

Simple SFA User Guide

Created by: Training Team

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Purpose

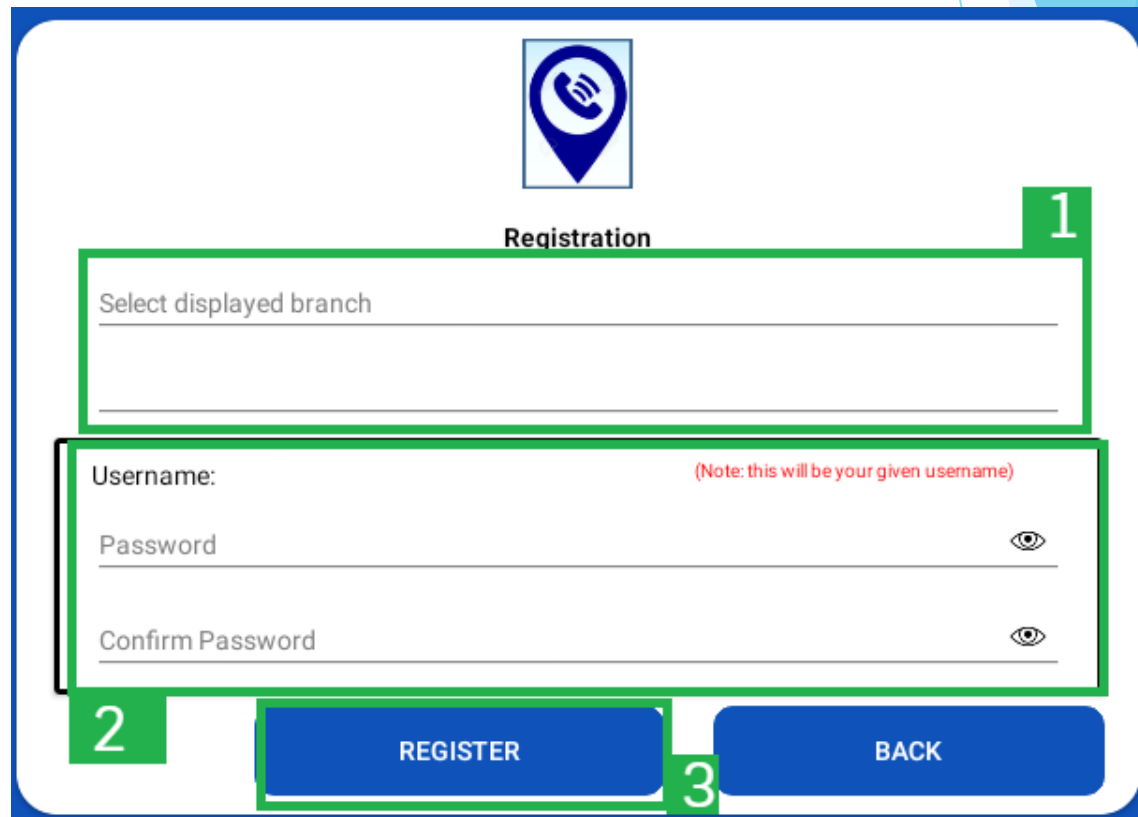
- ▶ The Simple SFA User Guide contains all essential information on how to make full use of the mobile application.
- ▶ This Guide includes images, descriptions and step-by-step procedures that a Simple SFA user can follow on how to operate the application and use it in their work.

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.



The screenshot shows a mobile application registration screen. At the top is a blue icon of a hand pointing to a location pin. Below it is the title "Registration". The form contains three main sections: 1. A dropdown menu labeled "Select displayed branch" with a green box and the number 1. 2. A section for "Username:" (with a red note: "(Note: this will be your given username)"), "Password", and "Confirm Password", each with an eye icon for toggling visibility. This section is enclosed in a green box with the number 2. 3. Two blue buttons at the bottom: "REGISTER" and "BACK". The "REGISTER" button is enclosed in a green box with the number 3.

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.



☒ Synchronize ☐ Show Password

1

LOGIN

UTILITIES

2

[Registration](#)

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.



Username _____

Password _____

☐ Synchronize ☐ Show Password

UTILITIES

LOGIN

1 UTILITIES

[Registration](#)

IMPORT DATA **CLEAR DATA**

EXPORT DATA **SEND ERROR LOG**

CHECK CONNECTIVITY 2 **CHECK LOCATION**

Network Information

Connection: "AndroidWifi"

Status: **Available**

Internet: **Available** **3**

Average Latency: **1169 ms**

Host Status: **Server Available**

IMEI: 500cb9f4495c290c

REFRESH 4

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.



Username

Password

☒ Synchronize

☐ Show Password

LOGIN

UTILITIES

[Registration](#)

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.

