



SIMPLE SFA

User Guide for DM/RBDM

Version 2.0

Application Versions

Version	Date	Remarks
Version 1.0	2021-03	Initial released
Version 1.1	2021-06	Add Filter to Plan Approval (Submitted Draft Approved Declined)
Version 1.2	2021-08	New Module : #Approve Addition/Deletion of Doctors (MDU)
Version 2.0	2022-03	New Modules: #Itinerary Plan #Actual Plan Joint Calls Service Calls #Updated Doctor Addition/Deletion(MDU) #Missed Call Approval

Contents

#Getting Started #App Requirements #Installation #Updating the App #Setting Your Login Credentials #Synchronization	4 6
#Itinerary Plan #Overview #Joint Calls #Service Calls	7 8 9
#Actual Plan #Incidental Calls #Joint Calls #Starting a Call #Doctor and Call Notes #Performance Rating #Product and Material #Validation #Service Calls	10 11 12 13 14 15
#Approval #Plan Approval #Doctor Addition/Deletion Approval (MDU) #Missed Call Approval	16 18 19

#Getting Started

#App Requirements

#Android

The minimum version for android device is 5.0 (Lollipop) with at least minimum display resolution of 800 x 1280 pixels. Device RAM must be at least 2GB and 8GB storage.

#IOS

The current version release targets android devices. We will notify if IOS version is available.

#Installation

We will assist you with your initial installation. Set schedule with us and be sure to prepare the following:

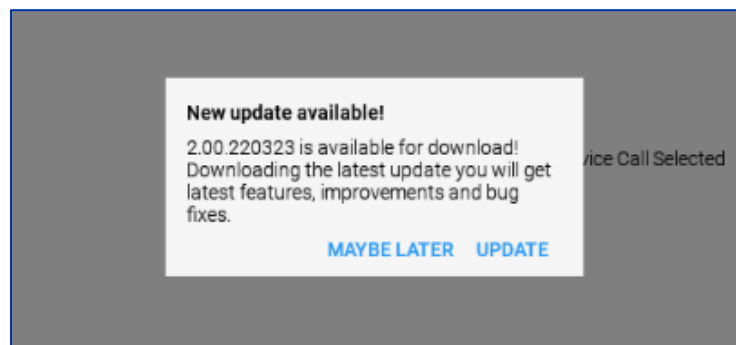
#Tablet/Device

#Reliable Internet Connection

#Anydesk (Download from Play Store)

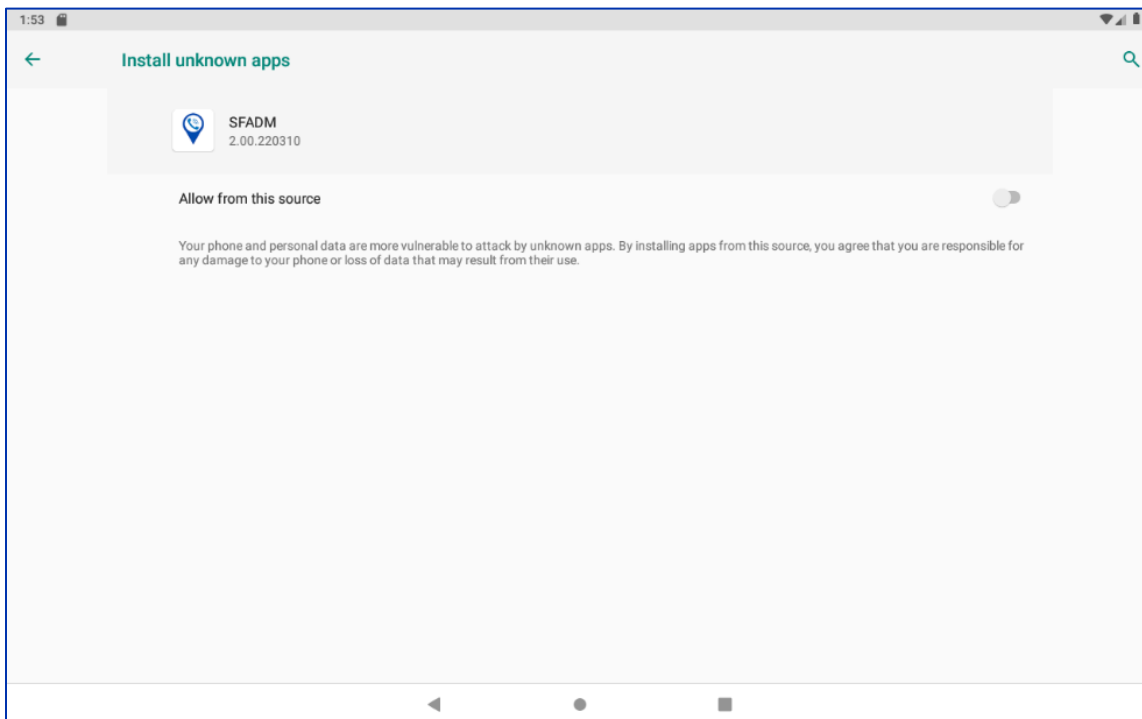
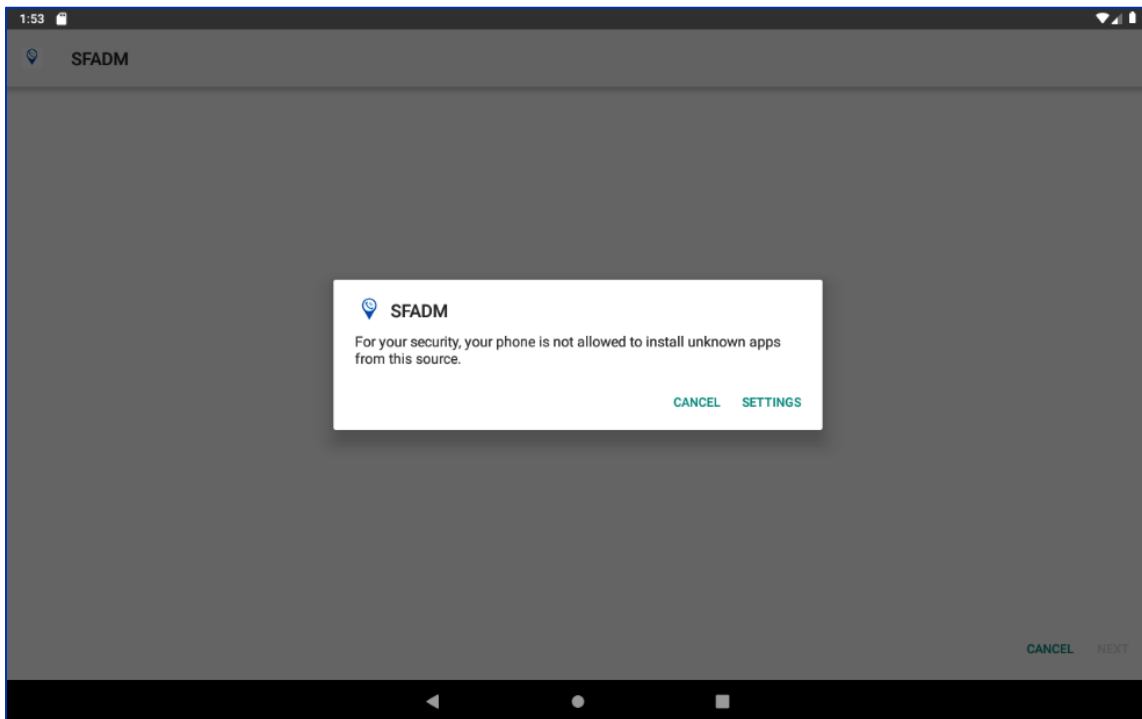
#Updating the App

