

SDE

5TH JAN 2023

PREPARED

BY:

HEMA'S ENTERPRISES PVT



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05/01/2023	1.0	Initial draft



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PROJECT OBJECTIVE:

The goal of the project is to deliver the product from distributor to customer and to capture the daily activity of the distributor, in which the activities are done accordingly as per the schedule is monitored.

PROJECT DESCRIPTION:

The distributor send orders to the retailers in which the process is captured as morning and evening photo copy upload so that the entire process in day today day activity is maintained using this website. SDE and SM activities are monitored by ZSM and ASM. ZSM and ASM are the higher priorities.SDE only has the permission to upload beat optimization and score card is only for SM.

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PROJECT SCOPE:

S.NO	MENU	PROJECT DESCRIPTION
1	Login	<ul style="list-style-type: none"> – Login has user credential types thus as per their desired mobile number and password the application usage permission will be allotted and have to access with the recommended user login. – If the user forgets the password they can reset the password using forget password option.
2	CK Competition Watch <ul style="list-style-type: none"> - ZSM - ASM - SDE - SM 	<ul style="list-style-type: none"> – ZSM/ASM/SDE/SM Users will have the competition watch menu. These users will visit the market personally and will capture the visited points though the application. – Then the list can be copied; download in excel, CSV, PDF and can print and so user can search the particular form. – Additionally the colvis option is given to control the header as per user's requirement. – The user can search through Distributor name in search option tab. – The list of forms with the header options as S. no, date, source, insight category, comment, images, created by, created on, action. – Above given details are common for the entire login. – ZSM must have drop down option for ASM list, TSO list, and SM list with clear tab. – ASM must have drop down option for TSO list and SM list with clear tab. – SDE must have drop down option for SM list with clear tab. – SDE should have ADD FORM tab which include the input field to be captured as Date, Source as drop down option has Market Visit. – Then to select the category with check box options – the categories are consumer, competition, Trade, Product, New Trends, Packaging, Process-best practice, and others options. – Comment input text box is the next input field

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		<p>and the user can capture the images. The image can be uploaded from the respective system.</p> <ul style="list-style-type: none"> – Once the data is captured, user can save the form. – After saving the form, the form will be listed in the home page of SDE dashboard.
3	<p>Salesman Funnel</p> <ul style="list-style-type: none"> - ZSM - ASM - SDE 	<ul style="list-style-type: none"> – ZSM/ASM/ SDE Users will enter the details of the candidate for Recruitment; the module is Sales Man Funnel. – Then the list can be copied; download in excel, CSV, PDF and can print and so user can search the particular form. – Additionally the colvis option is given to control the header as per user's requirement. – The user can search through Distributor name in search option tab. – Above given details are common for the entire login. – ZSM need to be with Menu option like VSO verified forms, Approved forms, Future prospect, Entered Forms and Funnel form. – The list of form with the header option as S.NO, name, mobile number, created on, VSO status, ASM status, SDE score, VSO score, Created by and action. These header options are common for above all the menu in ZSM except funnel form. – Funnel form with the header option like S.NO, name, mobile number, State, District, created on, Score, Created by and action. – VSO verified forms, Approved forms should contain ASM list and SDE list with drop down option it also have clear tab. – Future prospect should contain SDE list with drop down option it also have clear tab. – Entered Forms should contain ASM list, SDE list, VSO status and ASM status with drop down option it also have clear tab. – Funnel form should contain ASM list and SDE list with drop down option it also have clear tab.

