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RAMCO AVIATION SOLUTION

VERSION 5.9

USER GUIDE

CUSTOMER PORTAL

ABOUT THIS MANUAL

This manual briefly describes the basic processes and functions in Ramco Aviation Solution.

WHO SHOULD READ THIS MANUAL

This manual is intended for users who are managing the Aviation industry processes and are new to Ramco Aviation Solution.

This manual assumes that the user is familiar with the Aviation Industry nomenclatures and systems based software

HOW TO USE THIS MANUAL

Ramco Aviation Solution provides extensive Online Help that contains detailed instructions on how to use the application. Users are suggested to use this manual for specific references, along with the Online Help. This manual contains enough information to help the users perform the basic tasks and points toward the Online Help for more detailed information.

HOW THIS MANUAL IS ORGANIZED

The User Guide is divided into 4 chapters and index. Given below is a brief run-through of what each chapter consists of.

Chapter 1 provides an overview of the entire **Customer Login** business process. The sub processes are explained in the remaining chapters.

Chapter 2 focuses on the **Customer Portal** sub process.

The **Index** offers a quick reference to selected words used in the manual.

DOCUMENT CONVENTIONS

- The data entry has been explained taking into account the “Create” business activity. Specific references (if any) to any other business activity such as “Modify” and “View” are given as “Note” at the appropriate places.
- **Boldface** is used to denote commands and user interface labels.

  Example: Enter **Company Code** and click the **Get Details** pushbutton.
- Italics used for references.

  Example: *See Figure 1.1.*
- The icon is used for Notes, to convey additional information.

REFERENCE DOCUMENTATION

This User Guide is part of the documentation set that comes with Ramco Aviation Solution.

The documentation is generally provided in two forms:

- The Documentation CD in Adobe® Systems’ Portable Document Format (PDF).
- Context-sensitive Online Help information accessible from the application screens.

WHOM TO CONTACT FOR QUERIES

Please locate the nearest office for your geographical area from www.ramco.com for assistance.

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INTRODUCTION

The **Customer Portal** business component as part of the **Receivables Management** business process was evolved to enable customers of the MRO organizations to track their various orders and record the commercial and/or operational approvals, for improved TAT of the orders. With the help of the portal the customers get full visibility on the progress of their orders.

This visibility helps the customers to know the cost involved in the service of the Parts, so that the required approvals can be obtained in their organization, before the service agency starts performing the requested service.

CUSTOMER PORTAL

Customer Portal is a single screen with a consolidated view access to relevant data pertaining to various orders a customer gives to an MRO Organization. This screen is designed to view details of all such orders in one place. The customer can be informed of the status of the service or part sales order placed, current jobs, act on pending approvals and so on.

The customer has information regarding the exact shipment as there is a provision to review projected completion date, projected delivery date and actual work completion date. In addition the other features are as below:

<u>Features</u>

- Track status of current and completed jobs
- Review the parts that are ready for shipment
- Review recent shipment details
- Record commercial and / or operational approvals
- View information pertaining to parts pending to be shipped under the exchange core due
- View credit information are available

- Request for a quotation for the part or place an order
- Provision to review quote values and approve/reject a Quote. Also you can request for requote if the quote provided is not satisfactory
- Review the requests which are not yet processed and track the status of the raised sale orders

2.1 MAPPING LOGIN USERNAME TO A CUSTOMER FOR ACCESS TO CUSTOMER PORTAL

In order to give access to a particular customer to use Customer Portal, the customer must be registered within the application. This registered customer must have a username mapped with which the portal can be accessed. This Username can be provided in **Edit Customer Record** activity of the **Customer** business component under the **Sales Setup** business process.