Once Logged In, the App will automatically notify you when new version is available.



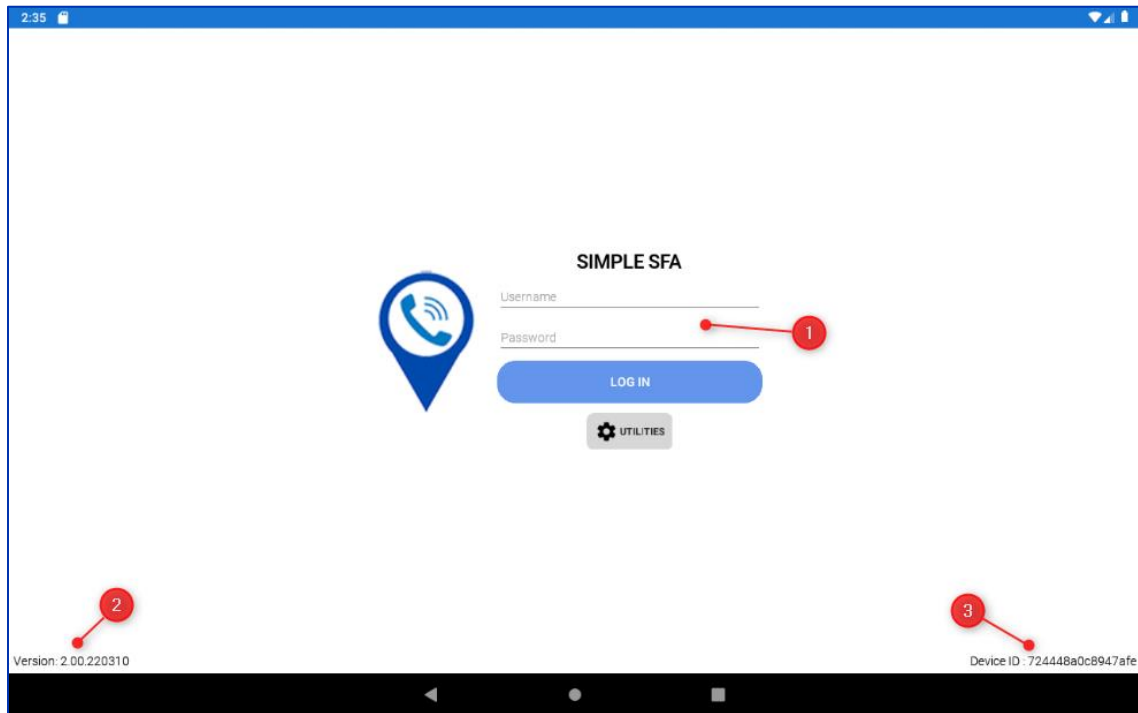
Note: We recommend to [sync your data](#) before updating the App. Please do App update when you have [strong/reliable internet connection](#) for the new version needs to be downloaded (less than 100mb) and all your data will be uploaded before new update is installed.

When downloading the new version is complete, installation UI will appear. For some devices, you will be prompted to allow installation from unknown source. Tap [setting](#) then check/toggle [Allow from this source](#) then tap back and install.



#Setting Your Login Credentials

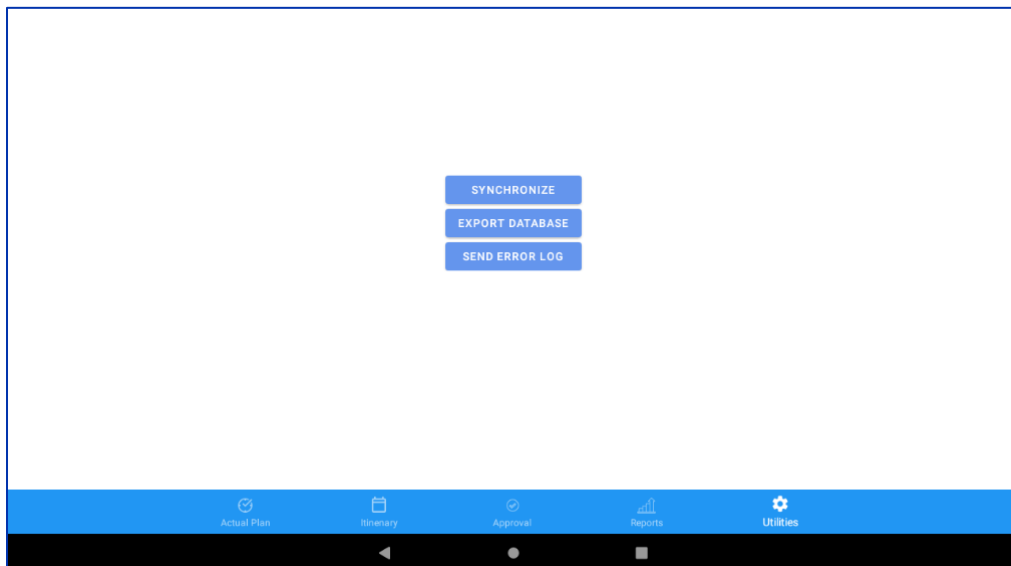
1. Username and Password – Provided by [SSTS Co](#)
2. App Version – Displays the current installed version
3. Device ID – Unique Identification of devices



Note: First login requires [strong/reliable internet connection](#) as the App will download your data from the server.

