

# USER MANUAL

Role: Representative

Terminal: Web

Version: Retail 2.3

# Table of Contents

<b>INTRODUCTION.....</b>	<b>3</b>
1.    PURPOSE OF THE MANUAL .....	3
2.    INTENDED READERSHIP.....	3
3.    HOW TO USE THIS DOCUMENT.....	3
<b>GETTING STARTED.....</b>	<b>4</b>
1.    SYSTEM ARCHITECTURE .....	4
2.    LOGGING ON.....	5
3.    MR DASH BOARD .....	6
4.    BASIC CONCEPTS OF OPERATION .....	7
5.    EXIT SYSTEM.....	9
<b>USING THE SYSTEM .....</b>	<b>100</b>
1.    PLANNING .....	<b>ERROR! BOOKMARK NOT DEFINED.0</b>
a)    Defining and Managing Standard Tour Plan.....	100
b)    Defining and Managing Monthly Tour Plan.....	144
c)    View plan for the month .....	17
2.    FIELD WORK MANAGEMENT .....	20
a)    Record Daily Activity Report .....	20
b)    Record a Non Call Activity (NCA) .....	49
c)    Recording a leave .....	51
d)    Recording General Remarks .....	52
e)    View Daily Activity Report .....	53
f)    View Field Work Analytics.....	56
3.    MASTERS .....	72
a)    Request for addition or deletion of Customer .....	72
b)    View Master Reports.....	77
<b>CONCLUSION.....</b>	<b>81</b>
1.    ERROR MESSAGES & EXPLANATION .....	81

# Introduction

## 1. Purpose of the Manual

This manual contains information for establishing your work using this software. Use this manual as a self-learning textbook. It describes various reporting functions that are provided in the mobile application. It will guide you through each of the facilities within MPower

## 2. Intended Readership

This manual has been written keeping in mind the end-user, who uses the application and which mainly acts as a reference manual.

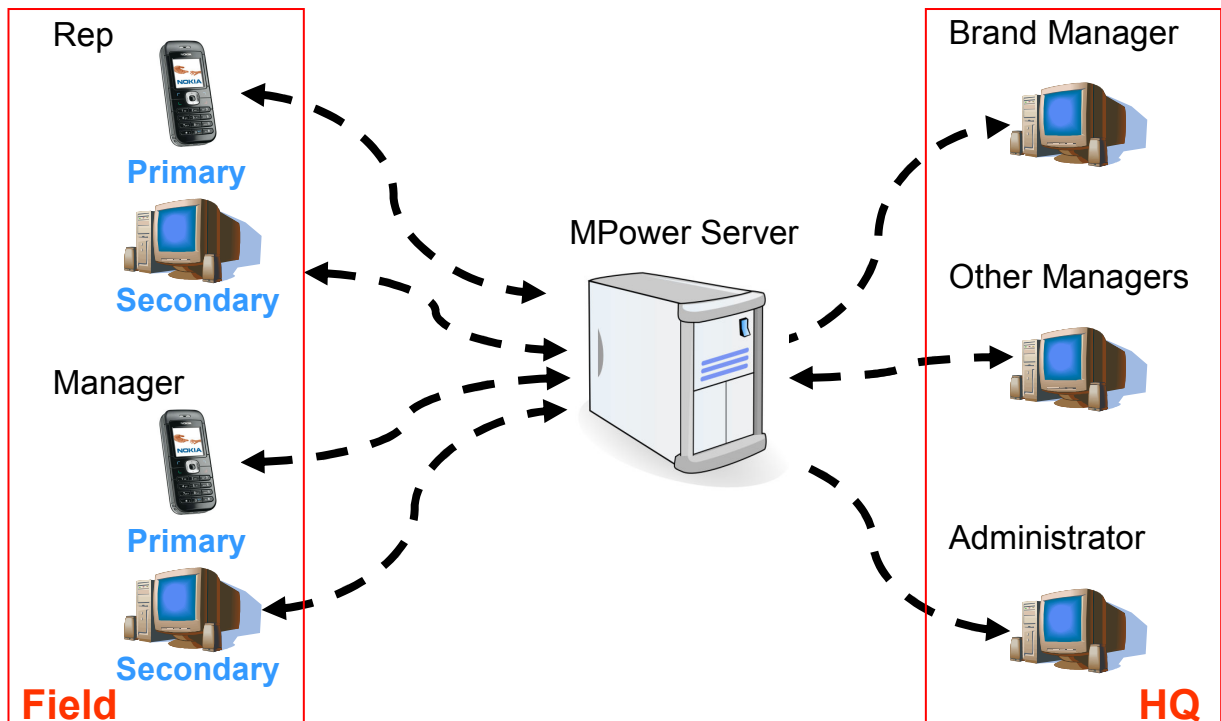
## 3. How to use this document

This manual is designed to get you up and using the MPower application. If you are new to the software we strongly suggest you read through this publication along with the software. It gives step by step description as to how the whole application works. The required functionality can be located in the document from the index. Follow the page number to reach the required functionality. Refer to “Getting there” section to understand how to navigate to the required destination. Follow each step as mentioned in the manual and use the associated graphic images as a guide to check in case of any doubt.

# Getting Started

## 1. System Architecture

The web enabled part of MPower is an internet based system through which the field sales representatives can capture their daily visit reports.

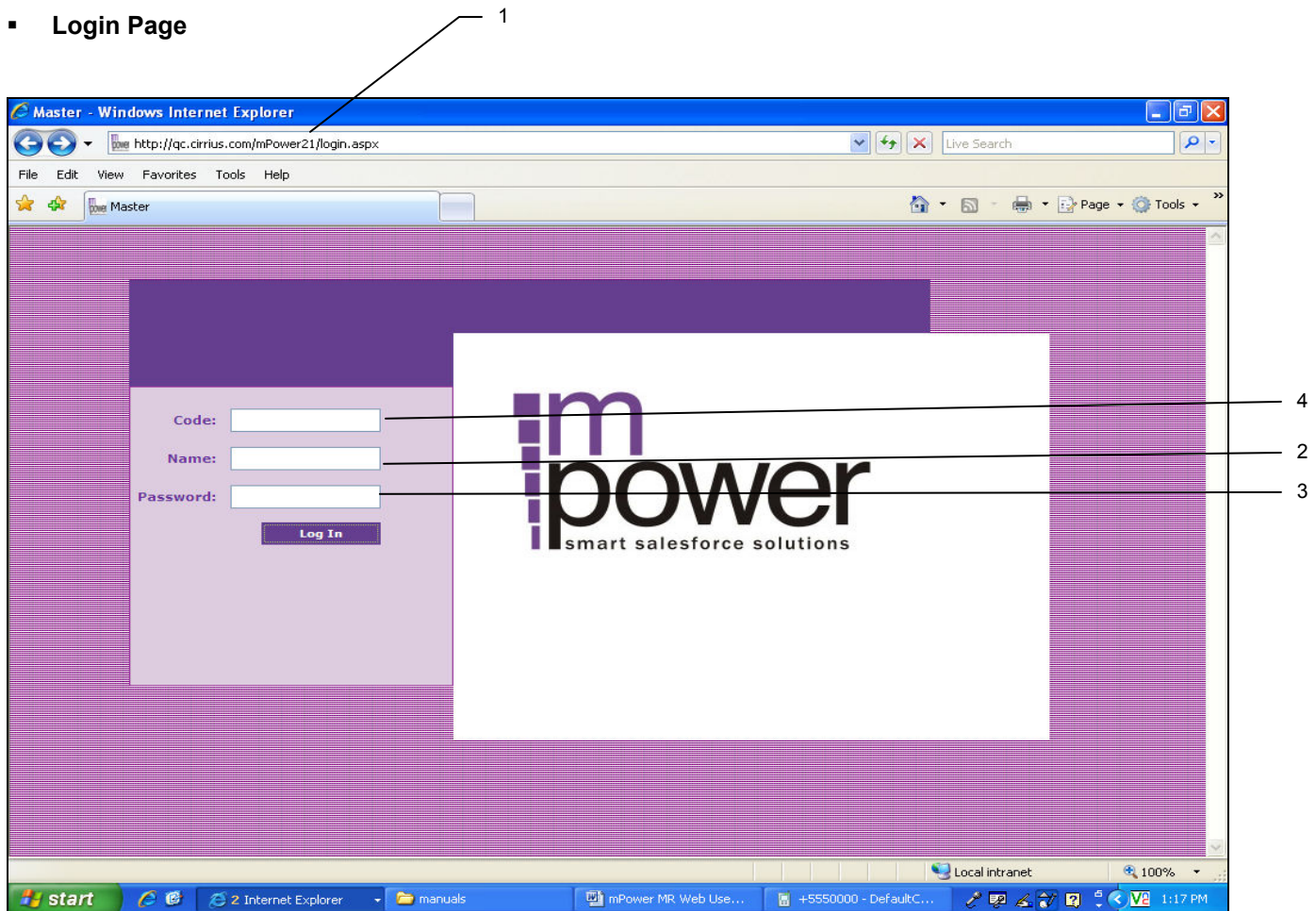


## 2. Logging on

### a) User Login

The MPower application is secured by a user password. On accessing the main MPower web site, you will see a page containing a user code and password.

#### ▪ Login Page

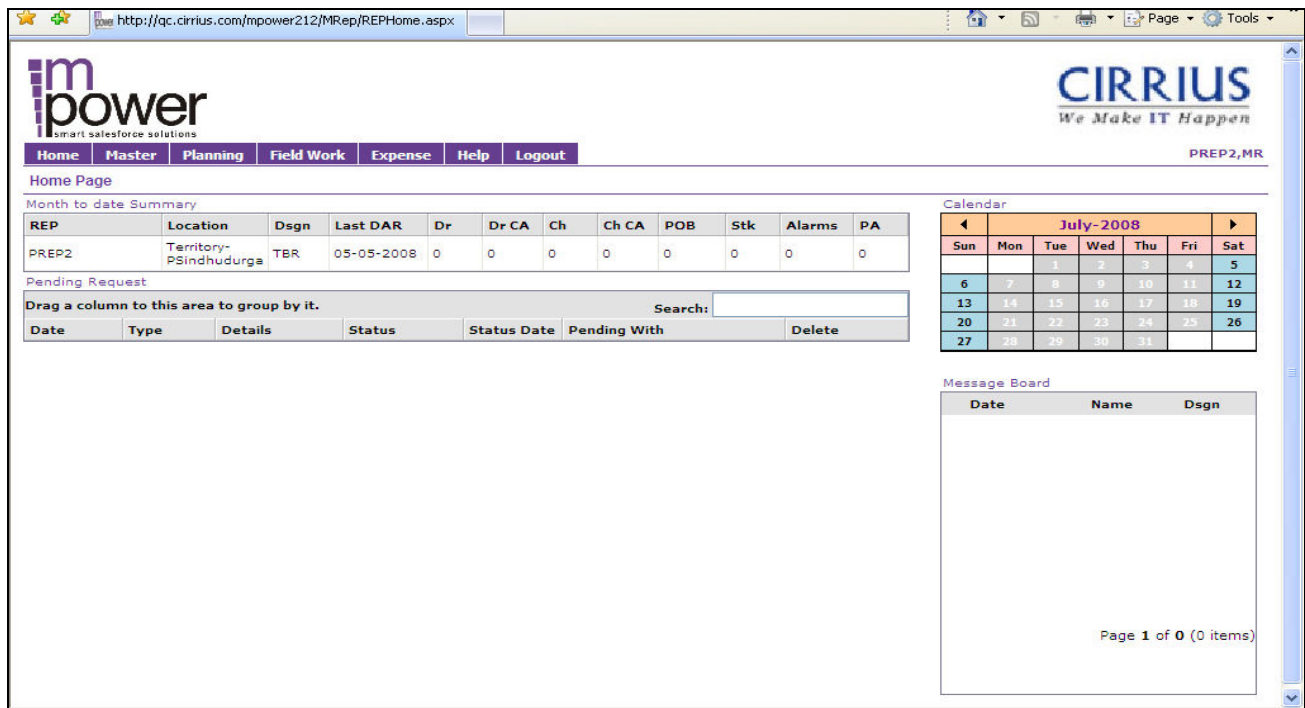


1. Web Site Address
  - a. After opening internet explorer, type in the address bar the name of the MPower web site <http://www.mypower.co.in/> ;
2. Login User Name
  - a. Input the user short name which has been allocated by administrator in the name field.

3. Password entry
  - a. After typing the user code press tab or move the mouse cursor over password field and click. The password has to be entered in the password field. The password will be shown as '\*\*\*\*\*'. After typing password click on LOGIN button.
4. Code: The fixed ID allocated to the customer by CWT. The code will not be readable.

### 3. MR Dash Board

The dash board is a console through which the MR can perform all his activities like managing DAR, Expenses, MTP, Holiday, STP etc. The dash board appears after successful login to the application.



**Month to date Summary**

REP	Location	Dsgn	Last DAR	Dr	Dr CA	Ch	Ch CA	POB	Stk	Alarms	PA
PREP2	Territory- PSindhudurga	TBR	05-05-2008	0	0	0	0	0	0	0	0

**Pending Request**

Drag a column to this area to group by it. Search:

Date	Type	Details	Status	Status Date	Pending With	Delete
------	------	---------	--------	-------------	--------------	--------

**Calendar**

July-2008						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

**Message Board**

Date	Name	Dsgn
------	------	------

Page 1 of 0 (0 items)

The following summary is shown to the REP on his dash board;

- a. Last DAR Date
- b. Pending Request
- c. Month To Date figures (Current Month) for;
  - i. Chemist Calls
  - ii. Chemist call average Chemist calls
  - iv. Chemist call average
  - v. POB total for chemists and chemists

- vi. Stockist calls
- vii. No of approvals pending

In addition to the above the MR dashboard also provides notifications to the REP regarding any approvals, rejections and pending masters. Along with notifications, broadcasts if any will also be shown on the dash board.

## 4. Basic Concepts of operation

### a) Application functionality


The MPower application interface consists of various controls through which the user of the application can communicate actions to the system. Each of these controls has a different purpose in order to communicate with the MPower system.

**Basic System Requirements:** The MPower WEB application must have the following minimum requirements;

- Operation System – Windows XP
- Browser – Internet Explorer V 7.0
- Browser setting – Java Scripting must be enabled

#### ▪ Buttons

1. Buttons are used to invoke some operation on the screen. The operation that would be performed is indicated as a label on the button. For e.g., “Add” button is to add or submit a particular record.



Populate Summary 1

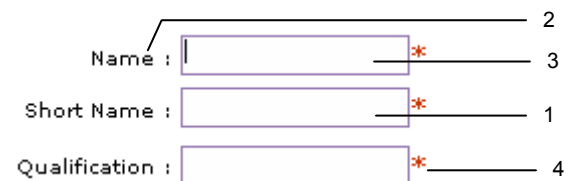
Status :

Approval Date :

Doctors	Chemist
---------	---------

#### ▪ Input Fields

1. Input fields are used to capture data. The data which can be typed into the input fields could be numeric, alphanumeric or date.
2. The type of data that can be entered is indicated from the label attached to the input field. For e.g. “Order qty” is only numeric. Characters cannot be typed into numeric columns.
3. If there are many input fields on the screen then the field in which the cursor is positioned is shown indicates current field.
4. The input fields with ‘\*’ symbol beside them is to indicate a mandatory field. I.e. the transaction cannot be saved if the field is blank.



Name :  \*


Short Name :  \*

Qualification :  \*

## ■ Selection Lists

1. Selection lists are a list of options which usually depict a business rule. The label attached to the list indicates the purpose of the list.
2. It is a list with an arrow pointing downwards. On clicking of the control, a list drops down for selection. Only one option can be selected from the list at a time.

Middle Name :

Gender :  

E- mail :

**Female**  
**Male**

## ■ Calendar selections

1. The calendar window is invoked by pressing the calendar button beside a date input field. No entry is possible in the date field except through the calendar selection.
2. The arrows at the top of the calendar window are for changing the month and year. The single arrow is for changing the month.
3. Any day in the month displayed in the calendar can be selected by clicking with the mouse. The selected date is highlighted.

State :

Date of

December 2007

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

## ■ Tabs

1. Tabs are like pages of a book. Where each page has something written on it. Similarly each tab is a window with some logically grouped fields in it. The tabs can be selected by clicking on a tab name. The highlighted tab is always the current selected tab.

Summary Doctors Chemist Stockist NFD

## ■ Multiple Selections (Check Boxes)

1. Check boxes are used in places where one or more selections are required against a fixed set of options. It is a small box beside the option to be selected. On clicking a Tick mark is shown which indicates that the option is selected.

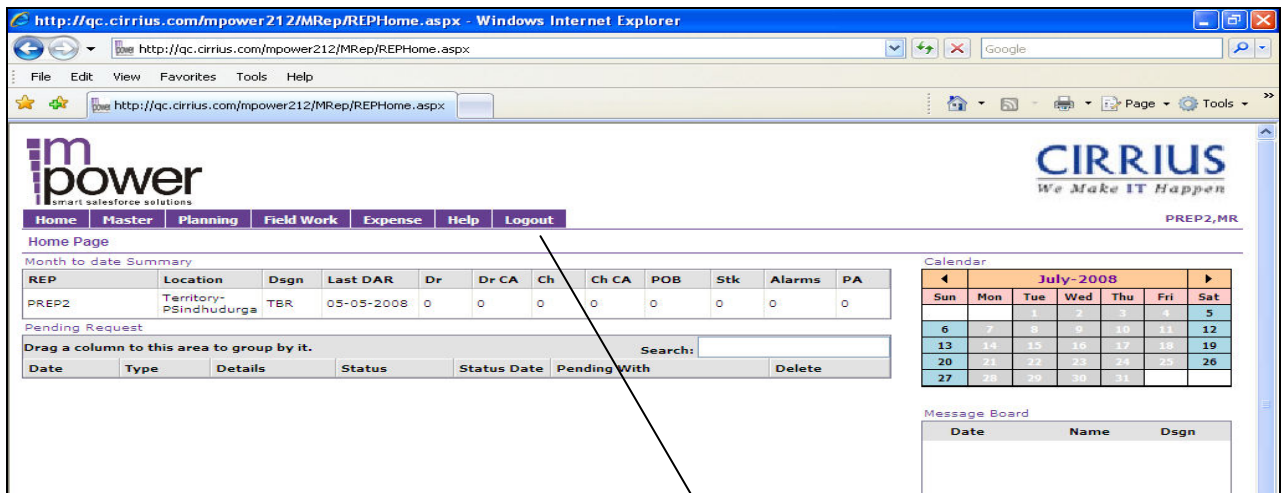
ANTIBIOTICS	<input checked="" type="checkbox"/>
LIQUID DRUGS	<input type="checkbox"/>
CAPSULE	<input checked="" type="checkbox"/>



## Exit System

### b) Logout from Application

In order to exit from the MPower application console the REP will have to use the logout control on the main screen. The application exit can happen just by clicking on the LOGOUT button on the top of the console page.



To exit

## Using the system

### a) Defining and Managing Standard Tour Plan

**Getting there:** Login -> Go to Planning menu -> Select Standard Tour Program Entry.

#### i) **Create Standard Tour Plan**

Open the Standard Tour Program screen which will initially be blank with list of week days. Press the Patch link to insert a location and press OK button. This creates the line of entry for the first day. Similarly add all the line of entries after selecting location types.

Next the parties can be selected for each day by clicking on the button against each line of entry consecutively. Finally the Standard Tour Program can be saved using the SAVE button. After saving the Standard Tour Program cannot be modified.

#### ii) **Plan for areas to be visited in the Standard Tour Plan**

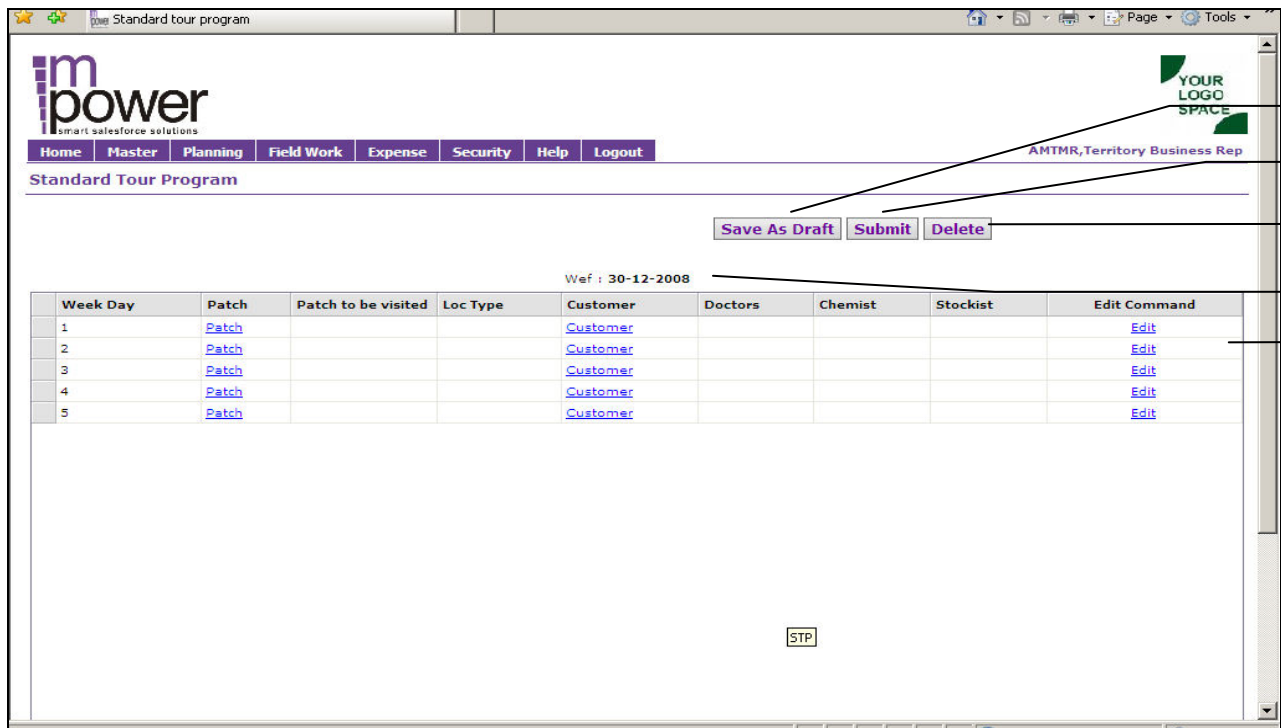
The patch column in the Standard Tour Program has a provision to select the area of work. Open the Standard Tour Program and click on the patch link against the required line of entry. Then a list of all patches attached to the REP will be shown for selection in a separate window.

One or more patches can be selected from the list and on pressing OK button in the list the names of the selected patches is shown in Standard Tour Program separated by commas. If a patch is not present in the list then it will have to be added through the patch configuration screen.

#### iii) **Configure parties to be visited in standard plan**

The Customer column in the Standard Tour Program has a provision to select the area of work. Open the Standard Tour Program using the EDIT operation and click on the Customer link against the required line of entry. Then a list of all parties attached to the REP will be shown for selection in a separate window.

One or more parties can be selected from the list and on pressing OK a summary can be seen for chemists and stockist showing the number of parties selected in tour plan under the selected patch.



Standard Tour Program

Wef : 30-12-2008

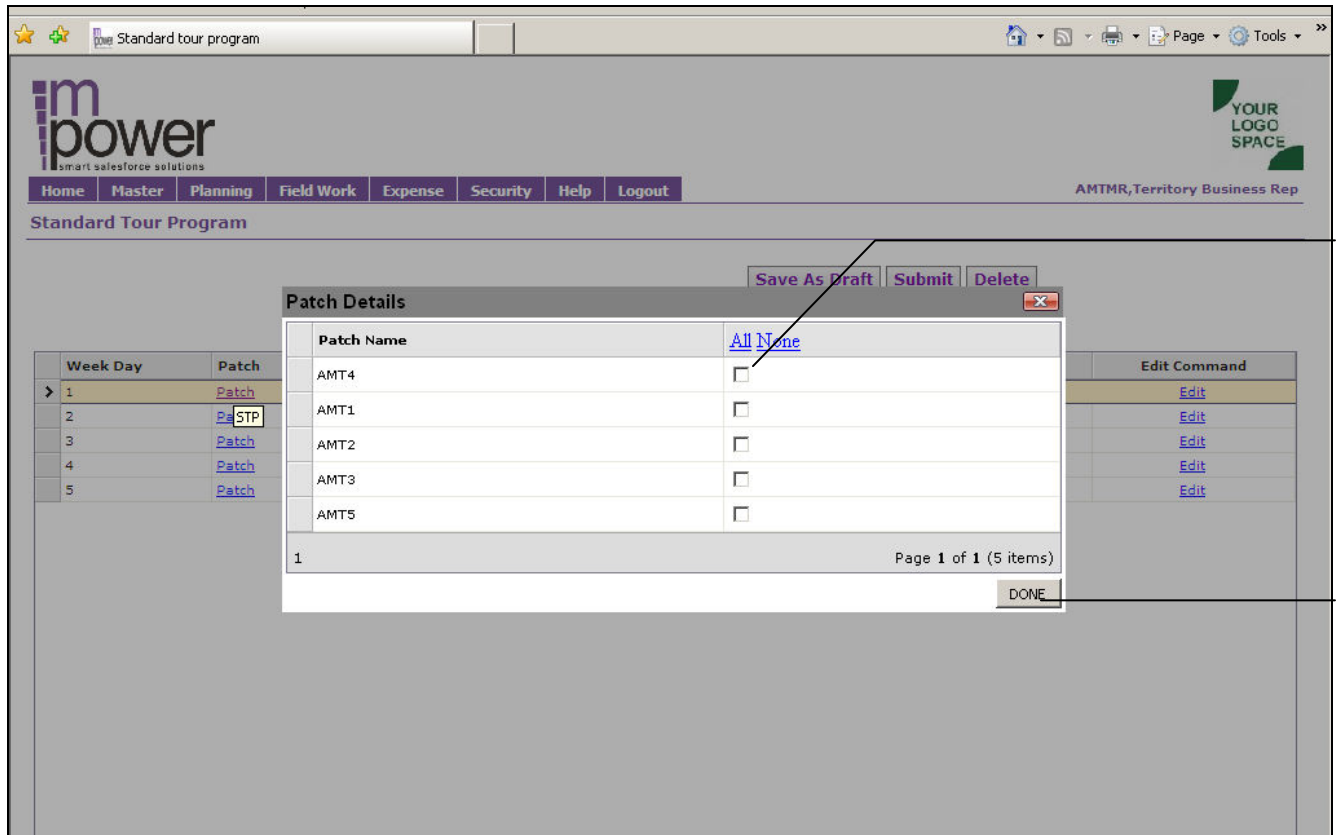
Week Day	Patch	Patch to be visited	Loc Type	Customer	Doctors	Chemist	Stockist	Edit Command
1	<a href="#">Patch</a>			<a href="#">Customer</a>				<a href="#">Edit</a>
2	<a href="#">Patch</a>			<a href="#">Customer</a>				<a href="#">Edit</a>
3	<a href="#">Patch</a>			<a href="#">Customer</a>				<a href="#">Edit</a>
4	<a href="#">Patch</a>			<a href="#">Customer</a>				<a href="#">Edit</a>
5	<a href="#">Patch</a>			<a href="#">Customer</a>				<a href="#">Edit</a>

STP

## STP

- The REP can save the STP at any point of time by clicking SAVE AS DRAFT button. Next time the REP logs in he will be able to continue from where he had saved earlier.
- To submit the STP for approval to the manager the REP will click on SUBMIT button.
- To delete the existing STP the REP can click on DELETE button.
- With effect from date is the date on which the standard tour plan is being prepared.
- Plan:
  - Week Day – Work day of any month.
  - Patch – Name of the patch which is being planned on any work day. On pressing the link a list is shown from which one or more parties can be selected.
  - Loc type – The type of area of the selected patches is to be selected, with respect to the REP's head quarter.
  - Customer --On pressing the link the customer details either Chemist or Stockiest to be visited can be selected.

## ▪ STP – Patch selection



The screenshot shows the 'Standard Tour Program' interface. A 'Patch Details' dialog box is open, displaying a list of patches for selection. The dialog has buttons for 'Save As Draft', 'Submit', and 'Delete'. The background table shows a 'Week Day' column and a 'Patch' column with links to 'Patch'.

