

AI Powered SMART PHARMA CRM



Revolutionize your sales with the power of AI precision

How to View the Smart Pharma CRM Report

Smart Pharma CRM gives you a clear, AI-powered picture of your sales operations—automatically linking chemist entries, prescription activity, and product performance. Here's how you can view and use the report effectively from the web:



Step-by-Step Guide

-Viewing the Report

1. Login to the Web Dashboard

- Visit your company's CRM portal.
- Enter your login credentials.

2. Navigate to the Business Insights Report

- Go to the **Reports** section.
- Click on “**Business Insights**” to open the report panel.

The screenshot shows the AI SANTE web dashboard. On the left, there is a sidebar with various menu items: Dashboard, Analytic Dashboard, Admin Panel, Tour Program, Approvals, Mapping, Reports (which is currently selected and highlighted in purple), Holidays, SFC, Attributes, Inventory, Incentive, Events, and a user profile for Vidisha Joshi Admin. The main area displays a grid of report cards. The "Business Insights" card is highlighted with a purple border, indicating it is the active report. Other visible report cards include CRM, Target Achievement, 3P Report, Visit Report, JWR Observation Report, Doctor Visit Count Report, DCR Report, RCPA Report, and Chemist Visit Frequency. Each card has a small icon representing the report type in the top right corner.

3. Choose Filters and Parameters

- Select desired **date range** (daily, weekly, monthly, custom).
- Apply filters like **region, product, chemist, or doctor** to narrow down results.

AI SANTE WHERE CARE GETS CLEVER

Search...

- Dashboard
- Analytic Dashboard
- Admin Panel
- Tour Program
- Approvals
- Mapping
- Reports**
- Holidays
- SFC
- Attributes
- Inventory
- Incentive
- Events

Vidisha Joshi Admin

Start Month * 01/12/2024 End Month * 12/31/2024 Doctor ATUL JANI

Specialty MD Category A State GUJARAT

HQ VADODARA City VADODARA

4. Automatic Data Mapping (Behind the Scenes)

- AI maps entries made through the **chemist bot**.
- It connects sales quantities and values to relevant chemists, doctors, and products without any manual effort.

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Vidisha Joshi Admin

ATUL JANI PHYSICIAN Vadodara | (794) 269-9979 | - DR NILESH BHINDI HARGOTI 0 0 0 0

Visit Report

#	User Name	Completed Date
1	JITENDRA KUKADIA	04/03/2025 06:10 PM
2	PRAKASH CHANDRA	06/01/2025 06:38 PM
3	PRAKASH CHANDRA	25/01/2025 07:53 PM
#	Product Name	Duration (seconds)
1	TELEXA-40	1
2	ACCUHYDRO-25	0
3	TELEXA AM	0
4	BIOXIGA MS-100	1
4	PRAKASH CHANDRA	26/01/2025 06:27 PM
5	PRAKASH CHANDRA	07/02/2025 06:27 PM
6	PRAKASH CHANDRA	19/02/2025 06:40 PM
7	PRAKASH CHANDRA	21/02/2025 06:46 PM



5. View Key Insights in the Report

- **CRM-Wise View:** Get structured reports based on chemist interactions, product sales, and regional performance.
- **Doctor-Wise View:** See how individual doctors are responding—how many prescriptions are linked to your products and how they trend over time
- **Real-Time RCPA Insights:** Understand actual vs potential sales and sales gaps from chemist-level inputs.
- **Doctor Prescription Influence:** Track which doctors are contributing to prescriptions and the effectiveness of your brand reach.

RxIntelAI

MAIN OFFICE :

Sankalp Square 3B, 1101 to 1106, Sindhujivan Rd, beside Taj Skyline,
PRL Colony, Thaltej, Ahmedabad, Gujarat 380058

Mo. +91 88497 01120

mail : info@aisante.in

website : aisante.in