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# PROJECT REPORT

## *Development of MIS for the Sales Function of G.S. Auto International Limited*

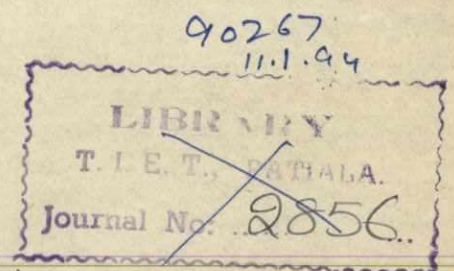
Prepared by :

1. JASBIR S. RYAIT
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Guide :

Prof. P.L. BALI

1986



Department of Mechanical Engineering  
THAPAR INSTITUTE OF ENGG. & TECH. PATIALA 147001  
(Deemed University)

PROJECT REPORT

DEVELOPMENT OF MIS FOR THE SALES

FUNCTION OF G. S. AUTO INTERNATIONAL

LIMITED

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Prepared by:

1. JASBIR S. RYAIT
2. ASHOK GUPTA

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(A Deemed University)

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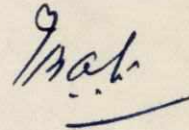
CERTIFICATE BY THE GUIDE

Certified that the project intitled "DEVELOPMENT OF MIS FOR THE SALES FUNCTION OF M/S G.S. AUTO INTERNATIONAL LTD." is a record of the work done by the following students,

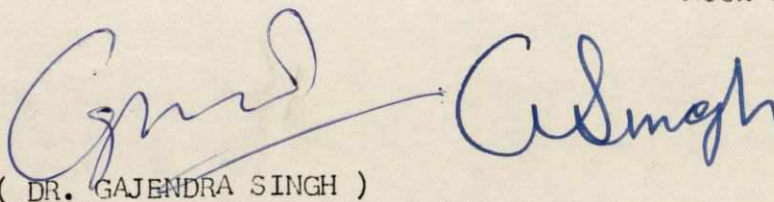
1. JASBIR S. RYAIT
2. ASHOK GUPTA

under my supervision. This work is being submitted in partial fulfillment of the award of B.E. (INDUSTRIAL) Degree of Thapar Institute of Engineering & Technology Patiala to them and has not been submitted for award of any other degree.

Date \_\_\_\_\_



( Prof. P. L. Bali )  
Assistant Professor,  
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### ACKNOWLEDGEMENT

1. We wish to place on records our thanks to Prof. P.L. Bali, our Guide, for his help in identifying the Project & his constant guidance and encouragement thereafter.
  
2. We are indebted to M/S G.S. AUTO INTERNATIONAL Ltd., Ludhiana, for reposing the confidence in us. We are grateful to S. Jagat Singh, Managing Director, for his deep involvement in the various phases of the study and for providing fullest co-operation and help.
  
3. Our sincere thanks are due to the Company's Sales Manager , Financial Controller , Asstt. Sales Managers and office staff, for their cooperation and help rendered to us, without which the study would not have been so successful.

JASBIR S. RYAIT

ASHOK GUPTA

#### 4. INTRODUCTION

1. G. S. AUTO INTERNATIONAL LTD. was established in 1973 under the name 'Gurmukh Singh & Sons Auto Parts Pvt. Ltd.' after it was converted from a partnership concern. The company produces a wide range of Automobile Parts. The products have gained a name for their quality and as a result some of the products are consumed as OE's and lately the Company has been able to enter the export market.
2. The company is managed by a Board of Directors, headed by a Chairman. The Managing Director is responsible for the day to day management of the company and is assisted by other executives.
3. The present management of the company is very forward looking and enterprising. The operations of the company under the leadership of this management have grown in multiples. However, it has not been able to match these developments with advancements, refinements and sophistication in their way of working, specially the ways and means of collecting, storing, analysing and transmitting the management information.
4. In the recent past, the management had been considering and very rightly so, the application and the usage of the latest management tools in the working of the organisation so as to increase its efficiency.

### 3. SUMMARY OF RECOMMENDATIONS

1. Objective Statements for the function of Sales are prepared.
2. Information flow system designed.
3. Details of the various reports & formats worked out.
4. Detailed job descriptions have been prepared for operating the proposed information system.
5. The Registers/Files rendered redundant have been identified.

## 2. TERMS OF REFERENCE

After the preliminary discussions and observations the following terms of reference were arrived at :

1. To carry out detailed systems analysis of the SALES of the Organisation.
2. To identify and document the objectives for the above function.
3. To design suitable information system in line with the set objectives for the above mentioned functions.
4. To design suitable systems for the information storage and retrieval pertaining to the above function.
5. To identify various positions needed and to prepare their job descriptions to operate the designed MIS.

- 4.(b) Order recording Registers maintained by order receiving section, customer files and Agents Register with ASM contains similar data.
- (c) Order Recording Registers in order analysis section and registers maintained for DGTD reporting similar data of production (major category-wise sales figures).
- (d) Hundi Registers and Agentwise Registers contain similar data.
- (e) The management has decided to install a mini-computer. This acquisition of the computer will greatly help the management, especially in operation and organisation of the information system. The proposed information is suggested keeping in view the availability of the computer.

## 7. THE MANAGEMENT INFORMATION SYSTEM

### FUNCTIONAL OBJECTIVES

- The management needs information to decide. The decisions are taken in order to utilize the resources available to the best possible extent. The resources are to be utilized in order to achieve certain objectives. Thus, the information and objectives should be very well related; any information flow system designed without clearly identifying the organisational/functional objective will not serve any purpose. It is with this in view that the following objectives have been identified for the specific functions, in consultation with the management.

### MARKETING, SALES & BILLING

The objectives for this function, which have a bearing on the objectives of the organisation could be stated as follows.: This list has such objectives only which are quantifiable and therefore, achievable and controllable. The other objectives could be added to it :

- (a) To understand the total market of the company's product and to decide and to make efforts to achieve certain share of the market by fixing targets on a periodical basis.
- (b) To decide and make efforts to achieve a definite target of the sales turnover in a defined period of time in a defined market such as Replacement, Export etc.
- (c) To understand the causes of the customer's complaints and to make efforts to reduce them to a defined level; and to reduce the cash collection period to a pre-determined time.

Contd..../-

- (d) To comply the orders as per the delivery schedule and to maintain the records pertaining to the function.

#### INFORMATION FLOW SYSTEM

- (a) Based on the objectives as mentioned above, the decisions expected to be made by the various levels of the management and thus their information needs a detailed information system. The Information network is as given in Appendix-B.
- (b) The details of all the reports, most of which have already been implemented; such as the frequency, no. of copies made, initiator, receiver, the due date and purpose served are given in the Form Description Sheets, which alongwith the formats of the report are given in Appendix-C. A summary of the Information Flow, its periodicity & purpose served is given in the table below.

#### THE BUSINESS PLAN

The proper information flow will help the management to decide on a rational basis as well as in time. However, in the absence of any prefixed targets which are to be achieved, all this exercise will be futile. Keeping this in view, a formal business plan was got made.

#### ORGANISATION & OPERATION OF MIS

1. The most important link in the operation and organisation of the designed MIS is the human element. The Form description sheets as given in the Appendix-C, give in detail the procedure of preparation of each of the report. However, for the smooth operation of the documentation generation and flow of information, it is desirable to assign the specific tasks in the company.

Contd...../-

2. The job descriptions as given in Appendix-D, describe in detail the responsibilities of each of the person. These duties and responsibilities have been categorised in three main categories viz.

- A) To be continued.
- B) Proposed.
- C) To be deleted.

'To be continued' are the duties which are being performed at present and will be required in future also. The second category duties are the 'proposed' ones, which are necessary for the organization and operation of the proposed information system. The last category duties 'to be deleted' include those duties which are not more necessary to be performed. The job description sheets also give such details as to the number of such jobs existing at present and the number proposed. The table overleaf gives the necessary changes in manpower.

## 8. GENERAL RECOMMENDATIONS

1. In order to arrive at a rational product mix and a pricing policy, the management should have detailed knowledge of the cost break-up of each of the products. It is, therefore, recommended that the costing of the various products could be carried out and the data made available to the management for deciding the product mix, pricing policy etc. on the basis of the contributions made by each product. This will also help the management in concentrating its attention on the vulnerable high cost areas.
2. The company is poised for rapid growth in the future in which it will only be successful if the management & other executives of the company share more important responsibilities and authorities; it is also necessary to create and adhere to unity of command which will avoid any duplication of the work and hence, confusion.
3. In order to keep the balance between the increased expectations from the employees and executives and their present level, it is imperative to identify the training needs and to impart necessary training to them in order to improve their skills and efficiencies.