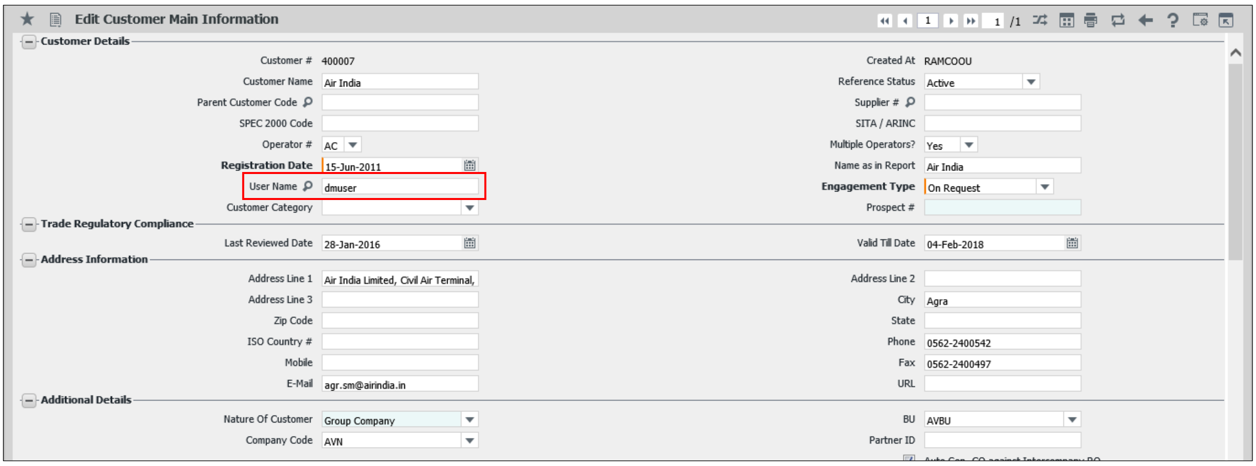

Figure 2.1 Mapping login name

2.2 USING THE CUSTOMER PORTAL

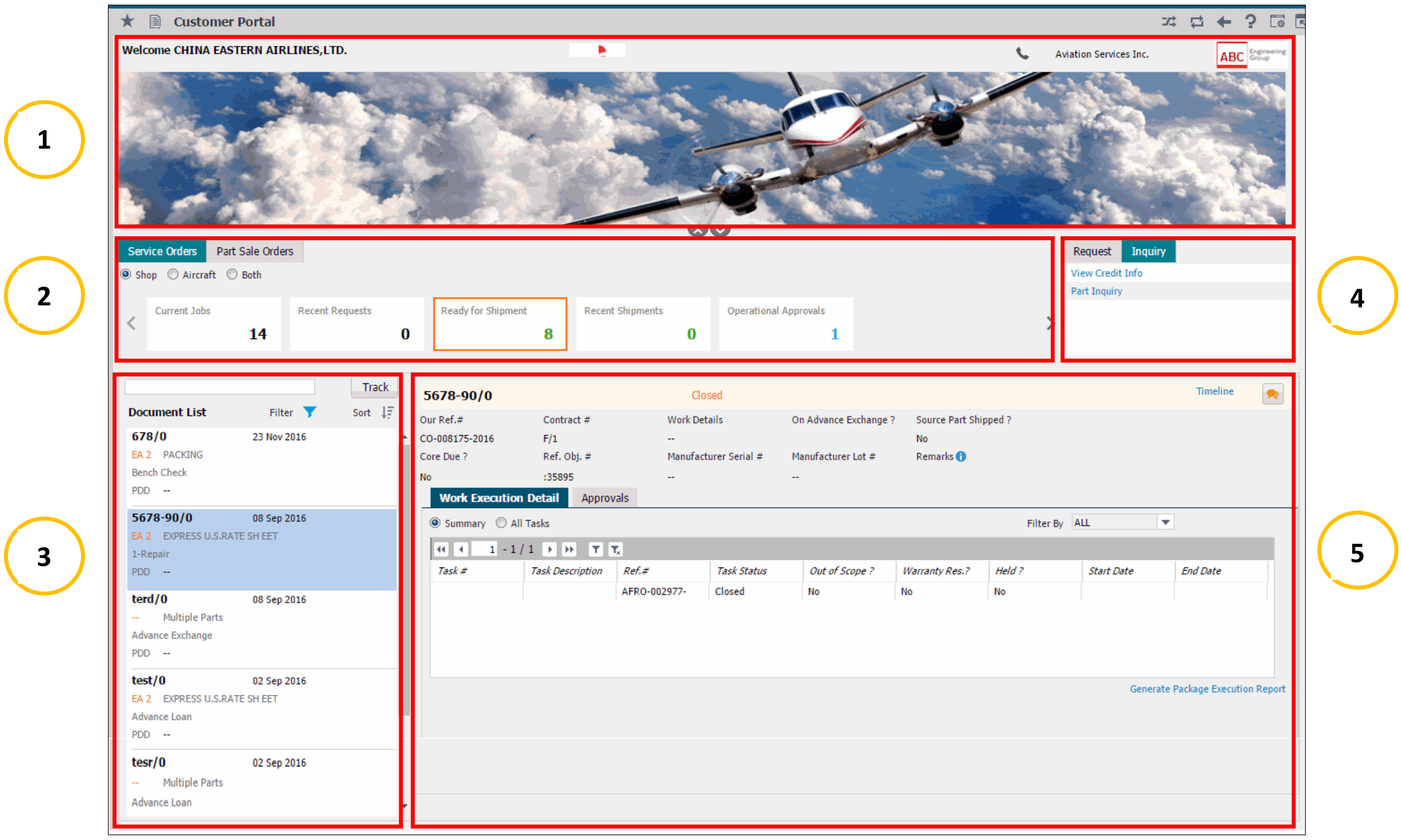

Figure 2.2 Customer Portal

1. **Customer Identification** and **Banner Section**

The Customer for whom the portal is launched is retrieved and displayed here from the user name specified in the **Customer** master.

