

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

- HomeLink Pro
- HomeLink
- IR blaster and Emmiter

• Curtain Track

• Accessories

1.1.1 Delivery Time Schedule

Legend: S - Same Day Dispatch

Sr No	Order placin	g Condition	Dispatch day
51. 140.	Time	Quantity	Dispatch day
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	Paint Sample	Select Area	Select Location	L2290	NOS
÷	Add Item From Design				

9	Sr.	Item Code/Name	Area	Location	Description	Unit	HSN Code	Qty
1		Paint Sample	Select Area	Select Location	Mahavir 12345678	NOS	8536101(1
							Total Qty :	1
	+/	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.

Smart Node E								Q 24-25 ·	•	Ċ	ABC Yash.kadakia@smartn	iode.in ~
	Lead										命 /	Lead
GENERAL 89° Home Page	+ Add Ste	Lead p 2	Lead Type ALL Created B	y	ead Status ALL - From	Lead Soc ALL Date	urce T	Assigned Cha ALL To Date	innel Part	ner T	Assigned Employee ALL Next Followup Order By	-
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		LD-6005	WIN	03/12/2024	9429348748	9429348748	B2C	SN002 - Parth Shah	ABC		Parth Shah (EMPLOYEE) [03/12/2024 05:46 PM]	
	8	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.

	III Lead						
0	Add Lead						
	Lead Type*		Lead Source*		Lead Stage*		
s proval Lists	B2C		Select		Select		
	Estimate Value		Closing Bate		Project Size*		Project Type*
			ddynny		Select		Select
	Wiring Stage*						
	Select						
	Region*		Zone*			Sub-Zone*	
	WESTERN REGION		- Gularat			Vadodara (Baroda)	
Step 3	Assigned Employee* SN121 - Rajeshkumar Bhavsar		Scheme - Select		*		
	Name*				Contact Person*		Email
	Contact No*		Profession		Product Interest		Date of Birth
			Select		Select		ddyyyyy
	Address						
	Country*		State*		City*		Pin Code
	India	-	Gujarat	•	Vadodara	•	
	Address*						

- 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.

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- Sales Order List												
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Add Quotation

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+ Leads	Rema	rks												
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එ Reports	+ Quot Action	tation Quote	Step	Party Name	Quote Date	Expected Delivery Date	e Total Amount	Approval Status	Sales Approval	IS_SO	S0_Status	Create_At	Create_BY	LOYEE) [03/12/2024
														PER ADMIN) I PM] LOYEE) [28/11/2024
														LOYEE) [20/11/2024
	3													5 PM] LOYEE) [11/11/2024

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

The system will auto-fill information from the lead.

Add items in Quotation

Customer Name				Contact Pers	on			Customer Mo	sile				Customer Ema	ul			
parth shah				parth shah				000000000									
Address				Place*				Country					State				
				Vadodara				India				*	Gujarat				
GST No.			li	PIN Code*				Quote Date *					Expected Deliv	very Df	ıt. *		
				PIN Code				2024-12-05					2024-12-05				
Sr. Item Code/N	e Area	Location	Descripti	on Unit	HSN Code	Qty	Rate (Rs.)	Disc Per	Disc Amt.	Taxable	COST	s	OST	1	IGST		Total Amount
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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

Smart Node BB		Load Shahua (L D. 5000)							0	24-25 👻	· ©	C	ABC Yash.kadakia@smartnode.in y
	Lead	Leau Status (LD-3960)							×				ଜ / Lead
GENERAL		Status*		Attachment							А	ssigned En	nployee	
8° Home Page	+ Aud Lead	Select		Choose File	e No file chosen						- T	ALL		•
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	LD-5881										Shah (EMF	PLOYEE) [20/11/2024 11	:46 AM]
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	LD-535										Shah (EMF	PLOYEE) [18/10/2024 0	1:06 PM]
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	LD-234	WIN	08/08/2024	Suresh Shah	8320565256	B2C	SN016 - Udit Rathod	ABC		ABC	(PARTNER)	[28/06/20	24 06:28 PM]	
	LD-234	WIN	29/08/2024	Viraj Seth	8320495252	B2C	SN016 - Udit Rathod	ABC		ABC	(PARTNER)	[28/06/20	24 04:43 PM]	
	LD-234		28/06/2024	xyz	8936938736	B2C	SN016 - Udit Rathod	ABC		ABC	(PARTNER)	[28/08/20	24 04:06 PM]	

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.

