

AMK Microfinance Institution Plc.



Functional Requirements

CO/AM Schedule

Version 1.1

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Appendix 1

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Revision History and Control

Version Control

Version	Date	Description of Revisions
V 1.0	12/03/21	Initial
V 1.1	22/03/21	Add Tab Switch Report

Prepared By

NAME/POSITION	SIGNATURE	DATE
Im Seyha Software and Business Analyst Manager		

Reviewed By

NAME/POSITION	SIGNATURE	DATE
Lim Seaksrun Deputy Head of Retail Business		

The Functional Requirement Approval

The undersigned person acknowledged that they have reviewed the Functional Requirements and understand its processes and approaches. Any changes to these Requirements will be coordinated with and approved by the undersigned or their designated representatives.

Approved By

NAME/POSITION	SIGNATURE	DATE
Soun Pisey CBO, Credit & Micro Insurance, Executive		

1. Introduction

The Functional Requirements are used to track the necessary information required to effectively define business requirements and other non-technical functional requirements (e.g. Finance, HR, Credit, BCD, etc.) in order to ensure the possibility, sustainability and compliance with AMK's standard.

The Functional Requirement document is created during the planning phase of the Project. Its intended audiences are the project manager, project sponsor, project team, user, management, and any stakeholder whose input or approval into the requirements is needed.

2. Objective

The main objectives for this requirement:

- Create calendar and scheduler tools shall help CO and AM to management the working
- To help the management levels shall view their CO and AM schedule that under their supervise

3. Scope


Implement the Tablet App Features shall be following these below functions:


- Develop a new function for CO or Sales Staff set up s/he daily schedule as:
 - Personal task schedule
 - Loan disbursement schedule by each VB
 - Loan collection schedule by each VB
 - Prospect On Boarding/Promotion schedule by each VB
- Reminder of above schedule
- Upload/Download the CO schedule to tablet switch

Implement the Tab Switch Features shall be following these below functions:

- Create task schedule of loan disbursement, collection and prospect on-board/promotion automatically.
- AM view CO schedule.
- AM create task and schedule to assign to specific CO.
- Set up holidays and weekend as pre-data for CO schedule
- AM shall view their schedule and create their own tasks
- BM, PM, HOR view their CO/ AM schedule that under them supervise
- CO/ AM schedule Task Reports

4. References

Document Name	Resource
Draft specification by Sokhour	 FSD CO Schedule V2.docx

Report and export	 CO Schedule Report and Export.xlsx
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5. Definitions and Abbreviations

CO	: Credit Officer
SCO	: Specialized Credit Officer
AM	: Area Manager
BM	: Branch Manager
PM	: Provincial Manager
CUQM	: Credit Underwriting Manager
HOR	: Head of Region

6. Business Need

6.1. User Accessible

User levers:

- CO
- AM
- BM
- PM
- CUQM
- HoR

6.2. User Privilege

6.2.1. Tablet App New Function

Function	CO/ SCO/ LRO	AM
CO Schedule	Yes	Yes

6.2.2. Tab Switch New Functional

Function	AM	BM	PM	HoR
CO Schedule	Yes (CO Handle)	Yes (CO, AM Handle)	Yes (CO, AM ,BM Handle)	Yes(All)

AM Schedule	Yes (CO Handle)	Yes (CO, AM Handle)	Yes (CO, AM ,BM Handle)	Yes (All)
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7. Functional Requirements

7.1. T24 (Core Banking)

Implement a service (Web service or File) shall allow Tab Switch to get values VB Meeting Date, Data & Frequency.

7.2. Tablet App (Mobile Development)

7.2.1. CO/AM Schedule

Develop a new Tablet App feature named “Schedule” that contain of the functions as blow:

- Calendar and Holiday (Year, Month, and Week)
- Create own schedule
- View and action on the assignments (fetch from the Tab Switch)
- View and action on the collection that generate from server based on T24 CSV file

7.2.1.1. Calendar and Holiday View

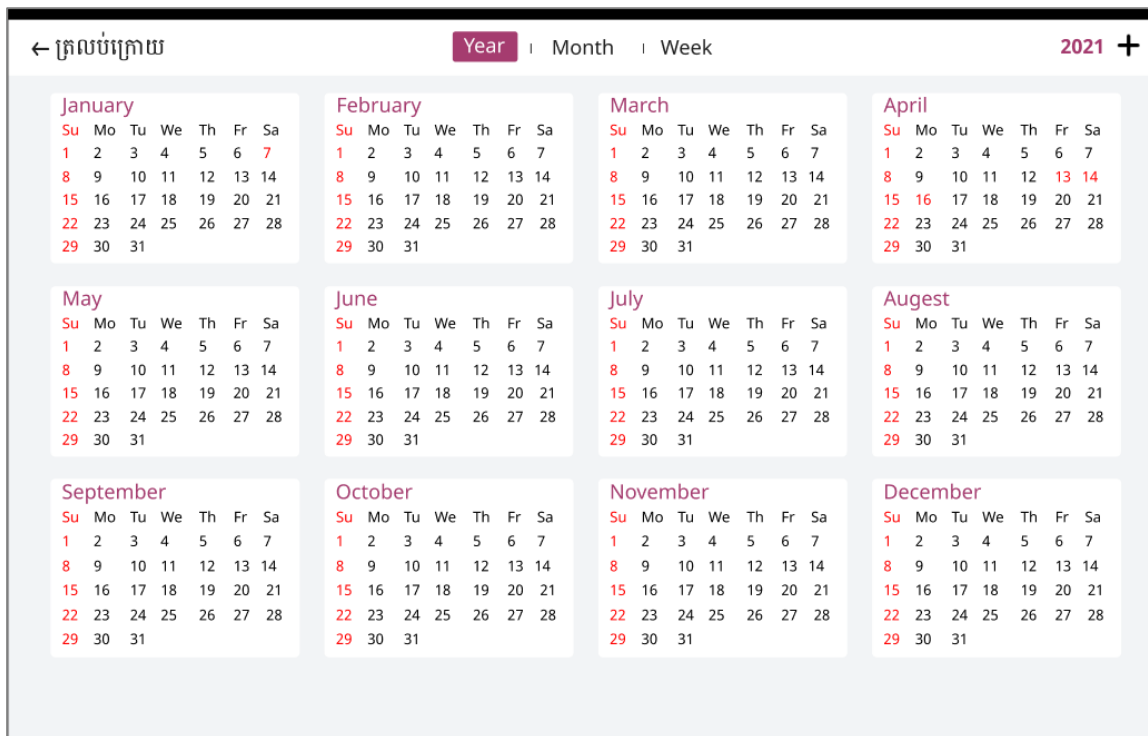
In the Tablet App ➔ Schedule, the user shall display the calendar in 3 formats (Year, Month, Week) as below:

A. Year Format

In the year format calendar shall contain of:

Field Name	Value	Rule
Header		
← ត្រលប់ក្រោយ	Button	Back to the main screen
Year Month Week	Buttons	Buttons shall allow to change the colander display format.
2021	Button	Allow user to chick to show the year picker to change calendar by year selected.