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		<ul style="list-style-type: none"> – ASM need to be with Menu option like VSO verified forms, Approved forms, Future prospect, Entered Forms and Funnel form. – The list of form with the header option as S.NO, name, mobile number, created on, VSO status, ASM status, SDE score, VSO score, Created by and action. These header options are common for above all the menu in ZSM except funnel form. – Funnel form with the header option like S.NO, name, mobile number, State, District, created on, Score, Created by and action. – VSO verified forms, Approved forms, Future prospect should contain SDE list with drop down option and it also have clear tab. – Entered Forms should contain SDE list, VSO status and ASM status with drop down option it also have clear tab. – Funnel form should contain SDE list with drop down option. – SDE Thus, the Recruitment form will capture the basic details of input field are Name of the candidate, Mobile number, Address, State with drop option of states, Division with drop down option of divisions from the selected states, Town with drop down option of towns from the selected divisions, Existing RSSM name, Alternative mobile number, Upload resume, and then the other additional options with the drop down options – Experience, education, age, technology adaption, terrain knowledge, family background and then at last the two options need to be there for saving the data as draft and submit option. After submission only the data can be submitted for the verification of higher officials. – Once the data is captured, user can submit the recruitment data. – After saving the form, the form will be listed in the Entered page of Sales man funnel. – Entered form should have VSO status and ASM status with drop down option and it also
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		<p>have clear tab.</p> <ul style="list-style-type: none"> – The list of forms with the header options as S. no, Name, Mobile number, state, created on, VSO Status, ASM Status, SDE score, VSO score, and action. – Each form will have the action option. – Then the list can be copied; download in excel, CSV, PDF and can print and so user can search the particular form. – Additionally the colvis option is given to control the header as per user's requirement. – Then, the Funnel form option need to show the verified candidate list with the header options as S. no, Name, Mobile number, state, created on, SDE score, and action. – Once SDE submits the form, VA will recheck the form through interaction with the candidate and will review the form. – So, once VA review is over, the ASM will approve the form or else can reject the form. The approval permission is with the ASM user. – Similarly, ZSM user can view all the data, whether the form is approved or not and can view the score.
4	<p>RS Funnel</p> <ul style="list-style-type: none"> - ZSM - ASM - SDE 	<p>ZSM/ASM/ SDE Users will enter the details of the Distributors; the module is RS FUNNEL.</p> <ul style="list-style-type: none"> – Then the list can be copied; download in excel, CSV, PDF and can print and so user can search the particular form. – Additionally the colvis option is given to control the header as per user's requirement. – The user can search through Distributor name in search option tab. – Above given details are common for the entire login. – ZSM need to be with Menu option like VSO verified forms, Approved forms, Future prospect, Entered Forms and Funnel form. – The list of form with the header option as S.NO, name, mobile number, created on, VSO status, ASM status, SDE score, VSO score, Created by and action. These header options

