RAMCO AVIATION SOLUTION

ENHANCEMENT NOTIFICATION

Version 5.9.0

Commercials

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WHAT'S NEW IN SALES SETUP?

Ability to set Contract Exclusions based on Engineering Document attributes

Reference: APRP-340

Background

In most of the business scenarios in component repair (Performed both internally as well as externally), jobs can be either included/excluded from the agreed pricing depending upon certain engineering attributes of tasks/work scope being performed on those particular components.

For example:

- A repair job should be classified as included, if the repair is done for a SB bulletin performed within three months of SB release date and the same job should be considered as exclusion if performed after certain period of time post SB release date.
- In ITM business model, repair jobs performed on components for Engineering Order tasks, for agreed quantity of parts serviced for those EO tasks will be charged to the customers on a certain price basis, after which the repair jobs would be non-chargeable.

Thus, the requirement is to have a provision to define the inclusion and exclusion definitions in Sale Contract based on certain engineering order/task attributes and evaluate and price the engineering tasks based on these inclusions and exclusion definitions.

Change Details

- A new parameter is added in **Sales Setup > Customer > Set Sales Process Parameter** screen to specify whether the Eng. Doc. scope evaluation based on Advanced Exclusion rules is 'Required' or 'Not Required'. Another parameter is added in same screen to specify whether the restricted parts from the Engineering document should be excluded based on restriction code.**(Exhibit-1)**
    1. Display Parameters for : MRO Sales
       Parameter for : Advanced Excl. rules for EO
       Process Parameter : Eng. Doc. scope evaluation based on Advanced Exclusion rules
       Permitted Value : '0' for Not Required, '1' for Required
       If the above parameter is set as:
        - Required : The column grouping mentioned below will be visible in 'Incl. & Excl. – Task' tab in 'Manage Sale Contract'
            a. Eng.Doc attributes
            b. Eng.Doc.Eff.Date Ref.
            c. Eng. Reference
            d. Eng. Restrictions
            e. Eng. Task exclusions - value coverage
        - Not Required: The above column grouping would be hided which suits business models for which exclusion definitions are not applicable based on engineering attributes.

2. Display Parameters for : MRO Sales
   Parameter for : Advanced Excl. rules for EO
   Process Parameter : Restriction Code based on which Engineering Changes on Components to be excluded
   Permitted Value : Specify "0" for "Not Applicable" or a valid Restriction Code
   If the above parameter is set as
   - Not Applicable: 'Restriction Code' column in 'Incl. & Excl. – task' tab would be loaded with blank.
   - Valid Restriction code: 'Restriction Code' column in 'Incl. & Excl. – task' tab would be loaded with value defined against the parameter.

3. New Columns have been added in the 'Excl. & Incl. – Task' tab in the **Contract Main Info.** Page under **Sales Setup > Sale Contract > Manage Sale Contract** screen to define the exclusions and inclusions definitions for tasks based on engineering attributes. All the columns under this tab are grouped under multiple sections depending on the type of information being provided.

   - **Eng. Doc. Attributes** column grouping contains the columns related to engineering document to define exclusion definitions. The following are the newly added controls under this group **(Exhibit-2)** :
     a. Applicability: Loaded with values as Blank, Component, Engine, Aircraft
     b. Eng. Class: Loaded with values as Blank, Replacement, Retro fitment, Task Improvisation, Task schedule related and Informative
     c. Mandatory: Indicates 'Yes' or 'No' against Engineering Document
     d. Reliability: Loaded with values as Blank, Yes and No.
     e. Certifying Authority: Loaded with all the Active 'Certifying Authority' under **Maintain Certifying Authority** screen under **Logistics Common** Master Component.
     f. User defined controls - to be loaded with all the 'Active' quick codes defined under the resp. quick code type in the **Edit Quick Codes** screen under **Maintenance Change Request** component.

   - **Eng.Doc. Eff.Date Ref.** column grouping contains the columns to define the specific period based exclusions for engineering document. The following are the newly added controls under this group (**Exhibit -3**) :
     a. Date Incl.: Loaded with values 'Blank', 'Less than or equal', 'Less than', 'Greater than or equal' and 'Greater than'
     b. Incl. Period: Indicates the actual value of time period.
     c. UOM: Loaded with the values 'Blank' and 'Months'

   - **Eng. Reference** column grouping contains the columns to define exclusions only for Covered Qty. agreed with the customers. The following are the newly added controls under this group (**Exhibit-3**) :

a. Eng. Doc #: Indicates the Engineering Document #
b. Part #: Indicates the Part in Engineering Document
c. Covered Qty. : Indicates the Qty. which is covered with a particular pricing basis
d. Pricing – Covered Qty. : Loaded with values 'Blank', 'Non-Billable', 'T&M' and 'Fixed Price'
e. Rem. from A/c Reg. #: Indicates the A/c Reg. # in Engineering Document
f. Rem. from A/c Model: Indicates the A/c Model # in Engineering Document

- Eng. Restrictions column grouping contains the columns to define part restrictions based on restriction codes. The following are the newly added controls under this group(Exihibit-4) :
  a. Restriction: Loaded with values 'Yes', 'No' and blank.
  b. Restriction Code: Loaded with 'blank' and restriction code set in Set Sales Process Parameters

- Eng. Task Excl. - Value coverage contains the columns to define cap values for engineering tasks if applicable. The following are the newly added controls under this group(Exhibit-4) :
  a. Computation Basis: Loaded with values as 'Percentage based' , 'Flat Value' and 'Blank'
  b. Covered Cap Value: Indicates the covered cap value.

Note:

Exclusion Definition against the above mentioned column, attributes can be defined only for Contract with Object Applicability: 'Parts'. Eng. Doc. Attributes based inclusion/exclusion definitions for an 'Aircraft' contract

Exhibit 1:

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

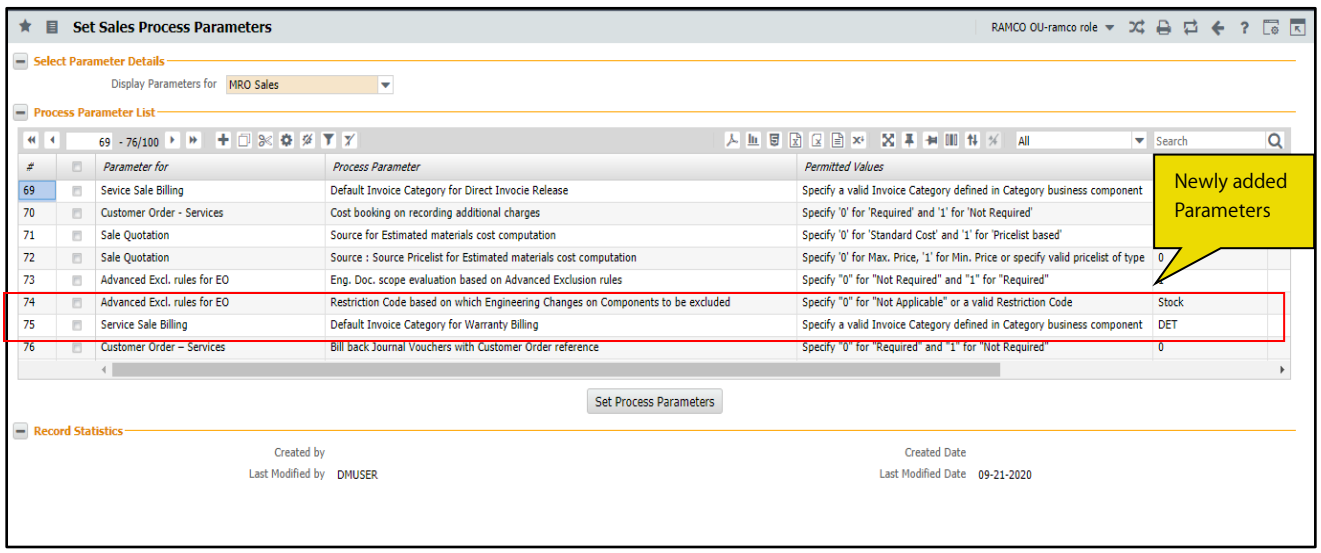


Exhibit 2:

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

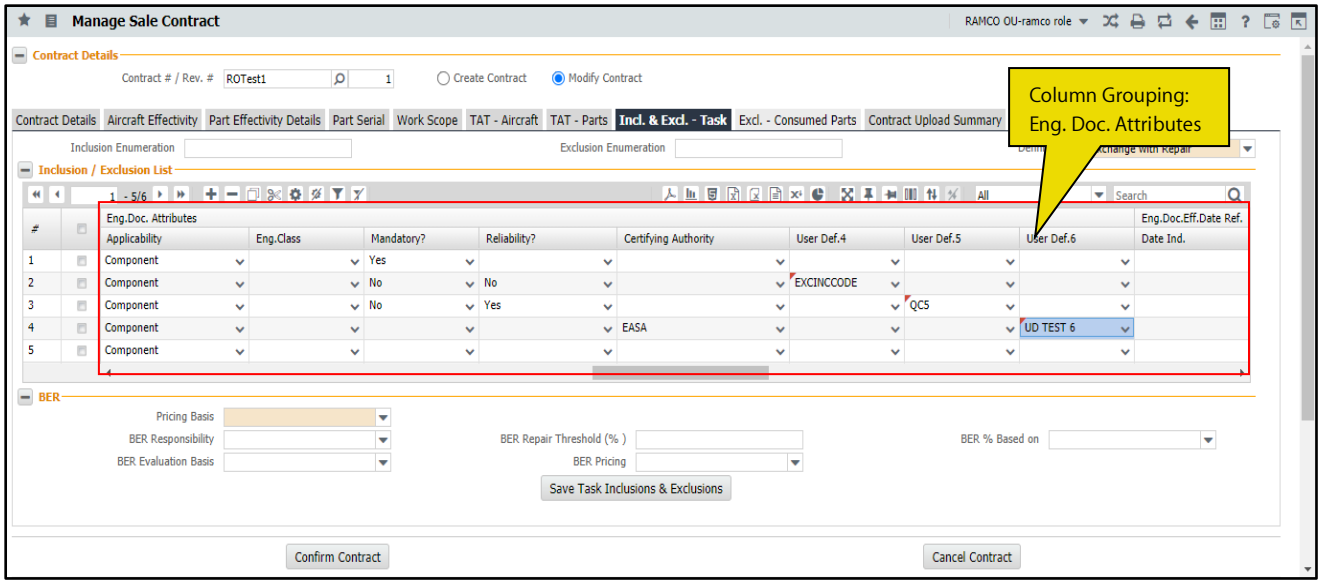


Exhibit 3:

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

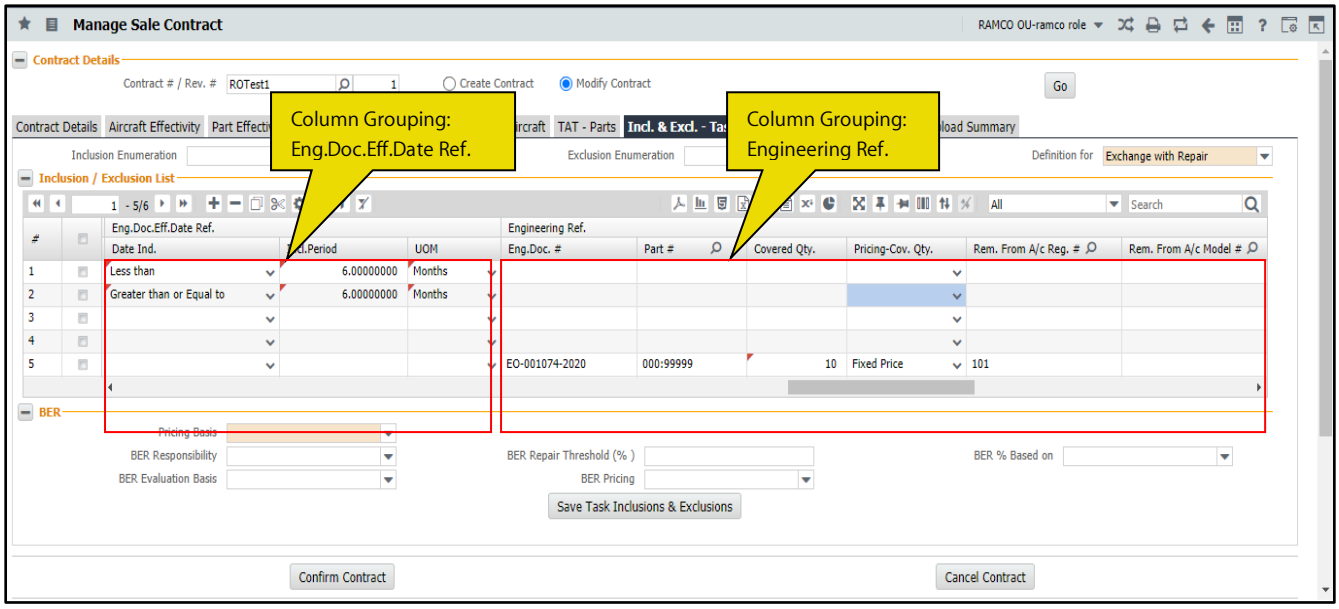
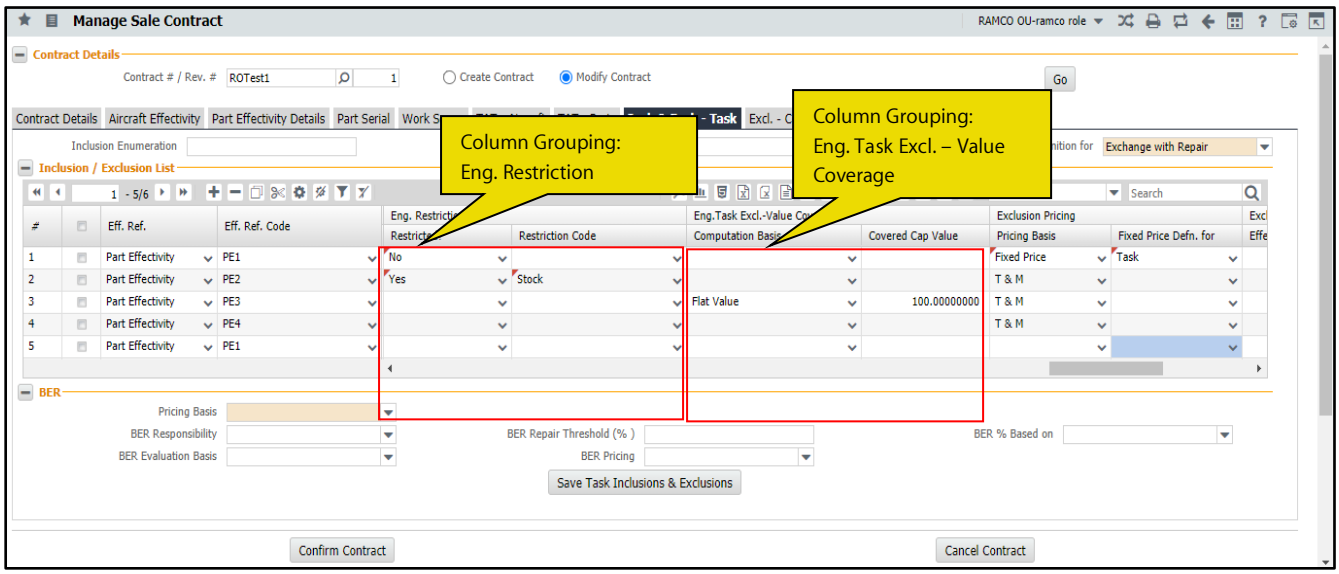


Exhibit 4:

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


Manage Sale Contract
Contract Details
Contract # / Rev. #
ROTest1
Create Contract
Modify Contract
Go
Contract Details
Aircraft Effectivity
Part Effectivity Details
Part Serial
Inclusion Enumeration
Inclusion / Exclusion List
Exchange with Repair
Column Grouping:
Eng. Restriction
Column Grouping:
Eng. Task Excl. – Value Coverage
Eff. Ref.
Eff. Ref. Code
Restriction Code
Computation Basis
Covered Cap Value
Exclusion Pricing
Pricing Basis
Fixed Price Defn. for
Part Effectivity
PE1
PE2
PE3
PE4
No
Yes
Stock
Flat Value
100.00000000
Fixed Price
T & M
Task
BER
Pricing Basis
BER Responsibility
BER Evaluation Basis
BER Repair Threshold (%)
BER Pricing
BER % Based on
Save Task Inclusions & Exclusions
Confirm Contract
Cancel Contract

Ability to set SLA and Core return rules against a Customer or Sale Contract

Reference: APRP-303

Background

Any organization which provides services to Customer would tend to hold Service Level Agreements in order to agree upon certain standard duration of response. The standard duration would indicate the period within which the requested service would require to be either acknowledged or provided and the organization would track their compliance to the agreed term on periodic basis. There could be similar agreements for any returns that the customer would need to do.

Thus, there is a need to be able to set these service level agreements and return policy which should be used to periodically check the organization's compliance.

Change Details

A new activity **Manage SLA/Core Return Rules** has been under the **Customer** business component. Master Screen **Manage SLA/Core Return Rules** has been developed in order to set various rules that are agreed upon in the contract. The SLA & Core return Rules can be set only for the following types of services, currently: Sourcing, Acknowledgement Returns.

Two tabs have been defined in this screen to enhance the usability of the screen. 'Standard Duration' tab allows the user to set various rules against Customer #, Contract #, Sale types, various Part and Request based entities. All these rules can be set for the Start and End Dates for the respective transaction and the corresponding time for the set transactions can be defined in 'Standard Duration' field in the tab.

In the 'Compliance Terms' tab, user can set the Compliance % similar to how the Standard Duration Terms were set. The compliance terms can be set for the rules that have been defined in 'Standard Duration' tab. Export and Import options have been provided in order to upload bulk data at once.

This screen can also be accessed directly from the **Sale Contract**, **Edit Customer Main Info.** And View **Customer Record** screens as well.

Exhibit 1:
New Activity Added – Manage SLA/Core Returns

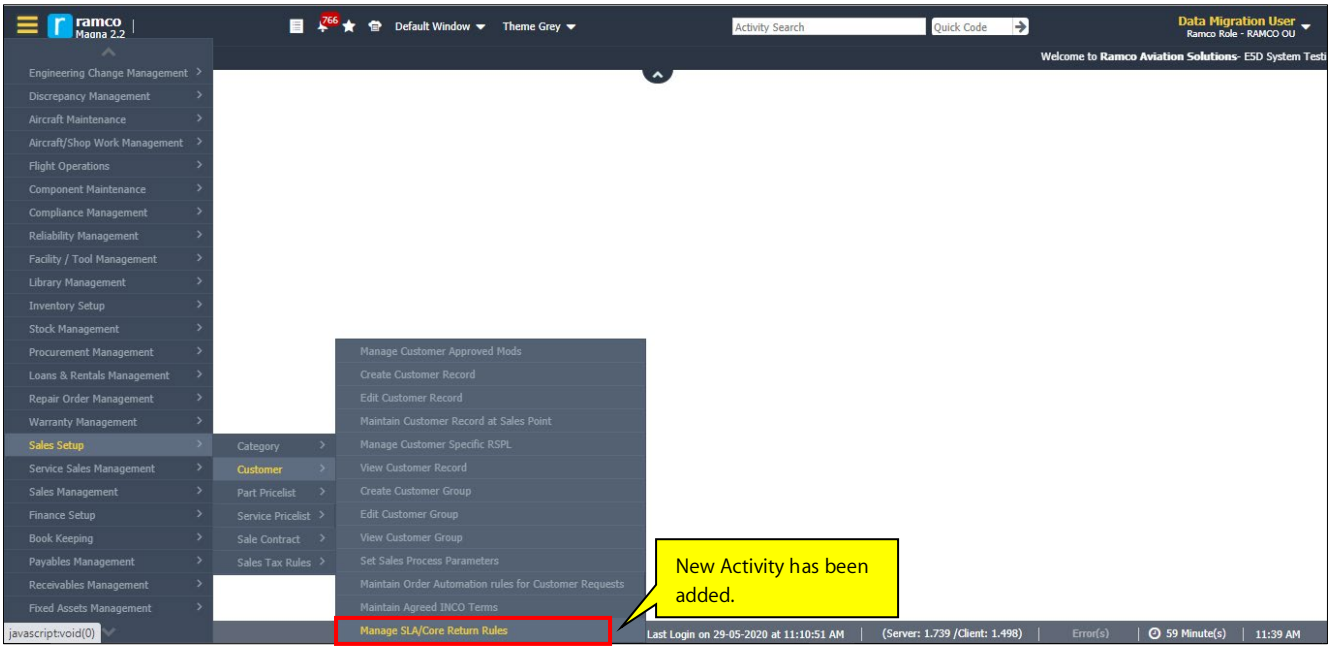


Exhibit 2:

Manage SLA/Core Returns Rule screen

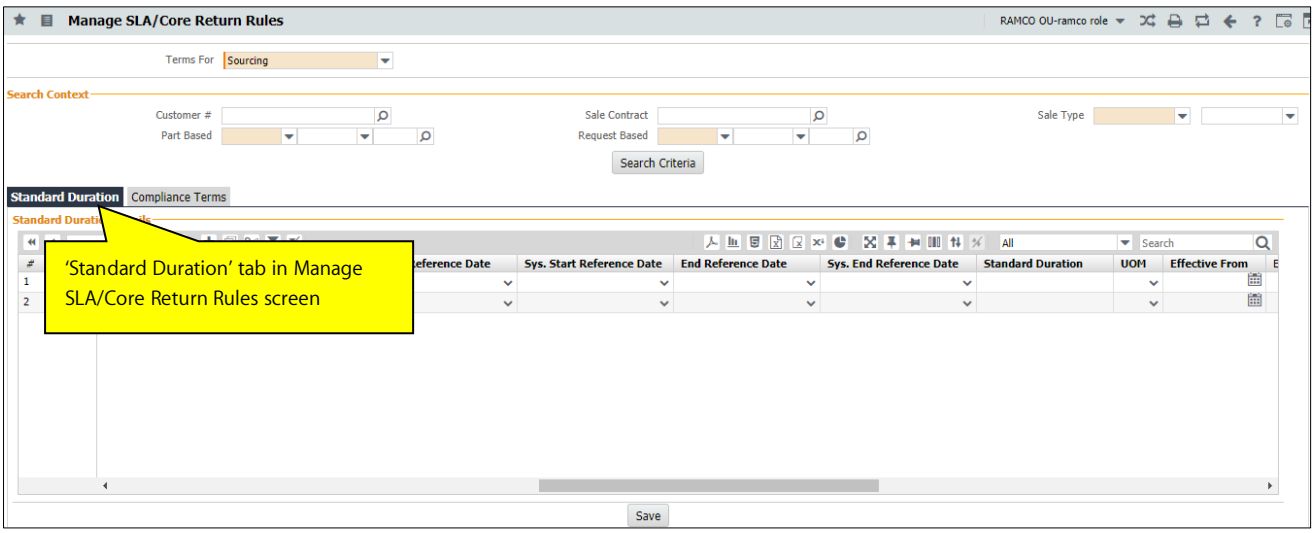


Exhibit 3:

Manage SLA/Core Returns Rule screen

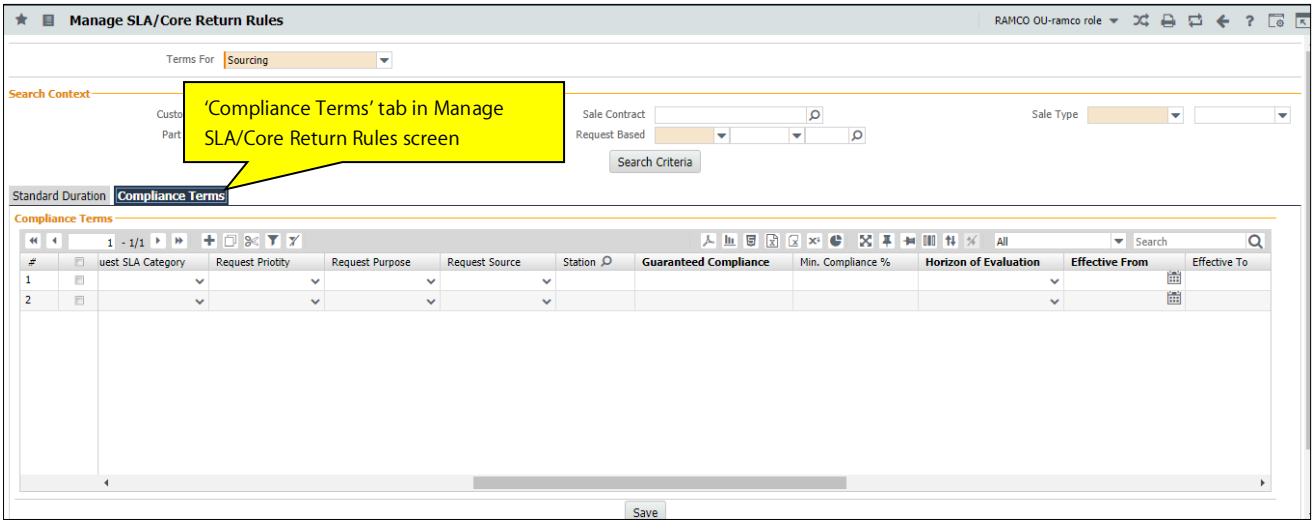


Exhibit 4:

Manage Sale Contract screen

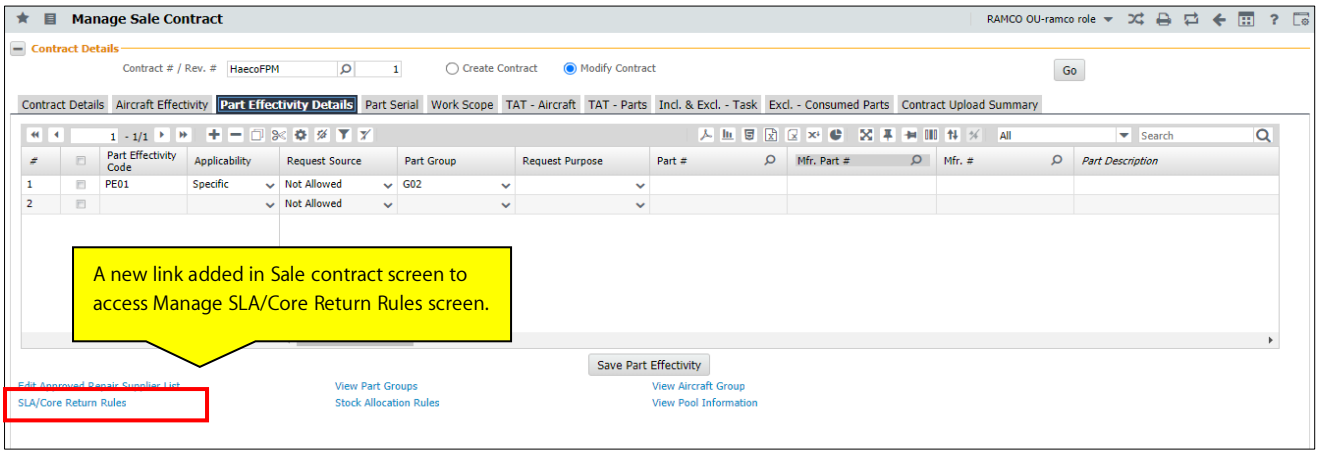


Exhibit 5:

