■ USER MANUAL · MARKETING TEAM

Inquiry Module
& Report Module

Step-by-step Workflow Guide

WHAT YOU'LL LEARN IN THIS MANUAL

- ✓ Submit client inquiries with complete documentation
- ✓ Track inquiries through the 6-stage certification workflow
- ✓ Use the new Cert Body (QRS/TQS) and Audit Stage fields
- ✓ Review, confirm, and request changes on draft proposals
- ✓ Generate, filter, and export professional reports

QRS Certification System

ERP · Scheme & Certification Department

Issued: 06 May 2026

Document v1.0 · Confidential

Doc ID: QRS-MAN-INQ-202605-001

Table of Contents

01 Introduction & Purpose

Welcome to the QRS Inquiry & Report Module manual. This guide is designed specifically for the **Marketing Team** to walk you through every step of submitting client inquiries, tracking their progress through the certification workflow, and producing professional reports for management.

By the end of this manual, you will be able to:

- Submit a complete client inquiry with all required documentation
- Choose the correct certification body (QRS or TQS) and audit stage
- Track inquiries as they move through the 6-stage workflow
- Understand each status change and what action it requires from you
- Generate, review, and confirm certification drafts
- Filter, analyze, and export the inquiry report for management
- Troubleshoot common issues without needing IT support

■ Who should read this manual?

All marketing team members who interact with the QRS ERP system — whether you submit inquiries, follow up with clients, or report progress to management. No technical background is required.

■ Quick navigation tip

Use the Table of Contents on the previous page to jump to any section. Each step includes screenshots-style descriptions and color-coded badges that match exactly what you see on screen.

02 Understanding the Inquiry Module

What it does and why it matters

The Inquiry Module is the **starting point** of every certification engagement. When a client approaches QRS for ISO certification — whether it's their first audit, a routine surveillance, or a re-certification — the marketing team creates an inquiry record in the system. This record then flows through the scheme department, who review the details, draft the proposal, and ultimately issue the final certificate.

Why this module exists

Before this system, inquiries were tracked in spreadsheets and emails — which made it difficult to know the current status, who was responsible, and what documentation was attached. The Inquiry Module solves these problems by giving every inquiry:

✓	**A unique reference number**	*INQ-2026-05-0001*
✓	**A clear status at every moment**	*Pending, In Review, etc.*
✓	**All client documents in one place**	*Trade license, prior cert, etc.*
✓	**Automatic email notifications**	*To you, to scheme, to management*
✓	**Full audit trail**	*Who did what, and when*

Three types of inquiries

Every inquiry is classified by type. This drives what fields are required and how the scheme team handles it:

INITIAL	First-time certification for a brand new client.	No previous certificate. Audit Stage: Stage 1 → Stage 2.
SURVEILLANCE	Routine ongoing audit during the 3-year certificate cycle.	Previous cert required. Audit Stage: Surveillance.
RE-CERTIFICATION	Renewing the certificate at the end of its 3-year validity.	Previous cert required. Audit Stage: Recertification.

03 Workflow Overview — 6 Stages

Every inquiry passes through these stages in order

The certification workflow consists of **6 sequential stages**. Each stage represents the current state of an inquiry, who owns it at that moment, and what action is needed to move it forward.

1. **Pending**
   Inquiry has been submitted by Marketing. Waiting for the Scheme department to begin review.

2. **In Review**
   Scheme is actively reviewing the client's details, scope, and uploaded documents.

3. **Draft Ready**
   Scheme has generated a draft certificate proposal. Marketing/client must review and approve.

4. **Changes Requested**
   Marketing or client has requested corrections to the draft. Scheme will revise it.

5. **Client Confirmed**
   Client has approved the draft. The inquiry is now ready for final issuance.

6. **Final Issued**
   The certificate has been formally issued. The certification process is complete.

