

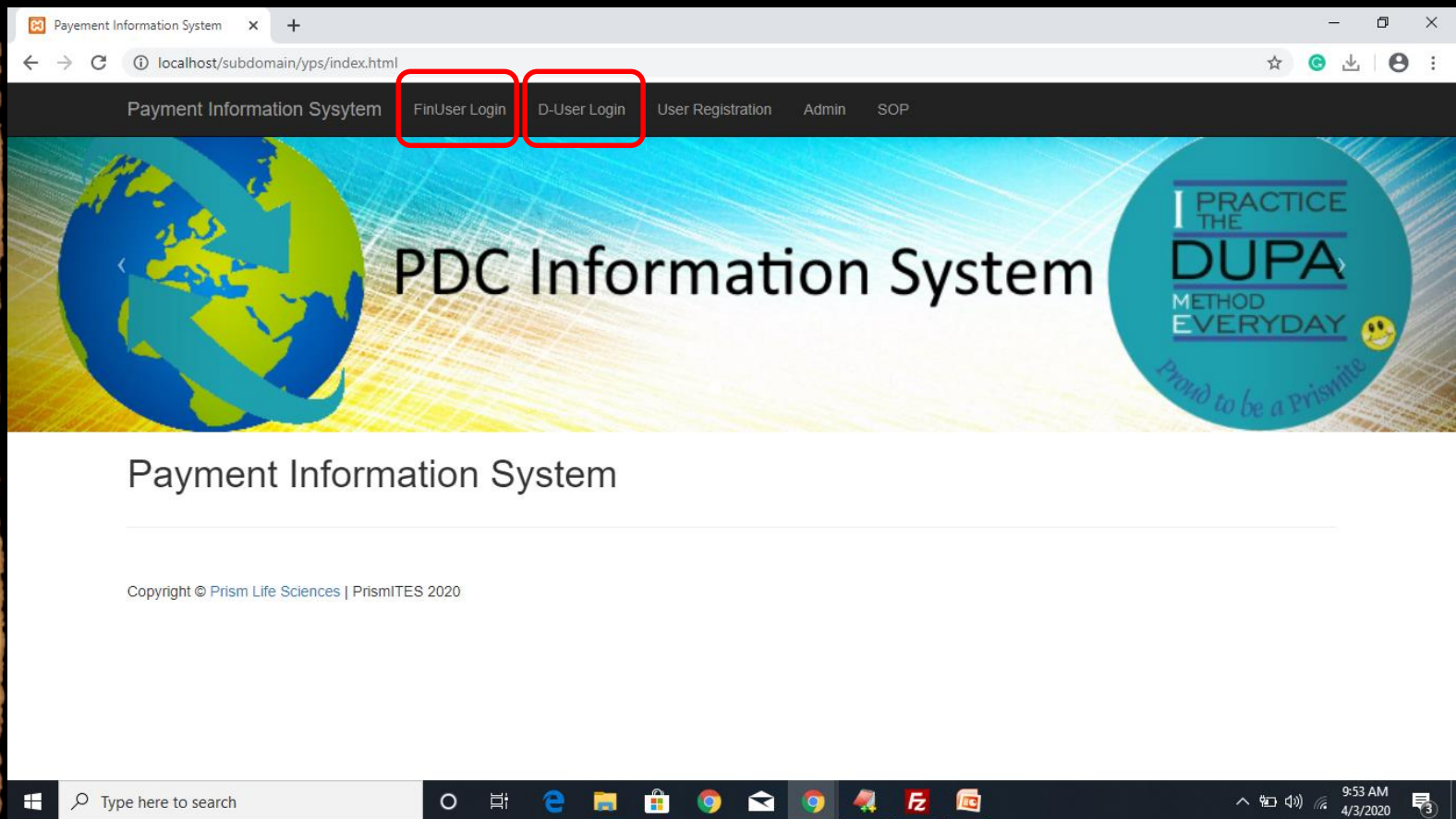
PDC Management System – Training Manual

(PrismITES)

Prism I.T. Enabled Services

This is the Home Screen for PDC Management ...

