

## SANCHU MIS AUTOMATION TOOL

July 7, 2023

DATE	VERSION NUMBER	REMARKS	APPROVED BY
28/04/2023	Initial Draft - 1	Document prepared based on Google review and Narcotics discussion 21/04/2023	<b>Sanchu Team – 02/05/2023</b>
25/05/2023	Initial Draft - 2	Document prepared based on Expiry audit, Expiry discard audit, New license tracker, vet buddy, wonder soft tool audit, Stock audit, & Employee Requirement open position tracking discussion – 05/05, 08/05, 09/05, 11/05, 12/05, 15/05/2023.	<b>Sanchu TEAM – 30/05/2023, 02/06/2023.</b>
07/07/2023	Initial Draft - 3	Document prepared based on grooming Prehealth checkup report, unit wise NPS reports, employee wise NPS reports, lost customer call back reports, social media call back reports, next day appointment reminder call back reports, appointment cancellation call back reports, feedback call appointment lead reports, treatment success – 30/5, 5/6, 02/06, 07/06, 15/06, 23/06, 22/06.	

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## PROJECT SCOPE

### 1. GOOGLE REVIEW REPORTS:

S.NO	MENU	DESCRIPTION
1.	Dash Board	<p>Google review is to maintain the MIS reports and capture the reports, rate, review by Google reviews and it will comparable based on the month.</p> <ul style="list-style-type: none"> <li>– Dashboard should display                             <ul style="list-style-type: none"> <li>○ Total no of Google review,</li> <li>○ Google rating,</li> <li>○ No of negative Google review,</li> <li>○ Category wise Google rating,</li> <li>○ Google negative rating gap analysis,</li> <li>○ Employee wise Google rating,</li> <li>○ Category wise negative Google reviews,</li> <li>○ Best review for employee.</li> </ul> </li> </ul>
2.	Total no of Google review	<ul style="list-style-type: none"> <li>– Based on the data reports of customer comments and feedback need to derive the count wise Google reviews for each unit and it should be display in dashboard and for all the month the count will be compared.</li> </ul>
3.	Google Rating	<ul style="list-style-type: none"> <li>– Based on the rating in data reports the Google rating should be derived in count wise and it must be display as total Google rating in dashboard. Monthly wise total average rating should be derived and display.</li> </ul>
4.	No of negative Google review	<ul style="list-style-type: none"> <li>– The total number of negative Google reviews should be derive from the feed back in data reports and it should display as count wise of total negative Google review for each unit. It also need to shown as day wise, week wise and month wise.</li> </ul>
5.	Category wise Google rating	<ul style="list-style-type: none"> <li>– After negative review, the negative feedback should be split up for category wise fetch from the data report for each unit should display in count wise.</li> </ul>
6.	Google negative rating gap analysis	<ul style="list-style-type: none"> <li>– The customer's negative rating should analysis and display the customer comment briefly should show in category wise. Categories like service, price and saloon.</li> </ul>

7.	Employee wise Google rating	<ul style="list-style-type: none"> <li>Employee wise Google review for each employee should fetch from the data report need to display the employee name and their particular negative and positive feedback should display based on count wise and total number of Google review for particular employee also need to display in dashboard.</li> </ul>
8.	Category wise negative Google reviews.	<ul style="list-style-type: none"> <li>Based on the negative feedback of employee the category wise should review the negative Google reviews. For particular employee need to show the category wise reviews in count wise should be display.</li> </ul>
9.	Best review for employee	<ul style="list-style-type: none"> <li>After negative review, best review also should display derived from data report in count wise and should display.</li> </ul>

## 2. NARCOTIC AUDIT REPORT

S.NO	MENU	DESCRIPTION
1.	Dash Board	<p>For particular unit it needs to follow the respective parameters along with adherence percentage and violation remarks. Based on this the stock count and average percentage of the adherence should be Display in dashboard based on month wise.</p> <ul style="list-style-type: none"> <li>The dashboard should display,                             <ul style="list-style-type: none"> <li>Narcotic stock adherence percentage</li> <li>Narcotic process adherence percentage</li> <li>violation data</li> </ul> </li> </ul>
2.	Narcotic stock adherence percentage	<ul style="list-style-type: none"> <li>Only for narcotic stock the adherence percentage should be derived from the data report and need to show for a particular unit in count wise. The narcotic stock should display in dashboard based on month wise.</li> </ul>
3.	Narcotic Process Adherence Percentage	<ul style="list-style-type: none"> <li>Over all narcotic process adherence percentage should be fetch from the data base and need to show the average percentage wise report for particular unit in dashboard.</li> </ul>
4.	violation data	<ul style="list-style-type: none"> <li>The violation data also should display in dashboard as count wise based on the data report for particular unit. How much violation for unit wise should display based on the data report.</li> </ul>