## REPORTING FORMATS

### DEFINITION & NEED

A REPORTING FORMAT IS ANY STANDARDIZED COMMUNICATION THAT IS AN ESSENTIAL LINK IN AN OPERATING PROCEDURE.

The reporting formats help in furnishing information for a subsystem and produce outgoing information to be used by another subsystem or an end user.

### REQUIREMENTS OF A GOOD FORMAT

1. The form should be attractive and easy to read.
2. The form should have a title which specifies the function of the form.
3. Forms should have an identification no: with the date of issuance.
4. The items should be so arranged such that there is a logical flow from left to right and from up to bottom. The reporting forms usually gave summaries in the right columns and bottom rows.
5. When extreme emphasis is on accuracy, large boxes, easily blocked section and lot of open space help.
6. Consider coloured ink for captions to make variable data stand out. Coloured ink may also be used for serial identification no:
7. Detailed instructions, where as required, on how to fill the form may be printed on the back.
8. Routing instructions for each copy may be indicated by using a different colour paper for each copy and printing routing instructions on the margin.

9. Standard form sizes should be used.
10. If the form is to be placed in a binder, leave adequate blank space at the top or sides.
11. When multiple copies of a form are desired, they may be obtained in several ways. Multiple sheets may have carbon interleaves or special no-carbon-required paper may be used

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8. MINTZBERG , HEWER      The Structuring of Organisation.
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## DETAILED DESCRIPTIONS OF THE REPORTS

S.NO.	NAME OF REPORT	CODE	FREQUENCY	PREPARED BY :	SENT TO :	USES
1	2	3	4	5	6	7.
1.	Goods lying at Bombay	EW-1	Weekly	Asst. In Export deptt	M.D.	To control Export consignments.
2.	Export Pending Orders Report.	EM-1	Monthly	- do -	- do -	To follow up pending export orders
3.	Quarterly Export Sales Report (Country & Prod. wise)	EQ-1	Qtly	Export deptt.	- do -	To know country wise product wise sales.
4.	Export trend Report (Prod. wise)	EY-1	Yearly	- do -	- do -	To understand export trend (Prod. wise)
5.	Export trend report (Country wise)	EY-2	Yearly	- do -	- do -	To understand export trend (Country wise)
6.	Outstanding Report	FF-1	Fortnightly	A.O.	S.M.	To monitor Outstanding payments & follow up
7.	Finished Goods Inventory status	FM-2	Monthly	store incharge	M.D./S.M.	To plan & control finished goods inventory.
8.	Monthly Sales Report Mkt. segment wise	FM-3	Monthly	A.O.	M.D.	To plan & control sales promotion efforts for various markets segments.
9.	Price Variance Report	FM-4	Monthly	Purchase Acctt.	M.D.	To review product prices.
10.	Daily Sales Status Report	ID-1	Daily	A.O.	M.D.	To review daily sales position.
11.	Demand & Supply Report	IM-1	Monthly	S.I.	MO/S.M/W.M.	To know monthly demand & sales position

1	2	3	4	5	6	7
12.	Inland (Replacement) Pending Orders Report	IM-2	Monthly	S.I.	ASM/SM.	For follow up & action.
13.	Inland (Mktg. Segmentwise) Pending Orders Report	IM-3	Monthly	S.I.	SM/M.D.	To know pending orders position.
14.	Monthly Sales Report (Prod.wise)	IM-4	Monthly	S.I.	SM/M.D.	To know & plan monthly sales product wise
15.	Monthly Sales Report Agent-wise.	IM-5	Monthly	ASM	SM/M.D.	To review Agents/ASM's performance & plan for future strategies.
16.	Consolidated Report Misc. Information	IQ-1	Qtly	S.M.	M.D.	To review sales' performance.
17.	Customer's Complaint report.	IQ-2	Qtly	ASM.	SM/M.D.	For analysing customers complaints & to take corrective action.
18.	Sales Trend Report (Prod.wise)	IY-1	Yearly	S.I.	M.D/SM.	To know productwise sales growth for future planning.
19.	Sales Trend Report Agentwise	IY-2	Yearly	ASM	M.D/SM.	To know agentwise sales for agents performance appraisal & setting targets in future.
20	Agentwise Sales Report	IY-3.	Yearly	ASM.	SM/M.D.	To review agents/ASM's performance & plan for future strategies.

Form Code	Title	No. of copies	Frequency
EW-1	Goods lying at Bombay	2	Weekly
Initiator Asst. in Export Dept.	To be sent by 2nd day of every new week		Distribution CE/MD

1. Purpose : To control export consignments
2. Form Description
  - a) Serial No. : Numerical serial no. is ascending order.
  - b) Bill No. & Date : Refere to the order no. & date given on the order.
  - c) Amount : It is the amount in rupees billed to the customer given in sales invoice.
  - d) Name of Buyer : Refers to the customer's name.
  - e) Country : Name of country to which goods are sold.
  - f) No. of Cases : The total no. of boxes in which the goods are despatched.
  - g) GR No. & Date : A no. & date given by Despatch clerk.
  - h) LC No. & Date : The Letter of Credit No. & its date.
  - i) LC Validity : The date till which Letter of Credit is valid.
  - j) Action/Remarks : Any action to be taken by management.
3. Other Instructions
  - Format Size : Full Scap.
  - Storage Form : File.

GOODS LYING AT BOMBAY PORT AS ON \_\_\_\_\_

S. NO.	BILL # & DATE	AMT.	NAME OF BUYER	COUNTRY	NO. OF CASES	G.R. # & DATE	L.C # & DATE	L.C VALIDITY	ACTION/REMARKS

Form Code	Title	No. of Copies	Frequency
EM-1	Export Pending Order Report	3	Monthly
Initiator	To be sent by	Distribution	
Astt. Export	2nd day of every new month	CE/MD/Planning Engr.	

Purpose To follow-up pending export orders

Form Description :

a) Serial Number : Numerical serial no. in ascending order.

b) Order Proforma No./ Invoice No, : Referes to the number given on sales invoice.

c) Date : Date on which order is received.

d) Amount : Value of the order amount.

e) Name of Buyer : Name of purchaser.

f) Country : Name of the country to which goods are sold.

g) Delivery date for factory : The date on which the goods are asked to be delivered by the purchaser.

h) LC No. : Letter of Credit No.

i) Validity : Date upto which Letter of Credit is valid.

j) Ext. Date : The date extension of Letter of Credit.

k) P/Credit availed : Packing Credit availed amount.

l) Remarks : Remarks for order to be pending.

Other Instructions

Format Size : Full Scap.

Storage Form : File.

EXPORT PENDING ORDERS REPORT FOR THE MONTH OF \_\_\_\_\_ YEAR \_\_\_\_\_

S. NO.	ORDER # (INVOICE)	DATE	AMT.	NAME OF BUYER	COUNTRY	DELIVERY DATE FOR FACTORY	LC #	VALIDITY	EXT. DATE	P/CREDIT AVAILED	REMARKS.

Form Code	Title	No. of Copies	Frequency
EQ-1	Quarterly Export Sales Report (Country and Product wise)	3	Quarterly
Initiator	To be sent by	Distribution	
Asst.(Export)	1st week of every new quarter	CE/MD/Computer Deptt.	

1. Purpose : To know country-wise & product-wise sales.
2. Form Description
  - a) Country's Name : The name of the countries to which goods are sold.
  - b) Product Category (Quantity) : The quantities given separately of all the product categories sold for the quarter.
  - c) Product Categories (Amount) : The amount in rupees given separately of all the product categories for the quarter.
  - d) Total Sales (Actual) : Actual sales in rupees of the countries for the quarter.
  - e) Total Sales (Planned) : Planned sales in rupees of the countries for the quarter.
  - f) Cumulative Sales (Actual) : Actual sales in rupees of the countries till current quarter.
  - g) Cumulative Sales (Planned) : Planned sales in rupees of the countries till current quarter.
  - h) Total : Give total of all the countries sale both in quantity and amount figure.
3. Other Instructions
  - Format Size : 30" x 8.5"
  - Storage Form : File.



