

ORDER PROCESSING

Guidelines

v.1.0.0 | 12th December 2024

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All partners have a unique login ID to access our ERP system for placing orders. Only registered stakeholders, including Channel Partners, Sub-Channel Partners, and Retailers, are authorized to place orders. If you do not have an ERP login, please contact your salesperson for assistance.

1. Pre-Sales Information

Order Types

We have two categories of orders :

- **Back-end Orders**
- **Front-end Orders**

1.1 Back-end Orders

The back-end category includes products that are readily available in stock. The Channel Partners can purchase these products in advance to begin work at the customer site. The following products are included in this category:

- **Smart Devices (SD)**
- **Remote Devices (RD)**
- **Curtain Flow**
- **Curtain Track**
- **HomeLink Pro**
- **HomeLink**
- **IR blaster and Emmitter**
- **Accessories**

1.1.1 Delivery Time Schedule

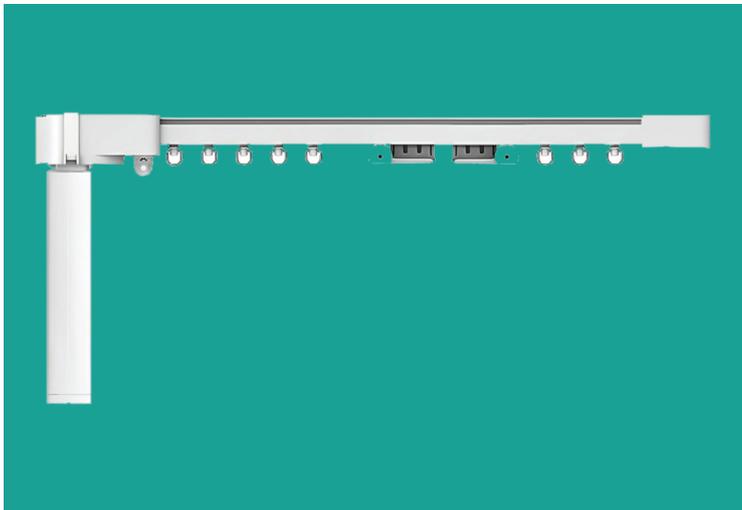
Legend: **S** - Same Day Dispatch

Sr. No.	Order placing Condition		Dispatch day
	Time	Quantity	
1	Before 12pm	Less-than 20	S
2	Before 12pm	More-than 20	S+1
3	After 12pm	Less-than 20	S+1
4	After 12pm	More-than 20	S+2

1.1.2 Special Cases: Curtain Track Orders

To place an order for a curtain track, please include the following details in the "Terms and Conditions" section of the order form :

- **Type of Curtain**
3-Plate / Arabian
- **Length of the Track**
Please specify the size requirement in inches.
- **Mounting Option**
Ceiling / Wall
- **Type of Runner**
Ring / Rope
- **Opening Style**
Center / Right / Left
- **Motor Side**
Right / Left

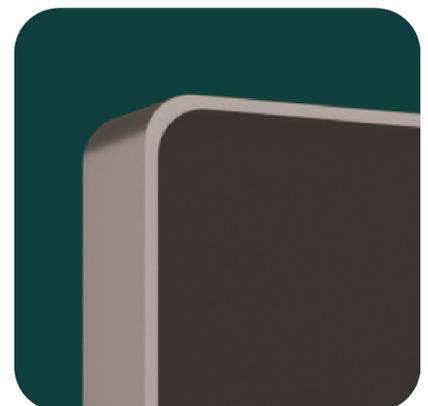
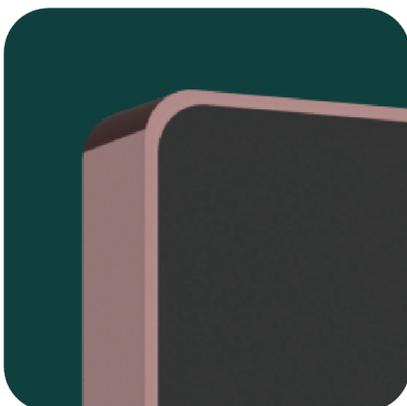


Delivery Time for Curtain Track

The orders are typically packed within 2 days. After packing, please allow 8-9 days for delivery to your shipping address. The Delivery takes this duration because transportation by road typically requires 8-9 days to reach your location.