> ■ **Important**
>
> An inquiry can loop between **Draft Ready** and **Changes Requested** multiple times until the client is satisfied. There is no penalty for requesting changes — the system is designed to support this back-and-forth.

03 Workflow at a Glance

How an inquiry moves through the system

	MARKETING →	SCHEME →	CLIENT →	SCHEME
Action:	Submit	Review + Draft	Approve or Reject	Issue Final
Status:	Pending	In Review → Draft Ready	Confirmed or Changes Req.	Final Issued

Who is responsible at each stage?

Stage	Owner	What you (Marketing) do
Pending	**Marketing**	Just submitted — wait for Scheme. No action.
In Review	**Scheme**	Wait for Scheme to finish review. Answer questions if asked.
Draft Ready	**Marketing / Client**	Review draft → confirm OR request changes.
Changes Requested	**Scheme**	Wait for Scheme to apply changes. Status returns to Draft Ready.
Client Confirmed	**Scheme**	Wait for Scheme to issue final certificate.
Final Issued	**Done!**	Forward final certificate to client. Archive inquiry.

04 How to Submit a New Inquiry

Step-by-step guide from login to submission

1. **Log in to the QRS ERP system**
Open your browser and go to the QRS portal. Enter your username and password. If you've forgotten your password, click 'Forgot Password' or contact IT. After login, you'll land on the Dashboard.

2. **Navigate to the Inquiries module**
From the left-side menu, click **Modules** → **Inquiries**. You will see the Inquiries page with a list of all existing inquiries, plus a blue **+ Add Inquiry** button at the top right.

3. **Click '+ Add Inquiry' to open the form**
A multi-step form will appear with sections for Company, Inquiry Type, Certification Body, Audit Details, Scope, ISO Standards, Documents, and Notes. Required fields are marked with a red asterisk (*).

4. **Select the company**
Start typing the client's company name in the dropdown — matching companies will appear. If the company doesn't exist yet, click **+ New Company** in the dropdown to create it.

5. **Choose Inquiry Type & Cert Body**
Select one of: **INITIAL**, **SURVEILLANCE**, or **RE-CERTIFICATION**. Then select the Certification Body — either ■ **QRS** or ■ **TQS**. These two fields together drive most of the workflow.

6. **Fill in audit details**
Enter the proposed Audit Date, the Auditor Name (if known), and choose the **Audit Stage** from the dropdown. For Surveillance and Re-certification inquiries, you must also enter the Previous Certificate Number.

7. **Add the scope of work**
In the Scope of Work text area, describe what the client does — the activities, products, or services the certificate will cover. Be specific. Scheme uses this exactly when drafting the proposal.

8. **Select ISO Standards**
Click the standards dropdown and select all standards the client wants to be certified against (e.g., ISO 9001:2015, ISO 14001:2015, ISO 45001:2018). You can select multiple.

9. **Upload supporting documents**
Attach the Trade License, the Previous Certificate (for Surveillance/Re-cert), and any relevant Audit Reports or Scope Letters. Click **+ Add File**, choose the file, then label it correctly.

10

Add notes (optional) and submit

Use the Notes field for anything Scheme should know — special client requests, deadlines, holidays, language preferences. Click the green **Submit Inquiry** button at the bottom. The inquiry is now in **Pending** status.

■ What happens after I click Submit?

The system instantly: (1) saves the inquiry with a unique reference like **INQ-2026-05-0001**, (2) emails the Scheme team and management, (3) shows a real-time notification to the relevant people, and (4) sets the status to **Pending**. You'll see the new inquiry appear at the top of the table.