Form Code	Title	No. of Copies	Frequency
EY-1	Export Trend Report (Product-wise)	2	Yearly
Initiator	To be sent by	Distribution	
Asst.(Export)	1st week of new financial year	CE/MD	

1. Purpose : To understand product-wise export trend.
2. Form Description
  - a) Serial Number : Numeric serial no. in ascending order.
  - b) Product : The name of product categories to be U-Bolt, C-Bolt, etc.
  - c) Yearly Sales (Qty) : The yearly sales of last 5 years are given for each product category.
  - d) Yearly Sales (Amt.) : The yearly sales in rupees value of last 5 years for each product category.
  - e) Yearly Growth Rate (Qty) :  $100 \times \frac{\text{Increase in sale(Qty) compared to last year}}{\text{Last year's Sale (Qty)}}$
  - f) Yearly Growth Rate (Amt) :  $100 \times \frac{\text{Increase in Sale(Amt) compared to last year}}{\text{Last year's Sale (Amt)}}$
  - g) Remarks : Whether growth trend is increasing/decreasing.
3. Other Considerations
  - Format Size : Full Scap.
  - Storage Form : File.



Form Code	Title	No. of Copies	Frequency
EY-2	Export Trend Report (Countrywise)	2	Yearly
Initiator	To be sent by	Distribution	
Asst. (Export)	1st week of every new year	CE/MD	

1. Purpose : To understand countrywise export trend.
2. Form Description
  - a) Serial Number : Numeric Serial No. is ascending order.
  - b) Country : The name of countries to whom sale is made in the year.
  - c) Yearly Sale (Amt.) : Total yearly sales in rupees of each country for last five years.
  - d) Yearly Growth in percentage :  $100 \times \frac{\text{Increase in sale (Amt) over last year}}{\text{Last year's Sales (Amt)}}$
  - e) Remarks : Refers to whether rate is increasing/decreasing.
3. Other Considerations
  - Format Size : Full Scap
  - Storage Form : File.



Form Code	Title	No. of Copies	Frequency
FF-1	Outstanding Report	2	Fortnightly
Initiator	To be sent by	Distribution	
Acctts. Officer or made on computer	1st/15th of every new month	Sales Manager	

1. Purpose : To monitor outstanding payments & follow-up.
2. Form Description
  - a) Serial Number : Numeric Serial Number in ascending order.
  - b) Customer's Name : The names of those customers whose payments are outstanding after 45 days from the date of billing.
  - c) Outstanding Invoice (Date) : The date on which Invoice was prepared.
  - d) Outstanding Invoice (No.) : The number given on Invoice.
  - e) Outstanding Invoice (Billed out) : The amount billed in the Invoice.
  - f) Outstanding Invoice (Outstanding Amt.) : The amount unpaid by the customer after the 45 days from billed date.
3. Other Considerations
  - Format Size : Full Scap
  - Storage Form : File.



Form Code	Title	No. of Copies	Frequency
FM-2	Finished Goods Inventory Status	2	Monthly
Initiator	To be sent by	Distribution	
Store Inch.(Finished Goods) or Computer	1st week of every new month	MD/SM	

1. Purpose : To plan and control finished goods inventory.

2. Form Descriptions

- a) Serial Number : Numeric Serial No. in ascending order.
- b) Finished Goods : Refers to finished goods product category.
- c) Current Month (Qty) : The average inventory in quantity of current month.
- d) Current Month (Amt) : The average inventory in amount of current month.
- e) Previous Month (Qty) : The average inventory qty. of previous month.
- f) Previous Month (Amt) : The average inventory in amount of previous month.
- g) Totals : Only amount figures are added to give total inventory in (amount).

3. Other Considerations

- Format Size : Full scap.
- Storage Form : File.



Form Code	Title	No. of Copies	Frequency
FM-3	Monthly Sales Report (Mkt. Segmentwise)	2	Monthly
Initiator	To be sent by	Distribution	
A/c Officer or made on computer	Within 10 days of every new month	MD/CE	

1. Purpose : To plan and control sales promotion efforts for various market segments.
  
2. Form Description
  - a) Market Segment : The names of different markets in which goods are sold i.e. Defence, Original Equipment manufacturers etc.
  - b) Current Sales (Amt) : Current monthly sales (Amt.) for all product categories.
  - c) Cumulative Sales (Amt.) : Sales (Amt.) from financial year to current month for all product categories.
  - d) Total Current Sales (Amt.) : Total Sales (Amt.) of each market segment of current month.
  - e) Total Cumulative Sale (Amt.) : Total Sales (Amt.) of each market segment from financial year to current month.
  - f) Total Company's Sale : Refers to total of all individual columns.
  
3. Other Considerations
  - Format Size : 30" x 8.5"
  - Storage Form : File.



Form Code	Title	No. of Copies	Frequency
FM-4	Price Variance Report	2	Monthly
Initiator	To be sent by	Distribution	
Purchase Deptt.	1st week of every new month	MD/CE	

1. Purpose : To review product prices.
2. Form Description
  - a) Material Name : The names of major raw materials i.e. Mild Steel, Alloy Steel, Furnace Oil, etc.
  - b) Units : The unit of measurement i.e. tonnes, litres etc.
  - c) Base Year (Date) : The latest date on which prices of finished goods were fixed.
  - d) Specification/Size : Refers to specification and size of the raw material.
  - e) Base Year (Price) : Raw material prices on base year data.
  - f) Current prices : Raw material prices in current months.
  - g) Variance (%) :  $100 \times \frac{\text{Increase in material price from base Yr. dt.}}{\text{Base year material price}}$
  - h) Average Monthly consumption : Monthly average consumption of each raw material.
3. Other Considerations
  - Format Size : Full Scap.
  - Storage Form : File.

PRICE VARIANCE REPORT FOR THE MONTH OF \_\_\_\_\_ YEAR \_\_\_\_\_

MATERIAL NAME	SPECIFICATION/ SIZE	UNIT	PRICE AT BASE YEAR		CURRENT PRICE	VARIANCE %	AVG. MONTHLY CONSUMPTION
			DATE	RS			
1	2	3	4	5	6	7	8
MILD STEEL -	ROUND, - 8 mm DIA. 10 12 14 16-25 28-56	TON " " " " " "					
	HEX - 21-41	"					
PIG IRON -	LM - 3 SPL	"					
	LM - 4 SPL	"					
SCRAP -							
CARBON STEEL	EN 8,9,328 C-45,60 EN-15	" "					
ALLOY STEEL	EN-16 EN-18 EN-19 EN-353						
	NON-FERROUS						
	- Cu						
	- Zn						
	- Sn						
	- Ni						
	FURNACE / FUELOIL						
	- L D O						
	- H.S.P.						

1	2	3	4	5	6	7	8
<u>LUBRICANTS</u> - CUTTING OIL - MACH. MOBIL OIL - GEN. OIL - HY. OIL - TRANFORMER OIL - QUINCH. OIL - MASTERED OIL - INDUST. GREASE - CASTOR OIL <u>CHEMICALS</u> - SOD. CYANATE - NAT. SALT - BENTONITE - PET. COKE - FERRO-SILICON - SILICA SAND <u>PAINTS</u> - GS. GREEN - RED OXIDE - ANT. BLACK - TERPENTINE OIL - THINNER <u>PACKING MAT.</u> - WATER PROOF PAPER - WAX PAPER - POLYTHENE BAGS - C. HARD BOXES - C. GARY " - WOODEN BOXES - STEEL STRIPS							

Form Code	Title	No. of Copies	Frequency
ID-1	Daily Sales Status Report	Maintained in Register	Daily
Initiator	To be sent by	Distribution	
Acctts. Officer	Daily next day (10 a.m.)	MD/CE/SM	

1. Purpose : To review daily sales position
2. Form Description
  - a) Serial Number : Numerical Serial Number in ascending order.
  - b) Date : The date of sales Invoice.
  - c) Sales Amount (Through Bank) : Total sales of the day through all the banks.
  - d) Sales (Amt.) Direct : Total direct sales of the day.
  - e) Total Amount : Addition of Direct Sales and sale through banks.
  - f) Cumulative till date : Addition of sales from month's start to that date.
  - g) Month's Total : Referes to total of sales through banks and direct only.
3. Other Considerations
  - Format Size : Full Scap.
  - Storage Form : Information maintained in a Register.

