ANANT INFOMEDIA PVT. LTD.
PANJIM, GOA

INTERNSHIP REPORT

RIDDHI DEGVEKAR
1905

Report of Internship at

Anant Infomedia Pvt. Ltd.

Submitted by

Riddhi N. Degvekar

MCA Semester VI

1905

Under the guidance of

Mrs. Soniya Nagvenkar

(Senior Project Manager, Anant Infomedia Pvt. Ltd.)

GOA UNIVERSITY

GOA BUSINESS SCHOOL

CERTIFICATE OF EVALUATION

This is to certify that Ms. Riddhi N. Degvekar has successfully completed her internship at Anant Infomedia Pvt. Ltd., Panjim, Goa, in partial fulfillment for the award of the degree in Master of Computer Application.

Examiner 1

Examiner 2

Place: Goa University

Date:

Dean, Goa Business School

Certificate Of Internship

ANANT

ANANT INFOMEDIA PVT. LTD.

CERTIFICATE OF INTERNSHIP

We present this certificate to

Riddhi Nhanu Degvekar

In appreciation for your work done as an intern from

10th January 2022 to 10th June 2022

Thaisen

Thaisen Khan
Manager Admin & Accounts

Kiran Kulkarni
Director Operations

Acknowledgement

The internship opportunity I had with Anant Infomedia Pvt Ltd was a great chance for learning and professional development. Therefore, I consider myself grateful for providing me with an opportunity to be a part of it.

My sincerest gratitude to Mr. Kiran Kulkarni, Director Operations, AIPL, and Mrs. Soniya Nagvenkar, Project Lead, AIPL for giving me the opportunity to work on these projects and for all the guidance and support provided to me during the internship.

I would like to express my special gratitude and thanks to Mr. Kundal Chari (Team Lead), Dhanshree Dhavaskar (Team Lead), Mr. Bhavesh Gurudas (Software Support Executive) and Ulita Barreto (Project Lead) for giving me all the necessary guidance and support throughout internship projects.

I would like to thank Ms. Siddhi Ghadigaonkar (HR) for always helping me out whenever I was in need.

I thank Mr. M. S. Dayanand (Dean, Goa Business School, Goa University), Mr. Ramdas Karmali (Prof. and TPO, MCA, GBS, Goa University), Mr. Jarret Stevan Anthony Fernandes (Assistant Prof, MCA, GBS, Goa University) and all the faculty of MCA, Goa University for their constant encouragement and support during the project work.

Finally, I would also like to thank my family and friends who were always ready to help me and guide me in all aspects of life.

Contents

Introduction

This report is a short description of my full-time internship at Anant Infomedia Pvt. Ltd., Panjim Goa.

I joined as an Intern at Anant Infomedia Pvt Ltd on the 10th of January 2022 and have been here since then. This report contains necessary information about the organization, the assignments and tasks I worked on, and the other training I completed in this internship period.

In the chapters that will follow, a description about the company, the work, the culture, etc. Then, a brief information about the assignments, the modules I built, and the tasks I completed.

This report highlights my learning experience and my contributions to the organization as an intern. This will describe the knowledge that I gained by completing the tasks that were assigned to me.

I'll also be describing the tools and technologies that were used followed by my internship timeline. I shall conclude by sharing my experience and how it has helped me to grow, both on the personal and professional front.

Company Profile

Name of Company	**Anant Infomedia Pvt Ltd**
Founder of Company	**Mr. Sandeep Verenkar**
Address of Company	**Minum Residency, F-3, 4th, 18th June Rd, Above HDFC Bank, Panaji, Goa 403001**
Phone Number	**0832-6638126 / 153**
Email id	**info@anant.co.in**
Website	**http://www.repforce.in/**

Anant infomedia private limited is a product-based company. The company was established in August 2001. It is a premier IT company based in Panji, Goa. The company has a rich experience, which it has drawn from being in the IT business for over a decade. In the last 7 years Anant Infomedia Pvt. Ltd specializes in pharma-Customer Relationship Management/Sales Force Automation Software, providing end to end solutions such as Software as a service on Web, Mobile and Tablet. AIPL has a team of more than 80+ employees including an office in Mumbai.

AIPL was awarded “BEST IT SOLUTION PARTNER” IN 2011" by Abbott Nutrition.

AIPL specializes in a cloud CRM solution for the Life Sciences Industry called Repforce.

Repforce as a Product

RepForce is a Cloud CRM solution for the Life Sciences industry. RepForce offers simple solutions with impeccable service. Repforce solutions have enabled Life Sciences companies to build extraordinary relationships with not only their customers but also their employees and other stakeholders. Today, RepForce enabled over 35000 users across 6 countries to stay ahead of competition with our state-of-the-art CRM software, RepForce.

It is designed keeping in mind the specific needs of the Life Sciences industry. RepForce is India's pioneer and the leading Sales Force Automation (SFA) solution in SaaS model. We provide end-to-end, mobile-friendly, cloud-based sales force automation to empower our customers to work more efficiently, optimize their sales efforts and increase their bottom lines.

Key features of Repforce are as follows: -

- Master Profile: Manage master ails like doctors, chemists, stockiest, hospitals all in one place.
- Tour Planning: Help your sales team to plan their monthly and yearly tours including workflow and approvals.
- Reports & Dashboards: Monitor your team's daily field work activity through Standard, Monitoring & Admin Reports. Create customized reports. Export reports in PDF or CSV format. Regularly review action points.
- Review Action Module: Enter review points for your team, track progress & compare with previous reviews. Accessible through tablet, mobile app & web.
- E-detailing: Make detailed product information available offline through iPad/Tablet for your customers and report DCR offline.
- Expense & Leave Management: Calculate automatic daily expense based on DCR reporting, Monthly Expense Statement, Workflows & Approvals. Apply, approve and manage leaves based on workflows.
- Inventory Management: Keep track of inflow and outflow of samples and promo goods. Dispatch, assign, reconcile & acknowledge inventory, all from one place.
- Survey Wizard: Conduct surveys to collect feedback on training programs and gauge team satisfaction. Gather feedback from your stakeholders-Doctors, Chemists etc.
- E-learning: Create courses and other training programs, assign employees, manage exams and get feedback.

Repforce CRM MODULES are: -

- Accounts Management- Hospitals, Institutions, Clinics, CnF, Stockist, Chemists
- Contact Management- Doctor Profiling, Chemist Profiling and Interlinking
- Territory Management- Div, Zones, HQ, Territories, Areas, Patches
- Sales Force Reporting – Tour Plans, DCR's, Expenses, Leaves, Sales Data
- Sales Force Communications- I mails, Circulars, SMS's
- Sales Force Learnings - Faqs, Medical Dictionary, E-learning
- Salesforce Dashboards – Standard Reports, Report Generators, Analytics
- Product Management – Samples, Promos, Scientific Literatures
- Targets Management – User wise, Product Group Wise, Territory wise
- User Management – Access Rights, Vacancies, Organograms, Hierarchy

Work At Anant Infomedia Pvt. Ltd.

1. Standard Tour Plan (Module Tour Plans)

To create responsive Standard Tour plan Listing Page to display all the yearly records of the user and to allow users to search for the Standard Tour Plans which have been already created into the application. My contributions were:

- ➔ To display all the STP records of the user in the listing table.
- ➔ To display search filters and to allow users to search for the Standard Tour Plans which have been already created into the application.
- ➔ To display responsive design detail view page on click of year and to display details and approval history tab in detail view page.
- ➔ To show the history of Standard Tour plan record on click of the show history link once the Standard Tour plan has been submitted.
- ➔ To add home and filter icons to the listing page.
- ➔ To show the history of Standard Tour plan record on click of show history link once the Standard Tour plan has been submitted.

1.1 Standard Tour Plan Listing (Search)

Purpose, Scope and Business functionality

This allows the users to search for the Standard Tour Plans which have already been created by the user into the system.

Standard Tour Plans (STANDARD TOUR PLAN) can be created only once a Year and the same STANDARD TOUR PLAN can be reused for creating the Monthly Tour Plans.

Technical functionality

Use Case Description: This will allow users to search Standard Tour Plan which have been already created by the user.

Primary Actor: MR, DM, RM, ZSM, NSM, Sales admin

Precondition: User has valid login credentials and has logged in to the system.

Trigger: User clicks on 'Tour Plans' in the Menu and clicks on 'Standard Tour Plan'.

Basic Flow:

1. User clicks on 'Tour Plans' in the Menu and clicks on 'Standard Tour Plan'.
2. He will be shown a page where he can search the Standard Tour Plan entered for previous years. Users will get to search Standard Tour Plan based on the below fields. To search for a STANDARD TOUR PLAN, users will enter the below details and click on 'Search'.

   a. Division: It will be a dropdown with options as per the division master. It will be a mandatory parameter for selection for search to be performed. It is applicable only for sales admin users.

   b. Role: It will be a dropdown with options as per the designation master. It will be a mandatory parameter for selection for search to be performed. It is applicable for all users except medical rep.

   c. User: It will be a dropdown with options as per the user master. users will be loaded as per the role selected. It will be a mandatory field for selection for search to be performed. It is applicable for all users except medical rep.

   d. Financial Year: It will be dropdown loading calendar year values. It will be a mandatory field for selection for search to be performed. It is applicable for all users.

   e. Status: It will be a dropdown with options i.e., saved, submitted, approved and rejected. It will be a mandatory field for selection for search to be performed. It is applicable for all users.

3. If the STANDARD TOUR PLAN is found, it will be shown in the STANDARD TOUR PLAN listing with following columns:

   a. Sr. No: Incremental number from 1 to number of STANDARD TOUR PLAN filed.

b. Year: Year for which the STANDARD TOUR PLAN is filed.

c. Requester: Name of the user who has requested the STANDARD TOUR PLAN.

d. Status: Status of the STANDARD TOUR PLAN request in the filing process. Fields will be Saved, Submitted, Approved or Rejected.

e. Pending With: The name of the user with whom the request is Pending With.

f. History: This will show a link, which will open a popup showing history details for the action performed by the user and approval pending with details of the STANDARD TOUR PLAN.

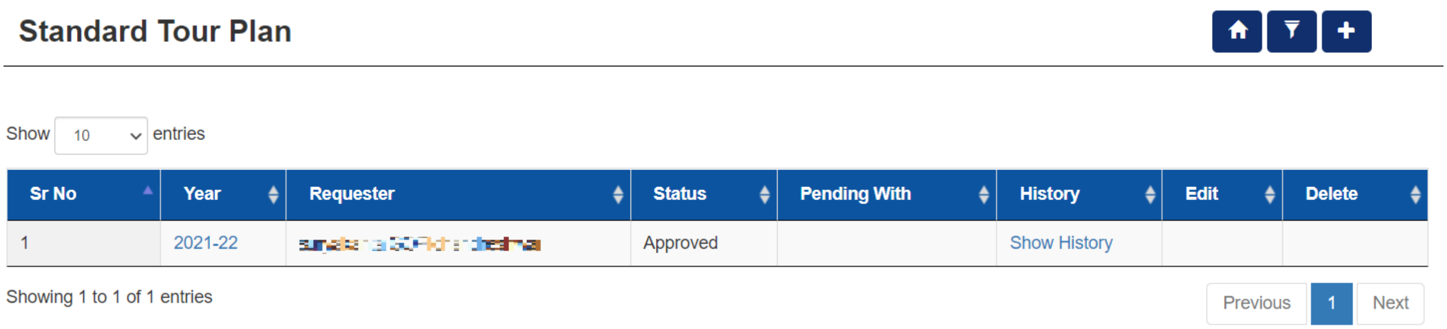
g. Edit/Delete: This will show Edit and Delete Options only if the STANDARD TOUR PLAN is in save mode. If the STANDARD TOUR PLAN is submitted for approval, Edit and Delete options will not be shown.

Validations: If users leave any field empty while searching then it displays a validation message.

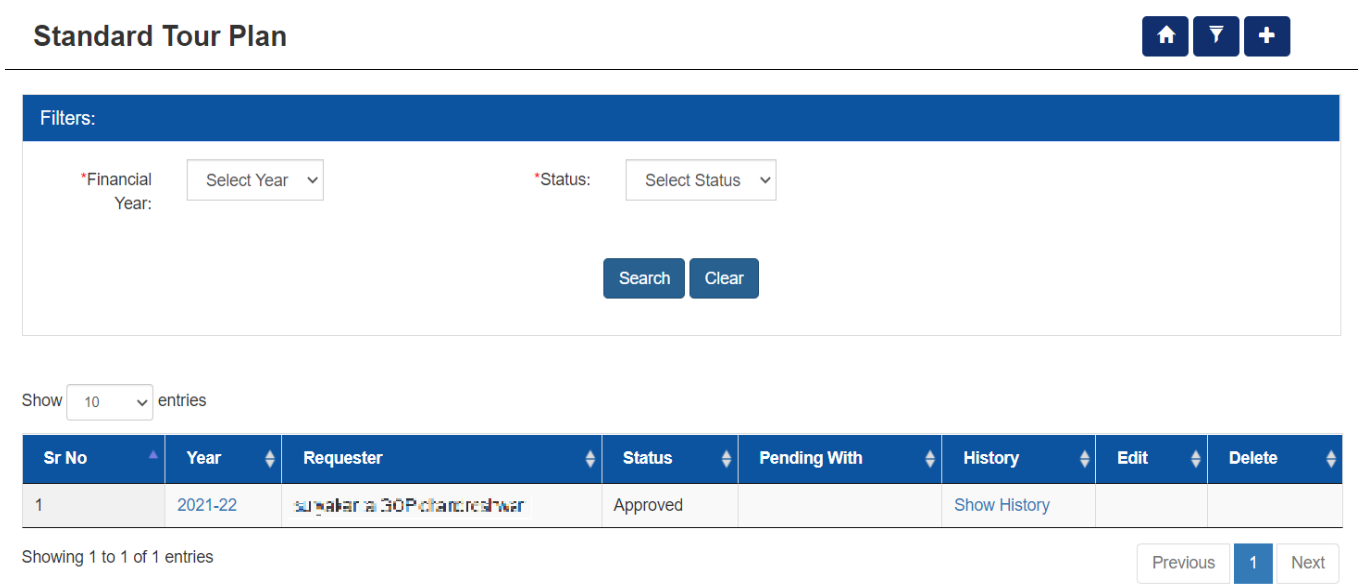
Post Condition: The User is able to search for the Standard Tour Plan with the search criteria specified by the user.

