

ISP Order Management System

New Order
Master Settings
Upgrade Entry
Downgrade Entry
Price Revision
Shifting
Migration Entry
Termination Entry
Daily Activity reports
Other Requirement

*“Smartest way to
Manage Orders”*



Introduction

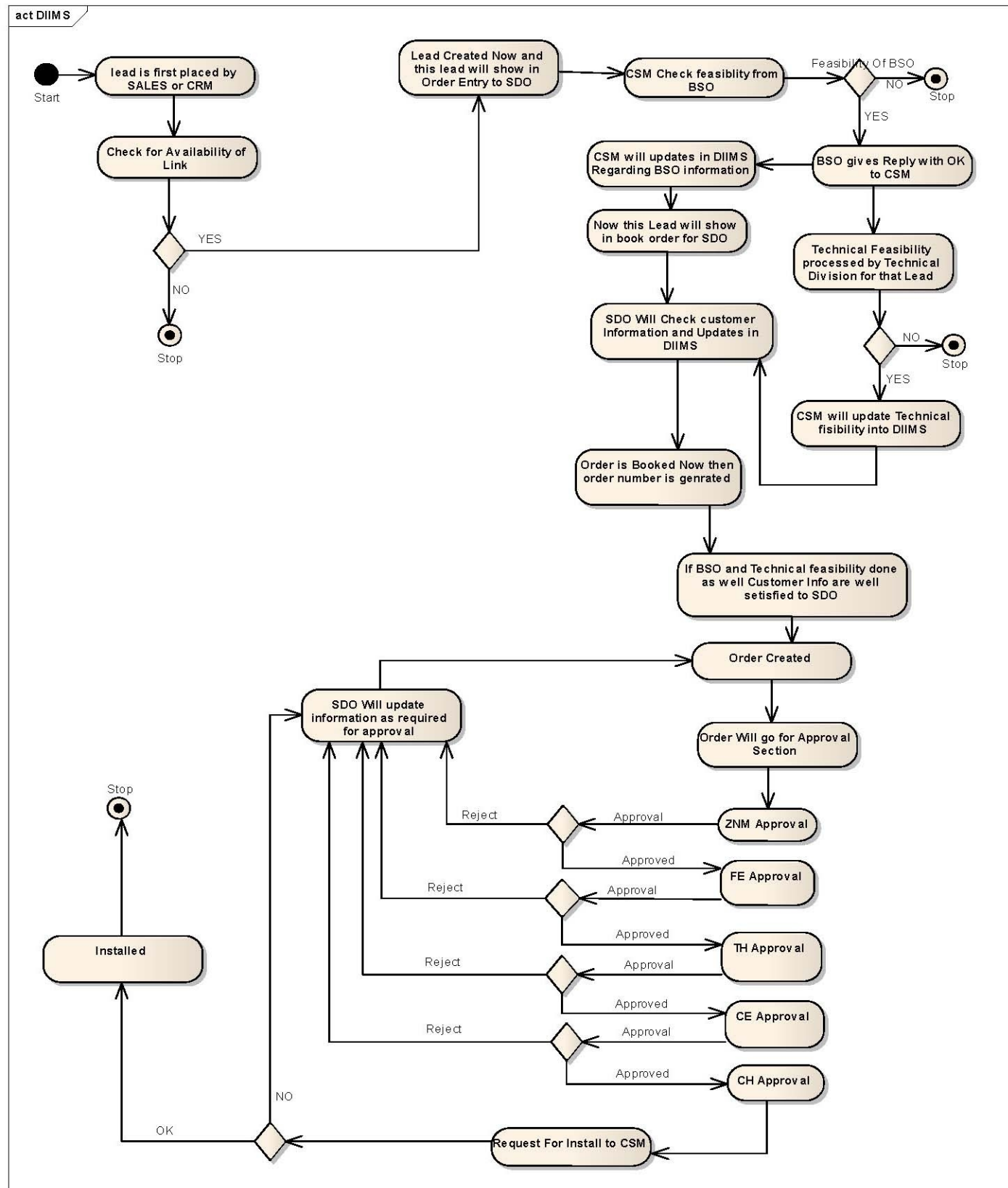
Order Mangement System For ISP's

NEW ORDER

- ▶ Create new lead of New or existing customer
- ▶ Enter Billing and installation details
- ▶ Enter Multiple product details View lead branch wise
- ▶ Auto email of Lead send to BSO for feasibility check
- ▶ Check up of technical details installation branch wise
- ▶ Order entry of lead with 4 steps
 - ▶ CAF details
 - ▶ Product, pricing, billing cycle, hardware details
 - ▶ Payment details
 - ▶ Customer Document attachment details
- ▶ Enter in Approval matrix
- ▶ All Created Orders will now move into approval buckets of Branch Finance Executive and he can view all the orders pending in his bucket
- ▶ Once an Order is approved by Branch Finance Executive, the order will next move to RSM, ZSM, Heads Sales, CFO, Business Head, Technical Head & Commercial Head buckets. Same step is to be followed at every approval stages.
- ▶ Approve or reject order in approval matrix with reason
- ▶ Request to install request for CSM
- ▶ Installation details entered when order installed by CSM
- ▶ REPORTS
 - ▶ Branch wise reports for installed orders
 - ▶ Pending order installation report
 - ▶ Approved order report
 - ▶ Created order report
 - ▶ Cancelled order report
 - ▶ Feasibility report
 - ▶ Lead TAT report
 - ▶ Full Master report of Lead to installation
- ▶ Advance search option on every step of work
- ▶ Export all reports to Excel format
- ▶ Auto generation of setup invoice for new order in billing program
- ▶ SMS integration to group and department in accordance to each step of working
- ▶ Auto email according to group and department in accordance to step of working