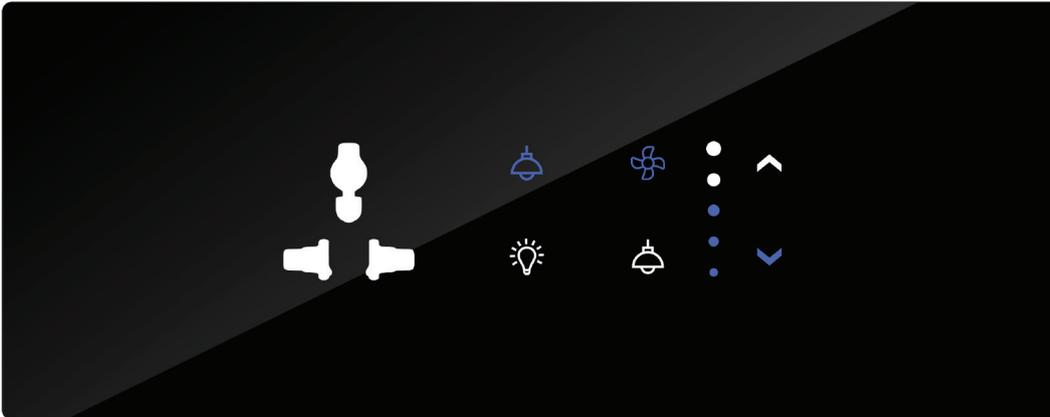
1.1.3 Delivery Time for Bezel

The 3M, 8M, and 12M bezel models will be delivered within 15 days. All other bezels will be dispatched according to the previously mentioned timeline.



1.2 Front-End Orders

For front-end orders, we provide three modes of order processing:



1	Normal Order	If you select this mode, your order will be processed as a normal order, and no additional charges will apply.
2	Urgent Order	An additional fee applies to urgent orders. These orders are prioritized to ensure faster dispatch and delivery
3	Immediate Order	Similar to urgent orders, an additional fee is charged for the immediate dispatch of your materials.

1.2.1 Delivery Time Schedule

Legend: **S** - Same Day Dispatch

Sr. No.	Color	Time	Normal Order	Urgent Order	Immediate Order
1	Black White	Before 12pm	S+3	S+2	S+1
	Golden Grey Silver Grey	After 12pm	S+4	S+3	S+2
2	Customize Color	Before 12pm	S+7	S+5	S+3
	Wood Marble	After 12pm	S+8	S+6	S+4

1.2.2 Additional Information

Order Date

The order date will also be automatically generated by the system.

Billing Details

If you need to change the billing details in your profile, please inform your account manager in advance.

Shipping Address

If you need to send materials to a different address, please specify the alternate shipping address in the "Ship To" section when converting the quotation to a sales order.

Dispatch Date

The order date will also be automatically generated by the system; this is the date on which the sales order was created.

Delivery Delays

If delivery cannot occur on the scheduled dispatch date, the extra amount charged for expedited processing will be credited back to your account as a credit note.

1.2.3 Special Cases: Color Customization

For colour customization, please follow these guidelines:



Choose Your Color

Select your desired color from our Asian Paint color book.

1.2.4 Process for placing an order for custom color

Place the order with the item name "Paint Sample" and include the colour code from the Asian Paints colour book. If you are sending a physical sample, please provide the docket details of the courier.

Examples

Sr.	Item Code/Name	Area	Location	Description	Unit
1	<input type="text" value="Paint Sample"/>	<input type="text" value="Select Area"/>	<input type="text" value="Select Location"/>	<input type="text" value="L2290"/>	<input type="text" value="NOS"/>
<input type="button" value="+ Add Item"/> <input type="button" value="+ Add Item From Design"/>					

Sr.	Item Code/Name	Area	Location	Description	Unit	HSN Code	Qty
1	<input type="text" value="Paint Sample"/>	<input type="text" value="Select Area"/>	<input type="text" value="Select Location"/>	<input type="text" value="Mahavir
12345678"/>	<input type="text" value="NOS"/>	<input type="text" value="85361010"/>	<input type="text" value="1"/>
						Total Qty :	<input type="text" value="1"/>
<input type="button" value="+ Add Item"/> <input type="button" value="+ Add Item From Design"/>							

Customisation Fee

A one-time charge of **₹1,000** applies for colour customisation. This fee is applied when you place the order for the customised colour sample piece. We provide a 2M Acrylic sample in the requested colour.

