

Participant Handbook

Sector

MEDIA AND ENTERTAINMENT

Sub-Sector

**Television, Print, Radio,
Digital, Out-of-home**

Occupation

**Ad Sales / Account
Management/
Scheduling/ Traffic**

Reference ID

**MES/ Q 0204, Version 1.0
NSQF Level 4**



Sales Coordinator

This book is sponsored by Media and Entertainment

Sector Skill Council Contact Details:

Address: 522-524, 5th Floor, DLF Tower-A, Jasola District Centre, New Delhi – 110025

Email: info@mescindia.org

Phone: +91 11 49048335 | 49048336

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Shri Narendra Modi
Prime Minister of India

“

Skilling is building a better India.
If we have to move India towards
development then Skill Development
should be our mission.

”



Certificate

COMPLIANCE TO QUALIFICATION PACK – NATIONAL OCCUPATIONAL STANDARDS

is hereby issued by the

MEDIA AND ENTERTAINMENT SKILLS COUNCIL

for the

SKILLING CONTENT: PARTICIPANT HANDBOOK

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The development of this manual would not have been desirable without the support of Media and Entertainment Industry. Industry feedback has been extremely encouraging from inception to conclusion and it is with their input that we have tried to bridge the skill gaps existing today in the Industry.

This participant manual is dedicated to the aspiring youth who desire to achieve special skills which will be a lifelong asset for their future endeavors.

About this Book

This Participant Handbook is designed to enable training for the Sales Coordinator Qualification Pack (QP) with Ref. ID MES/ Q 0204. There are 4 National Occupational Standards (NOS) under this qualification pack. Each National Occupational (NOS) is covered across 7 Units in this book.

Key Learning Objectives for every NOS mark the beginning of the Unit for that NOS. In Table of Contents, you will find the module names with their corresponding NOS code. The symbols used in this book are described below.

Symbols Used



Key Learning
Outcomes



Steps



Time



Tips



Notes



Unit
Objectives



Exercise

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1. Introduction

Unit 1.1 - Introduction to the Media and Entertainment

Unit 1.2 –Duties and Responsibilities of a Sales
Coordinator



Key Learning Outcomes



At the end of this module, you will be able to:

1. Explain the key features of the Media and Entertainment sector.
2. Discuss various processes and products of Media & Entertainment sector.
3. Learn about the role of Sales Coordinator in industry.
4. Identify the minimum requirement to become a certified Sales Coordinator.
5. Explain the work field of Sales Coordinator.
6. Identify the opportunities available for Sales Coordinator.

UNIT 1.1: Introduction to Media & Entertainment

Unit Objectives

At the end of this unit, you will be able to:

1. Describe the media and entertainment industry in India
2. Describe the growth expected in the media & entertainment industry
3. Explain the various products and processes of the industry
4. Identify some keywords used in the industry

1.1.1 Media and Entertainment Sector in India

The Indian media and entertainment (M&E) sector is one of the biggest in the world. It is placed as 14th largest in the world. This sector is 1.7% of Indian GDP and expected to be 2.2% of GDP with INR 4.5 lakh crores in 2022. The sector employs 9.3% of the workforce of our country and we are expecting it to be 17% till the end of 2017

From 2014 to 2018 Media and Entertainment sector has grown by approximately 11 percent CAGR which makes Media and Entertainment sector INR 1.43 trillion industry. It is estimated that Indian Media and Entertainment market will flourish to CAGR of 13.1% in FY 18-23 reaching at INR 2.66 trillion. The industrial performance of M&E sector is given in next figure.

Overall industry size (INR billion)	FY14	FY15	FY16	FY17	FY18	Growth in FY18 over FY17
TV	433.7	489.9	551.7	595.3	651.9	9.5%
Print	248.2	268.4	288.4	308.4	318.9	3.4%
Films	126.4	126.9	137.1	145.0	158.9	9.6%
Digital advertising	32.5	47.0	64.9	86.2	116.3	35.0%
Animation and VFX	41.0	46.5	53.2	62.3	73.9	18.6%
Gaming	20.3	24.3	27.6	32.4	43.8	35.1%
OOH	19.9	22.3	25.5	28.6	32.0	11.9%
Radio	17.2	19.8	22.7	24.0	25.9	7.9%
Music	8.5	10.2	11.2	12.6	14.4	14.7%
Total	947.6	1,066.1	1,182.3	1,294.7	1,436.0	10.9%

Source: KPMG in India analysis, 2018 based on primary and secondary research

Figure 1.1. 1 Revenue of M&E Industry

In 2018, digital advertising business grew 35% as compared to 2017. Another high growth sub-sector is Gaming which grew by 35.1% in FY 2018 as compared to FY 2017. The projected growth of industry for FY 2018 to 2023 is given in next figure.

Overall industry size (INR billion)	FY19	FY20	FY21	FY22	FY23	FY18-23 CAGR%
TV	746.4	855.3	959.1	1,066.6	1,179.6	12.6%
Print	338.5	357.8	378.6	400.8	424.9	5.9%
Films	171.7	185.4	199.3	213.9	228.8	7.6%
Digital advertising	154.7	202.6	263.4	339.8	435.0	30.2%
Animation and VFX	86.7	100.9	116.8	133.5	151.8	15.5%
Gaming	55.4	70.9	84.7	103.3	118.8	22.1%
OOH	35.7	38.6	42.0	45.7	49.7	9.2%
Radio	28.3	31.8	34.8	38.8	42.1	10.2%
Music	16.6	19.1	22.1	25.6	29.6	15.5%
Total	1,633.9	1,862.5	2,100.7	2,368.0	2,660.2	13.1%

Figure 1.1. 2 Projected growth of M&E Sector

India is one of the largest broadcasters in the world with approximately 800 TV channels, 242 FM channels and more than 100 community radio networks working at present. Bollywood, the Indian film industry is the largest producer of films around the globe with 400 production and corporate houses involved.

The Government of India keeps on pushing the Media and Entertainment industry by launching various schemes such as digitizing the cable TV to fill greater institutional funding, raising the Foreign investment from 74 per cent to 100 per cent in cable and DTH satellite platforms.

Government has also allotted industry status to the film industry for easy finance.

1.1.2 Employability in Media and Entertainment Sector

The Media & Entertainment sector employs 11-12 lakh people directly (as per 2017 reports) and if we consider indirect employments as well then count goes to 35-40 lakh people. The Media sector is highly dependent on advertising revenues and performance of Industry for economy outlook. This sector was having 4 lakhs workforce in 2013 and we expect it to reach 13 lakhs by 2022 which means employing 9 lakhs of additional employment in the period of 2013-22.

- 1/4th of the people employed in Media and Entertainment sector are from film industry.
- The Media & Entertainment sector has about 4.60 lakhs people employed, and is projected to grow at the rate of 13 % to reach 7.5 lakhs by 2017.
- The Media and Entertainment sector which is expected to grow at rate of 13.1 % by 2023 which means to reach 2.7 lakh crore of business for skilled professionals.
- Film & Television sector has a major portion of the workforce employed in media and entertainment. Digitization activities being done in both films and television arena are the key player for this demand.

Workforce in the sector

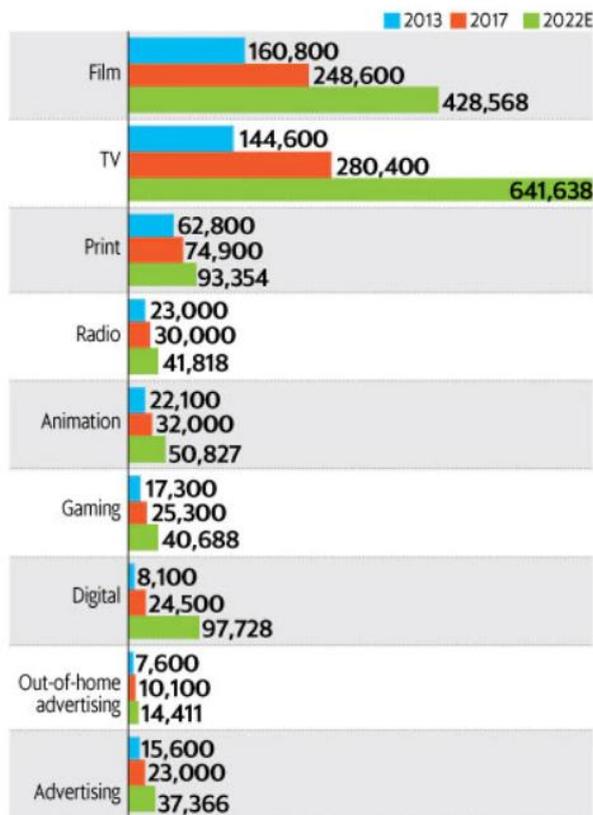


Figure 1.1. 3 Employments in Different Sectors of Media and Entertainment

1.1.3 Evolution of Media and Entertainment Sector

- Radio broadcasting came by Radio Club of Bombay in 1923 in India under the British rule.
- All India Radio (AIR), one of the largest radio networks in the world, started working in 1936.
- Doordarshan (DD) started the era of TV on Sept 15, 1959 in India.
- The Indian economy was closed until 1990, and no private player was allowed to enter the space. In the 1990s, the Indian film industry was completely fragmented.
- BBC launched its national service in 1995.
- In 1999, the government allowed private Indian Firms to set up their FM stations on a license fee basis.
- In May 2000, as part of Phase I of radio broadcast licensing, the auction was conducted and 37 licenses were issued, out of which 21 are operational in 14 cities.
- Approximately 1000 TV channels and 1052 radio stations are expected to be working by 2022.

1.1.4 Major Subsector and Segments

- The Indian M&E industry comprises several sub-sectors, such as television, radio, print media (including newspapers and magazines), films, animation and visual effects (VFX), Sound & Music, Amusement & Theme Parks, Art & Culture, and Event Management/Live Performances.
- Advertising industry is the major revenues generating part of the industry and the growth of the sector decides the overall growth of the industry.
- Although there is not much to export from this industry but imports have a considerable share in the economy like imports of newsprints, set-top boxes and antennae.

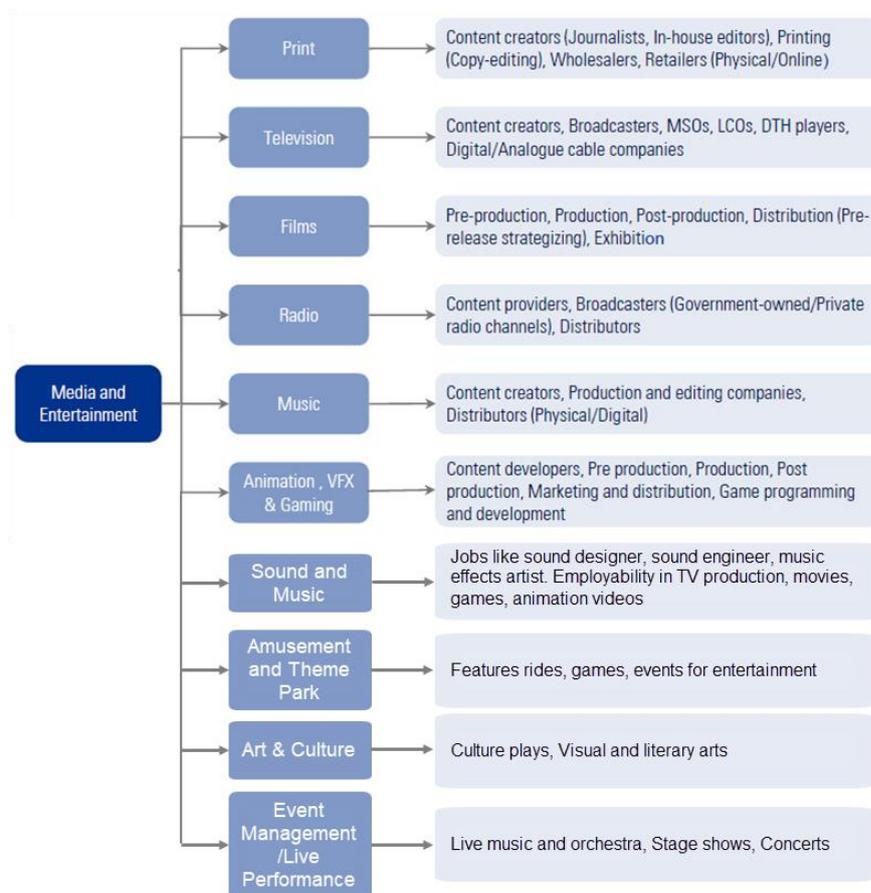


Figure 1.1. 4 Media and Entertainment Sector

- The industry is specific to cultural and ethnic backgrounds, and is organized around specific hubs that specialize in output for a given population segment. For example, the Mumbai film industry (Bollywood) is a key film hub in the country. A similar hub also exists in South India.

Growth rate by sub-sector

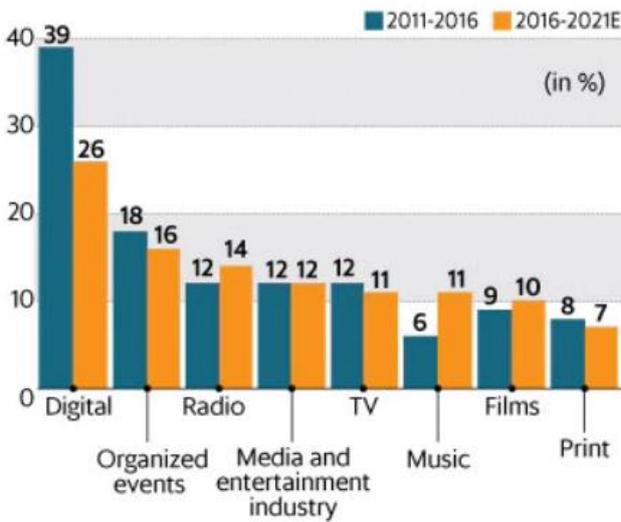


Figure 1.1. 5 Media and Entertainment Sector Growth Rates expected in 2016-2021

1.1.5 General Key Words used in this Book

Animatic: A series of images edited together with dialogues and sound is called animatic.

Compositing: Combining layers of images/elements into a single frame is called compositing.

Composition: Positioning character with respect to the background and camera is called composition.

Creative Brief: A document that captures the key questions for the production including the vision, objective of the target audience, budgets, project, milestones, timelines and stakeholders is called creative brief.

Key Frame: Key poses that start and end poses for a particular animation sequence are called key frames.

Modeling: Creation of three-dimensional models for animation using a specialized software is called modelling.

Rendering: Conversion of three-dimensional models into two-dimensional images with 3D effects is called rendering.

Rigging: Process of adding joints to a static three-dimensional model to aid movement during posing is called rigging.

2D animation: Moving pictures in a two-dimensional environment is called 2D animation like in computerized animation software.

3D animation: 2D animation with depth is called 3D animation. Examples include video games such as Halo and Madden Football.

Animation: Sequential play of various inter-related frames is called animation.

Anticipation: Anticipation are created through the preparation of an action.

Aspect Ratio: The width to height ratio of a tv picture is called aspect ratio.

Background Painting: An artwork done in the background of an animation is called background painting.

CGI (Computer Generated Imagery): Creation of Figures, settings, or other material in the frame using computer software is called CGI.

Clean-Up: The process of refining the rough artwork of 2D animation is called Clean-up.

Computer Animation: Any kind of animation created in computer is called computer animation.

Frame: one of a series of still transparent photographs on a strip of film used in making movies or animations.

Frame Rate: The rate of change of frames in an animation is called frame rate. It is measured in frames per second (fps).

Graphics Tablet: This is a device used to draw sketches.

Pixel: The smallest undivisible portion of an image is called pixel.

Raster: Rastering is the projections of various pixels on CRT screen to form an image.

Rotoscoping: Creation and manipulation of background images of an animation is called rotoscoping. This can be done manually as well as using computer software.

Title Cards: Title cards are also called FIR of an animation. Title cards give brief information about the animation.

Tween: The transition of one frame to another in animation is called tween.

Vector: Some of the artwork is created by vectors rather than pixels. This allows cleaner and smoother animation because images are displayed by mathematical equation solutions.

CEL: It is a cellulose sheet used to paint characters. In practice, it is now a day. plastic sheet in combination with the outline and coloring of a character, object, and/or special effect.

Exercise-1



Discuss the role of Media & Entertainment sector in India economy.

Exercise-2



Discuss the employability of various sub-sectors in Media & Entertainment Sector.

UNIT 1.2: Duties and Responsibilities of Sales Coordinator

Unit Objectives

At the end of this unit, you will be able to:

1. Learn about the role of Sales Coordinator in Media and Entertainment industry.
2. Identify the minimum requirement to become a certified Sales Coordinator.
3. Explain the work field of Sales Coordinator.
4. Identify the opportunities available for Sales Coordinator.

1.2.1 Introduction to Sales Coordinator Job Function

A Sales Coordinator's Role responsible for giving assistance to the sales organization in achieving regular or periodical targets through presentation, contract progress and proficient communication with the recent and existing consumers, representatives, assistants and external distributors. A Sales Coordinator deals with all complicated inquiries from the consumer and establish consumer satisfaction. A Sales Coordinator regularly explore new sites, event plans and restaurants to provide support to the innovative process of casting program, concepts to consumers.

A Sales Coordinator should consist of following responsibilities:

- Communicate energetically with Sales Executives and their consumers to manage existing relationships while assisting to develop and establish new customer relationship.
- Maintaining sales and administrative assistance through miscellaneous office responsibility such as calling the dealers, giving reply to the phones, maintaining calendars, organizing site visit, etc.
- Giving assistance to the sales unit in achieving sales targets.
- Processing daily, weekly or monthly sales evaluation with the instructions given by the Sales Director.
- Mention recent sales inquiries into the firm's database and refresh project documents in the database as required.
- Collecting, resolving, calculating and accounting project reporting order to enhance sales production.
- Managing an effective work atmosphere while committing to the overall development of the company.
- Coordinating and replying to all queries of internal affairs.
- Coordinating in the utilization of sales project as prepared by the Sales Manager.
- Collect an information of venues, travelling, restaurants etc. to provide detailed estimate of particular requirements of a customer.

- Organize presentation and contracts that definitely reflects the services requested. These services consist of creative article writing, analysis, costing and word processing

Individuals at this profession are responsible for fundamental sales activities. This profession requires the individual to note the details of sales activities into the sales procedure or system software. Create statements and maintain collections in favor of the organization. The individuals also generate MIS reports for organization on the budget of stocks sold sales amount generated.

1.2.2 Job Profile of Sales Coordinator

Individuals at this profession are responsible for fundamental sales activities. This profession requires the individual to note the details of sales activities into the sales procedure/ software, create statements and maintain collections in favour of the organization. The individuals also generate MIS Report for organization on the budget of stocks sold and sales amount generated.

A Sales Coordinator performs following tasks in the industry:

- Understand contents (stocks, amount, consumer, etc.) from the sales contracts.
- Design the work schedule, if applicable.
- Increase statements and insert information into the sales program on account of stocks sold, develop and arrange sites/ stocks trackers as applicable.
- Produce analyze and generate service orders based on ROs taken from customers/agencies.
- Create and manage reports on buyers, opponents, missing customers etc. and forward these reports to consistent company for follow up.
- Understand the various category of reports proposed by the authority/other internal affairs.
- Arrange and submit data in the detailed format to satisfy the demands.
- Answer positively to comments and changes in requirements.
- Constantly analyze the report to describe trending key points and other differences.
- Create and manage reports on billings and collections.
- Give assistance to the sales team representatives in collections by arranging and dispatching reminders and report to customers and agencies.
- Understand and satisfy with the management's present safety, health and security guidelines and practices.
- Understand the government plans and guidelines pertaining to health and safety containing emergency operations for ailments, accidents, fires and others which can contain removal of the premises.
- Recognize and suggest opportunities for improving safety, security and health of the organization.

1.2.3 Opportunities for Sales Coordinator

Deliver Consumer services including sales support is an essential part of this job. Several times you have direct communication with your organization's customers and agents, either it is relating to a product or billing issues or an inquiry matter. You can also have to work with the sales unit and executives on the matters relating to sales and consumers. You have to manage customer details and database for the organization. You have to be ready to deliver products as required.