Flow For New Order

New Order



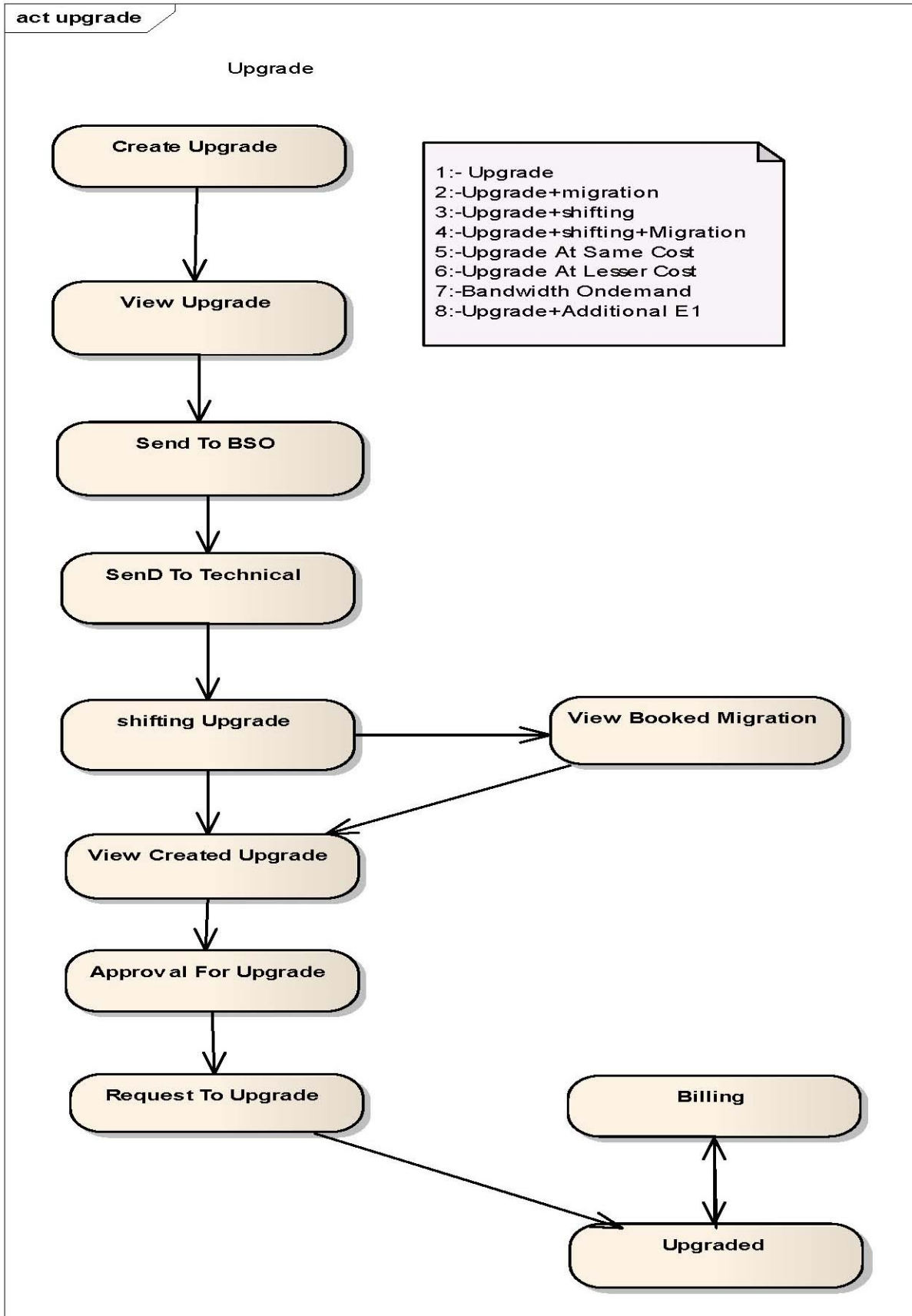
MASTER SETTINGS

- ▶ Assign menu rights to user and group
- ▶ Assign branch user rights
- ▶ Create unlimited groups
- ▶ unlimited product and category
- ▶ Ability to add attachment for your product.
- ▶ Enable/disable Setup fee per product
- ▶ Enable/disable discount per product

UPGRADE ENTRY

- ▶ Create new upgrade for existing customer
- ▶ Upgrade type
 - ▶ Normal upgrade
 - ▶ Upgrade + migration
 - ▶ Upgrade + shifting
 - ▶ Upgrade + shifting + migration
 - ▶ Upgrade at same cost
 - ▶ Upgrade at lesser cost
- ▶ Enter upgrade product or service details
- ▶ Mention upgrade in-effective date
- ▶ View Upgrade entry branch wise
- ▶ Auto email of Upgrade send to BSO for feasibility check
- ▶ Check up of technical details installation branch wise
- ▶ Same Order entry of lead with 4 steps
 - ▶ CAF details
 - ▶ Product, pricing, billing cycle, hardware details
 - ▶ Payment details
 - ▶ Customer Document attachment details
- ▶ Enter in Upgrade Approval matrix
- ▶ Upgraded Order will auto generate Debit or Credit note according to pricing difference in billing
- ▶ REPORTS
 - ▶ Branch wise reports
 - ▶ Pending Upgrade report
 - ▶ Upgrade Approved report

