

Requests List

Sales

1. (Manager, Sales User) Rework “Event” Tab
2. (Sales User) Show “Event” Tab to all sales users
3. (Sales User) Disable chức năng edit Business Unit và Budget Month của User, only Manager có quyền edit từ Master file
4. (Sales User) Show “KPIs/Enquire KPIs” Tab all sales users
5. (Sales User) khi sales user resign hoặc terminate khỏi hệ thống, tất cả entries trong NCL (Blocked, LOI, Live) đều bị chuyển qua expire, để existing sales user tiếp tục sell. Auto merge tất cả personal No Call List vào Company Resources
6. (Manager, Sales User) Rework “KPIs/Consolidated KPIs” Tab
7. (Manager, QC, HR) Rework “User” Tab
8. (Manager) Include Interview Summary vào User Profile sau khi Manager approve employment
9. (Manager, Sales) Show detailed of past booking trong Tier 1 Company (Event Name, Event Code, Event Date, Delegate Name, Delegate Email, Delegate Contact, Attendance Status)
10. Trong Manager/Company Resources, tạo 01 chức năng search emails theo filter (Job title, Location) and export emails from clients, chức năng này giúp Manager có 1 list email theo yêu cầu cụ thể nhanh nhất
11. (Sales) Show “Approved Booking” tab cho sales User
12. New Event Request

HR

13. (Manager, HR) Rework “Candidate” Tab
14. (HR) ẩn “Master files” Tab ở HR User
15. (Manager, HR) hiện KPIs tab dành riêng cho HR

Finance

16. (Manager, Finance) Create Invoice, chọn được Invoice Number, Date of Issue

Admin

17. (Manager) Template
18. (Manager) Non downloadable Template

Sales

1. Rework Event Tab

- Tạo 01 column “Category” trước Event Name. Đây là cột phân loại nội dung Event
- Trong Manager/Master Files, tạo 01 field “Event Category”. Trong field này Manager có quyền add thêm Event Category theo từng key word , ví dụ Leadership, Engineering,...
- Trong Manager/Event/Add New/Create Event, tạo 01 field “Event Category” nằm sau field “Event Status”. Event Category này là 1 drop downlist để chọn dc Category đã được set từ Master Files, sau khi select được Event Category và Save, nội dung sẽ hiện ra ở column 1.a bên trên
- Trong Manager/Event/Add New/Create Event, tạo 01 field “Event Summary” on the same row with field “Location”. Field “Event Summary” sẽ hiện ra ở tab Event Details trong Event List

Prime QT

Events

+ ADD NEW

Show 50 entries

Search: Search...

Code	Status	Name	Color	Event First Day	Event Last Day	Date Of Confirmation	Date Of Closing Sales	Location	Hotel Venue
IH27124	Live	Practical Hazardous Waste Management		01/01/2019	31/01/2019			Abidjan, Ivory Coast	
IH27023	Live	Transformational Leadership & Change Management		07/01/2019	09/01/2019	10/12/2018	10/12/2018	Ho Chi Minh, Viet Nam	
IH27021	Completed	IH Transformational Leadership & Change Management		05/11/2018	07/11/2018	14/09/2018	14/09/2018	Accra, Ghana	
IH27020	Completed	IH Crisis Management & Emergency Response		27/09/2018	28/09/2018	25/09/2018	25/09/2018	Gaborone, Botswana	
IH27019	Completed	IH Crisis Management & Business Continuity Planning		26/09/2018	26/09/2018	25/09/2018	26/09/2018	Gaborone, Botswana	
IH27018	Completed	IH Crisis Management & Business Continuity Planning		24/09/2018	25/09/2018	14/09/2018	14/09/2018	Lagos, Nigeria	