Departmental duties commonly include maintaining reports and other database relating to organization's sales and customer's other activities includes managing bidding reports or finishing services setups on that region.

Task of sales coordinators vary according to the requirement. They have to adapt themselves working in all types of environments. Depending on the industry and organization, Sales Coordinators may have to work in weekends and holidays also. Salaries of Sales Coordinator depends on the company and employer, the geographical area and knowledge of the Sales Coordinator. Some industries offer bonuses, commissions and profit share which ultimately adds in a basic salary.

According to the Indian Bureau of Labor Statistics which trace information and make predictions for private professionals, job growth of Sales Executives and Sales Managers is expected to be moderate through 2025. The job portals report that more than half of the population working as Sales Coordinator have been in their position for 3 years or less. This is just because of Sales Coordinator works are great plan for promotion to better paying post such as Regional and Marketing Sales Manager, Sales and Marketing Coordinator, Account Manager, etc.

1.2.4 Key Professional Skills

Being capable to multitask and being attentive will help Sales Coordinator do this job efficiently. Since, Sales Coordinator engaging with bills, accounts, product information and consumer database, they have to record such information correctly and in a proper method.

Although there is no academic education required for Sales Coordinator, many organizations search for candidates who have a professional degree in a business related field in addition to some sales experience. Computer Skills are also mandatory. Especially, proficiency in commonly used applications such as Microsoft Excel, Word and Access, etc. is required to perform in both sales and office duties. Sales Coordinators required outstanding communications and leadership skills and the capacity to adapt immediately to changing atmosphere is necessary too. Sales Coordinators require expertise in the organization in which they work, and an accurate knowledge of their industry's products and services.

Exercise



- What is the role of Sales Coordinator in an organization?

- What are the responsibilities of a Sales Coordinator?

- Discuss the opportunities for Sales Coordinator in Indian Market.

- Discuss the skills required to become a Sales Coordinator?



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N S D C
National
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Transforming the skill landscape



Media & Entertainment Skills Council

2. Managing Sales

Unit 2.1 – Media Products

Unit 2.2 – Sales Documentation and Processes

Unit 2.3 – Microsoft Excel for Sales Processing



MES/N 0210

Key Learning Outcomes



At the end of this module, you will be able to:

- Understand contents (stocks, amount, consumer, etc.) from the sales contracts.
- Design the work schedule, if applicable.
- Increase statements and insert information into the sales program on account of stocks sold, develop and arrange sites/ stocks trackers as applicable.
- Produce analyze and generate service orders based on ROs taken from customers/agencies.
- Create and manage reports on buyers, opponents, missing customers etc. and forward these reports to consistent company for follow up.

UNIT 2.1: Media Products

Unit Objectives

At the end of this unit, you will be able to:

- Understand contents (stocks, amount, consumer, etc.) from the sales contracts.
- Design the work schedule, if applicable.
- Increase statements and insert information into the sales program on account of stocks sold, develop and arrange sites/ stocks trackers as applicable.
- Produce analyze and generate service orders based on ROs taken from customers/agencies.
- Create and manage reports on buyers, opponents, missing customers etc. and forward these reports to consistent company for follow up.

2.1.1 Products sold in Animation and Media Industry

It is a very uncertain condition for a Film Producer or a person relating to media industry to make the list of necessary media products. Film Producer commonly explore with the camera first, which is a right way. Grab the gadget which shoots best quality of videos. After all, when you began to make short movies and wish your movies to have a graphic style, you need to specify a film making product list for the product shooting.

The list can be extensive or requirement based. Each filmmaker has his specific technique of storytelling. Therefore, advising a specific media product list will be useful for few filmmakers but of no benefit for others. It relies upon many variants like shooting place, production requirement, budget of the movie, time, area specific rules and regulations, etc. Filmmaking is a valuable profession and buying the products are not of low cost. You can obtain it as per your economic conditions and comfort.

On account of various requirements and skills, Sales Coordinators have to sell a standard and necessary media product for entertainment and media industry. Some of these products are listed below:

CAMERA:

A digital video camera is the main feature of the filmmaking equipment list. What camera one select depends on the cost, the nature of shooting (motionless, secret, etc.) and the place decided to present the film (cinemas, broadcast, etc.).



Figure 2.1 1 DSLR Camera

LENS:

A camera does not exist without a lens. It's the most dominant product that makes the images full of deepness and colors. Lenses are costly too, but at least you must spend in a prime and a zoom lens. Where broad lenses are suitable for designing scenes and managing systematic focus throughout, the long lenses includes more character to the screen and make the picture more photographic.



Figure 2.1 2 Camera Lenses

FILTERS:

Nowadays you can do some crunchy color modification at the time of post-production procedure. It is a well-known reality that post-production filtering decreases the image deepness more than the camera filters. Also, it is not an actual photographic view what a color modified video obtain. May not be all, but few lens filters are highly beneficial to develop remarkable imagery.



Figure 2.1 3 Filters

TRIPOD:

The basic requirement for the shooting is to have camera support that can swing and incline smoothly. What better than the tripod. For stable pans and carrier, tripod saves a lot of inconvenience. They are the extended equipment of the filmmakers, and with some practice on the various techniques it can execute, it will instantly replace the requirement for expensive and heavy jibs and cranes.



Figure 2.1 4 Tripod

MONOPOD:

Monopods is a magnificently adjustable camera equipment. It adds effectiveness to your cinematography by arranging some quick dynamic actions with it. Unlike Tripod, they have only one upright leg. They are less heavy than a tripod and are perfect as it replaces a lot of expensive cranes and tracks if you use them in a proper manner.



Figure 2.1 5 Monopod

GIMBALS:

Gimbals are transform the image equalization landscape. They are the latest equipment and have taken the world by storm. It is a much better option than a Static camera. The results are excellent. Gimbals work with its software, motors and sensors to deny the cinematographer's actions, resulting in a very stable camera hold in spite of some shaky turns and moves by the cameraman.



Figure 2.1 6 Gimbals

GORILLA POD:

Gorilla pods give excellent solutions to film production complications. These mini pods that appear like spiders can grasp anything with their flexible three arms. The arms fold around objects, and you can affix your camera or smartphone over them to capture new scenes.



Figure 2.1 7 Gorilla Pod

SUCTION MOUNT:

The most popular and convenient mount is the favorite suction mount. It can attach into cars or any flat surface, and you can capture some impressive and dynamic graphics through that. The most popular name of the brand is GoPro.



Figure 2.1 8 Suction Mount

SHOULDER RIG:

You must have a shoulder rig in your stock, if you are using DSLR for shooting. The stability it gives cannot be similar to a handheld. It is useful when you want an alternative for the bigger pods. It adjusts on the shoulder perfectly and becomes easy for following the objects.



Figure 2.1 9 Shoulder Rig

SLIDERS:

Sliders came into existence when the DSLRs became famous among the film producers. The light adds subtle actions in the camera to add some cinematography to the shots. The movements are very smooth and provide a professional appearance.



Figure 2.1 10 Slider

FOLLOW FOCUS:

Focus doesn't appear very tricky at the beginning when you shoot with tripods. But when you track an object on an irregular movement, do a handheld movement or shift between objects, focusing becomes a little pain particularly, when you are shooting with a hollow deepness of field.



Figure 2.1 11 Follow Focus

QUADCOPTERS (DRONES):

The quadcopters commonly known as drones have changed the outlook of aerial shooting. The Drones have presented as the best alternative to the expensive aircraft and jibs. They add more actions and command to the aerial aspect.



Figure 2.1 12 Drones

CAMERA BAG:

When you invest in purchasing expensive products, you need a briefcase to protect them from damages during transportation. Camera Bags or handbags carry many equipment other than the camera. It is a beneficial and convenient accessory to carry things around in one set.



Figure 2.1 13 Camera Bag

PORTABLE DIGITAL AUDIO RECORDER:

The sound plays fifty percent role in the film production. This is the potential of sound in cinema. In the black & white age when the movies were without sound, film producers realized that sound is an essential part of the medium. It is the most dynamic mechanism to catch the audience. They perform live orchestra to improve their storytelling. Then started recording audio and music tracks. Slowly dialogues were recording.



Figure 2.1 14 Digital Audio Recorder

MICROPHONES:

The cameras come with fixed microphones. But, it is hard to record through them as you can't get close to the objects or can't locate the microphones in the direction of the objects to focus on its sounds. The audio is full of surrounding noises, and there is no accuracy or quality of the sounds from each person. The only benefit of the camera microphone is the audio is synchronized correctly to the video. Also, you don't invite the technical problems which come from professional recording.



Figure 2.1 15 Microphones

HEADPHONES:

Headphones may appear to be an irrelevant gear but have an important role to play. While recording sounds, it is always compulsory to do the work using good quality headphones. When you record sounds, you may not be attentive of what your microphone is recording. They are sensitive gadgets. They pick some ordinary sounds sensibly clearly what your ears will short of identifying them.



Figure 2.1 16 Headphones

LIGHTS:

When it comes to lighting product, the beginners must not invest in purchasing them. Every shot has different needs. You will empty your pocket soon if you purchase lighting equipment. Renting lights are comparably cheap. The recent digital camera sensors are more sensitive to capture good pictures in low light situation.



Figure 2.1 17 Three-Point Lighting

LIGHT REFLECTORS:

Bouncing lights are beneficial to soft fill the objects so that they don't get high artificial contrasts on screens. They add more clarification and deepness to the visuals. There are many ways to bounce or reflect lights for increasing creative lighting. The low price light reflectors are convenient in doing these jobs.



Figure 2.1 18 Light Reflectors

STORAGE:

A low storage system can bring chaotic situation for a newbie filmmaker. But the new SSDs have upgraded with time. They are much faster. Mobility is the most important factor in selecting them. However, many suggest the hard drives for saving backups. The SSDs are small and are hence unsafe to getting lost. So, they required to make duplicate and maintained well. They are little costly than the hard drives but very convenient.



Figure 2.1 19 SD Cards for Storage

POWER SUPPLIES:

Studios commonly have their power setups, but when you are shooting on location which are out of your authority, it is recommended to have a backup plan. The lights and the production equipments use the most power. The camera and the recorders consume relatively low power than the needs of the lighting sources.



Figure 2.1 20 Batteries for Power Supply

MULTI TOOLS:

There is a variety of tools which are efficient in doing small complicated work and saves time and money. They are amazingly cheap, but they are precious when it does those incredible jobs for you. They includes clamps, Swiss knife, electrical tapes, etc.



Figure 2.1 21 Electrical Tapes

BOOM POLE:

A boom mic set-up becomes convenient to capture audio from an organization interview, crowd scenes or any condition where you want to collect professional audio instantly. In addition to the boom pole, you'll require a shock mount and a shotgun mic.

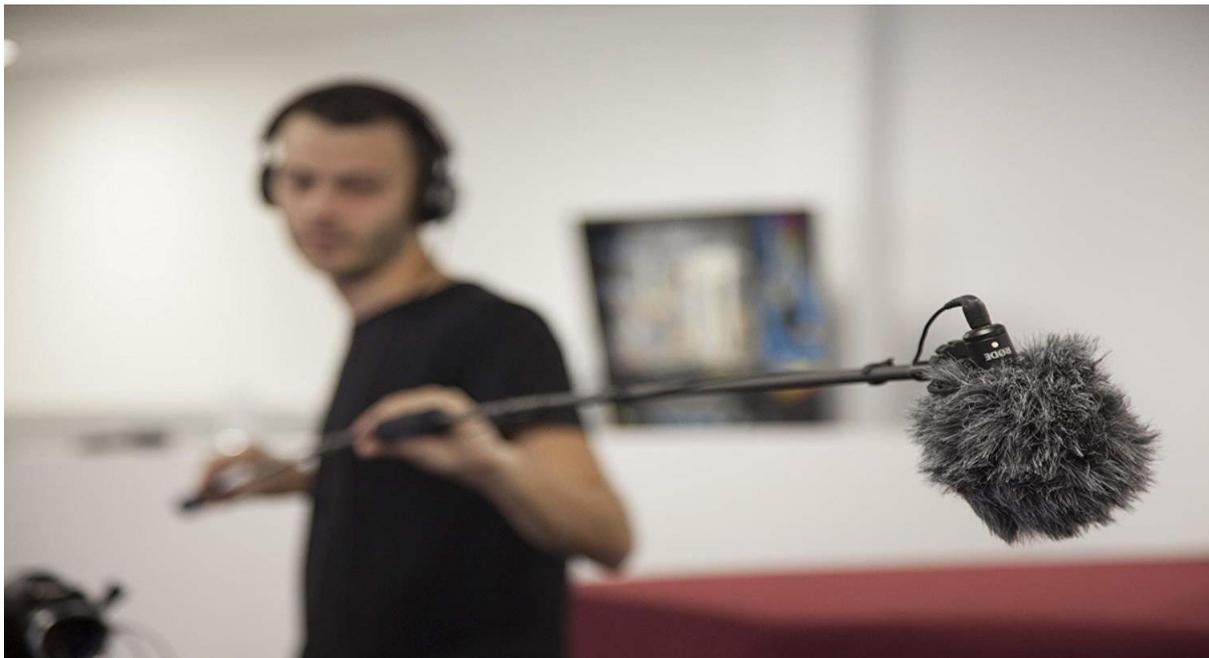


Figure 2.1 22 Boom Pole

AUDIO (XLR) CABLES:

If you decided to use a professional audio set-up with your video camera, you'll require XLR cables to go from your camera to the mic.



Figure 2.1 23 Audio XLR Cables

EDITING CONSOLE:

They are commonly your laptops or desktops nowadays. You have Non-Linear Editing (NLE) setups can now be done on your fast laptops. Technology has made it more easy that some can do primary editing on their smartphones using different applications.



Figure 2.1 24 Devices for Editing

SOFTWARE:

Editing software is not a product, but it should be included here. Otherwise, it feels incomplete not to include them in the list of media products. Editing software is sound editing and video editing software.



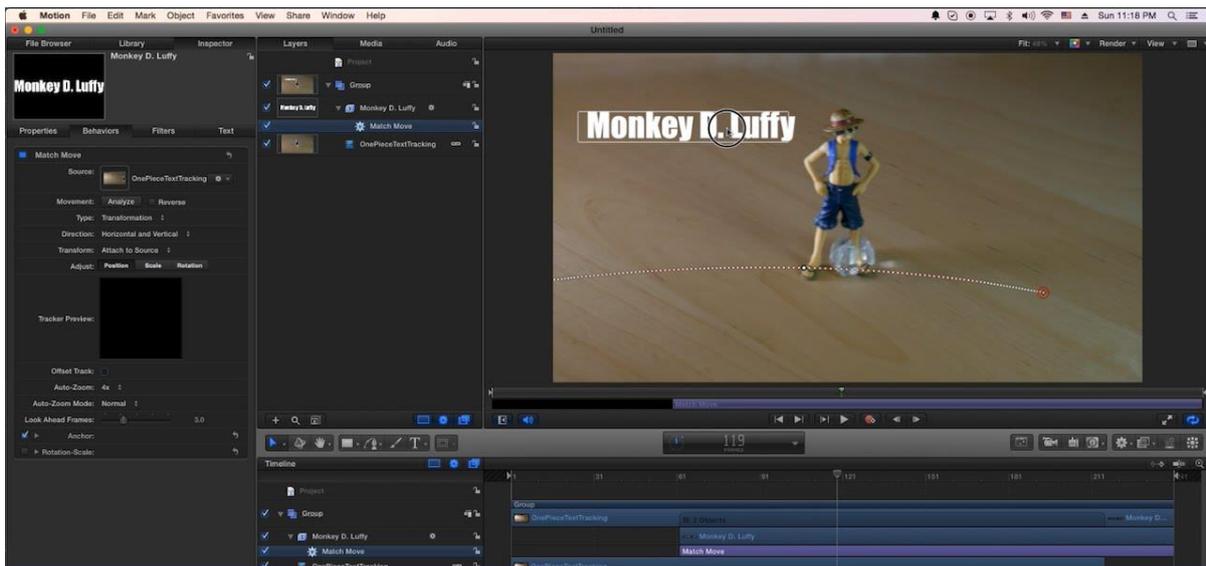
Figure 2.1 25 Software for Editing

Animation is the illusion of motions or actions created by showing a series of motionless cartoons in rapid sequence. In the world of computers, this effect can be designed by Graphics Software. An ordinary animation may be as fundamental as an animated GIF file like the pictures shown on this page. A more complicated animation could be of a human being or an alien look in a computer software game or animation of a space assault in an animation movie.

Whether you're generating a title card for your new organization, or just looking to entertain your co-workers with a brilliant appearance on the risk of hydraulic fracking, it is never a bad concept of little animation. Things are more entertaining when there's a little flicker involved. Lucky for you, a handful of appointments are out there to assist you design your own animations. From branding to marketing to entertaining, their objectives are endless, and intensely customizable for whatever it is you're going for.

APPLE MOTION:

Apple Motion, a downloadable computer graphics application for Mac OS X, is perfect for designing simple banner animations for your organization or independent programs. The updated software includes more complex characteristics like motion tracking, 3D-Compositing and vector painting.



Apple Motion 5 Tutorial

Figure 2.1 26 Apple Motion Software

ADOBE AFTER EFFECTS:

Adobe After Effects is usually used for high-end motion graphics and post-production video effects. But don't let its complex characteristics threaten you — you can also use the projects on a smaller scale for basic 2D animations. Comparable to Apple Motion, you can select from a handful of default animations and move them into an easy-to-use editing place. Again, it's a great way to design quick animations for subject series or banners.



Figure 2.1 27 Adobe After Effects Software

GO! ANIMATE:

Go! Animate is an online software you can use to design customized video animations — for business introductions, class lesson tutorials or just after-work side projects. The website software provides 50 template cartoon characters (with 150 different posture) to select from, as well as 200 props, 20 backgrounds and 20 music tracks. You can apply the program's template voices in your characters or personalize them further by recording your own voice.



Figure 2.1 28 Go Animate Software

XTRANORMAL:

Xtranormal performs similarly to Go! Animate, only here are the 3D Animations. You can select among 20 languages, 200 background sets and 500 characters (with 80 gestures) and direct up to 12 characters per "scene."

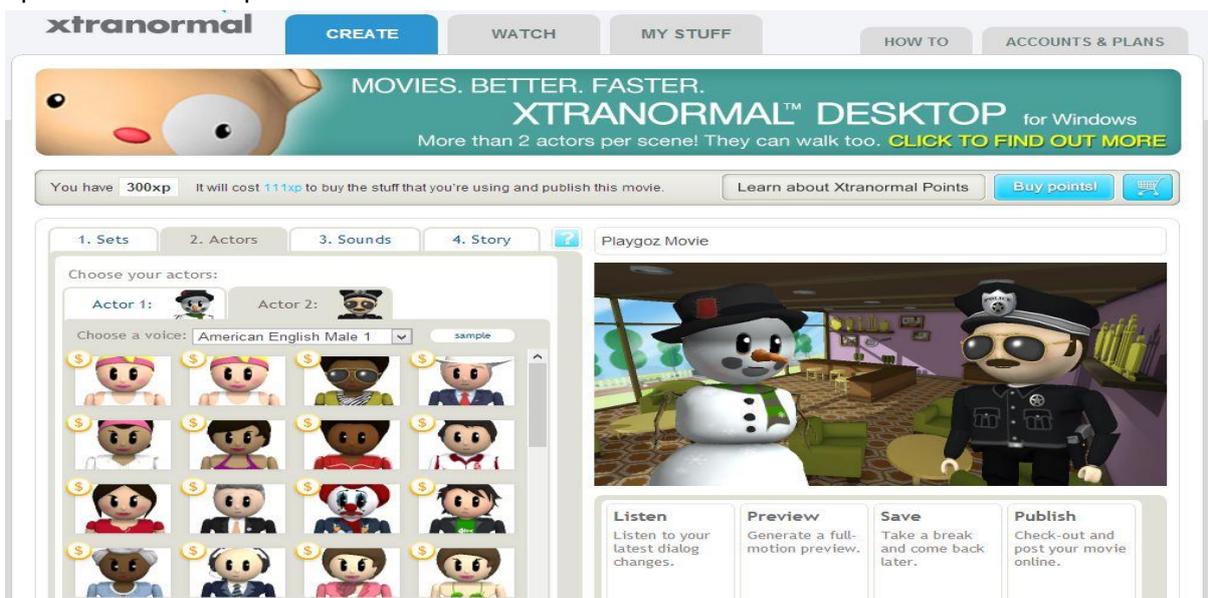


Figure 2.1 29 Xtranormal Software

WIDEO:

Wideo is a free software for designing basic animations. You can select a template, as well as images from your personal library, and customize them into short explanatory videos. The company mention that its main objective is to help businesses design simple animated demonstrations.



