

Pega's University Program



Drug Purchase Reminder (Use Case)



Copyright 2020
Pegasystems Inc., Cambridge, MA
All rights reserved.

This document describes products and services of Pegasystems Inc. It may contain trade secrets and proprietary information. The document and product are protected by copyright and distributed under licenses restricting their use, copying, distribution, or transmittal in any form without prior written authorization of Pegasystems Inc.

This document is current as of the date of publication only. Changes in the document may be made from time to time at the discretion of Pegasystems. This document remains the property of Pegasystems and must be returned to it upon request. This document does not imply any commitment to offer or deliver the products or services provided. This document may include references to Pegasystems product features that have not been licensed by your company. If you have questions about whether a particular capability is included in your installation, please consult your Pegasystems service Consultant.

PegaRULES, Process Commander, SmartBPM® and the Pegasystems logo are trademarks or registered trademarks of Pegasystems Inc. All other product names, logos and symbols may be registered trademarks of their respective owners. Although Pegasystems Inc. strives for accuracy in its publications, any publication may contain inaccuracies or typographical errors. This document or Help System could contain technical inaccuracies or typographical errors. Changes are periodically added to the information herein. Pegasystems Inc. may make improvements and/or changes in the information described herein at any time.

This document is the property of:
Pegasystems Inc.
1 Rogers Street
Cambridge, MA 02142
Phone: (617) 374-9600
Fax: (617) 374-9620
www.pegasystems.com

Document Name: 20_Drug Purchase Reminder
Date: 27/01/2021

Table of Contents

Contents

1	Drug Purchase Reminder - 10 hrs	Error! Bookmark not defined.
---	---------------------------------------	-------------------------------------

Drug Purchase Reminder – 10 Hours

Use Case ID:	UC-20	Version	1.0
Use Case Name:	Drug Purchase Reminder		
Platform Details	Pega 8.4	Time for completion	10 hours
Created By:	ShivRam	Last Updated By:	
Date Created:	27-01-2021	Last Revision Date:	02-02-2021
Concepts Covered	<ol style="list-style-type: none"> 1. Case Design (Primary & Alternate stages) 2. Routing – Worklist 3. Service Level Agreements 4. Data Design – creation of data types 5. Data Transform 6. Locally Sourced Data, Data pages 7. Work party, Correspondence 8. Validations 9. User Interface – Layouts 10. Attach Content, Create PDF 11. Reports 12. Delegation 		
Description:	<p>‘CUREX’ is a medical store company which has branches all over India. Since the business is expanded and in order to maintain customer relationship, they want to build a Pega application to capture the medication details of all customer who buy medicines from them so that they can send a reminder to customer for next purchase order.</p> <p>Each medical Store has Medical Agent who can help customer in creating a new account. Medical Agent will collect the respective details from the Customer to complete the registration process. The Customer ID is generated after the registration process gets completed.</p> <p>If the Customer is based from INDIA then the details are saved into the database immediately else the details have to be submitted to the Medical Supervisor for the approval. The Medical supervisor must approve or reject the request within 24 hours.</p> <p>The database should contain information about both accepted and rejected request to refer any information in future. If the Customer is already an existing user, then Medical Agent will enter the Customer ID to populate the details and proceed with buying medicine.</p> <p>In the Buying medicine screen, Medical Agent will enter the illness details. Based on the illness, the respective medicine will be displayed. The selected medicines are displayed in the separate page and based on quantity the cost gets calculated.</p> <p>In this scenario, we are enquiring customer whether to send reminder for the next purchase.</p> <p>In the Buying medicine screen, Medical Agent will also find a link or a button ‘View previous Orders’ to display the previous order purchased by the Customer.</p> <p>The current purchase date and next reminder date should be automatically calculated and stored in the database.</p>		