**3. EXPIRTY AUDIT DATA AUTOMATION:**

S.NO	MENU	DESCRIPTION
1.	Dash Board	<p>Based on the expiry audit data report the dashboard should display</p> <ul style="list-style-type: none"> <li>○ Expired products audit adherence</li> <li>○ Short expiry product audit adherence</li> </ul>
2.	Expired products audit adherence	<ul style="list-style-type: none"> <li>– The expired product audit adherence should display month wise reports for unit. For a particular unit, month wise should display the audit adherence value in percentage wise.</li> <li>– If the unit contain single expired product, then the adherence value should be 0% for month wise of unit should display in dash board.</li> <li>– If the unit does not contain any expired product then it should display the adherence value as 100% for month wise in dash board.</li> </ul>
3.	Short expiry product audit adherence	<ul style="list-style-type: none"> <li>– If the product is less than two month then it will consider as short expiry product audit adherence.</li> <li>– If the unit contain single short expiry product, then the adherence value should be consider as 0% for month wise of the unit should display in dashboard.</li> <li>– If the unit does not contain any short expiry product then it should display the adherence value as 100% for month wise in dash board.</li> </ul>

**4. EXPIRY DISCARD AUDIT:**

S.NO	MENU	DESCRIPTION
1.	Dash board	<p>Based on the data report of expiry discard audit the dashboard should display.</p> <ul style="list-style-type: none"> <li>○ Expiry discard audit.</li> </ul>
2.	expiry discard audit	<p>Based on four parameter dashboard should display yes or no check list</p> <ul style="list-style-type: none"> <li>– The Expiry Discard audit should screen the location such as Adayar, Palavakkam, Anna Nagar, Etc...</li> <li>– The Audit score has to be done on monthly basis.</li> <li>– If found expired then it has to be audited with the help of audit scores.</li> <li>– The Audit score will be provided on the basis of below parameters, <ul style="list-style-type: none"> <li>○ All expired products segregation and geo stamped image upload.</li> <li>○ Business Head approval for expired product discard</li> <li>○ Expiry product discard were not done for all the products.</li> <li>○ Expired products discarded video upload along with the expired products list.</li> </ul> </li> <li>– The above parameter has to be provided a split up of 25% in audit score with Yes/No type. Which should be added at each level of audit parameters if yes and if no is selected then the audit score remains the same.</li> <li>– If found <b>Not expired</b> then it has to be audited with the help of audit scores.</li> <li>– The Audit score will be provided on the basis of below parameter</li> </ul>

		<ul style="list-style-type: none"> <li>○ Acknowledgement of no expired products.</li> <li>– The above parameter has to be provided with 100% as audit score with Yes/No type. Which should be added at each level of audit parameters if yes and if no is selected then the audit score remains the same (i.e. 0%).</li> </ul>
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#### 5. VETBUDDY REPORT:

S.NO	MENU	DESCRIPTION
1.	Dashboard	<p>The vet buddy reports are should audit and it should display in dashboard based on count wise and percentage wise.</p> <p><b>Count wise</b></p> <ul style="list-style-type: none"> <li>• count of data accuracy</li> <li>• Count of internal memo</li> <li>• Count of date</li> <li>• Count of provider name</li> <li>• Count of billing accuracy</li> <li>• Count of appointment booking</li> <li>• Count of lab report</li> <li>• Count of medical note data.</li> </ul> <p><b>Percentage wise</b></p> <ul style="list-style-type: none"> <li>• Vet buddy software audit%</li> <li>• Next appointment booked percentage</li> <li>• Data accuracy</li> <li>• Billing accuracy</li> <li>• Internal memo</li> </ul>

		<ul style="list-style-type: none"> <li>• Lab report</li> <li>• Provider name</li> <li>• Review date – customer remainder</li> <li>• Medical note – customer remainder</li> </ul> <p><b>Performance wise</b></p> <p><b>Employee wise total number of violation</b></p>
2.	<p>count wise</p> <ul style="list-style-type: none"> <li>• count of data accuracy</li> <li>• Count of internal memo</li> <li>• Count of date</li> <li>• Count of provider name</li> <li>• Count of billing accuracy</li> <li>• Count of appointment booking</li> <li>• Count of lab report</li> <li>• Count of medical note data.</li> </ul>	<ul style="list-style-type: none"> <li>– Count Wise the audit report should be display in dashboard. For data accuracy, internal memo, date, provider name, billing accuracy, appointment booking, lab report, medical note data the adherence and violation value should be display in count wise.</li> <li>– For this separate parameters should display the yes and no count wise value and grand total value also should display. For separate parameters it also should display the adherence percentage value for each separate unit of parameters.</li> </ul>



