

MedPlus Audit Dashboard - Complete UI & Functional Documentation

Document Purpose

This document provides comprehensive, screen-level functional documentation of the MedPlus Audit Dashboard application. It is designed for managerial and non-technical audiences to understand what the system does and how users interact with it.

Document Organization:

This documentation follows the logical user journey through the application, starting from the main dashboard and drilling down into each functional area.

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Key Features by Screen

Dashboard - Store Coverage:

- Summary metrics (Total/Covered/Uncovered stores)
- Store Recency Analysis chart

- Inventory metrics
- Deviation distribution analysis
- Product form distribution

Total Stores - Details:

- Complete store directory
- Search and filter functionality
- Export capabilities
- Store status and inventory values

Live Audit Schedule:

- Real-time audit progress tracking
- Status summary cards
- Auditor assignments
- Progress bars and completion metrics

Auditor Performance:

- Individual auditor productivity metrics
- Match rates and edit rates
- Top performers and attention needed lists
- Comprehensive performance table

Supervisor Approvals:

- Supervisor workload monitoring
- Audit oversight metrics
- Performance tracking by supervisor
- Value oversight and quality management

Store PID Allotment:

- PID assignment management
- Audit task distribution
- Status tracking (assigned/unassigned/in progress/completed)
- Bulk assignment operations

Modal Deep Dives

Store Detail Modal:

- Opened from: Live Audit Schedule screen
- Shows: Store-specific audit progress, PIDs, SKUs, deviations, assigned auditors

- Actions: Download reports, view real-time progress

Audit Detail Modal:

- Opened from: Supervisor/Auditor detail modals, Live Audit Schedule
- Shows: Complete audit breakdown, re-audit summary, participating auditors
- Actions: Export data, expand auditor details

Auditor Detail Modal:

- Opened from: Auditor Performance screen
- Shows: Individual auditor performance history, deviation metrics, audit history
- Actions: Date filtering, download reports, view audit-specific details

Supervisor Detail Modal:

- Opened from: Supervisor Approvals screen
- Shows: Supervisor performance, days supervised, deviation summary, audit history
- Actions: Date range filtering, export reports, drill-down into specific audits

Dashboard - Store Coverage Screen

When This Screen Appears

This screen appears immediately when the application loads. It is the home screen and primary landing page. Users arrive at this screen when:

- Opening the application for the first time
- Clicking the MedPlus logo in the sidebar
- Clicking the "Store Coverage" navigation item in the sidebar
- Clicking the "Back" button from any detail screen

Complete UI Breakdown

Header Section

Application Title

- Displays "Medplus Audit Dashboard" prominently at the top

- This title remains visible across all screens in the application

Last Refreshed Indicator

- Shows the timestamp when data was last updated
- Format: "Last Refreshed: [Date], [Time]"
- Example: "Last Refreshed: 19 Dec 2025, 05:03:46 am"
- Updates automatically when the Refresh Now button is clicked

Refresh Now Button

- Blue button with circular refresh icon
- Located next to the Last Refreshed indicator
- Purpose: Manually refreshes all dashboard data

Filter Bar

The filter bar contains six dropdown fields arranged horizontally:

****Financial Year Dropdown**** (marked with red asterisk indicating required)

- First filter on the left
- Options: 2025–26, 2024–25, 2023–24, 2022–23
- Default selection: Current financial year (2025–26)
- Purpose: Filters all data to show only information from the selected financial year

State Dropdown

- Second filter from left
- Default: "All States"
- Options: All States, Tamil Nadu, Karnataka, Andhra Pradesh, Telangana, Kerala
- Purpose: Filters data to show stores and audits from specific states

Store Dropdown

- Third filter from left
- Default: "All Stores"
- Options: All Stores, Stock Hub, No Stock Hub, Regular
- Purpose: Filters by store type classification

Audit Job Type Dropdown

- Fourth filter from left
- Default: "All Types"
- Options: All Types, Full Audit, Select SKUs, Partial Audit
- Purpose: Filters by the type of audit being performed

Process Type Dropdown

- Fifth filter from left
- Default: "All Processes"
- Options: All Processes, Product Audit, Batch Audit
- Purpose: Filters by audit process methodology

Audit Status Dropdown

- Sixth filter from left (rightmost)
- Default: "All Statuses"
- Options: All Statuses, Created, In Progress, Pending, Completed
- Purpose: Filters by current status of audits

Summary Cards Section

Three prominent cards display key metrics:

Total Stores Card

- Icon: Blue store/building icon in circular background
- Main number: Large number showing total store count (e.g., 478)
- Subtitle: "Active: [number] | Inactive: [number]"
- Interactive element: "Click for details" link at bottom
- Purpose: Shows total number of stores in the system

Covered Stores Card

- Icon: Green checkmark in circular background
- Main number: Number of stores with completed audits (e.g., 418)
- Subtitle: Percentage of total (e.g., "87.4% of total")
- Interactive element: "Click for details" link at bottom
- Purpose: Shows how many stores have been audited

Uncovered Stores Card

- Icon: Red warning triangle in circular background
- Main number: Number of stores without recent audits (e.g., 60)
- Subtitle: Percentage of total (e.g., "12.6% of total")
- Interactive element: "Click for details" link at bottom
- Purpose: Highlights stores requiring attention

Store Recency Analysis Chart

Chart Header

- Title: "Store Recency Analysis" with calendar icon
- Description: "Breakdown of covered stores by days since last audit"

Time Period Buttons

- Three buttons arranged horizontally: Quarterly, Half-Yearly, Yearly
- Quarterly button is selected by default (shown in blue)
- Purpose: Changes the time grouping displayed in the chart

Bar Chart

- Displays vertical blue bars showing store counts
- X-axis: Time periods (e.g., "Jan - Mar", "Apr - Jun", "Jul - Sep", "Oct - Dec")
- Y-axis: Number of stores (scale from 0 to 120)
- Each bar represents stores audited in that time period
- Bars are uniform height when data is evenly distributed

Inventory Metrics Section

Three cards displaying inventory statistics:

Total SKUs Card

- Label: "Total SKUs"
- Large number: Count of unique products (e.g., "1,729,130")
- Subtitle: "Across all covered stores"
- Purpose: Shows total product variety being tracked