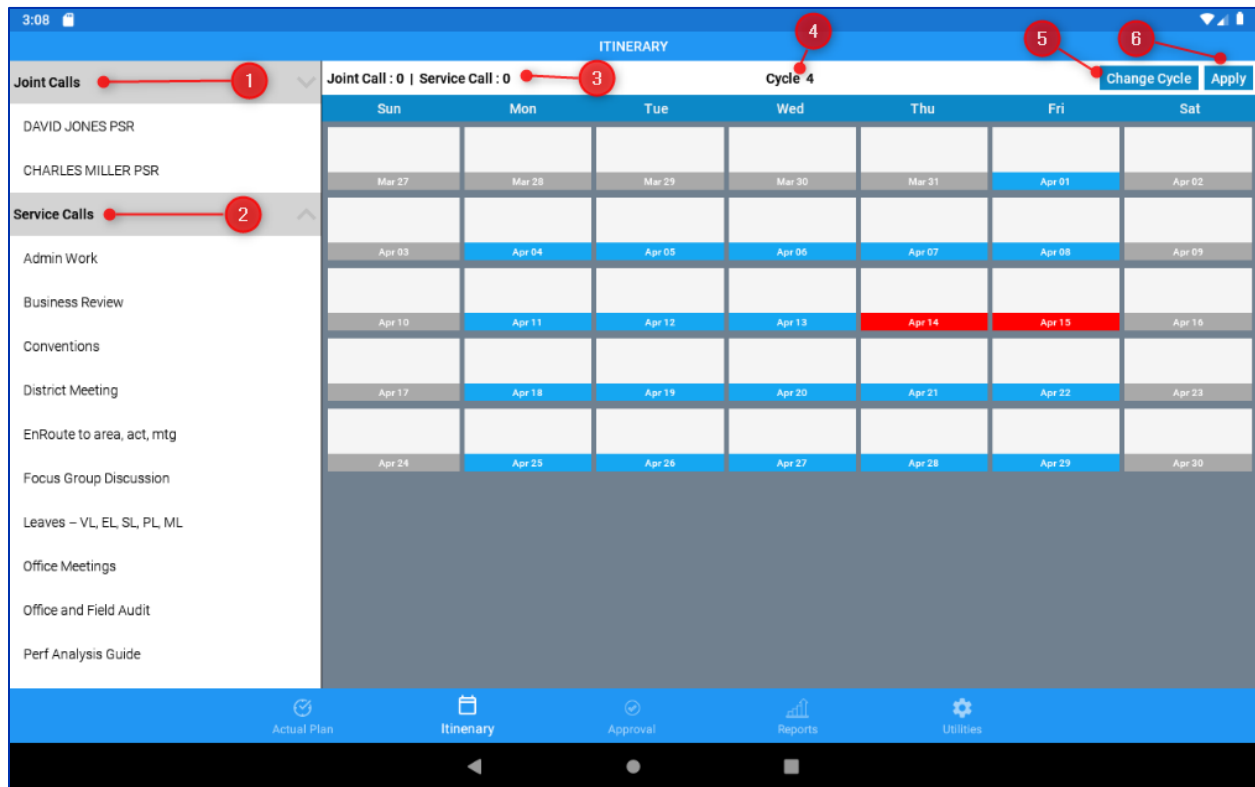
#Synchronization

Your data needs to be uploaded to the server. We recommend to sync every day. To sync, go to Utilities then Synchronize.

