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Posted By : Ganesh Sawant

Assigned To : (All Members)

R88

Date & Time : 14-11-2019 04:47:PM

Ganesh Sawant | Client Details and Masters

We have noticed that currently client details master, client TAT, Client Rate are individual masters in the RES and there is no linkage between the same while registering the client in the RES due to which we are facing gap issues. Some time client getting updated in the master but rates and TAT is not getting updated in the master.

Please set the logic that unless the client rate, TAT not updated in the RES, client will not get registered in the RES.

Also please add the below details in the client details master and show the same in the export report.

Eligible for Diwali gift – Yes/No

Eligible for Times Magazine – Yes / No

Eligible for Greeting cards – Yes / No

Please ensure below fields of the Client details master will be mandatory

Client Name

Client Address

Client contact # 1 and 2nd person name, contact #

TAT

Agreement – implementation date, start and end date.

Posted By : Manas Dasgupta

Assigned To : Ganesh Sawant

R88

Date & Time : 15-11-2019 03:56:PM

Ok sir, i will discuss with Sir Kailash regarding this point and let you know as soon as possible.

Posted By : Bhavana Pachpande

Assigned To : Kailash Kumawat

R88

Date & Time : 09-12-2019 08:33:AM

Hello sir,

Please check this point and discuss before any development.

Posted By : Super Admin

Assigned To : Kailash Kumawat

R88

Date & Time : 12-05-2020 05:57:PM

To be replied by Sir Kailash regarding the process as currently we do not have such restriction when adding new client.

Kailash please give your answer by tomorrow, so task can be completed according to priority.

Posted By : Super Admin

Assigned To : Kailash Kumawat

R88

Date & Time : 20-05-2020 10:00:PM

Kailash I am waiting

Posted By : Bhavana Pachpande

Assigned To : Kailash Kumawat

R88

Date & Time : 30-11-2020 08:58:AM

Please share your suggestion for this point.

Posted By : Bhavana Pachpande

Assigned To : Kailash Kumawat

R88

Date & Time : 23-12-2020 12:57:PM

Hello sir,

Please share your suggestion for this point.

Posted By : Bhavana Pachpande

Assigned To : Dipika Yedge

R88

Date & Time : 31-03-2021 03:43:PM

Hello,

Task is added to Task list if not please add it and as such we can discuss for above issue in development and start working on it.

Will require suggestions from Sir Kailash also.

Posted By : Super Admin

Assigned To : Manas Dasgupta

R88

Date & Time : 21-06-2021 08:46:AM

If this is available in excel sheet of priority then close this thread

Posted By : Manas Dasgupta

Assigned To : Ganesh Sawant

R88

Date & Time : 21-06-2021 11:04:AM

Hello sir,

As per above post from Sir Siddharth, please close this thread as it is present in task list.

Posted By : Super Admin

R88

Date & Time : 21-06-2021 12:40:PM

Requirement is closed.

Posted By : Prasad Gawade

Assigned To : Super Admin

R88

Date & Time : 09-11-2022 03:02:PM

Hello maam as discussed -

3 Fields needs to be added in client master :

Eligible for Diwali gift – Yes/No

Eligible for Times Magazine – Yes / No

Eligible for Greeting cards – Yes / No

Doubts:

1) The above fields will be drop down fields or any other type other than that ?

2) Are above fields required ?

2) Is this change only for India or both countries ?

Posted By : Dipika Yedge

Assigned To : Prasad Gawade

R88

Date & Time : 09-11-2022 03:15:PM

1) The above fields will be drop down fields or any other type other than that ?- Dropdrown

2) Are above fields required ?- Yes

2) Is this change only for India or both countries ?- For India

Posted By : Prasad Gawade

Assigned To : Dipika Yedge

R88

Date & Time : 09-11-2022 03:23:PM

OK maam noted.

Posted By : Bhavana Pachpande

Assigned To : Dipika Yedge

R88

Date & Time : 09-11-2022 04:43:PM

Hello mam,

Changes are uploaded on demo server, please check and confirm.

Posted By : Dipika Yedge

Assigned To : Bhavana Pachpande

R88

Date & Time : 10-11-2022 12:49:PM

Hi Prasad,

Please remove mandatory mark from above fields.

And add below fields in export.

Agreement Date

Expiry Date of Agreement

Eligible for Diwali gift

Eligible for Times Magazine

Eligible for Greeting cards

Posted By : Bhavana Pachpande

Assigned To : Prasad Gawade

R88

Date & Time : 10-11-2022 12:50:PM

Hello Prasad,

Please do the needful as above.

Posted By : Prasad Gawade

Assigned To : Bhavana Pachpande

R88

Date & Time : 10-11-2022 01:25:PM

Ok maam noted.

Posted By : Prasad Gawade

Assigned To : Bhavana Pachpande

R88

Date & Time : 11-11-2022 12:04:PM

Hello ma'am,

As discussed, we don't need following fields in client master list page, but we need it in export to excel file :

- Agreement Date
- Expiry Date of Agreement
- Eligible for Diwali gift
- Eligible for Times Magazine
- Eligible for Greeting cards

Because as per current process we need to add field in list page, in order to add those field in export to excel file.

Started working on the same :

To show the fields in excel file and not in list page.

Posted By : Bhavana Pachpande

Assigned To : Dipika Yedge

R88

Date & Time : 11-11-2022 01:24:PM

Hello mam,

Changes are uploaded on demo server, please check and confirm.

Posted By : Dipika Yedge
Assigned To : Bhavana Pachpande
R88
Date & Time : 11-11-2022 01:48:PM
Hi,

Please upload the changes on live server.

Posted By : Bhavana Pachpande
Assigned To : Dipika Yedge
R88
Date & Time : 15-11-2022 12:46:PM
Hello mam,

Changes are uploaded on live India server, please check and confirm.

Posted By : Dipika Yedge
Assigned To : Bhavana Pachpande
R88
Date & Time : 15-11-2022 02:12:PM
Hi,

Its showing proper.

Posted By : Bhavana Pachpande
Assigned To : Dipika Yedge
R88
Date & Time : 17-11-2022 12:40:PM
Please close this point if done.
Posted By : Bhavana Pachpande
Assigned To : Ganesh Sawant
R88
Date & Time : 21-11-2022 02:52:PM
Hello sir,

Please close this point if done.

Posted By : Ganesh Sawant
R88
Date & Time : 28-02-2023 03:31:PM
Requirement is closed.