Approval Process

We will respond by the next business day after placing the order for the paint sample or receiving the paint shade sample, regarding the approval of your selected colour.

Sample Requests

If you want us to send a sample piece, please coordinate with our account manager.

To order a complete TI or dummy, select the customised colour option in the portal and provide the colour code.

Cost Example

For instance, if you choose a green colour for a single panel, the cost for that sample will be ₹1,000. Once the colour is approved by the customer, you can place an order through the portal, selecting the customised colour and specifying the colour code or reference. The touch cost will be calculated based on the customised colour.

Customize material

If the order is related to marble or wood, and you wish to make a touch to the material provided, please mention the docket details in the sales order terms and conditions, indicating that these are the docket details for the material.

In the case of custom materials, the order will be approved only after we receive the material at our end.

If you choose to proceed with Smart Node material, we offer one standard veneer and one standard quartz marble, for which we will provide the touch. The dispatch time will remain the same as mentioned in the above delivery schedule table.

Production and Delivery

After the approval of the selected color, we will commence production and deliver the customized color panel according to the specified dispatch time.

1.2.5 Your Firm's Logo on the Panel

The Smart Node logo is permanently positioned on the bottom right side of the panel. If you would like to include your company logo, we can design it on the bottom left side of the panel. The cost for adding your company logo is ₹300 per panel and the Height of the logo will be maximum 10MM.

2. Order Placement

2.1 Lead Order in CRM

Log In : Partners log in to the CRM using their credentials.

GENERAL

- Home Page
- CRM**
- Leads
- Lead Quote List
- Sales Order List
- Direct Orders
- Pending Approval Lists
- Reports

Lead

+ Add Lead Step 2

Lead Type: ALL | Lead Status: ALL | Lead Source: ALL | Assigned Channel Partner: ALL | Assigned Employee: ALL

Created By: ALL | From Date: dd----yyyy | To Date: dd----yyyy | Next Followup Order By: NONE

Lead List

Show 25 entries | Search:

Action	Lead Code	Lead Status	Next Follow-up	Contact Person	Contact No.	Lead Type	Assign Employee	Assign Channel Partner	Create_BY
	LD-6005	WIN	03/12/2024	9429348748	9429348748	B2C	SN002 - Parth Shah	ABC	Parth Shah (EMPLOYEE) [03/12/2024 05:46 PM]
	LD-5980	OPEN	30/11/2024	parth shah	0000000000	B2C	SN002 - Parth Shah	ABC	Super Admin (SUPER ADMIN) [30/11/2024 03:14 PM]

Step 1 : Go to the **CRM** and Select the **Leads**.

Step 2 : Add New Lead: Click on the **+ Add Lead** button.

GENERAL

- Home Page
- CRM**
- Direct Orders
- Pending Approval Lists
- Reports

Lead

Add Lead

Lead Type*: B2C | Lead Source*: Select | Lead Stage*: Select

Estimate Value: | Closing Date: dd----yyyy | Project Size*: Select | Project Type*: Select

Winning Stage*: Select

Region*: WESTERN REGION | Zone*: Gujarat | Sub-Zone*: Vadodara (Baroda)

Assigned Employee*: SN121 - RajeshKumar Bhavsar | Scheme: Select

Name*: | Contact Person*: | Email: |

Contact No*: | Profession: Select | Product Interest: Select | Date of Birth: dd----yyyy

Address: Country*: India | State*: Gujarat | City*: Vadodara | Pin Code: |

Address*: |

Submit Step 4

Step 3 : **Fill** in Lead Information

Step 4 : Please review all entered information for accuracy.

Click **Submit** to save the lead in the CRM.

Lead Generated

Once submitted, a lead is generated with a unique lead code number. By following these steps, you will ensure that all necessary information is captured when adding a lead to the CRM.

Open the Lead

Open the lead from the list to view its details.