05 Field-by-Field Reference

What every field in the inquiry form means

Field	Required?	What to enter
Company	Yes	The full legal name of the client. Must match their trade license.
Inquiry Type	Yes	INITIAL (new client), SURVEILLANCE (routine), or RE-CERTIFICATION (renewal).
Cert Body	Yes	■ QRS or ■ TQS — which certification body will issue the certificate.
Audit Stage	Recommended	Stage 1, Stage 2, Surveillance, or Recertification. Used by Scheme for planning.
Audit Date	Yes	The proposed date for the on-site audit. Can be adjusted later.
Auditor Name	No	Name of the proposed lead auditor, if already known.
Previous Cert No.	Conditional	Required for SURVEILLANCE and RE-CERTIFICATION. Format: certificate numbe
Issue Date	No	Date the previous certificate was issued (for Surveillance / Re-cert).
Expiry Date	No	Date the previous certificate expires.
Surv. Audit Due	No	Date by which the next surveillance audit must be completed.
Re-cert Due	No	Date by which re-certification must occur.
EA Code (Accred.)	No	The European Accreditation code for the client's industry sector.
Scope of Work	Yes	Detailed description of activities, products, or services to be certified.
ISO Standards	Yes	Select all standards being requested (e.g., ISO 9001, 14001, 45001).
Documents	Yes	Upload Trade License + Previous Certificate (if applicable) + any others.
Notes	No	Any extra context, special requests, or messages for the Scheme team.

■ About document uploads

Each uploaded document must be labeled. Use the labels: **Trade License**, **Previous Certificate**, **Audit Report**, **Scope Letter**, or **Other**. Maximum file size is 10 MB. Accepted formats: PDF, DOCX, JPG, PNG.

06 Certification Body & Audit Stage

Two new fields you must understand

These two fields are **recently added** and may be unfamiliar. They are important because they determine which body issues the certificate and how the audit is classified for management reporting.

Certification Body

Every inquiry must be assigned to one of two bodies:

■ QRS	**Quality Registrar Systems**	The primary QRS-branded body. Used for most standard certifications.
■ TQS	**Third-party Quality Systems**	Alternative body used in specific regional or sector cases. Check with your manager if unsure.

Audit Stage

The audit stage classifies *where* in the certification lifecycle the audit falls. There are 4 options:

■ Stage 1	Initial document review audit. First step of certification.	*Use for INITIAL inquiries.*
■ Stage 2	On-site implementation audit. Confirms the system works.	*Use after a successful Stage 1.*
■ Surveillance	Annual check during the 3-year validity period.	*Use for SURVEILLANCE inquiries.*
■ Recertification	Full audit at the end of 3 years to renew.	*Use for RE-CERTIFICATION inquiries.*

■ Quick decision rule

If unsure which Audit Stage to pick: match it to the Inquiry Type. INITIAL → Stage 1 (then Stage 2 later). SURVEILLANCE → Surveillance. RE-CERTIFICATION → Recertification. When in doubt, ask the Scheme team.

07 Status Workflow & Actions

What buttons you'll see at each stage

The system shows different action buttons depending on the inquiry's current status. This prevents accidental clicks and keeps everyone on the same page.

● Pending

What you see: Edit · View · Delete (admin only)

What to do: **Wait. Scheme will start review automatically.**

● In Review

What you see: View · Edit (limited)

What to do: **Wait for Scheme. Answer any clarification emails.**

● Draft Ready

What you see: View · Download PDF · Download Word · Confirm · Request Changes

What to do: **Open the draft. Review with the client. Then either Confirm or Request Changes.**

● Changes Requested

What you see: View · See change request notes

What to do: **Wait for Scheme to revise. Status will return to Draft Ready.**

● Client Confirmed

What you see: View · Download PDF · Download Word

What to do: **Wait for Scheme to issue final certificate.**

● Final Issued

What you see: View · Download Final PDF · Archive

What to do: **Send final certificate to the client. Archive the inquiry.**

08 Generating & Confirming Drafts

What to do when an inquiry reaches Draft Ready

When the Scheme department finishes their review, they generate a draft proposal. The status changes to **Draft Ready** and you'll receive an email notification. This is the moment you involve the client.

1 **Open the inquiry from the table**
Click the inquiry's reference number, or click **View**. The detail modal opens with the new draft attached.