Note that the user name is unique and cannot be mapped to multiple customers.

In this section, the customer logo that has been uploaded in the database is retrieved from the **Customer** master and displayed in the top section (center) of the portal. The MRO organization name and the contact information along with the logo to MRO organization is also provided in this section.

2.Title Section

This section displays the category of orders that can be viewed through the portal – Service Sale Orders and Part Sale Orders. Under each category, the count of the various orders open with the MRO organization, grouped under different categories are displayed. The count of orders for Service Sales can be viewed based on the following groups.

- Aircraft Orders
- Shop Orders
- Both

3.Order List Section

This section displays the orders pertaining to the count displayed in the different tiles in the portal. The orders in the list are retrieved on selection of any tile from the Tiles Section. You have the option to filter the desired order from the various orders using the Filter options available. Also, it is possible to sort the various orders listed. A single order can be retrieved by using the Track search with the Order # or Object.

4.Links Section

This section is divided into two groups as follows:

- **Request section**

  This section enables the user to request a quotation for the parts.

- **Inquiry Section**

  <u>Part Inquiry</u>

  This section is commonly used for part sales and enables the customer to check the stock availability before placing a request for an order/Quotation.

  <u>View Credit Information</u>

  This section facilitates the customer to view the credit information as well as details of account balance due

. **5.Order Detail Section**

This section displays the details of an Order selected from the Order list. The information displayed can be grouped into the following three categories.

- All document information shown at the Header
- Object information/Work information/Quotation details etc., shown in the multiline grid.

Collaborate Tool

This Collaborate  icon can be found in the top right corner of the **Order Detail Section**. This is a tool to collaborate, network and drive decisions. It has been designed to provide a document-linked discussion forum with a facility to attach and view notes. In this, the customer associated with a particular order and the MRO can discuss about the particular order.

Note that whenever a customer posts comments on a particular order, the user will receive a notification automatically regarding the comments posted.

2.3 MANAGING CUSTOMER PORTAL

This activity enables the customers to track orders and record approvals. To enable these activities the portal contains various sections and tabs. The two broadly classified sections are Service Orders and Part Sale Orders.

2.3.1 MANAGING CUSTOMER PORTAL

1. Select the **Customer Portal** activity in the **Customer Portal** business component. The **Customer Portal** screen appears. *See Figure 2.3.*