Figure 2.1 30 Wideo Software

Exercise



1. Write the name of few products of media industry sold by Sales Coordinator.

2. Name the equipment required to support the camera without holding it by hand.

3. How can be shooting is possible in air?

4. Name the Animation software in which vector painting is possible?

UNIT 2.2: Sales Documentation and Processes

Unit Objectives

At the end of this unit, you will be able to:

- Understand contents (stocks, amount, consumer, etc.) from the sales contracts.
- Design the work schedule, if applicable.
- Increase statements and insert information into the sales program on account of stocks sold, develop and arrange sites/ stocks trackers as applicable.
- Produce analyze and generate service orders based on ROs taken from customers/agencies.
- Create and manage reports on buyers, opponents, missing customers etc. and forward these reports to consistent company for follow up.

2.2.1 Sales Documentation

The sales cycle starts with the creation of a sales document. The sales document stores and processes the sales-related data and controls the overall processing of the sales transaction. When you receive an order from the customer, the information contained in that physical customer order—such as ordered goods or services, ordered quantity, shipping location, delivery date, and so on—is all stored in a sales document. This sales document then forms the basis for carrying out subsequent Sales Documentation process steps such as delivery, billing, and accounting postings.

Sales Document is a generic term. You can use a sales document to store and initiate processing for inquiries, quotations, sales orders, contracts, credit/debit notes, invoice corrections, free-of-charge delivery, and other similar sales processes that a user in the sales function deals with on a day-to-day basis. Each of these processes is identified and controlled using a specific sales document type; for instance, document type AF is for inquiries, AQ is for quotations, and OR is for standard orders.

Each sales document is assigned a unique document number that can be set internally by the company in the system software or externally by the user or interface program that is electronically creating the sales order in the system software. You can set up incompleteness checks in a sales document to ensure the user enters the data entry completely and to also stop the processing of subsequent steps if the document is found to be incomplete. While processing a sales document, software also carries out various basic functions such as pricing, taxation, partner determination, availability check, output determination, and so on. You can create, change, delete, and reject these sales documents. You can also create a sales document electronically using the ALE, IDOC, EDI, and BAPI technologies provided by the system software.

Origin of Data in a Sales Document:

Apart from the data that you entered manually or that came via an interface program, data in a sales document originates from a variety of other sources:

From Master Data to Sales Document: When you create a sales document, a majority of information required by the sales order is automatically derived by the document software from the master records of the customer and material number you provided on the sales document detail screen. Information derivation from the sold-to party master data includes pricing, shipping conditions, and so on. Information specific to the shipping location and taxation is pulled out from the ship-to party master, and information specific to the payment terms and credit checks is pulled from the payer master record. When the sold-to party performs all four partner functions for a sales document, all the partner-related data is pulled from the sold-to party master record. Information from the material master includes the delivery plant, weights, delivery priority information, and so on. Some miscellaneous information is also derived from various other master records such as the pricing master, customer– material info masters, output masters, and so on, based on the combination of customer and material numbers.

From Document Header to Document Item: Data for document items originates from the document header. Once copied from the header to the items in a document, this data can be manually changed in the sales document. In such a case, the manually entered data takes precedence over the automatically derived data. For example, say you have an initial customer order received with a requested delivery date of 04/06/018 for all three items; with the standard software system behavior, the date 04/06/018 is copied from the sales document header to all the items. But then say customer later sends a request to deliver item 20 by 05/06/018, keeping the schedule for item 10 and 30 intact. To incorporate this request, you manually change the requested delivery date at the item level for item 20 to 05/06/018. This manual change now takes precedence over the requested delivery date initially copied from the header data. So, the header data and items 10 and 30 show the requested delivery date as 04/06/018, and item 20 has a requested delivery date of 05/06/018.

From Source Document to Target Document: Data originated in the source document is copied to the target document. For example, when you create a sales order with reference to a quotation, Software copies the data from the quotation document to the sales order. In this case, Software will not do any derivation of data from the master records, and data copied from the quotation will be final. So, any changes made to the master data after creating the quotation will not be copied on to the sales order because the data for the sales order is copied from the quotation document that still contains the old information.

2.2.2 Sales Process

“Sales process” most frequently refers to a repeatable series of actions your sales coordinator takes with a possibility to move them from initial stage to a final customer. A good sales process helps your representatives consistently close deals by giving them a framework to follow.

Creating a repeatable, expandable sales procedure is difficult. There's no lack of drawings, techniques, or experts with conclusions on particularly how you should be doing things. So where should you start? Right here. We've get together a presentation to all things “sales process” to assist you get initiated towards defining what your organization's standard sales procedure should look like.

The popular steps of the sales procedure include:

1. Prospect:

Prospecting is the process of sourcing latest, initial stage leads to start a sales procedure with. Prospecting might include online exploration on websites like LinkedIn or Quora. It also might happen at seminars or industry meetings. And you can prospect by inquiring existing customers or associates for referrals of individuals who might be engaged in your product/service. Prospecting is a vital part of the sales process -- and part of most representatives daily or weekly workflow.

2. Connect:

Started meeting with those initial stage leads to collect information and appreciate their morality for promoting. This generally takes place during a "connect" or "discovery" meetings. The Sales Coordinator will appoint a time to understand about the program main points, challenges, and profession or career objectives. The Sales Coordinator might ask questions like, "Tell me about your role. What do you do day-to-day?" "What issue are you trying to resolve?" and "Why is this a preference today?"

3. Research:

Studying more about a vision and their organization as they progress through the sales procedure can assist sales coordinators offer a more suitable experience, and develop the possibility a deal will close. This might need the Sales Coordinator to talk with other people at the industry in various departments to get a complete view of the business and their targets over the coming year. Many longtime representatives say a good Sales Coordinator should understand the company better than their prospect who works there.

4. Present:

A common stage of many sales processes is to display a proper introduction or presentation of what is being sold. This step is of time-consumption, so it generally comes deeper in the sales process and only for well-experienced prospects. The demonstration should be customized to satisfy the prospect's unique use case and major points. The Sales Coordinator might bring an engineer or executive to the meeting with them, to demonstrate the level of service the customer will receive and to answer more technical questions.

5. Close:

This step deals with any late action of company that results as a deal comes to close. It differs broadly from company to company, and may contain things like conveying a quote or presentation, agreement, achieving the buy-in of decision makers, and other activities. The close is what every Sales Coordinator works toward. It should result in a mutually profitable legal agreement between the prospect and the dealer. Once a deal ends, the Sales Coordinator will receive commission on the amount they discussed with their customer, and the account generally passes to an account manager or customer benefit representative.

Building a Sales Process

1. Remind at the last five or 10 deals you finished. What were the main stages in the procedure? What were the touchpoints with the client? Analyze roughly how long the whole procedure took, and how much time consumed between each step. The more representation you have (and the more person on your group those examples come from), the better. Once you've identified that timeline, work slow to understand the timeline each representative should expect. For example

If six of those 10 deals ended in about six weeks, take a review at what the average actions were to get there. Working slow might appear something like this:

- One week of conference before a registered deal
- three-to-five inquiry emails and phone calls
- One demo
- One phone call and between two-to-three emails
- One discovery call
- A couple of warm emails and three phone calls to visualize

Once you understand your sales procedure, you can go into deeper to understand the deep motivations and pain points that run each deal to final stage.

2. While every sales procedure is different, possibilities are, the steps you recognized associate at least somewhat with the common steps summarized above. Your list of steps might be in brief or contain steps not listed above, but a common example is usually a good starting point.

3. For each of the steps you represent, you'll want to have a clear definition of what causes a prospect to move from one step to the next. Ideally that reason or cause will be based on the actions of the prospect, not the understanding of the sales coordinator. Ask questions like:

- "While conducting warm outreach, did a coordinator hit on a specific point(s) that motivated the prospect to schedule a discovery call?"
- "During the trial, were there arguments that interrupt the deal or recommendation that moved it forward?"

- "When you made your pitch, was the reply an immediate "yes?" If so, recognize carefully how you got there. How did you promote to the pitch?"

4. Devising your teams' sales process is a profession that never expires. Particularly in the weeks and months after you begin searching, you'll want to continue to perform based on response from your team. It's likely your sales process will progress as your team finds techniques to work more effectively and move prospects through your pipeline rapidly.

2.2.3 Common Sales Documents

Sales Documents have a specific functionality and perform different functions. If we talk about Sales Documents in Sales & Distribution, you can find different documents at every stage of the sales cycle/processing. By using different documents, you can control which information is required at each step of a business process and make sure that users follow the required procedures for processing of sales documents. Sales documents also enable you to define how software copies data from one document to the next document in the business process chain.

The standard Document Software System includes a variety of pre-defined sales documents. During the organization of your system, these standard explanations may be modified to fulfill the particular demands of your company. In addition, you may include your own sales document. The sales document in the standard system includes the following:

Inquiries and Quotations

An inquiry is a request that a buyer places on the seller to get the required information about the seller's products. It is an indication of the customer's interest toward the seller's products. A customer query may include questions about the amount of a product, its availability on a specific date, utilization of a product, and so on. You reply to the customer's query by sending a quotation. A quotation generally includes information about the product cost, any applicable terms and conditions, and the explanation to any other query from the customer's inquiry. Standard document system provides document IN for inquiries and QT for quotations, with the item categories AFN and AGN controlling the item data for inquiries and quotations, respectively. You can build an inquiry and quotation document for both products and assistance. You can also use structured products, such as bill of products, in inquiries and quotations. While building any of the two documents (IN or QT), you can give the option to your buyer by giving one or more alternatives for a specific product. To manage an alternative for a product in an inquiry or a quotation document, put the alternative product just below the main product with the reference number of the main product in the alternate product field on the alternate product line. This, where product 20 is the alternative for product 10.

Sales Returns

A sales return or product return is a procedure where the customer sends back the goods to the seller and the seller credits the buyer for the cost of the goods by generating a returns billing document. The procedure consists of generating a sales return document tracked by a returns delivery and a returns invoice/credit note. You can create returns with or without reference to a billing document. If you wish to build them with a reference to a billing document, you have to be clear that you have copy control set up between the billing and sales documents to assign this copy for your sales document.

Sales document RE with the default delivery document LR and a default billing document RE represents the sales return cycle. The SD document category is H, and the screen sequence group is RE. The document is under the default billing section that confirms the authorization of the return document by a certified person before giving credit to the buyer. Since it is an internal migration of stocks, the return documents are not suitable for credit checks. The item category REN for returns procedure is a standard return product suitable for pricing, billing and delivery and it allows schedule lines.

Debit and Credit Notes

Errors do happen in the procedure of a sales transaction. This creates a requirement for a modification or improvement procedure. Debit notes and credit notes are these modified documents. You build a debit note to debit the buyer for any under billed cost and a credit note to credit the buyer for any overbilled cost, without having any product migration. Under billing and overbilling are not the only benchmark for building debit and credit notes. There may be different other causes too. For example, you may have an agreement with your buyer to get refunded for any expense you have made in favor of your customer related to the sales transaction, such as shipping charges, insurance, and so on. In such conditions, a debit note is also used for charging these certain expenses to the consumer.

Invoice Corrections

Invoice corrections (document RK) represent the process of adjusting or correcting the customer's invoice. Unlike debit and credit sales documents where you build two different documents (one for debit and one for credit), the document RK permits you to build a single correction document for your bill. The format of the document contains a header and product data. The product data always contains two items. The first product is always a debit item, and the second product is the credit item. The net billing correction amount is a sum total of both the lines leading to an upward or downward modification of the original billing amount.

Delivery

Certain sales scenarios demand free-of-charge delivery of goods, such as samples. You can send free-of-charge deliveries to your customer using sales document FD (free-of-charge deliveries) and document SDF (subsequent free-of-charge deliveries). You use transaction code for entering these documents into the system software.

Free-of-Charge Delivery (FD)

You use sales document FD with default delivery type LF to send samples of your products to your customer. The sales procedure for FD only includes the order and delivery step and is not suitable for invoice. In modifying, the document FD organize with document category I, which classifies the sales document FD as a free-of charge order. For a free-of-charge delivery, the order reason is mandatory and is part of the incomplete process 13 allotted to the document FD. The item category is KLN and is organized as a standard item with schedule lines allowed so that you can execute an accessibility check and manage schedule lines for free-of charge deliveries. The item category is not suitable for amount or credit checks and is also not suitable for billing. Since no billing is included, the copy control setting present only for copying a sales document to a delivery (copying FD to LF).

Subsequent Free-of-Charge Delivery (SDF)

System document software provides a free-of-charge delivery sales document (SDF), on the other hand, to handle situations where goods were billed to a customer but found damaged on arrival when received by customer. In some conditions, it is worthless having these products returned, and the next delivery requires to be carried out. For example, as an issue of a consumer complaint, you now need to send the next delivery to your consumer free of charge. An SDF document is always built with reference to the standard sales document and, identical to document FD, includes only the order and delivery step. You don't bill the consumer a second time, and as a result the document is not compatible for billing.

Cash Sales

Cash sales is a specific order type available to supervise those business plans where the consumer gives the order, pays for the products, and accept the delivery at the same time. A model of this business procedure would be an over-the-counter sale. You generate cash sales using transaction code. Once you save the sales document, system software automatically creates the delivery. You cannot keep an incomplete cash sales document unless you manage all the compulsory entries. The buyer may pick up the delivery of the products at the counter, they may receive the products from the storage location, or you can even deliver the products at the buyer's specified location. The delivery document can be designed to perform all these business requirements.

Rush Orders

A rush order is a specific order type generated by the system to manage situations where you would like to generate an urgent delivery from the sales order, for example, in same-day delivery plans. The stage an order is saved, a delivery document is generated, and the storehouse can start processing the order. The billing for rush orders is generated with reference to the delivery document, and the billing amount is also created from the invoice document.

Consignment Processing

A consignment is a type of sales process where the goods are not sold to the customer in the first place. You maintain the inventory levels at a consumer-consigned location. The consumer utilizes the products on a required base from the location, and you bill the customer only for the products utilized. The products at the consumer's location are your own property, and the possession of ownership happens once they are used by and billed to the customer.

Consignment Fill-Up

Consignment fill-up is the procedure under which you deliver the inventory at the consumer's location. You generate a consignment fill-up order using transaction code. In standard system, the document KB with item category KBN is available for consignment fill-up. The item category is suitable for delivery but not suitable for billing. When you do the PGI for a delivery for a consignment fill-up order, the consigned inventory is transferred from unrestricted inventory to a specific inventory location. The ownership for the goods is still with you, and that's why, there is no invoice to the buyer at this stage of the consignment sales procedure. Since the stocks are transferred within the plant from the general warehouse to a buyer consigned location, there is no inventory appraisal entry placed to accounting either.

Consignment Issue

Consignment issue is the procedure under which you bill the consumer for the consumed products from the consigned location. You generate a consignment issue order using transaction code. In standard system, document KE with item category KEN is available for consignment issue. The item category is suitable for delivery and billing, and the specific inventory indicator in item category personalization is organized to consume from specific stock inventory W. The availability check is also executed against the consignment goods. When you do the PGI for a delivery for a consignment issue order, the consigned goods consumed to the tune of the quantity delivered via the consignment issue order, and an auditing entry for goods depletion is passed (amount of goods consumed). An invoice document is created with reference to the delivery document and deliver the sales return into the auditing books.

Consignment Pickup

Consignment pickup is the procedure where you receive the surplus, slow-utilizing, or unused goods from the consigned location and bring it back into your unlimited stock. You generate a consignment pickup order using transaction code. In standard system, document KA with item category KAN is available for consignment pickup. The item category is suitable for delivery but not for billing. The specific goods indicator in item category personalization is organized to receive from specific stock inventory W. When you do the post goods receipt (PGR) for a delivery for a consignment pickup order, the consigned products are consumed to the tune of the quantity received via the consignment pickup order, but no product-related accounting entry is passed because the goods is just transferring from the consignment location within the plant to the general warehouse. No billing is generated either.

Consignment Returns

Consignment returns is the process where you take returns for the goods that were originally billed to the customer via document KE (Consignment Issue). You generate a consignment returns order using transaction code. In standard system, document type KR with item category KRN is available for consignment pickup. The item category is suitable for delivery and for billing. The specific goods indicator in item category personalization is organized as blank because the incoming stock is actually a consumer return and not a receiving of your own stocks from a consignment location. When you do the PGR for a delivery for a consignment returns order, an auditing entry for a cost of goods sold (COGS) cancellation is passed. A credit note is created with reference to the delivery document, and it place the sales returns entry into the auditing books.

Third-Party Order Processing

Third-party order processing is a type of sales procedure wherein your dealer directly delivers the products to your customer, and you bill your customer for these products on voucher of delivery proof from the dealer. The delivery of products directly by your dealer to your customer provides you with advantages such as no stock management, storage management, or shipping hassle; no storage cost; no specific training or team to deal with the dealer's product in your storage location; and so on. Third-party processing provides your organization, to a range, with a low-cost procedure toward achieving the same targets as it would achieve by managing stocks in your own storage location and delivering the products yourself.

2.2.2 Processing Orders

Earlier, a client might have queried for the product which you have kept in the inquiry or might have queried for a quotation (which is valid for a particular time period) or have selected for a long term agreement either quantity or value. Creation of a sales order is the first step for capturing of the actual sales. This means that client has agreed to the amount which you have proposed during the inquiry and quotation phase(s).