Edit Customer Main Information screen

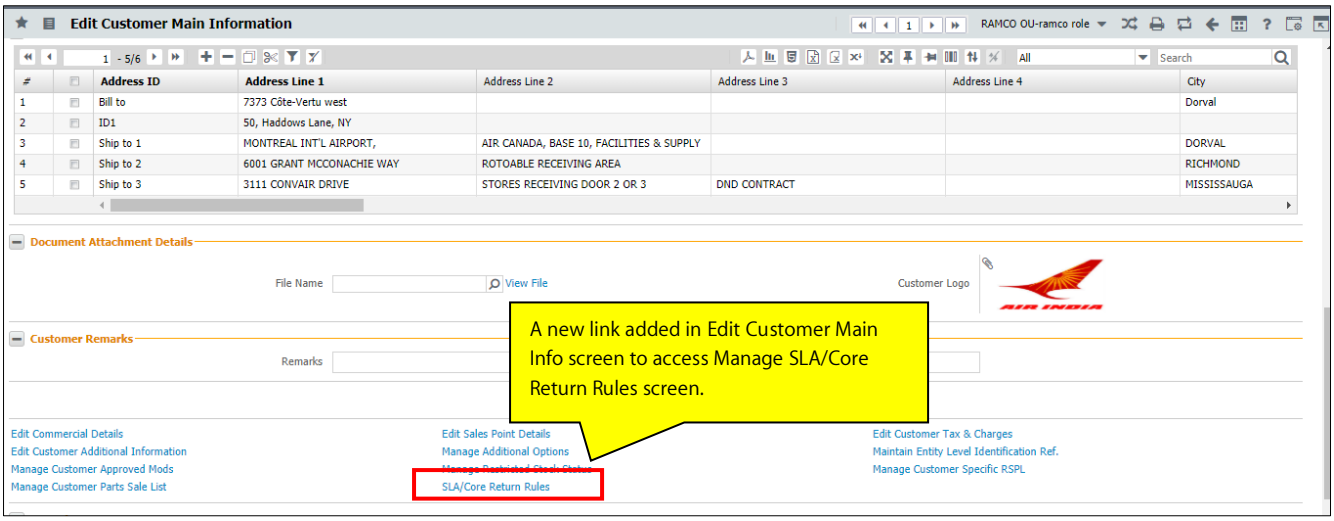
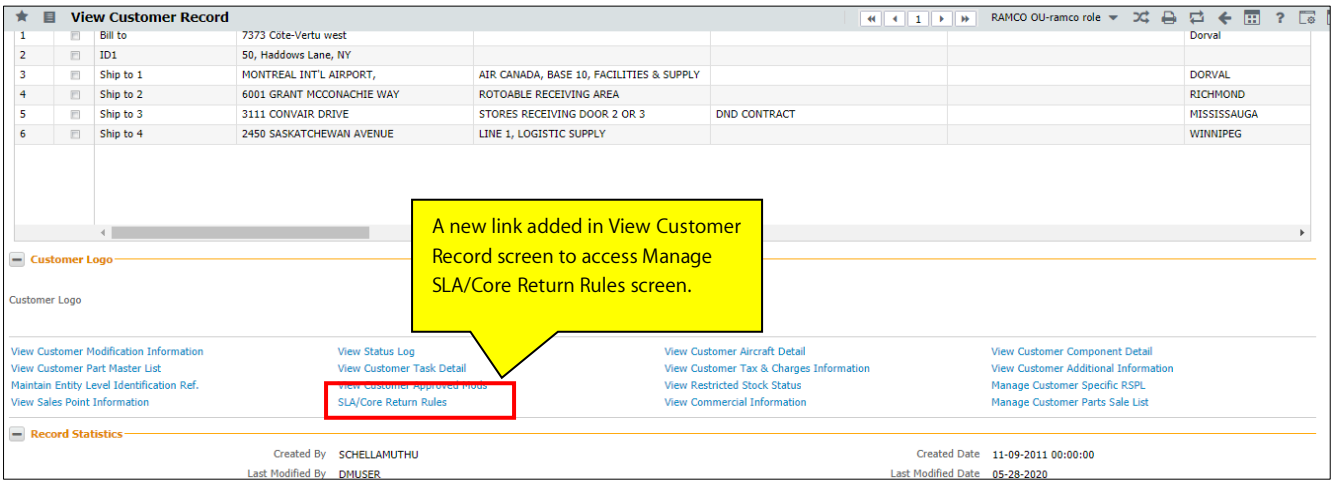


Exhibit 6:

View Customer Record screen



Ability to define the NTE Scrap and Repair Rates in contract for Engine modules or Sub-assemblies

Reference: APRP-342

Background

Engine MROs provide not-to-exceed limits on total price of a job which include scrap replacement of engine compressor/turbine blades upto a certain limit. This is called the 'allowed scrap rate' which is contractually agreed upon.

The requirement is to have a provision to define the NTE limits for scrap to be set in the Contract and thereby include only the given percentage of repl. as inclusion and the remaining charged as exclusions.

Change Details

A new link **NTE Scrap/Repair Rates for Engine Blades** has been added in the **Edit Pricing and Invoicing Details** screen of 'NTE Pricing & Exclusions' tab under **Sales Setup** business process > **Sale Contract** business component > **Manage Sale Contract** activity. (Exhibit-1)

The following details can be provided for defining the NTE Scrap/Repair Rates for Engine' in the newly added screen.

- Effectivity Level: Loads with 'Part Effectivity' and 'Blank'. The Scrap rate definitions can be provided at each Part Effectivity level. The Parts defined against the Effectivity Line should be of type - Engine.
- Effectivity Code: The Part Effectivity Code of the contract against which the NTE scrap/repair rates are being defined.
- Engine Part #: The Part # of type – engine against the part Effectivity Code selected.
- Blade Part #: The Blade Part # available in the Engine Part # for which the NTE scrap/repair is being defined.
- Blade Part Group: The Part Group of the Blade Part # available in the Engine Part # for which the NTE scrap/repair is being defined.
- Repair Limit (in %): The Repair Limit in percentage for the blade part.
- Scrap Limit (in %): The Scrap Limit in percentage for the blade part.
- Notes

Note:

*The new screen **NTE Scrap/Repair Rates for Engine Blades** will be launched and displayed only against the Sale Contract with Object Effectivity: 'Parts' and at least one definition in the 'Part Effectivity' tab should have a part with Component Type as 'Engine'.*

Definitions in this screen is not mandatory, hence will not affect Contract from changing to Fresh status.

Note that if the Sale contract is on Aircraft / a Part which does not belong to the Component Type 'Engine', then NTE scrap rate definitions will not be allowed to be defined.

Exhibit 1:

Edit Pricing and Invoicing Details screen in the **Sale Contract** business component

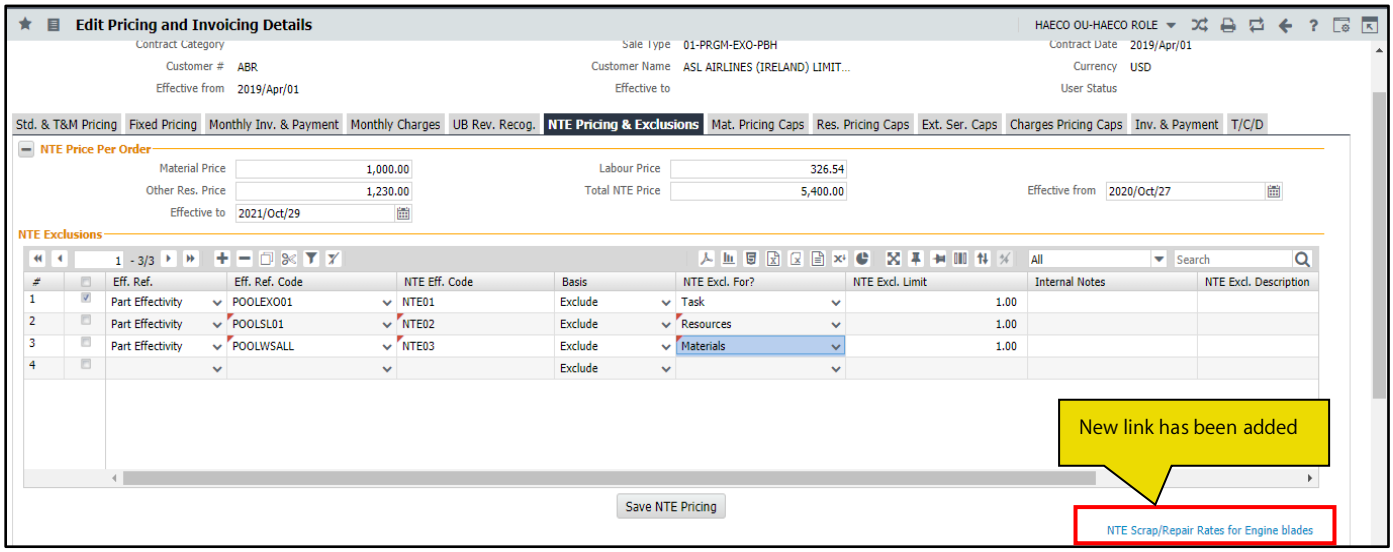
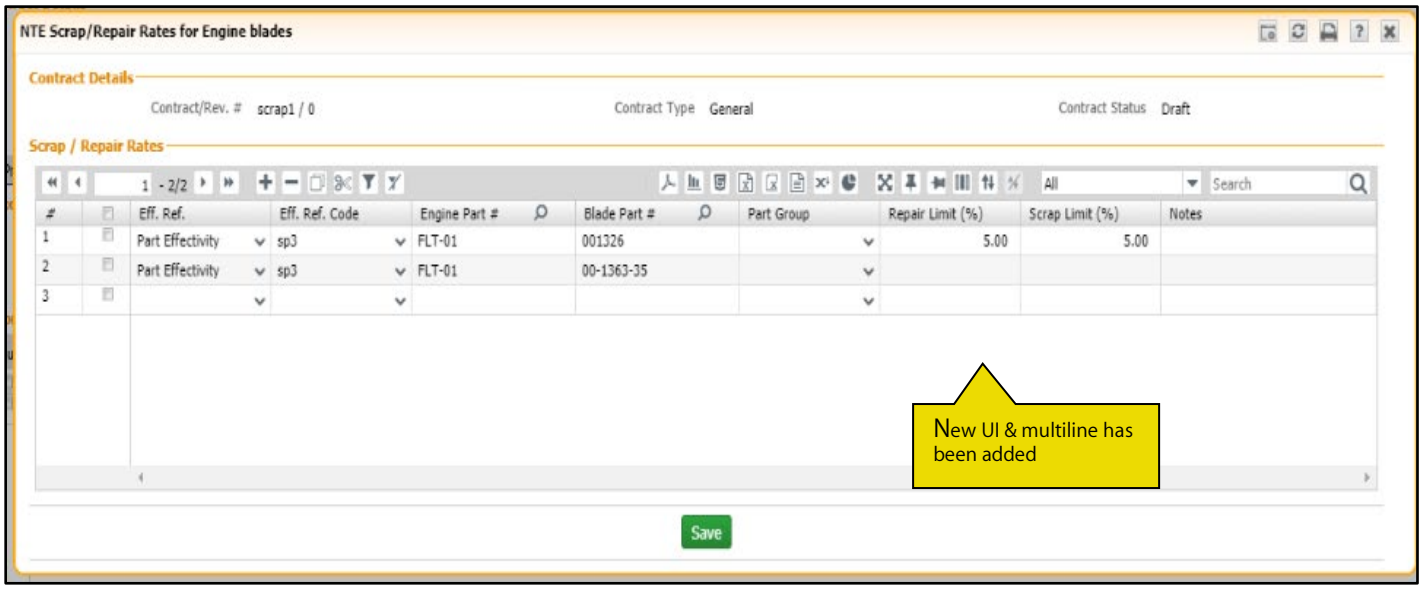


Exhibit 2:

NTE Scrap / Repair Rates for Engine blades screen



Ability to set Contract Exclusions based on Engineering Document attributes

Reference: APRP-340

Background

In most of the business scenarios in component repair (Performed both internally as well as externally), jobs can be either included/excluded from the agreed pricing depending upon certain engineering attributes of tasks/work scope being performed on those particular components.

For example:

- A repair job should be classified as included, if the repair is done for a SB bulletin performed within three months of SB release date and the same job should be considered as exclusion if performed after certain period of time post SB release date.
- In ITM business model, repair jobs performed on components for Engineering Order tasks, for agreed quantity of parts serviced for those EO tasks will be charged to the customers on a certain price basis, after which the repair jobs would be non-chargeable.

Thus, the requirement is to have a provision to define the inclusion and exclusion definitions in Sale Contract based on certain engineering order/task attributes and evaluate and price the engineering tasks based on these inclusions and exclusion definitions.

Change Details

- A new parameter is added in **Sales Setup > Customer > Set Sales Process Parameter** screen to specify whether the Eng. Doc. scope evaluation based on Advanced Exclusion rules is 'Required' or 'Not Required'. Another parameter is added in same screen to specify whether the restricted parts from the Engineering document should be excluded based on restriction code.**(Exhibit-1)**

  1. Display Parameters for : MRO Sales
     Parameter for : Advanced Excl. rules for EO
     Process Parameter : Eng. Doc. scope evaluation based on Advanced Exclusion rules
     Permitted Value : '0' for Not Required, '1' for Required
     If the above parameter is set as:
     - Required : The column grouping mentioned below will be visible in 'Incl. & Excl. – Task' tab in 'Manage Sale Contract'
       a. Eng.Doc attributes
       b. Eng.Doc.Eff.Date Ref.
       c. Eng. Reference
       d. Eng. Restrictions
       e. Eng. Task exclusions - value coverage
     - Not Required: The above column grouping would be hided which suits business models for which exclusion definitions are not applicable based on engineering attributes.

  2. Display Parameters for : MRO Sales
     Parameter for : Advanced Excl. rules for EO

Process Parameter : Restriction Code based on which Engineering Changes on Components to be excluded

Permitted Value : Specify "0" for "Not Applicable" or a valid Restriction Code

If the above parameter is set as

- Not Applicable: 'Restriction Code' column in 'Incl. & Excl. – task' tab would be loaded with blank.
- Valid Restriction code: 'Restriction Code' column in 'Incl. & Excl. – task' tab would be loaded with value defined against the parameter.

3. New Columns have been added in the 'Excl. & Incl. – Task' tab in the **Contract Main Info.** Page under **Sales Setup > Sale Contract > Manage Sale Contract** screen to define the exclusions and inclusions definitions for tasks based on engineering attributes. All the columns under this tab are grouped under multiple sections depending on the type of information being provided.

- **Eng. Doc. Attributes** column grouping contains the columns related to engineering document to define exclusion definitions. The following are the newly added controls under this group **(Exhibit-2)** :
    a. Applicability: Loaded with values as Blank, Component, Engine, Aircraft
    b. Eng. Class: Loaded with values as Blank, Replacement, Retro fitment, Task Improvisation, Task schedule related and Informative
    c. Mandatory: Indicates 'Yes' or 'No' against Engineering Document
    d. Reliability: Loaded with values as Blank, Yes and No.
    e. Certifying Authority: Loaded with all the Active 'Certifying Authority' under **Maintain Certifying Authority** screen under **Logistics Common** Master Component.
    f. User defined controls - to be loaded with all the 'Active' quick codes defined under the resp. quick code type in the **Edit Quick Codes** screen under **Maintenance Change Request** component.

- **Eng.Doc. Eff.Date Ref.** column grouping contains the columns to define the specific period based exclusions for engineering document. The following are the newly added controls under this group (**Exhibit -3**) :
    a. Date Incl.: Loaded with values 'Blank', 'Less than or equal', 'Less than', 'Greater than or equal' and 'Greater than'
    b. Incl. Period: Indicates the actual value of time period.
    c. UOM: Loaded with the values 'Blank' and 'Months'

- **Eng. Reference** column grouping contains the columns to define exclusions only for Covered Qty. agreed with the customers. The following are the newly added controls under this group (**Exhibit-3** :

    a. Eng. Doc #: Indicates the Engineering Document #

b. Part #: Indicates the Part in Engineering Document
c. Covered Qty. : Indicates the Qty. which is covered with a particular pricing basis
d. Pricing – Covered Qty. : Loaded with values 'Blank', 'Non-Billable', 'T&M' and 'Fixed Price'
e. Rem. from A/c Reg. #: Indicates the A/c Reg. # in Engineering Document
f. Rem. from A/c Model: Indicates the A/c Model # in Engineering Document

- Eng. Restrictions column grouping contains the columns to define part restrictions based on restriction codes. The following are the newly added controls under this group(Exihibit-4) :
  a. Restriction: Loaded with values 'Yes', 'No' and blank.
  b. Restriction Code: Loaded with 'blank' and restriction code set in Set Sales Process Parameters

- Eng. Task Excl. - Value coverage contains the columns to define cap values for engineering tasks if applicable. The following are the newly added controls under this group(Exhibit-4) :
  a. Computation Basis: Loaded with values as 'Percentage based' , 'Flat Value' and 'Blank'
  b. Covered Cap Value: Indicates the covered cap value.

Note:

Exclusion Definition against the above mentioned column, attributes can be defined only for Contract with Object Applicability: 'Parts'. Eng. Doc. Attributes based inclusion/exclusion definitions for an 'Aircraft' contract

Exhibit 1:

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

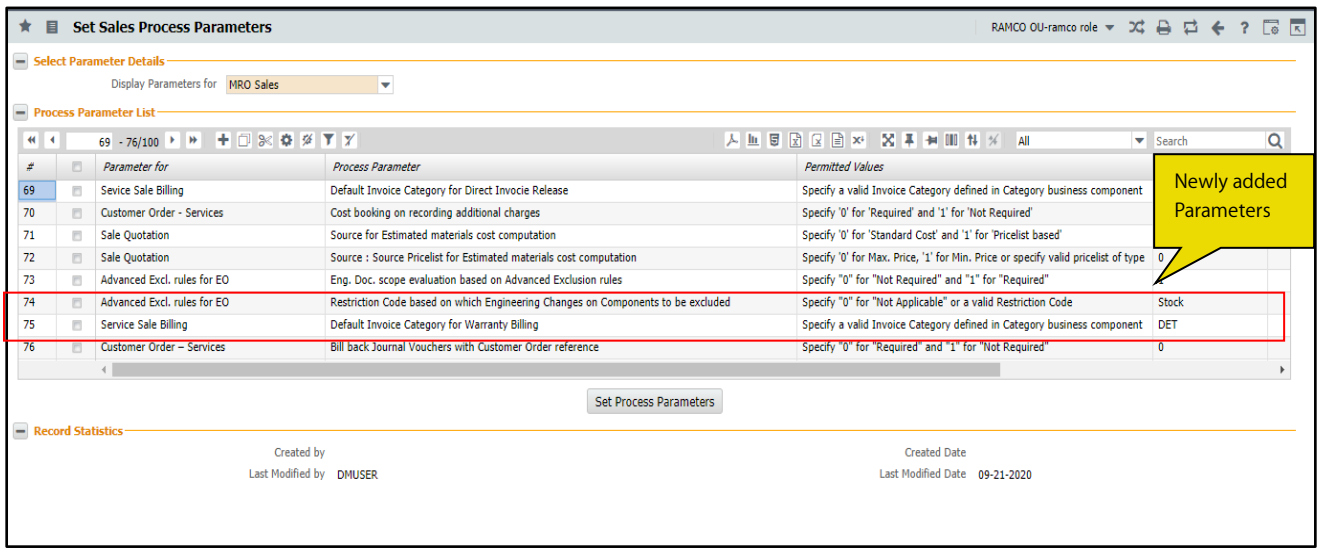


Exhibit 2:

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

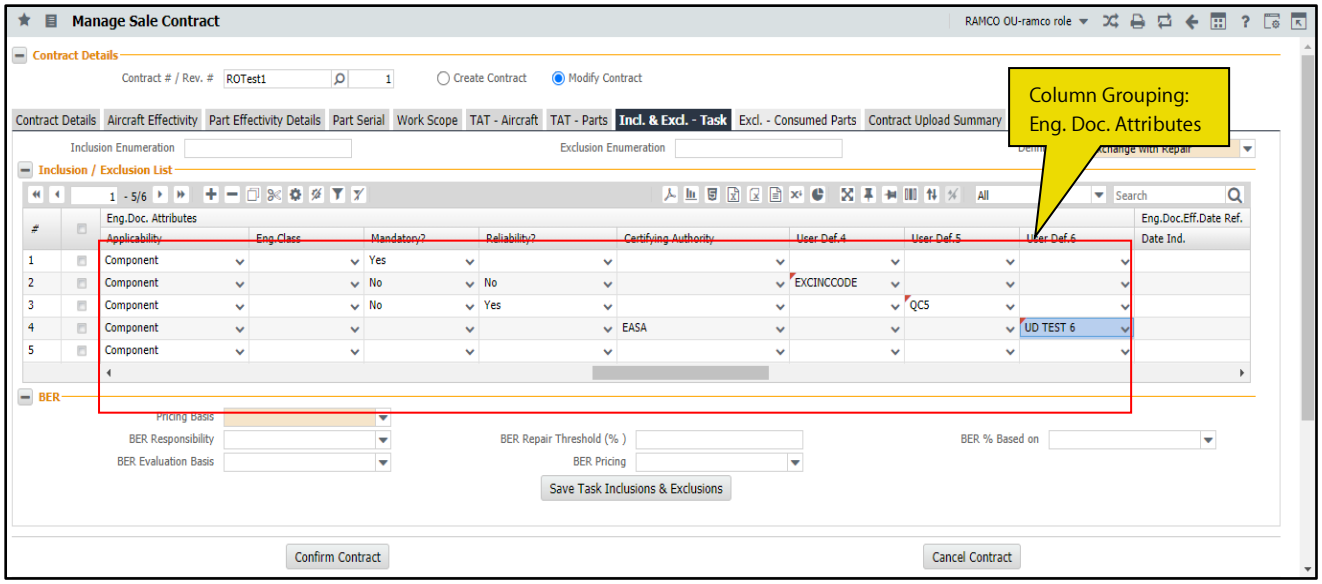


Exhibit 3:

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

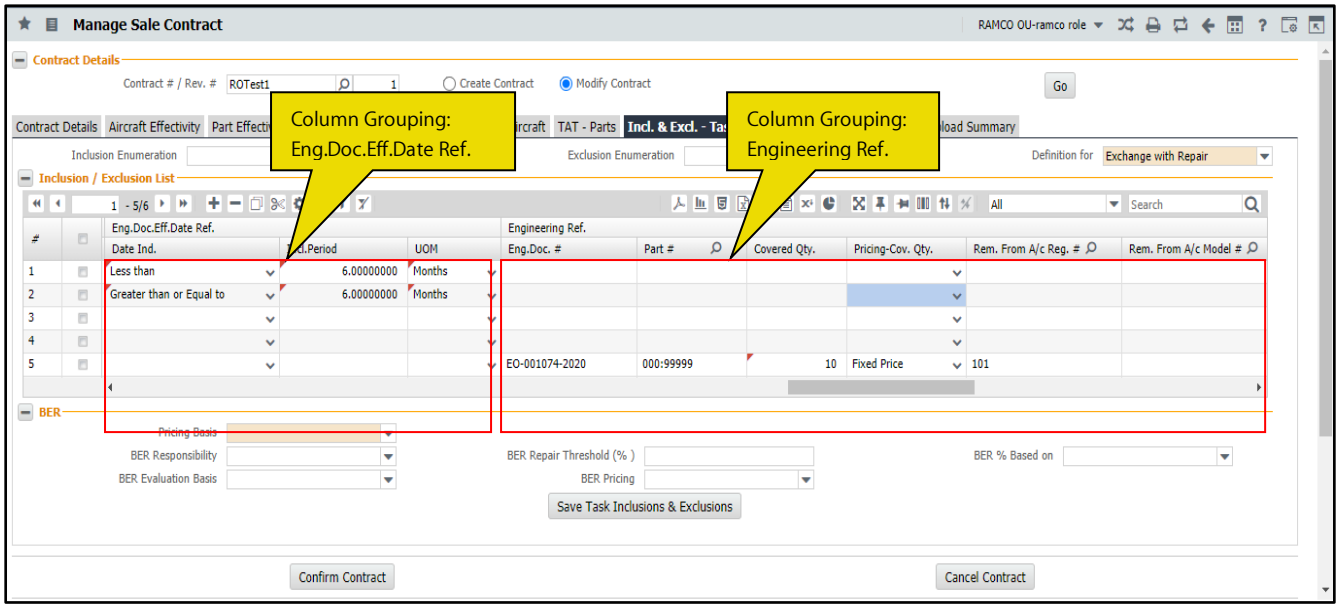
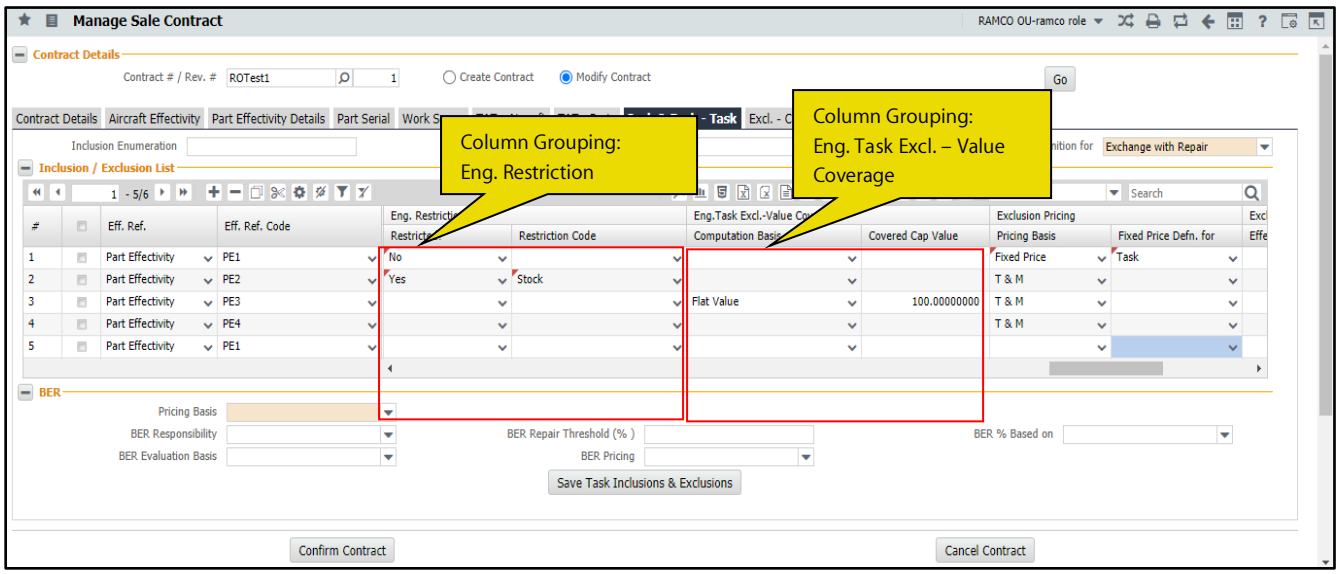


Exhibit 4:

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


Manage Sale Contract
Contract Details
Contract # / Rev. #
ROTest1
Create Contract
Modify Contract
Go
Contract Details
Aircraft Effectivity
Part Effectivity Details
Part Serial
Inclusion Enumeration
Inclusion / Exclusion List
Column Grouping:
Eng. Restriction
Column Grouping:
Eng. Task Excl. – Value Coverage
Exchange with Repair
Search
Eff. Ref.
Eff. Ref. Code
Restriction Code
Computation Basis
Covered Cap Value
Exclusion Pricing
Pricing Basis
Fixed Price Defn. for
Part Effectivity
PE1
PE2
PE3
PE4
No
Yes
Stock
Flat Value
100.00000000
Fixed Price
T & M
Task
BER
Pricing Basis
BER Responsibility
BER Evaluation Basis
BER Repair Threshold (%)
BER Pricing
BER % Based on
Save Task Inclusions & Exclusions
Confirm Contract
Cancel Contract

Ability to automatically update approved Impact Assessment details to Contract for Eng. Doc. Exclusions on EO release

Reference: APRP-1140

Background

Business Models like Inventory Technical Management services get their MOD upgrades done for the components which they serve to their customers through an external repair vendor. MOD tasks are obtained as Service Bulletins from respective OEM either as a mandatory task or a task which improves the reliability of the component. Thus, to perform these MOD tasks on the parts which ITM operators serve to their customers, they would get in touch with the respective customers and agree to charge them for certain quantity of part to perform these tasks and beyond the agreed quantity, these MOD tasks charge would be incurred by ITM-Services and provided free of cost to customers.