Smart Node BB	Lead	Lead Status (LD-5980)								×	24-25	• 0 \$	ABC Yash kadakia@	smartnode.in ~
GENERAL 8 ⁰ Home Page	+ Add Lead	Status* Select Remarks*	Attachmen Choose Fil	e No file chosen							•	Assigned Employee		•
- Leads - Lead Quote List		Remarks								1		Vext Followup Orde	Ву	•
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f ⁷ Reports	Action Lead Co LD-600	Action Quote Number Action Quote Number Anime 12 Print 1 101-2425-0576	Party Name Quote Date	Expected Delivery Date	Total Amount	Approval Status	Sales Approval	IS_S0	S0_Status	Cre	e_BY Shah (EM r Admin (S	PLOYEE) [03/12/2 UPER ADMIN) [30/	024 05:48 PM] 11/2024 03:14 PM]	\$. @
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	LD-234	1 WIN 28/06/2024	xyz	8936938736 B2C	2 SM	1016 - Udit Rathod	ABC			ABC	(PARTNER) [28/08/2024 04:4	5 PM]	

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.

Smart Node III	Lead	Lead Status (LD-5980)							2 ×	4-25 💙 🕚	e :	ABC Vash.kadakia⊚smartnode.i ⋒ / Lead	n ~
GENERAL 87 Home Page 4 CRM - Leads - Lead Quote List	+ Add Lead	Status* Step 8 WIN Remarks*	Attachmen Choose Fi	it No file cl	hosen						Assigned I ALL Next Follo	Employee wup Order By	*	
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Once the lead status is updated to "**Win**", you will get the option to Convert to SO (Sales Order).

Lead	List									
Show	25	entries						Searc	:h:	
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.

JS Smart No	1					0 24-25	× 0 0		AE	BC Ish.kadakia@smartnoo	de.in ~
Discover the Joy of Smar	Lead Activity (LD-6196)								×	ଜ / Le	ead
GENERAL	Activity Log Lead Profile Qu	otations Sal	es Orders							ployee	
L CRM	Action Step 9	Quote Number	Party Name Quote Dat	e Expected Delivery Date	e Total Amount	Approval Status	Sales Approval	IS_SO	SO	*	
- Leads	+ Convert To SO 🔻 🖪 🛛 pdf 🍸 🛛 Print 🔻	LQT-2425-05900	azaz monin 12-12-202	4 12-12-2024	6,775.95	Approved	Approved	N	PE	o Order By	
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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.

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Add Sales Order (Lead SO - SO for T	ouch)																	
Customer *		Contact F	Person *				GST No.					Order	Dt. *						
ABC	*	Yash Ka	adakia			Ŧ	29AAFFP0267H1ZJ					2024-12-05							
Expected Delivery Date		PO No.	POI					P0 Date Paym						Payment Terms					
10-12-2024																			
Document File (Ref. Client PO) Ir	ng/Pdf	Urgency*																	
Choose File No file chosen		Normal]		St	:ep 12	2								
Bill To Details Bill To Party Name*	Step 12	Select U	t Urgency Step 11					Ship To Details -Select Shipp To Address-						GST No.*					
ABC		Normal					ABC					29AAFF	P0267H1ZJ						
Address Line 1,2		Urgent					Address Line 1,2												
A/09/02/B,SmartNode Automat Kamdhenu Estate	ion Pvt Ltd	Immedia	te				A/09/02/B.SmartNode Automation Pvt Ltd Kamdhenu Estate												
A/09/02/B,SmartNode Automat Kamdhenu Estate	ion Pvt Ltd						A/09/02 Kamdhe	2/B,SmartNode <i>l</i> inu Estate	Automation Pvt	Ltd									
Place*	Pin code			Buyer State Co	de*	//	Place*			Pin co	de			Buyer Sta	te Code*				
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										COST		SGST		IGST					
Sr. Item Code/Name	Description		Unit	HSN Code	Qty	Rate (Rs.)	Disc Per	Disc Amt.	Taxable	Rate(%)	Amt	Rate(%)	Amt	Rate(%)	Amt	Total Amo			
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2 TL8S1R + USB + TYPEC Size: 8 NOS NOS		85361010	1	9273.9395	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	000002010	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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 Opp. Gorwa Water Tank, Gorwa,
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