In Sales Documentation, a sales order can be created either with or without reference to:

- Quotation, provided it is within the validity period
- Contracts, value & quantity, provided the same are within validity the dates or the value or quantity has not exceeded from the contract terms

Creating Sales Order

System software's main screen once you have logged on:

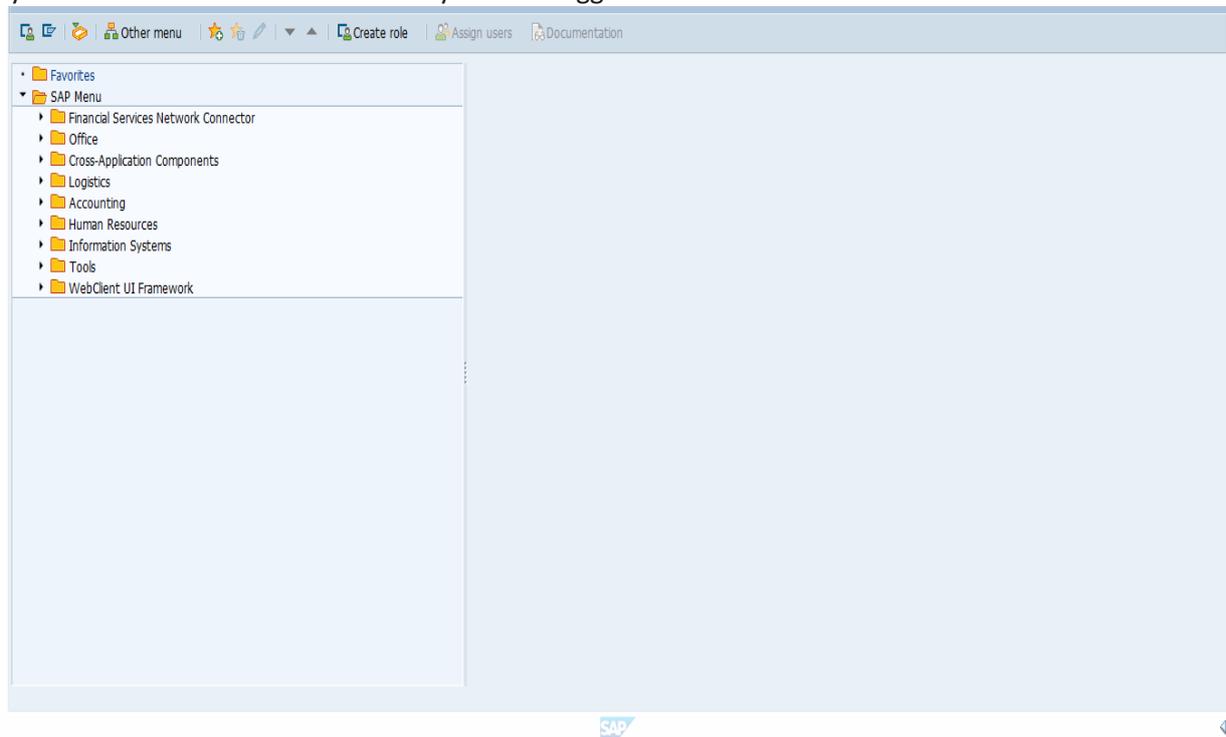


Figure 2.1 31 Easy Access

In Software, in order to reach to a particular transaction, you have the following options:

navigate through the 'Navigation Tree'

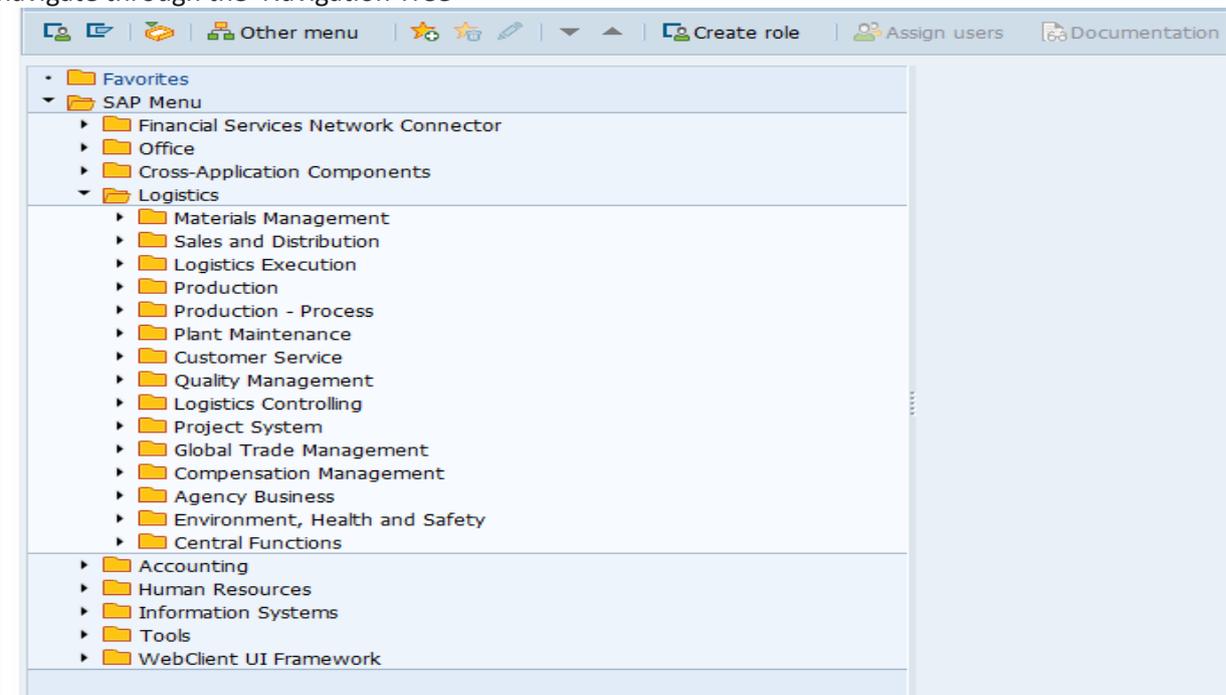


Figure 2.1 32 Menu Tree

The following is the illustration on how to fetch sales order window/screen:

Navigate through 'Tree'

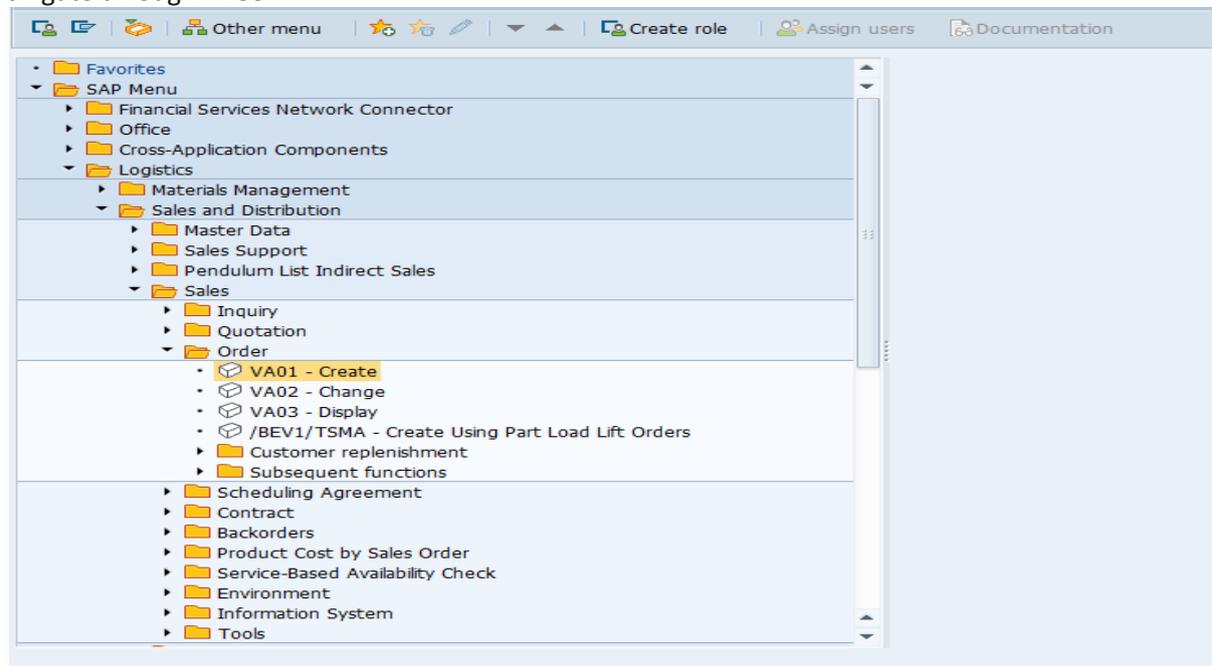


Figure 2.1 33 Transaction for Creation of Quotation

Once you have entered the Sales Order: Creation Initial screen, you have to select relevant *Order Type*. Each order type has its own performance and observance based on the configuration done at the software backend.

Select Relevant Order Types:

 A screenshot of the 'Create Sales Order: Initial Screen' in SAP. The title bar reads 'Create Sales Order: Initial Screen'. Below the title bar, there are four tabs: 'Create with Reference', 'Sales', 'Item overview', and 'Ordering party'. The 'Sales' tab is active. The main area contains an 'Order Type' field with a dropdown arrow and a checkmark icon. Below this is a section titled 'Organizational Data' with five input fields: 'Sales Organization', 'Distribution Channel', 'Division', 'Sales Office', and 'Sales Group'.

Figure 2.1 34 Create Sales Order - Initial Screen

In order to opt for a required Order type, either press *F4* on the respective field and it will show all LoVs (List of Values).

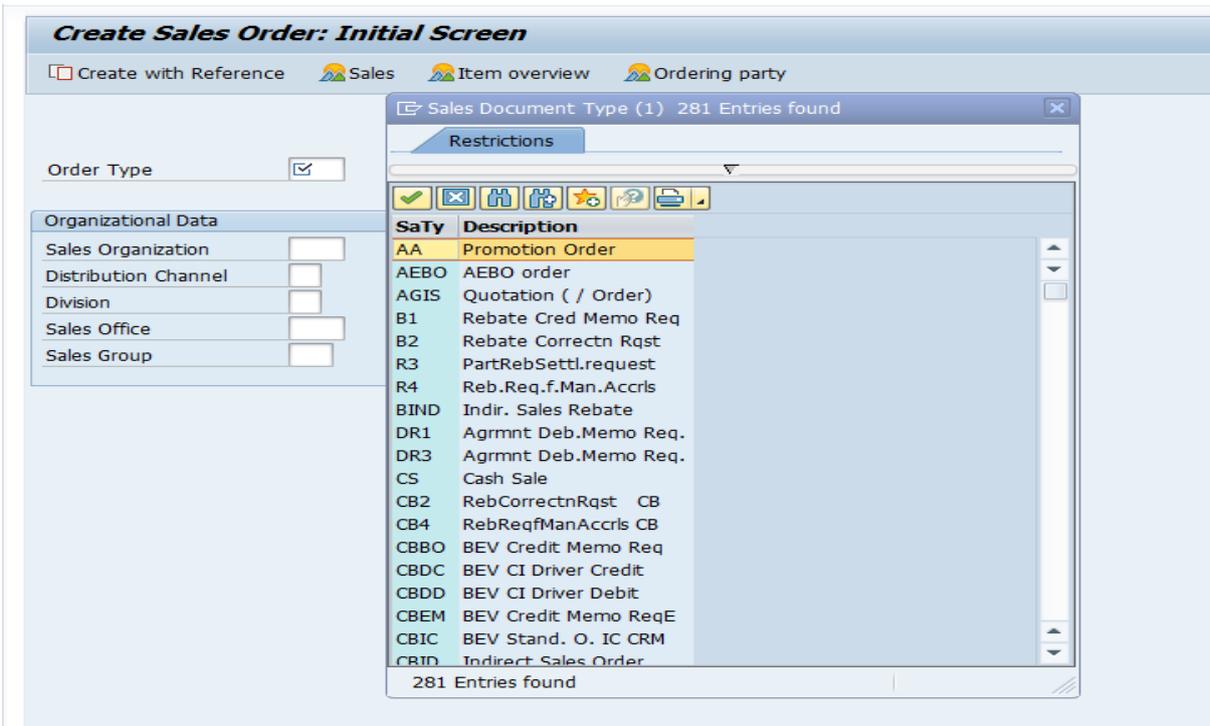


Figure 2.1 35 List with Sales Order Type

Select the relevant Order type to proceed to the next step.

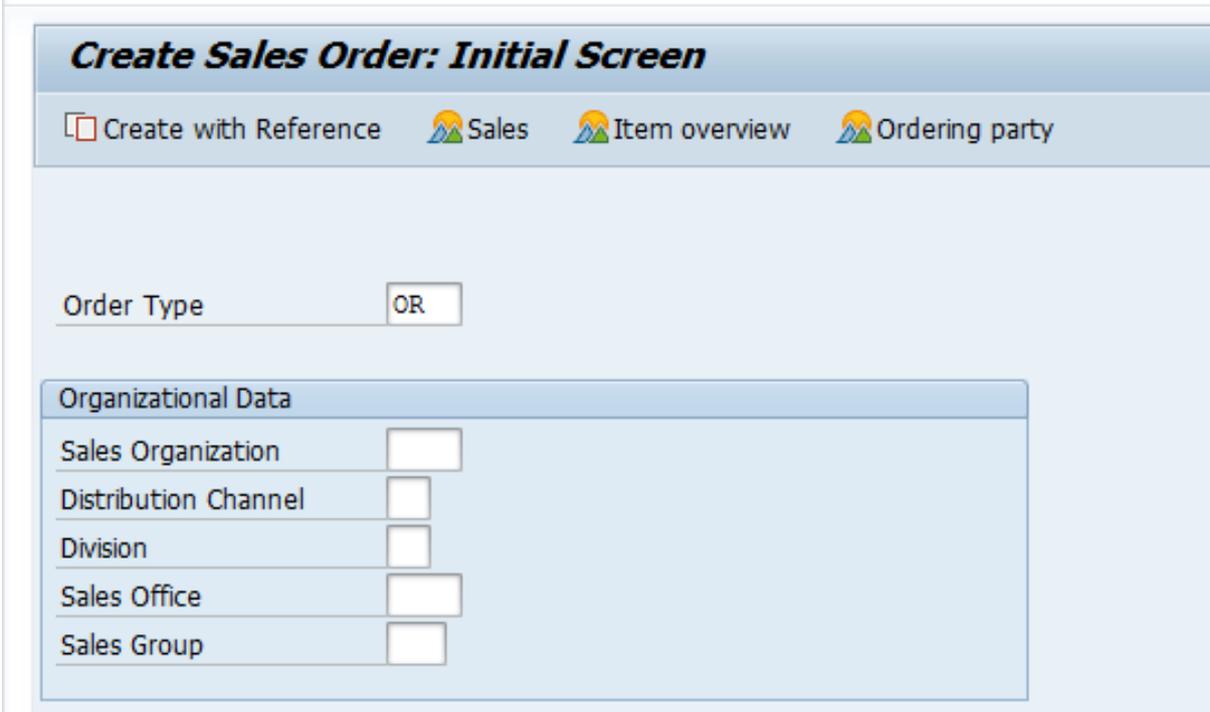


Figure 2.1 36 Create a Standard Sales Order with Type "OR"

Populate *Sales Area* with your relevant *Sales Organization*, *Distribution Channel*, and *Division*.

Create Sales Order: Initial Screen

Create with Reference Sales Item overview Ordering party

Order Type

Organizational Data	
Sales Organization	<input type="text" value="1000"/>
Distribution Channel	<input type="text" value="10"/>
Division	<input type="text" value="00"/>
Sales Office	<input type="text"/>
Sales Group	<input type="text"/>

Figure 2.1 37 Fill in Sales Area Data

If you want to create Sales Order with reference to a Quotation or a Contract, press “Create with Reference” button.

Sales document Edit Goto Environment System Help

Create Sales Order: Initial Screen

Create with Reference Sales Item overview Ordering party

Create with Reference (F8)

Order Type

Organizational Data	
Sales Organization	<input type="text"/>
Distribution Channel	<input type="text"/>
Division	<input type="text"/>
Sales Office	<input type="text"/>
Sales Group	<input type="text"/>

SAP

1:42 PM
25-Oct-16

Figure 2.1 38 Create Sales Order with Reference

Once it is pressed, select the relevant tab.

Figure 2.1 39 Create with Reference- Options

Enter the document number and either “Item Selection”, if there are various items in the referencing document and you want to opt a particular item which should be copied in the sales order or select “Copy” directly. In our condition, we are going to generate Sales Order directly. Press *Enter* to continue and enter in the Sales Order screen. Once you press *Enter*, you will enter into the sales order screen.

Partners Involved in Creation of Sales Order

- Sold-To Party: the individual that inquired the products
- Ship-To Party: to whom products are being delivered to
- Bill-To Party: the individual that is responsible to accept the bill
- Payer: the individual responsible for the payment

Entering the Customer – Sold-To and Ship-To

Create Standard Order: Overview

Standard Order Net value

Sold-To Party

Ship-To Party

PO Number PO date

Req. deliv.date Deliver.Plant

Complete delv. Total Weight

Delivery block Volume

Billing block Pricing date

Payment card Exp.date

Card Verif.Code

Payment terms Incoterms

Order reason

Item	Material	Order Quantity	Un	Description	S	Customer Material Num	ItCa	DGIP	HL Item	D	First date	Plnt	Batch	CnTy	Amou
										D	04.11.2016				
										D	04.11.2016				

Figure 2.1 40 Create Standard Order

You can see Sold-to Party and Ship-to Party fields at the top left of the screen just below Standard Order field. One Sold-to Party can have multiple Ship-to Parties. If there are many Ship-to parties involved with one Sold-to Party, a chat box will pop up in the order screen. You have to select the suitable Ship-to Party which the Sold-to Party has instructed you to ship the products at.

Create Standard Order: Overview

Standard Order Sold-To Party Ship-To Party PO Number

Req. deliv.date Complete delv.

Delivery block Billing block Payment card Card Verif.Code Payment terms Order reason

Restrict Value Range (1)

Customers (general) Customers per sales group Customers by Address...

Sales Organization Search term Country Postal Code City Name Customer Distribution Channel Division Sales Office Sales Group

Maximum No. of Hits

Plnt	Batch	CnTy	Amou
16			
16			

Figure 2.1 41 Search for Customer (Sold to Party)

Press F4 or button to search for your relevant Sold-to Party. You can search by Search Term provided in the customer master data or also by Name. To stay limited with your search, enter proper Sales Organization, so that only clients kept in your sales organization will be displayed.

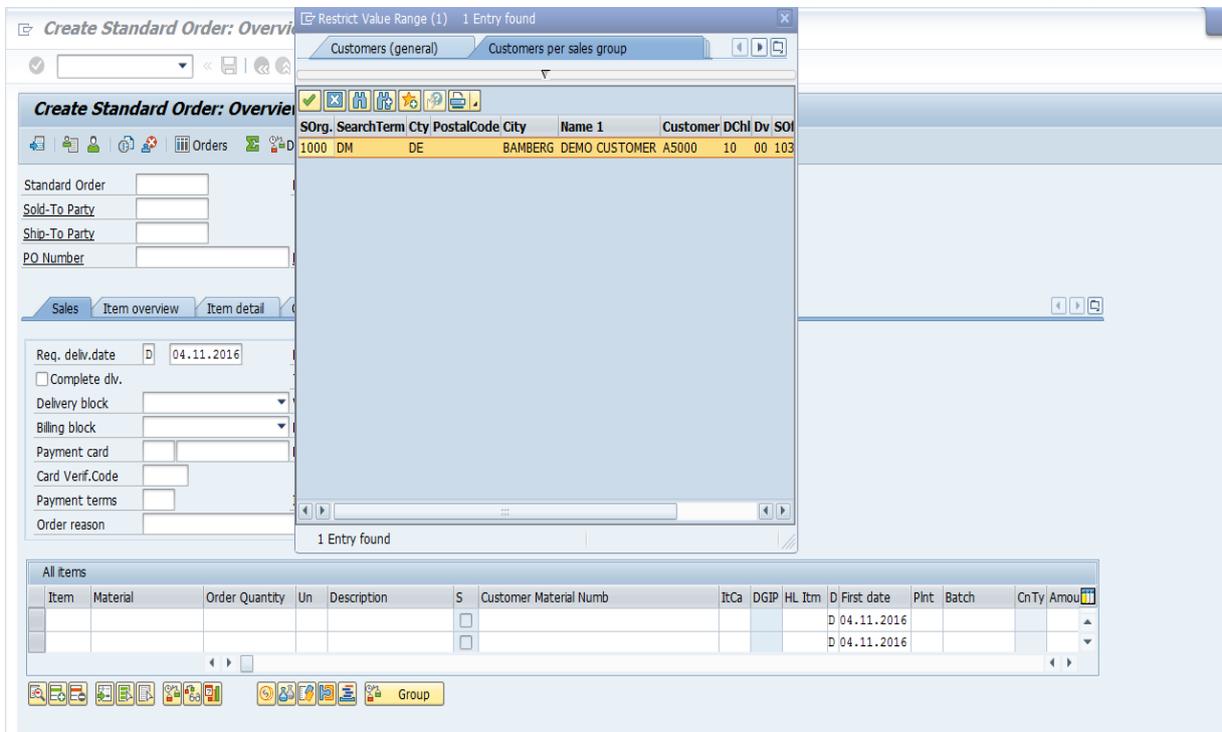


Figure 2.1 42 Search Results

Double click on the needed customer line in order to select that client.