		<div> <div>Year</div> <div> <div>2020</div> <div>2021</div> <div>2022</div> </div> <div> <div>CANCEL</div> <div>OK</div> </div> </div>
+	Button	<p>Allow user to click to show the Add New Schedule Dialog.</p> <div> <div>Add New Schedule</div> <div> <div>Title</div> <div>Input title</div> </div> <div> <div>Description</div> <div>Input description</div> </div> <div> <div>Plan Start</div> <div>hh:mm aa</div> <div>dd-MMM-yy</div> </div> <div> <div>Plan End</div> <div>hh:mm aa</div> <div>dd-MMM-yy</div> </div> <div> <div>Actual Start</div> <div>hh:mm aa</div> <div>dd-MMM-yy</div> </div> <div> <div>Actual End</div> <div>hh:mm aa</div> <div>dd-MMM-yy</div> </div> <div> <div>Owner</div> <div>4001 - Rithy Sok</div> </div> <div> <div>Task Type</div> <div>Select value</div> </div> <div> <div>Task Status</div> <div>Plan</div> </div> <div> <div>Remark</div> <div>Input remark</div> </div> <div> <div>Cancel</div> <div>Save</div> </div> </div>



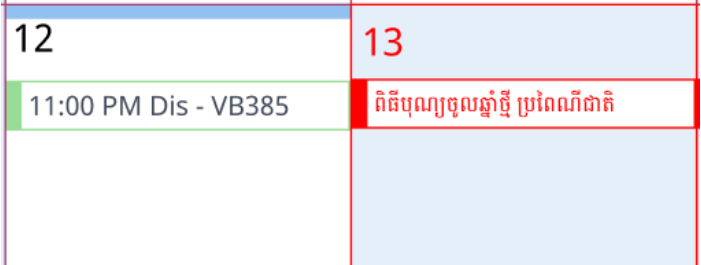


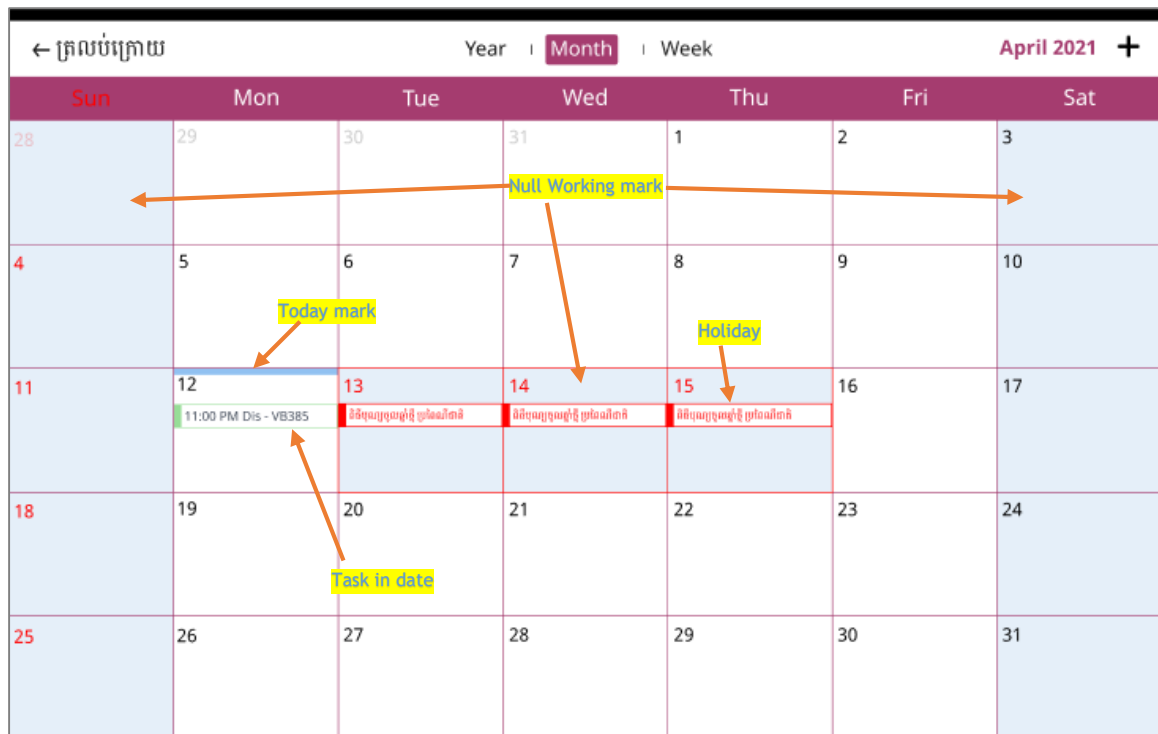
(figure 1: Year calendar format)

B. Month Format

In the Month format calendar shall contain of:

Field Name	Value	Rule
Header		
← ក្រសួងក្រោយ	Button	Back to the main screen
Year Month Week	Buttons	Buttons shall allow to change the calendar display format.
April 2021	Button	Allow user to click to show the month and year picker to change calendar by month selected.

		
+	Button	Allow user to click to show the Add New Schedule Dialog.
Detail Calendar		
Calendar	Calendar view	The calendar of Month selected above. By default, it will display the current month.
Header Day of Week	View	Display the week day. 
Day item detail	List item	In the Day item detail shall contain of: <ul style="list-style-type: none"> - Day - Today Mark - Task in date (Display Start time and Title) - Holiday (Description KH) 



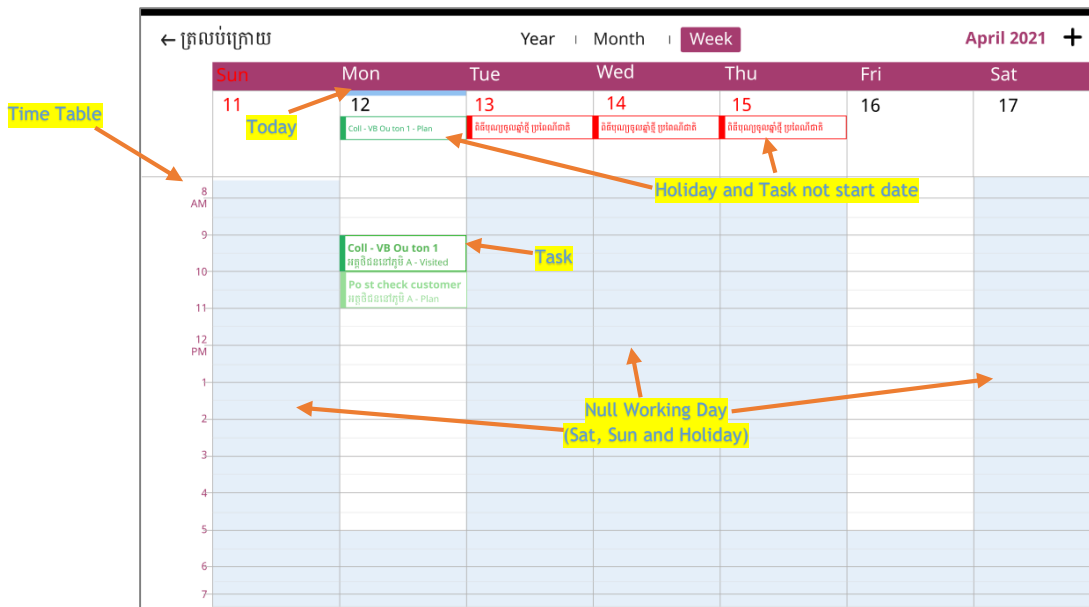
(figure 2: Month calendar format)

C. Week Format

In the Week format calendar shall contain of:

Field Name	Value	Rule									
Header											
← ត្រលប់ក្រោយ	Button	Back to the main screen									
Year Month Week	Buttons	Buttons shall allow to change the calendar display format.									
Mar 2021	Button	Allow user to chlick to show the date picker to change calendar by week selected. <div data-bbox="979 1446 1268 1812"> <p>Date</p> <table> <tr> <td>20</td> <td>Feb</td> <td>2020</td> </tr> <tr> <td>21</td> <td>Mar</td> <td>2021</td> </tr> <tr> <td>22</td> <td>Apr</td> <td>2022</td> </tr> </table> <p>CANCEL OK</p> </div>	20	Feb	2020	21	Mar	2021	22	Apr	2022
20	Feb	2020									
21	Mar	2021									
22	Apr	2022									

