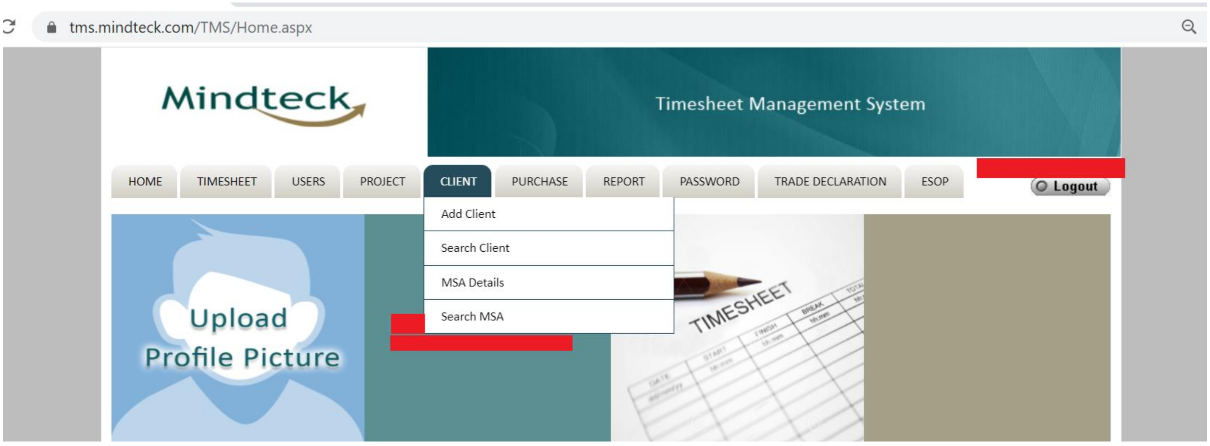
Client Module

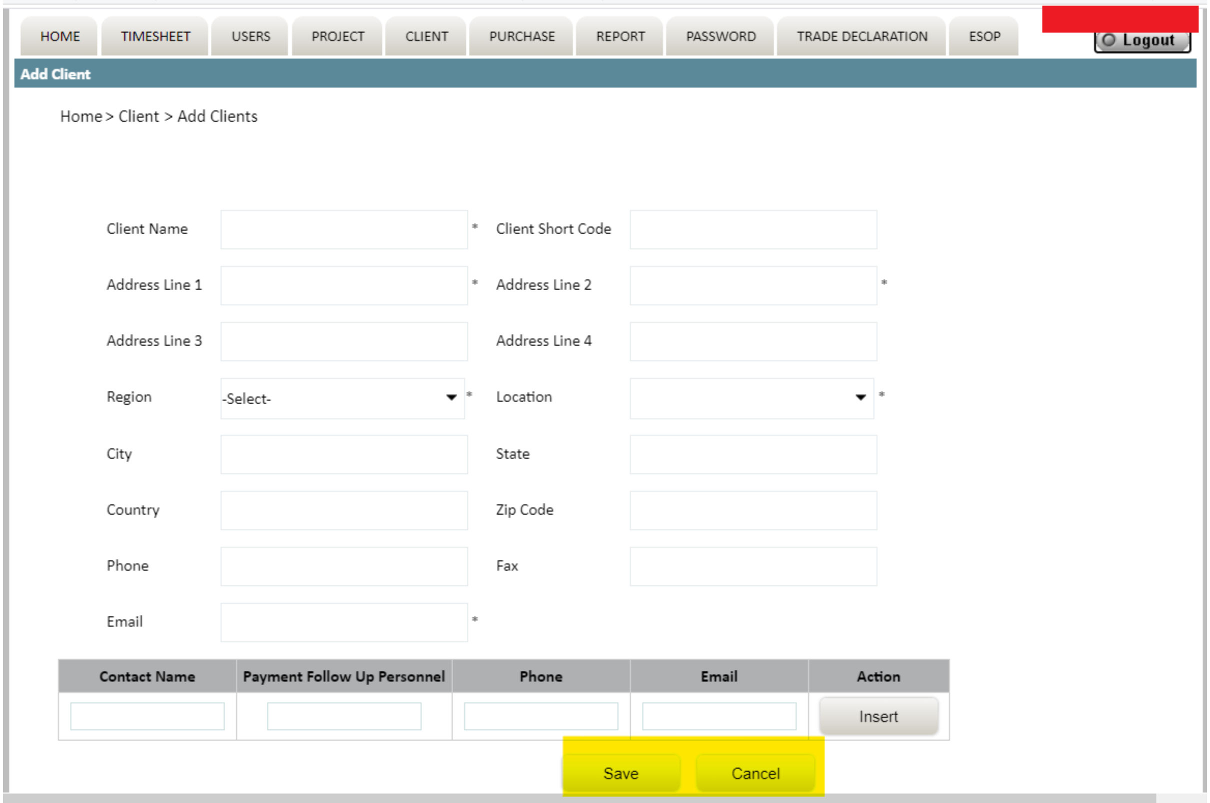
Overview

TMS Client Module deals with Client related information of all Mindteck Clients. This module is being used by Sales, Finance and Legal teams of Mindteck. TMS has following features under Client module.

1. Add Client
2. Search Client
3. MSA Details
4. Search MSA



Add Client



TMS users having following Role(s) can access this feature.

- AR Personal (Accounts Manager)
- Finance Controler
- BDM
- Ocn Creator
- Regional Sales Head
- ART Head

Prerequisites to create a new client are as follows.

- All Mandatory fields should be selected/filled.
- At least one Client contact Details should be entered.

To create a new client, the user must select "**Add Client**" option under **CLIENT** menu.

Once a new client is created, the newly created client should be sent for Approval by clicking "**Send for Approval**" button

- Creator of the Client and ART Head (Finance personnel) will get email notification from TMS.

