MR Manage Product Brochure

Version: 1.0

Confidentiality Statement

This document contains confidential product information relating to MR Manage. It is intended for client demonstrations, product evaluation, onboarding and business discussions.

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Introduction

MR Manage is a Medical Representative management platform that digitizes doctor management, clinic management, yearly planning, visit execution, leave, expense and reporting for a pharmaceutical company. It enables pharmaceutical organizations to manage field operations through a centralized application.

Product Highlights

- Role-based access for Executive, Manager and Medical Representative
- Doctor and Clinic approval workflows
- Yearly Plan with automatic Monthly Plan generation
- Quick Visit management
- Visit Statistics and reporting
- Expense Summary and TA calculation
- Chemist and Distributor management
- Inventory management

User Roles

Role	**Responsibilities**	**Access**
Executive	Organization administration and approvals	Organization-wide
Manager	Team management and approvals	Assigned team
Medical Representative	Data Creation and Daily field activities	Own records

Product Workflow

Medicines & Area Management → Doctor & Clinic Management →Visit Plans and Execution → Chemist & Distributor Management → Leave Management → Expense & Reports →Stock management

1. Medicine Management

i. Overview

The Medicine Management module maintains the organization-wide medicine master used during planning and visit execution. Executives and Managers maintain medicines while Medical Representatives select approved medicines during Yearly Plans and Quick Visits. Medicines may also include product images for easier identification.

ii. Key Features

- Create and edit medicines
- Search medicines by name
- Upload or replace medicine image
- View medicine details
- Organization-wide medicine catalogue
- Role-based access
- Used in Yearly Plans and Quick Visits

iii. Role-wise Accessibilities

Feature	**Executive**	**Manager**	**MR**
Create	Yes	Yes	No
Edit	Yes	Yes	No
View	Yes	Yes	Yes
Upload Image	Yes	Yes	No
Use in Planning	Yes	Yes	Yes

iv. Visibility

Medicine records are organization-wide.

Executive: All medicines in the organization
Manager: All medicines in the organization
Medical Representative: Read-only access for selection during Yearly Plans and Quick Visits.

v. Medicine Maintenance

Executives and Managers can create and maintain medicine records. Medicine name and product image can be updated whenever required. MRs cannot create or modify medicines.

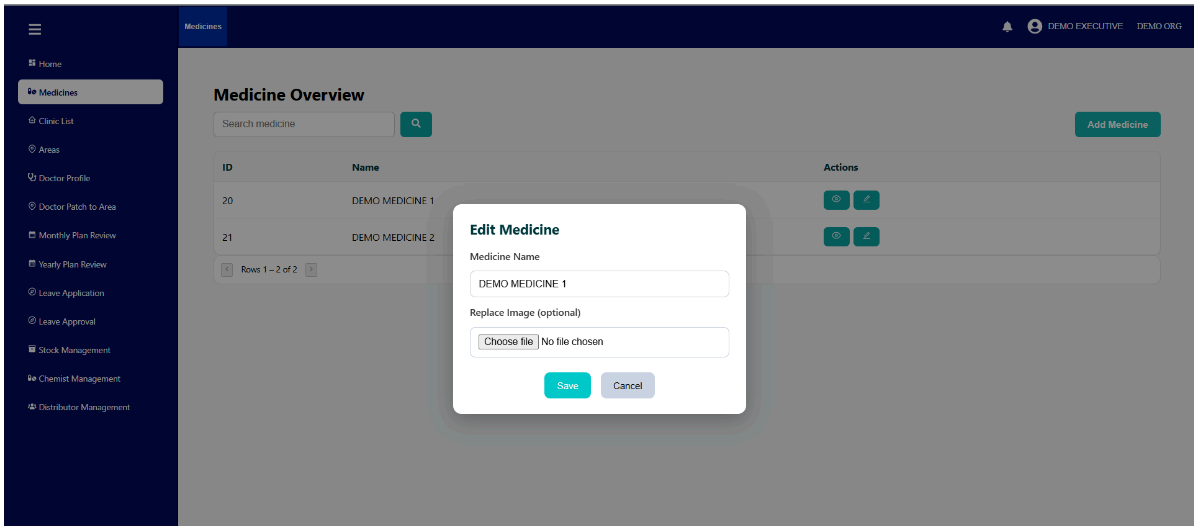

Figure 1.1 – Medicine Management

vi. Business Rules

- Medicines are organization-wide master data.
- Only Executives and Managers can maintain medicines.
- MRs cannot create, edit or delete medicines.
- MRs select medicines from the approved catalogue during Yearly Plans and Quick Visits.
- Medicine updates are immediately available throughout the organization.

vii. Workflow

Executive / Manager Creates Medicine → Save → Available in Organization Catalogue → Selected during Yearly Plans & Quick Visits

viii. Business Benefits

- Centralized medicine master
- Consistent medicine selection
- Reduced duplicate medicine entries
- Improved planning accuracy
- Organization-wide standardization

2. Area Management

i. Overview

The Area Management module maintains business territories within the organization. Areas are used for Doctor's Clinic Patch Area mapping, visit planning and Travelling Allowance (TA) calculation. Executives and Managers maintain Areas, while Area assignments define the operational territory of Managers and Medical Representatives.

ii. Key Features

- Create and edit Areas
- Search Areas by Name or Code
- Define Travelling Allowance (TA)
- Assign Areas to Managers and MRs
- View MR–Area assignments
- Role-based visibility

iii. Role-wise Accessibilities

Feature	Executive	Manager	MR
Create Area	Yes	Yes	No
Edit Area	Yes	Yes	No
Assign Area	Self, Managers & MRs	Self & Team	No
View Areas	Yes	Yes	Own
View MR Assignments	Yes	Yes	Own

iv. Visibility

Area records are displayed according to the logged-in user's organizational hierarchy.

Executive: All Areas and assignments within the organization.
Manager: Areas assigned to the manager and MRs in the team.
Medical Representative: Areas assigned to the logged-in MR.

v. Area Management

Executives and Managers create business Areas by defining an Area Name, Area Code and Travelling Allowance. These Areas become available for assignment and Doctor Patch Area mapping.

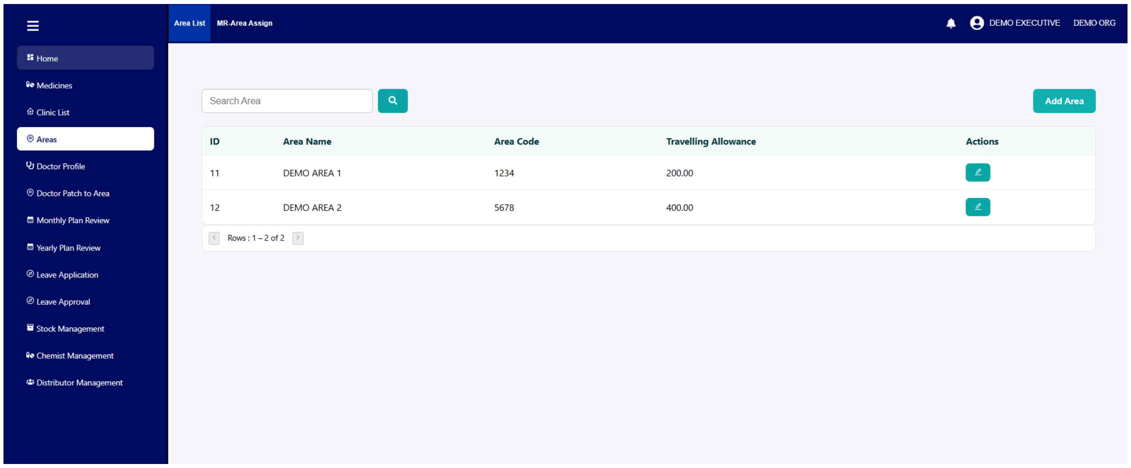

Figure 2.1 – Area List

vi. MR Area Assignment

Executives can assign Areas to themselves, Managers and MRs. Managers can assign Areas to themselves and MRs reporting to them. Multiple Areas may be assigned to the same user.

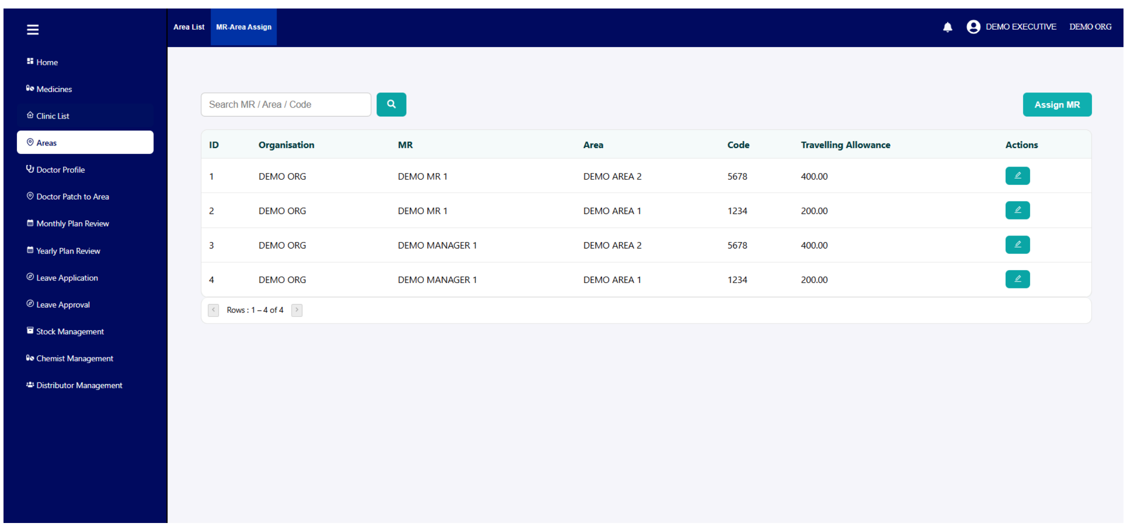

Figure 2.2 – MR Area Assignment

vii. Workflow

Create Area ⟶ Define TA Value ⟶ Save ⟶ Assign Area to Manager / MR ⟶ Available for Doctor Patch Area & TA Calculation

viii. Business Benefits

- Centralized territory management
- Accurate Travelling Allowance calculation
- Efficient territory assignment
- Supports Doctor Patch Area mapping
- Improves operational planning and reporting

3. Doctor Management

i. Overview

The Doctor Management module provides a centralized repository for maintaining doctor information, assigning ownership, approving records and viewing complete doctor profiles and medication history.

ii. Key Features

- Create and edit doctor records
- Search by Doctor Name, Registration Number or Status
- Role-based approval workflow
- Automatic or manual MR assignment
- Registration Number auto-fill
- Doctor Profile
- Medication History
- Role-based visibility

iii. Role-wise Accessibilities

Feature	Executive	Manager	MR
Create	Yes	Yes	Yes
Edit	Yes	Yes	Yes
Approve	Yes	Yes	No
Reject	Yes	No	No
Assign MR	Manual	Manual	Auto
View Profile	Yes	Yes	Yes
Medication History	Yes	Yes	Yes

iv. Visibility

Doctor records are displayed according to the logged-in user's organizational hierarchy.

Role	Visible Records
Executive	All doctors within the organization
Manager	Doctors assigned to the manager and MRs reporting to the manager
Medical Representative	Only doctors assigned to the logged-in MR

v. Doctor Registration

Executives and Managers can assign a doctor to any available MR. Doctors created by an MR are automatically assigned to the logged-in MR.

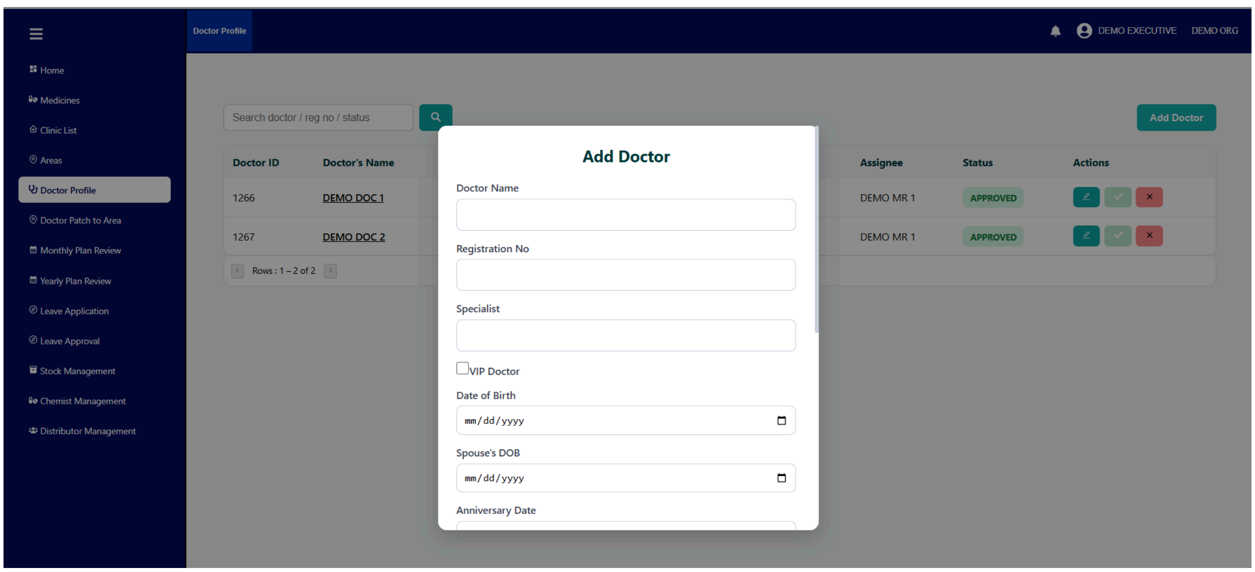

Figure 3.1 – Add Doctor Screen

vi. Intelligent Auto-Fill

Entering an existing Registration Number automatically populates available doctor details.

- Saves time
- Reduces manual entry
- Improves consistency
- Avoids repetitive data entry

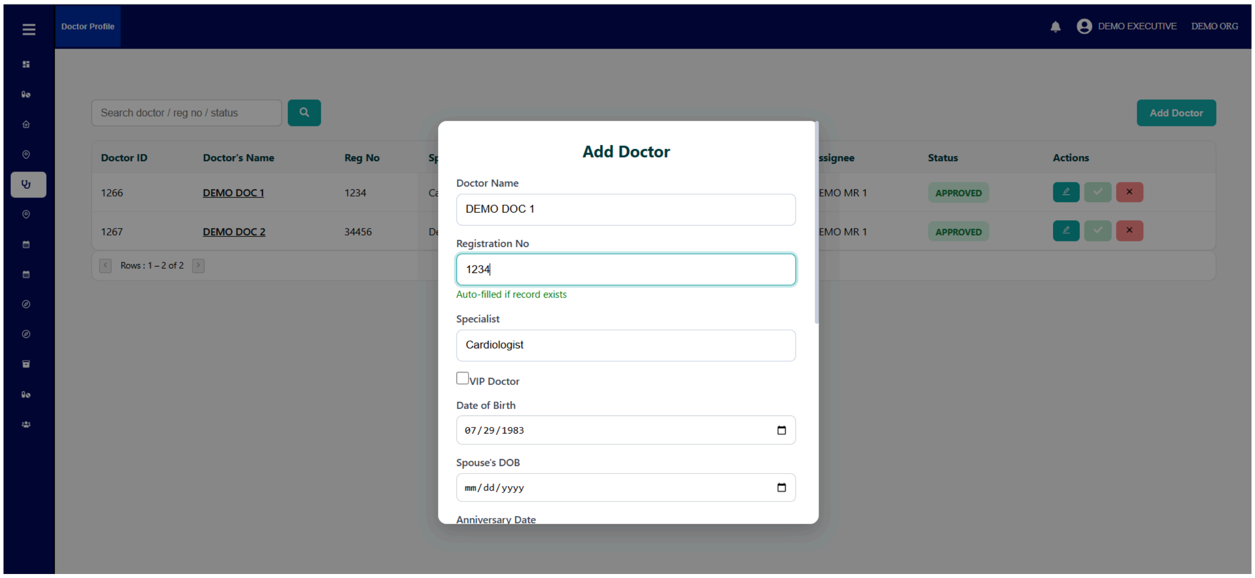

Figure 3.2 – Registration Number Auto-Fill

vii. Doctor-to-MR Relationship

Each doctor is mapped to only one Medical Representative at a time.

- Executive/Manager manually selects the MR.
- MR-created doctors are auto-assigned.
- One-to-one mapping improves accountability and reporting.