	<p>Once the medicine details are verified by the Medical Agent the flow proceeds with payment child case. The customer can pay by Cash or Card.</p> <p>Medical Supervisor is also responsible for sending purchase order reminders to the customer based on Next purchase date or if the inventory medicine is below Threshold value.</p> <p>Since we are already capturing the next purchase date, Medical Supervisor upon selecting the date will be able to see all the details of Customer for whom the mail has to be sent.</p> <p>'CUREX' also provides other medical services like 'Curex Lab at Home', 'Curex Physio at Home', however current application is just to create a reminder to contact the customer based on the medicine purchase date or if the inventory of medicine is below the threshold value.</p> <p>'Medical Agent' and 'Medical Supervisor' are the end user of this application.</p> <p>'Medical Agent' captures the details into the system when customer visits their store.</p> <p>'Medical Supervisor' need reports which are explained in additional requirements details</p>
Actors:	Magent@CUREX (Case Worker),MSupervisor@CUREX (Case Manager)
Trigger:	Case is instantiated when medical agent starts the customer registration process or perform purchase medicine.
Pre-conditions:	<p>Create an Operator ID Magent@CUREX and MSupervisor@CUREX.</p> <p>Medical Agent upon login will be redirected to case worker portal for processing new customer registration and Medical Supervisor will be redirected to Case Manager portal for approving request.</p>
Post-conditions:	<p>On successful completion of the Customer registration, Customer will get email that contains the Customer ID.</p> <p>On successful completion of the Purchase medicine, next purchase date is stored in the SOR which is used for future reminders.</p>
Normal Flow:	<p>Customer Registration</p> <ol style="list-style-type: none"> 1. Medical Agent will login with the respective Operator ID 2. Medical Agent can perform 2 Transactions: New Customer Registration or Purchase Order 3. If Medical Agent clicks on New Customer registration, Customer registration details screen is displayed to the user. 4. After entering all the details, Medical agent submit the form. In the next screen, Medical agent can review the details entered and observe the Customer ID is auto populated. 5. After review, Medical Agent can submit the form. If the Customer Country is selected as INDIA, then the details are directly stored in the SOR. 6. If the Country is not selected as INDIA, then it is routed to the Medical supervisor for the Approval. Medical supervisor can approve or reject the request. <p>Purchase Order and Payment</p> <ol style="list-style-type: none"> 1. If Medical Agent click on Purchase Order Case type, the purchase order screen gets displayed. Here Medical Agent can find the option called View Previous order to check the previous order details of the customer. 2. In the purchase medicine screen, Medical Agent can choose the Illness type. Based on illness type, respective drugs are displayed. Medical Agent can choose Add to Cart wherever the stock is available. If the Stock is not available, Add to Cart option will not appear.

3. In the next screen the selected medicine details will appear. Medical agent can enter the units required and daily unit information. Based on that stock days gets calculated.
4. After the medicine details are confirmed, the payment child case gets created. Medical agent will choose the payment mode and confirm the details. Once submitted all the details are stored in the Database.