Total Quantity Card

- Label: "Total Quantity"
- Large number: Total units (e.g., "7.4Cr" meaning 7.4 Crore or 74 million)
- Subtitle: "Units in inventory"
- Purpose: Shows total volume of products

Total Inventory Value Card

- Label: "Total Inventory Value"
- Large number: Monetary value (e.g., "Rs.11769.22L" meaning 117.69 Crore Rupees)
- Subtitle: "Aggregate value"
- Purpose: Shows total financial value of inventory

Deviation Distribution Section

Section Header

- Title: "Deviation Distribution" with chart icon
- Subtitle: "Click on segments for details"

Pie Chart

- Displays a circular chart divided into colored segments
- Each segment represents a deviation type
- Clicking segments provides detailed breakdown

Legend

- Four items listed vertically with colored squares:
 - "Invoiced: Rs.5707K" (with color indicator)
 - "Contra Short: Rs.6034K" (with color indicator)
 - "Contra Excess: Rs.5714K" (with color indicator)
 - "Excess Submitted: Rs.6397K" (with color indicator)
- Purpose: Shows financial impact of different deviation categories

Deviation Summary Section

Section Header

- Title: "Deviation Summary"
- Subtitle: "Click on a pie segment for details"

Product Form Distribution Header

- "Overall Product Form Distribution"
- Subtitle: "Across all deviation types"

Pie Chart

- Circular chart showing product form breakdown
- Multiple segments in different colors
- Each segment represents a product category

Product Form List

- Ten product categories listed vertically:
 1. Injection - Rs.2,647,772 (5480 items)
 2. Liquids - Rs.2,612,180 (6010 items)
 3. General - Rs.2,509,308 (5362 items)
 4. Inhalers - Rs.2,439,249 (5476 items)
 5. Containers - Rs.2,420,339 (5627 items)
 6. Ointments - Rs.2,331,716 (4986 items)

7. Powders - Rs.2,288,196 (5392 items)
8. Surgicals - Rs.2,273,320 (4891 items)
9. Drops - Rs.2,194,744 (5088 items)
10. Tablets - Rs.2,135,633 (4590 items)

Footer Message

- "Click on any deviation segment to see specific breakdown"
- Indicates interactive functionality

Sidebar Navigation

Logo Section

- MedPlus logo at the top
- "Audit Dashboard" text below logo

****Navigation Items**** (five main items)

1. ****Store Coverage**** (active by default)

- Icon: Store/building icon
- Main text: "Store Coverage"
- Subtext: "Coverage & Inventory"
- Highlighted in blue when active

2. ****Live Audit****

- Icon: Clipboard icon
- Main text: "Live Audit"
- Subtext: "Schedule & Progress"

3. ****Auditor Performance****

- Icon: Users icon
- Main text: "Auditor Performance"
- Subtext: "Productivity & Quality"

4. ****Supervisor****

- Icon: User with checkmark icon
- Main text: "Supervisor"
- Subtext: "Approvals & Workload"

5. ****Store PID Allotment****

- Icon: List icon

- Main text: "Store PID Allotment"
- Subtext: "Assign PIDs to Auditors"

****User Profile Section**** (at bottom)

- User role: "HOD Admin"
- User name: "Audit Head"
- Icon: User profile circle

Interaction Behavior

Filter Interactions

Clicking any dropdown expands it downward and displays available options. When selecting an option, the dropdown closes, the selected value is displayed, and all dashboard data refreshes automatically. Multiple filters can be applied simultaneously and work together to narrow down data.

Refresh Now Button

On click, the button briefly shows a loading animation, all data refreshes, and the "Last Refreshed" timestamp updates to current time.

Summary Cards Interactions

- Total Stores Card click transitions to Total Stores Details screen showing a table of all stores
- Covered Stores Card click shows only stores that have been audited
- Uncovered Stores Card click displays stores requiring audit attention
- Cards slightly lift on hover with shadow effect

Chart Interactions

Time period buttons (Quarterly, Half-Yearly, Yearly) update the chart view when clicked. Pie chart segments can be clicked to show drill-down details for that deviation type or product category.

Navigation Interactions

Clicking any sidebar navigation item transitions to that screen and highlights it in blue. Clicking the MedPlus logo returns to this Store Coverage dashboard.

Purpose of Every Action

Filter Purpose

- Financial Year Filter: Enables historical review and year-over-year comparisons
- State Filter: Allows regional managers to focus on their territory
- Store Type Filter: Different stores have different audit requirements
- Audit Job Type Filter: Tracks completion of different audit strategies
- Process Type Filter: Different processes have different accuracy requirements
- Audit Status Filter: Enables workflow management and bottleneck identification

Card Click Purpose

- Total Stores: Provides complete store directory
- Covered Stores: Shows compliance with audit requirements
- Uncovered Stores: Highlights audit gaps requiring immediate attention

Chart Purpose

- Store Recency Analysis: Shows audit frequency distribution over time
- Deviation Distribution: Quantifies financial impact of different deviation types
- Product Form Distribution: Identifies which product categories have most deviations

Visual Documentation

Total Stores - Details Screen

When This Screen Appears

This screen appears when user clicks on the "Total Stores" card on the main dashboard. It displays detailed information about all stores in the system.

Complete UI Breakdown

Header Section

Back Button

- Blue left arrow with "Back" text
- Returns user to Store Coverage dashboard

Page Title

- "Total Stores" displayed prominently

Record Counter

- Shows "Showing X of Y records"
- Updates based on filters and search results

Export Report Button

- Green button with download icon
- Provides dropdown options when clicked

Search and Filter Section

Search Field

- Placeholder: "Search across all fields..."
- Searches through all columns in real-time

State Dropdown Filter

- Default: "All States"
- Filters table to selected state

Store Type Filter Field

- Free-text input field
- Filters stores by name or type

Reset Button

- Clears all search and filter inputs

Data Table

Columns:

1. STORE ID - Unique identifier (MP###)
2. CITY - Location city
3. STORE NAME - Full store name
4. STATE - Operating state
5. STORE TYPE - HUB or REGULAR
6. BOX TYPE - DYNAMIC or REGULAR storage system

7. STORE CREATED DATE - When store was added (YYYY-MM-DD)
8. LAST AUDITED DATE - Most recent audit (YYYY-MM-DD)
9. STATUS - Active/Inactive with colored badge
10. SKUS (count) - Number of unique products
11. QUANTITY (units) - Total product units
12. INVENTORY VALUE MRP (Rs.) - Total inventory value

Interaction Behavior

Back Button

Returns to Store Coverage dashboard with all filters preserved.

