

Policy & Procedures	
Document Name	Upgraded Report Dispatch Process Flow
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Introduction

The report dispatch process is a crucial aspect of operations, particularly within the microbiology department. Accurate and timely report delivery ensures that critical information is communicated efficiently to relevant stakeholders. In this document, we will outline the steps involved in dispatching reports using both the CRM and Software X, highlighting the key differences in workflows and the role of software in microbiology processes.

Objective

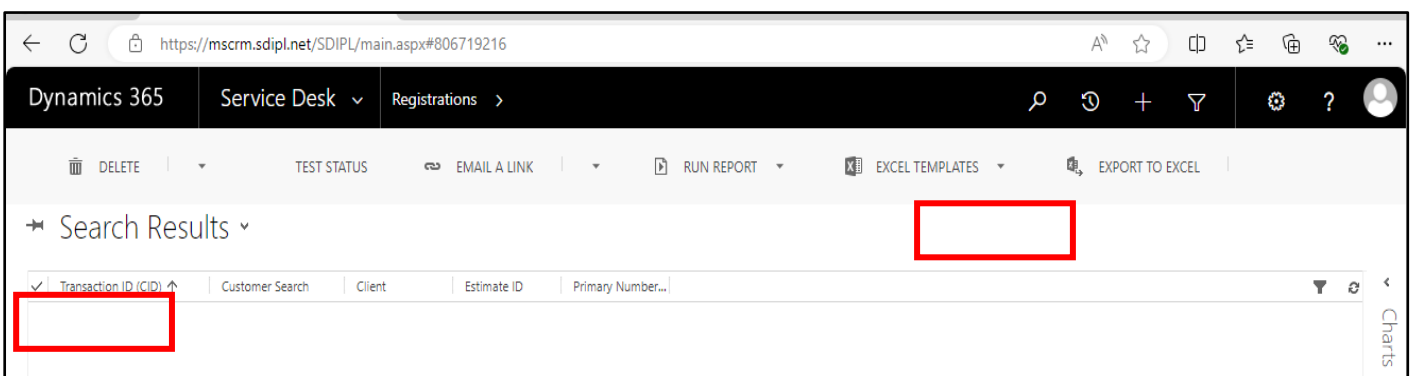
The objective of this document is to provide a clear and concise guide to the report dispatch process in both CRM and Software X. This includes step-by-step instructions for each system and an explanation of how the report generation and opening processes differ between the two. By the end of this document, readers should understand how to navigate both systems effectively and dispatch reports with accuracy and speed.

Report Dispatch Process in CRM

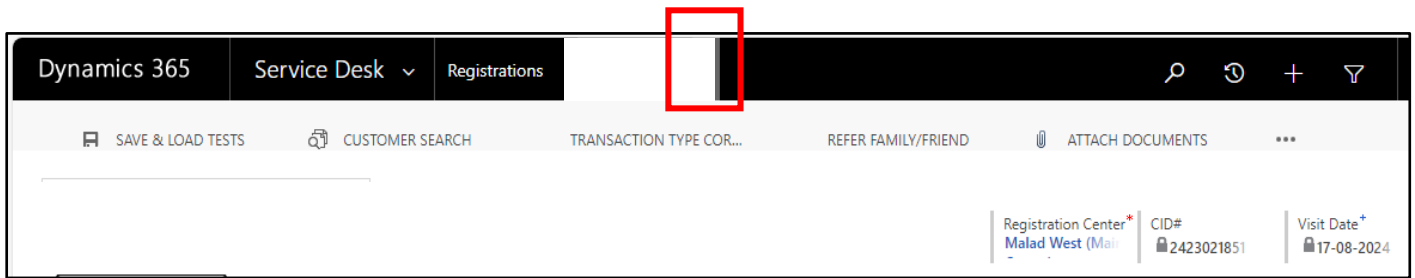
The CRM system requires several manual steps to dispatch a report.

