ramco

RAMCO AVIATION SOLUTION

VERSION 5.9

USER GUIDE

PART SALE MANAGEMENT

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 AviationSolution. 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 **Part Sale Management** business process. The sub processes are explained in the remaining chapters.

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

Chapter 3 dwells on the **Part Sale Order** sub process.

Chapter 4 dwells on the **Pre-Order Quotation** 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.

contents

ramco

1 INTRODUCTION..5

2 CUSTOMER REQUEST 7

2.1 CUSTOMER REQUEST 8

2.1.1 DEFINING NUMBERING TYPE FOR CUSTOMER REQUEST..8

2.1.2 MAPPING THE NUMBERING TYPE..8

2.1.3 SETTING OPTIONS FOR SALE ORDER..9

2.1.4 CREATING CUSTOMER REQUEST..9

2.1.5 MANAGING CUSTOMER REQUEST..10

2.1.6 CREATING REQUEST FOR SALES 11

2.1.7 CREATING REQUEST FOR REPAIR..12

2.1.8 RECORDING WORK SCOPE INFORMATION..12

3 PART SALE ORDER..13

3.1 MANAGING PART SALE ORDER 14

3.1.1 Recording customer detail 15

3.1.2 RECORDING PART INFORMATION..16

3.1.3 RECORDING TCD INFORMATION 16

4 PRE-ORDER QUOTATION..18

4.1 MANAGING PRE-ORDER QUOTATION 19

4.1.1 RECORDING PRIMARY QUOTATION 19

4.1.2 RECORDING PRIMARY QUOTATION 20

4.1.3 RECORDING ADDITIONAL QUOTE DETAILS 21

4.1.4 RECORDING TCD DETAILS 22

4.1.5 RELEASING THE QUOTATION FOR CUSTOMER APPROVAL..22

4.1.6 ACCEPTANCE / REJECTION OF QUOTE..23

Index 25

INTRODUCTION

In the Aviation MRO industry, just as in any other service industry, the Part Sales process has a part of its revenue from sale of parts. In some MROs, this process forms a majority of the revenue generation. The Part Sale Process includes Request for Quotation, Process a Quotation and Sale Order against which parts are shipped.

The **Part Sale Management** business process has evolved to efficiently manage the activities of such part sale process, some of which includes the following:

1. Record Customer's Request for Quotation
2. Record a Sale Quotation for the Parts off on Sale
3. Raise a Sale Order
4. Ship Parts against a Sale Order
5. Invoice Customers against a Sale Order. This BPC includes the following sub processes:

Customer Request

This component has the **Manage Customer Requests** activity which enables the user to raise a request for quotation.

Part Sale Order

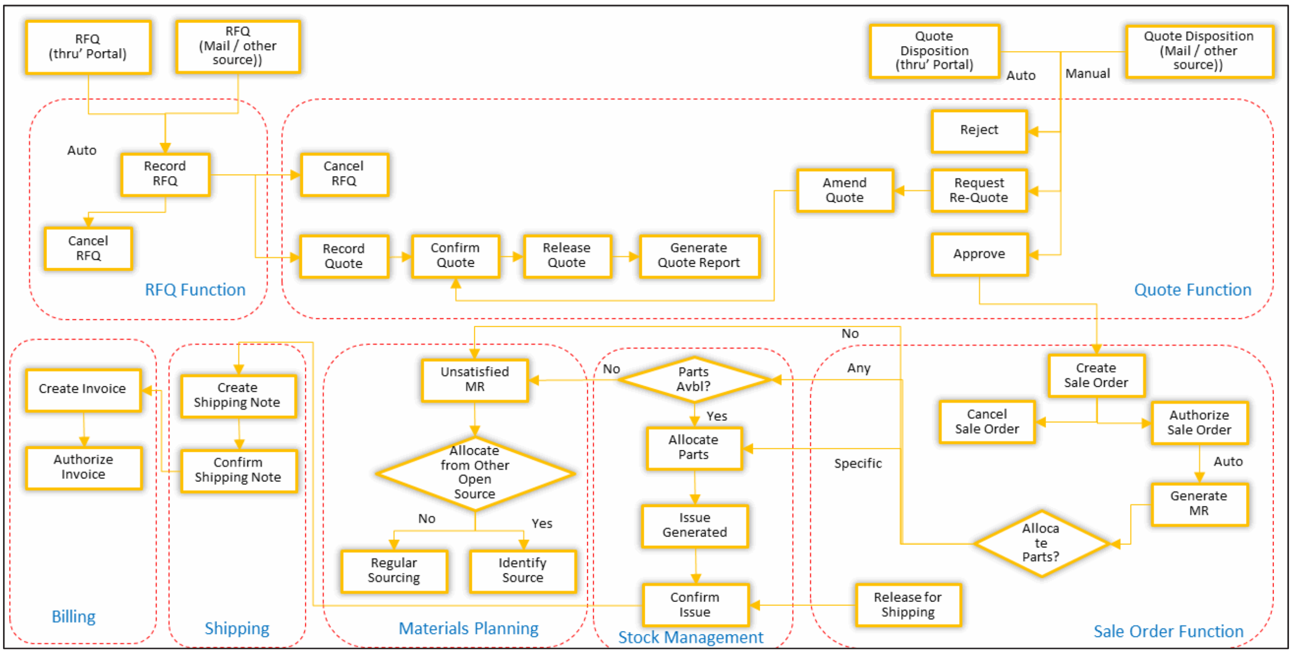
A part sale order contains comprehensive information on the various terms and conditions that needs to be followed for having the sale established.

Pre-Order Quotation

This activity enables the generation of a Pre-Order Quotation document, which can e processed into a Sale Order.

Note: The shipment of Parts will be managed in the isting Stock Issue framework and the Invoicing process will be managed in line with the Part Sale Packslip Invoice.

Part Sales Process Flow



CUSTOMER REQUEST

The **Customer Request** business component enables the users to raise a request for Sale Order or a Quotation for a Sale. This is the first step in the part sale process where the customer sends a request to all the vendors offering the part. Against this quotation, the vendors send back the price in which they could off the requested part.

A Customer Request for Quotation contains all the information varying from the Parts required, the date in which the part is required, and the place where the Part is to be shipped and so on.

You can also launch this activity directly from the **Customer Portal** business component in the **Receivables Management** business process to facilitate the customers to directly record the request instead of conveying the information to the vendor whose CSR then raises a Customer Request on customer's behalf.

Additional Features

- Raise a request as a new Prospect (i.e.) Customer who is not registered in the system as regular and register the contact details in the Request itself.
- Request for Quotation for parts not defined in the system.
- Check the Part Availability before raising an RFQ.
- Mention Expected Delivery Date in the requests.
- Define contact details valid only for this transaction for existing customers.
- Modify already created customer requests that are not confirmed yet.
- Provide the Terms and Conditions for Shipment.

2.1 CUSTOMER REQUEST

This activity enables you to record and manage request for quotation or an Order by a customer. Also, an already created request details can be modification in this page.

2.1.1 DEFINING NUMBERING TYPE FOR CUSTOMER REQUEST

1. Select **Create Numbering Type** activity under the **Document Numbering Class** business component of the **Inventory Setup** business process. The **Set Sales Process Parameter** page appears. See Figure 2.1.