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Prime QT

Add Event

Event Code*

Event Status* Please select

Event Color

Event Name*

Event First Day* 19/01/2019

Event Last Day* 19/02/2019

Date Of Confirmation dd/mm/yyyy

Date of Closing Sales dd/mm/yyyy

Date Of Open (Cross Sell) dd/mm/yyyy

Sales Group Please select

Account Manager Please select

Primary Jobtitle Keywords

Secondary Jobtitle Keywords

Location

Finance

Operation Office

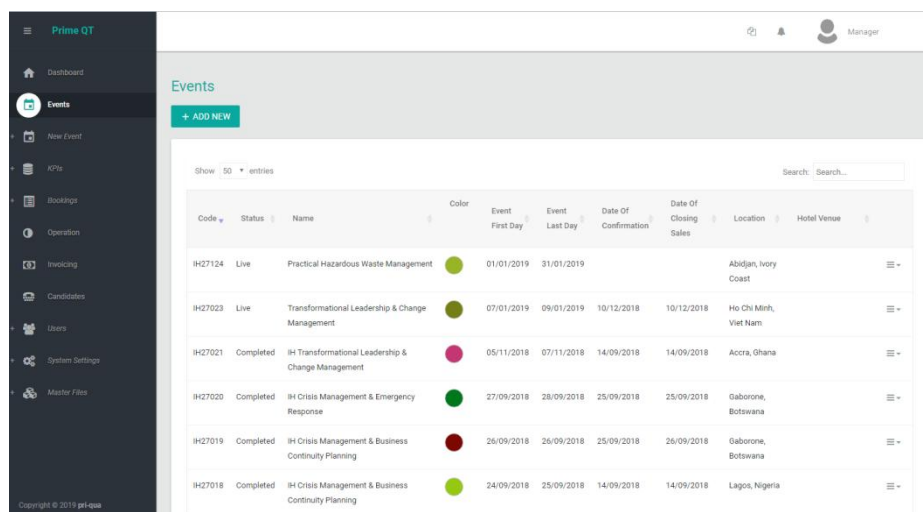
Operation Onsite

Production

Sales

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2. Show Event Tab to all sales users



Prime QT

Events

+ ADD NEW

Show 50 entries

Search: Search...

Code	Status	Name	Color	Event First Day	Event Last Day	Date Of Confirmation	Date Of Closing Sales	Location	Hotel Venue
IH27124	Live	Practical Hazardous Waste Management		01/01/2019	31/01/2019			Abidjan, Ivory Coast	
IH27023	Live	Transformational Leadership & Change Management		07/01/2019	09/01/2019	10/12/2018	10/12/2018	Ho Chi Minh, Viet Nam	
IH27021	Completed	IH Transformational Leadership & Change Management		05/11/2018	07/11/2018	14/09/2018	14/09/2018	Accra, Ghana	
IH27020	Completed	IH Crisis Management & Emergency Response		27/09/2018	28/09/2018	25/09/2018	25/09/2018	Gaborone, Botswana	
IH27019	Completed	IH Crisis Management & Business Continuity Planning		26/09/2018	26/09/2018	25/09/2018	25/09/2018	Gaborone, Botswana	
IH27018	Completed	IH Crisis Management & Business Continuity Planning		24/09/2018	25/09/2018	14/09/2018	14/09/2018	Lagos, Nigeria	

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- a Tất cả Sales User view được Events Tab như Manager, view được đầy đủ columns như Manager
- b Sales Users only view được 02 status là Live, Confirmed Events
- c Tại Event Details, Sales Users only view Event Summary như 1d bên trên,
- d Sales User không view được ADD NEW

3. Disable chức năng edit Business Unit và Budget Month, Remarks của User, only Manager có quyền edit từ Master file

RE: [From Derrick - PQ Singapore] x Start Call | Prime Quality Training x +

Not secure | pqm.co/Lead/StartCallForm/29

Prime QT

Dashboard

New Event

KPIs

SELECT COMPANY RESOURCE

START CALL

1

2

Call Info

Company Name*
Adama Science and Technology Uni

Direct Line*
255

Job Title*

Line Extension

00:47

Salutation
Please ...