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		<p>are common for above all the menu in ZSM except funnel form.</p> <ul style="list-style-type: none"> – Funnel form with the header option like S.NO, name, mobile number, State, District, created on, Score, Created by and action. – VSO verified forms should contain ASM list and SDE list with drop down option it also have clear tab. – Approved forms and Future prospect should contain SDE list with drop down option and it also have clear tab. – Entered Forms should contain SDE list, VSO status and ASM status with drop down option it also have clear tab. – Funnel form should contain SDE list with drop down option. – ASM need to be with Menu option like VSO verified forms, Approved forms, Future prospect, Entered Forms and Funnel form. – The list of form with the header option as S.NO, name, mobile number, created on, VSO status, ASM status, SDE score, VSO score, Created by and action. These header options are common for above all the menu in ZSM except funnel form. – Funnel form with the header option like S.NO, name, mobile number, State, District, created on, Score, Created by and action. – VSO verified forms, Approved forms, Future prospect should contain SDE list with drop down option and it also have clear tab. – Entered Forms should contain SDE list, VSO status and ASM status with drop down option it also have clear tab. – Funnel form should contain SDE list with drop down option. – SDE Thus, the Recruitment form will capture the basic details of input field are Name, Distributor name, Existing RS name, GST, Mobile number, Address, Sate with drop option of states, Division with drop down option of divisions from the selected states,
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		<p>Town with drop down option of towns from the selected divisions, Existing RSSM name, Alternative mobile number, Upload office / warehouse photos, and then the other additional options with the drop down options – age of org, companies handled, retailer served, godown, computer, printer, internet, delivery vehicle, future investment, proprietary involvement, and market feedback and then at last the two options need to be there for saving the data as draft and submit option. After submission only the data can be submitted for the verification of higher officials.</p> <ul style="list-style-type: none"> – Once the data is captured, user can submit the recruitment data. – After saving the form, the form will be listed in the Entered page of Sales man funnel. – Entered form should contain VSO status and ASM status with drop down option it also have clear tab. – The list of forms with the header options as S. no, Name, Mobile number, state, created on, VSO Status, ASM Status, SDE score, VSO score, and action. – Each form will have the action option. – Then the list can be copied; download in excel, CSV, PDF and can print and so user can search the particular form. – Additionally the colvis option is given to control the header as per user's requirement. – Then, the Funnel form option need to show the verified candidate list with the header options as S. no, Name, Mobile number, state, created on, score, and action. – Once SDE submits the form, VA will recheck the form through interaction with the candidate and will review the form. – So, once VA review is over, the ASM will approve the form or else can reject the form. The approval permission is with the ASM user. – Similarly, ZSM user can view all the data,
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		whether the form is approved or not and can view the score.
5	SS Funnel <ul style="list-style-type: none"> - ZSM - ASM - SDE 	<p>ZSM/ASM/SDE Users will enter the details of the Distributors; the module is SS FUNNEL.</p> <ul style="list-style-type: none"> – Then the list can be copied; download in excel, CSV, PDF and can print and so user can search the particular form. – Additionally the colvis option is given to control the header as per user's requirement. – The user can search through Distributor name in search option tab. – Above given details are common for the entire login. – ZSM need to be with Menu option like VSO verified forms, Approved forms, Future prospect, Entered Forms and Funnel form. – The list of form with the header option as S.NO, name, mobile number, created on, VSO status, ASM status, SDE score, VSO score, Created by and action. These header options are common for above all the menu in ZSM except funnel form. – Funnel form with the header option like S.NO, name, mobile number, State, District, created on, Score, Created by and action. – VSO verified forms should contain ASM list and SDE list with drop down option it also have clear tab. – Approved forms, Future prospect should contain SDE list with drop down option and it also have clear tab. – Entered Forms should contain SDE list, VSO status and ASM status with drop down option it also have clear tab. – Funnel form should contain SDE list with drop down option. – ASM need to be with Menu option like VSO verified forms, Approved forms, Future prospect, Entered Forms and Funnel form. – The list of form with the header option as S.NO, name, mobile number, created on, VSO status, ASM status, SDE score, VSO score,

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		<p>Created by and action. These header options are common for above all the menu in ZSM except funnel form.</p> <ul style="list-style-type: none"> – Funnel form with the header option like S.NO, name, mobile number, State, District, created on, Score, Created by and action. – VSO verified forms, Approved forms, Future prospect should contain SDE list with drop down option and it also have clear tab. – Entered Forms should contain SDE list, VSO status and ASM status with drop down option it also have clear tab. – Funnel form should contain SDE list with drop down option. – SDE Thus, the Recruitment form will capture the basic details of input field are Name, Distributor name, Existing SS name, GST, Mobile number, Address, Sate with drop option of states, Division with drop down option of divisions from the selected states, Town with drop down option of towns from the selected divisions, Existing RSSM name, Alternative mobile number, Upload office / warehouse photos, and then the other additional options with the drop down options <ul style="list-style-type: none"> – age of org, companies handled, retailer served, godown, computer, printer, internet, delivery vehicle, future investment, proprietary involvement, and market feedback and then at last the two options need to be there for saving the data as draft and submit option. After submission only the data can be submitted for the verification of higher officials. – Once the data is captured, user can submit the recruitment data. – After saving the form, the form will be listed in the Entered page of Sales man funnel. – Entered form should contain VSO status and ASM status with drop down option it also have clear tab. – The list of forms with the header options as S.
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		<p>no, Name, Mobile number, state, created on, VSO Status, ASM Status, SDE score, VSO score, and action.</p> <ul style="list-style-type: none"> – Each form will have the action option. – Then the list can be copied; download in excel, CSV, PDF and can print and so user can search the particular form. – Additionally the colvis option is given to control the header as per user's requirement. – Then, the Funnel form option need to show the verified candidate list with the header options as S. no, Name, Mobile number, state, created on, score, and action. – Once SDE submits the form, VA will recheck the form through interaction with the candidate and will review the form. – So, once VA review is over, the ASM will approve the form or else can reject the form. The approval permission is with the ASM user. – Similarly, ZSM user can view all the data, whether the form is approved or not and can view the score.
6	RS Review <ul style="list-style-type: none"> - ZSM - ASM - SDE 	<ul style="list-style-type: none"> – ZSM/ASM RS Review will capture the data of RS distributors and their overall performance. – It should contain Name with drop down option and it also have clear tab. – SDE Thus, the performance to be added for RS Distributors with the following header options and each will have the drop down options. – The headers are Name, Select week, Stocks as per norms, Infra RSSM VS Actual, Infra delivery vehicle VS Actual, Number of RED RSSM, Order VS Delivery, FF Absenteeism (How & Total calls condition), FF Absenteeism (Actual absent), NPD Investment, Financials, Infrastructure – Warehouse, SSFA = XDM, XDM regular usage, issues raised with SDE – Once the data is captured, user can submit the data. – After saving the data, the performance will be listed in the Add key Performance. – The list of performance with the header