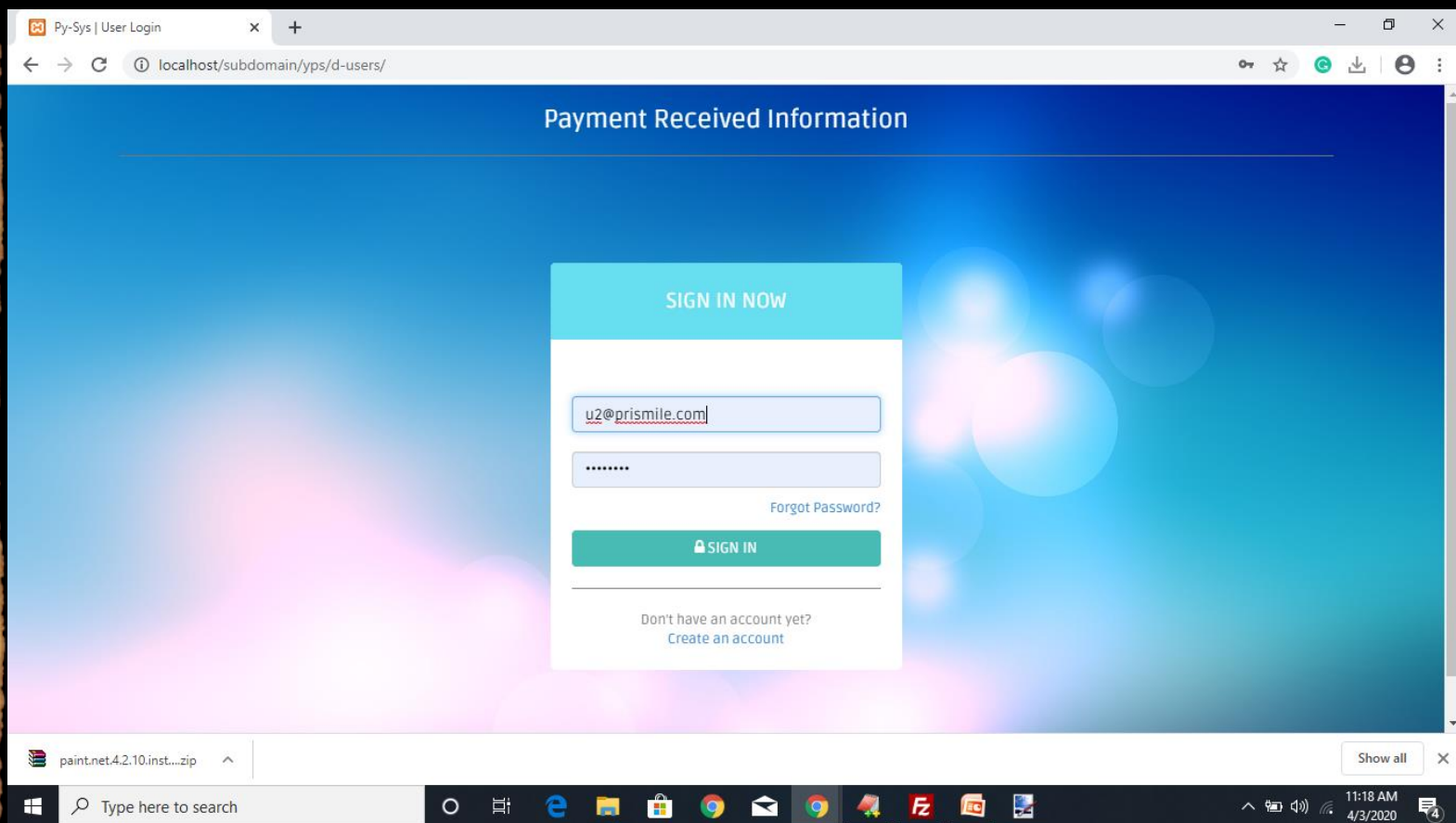
- 1st go to the given URL.
- There are 2 different user logins :
 1. Dispatch Users
 2. Finance Users
- Post login the user will get his/her respective modules to work on.
- The credentials are your official e-mail ids, Password is pass. You will change it once you login.
- This is an online system – you can work from anywhere anytime.



The screenshot shows a web browser window with the title "Payment Information System". The address bar shows the URL "localhost/subdomain/yps/index.html". The page has a dark navigation bar with the following links: "Payment Information Sysstem", "FinUser Login", "D-User Login", "User Registration", "Admin", and "SOP". The "FinUser Login" and "D-User Login" links are highlighted with red boxes. Below the navigation bar is a large banner with a globe on the left, the text "PDC Information System" in the center, and a circular logo on the right that says "I PRACTICE THE DUPA METHOD EVERYDAY" and "Proud to be a Prismite". Below the banner, the text "Payment Information System" is displayed. At the bottom of the page, there is a copyright notice: "Copyright © Prism Life Sciences | PrismITES 2020". The Windows taskbar is visible at the bottom of the screen, showing the search bar and various application icons.