Week Day	Patch
1	<a href="#">Patch</a>
2	<a href="#">Patch</a>
3	<a href="#">Patch</a>
4	<a href="#">Patch</a>
5	<a href="#">Patch</a>

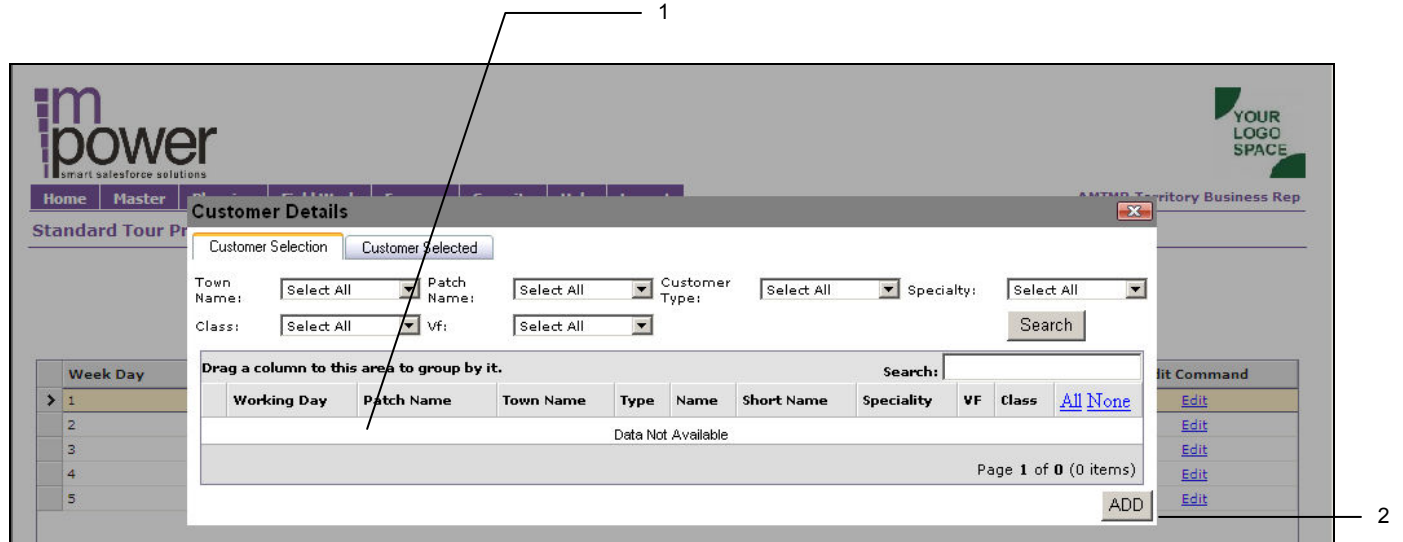
Patch Name	
AMT4	<input type="checkbox"/>
AMT1	<input type="checkbox"/>
AMT2	<input type="checkbox"/>
AMT3	<input type="checkbox"/>
AMT5	<input type="checkbox"/>

Page 1 of 1 (5 items)

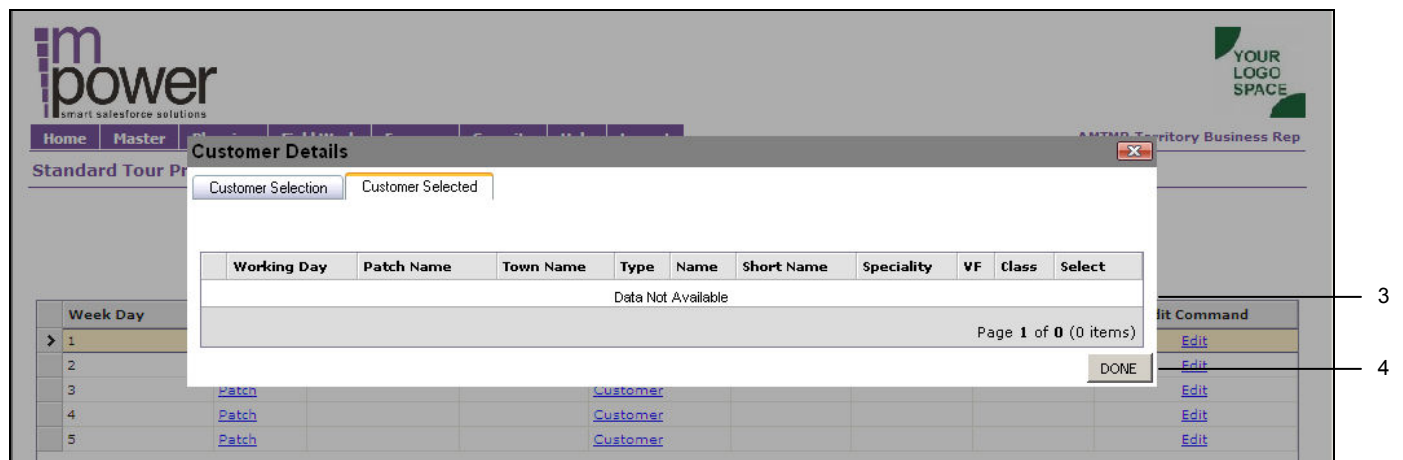
DONE

1. Patch Selection: On clicking on a patch selection link the patch selection list will be opened. Here all patches configured for the REP will be listed. The REP can select one or more patch names from the list.
2. After the selection is complete confirm the selection by pressing the DONE button.

▪ **STP – Customer selection**



1. Customer Selection: On clicking on a Customer button the Customer selection list will be opened. Here all parties configured for the selected patches will be shown. The REP can select one or more Customer names from the list.
2. After the selection is complete confirm the selection by pressing the ADD button.



3. On pressing ADD button go to Customer Selected TAB, the selected customers will be displayed.
4. Click on DONE button to confirm the selection.

## **b) Defining and Managing Monthly Tour Plan**

**Getting there:** Login -> Go to Planning menu -> Select Monthly Tour Plan Entry

### **i) Configure plan for a specific month**

A monthly plan can be created using the Monthly Tour Plan (MTP). Open the monthly tour plan screen and select the month in the header after which the days of the month are populated and plotted with the days from Standard Tour Program.

After selecting the month and year all the dates of the month are listed in the detail of the monthly tour plan. Any line of entry can be edited by using the edit link against the same. The patches and Customer can be modified by clicking the patch and Customer link against any line of entry. Save the plan after entry. The MTP cannot be modified after saving. On save the MTP is available to ABM for approval.

### **ii) Check effect of holidays or non field day on monthly plan**

The detail of the monthly tour plan has all the dates of the selected month. The dates on which leaves, general holidays, weekly holidays or non field days are configured, are shown against the specific dates.

The Act type column shows the type of day, viz. if the day is for a holiday or weekly off then the Act Type will be NWD. If the day is a non field day then ACT type will show NFW. The dates which are a holiday or NFD are not editable.

### **iii) Convert holiday or non field day into working days in monthly plan**

The detail of the monthly tour plan has all the dates of the selected month. The dates on which leaves, general holidays, weekly holidays or non field days are configured are shown in the monthly tour plan against the specific dates.

The Act type column shows the type of day. Press the EDIT button against the line of entry which needs to be modified and change the Act type as FW to convert a non field day or holiday into a working day.

### **iv) Configure joint working for some days of the monthly plan**

During add or modify operation on the monthly plan the day which involves joint working must be flagged accordingly against the day using the JW flag. However the joint working can be assigned only by the ABM.

### **v) Configure monthly plan based on the standard plan**

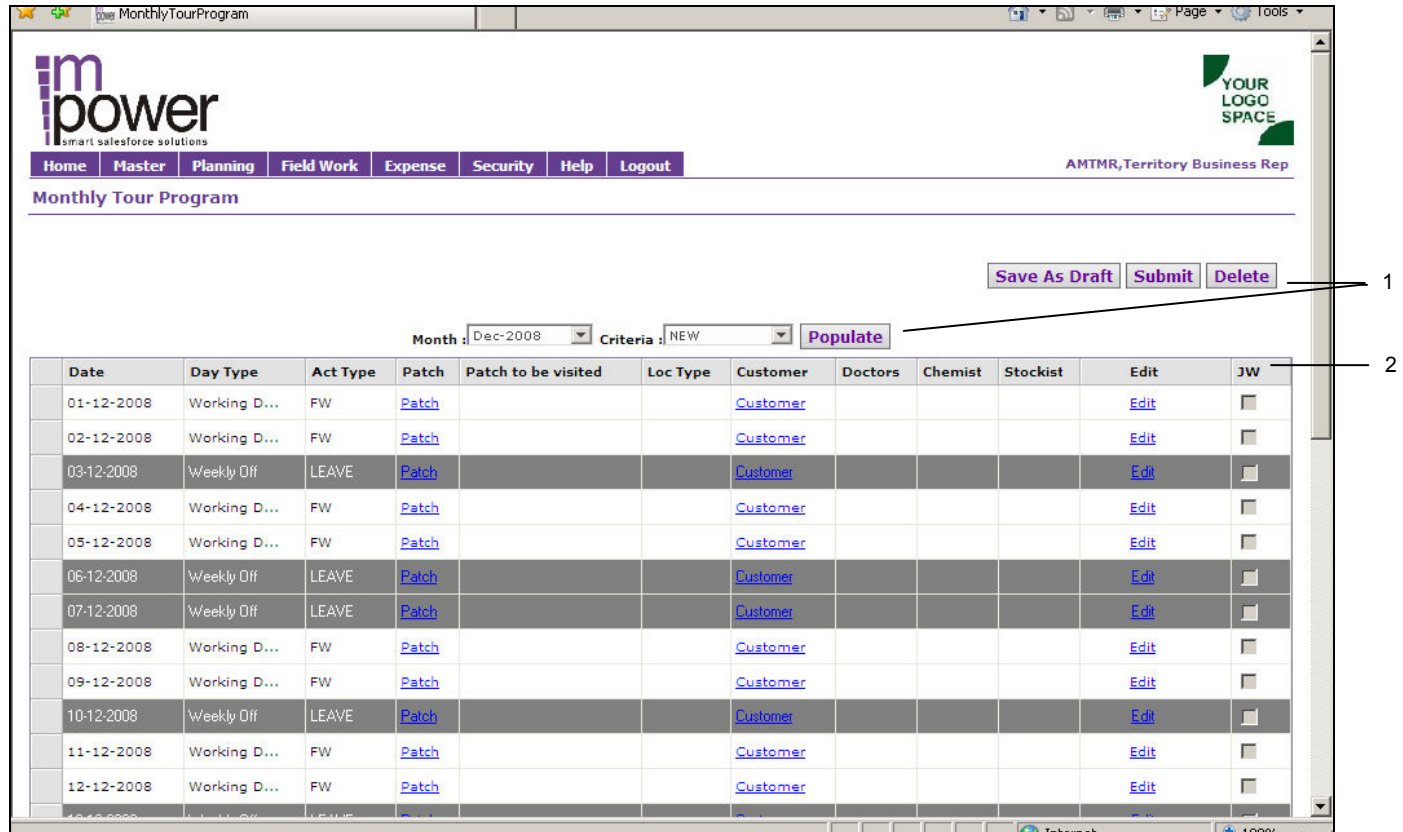
If the Monthly plan has to be made as per the standard tour plan, the user may open the monthly tour plan in ADD mode and select the "Populate STP" button. This will plot each day of the standard plan with each field day on the monthly plan. After the STP is imposed over the MTP, any further changes can be made.

If the sequence in which the STP is plotted is to be changed then after super imposing the STP over MTP the days may be reset by selecting the required work day (of STP) against the specific date in monthly tour plan.

## vi) Submit plans for approval

Once the STP and MTP is prepared the SUBMIT button has to be pressed to submit the plan for approval.

### ▪ MTP



1. MTP Header:- The MTP is opened from the dashboard for the selected REP:
  - a. Save As Draft – The REP can save the MTP at any point of time by clicking SAVE AS DRAFT button. Next time the REP logs in he will be able to continue from where he had saved earlier.
  - b. Submit – To submit the MTP for approval to the manager the REP will click on SUBMIT button.
  - c. Delete – To delete the existing MTP the REP can click on DELETE button.
  - d. Month – The month for which MTP has to be created will be selected.
  - e. Criteria – The criteria on which the MTP has to be populated i.e. New, Previous MTP or From STP.

2. MTP:

- a. Date – Date of the month which is being planned. This is populated automatically from the calendar.
- b. Day type – The type of day is for indicating if the date is a holiday, weekly off or working day.
- c. Act Type – Activity types viz. Field Work, Non field work, Non working day. This flag is to be used if a day is to be reconfigured.
- d. Patch – Shows a patch list from which the patch names can be selected.
- e. Path to be visited – Display of Patch Names which is selected.
- f. Loc Type – The selected patches against each date have to be identified if they are head quarter patches, ex-head quarter, out station, etc.
- g. Customer – Shows the Customer list from which the Customer can be selected. Customer attached to the selected patches will only be displayed.



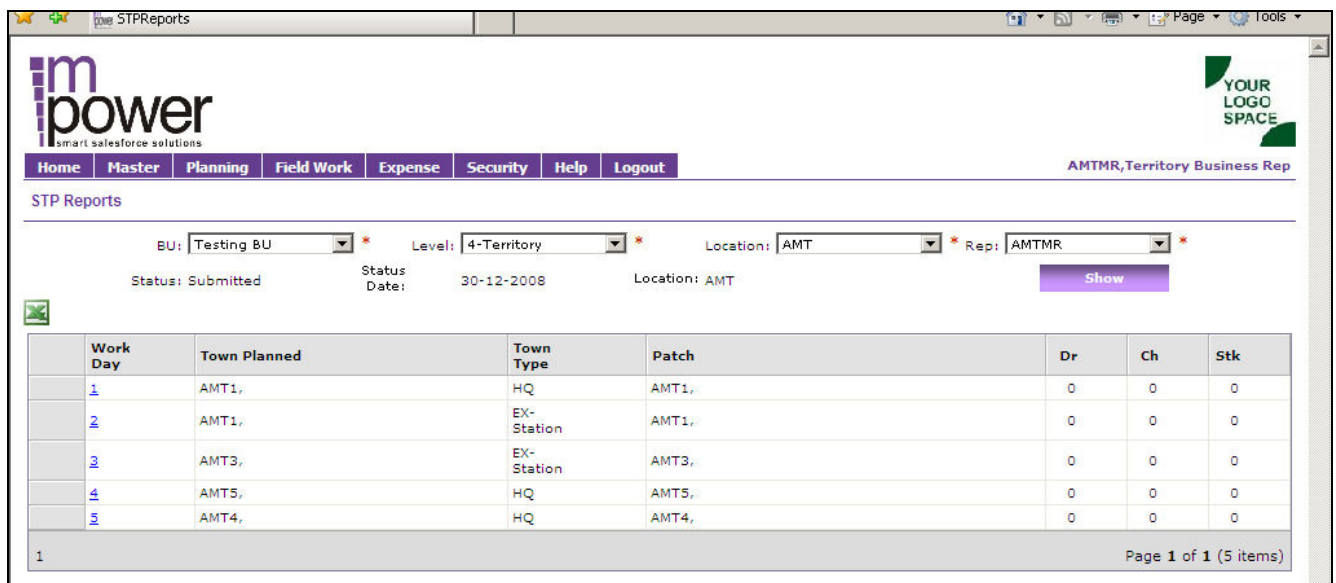
## c) View Plan for the month

### i. Standard Tour Plan Report

Parameters:-

- |                |  |
|----------------|--|
| a. BU          | – Name of the REP's Business unit is shown by default.                           |
| b. Level       | – The Geographical hierarchy level is to selected.                               |
| c. Location    | – Corresponding location of geographical hierarchy will be displayed.            |
| d. REP         | – Name of the REP who has logged in is shown by default. This is not modifiable. |
| e. Status      | – Status of the plan, i.e. approved, rejected or submitted                       |
| f. Status Date | – Display date of the status when it was approved, rejected or submitted.        |

Report:-



The screenshot shows the 'STP Reports' page in the 'm power' application. The top navigation bar includes 'Home', 'Master', 'Planning', 'Field Work', 'Expense', 'Security', 'Help', and 'Logout'. The user is logged in as 'AMTMR, Territory Business Rep'. The 'STP Reports' section has filters for BU (Testing BU), Level (4-Territory), Location (AMT), and Rep (AMTMR). The status is 'Submitted' and the status date is '30-12-2008'. A 'Show' button is present. Below the filters is a table with 8 columns: Work Day, Town Planned, Town Type, Patch, Dr, Ch, and Stk. The table contains 5 rows of data for work days 1 through 5.

Work Day	Town Planned	Town Type	Patch	Dr	Ch	Stk
1	AMT1,	HQ	AMT1,	0	0	0
2	AMT1,	EX-Station	AMT1,	0	0	0
3	AMT3,	EX-Station	AMT3,	0	0	0
4	AMT5,	HQ	AMT5,	0	0	0
5	AMT4,	HQ	AMT4,	0	0	0

Page 1 of 1 (5 items)

The standard tour plan will be shown for the selected parameters with a provision to drill down to the details for each day of the plan;

- |  |   |
|--|---|
| a. Work Day                                | - A work day of any month for which plan is defined. On selection of this link, the following details will be shown for the selected month. |
| i. Patch                                   |   |
| ii. Type i.e. doctor, chemist or stockist. |   |
| iii. Customer name.                        |   |
| iv. Specialty of the doctor.               |   |
| v. Class of the customer.                  |   |
| vi. VF of the customer.                    |   |
| vii. Focus Brand of the doctors.           |   |

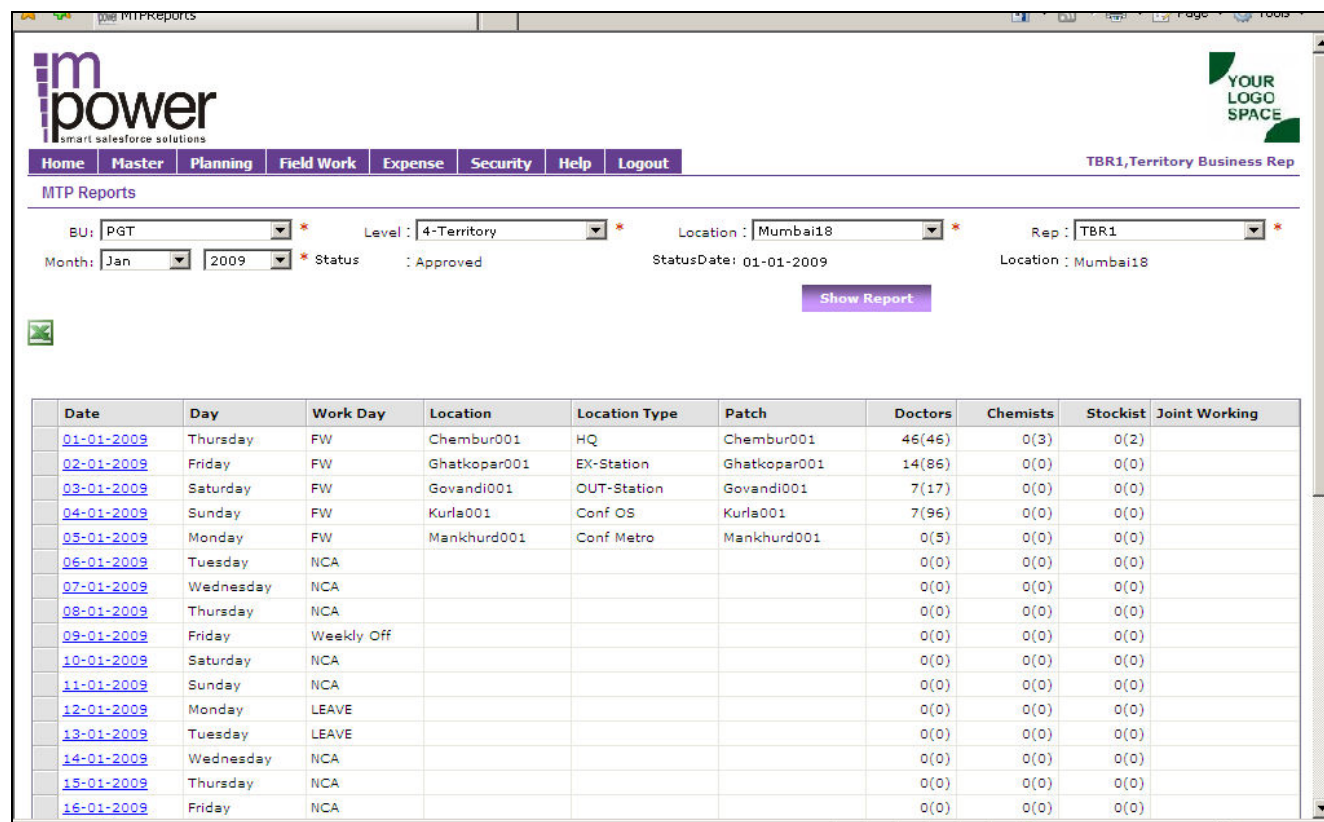
- b. Town Planned – Town to be visited on a work day.
- c. Town type – The type of town with respect to the REPs headquarter. Viz. HQ, EX-HQ, Outstation. For each workday, town planned and town type the report of parties to be met can be drilled down by clicking on the work day.
- d. Patch – The patches planned for a specific work day in the selected town.
- e. Chemist – Total number of Chemists to be met on the planned day.
- f. Stockiest – Total number of Stockiest to be met on the planned day.

## ii. Monthly Tour Plan Report

### Parameters:-

- 1. BU – Name of the REP's Business unit is shown by default.
- 2. Level – The Geographical hierarchy level is to selected.
- 3. Location – Corresponding location of geographical hierarchy will be displayed.
- 4. REP – Name of the REP who has logged in is shown by default. This is not modifiable.
- 5. Status – Status of the plan, i.e. approved, rejected or submitted
- 6. Status Date – Display date of the status when it was approved, rejected or submitted.

### Report:-



The screenshot shows the 'MTP Reports' interface in the m power system. The top navigation bar includes links for Home, Master, Planning, Field Work, Expense, Security, Help, and Logout. The user is logged in as 'TBR1, Territory Business Rep'. The report parameters are set to BU: PGT, Level: 4-Territory, Location: Mumbai18, Rep: TBR1, Month: Jan, 2009, Status: Approved, and StatusDate: 01-01-2009. A 'Show Report' button is visible. The report table displays data for the month of January 2009, with columns for Date, Day, Work Day, Location, Location Type, Patch, Doctors, Chemists, Stockist, and Joint Working.

Date	Day	Work Day	Location	Location Type	Patch	Doctors	Chemists	Stockist	Joint Working
01-01-2009	Thursday	FW	Chembur001	HQ	Chembur001	46(46)	0(3)	0(2)	
02-01-2009	Friday	FW	Ghatkopar001	EX-Station	Ghatkopar001	14(86)	0(0)	0(0)	
03-01-2009	Saturday	FW	Govandi001	OUT-Station	Govandi001	7(17)	0(0)	0(0)	
04-01-2009	Sunday	FW	Kurla001	Conf OS	Kurla001	7(96)	0(0)	0(0)	
05-01-2009	Monday	FW	Mankhurd001	Conf Metro	Mankhurd001	0(5)	0(0)	0(0)	
06-01-2009	Tuesday	NCA				0(0)	0(0)	0(0)	
07-01-2009	Wednesday	NCA				0(0)	0(0)	0(0)	
08-01-2009	Thursday	NCA				0(0)	0(0)	0(0)	
09-01-2009	Friday	Weekly Off				0(0)	0(0)	0(0)	
10-01-2009	Saturday	NCA				0(0)	0(0)	0(0)	
11-01-2009	Sunday	NCA				0(0)	0(0)	0(0)	
12-01-2009	Monday	LEAVE				0(0)	0(0)	0(0)	
13-01-2009	Tuesday	LEAVE				0(0)	0(0)	0(0)	
14-01-2009	Wednesday	NCA				0(0)	0(0)	0(0)	
15-01-2009	Thursday	NCA				0(0)	0(0)	0(0)	
16-01-2009	Friday	NCA				0(0)	0(0)	0(0)	

The plan for any selected month can be displayed and printed if required. The monthly tour plan will be shown for the selected parameters with a provision to drill down to the details for each day of the plan;

- |                  |   |
|------------------|---|
| a. Date          | – A date of the month for which plan has been defined.                                    |
| b. Day           | – Day of the week for each date of the month.   |
| c. Work day      | – The work day as per the standard tour plan.   |
| d. Location      | – Name of the town planned for visit for each date on the month.                          |
| e. Location type | – Type of the town as defined in the standard tour plan. Viz. HQ, Ex-HQ, Outstation, etc. |
| f. Patch         | – Name of the patch planned in the selected town and date.                                |
| g. Chemists      | – Total number of chemists to be met in the selected town, patch and on specific date.    |
| h. Chemists      | – Total number of chemists to be met in the selected town, patch and on specific date.    |
| i. Joint Working | – Name of the person with whom joint work would be done on the given date.                |

## 2. Field Work Management

### a) Record daily activity report

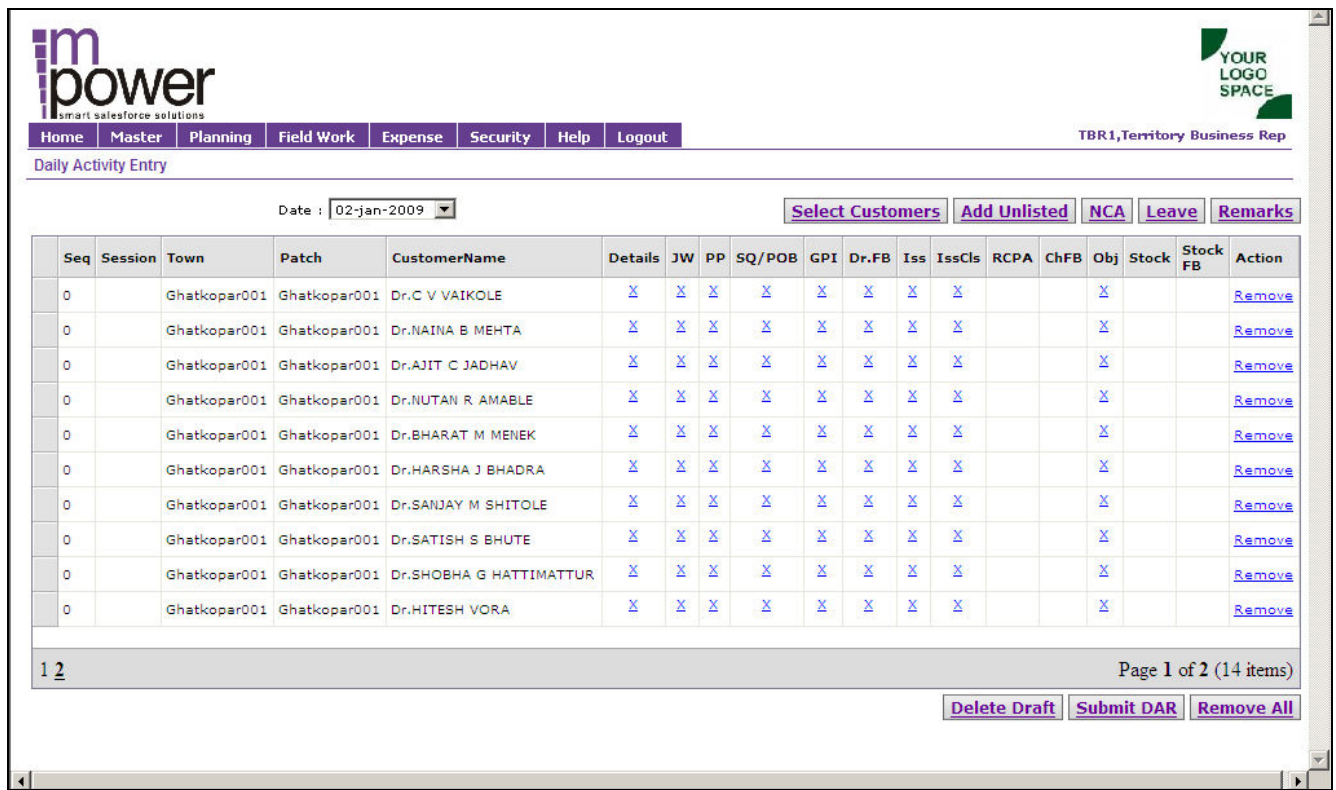
#### i. Preparing for field work entry based on plan

**Getting there:** Login -> Select Field Work menu option -> Select DCR Entry Option

The Daily Activity Report Screen initially shows only a header containing the DCR date and activity type. If a tour plan for the month is created the customers selected in the tour plan for that date will be displayed automatically. If no tour plan has been defined then the tabular will not be shown. The REP can select the parties visited from the tour plan for the DAR date. After selection is complete the REP can press the CONTINUE button to move forward.

In case tour plan is not available the Customer and patch selection can be done manually from the summary screen. The REP can click on SELECT CUSTOMER screen to navigate.

#### ▪ DAR – Plan



**m power** smart salesforce solutions

Home Master Planning Field Work Expense Security Help Logout

TBR1, Territory Business Rep

YOUR LOGO SPACE

Daily Activity Entry

Date : 02-jan-2009

Select Customers Add Unlisted NCA Leave Remarks

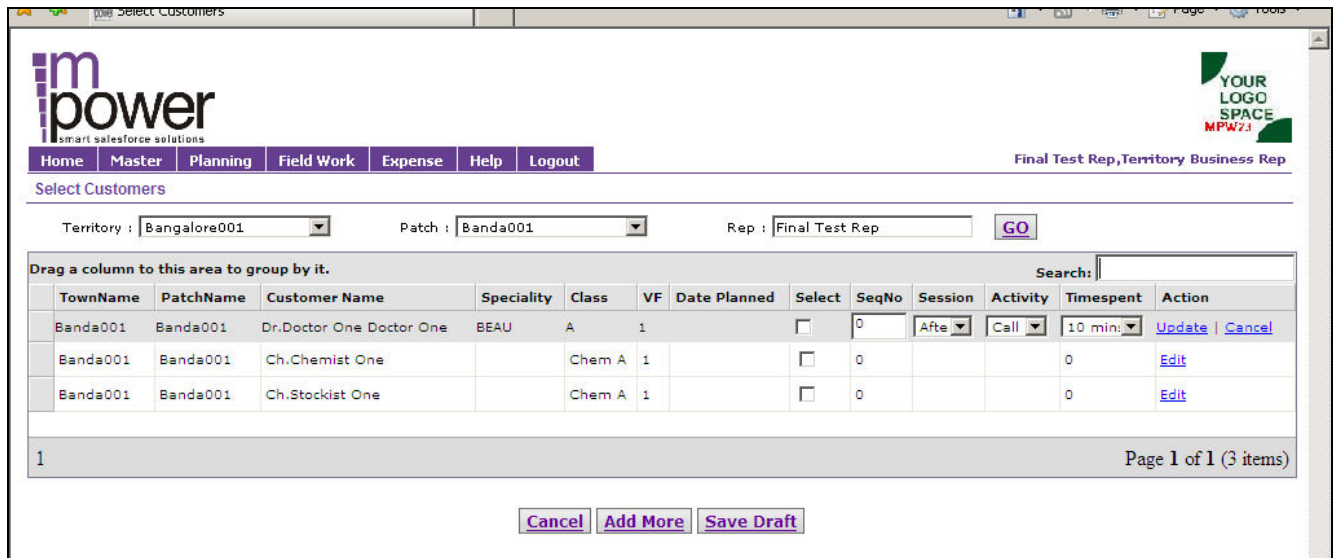
Seq	Session	Town	Patch	CustomerName	Details	JW	PP	SQ/POB	GPI	Dr.FB	Iss	IssCls	RCPA	ChFB	Obj	Stock	Stock FB	Action
0		Ghatkopar001	Ghatkopar001	Dr.C V VAIKOLE	X	X	X	X	X	X	X	X			X			Remove
0		Ghatkopar001	Ghatkopar001	Dr.NAINA B MEHTA	X	X	X	X	X	X	X	X			X			Remove
0		Ghatkopar001	Ghatkopar001	Dr.AJIT C JADHAV	X	X	X	X	X	X	X	X			X			Remove
0		Ghatkopar001	Ghatkopar001	Dr.NUTAN R AMABLE	X	X	X	X	X	X	X	X			X			Remove
0		Ghatkopar001	Ghatkopar001	Dr.BHARAT M MENEK	X	X	X	X	X	X	X	X			X			Remove
0		Ghatkopar001	Ghatkopar001	Dr.HARSHA J BHADRA	X	X	X	X	X	X	X	X			X			Remove
0		Ghatkopar001	Ghatkopar001	Dr.SANJAY M SHITOLE	X	X	X	X	X	X	X	X			X			Remove
0		Ghatkopar001	Ghatkopar001	Dr.SATISH S BHUTE	X	X	X	X	X	X	X	X			X			Remove
0		Ghatkopar001	Ghatkopar001	Dr.SHOBHA G HATTIMATTUR	X	X	X	X	X	X	X	X			X			Remove
0		Ghatkopar001	Ghatkopar001	Dr.HITESH VORA	X	X	X	X	X	X	X	X			X			Remove

1 2

Page 1 of 2 (14 items)

Delete Draft Submit DAR Remove All

1. DCR header: On opening the DCR entry screen the system shows the last date for which DCR can be entered and if a tour plan is available for that month then it is listed below the button. If there is no tour plan the system allows moving forward and manually preparing the DAR.
  - a. Date – DAR date. The date must be selected. The DAR date which will be provided for selection in the list will be restricted to the date after the last DCR date.
  - b. Select Customers – In case the monthly plan is not created, on clicking Select Customer system allows to add new customers.
  - c. Add Unlisted – To add unlisted customers user will click Add Listed.
  - d. NCA – To add a Non Call Activity user will click on NCA.
  - e. Leave – To add a Leave user will click on Leave.
  - f. Remarks – To add remarks user will click on Remarks.
  - g. Delete Draft – To delete the DCR entries user will click on Delete Drafts.
  - h. Submit DAR – To submit the DCR the user will click on Submit DAR. Once the user clicks on Submit DAR the user will not be able to enter DCR for that date again.
  - i. Remove all – To all the customers selected, the user will click on Remove All.