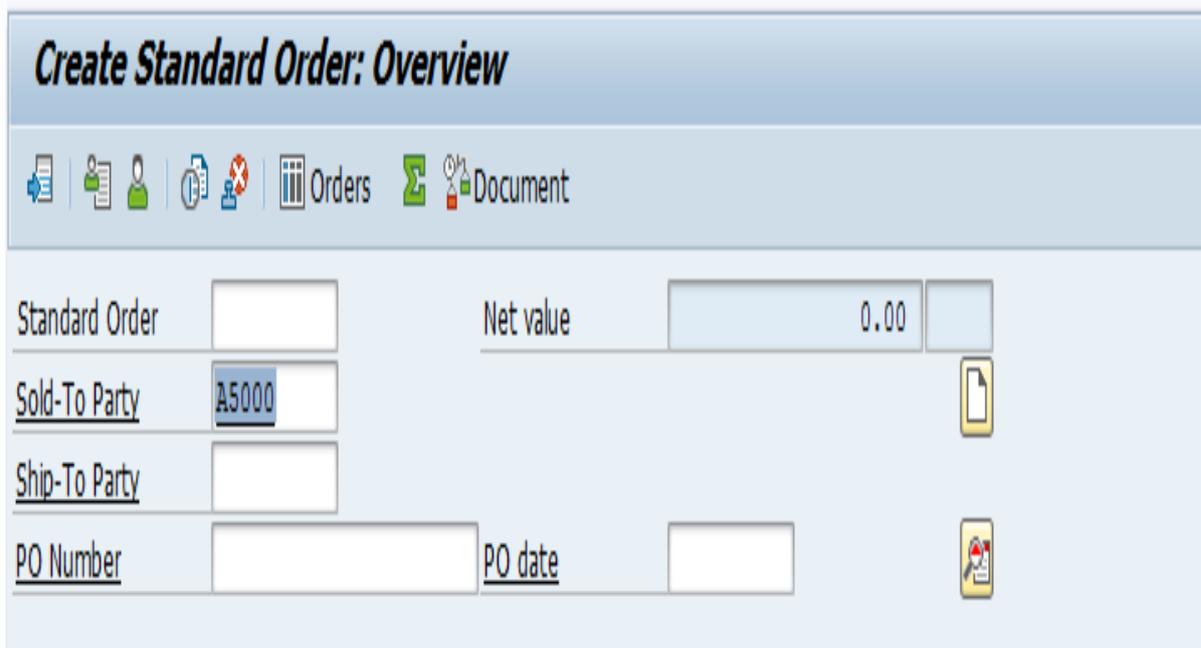


Figure 2.1 43 Sold To Party Populated into the Sales Order

Press Enter once you have selected the Sold-to Party, so that the system can accept the customer and proceed with the sales order creation.

Create Standard Order: Overview

Standard Order Net value EUR

Sold-To Party Demo Customer / D- Bamberg

Ship-To Party Ship-to location #1 / Kaiserstrasse 59 / D-60329 Frankfurt-Ba...

PO Number PO date

Partner selection

Func Name	M	P	Title	Name 1
SH			Ship-to party	
			Company	Demo Customer
				Ship-to location #1

Order reason

All items

Item	Material	Order Quantity	Un	Description	S	Customer Material Num	ItCa	DGIP	HL Itm	D First date	Plnt	Batch	CnTy	Amou
					<input type="checkbox"/>					D 04.11.2016				
					<input type="checkbox"/>					D 04.11.2016				

Figure 2.1 44 Select Ship to Part for Sales Order

Since this client has two Ship-to Parties, a chat box is popped up to choose the related one which your client, Sold-to, has notified. Double click on the needed one and the same will be selected.

Create Standard Order: Overview

Standard Order Net value EUR

Sold-To Party Demo Customer / D- Bamberg

Ship-To Party Ship-to location #1 / Kaiserstrasse 59 / D-60329 Frankfurt-Ba...

PO Number PO date

Figure 2.1 45 Sold to Party and Ship to Party Selected

Sales Order Screen Interface

This part is called header of the sales order:

Create Standard Order: Overview

Standard Order Net value EUR

Sold-To Party Demo Customer / D- Bamberg

Ship-To Party Ship-to location #1 / Kaiserstrasse 59 / D-60329 Frankfurt-Ba...

PO Number PO date

Figure 2.1 46 Sales Order Header

This part is called overview of the sales order:

Sales | Item overview | Item detail | Ordering party | Procurement | Shipping | Reason for rejection

Req. deliv.date Deliver.Plant

Complete div. Total Weight

Delivery block Volume

Billing block Pricing date

Payment card Exp.date

Card Verif.Code

Payment terms Special Payment T... Incoterms Hamgurg

Order reason

Figure 2.1 47 Sales Order Overview

This is called the line item part of the Sales Order where Materials to be sold are maintained.

All items

Item	Material	Order Quantity	Un	Description	S	Customer Material Numb	ItCa	DGIP	HL	Itm	D	First date	PInt	Batch	CnTy	Amou
					<input type="checkbox"/>						D	04.11.2016				
					<input type="checkbox"/>						D	04.11.2016				

Group

Figure 2.1 48 Line Items in Sales Order

Add Materials to Sales Order

Use *F4* to search for the material the same way we did for the customer and repeat the same process for entering multiple line items (if required).

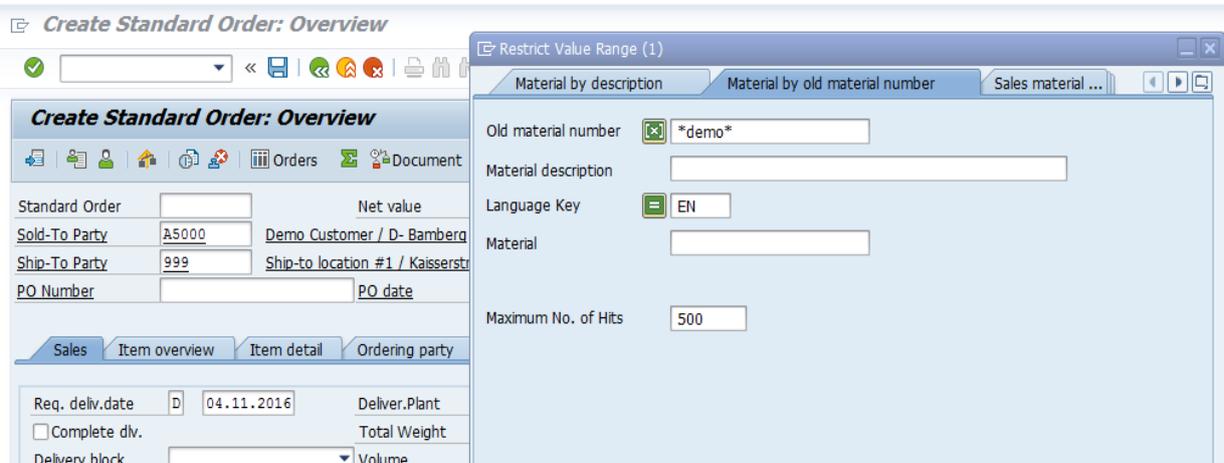


Figure 2.1 49 Search for Materials

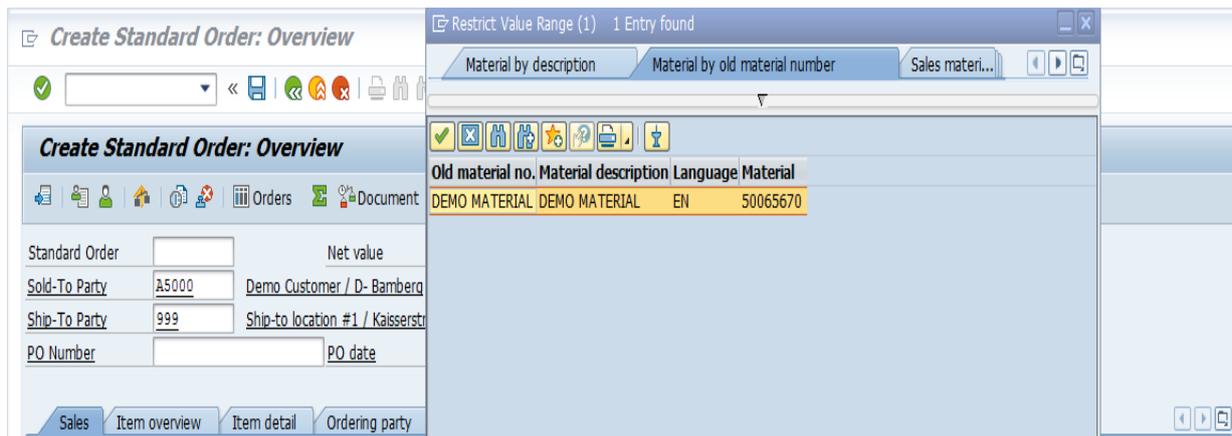


Figure 2.1 50 Select Materials to be added to Sales Order

Double click on the desired material to select

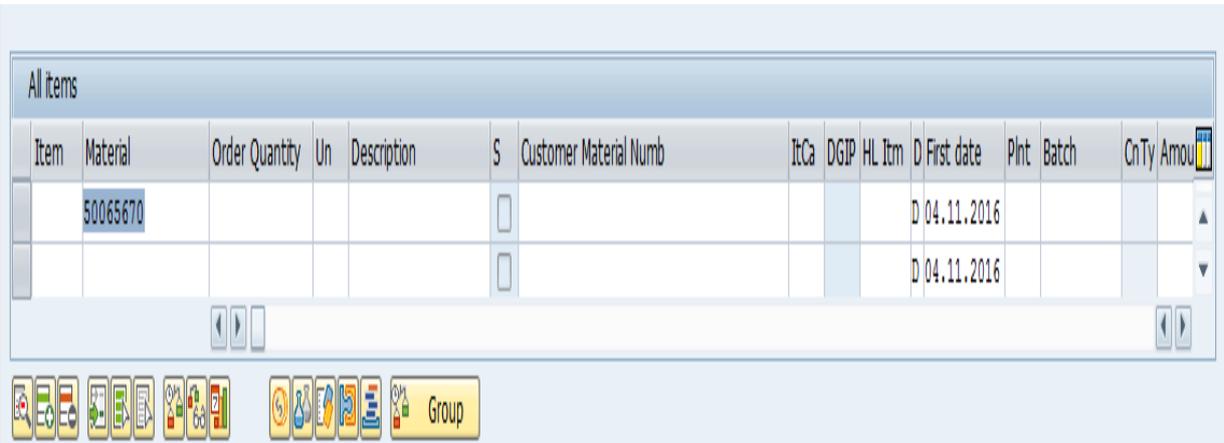


Figure 2.1 51 Materials Number Added to Sales Order

Enter quantity, if you press *Enter* after selecting the material, without entering the Quantity, the system will prompt.

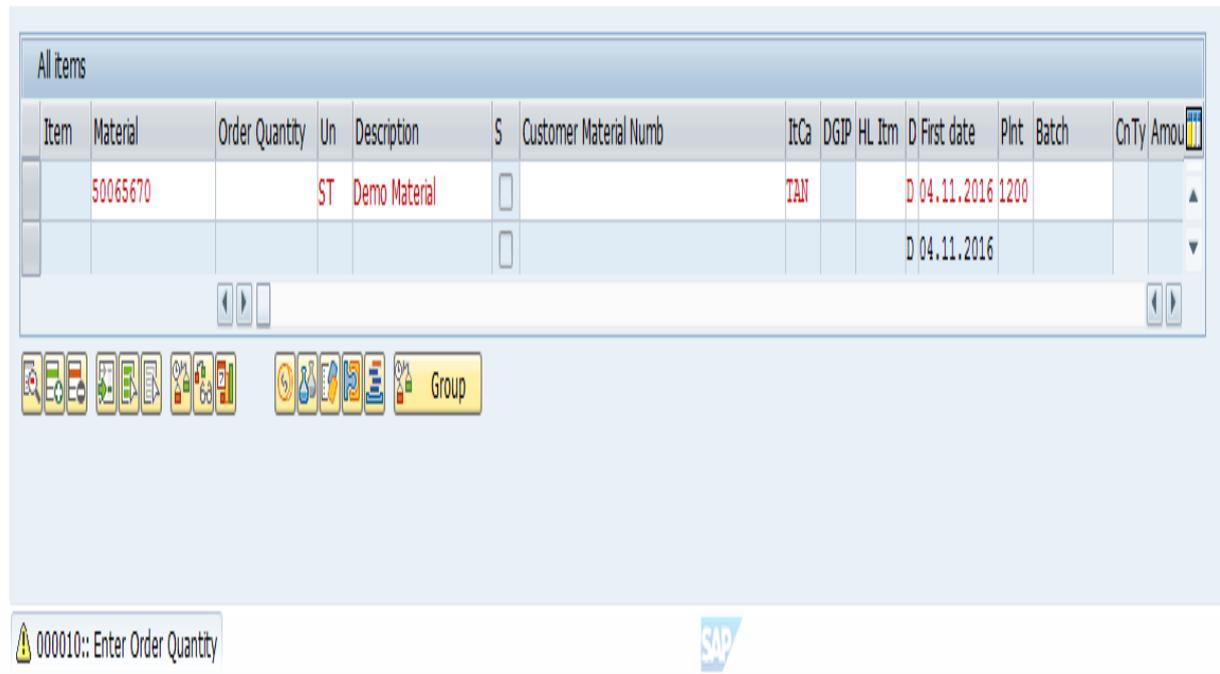


Figure 2.1 52 Enter Quantity Warning

Incompletion Log for Sales Orders

Go to *Edit > Incompletion Log* to see if the sales order created is complete.

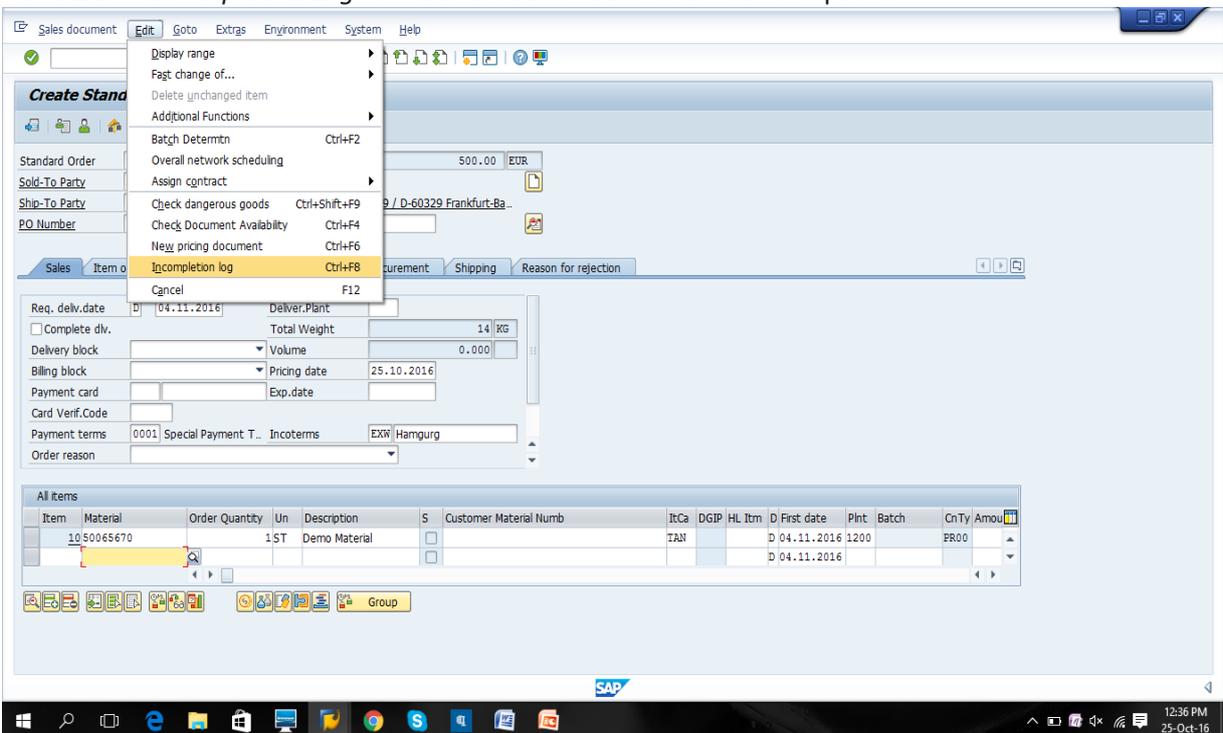


Figure 2.1 53 Open Incompletion Log

If the document is complete, the system will prompt the relevant message accordingly that “Order is Complete”.

The screenshot displays the SAP 'Create Standard Order: Overview' window. The document is marked as complete, indicated by a green checkmark and the message 'Document is complete' at the bottom left. The net value is 500.00 EUR. The sales order is for a demo customer with a net value of 500.00 EUR. The shipping location is Kaiserstrasse 59, D-60329 Frankfurt-Ba. The delivery date is 01.11.2016, and the pricing date is 25.10.2016. The order reason is EXW Hamgurg. The document is complete.

Item	Material	Order Quantity	Un	Description	S	Customer Material Numb	ItCa	DGIP	HL Itm	D First date	Plnt	Batch	CnTy	Amou
	1050065670	1	ST	Demo Material			TAN			D 01.11.2016	1200		FR00	
										D 01.11.2016				

Figure 2.1 54 Sales Order is Complete (No Mandatory information is Missing)

Exercise



1. How data enter in Sales Document? Describe each sources briefly.

2. What are the five stages of Sales process? Describe each stage briefly.

3. What are the common Sales Documents in a Standard Document System? Explain each document briefly.

4. Name the partners involved in creation of Sales Order.

UNIT 2.3: Microsoft Excel for Sales Processing

Unit Objectives

At the end of this unit, you will be able to:

- Understand contents (stocks, amount, consumer, etc.) from the sales contracts.
- Design the work schedule, if applicable.
- Increase statements and insert information into the sales program on account of stocks sold, develop and arrange sites/ stocks trackers as applicable.
- Produce analyze and generate service orders based on ROs taken from customers/agencies.
- Create and manage reports on buyers, opponents, missing customers etc. and forward these reports to consistent company for follow up.

2.3.1 Sales Processing Using MS Excel

In today's competitive business outlook, no business will achieve success without a thorough, flexible, strategic sales plan. To build up and maintain customers, all businesses depends on their strategic sales teams to understand the market's changing demands — and to meet these needs. However, the first action in a profitable sales strategy is accurate sales plan.

Microsoft Excel provides businesses the tools they require to create the most of their data. And when it happens to preparing the most of resources, and boosting revenue on investment, this is becoming progressively essential. Companies are gathering ever-greater amount of data from various resources, containing in-store-transactions, online sales and social media. They require to be capable to collect and evaluate this information faster and efficiently.

Excel spreadsheets are generally used across business to demonstrate financial information and other data compatible to the functioning of the business. This could be information suitable to the customer relationship management department, sales, marketing or HR. With so many business affairs, now dependent on IT and the internet, Excel continues to be seen as an essential tool for organization and the productive running of a business.

Here are few formats or templates used in Sales Processing using MS Excel:

SALES PLAN TEMPLATE

This template allows you to plan your sales goals with the flexibility and functionality of an Excel spreadsheet. This sales plan template is break down into 12 months and different product lines. The template contains columns for the previous year's performance, recent sales objectives, and result. Build an annual sales plan, and correlate statistics over time and across products.

SALES TRACKER TEMPLATE

This sales tracker template makes it easy to keep track of items sold, along with profit per item and total earned income. You can also track costs, including freight charges, and benefits. This template would be particularly beneficial for a new business, online retail sales, or any small business which needs to track sales and revenue.

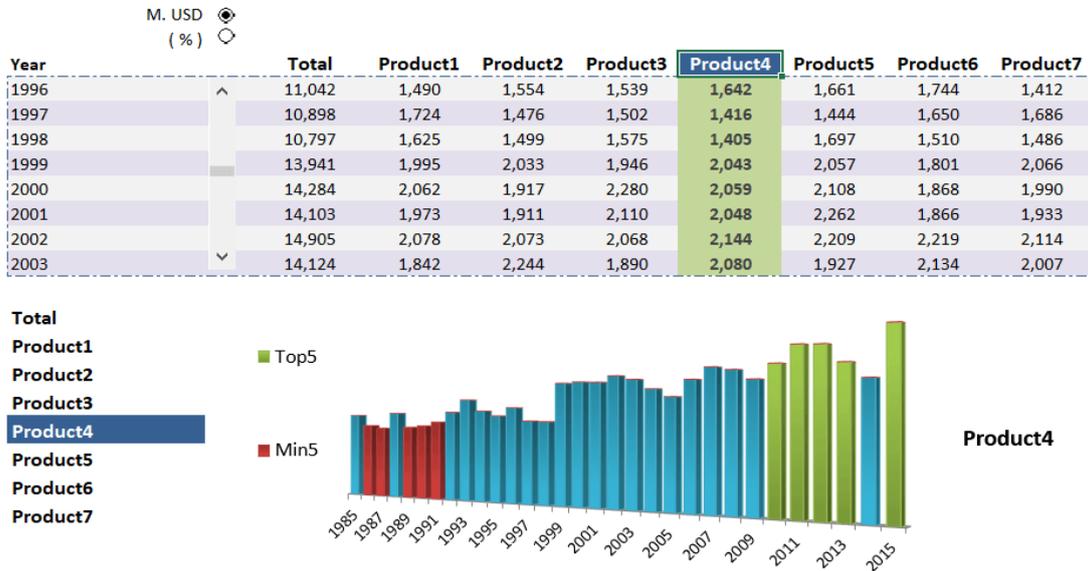


Figure 2.1 57 Sales Tracker Template

SALES PIPELINE TEMPLATE

Another alternative to CRM software and designed with small businesses in mind, this sales pipeline template keeps track of contacts and estimated sales. It also specifies a periodically sales forecast, along with space to record deal status, estimated closing date, and further actions. This ordinary template is easy to modify and provides as a organization tool for your sales pipeline.