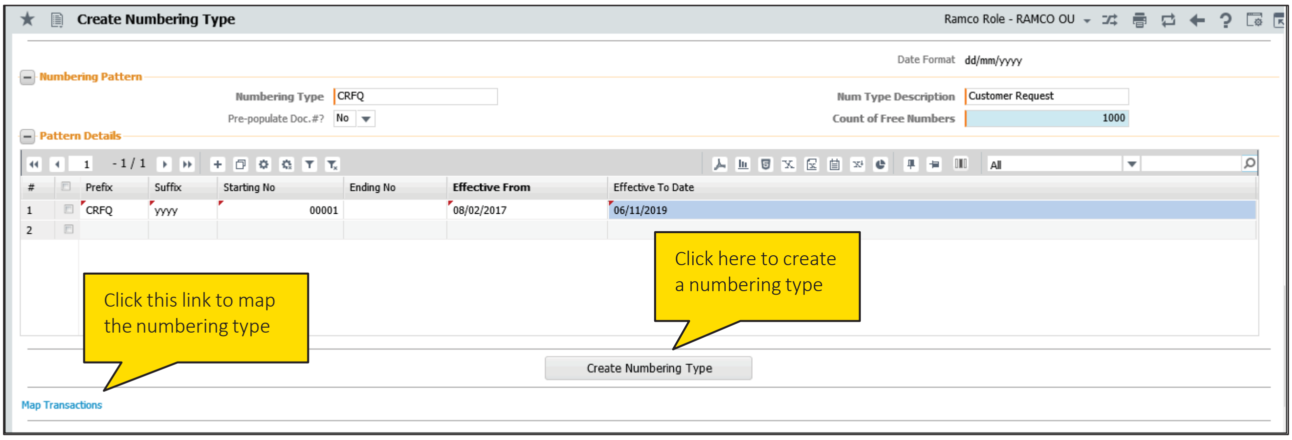


Figure 2.1 Defining numbering type

2. Enter a code in the **Numbering Type** to identity the numbering type you wish to create.
3. Enter a textual description of the numbering type in the **Numbering Type Description** and provide the other details.
4. In the **Part Details** multiline, provide the details like prefix and suffix for the numbering type.
5. Enter the date starting from which the numbering type must be effective in the **Effective From** column.
6. Click the **Create Numbering Type** to create the numbering type.

2.1.2 MAPPING THE NUMBERING TYPE

1. Select the **Map Transaction** link at the bottom of the **Create Numbering Type** screen. The **Map Transaction** page appears. *See Figure 2.2.*

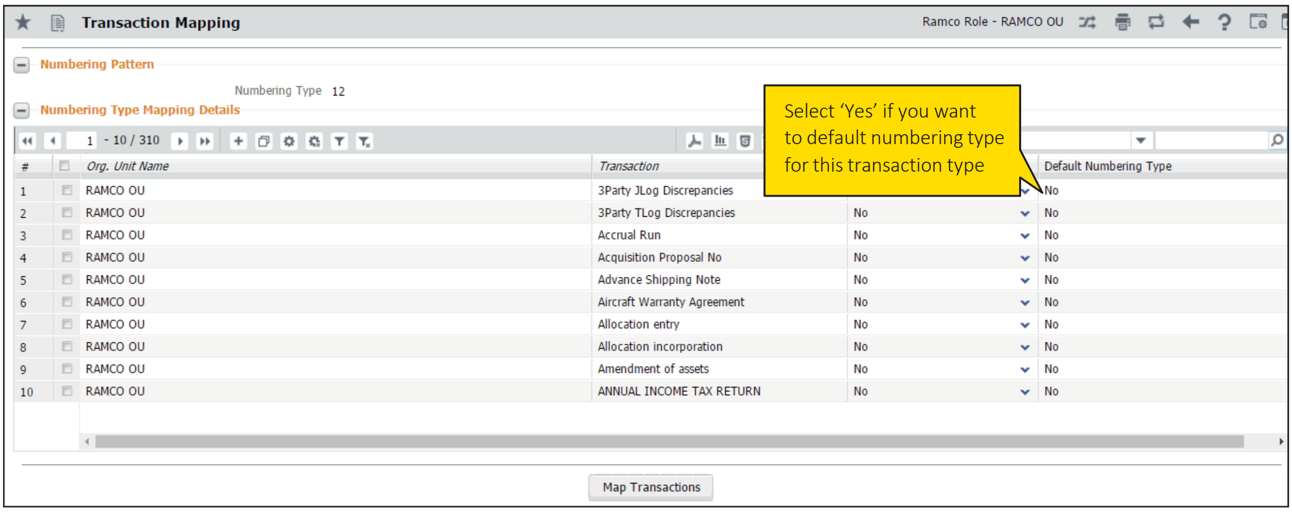


Figure 2.2 Mapping the numbering type

1. In the **Numbering Type Mapping Details** multiline, select the Transaction Type 'Request #' to which the numbering type is to be mapped.

2. Use the **Applicable** drop-down list box to specify "Yes" if you wish to map the numbering type to the transaction in the organizational unit.
3. Use the **Default Numbering Type** drop-down list box to specify whether the numbering type must be defaulted for **the transaction type.**
4. Click the **Map Transaction** pushbutton to map the numbering type to the transaction type of a particular organization unit.

2.1.3 SETTING OPTIONS FOR SALE ORDER

1. Select **Set Sales Process Parameters** activity under the **Customer** business component. The **Set Sales Process Parameter** page appears. *See Figure 2.3.*

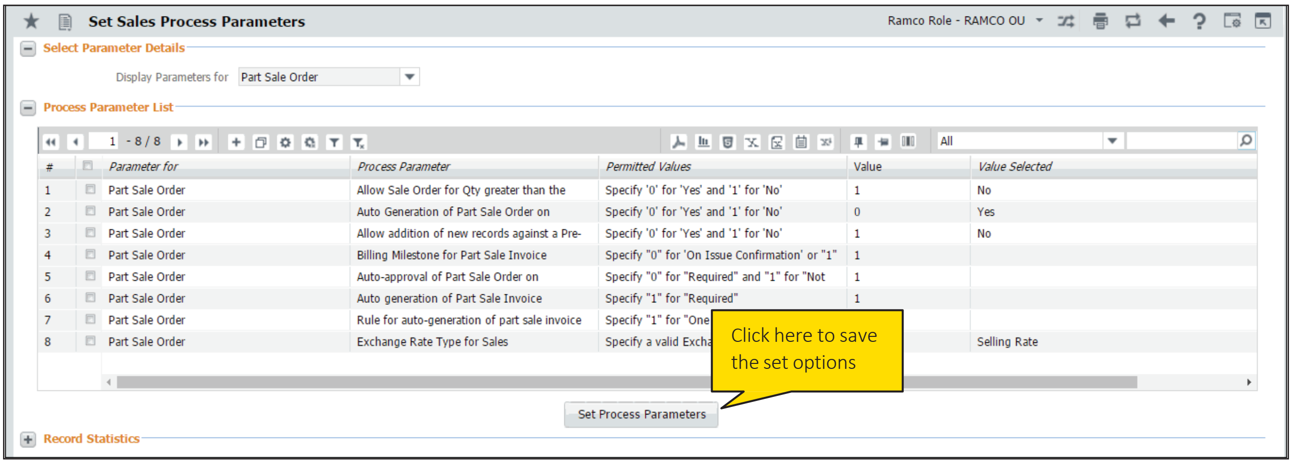


Figure 2.3 Setting Sales Parameters

1. Select Part Sale Order from the **Display Parameters For** drop-down list box.
2. Define the values for each of the parameter in the Process Parameter List multiline.
3. Click the **Set Process Parameters** pushbutton to set part sale order parameters.

2.1.4 CREATING CUSTOMER REQUEST

Customer request for a registered customer

1. Select **Customer Portal** activity under the **Customer Portal** business component of the **Receivables Management** business process. The **Customer Portal** page appears. *See Figure 2.4.*

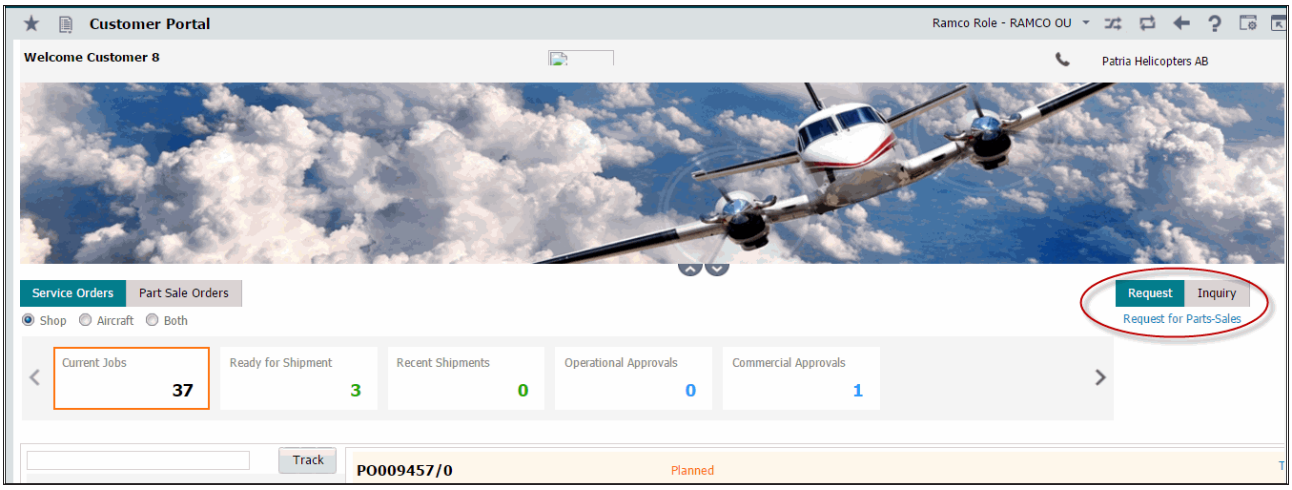


Figure 2.4 Setting Sales Parameters

2. Select the **Request** tab. The system displays the **Request For Part Sales** Link below the **Request/Inquiry** tabs.

