TWL Vendor software Process flow

Function

Teamspace manages the onboarding process for Client, here the client recruits the candidates and share onboarding details and scanned copy of documents with team space. Based on the correctness of the data QMS code is generated and informed to client.

The Activity of TeamSpace is to maintain the master details of on boarded candidates and match the month wise tentative payout given by the client with the master data giving the client a match and unmatched list .in the matched list calculation of tds is done by the system in the excel as a additional column.

Process flow

- Client shares the details of on boarded candidates(excel format) and candidates documents e.g. photograph, educational proofs etc (soft copy) with team space
- Maker updates(team space) the available details in the software master data , upload the relevant documents and saves the record for approval
- Approver (team space) gets the record saved by maker in pending authorization verifies the same, approver can modify the details and approves/rejects the record, the rejected record goes back to maker, if the record is approved a QMS code is generated by system with the specific series eg QM0001, NC0001 and displayed
- Once the QMS code is generated , the record is not available for view to maker or checker, any modifications to the existing record can be done by admin(team space) only
- For pay out, client sends the candidate details for whom the payout should be done, in the excel format, the payout data received from client is uploaded subject to QMS code and candidates name matches with the master data. If matched the details of matched records are furnished in the excel format and details of un matched are also given to them with a note that payouts for matched records can be made and for unmatched not to be paid

Step 1 Basic data entry (maker entry)

- A maker enters the candidate information in to the system using 1)bulk data upload option or 2) new record option
- In bulk data upload option multiple candidate records are entered in the system in an excel format (document upload not available).
- Once the upload is completed the records are displayed to maker in the grid for further processing and document upload
- In new record option the data is entered for individual candidates and relevant documents are uploaded.
- Upon completion of data entry and document upload maker saved the record

Step 2 record approval and QMS code generation (approver)

- Records updated by maker are available to checker in the grid form
- Checked selects the edit option from the grid,
- Checker verifies the data and approves the record
- When the record is approved by checker the QMS code is auto-generated with the provided sequence

Step 3 payout (admin)

- Client provides the list of records for payout in the excel format ,with information Sr.No ,Code, Name, DOJ, State, Location, Designation, Base Fees Per Month, No of Days Worked, Paid Base Fees/Eligible Fees, Total Cases, Total Incv, Gross Amount, GST Amount
- The list is uploaded in the system using import option , while importing the payout data, below checks are to be considered
    - CODE and NAME should be matched with master data, if the data is not matched the exception to be marked
    - For matched data further calculation to be done (ops to provide the calculations)
    - Upon calculation the report should be generated including columns provided by client and columns details shared by ops (ops to shared the format)
    - System should allocate month and year column in the report
- Once the payout report is generated the further payout should be processed

Activities /Roles

- Maker
    - Bulk Upload (master data candidate list)
    - Create new records
    - Modify records before the QMS code is generated
    - View records
- Checker
    - Approve record and generate QMS code
    - Modify and approve,
    - reject
- Admin
    - Modify Records and save ,where QMS code is already generated
    - Create Users
    - Generate MIS
    - Manage Masters
    - Manage Payout
- Super admin
    - Generate MIS
    - Assign Roles

Enhancements to be incorporated

- DOB & DOE format, has to be changed to DD MMM YYYY
- we have implemented the facility to upload png, jpeg , bmp, jpg,pdf Documents. the requirement is to include tif format also in the above facility . software team to explore possibility in the current environment (software constraints) and inform.
- In Maker / authorization screen Pan no, Aadhar no & Bank account details inputted by maker should reflect along with attachments to avoid mistakes
- Multiple Document storage options, it is difficult with existing setup
- Code should be start with NC, Presently the QMS code is starting with NC, this will keep changing as per clients instruction
- Post uploading payout data shared by ops, auto calculations to be carried out, ops to share the logic of calculation, fields details that they will provide , fields details that are to be included from software
- A payout list should be generated from software based on the calculations and logic provided by operations . Operations should also provide the TDS % at candidate level in client data file