Your sign in screen

- Use your credential to sign in ...
- In case your credential is not given you can use forgot and get the instruction on your official email id which is your login id too.
- Alternatively you are still stuck then contact web.support@prismile.com /Sania.
- The application records all login errors and status for processing purpose



Work for Dispatch is to :-

- Enter the details of the Distri's PDC received in the office immediately from time to time.
- Add the Distributor in the master as and when needed.
- Distributor is always connected to a Field Staff, hence Field Staff Master must be completed 1st.
- You have 2 reports to see (a) Unclosed PDCs and (b) your PDC Register ..

The screenshot shows a web browser window displaying the 'PDC MANAGEMENT SYSTEM (DISPATCH)' dashboard. The browser's address bar shows 'localhost/subdomain/yps/d-users/dashboard.php'. The dashboard has a teal header with the title and a 'Logout' button in the top right corner. A left sidebar contains a user profile for 'DispatchUser 1' and a menu with options: Dashboard, Distributor Master (highlighted in blue), Field Staff, Connect Distributor, Account Setting, PDC Received, Unclosed PDCs, and PDC Register. The main content area features three report cards, each with a document icon and the number '0'. A blue footer bar displays '2020 - PrismITES [ReSounders]'. Two red annotations are present: a box labeled 'Your Work-Menu' with an arrow pointing to the sidebar, and a box labeled 'To Logout – click on the button' with an arrow pointing to the 'Logout' button.

PI-Sys | Dashboard
localhost/subdomain/yps/d-users/dashboard.php

PDC MANAGEMENT SYSTEM (DISPATCH)

DispatchUser 1

Dashboard
Distributor Master
Field Staff
Connect Distributor
Account Setting
PDC Received
Unclosed PDCs
PDC Register

0 0 0

To Logout – click on the button

Logout

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Your Work-Menu

paint.net.4.2.10.inst...zip

Type here to search

Show all

11:30 AM
4/3/2020

Manage Field Staff Entry

- Go to Distributor Master → Field Staff from your work-menu
- Enter the Name and Designation in the space provided and click Create button to create a new entry
- For Editing an existing Field Staff select edit button in front of the name from the list and change the name and designation.
- Once the Name is changed it gets applied to all the databases.
- Absolute care should be taken & assure one person one entry ONLY.

PDC MANAGEMENT SYSTEM (DISPATCH)

Field Staff (Add)





Field Staff Name:

Description/Designation:

Create

Edit Field Staff

Show: entries Search:

#	Field Staff	Description	Creation date	Last Updated	Action
1	sanish	another check again	2020-01-13 12:40:55	2020-04-03 00:33:31	 
2	atanu	Some Entry to check	2020-01-23 17:02:02	2020-04-02 20:24:46	 

Delete button is Disallowed

Edit button

Add the Distributor under the Field Staff

- Go to Distributor Master → Connect Distributor from your work-menu
- Select the Field Staff, Enter the Dist Name & Credit Period in the space provided and click Create button to create a new entry
- For Editing an existing Distributor select edit button in front of the name from the list and change the name.
- Once the Name is changed it is available for all future entries.
- Absolute care should be taken to attach the distributor to the right Field Staff this.

The screenshot shows the 'PDC MANAGEMENT SYSTEM (DISPATCH)' interface. The left sidebar contains a menu with 'Distributor Master' highlighted. The main content area has a form titled 'Create a Distributor for Existing SF' with fields for 'Field Staff' (a dropdown), 'Distributor's Name', and 'Credit Period', and a 'Create' button. Below the form is a table titled 'Existing Distributor's List' with columns: #, Category, Description, Cr Days, Creation date, Last Updated, and Action. The table contains one entry with #1, Category 'sanish', Description 'distributor 5 of sanish', Cr Days '90', Creation date '02-04-2020 (23:16:19)', and Last Updated '2020-04-03 00:33:07'. The 'Action' column for this entry shows an edit icon and a delete icon. A red box labeled 'Edit button' points to the edit icon. Another red box labeled 'Delete button is Disallowed' points to the delete icon. The browser address bar shows 'localhost/subdomain/yps/d-users/distributor.php'.