Screenshots

1. Listing



2. Search Filter



3. Show History

Standard TourPlan: suryakanta GOPIchandrashwar - (2021-22)

User	Status	Date	Reason
suryakanta GOPI chandrashwar	Submitted	06-04-2022	
YUVARAJ N	Pending	06-04-2022	
YUVARAJ N	Approved	06-04-2022	
suryakanta GOPI chandrashwar	Edit Request	06-04-2022	..
YUVARAJ N	Approved	06-04-2022	
suryakanta GOPI chandrashwar	Submitted	06-04-2022	okokok
YUVARAJ N	Pending	06-04-2022	
YUVARAJ N	Approved	06-04-2022	
suryakanta GOPI chandrashwar	Edit Request	23-04-2022	ok
YUVARAJ N	Approved	23-04-2022	
suryakanta GOPI chandrashwar	Submitted	23-04-2022	ok
YUVARAJ N	Pending	23-04-2022	
YUVARAJ N	Approved	02-06-2022	test

4. Detail View

Standard TourPlan View: (2021-22) suryakanta GOPIchandrashwar

Standard TourPlan Edit/Delete Request

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Approval History | Details

Day	Total Planned Customer Count
Mon1	5 Dr, 0 Ch,0 St

Activity:	FIELD WORK	Area/Patch:	AVADI 1	Planned Customers:	KUNJARAMOORTHY Prakash (DR)	Note:
Activity:	FIELD WORK	Area/Patch:	AVADI 1	Planned Customers:	[illegible] Prakash (DR)	Note:
Activity:	FIELD WORK	Area/Patch:	AVADI 1	Planned Customers:	[illegible]	Note:
Activity:	FIELD WORK	Area/Patch:	AVADI 1	Planned Customers:	[illegible]	Note:
Activity:	FIELD WORK	Area/Patch:	AVADI 1	Planned Customers:	KALYANA SUNDARAM Prakash (DR)	Note:

Day	Total Planned Customer Count
Tue1	3 Dr, 0 Ch,0 St
Wed1	3 Dr, 0 Ch,0 St
Thu1	3 Dr, 0 Ch,0 St
Fri1	3 Dr, 0 Ch,0 St
Sat1	3 Dr, 1 Ch,0 St

Standard TourPlan View: (2021-22) suryakanta GOPIchandreshwar

Standard TourPlan Edit/Delete Request

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Approval History | Details

User:	suryakanta GOPIchandreshwar	**Status:**	Submitted	**Date:**	2022-04-06	**Reason:**	
User:	YUVARAJ N	**Status:**	Pending	**Date:**	2022-04-06	**Reason:**	
User:	YUVARAJ N	**Status:**	Approved	**Date:**	2022-04-06	**Reason:**	
User:	suryakanta GOPIchandreshwar	**Status:**	Edit Request	**Date:**	2022-04-06	**Reason:**	..
User:	YUVARAJ N	**Status:**	Approved	**Date:**	2022-04-06	**Reason:**	
User:	suryakanta GOPIchandreshwar	**Status:**	Submitted	**Date:**	2022-04-06	**Reason:**	okokok
User:	YUVARAJ N	**Status:**	Pending	**Date:**	2022-04-06	**Reason:**	
User:	YUVARAJ N	**Status:**	Approved	**Date:**	2022-04-06	**Reason:**	
User:	suryakanta GOPIchandreshwar	**Status:**	Edit Request	**Date:**	2022-04-23	**Reason:**	ok
User:	YUVARAJ N	**Status:**	Approved	**Date:**	2022-04-23	**Reason:**	
User:	suryakanta GOPIchandreshwar	**Status:**	Submitted	**Date:**	2022-04-23	**Reason:**	ok
User:	YUVARAJ N	**Status:**	Pending	**Date:**	2022-04-23	**Reason:**	
User:	YUVARAJ N	**Status:**	Approved	**Date:**	2022-06-02	**Reason:**	test

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1.2 Standard Tour Plan: Create Standard Tour Plan

Purpose, Scope and Business functionality

This allows the users to create their Standard Tour Plans into the application. With the help of Standard Tour Plan, the Reps can plan their daily activity schedule and enter the same data into the application. The Reps can enter the data of their meetings with Doctors, Chemists, Stockists etc.

Since our application classifies the Doctors as 1 Visit, 2 Visit, 3 Visit etc. the application helps the reps while planning their activities. For example, if there is a 3 Visit doctor to which the Rep has to visit at least 3 times in a month and the Rep has planned only 2 visits with the Doctor, then the application will not allow submitting the planner without the 3rd visit being planned for the same Doctor.

In the Standard Tour Plan, the days of the week are numbered as Mon1, Tue1, Wed1 etc. for the first week. Mon2, Tue2, Wed2, etc. for the second week and so on and so forth. The application also displays the summary of the Total Customers (Doctors, Chemists, Stockists) planned to be met per day by the Rep.

This Standard Tour Plan can be created only once a year. The same Standard Tour Plan can be reused for creating Monthly Tour Plans.

Technical functionality

Use Case Description: This will allow user to enter details of their Standard Tour Plan into the application

Primary Actor: MR

Precondition: User has valid login credentials and has logged in to the system and has Market Areas and Customers in his account.

Trigger: User clicks on ‘Tour Plans’ in the Menu and clicks on ‘Standard Tour Plan’.

Basic Flow:

1. User clicks on ‘Tour Plans’ in the Menu and clicks on ‘Standard Tour Plan’.

User will be shown a page where he can search the STANDARD TOUR PLAN entered for previous years.

2. User then clicks on the ‘New Standard Tour Plan’ button, to create a New Tour Plan.
3. A pop-up is opened wherein users can select the financial year for which the Tour Plan has to be created. Users can select only the current or the future Year.
4. User selects the Financial Year and then clicks on the ‘New’ button.
5. The user is then shown the following fields:
    a) No: Serial Number
    b) Day: Day of the Week starting from the first Monday of the Month.
    c) Activity Type: The Activity Type will be Field Work.
    d) Patch: The user can select the Patch and on selecting the Market Area (Patch), the Contact will be auto populated in the next column. The user can select multiple Market Area (Patch) and add multiple contacts which he/she wishes to plan to meet on respective day
    e) Contact: The user can select the Contact he/she wishes to plan to meet. Visit Frequency, Class name and Speciality of the Doctor is displayed besides doctor name.
    f) The above fields can be added for all the working days of the month.
    g) Each day in week 1 is named as Monday1, Tuesday1 so on till Saturday1. For the second week it will be Monday2, Tuesday2 so on till Saturday2 & so on.
    h) The User can plan Doctors, Chemists, Stockists.
    i) Visit Frequency & Class name to be displayed besides doctor name.
    j) Depending on the frequency of the doctor visits, the user will have to plan visits to the doctors.
    k) When the doctor is added in the plan, it should show the count available for planning as per the frequency assigned to the doctor.

l) System will not allow you to submit the STANDARD TOUR PLAN until the validation, i.e., frequency of the doctor equals the number of times he has been planned for the month is satisfied. For example, if a user has selected a doctor who has 2 Visit doctors, then the user will have to add that doctor on two different days.

8. The user can then 'Save' or 'Submit' the form.

9. On 'Save', the data gets saved and he/she can edit/modify the data later on.

10. On 'Submit', the STANDARD TOUR PLAN gets forwarded to the higher up for approval.

11. Once the Standard Tour Plan (STP) is submitted then the higher-level user gets notification (on mobile) that 'STP is submitted by user' with user name.

Alternate Flows: If the user clicks on 'New' and then selects the year for which STANDARD TOUR PLAN has already been entered, the user will be shown a message that the Tour plan has already been created.

Validations:

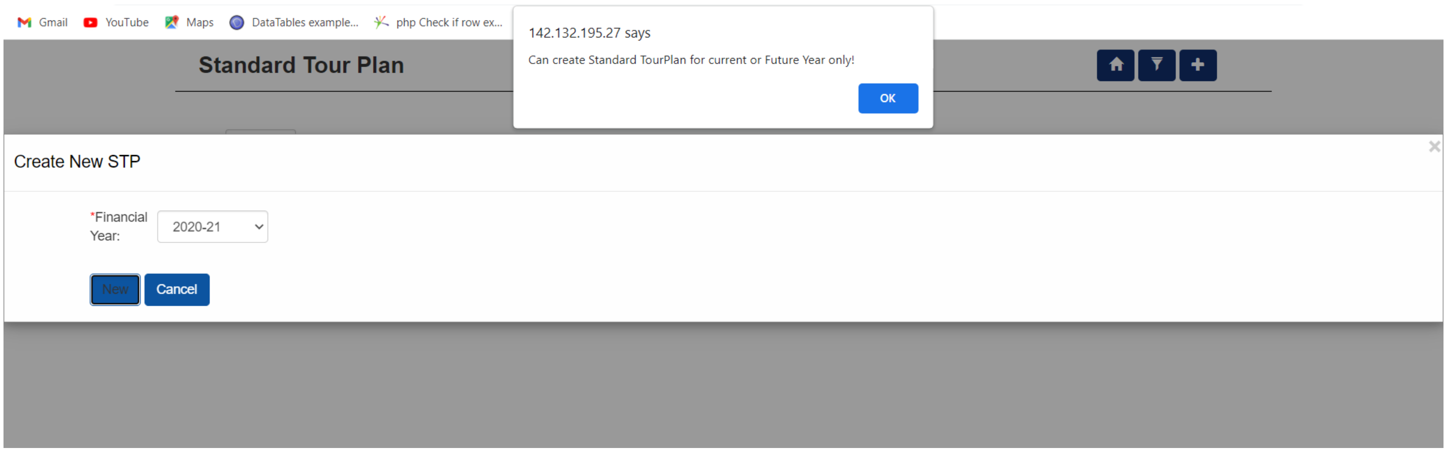
1. Users are allowed to submit STANDARD TOUR PLAN for current and future years.
2. Only one STANDARD TOUR PLAN for a year will be allowed for a user.
3. At least one STANDARD TOUR PLAN creation will be mandatory for MR users only for submission of MTP and DCRs.
4. Latest approved STANDARD TOUR PLAN will be considered for all the future references.
5. Doctors of a particular frequency should be removed from the list once it has been planned as per the frequency.

Post Condition: The Standard Tour Plan data is saved/submitted and then the system displays a success message for the particular user.

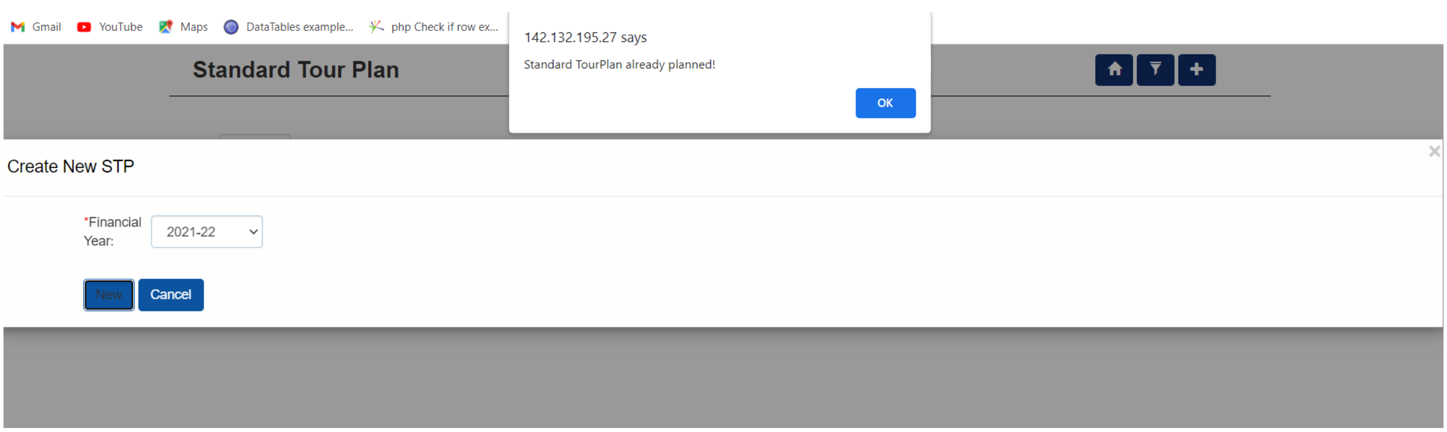
Screenshots

1. Create New Standard Tour Plan (BE user)

➔ If selected previous financial year then it displays the alert message.