Below is the standard workflow:

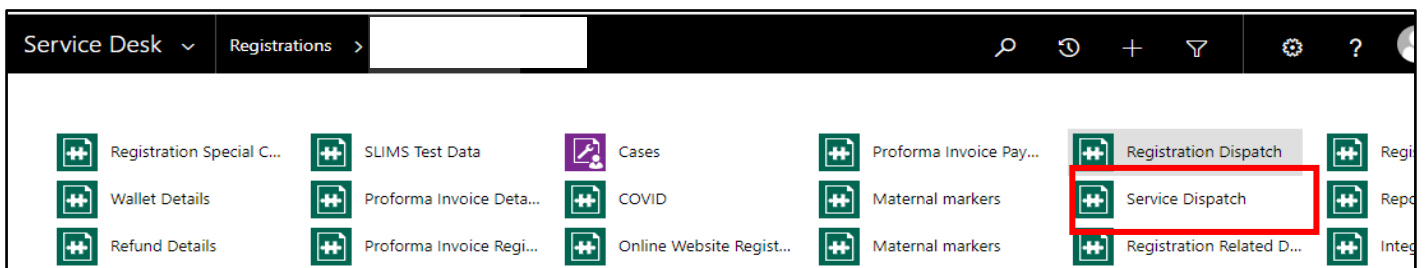
- 1) **Enter the Registration No./CID:** Begin by entering the registration number or CID of the customer.
- 2) **Search for the Customer:** Use the search function to locate the customer based on the entered information.



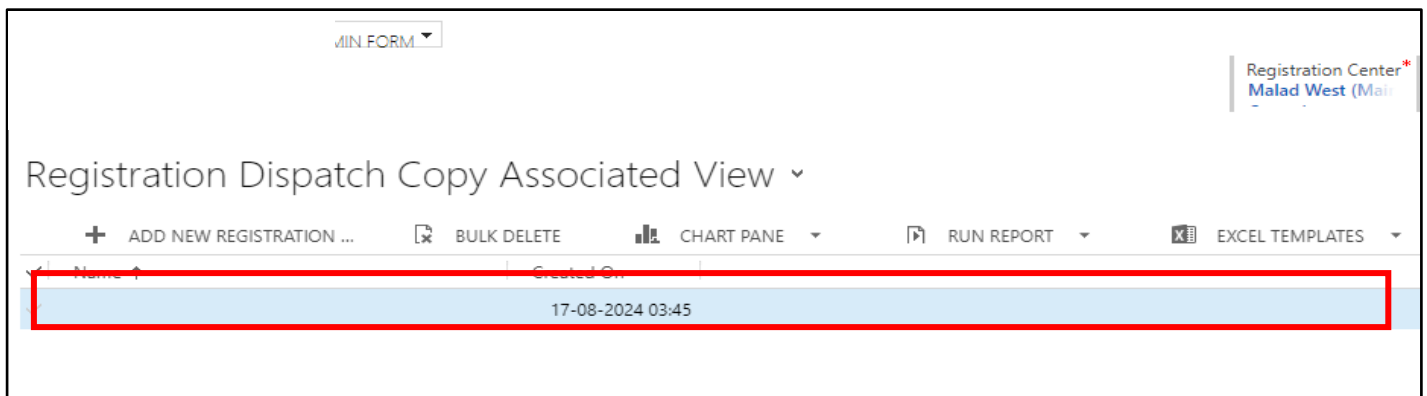
- 3) **Click on the Down Arrow:** After the customer is located, click on the down arrow to view more options.