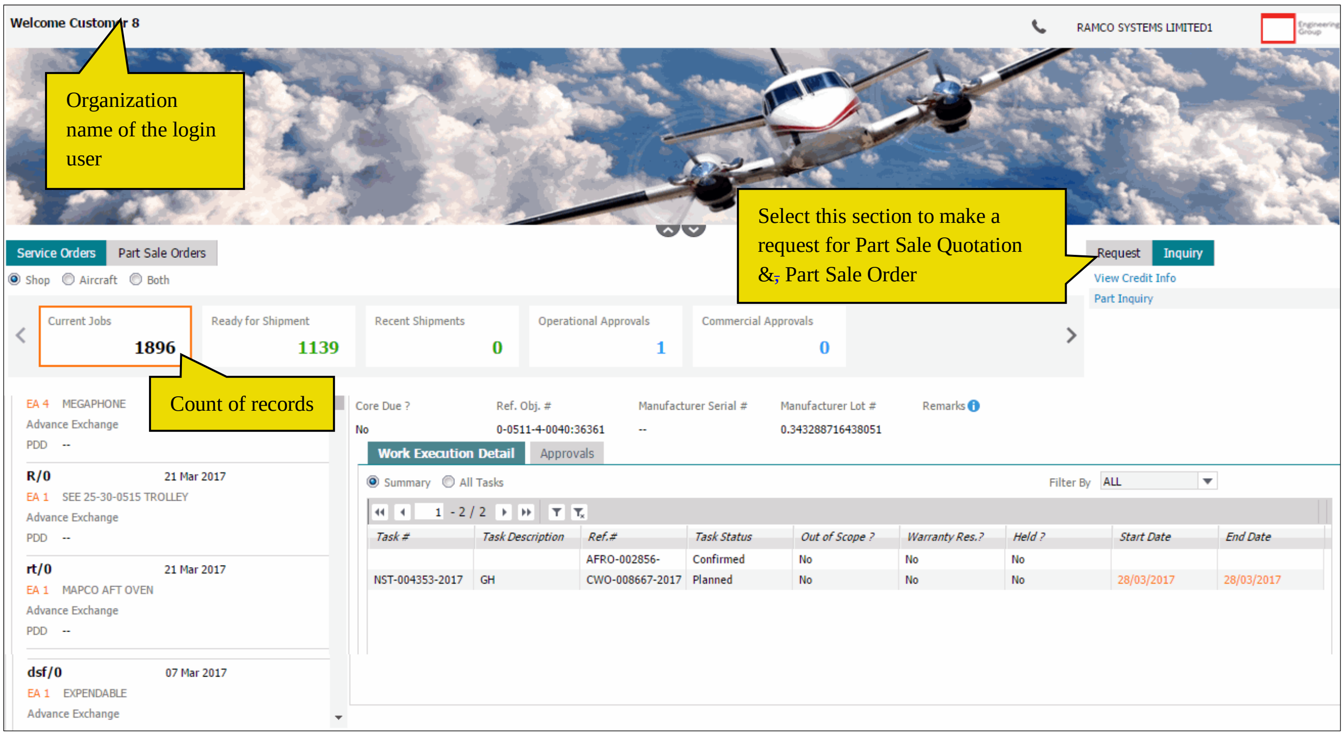

Figure 2.3 Customer Portal

2. Select the Service Orders tab to retrieve details pertaining to parts / aircrafts given for service.
3. Select the Part Sale Orders tab to retrieve part sale details.
4. Select the Request link section to make a request for Part Sale quotation and Part sale order.
5. Select the Inquiry link section to view credit information of the customer and part availability.

2.3.2 VIEWING SERVICE ORDER DETAILS

The system by default displays the **Service Orders** tab on launch of the Customer Portal screen.

1. Select the **Service Orders** tab in the **Customer Portal** screen in the **Customer Portal** business component. The Service Orders tab page appears. *See Figure 2.4.*

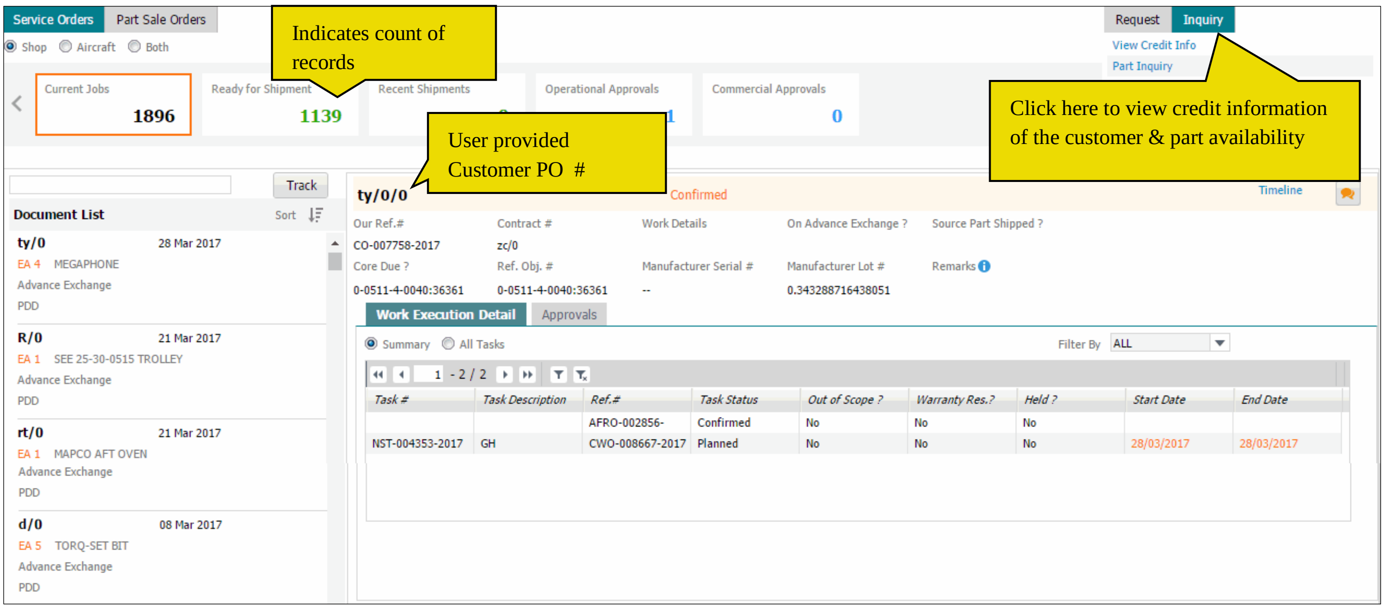

Figure 2.4 Service Orders tab

2. Select the **Shop** radio button to retrieve details of component jobs, **Aircraft** radio button to retrieve Aircraft -job details and **Both** radio button to retrieve both component and Aircraft jobs.
3. Select any of the **Current Jobs**, **Ready for Shipment**, **Recent Shipments**, and **Operational Approvals**, **Commercial Approvals** or **Exchange Core Due** cards to retrieve the relevant work order details in the multiline.
4. Select a record from the **Document List** on the left side of the screen to view the details of the work order or package in the adjacent section.
5. Use the Filter or Sort options to retrieve the required documents. Track will help in retrieving the documents based on entered Customer Order # or Aircraft Reg./Part #
6. Select the Work Execution Detail tab to retrieve details of work orders at task level.
7. Select the Approvals tab to record operational or commercial approval against an order / package, if any.