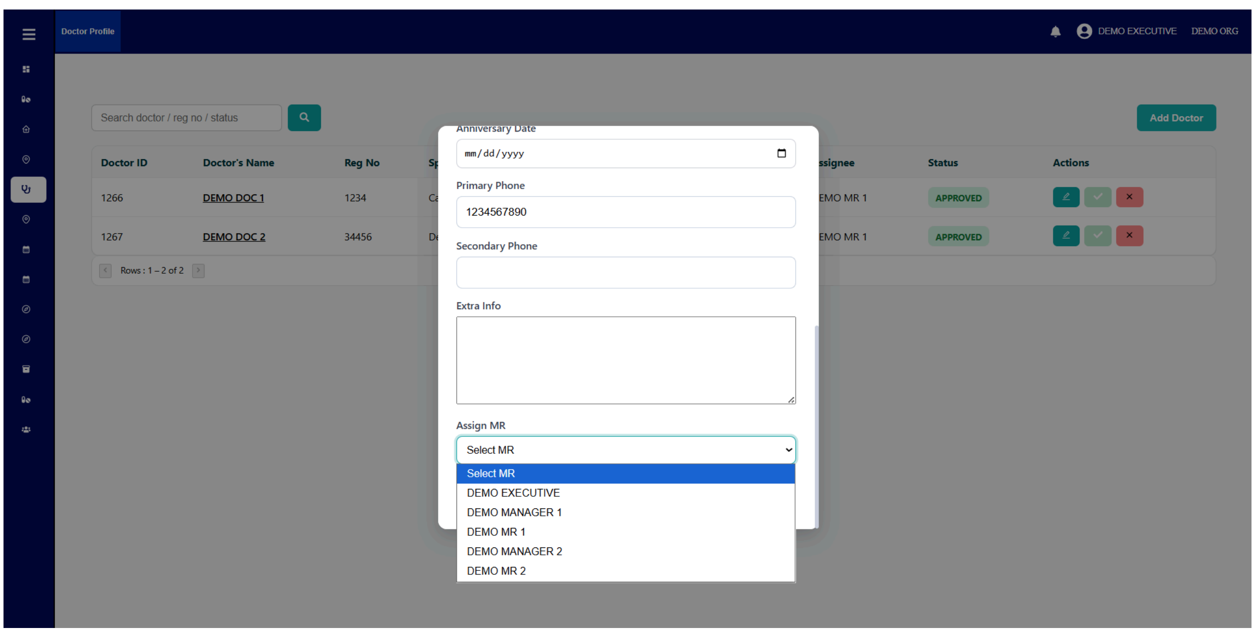

Figure 3.3 – Assign MR

viii. Duplicate Doctor Handling

Duplicate names do not affect operations. Registration Number is used to identify existing records and trigger intelligent auto-fill where applicable.

ix. Doctor Profile

Provides registration details, specialist, contact information, important dates, operational status and additional information.

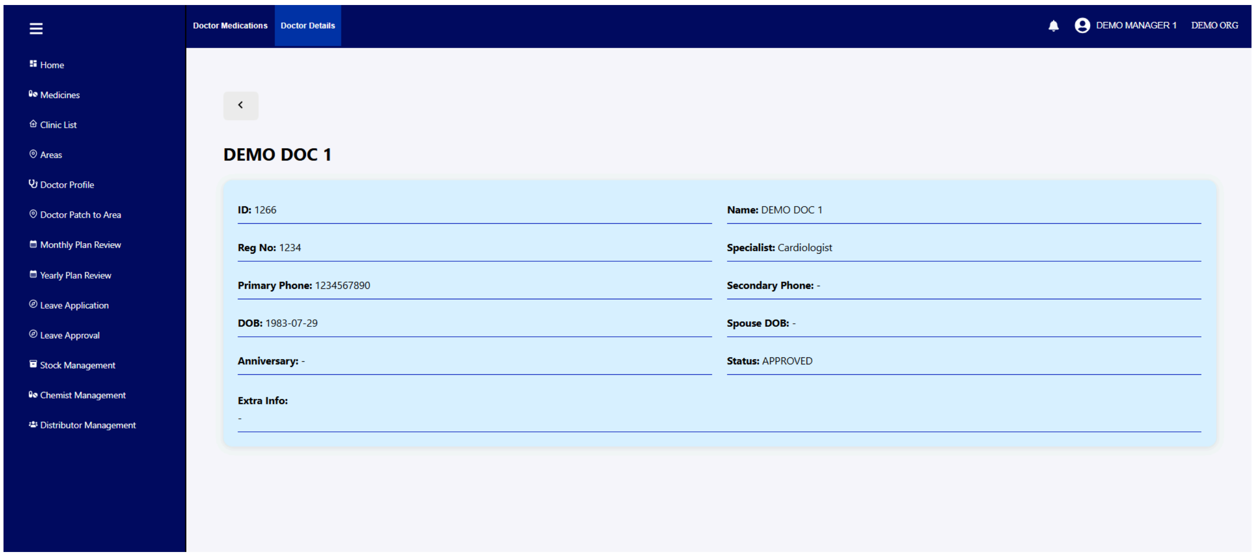

Figure 3.4 – Doctor Details

x. Medication History

Displays previous visit dates and medicines associated with the doctor.

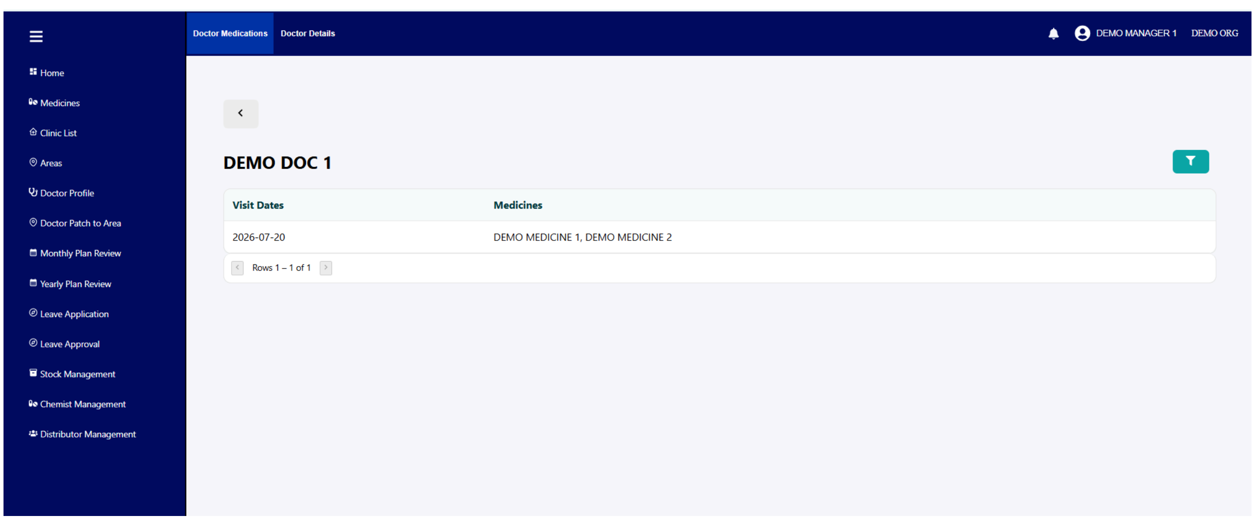

Figure 3.5 – Medication History

xi. Workflow

Create Doctor → Assign MR / Auto Assign → Submit → Approval → Available for Clinics, Planning and Visit Execution

xii. Business Benefits

- Centralized doctor repository
- Role-based visibility and security
- Reduced data entry through auto-fill
- One-to-one ownership
- Accurate planning and reporting
- Complete historical doctor information

4. Clinic Management

i. Overview

The Clinic Management module maintains approved clinic locations associated with approved doctors. It supports clinic creation, location capture, approval workflow, assignee management and role-based visibility before clinics become operational for planning and visit execution.

ii. Key Features

- Create and edit clinic records
- Search clinics by Doctor, Clinic Name, Address or Status
- Select approved doctor while creating a clinic
- Automatic MR assignment from selected doctor
- Capture clinic address and GPS location by using Current Location, address search or map pin
- Role-based approval workflow
- Role-based visibility

iii. Role-wise Accessibilities

Feature	**Executive**	**Manager**	**MR**	**Remarks**
Create	Yes	Yes	Yes	MR auto-assigned
Edit	Yes	Yes	Yes	Based on access
Approve	Yes	Yes	No	
Reject	Yes	Yes	No	
Assign MR	No	No	No	Auto-assigned from selected doctor
Capture Location	Yes	Yes	Yes	Google Maps

iv. Visibility

Executive: All clinics in the organization
Manager: Clinics assigned to manager/team
Medical Representative: Clinics assigned to the logged-in MR.

v. Clinic Registration

A clinic can be created only against an approved doctor. When a doctor is selected, the assigned MR is inherited automatically. Users can enter the clinic address and capture GPS coordinates using current location, address search or map pin.

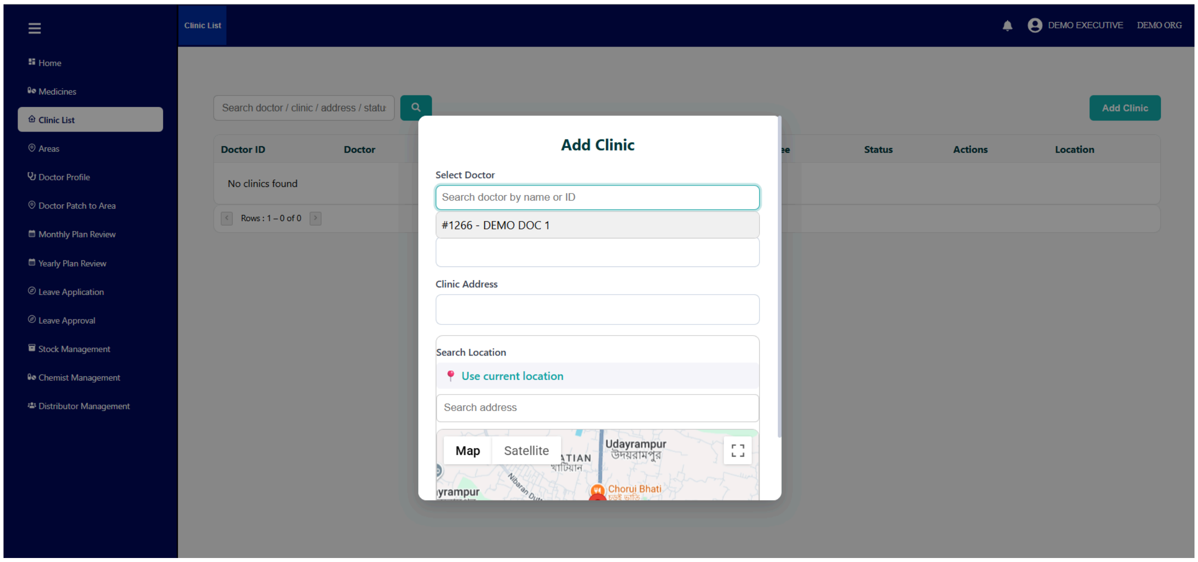

Figure 4.1 – Add Clinic Screen

vi. Clinic List & Approval

The Clinic List displays all accessible clinics with doctor details, assignee, status, location and available actions. Executives and Managers can approve or reject submitted clinics. Approved clinics become available for planning and visit execution.

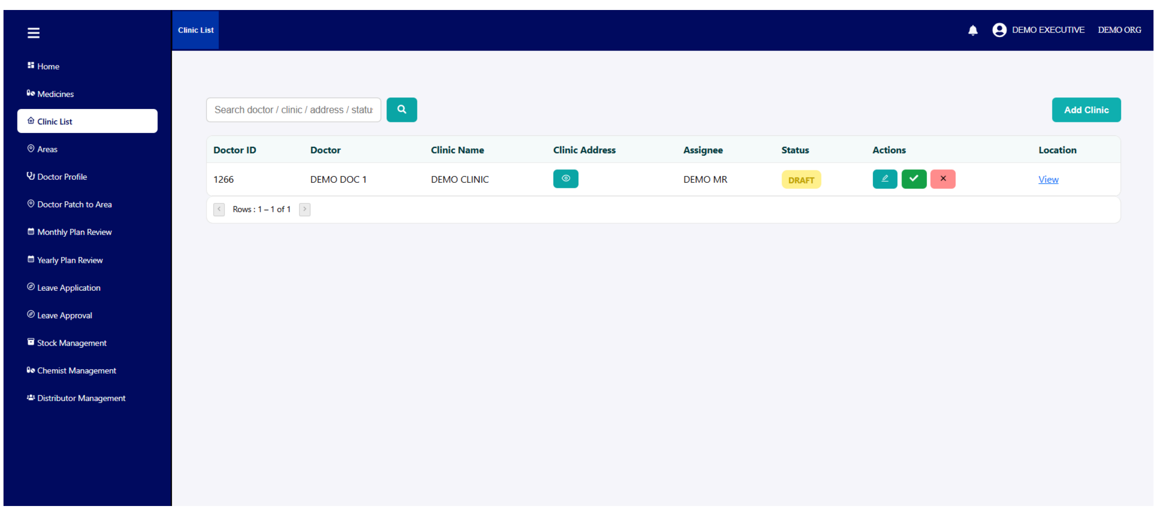

Figure 4.2 – Clinic List

vii. View Clinic Location

Displays chemist location on Google Maps.

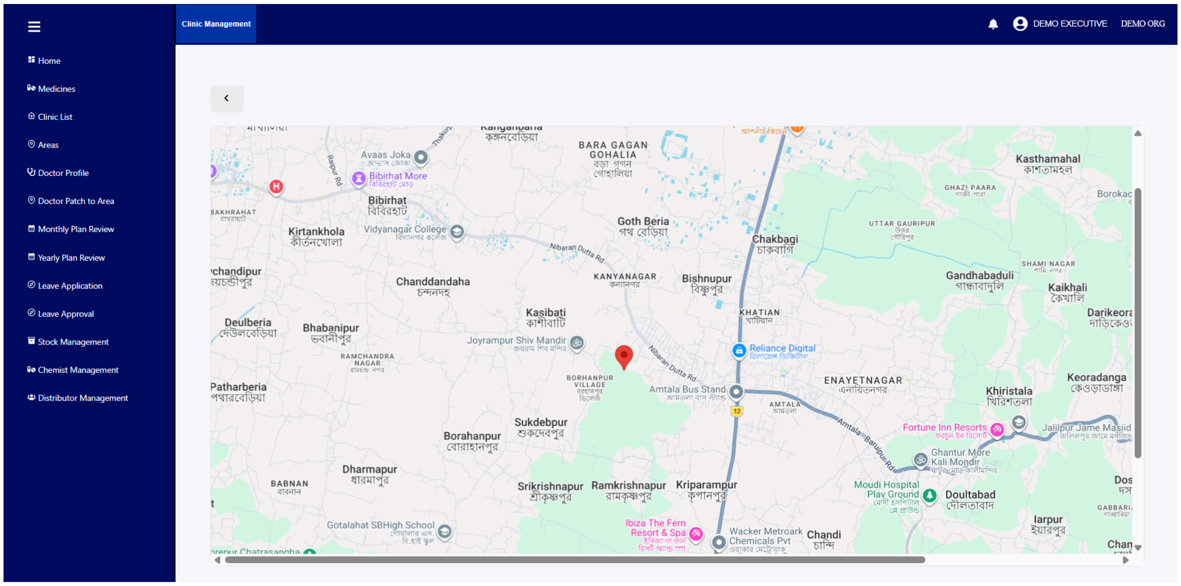

Figure 4.3 – View Clinic Location

viii. Workflow

Approved Doctor → Create Clinic → Auto Assign MR → Submit → Executive/Manager Approval → Doctor - Clinic Patch Record Auto-Created → Available for Planning & Visit Execution

ix. Business Benefits

- Centralized clinic repository
- Accurate GPS-based clinic location
- Automatic MR assignment
- Approval-based operational control
- Foundation for Doctor Patch Area and TA calculation
- Improved planning and reporting accuracy

5. Doctor - Clinic Area Patch Management

i. Overview

The Doctor - Clinic Area Patch module links every Doctor–Clinic combination with an organizational Area. This mapping is used during visit execution to calculate Travelling Allowance (TA), generate accurate Expense Summaries and define operational territories.

ii. Key Features

- Automatically generates a Doctor's Clinic Patch record when a Clinic is created
- Assign organizational Areas to Doctor–Clinic combinations
- Independent approval workflow
- Search by Doctor, Clinic, Area or Status
- Role-based visibility
- Supports TA calculation and Expense Summary

iii. Role-wise Accessibilities

Feature	Executive	Manager	MR
Patch Area	Yes	Yes	Yes
Approve Patch	Yes	Yes	No
Reject Patch	Yes	No	No
View Patch	Yes	Yes	Yes
TA Usage	Yes	Yes	Yes

iv. Visibility

Patch records are displayed according to the logged-in user's organizational hierarchy.

Executive: All Patch records within the organization.
Manager: Patch records belonging to the manager and reporting MRs.
Medical Representative: Patch records assigned to the logged-in MR.

v. Doctor - Clinic Patch Area Assignment

Whenever a Clinic is created, the system automatically creates a corresponding Doctor - Clinic Patch Area record. Executives, Managers or the assigned MR select an organizational Area and submit the record for approval.