DAILY SALES STATUS REPORT FOR THE MONTH --- YEAR ---

S.NO.	DATE	(SALES AMT. IN , 000)			CUMULATIVE TILL DATE
		THROUGH BANK	DIRECT	TOTAL	
	<u>MONTH'S TOTAL</u>				

Form Code	Title	No. of Copies	Frequency
IM-1	Monthly Demand & Supply Report	3	Monthly
Initiator	To be sent by	Distribution	
Section Inch. (Order Analysis Section) or made on computer	1st week of every new month	<ul style="list-style-type: none"> <li>- MD/CE</li> <li>- Planning Engr.</li> <li>- Sales Manager</li> </ul>	

1. Purpose : To know monthly sales & demand position.
  
2. Form Description
  - a) Serial Number : Numeric Serial Number in ascending order.
  - b) Product Name : Refers to the name and brief description/size of the product.
  - c) Demand Qty. (Mild Steel & Alloy Steel) : Quantity demanded through order received in the month. Mild Steel & Alloy quantities are given in separate columns.
  - d) Supply (Qty) (Mild & Alloy Steel) : Quantity supplied during the month for both steel categories.
  
3. Other Considerations
  - Format Size : Full Scap
  - Storage Form : File.

DEMAND & SUPPLY REPORT FOR THE MONTH OF - - - - -

S.NO	PRODUCT NAME	DEMAND QTY.		SUPPLY QTY.		REMARKS
		MILD STEEL	ALLOY STEEL	MILD STEEL	ALLOY STEEL	

Form Code	Title	No. of Copies	Frequency
IM-2	Inland (Replacement) Pending Orders Report	2	Monthly
Initiator	To be sent by	Distribution	
Section Inch.(Order Analysis Section) or made on computer	1st week of very new month	Asst. Sales Manager Sales Manager	

1. Purpose : For follow-up action.
2. Form Description
  - a) Serial Number : Numeric Serial Number in ascending order.
  - b) Agent : Name of the Agent.
  - c) Orders Pending (File previous month) : The total value of pending orders in rupees thousand till previous month of each Agent.
  - d) Orders pending at the end of this month : The total value of orders pending in current month's end, of each Agent.
  - e) Orders received during this month : The total value of orders received during current month of each Agent.
  - f) Reasons : The causes of orders to be pending.
  - g) Total : Refers to total of amount figures.
3. Other Considerations
  - Format Size : Full Scap
  - Storage Form : File.

INLAND (REPLACEMENT) PENDING ORDERS REPORT FOR THE MONTH \_\_\_\_ YEAR \_\_\_\_

(AMT IN RS , 000)

S NO	AGENT	ORDERS PENDING TILL PREVIOUS MONTH	ORDERS RECEIVED DURING THIS MONTH	ORDERS PENDING AT THE END OF THIS MONTH	REASONS
	<u>TOTAL</u>				

Form Code	Title	No. of Copies	Frequency
IM-3	Inland (Mkt. Segmentwise) Pending Orders Report	2	Monthly
Initiator	To be sent by	Distribution	
Section Incharge (O.A.S.) or made on computer	1st week of every new month	MD/CE	

1. Purpose : To know pending orders position.
2. Form Description : Similar to Form Code No. with a difference that amount figures will be market segmentwise instead of Agentwise.
3. Other Considerations
  - Format Size : Full Scap.
  - Storage Form : File

INLAND (MKT. SEGMENT-WISE) PENDING ORDERS REPORT FOR THE MONTH \_\_\_\_\_ YEAR \_\_\_\_\_

(AMT IN RS, 000)

S. NO.	MKT. SEGMENT	ORDER PENDING TILL PREVIOUS MONTH	ORDER RECEIVED DURING THIS MONTH	ORDER PENDING THE END OF THIS MONTH	REASONS
	<u>TOTAL</u>				

Form Code	Title	No. of Copies	Frequency
IM-4	Monthly Sales Report (Productwise)	3	Monthly
Initiator	To be sent by	Distribution	
Section Incharge (D.A.S.) or made on computer	1st 10 days of every new month	SM/MD/CE	

1. Purpose : To know and plan monthly productwise sale.
2. Form Description
  - a) Serial Number : Numeric Serial number in ascending order.
  - b) Product's Name : Refers to product categories.
  - c) Current Actual Sale (Qty. & Amt.) : Product categorywise actual sales in quantity and amount of current month.
  - d) Current Planned Sale (Qty. & Amt.) : Product categorywise planned sales in quantity and amount of current month.
  - e) Cumulative Actual Sale (Qty. & Amt.) : Product categorywise actual sales in quantity and amount from financial year to current month.
  - f) Cumulative Planned Sale (Qty. & Amt.) : Product categorywise planned sales in qty. & Amt. from financial year to current month.
  - g) Total : Refers to total of amount columns only.
3. Other Considerations
  - Format Size : Full Scap.
  - Storage Form : File



Form Code	Title	No. of Copies	Frequency
IM-5	Monthly Sales Report (Agentwise)	3	Monthly
Initiator	To be sent by	Distribution	
Asst. Sales Manager or made on computer	1st 10 days of every new month	SM/MD/CE	

1. Purpose : To review Agents, ASM's, performance & plan for future strategies.

2. Form Description

a) Agent's Name : Refers to the name of the Company's Sales Agents.

b) Product's Sale (Qty. & Amt.) : Product category wise actual sales given both in (Qty. & Amt.) for all Agents against their targets.

c) Total : Refers to total of all columns.

3. Other Considerations

Format Size : Full Scap.

Storage Form : File.

MONTHLY SALES REPORT (AGENT WISE) FOR THE MONTH OF - - - YEAR - - -

AGENT'S NAME	PROD. A		B		C	D	E	F	TOTAL AMT
	QTY	AMT.	QTY	AMT					
1. .... (TRG) (ACT)					"	"	"	"	
2. .... (TRG) (ACT)					"	"	"	"	

Form Code	Title	No. of Copies	Frequency
<b>IQ-1</b>	Consolidated Report (Misc. Information)	2	Quarterly
Initiator	To be Sent by	Distribution	
Sales Manager	1st week of every new quarter	MD/CE	

1. Purpose : To review sales section performance.
2. Form Description
  - a) Serial Number : Numeric Serial Number in ascending order.
  - b) Description of Information : Refers to various heads like outstanding amount, pending orders, etc.
  - c) Current Quarter (Amt) : Refers to the amount of each individual head of the quarter.
  - d) Current Quarter (% of sales) :  $100 \times \frac{\text{Individual Head's Amount}}{\text{Total Sales of the Quarter}}$
  - e) Previous Quarter(Amt) : Refers to the amount of each individual head of the previous quarter.
  - f) Previous Quarter (%of sales) :  $100 \times \frac{\text{Individual Head's Amt. of previous quarter}}{\text{Total Sales of previous quarter}}$
3. Other Considerations
  - Format Size : Full Scap
  - Storage Form : File.

CONSOLIDATED REPORT MISC. - INFORMATION

S.NO.	DESCRIPTION OF INFORMATION	VALUE IN THIS QUARTER		VALUE IN PREVIOUS QUARTER	
		AMT.	% OF SALES	AMT	% OF SALES
1.	OUTSTANDING				
2	GOODS RETURN-DEFECTIVE -WRONG DISP. - OTHERS				
3.	PENDING ORDER				
4	RESUBMITTED CASES				
5	REBOOKED CASES				
6	NO. OF COMPLAINTS				
7	NO. OF NEW CUSTOMERS				
8	OTHERS				

Form Code	Title	No. of Copies	Frequency
<b>IQ-2</b>	Customer's Complaint Report	3	Quarterly
Initiator	To be sent by	Distribution	
Asst. Sales Manager	1st week of every new quarter	SM/MD	

1. Purpose : For analysing customer's complaints and to take corrective action.
  
2. Form Description
  - a) Serial Number : Numeric Serial number in ascending order.
  - b) Types of Complaints : Refers to complaint category.
  - c) No. of Complaints : The number of times the same complaint is being reported in a quarter by the customer.
  