SALES PIPELINE

QUARTER	LEAD			FINANCE			ACTION			ADDITIONAL INFO
	COMPANY NAME	CONTACT NAME	SALES REP	SIZE OF DEAL	PROBABILITY OF DEAL	WEIGHTED FORECAST	DEAL STATUS	PROJECTED CLOSING DATE	NEXT ACTION	NOTES
QUARTER 1				\$ 1,000,000.00	75%	\$ 750,000.00				
				\$ 2,000,000.00	50%	\$ 1,000,000.00				
				\$ 500,000.00	10%	\$ 50,000.00				
				\$ 1,000,000.00	75%	\$ 750,000.00				
				\$ 2,000,000.00	50%	\$ 1,000,000.00				
				\$ 500,000.00	10%	\$ 50,000.00				
			\$ 7,000,000.00		\$ 3,600,000.00					
QUARTER 2				\$ 1,000,000.00	75%	\$ 750,000.00				
				\$ 2,000,000.00	50%	\$ 1,000,000.00				
				\$ 500,000.00	10%	\$ 50,000.00				
				\$ 1,000,000.00	75%	\$ 750,000.00				
				\$ 2,000,000.00	50%	\$ 1,000,000.00				
				\$ 500,000.00	10%	\$ 50,000.00				
			\$ 7,000,000.00		\$ 3,600,000.00					
QUARTER 3				\$ 1,000,000.00	75%	\$ 750,000.00				
				\$ 2,000,000.00	50%	\$ 1,000,000.00				
				\$ 500,000.00	10%	\$ 50,000.00				
				\$ 1,000,000.00	75%	\$ 750,000.00				
				\$ 2,000,000.00	50%	\$ 1,000,000.00				
				\$ 500,000.00	10%	\$ 50,000.00				
			\$ 7,000,000.00		\$ 3,600,000.00					
QUARTER 4				\$ 1,000,000.00	75%	\$ 750,000.00				
				\$ 2,000,000.00	50%	\$ 1,000,000.00				
				\$ 500,000.00	10%	\$ 50,000.00				
				\$ 1,000,000.00	75%	\$ 750,000.00				
				\$ 2,000,000.00	50%	\$ 1,000,000.00				
				\$ 500,000.00	10%	\$ 50,000.00				
			\$ 7,000,000.00		\$ 3,600,000.00					
GRAND TOTAL				\$ 28,000,000.00		\$ 14,400,000.00				

Figure 2.1 58 Sales Pipeline Template

SALES FORECASTING TEMPLATE

This sales template maintains a 12-month sales estimate and sales record for previous years, but you can personalize it to display six months, 12 months, 24 months, 36 months, five years, or any other duration of time that matches a plan or initiative. Enter product names, customer groups, or other division compatible to your business into the first column, and then include your estimated monthly sales, taking occasional or other variations into consideration. The template will forecast the total sales amount for the year. This basic calculation spreadsheet can be an essential tool for making strategy for your budget, stocks, and staffing requirement.



Sales forecast

Your business name Sales forecast <year>

Hover over the small red triangles for instructions.

Product or Service	Mark up Margin %	Cost of Goods Sold per Unit	Unit Sales Forecast, Sales Margin Method												Total	
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Product 1																
Product 2																
Product 3																
Product 4																
Product 5																
Product 6																
Product 7																
Product 8																
Product 9																
Product 10																
Forecast Monthly Units																
Product or Service	Unit Retail Selling Price	Unit	Forecast Sales Value (\$), Sales Margin Method												Total	
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Product 1	\$ -															\$ -
Product 2	\$ -															\$ -
Product 3	\$ -															\$ -
Product 4	\$ -															\$ -
Product 5	\$ -															\$ -
Product 6	\$ -															\$ -

Product 6 developed by the Small Business Development Corporation www.smallbusiness.wa.gov.au

Figure 2.1 59 Sales Forecasting Template

SALES AND MARKETING PLAN TEMPLATE

Creating an effective sales and marketing plan may involve market research and analysis, evaluating your competition, looking at your sales history, examining future sales projections, and more. Once you have sufficient information to create a sales plan, a template can assist you set up the plan into actions that will achieve sales. This sales and marketing plan template maintain space for determining your sales objectives, target customers, strategies for engaging those customers, marketing strategies and messages, scheduled action steps, and outcome.

SALES & MARKETING PLAN

GOAL	TARGET	STRATEGIES	TACTICS / MESSAGES	CALENDAR	MEASUREMENT
Specific, measurable objectives to accomplish in an established time period.	Specific targets, reachable segments of people with similar needs or interests, motivations, demographics, locations, etc.	Strategies to attract the specific people or organizations you're trying to reach with a compelling offer that meets their interests/needs.	Tools or channels you'll use to reach your targets. What's unique about your story/product/services/bio/history that connects with your target audience? Which messages will be persuasive?	Specify which activities you will do daily, weekly, monthly or quarterly to achieve your goals. What time of day or day of week is most effective for each activity?	How will you track results? How will you compare the effectiveness of each tactic? How will you calculate the time/ money/ # of contacts it takes to attract/retain each customer/client?
GOAL	TARGET	STRATEGIES	TACTICS / MESSAGES	CALENDAR	MEASUREMENT

Figure 2.1 60 Sales and Marketing Plan Template

SERVICE INVOICE TEMPLATE

Use this invoice template for any services provided to a client. The form consists of a table to record service information, hours spent, and rate, as well as any concession or taxes. Simply add customers and dealer contact information, and add any extra details that either team requires. This template is accessible in both Microsoft Excel and Word formats.

[Company Name]

INVOICE

[Street Address]
[City, ST ZIP]
Phone: (000) 000-0000

INVOICE #	DATE
2034	2/21/2018

BILL TO
 [Name]
 [Company Name]
 [Street Address]
 [City, ST ZIP]
 [Phone]
 [Email Address]

CUSTOMER ID	TERMS
564	Due Upon Receipt

DESCRIPTION	QTY	UNIT PRICE	AMOUNT
Service Fee	1	200.00	200.00
Labor: 5 hours at \$75/hr	5	75.00	375.00
New client discount		(50.00)	(50.00)
			-
			-
			-
			-

Figure 2.1 61 Service Invoice Template

FINANCIAL VISION TEMPLATE

Use this template to create a more comprehensive vision of your financial goals. Record each financial goal (in dollar amount and estimated timeline), any potential barrier, and proper actions taken to achieve each objective. This template can provide a high standard map of where you want to go economically and help you start creating mini action plans.

BUSINESS BUDGET TEMPLATE

CURRENT BUDGET: GOODS									
CATEGORY	TASK	LABOR HRS	RATE	MATERIALS UNITS	\$/UNIT	FIXED COST	BUDGET	ACTUAL	UNDER/OVER
Task		10	\$ 15.00	50	\$ 10.00	\$ 200.00	\$ 850.00	\$ 800.00	\$ (50.00)
Task							\$ -	\$ -	\$ -
Task							\$ -	\$ -	\$ -
Task							\$ -	\$ -	\$ -
							\$ 850.00	\$ 800.00	\$ -
CATEGORY							\$ -	\$ -	\$ -
Task							\$ -	\$ -	\$ -
Task							\$ -	\$ -	\$ -
Task							\$ -	\$ -	\$ -
Task							\$ -	\$ -	\$ -
							\$ -	\$ -	\$ -
CATEGORY							\$ -	\$ -	\$ -
Task							\$ -	\$ -	\$ -
Task							\$ -	\$ -	\$ -
Task							\$ -	\$ -	\$ -
Task							\$ -	\$ -	\$ -
							\$ -	\$ -	\$ -
TOTAL							\$ 850.00	\$ 800.00	

CURRENT BUDGET: SERVICES			
SUMMARY	BUDGET	ACTUAL	UNDER/OVER
Total Income	\$ 7,270.00	\$ 7,020.00	\$ 250.00
Total Expenses	\$ 2,423.00	\$ 2,250.00	\$ 173.00

INCOME			
OPERATING INCOME	BUDGET	ACTUAL	UNDER/OVER
Category 1	\$ 6,000.00	\$ 6,000.00	\$ -
Category 2	\$ 200.00	\$ 150.00	\$ (50.00)
Category 3	\$ 100.00	\$ 100.00	\$ -
Category 4	\$ 55.00	\$ 20.00	\$ (35.00)
Category 5	\$ 500.00	\$ 500.00	\$ -
Category 6	\$ 300.00	\$ 200.00	\$ (100.00)
Category 7	\$ 115.00	\$ 50.00	\$ (65.00)
TOTAL	\$ 7,270.00	\$ 7,020.00	

Figure 2.1 62 Financial Vision Template

SALES FUNNEL TEMPLATE

This sales funnel template gives a visual description of the sales procedure, in addition to whatever sales data you want to include. The template can be used as a scorecard to appraise sales development, and the funnel makes it simple to visualize the actions in your sales procedure. This template is simple but effective tool for reaching sales and business goals.

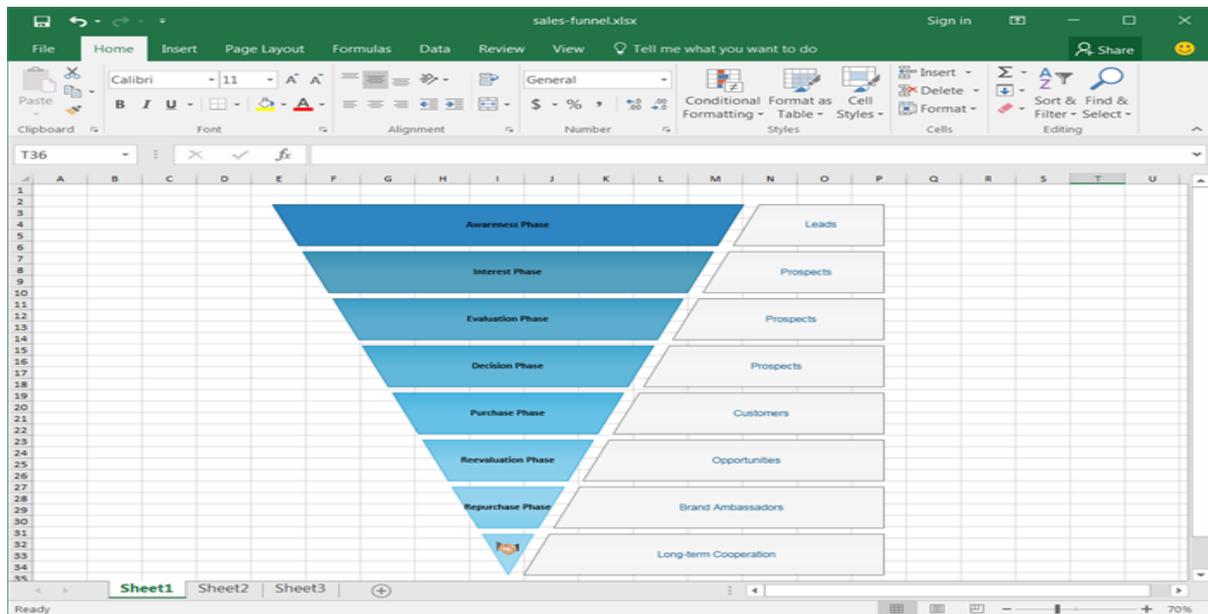


Figure 2.1 63 Sales Funnel Template

SALES REPORT TEMPLATE

Track monthly, quarterly, and yearly sales activity with this sales report template. Modify the template or use the predefined columns to keep track of sales and relevant data. This sales report template also contains a monthly estimate displaying sales history and forecast. Use this template to track progress, plan future objectives, and generate a sales report with attractive visual design.

DATE	COMPANY	AMOUNT	PLANNED	COST	REVENUE	MON
4/23/2013	A. Datum Corporation	\$6,400.00	\$6,200.00	\$4,450.00	\$1,950.00	April
4/25/2013	Contoso Pharmaceuticals	\$8,200.00	\$8,000.00	\$6,400.00	\$1,800.00	April
5/7/2013	Consolidated Messenger	\$4,400.00	\$4,200.00	\$2,600.00	\$1,800.00	May
5/14/2013	Proseware, Inc.	\$5,400.00	\$5,500.00	\$4,500.00	\$900.00	May
5/14/2013	School of Fine Art	\$5,800.00	\$6,000.00	\$4,500.00	\$1,300.00	May
5/29/2013	Trey Research	\$6,200.00	\$6,000.00	\$4,500.00	\$1,700.00	May
6/10/2013	A. Datum Corporation	\$6,900.00	\$7,500.00	\$5,400.00	\$1,500.00	June
6/21/2013	Contoso Pharmaceuticals	\$7,500.00	\$7,200.00	\$6,500.00	\$1,000.00	June
7/6/2013	Consolidated Messenger	\$8,700.00	\$8,500.00	\$7,250.00	\$1,450.00	July
8/5/2013	Proseware, Inc.	\$8,500.00	\$8,300.00	\$7,100.00	\$1,400.00	August

Figure 2.1 64 Sales Report Template

COLD EMAIL TEMPLATE

Emailing a cold prospect requires finesse, brevity, and an emphasis on the value you have to offer. If you can solve a problem for the prospect, it may boost your possibility of getting a positive response from that cold email. Copy and paste this sales email template into your email provider to save time, or utilize it to trigger your own ideas for how to efficiently email new leads.

A few ideas: how you can improve sales with {{Service}}

My name is {{Name}} and we work with companies like {{Company Name}} to improve their sales.

I've already started looking at {{Company Name}} and I have a few ideas about how you can drastically increase your {{Type of Sales}}. For example, {{How You Can Help with Existing Issue}}.

I have a lot more ideas running through my head but I can't bear to let them go over email! Do you have time on {{Date and Time}} for a 15 minute Google Hangout or Skype call?

With gratitude,

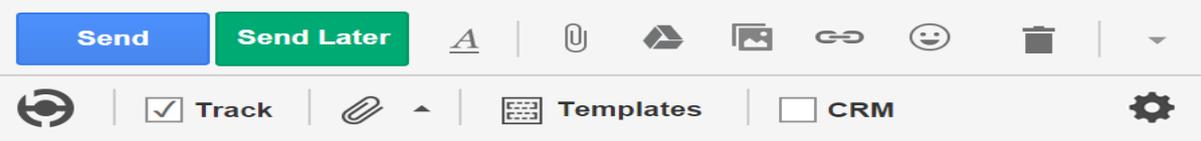


Figure 2.1 67 Cold E-Mail Template

Exercise



1. Which software an organization uses to store their sales data?

2. Write the name of some formats or templates used in Sales Processing? Describe them briefly.

3. Which template is used for tracking sold items and profit earned per item?

4. Which template should be used to track your organization's progress and plan for future goals?



3. MIS Report

Unit 3.1 – Data Compilation and MIS in MS Excel



Key Learning Outcomes



At the end of this module, you will be able to:

- Understand the various category of reports proposed by the authority/other internal affairs.
- Arrange and submit data in the detailed format to satisfy the demands.
- Answer positively to comments and changes in requirements.
- Constantly analyze the report to describe trending key points and other differences.
- Suggest information in an easy way to explain formats, that is satisfactory for the organization.

UNIT 3.1: Data Compilation and MIS in MS Excel

Unit Objectives

At the end of this unit, you will be able to:

- Understand the various category of reports proposed by the authority/other internal affairs.
- Arrange and submit data in the detailed format to satisfy the demands.
- Answer positively to comments and changes in requirements.
- Constantly analyze the report to describe trending key points and other differences.
- Suggest information in an easy way to explain formats, that is satisfactory for the organization.

3.1.1 Introduction to MIS

Management Information Systems (MIS), referred to as Information Management and Systems, is the discipline covering the application of people, technologies, and procedures collectively called information systems, to solving business problems. "MIS' is an organized system of gathering, storing and distributing the data in the form of information required to execute the functions of management. "Academically, the term is generally used to specify to the group of information management system tied to the automation or assistance of human decision making, e.g. Expert Systems, Decision Support System and Executive Information Systems.

1. Management

Management is art of getting things done through and with the people in formally organized groups. The basic functions performed by a manager in an organization are: Planning, controlling, staffing, organizing, and directing.

2. Information

Information is considered as valuable component of an organization. Information is data that is processed and is presented in a form which assists decision maker.

3. System

A system is defined as a set of elements which are joined together to achieve a common objective. The elements are interrelated and interdependent. Thus every system is said to be composed of subsystems. A system has one or multiple inputs, these inputs are processed through a transformation process to convert these input(s) to output.

Objectives of MIS

- MIS collect data from multiple internal and external sources of organization. Data collecting may be manual or through computer device.
- The collected data is processed to modify into useful information. Processing of data is completed by such activities as calculating, arranging, categorizing, and summarizing.
- MIS stores the processed or unprocessed data for subsequent usage. If any information is not urgently needed, it is stored as an organization record, for future use.
- MIS fetches information from its stores as and when needed by different users.
- Information, which is a finalized product of MIS, is distributed to the users in the organization. It is periodic or online through computer terminal.

The importance of the MIS in a company can be correlates to the importance of heart in the body. The information is the blood and MIS is the heart. In the body, the function of heart is supplying pure blood to all the parts of the body including the brain. The heart works faster and supplies more blood when required. It regulates and controls the incoming impure blood, processes it and circulate it to the destination in the amount required. It fulfills the demand of blood supply to human body in regular condition and also in emergency. The function of MIS is exactly the same in the organization.

- The system assures that a relevant data is collected from the multiple resources, processed, and sent further to all the required destinations. The system is expected to fulfill the information requirements of a person, a group of person, the management executives: the managers and the top management.
- The MIS satisfies the various requirements through a variety of systems such as Query Systems, Analysis Systems, Modeling Systems and Decision Support Systems the MIS assist in Strategic Planning, Management Control, Operational Control and Transaction Processing.
- The MIS support the accounting staff in the transaction processing and resolving their issues on the data related to the transaction, the status of a specific record and references on a variety of documents. The MIS assist the junior management employees by maintaining the operational data for planning, organizing and regulate, and guides them further in decision making at the operational level to correct an out of control situation.
- The MIS supports the middle management in short them planning, goal setting and regulating the business functions. It is maintained by the use of the management tools of planning and regulations. The MIS supports the top management in target setting, strategic planning and developing the business policies and their utilization.
- The MIS plays the role of information production, communication, problem recognition and assist in the procedure of decision making. For that reason, the MIS plays a crucial role in the management, regulation and operations of an organization.

To facilitate the management decision making at all levels of company, the MIS must be integrated. MIS units are companywide. MIS is accessible for the Top management. The top management of organization should play a dynamic role in designing, customizing and maintenance of the whole organization vast management information system. Information system and Information technology have evolved an essential element of any successful business and are considered as major functional fields just like any other functional field of a business management like marketing, finance, production and HR. Thus it is necessary to understand the area of information system just like any other functional area in the business. MIS is important because all businesses have a demand for information about the projects which are to be executed. Information and technology is used as a tool to deal with issues and giving opportunities for increasing production and quality. Information has always been valuable but it has never been so accessible, so latest and so amazing. Efforts have been made for gathering and recovery of information. However, challenges persist in the choice evaluation and analysis of the information that will make better in decision making and productivity.