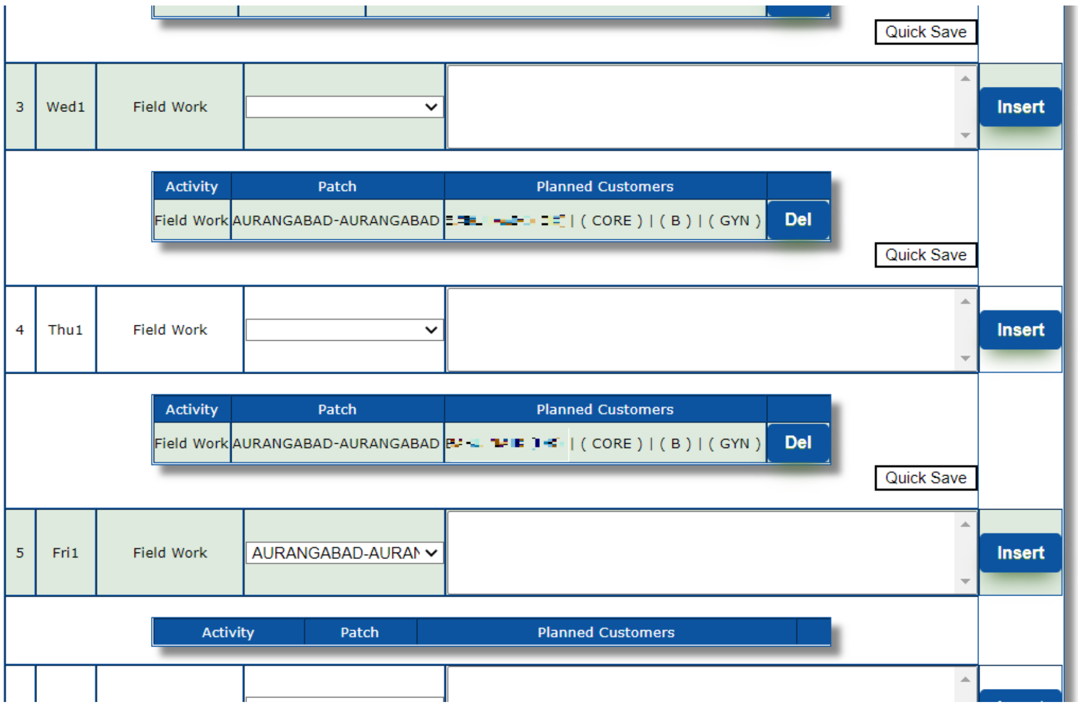


➔ If selected financial year for already planned STP then it displays the alert message.

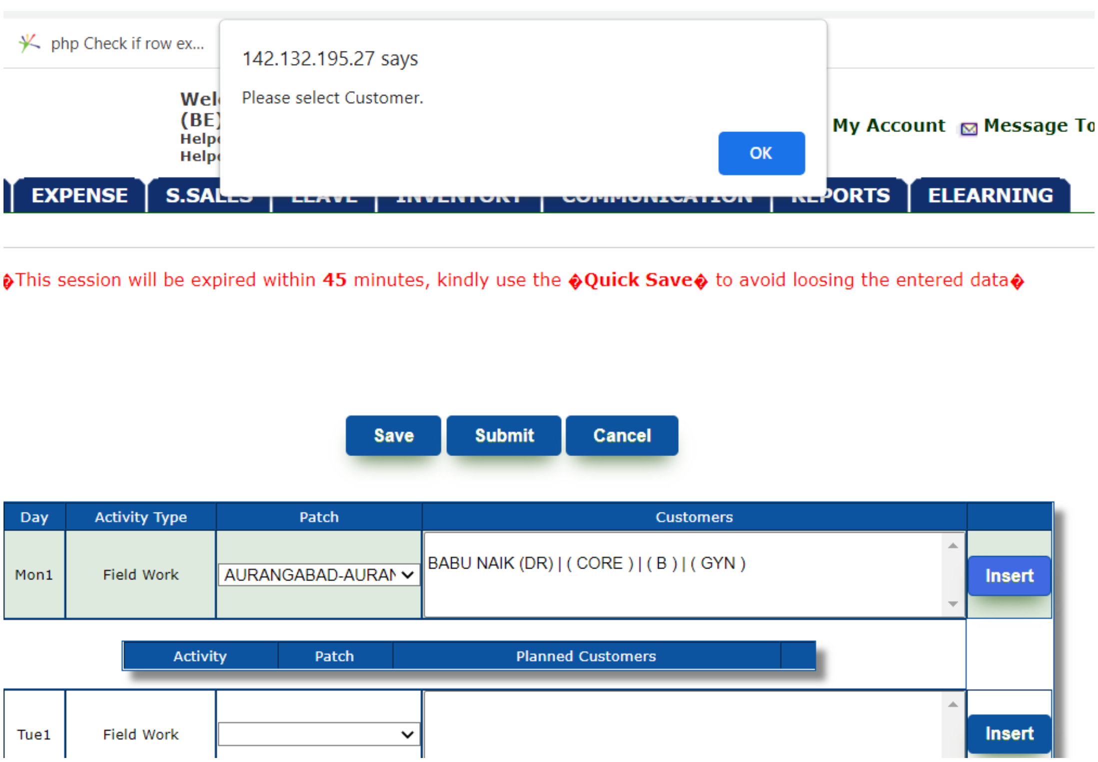


2. STP Created for current Financial Year

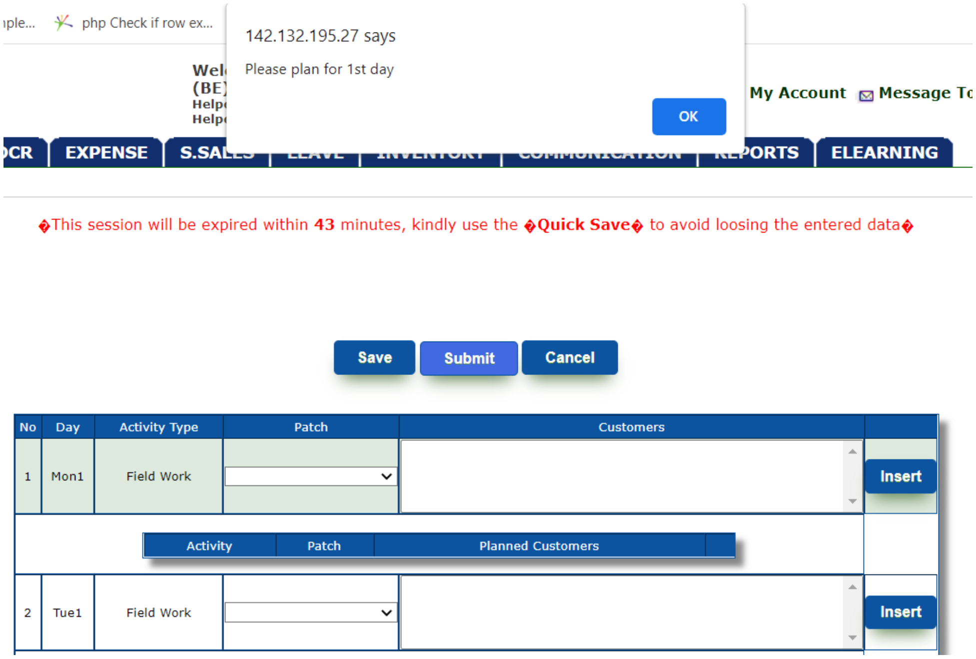
➔ Doctors of a particular frequency should be removed from the list once it has been planned as per the frequency.



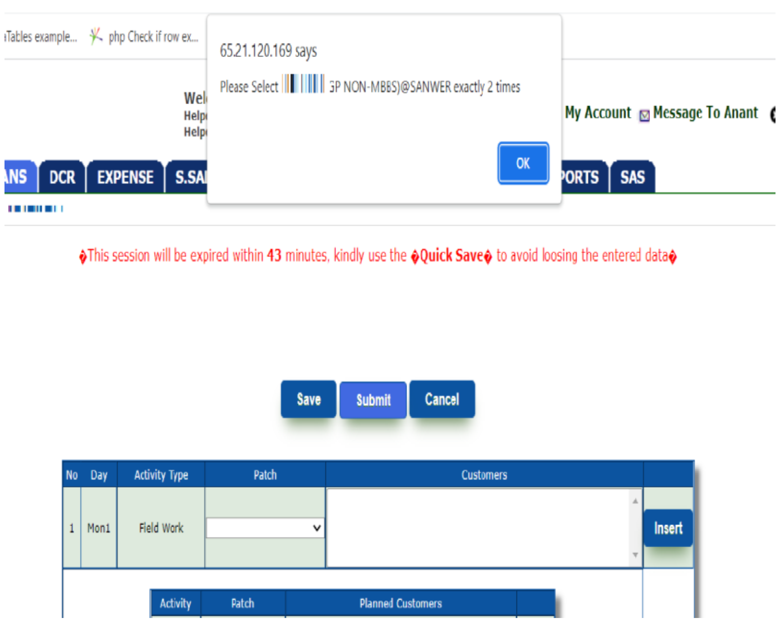
→ When users try to submit STP and customers are not selected.it displays an alert.



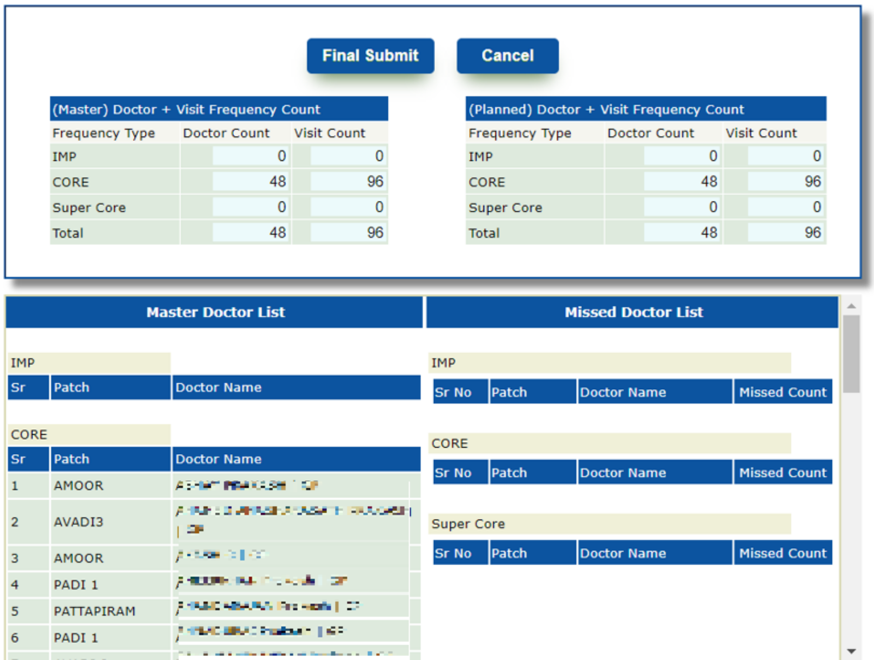
➔ When users try to submit STP and customers are not planned for 1st day.it displays an alert.



➔ If a user has selected a doctor who has 2 Visit doctors, then the user will have to add that doctor on two different days.



➔ On click of submit it displays the Summary of Master Doctor + Visit frequent count, Planned Doctor + Visit Frequency Count, Master Doctor list, Missed Doctor list, Extra Doctor.



(Master) Doctor + Visit Frequency Count		
Frequency Type	Doctor Count	Visit Count
IMP	0	0
CORE	48	96
Super Core	0	0
Total	48	96

(Planned) Doctor + Visit Frequency Count		
Frequency Type	Doctor Count	Visit Count
IMP	0	0
CORE	48	96
Super Core	0	0
Total	48	96

Master Doctor List

IMP

Sr	Patch	Doctor Name

CORE

Sr	Patch	Doctor Name
1	AMOOR	[illegible]
2	AVADI3	[illegible]
3	AMOOR	[illegible]
4	PADI 1	[illegible]
5	PATTAPIRAM	[illegible]
6	PADI 1	[illegible]

Missed Doctor List

IMP

Sr No	Patch	Doctor Name	Missed Count

CORE

Sr No	Patch	Doctor Name	Missed Count

Super Core

Sr No	Patch	Doctor Name	Missed Count

➔ On click of the final submit button the STP gets submitted.

➔ On click of the save button the STP gets saved.

1.3 Standard Tour Plan: Edit Standard Tour Plan

Purpose, scope and Business functionality

This will allow users to edit/modify details of their Standard Tour Plan which has already been created and saved but not yet submitted by the user. As already explained in section 1.1, the Reps can create their Standard Tour Plans and can do it as per their feasible time. For doing so, the Reps will have to Create a Standard Tour Plan and then save it. The Rep can then at a later time edit the plan and add the further data as per their convenience.

Standard Tour Plans which are saved can be edited. Once the Standard Tour Plan is submitted, it's then sent to their Reporting Manager for their approval. The Manager can approve/reject the plan submitted by the Rep.

Technical functionality

Use Case Description: This will allow users to edit/modify details of their Standard Tour Plan which has already been created and saved but not yet submitted by the user.

Primary Actor: MR

Precondition: User has valid login credentials and has logged in to the system and has already created a Standard Tour Plan

Trigger: User clicks on ‘Tour Plans’ in the Menu and clicks on ‘Standard Tour Plan’.

Basic Flow:

1. User clicks on ‘Tour Plans’ in the Menu and clicks on ‘Standard Tour Plan’.
2. User will be shown a page where he/she can see the STANDARD TOUR PLAN entered for previous years.
3. User then clicks on ‘Edit’ for a particular record of the Standard Tour Plan which he/she wants to edit if it is in Save mode.
4. On click of ‘Edit’, the user will be shown the same form containing the data that he had filled while creating the Standard Tour Plan earlier.

5. The user can then enter the remaining data and can Save the form or Submit it for approval of the higher up.

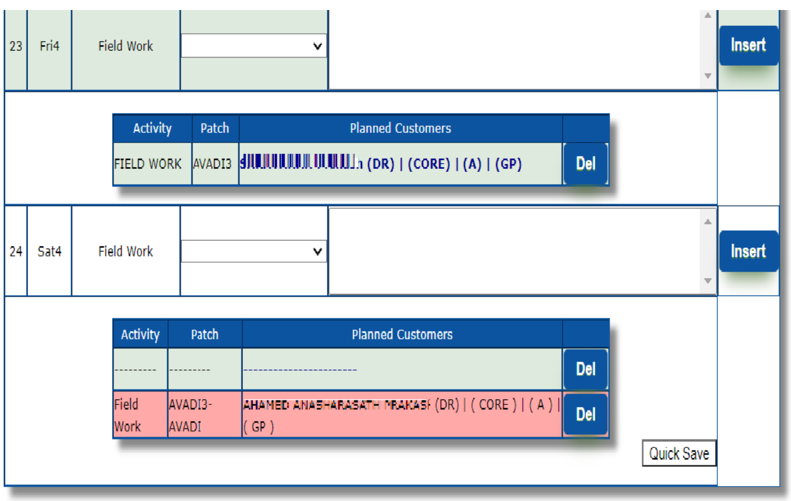
Alternate Flows: Same applicable as in Use case No 1.2

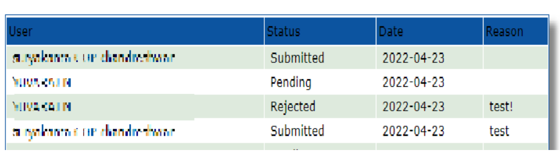
Validations: Same applicable as in Use case No 1.2

Post Condition: The user is able to edit/modify the record successfully and the data is captured into the system and an appropriate message is displayed to the user.