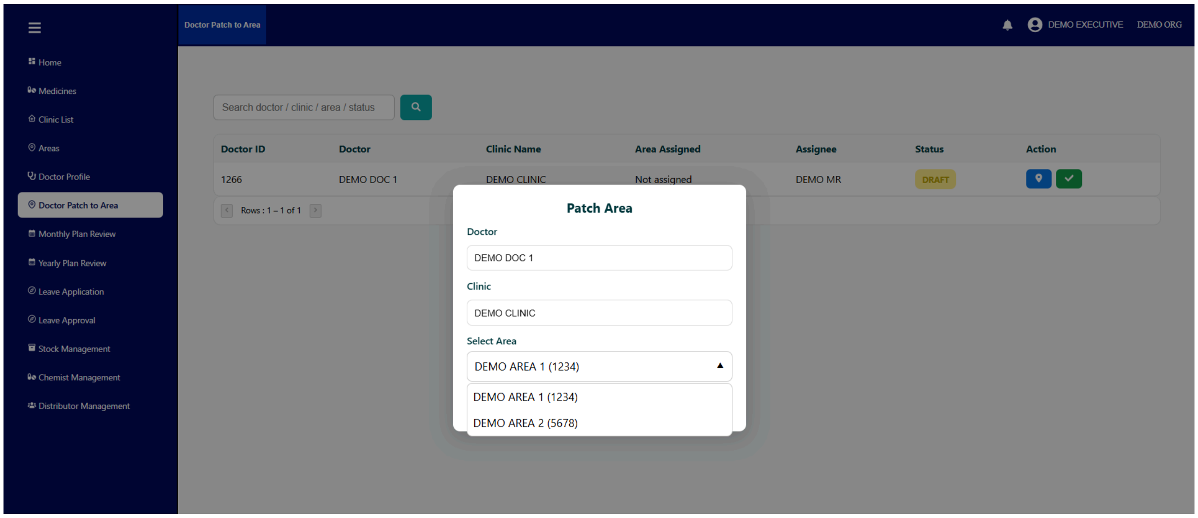

Figure 5.1 – Patch Area Assignment

vi. Approval Workflow

After Area selection, the patch record follows an independent approval process. Only approved patch records become operational and are considered during visit execution and TA calculation.

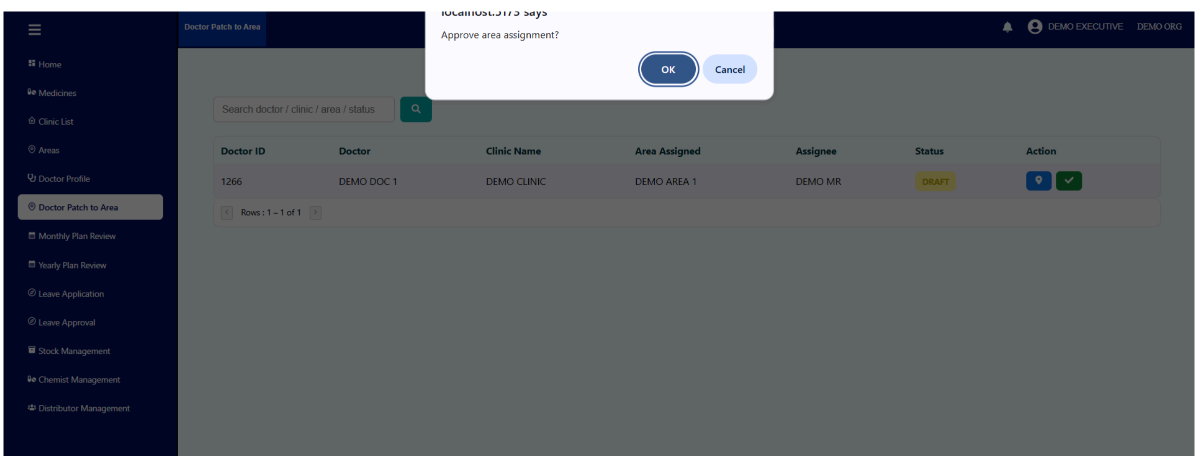

Figure 5.2 – Patch Area Approval

vii. TA Calculation Logic

For a given MR and business day, each approved Area contributes its Travelling Allowance only once, regardless of the number of Clinics visited within that Area. Visiting Clinics in different Areas results in one TA entry per Area.

viii. Workflow

Clinic Created ⟶ Doctor - Clinic Patch Record Auto-generated ⟶ Select Area ⟶ Submit ⟶ Approval ⟶ Available for Visit Execution & TA Calculation

ix. Business Rules

- Doctor Patch records are automatically generated when a Clinic is created.

- A Patch must be approved before becoming operational.
- Only approved Patch records participate in TA calculation and Expense Summary.
- Multiple visits within the same Area on the same day generate only one TA entry per MR.

x. Business Benefits

- Automatic territory mapping
- Accurate TA calculation
- Reliable Expense Summary generation
- Independent approval workflow
- Improved operational planning and reporting

6. Yearly Plan Management

i. Overview

The Yearly Plan module enables Executives, Managers and Medical Representatives to create, review and approve annual visit schedules for approved Doctors and Clinics. Approved Yearly Plans automatically generate Monthly Plans, ensuring consistent operational planning.

ii. Key Features

- Create Yearly Plans for approved Doctors and Clinics
- Bulk visit generation using date range and selected weekdays
- Assign MR during planning
- Tag medicines/PPTs from organization catalogue
- Role-based approval workflow
- Search, filter and bulk selection
- Approve All and Delete All operations
- Automatic Monthly Plan generation after approval

iii. Role-wise Accessibilities

Feature	Executive	Manager	MR
Create	Yes	Yes	Yes
Edit	Yes	Yes	Yes
Approve	Yes	Yes	No
Reject/Delete	Yes	Yes	Own Draft
Bulk Approve	Yes	Yes	No
Bulk Delete	Yes	Yes	Own Draft
View	Organization	Team	Own

iv. Visibility

Plans are displayed according to the logged-in user's organizational hierarchy.

Executive: All plans within the organization.
Manager: Plans belonging to the manager and reporting MRs.
Medical Representative: Only own plans.

v. Yearly Plan Creation

Users select an approved Doctor and Clinic, specify the planning period, choose visit weekdays, assign the responsible MR and tag medicines/PPTs from the organization catalogue. The system generates the required visit schedule.

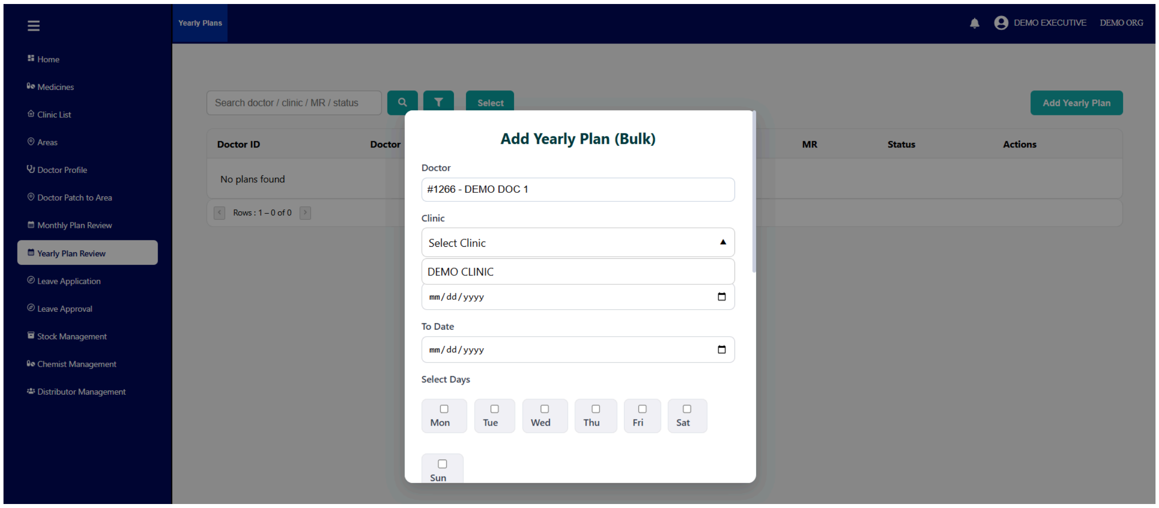

Figure 6.1 – Add Yearly Plan (1)

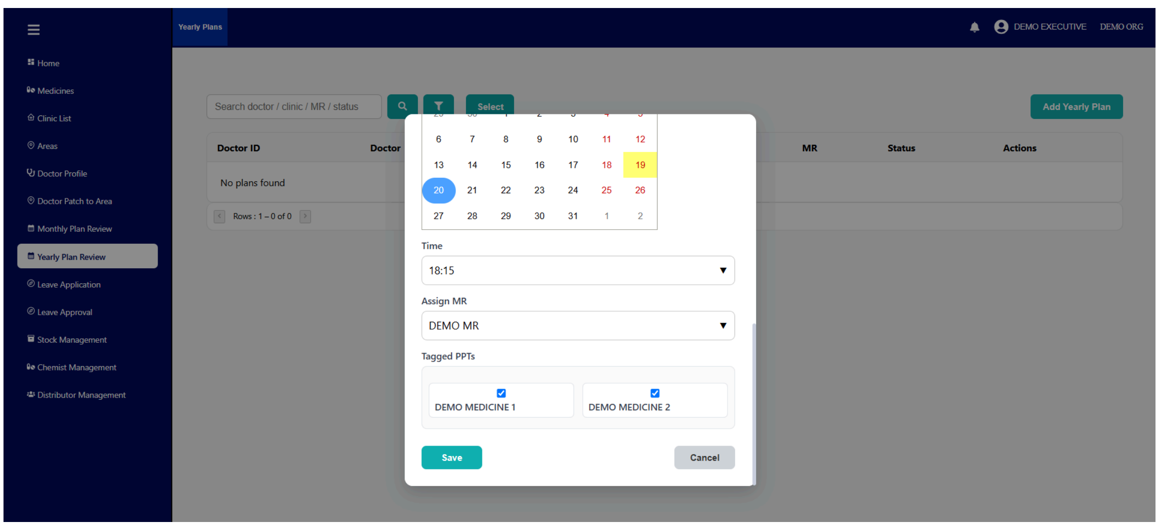

Figure 6.2 – Add Yearly Plan (2)

vi. Approval Workflow

Submitted plans require Executive or Manager approval before becoming operational. Rejected plans can be modified and resubmitted.

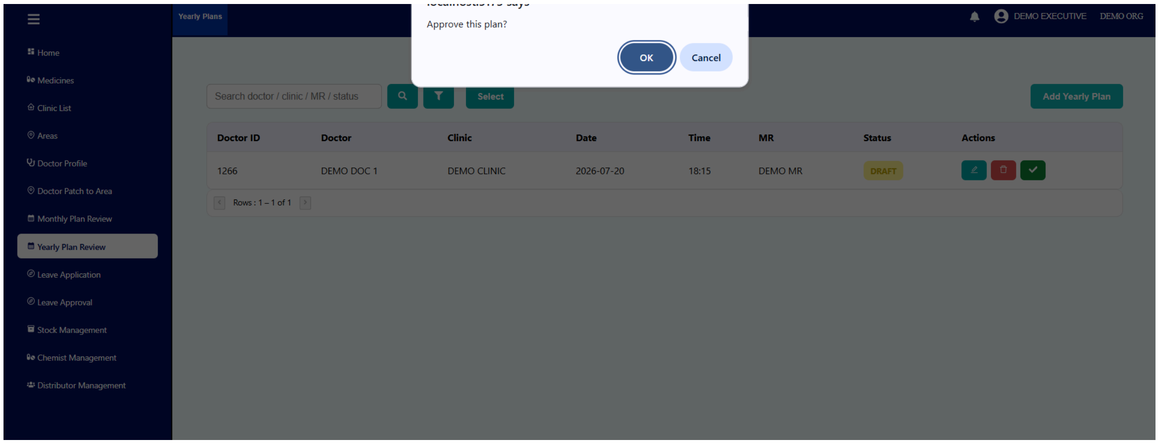

Figure 6.3 – Individual Approval

vii. Bulk Operations

Managers and Executives can select multiple draft plans simultaneously for bulk approval or bulk deletion, improving operational efficiency.

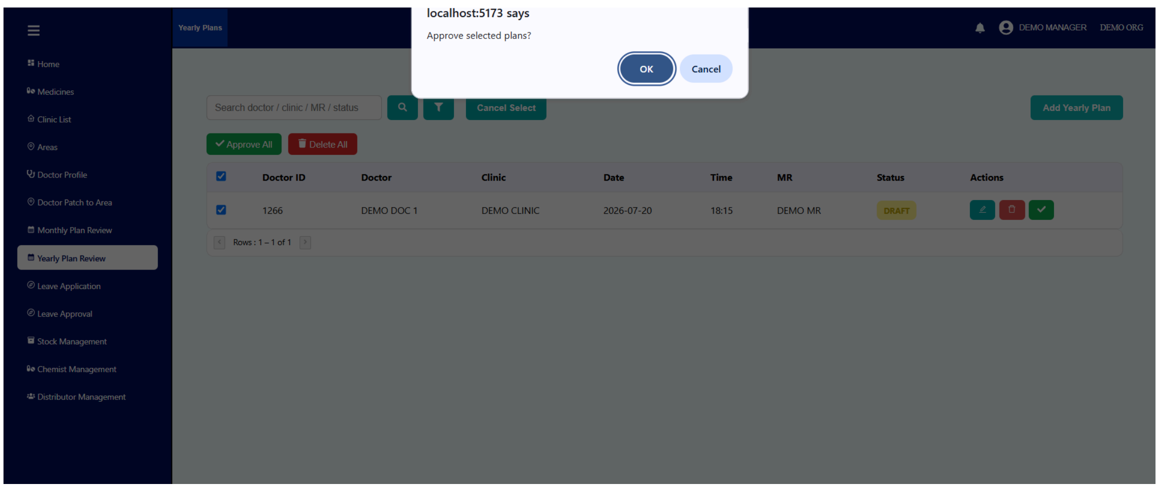

Figure 6.4 – Bulk Approve / Delete

viii. Workflow

Approved Doctor & Clinic → Create Yearly Plan → Submit → Executive/Manager Approval → Monthly Plans Automatically Generated

ix. Business Rules

- Plans can contain only approved Doctors and approved Clinics.
- Medicines/PPTs are selected from the organization catalogue.
- Rejected plans can be modified and resubmitted.
- Approved Yearly Plans automatically generate Monthly Plans.
- Monthly Plans cannot be created manually.
- Bulk approval and deletion are available to authorized users only.

x. Business Benefits

- Standardized annual visit planning
- Faster approval through bulk operations
- Automatic Monthly Plan generation
- Role-based security
- Improved planning consistency
- Better reporting and operational visibility

7. Monthly Plan Management

i. Overview

The Monthly Plan module provides the operational visit schedule generated automatically from approved Yearly Plans. It serves as the day-to-day execution plan for Medical Representatives and is synchronized with planning changes.

ii. Key Features

- Automatically generated from approved Yearly Plans
- View-only operational schedule
- Search by Doctor, Clinic, MR or Status
- Filter by Month and Year
- Displays tagged medicines/PPTs
- Role-based visibility
- Automatically synchronized with approved planning changes

iii. Role-wise Accessibilities

Feature	**Executive**	**Manager**	**MR**
View	Yes	Yes	Yes
Search / Filter	Yes	Yes	Yes
Create	Automatic	Automatic	Automatic
Edit	No	No	No
Delete	No	No	No

iv. Visibility

Monthly Plans are displayed according to the logged-in user's organizational hierarchy.

Executive: Entire organization
Manager: Own team
Medical Representative: Own plans

v. Automatic Monthly Plan Generation

Whenever a Yearly Plan is approved, the system automatically generates the corresponding Monthly Plan entries. Users cannot manually create, edit or delete Monthly Plans.