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3.	<b>Percentage wise</b> <ul style="list-style-type: none"> <li>• Vet buddy software audit%</li> <li>• Next appointment booked percentage</li> <li>• Data accuracy</li> <li>• Billing accuracy</li> <li>• Internal memo</li> <li>• Lab report</li> <li>• Provider name</li> <li>• Review date – customer remainder</li> <li>• Medical note – customer remainder</li> </ul>	<ul style="list-style-type: none"> <li>– Percentage Wise the audit report should be display in dashboard. For vet buddy software audit%, next appointment booked percentage, data accuracy, billing accuracy, internal memo, lab report, provider name, review data –customer remainder and medical note – customer remainders adherence and violation value should be display in percentage wise.</li> </ul>
4.	Performance	<ul style="list-style-type: none"> <li>– Performance should display in dashboard as audit criteria of increasing and decreasing trend and same.</li> <li>– Based on the parameters the increasing and decreasing trend of the separate unit should display in the portal.</li> <li>– Same maintenance is following units also should display based on parameters.</li> </ul>
5.	Employee wise total number of violation	<ul style="list-style-type: none"> <li>– Category wise employee total violation should display in dashboard.</li> <li>– For particular employee category wise violation should display in dashboard based on particular unit.</li> </ul>

**6. NEW LICENSE TRACKER:**

S.NO	MENU	DESCRIPTION
1.	New license tracker	New license tracker is to maintain the MIS report for license status.
2.	Master	<ul style="list-style-type: none"> <li>– The report of the license should be entered in masters are branch, adherence, type of license/registration, obtained, duration of validity, validity date, validity, renewal, license status, deadline, current status, license dealing vendor and document type. This status report should be view in MIS.</li> </ul>
3.	<p>MIS</p> <ul style="list-style-type: none"> <li>✓ Count of license available</li> <li>✓ Count of license status</li> </ul>	<ul style="list-style-type: none"> <li>– <b>Count of license available</b> should view list of unit, for the unit the available (not expired/in force), new requirement/under process (expired/new license), renewal (short expiry/renewal) should be view in count wise.</li> <li>– Then, grand total for the unit should display in count wise. And based on the adherence the percentage should view.</li> <li>– Also for separate available in unit and new requirement, renewal, grand total should display the overall total value as grand total.</li> <li>– <b>Count of license status:</b> should display in MIS report as branch, type of license/registration, renewal, validity month, current status, deadline, license status new, renewal should be display.</li> </ul>

**7. WONDERSOFT DATA AUTOMATION:**

S.NO	MENU	DESCRIPTION
1.	WONDERSOFT	<p>Wonder soft should display in dashboard based on monthly and weekly basis. Based on the audit parameters the dashboard should display.</p> <ul style="list-style-type: none"> <li>– Eight parameters contain a set of rules which that parameters will audit and valid as yes or no in report.</li> <li>– The parameters are                             <ul style="list-style-type: none"> <li>○ Billing cancellation should not be done</li> <li>○ Conversion customer name should be captured along with Vetbuddy ID for all conversion customer Manoj (310)</li> <li>○ Customer Name of Internal Sales should be named clearly as OP, OP1, OT, Saloon, Lab, Office, and CCU. There should not be other words Sanchu, Unit name etc.</li> <li>○ Customer name should be available in customer name column. (there should not be mobile number instead of customer name)</li> <li>○ Doctor name should be Internal Transfer for the Bills starts with IN.</li> <li>○ Doctors name should not be blank and given formats - Walk In, Home Delivery, Internal Transfer</li> <li>○ Internal Sales Value should be matched with purchase value.</li> <li>○ Sales person name should be captured</li> <li>○ There should not be stock in transits</li> </ul> </li> </ul>

		<p style="text-align: center;">more than 36 hrs</p> <ul style="list-style-type: none"> <li>– After analysis the data report remark should display in dashboard.</li> </ul>
2.	<p>Dashboard</p> <ul style="list-style-type: none"> <li>– Activity</li> </ul>	<ul style="list-style-type: none"> <li>– <b>Activity</b> is based on the parameters the audit team will check and enters in report as yes or no.</li> <li>– Based adherence and violation yes or no it should display in dashboard as percentage wise. For a particular parameter of particular unit and also grand total percentage also should display.</li> </ul>
3.	<ul style="list-style-type: none"> <li>– Violation remarks</li> </ul>	<ul style="list-style-type: none"> <li>– The <b>violation</b> in data report for particular unit should display as remark in dashboard</li> <li>– For particular parameter the unit wise should display the remarks in dashboard.</li> </ul>
4.	<ul style="list-style-type: none"> <li>– Parameters</li> </ul>	<ul style="list-style-type: none"> <li>– For all <b>parameter</b> should separately display the yes or no count wise value for each separate unit.</li> <li>– For the adherence and violation value should display the grand total and also should display the percentage for the adherence value.</li> </ul>