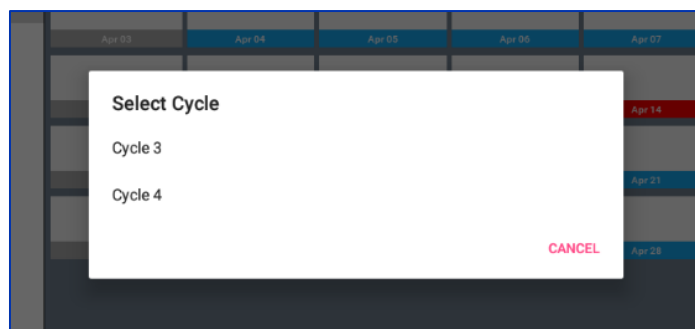


#Itinerary Plan

#Overview

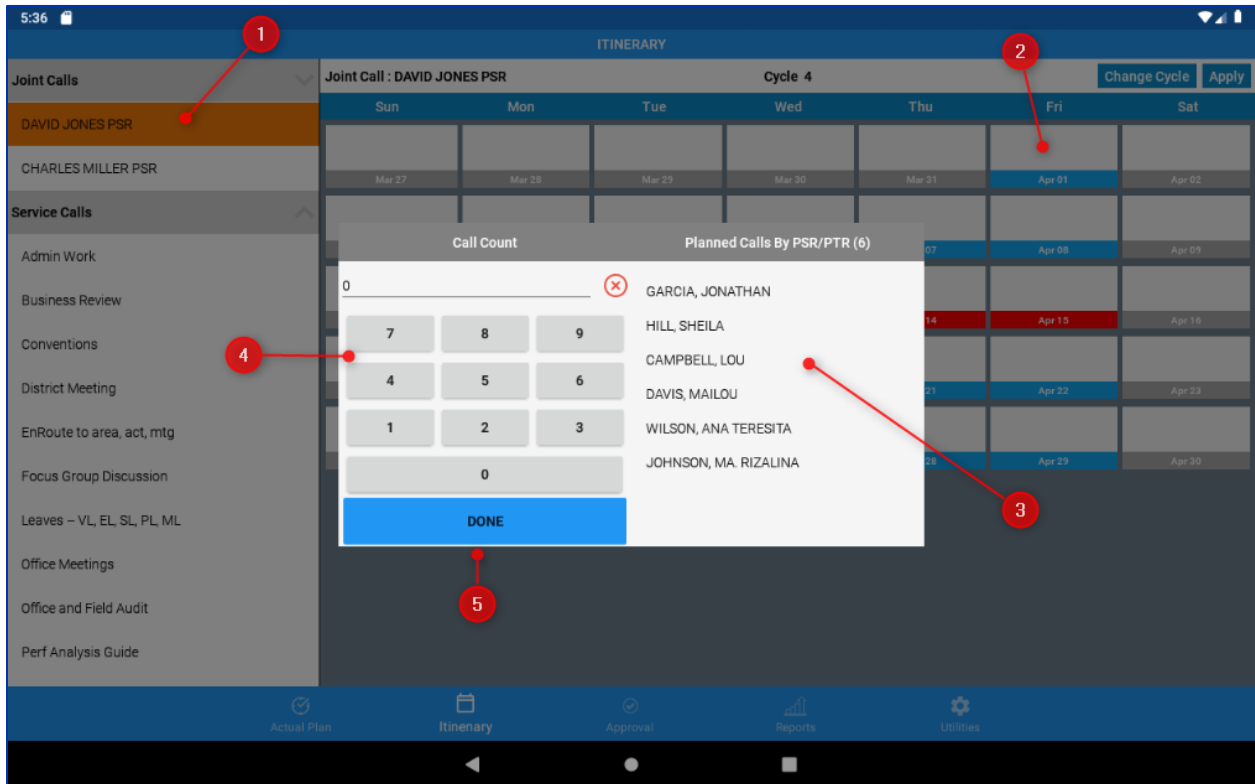


1. **Joint Calls** - Lists of PSR/PTR under your branch. For RBDM, all PSR/PTR under your assigned branches
2. **Service Calls** - Lists of all active services
3. **Calls Count** - Displays Joint and Service Call Count
4. **Cycle Number** - Current selected cycle for plotting
5. **Change Cycle** - Tap to switch between current and next cycles



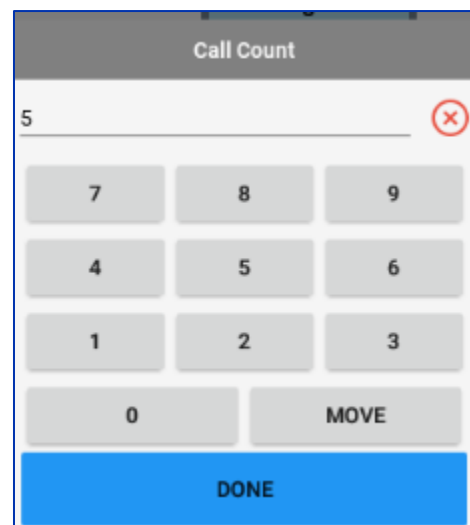
6. **Apply/Save Button** - Tap to apply and save changes to your plan

#Joint Calls - Plotting

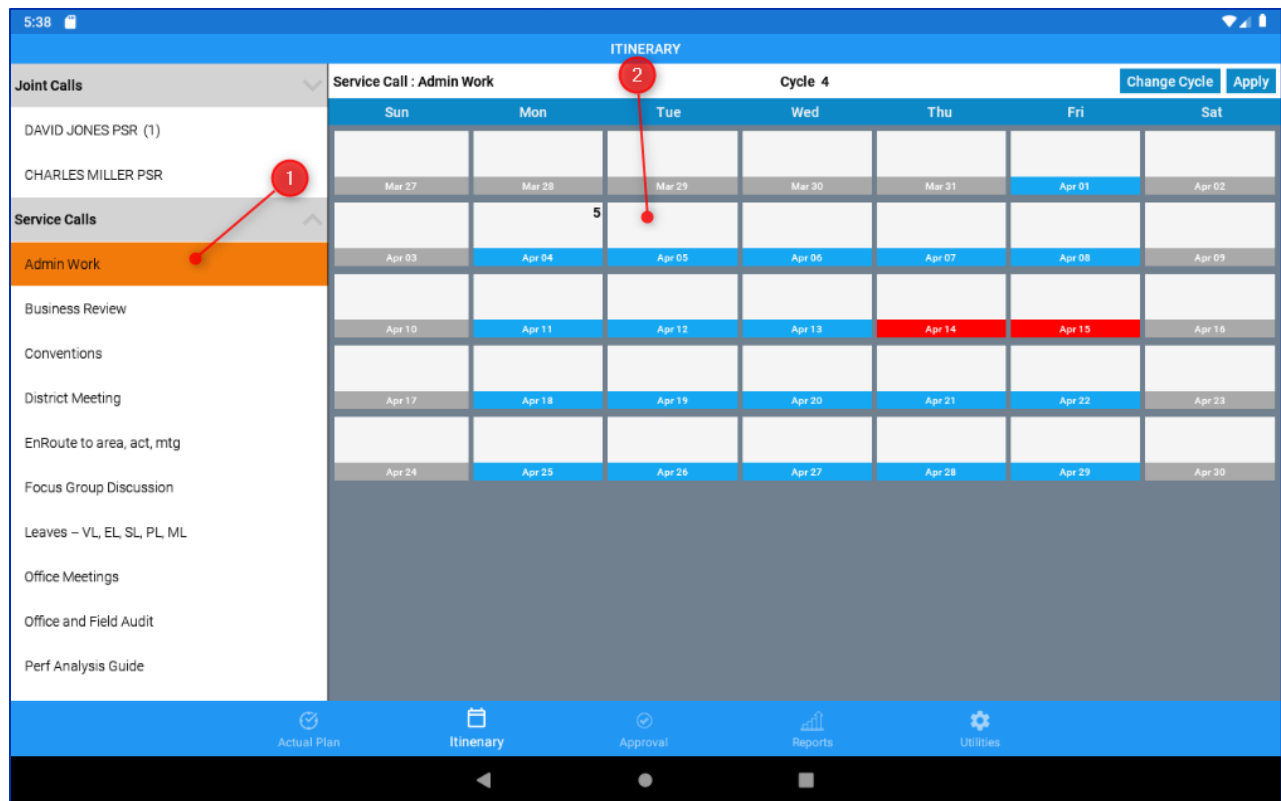


Note: Before planning joint call, it is highly recommended to approve your PSR's submitted plans for you to [view planned doctors](#) on selected day as your reference (labeled #3).