3. Click the **Request For Part Sales** link to go to the **Manage Customer Request** screen.

Customer request for a prospect customer or new customer

4. Select **Manage Customer Request** activity under the **Customer Request** business component. The **Customer Request** page appears. *See Figure 2.5.*

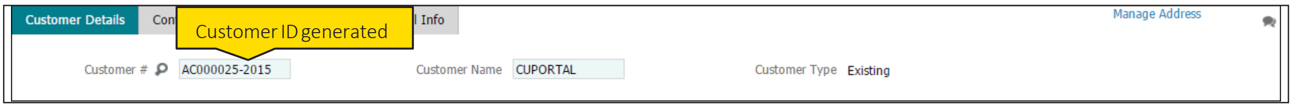


Figure 2.5 Request for Prospect Customer

5. Enter the **Customer Name** in the 'Customer Details' section
6. Press <**Enter>**

The system generates a Customer ID

2.1.5 MANAGING CUSTOMER REQUEST

1. Select **Manage Customer Request activity** under the **Customer Request** business component. The **Manage Customer Request** page appears. *See Figure 2.6.*

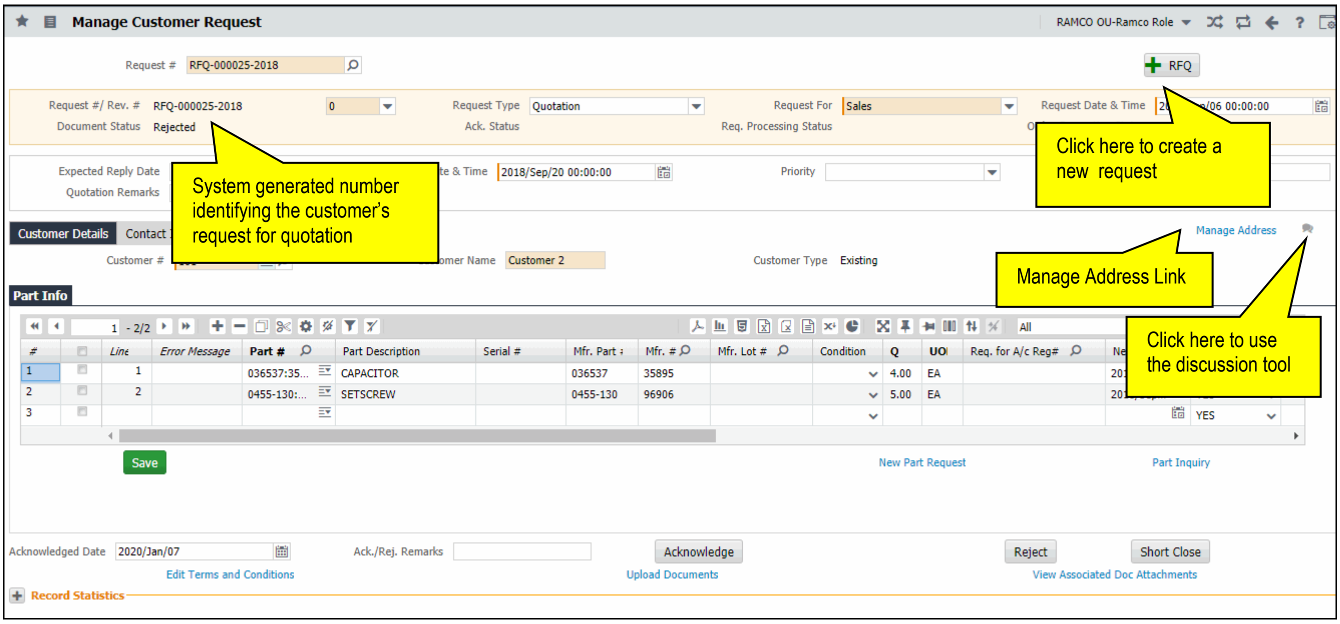


Figure 2.6 Managing customer request

2. Enter the **Request # / Rev. #** identifying the customer's request / revision that has been created already.

   ✍ *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.*

3. Click the + RFQ icon to clear the details entered in order to enable creation of a new document.
4. Use the **Request For** drop-down list box to specify the need for which the customer request was made.
5. Enter the date on which the customer request was made in the **Request Date & Time**. The system displays the current system date in this field.
6. Enter the **Customer #** for whom the request is being raised.

   ✍ *Note: The system automatically populates the Customer # if this screen is launched from the Customer Portal.*

7. Press <**Enter**> after providing the Customer #. The system defaults address from the Customer Master. However, if the customer is not a registered customer, enter the **Customer Name** and Press <**Enter**>, the system generates a unique **Prospect ID**.

8. Select the **Manage Address** link on the right side of the screen to define the contact address for new customer or view contact details of an existing customer.

   To Record Customer Details,

9. Enter Customer # and Customer Name who has raised the request in the Customer Details button bar

10. In the Contact Info button bar provide the Contact Address ID and the point of contact for the customer

    pertaining to the Address ID in the **Contact Person** field.

11. Enter the **Address ID** to which parts are to be shipped and the **Contact Person** pertaining to the Address ID in the **Shipment Info** button bar.

12. In the **Additional Info** button bar, specify the **Category** of the Customer Request and enter **Request SLA Category** along with the **Request Purpose**, **Request Source** and other details.

    In the Part Info tab,

13. Enter Part Details for which the Request is being raised for.

14. Select the **Check Part Availability** link to check the availability of the requested part in stock.

15. Click the **Save** pushbutton to save the details recorded.

    ✍ *Note: On particular settings, the system automatically processes, on confirmation Customer Requests from either part sales, repair or exchange into Orders.*

16. Click the **Acknowledge** pushbutton to acknowledge the customer request and update the status of the CR as “Acknowledged”.

17. Click the **Confirm** pushbutton to confirm the status of the customer request document.

18. Click the **Reject** pushbutton to reject the customer request.

19. Click the **Short Close** pushbutton to short close the Customer Request.

    ✍ *Revision/Short Closure of the Request will be allowed only until 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.*

20. Click the **Cancel** pushbutton to cancel the customer request, if not required.

2.1.6 CREATING REQUEST FOR SALES

1. Select **Manage Customer Request** action under the **Customer Request** business component. The **Manage Customer Request** page appears. *See Figure 2.7.*

2. Use the **Request For** drop down list box and select **Sales**. The system displays the **Part Info** tab by default.

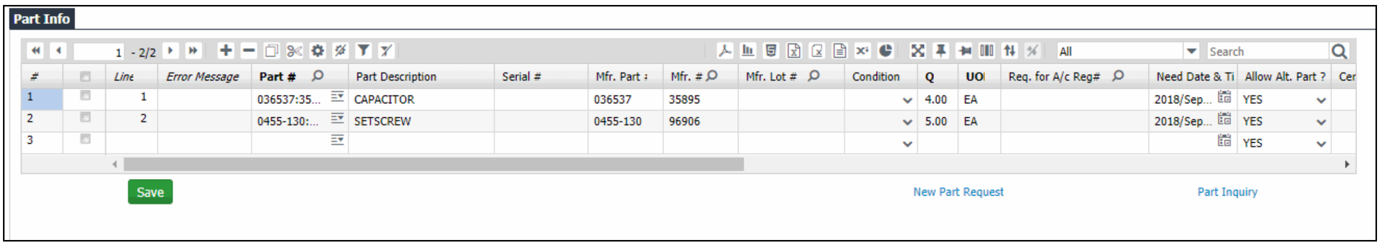


Figure 2.7 Request for Sales - Part Info tab

In the **Part Info** tab page

3. Enter the part that is requested by the customer in the **Part #** .
4. Enter the quantity of the part that is requested by the customer in the **Qty** .
5. Provide the unit of measurement of the part in the **UOM**
6. Enter the date and time in which the part is required by the customer in the **Need Date & Time**
7. Select the basis of home based stock consumption in the Home Based Stock column which could be either of the following:
   - Report Consumption to specify the Serial # which is consumed.
   - Place Demand to know the Serial # consumed and expects the system to allocate the Part #.

