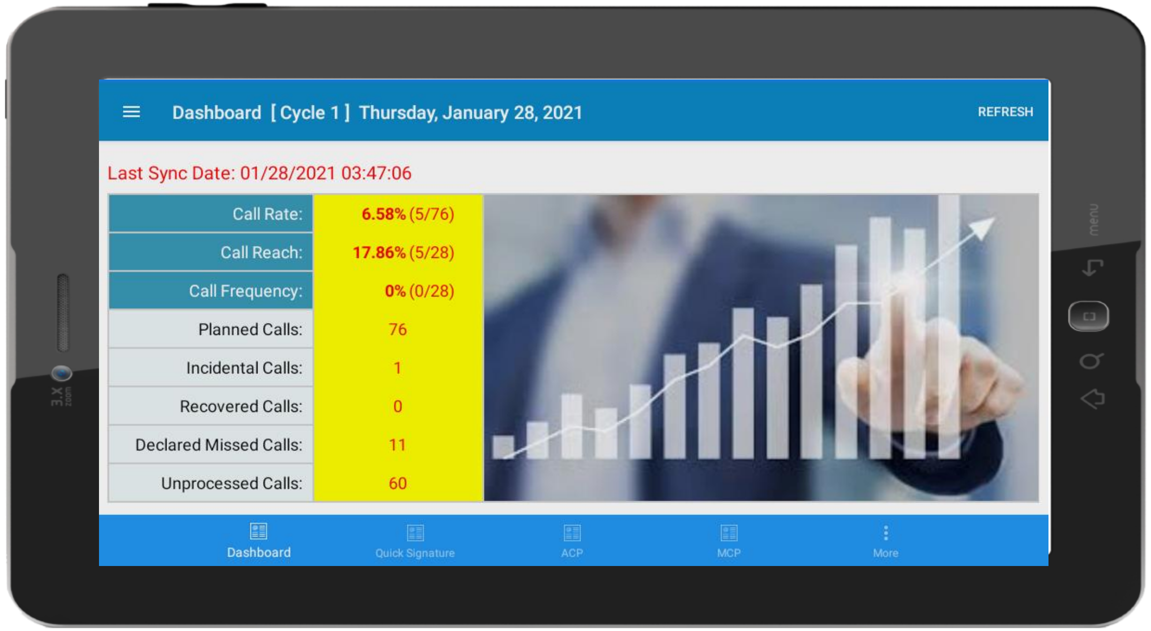

Simple SFA User Guide

Created by: Training Team

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Purpose

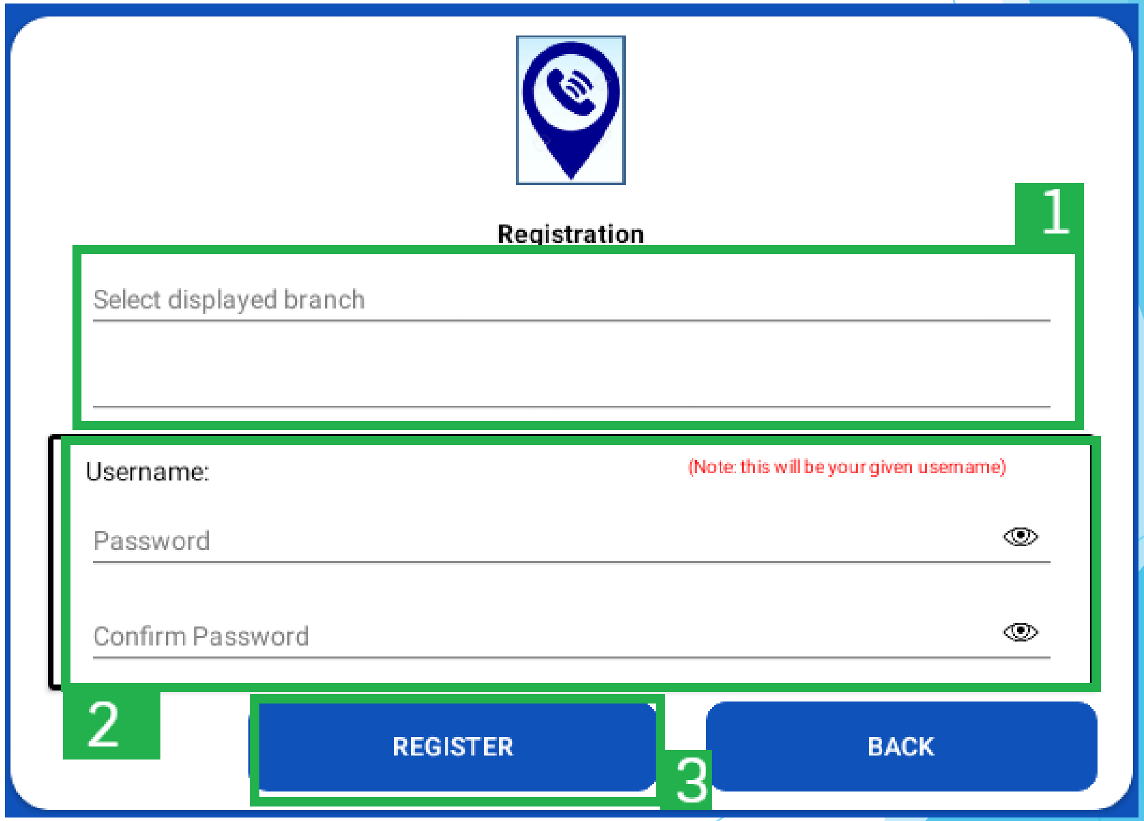
- The Simple SFA User Guide contains all essential information on how to make full use of the mobile application.
- This Guide includes images, descriptions and step-by-step procedures that a Simple SFA user can follow on how to operate the application and use it in their work.

Register

- In the login page tap the registration text.

1. Select your desired branch and desired warehouse
2. Fill in the password and confirm password.
3. Tap register

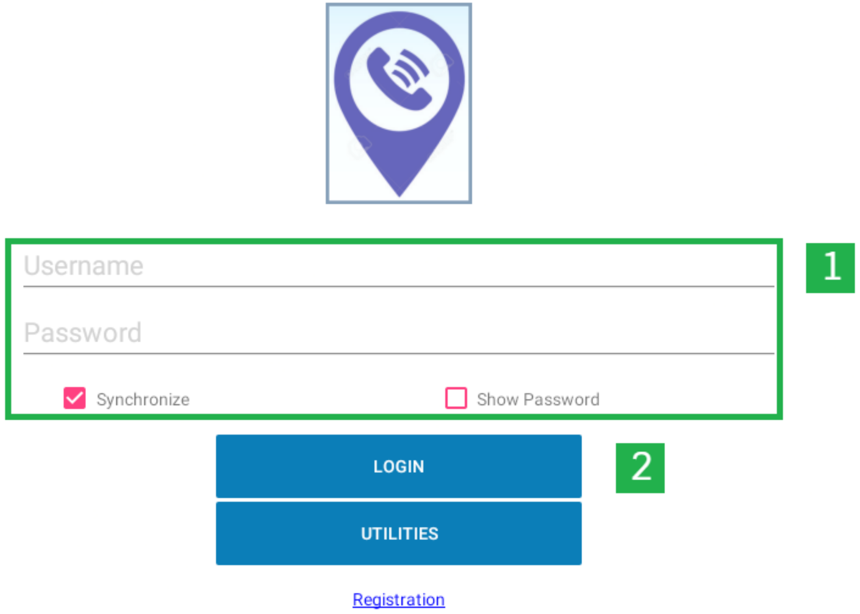
Note:
The application will give you a permanent username.



Log in

Follow these steps to Log In.

1. Type in the username, password.
2. Tap the Login Button.



Note:

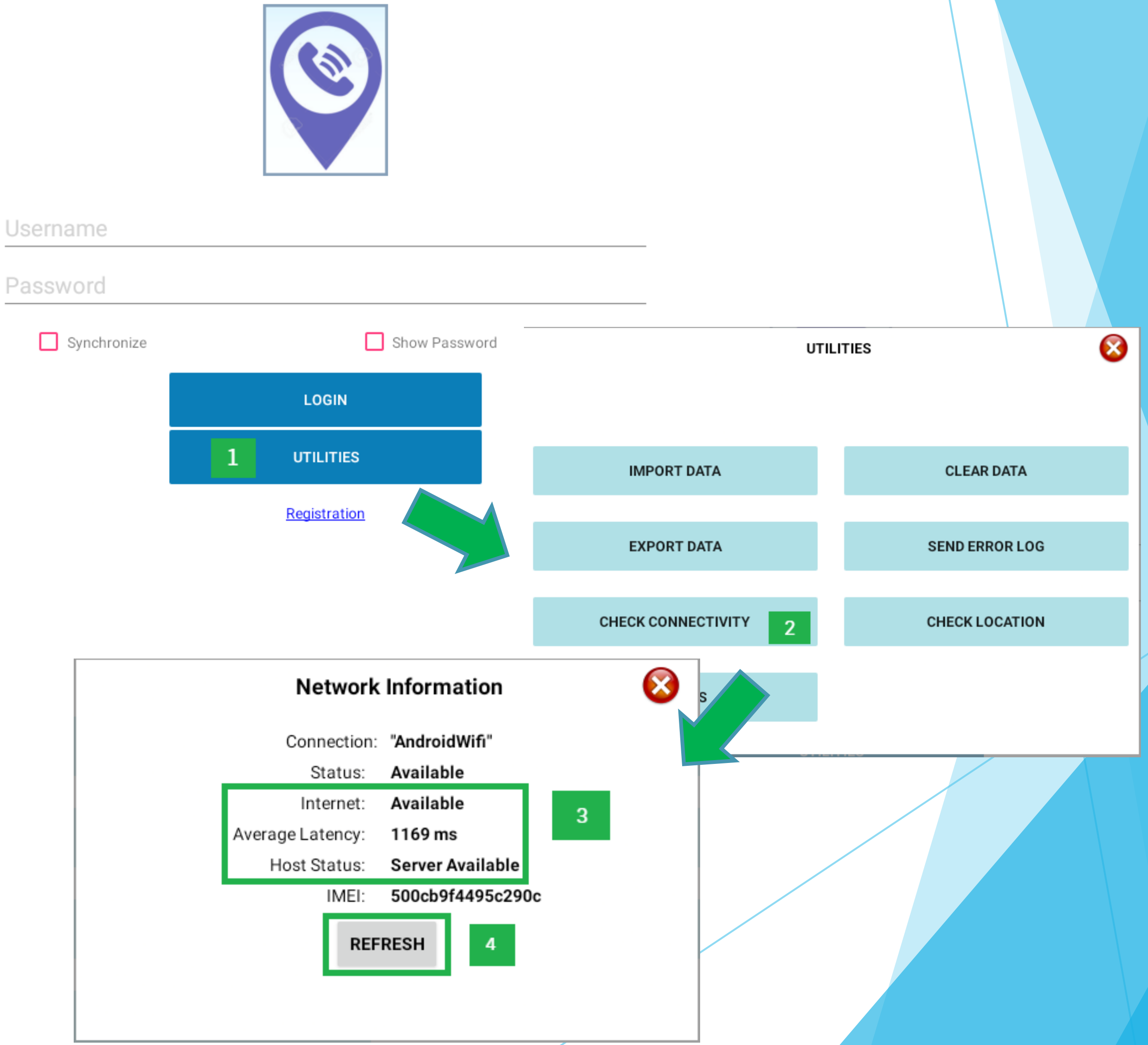
- After the initial log in, your username will be **locked in**.
- Sharing of device is not possible.