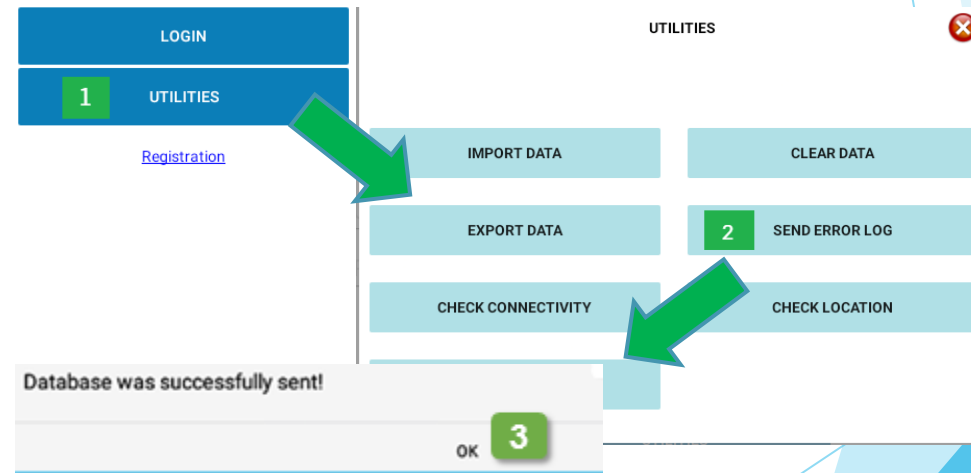
3. Tap the **OK** Button.



Username _____

Password _____

☐ Synchronize ☐ Show Password



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.



Username

Password

☐ Synchronize

☐ Show Password

LOGIN

1 UTILITIES

[Registration](#)

UTILITIES

IMPORT DATA

CLEAR DATA

EXPORT DATA

SEND ERROR LOG

CHECK CONNECTIVITY

CHECK LOCATION

ABOUT US

Database was successfully exported to /com.sstscs.simplesfa/files/Backup.



OK



Dashboard Module

Call Report [Cycle 1 - Thursday, January 28, 2021]

FILTER

Search doctor...

Call Rate

6.58%

(5/76)

Call Reach

17.86%

(5/28)

Call Frequency

0%

(0/28)