+	Button	Allow user to click to show the Add New Schedule Dialog.
Detail Calendar		
Calendar	Calendar view	The calendar of Month selected above. By default, it will display the current month.
Header	View	In this section shall the Display the week day. <div> <div>Sun</div> <div>Mon</div> <div>Tue</div> <div>Wed</div> <div>Thu</div> <div>Fri</div> <div>Sat</div> </div>
Task And Holiday Header	View	In this section shall: <ul style="list-style-type: none"> - Today mark - Task without start date set - Holiday <div> <div>11</div> <div>12</div> <div>13</div> <div>14</div> <div>15</div> <div>16</div> <div>17</div> </div>
Time Table Detail	View	Display contain of the schedule task, and the weekend (sat and sun) and holiday will have mark color. <div> <div>8 AM</div> <div>9</div> <div>10</div> <div>11</div> <div>12 PM</div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> </div>
Task	View	In the schedule task shall contain of: <ul style="list-style-type: none"> - Title - Description + Task Status <div> <div>Coll - VB Ou ton 1</div> <div>អត្តប្រតិទិននៅភូមិ A - Visited</div> </div>



(figure 3: Week calendar format)

D. View Detail Holiday

Develop a function shall fetch the holiday from the server when device has connection (When device not connection, the calendar will show the latest fetched holidays) and show all holiday in the calendar as above figures. The holiday show in the calendar shall allow user to click to view the detail holiday that contain of the Fields as below:

Holiday List		
Description KH	Text	Read only
Description EN	Text	Read only
Start	Date	dd-mmm-yyyy, Read only
End	Date	dd-mmm-yyyy, Read only
Close	Button	Dismiss the popup.

Holiday

Desc KH

ពិធីបុណ្យចូលឆ្នាំថ្មី ប្រពៃណីជាតិ

Desc EN

Khmer New Year Holiday

Start Date

01-Jan-2021

End Date

01-Jan-2021

Close

(figure 4: Detail Holiday)

7.2.1.2. Schedule Task

Develop a function shall sync the user all schedule task with the server when device has connection (When device not connection, the calendar will show the latest sync schedule task) and show all schedule tasks in the calendar as above figures. The holiday show in the calendar shall allow user to click to view the detail schedule tasks.

A. Add New Schedule

In the new screen setup holiday shall contain of the field as below:

Field Name	Mandatory	Value	Rule
Title	Yes	Text input	Maximus 200 chars
Description	Yes	Text input	700 Chars
Plan Start (Time)	No	Time picker	Timer
Plan Start (Date)	Yes	Date picker	
Plan End (Time)	No	Time Picker	
Plan End (Date)	Yes	Date picker	
Actual Start (Time)	No	Time picker	(Read Only)
Actual Start (Date)	No	Date picker	(Read Only)
Actual End (Time)	No	Time picker	(Read Only)
Actual End (Date)	No	Date Picker	(Read Only)
Owner	Yes	Text box	User code and user name login. (Read Only)
Task Type	Yes	Select value: <ul style="list-style-type: none"> - Disbursement - Collection - Prospect On Board 	

		<ul style="list-style-type: none"> - Prospect Promotion - AM Assignment - Personal 	
Task Status	Yes	Select value	Select value "Plan" for add new schedule. (Read Only)
Remark	No	Text input	700 Chars
Cancel	N/A	Button	Dismiss the add schedule popup.
Save	N/A	Button	<ul style="list-style-type: none"> - Add the schedule to the user calendar. - Save condition: if the new meeting date conflict with another user schedule Tablet App will show the conflict schedule popup message. <div> <p>Conflicted Schedule</p> <p>This schedule conflicted with your another Schedule.</p> <p>Close</p> </div>

Add New Schedule

Title

Description

Plan Start

Plan End

Actual Start

Actual End

Owner

Task Type

Task Status

Remark

Cancel

Save

Detail

Title

Description

Plan Start

Plan End

Actual Start

Actual End

Owner

Task Type

Task Status

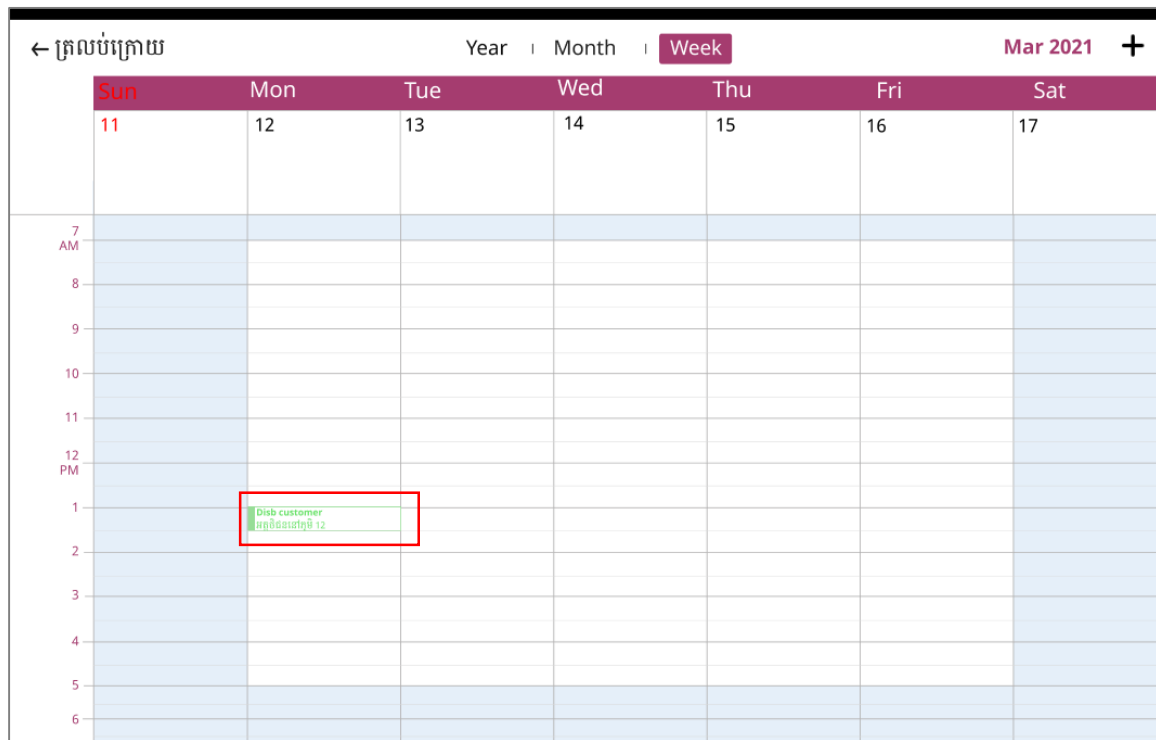
Remark

Cancel

Save

(figure 5: Add new schedule)

After user successfully saved a schedule, the new schedule will appear in the in the calendar as below:



(figure 6: Add new schedule in time table)

B. View/ Edit Detail Schedule

The schedule task on the user calendar shall allow to click to view detail information and display popup from following task status condition below:

- Task Status “Plan”

For the task, that has task status “Plan” shall allow user to view detail information that contain of the field as below:

Field Name	Mandatory	Value	Rule
Title	Yes	Text input	(Read Only)
Description	Yes	Text input	(Read Only)
Plan Start (Time)	No	Time picker	(Read Only)
Plan Start (Date)	Yes	Date picker	(Read Only)
Plan End (Time)	No	Time Picker	(Read Only)
Plan End (Date)	Yes	Date picker	(Read Only)
Actual Start (Time)	No	Time picker	(Read Only)
Actual Start (Date)	No	Date picker	(Read Only)
Actual End (Time)	No	Time picker	(Read Only)
Actual End (Date)	No	Date Picker	(Read Only)
Owner	Yes	Text box	(Read Only)
Task Type	Yes	Select value:	(Read Only)

Task Status	Yes	Select value: - Plan - Visited - Not Visited - Delete - Move Change	User shall allow change value and the popup will change the condition as below.
Remark	No	Text input	(Read Only)
Cancel	N/A	Button	Dismiss the add schedule popup.
Save	N/A	Button	<ul style="list-style-type: none"> - Add the schedule to the user calendar. - Save condition: if the new meeting date conflict with another user schedule Tablet App will show the conflict schedule popup message. <div> <p>Conflicted Schedule</p> <p>This schedule conflicted with your another Schedule.</p> <p>Close</p> </div>

Detail

Title

Disb customer

Description

អត្ថបទនេះមាន 12 ព័ត៌មាន

Plan Start

01:00 PM

12-Mar-2021

Plan End

01:30 PM

12-Mar-2021

Actual Start

hh:mm aa

dd-MMMM-yy

Actual End

hh:mm aa

dd-MMMM-yy

Owner

4001 - Rithy Sok

Task Type

Disbursement

Task Status

Plan

Remark

Input remark

Cancel

Save

(figure 7: View Detail schedule of the Task Status Plan)

Task Status change value:

- Visited, Not Visited, Delete

Field Name	Mandatory	Value	Rule
Title	Yes	Text input	(Read Only)
Description	No	Text input	(Read Only)
Plan Start (Time)	No	Time picker	(Read Only)
Plan Start (Date)	Yes	Date picker	(Read Only)
Plan End (Time)	No	Time Picker	(Read Only)
Plan End (Date)	Yes	Date picker	(Read Only)
Actual Start (Time)	Yes	Time picker	
Actual Start (Date)	Yes	Date picker	
Actual End (Time)	Yes	Time picker	
Actual End (Date)	Yes	Date Picker	
Owner	Yes	Text box	(Read Only)
Task Type	Yes	Select value:	(Read Only)
Task Status	Yes	Select value: <ul style="list-style-type: none"> - Plan - Visited - Not Visited - Delete - Move Change 	
Remark	Yes	Text input	Remark will mandatory when the Task Status Visited, Not Visited and Delete
Cancel	N/A	Button	Dismiss the add schedule popup.
Save	N/A	Button	<ul style="list-style-type: none"> - Add the schedule to the user calendar. - Save condition: if the new meeting date conflict with another user schedule Tablet App will show the conflict schedule popup massage. <div> <p>Conflicted Schedule</p> <p>This schedule conflicted with your another Schedule.</p> <p>Close</p> </div>

Detail

Title

Disb customer

Description

អត្តសញ្ញាណកម្ម 12

Plan Start

01:00 PM

12-Mar-2021

Plan End

01:30 PM

12-Mar-2021

Actual Start

hh:mm aa

dd-MMMM-yy

Actual End

hh:mm aa

dd-MMMM-yy

Owner

4001 - Rithy Sok

Task Type

Disbursement

Task Status

Visited

Remark

Input remark

Cancel

Save

(figure 8: Edit schedule task status “Visit”, “Not Visited” and “Delete”)

- Move Change, the changed task status to Move Change will show and has condition as Task Status “Move Change” below.

- Task Status “Move Change”

All the task status “Move Change” shall show the field and condition as below:

Field Name	Mandatory	Value	Rule
Title	No	Text input	(Read Only)
Description	No	Text input	(Read Only)
Plan Start (Time)	Yes	Time picker	
Plan Start (Date)	Yes	Date picker	
Plan End (Time)	Yes	Time Picker	
Plan End (Date)	Yes	Date picker	
Actual Start (Time)	No	Time picker	(Read Only)
Actual Start (Date)	No	Date picker	(Read Only)
Actual End (Time)	No	Time picker	(Read Only)
Actual End (Date)	No	Date Picker	(Read Only)
Owner	Yes	Text box	(Read Only)
Task Type	Yes	Select value:	(Read Only)
Task Status	Yes	Select value: <ul style="list-style-type: none"> - Visited - Not Visited 	

		<ul style="list-style-type: none"> - Delete - Move Change 	
Remark	No	Text input	
Cancel	N/A	Button	Dismiss the add schedule popup.
Save	N/A	Button	<ul style="list-style-type: none"> - Add the schedule to the user calendar. - Save condition: if the new meeting date conflict with another user schedule Tablet App will show the conflict schedule popup message. <div> <p>Conflicted Schedule</p> <p>This schedule conflicted with your another Schedule.</p> <p>Close</p> </div>

Detail

Title

Disb customer

Description

អត្ថបទសំខាន់ៗ 12

Plan Start

01:00 PM ▼ 12-Mar-2021 🗓

Plan End

01:30 PM ▼ 12-Mar-2021 🗓

Actual Start

hh:mm aa ▼ dd-MMMM-yy 🗓

Actual End

hh:mm aa ▼ dd-MMMM-yy 🗓

Owner

4001 - Rithy Sok

Task Type

Disbursement ▼

Task Status

Move Change ▼

Remark

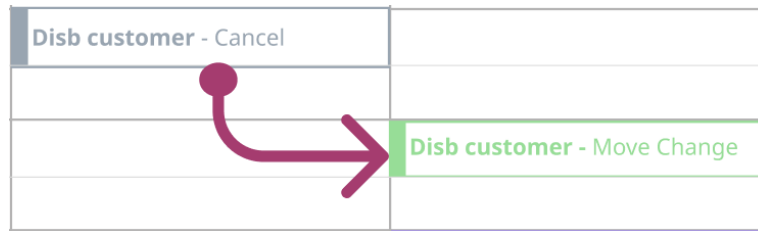
Input remark

Cancel

Save

(figure 9: View Detail schedule of the Task Status Move Change)

After completed save task status “Move change”, the new task shall create and the existing will change status to “Cancel”. Both task shall show on the calendar.



(figure 10: Move Change task)

- Task Status “Visited”, “Not Visited”, “Delete” or “Cancel”

All the task that status is “Visited”, “Not Visited”, “Delete” or “Cancel”, all the detail information is read only.

The figure displays four screenshots of the 'Detail' form for a task titled 'Disb customer'. Each form contains the following fields:

- Title: Disb customer
- Description: អត្ថបទប្រែប្រួល 12
- Plan Start: 01:00 PM, 12-Mar-2021
- Plan End: 01:30 PM, 12-Mar-2021
- Actual Start: 01:10 PM, 12-Mar-2021
- Actual End: 01:12 PM, 12-Mar-2021
- Owner: 4001 - Rithy Sok
- Task Type: Disbursement
- Task Status: (varies by screenshot)
- Remark: Input remark
- Close button

The four screenshots show the Task Status set to 'Visited', 'Not Visited', 'Cancel', and 'Delete' respectively.

(figure 11: View Detail schedule of the Task Status Delete, Visited, Not Visited and Cancel)

7.3. Tab Switch (Portal and Backend)

7.3.1. Setup Holiday

Develop a new function in Tab Switch ➔ User Setting ➔ System Configure named “Setup Holiday”. All the holiday defined will show in the user calendar. In the Setup holiday user shall be able to add new holiday and import holiday from the excel as below figure.

