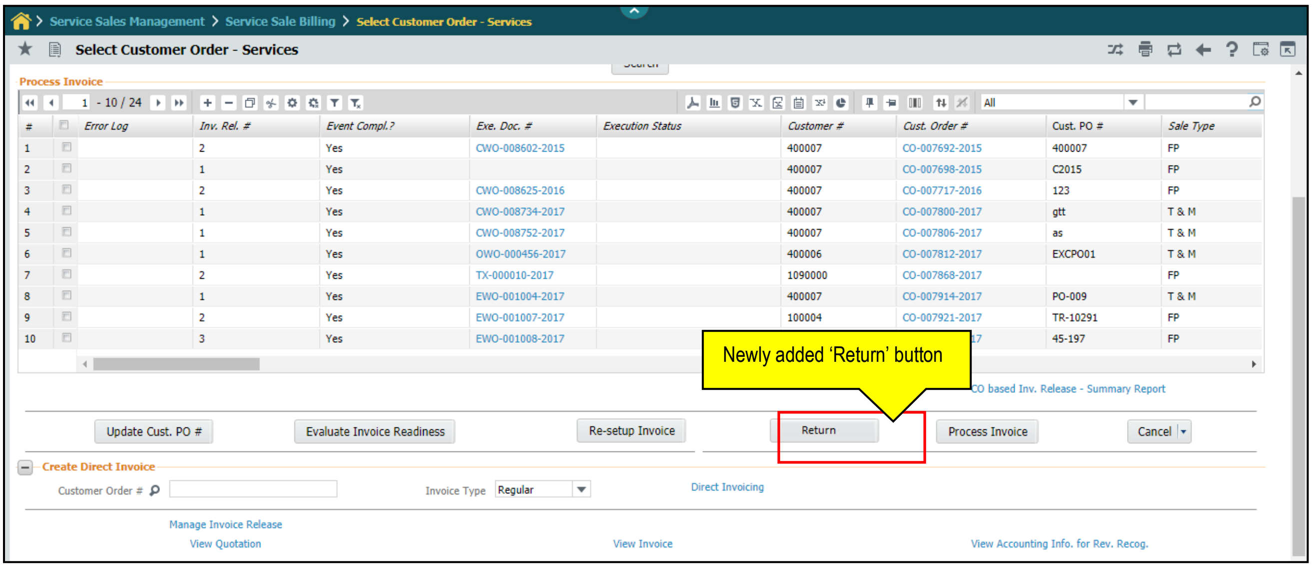


Exhibit 2:

Select Customer Order – Services activity in the **Service Sale Billing** business component



Ability to extract Timesheet details report based in a summary format

Reference: AHBG-28940

Background

Timesheet details reported by each employee in various work orders for a given period of time can be viewed in the Timesheet Details Report. It is common to charge back to the customer some of the expenses made on the employees like for example Meals to the customer in road maintenance jobs. For billing purposes and to check if the employee is applicable for such meal charges, a complete view on the day's job with respect to time booking is required. Therefore the requirement is for a timesheet summary report which will provide all the important and mandatory information.

Change Details

The 'Employee Name' field has been added in the search inputs prior to launching the report.

A new search parameter 'Report Option' has been added to enable report with two options - Summary report and Detailed report.

If the report option is set as Summary, the system will retrieve only the below-mentioned columns:

Summary Report

Employee #

Name

Start Date/Time

End date/Time

Act. Hours logged

Emp. Comments

Task/Dp #

Task/Dp Desc.

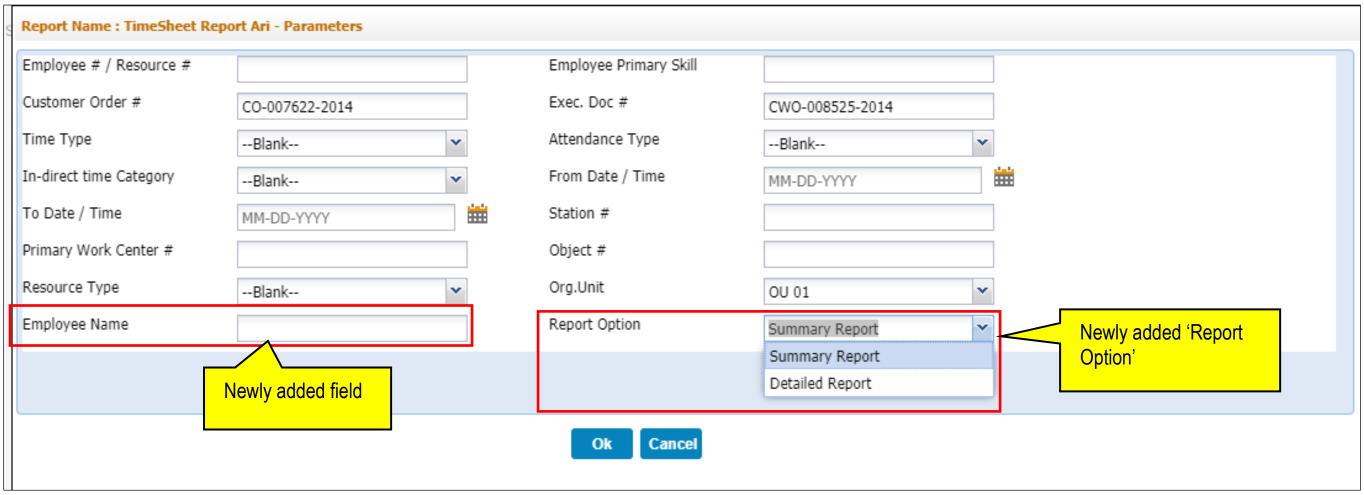
Object #.

Station

Note: The system will retrieve all the fields as currently available in the report if "Detailed Report" is specified as the "Report Option"

Exhibit1:

Report Name: Timesheet Report ARI - Parameters


Report Name : TimeSheet Report Ari - Parameters
Employee # / Resource #
Employee Primary Skill
Customer Order #
CO-007622-2014
Exec. Doc #
CWO-008525-2014
Time Type
--Blank--
Attendance Type
--Blank--
In-direct time Category
--Blank--
From Date / Time
MM-DD-YYYY
To Date / Time
MM-DD-YYYY
Station #
Primary Work Center #
Object #
Resource Type
--Blank--
Org.Unit
OU 01
Employee Name
Report Option
Summary Report
Summary Report
Detailed Report
Newly added field
Newly added 'Report Option'
Ok
Cancel

Ability to inquire for part availability and price references for a service job

Reference: AHBG-28160

Background

While performing a quote, the parts or resources which were estimated are generally priced based on the standard pricing definition given in the Part Pricelist and Service pricelist. There are cases when the parts might not be available in stock and MRO wishes to procure them for the job and obtain a quote from the vendor. In such cases, it is important that the commercial manager has the visibility of the rate of the part from the Pricelist as well as from the latest Vendor quote. Therefore, the requirement is for a provision to have a visibility on the Part availability in the stock and also to be able to view and compare the rates from the pricelist and latest vendor quotes.

Change Details

A New link **Inquire Part Availability & Pricing** has been introduced in the **Manage Sale Quotation** screen under the **Materials** tab.

The link launches the **Part Availability and Commercial References** screen with provision to view all vendor quoted price, when a part is consumed during the Sale Quotation.

A new option 'Repair Jobs' has been added in the 'Inquiry For' drop-down list box in the header section.

1. Stock Summary section will show the availability of the selected part within the inventory.
2. Quote from Supplier section will show all prior quotes obtained from multiple vendors for the part selected.
3. Purchase details section will show the details of the recent procurements done for the part from multiple vendors along with the purchase price.
4. Part Pricelist section will show the rate of the part from available Part Pricelists in the system.
5. The Quote to Customer section, will show the previous sale quotations provided to Customers which figured the same part earlier.

Exhibit 1:

Materials tab in the **Manage Sale Quotation** activity of the **Service Sale Quote** business component

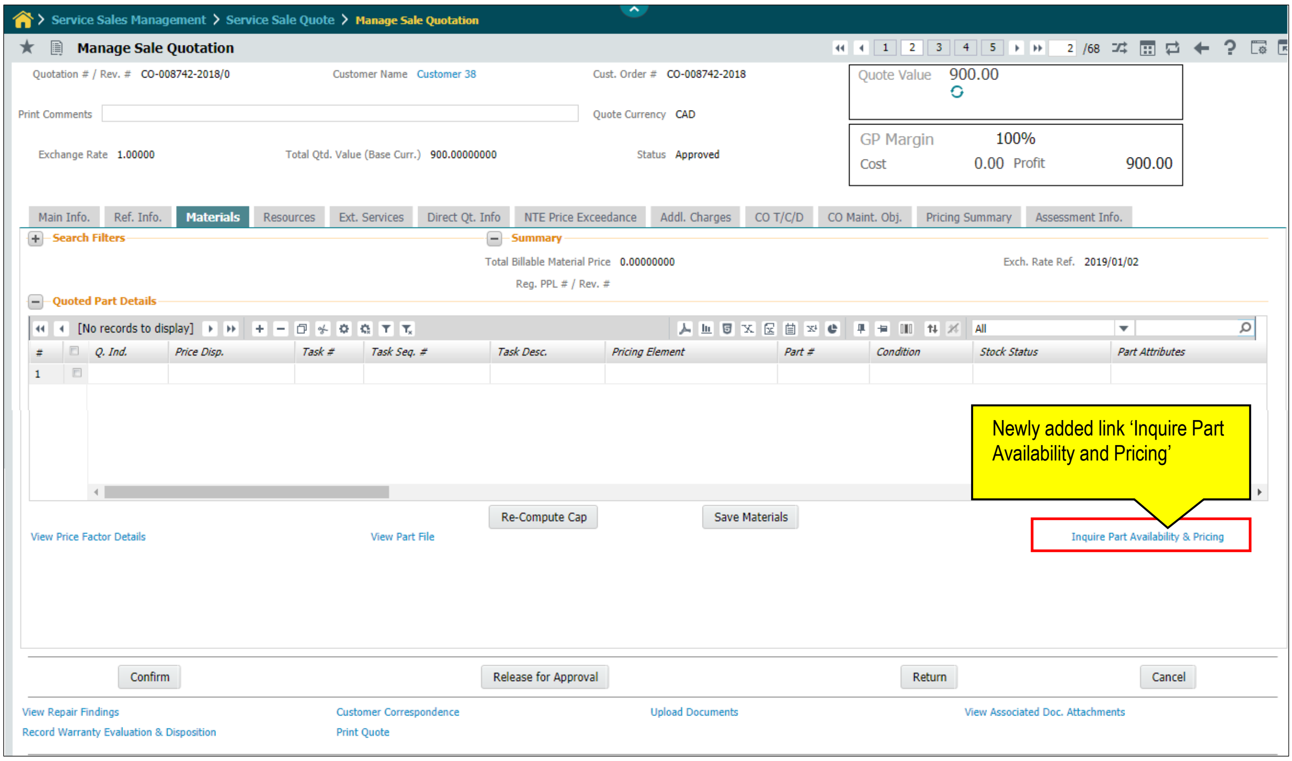
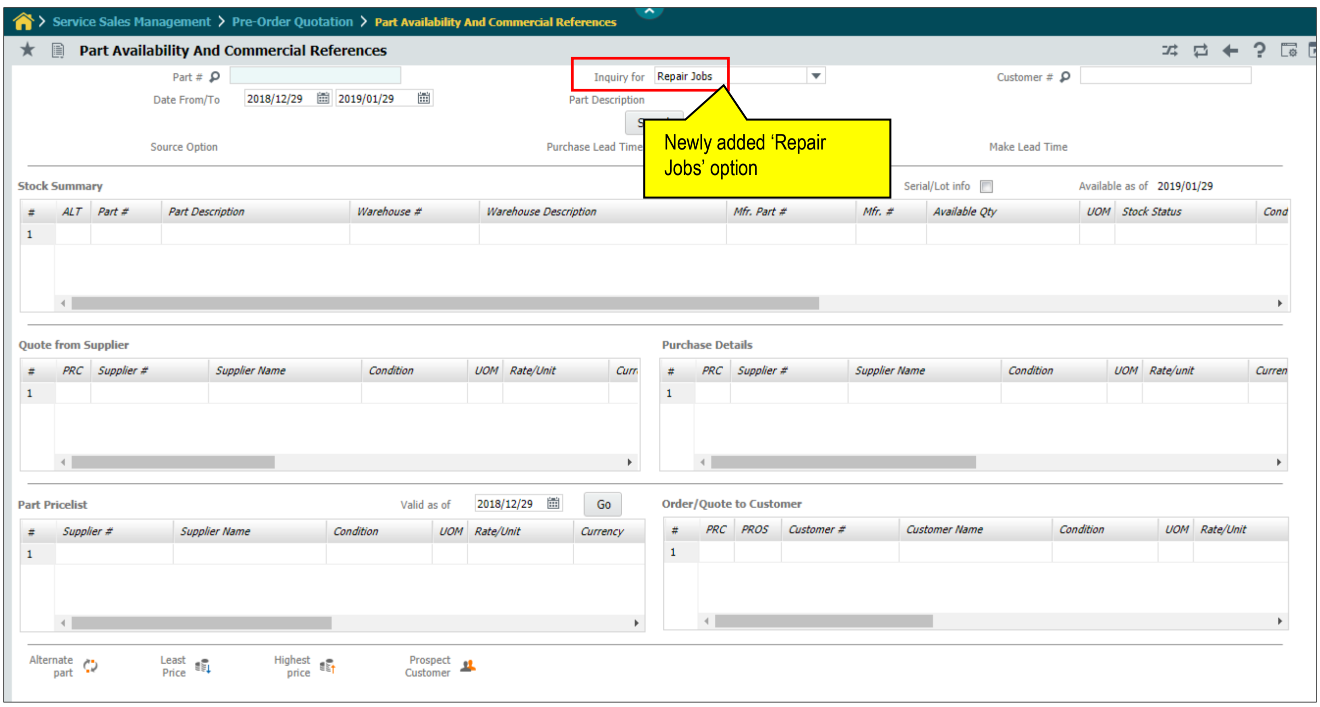


Exhibit 2:

Part Availability and Commercial References link page in the **Material** tab under the **Manage Sale Quotation** activity of the **Sale Quotation** business component



WHAT'S NEW IN CUSTOMER ORDER SERVICES AND CUSTOMER INVOICE?