YOUR LOGO SPACE MPW7.1

Final Test Rep, Territory Business Rep

Home Master Planning Field Work Expense Help Logout

Select Customers

Territory : Bangalore001 Patch : Banda001 Rep : Final Test Rep GO

Drag a column to this area to group by it. Search:

TownName	PatchName	Customer Name	Speciality	Class	VF	Date Planned	Select	SeqNo	Session	Activity	Timespent	Action
Banda001	Banda001	Dr.Doctor One Doctor One	BEAU	A	1		<input type="checkbox"/>	0	After	Call	10 min	Update   Cancel
Banda001	Banda001	Ch.Chemist One		Chem A	1		<input type="checkbox"/>	0			0	Edit
Banda001	Banda001	Ch.Stockist One		Chem A	1		<input type="checkbox"/>	0			0	Edit

1 Page 1 of 1 (3 items)

Cancel Add More Save Draft

1. All the patches and parties selected in the plan are shown in the summary. This is a provision to add any additional registered or unregistered parties into the selected list.
  - a. Type – Listed or Unlisted Customer to be manually added to the DAR
  - b. Customer type – Doctor, Chemist or stockist
  - c. Patch – The name of the patch under which a Customer is to be added.
  - d. Customer – Name of the customer depending on the selected customer type. If the type field is LISTED then the REP can select from existing list of customer which are configured to him. If the type selected is unlisted then the name of the customer can be typed manually on name field. If unlisted name is typed then the reason field also has to be entered.
2. Summary table:
  - a. Town – Name of the selected patch from plan.
  - b. Customer type – Doctor, chemist or stockiest

- c. Customer – name of the customer. In case of Unlisted and Resident the field is enabled and the customer name can be entered.
- d. Session – time of the day.
- e. Action – Remove a line of entry if not required.

## ii. Preparing for field work entry without a tour plan

### Select places and people visited

The Daily Activity Report Summary Screen initially shows only a header containing the DAR date and the activity type. The detail shows the patches and parties to be visited as selected from the tour plan.

If there was no tour plan then the detail grid will be blank. The REP can manually select the patches and parties that he visited for the given DAR date. After selecting the Customer name and patch, press the GO button and the same will be added to the summary.

### Register unplanned activities

After selecting the places and people, refer to section “Select Places and People visited”, in the summary section, the REP can add any additional unlisted parties also.

The REP can add unlisted or resident doctors, who have not been planned, from the summary itself. This is done by selecting patch and Customer type from their respective fields. After this selection the SELECT button must be pressed to include the Customer into the summary. The name of the Customer can then be entered manually in the summary grid.

### Define sequence of visits

Open the summary of people and places visited by referring to the section “Select Places and People visited”. The list of parties listed in the summary is shown in sequence of selection. The sequence column will have to be edited in the sequence of the visits.

If the sequence has to be changed then the sequence can be changed by clicking on edit link against individual parties.

### iii. Doctor Visit

**Getting there:** Login -> Select Field Work menu option -> Select DCR Entry option

#### Selecting a doctor

Open the daily activity screen and select the doctors TAB. The summary of doctors selected from the plan and additional unplanned doctors are visible in a grid for selection. To know how this grid is prepared refer to the section “Preparing for field work entry based on plan” and “Preparing for field work entry without a tour plan”. The doctor whose activity report is to be made has to be first searched in the doctor’s grid. The name of the doctor is shown in the Doctor Name field after selecting the entry from the doctor selection grid.

#### Set visit date and time for Activity report

In the header of the daily activity report Select the activity type as FIELD DAY and the DATE is automatically set as the activity date for which the DAR is to be posted. The date cannot be manually entered.

#### Product Promotion

After following the procedure described in sections “Selecting a doctor” and “Set visit date and time”, the products which have been promoted can be selected in the PP block. The values for the columns sample quantity and order booked have to be set. The detailed or reminded have to also be flagged.

#### Register Joint Working

After following the procedure described in sections “Selecting a doctor” and “Set visit date and time”, details of the person worked with can be selected in the Joint Working block. In case the name of the person is not in the list, then select the unlisted option and type the name of the person in the field provided under the JW block.

#### Record Gift Distribution

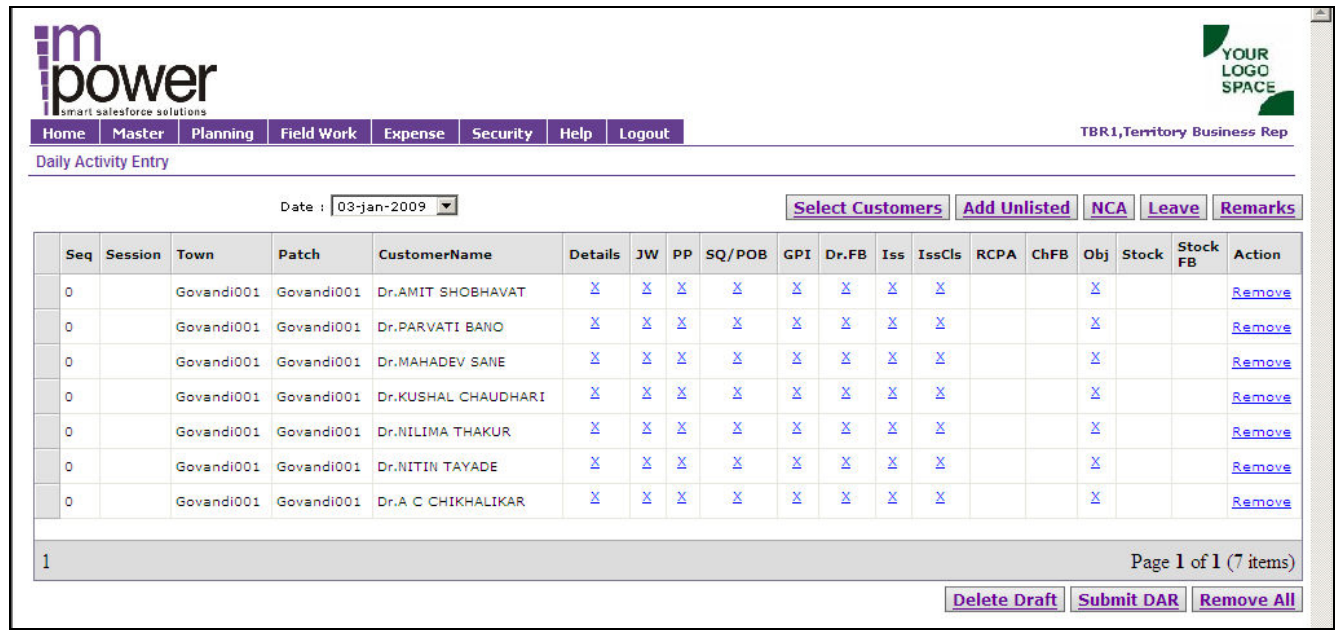
After following the procedure described in sections “Selecting a doctor” and “Set visit date and time”, the gifts and promotional items quantity distributed can be set for the gifts and promotional items in the gifts block.

#### Concluding a doctors visit

The outcome of a visit can be mentioned in the conclusion block of the daily report. After following the procedure described in sections “Selecting a doctor” and “Set visit date and time”, the visit conclusion and next visit objective has to be entered here. Any change in the doctor’s strategy can also be entered here.



## Field Day- Doctor Entry



**m power**  
smart salesforce solutions

Home Master Planning Field Work Expense Security Help Logout

TBR1, Territory Business Rep

Daily Activity Entry

Date : 03-Jan-2009

Select Customers Add Unlisted NCA Leave Remarks

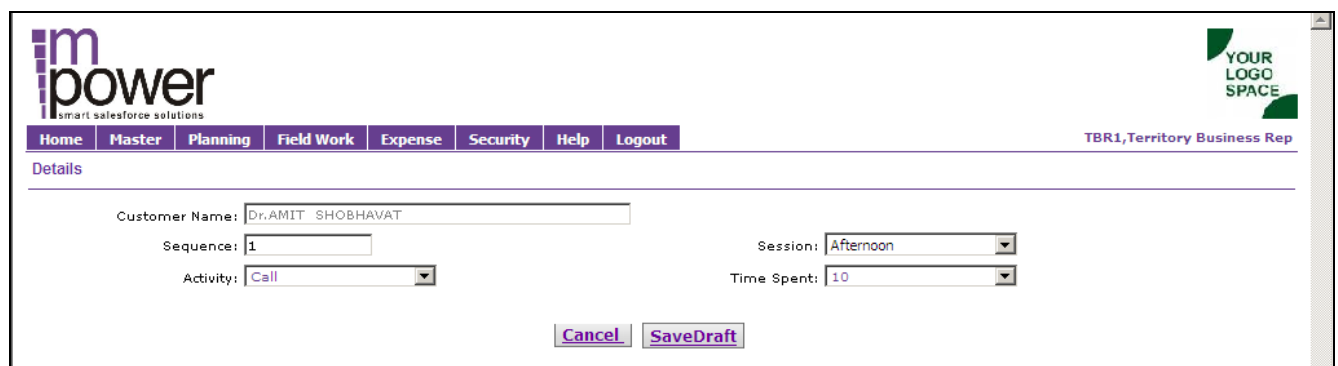
Seq	Session	Town	Patch	CustomerName	Details	JW	PP	SQ/POB	GPI	Dr.FB	Iss	IssCls	RCPA	ChFB	Obj	Stock	Stock FB	Action
0		Govandi001	Govandi001	Dr.AMIT SHOBHAVAT	X	X	X	X	X	X	X	X			X			Remove
0		Govandi001	Govandi001	Dr.PARVATI BANO	X	X	X	X	X	X	X	X			X			Remove
0		Govandi001	Govandi001	Dr.MAHADEV SANE	X	X	X	X	X	X	X	X			X			Remove
0		Govandi001	Govandi001	Dr.KUSHAL CHAUDHARI	X	X	X	X	X	X	X	X			X			Remove
0		Govandi001	Govandi001	Dr.NILIMA THAKUR	X	X	X	X	X	X	X	X			X			Remove
0		Govandi001	Govandi001	Dr.NITIN TAYADE	X	X	X	X	X	X	X	X			X			Remove
0		Govandi001	Govandi001	Dr.A C CHIKHALIKAR	X	X	X	X	X	X	X	X			X			Remove

1 Page 1 of 1 (7 items)

Delete Draft Submit DAR Remove All

### i. DETAILS:

Clicking on Details will displayed the following screen



**m power**  
smart salesforce solutions

Home Master Planning Field Work Expense Security Help Logout

TBR1, Territory Business Rep

Details

Customer Name: Dr.AMIT SHOBHAVAT

Sequence: 1

Session: Afternoon

Activity: Call

Time Spent: 10

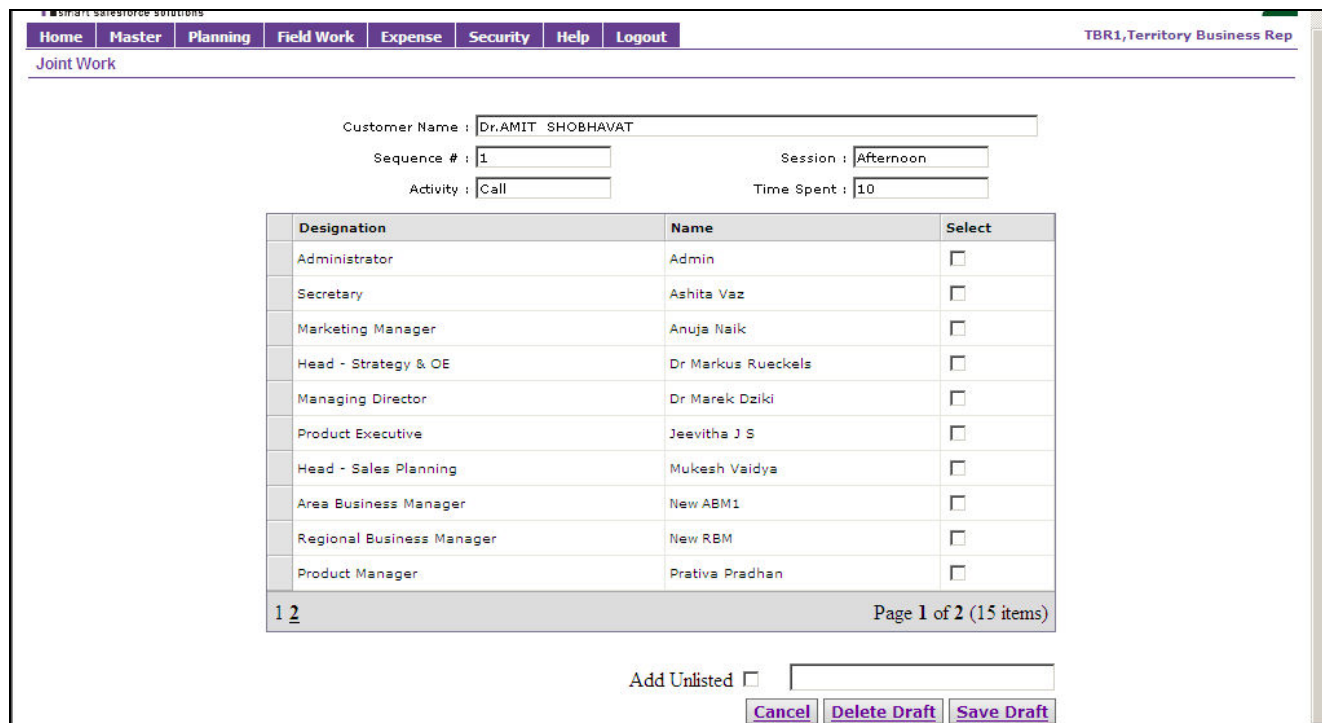
Cancel SaveDraft

1. Customer Name: The name of the customer will be displayed.
2. Sequence: The sequence no to be entered.
3. Session: Select the session from the drop down.
4. Activity: Select the activity i.e. call or campaign.
5. Time spent: Select the time spent from the drop down.
6. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.



## ii. JOINT WORK

Clicking on JW will displayed the following screen



Customer Name : Dr.AMIT SHOBHAVAT

Sequence # : 1 Session : Afternoon

Activity : Call Time Spent : 10

Designation	Name	Select
Administrator	Admin	<input type="checkbox"/>
Secretary	Ashita Vaz	<input type="checkbox"/>
Marketing Manager	Anuja Naik	<input type="checkbox"/>
Head - Strategy & OE	Dr Markus Rueckels	<input type="checkbox"/>
Managing Director	Dr Marek Dziki	<input type="checkbox"/>
Product Executive	Jeevitha J S	<input type="checkbox"/>
Head - Sales Planning	Mukesh Vaidya	<input type="checkbox"/>
Area Business Manager	New ABM1	<input type="checkbox"/>
Regional Business Manager	New RBM	<input type="checkbox"/>
Product Manager	Prativa Pradhan	<input type="checkbox"/>

1 2 Page 1 of 2 (15 items)

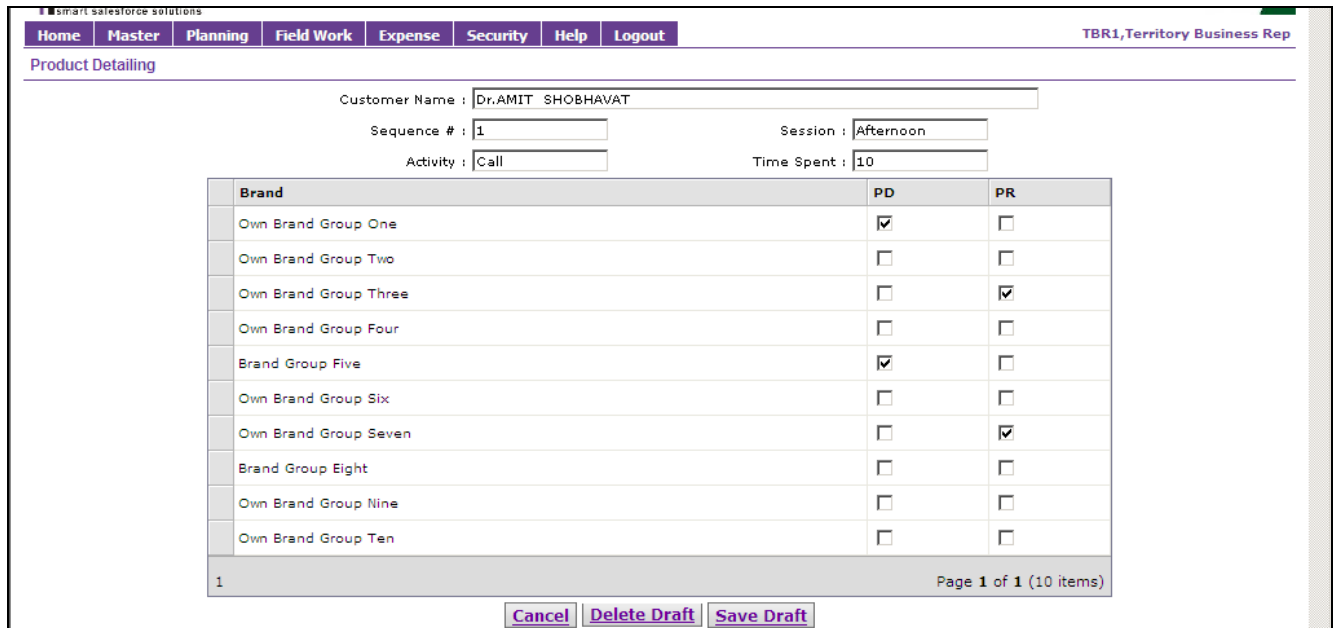
Add Unlisted ☐

[Cancel](#) [Delete Draft](#) [Save Draft](#)

1. The REP will mark in the check box to assign a manager as joint work.
2. Add unlisted – If the REP has visited the customer with an unlisted person, then he will type the name.
3. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

### iii. PP (Product Promotion)

Clicking on PP will displayed the following screen



Customer Name : Dr.AMIT SHOBHAVAT

Sequence # : 1 Session : Afternoon

Activity : Call Time Spent : 10

Brand	PD	PR
Own Brand Group One	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Own Brand Group Two	<input type="checkbox"/>	<input type="checkbox"/>
Own Brand Group Three	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Own Brand Group Four	<input type="checkbox"/>	<input type="checkbox"/>
Brand Group Five	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Own Brand Group Six	<input type="checkbox"/>	<input type="checkbox"/>
Own Brand Group Seven	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Brand Group Eight	<input type="checkbox"/>	<input type="checkbox"/>
Own Brand Group Nine	<input type="checkbox"/>	<input type="checkbox"/>
Own Brand Group Ten	<input type="checkbox"/>	<input type="checkbox"/>

1 Page 1 of 1 (10 items)

Cancel Delete Draft Save Draft

1. The REP will mark in the check box against the brands to mark PD (Product Detail) and PR (Product Reminder).
2. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

#### iv. Sample Quantity/ POB (Pay Order Booking)

Clicking on SQ/ POB will displayed the following screen

Doctor-POB

Customer Name : Dr.AMIT SHOBHAVAT

Sequence # : 1 Session : Afternoon

Activity : Call Time Spent : 10

Brand(SKU)	SQ	POB Q/V	RX Q/V	Edit Command
> SKU One R15 SR 20	5	50		<a href="#">Update</a>   <a href="#">Cancel</a>
SKU One R16 SR 21				<a href="#">Edit</a>
SKU One R17 SR 22				<a href="#">Edit</a>
SKU Two R25 SR 25				<a href="#">Edit</a>
SKU Two R26 SR 26				<a href="#">Edit</a>
SKU Two R27 SR 27				<a href="#">Edit</a>
SKU Three R30 SR 35				<a href="#">Edit</a>
SKU Three R31 SR 36				<a href="#">Edit</a>
SKU Three R32 SR 37				<a href="#">Edit</a>
SKU Four R100 SR 135				<a href="#">Edit</a>
SKU Four R150 SR 236				<a href="#">Edit</a>
SKU Four R200 SR 337				<a href="#">Edit</a>
SKU Five R100 SR 135				<a href="#">Edit</a>
SKU Five R150 SR 236				<a href="#">Edit</a>
SKU Five R200 SR 337				<a href="#">Edit</a>

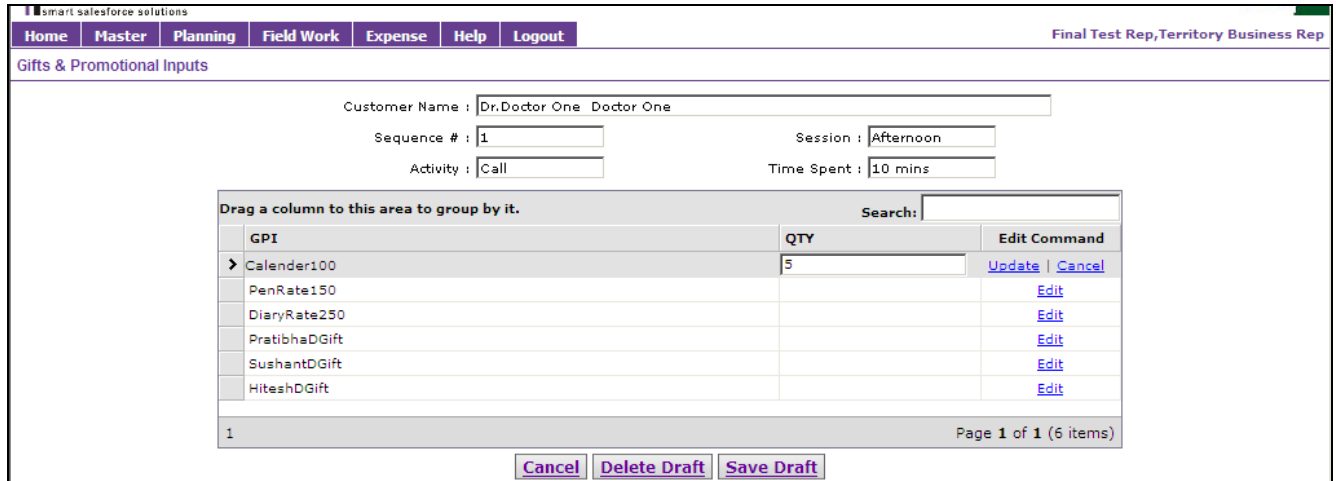
1 2 Page 1 of 2 (20 items)

[Cancel](#) [Delete](#) [Save Draft](#)

1. The REP will click on EDIT link to enter the SQ, POB Q/V and Rx Q/V. After entering the data he will click on Update link.
2. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## v. GIFT AND PROMOTIONAL INPUTS

Clicking on GPI will displayed the following screen



smart salesforce solutions

Home Master Planning Field Work Expense Help Logout Final Test Rep, Territory Business Rep

Gifts & Promotional Inputs

Customer Name : Dr. Doctor One Doctor One

Sequence # : 1 Session : Afternoon

Activity : Call Time Spent : 10 mins

Drag a column to this area to group by it. Search:

GPI	QTY	Edit Command
Calender100	5	Update Cancel
PenRate150		Edit
DiaryRate250		Edit
PratibhaDGift		Edit
SushantDGift		Edit
HiteshDGift		Edit

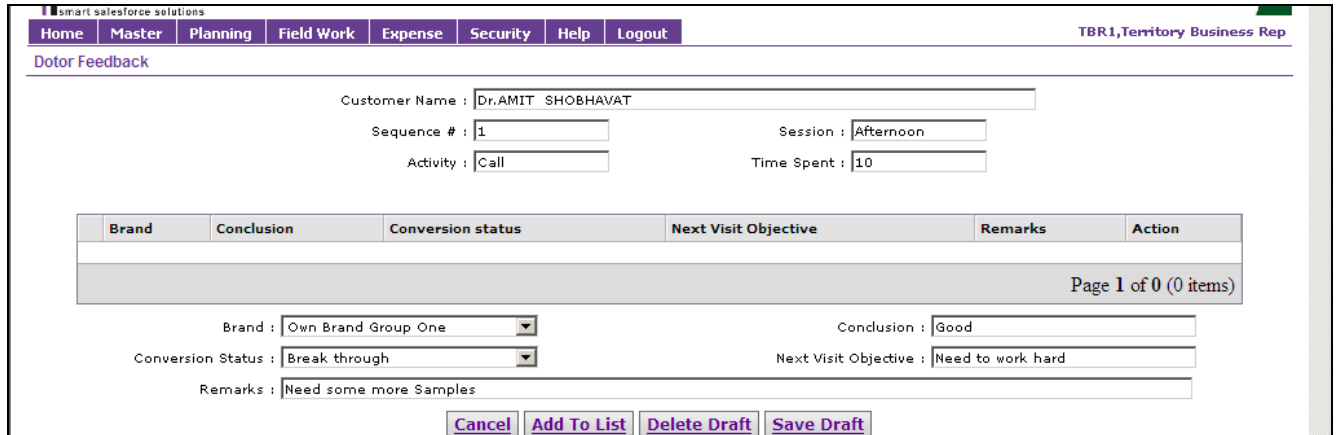
1 Page 1 of 1 (6 items)

Cancel Delete Draft Save Draft

1. The REP will click on EDIT link to enter the QTY (Quantity). After entering the data he will click on Update link.
2. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## vi. DOCTOR FEEDBACK

Clicking on **Dr. FB** will displayed the following screen



The screenshot shows the 'Doctor Feedback' form in the Smart Salesforce Solutions application. The form is titled 'Doctor Feedback' and is part of the 'TBR1, Territory Business Rep' section. It includes a navigation bar with links: Home, Master, Planning, Field Work, Expense, Security, Help, and Logout. The form fields are as follows:

- Customer Name : Dr.AMIT SHOBHAVAT
- Sequence # : 1
- Session : Afternoon
- Activity : Call
- Time Spent : 10

Below the form fields is a table with the following columns: Brand, Conclusion, Conversion status, Next Visit Objective, Remarks, and Action. The table is currently empty, and the page number is 'Page 1 of 0 (0 items)'.