1. Select [PSR](#) to work with
2. Tap the day you want to plot then plan count dialog will show
3. Browse List of Doctors/Drugstores planned by PSR ([View Only](#))
4. Set number of joint calls
5. Tap 'Done'. Repeat from step 2 for other days
6. To [Move Plan](#), Tap the planned day then tap move then select different day



#Service Calls - Plotting



1. Select Services
2. Tap the day you want to plot
3. To remove plot, tap selected day again

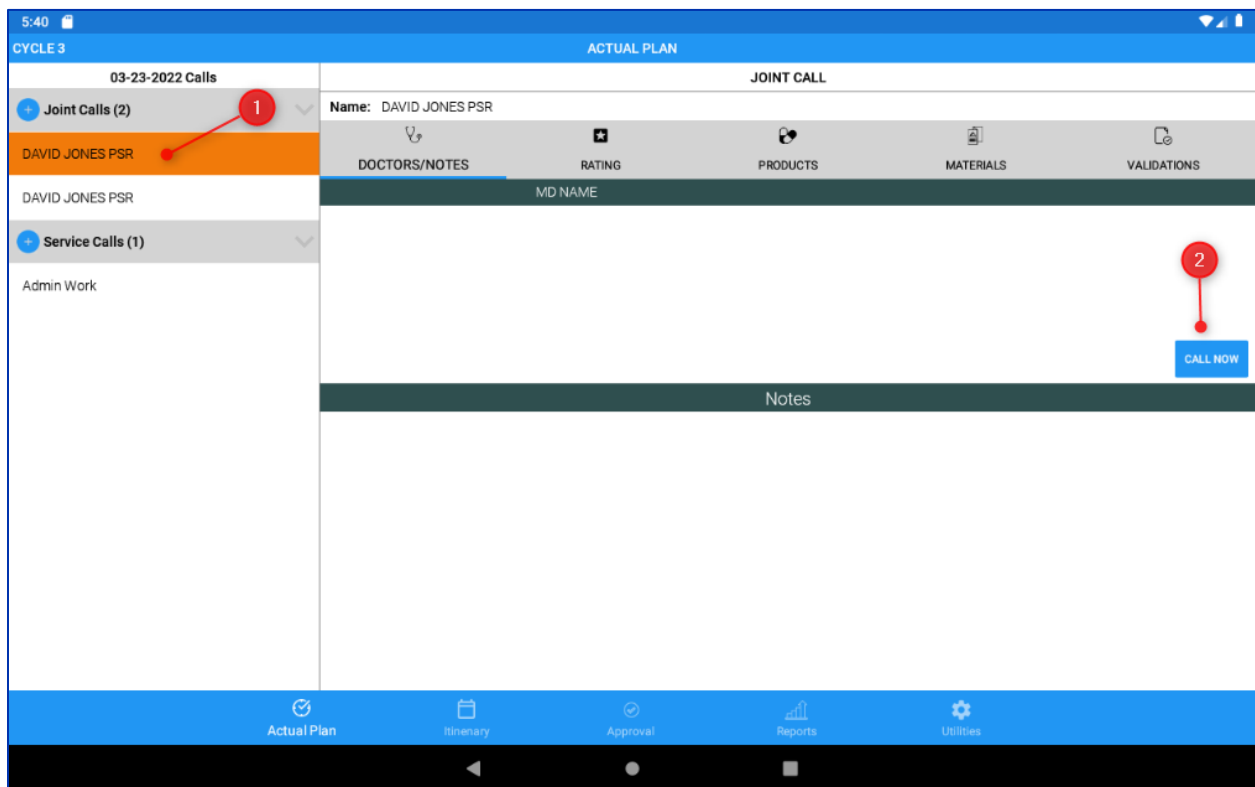
#Actual Plan

After Login, you will be redirected to Actual Plan. You can view your planned joint and service calls in the left side.

#Incidental Calls

In scenarios where you are working with PSR or doing service call without plotting a plan, you can add [Incidental Call](#) by tapping + icon beside Joint Call/Service Call then start call.

#Joint Calls



#Start a Call

1. Select PSR/PTR
2. Tap Call Now to officially start a call.

Note: Start time of call will be recorded after tapping [Call Now](#).

#Doctor and Call Notes

5:43

CYCLE 3

03-23-2022 Calls

Joint Calls (2)

DAVID JONES PSR

DAVID JONES PSR

Service Calls (1)

Admin Work

ACTUAL PLAN

JOINT CALL

Name: DAVID JONES PSR

DOCTORS/NOTES

RATING

PRODUCTS

MATERIALS

VALIDATIONS

MD NAME

DELANTAR, BLYTH

Notes

Present new detailing aids

Actual Plan

Inventory

Approval

Reports

Utilities

1. Tap + doctor to search for doctor
2. Search doctor name (Planned doctors will appear first on the list)
3. Select doctor then Tap Select
4. To Remove doctor, tap remove icon before doctor name

5:41

CYCLE 3

03-23-2022 Calls

Joint Calls (2)

DAVID JONES PSR

DAVID JONES PSR

Service Calls (1)