Note: Home Based Stock left as 'Blank' indicates that the Customer Request for 'Exchange' is not a Home Based Consumption request.

2.1.7 CREATING REQUEST FOR REPAIR

1. Select **Manage Customer Request** action under the **Customer Request** business component. The **Manage Customer Request** page appears. *See Figure 2.8.*
2. Use the Request For drop-down list box to specify 'Aircraft'. The system displays the **Core Info** tab.

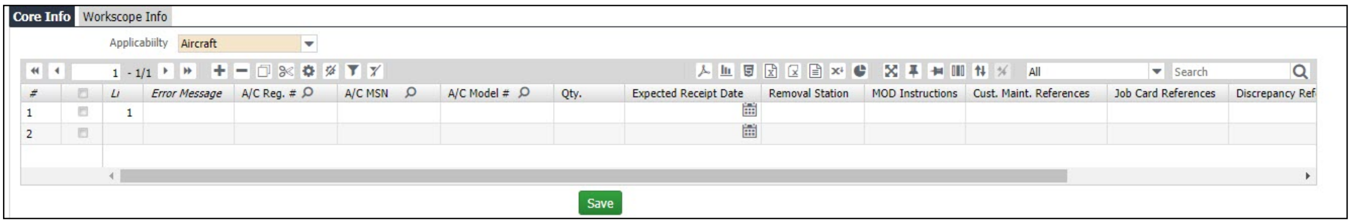


Figure 2.8 Core Information

1. In the Applicability combo, specify whether repair is for Part or Aircraft and provide other details in the multiline.
2. Use the Request For drop-down list box to specify 'Aircraft'. The system displays the Core Info tab.
3. Click the Save pushbutton to save the details of core parts to be repaired.

2.1.8 RECORDING WORK SCOPE INFORMATION

1. Select **Manage Customer Request** action under the **Customer Request** business component. The **Manage Customer Request** page appears. *See Figure 2.8.*
2. Use the Line # combo to select the core line reference and specify other details in the multiline.

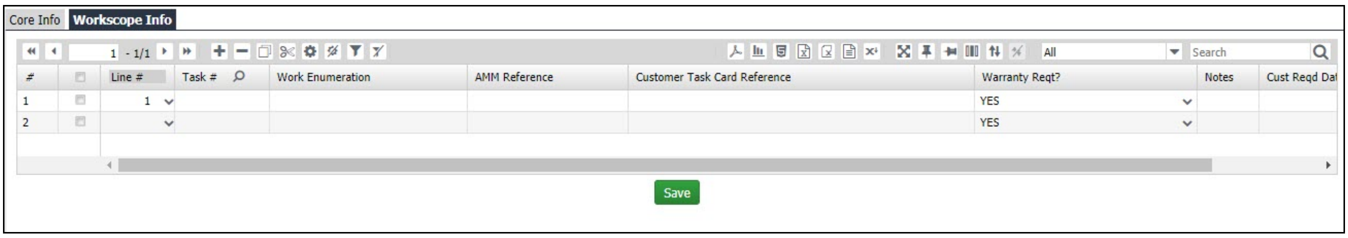


Figure 2.9 Work scope Information

Note: Ensure that data is specified in the Core Info tab multiline.

Note: The 'Work Scope Info." can be defined and saved at each Aircraft Reg # or Aircraft Model # level as defined in the 'Core Info' tab.

3. Click the Save pushbutton.

PART SALE ORDER

A part sale order contains comprehensive information on the various terms and conditions to be followed to have the sale established, the way the parts needs to be sourced for fulfilling the sale, the billable nature of the order, etc. This user interface provides the capability to manage both Direct Part Sale Order and Quote based Part Sales Order.

The **Manage Part Sale Order** serves the following purposes:

- Converting customer approved quote into sales order.
- Creating and processing direct sales orders.
- Identification of the sourcing strategy for Parts in sales order.
- Short-close the sales order

.

3.1 MANAGING PART SALE ORDER

A part sales order can be recorded in this screen against a Pre-Quotation document or without reference to any Pre-Quotation using the Direct Sales order butt

1. Select **Manage Part Sale Order** under **Part Sale Order** business component. The **Manage Part Sale Order** page appears. *See Figure 3.1.*

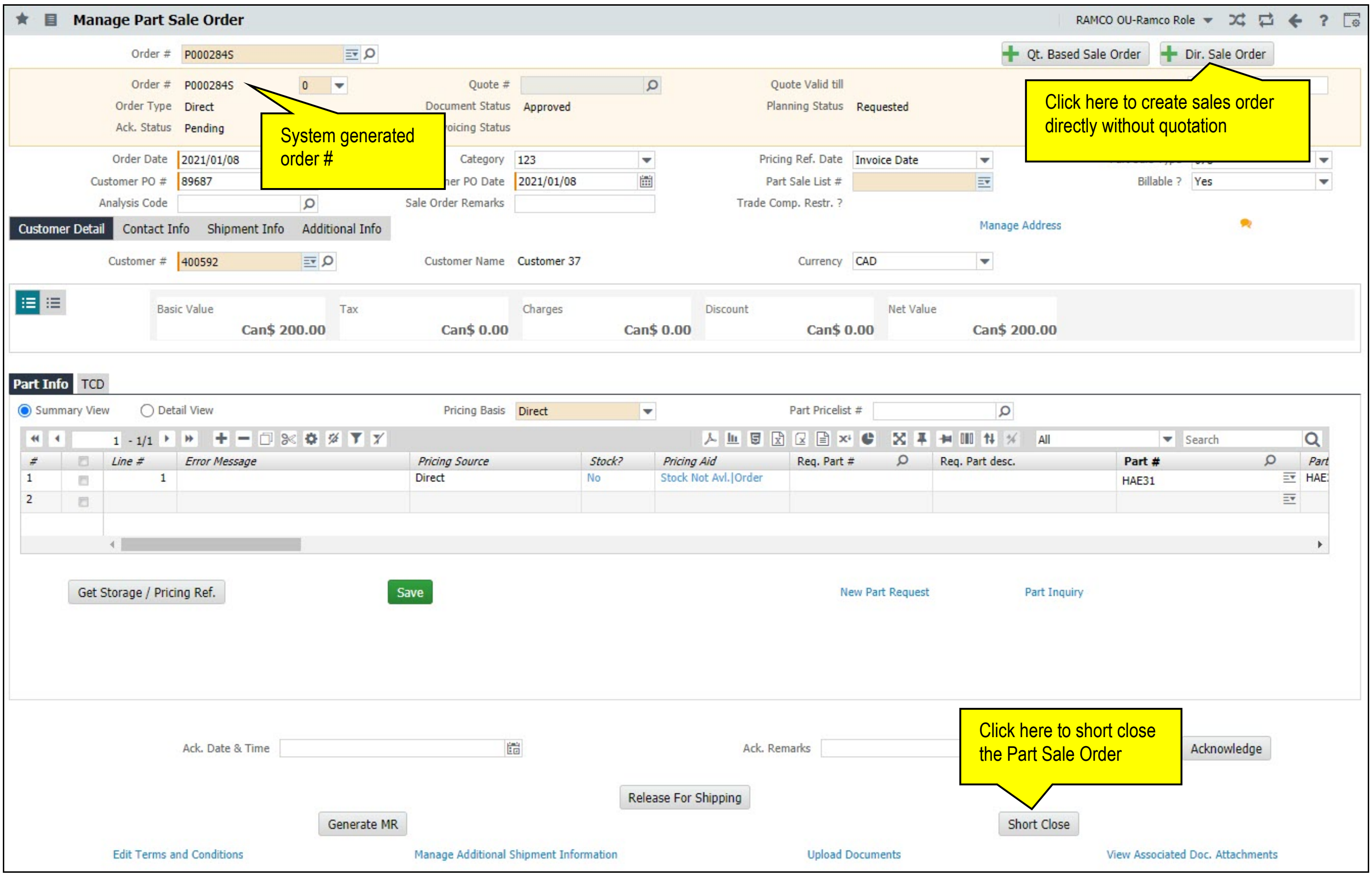


Figure 3.1 Managing part sale order

2. Enter the sale order number of the part in the **Order #** .
3. Select the **+ Qt. Based Sales Order** to render the screen to create sales order based on quotation.
4. Select the **+ Dir. Sales Order** to render the screen to create sales order directly without the quotation.
5. Enter the **Revision** of the order and the **Quote #** referring to which sale order is created.
6. Provide the **Quote #** referring to which the Sale Order is created/
7. Specify the request for quote in the **RFQ #** field.
8. Also enter the details such as **Order Date**, **Category** of the Part Sale Order, **Part Sale List #,** and specify the **Billability?** of the Part Sale Oder and enter the other details and enter the date in which the part sale order was created in **Order Date**.