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		<p>options as S. no, Name, created by, selected week, score, and action.</p> <ul style="list-style-type: none"> – Each performance will have the action option. – Then the list can be copied; download in excel, CSV, PDF and can print and so user can search the particular form. – Additionally the colvis option is given to control the header as per user's requirement.
7	SS Review <ul style="list-style-type: none"> - ZSM - ASM - SDE 	<ul style="list-style-type: none"> – ZSM/ASM RS Review will capture the data of RS distributors and their overall performance. – It should contain Name with drop down option and it also have clear tab. – SDE Thus, the performance to be added for RS Distributors with the following header options and each will have the drop down options. – The headers are Name, Select week, Stocks as per norms, Infra RSSM VS Actual, Infra delivery vehicle VS Actual, Number of RED RSSM, Order VS Delivery, Absenteeism (How & Total calls condition), Absenteeism (Actual absent), NPD Investment, Financials, Infrastructure – Warehouse, SSFA = XDM, XDM regular usage, issues raised with SDE – Once the data is captured, user can submit the data. – After saving the data, the performance will be listed in the Add key Performance. – The list of performance with the header options as S. no, Name, created by, selected week, score, and action. – Each performance will have the action option. – Then the list can be copied; download in excel, CSV, PDF and can print and so user can search the particular form. – Additionally the colvis option is given to control the header as per user's requirement
8	SDE Market Visit <ul style="list-style-type: none"> - ZSM - ASM - SDE - SM 	<p>ZSM will display the calendar report which includes Business, ASM list, SDE list and SM list with drop down option.</p> <ul style="list-style-type: none"> – And it also contains clear tab option. – It contain updated calendar which display Distributor's day to day work report.

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		<ul style="list-style-type: none"> – Work report includes header options like Auto ID, RSSM, beat, RS, Total call made, Value, Bills cut, TLSD, RSSM image (morning and evening) and Feedback option. <p>ASM will display the calendar report which includes SDE name and SM list with drop down option.</p> <ul style="list-style-type: none"> – And it also contains clear tab option. – It contain updated calendar which display Distributor's day to day work report. – Work report includes header options like Auto ID, RSSM, beat, RS, Total call made, Value, Bills cut, TLSD, RSSM image (morning and evening) and Feedback option. <p>SDE/SM - Entered forms should contain GO To Market tab which include RS, RSSM, Beat with drop down option. Total calls made, value, Bills cut, TLSD as input field. RSSM Image (Morning, Evening) with choose file option. Feedback/comment in input field. And Start tab.</p> <ul style="list-style-type: none"> – It should have date option with updated calendar And Clear tab. – In the drop down option 10, 25, 50, 100 numeric are there, depending upon user's requirement they can view the entries. – The user can search through Distributor name in search option tab. – It need to be with header options like S.NO, RS, RSSM, Beat, Total calls made, Value, Bills cut, TLSD, Market images, Created date, End date and (Action with edit tab which is redirect to GO To market tab). <p>Calendar report should display Updated calendar.</p>
9	Incentive <ul style="list-style-type: none"> - ZSM - ASM - SDE 	<p>ZSM need to display menu like Incentive and Slab.</p> <ul style="list-style-type: none"> – Incentive should display ASM name, SDE name and JC type with drop down option. It also have Refresh tab. – In the drop down option 10, 25, 50, 100 numeric is there, depending upon user's requirement they can view the entries. – The user can search through Distributor name in search option tab. – It should have following header options like