In case you cannot Login

Option 1. Check the Internet Connection

1. From the Log In screen, tap the **Utilities button**.
2. Tap the **Check Connectivity button**.
3. Check if there is an **available internet**, the **average latency** and **Host Status**.
4. Look for a better internet spot and tap the **Refresh button**.

Note:
The lower the average latency, the faster the internet speed.



In case you cannot Login

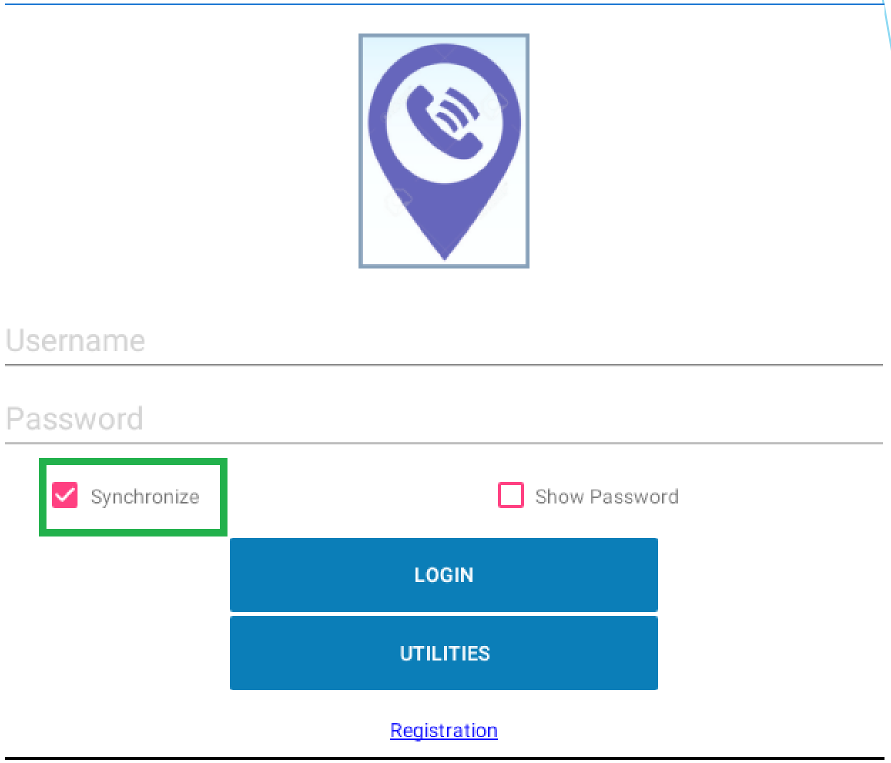
Check what Log In mode to perform.

Online Mode Login

1. Has good internet connection.
2. Synchronizing of database upon log in is possible.

Offline Mode login

1. Has none or poor internet connection.
2. Synchronizing of database is not advisable and will take longer.



Note:
It is advised to **uncheck the Synchronized box** during Offline Mode Login.

In case you cannot Login

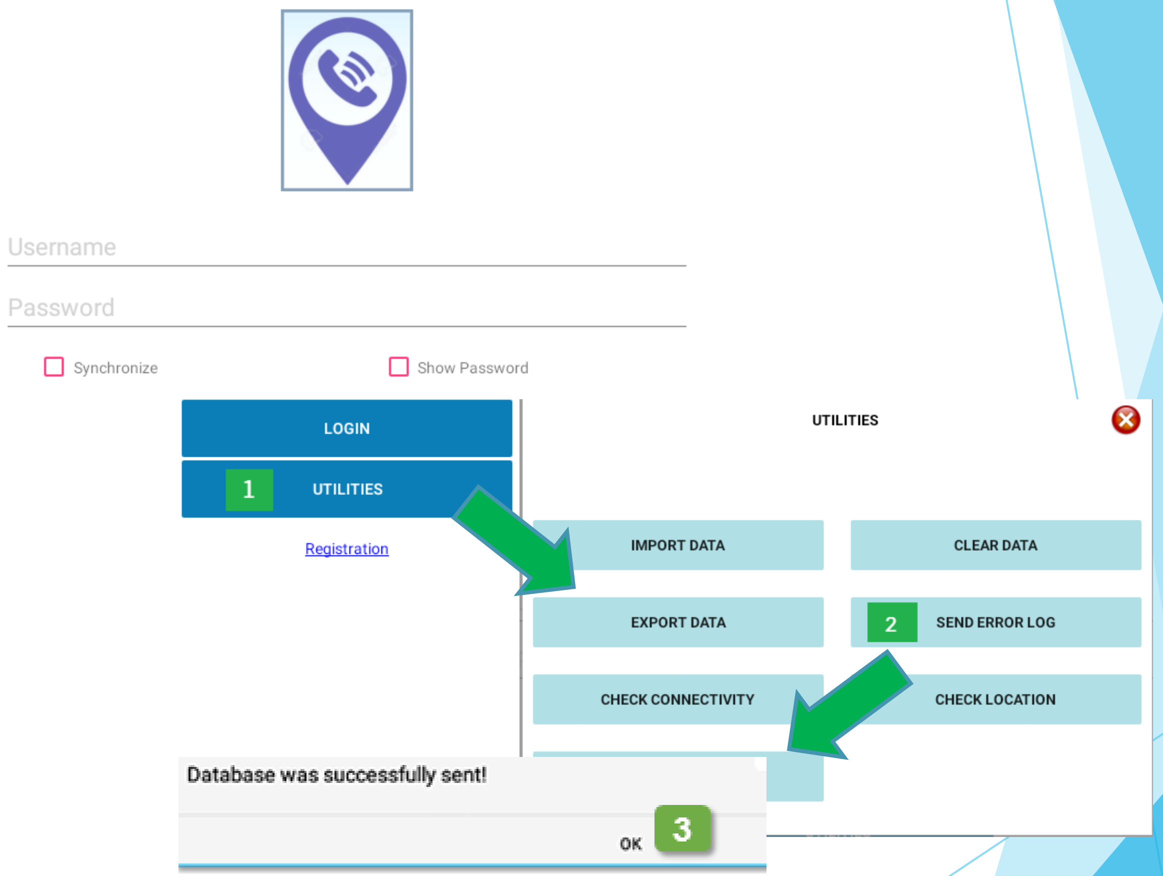
Option 2. Send the Error Log to the Support Team.

1. Tap the **Utilities button** in the Log in screen.

2. Click **Send Error Log**.

The database will be automatically sent to the Support Team.

3. Tap the **OK Button.**



In case you cannot Login

Operation 3. Send the database to the Support Team via e-mail.

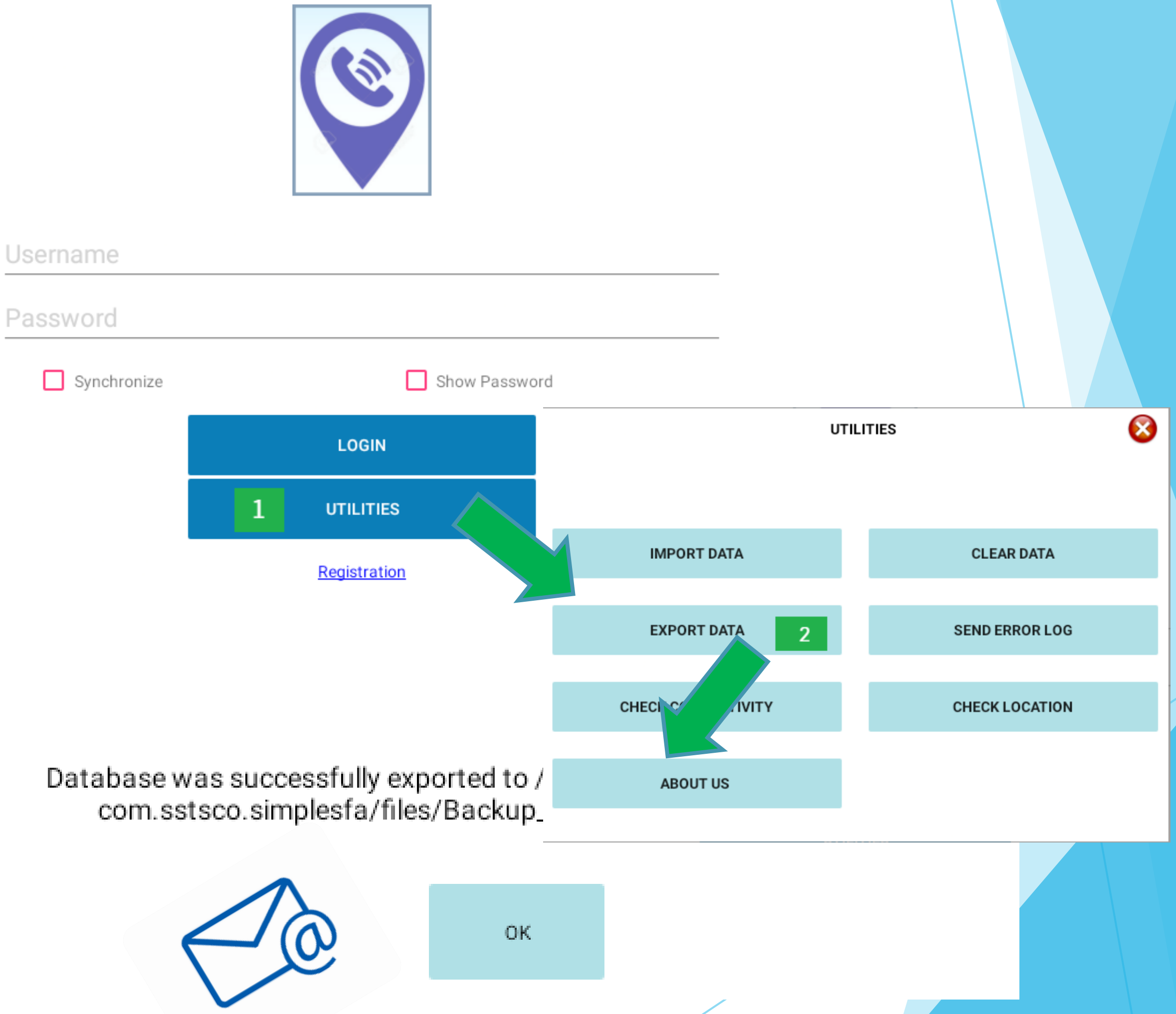
1. Tap the **Utilities button** in the Log in screen

2. Click **Export Database**.

The database will be exported to your device.

3. Attach the database in the e-mail and send to the Support Team.

Note:
Follow this option if suggested by the Support Team.