## 8. STOCK AUDIT AUTOMATION:

S.NO	MENU	DESCRIPTION
1.	STOCK AUDIT	<ul style="list-style-type: none"> <li>– In daily basis audit will check in count wise of the physical product and share the report. Count physical product for each unit.</li> <li>– If the product is short remarks will update and 100 products will give for each outlet.</li> <li>– Audit will enter the counted, not counted, short, excess. Based on the audit data report the dashboard should display.</li> </ul>
2.	Dashboard 1	<ul style="list-style-type: none"> <li>– Dashboard should display the headers as date of audit, week, location, all given products counted, no of products given for counting, no of product counted, stock count adherence percentage, list of products not counted, stock adherence against inventory, id stock variance observed, whether it is short/ excess, no of product excess, no of product short, stock adherence percentage, excess &amp; short product details, stock variance closure completion, stock audit %after validation and process violation should display in dashboard based on the data audit report.</li> <li>– <b>Open product</b> should display in dashboard with date, unit, location, product code, product name, actual stock, barcode audit, variation, excess/short, remarks, variance remarks and closed on should display in dashboard based on audit report.</li> </ul>
3.	<ul style="list-style-type: none"> <li>• Dashboard 2</li> <li>• <b>Stock adherence percentage</b></li> <li>• <b>Stock count adherence percentage</b></li> <li>• <b>Open product</b></li> </ul>	<ul style="list-style-type: none"> <li>– <b>Stock adherence percentage</b> should display in dashboard as for particular unit monthly wise adherence percentage should display. Also should weekly basis.</li> <li>– <b>Stock count adherence percentage</b> should display in dash board as the stock counted adherence must display in monthly and weekly basis for all particular unit.</li> </ul>

		<ul style="list-style-type: none"> <li>– <b>Open product</b> also should display in dashboard with date, unit, location, product code, product name, actual stock, barcode audit, variation, excess/short, remarks, variance remarks and closed on should display in dashboard based on the audit report.</li> </ul>
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## 9. RECRUITMENT OPEN POSITION TRACKER:

S.NO	MENU	DESCRIPTION
1.	Recruitment	<p>The position to be filled by the unit manager for the vacancy by unit head in portal.</p> <ul style="list-style-type: none"> <li>– The details are department, designation, site, CTC, requirement, required/not required, date of MR, details, given by will filled by <b>unit manager</b>.</li> <li>– Once the requirement raised to unit manager or reporting manager. HR will start to work details.</li> <li>– The details entered by <b>HR side</b> are open position/closed, source of candidate, recruitment plan, start date, deadline, priority, days since MR, remarks, SLA periods, current stats, action, sourced profile, HR shortlisted unit manager, final interview/Deepak, approved, joined, named of person, on roll/quesscorp, joining date, SLA percentage and remarks in master.</li> </ul>
2.	<p>Dashboard</p> <p>Count of designation</p> <ul style="list-style-type: none"> <li>• Open position/closed</li> </ul>	<ul style="list-style-type: none"> <li>– For particular unit should display closed and open position in count wise and grand total value should also display in dashboard for each unit.</li> <li>– <b>Grand total</b> – Total value for closed, open position and grand total will display in grand total value.</li> </ul>
3.	Dashboard	<ul style="list-style-type: none"> <li>– For particular department, source of candidate, requirement plan, sourced profile, HR shortlist profile, current status, deadline, count of open position/closed should display in dashboard based on the data report filled by HR team.</li> </ul>

**10. GROOMING PREHEALTH CHECKUP REPORT:**

S.NO	MENU	DESCRIPTION
1.	Grooming Prehealth Checkup Report	Based on the daily basis the goods and service reports are downloading from the Vetbuddy and maintaining as raw data. The data to be uploaded in daily basis and it should be display in the dashboard.
2.	Dashboard	<ul style="list-style-type: none"> <li>– Dashboard should display category wise value in count wise for each unit.</li> <li>– The categories are total saloon customer, grooming pre health checkup, consultation, not avail consultation and not avail percentage.</li> <li>– The above category wise total value should display count wise based on the unit.</li> </ul>

**11. LOST CUSTOMER CALL BACK REPORTS:**

S.NO	MENU	DESCRIPTION
1.	Masters	<p>For 3 to 4 month not visited customers, making calls and encouraging them to come back for booking appointment.</p> <ul style="list-style-type: none"> <li>– Masters should contain upload option to upload the data and it should be listed in portal as category, unit name, customer id, pet id, customer name, phone number, last visited date, no of days.</li> <li>– It should contain the headers are call status, comments, how is the pet, appointment lead, appointment date, appointment time, appointment service, reason for not booking app in Sanchu and appointment booked in Vetbuddy all should be in drop down option to select manually. Customer commands in input field option to enter manually.</li> <li>– Customer visited, month of customer visit and visited customer revenue should list automatically in portal based on the sales report.</li> </ul>