3. Other Considerations
  - Format Size : Full Scap.
  - Storage Form : File.

CUSTOMER'S COMPLAINTS REPORT FOR THE QUARTER OF - - -

S NO.	TYPE OF COMPLAINTS	NO. OF COMPLAINTS
1.	SHORTAGE	
2	DEFECTIVE	
3	WRONG ITEMS	
4	LATE DELIVERIES	
5.	PENDING	
6	WRONG INVOICING	
7	WRONG MODE OF DESPATCH	
8	NON RECEIPT OF DOCUMENTS	

COMPLAINTS REGISTER TO BE MAINTAINED

DATE	PARTY NAME	TYPE OF COMPLAINT	ACTION	DATE	FINAL ACTION	DATE OF FINALISATION

Form Code	Title	No. of Copies	Frequency
IY-1	Sales Trend Report (Productwise)	3	Yearly
Initiator	To be sent by	Distribution	
Section Incharge (O.A.S.) or made on computer	1st week of every new year	MD/CE/SM	

1. Purpose : To know product wise sales growth for future planning.
2. Form Description : It is similar to Form Code . In this company's total product wise sales figures are given instead for only export.
3. Other Considerations
  - Format Size : Full Scap.
  - Storage Form : File



Form Code	Title	No. of Copies	Frequency
IY-2	Sales Trend Report (Agentwise)	3	Yearly
Initiator	To be sent by	Distribution	
Asst. Sales Manager or Made on Computer	1st week of every new year	MD/CE/SM	

1. Purpose : To know Agentwise Sales for Agents performance appraisals and setting targets in future.
  
2. Form Description
  - a) Serial Number : Numeric Serial number giving the total number of Agents.
  - b) Agent's Name : Refers to the name of the Agent through whom goods are sold.

: Other columns are similar to Form Code No. with a difference that amounts are given for each Agent's sale.
  
3. Other Considerations

Format size : Full Scap.

Storage Form : File.



Form Code	Title	No. of Copies	Frequency
IY-3	Yearly Sales Report (Agentwise)	3	Yearly
Initiator	To be sent by	Distribution	
Asst. Sales Manager or Made on Computer	1st week of every new year	MD/CE/SM	

1. Purpose : To review Agents'/ASM's performance and plan for future strategies.
  
2. Form Description : Report is similar to Form Code No. with a difference that values in this report refers to Agent's total yearly sales instead of monthly.
  
3. Other considerations
  - Format Size : Full Scap.
  - Storage Form : File.

SALES REPORT (AGENTWISE) FOR THE YEAR

AGENT'S NAME	PROD. A		B		C		D		E		F		TOTAL AMT.
	QTY	AMT.	QTY	AMT.	QTY	AMT.	QTY	AMT.	QTY	AMT.	QTY	AMT.	
1. --- (TRG) (ACT)													
2. --- (TRG) (ACT)													



EXPLANATION OF JOB DESCRIPTION PROFORMA

1. JOB TITLE : Refers to the designation of the person.
2. NO. OF POSTS : Refers to the no. of persons of this job title.
3. REPORTS TO : Refers to the designation of the immediate boss of the person.
4. PERSONNEL UNDER DIRECT SUPERVISION : Refers to the no. of persons working under him.
5. DUTIES AND RESPONSIBILITIES : Refers to the various activities to be cashed out by the incumbent.

- A. Activities presently carried out to be continued.
- B. Activities added now for the operation of MIS.
- C. Activities which have become redundant & thus, to be deleted.

1. Job Title : Sales Manager

2. No: of Posts : Present Proposed  
1 1

3. Report to : Managing Director/Chief Executive

4. Personnel Under Direct Supervision

Details	Present	Proposed
A.S.M.	4	4
Section Inch.	3	2
Typist	1	1
Steno	1	1

5. Duties & Responsibilities :

- A. 1. Overall supervision of Sales Deptt.
- 2. Negotiation with Customers & Agents.
- 3. General correspondence of the Sales Deptt.

- B. 1. Preparation of Reports No:

1. Job Title : Clerk (Production).
2. No: of Posts : Present Proposed  
1 1
3. Reports to : Section Incharge (Realization)
4. Personnel Under Direct Supervision : NIL
5. Duties & Resonsibilities :

A.

--

B. To be done on computer.

- C.1. Itemwise sales record in sales register.
2. Itemwise production record in production register.
3. Entry of Agents Realization in Realization Register.



1. Job Title : Record Keeper
2. No: of Posts : Present Proposed  
1 1 (may be assigned  
as part time).
3. Reports to : A.S.M. (Defence)
4. Personnel Under  
Direct Supervision : NIL
5. Duties & Responsi-  
bilities :

- A. 1. Maintenance of Complaints records.  
2. Maintenance of payments received Register.

B. --

- C. 1. Maintenance of outstanding payment records.  
2. Maintenance of Bill wise Register.

(To be maintained by Computer Deptt.)









1. Job Title : Section Incharge (Realization)

2. No: pf Posts : Present Proposed  
1 1

3. Reports to : Sales Manager

4. Personnel under direct supervision :

Details	Present	Proposed
Clerk (Records)	2	1
Clerk (Bank work)	2	2
Clerk (Prod. record)	1	-
Clerk (Tax Return)	1	1
Clerk (Bank Dak)	1	1

5. Duties & Responsibilities :

- A. 1. Supervision of subordinates.  
2. Entries in Bank Details Register.  
3. Entries of Payment Realization.

B. --

- C. 1. Prepare Sales & Collection Register.

1. Job Title : Clerk (Order Receipt Section)

2. No: of Posts : Present Proposed  
1 1

3. Reports to : Sales Manager

4. Personnel under direct supervision : NIL

5. Duties & Responsibilities :

- A. 1. Endorse file no. & order receipt no: on order.  
2. Forwarding orders to other sections.  
3. Acknowledge orders to customer.  
4. Send certificate of authorized dealership.  
5. Maintain record of issue of stationery to Agent.  
6. Entry of order in customer file.  
7. Giving information to customers & agents.

B. 1. Preparation of Report No:

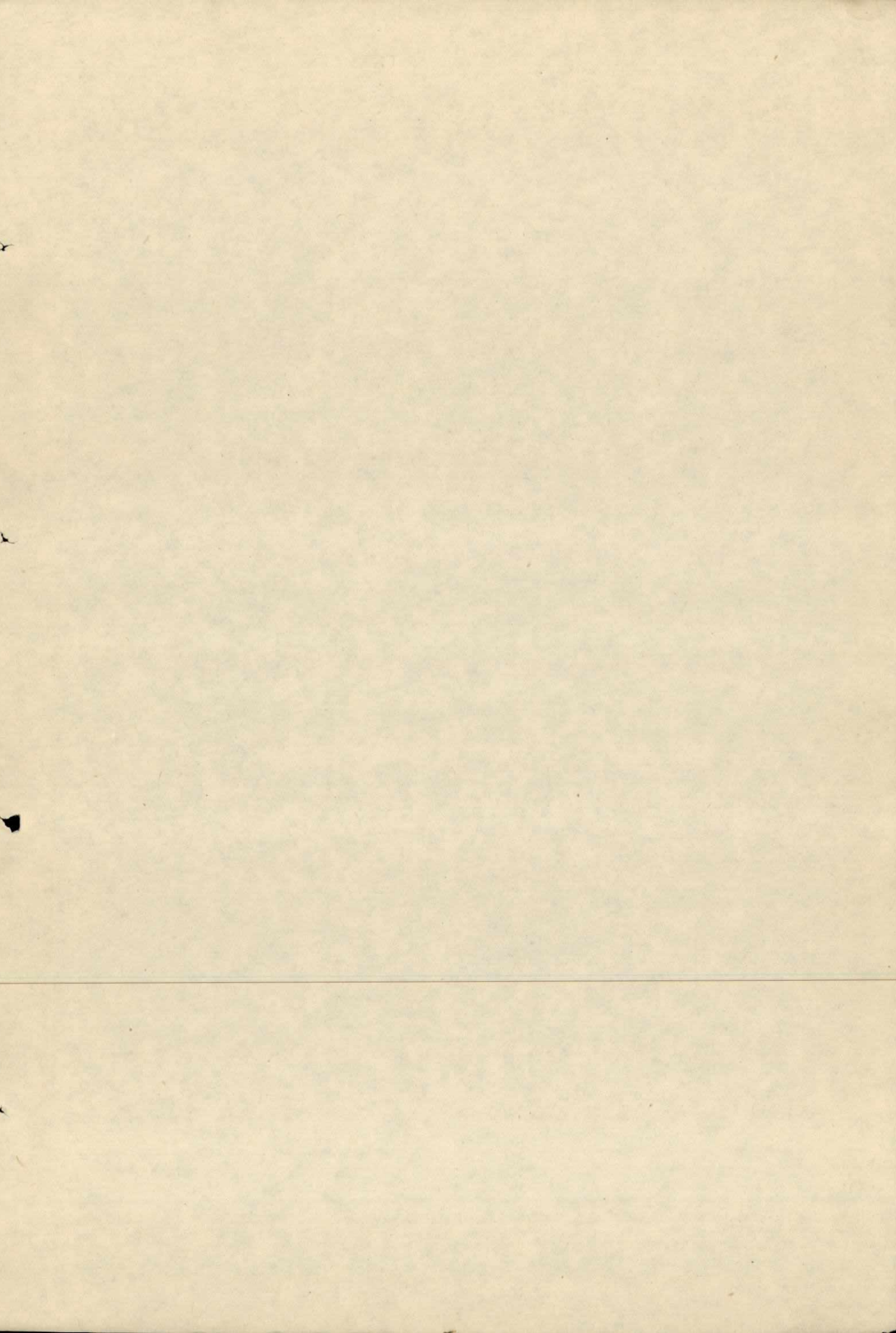
- C. 1. Entry of order in Agent Registers.  
2. Entry of billed amount and realizes amount in Agent's Registers.