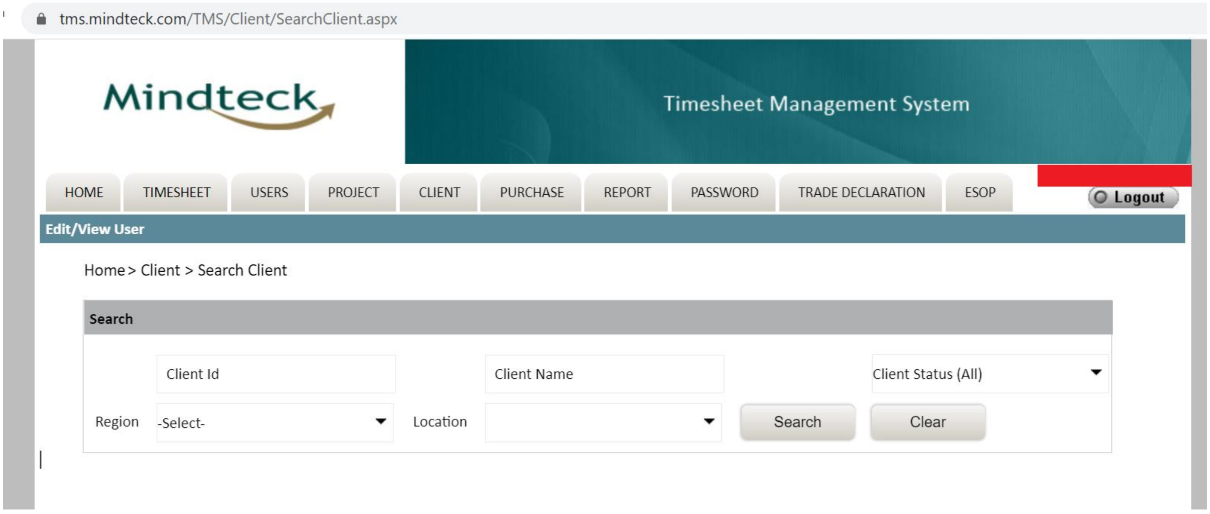
ART Head can either Approve or Reject the newly created client by providing proper comments.

- To do this, ART Head must select "**Search Client**" option under **CLIENT** menu and get client details by using the available filter options.

- ART Head and Creator of the Client will be notified about the action taken by Finance Personnel (Approved/Rejected) via an email

Only after approval of ART Head, a Client is considered as valid Client and the same will be available for creating OCN.

Search Client



TMS users having following Role(s) can access this feature.

- AR Personal (Accounts Manager)
- Finance Controler
- BDM
- Ocn Creator
- Regional Sales Head
- ART Head

User can select “**Search Client**” under **CLIENT** menu to View Clients.

User can filter the clients by Client Name, Region, Location, and status of the client. Once the required client is available, “**Edit/View**” option can be used to see the respective client details.