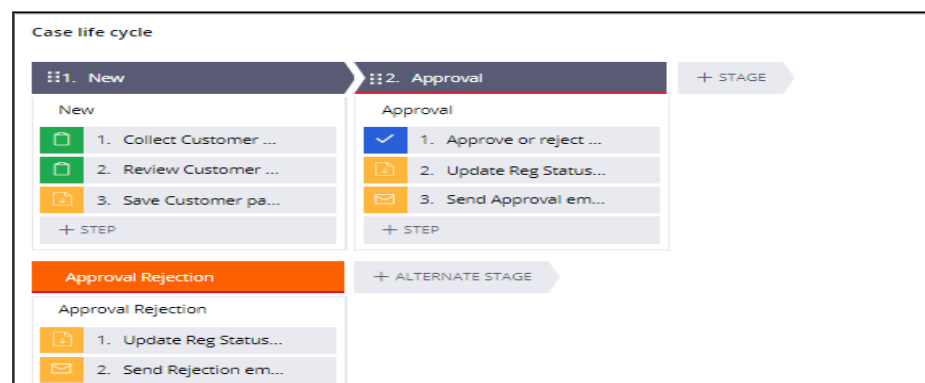
Purchase Reminder

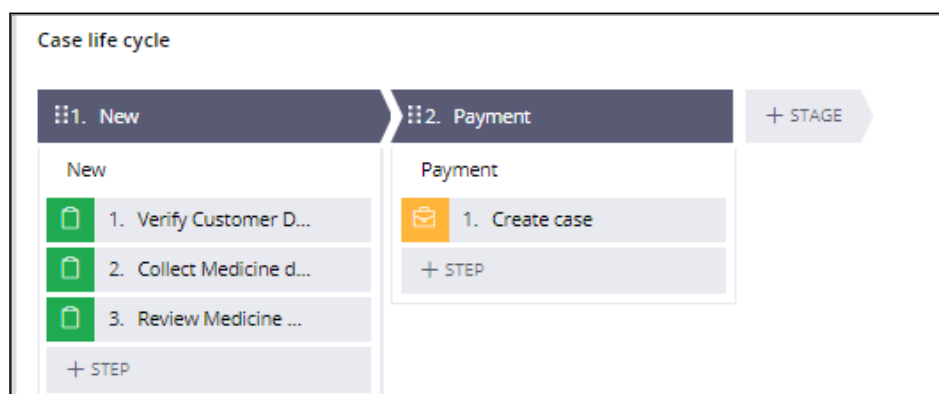
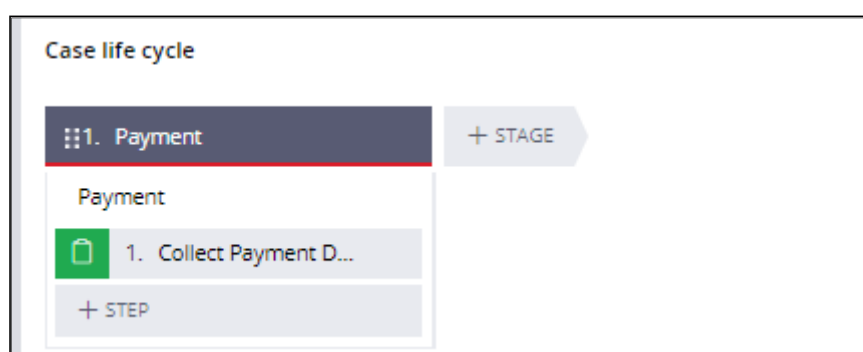
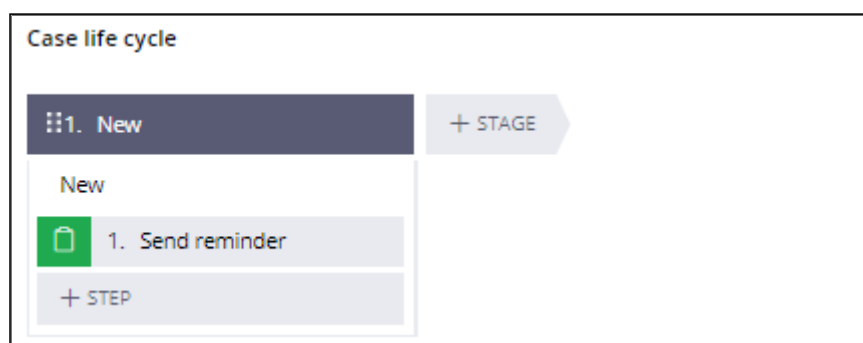
1. Medical Supervisor can click on Purchase reminder case type.
2. In the purchase reminder screen, Medical supervisor can choose the date. The date selected by the manager will be compared with the next purchase date, only those customer details will be displayed.
3. Once manager submit the request, the reminder mail will be sent to all the customer. Medical Agent captures details for all fields shown in the mock-up, Please note when details are persisted into 'Order' data table, it should also save Purchase Date, Next Purchase Date and Stock Days, It is very important to note that the Purchase Date is always Current Date of the system.

Points to Note:

1. 'Next Purchase Date' field is shown to the user based on selection but stored in data base table
2. 'Purchase Date' and 'Stock Days' fields are not for showing to the user but stored in table and used for logic as explained below
3. The logic to generate 'Next Purchase Date' is 'Current Date' + 'Stock Days'
4. 'Stock Days' calculation logic is 'Units to Buy' divided by 'Daily Dosage Units', for example, if 'Daily Dosage Units' is 2 units and if 'Units to Buy' are 30 units, then that stock will lost for $2 / 30 = 15$ days, hence 'Next Purchase Date' is 15 days after 'Current Date'.