AMK Tab Switch T24 Phase2

Welcome 02816

[Change Password](#) [Sign Out](#)

User Setting ▾ Pre-Post Data Office Setting ▾ AM ▾ Client Register Report ▾

Holiday List

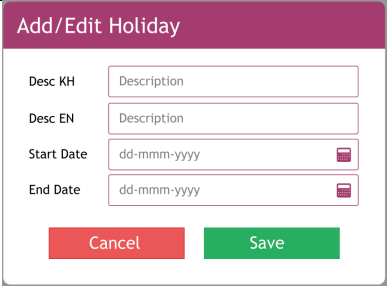
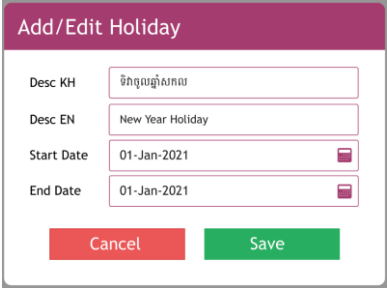
2021 ☒ Add New Import Excel

No	Description KH	Description EN	Start	End	Action
1	ទិវាចូលឆ្នាំសកល	New Year Holiday	01-01-2021	01-01-2021	Edit / Delete
2	ទិវាជ័យជំនះលើរបបប្រល័យពូជសាសន៍	7 Makara	07-01-2021	07-01-2021	Edit / Delete

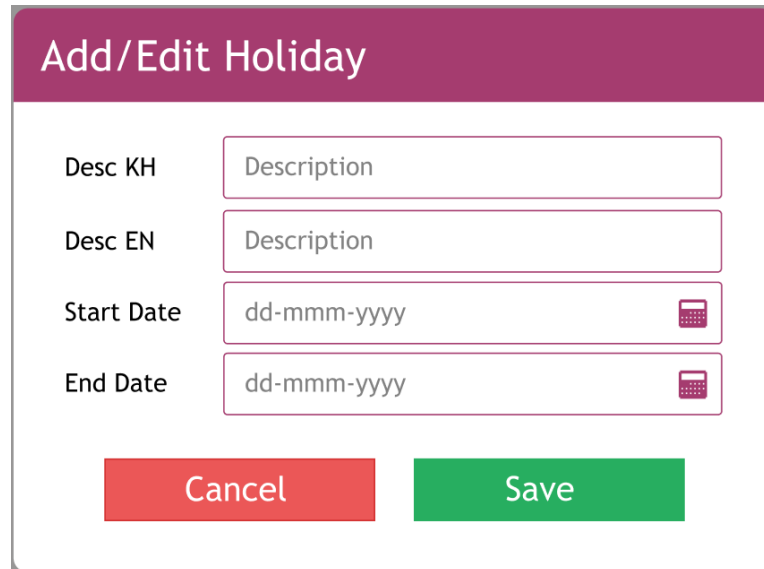
(figure 13: Screen setup holiday)

In the new screen setup holiday shall contain of the field as below:

Field Name	Value	Rule
Year Select	Select box	When the user click on it will show the year select as below: <div> <div><< < 2017-2025 > >></div> <div> <div>2017</div> <div>2018</div> <div>2019</div> </div> <div> <div>2020</div> <div>2021</div> <div>2022</div> </div> <div> <div>2023</div> <div>2024</div> <div>2025</div> </div> <div> <div>Today</div> <div>Clear</div> </div> </div>
Add New	Button	The button shall allow user to add the new holiday to the selected year.

		
Import Excel	Button	The button shall allow user to import a list of holiday selected year. And the importing will show error when the importing holiday conflict to other.
Holiday List		
No	Text	Auto number of list index
Description KH	Text	
Description EN	Text	
Start	Date	dd-mmm-yyyy
End	Date	dd-mmm-yyyy
Action	Hyperlink	<p>The list item action:</p> <ul style="list-style-type: none"> - Delete, delete the item from the holiday list - Edit, show the popup of Add/Edit Holiday and fill up the information 

Add/Edit Holiday Dialog



The image shows a 'Add/Edit Holiday' popup form. It has a purple header with the title 'Add/Edit Holiday'. Below the header, there are four input fields: 'Desc KH' with a placeholder 'Description', 'Desc EN' with a placeholder 'Description', 'Start Date' with a placeholder 'dd-mmm-yyyy' and a calendar icon, and 'End Date' with a placeholder 'dd-mmm-yyyy' and a calendar icon. At the bottom, there are two buttons: a red 'Cancel' button and a green 'Save' button.

(figure 14: Popup Add/Edit Holiday)

Develop a new popup shall allow the user add new, edit or view the holiday that contain of the fields as below:

Field Name	Value	Rule
Desc KH	Text Input	The description KH.
Desc EN	Text Input	The description EN.
Start Date	Date Picker	
End Date	Date Picker	
Save	Button	The button shall click to save the holiday. Save condition: - If the new or edit holiday date conflict with other holiday user unable to save and show error.
Cancel	Button	Dismiss the popup without save.

7.3.2. CO Schedule

Develop a new function in Tab Switch ➔ Setting ➔ Schedule ➔ CO Schedule, the user shall filter CO and show their schedule on the calendar.

7.3.2.1. Filter

Develop the filter that allow user to select CO:

- PM (PM code + | PM | + Branch Name)
- BM (BM code + | BM | + Branch Name)
- AM
- CO

CO Schedule

PM:

1002 | PM | Kondal <div></div>

CO:

2002 | BM | TA Kmoa <div></div>

AM:

3002 | AM |Panha Rit| Active <div></div>

CO:

4002 | CO |Panha| Active <div></div>

Search

(figure 15: Filter and condition)

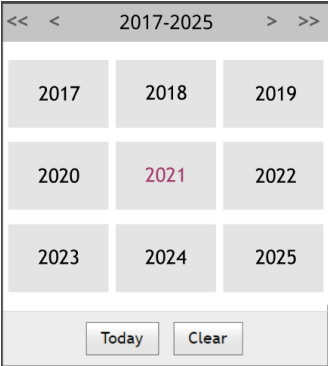
7.3.2.2. Calendar

Tab Switch calendar shall display in 3 format as Tablet App:


- Year Format
- Month Format
- Week Format

A. Year Format

In the year format calendar shall contain of:

Field Name	Value	Rule
Header		
<div style="border: 1px solid black; padding: 5px; display: flex; gap: 10px;"> <div style="background-color: #800040; color: white; padding: 2px 5px;">Year</div> <div> </div> <div>Month</div> <div> </div> <div>Week</div> </div>	Buttons	Buttons shall allow to change the colander display format.
<div style="border: 1px solid black; padding: 10px; display: flex; align-items: center;"> <div style="margin-right: 10px;">2021</div> <div style="background-color: #800040; color: white; padding: 2px 5px;">📅</div> </div>	Year Picker	Allow user to chlick to show the year picker to change calendar by year selected. <div style="margin-top: 10px;">  </div>
<div style="border: 1px solid black; padding: 5px; display: flex; align-items: center;"> <div style="background-color: #800040; color: white; padding: 2px 5px;">New Assign</div> </div>	Button	Allow user to click to show the Add New Schedule for their CO. Section 7.3.2.5
Detail Calendar		

Calendar	Calendar view	The calendar of year selected above. And the item from Jan to Dec.																																										
Item display	Calendar item	<div>Display each month calendar that contain of:</div> <div><div>- Month Name</div><div>- Date</div></div> <div>Holiday and Sunday will display in red color.</div> <div><div>April</div><table><tr><td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td></tr><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr><tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr><tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr><tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr><tr><td>29</td><td>30</td><td>31</td><td></td><td></td><td></td><td></td></tr></table></div>	Su	Mo	Tu	We	Th	Fr	Sa	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
Su	Mo	Tu	We	Th	Fr	Sa																																						
1	2	3	4	5	6	7																																						
8	9	10	11	12	13	14																																						
15	16	17	18	19	20	21																																						
22	23	24	25	26	27	28																																						
29	30	31																																										