Export Report

Opens dropdown with format options (PDF, Excel, CSV), then downloads file containing all visible table data.

Search Functionality

Filters results instantly as user types. Searches across Store ID, City, Store Name, and State. Empty search shows all records.

Filters

State dropdown and store type filter can be combined with search. Reset button clears all filters at once.

Table Sorting

Clicking column headers sorts data in ascending/descending order. Sortable columns include Store ID, City, Store Name, State, Last Audited Date, SKUs, Quantity, and Inventory Value.

Purpose of Every Action

Search and Filter Purpose

- Rapid location of specific stores
- Verification of store data
- Regional analysis and comparison

Export Purpose

- Monthly management reports
- Board presentations
- Store expansion planning
- Comparative analysis

Column Data Purpose

- Store ID: Unique identifier for all communications
- Geographic Information: Resource planning and logistics
- Store/Box Type: Determines audit approach
- Created Date: Assesses store maturity
- Last Audited Date: Critical for audit planning and compliance
- Status: Confirms operational state
- SKUs: Indicates audit complexity
- Quantity: Represents inventory volume
- Value: Financial exposure and risk assessment

Visual Documentation

Live Audit Schedule Screen

When This Screen Appears

This screen appears when user clicks on "Live Audit" in the sidebar navigation. It provides real-time visibility into ongoing audit operations and is the primary screen for monitoring active audits.

Complete UI Breakdown

Audit Status Summary Cards

****Total Card**** - 26 audits (All Audits)

****Pending Card**** - 6 audits (Awaiting action)

****In Progress Card**** - 9 audits (Actively running)

****Completed Card**** - 11 audits (Finalized)

All cards have "Click for details" links for drill-down.

Live Audit Schedule Section

****Section Title:**** "Live Audit Schedule - In Progress"

****Subtitle:**** "Click on any row to view auditor-wise allocation and real-time progress"

Action Bar:

- Export Report button (green)
- Audit counter showing filtered count

Audit Table

Columns:

1. Store ID - Unique identifier with badge format
2. Store Name - Location being audited
3. Supervisor - Responsible manager with icon
4. Assigned Auditors - Count badge + names list
5. Start Date - Audit start date with calendar icon
6. Audit Progress - "X/Y SKUs" text + visual progress bar showing percentage
7. Actions - Reserved column

Sample Data:

- MP0002 Coimbatore-Main: Sourav Das supervising 4 auditors, started 2025-12-15, 86.3% complete
- MP0011 Nizamabad-Hub: Kiran Patel supervising 2 auditors, started 2025-12-04, 87.9% complete
- MP0018 Delhi NCR-Central: Neha Sharma supervising 2 auditors, started 2025-12-09, 35.2% complete

Interaction Behavior

Status Summary Cards

Clicking cards filters the table to show only audits with that status. The In Progress card is the default view.

Export Report

Generates downloadable report with current table data in selected format (PDF, Excel, CSV).

Table Row Click

Opens Store Detail Modal (documented separately) showing comprehensive audit information including individual auditor performance and progress.

Progress Bars

Provide visual at-a-glance status. Hover may show tooltip with exact counts.

Table Sorting

Click column headers to sort by Store ID, Store Name, Supervisor, Start Date, or Progress percentage.

Real-Time Updates

Screen may auto-refresh at intervals. Manual refresh available via "Refresh Now" button.

Purpose of Every Action

Status Cards

- Total: Complete operational overview
- Pending: Identifies work waiting to start, highlights potential delays
- In Progress: Primary operational focus for real-time management
- Completed: Tracks daily/weekly accomplishments

Export Report

- Daily operational reports
- Supervisor performance tracking
- Resource allocation planning
- Historical activity records

Row Click/Modal

- Deep dive into specific store progress
- See individual auditor contributions
- Monitor quality metrics in real-time

- Make immediate adjustments

Progress Tracking

- Estimate completion times
- Identify slow-moving audits
- Allocate additional resources
- Compare performance across stores

Auditor/Supervisor Information

- Know who is working where
- Clear ownership and accountability
- Contact points for questions
- Workload balance visibility

Real-Time Focus

Designed for "right now" operations enabling immediate response and active management.

Visual Documentation

Store Detail Modal

When This Modal Appears

This modal appears when user clicks on any audit row in the Live Audit Schedule table. It provides detailed breakdown of a specific store's audit progress and overlays the current screen with semi-transparent background.

Complete UI Breakdown

Modal Header

****Title:**** Store name - "Store Details" (e.g., "Coimbatore-Main - Store Details")

Actions:

- Download Report button dropdown
- Close button (X)

Store Summary Bar

Four key pieces of information displayed horizontally:

****Store ID**** - Badge display (e.g., "MP0002")

****State**** - Two-letter abbreviation (e.g., "TN")

****Supervisor**** - Name with icon (e.g., "Sourav Das")

****Audit Progress**** - Percentage with blue progress bar (e.g., "86.3%")

Metrics Cards

****Total SKUs:**** 3,317 total products, Audited: 2,862

****Inventory Value:**** Rs.3209K Total Value

PIDs Section

Four metrics in 2x2 grid:

- ****Total PIDs:**** 1,551 physical locations
- ****Pending PIDs:**** 213 (in orange) not yet audited
- ****Total SKUs:**** 3,317 products
- ****Pending SKUs:**** 455 (in orange) awaiting audit

Mismatches Section

Four metrics showing inventory discrepancies:

- ****Total Mismatches:**** 65 count
- ****Pending:**** 26 (in orange) not resolved
- ****Matched:**** 39 (in green) successfully reconciled
- ****Deviations:**** 98 related count

Deviations Section

Three metrics:

- **Total Deviations:** 98 all discrepancies
- **Pending:** 31 (in orange) awaiting resolution
- **Submitted:** 67 (in green) completed for approval

Assigned Auditors Table

Columns:

1. Checkbox (for selection)
2. Auditor Name
3. Assigned SKUs (count)
4. Completed SKUs (count)
5. Progress (%) - visual progress bar
6. Match Rate (%) - accuracy badge

Sample Data:

- Hitesh Shah: 675 assigned, 504 completed, 74.8% progress, 86.2% match rate
- Amit Singh: 673 assigned, 332 completed, 49.4% progress, 95.6% match rate
- Rohit Sharma: 913 assigned, 827 completed, 90.6% progress, 95.9% match rate
- Arun Nair: 1,056 assigned, 456 completed, 43.2% progress, 96.4% match rate

Interaction Behavior

Download Report

Exports store's complete audit data in selected format. Modal remains open after download.