Dashboard Module

Call Rate, Call Reach and Call Frequency

Call Rate

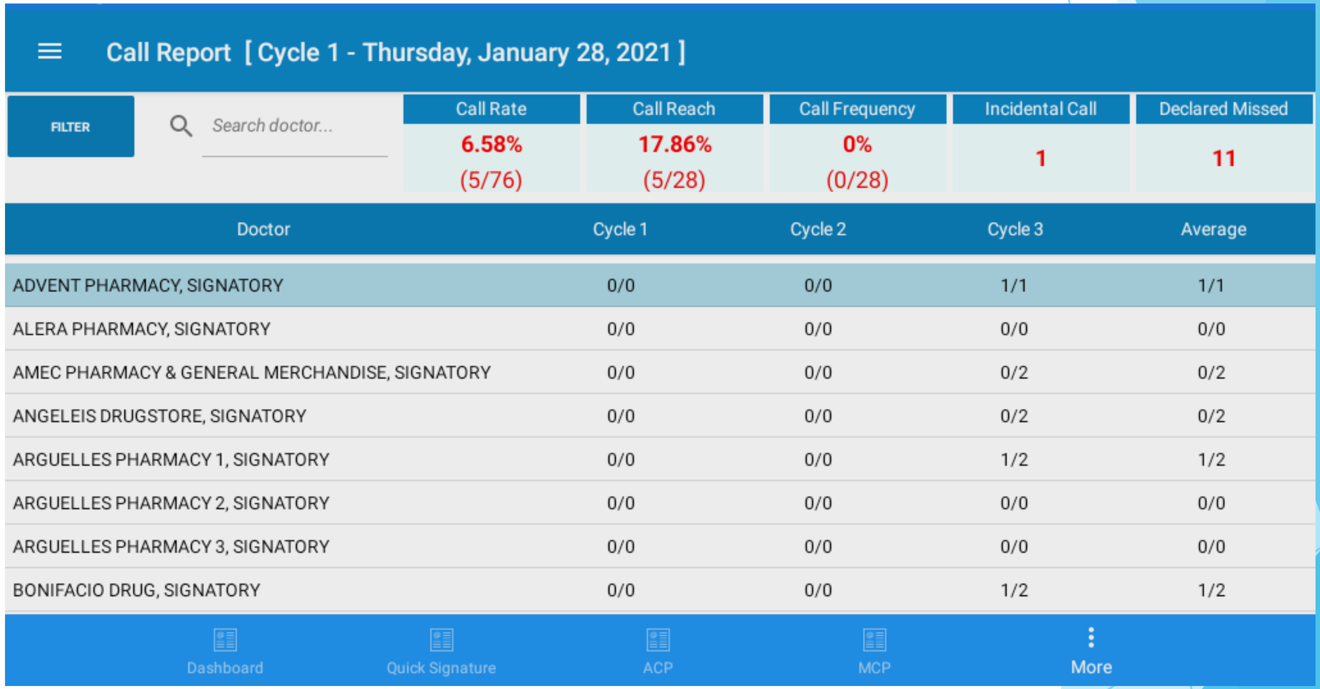
$$= \frac{\text{Total actual calls made}}{\text{Total target calls for the cycle}}$$

Call Reach

$$= \frac{\text{Total number of unique customer calls made}}{\text{Total customer planned in MCP}}$$

Call Frequency

$$= \frac{\text{Total completed frequency per customer classification}}{\text{Total customer planned in MCP}}$$



Call Rate	Call Reach	Call Frequency	Incidental Call	Declared Missed
6.58% (5/76)	17.86% (5/28)	0% (0/28)	1	11

Doctor	Cycle 1	Cycle 2	Cycle 3	Average
ADVENT PHARMACY, SIGNATORY	0/0	0/0	1/1	1/1
ALERA PHARMACY, SIGNATORY	0/0	0/0	0/0	0/0
AMEC PHARMACY & GENERAL MERCHANDISE, SIGNATORY	0/0	0/0	0/2	0/2
ANGELEIS DRUGSTORE, SIGNATORY	0/0	0/0	0/2	0/2
ARGUELLES PHARMACY 1, SIGNATORY	0/0	0/0	1/2	1/2
ARGUELLES PHARMACY 2, SIGNATORY	0/0	0/0	0/0	0/0
ARGUELLES PHARMACY 3, SIGNATORY	0/0	0/0	0/0	0/0
BONIFACIO DRUG, SIGNATORY	0/0	0/0	1/2	1/2

Note:
Tap on each KPI result to view its details. Once tapped, you will be directed to Call Report Module

Doctors/Account Information Module

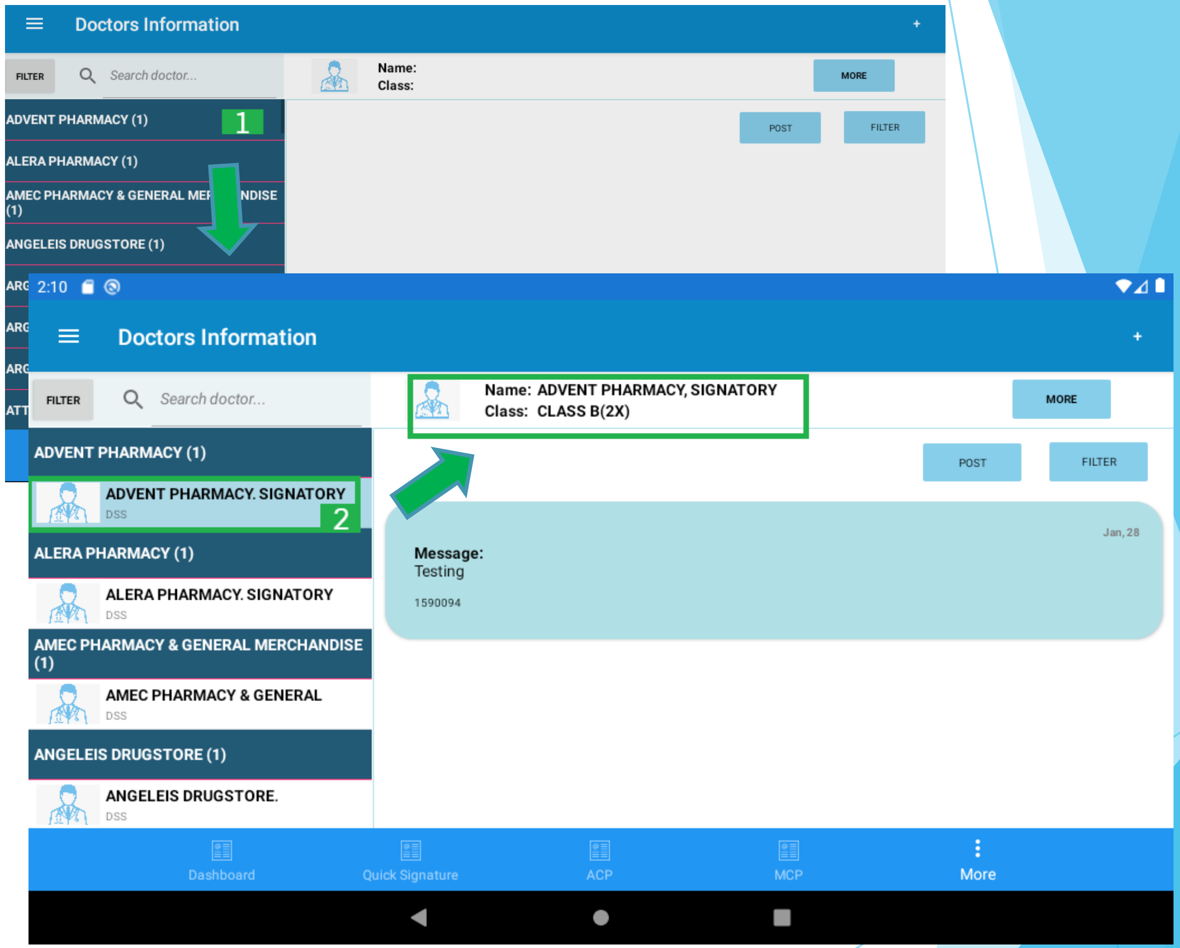
Displaying a Customer's Information

From the Doctor's Information module,

Follow these steps on how to display a customer's details.

1. Tap an Institution.
2. Choose a Customer.

The customer's details are displayed on the top part of the module.

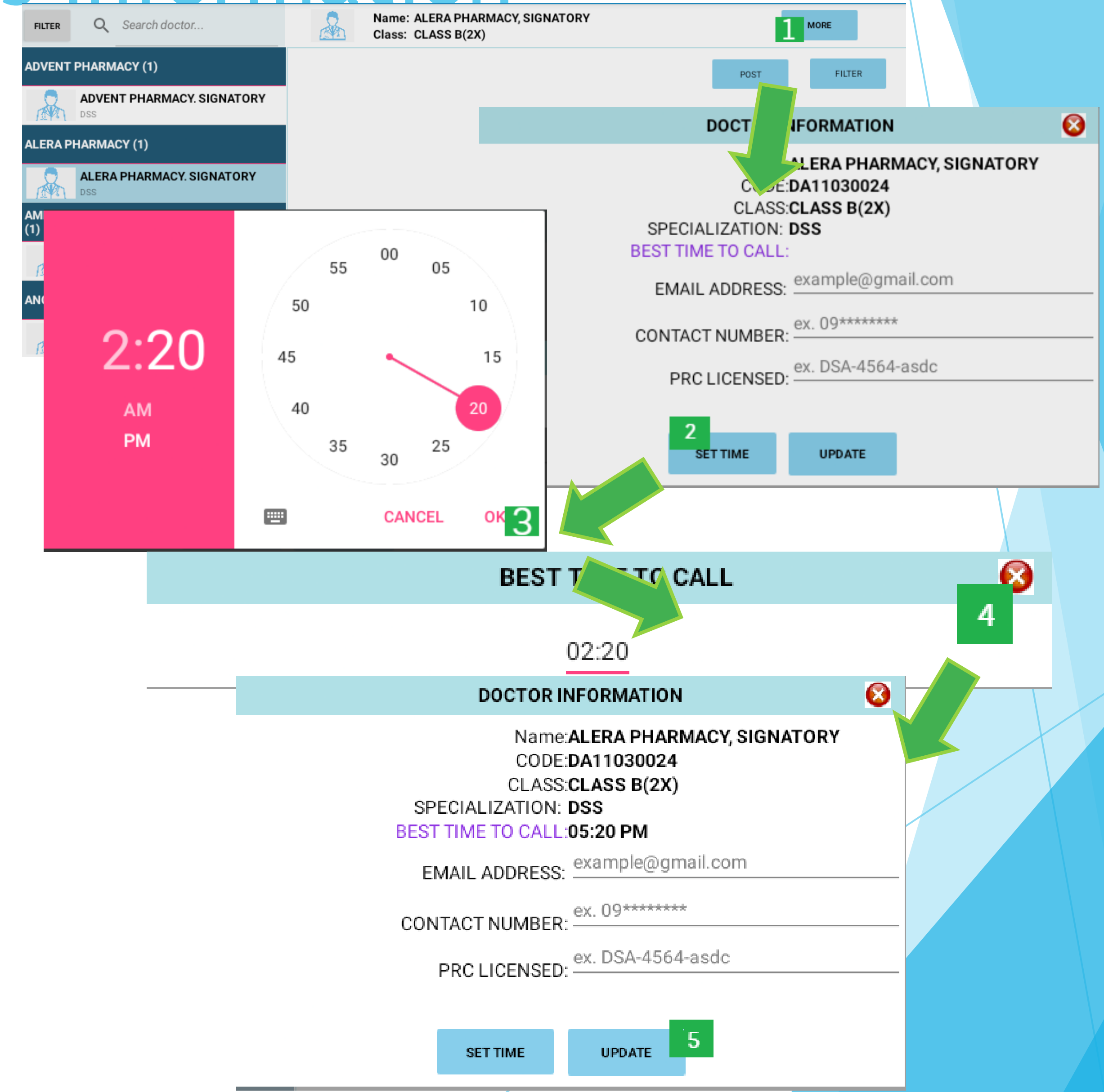


Note:
The term "customer" in this material refers the following:
Doctor for Medical Representatives
Pharmacy for Sales Representatives

Adding a Customer's Information

After choosing a customer, follow these steps to add the customer's Information.

