



# Case Flow

## Step 1: Create Case / Generate Lead (Assigned user)

- Hospital (dropdown, required)
- Doctor (dropdown, required)
- Expected Case Date & Time (datetime input, required)
- Supply Before (datetime input)
- Principal(s) (multi-select dropdown, required at least one)
- Portfolio / Category / Subcategory (dropdowns based on Principal)
- Product List (checkbox list + input: required qty, available qty)
- General Remarks (textarea)
- Case ID (auto-generated, readonly)

## Step 2: Inventory Arrangement (Assigned user)

- Required Products Table – select arranged product qty; if unavailable, request PO
- Add new Products (Principal, Category, Product, Quantity, Reason)
- Tray Items (Name, Count, multiple file upload for tray pics)
- Tool Items (Name, Count, multiple file upload for tool pics)
- Image Uploads (multiple images for arranged products, trays, tools)
- Remarks (textarea)
- Submit to Approval (send back to Lead user)

## Step 3: Lead Approval Workflow (Assigned user)

- Case Details (readonly)
- Highlight newly added products from Step 2
- Products & Tools Tables (editable qty)
- Add New Product/Tray/Tools (optional)

- Remarks (required if Hold/Reject)
- Actions (Approve / Hold / Reject)
- If Approved → generate invoice & go to Step 4
- If Rejected → revert to Step 2

## Step 4: Assign Supplier

- Supply Before (readonly from Step 1)
- Supply TO (hospital destination)
- Preview Invoice
- Assign Supplier (dropdown, required)
- Internal Surgeon (dropdown, required)
- Remarks

## Step 5: Delivery Status Tracking (Supplier)

### Pick Up

- Supply Before & Supply TO (readonly)
- Pickup checkbox (auto fetch date/time)
- Image Upload (multi)

### Delivered

- Delivery checkbox (auto fetch date/time)
- OT Person Present (checkbox)
- Name, Email, Phone (required)
- Image Upload (multi: Signature, Stamp, Products, Tools, Trays)

## Step 6: After Case Details

- Case ID (dropdown)
- Patient Details (Name, IP No, Age, Actual Surgery Date & Time)
- Product Table (Sent Qty readonly, Used Qty input)

- Image Uploads (multi)
- Product Dispatch Table (Dispatch Qty, Destination, Location, Remarks)
- Tray & Tools info + Delivery Type
- Assign Person(s) for dispatch
- Dispatch Preview
- Collect Before (date & time)
- Remarks

## Step 7: Billing & Finance

### Step 7.1: Billing – Used Products

- Case ID
- Used Products Table (readonly: Product, Principal, Qty, DP/MRP)
- Selling Price (editable, must be between DP & MRP)
- Request Approval (Admin)

### Step 7.2: Approval Selling Price (Admin)

- Action (Approve / Reject)
- If Reject → Enter Billing Amount & Remarks → Step 7.3
- If Approve → Generate Invoice → send to Operations

### Step 7.3: Edit Selling Price (Finance)

Adjust & request approval again.

### Step 7.4: Assign Cash/Invoice Collector

Assign user, preview invoice, remarks.

### Step 7.5: Collect Person

Destination hospital, submit invoice or cash collection.

### Final (Admin)

- BD Charges, Transport Charges, Other Charges
- Calculate Profit % & Amount

## Step 8: Transport Details

- Product Dispatch Table
- Collect Before (readonly)

- Remarks

## Step 9: Delivery Person

- Pick up from Location
- Collect Before
- Started & Reached (auto timestamps)
- QC: Stock verification, mark products as Good/Missing/Damaged
- Upload Images
- Available Products Count

## Step 10: Inventory Approval

- Approved Date (auto)
- Status (Accepted / Hold / Rejected)
- Remarks
- If Hold → Forward to Hospital/Principal with details

## Step 11: Delivery Collect (if approved)

- Collected Date & Time
- Destination Location
- Document Upload
- Remarks
- Product Details Table (preview)
- Reached destination timestamp

## Step 12: Inventory QC

- Products Table (Name, Qty, Condition, Remarks, Billable)

- If Missing/Damaged + Billable → Auto Invoice → Finance
- If not billable → Mark as loss
- Request for Approval

### Step 13: Inventory QC Approval

- Action (Approve / Reject)
- If Approve → Add back to inventory
- Remarks