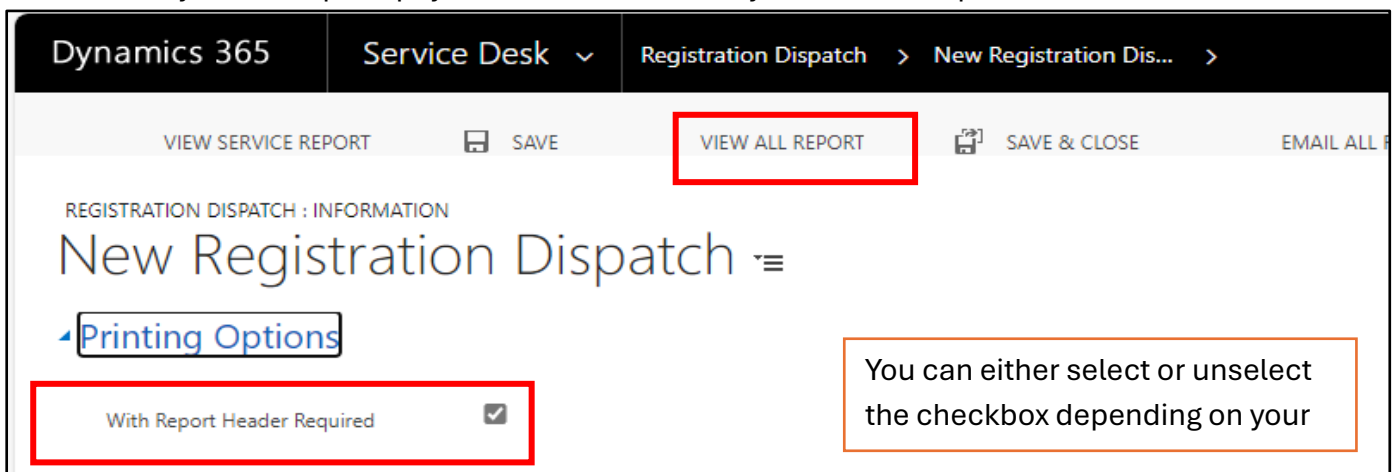
- 4) **Click on Registration Dispatch:** Select the "Registration Dispatch" option from the menu.



- 5) **Click on the Blank Row Twice:** Locate the blank row corresponding to the customer's record and click it twice to open a new tab.

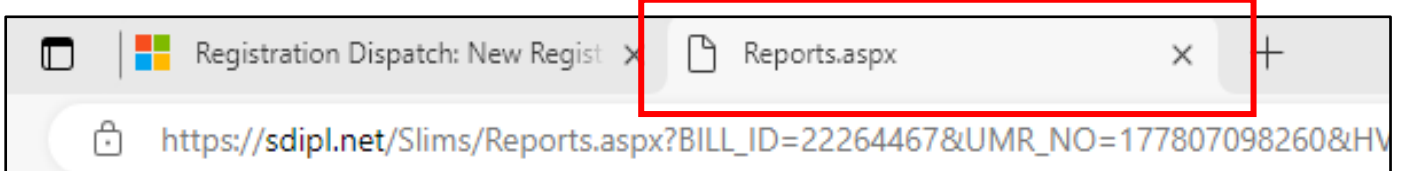


- 6) **Open New Tab:** The system will automatically open a new tab.
 7) **Click on View All Reports:** In the new tab, click on the "View All Reports" option. At this point, the system will prompt you to choose whether you want the report with or without the header.



With Report Header Required ☐

- 8) **Select Report Option:** Choose either "With Header" or "Without Header," and proceed with viewing the report. It will Popup one window at a time based on the with or without header selection.



What is Software X?

Software X is specialized software used by the microbiology department to manage microbiology-specific processes. It facilitates the streamlined generation and dispatch of microbiological reports and provides enhanced functionality to meet the unique needs of the department.

Report Dispatch Process in

Unlike CRM, Software X automates several steps in the report dispatch process, making it faster and more efficient. Below is the workflow:

1. **Select Report Type:** When opening a report in, the user first needs to select the type of report they want. The options are "With Header" or "Without Header."
2. **Click on View All Reports:** After selecting the report type, click on "View All Reports."
3. **Automatic Tab Generation:** Unlike CRM, where you manually open tabs, will automatically open two different tabs. One tab will display the report with the header, and the other tab will display the report without the header.