In Ramco, Service Bulletins which are released are incorporated as Maintenance Change Request, in turn to Impact Assessment document where the details agreed quantity for parts against each part-task combination will be updated and sent to customer for approval with respect to Customer Contract.
Once the customer has approved these Impact Assessment documents, the details will be updated to Engineering Document for execution.

This requirement is to update these engineering attributes automatically to Sale Contract without any manual interventions on release of Engineering Document.

Change Details

New parameters are added in '**Operational Parameters**' tab of **Edit Terms of Execution** screen under **Manage Sale Contract** activity in the **Sale Contract** business component.

a. Category : Commercials
   Element : Eng. Change Exclusions
   Description : EO exclusions billing based on Engineering Impact Assessment
   Permitted Values : '0' for 'Required', '1' for 'Not Required'

- If the above set option is set as:
  - **Required**: Then the details from EO document will be updated as new Definition in 'Incl. & Excl. – Task' tab of respective sale contract with the new line having the details in 'Engineering Ref.' column grouping from Impact assessment document and Engineering Document on the event of 'Release Eng. Doc.'
  - **Not Required**: Then EO attributes will not updated to sale contract in the event of 'Release Eng. Doc'.

Note: Engineering Attributes to the 'Engineering Ref.' column grouping will be updated only when above parameter is set as 'Required' and also the parameter 'Eng.Doc. Scope evaluation based on Advanced Exclusion rules'

*is set as 'Required' in the **Set Sales Process Parameter** screen under **Customer** business component. Engineering Attributes will not be updated if any one of the above parameter is set as 'Not Required.'*

b. Category : Commercials
Element : Eng. Change Exclusions
Description : Revise Contract to auto apply EO exclusions based on Engineering Impact Assessment
Permitted Values : '0' for 'Yes, in Fresh Status' , '1' for 'Yes, In Approved Status' , '2' for 'No' and '3' for 'Not Applicable'

- If the above set option is set as
  - **Yes, in Fresh Status**: Then the EO Attributes from the Engineering Document would be updated with respect to document status of Sale Contract. On EO release, if the status of Sale Contract is:
    I. **'Draft' / 'Fresh' / 'Returned'**, Engineering Doc. Attributes from EO document will be directly updated in the 'Inclusion and Exclusion' tab without generating a new revision.
    II. **'Confirmed'**, the existing revision for identified contract will be changed as 'Fresh' status and then Engineering Document Attributes from EO document will be updated.
    III. **'Approved'**, a new revision for identified contract will be generated in 'Fresh' status and against the new revision which is generated in 'Fresh' status, Engineering Doc. Attributes from EO document will be updated.

  - **Yes, in Approved Status**: The EO Attributes from the Engineering Document would be updated with respect to document status of Sale Contract. On EO Release, if the status of Sale Contract is:
    I. **'Draft' / 'Fresh' / 'Returned'**, Engineering Doc Attributes from EO document will be directly updated in 'Inclusion and Exclusion' tab without generating a new revision.
    II. **'Confirmed'**, the revision for identified contract will be changed as 'Fresh' status and then Engineering Document Attributes from EO document is updated.
    III. **'Approved'**, a new revision for identified contract will be generated in 'Approved' status and against the new revision which is generated in Approved status, Engineering Document Attributes from EO document will be updated.

  - **No**: Engineering Document Attributes from EO document are updated directly in 'Inclusion and Exclusion' tab in the same revision of Sale Contract document on release of EO.
  - **Not Applicable:** Engineering Document Attributes will not be updated in identified

Sale Contract on EO release. This option can be only set if the parameter 'EO exclusions billing based on Engineering Impact Assessment' is set as 'Not required'.

Note:

1. *Fixed Pricing tab in **Sale Contract** will be automatically updated with a fixed price value against a new line inserted with the Inclusion or Exclusion definition reference, if the Eng. Doc. Attributes is updated with 'Pricing Cov. Qty.' as 'Fixed Price' in 'Incl. & Excl. – Task' tab.*
2. *On Release of EO, if the identified Sale Contract is in 'Closed/Cancelled' Status, then Engineering Doc. Attributes are not updated to the contract.*
3. *Modifications are restricted for the lines inserted in 'Incl. & Excl. –Task' tab of Sale Contract through Eng. Doc. Release.*
4. *When a line in Impact Assessment/ Engineering Document is modified and document is re-released, the line initially updated in the Sale Contract will not be updated with the modified values. Only the New lines inserted in the Impact Assessment will be updated to Sale Contract on re-release.*

c. Category : Commercials
Element : Eng. Change Exclusions
Description : Restrict billing for EO excl. on exchange cores based on the source quantity issued with MOD upgrades
Permitted Values : Enter '0' for 'Yes' and 1' for 'No'

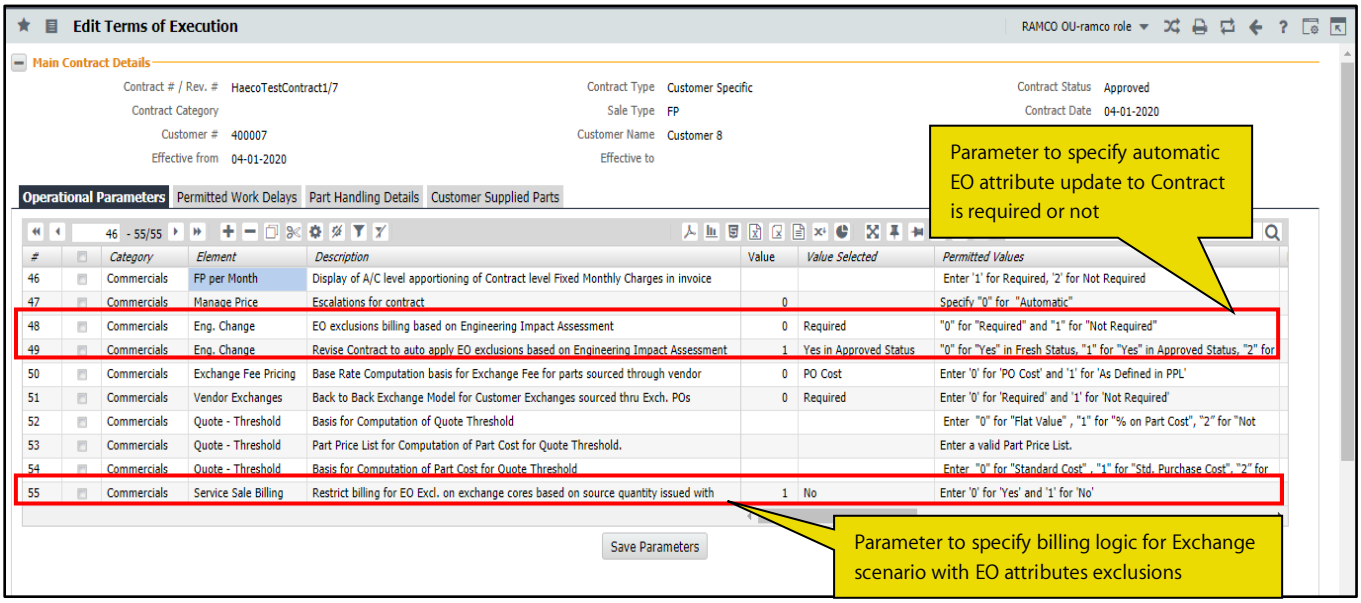
- If the above set option is set as:
  - **Yes :** Then the exclusions based billing for exchange scenario will be applicable only if:
    I. The Issued Qty. of Post MOD in source part against that particular exclusion line Ref. is greater or equal to the Complied Qty. which is repaired as core unit.
    II. The Complied Qty. is lesser than or equal to Covered Qty. in Sale Contract against the Inclusion / Exclusion line reference.

Note: If any one of above condition fails, the job will be billed under the Part Effectivity pricing basis.

- **No**: Then the exclusions based billing for exchanges will be applicable when the Complied Qty. is lesser than or equal to Covered Qty. in Sale Contract against the Inclusion/Exclusion line reference. If the condition is not satisfied, the job would be billed under Part Effectivity pricing basis.

Exhibit 1:

The **Edit Terms of Execution** screen in the **Sale Contract** business component



Ability to evaluate Contract for an Order based on Request Attributes viz. Request Source & Request Purpose

Reference: APRP-1240

Background

Currently the Customer Request for 'Repair/Exchange' is set up in to a Customer Order once a contract is identified and evaluated for the part/service request. The attributes of the request that are currently being used for contract evaluation are: Request Date, Customer #, Part Details, and Aircraft Details only.
The requirement has come up that certain other attributes of request also participate in evaluating the contract before a Customer Order is set up.
Hence this enhancement brings the improvement in **Sale Contract** to identify these request attributes to define valid part effectivity definitions and evaluate the Contract for an Order Based on these additional attributes.

Change Details

New Controls in Sale Contract:

- New Controls 'Request Source' and 'Request Purpose' have been added in the multiline of the Part Effectivity tab in the Manage Sale Contract activity under **Sale Contract** screen. (**Exhibit-1**)

- The 'Request Source' combo is loaded with all active category codes defined for the Category Type 'Source Doc. Type' in the **Manage Category Codes** activity of the **Category** business component under the **Sales Setup** business process.

- The 'Request Purpose' combo is loaded with all the active category codes as defined for the Category Type 'Request Purpose' in the **Manage Category Codes** activity of the **Category** business component under the **Sales Setup** business process.

Contract Evaluation Logic:

- Contract Evaluation logic has been enhanced to consider 'Request Source' and Request Purpose' as additional attributes along with the existing ones during generation of Customer Order from Customer Request.

Points to be noted:

1. If the part effectivity in Sale Contract is defined with both 'Request Source' and 'Request Purpose' and the Customer Request also carries these attributes, then the evaluation of contract will be done based on the defined attributes.

   ✎ *Note: These new two attributes are in addition to the existing logic and attributes used for evaluation.*

2. If the part effectivity in Sale Contract is not defined using 'Request Source' and 'Request Purpose' and the Customer Request screen does not carry these attributes, evaluation of contract will be done

based on the existing functionality, that is, evaluation will happen with the other attributes as per the existing functionality.

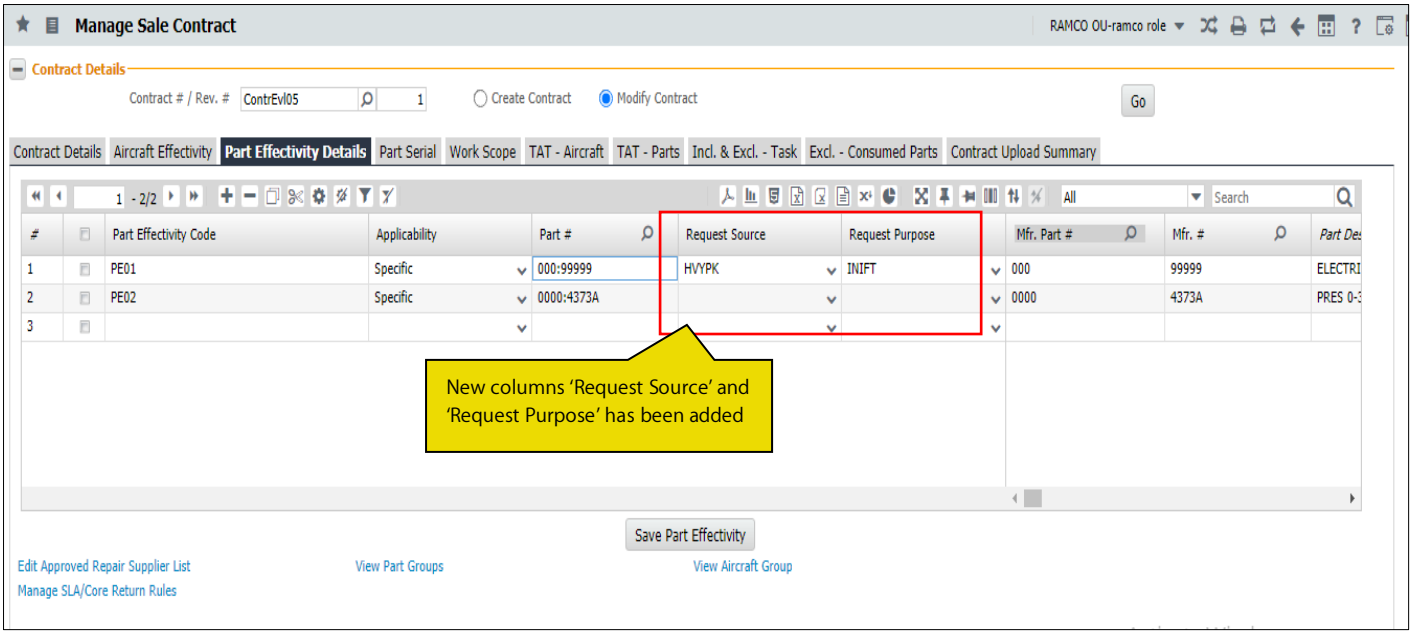
3. If the part effectivity in Sale Contract is not defined using 'Request source' and 'Request Purpose' but the Customer Request carries these attributes, evaluation of contract will be done based on the other attributes and the applicable contract will be evaluated.

4. If the part effectivity in Sale Contract is defined with both 'Request Source' and 'Request Purpose' but the Customer Request screen does not carry these attributes, evaluation of contract will be done based on the defined attributes but contract will not be eligible.

> *Note: While generating Customer Order manually/ from **Goods Inward** screen/ **Route Unserviceable Parts/Components**, during contract evaluation, 'Request Source' and 'Request Purpose' is considered as 'Blank' and contract evaluation will be done based on other existing attributes.*

Exhibit 1:

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



WHAT'S NEW IN SERVICE SALES MANAGEMENT?

Ability to evaluate Eng. Doc. Based tasks in Shop work order and visibility in Quote & Inv. Release

Reference: APRP-1141

Background

Business scenarios in component repair (typically that of repair on In-flight entertainment systems), jobs can be either included / excluded / included with cap from the agreed pricing depending upon certain attributes like time period of SB/AD Release Date, Mandatory, Reliability and so on.

Thus provision is given to facilitate task level definitions in the **Manage Sale Contract** which will be applied for final billing of an EO task in **Manage Sale Quotation** and **Manage Invoice Release** screen, if the task is added in Work Order with the above mentioned Engineering Attributes.

For example:

- A repair job must be classified as included; if the repair is done for a SB bulletin performed within 3 months of SB release date.
- Same repair job must be considered as Included but with a cap limit; if the repair is done for a SB bulletin performed within 6 months of SB release date.
- A repair job must be classified as excluded; if the repair is done for a SB bulletin if performed after 6 months of SB release date.

Change Details

1. For addressing the direct entry in Task Master, the following controls are introduced:
   - Eng. Doc. Eff. Date: It represents the effectivity period of the particular document.
   - Mandatory?: This is to ensure whether the task is mandatory.
   - Reliability Related?: This is to ensure whether the Task is related to any reliability improvement.
   - Eng. Doc. Class: This is to have different classes of document same as in engineering document.
   - Along with the above controls some additional user defined combo controls are introduced. i.e, User defined- 4-6 .(**Exhibit -1**)
   - The above controls are added in **Create Task Information**, **Edit Task Information**, **Maintain Activated Task** and **View Task**.

2. The 'Customer Order #' in the multiline of 'Select Customer Order – Services' is made as data hyperlink control to launch the Manage Sale Quotation screen instead of selecting a document from the multiline and navigating through a link.(**Exhibit -2**)

3. New columns are introduced in the 'Ref. Info tab' of the **Manage Sale Quotation** screen and 'Reg. Billing Info.' tab of the **Manage Invoice Release** screen for the visibility of task level capping charges for EO task. columns introduced in the screen are as follows: (**Exhibit -3,4,5,6**)

- EO Task? 'Yes' or 'No'. Indicates whether the task added in the SWO is EO task.
- EO Attributes: Displays the Engineering attributes of the task by concatenating using '|' separator.
- EO Doc #: Displays the Engineering Order Document # based on which the EO task is inherited into the Work Order.
- Covered Cap per Unit – FP task: Displays the covered cap value per unit for the task from the contract definitions, if the task runs under fixed price. Or else the column will be left 'Blank'.
- Adj. FP per unit: Displays the adjusted value per unit after the cap value is applied, if the task runs under fixed price. Or else the column will be 'Blank'.
- T&M Price per unit: Displays the T&M price for the task per unit which is obtained from the 'Material' and 'Resources' tab for that particular task for single Qty. Column will be blank for the task which runs under 'Fixed price'
- Covered Cap per Unit - T&M task: Displays the covered cap value per unit for the task from the contract definitions, if the task runs under T&M. Or else the column will be 'Blank'.
- Adj. T&M Price per unit: Displays the adjusted value per unit after the cap value is applied, if the task runs under T&M. Or else the column will be 'Blank'.
- T&M Extd. Price: Displays the total T&M price for the task after cap, for all the parts in the Work order. Column will be blank for the task which runs under 'Fixed Price'

Exhibit 1:

The **Create Task Information** screen in the **Maintenance Task** business component

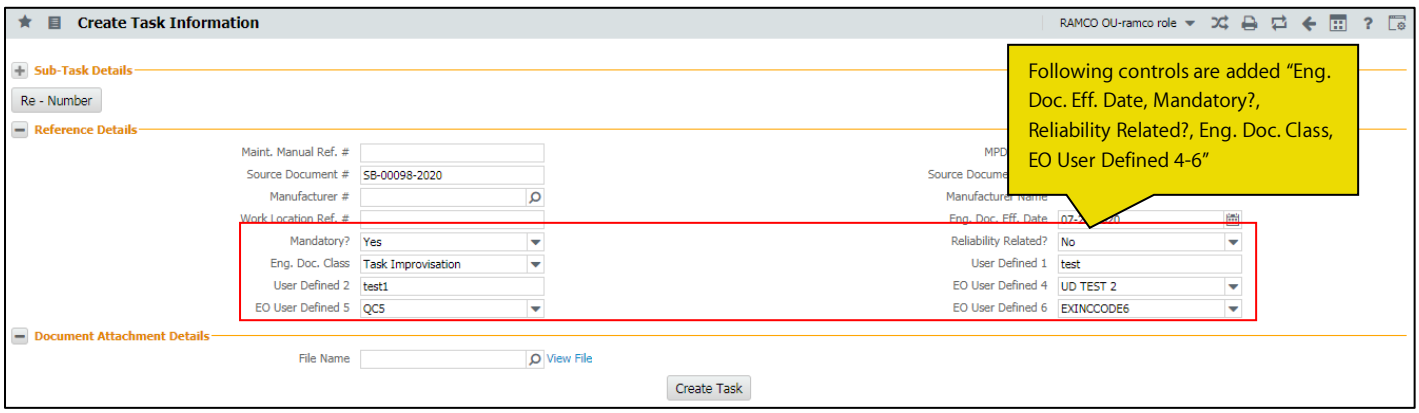


Exhibit 2:

The **Manage Sale Quotation** Screen

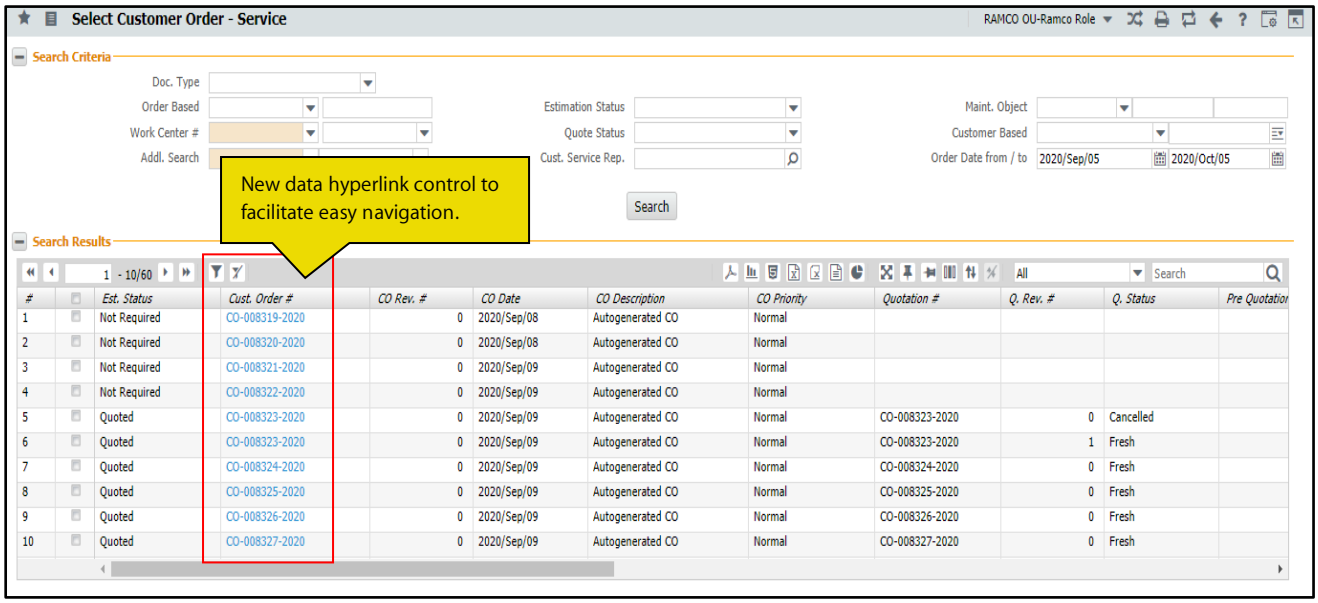


Exhibit 3:

The **Manage Sale Quotation** screen in the **Sale Quotation** business component

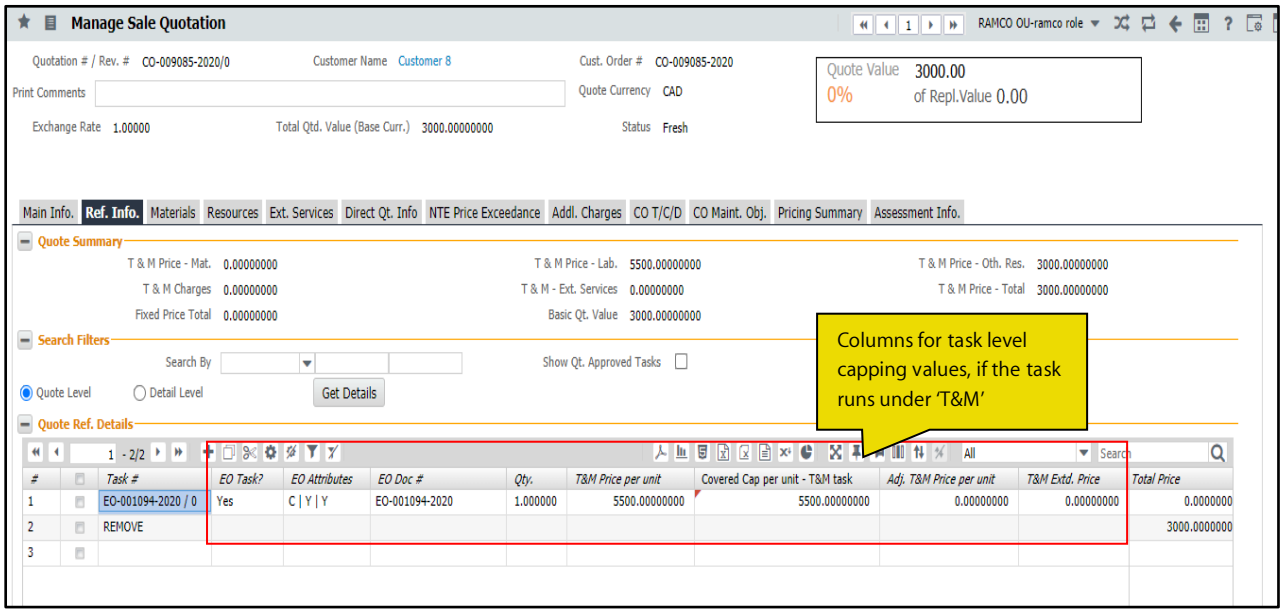


Exhibit 4:

The **Manage Sale Quotation** screen in **Sale Quotation** business component

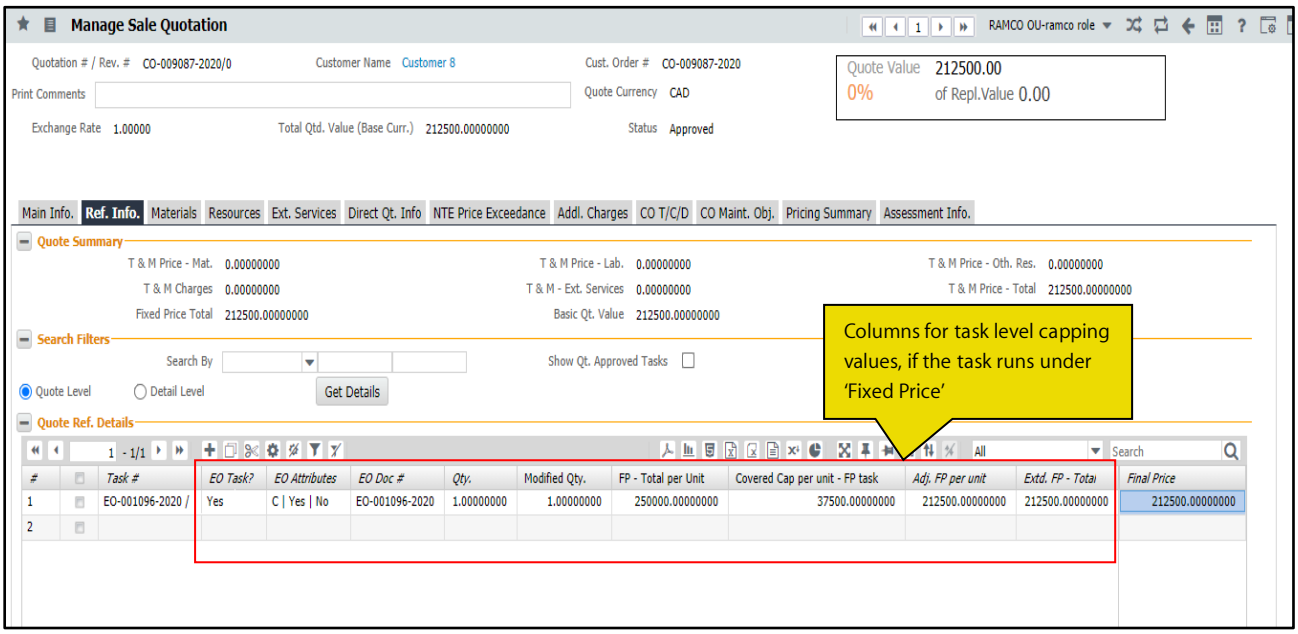


Exhibit 5:

The **Manage Invoice Release** Screen in the **Service Sale Billing** business component

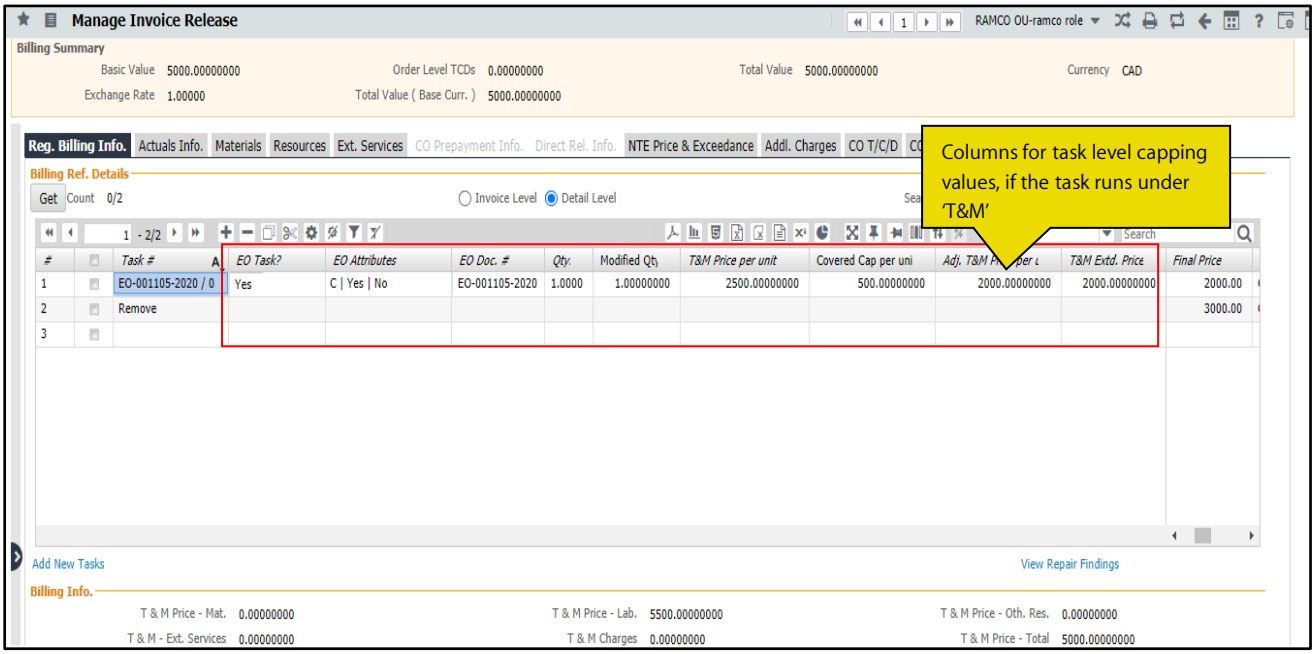
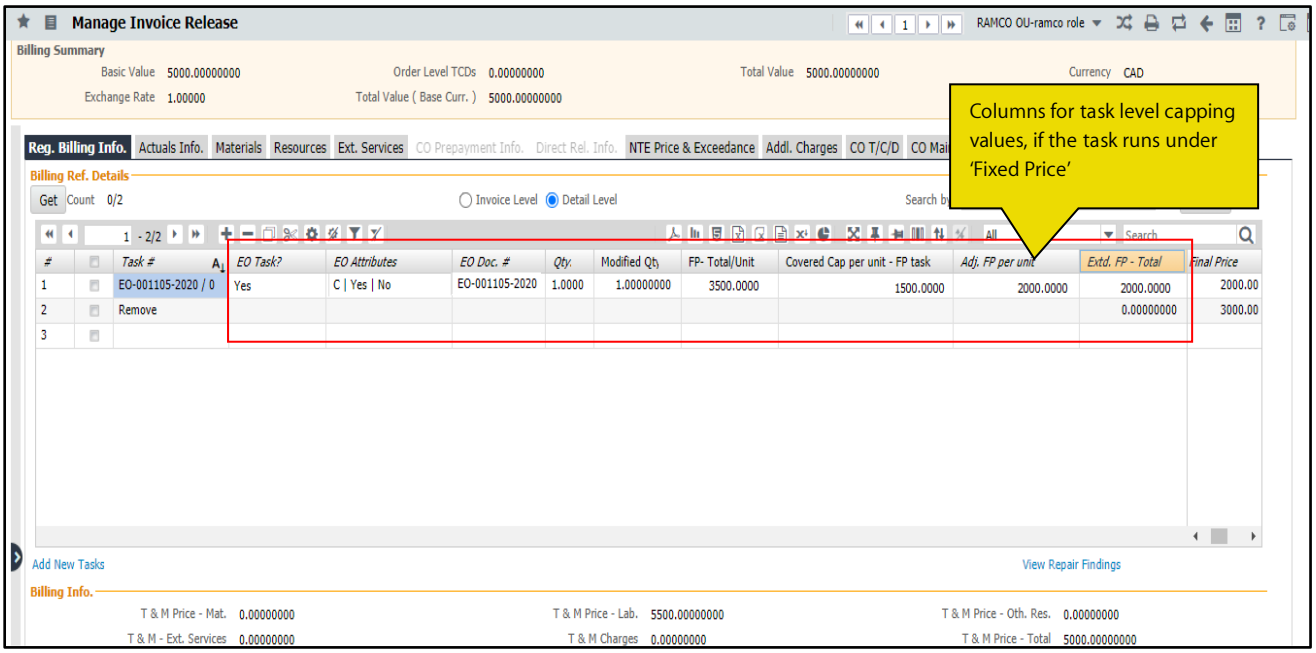


Exhibit 6:

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


Manage Invoice Release
Billing Summary
Basic Value 5000.00000000
Order Level TCDs 0.00000000
Total Value 5000.00000000
Currency CAD
Exchange Rate 1.00000
Total Value (Base Curr.) 5000.00000000
Columns for task level capping values, if the task runs under 'Fixed Price'
Reg. Billing Info.
Actuals Info.
Materials
Resources
Ext. Services
CO Prepayment Info.
Direct Rel. Info.
NTE Price & Exceedance
Addl. Charges
CO T/C/D
Billing Ref. Details
Get
Count 0/2
Invoice Level
Detail Level
| Task # | EO Task? | EO Attributes | EO Doc. # | Qty. | Modified Qty | FP- Total/Unit | Covered Cap per unit - FP task | Adj. FP per unit | Extd. FP - Total | Final Price
1 | EO-001105-2020 / 0 | Yes | C | Yes | No | EO-001105-2020 | 1.0000 | 1.00000000 | 3500.0000 | 1500.0000 | 2000.0000 | 2000.0000 | 2000.00
2 | Remove | 0.00000000 | 3000.00
3
Add New Tasks
View Repair Findings
Billing Info.
T & M Price - Mat. 0.00000000
T & M Price - Lab. 5500.00000000
T & M Price - Oth. Res. 0.00000000
T & M - Ext. Services 0.00000000
T & M Charges 0.00000000
T & M Price - Total 5000.00000000

Ability to evaluate Engineering Document based tasks in Repair Order for Inclusion / Exclusion and visibility of pricing in Invoice Release

Reference: APRP-607

Background

Business Models like Inventory Technical Management services get their MOD upgrades done for the components which they serve to their customers through an external repair vendor. MOD tasks are obtained as Service Bulletins from respective OEM either as a Mandatory task or a task which improves the reliability of the component. Thus to perform these MOD tasks on the parts which ITM operators serve to their customers, they would get in touch with the respective customers and agree to charge them for certain quantity of part to perform these tasks and beyond the agreed quantity to perform these MOD tasks, charge would be incurred by ITM- Services.

Thus task level Inclusions and Exclusions evaluation for Repair Order is enabled through an option setting. Workscope level Information for the tasks added in Repair Order can be seen in the Invoice Release with respective pricing basis based on Inclusion/Exclusion or Include with Cap definitions in new pop-up screen based on that option setting.

Change Details

- New parameter is added in **Set Sales Process Parameter** screen under **Customer** component in the **Sales Setup**' business process. This is added as one time option setting at organization level.**(Exhibit-1)**

  Parameter Level : Organization Level
  Business process : Sales Setup
  Parameter for : RO Workscope Billing
  Process Parameter : Exclusion definition for Repair Order
  Permitted Values : '0' for 'RO level' and '1' for 'RO Work scope level'

  - If the above set option is set as '**RO level**', then the exclusion attribute definitions are matched only at document level and not at each task added in Repair Order document.
  - If the above set option is set as '**RO Workscope level**', then the exclusion attribute definitions are matched for each task added in Repair Order document rather than matching the attributes at document level.

- New columns have been added in 'Ext. Ser. Pricing Details' multiline under the 'Ext. Services' tab in **Manage Invoice Release** screen under the **Service Sale Billing** business component. **(Exhibit-2)**
  - OOS Exists?: If any one task which is added in the Repair Order is evaluated as out of scope based on the Inclusion or Exclusion definitions in the sale contracts then, 'Task OOS?' is displayed as 'Yes'. If no such tasks exist, control will be displayed as 'No'.
  - Workscope Info.: If the Work scope level details are available in Repair Order, then 'Workscope Info.' column will be displayed as 'Yes', else it will display 'No'

- A new screen **Manage Ext. Service Task Pricing Details** is launched when the Workscope level information is available for a repair order document. On click of the link 'Yes' in Ext. Ser. Pricing Details multiline, this pop-up will be launched. Some of the important controls in pop-up screen are (**Exhibit-3 & 4**).
    - **Total Qty:** Displays the total quantity of parts against the selected Repair order / Repair Receipt line.
    - **Repair Qty:** Displays the quantity of parts repaired against the selected Repair order / Repair Receipt line.
    - **BER Qty:** Displays the quantity of parts for which condition of the maintenance object is beyond economic repair against the selected Repair order / Repair Receipt line.
    - **Task #:** Indicates the task which is added in Repair Order against the Part.
    - **Eng. Task?:** Displays 'Yes' or 'No' depending on whether the task added in the Repair Order is Engineering Order task or not.
    - **Basic Rate (CO Curr.):** Displays the base rate of the part or the task performed for maintenance / repair, in the customer order currency.
    - **Unit Mark-up:** The value of mark-up/gain for each repaired/serviced part.
    - **Unit Price:** Displays the price of the task with the inclusion of unit markup price.
    - **Eng. Task Cov. Cap:** Displays whether Covered Cap is 'Flat Value' or 'Percentage Based' column will be blank if no cap definitions are identified against task.
    - **Cov. Cap %:** Displays the % of Covered cap to be applied on unit price. Applicable only for the line identified as Eng. Task as 'Yes' with Pricing Basis as 'T&M'.
    - **Covered Unit Price:** The amount of the covered cap value which is not billable for task as defined in the sale contract. (Either can be flat value or % value on unit price).
    - **Adjusted Unit Price:** Amount of Unit Price which is adjusted with Covered unit price value.
    - **Covered Qty:** Displays the quantity of the part that is not billable for the task.
    - **Billable Eng. Qty:** Indicates the part Qty. that needs to be billed for Eng. Task. Applicable only for the line identified as Eng. Task as 'Yes'.
    - **Extd. Basic Price:** The sum total of repair/service price for all parts (i.e) Adj. Unit Price * Qty.
    - **Eng. Doc. #:** Displays Eng. Order # against which the task got inherited.
    - **Eng. Doc. Eff. Date:** Displays the Eff. Date of Eng. Order # identified.
    - **Eng. Attributes:** Displays the attributes of identified Eng. Order by concatenating it.

Exhibit 1:

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

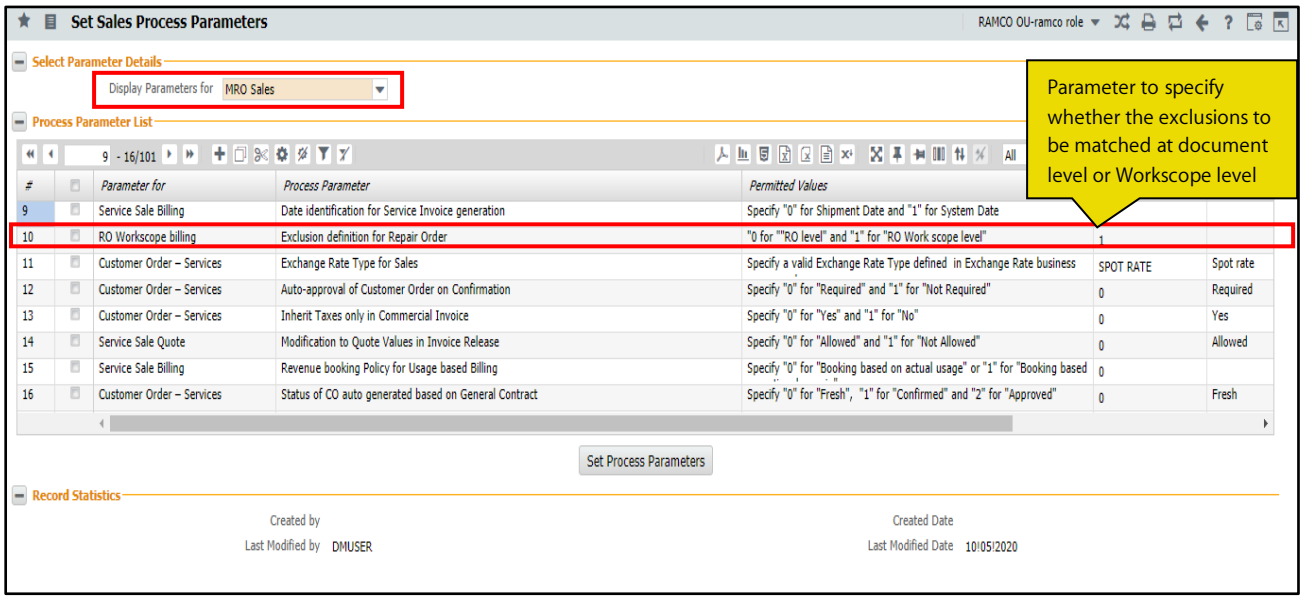


Exhibit 2:

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

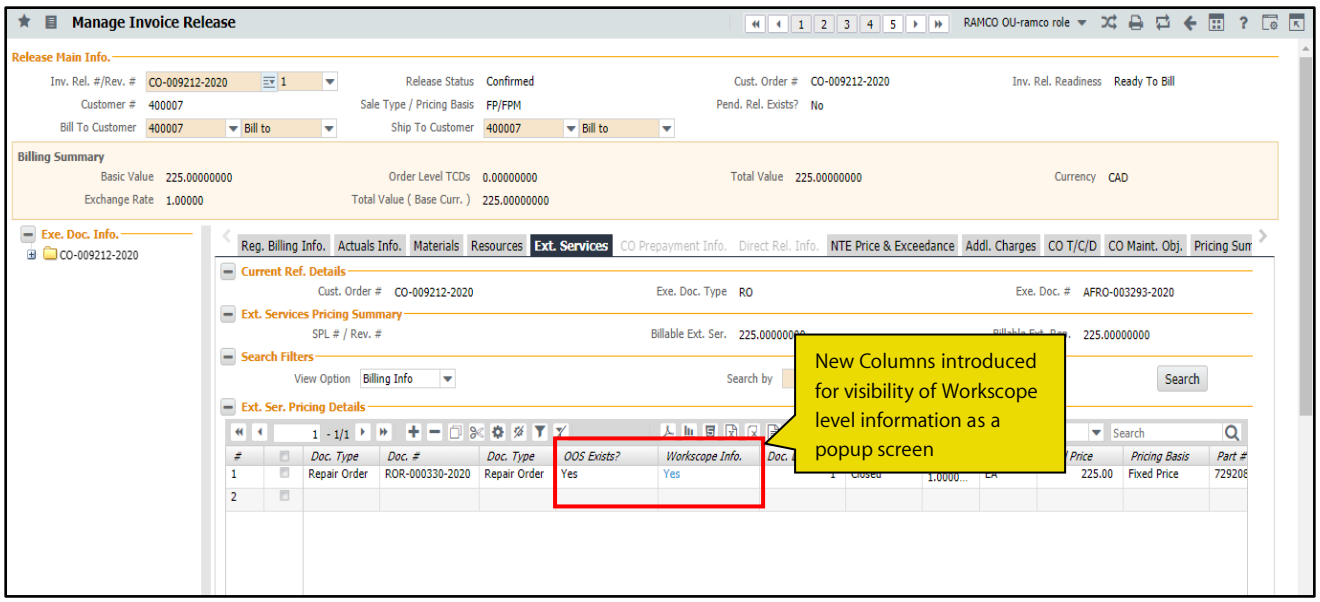


Exhibit 3:

The **Manage Ext. Service Task Pricing Details** screen

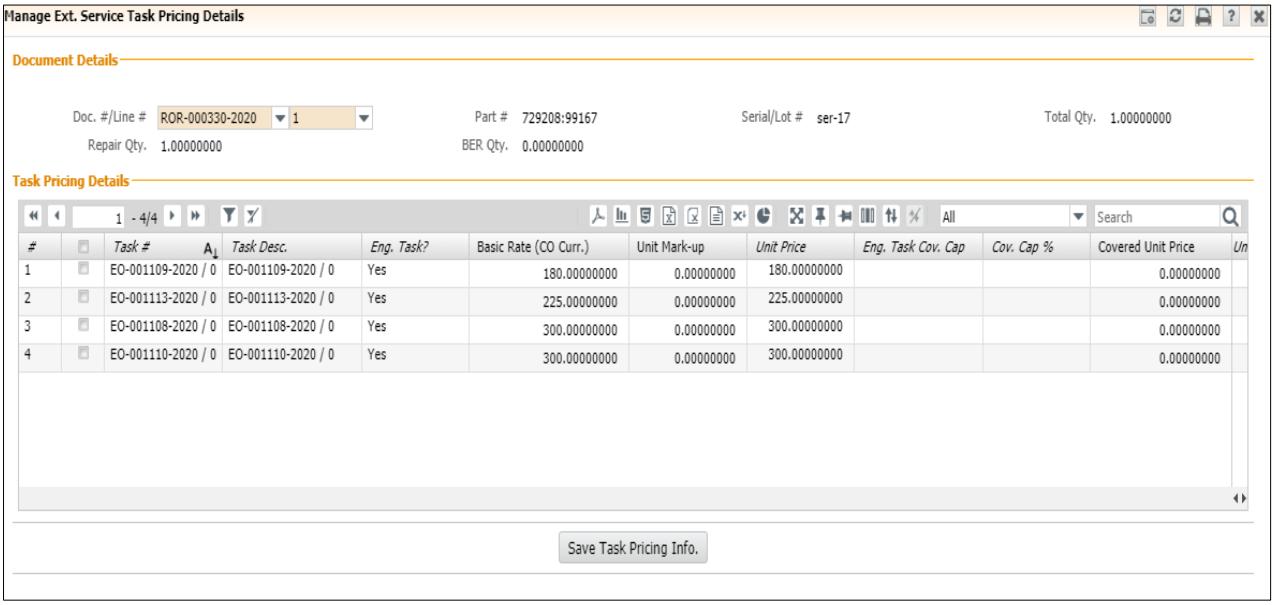
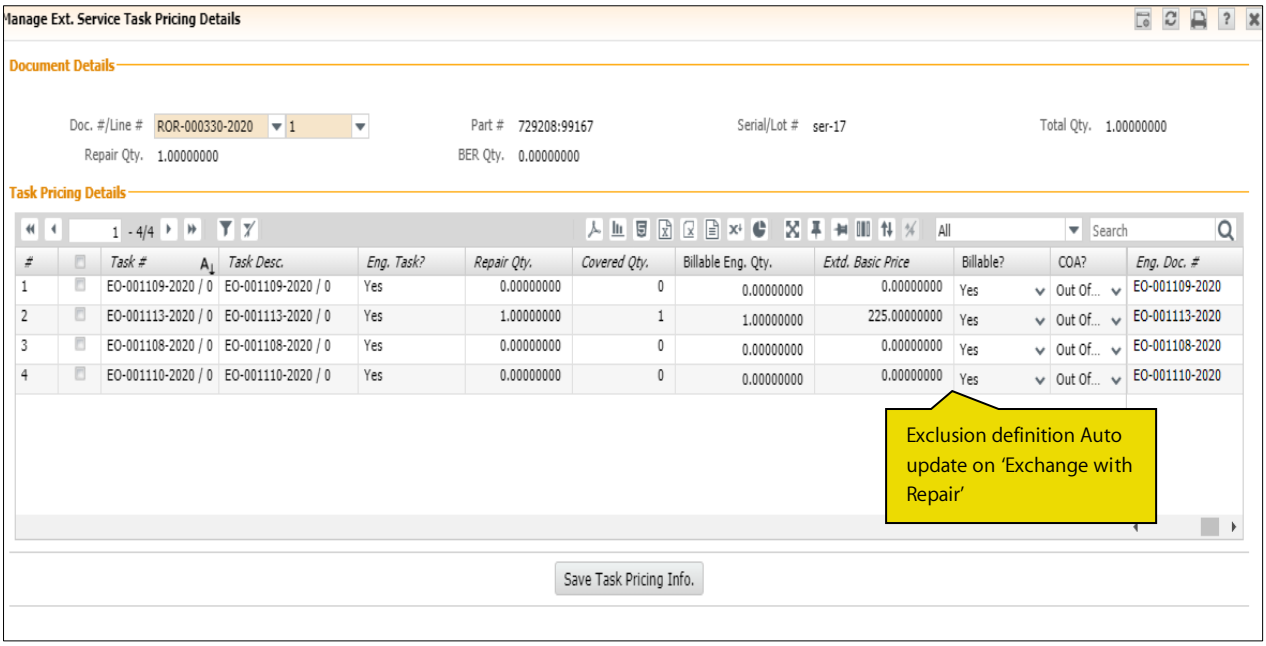


Exhibit 4:

The **Manage Ext. Service Task Pricing Details** Screen



Provision to generate the FPM/Usage based bills at the beginning of the month or end of the month/ Ability to raise monthly invoice releases for part contracts based on Aircraft age or FH

Reference: APRP-552, APRP -553

Background

For the inventory support services provided, ITMs have parts contracts with their customers and they adopt different pricing policies to charge their customers. The most prevalent ones are:

- Pricing based on the PBH rates and
- Fixed Price per Month

In case of such parts contracts, the billing is based on the agreed fleet for which the parts are supported and the Invoices raised for the jobs performed against each of the pricing basis are raised at different milestones. Currently, the pricing of aircraft jobs (under aircraft contract), based on the fixed price per month or usage of the aircraft has already been addressed in the application and the previous enhancements have introduced provision to define the Fixed Monthly Charges / PBH based billing rules for parts jobs and also provide a framework to define milestones at each Billing Element level within Usage Based / FPM Pricing Basis.

Now the business need is extension for earlier enhancement to raise and generate the monthly invoice releases for FPM and usage based charges at the beginning or end of horizon based on the aircraft age / FH or part FH depending of the pricing basis and billing element definitions in the **Sale Contract**.

Change Details

A. A new combo control '**UB pricing Defn for**' is added in the multiline of the '**Part Effectivity** tab' of the **Manage Sale Contract** activity under the **Sale Contract** component of **Sales Setup** BPC.**(Exhibit-1)**

> *Note: A value can be selected in this control only when the Pricing Basis selected against any Effectivity line ' Usage Based'*

- The combo control will be loaded with the values :
    a. Parts Usage: Indicates that the usage billing will be based on the usage of the parts. Contract should mandatorily have the specific part –serial level effectivity definitions to update/bill based on parts usage.
    b. Aircraft Usage: Indicates that the usage billing will be based on the usage of Aircrafts. The Removed from A/C Details will be considered in case of Contracts with Applicability: Parts. Contract should mandatorily have "Removed from A/C details" against all of the part effectivity lines.
    c. Blank: To be selected 'blank' in case if other pricing basis are selected.

Usage Update should be set as 'Consolidated' against all the billing elements defined against an effectivity line with 'UB Price Defn. for' as 'Aircraft Usage'. However both 'Individual and Consolidated' usage updates

can be set for the billing elements if the 'UB Price Defn. for' is set as 'Parts Usage' against the effectivity definition.

B. The below existing parameter under '**Operational Parameters**' tab of **Edit Terms of Execution** link under **Manage Sale Contract** activity of **Sale Contract** component of **Sales Setup** has been renamed.**(Exihibit-2)**

Existing Parameter: Setup of Monthly Invoice Release modified as

'Setup of Fixed Monthly Invoice Release'

Note:

This set option will now be used to define whether invoice generation should be manual or automatic in case of billing elements with 'Pricing Basis: Fixed Price per month'.

C. Two new parameters as mentioned below are added under '**Operational Parameters**' tab of **Edit Terms of Execution** link under **Manage Sale Contract** activity of **Sale Contract** component of **Sales Setup** .**(Exhibit-3)**

1. Category: Commercials
   Element: Billing Automation
   Description: Setup of Usage Based Invoice Release
   Permitted Value: '0' for Manual, '1' Automatic
   - If the above parameter is set as '0' Manual, then the Invoice release for all the billing elements with Pricing Basis: Usage Based; needs to be generated manually by the user.
   - If the above parameter is set as '1' Automatic, then the Invoice release for all the billing elements with Pricing Basis: Usage Based, will be automatically generated by the system once the milestone date is achieved.

Note:

This set option will be used to define whether invoice generation should be manual or automatic in case of billing elements with 'Pricing Basis: Usage Based'.

Invoice Release will not be automatically generated irrespective of the above parameter in case if the contract has at least one billing element with 'User Defined Parameter'.

2. Category : Commercials
   Element : Billing Automation
   Description : Grouping Policy for Automatic Usage Based Invoice Releases generation
   Permitted Value : '0' for One Release per Milestone, '1' One Release per Billing Element

   - If the above parameter is set as '0' One Release per Milestone, then system will generate one invoice release for all the billing elements with the same milestone in case if the invoice release generation is set as 'Automatic'.
   - If the above parameter is set as '1' One Release per Billing Element, then system will generate one invoice release for each billing element in case if the invoice release generation is set as 'Automatic'.

Note:

Based on the above set options and the definitions of billing elements (at contract level or billing element) Milestones will be populated and Invoice Releases will be generated manually or automatically.

D. A new combo control **'Billing Based on**' is added in the multiline under the **Monthly Inv. & Payment** tab in the 'Edit Pricing and Invoicing Details' link under **Manage Sale Contract** activity of the **Sale Contract** component under **Sales Setup** BPC.**(Exhibit-4)**

Note:

The Billing Based on combo control will be loaded with 'Calendar Year' and 'Financial Year'. The milestones will be set during calendar year or financial year for each of the billing elements based on this.