First Name

Last Name

Mobile Phone 1
255

Mobile Phone 2
255

Mobile Phone 3
255

Work Email*

Work Email 1

Personal Email

Estimated Delegate Number

Training Budget Per Head

Good Training Month*
Not Set

First Follow Up Status
Neutral

Final Status
Neutral

Company Info

Budget Month*
Not Set

Business Unit

Remarks

REQUEST NEW EVENT

FINISH CALL

← Back to Companies List

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4. (Sales User) Show “KPIs/Enquire KPIs” Tab all sales users
- Sales User, trực thuộc Business Development Unit, only view “Enquire KPIs” thuộc Sales User đó tạo ra khi sell events
 - Sales User nếu thuộc Sales Management Unit (Manager/Users/Department Info), được quyền view tất cả KPIs của Direct Member trong Enquire KPIs. Nếu Sales User đó bị remove khỏi Sales Management Unit -> không còn quyền view Enquire KPIs của tất cả direct members
 - Sales User không được quyền highlight, copy trong Enquire KPIs (Tránh sao chép dữ liệu ra ngoài)
 - Sales User không được quyền Update hoặc Delete trong Enquire KPIs

Dashboard

Events

New Event

KPIs

Enquire KPIs

Consolidate KPIs

Bookings

Operation

Invoicing

Candidates

Users

System Settings

Enquire KPIs

Event

Search for Event

Date From*

20/12/2018

Date To*

19/01/2019

Salesman

Search for user

KPI Status

Please select

X CLEAR

Q SEARCH

Search:

Search...

	Direct Line	Job Title	Salutation	First Name	Last Name	Mobile Phone 1	Work Email	Personal Email	Mark KPI	KPI Remarks
n	202593030	Human Resource Manager	MRS	Bernice	Mbaka		bernice@rockberncoffee.com		false	Update Delete
n	645209111	Head Of Human Resources	MR	Germano	Ernesto Musili		germano.musili@riotinto.com		false	Update Delete

5. (Sales User) khi sales user Resigned hoặc Terminate khỏi hệ thống, tất cả entries trong NCL (Blocked, LOI, Live) đều bị chuyển qua Expired, để existing Sales User tiếp tục sell. Auto merge tất cả personal No Call List vào Company Resources

6. (Manager, Sales User) Rework “KPIs/Consolidated KPIs” Tab

- Thay cột Email = (USD) Written Revenue
- Thông số (USD) Written Revenue được lấy từ Booking/Approve Booking/Total Written Revenue, tính theo Date of Booking
- Value of Written Revenue tính theo USD

Prime QT

Dashboard

Events

New Event

KPIs

Enquire KPIs

Consolidate KPIs

Bookings

Operation

Invoicing

Candidates

Users

System Settings

Master Files

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Consolidate KPIs

Event

Search for event

Date From*

01/10/2018

Date To*

19/01/2019

Salesman

Search for user

X CLEAR

Q SEARCH

PRINT

Show

50

entries

Search:

Search...

Salesman	Email	New Event Request	KPI	No KPI	Call No Check
Yann Nguyen	yann.y@pqvn.co	0	0	0	7
Tracy Tran	tracy.l@pqvn.co	0	0	0	60
Tony Vu	tony.v@pqvn.co	0	0	0	67
Tin Dao	tin.t@pqvn.co	1	0	0	159
Sunny Nguyen	sunny.h@pqvn.co	0	0	0	12
Steve Dao	steve.l@pri-qua.com	1	0	0	44
Sophia Tran	sophia.t@pri-qua.com	1	0	0	53
Simon Vo	simon.h@pqvn.co	4	0	0	177
Serena Nguyen	serena.q@pqvn.co	0	0	0	1

7. (Manager, QC, HR) Rework “User” Tab

Users

+ ADD NEW

Please select

Show 25 entries

Search: Search...