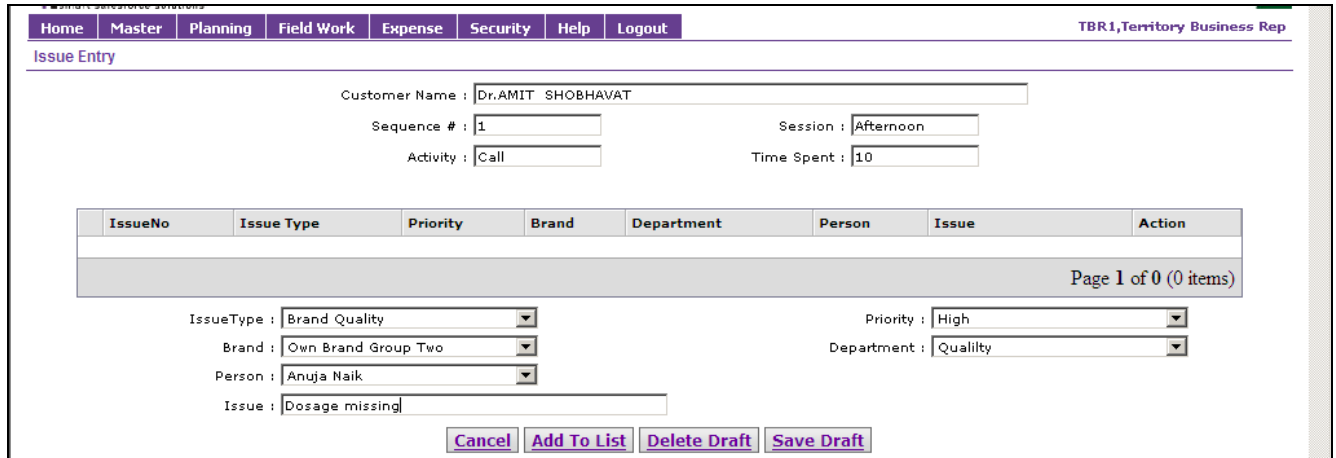
At the bottom of the form, there are four buttons: Cancel, Add To List, Delete Draft, and Save Draft. The form also includes a section for entering feedback details:

- Brand : Own Brand Group One
- Conclusion : Good
- Conversion Status : Break through
- Next Visit Objective : Need to work hard
- Remarks : Need some more Samples

1. Brand – The brand to be selected from the drop down.
2. Conclusion – The REP will type the visit conclusion. This is a free text field.
3. Conversion Status – The conversion status to be selected from the drop down.
4. Next Visit Objective – The REP will type the Next Visit Objective. This is a free text field.
5. Remarks – The will type Remarks. This is a free text.
6. Add to List – After the feedback is entered, click on ADD TO LIST to add another issue.
7. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## vii. ISSUE ENTRY

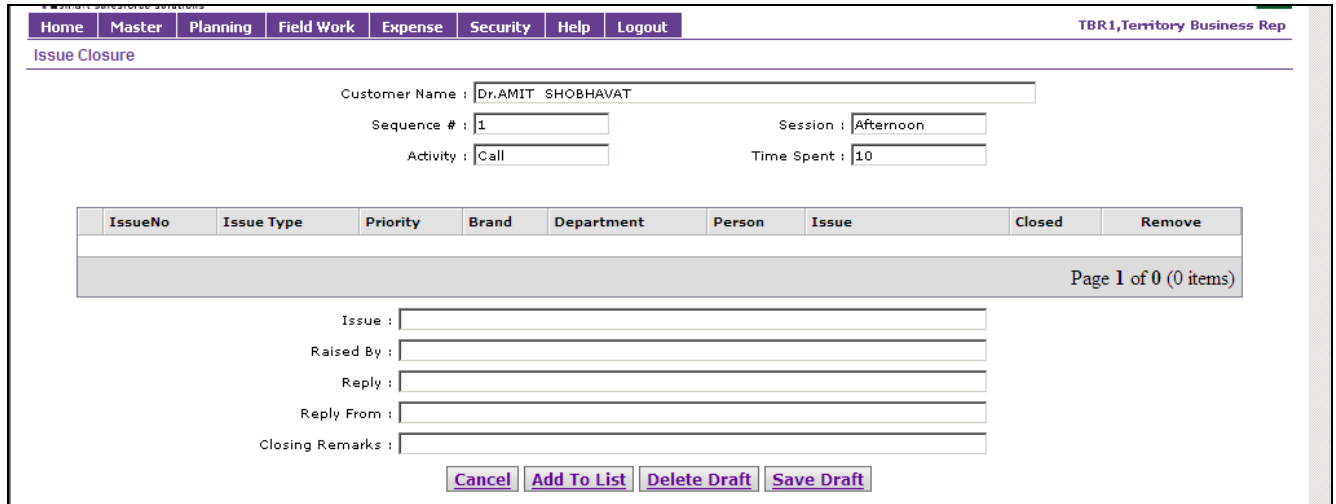
Clicking on **ISS** will displayed the following screen



1. Issue Type – The Issue type will be selected from the drop down.
2. Priority – The REP will select the priority of the issue i.e. high, medium and low..
3. Brand – If any issue is related to brand, then brand also can be selected from the drop down.
4. Department – The department to whom the issue has to be forwarded will be selected.
5. Person – The person to whom the issue will be reported to be selected from drop down.
6. Issue – The issue to be typed. This is a free text field.
7. Add to List – After the feedback is entered, click on ADD TO LIST to add another issue.
8. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## viii. ISSUE CLOSURE

Clicking on **ISSCLS** will displayed the following screen



Home Master Planning Field Work Expense Security Help Logout TBR1, Territory Business Rep

Issue Closure

Customer Name : Dr.AMIT SHOBHAVAT

Sequence # : 1 Session : Afternoon

Activity : Call Time Spent : 10

IssueNo	Issue Type	Priority	Brand	Department	Person	Issue	Closed	Remove
Page 1 of 0 (0 items)								

Issue :

Raised By :

Reply :

Reply From :

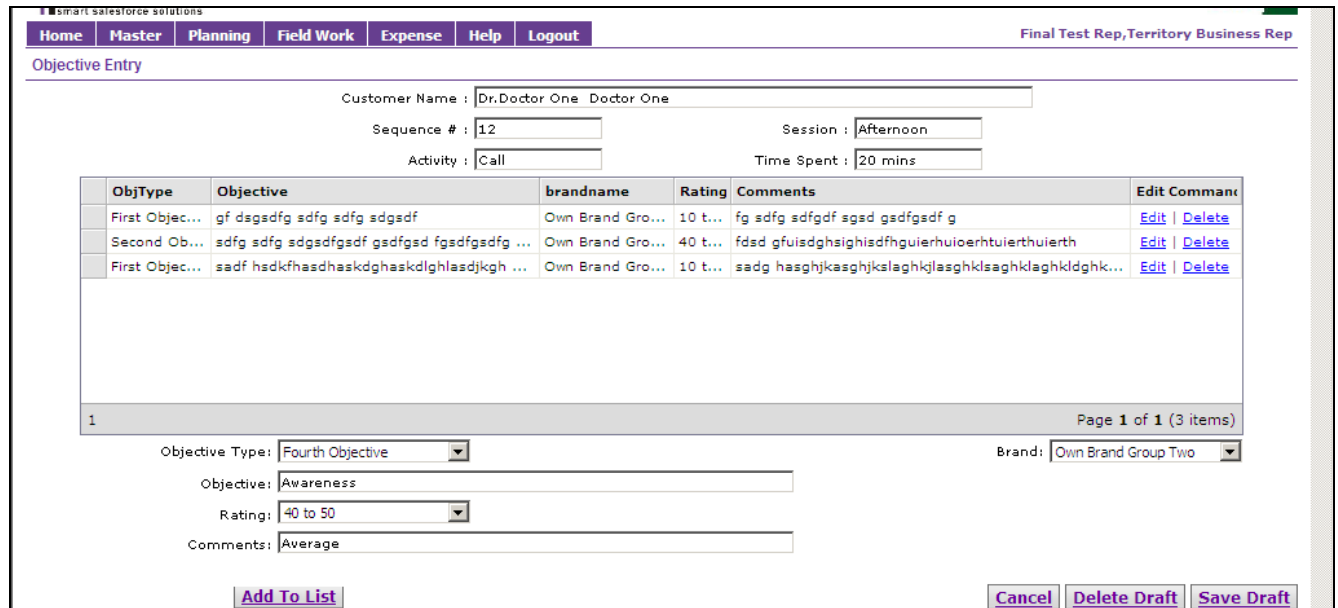
Closing Remarks :

Cancel Add To List Delete Draft Save Draft

1. Issue Type – The Issue type will be selected from the drop down.
2. Priority – The REP will select the priority of the issue i.e. high, medium and low..
3. Brand – If any issue is related to brand, then brand also can be selected from the drop down.
4. Department – The department to whom the issue has to be forwarded will be selected.
5. Person – The person to whom the issue will be reported to be selected from drop down.
6. Issue – The issue to be typed. This is a free text field.
7. Add to List – After the feedback is entered, click on ADD TO LIST to add another issue.
8. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## ix. OBJECTIVES

Clicking on **OBJ** will displayed the following screen



smart salesforce solutions

Home Master Planning Field Work Expense Help Logout Final Test Rep, Territory Business Rep

Objective Entry

Customer Name : Dr. Doctor One Doctor One

Sequence # : 12 Session : Afternoon

Activity : Call Time Spent : 20 mins

ObjType	Objective	brandname	Rating	Comments	Edit Command
First Objec...	gf dsgsdfg sdfg sdfg sdgsdf	Own Brand Gro...	10 t...	fg sdfg sdfgdf sgad gsdfgsdf g	<a href="#">Edit</a>   <a href="#">Delete</a>
Second Ob...	sdfg sdfg sdgsdfgsdf gsdfgsd fgdsfgsdfg ...	Own Brand Gro...	40 t...	fdsd gfuisdghsighisdhguierhuioerhtuierth	<a href="#">Edit</a>   <a href="#">Delete</a>
First Objec...	sadf hsdkfhasdhaskdghaskdghlasdjkggh ...	Own Brand Gro...	10 t...	sadg hasghjkasghjkslaghkjlasghklsaghlaghkldghk...	<a href="#">Edit</a>   <a href="#">Delete</a>

1 Page 1 of 1 (3 items)

Objective Type: Fourth Objective Brand: Own Brand Group Two

Objective: Awareness

Rating: 40 to 50

Comments: Average

[Add To List](#) [Cancel](#) [Delete Draft](#) [Save Draft](#)

1. Objective Type – The Objective type to be selected from the drop down.
2. Brand – If the objective is related to brand then brand can be selected from the drop down.
3. Objective – Describe the Objective. This is a free text field.
4. Ratings – Ratings to be selected from the drop down.
5. Comments – Comments to be added. This is a free text field.
6. Add to List – After the feedback is entered, click on ADD TO LIST to add another issue.
7. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.



#### **iv. Chemist Visit**

**Getting there:** Login -> Select Field Work menu option -> Select DCR Entry option

##### **Selecting a chemist**

Open the daily activity screen and select the chemist TAB. The summary of chemists selected from the plan and additional unplanned chemists are visible in a grid for selection. To know how this grid is prepared refer to the section “Planning a days field report based on plan” and “Planning a days field report without tour plan”. The chemist whose activity report is to be made has to be first searched in the chemist’s grid. The name of the chemist is shown in the Chemist Name field after selecting the entry from the chemist selection grid.

##### **Set visit date and time**

In the header of the daily activity report Select the activity type as FIELD DAY and the DATE is automatically set as the activity date for which the DAR is to be posted. The date cannot be manually entered.

##### **Register joint work**

After following the procedure described in sections “Selecting a chemist” and “Set visit date and time”, details of the person worked with can be selected in the Joint Working block. In case the name of the person is not in the list, then select the unlisted option and type the name of the person in the field provided.

##### **Capture prescription habits**

After following the procedure described in sections “Selecting a chemist” and “Set visit date and time”, the prescription habits of doctors can be entered in the Rx habits block for the selected chemist. Select the patch and doctors whose Rx habits have to be entered. Each of the selected doctors Rx habits can be entered into the brand block, the block shows own brands and competitors brands immediately below own brands. Own brands are shown in colored columns. The PV value can be entered against both own as well as competitor brands.

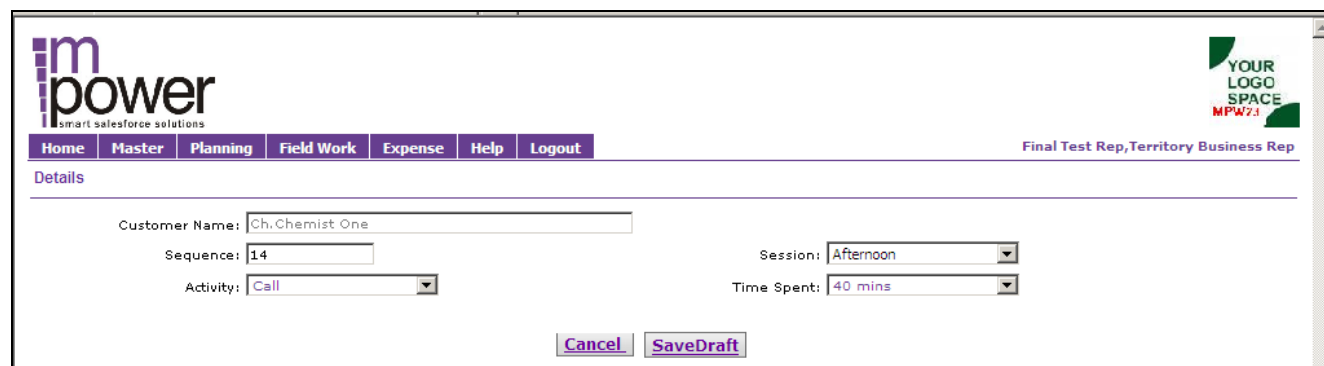
##### **Book an order**

After following the procedure described in sections “Selecting a chemist” and “Set visit date and time”, the order booked for the selected chemist can be captured in the POB block. All the products are listed in the POB block and the qty (or value as configured) can be entered against each product.

## ▪ Field Day- Chemist Entry

### i. DETAILS

Clicking on **DETAILS** will displayed the following screen



The screenshot shows the 'DETAILS' screen for a Field Day- Chemist Entry. The interface includes the m power logo and 'smart salesforce solutions' text in the top left. A navigation bar contains links: Home, Master, Planning, Field Work, Expense, Help, and Logout. In the top right, there is a placeholder for 'YOUR LOGO SPACE' with 'MPW23' below it, and the user's role 'Final Test Rep, Territory Business Rep'. The main form area is titled 'Details' and contains the following fields:

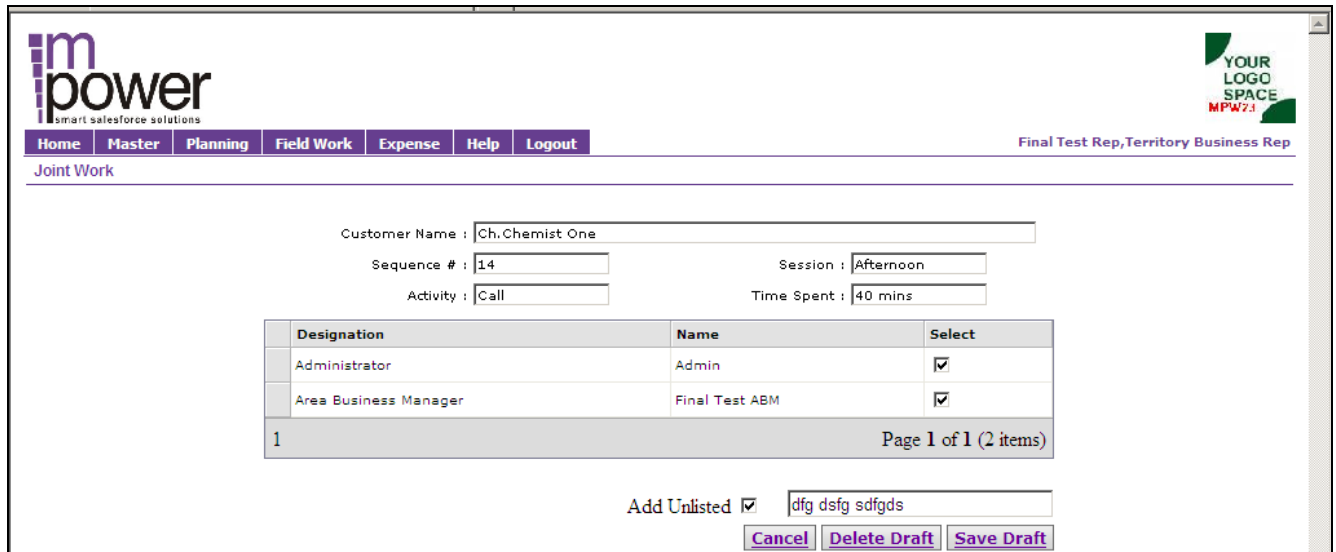
- Customer Name: A text box containing 'Ch.Chemist One'.
- Sequence: A text box containing '14'.
- Session: A dropdown menu with 'Afternoon' selected.
- Activity: A dropdown menu with 'Call' selected.
- Time Spent: A dropdown menu with '40 mins' selected.

At the bottom of the form are two buttons: 'Cancel' and 'SaveDraft'.

1. Customer Name: The name of the customer will be displayed.
2. Sequence: The sequence no to be entered.
3. Session: Select the session from the drop down.
4. Activity: Select the activity i.e. call or campaign.
5. Time spent: Select the time spent from the drop down.
6. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## ii. JOINT WORK

Clicking on JW will displayed the following screen



The screenshot shows the 'Joint Work' screen in the m power application. The header includes the m power logo, navigation tabs (Home, Master, Planning, Field Work, Expense, Help, Logout), and a user profile (Final Test Rep, Territory Business Rep). The main form contains fields for Customer Name (Ch.Chemist One), Sequence # (14), Session (Afternoon), Activity (Call), and Time Spent (40 mins). Below these fields is a table with two rows: 'Administrator' (Admin) and 'Area Business Manager' (Final Test ABM), both with checked 'Select' boxes. The table is on page 1 of 1 (2 items). At the bottom, there is an 'Add Unlisted' checkbox (checked) with a text input field containing 'dfg dsfg sdfgds', and three buttons: 'Cancel', 'Delete Draft', and 'Save Draft'.

Designation	Name	Select
Administrator	Admin	<input checked="" type="checkbox"/>
Area Business Manager	Final Test ABM	<input checked="" type="checkbox"/>

1 Page 1 of 1 (2 items)

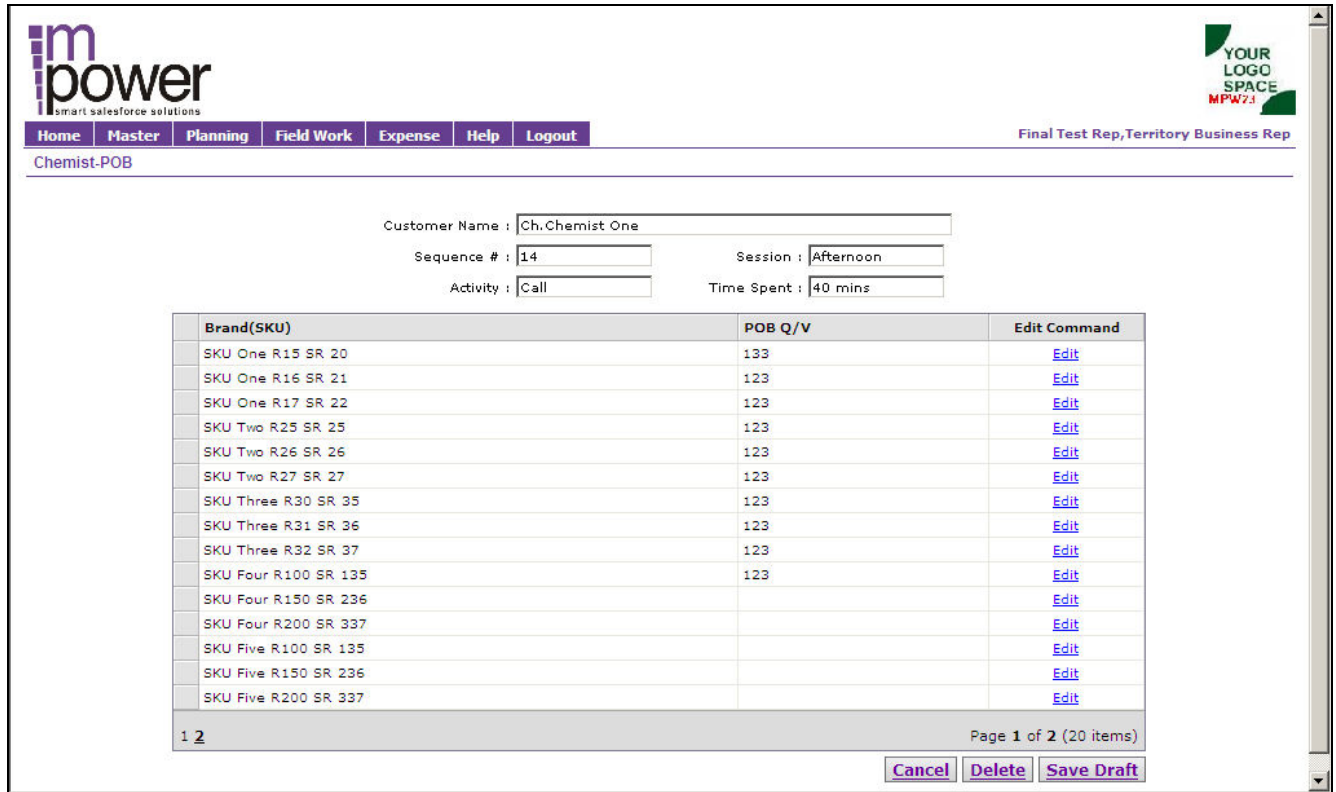
Add Unlisted ☒ dfg dsfg sdfgds

[Cancel](#) [Delete Draft](#) [Save Draft](#)

1. The REP will mark in the check box to assign a manager as joint work.
2. Add unlisted – If the REP has visited the customer with an unlisted person, then he will type the name.
3. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

### iii. Sample Quantity/ POB (Sample Quantity/ Pay Order Booking)

Clicking on SQ/ POB will displayed the following screen



The screenshot shows the 'Chemist-POB' screen in the m power application. The header includes the m power logo, navigation tabs (Home, Master, Planning, Field Work, Expense, Help, Logout), and a user profile section with 'Final Test Rep, Territory Business Rep' and a 'YOUR LOGO SPACE' placeholder.

Form fields include:

- Customer Name : Ch.Chemist One
- Sequence # : 14
- Session : Afternoon
- Activity : Call
- Time Spent : 40 mins

A table displays the following data:

Brand(SKU)	POB Q/V	Edit Command
SKU One R15 SR 20	133	<a href="#">Edit</a>
SKU One R16 SR 21	123	<a href="#">Edit</a>
SKU One R17 SR 22	123	<a href="#">Edit</a>
SKU Two R25 SR 25	123	<a href="#">Edit</a>
SKU Two R26 SR 26	123	<a href="#">Edit</a>
SKU Two R27 SR 27	123	<a href="#">Edit</a>
SKU Three R30 SR 35	123	<a href="#">Edit</a>
SKU Three R31 SR 36	123	<a href="#">Edit</a>
SKU Three R32 SR 37	123	<a href="#">Edit</a>
SKU Four R100 SR 135	123	<a href="#">Edit</a>
SKU Four R150 SR 236		<a href="#">Edit</a>
SKU Four R200 SR 337		<a href="#">Edit</a>
SKU Five R100 SR 135		<a href="#">Edit</a>
SKU Five R150 SR 236		<a href="#">Edit</a>
SKU Five R200 SR 337		<a href="#">Edit</a>

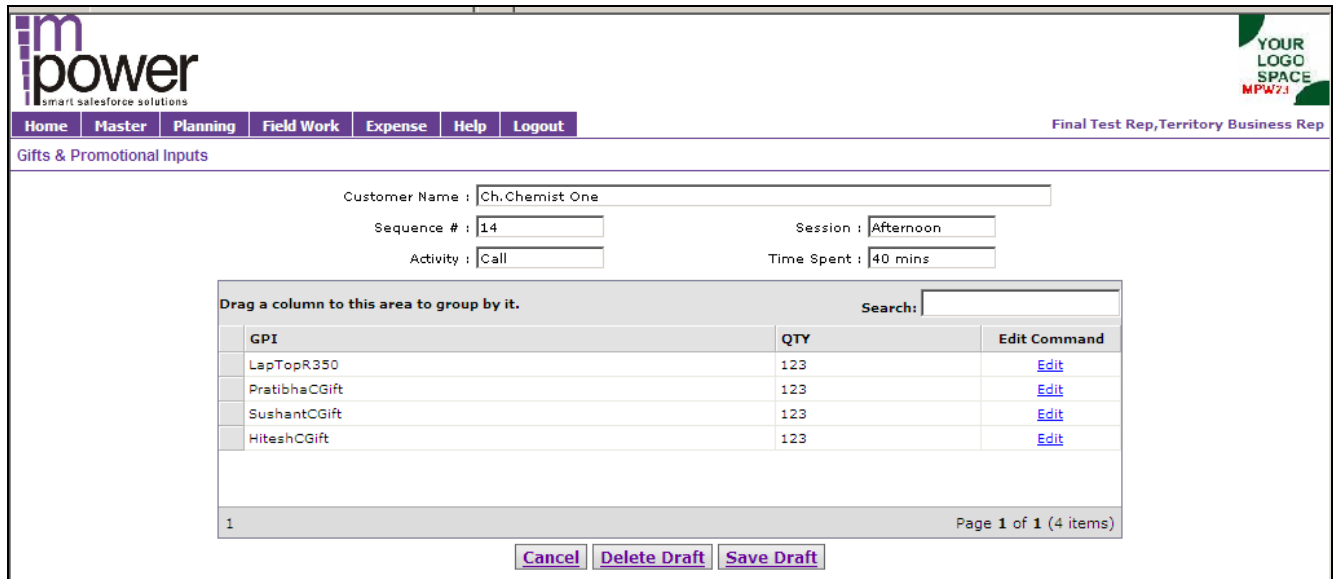
Page 1 of 2 (20 items)

Buttons: [Cancel](#) [Delete](#) [Save Draft](#)

1. The REP will click on EDIT link to enter the SQ, POB Q/V and Rx Q/V. After entering the data he will click on Update link.
2. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

#### iv. GIFT AND PROMOTIONAL INPUTS

Clicking on GPI will displayed the following screen



Customer Name :

Sequence # :  Session :

Activity :  Time Spent :

Drag a column to this area to group by it. Search:

GPI	QTY	Edit Command
LapTopR350	123	<a href="#">Edit</a>
PratibhaCGift	123	<a href="#">Edit</a>
SushantCGift	123	<a href="#">Edit</a>
HiteshCGift	123	<a href="#">Edit</a>

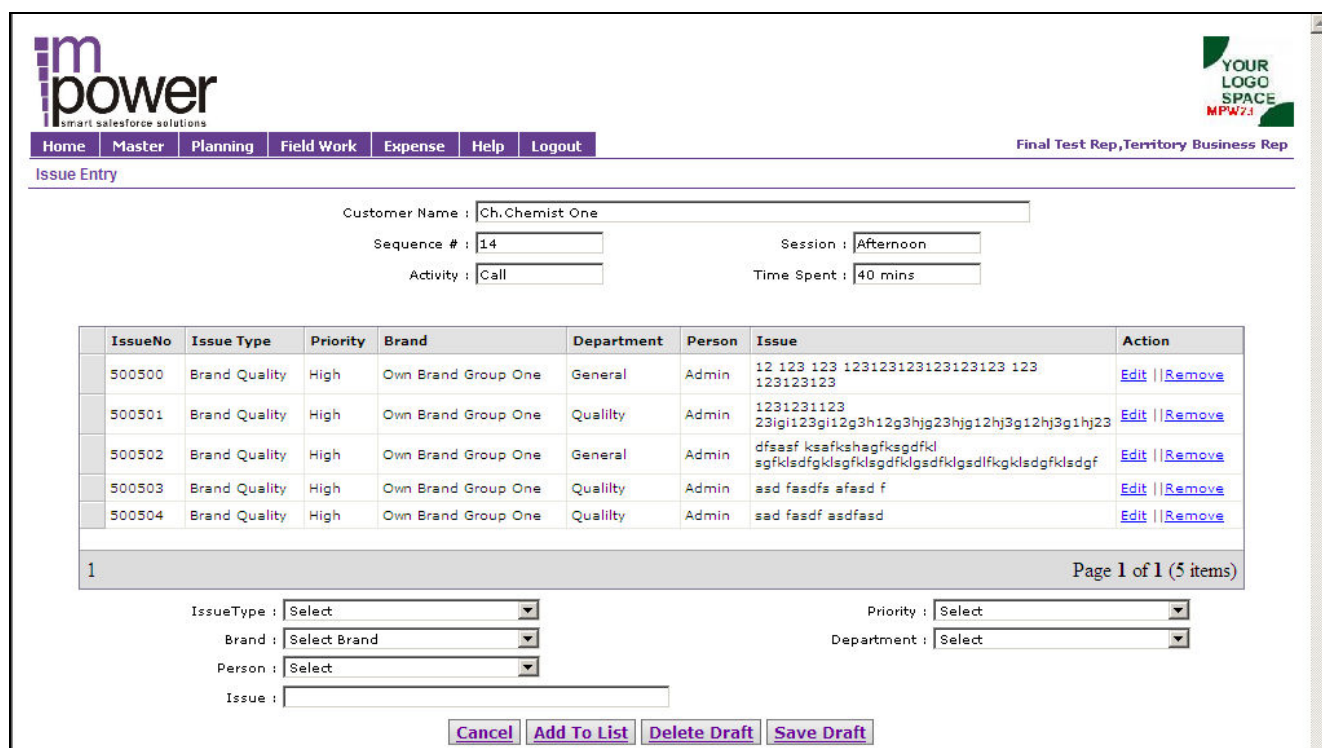
1 Page 1 of 1 (4 items)

[Cancel](#) [Delete Draft](#) [Save Draft](#)

1. The REP will click on EDIT link to enter the QTY (Quantity). After entering the data he will click on Update link.
2. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## v. ISSUE ENTRY

Clicking on ISS will displayed the following screen



The screenshot shows the 'Issue Entry' screen in the m power application. At the top, there is a navigation bar with links: Home, Master, Planning, Field Work, Expense, Help, and Logout. The user is logged in as 'Final Test Rep, Territory Business Rep'. The main form contains the following fields:

- Customer Name: Ch.Chemist One
- Sequence #: 14
- Session: Afternoon
- Activity: Call
- Time Spent: 40 mins

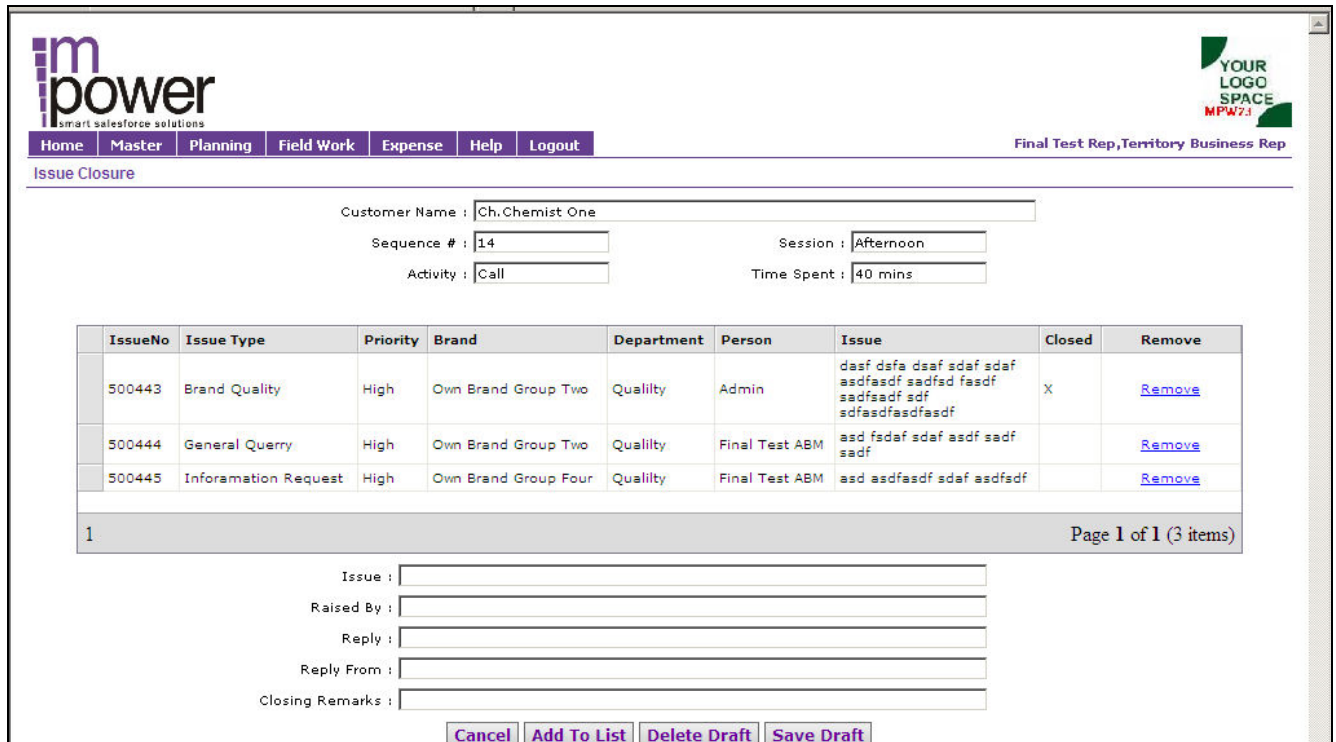
Below these fields is a table with 8 columns: IssueNo, Issue Type, Priority, Brand, Department, Person, Issue, and Action. The table contains 5 rows of data, all with 'Brand Quality' as the issue type and 'High' as the priority. The 'Issue' column contains various placeholder text like '12 123 123 123123123123123 123' and '1231231123 231gi123gi12g3h12g3hjg23hjg12hj3g12hj3g1hj23'.