1. Tap on the More Button.
2. Click Set Time.
3. Add the customer's Time.
4. Tap Close.
5. Click on the Update button.

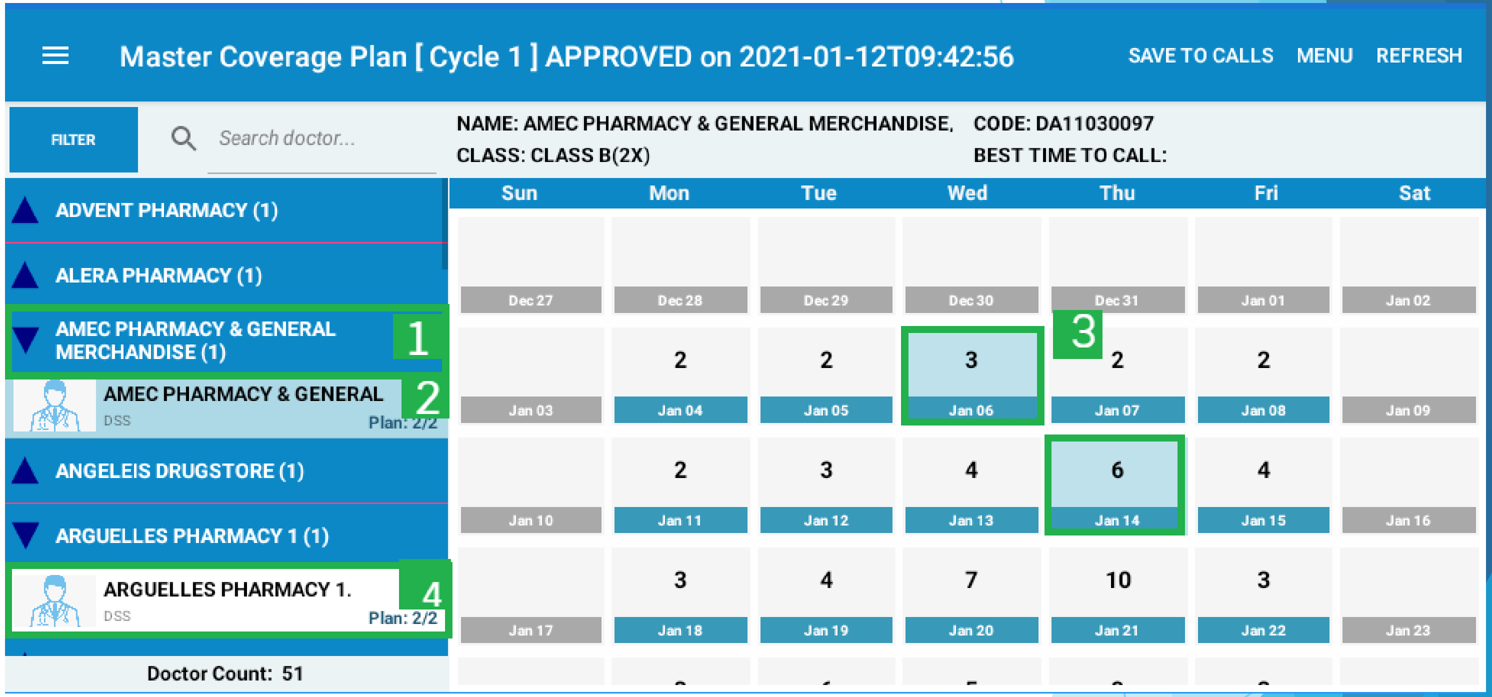


Master Coverage Plan(MCP) Module

Plotting Calls in MCP

To plot calls, make sure to check the Cycle you are planning to plot.

1. Choose an Institution.
2. Choose a Customer.
3. Tap on the date you plan to visit the customer.
4. Choose another customer.



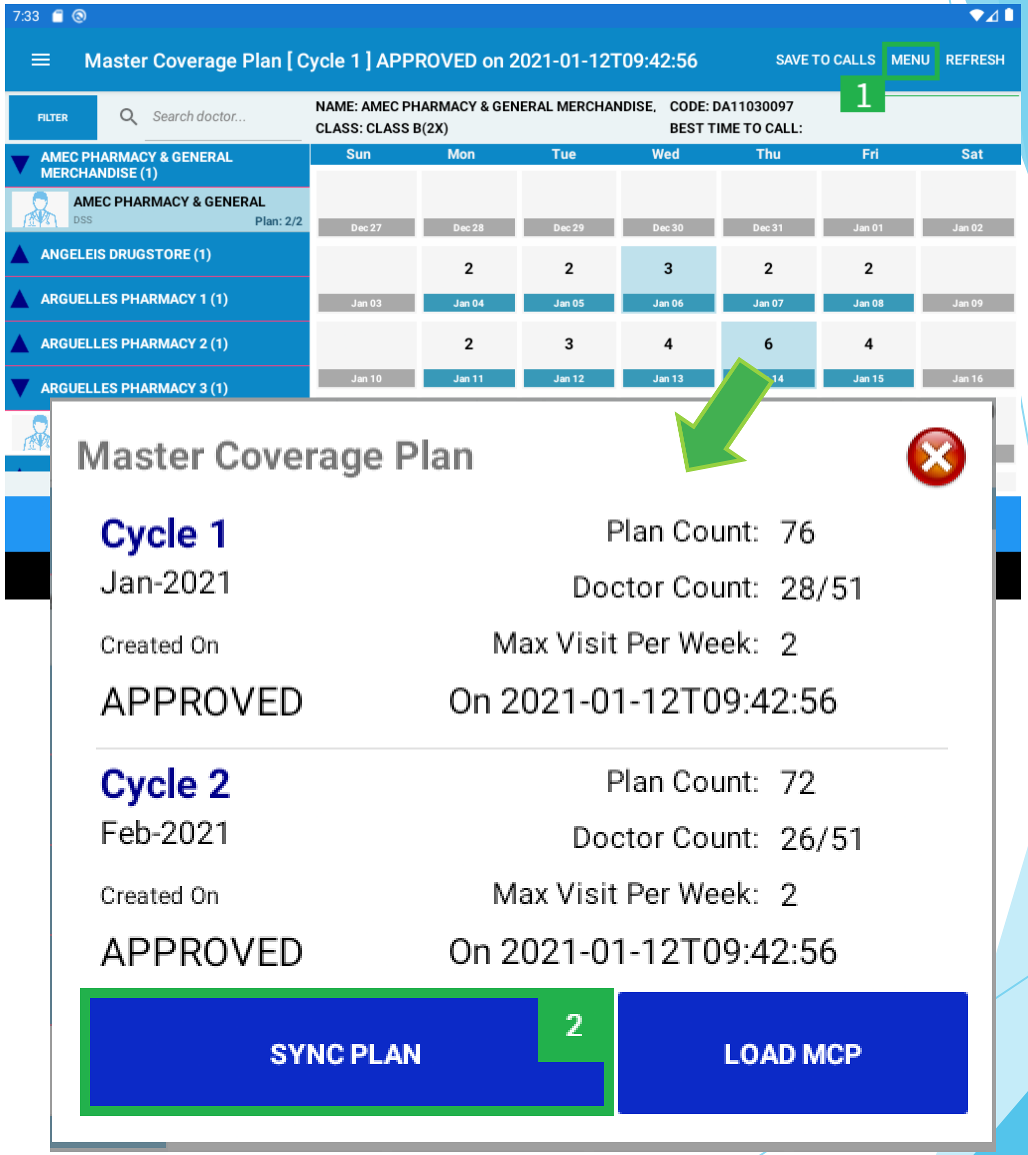
Note:
To Transfer a plotted call to a new date, re-tap the call then choose a new date.

Submitting the MCP

To submit your MCP for approval,

Follow these steps:

1. Tap on the Menu button.
2. Tap Synch Plans.



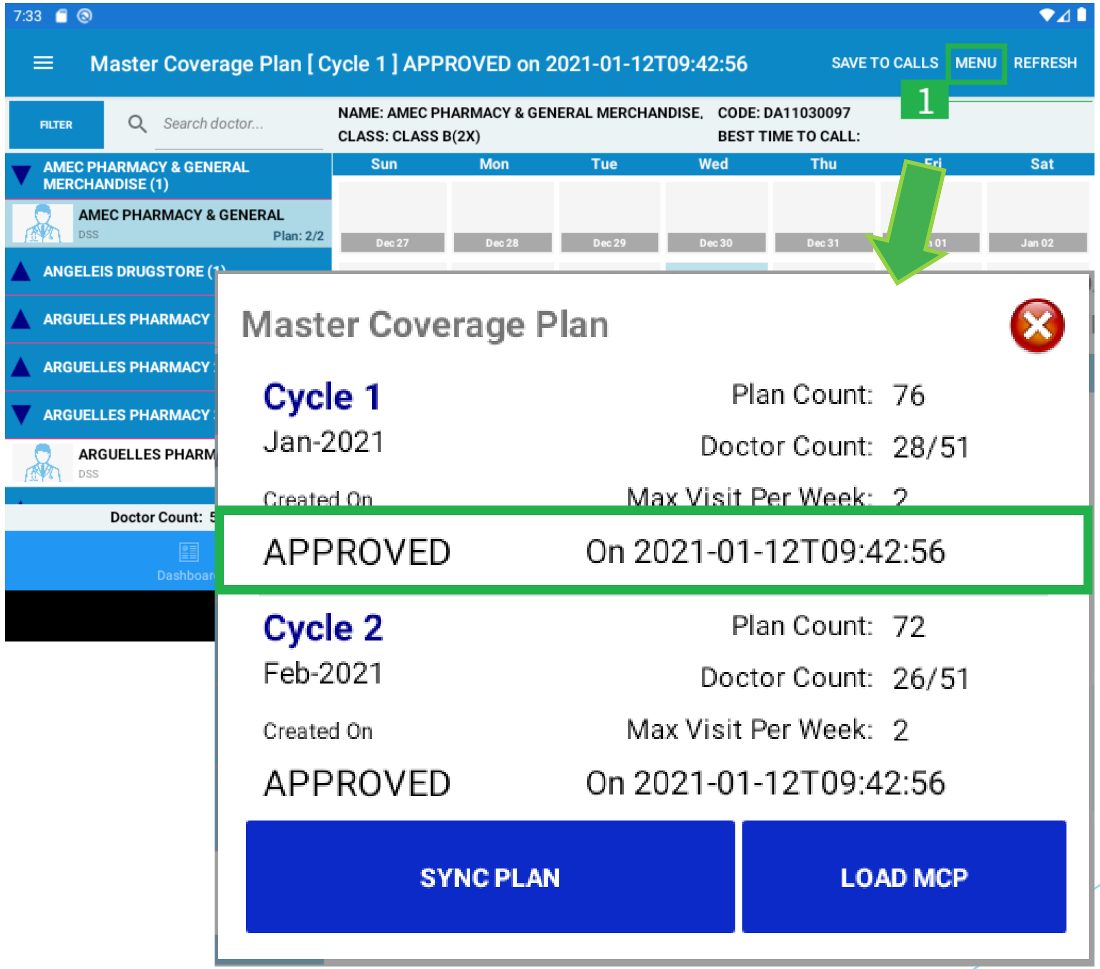
Note:
Editing a submitted MCP is not allowed unless:
1. The District Manager did not approved the MCP.
2. The District Manager approved the MCP and the cycle has not yet started.