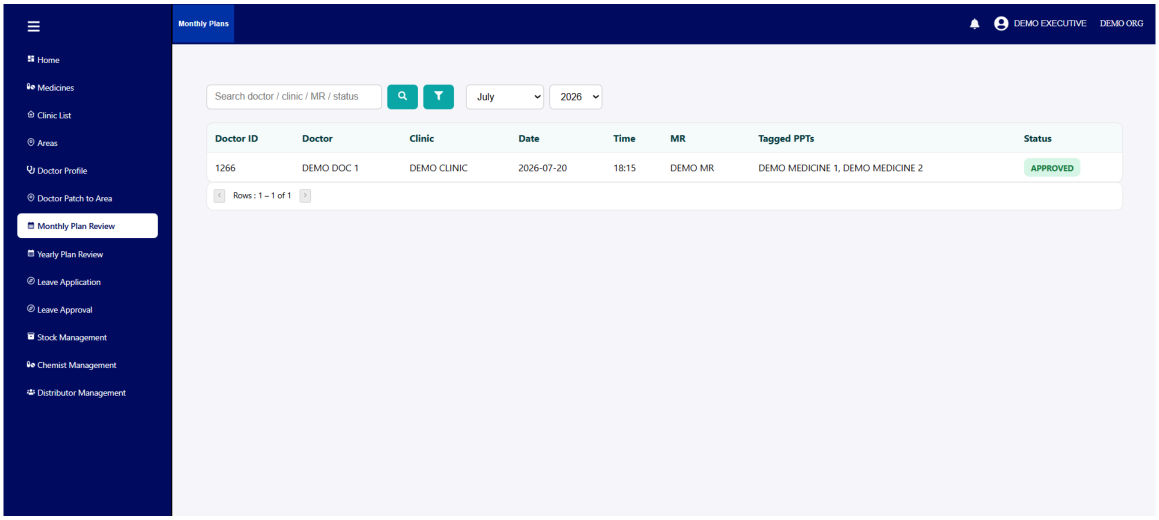

Figure 7.1 – Monthly Plan Review

vi. Monthly Plan Information

- Doctor and Clinic
- Visit Date and Time
- Assigned MR
- Tagged Medicines/PPTs
- Approval Status
- Fillters

vii. Workflow

Approved Yearly Plan → Monthly Plan Automatically Generated → Available for Review → Used During Visit Execution

viii. Business Rules

- Monthly Plans are generated only from approved Yearly Plans.
- Manual creation, editing and deletion are not permitted.
- Any approved planning change is synchronized automatically.
- Only approved Doctors and Clinics appear in Monthly Plans.

ix. Business Benefits

- Eliminates manual scheduling
- Maintains consistency between yearly and monthly planning
- Provides accurate operational schedules
- Supports efficient field execution
- Improves reporting and planning accuracy

8. Quick Visit

i. Overview

The Quick Visit module enables Executives, Managers and Medical Representatives (MRs) to record genuine unplanned visits for approved Doctors and Clinics. Unlike Yearly Plans, Quick Visits do not require an approval workflow. Once saved, the visit is automatically approved and synchronized with planning and reporting modules, ensuring consistent operational data.

ii. Key Features

- Create instant unplanned visits
- Supports approved Doctors and approved Clinics only
- Select Clinic based on selected Doctor
- Specify visit date and time
- Tag medicines/PPTs from organization catalogue
- Automatic approval
- Automatic synchronization with Yearly Plan
- Automatic synchronization with Monthly Plan
- Included in Visit Statistics and Reports

iii. Role-wise Accessibilities

Feature	Executive	Manager	MR
Create	Yes	Yes	Yes
Edit Before Save	Yes	Yes	Yes
Approval Required	No	No	No
View	Organization	Team	Own

iv. Visibility

Quick Visits are displayed according to the logged-in user's organizational hierarchy.

Executive: All Quick Visits within the organization.
Manager: Quick Visits belonging to the manager and reporting MRs.
Medical Representative: Only own Quick Visits.

v. Quick Visit Creation

Users initiate a Quick Visit by clicking the Quick Visit button from the Dashboard. The Quick Plan dialog allows the user to select an approved Doctor, choose one of the Doctor's approved Clinics, specify the visit date and time, tag medicines/PPTs from the organization catalogue and save the visit.

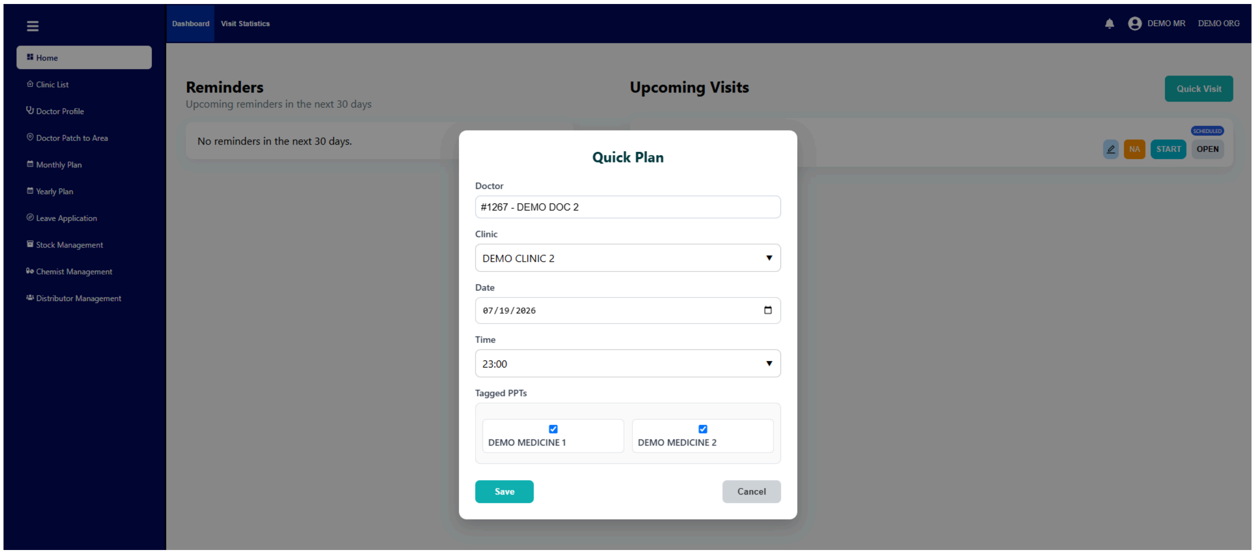

Figure 8.1 – Quick Visit Creation

vi. Automatic Synchronization

```
Quick Visit Saved
     |
     ▼
Automatically Approved
     |
     ├── Visit Record Created
     ├── Reflected in Yearly Plan
     ├── Reflected in Monthly Plan
     ├── Updated in Visit Statistics
     └── Included in Reports
```

vii. Workflow

Approved Doctor & Approved Clinic → Create Quick Visit → Save → Automatically Approved → Synchronized with Yearly Plan → Monthly Plan → Visit Statistics → Reports

viii. Business Rules

- Quick Visits can be created only for approved Doctors and approved Clinics.
- Quick Visits do not require approval.
- Every Quick Visit is automatically approved.
- Medicines/PPTs are selected from the organization catalogue.
- Every Quick Visit is synchronized with Yearly Plan and Monthly Plan.
- Visit Statistics and Reports are updated automatically.

ix. Business Benefits

- Supports genuine unplanned business visits.
- Maintains planning consistency.
- Improves field productivity.
- Provides accurate operational reporting.
- Eliminates manual approval effort and delay.

9. Visit Execution

i. Overview

The Visit Execution module enables Medical Representatives to perform planned and valid Quick Visits while ensuring visit authenticity through GPS verification. The module supports clinic correction, medicine presentation, visit execution, visit completion and note capture, providing accurate operational records and trustworthy field activity.

ii. Key Features

- Edit planned clinic before starting the visit
- Read-only visit information to preserve planning integrity
- GPS validation within 100 metres before Start and Stop
- Real-time visit status tracking
- Medicine/PPT presentation mode
- Visit notes capture after completion
- Offline Visit Execution with automatic synchronization
- Automatic update of Visit Statistics, Reports and Expense processes

iii. Role-wise Accessibilities

Feature	Executive	Manager	MR
Execute Visits	Own	Own	Own
Edit/Change Clinic	Own	Own	Own
GPS Validation	Own	Own	Own
View	Organization	Team	Own

iv. Visibility

Executives can view organization visits, Managers can view team visits and Medical Representatives can view only their own visits.

v. Edit Visit (Change Clinic)

Before starting a planned visit, the user may change only the Clinic when the Doctor is available at another approved Clinic assigned to the same MR. Doctor, Date, Time and tagged medicines remain read-only to preserve planning integrity.

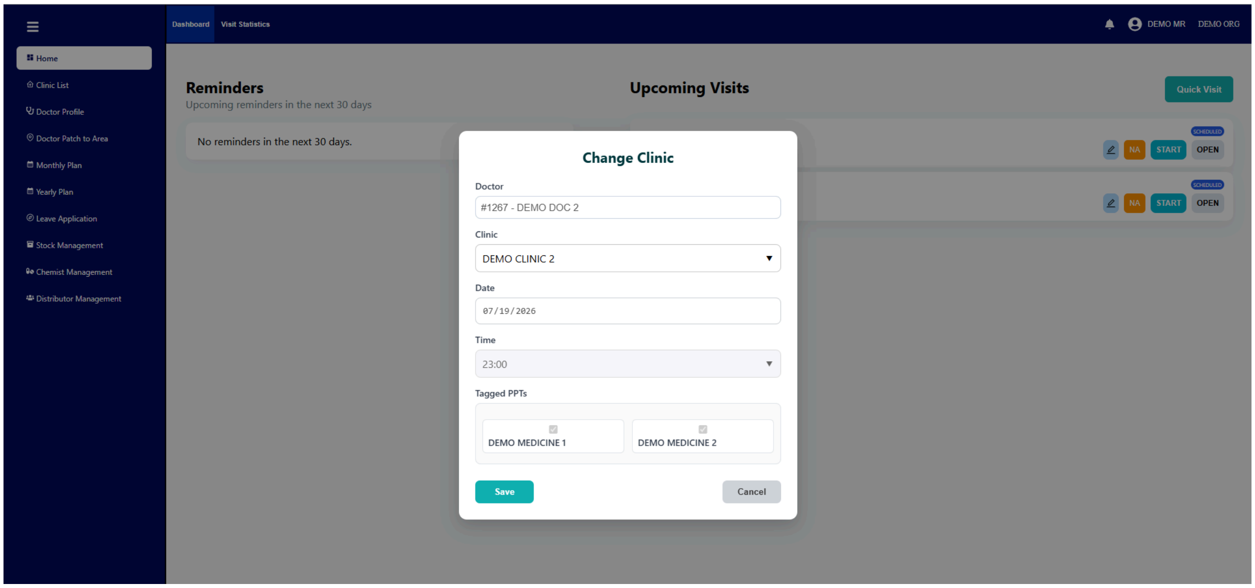

Figure 9.1 – Edit Visit (Change Clinic)

vi. Start Visit with GPS Validation

When Start is clicked, the application fetches the current GPS location and validates that the MR is within 100 metres of the planned Clinic. If validated, the visit status changes to In Progress. If outside the permitted radius, a 'You are not within 100 metres' message is displayed. If GPS is disabled or the location cannot be retrieved, an error with Retry option is shown.

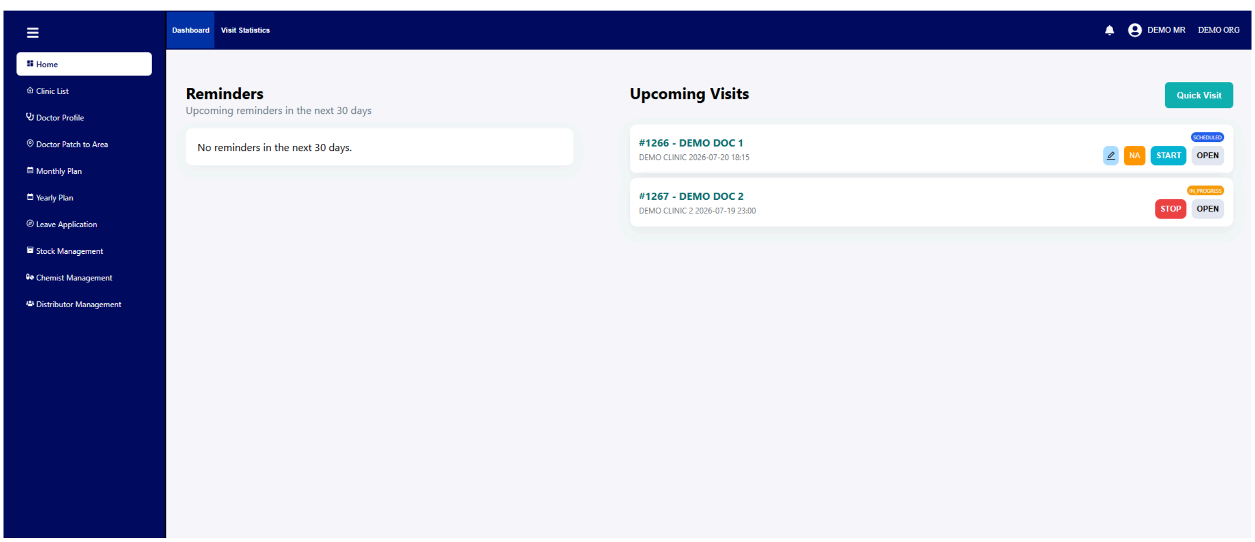

Figure 9.2 – Visit In Progress

Visit execution is fully supported even when internet connectivity is unavailable. After successful GPS validation, visit information is securely stored on the device and automatically synchronized with the server once connectivity is restored.

vii. Medicine / PPT Viewer

The Open action launches a presentation mode displaying tagged medicine images. The MR can swipe or navigate through medicines while discussing products with the Doctor.

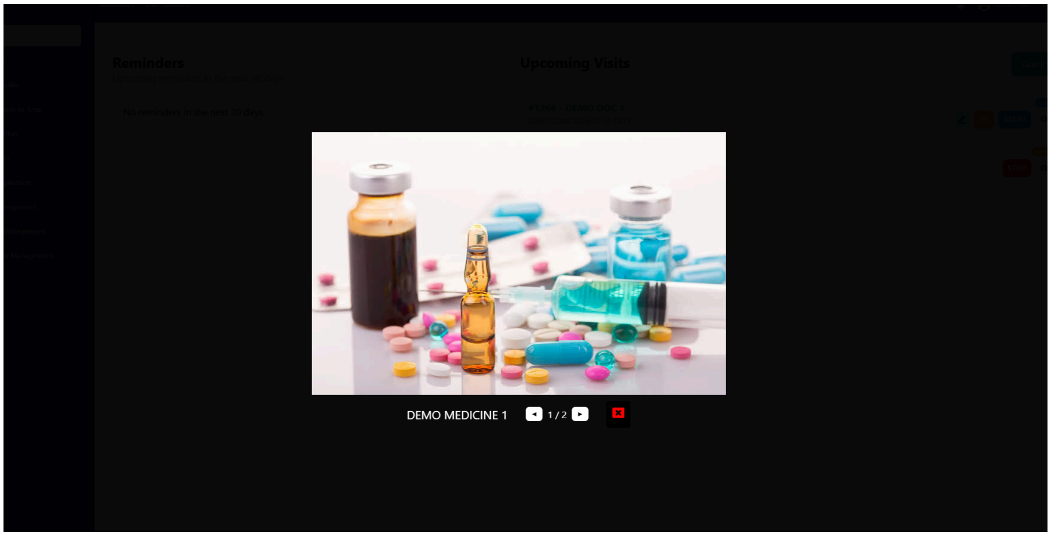

Figure 9.3 – Medicine/PPT Viewer

viii. Stop Visit

Stopping a visit performs the same GPS validation as Start Visit. The visit can be completed only when the MR is within 100 metres of the Clinic, ensuring the visit was concluded at the actual location.

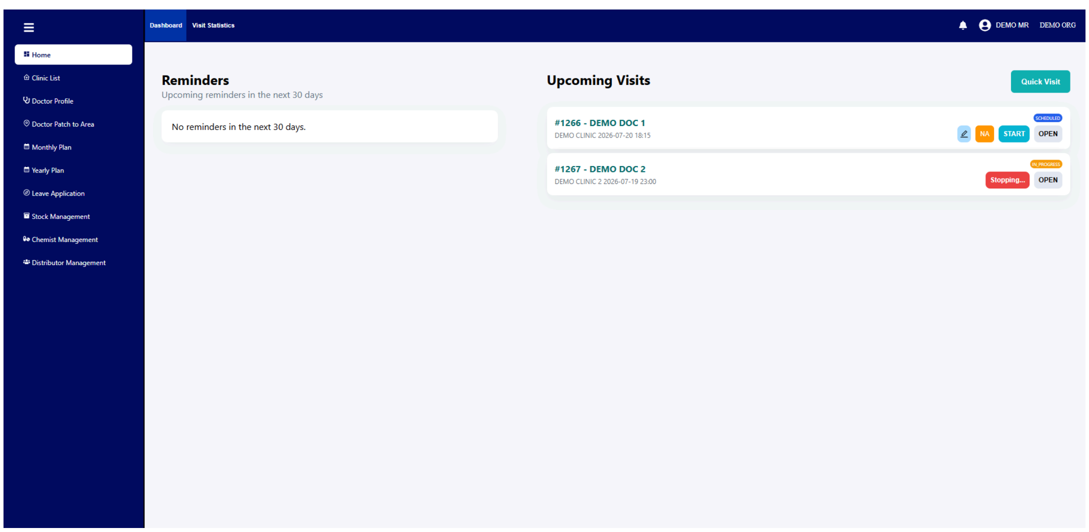

Figure 9.4 – Stop Visit

Visit completion can also be performed in Offline Mode. GPS validation is still performed using the device location. Completion details are stored locally and synchronized automatically when internet connectivity becomes available.

ix. Visit Notes

After a successful stop, the Visit Notes dialog is displayed. The MR can capture optional discussion notes which are stored with the visit and later visible and editable in Visit Statistics.