Close Buttons

X button or bottom Close button dismisses modal with animation and returns to Live Audit Schedule.

Scrolling

If content is taller than screen, scroll bar appears. Header and footer remain accessible.

Auditor Table

Clicking column headers sorts data. Rows may highlight on hover but are not clickable for further drill-down.

Real-Time Updates

Data may auto-refresh while modal is open. Progress percentages and completed counts update automatically.

Purpose of Every Action

Modal Display

- Detailed oversight for supervisors
- Remote monitoring capability
- Transparency into operations
- Decision making on resource needs

Store Summary

- Quick context confirmation
- Overall progress assessment
- Contact information for issues

Metrics Cards

- Audit scope and complexity indication
- Financial risk assessment
- Resource adequacy evaluation

PIDs Section

- Physical location tracking
- Route planning
- Complete store coverage assurance

Mismatches Section

- Quality indicator
- Problem identification (theft, errors, system issues)
- Resolution tracking

Deviations Section

- Financial impact visibility
- Compliance documentation

- Approval workflow tracking

Assigned Auditors

- Individual accountability
- Performance visibility (speed and accuracy)
- Workload balance assessment
- Quality control
- Completion forecasting

Visual Documentation

Audit Detail Modal

When This Modal Appears

This modal appears when user clicks on any audit row from various locations in the dashboard:

- From Supervisor Detail Modal: Click any row in the "Audit History" table
- From Auditor Detail Modal: Click any row in the "Audit History" table
- From Live Audit Schedule: Click any store/audit row showing audit progress

This modal provides comprehensive breakdown of a single audit including store details, re-audit metrics, and individual auditor performance.

Complete UI Breakdown

Modal Header

Header Design:

- Purple gradient background (from indigo to purple)
- White text on colored background
- Rounded corners at top

Title Section:

- Icon: Clipboard list icon
- Title: "Audit Details"
- Export button dropdown (white semi-transparent button)

Actions:

- Export dropdown button with two options:
 - Export as Excel
 - Export as PDF
- Close button (X) in top right corner

Hero Card (Main Audit Information)

Visual Design:

- Large white card with shadow and rounded corners
- Purple gradient icon box (48x48 pixels)
- File invoice icon inside

Primary Information:

- Audit ID displayed prominently in large bold text (e.g., "MP0002" or "AUD00691")
- Audit Job Type subtitle (e.g., "Full Audit", "Select SKUs", "Partial Audit")

Store and Timeline Details:

Three pieces of information displayed horizontally with icons:

Store Information:

- Store icon (purple color)
- Store name (e.g., "Coimbatore-Main")

Start Date:

- Green calendar icon
- Label: "Start:"
- Date in DD/MM/YYYY format (e.g., "15/12/2025")

End Date:

- Dark green calendar check icon
- Label: "End:"
- Date in DD/MM/YYYY format (e.g., "18/12/2025")
- May show "-" if audit is still in progress

Total Value Display:

- Positioned in top right of card
- Label: "Total Value" in small gray text
- Large green bold text showing monetary value
- Formatted in Indian currency notation (e.g., "Rs.3209K" or "Rs.2.15 Cr")
- Represents total inventory value for this audit

Re-Audit Summary Section

Section Header:

- Decorative purple gradient bar (4px wide, 20px tall)
- Title: "RE-AUDIT SUMMARY" in uppercase, small font
- Subtitle: "Across all deviation types"

Summary Table:

Clean, modern table showing three categories of audit results:

Table Design:

- Light gray header background
- White row backgrounds
- Thin borders between rows
- Color-coded badges for each category

Columns:

1. Category - Name with colored badge indicator
2. SKUs - Number of unique products (right-aligned)
3. Qty - Total quantity (right-aligned)
4. Value - Monetary value in Rupees (right-aligned, bold)

Three Data Rows:

1. Appeared (Blue Badge)

- Items initially identified with deviations during audit
- Shows all discrepancies that required verification
- SKUs, Qty, and Value displayed
- Value shown in dark text
- Example: 13,081 SKUs, 2.05 L qty, Rs.1.33 Cr

2. Matched (Green Badge)

- Items from "Appeared" that were verified as correct

- Deviations confirmed to be accurate
- High match rate indicates accurate initial audit
- Value shown in green text (#059669)
- Example: 12,221 SKUs, 1.92 L qty, Rs.1.25 Cr

3. Deviations (Yellow Badge)

- Items from "Appeared" that required corrections
- Original audit finding was inaccurate
- Lower is better - indicates quality audit work
- Value shown in orange text (#d97706)
- Example: 860 SKUs, 13,615 qty, Rs.8.51 L

****Formula:**** Appeared = Matched + Deviations

Participating Auditors Section

Section Header:

- Decorative green gradient bar (4px wide, 20px tall)
- Title: "PARTICIPATING AUDITORS" in uppercase
- Count badge showing total number of auditors (e.g., "4")

Auditors Table:

Comprehensive table showing all auditors who worked on this audit:

Table Design:

- Light gray header background
- Hover effect on rows (slight highlight)
- Expandable rows with chevron icons
- Modern, clean styling with rounded corners

Columns:

1. ID - Auditor identifier with badge and chevron icon
2. Auditor Name - Name in purple accent color
3. PIDs - Physical Inventory Displays assigned (right-aligned)
4. SKUs - Stock Keeping Units assigned (right-aligned)
5. Qty - Quantity audited by this auditor (right-aligned)
6. Audited Value - Monetary value audited (right-aligned, green bold text)

Sample Data:

- A039, Hitesh Shah, 675 PIDs, 1,350 SKUs, 1,125 qty, Rs.75.6 K
- A012, Amit Singh, 673 PIDs, 1,346 SKUs, 1,117 qty, Rs.74.2 K
- A028, Rohit Sharma, 913 PIDs, 1,826 SKUs, 1,522 qty, Rs.101.3 K
- A045, Arun Nair, 1,056 PIDs, 2,112 SKUs, 1,760 qty, Rs.117.2 K

Interactive Features:

Chevron Icons:

- Right-pointing arrow when row is collapsed
- Down-pointing arrow when row is expanded
- Small gray icon positioned before the ID badge

Row Click Behavior:

- Click any auditor row to expand/collapse
- Only one row can be expanded at a time
- Background changes to light gray when expanded
- Smooth animation on expand/collapse

Expanded Auditor View:

When an auditor row is clicked, a nested panel expands showing:

Nested Section Header:

- Small purple gradient bar (3px wide, 16px tall)
- Title: "RE-AUDIT SUMMARY" in uppercase, small font

Nested Re-Audit Table:

- Smaller, compact table (max-width 400px)
- Light gray header background
- White row backgrounds
- Shows this specific auditor's re-audit metrics

Three Rows in Nested Table:

1. Appeared (Blue Badge)

- SKUs, Qty, and Value specific to this auditor
- Example: 3,270 SKUs, 51,250 qty, Rs.33.27 L

2. Matched (Green Badge)

- This auditor's verified correct items
- Example: 3,055 SKUs, 47,925 qty, Rs.31.15 L

3. Deviations (Yellow Badge)

- This auditor's items needing correction
- Example: 215 SKUs, 3,325 qty, Rs.2.12 L

Purpose of Nested View:

- Shows individual auditor accuracy
- Identifies high/low performers
- Supports targeted training decisions
- Validates quality of work

Modal Footer

Simple footer with light gray background:

- Close button (outline style, secondary color)
- Rounded corners
- Padding for comfortable spacing

Interaction Behavior

Opening the Modal

Modal opens with smooth animation overlay:

- Semi-transparent dark backdrop dims background
- Modal slides in from center
- Backdrop prevents interaction with underlying content
- Modal can be opened from nested context (modal over modal)

Export Functionality

Clicking Export Button:

- Dropdown menu appears with two options
- Excel option (green Excel icon)
- PDF option (red PDF icon)

Excel Export:

- File name: `Audit_{AuditID}_Report.xlsx`
- Contains audit summary and participating auditors
- Pre-formatted columns
- Ready for further analysis

- File name: `Audit_{AuditID}_Report.pdf`
- Professional format with tables
- Color-coded headers
- All numeric values properly formatted

Auditor Row Expansion

Click any auditor row:

- Row expands smoothly with animation
- Background changes to light gray
- Nested re-audit summary table appears
- Chevron icon rotates to point down

Click expanded row again:

- Row collapses with animation
- Background returns to white
- Nested table disappears
- Chevron icon rotates to point right

Clicking different auditor:

- Previously expanded row collapses automatically
- New row expands
- Only one row expanded at a time

Scrolling Behavior

If content exceeds viewport:

- Vertical scrollbar appears
- Header remains fixed at top
- Smooth scrolling
- Footer remains accessible

Closing the Modal

Three ways to close:

1. Click X button in header
2. Click Close button in footer
3. Click outside modal on dark backdrop

Closing behavior:

- Modal dismisses with fade-out animation
- Returns to previous screen (Supervisor, Auditor, or Live Audit)
- Backdrop fades out
- No data is saved (modal is read-only)

Purpose of Every Action

Modal Display Purpose

Audit Verification:

- Review outcomes after audit completion
- Verify all auditors completed assignments
- Check data quality and accuracy

Issue Investigation:

- Drill down into specific problem audits
- Identify which auditor contributed to issues
- Understand deviation patterns

Performance Analysis:

- Compare auditor performance within same audit
- Identify consistently strong/weak performers
- Assess team coordination and collaboration

Store Analysis:

- Understand inventory accuracy at specific store
- Identify patterns of deviation types
- Plan corrective actions for future audits

Re-Audit Summary Purpose

Understanding Audit Quality:

- Appeared: Shows initial scope of discrepancies
- Matched: Indicates accuracy of initial audit (higher is better)
- Deviations: Shows errors in initial audit (lower is better)

Financial Impact:

- Value columns show monetary implications

- High deviation values require investigation
- Matched values show verified accuracy

Quality Metrics:

- Match rate = Matched / Appeared (as percentage)
- High match rates (>90%) indicate quality work
- Low match rates (<80%) indicate training needs

Auditor-Level Details Purpose

Individual Accountability:

- See exactly what each auditor worked on
- PIDs and SKUs show workload distribution
- Values show responsibility level

Performance Comparison:

- Compare auditors working on same audit
- Identify efficiency differences
- Recognize high performers

Workload Validation:

- Ensure fair distribution of work
- Identify over/under allocation
- Plan better for future audits

Quality Assessment:

- Expanded view shows individual accuracy
- High deviations indicate need for retraining
- Consistent accuracy shows expertise

Export Purpose

For Store Management:

- Share audit results with store managers
- Provide evidence for inventory discrepancies
- Document findings for follow-up

For Finance Team:

- High-value deviation documentation
- Inventory value reconciliation

- Financial reporting backup

For Audit Trail:

- Compliance documentation
- Historical audit records
- Quality assurance evidence

For Analysis:

- Import into BI tools
- Create custom reports
- Trend analysis across multiple audits

Visual Documentation

Auditor Performance Screen

When This Screen Appears

This screen appears when user clicks on "Auditor Performance" in the sidebar navigation. It evaluates individual auditor productivity and quality with comprehensive performance metrics for all auditors.