Admin Work

Doctors

Search Here

(Planned) DELANTAR, BLYTH

(Planned) Molon, Cebe Paul

(Planned) Catudio, Armand

(Planned) JAMER, KATHERAINE CAPITO

(Planned) GENERIC, MD 2

(Planned) GENERIC, MD 6

(Planned) GENERIC, MD 17

(Planned) GENERIC, MD 18

(Planned) Sabulao, Neil

(Planned) CIDRO, GONDELYN

AGUILAR, DANILO

ALEGATA, LEDA CLAROS

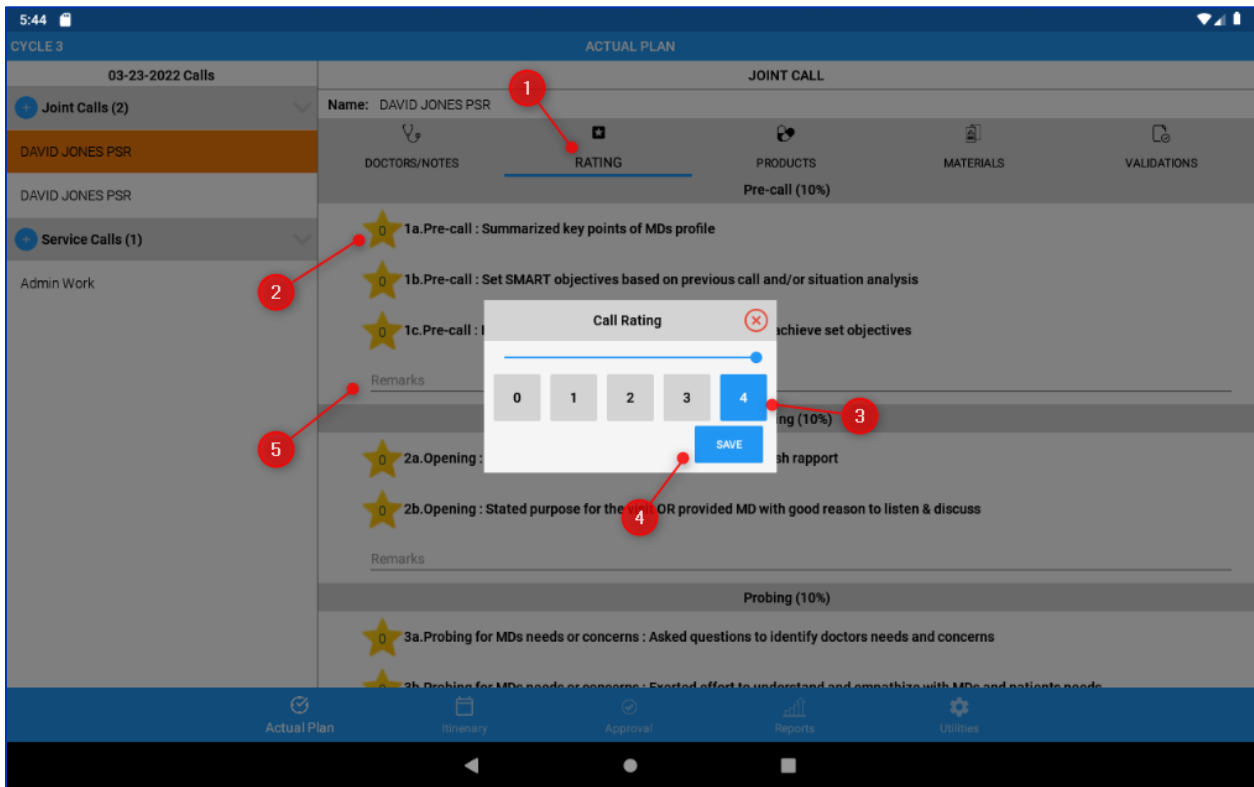
ALIMAN, MARIANITA

SELECT

Actual Plan

Utilities

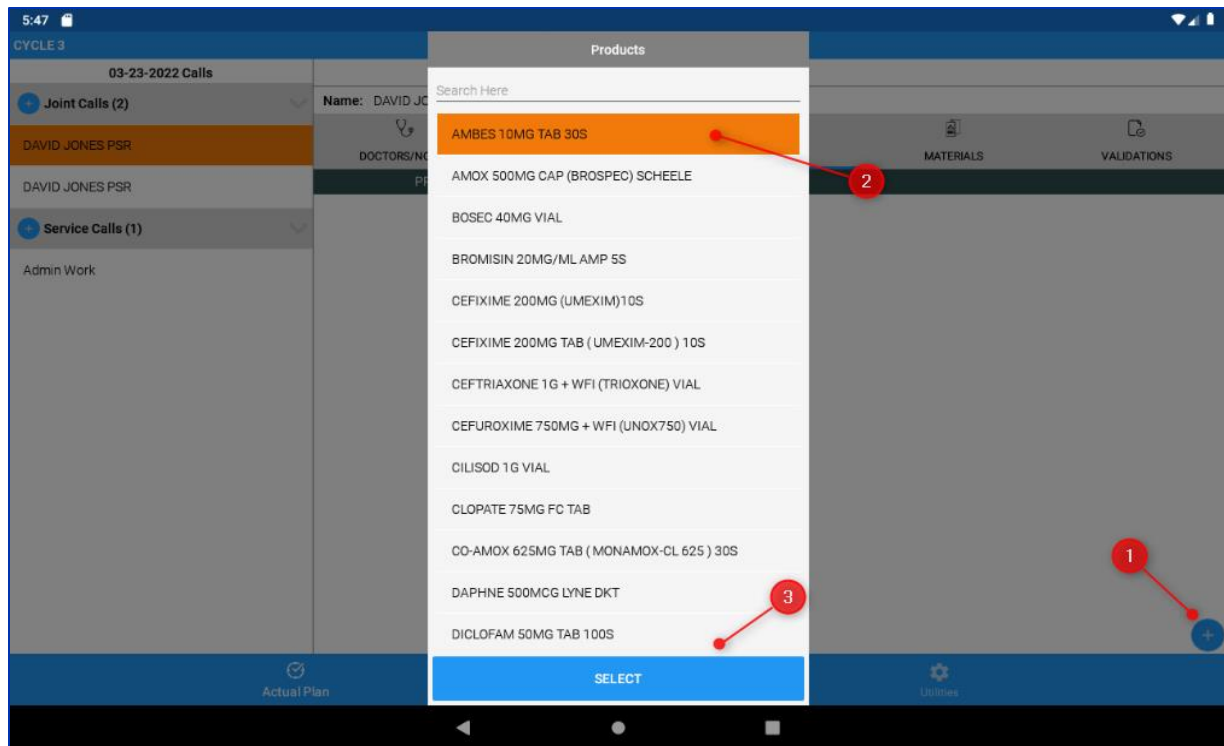
#Performance Rating



1. Go to [Rating](#) Tab
2. Tap [Start Icon](#)
3. Rate between 0-4
4. Tap [Save](#) when done, repeat process on all area
5. Add remarks every category of rating

#Products and Materials

1. Go to Products or Materials tab. Tap **+** to search for product/material
2. Search and select product/material
3. Tap **Select** to add to your list
4. To **Remove** product/material, tap remove icon before respective names



#Validation

Write your observation and have your PSR/PTR signed then tap [Save Icon](#) to close and save call. Once saved, you cannot edit call details.

The screenshot shows the 'Validation' screen in the SFADM app. The top bar is blue with the title 'ACTUAL PLAN'. Below it, a sidebar on the left lists '03-23-2022 Calls' with two items: 'Joint Calls (2)' and 'Service Calls (1)'. The 'Joint Calls (2)' item is expanded, showing 'DAVID JONES PSR' and 'Admin Work'. The main area is titled 'JOINT CALL' and shows 'Name: DAVID JONES PSR'. Below this is a horizontal menu with icons for 'DOCTORS/NOTES', 'RATING (95%)', 'PRODUCTS', 'MATERIALS', and 'VALIDATIONS'. The 'VALIDATIONS' tab is selected, showing 'DM's Observation' with a 'RATING: 95%' in red. The observation text is 'Remarkable Performance'. Below the text is a large signature area with a black ink signature and a 'clear' button. At the bottom is a blue navigation bar with icons for 'Actual Plan', 'Itinerary', 'Approval', 'Reports', and 'Utilities'.

For other devices, use may be prompted a [permission](#) allow app to access your location. Tap [Allow](#) and your good to go.