Client Creation and Approval Workflow

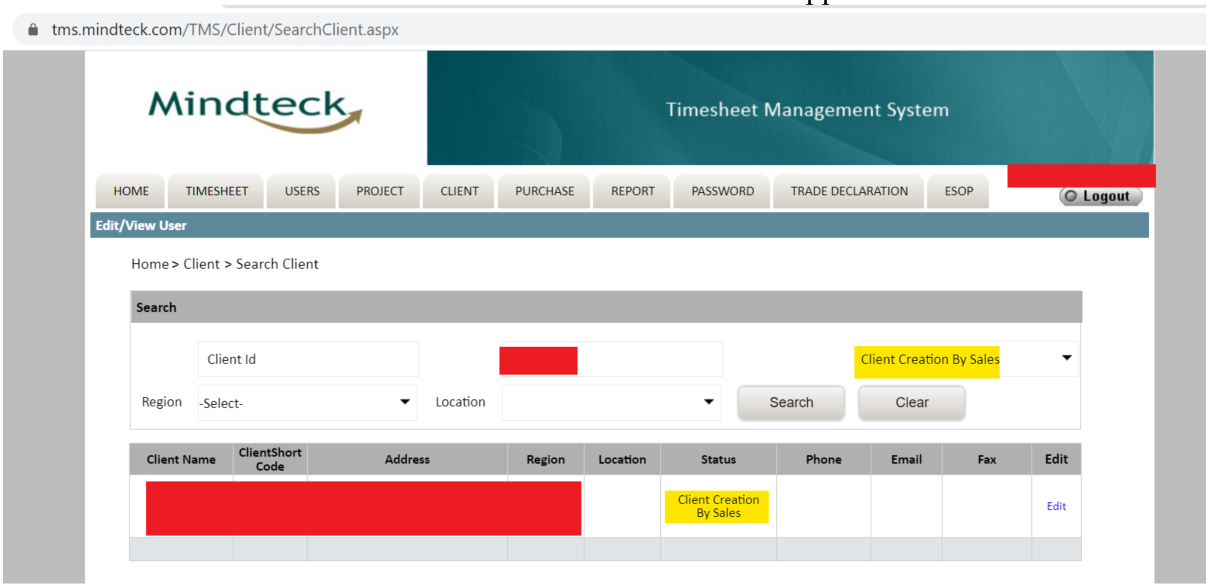
Following are the two major steps to create a new Client into the system.

1. Client Creation by Sales Personnel
2. Client Approval by Finance Personnel

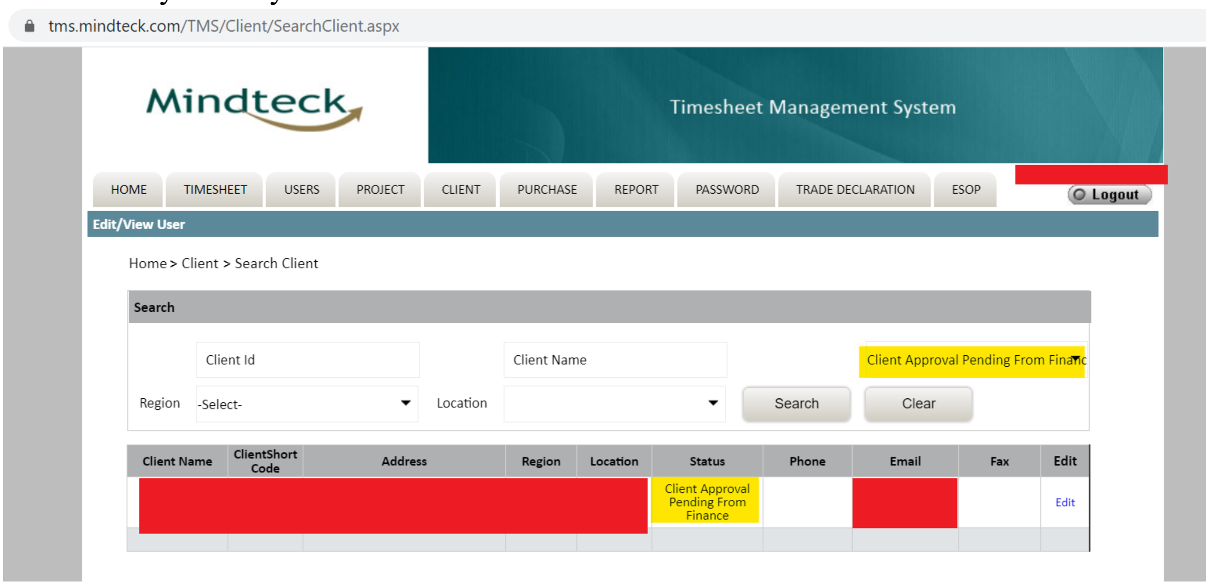
Sales personnel like BDM/RSH has access to create a new client into TMS. Once created, they must get the details approved by a Finance personnel (ART Head).