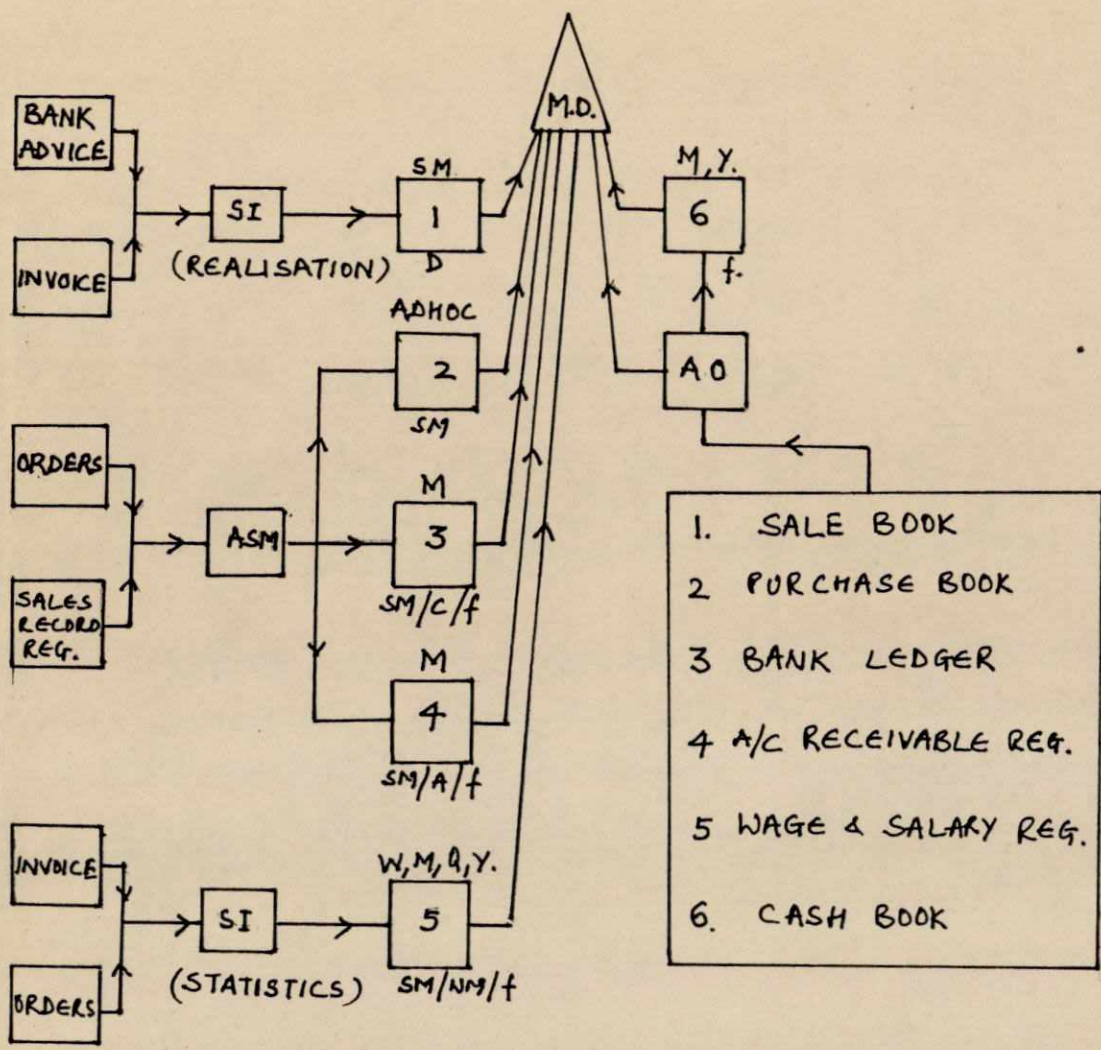
1. Job Title : Clerk (Transport
2. No: of Posts : Present Proposed  
1 1
3. Reports to : Sales Manager
4. Personnel under direct supervision : NIL
5. Duties & Responsibilities :

- A. 1. Order particulars entry in Billing Register and Excise Register.
2. Sending bills to transport agency.
3. Dealing with transport correspondence.
4. Road permit entries.
5. Entries in goods declaration form.
6. Maintaining Despatch Register.