Customer Registration :



Purchase Order :**Payment (Child case) :****Purchase Reminder :**

** These case life cycle design mentioned here is for your reference purpose. You can innovate them by adding more ideas.

Alternative Flows:

Medical Supervisor can reject the Customer Request

Approval Rejection

Approval Rejection



1. Send rejection mail

+ STEP

Mock Up Screens

Views in your solution should match the exact mockups shown here

New Customer Register Screen

Collect Customer Details

Customer Details

FirstName *

Joe

LastName *

Adams

FullName

Joe Adams

Gender *

☒ Male

☐ Female

DOB *

10/12/1990

Age

30

MobileNumber *

9871209876

Email ID *

JoeAdam@gmail.com

Customer Address

Country *

India

State *

Andhra Pradesh

City *

Hyderabad

Street *

13 Thiru Sreet

Pincode *

500045

Review Customer Details Screen by Medical Agent

Review Customer Details

Review Customer Details

CustomerID

CUREX-1612361552

FirstName

Joe

LastName

Adams

FullName

Joe Adams

Gender

Male

DOB

10/12/1990

Age

30

Email ID

JoeAdam@gmail.com

MobileNumber

9871209876

Customer Address

Street

13 Thiru Sreet

State

Andhra Pradesh

City

Hyderabad

Country

India

Pincode

500045

Cancel

Save

Submit

In the above case Since the Customer is of INDIA Origin, the details are saved into the SOR directly. In case if the customer does not belong to INDIA, then the case is routed to Medical supervisor for the approval.

Medical Supervisor Approval Screen for your reference:

Approval

Please approve or reject this Customer Registration

Review Customer Details

CustomerID
CUREX-1612362297

FirstName
Mark

LastName
Jem

FullName
Mark Jem

Gender
Male

DOB
9/11/1991

Age
29

Email ID
Mark@gmail.com

MobileNumber
8976543210

Customer Address

Street
14A XYZ Street

State
California

City
Los Angeles

Country
Others

Pincode
000001

Notes *

Cancel

Reject

Approve

Customer Details Data type below for reference:

- Here if you observe the registration Status Column , The Status will be either Approved or Rejected or Pending Approval.
- If the Country selected is of INDIA, The record is saved to the database with the status as "Approved".
- If the Country selected is not of INDIA Origin, the case is routed to the medical supervisor and the record is saved to the database with the status as "Pending-Approval".
- If the manager approves the request, the status is changed from "Pending-Approval" to "Approved"
- If the manager rejects the request, the status is changed from "Pending-Approval" to "Rejected"

CustomerID*	AgeForDB	FullNameForDB	Reg status	MobileNumber	Email ID	Gender	LastName	FirstName
CUREX-1611792355	25	Oliver Prasanna	Approved	9710345098	oliver@gmail.com	Male	Prasanna	Oliver
CUREX-1611792488	20	Akshay A	Approved	9871201291	a@gmail.com	Male	A	Akshay
CUREX-1611838850	30	Ashwin Kumar	Approved	9876412345	Ashwin@gmail.com	Male	Kumar	Ashwin
CUREX-1611842195	28	Ashwin Kumar	Pending Approval	7812012345	Jency@gmail.com	Female	Kumar	Ashwin
CUREX-1611973178	10	sam jude	Approved	7550210771	sam@gmail.com	Male	jude	sam
CUREX-1612361552	30	Joe Adams	Approved	9871209876	JoeAdam@gmail.com	Male	Adams	Joe
CUREX-1612362297	29	Mark Jem	Rejected	8976543210	Mark@gmail.com	Male	Jem	Mark

Purchase Medicine:

1. Verify Existing Customer Details Screen

Note : Customer ID can be autocomplete or dropdown as per your choice. It should display only those Customer ID whose registration Status is approved.

Verify Customer Details

Customer ID
CUREX-1612361552

Customer Details

FirstName	Email ID
Joe	JoeAdam@gmail.com
LastName	MobileNumber
Adams	9871209876
Full Name	Reg status
Joe Adams	Approved
Age	Gender
30	Male

2. Purchase Medicine Order Screen

In this screen, Medical Agent can search medicine either by Illness type or typing few letters of the medicine name.