Flow For Upgrade Entry



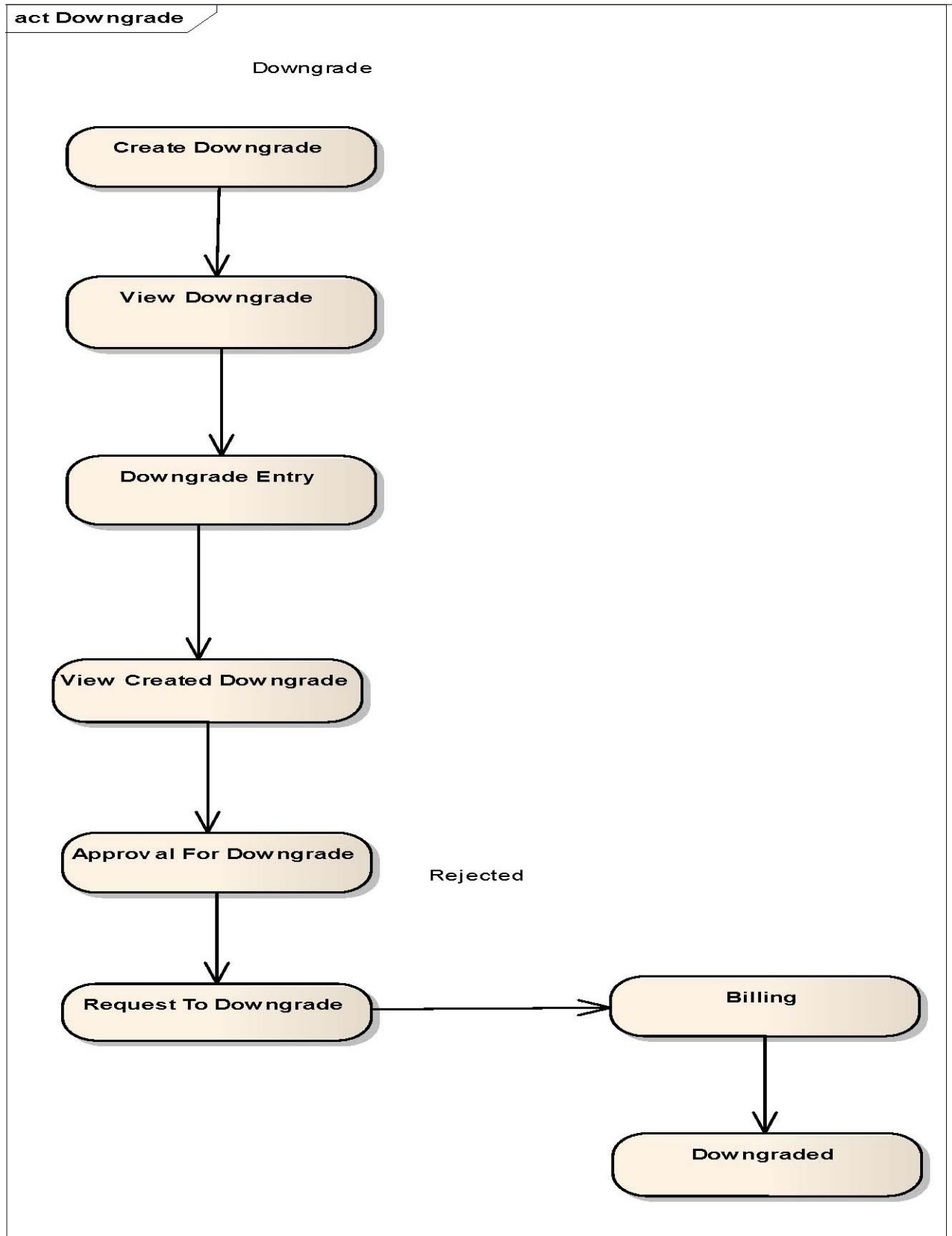
FEATURES

PRICE REVISION

- ▶ Create Price Revision for existing customer
- ▶ Enter New Price
- ▶ Mention New Price in-effective date
- ▶ Enter in Price Revision Approval matrix
- ▶ Price Revision will auto generate Credit note in billing REPORTS
 - ▶ Branch wise reports
 - ▶ Pending Price Revision report
 - ▶ Price Revision Approved report

DOWNGRADE ENTRY

- ▶ Create new downgrade for existing customer
- ▶ Enter downgrade product or service details
- ▶ Mention downgrade in-effective date
- ▶ View downgrade entry branch wise
- ▶ Downgrade entry in 1 steps
 - ▶ CAF details
 - ▶ Product, pricing
 - ▶ Customer Document attachment details
 - ▶ Enter in Downgrade Approval matrix
- ▶ Downgrade will auto generate Debit or Credit note according to pricing difference in billing
- ▶ REPORTS
 - ▶ Branch wise reports
 - ▶ Pending Upgrade report
 - ▶ Upgrade Approved report