At the bottom of the screen, there are several dropdown menus for filtering: IssueType (Select), Priority (Select), Brand (Select Brand), Department (Select), and Person (Select). There is also a text field for 'Issue'. At the very bottom, there are four buttons: Cancel, Add To List, Delete Draft, and Save Draft.

1. Issue Type – The Issue type will be selected from the drop down.
2. Priority – The REP will select the priority of the issue i.e. high, medium and low..
3. Brand – If any issue is related to brand, then brand also can be selected from the drop down.
4. Department – The department to whom the issue has to be forwarded will be selected.
5. Person – The person to whom the issue will be reported to be selected from drop down.
6. Issue – The issue to be typed. This is a free text field.
7. Add to List – After the feedback is entered, click on ADD TO LIST to add another issue.
8. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## vi. ISSUE CLOSURE

Clicking on ISSCLS will displayed the following screen



The screenshot shows the 'Issue Closure' interface. At the top, there's a navigation bar with 'Home', 'Master', 'Planning', 'Field Work', 'Expense', 'Help', and 'Logout'. The user is logged in as 'Final Test Rep, Territory Business Rep'. The main form includes fields for 'Customer Name' (Ch.Chemist One), 'Sequence #' (14), 'Session' (Afternoon), 'Activity' (Call), and 'Time Spent' (40 mins). Below these is a table with 9 columns: IssueNo, Issue Type, Priority, Brand, Department, Person, Issue, Closed, and Remove. The table contains 3 rows of data. At the bottom, there are input fields for 'Issue', 'Raised By', 'Reply', 'Reply From', and 'Closing Remarks', followed by buttons for 'Cancel', 'Add To List', 'Delete Draft', and 'Save Draft'.

IssueNo	Issue Type	Priority	Brand	Department	Person	Issue	Closed	Remove
500443	Brand Quality	High	Own Brand Group Two	Quality	Admin	dasf dsfa dsaf sdf sdf asdfsadf sadsf fadsf sadsadf sdf sdfsadfadsf	X	<a href="#">Remove</a>
500444	General Query	High	Own Brand Group Two	Quality	Final Test ABM	asd fsdaf sdf asdf sdf sadf		<a href="#">Remove</a>
500445	Information Request	High	Own Brand Group Four	Quality	Final Test ABM	asd asdfsadf sdf asdfsadf		<a href="#">Remove</a>

Page 1 of 1 (3 items)

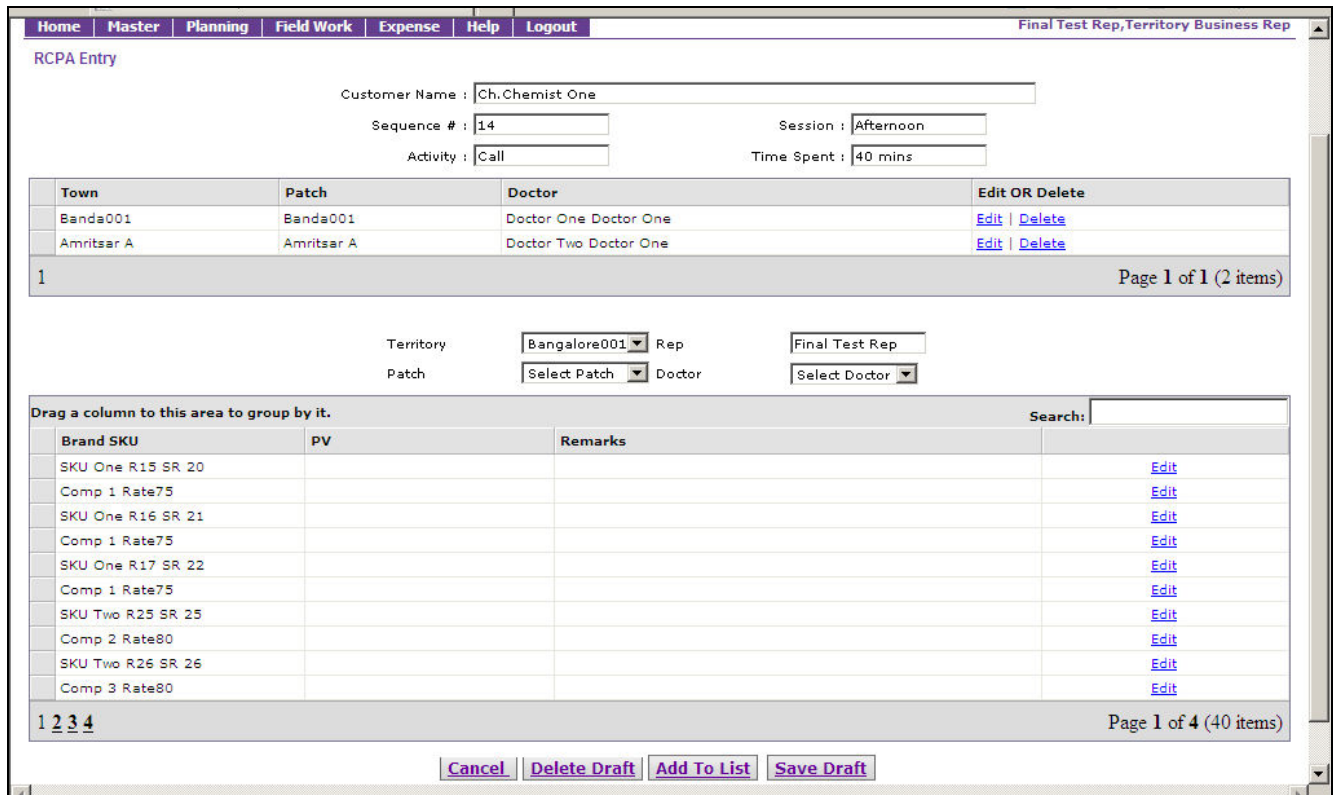
Issue :   
 Raised By :   
 Reply :   
 Reply From :   
 Closing Remarks :

[Cancel](#) [Add To List](#) [Delete Draft](#) [Save Draft](#)

1. Issue Type – The Issue type will be selected from the drop down.
2. Priority – The REP will select the priority of the issue i.e. high, medium and low..
3. Brand – If any issue is related to brand, then brand also can be selected from the drop down.
4. Department – The department to whom the issue has to be forwarded will be selected.
5. Person – The person to whom the issue will be reported to be selected from drop down.
6. Issue – The issue to be typed. This is a free text field.
7. Add to List – After the feedback is entered, click on ADD TO LIST to add another issue.
8. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## vii. RCPA (Retail Chemist Prescription Audit)

Clicking on RCPA will displayed the following screen



Home Master Planning Field Work Expense Help Logout Final Test Rep, Territory Business Rep

RCPA Entry

Customer Name : Ch.Chemist One

Sequence # : 14 Session : Afternoon

Activity : Call Time Spent : 40 mins

Town	Patch	Doctor	Edit OR Delete
Banda001	Banda001	Doctor One Doctor One	<a href="#">Edit</a>   <a href="#">Delete</a>
Amritsar A	Amritsar A	Doctor Two Doctor One	<a href="#">Edit</a>   <a href="#">Delete</a>

1 Page 1 of 1 (2 items)

Territory: Bangalore001 Rep: Final Test Rep

Patch: Select Patch Doctor: Select Doctor

Drag a column to this area to group by it. Search:

Brand SKU	PV	Remarks	
SKU One R15 SR 20			<a href="#">Edit</a>
Comp 1 Rate75			<a href="#">Edit</a>
SKU One R16 SR 21			<a href="#">Edit</a>
Comp 1 Rate75			<a href="#">Edit</a>
SKU One R17 SR 22			<a href="#">Edit</a>
Comp 1 Rate75			<a href="#">Edit</a>
SKU Two R25 SR 25			<a href="#">Edit</a>
Comp 2 Rate80			<a href="#">Edit</a>
SKU Two R26 SR 26			<a href="#">Edit</a>
Comp 3 Rate80			<a href="#">Edit</a>

1 2 3 4 Page 1 of 4 (40 items)

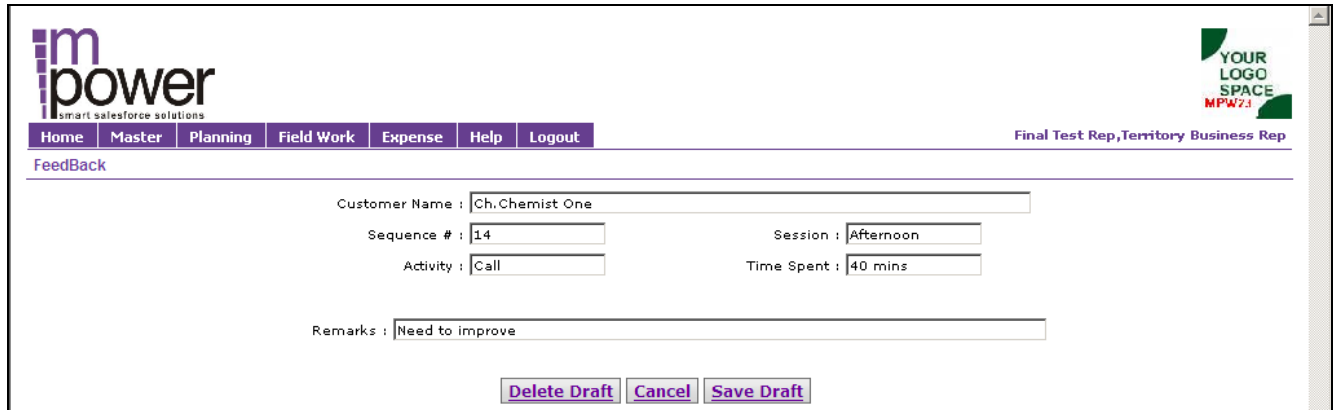
[Cancel](#) [Delete Draft](#) [Add To List](#) [Save Draft](#)

1. Territory – Territory of the doctor to be selected.
2. REP – The name of the REP will be displayed.
3. Patch – Patch where If any issue is related to brand, then brand also can be selected from the drop down.
4. Doctor – The doctor to be selected for whom the RCPA is conducted.
5. Brand SKU – The own brand and competitor brand will be displayed. On clicking EDIT the user can enter the PV value against each brands.
6. Add to List – After the RCPA for one doctor is completed, click on ADD TO LIST to add RCPA information for another doctor.
7. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.



## viii. CHEMIST FEEDBACK

Clicking on **CH. FB** will displayed the following screen

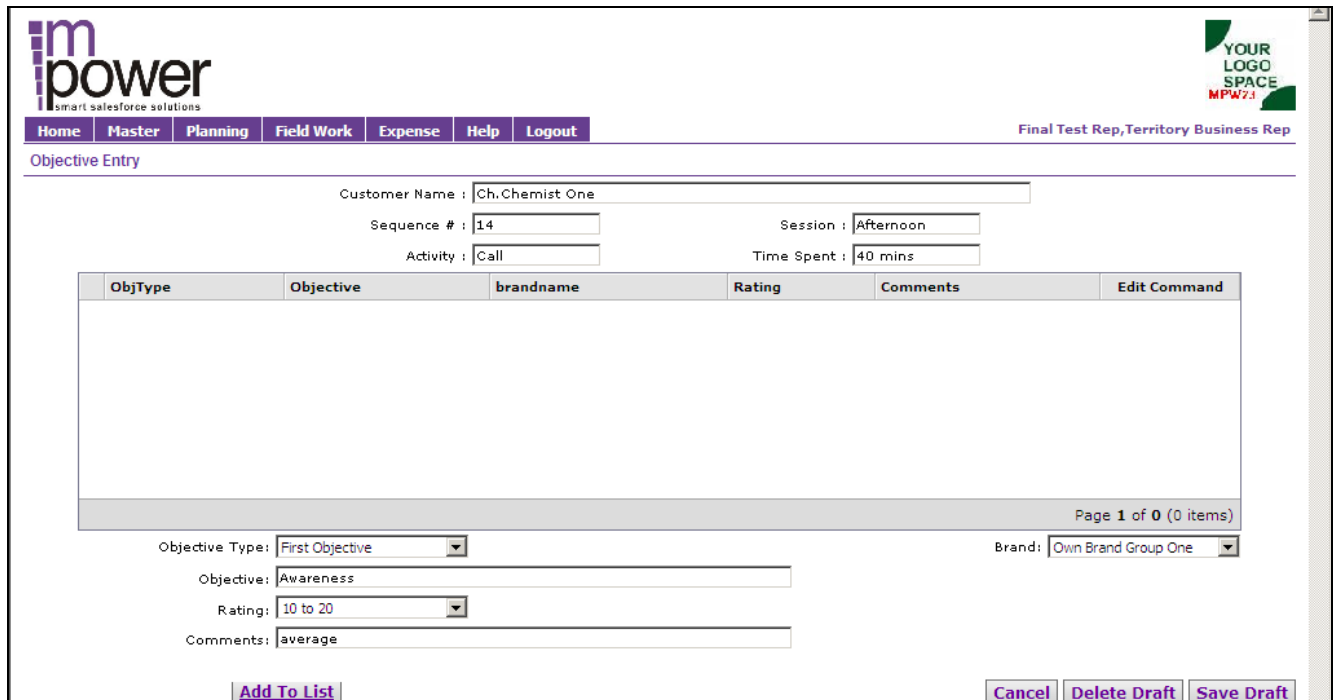


The screenshot shows the 'm power' logo in the top left corner. Below it is a navigation bar with links: Home, Master, Planning, Field Work, Expense, Help, and Logout. In the top right corner, there is a placeholder for a logo labeled 'YOUR LOGO SPACE' with 'MPW73' below it, and the text 'Final Test Rep, Territory Business Rep'. The main heading of the form is 'FeedBack'. The form contains several input fields: 'Customer Name' with the value 'Ch.Chemist One', 'Sequence #' with '14', 'Session' with 'Afternoon', 'Activity' with 'Call', and 'Time Spent' with '40 mins'. There is a 'Remarks' field with the text 'Need to improve'. At the bottom of the form are three buttons: 'Delete Draft', 'Cancel', and 'Save Draft'.

1. Remarks – The will type Remarks. This is a free text.
2. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## ix. OBJECTIVES

Clicking on **OBJ** will displayed the following screen



The screenshot shows the 'Objective Entry' screen in the m power application. The top navigation bar includes links for Home, Master, Planning, Field Work, Expense, Help, and Logout. The user is logged in as 'Final Test Rep, Territory Business Rep'. The screen displays a form for entering an objective with the following fields:

- Customer Name: Ch.Chemist One
- Sequence #: 14
- Session: Afternoon
- Activity: Call
- Time Spent: 40 mins

Below the form is a table with the following columns: ObjType, Objective, brandname, Rating, Comments, and Edit Command. The table is currently empty, showing 'Page 1 of 0 (0 items)'. At the bottom of the form, there are additional fields for Objective Type (First Objective), Objective (Awareness), Rating (10 to 20), and Comments (average). The Brand is set to 'Own Brand Group One'. At the bottom right, there are buttons for 'Add To List', 'Cancel', 'Delete Draft', and 'Save Draft'.

1. Objective Type – The Objective type to be selected from the drop down.
2. Brand – If the objective is related to brand then brand can be selected from the drop down.
3. Objective – Describe the Objective. This is a free text field.
4. Ratings – Ratings to be selected from the drop down.
5. Comments – Comments to be added. This is a free text field.
6. Add to List – After the feedback is entered, click on ADD TO LIST to add another issue.
7. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## **v. Stockist Visit**

**Getting there:** Login -> Select Field Work menu option -> Select DCR Entry option

### **Select a stockist**

Open the daily activity screen and select the stockist TAB. The summary of stockist selected from the plan is visible in a grid for selection. To know how this grid is prepared refer to the section “Planning a days field report” and “Planning a days field report without tour plan”. The stockist whose activity report is to be made has to be first searched in the stockist grid. The name of the stockist is shown in the Stockist Name field after selecting the entry from the stockist selection grid.

### **Set the visit date**

In the header of the daily activity report Select the activity type as FIELD DAY and the DATE is automatically set as the activity date for which the DAR is to be posted. The date cannot be manually entered.

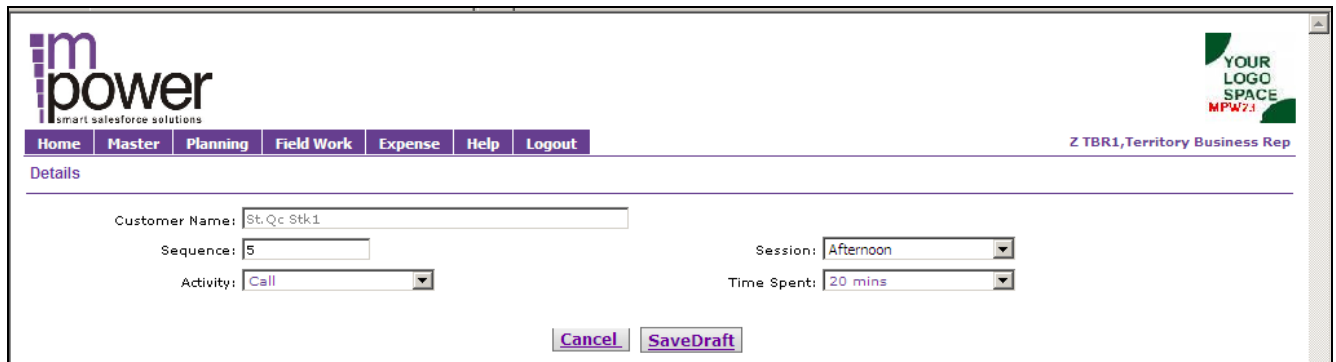
### **Capture visit information**

To capture information about the stockist visit, the name will have to be selected from the stockist block and then details for the same will have to be entered in the remarks column.

## ▪ Field Day- Stockist Entry

### i. DETAILS

Clicking on **DETAILS** will displayed the following screen



The screenshot shows the 'DETAILS' screen for 'Field Day- Stockist Entry'. The interface includes the m power logo and 'smart salesforce solutions' text. A navigation bar contains links: Home, Master, Planning, Field Work, Expense, Help, and Logout. The user is logged in as 'Z TBR1, Territory Business Rep'. The 'Details' section contains the following fields:

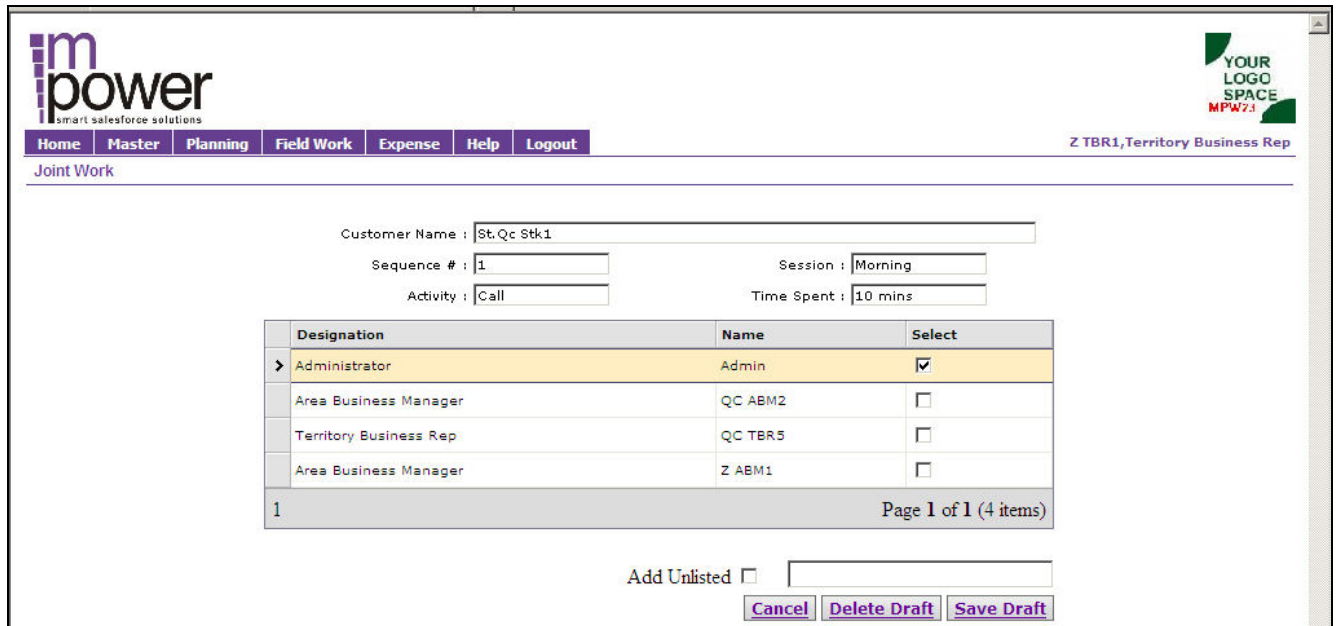
- Customer Name:
- Sequence:
- Session:
- Activity:
- Time Spent:

At the bottom, there are two buttons: 'Cancel' and 'SaveDraft'.

1. Customer Name: The name of the customer will be displayed.
2. Sequence: The sequence no to be entered.
3. Session: Select the session from the drop down.
4. Activity: Select the activity i.e. call or campaign.
5. Time spent: Select the time spent from the drop down.
6. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## ii. JOINT WORK

Clicking on JW will displayed the following screen



The screenshot shows the 'Joint Work' screen in the m power application. The header includes the m power logo, navigation tabs (Home, Master, Planning, Field Work, Expense, Help, Logout), and the user's role 'Z TBR1, Territory Business Rep'. The main form contains fields for Customer Name (St.Qc Stk1), Sequence # (1), Session (Morning), Activity (Call), and Time Spent (10 mins). Below these fields is a table with columns Designation, Name, and Select. The table lists four items: Administrator (Admin, checked), Area Business Manager (QC ABM2, unchecked), Territory Business Rep (QC TBR5, unchecked), and Area Business Manager (Z ABM1, unchecked). At the bottom, there is an 'Add Unlisted' checkbox and a text input field, along with 'Cancel', 'Delete Draft', and 'Save Draft' buttons.

Designation	Name	Select
Administrator	Admin	<input checked="" type="checkbox"/>
Area Business Manager	QC ABM2	<input type="checkbox"/>
Territory Business Rep	QC TBR5	<input type="checkbox"/>
Area Business Manager	Z ABM1	<input type="checkbox"/>

Page 1 of 1 (4 items)

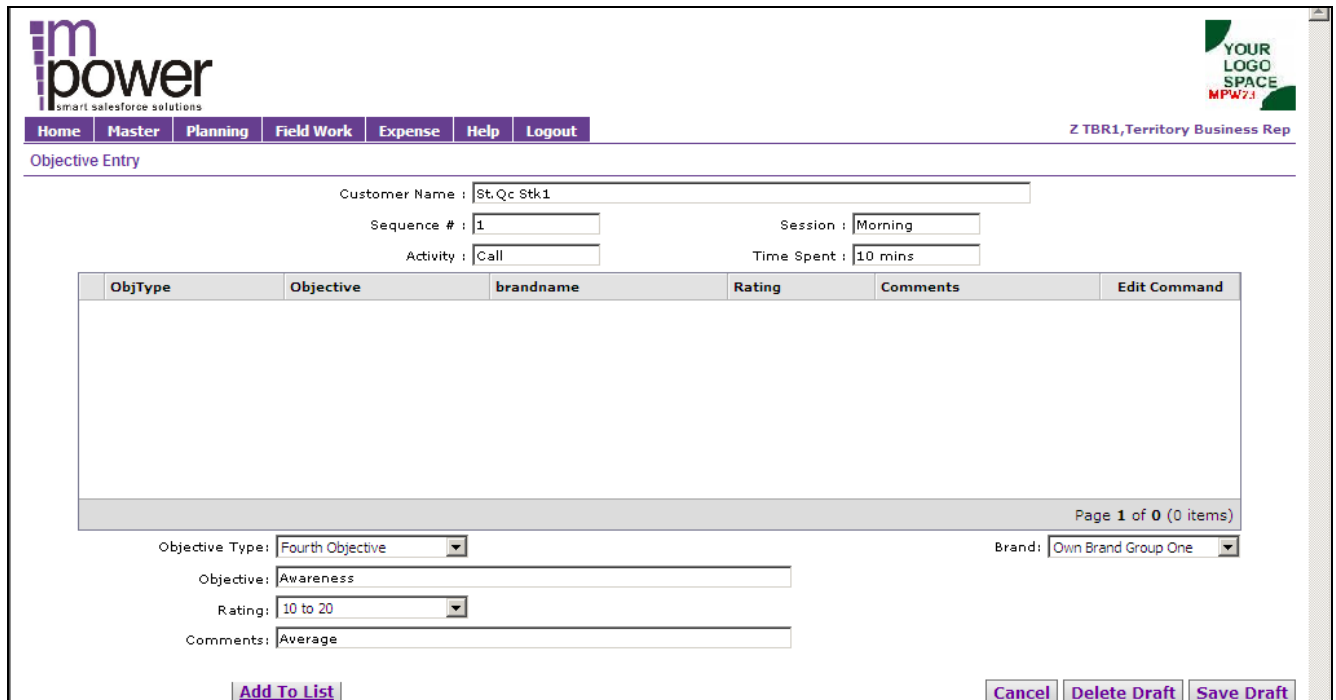
Add Unlisted ☐

[Cancel](#) [Delete Draft](#) [Save Draft](#)

1. The REP will mark in the check box to assign a manager as joint work.
2. Add unlisted – If the REP has visited the customer with an unlisted person, then he will type the name.
3. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

### iii. OBJECTIVES

Clicking on **OBJ** will displayed the following screen



The screenshot shows the 'Objective Entry' screen in the m power application. The top navigation bar includes links for Home, Master, Planning, Field Work, Expense, Help, and Logout. The user is logged in as 'Z TBR1, Territory Business Rep'. The screen displays a form for entering an objective with the following fields:

- Customer Name: St.Qc Stk1
- Sequence #: 1
- Session: Morning
- Activity: Call
- Time Spent: 10 mins

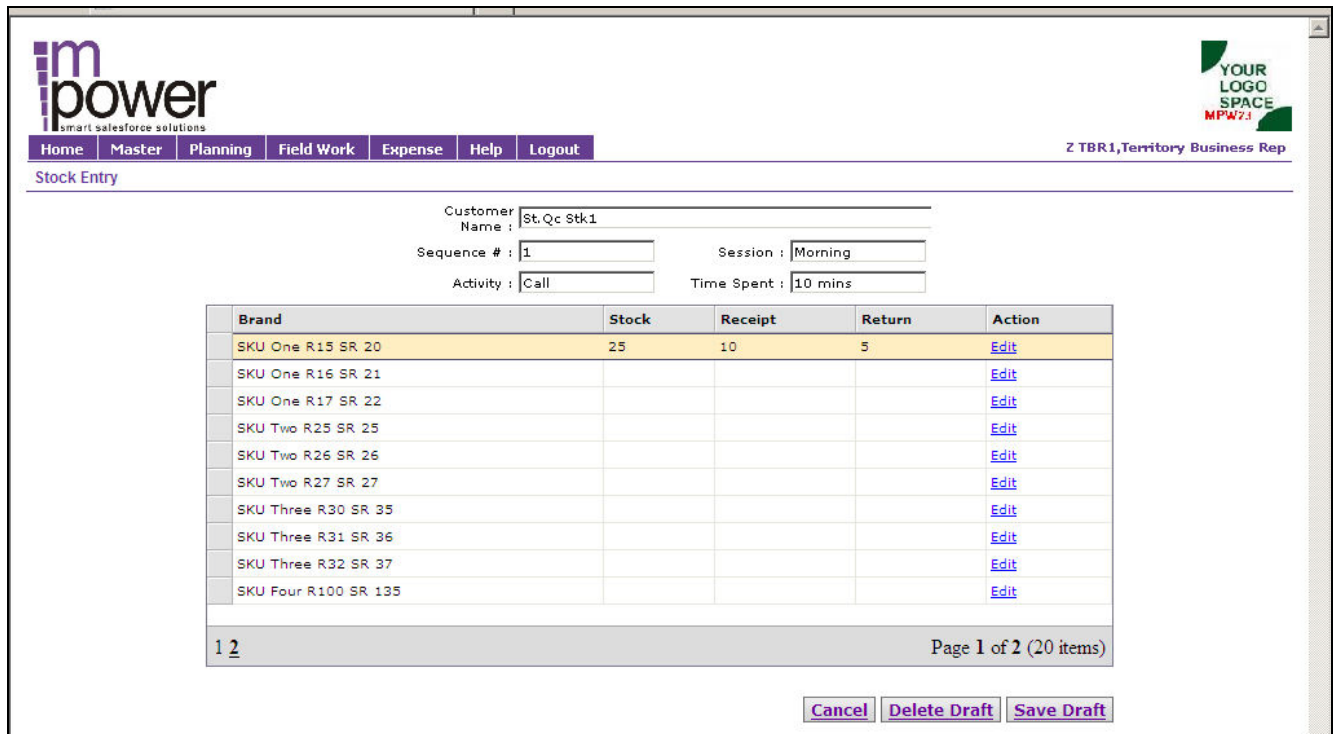
Below these fields is a table with the following columns: ObjType, Objective, brandname, Rating, Comments, and Edit Command. The table is currently empty, showing 'Page 1 of 0 (0 items)'. At the bottom of the form, there are additional fields for:

- Objective Type: Fourth Objective (dropdown)
- Brand: Own Brand Group One (dropdown)
- Objective: Awareness (text field)
- Rating: 10 to 20 (dropdown)
- Comments: Average (text field)

At the bottom of the screen, there are three buttons: 'Add To List', 'Cancel', and 'Delete Draft'.