For the medicines where stock is greater than 0 , Add to Cart option is visible Otherwise it is disabled as shown in the below image.

Collect Medicine details

View Previous Orders

Illness Type
Fever

Enter Medicine Name
do

Medicine Details

	ItemID	ItemName	Price Per Unit	Status	Stock	Select
1	CURIT001	Dolo 650	5	Available	285	<button>Add to Cart</button>
2	CURIT007	Aspirin 20mg	3	Available	315	<button>Add to Cart</button>
3	CURIT012	Aspirin 30 mg	4	Available	127	<button>Add to Cart</button>
4	CURIT014	E-600	10	Available	130	<button>Add to Cart</button>
5	CURIT015	Action 500	3	Not Available	0	

Cancel
Save
Submit

3. Verify Selected Medicine Screen

Quantity represent the Bought unit (no of tablet purchased)

Daily unit represent the intake of tablet. (2 times in a day, 3 times in a day)

Stock days are calculated as Quantity/Daily Unit

Review Medicine Details

Cart Details

ItemID	ItemName	Price Per Unit	Status	Stock	Quantity	Daily Unit	Stock Days	Item Price
1	CURIT001 Dolo 650	5	Available	285	<input type="text" value="10"/>	<input type="text" value="3"/>	3	\$50.00
2	CURIT007 Aspirin 20mg	3	Available	315	<input type="text" value="5"/>	<input type="text" value="1"/>	5	\$15.00

Total Cost

\$65.00

Cancel

Save

Submit

4. Payment Screen

Collect Payment Details

Customer ID
CUREX-1612361552

Total Cost
\$95.00

Payment Mode
☒ Cash
☐ Card

☒ Remainder For Next Purchase ?

OrderTransactionID
ORD-1972

Cancel

Save

Submit

Once the payment is completed, the order details are stored into the Order Data type as shown in the image below :

IsReminderQue	Next PD	Stock Days	Bought Unit	Daily Unit	PurchaseDate	ItemType	ItemName	ItemID	OrderID	CustomerID
true	3/2/2021	5	10	2	1/29/2021	Head ache	PX-450	CURIT006	ORD-7835	CUREX-1611792355
true	3/2/2021	5	10	2	1/29/2021	Fever	Dolo 650	CURIT001	ORD-8192	CUREX-1611792355
true	3/2/2021	5	15	3	1/29/2021	General Vitamin	TrueBasics Multivit	CURIT011	ORD-7539	CUREX-1611792355
true	2/5/2021	3	10	3	2/2/2021	Fever	Dolo 650	CURIT001	ORD-1972	CUREX-1612361552
true	2/7/2021	5	5	1	2/2/2021	Fever	Aspirin 20mg	CURIT007	ORD-1972	CUREX-1612361552

Invoice is also sent to the Customer in a PDF format.

Incase if the medical agent books medicine for the same patient, in the purchase medicine screen Medical agent can click on View previous order to see the order history of the customer.

Collect Medicine details

[View Previous Orders](#)

Illness Type: Vitamin Deficiency Enter Medicine Name:

Medicine Details

	ItemID	ItemName	Price Per Unit	Status	Stock	Select
1	CURIT004	HealthKart	10	Available	120	Add to Cart
2	CURIT005	Multivitamin	150	Available	145	Add to Cart
3	CURIT011	TrueBasics Multivit	12	Available	112	Add to Cart

Collect Medicine details

[View Previous Orders](#)

Illness Type: Vitamin Deficiency Enter Medicine Name:

Medicine Details

	ItemID	ItemName
1	CURIT004	HealthKart
2	CURIT005	Multivitamin
3	CURIT011	TrueBasics Multivit

[Cancel](#)

DisplayPreviousOrders

Displaying Previous Order Details of Customer ID : CUREX-1612361552

Order ID	Item ID	Item Name
ORD-1972	CURIT001	Dolo 650
ORD-1972	CURIT007	Aspirin 20mg

[Cancel](#) [Submit](#)

Case details

Last updated by: Oliver (1m ago)
Created by: Oliver (1m ago)

Assignments

Select Medicine details

Followers (0)

[No items](#)

Purchase Reminder Screen:

Medical supervisor will select the date. This date will be compared with the next purchase column in the order data type. For those customer whose reminder has to be sent details will be displayed.