#	Category	Description	Cr Days	Creation date	Last Updated	Action
1	sanish	distributor 5 of sanish	90	02-04-2020 (23:16:19)	2020-04-03 00:33:07	

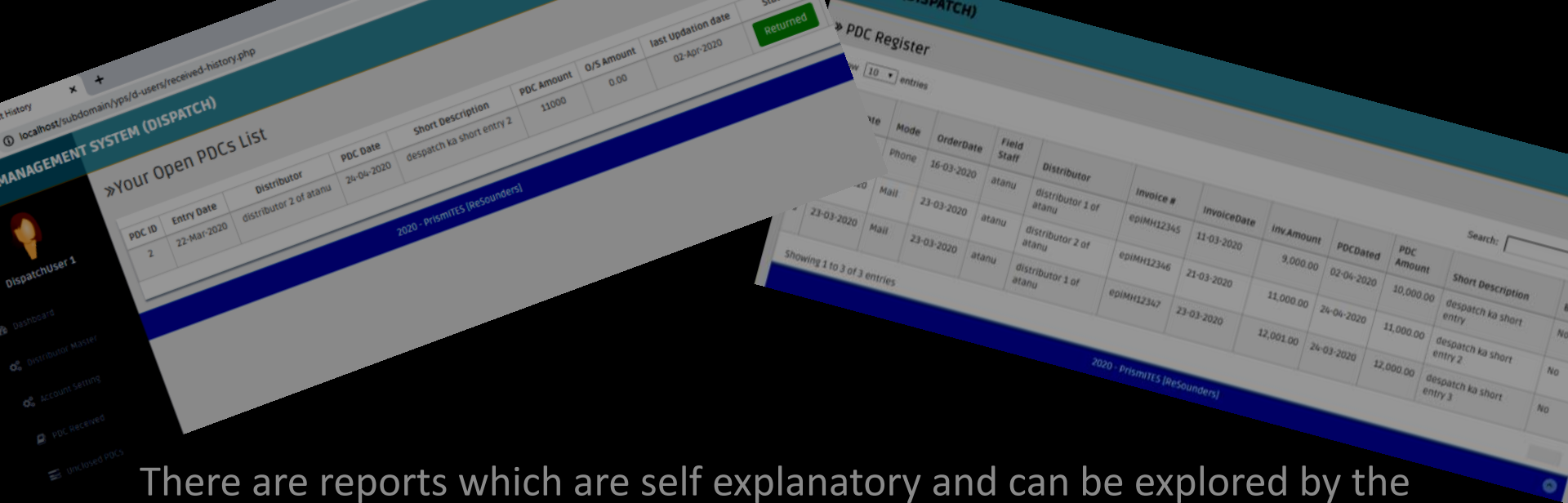
This is the main task, go to "PDC Received" to get this D/Entry screen...

- Fill all the field as shown/asked.
- Selecting the field staff makes his/her distributors in the Attached Distributor field to choose the Distributor.
- Enter a short description – this can be used later in search.
- Enter the invoice details.
- You can attach a file which is needed to store for this entry.

The screenshot shows a web browser window with the URL `localhost/subdomain/yps/d-users/payment_received.php`. The page title is "PI-Sys | User PDC Register". The main heading is "PDC MANAGEMENT SYSTEM (DISPATCH)". A sidebar on the left lists navigation options: Dashboard, Distributor Master, Account Setting, PDC Received (highlighted with a red box), Unclosed PDCs, and PDC Register. The main form area is titled "Initiate The PDC Entry as per Process" and contains the following fields:

- Date of Entry:** Text input field with placeholder "mm/dd/yyyy".
- Order Mode & Date:** Radio buttons for "On Phone" and "Over Mail", followed by a text input field with placeholder "mm/dd/yyyy".
- Field Staff:** Dropdown menu with "Select Field Staff".
- Attached Distributor:** Dropdown menu with "Select Distributor".
- Distributors Category (A/B/C):** Dropdown menu with "Priority Head".
- Receiving Office:** Dropdown menu with "Select Location".
- Short Description for PDC:** Text input field.
- PDC Date & Amount:** Text input field with placeholder "mm/dd/yyyy".
- PDC Amount:** Text input field.
- Drawn On (Bank Name):** Text input field.
- PDC Received Against Invoice Number, Date & Amount:** Section containing:
 - Invoice Number:** Text input field.
 - mm/dd/yyyy:** Text input field.
 - Invoice Amount:** Text input field.
- Remarks (max 2000 words):** Text area.
- Related Scan Doc (if any):** Text input field with a "Choose File" button and "No file chosen" text.