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		<ul style="list-style-type: none"> <li>– Also should contain download option to download all the data's.</li> </ul>
2.	<p>MIS Dashboard</p> <ul style="list-style-type: none"> <li>• Lost customer call back lead conversion%.</li> <li>• Count of reason for not booking app in Sanchu</li> </ul>	<p>Dashboard should contain filter option for category and date.</p> <p><b>Lost customer call back lead conversion%.</b></p> <ul style="list-style-type: none"> <li>– The dashboard should display both day wise and month wise of lost customer call back lead conversion.</li> <li>– It should display for separate unit wise of the category in count wise value. The categories are total leads given, called , connected, potential lead, appointment booked in Vetbuddy, appointment not booked in Vetbuddy, successful appointment(app visited), visited%, no appointment visited customer, total visited customer, %, successful appointment revenue, total lead conversion revenue should be listed in count wise and for all above list should also listed below average value.</li> <li>– It also should display for both month wise and day wise in dashboard.</li> </ul> <p><b>Count of reason for not booking app in Sanchu</b></p> <ul style="list-style-type: none"> <li>– Count of reason for not booking app should display category wise for particular unit in count wise. It also should display in dashboard as day wise and month wise.</li> </ul>



## 12. SOCIAL MEDIA CALL BACK REPORTS

S.NO	MENU	DESCRIPTION
1.	Masters	<p>Call reports for running ads in social medial like face book, instagram for Sanchu.</p> <ul style="list-style-type: none"> <li>– The data's are collected and upload in the portal and it should list in master.</li> <li>– After upload in portal the headers should contain in masters are date of calling, call status, comments, how is the pet, appointment lead, appointment date, appointment time, appointment service, reason for not visiting Sanchu, customer commands, appointment booked in Vetbuddy and pet id should be in drop down option and it should entered manually in portal.</li> <li>– Customer visited, month of customer visit and visited customer revenue should list automatically in portal based on the sales report.</li> </ul>
2.	<p>Dashboard</p> <ul style="list-style-type: none"> <li>• Social media campaign leads conversion%.</li> <li>• Social media campaign – reason for not booking appointment</li> </ul>	<p>Dashboard should display both day wise and month wise of Social media campaign leads conversion% and Social media campaign – reason for not booking appointment.</p> <p><b>Social media campaign leads conversion%.</b></p> <ul style="list-style-type: none"> <li>– Dashboard should display count of all categories based on the unit.</li> <li>– It should display separate unit wise and the categories of unit should display in count wise in portal.</li> <li>– The unit and the categories are total leads from social media, total called customer, total reached customer, potential lead, appointment booked by call center, successful appointment (App visited), visited%, customer visited without, total visited customer, total lead conversion and lead conversion revenue in Rs should display in count and the average should display for all categories.</li> </ul> <p><b>Social media campaign – reason for not booking appointment</b></p>

		<ul style="list-style-type: none"> <li>– Dashboard should display count of all categories based on the unit.</li> <li>– It should display all units and categories are dissatisfied, distance, just enquired, language barrier, no pet, not required and total in count wise should display. And also should display total of each categories in portal.</li> <li>– It should both day wise and month wise in portal.</li> </ul>
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**13. FEEDBACK CALLS APPOINTMENT LEAD REPORTS:**

S.NO	MENU	DESCRIPTION
1.	Masters	<p>The whatsapp feedback has to be requested and received along with the confirmation of next appointment of Yesterday's visited customers.</p> <ul style="list-style-type: none"> <li>– The visited customer's data to be uploaded in portal and the status to be entered manually in portal.</li> <li>– The status is mode of confirmation and appointment status in drop down option to be selected and should list in portal.</li> <li>– Also the status of call feedback will be fetch automatically from the call reports in nps should display in portal.</li> <li>– Customer visited, month of customer visit and visited customer revenue should list automatically in portal based on the sales report.</li> </ul>
2.	dashboard	<p>Dashboard should display both day wise and month wise of feedback appointment confirmation.</p> <ul style="list-style-type: none"> <li>– Dashboard should display count of all categories based on the unit.</li> <li>– It should display all units and categories are total customer, total called, total, potential, appointment, successful, visited, customer, total, total lead, lead, success appointment revenue in count wise and total value of each categories of unit value should display.</li> </ul>