Ability to view documents attached to related documents against a Customer Order

Reference: AHBG-27038

Background

During On-road maintenance services, the Technicians or Mechanics would incur certain expenses which will have to be charged back to the customer. The best and practical way to keep the Finance team informed about such expenses is by attaching a copy of the receipt to the corresponding execution document. But, any document attached against an Execution document, currently does not appear for viewing against the Customer Order or during billing.
Hence, the requirement is for a provision to view all the documents attached against any related execution document in the Invoice Release screen with customer order as the reference.

Note: AME, SWO, PO, RO and Exchange Order are the documents which has Customer Order as reference.

Change Details

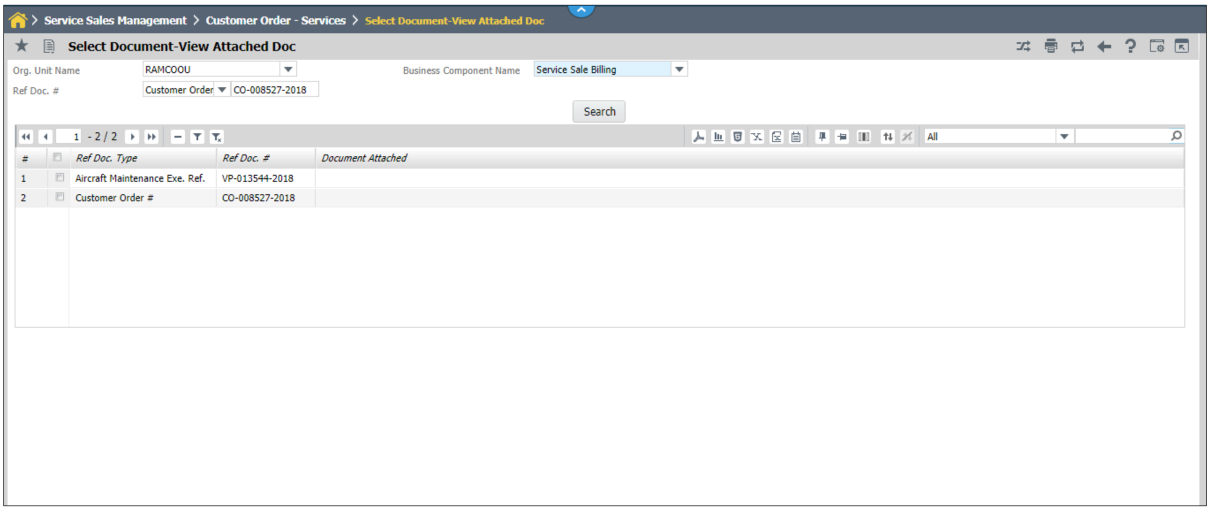
A new wrap up screen **Select Document - View Attached doc** has been introduced in the **Customer Order – Services** and **Service Sales Management** business components.
This screen shows the CO reference documents, AME, SWO, PO, RO and Exchange Order along with the availability of any document attached against them. If documents are available, the same would be indicated as a hyperlink.

*Note: On the click of 'View Documents' link against the components, the existing screen **View Associated doc. Attached** screen is displayed with the documents attached against the selected Execution document.*

Note that since there is no provision to upload documents against Exchange Orders, those documents will not be available against the Customer Order.

Exhibit 1:

Select Document - View Attached Doc activity in the **Customer Order – Services** business component



Ability to add Unit Rate Based TCD

Reference: AHBG-25507

Background

Based on the quantity of materials used, labour hours worked etc., some customers have Taxes, Charges and Discounts, therefore they have to add rate based TCDs in the quotation or invoices specifying the quantity information on which the TCD rates have to be applied.

Currently, the MRO's operate in such a way that the TCD's get added in the invoice release which is modified in the final Customer Service Invoice or even added in the final customer service invoice.

Change Details

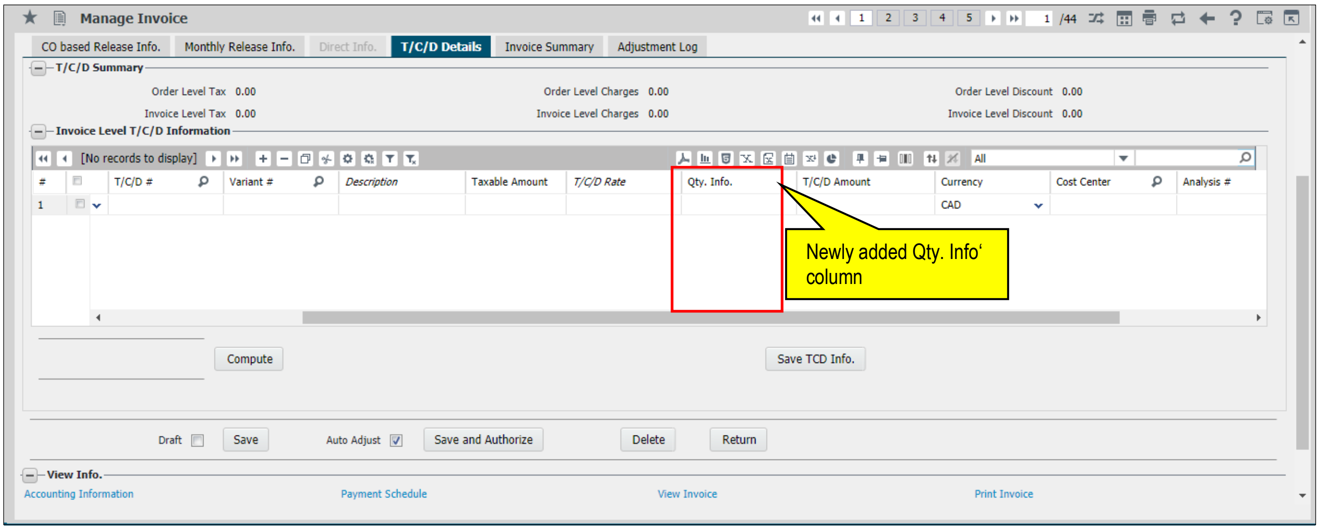
A new column 'Qty. Info.' has been added in the following activities:

TCD Details tab of the **Manage Invoice** activity in the **Customer Service Invoice** business component under the **Receivables Management** business process.

'Qty. info' added so that the Qty details provided in the Invoice Release for rate based TCD will be carried forward to the final invoice. Also the user has the provision to add new TCD's or make changes to the existing ones.

Exhibit 1:

TCD Details tab of the **Manage Invoice** activity in the **Customer Service Invoice** business component



Ability to define default GST for Customers based on From and To Tax Regions and ability to default GST in Customer Service and Prepayment Invoices

Reference: AHBG-13877

Background

This enhancement pertains to providing the ability to define default Tax for customers based on the 'From Tax Region' and 'To Tax Region' for various Part / Service Groups
Also provision is required to derive and apply GST taxation for Customer Service and Prepayment Invoice based on the 'From Tax Region' and 'To Tax Region'.

Change Details

New fields have been introduced in Sales Tax Rules multiline of the **Manage Sales Tax Rules** activity under the **Customer** business component to define default taxes against each Customer Group

Provision has been given to derive the 'From Region' from the Primary Work Center of service and 'To Tax Region' will be derived using the Bill to Customer Address. The same will be used to derive and automatically apply GST as defined in **Sales Tax rules**

Manage Sales Tax Rules activity under the **Customer** business component

1. The field 'Source of Revenue' has been renamed as 'Document Type' which will list the following values
   - Part Sale Invoice
   - Customer Service Invoice
   - Customer Prepayment Invoice
   - Stock Transfer Issue
2. The 'From and To Tax Regions' combos will list Quick Codes under the component Finance Setup only if the Country Code of the Login OU is set as 'India', else combo must not be loaded with any value.
3. 'Invoice Category' combo in the Search section will not list any values.
4. Part / Service Group in Search section will list down all the 'active' Part Groups with purpose as 'Taxes and Charges' in the **Create/Edit Part Groups** activity under the **Part Administration** business component.
5. The 'From Tax Region' and 'To Tax Region' combos will list all 'active' values define against the Entity: Tax Region from the Quick Codes under the Finance Setup business component.
6. The system defaults the 'Valid From' and 'Valid To' date fields with the current date.
7. The system retrieves and displays all applicable records for the Document Type defaulted with the applicable validity date
8. The Invoice category combo in the multiline should be loaded with all active categories defined for the category type 'Invoice Category' in the Category master

On screen launch, Part/Service Group in Search section must be loaded with all 'Active' Part Groups with purpose as 'Taxes and Charges' in the Activity 'Create/Edit Part Groups' under the component Part Administration. Default this field with 'blank'.

On screen launch, the From Tax Region and To Tax Region combos must be loaded with all Active values define against the Entity: Tax Region from the Quick codes under the component Finance Setup. Default this field with 'blank'.

Manage Customer Invoice

When an Invoice is generated manually through the **Generate Customer Service Invoice** screen under the Customer Service **Invoice** activity, on click of 'Generate Invoice' button or when an Invoice is created automatically, the system derives the default Tax applicable for the customer for the rendered service from the Sales Tax Rules and applies as follows:

1. Compares the Invoice Category of the Invoice with the Invoice Category available in the Sales Tax Rules
2. Considers From Tax Region as the Tax region mapped to the station of the primary work center of the Customer Order
3. Considers the Tax Region of the Bill to Customer Address in the Invoice as the 'To Tax Region'.

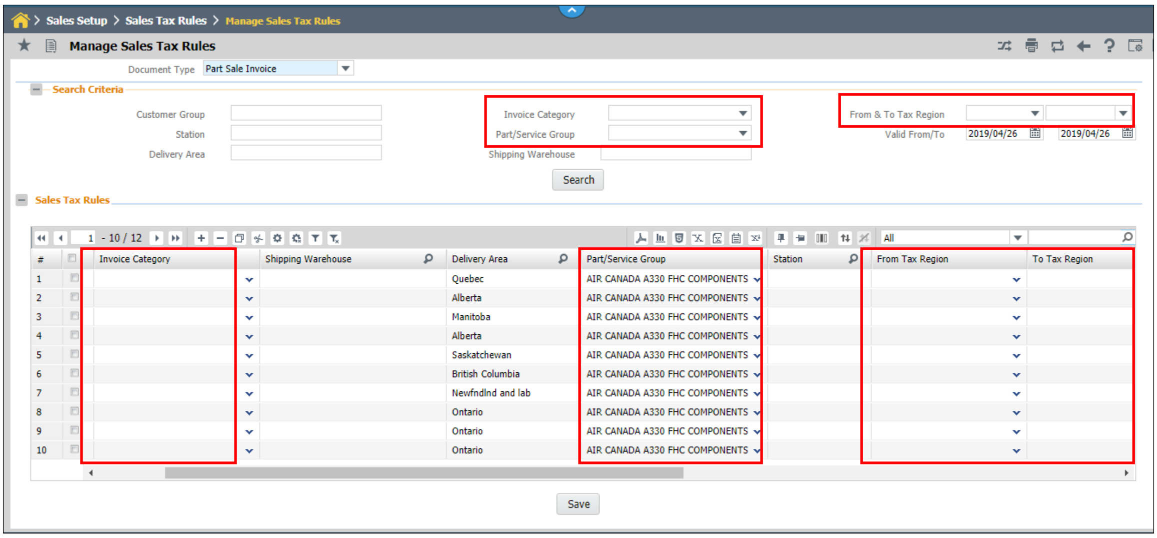
Customer Prepayment Invoice

For a Direct Prepayment Invoice, on click of Save, the system considers the following criteria to retrieve the Tax:

1. Considers the default Tax region mapped to the Company Address ID of the selected Finance Book as the 'From Tax Region'
2. Considers the Tax region mapped to the Bill to Customer Address as the 'To Tax Region'
   Considers the 'Invoice Category' selected.
3. The Tax must be defaulted for the above combination of Invoice Category, From Tax Region and To Tax Region

Exhibit 1:

Manage Sales Tax Rules tab in the **Sales Tax Rules** activity in **Sales Setup** business process



Ability to auto attach invoice reports to email to be able to forward to customers

Reference: AHBG-28624

Background

Currently Invoice Reports against a Customer Invoice are extracted in the required format after authorization and manually shared to the Customer either as a hard copy in hand or sent over mail.
The requirement is for a provision to automatically send e-mail upon authorization to a designated user along with details and the Invoice report attached to the mail.