Reviewing work execution details

This section enables you to retrieve tasks and status of work orders task wise.

1. Select the **Work Execution Details** tab in the **Service Orders** section of the **Customer Portal** business component. The Work Execution Details tab page appears. *See Figure 2.5.*

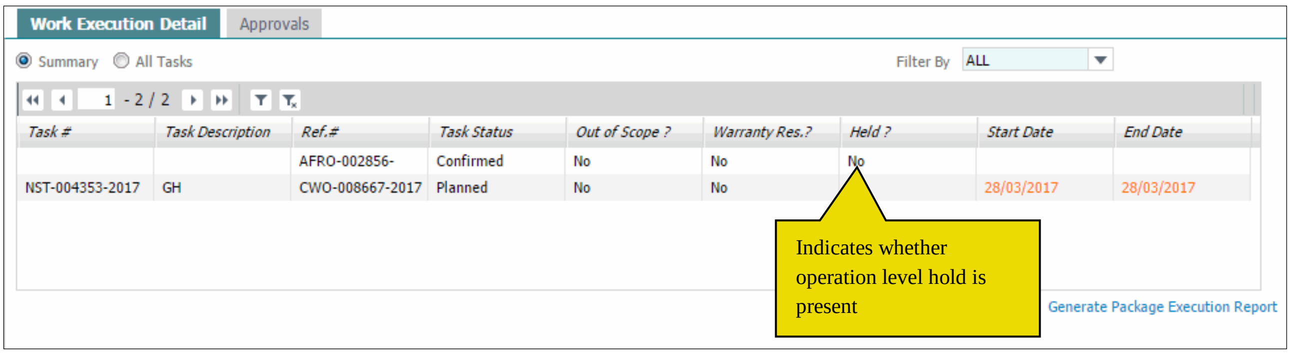

Figure 2.5 Service Sale Orders – Work Execution details

2. Select the **Summary** radio button if you wish to retrieve the main task details or select the **All Tasks** radio button to retrieve tasks at child level.

*Note: The **Start Date** and **End Date** columns will show the Planned Dates for the Task if the Task is not yet executed, if executed, then these columns will show the actual dates.*

Recording approvals

This tab enables you to record Operational approval or commercial approval against an order / package.

1. Select the **Approvals** tab in the **Service Orders** section of the **Customer Portal** business component. The Work Execution Details tab page appears. *See Figure 2.6.*

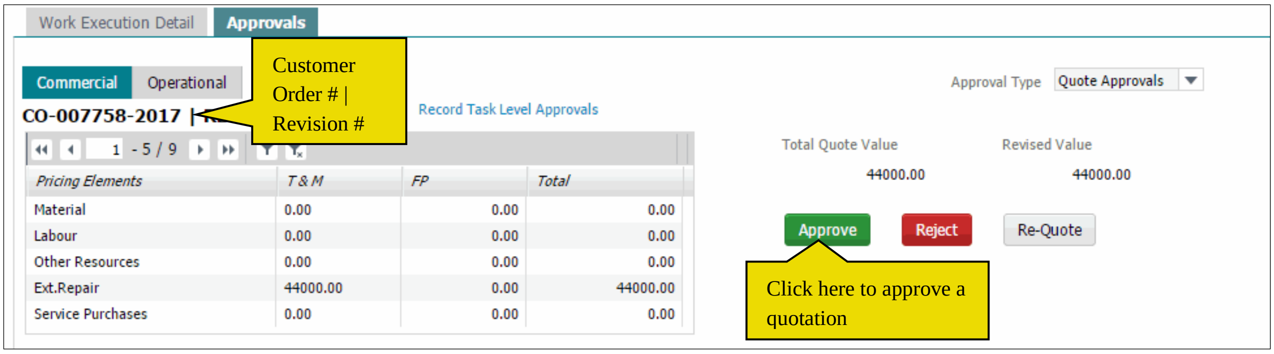

Figure 2.6 Approvals tab – Commercial Approval

2. Select the Commercial tab for commercial approvals of a work order or package.
3. Select the Operational tab for Operational Approvals of a work order or a package.