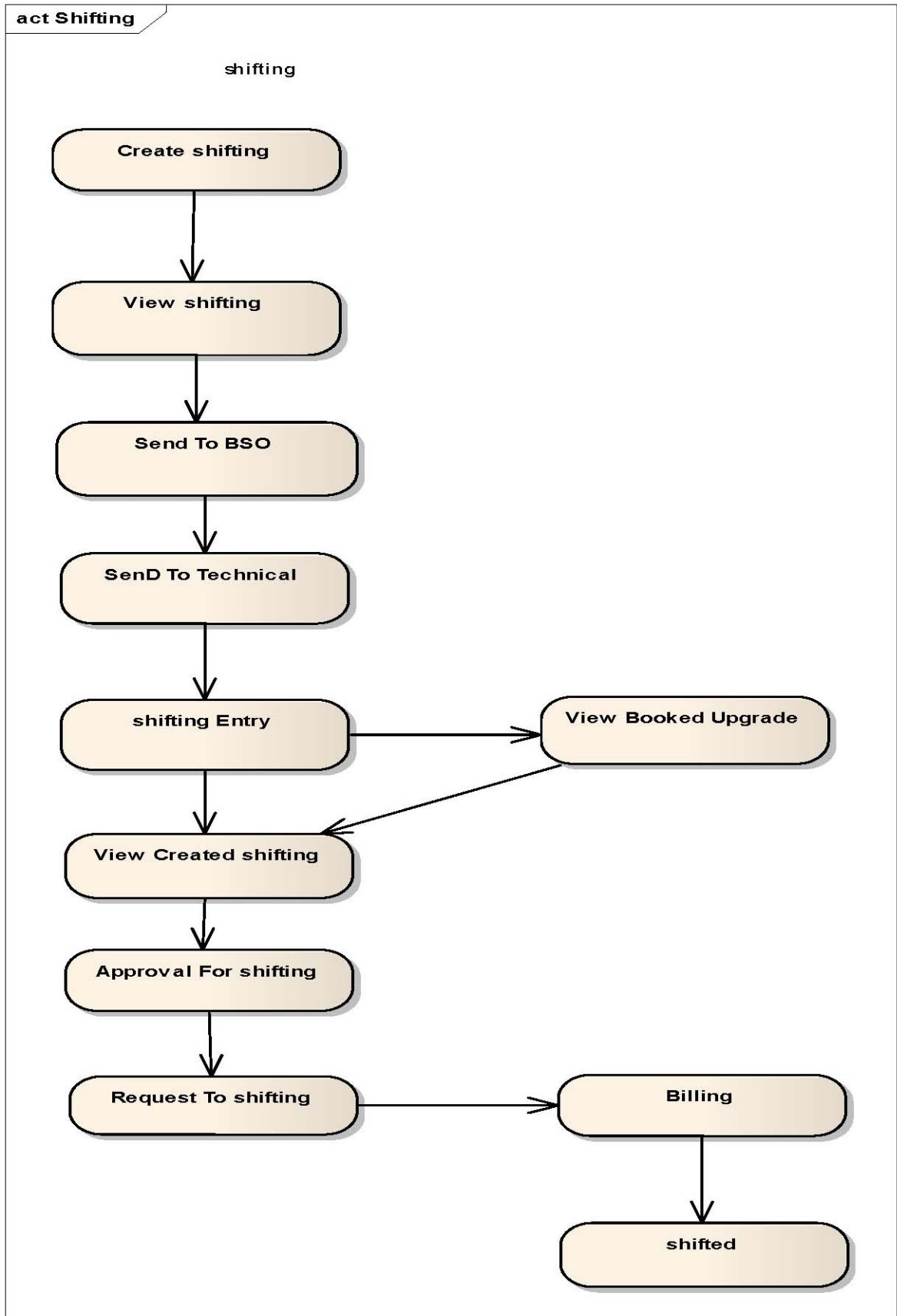


MIGRATION ENTRY

- ▶ Create new Migration for existing customer
- ▶ Mention Preferred Delivery Mode
- ▶ Mention Migration in-effective date
- ▶ View Migration entry branch wise
- ▶ Auto email of Migration send to BSO for feasibility check
- ▶ Check up of technical details installation branch wise
- ▶ Same Order entry of lead with 4 steps for MIGRATION
 - ▶ CAF details
 - ▶ Migration Charge if required
 - ▶ Payment details
 - ▶ Customer Document attachment details
- ▶ Enter in Migration Approval matrix
- ▶ Migration Order will auto generate Debit or Credit note according to pricing difference in billing
- ▶ REPORTS
 - ▶ Branch wise reports
 - ▶ Pending Migration report
 - ▶ Migration Approved report

SHIFTING

- ▶ Create new Shifting for existing customer
- ▶ Mention new Installation Address
- ▶ Mention Shifting in-effective date
- ▶ View Shifting entry branch wise
- ▶ Auto email of Shifting request send to BSO for feasibility check
- ▶ Check up of technical details installation branch wise
- ▶ Same Order entry of lead with 4 steps for SHIFTING
 - ▶ CAF details
 - ▶ Product, pricing, hardware details
 - ▶ Payment details
 - ▶ Customer Document attachment details
- ▶ Enter in Shifting Approval matrix
- ▶ Shifting Order will auto generate Debit or Credit note according to pricing difference in billing
- ▶ REPORTS



SHIFTING

- ▶ Branch wise reports
- ▶ Pending Shifting report
- ▶ Shifting Approved report

TERMINATION ENTRY

- ▶ Create new Termination for existing customer
- ▶ Mention Termination in-effective date
- ▶ View Termination request entry branch wise
- ▶ Enter in Termination Approval matrix