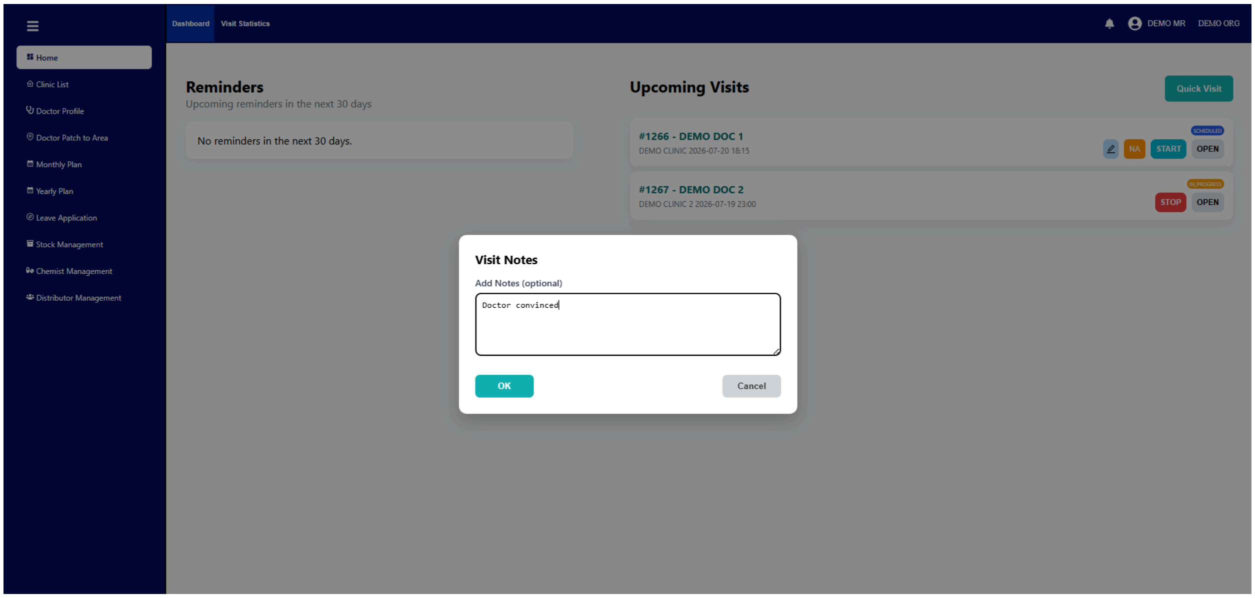

Figure 9.5 – Visit Notes

x. Workflow

Today's Planned Visit → (Optional) Change Clinic → GPS Validation → Start Visit (Online/Offline) → Medicine/PPT Presentation → GPS Validation → Stop Visit (Online/Offline) → Capture Visit Notes → Automatic Synchronization (if Offline) → Visit Statistics, Reports & Expense Summary Updated

xi. Business Benefits

- Ensures genuine field visits through GPS verification
- Prevents fraudulent visit reporting
- Provides flexibility when Doctors change Clinics
- Improves product presentation using medicine slides
- Captures valuable field insights through visit notes
- Enhances reporting accuracy and customer confidence

- Supports uninterrupted field operations in low-network areas.

- Reduces dependency on internet connectivity while maintaining complete data integrity.

10. Chemist Management

i. Overview

The Chemist Management module enables organizations to maintain approved chemist master data, capture structured feedback, manage remarks, maintain medicine availability and visualize chemist locations using Google Maps.

ii. Key Features

- Create Chemists
- Google Places Search
- Current Location
- Approval Workflow
- Location Map
- Medicine Availability
- Chemist Feedback
- Remarks

iii. Role-wise Accessibilities

Feature	**Executive**	**Manager**	**MR**
Create Chemist	Yes	Yes	Yes
Approve Chemist	Yes	Yes	No
View	Organization	Organization	Organization
Feedback Questions	Yes	Yes	No
Submit Feedback	Yes	Yes	Yes
Remarks	Yes	Yes	Yes

iv. Create Chemist

Create chemist using current location, map pin or searching addresses.

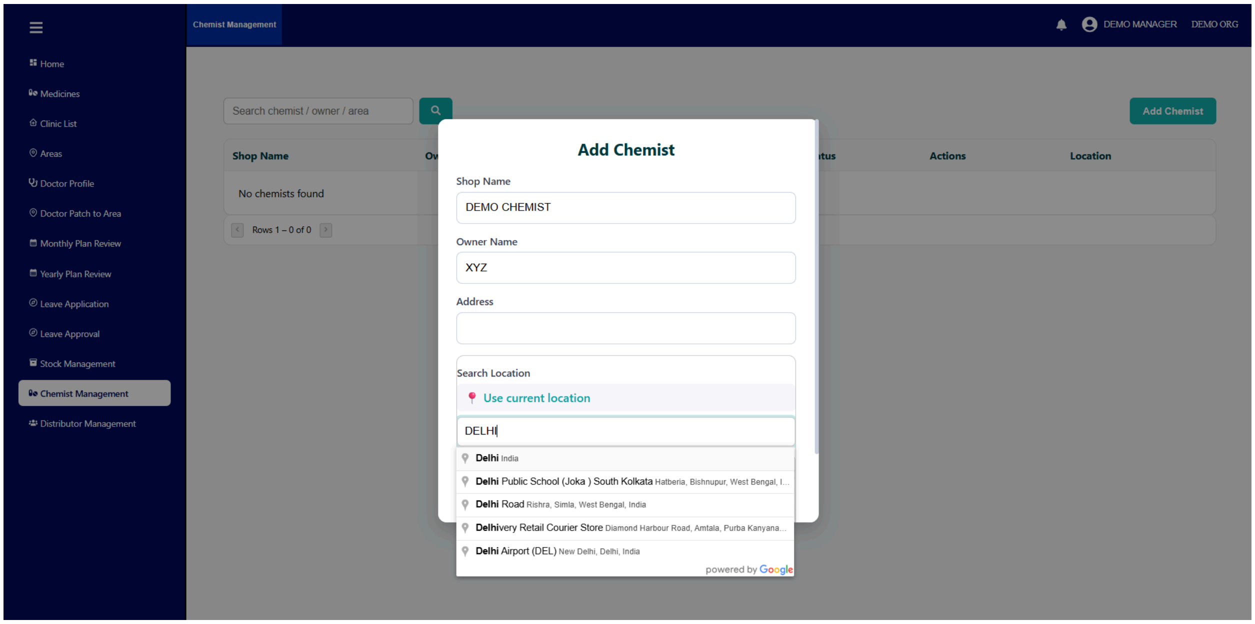

Figure 10.1 - Create Chemist

v. Chemist Approval

Draft chemists require Executive/Manager approval.

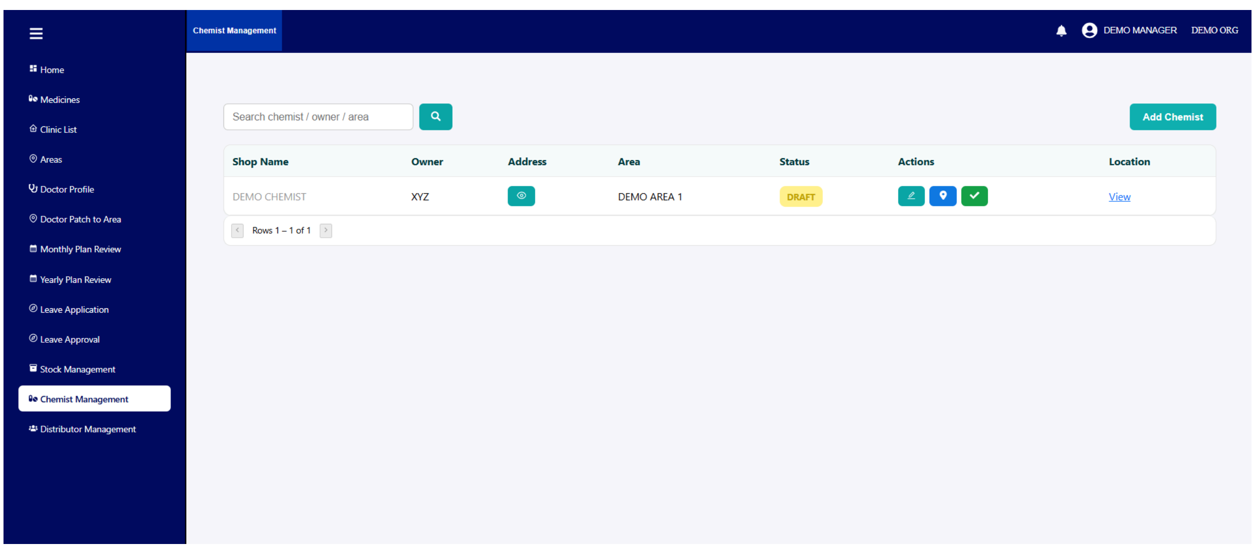

Figure 10.2 - Chemist Approval

vi. View Chemist Location

Displays chemist location on Google Maps.

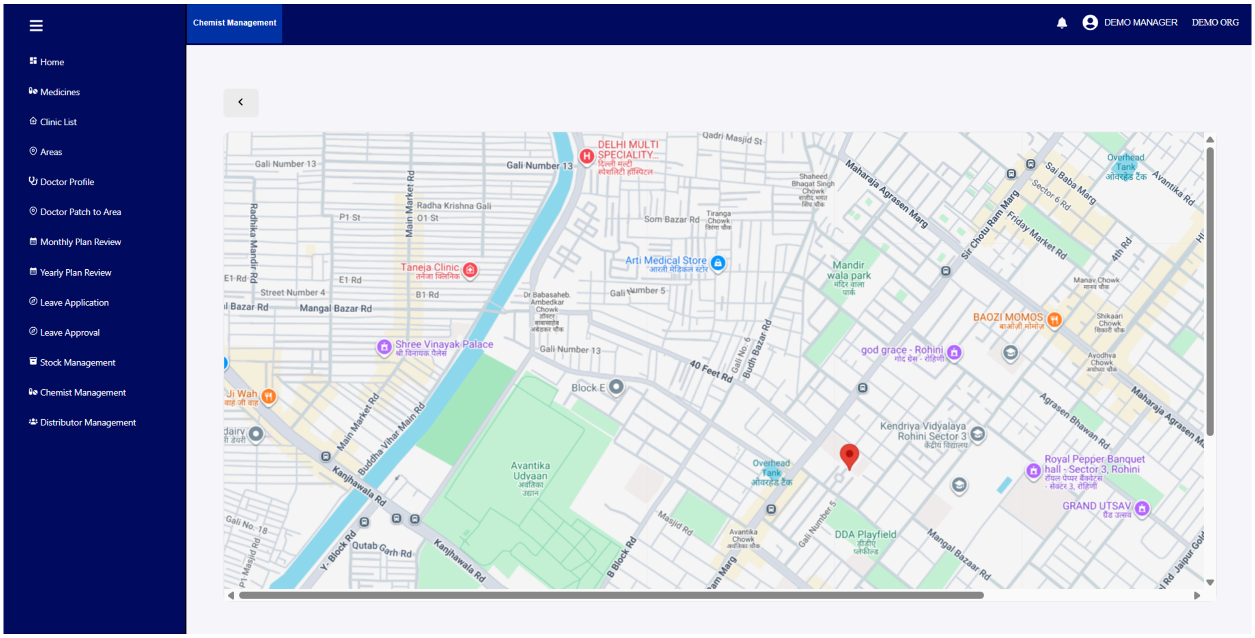

Figure 10.3 - View Chemist Location

vii. Chemist Medicines

Maintain medicines, availability and sales.

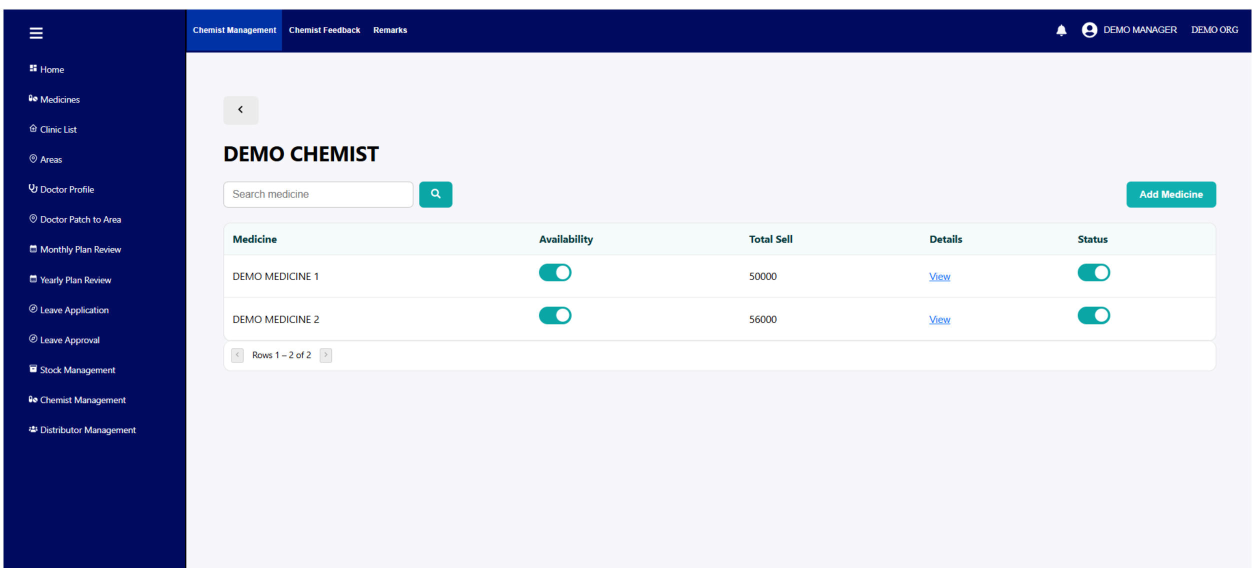

Figure 10.4 - Chemist Medicines

viii. Chemist Feedback

Configure feedback questions.

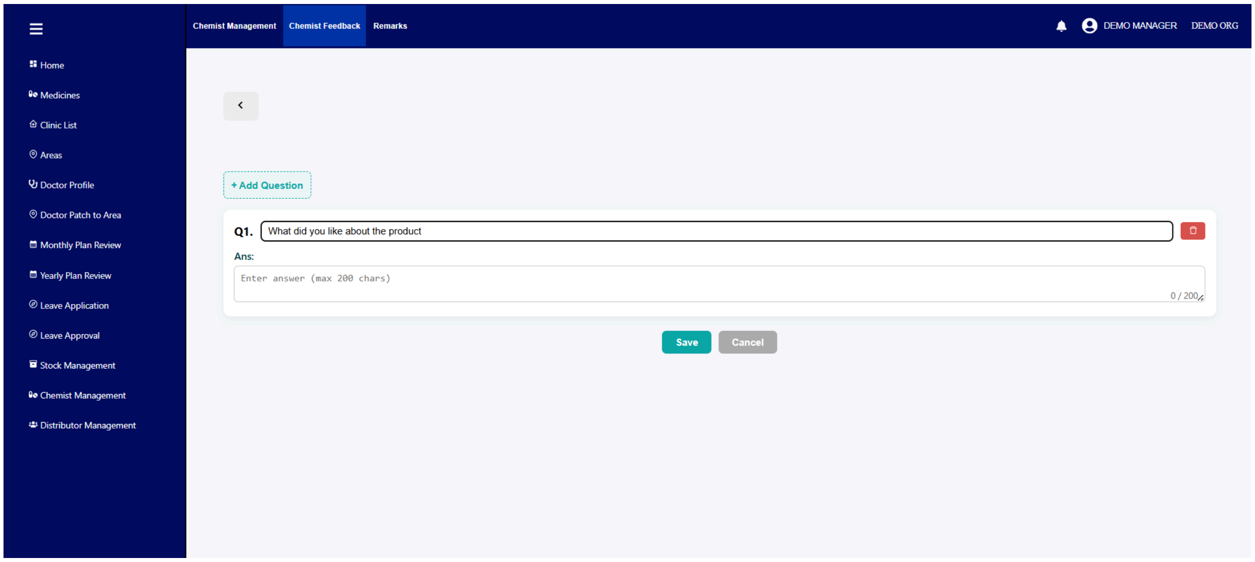

Figure 10.5 - Chemist Feedback

ix. Submit Feedback

MR submits responses.

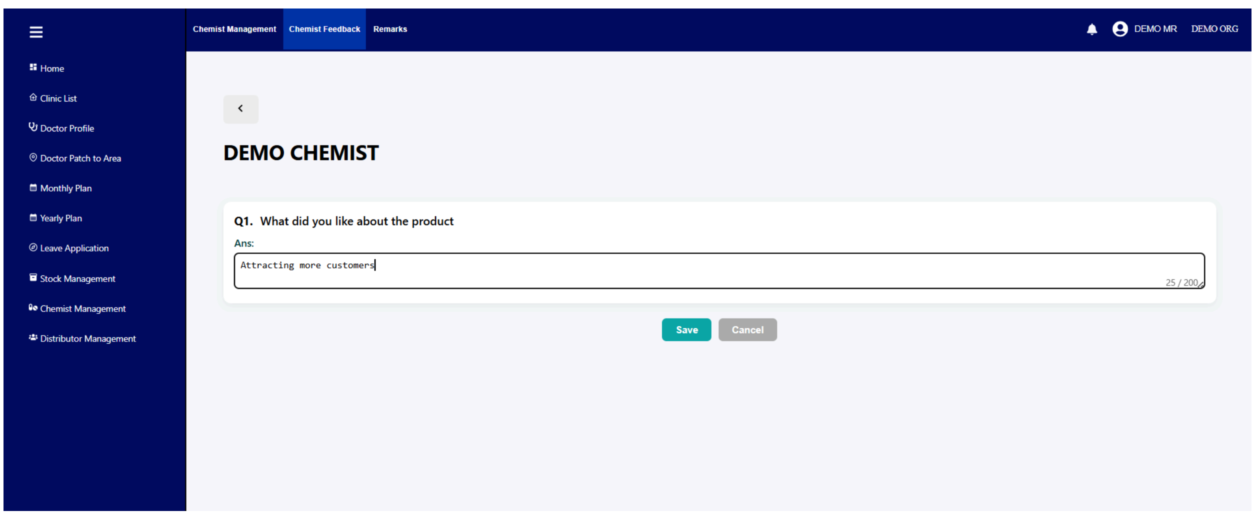

Figure 10.6 - Submit Feedback

x. Chemist Remarks

Maintain interaction remarks.