Complete UI Breakdown

Summary Metrics Cards

****Total Auditors:**** 40 active auditors

****Avg Time / PID:**** 9.7 min productivity efficiency

****Avg Time / SKU:**** 4.0 min productivity efficiency

Deviation Summary Section

Three colored panels:

Appeared Deviations (Blue)

- SKUs: 2.93 L, Qty: 48.20 L, Value: Rs.31.69 Cr
- All discrepancies identified by auditors

****Matched Deviations (Green)****

- SKUs: 2.75 L, Qty: 45.30 L, Value: Rs.29.82 Cr
- Successfully reconciled deviations

Revised Deviations (Yellow/Orange)

- SKUs: 18,189, Qty: 2.90 L, Value: Rs.1.87 Cr
- Deviations requiring correction

Performance Rankings

****Top Performers Section**** (View More button)

1. Rakesh Kumar - 96.2%
2. Ravi Kumar - 95.5%
3. Nikhil Reddy - 95.4%

****Needs Attention Section**** (View More button)

1. Teja Reddy - 92.2%
2. Sashank Reddy - 92.2%
3. Pavan Kalyan - 92.5%

Auditor Productivity Summary Table

****Title:**** "Auditor Productivity Summary"

****Subtitle:**** "Click on any auditor to view detailed performance metrics"

****Search Field:**** "Search by auditor name..."

Columns:

1. Auditor ID (e.g., A046)
2. Auditor Name
3. Total Audits (completed count)
4. Allotted PIDs (total assigned)
5. Allotted SKUs (total assigned)
6. Allotted Qty (quantity to audit)
7. Avg Time/PID (minutes)
8. Avg Time/SKU (minutes)
9. Match Rate % (accuracy)

10. Edit Rate % (correction frequency)

11. Total Value (inventory audited)

12. Actions (empty)

Sample Data:

- A046 Abhinay Naidu: 24 audits, 35,516 PIDs, 1.38L SKUs, 10.05 min/PID, 4.12 min/SKU, 93.3% match, Rs.1.09 Cr
- A037 Uday Varma: 25 audits, 29,640 PIDs, 1.28L SKUs, 9.56 min/PID, 4.03 min/SKU, 94.4% match, Rs.96.24 L

Interaction Behavior

Clicking Auditor Rows

Opens Auditor Detail Modal showing comprehensive performance history including audit history table and deviation statistics.

Search Field

Filters table as user types, searches auditor name and ID, updates results instantly.

Column Sorting

Click headers to sort ascending/descending by performance metrics to identify outliers.

View More Buttons

Expands to show more top/bottom performers, may open separate screen or expand list in place.

Purpose of Every Action

Performance Tracking

- Identifies high performers for recognition
- Identifies low performers for training
- Ensures quality standards maintained
- Supports fair performance evaluation

Productivity Metrics

- Avg Time/PID and Avg Time/SKU show efficiency
- Lower times indicate faster auditors
- Must be balanced with accuracy (Match Rate)

Match Rate

- Shows accuracy of auditor's work
- High match rate = accurate counting
- Low match rate = needs retraining

Edit Rate

- Shows revision frequency
- High rate may indicate carelessness
- Low rate indicates careful work

Rankings

- Top performers deserve recognition
- Bottom performers need support
- Creates healthy competition
- Identifies best practices

Visual Documentation

Auditor Detail Modal

When This Modal Appears

This modal appears when user clicks on any auditor row in the Auditor Performance table. It provides complete performance history for selected auditor including detailed audit history and statistics.

Complete UI Breakdown

Modal Header

Auditor Identification

- Name prominently displayed (e.g., "Abhinay Naidu")
- ID shown below (e.g., "ID: A046")

Actions:

- Download Report button with dropdown
- Date range filters: "From" and "To" date pickers
- Close button (X)

Performance Summary Cards

****Total Audits:**** 37 completed audits

****Total PIDs:**** 45,389 Physical Inventory Displays audited

****Total SKUs:**** 1.81 L (181,000) Stock Keeping Units audited

Deviation Summary Section

Appeared Deviations

- SKUs: 13,081, Qty: 2.05 L, Value: Rs.1.33 Cr
- All discrepancies found by this auditor

Matched Deviations

- SKUs: 12,221, Qty: 1.92 L, Value: Rs.1.25 Cr
- Successfully resolved

Revised Deviations

- SKUs: 860, Qty: 13,615, Value: Rs.8.51 L
- Required correction

Audit History Table

Columns:

1. Store ID
2. Store (name)
3. Date (audit date)
4. Job Type (Full Audit, Select SKUs, Partial Audit)
5. PIDs (count)

6. SKUs (count)
7. QTY (quantity audited)
8. Audited Value (monetary value)

Sample Rows:

- MP0011, Hyd-Jubilee Hills, 06/12/2025, Select SKUs, 2,719 PIDs, 8,156 SKUs, 10,461 qty, Rs.2.15 Cr
- MP0009, Hyd-Tarnaka, 04/12/2025, Select SKUs, 4,685 PIDs, 14,052 SKUs, 11,323 qty, Rs.2.14 Cr
- Complete scrollable audit history showing chronological record

Interaction Behavior

Date Range Filters

Click From/To dates to select date range. Table filters to show audits within selected period.

Download Report

Exports auditor's complete performance data including summary metrics and audit history in selected format.

Table Sorting

Sort by date (most recent), value (highest-value audits), or store (group by location).

Close Buttons

X or Close button returns to Auditor Performance screen with modal animation.

Purpose of Every Action

Individual Performance Review

- Complete audit history for evaluation
- Identifies patterns in work
- Shows consistency over time

Deviation Analysis

- High revision rate indicates quality issues

- Good match rate shows accurate work
- Helps identify training needs

Audit History

- Validates experience level
- Shows store types audited
- Demonstrates workload over time
- Supports compensation/promotion decisions

Date Filtering

- Review specific time periods
- Quarterly/annual performance reviews
- Identify improvement or decline trends

Export

- Performance review documentation
- HR records
- Training needs assessment
- Recognition and reward decisions

Visual Documentation

Supervisor Approvals Screen

When This Screen Appears

This screen appears when user clicks on "Supervisor" in the sidebar navigation. It monitors supervisor workload, audit oversight, and tracks approvals and supervisor performance.

Complete UI Breakdown

Summary Metrics Cards

- **Total Supervisors:** 15 active supervisors
- **Total Stores Managed:** 379 stores under oversight
- **Total Audits:** 876 audits supervised
- **Total Value:** Rs.130.91 Cr total inventory value supervised

Supervisor Performance Summary Table

- **Title:** "Supervisor Performance Summary"
- **Subtitle:** "Click on any supervisor to view detailed performance metrics"
- **Search Field:** "Search by supervisor name..."