2 **Download the draft files**
You'll see two new buttons: ■ **Download PDF** and ■ **Download Word**. Use the PDF for sending to the client. The Word version is in case minor edits are needed before review.

3 **Send to the client**
Email the PDF to your client contact. Wait for their feedback. They will either approve as-is, or send back specific corrections.

4a **If client approves: click 'Confirm Draft'**
Status changes to **Client Confirmed**. Scheme is automatically notified and begins the final issuance step.

4b **If client wants changes: click 'Request Changes'**
A small dialog appears asking for the client's feedback. Type the specific changes the client wants (e.g., 'Update scope to include manufacturing plant 2'). Submit. Status changes to **Changes Requested**. Scheme is notified and will revise the draft.

5 **Repeat if needed**
The cycle Draft Ready ↔ Changes Requested can repeat as many times as needed. Each time, Scheme generates a new draft and you re-send to the client.

■■ Important: be specific in change requests
When clicking **Request Changes**, write the exact changes needed — not just 'client wants changes'. Scheme works from your text directly. Bad: "Update scope." Good: "Add 'manufacturing of polymer-based products' to scope. Remove 'trading' as client no longer trades."

09 Email Notifications

Who gets emailed and when

The system automatically sends emails for every important status change. You don't need to remember to inform anyone — the system handles it.

Event	Who gets emailed	What the email contains
New Inquiry submitted	Scheme team + Management (CC)	Reference, Company, Type, Cert Body, Audit Stage, Scope su
Status: In Review	Marketing (submitter)	Confirmation that Scheme has started review.
Status: Draft Ready	Marketing + Management	Notification with download links for the PDF and Word draft.
Status: Changes Requested	Scheme team + Management (CC)	Includes the specific change request notes you entered.
Status: Client Confirmed	Scheme team + Management (CC)	Notification that the draft is approved and ready for issuance.
Status: Final Issued	Marketing + Management	Final certificate notification with download link.

■ In-app notifications

Besides email, the system also shows a small bell icon (■) in the top right of the screen. Click it to see all notifications related to your inquiries — including ones you may have missed in email.

10 The Report Module — Overview

Your tool for management reporting

The Report Module is a separate page that gives you a high-level view of all inquiries — analytics, charts, distributions, and a downloadable PDF report. Use it whenever your manager asks 'how are we doing this month?' or 'how many inquiries did we close in Q1?'

How to access it

1. **Open the Inquiries page**
   From Modules → Inquiries.
2. **Click the 'Reports' button at the top**
   It's a teal button in the toolbar, usually next to Analytics. Or navigate directly to **Modules** → **Inquiries** → **Reports**.
3. **The report opens in a new view**
   You'll see a dark gradient hero header followed by a series of analytics sections. The data loads automatically based on default filters.

What sections you'll see

#	Section	Shows
01	**Executive Summary**	8 KPI cards: Total, Pending, In Review, Draft Ready, etc.
02	**Cert Body & Audit Stage**	QRS vs TQS counts + Stage 1/2 vs Surveillance/Recert.
03	**Workflow Pipeline**	Visual 6-stage pipeline showing where every inquiry sits.
04	**Distribution Analysis**	Donut charts for status & inquiry type.
05	**Top Contributors**	Most active auditors and submitters.
06	**ISO Standards Demand**	Most-requested standards across inquiries.
07	**Monthly Trend**	Bar chart of inquiries per month — clickable.
08	**Inquiry List**	Full table of inquiries matching your filters.

11 Using Report Filters

Slice the data exactly the way you need

At the top of the report you'll see a filter bar with 6 dropdowns. Adjust them and the entire report — KPIs, charts, list — refreshes instantly.