Screenshots

➔ On click of edit the user can edit his STP record and it highlights in red.





1.4 Standard Tour Plan: Delete Standard Tour Plan

Purpose, scope and Business functionality

This will allow the user to delete the Standard Tour Plan which has already been created and saved but not yet submitted by the user. If the Rep thinks that there is an error or mistake in the Standard Tour Plan that is created, he/she can either edit it to correct the data. If the Rep feels that the Standard Tour Plan created is not required, he/she can delete the same using this feature.

Only Standard Tour Plans that have been saved but not submitted and approved by the Managers can be deleted. Submitted and Approved Standard Tour Plans cannot be deleted.

Technical functionality

Use Case Description: This will allow the user to delete the Standard Tour Plan which has already been created and saved but not yet submitted by the user.

Primary Actor: MR

Precondition: User has valid login credentials and has logged in to the system and has already created a Standard Tour Plan

Trigger: User clicks on 'Tour Plans' in the Menu and clicks on 'Standard Tour Plan'.

Basic Flow:

1. User clicks on 'Tour Plans' in the Menu and clicks on 'Standard Tour Plan'.
2. User will be shown a page where he/she can see the STANDARD TOUR PLAN entered for previous years.
3. User then clicks on 'del' for a particular record of the Standard Tour Plan which he/she wants to delete.
4. On click of 'del', the user will be displayed a message asking the user if he/she is sure of deleting the particular record.
5. Upon clicking 'Ok' the particular record will be deleted and if the user clicks on 'Cancel', user will be redirected to STANDARD TOUR PLAN

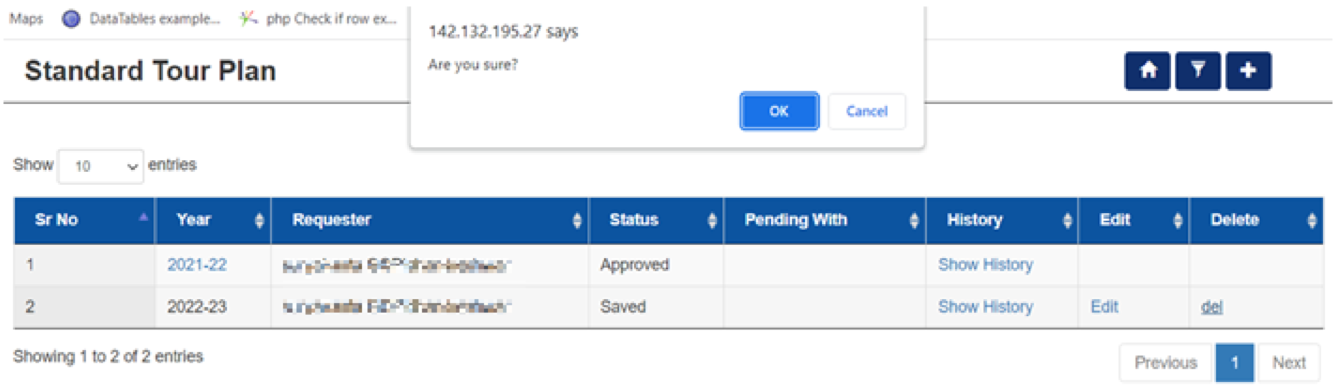
Alternate Flows: Not available

Validations: Only Saved plans can be deleted. Submitted and approved Tour Plans cannot be deleted.

Post Condition: The STANDARD TOUR PLAN gets deleted successfully.

Screenshots

➔ On click of delete button alert gets displayed and on click ok button the STP gets deleted.



1.5 Standard Tour Plan: Approve Standard Tour Plan

Purpose, scope and Business functionality

This will allow higher up users (Managers) to approve Standard Tour Plan of users who are reporting to them. Once the Rep has created the Standard Tour Plan, he/she won't be able to use the same while creating their Monthly Tour Plans without the Standard Tour Plan being approved by the Reporting Manager. Only once the Standard Tour Plan has been approved by the Manager, the same can be used while creating the Monthly Tour Plan.

This feature allows the user (Managers) to approve or reject the Standard Tour Plans of the users requesting for the approval of their Tour Plan.

Technical functionality

Use Case Description: This will allow higher up user (Managers) to approve Standard Tour Plan of users who are reporting to the particular user.

Primary Actor: DM, RM, ZSM, NSM Sales Admin

Precondition: User has valid login credentials and has logged in to the system

Trigger: User clicks on 'Tour Plans' in the Menu and clicks on 'Standard Tour Plan'.

Basic Flow:

1. User clicks on 'Tour Plans' in the Menu and clicks on 'Standard Tour Plan'.
2. Users will be shown a page where he/she can see the STANDARD TOUR PLAN requests pending for approval by users reporting to the current user.
3. To view all STANDARD TOUR PLAN requests, the user needs to click on the Year to open the screen.
4. On click of Year, users will be able to see the details of the STANDARD TOUR PLAN of that particular year, submitted by the users reporting to him where he/she can either approve/reject the STANDARD TOUR PLAN's.
5. If the user wants to approve, then will click on 'Approve' and click on 'Submit'.

6. If the user wants to reject, then will have to enter the reason for rejection and click on 'Reject' and click on 'Submit'.
7. On click of 'Submit' or 'Cancel', users will be redirected to the STANDARD TOUR PLAN listing page.
8. lower-level users will receive a notification (on mobile) once the STP is approved/Rejected by the Manager.
9. Approval will be one level.

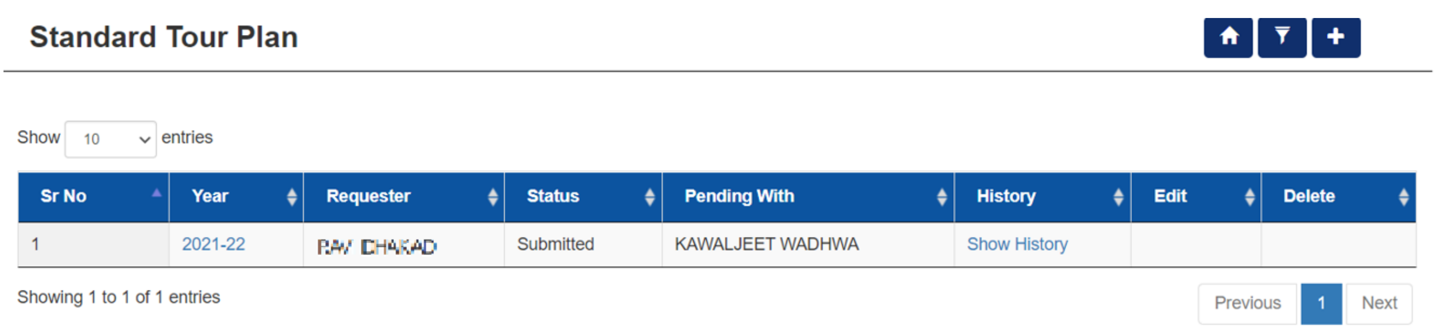
Alternate Flows: Not applicable

Validations: Entering Reason while Rejecting the STANDARD TOUR PLAN is mandatory.

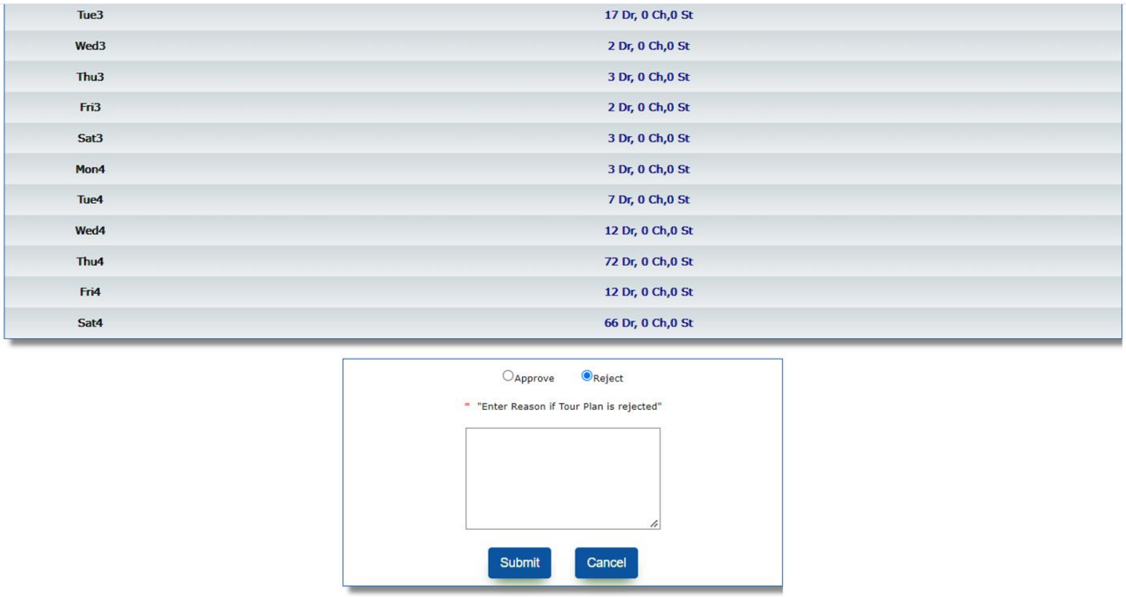
Post Condition: The STANDARD TOUR PLAN gets approved/rejected and the system displays the appropriate message to the user.

Screenshots

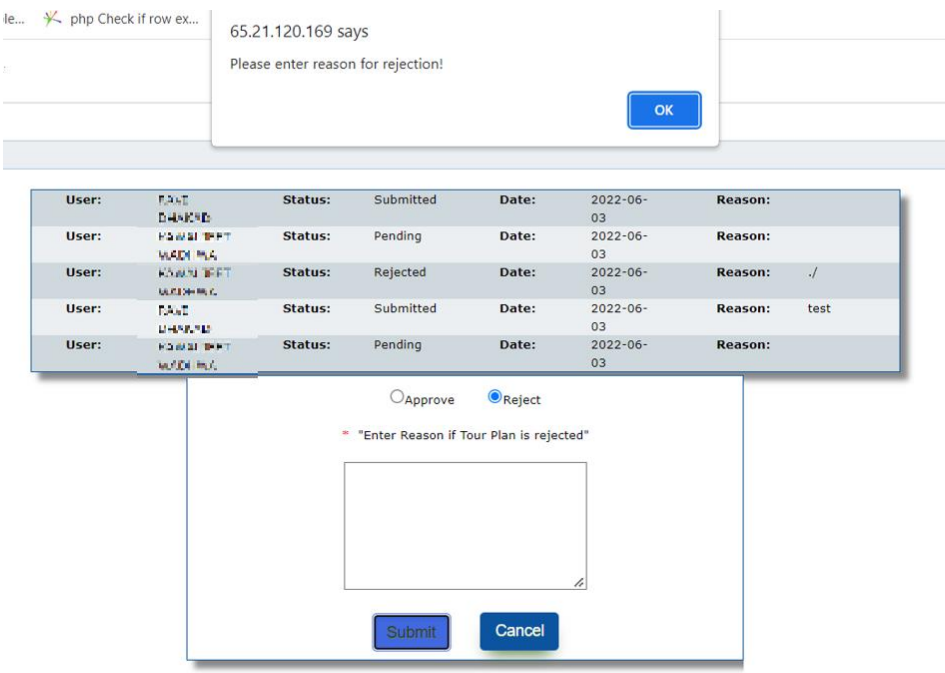
➔ Manager gets the STP submitted request for his lower user for approval in STP listing.



➔ Manager has to click on the year and needs to approve or reject the STP request.



➔ When rejecting, users have to enter a reason.



➔ If the manager approves the request, then the message will be approved successfully.

The STP request is approved successfully.

Proceed

➔ If the manager approves the request, then the status will be approved.

Standard Tour Plan

Show 10 entries

Sr No	Year	Requester	Status	Pending With	History	Edit	Delete
1	2021-22	[illegible]	Approved		Show History		

Showing 1 to 1 of 1 entries

Previous 1 Next

1.6 Standard Tour Plan: Edit/Delete Request Standard Tour Plan

Purpose, scope and Business functionality

This will allow users to request for edit/modify Standard Tour Plan which has already been submitted and approved by the manager user.

Standard Tour Plans which have been submitted and approved can be edited/deleted by requesting edit requests from manager users. Once the edit request is submitted, it's then sent to their Reporting Manager for their approval. Then the Manager can grant edit requests to the Rep.

Technical functionality

Use Case Description: This will allow users to request for edit/modify Standard Tour Plan which has already been submitted and approved by the manager user.

Primary Actor: MR

Precondition: User has valid login credentials and has logged in to the system and has already submitted and approved a Standard Tour Plan

Trigger: User clicks on 'Tour Plans' in the Menu and clicks on 'Standard Tour Plan'.

Basic Flow:

1. User clicks on 'Tour Plans' in the Menu and clicks on 'Standard Tour Plan'.
2. User will be shown a page where he/she can see the STANDARD TOUR PLAN entered for previous years.
3. On click of Year, users will be able to see the details of the STANDARD TOUR PLAN of that particular year, submitted by the user where he/she can either request for edit/delete the STANDARD TOUR PLAN's.
4. User then clicks on the 'Edit/delete request' link then it displays a form where the user has to select edit or delete option.
5. On selecting the 'Edit' option, the user will have to enter the reason for the edit request.
6. The user can then Submit it for approval of the higher up.