Incidental Call

1

Declared Missed

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

Dashboard

Quick Signature

ACP

MCP

More



Doctors / Account Information Module

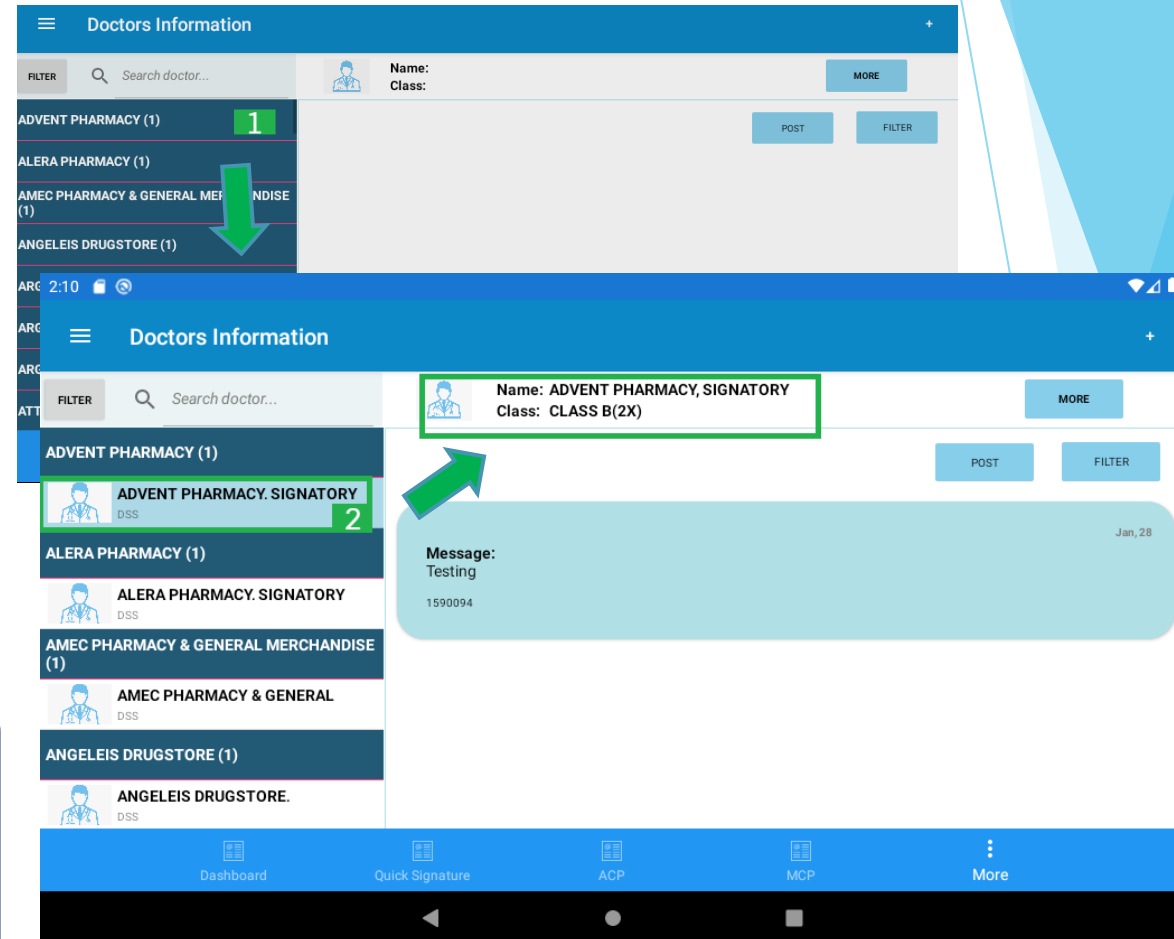
Displaying a Customer's Information

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.

The image shows a sequence of five screenshots illustrating the steps to add a customer's information:

- Step 1:** A list of customers is displayed. The 'MORE' button is highlighted with a green arrow and the number 1.
- Step 2:** The 'DOCTOR INFORMATION' form is shown. The 'SET TIME' button is highlighted with a green arrow and the number 2.
- Step 3:** A time picker dialog is shown, displaying the time 2:20 AM. The 'OK' button is highlighted with a green arrow and the number 3.
- Step 4:** The 'DOCTOR INFORMATION' form is shown again, with the time updated to 02:20. The 'CLOSE' button is highlighted with a green arrow and the number 4.
- Step 5:** The final 'DOCTOR INFORMATION' form is shown, with the 'UPDATE' button highlighted with a green arrow and the number 5.

The 'DOCTOR INFORMATION' form contains the following fields:

- Name: ALERA PHARMACY, SIGNATORY
- CODE: DA11030024
- CLASS: CLASS B(2X)
- SPECIALIZATION: DSS
- BEST TIME TO CALL: 05:20 PM
- EMAIL ADDRESS: example@gmail.com
- CONTACT NUMBER: ex. 09*****
- PRC LICENSED: ex. DSA-4564-asdc



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.

Master Coverage Plan [Cycle 1] APPROVED on 2021-01-12T09:42:56

SAVE TO CALLS

MENU

REFRESH

FILTER

Search doctor...

NAME: AMEC PHARMACY & GENERAL MERCHANDISE, CODE: DA11030097

CLASS: CLASS B(2X)

BEST TIME TO CALL:

ADVENT PHARMACY (1)

ALERA PHARMACY (1)

AMEC PHARMACY & GENERAL MERCHANDISE (1)

1

AMEC PHARMACY & GENERAL

DSS

Plan: 2/2

2

ANGELEIS DRUGSTORE (1)

ARGUELLES PHARMACY 1 (1)

ARGUELLES PHARMACY 1.

DSS

Plan: 2/2

4

Doctor Count: 51

Sun	Mon	Tue	Wed	Thu	Fri	Sat
Dec 27	Dec 28	Dec 29	Dec 30	Dec 31	Jan 01	Jan 02
	2	2	3	32	2	
Jan 03	Jan 04	Jan 05	Jan 06	Jan 07	Jan 08	Jan 09
	2	3	4	6	4	
Jan 10	Jan 11	Jan 12	Jan 13	Jan 14	Jan 15	Jan 16
	3	4	7	10	3	
Jan 17	Jan 18	Jan 19	Jan 20	Jan 21	Jan 22	Jan 23

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.

The screenshot displays the 'Master Coverage Plan [Cycle 1]' interface. At the top, it shows the status 'APPROVED on 2021-01-12T09:42:56' and buttons for 'SAVE TO CALLS', 'MENU' (highlighted with a green box and number 1), and 'REFRESH'. Below this is a search bar and a list of pharmacies: 'AMEC PHARMACY & GENERAL MERCHANDISE (1)', 'ANGELEIS DRUGSTORE (1)', 'ARGUELLES PHARMACY 1 (1)', 'ARGUELLES PHARMACY 2 (1)', and 'ARGUELLES PHARMACY 3 (1)'. A calendar view shows dates from Dec 27 to Jan 16, with visit counts for each day. A green arrow points from the 'MENU' button to a modal window titled 'Master Coverage Plan'. The modal contains details for 'Cycle 1' (Jan-2021) and 'Cycle 2' (Feb-2021), including Plan Count, Doctor Count, and Max Visit Per Week. At the bottom of the modal, there are two buttons: 'SYNC PLAN' (highlighted with a green box and number 2) and 'LOAD MCP'.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Dec 27							
Dec 28		2	2	3	2	2	
Dec 29							
Dec 30							
Dec 31							
Jan 01							
Jan 02							
Jan 03							
Jan 04		2	3	4	6	4	
Jan 05							
Jan 06							
Jan 07							
Jan 08							
Jan 09							
Jan 10							
Jan 11							
Jan 12							
Jan 13							
Jan 14							
Jan 15							
Jan 16							