B. --

C. --

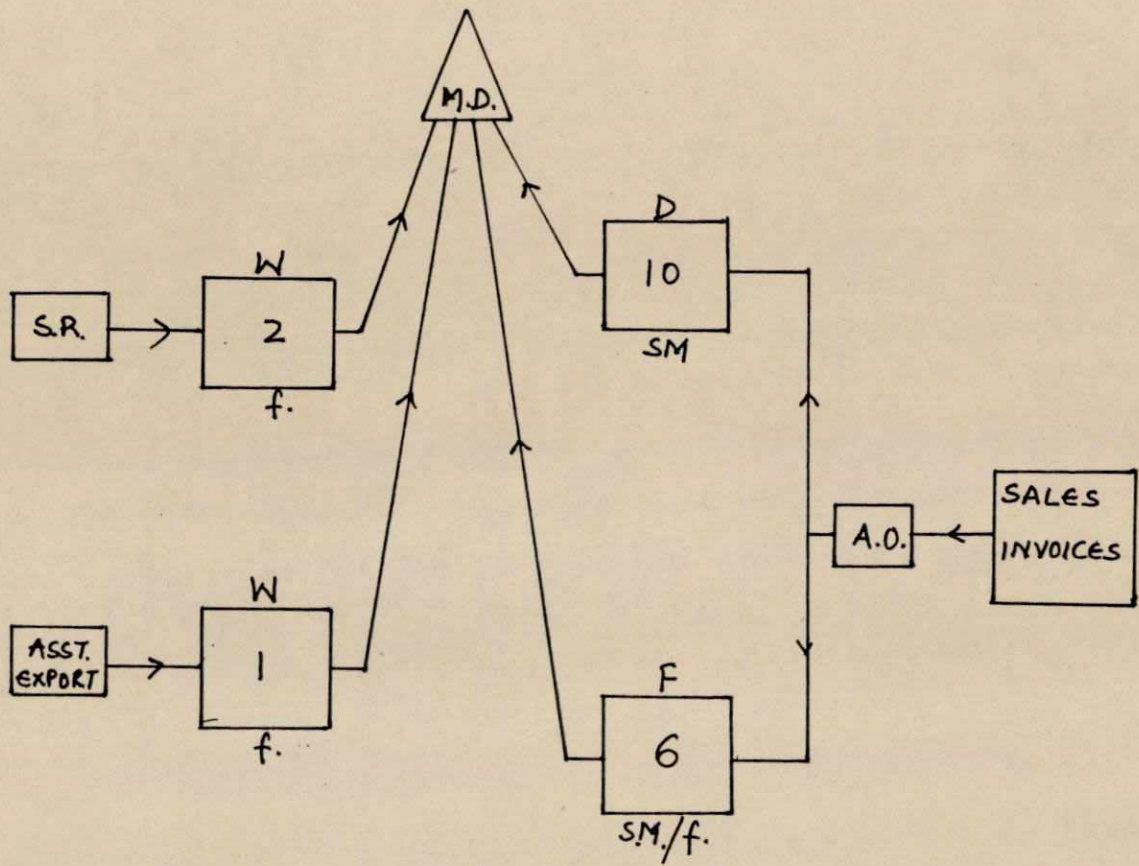




EXISTING INFORMATION SYSTEM

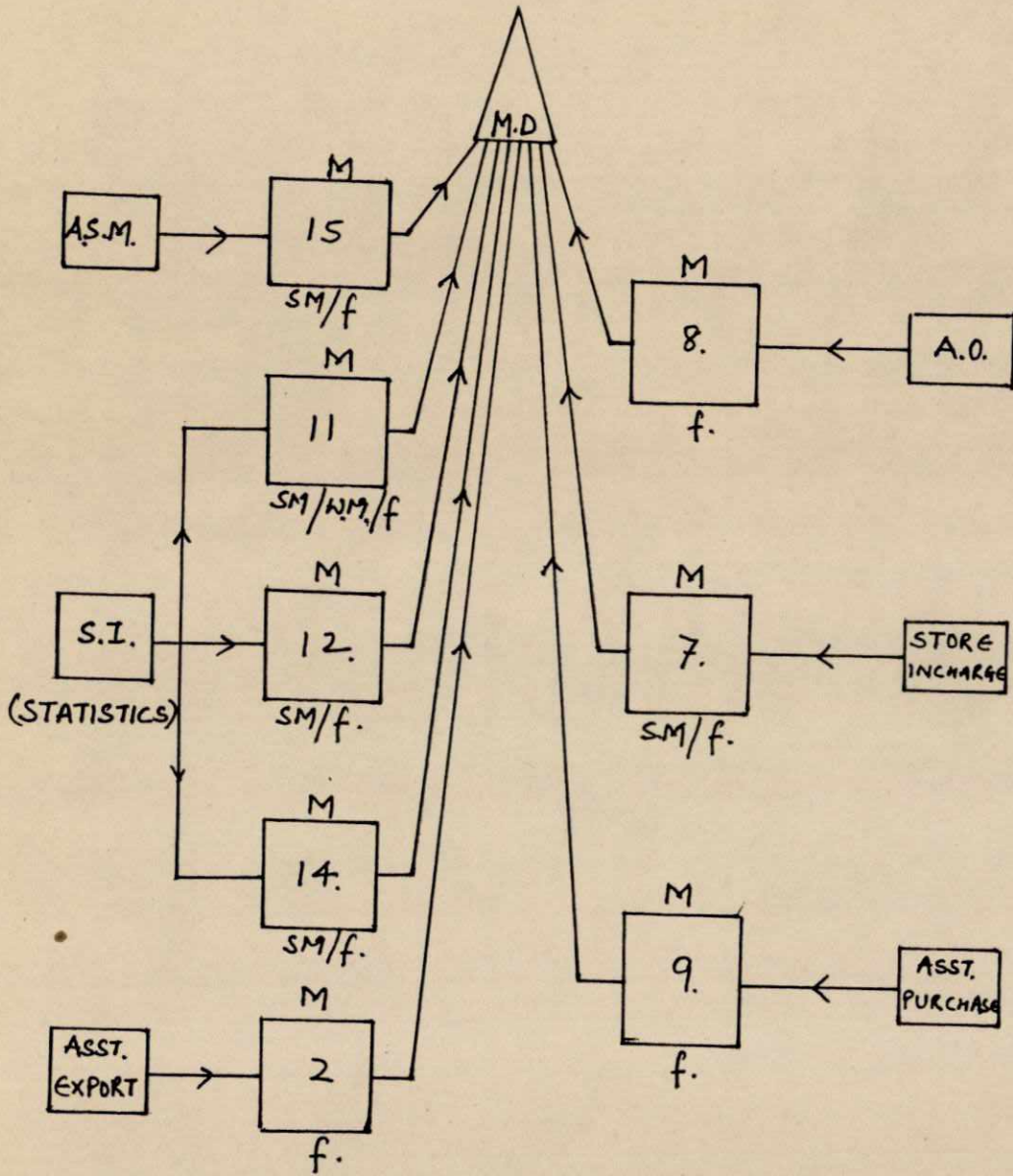
SYMBOLS

- |                       |                           |
|-----------------------|---------------------------|
| D: DAILY              | W: WEEKLY                 |
| F: FORTNIGHTLY        | M: MONTHLY                |
| Q: QUARTERLY          | ½Y: HALF YEARLY           |
| Y: YEARLY             | SM: SALES MGR.            |
| WM: WORKS MGR.        | S.I: SECTION INCHARGE     |
| ASM: ASST. SALES MGR. | M.D.: MANAGING DIR.       |
| f: FILE               | C: CUSTOMER               |
| A: AGENT              | S.R: SALES REPRESENTATIVE |