This screenshot is identical to the one above, but with a location permission dialog box overlaid in the center. The dialog box has a location pin icon and the text 'Allow SFADM to access this device's location?'. It has two buttons: 'DENY' and 'ALLOW'. The background of the app is dimmed.

#Service Calls

1. Select Service Call
2. Add [Attendees](#) (Optional)
3. You can remove attendee by tapping [remove icon](#) before its name
4. Write [remarks](#) for this service
5. Tap [Save Call](#) to apply changes

CYCLE 3 **ACTUAL PLAN**

03-23-2022 Calls

Joint Calls (2)

DAVID JONES PSR

DAVID JONES PSR

Service Calls (1)

Admin Work

ADMIN WORK

ATTENDEES

(PSR/PTR) DAVID JONES PSR

REMARKS

Admin work at office

SAVE CALL

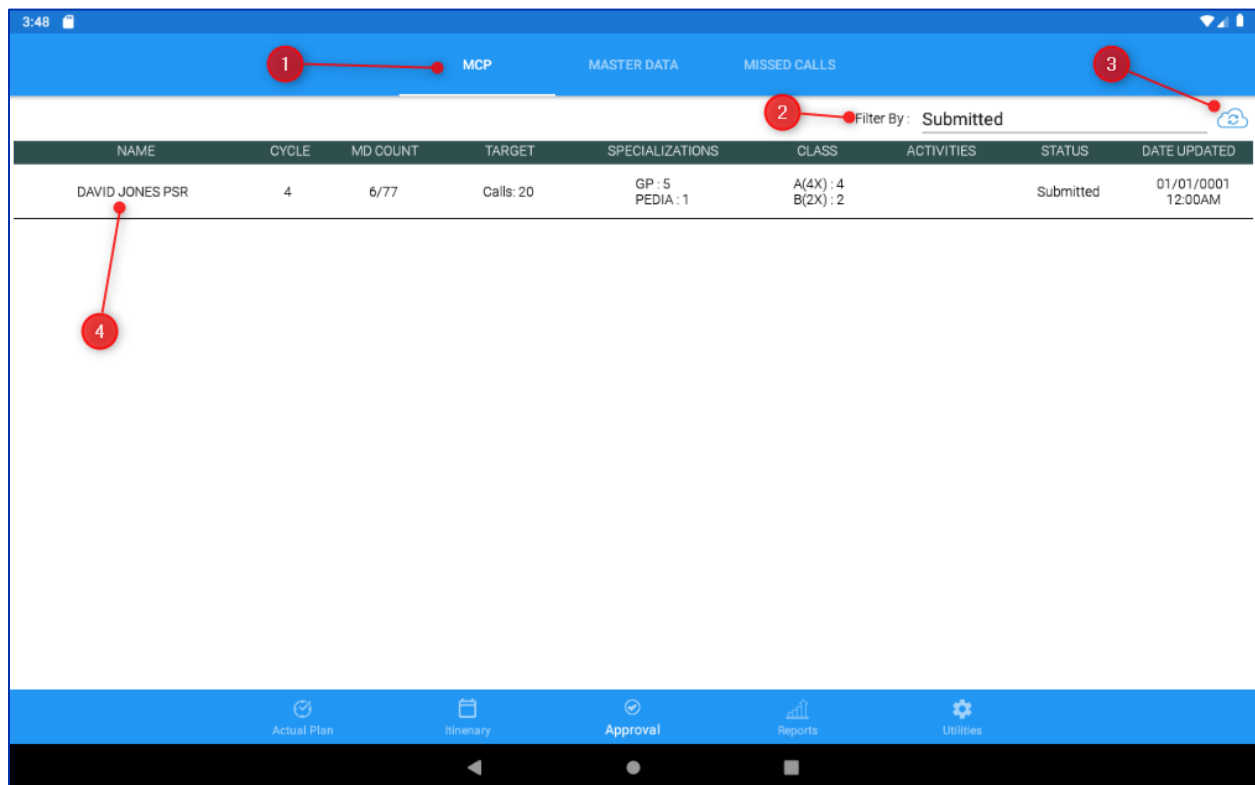
#Approval (For DM use only)

#Plan Approval

This module lets you check your PSR/PTR plans for next cycle. Once plan is submitted, you can [approve or disapprove](#) it.

Note: Plan Approval requires internet connection to upload plan status after taking action.

1. Go to [Approval Tab](#) at bottom navigation then go to [MCP](#)
2. Filter plan [status](#) (Submitted | Draft | Approved | Disapproved)
3. [Sync Plans](#) to get latest plans from server
4. List all plans based on indicated filter
5. Tap plan to view as well as Approve/Disapprove



You can display plan details as list or calendar to be toggled by the buttons at top right part of the screen.

3:49

Cycle 4

Doctors Count: 6

Call Count: 20

DOCTORS

CALENDAR

BACK

DATE	MD NAME	SPECIALIZATION	CLASS	INSTITUTION
2022-04-01	GARCIA, JONATHAN	GP	CLASS B	CALBAYOG SANITARIUM HOSPITAL
2022-04-01	HILL, SHEILA	PEDIA	CLASS B	GENERAL CLINIC
2022-04-01	CAMPBELL, LOU	GP	CLASS A	GENERAL CLINIC
2022-04-01	DAVIS, MAILOU	GP	CLASS A	ALLEN DISTRICT HOSPITAL
2022-04-01	WILSON, ANA TERESITA	GP	CLASS A	ALLEN DISTRICT HOSPITAL
2022-04-01	JOHNSON, MA. RIZALINA	GP	CLASS A	ALLEN DISTRICT HOSPITAL
2022-04-04	DAVIS, MAILOU	GP	CLASS A	ALLEN DISTRICT HOSPITAL
2022-04-05	CAMPBELL, LOU	GP	CLASS A	GENERAL CLINIC
2022-04-05	WILSON, ANA TERESITA	GP	CLASS A	ALLEN DISTRICT HOSPITAL
2022-04-06	JOHNSON, MA. RIZALINA	GP	CLASS A	ALLEN DISTRICT HOSPITAL
2022-04-07	GARCIA, JONATHAN	GP	CLASS B	CALBAYOG SANITARIUM HOSPITAL
2022-04-07	HILL, SHEILA	PEDIA	CLASS B	GENERAL CLINIC
2022-04-11	DAVIS, MAILOU	GP	CLASS A	ALLEN DISTRICT HOSPITAL