At	Status	Follow-Up	Attachment	By
30-11-2024 03:14 PM	OPEN	Lead Created By SUPERADMIN		Super Admin

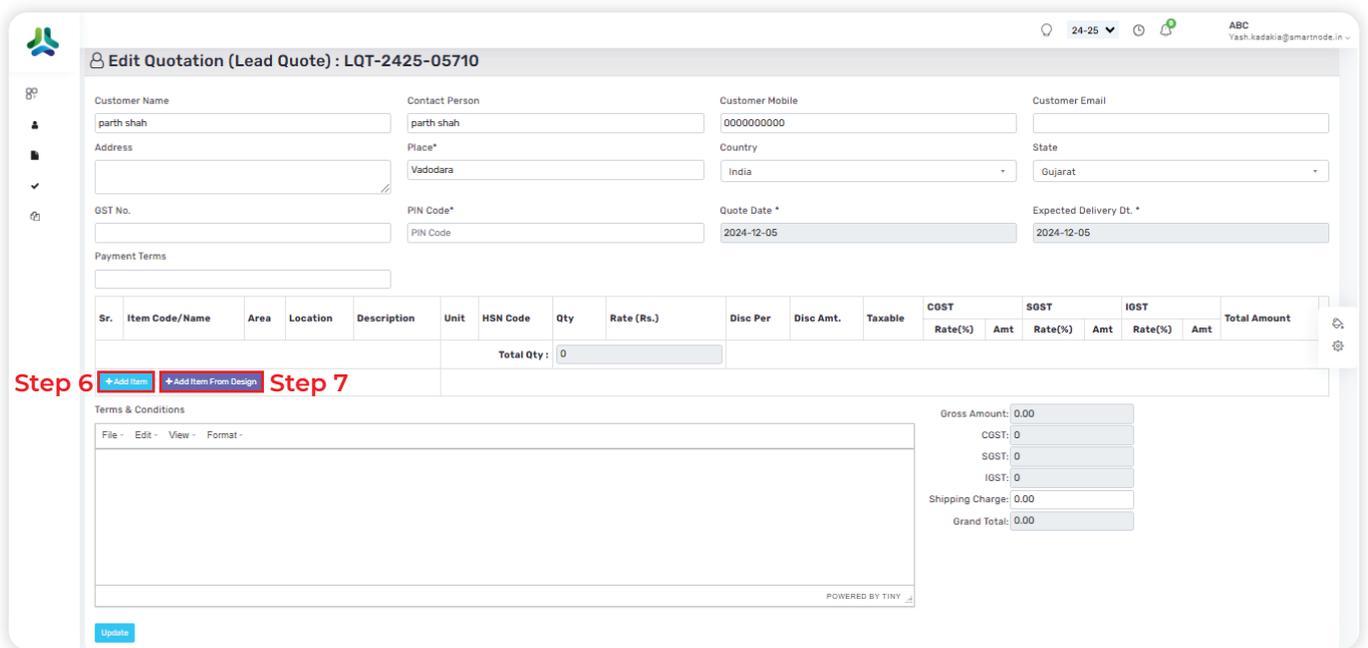
Add Quotation

Action	Quote Number	Party Name	Quote Date	Expected Delivery Date	Total Amount	Approval Status	Sales Approval	IS_SO	SO_Status	Create_At	Create_BY
--------	--------------	------------	------------	------------------------	--------------	-----------------	----------------	-------	-----------	-----------	-----------

Step 5: Click on the **+Quotation** button.

The system will auto-fill information from the lead.

Add items in Quotation



Step 6 : Backend Devices: Click on **+Add Items** and select the required backend devices.