E. A new display only control **'Billing Element'** is added in the multiline under the **Process / View Generated Documents** tab of **Process Monthly Invoice Release** activity of the **Service Sale Billing** component of **Service Sale Management** BPC.**(Exhibit-5)**

Note:

The Billing Element for which the Invoice Release is generated will be displayed in this control. If the Invoice release has been generated for multiple billing elements, then this control will be shown as 'Multiple'.

Billing Milestones:

- Since the contract has been enhanced already to set Invoice and Payment definitions against individual Billing Elements for Monthly Invoice Release, there would now be multiple milestones for the same contract for various applicable Billing Elements
- The milestone can also be set common at a contract level and in such cases, provision has been given to update usage against aircraft or a combination of aircraft and Billing Element for usage based releases
- Selection of each milestone would retrieve the eligible billable Aircrafts / Parts for usage update/billing.

Sheet ID for Usage Based Billing:

- As already enabled in the contract, usage based billing for a Parts Contract can be based on either the Component's usage or the Aircraft's usage.
- Component's usage would mean the usage will have to be updated against individual Part/Serial # and Aircraft's usage would mean usage will have to be updated against Aircraft Registration number or at an Aircraft model/group level.
- Aircraft's usage can be updated in two levels:

1. If the usage of aircraft is constant for all applicable billing elements then the usage can be updated directly against the A/C Reg. #, (or),

2. If the usage of aircraft would vary for each applicable Billing Element based on billing period, then usage can be updated against individual Aircraft/Billing Element combination.

- All options of manual release generation, that is., one release per aircraft and one release per Billing Element are applicable to Parts Contract as well.

Monthly Invoice Release:

- Release generation remains the same as in Aircraft Contract.
- In addition to existing pricing, Contract is also enabled with Aircraft Qty. based pricing variations.
- In case of FPM billing, even though the applicability of contract is for parts, the billing parameter is still considered as 'Per month per Aircraft' and hence the release will carry the eligible aircrafts only.

Exhibit 1:

Part Effectivity Tab in **'Manage Sale Contract'** activity in **Sale Contract** business component

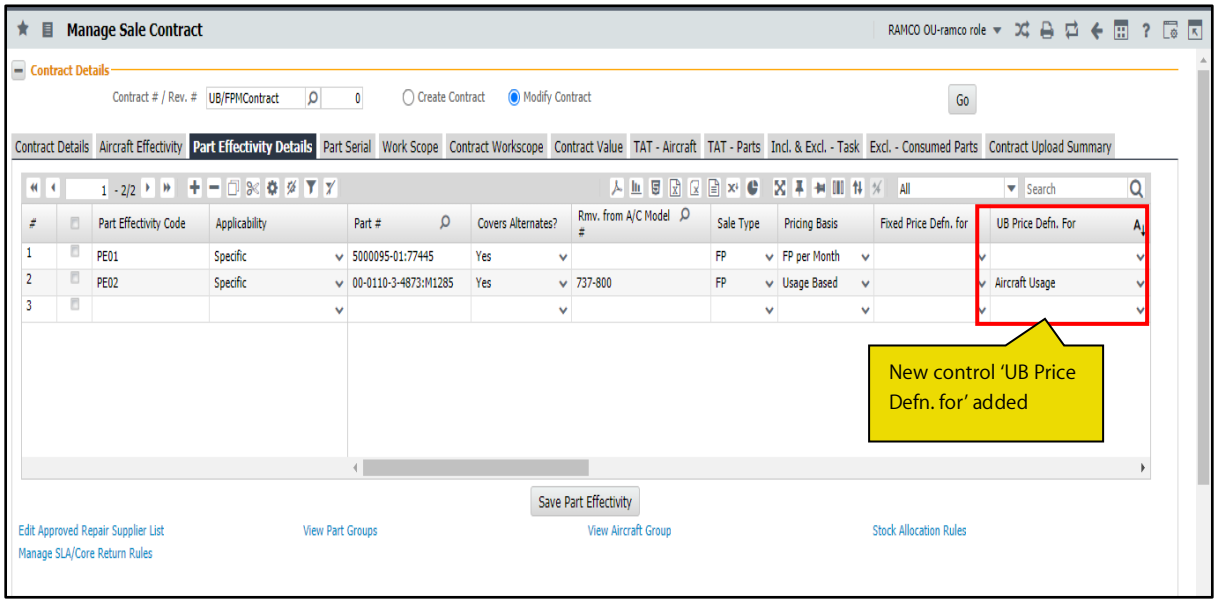


Exhibit 2:

Edit Terms of Execution screen in the **Sale Contract** business component

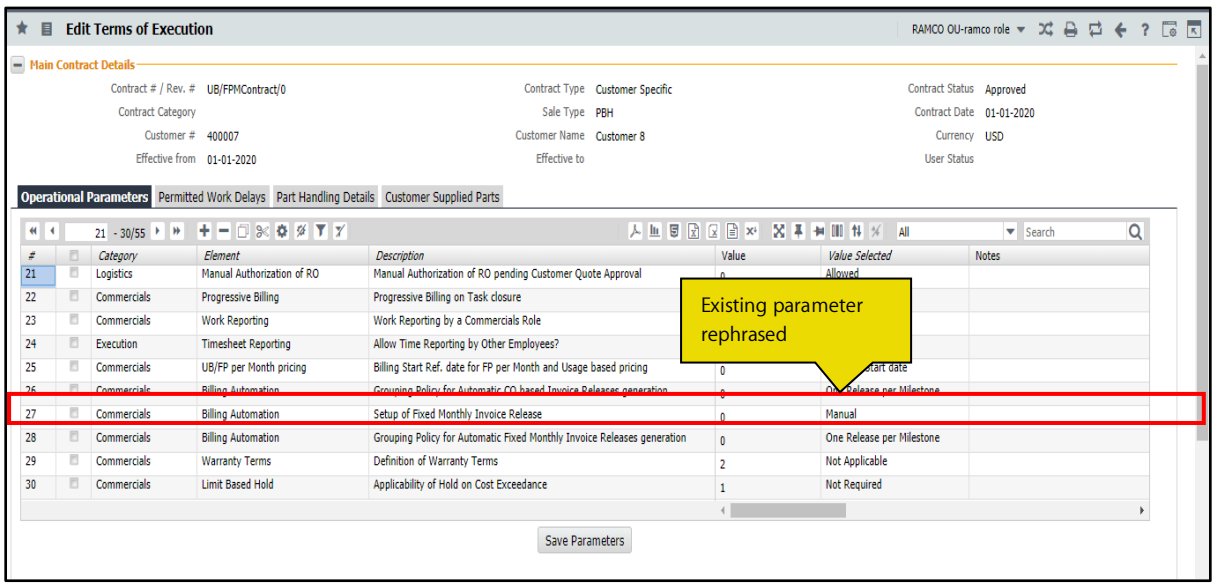


Exhibit 3:

Edit Terms of Execution screen in the **Sale Contract** business component

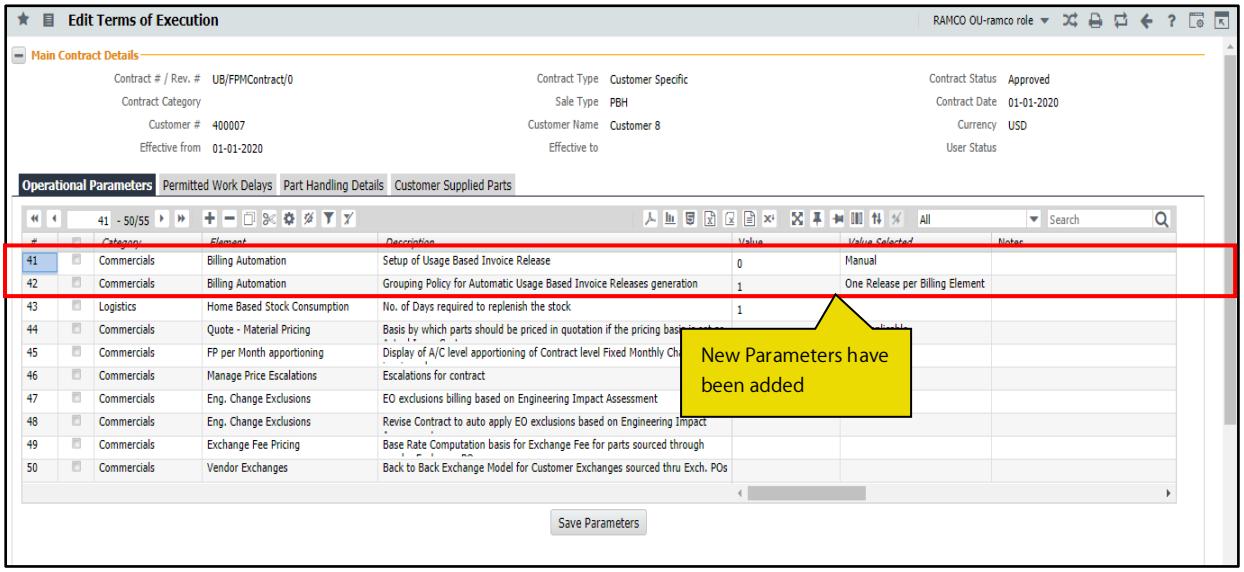


Exhibit 4:

Monthly Inv. & Payment Tab in **'Edit Pricing and Invoicing Details'** UI in **Sale Contract** business component

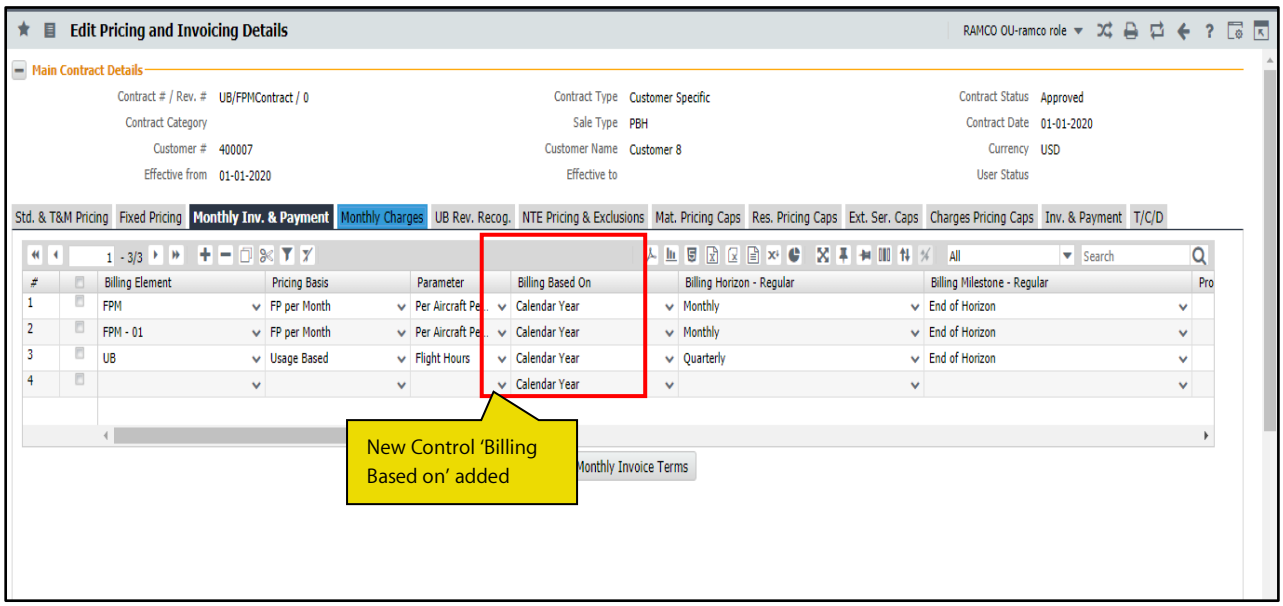
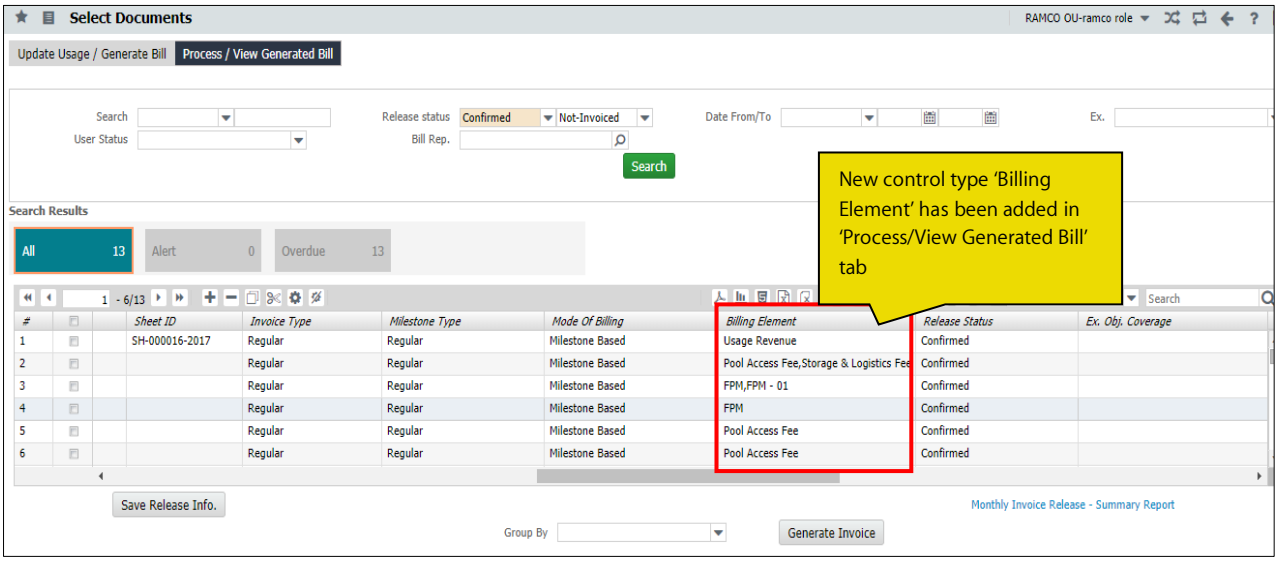


Exhibit 5:

Select Documents screen in the **Service Sale Billing** business component


Select Documents
RAMCO OU-ramco role
Update Usage / Generate Bill
Process / View Generated Bill
Search
User Status
Release status
Confirmed
Not-Invoiced
Bill Rep.
Date From/To
Ex.
Search
Search Results
All 13
Alert 0
Overdue 13
New control type 'Billing Element' has been added in 'Process/View Generated Bill' tab
| Sheet ID | Invoice Type | Milestone Type | Mode Of Billing | Billing Element | Release Status | Ex. Obj. Coverage
1 | SH-000016-2017 | Regular | Regular | Milestone Based | Usage Revenue | Confirmed
2 | Regular | Regular | Milestone Based | Pool Access Fee,Storage & Logistics Fee | Confirmed
3 | Regular | Regular | Milestone Based | FPM,FPM - 01 | Confirmed
4 | Regular | Regular | Milestone Based | FPM | Confirmed
5 | Regular | Regular | Milestone Based | Pool Access Fee | Confirmed
6 | Regular | Regular | Milestone Based | Pool Access Fee | Confirmed
Save Release Info.
Monthly Invoice Release - Summary Report
Group By
Generate Invoice

WHAT'S NEW IN PART SALE MANAGEMENTST?

Ability to raise Customer Request for Regular Exchange

Reference: APRP-1061

Background

Currently the Customer Request framework has the provision to raise request for 'Advance Exchange'. There is a business requirement that the customer request needs to be raised for 'Regular Exchange' as well and in turn generate a customer order for 'Regular Exchange'.

Hence this enhancement brings the improvement in **Customer Request** to raise the new request for 'Regular Exchange'. Based on the Order Automation Set up and Rules a Customer Order with regular exchange option will be automatically set up on confirmation of the Customer Request.

Change Details

1. New 'Request for' option added in **Customer Request**:
   New option 'Regular Exchange' is loaded in the 'Request For' combo on launch of the **Customer Request** screen. All the existing fields and sections that is, Part Info., Core Info. and Work Scope Info. will be applicable to Regular Exch. (**Exhibit-1**)

   Note: Home Based Stock option will not be allowed to be set in case of Request for 'Regular Exchange'.

2. New Parameters added under **Set Sales Process Parameter** screen:
   A new parameter as mentioned below is added in the **Set Sales Process Parameter** screen in the **Customer** component under the **Sales Setup** business process. (**Exhibit-2**)

   Display parameters for: 'MRO Sales'
   Parameter for: Customer Request
   Process Parameter: Auto Generation of Customer Order on confirmation of Customer Request for 'Regular Exchange'
   Permitted value: Specify '0' for Yes, '1' for 'No' and '2' for 'Yes, Based on Rules.
   If the above parameter is set as:

   - Yes: Then Customer Order will always be auto generated on confirmation of customer request.
   - No: Then Customer Order will not be auto generated on confirmation of customer request.
   - Yes, Based on Rules: Then Customer Order will be generated based on the automation rules setup.

3. A new parameter as mentioned below is added in Set Sales Process Parameter screen in Customer component under Sales Setup business process (Exhibit-2)

Display parameters for: 'MRO Sales'

Parameter for: Customer Order - Services

Process Parameter: Status of Customer Order auto-generated through Customer Request for 'Regular Exchange'

Permitted value: Specify '0' for 'Fresh', '1' for 'Confirmed' and '2' for 'Approved'

If the above parameter is set as:

- Fresh: Then Customer Order auto generated will be set up in 'Fresh' status
- Confirmed: Then Customer Order auto generated will be set up in 'Confirmed' status 3. Approved: Then Customer Order auto generated will be set up in 'Approved' status

4. A new parameter mentioned below is added in **Set Sales Process Parameter** screen in **Customer** component under **Sales Setup** business process (**Exhibit – 2)**

Display parameters for: 'MRO Sales'

Parameter for: Customer Request

Process Parameter: Acknowledgment against Customer Requests for "Regular Exchange"

Permitted value: 'Specify "0" for "Required" and "1" for "Not Required"

If the above parameter is set as:

- Required: The Acknowledgment Status against the customer order will be set as 'required' and an acknowledgment needs to be sent to the customer against the request.
- Not Required: The Acknowledgment Status against the customer order will be set as 'Not Required' and the acknowledgment against request is optional.

5. New 'Request for' added in Order Automation rules for Cust. Requests and User Preference screen:

New Option 'Regular Exchange' is loaded in 'Request For' combo on launch of the Maintain Order Automation rules for customer requests screen. (**Exhibit-3**)
This will enable the user to define the Automation Rules for Customer Requests for 'Regular Exchange'

New Option 'Regular Exchange' is loaded in 'Business Type' combo on launch of the User Preference screen. (**Exhibit-4**)
This enables the user to define the User Preference definitions for visibility of Customer Requests for 'Regular Exchange' in **Customer Order Management Hub**.

✎ *Note: The J Query rules for Business Type 'Regular Exchange' combo will be same as the 'Adv. Exchange'.*

✎ *Note:*

a) In case of customer requests for 'Regular Exchange', the 'Request for/ Type' & 'Request for' column in Request & Order Summary multiline will be displayed as 'Regular Exchange'.

b) On click of Customer Request # for 'Regular Exchange', the 'Request for' control in the request details section is displayed as 'Regular Exchange'.

c) *On click of Customer Order for 'Regular Exchange', the 'Job Type' control in the order details section is displayed as 'Reg. Exchange with Repair'.*

6. Auto Generated CO through Request for 'Regular Exchange': (Exhibit-5)

In the Customer Order Auto generated from Customer Request for 'Regular Exchange', 'Exchange Type' will be defaulted as 'Exchange with repair', 'Reason for Exch.' will be defaulted based on the set option defined under **Define Process Entity** screen, 'Initiated As' combo will be defaulted as 'Regular' and Part details will be fetched based on RFQ details.

The 'Service Type' is considered as 'Exchange' during contract evaluation in case of customer requests with Request for 'Regular Exchange'.

Exhibit 1:

Manage Customer Request screen in the **Manage Sales RFQ** business component

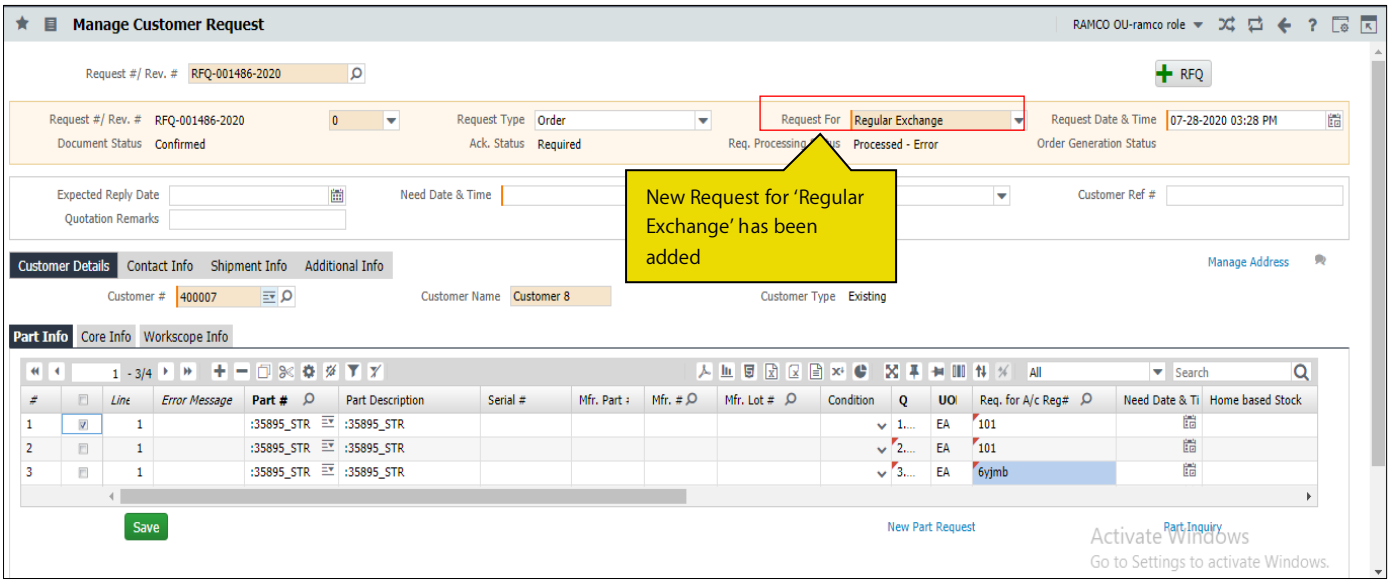


Exhibit 2:

Set Sales Process Parameters screen

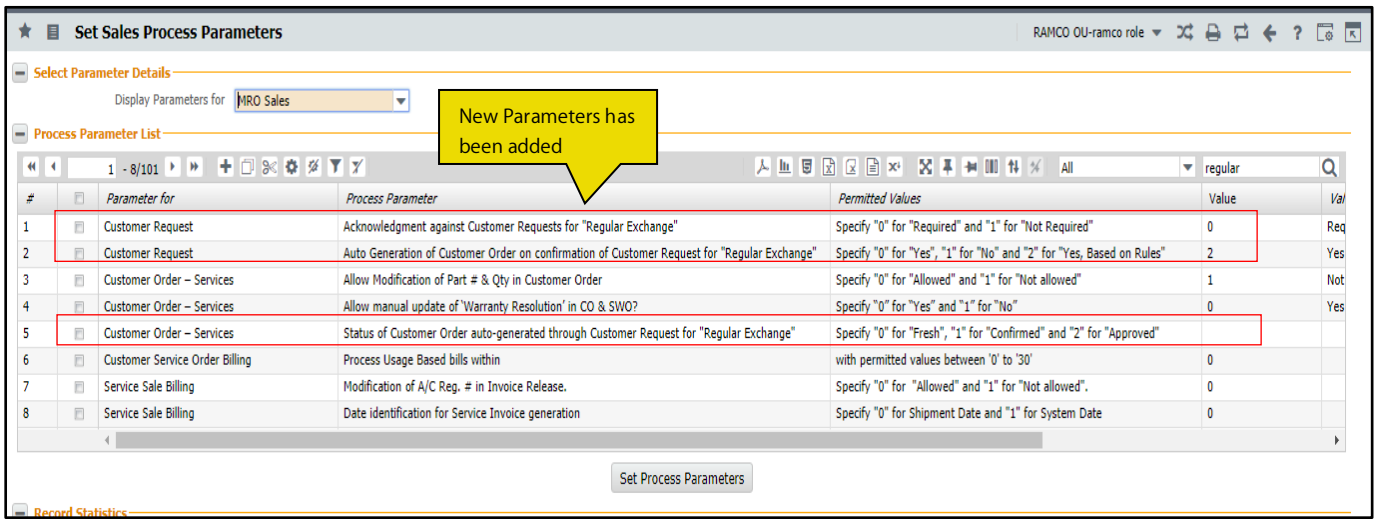


Exhibit 3:

Maintain Order Automation rules for customer requests screen

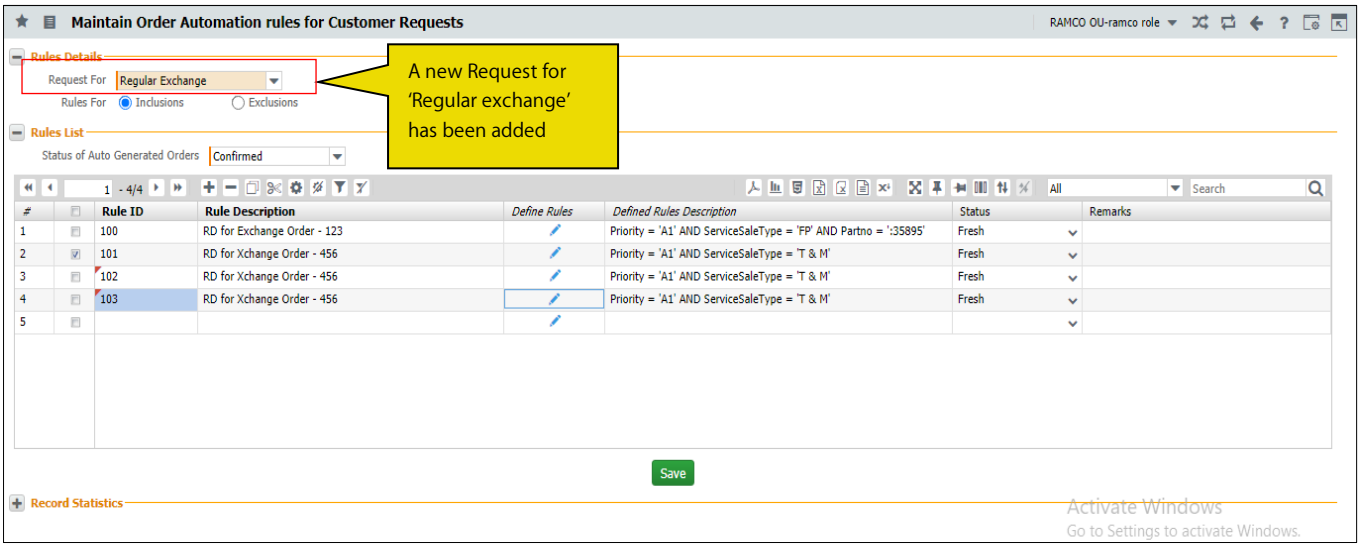


Exhibit 4:

Customer Order management - User Preference **Manage Screen Defaults and Preference** activity in **User Preference**

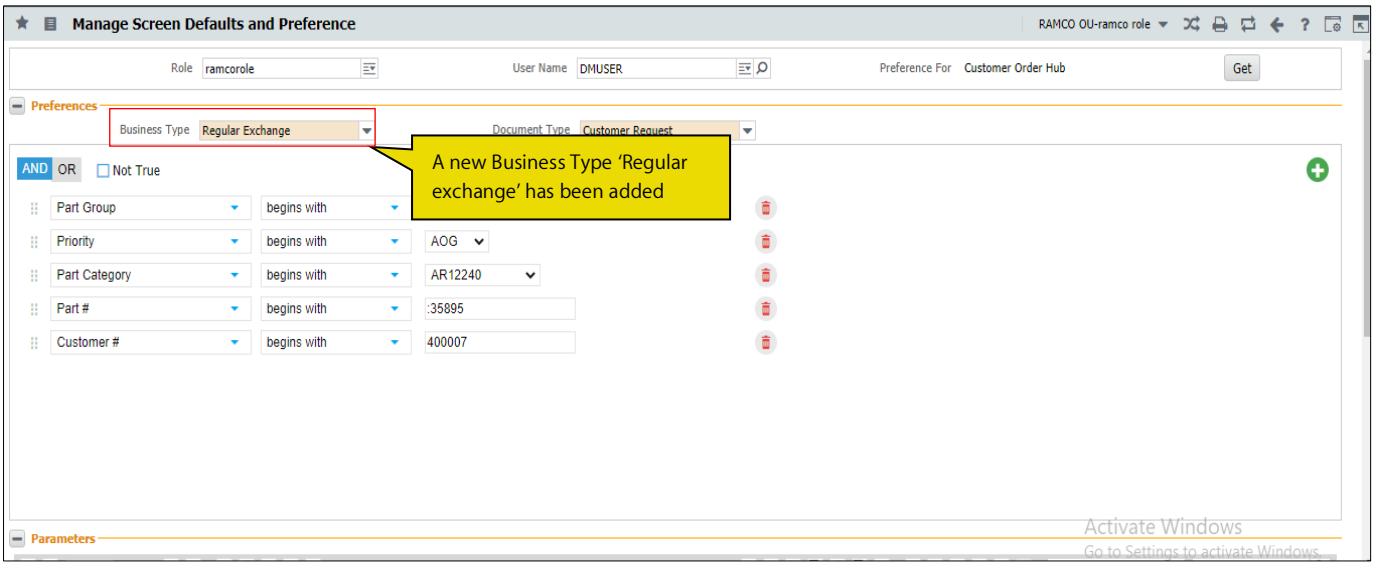
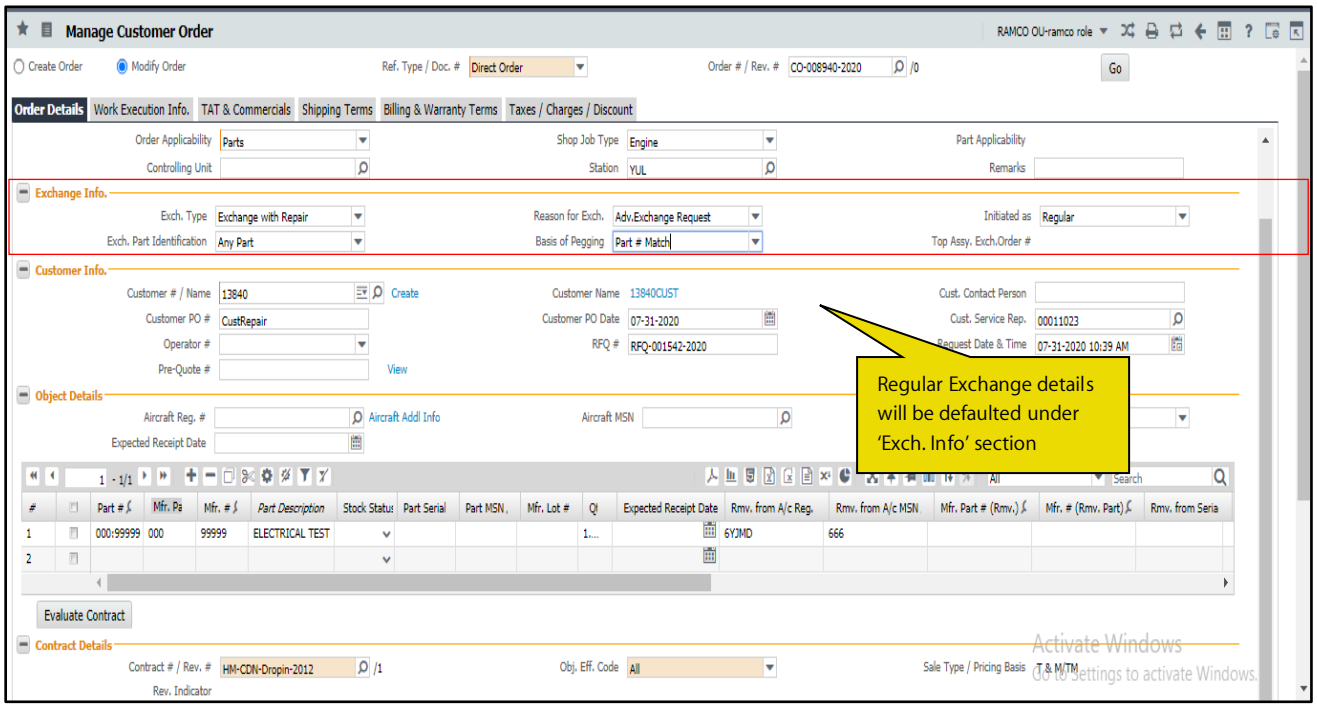


Exhibit 5 :

Customer Service Order - Manage Customer Order screen


Manage Customer Order
Create Order
Modify Order
Ref. Type / Doc. #
Direct Order
Order # / Rev. #
CO-008940-2020
Go
Order Details
Work Execution Info.
TAT & Commercials
Shipping Terms
Billing & Warranty Terms
Taxes / Charges / Discount
Order Applicability
Parts
Shop Job Type
Engine
Part Applicability
Controlling Unit
Station
YUL
Remarks
Exchange Info.
Exch. Type
Exchange with Repair
Reason for Exch.
Adv.Exchange Request
Initiated as
Regular
Exch. Part Identification
Any Part
Basis of Pegging
Part # Match
Top Assy. Exch.Order #
Customer Info.
Customer # / Name
13840
Create
Customer Name
13840CUST
Cust. Contact Person
Customer PO #
CustRepair
Customer PO Date
07-31-2020
Cust. Service Rep.
00011023
Operator #
RFQ #
RFQ-001542-2020
Request Date & Time
07-31-2020 10:39 AM
Pre-Quote #
View
Object Details
Aircraft Reg. #
Aircraft Addl Info
Aircraft MSN
Expected Receipt Date
Part #
Mfr. Pa
Mfr. #
Part Description
Stock Status
Part Serial
Part MSN.
Mfr. Lot #
Qt
Expected Receipt Date
Rmv. from A/c Reg.
Rmv. from A/c MSN
Mfr. Part # (Rmv.)
Mfr. # (Rmv. Part)
Rmv. from Seria
1
000:99999
000
99999
ELECTRICAL TEST
6YJMD
666
2
Evaluate Contract
Contract Details
Contract # / Rev. #
HM-CDN-Dropin-2012
/1
Obj. Eff. Code
All
Sale Type / Pricing Basis
T & M/TM
Rev. Indicator
Regular Exchange details will be defaulted under 'Exch. Info' section
Activate Windows
Go to Settings to activate Windows.

Ability to manage Order confirmation acknowledgements for Part Sale Order

Reference: APRP-730

Background

When a Part Sale Request is received from a Customer, Request is generally acknowledged and a confirmation is to sent to customer. Similarly, when a Part Sale Order is created and confirmed, an acknowledgment is be sent to the Customer so that the customer has an idea about the status of the order.

Provision needs to be given in the **Manage Part Sale Order** screen to provide such acknowledgment to PSO's. The user will be able to acknowledge the PSO which in turn sends an auto mail to the customer contact person.

Change Details

- A new button 'Acknowledge' is added in the **Manage Part Sale Order** screen under the **Part Sale Order** business component, visible post the confirmation of a PSO. (Exhibit 1)

- A new status 'Acknowledgement Status' is added in the **Manage Part Sale Order** screen which will display the acknowledgement status of the Part Sale Order. (Exhibit 2)
  - ✓ Pending: If the Parameter for Acknowledgment is set as 'Required' till the Acknowledgement is done.
  - ✓ Acknowledged: If the Acknowledgement is done against the Part Sale Order.
  - ✓ Not Required: If the Parameter for Acknowledgment is set as 'Not Required'.

- New Controls 'Ack. Date & time' and 'Ack. Remarks' are added to capture the Ack. Date and Remarks. (Exhibit 1)

- On Acknowledgement of PSO, an auto-email will be triggered and acknowledgement details will be sent to Email Id of the respective contact person of the customer.

Exhibit 1:

Manage Part Sale Order screen in the **Part Sale Orde**r business component

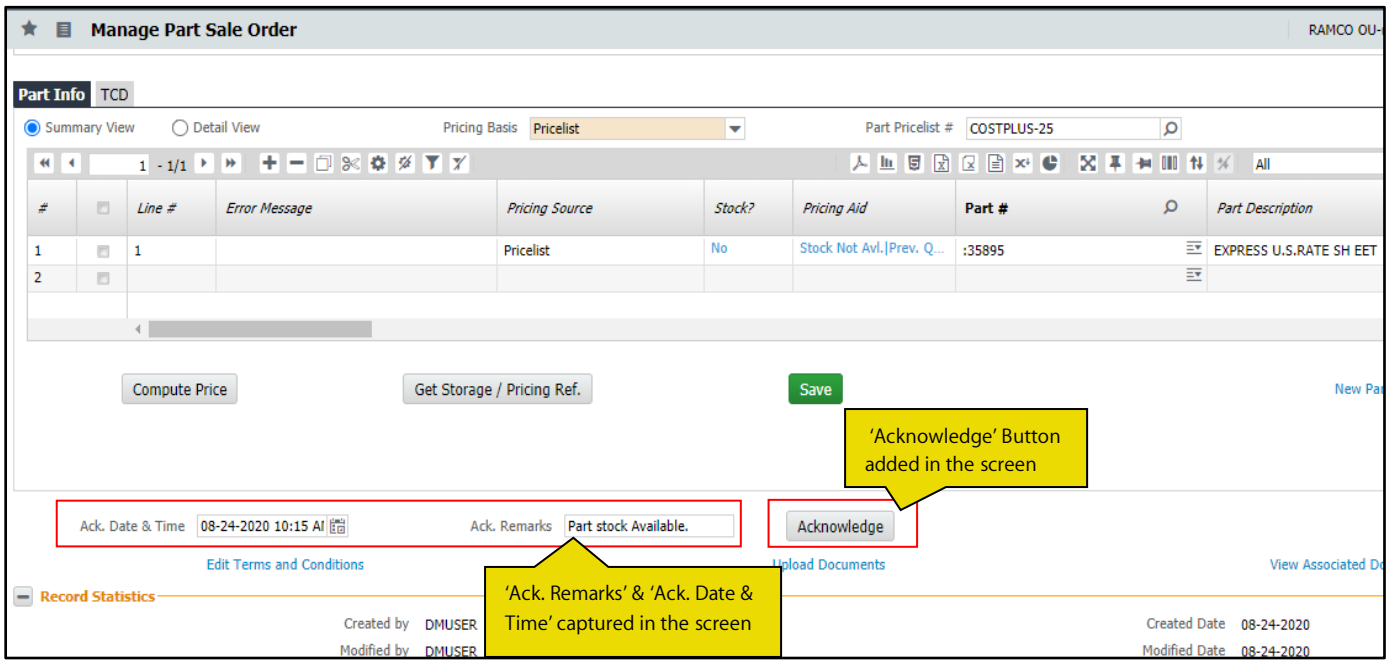
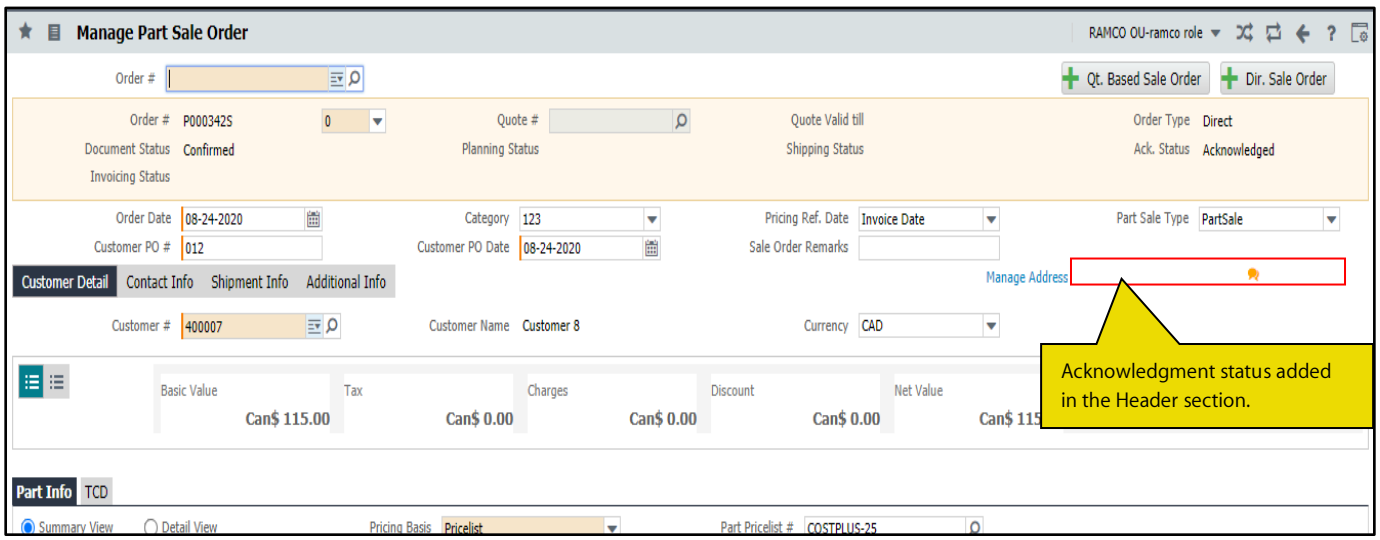


Exhibit 2:

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



Ability to automatically generate Part Sale Orders based on Agreed Customer Part Sale List

Reference: APRP-605

Background

When a Customer Request with Request Type: 'Order' for 'Sale' is received from a Customer, the Request needs to be manually processed a Part Sale Order needs to be set up manually with the reference of the Request #. Hence the requirement is to have a provision to automatically set up a Part Sale Order against Customer Request received with Request Type: Order and Request for: Sale.

Customer Request has been enhanced and an automation process will be run based on option setting to generate Part Sale Order on confirmation of request.

Change Details

1. New controls are added in the **Manage Part Sale Order** screen under the **Part Sale Order** business component. **(Exhibit 1&2).**
    - **RFQ #:** To display the 'Request #' based on which the Part Sale Order is auto generated.
    - **Part Sale List #:** To identify the Part Sale List # based on which the Part Sale order is generated. Defaulted with Part Sale List # evaluated and identified for the customer-part combination during auto generation of Part Sale Order from Customer request. (based on option setting)
    - **Billable?:** To identify the 'Billability' of the part sale order. Defaulted based on the set option at 'Part Sale Type' on auto generation of Part Sale Order from customer request.
    - **Req. for A/C Reg #**: To identify the A/C Reg. # for which the part is being requested. Defaulted with Req. for A/C Reg. # from customer request during auto generation of Part Sale Order.
    - **SLA Category, Request Purpose, Request Source** – New Combo Control added in the 'Additional Info.' Tab to identify the request attributes. Loaded with the values defined for the respective category types under **Maintain Category Codes** maser. Defaulted based on the values selected in the Customer Request during auto generation of part sale order.
2. A new parameter is added in **Sales Setup > Customer > Set Sales Process Parameter**' screen to specify whether evaluation of Part Sale List # is required or not during auto generation of the PSO from customer request **(Exihibit-3).**

    Display Parameters for: Part Sale Order
    Parameter for : Part Sale Order
    Process Parameter : Evaluation of Agreed Customer Part Sale List for Part Sale Order generation

Permitted Value : '0' for Not Required, '1' for Required

If the above parameter is set as:

I. Not Required: Part Sale List# will not be evaluated during Part Sale Order generated and default part sale type for PSO generation will be identified based on the set option added at customer master level.

II. Required: Part Sale List # will be evaluated and Part Sale Type will be defaulted based on the PSL # during Part Sale Order generated.

3. A new parameter is added in the **Sales Setup > Customer > Manage Additional Options** screen to specify the default 'Part Sale Type' to be considered for auto PSO generation if the Part Sale List # is set as 'Not Required'**(Exihibit-4).**

Category : Part Sales

Process Parameter: Default Part Sale type for Auto Sale Order Generation.

Permitted Values : Enter a valid Part Sale type with Program type as 'Regular Sales'.

4. New Parameters have been added in the **Maintenance Setup > Common Master >Set Process Entities** to define the default values to be considered for stock status, Sourcing option and Condition during auto generation of PSO from customer request **(Exihibit-5).**

I. Entity Type: Part Sale Type
   a. Process Parameter : Default Stock status for automated Part sale Orders
   b. Permitted Values : Enter a valid stock status defined under Logistics Common Master

II. Entity Type: Part Sale Type
   a. Process Parameter: Default Sourcing option for automated Part sale Orders
   b. Permitted Values : Select '0' for 'Inventory', '1' for Regular Procurement and '2' for Drop ship procurement

III. Entity Type: Part Sale Type
   a. Process Parameter: Default Part Condition for Serial/Lot controlled parts in automated Part sale Orders
   b. Permitted Values : Select '0' for 'New', '1' for 'Overhauled', '2' for 'Serviceable' and '3' for 'Unserviceable

Note:

- *Based on the set option 'Auto Generation of Part Sale Order on Confirmation of Customer Requests' at set process parameters level, the Customer Request will be processed and Part Sale Order will be auto generated always or based on certain business conditions or will not be automated.*

I. A Customer Request in 'Confirmed' status would be validated for data correctness before processing to an order. Only those requests which are eligible for automation (based on rules) will be processed in to a Part Sale Order.

II. Once the data is validated, Part Sale List # will be evaluated set option for valuation is set as 'Required'. If the Set option is set as 'Not Required', then

the default part sale type from customer master will be considered for automation

III. If the Automation is set as 'based on Rules', then the automation rules for 'Request for: Sales will be evaluated and only those requests satisfying(inclusion definitions) or not satisfying (exclusion definitions) will be processed into order.

If the Automation is set as 'Yes', the automation rules will not be considered.

- *The set option 'Status of Auto-generated Part Sale order through Customer Request' under set sales process parameters will be considered to identify the status in which the 'Part Sale Order' should be set up if the 'Auto Generation of Part Sale Order on confirmation of Customer Request' is set as 'Yes.'*
- *Based on the value selected against the status parameter, automated Part Sale Order generated will be generated in 'Fresh/Confirmed/Processed' Status.*

Note: However the Part Sale Order automatically generated from Requests will be in 'Draft' status irrespective of the above parameter, if all the mandatory details required for Order set up are not available.

5. Processing logic for Automation of Customer Request to Part Sale Orders:
   - When a request document has a single part (evaluation with a single PSL), a single Part Sale Order will be will be generated against the customer request.
   - When a Request document has Different Part #(s) with Single/Multiple qty and both the lines evaluated against same Part Sale List, the one Part Sale Order will be generated for the request.
   - When a Request document has Different Part #(s) with Single/Multiple qty evaluated with different Part Sale Type, then one Part Sale Order will be generated for each 'Part Sale Type'.
   - When a Request document has multiple Part# in multiple lines and if any part# doesn't have a PSL, then order will not be generated and the request will be updated as error.
   - When a Request Document has multiple Part(s)# and if any part has multiple PSL, then Order will not be generate and request will be updated as error.

6. Impact in CO HUB for Automation of Customer Request to Part Sale Order:
   - All the Requests with Request for 'Sales' are shown in respective tiles depending on the document/Req. processing status of the Request.
   - When the automation is set as 'No', the requests will be fetched in the 'Customer Order

     Management Hub' under the tile 'Unprocessed Requests'. On click of 'Process Request' button in Summary or Detail Section the request will be processed to PSO.

Exhibit 1:

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

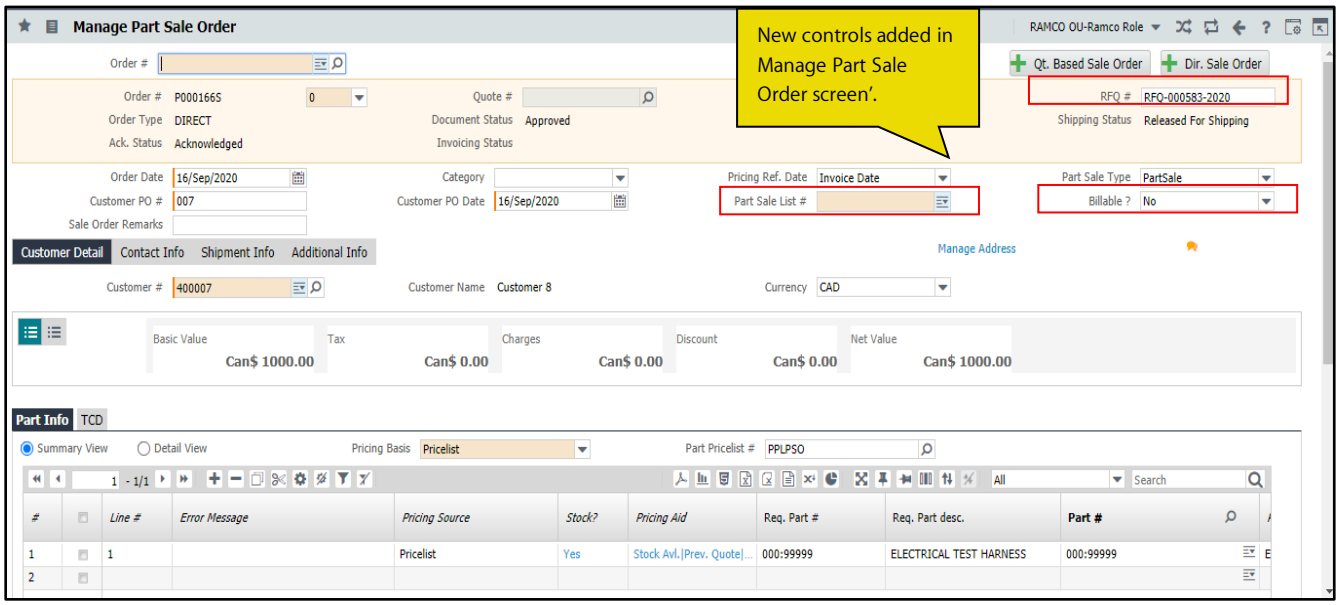


Exhibit 2:

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

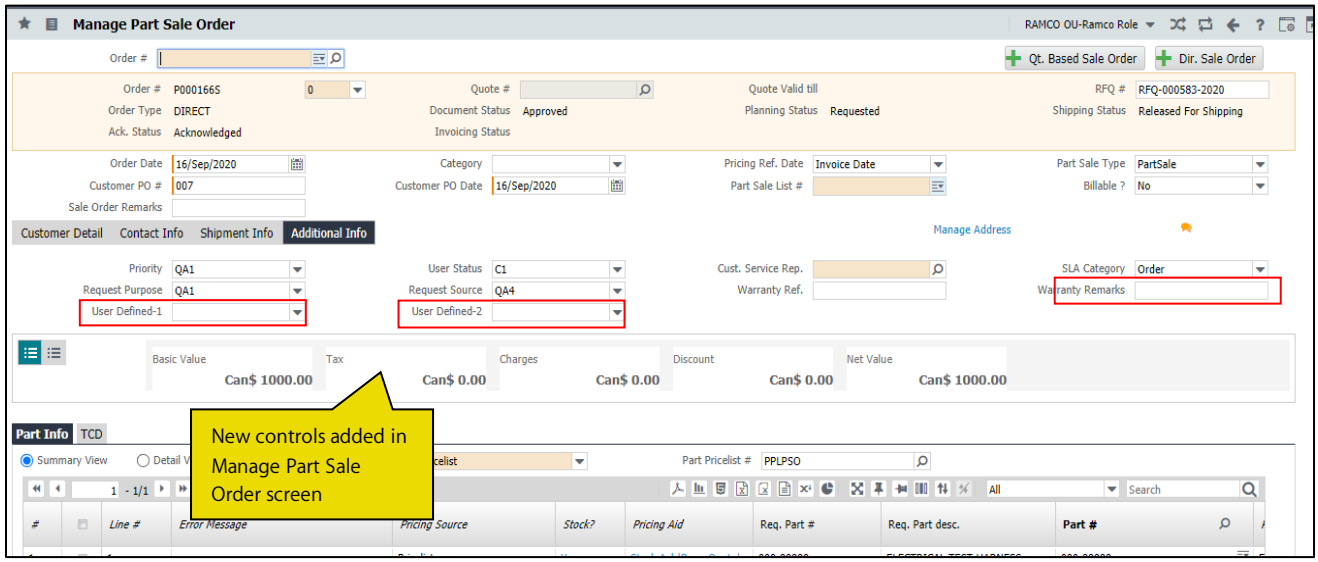


Exhibit 3:

Set Sales Process Parameter screen in the **Customer** business component

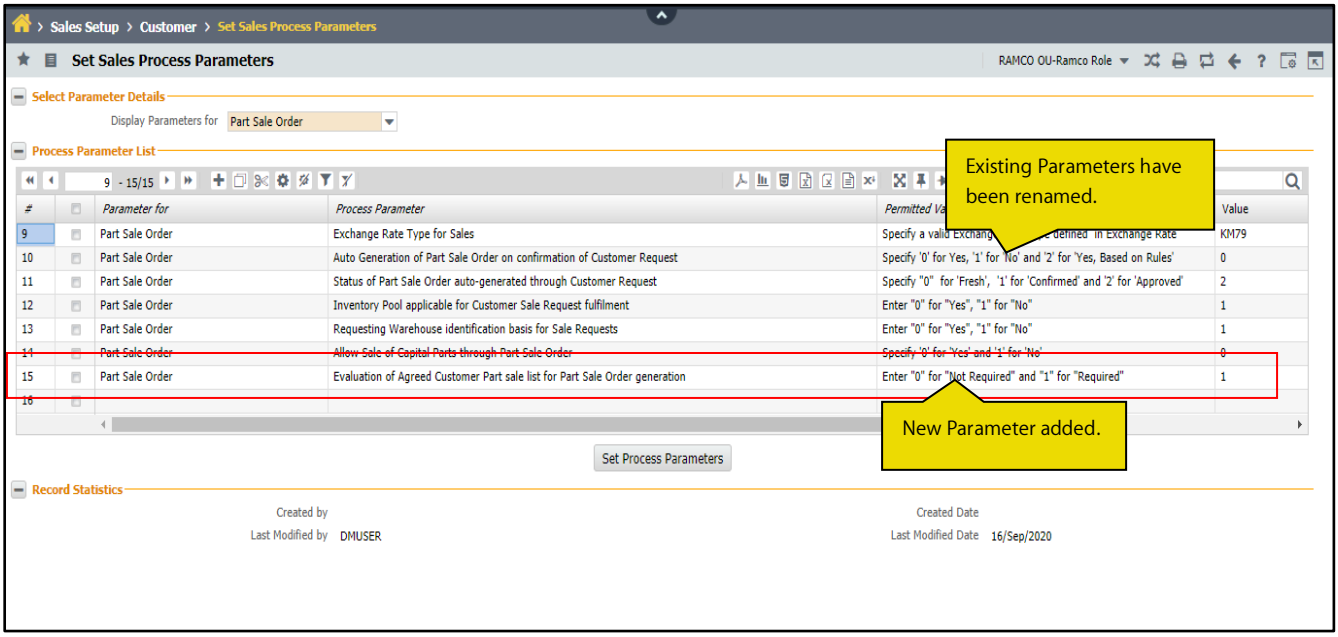


Exhibit 4:

Manage Additional options screen in the **Customer** business component

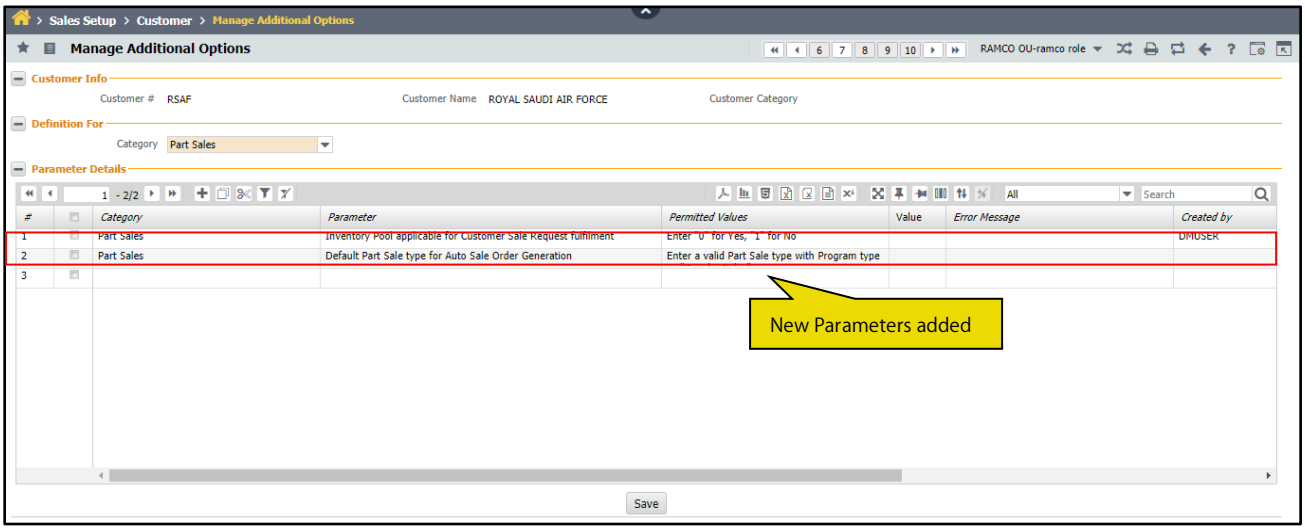
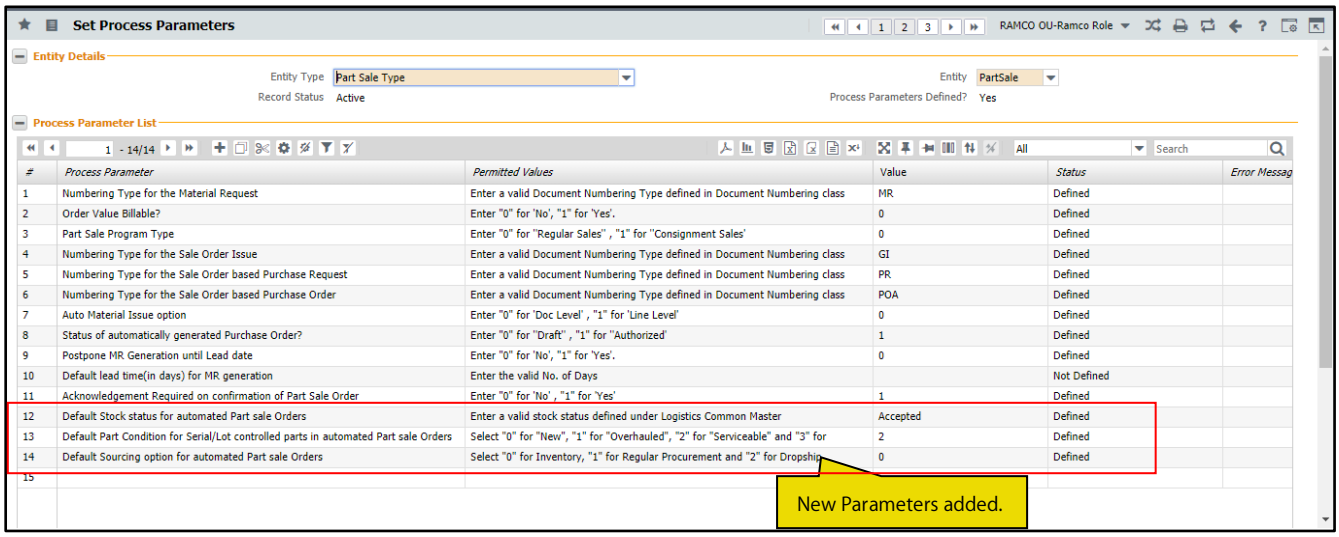


Exhibit 5:

Set Process Parameter screen in the **Common Master** Business component


Set Process Parameters
RAMCO OU-Ramco Role
Entity Details
Entity Type Part Sale Type
Entity PartSale
Record Status Active
Process Parameters Defined? Yes
Process Parameter List
1 - 14/14
All
Search
| Process Parameter | Permitted Values | Value | Status | Error Messag
1 | Numbering Type for the Material Request | Enter a valid Document Numbering Type defined in Document Numbering class | MR | Defined
2 | Order Value Billable? | Enter "0" for 'No', "1" for 'Yes'. | 0 | Defined
3 | Part Sale Program Type | Enter "0" for "Regular Sales" , "1" for "Consignment Sales' | 0 | Defined
4 | Numbering Type for the Sale Order Issue | Enter a valid Document Numbering Type defined in Document Numbering class | GI | Defined
5 | Numbering Type for the Sale Order based Purchase Request | Enter a valid Document Numbering Type defined in Document Numbering class | PR | Defined
6 | Numbering Type for the Sale Order based Purchase Order | Enter a valid Document Numbering Type defined in Document Numbering class | POA | Defined
7 | Auto Material Issue option | Enter "0" for 'Doc Level' , "1" for 'Line Level' | 0 | Defined
8 | Status of automatically generated Purchase Order? | Enter "0" for "Draft" , "1" for "Authorized' | 1 | Defined
9 | Postpone MR Generation until Lead date | Enter "0" for 'No', "1" for 'Yes'. | 0 | Defined
10 | Default lead time(in days) for MR generation | Enter the valid No. of Days | | Not Defined
11 | Acknowledgement Required on confirmation of Part Sale Order | Enter "0" for 'No' , "1" for 'Yes' | 1 | Defined
12 | Default Stock status for automated Part sale Orders | Enter a valid stock status defined under Logistics Common Master | Accepted | Defined
13 | Default Part Condition for Serial/Lot controlled parts in automated Part sale Orders | Select "0" for "New", "1" for "Overhauled", "2" for "Serviceable" and "3" for | 2 | Defined
14 | Default Sourcing option for automated Part sale Orders | Select "0" for Inventory, "1" for Regular Procurement and "2" for Dropshi | 0 | Defined
15
New Parameters added.

Ability to record and confirm request amendments & auto process the changes to the downstream documents

Reference: APRP-1040

Background

This enhancement brings improvements in **Customer Request** where in Customer Requests for a part on Sale/Exchange/Repair/Rent etc.

In certain cases, the details provided in the request may be entered incorrectly or customer may also wish to modify specific details in the Request which may include:

1. Source of demand viz., Aircraft Reg.#, Request Purpose, Request source document, etc.
2. Change the actual demand viz., change in Need Date & Time, Priority.
3. Change to instructions like Ship to location, delivery remarks etc.

There may also be scenarios where Customers would cancel their requests too if they no longer need the part.

Currently once the Customer Request is confirmed, there is no provision to update/modify the details or short close the request.

Hence the Requirement is to have a provision to revise the Customer Request to update certain details even after confirmation or Short close the Request if the Customer doesn't want to proceed with the order.

Request document has been given a provision to track changes through a revision reference.

Change Details

Customer Request – Amendments:

1. A new combo control is added to select/display the **'Revision#'** of the Request under the **Part Sale Management** business process > **Manage Sales RFQ** component >**Manage Customer Request** activity (**Exhibit 1).**

   ✎ *Note: The 'Rev #' combo will be loaded with all the revision(s)# available for that specific Request # and is defaulted with the latest Revision of the customer request selected.*

   ✎ *Note: Only the following data is allowed to be modified after confirmation of Requests.*

   - Req. for A/C Reg#
   - Request Purpose
   - Request Source
   - Need Date & Time
   - Priority
   - Ship to Address ID
   - Contact Address ID

   ✓ Currently Revision of Requests will be allowed to be generated only against Request for 'Advance Exchange' with Request Type 'Bid'.

   ✓ Requests in 'Cancelled/Rejected' status will not be allowed to be revised.

- A new control **'Rev #'** has been added in the multiline of the **Help on Customer Request** screen. All the valid Request(s)# created along with all the Revision(s) available will be retrieved in the multiline of the **Help on Customer Request** screen. (**Exhibit-2).**

✎ *Note: On confirmation of New Revision of the Customer Request:*

- If the Customer Order is already generated against the request, then all the modified details of the request will be updated in the Customer Order and the status of the CO is retained as it was before.
- If the Customer Order is not yet generated or the Request is not yet processed, then the latest revision of the request of the request will be taken forward for processing.

✓ The details will be directly updated into the Customer Order and no validation will be done with respect to the contract validity based on modified details (i.e.) No Contract Re-assignment will be done automatically).

✓ If the Customer Order is already in 'Draft/Fresh' status, the modified details will be updated in the same revision. If the Customer Order is in 'Confirmed/Approved/Processed' status, then a new revision will be created, the details will be updated and that revision will be made 'Confirmed/Approved/Processed' as applicable.

✓ Furthermore, the modified details will be updated to the Exchange Order, Material Request, General Issue as applicable if the documents are already created.

Customer Request - Short Closure:

2. A new button **'Short Close'** is added under the **Part Sale Management** business process > **Manage Sales RFQ** component >**Manage Customer Request a**ctivity. (**Exhibit 1).**

✎ *Note:On 'Short Close' of Customer Request in 'Confirmed' status.*

- If the general Issue is already created, then
  - The Customer Request, Customer Order, Exchange Order, Material Request will be 'Short Closed' and
  - the 'General Issue' will be 'Cancelled'
- If only MR is created, then
  - The Customer Request, Customer Order, Exchange Order will be 'Short Closed' and the Material Request will be 'Cancelled (if Fresh)/Short Closed (if Confirmed)'
- If only EXO is created
  - The Customer Request, Customer and Exchange Order will be 'Short Closed'
- If only CO is created
  - The Customer Request will be 'Short Closed' and the Customer Order will be 'Cancelled (if Draft/Fresh)/Short Closed (if Confirmed /Approved /Processed)'.

- ✓ Revision/Short Cosure of the Request will be allowed only untill threshold event is not reached. In case of Request for 'Advance Exchange' , the threshold event is – confirmation of Issue for at least one part against the exchange MR generated for the EXO raised against the Request.

Exhibit 1 :

Manage Customer Request screen in the **Manage Sales RFQ** business component

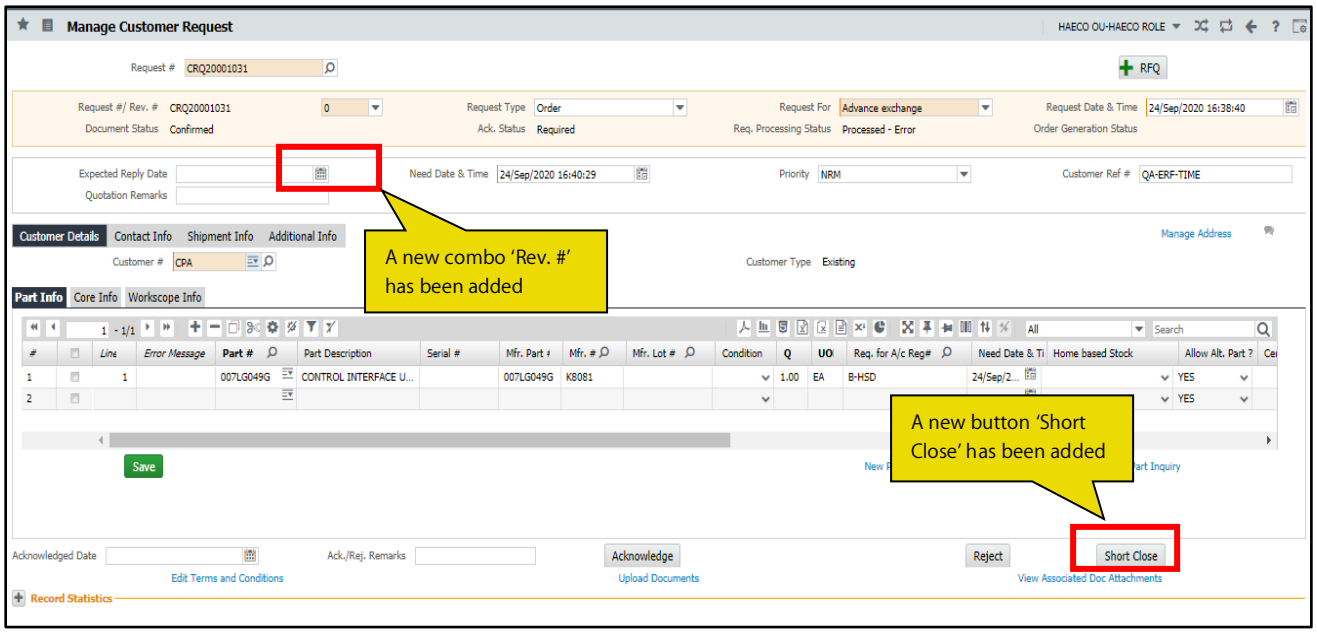
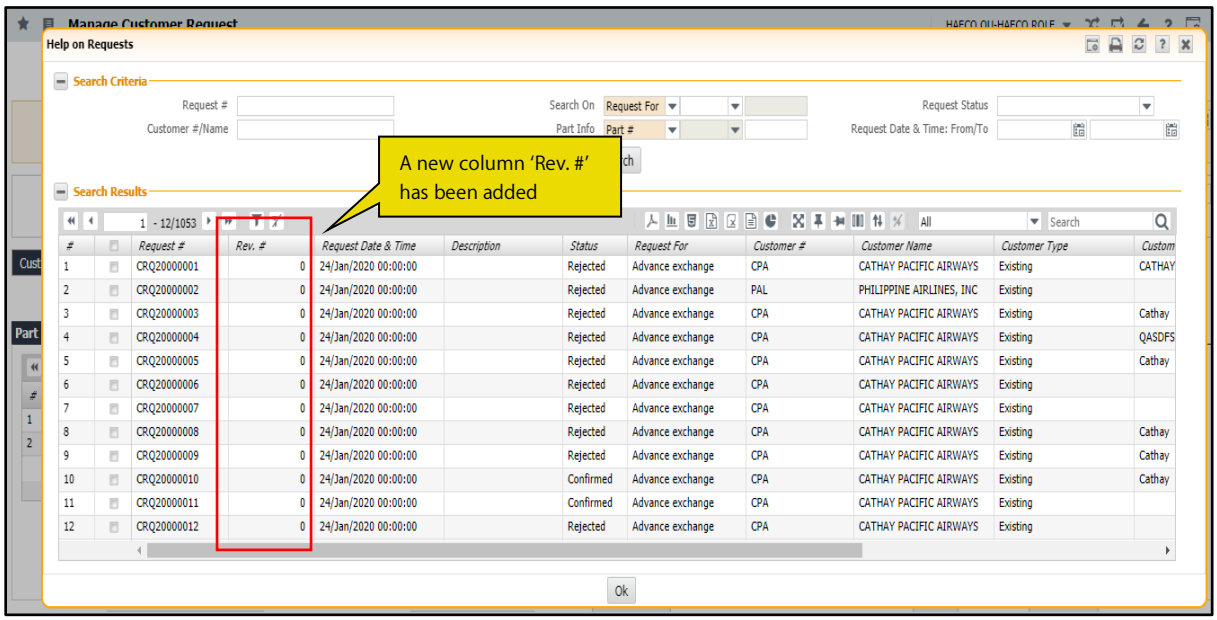


Exhibit 2 :

Help on Requests screen in the **Manage Sales RFQ** business component



WHAT'S NEW IN PAYABLES MANAGEMENT?

Ability to derive applicable INCO term for Delivery Charges Invoices

Reference: APRP-314

Background

Currently, there is an INCO Term Master screen where the responsibility and the billability of the charges incurred during a shipping transaction is defined. The charges incurred in the process will usually be bared either by the receiver or sender. All the charges incurred during delivery of a shipment will be recorded through a Delivery Charges (DC) Invoice which will in turn be billed back to the customer or considered as expense based on the INCO master.

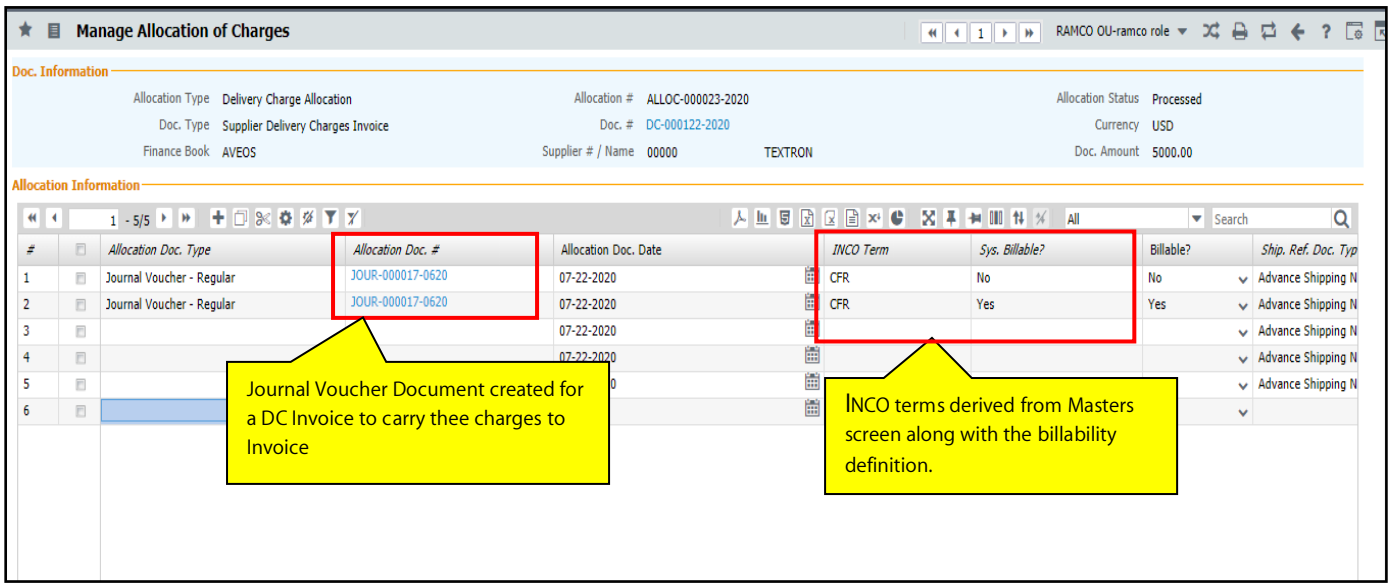
Hence in DC Invoice generated with reference to a customer order, a provision has been made to derive the applicable INCO terms and its billability. Based on the billability, if the delivery charges need to be billed to the customer, then a journal voucher will be generated for the cost incurred and will be added to the Invoice as additional charges as per the agreement made between the two parties.

Change Details

In **Manage Allocation of Charges**, against a DC Invoice with a CO reference, the applicable INCO Term and the billability will be derived based on the INCO Terms (Customer/Contract, Shipping Address will be considered as key for deriving INCO Term).
On confirmation of allocation, a journal voucher will be generated for the delivery charges. (Exihibit-1)

Exhibit 1:

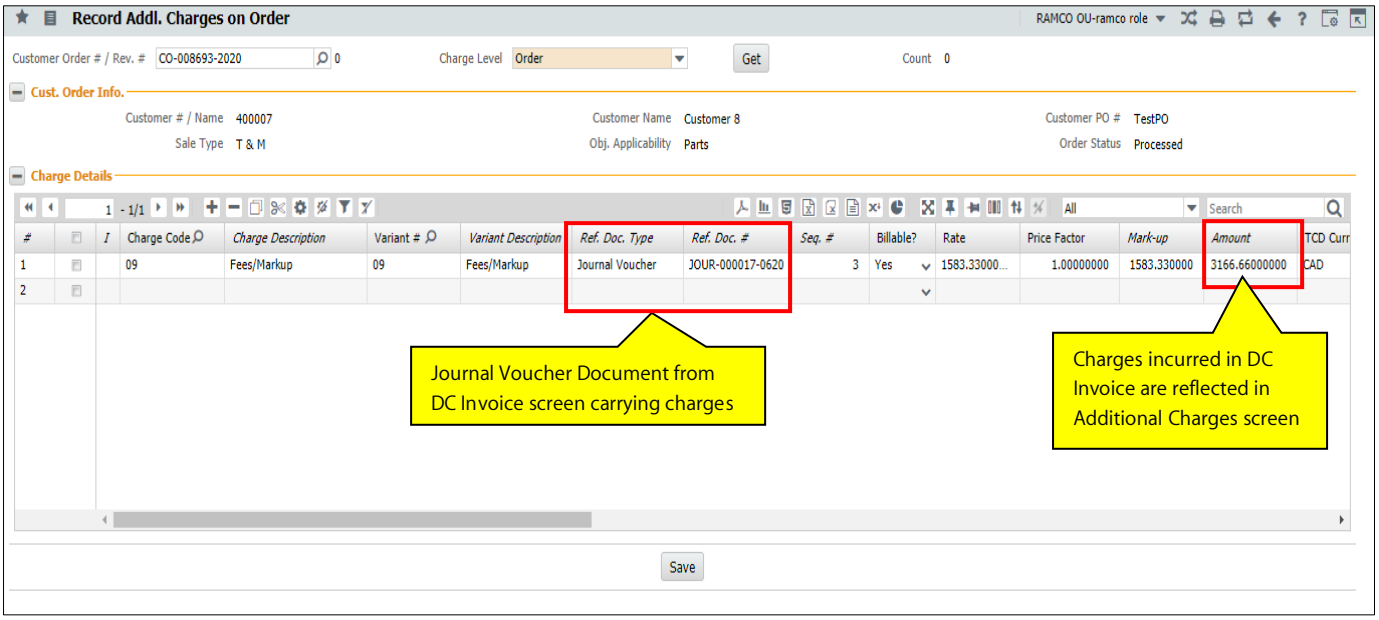
Manage Allocation of Charges screen under the **Supplier Order Based Invoice** business component



The Journal Voucher created will be coming up in the **Manage Addl. Charges on Order** against the CO along with the billability. (Exihibit-2)

Exhibit 2:

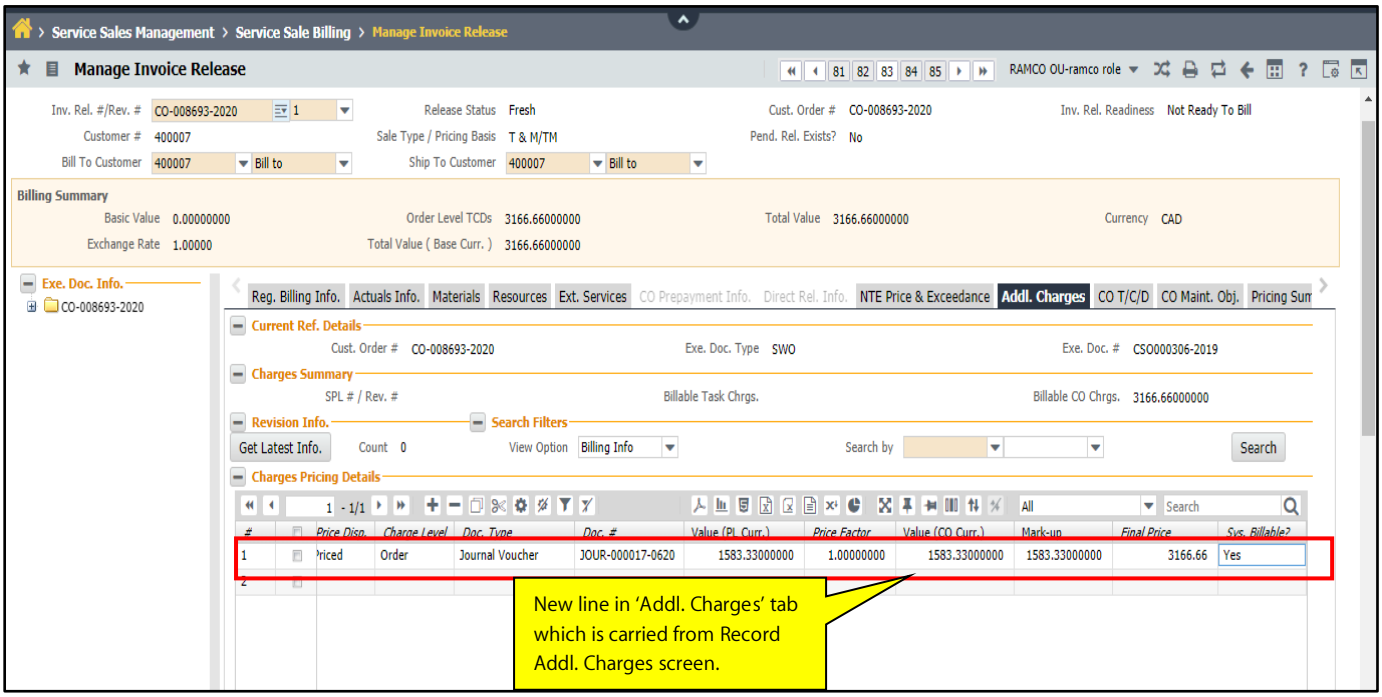
Record Addl. Charges on Order screen in the **Customer Service Order** business component



This Journal Voucher will be billed to the customer as an additional charge and it will be available in the 'Addl. Charges' tab in the **Manage Invoice Release** screen (Exhibit 3)

Exhibit 3:

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



In the **Maintain Expense Liability Rules For INCO terms** and **Maintain Default Rules For INCO Terms** screen, the Cost Element combo has been renamed as 'Source Document', 'Cost Head' combo has been renamed as 'Cost Entity' and 'TCD Code' column has been hidden in the screen. The 'Source Document' combo will now load only 'DC Invoice' (Exhibit 4 & 5).