Change Details

- A new section 'E-Mail Information' has been added in the **Edit Commercial Information** link page in the **Create / Edit Customer Record** activity under the **Customer** business component. This section displays the following fields:

    - Automatically send Inv. Info on Authorization combo with the values 'Yes' and 'No'
    - Email ID 1 editable field
    - Email ID 2 editable field

The email id mentioned against the Bill to Address IDs will also be considered for sending the mail.

*Note: Default email addresses will be captured in **Customer** master to identify the addresses to which the Invoice copy must be sent automatically.*

- On clicking Authorize in the Authorize Invoice activity of the Customer Invoice business component, automatic email will be send only if the following conditions are true:

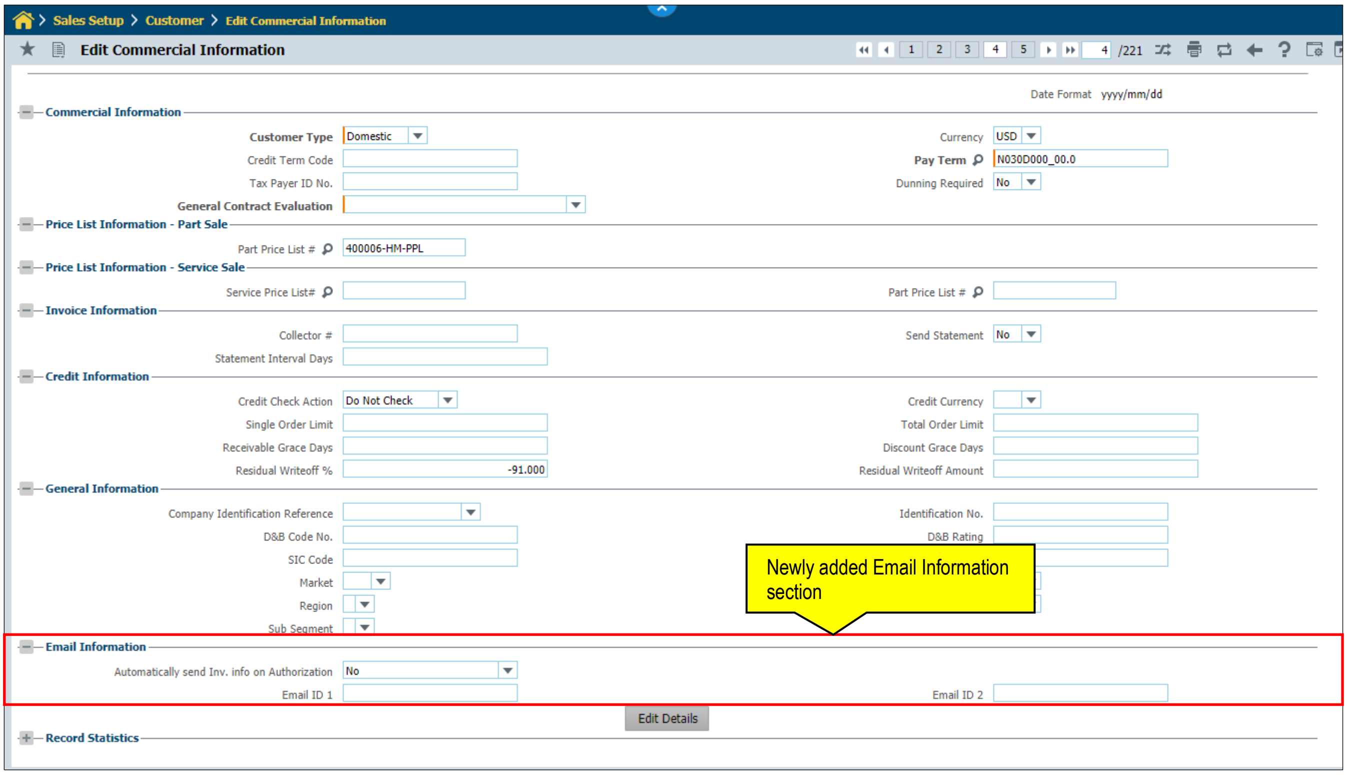
    - If the parameter 'Automatically send Inv. Info on Authorization' in the Customer business component is set as 'Yes'.
    - Mail ID has been provided against the Bill To Customer Address ID

Note: The invoice report format will be set as part of the implementation process as no provision is given to choose the required Invoice Report format from screen.

*The subject line format for the auto generated mail is **Invoice for Order (Customer Order #)***

Exhibit 1:

Edit Commercial Information link in the **Create / Edit Customer Records** activity under the **Customer** business component


Sales Setup > Customer > Edit Commercial Information
Edit Commercial Information
Date Format yyyy/mm/dd
Commercial Information
Customer Type
Domestic
Credit Term Code
Tax Payer ID No.
General Contract Evaluation
Currency
USD
Pay Term
N030D000_00.0
Dunning Required
No
Price List Information - Part Sale
Part Price List #
400006-HM-PPL
Price List Information - Service Sale
Service Price List#
Part Price List #
Invoice Information
Collector #
Statement Interval Days
Send Statement
No
Credit Information
Credit Check Action
Do Not Check
Single Order Limit
Receivable Grace Days
Residual Writeoff %
-91.000
Credit Currency
Total Order Limit
Discount Grace Days
Residual Writeoff Amount
General Information
Company Identification Reference
D&B Code No.
SIC Code
Market
Region
Sub Segment
Identification No.
D&B Rating
Newly added Email Information section
Email Information
Automatically send Inv. info on Authorization
No
Email ID 1
Email ID 2
Edit Details
Record Statistics

WHAT'S NEW IN CUSTOMER INQUIRY?

Modification of Due date after authorization of Invoice

Reference: AHBG-24723

Background

Currently, due date for the Customer Invoices is not allowed to be modified after authorization. However, based on negotiation or instructions from the Customer, due date might undergo changes and maintained outside the system. This enhancement is to allow the modification of due date for the Customer Documents after authorization.

Change Details

- A new parameter has been added in the **Set Finance Process Parameters** in the **OU Parameter Setup** business component as below:

  Business Process: Receivables Management

  Category: Modification of Due Date

Process Parameter	Category	Value
Modification of Due Date after authorization of Invoice	Modification of Due Date	Enter: • '0' for 'No' • '1' for 'Yes'

- A new column has been added which displays an edit icon in the multiline of 'Acc. Balance Due' tab in the **View Customer Balance Information** activity under the **Customer Inquiry** business component. The user can select the respective edit icon in the multline to launch the Payment Schedule screen to modify due date / discount date of Supplier Invoices or Notes.

*Note: The system does not display the **Save** and **Authorize** pushbutton when the **Payment Schedule** screen is launched from the Customer Inquiry business component.*

Note: Modification of Due Date / Discount date is also applicable for documents with multiple pay terms.

Exhibit 1:

Set Finance Process Parameters activity in the **OU Parameter Setup** business component under the **Finance Setup** business process

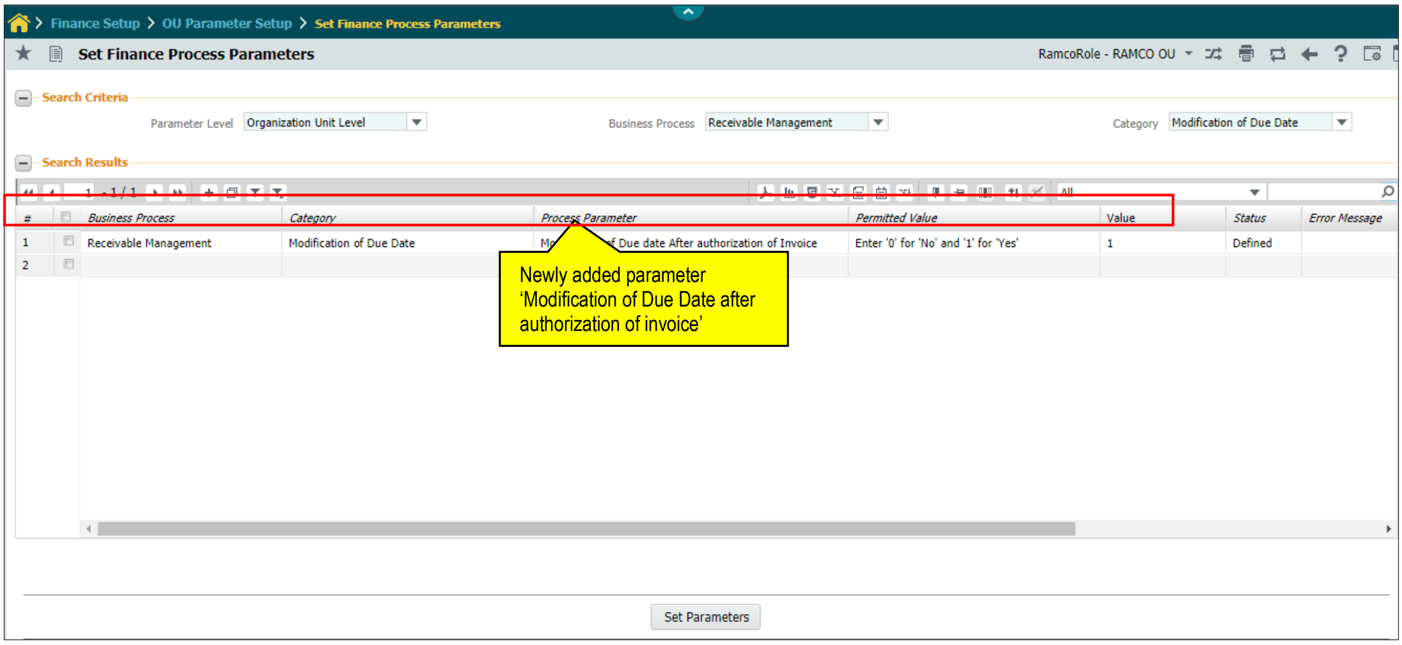
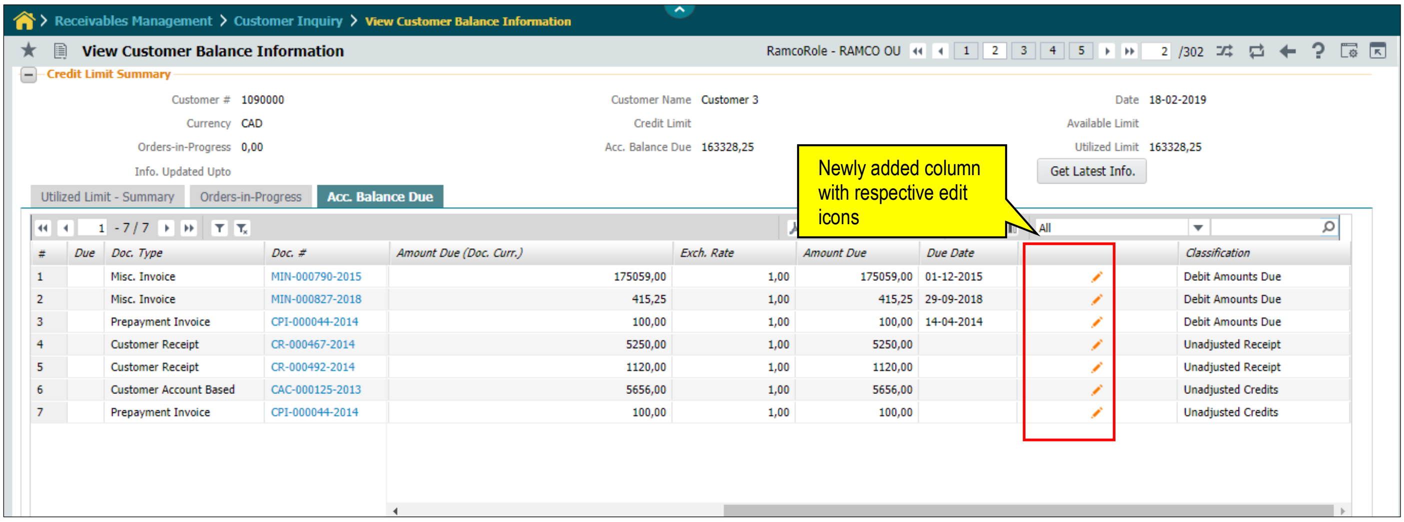


Exhibit 2:

View Customer Balance Information activity in the **Customer Inquiry** business component under the **Recievables Management** business process



WHAT'S NEW IN NOTIFICATIONS & ALERTS?