ID	Name	Email	Business Phone	Mobile Phone	Extension	Department	Log viewer	
2	Manager	MANAGER@LOCALHOST	+84 0168 7040			Manager	Log viewer	
3	Quality Control	ncl@pri-qua.com				QC	Log viewer	
4	Tommy Nguyen	tommy.p@pri-qua.com		0949056031	116	Sales	Log viewer	
5	Tin Dao	tin.t@pqvn.co		0979075892	138	Sales	Log viewer	
6	Steve Dao	steve.l@pri-qua.com		0915219628	102	Sales	Log viewer	
7	Marcus Vo	marcus.p@pqvn.co		0962529443	830	Sales	Log viewer	
8	Simon Vo	simon.h@pqvn.co		0977005137	832	Sales	Log viewer	
9	John Vo	john.t@pqvn.co		0946982999	824	Sales	Log viewer	
10	Lisa Nguyen	lisa.h@pqvn.co	01669615341	0936052824	831	Sales	Log viewer	
11	Elly Le	elly.h@pqvn.co		01628656916	828	Sales	Log viewer	

a Show User List tương tự No Call List, có thanh Scroll bar ở giữa tính từ column Email

Showing 1 to 5 of 254 entries

b Đổi màu User theo User status

- Resigned User được đánh màu xanh lá cây
- Terminated User màu xanh da trời
- Live User màu đen

c Manager, view được các column bao gồm columns hiện tại

- ID
- Name
- User Status (Live, Resigned, Terminated) sync từ User Status
- Date of Birth
- Company Email
- Personal Email
- Business Phone
- Mobile Phone
- Extension
- Department
- Line Supervisor (Sync từ Direct Supervisor)

d HR, QC, view được các column, bao gồm columns hiện tại, không có quyền Edit

- ID
- Name
- User Status (Live, Resigned, Terminated) sync từ User Status
- Date of Birth
- Company Email
- Business Phone
- Mobile Phone
- Extension
- Department
- Line Supervisor (Sync từ Direct Supervisor)

8. (Manager) Include Interview Summary vào User Profile sau khi Manager approve employment
 - a Contract Info
 - Show được nhiều contract, 04 evaluation theo từng contract period, date of each evaluation, kết quả từng evaluation
 - Thông tin Contract này, sẽ hiện trong My Profile của từng user
 - b Add field Resume vào User/Basic Info, field này sync từ Candidate profile
9. (Manager, Sales) Show detailed of past booking trong Tier 1 Company (Event Name, Event Code, Event Date, Delegate Name, Delegate Email, Delegate Contact, Attendance Status)
10. Trong Manager/Company Resources, tạo 01 chức năng search emails theo filter (Job title, Location) and export emails from clients, chức năng này giúp Manager có 1 list email theo yêu cầu cụ thể nhanh nhất
11. (Sales) Show “Approved Booking” tab cho sales User
 - a Sales User only view được Approved Booking thuộc về họ
12. New Event Request
 - a Manager/New Event/Assigned New Event, tạo delete button cho any entry
 - b Show New Event Request First Follow Up status color giống như No Call List, dành cho tất cả entries trong New Events và Assigned New Events. 4 status và color
 - Neutral
 - Rejected
 - Interest
 - Pending

The screenshot shows a user profile for Thomas Getachew, HR Manager at Zemen Bank. The profile includes a WhatsApp icon, a timestamp (20-Dec-2018 15:55:07), and a phone number (911657748). Below the profile information, there is a section titled "First Follow Up Status" with a legend showing five status options: Neutral (grey circle), Rejected (green circle), Interest (orange circle), Pending (red circle), and Booked (blue circle). The "Booked" status is currently selected.