Exhibit 4:

Maintain Expense Liability Rules for INCO Terms screen in the **Logistics Common Master** business component

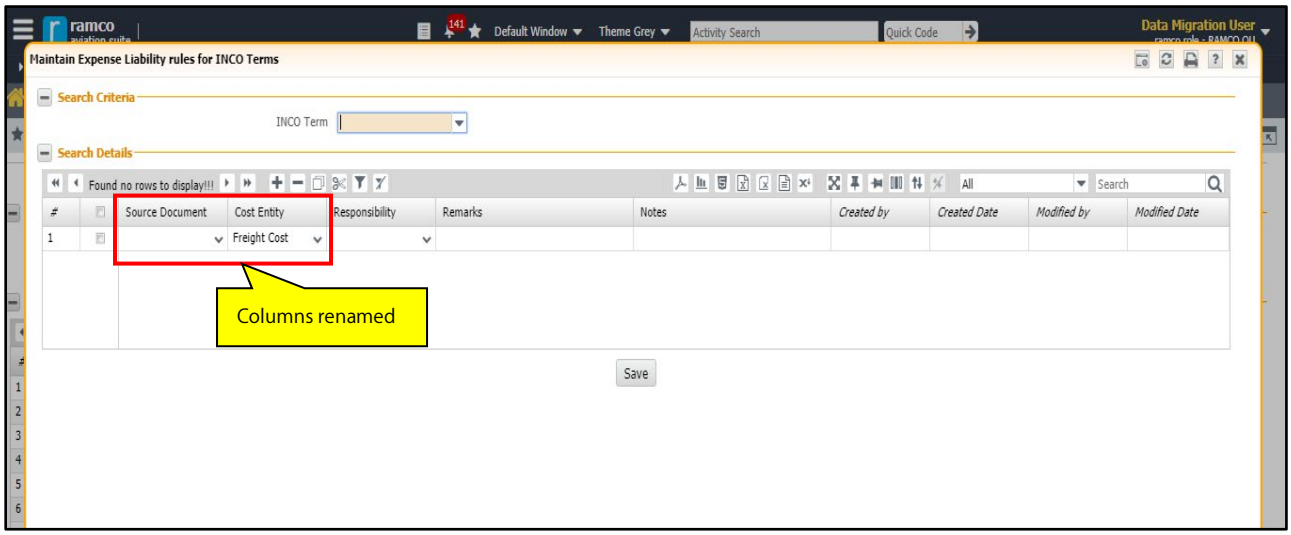
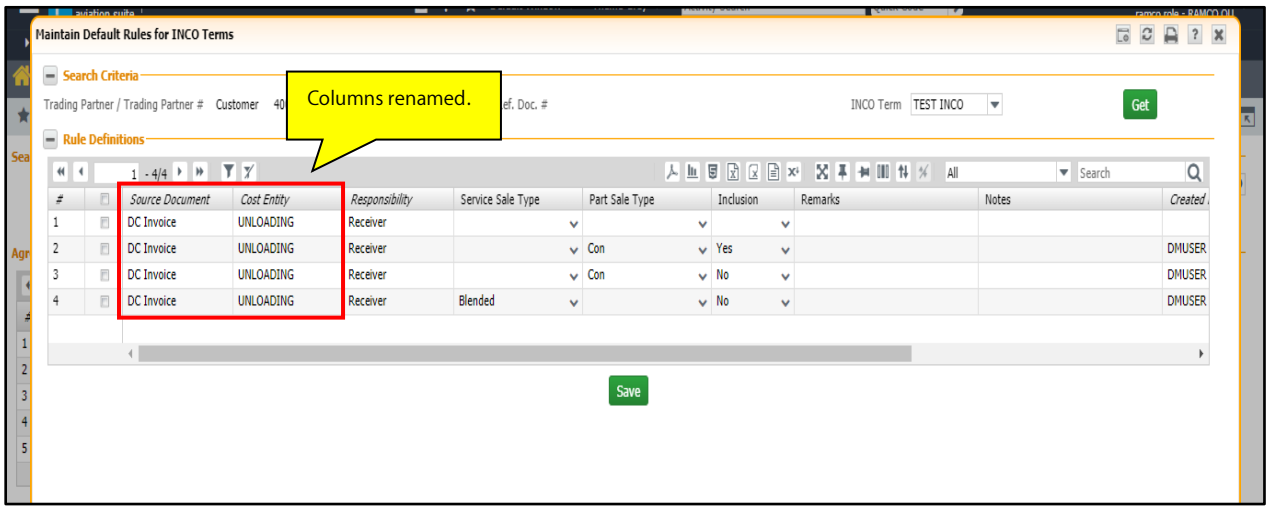


Exhibit 5:

Maintain Default Rules for INCO Terms screen in the **Customer** business component



Provision to enable processing of request amendments in CO hub

Reference: APRP-1333

Background

Currently, any amendment to a Customer Request for 'Advance Exchange' through revisions will be directly updated in the Customer Order, Exchange Order, Material Request or General Issue accordingly as applicable. There is no provision for the CSR to review the changes requested by the customer in case of requests already processed into an order. Hence the requirement is to have a provision to verify the revisions done to the customer request and process the same based on which the downstream documents needs to be updated.

This enhancement brings improvements in **Customer Order Management Hub** in the form of new tile addition 'Request Amend. Pend Processing' which will retrieve all the Requests which are revised and the revisions are yet to be processed. The amendment details will be shown in the Summary multiline and the user can Accept/Reject the amendment changes.

Change Details

1. A new parameter is added against the Preference for **Customer Order Management Hub** under the **Stock Management** business process > **User Preferences** component > **Manage Screen Default and Preferences** activity. (**Exhibit-1**)
    - Parameter for: Display Options
      Parameter: Show Request Amend. Pending Processing
      Permitted Value: Enter '0' for 'No', '1' for 'Yes'
        - ✓ If this is parameter is set as:
            a. No: Then 'Request Amend. Pending Processing' tile will not be displayed under 'Exception Toggle' bucket.
            b. Yes: Then 'Request Amend. Pending Processing' tile will be displayed under 'Exception Toggle' bucket.

2. A new tile '**Request Amend. Pend Processing**' is added in 'Exception Toggle' button under the **'Commercials Management'** business process > '**Customer Order Management Hub**' component > '**Customer Order Management Hub**' activity. (**Exhibit-2**)

    Note:
        a. All the Customer Requests against which latest revisions are available in 'Confirmed' status will retrieved under this tile.
        b. The Summary multiline will be same as available in all other existing tiles for 'Customer Request'.

3. New columns '**Amend. Info.**', '**Processing Exception**' & '**Amend. Processing Remarks**' are added in Request Summary Multiline which will be visible only under 'Request Amend Pend. Processing'' tile. (**Exhibit-2**)

- **Amend. Info**: Shows the details of the columns which are modified in the revision generated.
- **Processing Exception:** Displays the exceptions identified during processing of the request amendments.
  Ex: In case if during updating the changes requested in the revision of the request to the Customer Order, if there arises need for contract re-evaluation. This will shown as 'Contract Re-assignment' needed. Contract evaluation will be done and exception will be identified only on 'Accepting Amendments'.
- **Amend. Processing Remarks**: Any remarks provided by the user during processing of request amendments.

4. A new display-only control 'Rev. #' is added in the Summary multiline. This displays the Rev. # of that specific Customer Request. (**Exhibit-2**)

5. A new combo action button is added in **CO Hub** screen and should be visible only for tile 'Request Amend. Pending Processing'. (**Exhibit-2**)

   This Action combo loads with the following values:
   - **Accept Amend**. : The changes in the revision will be accepted and updated into the downstream documents.
   - **Reject Amend**. : The changes are not accepted and no further processing will be done.

6. A new hyperlink **'Request Rev. Info'**. control is added in 'Request Detail' band section.
   The value against the control will be shown as: (**Exhibit-3**)

   - **Exist-Pending**: If any of amended controls against Customer Request (Irrespective of revision) are yet to be Processed (Accept amend. / Reject Amend) that is., any of the revision of the request is available with 'Req. Processing Status' as 'Pending'
   - **None :** If the amendment is not made to Customer Request document (0th Revision of the Request)
   - **Exist-Processed:** If all the amended controls against Customer Request (Irrespective of the Revision) are already processed.

7. A new combo UI is displayed next to **'Request #**' above the 'Request Details' band. Combo will load all the revisions available against the request. On click of Request# hyperlink in 'Summary' multiline and this combo will be defaulted with the latest revision of the request and all the details will be retrieved accordingly. **(Exhibit-3)**

8. A new pop-up UI **'Manage Request Amendment Processing**' will be launched on click of the 'Request Rev. Info.' data hyperlink. The control level changes with respect to all the revisions of the request can be reviewed (in case of already processed revisions) or processed (in case of pending processing revisions). **(Exhibit-4).**

Note:

a. *Amendment Processing - after Threshold Event:*

   I. *Creation of new revision or processing of amendment is allowed only until Threshold Event is reached. In case of a Request with Request for 'Advance, the threshold event is: Issue has already been confirmed for at least one part against the exchange MR generated for at least one EXO genera rated from the Customer Request based Customer Order.*

b. *Acknowledgment/Reject against new Revision:*

   I. *The Acknowledgement Status against the request will be tracked at revision level. On acknowledging the new revision, an automatic mail will be sent to the customer for accepting the changes in the new revision.*

   II. *The Reject against the new revision will also trigger mail to the customer and the document status is updated accordingly (as per the existing functionality).*

c. *When a new revision of Customer Order is generated due to Customer Request Amendment, the 'Revision Comments' in respective Customer Order will be updated with the comment: 'Revision Auto generated on Customer Request Amendment'*

Exhibit 1:

Manage Screen Defaults Preference screen in the **User Preferences** business component

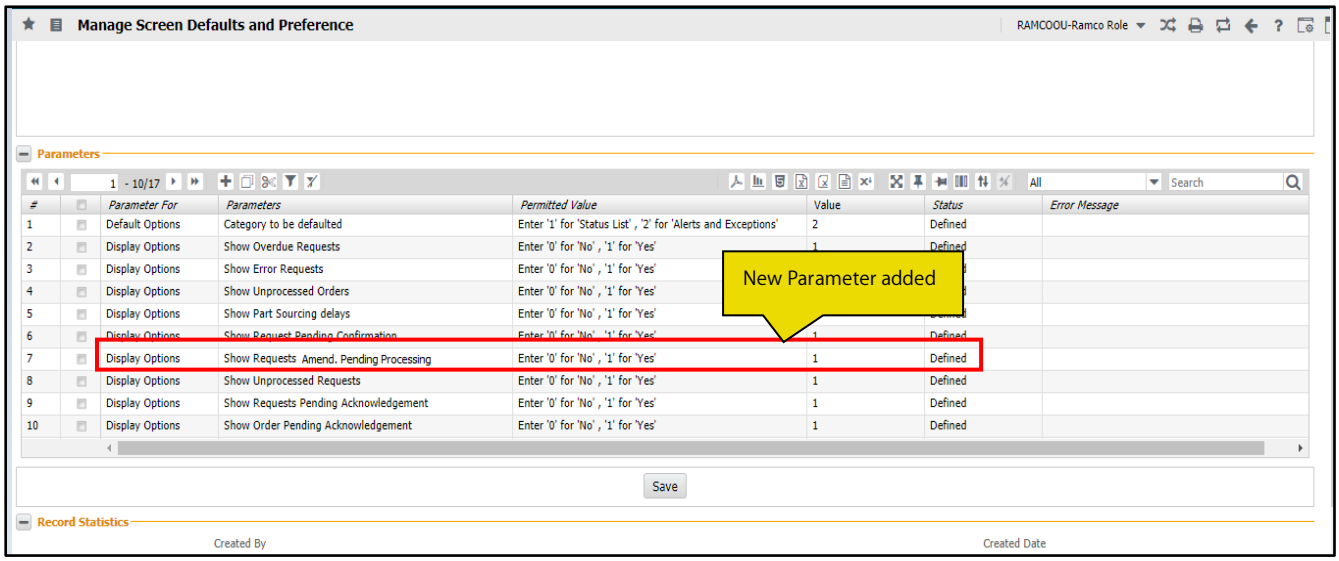


Exhibit 2:

Customer Order Management Hub screen

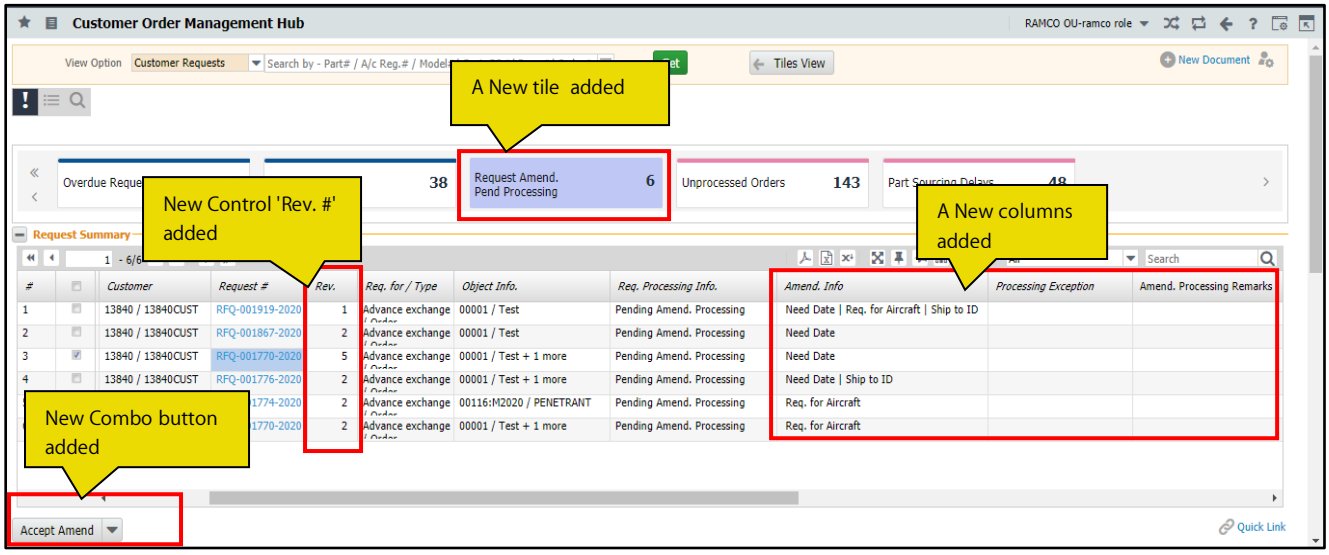


Exhibit 3:

Customer Order Management Hub screen

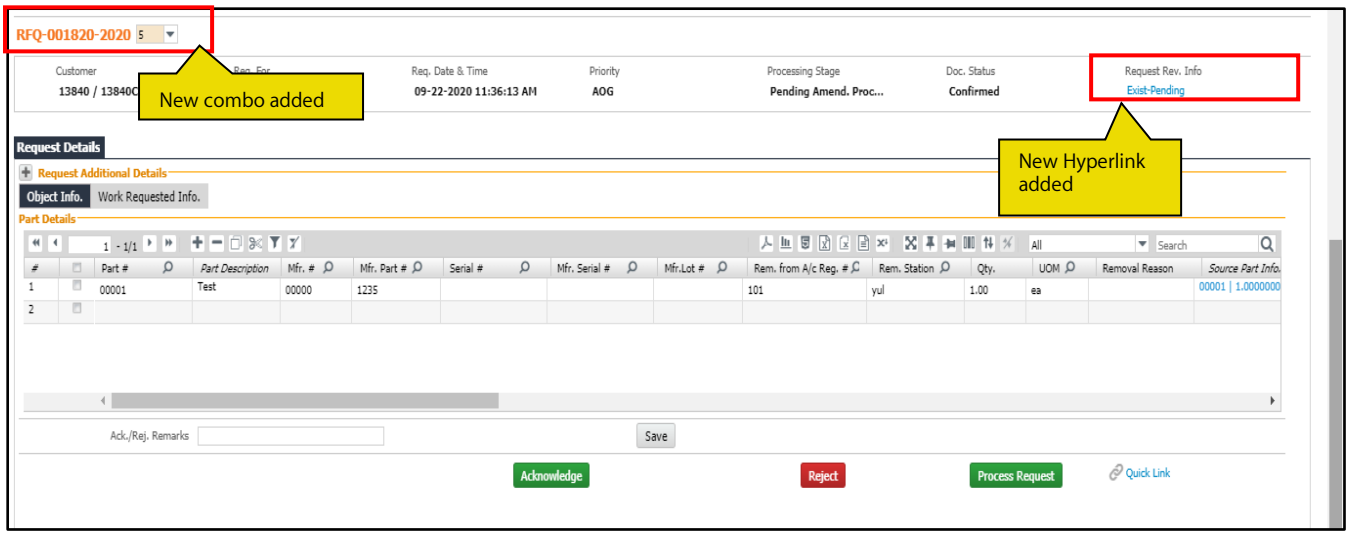
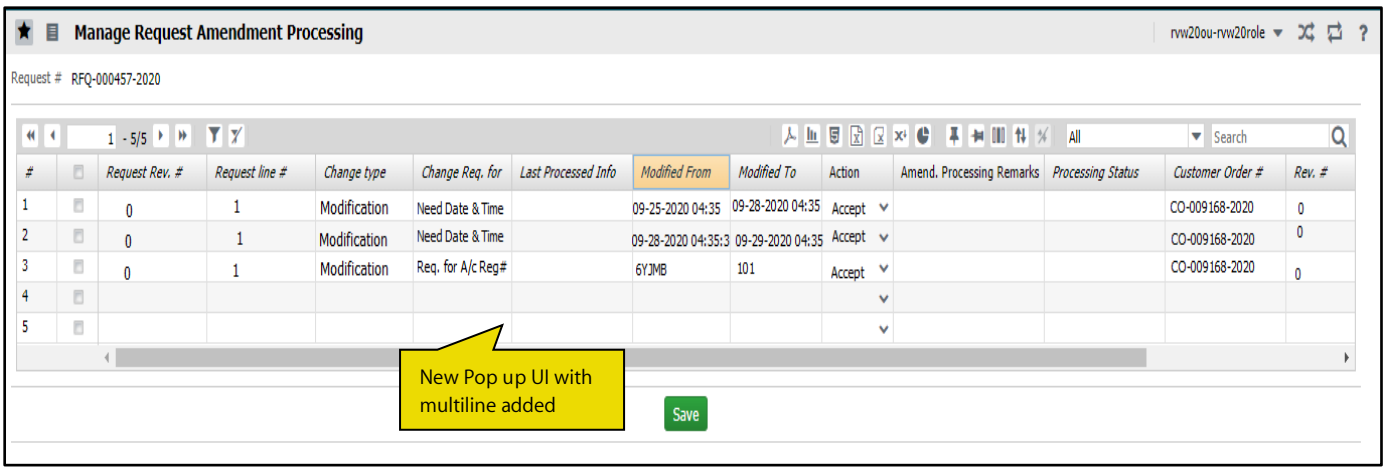


Exhibit 4:

Manage Request Amendment Processing UI - Customer Order Management Hub screen



WHAT'S NEW IN CUSTOMER ORDER MANAGEMENT HUB?

Provision to give suggestive inputs based on Smart fills in CO hub in Global search criteria

Reference: APRP-1155

Background

Currently, Elastic search criteria is introduced to search the 'Part #/ A/c Reg. #/ Model #/ Cust. PO. #/ Req.#/ Order #' details. So, on click of the 'Get' pushbutton, the value provided under global search criteria will be fetched under the Summary multiline. Once the global search is executed, there is no way to bring back the tiles other than refreshing the screen.

Hence the requirement is to have a provision to give suggestive inputs to search with Smart fills in global search criteria and addressing the traversal issue in CO hub after Global search is invoked.

This enhancement brings improvements in **Customer Order Management Hub** enabling Smart fills to global search filter in CO hub and providing an option to retrieve the 'Tiles View' which will bring back the Tiles along with Summary Details.

Change Details

1. Smart Fills will be enabled for the 'View Option' Watermark control in global search criteria. Based on the given input, smart fill will suggest the list of Requests / Orders. These smart fills will be enabled for both 'Customer Request', Customer Order' View option combo control.(**Exhibit-1**)
2. On select of the 'View Option' combo as 'Customer Request'/'Customer Order' the Elastic search field will be enabled with Smart fills for the following given inputs.
    - Document #
    - Job Type
    - Customer
    - Customer PO #
    - Object Info.
    - Priority
    - Due date
    - Status/Stage

Note:

1. *The user can select any search criteria in **Smart Fill** pop up or he can enter any value in global search and click on 'Get' pushbutton, but the system does not mandate the user to select the Smart fill results.*
2. On click of the 'Get' pushbutton, if the user has selected one specific Request/Order, that specific Request / Order will be fetched in the Summary grid and the respective request/order details section is also auto filled.
3. On click of 'Get' pushbutton, if the user continues with the entered criteria, all matching Requests/Orders will be fetched in Summary grid and no details will be fetched.

- A new button 'Tiles View' is added in Global search section next to the 'Get' button. (**Exhibit-2**).
  On click of 'Tiles View' button, the toggle section and the tiles section (tiles) which were hidden due to Quick Access search will be enabled and all the tiles view is displayed.

Exhibit 1:

Customer Order Management Hub screen in the **Commercials Management** business component

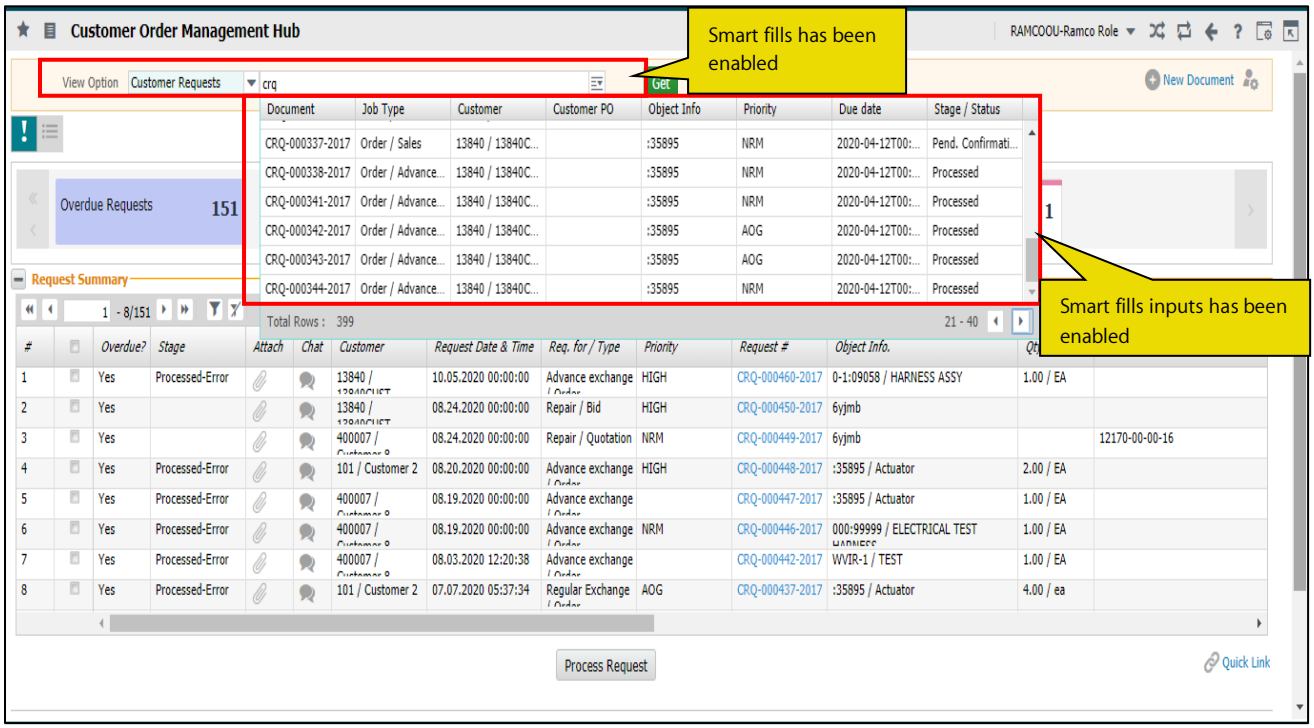
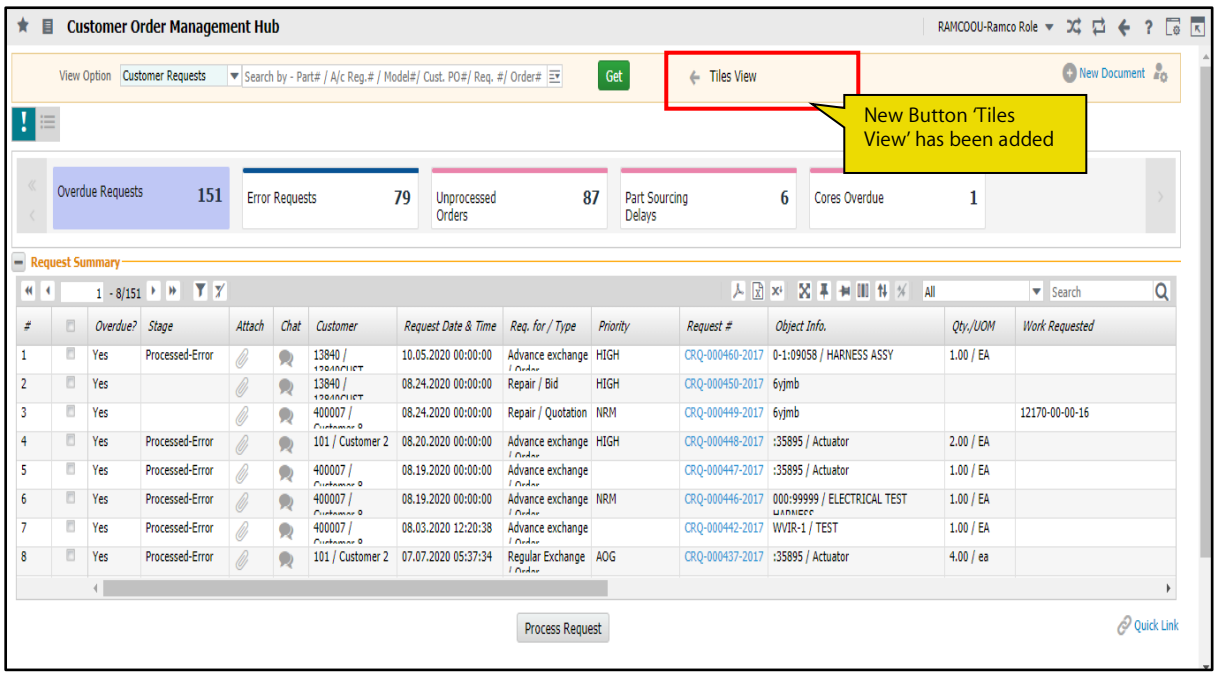


Exhibit 2:

Customer Order Management Hub screen in the **Commercials Management** business component



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