Checking the Submitted MCP Status

1.Click the Menu bar

It displays the following Status

- Draft
- Submitted
- Disapproved
- Approved



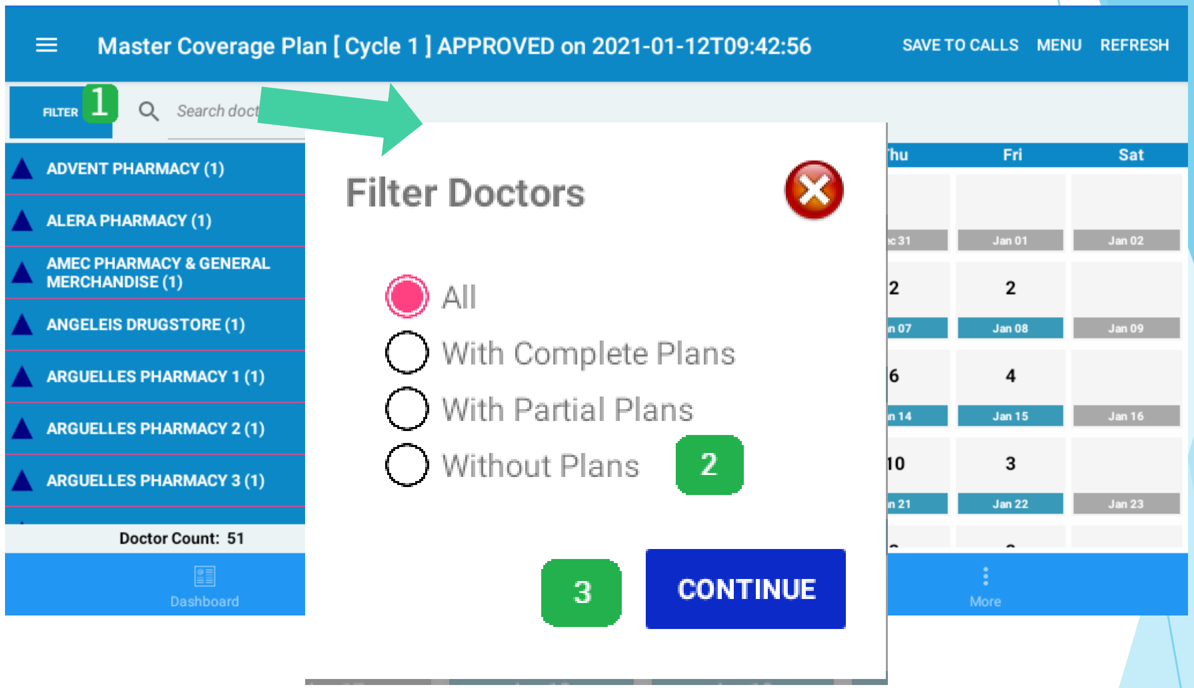
Checking for Unplotted Calls

From the MCP module,follow these steps to check for unplotted calls.

1.Tap on Filter.

2.Choose Without Plans.

3.Tap Continue.



Saving approved plan to calls

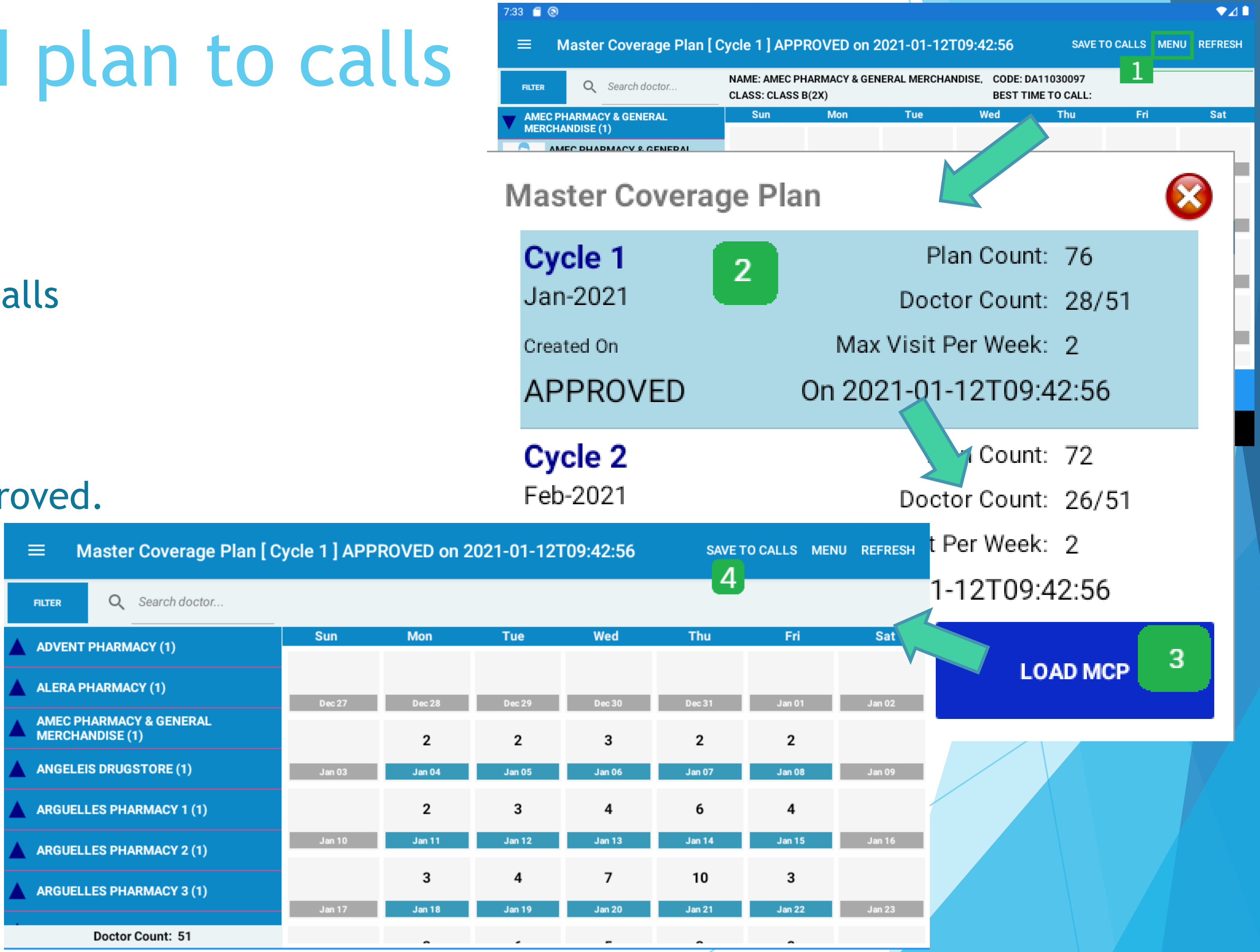
In order to place your plans in calls

Follow these instructions:

1. Tap on Menu

Check your specific plan is approved.

2. Tap on a specific Cycle.
3. Tap on Load MCP.
4. Tap Save to Calls



Actual Coverage Plan(ACP) Module

Conducting a Call

These are the steps on how a Field Representative can capture a call.

1. Choose an Institution.
2. Tap a Customer.
3. Add Products.

Note:
Adding a product is optional and will depend on the scheduled call. Follow the steps on how to add products.

Conducting a Call

4. Go to the Notes tab then click

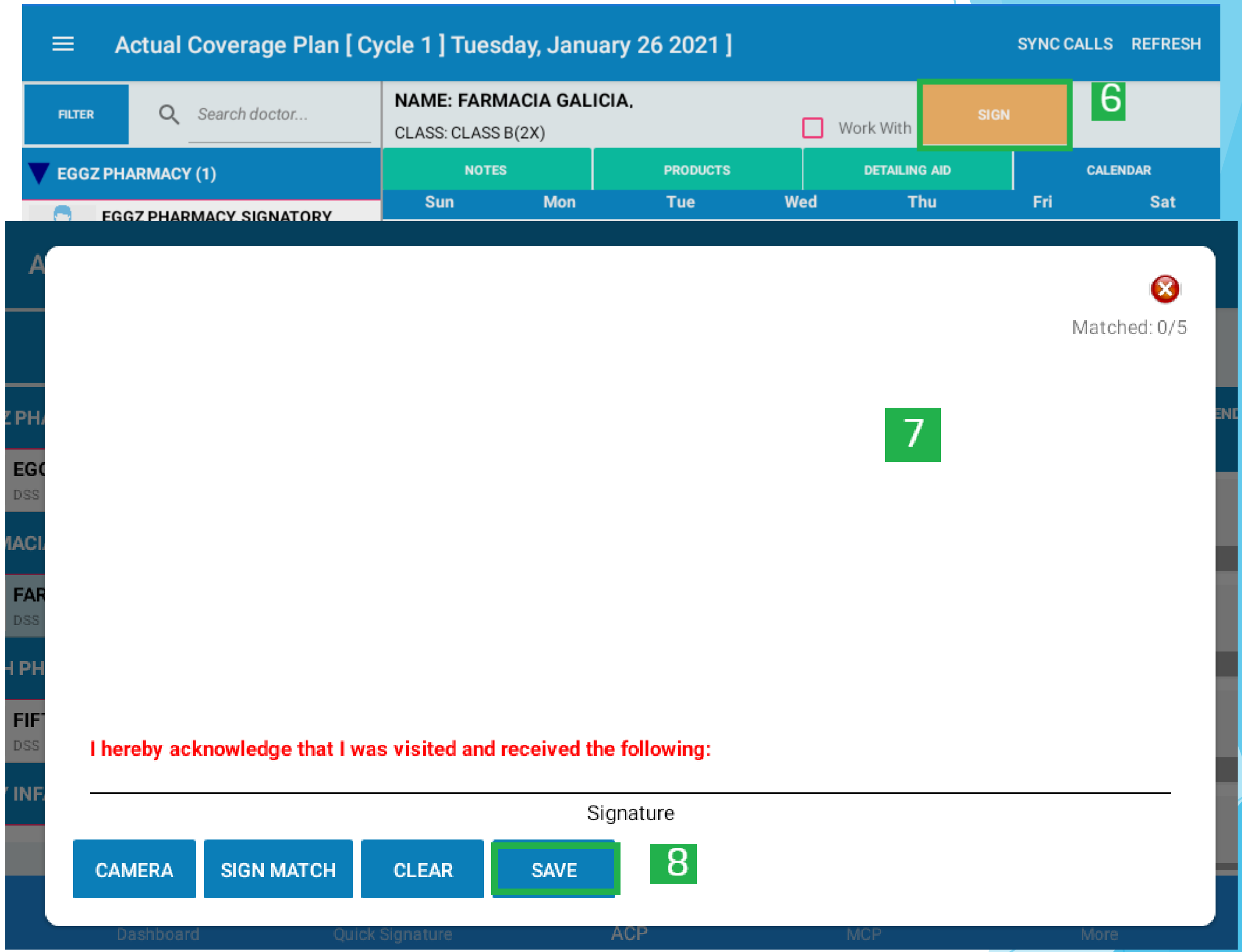
+Notes.

5. Tap the Call Now button to begin the call.

Note:
If it’s a joint call, check the work with box before tapping the Call Now button.