AMK Tab Switch T24 Phase2
[Change Password](#)
[Sign Out](#)

Welcome 02816

User Setting

Pre-Post Data

Office

Setting

AM

Client Register

Report

CO Schedule

PM: 1002 | PM | Kondal

CO: 2002 | BM | TA Kmoa

AM: 3002 | AM | Panha Rit| Active

CO: 4002 | CO | Panha| Active

Search

Year

Month

Week

2021

New Assign

January

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

March

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

April

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

May

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

June

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

July

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

August

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

September

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

October

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

November

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				


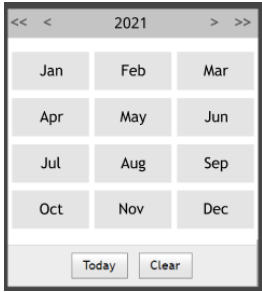

December


Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

(figure 16: Year calendar format of CO schedule on Tab Switch)

B. Month Format

In the Month format calendar shall contain of:

Field Name	Value	Rule
Header		
Year Month Week	Buttons	Buttons shall allow to change the calendar display format.
<div>April 2021 </div>	Button	Allow user to click to show the month and year picker to change calendar by month selected. <div>  </div>
<div>New Assign</div>	Button	Allow user to click to show the Add New Schedule for their CO. Section 7.3.2.5
Detail Calendar		
Calendar	Calendar view	The calendar of Month selected above. By default, it will display the current month.
Header Day of Week	View	Display the week day. <div>  </div>
Day item detail	List item	In the Day item detail shall contain of: <ul style="list-style-type: none"> - Day - Today Mark - Task in date (Display Start time and Title) - Holiday (Description KH) <div> <div> <div>12</div> <div>11:00 PM Dis - VB385</div> </div> <div> <div>13</div> <div>ពិន័យបុណ្យចូលឆ្នាំថ្មី ប្រពៃណីជាតិ</div> </div> </div>



AMK Tab Switch T24 Phase2

Welcome 02816

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User Setting ▾
Pre-Post Data
Office
Setting ▾
AM ▾
Client Register
Report ▾

CO Schedule

PM:

CO:

AM:

CO:

Year |
Month
| Week

April 2021

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5 <div style="font-size: 8px;">11:00 AM Dis - VB385 11:00 AM Dis - VB385</div>	6 <div style="font-size: 8px;">Today mark</div>	7 <div style="font-size: 8px;">11:00 AM Dis - VB385</div>	8	9	10
11	12	13 <div style="font-size: 8px;">Task in date</div>	14 <div style="font-size: 8px;">Null Working mark</div>	15 <div style="font-size: 8px;">Holiday</div>	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

(figure 17: Month calendar form of CO schedule on Tab Switch)

C. Week Format

In the Week format calendar shall contain of:

Field Name	Value	Rule
Header		
Year Month Week	Buttons	Buttons shall allow to change the calendar display format.
<div style="border: 1px solid #ccc; padding: 2px 5px; display: inline-block;">16 Mar 2021</div>	Button	Allow user to click to show the date picker to change calendar by week selected.
<div style="border: 1px solid #ccc; padding: 2px 5px; display: inline-block;">New Assign</div>	Button	Allow user to click to show the Add New Schedule for their CO. Section 7.3.2.5.
Detail Calendar		
Calendar	Calendar view	The calendar of Month selected above. By default, it will display the current month.

Header	View	<div>In this section shall the Day from Sun to Sat.</div> <table><tr><td>Sun</td><td>Mon</td><td>Tue</td><td>Wed</td><td>Thu</td><td>Fri</td><td>Sat</td></tr></table>	Sun	Mon	Tue	Wed	Thu	Fri	Sat																																																																													
Sun	Mon	Tue	Wed	Thu	Fri	Sat																																																																																
Task And Holiday Header	View	<div>In this section shall:</div> <div><div>- Today mark</div><div>- Task without start date set</div><div>- Holiday</div></div> <table><tr><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr><tr><td></td><td>Coll - VB Ou ton 1 - Plan</td><td>អង្គបុគ្គលិក ទី១ ទៅ ប្រមាណ</td><td>អង្គបុគ្គលិក ទី១ ទៅ ប្រមាណ</td><td>អង្គបុគ្គលិក ទី១ ទៅ ប្រមាណ</td><td></td><td></td></tr></table>	11	12	13	14	15	16	17		Coll - VB Ou ton 1 - Plan	អង្គបុគ្គលិក ទី១ ទៅ ប្រមាណ	អង្គបុគ្គលិក ទី១ ទៅ ប្រមាណ	អង្គបុគ្គលិក ទី១ ទៅ ប្រមាណ																																																																								
11	12	13	14	15	16	17																																																																																
	Coll - VB Ou ton 1 - Plan	អង្គបុគ្គលិក ទី១ ទៅ ប្រមាណ	អង្គបុគ្គលិក ទី១ ទៅ ប្រមាណ	អង្គបុគ្គលិក ទី១ ទៅ ប្រមាណ																																																																																		
Time Table Detail	View	<div>Display contain of the schedule task, and the weekend (sat and sun) and holiday will have mark color.</div> <table><tr><td>8 AM</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>9</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>10</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>11</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>12 PM</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>1</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>2</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>3</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>4</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>5</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>6</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>7</td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>	8 AM							9							10							11							12 PM							1							2							3							4							5							6							7						
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7																																																																																						
Task	View	<div>In the schedule task shall contain of:</div> <div><div>- Title</div><div>- Description + Task Status</div></div> <div><div>Coll - VB Ou ton 1</div><div>អត្តប្រាជ្ញនៅភូមិ A - Visited</div></div>																																																																																				



(figure 18: Week calendar format of CO schedule on Tab Switch)

7.3.2.3. View Holiday

Develop a function shall display the detail holiday in the calendar that contain of the field as below:

Holiday List		
Description KH	Text	Read only
Description EN	Text	Read only
Start	Date	dd-mmm-yyyy, Read only
End	Date	dd-mmm-yyyy, Read only
Close	Button	Dismiss the popup.

Holiday

Desc KH

ពិធីបុណ្យចូលឆ្នាំថ្មី ប្រពៃណីជាតិ

Desc EN

Khmer New Year Holiday

Start Date

01-Jan-2021

End Date

01-Jan-2021

Close

(figure 19: Detail Holiday popup on Tab Switch)

7.3.2.4. View CO Task

Develop a function shall display the detail holiday in the calendar that contain of the field as below:

Field Name	Value	Rule
Title	Text	(Read Only)
Description	Text	(Read Only)
Plan Start (Time)	Time	(Read Only)
Plan Start (Date)	Date	dd-mmm-yyyy, (Read Only)
Plan End (Time)	Time	(Read Only)
Plan End (Date)	Date	dd-mmm-yyyy, (Read Only)
Actual Start (Time)	Time	(Read Only)
Actual Start (Date)	Date	dd-mmm-yyyy , (Read Only)
Actual End (Time)	Time	(Read Only)
Actual End (Date)	Date	dd-mmm-yyyy ,(Read Only)
Owner	Text	(Read Only)
Task Type	Text	(Read Only)
Task Status	Text	(Read Only)
Remark	Text	(Read Only)
Close	Button	Dismiss the add schedule popup.