APPROVE

DISAPPROVE

Actual Plan

Itinerary

Approval

Reports

Utilities

3:49

Cycle 4

Doctors Count: 6

DOCTORS

CALENDAR

BACK

Call Count: 20

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					6	
Mar 27	Mar 28	Mar 29	Mar 30	Mar 31	Apr 01	Apr 02
	1	2	1	2		
Apr 03	Apr 04	Apr 05	Apr 06	Apr 07	Apr 08	Apr 09
	1	2	1			
Apr 10	Apr 11	Apr 12	Apr 13	Apr 14	Apr 15	Apr 16
	1	2	1			
Apr 17	Apr 18	Apr 19	Apr 20	Apr 21	Apr 22	Apr 23
Apr 24	Apr 25	Apr 26	Apr 27	Apr 28	Apr 29	Apr 30

APPROVE

DISAPPROVE

Actual Plan

Itinerary

Approval

Reports




Utilities

#Doctor Addition/Deletion Approval (MDU)

As part of the new feature of Simple SFA that lets PSR/PTR to request addition and removal of MD/Drugstore, this app has feature to view and approve request.

Note: MD Approval requires internet connection to upload plan status after taking action.

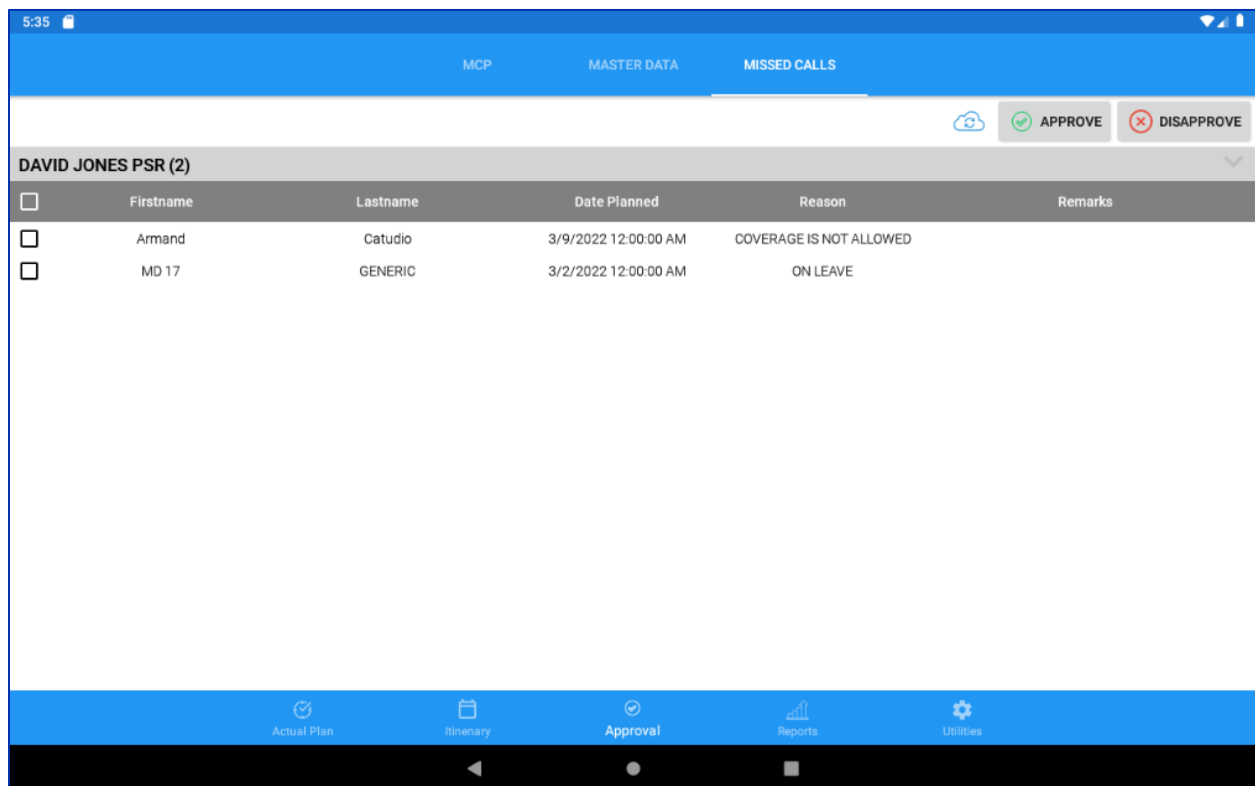
1. Go to [Approval Tab](#) at bottom navigation then go to [Master Data](#)
2. [Sync Data](#) to get latest entries from server
3. Check record to manage (Multiple selection is supported)
5. Tap Approve/Disapprove

MCP MASTER DATA MISSED CALLS							
  APPROVE  DISAPPROVE							
CHARLES MILLER PSR (4)							
<input type="checkbox"/>	Firstname	Lastname	M.I	Doctor Class	Specialization	Institution name	Type
<input checked="" type="checkbox"/>	KATHY	GOMEZ		CLASS A	GENERIC	NAVAL DISTRICT HOSPITAL	Deletion
<input checked="" type="checkbox"/>	BRENDA	SANCHEZ		CLASS A	ENT	BETHANY HOSPITAL	New
<input type="checkbox"/>	JOYCE	TORRES		CLASS A	GP	BETHANY HOSPITAL	New
<input type="checkbox"/>	ALBERT	FLORES		CLASS A	GENERIC	NAVAL DISTRICT HOSPITAL	Deletion
DAVID JONES PSR (4)							
<input type="checkbox"/>	Firstname	Lastname	M.I	Doctor Class	Specialization	Institution name	Type
<input type="checkbox"/>	ADRIAN	SILVA		CLASS A	GP	GENERAL HOSPITAL	New
<input type="checkbox"/>	STEPHEN	ORTIZ		CLASS A	ENT	CALBAYOG DISTRICT HOSPITAL	New
<input type="checkbox"/>	WILDA	CORDOVA		CLASS A	ENT	BASEY DISTRICT HOSPITAL	New
<input type="checkbox"/>	CHERRY	ARELLANO		CLASS A	GENERIC	BASEY DISTRICT HOSPITAL	Deletion

#Missed Call Approval

Note: MD Approval requires internet connection to upload plan status after taking action.

1. Go to [Approval Tab](#) at bottom navigation then go to [Missed Calls](#)
2. [Sync Data](#) to get latest entries from server
3. Check record to manage (Multiple selection is supported)
5. Tap Approve/Disapprove



#END