Conducting a Call

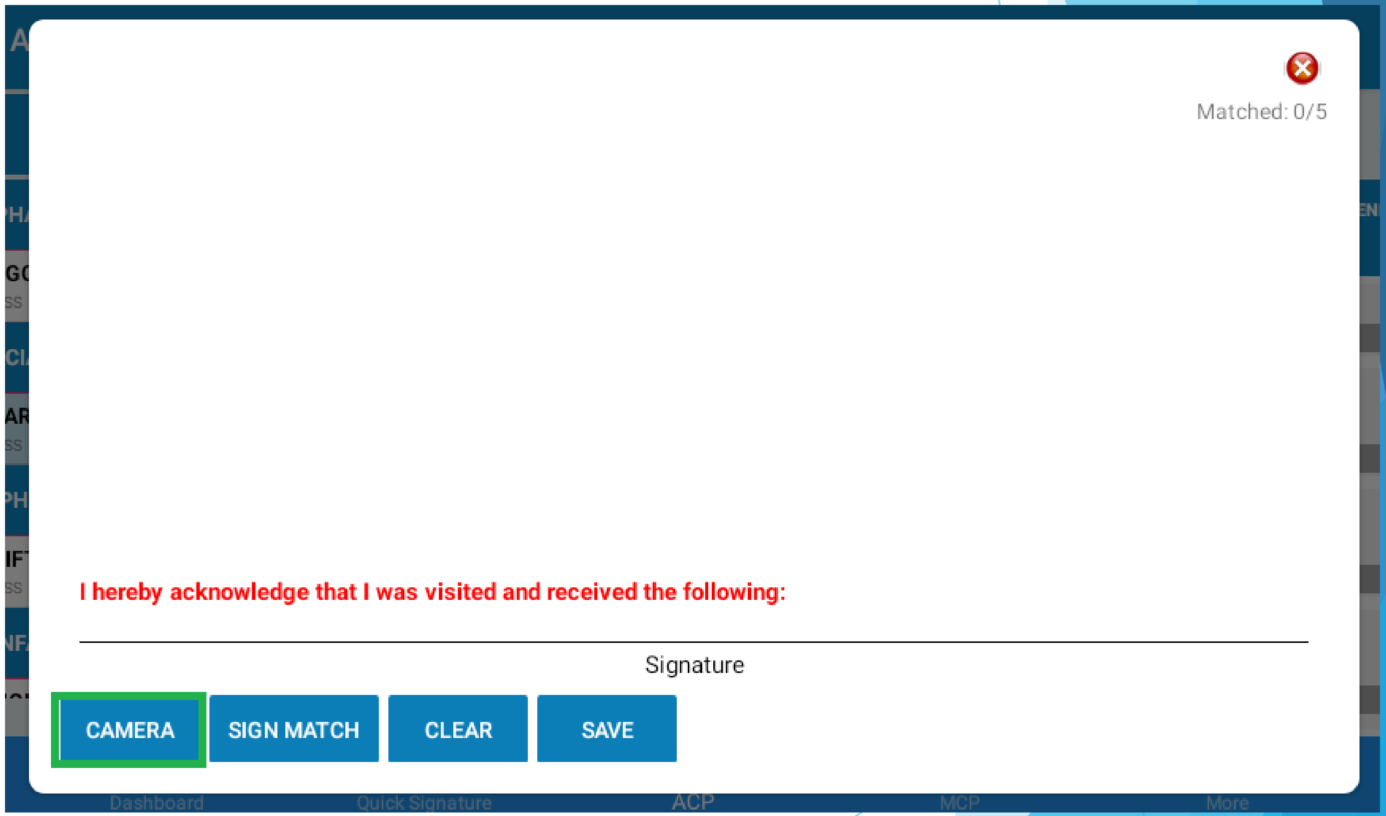
6. Tap the Sign button.
7. Ask the customer to sign in the white space.
8. Tap on Save.



Conducting a Call

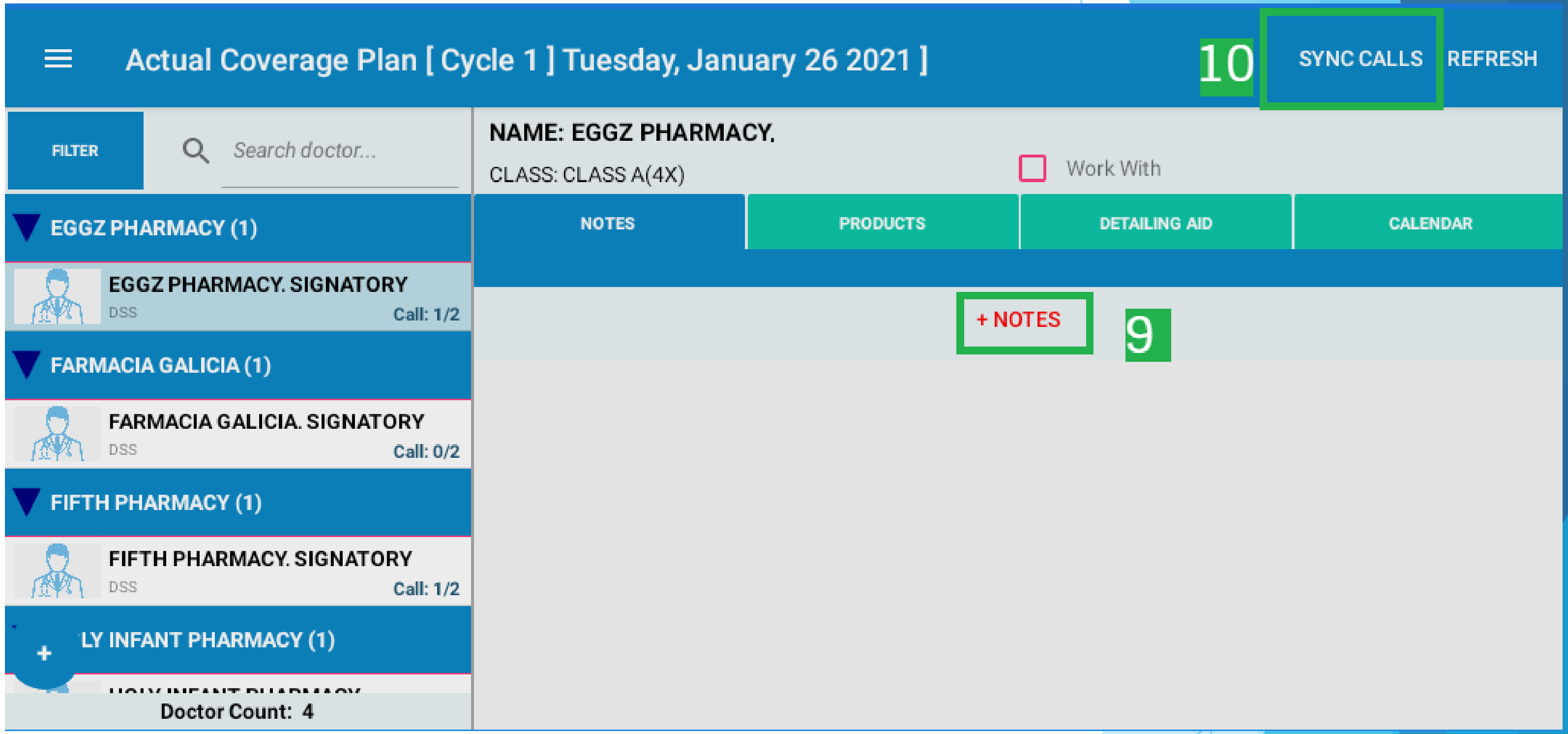
- Alternative to signing signatures:

  - Tap the camera button.
  - Take a picture alongside with your customer.



Conducting a Call

9. Tap on +Notes to add a post call note.
10. Tap Sync Calls.



Adding the Count per Product

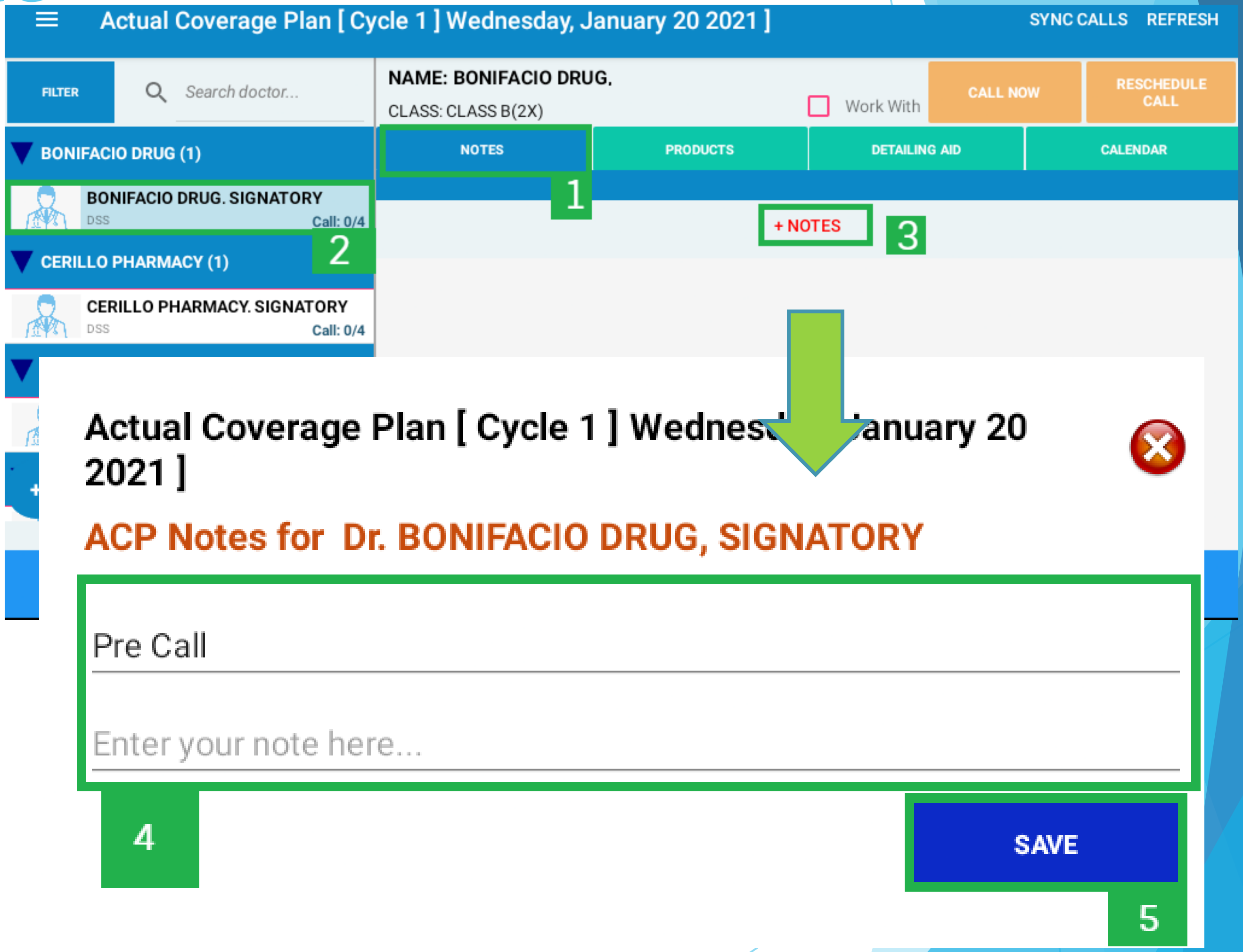
Follow these steps on how to set the count per products to be used during call.

1. Tap on +Products.
2. Tap on product.
3. Tap Add.
4. Choose a product.
5. Set the products' count one by one
6. Tap Done

Adding a Pre-call Note

These are the steps on how to add a pre-call note.

1. Go to the Notes Tab.
2. Choose a customer.
3. Tap on +Notes.
4. Type in the pre-call note.
5. Tap Done.



Note:

- Pre-call notes are optional and will depend on the customer's requested application setting.
- Pre-call will appear in +Notes if you haven't Tap the Call now button.

Presenting a Detailing Aid

After tapping the call now button, follow these steps on how to present a detailing aid.