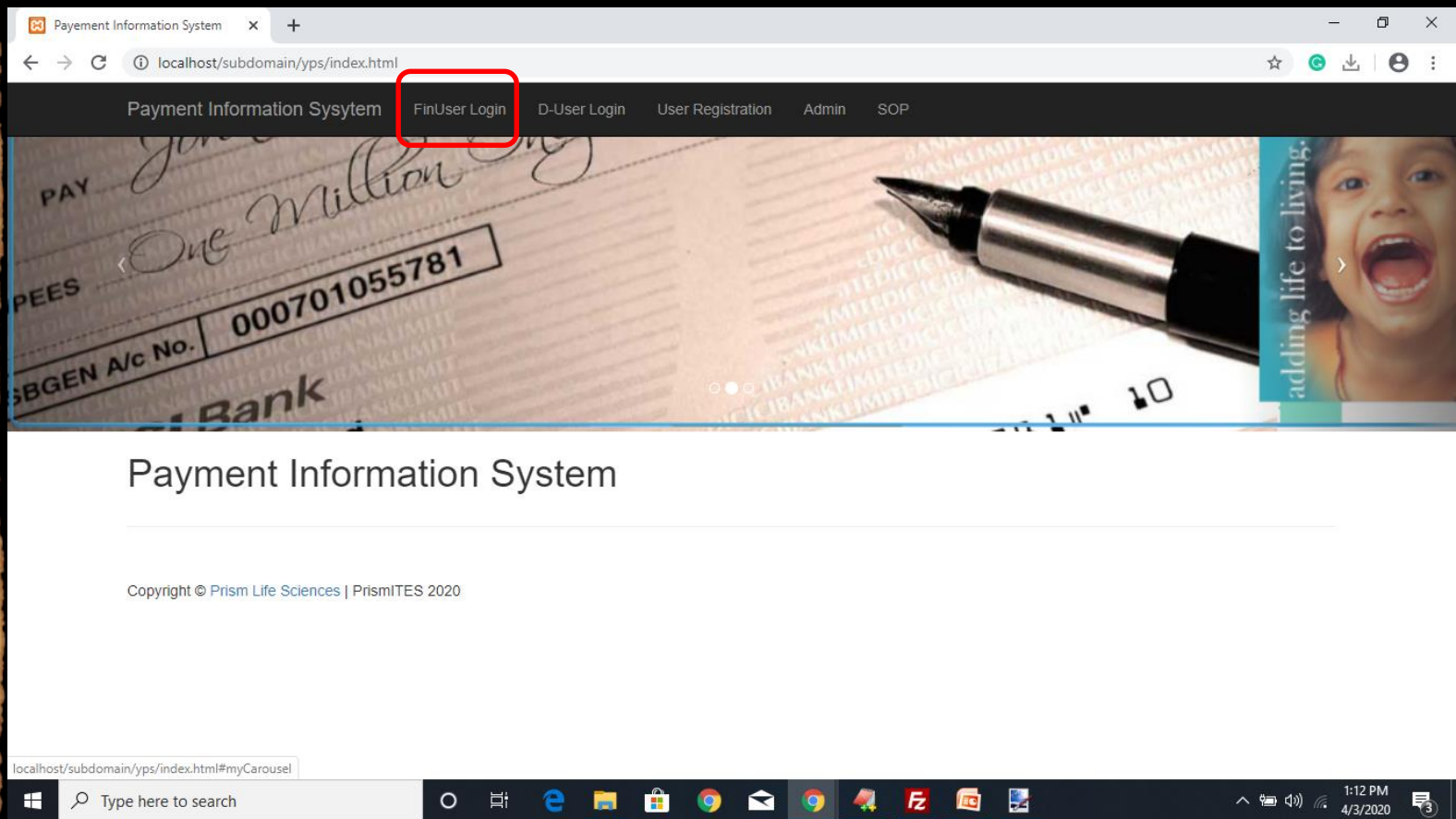
A "Submit" button is located at the bottom center of the form.



There are reports which are self explanatory and can be explored by the user by themselves ...