Following are the actual status messages present in TMS for tracking the Client.

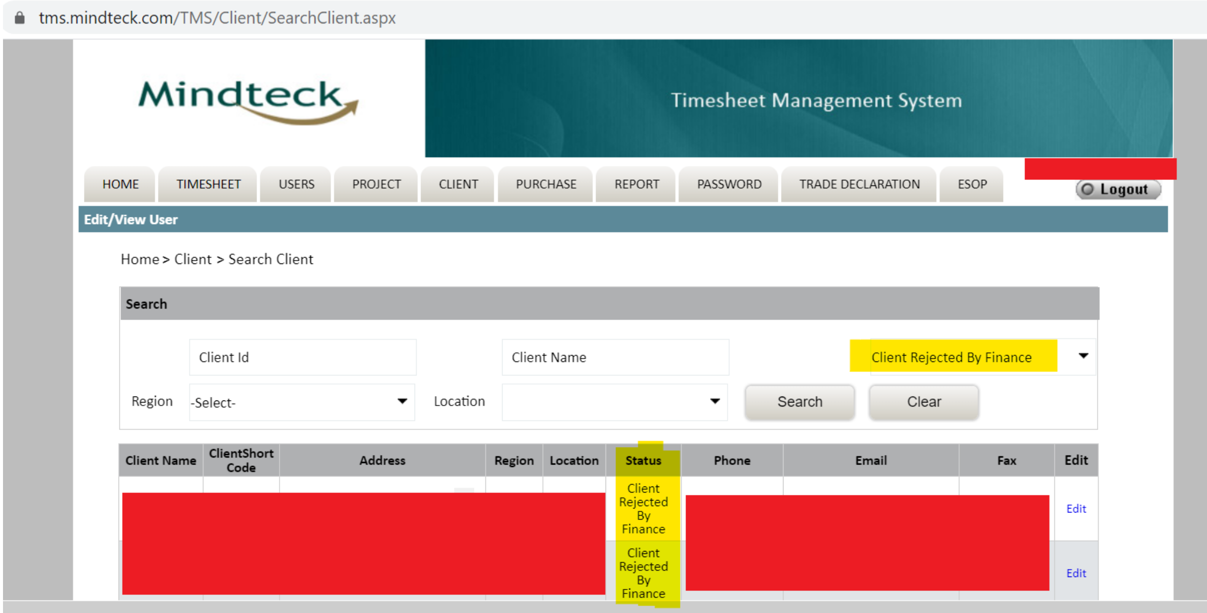
- Client Creation by Sales
  - BDM/RSH has created the client but not sent it for Finance's approval.