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		<p>ASM name, SDE name, Market, Mandays market, Mandays ACH, Mandays%, Mandays amount, Orange salesman target, Orange salesman ACH, Orange salesman%, Orange salesman amount, CK super star target, CK super star ACH, CK super star%, CK super star amount, CK Elite Kudumbam Parivar target, CK Elite Kudumbam Parivar ACH, CK Elite Kudumbam Parivar%, CK Elite Kudumbam Parivar amount, Sec value target, Sec value ACH, Sec value%, Sec value amount, Rising star outlet target, Rising star outlet ACH, Rising star outlet%, Rising star outlet amount, Total amount, pending last month, Final amount and remarks.</p> <ul style="list-style-type: none"> – Slab In the drop down option 10, 25, 50, 100 numeric is there, depending upon user's requirement they can view the entries. – The user can search through Distributor name in search option tab. – It should contain header options like S.NO, Parameter, slab, amount and measurement. <p>ASM need to display menu like Incentive and Slab.</p> <ul style="list-style-type: none"> – Incentive should display SDE name and JC type with drop down option. It also have Refresh tab. – In the drop down option 10, 25, 50, 100 numeric is there, depending upon user's requirement they can view the entries. – The user can search through Distributor name in search option tab. – It should contain following header as S.NO, SDE name, Market, Incentive details. <p>SDE Should display Incentive and Slab menu.</p> <ul style="list-style-type: none"> – Incentive should contain JC type with drop down option And Refresh tab. – It need to be with header options Key performance indices, Target, Achieved, %, Amount. – Slab In the drop down option 10, 25, 50, 100 numeric is there, depending upon user's requirement they can view the entries.
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		<ul style="list-style-type: none"> – The user can search through Distributor name in search option tab. – It needs to be with header options S.NO, Parameter, Slab, Amount and Measurement.
10	Beat optimization <ul style="list-style-type: none"> - ZSM - ASM - SDE 	<p>ZSM should contain report view and table view menu.</p> <ul style="list-style-type: none"> – Report view in the drop down option 10, 25, 50, 100 numeric is there, depending upon user's requirement they can view the entries. – The user can search through Distributor name in search option tab. – It should contain following header as S.NO, Dist name, Dist code, Outlet score and status. – Table view need to display ASM Name and SDE name with drop down option. It also have refresh tab. – In the drop down option 10, 25, 50, 100 numeric is there, depending upon user's requirement they can view the entries. – The user can search through Distributor name in search option tab. – It should have headers like S.NO, Dist cus code, cmp cus code, outlet name, old route code, rew route code, new suggestive route code, new suggestive route name, outlet must visit, Beat frequency, outlet score, ZM, AM, SDe emp code, SDE name, Salesman name, salesman SSFA ID, new route code2, new beat name, final beat frequency, Visit day (Monday/Saturday), comments, created date and End date. <p>ASM should contain report view menu. Which includes</p> <ul style="list-style-type: none"> – Report view in the drop down option 10, 25, 50, 100 numeric is there, depending upon user's requirement they can view the entries. – The user can search through Distributor name in search option tab. – It should contain following header as S.NO, SDE name, Dist name, Dist code, NO. Of outlets and status. <p>SDE should provide all the outlet details and beat report in report format and table format.</p>