Columns:

1. ID (e.g., S001, S002)
2. Name (supervisor name)
3. Stores Managed (count)
4. Total Audits (count)
5. Days Supervised (total days)
6. Auditors Supervised (count)
7. Total SKUs (audited)
8. Total Value (inventory value)
9. Actions (empty)

Sample Data:

- S001 Aditya Reddy: 26 stores, 53 audits, 206 days, 39 auditors, 10.17 L SKUs, Rs.8.13 Cr
- S002 Srinivas Rao: 26 stores, 54 audits, 223 days, 40 auditors, 8.32 L SKUs, Rs.8.79 Cr
- S004 Praveen Chowdary: 27 stores, 71 audits, 283 days, 40 auditors, 12.98 L SKUs, Rs.10.22 Cr

Interaction Behavior

Clicking Supervisor Rows

Opens Supervisor Detail Modal (if implemented) showing stores managed, auditor teams, approval history, and pending items.

Search Field

Filters supervisors by name or ID, updates table instantly.

Column Sorting

Sort by Stores Managed (workload), Total Value (responsibility level), or Audits (activity level).

Export Report

Downloads complete supervisor performance data including all visible columns, respects active filters.

Purpose of Every Action

Workload Monitoring

- Ensures even distribution across supervisors
- Identifies overloaded or underutilized supervisors
- Supports resource reallocation

Performance Tracking

- Days supervised shows experience/availability
- Audits count shows throughput
- Auditors supervised shows span of control

Value Oversight

- Higher value indicates greater responsibility
- Helps determine compensation
- Shows trust and capability level

Quality Management

- Supervisors approve audit results
- Track approval speed and accuracy
- Ensure proper oversight of audit quality

Visual Documentation

Supervisor Detail Modal

When This Modal Appears

This modal appears when user clicks on any supervisor row in the Supervisor Performance Summary table. It provides comprehensive breakdown of a supervisor's performance, audit oversight activities, and workload over a selectable time period.

Complete UI Breakdown

Modal Header

Supervisor Identification

- Name prominently displayed (e.g., "Aditya Reddy")
- ID shown below name (e.g., "ID: S001")

Actions:

- Download Report button with dropdown (Excel/PDF export options)
- Date range filters:
 - "From" date picker (default: 1 year ago)
 - "To" date picker (default: today)
 - Maximum range: 1 year (365 days)
 - Validation prevents invalid date selections
 - Warning message displays if dates are invalid
- Close button (X)

Performance Summary Cards

Four key metrics displayed in card format:

Total Audits Card

- Number of unique audits supervised within selected date range
- Displayed with gradient blue background (purple to light blue)
- Icon: Clipboard list icon
- Example: "37" audits

Days Supervised Card

- Number of distinct days actively overseeing audits
- Calculated from day-wise summary data
- White background card
- Example: "206" days

Total PIDs Card

- Aggregate count of Physical Inventory Displays supervised
- White background card
- Formatted with Indian number notation (L for lakhs, Cr for crores)
- Example: "45,389" PIDs

Total SKUs Card

- Total Stock Keeping Units supervised across all audits
- White background card
- Formatted with Indian number notation
- Example: "1.81 L" SKUs

Deviation Summary Section

****Section Header:**** "DEVIATION SUMMARY"

Three deviation category cards with colored left borders:

Appeared Deviations (Blue Border)

- Shows initial discrepancies identified during audits
- Three rows of data:
 - SKUs: Count of unique products with deviations
 - Qty: Total quantity of items with deviations
 - Value: Monetary value in Rupees (formatted as Indian currency)
- Example: SKUs: 13,081, Qty: 2.05 L, Value: Rs.1.33 Cr

Matched Deviations (Green Border)

- Shows deviations that were verified and confirmed as correct
- Three rows of data:
 - SKUs: Count verified
 - Qty: Quantity verified
 - Value: Monetary value
- Higher match rates indicate accurate initial audits
- Example: SKUs: 12,221, Qty: 1.92 L, Value: Rs.1.25 Cr

Revised Deviations (Yellow Border)

- Shows items that required supervisor correction
- Three rows of data:
 - SKUs: Count requiring revision
 - Qty: Quantity revised
 - Value: Monetary value
 - Lower values indicate better auditor accuracy
 - Example: SKUs: 860, Qty: 13,615, Value: Rs.8.51 L

Audit History Table

****Section Header:**** "AUDIT HISTORY"

Comprehensive table showing all audits supervised within the date range:

Columns:

1. Store ID - Unique identifier (clickable, displayed in primary blue color)
2. Store - Store name
3. Date - Audit start date (DD/MM/YYYY format)
4. Job Type - Type of audit (Full Audit, Select SKUs, Partial Audit)
5. PIDs - Number of physical inventory displays
6. SKUs - Number of stock keeping units
7. QTY - Quantity of items audited
8. Value - Total audited value (Indian currency format)

Table Features:

- Sortable columns: Click headers to sort ascending/descending
- Sort indicators: Up/down arrows show current sort direction
- Sticky header: Column headers remain visible while scrolling
- Row hover effect: Rows highlight on hover
- Clickable rows: Click any row to open Audit Detail Modal

Sample Data:

- MP0011, Hyd-Jubilee Hills, 06/12/2025, Select SKUs, 2,719 PIDs, 8,156 SKUs, 10,461 qty, Rs.2.15 Cr
- MP0009, Hyd-Tarnaka, 04/12/2025, Select SKUs, 4,685 PIDs, 14,052 SKUs, 11,323 qty, Rs.2.14 Cr

Interaction Behavior

Date Range Filters

Selecting Dates:

- Click "From" date picker to select start date
- Click "To" date picker to select end date
- Table automatically filters to show audits within selected range

Date Validation:

- "From" date cannot be after "To" date
- Date range cannot exceed 1 year (365 days)
- Invalid selections show warning message for 2 seconds
- Automatically reverts to last valid date range if validation fails

Download Report

Excel Export:

- File name format: `Supervisor_{SupervisorID}_Report.xlsx`
- Contains two sections:
 - Summary metrics (audits, days, PIDs, SKUs, deviations)
 - Complete audit history table
- Pre-formatted columns for readability

PDF Export:

- File name format: `Supervisor_{SupervisorID}_Report.pdf`
- Landscape orientation for better table viewing
- Contains:
 - Header with supervisor name, ID, and date range
 - Metrics summary table
 - Deviation summary table
 - Audit history table (on second page)

Table Sorting

Click any column header to sort data:

- First click: Ascending order
- Second click: Descending order
- Sort icon updates to show current direction
- Useful for identifying highest/lowest values

Audit Row Click

Clicking any audit row in the table opens the Audit Detail Modal showing:

- Complete audit breakdown
- Re-audit summary for that specific audit
- List of participating auditors
- Deviation details for that audit

Close Buttons

X button in header or Close button dismisses modal and returns to Supervisor Approvals Screen.