Alerts, Notifications and Actions (ANA) in Commercials

Reference: AHBG-28564

Background

Notification feature has been designed and developed in the **Ramco Aviation** suite to notify different roles (like Mechanic, Stores clerk, Material Planner, Buyer) to keep them informed of the current happenings and prompt them to perform specific actions. Notifications will be triggered in various screens in **Desktop** and **Mobile Applications** at difference. These notifications enable the target roles (Mechanic, Stores clerk, Material Planner, Buyer) to ascertain various occurrences and act upon the notifications appropriately whenever required.

Change Details

How to access Notifications:

In the **Desktop** system, the users can click the bell icon '' at the top of the application to open **My Inbox**. The icon also displays the current count of unread notification messages. The users can access the entire list of messages from **My Inbox** and proceed to act on them. In case of **Mobile application**, notification will be sent only to registered users identified as those who have logged into the device at least once.

Prerequisites for enabling Notifications:

A. Set Options:

The Notification feature is enabled based on process parameter settings defined under the **Entity Type** 'Notifications' in the **Define Process Entities** activity in **Common Master** business component. Each notification is dependent on a specific process parameter and will be triggered only if the process parameter is set as '1' (Yes). All these process parameters are controlled by a global process parameter 'Enables Notifications?' defined under the **Entity** 'Notifications' and **Entity Type** 'General' in the **Define Process Entities** activity. Only if this global set option is set as 'Yes', the parameters specific to the notifications can be enabled.

B. Configuration Setup:

The configuration Setup requirements for enabling the Notification features are defined in the following documents which will be available in the Maintenance Release:

- Ramco Notifications Service - Overview and Developer Usage.docx
- How-To-Setup.docx
- Steps to be followed in FCM Console.docx

C. Scheduler Details:

Notifications will be triggered by an offline scheduler 'CMN_Notification_Schedular_sp' defined in the document 'Trn-Bsg-EAR5.8.7-SchedulerList.xlsx' which will be available in the Maintenance Release.

Note: Please contact Ramco Support for further details on Configuration Setup Requirements and Scheduler details.

Exhibit 1: Identifies the global process parameter defined in **Set Process Parameters** screen

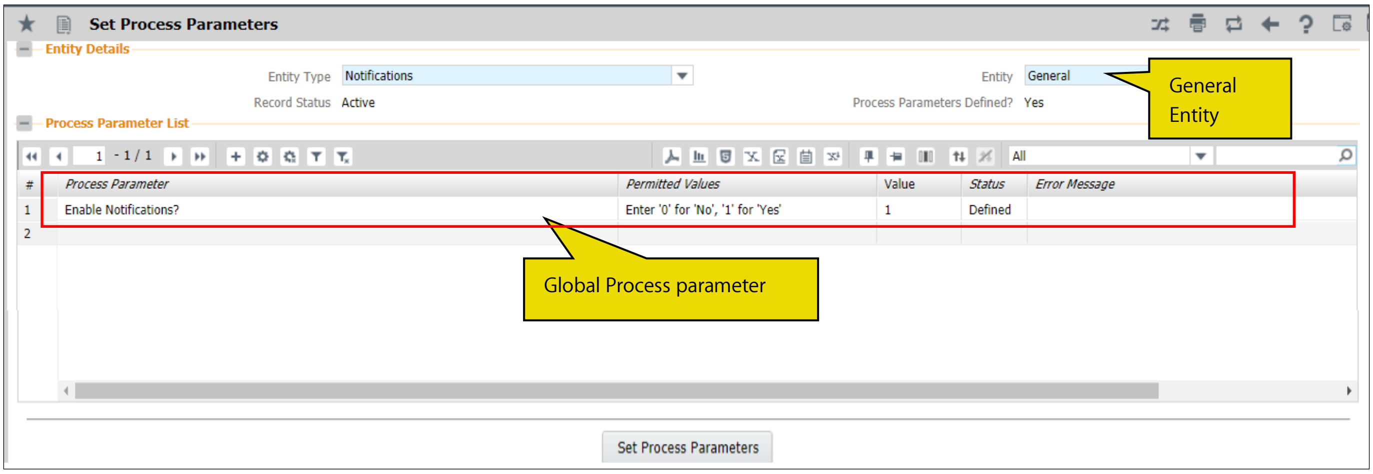
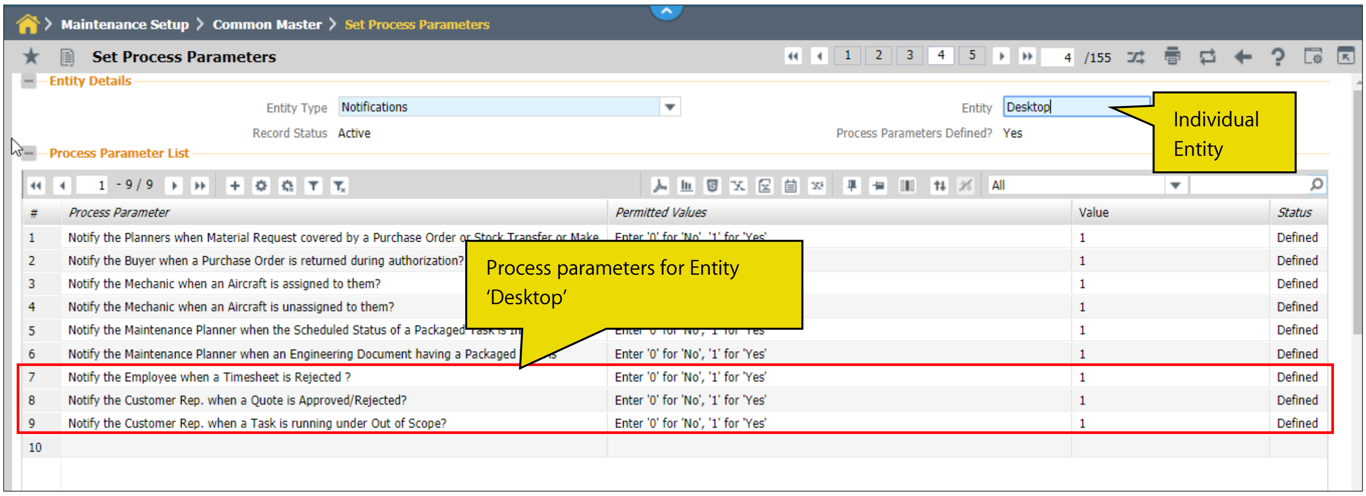


Exhibit 2: Identifies the process parameters under Entity 'Desktop' in **Set Process Parameters** screen



<u>Notification Details:</u>

The Notification details, event, role applicable, target application (Desktop/mobile), sample notification messages and the related action for each notification are explained below:

1. <u>Rejection of Timesheet:</u>

Description	To notify the employee that his/her timesheet is rejected by the supervisor.
Event / Condition	Rejection of Timesheet
User Identification	Employee code whose timesheet got rejected
Target Application	Mech Anywhere, Desktop
Sample Notification Message	Timesheet Rejection

	Your timesheet entry of 2 hours booked for 2018-10-21 on VP-013463-2018 CDP-412152 2018 has been rejected. Please review and rebook.
Action Type on Notification	Tap to Go To UI (Mech Anywhere), Click to read (Desktop)
Action	Desktop - Timesheet UI to be launched with the rejected records in filter iPad - The employees rejected records will be displayed on the manual timesheet page
Process Parameter (**Entity**: Desktop)	Notify the Employee when a Timesheet is Rejected? The process parameter value must be set as 1/Yes to enable the generation of notification.

2. <u>Auto Hold of a job due to an Out of scope condition:</u>

Description	To notify the Mechanic that the out of scope job needs to be estimated.
Event / Condition	<u>Event:</u> Addition / Modification of task in execution document. <u>Condition:</u> When the added task is OOS or the modification results in OOS condition, the notification to be triggered.
User Identification	Mechanic to whom the task is assigned
Target Application	Mech Anywhere, Desktop
Sample Notification Message	As per the contractual terms, Task # 1-EO-TASK-000008 added to the Document # VP-000019-2019 is out of scope. Please record estimates to process customer quote
Action Type on Notification	Tap (to Go To UI (Mech Anywhere), Click to read (Desktop)
Acton	No swipe action in iPad as there is no estimation function there. In desktop, it should launch the estimates page with the WO context.
Process Parameter (**Entity**: Desktop)	Notify the Customer Rep. when a task is running under Out of Scope? The process parameter value must be set as 1/Yes to enable the generation of notification.

3. Approval of Quote:

Description	To notify the CSR that the customer has approved the MRO quote.
Event / Condition	Event: Customer approval / rejection of quote. Condition: When the quote is approved or rejected by the customer through customer anywhere app, the notification has to go to CSR in the desktop
User Identification	CSR identified in the associated quote / CO
Target Application	Desktop
Sample Notification Message	Quote Rejected by Customer Repair Quote CO-008451-2018/0 on Aircraft Reg.# C-FDQV for CAD 2800.00 has been Rejected by British Airways
Action Type on Notification	Click to read
Action	Manage Sale Quote page
Process Parameter (**Entity**: Desktop)	Notify the Customer Rep. when a quote is Approved/Rejected? The process parameter value must be set as 1/Yes to enable the generation of notification.

Exhibit 3:

Notification on rejection of timesheet record

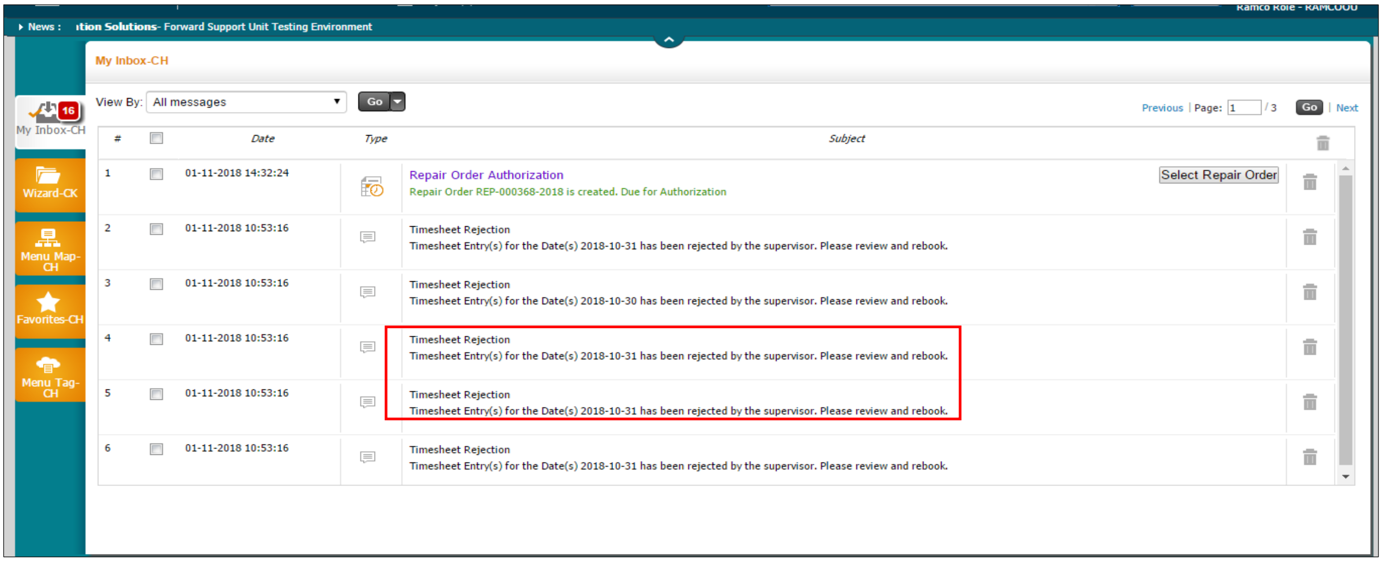
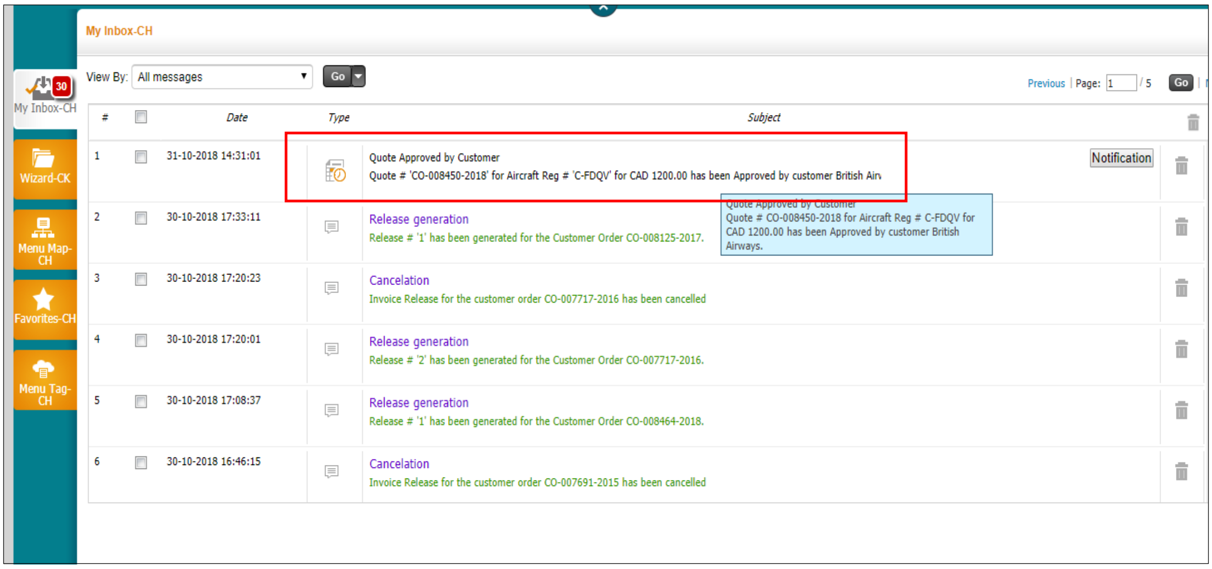