1. Objective Type – The Objective type to be selected from the drop down.
2. Brand – If the objective is related to brand then brand can be selected from the drop down.
3. Objective – Describe the Objective. This is a free text field.
4. Ratings – Ratings to be selected from the drop down.
5. Comments – Comments to be added. This is a free text field.
6. Add to List – After the feedback is entered, click on ADD TO LIST to add another issue.
7. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

#### iv. STOCK ENTRY



The screenshot shows the 'm power' logo and 'smart salesforce solutions' text. Below the logo is a navigation bar with links: Home, Master, Planning, Field Work, Expense, Help, Logout. On the right, it says 'Z TBR1, Territory Business Rep'. The main heading is 'Stock Entry'.

Form fields include:

- Customer Name: St.Qc Stk1
- Sequence #: 1
- Session: Morning
- Activity: Call
- Time Spent: 10 mins

Brand	Stock	Receipt	Return	Action
SKU One R15 SR 20	25	10	5	<a href="#">Edit</a>
SKU One R16 SR 21				<a href="#">Edit</a>
SKU One R17 SR 22				<a href="#">Edit</a>
SKU Two R25 SR 25				<a href="#">Edit</a>
SKU Two R26 SR 26				<a href="#">Edit</a>
SKU Two R27 SR 27				<a href="#">Edit</a>
SKU Three R30 SR 35				<a href="#">Edit</a>
SKU Three R31 SR 36				<a href="#">Edit</a>
SKU Three R32 SR 37				<a href="#">Edit</a>
SKU Four R100 SR 135				<a href="#">Edit</a>

Page 1 of 2 (20 items)

Buttons: [Cancel](#) [Delete Draft](#) [Save Draft](#)

1. Brand – The brands will be displayed.

On clicking the EDIT link the system will allow to enter the following fields.

2. Stock – Stock to be entered. This is a numeric field.

3. Receipt – Stock given to the Stockist to be entered. This is a numeric field.

4. Returned – Stock returned by the Stockist to be entered. This is a numeric field.

5. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## v. STOCKIST FEEDBACK

Clicking on **STK. FB** will displayed the following screen

The screenshot shows the mpower web application interface. At the top left is the mpower logo. To the right is a placeholder for a user logo with the text "YOUR LOGO SPACE MPW7.1". Below the logo is a navigation menu with buttons: Home, Master, Planning, Field Work, Expense, Help, and Logout. The user's role, "Z TBR1, Territory Business Rep", is displayed on the right. The main section is titled "FeedBack". It contains several input fields: "Customer Name" with the value "St. Qc Stk1", "Sequence #" with the value "5", "Session" with the value "Afternoon", "Activity" with the value "Call", and "Time Spent" with the value "10 mins". There is also a "Remarks" field with the value "Good". At the bottom of the form are three buttons: "Delete Draft", "Cancel", and "Save Draft".

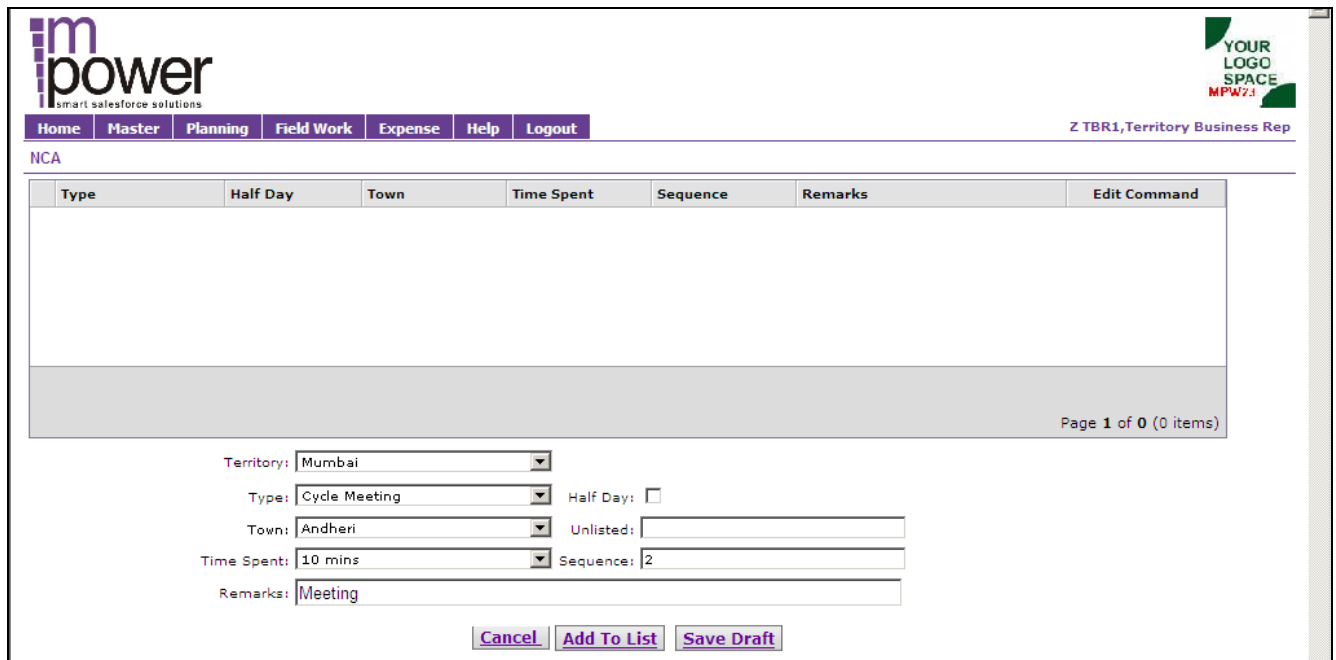
1. Remarks – The will type Remarks. This is a free text field.
2. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.



## b) Recording Non Call Activity

**Getting there:** Login -> Select Field Work menu option -> Select DCR Entry option -> Select NCA Tab

In case part of a field day is used for some non field activities (unplanned), then while recording DAR this non field information can be captured.



**m power** smart salesforce solutions

Home Master Planning Field Work Expense Help Logout

Z TBR1, Territory Business Rep

**NCA**

Type	Half Day	Town	Time Spent	Sequence	Remarks	Edit Command
Page 1 of 0 (0 items)						

Territory:

Type:  Half Day: ☐

Town:  Unlisted:

Time Spent:  Sequence:

Remarks:

1. Territory – Territory to be selected from the drop down where the user had done NCA from drop down.
2. Type – The NCA type to be selected from the drop down.
3. Half Day – If the user marks on Half day, the NCA will be counted as Half Day NCA and if not marked then the NCA will be counted as Full Day NCA.
4. Town – Town to be selected from the drop down where the user had done NCA from drop down.
5. Unlisted – If the user had visited the town which is not in his geographical hierarchy, he can enter the name of the town here. This is a free text field.
6. Time Spent – The time spent to be selected from the drop down.
7. Sequence – The Sequence of the NCA to be mentioned.
8. Remarks – The user can enter remarks. This is a free text field.

9. Add to List – If the user has had more than one NCA, then he can enter another NCA by clicking this button.
10. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

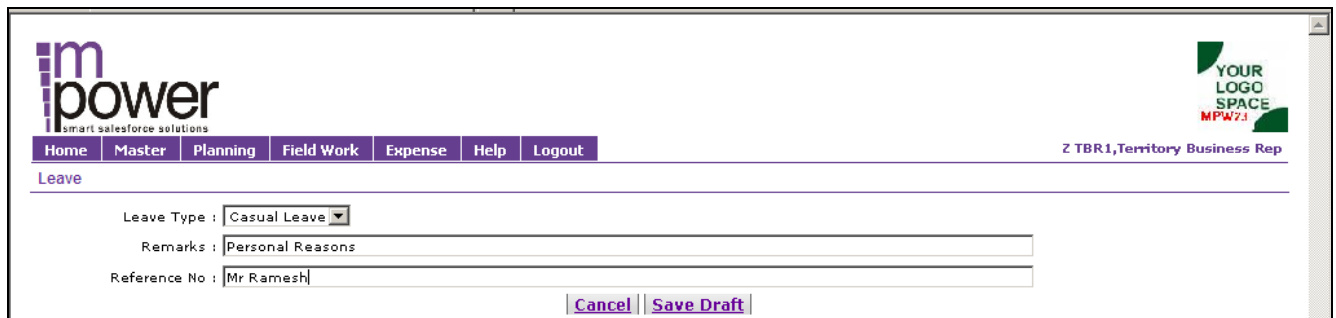
c) **Recording a leave**

**Getting there:** Login -> Select Field Work menu option -> Select DCR entry -> Select Leave Tab

i) **Capture leave details**

After clicking on LEAVE, the purpose of taking the leave must be entered in the Remarks column provided.

▪ **Leave**



The screenshot shows the 'Leave' form in the m power application. The form has a header with the m power logo and a navigation bar with links: Home, Master, Planning, Field Work, Expense, Help, and Logout. The user is logged in as 'Z TBR1, Territory Business Rep'. The form contains three input fields: 'Leave Type' with a dropdown menu showing 'Casual Leave', 'Remarks' with the text 'Personal Reasons', and 'Reference No' with the text 'Mr Ramesh'. At the bottom of the form are two buttons: 'Cancel' and 'Save Draft'.

1. Leave Type – The Leave type to be selected from the drop down.
2. Remarks – The user can enter remarks. This is a free text field.
3. Reference – The user can enter with whom has he referred to for prior to entering a leave. This is a free text field.
4. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

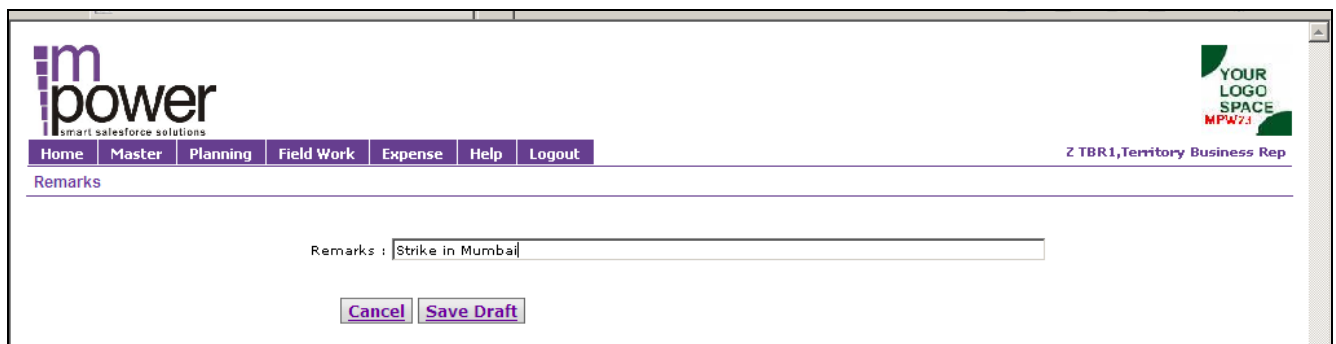
#### d) Recording General Remarks

**Getting there:** Login -> Select Field Work menu option -> Select DCR entry -> Select Remarks Tab

#### ii) **Capture General Remarks**

The user can enter general remarks for the day in case he has not made any calls due to some reasons other than leave or NCA

- **Leave**



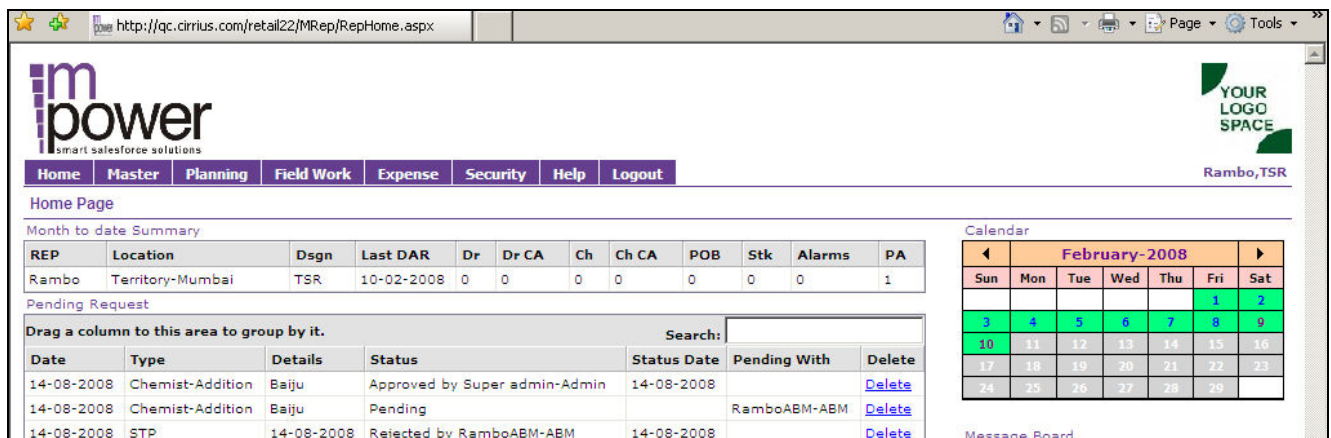
The screenshot shows the m power web application interface. At the top left is the m power logo. Below it is a navigation bar with tabs: Home, Master, Planning, Field Work, Expense, Help, and Logout. On the right side of the navigation bar, it says "Z TBR1, Territory Business Rep". Below the navigation bar, the word "Remarks" is displayed. In the center, there is a text input field with the label "Remarks :" and the text "Strike in Mumbai" entered. Below the input field are two buttons: "Cancel" and "Save Draft".

1. Remarks – The user can enter remarks. This is a free text field.
2. Cancel and Save Draft: Clicking on Cancel will erase the entry done and Save Draft will save the entry.

## e) View daily activity report (DAR)

The MR web home page contains a calendar which shows the dates configured based on the holidays (Refer to section “MR Dash board”). The days on which the daily activity report has been posted will be distinctly visible on the calendar with a GREEN background. On clicking on a date on the calendar the daily activity report is activated.

### ▪ Daily Activity Report



The screenshot shows the MR web home page with the following components:

- Navigation Bar:** Home, Master, Planning, Field Work, Expense, Security, Help, Logout.
- Home Page:** Month to date Summary.
- Month to date Summary Table:**

REP	Location	Dsgn	Last DAR	Dr	Dr CA	Ch	Ch CA	POB	Stk	Alarms	PA
Rambo	Territory-Mumbai	TSR	10-02-2008	0	0	0	0	0	0	0	1
- Pending Request:**

Drag a column to this area to group by it.

Date	Type	Details	Status	Status Date	Pending With	Delete
14-08-2008	Chemist-Addition	Baiju	Approved by Super admin-Admin	14-08-2008		<a href="#">Delete</a>
14-08-2008	Chemist-Addition	Baiju	Pending		RamboABM-ABM	<a href="#">Delete</a>
14-08-2008	STP	14-08-2008	Rejected by RamboABM-ABM	14-08-2008		<a href="#">Delete</a>
- Calendar:** February-2008. The calendar shows dates from 1 to 29. Dates 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29 are highlighted in green.
- Message Board:** Located at the bottom right of the page.

1. Calendar: The calendar shows the current month and the dates of the month are can be selected by moving the mouse cursor over it. If a DAR has been posted on a date and the REP clicks with the mouse on that date, would run the daily report.

## ▪ Daily Activity Report

The Daily activity report for specific days can also be got by going to Field Work Tab of main menu. Enter the Date for which Daily Activity Report has to be viewed.

[Home](#)
[Master](#)
[Planning](#)
[Field Work](#)
[Expense](#)
[Help](#)
[Logout](#)

Z TBR1, Territory Business Rep

Daily Activity Report

Date:

Location: Mumbai

dd-mm-yyyy

Back

DAR Submission Details

DAR Date	Day	Day Type	Submit Mode	Submit Date/Time	Location Planned	Location Worked
06-01-2009	Tuesday	Working	Web	08-01-2009 12:35	Malad-Malad, Andheri-Andheri	Malad-Malad

Call Activities

Sr.No	Location/Account	Customer Details	Planned	Call Details	Activities Done
1	Malad - Malad	Ch.Qc Chm2, Chem B, 2	Yes	Call, Afternoon, 10 mins, 3	<a href="#">CHENPOB</a> , <a href="#">CHEMObjective</a> , <a href="#">CHEMGPI</a> , <a href="#">RCPAEntry</a> , <a href="#">CHEMFeedback</a> , <a href="#">ChemCloseIssue</a> , <a href="#">CHEMJWW</a> , <a href="#">CHEMIssue</a>
2	Malad - Malad	Dr.Qc Dr4 QC DR4, BEAU, B, 3	Yes	QC Campaign2, Evening, 30 mins, 1	<a href="#">DrCloseIssue</a> , <a href="#">DRGPI</a> , <a href="#">DRIssue</a> , <a href="#">DRObjective</a> , <a href="#">DRFeedback</a> , <a href="#">DRPP</a> , <a href="#">DRJWW</a>
3	Malad - Malad	Dr.Qc Dr5 QC DR5, BEAU, C, 1	Yes	Call, Afternoon, 20 mins, 2	<a href="#">DRGPI</a> , <a href="#">DRIssue</a> , <a href="#">DRObjective</a> , <a href="#">DRFeedback</a> , <a href="#">DRPP</a> , <a href="#">DRJWW</a>
4	Malad - Malad	St.Qc Stk1, 1	Yes	Call, Morning, 40 mins, 5	<a href="#">STKObjective</a> , <a href="#">STKJWW</a> , <a href="#">STKFeedback</a> , <a href="#">STKInventory</a>
5	Malad - Malad	Ch.Qc Chm2, Chem B, 2	Yes	Call, Evening, 40 mins, 4	<a href="#">CHENPOB</a> , <a href="#">CHEMObjective</a> , <a href="#">CHEMGPI</a> , <a href="#">RCPAEntry</a> , <a href="#">CHEMFeedback</a> , <a href="#">ChemCloseIssue</a> , <a href="#">CHEMJWW</a> , <a href="#">CHEMIssue</a>

Month-To-Date Summary

Status	Doctor Calls				Chemist Calls				Stockist Calls	Total POB Value (Dr+Ch)
	Listed Planned	Listed UnPlanned	UnListed	Total	Listed Planned	Listed UnPlanned	UnListed	Total		
Today	2	0	0	2	1	0	0	1	1	2400
B/F	7	1	0	8	3	1	0	4	2	104850
Cuml	9	1	0	10	4	1	0	5	3	107250
Average	2	0.22	0	2.22	0.88	0.22	0	1.11	0.66	23833.33

Manager's Comment

Date	Managers	Comments

Page 1 of 0 (0 items)

## 1. Visit details shown in DAR for Doctor, Chemist and Stockist

- Location – The location where the user has made his call will be displayed.
- Customer Details – The details of the customers will be displayed to whom the calls were made.
- Planned – If the calls were planned in MTP then it will display “Yes” against that call, if not planned in MTP then it will display “No”
- Call Details – The call details will be displayed i.e. type of call, time of call, time spent.
- Activities Done – The activities carried out by the user will be displayed. On clicking the link the details of the call will be displayed:

### CHEMIST ACTIVITIES

- |                    |                                  |
|--------------------|----------------------------------|
| 1. CHEMPOB         | – Chemist POB                    |
| 2. CHEMObjctive    | – Chemist Objective              |
| 3. CHEMGPI         | – Chemist GPI                    |
| 4. CHEMFeedback    | – Chemist Feedback               |
| 5. ChemCloselIssue | – Chemist Issue Closed           |
| 6. CHEMJWW         | – Chemist Joint Work             |
| 7. CHEMIssue       | – Chemist Issue Added            |
| 8. RCPAEntry       | – RCPA entry details of chemist. |

### DOCTOR ACTIVITIES

- |                  |   |
|------------------|---|
| 1. DrCloselIssue | – Doctor Issue Closed                   |
| 2. DRGPI         | – Doctor GPI                            |
| 3. DRFeedback    | – Doctor Feedback                       |
| 4. DRJWW         | – Doctor Joint Work                     |
| 5. DRIssue       | – Doctor Issue Added                    |
| 6. DRObjctive    | – Doctor Objective                      |
| 7. DRPP          | – Doctor Product Promotion information. |

### STOCKIST ACTIVITIES

- |                 |                               |
|-----------------|-------------------------------|
| 1. STKObjective | – Stockist Objective.         |
| 2. STKJWW       | – Stoickist Joint Work        |
| 3. STKFeedback  | – Stockist Feedback           |
| 4. STKInventory | – Stockist Inventory details. |

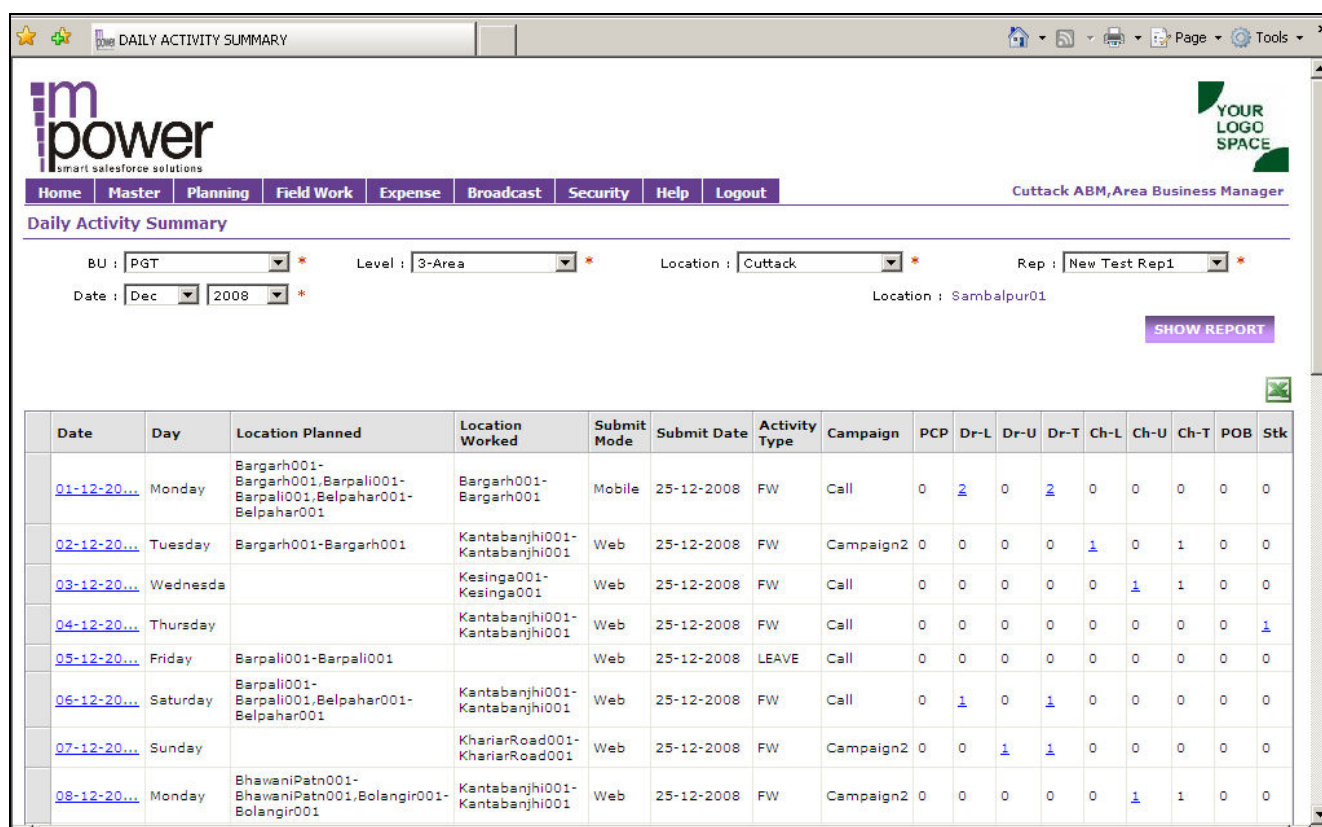
## f) View Field Work Analytics

### vi. Daily Activity summary

Parameters:-

- BU – Name of the REP's Business unit is shown by default. This is not modifiable by REP. However it is selectable if the login is a manager.
- Level – Select the level from the list for which area the report has to be seen.
- Location – By default it is blank. Area has to be selected from a list attached.
- REP – This is not modifiable by REP. It is selectable if the login is a manager.
- Date – The period for which the activity summary is to be viewed.