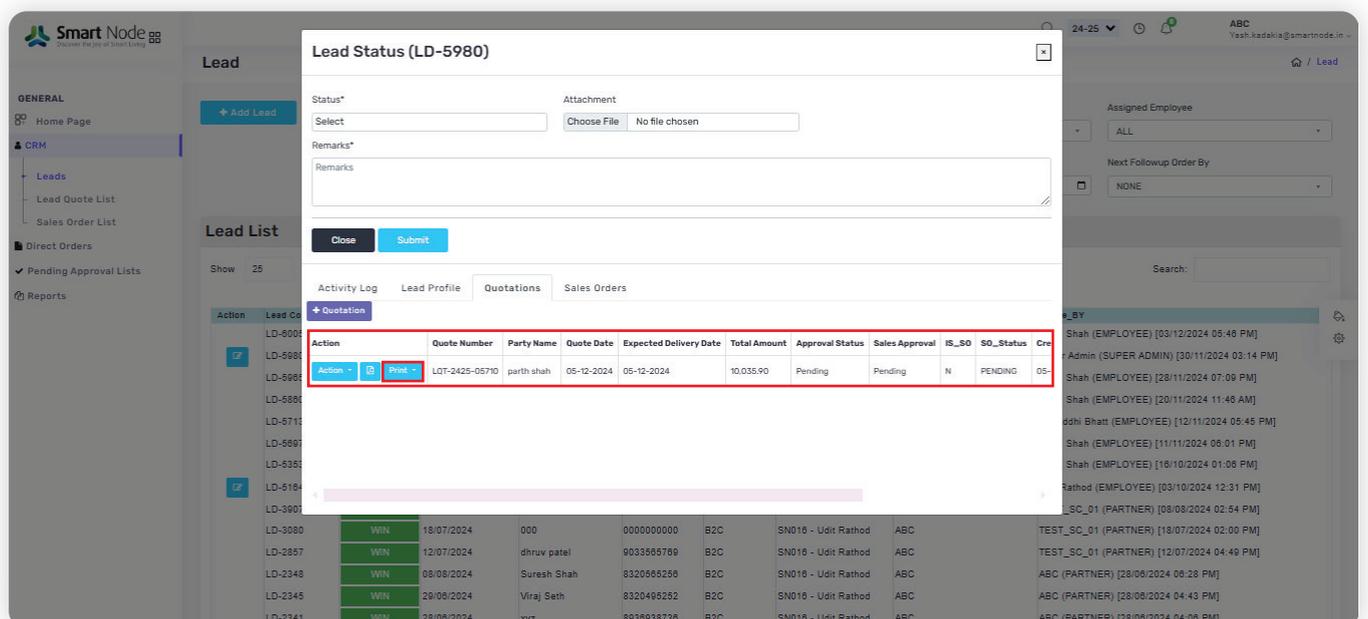
Step 7 : Design Items : Click on **+ Add Items from the design** section and include the required touch panel items.

PDF Upload: Upload the relevant PDF files for the quotation.

Area and Location: Ensure to select the area and location (this is mandatory).

Once all the required information is filled and updated, the system will generate the quotation with a unique quotation number.

Quotation : Preview



Locate the quotation you want to preview and click on the PDF icon to view the quotation,

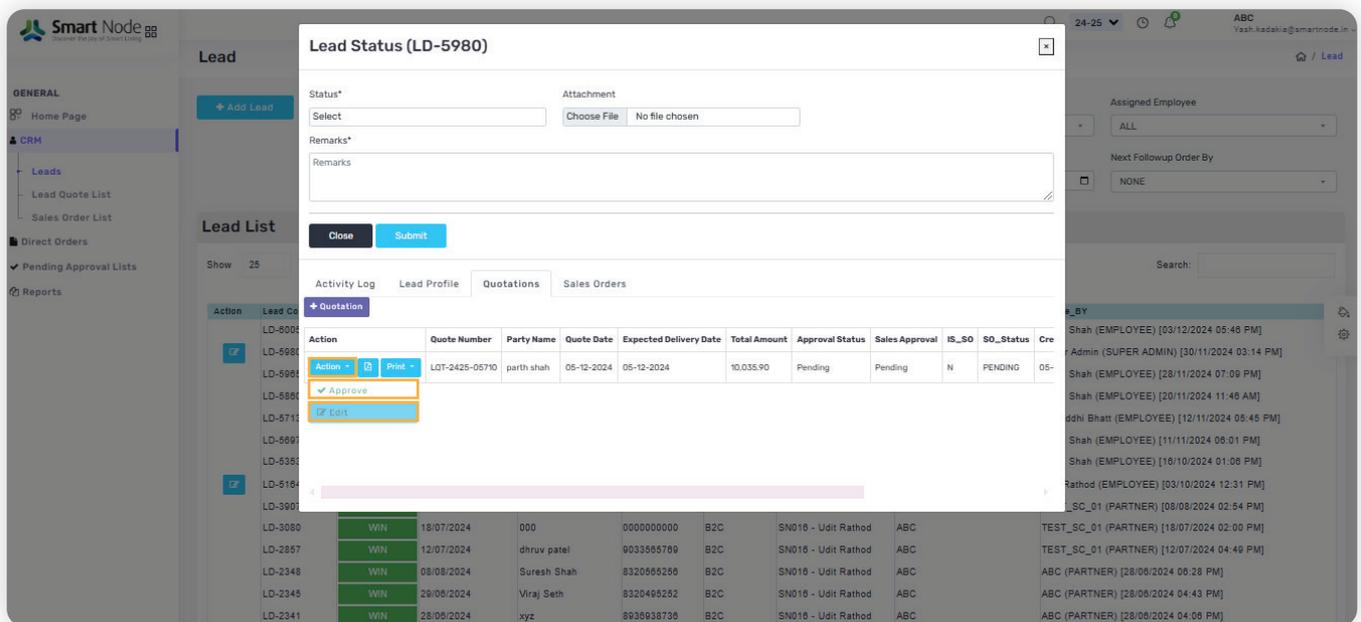
Tap Print Options.