Master Coverage Plan

Cycle 1
Jan-2021
Created On
APPROVED
Plan Count: 76
Doctor Count: 28/51
Max Visit Per Week: 2
On 2021-01-12T09:42:56

Cycle 2
Feb-2021
Created On
APPROVED
Plan Count: 72
Doctor Count: 26/51
Max Visit Per Week: 2
On 2021-01-12T09:42:56

SYNC PLAN **LOAD MCP**

Checking the Submitted MCP Status

1. Click the Menu bar

It displays the following Status

- Draft
- Submitted
- Disapproved
- Approved

The screenshot displays the 'Master Coverage Plan' interface. At the top, the title bar shows 'Master Coverage Plan [Cycle 1] APPROVED on 2021-01-12T09:42:56'. Below this, there are buttons for 'SAVE TO CALLS', 'MENU', and 'REFRESH'. A green box with the number '1' highlights the 'MENU' button. A green arrow points to the 'MENU' button. The main content area shows a list of plans on the left and a detailed view of the selected plan on the right. The detailed view shows the following information:

Plan Name	Plan Count	Doctor Count	Max Visit Per Week	Status	Created On
Cycle 1 Jan-2021	76	28/51	2	APPROVED	On 2021-01-12T09:42:56
Cycle 2 Feb-2021	72	26/51	2	APPROVED	On 2021-01-12T09:42:56

At the bottom of the detailed view, there are two buttons: 'SYNC PLAN' and 'LOAD MCP'.

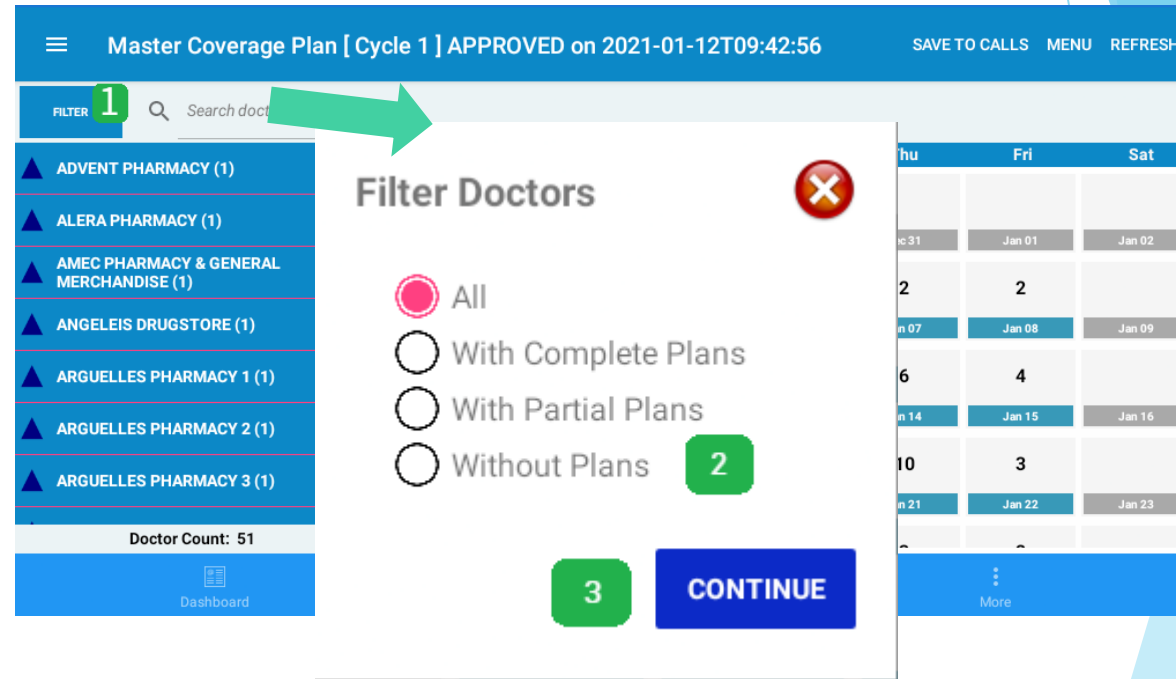
Checking for Unplotted Calls

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

The screenshot shows the 'Master Coverage Plan [Cycle 1] APPROVED on 2021-01-12T09:42:56' screen. The interface includes a top bar with 'SAVE TO CALLS', 'MENU', and 'REFRESH' buttons. A list of pharmacies is on the left, and a calendar grid shows visit counts for each day. A modal window displays details for 'Cycle 1' and 'Cycle 2'. Numbered callouts and arrows indicate the following steps:

- 1**: Tap on the 'MENU' button in the top bar.
- 2**: Tap on 'Cycle 1' in the modal window.
- 3**: Tap on the 'LOAD MCP' button in the modal window.
- 4**: Tap on the 'SAVE TO CALLS' button in the top bar.

