



## **FRANCHISE MANAGEMENT MODULE**

### **Introduction:-**

A franchise is a type of business that is operated by an individual(s) known as a franchisee using the trademark, branding and business model of a franchisor. In this business model, there is legal and commercial relationship between the owner of the company (the franchisor) and the individual (the franchisee). In other words, the franchisee is licensed to use the franchisor's trade name and operating systems. In exchange for the rights to use the franchisor's business model to sell the product or service and be provided with training, support and operational instructions the franchisee pays a franchisee fee (known as a royalty) to the franchisor. The franchisee must also sign a contract (franchise agreement) agreeing to operate in accordance with the terms specified in the contract. A franchise essentially acts as an individual branch of the franchise company.

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## Franchise Module Overview (Proposed Layout)

<b>Login Type</b>	<b>Menu</b>	<b>Sub Menu/Screens</b>	<b>Description</b>
Front Office	Work Order	Patient Registration	Option to registered the sample for B2B client in system
		Payment mode	For B2B Client Payment mode will be credit
Accounts	Invoice	Invoice Creation	Option to create the invoice for B2B client
		Invoice Reprint	Option to print for Invoice
		Advanced payment	Option to make the credit amount for B2B client
		Payments Validation	Option to validate the payments by B2b Client
		Invoice cancel	Option to cancel the Invoice
		Ledger Status	Complete status of transections for Ledger
		Ledger Report	Option to have the Ledger report
	Report	Client Deposit Report	Summary report of Client wise deposit
	Excel Reports Details wise and Summery wise	All Excel Report section	



## **Steps**

**Login Screen:** A default Login screen will be display, where you can enter with your user ID and Password.





## **Welcome Screen:**

In this Screen, user can set default login, download user manual, check general notification, home button with plus sign show the hospital departments,



From this button, user can redirect the home button



From this button user can check the general notification like: Pending circular and approval.



From this button user can change the department, or login to different department.



From this button user can logout from the application



From this button user can Maximize the screen



From this button user can view the available menu on selected department.





## Patient Registration for B2B

In this step, you can register the new patient for B2B Clients (Registration not required for old patient) into the system.

Welcome: ITDOSE TEAM Centre: HEAD OFFICE Role: Front Office Centre: HEAD OFFICE Sample Tracker: Enter SIN No. Search

### New Registration

Centre : HEAD OFFICE	Patient Type : B2B	Rate Type : ISPL B2B ITDOSE	HomeCollection
Mobile No. : 9999956494	UHID :	PreBooking No. :	Membership Card
Patient Name : Mr. BOB	Age : 43 Months Days	DOB : 03-Feb-1978	Old Patient Search
Gender : Male	Referred Doctor : SELF New	Second Ref. : SELF New	
Address : 11111 saket	Locality : Saket S.O (South De	PinCode : 110017	
City : South Delhi	State : DELHI	Country : INDIA	Capture
Source : Referral	Dispatch Mode : Email	Email : asdf@yahoo.com	Printer Upload
ID Proof No. : Card No. 454545	FieldBoy : courier	Coll. Date Time : 03-Feb-2021 09:00 AM	Manual Upload
Visit Type : Home Collection <input type="checkbox"/> VIP	Clinical History : NA	Remarks : NA	
Other Ref. No. : NA			

By Name  By Code  InBetween  Count: 1

Code	Item	View Dos	MRP	Rate	Qty.	Disc.	Amt.	Delivery Date	IsUrgent	IsSelfColl.
DLBIALU001	ALUMINIUM		2400	2400		0	2400	03-Feb-2021 11:40 AM	<input type="checkbox"/>	<input type="checkbox"/>

Currency : INR 2400 INR Factor : 1 INR = 1 ₹ Gross Amount : 2400 Net Amount : 2400  
PaymentMode :  Credit Balance Amount : 2400 Currency Round : 0

Save Cancel



## Create New Invoice

This section allow toAccounts user to create the invoice against the Business comes from B2B clients directly. Wherein Client has been collect the sample at their palce and sent to main lab for the processing.

Welcome: ITDOSE TEAM Centre: HEAD OFFICE Role: Accounts Centre: HEAD OFFICE
Sample Tracker: Enter SIN No.1 Search

### Create New Invoice

HLM 
  PUP 
  CC 
  FC 
  B2B

From Date	: 01-Feb-2021	To Date	: 03-Feb-2021
Business Zone	: NORTH	State	: All
Client Name	: SHA001 ~ B2B SHAT, CBCA ~ CBCD, CR1 ~ CENT...		
Invoice Date	: 03-Feb-2021		

Search
Save
Cancel

**Search Result**

View	S.No.	Code	Client Name	Share Amt.
1	L2L	LAB TO LAB		238

S.No.	Reg. Date	Lab No.	Test Description	Patient Name	Age/Gender	Gross Amt.	Dis. Amt.	Net Amt.
1	03-Feb-2021	AAPK92	CBC + ESR	Mr. MUKESH	23 Y 1 M 5 D /M	238	0	238



## Invoice Reprint

Option to view the invoice details of B2B clients and also view the report and print the bill copy.