DISPATCH CONCLUDED ...

- For Finance user's select the Finuser Login from the home screen to get respective login.
- Do the login using your credentials as shown earlier.
- Finance user can only login into their modules likewise the Dispatch user can only login into their modules.
- Hence Select the right link from the home screen.



Work for Finance is to take the PDC and deposit tin the Bank :-

- Enter the details of the **Actions Taken** on the PDC's handed over to them in the office immediately from time to time.
- The PDC Handed over are 1st entered and then handed over, hence will be always available to record the actions taken by F&A.
- You have 2 reports to see (a) Unclosed PDCs and (b) your PDC Register ..

PI-Sys | Dashboard

localhost/subdomain/yps/f-users/dashboard.php

PDC INFORMATION SYSTEM (FINANCE)

FinanceUser 1

- Dashboard
- Account Setting
- PDCs Given By Dispatch
- Initiate Payment
- Payment History

2
2 PDC Due & Not Deposited

0

0

0

0

1

Logout

To Logout – click on the button

Your Work-Menu

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- F&A as per the SOP are not maintaining any Master Entry at this point in this app.
- The only task is to record the action taken against each PDC from time to time.
- To do so, go to PDC Given by Dispatch → PDC Received.
- You will get all the PDC Listed and sorted based on the PDC Date in Descending order for your comfort.
- **Action Button** will take you to next step.

The screenshot displays the PRISM PDC Information System (Finance) interface. The left sidebar shows the user 'FinanceUser 1' and navigation options: Dashboard, Account Setting, PDCs Given By Dispatch (highlighted), PDC Received (highlighted with a red box), PDC Not Deposited, Initiate Payment, and Payment History. The main area shows '»Your Payment History' with a table of payment history entries. The table has columns: PDC ID, Entry Date, Entred By, Distributor, PDC Date, PDC Amount, Against Invoice ?no?dt, last Updation date, Status, and Action. The table contains four entries. The 'Action' column for each entry has a 'Take Action' button. A red arrow points from a box labeled 'Take Action Button' to the 'Take Action' button for the entry with PDC ID 2.

PDC ID	Entry Date	Entred By	Distributor	PDC Date	PDC Amount	Against Invoice ?no?dt	last Updation date	Status	Action
3	23-03-2020	DispatchUser 1	distributor 1 of atanu	24-03-2020	12,000	despatch ka short entry 3	02-Apr-2020	cleared	Take Action
1	01-01-1970	DispatchUser 1	distributor 1 of atanu	02-04-2020	10,000	despatch ka short entry	02-Apr-2020	deposited	Take Action
2	22-03-2020	DispatchUser 1	distributor 2 of atanu	24-04-2020	11,000	despatch ka short entry 2	02-Apr-2020	returned	Take Action
4	02-04-2020	DispatchUser 1	distributor 4 of atanu	30-04-2020	10,000	despatches entry	Not Process yet		Take Action

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Take Action Button

Step 1 - When PDC Deposited

- The system selects Entry Screen based on the needed Action automatically as per the SOP.
- No Steps can be jumped or tried to skip.
- Once an entry form submitted cannot be Reversed/Edited.
- **Date of Entry** is the date you are doing the entry.
- The grey box are for information/entered
- Distributor is to be selected as per your choice, in case it's not found – contact Dispatch.
- O/S as per our Books

PI-Sys | User PDC Register

localhost/subdomain/yps/f-users/received-details.php?cid=4

PDC INFORMATION SYSTEM (FINANCE) Logout

> The PDC Accounting as per Process

FinanceUser 1

Dashboard

Account Setting

PDCs Given By Dispatch

Initiate Payment

Payment History

Date of Entry (Dep) Payment ID :

Payment Initiated by : Entered By :

PDC Date & Amount Drawn On (Bank Name)

Field Staff Attached Distributor

O/S Amount :

PDC Deposit Date

Remarks (max 2000 words)

Type here to search

1:35 PM 4/3/2020

Step 2 - When PDC is Cleared/Returned

- After the Deposit, You will need to capture the date on which it got cleared or bounced.
- Once you submitted the deposit entry, the status on the list has changed to [deposited].
- At all the steps the Remark has to be captured, explaining or providing needed information.
- If the PDC is cleared then that's the end of it, else the transaction is not completed and will lead to the next screen.