Master Coverage Plan Details:

Cycle	Plan Count	Doctor Count	Max Visit Per Week	On
Cycle 1 Jan-2021	76	28/51	2	2021-01-12T09:42:56
Cycle 2 Feb-2021	72	26/51	2	2021-01-12T09:42:56

Pharmacy List:

- ADVENT PHARMACY (1)
- ALERA PHARMACY (1)
- AMEC PHARMACY & GENERAL MERCHANDISE (1)
- ANGELEIS DRUGSTORE (1)
- ARGUELLES PHARMACY 1 (1)
- ARGUELLES PHARMACY 2 (1)
- ARGUELLES PHARMACY 3 (1)

Calendar Grid (Visits per Day):

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Dec 27							
Dec 28		2	2	3	2	2	
Dec 29							
Dec 30							
Dec 31							
Jan 01							
Jan 02							
Jan 03							
Jan 04		2	3	4	6	4	
Jan 05							
Jan 06							
Jan 07							
Jan 08							
Jan 09							
Jan 10		3	4	7	10	3	
Jan 11							
Jan 12							
Jan 13							
Jan 14							
Jan 15							
Jan 16							
Jan 17							
Jan 18							
Jan 19							
Jan 20							
Jan 21							
Jan 22							
Jan 23							

Doctor Count: 51



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.

The screenshot displays the 'Actual Coverage Plan [Cycle 1] Tuesday, January 26 2021' interface. At the top, there are 'SYNC CALLS' and 'REFRESH' buttons. Below the header, a search bar is labeled 'Search doctor...'. The main content area shows 'NAME: FARMACIA GALICIA.' and 'CLASS: CLASS B(2X)'. A 'SIGN' button is highlighted with a green box and a green '6' in the top right corner. Below this, there are tabs for 'NOTES', 'PRODUCTS', 'DETAILING AID', and 'CALENDAR'. The 'CALENDAR' tab is active, showing a weekly view with days from Sun to Sat. A large white space for signing is visible, with a green '7' in the top right corner. Below the signing area, there is a red text prompt: 'I hereby acknowledge that I was visited and received the following:'. Below this prompt is a line for the signature, labeled 'Signature'. At the bottom, there are four buttons: 'CAMERA', 'SIGN MATCH', 'CLEAR', and 'SAVE'. The 'SAVE' button is highlighted with a green box and a green '8' in the bottom right corner. The bottom navigation bar includes 'Dashboard', 'Quick Signature', 'ACP', 'MCP', and 'More'.

Conducting a Call

- ▶ Alternative to signing signatures:
 - Tap the camera button.
 - Take a picture alongside with your customer.

Matched: 0/5

I hereby acknowledge that I was visited and received the following:

Signature

CAMERA SIGN MATCH CLEAR SAVE

Dashboard Quick Signature ACP MCP More

Conducting a Call

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

Actual Coverage Plan [Cycle 1] Tuesday, January 26 2021]

10

SYNC CALLS

REFRESH

FILTER

Search doctor...

NAME: EGGZ PHARMACY,
CLASS: CLASS A(4X)

☐ Work With

EGGZ PHARMACY (1)

EGGZ PHARMACY. SIGNATORY
DSS
Call: 1/2

FARMACIA GALICIA (1)

FARMACIA GALICIA. SIGNATORY
DSS
Call: 0/2

FIFTH PHARMACY (1)

FIFTH PHARMACY. SIGNATORY
DSS
Call: 1/2

LY INFANT PHARMACY (1)

LY INFANT PHARMACY
Doctor Count: 4

NOTES

PRODUCTS

DETAILING AID

CALENDAR

+ NOTES

9

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.

The screenshot displays the 'Actual Coverage Plan [Cycle 1] Wednesday, January 20 2021' screen. The interface includes a top navigation bar with 'SYNC CALLS' and 'REFRESH' options. Below the header, there's a search bar and a list of customers: 'BONIFACIO DRUG (1)' and 'CERILLO PHARMACY (1)'. The 'BONIFACIO DRUG. SIGNATORY' is selected, and the 'NOTES' tab is active. A green box labeled '1' highlights the 'NOTES' tab, and another green box labeled '2' highlights the customer selection. A green arrow labeled '3' points to the '+ NOTES' button. Below this, a green box labeled '4' highlights the text input area for the pre-call note, which contains the placeholder text 'Pre Call' and 'Enter your note here...'. A green box labeled '5' highlights the 'SAVE' button at the bottom right.

Actual Coverage Plan [Cycle 1] Wednesday, January 20 2021

NAME: BONIFACIO DRUG, CLASS: CLASS B(2X) ☐ Work With **CALL NOW** **RESCHEDULE CALL**

NOTES **PRODUCTS** **DETAILING AID** **CALENDAR**

+ NOTES

Actual Coverage Plan [Cycle 1] Wednesday, January 20 2021

ACP Notes for Dr. BONIFACIO DRUG, SIGNATORY

Pre Call

Enter your note here...