7. Once the Standard Tour Plan (STP) is submitted for edit request then the higher-level user (Manager) gets notification (on mobile) that 'STP Edit Request is Submitted by user' with user name.

Alternate Flows:

1. User clicks on 'Tour Plans' in the Menu and clicks on 'Standard Tour Plan'.
2. User will be shown a page where he/she can see the STANDARD TOUR PLAN entered for previous years.
3. On click of Year, users will be able to see the details of the STANDARD TOUR PLAN of that particular year, submitted by the user where he/she can either request for edit/delete the STANDARD TOUR PLAN's.
4. User then clicks on the 'Edit/delete request' link then it displays a form where the user has to select edit or delete option.
5. On selecting the 'delete' option, the user will have to enter the reason for the delete request.
6. The user can then Submit it for approval of the higher up.
7. Once the Standard Tour Plan (STP) is submitted for delete request then the higher-level user (Manager) gets notification (on mobile) that 'STP Delete Request is Submitted by user' with user name.

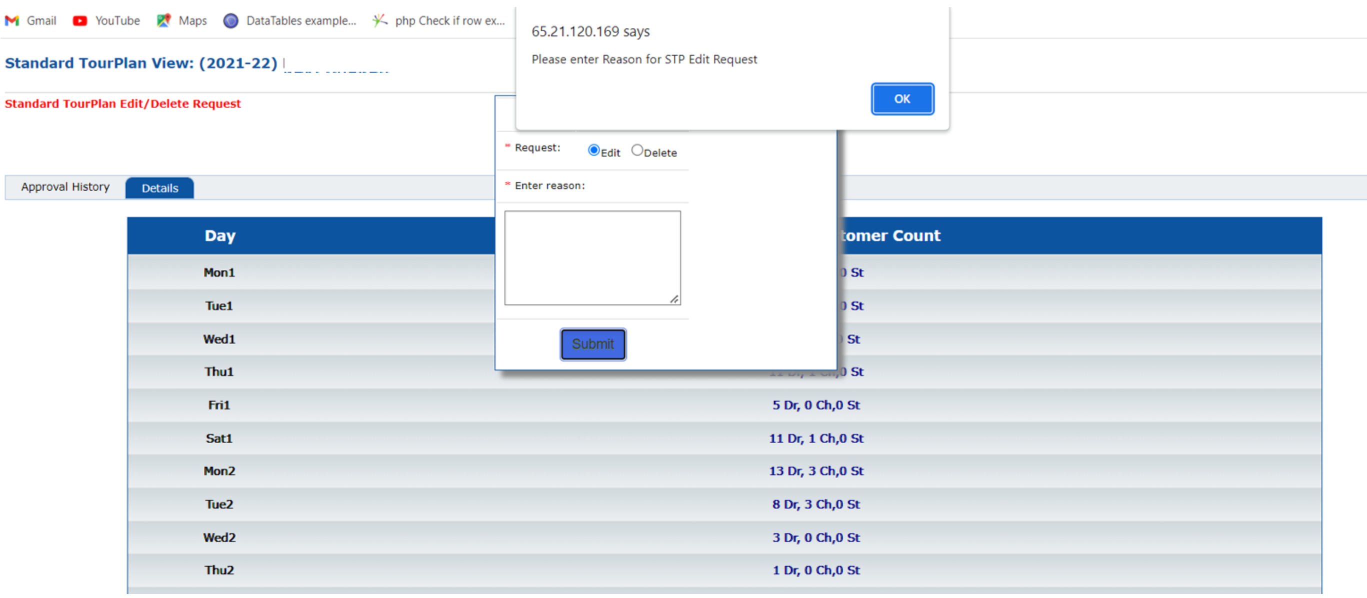
Validations: Entering Reason while submitting edit/delete request for the STANDARD TOUR PLAN is mandatory.

If entered Special characters for Reason while submitting edit/delete requests for the STANDARD TOUR PLAN displays alert.

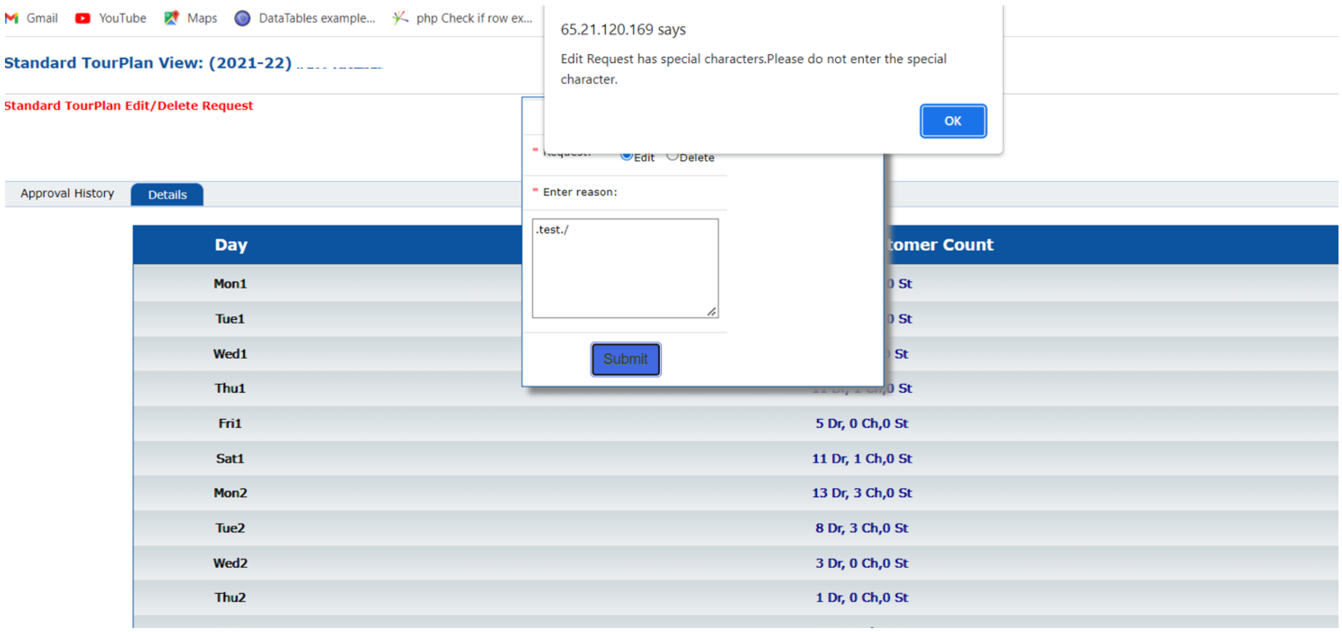
Post Condition: The user is able to submit edit requests successfully and the data is captured into the system and an appropriate message is displayed to the user.

Screenshots

➔ Entering Reason while submitting edit/delete requests for the STANDARD TOUR PLAN is mandatory.

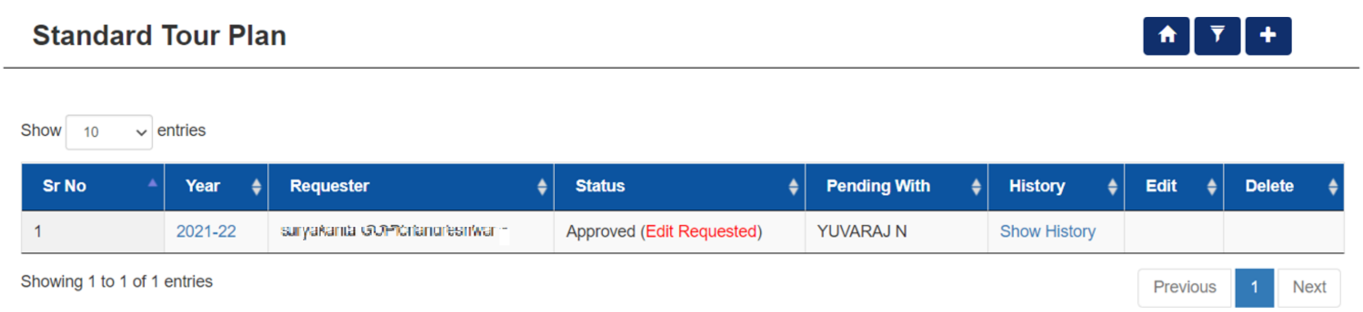


➔ If entered Special characters for Reason while submitting edit/delete requests for the STANDARD TOUR PLAN displays alert.



➔ When submitted, edit request below message displays.

➔ When submitted edit request Status changes to Edit Requested.



1.7 Standard Tour Plan: Grant Edit/Delete request for Standard Tour Plan

Purpose, scope and Business functionality

This will allow higher up users (Managers) to grant edit/delete requests for Standard Tour Plan of users who are reporting to them. Only once the edit/delete requests have been granted by the Manager then the rep. can edit/delete the standard tour plan.

This feature allows the user (Managers) to grant edit/delete requests for the Standard Tour Plans of the users requesting for the approval of their Tour Plan.

Technical functionality

Use Case Description: This will allow higher up user (Managers) to grant edit/delete requests for Standard Tour Plan of users who are reporting to the particular user.

Primary Actor: DM, RM, ZSM, NSM Sales Admin

Precondition: User has valid login credentials and has logged in to the system

Trigger: User clicks on ‘Tour Plans’ in the Menu and clicks on ‘Standard Tour Plan’.

Basic Flow:

1. User clicks on ‘Tour Plans’ in the Menu and clicks on ‘Standard Tour Plan’.
2. Users will be shown a page where he/she can see the STANDARD TOUR PLAN requests pending for approval by users reporting to the current user.
3. To view all STANDARD TOUR PLAN requests, the user needs to click on the Year to open the screen.
4. On click of Year, users will be able to see the link called STP edit request pending of the STANDARD TOUR PLAN of that particular year and on click of that link user is able to see the form, where he/she can grant edit requests for the STANDARD TOUR PLAN.
5. Then the user will click on the grant edit request.
6. Once the STP edit request is granted by the manager (higher level user) then the lower-level user gets notification (on mobile) that ‘STP edit request of user has been granted by manager’ with user name.

Alternate Flows:

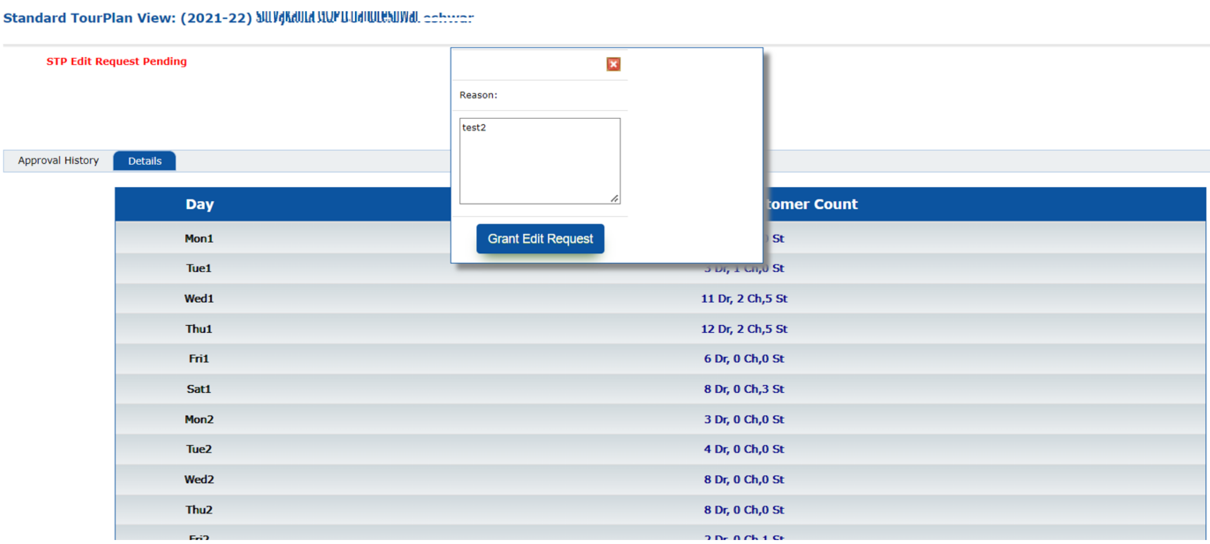
1. User clicks on ‘Tour Plans’ in the Menu and clicks on ‘Standard Tour Plan’.
2. Users will be shown a page where he/she can see the STANDARD TOUR PLAN requests pending for approval by users reporting to the current user.
3. To view all STANDARD TOUR PLAN requests, the user needs to click on the Year to open the screen.
4. On click of Year, users will be able to see the link called STP delete request pending of the STANDARD TOUR PLAN of that particular year and on click of that link user is able to see the form, where he/she can grant delete requests for the STANDARD TOUR PLAN.
5. Then the user will click on the grant delete request.
6. Once the STP delete request is granted by the manager (higher level user) then the lower-level user gets notification (on mobile) that ‘STP delete request of user has been granted by manager’ with user name.

Validations:

Post Condition: The STANDARD TOUR PLAN edit/delete request is granted successfully and the system displays the appropriate message to the user.

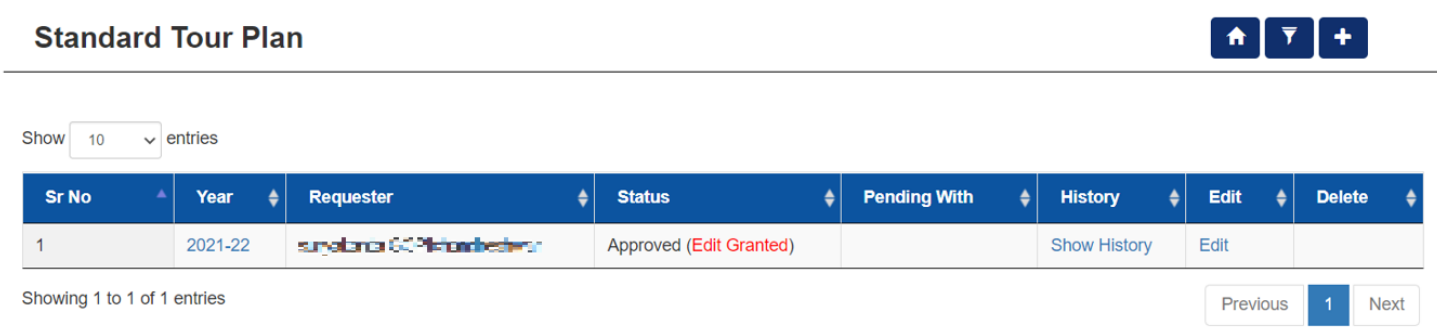
Screenshots

➔ On click of link STP edit request pending, user is able to see the form, where he/she can grant edit/delete requests for the STANDARD TOUR PLAN and enter reason.