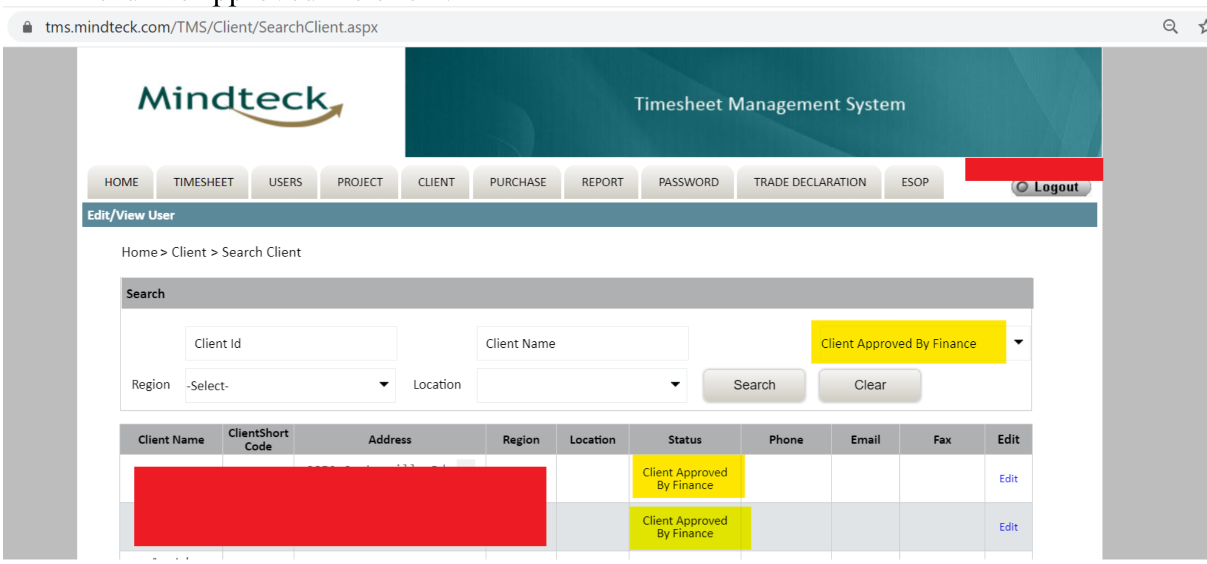
- Client Approval Pending from Finance
  - BDM/RSH has sent the newly created client for approval, but ART Head has not taken any action yet.



- Client Rejected by Finance
  - ART Head has rejected the newly created client with proper reason(s)

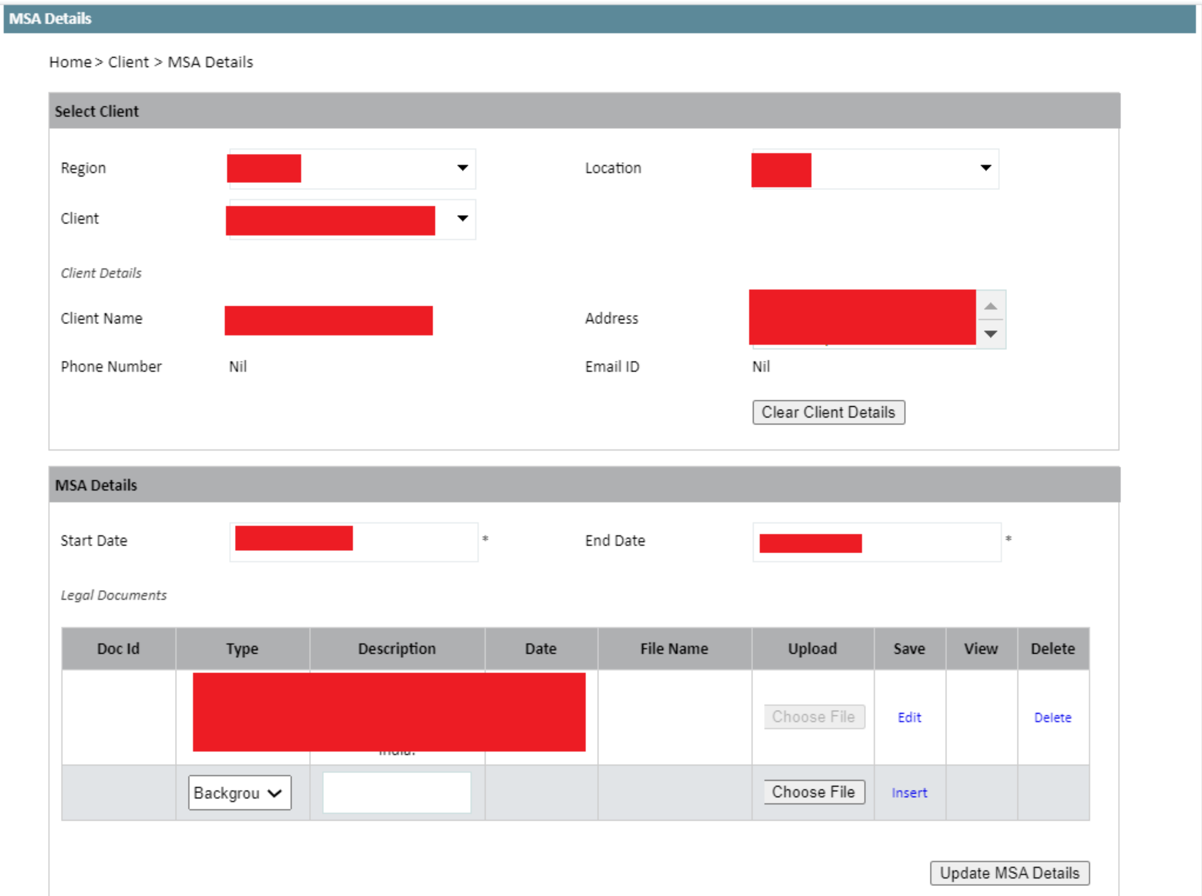


- Client Approved by finance
  - ART Head has approved the client.