Welcome: ITDOSE TEAM
Sample Tracker:  [Search](#)

### Invoice Reprint

HLM 
  PUP 
  CC 
  FC 
  B2B

From Date : <input type="text" value="01-Feb-2021"/>	To Date : <input type="text" value="03-Feb-2021"/>
Invoice No. : <input type="text"/>	Date Type : <input type="text" value="Entry Date"/>
Business Zone : <input type="text" value="NORTH"/>	State : <input type="text" value="All"/>
Client Name : <input type="text" value="SHA001 ~ B2B SHAT, CBCA ~ CBCD, CR1 ~ CENT..."/>	
Client Name : <input type="text"/>	

[Search](#)
[Cancel](#)

Dispatch
NotDispatch

**Search Result**

S.No.	Invoice No.	Client Name	Invoice Date	Created By	Share Amt.	View Invoice	View Report
1	B2B/20-21/000008	LAB TO LAB	03-Feb-21	ITDOSE TEAM	238	<a href="#">View Invoice</a>	<a href="#">View Report</a>



**Bill of Supply**

<b>ItDose Lab</b> ItDose, D-159 <a href="http://www.abc.in">www.abc.in</a> GSTIN : Email : <a href="mailto:abc@google.com">abc@google.com</a> Phone : 0000000000		Invoice No B2B/20-21/000008 Date of Invoice 03-02-2021 Place of Supply : Delhi	
<b>Client Info :</b> L2L LAB TO LAB DELHI UTAM Nagar b block house No 22/f 14 first Email : Phone : GSTIN :			
<b>Sl</b>	<b>Particulars</b>	<b>SAC</b>	<b>Amount</b>
1	Testing Charges for pathology samples for the period : Form : 01-Feb-2021 To : 03-Feb-2021	999316	238.00
<b>Total</b>			<b>238.00</b>
Amount chargeable in words <b>Indian Rupees Two Hundred Thirty Eight Only.</b>			
<b>SAC</b>		<b>Amount</b>	
999316		238.00	
<b>Total</b>			<b>238.00</b>
<b>Account Summary</b>			
<b>Opening Balance</b>	<b>Invoice Amount</b>	<b>Collection Amount</b>	<b>Balance</b>
344.00	238.00	0.00	582.00
This is a computer generated Invoice and doesn't require a signature/stamp.			

**Payment Information**

Demand Draft/Cheque to be drawn in favour of '#####'  
 RTGS/NEFT Bank details:  
 Beneficiary Name - #####  
 Bank Account Number - #####  
 Bank Name - Indusind Bank Ltd.  
 IFSC Code of the Bank - #####  
 Branch Address - New Delhi - 110001

PAN : #####

This is a computer generated invoice, requires no signature. This Invoice will be considered correct if no errors are reported within 15 days of receipt of invoice. To assure proper credit to your account, please mention Client code and invoice no. on your remittance. For clarification regarding the Bill details, please contact [abc@gmail.com](mailto:abc@gmail.com), 0000000000

Registered office: Delhi, 110017, [www.abc.in](http://www.abc.in)





## Advance Payment

Option to have check the status of payments credit wise and Invoice roll wise for B2B clients

Welcome: ITDOSE TEAM Centre: HEAD OFFICE Role: Accounts Centre: HEAD OFFICE
Sample Tracker:  Search

**Advance Payment**  
 HLM  PUP  OCC  FC  B2B

**Advance Payment**

Client Name :  More Filter

Receive Date :  Advance Amount :

Type :  Deposit  Credit Note  Debit Note  Cheque Bounce

**Payment Detail**

Currency :  Payment Mode :  Factor : **1 INR = 1 ₹** Currency Round :

Payment Mode	Paid Amt.	Currency	Base
Cash	0	INR	0

Remarks :

Save

**Previous Advance Amount**

S.No.	Client Code	Client Name	Base Amount(INR)	Payment Mode	Card No.	Card Date	Pay Currency	Paid Amount	Conversion	Deposit By	Deposit Date	Entry Date	Remarks	Cancel Advance
1	L2L	LAB TO LAB	238	Cash			INR	238	1	ITDOSE TEAM	03-Feb-2021	03-Feb-2021 04:51 PM	Against the invoice no. 008	✖
2	L2L	LAB TO LAB	324	Mobile Wallet			INR	324	1	ITDOSE TEAM	12-Jan-2021	12-Jan-2021 01:29 PM	paymet dr. itdose	
3	L2L	LAB TO LAB	20	TDS			INR	20	1	ITDOSE TEAM	12-Jan-2021	12-Jan-2021 01:29 PM	paymet dr. itdose	
<b>Total :</b>			<b>582</b>											



## Pending Amount Validation

Option to have check and validate the payments for B2B client if any payments is pending with them.