Report:-



Date	Day	Location Planned	Location Worked	Submit Mode	Submit Date	Activity Type	Campaign	PCP	Dr-L	Dr-U	Dr-T	Ch-L	Ch-U	Ch-T	POB	Stk
01-12-20...	Monday	Bargarh001-Bargarh001,Barpali001-Barpali001,Belpahar001-Belpahar001	Bargarh001-Bargarh001	Mobile	25-12-2008	FW	Call	0	2	0	2	0	0	0	0	0
02-12-20...	Tuesday	Bargarh001-Bargarh001	Kantabanjhi001-Kantabanjhi001	Web	25-12-2008	FW	Campaign2	0	0	0	0	1	0	1	0	0
03-12-20...	Wednesda		Kesinga001-Kesinga001	Web	25-12-2008	FW	Call	0	0	0	0	0	1	1	0	0
04-12-20...	Thursday		Kantabanjhi001-Kantabanjhi001	Web	25-12-2008	FW	Call	0	0	0	0	0	0	0	0	1
05-12-20...	Friday	Barpali001-Barpali001		Web	25-12-2008	LEAVE	Call	0	0	0	0	0	0	0	0	0
06-12-20...	Saturday	Barpali001-Barpali001,Belpahar001-Belpahar001	Kantabanjhi001-Kantabanjhi001	Web	25-12-2008	FW	Call	0	1	0	1	0	0	0	0	0
07-12-20...	Sunday		KhariarRoad001-KhariarRoad001	Web	25-12-2008	FW	Campaign2	0	0	1	1	0	0	0	0	0
08-12-20...	Monday	BhawaniPatn001-BhawaniPatn001,Bolangir001-Bolangir001	Kantabanjhi001-Kantabanjhi001	Web	25-12-2008	FW	Campaign2	0	0	0	0	0	1	1	0	0



The report shows summarized details of each days work done by the selected REP during a selected month;

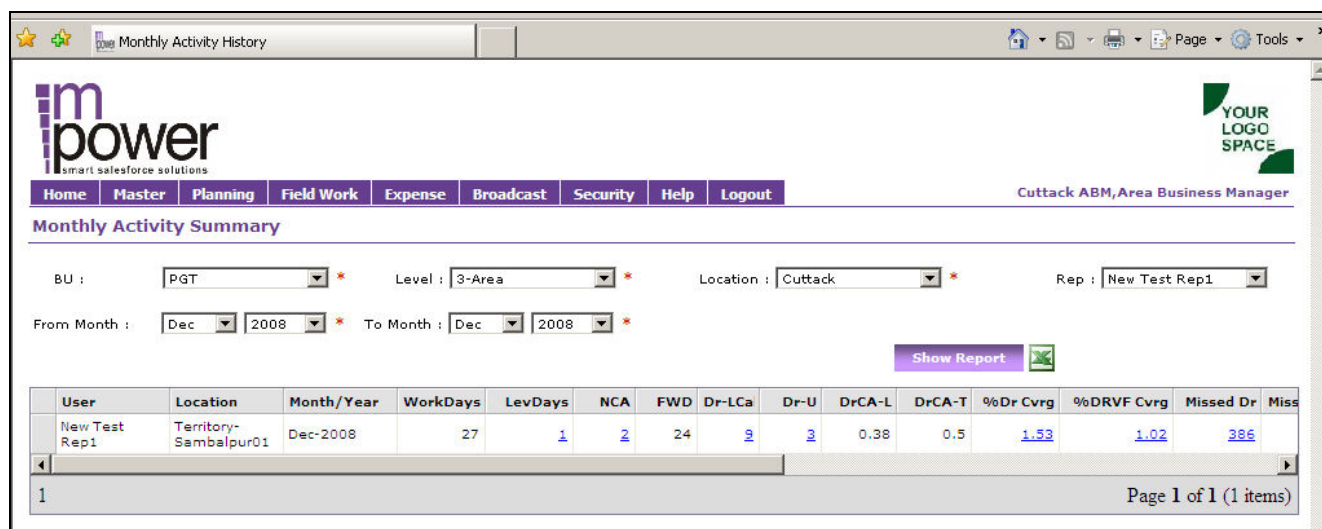
- |                           |  |
|---------------------------|--|
| a. Date                   | – Date of the selected month.  |
| b. Day                    | – Day of the week and the type of day for each date of the month.  |
| c. Location Planned       | - The location planned in MTP will be displayed in this box.   |
| d. Location Worked        | - The Location worked will be displayed.   |
| e. Submit Mode            | – Mode of DAR submitted i.e. Mobile.   |
| f. Submit Date            | – Date of last activity synched for the day in case of Mobile or date of DAR submission in case of Web.  |
| g. Activity type          | – FW, NFD, Leave, Holiday, Weekly Off  |
| h. Campaign               | - The name of the Campaign conducted on that date will be displayed.   |
| i. PCP                    | - The count of PCP done before meeting the customer will be displayed.   |
| j. Listed Doctor calls    | – Total calls made to the listed doctors.  |
| k. Unlisted Doctor calls  | – Total calls made to the unlisted doctors.  |
| l. Doctor Total           | – Total Doctor met today i.e. unlisted and listed.   |
| m. Listed Chemist calls   | – Total calls made to the listed chemists.   |
| n. Unlisted Chemist calls | – No. of calls made to unlisted chemists.  |
| o. Chemist Total          | – Total Chemists met today i.e. unlisted and listed.   |
| p. POB                    | – Total Rupee Value of orders booked for the day from the chemist visits.  |
| q. Stockist               | – Number of Stockist visited   |
| r. Non Call Activity      | – Type of NFD will be shown if the applicable for the date.  |
| s. Joint Work             | – Name of person worked with (No. of calls made with this person today); In case of no. of persons is more than 1, they are separated by comma |
| t. Managers comments      | – Date, Manager Designation/ Short Name, comment; multiple comments are separated by commas  |

## vii. Monthly Activity Summary Retail

### Parameters:-

- |               |  |
|---------------|--|
| a. BU         | – Name of the REP's Business unit is shown by default.                       |
| b. Level      | – Select the level from the list for which area the report has to be seen.   |
| c. Location   | – By default it is blank. Area has to be selected from a list attached.      |
| d. REP        | – This is not modifiable by REP. It is selectable if the login is a manager. |
| e. From Month | – The month from which analytics is to be viewed.                            |
| f. To Month   | – The month up to which analytics is to be viewed.                           |

### Report:-



User	Location	Month/Year	WorkDays	LevDays	NCA	FWD	Dr-LCa	Dr-U	DrCA-L	DrCA-T	%Dr Cvrg	%DRVF Cvrg	Missed Dr	Miss
New Test Rep1	Territory-Sambalpur01	Dec-2008	27	1	2	24	9	3	0.38	0.5	1.53	1.02	386	

Page 1 of 1 (1 items)

The report shows a REP's month wise summary of activities done and performance;

- |                          |  |
|--------------------------|--|
| 1. User                  | – Name of the REP selected in the parameters.  |
| 2. Location              | – Name of the REP's location is shown by default. This is not modifiable.  |
| 3. Month/ Year           | – The month selected to view the reports.  |
| 4. Work Days             | – No. of available working days in this month (Month Days - Weekly Offs - Holidays)  |
| 5. Leave days            | – No. of leaves taken this month. There will be a provision to click to view further details in "Daily Activity Summary" report.                 |
| 6. Non Call Activity     | – No. of Non Call Activity days taken this month. There will be a provision to click to view further details in "Daily Activity Summary" report. |
| 7. Field Work Days       | – Computed as Working days - Leave days - Non field days   |
| 8. Listed Doctor Calls   | – The count of listed doctor calls will be displayed.  |
| 9. Unlisted Doctor Calls | – The count of unlisted doctor calls will be displayed.  |

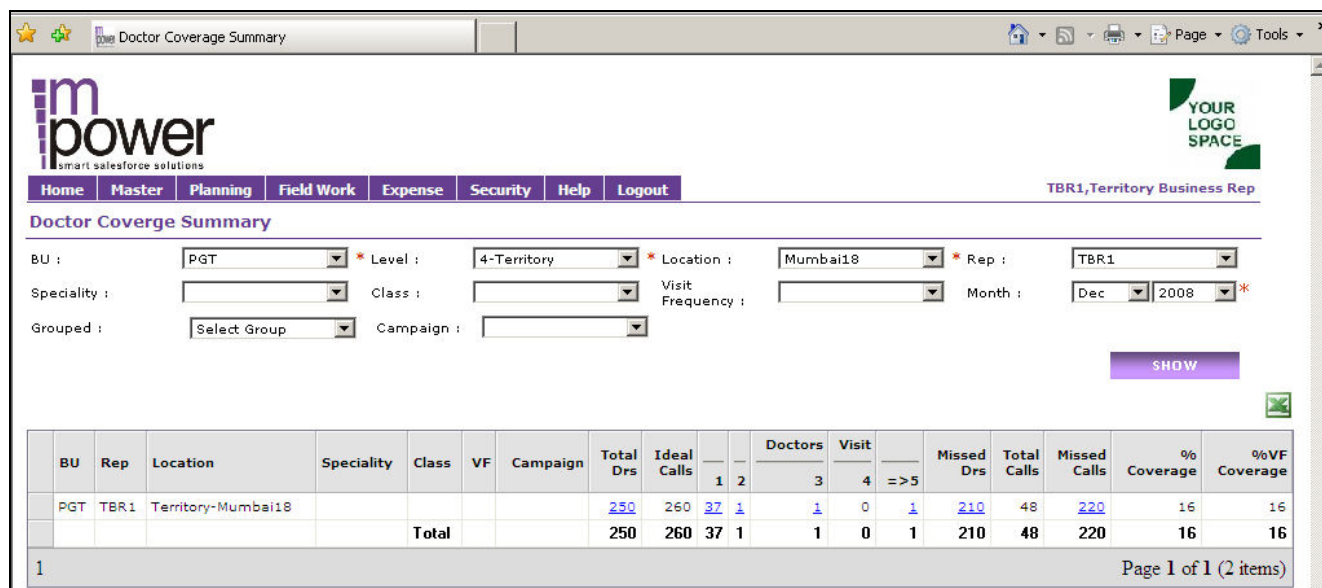
10. Listed Doctor Call average – Total listed doctor calls / Field working days.
11. Total Doctor Call Average – Total doctor listed calls + Total doctor unlisted calls / Field working days.
12. Doctor Coverage % - No. of doctors covered atleast once / total no. of doctors x 100
13. Doctor VF Coverage % - No. of doctors covered as per the predefined VF / total no. of doctors x 100
14. Missed Doctors - Count of doctors not even met once.
15. Missed Doctor Calls - Count of doctors not covered as per the predefined Visit Frequency
16. Listed Chemist Calls - The count of listed chemist calls will be displayed.
17. Unlisted Chemist Calls - The count of unlisted chemist calls will be displayed.
18. Listed Chemist Call average – Total listed chemist calls / Field working days.
19. Total Chemist Call Average – Total chemist listed calls + Total chemist unlisted calls / Field working days.
20. POB - Total value of POB taken from the doctors and chemists.
21. Stockist - Total calls made to all stockist.
22. Joint Work - No. of Joint working days. Only those days will be considered where there is joint working. There will be a provision to click to view further details in “Daily Activity Summary” report.
23. Doctors added - No. of chemists added this month. After clicking the following details will be displayed
  - i. Date added –
  - ii. Doctor name –
  - iii. Doctor short name
  - iv. Location
  - v. Specialty
  - vi. Class
  - vii. Visit Frequency
  - viii. Last visit date
  - ix. Own PV
  - x. Potential PV
  - xi. Reasons
24. Doctors deleted - No. of chemists deleted for the month, click to view the details below (7)
  - i. The same details will be shown as for Chemist Added

## viii. Doctor coverage summary

### Parameters:-

- |                    |   |
|--------------------|---|
| a. BU              | – Name of the REP's Business unit is shown by default. This is not modifiable by REP. However it is selectable if the login is a manager. |
| b. Level           | – Select the level from the list for which area the report has to be seen.  |
| c. Location        | – By default it is blank. Area has to be selected from a list attached.   |
| d. REP             | – This is not modifiable by REP. It is selectable if the login is a manager.  |
| e. Class           | – Selection of chemist class  |
| f. Visit Frequency | – Input of chemist visit frequency.   |
| g. MONTH           | – The period for which the coverage summary is to be viewed.  |

### Report:-



BU	Rep	Location	Speciality	Class	VF	Campaign	Total Drs	Ideal Calls	Doctors	Visit	Missed Drs	Total Calls	Missed Calls	% Coverage	%VF Coverage
									1	2	3	4	=>5		
PGT	TBR1	Territory-Mumbai18					250	260	37	1	1	0	1	210	48
						Total	250	260	37	1	1	0	1	210	48
														16	16

The report shows a summary of REP's coverage with respect to class and visit frequency of doctors;

- |               |   |
|---------------|---|
| a. BU         | – Name of business unit as selected.                |
| b. Level      | - Name if the Level to which the doctor is attached |
| c. Location   | – Name of the town to which the doctor is attached. |
| d. Rep        | – Name of the REP                                   |
| e. Speciality | - Specialty of the Doctor to be selected.           |
| f. Class      | – Doctor class as selected in parameters            |

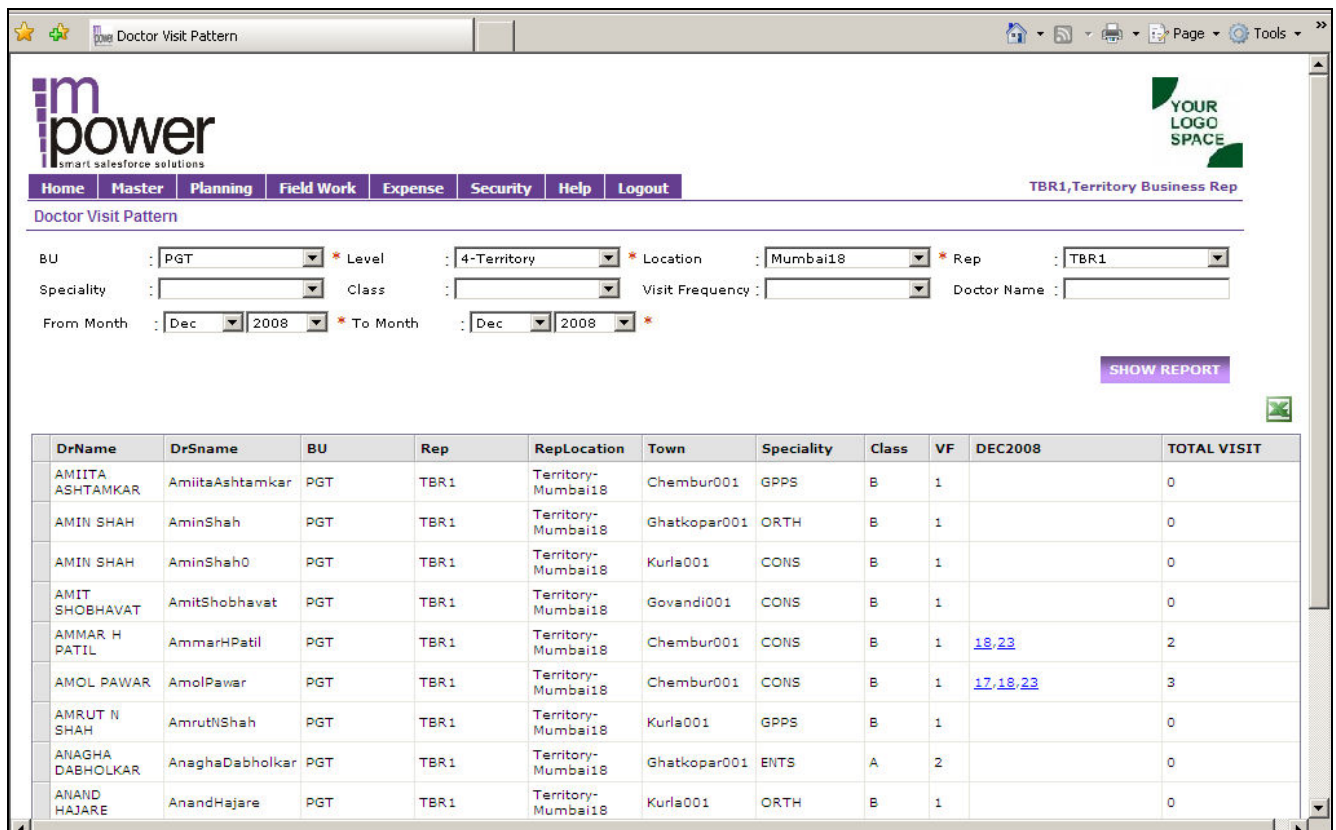
- |                           |  |
|---------------------------|--|
| g. Visit frequency        | – Visit frequency of doctors.  |
| h. Total Doctors          | – Total number of doctors who belong to the selected town, class and visit frequency.            |
| i. Ideal calls            | – Total no. of calls required to be made as per the visit frequency of doctors.                  |
| j. Doctors met once       | – The number of doctors met only once.   |
| k. Doctors met twice      | – The number of doctors met only twice.  |
| l. Doctors met thrice     | – The number of doctors met only thrice.   |
| m. Doctors met four times | – The number of doctors met four times.  |
| n. Doctors met five times | – The number of doctors met five and more times.   |
| o. Missed doctors         | – No. of doctors not met even once.  |
| p. Total calls made       | – Total no. of calls made to all the listed doctors during the month.                            |
| q. Missed calls           | – No. of calls missed as per the visit frequency of doctors.                                     |
| r. % Coverage             | – No. of doctors covered at least once/ total no. of doctors in the list                         |
| s. % Visit Freq. coverage | – No. of doctors covered as per the predefined visit frequency/ total no. of doctors in the list |

## ix. Doctor visit pattern

### Parameters:-

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>a. BU</li> <li>b. Level</li> <li>c. Location</li> <li>d. REP</li> <li>e. Specialty</li> <li>f. Class</li> <li>g. Visit Frequency</li> <li>h. Doctor Name</li> <li>i. From Month</li> <li>j. To Month</li> </ul> | <ul style="list-style-type: none"> <li>– Name of the REP's Business unit is shown by default. This is not modifiable by REP. However it is selectable if the login is a manager.</li> <li>– Select the level from the list for which area the report has to be seen.</li> <li>– By default it is blank. Area has to be selected from a list attached.</li> <li>– This is not modifiable by REP. It is selectable if the login is a manager.</li> <li>– Selection of specialty from a list.</li> <li>– Selection of doctor class</li> <li>– Input of doctor visit frequency.</li> <li>– Type the name of a doctor to get the reports of that particular doctor.</li> <li>– The month from which analytics is to be viewed.</li> <li>– The month up to which analytics is to be viewed.</li> </ul> |
|--|--|

### Report:-



DrName	DrSname	BU	Rep	RepLocation	Town	Speciality	Class	VF	DEC2008	TOTAL VISIT
AMIITA ASHTAMKAR	AmiitaAshtamkar	PGT	TBR1	Territory-Mumbai18	Chembur001	GPPS	B	1		0
AMIN SHAH	AminShah	PGT	TBR1	Territory-Mumbai18	Ghatkopar001	ORTH	B	1		0
AMIN SHAH	AminShah0	PGT	TBR1	Territory-Mumbai18	Kurla001	CONS	B	1		0
AMIT SHOBHAVAT	AmitShobhavat	PGT	TBR1	Territory-Mumbai18	Govandi001	CONS	B	1		0
AMMAR H PATIL	AmmarHPatil	PGT	TBR1	Territory-Mumbai18	Chembur001	CONS	B	1	18,23	2
AMOL PAWAR	AmolPawar	PGT	TBR1	Territory-Mumbai18	Chembur001	CONS	B	1	17,18,23	3
AMRUT N SHAH	AmrutNShah	PGT	TBR1	Territory-Mumbai18	Kurla001	GPPS	B	1		0
ANAGHA DABHOLKAR	AnaghaDabholkar	PGT	TBR1	Territory-Mumbai18	Ghatkopar001	ENTS	A	2		0
ANAND HAJARE	AnandHajare	PGT	TBR1	Territory-Mumbai18	Kurla001	ORTH	B	1		0

The report shows a summary of REP's coverage with respect to specialty and class of doctors;

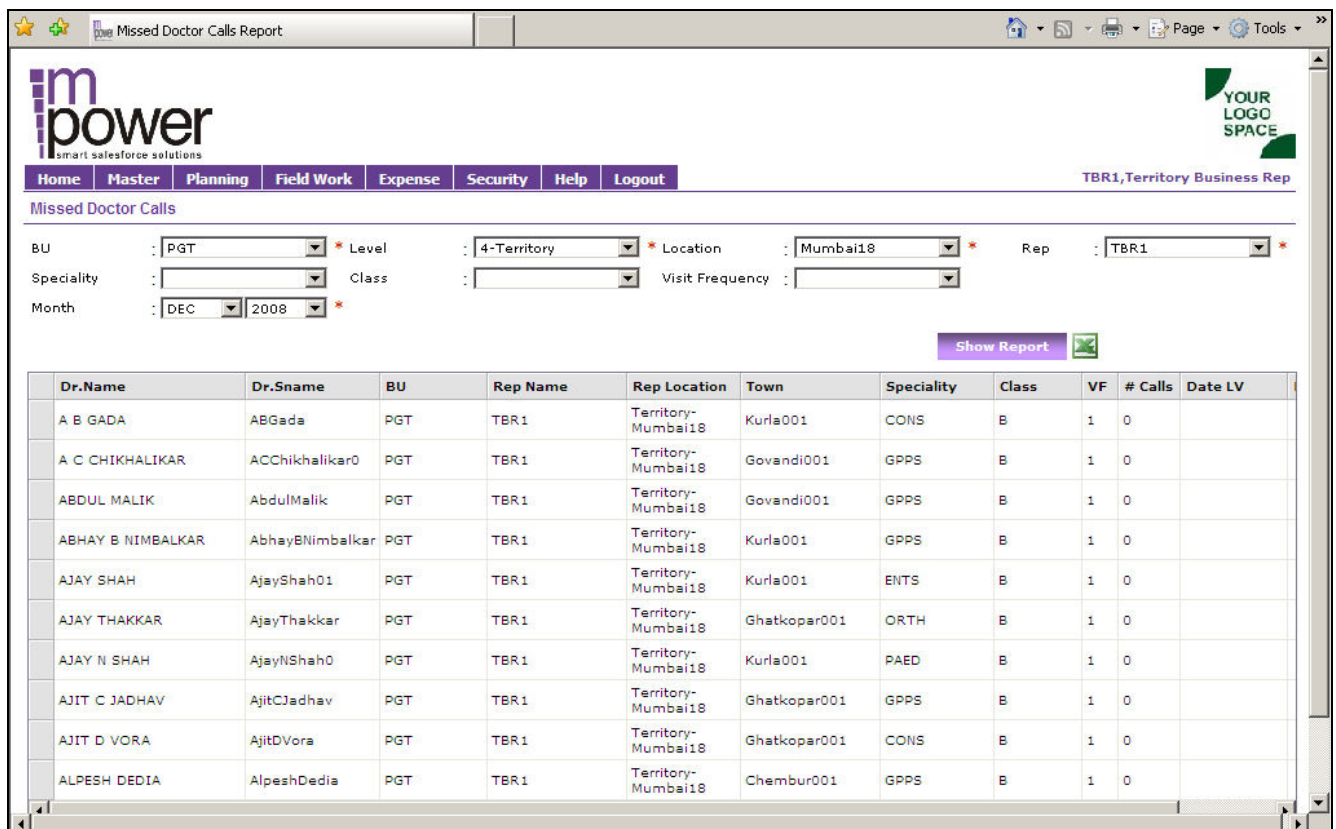
- a. Doctor Name – Name of the doctor for the selected area, specialty and class.
- b. Doctor Short Name – Short name
- c. BU – Name of business unit as selected.
- d. Rep name – Name of the REP
- e. Reps Location – Name of the REP's head quarters.
- f. Town – Name of the town to which the doctor belongs
- g. Specialty – Doctor Specialty
- h. Class – Doctor class
- i. Visit Frequency – Doctors visit frequency
- j. Month – Actual visit dates in the respective month are shown separated by commas.  
The number of months is shown as per the selected period in parameters.
- k. Total visits – Total no. of visits in the selected period

## x. Missed Doctor Calls

### Parameters:-

- BU – Name of the REP's Business unit is shown by default. This is not modifiable by REP. However it is selectable if the login is a manager.
- Level – Select the level from the list for which area the report has to be seen.
- Location – By default it is blank. Area has to be selected from a list attached.
- REP – This is not modifiable by REP. It is selectable if the login is a manager.
- Specialty – Selection of specialty from a list.
- Class – Selection of doctor class
- Visit Frequency – Input of doctor visit frequency.
- Month – The period for which the missed call details is to be viewed.

### Report:-



Dr.Name	Dr.Sname	BU	Rep Name	Rep Location	Town	Speciality	Class	VF	# Calls	Date LV
A B GADA	ABGada	PGT	TBR1	Territory-Mumbai18	Kurla001	CONS	B	1	0	
A C CHIKHALIKAR	ACChikhalikar0	PGT	TBR1	Territory-Mumbai18	Govandi001	GPPS	B	1	0	
ABDUL MALIK	AbdulMalik	PGT	TBR1	Territory-Mumbai18	Govandi001	GPPS	B	1	0	
ABHAY B NIMBALKAR	AbhayBNimbalkar	PGT	TBR1	Territory-Mumbai18	Kurla001	GPPS	B	1	0	
AJAY SHAH	AjayShah01	PGT	TBR1	Territory-Mumbai18	Kurla001	ENTS	B	1	0	
AJAY THAKKAR	AjayThakkar	PGT	TBR1	Territory-Mumbai18	Ghatkopar001	ORTH	B	1	0	
AJAY N SHAH	AjayNShah0	PGT	TBR1	Territory-Mumbai18	Kurla001	PAED	B	1	0	
AJIT C JADHAV	AjitCJadhav	PGT	TBR1	Territory-Mumbai18	Ghatkopar001	GPPS	B	1	0	
AJIT D VORA	AjitDVora	PGT	TBR1	Territory-Mumbai18	Ghatkopar001	CONS	B	1	0	
ALPESH DEDIA	AlpeshDedia	PGT	TBR1	Territory-Mumbai18	Chembur001	GPPS	B	1	0	

The report shows a list of all the doctors for whom the no. of calls made during the month are less than the predefined visit frequency;

- Doctor Name – Name of the doctor for the selected area, specialty and class.



- b. Doctor Short Name – Short name
- c. BU – Name of business unit as selected.
- d. Rep name – Name of the REP
- e. Reps location – Name of the REP's location.
- f. Town – Name of the town to which the doctor belongs
- g. Specialty – Doctor Specialty
- h. Class – Doctor class
- i. Visit Frequency – Doctors visit frequency
- j. No of visits during month – Total number of visits to the doctor for selected month
- k. Last visit date – The last visit date is displayed.
- l. No of days since last visit – No of days lapsed since the last visit date to the doctor.

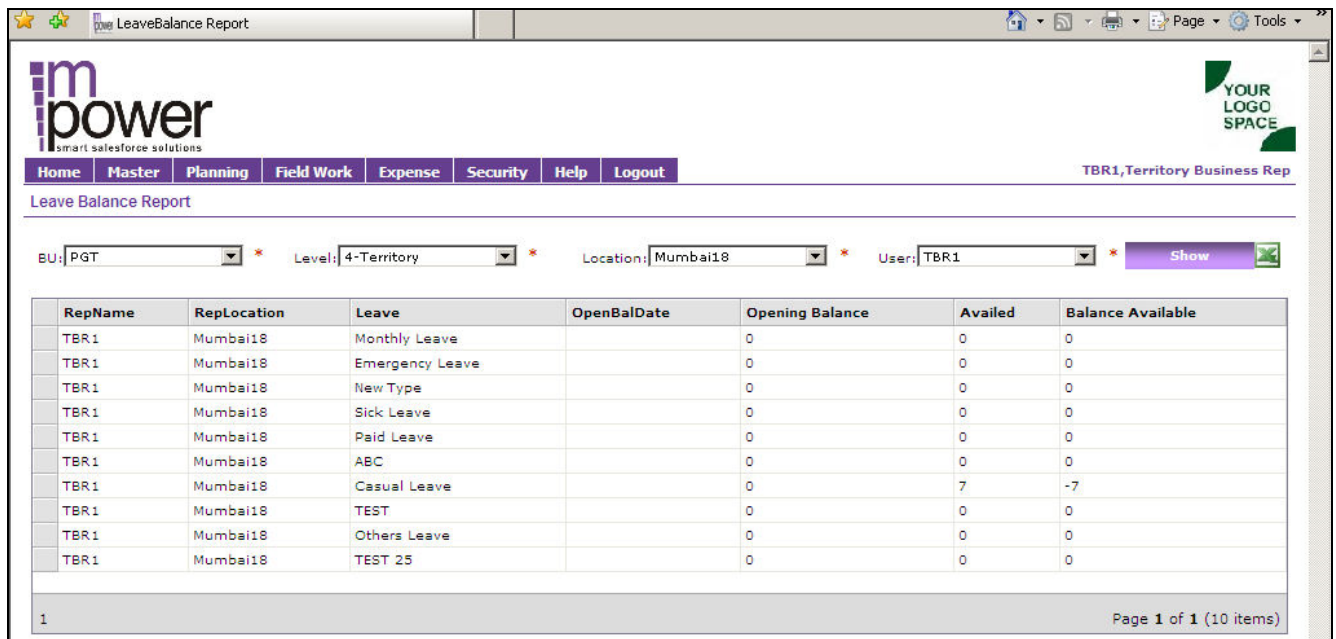
## vi. Leave Balance Report

The intension of this report is to view the leaves taken and the leave balance of the REPs during a particular period.

### Parameters:-

- BU - Name of the REP's Business unit is shown by default. This is not modifiable by REP. However it is selectable if the login is a manager.
- Level - Select the level from the list for which area the report has to be seen.
- Location - By default it is blank. Location has to be selected from a list of areas attached to the REP.
- User - Name of the REP who has logged in is shown by default. This is not modifiable. This is not

### Report-



RepName	RepLocation	Leave	OpenBalDate	Opening Balance	Availd	Balance Available
TBR1	Mumbai18	Monthly Leave		0	0	0
TBR1	Mumbai18	Emergency Leave		0	0	0
TBR1	Mumbai18	New Type		0	0	0
TBR1	Mumbai18	Sick Leave		0	0	0
TBR1	Mumbai18	Paid Leave		0	0	0
TBR1	Mumbai18	ABC		0	0	0
TBR1	Mumbai18	Casual Leave		0	7	-7
TBR1	Mumbai18	TEST		0	0	0
TBR1	Mumbai18	Others Leave		0	0	0
TBR1	Mumbai18	TEST 25		0	0	0

On clicking the link in the Month column, the list of leaves will be displayed below including the reason for taking the leave.

### List of Column Specification:

- RepName - The name of the REP selected.
- RepLcoation - The name of the Rep Location.
- Leave - The type of the leaves.
- OpenBalDate - The date on which the new balance of leave is uploaded.
- Opening Balance - The balance of the leaves.
- Availd - The count of leave taken.
- Balance Available - Total balance of leave available after the OpenBalDate.

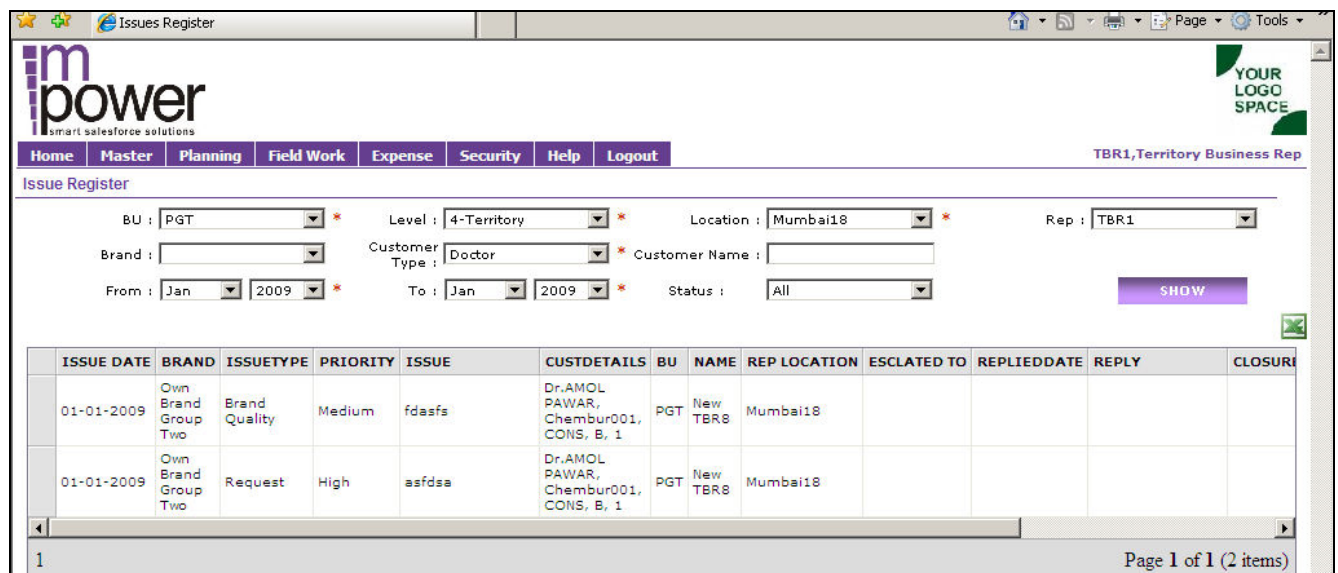
## vii. Issue Register

The use of this report is to view all the issues of the customers reported by the REP during a particular period.

