Comments

Settlement Management
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1) One months settlement information comes from Exchange at a time which we want to 'Bulk upload'. Give us the

format/ structure of the csv file that can be uploaded. I could not upload a csv

2) To delete therefore the last months settlement information, 'Delete All' or multiple delete at one go is

desired.

3) File from Exchanges has date data in dd/mm/yyyy format. But your table has that in yyyy-mm-dd format. Would it

be possible for you to have date data in dd/mm/yyyy format.

4) On clicking 'Edit' or 'Add', the next screen doesn't have 'Cancel' option but only Add/Update (What if you

decide not to edit/ add but return to the last screen)

5) If you click 'Cancel' after 'Bulk Upload', you are automatically taken to User management.

Audit Management
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1) While you are logging all user activities, I will prefer not to log all because
(a) This makes the App size bigger (for extra coding)
(b) Audit table will be big and will have high number of records containing even the information that is not

useful to me.

I will still prefer logging only the following activities
(a) Login successful -> on login (also on opening the App with Remember Me earlier checked)
(b) Forwarded to NOW -> When User taps first option on HomeScreen
(c) Forwarded to Backoffice -> When user taps second option on HomeScreen

(d) <<filename>> viewed -> When user views a file (proceeding with options 3,4 or 5). Logging the name of the file is important because that tells me that the user has read a particular file.
(e) Password Reset -> When user resets his password using context menu

Logging extra information is therefore your call.

User Management

(1) Type and Backoffice password are not compulsory fields.

(2) As earlier requested, "Download All (in csv)" and "Delete All" option is useful to us here. I will give an example, clients were to provide us mobile number by 30th Apr. So on 1st May, 130 clients had to be deactivated. I can't edit 130 clients one by one. So I will 'Download All', edit 130 records in Excel, 'Delete All' in admin panel, and then 'Bulk upload' all.

(3) Can't bulk upload. Please give a sample csv file which can be uploaded.

(4) On clicking 'Edit' or 'Add', the next screen doesn't have 'Cancel' option but only Add/Update (What if you decide not to edit/ add but return to the last screen)

Ticker Table

(1) On clicking 'Edit' or 'Add', the next screen doesn't have 'Cancel' option but only Add/Update (What if you decide not to edit/ add but return to the last screen)

(2) Need a column 'DateTimeUploaded'. This column is autopopulated with the current time on add (no change on

editing). This columns is required for us to know what was being displayed through App from time to time.

(3) App is currently not reading data from the Ticker table

Message Management
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(1) 'Bulk send' required. Say we want to give a stock market tip 'Buy TISCO' today to selected 200 clients. In

that case, the Admin panel should ask for 'Message text' and a csv file containing the UCCs of these 200 clients.

On 'bulk send', this same message goes to the selected 200 clients.

(2) Table displays 'UserName'. 'UCC' is more relevant to us.

(3) We would like to incorporate use of html tags in the messages (if possible).

(4) DateTimeSent and DateTimeRead columns are not being displayed.

(5) 'Download All' option is missing for our MIS purposes.

Complaint Management
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(1) UCC and not "User Name" is relevant to us.

(2) Columns 'DateTimeSubmitted' and 'ReplyDateTime' (both autopopulated) are missing. They are required for MIS

(3) 'Download All' option is missing. This report (in csv) is to be used for MIS purposes.