The screenshot displays the PRISM PDC Information System (Finance) interface. The browser address bar shows the URL: localhost/subdomain/yps/f-users/received-details.php?cid=1. The page title is "PDC INFORMATION SYSTEM (FINANCE)". The user is logged in as "FinanceUser 1". The sidebar menu includes: Dashboard, Account Setting, PDCs Given By Dispatch, Initiate Payment, and Payment History. The main content area is titled "> The PDC Accounting as per Process". The form contains the following fields:

Date of Entry (CnR)	<input type="text" value="mm/dd/yyyy"/>	Payment ID :	<input type="text" value="1"/>	
PDC Date & Amount	<input type="text" value="02-Apr-2020"/>	<input type="text" value="10,000.00"/>	Drawn On (Bank Name)	<input type="text" value="orient"/>
Payment Initiated by :	<input type="text" value="Rabale - 2nd Floor"/>	Entered By :	<input type="text" value="DispatchUser 1"/>	
PDC Deposit Date	<input type="text" value="10-Mar-2020"/>	Cheque Status	<input checked="" type="radio"/> Cleared <input type="radio"/> Returned	<input type="text" value="mm/dd/yyyy"/>
Remarks (max 2000 words)	<div><div></div></div>			
<input type="button" value="Submit"/>				

The Windows taskbar at the bottom shows the search bar with "Type here to search", several application icons, and the system clock indicating 1:48 PM on 4/3/2020.

Step 3 – When Returned PDC is Received

- Once the PDC has bounced, it will be a good practice to enter the reason as stated by the bank in the remarks.
- This is to capture the date of returned PDC received back.
- Once done then only the transaction closes else will remain open.

PI-Sys | User PDC Register localhost / 127.0.0.1 / payments +

localhost/subdomain/yps/f-users/received-details.php?cid=2

PDC INFORMATION SYSTEM (FINANCE) Logout

FinanceUser 1

- Dashboard
- Account Setting
- PDCs Given By Dispatch
- Initiate Payment
- Payment History

> The PDC Accounting as per Process

Date of Entry (CqR)	<input type="text" value="mm/dd/yyyy"/>	Payment ID :	<input type="text" value="2"/>
PDC Date & Amount	<input type="text" value="24-Apr-2020"/>	<input type="text" value="11,000.00"/>	Drawn On (Bank Name) <input type="text" value="Axis"/>
Payment Initiated by :	<input type="text" value="Rabale - 2nd Floor"/>		Entered By : <input type="text" value="DispatchUser 1"/>
PDC Deposit Date	<input type="text" value="11-Mar-2020"/>	Cheque Status :	<input type="text" value="returned"/> <input type="text" value="11-Mar-2020"/>
Remarks (max 2000 words)	<input type="text"/>		Returned Cheque Received Date <input type="text" value="mm/dd/yyyy"/>
<input type="button" value="Submit"/>			

Windows Taskbar: Type here to search 1:48 PM 4/3/2020

When the Transaction is closed ...

- When the PDC is either Cleared or Closed as in the previous step, this screen appears with all the information for the user to see as an information.
- The 1st 3 date fields are entered by you corresponding to the remarks as 1,2,...
- The PDC ID is generated by Dispatch.
- Dispatch can see all the remarks entered by you at all 3 steps.

BOSS SEES THESE ALL LIVE !!!

PI-Sys | User PDC Register localhost / 127.0.0.1 / payments +

localhost/subdomain/yps/f-users/received-details.php?cid=3

PDC INFORMATION SYSTEM (FINANCE)

Logout

FinanceUser 1

- Dashboard
- Account Setting
- PDCs Given By Dispatch
- Initiate Payment
- Payment History

> The PDC Accounting as per Process

Date of Entry (Sho)	Dep : [01-Mar-2020]	CI/Rt : [03-Mar-2020]	Not/Applicable	Payment ID : 3, [23-Mar-2020]
Payment Initiated by :	Rabale - 2nd Floor		Entered By :	DispatchUser 1
PDC Date & Amount	24-Mar-2020	12,000.00	Drawn On (Bank Name)	bank of oman
PDC Deposit Date	11-Mar-2020	Cheque Status	cleared	11-Mar-2020
Remarks (max 2000 words)	1) deposited : cheque deposited by mr x 2) cleared : bbbbank informed of the clearance			Returned Cheque Received Date Not/Applicable

Go Back >>

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Type here to search

1:49 PM 4/3/2020