Purpose of Every Action

Modal Display

- Provides detailed oversight for managers
- Enables performance evaluation of supervisors
- Supports workload balancing decisions
- Tracks audit quality and accuracy

Date Filtering

- Review specific time periods
- Quarterly or annual performance reviews
- Identify improvement or decline trends
- Focus on recent activity

Performance Metrics

- Total Audits: Shows workload volume
- Days Supervised: Indicates availability and engagement
- PIDs/SKUs: Demonstrates scope of responsibility
- Combined metrics help assess supervisor capacity

Deviation Analysis

- Appeared Deviations: Shows all discrepancies found
- Matched Deviations: Indicates audit accuracy
- Revised Deviations: Highlights correction needs
- Helps identify training requirements

Audit History

- Complete audit trail for accountability
- Validates experience and capability
- Shows consistency over time
- Supports promotion/compensation decisions

Export Functionality

- Performance review documentation
- Sharing with HR or management
- Historical record keeping
- Compliance documentation

Drill-Down Capability

- Click audit rows to investigate specific audits
- Understand context behind metrics
- Identify patterns or problems
- Make informed decisions

Visual Documentation

Store PID Allotment Screen

When This Screen Appears

This screen appears when user clicks on "Store PID Allotment" in the sidebar navigation. It assigns Physical Inventory Display locations (PIDs) to auditors and manages audit task distribution within a single store.

Complete UI Breakdown

Store Header

Store Identification:

- Store name displayed prominently (e.g., "Chennai Central")
- Subtext: Location and Store ID (e.g., "Tamil Nadu | Store ID: MP001")

Status Metrics (5 boxes):

1. Total PIDs: 15 total locations
2. Assigned: 5 PIDs allocated
3. Unassigned: 10 PIDs available
4. In Progress: 1 currently being audited
5. Completed: 1 finished PIDs

PID Management Section

****Section Title:**** "PID Management"

Search and Filter Bar:

- Search field: "Search by PID, description, or auditor..."
- Filter buttons: "All PIDs" (default), "Not Assigned", "Reassign"

Action Buttons:

- "Assign (0)" - disabled when no PIDs selected (number shows selection count)
- "Bulk Reassign (0)" - disabled when no PIDs selected

PID Table

Columns:

1. Checkbox (for selection)
2. PID Number (e.g., PID001, PID002)
3. SKU Count (products in location)
4. Description (location code like A1-56, B6-7)
5. Assign Status (Not Assigned / Assigned)
6. Audit Status (Pending / Not Started / In Progress / Completed)
7. Auditor Name (assigned person or "-")
8. Actions (Reassign button when applicable)

Sample Rows:

****PID001**** (Assigned, In Progress)

- SKUs: 245, Description: A1-56, Auditor: Amit Singh
- Checkbox disabled, no action button

****PID002**** (Not Assigned)

- SKUs: 189, Description: B6-7, Auditor: -
- Checkbox enabled, no action button yet

****PID004**** (Assigned, Not Started)

- SKUs: 156, Description: A3-45, Auditor: Priya Reddy
- Checkbox enabled, Reassign button available

****PID009**** (Completed)

- SKUs: 198, Description: C7-12, Auditor: Amit Singh
- Checkbox disabled, no action button

Interaction Behavior

Filter Buttons

- "All PIDs": Shows complete list
- "Not Assigned": Shows only unassigned PIDs
- "Reassign": Shows PIDs that are assigned but not started

Checkboxes

Checking PIDs highlights rows and increases count in Assign/Reassign buttons. Multiple PIDs selectable. Select all checkbox in header checks all eligible PIDs.

Assign Button

When PIDs selected, button becomes enabled. Clicking opens assignment dialog listing available auditors. After assignment, PIDs update to "Assigned" status with auditor name.

Reassign Button (Individual)

Clicking opens reassignment dialog showing current auditor and alternatives. User selects new auditor and confirms. Row updates with new auditor name maintaining "Not Started" status.

Bulk Reassign Button

When multiple assigned PIDs selected, button enables. Opens bulk dialog allowing assignment of all selected to one auditor or distribution among multiple.

Search Field

Filters table as user types, searches PID number, description, and auditor name in real-time.

Purpose of Every Action

PID Management

- Breaks store into manageable sections
- Each PID represents physical location (aisle, shelf)
- Efficient auditor routing through store

Assignment

- Ensures every location covered
- Prevents duplicate work
- Balances workload among auditors

Status Tracking

- Shows in-progress PIDs
- Identifies completed work
- Highlights remaining work

Reassignment

- Adjusts for auditor availability
- Rebalances workload if behind
- Responds to changing circumstances

Filter Functions

- Not Assigned: Identifies unallocated work, ensures complete coverage
- Reassign: Shows flexible assignments for workload optimization

SKU Count

- Estimates time required per PID
- Higher count = longer time
- Used for fair workload distribution

Checkbox Disable Logic

- Can't reassign in-progress work (protects auditor continuity)
- Can't modify completed work (maintains audit integrity)

Bulk Operations

- Saves time for many PIDs
- Efficient initial allocation
- Quick last-minute adjustments

Visual Documentation

End of Documentation

This comprehensive documentation covers all major screens, modals, and interactions in the MedPlus Audit Dashboard application. Each section provides detailed information about what appears on screen, how users interact with elements, and the business purpose behind each feature.

The documentation is designed for managerial review and decision-making, focusing on functionality and user experience rather than technical implementation.