Once Medical supervisor submit the screen , the reminder mail would be sent to all the customers.

Send reminder

SelectReminderDate

2/7/2021

▼ CustomerDetails

+ Add item × Delete

	CustomerID	ItemID	ItemName	ItemType
1	CUREX-1612361552	CURIT007	Aspirin 20mg	Fever

Email Template- upon medical supervisor receiving the request

Dear Medical supervisor,

Request Number : << Case ID >>

You have received a new request for an approval. Ensure the request is approved within 1 day.

Regards,

Curex Team

Email Template: if Medical Supervisor approved the request

Dear Magent,

Request Number : << Case ID >>

New Customer registration request for the Customer ID <<.CustomerID>> has been approved

Regards,

Medical Supervisor

	<p>Email Template if Medical Supervisor rejected the request</p> <p>Dear Magent,</p> <p>Request Number : << Case ID >></p> <p>New Customer registration request for the Customer ID <<.CustomerID>> has been rejected due to << comments >></p> <p>Regards,</p> <p>Medical Supervisor</p> <p>EmailTemplate- Registration Confirmation to the Customer</p> <p>Dear << Customer Name >>,</p> <p>Welcome to CUREX Health care.</p> <p>We are happy to inform you that your Customer registration is successful. Below is the Customer ID for your reference</p> <p>Customer ID : <<Customer ID>></p> <p>Regards,</p> <p>Medical Supervisor</p> <p>Email Template – Next purchase Reminder</p> <p>Dear <<Customer ID>>,</p> <p>Greetings! Hope you are healthy and safe!</p> <p>It's time to get your regular medicine. As per your last medicine purchase with us, we understood that your next purchase date of your regular medicine should be today.</p> <p>Kindly visit our medical store and ensure to get your regular medicines on time.</p> <p>In case if you are not able to visit our medical store, we request you to call on 044-12234587 and get free home delivery service.</p> <p>We always assure best services.</p> <p>Regards,</p> <p>Medical Supervisor</p>
Exceptions:	NA
Includes	Create data types in the appropriate layers and create reusable sections
Frequency of use	Minimum 50 requests per day

Special Requirements:	<ul style="list-style-type: none"> • In Customer Registration Screen All the fields are compulsory. • Age and Full Name must be auto calculated • DOB has to be a past date • 'Mobile Number' is a phone field which should only valid 10-digit number • 'Illness Type' drop down is populated from a data base table which is maintained by the Medical Supervisor, based on the illness Type, the 'medicine details' will be displayed in read-only mode • Medical Agent captures the Medicine Advised to the Patient, one patient may have many drugs advised , Capture the 'Drug name' and 'Dosage unit per day', but sometime patient don't want to buy, hence 'Units to buy' field should be displayed only when they want to buy. • 'Next Purchase Date' is an auto calculated read-only field appears only when 'Reminder For Next Purchase Date' check box selected • Customer ID must be automatically generated • Order ID must be automatically generated 																																		
Future Requirements:	<ul style="list-style-type: none"> • OTP can be generated and sent to customer mobile number for verification purpose • Customer ID to be sent in SMS 																																		
Assumptions:	NA																																		
Notes and Issues:	NA																																		
Reports	<p>Medical Supervisor should be able to see the below reports</p> <ol style="list-style-type: none"> 1. Next purchase details of the customer based on the selected date. 2. Approved/Rejected/Pending-Approval customer details on the current day 3. Approved/Rejected/Pending-Approval Customer details for the current month 4. Medicine details based on the Item ID 5. Order details based on the Order ID 6. Total sales in the Current day 7. Total Sales in the Current month 8. The Medical Supervisor runs a report to see which patient requires reminder in next 7 days (more details below for your reference) <p>Use Appropriate Charts wherever required.</p>																																		
Delegation	Medical Supervisor can add/delete/update medicine details																																		
Acceptance Criteria	Unit test to ensure that the individual configurations are working as expected.																																		
Functional Testing	All requirements should be implemented UI screens should adhere to the mock up screen formats [developers can improve the layout/formats of the UI screens]																																		
Data Fields Matrix	<table border="1"> <thead> <tr> <th>Data Type</th><th colspan="3">Medicines</th></tr> <tr> <th>Data Fields</th><th>Type</th><th>Expected Values</th><th>Additional Info</th></tr> </thead> <tbody> <tr> <td>ItemID</td><td>Text</td><td></td><td></td></tr> <tr> <td>ItemName</td><td>Text</td><td></td><td></td></tr> <tr> <td>IllnessType</td><td>Text</td><td></td><td></td></tr> <tr> <td>PricePerUnit</td><td>Currency</td><td></td><td></td></tr> <tr> <td>Stock</td><td>Integer</td><td></td><td></td></tr> <tr> <td>Status</td><td>Text</td><td>Available, Not Available</td><td></td></tr> </tbody> </table>			Data Type	Medicines			Data Fields	Type	Expected Values	Additional Info	ItemID	Text			ItemName	Text			IllnessType	Text			PricePerUnit	Currency			Stock	Integer			Status	Text	Available, Not Available	
Data Type	Medicines																																		
Data Fields	Type	Expected Values	Additional Info																																
ItemID	Text																																		
ItemName	Text																																		
IllnessType	Text																																		
PricePerUnit	Currency																																		
Stock	Integer																																		
Status	Text	Available, Not Available																																	