Note: The same order may be listed in both Current Jobs tile as well as Operational Approvals & Commercial Approvals tile as an open job could be on hold due to pending approval from Customer.

Recording Commercial Approvals

1. Select the **Commercial** tab in the **Approvals** section of the **Customer Portal** business component. The Commercial tab page appears. *See Figure 2.7.*

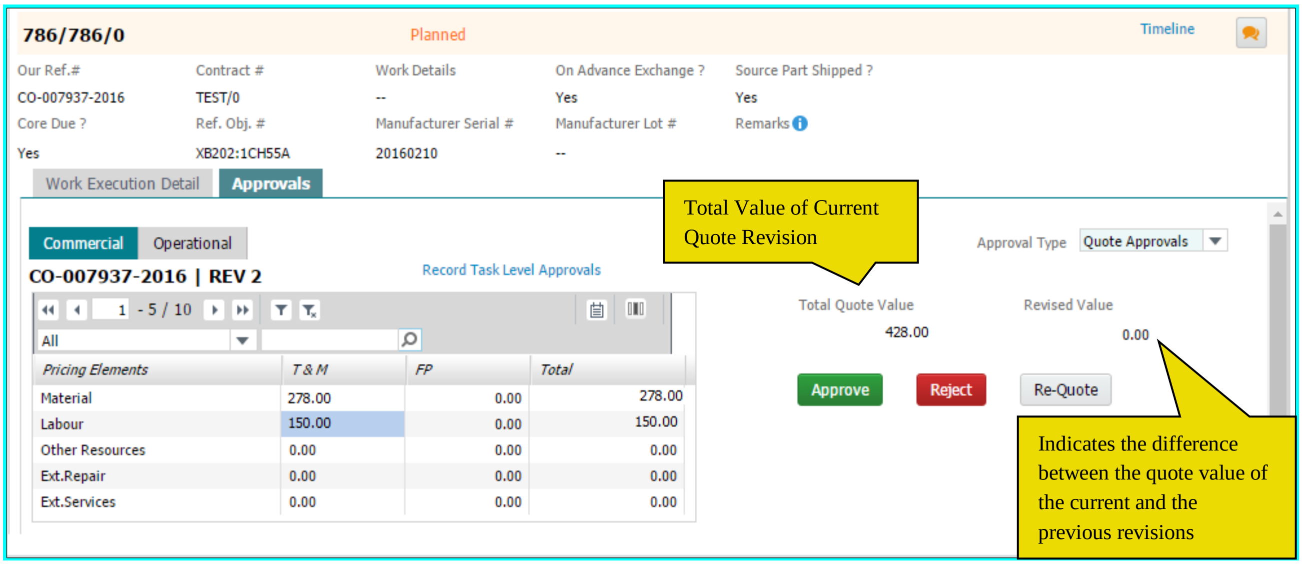

Figure 2.7 Approvals tab – Operational Approval

2. Use the **Approval Type** drop-down list box to specify the type of commercial approval for the given work order.
3. Select the **Approve** pushbutton to approve the quotation.
4. Select the **Reject** pushbutton to reject the quotation.

5. Select the **Re-Quote** pushbutton for re-quotation.
6. Select the **Record Task Level Approvals** link to record approval/rejections at individual Task level.

Recording Operational Approvals

1. Select the **Operational** tab in the **Approvals** section of the **Customer Portal** business component. The Commercial tab page appears. *See Figure 2.8.*

