

Below points are related to ***Team Users***

1.

Attention

Visit

Planned - 00630

Planned *
03/05/2025

Customer *
Al Warsan Nursery

Contact Number

Customer Phone *
0555998029

Salesman
Imtiaz Ahmad

Contact *
Mr Yaseen

Purpose of visit *
Daily tasks.
Meeting at Diatech office.

The option to approve or reject location statuses should be accessible only to admin users. This functionality must not be available to sales team members or their team leaders. The responsibility of verifying the recorded locations based on the visit reports and GPS data rests solely with the admin.

Actual

Status
Visited

End Time
02:53:00

Location Status
Pending

Visited type
Dubai Municipality Daily Tasks

Customer Location *
Al Warsan Nursery

Visit Notes*
Joined DM Al Warsan.
Performed daily tasks.
Attended a meeting at Diatech office.
Joined back DM Al Warsan.

Start Time
07:56:00

Show 10 entries

Close Save

Search:

The option to approve or reject location statuses should be accessible only to admin users. This functionality must not be available to sales team members or the team leaders. The responsibility of verifying the recorded location based on the visit reports and GPS data rests solely with the admin.

2.

Attention

Visit

Planned - 00630

Planned *
03/05/2025

Customer *
Al Warsan Nursery

Contact Number

Customer Phone *
0555998029

Salesman
Imtiaz Ahmad

Contact *
Mr Yaseen

Purpose of visit *
Daily tasks.
Meeting at Diatech office.

The fields marked with a red box are mandatory and must be completed before the report can be saved. The system should restrict users from saving the report if any of these required fields are left blank. The same validation rules should be consistently applied when entering both the visit plan and the visit report.

Actual

Status
Visited

End Time
02:53:00

Location Status
Pending

Visited type
Dubai Municipality Daily Tasks

Customer Location *
Al Warsan Nursery

Visit Notes*
Joined DM Al Warsan.
Performed daily tasks.
Attended a meeting at Diatech office.
Joined back DM Al Warsan.

Start Time
07:56:00

Show 10 entries

Close Save

Search:

The fields marked with a red box are mandatory and must be completed before the report can be saved. The system should prevent users from saving the report if any of these required fields are left blank. The same validation rules must be consistently enforced for both the visit plan and the visit report. When any status is

selected (**Visited, Cancelled, or Postponed**), providing feedback must be mandatory. Additionally, the title “**Visit Notes**” should be changed to “**Visit Feedback.**”

3. Customer creation and contact person creation –

Currently, sales team members have the ability to create new customers by clicking the "+" (Add) button. They can then proceed to complete their visit plans by selecting these newly created customers. However, there is a challenge in the current workflow: the admin team is unable to easily identify which customers have been newly added by the sales team and which records require verification, updating, and approval.

To address this issue, we require a feature that clearly flags or categorizes newly created customers. This will allow the admin team to efficiently review, update, and approve these records before they become active in the official customer list.

- 4. Once a visit plan is saved, the editing option should no longer be available to the user. If there is a requirement to edit or delete then the admin only should have permission to do it. (Already mentioned in my previous request and this is still pending)**
- 5. Once the user records the visit status, the contact person's name and phone number—selected during the creation of the visit plan—should be displayed by default. If the user needs to update the contact person they met, there should be an option to add and select a new contact. This should include fields for the contact's name, phone number, and email address. Any newly added contact should be subject to admin verification before being saved to the contact list. (Already mentioned in my previous request and this is still pending – please check and update it)**
- 6. The “Salesman” dropdown option should be removed for Sales team users. Instead, the field should automatically populate with the logged-in user's name by default. (Already mentioned in my previous request and this is still pending – please check and update it)**

Visit Log – Access Control Requirements

- **Sales Team Users:**
Sales team members should have access **only to their own** visit plans. They **must not** be able to view, edit, or manage the visit plans of other team members.
Currently, this restriction is not enforced, allowing unintended access to other users' data. This permission should be revoked immediately to maintain data security and ensure proper role-based access.
- **Sales Team Leaders:**
Sales team leaders should have visibility **only into the visit plans and reports of their assigned team members**.
Please implement a feature that allows the assignment of team leaders and the mapping of their respective team members.

The team leader should have access to view the visit logs, visit summaries, and reports of their respective sales team members. However, when access to the summary and report sections is currently enabled for a team leader, it grants visibility into the details of all sales team members, rather than limiting access to only those assigned under their supervision. This access should be restricted to allow the team leader to view information pertaining solely to their allocated team members.

Below points are related to ***MANAGEMENT DASHBOARD***

1. The system should include fields that indicate which salesperson's have recorded their daily visit plans and which have not. For those who have submitted their plans, the exact time of entry should also be captured.

The information table should display the following details:

Salesperson Name

Reporting Sales Team Leader

Department

This will provide management with a clear overview of daily visit plan submissions and help identify who is consistently recording their reports. **(Already mentioned in my previous request and this is still pending – please check and update it)** with the chart displaying the status of the Visit Plan, Visit Report, and GPS data as recorded in the system, using color indicators as follows: Red – Not Recorded, Yellow – Partially Recorded, and Green – Fully Recorded. Like each day details with a scrolling option to see the entire month details.

2. The report should display any location mismatches that have been flagged by the admin in the system, along with the corresponding visit details and dates. **(Already mentioned in my previous request and this is still pending – please check and update it)**