Note: The system allows provision for sale of capital parts through Part Sale Order though parameter settings as follows:

*To define the 'Capital Parts' through Part Sale Order, the parameters 'Allow Sale of Capital Parts through Part Sale Order'' in the **Set Sales Process Parameter** activity under **Customer** business component must be set as "Yes"*

*Note: On confirmation of a Part Sale Order, while sourcing of parts ,if pool evaluation is required, then the parameter "Part sales serviced through pool ?" in the **Manage Additional Options** activity under the **Customer** business component must be set as "Yes".*

3.1.1 Recording customer detail

1. Select the **Customer Detail** button bar to record customer details. *See Figure 3.2.*

Figure 3.2 Recording customer details

2. Enter the **Customer #** and press <Enter> to automatically retrieve the customer details.

Contact Info

3. Select the **Contact Info** button bar to record customer details. *See Figure 3.3.*

Figure 3.3 Recording Contact Info

Shipment Info

4. Select the **Shipment Info** button bar to record customer details. *See Figure 3.4.*

Figure 3.4 Recording Shipment Info

Additional Info

5. Select the **Additional Info** button bar to record customer details. *See Figure 3.5.*

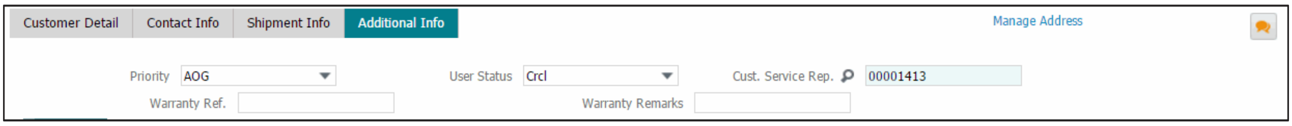


Figure 3.5 Recording Additional Info

1. Use the drop-down list box to specify the Priority for processing the Part Sale Order..
2. Enter the User Status of the Part Sale Order and specify the person to liaise with in the Customer Service Rep. field.
3. Provide the SLA Category to which the Part Sale Order belongs and enter Request Purpose and the Request Source, .
4. Select **Part Info** tab to record part information to generate a sale order.
5. Select **TCD** tab to record part information to generate a sale order.
6. Click the **Get Storage / Pricing Reference** pushbutton to retrieve stock and pricing details for the selected part.
7. Click the **Save** pushbutton to save details against the sale order

   Note: Ensure that the specified warehouse is mapped to the Part Sale Order transaction

8. Click the **Short Close** pushbutton to short close the part sale order
9. Enter the current system date and time in which the Part Sale Order is acknowledged in the Ack. Date & Time field.
10. Provide any comment pertaining to the acknowledgment of the Part Sale Order in the Ack. Remarks field.
11. Click the Acknowledge pushbutton to acknowledge the Part Sale Order.
12. Click the **Release For Shipping** pushbutton to release the Parts for shipping.

    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*

13. Click the Generate MR pushbutton

To provide further details,

- Select the New Part Request link to request a new part or to modify part attributes.
- Select the Part Inquiry link to view details of stock and price reference.
- Select the **Edit Terms and Condition** link at the bottom of the page to modify details of the payment terms and conditions for the parts to be serviced.
- Select the Upload Documents link at the bottom of the page to upload documents or attach files for reference.
- Select the **View Associated Doc. Attachments** link at the botton of the page to view details of the documents att for reference

3.1.2 RECORDING PART INFORMATION

1. Select the **Part Info** tab in the **Manage Part Sale** activity of the **Part Sale Order** business component. *See Figure 3.6.*

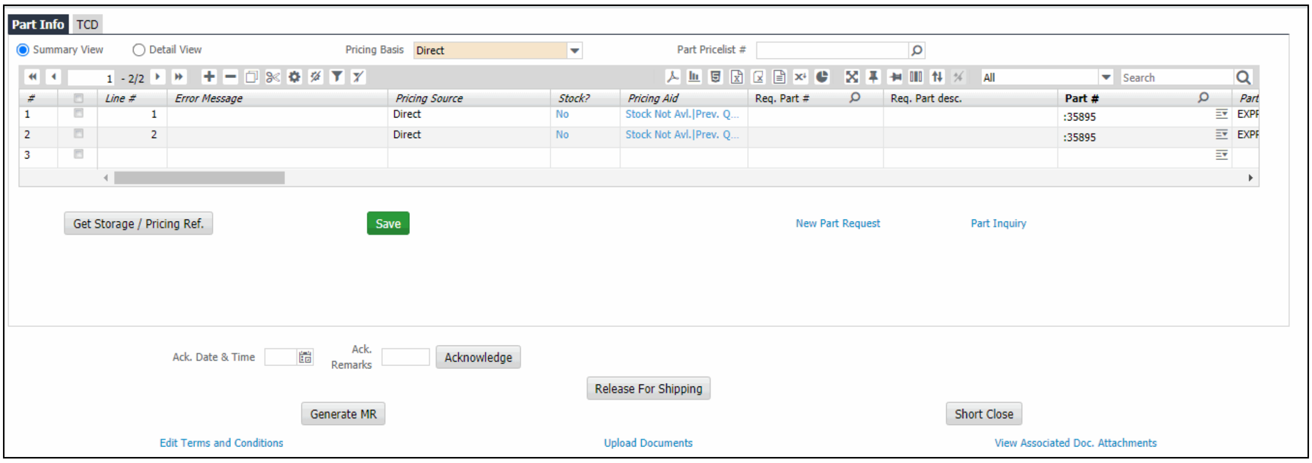


Figure 3.6 Recording Additional Info

In the **Part Info** multiline:

2. Enter the **Part #**.
3. Enter the total quantity of the part ordered. In **Ordered Qty** column.
4. Enter the unit of measurement in which the part is ordered in a location in the **UOM** column.
5. Provide the expected delivery date of the part in the **Exp. Delivery Date** field.
6. Enter the Source of the stock to be serviced and sent to the customer.
7. Specify the Stock Status of the part.
8. Enter the **Unit Price** of the part.