Exhibit 4 :

Notification to CSR about quote approval


My Inbox-CH
View By: All messages
Go
Previous | Page: 1 / 5 Go
Date Type Subject
1 31-10-2018 14:31:01
Quote Approved by Customer
Quote # 'CO-008450-2018' for Aircraft Reg # 'C-FDQV' for CAD 1200.00 has been Approved by customer British Airw
Notification
2 30-10-2018 17:33:11
Release generation
Release # '1' has been generated for the Customer Order CO-008125-2017.
Quote Approved by Customer
Quote # CO-008450-2018 for Aircraft Reg # C-FDQV for CAD 1200.00 has been Approved by customer British Airways.
3 30-10-2018 17:20:23
Cancelation
Invoice Release for the customer order CO-007717-2016 has been cancelled
4 30-10-2018 17:20:01
Release generation
Release # '2' has been generated for the Customer Order CO-007717-2016.
5 30-10-2018 17:08:37
Release generation
Release # '1' has been generated for the Customer Order CO-008464-2018.
6 30-10-2018 16:46:15
Cancelation
Invoice Release for the customer order CO-007691-2015 has been cancelled
My Inbox-CH
Wizard-CK
Menu Map-CH
Favorites-CH
Menu Tag-CH

WHAT'S NEW IN REPORTS?

Ability to generate a preview report - Order Summary Report of Invoice from Invoice Release

Reference: AHBG-26533

Background

When it comes to billing and invoicing, an Invoice Report displays all information about the work package including the actual time booked, parts consumed while resolving a discrepancy.

All these details flow from the Package and the commercials team reviews and makes necessary modifications to the details such that the information is presentable to the Customer. This revised information from the release is printed in the Invoice Report. Since all these information is reviewed and revised in the Invoice Release, it will be easy for the team to review the Invoice report print as well at this stage rather than waiting for the Invoice generation.

Change Details

A new link **Generate Order Summary Report** which will launch the preview of Invoice Report has been introduced in the **Manage Invoice Release** activity of the **Service Sale Billing** business component.

The **Order Summary Report** is designed in a same format as that of the Invoice Report, with all details in the Invoice Release as the reference or input. All details including the resource pricing, materials pricing and actions are taken for rectification.

Exhibit 1:

Manage Invoice Releases activity in the **Service Sale Billing** business component

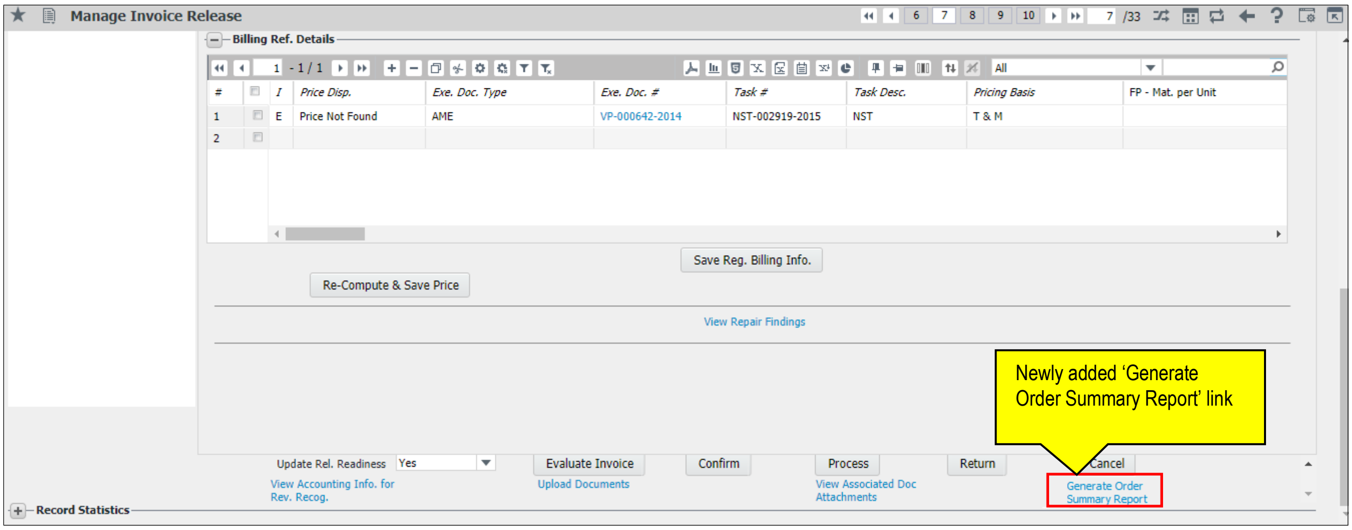


Exhibit 2:

Order Summary Report

Jet East Corporate Aviation

Jet East Corporate Aviation
16 West Piper Avenue
Trenton, New Jersey 08628

ORDER SUMMARY REPORT

CO-000240-2019
02/14/2019

Sold To :

NETJETS SERVICES INC.
4111 Bridgeway Avenue,
Attn: Warranty
Columbus, OH 43219
43219

Work Order # : RS-000225-0219
PO # :
Account # :
Open Date : 02/13/2019
Close Date : 02/13/2019

Aircraft # : N110QS **Type :** BD-700-1A11 **S/N # :** 9592

Landing cycles 8718.00 **Flying Hours** 11457.60 **Flying Cycles** 9738.00

#	Type	Part #	Serial #	Engine Cycles	Engine Hours
1	E	101-8001-55	SCD98		20.0
2	E	101-65400	SCK89		30.0
3	E	101-620010-83	DJK90	50.0	

Discrepancy 1: RS-000225-0219/1

Problem : BASIC CHECK

Action Taken :
01/24
3 AMT CW BASIC CHECK IAW NETJETS FALCON 2000 CIP
10 MAN HRS

Ability to generate Invoice report for Aircraft On-road / Heavy Maintenance jobs

Reference: AHBG-25718

Background

The requirement is to print invoice reports with in a specific format to present the Invoice value to the Customer along with the job details such as the Actions taken to rectify the faults reported and so on.

Therefore a new report has been designed with all the details in the Invoice Release as the reference or input. All details including resource pricing, materials pricing and actions taken for rectification are printed in the Invoice report.

Change Details

The following changes have been made in the Print Invoice activity of the EDK-Reports Receivables Management business component.

- A new drop-down value "Invoice Report – AOG/Heavy Maint' is added to the 'Invoice Type' field.
- The 'Report Option' field lists only the value "Summary Report", if the Invoice Type is selected as 'Invoice Report – AOG/Heavy Maint'.
- The new report is launched with all the details in the Invoice release as the reference or input.

Note: The new format is launched only if the Invoice Type and Report Option are selected as above.

- Each Task/Discrepancy performed in the Execution document will be printed along with the actions taken to rectify the issue reported, resource consumption and price, materials consumed with rates applied and any additional charges incurred during the task such as, external services procured.
- All of the above details will be printed from the corresponding Invoice Release of the Customer Service Invoice.

Report Sections:

Unlike the other Quotation reports available in the application, this report depicts the complete details of the job, such as:

i. Aircraft parameter details, as recorded by Technicians during Heavy maintenance
ii. Task/Discrepancy details with the steps performed which could be in form of Corrective actions.
iii. Man hours and Materials consumed/reported against each task/discrepancy
iv. Labor and material prices
v. Warranty coverage against Task / Resource / Materials with Warranty bill to OEM as reference
vi. Additional charges incurred
vii. Prepayment details

Exhibit 1:

Identifies the **Print Invoice** screen in the **EDK-Reports Receivables Management** business component:

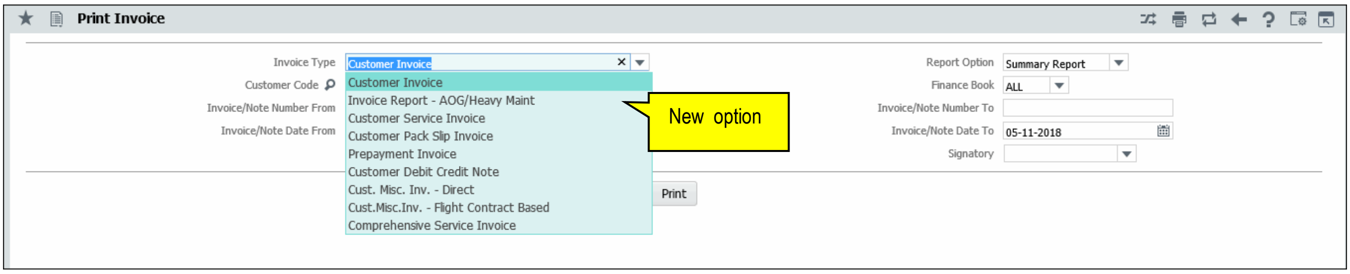
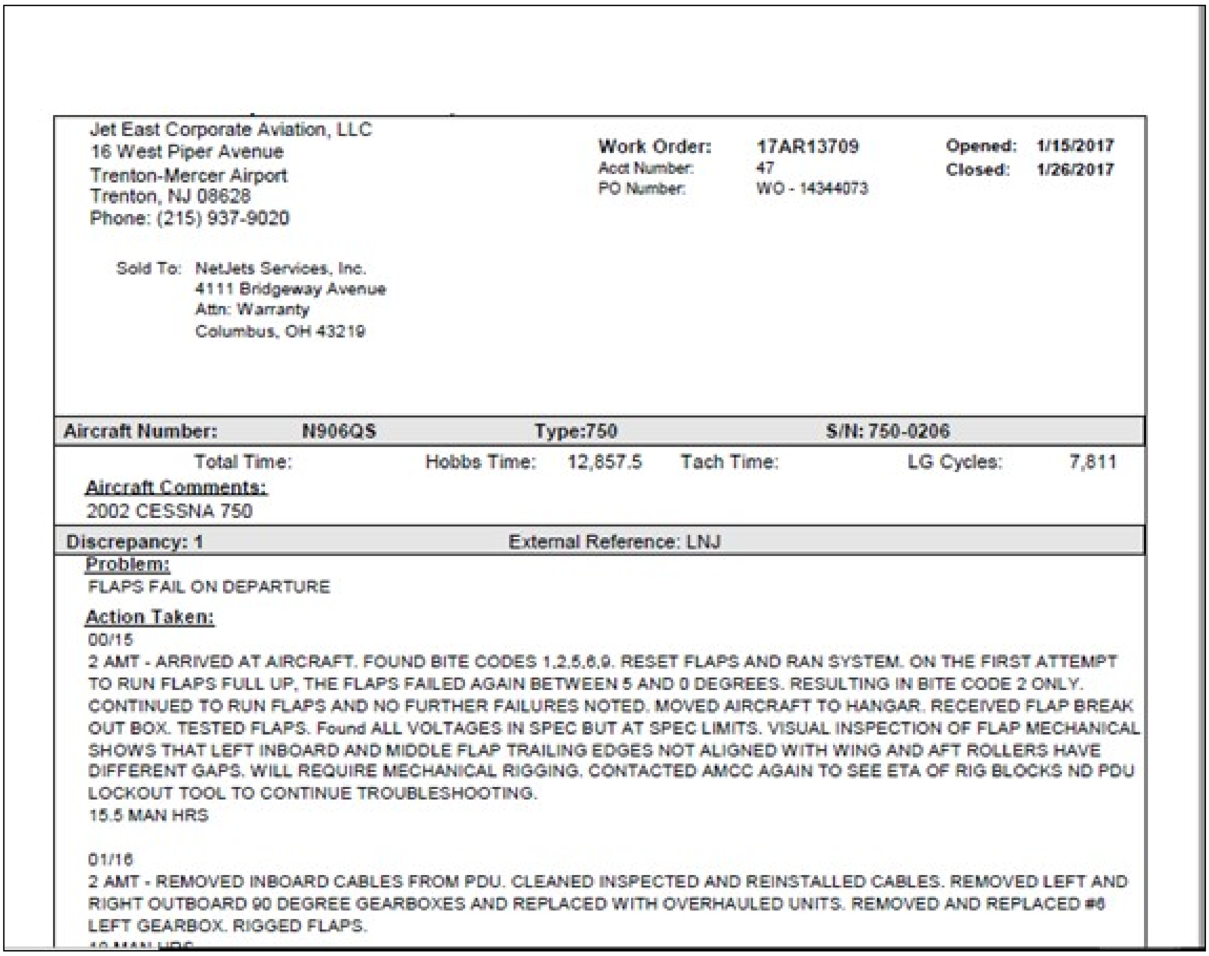