Detail

Title

Coll - VB Ou Tom

Description

3 loans collatect
Total: USD 2,000 - KHR 100,000 - THB 0.0

Plan Start

8:00 AM ▼

12-Apr-2021

Plan End

9:00 AM ▼

12-Apr-2021

Actual Start

hh:mm aa ▼

dd-mmm-yyyy

Actual End

hh:mm aa ▼

dd-mmm-yyyy

Owner

4002 - Panha

Task Type

AM Assignment ▼

Task Status

Plan ▼

Remark

អត្ថបទសម្រាប់ប្រើប្រាស់

Close

(figure 20: Detail Holiday popup on Tab Switch)

7.3.2.5. Assign Task to CO

Develop a function shall allow the assign a task to their CO user following company that contain of the field as below:

Field Name	Mandatory	Value	Rule
Title	Yes	Text input	Maximus 200 chars
Description	No	Text input	700 Chars
Plan Start (Time)	No	Time picker	hh:mm aa
Plan Start (Date)	Yes	Date picker	dd-mmm-yyyy
Plan End (Time)	No	Time Picker	hh:mm aa
Plan End (Date)	Yes	Date picker	dd-mmm-yyyy
Actual Start (Time)	No	Time picker	(Read Only)
Actual Start (Date)	No	Date picker	(Read Only)
Actual End (Time)	No	Time picker	(Read Only)
Actual End (Date)	No	Date Picker	(Read Only)
Owner	Yes	Text box	CO Selected
Task Type	Yes	Select value: - AM Assignment	Values “AM Assignment” selected and Read Only value.
Task Status	Yes	Select value: - Plan	Select value “Plan” for add new schedule. (Read Only)
Remark	No	Text input	700 Chars
Cancel	N/A	Button	Dismiss the add schedule popup.

Assign	N/A	Button	<ul style="list-style-type: none"> - Assign a schedule to their CO - Save condition: if the new meeting date conflict with another user schedule Tablet App will show the conflict schedule popup message. <div> Assignment conflict <p>This assignment conflict with another CO Schedule</p> Close </div>
--------	-----	--------	--

New Assign

Title

Description

Plan Start

Plan End

Actual Start

Actual End

Owner

Task Type

Task Status

Remark

Cancel

Assign

(figure 20: Assign Task to CO on Tab Switch)

7.3.3. Task Generate for CO

7.3.3.1. Collection

Develop a new function on Tab Switch shall daily get the VB meeting date from T24. And generate schedule task for CO who handle the VB that VB meeting date equal today + a month plus.

Ex. Today is 10 Mar 2021, the VB meeting date should bigger than 10 Apr 2021.

Schedule Task Generate following:

Field Name	Value	Rule
Title		"Coll - " + VB Name
Description	Total Loan, Total Amount Ex: 3 loans Total: USD 2,000 - KHR 100,000 - THB 0.0	Total Loan under VB that have next payment date equal VB meeting date.
Plan Start (Time)		
Plan Start (Date)		VB meeting date from T24
Plan End (Time)		
Plan End (Date)		VB meeting date from T24
Actual Start (Time)		
Actual Start (Date)		
Actual End (Time)		
Actual End (Date)		
Owner		CO Code + CO Name
Task Type	"Collection"	
Task Status	"Plan"	
Remark		

7.3.3.2. Prospect

Develop a new function on Tab Switch Create the schedule task for CO after their prospect created successfully on prospect system:

A. Prospect On Board

Create Schedule task for prospect that user input On Board Date/Time “ថ្ងៃណាត់ជួប”:

Field Name	Value	Rule
Title		"Prospect On Board - " + VB Name
Description		
Plan Start (Time)		
Plan Start (Date)		Onboard Date input by CO
Plan End (Time)		
Plan End (Date)		Onboard Date input by CO
Actual Start (Time)		
Actual Start (Date)		

Actual End (Time)		
Actual End (Date)		
Owner		CO Code + CO Name
Task Type	"Prospect On Board"	
Task Status	"Plan"	
Remark		

B. Prospect Promotion

Create Schedule tasks for prospect that user input 1st Promotion Date, 2nd Promotion Date, and 3rd Promotion Date:

Field Name	Value	Rule
Title		"Prospect On Board - " + VB Name
Description		
Plan Start (Time)		
Plan Start (Date)		Promotion Date input by CO
Plan End (Time)		
Plan End (Date)		Promotion Date input by CO
Actual Start (Time)		
Actual Start (Date)		
Actual End (Time)		
Actual End (Date)		
Owner		CO Code + CO Name
Task Type	"Prospect On Board"	
Task Status	"Plan"	
Remark		

7.3.4. AM Schedule

Develop a new function in Tab Switch ➔ Setting ➔ Schedule ➔ AM Schedule, the user shall filter CO and show their schedule on the calendar.

AMK Tab Switch T24 Phase2

Welcome 02816

Change Password Sign Out

User Setting Pre-Post Data Office Setting AM Client Register Report

AM Schedule

PM: 1002 | PM | Kondal
CO: 2002 | BM | TA Kmoa
AM: 3002 | AM | Panha Rit Active

Search

Year Month Week 2021 Add Schedule

January
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31

February
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31

March
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31

April
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31

May
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31

June
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31

July
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31

August
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31

September
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31

October
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31

November
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31

December
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31

(figure 21: AM Schedule)

7.3.4.1. Filter

Develop the filter that allow user to select CO:

- PM (PM code + | PM | + Branch Name)
- BM (BM code + | BM | + Branch Name)
- AM

AM Schedule

PM: 1002 | PM | Kondal

CO: 2002 | BM | TA Kmoa

AM: 3002 | AM | Panha Rit Active

Search

(figure 22: AM Schedule)

7.3.4.2. calendar

Tab Switch calendar shall display in 3 format as Tablet App that shall allow user AM user to Add, View , Edit their schedule in [Section 7.2.1.1.](#)

7.3.5. Notification Reminding Alert

Develop a new function shall alert to Tablet App to reminding user their task not yet complete.

Condition Task:

- Task Status: Plan or Move Change

Notification Alert Condition:

- Notification Before Plan Start 15 Min
- Notification After Plan Start 15 Min (Task status Plan or Move Change)
- Notification After Plan Start 30 Min (Task status Plan or Move Change)
- Notification After Plan Start over 1 Hour (Task status Plan or Move Change)
- Notification After Plan Start over 2 Hours (Task status Plan or Move Change)

8. Reports

8.1. Tab Switch Report

8.1.1. CO Schedule Report

Develop a new report function on the Tab Switch → Report → Schedule Report → AM Schedule Report shall AM, BM , PM or HOR shall view AM schedule that contain of:

- **Filter:**
 - PM: Select specific or select all, Display in select box format PM_code + Branch_Name
 - BM: Select specific or select all, Display in select box format BM_code + Branch_Name
 - AM: Select specific or select all
 - CO: Select specific or select all
 - From Date to Date (Plan Date)
- **Report List:**

Field Name	Value	Rule
No		Auto Number
CO Name	Text	CO_code + CO_name
Task Title	Text	
Task Description	Text	
Task Type	All Task Type: <ul style="list-style-type: none">- Disbursement- Collection- Prospect On Board- Prospect Promotion- AM Assignment- Personal	

Plan Start	Date Time	Hh:mm aa dd-mmm-yyy or dd-mmm-yyy (Task not yet set time)
Plan End	Date Time	Hh:mm aa dd-mmm-yyy or dd-mmm-yyy (Task not yet set time)
Actual Start	Date Time	Hh:mm aa dd-mmm-yyy or dd-mmm-yyy (Task not yet set time)
Actual End	Date Time	Hh:mm aa dd-mmm-yyy or dd-mmm-yyy (Task not yet set time)
Task Status	All Task Status: - Plan - Visited - Not Visited - Delete - Move Change	
Assigned By		1. Task type Collection, Prospect Onboard, Prospect Promotion -> Assigned by: System 2. Task Type Personal, AM Assignment Assigned by: User created task

- **Export to excel**, User shall export all the list data to the excel follow the template as above [Template File](#).