- With Design:** Select this option to print with the design elements included.
- Without Design:** Select this option to print without design elements.

For Quotation approval

Tap Action for Quotation (Two options will Appear)

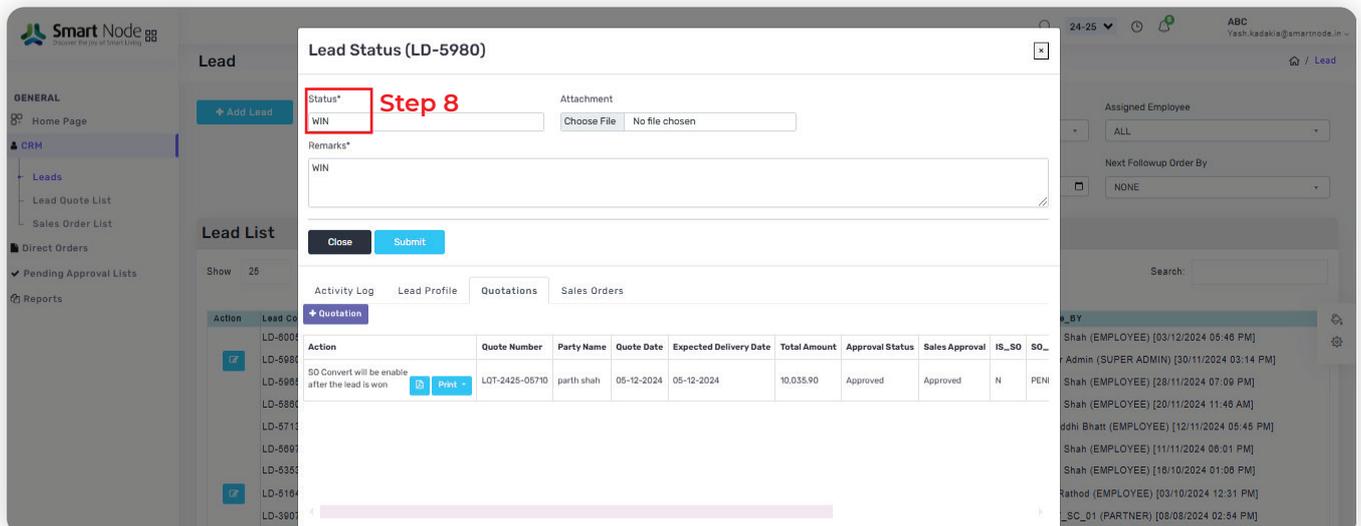
- Approve Quotation:** To approve the quotation, choose the Approve option.
- Edit Quotation:** If you need to make changes to the quotation, select the Edit option.



After the quotation is approved, navigate to the specific lead.

Step 8: Change the lead status to "Win" (this step is mandatory).

Edit Quotation: If you need to make changes to the quotation, select the Edit option.



Once the lead status is updated to "Win", you will get the option to Convert to SO (Sales Order).

Lead List

Show entries Search:

Action	Lead Code	Lead Status	Next Follow-up	Contact Person	Contact No.	Lead Type	Assign Employee	Assign Channel Partner	Create_BY
	LD-6005	WIN	03/12/2024	9429348748	9429348748	B2C	SN002 - Parth Shah	ABC	Parth Shah (EMPLOYEE) [03/12/2024 05:46 PM]

Step 9 : Select the Convert to SO option. You will get two options

- +SO for Back-ends
- +SO for Fron-ends

Step 10 : Select the appropriate option based on your requirements.

Lead Activity (LD-6196)

Activity Log | Lead Profile | Quotations | Sales Orders

Action	Quote Number	Party Name	Quote Date	Expected Delivery Date	Total Amount	Approval Status	Sales Approval	IS_SO	SO
<div style="border: 1px solid red; padding: 2px;"> Step 9 + Convert To SO </div>	LQT-2425-05900	azaz monin	12-12-2024	12-12-2024	6,775.95	Approved	Approved	N	PE
<div style="border: 1px solid red; padding: 2px;"> Step 10 + SO for Front-End + So for Back-End </div>									

[Close](#)

For **+SO for Touch**

Step 11 : Select Urgency*: Specify the urgency level for the order.