Welcome: ITDOSE TEAM Centre: HEAD OFFICE Role: Accounts Centre: HEAD OFFICE
Sample Tracker:

**Pending Amount validation**

From Date :  To Date :  Client Name :  Payment Mode :

Status :  Date Type :

**Search Result**

S.No.	Type	Paid By	Paid Date	Client Name	Payment Mode	Pay Currency	Paid Amount	Conversion	Base Amount(INR)	Bank Name	Cheque No.	Cheque Date	Remarks	Edit	Accept	Cancel
1	Credit	ITDOSE TEAM	03-Feb-2021 04:51PM	LAB TO LAB	Cash	INR	238	1	238				Against the invoice no. 008			



## Invoice Cancel

Option to have the cancelled Invoice if In case any test not done or sample not processed in any conditions or for any correction need to be made by accounts department.

Welcome: ITDOSE TEAM Centre: HEAD OFFICE Role: Accounts Centre: HEAD OFFICE Sample Tracker: Enter SIN No. Search

### Invoice Cancel

From Date : 01-Feb-2021 To Date : 03-Feb-2021  
Business Zone : NORTH State : All  
Client Name : L2L ~ LAB TO LAB  
Invoice No. :  
Cancel Reason : Test Not Done

Search Invoice Cancel

#### Search Result

S.No.	Invoice No.	Client Name	Invoice Date	Created By	Invoice Amt.	
1	B2B/20-21/000008	L2L-LAB TO LAB	03-Feb-2021	ITDOSE TEAM	238	<input checked="" type="checkbox"/>



## Ledger Status As on Date

Option to have check the entry wise status in ledger and validate the same for Invoicing .

Navigation: Welcome: ITDOSE TEAM Centre: HEAD OFFICE Role: Accounts Centre: HEAD OFFICE Sample Tracker: Enter SIN No. Search

### Ledger Status As On Date Report

HLM  PUP  CC  FC  B2B

**Search Criteria**

Business Zone : NORTH State : All  
Client Name : L2L ~ LAB TO LAB  
Type : As On Date Client Name :  
As On Date : 03-Feb-2021 23:59:59

**Details**

S.No.	Code	Client Name	Zone	State	City	Contact No.	Date	Opening Balance
1	L2L	LAB TO LAB	Delhi	DELHI	North Delhi		03-Feb-2021 23:59:59	-1700



## Ledger Report

Option has to be get the report for B2B clients and for others also along with Summary and details wise.

Navigation: Welcome: ITDOSE TEAM Centre: HEAD OFFICE Role: Accounts Centre: HEAD OFFICE Sample Tracker: Enter SIN No. Search

### Ledger Report

HLM  PUP  CC  FC  B2B

**Search Criteria**

TagBusiness Lab	:	ATULAYA HEALTHCARE CHANDIGARH, HCG KR...	State	:	Select an Option
Business Zone	:	All			
Client Name	:	L2L ~ LAB TO LAB			
From Date	:	01-Feb-2021	To Date	:	03-Feb-2021
All	:	<input type="checkbox"/>	Client Name	:	

**Report Type**

Summary (Not More Than 6 Month)  Detail (Not More Than 31 Days)

[Report](#)





## B2B Ledger Report Summary wise in Excel

L2L ~ LAB TO LAB Ledger Report Summary				
From : 01-Feb-2021 To : 03-Feb-2021 (Print Date Time : 03-Feb-2021 05:02 PM)				
Month	Net	Deposit Amount	Closing	
OPENING			-648	
February-2021	238	238.00	-648	

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## Client Deposit Page and Report

Welcome: ITDOSE TEAM Centre: HEAD OFFICE Role: Accounts Centre: HEAD OFFICE Sample Tracker: Enter SIN No. Search

### Client Deposit Report

**Search Criteria**

Type :  All  Pending  Approve  Reject  
 Business Zone : NORTH  
 Client Name : SHA001 ~ B2B SHAT, CR1 ~ CENTER 1, CEN2 ~ CENTER2, L...  
 Date Type :  Deposit Date  Validate Date  
 From Date : 03-Feb-2021  
 All Client :

Centre Type : B2B  
 State : All  
 To Date : 03-Feb-2021  
 Client Name :

[Report](#)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1				<b>ClientDeposit Report</b>											
2				From : 03-Feb-2021 To : 03-Feb-2021 (Print Date Time : 03-Feb-2021 05:52 PM)											
3	ClientCode	ClientN	BaseAm	Payment	cardNo	CardDat	PayCurr	PaidAm	Convers	BankNa	EntryBy	Deposit	EntryDa	Status	Approve
4	L2L	LAB TO LA	238.00000	Cash		01-Jan-00	INR	238	1		ITDOSE TE	03-Feb-20	03-Feb-20	Approve	ITDOSE TE
5															

P	Q	R	S	T
ReceivedDa	Remarks	RejectR	IsCancel	CreditDe
03-Feb-2021	Against the invoice no. 008			0





**END**