- c Sau khi Submit Request Brochure trong New Event Request, entry sẽ bị đổi qua Blue color giống status Booked như trên
- d Chỉnh lại khung nội dung New Event Remarks nằm trong Sales Users/New Event

The screenshot shows a form for "New Event Request". It has several fields: "New Dates" (with a dropdown arrow), "New Training Type" (with a dropdown arrow and "None" selected), "Attach proof for request brochure" (with a text input field), "Assign User" (with a dropdown arrow and "Derrick Nguyen" selected), and "New Event Remarks" (with a text input field containing the text: "05/10/18- Tommy scanned at 10:16PM-Endris now is transferred to new position, he already passed the case to new HR, will send HR contact on Saturday 06/10/18").

Chuyển qua dạng box chức đủ 6 text row, có thanh scroll lên xuống

HR

13. (Manager, HR) Rework “Candidates” and “Candidates Interview on Today” Tab

a Tạo Scroll bar ở giữa tính từ column Mobile Number

30/11/2018 20:07:50	Simon Vo	ZW (263)	Meikles Limited Tanganda Tea...	Internal Audit Risk Manager	hkufakunesu@tangandatea.c	Live NCL Expired	Detail
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Showing 1 to 5 of 254 entries

Previous 1 2 3 4 5 ... 51 Next

Prime QT
Dashboard
Candidates
Employees
Master Files

Candidate List
+ CREATE CANDIDATE

Show 50 entries
Search: Search...

First Name	Last Name	Mobile Number	Personal Email	Application Source	Office Location	PS Status	PS Reason	1F2F Status	1 R
Khanh	Nguyen Quoc	0586109439	khanh.nguyen_29999@hcmut.edu.vn	topcv	Ho Chi Minh	Rejected	Not looking for jobs now	Initial	
My	Pham Thi Thao	0935936595	thaomy250597@gmail.com	topcv	Ho Chi Minh	Rejected	Feeling not suitable	Initial	
Phuc	Le Nguyen	0772990054	nphuc.le16@gmail.com	topcv	Ho Chi Minh	Rejected	Got a job	Initial	
Nhi	Tran Ngoc Thu	0994141656	thunhi298@gmail.com	topcv	Ho Chi Minh	Rejected	Prefer Customer Service field	Initial	
Hieu	Le Thi Minh Hieu	0364559212	minhhieu.h2t@gmail.com	topcv	Ho Chi Minh	Rejected	Got a job	Initial	
Anh	Tran Nguyen Van	0833028308	trnva.vananh@gmail.com	topcv	Ho Chi Minh	Rejected	Got a job	Initial	
Trang	Nguyen Thi Thuy	0393884560	Trang.nguyenthithuyvn@gmail.com	topcv	Ho Chi Minh	Rejected	Prefer Marketing field	Initial	
Nguyen	Nguyen Thi Thao	0934319359	nguyennguyen653@gmail.com	topcv	Ho Chi Minh	Rejected	Prefer Logistics field	Initial	
Thuan	Pham The Hoa	0909819573	Phamthuan2611@gmail.com	topcv	Ho Chi Minh	Rejected	Not looking for job now	Initial	
Anh	Vo Ha Tuyet	0939734723	vohatuyetanh@gmail.com	topcv	Ho Chi Minh	Rejected	Not yet graduated	Initial	
Tue	Do Gia	0938833196	giatue96@gmail.com	topcv	Ho Chi Minh	Rejected	Not yet graduated	Initial	

14. (HR) ấn “Master files” Tab ở HR User

15. (Manager, HR) hiện KPIs tab dành riêng cho HR

a Recruitment Call KPIs – Là số PS Round interview input daily vào hệ thống, tính được total Interview KPIs theo từng period

b Employee KPIs – Là số lượng employee được request employment, và được approve theo từng period

Finance

16. (Manager, Finance) Create Invoice, chọn được Invoice Number, Date of Issue

Admin

17. (Manager) Template
 - a Khi add New Template, có thể chọn được nhiều Department sharing 1 template giống nhau
18. (Manager) Non downloadable Template
 - a Tạo 1 directory dạng E-Library để upload Template mà user không có quyền download, copy, chỉ có quyền view
 - b Có thể upload video lên directory này để User coi, không có quyền download, chia sẻ, copy