➔ When granted an edit request by the manager, the below message displays.

➔ When granted edit request Status changes to Edit Granted.



2. [Module: Tour Plans]

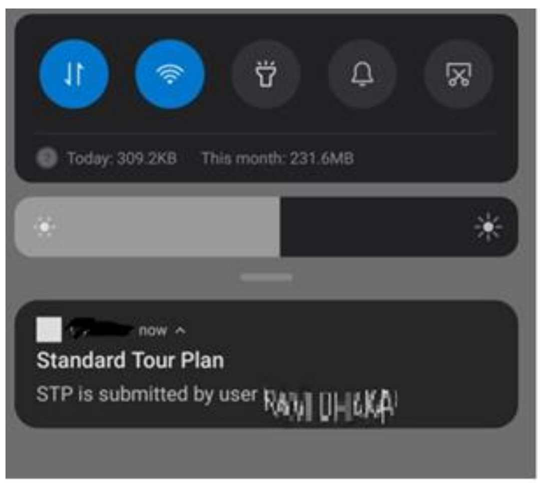
To get notifications on mobile for Manager user once BE User submits or requests for edit/delete STP and to get notifications on mobile for BE user once the STP is being approved or rejected or granted edit/delete requests by Manager.

Precondition

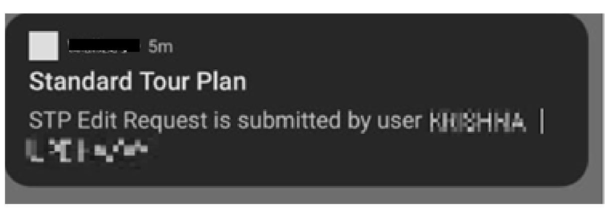
User has valid login credentials and has logged in to the App on mobile.

Screenshots

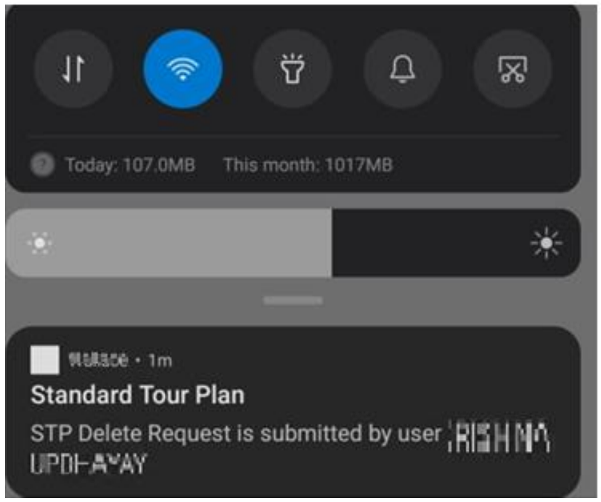
Once the Standard Tour Plan (STP) is submitted then the higher-level user gets below notification (on mobile).



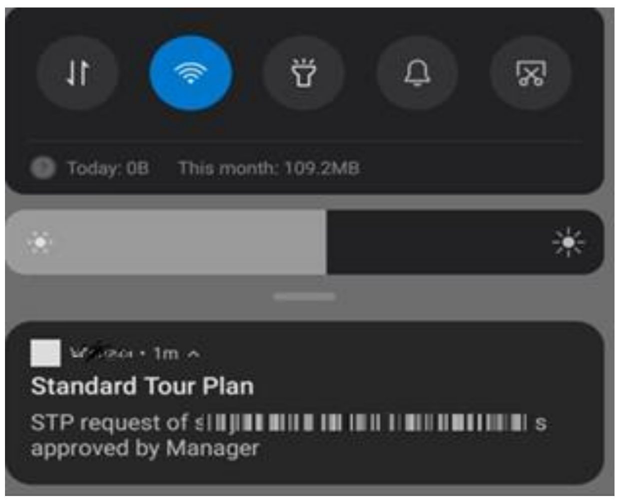
➔ Once the Standard Tour Plan (STP) is submitted for edit request then the higher-level user gets below notification.



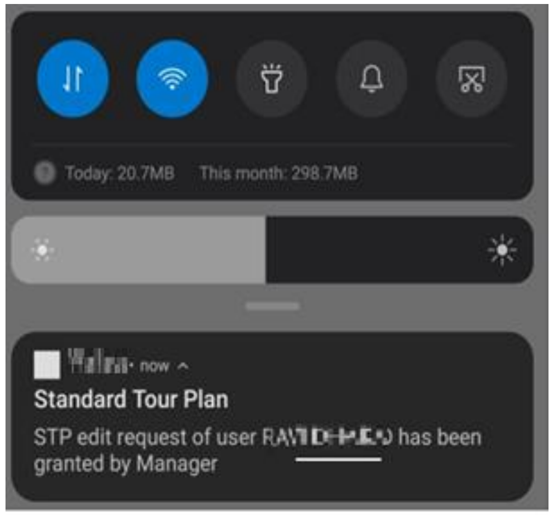
➔ Once the Standard Tour Plan (STP) is submitted for delete request then the higher-level user gets below notification.



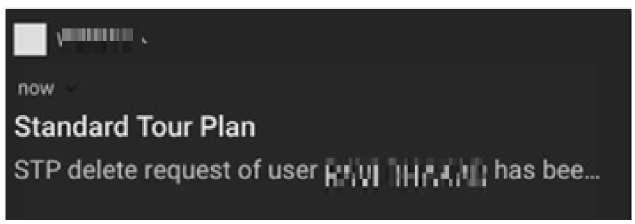
➔ lower-level user will receive a below notification (on mobile) once the STP is approved.



➔ lower-level user will receive a notification (on mobile) once the STP is granted edit requests by the manager.



➔ lower-level user will receive a notification (on mobile) once the STP is granted delete requests by the manager.



2. Monthly Activity Summary Report [Module Reports]

Purpose, Scope and Business functionality

- The Monthly Activity Summary Report will provide the count of parameters like "Field Days", "Attendance Days", "Leave Days", "Listed Doctors Met", "Listed Doctors Visit", "Doctor Call Average" etc. month and year wise with user details.
- The report will be available for all BE, manager and admin users.

Access Route

Login ->Reports-> Standard Reports-> Monthly Activity Summary Report

Technical Functionality

1. The report will provide search criteria and excel generation to display the doctors' details.
2. Once the report is selected from the report list available in Reports module->standard report->general reports->Monthly Activity Summary Report.
3. The user will be redirected to the report feature, which will display a search form.

Search Criteria

1. The search form will contain the following parameters;

   a) Division: This field will be a single select drop-down loading applicable divisions in the system. Division name needs to be selected from the provided options. This will be a mandatory field for admin level users. This field will be displayed only to admin level users.

   b) Role: This will be a single select drop down field loading all the roles (lower levels) available for the division of Logged in User. For admin users the division drop-down needs to be pre-selected and the roles will be all the roles of the selected division. It is mandatory to select the role option to obtain the users and their territory accordingly in the next drop-down field. This field will be displayed to admin and manager level users.

c) User Name: After selecting a role, all the users and their territory according to the role selected will be displayed in this single-select drop down menu. Users/territories in the lower hierarchy team will be considered. It will be a mandatory field for all the users.

d) Fyear: This field will be a single select drop down field loading current and previous financial years. It will be displayed to all users. It will be a mandatory field.

e) From Month: This field will be a single select drop down field loading all months. It will be displayed to all users. It will be a mandatory field.

f) To Month: This field will be a single select drop down field loading all months. It will be displayed to all users. It will be a mandatory field.

2. Along with the search parameters additional 2 button will be provided:

a) Create XL: A button to generate the report output in excel. This button will validate, and on successful validation it will generate a report output in an excel format (.xls extension) for the selected search parameters.
b) Back: To navigate to the report listing. The button will redirect to the standard report list.

Validations on Create XL:

I) All displayed fields will be mandatory for selection to generate the report.

II) For Admin Users division, Role, User Name, Fyear, From Month and To Month fields will be mandatory

III) For manager users (BM, RM, ZM, NSM users) Role, User Name, Fyear, From Month and To Month fields will be mandatory.

IV) For BE users User Name, Fyear, From Month and To Month fields will be mandatory.

Report Output

1. The report output will be provided in excel file depending on the button clicked in the search criteria.
2. The report will provide the count of parameters like “Field Days”,”Attendance Days","Leave Days","Listed Doctors_Met","Listed_Doctors Visit","Doctor Call Average” etc month and year wise with user details, for the selected User.

   Example:

   If the user is logged in, the user has selected fyear as 2022-23, from month as April and to month as June then report will display columns from April month to June for year 2022 with respective parameter counts.
3. The report will be allowed to be generated till NSM level.
4. Below are the field columns which will be provided in the report output;
   a. **Division**: Will display the division name to which the user belongs.
   b. **Username**: Will display the username of the selected user.
   c. **Employee Name**: Will display the full name of the employee(user).
   d. **Employee Number**: Will display the employee code of the selected user.
   e. **DESIGNATION**: Will display the (title) Designation of the selected user.
   f. **Date of Joining**: Will display the date of joining of the selected user.
   g. **HQ**: Will display the patch name (HQ name) of the selected user.
   h. **HQ State**: Will display the state name of the HQ (patch) of the selected user.
   i. **Reporting Manager Name**: Will display the name of the reporting manager of the selected user.
   j. **Parameter**: Will display "Field Days”, “Attendance Days”, “Leave Days”, “Listed Doctors Met”, “Listed Doctors Visit”, Doctor Call Average”, “Listed Doctors POB”,” Listed Chemists Met”, “Listed Chemists Visit”, “Chemist Call Average”, “Listed Chemists

POB","Stockists Met", "Total Stockists Visit","Stockist Call Average", "Total Expense", "Lock Count" and "Release Count" as parameters.

k. The last columns will display the count of respective parameters month and year wise. The headers will change accordingly.

e.g., If the user has selected fyear as 2021-22, from month as April and to month as July it will display headers as April 2021, May 2021, June 2021, July 2021.

Overview of Monthly Activity Summary Report

DOCTOR SPECIALITY/FREQUENCY BREAK UP

Search Criteria:

*indicates required field

*Division: Gastrova *Role: ZM *User Name:

Create XL Back

Server response time: 0.079279 seconds.

Division:	Gastrova
User Name:	suryakanta Gurushandresh war - BE[CHENNAI 4]

Division	User Name	Employee Name	ee Numbe	Designati on	Date of Joining	HQ	HQ State	Reporting Manager Name	Parameter	Apr-2022	May-2022	Jun-2022
Gastrova	sureshgop	suryakanta SURES12 GOPIchandreshwar	211043	BE	2021-01-03	CHENNAI 4	TAMILNADU	YUVARAJ N	Field Days	4	4	
Gastrova	sureshgop	suryakanta SURES12 GOPIchandreshwar	211043	BE	2021-01-03	CHENNAI 4	TAMILNADU	YUVARAJ N	Attendance Days	0	0.5	
Gastrova	sureshgop	suryakanta SURES12 GOPIchandreshwar	211043	BE	2021-01-03	CHENNAI 4	TAMILNADU	YUVARAJ N	Leave Days	1	2	
Gastrova	sureshgop	suryakanta SURES12 GOPIchandreshwar	211043	BE	2021-01-03	CHENNAI 4	TAMILNADU	YUVARAJ N	Listed Doctors Met	4	8	
Gastrova	sureshgop	suryakanta SURES12 GOPIchandreshwar	211043	BE	2021-01-03	CHENNAI 4	TAMILNADU	YUVARAJ N	Listed Doctors Visit	5	12	
Gastrova	sureshgop	suryakanta SURES12 GOPIchandreshwar	211043	BE	2021-01-03	CHENNAI 4	TAMILNADU	YUVARAJ N	Doctor Call Average	1	3	
Gastrova	sureshgop	suryakanta SURES12 GOPIchandreshwar	211043	BE	2021-01-03	CHENNAI 4	TAMILNADU	YUVARAJ N	Listed Doctors POB	3	1207.53	
Gastrova	sureshgop	suryakanta SURES12 GOPIchandreshwar	211043	BE	2021-01-03	CHENNAI 4	TAMILNADU	YUVARAJ N	Listed Chemists Met	3	1	
Gastrova	sureshgop	suryakanta SURES12 GOPIchandreshwar	211043	BE	2021-01-03	CHENNAI 4	TAMILNADU	YUVARAJ N	Listed Chemists Visit	3	2	
Gastrova	sureshgop	suryakanta SURES12 GOPIchandreshwar	211043	BE	2021-01-03	CHENNAI 4	TAMILNADU	YUVARAJ N	Chemist Call Average	0.75	0.5	

3. Doctor Speciality/Frequency Break Up Report

Purpose, Scope and Business functionality

- The Doctor Speciality/Frequency Break Up Report will provide the count of doctors in list and doctors speciality as per the frequency for each of the BE territories (HQ).
- The report will be available for all managers and admin users.
- The report will allow to analyze the data at the BE and each manager level (Area/Regional/Zonal)

Access Route

Login ->Reports-> Standard Reports-> Doctor Speciality/Frequency Break Up Report

Technical Functionality

1. The report will provide search criteria and excel generation to display the doctors' details.
2. Once the report is selected from the report list available in Reports module->standard report->general reports-> Doctor Speciality/Frequency Break Up Report.
3. The user will be redirected to the report feature, which will display a search form.