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		<ul style="list-style-type: none"> – In Report View the outlet details list should have headers S.NO, Dist name, Dist code, NO. of outlets and Status. – In Table View the beat report has to be listed with headers S.NO, Dist CUST Code, CMP CUS Code, Outlet Name, Old Route Code, New Suggestive Route Name, Old Must Visit, Beat Frequency, ZM, AM, SDE Emp Code, SDE Name, Salesman Name, Salesman SSFA ID, New Route Code2, New Beat Name, Final Beat Frequency, Visit Day (Monday/Saturday), Comments, Created Date, End Date. – The Search option should help find particular outlet information or Beat report. – Show entries option must show the list as per numbering as 10, 25, 50,100.
11	Orange salesman performance <ul style="list-style-type: none"> - ZSM - ASM - SDE 	<p>ZSM It need to be with Report view Which includes Orange salesman report format , JC type, ASM list, SDE list and OSM list with drop down option. It also have refresh tab.</p> <ul style="list-style-type: none"> – In the drop down option 10, 25, 50, 100 numeric is there, depending upon user's requirement they can view the entries. – The user can search through Distributor name in search option tab. – It should have following header options like S.NO, ASM name, SDE name, OSM name, ECO (sum), Planned man days, Actual man days, % man days, Calls made (sum), calls made/SM/day, productive calls (sum), Productive calls/SM/day, productivity%, Total bills cut, Bills/SM/day, Total lines sold, Lines/SM/day. <p>ASM It needs to be with Report view Which includes Orange salesman report format, JC type, and SDE list with drop down option. It also have reset tab.</p> <ul style="list-style-type: none"> – In the drop down option 10, 25, 50, 100 numeric is there, depending upon user's requirement they can view the entries. – The user can search through Distributor name in search option tab. – It should have following header options like

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		<p>S.NO, SDE name, OSM name, ECO (sum), Planned man days, Actual man days, % man days, Calls made (sum), calls made/SM/day, productive calls (sum), Productive calls/SM/day, productivity%, Total bills cut, Bills/SM/day, Total lines sold, Lines/SM/day.</p> <p>SDE it must have report view which includes the headers of the report view must hold filter options like Orange salesman Report Format(JC Wise, Weekly, Daily) in drop down along with refresh option</p> <ul style="list-style-type: none"> – Map Orange salesman Report Format automatically as – If JC Wise is chosen then it must ask for JC (drop down) then to OSM List in drop down. The Search option should help find particular outlet information or Beat report. Show entries option must show the list as per numbering as 10, 25, 50,100.The header option of report should have S.NO, Orange Salesman Name, ECO(Sum), Planned Man Days, Actual Man Days, % Man Days, Calls Made(Sum), Calls Made/Day, Productive Calls (Sum), Productive Calls/Day, Productivity, Total Bills Cut, Bills/Day, Total Lines Sold, Lines/Day – If weekly is chosen then it should list OSM name (in drop down) along with refresh option. The header of weekly includes Current JC, Man day's %, Productivity %. – If Daily then it must OSM name in drop down along with refresh option .The performance report is shown in calendar as month, week and day.
12	5 sec's Scorecard	Score card report is based on pre defined Man day norms (like Net salary, total days worked, conveyance, etc...), PC, SSFA Mobile Number.



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REFERENCE:

SDE login:

1. In Beat optimization – capture the distributor name in Dist name header.
2. In Beat optimization - Display the status as completed or pending in status header.
3. In Beat optimization - Change outlet Score to No. of outlets.
4. In Orange salesman - Change the value in calendar view, for e.g.: Value*1 lakh.
5. In Orange salesman - Convert the Mandays and Productivity in % in JC weeks.
6. In Orange salesman - Add JC-1 and JC- 2 in column.
7. In Orange salesman - Change OSM list field as OSM name, JC type field as JC.
8. In Orange salesman - Sort the issues in OSM name.

ASM login:

1. In SDE market visit - Change SDE list as SDE name.
2. In SDE market visit - Remove Business field.
3. Sort Orange salesman with Orange color code and then sort the normal salesman.
4. In Beat optimization - Add SDE name header.
5. In Beat optimization – Remove table view menu and report the view format.
6. In Orange salesman - Sort the SDE name in.
7. In Orange salesman – Sort the JC in JC wise.
8. In Orange salesman – Remove OSM list field.
9. In Orange salesman – Remove Search option.
10. In Orange salesman – Change Refresh tab as Reset.

So, as of now these are the points which is discussed in meeting on (04/01/2023) which is updated in this document.