3.1.3 RECORDING TCD INFORMATION

1. Select the **TCD** tab in the **Manage Part Sale** activity of the **Part Sale Order** business component. *See Figure 3.7.*

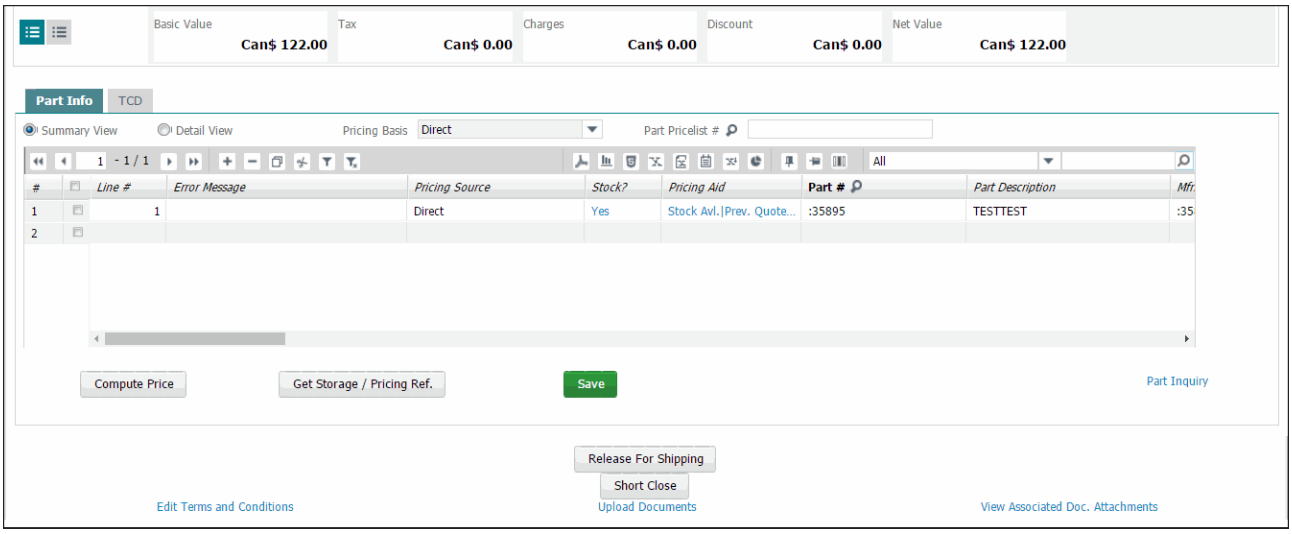


Figure 3.7 Recording Additional Info

In the **TCD** multiline:

2. Enter the **TCD #**.
3. Enter the **Variant #** of the TCD.
4. Enter the **Rate** of the TCD.
5. Click the **Compute Price** pushbutton to compute price details.

Note: Part Sale Order generation in any status will be restricted even during the auto set up of PSO on Request Confirmation (automation of PSO from request) / Request Processing (from CO hub – error Request) if any of the entities in the transaction are restricted as per the master definitions and the parameter against the restriction code is set accordingly.

PRE-ORDER QUOTATION

This activity enables you to generate a Pre-Order Quotation document that can be processed into a Sale Order.

Once a pre-quote is created and configured the supervisor is required to release the quote for customer approval. It can also be returned on the grounds of say corrections to be made in the quote. Subsequently the quotation is released to the customer for customer acceptance.

A Pre-Order Quotation can be recorded in this screen against an RFQ document or it can be done without reference to any RFQ using the 'RFQ Based Quote' or 'Direct Quote' buttons respectively.

4.1 MANAGING PRE-ORDER QUOTATION

This activity enables you to provide quotation information for the Customer, along with Contact Information, Shipment Information, Additional, Information while creating the Quotation. The user can quote for parts by directly providing the unit price or by retrieving the price from the Part Pricelist.

There is provision for the user to enter additional quotation information for the customer. If required TCD information can also be provided.

4.1.1 RECORDING PRIMARY QUOTATION

1. Select **Manage Pre-Order Quotati** activity in the **Pre-Order Quotation** business component. The **Manage Pre-Order Quotation** page appears. *See Figure 4.1.*

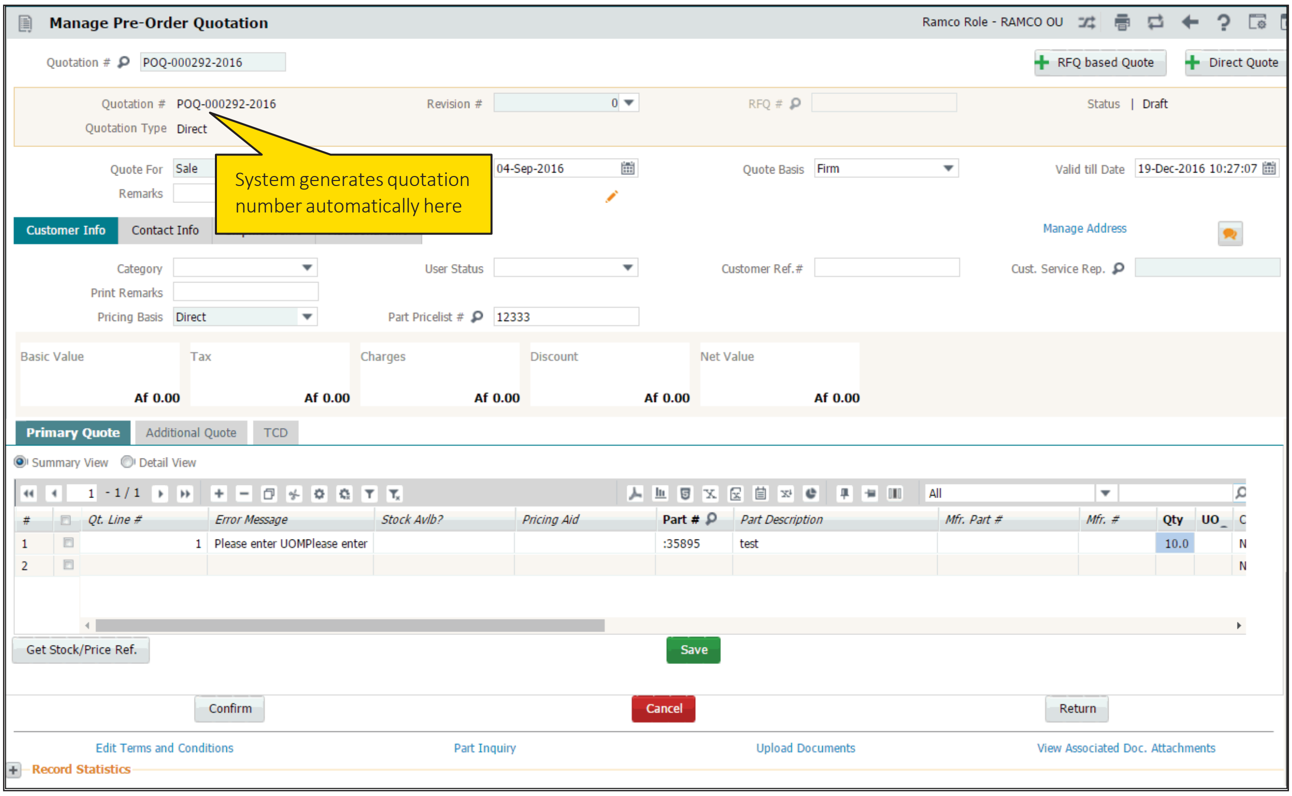


Figure 4.1 Managing Pre-Order Quotation

2. Select the **+ RFQ Based Quote** to create the quotation based on the customer request for quotation.
3. Select the **+ Direct Quote** to create a direct quotation i.e., a quote without a Request reference.
4. Enter the **Revision #** and **Quotation#** to view a quote that has already been generated
5. Enter the basis for the quote in Quote For drop-down list box and provide other details.

Recording customer detail

6. Select the **Customer Detail** button bar to record customer details. *See Figure 4.2.*

Figure 4.2 Recording customer details

7. Enter the **Customer #** and press <**Enter**> to automatically retrieve the customer details.

Contact info

8. Select the **Contact Info** button bar to record customer details. *See Figure 4.3.*

Figure 4.3 Recording Contact Info

9. Use the **Contact Address ID** drop-down list box to specify the address ID for which the contact person information must be displayed. If there is a default address ID available in the Customer Master, the same will be defaulted.

Shipment info

10. Select the **Shipment Info** button bar to record customer details. *See Figure 4.4.*

Figure 4.4 Recording Shipment Info

11. Use the **Address ID** drop-down list box to specify the unique number that identifies the address of the customer to which the Parts needs to be shipped. If there is a default address ID available in the Customer Master, the same will be defaulted.

Additional info

12. Select the **Additional Info** button bar to record customer details. *See Figure 4.5.*

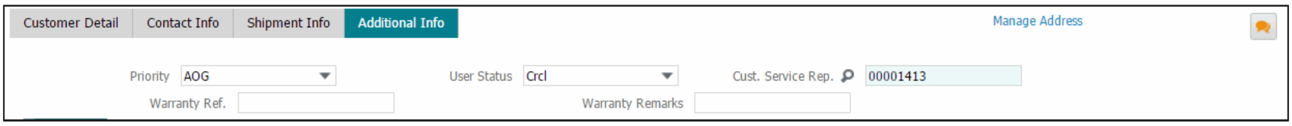


Figure 4.5 Recording Additional Info

13. Use the **Category** drop-down list box to specify the category to which the Pre-Order Quotation belongs and provide the other details.