Filter	Default	Use case
Year	Current year	Pick another year to compare historical performance.
Month	All Months	Narrow to a specific month for monthly reviews.
Status	All Statuses	Filter to e.g. 'Pending' to see only what needs attention.
Type	All Types	Filter to 'INITIAL' to see only new client onboarding.
Cert Body	All Bodies	Filter to QRS only or TQS only — for body-specific reporting.
Audit Stage	All Stages	Filter to 'Stage 1' to see only first-stage audits, etc.

Practical examples

■ Monthly review meeting

Year = current, Month = previous month, others = All. Gives you a clean snapshot of last month's performance.

■ QRS body performance

All filters = All except Cert Body = QRS. Shows only QRS-branded inquiries — useful for QRS-specific KPIs.

■ First-time customer onboarding

Type = INITIAL, Audit Stage = Stage 1. Shows only first-stage audits for new clients.

■■ What's stuck?

Status = Pending OR Status = Changes Requested. Highlights inquiries that need someone's attention.

■ Tip: 'Clear Filters' button

If you've narrowed the report too much and seeing 0 results, just click ✕ **Clear Filters** in the filter bar to reset everything to defaults.

12 Reading the KPIs & Charts

How to interpret what you see on screen

KPI cards (Section 01)

These are the big number tiles at the top. Each card shows a single metric. The colored bar at the top of each card is just visual styling — no meaning.

Card	What it means
Total Inquiries	All inquiries matching your filters. The 'biggest picture' number.
Pending	Submitted but not yet picked up by Scheme. If this is high, something is stuck.
In Review	Currently being reviewed by Scheme. Healthy when small and moving.
Draft Ready	Awaiting client approval. If high, marketing has follow-up to do.
Changes Requested	Drafts the client wants revised. If high, something is wrong with how scope is being captured.
Client Confirmed	Approved by client, awaiting final issuance from Scheme.
Final Issued	Successfully completed. The success metric.
Conversion Rate	Percentage of total that reached Final Issued. Higher is better. Target: 70%+.

Cert Body / Audit Stage KPIs (Section 02)

Four cards show: **QRS Inquiries**, **TQS Inquiries**, **Stage 1 + Stage 2** (initial certifications), and **Surveillance + Recert** (ongoing audits). The donut charts below break this down visually.

Workflow Pipeline (Section 03)

A horizontal flow diagram showing all 6 stages with the count at each. If you see big numbers stuck at 'Pending' or 'Changes Requested', that's a bottleneck worth investigating.

Donut charts (Section 04)

Two side-by-side donuts: one for status distribution, one for inquiry type. Each segment shows count + percentage of total. Helpful for instant proportional understanding.

Top Contributors & Standards (Sections 05–06)

Ranked lists. Use these to recognize high performers and spot which ISO standards are most in demand — useful for marketing campaigns.

Monthly Trend (Section 07)

Bar chart showing inquiry counts per month for the selected year. **Click any bar** to filter the entire report to just that month — a quick way to drill in.

Inquiry List (Section 08)

The full data table. Shows up to 50 rows on screen. The PDF download contains all rows. Each row has color-coded badges for type, cert body, audit stage, and status — making it easy to scan.

13 Exporting & Printing Reports

Three ways to share the report with management

1. **Apply your filters first**
   The export uses whatever filters you've set. So before exporting, narrow the report exactly the way you want it shared.

2. **Click '↓ Download PDF' in the top right**
   A teal button at the top of the page. The system generates a multi-page PDF of the entire report — including all charts, tables, and analytics. The filename includes the year, month, and active filters.

3. **Or click '■ Print'**
   Opens your browser's print dialog. The report is print-optimized — filter bar and action buttons are hidden, and content fits A4.

4. **Or use 'Refresh' to reload**
   If new inquiries have been added during your session, click ■ **Refresh** to pull the latest data without reloading the page.

■ What the PDF looks like

The downloaded PDF is a high-resolution capture of exactly what's on screen. It includes the dark gradient hero header, all 8 sections, and the QRS branding footer. Suitable for sending directly to management or printing professionally.