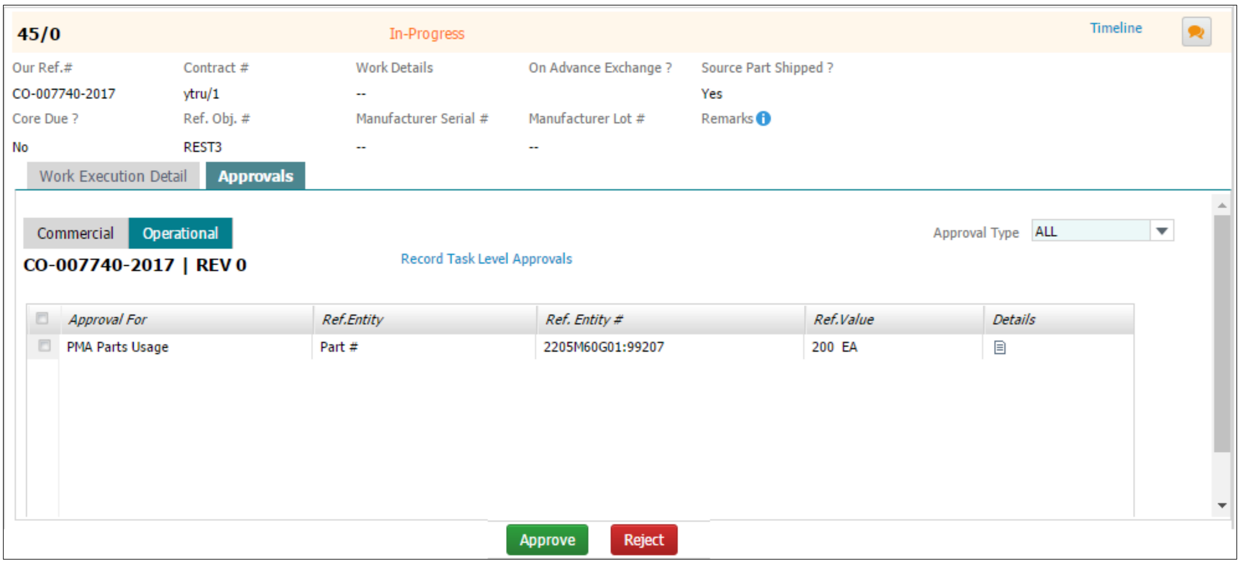

Figure 2.8 Approvals tab – Operational Approval

2. Use the **Approval Type** drop-down list box to specify the type of approval for work order / package.
3. Select the **Approve** pushbutton to accept the commercial / operational approvals.
4. Select the **Reject** pushbutton to reject the commercial / operational approvals.

2.3.3 VIEWING PART SALE ORDER DETAILS

1. Select the **Part Sale Orders** tab in the **Customer Portal** screen in the **Customer Portal** business component. The Part **Sale Orders** tab page appears. *See Figure 2.9.*

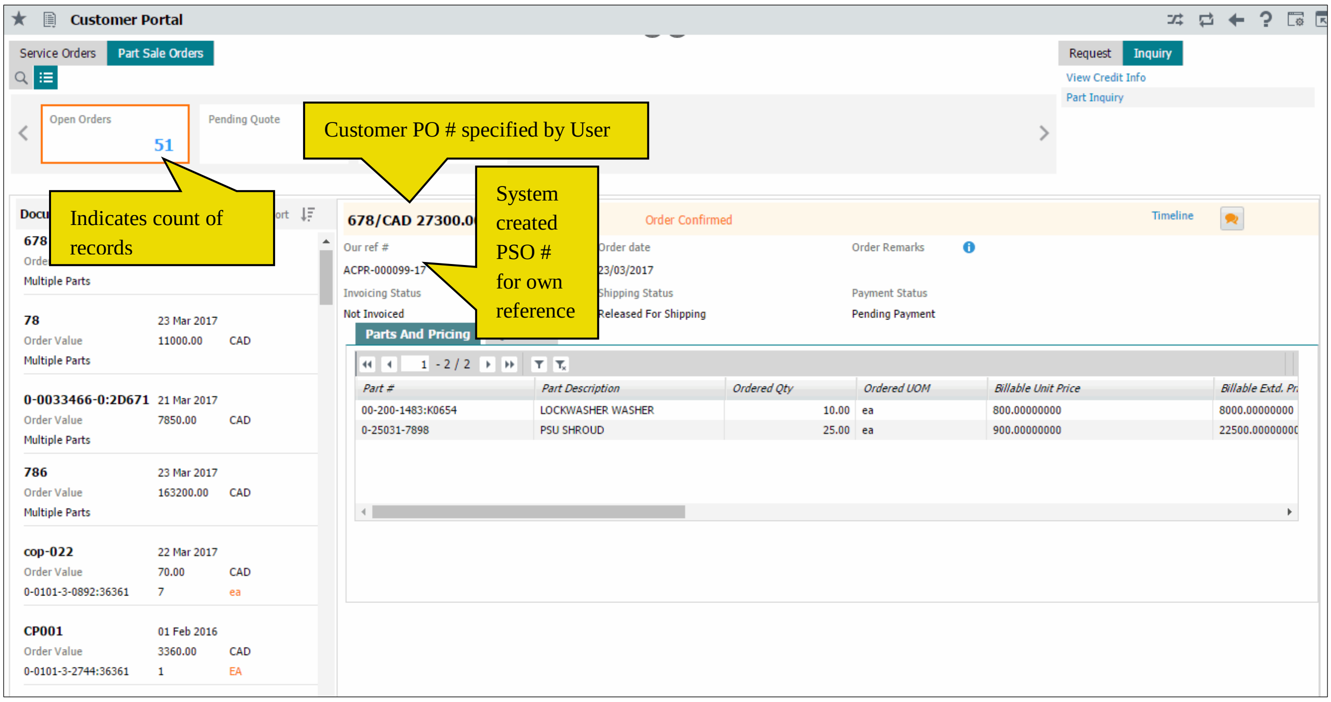

Figure 2.9 Part and Pricing Details

2. Select any of the **Open Orders**, **Pending Quote, or Request Pending** cards to retrieve the relevant work order details in the multiline.
3. Select a record from the **Document List** on the left side of the screen to view the details of the request/order placed.
4. Select **the Parts and Pricing** tab to retrieve details of the part sale order.
5. Select the **Quotation** tab to retrieve details of the quotation.