14. Select the **Primary Quote** tab to record primary quotation details.

15. Select the **Additional Quote** tab to record additional details.

16. Select the **TCD** tab to record tax, charges and discount details.

To proceed further,

- Select the **Part Inquiry** link at the bottom of the page to check the availability of the Part entered or to view the details of previous Quote, if any.
- Select the **Edit Terms and Condition** link at the bottom of the page to modify details of the payment terms, Shipment Info., and so on.
- Select the **Upload Documents** link at the bottom of the page to upload documents or attach files for reference.
- Select the **View Associated Doc. Att** link at the bottom of the page to view details of the documents attached for reference.

4.1.2 RECORDING PRIMARY QUOTATION

1. Select the **Primary Quote** tab page in the **Manage Pre-Order Quotation** activity of the business component. *See Figure 4.6.*

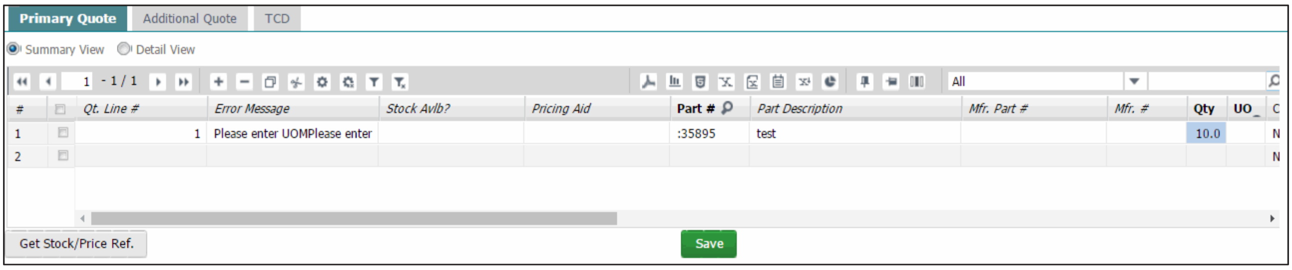


Figure 4.6 Primary Info tab

2. Enter the **Part #** and the **Qty** of the part for which the quotation is applicable.
3. Enter the unit of measurement in which the quantity of the part in the Quotation is measured in the **UOM** column.
4. Enter the expected delivery date of the part in the **Exp. Delivery Date** column.
5. Enter the **Unit Price** that is to be quoted for one quantity of the part.

   Note: If the Pricing Basis is 'Direct', the Unit Price column will be visible.
6. Click the **Get Stock/Price Ref.** pushbutton to retrieve stock availability / pricing details.
7. Enter **Pricelist #** if "Pricelist' is specified in the 'Pricing Basis' field.
8. Click on **Get Stock/Price Ref.** pushbutton to retrieve the pricing details
9. Click on **Compute Price** button to retrieve and compute the price for the Parts entered.
10. Click **Save**.

4.1.3 RECORDING ADDITIONAL QUOTE DETAILS

1. Select the **Additional Quote** tab in the **Manage Pre-Order Quotation** activity of the **Pre-Order Quotation** business component. *See Figure 4.7.*

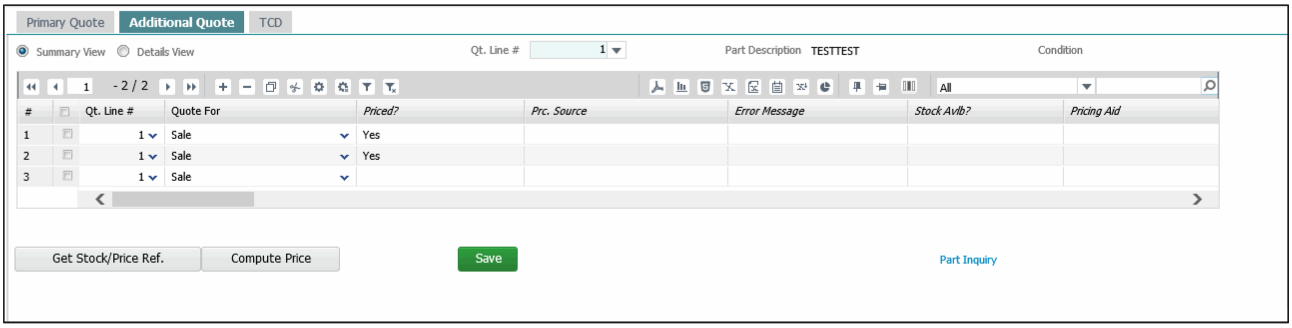


Figure 4.7 Additional quote tab

2. To provide **Additional Quote** for the same Part # for which the **Primary Quote** is given, select the line # of the Part as defined in the **Primary Quote** tab from the **Qt. Line #** drop down list box from the header. If additional Quote is for an alternate part against a part from the primary quote, select the **Qt. line #** in the multiline and enter the **Part #** and quantity of the part in **Qty.** and the **Qty** of the part for which the quotation is applicable.
3. Enter the unit of measurement in which the quantity of the part in the quotation is measured in the **UOM** column.
4. Enter the expected delivery date of the part in the **Exp. Delivery Date** column
5. Enter the **Unit Price** that is to be quoted for one quantity of the part.

   Note: If the Pricing Basis is 'Direct', the Unit Price column will be visible.
6. Click the **Get Stock/Price Ref.** pushbutton to retrieve stock availability / pricing details.
7. Enter **Pricelist #** if the Pricing Basis is 'Pricelist'.

8. Click the **Get Stock/Price Ref.** pushbutton to retrieve the pricing details.
9. Click the **Compute Price** pushbutton to fetch and compute the price for the Parts entered.
10. Click on **Save** button.

4.1.4 RECORDING TCD DETAILS

1. Select the **TCD** tab in the **Manage Pre-Order Quotation** activity of the **Pre-Order Quotation** business component. *See Figure 4.8.*

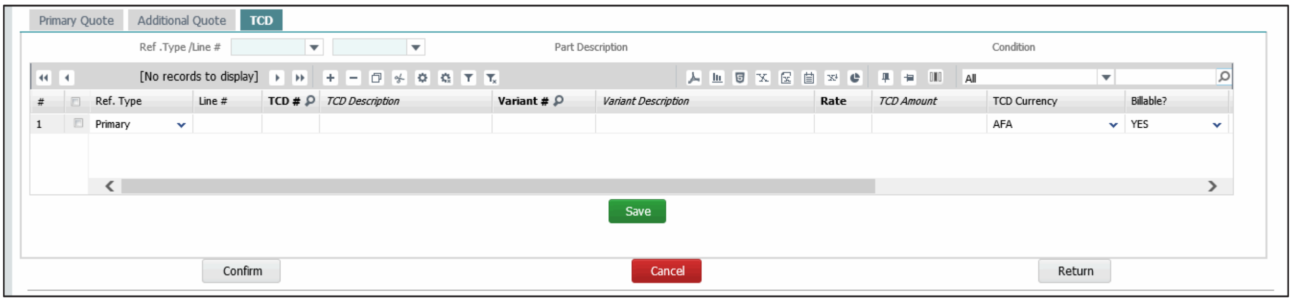


Figure 4.8 TCD tab

2. Select the **Ref. Type/Line #** in the header or in the multiline against which TCD must be applied.
3. Select **TCD #** and the **Variant #** of the TCD
4. Provide the **Rate** of the TCD.
5. Click on **Save** pushbutton.
6. Click **Confirm** pushbutton to confirm the Pre-Order Quotation.
7. Click **Cancel** pushbutton to cancel a Quotation.
8. Click R**eturn** to send the pre-order quotation for re-computation of prices.

4.1.5 RELEASING THE QUOTATION FOR CUSTOMER APPROVAL

1. Select the **Manage Pre-Order Quotation** activity in the **Pre-Order Quotation** business component. The **Manage Pre-Order Quotation** page appears.
2. Select the **Quotation #** that is 'Fresh' status which you wish to release for customer approval.
3. Press <**Enter**> to retrieve the relevant quote details.
4. Select the item from the multiline for which you wish to release quotation for customer approval.