Once the client is approved by ART Head, then the respective client will be available for creating SGM and OCN into the system.

MSA Details



TMS users having following Role(s) can access this feature.

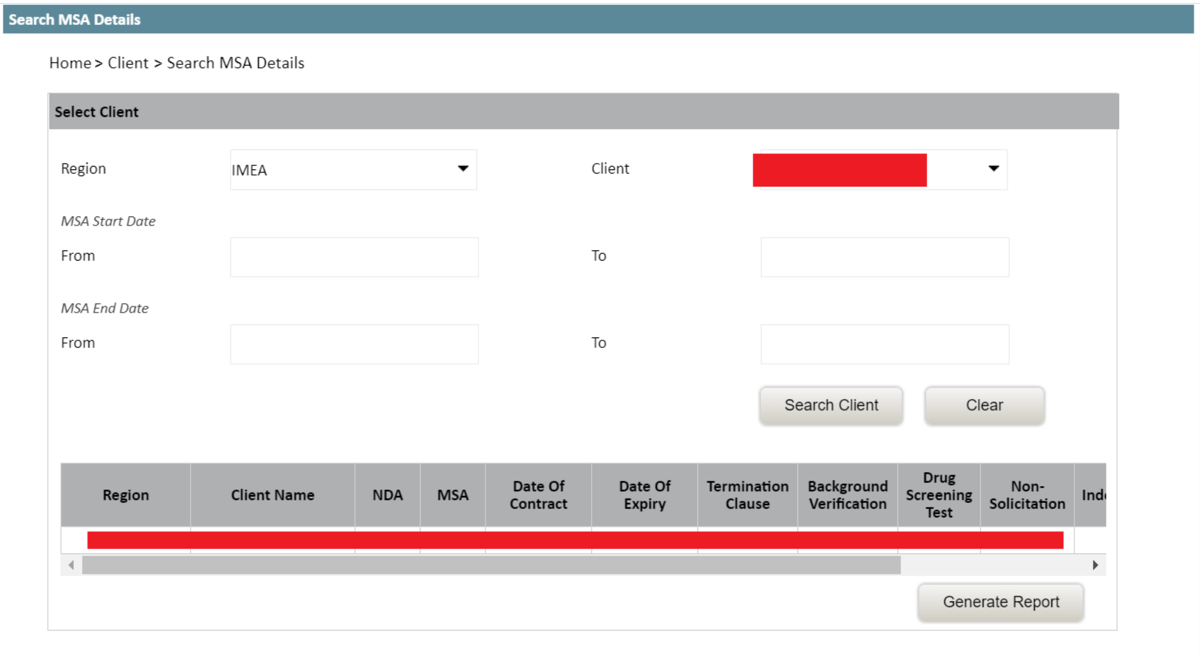
- VP Legal
- MSA Read

User can select “**MSA Details**” option under **CLIENT** menu to access this feature.

To Update/View MSA details of a particular Client, the client must be filtered using the options Region, Location and Client.

Once the required client is listed, MSA Details can be updated.

Search MSA



TMS users having following Role(s) can access this feature.

- VP Legal
- MSA Read

User can select "**Search MSA**" option under **CLIENT** menu to access this feature.

Required Client can be filtered from the option given in the page and the resulted Client MSA details will be displayed in the grid.

User can also make use of "**Generate Report**" option. This action will generate the list of current clients in the grid into an Excel file.

Technical Details

Code Details

Related ASPX pages

- Mindteck.TMS\Client\AddClient.aspx
- Mindteck.TMS\Client\ModifyClient.aspx
- Mindteck.TMS\Client\MsaDetails.aspx
- Mindteck.TMS\Client\SearchClient.aspx
- Mindteck.TMS\Client\SearchClientMsaDetails.aspx

Database Details

Related DB Tables

- tsms_client
- tsms_clientcontact
- tsms_clientstatusmaster