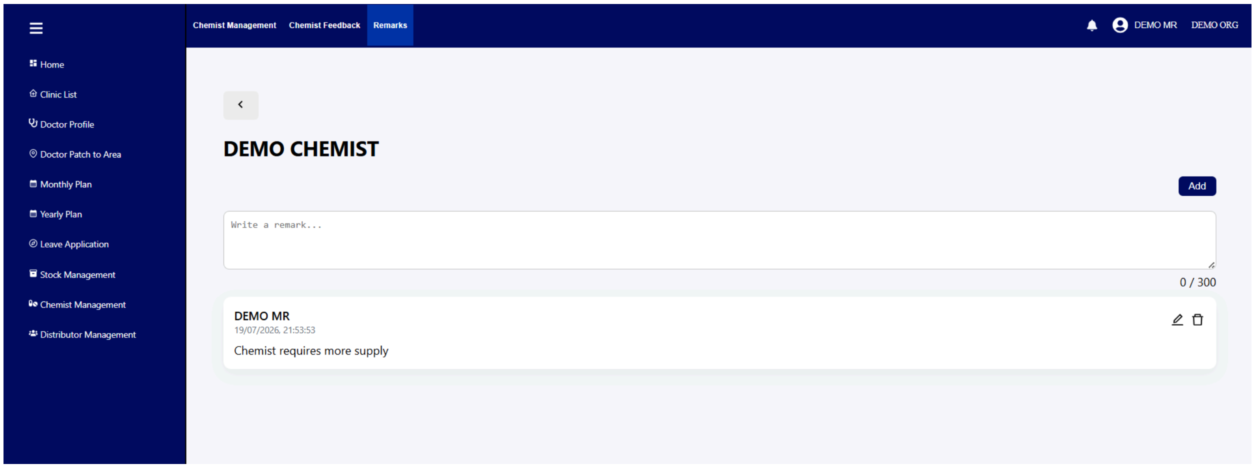

Figure 10.7 - Chemist Remarks

xi. Workflow

Create Chemist → Submit → Approval → Approved Chemist → Medicines → Feedback → Remarks

xii. Business Rules

- Only approved chemists are operational.
- Only Executives and Managers approve chemists.
- Users can edit only their own remarks.
- Google Maps location is stored.
- Approved chemists are visible across the organization.

xiii. Business Benefits

- Centralized master data
- Accurate geo-location
- Structured feedback
- Historical remarks
- Better reporting

11. Distributor Management

i. Overview

The Distributor Management module enables organizations to maintain approved distributor master data, manage distributor meetings, capture medicine orders and maintain distributor interaction history. It standardizes distributor engagement across the organization.

ii. Key Features

- Create Distributor
- Google Places Search
- Current Location
- Approval Workflow
- Distributor Meetings
- Distributor Orders
- Order Status Tracking
- Google Maps Location

iii. Role-wise Accessibilities

Feature	Executive	Manager	MR
Create Distributor	Yes	Yes	Yes
Approve Distributor	Yes	Yes	No
View Distributor	Organization	Organization	Organization
Distributor Meetings	Yes	Yes	Yes
Distributor Orders	Yes	Yes	Yes

iv. Create Distributor

Create a distributor by entering the firm name, owner details, address and selecting the location using Google Places or the current device location.

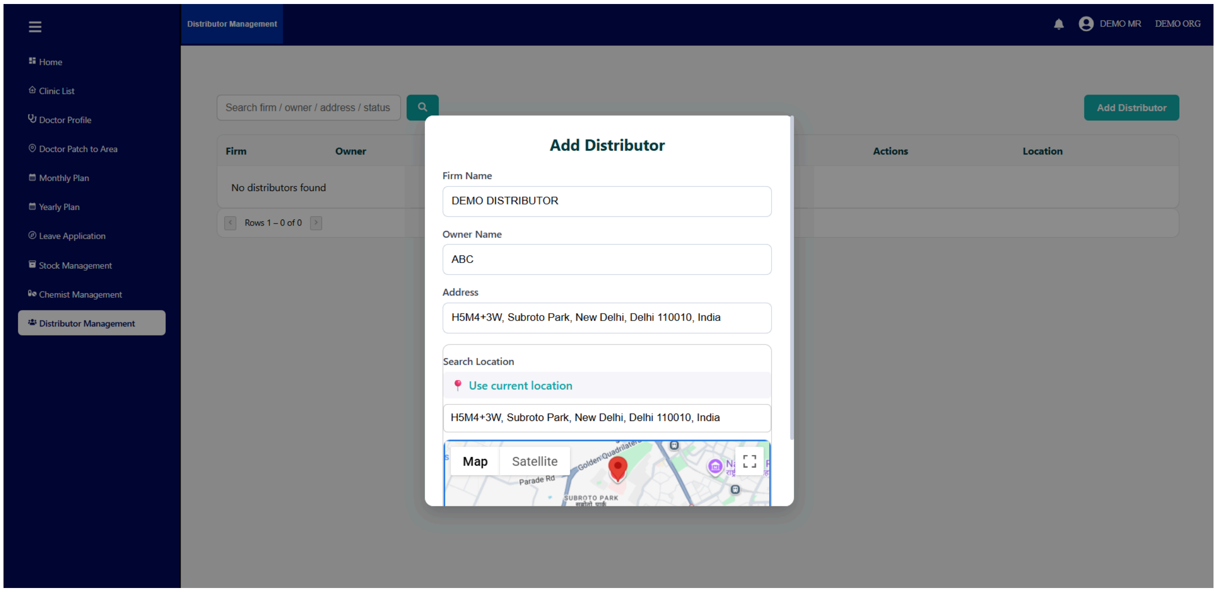

Figure 11.1 - Create Distributor

v. Distributor Approval

Executive or Manager reviews submitted distributors and approves or rejects them. Only approved distributors become operational.

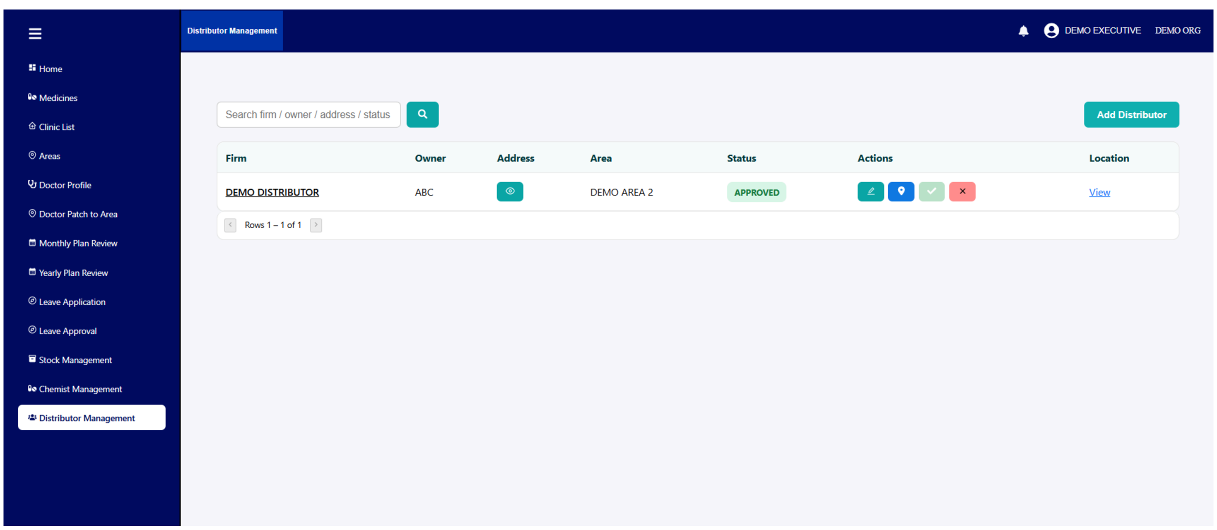

Figure 11.2 - Distributor Approval

vi. View Distributor Location

Displays distributor location on Google Maps.

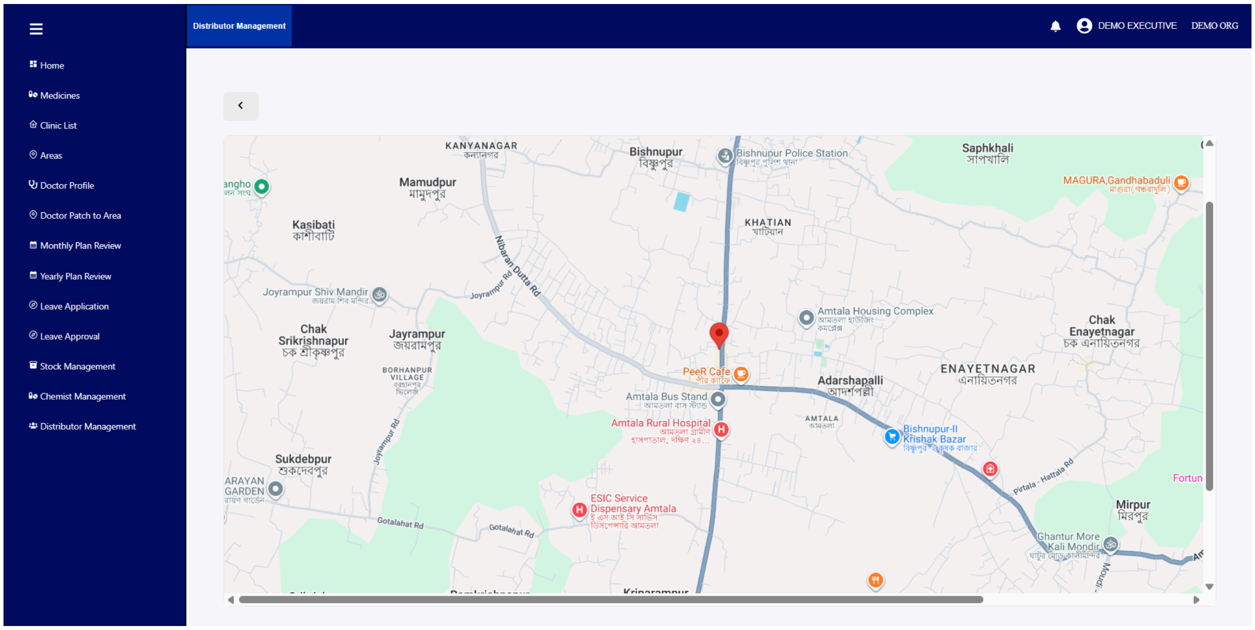

Figure 11.3 - View Distributor Location

vii. Distributor Meetings

Users can record the meeting date, discussion points and next action for follow-up.

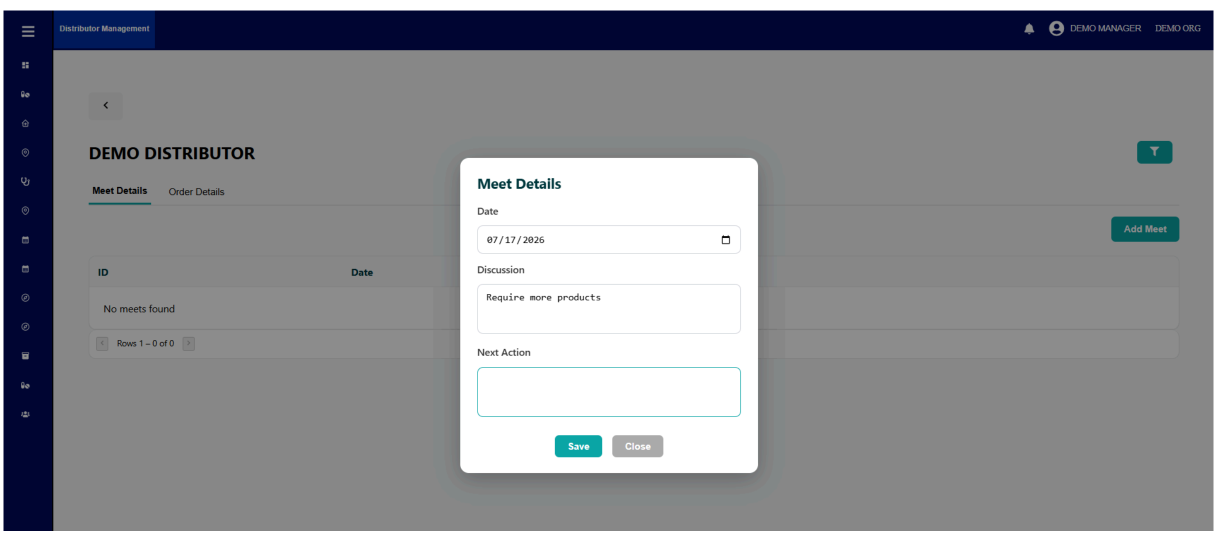

Figure 11.4 - Distributor Meeting

viii. Distributor Orders

Capture distributor orders by selecting medicines, entering quantities and saving the order.

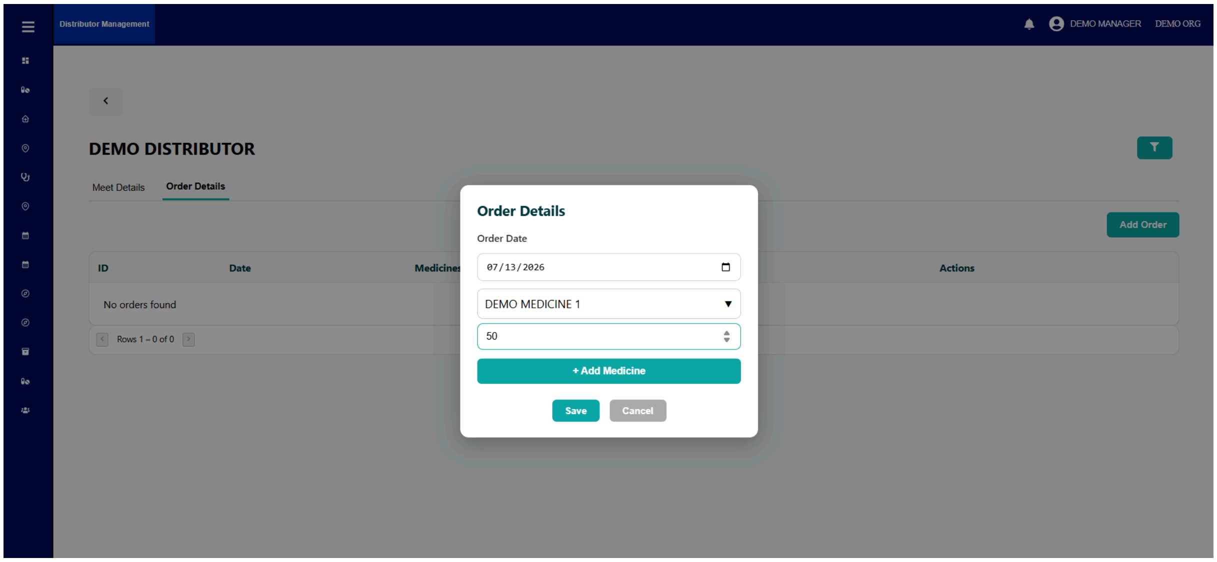

Figure 11.5 - Distributor Order

ix. Order Management

View distributor orders, update order status and maintain order history.