   Note: Only quotes that are in Fresh status can be confirmed

5. Click the **Confirm** pushbutton to confirm the pre order quotation.

   Note: Only quotes that are in 'Confirmed' status is allowed to be released

6. Click the **Release to Approval** pushbutton to send the quote for customer approval. *See Figure 4.9.*

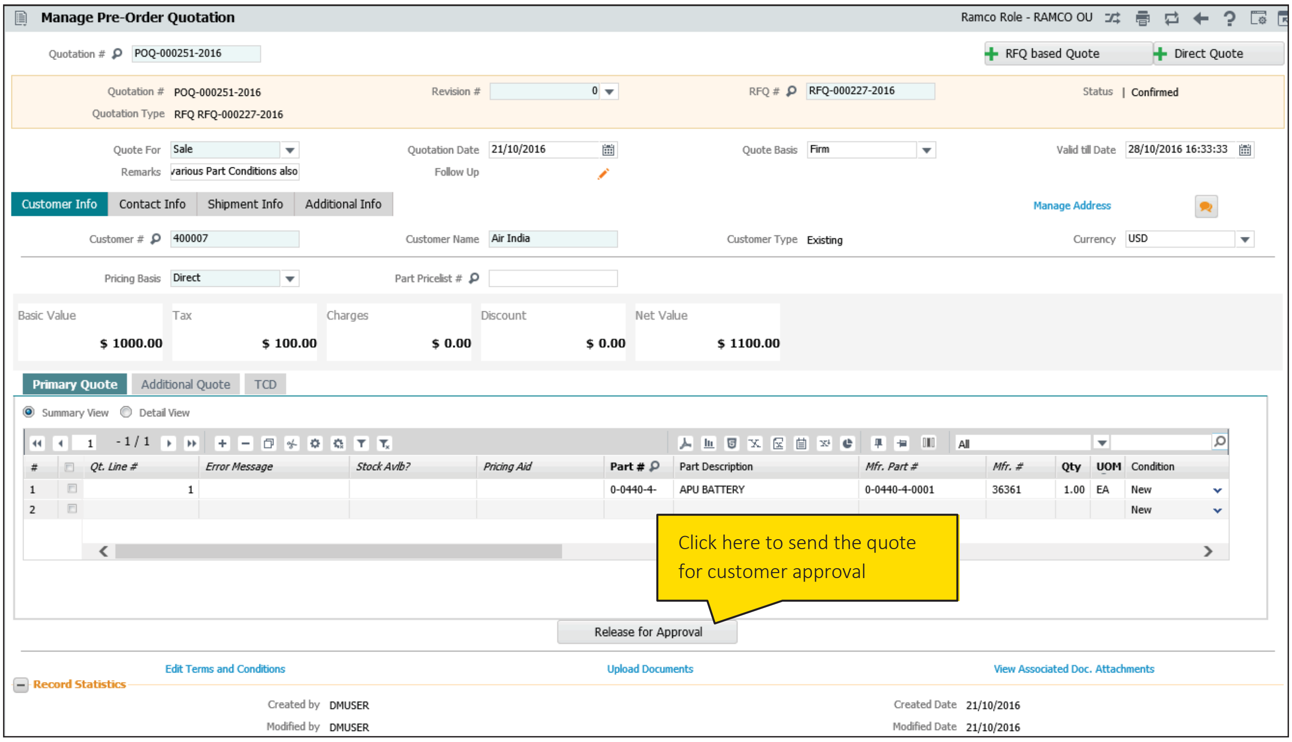


Figure 4.9 Release For Approval

4.1.6 ACCEPTANCE / REJECTION OF QUOTE

Once a quote is confirmed it is released for approval, the system displays the "Summary and Acceptance" tab. This tab enables you to view the quotation details. All the primary and Additional Quotes provided for the part along with the TCD will be displayed under this tab.

1. Click the **Confirm** pushbutton to confirm the pre order quotation in the **Manage Pre-Order Quotation** activity of the **Pre-order Quotation** business component.
2. Click the **Release to Approval** pushbutton to send the quote for customer approval. The 'Summary and Acceptance' tab appears *4.10.*
3. Select the Summary and Acceptance tab to view the quotation details.

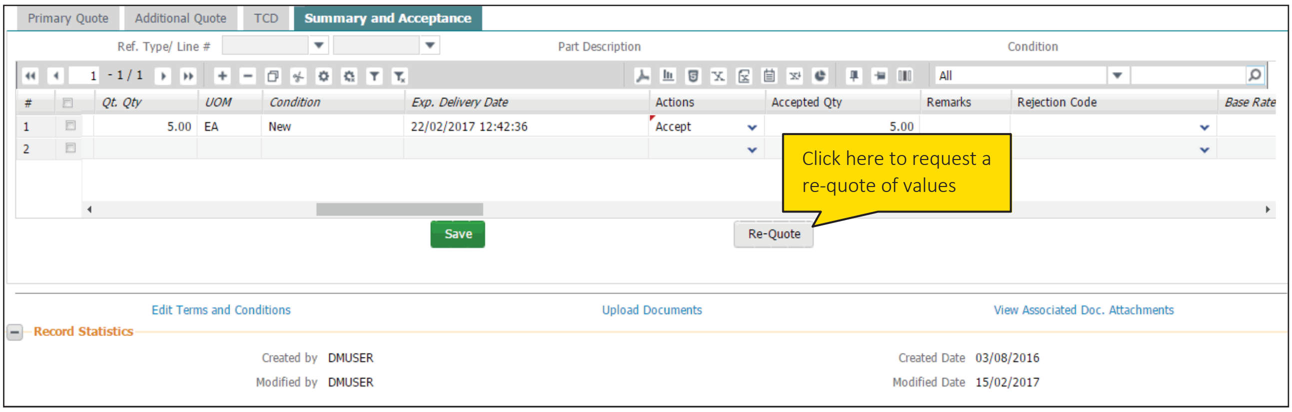


Figure 4.10 Acceptance/ Rejection of quote

To accept a quote,

4. Select 'Accept' in the **Action** column in the multiline and specify the quantity for which the quote is accepted for in the **Accepted Qty**. column.

To accept a quote,

1. Select ‘Reject’ in the **Action** column in the multiline and specify the **Remarks** and enter the **Rejection Code** against the line that is being rejected.

   ✍ *Note: If ‘Reject’ is selected as the Action column in the multiline, ensure that the Remarks column is specific*

   ✍ *Note: You can specify the Rejection Code in the multiline. The system lists all the quick codes that are defined for the ‘Category Type’ Rejection Code in the* ***Maintain Category Codes*** *activity of the* ***Category*** *business component.*

2. Click **Save** pushbutton.

To re-quote,

3. Click the **Re-Quote** pushbutton to request the re-quotation of the values.

Index

A

Acceptance / rejection
- Quote, 24
- Acknowledge, 16
- Advance Exchange, 11
- Advance: Exchange, 11

C

Check
- Part Availability, 12

Compute Price, 20, 21
Compute
- Price, 16

Contact
- Info, 18

Core Info, 12
Create
- Numbering Type, 9

Customer Request, 7
Customer
- Portal, 7
- Request, 5

Customer
- Request, 8

D

Default
- Numbering Type, 9

Direct
- Quote, 20

Document
- Numbering Class, 9

G

Get Stock, 22

H

Home Based: Stock, 13

M

Manage
- Address, 12
- Customer Request, 11
- Customer Requests, 5
- Part Sale Order, 14
- Pre-Order Quotation, 24

Managing
- Pre-order quotation, 20

N

New Part: Request, 17

O

Ordered Qty, 17

P

Part Details, 9
Part Inquiry, 19
Parts
- Off on Sale, 5

Pre-Order Quotation, 6
Pre-Order
- Quotation, 6

Primary Quote, 21
Prospect ID, 12

R

Recording
- Additional Info, 16
- Contact Info, 15
- Customer detail, 18
- Shipment Info, 15

Recording
- Additional quote details, 22
- Part information, 17
- Primary quotation, 20, 21
- TCD details, 23

Releasing
- Quotation for customer approval, 23

Request Date & Time, 11
Request for Quotation, 5
Request For, 11
Request: Purpose, 12; Source, 12
RFQ
- Based Quote, 18

S

Shipment info, 16
Shipment
- Info, 21
- SLA: Category, 16
- Stock: Status, 17

U

Unit Price, 17
UOM, 13

W

Workscope Infomation, 12

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