Data Type	Customer		
Data Fields	Type	Expected Values	Additional Info
CustomerID	Text	Key: AutoGenerated	EX: CUREX-1611792355
FirstName	Text		
LastName	Text		
FullName	Text	AutoGenerated	Combination of FirstName and LastName
Date of Birth	Date		
Age	Integer	AutoGenerated	Based on DOB selected
Gender	Picklist(RadioButtons)	Male, Female	
Mobile	Phone		
Email	Email		
Registration Status	Text	Approved, Rejected, Pending Approval	Depending on medical supervisor approval

Data Type	Customer Address		
Data Fields	Type	Expected Values	Additional Info
CustomerID	Text	Key: AutoGenerated	
Street	Text		
Country	Picklist(Dropdown)		Add all the country names
State	Picklist(Dropdown)		Based on Country, states to be auto populated
City	Picklist(Dropdown)		Based on State, City to be auto populated
Pincode	Text		

Data Type	Payment		
Data Fields	Type	Expected Values	Additional Info
CustomerID	Text		
OrderID	Text	Key	
Payment mode	Picklist (Radiobuttons)	Card, Cash	
Amount	Currency		
Status	Text	Success, Failure	

Data Type	Orders		
Data Fields	Type	Expected Values	Additional Info
CustomerID	Text		
OrderID	Text		
ItemID	Text		
ItemName	Text		

	IllnessType	Text		
	PurchaseDate	Date	Current Date	
	Daily Unit	Integer		
	Buys Unit	Integer		
	Stock Days	Integer	Buys unit / Daily Unit	
	Next Purchase Date	Date	Purchase Date + Stock Days	
	Reminder	Boolean		

Medicine details for your reference: (Save this into a CSV file and import them into medicine data type for which the Local SOR is configured)

Illness Type	ItemID	ItemName	Price Per Unit	Status	Stock
Fever	CURIT001	Dolo 650	5	Available	300
Fever	CURIT002	Paracetamol	2	Available	150
Cold	CURIT003	ibuprofen	5	Available	134
General Vitamin	CURIT004	HealthKart	10	Available	120
Vitamin Drinks	CURIT005	Multivitamin	150	Available	150
Headache	CURIT006	PX-450	5	Not Available	0
Fever	CURIT007	Aspirin 20mg	3	Available	315
Cold	CURIT008	acetaminophen	2	Available	214
Fever	CURIT009	pseudoephedrine	4	Available	150
General Vitamin	CURIT010	MuscleBlaze MB-VITE	15	Not Available	0
General Vitamin	CURIT011	TrueBasics Multivit	12	Available	450
Fever	CURIT012	Aspirin 30 mg	4	Available	127
Cold	CURIT013	pseudoephedrine	3	Available	124
General Vitamin	CURIT014	E-600	10	Available	130
Headache	CURIT015	Action 500	3	Not Available	0