Exhibit 2:

Identifies the **Invoice Report** generated from the **Print Invoice** activity


Jet East Corporate Aviation, LLC
16 West Piper Avenue
Trenton-Mercer Airport
Trenton, NJ 08628
Phone: (215) 937-9020

Work Order: 17AR13709
Acct Number: 47
PO Number: WO - 14344073

Opened: 1/15/2017
Closed: 1/26/2017

Sold To: NetJets Services, Inc.
4111 Bridgeway Avenue
Attn: Warranty
Columbus, OH 43219

Aircraft Number: N906QS **Type:750** **S/N: 750-0206**

Total Time: Hobbs Time: 12,857.5 Tach Time: LG Cycles: 7,811

Aircraft Comments:
2002 CESSNA 750

Discrepancy: 1 External Reference: LNJ

Problem:
FLAPS FAIL ON DEPARTURE

Action Taken:
00/15
2 AMT - ARRIVED AT AIRCRAFT. FOUND BITE CODES 1,2,5,6,9. RESET FLAPS AND RAN SYSTEM. ON THE FIRST ATTEMPT TO RUN FLAPS FULL UP, THE FLAPS FAILED AGAIN BETWEEN 5 AND 0 DEGREES. RESULTING IN BITE CODE 2 ONLY. CONTINUED TO RUN FLAPS AND NO FURTHER FAILURES NOTED. MOVED AIRCRAFT TO HANGAR. RECEIVED FLAP BREAK OUT BOX. TESTED FLAPS. Found ALL VOLTAGES IN SPEC BUT AT SPEC LIMITS. VISUAL INSPECTION OF FLAP MECHANICAL SHOWS THAT LEFT INBOARD AND MIDDLE FLAP TRAILING EDGES NOT ALIGNED WITH WING AND AFT ROLLERS HAVE DIFFERENT GAPS. WILL REQUIRE MECHANICAL RIGGING. CONTACTED AMCC AGAIN TO SEE ETA OF RIG BLOCKS ND PDU LOCKOUT TOOL TO CONTINUE TROUBLESHOOTING.
15.5 MAN HRS

01/16
2 AMT - REMOVED INBOARD CABLES FROM PDU. CLEANED INSPECTED AND REINSTALLED CABLES. REMOVED LEFT AND RIGHT OUTBOARD 90 DEGREE GEARBOXES AND REPLACED WITH OVERHAULED UNITS. REMOVED AND REPLACED #6 LEFT GEARBOX. RIGGED FLAPS.

Additional Changes in Invoice Preview Report

Reference: AHBG-28984

Background

This enhancement pertains to additional changes to show the charges added with a reference task in Invoice Release to be printed against the corresponding tasks. To give transparency in pricing to the customer, provision is required to also indicate jobs covered under warranty.

Change Details

In the customized report, the following changes have been made:

1. The Task, Parts, Labour which are covered under warranty will be subtracted and shown separately under 'Less Warranty Labour' section in the report.
2. The final value for the mentioned respective task will be excluding warranty.
3. Warranty comments against the excluding Part/Labour will be displayed.
   Warranty Final invoice to be captured in the invoice report.
4. Station name will be displayed in the center of the header section of the report.
5. Company logo will be displayed in the invoice report.

- **Quote Report**
  Service Sale Billing > Service Sale Quote > Manage Sale Quotation > Print Quote link
  Sales Management > Sales Report > Print Quote
- **Invoice Preview Report**
  Service Sale Billing > Process Invoice > Manage Invoice Release > Print Report
- **Print Invoice**

  Receivables Management > EDK Reports Receivables Management > Manage Invoice Release > Print Invoice

The following changes have been made in the above mentioned reports.

- ✓ The Task / Discrepancy or any of its elements, that are covered under Warranty will be indicated in the Quote Report.
- ✓ If the Labor Hour corresponds to a Roster Code which mentions the third shift, then the text, 'Third Shift Rate applies" text will be printed below the labor rates.
- ✓ Provision has been given to print the label 'Airport' in Bold to the right of the label 'Sold To'.
- ✓ The Exec. Station Description /Name in which the Aircraft Package is created will be printed against the above mentioned label
- ✓ The label 'Other Charges' will be printed in bold below the 'Part Details' section.
- ✓ All Charge Codes with the respective Task / Discrepancy # as 'Ref. Task' will be printed one below the other format given below:
- ▪ Charge Code
- ✓ The 'Other Charges Section' along with TCD codes without any Task / Discrepancy reference will also printed in this section.

Ability to generate a quote report for heavy maintenance jobs

Reference: AHBG-25723

Background

The requirement is to send to customers a quote report with details of the job such as the part requirements, sublet services along with the pricing for the Resources and Parts.

Change Details

A new link **Print Quote** has been added in the **Manage Sale Quote** activity of the **Sale Quotation** business component which launches a new screen to generate the Quotation Report. This report has been designed in the required format with all details in the Invoice Release as the reference or input. All details including the resource pricing, materials pricing and actions taken for rectification has been included in this report.

*Note: Quotation can also be printed using the same screen from a new activity under the **Sales Management** business component and Sale Management reports function. The activity will launch the same screen said above.*

Report Sections:

Unlike the other Quotation reports available in the application, this report depicts the complete details of the job, such as;

i. Aircraft parameter details, as recorded by Technicians during Heavy maintenance
ii. Task/Discrepancy details with the steps performed which could be in form of Corrective actions.
iii. Man hours and Materials estimated/quoted against each task/discrepancy
iv. Labor and material prices
v. Warranty coverage against Task / Resource / Materials
vi. Additional charges incurred

Exhibit 1:

Manage Sale Quotation activity in the **Service Sale Management** business component

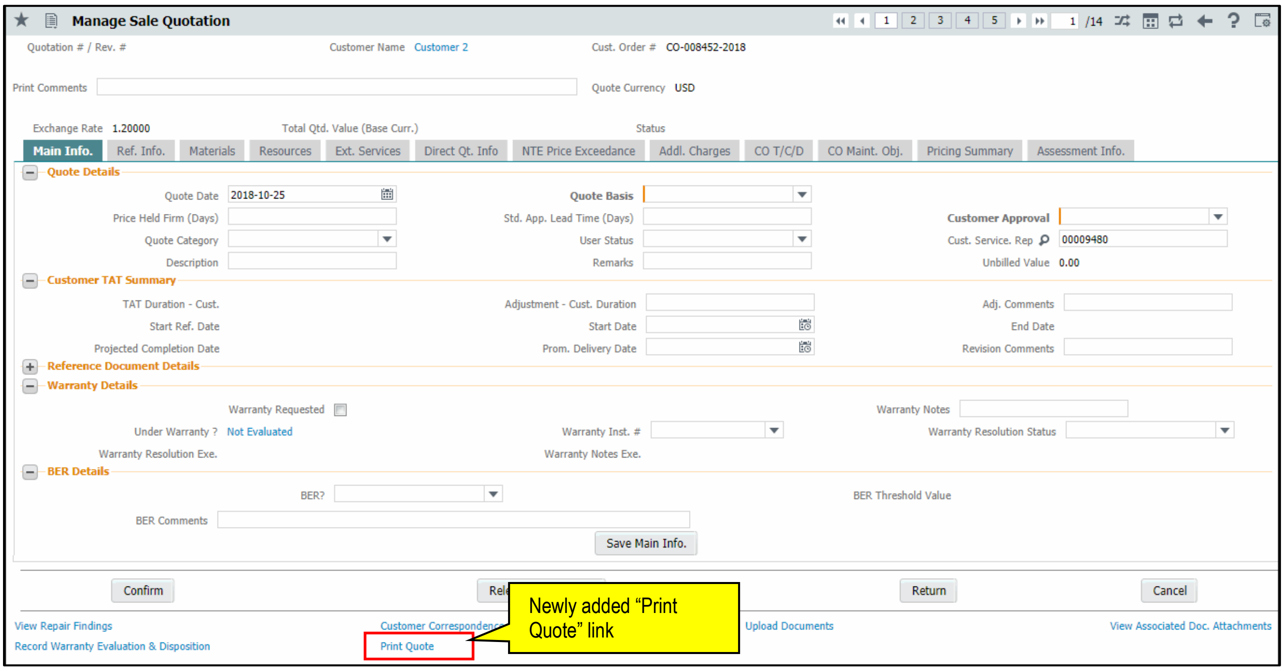


Exhibit 2:

Print Quote Invoice screen in the **Sales Management Reports** business component

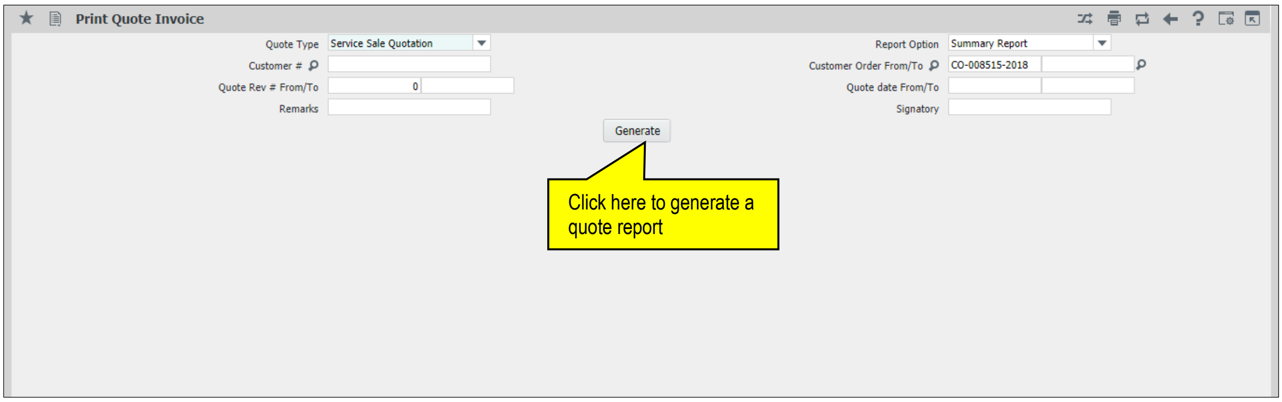
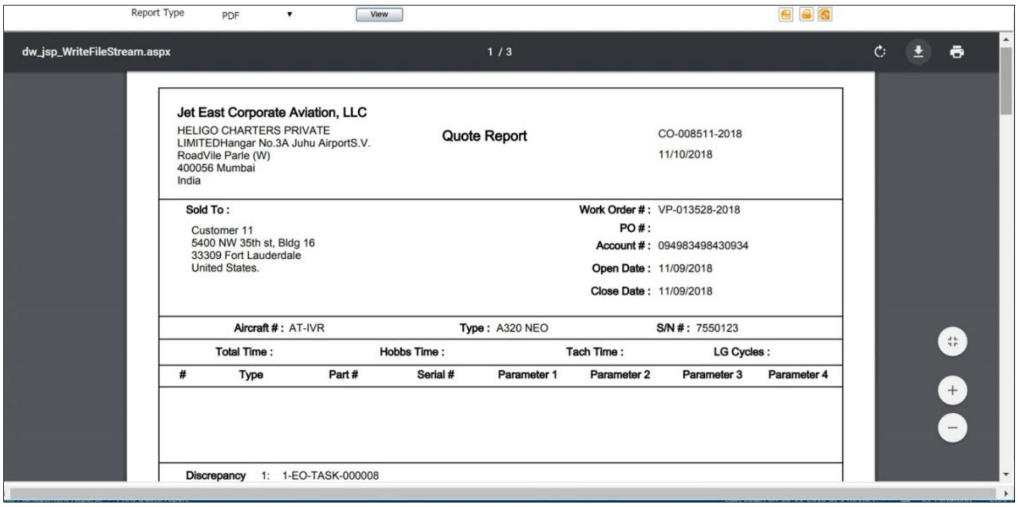


Exhibit 3:

Quote Report



Ability to generate an Order Profitability Report

Reference: AHBG- 27027

Background

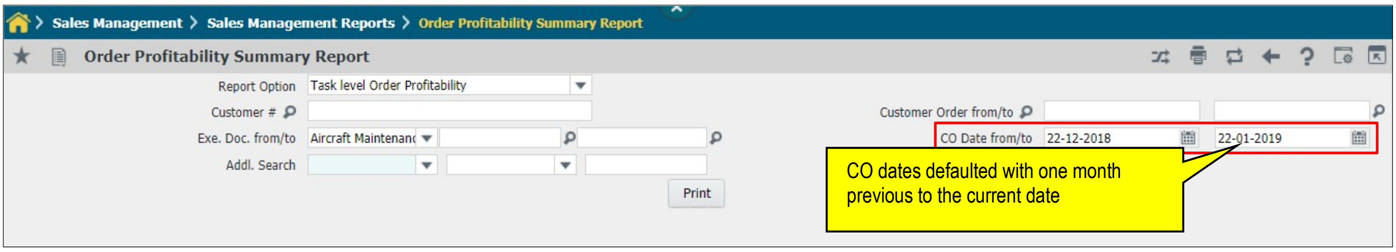
Every organization analyzes the jobs offered to customers over a given period of time to check on the profit incurred. The analysis usually involved comparison between the cost and the revenue element wise. In addition to the cost and revenue, organizations would also like to analyze the man hours booked by the employee against a job versus what has actually been billed to the customer to measure the efficiency.