#### 14. NEXTDAY APPOINTMNET REMINDER CALL BACK REPORTS

S.NO	MENU	DESCRIPTION
1.	Masters	<p>Making remainder call for tomorrow visiting customers. The next day appointment data to be upload in the portal and it should display in it.</p> <ul style="list-style-type: none"> <li>– After uploading the data the details should entered manually in drop down to be selected and listed are date of calling/Whatsapp, unit, appointment confirmation, mode of confirmation, call status, comments, reason for not visiting/ reschedule, appointment time &amp; date, comments in visited.</li> <li>– For not visited - date of calling, call status, reason, appointment status, appointment and date, comments, visited status, appointment details, type, category and month to be selected in drop down option.</li> <li>– Daily basis the appointment status to be changed automatically and it should upload in the portal.</li> </ul>
	<b>MIS</b> <ul style="list-style-type: none"> <li>• <b>Call center – next day appointment remainder</b></li> <li>• <b>Cancelled appointment – reason for not visiting the appointment unit wise.</b></li> </ul>	<p>Dashboard should display both day wise and month wise of next day appointment remainder and not visiting appointment.</p> <p><b>Call center – next day appointment remainder</b></p> <ul style="list-style-type: none"> <li>– Dashboard should display count of all categories based on the unit.</li> <li>– It should display all units and categories are total next day appointment remainders, total called customer, total reached customer, appointment booked by call center (VETBUDDY), successful appointment (APP visited), visited in %, customer visited without appointment after calls made, total visited customer, total lead conversion, lead conversion revenue in Rs, total revenue in count wise should display and over all average percent</li> </ul>

		<p>should display below.</p> <ul style="list-style-type: none"> <li>– It should display both day wise and month wise in dashboard.</li> </ul> <p><b>Cancelled appointment – reason for not visiting the appointment unit wise.</b></p> <ul style="list-style-type: none"> <li>– Dashboard should display count of all categories based on all unit. The categories are appt not booked, call not attended, competitor, completed, Lang barrier, self service, customer unavailable and grand total to be display count wise based on unit.</li> <li>– It should display both month wise and day wise in portal.</li> </ul>
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#### 15. APPOINTMENT CANCELLATION CALLS BACK REPORTS:

S.NO	MENU	DESCRIPTION
1.	Masters	<p>The canceled and no show customer list are uploaded and listed in portal.</p> <ul style="list-style-type: none"> <li>– Masters should contain uploaded list and the headers to be selected In drop down options are call status, reason, call back appt status, competitor, next appointment date, next appt time and customer comments are entered manually in portal.</li> <li>– Customer visited, month of customer visit and visited customer revenue should list automatically in portal based on the sales report.</li> </ul>
2.	<p>MIS Dashboard</p> <ul style="list-style-type: none"> <li>• call center - cancelled appointments</li> <li>• cancelled appointment - reason for not visiting the appointment unit wise</li> </ul>	<p>Dashboard should display both day wise and month wise of cancelled appointments and reason for not visiting the appointment for unit wise.</p> <p><b>call center - cancelled appointments:</b></p> <ul style="list-style-type: none"> <li>– Dashboard should display count of all categories based on the unit.</li> <li>– It should display all units for all categories are total cancelled appointments, total called customer, total reached customer, appointment booked by call center</li> </ul>

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		<p>(Vetbuddy), successful appointment (APP visited), visited in %, customer visited without appointment after calls made, total visited customer, total lead conversion, lead conversion revenue in Rs, total revenue. All the above categories should be display in count wise for each unit and overall average percent should display below.</p> <ul style="list-style-type: none"> <li>– It should also display both day wise and month wise in dashboard.</li> </ul> <p><b>cancelled appointment - reason for not visiting the appointment unit wise:</b></p> <ul style="list-style-type: none"> <li>– Dashboard should display count of all categories based on all unit. The categories are call not attended, completed, appt not booked, Lang barrier, unavailable, competitor, self service and grand total. These categories to be display count wise based on unit.</li> <li>– It should display both month wise and day wise in portal.</li> </ul>
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**16. TREATMENT SUCCESS:**