### Parameters:-

- BU - Name of the REP's Business unit is shown by default.
- Level - Select the level from the list for which area the report has to be seen.
- Location - By default it is blank. Area has to be selected from a list of areas attached to the REP.
- Rep - The name of the REP selected will be displayed.
- Brand - The name of the brands will be displayed for selection.
- Customer type - The customer type i.e. doctor, chemist or stockiest
- Customer name - The name of the customer can also be typed to find the issue of that customer.
- From Date - The month from which analytics is to be viewed
- To Date - The month till which analytics is to be viewed
- Status - Status of the customer i.e. open, close and replied.

### Report-



**Issue Register**

BU : PGT \* Level : 4-Territory \* Location : Mumbai18 \* Rep : TBR1

Brand : \* Customer Type : Doctor \* Customer Name : \* From : Jan 2009 \* To : Jan 2009 \* Status : All

**SHOW**

ISSUE DATE	BRAND	ISSUETYPE	PRIORITY	ISSUE	CUSTDETAILS	BU	NAME	REP LOCATION	ESCALATED TO	REPLIEDDATE	REPLY	CLOSURE
01-01-2009	Own Brand Group Two	Brand Quality	Medium	fdasfs	Dr.AMOL PAWAR, Chembur001, CONS, B, 1	PGT	New TBR8	Mumbai18				
01-01-2009	Own Brand Group Two	Request	High	asfdsa	Dr.AMOL PAWAR, Chembur001, CONS, B, 1	PGT	New TBR8	Mumbai18				

Page 1 of 1 (2 items)

### List of Column Specification:

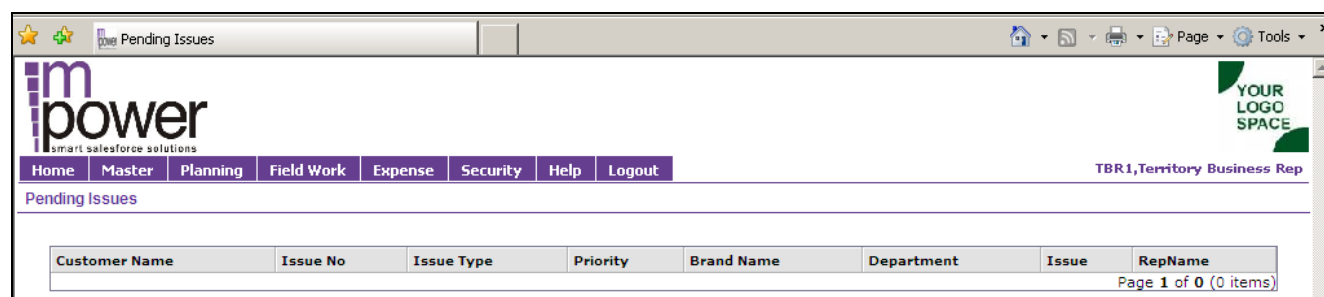
- Issue Date - The date on which the issue was reported will be displayed.
- Brand - The name of the brand against which issue is reported will be displayed.
- Issue type - The type of the issue will be displayed.
- Priority - The priority of the issue will be displayed.
- Issue - The description of the issue will be displayed.
- Customer Details - The details of the customer who reported the issue will be displayed.
- BU - The name of the BU will be displayed.
- Name - The name of the REP.

- |                            |  |
|----------------------------|--|
| i. Rep Location            | - The location of the REP.   |
| j. Escalated to escalated. | - The name and the designation of the person to whom the issue has been escalated. |
| k. Replied Date            | - The date on which the person to whom the issue has been escalated replies.       |
| l. Reply                   | - The description of the reply will be displayed.                                  |
| m. Closure Date            | - The date on which the REP closes the issue.                                      |
| n. Closing Remarks         | - The closing remarks added by the REP will be displayed.                          |
| o. Elapse Days             | - The no. of days till which the issue is opened.                                  |

## vii. Pending Issues

The use of this report is to view all the issues which are in pending state with the REP till date.

*Report-*



List of Column Specification:

- |                  |   |
|------------------|---|
| a. Customer Name | - The name of the customer will be displayed.                       |
| b. Issue No.     | - The Issue no. which is pending will be displayed.                 |
| c. Issue type    | - The type of the issue will be displayed.                          |
| d. Priority      | - The priority of the issue will be displayed.                      |
| e. Brand Name    | - The brand name will be displayed.                                 |
| f. Department    | - The department to which the issue is escalated will be displayed. |
| g. Issue         | - The description of the issue will be displayed.                   |
| h. Name          | - The name of the REP.  |

## viii. Campaign Implementation Status

The use of this report is to view all the Campaign Implementation Status.

Report-

Home

Master

Planning

Field Work

Expense

Broadcast

Security

Help

Logout

Admin,Administrator

Campaign Implementation Status

Grouped :

Region Wise

\*

Campaign :

Campaign2

\*

Show

GroupWise Consolidated Summary

BU	Level-Location	User	Total Reps	100%	75-99%	50-74%	25-49%	24% Or Less	Nil	Business Generated On Campaign Days	Overall Business Generated	Incremental Business	%Reps that have assigned	%Reps that have started	%Reps not sta campai
PGT	Region-Chennai	Rajakumar G	47	0	0	0	0	0	47				0	0	100
PGT	Region-Lucknow	Kunal Moltra	40	0	0	0	0	0	40				0	0	100
PGT	Region-Hyderabad	Srinivasa Sastry	38	0	0	0	0	0	38				0	0	100
PGT	Region-Kolkata	New RBM	51	0	0	0	0	0	51				0	1.96	98.04
PGT	Region-Delhi	Jitender Thukral	44	0	0	0	0	0	44				0	0	100
PGT	Region-Mumbai	Nilesh Barbade	48	0	0	0	0	0	48				0	0	100
PGT	Region-Indore	Pratibha RBM	29	0	0	0	0	0	29				0	0	100

1

Page 1 of 1 (7 items)

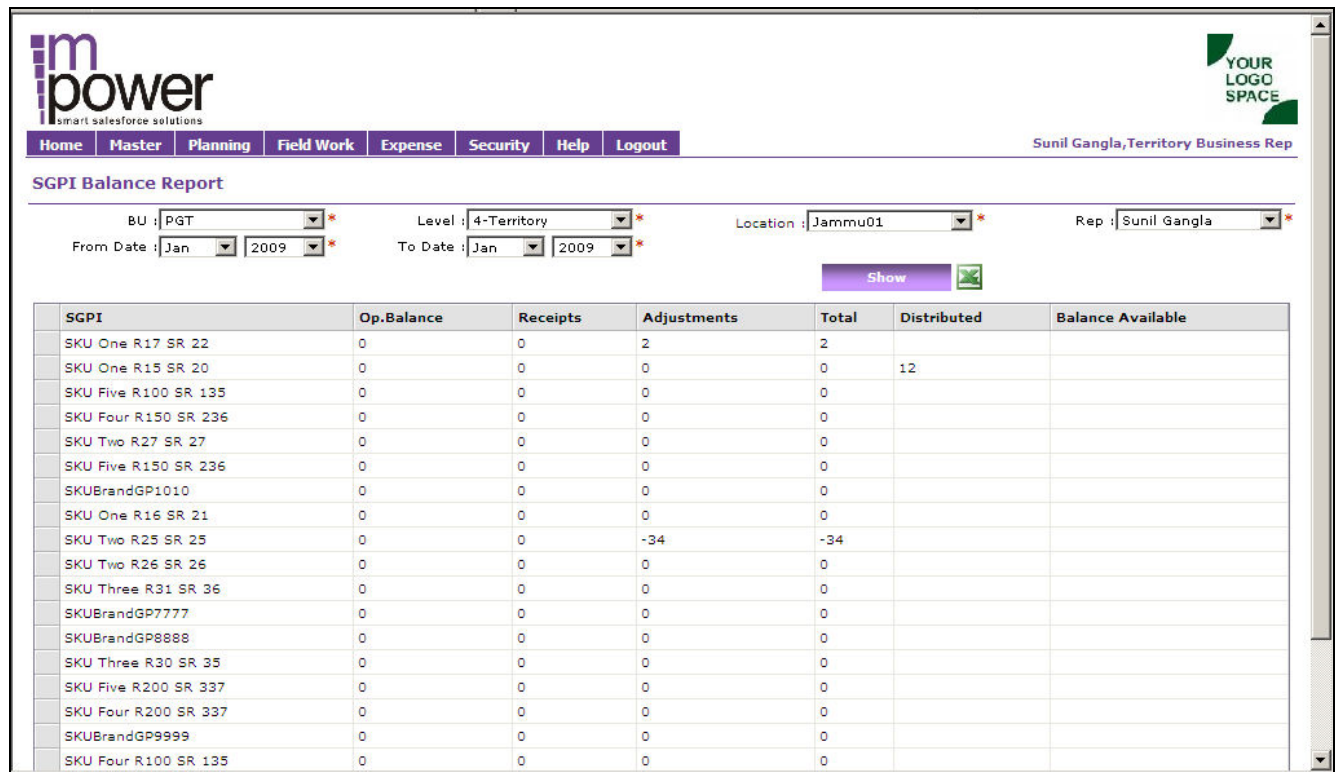
List of Column Specification:

- BU - The name of the BU.
- Level-Location. - The level and location of the user will be displayed.
- User - The name of the user will be displayed.
- Total REPs - Total count of REPs who have been assigned the campaign will be displayed.
- Coverage - Count of REPs as per their % coverage of the campaign will be displayed in the slabs of coverage i.e. 100%, 75-90%, 50-74%, 25-49%, 24% or less and Nil.
- Business Generated on Campaign Days – Business Generated on Campaign Days in value will be displayed.
- Overall Business Generated - Overall Business Generated in values will be displayed.

- h. Incremental Business - Incremental Business in values will be displayed.
- i. % Reps that have assigned
- j. % Reps that have started campaign
- k. % Reps that have not started campaign

## ix. SGPI Balance Report

This report provides the details of the Samples and Gifts and Promotional Inputs for a particular period of time.



SGPI	Op.Balance	Receipts	Adjustments	Total	Distributed	Balance Available
SKU One R17 SR 22	0	0	2	2		
SKU One R15 SR 20	0	0	0	0	12	
SKU Five R100 SR 135	0	0	0	0		
SKU Four R150 SR 236	0	0	0	0		
SKU Two R27 SR 27	0	0	0	0		
SKU Five R150 SR 236	0	0	0	0		
SKUBrandGP1010	0	0	0	0		
SKU One R16 SR 21	0	0	0	0		
SKU Two R25 SR 25	0	0	-34	-34		
SKU Two R26 SR 26	0	0	0	0		
SKU Three R31 SR 36	0	0	0	0		
SKUBrandGP7777	0	0	0	0		
SKUBrandGP8888	0	0	0	0		
SKU Three R30 SR 35	0	0	0	0		
SKU Five R200 SR 337	0	0	0	0		
SKU Four R200 SR 337	0	0	0	0		
SKUBrandGP9999	0	0	0	0		
SKU Four R100 SR 135	0	0	0	0		

List of Column Specification:

1. SGPI - The names of all the Samples, Gifts and Promotional Inputs.
2. Op. Balance - The Opening balance of the SGPI will be displayed.
3. Receipts - Any SGPI received by the user will be displayed.
4. Adjustment - The additions or returns of samples will be displayed.
5. Total - The total no. of SGPI with the user will be displayed.
6. Distributed - The no. of SGPI distributed to the customers will be displayed.
7. Balance available - The balance available with the user will be displayed.

## **Masters**

### **a) Request for addition or deletion of Customer**

**Getting there:** Login -> Select Masters menu option -> Select addition / deletion option

#### **i. Post a request for addition of doctor**

The doctor addition request will have a provision to add the key fields of the doctor, viz. Name, Short Name, town, patch, specialty and qualification. Open the doctor addition screen which will be in ADD mode. On save of the request the entry will be available to the ABM and Admin for approval of the Customer. The details captured for add requests are Name, Location and specialty details.

#### **ii. Post a request for addition of chemist / stockist**

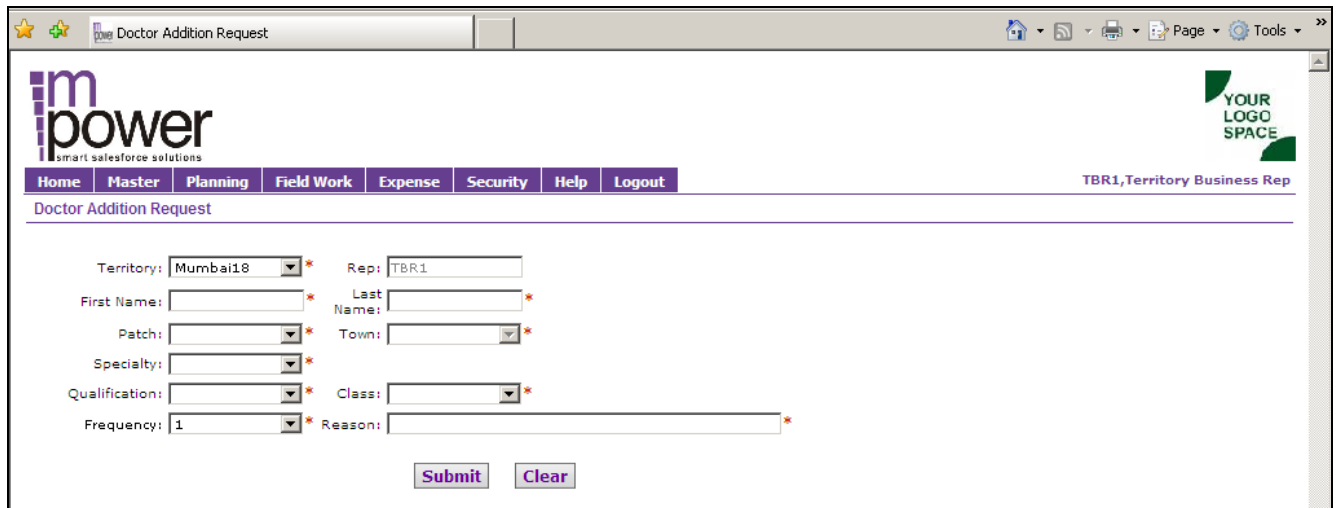
The chemist / stockiest addition request will have a provision to add the key fields of the chemist and stockiest viz. name, short name, town and patch. Open the chemist or stockiest addition screen which will be in ADD mode by default. On save of the request the entry will be available to the ABM and Admin for approval of the Customer.

#### **iii. Post a request for modify or deletion of Customer**

Open Delete or modify request screen, and select the Customer type and Customer name from a list. The list will be restricted to parties attached to the REP. On SAVE the Customer delete or modify request will be visible to the ABM for approval.

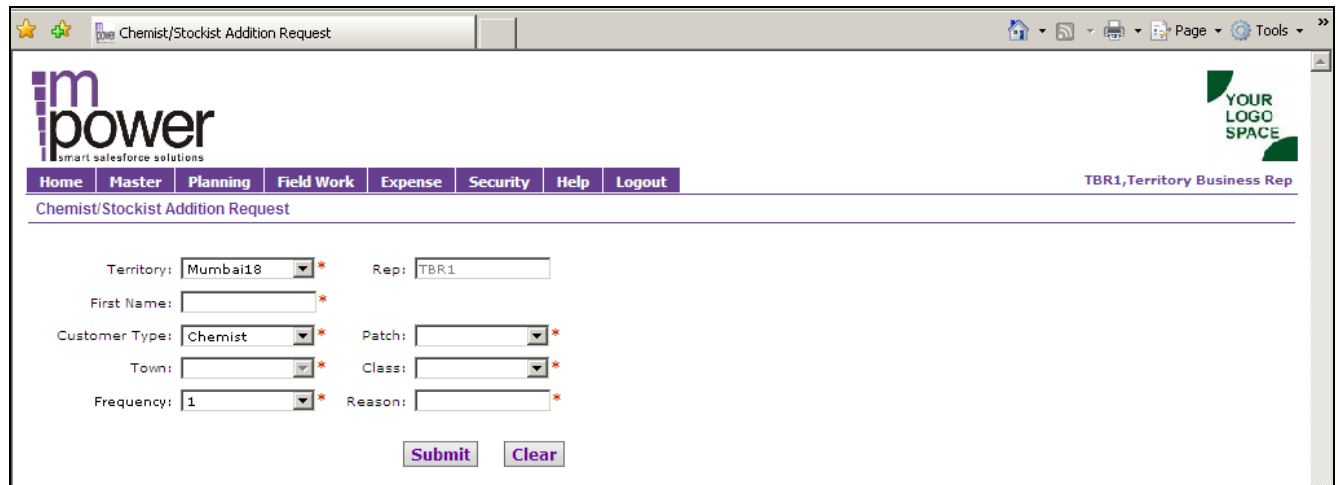


## ■ Doctor add Request



1. Add request:
  - a) Territory
    - Territory to which the REP is attached will be displayed.
  - b) Rep
    - The name of the REP under the territory will be displayed
  - c) First Name
    - Free Text entry.
  - d) Last Name
    - Free Text entry.
  - e) Patch
    - Patch to which the Customer is to be configured. Patches belonging to the REP will only be shown.
  - f) Town
    - town to which the Customer is attached. The list of town configured to the REP will only be shown.
  - g) Specialty
    - Specialty of the doctor being requested for addition
  - h) Qualification
    - Qualification to be selected from the drop down.
  - i) Class
    - Class of the doctor being requested for addition
  - j) Frequency
    - Frequency of the doctor being requested for addition
  - k) Reason
    - Remarks to indicate reason for adding the Customer.

## Chemist / Stockist add Request



The screenshot shows a web browser window with the title "Chemist/Stockist Addition Request". The page features the m power logo and a navigation menu with links: Home, Master, Planning, Field Work, Expense, Security, Help, and Logout. A user profile "TBR1, Territory Business Rep" is visible in the top right. The main form contains the following fields:

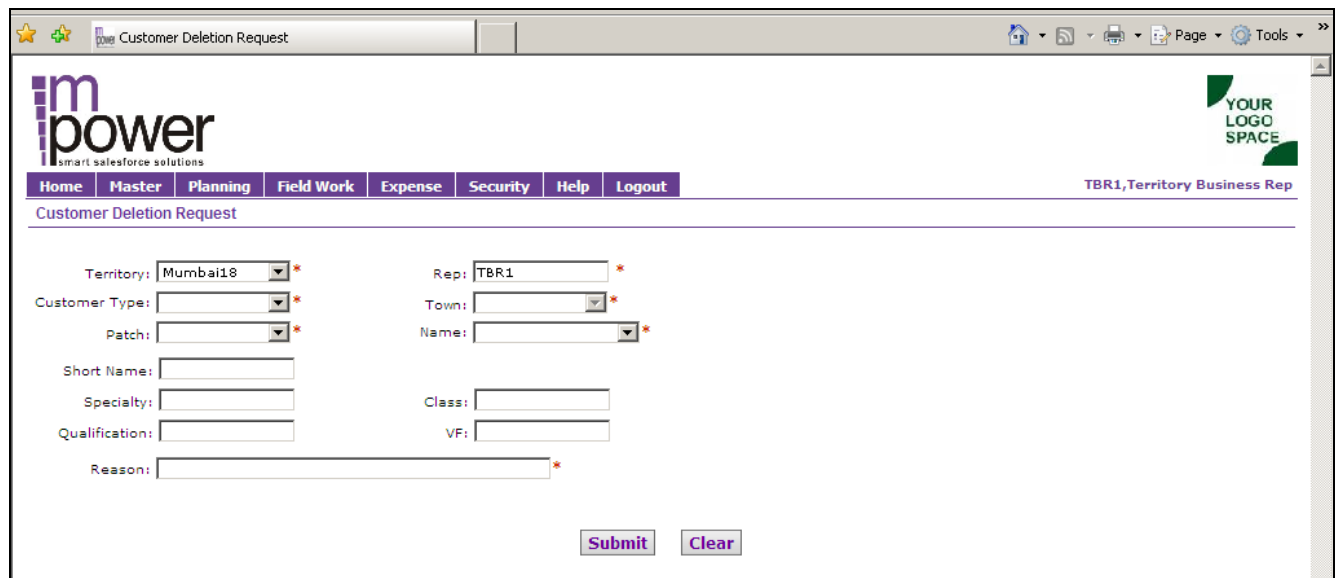
- Territory:  \*
- Rep:
- First Name:
- Customer Type:  \*
- Patch:
- Town:
- Class:
- Frequency:  \*
- Reason:

At the bottom of the form are two buttons: "Submit" and "Clear".

### 1. Add request:

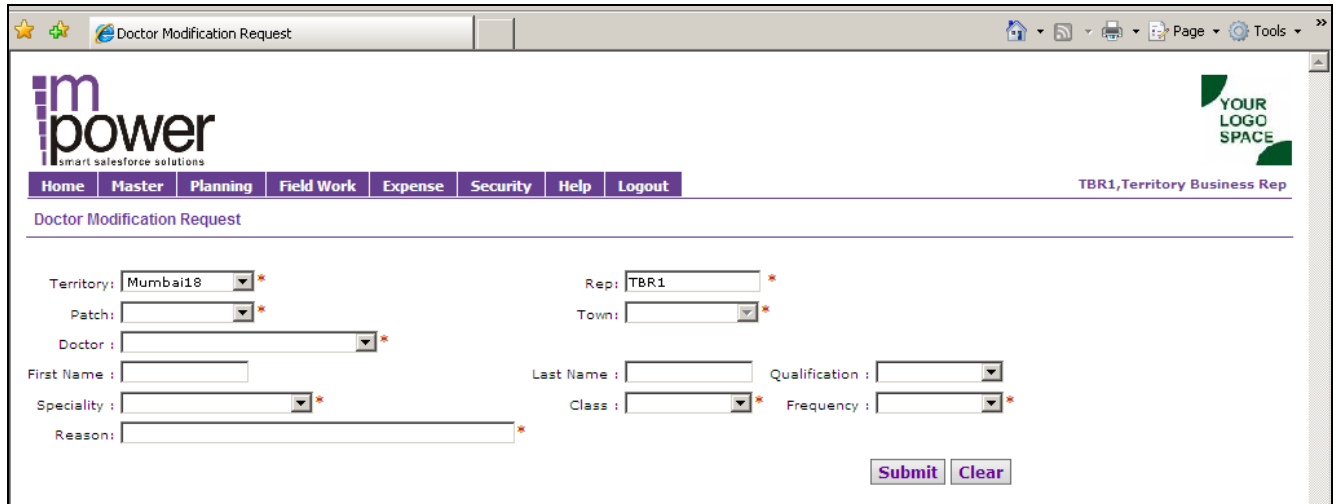
- |                  |  |
|------------------|--|
| a) Territory     | – Territory to which the REP is attached will be displayed.  |
| b) REP           | - The name of the REP under the territory will be displayed.   |
| c) First Name    | - Free Text entry.   |
| d) Customer Type | – Chemist or stockiest   |
| e) Patch         | – Patch to which the Customer is to be configured. Patches belonging to the REP will only be shown.  |
| f) Town          | – town to which the Customer is attached. The list of town configured to the REP will only be shown. |
| g) Class         | - Class of the doctor being requested for addition   |
| h) Frequency     | - Frequency of the doctor being requested for addition   |
| i) Reason        | – Remarks to indicate reason for adding the Customer.  |

## ▪ Doctor Delete Request



- |                         |  |
|-------------------------|--|
| 1. Territory            | - Territory to which the REP is attached will be displayed.                  |
| 2. Rep                  | - The name of the REP under the territory will be displayed                  |
| 3. Customer type        | - Filter to restrict Customer list to the selected type.                     |
| 4. Town                 | - Town to which the Customer is attached. The list of town configured to the |
| 5. Patch                | - Patch to which the Customer is to be configured. Patches belonging to the  |
| REP will only be shown. |  |
| 6. Name                 | - The Name of the customer.  |
| 7. Short Name           | - The Short Name of the customer.  |
| 8. Specialty            | - Specialty of the doctor being requested for addition                       |
| 9. Class                | - Class of the doctor being requested for addition                           |
| 10. Qualification       | - Qualification to be selected from the drop down.                           |
| 11. Frequency           | - Frequency of the doctor being requested for addition                       |
| 12. Reason              | - Remarks to indicate reason for adding the Customer.                        |

## ▪ Doctor Modification Request



The screenshot shows a web browser window titled "Doctor Modification Request". The page features the "m power" logo and a navigation menu with links: Home, Master, Planning, Field Work, Expense, Security, Help, and Logout. A user identifier "TBR1, Territory Business Rep" is displayed in the top right. The form itself contains several input fields with red asterisks indicating required fields:

- Territory: Mumbai18 \*
- Patch: \*
- Rep: TBR1 \*
- Town: \*
- Doctor: \*
- First Name:
- Last Name:
- Qualification:
- Speciality: \*
- Class: \*
- Frequency: \*
- Reason: \*

At the bottom right of the form are "Submit" and "Clear" buttons.

1. Modify Request:
  - a. Area – Towns attached to the REP.
  - b. Doctor – List of doctors configured for the REP will be shown for selection
  - c. Name – First, Last names – This is a display only field.
  - d. Qualification – Doctor Qualification is a display only field.
  - e. Specialty – Doctors specialty to be selected from list
  - f. Class – Doctors class to be selected from list
  - g. Frequency – Visit frequency to be selected from list

## b) View Master Reports

### i. **Area Customer Summary**

#### *Parameters:-*

- a. BU – Name of the REP's Business unit is shown by default. This is not modifiable by REP. However it is selectable if the login is a manager.
- b. Organizational tree – Complete organizational hierarchy is displayed for selection

#### *Report:-*

The report shows the total count of customers under any level in the organizational hierarchy;

- a. Level – Name of the REP's Business unit is shown by default. This is not modifiable by REP. However it is selectable if the login is a manager.
- b. Doctors – Total count of doctors under each successive level under the selected level of the organizational tree.
  - i. Specialty wise class wise breakup of total count of doctors.
- c. Chemists – Total count of chemists under each successive level under the selected level of the organizational tree
  - i. Selecting any level will show the list of all chemists.
- d. Stockist – Total count of stockist under each successive level under the selected level of the organizational tree
  - i. Selecting any level will show the list of all chemists.

## ii. Doctor List

### Parameters:-

- |                    |   |
|--------------------|---|
| a. BU              | – Name of the REP's Business unit is shown by default. This is not modifiable by REP. However it is selectable if the login is a manager. |
| b. Level           | – Select the level from the list for which area the report has to be seen.  |
| c. Location        | – By default it is blank. Area has to be selected from a list attached.   |
| d. REP             | – Name of the REP to be selected for whom the reports are to be viewed.   |
| e. Specialty       | – Selection of specialty from a list.   |
| f. Class           | – Selection of doctor class   |
| g. Visit Frequency | – Input of doctor visit frequency.  |
| h. Doctor Name     | – Input name of doctor to search  |

### Report:-

The report shows all doctors for the selected parameters;

- |                      |  |
|----------------------|--|
| a. Doctor data       | <p>– Following data is shown for doctors matching the selected parameters;</p> <ul style="list-style-type: none"> <li>▪ Name</li> <li>▪ Doctor Short Name</li> <li>▪ Qualification</li> <li>▪ Registration No.</li> <li>▪ DOB</li> <li>▪ DOA</li> <li>▪ Town</li> <li>▪ Specialty</li> <li>▪ Class</li> <li>▪ Visit Frequency</li> <li>▪ No of patients per day</li> <li>▪ Best time to meet</li> <li>▪ Address</li> <li>▪ City</li> <li>▪ State</li> <li>▪ Pin</li> <li>▪ Phone</li> <li>▪ Email</li> </ul> |
| b. REP Details       | <p>– details of REP attached to the doctor.</p> <ul style="list-style-type: none"> <li>▪ Business unit</li> <li>▪ Rep Name</li> <li>▪ Reps HQ</li> <li>▪ Last Visit Date by the REP</li> </ul>   |
| c. Own PV            | – PV (Own Brands) recorded for Last 30 days from the last visit date   |
| d. Total PV          | – PV (Own Brands + Comp Brands) recorded for Last 30 days from the last visit date   |
| e. Date of addition  |  |
| f. Last updated date | – Last date when any update was made on the doctor   |

### iii. Chemist List

#### Parameters:-

- a. BU – Name of the REP's Business unit is shown by default. This is not modifiable by REP. However it is selectable if the login is a manager.
- b. Level – Select the level from the list for which area the report has to be seen.
- c. Location – By default it is blank. Area has to be selected from a list attached.
- d. REP – Name of the REP to be selected for whom the reports are to be viewed.

#### Report:-

The report shows all chemists for the selected parameters;

- a. Chemist data – Following data is shown for chemists matching the selected parameters;
  - Name
  - Chemist Short Name
  - Contact Person
  - Address
  - City
  - State
  - Pin
  - Phone
  - Email
  - Town
- b. REP Details – details of REP attached to the chemist.
  - Business unit
  - Rep Name
  - Reps HQ
  - Last Visit Date by the REP
- c. BV – BV (Business value) is Based on the prescription audit recorded for all doctors on the last visit date; total value of business done in a month
- d. Last POB Value – Last POB value taken from the chemist
- e. Date of addition
- f. Last updated date – Last date when any update was made on the Chemist

#### iv. Stockist List

##### *Parameters:-*

- a. BU – Name of the REP's Business unit is shown by default. This is not modifiable by REP. However it is selectable if the login is a manager.
- b. Level – Select the level from the list for which area the report has to be seen.
- c. Location – By default it is blank. Area has to be selected from a list attached.
- d. REP – Name of the REP to be selected for whom the reports are to be viewed.

##### *Report:-*

The report shows all chemists for the selected parameters;

- a. Stockiest data – Following data is shown for stockiest matching the selected parameters;
  - a. Name
  - b. Stockist Short Name
  - c. Contact Person
  - d. Address
  - e. City
  - f. State
  - g. Pin
  - h. Phone
  - i. Email
  - j. Town
- b. REP Details – details of REP attached to the chemist.
  - a. Business unit
  - b. Rep Name
  - c. Reps HQ
  - d. Last Visit Date by the REP
- c. Date of addition
- d. Last updated date – Last date when any update was made on the Stockiest



## Conclusion

### 1. Error Messages & Explanation

**1. There are No more Record to view.**

Reason: Whenever you are viewing already entered data for daily entry and there is no more record, you will get this message.

**2. Network is not available try after some time.**

Reason: If internet is not available then such a message can rise.