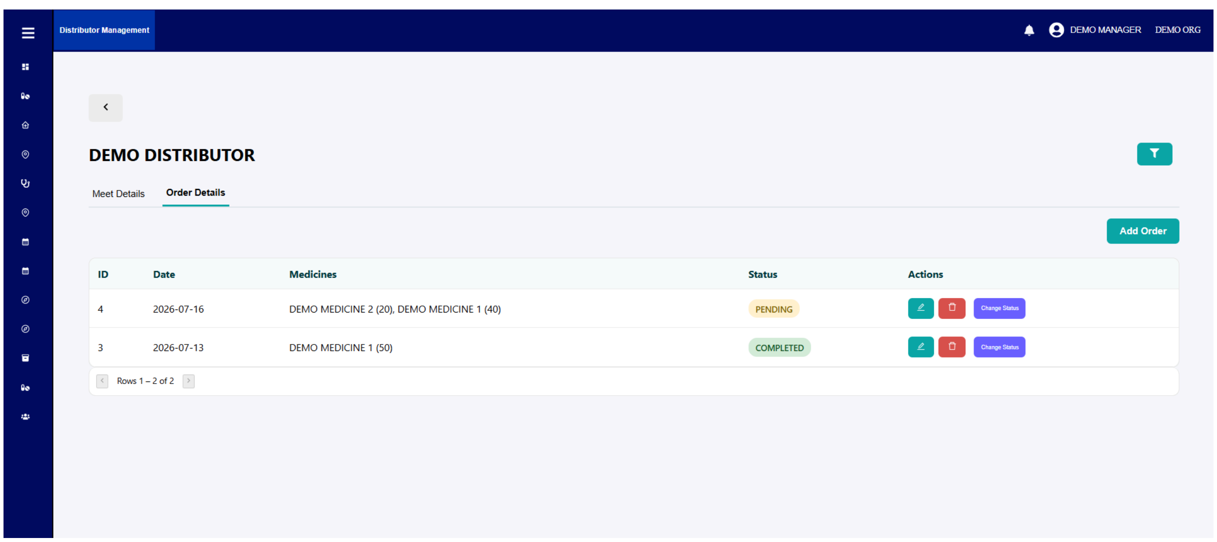

Figure 11.6 - Order Management

x. Workflow

Create Distributor → Submit → Executive/Manager Approval → Approved Distributor → Meetings → Orders → Reporting

xi. Business Rules

- Only approved distributors are operational.

- Only Executives and Managers can approve distributors.
- Approved distributors are visible across the organization.
- Meetings maintain discussion history and next actions.
- Orders support pending/completed status tracking.
- Order information contributes to operational reporting.

xii. Business Benefits

- Centralized distributor master data
- Improved distributor relationship management
- Structured meeting history
- Order lifecycle tracking
- Better sales visibility and reporting

12. Stock Management

i. Overview

The Stock Management module enables users to maintain monthly medicine stock information for their organization. It provides opening stock, primary stock received, secondary stock distributed and closing balance, giving complete month-wise inventory visibility.

ii. Key Features

- Month and Year-wise Stock View
- Medicine Search
- Opening Stock
- Primary Stock
- Secondary Stock
- Closing Balance
- Edit Stock
- Month-to-Month Carry Forward

iii. Role-wise Accessibilities

Feature	Executive	Manager	MR
View Stock	Yes	Yes	Yes
Update Primary Stock	Yes	Yes	Yes
Update Secondary Stock	Yes	Yes	Yes
Edit Stock	Yes	Yes	Yes

iv. Monthly Stock Summary

The stock dashboard displays medicine-wise opening stock, primary stock, secondary stock and closing balance for the selected month.

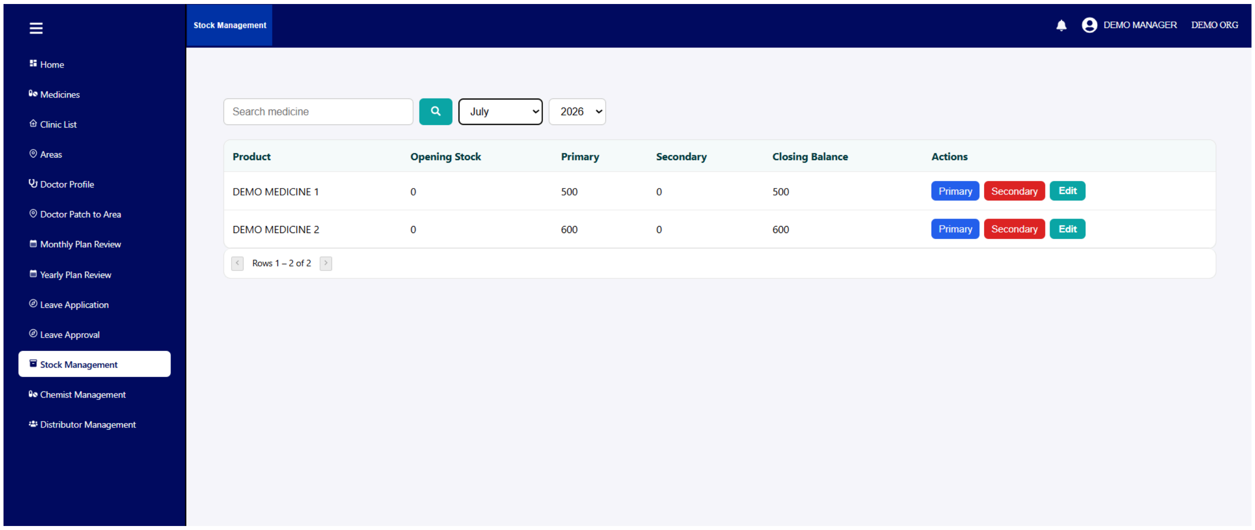

Figure 12.1 - Monthly Stock Summary

v. Opening Stock Carry Forward

Opening stock for a month is automatically derived from the previous month's closing balance, ensuring stock continuity.

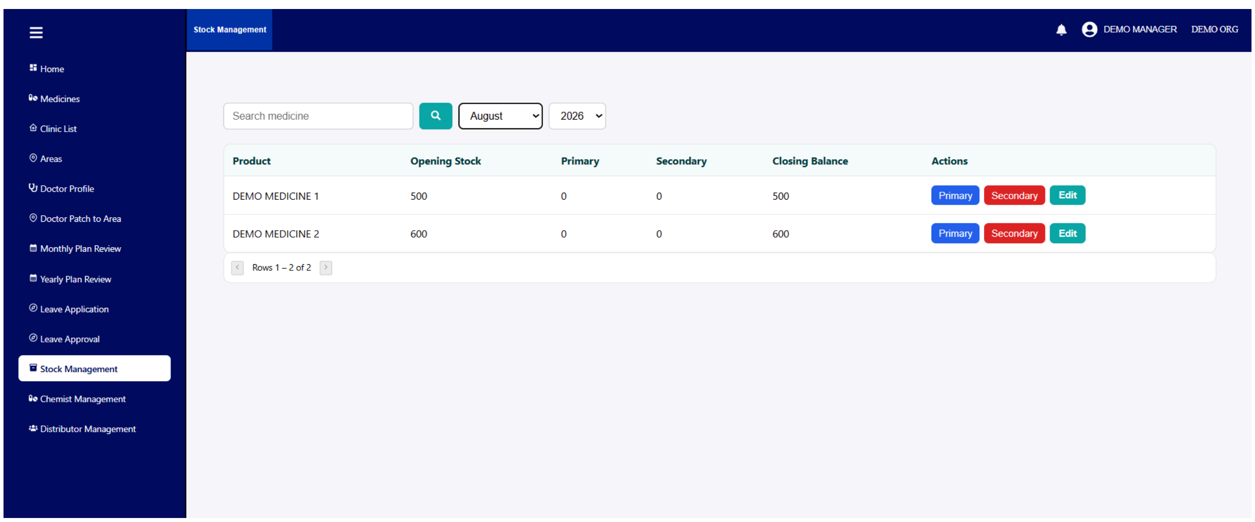

Figure 12.2 - Opening Stock Carry Forward

vi. Workflow

Opening Stock (Previous Month Closing Balance) ⟶ Primary Stock Entry ⟶ Secondary Stock Entry ⟶ Closing Balance Calculated ⟶ Next Month Opening Stock

vii. Business Rules

- All roles can access Stock Management.

- Opening stock of a month is carried forward from the previous month's closing balance.
- Primary and Secondary stock movements update the closing balance.
- Stock is maintained month-wise and year-wise.
- Users work only with their organization's stock information.
- Stock information supports operational visibility and reporting.

viii. Business Benefits

- Accurate month-wise inventory tracking
- Automatic stock carry-forward
- Improved inventory visibility
- Supports operational planning
- Better reporting and stock reconciliation

13. Leave Management

i. Overview

The Leave Management module enables Executives, Managers and Medical Representatives (MRs) to manage leave requests through a structured approval workflow. The module maintains yearly leave allocation, available leave balance, leave history, supporting documents and notifications.

ii. Key Features

- Yearly Leave Balance
- Available Leave Balance
- Apply Leave
- Leave Approval
- Search & Filter
- Supporting Document Upload (PDF)
- Approve / Reject Leave
- Notifications
- Leave History

iii. Role-wise Accessibilities

Feature	**Executive**	**Manager**	**MR**
Apply Leave	Yes	Yes	Yes
Allocate Yearly Leave	Yes	Yes	No
Approve Leave	Yes	Yes	No
View Leave History	Yes	Yes	Yes

iv. Leave Application

Users can view yearly leave allocation, available leave balance and submit leave requests by selecting leave type, start date, end date and uploading supporting documents (PDF). Supporting documents are mandatory for Sick Leave.

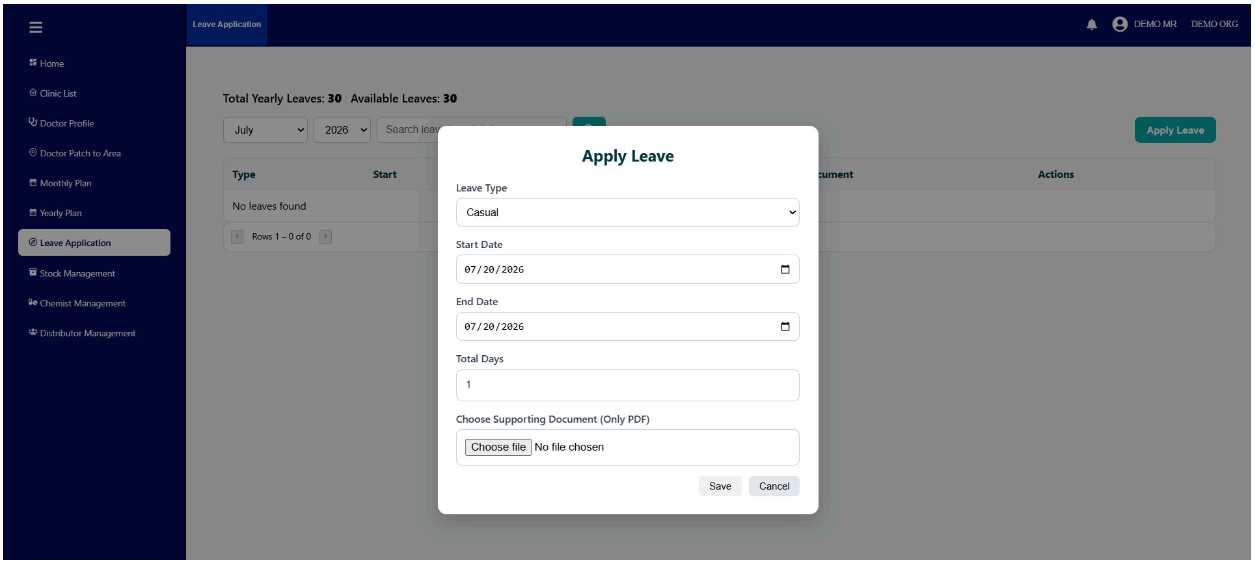

Figure 13.1 - Leave Application

v. Leave Approval

Managers and Executives review pending leave requests, search requests, verify supporting documents and approve or reject requests.

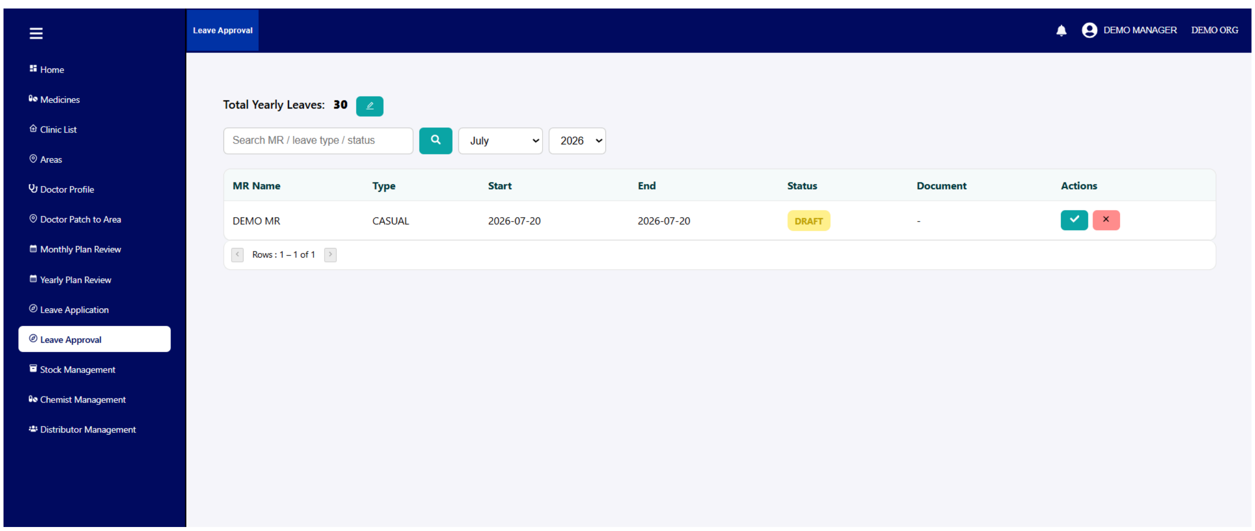

Figure 13.2 - Leave Approval

vi. Leave Notifications

After approval or rejection, applicants receive an in-application notification informing them of the leave decision.

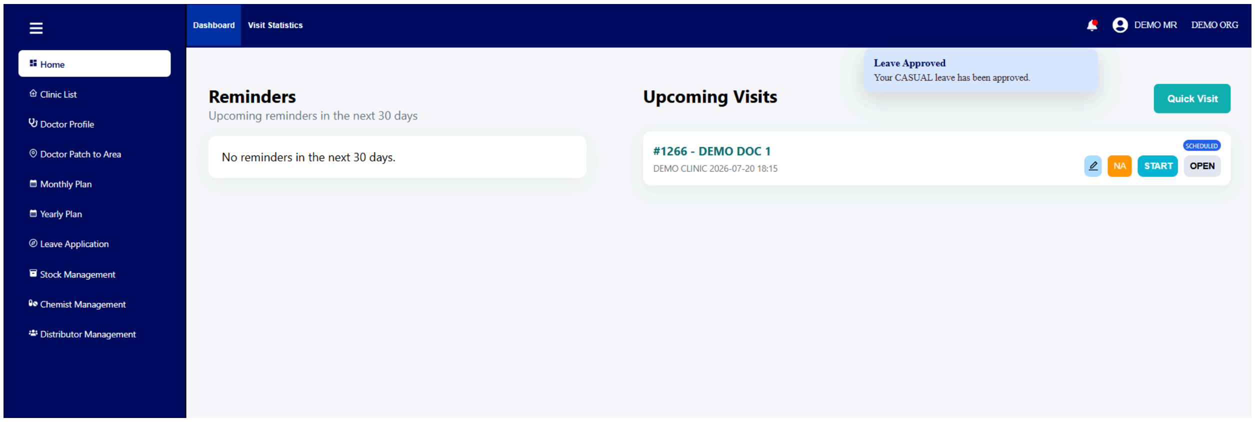

Figure 13.3 - Leave Notification

vii. Workflow

Allocate Yearly Leave → Employee Applies for Leave → Submit Request → Manager/Executive Review → Approve / Reject → Leave Balance Updated → Notification Sent

viii. Business Rules

- Executives and Managers allocate yearly leave entitlements.
- All users can submit leave requests.
- Supporting documents can be uploaded where required and are mandatory for Sick Leave.
- Only authorized approvers can approve or reject leave requests.
- Approved leave automatically updates available leave balance.
- Rejected leave does not affect available leave balance.
- Applicants receive notifications after approval or rejection.

ix. Business Benefits

- Centralized leave management
- Transparent approval workflow
- Accurate leave balance tracking
- Paperless document management
- Improved employee communication through notifications
- Complete leave history and reporting

14. Dashboard

i. Overview

The Dashboard provides a real-time operational overview based on the logged-in user's role. Medical Representatives view only their own operational activities, while Managers and Executives receive consolidated information according to the organizational hierarchy. The module also provides operational reporting through My Worklist, Visit Statistics, Summary, Sales Performance and Expense Summary. The behaviour described here aligns with the Functional Design Document and role definitions.

ii. Role-wise Access

Feature	Executive	Manager	MR	Visibility	Business Scope
Dashboard	Yes	Yes	Yes	Org/Team/Own	Operational overview
My Worklist	Yes	Yes	No	Org/Team	Pending approvals
Visit Statistics	Yes	Yes	Yes	Org/Team/Own	Visit monitoring
Summary	Yes	Yes	No	Org/Team	Business KPIs
Sales Performance	Yes	Yes	No	Org/Team	Sales analytics
Expense Summary	Yes	Yes	No	Org/Team	Expense monitoring

iii. Dashboard

Medical Representative Dashboard

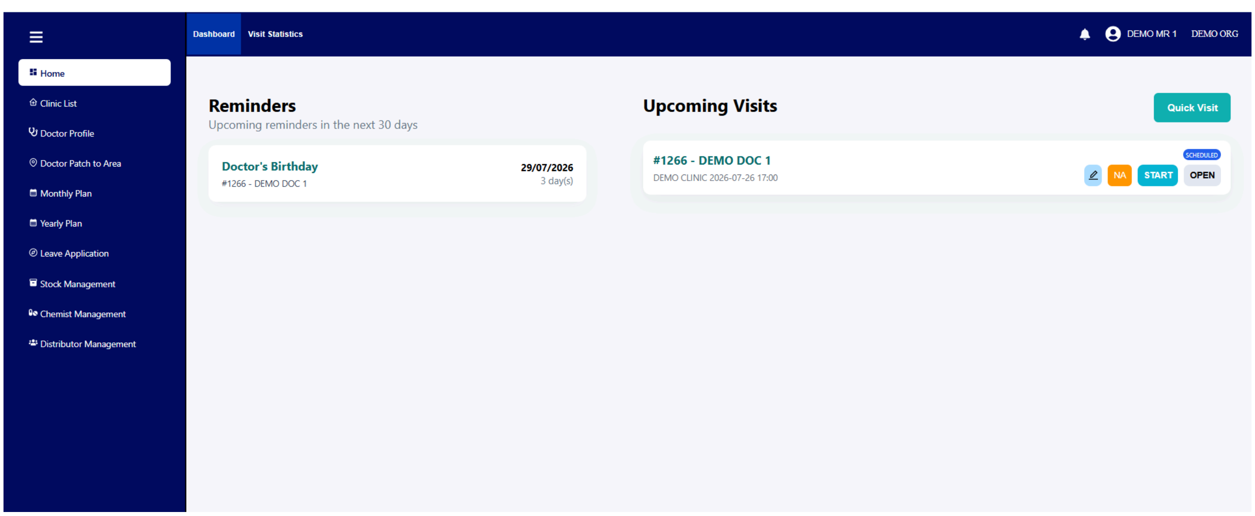

Figure 14.1 – MR Dashboard

• Displays reminders for the next 30 days.
• Upcoming Visits display today's operational visits for that assigned user.
• Visits become visible for execution from 9:00 PM on the previous day until 12:00 PM on the scheduled day.