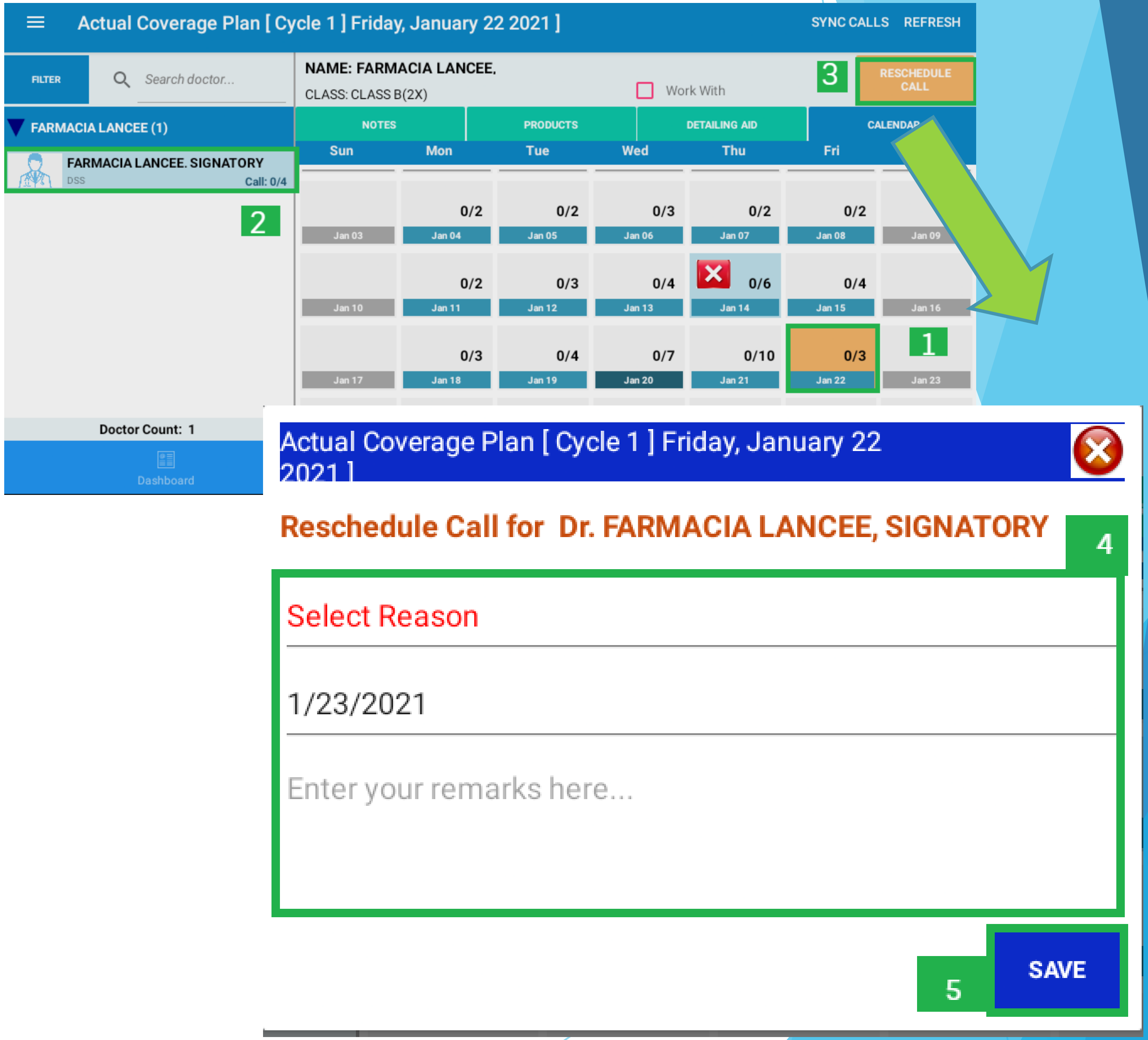
1. Tap on Detailing aid.
2. Select a detailing aid.

Rescheduling a Call

Follow these steps on how to reschedule a call.

1. Tap on the plotted days.
2. Tap on a customer.
3. Tap Reschedule call.
4. Fill in the reason for the reschedule day and set what day you want to choose.
5. Tap Save.

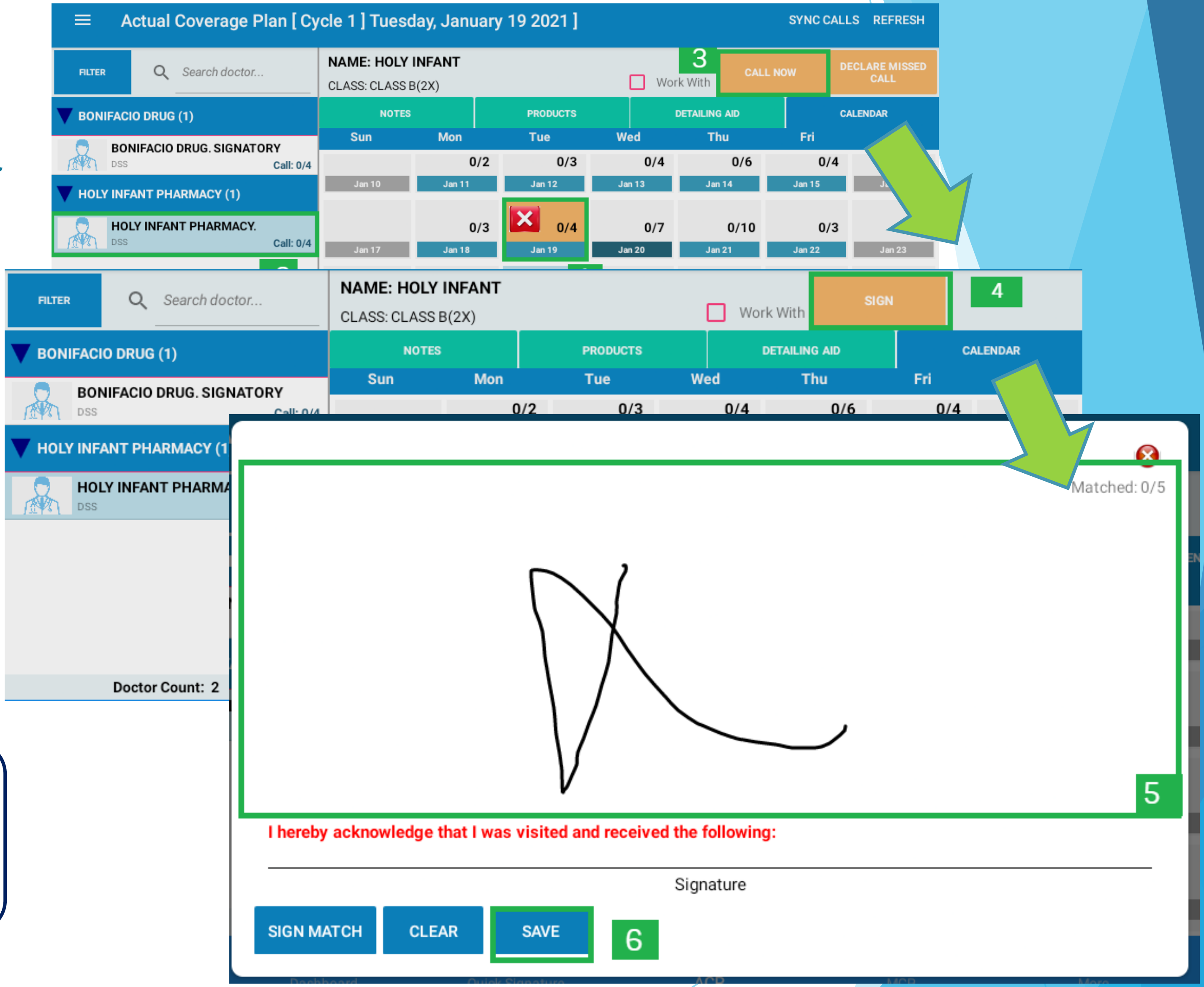
Note:
Reschedule call button will only appear on the advance days base on the current day.



Recover a call

Follow these steps on how to recover a call.

1. Tap on the plot.
2. Select a customer.
3. Tap Call now.
4. Tap Sign.
5. Fill in the signature.
6. Tap save.



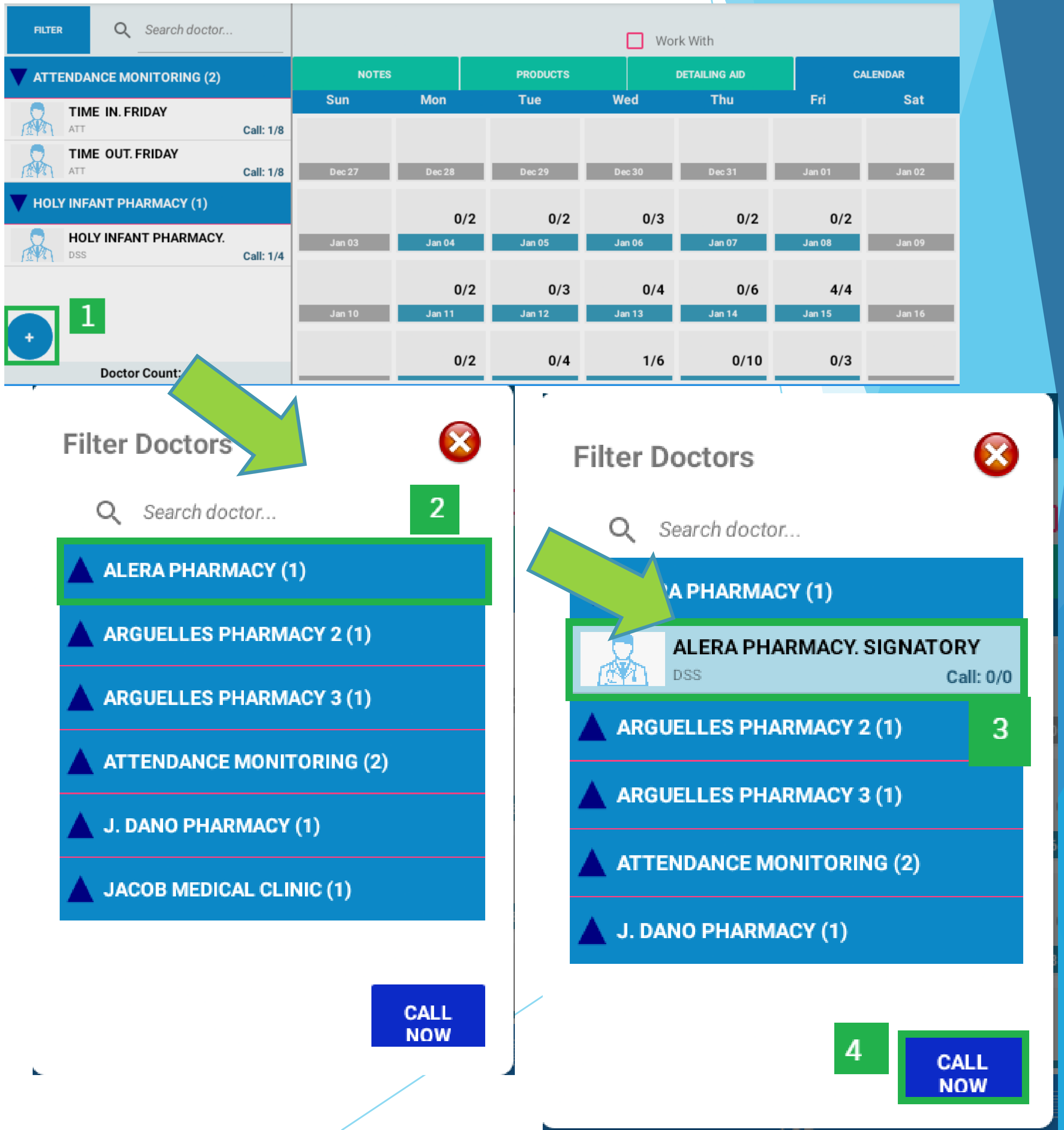
Note:
Call now button will only appear on the days you missed.