Search Criteria

1. The search form will contain the following parameters;

   a) Division: This field will be a single select drop-down loading applicable divisions in the system. Division name needs to be selected from the provided options. This will be a mandatory field for admin level user. This field will be displayed only to admin level user.

b) Role: This will be a single select drop down field loading all the roles (lower levels) available for the division of Logged in User. For admin user the division drop-down needs to be pre-selected and the roles will be all the roles of the selected division. It is mandatory to select the role option to obtain the users and their territory accordingly in the next drop-down field. This field will be displayed to admin and manager level user.

c) User Name: After selecting a role, all the users and their territory according to the role selected will be displayed in this single-select drop down menu. Users/territories in the lower hierarchy team will be considered. It will be a mandatory field for all the users.

2. Along with the search parameters additional 2 button will be provided:

a) Create XL: A button to generate the report output in excel. This button will validate, and on successful validation it will generate a report output in an excel format (.xls extension) for the selected search parameters.
b) Back: To navigate to the report listing. The button will redirect to the standard report list.

Validations on Create XL:

I) All displayed fields will be mandatory for selection to generate the report.

II) For Admin Users division, role, user name, fields will be mandatory

III) For manager users (BM, RM, ZM, NSM users) role and user name will be mandatory.

IV) For BE users only user name will be mandatory.

Report Output

1. The report output will be provided in excel file depending on the button clicked in the search criteria.
2. The report will provide the count of doctors in list and doctors speciality as per the frequency for each of the BE territories (HQ).
3. in the selected User's team.

   Example:

   If the User selected is an BE, with respective territory (HQ) only one row will be displayed for the visit category and speciality.

   If the User selected is an BM, who has 3 BE users in hierarchy with respective territories (HQ), then 3 separate rows will be displayed for the visit category and speciality.

   If the User selected is an RM, then BM who reports to that RM with respective territories (HQ) and their BE users who reports to that BM user with respective territories (HQ) is displayed with separate rows for the visit category and speciality. and so on.

4. The report will be allowed to be generated till NSM level.

5. Below are the field columns which will be provided in the report output;
   a. **Division**: Will display the division name to which the user belongs.
   b. **ZM NAME**: Will display the manager's name at the zonal level in the hierarchy of the territory.
   c. **ZM HQ**: Will display the manager SFA HQ name at the zonal level in the hierarchy of the territory.
   d. **RM NAME**: Will display the manager's name at the regional level in the hierarchy of the territory.
   e. **RM HQ**: Will display the manager SFA HQ name at the regional level in the hierarchy of the territory.

f. **BM NAME**: Will display the manager's name at the area level in the hierarchy of the territory.

g. **BM HQ**: Will display the manager SFA HQ name at the area level in the hierarchy of the territory.

h. **BE NAME:** Will display the name of the BE User.

i. **BE HQ**: Will display the SFA HQ name of the BE user in the hierarchy of the territory.

j. **DESIGNATION**: Will display the (title) Designation of the BE User.

k. **Visit Category**: Will display category of doctors i.e., IMP, CORE and SUPER CORE. with respective counts in each category and TOTAL will display the total count of the doctors.

l. **Speciality**: Will display the speciality of the doctor. i.e., CP, GP and GYN.with respective counts in each speciality and TOTAL will display the total count of the doctors.

Overview of Doctor Speciality/Frequency Break Up Report

DOCTOR SPECIALITY/FREQUENCY BREAK UP

Search Criteria:

*indicates required field

*Division: Gastrova *Role: ZM *User Name:

Create XL Back

Server response time: 0.079279 seconds.

Division:	Gastrova
Username:	ANUP UPADHYAYA - ZM[KOLKATA ZONE]

Division	ZM Name	ZM Number	ZM Date Of Joining	ZM Designation	ZM HQ	RM Name	RM Number	RM Date Of Joining	RM Designation	RM HQ	BM Name	BM Number
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	GOURI SHANKR	211118	2022-02-01	RM	Patna state	RAVI KUMAR	208695
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	GOURI SHANKR	211118	2022-02-01	RM	Patna state	RAVI KUMAR	208695
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	SOURAV MUKHERJE	208748	2018-12-07	RM	Kolkata State	TAPAS DUTTA	210963
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	MINTU ROY	208374	2018-09-11	RM	Guwahati State	PRATAP SHAH	211047
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	MINTU ROY	208374	2018-09-11	RM	Guwahati State	PRATAP SHAH	211047
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	SUMAN SARKAR	208378	2018-09-13	RM	Howrah State	[illegible]	210925
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	SUMAN SARKAR	208378	2018-09-13	RM	Howrah State	[illegible]	201973
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	SUMAN SARKAR	208378	2018-09-13	RM	Howrah State	ARINDAM PAUL	211067
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	MINTU ROY	208374	2018-09-11	RM	Guwahati State	DILIP SARMA	208386
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	MINTU ROY	208374	2018-09-11	RM	Guwahati State	DILIP SARMA	208386
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	GOURI SHANKR	211118	2022-02-01	RM	Patna state	[illegible]	210572
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	MINTU ROY	208374	2018-09-11	RM	Guwahati State	NILAM CHAKRABARTY	208457
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	SOURAV MUKHERJE	208748	2018-12-07	RM	Kolkata State	TAPAS DUTTA	210963
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	SUMAN SARKAR	208378	2018-09-13	RM	Howrah State	[illegible]	201973
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	MINTU ROY	208374	2018-09-11	RM	Guwahati State	NILAM CHAKRABARTY	208457
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	MINTU ROY	208374	2018-09-11	RM	Guwahati State	DILIP SARMA	208386
Gastrova	ANUP UPADHYAYA	200205	1997-03-14	ZM	KOLKATA ZONE	GOURI SHANKR	211118	2022-02-01	RM	Patna state	RAVI KUMAR	208695

R SPECIALITY/FREQUENCY BREAK UP

BM Designation	BM HQ	BE Name	BE Number	BE Date Of Joining	BE Designation	BE HQ	Visit Category				Speciality			
							IMP	CORE	Super Core	Total	CP	GP	GYN	Total
BM	Muzaffarpur Area HQ	ABHISHEK KUMAR	208436	2018-09-21	BE	Muzaffarpur		98		98	33	51	14	98
BM	Muzaffarpur Area HQ	A[illegible]K KUMAR	210488	2021-04-14	BE	SITAMARI		88		88	10	52	26	88
BM	KOLKATA SOUTH DM	AMI[illegible] S[illegible]N	209330	2019-08-08	BE	KOLKATA POOL 6				0				0
BM	DIBRUGARH AREA HQ	AN[illegible] MAJUMDAR	208419	2018-10-03	BE	NAGAON POOL 1		70		70	22	38	10	70
BM	DIBRUGARH AREA HQ	ANIRBAN D[illegible]AR	208420	2018-10-03	BE	JORHAT		77		77	28	32	17	77
BM	SILIGURI AREA HQ	[illegible] BISWAS	210708	2021-08-02	BE	BERHAMPORE		39		39	10	21	8	39
BM	Howrah Area Hq	[illegible] SINGH	210845	2021-10-18	BE	KALYANI		84		84	24	45	15	84
BM	MIDNAPUR AREA HQ	[illegible] HAZRA	208499	2018-10-06	BE	Bankura		101		101	29	59	13	101
BM	GUWAHATI AREA HQ	ASHIK BAISHNAB	208672	2018-11-06	BE	SHILLONG		76		76	19	48	9	76
BM	GUWAHATI AREA HQ	A[illegible] SARKAR	208471	2018-10-03	BE	GUWAHATI POOL 1		78		78	26	41	11	78
BM	RANCHI DM	BIKASH [illegible]	210707	2021-08-02	BE	RANCHI 2		61		61	41	14	6	61
BM	SILCHAR AREA HQ	BISHNU [illegible]	210901	2021-11-08	BE	AIZWAL		55		55	29	12	14	55
BM	KOLKATA SOUTH DM	BISHWARUP DEY	209712	2020-02-03	BE	KOLKATA POOL 7				0				0
BM	Howrah Area Hq	BUDDHA ADHIKARY	208488	2018-10-06	BE	Krishnanagar		113		113	19	73	21	113
BM	SILCHAR AREA HQ	[illegible] PAUL	210046	2020-09-14	BE	AGARTALA		49		49	26	15	8	49
BM	GUWAHATI AREA HQ	DINESH SAH	209820	2020-03-09	BE	DHUBRI		72		72	6	61	5	72
BM	Muzaffarpur Area HQ	GAURAV KUMAR	211039	2022-01-04	BE	Samastipur		110		110	19	70	21	110

Other Tasks

To implement the changes in the Leave Module

- ➔ Create a responsive design page for Leave Listing Page.
- ➔ To make the home icon responsive in the leave listing page.
- ➔ To change the router link of the Leave Listing Page to a new link.
- ➔ To change the color of the buttons in the leave listing page.
- ➔ To Add validations to the leave listing page.
- ➔ Resolving issue with alerts on leave listing page.
- ➔ To create a responsive detail view page for the leave listing page.

To implement the changes in the Campaign tagging (Contacts Module) and Campaign Master (DCRs Module)

- ➔ To disable option value chemist in the new campaign module(contacts).
- ➔ To disable option value chemist in the new campaign module (campaign master).
- ➔ To disable option value chemist in customer module.
- ➔ To add validations for campaign master.
- ➔ To Add a corporate doctor field and label with radio buttons and check records in the database.
- ➔ To Add corporate doctor field in detail view.
- ➔ To Make doctor visit plan non mandatory by removing validations.
- ➔ To Add campaign, edit duration label with from and to date, add column in database and add validations.
- ➔ To Remove customer type selection form.
- ➔ To add validations for customer type selection form.
- ➔ To add validation on edit date range to check and uncheck checkbox in campaign tagging edit mode.
- ➔ To check drop-down for campaign master in database and query.
- ➔ To check and resolve issues for status in campaign tagging when submitted shows wrong status.
- ➔ To add and check notification for campaign tagging when submitted.
- ➔ Resolving issue for new campaign tagging button.

- ➔ To add validation for the new campaign tagging button.
- ➔ To check validations for vacant territories.
- ➔ To check and resolve show history issues for some users.
- ➔ To check campaign tagging for profile id 6,7,8 and 9 and sales admin.
- ➔ To check queries for campaign tagging.

To fix the failed test cases of chemist module

In this task, fixed failed test cases such as

- ➔ In Sr no column number was not displayed properly it is overridden by plus symbol.
- ➔ Home and filter Icon alignment changes to the left side.
- ➔ Phone number fields only take 11 digits instead of taking a maximum 15 digits.
- ➔ No special characters except {space, dot, single and double quote}.
- ➔ while selecting date on date picker, click on previous button to select past years does not display year.
- ➔ Pin code is non mandatory but when kept blank, displays error msg "enter valid pin code of 6 digit".
- ➔ When submitted does not display username in pending with column.
- ➔ Displays validation but on submit goes for approval.

Software/Tools & Technologies

HTML 5

HTML5 is a markup language used for structuring and presenting content on the World Wide Web. It is the fifth and current version of the HTML standard. It was published in October 2014 by the World Wide Web Consortium (W3C) to improve the language with support for the latest multimedia, while keeping it easily readable by humans and consistently understood by computers and devices such as web browsers etc.

CSS 3

Cascading Style Sheets (CSS) is a style sheet language used for describing the presentation of a document written in a markup language. Along with HTML and JavaScript, CSS is a cornerstone technology used by most websites to create visually engaging web pages, user interfaces for web applications, and user interfaces for many mobile applications. CSS is designed to enable the separation of presentation and content, including layout, colors and fonts.

Bootstrap

Bootstrap is a free and open-source CSS framework directed at responsive, MobileFirst front-end web development. It is a framework to help you design websites faster and easier. It includes HTML and CSS based design templates for typography, forms, buttons, tables, navigation, modals, image carousels, etc. It also gives you support for JavaScript plugins. Advantages of Bootstrap are Easy to use, Responsive features, Mobile-first approach and Browser Compatibility.

JavaScript

JavaScript is a high-level, dynamic untyped and interpreted programming language. Alongside HTML and CSS, it is one of the three core technologies of world wide web content production. The majority of the websites employ it and it is supported by all modern Web browsers without plugins. JavaScript is prototype based with first class function, making it a multi-paradigm language, supporting object oriented, imperative and functional programming styles. It has an API for working with text, arrays, dates and regular expressions, but does not include any I/O, such as networking, storage or graphics facilities, replying for these upon the host environment in which it is embedded.

Ajax

Ajax is a set of web development techniques using many web technologies on the client side to create asynchronous web applications. With Ajax, web applications can send and retrieve data from a server asynchronously (in the background) without interfering with the display and behavior of the existing page. By decoupling the data interchange layer from the presentation layer, Ajax allows web pages and, by extension, web applications, to change content dynamically without the need to reload the entire page.

MySQL

MySQL is the most popular Open-Source Relational SQL Database Management System. MySQL is one of the best RDBMS being used for developing various web-based software applications. It is a very powerful program in its own right. It handles a large subset of the functionality of the most expensive and powerful database packages. MySQL uses a standard form of the well-known SQL data language. MySQL works on many operating systems and with many languages including PHP, PERL, C, C++, JAVA etc.

jQuery

jQuery is a fast, small, and feature-rich JavaScript library. It makes things like HTML document traversal and manipulation, event handling, animation, and Ajax much simpler with an easy-to-use API that works across a multitude of browsers. With a combination of versatility and extensibility, jQuery has changed the way that millions people write JavaScript.

The jQuery library contains the following features:

· HTML/DOM manipulation
· CSS manipulation
· HTML event methods

PHP

PHP is a recursive acronym for "PHP: Hypertext Preprocessor". The PHP Hypertext

Preprocessor (PHP) is a programming language that allows web developers to create dynamic content that interacts with databases. PHP is basically used for developing web based software applications. It is a server-side scripting language that is embedded in HTML. It is used to manage dynamic content, databases, session tracking, even building entire e-commerce sites. It is integrated with a number of popular databases, including MySQL, PostgreSQL, Oracle, Sybase, Informix, and Microsoft SQL Server. PHP is pleasingly zippy in its execution, especially when compiled as an Apache module on the Unix side. The MySQL server, once started, executes even very complex queries with huge result sets in record-setting time. It supports a large number of major protocols such as POP3, IMAP, and LDAP. PHP4 added support for Java and distributed object architectures (COM and CORBA), making n-tier development a possibility for the first time. performs system functions, i.e., from files on a system it can create, open, read, write, and close them. Using PHP, you can restrict users to access some pages of your website. It can encrypt data.