• If not completed within the operational window, the visit automatically becomes Missed.
• MRs can Start, Open, mark NA or create Quick Visits.
• MRs can access only Dashboard and Visit Statistics and only their own records.

iv. My Worklist

Managers and Executives monitor pending approvals through My Worklist.

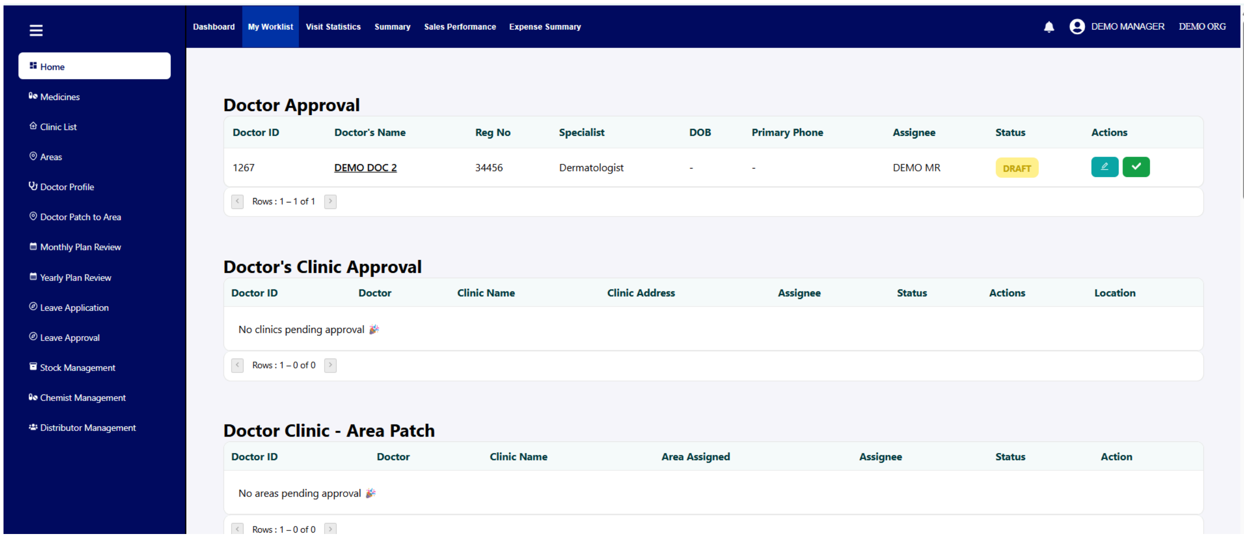

Figure 14.2 – Manager Worklist

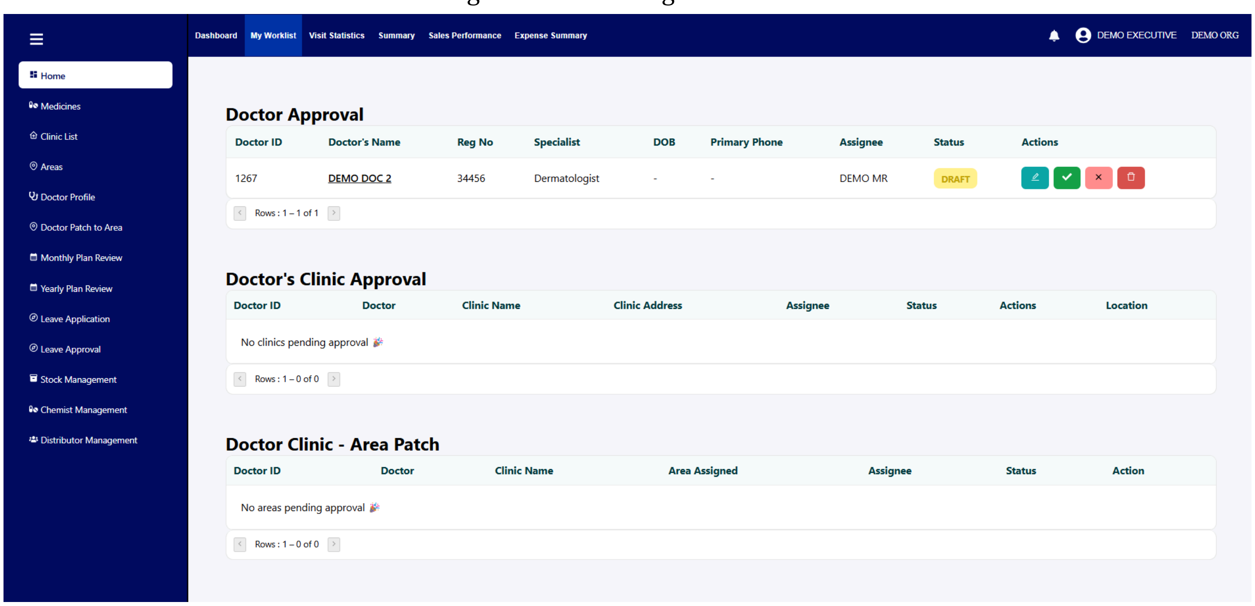

Figure 14.3 – Executive Worklist

Manager Actions:
• Edit
• Approve

Executive Actions:
• Edit

• Approve
• Reject
• Delete

Displays pending Doctor approvals, Clinic approvals, Doctor Clinic–Area Patch approvals, Yearly Plan approvals and other workflow items according to organizational hierarchy.

v. Visit Statistics

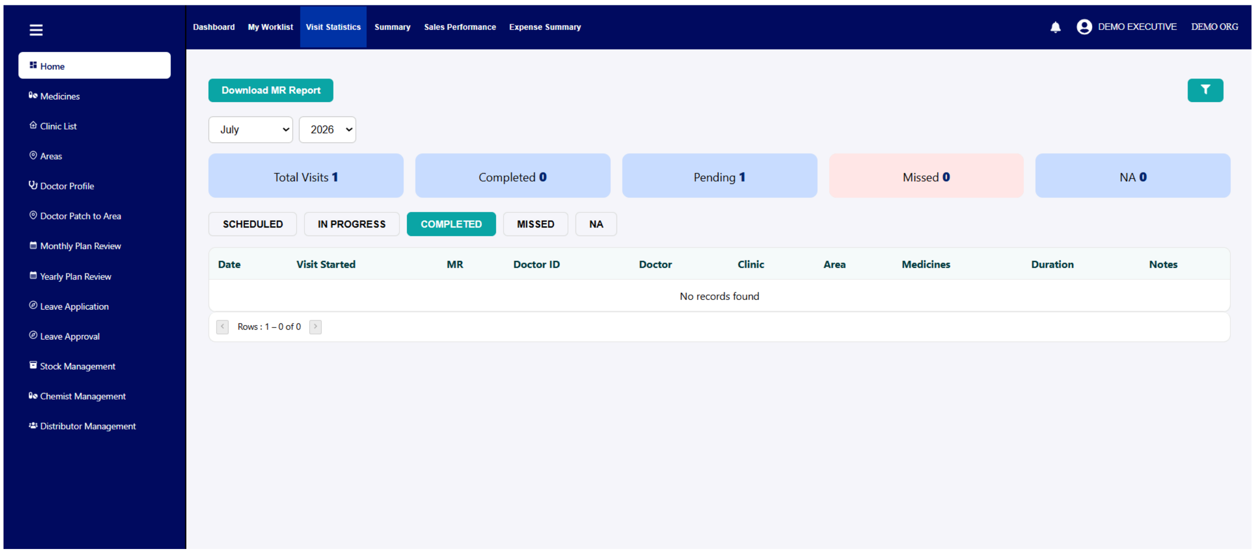

Figure 14.4 – Visit Statistics

Status Definitions:

• Scheduled – Planned visits awaiting execution.
• Pending – Scheduled + In Progress visits.
• Completed – Successfully completed visits.
• Missed – Visits not completed by the end of the assigned day.
• NA – Visits where the doctor was marked as Not Available.

Supports month/year selection, advanced filtering, downloadable MR reports and role-based visibility.

vi. Summary

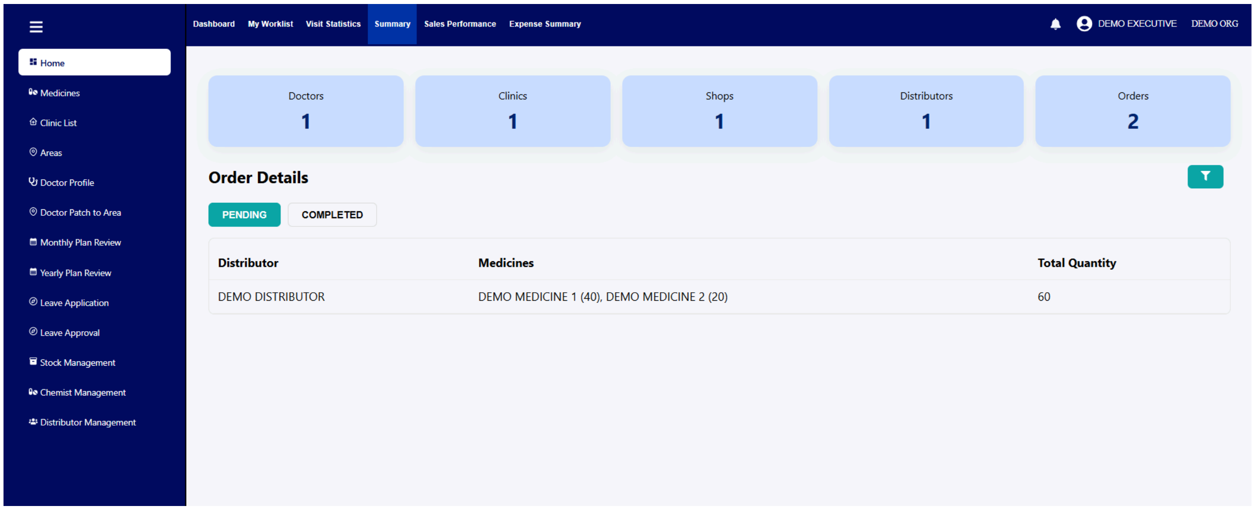

Figure 14.5 – Operational Summary

Displays organization or team KPIs including Doctors, Clinics, Shops, Distributors, Orders and order status (Pending/Completed).

vii. Sales Performance

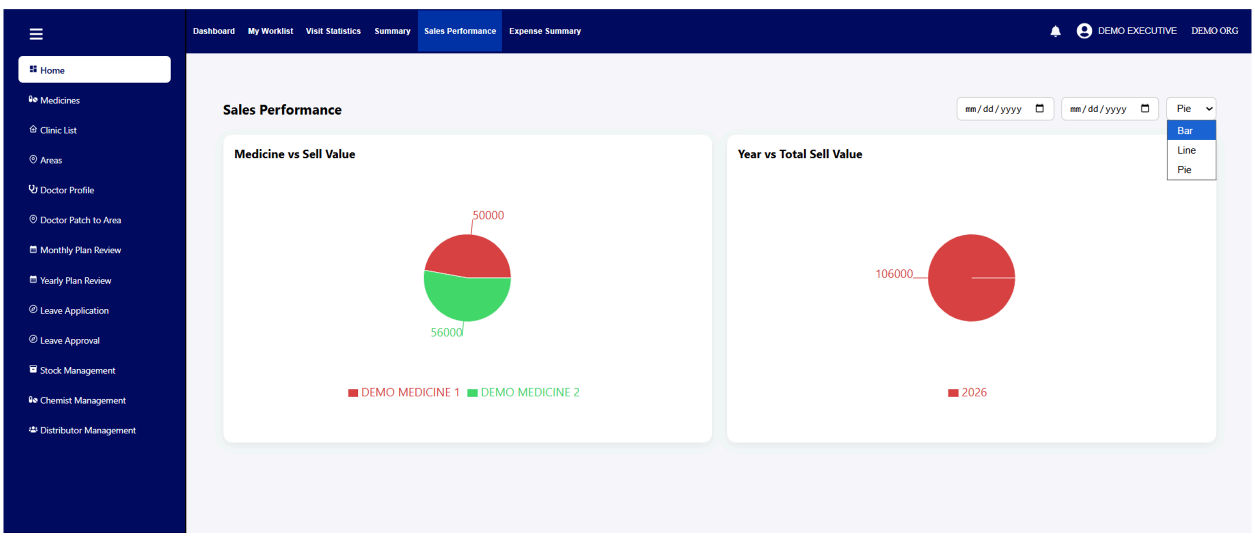

Figure 14.6 – Sales Performance

Provides graphical analysis of Medicine vs Sell Value and Year vs Total Sell Value. Supports Pie, Bar and Line charts with date range filtering.

viii. Expense Summary

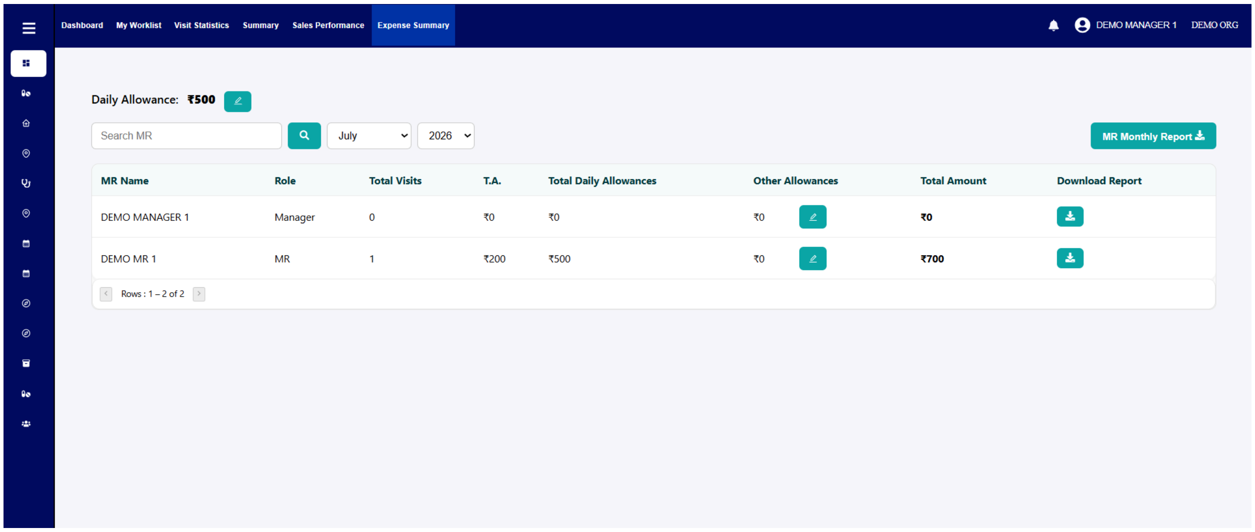

Figure 14.7 – Expense Summary

Displays Daily Allowance, Travelling Allowance (TA), Other Allowances and Total Amount for each user.

Business Rules:

• TA is calculated only from approved Doctor Patch Area records.
• One TA is generated per MR, per Area, per day.
• Multiple visits in the same Area generate only one TA entry.
• Authorized users can configure Daily Allowance and maintain Other Allowances.

ix. Business Benefits

- Role-based operational visibility.
- Real-time monitoring of field activities.
- Faster approval management.
- Improved reporting and decision-making.
- Automated expense calculation.
- Consistent organizational reporting.