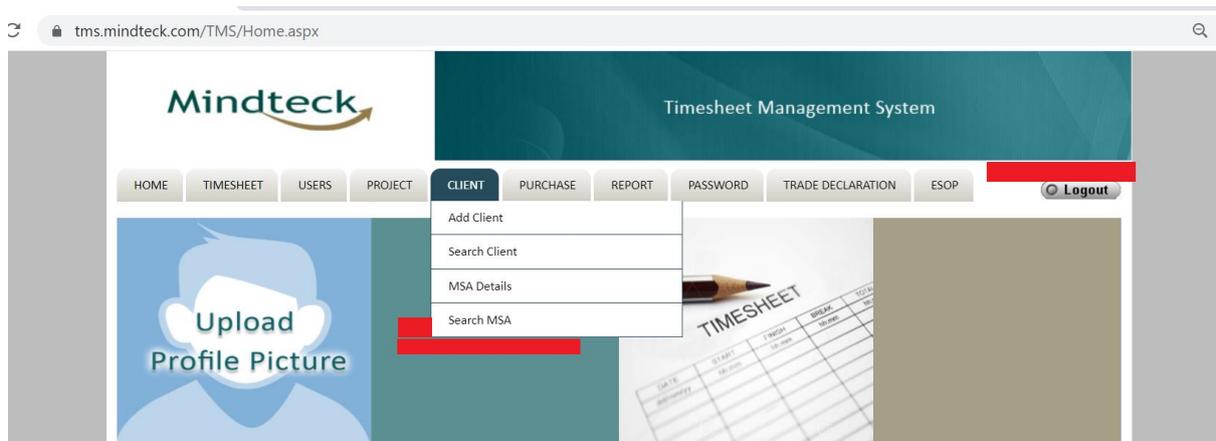


Client Module

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

HOME TIMESHEET USERS PROJECT CLIENT PURCHASE REPORT PASSWORD TRADE DECLARATION ESOP Logout

Add Client

Home > Client > Add Clients

Client Name * Client Short Code

Address Line 1 * Address Line 2 *

Address Line 3 Address Line 4

Region * Location *

City State

Country Zip Code

Phone Fax

Email *

Contact Name	Payment Follow Up Personnel	Phone	Email	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert

Save Cancel

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

- AR Personal (Accounts Manager)
- Finance Controller
- 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

The screenshot shows the Mindteck Timesheet Management System interface. The URL in the browser is `tms.mindteck.com/TMS/Client/SearchClient.aspx`. The Mindteck logo is on the left, and the system name is on the right. A navigation menu includes: HOME, TIMESHEET, USERS, PROJECT, CLIENT, PURCHASE, REPORT, PASSWORD, TRADE DECLARATION, ESOP, and a Logout button. Below the menu is an "Edit/View User" button. The breadcrumb trail reads "Home > Client > Search Client". The search form contains the following fields: Client Id (text input), Client Name (text input), Client Status (All) (dropdown menu), Region (-select-) (dropdown menu), and Location (text input). There are "Search" and "Clear" buttons.

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

- AR Personal (Accounts Manager)
- Finance Controller
- 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.

The screenshot shows the TMS interface for searching clients. The breadcrumb trail is 'Home > Client > Search Client'. The search filters include 'Client Id' (redacted), 'Region' (-Select-), and 'Location' (-Select-). The 'Status' dropdown is set to 'Client Creation By Sales'. Below the search filters is a table with the following columns: Client Name, ClientShort Code, Address, Region, Location, Status, Phone, Email, Fax, and Edit. The first row of the table is redacted, and the 'Status' column for that row is highlighted in yellow with the text 'Client Creation By Sales'. There is an 'Edit' link in the 'Edit' column for that row.

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

The screenshot shows the TMS interface for searching clients. The breadcrumb trail is 'Home > Client > Search Client'. The search filters include 'Client Id' (redacted) and 'Client Name' (redacted). The 'Status' dropdown is set to 'Client Approval Pending From Finance'. Below the search filters is a table with the following columns: Client Name, ClientShort Code, Address, Region, Location, Status, Phone, Email, Fax, and Edit. The first row of the table is redacted, and the 'Status' column for that row is highlighted in yellow with the text 'Client Approval Pending From Finance'. There is an 'Edit' link in the 'Edit' column for that row.

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

tms.mindteck.com/TMS/Client/SearchClient.aspx

The screenshot shows the Mindteck Timesheet Management System interface. The top navigation bar includes links for HOME, TIMESHEET, USERS, PROJECT, CLIENT, PURCHASE, REPORT, PASSWORD, TRADE DECLARATION, ESOP, and a Logout button. Below the navigation bar, the breadcrumb path is 'Home > Client > Search Client'. The search form contains fields for Client Id, Client Name, Region (a dropdown menu), and Location (a dropdown menu). A dropdown menu for 'Client Rejected By Finance' is selected. The search results table has columns for Client Name, ClientShort Code, Address, Region, Location, Status, Phone, Email, Fax, and Edit. Two rows are visible, both with a red background and a status of 'Client Rejected By Finance'.

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

tms.mindteck.com/TMS/Client/SearchClient.aspx

The screenshot shows the Mindteck Timesheet Management System interface. The top navigation bar includes links for HOME, TIMESHEET, USERS, PROJECT, CLIENT, PURCHASE, REPORT, PASSWORD, TRADE DECLARATION, ESOP, and a Logout button. Below the navigation bar, the breadcrumb path is 'Home > Client > Search Client'. The search form contains fields for Client Id, Client Name, Region (a dropdown menu), and Location (a dropdown menu). A dropdown menu for 'Client Approved By Finance' is selected. The search results table has columns for Client Name, ClientShort Code, Address, Region, Location, Status, Phone, Email, Fax, and Edit. Two rows are visible, both with a red background and a status of 'Client Approved By Finance'.

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

MSA Details

Home > Client > MSA Details

Select Client

Region [Redacted] Location [Redacted]
Client [Redacted]

Client Details

Client Name [Redacted] Address [Redacted]
Phone Number Nil Email ID Nil

MSA Details

Start Date [Redacted] * End Date [Redacted] *

Legal Documents

Doc Id	Type	Description	Date	File Name	Upload	Save	View	Delete
	[Redacted]	[Redacted]	[Redacted]		<input type="button" value="Choose File"/>	Edit		Delete
	Backgrou	[Redacted]			<input type="button" value="Choose File"/>	Insert		

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

Search MSA Details

Home > Client > Search MSA Details

Select Client

Region: Client:

MSA Start Date
From: To:

MSA End Date
From: To:

Region	Client Name	NDA	MSA	Date Of Contract	Date Of Expiry	Termination Clause	Background Verification	Drug Screening Test	Non-Solicitation	Ind

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