No	CO Name	Task Title	Task Description	Task Type	Plan Start	Plan End	Actual Start	Actual End	Task Status	Assigned by
1	5001-Cha Roth	Coll- VB Oud Ong	អត្ថបទនៃការប្រើប្រាស់ 12, 3 Loans, Total USD 100, 2,000,000 KHR...	Collection	9:00 AM 01-Mar-21	9:30 AM 01-Mar-21	9:00 AM 01-Mar-21	9:10 AM 01-Mar-21	Visited	System
1	5001-Cha Roth	ជួបអតិថិជន	អត្ថបទនៃការប្រើប្រាស់ 20	Personal	9:30 AM 01-Mar-21	10:30 AM 01-Mar-21	9:30 AM 01-Mar-21	10:00 AM 01-Mar-21	Plan	5001-Cha Roth

(figure 23: CO Schedule Report)

8.1.2. AM Schedule Report


Develop a new report function on the Tab Switch ➔ Report ➔ Schedule Report ➔ AM Schedule Report shall AM, BM , PM or HOR shall view AM schedule:

- **Filter:**
 - PM: Select specific or select all, Display in select box format PM_code + Branch_Name
 - BM: Select specific or select all, Display in select box format BM_code + Branch_Name
 - AM: Select specific or select all

- CO: Select specific or select all
- From Date to Date (Plan Date)

- **Report List:**

Field Name	Value	Rule
No		Auto Number
AM Name	Text	CO_code + CO_name
Task Title	Text	
Task Description	Text	
Task Type	All Task Type: <ul style="list-style-type: none"> - Disbursement - Collection - Prospect On Board - Prospect Promotion - AM Assignment - Personal 	
Plan Start	Date Time	Hh:mm aa dd-mmm-yyy or dd-mmm-yyy (Task not yet set time)
Plan End	Date Time	Hh:mm aa dd-mmm-yyy or dd-mmm-yyy (Task not yet set time)
Actual Start	Date Time	Hh:mm aa dd-mmm-yyy or dd-mmm-yyy (Task not yet set time)
Actual End	Date Time	Hh:mm aa dd-mmm-yyy or dd-mmm-yyy (Task not yet set time)
Task Status	All Task Status: <ul style="list-style-type: none"> - Plan - Visited - Not Visited - Delete - Move Change 	
Assigned By		3. Task type Collection, Prospect Onboard, Prospect Promotion -> Assigned by: System 4. Task Type Personal, AM Assignment Assigned by: User created task



AMK Tab Switch T24 Phase2

Welcome 02816

[Change Password](#) [Sign Out](#)

User Setting ▾
Pre-Post Data
Office
Setting ▾
AM ▾
Client Register
Report ▾

AM Schedule Report

PM:

BM:

AM:

From Date: To

No	AM Name	Task Title	Task Description	Task Type	Plan Start	Plan End	Actual Start	Actual End	Task Status	Assigned by
1	3001-Chan Rotha Check- VB 19		අලුතින් සැකසූ 12	Personal	9:00 AM 01-Mar-21	9:30 AM 01-Mar-21	9:00 AM 01-Mar-21	9:10 AM 01-Mar-21	Visited	5001-Cha Roth









(figure 24: AM Schedule Report)

9. UI

URL Link: <https://www.figma.com/file/hFeR0I3yHFia6VRl4qq719/CO-Schedule-and-Loan-Follow-Up?node-id=0%3A1>

10. Appendix

10.1. Task Type and Color Code

Field Name	Color Code	Color display on schedule
Disbursement	#97DD97	
Collection	#5CB85C	
Prospect On Board	#10C3CE	
Prospect Promotion	#CEC010	
AM Assignment	#FF8C00	
Personal	#A895E2	
Holiday	#FF0000	
Cancel (Change Date) or Delete	#99A5B1	

10.2. Task Status

Field Name	Description
Plan	Task actual schedule are not defined yet.
Visited	Actual schedule defined or task completed while uploading to tablet switch.
Not Visited	Actual schedule are blank while uploading to tablet switch.
Move Change	Task change the plan date
Delete	The task removed.

Cancel	
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10.3. New Prospect register fields

Field Khmer Name	Field English Name	Mandatory	Value	Rule
លេខកូដអតិថិជនរំពឹងទុក	Prospect ID	Yes	Equal CO ID with maximum sequence number of prospect plus one. Example CO ID =1231 Max Prospect =25 ⇒ New Prospect ID =1231-26	View only.
ឈ្មោះមន្ត្រីគណនា	CO Name	Yes	Equal CO login Name automatically	View only.
ថ្ងៃចុះឈ្មោះ	Prospect Register Date/Time	Yes	Equal tablet switch date time automatically	View only and display in format as DD/MM/YYYY HH:MM
ណែនាំដោយ	Refer By	Optional	-Dropdown list of values such as VBP and SAP. -Default value is null.	
ឈ្មោះអ្នកណែនាំ	Referrer Name	Optional	Text	If the refer by field is not null, user requires to input the referrer name.
ឈ្មោះអតិថិជនជាខ្មែរ	Pros Customer Khmer Name	Yes	Text Box	Invalid for special character and number except space.
ឈ្មោះអតិថិជនជាឡាតាំង	Pros Customer English Name	Optional	Text Box	Invalid for special character and number except space.
ភេទ	Sex	Yes	ប្រុស, ស្រី Default value is null.	N/A
អាយុ	Age	Yes	Text Box	Valid for integer from 18 till 70 only (>=18 and <=70).
លេខទូរស័ព្ទ	Phone Number	Yes	Text Box	Valid for integer with length of 9 or 10 digits only.
ភូមិ	Village Name	Yes	Dropdown list of village name	User should be able to write to trill down or scroll to select.
ស្ថានភាពអាជីវកម្ម	Business Status	Optional	Dropdown list of values such as ប្តូរ , មិនប្តូរ Default value is null.	

ស្ថានភាពទ្រព្យធានា	Collateral Status	Optional	Dropdown list of values such as រឹងមាំ , មិនរឹងមាំ Default value is null.	
អាចទទួលកម្ចីទេ	Loan Eligible	Optional	Dropdown list of values such as បាន , អត់បាន Default value is null.	
ថ្ងៃផ្សព្វផ្សាយទី១	1st Promotion Date	Optional	Date	If it has value, it must be greater than or equal prospect register Date.
ថ្ងៃផ្សព្វផ្សាយទី២	2 nd Promotion Date	Optional	Date	If it has value, it must be greater than 1 st promotion date.
ថ្ងៃផ្សព្វផ្សាយទី៣	3 rd Promotion Date	Optional	Date	If it has value, it must be greater than 2 st promotion date.
មតិអតិថិជន	Client Comment	Optional	Text	N/A
ថ្ងៃណាត់ជួប	Expected On Board Date/Time	Optional	Date Time Pickup	Must be greater than or equal today.
ស្ថានភាព	Prospect Status	Yes	- If On Board Date/Time is blank, it is equal “Prospected”. - If On Board Date/Time is not blank and not created as customer in T24, it is equal “Going On Board” If On Board Date/Time is not blank and created as customer in T24 it is equal “On Boarded”	View Only.

----- End of Document -----