Step 12 : Billing and Shipping Address : Enter the billing and shipping addresses.

ABC Yash.kadakia@smartnode.in

Add Sales Order (Lead SO - SO for Touch)

Customer * ABC Contact Person * Yash Kadakia GST No. 29AAFFP0267H123 Order Dt. * 2024-12-05

Expected Delivery Date 10-12-2024 PO No. PO Date Payment Terms

Document File (Ref. Client PO) img/Pdf Choose File No file chosen

Urgency* Normal

Step 12 Bill To Details Bill To Party Name* ABC

Step 11 Select Urgency Normal Urgent Immediate

Step 12 Ship To Details Select Shipp To Address- ABC

Address Line 1.2 A/09/02/B.SmartNode Automation Pvt Ltd Kamdhenu Estate

Place* Vadodara Pin code 390016 Buyer State Code* Gujarat

Sr.	Item Code/Name	Description	Unit	HSN Code	Qty	Rate (Rs.)	Disc Per	Disc Amt.	Taxable	CGST Rate(%)	CGST Amt	SGST Rate(%)	SGST Amt	IGST Rate(%)	IGST Amt	Total Amount
1	TLBSIR + TYPEC + USB + 13ASKT	[Size: 12 Module, Modular/Panel: Panel]	NOS	85361010	4	10369.92	0	0.00	41479.68	0	0.00	0	0.00	0	0.00	41479.68
2	TLBSIR + USB + TYPEC	[Size: 8 Module(Horizontal)]	NOS	85361010	1	9273.9391	0	0.00	9273.94	0	0.00	0	0.00	0	0.00	9273.94
Total Qty:					5											

Step 13 : After filling in all required information, scroll to the bottom. Click Update to save and generate the Sales Order.

For Channel Partner :

The process concludes at this stage for the Channel Partner.

For Sub-Channel Partner:

The order will be forwarded to us once the assigned Channel Partner accepts the sales order.

2.2 Important Guidelines

Partner Acceptance

All orders must be placed through partner acceptance only. Please note that Sales Heads and Regional Sales Managers (RSMs) are not authorised to place orders. Do not share your ERP login ID and password with anyone.

Financial Responsibility

Once an order is placed by a partner, it is their responsibility to ensure the payment of the bill amount to the company.

Order Processing

When an order is placed in the ERP, it will be processed by the system. If there are any outstanding dues, the system will not accept the order, and it will not proceed to production.

Once the order is confirmed by the system, it will move to production, and no changes will be accepted after system approval. A WhatsApp notification will also be sent to the relevant person upon order approval.

Your sales order may be rejected or placed on hold during processing for the following reasons:

- The details to fulfill the order are missing like approval of paint sample, details of curtain track.
- If paint sample order is not placed in customized colour.
- “Ship to” address is not proper.

Dispatch and Tracking

The order will be dispatched according to the timeline provided by the system.

Order Status	Approval Status	Dispatch Status	Last Update On
Open	Approved	N	03-12-2024 05:31 PM
Open	Approved	Y View	18-09-2024 10:28 AM

If any technical issues arise with the order, production may need to dispatch it partially. To confirm whether the order has been partially or fully dispatched, you can check the sales order page in the CRM.

Order Status	Approval Status	Dispatch Status	Last Update On
Open	Approved	P View	15-10-2024 01:52 PM
Open	Approved	P View	04-10-2024 02:51 PM
Open	Approved	P View	30-09-2024 06:17 PM

If you find any item missing, please cross-check the order status, as it may be that another parcel is on the way.

All tracking details will be updated in the ERP by 11 AM the following day.

SR No.	Item Code	Item Description	Order Qty	Issue Qty	Remain Qty
1	0000002010	ARIVA_13A - OPEN	26 NOS	26	0

Invoice Number	Date	Transporter Name	Transporter Number	Bill No
RTGP24250983	09/11/2024	mahavir	160420223617	

Identification

The Sales Order Number (SO Number) will be written on the delivery box to identify the corresponding customer order.

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 info@smartnode.in

 A-09-02-B, Kamdhenu Industrial Estate,
Opp. Gorwa Water Tank, Gorwa,
Vadodara - 390016