Viewing part sale order details

1. Select the **Parts and Pricing** tab in the **Part Sale Order section** of the Customer **Portal** activity in the Customer Portal business component. The **Parts and Pricing** tab page appears. *See Figure 2.10.*

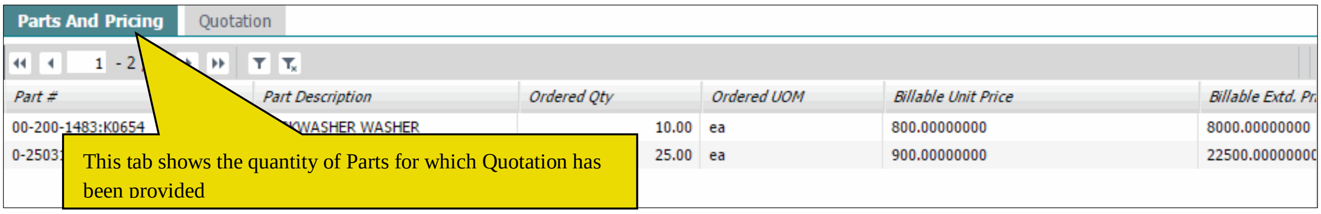

Figure 2.10 Part Sales – Pre-Order Quotation

Viewing quotation details

1. Select the **Quotation** tab in the **Part Sale Order section** of the Customer **Portal** activity in the Customer Portal business component. The **Parts and Pricing** tab page appears. *See Figure 2.11.*

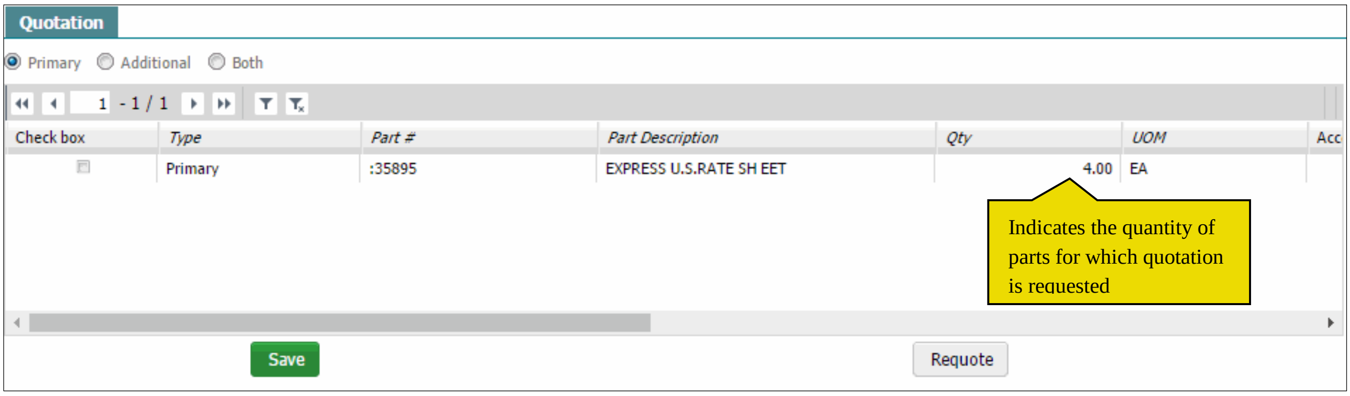

Figure 2.11 Part Sale Orders

6. Quotation tab under Open Orders tile will list the Approved quote details against which the Part Sale Order was created.

Recording Approvals for Quotations

1. The quote provided against each order can be reviewed under the **Quotation** tab from the “Pending Quote” tile
2. Click on **Primary** radio button to view the Primary Quotation given by MRO organization for the requested parts
3. Click on **Additional** radio button to view any additional quotation provided by MRO organization on any Alternate Parts.
4. Click the **Both** radio button to view both Primary and Additional quote details
5. Select **Accept**/**Reject** in **Action** combo by providing the Accepted Qty.
6. Click on **Requote** button to request for a revised quote.

Reviewing pending requests

Note that all the pending Part Sale Requests that the customer has raised but have not yet been quoted or converted into an order will be listed here.

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Corporate Office and R&D Center

RAMCO SYSTEMS LIMITED

64, Sardar Patel Road, Taramani,
Chennai – 600 113, India

Office : + 91 44 2235 4510 / 6653 4000

Fax : +91 44 2235 2884

Website : www.ramco.com