SAVE

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.

Actual Coverage Plan [Cycle 1] Friday, January 22 2021] SYNC CALLS REFRESH

FILTER Search doctor... NAME: FARMACIA LANCEE, CLASS: CLASS B(2X) Work With 3 RESCHEDULE CALL

FARMACIA LANCEE (1) NOTES PRODUCTS DETAILING AID CALENDAR

FARMACIA LANCEE, SIGNATORY DSS Call: 0/4 2

Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jan 03	0/2 Jan 04	0/2 Jan 05	0/3 Jan 06	0/2 Jan 07	0/2 Jan 08	Jan 09
Jan 10	0/2 Jan 11	0/3 Jan 12	0/4 Jan 13	0/6 Jan 14	0/4 Jan 15	Jan 16
Jan 17	0/3 Jan 18	0/4 Jan 19	0/7 Jan 20	0/10 Jan 21	0/3 Jan 22	1 Jan 23

Doctor Count: 1 Dashboard

Actual Coverage Plan [Cycle 1] Friday, January 22 2021]

Reschedule Call for Dr. FARMACIA LANCEE, SIGNATORY 4

Select Reason

1/23/2021

Enter your remarks here...

5

SAVE

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.

The screenshots illustrate the process of recovering a call in a mobile application. The first screenshot shows the 'Actual Coverage Plan' for 'HOLY INFANT' (Cycle 1, Tuesday, January 19, 2021). The interface includes a search bar, a list of customers (BONIFACIO DRUG (1) and HOLY INFANT PHARMACY (1)), and a calendar view. The 'CALL NOW' button is highlighted with a green arrow. The second screenshot shows the 'SIGN' button highlighted with a green arrow. The third screenshot shows a signature being entered in a box, with a 'SAVE' button highlighted by a green arrow. The signature box also displays 'Matched: 0/5' and a '5' in a green box. Below the signature box, there is a red text prompt: 'I hereby acknowledge that I was visited and received the following:'. At the bottom, there are buttons for 'SIGN MATCH', 'CLEAR', and 'SAVE', with a '6' in a green box next to the 'SAVE' button.

Incidental Call

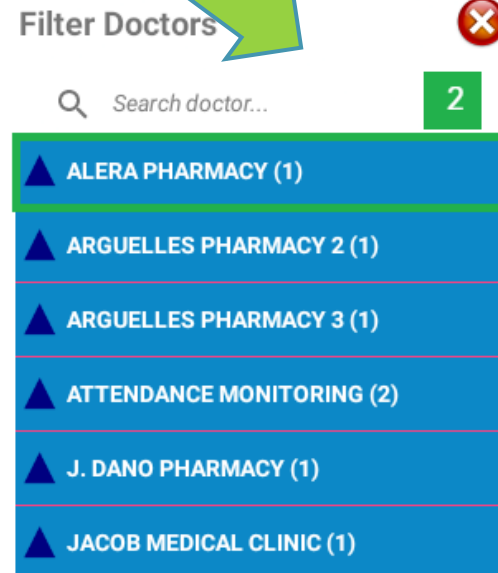
These are the following steps on how to conduct an incidental call.

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.

The main interface features a sidebar menu on the left with sections: 'ATTENDANCE MONITORING (2)' containing 'TIME IN. FRIDAY' and 'TIME OUT. FRIDAY' (both with 'ATT' icons and 'Call: 1/8'), and 'HOLY INFANT PHARMACY (1)' containing 'HOLY INFANT PHARMACY.' (with a 'DSS' icon and 'Call: 1/4'). A green box labeled '1' highlights a '+' button at the bottom of the sidebar. The main area has a 'Work With' checkbox and tabs for 'NOTES', 'PRODUCTS', 'DETAILING AID', and 'CALENDAR'. The 'CALENDAR' tab is active, showing a grid from Dec 27 to Jan 16. Numerical values are present in several cells, such as '0/2' on Mon Jan 04, '0/3' on Tue Jan 05, '0/4' on Wed Jan 06, '0/2' on Thu Jan 07, '0/2' on Fri Jan 08, '0/2' on Mon Jan 11, '0/3' on Tue Jan 12, '0/4' on Wed Jan 13, '0/6' on Thu Jan 14, '4/4' on Fri Jan 15, '0/2' on Mon Jan 18, '0/4' on Tue Jan 19, '1/6' on Wed Jan 20, '0/10' on Thu Jan 21, and '0/3' on Fri Jan 22.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Dec 27							
Dec 28							
Dec 29							
Dec 30							
Dec 31							
Jan 01							
Jan 02							
Jan 03							
Jan 04		0/2	0/2	0/3	0/2	0/2	
Jan 05							
Jan 06							
Jan 07							
Jan 08							
Jan 09							
Jan 10							
Jan 11		0/2	0/3	0/4	0/6	4/4	
Jan 12							
Jan 13							
Jan 14							
Jan 15							
Jan 16							
Jan 17							
Jan 18		0/2	0/4	1/6	0/10	0/3	
Jan 19							
Jan 20							
Jan 21							
Jan 22							



CALL
NOW

4

CALL
NOW

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.