MIS for a Business Organization

- Consider inputs as a demand from the clients and outputs as supply to the clients. Maintain existing operations and use the system to affects further methods of working.
- MIS helps progression of a business organization by providing proper information, maintenance and improvement which maintains flexibility in the operation of a business organization.
- MIS supports the decision making by staff members in their daily operations. MIS also encourages managers in decision making to achieve the targets and objectives of the company. Various analytical designs and IT tools are used for the plan developing strategies to fulfill competitive demands.
- Today each business is performing in a competitive market. MIS helps the organization to develop relevant strategies for the business to survive in a competitive environment.

3.1.2 Data Compilation in MS Excel

Most data sets require preparation before analysis. Garbage in, garbage out — your evaluation will only produce significant results if your data has rich quality. Especially when dealing with small or medium-size data collections, incorrect entries and uncertain values can have an excellent effect on your analysis — they will introduce bias. The data arrangement procedure can involve various tasks, depending on the form of data you evaluate.

What should you pay attention to when obtaining your data prepared for analysis? And how can you execute these processes effectively in Microsoft Excel? Expecting that you already gathered your data, you should go through the few stages of data formation. Our program instructs you through the data formation procedure. The complete descriptions below provide you with some ideas on how to apply these data cleaning works in Excel. We identify how Prep Jet supports you with these processes. However, we always explain how to work with “pure” Excel services.

1. Import data

Split data along delimiters

When you import your data, you should be aware of a clear delimitation of your entries. IT systems generally describe a delimiter such as a semicolon or a comma. In Microsoft Excel, we suggest to use the import command to obtain your data into a horizontal shape, also if you import a csv and not a txt file. Correlate to commonly opening the csv file, the import command has the benefit that you can represent the character encrypting. Our animation represents you how to use the import command. If you want a more advanced delimitation of your columns, you can use Prep Jet’s “Separate Cell Content” command. It allows you to describe the position of the delimiters.

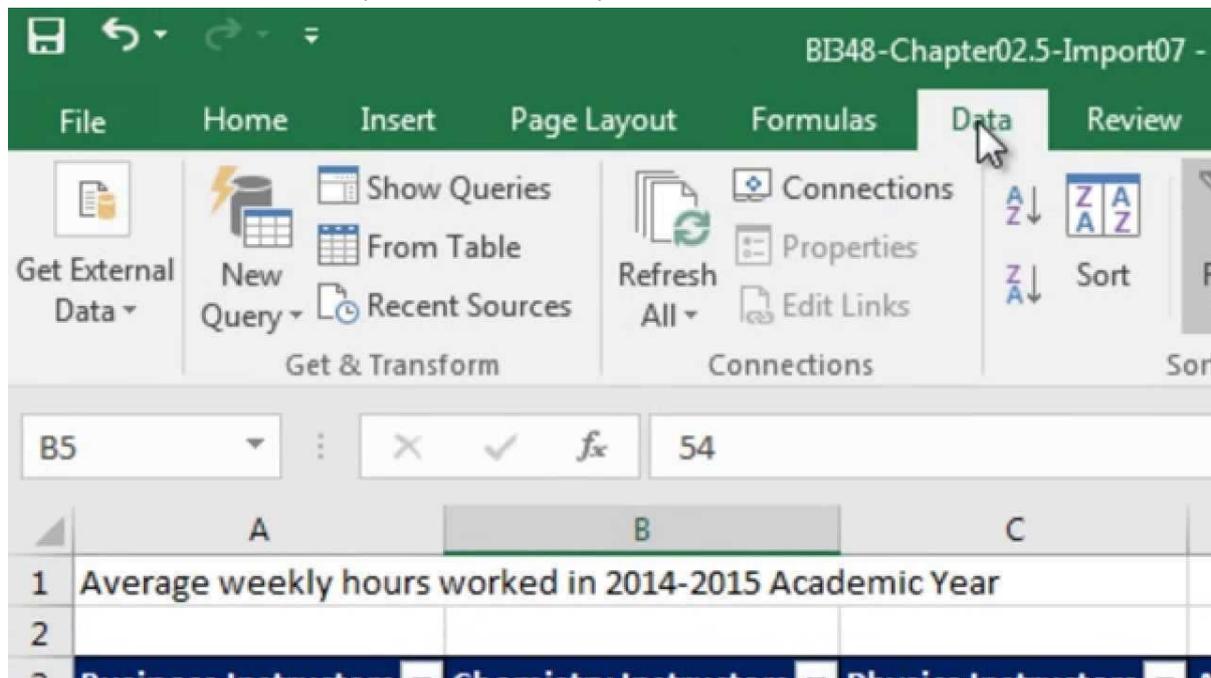


Figure 3.1.1 Split Data Along Delimiters

Extract parts from data entries

In case your import did not work well or you need only a part of a certain attribute (such as a part from a nested ID), you have to execute more sophisticated split operations. For example, if you want to extract the domains of email addresses, you have to separate the part between the @ and the last dot. If you use standard Excel commands, LEFT, RIGHT will support you to extract text parts. With FIND, you can define the delimiters (in our condition "@" and "."), with LEN, you can specify the length of the character series you want to extract. You will have to work around with a few sequences to definitely obtain the domain. If you don't want to note long formulas, you can use Prep Jet's Extract Text command. It allows you to separate text parts from a column in a few clicks.

```
=LEFT(RIGHT(E2;LEN(E2)-FIND("@";E2));FIND(".",RIGHT(E2;LEN(E2)-FIND("@";E2))-1)
```

E	F	G	H	I
email	domain			
jbaker0@symantec.com	symantec			
cweaver1@ebay.co.uk	ebay			
tbaker2@wikipedia.org	wikipedia			
jgarza3@boston.com	boston			
swright4@netlog.com	netlog			
rhanson5@angelfire.com	angelfire			
pgordon6@whitehouse.gov	whitehouse			
abrooks7@biblegateway.com	biblegateway			
vstanley8@craigslist.org	craigslist			
gwatkins9@instagram.com	instagram			
cgranta@mediafire.com	mediafire			
wgriffinb@alexa.com	alexa			
asimsc@oakley.com	oakley			
bfernandezd@addthis.com	addthis			
kportere@toplist.cz	toplist			

Figure 3.1 2 Extract Parts from Data Entries

Remove leading and trailing spaces

System exports or web-scraped data often cause unwanted leading and trailing spaces. You can delete these spaces by using the Excel TRIM command (do not use find and replace as this will also delete spaces between words). The syntax is as follows:

```
=TRIM(text)
```

If you do not want to repeat this action for every single column, you can use Prep Jet's Trim Spaces command which allows you to trim your entire sheet in a single click.

2. Format adjustments

Standardize formats

Before associating and determining data, it is important to coordinate the formats of your data. If your data comes from multiple countries or IT systems with multiple languages, you should be assured to have regular decimal separators (comma vs. dot). The same applicable for date formats (e.g. DD.MM. YYYY vs. MM/DD/YYYY) currencies (e.g. EUR vs. USD) or measurement units (e.g. miles vs. kilometres). In Excel, the best solution is to convert data collections with multiple formats into one standard before joining them. For date types, you can use Excel's "Number" command. Click on the lower right arrow to specify a custom format. If you want to unite the spelling of your data entries (e.g. UPPERCASE vs. Normal Case), you can use Prep Jet's Change Case function.

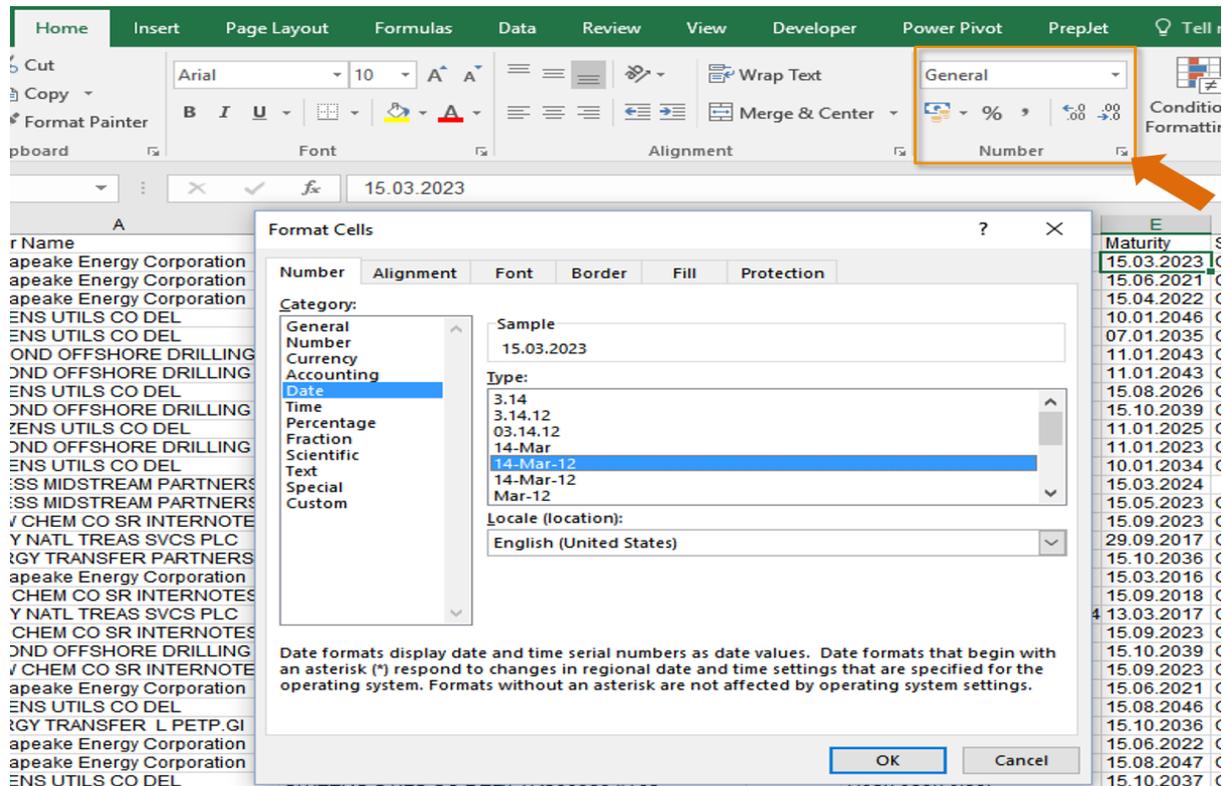


Figure 3.1 3 Standardize Formats

Store data in the correct format

To make sure that your data is identified appropriately, you should store it in the correct format. For example, your data might contain a numerical Identifier which has however no numerical meaning. Notify Excel that this is not a number by categorizing it as text. Excel assist you to define the date format in the Home ribbon in the section "Number" (see above). To execute a final analysis on the format of your data, you can use Prep Jet's Find Inconsistencies command which displays incompatible data types automatically.

Replace unrecognized or corrupted characters

In case your import decline for some reason, some characters might be corrupted after an export as the encrypting of characters might vary between IT systems. Characters like “ÃŸ” might introduce issues if you want to work with your data. We suggest to repair them using the find and replace command.

Check for truncated entries

When exporting data from IT systems, a lot of disturbing incidents can occur. One of them is truncations, i.e. data entries are cut off at a definite position. Some manual scanning should immediately introduce you to cautious data. How to fix it? The best solution is possibly to demand a recent and active export.

3. Correct inconsistencies

Check for inconsistent entries using custom rules

The most relevant resource when organizing data for analysis is your own knowledge about the data. With custom rules (so-called Business Rules), you can identify incorrect data. The entire procedure follows the rules of Boolean logic. You can define simple conditions. Before implementing any principles to your data, it is always beneficial to spell them in common language, e.g.: “The entries in column ‘Age’ regularly have to be greater or equal zero.”

Prep Jet has a service that supports you to apply custom confirmation rules simply without a lot of installed formulas and additional confirmation columns. You can also apply confirmation rules in Excel using the IF function. You will have an additional confirmation column that specifies whether the rule is implemented or not (this is also the column into which you write your formula). Here, we want the output in our confirmation column to be “ok” if the Age is greater or equal zero and we want to have “error” if the Age is smaller than zero (expecting that column F consists of Age):

```
=IF(F2>=0; “ok”; “error”)
```

You can also apply more complicated conditions. For example, if you want to identify your product range, you could implement the rule “The shipping weight of an item of the category pants is always smaller than 2kg.” To make the implementation in Excel simple, it is beneficial to phrase the condition similar to logical language first:

```
IF “category” EQUAL TO “pants” THEN “shipping weight” SMALLER THAN “2”
```

In Excel, we have an another confirmation column that specifies whether our rule is violated (“error”) or not (“ok”).

To be processed for Excel’s syntax, we have to rephrase the logical presentation as follows:

```
IF “category” EQUAL TO “pants” AND “shipping weight” SMALLER THAN “2” THEN “ok” ELSE “error”
```

Recognizing that column B contains category and column C contains shipping weight, we insert the

following formula into the confirmation column and drag it down to the end of our table:

```
=IF(AND(B2="pants"; C2<2); "ok"; "error")
```

You can still go further and organize conditions with more nesting's, conditions that have to be satisfied additionally (using the AND command) or conditions that can be satisfied selectively (using the OR command). Further, you can make your living a little comfortable using Prep Jet's Rule-based Validation command.

Numerical data: Check for outliers

If you work with analytical data, you should examine your data for outliers. Outliers are values that diverge from the recognized classification of your data. As analytical outlier identification is slightly complex to be applied in Excel, we suggest to sort the values by size and to check if there are any unusual entries at the upper or lower limits of your range.

Categorical data: Check for wrong categories

If you examine categorical data, it is necessary to make sure that there are no multiple rules for appointing categories. For example, if you want to identify your product portfolio, make sure that identical products are not put into separate categories (e.g. if you work with a grocery store, all apples, bananas and mangos might be classified as "fruits" while someone accidentally identified pineapple as "exotic fruit". There are various techniques to identify those kind of miscategorizations in Excel. If you have a small number of categories, you can easily insert a purifier and manually examine all available categories. If you have a larger range of categories, it is more recommendable to put the frequency of development in each category (e.g. with a bar chart in Excel). You can target on categories with low frequencies of development. Here in our example chart, in a few cases "blu" has been entered instead of "blue". You can easily fix this by using Find and Replace.

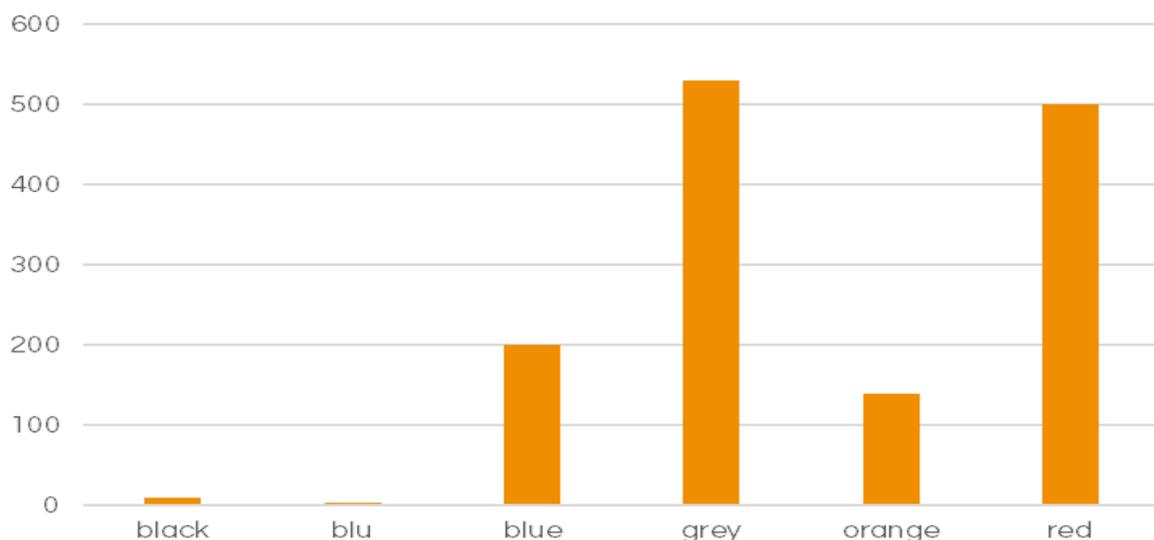


Figure 3.1 4 Check for wrong Categories

Missing entries: Add data or remove rows

Missing values are an issue that is hard to fix. If you have the possibility to get the authentic data without irrelevant efforts, the best solution is to add it. Alternatively, you might want to forget the rows that include empty cells when functioning specific analyses. A more advanced option is to attribute the data (e.g. by the mean or median or by a logistic regression). This is only advisable for individuals with advanced analytical knowledge as it might bias your results.

Survey data: Detect suspicious response patterns

When examining survey data, you should be conscious of response patterns that are not valid (e.g. because the respondent commonly was too fatigued to answer all your questions properly.). This might be for example an individual who always selects the answer in the same position for each question — so-called straight-lining (e.g. always the most left option). More visionary respondents also design alternating patterns when responding surveys (so-called “Christmas tree behaviour”). If you use an online survey tool, as a first step you can try to recognize those answers that have been filled in very short time by noticing at the response timers. Most online survey tools will export the time the respondents take to fill in the form with your survey data. In a second step, you can recognize cautious data by scanning the responses in Excel. This will be simple once you translated categorical text responses into numbers (e.g. “I fully agree” = 1, “I agree” = 2 etc.).

4. Remove duplicates**DE duplicate your data considering fuzzy duplicates**

Another necessary step before you associate and identify data collections is to remove identical entries. This is simple if you only want to find perfect identical. You can quickly delete them with Excel’s Remove Duplicates command in the Data Ribbon. If you first want to analyse the identical entries to identify where they come from, you can display and sort them with Prep Jet’s Detect Duplicates command.

Frequently, however, actual identical are not perfectly equal. They might dissimilar slightly due to typos or multiple naming rules. To identify these kind of identical, you either need an advanced fuzzy matching algorithm or a manual workaround. One manual solution can be to involve only a few features into your duplicate scanning. For example, if you want to find duplicates in a client list and names might have been spelled differently, you can in a different step only have a look at the address fields. It should also assist to classify categorical data first before analysing for duplicates.

5. Combine data sets**Lookup data from other tables**

If you do not only want to recognize a single data collection, the final step to obtain your data prepared for analysis is to join it. You could easily copy columns from one sheet to another if your data is arranged. However, this is not advisable as you risk to copy the incorrect data in case one data set misses a row. It is better to recognize match criteria and pull your data based on these criteria from one table into another. If you have one match criterion that is different for each row of your data set.

Exercise



1. What is MIS? Explain the objectives of MIS for an organization.

2. Explain the process of Data Entry in Microsoft Excel.

3. How can you check inconsistent entries using custom rules?

4. How can you analyze wrong entries entered in organization's data?

5. How can you extract a particular data from data entries?

4. Assistance in Payment Collection



Unit 4.1 – Payment Processing and Collection Methods



MES/ N 0217

Key Learning Outcomes



At the end of this module, you will be able to:

- Create and manage reports on billings and collections.
- Give assistance to the sales team representatives in collections by arranging and dispatching reminders and report to customers and agencies.
- Understand contents (stocks sold, consumer, etc.) from the sales contracts.
- Analyze traffic orders based upon ROs collected from consumers/agencies where applicable.
- Answer positively to feedback and development in specification.

UNIT 4.1: Payment Processing and Collection Methods

Unit Objectives



At the end of this unit, you will be able to:

- Create and manage reports on billings and collections.
- Give assistance to the sales team representatives in collections by arranging and dispatching reminders and report to customers and agencies.
- Understand contents (stocks sold, consumer, etc.) from the sales contracts.
- Analyze traffic orders based upon ROs collected from consumers/agencies where applicable.
- Answer positively to feedback and development in specification.

4.1.1 Payment Collection Procedure

Sales Coordinators are generally a customer's first point of contact. Sales Coordinators regularly visit clients to introduce products or services and they frequently manage the inquiries to make sure clients are satisfied. As a result, at most organization's it's the Sales Coordinators that have a close working relationship with the clients. The Sales Coordinators necessarily becomes the face of the company – so who better to discuss unpaid invoices.