■■ PDF generation takes a few seconds

Don't refresh the page while the PDF is being created. You'll see **'Generating PDF…'** on the button. Wait until your browser pops up the save dialog. For large reports (1000+ inquiries) this may take 10–15 seconds.

14 Quick Reference Card

Print this page and keep it at your desk

TASK	WHERE TO GO	WHAT TO CLICK
Submit a new inquiry	Inquiries page	`+ Add Inquiry → fill form → Submit`
Find an inquiry	Inquiries page	`Use the search bar (by Ref or Company)`
See full details	Inquiries table	`Click the Ref number, or click View`
Edit an inquiry	Detail modal or table row	`Click ═■ Edit`
Download a draft	When status = Draft Ready	`■ Download PDF / ■ Download Word`
Confirm a draft	When status = Draft Ready	`■ Confirm Draft`
Request changes	When status = Draft Ready	`■ Request Changes → enter notes`
See analytics	Inquiries page	`■ Analytics button`
Open full report	Inquiries page	`Reports button → /inquiries/report`
Filter the report	Top of report page	`6 dropdowns: Year, Month, Status, Type, Cert Body, Stage`
Download report PDF	Top right of report page	`↓ Download PDF`
Print report	Top right of report page	`■ Print`
See notifications	Top of any page	`■ Bell icon`

Status color legend

● Pending ● In Review ● Draft Ready ● Changes Requested ● Client Confirmed ● Final Issued

15 Troubleshooting & FAQ

Common issues and how to resolve them

Q1. I can't find the company in the dropdown.

Companies are added once. If a brand new client, click **+ New Company** in the dropdown. If you're certain the company exists, try searching by trade license number or partial name. Still missing? Contact admin.

Q2. The form won't let me submit — fields are red.

A red border = required field is empty or invalid. Scroll up to find the red fields and complete them. Common culprits: Audit Date, Scope of Work, ISO Standards selection, Trade License upload.

Q3. I uploaded the wrong document. How do I remove it?

Open the inquiry in Edit mode. In the Documents section, click the ✕ next to the wrong file. Then upload the correct one. Save.

Q4. The client wants changes after I already clicked Confirm.

Once Confirmed, only Scheme can revert it. Email or Slack the Scheme team explaining what changed. They'll set status back to Draft Ready and revise.

Q5. I don't see Cert Body or Audit Stage on the form.

Hard-refresh your browser (Ctrl+Shift+R or Cmd+Shift+R). If still missing, you may be on an older version — log out, log back in. Still missing? Contact IT.

Q6. The report is showing 0 inquiries.

Your filters are likely too narrow. Click ✕ **Clear Filters** at the top of the report and check defaults. Common cause: Year set to a future year or Month set when no inquiries exist for it.

Q7. PDF download fails.

Try again — sometimes it's a temporary glitch. If it still fails: clear browser cache, or try a different browser (Chrome works best). For very large reports, use filters to narrow first, then download.

Q8. I forgot whether I should choose QRS or TQS.

Default to QRS unless your manager specifically told you TQS. The two bodies are not interchangeable mid-process — once submitted with QRS, switching to TQS requires Scheme intervention.

Q9. Can I delete an inquiry?

Only admins can delete. Marketing users can edit but not delete. If you submitted a duplicate, contact your manager — they'll have admin delete it.

Q10. Where do email notifications go?

To the email address on your user profile. Check your settings if you're not receiving them. Also check Spam — first-time emails sometimes land there.

> **■ Still stuck? Contact us**
>
> **Scheme team:** for workflow / status / draft questions. **IT support:** for login issues, missing buttons, or system errors. **Your manager:** for cert body decisions, scope clarifications, or policy questions. Use the in-app feedback button (■■) to report bugs.

End of manual. Thank you for taking the time to read it!

Document v1.0 · Issued 06 May 2026 · QRS Certification System · For Marketing Team