Actual Coverage Plan [Cycle 1] Tuesday, January 19 2021

SYNC CALLS REFRESH

FILTER Search doctor...

NAME: BONIFACIO DRUG, CLASS: CLASS B(2X)

Work With CALL NOW DECLARE MISSED CALL

ATTENDANCE MONITORING (3)

- TIME IN. MONDAY ATT Call: 0/8
- TIME IN. TUESDAY ATT Call: 0/8
- TIME OUT. TUESDAY ATT Call: 0/8

BONIFACIO DRUG (1)

- BONIFACIO DRUG, SIGNATORY DSS Call: 1/4

NOTES	PRODUCTS	DETAILING AID	CALENDAR			
Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jan 03	Jan 04	Jan 05	Jan 06	Jan 07	Jan 08	Jan 09
Jan 10	Jan 11	Jan 12	Jan 13	Jan 14	Jan 15	Jan 16
Jan 17	Jan 18	Jan 19	Jan 20	Jan 21	Jan 22	Jan 23

Actual Coverage Plan [Cycle 1] Tuesday, January 19 2021

Declare Missed Call for Dr. BONIFACIO DRUG, SIGNATORY

Select Reason

Enter your remarks here...

4

5 SAVE



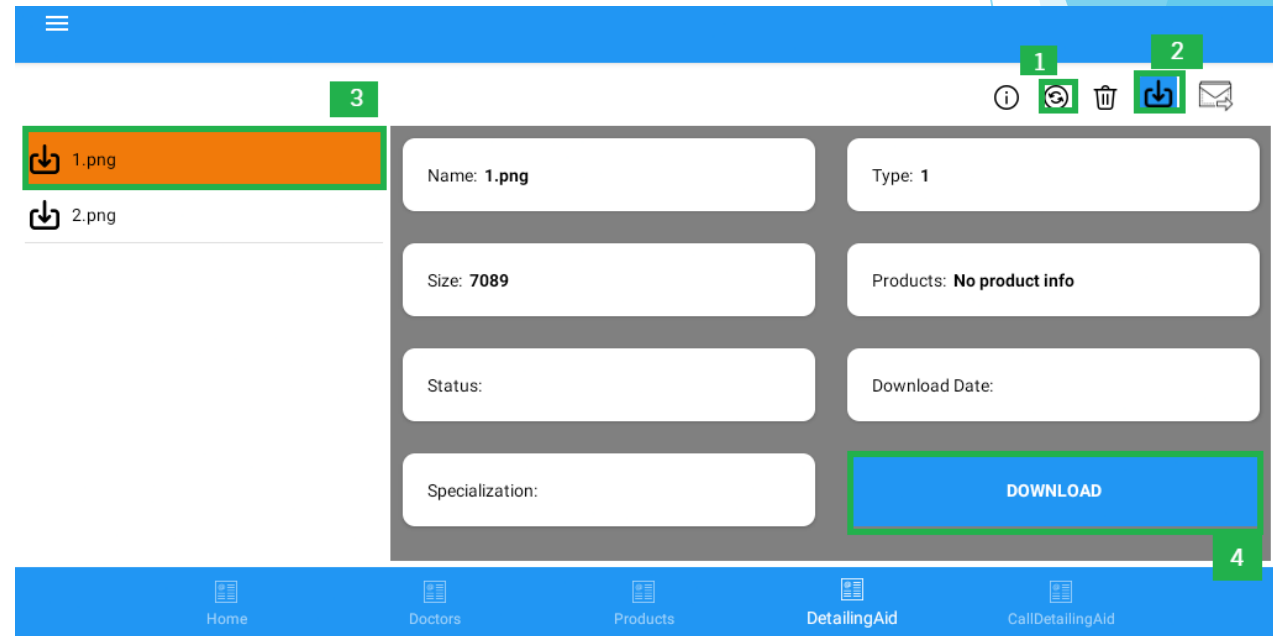
Detailing Aid Module

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