Change Details

A new activity Generate Order Profitability Summary has been developed under the Sales Management Reports business component to enable the user to search the records either based on the Customer #, Execution Doc # or Customer Order From / To dates and generate the Order Profitability Report. This report will show the cost and revenue against elements such as Resources, Materials, and other services along with the required man hours logged in Vs. the man hours billed at the task level.

Exhibit 1:

Order Profitability Summary Report in the **Sales Management Reports** business component



The Generate Order Profitability Summary activity has the following fields:

- Report Option - Defaults with the option "Task Level Order Profitability"
- Customer #
- Customer Order From/ To
- Exe. Doc. From/To
- CO Date From/To
- Additional Search

  Loaded with the options:

  a) Aircraft Reg. #

  b) Exec. Doc. Status

Exhibit 2:

Order Profitability Summary Report – Excel in the **Sales Management Reports** business component of the **Sales Management** business process

Order Profit Summary Report								
Customer #	**Customer Name**	**Contract #**	**Customer**	**Order Desc.**	**Customer Order Date**	**Execution Document**	**Pricing Task**	**Ta**
400006	British Airways	JetEast-02	CO-008737-	Autogenerated	28-12-2018	VP-013876-2018		AFRO-00
400006	British Airways	JetEast-02	CO-008737-	Autogenerated	28-12-2018	VP-013876-2018		PO-00112
400006	British Airways	JetEast-02	CO-008737-	Autogenerated	28-12-2018	VP-013876-2018	800	800
400006	British Airways	JetEast-02	CO-008737-	Autogenerated	28-12-2018	VP-013876-2018	NST-027212-	NST-0272
400006	British Airways	JetEast-02	CO-008737-	Autogenerated	28-12-2018	VP-013876-2018	NST-027213-	NST-0272
SUB TOTAL								

Ability to generate Invoice report for Aircraft On-road Maintenance jobs

Reference: AHBG-25718

Background

The requirement is to print invoice reports with in a specific format to present the Invoice value to the Customer along with the job details such as the Actions taken to rectify the faults reported and so on.

Therefore a new report has been designed with all the details in the Invoice Release as the reference or input. All details including resource pricing, materials pricing and actions taken for rectification are printed in the Invoice report.

Change Details

The following changes have been made in the Print Invoice activity of the EDK-Reports Receivables Management business component.

- A new drop-down value "Invoice Report – AOG/Heavy Maint' is added to the 'Invoice Type' field.
- The 'Report Option' field lists only the value "Summary Report", if the Invoice Type is selected as 'Invoice Report – AOG/Heavy Maint'.
- The new report is launched with all the details in the Invoice release as the reference or input.

Note: The new format is launched only if the Invoice Type and Report Option are selected as above.

- Each Task/Discrepancy performed in the Execution document will be printed along with the actions taken to rectify the issue reported, resource consumption and price, materials consumed with rates applied and any additional charges incurred during the task such as, external services procured.
- All of the above details will be printed from the corresponding Invoice Release of the Customer Service Invoice.

Exhibit 1

Identifies the **Print Invoice** screen in the **EDK-Reports Receivables Management** business component:

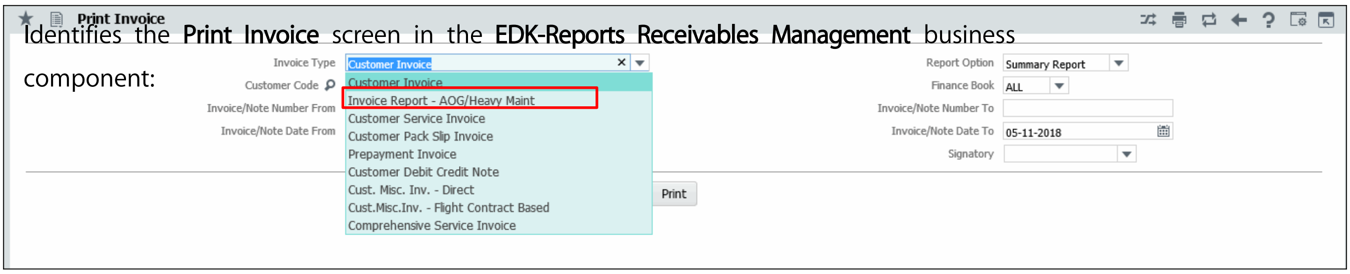


Exhibit 2:

Identifies the **Invoice Report** generated from the **Print Invoice** activity

Jet East Corporate Aviation, LLC
16 West Piper Avenue
Trenton-Mercer Airport
Trenton, NJ 08628
Phone: (215) 937-9020

Work Order: 17AR13709
Acct Number: 47
PO Number: WO - 14344073

Opened: 1/15/2017
Closed: 1/26/2017

Sold To: NetJets Services, Inc.
4111 Bridgeway Avenue
Attn: Warranty
Columbus, OH 43219

Aircraft Number: N906QS **Type:750** **S/N: 750-0206**

Total Time: Hobbs Time: 12,857.5 Tach Time: LG Cycles: 7,811

Aircraft Comments:
2002 CESSNA 750

Discrepancy: 1 External Reference: LNJ

Problem:
FLAPS FAIL ON DEPARTURE

Action Taken:
00/15
2 AMT - ARRIVED AT AIRCRAFT. FOUND BITE CODES 1,2,5,6,9. RESET FLAPS AND RAN SYSTEM. ON THE FIRST ATTEMPT TO RUN FLAPS FULL UP, THE FLAPS FAILED AGAIN BETWEEN 5 AND 0 DEGREES. RESULTING IN BITE CODE 2 ONLY. CONTINUED TO RUN FLAPS AND NO FURTHER FAILURES NOTED. MOVED AIRCRAFT TO HANGAR. RECEIVED FLAP BREAK OUT BOX. TESTED FLAPS. Found ALL VOLTAGES IN SPEC BUT AT SPEC LIMITS. VISUAL INSPECTION OF FLAP MECHANICAL SHOWS THAT LEFT INBOARD AND MIDDLE FLAP TRAILING EDGES NOT ALIGNED WITH WING AND AFT ROLLERS HAVE DIFFERENT GAPS. WILL REQUIRE MECHANICAL RIGGING. CONTACTED AMCC AGAIN TO SEE ETA OF RIG BLOCKS ND PDU LOCKOUT TOOL TO CONTINUE TROUBLESHOOTING.
15.5 MAN HRS

01/16
2 AMT - REMOVED INBOARD CABLES FROM PDU. CLEANED INSPECTED AND REINSTALLED CABLES. REMOVED LEFT AND RIGHT OUTBOARD 90 DEGREE GEARBOXES AND REPLACED WITH OVERHAULED UNITS. REMOVED AND REPLACED #6 LEFT GEARBOX. RIGGED FLAPS.

WHAT'S NEW IN PART SALE ORDER?

Ability to allocate parts against Sale Order based on the need date of the part

Reference: AHBG-29034

Background

Sometimes during Part Sales, the MRO receives requests for provisional orders from customers in which the MRO holds an agreement to place orders for certain parts to be delivered ranging over a certain period of time. In such cases, it is required to record a Part Sale Order however no parts must be allocated or issued to the Customer until the date of actual requirement.

Therefore the requirement is for a provision to capture the lead time for generating MR based on the expected delivery date of the parts in Part Sale Order and auto generating the MR based on scheduler on need date

Changes

- Two Set Options have been introduced against the Part Sale Type in the **Define Process Entities** activity of the **Common Master** business component to define whether MR generation is to be postponed till the lead date for demand and the standard lead days for MR generation.

#	Process Parameter	Permitted Values
1	Postpone MR Generation until Lead date	Enter: • "0" for "No" • "1" for "Yes"
2	Default lead time (in days) for MR generation	• Enter the valid No. of Days

  During approval of the PSO, if the above set option is 'Yes' MR generation would be stalled and queued up for generation later on the lead date.

- A new "Planning Status" has been introduced in the **Manage Part Sale Order** activity of the **Part Sale Order** business component to differentiate the Approved and Processed stages of the PSO.
- A new column "Lead Days For Demand" has been added in the Part Info section Which will be defaulted with the value set against the parameter "Default Lead Time (in days) for MR generation. User will be able to modify the same in the PSO if required based on which the MR will be generated"

Note: The system does not allow modifications to the "Lead Days For Demand" column if the MR is already generated.

- A new display only column 'Proc. Lead Time' has been added in the Part Info multiline which displays the standard purchase lead time for the supplier-part# combination in case of 'Regular/Drop shipment' procurement.

Exhibit 1:

Set Process Parameters link in the **Define Process Activities** screen under the **Common Master**

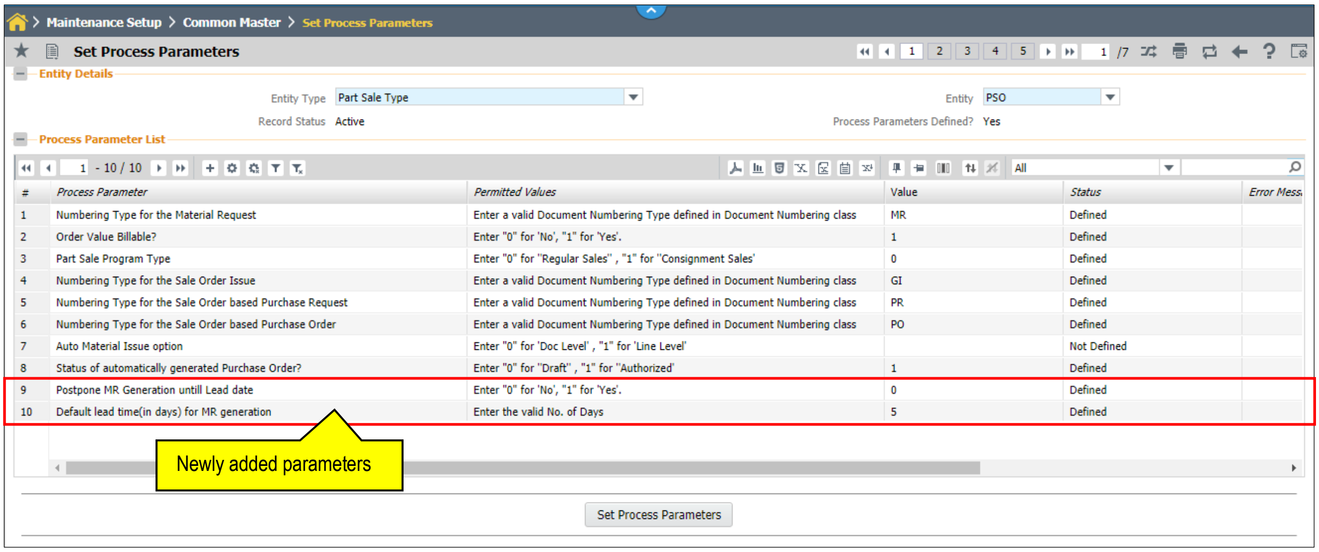


Exhibit 2:

Manage Part Sale Order activity in the **Part Sale Order** business component

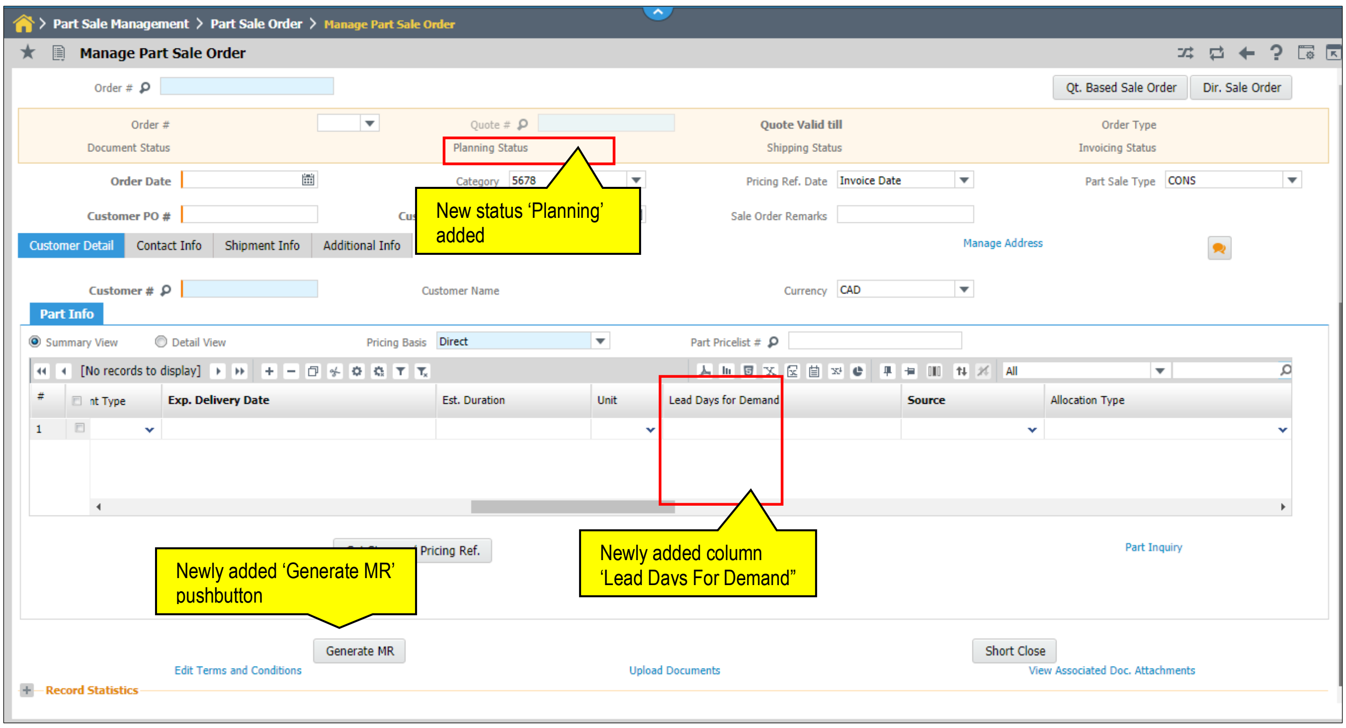
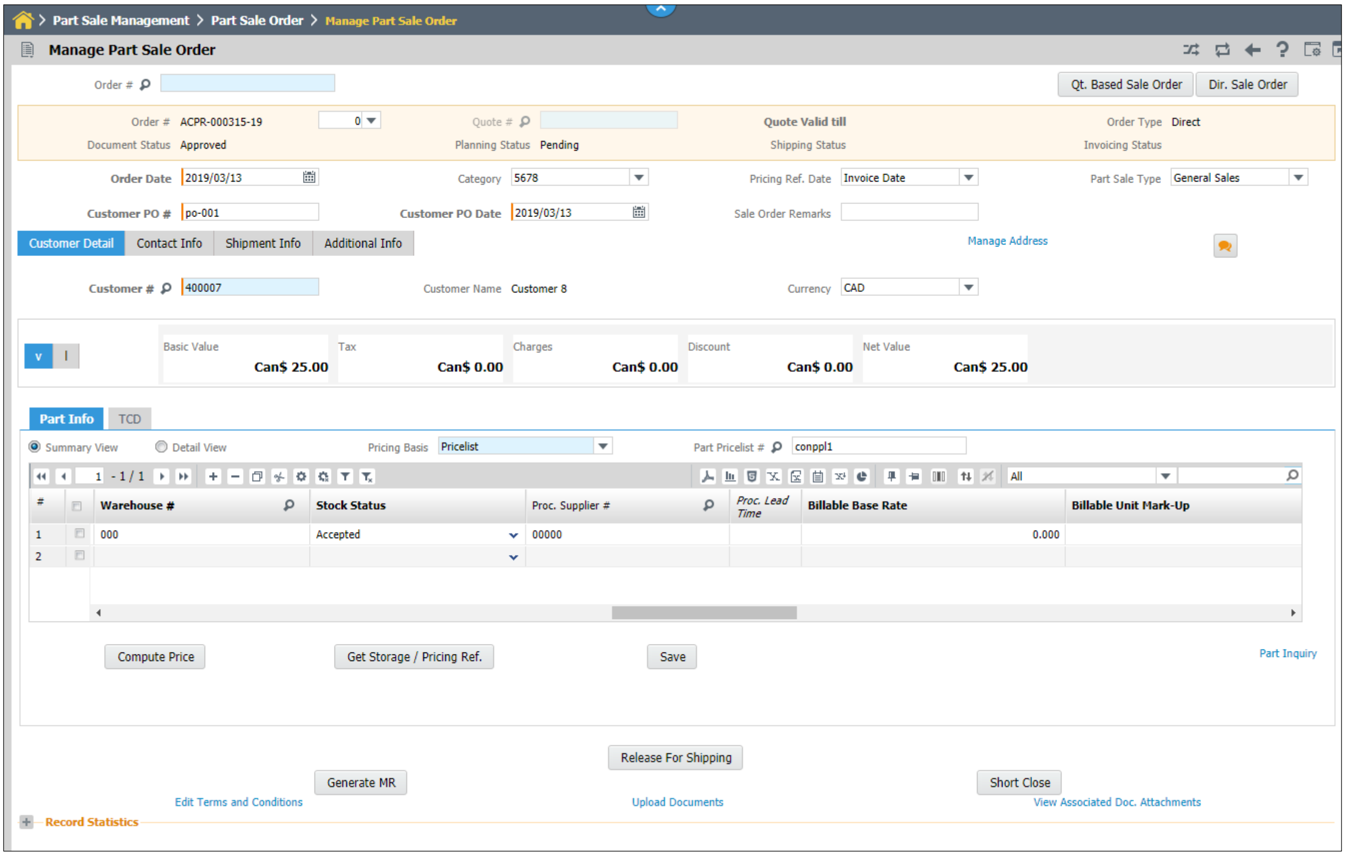


Exhibit 3:

Manage Part Sale Order activity in the **Part Sale Order** business component



WHAT'S NEW IN PRE-ORDER QUOTATION?

Ability to render pre-quote based billing

Reference: AHBG-27535

Background

During performing component maintenance jobs, the MRO quotes a fixed price to the customer for the work requested prior to registering an order. When the customer accepts the quote, an order is placed and the component will be received for maintenance. However, sometimes there might be any additional discrepancy identified during Maintenance execution for which an incremental quote will be provided for the additional work along with the regular tasks requested. If no discrepancy / additional work is identified, then the billing would be done based on the pre-quote provided.

Currently, billing can be done either based on quote or actuals against the Customer Order. Therefore provision is required to generate bill based on Pre-Order Quotation

Change Details

Part Sale Management > Pre-Order Quotation > Manage Pre-order quotation

- An additional column 'Qt. Line #' has been introduced in the multiline of the **Primary Quote - Services** tab page in the 'Customer Info' section. The Core Part and its Line number will be displayed in this column.
- Additional columns 'Ref. Type' and 'Line #' has been introduced in the multiline of the **TCD** tab page in the 'Customer Info' section. The Core Part and its Line number will be displayed in this column.
    - **Ref. Type**
        a) Document
        b) Object Info.
    - **Line #**
        a) Line # of 'Object Info' tab would be displayed in Line # column if applicability is specified as 'Part'.

Auto Quote generation on Customer Order Approval

When Customer Order is generated based on an approved Pre-order quotation, on approval of Customer Order, the pre-quote information will automatically be copied to a Sale Quotation.
The details of Pre-quote will be retrieved as Direct Quote information in Sale Quotation.

When there are additional scope pf services being identified during execution of the job, they would be incrementally estimated and the same would appear in Quote along with the previously quoted tasks with the Fixed Price. This information will be part of the Regular quote information.

Note: User must manually go and remove the pre-quote information from Direct Quote information tab to avoid duplicate billing for same task.

Pre-Quote based Invoice Release:

In cases where there was no additional scope identified during the execution and the sale quote carries only information from Pre-quote, the approved quote value gets copied to Invoice release (from the Direct quote information). The details would be retrieved under the Regular billing information tab of Manage Invoice Release screen.

Exhibit 1:

Primary Quote tab in the **Manage Pre-Order Quotation** activity of the **Pre-order Quotation** business component

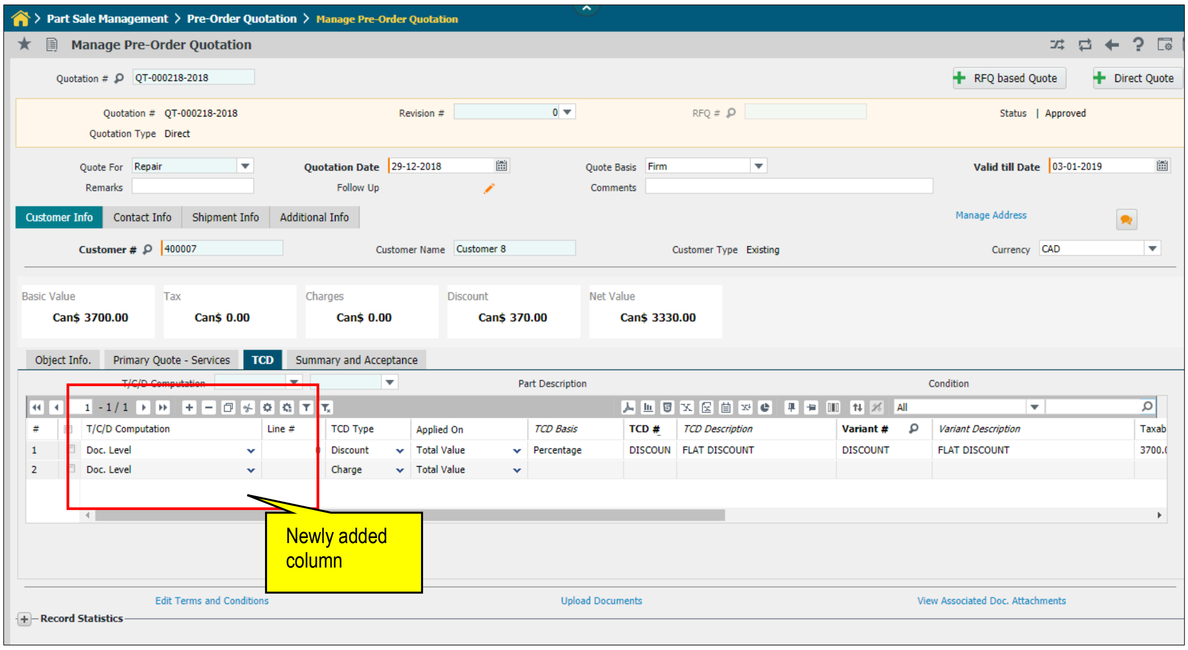
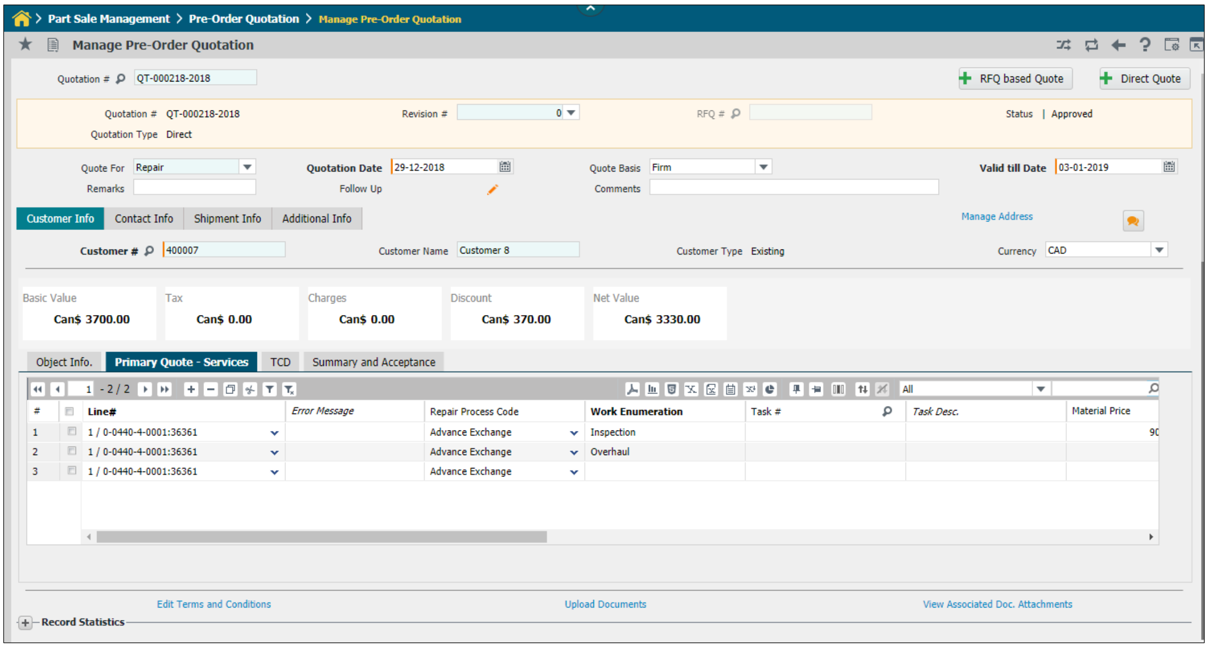


Exhibit 2:

TCD tab in the **Manage Pre-Order Quotation** activity of the **Pre-order Quotation** business component



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