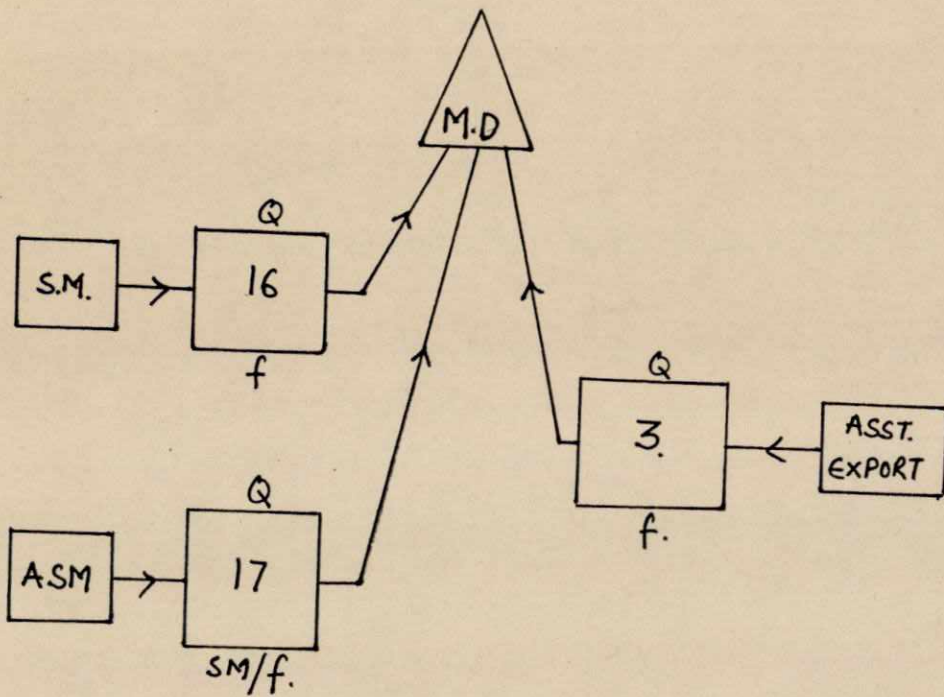


PROPOSED INFORMATION NETWORK

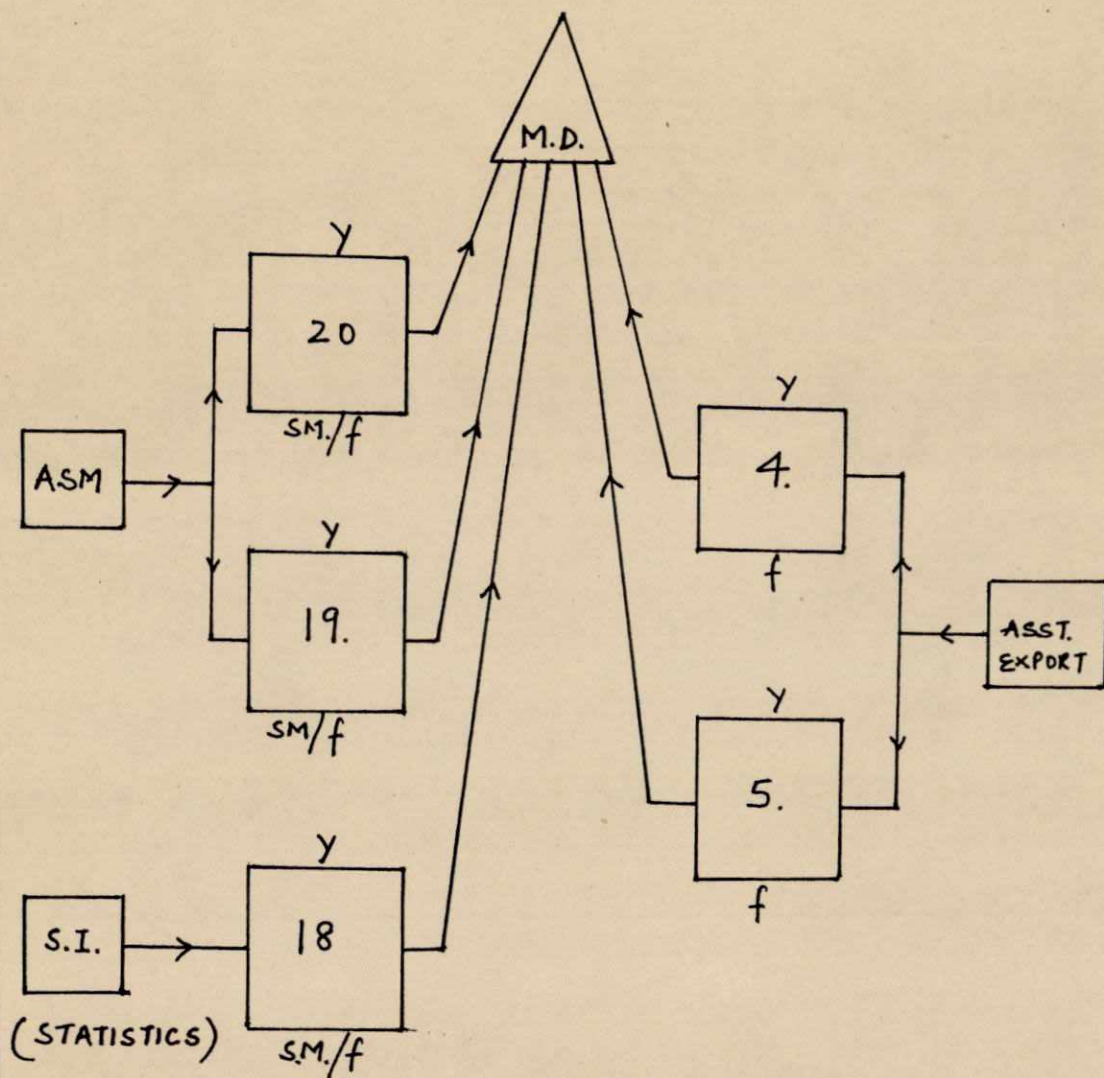
DAILY , WEEKLY & FORTNIGHTLY REPORTS



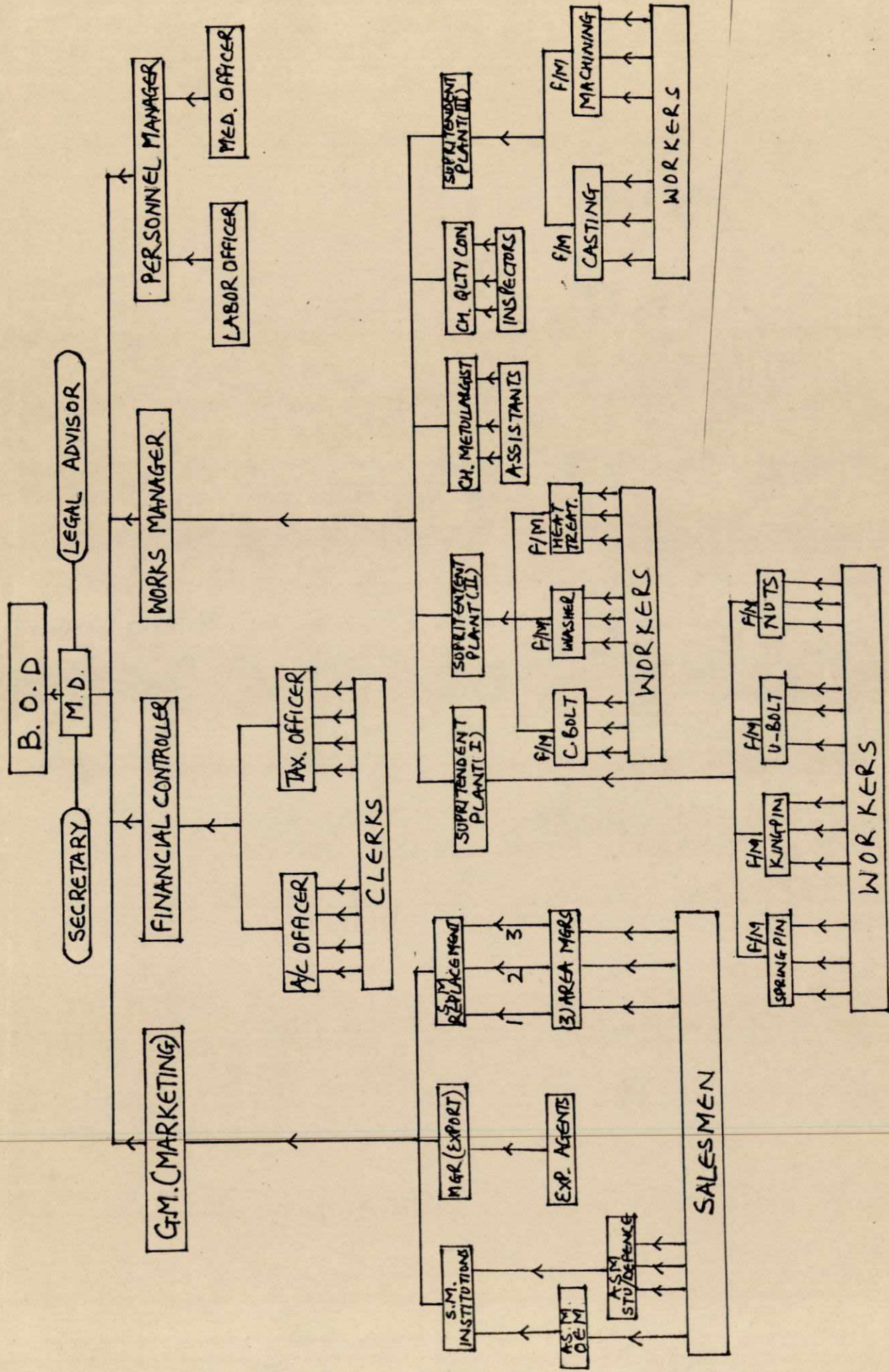
MONTHLY REPORTS



QUARTERLY REPORTS



YEARLY REPORTS



PROPOSED STATUS OF REGISTERS/FILES USED

S.No.	DESCRIPTION	Qty/No.	DEPTT.	PURPOSE	TO BE CONTINUED OR NOT	REASON OF DISCONTINUATION
1.	INDEX BOOK	2	ORDER RECEIVING SEC.	TO GIVE FILE NO. TO ORDER AND VERIFICATION.	YES	—
2.	ORDER RECEIVING REGISTER.	14	-do-	FOR ORDER ENTRY	NO	TO BE STORED IN COMPUTER SYSTEM.
3.	SALES RECORDING REGISTER.	3	ORDER ANALYSIS SEC.	ORDER RECORDING	NO	-do-
4.	INSURANCE DECLARATION REGISTER.	1	-do-	INSURANCE DECLARATION.	YES	—
5.	BANK DETAILS REGISTER.	4	REALIZATION SECTION	FOR BANK ACCOUNTS.	YES	—
6.	SALES AND COLLECTION REGISTER.	1	-do-	REPORTING SALES.	YES	—
7.	CHEQUE/DRAFT REGISTER	1	-do-	RECORDING	YES	—
8.	RESUBMITTED CASES REGISTER	1	SALES DEPTT.	MAKING REPORT	YES	—
9.	REBOOKED CASES REGISTER	1	-do-	-do-	YES	—
10.	COMPLAINT REGISTER	1	BILLING SECTION	REPORTING COMPLAINTS	YES	—
11.	CREDIT NOTE REGISTER	1	-do-	CREDIT RECORDING	NO	TO BE STORED IN COMPUTER SYSTEM.
12.	HUNDI REGISTER	4	-do-	SALES AMT. ENTRY	NO	-do-
13.	CUSTOMER FILES	5240	RECORD KEEPING	DOCUMENTING CUSTOMER DOCUMENTS	YES	—
14.	REALIZATION PENDING FILES	11.	REALIZATION	KEEPING IMPORT CASES	YES	—

SUMMARY OF THE PROPOSED MANPOWER DEVELOPMENT

S. NO	DESIGNATION	NO. OF POSTS	
		PRESENT	PROPOSED
1.	SALES MANAGER	1	1
2	ASST. SALES MANAGER	4	4
3	SECTION INCHARGE (STATEWISE)	1	NIL
4	SECTION INCHARGE (BILLING)	1	1
5	SECTION INCHARGE (REALISATION)	1	1
6	ASST. EXPORT	1	1
7	PURCHASE ASSISTANT	1	1
8	FINANCIAL CONTROLLER	1	1
9	ACCOUNTS OFFICER	2	2
10	CLERK	33	26
11	TYPIST	15	10
	TOTAL	61	48

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