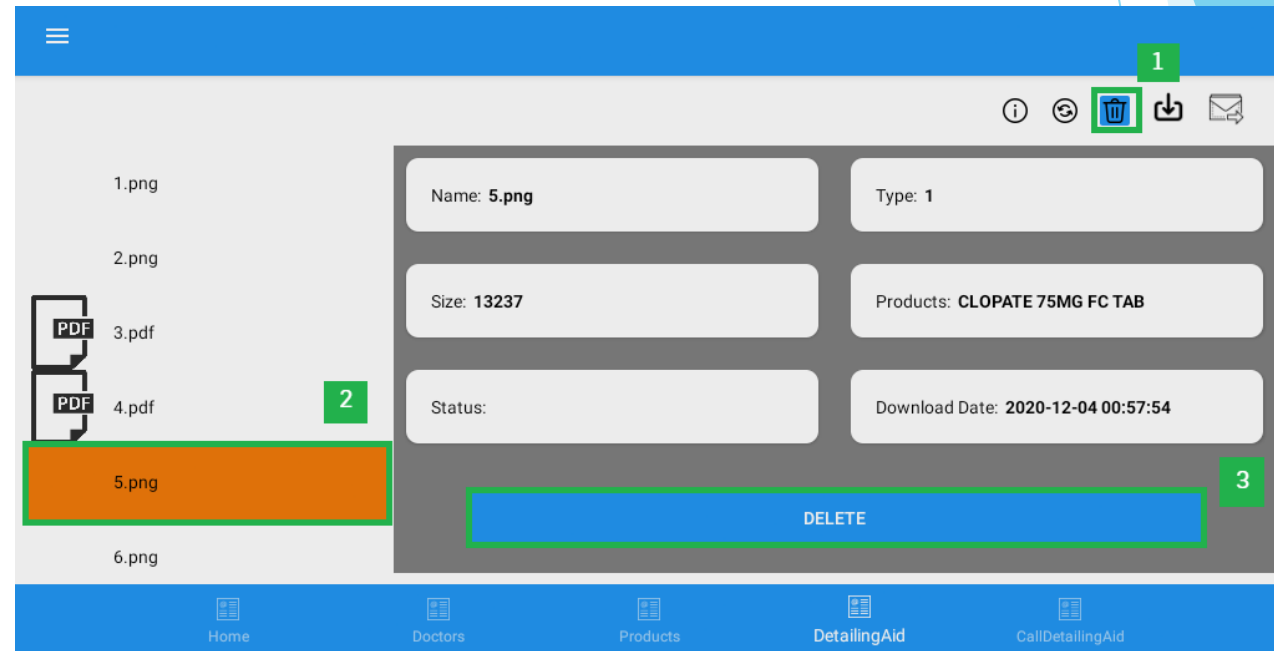
Deleting a Detailing Aid

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



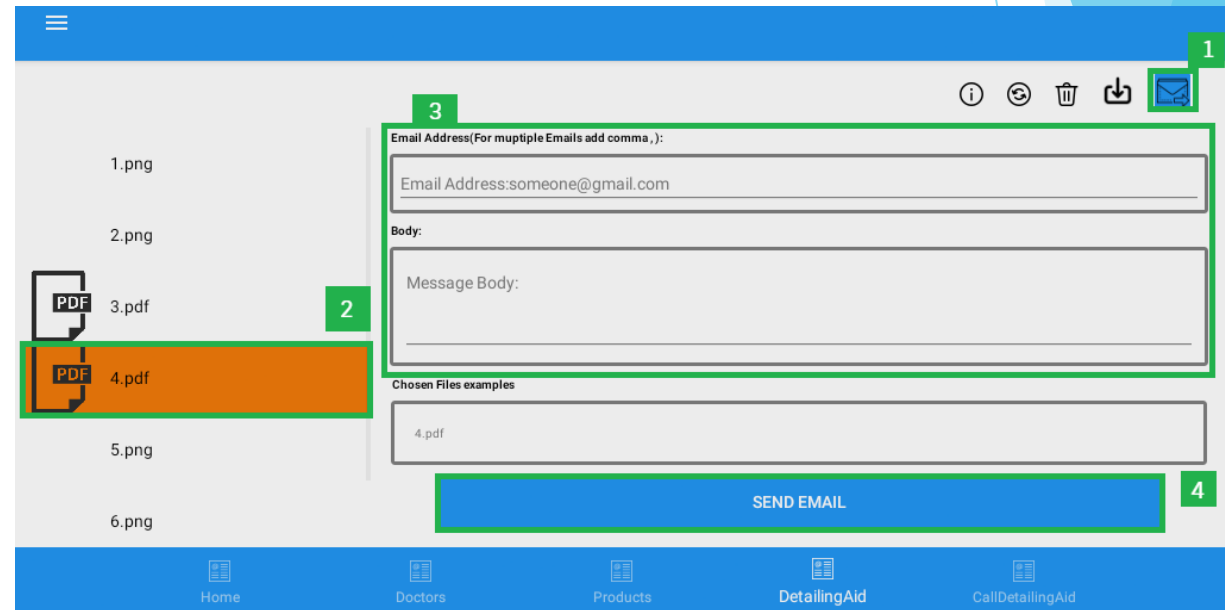
Sending a Detailing aid via E-mail Message

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.

The screenshot displays the Quicksign interface. At the top right, there is a status indicator that reads "Matched: 0/5". The main area is a large white rectangle, labeled with a green box containing the number "1", intended for the user to collect a signature. Below this area is a horizontal line, and underneath it, the word "Signature" is centered. At the bottom of the interface, there are two blue buttons: "CLEAR" on the left and "SAVE" on the right. The "SAVE" button is highlighted with a green box containing the number "2".

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.