FileZilla

FileZilla is a free software, cross-platform FTP application, consisting of FileZilla Client and FileZilla Server. Client binaries are available for Windows, Linux, and mac OS, server binaries are available for Windows only. Both server and client support FTP and FTPS (FTP over SSL/TLS), while the client can in addition connect to SFTP servers. Some features of FileZilla are:

- ➔ Transfer files using FTP and encrypted FTP such as FTPS (server and client) and SFTP.
- ➔ Support IPv6 which is the latest version of internet protocol.
- ➔ Supports resume which means the file transfer process can be paused and continued.
- ➔ Drag and drop to download and upload.
- ➔ Configurable transfer speed limits to limit the speed transferring the files, which helps reduce error of transferring.
- ➔ Filename filters, users can filter only specific files that have the conditions they want.

Navicat

Navicat is a series of graphical database management and development software produced by Premium Soft CyberTech Ltd for MySQL, MariaDB, MongoDB, Oracle, SQLite and Microsoft SQL Server. It has an Explorer-like graphical user interface and supports multiple database connections for local and remote databases. Its design is made to meet the needs of a variety of audiences, from database administrators and programmers to various businesses/companies that serve clients and share information with partners.

Some features of Navicat are: -

- ➔ code snippet.
- ➔ visual query-builder.
- ➔ import and export and backup of data.
- ➔ report builder.
- ➔ data modeling.
- ➔ task scheduling and wizard’s tool.
- ➔ data and structure migration and synchronization.

Internship Timeline

January 2022

Week 2:

- ➔ To Learn bootstrap
- ➔ SFA Training (Explanation on modules of website).
- ➔ To install Navicat and FileZilla software.
- ➔ To take approval for read, write access on server and read access of DB.
- ➔ Create a responsive design page for Leave Listing Page.

Week 3:

- ➔ SFA Training (Organogram).
- ➔ To make the home icon responsive in the leave listing page.
- ➔ To change the router link of the Leave Listing Page to a new link.
- ➔ To change the color of the buttons in the leave listing page.
- ➔ To Add validations to the leave listing page.
- ➔ Resolving issue with alerts on leave listing page.
- ➔ To create a responsive detail view page for the leave listing page.
- ➔ To create a responsive listing page for STP.
- ➔ To make the home icon responsive in the STP page.
- ➔ To make a new STP button and pop-up modal responsive.
- ➔ Resolving search button issue and adding validations for alerts.
- ➔ To make the show history page responsive on the STP page.

Week 4:

- ➔ To change icons for search and new STP button.
- ➔ To change filter color.
- ➔ To create a responsive detail view page for the STP module.
- ➔ To work on the summary part of the detailed view for STP.
- ➔ made some UI changes in the detail view for STP.
- ➔ To file a new STP and check approval and rejection for STP detail view.
- ➔ To check edit view approval for lower-level users and granted access for higher

level users.

- ➔ To check all the validations for STP.
- ➔ To route old links to new links for STP.
- ➔ To add header to STP list view page and change color of the icons.

February 2022

Week 1:

- ➔ To change detail view summary tab to details
- ➔ To check STP working on mobile UI and modify.
- ➔ To disable option value chemist in the new campaign module(contacts).
- ➔ To disable option value chemist in the new campaign module (campaign master).
- ➔ To disable option value chemist in customer module.
- ➔ checked validations for campaign master.
- ➔ changed label Market/Area to patch in edit view page for STP.
- ➔ To add validation for the new button on STP list view responsive file.
- ➔ To make save STP and Authorize pages responsive.
- ➔ To make save STP, Authorise STP and delete request pages responsive.
- ➔ To remove headers from Authorise STP and delete request pages and align title Standard your plan.

Week 2:

- ➔ To check all the validations for STP.
- ➔ To read SRS documents for STP and note changes and to correct validations for sales admin user.
- ➔ To Add a corporate doctor field and label with radio buttons and check records in the database.
- ➔ To Add corporate doctor field in detail view.
- ➔ To Make doctor visit plan non mandatory by removing validations.
- ➔ To Add campaign, edit duration label with from and to date, add column in database and add validations.
- ➔ To Remove customer type selection form.

Week 3:

- ➔ To add validations for customer type selection form.
- ➔ Resolving issue with corporate doctor option in edit mode.
- ➔ Review call.
- ➔ Removed customer type selection form for lower-level user and hidden customer type field for higher level user.
- ➔ Resolving issue with validations for customer type selection for lower-level users.
- ➔ To make changes in the SRS document for STP module.
- ➔ Resolving issue with validation for customer type selection for lower-level users.
- ➔ Resolving issues with validation for customer type selection for higher level users.

Week 4:

- ➔ Learning jQuery.
- ➔ To change tab color to blue in detail view for STP and make by default details tab open.
- ➔ To Add color to planned customers and make font bold in detail view for STP.
- ➔ To add edit request and delete request in status in responsive page as per old page.
- ➔ To check approval status for STP responsive and old pages for higher up and lower up users.
- ➔ To Add edit requested and delete requested in STP responsive page and checked.
- ➔ To change the cursor to show history on STP page.
- ➔ Resolving pending with name issue.
- ➔ To Add validations for edit and delete and check approval.
- ➔ To make only pending and submitted records displayed for listing in STP.

March 2022

Week 1:

- ➔ To add font color to planned customers for STP edit view page.
- ➔ To make edit delete option visible for rejected, saved status and checking for approval.
- ➔ To make only the edit option visible for edit granted status.

- ➔ To get notification for higher up users when STP being submitted for approval.
- ➔ To install and check Mobile App.
- ➔ To understand code for push notification.
- ➔ To get notification for higher up users when STP being submitted for edit and delete requests.
- ➔ To check notifications on mobile apps for higher up users.
- ➔ To add future financial year in the table and added validation for creating new STP. (Test case failed)
- ➔ Resolving issue for listing (testcase which is failed).
- ➔ Resolving issue for sr.no. hiding for mobile responsive. (Testcase which is failed)
- ➔ checking notifications on mobile apps for lower up users.
- ➔ Resolving sorting for listing.

Week 2:

- ➔ To remove doctors once it has been planned on edit view page for division 12(failed test case)
- ➔ To display planned doctor + visit frequency count table for division 12(failed test case)
- ➔ To check campaign tagging form.
- ➔ Demo session for STP.
- ➔ To fix issues for STP.
- ➔ To change color for headers in the show history page.
- ➔ To check for division 5 in summary for imp, core.
- ➔ Resolving cancel button issue for division 5.
- ➔ To check notification for saving STP and resolving the issue.
- ➔ To add validation for campaign tagging edit date range, check files and code.
- ➔ To check corporate doctor in edit view and fix.

Week 3:

- ➔ To check files and code for the show data function.
- ➔ To work on ajax call for edit date range.
- ➔ To add validation on edit date range to check and uncheck checkbox in campaign

tagging edit mode.

- ➔ To check drop-down for campaign master in database and query.
- ➔ To check and resolve issues for status in campaign tagging when submitted shows wrong status.

Week 4:

- ➔ Demo session of campaign tagging.
- ➔ Updating SRS for STP module.
- ➔ To change button names, corporate doctors uncheck and remove validation for visits for campaign tagging.
- ➔ To add validation for edit date range and update SRS for campaign tagging module.
- ➔ To add and check notification for campaign tagging when submitted.
- ➔ Resolving issue for new campaign tagging button.
- ➔ To check validation for the new campaign tagging button.
- ➔ To check validations for vacant territories.
- ➔ To check and resolve show history issues for some users.
- ➔ To check campaign tagging for profile id 6,7,8 and 9 and sales admin.
- ➔ To check queries for campaign tagging reports.

Week 5:

- ➔ FTP and DB approval for new site.
- ➔ To check the STP module on a new site.
- ➔ To get no data available for campaign tagging report for profile I'd 7,8.
- ➔ To check the STP module on a new site and resolve issues.
- ➔ To check the STP module on a new site and resolve issues and check new STP.
- ➔ To check the STP module on a new site and resolve show history issues.
- ➔ To check the campaign tagging module and check the validation issue.

April 2022

Week 1:

- ➔ To resolve validation issues for campaign tagging in a new site.

- ➔ To resolve issues for the financial year for STP in a new site.
- ➔ To check campaign tagging for profile 5,6,7,8 in a new site.
- ➔ To resolve the issue of a corporate doctor in edit mode in a new site.
- ➔ To add validation for special characters for edit requests in a new site.

Week 2:

- ➔ To check the chemist module failed test cases.
- ➔ fixed 2 test cases.
- ➔ To add 10 doctors and 4 chemists per day in STP.
- ➔ To check queries for class and frequency and create insert queries for class and frequency to add data.
- ➔ Resolving issue for class and frequency not loading for campaign master issue (added new for fyear 2022-23).
- ➔ Resolving the newly created campaign was not getting loaded for campaign tagging (due to financial year issue in database) updated data.
- ➔ finding file for listing campaigns for campaign master.
- ➔ To list campaigns in descending order.
- ➔ To add validation for listing campaigns.
- ➔ To Add campaigns for 3 users and tag doctors.
- ➔ To check planner reports (STP).

Week 4:

- ➔ To check planner reports (MTP and STP).
- ➔ To check and update failed test cases in xl sheet for campaign tagging.
- ➔ To Add validation for special characters and remarks in campaign tagging.
- ➔ To add chemists, stockists for BE users from Frontend and DB.
- ➔ Resolve issue for notification on new creating campaign tagging.
- ➔ To check queries and run in dB for role, division, username, speciality etc.
- ➔ To make the pop-up page responsive.
- ➔ Resolve issue for browser back button without clicking on proceed button.

- ➔ To check STP on a live site and notifications on the app.
- ➔ updating SRS and XL sheet documents.

Week 5:

- ➔ To update excel sheets for campaign tagging and chemist modules.
- ➔ To check code for campaign tagging (If allowed editing for manager user).
- ➔ To fix chemist module failed test cases (fixed 2 failed test cases).
- ➔ To fix the chemist module failed test cases (fixed 3 test cases).
- ➔ To fix failed test cases for the Chemist module (fixed 2).
- ➔ Resolving issue when saving STP module edit del option not coming for live site.

May 2022
Week 1

- ➔ To fix 2 test cases alignment issues for icons and upload updated changes on a new site.
- ➔ To check the MCL dump report.
- ➔ Resolve issue while downloading csv file for MCL dump report.
- ➔ To check all reports if doctor data is doctor wise.
- ➔ To add 2 campaigns for user and sort issue for campaign tagging listing.
- ➔ To add cols doctor id and doctor code for doctor details + visit summary report.
- ➔ To Add columns for MCL dump report and making changes for csv file.
- ➔ To map area and specialty wise reports.

Week 2

- ➔ To check queries and change header names to respective usernames for area and specialty wise report.
- ➔ To check doctor count total and specialization for BE users and verify in reports.
- ➔ To check query for doctor classification and resolving issues for brick id (was not there in contact_wise_bricks table).
- ➔ To change queries, check in navicat and make changes in code. (Removing area column and one user will have one row)
- ➔ To make changes in code, create SRS for Doctor Speciality/Frequency Report.

- To check and make changes in SRS.
- To create search criteria for Monthly activity summary report and add validation for months fields.
- To create xl sheet code for monthly activity summary report and building queries.

Week 3

- To create a program for from_month and to_month to display in xl sheet.
- To create logic to display months and year in xl sheet.
- To create data for parameters by creating an array.
- To display user data repeated rows.
- To Create SRS for monthly summary report.

Week 4

- To display rows for parameters from the table.
- To fix the query for fyear.
- To verify data and add validation for from_month and to_month for one financial year.
- To check validation for all cases.
- To add employee details for doctor speciality/ frequency break up report.
- To update SRS for Doctor speciality/frequency report.

Week 5

- To create a document for STP status report output.
- To Add Zone, region, area, hq for STP status report.

June 2022

Week 1

- To add and update query for Zone, region, area, hq, employee code, title, division columns for STP status report for generate and excel report.
- To add and update query for Zone, region, area, hq, title, division, employee code

columns for doctor details report for generate and excel report.

- To add and update query for Zone, region, area, hq, title, division, employee code columns for MTP status report for generate and excel report.
- To add and update query for Zone, region, area, hq, title, division, employee code columns for SFC data extract generate and excel report.
- To add and update query for Zone, region, area, hq, title, division, employee code columns for daily register report for generate and excel report.

Overall Experience At AIPL

My Internship at AIPL has been a wonderful and growing experience. This has given me insights into the software world and how things actually work in the industry. The internship has been very technical and has improved my technical knowledge tremendously.

I was fortunate to receive training as part of my internship. As I reflect on all we have learned, I realize that this has been a great experience. It has served as a beneficial ending to my formal education. Skills such as multitasking, communicating, learning to deal with diversity, and dealing with deadlines. Also learnt that learning and keeping ourselves up-to-date with new technologies is as important as working on any technology. The biggest skill that was enhanced during the internship was the ability to adapt and learn.

Overall, I'm glad to be a part of AIPL and looking forward to facing new challenges with the knowledge that I have acquired here.

Terminologies

DCR: Daily Call Reporting.
STP: Standard Tour Plan.
NSM: National Sales Manager.
RM: Regional Manager.
ZM: Zonal Manager.
BM: Business Manager.
BE: Business Executive.

Modules Worked on

TourPlans
Ajax
Contacts
DCRs
Users
Reports
Home

References

https://www.w3schools.com/
https://stackoverflow.com/
https://www.tutorialspoint.com/
https://www.youtube.com/