Incidental Call

These are the following steps on how to conduct an incidental call.

1. Tap + button
2. Choose an institution.
3. Select a customer name.
4. Tap Call now.

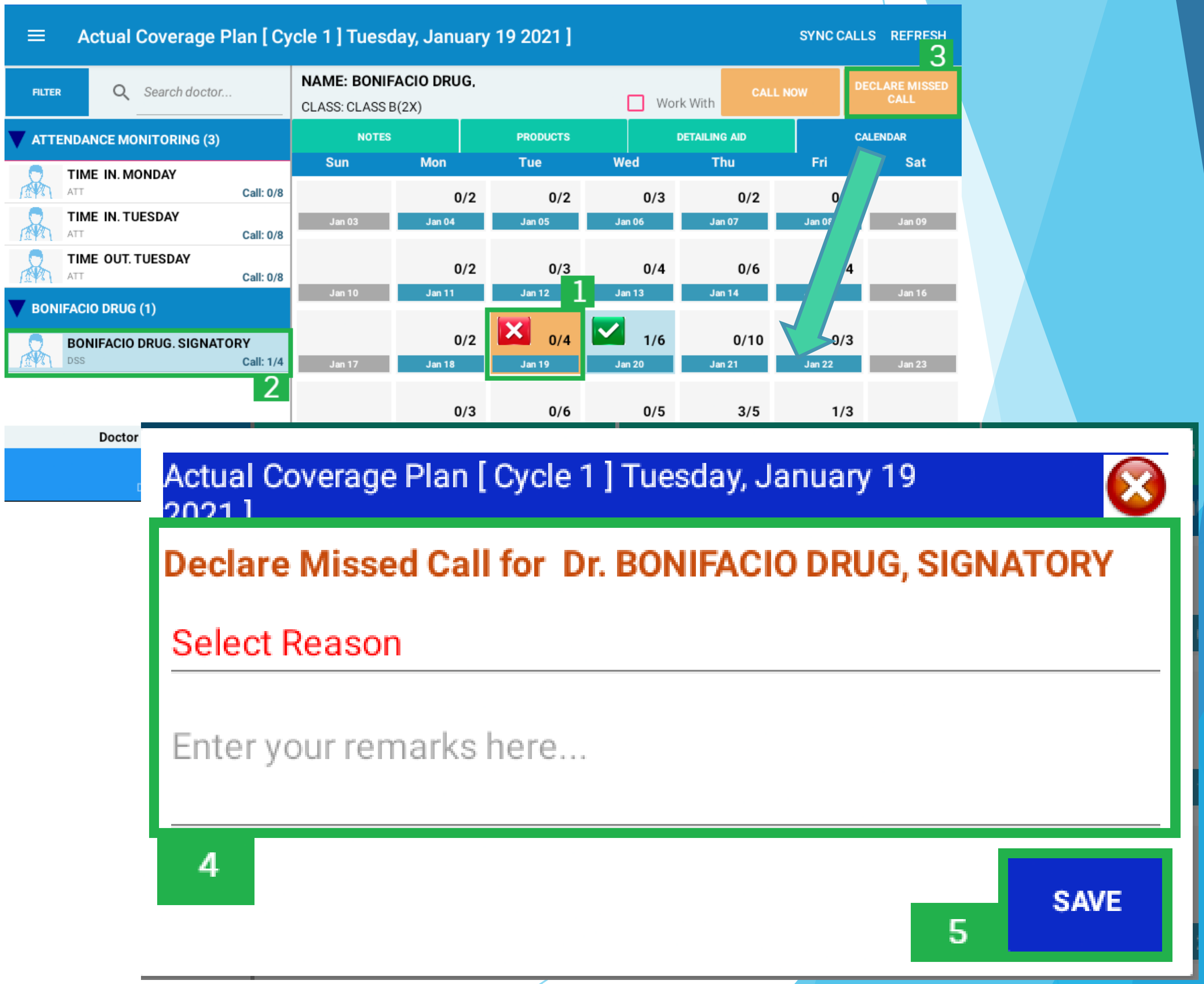
Note:
Incidental Call will automatically add on the current day.



Declaring a Missed Call

Follow these steps when declaring a missed call.

1. Tap on a plot
2. Choose and tap on customer.
3. Tap declare missed call.
4. Fill in the reason for missed.
5. Tap Save.



Note:

- Declaring missed calls will appear on the days you've missed.
- Declaring a missed call is still subject for the District Manager's approval.

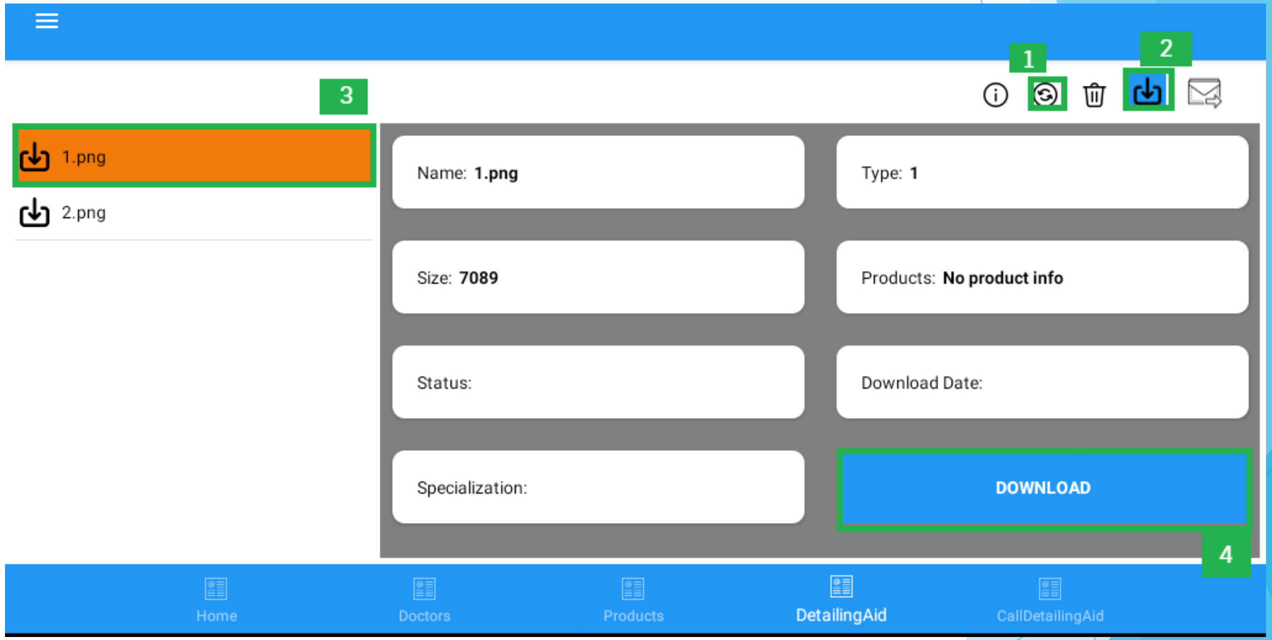
Detailing Aid Module

Downloading a Detailing Aid

To download detailing aid,

Follow these steps:

1. Synchronize the Detailing Aid Module.
2. Tap on the Download Button.
3. Select a detailing aid.
4. Click Download.



Note:
Synchronize the module first before downloading to get the latest and updated detailing aids.

Detailing Aid Information

To check the information of a detailing aid:

1. Tap of the information button.
2. Select a detailing aid.

The following will be seen:

- Name of the file
- File type
- Size
- Products
- Status(if downloaded)
- Download Date

Deleting a Detailing Aid

To delete an old detailing aid,

Follow these steps:

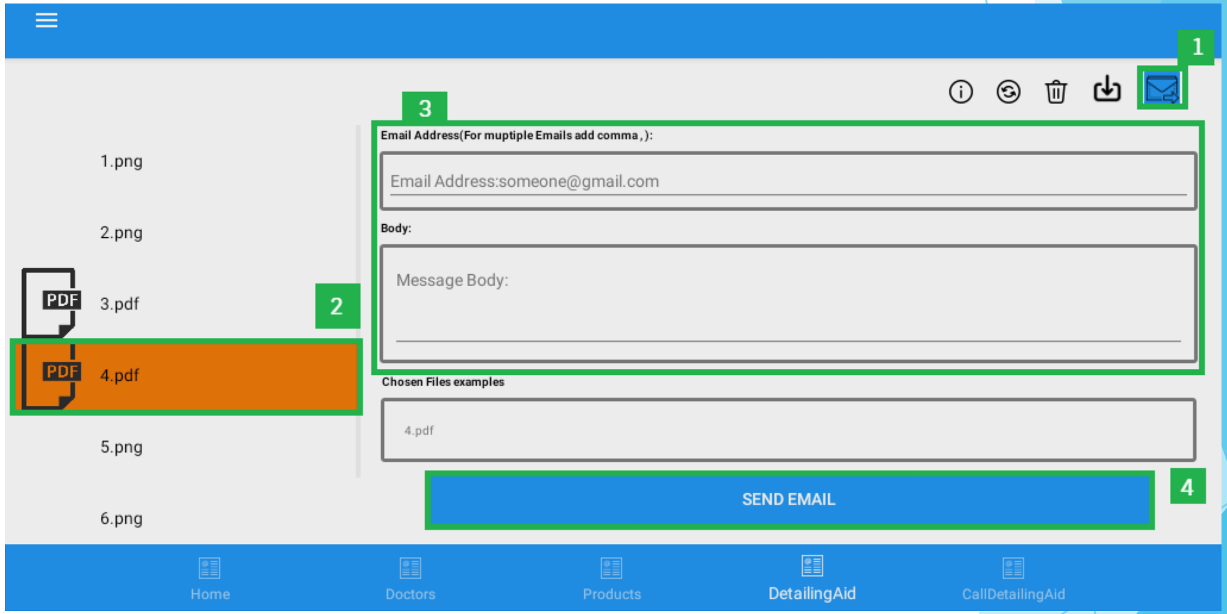
1. Tap on the trash bin button
2. Select a detailing aid
3. Tap Delete

Note:
The detailing aid will only be deleted in the device but not in the cloud server

Sending a Detailing aid via E-mail Message

Follow these steps on how to send a detailing aid via e-mail.

1. Tap on the E-mail button
2. Select a detailing aid.
3. Type in the E-mail address.
4. Click Send email.



Notes:
Send e-mail to multiple recipients is allowed. Separate each e-mail address by a comma.

Quicksign Module

Quicksign

From the Quicksign module

Follow these steps on how to collect signatures in case the customer is in a hurry.

1.Ask the client to sign in the white space.

2. Tap on **Save**

Note:
After saving the signatures , follow the steps on how to conduct a call. Next match the saved signatures to the call.

Matching the Collected Signature to a Call

Proceed to conduct a call and match the collection signature.

1. Tap on **Sign Match**.
2. Swipe to left and look for the signature.
3. Tap **Match**.
4. Tap on the **Save button**.

Note:
The collected signatures will only be saved for 24 hours.