S.NO	MENU	DESCRIPTION
1.	Treatment Success	<p>Based on the NPS raw data the treatment success data to be derive and should display in portal</p> <ul style="list-style-type: none"> <li>From raw data if, <b>service</b> contains <b>consultation</b> and it filtered and the list will automatically display in portal.</li> <li>If the <b>recommend</b> status is <b>promoters</b> in raw data status and it should be display as treatment success in portal.</li> <li>From the sale report <b>goods</b> status contain <b>prescription RX</b>, then it only should filter and display in portal.</li> <li>From <b>sub category</b> in raw data the <b>treatment and NS</b> should filtered and automatically display in portal.</li> <li>In raw data <b>the mode of confirmation and appointment status</b> should auto mapped and display in portal.</li> </ul> <p>– The headers of the list should display in treatment success are s.no, customer number, visited on, time, status, to , duration, unit name, customer name, pet name, pet id, service name, service, date, species, customer id, date &amp; ud &amp;service, fc, fc status, provider, treatment success/not success, recommend, how did you hear about us, department, category, sub category, feedback category, emp name, emp code, competitor, comments, voice file, audit url, month, employee id, employee name, unit rename, cust type, date and pet id, goods, mode of confirmation and appointment status to be display in list wise.</p>
2.	<p>MIS dashboard</p> <ul style="list-style-type: none"> <li>consultation cases - treatment success (Unit Wise)</li> <li>consultation cases - treatment success % (Employee Wise)</li> </ul>	<p><b>consultation cases - treatment success (Unit Wise):</b></p> <p>– Dashboard should display 1 to 19 days unit wise count value for particular categories. The categories are total consultation cases, feedback collected, feedback collect%, treatment success, treatment success%,</p>

		<p>treatment not success, treatment not success%.</p> <ul style="list-style-type: none"> <li>Below it should display total value for all categories of units.</li> </ul> <p><b>consultation cases - treatment success % (Employee Wise):</b></p> <ul style="list-style-type: none"> <li>Dashboard should display 1 to 19 days employee wise count value for particular categories. The categories are total consultation cases, feedback collected, feedback collect%, treatment success treatment success%, treatment not success, treatment not success%.</li> <li>Below should display total value for all categories of units.</li> </ul>
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## 17. EMPLOYEEWISE NPS REPORTS:

S.NO	MENU	DESCRIPTION
1.	Employee wise Nps Reports	<p>Over all feedback collection will handle and maintain in data. From Vetbuddy, last sale reports are download and uploaded in the portal in daily basis.</p> <ul style="list-style-type: none"> <li>The outcome should display in portal as customer number, visited on, time, status, to, duration, unit name, customer name, pet name, pet id, service name, service, date, species, customer id, date and id and service, Fc, Fc stats, provider, how was the service, recommend, how dis, department, category, sub category, feedback category, emp name, emp code, competitor, comments, voice file, audio url, month, employee id, unit rename, customer type should display in the portal from the uploaded raw data.</li> <li><b>FC and FNC</b> should display based on the comments in data. If the comments called then its FC if not called then automatically the status should change as FNC.</li> <li><b>Customer id</b> should display automatically</li> </ul>

		<p>based on the raw data.</p> <ul style="list-style-type: none"> <li>– <b>Month, unit name, customer</b> type should display automatically based on the data.</li> </ul>
2.	Month wise	<p>Based on the <b>how was the service in employee rating</b> in outcome report should display the month wise report for promoters, passive and detractors should display.</p> <ul style="list-style-type: none"> <li>– Month wise should display s.no, unit name, Vetbuddy employee name, employee name, employee id and department for this data the promoters, passive and detractors' value should display as count value for month wise.</li> <li>– It also should display grand total for each promoters, passive and detractors' in count wise value and promoters, passive, detractors percentage value also should display.</li> <li>– NPS value should display in percentage wise.</li> <li>– If passive and detractors value is 0 then the percentage of NPS Value should display as 100%</li> <li>– NPS value should display based on promoters – detractor.</li> <li>– The month wise should display with the headers are s.no, unit name, vet emp name emp name, emp id, department, promoters, passives, detractors, grand, promoters%, passives%, detractor%, NPS% and over all percentage should display.</li> </ul>
3.	Day wise	<p>Based on the <b>how was the service in employee rating</b> in outcome report should display the day wise report for promoters,</p> <ul style="list-style-type: none"> <li>– Day wise should display s.no, unit name, Vetbuddy employee name, employee name, employee id and department for this data the promoters for weekly comparism value should display as count value for day wise.</li> <li>– It also should display total promoters for each day in count wise value and.</li> <li>– NPS value should display in percentage</li> </ul>



		<p>wise based on the promoters</p> <ul style="list-style-type: none"> <li>– The day wise should display with the headers are s.no, unit name, vet EMP name emp name, emp id, department, promoters, NPS% and days for a week.</li> <li>– Monthly comparism and weekly comparism should display in portal</li> </ul>
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## 18. UNITWISE NPS REPORTS:

S.NO	MENU	DESCRIPTION
1.	Unit wise Nps Reports	<p>Over all feedback collection will handle and maintain in data. From Vetbuddy, last sale reports are should download and uploaded in the portal for daily basis.</p> <ul style="list-style-type: none"> <li>– Based on the raw data the unit wise NPS should display in dashboard.</li> </ul>
2.	<p><b>Dashboard</b></p> <ul style="list-style-type: none"> <li>• Customer Wise Unit</li> <li>• Service Wise – Nps</li> <li>• Service Bills And Total Feed Back Collected – Department Wise</li> </ul>	<p><b>Customer Wise Unit</b></p> <ul style="list-style-type: none"> <li>– The customer wise data for each outlet has to be categorized based on Total Customer, FC(calls, whatsapp), FNC(FNG, call not attended, not called), feedback collection%(total fc%, call fc%, whatsapp fc%), NPS(detractors, passives, promoters, detractors%, passives%, promoter%) and NPS%. All should display the count wise of each value.</li> <li>– Below should contain grand total value for each category.</li> </ul> <p><b>Service Wise – Nps:</b></p> <ul style="list-style-type: none"> <li>– Service wise the data for each outlet has to be categorized based on total service bills, FC(calls, whatsapp), FNC(FNG, call not attended, not called), feedback collection%(total fc%, call fc%, whatsapp fc%), NPS(detractors, passives, promoters, detractors%, passives%, promoter%) and NPS%. All should display the count wise of each value.</li> <li>– Below should contain grand total value for each category.</li> </ul> <p><b>Service Bills And Total Feed Back Collected –</b></p>

		<p><b>Department Wise:</b></p> <ul style="list-style-type: none"> <li>– Service bills and total feedback for department wise should display based on the categories the total value for a outlet should display in count wise.</li> <li>– The categories are total service, fc total and for service - boarding, consultation, diagnostics , saloon and for total detractors(detractors, boarding, consultation, diagnostics, saloon ) and for service wise detractors%(total boarding, consultation, diagnostic and saloon) for this count wise and percentage wise the value should display for each outlet.</li> </ul>
3.	<p><b>Detractors</b></p> <ul style="list-style-type: none"> <li>• Unit wise Detractors-Category Wise</li> <li>• Category Wise Detractor-Service Wise.</li> <li>• Department Wise Detractors – Unit Wise</li> <li>• Department Wise Detractors’ – Category Wise.</li> </ul>	<p><b>Unit wise Detractors-Category Wise:</b></p> <ul style="list-style-type: none"> <li>– The detractor’s category wise data for each outlet has to be display in count value for all category of outlet. The category are app wt, customer interaction, hygiene&amp; ambience, lab report, product availability, service grooming, facilities, man power, billing, n-clarity and attitude value for each outlet should display in count wise.</li> <li>– And also grand total value should display in count wise.</li> </ul> <p><b>Category Wise Detractor-Service Wise.</b></p> <ul style="list-style-type: none"> <li>– In category wise the service value should display in count wise. The category are app wt, customer interaction, hygiene&amp; ambience, lab report, product availability, service grooming, facilities, man power, billing, n-clarity and attitude and the service are boarding, consultation, diagnostic, and saloon. For all above category and service the count wise value should display in portal.</li> <li>– And also should display the grand total value for both category and service.</li> </ul> <p><b>Department Wise Detractors – Unit Wise</b></p> <ul style="list-style-type: none"> <li>– The department wise detractors should display for department of each outlet.</li> <li>– The department are veterinary doctor,</li> </ul>

		<p>salon and spa, diagnostics, CRM management, IP boarding, vet assistant. For this department the unit wise the detractors should display in count wise value in dashboard.</p> <p><b>Department Wise Detractors' – Category Wise.</b></p> <ul style="list-style-type: none"> <li>– Department wise and category wise the detractor's value should display count wise in dashboard. Also should display grand total value for both category and department.</li> </ul>
4.	<p><b>Passives</b></p> <ul style="list-style-type: none"> <li>• Unit wise Passives - Category wise</li> <li>• Category wise passives – service wise</li> <li>• Department wise Passives - Unit wise</li> <li>• Department wise Passives- Category wise</li> </ul>	<p><b>Unit wise Passives - Category wise</b></p> <ul style="list-style-type: none"> <li>– Unit wise the passive value should display for category of each unit. The category is app wt, customer interaction, hygiene&amp; ambience, lab report, product availability, service grooming, facilities, man power, billing, n-clarity and attitude for this category the count wise value should display for all units and should display in dashboard.</li> <li>– Also should contain grand total value for unit and category in count wise.</li> </ul> <p><b>Category wise passives –service wise</b></p> <ul style="list-style-type: none"> <li>– Category wise the passive value should display for each service in count wise the value should display.</li> <li>– The category and services mentioned in same above menu it should display in count wise also the grand total should display for both category and service.</li> </ul> <p><b>Department wise Passives - Unit wise</b></p> <ul style="list-style-type: none"> <li>– Department wise the passive value should display in count wise for each unit. And also should display grand total value for both department and unit.</li> </ul> <p><b>Department wise Passives- Category wise</b></p> <ul style="list-style-type: none"> <li>– Department wise the passive value should be display in count wise for each category and also should display grant total value for both department and category.</li> </ul>