Process context frame

Relevant files

enquiry-to-request-conversion-requirements.txt

Chat notes

Enquiry to Request Conversion Process

Enquiry to Request Conversion Process
Owner: Triveni Y.
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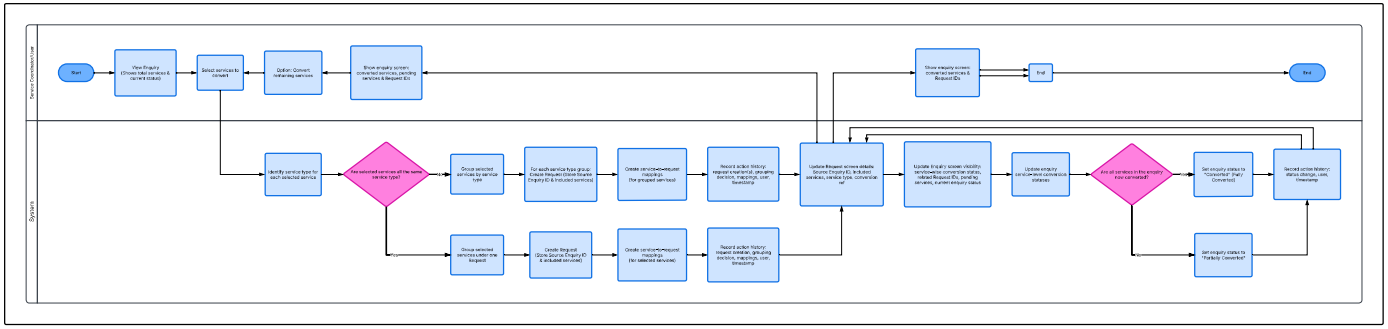
Scope: Converts an enquiry's selected services into one or more requests based on service type grouping, updates service-level and enquiry-level statuses, and records audit history.

Diagram key
- Terminator
- Process
- Decision



Enquiry-to-Request Conversion Flow

Diagram information
This diagram shows the process where a Service Coordinator/User views an enquiry, selects services to convert into one or more Requests, and the System creates Requests, maps services, updates statuses, and records action history. Key components: Service Coordinator/User actions (view enquiry, select services, choose conversion option), System actions (group by service type, create Request, map services, update statuses, record audit history), and decision points (Are selected services all the same service type?, Are all services in this enquiry now converted?).

Enquiry Service Conversion SOP
1. Start from the enquiry view as the Service Coordinator/User.
2. View the enquiry's total services and current status.
3. Select services to convert from the enquiry.
4. Optionally choose to convert remaining services.
5. Identify the service type for each selected service.
   5.1. Check if all selected services are the same service type.
      5.1.1. If Yes, group selected services under one Request.
      5.1.1.1. Create Request storing Source Enquiry ID and included services.
      5.1.1.2. Create service→request mappings for selected services.
      5.1.1.3. Record action history: request created, grouping decision, mappings, user, timestamp.
      5.1.1.4. Update Request screen details (Source Enquiry ID, included services, service type, conversion reference).
      5.1.1.5. Update Enquiry screen visibility with service-wise conversion status, related Request IDs, pending services, current enquiry status.
      5.1.1.6. Update enquiry service-level conversion statuses.
      5.1.1.7. Evaluate whether all services in the enquiry are now converted.
      5.1.1.7.1. If Yes, set enquiry status to "Converted (Fully Converted)" and record action history: status change, user, timestamp.
      5.1.1.7.2. If No, set enquiry status to "Partially Converted" and record action history: status change, user, timestamp.
      5.1.1.8. Stop.
   5.1.2. If No, group selected services by service type.
      5.1.2.1. For each service type group, create a Request storing Source Enquiry ID and included services.
      5.1.2.2. Create service→request mappings for grouped services.
      5.1.2.3. Record action history: request created(s), grouping decision, mappings, user, timestamp.
      5.1.2.4. Update Request screen details (Source Enquiry ID, included services, service type, conversion reference).
      5.1.2.5. Update Enquiry screen visibility with service-wise conversion status, related Request IDs, pending services, current enquiry status.
      5.1.2.6. Update enquiry service-level conversion statuses.
      5.1.2.7. Evaluate whether all services in the enquiry are now converted.
      5.1.2.7.1. If Yes, set enquiry status to "Converted (Fully Converted)" and record action history: status change, user, timestamp.
      5.1.2.7.2. If No, set enquiry status to "Partially Converted" and record action history: status change, user, timestamp.
6. After status update, ensure Request screen details are kept current and visible on the Enquiry screen.
7. End the conversion process once screens and statuses are updated and history recorded.

Generated by @Triveni Y. on June 4, 2026