- ▶ Termination Entry will auto generate Debit or Credit note according to pricing difference in billing
- ▶ REPORTS
 - ▶ Branch wise reports
 - ▶ Pending Termination report
 - ▶ Termination Approved report

DAILY ACTIVITY REPORTS

- ▶ Create request for existing customer
- ▶ Mention customer problem, CRM comments, problem type, supports from head office
- ▶ Request can be auto closed.
- ▶ Problem types
 - ▶ New Order
 - ▶ Upgrade
 - ▶ Downgrade
 - ▶ Price revision
 - ▶ Shifting Migration
 - ▶ Termination
 - ▶ Payment Related
 - ▶ Service Issue
 - ▶ Curtsy
- ▶ View DAR request entry according user rights
- ▶ Head Office Comment given by higher authorities according Problem types

DAILY ACTIVITY REPORTS

- ▶ CSCH take final decision
- ▶ CSCH can take suggestion to other higher authority. Termination Entry will auto generate Debit or Credit note according to pricing difference in billing
- ▶ REPORTS
 - ▶ Branch wise reports
 - ▶ Pending request report
 - ▶ Closed or open request report

OTHER REQUIREMENT

- ▶ Create new OR request for existing customer
- ▶ Mention Customer requirement
- ▶ Upload approval mails
- ▶ View OR entry branch wise
- ▶ Auto email of Migration send to BSO for feasibility check
- ▶ Check up of technical details Other Requirement option wise
- ▶ Enter in OR Approval matrix according requirement option
- ▶ OR Order will auto generate email for all related to requirements.

TECHNICAL SPECIFICATION

Software Requirement

Smartguard software require

Hardware Requirement

Dual Xeon 2.0 Processor or above

4 GB RAM

160 GB SATA HDD x 2

10/100 Mbps LAN Port

CD ROM

Monitor

Keyboard

Mouse

GOT QUESTIONS

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