Figure 4.1 1 Sales Coordinator discussing about Payment Collection Procedure

This close working connection with the client can also represent that he or she knows the right person or management to contact when it comes to clearing up an unpaid payment. The best individual may not be in Accounts Payable, it could be the office manager or the proprietor. Maintaining the private relationships and potential awareness of faithfulness can be an effective force. The client may be more compelled to pay, if it's the Sales Coordinator asking. Also, the client may feel more satisfying opening up to their Sales Coordinator about their position and the components delaying payment.

If the sales force is assigned with collecting payments, they will require to know the credit risk of each client. This would require regularly providing sales with a monthly summary of aging invoices. This also assist sales coordinators understand the overall credit risk and account status of the clients. A trustworthy Sales Coordinator will come to understand that a sale is not really a sale until the company is paid.

The collections agents may deal with a huge number of unpaid invoices. If so, the collection manager requires a process for dealing with clients in a standard manner to deal with payment issues.

The comprehensive collection process is listed below. The process flow noted here only describe the stages of communication with a client. These steps might be rearranged, build up, or eliminated, depending on the payment status of each invoice. The steps are:

- When an invoice becomes overdue for payment, refer it to a collections assistant for collection activities.
- A client may deposit a form specifying a deduction request under the company's marketing policy. If so, validate the request with the marketing manager and match it against deductions taken by the client. If a deduction can be tracked to the approved deduction, deposit a credit memo approval form to balance the amount of the deduction.
- Use the auditing software to print invoice letters at fixed intervals, with each one identifying overdue invoices to clients. Analyze the letters and obtain any for which other collection activities are already in progress. Mail the other invoice letters to clients.
- If there are still overdue invoices pending, call clients to explain the reasons for lack of payment. Following each call, record the analysis of the call, involving the date, person contacted, reasons given for late payment, and guarantee to pay.
- If it is important to receive a longer payment period, document the conditions of the payments to be made, as well as any interest to be paid and any particular agreement of payment.
- At this stage, the collections agents should have sufficient information about the financial condition of a client to suggest to the credit staff if a deduction or completion of a client's credit limit is in order. The credit staff is in charge for modifying a credit limit – the collections staff only gives information.

- If there are specific payment methods, correlate due payment dates to the dates on which payments are literally accepted, and contact clients as soon as it seems that they will miss a due payment date. This level of auditing is needed to keep clients from delaying their payments.
- Once all other in-house collection methods have been tried, shift invoices to a collection agency. At this stage, the client should absolutely be settled on a credit hold list.
- If all other alternatives have failed, contact with the company's legal staff members to conclude whether the company has an adequate case against a client to win a judgment against it in court. Also, the client should have adequate property available to pay any judgment against it. If these issues seem favorable, then permit the legal staff members to continue with a lawsuit.
- If all collection methods or techniques have failed, complete a credit memo approval form in the amount of the invoice(s) to be written off.
- If there was a specific problem with the company's systems that caused a bad debt to occur, arrange a meeting of those people most closely related to the problem to discuss a solution. Assign responsibility for action items, document the meeting, and schedule follow-up meetings as necessary.

4.1.2 Payment Collection Method

There is nothing more important to the success of your business than your system for managing accounts receivable, billing, and collections. Sometimes this system is known as a "Collections Management System;" anything it is called, you need to organize it and work it carefully.

If you have many clients, but no payment from these clients, you will go away from business. Here is a list of steps you will require to take to apply a collections management system for your business:

Establish Payment Methods

How will people pay you? This depends generally on the model of business and whether your clients are individuals or organizations or both. There are some organized ways to take in payment from clients of all types: The more distinct types of payments you received, the more beneficial it will be for clients. But you will have to pay a premium for managing some types of payments, such as credit and debit cards.

- Cash payments, primarily from individuals in a retail business



Figure 4.1 2 Cash Payment

- Cheque, from individuals in a retail environment and business customers



Figure 4.1 3 Payment by Cheque

- Credit and debit card payments from individuals and businesses



Figure 4.1 4 Payment by Debit or Credit Cards

- Online payment methods such as PayPal, from individuals and companies.



Figure 4.1 5 Online Payment

- Credit or payment methods, from both individuals and business clients.
- Other extrinsic payment sources, such as insurance companies, in definite types of companies.

Set Up Payment Processing "Rules of Thumb"

After you have decided what types of payments to accept, you will require to organize some rules for your employees regarding the approval and management of these payment types.

For example, what are your rules and regulations for receiving Cheque? Do you do credit Cheque on new clients? When do you allow clients to pay over time? When do you take a client to small claims court?

Send out Bills

Send out bills to clients who pay you money. Send an invoice at least once a month, or more frequently if you are really serious about receiving payments.

Run an Accounts Receivable Aging Report

Depending on your model of business, you may have clients who do not pay when buying, or who are paying over time. Operating an accounts acceptable declining report will show you when to send out bills and when to introduce powerful collection techniques.

Initiate Collections Proceedings for Non-payers

For clients who do not pay within a moderate period of time (as concluded by your "rules of thumb,") introduce collections procedure. You may need to send an account to a collections agency or to small claims court. Determine which is best for each type of account.

Building up and working a collections management system can support you collect the payment that you are scheduled and maintain cash flowing through your organization.

Exercise

1. What is the role of Sales Coordinator in Collecting Payments?

2. Discuss the process of payment collection.

3. From how many methods payment can be collected?

4. What is the most popular mode of online payment in India?



5. Health & Safety Comply with Workplace



Unit 5.1 – Safety, Health, and Hygiene

Unit 5.2 – First Aid



MES/ N 0104

Key Learning Outcomes



At the end of this module, you will be able to:

1. Observing and understand the current health, safety, security policies and procedure of organization.
2. Understand the safe working practices pertaining to own occupation.
3. Understand the government rules and policies related to the health and safety including emergency procedures for accidents, illness, fires or others.
4. Identifying the person responsible for health and safety in the working area, including those persons whom to contact in emergency.
5. Identifying the security signals in the workplace fire alarms, staircases, fire warden stations, first aid and medical rooms.
6. Identifying the possible work hazards in the working area which can cause risk to others health and safety.
7. Ensuring own and others health and safety in the workplace through precautionary measures.
8. Identify and recommend the basic terms and opportunities to the designated person of your workplace for improving health, safety, and security.
9. Identify and correct the cause of accidents, illness, and fires in your working area and within the limits of individual's authority.

UNIT 5.1: Maintain Workplace Health and Safety

Unit Objectives



At the end of this unit, you will be able to:

1. Observing and understand the current health, safety, security policies and procedure of organization.
2. Ensuring own and others health and safety in the workplace through precautionary measures.
3. Identify and recommend the basic terms and opportunities to the designated person of your workplace for improving health, safety, and security.

5.1.1 Introduction:

Emergency evacuation is needed when staying within the building not safe anymore. Every organization has an evacuation procedure. Every organization has a safe place within the organization compound or outside the organization compound where all employees are expected to assemble in case of an emergency evacuation. The team leader guides the team and takes them to safe place. It is very important in these cases, to assemble at the safe area immediately.

If you do not reach the safe area on time, the team leader who is responsible for your safety will send someone to look for you. This will put the other person's life in danger.

Conditions for Evacuation

Emergencies which require immediate evacuation includes:

- Explosions
- Fires
- Earthquakes
- Hurricanes
- Floods
- Workplace violence
- Toxic material releases
- Tornadoes
- Civil disturbances

Every company has:

- **An evacuation policy.** All the TLs are responsible for informing their employees about it. When the TL is informing you about these details, pay attention. This negligence could cost lives.
- **A designated place for emergencies.** Ensure that you know where it is.
- **A “buddy system” for individuals with special needs or disabilities.** If you are a buddy to someone, ensure that your buddy is safely out of the premises with you.

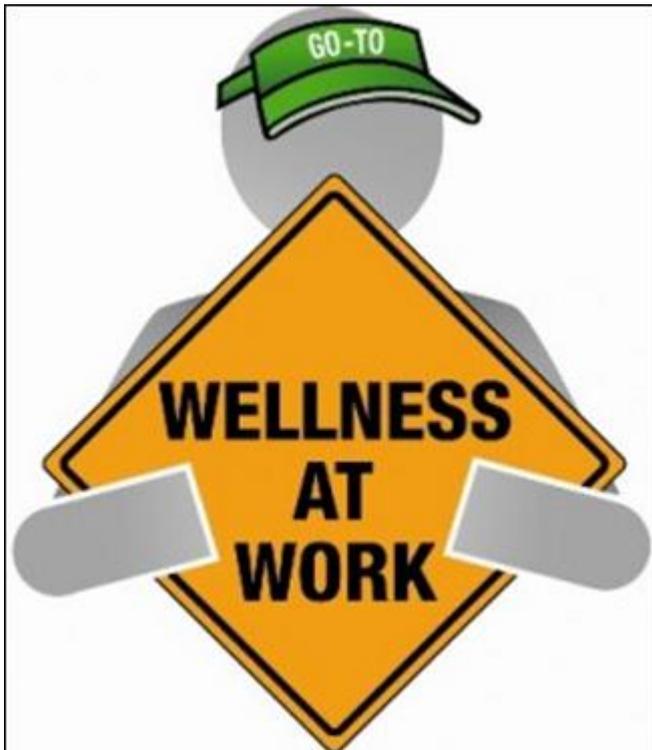


Figure 5.1.1 Conditions for evacuation

- **Floor plans with evacuation routes in work areas.** Ensure that you understand it so that you can use it in time of need.
- **Assembly areas.** These are the areas where you are required to assemble after evacuation.
- **Periodic evacuation drills.** Ensure that you pay attention during those drills. You need to save your life and you can be helpful in saving someone else’s life too.

5.1.2 Mock Drills/ Evacuations

The responsibility of the safety of the workers in case of emergency is on the fire safety and evacuation workers. These workers need to go through the training to know the duties and responsibilities. In a workplace, the practice drill should be done in every 3 months under simulated fire conditions so that the workers know the techniques of saving their and other life. By practicing in the fire drills, all the worker's area able to know the lifesaving method required in case of emergency.

Fare the exercises designed check the staff response as per emergency. It is also a test of the emergency staff, working staff and other members of fire safety department. Sometime the drill is not successful but that's okay because human learn from previous mistakes. But it is important for all the members that they correct their mistake on time. Sometime all the mistakes were not done by the members of staff, the mistake is done the faulty equipment and safety plans. But, there is a need of staff training periodically.



Figure 5.1.2 Mock Drills

There are two vital components for preparing the fire safety plan which are written below:

1. An emergency action plan, which tells the procedure to be optimize in case of emergency.
2. A fire prevention plan, which tells the methods to be optimize to cool the fire as soon as possible.

You need to participate in arranged by organization for your personal safety and also for others safety. These drills help you in understanding the Fire safety and evacuation plans sketch staff duties and accountabilities in time of emergency. Continuing training is required to help safeguard that the employees are conscious of those duties and responsibilities. Firefighting trainings serve as a prospect for staff members to validate, under replicated fire conditions, that they can perform those duties and responsibilities safely and efficiently. It's also a time for the workers or employee to demonstrate about the defend-in-place strategies and also the workers are able to take advantage of facility's fire protection features and exit facilities to protect the people in their care.

Fare excellent exercise designed to evaluate staff response to a replicated emergency. The fare is also a test of facility's fire safety/evacuation strategies and staff training programs. It is not essential that all run smoothly. That's okay, so long as staff and the organization understand from them and correct mistakes made. It's vital, therefore, that there be an analysis of each drill so that any problems met can be addressed. Perhaps the problems are due to unfinished or outdated fire safety/emigration plans. Perhaps there's a need for further training of staff.

The two essential components of a fire preparedness plan are the following:

1. An emergency action plan, which details what to do when a fire occurs.
2. A fire prevention plan, which describes what to do to prevent a fire from occurring.

5.1.3 Medical Emergencies

Everyone plans for emergencies. That is the reason why we keep a first aid kit with ourselves. At work, however one is exposed to a lot of stress and physical activity. This could lead to certain medical emergencies. It's better to be prepared with the first aid measures and knowledge of implementing them on ourselves and on others. This module equips you with that information. Pay attention to these medical emergency procedures to understand how to conduct you in theses crucial movements. Pay attention during these sessions. You might be able to save your own and your friend lives.

5.1.3.1 In case of Medical Emergency

A medical emergency is a situation in which a worker met in accident and needs medical help. The medical injury may be severe or life threatening. Some situation where:

- Person is not inhaling
- Heart attack or stock
- Heavy or severe bleeding
- Electric Shock
- In case of Poisoning
- Person get somebody Burns

In case of medical emergency, the person or victim requires the immediate help. Sometime the person need attention before the you call the emergency helpline.

It is important to know or remember the number of emergency helpline or Emergency Medical Service (EMS) for the safety of self and other workers.

DON'T

- Let the victim to eat or drink anything.
- Confine the victim
- splash any fluid on victim face or on injury.
- shift the victim to another area or place unless it is the only way to protect the victim.

Bleeding

- Apply any type of pressure on the wound of victim with the help of bandage or any other means.
- Elevate the wound to slow the bleeding.
- When necessary, apply the pressure on pressure points near wound to block excess bleeding.

Fainting

- Fainting is a loss of consciousness which is due to temporary reduction flow of blood in the victim's brain.
- The unconsciousness of the victim may lead to more injury in the workplace.
- Slow pulse of the victim.
- The pale, cold skin and sweating of the victim.

Causes of fainting:

- Eating or drinking lack of fluids which is also known as dehydration.
- The low blood pressure of victim.
- Due to lack of sleep.
- Over exhaustion of the worker

First Aid for Fainting:

- Lie down the victim on the back and raise the legs above his heart level.
- Ensure the clearance of victim's nose.
- Check for indication of coughing, or breathing problem.
- Loose the tight cloths like neck ties, collars, and belts.
- If the victim remains unconscious from the 1 minute, call the EMS as soon as possible.

Shock

The shock occurs in the human body on the failure of circulatory system. When insufficient amount of oxygen is reached in the body tissue, the shocks also occur. This condition is treated as soon as possible if not, it may lead to organ failure, and may cause death. Shock becomes worse by fear and pain of victim.

First Aid for shock:

- If possible, keep the victims in lying down position.
- Raise the legs 10-12 inches from the ground level unless you suspect an injury in back and bone.
- If the victim is feeling cold, then cover him. If the victim is feeling hot, then don't make suffocation by covering him.
- If the victim starts vomiting, then move the victim to the suitable place.
- Loosen the tight clothing.

Muscle Cramps

- Stretch out the affected muscle of the victim to counterbalance the cramp part of the body.
- Firmly massage the cramped muscle.
- Apply some kind of moist heat on the affected area.
- If the cramp remains in the muscle, get medical help as soon as possible.
- Rest- avoids movements and activities that cause pain.
- Apply the ice on the cramped muscle it may reduce the pain and swelling of the muscle.
- Applying the light compression like elastic bandage on the affected area may reduce the swelling.
- Raising the affected area above the heart level may reduce the swelling as well as pain.

Fractures

As we all know about the fracture that is the crack or break in the bone.

Dislocation

A dislocation occurs when the bone slips out from the specified location. It generally occurs in the shoulders, thumb, elbow, fingers, lower jaw and other movable joints.

First Aid for Dislocations & Fractures:

- Immobilize the effected part.
- Stabilize the effected part
- Use a cloth as a sling.
- Use board as a sling.

5.1.4 First Aid

First aid is the assistance given to any person suffering a sudden illness or injury with care provided to preserve life, prevent the condition from worsening, or promote recovery.

Kits vary in contents but most kits have the following items:

- Band-Aids / Adhesive bandages
- Gauze pads and tape
- Scissors, cold pack
- Wound bandage / compress
- Eye pads / eye wash solution

- First aid / burn cream
- Antibiotic ointment
- Face shield or barrier mask for providing CPR
- Forceps / tweezers
- Disposable thermometers
- First aid instruction booklet

5.1.5 Personal Protective Equipment's (PPE)

Personal protective equipment (PPE) refers to protective clothing, helmets, goggles, or other garments or equipment designed to protect the wearer's body from injury or infection. The safety by protective equipment includes electrical, heat, physical, biohazards, chemicals, and airborne particulate matter.



Figure 5.1.3 Personal Protective Equipment's

In the workplace, there are many situations which require immediate first aid to the victim and many countries have made some regulation, legislation, and guidance which specify the minimum level of first aid to be given to the victim. For this, the worker needs the special training and area for achieving the immediate first aid. Go achieve this, the training should be given by specialist first aid officer and necessary training given by learning institute. The training of first aid does not need any type of specific tools and equipment but may involve the improvisation with material offered at the time of training.

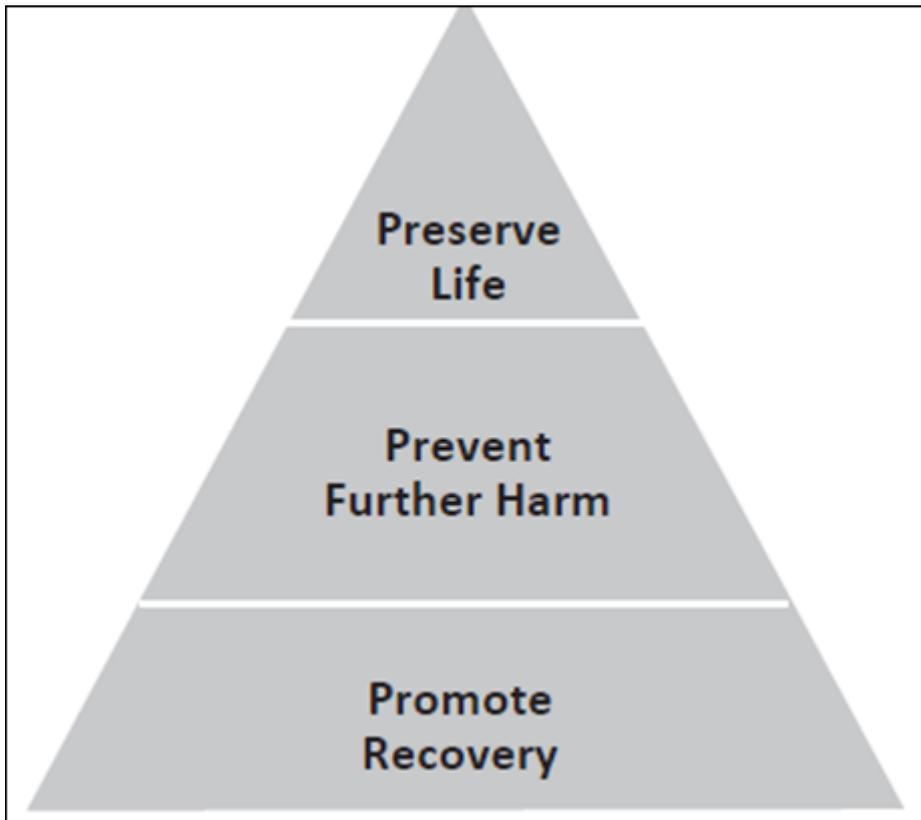


Figure 5.1.4 First Aid pyramid

While delivering First Aid always remember:

- To prevent from degradation.
- Act deliberately and confidently with the victim.
- The timings of Golden Hour should be first 60 minutes from an accident.
- The timings of Platinum Period should be first 15 minutes following an accident.
- Prevent the body shock and choking.
- Stop bleeding from the wound.
- Loosen the clothes of victim.
- Regulate the respiratory system of the victim.
- Avoid crowding near the victim.
- Take the victim to safe place or hospital near the workplace.
- Attend the emergencies situation with ease and without fear.
- Always remember to not overdo. Because the person giving the first aid is not doctor.

Exercise



1. Discuss some general safety rules for working in the workshop.

2. What is PPE and are the common components of PPE?

3. What is an accident and what are the types of accidents?

4. Discuss the types of fire-extinguisher and their uses?

5. Write a short note on health and hygiene?

6. What are the common components of First-Aid kit?

7. What are the symptoms of shock and what should be the first-aid?

8. What are the symptoms of heat exhaustion and what should be the first-aid?
